

MUNICIPALITY: ESSA

| 1. SUPPLY | | |
|----------------------------------|---|------------|
| | Non-developable (Env) | ha |
| | Occupied | - |
| | Underutilized Gross Vacant | 80 |
| | Gross Vacant | - |
| | Total Supply | 113 |
| B. Gross Developable Supply | | |
| | Underutilized + Vacant | 113 |
| C. Net Vacant Developable Supply | | |
| | Net-to-Gross Adjustment (Refer to notes) | 87% |
| | Net Vacant Developable Supply (ha) | 98 |

Final supply verified by County and local municipal staff.
Municipal-specific data/assumption.

Source: Hemson Consulting based on information from the County of Simcoe.

| 2. DEMAND - Designated Employment Land (**See notes) | | | |
|--|--------------------|---------------------|--------------------|
| A. Forecast Total Place of Work Employment (Based on Growth Plan Schedule 7) | | 2011 | 7,710 |
| | | 2031 Forecast | 9,000 |
| | | 11-31 Growth | 1,290 |
| B. Forecast Employment Growth by Type | | Employment Type | Job Growth by Type |
| | Population-Related | 35% | 446 |
| | Rural-based | 14% | 175 |
| | Employment Land | 52% | 669 |
| | Total Check | 100% | 1,290 |

| C. Number of Jobs to be Accommodated on Employment Lands | Employment Type | Employment Growth by Type by Location | | | | | |
|--|-------------------------------|---------------------------------------|----------------|--------------------------------------|----------------|-------------|--------------|
| | | Designated Employment Lands | | Not on "Industrial" Employment Lands | | Total Check | |
| | | Share (%) | Number of Jobs | Share (%) | Number of Jobs | | |
| | Population-Related Employment | 10% | 45 | 90% | 402 | 100% | 446 |
| | Rural-based Employment | 2% | 4 | 98% | 172 | 100% | 175 |
| | Employment Land Employment | 95% | 636 | 5% | 33 | 100% | 669 |
| | TOTAL | | 684 | TOTAL | 606 | | 1,290 |

| D. Employment Land Demand (Ha) | Number of jobs on Employment Lands | 684 |
|--------------------------------|---|-----------|
| | Estimated Average Density (jobs / net ha) | 20 |
| | Employment Land Need (ha) | 34 |

Source: Hemson Consulting based on Statistics Canada, Growth Plan Schedule 7.

| 3. EMPLOYMENT LAND BUDGET RESULTS | | |
|-----------------------------------|---|-----------|
| A. Supply | | |
| | Net vacant developable supply | ha |
| | Adjustment for long-term vacancy and underutilization | 98 |
| | Long-term development supply (ha) | 0.85 |
| | 83 | |
| B. Demand | | |
| | Employment Land Need (ha) | 34 |
| C. Results (Supply - Demand) | | |
| | Sufficiency of supply: Excess vs (shortage) ha | 49 |

If the result indicated is a positive figure, there is sufficient currently designated employment land supply to accommodate forecast demand for employment lands under Schedule 7. If a (negative) figure is indicated, the municipality may require additional employment lands to meet its Schedule 7 employment forecast.

| **Note(s): | |
|------------|---|
| 1. | A net-to-gross adjustment of 80% is made on parcels larger than 5 ha to account for roads and utilities if it is subdivided. For those parcels under 5 ha, no adjustment is made. The overall net-to-gross thus varies by local municipality consistent with the parcel size characteristics of the supply. A greater prevalence of smaller parcels results in a higher net-to-gross factor (> 80%) because smaller (<5 ha) parcels are not adjusted. |
| 2. | Of the 7,710 2011 base employment, approximately 3,700 jobs were located on CFB Borden. These are outside of the normal land use designations in the Township for employment areas or commercial and institutional uses. |
| 3. | Of the remaining 4,010 jobs in 2011, approximately 1,590 were located on designated employment lands resulting in an average estimated employment density of approximately 20 jobs/ ha on the occupied supply. |
| 4. | The Schedule 7 forecast does not anticipate growth in employment on CFB Borden to 2031. |

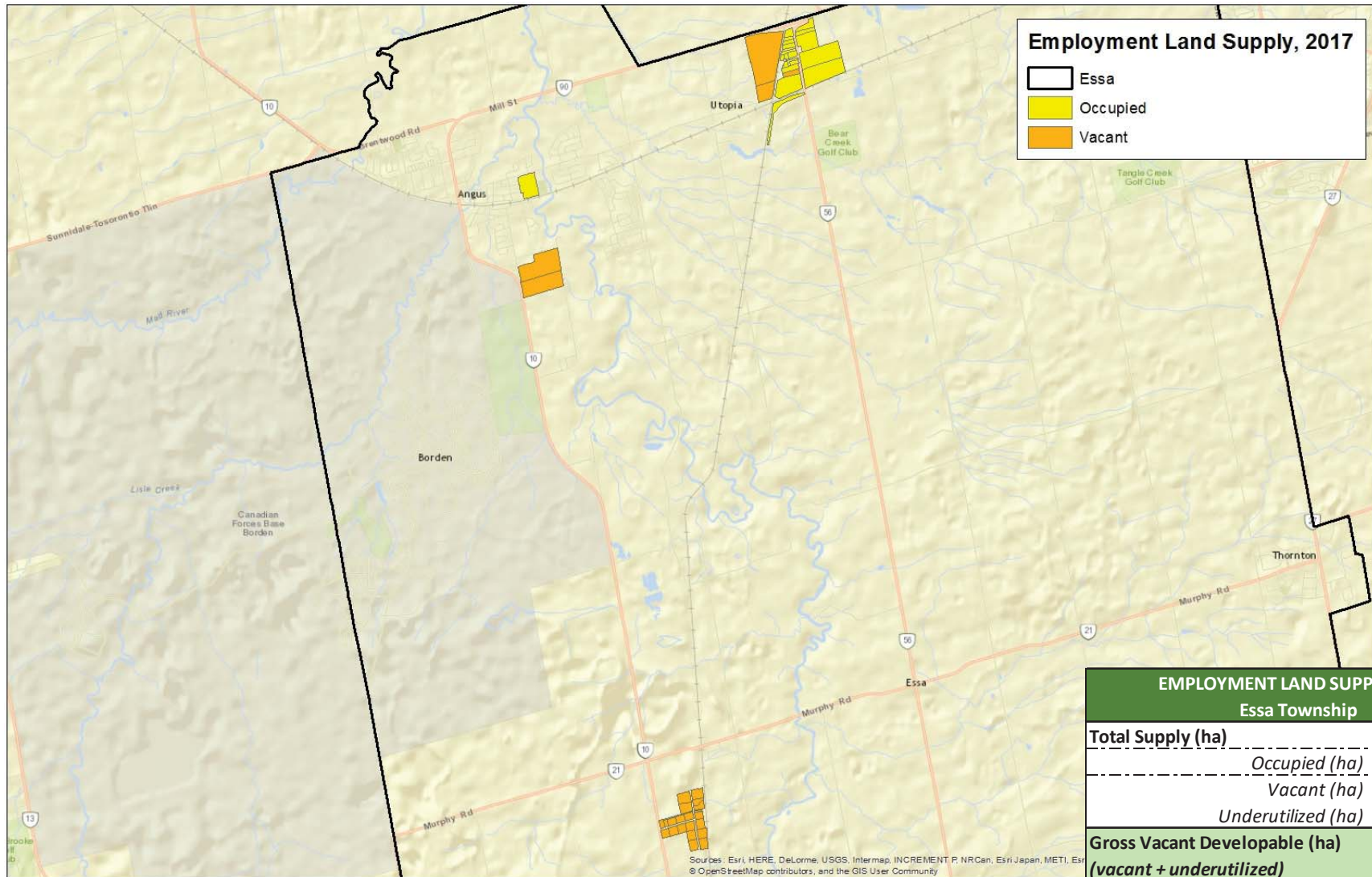
| 4. Commercial Land Need ¹ | | | | |
|---|--|----------------------------------|-------------------|-----------------|
| A. Work at Home Employment (based on population) | | Population | Work at Home Jobs | % of Population |
| | | 2011 | 19,138 | 520 |
| | 2031 | 21,500 | 584 | 3% |
| | 11-31 Growth | 2,362 | 64 | |
| B. Population-Related Employment (PRE) 11-31 Growth by Location | Location | Share of PRE Growth ² | | Jobs |
| | Work at Home | 14% | | 64 |
| | Employment Lands | 10% | | 45 |
| | Institutional | 25% | | 112 |
| | Commercial | 51% | | 226 |
| | Total | 100% | | 446 |
| C. Commercial Land Need | Number of PRE Jobs on Commercial Lands | | | 226 |
| | Estimated Average Density (jobs/ ha) | | | 50 |
| | Estimated Commercial Land Need (ha) | | | 5 |

Source: Hemson Consulting based on Statistics Canada, Growth Plan Schedule 7.

¹The approach taken here estimates commercial land demand tied to the Schedule 7 employment forecast. It provides a rough estimate of land need for commercial uses only and is not intended to take the place of a more specific retail-based analysis for commercial land need.

²Shares based on Statistics Canada 2011 National Household Survey information by North American Industry Classification (NAICS).

HEMSON



Employment Land Supply, 2017

- Essa
- Occupied
- Vacant

| EMPLOYMENT LAND SUPPLY, 2017 | |
|---|--------------|
| Essa Township | |
| Total Supply (ha) | 193.4 |
| <i>Occupied (ha)</i> | 80.3 |
| <i>Vacant (ha)</i> | 113.0 |
| <i>Underutilized (ha)</i> | - |
| Gross Vacant Developable (ha) (vacant + underutilized) | 113.0 |
| Net Vacant Developable (ha) | 98.1 |