



City of Kawartha Lakes G.M.S.

Supplementary Growth and Urban Land Needs Analysis

January 2025

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1. Introduction

Provided herein is a summary of the City of Kawartha Lakes Growth Management Strategy growth forecast, supply and Land Needs Analysis summary.

2. City-wide Population, Housing and Employment Growth Projections, 2021 to 2051

2.1 City of Kawartha Lakes Population and Housing Growth

Figure 1
City of Kawartha Lakes
Population and Housing Growth 2021 to 2051

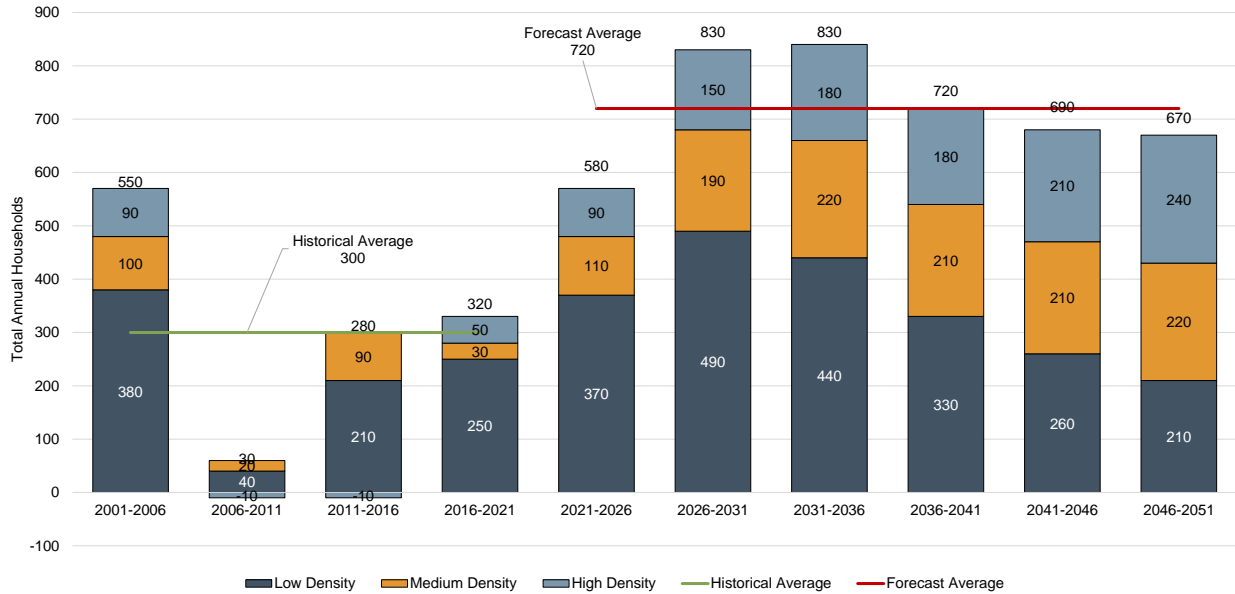
| | Year | Population (Including Census Undercount) ^[1] | Population Excluding Census Undercount | Housing Units | | | | Person Per Unit (P.P.U.): Total Population/ Total Households | |
|-------------|---------------------|---|--|-------------------------|-----------------------------------|---------------------------|-------|--|------------------|
| | | | | Singles & Semi-Detached | Multiple Dwellings ^[2] | Apartments ^[3] | Other | | Total Households |
| Historical | Mid 2011 | 75,030 | 73,214 | 25,470 | 1,215 | 2,820 | 176 | 29,681 | 2.47 |
| | Mid 2016 | 77,290 | 75,423 | 26,515 | 1,495 | 2,765 | 325 | 31,100 | 2.43 |
| | Mid 2021 | 81,210 | 79,247 | 27,955 | 1,495 | 2,950 | 310 | 32,710 | 2.42 |
| Forecast | Mid 2026 | 86,700 | 84,600 | 29,820 | 2,050 | 3,420 | 310 | 35,600 | 2.38 |
| | Mid 2031 | 96,200 | 93,900 | 32,260 | 3,010 | 4,180 | 310 | 39,760 | 2.36 |
| | Mid 2036 | 105,600 | 103,000 | 34,440 | 4,090 | 5,060 | 310 | 43,900 | 2.35 |
| | Mid 2041 | 114,000 | 111,200 | 36,090 | 5,150 | 5,980 | 310 | 47,530 | 2.34 |
| | Mid 2046 | 122,200 | 119,200 | 37,410 | 6,220 | 7,020 | 310 | 50,960 | 2.34 |
| | Mid 2051 | 130,000 | 126,900 | 38,470 | 7,330 | 8,210 | 310 | 54,320 | 2.34 |
| Incremental | Mid 2011 - Mid 2016 | 2,260 | 2,209 | 1,045 | 280 | -55 | 149 | 1,419 | |
| | Mid 2016 - Mid 2021 | 3,920 | 3,824 | 1,440 | 0 | 185 | -15 | 1,610 | |
| | Mid 2021 - Mid 2026 | 5,490 | 5,353 | 1,865 | 555 | 470 | 0 | 2,890 | |
| | Mid 2021 - Mid 2031 | 14,990 | 14,653 | 4,305 | 1,515 | 1,230 | 0 | 7,050 | |
| | Mid 2021 - Mid 2036 | 24,390 | 23,753 | 6,485 | 2,595 | 2,110 | 0 | 11,190 | |
| | Mid 2021 - Mid 2041 | 32,790 | 31,953 | 8,135 | 3,655 | 3,030 | 0 | 14,820 | |
| | Mid 2021 - Mid 2046 | 40,990 | 39,953 | 9,455 | 4,725 | 4,070 | 0 | 18,250 | |
| | Mid 2021 - Mid 2051 | 48,790 | 47,653 | 10,515 | 5,835 | 5,260 | 0 | 21,610 | |

^[1] Population includes the net Census undercount of 2.7% and has been rounded.

Source: Watson & Associates Economists Ltd.



Figure 2
City of Kawartha Lakes
Housing Forecast by Structure Type, 2021 to 2051



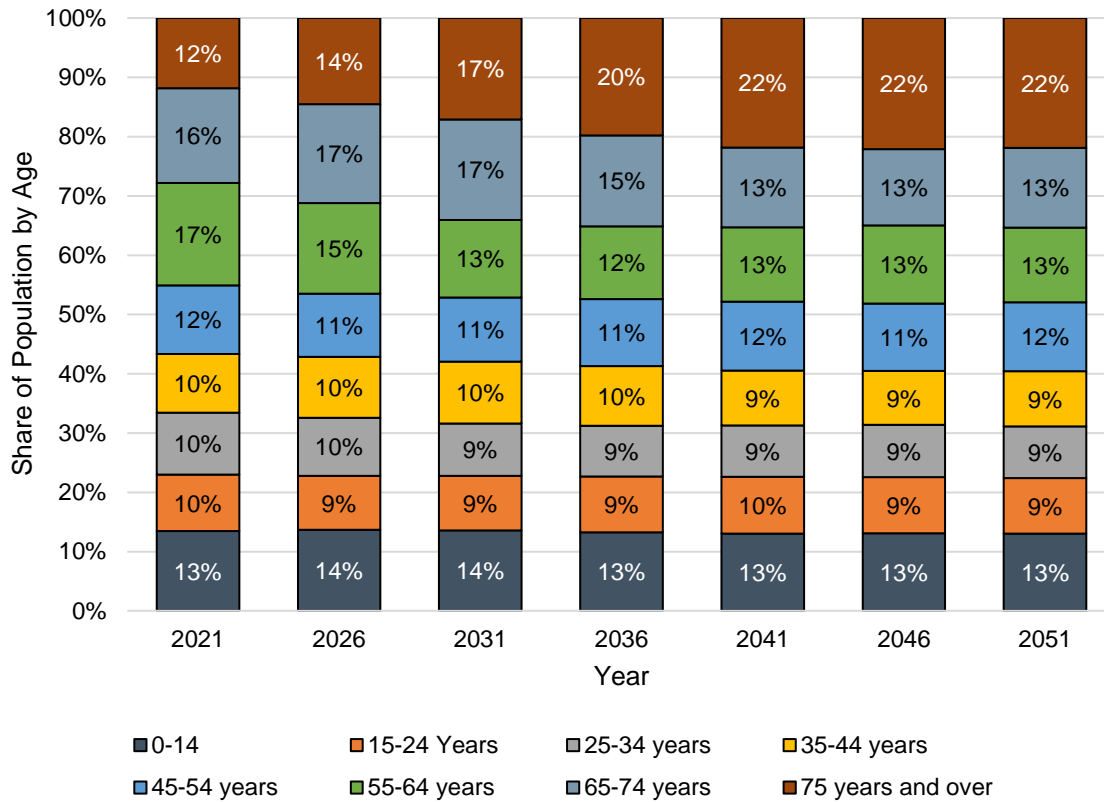
Notes:

- Low-density includes singles & semi-detached, and “other” households.
- Medium density includes townhouses and apartments in duplexes.
- High-density includes bachelor, 1 bedroom and 2 bedroom+ apartments.
- Figures have been rounded.

Source: 2021 derived from Statistics Canada Census, 2021, and 2021 to 2051 forecast by Watson & Associates Economists Ltd.



Figure 3
City of Kawartha Lakes
Population Growth by Age Cohort 2021 to 2051



Note: Population includes the net Census undercount and has been rounded.
Source: Watson & Associates Economists Ltd.



2.1.1 City of Kawartha Lakes Employment Growth

Figure 4
City of Kawartha Lakes
Employment Growth by Land Use Category, 2021 to 2051

| Year | P.R.E. | E.L.E. | Rural | Total |
|---------------------|--------|--------|-------|--------|
| Mid-2016 | 17,270 | 6,140 | 450 | 23,860 |
| Mid-2021 | 16,790 | 6,350 | 464 | 23,604 |
| Mid-2023 | 17,440 | 6,590 | 480 | 24,510 |
| Mid-2026 | 18,990 | 6,900 | 510 | 26,400 |
| Mid-2031 | 21,150 | 7,600 | 560 | 29,310 |
| Mid-2036 | 23,290 | 8,420 | 600 | 32,310 |
| Mid-2041 | 25,050 | 9,200 | 650 | 34,900 |
| Mid-2046 | 27,010 | 10,000 | 690 | 37,700 |
| Mid-2051 | 29,320 | 10,560 | 730 | 40,610 |
| Incremental Growth | | | | |
| Mid-2016 - Mid-2023 | 170 | 450 | 30 | 650 |
| Mid-2023 - Mid-2026 | 1,550 | 310 | 30 | 1,890 |
| Mid-2023 - Mid-2031 | 3,710 | 1,010 | 80 | 4,800 |
| Mid-2023 - Mid-2036 | 5,850 | 1,830 | 120 | 7,800 |
| Mid-2023 - Mid-2041 | 7,610 | 2,610 | 170 | 10,390 |
| Mid-2023 - Mid-2046 | 9,570 | 3,410 | 210 | 13,190 |
| Mid-2023 - Mid-2051 | 11,880 | 3,970 | 250 | 16,100 |

P.R.E. means Population Related Employment and includes commercial, institutional, work at home, and off-site employment

E.L.E. means Employment Land Employment and includes primarily industrial employment

Source: Historical Growth from Statistics Canada Census data; forecast by Watson & Associates Economists Ltd., 2024.



2.1.2 Population and Housing Growth by Planning Policy Area

Figure 5
City of Kawartha Lakes
Population and Housing Forecast Allocations, 2021 to 2051

| | Development Location | Timing | Single & Semi-Detached | Multiples ¹ | Apartments ² | Total Residential Units | Population | Existing Unit Population Change | Net Population Increase |
|---------------|----------------------|-------------|------------------------|------------------------|-------------------------|-------------------------|------------|---------------------------------|-------------------------|
| Lindsay | D.G.A. | 2021 - 2026 | 1,172 | 308 | 156 | 1,636 | 3,830 | (180) | 3,650 |
| | | 2021 - 2031 | 2,901 | 838 | 523 | 4,263 | 9,830 | (170) | 9,660 |
| | | 2021 - 2036 | 3,368 | 572 | 806 | 4,746 | 10,940 | (150) | 10,790 |
| | | 2021 - 2041 | 4,172 | 1,047 | 1,253 | 6,472 | 14,570 | (60) | 14,510 |
| | | 2021 - 2046 | 4,215 | 1,487 | 1,700 | 7,402 | 16,170 | 100 | 16,270 |
| | | 2021 - 2051 | 4,527 | 1,463 | 2,087 | 8,076 | 17,490 | 260 | 17,760 |
| | B.U.A. | 2021 - 2026 | 101 | 115 | 251 | 466 | 850 | (190) | 660 |
| | | 2021 - 2031 | 108 | 314 | 600 | 1,022 | 1,760 | (180) | 1,580 |
| | | 2021 - 2036 | 116 | 485 | 912 | 1,514 | 2,560 | (160) | 2,410 |
| | | 2021 - 2041 | 146 | 652 | 1,199 | 1,997 | 3,380 | (60) | 3,320 |
| | | 2021 - 2046 | 167 | 813 | 1,535 | 2,515 | 4,230 | 100 | 4,340 |
| | Total | 2021 - 2026 | 1,272 | 423 | 407 | 2,102 | 4,680 | (370) | 4,310 |
| | | 2021 - 2031 | 3,009 | 1,153 | 1,123 | 5,285 | 11,590 | (350) | 11,240 |
| | | 2021 - 2036 | 3,485 | 1,057 | 1,719 | 6,260 | 13,500 | (300) | 13,200 |
| | | 2021 - 2041 | 4,318 | 1,699 | 2,452 | 8,469 | 17,940 | (120) | 17,820 |
| 2021 - 2046 | | 4,383 | 2,300 | 3,235 | 9,918 | 20,400 | 200 | 20,610 | |
| Fenelon Falls | D.G.A. | 2021 - 2026 | 122 | 42 | 20 | 183 | 420 | (60) | 360 |
| | | 2021 - 2031 | 294 | 45 | 12 | 351 | 860 | (60) | 800 |
| | | 2021 - 2036 | 503 | 61 | 22 | 586 | 1,440 | (50) | 1,390 |
| | | 2021 - 2041 | 631 | 202 | 35 | 868 | 2,060 | (20) | 2,040 |
| | | 2021 - 2046 | 815 | 302 | 72 | 1,190 | 2,780 | 30 | 2,810 |
| | | 2021 - 2051 | 997 | 327 | 118 | 1,442 | 3,360 | 90 | 3,450 |
| | B.U.A. | 2021 - 2026 | 12 | 8 | 8 | 28 | 60 | (60) | - |
| | | 2021 - 2031 | 13 | 23 | 20 | 55 | 100 | (60) | 50 |
| | | 2021 - 2036 | 15 | 34 | 30 | 79 | 150 | (50) | 100 |
| | | 2021 - 2041 | 21 | 46 | 39 | 106 | 200 | (20) | 180 |
| | | 2021 - 2046 | 25 | 57 | 50 | 131 | 240 | 30 | 280 |
| | Total | 2021 - 2026 | 133 | 50 | 28 | 211 | 480 | (120) | 360 |
| | | 2021 - 2031 | 307 | 68 | 31 | 406 | 960 | (110) | 850 |
| | | 2021 - 2036 | 519 | 95 | 52 | 666 | 1,590 | (100) | 1,490 |
| | | 2021 - 2041 | 653 | 248 | 74 | 974 | 2,260 | (40) | 2,220 |
| 2021 - 2046 | | 840 | 359 | 122 | 1,321 | 3,020 | 70 | 3,090 | |
| Bobcaygeon | D.G.A. | 2021 - 2026 | 198 | 62 | 20 | 280 | 660 | (40) | 620 |
| | | 2021 - 2031 | 404 | 102 | 17 | 524 | 1,260 | (30) | 1,230 |
| | | 2021 - 2036 | 615 | 101 | 34 | 750 | 1,820 | (30) | 1,800 |
| | | 2021 - 2041 | 772 | 231 | 52 | 1,055 | 2,500 | (10) | 2,490 |
| | | 2021 - 2046 | 1,060 | 340 | 120 | 1,520 | 3,550 | 20 | 3,570 |
| | | 2021 - 2051 | 1,179 | 368 | 147 | 1,694 | 3,950 | 50 | 4,000 |



| | Development Location | Timing | Single & Semi-Detached | Multiples ¹ | Apartments ² | Total Residential Units | Population | Existing Unit Population Change | Net Population Increase |
|------------------------|----------------------------------|-------------|------------------------|------------------------|-------------------------|-------------------------|------------|---------------------------------|-------------------------|
| | B.U.A. | 2021 - 2026 | 17 | 14 | 11 | 42 | 90 | (60) | 30 |
| | | 2021 - 2031 | 20 | 38 | 26 | 84 | 160 | (60) | 110 |
| | | 2021 - 2036 | 21 | 46 | 40 | 107 | 200 | (50) | 150 |
| | | 2021 - 2041 | 29 | 61 | 52 | 142 | 270 | (20) | 250 |
| | | 2021 - 2046 | 33 | 66 | 67 | 166 | 310 | 30 | 340 |
| | | 2021 - 2051 | 40 | 123 | 46 | 209 | 400 | 90 | 490 |
| | Total | 2021 - 2026 | 215 | 76 | 31 | 322 | 740 | (100) | 650 |
| | | 2021 - 2031 | 424 | 140 | 43 | 607 | 1,420 | (90) | 1,330 |
| | | 2021 - 2036 | 637 | 147 | 73 | 857 | 2,020 | (80) | 1,950 |
| | | 2021 - 2041 | 801 | 292 | 104 | 1,197 | 2,770 | (30) | 2,740 |
| | | 2021 - 2046 | 1,093 | 406 | 187 | 1,687 | 3,860 | 50 | 3,910 |
| | | 2021 - 2051 | 1,219 | 490 | 194 | 1,902 | 4,350 | 140 | 4,490 |
| Omemeë | D.G.A. | 2021 - 2026 | 30 | 4 | 2 | 37 | 90 | (10) | 80 |
| | | 2021 - 2031 | 73 | 34 | 6 | 113 | 260 | (10) | 250 |
| | | 2021 - 2036 | 56 | 40 | 11 | 108 | 240 | (10) | 230 |
| | | 2021 - 2041 | 140 | 58 | 17 | 215 | 500 | - | 490 |
| | | 2021 - 2046 | 163 | 76 | 24 | 263 | 600 | 10 | 610 |
| | | 2021 - 2051 | 165 | 78 | 24 | 266 | 610 | 20 | 620 |
| | B.U.A. | 2021 - 2026 | 1 | 1 | 3 | 5 | 10 | (20) | (10) |
| | | 2021 - 2031 | 1 | 4 | 7 | 12 | 20 | (20) | - |
| | | 2021 - 2036 | 3 | 6 | 10 | 19 | 30 | (20) | 10 |
| | | 2021 - 2041 | 4 | 8 | 13 | 25 | 40 | (10) | 40 |
| | | 2021 - 2046 | 4 | 9 | 17 | 31 | 50 | 10 | 70 |
| | | 2021 - 2051 | 7 | 18 | 23 | 48 | 90 | 40 | 120 |
| | Total | 2021 - 2026 | 32 | 6 | 5 | 42 | 100 | (40) | 60 |
| | | 2021 - 2031 | 75 | 38 | 12 | 125 | 280 | (30) | 250 |
| | | 2021 - 2036 | 59 | 46 | 21 | 126 | 270 | (30) | 240 |
| | | 2021 - 2041 | 144 | 65 | 30 | 240 | 540 | (10) | 530 |
| | | 2021 - 2046 | 168 | 85 | 41 | 293 | 650 | 20 | 670 |
| | | 2021 - 2051 | 172 | 95 | 47 | 314 | 690 | 50 | 750 |
| MZO1 - Bromont | Outside Settlement Area Boundary | 2021 - 2026 | - | - | - | - | - | - | - |
| | | 2021 - 2031 | - | 116 | 20 | 136 | 250 | - | 250 |
| | | 2021 - 2036 | 550 | 450 | 45 | 1,045 | 2,340 | - | 2,340 |
| | | 2021 - 2041 | 600 | 550 | 170 | 1,320 | 2,840 | - | 2,840 |
| | | 2021 - 2046 | 600 | 675 | 185 | 1,460 | 3,100 | - | 3,100 |
| | | 2021 - 2051 | 700 | 900 | 270 | 1,870 | 3,910 | - | 3,910 |
| MZO2 - Flato | Outside Settlement Area Boundary | 2021 - 2026 | - | - | - | - | - | - | - |
| | | 2021 - 2031 | - | - | - | - | - | - | - |
| | | 2021 - 2036 | 500 | 800 | 200 | 1,500 | 3,110 | - | 3,110 |
| | | 2021 - 2041 | 700 | 800 | 200 | 1,700 | 3,620 | - | 3,620 |
| | | 2021 - 2046 | 1,300 | 900 | 300 | 2,500 | 5,500 | - | 5,500 |
| | | 2021 - 2051 | 1,500 | 950 | 300 | 2,750 | 6,110 | - | 6,110 |
| City of Kawartha Lakes | D.G.A. | 2021 - 2026 | 1,522 | 416 | 197 | 2,135 | 5,000 | (290) | 4,710 |
| | | 2021 - 2031 | 3,672 | 1,136 | 578 | 5,387 | 12,460 | (270) | 12,190 |
| | | 2021 - 2036 | 5,593 | 2,024 | 1,118 | 8,735 | 19,880 | (230) | 19,650 |
| | | 2021 - 2041 | 7,016 | 2,887 | 1,727 | 11,630 | 26,080 | (90) | 25,990 |
| | | 2021 - 2046 | 8,154 | 3,780 | 2,401 | 14,335 | 31,700 | 160 | 31,860 |
| | | 2021 - 2051 | 9,068 | 4,085 | 2,946 | 16,098 | 35,430 | 420 | 35,860 |
| | B.U.A. | 2021 - 2026 | 131 | 139 | 273 | 542 | 1,000 | (330) | 670 |



| | Development Location | Timing | Single & Semi-Detached | Multiples ¹ | Apartments ² | Total Residential Units | Population | Existing Unit Population Change | Net Population Increase |
|-------------|--------------------------------|-------------|------------------------|------------------------|-------------------------|-------------------------|------------|---------------------------------|-------------------------|
| | | 2021 - 2031 | 142 | 379 | 652 | 1,173 | 2,040 | (310) | 1,730 |
| | | 2021 - 2036 | 153 | 571 | 992 | 1,716 | 2,940 | (270) | 2,670 |
| | | 2021 - 2041 | 192 | 768 | 1,303 | 2,262 | 3,870 | (110) | 3,780 |
| | | 2021 - 2046 | 223 | 945 | 1,669 | 2,837 | 4,820 | 180 | 5,020 |
| | | 2021 - 2051 | 248 | 1,751 | 2,314 | 4,313 | 7,370 | 490 | 7,900 |
| | Remaining Rural | 2021 - 2026 | 213 | - | - | 213 | 550 | (570) | (30) |
| | | 2021 - 2031 | 491 | - | - | 491 | 1,260 | (530) | 730 |
| | | 2021 - 2036 | 739 | - | - | 739 | 1,900 | (470) | 1,440 |
| | | 2021 - 2041 | 927 | - | - | 927 | 2,390 | (180) | 2,200 |
| | | 2021 - 2046 | 1,078 | - | - | 1,078 | 2,770 | 310 | 3,090 |
| | Total - City of Kawartha Lakes | 2021 - 2051 | 1,199 | - | - | 1,199 | 3,080 | 850 | 3,930 |
| | | 2021 - 2026 | 1,865 | 555 | 470 | 2,890 | 6,540 | (1,190) | 5,350 |
| | | 2021 - 2031 | 4,305 | 1,515 | 1,230 | 7,050 | 15,770 | (1,110) | 14,650 |
| | | 2021 - 2036 | 6,485 | 2,595 | 2,110 | 11,190 | 24,720 | (970) | 23,750 |
| | | 2021 - 2041 | 8,135 | 3,655 | 3,030 | 14,820 | 32,340 | (390) | 31,950 |
| 2021 - 2046 | | 9,455 | 4,725 | 4,070 | 18,250 | 39,300 | 650 | 39,950 | |
| | 2021 - 2051 | 10,515 | 5,835 | 5,260 | 21,610 | 45,890 | 1,760 | 47,650 | |

Notes:

- Low-density includes singles & semi-detached, and “other” households.
- Medium density includes townhouses and apartments in duplexes.
- High-density includes bachelor, 1 bedroom and 2 bedroom+ apartments.
- Figures have been rounded.

Source: 2021 derived from Statistics Canada Census, 2021, and 2021 to 2051 forecast by Watson & Associates Economists Ltd.



2.1.3 Employment Growth Allocations by Settlement Area (2023 – 2051)

Figure 6
City of Kawartha Lakes
Employment Growth Forecast Allocations, 2023 to 2051

| Settlement Area | P.R.E. | E.L.E. | Rural E.L.E. | Other Rural | Total |
|-----------------|--------|--------|--------------|-------------|--------|
| Lindsay | 8,790 | 2,700 | | 0 | 11,460 |
| Bobcaygeon | 1,010 | 30 | | 0 | 1,070 |
| Fenelon Falls | 950 | 290 | | 10 | 1,250 |
| Omemee | 120 | 160 | | 10 | 290 |
| MZOs | 1,030 | | | | 1,030 |
| Rural | 1,000 | | 780 | 250 | 2,030 |

Source: Watson & Associates Economists Ltd., 2024.



3. Residential and Employment Land Supply

3.1 Residential Supply by Status

Figure 7 and 8 summarize the City’s potential housing supply by development status. Key observations include the following:

- As of mid-2022, approximately 7,140 units were identified within the development approvals process (registered unbuilt, draft approved, and currently under review) across the City. Of these, most (86%) are in the City’s urban area, i.e., the D.G.A. and the B.U.A., and the remaining 14% of units in the approvals process are within the remaining Rural Areas.
- Kawartha Lakes’ active housing supply potential (proposed housing in active applications) is geared towards low-density housing, accounting for 83% of the overall supply, while medium-density units account for 14%, and high-density units account for 3% of the total housing supply in the active approvals process.

Figure 7
City of Kawartha Lakes
Residential Supply in Approvals Process

| Status | Low Density ^[1] | Medium Density ^[2] | High Density ^[3] | Total |
|---|----------------------------|-------------------------------|-----------------------------|--------------|
| Final Approved | 2,021 | 27 | 112 | 2,160 |
| Draft Approved | 1,300 | 394 | 56 | 1,750 |
| In Review | 2,613 | 558 | 57 | 3,228 |
| Total | 5,934 | 979 | 225 | 7,138 |
| Share of Housing Units by Structure Type | 83% | 14% | 3% | 100% |

^[1] Includes single and semi-detached units.

^[2] Includes townhouses and apartments in duplexes.

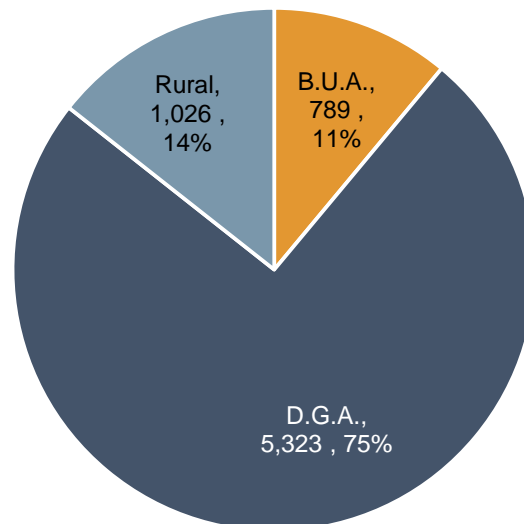
^[3] Includes bachelor, 1-bedroom, and 2-bedroom+ apartments.

Source: Data as of June 2022 from the City of Kawartha Lakes by Watson & Associates Economists Ltd., 2024.



Figure 8
City of Kawartha Lakes
Residential Supply in Active Approvals Process

| Settlement Area | Policy Area | Low Density | Medium Density | High Density | Total |
|--------------------------------|-------------|-------------|----------------|--------------|-------|
| Lindsay | B.U.A. | 247 | 167 | 238 | 652 |
| | D.G.A. | 3,614 | 742 | 295 | 4,651 |
| Bobcaygeon | B.U.A. | | | | - |
| | D.G.A. | 610 | 40 | 22 | 672 |
| Fenelon Falls | B.U.A. | | 61 | 46 | 107 |
| | D.G.A. | | | | - |
| Omemmee | B.U.A. | | 30 | | 30 |
| | D.G.A. | | | | - |
| Total – City of Kawartha Lakes | B.U.A. | 247 | 258 | 284 | 789 |
| | D.G.A. | 4,224 | 782 | 317 | 5,323 |

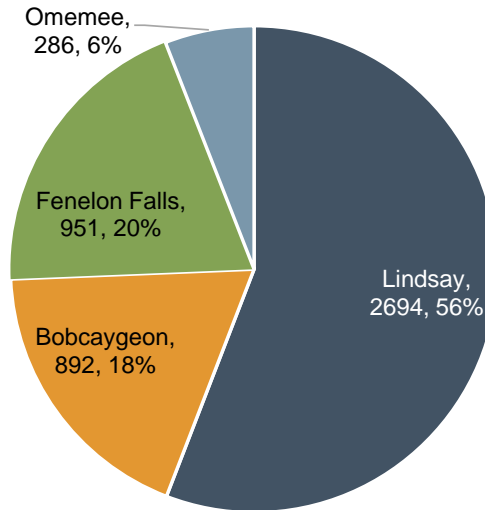


Note: Built-up Area (B.U.A.); Designated Growth Area (D.G.A.)
Source: Data as of June 2022 from the City of Kawartha Lakes by Watson & Associates Economists Ltd., 2024.

The remaining vacant designated residential land supply outside of active development applications (inside the urban boundary) totals approximately 190 gross hectares and has an expected development yield of 4,820 units. Of these, about 1,700 units (32%) are in the B.U.A., while the remaining units are within the D.G.A. Figure 9 shows the distribution of vacant lands by Settlement Area. As shown in the figure, over half the total vacant land supply is in Lindsay, followed by Fenelon Falls and Bobcaygeon. Omemmee has about 6% of the overall vacant land supply potential.



Figure 9
City of Kawartha Lakes
Urban Residential Supply on Vacant Lands

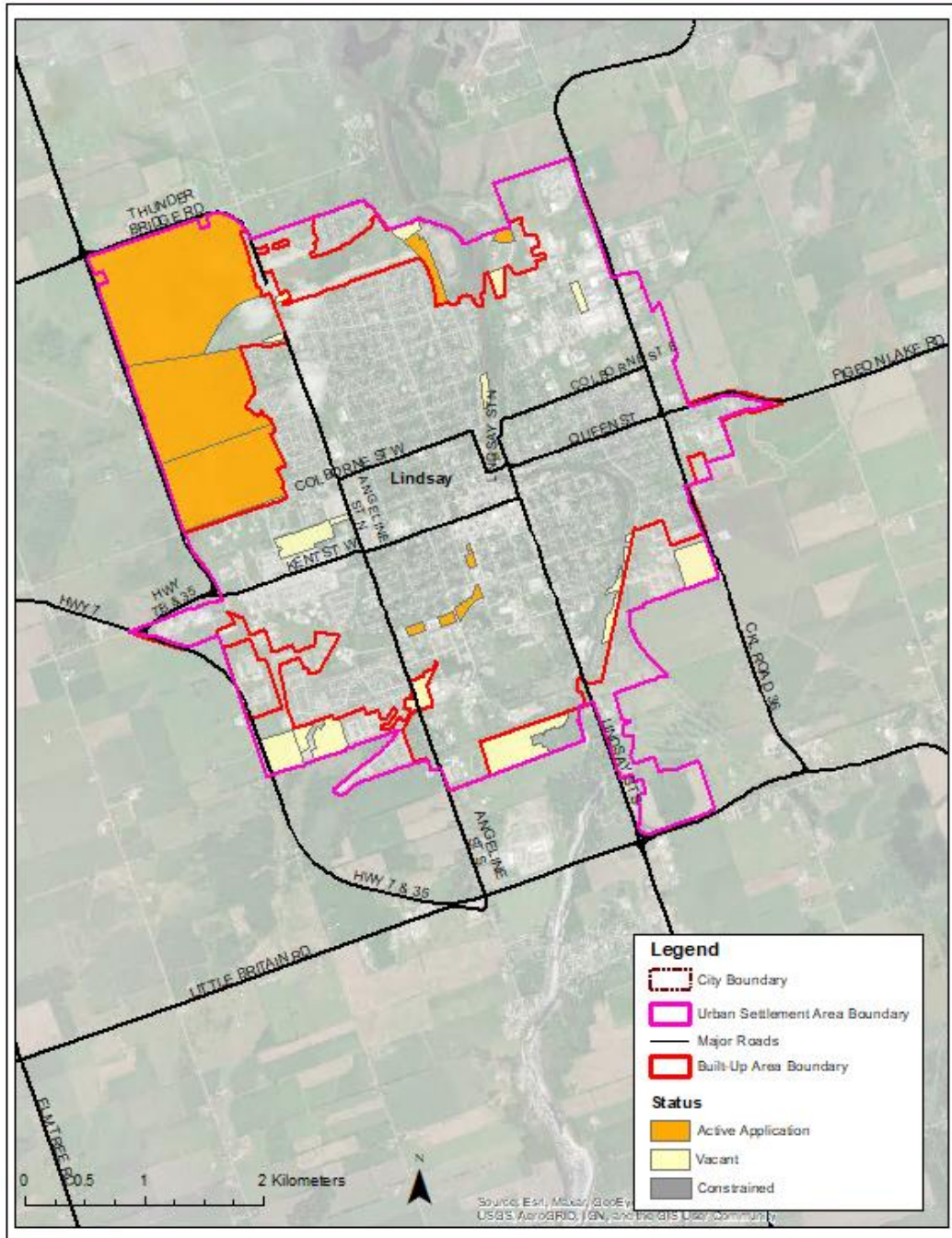


| Settlement Area | Policy Area | Area Gross Ha | Gross - Net % | Net Area (Ha) | Area Share | | | Net Area (ha) | | | DENSITY | | | Unit Yield | | | |
|----------------------|-------------|---------------|---------------|---------------|-------------|-------------|--------------|---------------|-------------|--------------|-------------|-------------|--------------|------------|-------|-------|-------|
| | | | | | Low Density | Med Density | High Density | Low Density | Med Density | High Density | Low Density | Med Density | High Density | Total | | | |
| Lindsay | BUA | 18 | 85% | 15 | 35% | 25% | 40% | 5 | 4 | 6 | 35 | 55 | 130 | 187 | 210 | 796 | 1,193 |
| | DGA | 57 | 60% | 34 | 60% | 30% | 10% | 20 | 10 | 3 | 30 | 45 | 125 | 614 | 460 | 426 | 1,501 |
| | Total | 106 | | 68 | | | | 26 | 22 | 21 | | | | 801 | 1,083 | 2,570 | 2,694 |
| Bobcaygeon | BUA | 3 | 90% | 3 | 35% | 30% | 35% | 1 | 1 | 1 | 35 | 50 | 100 | 33 | 41 | 95 | 168 |
| | DGA | 39 | 55% | 21 | 65% | 30% | 5% | 14 | 6 | 1 | 25 | 45 | 80 | 349 | 290 | 86 | 724 |
| | Total | 42 | | 24 | | | | 15 | 7 | 2 | | | | 382 | 330 | 180 | 892 |
| Fenelon Falls | BUA | 4 | 90% | 4 | 35% | 40% | 25% | 1 | 1 | 1 | 25 | 45 | 90 | 32 | 65 | 81 | 177 |
| | DGA | 42 | 55% | 23 | 70% | 20% | 10% | 16 | 5 | 2 | 25 | 40 | 80 | 404 | 185 | 185 | 774 |
| | Total | 46 | | 27 | | | | 17 | 6 | 3 | | | | 436 | 250 | 266 | 951 |
| Omemee | BUA | | | 0 | 70% | 30% | 0% | 0 | 0 | 0 | 20 | 45 | 70 | - | - | - | - |
| | DGA | 26 | 50% | 13 | 80% | 20% | 0% | 10 | 3 | 0 | 20 | 30 | 50 | 208 | 78 | - | 286 |
| | Total | 26 | | 13 | | | | 10 | 3 | 0 | | | | 208 | 78 | - | 286 |
| Kawartha Lakes Total | | 220 | | 132 | | | | 69 | 37 | 26 | | | | 1,827 | 1,740 | 3,016 | 4,823 |

Source: Data as of June 2022 from the City of Kawartha Lakes by Watson & Associates Economists Ltd., 2024.



Figure 10
City of Kawartha Lakes
Vacant Designated Residential Lands – Lindsay



Note: The above map represents active application data as of 2022, and does not show lands under active approvals process included within M.Z.O.



Figure 11
City of Kawartha Lakes
Vacant Designated Residential Lands – Fenelon Falls

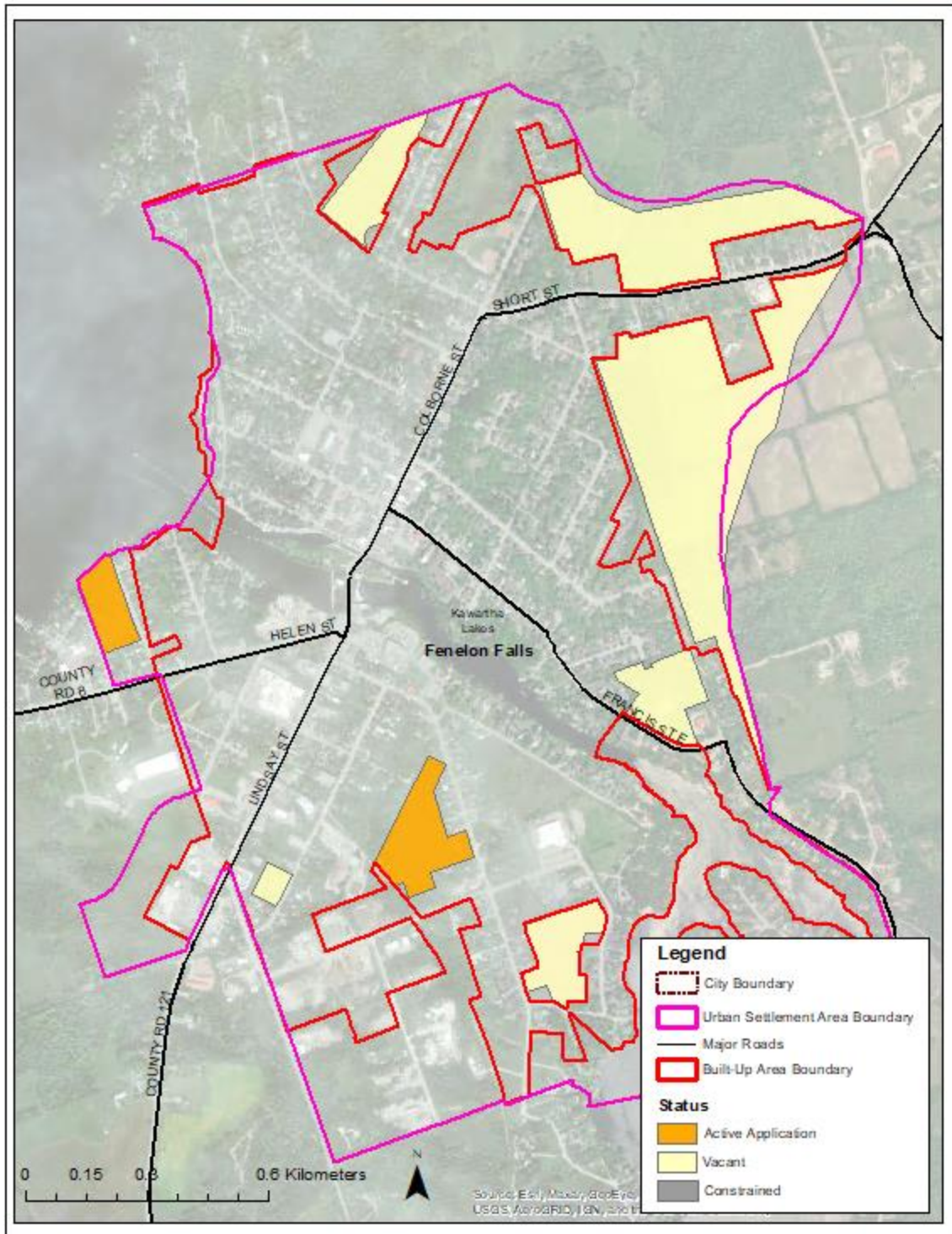




Figure 12
City of Kawartha Lakes
Vacant Designated Residential Lands – Bobcaygeon

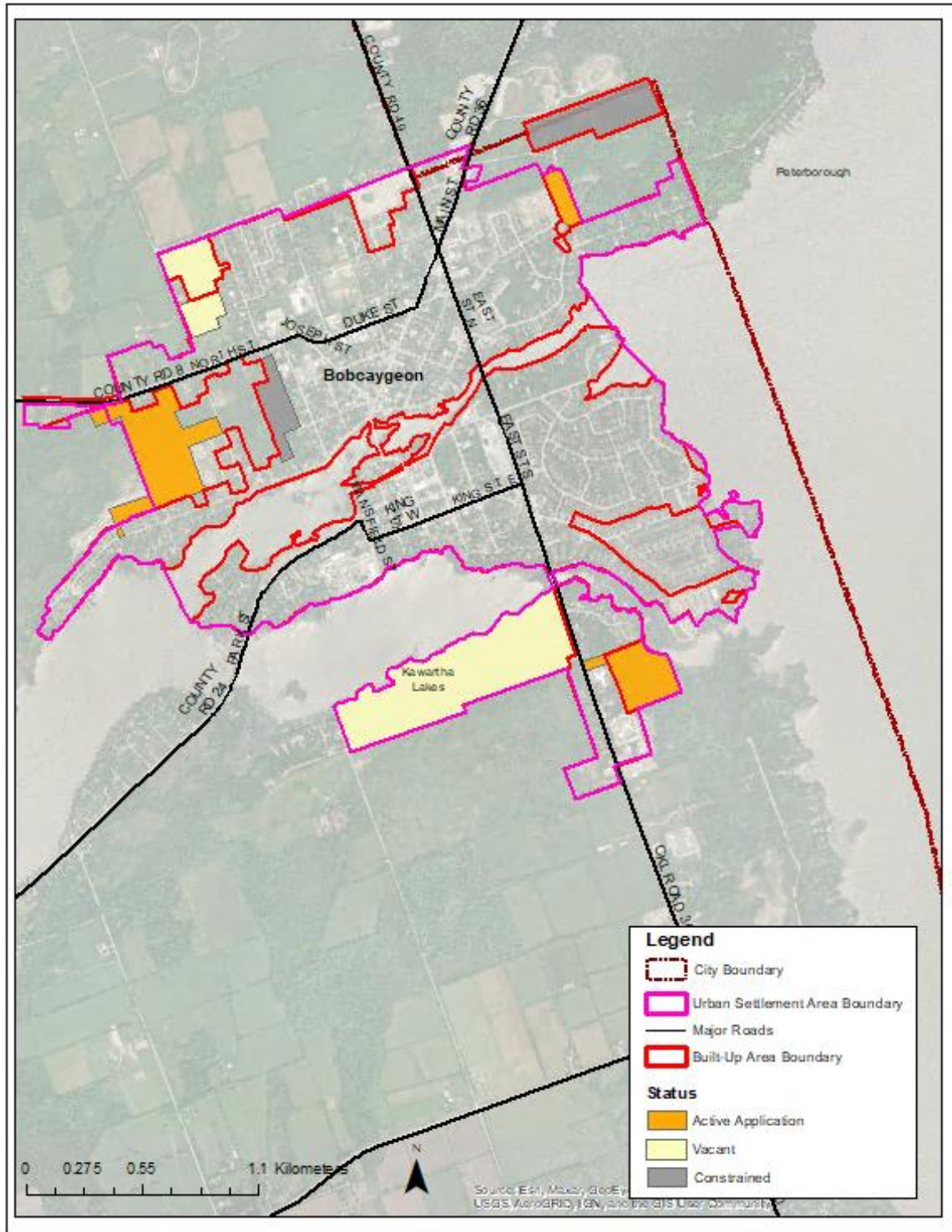
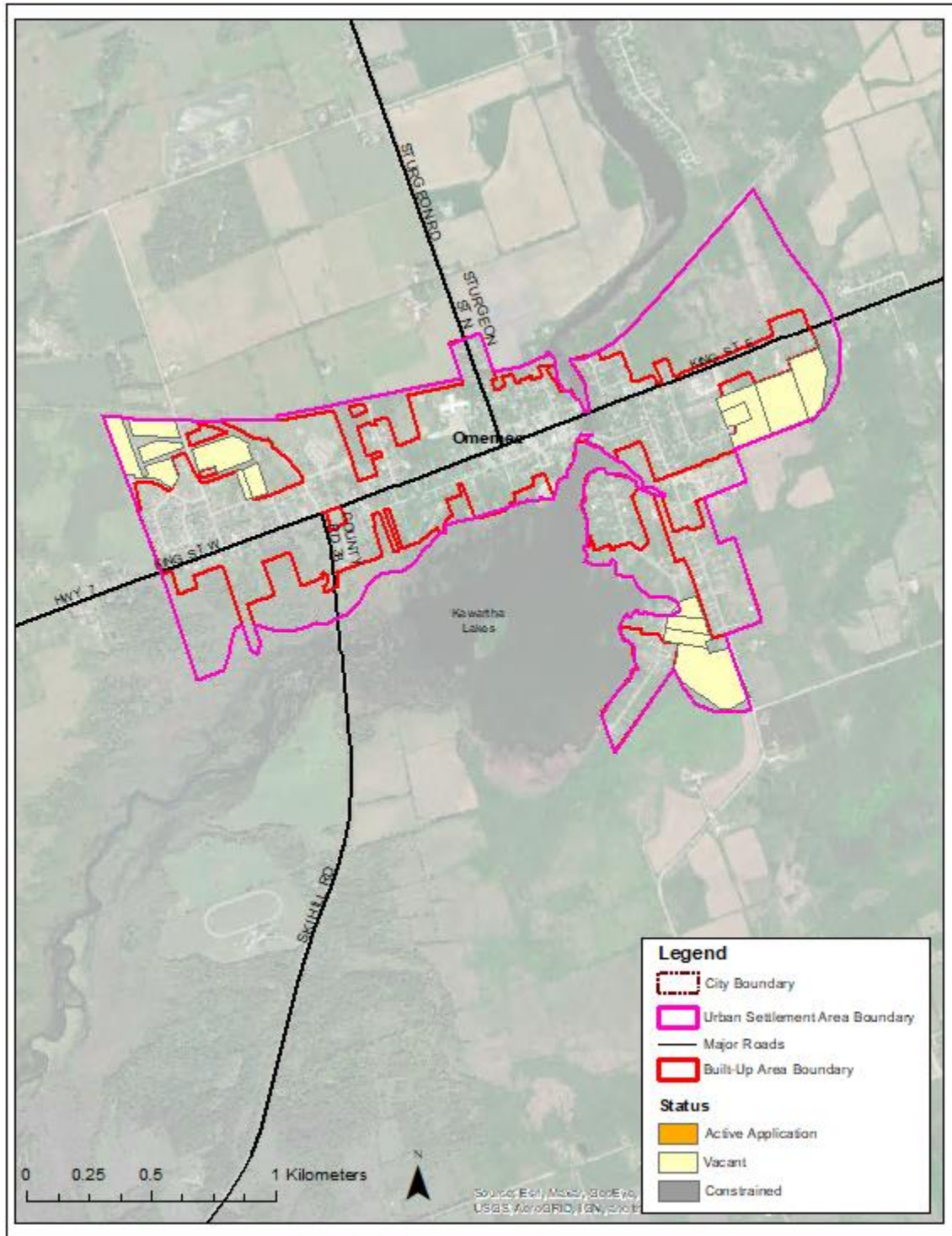




Figure 13
City of Kawartha Lakes
Vacant Designated Residential Lands – Omeme





3.1.1 Minister's Zoning Orders and Potential Urban Expansion Areas

Section 47 of the *Planning Act* allows the Ministry of Municipal Affairs and Housing to make M.Z.O.s, to govern land uses within areas subject to the order. An M.Z.O. prevails over any other zoning by-law in effect in the area, giving the Minister complete authority to regulate land use on specific lands. The City of Kawartha Lakes has received two M.Z.O.s which are located both within and outside the Settlement Area of Lindsay (refer to Figure 14 **Error! Reference source not found.**), including:

- Bromont Homes Inc. and Melody Garden Inc. for development of approximately 2,200 housing units covering an area of roughly 130 hectares towards the southern end of the Settlement Area of Lindsay; and
- Flato Developments for development of approximately 3,400 housing units covering an area of roughly 180 hectares located east of the Settlement Area boundary of Lindsay.

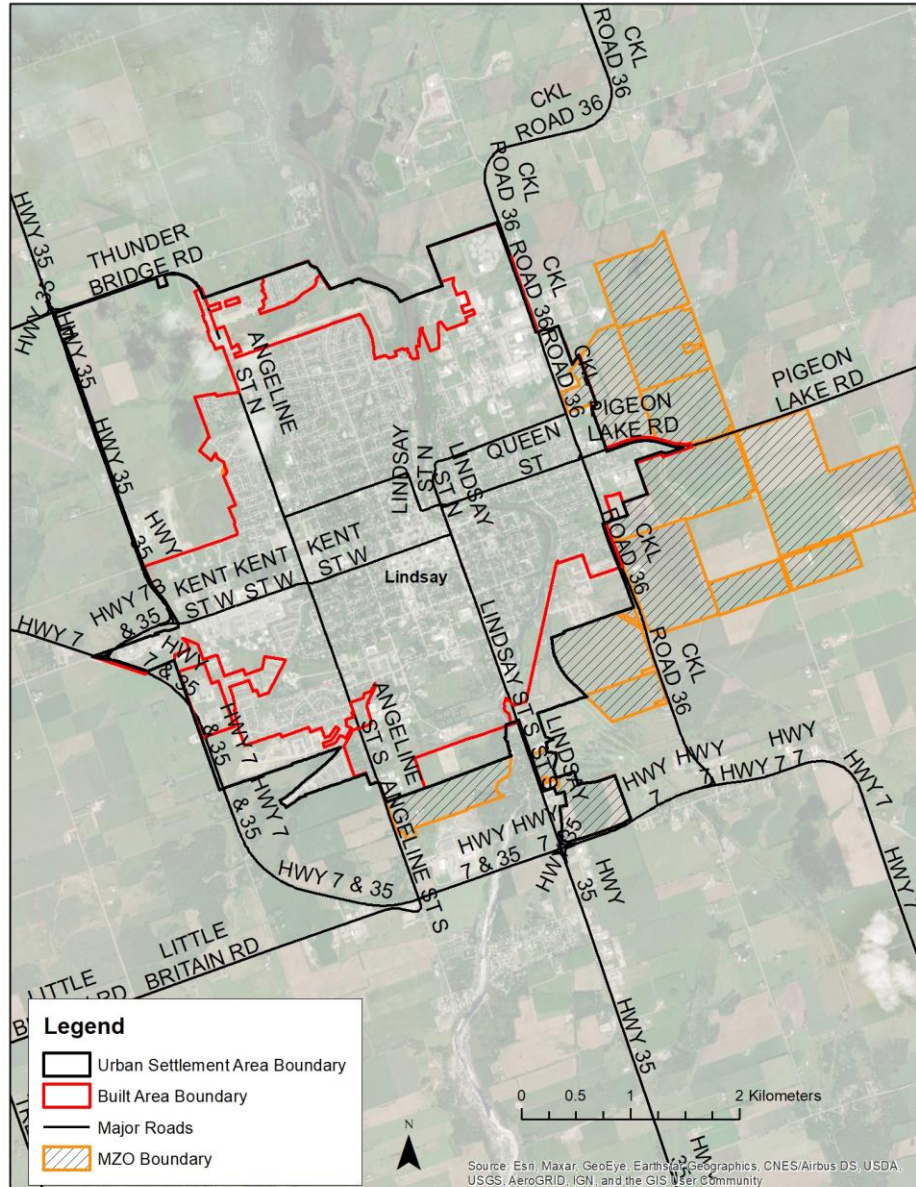
Figure 14
City of Kawartha Lakes
Proposed Area and Units Under Minister's Zoning Order (M.Z.O.)

| M.Z.O. | Units | Area (hectares) |
|----------------------|---------------|-----------------|
| Flato 1 | 4,340 | 115 |
| Flato 2 | | 65.5 |
| Flato 3 | | 69.5 |
| Flato 4 | 4,000 | 202 |
| Flato – Total | 8,340 | 452 |
| Bromont | 2,250 | 144 |
| Total | 10,590 | 596 |

Source: Data as of April 2023 from the City of Kawartha Lakes by Watson & Associates Economists Ltd., 2024.



Figure 15
City of Kawartha Lakes
Extent of Lands Under Minister's Zoning Order (M.Z.O.)



Source: Data as of April 2023 from the City of Kawartha Lakes by Watson & Associates Economists Ltd., 2024.



3.2 Employment Lands Supply

As illustrated in Figure 16, Kawartha Lakes has a total of 96 gross hectares (237 gross acres) of vacant designated employment land. The gross land area reflects reductions for environmental features identified as the Environmental Constraint Area in the City's O.P.

In determining the net employment lands, larger vacant parcels (i.e., 4 hectares or greater) that are not subdivided were subject to an additional downward adjustment to reflect internal infrastructure (i.e., roads, stormwater ponds, easements, etc.) with a net to gross adjustment of 75%. In accordance with these adjustments for internal infrastructure, designated vacant employment lands in the City of Kawartha Lakes are estimated at 88 net hectares (217 net acres).

Long-term land vacancy (i.e., vacant industrial parcels) is a common characteristic which is experienced in mature industrial parks throughout Ontario, including those within the City of Kawartha Lakes. Typically, as employment lands are brought to market, the more marketable and developable sites absorb first. Often, the remaining less-marketable sites are fragmented throughout the Employment Area, which can limit their potential for larger-scale development. Invariably, many of these sites remain vacant over the longer term, due to their limited market choice for end users. While these observations largely apply to more mature Employment Areas, over time, it is foreseeable that the City's newer Employment Areas will also begin to exhibit these characteristics. Accordingly, additional reductions to the net developable vacant employment land supply have been made to account for long-term land vacancy. This adjustment accounts for sites that are unlikely to develop over the long term due to odd/small lot sizes and poor configuration, unfavorable site conditions (e.g., low-lying areas prone to flooding), underutilized employment sites, and site inactivity/land banking, which may tie up potentially vacant and developable lands.

For this analysis, an estimate of approximately 15% long-term land vacancy has been used (i.e., total net vacant land area multiplied by 15%). Adjusted for land vacancy, Kawartha Lakes' net developable vacant employment land supply is approximately 74 net hectares (183 net acres).



Figure 16
City of Kawartha Lakes
Vacant Designated Employment Lands (hectares), 2023

| Employment Area | Total Gross Land Area Adjusted for Environmental Constraints (A) | Adjustment for Roads and Other Internal Infrastructure ^[1] (B) | Net Developable Employment Land Supply (C = A - B) | Net Developable Employment Land with Vacancy Adjustment ^[2] (D = C*0.85) |
|-------------------------------|---|--|---|--|
| Lindsay | 80.7 | 8.7 | 72.0 | 61.2 |
| Fenelon Falls | 11.6 | 0.0 | 11.6 | 9.9 |
| Bobcaygeon | 0.3 | 0.0 | 0.3 | 0.3 |
| Omeme | 3.6 | 0.0 | 3.6 | 3.1 |
| City of Kawartha Lakes | 96.2 | 8.7 | 87.5 | 74.4 |

^[1] Downward adjustment of 25% of the gross area (after environmental take-outs) has been applied to account for internal infrastructure on parcels greater than 4 hectares.

^[2] Assumes a land vacancy adjustment of 15%.

Source: Watson & Associates Economists Ltd., 2023.



Figure 17
City of Kawartha Lakes
Vacant Designated Employment Lands – Lindsay

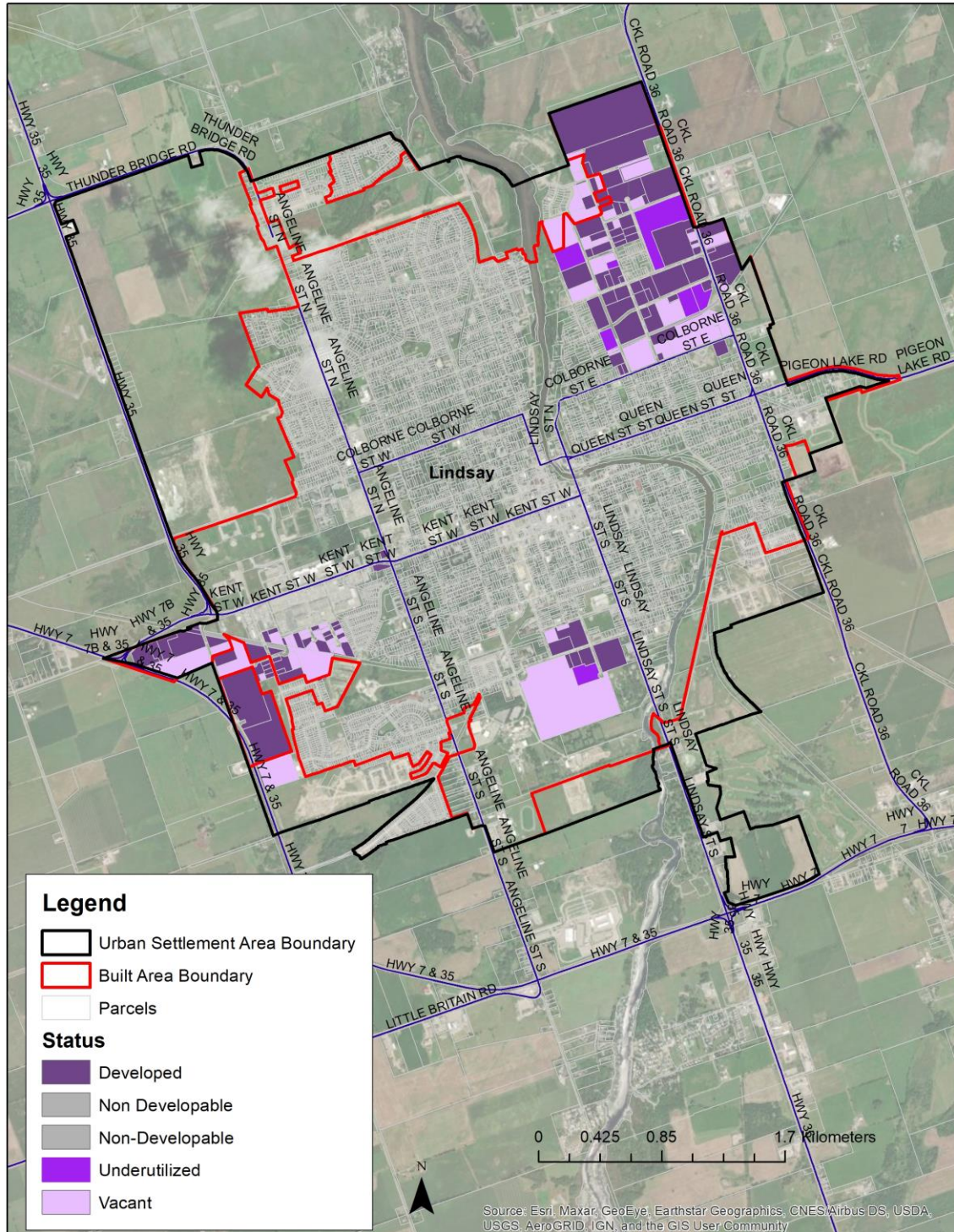




Figure 18
City of Kawartha Lakes
Vacant Designated Employment Lands – Fenelon Falls

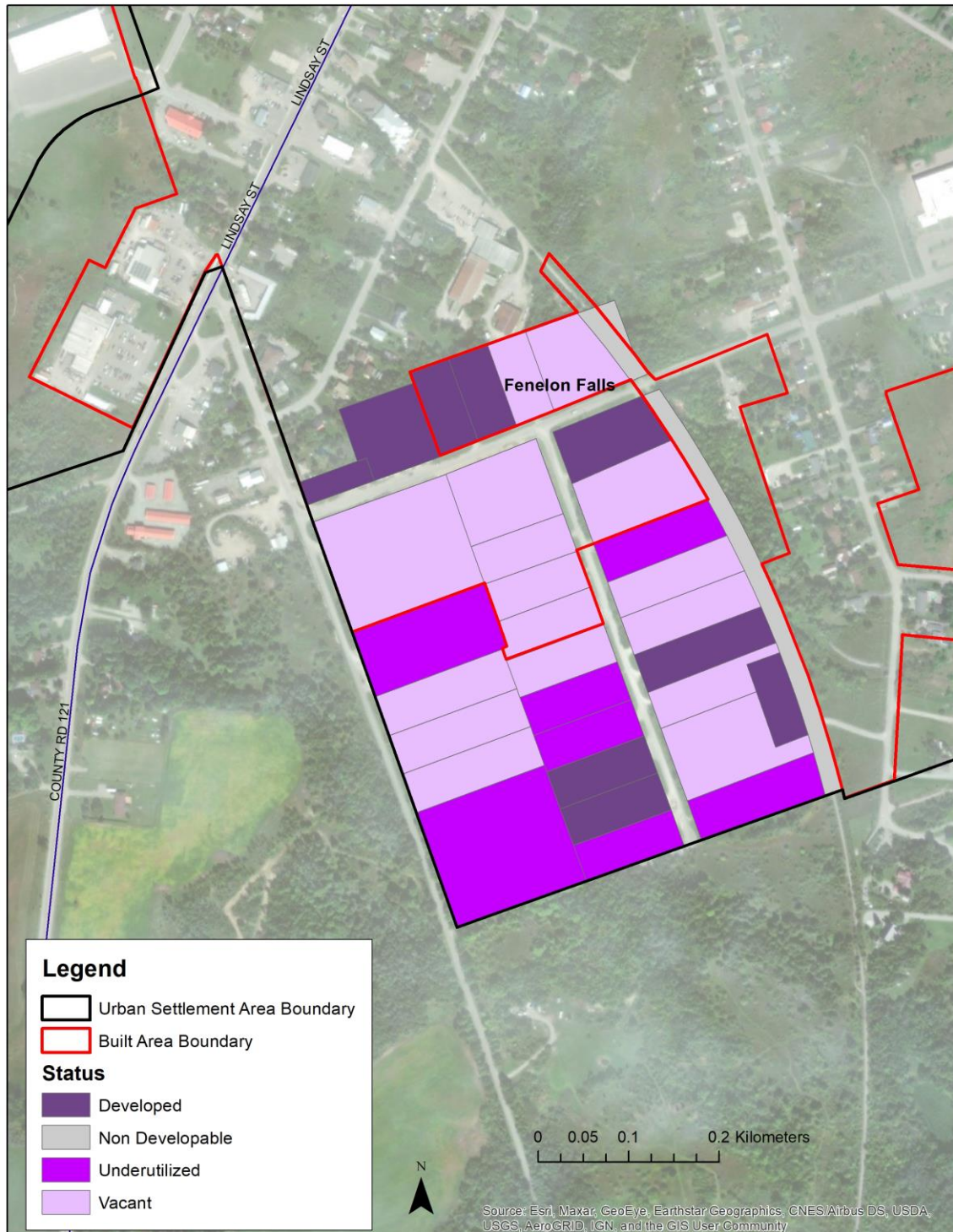
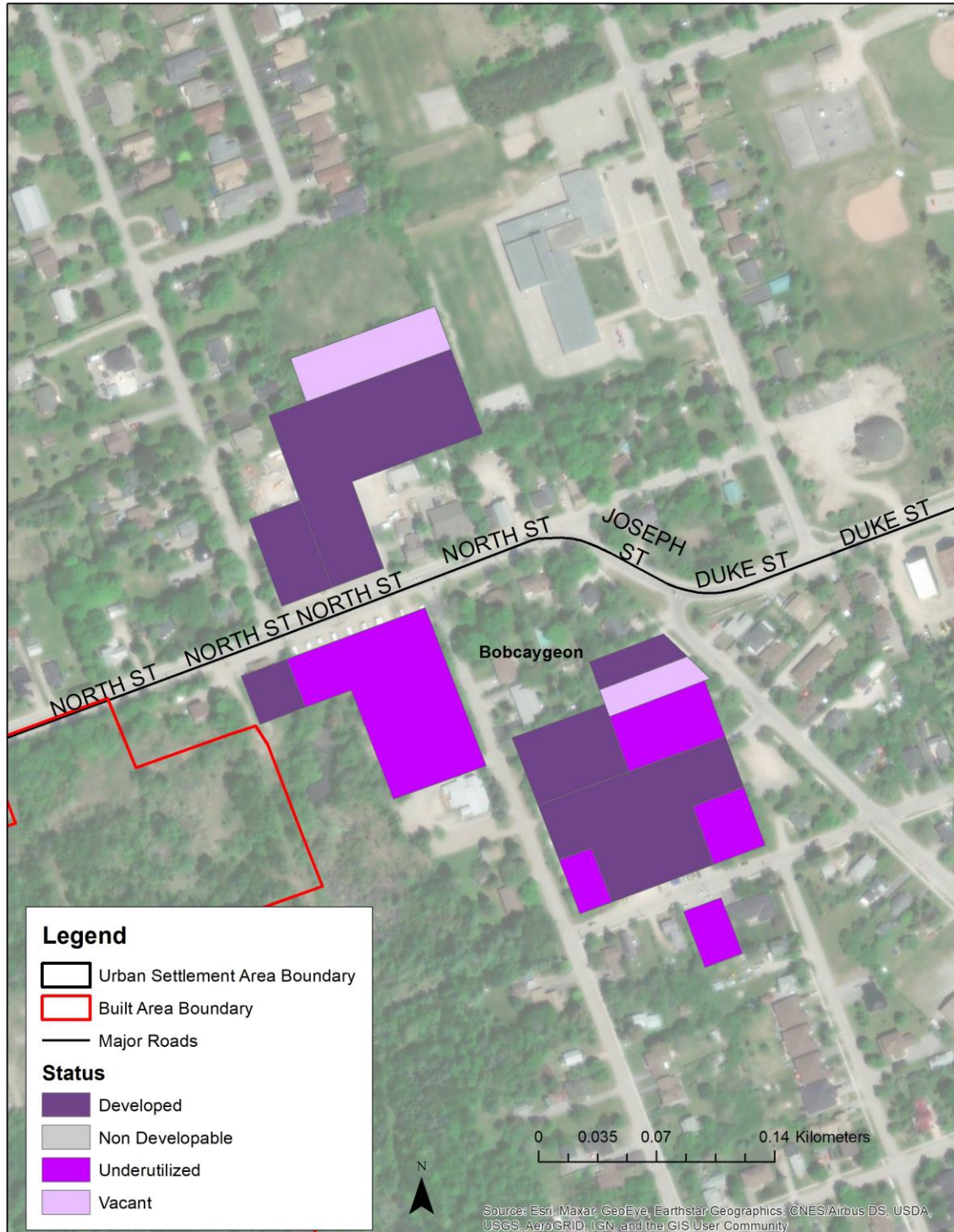




Figure 19
City of Kawartha Lakes
Vacant Designated Employment Lands – Bobcaygeon





3.3 Observations

The City of Kawartha Lakes has a significant supply of housing units in active applications and vacant designated residential greenfield lands, as well as additional future housing potential associated with the M.Z.O.s. Housing supply potential is relatively concentrated in the Settlement Area of Lindsay. With respect to urban Employment Areas, the vacant land supply is largely concentrated in Lindsay with the remaining areas having a smaller share of vacant employment lands.



4. Community Area and Employment Land Needs

4.1 Community Area Land Needs Analysis

Figures 20 and 21 summarize the Community Area land needs in the City of Kawartha Lakes. Key observations are as follows:

- As previously noted, the City is forecast to accommodate a population base in the D.G.A. of 42,000, plus approximately 4,300 jobs (total of 46,300 people and jobs), by 2051.
- The City is anticipated to achieve a density of 45 people and jobs per gross hectare by 2051, based on a review of existing development, approved development applications, and anticipated long-term development trends on vacant D.G.A. lands.
- The D.G.A. has a supply of 1,349 gross hectares of developable land (including M.Z.O.s), which is greater than the land requirement of 1,030 gross hectares to accommodate 46,300 people and jobs. As a result, the City is estimated to have a surplus of Community Area land of approximately 318 gross hectares by 2051.
- The Settlement Area of Lindsay (including approved M.Z.O.s) and Omemee have a Community Area surplus of about 329 hectares and 50 hectares respectively to 2051. As previously noted, it is recognized that the urban land supply surplus in Lindsay is driven largely by the approved M.Z.O.s, which have been included in the urban lands inventory (refer to Figure 21).
- While the City has a sufficient supply of D.G.A. lands at an aggregate level, localized Community Area land supply deficits exist in Fenelon Falls and Bobcaygeon of 38 hectares and 23 hectares, respectively, by the year 2051.



Figure 20
City of Kawartha Lakes
Community Area Land Needs to 2051

| - | Lindsay | Fenelon Falls | Bobcaygeon | Omeme | City of Kawartha Lakes |
|---|------------|---------------|------------|-----------|------------------------|
| Forecast Population and Jobs in City's D.G.A. in 2051 | 36,770 | 3,860 | 4,870 | 750 | 46,280 |
| Total D.G.A. Area in Hectares (including M.Z.O.s) | 1,105 | 64 | 106 | 75 | 1,349 |
| Density Target (people and jobs per hectare) | 47 | 38 | 38 | 30 | 45 |
| D.G.A. Land Demand to Achieve 45 People and Jobs per Hectare (hectares) | 776 | 102 | 128 | 25 | 1,030 |
| D.G.A. Land Needs (hectares) | 329 | -38 | -23 | 50 | 318 |

Note: Figures have been rounded and may not add up precisely. D.G.A. means Designated Growth Area; M.Z.O. means Minister's Zoning Order.
Source: Watson & Associates Economists Ltd., 2024.

Figure 21
City of Kawartha Lakes (Lindsay)
Community Area Land Needs to 2051 –
Including and Excluding M.Z.O.s

| - | - | Lindsay |
|--|-------------|-------------|
| D.G.A. Population in 2051 | A | 33,250 |
| Number of D.G.A. Jobs in 2051 | B | 3,520 |
| Population and Jobs in 2051 | $C = A + B$ | 36,770 |
| Total D.G.A. Area in Hectares (Excluding M.Z.O.s) | D | 541 |
| Density Target (people and jobs per hectare) | E | 47 |
| D.G.A. Land Demand (hectares) | $F = C/E$ | 776 |
| D.G.A. Land Needs (hectares) | $G = D - F$ | -235 |
| Additional Area Under M.Z.O.s Outside Settlement Area | H | 564 |
| Surplus D.G.A. Land Needs Including M.Z.O.s | $I = G + H$ | 329 |

Note: Figures have been rounded and may not add up precisely. D.G.A. means Designated Growth Area; M.Z.O. means Minister's Zoning Order.
Source: Watson & Associates Economists Ltd., 2024.



Figure 22
City of Kawartha Lakes (Lindsay)
Residential Unit Needs to 2051

| Lindsay DGA Lands | Units |
|--|---------------|
| Active Development Applications | 4,650 |
| Unit Potential on Vacant Greenfield Lands | 1,500 |
| Flato (MZO) | 8,340 |
| Bromont (MZO) | 2,250 |
| Total DGA Housing Unit Supply Potential | 16,740 |
| DGA Housing Demand – 2024 - 2051 | 12,700 |
| DGA Housing Surplus | 4,040 |



4.2 Employment Land Needs

As summarized in Figure 23, in accordance with the supply of vacant designated developable urban Employment Area lands compared against long-term demand, a small deficit of 2 net hectares or 3 gross hectares has been identified in Lindsay to 2051. It is estimated that by the buildout of existing D.G.A. lands, including all approved M.Z.O.s. in Lindsay (discussed further in Chapter 10), this deficit will increase to approximately 13 gross hectares. In accordance with the Employment Area removals analysis discussed in the previous section, approximately 28 hectares of currently vacant Employment Area land are recommended to be removed and redesignated to non-employment uses, resulting in a total Employment Area land need for Lindsay of approximately 41 gross hectares.

It is estimated that Fenelon Falls and Bobcaygeon will have a small deficit of Employment Area lands; however, a need for the expansion of Employment Area lands in these Settlement Areas has not been identified. It is recommended, however, that the City continue to regularly monitor the absorption and supply of Employment Area lands going forward.



Figure 23
City of Kawartha Lakes
Long-Term Employment Land Needs

| | Lindsay | Fenelon Falls | Bobcaygeon | Omemees | Total – City of Kawartha Lakes |
|---|---------|---------------|------------|---------|--------------------------------|
| Employment Area Land Required (hectares) | 64 | 10 | 2 | 3 | 79 |
| Vacant Employment Area Land (hectares) | 62 | 8 | 0 | 3 | 73 |
| Vacant Employment Area Land Need to 2051, Net Hectares | -2 | -3 | -1 | 1 | -6 |
| Vacant Employment Area Land Need to 2051, Gross Hectares | -3 | -3 | -2 | 1 | -7 |
| Additional Lands Needed in Lindsay to Buildout, Gross Hectares | -13 | - | - | - | - |
| Total Employment Area Land Need to Buildout (including removals) | - 41 | - | - | - | - |

Note: Numbers may not add due to rounding.
Source: Watson & Associates Economists Ltd., 2024.