

Memorandum

To	Chris Russell, Director of Planning and Development & Jennifer Staden, Manager of Planning Services, Township of Springwater
From	Adam Fischer, Manager, Watson & Associates Economists Ltd.
Date	January 8, 2026
Re:	Springwater Growth Management Strategy – Growth Forecast and Land Needs Analysis

Fax Courier Mail Email

1. Introduction

1.1 Terms of Reference

The primary objective of this assignment is to extend the population, housing and employment forecast for the Township of Springwater to 2056, based on the previously completed background work through Simcoe County Official Plan Amendment (SCOPA) 7. Further to this, an updated urban Community Area and Employment Area Land Needs analysis has been conducted to determine if the Township has a sufficient supply of urban land to accommodate forecast demand over the next 30 years.

1.2 Long-term Growth Forecast Approach

The population, housing, and employment forecasts for the Township of Springwater were developed using a combined “top-down” and “bottom-up” approach. This framework incorporates regional demographic trends and economic drivers while accounting for local housing market conditions.

Population forecasts are translated into household growth through an assessment of Persons Per Unit (P.P.U.), with a key assumption that the average P.P.U. will decline over time due to an aging population and smaller household sizes. Housing forecasts by structure type – singles/semi-detached, townhouses, and apartments – are informed by both demand factors (historical Census data, building activity, regional economic trends,



and market appeal) and supply factors (approved units in the development pipeline, infill opportunities, and vacant designated lands).

Employment forecasts are based on the activity rate method, refined with historical Census data and an assessment of economic drivers, with additional consideration of export-based and industrial employment sectors not directly tied to population growth. This approach provides a comprehensive and balanced approach to assessing and extending the SCOPA 7 forecast for Springwater to 2056.

The following are the key growth assumptions utilized in this growth analysis. Additional details are discussed in further sections of this memo:

- Growth forecast targets SCOPA 7 forecast to 2051, extending to 2056;
- Proposed intensification target is consistent with SCOPA 7, at 15%;¹
- Proposed Designated Growth Area (D.G.A.) density target is consistent with SCOPA 7, at 45 people & jobs per hectare;
- Proposed Employment Area density target has been adjusted downward from 20 jobs/ha to 15 jobs/hectare;
- Land need horizon is 30 years (2026 to 2056) for Community and Employment Areas. It is important to note that subsection 2.1.3 of the Provincial Planning Statement (P.P.S.) allows planning for Employment Areas to extend beyond this 30-year horizon.

¹ For the purpose of this analysis, intensification is defined as growth occurring within the Township's designated Built Up Area (B.U.A.) boundary. This approach provides a consistent basis to measure and monitor intensification activity, enabling comparisons with the SCOPA 7 targets, as well as intensification results achieved across other surrounding municipalities.



2. Drivers and Disruptors of Future Population Change in Simcoe County

Springwater is transitioning from a primarily rural, agricultural-based municipality into a growing community shaped by population influx, proximity to the Greater Golden Horseshoe (G.G.H.), and regional economic diversification. The Township benefits from its location adjacent to Barrie and within commuting distance of the Greater Toronto and Hamilton Area (G.T.H.A.), making it an attractive residential community with access to a broad regional employment base. While agriculture and resource-based sectors remain important, Springwater is also experiencing steady growth in construction, small-scale industrial, service-oriented, and home-based enterprises that support its expanding population.

Springwater's economy is shaped by broader regional trends across Simcoe County, where advanced manufacturing, logistics, healthcare, and agri-food sectors continue contributing to economic growth. The Township is attracting new households through steady residential development supported by investments in infrastructure and community amenities. With its balance of rural character, growing residential areas, and accessibility to a broad regional employment base, Springwater remains a desirable location for families, retirees, and commuters seeking both quality of life and proximity to larger urban settlements.

2.1 Macroeconomic Trends

2.1.1 *Navigating Increased Uncertainty in a Changing Global Economy*

The broader global economic environment remains uncertain, with ongoing geopolitical conflicts, trade tensions, inflationary pressures, and rising public and private debt creating headwinds for growth. The OECD has projected slower economic growth for Canada, with GDP expected to fall from 1.5% in 2024 to around 0.7% in 2025 and 2026. These conditions pose challenges for manufacturing-focused regions of Southern Ontario, where the automotive industry is undergoing structural changes tied to electrification and advanced technologies.

Like other local municipalities in the region, Springwater's growth outlook is shaped by these global forces. While local employment is not as heavily dependent on large-scale manufacturing, broader disruptions in goods-producing sectors influence commuting patterns, housing demand, and investment in export-based industries across Simcoe



County. At the same time, the shift toward a more service-oriented economy, accelerated by the pandemic, presents opportunities for Springwater to attract population and housing growth driven by remote and hybrid work arrangements.

2.1.2 Population Growth Drivers in Simcoe County and Implications for the Township of Springwater

Future growth in Springwater is closely tied to the economic strength and competitiveness of Simcoe County and the wider G.G.H. The County sits within the northern edge of the G.G.H. commuter-shed, extending household and labour market connections from Toronto through York Region to Barrie. Employment opportunities in Barrie, York Region, and across the G.T.H.A. are major drivers of in-migration to Springwater, particularly for young families and professionals seeking more affordable housing in a rural–urban setting.

Population growth has two key components: natural increase (i.e., births less deaths) and net migration. Net migration, especially intraprovincial (from one area of Ontario to Simcoe County) migration, has been the dominant driver of population growth in Simcoe County and its lower-tier municipalities over the past two decades. This trend is expected to continue, with Springwater expected to capture a share of the County's growth through planned community expansions, infill opportunities, and Settlement Area development.

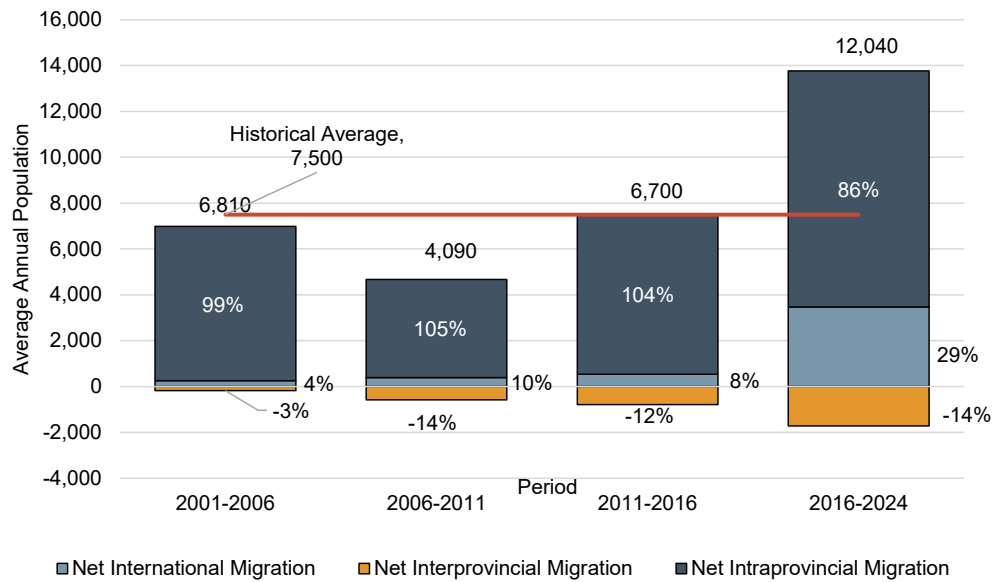
Figure 1 summarizes historical trends related to net migration for the Simcoe County Census Division (includes the City of Barrie and City of Orillia). Population change in the Census Division is, and is expected to continue to be heavily influenced by trends in net migration. The historical average net migration over the 2001 to 2024 period is approximately 7,500 persons annually. Since 2021, the Simcoe County Census Division has experienced a significant increase in population, primarily fueled by in-migration from areas within the province. The recent growth between 2021 and 2024 has averaged around 12,040 individuals annually.

While in-migration from other areas in the province has been a key contributor to Simcoe County's population increase, international immigration has also become an increasingly larger component of Simcoe's population growth. This trend in international migration is anticipated to moderate in the near term, as the federal government has introduced measures to cap non-permanent residents at 5 percent of the national



population by 2026 and to gradually lower permanent resident admission targets between 2025 and 2027.

Figure 1
Simcoe County Census Division (includes the City of Barrie and City of Orillia)
Components of Migration, 2001 to 2024



Source: Statistics Canada Census Data, compiled by Watson & Associates Economists Ltd., 2025.

2.2 Simcoe County Census Division – Ministry of Finance Projections

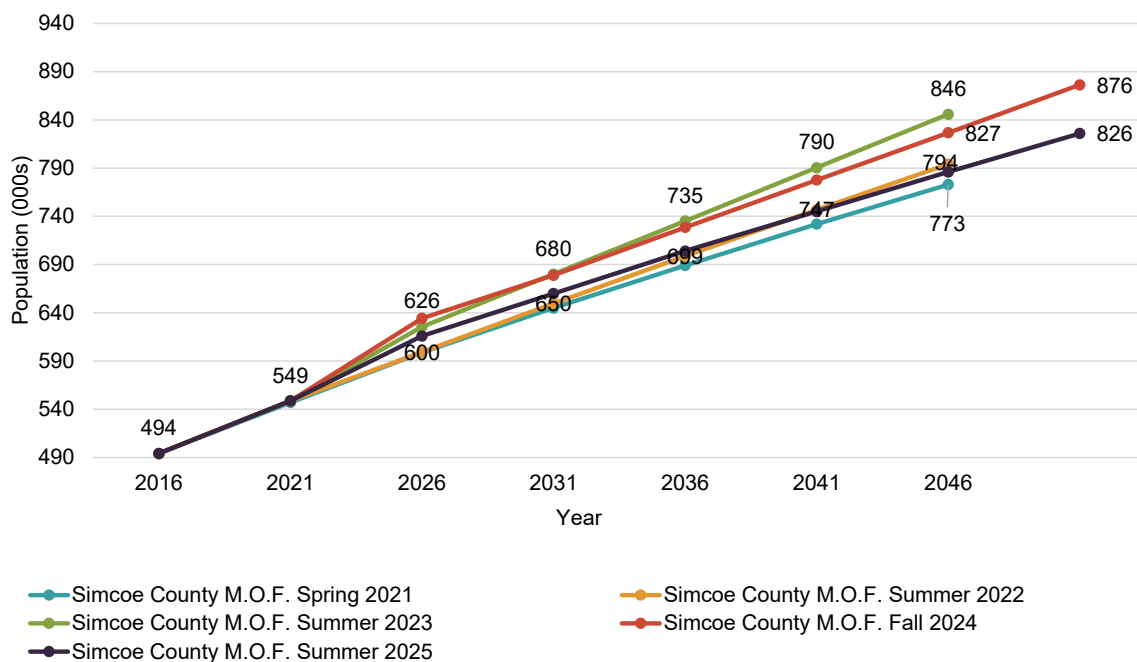
Figure 2 depicts the various projections prepared by the Ministry of Finance (M.O.F.) for Simcoe County Census Division between 2021 and 2025. Key findings are summarized below:

- According to the M.O.F. population projections from 2021 to 2023, the Simcoe County Census Division's long-term population forecast (to 2046) increased from 773,000 to 846,000. A similar trend was observed in the growth forecast outlook for the Province during this period.
- More recent 2024 and 2025 M.O.F. projections have decreased the growth outlook for the Simcoe Census Division slightly to 827,000 and 786,000, respectively, by 2046.



- The M.O.F. 2025 projections for the Simcoe Census Division are forecast at an annual growth rate of 1.4% between 2021 and 2051, or an increase of about 277,000 people over 30 years.
- It is noted that Schedule 3 of the 2020 Growth Plan forecast for the Census Division, which formed a basis for SCOPA 7, estimates a higher growth forecast for the County as a whole compared to the even highest projections for the Region according to M.O.F.¹ According to the Growth Plan, the Census Division is forecast to reach a population of 902,000 by 2051, compared to 826,000 in the 2025 M.O.F. forecast. Accordingly, it should be acknowledged that the SCOPA 7 projections for the County represent an ambitious growth outlook that exceeds the M.O.F. projections.

Figure 2
 Simcoe County Census Division (includes the City of Barrie and City of Orillia)
 Ministry of Finance Growth Forecast Comparison, 2021 to 2025



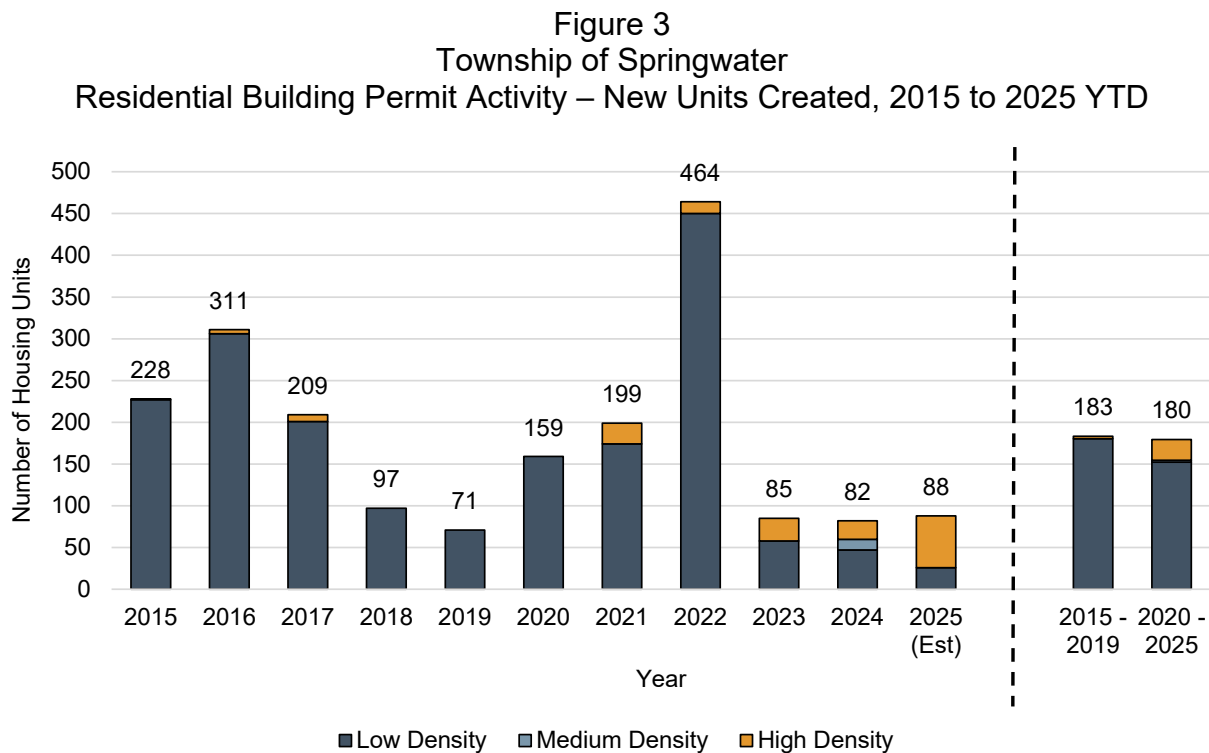
Source: M.O.F. Forecast Spring 2021 to Summer 2025, compiled by Watson & Associates Economists Ltd., 2025.

¹ Schedule 3 of the Growth Plan forecasts a total population of 555,000 for Simcoe County, 298,000 for the City of Barrie, and 49,000 for the City of Orillia by 2051.



2.3 Historical Building Permit Activity in Springwater

Figure 3 summarizes trends in historical residential building permit activity (new units only) for the Township of Springwater during the 2015 to 2024 period. Over this period, the Township of Springwater issued building permits to construct 180 new housing units annually. The most significant increase in residential building permit activity was in 2016 and 2022. The permit activity has decreased since 2022. This slowdown in building activity between 2023 and 2025 (year-to-date) has been observed in many other jurisdictions across Ontario. Despite this recent slowdown, housing development in Springwater is forecast to rebound over the long-term forecast horizon.



Notes: Low density includes single and semi-detached houses; Medium-density includes townhouses and apartments in duplexes; High-density includes bachelor, 1-bedroom and 2-bedroom+ apartments and Additional Residential Units.

Source: Building permit data from the Township of Springwater, presented by Watson & Associates Economists Ltd.



2.4 Active Development Applications

As summarized in Figure 4, the Township has the potential to accommodate approximately 13,400 housing units in active development applications, with 7,100 units in the draft approved and registered stage, and an additional 6,300 units that are under review, in progress or under M.Z.O. requests. The active applications offer a range of housing options, with a housing mix of 61% low density, 21% medium density and 18% high density.

Figure 4
Township of Springwater
Active Development Applications

Status	Low Density	Medium Density	High Density	Total
Registered	1,068	0	0	1,068
Registered / Draft Approved	885	0	0	885
Draft Approved	3,660	1,446	82	5,188
In Progress, OPA / ZBA Approved	2,416	518	358	3,292
MZO Request	96	915	1,969	2,980
Total	8,125	2,879	2,409	13,413
%	61%	21%	18%	100%

Source: Data from the Township of Springwater, summarized by Watson & Associates Economists, 2025.

While Springwater has approved a significant number of development applications, the pace of actual construction continues to be tied to infrastructure and servicing capacity. In particular, growth areas such as Midhurst require substantial water, wastewater, and transportation upgrades, many of which remain subject to regulatory and compliance approvals, as well as considerable capital costs, including confirmation of services/infrastructure readiness for the development to proceed.¹

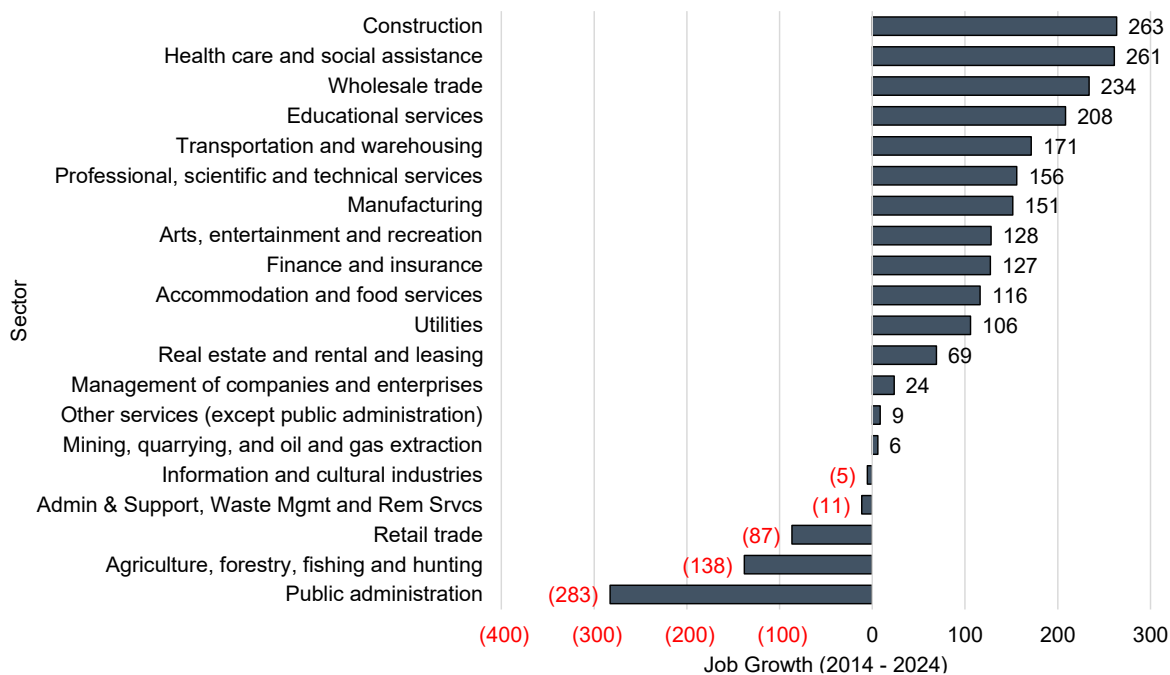
¹ <https://www.springwater.ca/en/business-and-development/current-development.aspx>



2.5 Non-Residential Growth Trends

Figure 5 summarizes employment growth by sector in Springwater by the number of jobs over the last decade. As illustrated, most employment sectors have seen an increase in the number of jobs, with the most significant increases in the sectors of Construction; Healthcare and Social Assistance; Wholesale Trade; and Education Services. Other industrial sectors, such as manufacturing and transportation/warehousing, have also grown in the Township.

Figure 5
Township of Springwater
Employment Growth, 2014 to 2024



2.6 Conclusions

As summarized above, a broad range of factors related to macro-economics, demographics, competitiveness, infrastructure investment, and federal immigration policy have, and will continue to influence the future population and employment potential of Simcoe County, including the Township of Springwater, over the next several decades. While it is important to understand these broad range of factors that can directly influence future population growth trends in Springwater, it is also



recognized that the Township has limited control regarding how these macro factors influence local growth and development trends when planning for the Township's future.

On the other hand, the Township does have considerable control over continuing to proactively manage long-term urban growth and change in a manner that continues to position Springwater positively over the long term. Addressing the interconnection between the Township's competitive economic position and its longer-term housing needs by market segment is critical in planning its future. This will help realize the Township's forecast population and employment growth potential.

Memorandum

3. Township of Springwater Long-Term Population and Housing Forecast, 2021 to 2056

This section explores the long-term population, housing, and employment growth potential for the Township of Springwater to 2056. As discussed previously, the 2051 growth forecast for the Township is consistent with and builds on SCOPA 7.

3.1 Township of Springwater Population Forecast, 2021 to 2056

This forecast represents the growth anticipated for the Township over the next 30 years. Figure 6 displays the 2025 Township of Springwater population forecast and provides the SCOPA 7 growth forecast for Springwater for comparative purposes.¹ As highlighted, the total population in the Township is expected to reach 32,500 by 2051 and 33,700 by 2056, representing an additional 1,170 people between 2051 and 2056. This forecast represents 11,050 people between 2021 and 2056, with an average annual growth rate of 1.2%.²

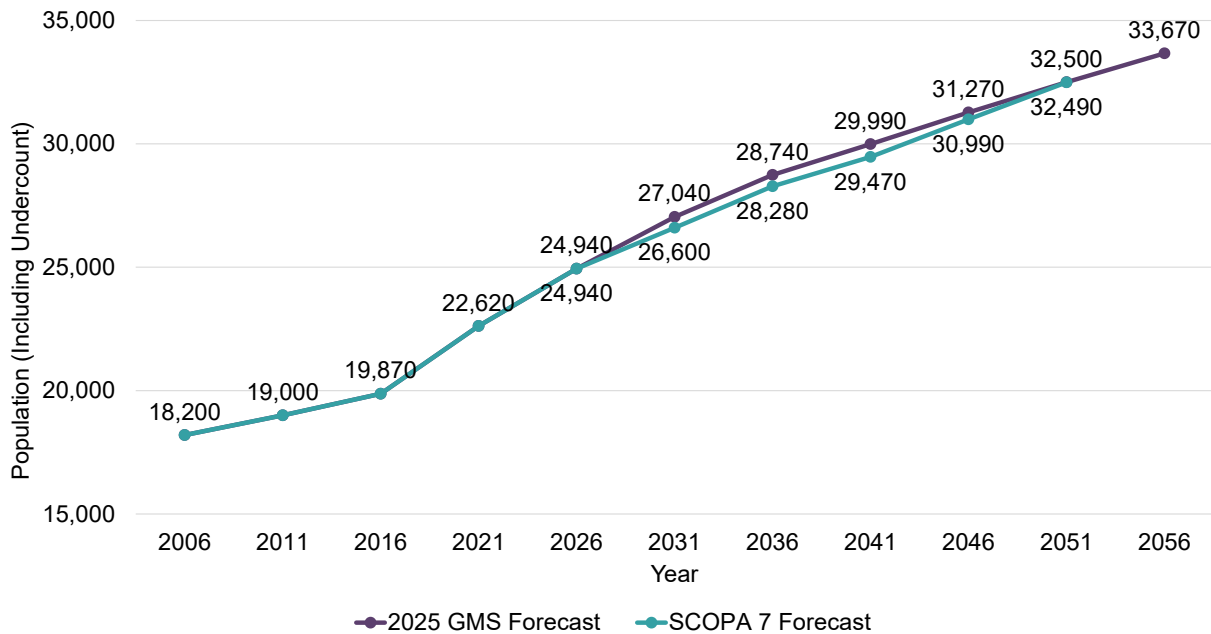
Based on recent Statistics Canada Census data and building permit activity, the 2025 base is estimated at 24,500 people and 8,150 housing units. Compared to the SCOPA 7 forecast prepared in May 2022, the population is tracking relatively close, while the number of building permits issued in the Township is lower than the forecast under SCOPA 7. This discrepancy may be attributed to the higher persons per Unit (P.P.U.) values derived from the most recent postcensal estimates, indicating more people per household than assumed under SCOPA 7. Higher P.P.U.s are likely due to factors such as affordability pressures, which encourage larger or multi-generational households, and larger household sizes among recent immigrants. As a result, the housing forecast has been adjusted to account for this trend.

¹ Revised County of Simcoe Growth Forecasts and Land Needs Assessment, May 2022.

² 2021 Statistics Canada Census. Includes Census undercount of approximately 4.2%.



Figure 6
Township of Springwater
Long-Term Population Forecast, 2006 to 2056



Note: Population metrics include a net Census undercount estimated at 4.2%.

Source: 2006 - 2021 data derived from Statistics Canada, and SCOPA 7 forecast from Revised County of Simcoe Growth Forecasts and Land Needs Assessment, May 2022; 2025 GMS forecast by Watson & Associates Economists Ltd., 2025.

3.2 Township of Springwater Housing Forecast, 2021 to 2056

Figure 7 summarizes the Township's household forecast from 2021 to 2056 in five-year growth increments and by structure type. Housing trends between 2006 and 2021 are also provided for historical context. Key observations are as follows:

- Average annual new housing construction activity over the next three decades is anticipated to be greater than historical average levels experienced over the past 15 years. More specifically, between 2021 and 2056, forecast housing development is expected to average 164 units per year, which is higher when compared to the historical average of 103 units over the past 15 years.¹

¹ As presented in section 2.3, the number of building permits issued over the past 10 years exceeds the number of housing units reported in the Census. In the short-term

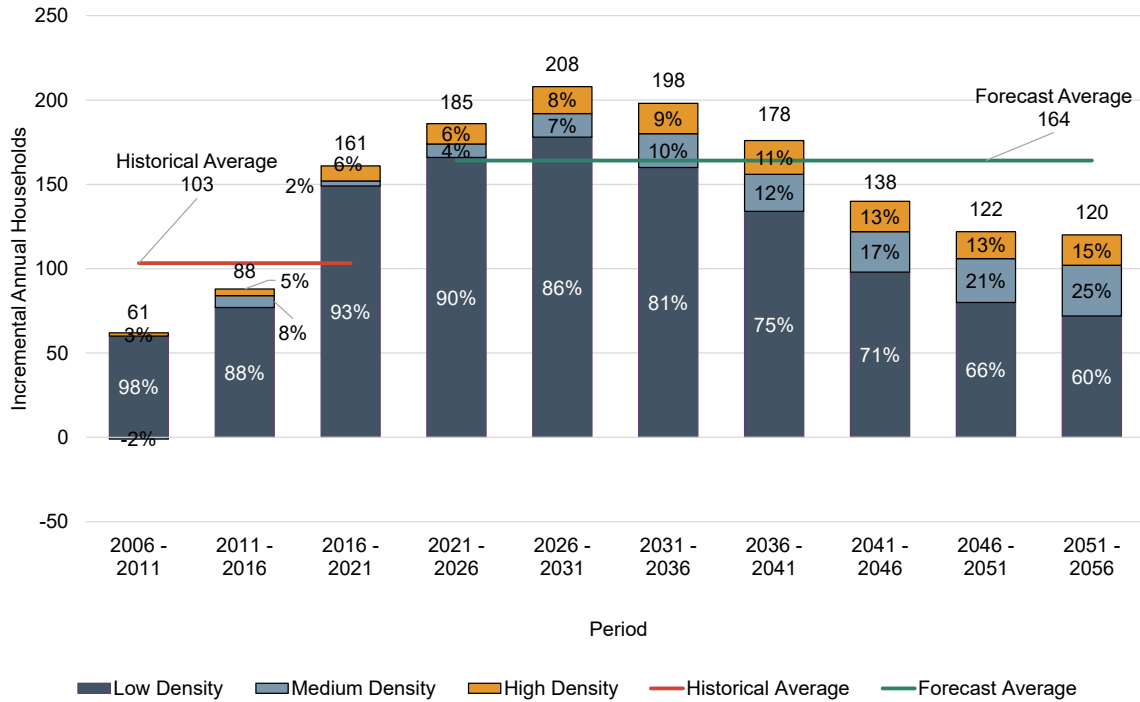


- Going forward, as seen in Figure 7, the average annual housing growth is gradually decreasing over the forecast period after peaking by 2031. Over the longer term, forecast housing activity is expected to moderate as Springwater's population ages. Household formation rates are forecast to slow, and more housing demand will be met through turnover of existing units rather than new construction, contributing to reduced levels of housing development in the latter half of the forecast period.
- Over the 2021 to 2056 forecast period, the Township is forecast to grow by about 5,750 housing units. New housing is forecast to be comprised of 77% low-density (singles and semi-detached), 13% medium-density (townhouses) and 10% high-density (apartments, stacked townhouses, and accessory residential units (A.R.U.)) units. Based on current active development applications, a steady increase in the share of medium- and high-density housing forms is anticipated in the short term. This trend is expected to continue over the longer term, primarily driven by the housing needs associated with the 65+ age group (including seniors' housing) as well as continued upward pressure on local housing prices and declining housing affordability.
- While the share of higher-density housing units is anticipated to increase over the 2021-2056 forecast period, Springwater's total share of housing units is forecast to remain dominated by the low-density units (i.e., single detached and semi-detached units), as shown in Figure 8.

forecast, this higher level of housing activity reflects a closing of the gap between building permit issuances and the units captured in Census data.



Figure 7
Township of Springwater
Annual Incremental Housing Growth – Historical and Forecast, 2006 to 2056



Low density includes singles and semi-detached units.

Medium density includes townhouses and apartments in duplexes.

High density includes bachelor, 1-bedroom, 2-bedroom+ apartments and A.R.U.s.

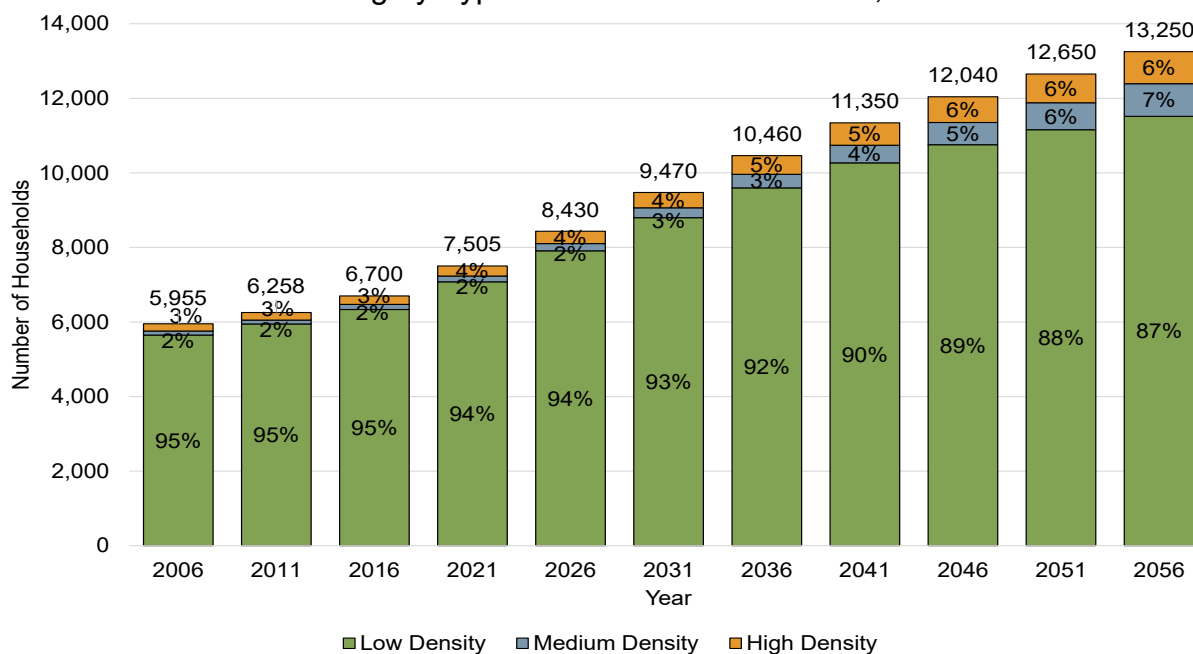
Note: Figures may not add due to rounding.

The historical housing growth in the above figure is derived from the Census, as opposed to Figure 3, which is based on the building permit activity. The numbers in these figures may not align exactly.

Source: Historical 2006 to 2021 figures from Statistics Canada Census Profiles. Forecast prepared by Watson & Associates Economists Ltd., 2025.



Figure 8
Township of Springwater
Total Housing by Type – Historical and Forecast, 2006 to 2056



Low density includes singles and semi-detached units.

Medium density includes townhouses and apartments in duplexes.

High density includes bachelor, 1-bedroom, 2-bedroom+ apartments and A.R.U.s.

Note: Figures may not add due to rounding.

Source: Historical 2006 to 2021 figures from Statistics Canada Census Profiles. Forecast prepared by Watson & Associates Economists Ltd., 2025.

3.3 Township of Springwater Employment Forecast, 2021 to 2056

Employment in Springwater is expected to increase at a rate of 1.0% annually between 2021 and 2056. Under this growth forecast, Springwater's employment base is expected to increase by approximately 2,820 jobs from 2021 to 2056. The forecast anticipates total employment will reach 9,520 jobs by 2056. Similar to the population forecast, the employment growth is forecast to be consistent with SCOPA 7 by 2051 and extended to 2056.

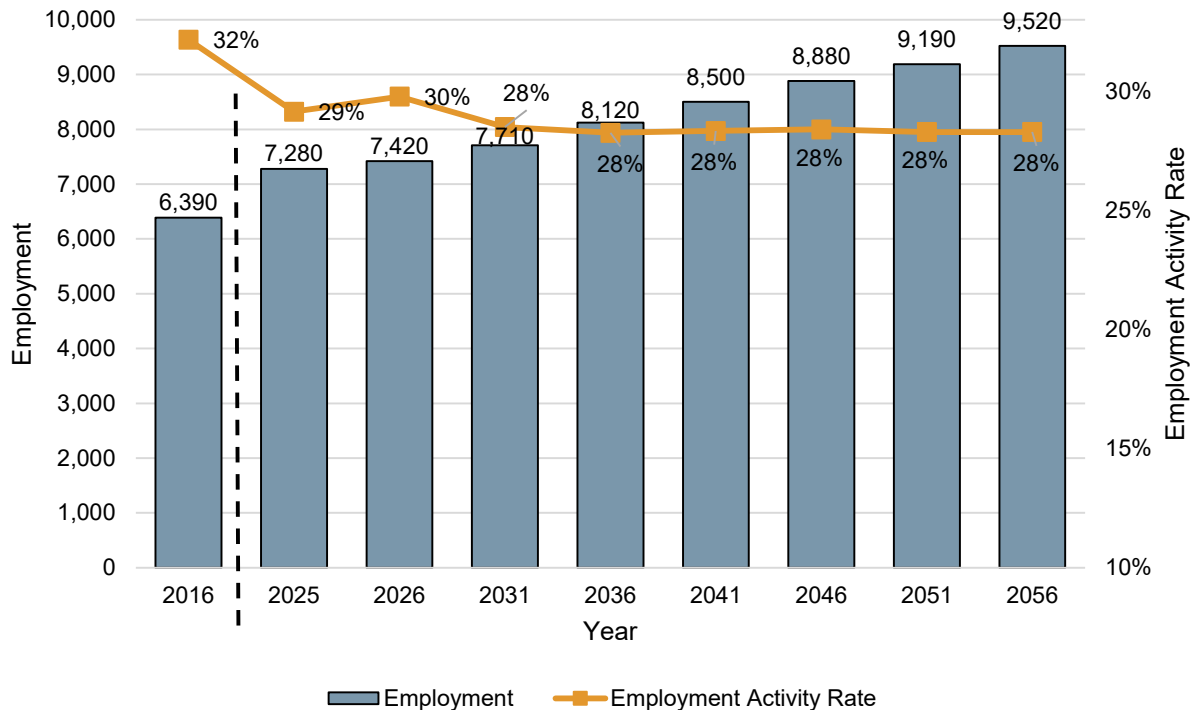
As shown in Figure 9, the Township's employment activity rate is expected to decrease slightly from 29% to 28% between 2021 and 2056.¹ For the Township of Springwater, population growth is expected to grow slightly faster than employment growth over the

¹ Activity rate is the ratio of jobs to population.



forecast period. Furthermore, the aging population over the long-term period will see more people enter retirement age and leave the workforce, further placing downward pressure on the activity rate.

Figure 9
Township of Springwater
Historical and Forecast Employment Forecast, 2016 to 2056



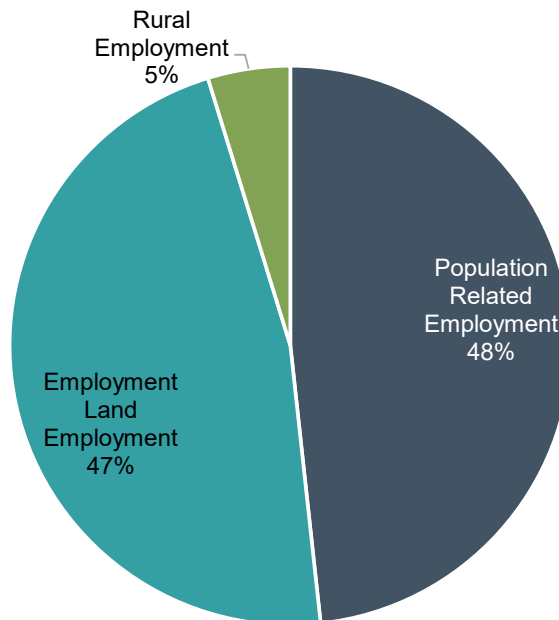
Note: Figures have been rounded. Employment figures include work at home and no fixed place of work (N.F.P.O.W.).

Source: Historical 2006 from Statistics Canada place of work data. Forecast 2021 to 2056 prepared by Watson & Associates Economists Ltd., 2025

Figure 10 summarizes the share of employment growth by sector during the 2021 to 2056 forecast period. As shown in Figure 10, approximately 48% of employment growth is expected to occur within Population-Related Employment sectors, which serve the needs of a growing community (e.g., retail, institutional, service-based, and work at home activities). An additional 47% of total employment growth is anticipated within the Employment Area category, representing jobs located in industrial-type buildings. The remaining 5% employment growth is projected within the rural employment category.



Figure 10
Township of Springwater
Share of Employment Growth, 2016 to 2056



Note: Employment includes work at home and N.F.P.O.W. Numbers have been rounded and may not add precisely.
Source: Watson & Associates Economists Ltd., 2025.



4. Township of Springwater Residential and Non-Residential Land Needs, 2025 to 2056

4.1 Residential Land Needs Analysis, 2025 to 2056

This section evaluates the Township's long-term residential and non-residential land needs in line with the P.P.S., 2024. The analysis is based on forecast demand and the supply of vacant urban lands. Subsections 2.1.3 and 2.1.4 of the P.P.S. require municipalities to:

- Plan for a time horizon of 20 to 30 years, ensuring sufficient land for a full range of uses;
- Maintain at least a 15-year supply of designated residential land; and
- Ensure a three-year supply of serviced and zoned residential units.

Accordingly, the urban land needs assessment has considered requirements across the short-term (3 years), medium-term (15 years), and long-term (to 2056) planning horizons.¹

As noted in section 3.2, the Township is forecast to add about 5,750 housing units between 2021 and 2056, with roughly 5,110 units expected from 2025 to 2056. As noted previously, SCOPA 7 identifies a minimum intensification target of 15%, resulting in an anticipated demand of approximately 3,930 in the Township's greenfield areas. As of 2025, Springwater has about 10,430 units in the development approval process, including 9,590 in the Designated Growth Area (D.G.A.), 40 in the Built-Up Area (B.U.A.) and 800 units in the rural areas. The Township also has a capacity of about 3,480 additional units on 250 hectares of vacant residential land.² As shown in Figure 11, compared to the overall unit supply, the Township is forecast to have a surplus of approximately 9,140 housing units by 2056.

¹ It is noted that while the G.M.S. assesses land needs over a 31-year horizon (2025 – 2056), by the time the Township completes its subsequent O.P. review, the land needs analysis to 2056 will be within the 30-year planning period as established under the P.P.S.

² A copy of the mapping showing vacant residential lands is provided in Appendix A.



Figure 11
Township of Springwater
Urban Settlement Area Residential Land Need, 2025 to 2056

		Low Density	Medium Density	High Density	Total
2025 - 2056 Housing Growth – Designated Growth Area	A	3,340	490	110	3,930
Development Applications in D.G.A.	B	7,230	1,960	400	9,590
Vacant Land Unit Yield Estimate	C	2,400	650	430	3,480
Deficit / Surplus	D = B+C-A	6,290	2,120	720	9,140

Note: Supply data shown in this table excludes M.Z.O. requests
Designated Growth Area (D.G.A.) Housing Growth considers 15% of total housing growth will be through Intensification; 15 Units Annually in Rural Areas.

Source: Watson & Associates Economists Ltd., 2025.

4.2 D.G.A. Community Area Land Needs

Building on the above, this section presents the future land needs associated with D.G.A. Community Areas in the Township, considering needs for both population and employment. SCOPA 7 proposes a density target of 45 people and jobs per ha for the Township's D.G.A. Community Areas. Based on an assessment of the densities in the existing developed D.G.A., densities being proposed in active development applications, the D.G.A. densities proposed in SCOPA 7 are considered reasonable.

Based on the targets identified above, the Township's D.G.A. is forecast to accommodate about 10,350 people and jobs between 2025 and 2056. Considering forecast growth, available land area, and density targets, the Township will have a surplus of about 970 gross developable ha of D.G.A. lands.



Figure 12
Township of Springwater
D.G.A. Community Area Land Needs 2025 to 2056

D.G.A. Land Need – 2025 to 2056		
D.G.A. Population in 2025 - 2056	A	9,000
Number of Jobs	B	1,350
Estimated D.G.A. Population and Jobs 2025 - 2056	$C = A + B$	10,350
Total Vacant D.G.A. Area (Lands with Active Applications and Vacant Lands under Residential and Non-Residential Uses)	D	1,200
D.G.A. Density	E	45
D.G.A. Land Demand	$F = C / E$	230
Surplus / Deficit D.G.A. Lands	$G = D - F$	970

Note: D.G.A. means Designated Growth Area.

Source: Watson & Associates Economists Ltd., 2025.

4.3 Growth Forecast Scenario Analysis, 2051

As part of the G.M.S. analysis, high-level scenarios have been developed and tested to ensure that Springwater's growth strategy can account for a range of possible future growth outcomes. By evaluating a range of potential growth scenarios, the Township can test whether its existing land supply is sufficient under different conditions and identify whether additional residential land may be needed.

The scenario testing identifies three potential growth outcomes for the Township of Springwater to 2051, each reflecting different assumptions regarding the Township's share of Simcoe County's forecast growth. According to the Growth Plan and Simcoe County's Municipal Comprehensive Review (M.C.R.), the County is expected to accommodate approximately 194,340 additional residents between 2021 and 2051. As discussed earlier, there are varying broader macroeconomic and demographic conditions which shape the potential for growth across the broader Simcoe County area, and the Township is limited in its ability to influence this broader growth potential. Within this context, the scenarios test alternative allocations of the County's growth forecast to Springwater, providing a range of possible long-term population and housing outcomes for the Township (refer to Figure 13):

- Scenario 1 assumes Springwater maintains a modest 5% share of Simcoe County growth (consistent with the SCOPA 7 and Township GMS forecast). Under this baseline scenario, the Township would reach a population of about



32,500 and 5,145 housing units by 2051, representing a growth rate of 1.2% annually.

- In contrast, Scenario 2 assumes Springwater captures an 8% share of County growth, which is the Township's highest observed share historically compared to County-wide growth.¹ This results in a population of approximately 37,500 and an estimated 7,100 new housing units by 2051.
- Under the more aggressive Scenario 3, Springwater is assumed to capture a 10% growth share (based on an extrapolation of the Township's historical growth share over the past two decades). Based on this scenario, the Township would yield a population of 41,100 and 8,500 new housing units, representing a stronger annual growth rate of 2%.

Figure 13
Township of Springwater
Total Housing by Type – Historical and Forecast, 2021 to 2051

Scenario	Springwater Share of Growth	2051 Population Estimate	2021 - 2051 Housing Estimate	2021 – 2051 Population Growth Rate
1	5% (Based on SCOPA 7 Forecast)	32,500	5,145	1.2%
2	8% (Highest Share of Growth compared to County Growth)	37,500	7,100	1.7%
3	10% (Extrapolate Increased Growth Share)	41,100	8,500	2.0%

Source: Historical 2006 to 2021 figures from Statistics Canada Census Profiles. Forecast prepared by Watson & Associates Economists Ltd., 2025.

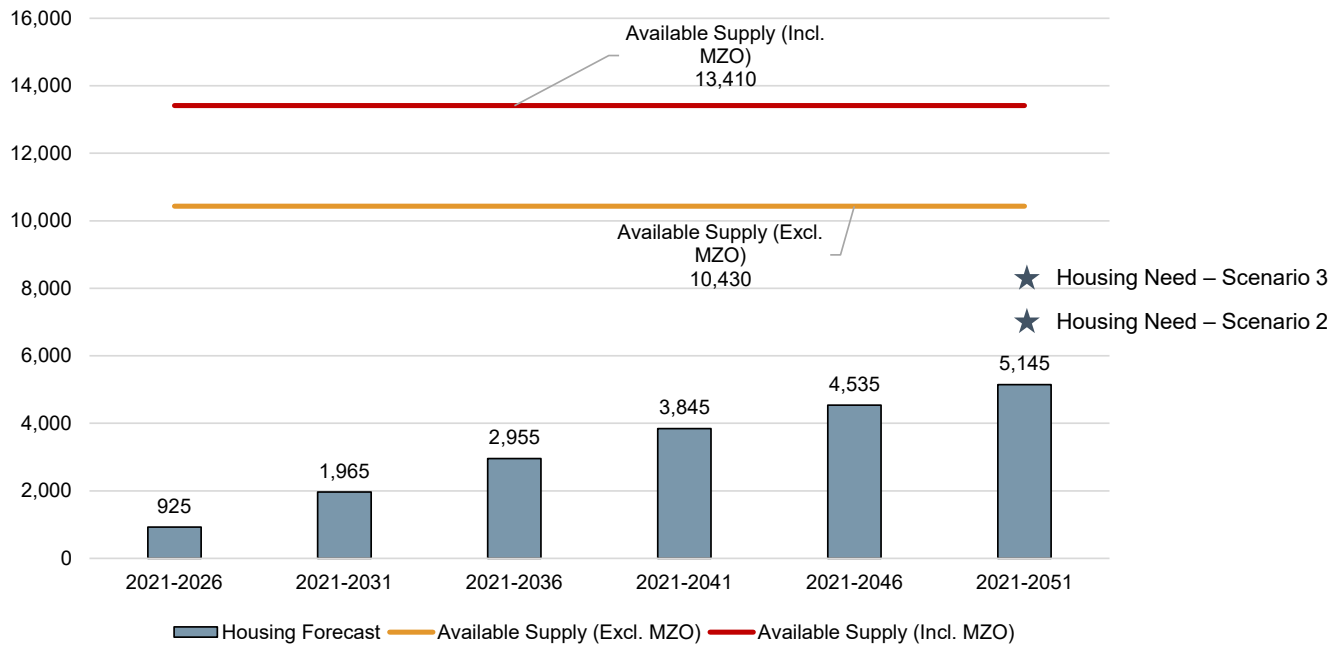
As discussed previously in Section 2.4, the Township has about 13,410 units in the approval process, with about 10,430 units that are registered, draft approved or under review, and an additional 3,000 units under Minister's Zoning Order (M.Z.O.) request. As shown in Figure 14, even under the highest growth scenario, the Township maintains a sufficient supply of urban residential land to accommodate projected demand to 2051. Under all these growth scenarios, the Township can accommodate long-term growth with the units in the development approvals process. Furthermore, the

¹ Based on 5-year Census periods over the past two decades.



lands subject to an M.Z.O. and the remaining vacant urban lands provide additional capacity to accommodate long-term growth.

Figure 14
Township of Springwater
Total Housing by Type – Historical and Forecast, 2021 to 2051



Note: This analysis uses the time horizon of 2051, ensuring consistency with the County-wide SCOPA 7 forecast.

Source: Supply data from the Township of Springwater, forecast by Watson & Associates Economists Ltd., 2025.

4.4 Employment Area Land Needs Analysis, 2025 to 2056

Figure 15 summarizes forecast demand against available supply for Employment Area land from 2025 to 2056 to determine the Employment Area land needs for Springwater.

Key observations include the following:

- Of the 2,190 total jobs forecast for Springwater, 1,090 are forecast on Employment Area lands between 2025 and 2056;
- Based on an assessment of the local industrial profile of the Township and presence of a mix of larger and smaller settlement areas, it is recommended that the Employment Area density be adjusted from 20 jobs/ha to 15 jobs/ha.



- Adjusted for a density of 15 jobs per net ha, there is an employment land demand of 69 net ha by 2056; and
- The Township has a vacant Employment Area land supply of 16 net ha.¹ A map displaying the vacant Employment Area lands is provided in Appendix B.
- Based on the demand and net vacant employment land supply, a deficit of approximately 53 net ha is anticipated within the Township by 2056. Additional land will be required to account for non-developable features and infrastructure requirements, and a contingency of about 15%, resulting in a gross employment land need of 81 ha by 2056.²

Figure 15
Township of Springwater
Urban Employment Area Land Needs, 2025 to 2056

Employment Land Demand	
Employment Lands Employment Growth	1,090
Employment Growth Accommodated by Intensification (5%)	55
Total Employment Growth Adjusted for Intensification	1,035
Employment Land Density (jobs/net ha)	15
Employment Land Demand (net ha)	69
Employment Land Supply (net ha)	16
Employment Land Need	-53
Employment Land Need with Added Contingency of 15% (net ha)	-61
Gross Employment Land Need / Deficit	-81

Note: Net employment land area excludes lands associated with local infrastructure (e.g., local roads, stormwater ponds, utility easements, etc.), which is estimated to represent approximately 15% of gross land area.

The numbers may not add due to rounding.

Source: Watson & Associates Economists Ltd., 2025.

¹ A 15% land vacancy factor was applied to the vacant employment land supply to account for lands which may not develop over the planning horizon due to barriers such as environmental constraints, landowner willingness, parcel fragmentation etc.

² A market contingency factor refers to a buffer or adjustment factor used to account for uncertainty or variability in the market conditions that may affect land demand.

As part of the Springwater Land Needs Analysis, a 15% market contingency factor has been utilized. This factor is utilized to ensure that the Township has the flexibility to accommodate potentially higher levels of forecast industrial land demand and has greater flexibility to accommodate a more diverse range of industrial uses.



5. Conclusions

The Township of Springwater is forecast to accommodate continued population, housing, and employment growth at levels higher than historically observed. Between 2021 and 2056, the Township is expected to grow by approximately 11,000 residents and 2,800 jobs, with housing development averaging 164 new units annually, well above the historical housing growth. While low-density housing is forecast to continue to dominate the market, the share of medium- and high-density forms is anticipated to increase, reflecting demographic shifts, affordability pressures, and active development applications currently in the pipeline.

Over the longer-term horizon to 2056, a residential unit surplus of approximately 9,140 units is anticipated. Scenario testing confirms that, even under the highest growth allocation (10% of County-wide growth), Springwater's designated urban residential lands are sufficient to accommodate forecast housing demand to 2051. Based on this, there is no need for an urban boundary expansion to accommodate growth to 2056. The Township can continue to monitor the absorption of its D.G.A. lands against long-term demand for development in Springwater's urban areas.

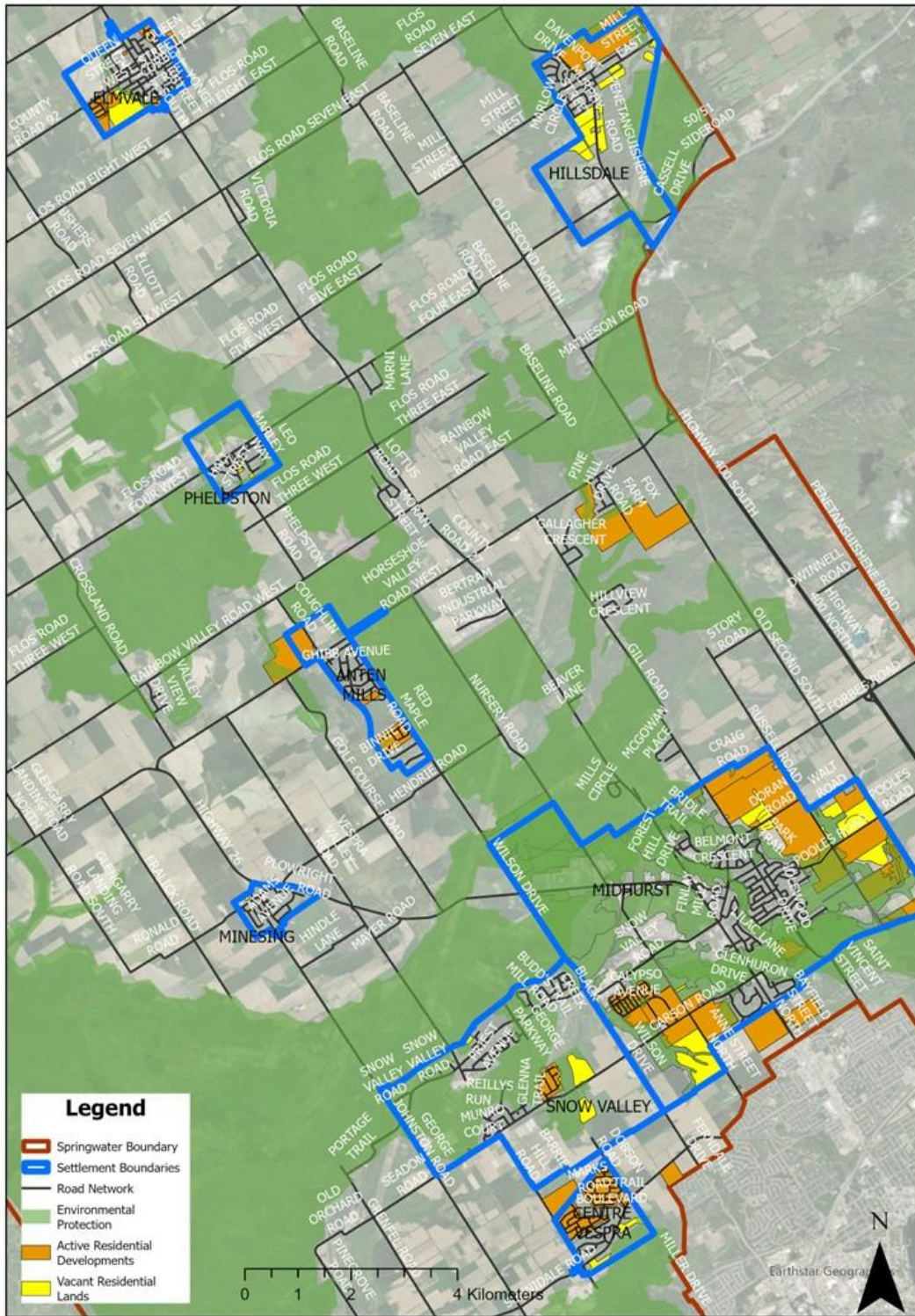
With respect to Employment Areas, Springwater needs an additional 81 gross ha of employment lands by 2056. Although the G.M.S. explores a land need to 2056, section 2.1.3 of the P.P.S., 2025 allows municipalities to plan beyond a 30-year planning horizon. Furthermore, to promote complete communities, sufficient Employment Areas should be planned alongside residential lands to maintain a healthy balance between jobs and residents. The Township should plan and conduct further analysis to expand its Employment Areas. Addressing these needs will require proactive planning through the O.P. review process to ensure the Township remains well-positioned to accommodate forecast growth to 2056 and beyond.



Appendices



Appendix A – Vacant Residential Lands





Appendix B – Vacant Employment Area Lands

