



Employment Areas Review Options and Directions for Land Use Approaches

October 2025





Options and Directions for Land Use Approaches Technical Report

Town of Oakville Employment Areas Review

Final Report

October 2025

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Table of Contents

	Page
Executive Summary	i
1. Introduction.....	1
1.1 Terms of Reference	1
1.2 Terminology	3
2. Policy and Case Law Considerations	5
2.1 Function of Employment Areas.....	5
2.1.1 Old Framework (Pre-Provincial Planning Statement, 2024).....	5
2.1.2 New Framework (P.P.S., 2024)	7
2.1.3 Continuation of Lawfully Established Uses	9
2.2 Town of Oakville Official Plan Amendment 34	10
3. Implementation of the Provincial Planning Statement, 2024 in the Greater Golden Horseshoe	11
3.1 City of Toronto	11
3.2 City of Mississauga	12
3.3 City of Hamilton	13
3.4 City of St. Catharines	13
3.5 City of Vaughan	13
3.6 City of Pickering.....	14
3.7 Town of Milton	14
3.8 Observations.....	15
4. Town of Oakville Employment Lands	17
4.1 Development Activity	17
4.1.1 Historical Employment Land Absorption	17
4.1.2 Industrial Building Construction Activity	18
4.1.3 Office Development Activity on Employment Lands.....	20
4.2 Employment Areas Removals.....	23
4.2.1 Establishing Current Function of the Town's Employment Lands	24



Table of Contents (Cont'd)

	Page
4.2.2 Core Principle for Evaluating Employment Area Removals	25
4.2.3 Additional Employment Area Evaluation Criteria.....	26
4.2.4 Evaluation of Proposed Employment Area Removals.....	27
4.3 Underutilized Employment Lands	41
4.4 Employment Land Supply	42
4.5 Employment Forecast and Land Needs Analysis	49
4.5.1 Town of Oakville Employment Forecast.....	49
4.5.2 Employment Growth Allocation by Employment Category, 2024 to 2051	50
4.5.3 Employment Growth by Geographic Area, 2024 to 2051	53
4.5.4 Existing Average Employment Density by Employment Category	56
4.5.5 Forecast Employment Land Density	60
4.5.6 Employment Land Need	64
4.6 Observations.....	68
5. Policy Recommendations and Options	70
5.1 Urban Structure	70
5.2 Land Use Designations and Special Policy Areas	72
5.3 Minimize Redesignation of Employment Lands	75
5.4 Ensure Land Use Compatibility.....	77
5.5 Planning for Office and Mixed-Use Development in Strategic Growth Areas and Major Transit Station Areas.....	78
5.6 Explore Opportunities for Intensification of Employment Lands.....	81
5.7 Growth Monitoring	82
6. Conclusions	84
Appendix A Glossary.....	A-1



List of Acronyms and Abbreviations

E.L.E.	Employment Land Employment
G.G.H.	Greater Golden Horseshoe
M.C.R.	Municipal Comprehensive Review
MMAH	Minister of Municipal Affairs and Housing
M.O.E.	Major Office Employment
M.T.S.A.	Major Transit Station Area
N.A.I.C.S.	North American Industry Classification System
N.F.P.O.W.	No Fixed Place of Work
OLT	Ontario Land Tribunal
O.P.	Official Plan
O.P.A.	Official Plan Amendment
P.P.S., 2005	Provincial Policy Statement, 2005
P.P.S., 2024	Provincial Planning Statement, 2024
P.R.E.	Population-Related Employment
Q.E.W.	Queen Elizabeth Way
S.G.A.	Strategic Growth Area
Sq.ft.	Square feet
Sq.m	Square metre



Executive Summary

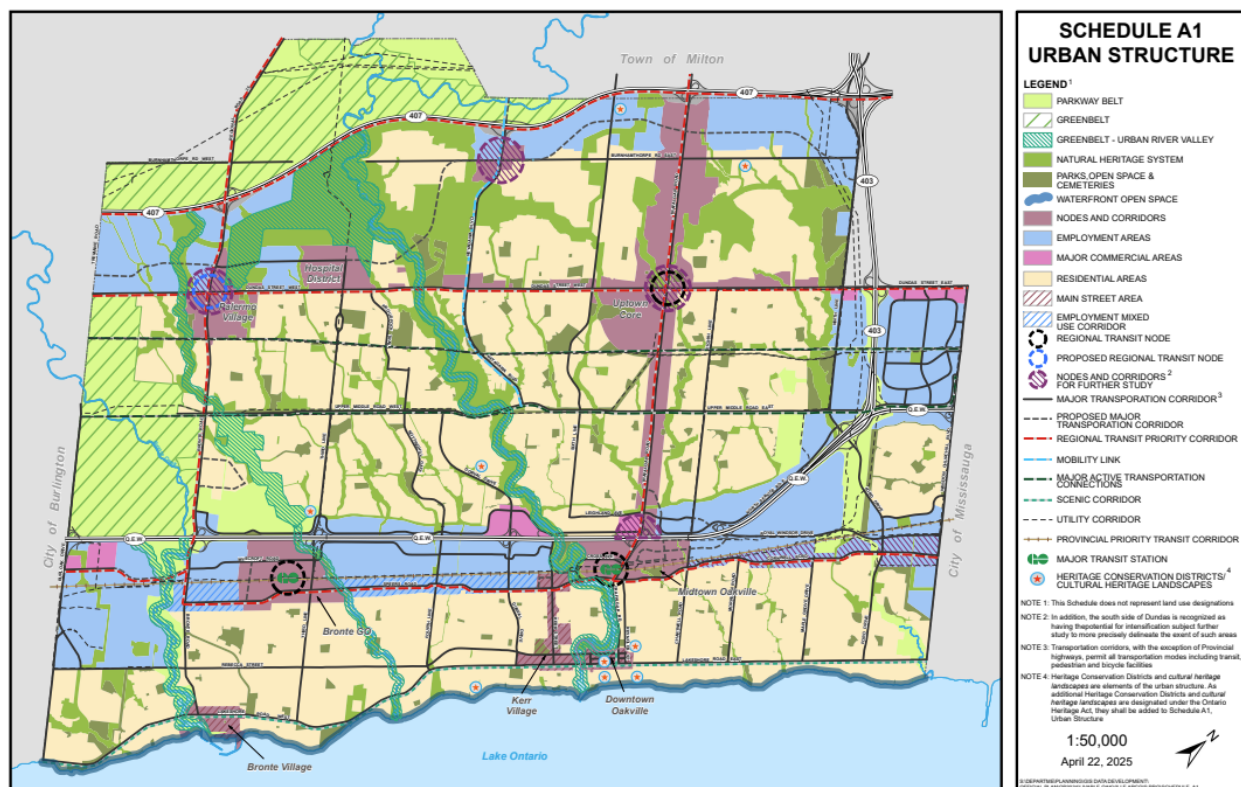
This *Options and Directions for Land Use Approaches Technical Report* is prepared by Watson & Associates Economists Ltd., in association with WSP. This work builds upon the earlier *Background Facts Report* and the *Financial and Market Analysis Report*, with the objective of guiding the Town's Official Plans (O.P.s) in response to evolving market conditions and the new legislative changes and policy framework established under the *Planning Act* and Provincial Planning Statement, 2024 (P.P.S., 2024).

Building on the previous reports, this review provides a comprehensive analysis of Oakville's Employment Areas as shown in Schedule A1 Urban Structure of the Town's O.P., *Livable Oakville*, (see Figure ES-1 on the following page), focusing on the Town's long-term Employment Land^[1] needs. This report evaluates the current provincial policy landscape and the functional composition of Employment Areas. It identifies recommended land use adjustments to ensure conformity with provincial direction while maintaining the Town's overall urban structure by supporting a diverse and competitive local economy. Hereinafter, the Employment Areas identified in Figure ES-1, highlighted in blue, will be referred to as Employment Lands, and the term "Employment Area" will reference the new P.P.S., 2024 definition.

^[1] For an explanation of the difference between "Employment Lands" and "Employment Areas" please see Section 1.2 of this report.



Figure ES-1
Town of Oakville
Urban Structure



Source: Livable Oakville Official Plan, as amended April 2025.

Key Findings and Insights

Provincial Policy Shifts Require a New Approach

The P.P.S., 2024, introduces a narrower definition of Employment Areas, focusing on industrial-type uses (such as manufacturing, warehousing, logistics, and other similar uses) that explicitly exclude institutional, commercial, and office uses. This redefinition impacts Oakville's planning framework and long-standing mix of traditional employment and employment-supportive commercial, institutional, and office uses.

This change necessitates a comprehensive review of uses within the Town's Employment Lands. The review considers whether the lands occupied by these uses should continue to be included in or removed from the Town's protected Employment Areas. The review also considers the Town's vacant Employment Lands.



Employment Land Mapping and Functionality Assessment

A parcel-level analysis was conducted using the 2023 Halton Region Employment Survey to assess which lands align with the revised definition of the term Employment Area. This assessment revealed that many existing Employment Lands function as mixed-use employment hubs, including areas that comply with the new provincial definition, those that do not, and lawfully established uses.

Targeted Employment Area Removals Proposed

Based on criteria such as contiguity, compatibility, infrastructure access, and employment function, several sub-areas are recommended for removal from the Employment Area designation.^[2] These areas to be removed are better suited for redesignation to continue supporting non-industrial employment uses and mitigating issues related to maintaining flexibility for non-compliant uses. The total proposed removals amount to 12% of the Town's current vacant Employment Lands.

Employment Growth Outlook and Employment Densities

Oakville's employment is forecast to grow by approximately 73,700 jobs between 2024 and 2051, with employment distributed across Employment Lands (44%), Strategic Growth Areas (S.G.A.s) (39%), and Residential and Commercial Areas (17%). This supports a diversified and resilient employment base.

Overall, average employment densities are expected to rise due to intensification, evolving built forms (e.g., multi-tenant industrial, flex-office), and new higher-density office developments, increasing efficiency in land use. For industrial-type uses, trends toward automation and steady demand for logistics and warehousing operations are anticipated to generate a continued need for large industrial sites, often with low average employment densities. For industrial-type uses, average densities are expected to decline modestly relative to current conditions.

^[2] Refers to designated lands in Schedules E to S1, which include Business Employment, Industrial, Business Commercial, highlighted in blue of the Livable Oakville Plan and lands designated as Employment District in Figure NOW 2 and NOE 2 in the North Oakville Secondary Plan Land Use Plan.



The Town's Employment Land Supply is Anticipated to be Fully Exhausted by 2051

Following the recommended removal and redesignation of certain lands, the Town continues to retain a substantial supply of vacant and developable Employment Lands, particularly in North Oakville. Employment Lands include Protected Employment Areas (i.e. lands that meet the P.P.S., 2024 definition) and lands that are removed (i.e. non-industrial and Employment-Generating uses), to be redesignated.

To accommodate the Town's long-term employment growth forecast and support continued economic development potential, the Town's Employment Land is expected to be fully utilized by 2051. This long-term employment needs assessment assumes increasing opportunities for employment intensification in established areas and increased land utilization, where possible.

It is recognized that the long-term Employment Land shortfall identified herein may vary, subject to demand for Employment Lands, average employment density levels associated with new construction, and the level of employment intensification achieved over time. Accordingly, it is recommended that the Town regularly monitor its Employment Land supply, building on the input and direction from this review. Planning for the growth and utilization of Protected Employment Areas may also extend beyond the 20-to 30-year planning horizon outlined in section 2.1.3 of the P.P.S., 2024.

Policy Recommendations

To implement the findings of this study, the following policy directions are recommended:

- Amend urban structure schedules and land use designations to reflect Employment Area removals and the provincial direction to focus Employment Areas on more industrial uses.
- Lands that are identified for removal shall be redesignated as Business Area, to accommodate non-industrial but employment-supportive uses.
- Update permitted land use policies to distinguish between Protected Employment Lands (i.e. lands to be protected for industrial uses) and Business Areas (i.e. those suitable for flexible employment functions).
- Establish clear policy criteria to assess and manage future Protected Employment Area removal requests in the absence of a Municipal Comprehensive Review process.



- Similarly, establish clear policy criteria to assess and manage future Business Area removal requests to ensure that land supply and land use compatibility needs are met.
- Maintain policy emphasis on retaining Protected Employment Areas near Goods Movement corridors and preserving the contiguity and economic viability of Employment Lands.

Conclusion

This report provides a clear roadmap for updating Oakville's land use planning framework in alignment with provincial policy changes and local economic needs. By protecting core industrial areas while enabling flexibility in areas with diverse employment uses, the Town can foster long-term economic competitiveness, job growth, and a well-functioning urban structure.

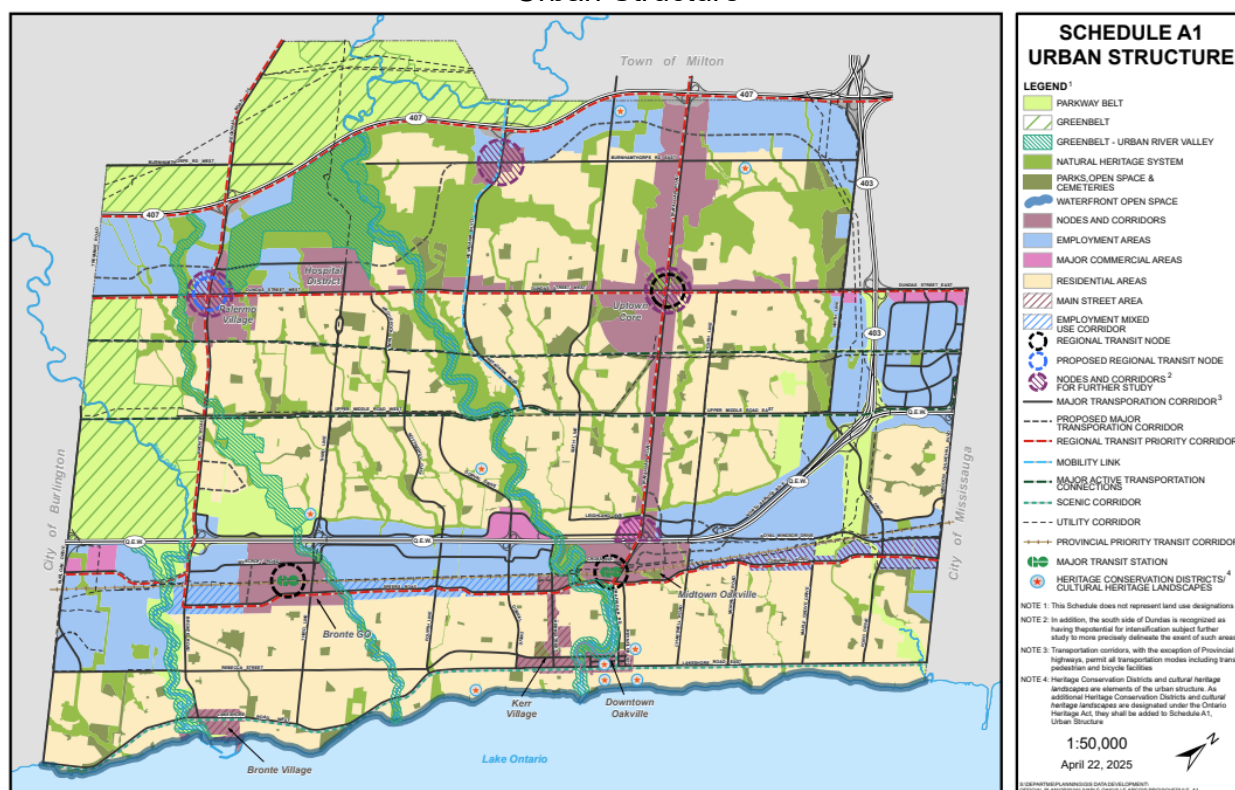


1. Introduction

1.1 Terms of Reference

The Town of Oakville retained Watson & Associates Economists Ltd. (Watson), in association with WSP, to conduct an Employment Areas Review. The purpose of the Employment Areas Review is to assess the land use designations and policies that guide growth and development within the Town's delineated Employment Areas, as shown in Schedule A1 Urban Structure of the Town's O.P., *Livable Oakville*, (see Figure 1), ensuring long-term job growth and the protection of the Employment Land supply. Hereinafter, the Employment Areas that are identified in Figure 1, highlighted in blue, will be referred to as Employment Lands, and the term "Employment Area" will reference the new P.P.S., 2024 definition.

Figure 1
Town of Oakville
Urban Structure



Source: Livable Oakville Official Plan, as amended April 2025.



This report represents the third and final report prepared as part of this Employment Areas Review. The first report, the *Background Facts Report*, provided an overview of existing research, background data, best practices, and studies related to Employment Lands.^[3] The second report, the *Financial and Market Analysis Technical Report*, examined current and emerging market trends impacting Employment Lands and identified key challenges and opportunities within the Town's Employment Lands.^[4] The report herein builds on the first two technical reports. It provides land use options and planning policy directions for the Town's Official Plans (O.P.s) in response to evolving macro-economic conditions and changes in provincial policy. The primary objectives of this assignment are listed below:

- Provide an overview of the provincial, regional, and Town policies that apply to long-term growth management and planning for Employment Lands, focusing on enhancing the economic competitiveness of the Town.
- Assess how other municipalities within the Greater Golden Horseshoe (G.G.H.) have addressed the changes in provincial legislation as it relates to the Provincial Planning Statement (P.P.S.), 2024.
- Analyze recent development trends on Oakville's Employment Lands, focusing on industrial and office construction and examining how built-forms and employment uses have influenced employment densities.
- Assess the Town's existing Employment Land inventory by current function and composition to identify lands occupied by uses that do not align with the updated provincial definition (P.P.S., 2024) and may be considered for removal.
- Provide a long-term employment forecast for Employment Lands by land use category and anticipated density and take-up of land associated with employment growth.
- Provide policy directions and options for the Town of Oakville in planning for Employment Lands, including guidance on the protection of Employment Areas that meet the provincial definition and considerations for employment lands that do not.

As part of the Town's Employment Areas Review, two rounds of consultation were planned. The first round was held in June 2025, while the second round is scheduled for Fall 2025. These consultations aim to present preliminary findings, gather feedback

^[3] Background Facts Report, Employment Areas Review, 2025, Town of Oakville.

^[4] Financial Market Report, Employment Areas Review, 2025, Town of Oakville.



to inform the final report and support the development of updated policies for the Town's O.P.s.

1.2 Terminology

Throughout this report:

- “Employment Land” or “Employment Lands” refers to the Town’s overall supply of lands which support job-creation, including a range of non-residential uses, both industrial and non-industrial in nature. These lands are delineated in the Town’s O.P. on Schedule A1 Urban Structure and are highlighted in blue in Figure 1 (refer to section 1.1). More detail on the breakdown of the Town’s Employment Land supply is provided in Section 4.4 of this report.
- “Employment Area” or “Employment Areas” refers to specific areas which are delineated through the Town’s O.P. and subject to a provincial policy framework which preserves them for “clusters of business and economic activities” and establishes specific tests that must be met to develop those lands for other uses.^[5] The P.P.S. 2024 change to what constitutes “clusters of business and economic activities” is the primary driver of this Employment Areas Review.

Please note that while the Province uses the lower-case “area of employment” and “employment area” in the *Planning Act* and P.P.S., 2024. Within this report, “Employment Area” refers to the provincial concept. Where the lower-case “employment area” is used, it is only to quote specific language in provincial policy documents.

Employment Areas are currently **delineated** throughout Oakville, as outlined in the urban structure of its primary O.P., the *Livable Oakville Plan*. Policies in Section 14.2 of the *Livable Oakville Plan* establish policies for the conversion of lands to non-employment uses. Employment Areas are hereinafter referred to as Employment Lands throughout this report.

^[5] These tests were previously established in Section 1.3.2.5 of the *Provincial Policy Statement*, 2020, referring to “conversions” of lands in Employment Areas. They are now established in Section 2.8.2.5 of the *Provincial Planning Statement*, 2024, referring to “removals” of lands from Employment Area.



These Employment Lands are further **designated** (to apply specific permitted uses and development criteria) as follows:

- In the *Livable Oakville Plan* as Office Employment, Business Employment, Industrial, and Business Commercial (see Section 14 and Schedules E-K of the *Livable Oakville Plan*);
- In the *North Oakville East Secondary Plan* as Employment District (see Section 7.6.8 and Figure NOE2); and
- In the *North Oakville West Secondary Plan* as Employment District (see Section 8.3.2. and Figure NOW 2).

While recent provincial changes have narrowed the definition of Employment Area to focus on industrial-type uses for land protection, Oakville's existing developed Employment Lands support a broad range of industrial and on-industrial uses. Therefore, for this report, in the Oakville context "Employment Area" refers to the refined Employment Areas that will be designated through this Review as meeting the definition of "area of employment"/"employment area" under the *Planning Act* and P.P.S., 2024.

Throughout this report, the following terms are used to differentiate land uses in the Town's Employment Lands:

- "Compliant" refers to types of land use that are listed in the definition of "area of employment" in Section 1(1) of the *Planning Act*.
- "Non-compliant" refers to types of land use that are not listed in the definition of "area of employment" in Section 1(1) of the *Planning Act*.

Finally, throughout this report, the following terms are used to describe the proposed changes to the Town's Employment Lands:

- "Remove" or "Removal" refers to lands that are delineated in the *Livable Oakville Plan* as Employment Areas (see Figure 1), but **will not** be designated as Employment Areas going forward under the updated provincial concepts. These lands **will not** be subject to the tests for proposed removal established in Section 2.8.2.5 of the P.P.S., 2024.
- "Remain" or "Retain" refers to lands that are delineated in the *Livable Oakville Plan* as Employment Lands (see Figure 1), which **will** be designated as



Employment Areas under the updated provincial concepts. These lands **will** be subject to the tests for proposed removal established in Section 2.8.2.5 of the P.P.S., 2024.

2. Policy and Case Law Considerations

This chapter provides an overview of the relevant provincial and Town policies that apply to long-term growth management and economic competitiveness in the Town of Oakville. To accommodate Oakville's steadily growing economic base, the Town's land use planning policies must anticipate the evolving nature of the local and regional economies and reflect the diverse needs of industry and businesses of all sectors and sizes over the long term. These policies must also offer a degree of flexibility and nimbleness that allows for rapid responses to unforeseen changes, which can be a critical competitive advantage relative to competing markets.

2.1 Function of Employment Areas

2.1.1 Old Framework (*Pre-Provincial Planning Statement, 2024*)

The concept of an Employment Area as a planning tool in Ontario is approximately 20 years old, having been first introduced in the Provincial Policy Statement (P.P.S.) of 2005. While clusters of industrial and business uses have developed in various urban and suburban contexts for over a century, this introduction of the specific term “employment area” in 2005 represented a deliberate intent on the part of the Province to plan for lands to support a range of business uses. In particular, the P.P.S., 2005 introduced the idea of designating and preserving contiguous areas of land specifically for “employment” uses, defining Employment Areas as:

“those areas designated in an official plan for clusters of business and economic activities including, but **not limited to**, [emphasis added] manufacturing, warehousing, offices, and associated retail and ancillary facilities”^[6]

This definition and conception of Employment Areas was maintained through the subsequent P.P.S., 2014 and P.P.S., 2020. Earlier policy direction from the P.P.S., 1996, was also maintained, which required that major facilities and sensitive land uses

^[6] Provincial Policy Statement, 2005, p. 30.



be planned in a way that avoids (or mitigates if avoidance is impossible) issues of land use compatibility. This direction has been implemented through additional guidance from the provincial environmental land use planning guides (referred to as the “D-series guidelines”).

This policy framework for Employment Areas rising from the P.P.S., 2005 and its successors (as well as the soon-to-follow Growth Plan for the Greater Golden Horseshoe) was reflective of the existing land use context of most of the existing industrial areas in the Greater Toronto and Hamilton Area (G.T.H.A.) and its surroundings. These areas support a broad range of non-residential uses, including commercial and institutional uses. It is noted that the range of commercial and institutional uses permitted within Employment Areas across Ontario varies considerably, subject to local O.P.s and zoning. Beyond manufacturing operations, a typical development block within Employment Areas in the G.T.H.A. will often contain a diverse mix of uses, including but not limited to:

- Small- and large-scale manufacturing uses;
- Warehousing and distribution centres;
- Food and beverage industries such as breweries;
- Employment-supportive uses like restaurants and cafes, business services, and small-scale retail;
- Auto-related uses like body shops and dealerships;
- Offices, both standalone, integrated with other uses, or associated with other uses; with other uses;
- Recreational uses such as dance studios, gymnastics facilities, sports complexes, and rock climbing gyms;
- Education and training facilities;
- Public services facilities; and
- Places of worship.

Ultimately, the distinguishing factor of Employment Areas is their lack of residential uses, rather than their support of any one sector of use or business. Businesses and uses in Employment Areas may benefit from any combination of:

- Access to major Goods Movement corridors and facilities (including highways, rail infrastructure, and airports);
- Larger lot sizes that support large buildings, parking, and outdoor storage;



- Separation from potentially incompatible uses like residential neighbourhoods;
- Lower land and/or lease costs than mixed-use or commercial areas; and
- Proximity to other employers and employees, in the case of employment-supportive uses.

Most municipalities in the G.G.H., including Oakville, have maintained a policy and zoning environment that supports this multifaceted nature of Employment Areas. Flexibility is provided for a broad range of uses, with some municipalities limiting particular uses, such as places of worship or daycares. Established Employment Areas have evolved into an ecosystem supporting a diversity of use and business, aligning with municipal intent and direction.

2.1.2 New Framework (P.P.S., 2024)

The changes to the definition of “area of employment” in section 1 of the *Planning Act* and related policy changes in the new P.P.S., 2024 are described in the *Background Facts Report* in Phase 1 of this project. To date, the Province has provided limited guidance on the expected interpretation of the new definition and P.P.S., 2024 direction. In the Province’s posting on the Environmental Registry of Ontario related to the change of definition in the *Planning Act* under Bill 97 (the *Helping Homebuyers, Protecting Tenants Act*, 2023), the Province included the following rationale:

“Modifying the definition of area of employment to only include heavy industry and other employment uses that cannot be located near sensitive uses, (i.e., not suitable for mixed use) to scope the applicability of existing provisions which limit appeals of municipal refusals and non-decisions.”^[7]

Additionally, in the *Helping Homebuyers, Protecting Tenants Plan*, which accompanied *Bill 97*, the Province included the following items under the heading of “increasing housing supply”.

Protecting Employment Areas

The proposed changes would ensure land is available for industry and manufacturing, encourage office and institutional uses in areas closer to transit, and provide flexibility to convert Employment Areas for local uses – supporting the kinds of development and jobs that communities need.

^[7] ERO number 019-6821, June 16, 2023 (<https://ero.ontario.ca/notice/019-6821>)



Balancing Housing and Other Needs

Some industries need to be separated from residential areas to reduce the impact of noise, odours, and other undesirable by-products. Housing cannot be located too close to these areas under the policies of the P.P.S., 2024.

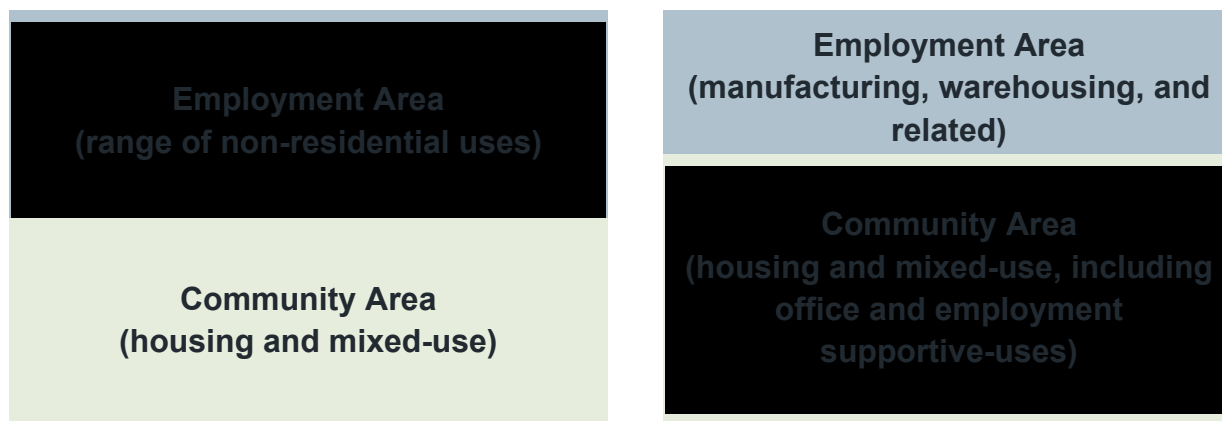
Several considerations should be noted based on the established statutory and policy changes and the guidance provided above from the Province:

- The intent of the changes is to make more land available for housing in mixed-use development by reducing the supply of land needed to be protected for Employment Areas. This direction is in line with other changes to the provincial planning framework, including the removal of the requirement for a Municipal Comprehensive Review (M.C.R.) for site-specific removals of lands from Employment Areas.
- Beyond the primary objective to increase land supply for mixed-use development, the focus of the Province's guidance is on mitigating issues of compatibility between heavy industrial uses and sensitive land uses.

As illustrated in Figure 2, when viewed through the lens of greenfield development (i.e., where vacant land is being considered for new Community Area and Employment Area development), the rationale for the Province's changes aims to provide additional opportunities to accommodate future housing in Community Areas. This is balanced by the need for land to accommodate both industrial-type uses as well as non-industrial uses supporting industrial-type uses.



Figure 2
Greenfield Land Allocation Pre-Provincial Planning Statement, 2024 (left)
and After (right)



For existing Employment Areas that function as described in subsection 2.1.1, implementing the new provincial framework is far more complex. In cases where existing uses fall within the *Planning Act* definition of “area of employment,” municipalities are tasked with preserving contiguous lands to support heavy industrial uses. In certain cases, this may come at the expense of rendering longstanding, established uses that do not fit the new definition as legally non-conforming. The implications for this action are described in the following subsection below.

2.1.3 Continuation of Lawfully Established Uses

Where the Town chooses to retain existing Employment Areas as delineated on Schedule A1 of the *Livable Oakville Plan*, it will be required through its O.P.s, per policy 2.8.2.3 of the P.P.S., 2024, to prohibit uses that do not meet the *Planning Act* definition in those areas. As noted in the *Background Facts Report*, section 1(1.1) of the *Planning Act* provides transitional provisions that allow municipalities to continue to include existing commercial, office and institutional uses within Employment Areas, that do not comply with the new definition, provided they were lawfully established before October 20, 2024. Through the Town’s Zoning By-laws, these uses can be permitted as-of-right on the lots where they are lawfully established.

In most cases, the importance of maintaining contiguous Employment Areas will prevail as a planning priority. However, where an area is dominated by non-industrial uses, retaining the economic function and flexibility of the area should be considered. This is

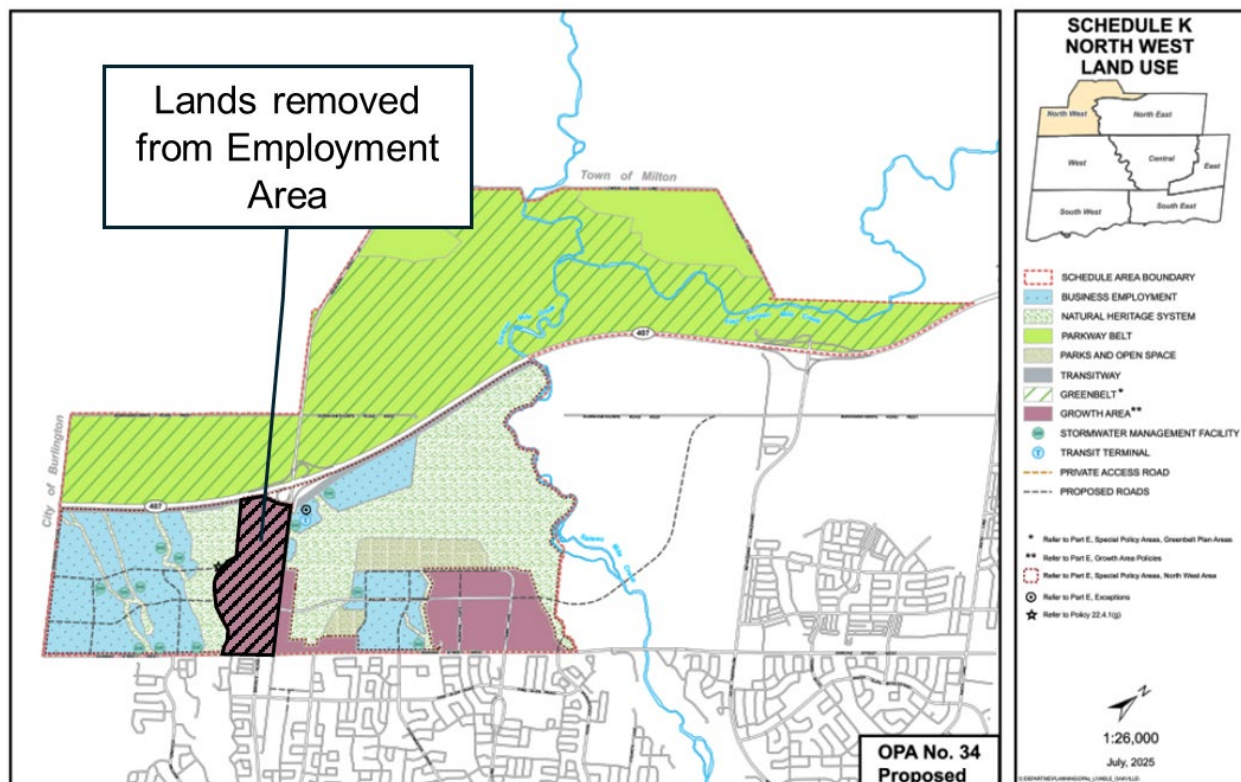


discussed more in section 4.2.3 of this report, and considered in the removals analysis in section 4.2.4.

2.2 Town of Oakville Official Plan Amendment 34

On July 16, 2025, the Ontario Land Tribunal (OLT) approved the Town's Official Plan Amendment 34 (O.P.A. 34), which was approved by Halton Region in 2023 but subsequently appealed. The overall effect of O.P.A. 34, as approved by the OLT, is to move the North West Oakville Secondary Plan area into the Town-wide L.O.P., including the Palermo Village Strategic Growth Area (S.G.A.). Pertinent to this study is the fact that O.P.A. 34, as amended by the OLT approval, moves certain lands to the west of Bronte Road to the Palermo S.G.A. (see Figure 3).

Figure 3
Town of Oakville
Lands removed from Employment Areas through O.P.A. 34



Source: Map derived from O.P.A. No. 34 by WSP.



3. Implementation of the Provincial Planning Statement, 2024 in the Greater Golden Horseshoe

This chapter builds on the brief review of current approaches to implementing the P.P.S., 2024 that was summarized in the Background Facts Report. The G.G.H. municipalities listed below have addressed the employment policies and definitions of the P.P.S., 2024 in varying ways. Given that the provincial policy approach to employment is new, the municipal approaches below do not exactly constitute “best practices,” but they provide helpful information to understanding how to implement the P.P.S., 2024. It is important to note that most G.G.H. municipalities’ O.P.A.s, including Oakville’s, have been exempt from Ministerial approval through regulation and are thus subject to appeal. Certain O.P.A.s may continue to be approved by the Minister of Municipal Affairs and Housing (MMAH) in an ad hoc manner.

In the Town of Oakville, Council passed by-laws 2024-143, 2024-244 and 2024-145, which adopted interim O.P.A.s 068, 332 as modified, and 333, respectively, on Tuesday, October 15, 2024. The purpose of the interim O.P.A.s is to retain the Town’s Employment Areas pending completion of the comprehensive Employment Areas Review. The O.P.A.s that will result from the directions of the Employment Areas Review will build on, strengthen, and replace the interim O.P.A.s. All three interim O.P.A.s were appealed to the OLT.

3.1 City of Toronto

Prior to the enactment of the P.P.S., 2024, the City of Toronto conducted several O.P.A.s to proactively address Bill 97 and the revised definition for “area of employment” in the *Planning Act*. O.P.A. 668, adopted in July 2023, ensured the continued use of excluded uses within Toronto’s Employment Areas, provided they were lawfully established. O.P.A. 680, adopted in July 2024, aligned policies for the City’s Employment Areas with the new *Planning Act* definition.

O.P.A.s 668 and 680 were subject to approval by MMAH, who rejected the O.P.A.s in part due to their lack of removal of Employment Area from the City’s O.P. In response, the City of Toronto analyzed Employment Area that could be suitable for removal and proposed potential locations that would be appropriate candidates. The lands deemed



suitable for removal are primarily office parks and areas that may act as buffers to sensitive land uses. These lands are occupied by uses considered institutional, commercial, retail, and office, as well as existing and planned office parks.

Arising from this additional analysis, the City adopted O.P.A. 804, which maintains the intent of O.P.A.s 668 and 680 in allowing for the continuation of uses lawfully established prior to October 2024 while removing the identified lands.

The lands that have been removed from the City's Employment Areas have been re-designated as Regeneration Areas. This designation allows for a diverse mix of commercial, residential, light industrial, parks and open spaces, institutional, live-work, and utility uses. The Regeneration Area can be broadly considered as permitting uses that may have traditionally been located within Employment Areas, such as automotive services and standalone offices. Large-scale retail stores and power centres are not permitted within the Regeneration Area. A Regeneration Area requires the completion of a Secondary Plan before development is permitted.

On May 22, 2025, the City of Toronto adopted O.P.A. 804 through By-law 477-2025, updating land use designations and policies for Employment Areas. This O.P.A. also repealed By-laws 2024-1107 and 2024-1108, effectively repealing O.P.A. 668 and O.P.A. 680. Notably, O.P.A. 804 redesignates 255 hectares of land designated General Employment Areas to Institutional Areas or Regeneration Areas. As of September 2025, the O.P.A. is pending Ministerial approval.

3.2 City of Mississauga

In October 2024, the City of Mississauga adopted O.P.A. 182 to bring its O.P. into conformity with the P.P.S., 2024. O.P.A. 182 is simple in its approach to conforming to the P.P.S., 2024, in that the amendment allows for the continuation of lawfully established uses that are excluded from being in an "area of employment." O.P.A. 182 did not remove lands from any Employment Areas; instead, it delineated former Regional Employment Areas as shown on Schedule E-4 (Employment Areas) of the former Peel Region O.P.

Through a site-specific appeal of O.P.A. 182 to the OLT, lands located at 2125 & 2145 North Sheridan Road have been removed from the City's Employment Areas. Through



the decision made by the OLT, it was determined that the removal was warranted, given:

“...their location at the periphery of the Sheridan Park Corporate Centre; the acceptable co-existence of these two hotels with adjacent residential and employment uses; and the opportunity for these sites, adjacent to an Employment Area, to be used for other uses supportive of an Employment Area.”^[8]

Further analysis on this decision can be found in section 3.8 of this report.

3.3 City of Hamilton

The City of Hamilton has not yet updated its O.P.s to conform to the P.P.S., 2024. In October 2024, City staff requested 18 months to complete a policy review and conduct the appropriate consultations to update the City’s O.P.s, as needed. Currently, there is no publicly available update on the status of this review.

3.4 City of St. Catharines

In September 2023, the City of St. Catharines implemented O.P.A. 40 to permit the continued use of lawfully established uses in Employment Areas prior to the adoption of the P.P.S. in 2024. No amendments to Employment Area delineations have been brought forth at this time.

3.5 City of Vaughan

The City of Vaughan’s draft new O.P., May 2025, has adopted the language of the P.P.S., 2024, permitting lawfully established uses and the new definition in section 1 of the Planning Act. Policy 2.2.4.5 of the draft O.P. establishes Employment Area conversion requirements that aim to protect the contiguous nature of the Employment Areas and protect Vaughan’s ability to support employment. Vaughan has also

^[8] OLT-24-001135, decision issued March 19, 2025.

<https://www.canlii.org/en/on/onlt/doc/2025/2025canlii27440/2025canlii27440.html?resultId=221da560a54c473f99e78defb0d9d8b7&searchId=2025-06-30T13:46:19:575/eb37495d19cc45888413d973b90bd6a7&searchUrlHash=AAAAQAHb3BhIDE4MgAAAAAB#Order>



proposed removing lands that are currently designated as Employment Commercial Mixed-Use from its Employment Areas. This designation currently permits a range of non-residential uses, including industrial uses, as well as office, hotels, retail, and cultural and entertainment uses. The City's draft new O.P. re-designates these lands as Non-Residential Mixed-Use, which permits the same uses but is not within delineated Employment Areas.

3.6 City of Pickering

The City of Pickering is currently undergoing a review of its O.P. and has produced various discussion papers, including one from November 2024,^[9] which touches on the new definition of Employment Area but does not provide any policy suggestions. The City's Growth Management Study^[10] from May 2025 highlights a need for the O.P. to conform with the P.P.S., 2024 and suggests some high-level policy directions, such as adopting the revised definition of Employment Area, establishing a Lawfully Permitting policy, and implementing the 300-metre buffer. There have been no official policy adoptions by the City of Pickering at this time.

3.7 Town of Milton

In November 2024, the Town of Milton implemented Local Official Plan Amendment (L.O.P.A.), L.O.P.A.-08/24, and Zoning By-law Amendment (Z.B.L.A.), Z.B.L.A.-20/24. The L.O.P.A. updated the definition and policies for "Employment Areas" to ensure consistency with the P.P.S., 2024, which restricts certain institutional and commercial uses and updates Employment Area definitions and policies. The L.O.P.A. removed lands designated as Office Employment Area, Business Commercial Area, and Prestige Office Area from the Employment Area overlay, redesignating them as "Commercial Area". The "Commercial Area" designation is intended to recognize the land uses' supportive function to Employment Areas and includes policies that prohibit residential development. Accordingly, Milton also revised mapping and policies for Secondary Plan areas. The Town also revoked outdated regional policies, ensuring that Employment Areas are protected for long-term job growth and that lawfully established

^[9] Pickering Official Plan Review: Growth Management & urban structure Discussion Paper, November 2024.

^[10] City of Pickering Growth Management Strategy, Final Report, May 2025, prepared by Watson & Associates Economists Ltd., in association with WSP.



uses prior to October 20, 2024, may continue. Two privately-initiated O.P.A.s are currently underway to remove lands from the Town's Employment Areas.

3.8 Observations

Currently, only a handful of the reviewed municipalities have significantly addressed the new policies of the P.P.S., 2024. In most cases, amendments to Employment Area policies in these municipalities have focused on implementing the P.P.S., 2024 language for Employment Areas while continuing to permit lawfully established uses through transitional provisions.

At present, only the City of Toronto and the Town of Milton have actively amended land use policies to remove lands from their Employment Areas. While the City of Vaughan's draft new O.P. has identified Employment Area removals, these changes will ultimately be subject to the Provincial review upon adoption and submission for approval.

This general lack of implementation to date does not necessarily indicate that municipalities intend to rely on the "lawfully existing" provision without making further changes. There is emerging evidence that municipalities are considering more comprehensive reviews of their Employment Areas and amendments to their respective O.P.s. Nevertheless, the amount of land removed from Employment Areas in Toronto and Milton has been limited in scope. It should also be noted that while Mississauga did not remove lands from Employment Areas through O.P.A. 182, the City's prior implementation of the Peel Region O.P. did result in some removals. This is a similar situation to the removal of lands in Employment Area through the OLT's approval of Oakville O.P.A. 34, as described in section 2.2 of this report.

Two other key takeaways can be considered based on decisions from the Province and the OLT. Firstly, the Province's refusal to approve Toronto's initial approach to maintaining its Employment Areas through O.P.A.s 668 and 680 suggests an expectation that municipalities undertake a meaningful and rational review of Employment Area boundaries. This includes considering the removal of lands where justified, despite the transitional provisions outlined in subsection 1(1.1) of the *Planning Act* on the Province's and O.L.T.'s review of Toronto's and Mississauga's O.P.A.s, respectively, and the Province's stated intents to enable more housing and prioritize industrial employment uses, the Town of Oakville may consider scoped Employment Area removals.



Secondly, the OLT decision regarding 2125 and 2145 North Sheridan Way in the City of Mississauga establishes an important precedent for site-specific deliberations on Employment Area removals. Although OLT decisions are not legally binding for future cases, the criteria applied in that decision are likely to influence future appeals and rulings.

The Town's decisions regarding the removal of lands in Employment Lands should be grounded in sound and defensible planning principles developed through this study, as opposed to planning for potential provincial and OLT decisions. Nevertheless, the decisions referenced above provide important context for understanding the evolving policy environment and the Province's intent in introducing the new Employment Area policies under Bill 97, the P.P.S., 2024, and the *Planning Act*.



4. Town of Oakville Employment Lands

As noted in the *Financial and Market Analysis Report*,^[11] there are seven distinct areas within the Town of Oakville, including:

- Burloak;
- Northeast Oakville ;
- Northwest Oakville ;
- Oakville Q.E.W. ;
- Oakville Q.E.W. ;
- Speers/Cornwall Corridors; and
- Winston Park.

These key Employment Lands are strategically located along major transportation corridors, including Highways 403 and 407, the Queen Elizabeth Way (Q.E.W.), and GO Transit lines. As noted in the *Financial and Market Analysis Report*, these areas support a wide range of industrial, office, and mixed-use developments, serving as key hubs for job creation and business activity.

4.1 Development Activity

4.1.1 Historical Employment Land Absorption

Figure 4 on the following page provides a summary of the annual Employment Land absorption (i.e. construction activity) for the Town of Oakville since 2015. Key observations include the following:

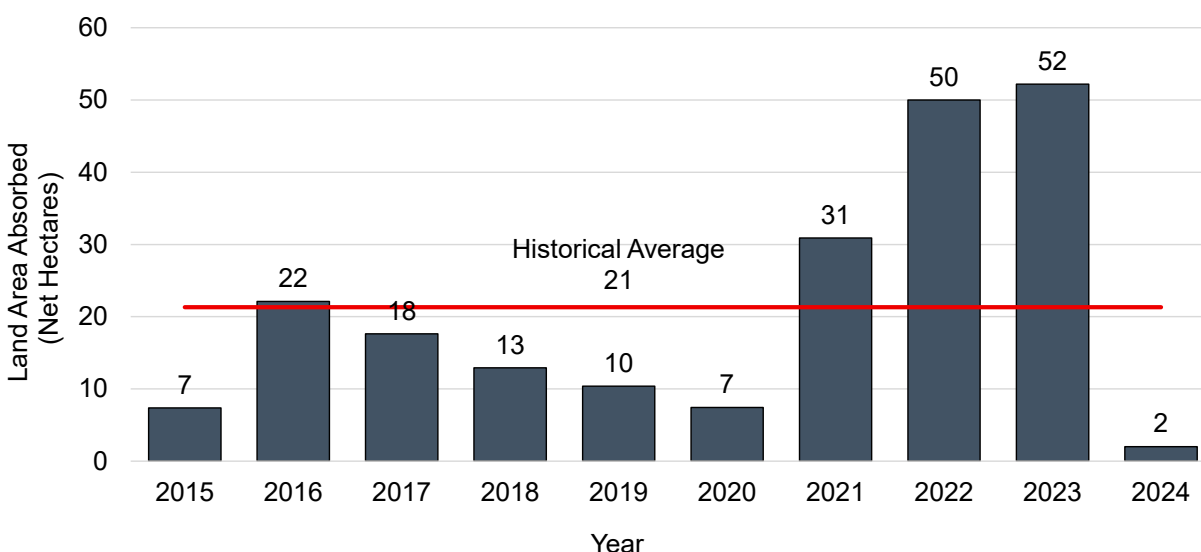
- Land absorption has varied over the past decade in the Town of Oakville. Between 2015 and 2019, the Town averaged 14 hectares per year. Since 2020, land absorption in Employment Lands has increased, averaging 29 hectares per year.
- Between 2015 and 2019, lands absorbed were largely associated with office-type development within the Burloak and Oakville Q.E.W. East and the Speers/Cornwall Corridor.

^[11] Background Facts Report, Employment Areas Review, May 2025, Town of Oakville.



- As noted in the *Financial and Market Analysis Technical Report*, 2022 and 2023 represented peak years of development activity in the Town, with Employment Lands absorbing approximately 50 hectares and 52 hectares each year, respectively, of land largely associated with industrial development.

Figure 4
Town of Oakville
Annual Employment Land Absorption, 2015 to 2024



Note: Figures have been rounded. Please note that 2024 is reflective up until June 30, 2024.
Source: Derived from Town of Oakville updated building permit information by Watson & Associates Economists Ltd.

4.1.2 Industrial Building Construction Activity

As noted in the *Financial and Market Analysis Technical Report*, the Town of Oakville has experienced steady industrial development over the past decade. Figure 5 illustrates the amount of industrial development activity on Employment Lands. Figure 6 illustrates the industrial activity type. Key observations include the following:

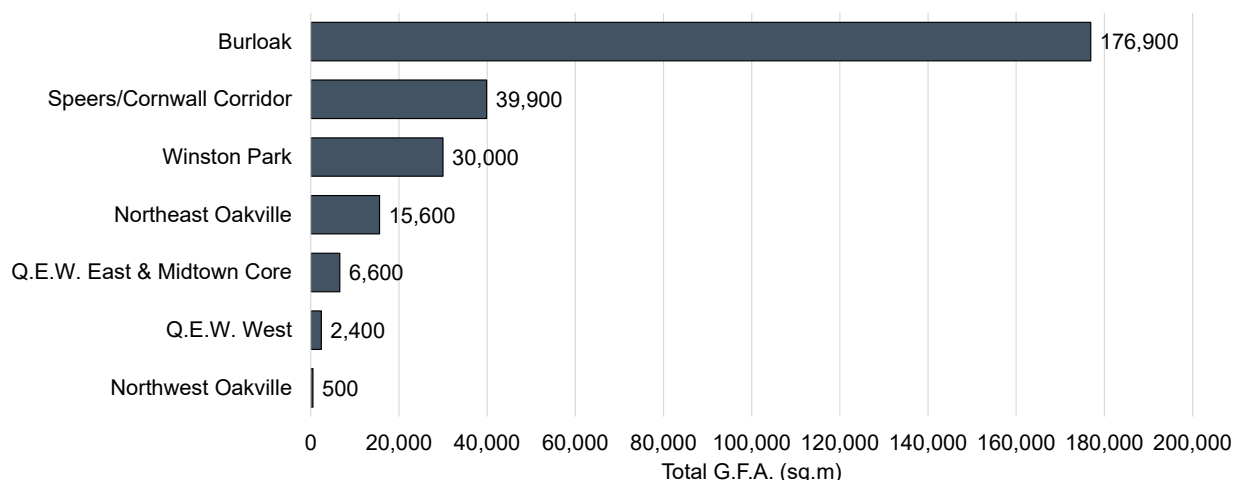
- Burloak experienced the most development activity associated with new speculative industrial space, reflecting strong market demand even in the absence of pre-secured tenants.
- Following Burloak, the Speers/Cornwall Corridor added 39,900 sq.m (429,500 sq.ft.) of new industrial space, and Winston Park added 30,000 sq.m (322,900 sq.ft.) of new industrial space.



sq.ft.) of new industrial space. In both areas, new industrial construction was comprised of one-storey industrial buildings used for warehousing purposes.

- The Northeast Oakville Employment Areas experienced similar industrial development activity, adding approximately 15,600 sq m (167,900 sq ft.) of new industrial space, which consisted of multi-tenant industrial buildings.
- The remaining Employment Lands in Oakville, such as the Oakville Q.E.W. East and the Oakville Q.E.W. West, experienced minimal industrial development activity, as these areas are largely occupied.
- Over the past decade, most of the industrial development activity (i.e., 88%) in Employment Areas was entirely new builds rather than expansions or additions to existing structures, suggesting a trend towards large-scale development rather than intensification of existing sites.

Figure 5
Town of Oakville
New Industrial Floor Space, Gross Floor Area (sq.m), 2015 to 2024^[1]



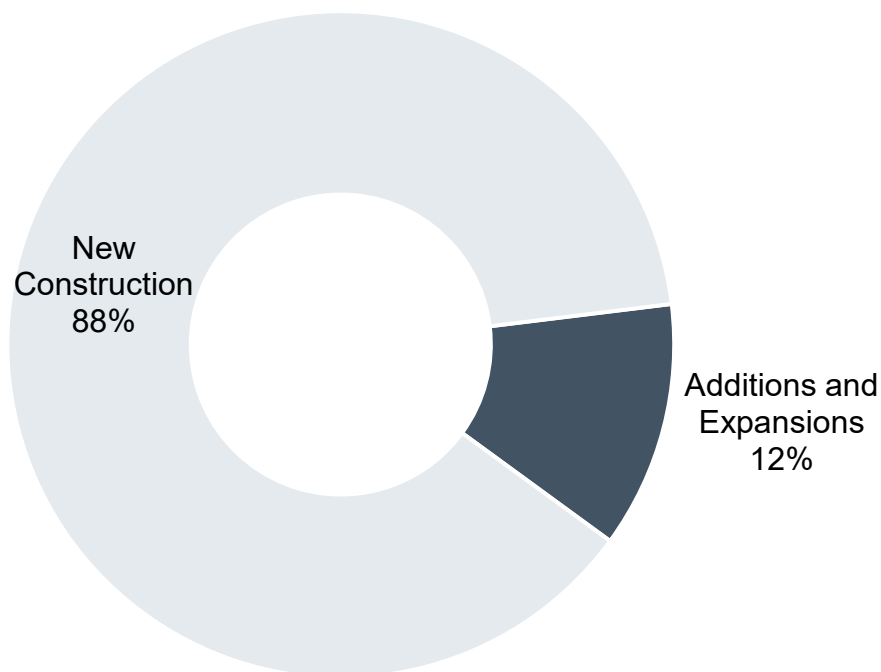
^[1] Reflects non-residential building permits until end of June 2024.

Note: The non-residential development activity (sq.m) metric contains new construction and additions/expansions and is net of demolitions. The Hospital District and the Oakville Q.E.W. East are not shown because there has been no development activity over the period. Figures have been rounded. G.F.A. means gross floor area.

Source: Derived from Town of Oakville non-residential building permit data, 2015 to 2024, and summarized by Watson & Associates Economists Ltd.



Figure 6
Town of Oakville
Industrial Development by Activity (sq.m), 2015 to 2024^[1]



^[1] Reflects non-residential building permits until end of June 2024.

Note: The non-residential development activity (sq.m) metric contains new construction and additions/expansions and is net of demolitions. Figures have been rounded.

Source: Derived from Town of Oakville non-residential building permit data, 2015 to 2024, and summarized by Watson & Associates Economists Ltd.

4.1.3 Office Development Activity on Employment Lands

Figure 7 and Figure 8 summarize office development activity over the past decade in the Town of Oakville. Office development encompasses small to mid-sized multi-tenant office buildings, as well as larger single-tenant and multi-storey buildings.^[12] Key observations include the following:

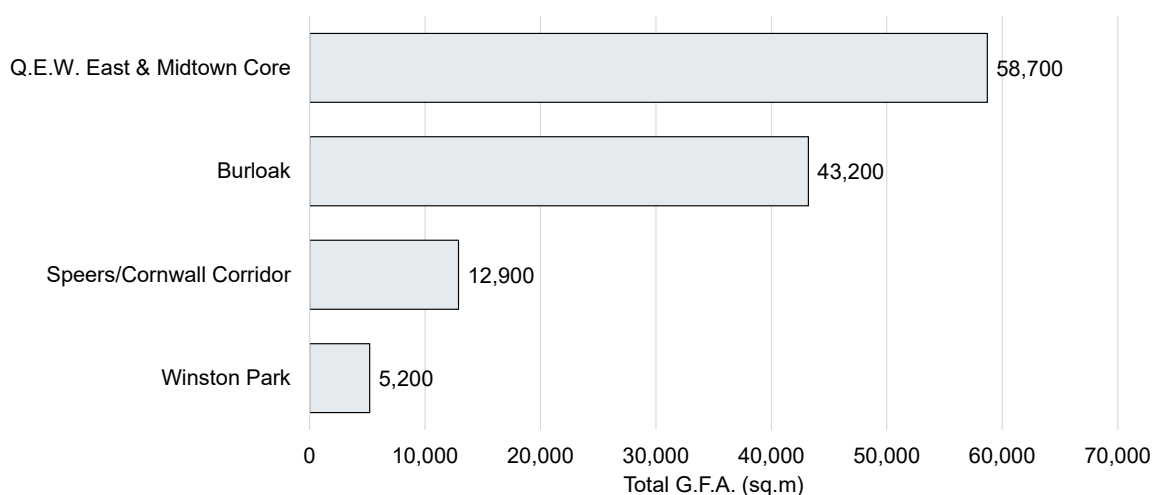
- Over the past decade, the Q.E.W. East & Midtown Core has accommodated the most office development, with approximately 58,700 sq.m (631,800 sq.ft.).

^[12] The office development figures are based on the Town of Oakville's building permit data categorized as 'office.' These figures may include ancillary office uses and therefore may not fully align with the Provincial definition of 'area of employment.'



- Following the Q.E.W. East & Midtown Core, Burloak has added approximately 43,200 sq.m (465,000 sq.ft.).
- The remaining areas, such as the Speers/Cornwall Corridor and Winston Park , have experienced some new development activity, but not as strong as the above-mentioned two areas.
- Similar to industrial development, new construction represents the majority of the construction activity, accounting for 98% of the total office development activity, while additions and expansions account for 2% of development activity.

Figure 7
Town of Oakville
New Office Floor Space, Gross Floor Area (sq.m), 2015 to 2024^[1]



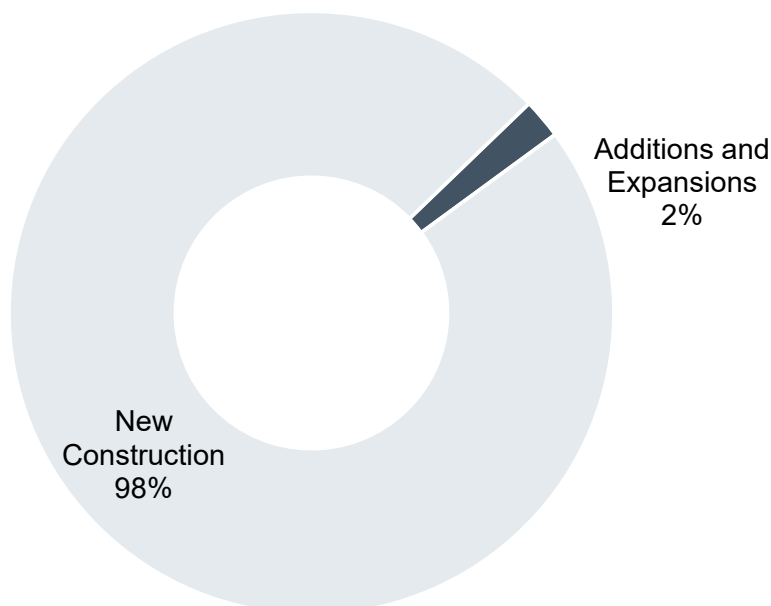
^[1] Reflects non-residential building permits until end of June 2024.

Note: The non-residential development activity (sq.m) metric contains new construction and additions/expansions and is net of demolitions. The Hospital District, the Northeast and Northwest Oakville , and the Oakville Q.E.W. East and West are not shown because there was no development activity over the period. Figures have been rounded. G.F.A. means gross floor area.

Source: Derived from Town of Oakville non-residential building permit data, 2015 to 2024, and summarized by Watson & Associates Economists Ltd.



Figure 8
Town of Oakville
Office Development by Activity, Gross Floor Area (sq.m), 2015 to 2024^[1]



^[1] Reflects non-residential building permits until end of June 2024.

Note: The non-residential development activity (sq.m) metric contains new construction and additions/expansions and is net of demolitions. Figures have been rounded.

Source: Derived from Town of Oakville non-residential building permit data, 2015 to 2024, and summarized by Watson & Associates Economists Ltd.

While the Town of Oakville has experienced office development over the past decade, Major Office development^[13] (i.e., greater than 1,900 sq.m. or 20,000 sq.ft.) have mainly been focused on Employment Lands; only a few major office developments have occurred within an S.G.A.

^[13] Please refer to Glossary in Appendix A.



4.2 Employment Areas Removals

Changing a land use designation to allow for uses not included under the revised and more narrow provincial definition of an Employment Area is considered an Employment Area removal in accordance with the P.P.S., 2024. Subsection 2.8.2.5 of the P.P.S., 2024 states:

“Planning authorities may remove lands from employment areas only where it has been demonstrated that:

- a) there is an identified need for the removal and the land is not required for employment area uses over the long term;
- b) the proposed uses would not negatively impact the overall viability of the employment area by:
 - 1) avoiding, or where avoidance is not possible, minimizing and mitigating potential impacts to existing or planned employment area uses in accordance with policy 3.5;
 - 2) maintaining access to major Goods Movement facilities and corridors;
- c) existing or planned infrastructure and public service facilities are available to accommodate the proposed uses; and
- d) the municipality has sufficient employment lands to accommodate projected employment growth to the horizon of the approved official plan.”^[14]

Subsection 2.8.2.5 (above) builds on the previous Employment Area conversion policies as set out in subsection 1.3.2.5 of the P.P.S., 2020, with additional emphasis provided with respect to viability in terms of land use compatibility and access (subsection 2.8.2.5 paragraph b)), as well as a new criterion pertaining to the long-term sufficiency of the Employment Area land supply within a municipality.

Notwithstanding the use of the term “removal” in subsection 2.8.2.5 of the P.P.S., 2024, through the analysis of this study, it is our professional opinion that there should be a distinction drawn between a site-specific removal (what would have previously been called a “conversion,” and usually privately initiated) and the broader removals to be

^[14] Section 2.8.2., Employment Areas, Provincial Planning Statement, 2024, p. 14.



considered for conformity with the new *Planning Act* and the P.P.S., 2024 definitions of “area of employment” and “employment area”, respectively. In particular, as established in section 2.1 of this report, the function of many sub-areas within Employment Areas is not currently supporting manufacturing and warehousing employment and may not be likely to in the future.

Accordingly, there is a need to establish specific guiding criteria for considering and evaluating the removal of lands from the Town’s Employment Area that build on the P.P.S., 2024, but that are suited to the local economic and land use context of the Town of Oakville.

4.2.1 Establishing Current Function of the Town’s Employment Lands

Before considering removals from the Town’s Employment Lands, it was necessary to determine the current function and makeup of land uses in those areas, and specifically, which municipal parcels are supporting uses that comply with the new *Planning Act* definition for Employment Areas. This work was undertaken using the 2023 Halton Region Employment Survey as a basis. The survey collected a range of point-based geographic information system data for businesses across Halton Region, including business name and type, location, number of employees, and facility size. This data is collected from thousands of businesses on a voluntary basis, and even with ground-truthing, is prone to certain gaps (e.g., some businesses not being included in the survey for a variety of reasons), and does not distinguish between ancillary uses (which could be compliant under the new definition) and primary uses. For this reason, the survey data was only used to identify general trends within Employment Lands and not relied on for accuracy on a site-by-site basis.

WSP identified the function of Employment Lands using the following methodology:

- 1. Classify businesses in the Employment Survey as meeting or not meeting the new *Planning Act* definition based on the North American Industry Classification System (NAICS) two-digit category:**
 - a. Meeting: 31-33 (Manufacturing), 41 (Wholesale trade), and 48-49 (Transportation and wholesaling); 21 (Mining, Quarrying and Oil & Gas Extraction); 22 (Utilities); 23 (Construction); and, 56 (Waste Management and Remediation Services)



- b. Not meeting: all other NAICS codes.
2. **Clip the 2023 Halton Region Employment Survey data to include only those points within the Town's existing Employment Areas.**
3. **Attach point data to municipal assessment parcels.** In many cases, this resulted in multiple points being attached to a single parcel, where that parcel was supporting multiple businesses and/or buildings. In these cases, there was often a combination of compliant and non-compliant uses.
4. **Ground-truth the data.** Town staff examined the data produced by Step 3 and verified it against real-world uses in the Town.
5. **Determine the general function of the Employment Land based on the subsectors that are present.** Based on Steps 1 through 4, WSP was able to assess the overall current function of the given Employment Area (e.g., if an area was currently supporting commercial uses rather than industrial uses.)

Using the information generated through this methodology, the project team was able to identify potential land removals from Employment Lands. This task was informed by criteria, described in subsection 4.2.2 and 4.2.3.

4.2.2 Core Principle for Evaluating Employment Area Removals

Based on provincial policy direction, the analysis of the existing function of Employment Areas in section 2.1, and analysis of implementation of the P.P.S., 2024, in neighbouring municipalities, the following core principle was established for evaluating lands within the Town's Employment Lands for removal.

Core Principle: Retain Employment Areas in proximity to major transportation corridors and Goods Movement infrastructure, and maintain the configuration, location, and contiguous nature of Employment Areas to prevent their fragmentation.

As directed by policies in subsection 2.8.2 of the P.P.S., 2024, the Town is obligated to plan for, protect, and preserve Employment Areas for current and future uses. The P.P.S., 2024, further directs that Employment Areas should be planned for uses that require those locations, whether that be due to land use compatibility considerations, proximity to major Goods Movement facilities and corridors, or proximity to other connected uses. The criteria for this requirement are not directly specified in the P.P.S.,



2024, beyond proximity to major Goods Movement facilities or corridors; however, the contiguity of the Employment Area is paramount. Removing lands within an otherwise contiguous Employment Areas (i.e., creating a “hole” in the area) introduces a higher potential for conversion to non-compatible uses and encroachment on the industrial function of the Employment Area. Simply removing non-compliant lands from Employment Areas would create many instances of these holes and threaten the viability of the entire Employment Areas; therefore, this was not considered as an option.

Contiguity, in this case, generally refers to blocks or clusters of blocks bounded by roadways and/or rail corridors. Where a block is generally functioning within the *Planning Act* definition, it is recommended to remain within the Town’s Employment Area, with lawfully established non-compliant uses permitted as-of-right.

Where a block is serving a broader variety of uses than listed in section 1(1) of the *Planning Act*, further criteria were required to determine the appropriate path forward. These are described in section 4.2.3 below.

4.2.3 Additional Employment Area Evaluation Criteria

Given that there is a broad range of compliant and non-compliant uses across the Town, a certain level of discretion is required, based on the evaluative criteria established below, to decide which lands are retained or removed.

For those blocks or areas with a mix of existing compliant and non-compliant uses, an additional criterion was used to consider lands for removal. Lands that met the criteria below were recommended for removal.

- If the majority of lands in the area support non-industrial uses (e.g., retail or service commercial uses in former industrial buildings), and the retention of such lands would limit the continuation of the area’s established function;
- If a removal would maintain or improve the employment function and job potential of the Employment Area and support flexibility for non-industrial uses;
- If lands are located on the fringe of an assembly of Employment Area;
- If removal of the lands would not impede direct access to major transportation corridors and Goods Movement infrastructure (e.g., along a high-traffic truck route);



- If lands are adjacent to existing or future residential or mixed-use development, including S.G.A.s and Residential Areas, and removal would support land use compatibility (i.e., where a buffer area between sensitive land uses and manufacturing/warehousing uses is justified;
- If new manufacturing/warehousing uses through redevelopment of the lands would be limited due to size, configuration, access, physical conditions, and/or servicing constraints;
- If the removal of the lands would not compromise the overall supply of large Employment Area sites at the Town of Oakville level; and
- The long-term employment needs of the Town have been considered across a broad range of industrial-type and employment-supportive uses within commercial and institutional sectors.

The core principle and these additional criteria were applied to the Town's Employment Lands to identify the removals proposed below in subsection 4.2.4.

4.2.4 Evaluation of Proposed Employment Area Removals

The lands that are suitable candidates for removal, based on the evaluation criteria described above, are listed below, organized by Employment Land or sub-area.^[15]

4.2.4.1 Burloak Area

The Burloak area (Figure 9) is characterized by large parcels supporting the majority of compliant uses. In particular, the Suncor Oakville Terminal occupies the eastern half of the area, and several large distribution centres have been developed in the western half of the area in recent years.

It is recommended to retain most lands in the Burloak Area.

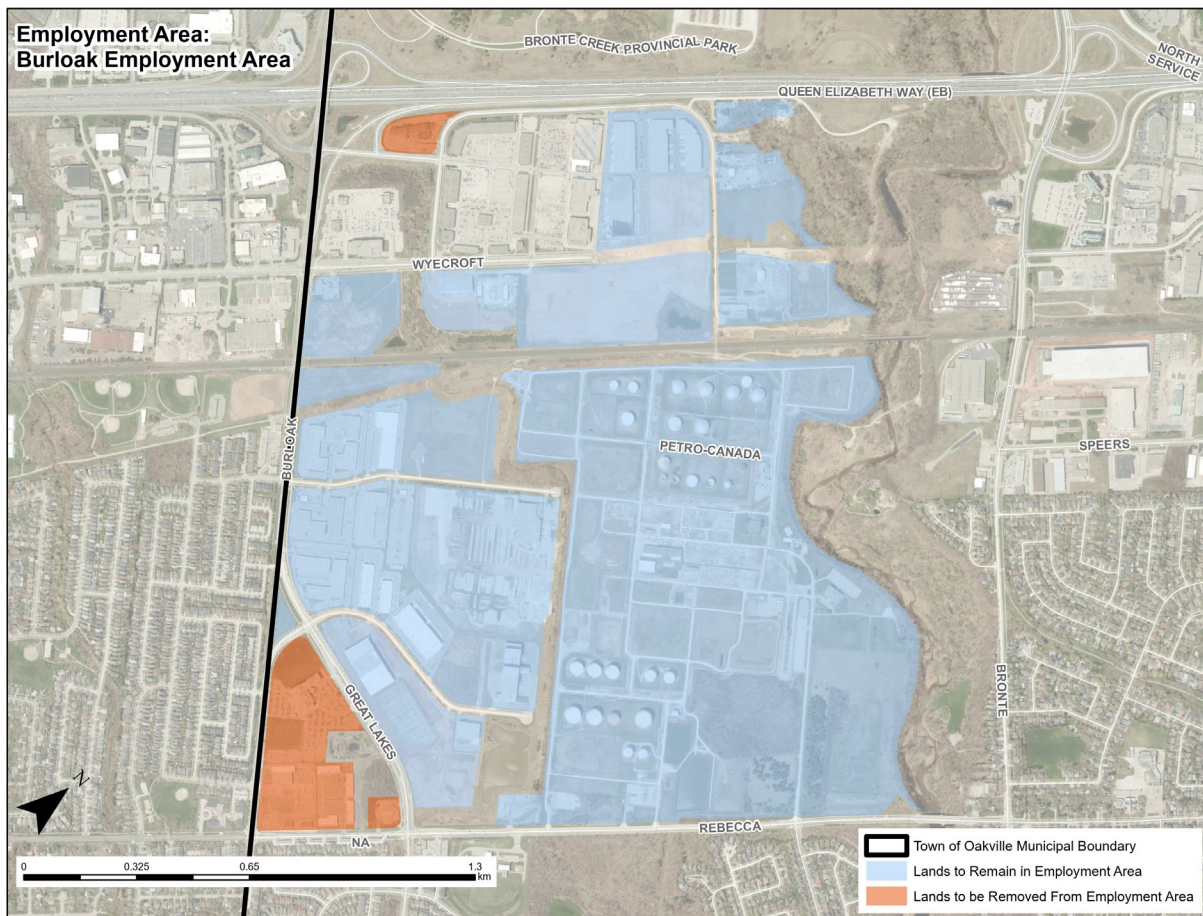
The only exception to these uses is a cluster of institutional, retail, and service commercial uses in the southwest corner of the area, as well as one site in the northwest corner. As these lands are on the edge of the Burloak Area and do not

^[15] Please note that in this section, cardinal directions of north, south, east, and west are used for simplicity, and mapping is oriented to place Lake Ontario generally to the south.



currently support compliant uses, **it is recommended to remove these lands from this area.**

Figure 9
Town of Oakville
Proposed Removals in the Burloak Area



4.2.4.2 Oakville Q.E.W. West Area

The Oakville Q.E.W. West Area (Figure 10) is characterized by a mix of parcel sizes and land uses, both compliant and non-compliant. This area is also divided by the Bronte GO Major Transit Station Area (M.T.S.A.), whose lands have already been removed from Employment Area.

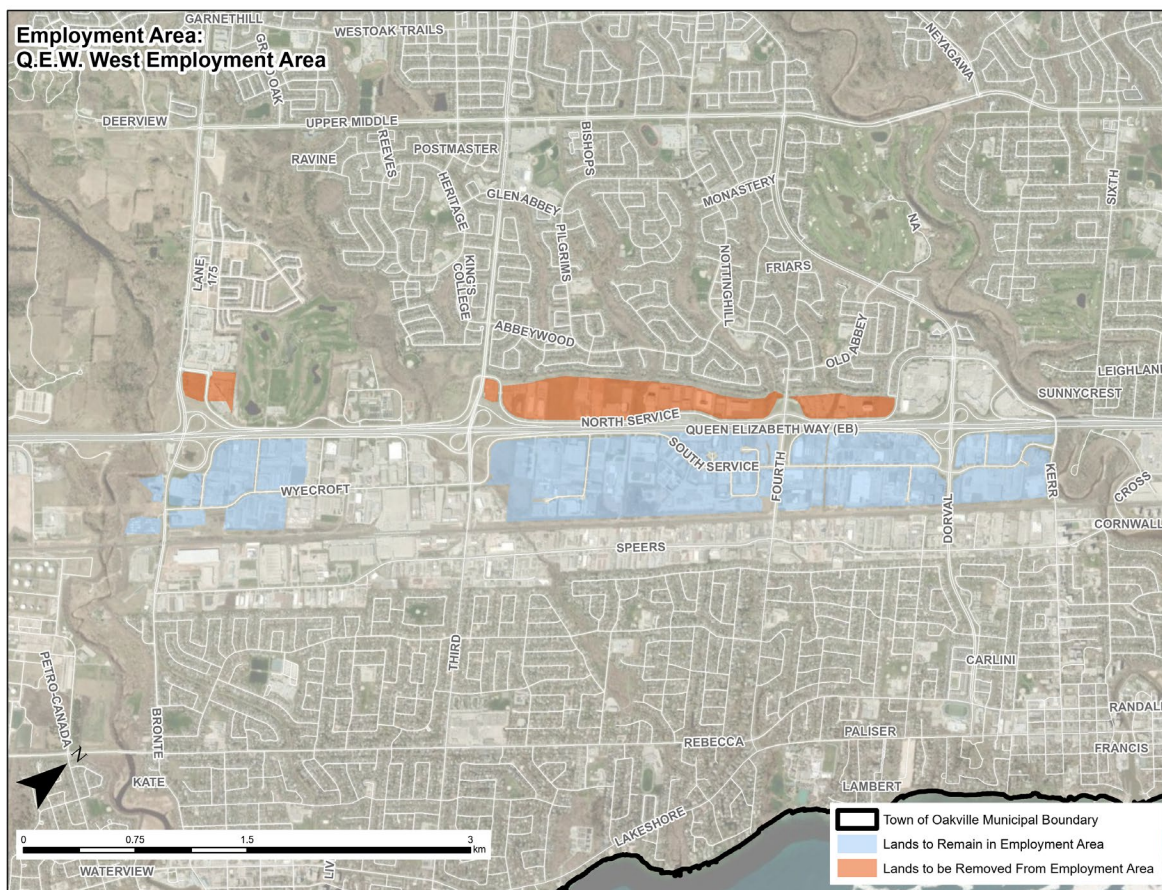
These lands supports several public facilities, including the Town's Parks, Roads, and Works Central Operations depot. Lands south of the Q.E.W. and west of the Bronte GO M.T.S.A. are generally made up of larger parcels with a variety of warehousing and



industrial uses, including substantial outdoor storage. Lands to the west of the Bronte GO M.T.S.A., north and south of Wyecroft Road, are larger in parcel size and support a range of uses. **It is recommended to retain these lands as Employment Areas.**

Lands to the north of the Q.E.W. along North Service Road are non-compliant, including several auto dealerships, as well as the Halton Police Board. **These lands are recommended for removal.**

Figure 10
Town of Oakville
Proposed Removals in the Oakville Q.E.W. West Area

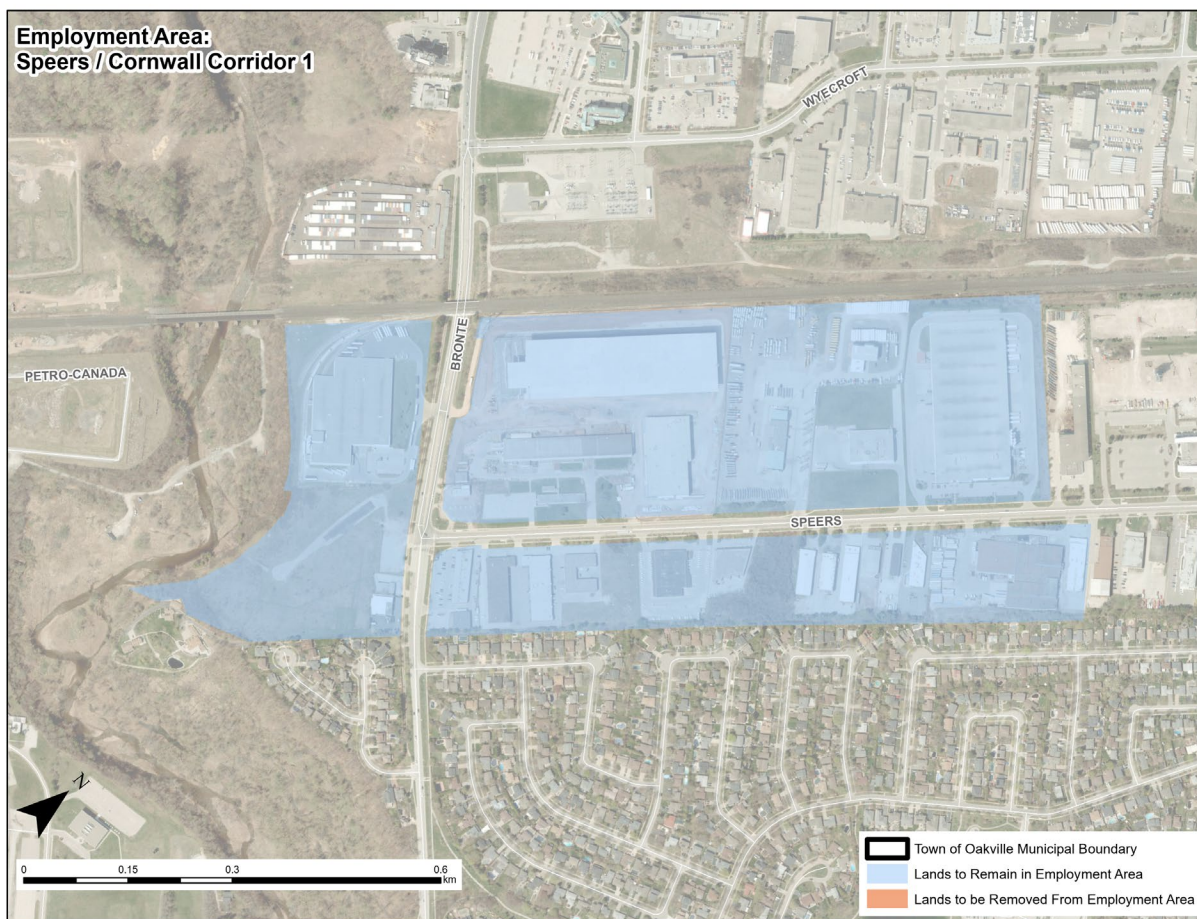




4.2.4.3 Speers/Cornwall Corridor Area

Lands in the Speers/Cornwall Corridor 1 (Figure 11) are varied in parcel size and support most compliant uses. **These lands are recommended for retention.**

Figure 11
Town of Oakville
Proposed Removals in the Speers/Cornwall Corridor 1 Area



Lands in Speers/Cornwall Corridor 2 (Figure 11) are characterized by smaller parcel sizes, particularly on the south side of Speers Road, and support a wide range of uses, with a substantial portion of uses not meeting the new *Planning Act*/P.P.S., 2024 definition, including non-compliant auto-related uses, indoor recreation, health services, and employment-supportive uses, including restaurants.

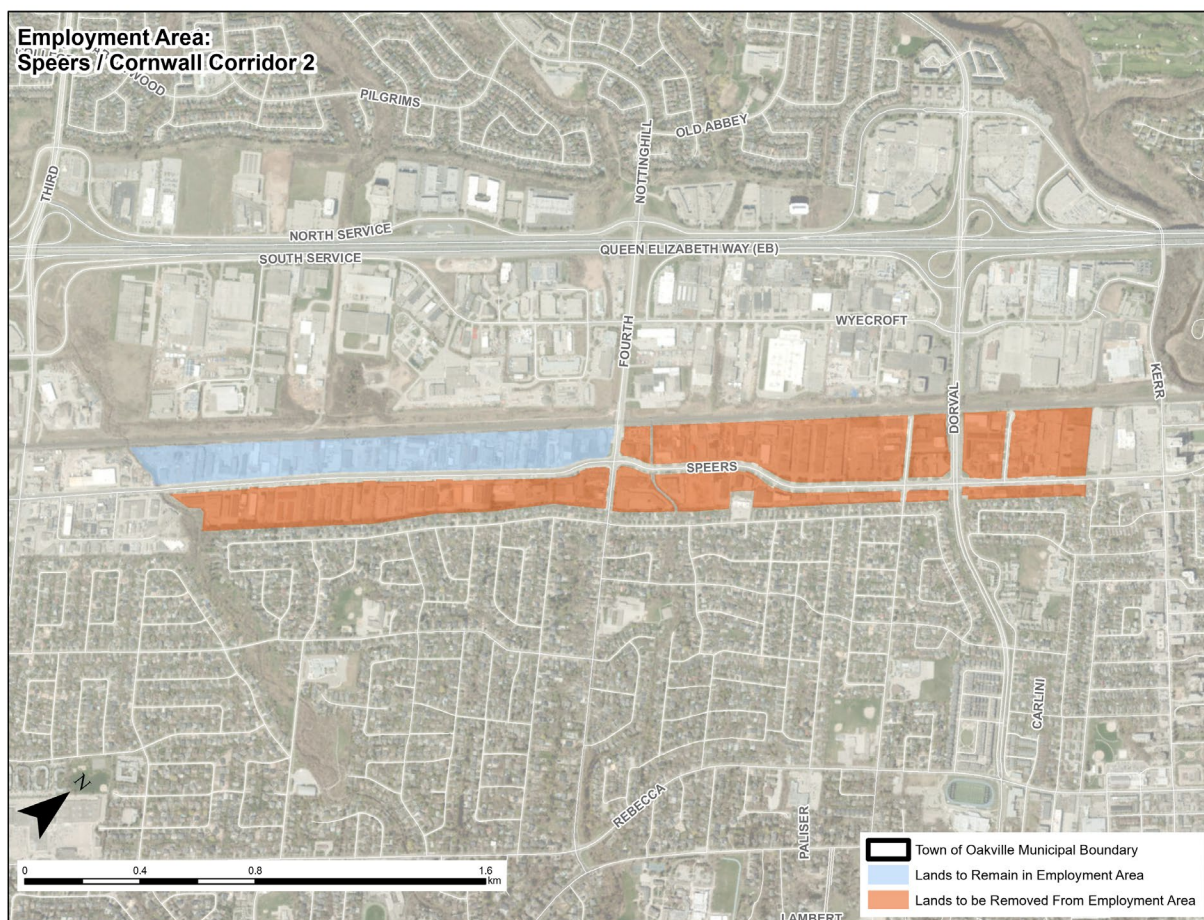


Lands to the south of Speers Road are directly adjacent to a Residential Area and offer an opportunity for a buffer between these residential uses and the remaining heavier industrial lands in the north. **These lands are recommended for removal.**

Lands to the north of Speers Road and east of Fourth Line, are adjacent to a rail corridor and consist of large lots. However, many of the uses in this area do not meet the *Planning Act* definition of Employment Area. Therefore, **these lands are recommended for removal.**

Lands north of Speers Road and west of Fourth Line currently support compliant uses, and as a result, **these lands are recommended for retention.**

Figure 12
Town of Oakville
Proposed Removals in the Speers/Cornwall Corridor 2 Area





Lands in Speers/Cornwall Corridor 3 (Figure 13 and Figure 14) are characterized by a mix of parcel sizes and land uses. North of Cornwall Road in the western part of this area is a range of compliant uses, which also directly abut C.N. Rail's Oakville Yard. The majority of lands in the eastern part of this area, particularly west of Ford Drive, currently support compliant uses and are bounded to the north and south by a rail corridor or rail spur, and to the east and west by arterial roads that provide easy access to both the Q.E.W. and Highway 403, as well as other Employment Areas in both Oakville and Mississauga. **These lands are recommended for retention.**

Lands to the south of Cornwall Road in the western part of this area (see Figure 13) currently support a range of non-compliant uses. Lot sizes in this area are shallow and/or irregular, and are directly adjacent to low-rise residential uses, making them unfavourable for future industrial development. **These lands are recommended for removal.**



Figure 13
Town of Oakville
Proposed Removals in the Speers/Cornwall Corridor 3A Employment Area

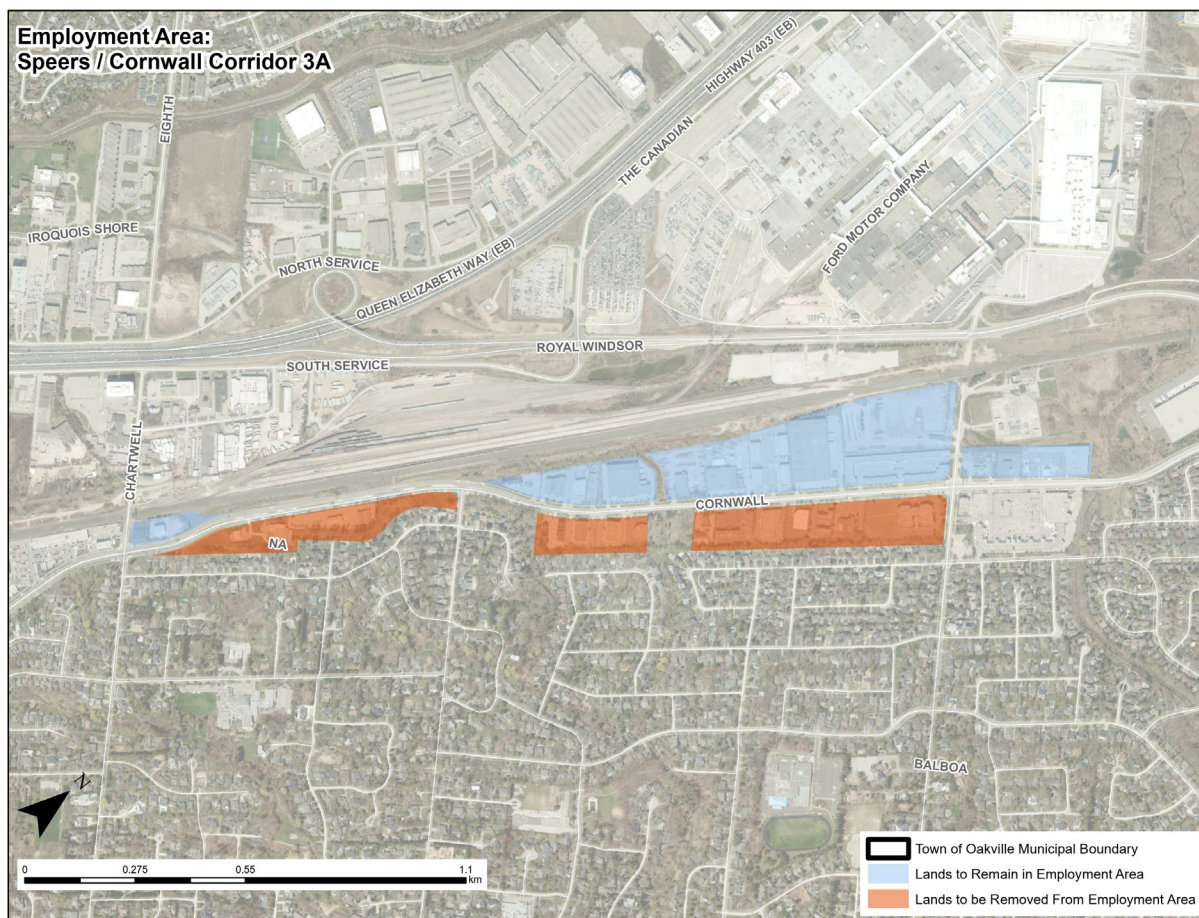
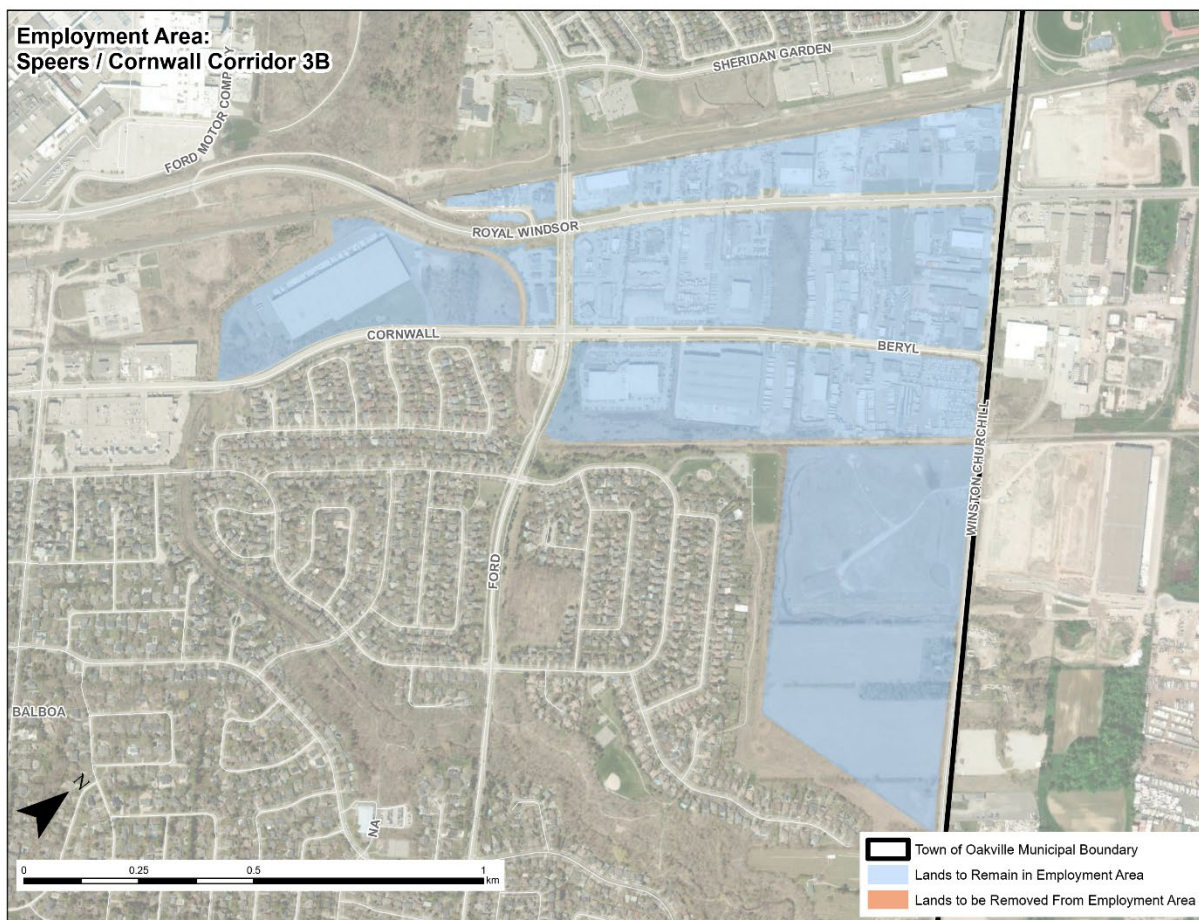




Figure 14
Town of Oakville
Proposed Removals in the Speers/Cornwall Corridor 3B Employment Area



4.2.4.4 Oakville Q.E.W. East & Midtown Core

The Q.E.W. East & Midtown Core (Figure 15) consists of several areas supporting a variety of parcel sizes and uses. The most notable site in this area is the Ford Assembly Complex, **which is recommended for retention.**

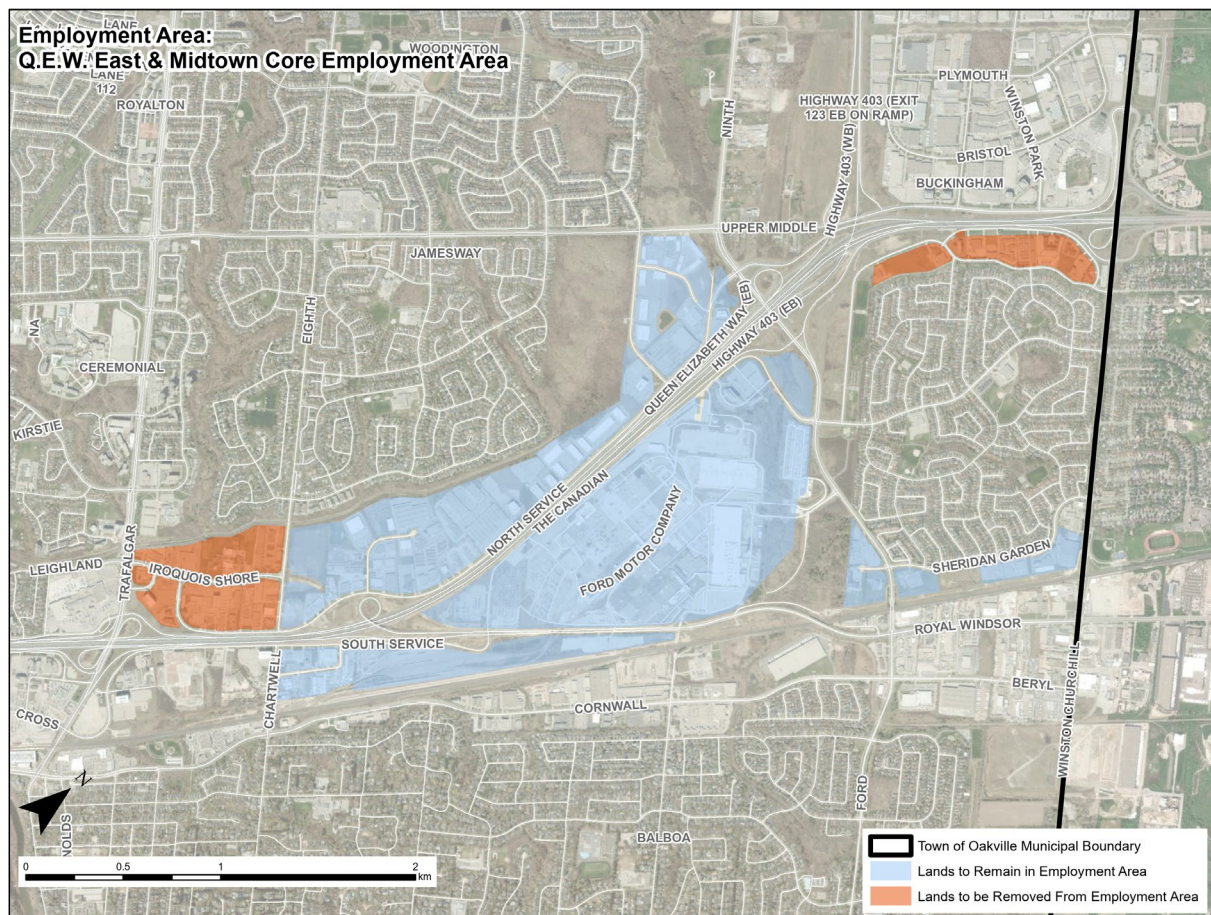
Lands to the northwest of the Ford Assembly Complex across the Q.E.W. support a mix of uses, including a cluster of low-rise office uses along North Service Road and Joshua Drive. Lands to the south of the Ford Assembly Complex across Royal Windsor Drive current support majority compliant uses, including C.N. Rail's Oakville Yard. **These lands are recommended for retention.**



The remainder of the lands in the Q.E.W. East & Midtown Core area comprises two small groupings of lands that act as buffers between a large Residential Area and the Q.E.W. and the Metrolinx rail corridor, respectively. Lands that are south of the Q.E.W. west of Winston Churchill support commercial uses and is characterized by smaller lot sizes, as a result, **these lands are recommended for removal**.

Lands along Sheridan Garden Drive support a mix of uses, including several large institutional uses, however, the lot fabric in this area is highly favourable to future industrial uses, as a result **these lands are recommended for retention**.

Figure 15
Town of Oakville
Proposed Removals in the Oakville Q.E.W. East & Midtown Core Employment Area



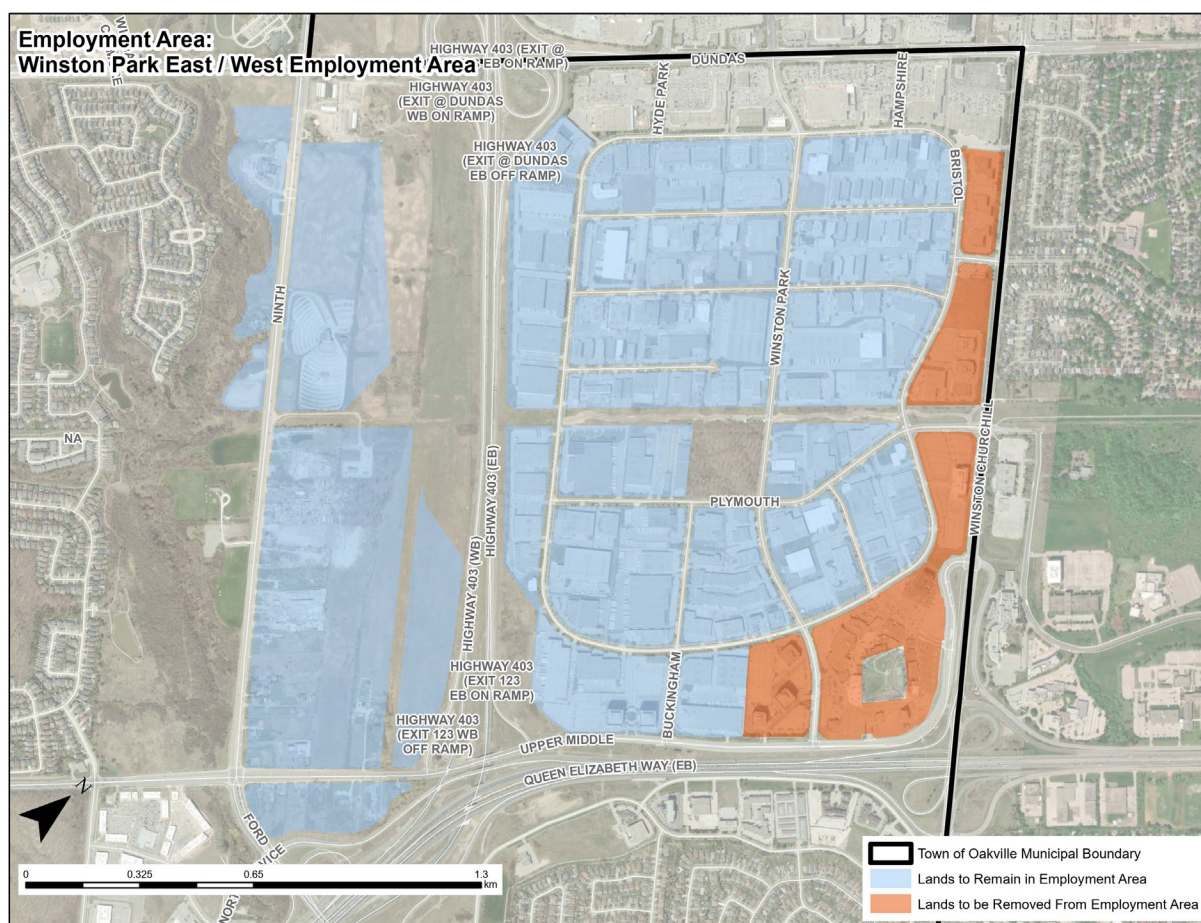


4.2.4.5 Winston Park Area

The Winston Park Area (Figure 16) are characterized by a variety of parcel sizes that support compliant uses. **These lands are recommended for retention.**

The exception to this retention is certain lands between Bristol Circle and Winston Churchill Drive that support non-compliant uses, including several office buildings and the Oakville Entertainment Centrum complex. **These lands are recommended for removal.**

Figure 16
Town of Oakville
Proposed Removals in the Winston Park Area





4.2.4.6 North Oakville Employment Districts

The *North Oakville East Secondary Plan* and *Livable Oakville Plan*, designate a series of Employment Districts and Employment Areas generally clustered around the extended William Halton Parkway, which is partially complete. As these areas are mostly undeveloped, they present a set of opportunities and challenges that are distinct from the established Employment Lands in South Oakville, which have a mix of compliant and non-compliant uses.

Large and contiguous parcels are an essential component of the function of the Town's Employment Lands system. These types of parcels can accommodate intensive industrial uses, both now with existing sectors as well as with future emerging sectors. Large, vacant parcels are a key feature of North Oakville that should be maintained and protected against severances and fragmentation to provide market choice for large-scale industrial development in proximity to major Goods Movement corridors.

Some consideration must be given to supporting a range of employment uses now excluded from the Provincial definition, but which are still vital to the function of Employment Lands. These uses cannot be accommodated in Employment Areas through lawfully established provisions  South Oakville because much of North Oakville's Employment Lands were not zoned for employment prior to October 20, 2024.

In the Northeast Oakville Area (see Figure 17), there is an opportunity to achieve several goals:

- Support Employment-Generating uses that are excluded from the new provincial definition that may not be accommodated in Commercial Areas, such as office uses;
- Support employment growth in commercial and other non-residential sectors that perform essential supportive functions for Employment Areas; and
- Create a buffer between sensitive land uses and industrial uses.

It is proposed that **lands in Employment Districts which lie to the west of Trafalgar Road between the new William Halton Parkway and Burnhamthorpe Road be removed from the Town's Employment Areas and be redesignated for a range of non-residential, Employment-Generating uses.** This action would retain the majority of the Northeast Oakville Area for manufacturing, warehousing, and related uses to the

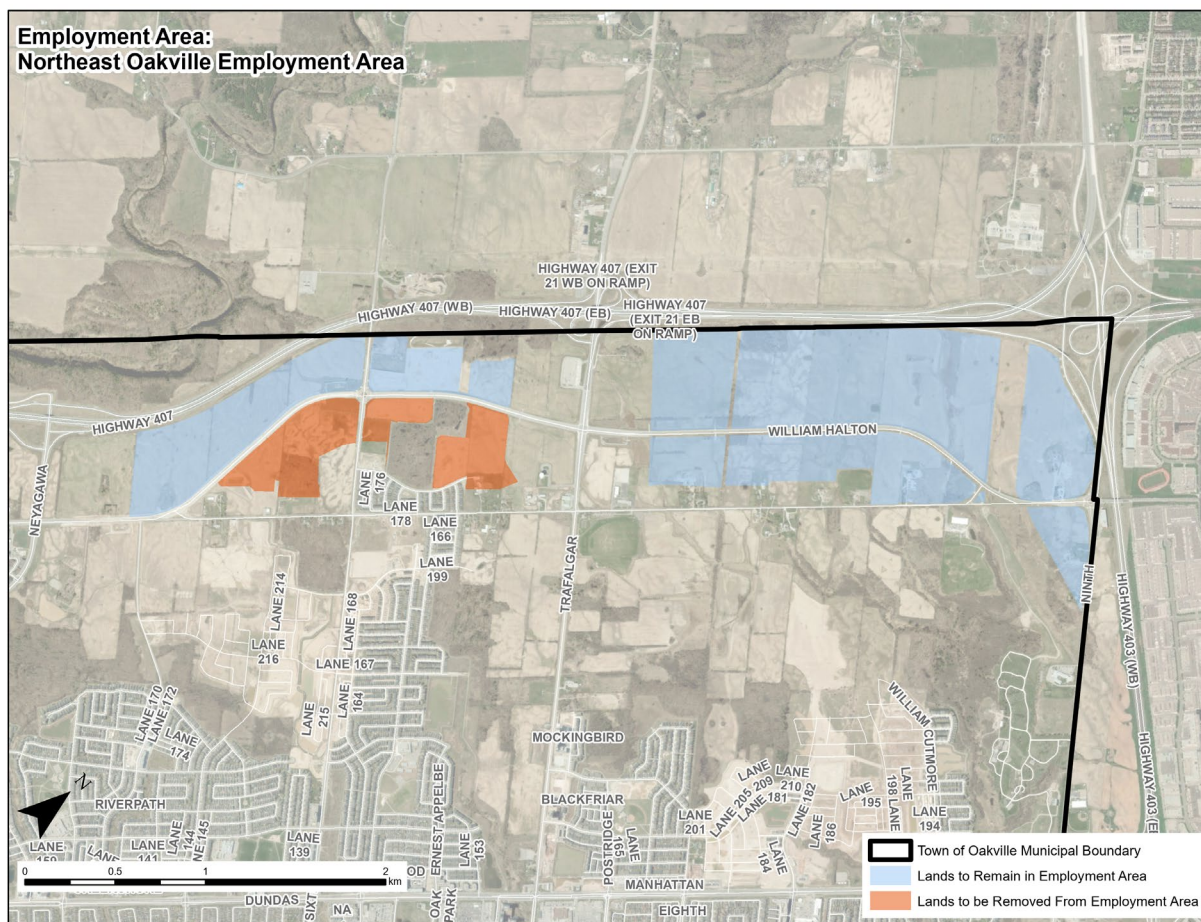


north of William Halton Parkway west of Trafalgar Road and on both sides of William Halton Parkway to the east, while providing a transition to lands fronting Burnhamthorpe Road, which are slated for a mix of uses (including residential). This buffer area would be distinct from the existing Transitional Area designation in the North Oakville East Secondary Plan, which allows for residential uses.

The original intent of the Transitional Area designation was to provide an “interface and buffer” between the Employment District designation and adjacent residential uses through permissions for local-serving commercial, institutional, and community uses that would serve the creation of complete communities. Permissions for residential uses have resulted in substantial residential development abutting the Employment District and a deficit of local-serving commercial uses. The removal of Employment District lands west of Trafalgar, south William Halton Parkway, for non-residential, employment-generating uses could bridge this gap by supporting the needs of local economy while also supporting the Protected Employment Areas in North Oakville.



Figure 17
Town of Oakville
Northeast Oakville Area

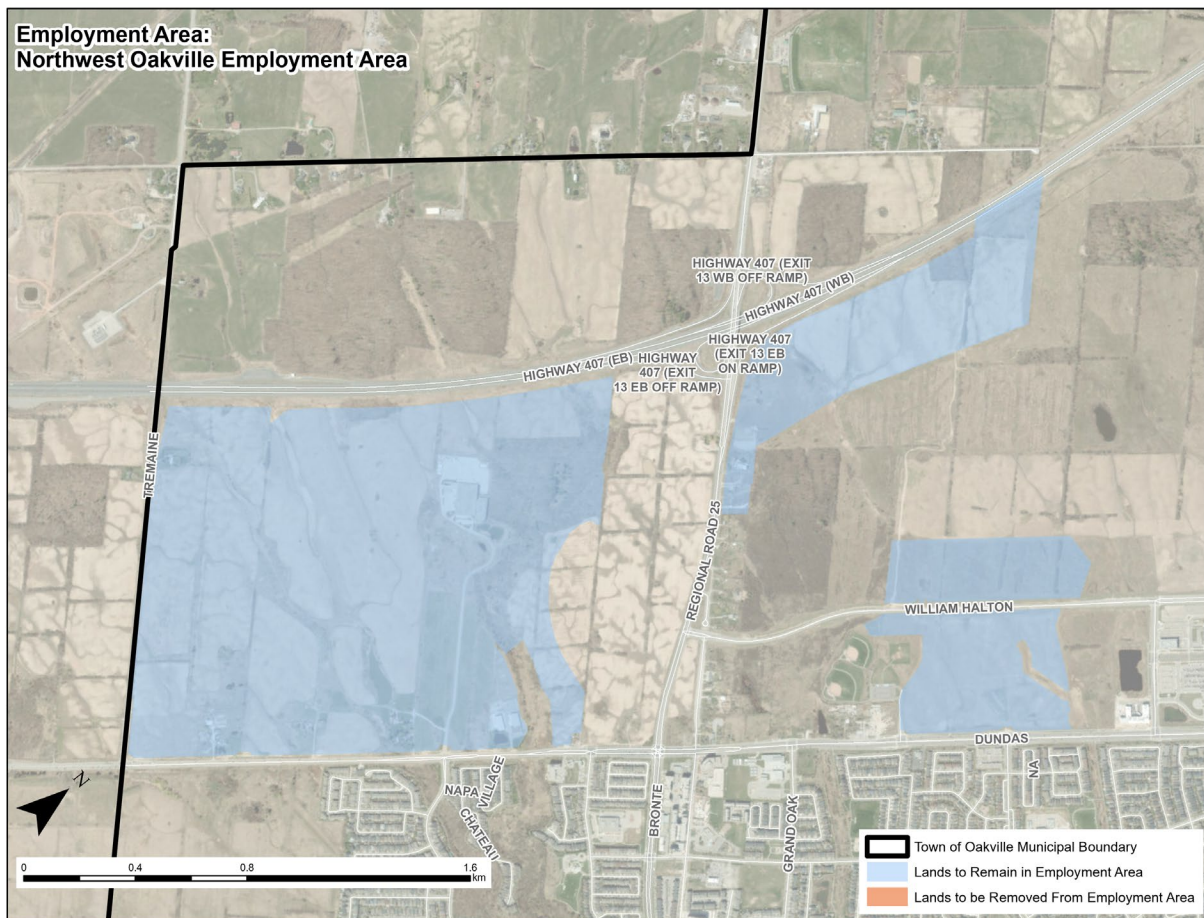


In the Northwest Oakville Area (Figure 18), lands have already been removed through O.P.A. 34, as described in section 2.2 of this report, which will support residential and employment-generating uses by creating opportunities for higher density housing and residential infill within the context of the urban structure.

Lands shown in Figure 18 are generally buffered from any current or future sensitive uses by roadways or natural heritage features, and comprise large parcels that are suitable for industrial developments. For these reasons, **it is recommended to retain all lands.**



Figure 18
Town of Oakville
Northwest Oakville Area





4.3 Underutilized Employment Lands

Employment intensification can take on several forms, including the development of underutilized lots (infill), the expansion (horizontal or vertical) of existing buildings, and the redevelopment of occupied sites. Intensification offers the potential to accommodate future employment growth and achieve improved land utilization, resulting in higher employment density in existing Employment Lands. Higher land utilization on existing Employment Lands can often lead to more effective use of existing infrastructure (e.g., roads, water/sewer servicing) and create a built form that better supports public transit, resulting in communities that are more functional and complete. This review has identified several established areas in Oakville where numerous opportunities exist for employment intensification over the medium to long term.

Through a high-level desktop review using the developed Employment Land parcel inventory, building footprints, and orthophoto overlays, approximately 68 hectares (168 acres) have been identified as underutilized. This reflects parcels that have:

- A vacant portion (potential for severance or building expansion);
- Relatively low building floor space index (less than 20%) or sites that are currently used exclusively for storage and/or parking; and
- Redevelopment sites that are derelict, abandoned, or underutilized built sites.

Underutilized parcels account for 6% of the total developed Employment Land base in the Town. Most of the underutilized lands are located in South Oakville. In contrast, the Town's newer Employment Lands (i.e., North Oakville) have fewer opportunities for intensification as many parcels remain vacant.

Opportunities for infill development and building expansion exist within the Town's existing industrial areas. Intensification of these sites would increase employment densities and generate higher utilization of developed Employment Lands.

Identifying and evaluating opportunities for intensification in response to market demand is a challenging task. The intensification potential of underutilized industrial lands will largely be determined by future development plans of existing or future landowners, which is highly speculative and uncertain. As discussed in section 4.1, between 2015 and 2024, the Town experienced minimal development activity in expansions and additions on Employment Lands, with industrial development accounting for 12% of the



total industrial building activity. Office redevelopment, however, accounted for 2% of Oakville's construction activity.

Infill development and the redevelopment of existing lands are expected to continue to increase over time, largely driven by rising industrial land values and the continued buildout of the Town's Employment Areas. Based on recent intensification trends and longer-term redevelopment opportunities, a 15% intensification target has been assumed for the Town's Employment Areas over the 2025-2051 period.^[16] This assumption is reflected in the employment forecast and land needs analysis presented in section 4.5.

4.4 Employment Land Supply

As previously presented in the *Financial Market Analysis Report*, the Town of Oakville has approximately 518 hectares of vacant Employment Land, 65% of which is in North Oakville. The remaining vacant lands (i.e., 35%) are in South Oakville. Building on the previous section regarding Employment Area removals, this section provides a re-evaluation of the Employment Land supply based on the following land use distinctions:

- **Protected Employment Areas**, as defined by the *Planning Act* and the P.P.S., 2024 and lawfully established uses, which are predominantly intended for industrial uses. As shown in Figure 19 these lands are coloured in purple and shall be retained.
- **Employment-Generating Lands**, which refer to lands that no longer meet the revised definition of Employment Areas under the *Planning Act* but are still intended to contribute to employment growth within the Town of Oakville. These lands support Employment-Generating activities, such as major offices and other employment-supportive uses, that may not typically be located in mixed-use or commercial areas. It should be noted that these lands do not support major retail uses. In the context of South Oakville, as shown in Figure 19 these lands are coloured orange and reflect the lands identified for removal in section 4.2.4.
- **Employment Lands** refer to both the combined total of Protected Employment Areas and Employment-Generating Lands.

^[16] Please note that there is a small variation in our Employment Area intensification demand forecast (13%) and Employment Area intensification target (15%).



Figure 19
Town of Oakville
South Oakville Map of Employment Lands

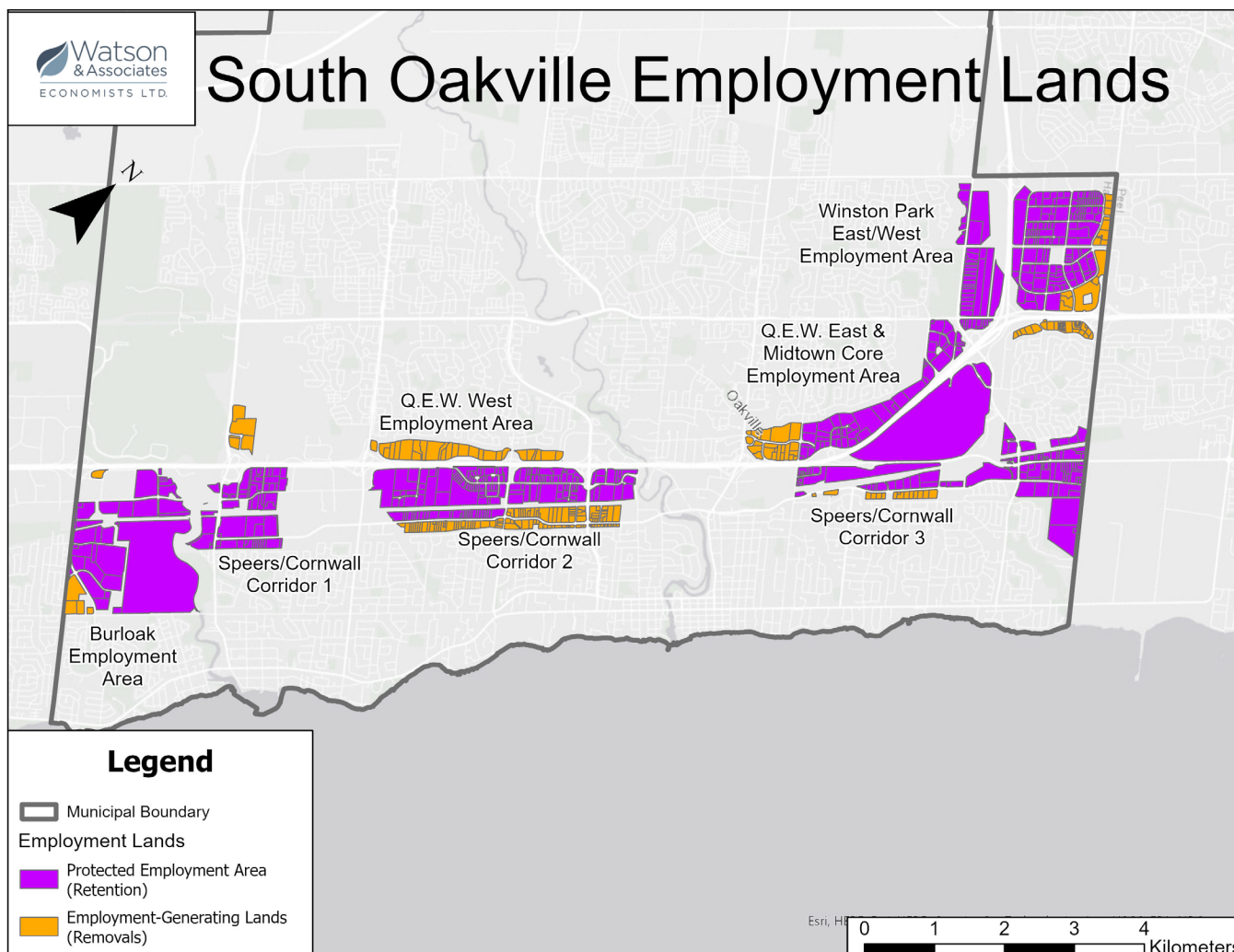




Figure 20 presents the vacant employment land inventory for South Oakville within the broader context of the Town. Within the Employment Lands in South Oakville, a total of 1,377 hectares, including 227 hectares (i.e., 17%) are proposed to be removed and re-designated as Employment-Generating Lands, as shown in Figure 20. The vacant Employment Land supply recommended for removal (i.e., 22 hectares) represents approximately 16% of South Oakville's remaining vacant land supply.

Figure 20
Town of Oakville
South Oakville Employment Land Supply by Status and Type (Gross Hectares)

South Oakville	Protected Employment Areas (Lands Retained) (Hectares)	Employment-Generating Lands (Lands Removed) (Hectares)	Total Employment Lands (Hectares)
Developed	1,030	205	1,236
Vacant	119	22	141
Employment Lands	1,149	227	1,377
%	83%	17%	100%

Note: Figures are reported in hectares and have been rounded and may not add precisely.
Source: Data files provided by the Town of Oakville, prepared by Watson & Associates Economists Ltd.

In North Oakville, it is recommended that a large proportion of the lands remain as designated, given the identified long-term Town-wide need for industrial-type lands and market potential for large-scale Employment Area uses in this area, as shown in Figure 21. As noted in Figure 22, in accordance with forecast demand, it is recommended that approximately 40 hectares of the total 426 hectares (approximately 10%) of vacant Employment Land be allocated for Employment-Generating uses. The remaining 385 hectares are recommended to be retained as a Protected Employment Area for industrial-type uses.



Figure 21
Town of Oakville
North Oakville Map of Employment Land

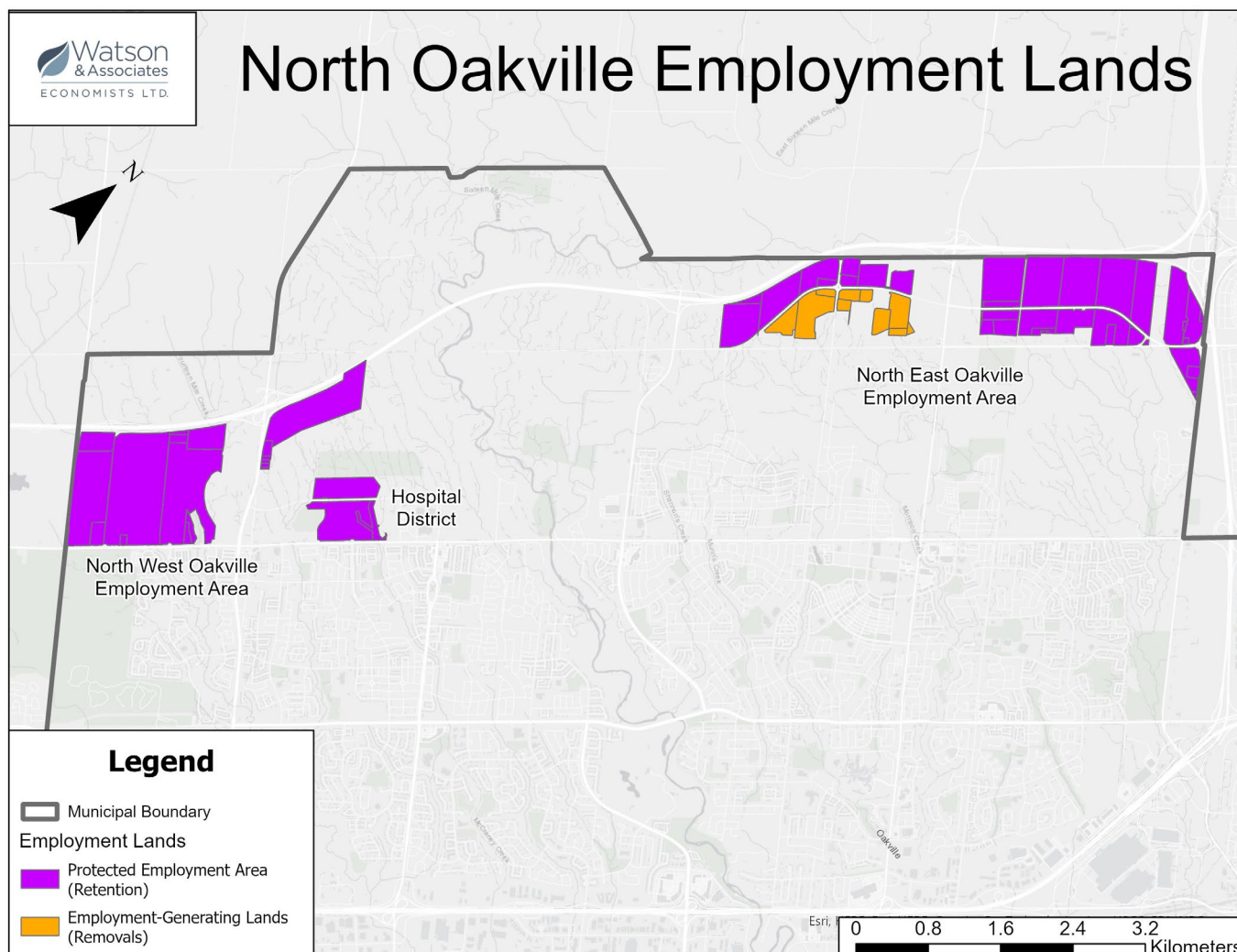




Figure 22
Town of Oakville
Vacant Employment Land Supply by Area and Type (Gross Hectares)

	South Oakville	North Oakville	Town of Oakville
Gross Vacant Employment Land (Protected Employment Area + Employment-Generating Lands)	141	426	567
Vacant Protected Employment Area	119	385	504
Proposed Vacant Lands for Employment-Generating Uses (Employment Areas to be Removed)	22	40	63

Note: Figures are reported in hectares and have been rounded and may not add precisely.
Source: Data files provided by the Town of Oakville prepared by Watson & Associates Economists Ltd.

Figure 23 and Figure 24 illustrate the overall net land area by type for South and North Oakville, respectively, after further adjustments are made for local infrastructure and long-term land vacancy. Long-term land vacancy accounts for lands that may not develop over the planning horizon for various reasons, such as marketability, site constraints, parcel configuration, landowner willingness, etc. These adjustments demonstrate that the amount of available, net developable Employment Area/employment-generating land supply is more limited when factoring in local infrastructure needs and market considerations.

Key observations include:

- In South Oakville, there are approximately 101 net hectares of vacant, developable Employment Lands, of which 83%, (84 net hectares), are recommended for industrial-type uses (i.e. Protected Employment Areas) and the remaining 17%, (18 net hectares), are recommended for other Employment-Generating uses (i.e. lands removed).
- In North Oakville, there are approximately 277 net hectares of vacant developable Employment Lands^[17], of which 250 net hectares are recommended to remain as Protected Employment Area (i.e. lands retained), while the remaining 27 net hectares are recommended for Employment-Generating uses (i.e. lands removed).

^[17] The total vacant Employment Land area excludes lands in O.P.A. 34 as noted in Section 2.2 of this report.



Figure 23
Town of Oakville
South Oakville Vacant Employment Land Supply by Use

	Calculations	Protected Employment Areas (Lands Retained)	Employment Generating Uses (Lands Removed)	South Oakville Total Employment Land
Vacant Employment Lands	(A)	119	22	141
Lands Greater than 4 Hectares	(B)	82	5	87
Lands Less than 4 Hectares	(C)	37	17	54
Adjustment for Internal Infrastructure ^[1]	(D = B x 25%)	20	1	22
Vacant Land Adjusted for Internal Infrastructure	(E = B - D + C)	99	21	119
Long-Term Vacancy Adjustment (15%) ^[2]	(F = E x 15%)	15	3	18
Net Vacant, Developable Employment Land Area	(G = E - F)	84	18	101

^[1] Parcels that are greater than 4 hectares are subject to a downward adjustment of 25% to account for internal infrastructure (i.e., roads, stormwater ponds, easements, etc.).

^[2] A long-term land vacancy adjustment of 15% has been applied to the net vacant land supply.

Note: Figures are reported in hectares and have been rounded and may not add precisely.

Source: Watson & Associates Economists Ltd.



Figure 24
Town of Oakville
North Oakville Vacant Employment Land Supply by Use

	Calculations	Protected Employment Areas (Lands Retained)	Employment Generating Uses (Lands Removed)	North Oakville Total Employment Land
Vacant Lands	(A)	385	40	426
Lands Greater than 4 Hectares	(B)	364	34	398
Lands Less than 4 Hectares	(C)	21	7	28
Adjustment for Internal Infrastructure ^[1]	(D = B x 25%)	91	8	100
Vacant Land Adjusted for Internal Infrastructure	(E = B - D + C)	294	32	326
Long-Term Vacancy Adjustment (15%) ^[2]	(F = E x 15%)	44	5	49
Net Land Area	(G = E - F)	250	27	277

^[1] Parcels that are greater than 4 hectares are subject to a downward adjustment of 25% to account for internal infrastructure (i.e., roads, stormwater ponds, easements, etc.).

^[2] A long-term land vacancy adjustment of 15% was applied to the net vacant land supply to account for lands that may not develop over the planning horizon for various reasons such as marketability, site constraints, parcel configuration, landowner willingness, etc.

Note: Figures are reported in hectares and have been rounded and may not add precisely.

Source: Watson & Associates Economists Ltd.



4.5 Employment Forecast and Land Needs Analysis

4.5.1 Town of Oakville Employment Forecast

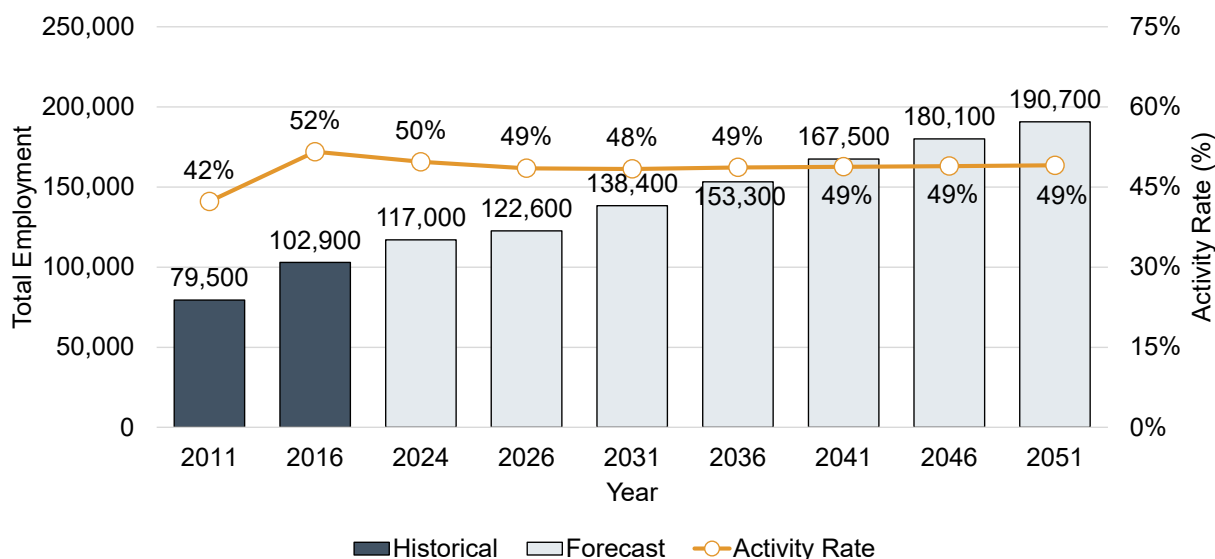
As identified in the *Town of Oakville Growth Analysis Study Report*, the Town is forecast to add approximately 73,700 jobs between 2024 and 2051, representing an annual growth rate of 1.8%.^[18] Figure 25 summarizes the long-term employment forecast for the Town of Oakville. As summarized, the Town is anticipated to reach an employment base of approximately 190,700 jobs by 2051.

Figure 25 also summarizes the employment activity rate in comparison to recent historical trends. The Town's employment activity rate (ratio of jobs to population) increased sharply between 2011 and 2016, but has declined slightly since 2016, indicating that the Town's population is growing at a faster pace than the employment base. Over the long term, the Town's employment activity rate is anticipated to decrease slightly from approximately 50% in 2024 to 49% by 2051. This slight decrease is anticipated to be largely driven by the aging of the population, placing gradual downward pressure on labour force growth (i.e., population aged 15 years and older) over the long term.

^[18] Town of Oakville Growth Analysis Study Report prepared by Watson & Associates Economists Ltd., November 2024.



Figure 25
Town of Oakville
Employment Forecast to 2051



Note: Figures have been rounded. Employment figures include work at home and no fixed place of work.

Source: Town of Oakville Growth Analysis Study, Final Report, November 2024, prepared by Watson & Associates Economists Ltd.

4.5.2 Employment Growth Allocation by Employment Category, 2024 to 2051

Figure 26 provides a summary of the breakdown of the Town's employment growth over the 2024 to 2051 period by employment category, including Employment Lands Employment (E.L.E.), Population-Related Employment (P.R.E.) and Major Office Employment (M.O.E.). P.R.E. uses include commercial and institutional uses that largely serve the local population. Work at home and some No Fixed Place of Work (N.F.P.O.W.)^[19] employment is included in P.R.E. Employment Lands Employment includes industrial-type employment as well as N.F.P.O.W. employment. These uses largely require buffering from sensitive uses, such as residential uses. M.O.E. includes

^[19] Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same work place location at the beginning of each shift. Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc."



employment in office buildings of at least 1,900 sq.m (approximately 20,000 sq.ft.). Provided below is a summary of the growth allocation.

Population-Related Employment

- As summarized in Figure 26, significant employment growth is anticipated within the P.R.E. employment category. P.R.E. growth is anticipated to account for approximately 54% of the Town's total employment growth (approximately 40,000 jobs) between 2024 and 2051. P.R.E. largely serves the local population base by providing convenient locations to residents, and to a lesser extent, the broader regional area.
- It is important to note that work at home employment constitutes a portion of P.R.E., with its growth accelerating significantly during the pandemic due to an increase in remote work arrangements. Over the long-term forecast period, the share of employment associated with work at home arrangements is anticipated to stabilize, consistent with recent trends, suggesting a preference for hybrid work arrangements and a gradual return to the office for many businesses.
- P.R.E. includes local-serving retail and commercial establishments, such as food stores, pharmacies, personal services, and small-scale professional offices (e.g., law and accounting firms), as well as medical and health care services (e.g., dental and medical clinics). Furthermore, institutional uses like schools, public administration offices, and community services are also a key component in serving the local community's needs. As the population base grows, the demand for P.R.E. is expected to rise, driven by the need to serve the institutional and commercial needs for residents. The P.R.E. base also comprises regional-serving establishments, including hotels, shopping centres, big-box retail^[20], and post-secondary institutions (e.g., Sheridan College), which cater to a population extending beyond the Town's boundaries.
- The North Oakville East Commercial Study concluded that while existing commercial uses in South Oakville will continue to meet broader community and regional shopping needs, future retail and service commercial developments in North Oakville East are likely to focus on smaller to mid-sized, local-serving retail units. As a result, the Town's Community Areas are likely to be driven largely by

^[20] Please see Glossary.



local needs and consequently would require less retail space per resident than what is observed in South Oakville.^[21]

Employment Lands Employment

- E.L.E. plays a crucial role in the Town's economic base, focusing primarily on industrial-type employment that often requires a buffer from residential and other sensitive areas. These lands are vital for accommodating some of the Town's largest export-based sectors, including manufacturing, logistics, and warehousing.
- Looking ahead, E.L.E. is projected to contribute significantly to the Town's job growth. E.L.E. is anticipated to represent just under a quarter (24%) of the Town's total employment growth between 2024 and 2051.
- It is important to note that while industrial uses are a key component of E.L.E., they are not exclusively industrial. These uses also incorporate secondary functions, such as those in office and knowledge-based sectors, creating a more diverse employment base. As discussed in the *Financial Market Analysis Study*, integrated industrial and office uses are increasingly becoming a key component of E.L.E. in the G.G.H.^[22]

Major Office Employment

- M.O.E. is anticipated to represent just under a quarter (22%) of the Town's forecast employment growth over the 2024 to 2051 period. As previously discussed, M.O.E. includes employment in office buildings of at least 1,900 sq.m (approximately 20,000 sq.ft.). M.O.E. would include employees who regularly commute to the office, as well as those in hybrid work arrangements. Fully remote employees of Major Office establishments would be classified as work at home employment and are included in the P.R.E. category.
- The M.O.E. employment base is concentrated in South Oakville, where it consists of single- and multi-tenant office buildings. These buildings are predominantly occupied by firms in the professional and scientific services,

^[21] Town of Oakville, North Oakville East Commercial Study prepared by Parcel Inc. and Gladki Planning Associates, November 12, 2024.

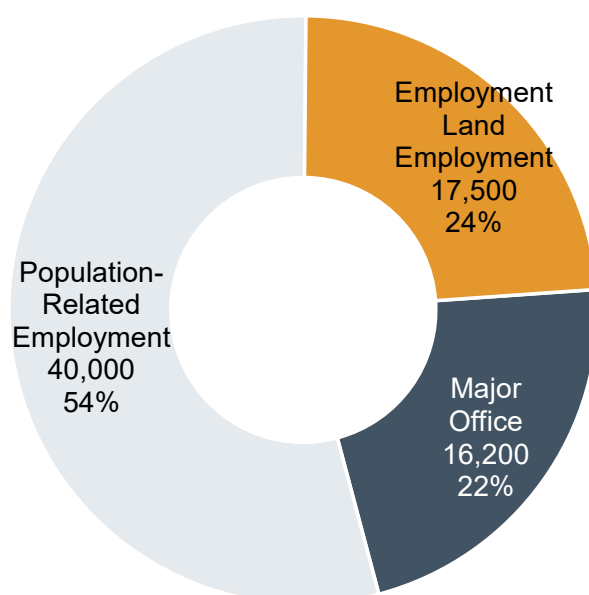
^[22] Refers to section 2.4.3. and 3.1 in the Town of Oakville Employment Areas Review - Financial Market Analysis Study, 2025.



finance and insurance, information technology, real estate, construction, and consulting sectors.

- It is anticipated that the Town will continue to accommodate a range of office built-forms, including flex-office, office in mixed-use buildings, and standalone office buildings. Office uses include a range of tenants, including corporate functions, technology, and financial firms, as well as uses that support the local population base, such as medical and health services, government services, and professional services (e.g., law offices, accounting offices, etc.). As the population in the S.G.A.s becomes denser, there will be a need for higher-density commercial built-forms, such as office buildings.

Figure 26
Town of Oakville
Employment Growth 2024 to 2051 by Major Land Use Category



Note: Figures have been rounded and may not add precisely.
Source: Town of Oakville Growth Analysis Study, Final Report,
November 2024, prepared by Watson & Associates Economists Ltd.

4.5.3 Employment Growth by Geographic Area, 2024 to 2051

Figure 27 provides a summary of the Town's employment growth allocation over the 2024 to 2051 period by development area and by employment category (P.R.E., M.O.E., and E.L.E.). The development areas shown in Figure 27 are identified in



Schedule A-1 of the Town's O.P. and form a key component of the lands within the Town's urban structure that are delineated to accommodate residential and non-residential development. These areas are discussed briefly below, including the share of employment growth anticipated over the 2024 to 2051 period.

- **Strategic Growth Areas:** These are areas identified in the Town's O.P. as Nodes and Corridors and include M.T.S.A.s and other strategic sites that are positioned to accommodate intensification. The S.G.A.s provide opportunities to accommodate high-density employment opportunities, such as mixed-use developments and office developments. As summarized in Figure 26, S.G.A.s are expected to accommodate 39% of Town-wide employment growth to 2051, through M.O.E. and a range of P.R.E. uses in mixed-use buildings, as well as accommodating work at home employment.
- **Residential Areas:** These are areas identified in the Town's O.P.s. consisting of stable residential communities. The Town's O.P.s. encourage commercial uses across the Town, including the Town's Residential Areas; however, P.R.E. and M.O.E. are primarily directed to the S.G.A.s and the Commercial Areas. As summarized in Figure 27, it is anticipated that 14% of Town-wide employment growth associated with P.R.E. will be accommodated in Residential Areas.
- **Employment Areas:** As noted in the *Background Facts Report*, lands designated for employment are called Employment Districts in the *North Oakville East Secondary Plan*, *North Oakville West Secondary Plan*, and *North Oakville Secondary Plan*, and Business Employment, Industrial, or Business Commercial in the *Livable Oakville Plan*. Over the next several decades, these lands are expected to account for approximately 45% of Town-wide employment growth.
- **Commercial Areas:** There are three primary commercial land use designations identified in the *Livable Oakville Plan*: Core Commercial, Community Commercial, and Neighbourhood Commercial. Among these, the lands designated as Core Commercial predominantly comprise the Town's major Commercial Areas. The intent of the Core Commercial designation is to accommodate significant concentrations of commercial uses that serve the broader regional community. These areas are typically situated at key intersections of major arterial roads, benefiting from their proximity to highway infrastructure, and can include a range of retail and commercial uses, as well as offices. Over the forecast period, these lands are expected to accommodate 3% of the Town-wide employment growth.



Figure 27
Town of Oakville
Employment Growth by Development Area and Major Land Use Category,
Based on Existing , 2024 to 2051

Employment Category	Strategic Growth Area	Residential Area	Employment Lands ^[1]	Commercial Areas	Town of Oakville
Employment Land Employment	0	0	17,500	0	17,500
Major Office Employment	6,300	0	9,900	0	16,200
Population-Related Employment	22,700	10,000	5,300	2,000	40,000
Total Employment	29,000	10,000	32,700	2,000	73,700
Share of Town-wide Employment Growth	39%	14%	44%	3%	100%

^[1] Employment Lands includes both jobs accommodated on Employment-Generating Lands and Protected Employment Area.

Note: Figures have been rounded and may not add precisely.

Source: Summarized from the Town of Oakville Growth Analysis Study, Final Report, November 2024, presented by Watson & Associates Economists Ltd.

As previously discussed in section 4.2, the Town's Employment Lands have been reviewed based on their existing functions and employment uses, resulting in two distinct categories. Figure 28 summarizes the Employment Land growth allocation by these two distinct areas that considers the current Town O.P. urban structure (column A) and the recent P.P.S., 2024 policy framework (column B). Protected Employment Areas that meet the P.P.S., 2024 Employment Area definition are primarily industrial and typically buffered from sensitive land uses. As summarized in Figure 28, 54% of the Protected Employment Area employment growth is directed to these lands. In contrast, the remaining Employment-Generating Lands (column C) comprise office spaces, employment-supportive uses, and limited small-scale retail, often on the periphery of Protected Employment Areas and can provide a buffer between Protected Employment Areas and other designations that permit sensitive land uses, as well as other commercial and institutional uses as previously listed in section 2.1. As shown in Figure 28, approximately 15,200 jobs are allocated to the remaining Employment-



Generating Lands, representing 46% of the total E.L.E. These are lands that are not in the Employment Area policies in the P.P.S., 2024; however, they are key in supporting the function of the Town's Protected Employment Areas and accommodating the broad range of employment uses anticipated for Oakville over the next several decades. The total forecast on Employment Lands (including Protected Employment Areas and the remaining Employment-Generating Lands) is summarized below.

Over the forecast, it is expected that approximately 39% of M.O.E. will be accommodated in S.G.A.s, with the remaining 61% of M.O.E. accommodated on the Town's remaining Employment-Generating Lands on Employment Lands. Of this total, South Oakville is forecast to accommodate approximately 47% of M.O.E. jobs, with the remaining 53% of M.O.E. forecast to be accommodated in North Oakville. A target of 20% M.O.E. intensification has been assumed, primarily in South Oakville.

Figure 28
Town of Oakville
Employment Growth on Employment Lands by Major Land Use Category
2024 to 2051

Major Land Use Category	Total Employment Lands	Protected Employment Areas (Lands Retained)	Employment Generating Lands (Lands Removed)
Calculations	$A = B + C$	B	C
Employment Land Employment	17,500	17,500	0
Major Office Employment	9,900	0	9,900
Employment-Supportive/Other Commercial/Institutional Uses	5,300	0	5,300
Total Employment	32,700	17,500	15,200

Note: Figures have been rounded and may not add precisely.

Source: Summarized from the Town of Oakville Growth Analysis Study, Final Report, November 2024, presented by Watson & Associates Economists Ltd.

4.5.4 Existing Average Employment Density by Employment Category

Average employment density refers to the number of jobs located within a given area of land, typically expressed as jobs per hectare. It is essential to understand the existing



employment densities within the Town of Oakville to better assess how land is utilized for employment purposes.

Several industry trends are influencing the average density levels of Employment Lands. Generally, average density levels associated with Employment Lands across the G.T.H.A. have remained steady or declined in the manufacturing sector over the past two decades, as domestic manufacturers have focused on increasing efficiency and competitiveness through automation and capital investment. This trend has been accompanied by an increasing demand for large, land-intensive warehousing and logistics facilities to support the distribution and transportation of goods throughout the expanding urban population base.

The evolving forms of industrial and non-industrial development on Employment Lands are also influencing the average density levels of Employment Lands. As previously noted in the *Financial and Market Analysis Report*, industrial uses accommodated in Oakville's prestige Employment Lands are increasingly integrating industrial, office, and training facilities on-site. These sites also require a significant amount of land to accommodate surface parking and, in some cases, potential for future expansion. On average, employment density levels for integrated office/distribution and training facilities are lower than standalone Major Office developments, but often notably higher when compared to traditional industrial uses. While average employment density levels in Oakville's Employment Lands have increased modestly over the past decade, under a narrower definition of Employment Areas that reflects industrial-type uses, average densities are anticipated to decline gradually over the next several decades.

As previously noted section 4.2 of this report, a large portion of the Town's Employment Lands is occupied by non-industrial employment-supportive uses, multi-tenant, and Major Office uses, and other commercial and institutional uses such as training facilities and public services facilities, which have been identified for removal in accordance with the P.P.S., 2024. Employment densities on these other Employment-Generating Lands tend to vary considerably, but on average, these uses have the potential for much higher densities than traditional industrial-type uses accommodated in Protected Employment Areas.

For Employment-Generating Lands (i.e. lands removed), employment densities are highest when associated with multi-tenant and stand-alone office uses. As discussed in the *Financial and Market Analysis Report*, COVID-19 has accelerated changes in work



and commerce, resulting from technological disruptions that were already underway prior to the pandemic. Businesses are increasingly required to rethink their approach to conducting business, with a greater emphasis on leveraging technology to enhance connectivity with employees and customers. These disruptive forces continue to impact the nature of employment by place of work and sector, and have a direct influence on office space needs by:

- Placing upward pressure on office vacancy rates, including a negative net absorption of office space;
- Supporting higher sustained remote work levels with a continued preference by employees and employers for a hybrid model that offers opportunities for flexible workplace arrangements. This trend also provides the opportunity for employers to reach beyond the commuter shed for talent;
- Changing the office floor plan with a focus on “activity-based” workspaces (e.g., collaboration rooms, hot desking stations, larger kitchens, a variety of desk options, virtual conference rooms, rest areas, etc.);
- Focusing on flexible office-hour arrangements with less emphasis on the “9 to 5” office environment; and
- Generating a “flight to quality” for office space where businesses are seeking higher-quality offices with amenities on-site and nearby to attract talent and to bring employees into the office.

The above-noted trends are anticipated to result in increasingly lower average office floor space requirements per worker, thereby increasing the average employment density associated with new office development and reducing office space needs per capita in the long term. Such trends, however, are not anticipated to eliminate the need for new office construction over the long term.

Figure 29 summarizes the average employment densities by land use employment for the Town of Oakville’s Employment Lands, including Protected Employment Areas, as defined under the P.P.S., 2024, and Employment-Generating Lands that have been identified for removal, as previously summarized herein in section 4.2. Key observations include:



- The 2016 Employment and Commercial Review examined Employment Land densities, which at the time averaged approximately 28 jobs per hectare.^[23] Since the completion of that study, employment densities have increased to an average of 40 jobs per hectare, as illustrated in Figure 29.
- An increase in average Employment Land density has been achieved over the past decade, primarily through optimization of developed lands through intensification and the development of higher-density employment built-forms such as multi-tenant industrial plazas and advanced manufacturing facilities on vacant lands. In contrast to recent development trends in northern Halton Region and Peel Region, recent development activity in the Town of Oakville has focused less on large, land-intensive, low-density logistics and warehousing operations. Looking forward, a portion of the Town's vacant Protected Employment Areas in North Oakville is anticipated to accommodate demand associated with the logistics sector, which may place some downward pressure on average employment densities.
- The development of new office space on Employment Lands, as outlined in subsection 4.1.3, has been a key driver of increased employment densities in recent years, as these office developments support higher densities.
- The *Financial and Market Analysis* (Figure 3-5) highlights that recent industrial development has consisted of single- and multi-tenant buildings, which tend to be less land-intensive, further contributing to the upward trend in employment densities.
- M.O.E. uses are predominantly located along the Q.E.W. corridor, with an average density of 118 jobs per net hectare and include a range of office-built forms, including one-storey flex-office buildings, offices in mixed-use buildings (retail and office uses), low-rise and mid-rise office buildings (up to 12 storeys), and to a lesser extent high-rise office buildings (more than 12 storeys). This diverse range of office building types helps accommodate a wide array of businesses and their unique space requirements.

^[23] Employment density reflects not only industrial-type uses but also include Major Office and other Employment Supportive Uses in Employment Areas. Town of Oakville Employment and Commercial Review, Appendix B: Employment Report, prepared by Dillon Consulting Limited, in collaboration with Watson & Associates Economists Ltd., Tate Economic Research Inc., and SGL Planning & Design Inc., October 2016.



Figure 29
Town of Oakville
Existing Average Employment Density by Major Land Use on Employment Lands

Land Use Category	Employment Density (jobs per net hectare)
Protected Employment Areas (P.P.S., 2024)	46
Employment-Generating Lands Outside of Employment Areas (P.P.S., 2024):	-
Major Office Employment	118
Employment-Supportive Uses and Other Commercial/Institutional Employment	30
Total Employment Lands	40

Note: Figures have been rounded.

Source: Derived from 2023 Halton Region Employment Survey and parcel fabric data provided by the Town of Oakville, summarized by Watson & Associates Economists Ltd.

4.5.5 Forecast Employment Land Density

As previously noted, the evolving forms of industrial and non-industrial development on Employment Lands are also influencing the average density levels of Employment Lands. As of 2023, designated Employment Areas in the Town of Oakville accommodated approximately 18,600 jobs on 400 net hectares of developed land, yielding an average employment density of 46 jobs per net hectare (19 jobs per net acre), as shown in Figure 30. By 2051, the Town's employment base is anticipated to increase to 36,070 jobs across 867 net hectares of designated Protected Employment Areas. As a result, the average employment density is projected to fall to 42 jobs per net hectare (17 jobs per net acre).



Figure 30
Town of Oakville
Employment Area Density, 2023 and 2051

-	Calculations	2023	2023 to 2051	2051
Total Jobs	A	18,600	17,470	36,070
Total Land Area (hectares)	B	400	467	867
Employment Density (jobs per hectare)	$C = A / B$	46	37	42

Note: Figures may not add precisely due to rounding. The 2023 land area is based on developed land as shown in the Town of Oakville Financial Market Analysis Report.
Source: Watson & Associates Economists Ltd.

Due to a small sample size, the employment on Employment-Generating Lands in the Town of Oakville is not shown. As shown in Figure 31, over the forecast period, employment densities on Employment-Generating Lands are expected to increase, averaging approximately 148 jobs per net hectare, which is expected to be higher than existing levels. This is driven by an increased focus on multi-tenant commercial buildings, as well as a range of office uses. The shift to hybrid work arrangements, as noted, has reduced the amount of floor space needed per worker due to shared office arrangements and fewer storage requirements. As a result, office developments are now characterized by greater density, allowing more employees to fit into less building space.

Over the forecast period, average employment densities on Employment-Generating Lands are expected to increase, primarily driven by rising density trends in M.O.E., as discussed above. Figure 32 illustrates an example of a Major Office building in South Oakville. The building occupies a site of approximately 0.38 hectares and accommodates over 100 employees, resulting in an employment density of about 286 jobs per hectare. Figure 33 highlights another example of an employment-supportive use in South Oakville. This site is approximately 3 hectares in size with an overall density of roughly 75 jobs per hectare.



Figure 31
Town of Oakville
Employment-Generating Lands^[1] on Employment Lands
Average Density between 2023 and 2051

-	Calculations	2023 to 2051
Total Jobs	A	15,170
Total Land Area (hectares)	B	103
Employment Density (jobs per hectare)	$C = A / B$	148

^[1] Please refer to Figure 19 and Figure 20, Employment-Generating Lands refer to employment that supports commercial/institutional uses (excluding major retail), which have been removed from former Employment Areas under the direction of the P.P.S., 2024.

Note: Figures may not add precisely due to rounding. The 2023 land area is based on developed land as shown in the *Town of Oakville Financial Market Analysis Report*.

Source: Watson & Associates Economists Ltd.

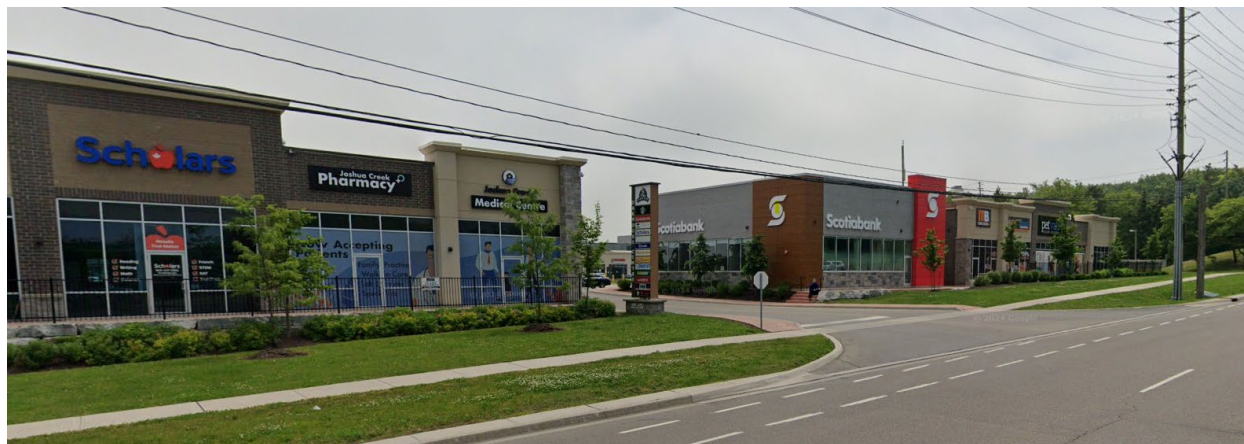
Figure 32
Town of Oakville
Example of Major Office Buildings



Source: Google Earth Imagery of Major Office building along Speers Road.



Figure 33
Town of Oakville
Example of Employment Supportive Uses



Source: Google Earth Imagery of Employment- Supportive uses along Upper Middle Road East.

When combined, Protected Employment Areas and Employment-Generating Lands are expected to accommodate approximately 78,140 jobs across 1,669 net hectares (4,124 net acres) by 2051, as shown in Figure 34. This equates to an overall employment density of 47 jobs per hectare (19 jobs per acre).

Figure 34
Town of Oakville
Total Density on Employment Lands (Employment Areas and Employment-Generating Lands), 2023 and 2051

-	Calculations	2023	2023 to 2051	2051
Total Jobs	A	45,500	32,640	78,140
Total Land Area (hectares)	B	1,100	569	1,669
Employment Density (jobs per hectare)	$C = A / B$	40	57	47

Note: Figures may not add precisely due to rounding.
Source: Watson & Associates Economists Ltd.



4.5.6 Employment Land Need

Figure 35 and Figure 36 present the Employment Land need for South Oakville and North Oakville, respectively.^[24] Key observations include:

- Building on previous relevant studies recently completed for Town, including the *Financial and Market Analysis Report* prepared as part of this review, it is recognized that the Town's forecast represents an ambitious, but appropriate, long-term growth outlook for the Town's Employment Lands.
- To accommodate approximately 32,000 additional jobs on the Town's Employment Lands, the Town is anticipated to exhaust its remaining supply of vacant Protected Employment Areas and remaining Employment-Generating Lands within its Employment Lands throughout both South and North Oakville prior to 2051.
- Accordingly, the results of this analysis indicate that the Town will require all its Employment Lands to remain designated for employment uses. It is recommended that the Town regularly monitor its remaining supply of vacant Protected Employment Areas and remaining Employment-Generating Lands to ensure that sufficient land is available to accommodate a broad range of industrial, office, and employment-supportive uses in these areas to the year 2051 and beyond.
- As previously noted, this review assumes that approximately 15% of forecast employment growth in the Town's Employment Areas will be accommodated through intensification. While it is difficult to predict employment intensification, it is assumed that a modest potential for employment intensification exists across the Town's Employment Lands, particularly within established lands in South Oakville. As part of this review, a total of just under 70 hectares have been identified within the Town's Employment Lands, which could accommodate varying levels of employment intensification. Over the long term, employment intensification opportunities are assumed to be greatest within the Town's Employment-Generating Lands.

^[24] The long-term employment forecast for the Town was prepared as part of the Town of Oakville Phase 1 Growth Analysis Study. November 2024. Watson & Associates Economists Ltd. Appendix G.



Figure 35
Town of Oakville
South Oakville Land Needs, 2025 to 2051

-	Calculations	Employment Areas	Employment-Generating Lands	Total Employment Lands
Employment Growth Between 2025 and 2051	(A)	8,800	6,600	15,400
Less Intensification Opportunities ^[1]	(B)	600	2,500	3,100
Jobs Less Intensification	(C = A - B)	8,200	4,100	12,300
Forecast Density (jobs per net hectare)	(D)	35	137	47
Land Demand (net hectares)	(E = C / D)	233	30	263
Land Supply (net hectares)	(F)	84	18	101
Land Need (net hectares)	(G = F - E)	-149	-12	-162

^[1] Over the forecast, 7% of the jobs in Employment Areas can be accommodated through intensification and approximately 38% of the Employment-Generating Lands can be accommodated through intensification.

Note: Figures have been rounded.

Source: Watson & Associates Economists Ltd.



Figure 36
Town of Oakville
North Oakville Land Needs, 2025 to 2051

-	Calculations	Employment Areas	Employment-Generating Lands	Total Employment Lands
Employment Growth Between 2025 and 2051	(A)	8,100	7,800	15,900
Less Intensification Opportunities ^[1]	(B)	400	600	1,000
Jobs Less Intensification	(C = A - B)	7,700	7,200	14,900
Forecast Density (jobs per net hectare)	(D)	33	99	49
Land Demand (net hectares)	(E = C / D)	234	73	307
Land Supply (net hectares)	(F)	250	27	277
Land Need (net hectares)	(G = F - E)	16	-46	-30

^[1] Due to limited existing development, over the forecast, approximately 5% of the jobs in Employment Areas can be accommodated through intensification, and approximately 7% of the Employment-Generating Lands can be accommodated through intensification.

Note: Figures have been rounded.

Source: Watson & Associates Economists Ltd.

Figure 37 summarizes Oakville's long-term Employment Land needs at the Town-wide level. By 2051, the Town is projected to face a shortfall of approximately 133 net hectares within Protected Employment Areas, along with an additional deficit of 58 net hectares for Employment-Generating Lands, resulting in a total combined shortfall of 191 hectares. Accordingly, it is recommended that the Town protect its remaining Employment Lands (i.e. both Protected Employment Areas and Employment-Generating Lands) and actively encourage greater intensification where appropriate.

As previously noted in the *Financial and Market Analysis Report*, a 15% long-term land vacancy adjustment (67 hectares) has been assumed on the Town's remaining vacant lands. This adjustment was applied to the net vacant land supply to account for properties that may not be developed within the planning horizon due to various factors like marketability, site constraints, parcel configuration, or landowner willingness.



Over the long term, the Town may be able to reduce the likelihood of these lands remaining undeveloped. This could be achieved through active engagement with landowners, addressing their concerns and exploring solutions to overcome development barriers.

It is recognized that the long-term employment lands shortfall identified herein may vary, subject to demand on employment lands (within Protected Employment Areas and Employment-Generating Lands), average employment density levels associated with new construction, and the level of employment intensification achieved over time. Accordingly, it is recommended that the Town regularly monitor its Employment Land supply, building on the input and direction from this review.

Figure 37
Town of Oakville
Oakville Land Needs, 2025 to 2051

-	Calculations	Protected Employment Areas	Employment-Generating Lands	Total Employment Lands
Employment Growth Between 2025 and 2051	(A)	16,900	14,400	31,300
Less Intensification Opportunities ^[1]	(B)	1,000	3,100	4,100
Jobs Less Intensification	(C = A - B)	15,900	11,300	27,200
Forecast Density (jobs per net hectare)	(D)	34	110	48
Land Demand (net hectares)	(E = C / D)	467	103	570
Land Supply (net hectares)	(F)	334	45	379
Land Need (net hectares)	(G = F - E)	-133	-58	-191

^[1] Approximately 13% of the total employment can be accommodated through intensification.
Note: Figures have been rounded.
Source: Watson & Associates Economists Ltd.



4.6 Observations

This Chapter provides a comprehensive assessment of the Town of Oakville's Employment Lands, focusing on recent development activity, the evaluation of land for retention or removal, and the Town's long-term Employment Land needs.

Consistent with the P.P.S., 2024, this section has evaluated all Employment Lands in Oakville to identify lands that should remain protected (i.e. Protected Employment Areas) versus those suitable for removal (i.e. Employment-Generating Lands). The analysis applied a core principle of maintaining contiguity, protecting areas with access to Goods Movement infrastructure, and preserving locations that continue to support manufacturing, warehousing and other industrial uses. In some instances, lands dominated by non-industrial uses, such as retail, institutional, or commercial uses, were identified as candidates for removal from the Employment Area delineation.

The Town of Oakville maintains a robust supply of Employment Lands, estimated at approximately 379 hectares of net vacant land, with most of these lands identified as Protected Employment Areas (334 hectares). Over the long-term planning horizon, the Town of Oakville is expected to accommodate 31,300 jobs on Employment Lands between 2025 to 2051, with an overall shortfall of 191 hectares. The Town of Oakville should protect its remaining Employment Lands (i.e. both Protected Employment Areas and Employment-Generating Lands) and continue to monitor these lands to ensure that the Town builds balanced and complete communities that promote economic competitiveness.

While this study focuses on non-residential growth within the Town, Oakville has or is currently undertaking several complementary studies examining residential growth. The *Housing Needs Assessment* provides a comprehensive analysis of Oakville's demographic trends, housing supply and projected affordable housing needs to 2036,^[25] while the *Phase 1 Growth Analysis Study* highlights the Town's long-term population, housing and employment demand to 2051.^[26] Both studies note that the Town's existing housing supply is predominantly composed of grade-related (i.e. single-detached, semi and row townhouses) housing. However, as the Town continues to grow and mature,

^[25] Town of Oakville Housing Needs Assessment, Final Report, August 2025 prepared by SHS.

^[26] Town of Oakville Growth Analysis Study, Final Report, November 2024 prepared by Watson & Associates Economists Ltd.



the availability of land for this type of housing is diminishing, and a larger share of future residential development is expected to be in higher-density forms. Building on the *Phase 1 Growth Analysis Study*, a forthcoming *Phase 2 Growth Analysis Study* will provide further direction on how anticipated population growth and future housing demand is planned to be accommodated within the Town's Strategic Growth Areas (S.G.A.s.) over the long-term. Lastly in 2024 the Town has prepared a Commercial Study for North Oakville East.^[27]

It is recognized that the Town of Oakville has a finite supply of greenfield land available to accommodate both residential and non-residential growth, and this supply should be regularly monitored. This study provides direction on how future employment growth can be supported and accommodated within the Town's Employment Lands, while the Town's *Housing Needs Assessment*, *Growth Analysis Studies*, and relevant commercial studies will provide guidance on the accommodation of future housing and commercial demand to the year 2051 and beyond.

^[27] North Oakville East Commercial Study, November 12, 2024, prepared by Gladki Planning Associates for the Town of Oakville.



5. Policy Recommendations and Options

Implementation of the new provincial framework for Employment Areas and removals considered in section 4.2 of this report will require amendments to the policies and schedules of the *Livable Oakville Plan* and the *North Oakville East Secondary Plan*. Please note that due to its interim nature as an O.P. of the Town, the Halton Region Official Plan has not been considered in this analysis.

The following are policy recommendations and options for implementation. Recommendations are related to conformity with provincial changes, while options are additional considerations that support the recommendations.

5.1 Urban Structure

The removal of lands from the Town's Employment Areas has implications for both the Town's structure (Schedule A1) and land use designations (Schedules E-S1).

Direction is required in the Town's O.P.s for the role that the removed lands will play in supporting growth in the Town. Employment Areas as defined by the Province in the *Planning Act* and P.P.S., 2024, are delineated through the Town's urban structure. This **delineation** of Employment Areas on Schedule A1 is not a **designation**. Permitted uses or development policies on those lands are defined through the land use designations shown on Schedules E through K and S1.

As established in section 4.5 of this report, even with the removals proposed through this study, there will be a deficit of land for employment-supportive uses. The Town's growth policies should clearly state that Employment-Generating Lands removed from the Town's Employment Areas still contribute to the Town's overall economic and job growth, and should continue to serve the needs of business and commerce. Comprehensive redesignation of removed Employment-Generating Lands to permit residential uses would significantly impair this function. Thus, the Town's urban structure should reflect that both Protected Employment Areas and removed Employment-Generating Lands from the Town's Employment Lands.



Recommendation 1: Amend Schedule A1 of the *Livable Oakville Plan* to change the name of “Employment Areas” to “Employment Lands”.

Option 1A: Consider applying a hatched overlay to the Employment Lands component to identify lands removed.

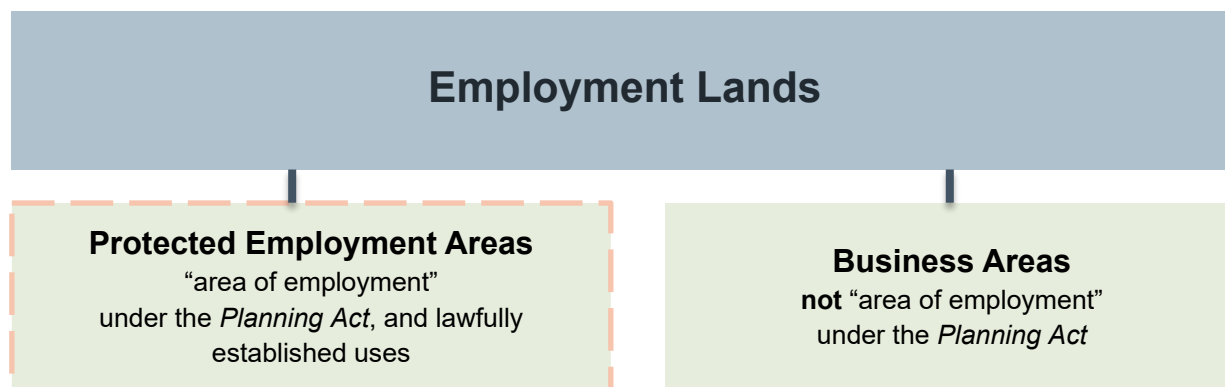
Recommendation 2: Change all references of “Employment Area” in the *Livable Oakville Plan* to “Employment Lands”.

Recommendation 3: Amend section 3.8 of the *Livable Oakville Plan* to be titled “Employment Lands” and set the following direction:

- Employment Lands provide for a mix of uses, including industrial, manufacturing, warehousing, and certain commercial uses, including office and retail uses.
- Employment Lands are not intended to support residential uses or major retail uses.
- Employment Lands are generally located along or nearby Provincial highways, including the QEW, the 403 and the 407, as well as rail corridors.
- Employment Lands comprise two land use designations, (see Figure 39):
 - Protected Employment Areas, which are considered “areas of employment”, and lawfully established uses as defined in section 1(1.1) and (1.2) of the *Planning Act*, and which are for clusters of manufacturing, warehousing, and associated and ancillary uses.
 - Business Areas, which are clusters of a broader range of employment-generating uses than Protected Employment Areas, including retail, office, and service commercial, but which are still safeguarded through policy for commerce and not intended for residential uses.
- Maintain existing direction for the Employment Mixed-Use Corridor on Speers Road, but change the last sentence to read “An Employment Mixed Use Corridor is a **Business Area in the Town’s Employment Lands** ~~an Employment Area~~ in which a broader range of employment uses may be permitted in order to support the function of the **Business Area Employment Area** ~~Area~~ as a strategic growth area.”



Figure 38
Illustration showing how the Town's Employment Lands are broken into Protected Employment Area and Business Area (Land Use Designations)



5.2 Land Use Designations and Special Policy Areas

With the urban structure modified to identify all former Employment Areas as Employment Lands, the land use schedules designations will need to be updated to reflect the new definition of Employment Areas as defined by the Province.

As this study was prompted by changes to the possible permitted uses in Employment Areas, the Town's O.P.s will have to be amended to conform to those permissions. Additionally, consideration needs to be given to the intended function of the removed lands and how the land use designation(s) applied there will support that function.

Recommendation 4: Redesignate all lands identified for retention as Employment Areas to a new designation on Schedules E to S1 of the *Livable Oakville Plan* called **Protected Employment Area**. Amend section 14.5 of the *Livable Oakville Plan* as follows:

- Refer to sections 4.2.1 through 4.2.4.6 and all lands highlighted in blue to be redesignated as Protected Employment Area.
- Retain the list of permitted uses in subsection 14.5.1 (a).
- Remove all office and motor vehicle-related policies in subsections 14.5.1 (b) through (d).
- Add a policy permitting all uses which were lawfully established before October 20, 2024, to continue.



Recommendation 5: Amend section 7.6.8 of the *Livable Oakville Plan* to rename the Employment District designation as **Protected Employment Area** and remove all permissions for uses not permitted in Employment Areas as defined by the *Planning Act* and P.P.S., 2024.

Recommendation 6: In both section 14.5 of the *Livable Oakville Plan* and section 7.6.8 of the *North Oakville East Secondary Plan*, add a new policy stating that Protected Employment Areas meet the definition of “area of employment” under section 1(1) of the *Planning Act*.

Recommendation 7: Redesignate all removed lands from the Employment Areas as **Business Area** on Schedules E to S1 of the *Livable Oakville Plan*.

Recommendation 8: Redesignate all removed lands from the Employment Areas/Districts as **Business Area** in all Secondary Plan mapping.

Recommendation 9: In Part D of the *Livable Oakville Plan* delete the Office Employment, Business Employment, and Business Commercial designations and consolidate their policies into new policies for the Business Area designation.

The following as-of-right permitted uses are recommended for the new Business Area designation:

- Office uses, including Major Office uses;
- Indoor sports facilities;
- Training facilities and commercial schools;
- Service commercial uses, including restaurants, financial institutions and drive-through facilities;
- Motor vehicle uses, including car dealerships;
- Public uses (utilities, emergency services, Town buildings, etc.); and
- Accessory uses and legally existing uses (including existing major office uses).



The following conditional permitted uses are recommended for the new Business Area designation:

- Light industrial uses such as manufacturing, assembling, processing, fabricating, repairing, warehousing and wholesaling, if it is demonstrated that the use will be compatible with nearby sensitive uses;
- Retail uses, but not major retail uses; and
- Hotels and public halls along arterial roads.

Recommendation 10: In section 7.6 of the North Oakville East Secondary Plan, add policies for the new Business Area designation which implement the permitted uses listed above.

Recommendation 11: Maintain existing policy 14.1.8 directing major office development to Midtown Oakville, M.T.S.A.s, and other S.G.A.s, where feasible. This is consistent with the new provincial direction in subsection 2.8.1.4 of the P.P.S., 2024.

Recommendation 12: Remove policies regarding non-compliant uses in Protected Employment Areas, including policies 14.1.6 (major retail outside of M.T.S.A.s) and 14.1.10 (drive-through facilities).



Recommendation 13: Amend section 28.4 (Speers Road Corridor) of the *Livable Oakville Plan* as follows:

- Replace all instances of “Employment Area” in section 28.4 with “Business Area”.
- Amend section 28.4.5 (Land Use Policies) to reflect the consolidation of former Employment Area designations, and permit all uses listed under policies 28.4.5c), d), and e), where not already permitted under the new Business Area designation.
- Continue to prohibit major retail uses in the Corridor but remove specific floor area maximums and defer to zoning for this direction.
- Add a new policy stating that lands designated Protected Employment Area are subject to the permitted uses and development criteria of that designation, but that the objectives of Section 28.4 as a whole should be supported, where feasible, by new industrial development.

5.3 Minimize Redesignation of Employment Lands

With the reduction of the Town’s existing Employment Areas, it is important to protect those lands remaining in Protected Employment Areas from conversion to uses that threaten the area’s contiguity and viability. Until the removal of Halton Region’s planning responsibilities in July 2024, and the enactment of the new P.P.S. in October 2024, conversions of Employment Area could only be considered through an M.C.R. of the Region’s O.P. An M.C.R. would typically consider requests for conversions from landowners and consider them holistically against land needs analysis.

Under the new framework, the Town will be solely responsible for approving conversions, and the requirement for those conversions to occur through an M.C.R. has been removed from the P.P.S., 2024. This means that the Town would receive conversion requests directly through an O.P.A. application, and would need a clear and robust policy framework to ensure that Protected Employment Areas are not further reduced.



Recommendation 15: Amend section 14.2 of the *Livable Oakville Plan* to be consistent with the P.P.S., 2024, by deleting policy 14.2.3, which directs conversions to the Regional M.C.R.

Recommendation 16: Amend section 14.2 of the *Livable Oakville Plan* and section 7.6.8 of the *North Oakville East Secondary Plan* to add provincial assessment criteria for requests to redesignate lands in Protected Employment Areas:

- Identification of the need for the removal of the land(s) and that the land(s) are not needed for Employment Area uses over the long term;
- That the proposed uses on the lands to be removed would not negatively impact the overall viability of the Employment Area by:
 - Avoiding, or where avoidance is not possible, minimizing and mitigating potential impacts to existing or planned Employment Area uses; and
 - Maintaining access to major Goods Movement facilities and corridors.
- That existing or planned infrastructure and public service facilities are available to accommodate the proposed uses on the lands to be removed; and
- That the Town has sufficient land to accommodate projected employment growth to the horizon of the Town's O.P.s.

Option 16A: In addition to the provincial criteria listed above, the Town may consider including additional criteria in section 14.2 of the *Livable Oakville Plan* and section 7.6.8 of the *North Oakville East Secondary Plan* to ensure continuity and a holistic approach for requests to redesignate lands in Protected Employment Areas:

- That the lands are located on the fringe of an assembly of Protected Employment Area and will not result in the fracturing of the contiguity of the Protected Employment Area. These lands offer limited market supply potential for Protected Employment Area development due to size, configuration, access, physical conditions, and/or servicing constraints;
- That the proposed new land uses will not adversely impact the transportation network and movement of goods in the Protected Employment Area; and
- That the request for removal demonstrates that the total job yield of the lands can be maintained or improved.



As established in Section 4.5.6, even with the proposed removals, the Town will face an overall deficit of Employment Lands to support job growth, particularly in employment-supportive functions. Therefore, it is important to establish a framework to minimize loss of Business Area lands to uses that support lower levels of employment.

Recommendation 17: Add a policy applying to the new Business Area designation in both the *Livable Oakville Plan* and the *Northeast Oakville Secondary Plan* that applies the following tests for proposed O.P.A.s redesignating lands in that designation for a different use than permitted:

- That the lands offer limited market supply potential for a permitted use in the Business Area designation;
- That there is a demonstrated need for the proposed use;
- That the lands are not directly adjacent to lands in an Employment Area;
- That the proposed development demonstrates that the total job yield of the lands can be maintained or improved; and
- That the proposed new land uses will not adversely impact the transportation network and movement of goods in an adjacent or nearby Employment Area.

Recommendation 18: Ensure that the burden of proving the criteria does not fall on the Town by requiring that requests for Protected Employment Area or Business Area redesignations occur through an O.P.A. application that is supported by a peer-reviewed additional study, with fees paid by the proponent.

5.4 Ensure Land Use Compatibility

The removal of Employment Area (now designated as Business Areas) means the removal of conversion criteria for those lands, which introduces a much higher likelihood of sensitive land uses being proposed nearby or adjacent to industrial uses in Employment Areas. To minimize potential land use compatibility issues, the Town can follow the provincial policy framework for compatibility by implementing the following recommendations in both the L.O.P. and the *North Oakville Secondary Plans*.



Recommendation 19: Implement policy 2.8.1.3 of the P.P.S., 2024 by adding a policy to section 14.2 of the *Livable Oakville Plan* and section 7.6.8 of the *North Oakville East Secondary Plan* which requires that on lands within 300 metres of a developed or planned Protected Employment Area, development must avoid, or minimize/mitigate if avoidance is not possible, impacts on the long-term economic viability of uses within the area. This policy can help minimize compatibility issues arising from sensitive uses proposed in lands removed from Employment Areas (now designated Business Areas).

Recommendation 20: Add a new use-specific compatibility policy to implement section 3.5 of the P.P.S., 2024, which requires a sensitive land use (regardless of the location) will only be permitted if any potential adverse impacts from major facilities or other industrial uses are avoided, or minimized/mitigated. This policy will help minimize compatibility issues for existing major facilities or other industrial uses that are located on lands removed from an Employment Area.

5.5 Planning for Office and Mixed-Use Development in Strategic Growth Areas and Major Transit Station Areas

Workers in knowledge-intensive industries are increasingly demanding accessible and dynamic work environments that promote interaction and innovation. This underscores placemaking as an increasingly recognized and important concept in creating diverse and vibrant workplaces which, in turn, can help attract local population and job growth provided that other necessary infrastructure requirements are met. This is particularly relevant in mixed-use environments which integrate retail, office, commercial, residential, and other community uses with public open spaces.

Given the strong employment growth identified for the Town of Oakville and the Region of Halton that is increasingly oriented towards knowledge-based sectors, S.G.A.s/ M.T.S.A.s offer strong market attributes to accommodate these growing employment sectors. Considering the near and longer-term market outlook for office and mixed-use development opportunities identified within the Town's S.G.A.s/M.T.S.A.s, the Town of Oakville should continue to prioritize its efforts to encourage and promote office and



mixed-use development where market demand potential is highest. The Town should also work to identify potential gaps between planning policy objectives and market demand across each of the Town's S.G.A.s/M.T.S.A.s. This will help identify where the utilization of financial tools and planning incentives to facilitate development, where fiscally sustainable, may potentially be required to support planning policies regarding intensification within these areas.^[28]

When planning for employment in S.G.A.s/M.T.S.A.s, it is important to consider the following:

- **Not all forms of office development can be accommodated in S.G.A.s/ M.T.S.A.s** – The provincial and local planning policy framework directs larger office developments to M.T.S.A.s, or other S.G.A.s where multi-modal transportation and existing or planned frequent transit service will be available to support live/work opportunities. As discussed in this report, certain commercial and industrial facilities (e.g., manufacturing, assembly, and warehousing) with office uses, training facilities, and showcase rooms/ancillary retail are often integrated on-site. Operations such as these can be land-intensive and have unique siting requirements that are typically not appropriate in mixed-use S.G.A.s or M.T.S.A.s and should be directed to Employment Lands. Furthermore, Employment Lands provide opportunities to accommodate multi-use facilities, such as larger industrial operations adopting a campus-style setting that requires surface parking and future expansion potential.
- **Office development potential outweighs demand** – In planning for office development in S.G.A.s/M.T.S.A.s, the Town of Oakville and the Region of Halton should be realistic about the amount of office growth that might be attracted to these areas over the planning horizon. While O.P.s have provisions in place to encourage office development, the reality is that potential supply opportunities (including future intensification potential) generally outweigh demand. In planning for new office developments within S.G.A.s/M.T.S.A.s, there needs to be corresponding consideration to prioritize development to also create transit-oriented vibrant urban centres and minimize potential competition between locations.

^[28] Please refer to section 6.2 in the Town of Oakville Employment Areas Review – Financial and Market Analysis Technical Report, September 2025.



- **Provide the right long-term environment** – The future success of Employment-Generating Lands (now designated as Business Areas) within Oakville's S.G.A.s/M.T.S.A.s is highly dependent on their ability to provide vibrant spaces for employees, as well as synergies between businesses. This requires a more strategic and flexible approach to planning, one that integrates planning with the Town's *Economic Development Strategy*. With this in mind, the primary objective of planning policies should be to create high-quality, mixed-use urban environments that offer access to high-order transit services, a walkable and cyclable public realm, services and amenities, including restaurants, cafes, shops, daycare facilities, arts and cultural activities, and indoor/outdoor recreational facilities. It should be recognized that such physical qualities are typically what drives successful office real-estate markets over the long term.
- **Encourage proactive planning**– It is recognized that given the comprehensive nature of the O.P. review process and the considerable changes that have been made to the provincial policy framework in recent years, G.G.H. municipalities have been somewhat slow to adopt flexible land use frameworks to address the structural changes in the economy identified in this report. Recent economic trends and industry disruption, however, mandates that the Town of Oakville O.P., Secondary Plans, and zoning allow for opportunities, where appropriate, to encourage transformative change over the long term within S.G.A.s/M.T.S.A.s. This will ensure that businesses are able to effectively respond to the changing environment, new ways of working, and innovation capabilities. Recent trends show that employment spaces and facilities are demanding the ability to integrate different functions. For example, innovation parks and mixed-use spaces combine research institutions, start-ups and labs, office space, co-working areas, and production facilities with recreational amenities and services.



Recommendation 21: Proactively Plan for Office and Mixed-Use Development in S.G.A.s/M.T.S.A.s

- Direct Major Office development to S.G.A.s/M.T.S.A.s that are served with existing or planned high-order transit.
- Target an appropriate level of Major Office development to complement residential development and other population-related functions to create complete communities. Where Major Office development is integrated with industrial uses, it should be directed to Employment Areas where such development cannot be easily accommodated within M.T.S.A.s and other S.G.A.s, due to parcel size constraints or specific circumstances related to land use compatibility and/or site configuration.
- Prioritize infrastructure investment and capacity to facilitate development/redevelopment efforts across S.G.A.s/M.T.S.A.s with the strongest identified real-estate market opportunities.
- Prepare planning and market studies, including proformas, to assess development feasibility opportunities and challenges for office development across S.G.A.s/M.T.S.A.s and inform the potential use of municipal financial incentives and other planning tools to help facilitate development.
- Monitor development activity and corresponding population and employment growth by sector/use within S.G.A.s/M.T.S.A.s on a regular basis.

5.6 Explore Opportunities for Intensification of Employment Lands

Future redevelopment, expansion, and infill opportunities will continue to exist as the Town's Employment Lands mature and evolve. Intensification potential on occupied and underutilized employment lands is not well understood, given uncertainties regarding the future intentions of existing landowners. Subsection 2.8.1 (d) of the P.P.S., 2024, encourages intensification of employment uses and compatible, compact, mixed-use development to support the achievement of complete communities.



Recommendation 22: Encourage the Development and Intensification of Underutilized Employment Lands

- Promote and facilitate intensification/infill opportunities in existing Employment Lands.
- Explore opportunities for infill and redevelopment in mature industrial areas.
- Work with landowners of large infill or redevelopment sites to assess interest in developing the lands and assess the feasibility of development.
- Explore redevelopment opportunities on brownfield industrial sites.

5.7 Growth Monitoring

Throughout the Town's O.P., direction is provided with respect to systematic monitoring, review, and amendment of the O.P. In this regard, the study provides critical input to long-range planning by identifying any future growth, land supply, and land demand, which ultimately informs a comprehensive policy framework to manage change over the planning horizon. Policies providing direction on plan monitoring and evaluation are required to regularly evaluate the forecasts presented in this study (including Employment Generating land supply) as implemented through the Town's O.P.s. Relevant policies should establish a direction to undertake regular reviews and updates of long-term growth forecasts, ensuring the Town provides direction for growth and change in a manner consistent with the P.P.S., 2024, including land use planning and growth management practices that are effective and sustainable over long-term planning horizons. Planning for the growth and utilization of Protected Employment Areas may extend beyond the P.P.S., 2024, planning horizon of 20 to 30 years as per Section 2.1.3. Policies establishing direction for regular plan monitoring and evaluation may include a robust framework that enables the Town to modify growth objectives based on actual supply and demand data, while contemplating a range of planning policy, demographic, and economic factors that influence growth and change over a long-term planning horizon.



Recommendation 23: Regularly Monitor and Benchmark the Development of the Town's Employment Land Supply

- Incorporate a framework to monitor Employment Land supply and employment intensification targets at regular intervals.
- Consider various tools for monitoring employment growth, including comprehensive and interactive web-based growth tracking models to monitor population, housing, and employment growth, as well as performance measures and benchmarking at the planning policy area and neighbourhood level on an annual basis.

Recommendation 24: Plan for and Regularly Monitor the Town's Remaining Land Supply in Both Built-up and Greenfield Areas

- Continue to regularly monitor the Town's finite supply of greenfield lands to ensure sufficient capacity for both residential and non-residential growth. The Town should use the findings of this study to guide the accommodation of future employment growth within its Employment Lands, while drawing on the *Housing Needs Assessment*, *Growth Analysis Studies* and other relevant commercial studies to inform the long-term accommodation of housing and commercial growth to 2051 and beyond.



6. Conclusions

The Employment Areas Review undertaken by the Town of Oakville responds to significant changes in the provincial planning framework, most notably the P.P.S., 2024, which introduces a narrower definition of Employment Areas focused primarily on manufacturing and warehousing functions. The findings and policy directions outlined in this report reflect a comprehensive analysis of local conditions, regional context, and anticipated long-term employment needs.

The key conclusions of this study are as follows:

Provincial Policy Conformity Requires Strategic Adjustments

The implementation of the P.P.S., 2024 requires the Town to redefine and, where appropriate, reconfigure its Employment Lands to align with the revised provincial definition. This presents a complex challenge given Oakville's established pattern of mixed-use employment land development. A thoughtful and strategic approach is necessary to maintain policy conformity while preserving the Town's diverse employment base.

Targeted Employment Area Removals are Justified and Necessary

Through a parcel-level evaluation of employment land function and compliance, several sub-areas within Oakville's Employment Areas have been identified for removal. These areas are characterized by uses that are incompatible with the updated definition and are often adjacent to existing or planned sensitive land uses. These removals help to maintain the existing business function and economic viability of certain areas of the Town and support improved land use compatibility and planning certainty.

The Town's Employment Land Supply is Anticipated to be Fully Exhausted by 2051

Following the removal of certain lands from the Employment Area designation, the Town retains a substantial supply of vacant, developable, and Employment-Generating Lands, particularly in North Oakville. Assuming increasing opportunities for employment intensification in established areas and increased land utilization where appropriate, this land base is anticipated to be fully exhausted prior to 2051, accommodating the Town's



long-term employment growth forecast and supporting continued economic development potential.

It is recognized that the long-term Employment Lands shortfall identified herein may vary, subject to demand on Employment Lands, average employment density levels associated with new construction, and the level of employment intensification achieved over time. Accordingly, it is recommended that the Town regularly monitor its Employment Land supply, building on the input and direction from this review.

Employment Growth will be Broad-Based and Diversified

Between 2024 and 2051, the Town of Oakville is forecast to accommodate approximately 73,700 new jobs, representing an annual growth rate of 1.8%. Growth is expected to be distributed across Employment Areas (45%), S.G.A.s (39%), and Residential and Commercial Areas (17%), supporting a balanced and resilient employment structure.

Employment Densities are Trending Upward within the Commercial and Office Sector but Downward in the Industrial Sector

Employment densities on the Town's Employment Lands have increased over the past decade and are forecast to continue rising. This trend is driven by the development of multi-tenant industrial buildings, integrated office-industrial facilities, and higher-density employment-supportive uses. Higher densities reflect more efficient land use and support a compact urban structure.

While average employment density levels on Oakville's Employment Lands have increased modestly over the past decade, under a narrower definition of Employment Areas that reflects industrial-type uses, average densities in these areas are anticipated to decline gradually over the next several decades.

Planning Policy Updates are Required for Clarity and Flexibility

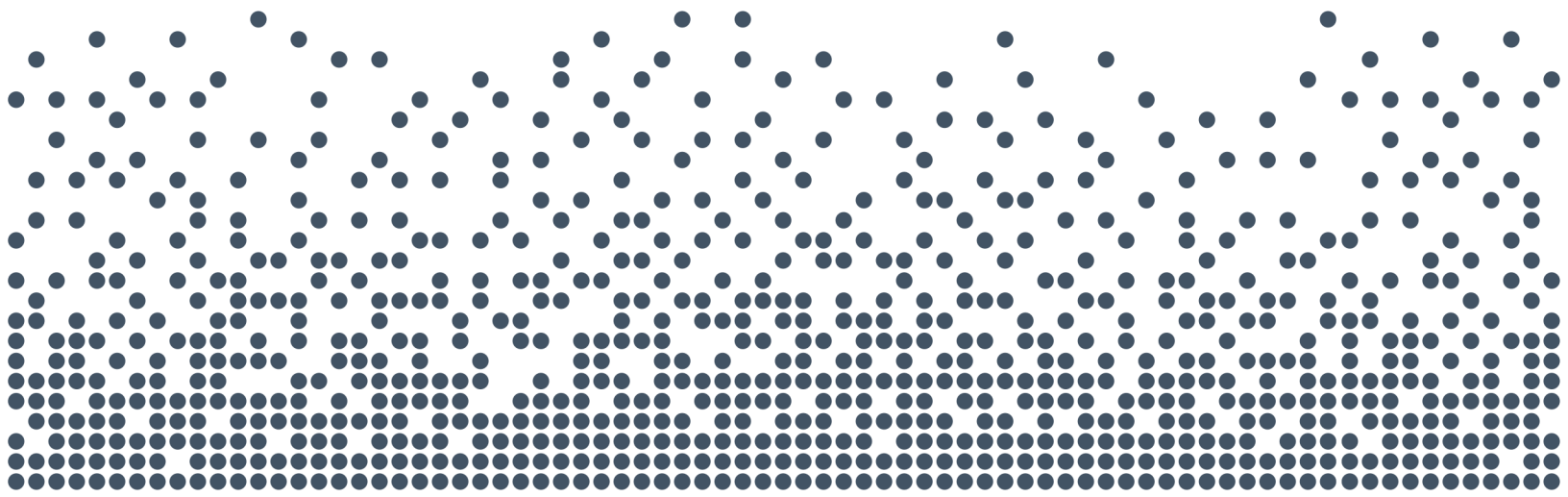
To implement the new land use framework, the Town's O.P.s will require targeted amendments. These include revisions to land use designations, updated permitted uses, and policy language that clearly distinguishes between Protected Employment Areas and Business Areas. This will ensure conformity with provincial policy while allowing for continued support of industrial-type development as well as "employment supportive" commercial and institutional uses across the urban structure.



A Strong Policy Foundation is Needed to Manage On-Going Requests for Employment Land Removals as well as the Protection of Sites on Remaining Employment-Generating Lands

The removal of the M.C.R. requirement under the P.P.S., 2024, increases the likelihood of site-specific removal requests in Employment Lands. Furthermore, as identified through this review, there is a need to protect all remaining Employment-Generating Lands against conversion to non-employment uses, as supported by the long-term employment forecast and land needs analysis summarized in section 4.5 of this review. It is therefore critical that the Town adopt a clear and defensible policy framework to guide future employment land removals and to safeguard the long-term viability and contiguity of Protected Employment Areas as well as the remaining Employment-Generating Lands (now designated as Business Areas).

Overall, this report provides a comprehensive and balanced framework to guide the Town of Oakville in protecting its employment land base, supporting economic growth, and aligning with evolving provincial direction. The policy recommendations presented herein are intended to inform the next phase of O.P. amendments and support the Town's long-term planning objectives.



Appendices



Appendix A

Glossary



Appendix A: Glossary

Big-box retail, refers to large format stores that typically range in size from 20,000 to over 150,000 square feet, depending on the product category sold. These retail stores are usually single-purpose buildings that support national or international chain retailers such as Walmart, Costco, Home Depot, Canadian Tire, Best Buy, etc.

Community Areas refer to lands within the Town of Oakville, but are outside Employment Lands, these lands are planned to support a mix of uses, including the Town's residential, commercial and institutional development.

Employment Land Employment, lands designated in an Official Plan for clusters of certain business and economic uses, including manufacturing, warehousing, offices and associated retail and ancillary facilities.

Employment Areas, as defined by the *Planning Act* and the P.P.S., 2024 and lawfully established uses, which are predominantly intended for industrial uses

Employment-Generating Lands, which refer to lands that no longer meet the revised definition of Employment Areas under the Planning Act but are still intended to contribute to employment growth within the Town of Oakville. These lands support employment-generating activities such as major office and other employment-supportive uses that may not typically be located in mixed-use or commercial areas. It should be noted that these lands do not support major commercial and/or retail uses.

Employment Lands refers to the Town's overall supply of lands which support job-creation, including a range of non-residential uses, both industrial and non-industrial in nature. Employment Lands are comprised of Employment Areas and Employment-Generating Lands.

Major Office as defined by the *Land Needs Methodology for the Greater Golden Horseshoe*, means freestanding office buildings of approximately 1,900 square metres of floor space or greater, or with approximately 200 jobs or more.

Major Transit Station Area, as defined in the P.P.S., 2024, means the area including and around any existing or planned higher-order transit station or stop within a settlement area; or the area including and around a major bus depot in an urban core. Major transit station areas generally are defined as the area within an approximate 500 to 800-metre radius of a transit station.

No Fixed Place of Work, as defined by Statistics Canada, describes individuals who do not go to the same workplace location at the beginning of each shift, such as travelling salespeople, independent truck drivers, and many construction or landscape workers. This category is one of several "place of work statuses" used to classify employed individuals, alongside working at home, working outside Canada, or working at a specific, usual location.



Population-Related Employment, refers to the employment that exists in response to the resident population, and includes retail, education, health care and home-based employment.

Strategic Growth Area, These are areas identified in the Town of Oakville Official Plan, as Nodes and Corridors and include M.T.S.A.s and other strategic sites that are positioned to accommodate intensification. The strategic growth areas provide opportunities to accommodate high-density employment opportunities, such as mixed-use developments and office developments.