

BRAMPTON PLAN



EMPLOYMENT & RETAIL



















EXECUTIVE SUMMARY

The City of Brampton is preparing a new Official Plan to guide growth and development over the next 30 years. The new Official Plan, titled “**Brampton Plan**”, builds on the extensive work completed through the 2040 Vision.

A component of the Brampton Plan project involves studying issues in more detail, as identified through the work on the 2040 Vision, or identified through engagement with Council, stakeholders, and the public. To ensure these issues are appropriately addressed and considered through the development of policy, seven Discussion Papers are being prepared, which generally align with the themes and findings of the Brampton 2040 Vision. These Discussion Papers are noted below and represent a starting point for generating discussion about general policy issues that will be addressed in subsequent phases of the Brampton Plan Project. Brampton Plan comprises five phases, with multiple opportunities for residents to engage with the City and shape the future of Brampton’s growth.

		Arts and Cultural Heritage
		Attainable and Supportive Housing
		Natural Environment, Climate Change & Resiliency
		Implementation of the Growth Management Framework and Official Plan Structure
		Employment and Retail
		Transportation and Connectivity
		Urban Design, Open Spaces and Recreation

Focus Areas of the Official Plan Review

While there are seven distinct Discussion Papers, the themes within each paper often connect with concepts or ideas discussed in another paper. The Discussion Papers are also written through a lens of accessibility, diversity, sustainability and inclusion to ensure the recommendations consider multiple perspectives and raise awareness related to socio-economical issues impacting City of Brampton residents.

This Discussion Paper examines the **Employment and Retail** landscape of the City of Brampton and issues, including positive and disruptive economic impacts related to labour force demand, industrial, office and retail space requirements, as well as long-term employment land needs for the Region of Peel and City of Brampton. Some of the main recommendations are:

1) Plan to reduce out-commuting and encourage more live/work opportunities:

- Consider policy enhancements to strengthen the City’s ability to accommodate employment uses/sectors associated with structural changes in an evolving economy.
- Include Official Plan policies that work together with Council’s economic development initiatives to support the City’s overall economic competitiveness and growth objectives.

2) Plan employment growth in concert with transit investments.



- Explore opportunities to increase employment through intensification on employment land and commercial sites.
- Protect Employment Areas to ensure the diversity of the City's Employment Base.
- Develop a local conversion policy framework that builds on the Region policy framework and assists with the Region's review of potential conversions.

3) Plan for a Competitive Office Market:

- Prioritize planning efforts for major office around areas with existing or planned high-order transit.
- Leverage key innovation and education synergies by providing connectivity to major office nodes.

4) Update the Commercial Policy framework to facilitate complete communities supported by alternative modes of transportation:

- Create a mixed-use (commercial-residential) hierarchy that is aligned to a centres and corridors policy approach and based on densities.

This is a starting point for generating discussion about Employment and Retail considerations for implementation in Brampton Plan. A Policy Directions Report will follow and will outline detailed changes proposed for inclusion in Brampton Plan. The directions and recommendations presented in this discussion paper will be refined through subsequent consultation with the public. Engagement opportunities for a full range of stakeholders to provide input and perspective on these policy issues will be available in the coming months.

Discussion Papers pertaining to each of the Brampton Plan Focus Areas can be accessed online at the Brampton Plan project website: Brampton.ca/BramptonPlan.

Let' Connect!

Comments and feedback on the Discussion Papers can be provided on the Brampton Plan project website or emailed to opreview@brampton.ca.



Table of Contents

Executive Summary	ii
1 Introduction.....	1
1.1 Background.....	1
1.2 What is an Official Plan?	2
1.3 Brampton Plan Program.....	2
1.4 What is a Discussion Paper?	3
1.5 Purpose of this Discussion Paper	4
2 Policy Context.....	6
2.1 Provincial Legislation	6
2.1.1 Planning Act	6
2.1.2 Provincial Policy Statement, 2020.....	6
2.1.3 A Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2020	7
2.1.4 Provincial Land Needs Assessment Methodology.....	7
2.2 Regional Context	7
2.2.1 Region of Peel Official Plan	8
2.2.2 Peel 2041+ Municipal Comprehensive Review	8
2.3 City of Brampton Context.....	8
2.3.1 City of Brampton Official Plan	8
2.3.2 City of Brampton 2040 Vision.....	9
3 Planning for Employment Areas in the City of Brampton	11
3.1 Employment Trends, Disruptors and Outlook	11
3.1.1 Service-Providing Sectors Leading Employment Growth	11
3.1.2 Technology Change and Knowledge-Based Sector	12
3.1.3 Recognizing Local Economic Strengths in the City of Brampton within the Context of the Broader Regional Economy	14
3.1.4 City of Brampton Employment Growth Trends	15
3.1.5 E-Commerce and Technology as a Major Retail Disruptor.....	16
3.2 City of Brampton Employment Forecast to 2051	17
3.3 Employment Areas.....	18
3.3.1 What are Employment Areas?	18
3.3.2 City of Brampton Employment Areas	19



3.3.3	Why Employment Areas are Important?.....	21
3.3.4	Planning for the Changing Nature of Employment Areas	21
3.4	Principles for Approaching the Evaluation of Employment Conversions.....	22
3.5	Major Office Market.....	23
3.5.1	Major Office Market in Brampton.....	24
3.5.2	Planning for a Competitive Major Office Market	24
3.6	Retail Commercial Structure	26
3.6.1	Retail Market in Brampton.....	26
3.6.2	Planning Considerations for an Evolving Retail Market	27
4	Policy Recommendations and Strategic Directions	28
5	Next Steps	30



1 INTRODUCTION

1.1 Background

The current City of Brampton Official Plan (the Official Plan) was adopted by Council in 2006 and approved by the Ontario Municipal Board in 2008. In October 2013, City staff received direction from the Planning and Development Committee to initiate a scoped review of the Official Plan. However, in 2017, the scoped review was put on hold pending the outcome of the “Brampton 2040 Vision: Living the Mosaic” (the 2040 Vision) process. Commencing in Fall 2017, the 2040 Vision process broadly engaged residents and stakeholders across the community to foster public discussion about the future of Brampton. Following this extensive engagement, the City’s 2040 Vision was endorsed by City Council in June 2018.

The City’s Official Plan Review was subsequently re-launched in Fall 2019 to build on the work completed through the 2040 Vision and to prepare a new Official Plan (hereinafter referred to as ‘Brampton Plan’) to guide growth and development over the next 30 years.

The drivers for undertaking a review of the Official Plan is three-fold:

Driver #1: Provincial Policy Consistency and Conformity

First, the City is required to review its Official Plan in accordance with the requirements of the **Planning Act** to ensure consistency with the **Provincial Policy Statement**, 2020 and to ensure conformity with the **Growth Plan for the Greater Golden Horseshoe**, including Amendment 1 (2020), applicable Provincial Plans, and the Region of Peel Official Plan.

Driver #2: Region of Peel Official Plan Conformity

Second, the Region of Peel initiated the Peel 2041+ Municipal Comprehensive Review (MCR) to bring the Regional Official Plan (ROP) into conformity with the current Growth Plan and guide the Region’s population and employment growth to 2051. Brampton Plan is required to conform to the ROP.

Driver #3: Reflecting the 2040 Vision

Third, the 2040 Vision is intended to re-imagine Brampton to 2040 and proposes a future structure of the community, including areas of growth and intensification that respond to the seven key focus areas of the Vision. The 2040 Vision provides guidance for new Brampton Plan policy and sets overarching objectives for community and stakeholder engagement.

To Learn More

The Regional Official Plan is currently under review! Email [Regional Planning and Growth Management](#) to join their stakeholder list, stay up to date on upcoming meetings, and submit comments.



1.2 What is an Official Plan?

Official Plans are developed under a framework established by the Province of Ontario to ensure that short-and long-term growth is coordinated in a manner that meets local social, economic, built and natural environment needs and aspirations. Municipal Official Plans must be consistent with the **Provincial Policy Statement, 2020** (PPS, 2020) issued under the **Planning Act**, and must conform to, or not conflict with any applicable Provincial and Regional Plans, including the **A Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2020** including amendment 1 (the Growth Plan), the **Greenbelt Plan, 2017** and the Region of Peel Official Plan, as they relate to the City of Brampton.

These overarching policy documents provide direction to the City on land use planning matters. Overall, Official Plan policies establish:

- How to promote economic development and develop community improvement initiatives;
- How to protect and conserve cultural heritage resources;
- How to protect and enhance the city's environmentally sensitive areas;
- Where new housing, industry, offices and shops will be located;
- What community infrastructure, such as roads, transportation, utilities, parks, trails and schools will be needed to accommodate growth and develop healthy and sustainable communities; and
- Where, and in what order, different parts of the community will grow.

The development of Brampton Plan offers an opportunity to adopt a contemporary and strategic set of policies that will guide growth and development over the planning horizon and direct physical change and its affects on the social, economic, built, and natural environment of the city.

1.3 Brampton Plan Program

The Brampton Plan process will be completed across five phases. An overview of the project timeline, including the purpose of the different phases is presented in Figure 1 and listed below. Each phase of this project is associated with major deliverables and tailored consultation and engagement tactics.

The Brampton Plan work program includes the following phases:

Phase 1 – Background Review & Community Engagement Strategy

To introduce the project to the community and undertake a review of relevant background information.

Phase 2 – Test the Vision & Development Growth Scenarios

To assess and identify growth scenarios to contribute to the development of population and employment forecasts.

Phase 3 – Policy Analysis and Community Structure

To review existing Official Plan policy and confirm conformity with Provincial policy and plans. An updated community structure is proposed, and community and stakeholder meetings are being held to obtain feedback on the draft community structure.



Phase 4 – Discussion Papers and Policy Recommendations (current phase)

To prepare Discussion Papers to organize City priorities regarding emerging planning issues and report back on community feedback. A Policy Directions Report will also be prepared to assess new and emerging planning policy and research on directions for the policies and schedules of Brampton Plan.

Phase 5 – Draft Brampton Plan

To undertake the technical writing, reviewing, testing, and implementation of updates to Brampton Plan based on work completed to-date.

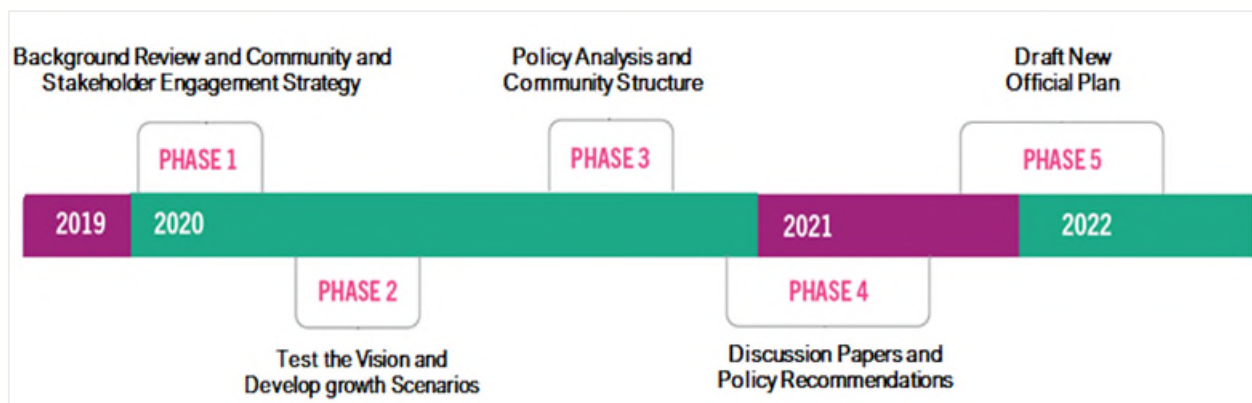


Figure 1: Brampton Plan project timeline

1.4 What is a Discussion Paper?

The current phase of the development of Brampton Plan includes the release of seven topic-based Discussion Papers, which align with the themes and findings of the Brampton 2040 Vision.

The papers are meant to get readers thinking about solutions for solving problems and charting a course for the city’s future. The Discussion Papers set the stage for subsequent policy direction.

Some things to consider when reading the papers, include:

- Has the project team accurately captured the issues of importance to the city?
- Given this information, how do you see the city best developing and responding to current and potential future issues over the next 30 years?
- What ideas/solutions come to mind when reading the information?

Let’s Connect!

If you have any comments to provide arising from the discussion papers, please send them to opreview@brampton.ca.



1.5 Purpose of this Discussion Paper

Building on the work completed in 2019 and 2020, seven Discussion Papers are being prepared as the first deliverable of Phase 4 of Brampton Plan work program to guide focused subject matter reviews. Deliverables of the first phases of Brampton Plan process included the following:

- **Document Review and Gaps Analysis**, to understand key gaps and topics that need to be addressed in Brampton Plan;
- **Policy Benchmarking Exercise**, to ensure that recent policy changes at the Provincial and Regional levels have been accounted for and their implications understood.
- **Policy Conformity Matrix**, to identify specific policies in the current Official Plan and determine how they meet the requirements of Provincial and Regional Policy;
- **Preliminary City Structure**, which was presented for community input; and,
- **Secondary Plan Consolidation Strategy**, to understand the role of Secondary Plans in Brampton Plan.

Building upon work completed in earlier phases of Brampton Plan process, Discussion Papers are themed according to seven (7) areas that are identified in Figure 2.

While there are seven specific Discussion Papers, the themes within each paper are not exclusive and often connect with concepts or ideas discussed in another paper. These papers are also written with accessibility, diversity, sustainability and inclusion lenses to ensure the policy recommendations are prepared taking into account multiple perspectives and to raise awareness related to socio-economical issues impacting City of Brampton residents.

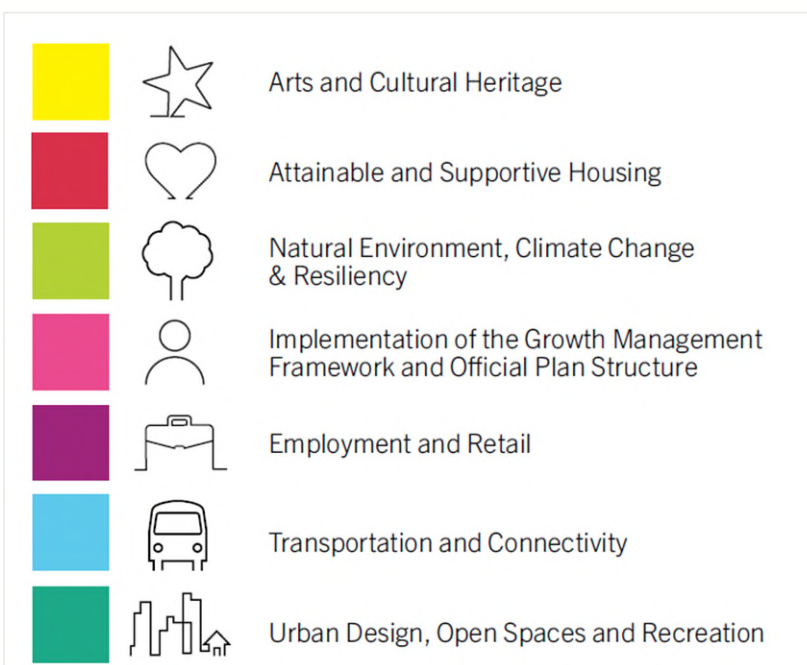


Figure 2: Focus Areas of the Official Plan Review

This Discussion Paper examines the **Employment and Retail** landscape of the City of Brampton and issues, including positive and disruptive economic impacts related to labour force demand, industrial, office and retail space requirements, as well as long-term employment land needs for the Region of Peel and City of Brampton. Building on the contents presented in this Discussion Paper, a series of employment strategic directions have been proposed. Each strategic direction is associated with policy recommendations for how policy directions will be crafted in the next stage of the City's Official Plan Review (hereto referred to as the Brampton Plan), subject to further community consultation.

This is a starting point for generating discussion about Employment and Retail to help achieve the employment growth forecast through policy recommendations and addressing growth and economic development objectives. A Policy Directions Report will follow and will outline detailed changes proposed for inclusion in Brampton Plan.



2 POLICY CONTEXT

Official Plans are written and guided under a framework of overarching policies and plans established by the Province of Ontario. Provincial policy is implemented at the Regional level first, through the Peel Region Official Plan, and then implemented through lower-tier official plans, like Brampton Plan.

The key roles and requirements of the Provincial and Regional policies and legislation that Brampton Plan will need to address in establishing policies related to employment and retail considerations are summarized below.

2.1 Provincial Legislation

Provincial planning legislation and policies directly influence employment and retail-related considerations in Brampton Plan. This section outlines these key considerations, as well as key changes to Provincial legislation and policies since the Brampton Official Plan was last updated.

2.1.1 Planning Act

The **Planning Act (1990)** is the enabling legislation for land-use planning in Ontario. The **Planning Act** sets out the framework for statutory planning and identifies the delegated powers for municipal land-use planning. The **Planning Act** establishes that the adequate provision of employment opportunities is a matter of provincial interest and provides the legislative framework that is further implemented through several other provincial plans including the **Provincial Policy Statement (PPS), 2020**, and **Growth Plan, 2020 (A Place to Grow: Growth Plan for the Greater Golden Horseshoe (GGH))**.

2.1.2 Provincial Policy Statement, 2020

The PPS, 2020 provides policy direction on matters of provincial interest relating to land use planning and development. It is issued under the authority of section 3 of the **Planning Act** and requires that all planning decisions “shall be consistent with” the PPS, 2020 (**Planning Act**, R.S.O. 1990, P. 13 s. 3). Notable policies related to planning for Employment Areas in the updated PPS, 2020 include requiring municipalities to have enough urban land supply to meet projected needs for a planning horizon to 2051. An Employment Area is an area with a cluster of business and economic activities protected from sensitive uses, such as a residential and major retail.

The PPS, 2020 recognizes the significant economic contribution of Employment Areas, and the importance of protecting and preserving them. The PPS, 2020 provides details on how municipalities should plan for employment. The PPS, 2020 policies suggest preparing and readying Employment Areas by identifying strategic sites, monitoring the availability and suitability of employment sites with a focus on marketable sites, and actively seeking to address potential barriers to investment (policy 1.3.2). The policy further outlines that, during an OP review or update, planning authorities are required to address Employment Areas to ensure the designation is appropriate for the planning function of the Employment Area (policy 1.3.2.2).



2.1.3 A Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2020

The Growth Plan, 2019, which was created under the *Places to Grow Act, 2005*, was updated in May 2019 and amended in August 2020. It sets out where and how growth will occur across the Greater Golden Horseshoe (GGH) to 2051 and that all planning decisions shall conform to it. The Growth Plan, 2020 provides growth forecasts for single- and upper-tier municipalities and provides policy direction on a range of matters including land use, infrastructure, and transportation.

in accordance with the Growth Plan, municipalities are encouraged to delineate Urban Growth Centres (UGCs), as well as provide opportunities for compact urban form and high-density employment uses like commercial, office and major institutional uses. These uses are also to be planned. Further, the area municipalities are required to identify intensification corridors, MTSA and other intensification opportunities to support higher densities, support viability of transit and encourage a mixed-use development.

2.1.4 Provincial Land Needs Assessment Methodology

On June 16, 2020, the Minister released the proposed Land Needs Assessment (LNA) methodology in the GGH for consultation. The LNA methodology prescribes the key steps to establishing Employment Area land needs. The key steps for Employment Area land needs are found in section 3 of the LNA methodology.¹ Upper- and single-tier municipalities in the GGH are required to use the methodology in combination with the policies of the Growth Plan, 2019 to assess the quantity of land required to accommodate forecast growth.

In accordance with the LNA methodology, land needs are to be assessed across two different areas including Community Areas and Employment Areas, as defined below:

- **“Community Areas:** Areas where most of the housing required to accommodate the forecasted population will be located, as well as most population-related jobs, most office jobs and some employment land employment jobs. Community areas include delineated built-up areas and designated greenfield areas.”
- **“Employment Areas:** Areas where most of the employment land employment jobs are (i.e. employment in industrial-type buildings), as well as some office jobs and some population-related jobs, particularly those providing services to the Employment Area. Employment Areas may be located in both delineated built-up areas and designated greenfield areas.”²

2.2 Regional Context

The Region of Peel establishes policies related to economic development activities such as employment and retail uses, including defining Employment Areas as key centres of economic activity. Brampton Plan must conform to the Region’s policy framework.

¹ Land Needs Assessment Methodology for the Greater Golden Horseshoe (2020), pp. 15 to 18.

² Land Needs Assessment Methodology for the Greater Golden Horseshoe (2020), pp. 6 and 7.



2.2.1 Region of Peel Official Plan

The Region of Peel Official Plan (ROP) December 2018 Consolidation, defines Employment Areas as key centres of economic activity designated in area municipal official plans and accommodate uses such as manufacturing, warehousing, offices, associated retail and ancillary facilities. The ROP provides the following guidance for Employment Areas by:

- Directing area municipalities to ensure adequate supply of employment lands and monitor the supply on an annual basis;
- Directing area municipalities to include a range of employment designations;
- Assisting area municipalities in economic development and development of employment areas through provision of regional infrastructure and services;
- Protecting and supporting employment areas; and
- Encouraging sustainable development imperatives.

2.2.2 Peel 2041+ Municipal Comprehensive Review

Peel Region is currently undergoing its Official Plan Review process, which was initiated in 2013 and is expected to be completed in 2022. As a part of the review process, various Provincial growth drivers have been analysed and the Region has identified thirteen focus areas to review conformity with recent updates to the PPS 2020, Growth Plan 2019, Oak Ridges Moraine Conservation Plan 2017 and the Niagara Escarpment Plan (2017). Employment Area policies have been examined as a part of the MCR exercise and as per draft Official Plan Consolidation of 2020, some of the additions are suggested in the following areas:

- Importance of new infrastructure such as strong transit connectivity to a qualified labour force and affordable symmetrical broadband internet;
- Beyond Employment Area designations the regional and local OPs, support a mix of uses and major office development in Strategic Growth Areas;
- On the periphery of Employment Areas, permit accessory retail and commercial uses that serve the workers in the Employment Areas, provide a buffer to sensitive land uses, and benefit from visibility and access to transit; and
- Permit retail, residential, commercial, and non-ancillary uses without the requirement of an amendment to the Regional Official Plan in select identified areas, subject to site specific and municipally-initiated comprehensive planning studies.

2.3 City of Brampton Context

The City of Brampton is required to implement Provincial and Regional direction through Brampton Plan and land use planning decisions by City Council. It is important to understand how the current Brampton Official Plan addresses employment and retail considerations and how the 2040 Vision provides direction to consider in Brampton Plan as summarized below.

2.3.1 City of Brampton Official Plan

The City of Brampton 2006 Official Plan (September 2020 consolidation) identifies the physical structure of the City to have different elements including built boundary, central area, MTSA, mobility hubs, intensification corridors, Employment Areas, communities, unique communities



(i.e. communities that possess unique cultural, historic, natural, and landscape qualities which are valued by the communities) and a vast open system & natural heritage system.

As per Section 3.2.7 of the OP, the City's major employment districts are strategically located in relation to the major transportation infrastructure and facilities including the Lester B. Pearson International Airport, CP & CN intermodal terminals, rail, transit, major roads and Provincial freeways i.e., Highways 410, 407, and 427. Future development in this sector is envisaged to be more compact and integrated with public transit to provide an alternative mode for work related trips.

The plan identifies Business Corridor and Industrial designations as Employment Areas. Business Corridor designation includes linear commercial and industrial development along certain sections of the City's major roads, with boundaries for these corridors refined in the City's respective Secondary Plans. The Business Corridor designation can include sub-designations (such as Prestige Industrial, Office, Mixed Commercial/Industrial, Highway Commercial, Service Commercial, Highway and Service Commercial and Business) and are regulated as per the provisions of the City's OP.

Industrial use includes light to heavy industrial uses such as manufacturing, processing, repair and service, warehousing, and distribution. Corporate Offices and uses such as research and development facilities are also permitted in the Industrial designation. Major retail development is not permitted in industrial areas.

Commercial uses within the City service Brampton's population and are generally concentrated in three main locations: Central Area, Office and Retailing areas (including Regional, District and Local Retail). The City's new communities are to be developed in Designated Greenfield Areas (DGA), which are restricted given that Brampton's urban boundary extends to the municipal limits. Keeping this in mind, priority and consideration is to be given to compact development and appropriate form of infilling.

2.3.2 City of Brampton 2040 Vision

The Brampton 2040 Vision: Living the Mosaic is a City's vision guiding the Brampton's development over the next 20 years. The vision intends to bring about transformations to the City in various themes including jobs, communities, infrastructure and connectivity, art and culture, design, sustainability. Vision 2 states that 'In 2040, Brampton will be a mosaic of vibrant centres with quality jobs, a rich range of activities, and integrated living'. Some of the actions aimed towards fulfilling the vision include:

- Identify a new urban core for the City in addition to the downtown in order to capture immediate development opportunities;³
- Realize the full potential of Brampton's historic Downtown as an advanced education, arts, and life sciences hub;

³ The Vision document identifies the area as 'Uptown Brampton' which is to be designed as a major new custom-designed, transit-oriented work/live civic core for business, commerce, leisure, and tourism.



- Consolidate a local-oriented work/live business magnet in each of five sectors of the City to bring suitable jobs and leisure offerings closer to home;⁴
- Add a centre of supportive mixed uses in each logistics/ industrial district for nearby access of workers and businesses; and
- As of 2016, 36% of Brampton residents worked within the City. Under Vision 2040, a long-term goal is to identify a public-private economic development facilitator to position Brampton as a preferred regional business and jobs hub and shift to 60% of residents' jobs at home.
- Update and revitalize Bramalea as a model of the next generation of comfortable, sustainable living.

The Vision proposes a network of diversified centres for the City as preferred locations to work, live, learn and play. The Plan proposes five lower scaled and walkable town centres, one in each area of the City. The existing industrial and logistics districts are proposed to remain with ancillary centres to be added for each district.

⁴ Five new Town Centres will form a constellation, arrayed around central Brampton. These will include Bram East in the northeast, Trinity Commons in north-central sector, a new development node in Heritage Heights in the northwest, the Bramalea GO Town Centre In the southeast, and in the southwest, Bram West will enjoy synergies from further south.



3 PLANNING FOR EMPLOYMENT AREAS IN THE CITY OF BRAMPTON

3.1 Employment Trends, Disruptors and Outlook

There are structural changes occurring in the macro-economy that will generate both positive and disruptive economic impacts related to labour force demand, industrial, office and retail space requirements, as well as long-term employment land needs for the Region of Peel and City of Brampton. As discussed in the Growth Management Discussion Paper, COVID-19 has been disrupting work patterns and real estate trends as increased remote work opportunities will continue to exist as the pandemic resides. This section provides a brief overview of these broad trends.

3.1.1 Service-Providing Sectors Leading Employment Growth

While the economy of the Greater Toronto and Hamilton Area (GTHA) is highly diversified, it has undergone a major restructuring over the past two decades. The most significant change has been the decline in the proportion of employment in the manufacturing sector, largely driven by automation and offshoring.

Across the GTHA, employment sectors which provide services to the population base (Services-Providing) have been growing at a relatively stronger pace than Goods-Producing sectors. Over the past 5 years, approximately 74% of the employment growth within the GTHA has comprised employment growth within the service-providing sectors, while the remaining 26% of the employment growth has comprised sectors involved in the movement of goods. Due to superior connectivity of transportation networks (airport, intermodal and highways) and supply of employment lands, Peel Region has accommodated a larger share of employment in Goods Movement and Goods Producing compared to other Regions within the GTHA. Approximately 41% of the employment growth over the past five years within Peel Region has occurred within the Goods Movement and Goods Producing sectors, when compared to 26% growth on average within the entire GTHA, as summarized in Figure 3.

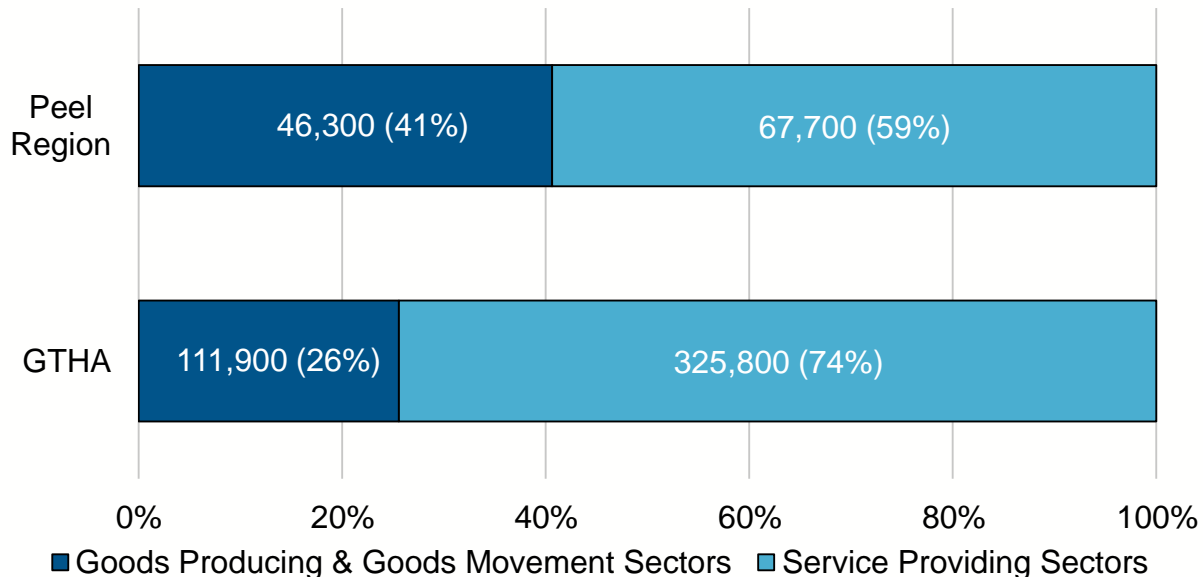
Key Terms

Goods Movement // means sectors associated with the movement of goods, includes transportation, warehousing and wholesale trade sectors.

Goods Producing // means sectors associated with production of tangible goods, including manufacturing, construction, utilities and agriculture.

Service Providing // means sectors associated with the provision of services, including commercial and institutional sectors.





Source: Derived from OMAFRA EMSI Analyst by Watson & Associates Economists Ltd.

Figure 3: Greater Toronto and Hamilton Area (GTHA) and Peel Region Population Growth by Sector Type, 2015 to 2020

This shift in employment by sector impacts planning for employment, including land use and built form which will be explored later in this discussion paper. While the GTHA overall is experiencing a more profound shift towards service providing sectors, Peel Region is still attracting a greater share of the GTHA's Goods Producing and Goods Movement sectors, more recently accommodating nearly half of the GTHA's growth in those sectors. Within Peel Region, the City of Mississauga has accommodated nearly two-thirds of the recent employment growth in those sectors, while Brampton has captured just over a quarter and Caledon representing less than 10%.⁵

3.1.2 Technology Change and Knowledge-Based Sector

The City of Brampton, similar to the GTHA economy as a whole, is experiencing a labour shortage in a wide range of sectors. Labour force shortages are anticipated to continue as Baby Boomers steadily retire; however, over the long-term this may be gradually offset by disruptions driven by technology and automation. According to the Brookfield Institute for Innovation + Entrepreneurship, over the next 10 to 20 years, 42% of the Canadian labour force is at high risk of being affected by automation, either through significant task restructuring or elimination. Jobs that are anticipated to be most highly impacted by automation are primarily within occupations that are administrative, routine, or oriented towards sales and service. The Brookfield Institute report also notes that highly-skilled occupations are expected to grow much more quickly than the rest of the labour force and are at a lower risk of being negatively affected by automation.⁶

⁵ Based on employment growth between 2015 and 2020 utilizing OMAFRA EMSI Analyst data.

⁶ The Talented Mr. Robot. The impacts of automation on the Canadian workforce. Brookfield Institute for Innovation + Entrepreneurship. June 2016.



This suggests that more highly skilled labour will be a significant driver of Canada's future economic growth.

Considerable research has recently been undertaken by institutions and consulting agencies to assess the potential impacts of artificial intelligence (AI) to businesses as well as its broader impacts to the global economy. A report prepared by PricewaterhouseCoopers (PWC) in 2017 identified that the net impacts to global Gross Domestic Product (GDP) resulting from AI are anticipated to contribute up to \$15.7 trillion to the global economy in 2030, more than the current output of China and India combined. The report also identifies that over the next decade, AI will generate massive disruption as both established businesses and new entrants drive innovation and develop new business models. While the long-term net economic impacts of automation and/or AI appears to be positive, global competition from both established and emerging markets looking to capitalize on potential opportunities related to this technology will be increasingly fierce. To prevent an undesirable, lose-lose scenario associated with anticipated technological change in the economy – talent shortages, unemployment, and growing inequality – a number of critical actions are needed. This includes businesses assuming an active role in supporting their existing workforce through reskilling and upskilling, individuals taking a proactive approach to their own lifelong learning, and governments creating an enabling environment to assist in these efforts.⁷

Building on the City of Brampton's strong institutional and community foundations, including the emerging Brampton Innovation District and post-secondary partnerships with Sheridan College, Ryerson University and Algoma University, the City has the ability to influence its readiness towards an ever-evolving knowledge-based economy through on-going leadership and investment. Ultimately, these efforts are anticipated to enhance future youth in-migration levels and employment opportunities throughout the City geared towards an increasingly skilled labour force.

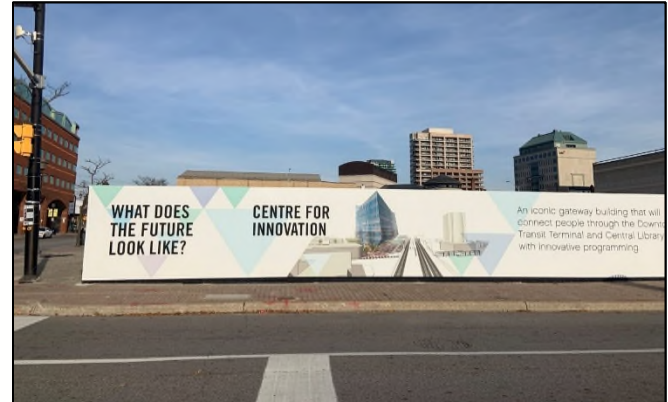


Figure 4a: Site of Centre for Innovation, Downtown Brampton



Figure 4b: Algoma University, Downtown Brampton

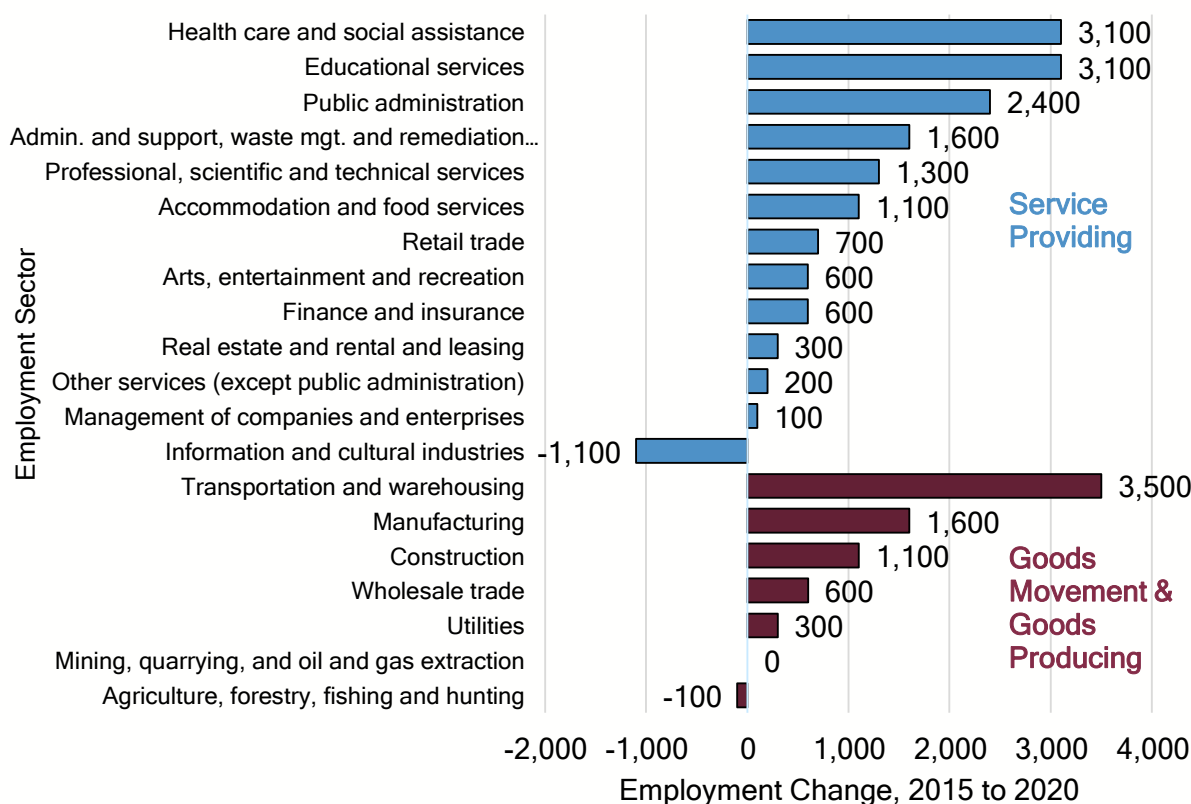


Figure 4c: Ryerson Venture Zone in Brampton, industry-driven tech incubator operated by Ryerson University
Image Source: Ryerson University

⁷ Sizing the Prize. What's the real value of AI for your business and how can you capitalise? PWC. 2017

3.1.3 Recognizing Local Economic Strengths in the City of Brampton within the Context of the Broader Regional Economy

In many respects, the City of Brampton’s economic growth potential is reliant on the success of the broader regional economy of Central Ontario, which is also referred to as the Greater Golden Horseshoe (GGH). Many of the largest and fastest growing employment sectors across the GGH and the Region of Peel have also experienced growth and expansion over the past decade in the City of Brampton. Similar to the GGH as a whole, the City of Brampton experienced employment growth in most employment sectors from 2015 to 2020, as summarized in Figure 5. Among the Goods Producing and Goods Movement sectors, Transportation & warehousing sector added the most jobs over this period, followed by manufacturing and wholesale trade. Strong population growth within the City of Brampton has also fueled steady growth in the Servicing-Providing sector, in particular those that primarily serve the local population, including health care & social assistance, education and public administration. While jobs associated with information and cultural industries have declined over this period, it is important that the City continue to plan for the importance of creative industries. Cross-collaborations between artists, creative producers and creative entrepreneurs can yield great benefits and can position Brampton as a truly “creative city”. Creative industry and entrepreneurship should be included as part of the emerging cultural ecosystem in Brampton.



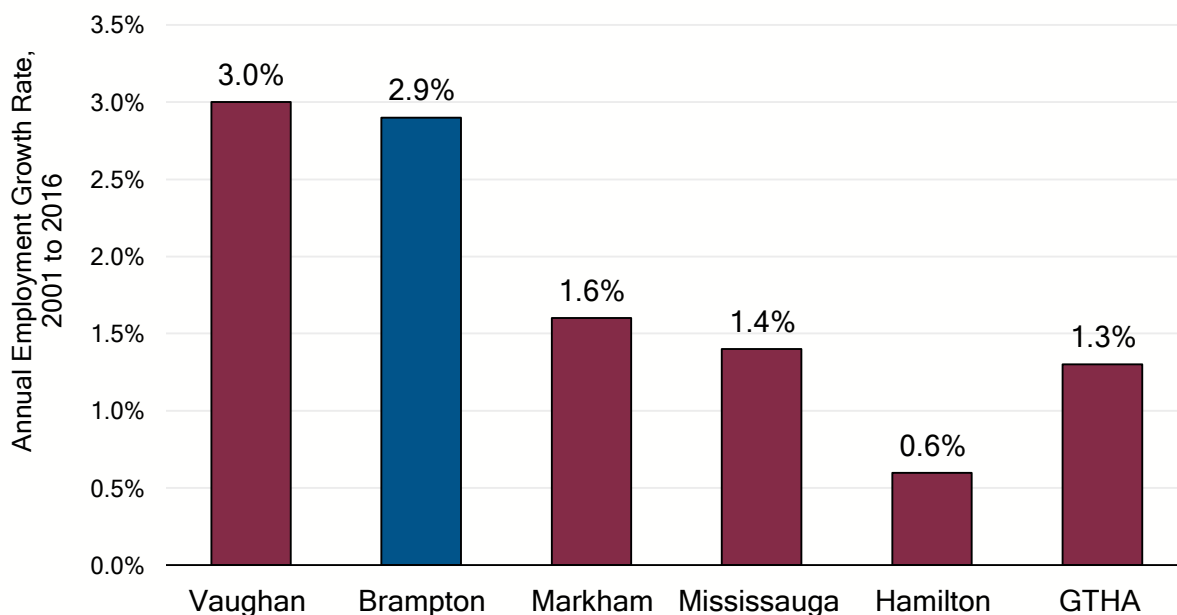
Source: Derived from OMAFRA EMSI Analyst by Watson & Associates Economists Ltd.

Figure 5: City of Brampton, Change in Employment by Sector, 2015 to 2020



3.1.4 City of Brampton Employment Growth Trends

Over the 2001 to 2016 period, the City of Brampton achieved a high rate of employment growth, at annual growth rate of 2.9%, as summarized in Figure 6. Employment growth within the City of Brampton over this period outpaced growth within the GTHA and other large municipalities, including the City of Markham, City of Mississauga and City of Hamilton. Over the next 30 years, it is anticipated that the City of Brampton will continue to achieve a strong rate of employment growth, although at a slightly lower annual growth rate recognizing an aging labour force in the GTHA, and key disruptors as previously discussed. The City of Brampton is well positioned to accommodate a large share of the GTHA employment growth. The City of Brampton has good connectivity to transportation networks, a growing population base, a younger local labour force (relative to the rest of the GTHA), a preferred Ontario location for foreign investment in industry, and an employment base diversifying and moving towards innovation and technology which bode well for future employment growth.⁸



Source: Derived from Statistics Canada Place of Work employment data by Watson & Associates Economists Ltd.

Figure 6: Historical Employment Growth Rates, 2001 to 2016 by Comparator Municipalities

⁸ Based on City of Brampton, Invest Brampton website.



3.1.5 E-Commerce and Technology as a Major Retail Disruptor

E-commerce sales in Canada have grown at a rate that is five times the pace of overall growth in retail trade. E-commerce sales account for at least 6% of total Canadian retail spending.⁹ The rise of e-commerce has reduced the demand for retail square footage, in particular retail space for the sale of goods-based retailers.¹⁰ The recent impacts of COVID-19 have been accelerating these trends, as in-person retail closures have resulted in more consumers utilizing e-commerce platforms for their shopping needs. While e-commerce has been capturing market share from goods-based retailers, growth in specific service-based retailers continues as they provide social experiences and other services that cannot be purchased remotely. Service-based retailers,¹¹ typically have smaller footprints than goods-based retailers and, therefore, offer greater flexibility for intensification areas. In addition, service-based retailers are driving the intensification of power centre and shopping centre sites across Canada by adding retail space to parking lots (pad sites) and occupying vacant retail space previously utilized by goods-based retailers. Within the City of Brampton, Bramalea City Centre has been a site for a number of expansions (pad sites), while retail space formerly occupied by goods-based retailing space such as Home Outfitters, Target and Future Shop have been re-purposed for a variety of commercial uses.

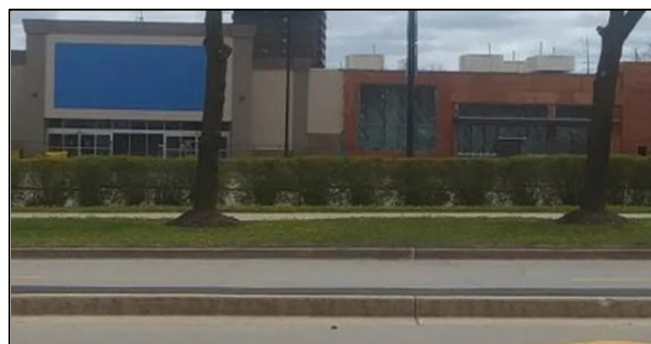


Figure 7: Vacant Retail Space, Re-purposed, Bramalea Town Centre.

Increasing growth in e-commerce is also having a significant impact on employment growth and land demand related to the logistics sector. Companies such as Amazon have had an impact on the City's land usage, as it is the second largest employer in Brampton and is soon expected to occupy six buildings throughout the City. Delivery expectations within this sector are increasing on an annual basis. As delivery times decrease, it is anticipated that demand for regional fulfilment centres will increase. Further, it is estimated that 25% to 30% of online merchandise is returned which is also driving the need for reverse logistics and return centres.

In addition to e-commerce, automation of retail stores is anticipated to have an impact on the function of “bricks and mortar” retail store, blurring the lines between warehousing and retail. Retailers are utilizing technology used in warehousing to improve profitability, including using

Figure 8: Walmart Automated Retail Store, Sherman, Texas. Similar operation planned for select locations in Canada.
Image Source: Multi-Channel Merchant News

⁹ Based on Statistics Canada, Retail Trade Sales by Province, CANSIM 080-0020 and Statistics Canada Daily News on Retail Trade, December 2019 and December 2020.

¹⁰ Goods-based retailer refers to retail facilities that sell goods to be used or consumed at home, including food-oriented retail (supermarkets and convenience stores), beer, wine and liquor stores, pharmacies and personal care stores, home improvement stores and stores selling general merchandise, apparel and furniture.

¹¹ Service-based retailer refers to retail establishments that primarily provide an on-site service or where goods are consumed on-site, including food services (e.g., restaurants and bars), personal care services (e.g., hair salon), commercial recreational uses (e.g., fitness centres and movie theatres) and automotive services.

robotics to track inventory and automating transactions. The key objectives of increasing automation in retail settings are to increase profitability of the retail and convenience for customers. Convenience is typically tied to the dominant mode of traffic to the store and is focused on reducing the time a customer spends at the store. Wal-Mart Canada for example, recently renovated an existing Scarborough store¹² with a 22,000 sq. ft. (2,000 sq. m.) fully automated fulfillment centre where customers drive up to automated kiosks that can serve more than 5 customers at a time, as illustrated in Figure 8.



3.2 City of Brampton Employment Forecast to 2051

The Region of Peel is expected to experience strong employment growth between 2021 to 2051. The 2019 Growth Plan (Schedule 3) has forecast Peel Region's total employment base to grow to approximately 1,070,500 by 2051. This represents an increase of approximately 355,100 employees between 2021 and 2051 and an annual growth rate of 1.3%.¹³

Key Terms

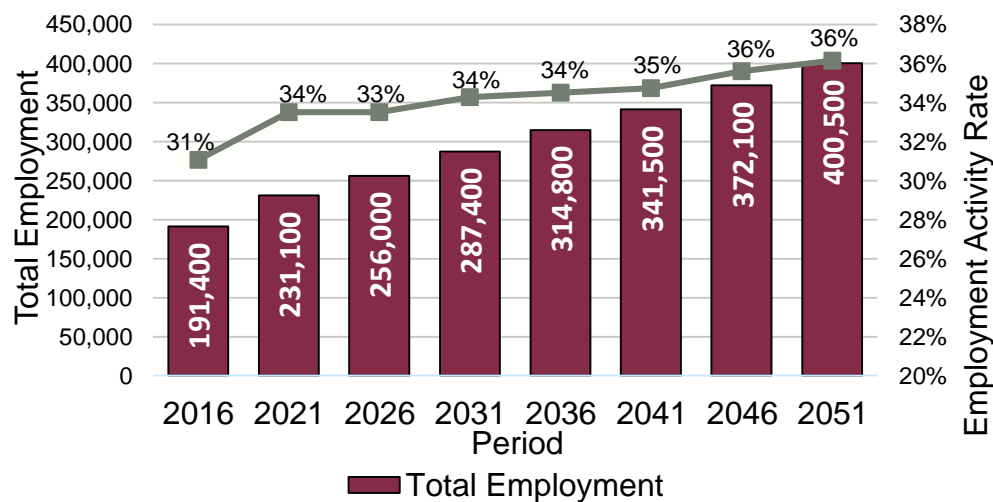
Employment Activity Rate //
is the ratio of population to

As part of the City of Brampton's Official Plan Review, the City has been testing options for growth scenarios. As a part of this exercise, the Region of Peel forecast allocation for the City of Brampton has been reviewed and an additional forecast, referred to as the Preferred Forecast Scenario, has been prepared as per the 2040+ Vision and is pending formal endorsement from City Council. The Preferred Scenario assumes a higher rate of employment growth compared to the Region of Peel Forecast Scenario (difference of 45,500 employees by 2051). The high rate of growth under the Preferred Scenario is based on an updated City Structure that embraces "complete communities" principles, including providing a range of job options that reduces reliance on commuting outside the City. It is important to emphasize that the population and employment forecasts outlined in Schedule 3 of the Growth Plan are minimum targets, and that the City can plan for further growth than required.

Figure 9 provides a summary of the Preferred Scenario employment growth forecast to 2051. By 2051 it is forecast that the City will reach an employment base of 400,500, an increase of 164,900 employees over the 2021 to 2051 period, or annual growth rate of 1.8%. Over the forecast horizon, it is anticipated that the employment activity rate will increase from 34% in 2021 to 36% in 2051. Generally, an increase in an employment activity rate, indicates that employment is increasing at a faster pace than population.

¹² 1900 Eglinton Avenue, Scarborough. Walmart is retrofitting the existing store to include an automated warehousing space for customer pick-ups.

¹³ Based on the Region of Peel Municipal Comprehensive Review, 2041+ Forecasts, January 2021.



Source: Watson & Associates Economists Ltd.

Figure 9: City of Brampton, Employment Forecast to 2051 (Preferred Scenario)

3.3 Employment Areas

Employment Areas are defined in the City of Brampton Official Plan as clusters of business and economic activities including, but not limited to, manufacturing, warehousing, offices, and associated retail and ancillary facilities.

3.3.1 What are Employment Areas?

Typically, Employment Areas accommodate employment lands employment (employment in industrial-type buildings) or export-based activities (i.e., Goods Producing or Goods Movement) that cannot be accommodated elsewhere in the City due to the need for buffering from other uses. These Employment Areas are to be protected from sensitive uses that have a low degree of compatibility, such as residential, schools and major retail uses

The City of Brampton Employment Areas are primarily comprised of industrial uses and are intended to be developed for light, heavy and prestige industrial uses, office, employment supportive uses (uses that provide commercial services to support the function of the employment area), and related uses. Prestige employment uses and employment supportive uses (such as office and commercial services), are generally situated on the exterior of the Employment Area with access to transit. These Prestige Employment Areas are well-suited to accommodate knowledge-based buildings, such as research and lab spaces. Prestige employment uses also function as a transition between Employment Areas and other areas of the City.

Employment Areas are comprised of the following designations in the City of Brampton Official Plan:

- Industrial;
- Office; and
- Business Corridor.

3.3.2 City of Brampton Employment Areas

The City has a continually growing employment base, with over 74,000 business operating in Brampton by 2019. The City of Brampton contains over 120 million square feet of industrial/commercial building space strategically located in the Greater Toronto Area.¹⁴ A significant amount of this industrial/commercial building space is accommodated within the City's Employment Areas. Figure 12 provides a map of the location of the City's Employment Areas. Employment Areas accommodate approximately 58% of the City's employment, including accommodating a large portion of the City's large employers. Manufacturing is the largest sector accommodated within Employment Areas, representing 35% of the jobs in Employment Areas, followed by the Transportation & Warehousing/Wholesale Trade sectors comprising a quarter of the employment. The remaining 40% of the employment comprise a range of employment sectors primarily accommodated in small industrial buildings, multi-tenant industrial buildings, office buildings and commercial service buildings.¹⁵ Rogers Communications corporate campus is the largest non-industrial employer in the City's Employment Areas which accommodates nearly 5,000 employees.¹⁶

Key Terms

Employment Areas // is an area with a cluster of business and economic activities protected from sensitive uses, such as a residential and major retail.

Employment Lands Employment// means employment in industrial-type buildings. Typically, accommodated in Employment Areas.

Employment Supportive Uses // commercial uses that are an amenity to the Employment Areas and support the function of the Employment Areas.



Figure 10: Office Uses located along the exterior of an Employment Area. Bramwest Employment Area, Brampton.

¹⁴ Brampton Business Park Guide. InvestBrampton.ca.

¹⁵ City of Brampton Employment Survey, 2018 data.

¹⁶ City of Brampton Employment Survey, 2018 data.



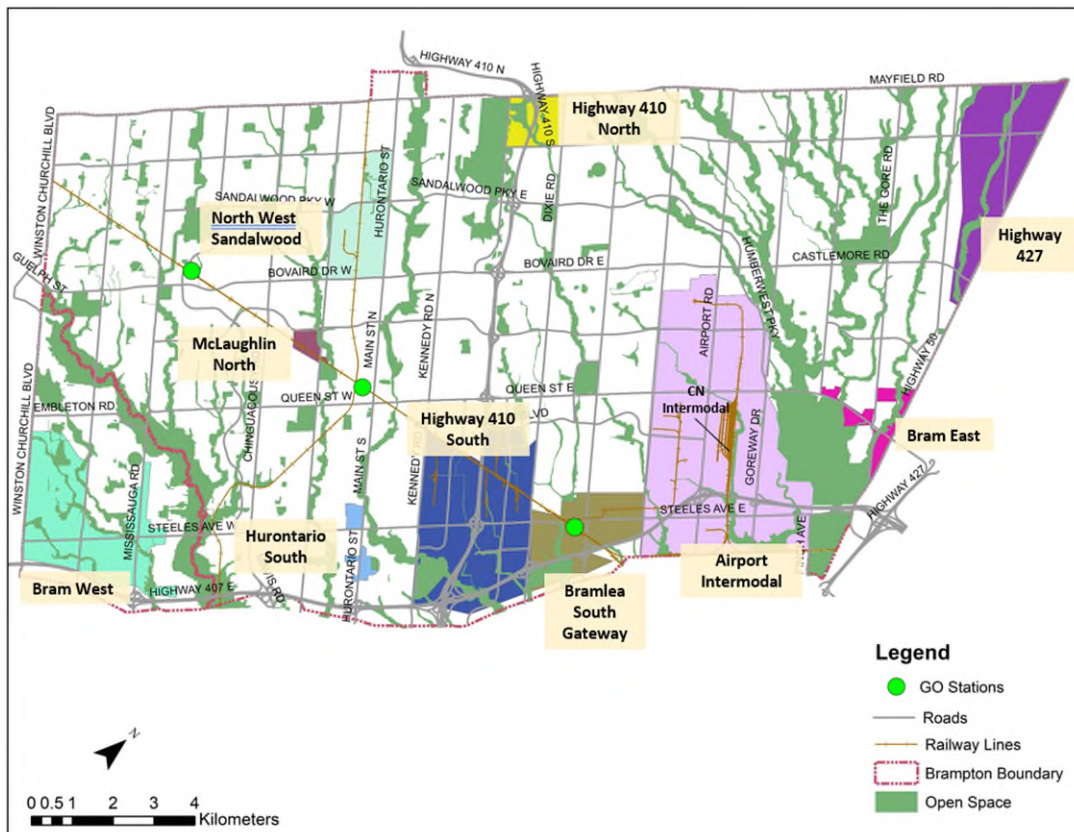
As illustrated in Figure 12, Brampton contains nine Employment Areas which account for approximately 4,800 total ha (11,860 total acres) of designated Employment Area land. Of this total, 18% (850 gross ha/2,100 gross acres) remain vacant as of May 2021.¹⁷

Many of the City's Employment Areas are already in a mature state and have minimal vacant land available for development. The Highway 427 Business Park contains the largest amount of vacant employment land within the City, with 375 ha (927 acres) available for development as of 2020. The remaining vacant designated employment land is dispersed and located throughout the City's other Employment Areas.

Employment Areas within the City of Brampton benefit from good connectivity to major infrastructure (highways, railways and intermodals), as illustrated in Figure 13. The City offers bus services to each Employment Area and the City's three GO Transit Stations are also located in proximity to these Employment Areas, which add to their appeal in supporting employment growth.



Figure 11: Rogers Communications Corporate Campus, a 25-ha (62 acre) site is one of Brampton's largest non-industrial employers in an Employment Area.



¹⁷ Region of Peel, Peel2041+ Vacant and Underutilized Inventory, May 2021 Draft. <https://pub-peelregion.escribemeetings.com/filestream.ashx?DocumentId=14734>

Source: Watson & Associates Economists Ltd., based on City of Brampton GIS data.

Figure 12: City of Brampton, Designated Employment Areas

3.3.3 Why Employment Areas are Important?

Employment Areas form a vital component of the City of Brampton's land-use structure and are an integral part of the local economic development potential of the economic region. As previously discussed, they are also home to many of the City's largest private-sector employers. Through development of its industrial land base, the City is better positioned to build more balanced, complete and competitive communities. Development typically accommodated on employment lands also generates relatively strong economic spin-off effects that benefit the City of Brampton directly and indirectly. In addition, employment lands development typically generates high-quality employment opportunities which can improve local socio-economic conditions (i.e. live/work opportunities). Furthermore, achieving non-residential growth adds to the City's assessment base, which can help support competitive property taxes and stronger municipal service levels. Thus, a healthy balance between residential and non-residential development is considered an important policy objective for the City of Brampton. In contrast to other urban land uses (e.g. commercial and mixed-use areas), employment lands provide the opportunity to accommodate industrial employment sectors that cannot be easily accommodated in other areas of the City.

3.3.4 Planning for the Changing Nature of Employment Areas

As previously mentioned, structural changes in the broader economy are altering the nature of economic activities on employment lands and impacting the built form and character of these lands. It is also important to recognize that tomorrow's industries have siting, space and built-form requirements that are fundamentally different from traditional industrial sites that exist today. This may include requirements related to broadband infrastructure, transit access, energy efficiency, building and urban design standards, eco-industrial design principles and labour force access.

Site configuration and integration of uses is also evolving particularly in prestige Employment Areas that often integrate operations combining office, research and development, warehousing and logistics, and on-site manufacturing in a "campus-style" setting.

With an increasing emphasis on "knowledge-based sectors," major office, flex office and multi-purpose facilities encompassing office and non-office uses are becoming an increasingly dominant built form. Recognizing these recent structural changes in the regional economy, there has been a shift in planning philosophy that calls for developing Employment Areas to provide for a wider range of amenities and employment-supportive uses that complement both knowledge-based and traditional industrial sectors. A key challenge for the City will be to plan for Employment Areas that strike a balance between embracing structural changes in the economy and protect the existing Employment Area base that accommodates a diverse range of industries, including manufacturing and other light, general and heavy industrial uses.

Key Terms

Knowledge-based Sectors // includes a range of sectors with a primarily focus on professional services, research and development, science, technology and innovation.



3.4 Principles for Approaching the Evaluation of Employment Conversions

When considering the City's competitive ranking within the GTHA, a major factor influencing the future competitiveness of Brampton's economic base is the structure and quality of its Employment Areas. Thus, a healthy balance between residential and non-residential development is considered an important policy objective for the City of Brampton. Through development of its Employment Area land base, the City is better positioned to build more balanced, complete and competitive communities.

Long-term employment growth within the City's Employment Areas is anticipated to be driven by demand from a broad range of established and emerging sectors. As the City's vacant employment land inventory is steadily developed, its finite employment land supply cannot be further expanded given the City's fixed urban boundary. This emphasizes the need to comprehensively assess the City's long-term employment land needs in an integrated and strategic manner, contemplating the long-term implications of a conversion away from true employment uses to residential or commercial uses which provide fewer stable jobs (i.e. retail). This also emphasizes the need for the City to explore employment intensification opportunities to accommodate future non-residential growth where strategically appropriate and adjacent to transit.

Specific policies relevant to the conversion and protection of Employment Areas can be found in the PPS and Growth Plan. The conversion of Employment Areas to Non-Employment Areas may occur through a Regional or single-tier municipal comprehensive review, only where it has been demonstrated that the land is not required for employment purposes over the long term and that there is a need for the conversion (PPS, s.1.3.2.4). The protection of employment lands from potential conversion only applies if the City has OP policies in place dealing with employment land conversions. The policies also allow Brampton to protect employment lands beyond 25 years provided the lands are not designated beyond the planning horizon identified in policy 1.1.2. (PPS, s. 1.3.2.7).

Section 5.6.2.8 of the Region of Peel OP (Consolidated December 2018) currently outlines the criteria for the conversion of lands within Employment Areas to non-employment uses.¹⁸ The draft Peel 2041+ employment and conversion policies have also emphasized the need to preserve land use designations within Employment Areas while maintaining flexibility for non employment uses in strategic areas where specific criteria are met. A conversion can only be achieved through a MCR if the criteria in Section 5.6.2.8 of the OP have been met. Given the importance of planning for and protecting Employment Areas, the following principles are meant to provide further rationale to the employment conversion criteria. These principles were developed using policy directions and guidance from the PPS, 2020, the Growth Plan (2019), and referring to best practices of protecting, planning, and developing designated Employment Areas. They were also developed recognizing the evolving nature of Employment Areas with respect to land use plans, market, and context:

¹⁸ Section 4.4.1.7. of the City of Brampton Official Plan outlines criteria for the conversion of lands designated Business Corridor, Industrial, or Major Office to a non-employment use. These criteria align with Section 5.6.2.8. of the Region of Peel Official Plan, excluding items vi and vii.



- i) Protect Employment Areas in proximity to major transportation corridors and goods movement infrastructure to ensure businesses have access to a transportation network that safely and efficiently moves goods and services;
- ii) Maintain the configuration, location, and contiguous nature of Employment Areas in order to prevent fragmentation and provide business supportive environments;
- iii) Provide a variety of Employment Area lands in order to improve market supply potential and Regional attractiveness to a variety of employment sectors and business sizes;
- iv) Maintain or improve the employment function and job potential of Employment Areas;
- v) Support efforts of transformative change through higher-density mixed-use development in Major Transit Station Areas if it can be demonstrated that the employment and job potential of Employment Areas can be retained or improved;
- vi) Align with municipal interests and policies related to Employment Areas;
- vii) Limit and/or mitigate land use incompatibilities where necessary; and
- viii) Consider the Provincial interests and guidance regarding Provincially Significant Employment Zones.

Designating new Employment Areas in a municipality becomes challenging without adequate consideration for the requirements that support their success. For this reason, it becomes increasingly important to protect existing Employment Areas because they provide the opportunity to accommodate employment uses that cannot be easily accommodated in other areas of the City. Working with the Region of Peel, the City should develop a set of localized criteria which can be used to assess the impacts of potential conversions within the context of the provincial framework and local planning and economic development objectives.

3.5 Major Office Market

Major Office buildings accommodate 10% of the employment within the City of Brampton.¹⁹ Major Office buildings are concentrated in Office Nodes (as illustrated in Figure 13), as well as within the Urban Growth Centre. The four Office Nodes identified in Figure 13 are also identified as Employment Areas in the City of Brampton Official Plan - office development is also permitted outside of these nodes. The Bramalea South Gateway Office Node has access to high-order transit (GO Transit). Three Hurontario LRT Stations are planned near the South Fletchers Office Node.

¹⁹ Based on City of Brampton Employment Survey, 2018.

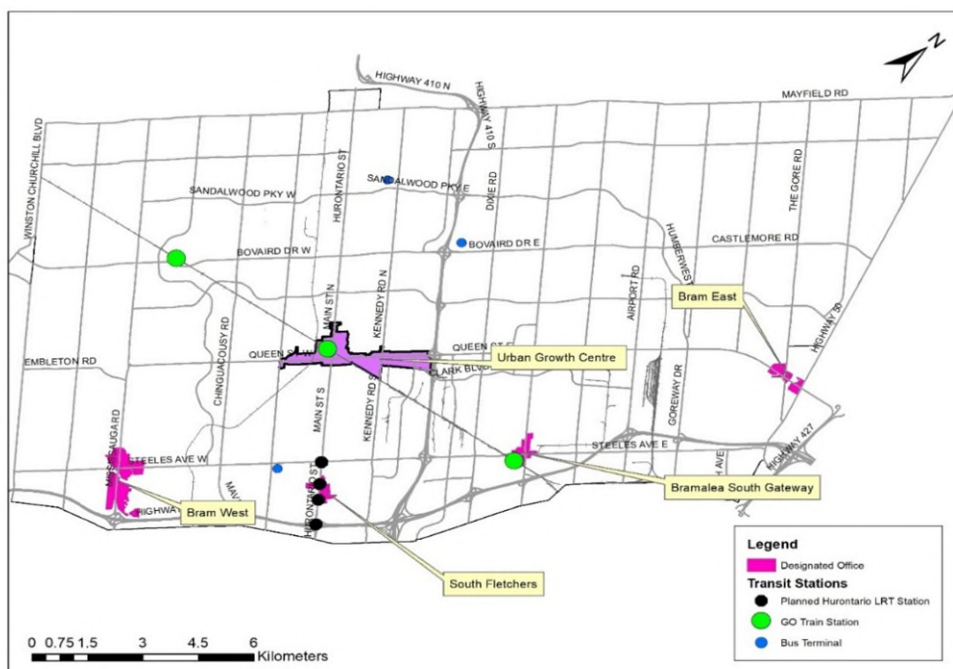


3.5.1 Major Office Market in Brampton

The City of Brampton has 16 major office buildings with 1.7 million sq. ft. (440,000 sq. m) of office building space. Relative to population size, the City of Brampton has a low share of office space compared to other municipalities in the GTHA, including the City of Mississauga, City of Markham, City of Vaughan and Town of Oakville. Within the Region of Peel, Brampton represents 12% of the office floor space, with the City of Mississauga representing the remaining share at 88%.²⁰

Key Terms

Major Office // office buildings with a gross floor area of 20,000 sq. ft. or 1,900 sq. m or larger.



Source: Watson & Associates Economists Ltd., based on City of Brampton GIS data.

Figure 13: City of Brampton, Office Nodes

3.5.2 Planning for a Competitive Major Office Market

Historically, the vast majority of suburban office development has been accommodated within Employment Areas; however, market prospects for conventional standalone suburban office development within Employment Areas is gradually diminishing, as demand shifts to more urban environments, such as downtown Toronto and other major Office Nodes. Demand for office space within Employment Areas is increasingly single-tenant and integrated with multi-purpose facilities (e.g. R&D, training centres, wholesale trade) often in campus-type settings. The Husky Injection Molding Systems Campus in Caledon is an example of a multi-purpose site with office, warehousing, manufacturing and ancillary daycare facility (for employees) all integrated on one

²⁰ Based on real estate reports from national real estate brokerage firms.

site. Further, there are growing opportunities for office development within innovation districts located on employment lands that have direct synergies with knowledge-based clusters and educational infrastructure.

The City of Brampton's office market is largely comprised of office sites located within greenfield settings that are typically automobile focused with respect to their access and connectivity to surrounding employment supportive uses. This office setting contrasts with the current structural changes occurring within the GTHA office market. As previously discussed, the GTHA office market is in a period of transition and structural change with an increasing demand for locations which offer access to high-order transit, a mixed-use environment potential for live/work opportunities, and access/proximity to amenities and services. Urban mixed-use environments are becoming increasingly desirable locations for office-related businesses. This, combined with diminishing greenfield opportunities for office development within Employment Areas in Brampton, and provincial and regional policy initiatives to locate major office development increasingly within strategic growth areas (SGAs), largely within the built boundary, offers strong opportunities for this type of office development within the City's intensification areas.

The office market in Brampton is largely occupied by single-tenants or the headquarters of large companies. Only a small portion of the City's employment in Professional, Scientific and Technical Services and Finance, Insurance and Real Estate which are typically small and medium-sized businesses are accommodated in major office buildings (11% and 8% respectively).²¹ The City will need to appeal to a wider range of sectors and business sizes to attract more major office development, including targeting employment in Professional, Scientific and Technical Services; Finance, Insurance and Real Estate and other knowledge-based sectors.

Key Terms

Strategic Growth Areas // Within settlement areas, nodes, corridors, and other areas that have been identified by municipalities or the Province to be the focus for accommodating intensification and higher-density mixed uses in a more compact built form.

The City of Brampton is building a strong foundation to support major office development through the development of its partnerships with post-secondary institutions and the development of an Innovation District. The City should leverage these efforts to support office development and will need to ensure that the City is planning for an urban structure that supports an urban environment with the amenities employees and employers are seeking.²² The City's office base represents a relatively small component of the broader GTHA market and is spread over four nodes, plus the UGC. While these office nodes are spread out geographically, there is little distinction between the four nodes outside of the Urban Growth Centre (i.e., no significant distinction in the industry clusters of the office settings). There is a need for the City to consider aligning focusing office market growth to areas that offer existing or planned high-order transit opportunities, such as the City's MTSAs.

²¹ Based on the City of Brampton Employment Survey, 2018.

²² Refer to the Growth Management Discussion Paper for additional details regarding the City's urban structure.



3.6 Retail Commercial Structure

The retail sector is comprised of a range of businesses that offer services and goods to customers locally and regionally in a “bricks and mortar” location. The retail sector in Brampton represents just under a third of the City’s employment (approximately 27%).²³ The City’s retail sector is oriented along arterial roads and the location characteristics of these retail nodes make them highly accessible to the City’s population base by automobile. Furthermore, many of these major retail locations are also in proximity to transit stations. The City’s existing retail network was developed based on a reliance on auto-oriented travel of its consumers.²⁴

3.6.1 Retail Market in Brampton

The retail structure is comprised a retail hierarchy that encourages the clustering of retail uses into centres with a range of sizes, which are dispersed throughout the City based on their drawing power and permitted uses. The following are the key components of the retail hierarchy:

- Regional Retail sites are large-scale multi-use, multi-purpose centres generally in excess of 46,500 sq. m (495,000 sq. ft.) gross leasable area;
- District Retail is multi-use, multi-purpose developments ranging in size from 11,620 to 46,500 sq. m (125,000 to 495,000 sq. ft.) gross leasable area;
- Neighbourhood Retail ranges in size from 3,700 to 11,620 sq. m (40,000 to 125,000 sq. ft.), and
- Convenience Retail that cannot exceed 3,700 sq. m (40,000 sq. ft.).

The City’s current OP policy framework for retail uses is a blend of both the more recent centres and corridors policy approach that focuses on mixed-use development to support active transportation and transit, and the more traditional segregated land use formats, which often result in single purpose, auto-oriented retail centres. These two frameworks should be reconciled to better achieve the City’s vision of the sustainable City concept that achieves a holistic balance by integrating economic, social, environmental, and cultural elements.²⁵

²³ City of Brampton Employment Survey, 2018.

²⁴ City of Brampton, Brampton Retail Policy Review - Phase 2 Report prepared by JC Williams and Macaulay Shiomi Howson Ltd., May 2017.

²⁵ City of Brampton, Brampton Retail Policy Review - Phase 2 Report prepared by JC Williams and Macaulay Shiomi Howson Ltd., May 2017.



3.6.2 Planning Considerations for an Evolving Retail Market

A large portion of the retail base in Brampton was developed during the national building wave of large-format retail uses in the 1980s through to the early 2000s. During this period, large-format retail growth included the development of “category-killers,” retailers specializing in a merchandising category (e.g., Staples, Home Depot, Best Buy, Chapters, Michael’s and Toys R’Us) and large format discounters (e.g., Wal-Mart, Costco, Zellers and Canadian Tire). Given the availability of greenfield lands, a growing population and accessibility to highways, Brampton became an attractive commercial market during this period.

Since the early 2000s, retail growth in Brampton, similar to the rest of the GTHA, has primarily focused on infilling of existing retail sites through “baby-box” retail pads (smaller retailers with a similar building design to big-box retailers) in power centres, expansions of regional shopping centres and retail growth oriented towards serving the local needs of a neighbourhood. National and local retail trends suggest that retail growth will continue efforts on infilling of existing retail sites with an emphasis on retail uses focused on local serving uses (e.g., food store, pharmacy), experiences (e.g., food services, escape rooms and bars), services (e.g., tutoring centres, dry cleaning, daycare, hair salon and medical/dental offices) and “bargain hunting” retail destinations with no e-commerce platforms (e.g., Dollarama, HomeSense and Winners). These retail uses tend to have a smaller retail footprint ranging from 1,500 sq. ft. (140 sq. m) to up to 40,000 sq. ft.(3,700 sq. m.) which provides more flexibility in accommodating mixed-use or intensification environments.

The anticipated population growth of Brampton will continue to drive demand for new local-serving retail, as consumers do not want to travel far to buy these products. As new residential developments are built, local serving retail will follow closely. Accommodating local serving retail uses that contribute towards building walkable communities should be a key objective in planning for intensification as well as greenfield areas. Other retail uses that are more regional serving (e.g., general merchandise, apparel, furniture and electronics) are more likely to be drawn to auto-oriented areas due to the large trade area requirements to support store sales.

As previously discussed, e-commerce and automation of retail stores is anticipated to have an impact on the function of “bricks and mortar” retail store, blurring the lines between warehousing and retail. Planning for retail uses will require a need to focus not only on the type of use, but a review of any secondary functions such as warehousing.



Figure 14: Recently built plaza that represents recent trends in retail, Lionhead Marketplace, Brampton.



Figure 15: Mixed-Use - Commercial and Residential. An example of the mixed-use opportunities with low-rise developments, Sky Harbour Dr., Brampton.

4 POLICY RECOMMENDATIONS AND STRATEGIC DIRECTIONS

Brampton is expected to make significant policy changes to shape the City as it continues to develop. Building on the contents presented in this Discussion Paper, i.e. proposed City Structure, and Employment Area, Retail and Office considerations, a series of employment strategic directions have been proposed. Each strategic direction is associated with how policy recommendations will be crafted in the next stage of the City's Official Plan Review process, subject to further community consultation.

1

Plan to reduce out-commuting and encourage more live/work opportunities:

- Consider policy enhancements to strengthen the City's ability to accommodate employment uses/sectors associated with structural changes in an evolving economy.
- Ensure OP policies that work together with Council's economic development initiatives to support the City's overall economic competitiveness and growth objectives.

2

Plan employment growth in concert with transit investments.

- Explore opportunities to increase employment through intensification on employment land and commercial sites.
- Protect Employment Areas to ensure the diversity of the City's Employment Base.
- Ensure policies are sufficient to protect and retain existing employment uses that are only permitted in Employment Areas.



- Develop a local conversion policy framework that builds on the Region policy framework and assists with the Region's review of potential conversions.

3

Plan for a Competitive Office Market:

- Prioritize planning efforts for major office around areas with existing or planned high-order transit.
- Leverage key innovation and education synergies by providing connectivity to major office nodes.

4

Update the Commercial Policy framework to facilitate complete communities supported by alternative modes of transportation:

- Create a mixed-use (commercial-residential) hierarchy that is aligned to a centres and corridors policy approach and based on densities.
- Remove retail size thresholds and provide direction related to form and design.
- Facilitate gradual intensification of existing commercial sites by permitting non-retail uses, including office and residential uses that contribute towards density while avoiding new land requirements.
- Designate new sites consistent with the above noted mixed-use compatibility hierarchy.



5 NEXT STEPS

This Discussion Paper is one of seven Papers that are being completed as part of Phase 4 of the Brampton Plan project. The seven Discussion Papers align with the key focus areas of Brampton Plan and build on the work completed in Phases 1-3 to establish a foundation from which to develop policy directions. The focus areas have been informed by the work completed through the 2040 Vision, policy review and research and through consultation with city staff. The directions and recommendations presented in Section 4 of this paper will be refined through subsequent consultation with the public.

This is a starting point for generating discussion about Employment and Retail related issues and recommendations. A Policy Directions Report will follow and will outline detailed changes proposed for inclusion in Brampton Plan.

Discussion Papers pertaining to each of the Brampton Plan Focus Areas can be accessed online at the Brampton Plan Project Website: Brampton.ca/BramptonPlan.

Provide your Comments!

Comments and feedback on the Discussion Papers can be provided on the Brampton Plan Project Website or emailed to opreview@brampton.ca.

