

MEMORANDUM

To: Jeff Schelling, Office of the Provincial Land and Development Facilitator

From: Stefan Krzeczunowicz and Michael Skelly

Date: October 31, 2025

Re: Joint Land Needs Analysis and Study – Stage 3 Analysis Findings

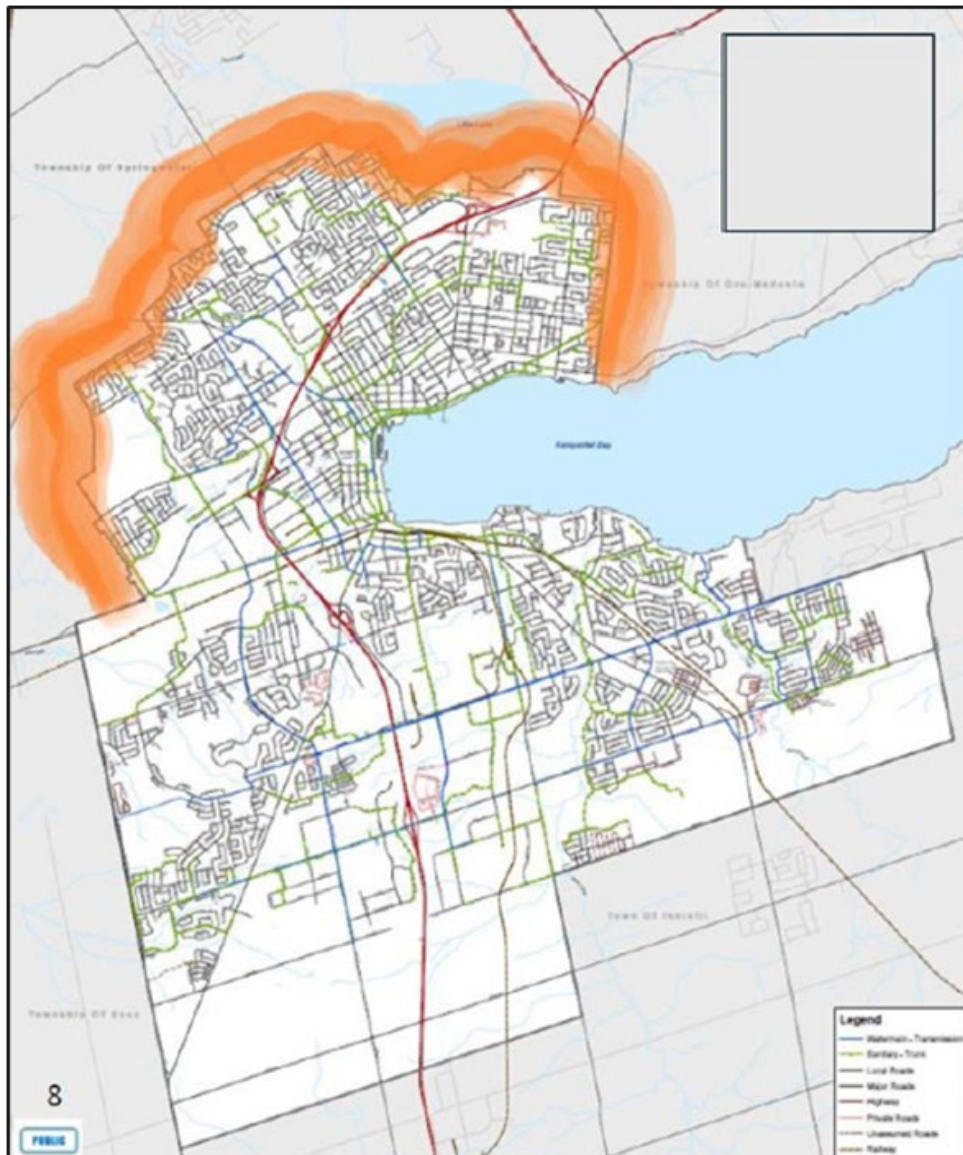
The City of Barrie, the Township of Oro-Medonte, the Township of Springwater, and the County of Simcoe have been engaged in facilitated discussions to develop mutually acceptable growth management solutions across their jurisdictions. To support this effort, the Minister of Municipal Affairs and Housing tasked the Office of the Provincial Land and Development Facilitator to assist with discussions and to ensure alignment with Provincial priorities, including the creation of housing and employment opportunities.

Technical analysis to support the above work commenced in mid-2024 through the Joint Land Needs Analysis and Study. The Study aims to address two key questions:

1. Do the City of Barrie and the Townships of Oro-Medonte and Springwater require additional Employment and/or Community Areas to accommodate growth to 2051?
2. If additional land is needed, what broad options are available within the Study Area to accommodate this growth?

The Study focuses on a defined Study Area along the boundary of the City of Barrie and the Townships of Oro-Medonte and Springwater (see Map 1 below).

Map 1 – Joint Land Needs Analysis Study Area



The work for the Joint Land Needs Analysis and Study has been completed in three stages.

- **Stage 1** focused on confirming the scope of work and finalizing the overall workplan in collaboration with the participating municipalities and the Provincial Land and Development Facilitator.
- **Stage 2** involved conducting a land needs assessment within the Study Area to evaluate the potential need for additional Employment Areas and/or Community Areas to accommodate forecast growth to 2051. A *Stage 2 Findings Report* was released in December 2024.

- **Stage 3**, launched in March 2025, focused on evaluating alternative options for accommodating growth within the Study Area. The analysis examined several key factors, including:
 - the suitability of different locations and configurations of land for development;
 - the delineation of undevelopable lands; and
 - the serviceability of lands (e.g. municipal water and wastewater, as well as transportation, electricity, and natural gas).

Stage 3 has been led by Hemson Consulting, with technical support from RV Anderson Associates, North-South Environmental, and Orland Conservation. This memorandum summarizes the planning analysis completed in Stage 3. Two companion memoranda provide supporting details on: servicing requirements and costs; and the delineation of undevelopable lands.¹

Given the integrated nature of the work completed in Stages 2 and 3, this memorandum should be read in conjunction with the two companion memoranda as well as the *Stage 2 Findings Report*. The latter report provides essential context on population and housing growth trends, regional market area dynamics, employment and local economic conditions, existing and planned land uses, and the available land supply within the Study Area.

i. Stage 3 Consultation Process

As with earlier stages, the Stage 3 work was highly collaborative, involving extensive consultation with elected officials and senior municipal staff specializing in planning, infrastructure, and economic development from the four participating municipalities. All meetings were chaired by the Office of the Provincial Land and Development Facilitator. Three Plenary Sessions—attended by up to 50 representatives from the participating municipalities—were held during Stage 3 on June 23, September 16, and October 21, 2025. Each session provided an opportunity to present updates on the technical background work and obtain feedback to inform subsequent phases of study.

Following the June Plenary, the Stage 3 consultation advanced along two parallel tracks:

¹ RV Anderson Associates, *Joint Lands Needs Analysis and Study – Stage 3. Engineering Analysis Technical Memorandum*, October 31, 2025; North South Environmental, *Barrie Joint Land Needs Study—Natural Heritage Constraints Assessment*, October 2025.

- Track 1 encompassed the consulting team’s work, which followed a pre-approved schedule, work plan, and scope. The results of this work form the basis of the technical memoranda released by the consulting team.
- Track 2 involved municipal negotiations, which took place bilaterally among the participating municipalities and were moderated by the Office of the Provincial Land and Development Facilitator. The consulting team did not participate directly in the Track 2 discussions.

ii. Stage 3 Disclaimer

The consulting team’s role throughout the Stage 3 process has been to conduct technical analysis to assist decision makers in the four participating municipalities in making informed, evidence-based decisions about how to manage growth within the Study Area. This work provides an analytical foundation and expert insight to support those decisions.

While considerations of municipal boundary adjustments naturally arise in this context, it is important to note that the three Stage 3 memoranda do *not* make any determinations regarding such changes. Although it offers recommendations on a potential new employment area within the Study Area and evaluates options for accommodating new Community Area lands in various locations, it draws no conclusions about whether any municipal boundary adjustments are necessary.

iii. Post-Stage 3 Work

The Stage 3 work does not include several tasks that are anticipated to follow in subsequent stages of the broader growth management exercise within the Study Area, including:

- conducting fieldwork around Little Lake to support recommendations for preserving its ecological integrity and other sensitive sites;
- evaluating potential agricultural impacts and minimum distance separation formulae associated with the designation of new urban lands within the Study Area (pursuant to Policy 2.3.2.1 of the *Provincial Planning Statement, 2024*);
- preparing secondary land use plans for newly designated urban lands; and
- assessing the short- and long-term financial impacts on municipal budgets and tax revenues.

B. KEY CONCLUSIONS ARISING FROM STAGE 2 WORK

The *Stage 2 Findings Report* concluded that any expansion of the City of Barrie's boundaries—if it is to occur—should address both Community Area and Employment Area land needs. Land needs were estimated anywhere between 390 to 930 developable hectares—265-630 hectares for Community Area and 125-300 hectares for Employment Area.

The Stage 3 work provides a clearer and more refined understanding of this land need. The updated estimate is slightly below the upper end of the range shown in the *Stage 2 Findings Report* (see below).

Stage 3 focuses on where within the Study Area the updated land needs could best be met. In assessing options for accommodating growth, the following foundational premises have been carried forward from the *Stage 2 Findings Report*:

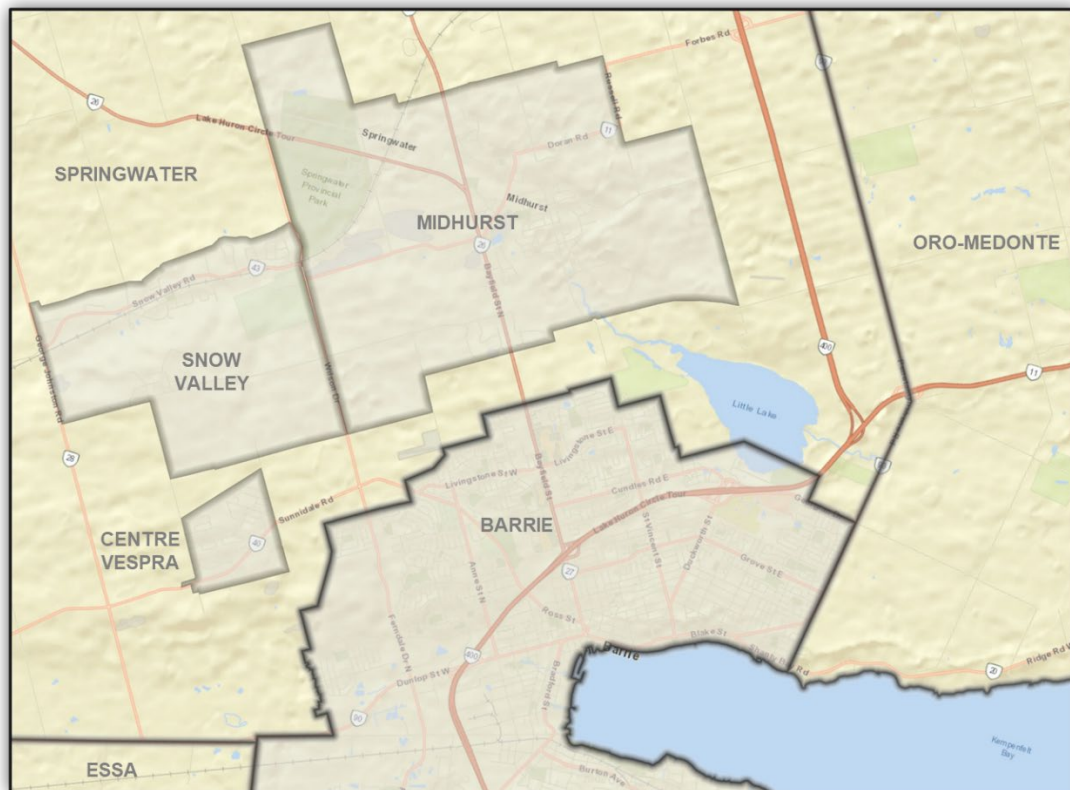
- First, the City of Barrie's Official Plan forecasts to 2051 for population and employment represent good planning, notwithstanding the current province-wide housing market slowdown. These forecasts anticipate very high growth for the City over the long-term. Historically, Barrie has been among the fastest-growing cities in Canada and remains well-positioned to continue that role. It serves as the regional centre for the Simcoe Census Division, with approximately one job for every two residents—a significantly higher activity rate than elsewhere in the Study Area.
- Second, without additional urban land, Barrie's planned growth will eventually slow—initially for housing and, by the mid-2040s or sooner, for employment lands. It is also unrealistic to assume that all new housing demand in Barrie can be met solely through apartment construction. Many households continue to prefer single detached, semi-detached, or townhouse housing forms. If these options are unavailable in Barrie, such households are unlikely to shift to apartments; instead, they will likely settle housing opportunities outside the City.
- Third, if Barrie's growth slows, the location of the resulting “spillover” growth is somewhat uncertain. While some of this growth may be absorbed within the Study Area, the broader regional housing market encompasses numerous other settlement areas, including primary settlement areas such as Alliston, Alcona, and Bradford to the south and even potentially Orillia, Wasaga Beach, Collingwood, and other smaller settlement areas.

i. Current Urban Areas in the Study Area

Understanding the existing urban structure surrounding the Study Area is essential to evaluating where future Community and Employment Area land needs may best be accommodated (see Map 2). The Study Area is influenced by several existing and planned urban areas of varying scale and function:

- **City of Barrie** – As the primary urban centre within the broader region, Barrie anchors the Study Area both economically and demographically. Its role as the regional hub for employment, services, and higher-density housing provides the context for much of the growth pressure examined through this study.
- **Midhurst Secondary Plan (MSP) Area** – Within the Study Area, the MSP area represents the only significant alternative location for planned urban and suburban development outside Barrie.
- **Centre Vespra and Snow Valley** – These two smaller settlement areas are not expected to play a meaningful role in accommodating additional growth. Centre Vespra is largely built out, while Snow Valley is designated for very low-density residential development associated with a ski hill. Although Snow Valley's settlement boundary covers a relatively large area, significant natural heritage constraints—including the Minesing Swamp and surrounding valleylands—limit its potential for further urban expansion.
- **Oro-Medonte Side of the Study Area** – There are no existing settlement areas within the portion of the Study Area located in Oro-Medonte. As such, this area does not present an opportunity for accommodating urban development within an existing settlement area.

Map 2 – Current Settlement Areas Within Study Area



C. EMPLOYMENT LAND ANALYSIS INDICATES NEED FOR ADDITIONAL EMPLOYMENT AREA LANDS

This section summarizes the results of the Stage 2 Employment Area land needs assessment and the Stage 3 employment analysis. Based on this work, a new Employment Area is recommended for designation along the Highway 400 corridor, extending north from the Highway 400–Highway 11 interchange. This area has strong potential to accommodate the long-term employment and economic development needs of Barrie, Springwater, and the County of Simcoe.

i. Stage 2 Findings Show Barrie Needs to Plan for New Employment Lands Before 2051

The Stage 2 work involved a review of Barrie’s Land Needs Assessment (LNA), as set out in three reports issued between 2019 and 2021 as part of the City’s Municipal Comprehensive Review (MCR). Hemson’s analysis concluded that while certain assumptions in Barrie’s LNA could be refined, any resulting increase in employment land need would be minor. Overall, the LNA’s methodology and findings were found to be reasonable and defensible.

However, several assumptions—particularly those relating to employment densities and market flexibility—suggested that the City’s employment land supply may be more constrained than it appears:

- The LNA assumed employment densities of 35 employees per hectare for new lands and 31 employees per hectare for existing vacant lands, compared to an observed 2018 density of 22 employees per hectare.
- The analysis also assumed moderately higher levels of intensification within existing Employment Areas and did not explicitly account for long-term vacancy and market choice.

Accordingly, the calculated Employment Area land need in Barrie likely represents the minimum required to accommodate growth to 2051. To ensure that its 2051 employment targets are achieved, the City should plan to identify and protect additional Employment Area lands prior to 2051.

Stage 2 also established the need for additional Community Area lands to meet Barrie’s 2051 residential forecast and concluded that any future municipal boundary expansion should address both Community and Employment Area needs. The preliminary estimate for additional Employment Area lands ranged between 125 and 300 hectares, based on the Stage 2 analysis.

ii. Employment Land Needs in Oro-Medonte, Springwater, and the County

The Township of Oro-Medonte’s designated Employment Areas—located along the Highway 11 corridor and around the Lake Simcoe Regional Airport—are sufficient to meet projected demand to 2051, as confirmed through both the County’s MCR and Stage 2 findings.

The Township of Springwater, by contrast, has a limited supply of designated Employment Areas, which are expected to be fully developed by 2051. Should development in the Midhurst Secondary Plan Area proceed more rapidly than anticipated, the Township’s activity rate (ratio of employment to population) could decline. To maintain a balanced community structure, Springwater may need to accelerate the designation of additional Employment Areas prior to 2051.

At the County level, the MCR identified a deficit of 203 hectares of Employment Area land within the County’s Northern Regional Market Area to 2051. To date, this need remains unaddressed.

Given the combined long-term Employment Area needs of Barrie, Springwater, and the County, a co-ordinated and strategic approach to Employment Area planning is recommended within the Study Area. Such an approach should leverage individual municipal needs to establish a regional significant Employment Area that supports shared economic growth objectives and provides long-term benefits for all participating municipalities.

The Highway 400 corridor—centrally located and strategically positioned between Barrie, Springwater, and Oro-Medonte—emerges as the most viable location to accommodate these coordinated Employment Area needs, as discussed in sections below.

iii. PPS 2024 Supports Planning for Employment Areas Beyond 2051

The PPS provides enhanced flexibility for municipalities to plan for long-term employment and infrastructure needs beyond the traditional 30-year planning horizon. Section 2.1.3 of the PPS states:

“At the time of creating a new official plan and each official plan update, sufficient land shall be made available to accommodate an appropriate range and mix of land uses to meet projected needs for a time horizon of at least 20 years, but not more than 30 years, informed by provincial guidance. Planning for infrastructure, public service facilities, strategic growth areas and employment areas may extend beyond this time horizon.”

This policy explicitly permits municipalities to plan for Employment Areas extending beyond 2051, ensuring that sufficient lands are identified to support long-term economic development, infrastructure coordination, and regional competitiveness.

In the context of the Joint Land Needs Study, this provision enables Barrie, Springwater, and the County of Simcoe to proactively identify and protect strategic Employment Areas—such as those along the Highway 400 corridor—that will meet not only forecast demand to 2051 but also position the region for continued growth and investment well into the second half of the century.

iv. Stage 3 Findings – Updated Employment Area Land Need Indicates Requirements for 300 hectares in Barrie

Stage 3 refined Barrie’s employment land need by accounting for constraints in available land supply before 2051 as well as the need to plan beyond the 2051 time horizon. The resulting analysis extends to 2061. The estimate of additional employment land demand to 2061 is shown below in Table 1.

It should be noted that policies in the new *Provincial Planning Statement, 2024* (PPS 2024), may reduce overall demand for employment lands by narrowing the definition of “Employment Areas” (excluding non-ancillary retail, office, and institutional uses). However, these same policy changes may also lower employment densities, as fewer office-oriented jobs are expected to locate within designated Employment Areas. Nevertheless, a 10% reduction in overall employment growth in Barrie has been assumed to account for the effects of this new policy framework.

Table 1: Estimated Employment Area Land Need for Barrie

Description	Jobs and Area
Forecast employment land employment growth 2021-2051	26,656 jobs
10% reduction to account for PPS, 2024 definition of Employment Areas which excludes non-associated and non-ancillary retail, office and institutional uses	23,990 jobs
Average annual growth	800 jobs
10 years of growth 2051-2061	8,000 jobs
Employment land density	30 employees per gross ha
Land need	267 ha
Plus 15% for long-term vacancy and market choice	307 ha
Rounded	300 ha

Source: Hemson Consulting

This 300-hectare estimate does not include:

- the existing Employment Area deficit of approximately 200 hectares identified for the Northern Regional Market Area in the County’s MCR; or
- longer-term Employment Area needs in Springwater, particularly to support the full build-out of the Midhurst Secondary Plan Area.

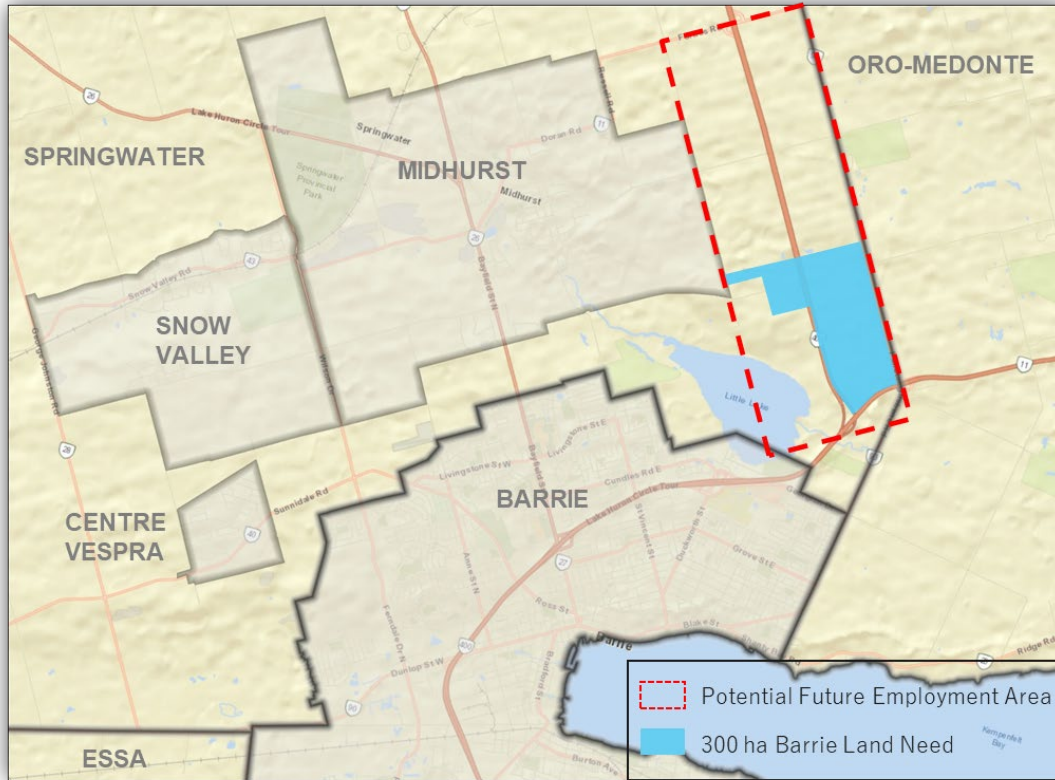
Accordingly, the 300-hectare estimate should be viewed as a conservative figure. In practice, Barrie’s need for additional Employment Area lands will likely emerge before 2051 as existing lands build out.

v. Highway 400 Corridor in Springwater Stands Out as the Preferred Location for a New Employment Area

Analysis of potential locations within the Study Area identified the Highway 400 corridor as the clear preferred location for new Employment Area lands. The recommended area extends along both sides of Highway 400, beginning north of the Highway 400–Highway 11

interchange. The estimated 300-hectare requirement can be accommodated within the area shown conceptually in Map 2.

Map 3 – Concept Map Showing Preferred Location for New Employment Lands



Source: Hemson Consulting

Considering both Barrie's needs and the broader County's employment land deficit, the new Employment Area could be expanded northward to Forbes Road (shown as a dotted red boundary in Map 2) to accommodate Simcoe County's Northern Regional Market Area needs and potential long-term requirements in Springwater.

vi. Highway 400 Corridor Achieves Key Site Selection Criteria

The land along Highway 400 satisfies most of the key criteria used to identify appropriate Employment Area locations:

- It is directly adjacent to Highways 400 and 11, providing good access to a major transportation corridor and also providing good visibility from the highway for those end users that require this site selection attribute.

- Topographically, the area is relatively flat and would allow for development as a business park. It is also relatively free of major environmental and existing infrastructure constraints.
- As it is a relatively large, contiguous area, it provides the potential to support land extensive users and employment clusters.
- It is separated from residential areas, thereby minimizing potential land use conflicts.
- Due to its location and proximity to 400 series highways, the area has good access to supply markets and labour.
- Also, due to its location near the northern part of Barrie, it can serve both rural and urban employment land needs.
- Although it has no direct rail links, it is relatively close to the Lake Simcoe Regional Airport—located to the east, along Highway 11.

A detailed assessment of the Highway 400 lands is provided in Table 2.

Table 2 – Assessment of Proposed Highway 400 Employment Area

Employment Area Site Selection Criteria	East of Highway 400	West of Highway 400
Advantages		
Direct highway access	Yes – especially with future interchange at Partridge Rd	Yes – especially with future interchange at Partridge Rd
Flat topography	Yes	Yes
Supports land-extensive users & employment clusters	Yes	Yes, but not to the same extent as East side
Easy to manage/avoid land use conflicts	Yes	Yes – with buffering for potential land trust lands
Access to supply chains & markets	Yes	Yes
Access to labour	Yes	Yes
Can serve rural businesses	Yes	Yes
Visibility from arterial roads	Yes	Yes
Access to rail lines/airport	No rail; 15-min drive to Simcoe Regional Airport	No rail; 15-min drive to Simcoe Regional Airport
Lack of physical features could inhibit development	Yes	Yes
Uncertainties		
Compliments nearby Employment Areas	Potentially Oro-Medonte to the east	Potentially Oro-Medonte to the east
Could attract target employment sectors	Uncertain	Uncertain
Disadvantages		
Close to other Employment Areas	No	No
Existing uses can be leveraged	No – one radio tower; active farms & farmhouses	No – 1 active farm & farmhouse

While the corridor represents a new Employment Area, and therefore cannot immediately leverage synergies with existing business parks (except for a small employment area in Oro-Medonte at Highway 11 and Penetanguishene Road), it nonetheless offers strategic advantages in terms of visibility, access, and scale. Servicing (water, wastewater, and road improvements) will be required, as discussed in the companion memorandum by R.V. Anderson Associates.

vii. New Employment Area along Highway 400 is Strategically Well-Located

From a Provincial perspective, opportunities to designate large, contiguous, strategically located Employment Areas are rare. The proposed Highway 400 Employment Area is particularly well-positioned within the broader Provincial growth and infrastructure context, at the confluence of major north–south corridors linking Northern Ontario’s resource regions and Southern Ontario’s manufacturing base. Between the Greater Toronto Area and the Ring of Fire, only Sudbury and North Bay serve comparable regional functions.

From a regional perspective, the proposed Employment Area can help:

- address the 203-hectare deficit in Employment Area supply within Simcoe County’s Northern Regional Market Area;
- provide a long-term employment base for Springwater, should Midhurst grow faster than forecast under the County Official Plan;
- complement designated Employment Areas along the Highway 400 corridor south of Barrie; and
- complement the designated Employment Areas in Oro-Medonte along Highway 11 and around the Lake Simcoe Regional Airport.

Together, these areas would form a cohesive regional employment corridor, supporting continued economic diversification and job creation across Barrie, Springwater, Oro-Medonte, and the broader County of Simcoe.

D. COMMUNITY AREA LAND NEED OPTIONS

This section assesses the need for additional Community Area lands to accommodate forecast growth within the Study Area. Community Area lands comprise residential uses as well as population-related employment associated with retail, education, and other institutional functions.

i. Updated Community Area Land Need Analysis Indicates Need for Approximately 500 hectares

Hemson's *Stage 2 Findings Report* identified a potential Community Area land need ranging between 265 and 630 developable hectares to accommodate forecasted housing growth in Barrie to 2051.

A subsequent, more detailed review of Barrie's residential land supply was undertaken, which indicated higher density within planned subdivisions. The updated analysis indicates an estimated Community Area land need of approximately 500 developable hectares, as shown in Table 3.

This revised estimate also incorporates a lowered intensification target for Barrie—from 50% to 45%—to better account for expected development around the Barrie South GO Station. Although this area lies technically within the Designated Greenfield Area (DGA), it functions effectively as an intensification area given its proximity to the City's Built-Up Area.

To provide an appropriate housing mix, an additional 8,900 units (rounded) are required, translating to a Community Area land need of approximately 468 hectares, rounded to 500 hectares.

Table 3: Barrie Community Area Land Need Assessment

Land Need Assessment Step			
Forecast Housing Units			
2021	55,300		
2051	119,000		
2021-2051	63,700		
Forecast Housing Units by Policy Area			
	BUA Units	DGA Units	Total Units
2021-2051	45%	55%	100%
2021-2051	28,665	35,035	63,700
Rounded to	28,700	35,000	63,700
Forecast DGA Housing Units by Type			
	Ground-Related	Apartments	Total
2021-2051	90%	10%	100%
2021-2051	31,500	3,500	35,000
Existing DGA Supply Potential as of May 2025			
	Ground-Related	Apartments	Total
Applications	15,065	8,611	23,676
Lands With No Application			
Neighbourhood Lands (19 uph)	4,954	550	5,504
Medium Density Lands (30 uph)	1,014	0	1,014
Community Hub Lands	0	672	672
No Application Sub-total	5,968	1,222	7,190
Total Existing DGA Supply Potential	21,033	9,833	30,866
Rounded to	21,000	9,800	30,800
Land Budget Balance by Unit Type			
Initial Land Budget Balance	Ground-Related	Apartments	Total
DGA Demand	31,500	3,500	35,000
DGA Supply Potential	21,000	9,800	30,800
Surplus / (Shortfall)	(10,500)	6,300	(4,200)
Supply Adjustment			
Apartment surplus		6,300 units	
Land Area (at 150 units per ha)		42 ha	
Converted to rows (at 60 units per ha)		2,500	
Adjusted DGA Supply	Ground-Related	Apartments	Total
Initial Supply	21,000	9,800	30,800
Adjustment	2,500	(6,300)	(3,800)
Adjusted Supply	23,500	3,500	27,000
Land Budget Balance (after Supply Adjustment)	Ground-Related	Apartments	Total
DGA Demand	31,500	3,500	35,000

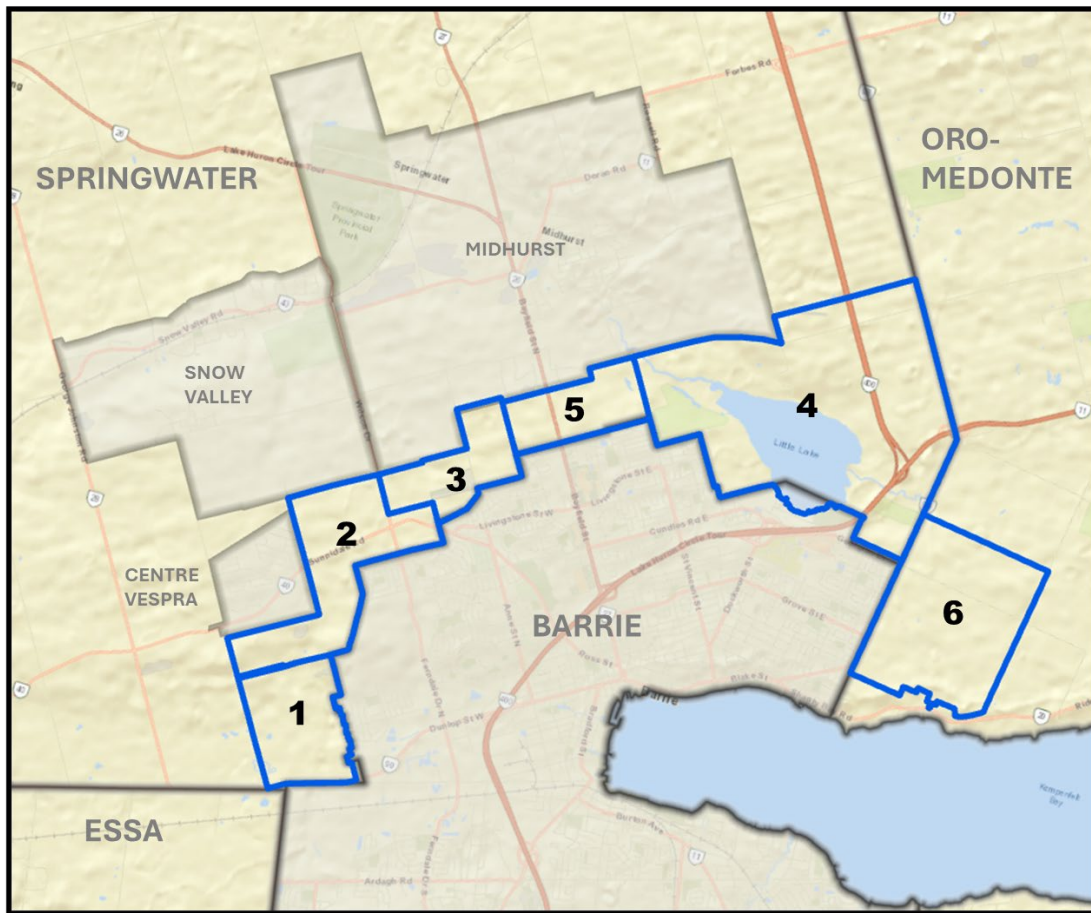
DGA Supply Potential	23,500	3,500	27,000
Surplus / (Shortfall)	(8,000)	0	(8,000)
Additional Land Requirement	Ground-Related	Apartments	Total
DGA Demand Shortfall	8,000	0	8,000
Planning for Appropriate Housing Mix	0	889	889
Additional Units Required	8,000	889	8,889
Rounded	8,000	900	8,900
Community Area Land Need (at 19 units per developable ha)			468.4 ha
Rounded			500 ha

Source: Hemson Consulting

ii. Options for Accommodating Future Lands for Housing in the Study Area

In contrast to future Employment Area lands, there are multiple potential options for accommodating future Community Area (housing) land needs within the Study Area. For the purpose of this analysis, the Study Area was divided into six development blocks, each representing a logical planning unit for assessing developable land, infrastructure potential, and environmental constraints (see Map 3).

Map 3 — Development Blocks Within the Study Area



Source: Hemson Consulting

The following summarizes the physical characteristics of each development block. A detailed delineation and mapping of the blocks is provided in the two companion memoranda that address infrastructure needs and costs and undevelopable lands. The latter identifies the extent of natural heritage features, topographic limitations, and other physical constraints affecting development potential. Photos of each development block, taken by the consultant team, are provided in the Appendix to this memorandum.

Block 1

Area: 255 ha **Developable:** 24 ha (9%)

Block 1 lies at the western edge of the Study Area and contains some existing employment uses along Highway 90. The area's steep topography and extensive environmental constraints render it largely unsuitable for large-scale development. Limited opportunities may exist for small-scale employment uses contiguous with existing industrial activity. However, due to its limited developable area, Block 1 was excluded from any detailed analysis at the direction of the participating municipalities at the June Plenary Session.

Block 2

Area: 382 ha **Developable:** 233 ha (61%)

Predominantly agricultural, Block 2 has gently elevated terrain and good access via existing north-south and east-west arterial roads. It is adjacent to established residential areas to the west and south and benefits from proximity to existing municipal servicing and public service facilities in Barrie. Agricultural impacts will need to be assessed through further study, but overall, the block presents strong potential for accommodating new urban uses.

Block 3

Area: 192 ha **Developable:** 179 ha (93%)

This block encompasses the Barrie Airpark (aerodrome) and a driving range within the Township of Springwater. The land is elevated and primarily agricultural. Existing services and community facilities are available to the south in Barrie, with Anne Street providing a north-south arterial connection. While the site offers considerable developable coverage, agricultural and potential natural heritage impacts will require further review.

Block 4

Area: 1,226 ha **Developable:** 326 ha (27%)

The largest block, Block 4, includes extensive Natural Heritage System (NHS) lands—approximately 825 hectares—along with agricultural uses, the Barrie Country Club, and Highway 400 rights-of-way. The developable lands, situated east and west of Highway 400 near Little Lake, are suitable for future employment area expansion given direct highway access and adjacency to existing urban services (see above).

Block 5

Area: 183 ha **Developable:** 77 ha (42%)

Block 5 features rolling topography that slopes eastward and contains both agricultural and NHS lands. It is bordered by residential uses to the north and south and fronts Bayfield Street, a major arterial roadway. Existing and planned water and wastewater servicing is located to the north and south, providing potentially feasible access for development. Agricultural impacts and the need for buffering between new and existing residential areas require further consideration.

Block 6

Area: 533 ha **Developable:** 277 ha (52%)

This large, centrally located block contains a mix of agricultural, rural, and limited employment uses, together with NHS features. It benefits from strong servicing availability and proximity to major public institutions such as Georgian College and Royal Victoria

Hospital, as well as direct Highway 400 access. The internal road network includes both north–south and east–west arterials. While the block offers significant development potential, agricultural impacts—particularly in the south-west—require further study.

Table 4 summarizes the estimated developable land area for the five blocks within the Study Area that were subject to detailed analysis of infrastructure needs and environmental constraints (i.e. excluding Block 1). Of the total 2,500 gross hectares, only about 1,100 hectares are considered developable. Approximately 1,300 hectares fall within the NHS and are subject to varying levels of environmental constraint.

Block 4 also contains roughly 75 hectares of other non-developable lands, including the Highway 400 right-of-way, highway commuter lot, Barrie Country Club and golf course, and the Sutton Heights subdivision.

It should be noted that these estimates do not include a potential “Community Buffer” identified by the Township of Springwater and the City of Barrie as a possible future feature (see below). NHS area estimates are preliminary and will require more detailed field studies to confirm the extent of constraints. Potential infrastructure land use conflicts may also arise and will need to be addressed in subsequent planning phases.

Table 4: Block by Block Summary for the Study Area

Block	Total Land Area (ha)	Non-Developable NHS Area (ha)	Other Non- Developable Areas (ha)	Developable Area (ha)
2	382	149	n/a	233
3	192	13	n/a	179
4	1,226	825	75	326
5	183	106	n/a	77
6	533	256	n/a	277
Total	2,516	1,349	75	1,092

Note: Other Non-Developable Areas in Block 4 consist of the Highway 400 right-of-way, the highway commuter lot, the Barrie Country club, and the Sutton Heights subdivision.

Source: Hemson Consulting and North-South Environmental

iii. Options for Accommodating Community Area Land Needs

While there is a single clear location for future Employment Area lands, there are multiple potential options for accommodating Community Area land needs within the Study Area.

Three scenarios have been developed to address the estimated 500 hectares of additional

Community Area land required to accommodate Barrie’s “spillover growth” (see Table 4 below).

Conceptual maps illustrating each scenario are provided in Maps 4-6 below. The maps highlight in yellow the location of the proposed Community Area lands under each scenario. The location of potential Employment Area lands remains fixed in all scenarios, as discussed in the preceding section.

As noted, more detailed, high-resolution maps showing the development blocks are provided in the two companion memoranda dealing with non-developable lands and infrastructure needs and costs.

Table 4: Scenarios for Accommodating Community Area Land Needs

Scenario	Location of Additional Community Area	Available Community Area (ha)
1 – All in Midhurst	Midhurst Secondary Plan Area	~250
2a – Barrie/Springwater (All Blocks)	Along Barrie/Springwater boundary: Block 5 annexed by Barrie	~500
2b – Barrie/Springwater (Block 5 remains in Springwater)	Along Barrie/Springwater boundary: Block 5 (Bayfield Corridor) retained in Springwater	~430
3 – Barrie/Oro-Medonte	Along Barrie/Oro-Medonte boundary	~280

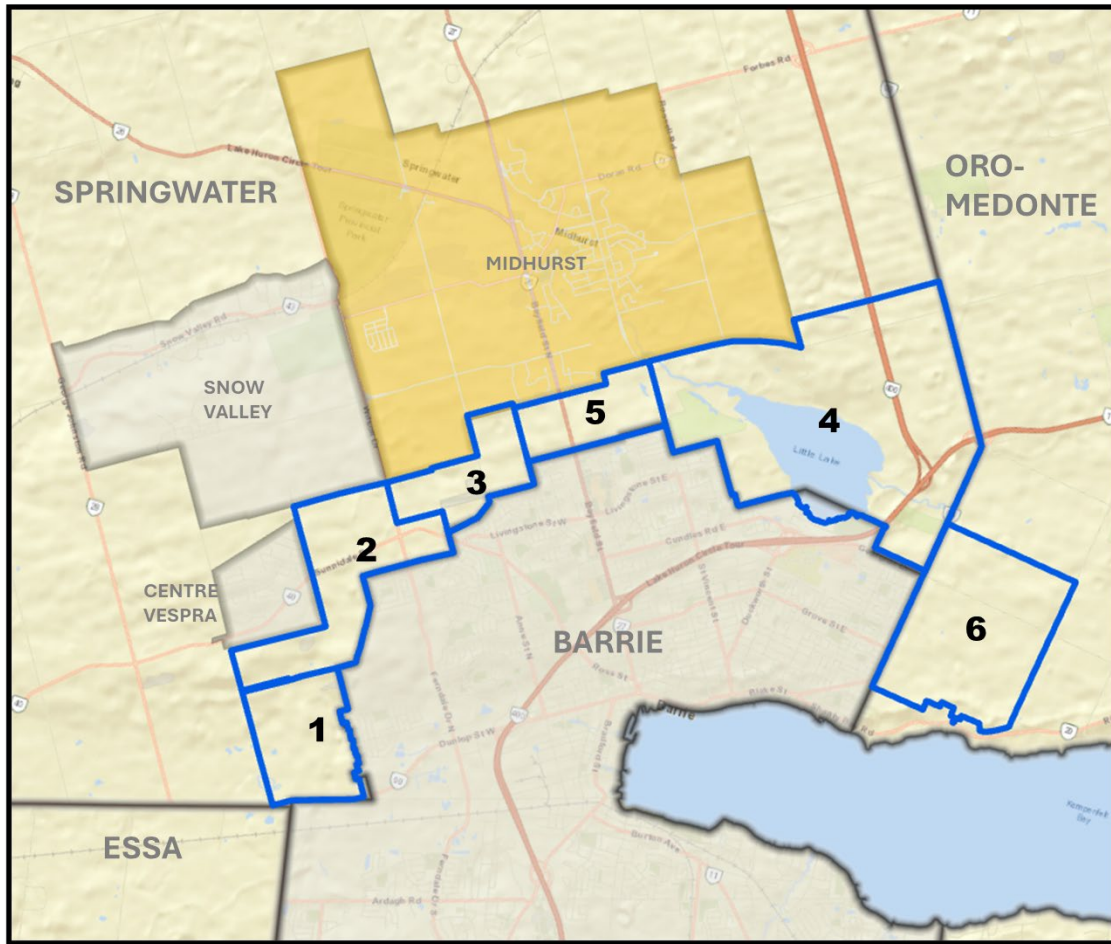
Source: Hemson Consulting

a) Scenario 1 – All Spillover Growth in Midhurst

Scenario 1 directs all Community Area spillover growth to the Midhurst Secondary Plan Area in Springwater, where approximately 250 hectares of land are potentially available for development beyond what is required to accommodate growth to 2051 under the County of Simcoe Official Plan. This represents roughly half of the 500 hectares needed to accommodate Barrie’s spillover growth (see Map 4). Accordingly, Scenario 1 would either require:

- an expansion of the Midhurst Secondary Plan Area, or
- a smaller land transfer (approximately 250 hectares) to Barrie for Community Area development.

Map 4 – Scenario 1 Concept Map



Source: Hemson Consulting

Consideration of this scenario raises important questions about Midhurst's capacity to absorb significant additional growth. Midhurst is, in effect, a new community, and recent Ontario experience in building new towns is limited. While new communities can grow rapidly once servicing is available—Milton in the Greater Toronto Area in the early 2000s being a notable example—Midhurst is situated almost immediately adjacent to Barrie, a large, well-established urban centre with:

- extensive regional infrastructure;
- two GO Transit stations;
- Georgian College;
- the Royal Victoria Regional Health Centre; and
- a broad range of commercial, institutional, and employment opportunities.

Although Midhurst will be well-serviced—through a comprehensive servicing strategy being advanced by the Township of Springwater and the Midhurst Landowners Group, including major water and wastewater expansions, a new fire station, an \$85-million community hub, and upgraded public works and road infrastructure—it remains distinct from Barrie in its scale, urban character, and regional function.

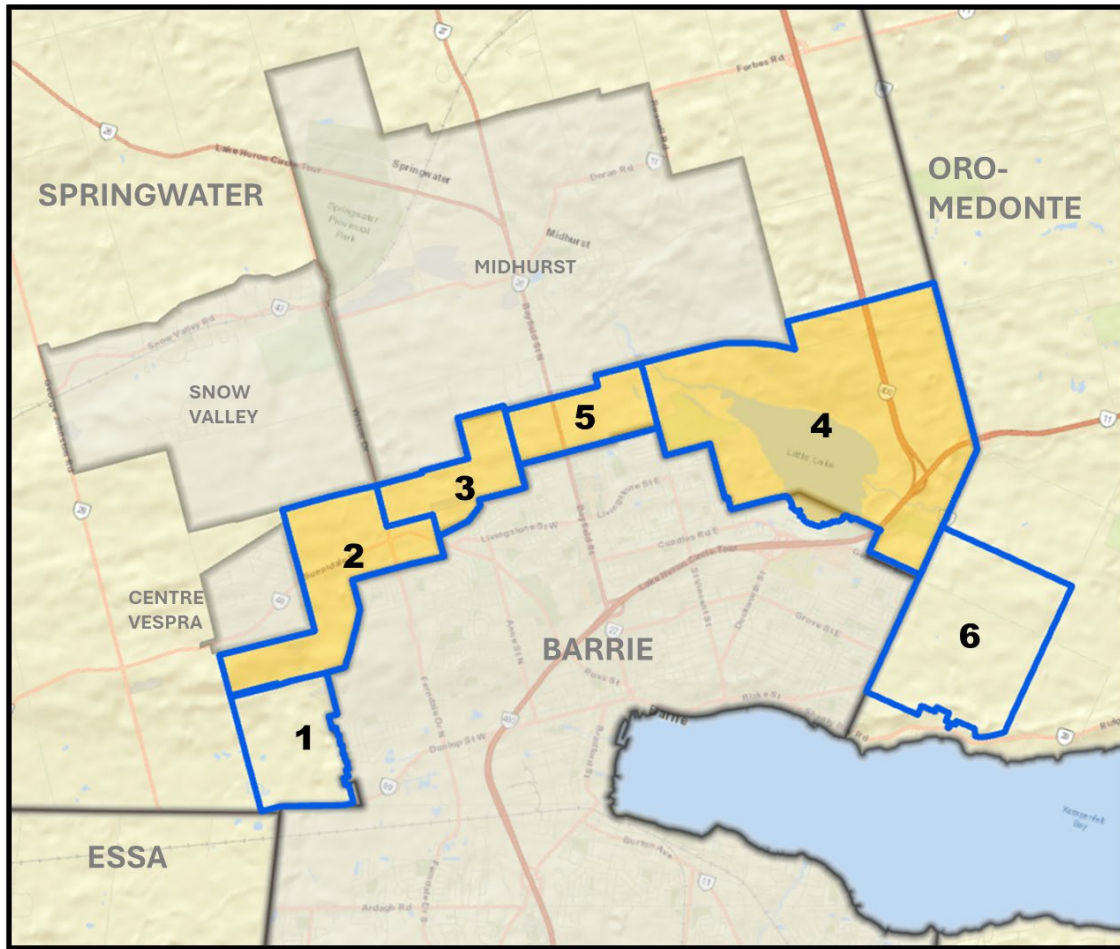
Accordingly, there is risk in assuming Midhurst could substitute for Barrie's growth if the City's expansion were to slow. Scenario 1 therefore represents a partial solution to the spillover demand and would require careful coordination with regional servicing and growth management planning.

b) Scenarios 2a and 2b – Barrie/Springwater

Scenario 2 envisions a northern expansion of Barrie along the Barrie–Springwater boundary (see Map 5). Two sub-options have been developed:

- **Scenario 2a – All Blocks Urbanized:** Urbanization of lands along Blocks 2 through 5, with Block 5 annexed to Barrie, provides sufficient land—approximately 500 hectares—to accommodate the full identified Community Area need.
- **Scenario 2b – Block 5 Retained by Springwater:** In this variation, Block 5 (Bayfield Corridor) remains within Springwater. As a result, only ~430 hectares would be available for development under Barrie's jurisdiction, falling about 70 hectares short of the 500-hectare target.

Map 5 – Scenario 2a and 2b Concept Map



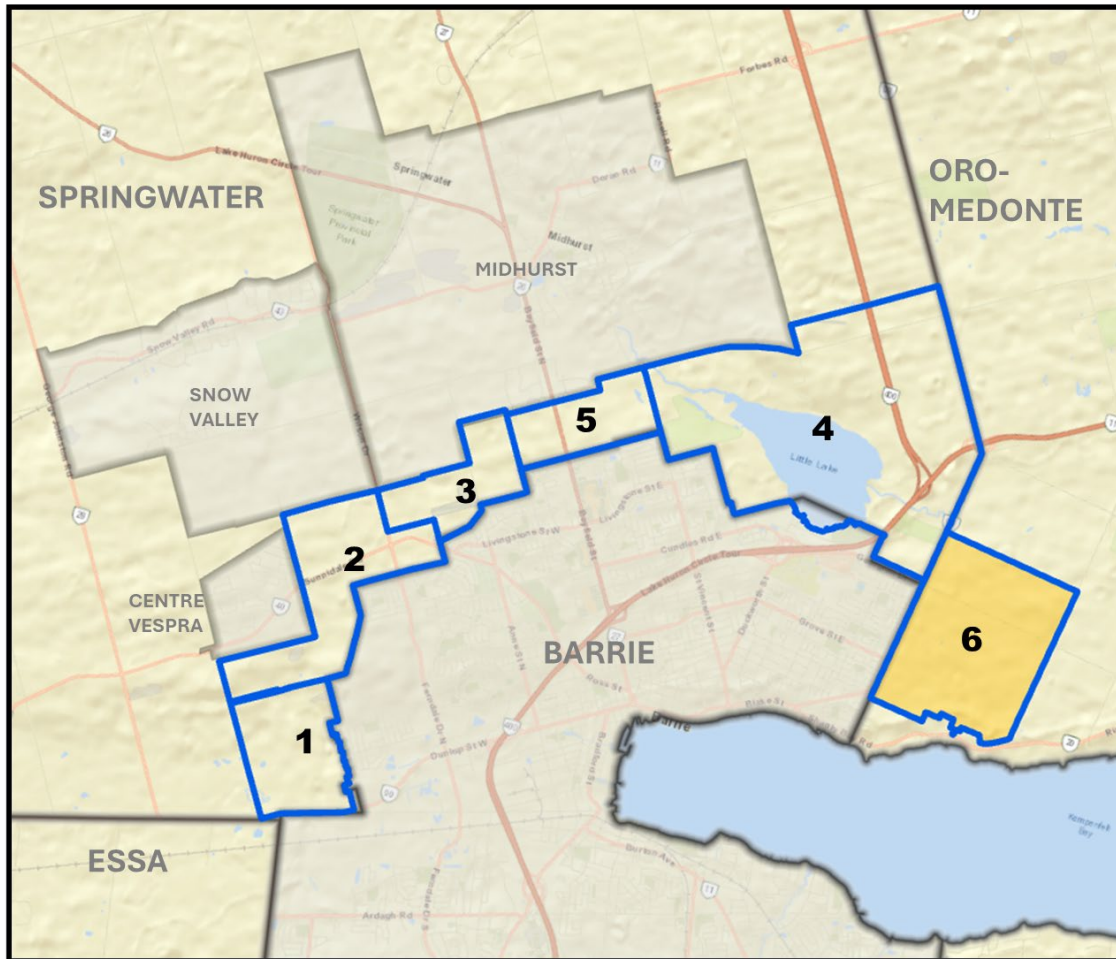
Source: Hemson Consulting

Scenario 2 offers the advantage of proximity to existing Barrie urban infrastructure and services, supporting logical extensions of the City’s growth pattern and efficient use of municipal infrastructure. The distinction between Scenarios 2a and 2b primarily affects jurisdictional boundaries and administrative responsibilities, rather than the physical location of development.

c) Scenario 3 – Barrie/Oro-Medonte

Scenario 3 considers an eastern expansion of Barrie along the Barrie–Oro-Medonte boundary, where approximately 277 hectares of developable land were identified based on the final delineation of Block 6 discussed between Oro-Medonte and Barrie in September 2025 (see Map 6).

Map 6 – Scenario 3 Concept Map



Source: Hemson Consulting

While this area offers opportunities for logical boundary adjustment and future community growth, its available land area is insufficient to fully accommodate the 500-hectare Community Area requirement on its own. Scenario 3 could, however, form part of a hybrid solution in combination with lands along the Barrie–Springwater boundary and/or lands within the Midhurst Secondary Plan area.

iv. On the Need for a Community Buffer Between Barrie and the Midhurst Secondary Plan

The potential need for a “Community Buffer” along the Springwater/Barrie boundary, should this area be developed as Community Area, was identified through consultation with the participating municipalities.

The consulting team examined the role and function of such a buffer from two perspectives:

- **Ecological connectivity**—from an environmental perspective, a broad buffer can create ecological linkages between natural heritage features, contributing to biodiversity and long-term landscape resilience.
- **Community planning and design**—from a community development perspective, a buffer can provide a range of benefits, including:
 - separating potentially conflicting land uses;
 - maintaining distinct community identities, allowing residents and visitors to perceive when they are leaving one place and entering another;
 - accommodating parks, trails, and open space;
 - establishing clear urban edges for communities, which support logical phasing of growth and infrastructure planning;
 - providing opportunities for municipalities to share community facilities and amenities.

To reflect this need, it is recommended that calculations of developable lands make provision for a 100 metre wide buffer along the Springwater/Barrie boundary. This adjustment would reduce the total supply of developable land by approximately 50 hectares within the Study Area.

E. CONCLUSION

Based on the analysis set out above, the following conclusions and recommendations are made.

i. **Participating Municipalities Should Consider Jointly Developing a New Employment Area Along Highway 400**

The Highway 400 corridor north of Barrie represents the most strategic and defensible location for accommodating new Employment Area lands within the Study Area. It combines excellent regional accessibility, a large and contiguous land base, and minimal environmental or land use constraints—qualities that no other locations in the Study Area can match.

From a planning perspective, the area directly supports the policy objectives of the *Provincial Policy Statement, 2024*, by providing for long-term economic growth and enabling employment opportunities close to where people live. From an economic standpoint, the corridor strengthens the regional employment structure of Simcoe County by addressing the Northern Regional Market Area deficit, complementing existing employment clusters around the Lake Simcoe Regional Airport and along Highway 11, and positioning Barrie and its neighbours to attract investment tied to Ontario's north-south trade and logistics network.

In short, the Highway 400 Employment Area offers a provincially significant opportunity to secure a competitive, connected, and sustainable employment base for decades.

ii. Community Area Considerations

Each Community Area growth scenario set out in this memorandum offers distinct advantages and challenges from a land use planning perspective.

- **Scenario 1 (All in Midhurst)** relies on the expansion of a newly developing community with modern infrastructure plans but remains limited in scale and may not fully substitute for Barrie's urban capacity or regional role.
- **Scenarios 2a and 2b (Barrie/Springwater)** represent the most direct and efficient options, leveraging Barrie's existing servicing, transportation, and institutional networks while providing logical extensions of the City's urban structure. However, Scenario 2b would require inter-municipal coordination to manage development in Block 5 and address the resulting land shortfall.
- **Scenario 3 (Barrie/Oro-Medonte)** presents a viable option with similar advantages to Scenarios 2a and 2b. However, it lacks the land area needed to accommodate the full Community Area requirement.

The complex servicing and environmental considerations associated with each scenario are addressed in detail in the two companion memoranda.

iii. Make Provision for a Community Buffer

It is recommended that calculations of new developable lands make provision for a 100 metre wide community buffer along the Springwater/Barrie boundary. This adjustment would reduce the total supply of developable land by approximately 50 hectares within the Study Area.

APPENDIX

SITE PHOTOS OF DEVELOPMENT BLOCKS

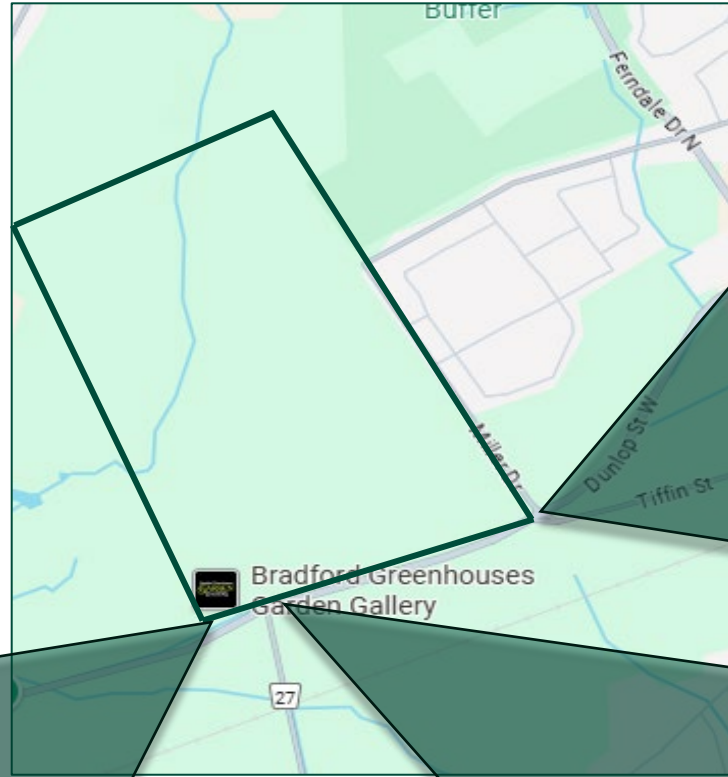
Appendix – Site Photos of Development Blocks

This appendix presents photographs of each development block taken by the consulting team during site visits conducted on May 30, 2025.

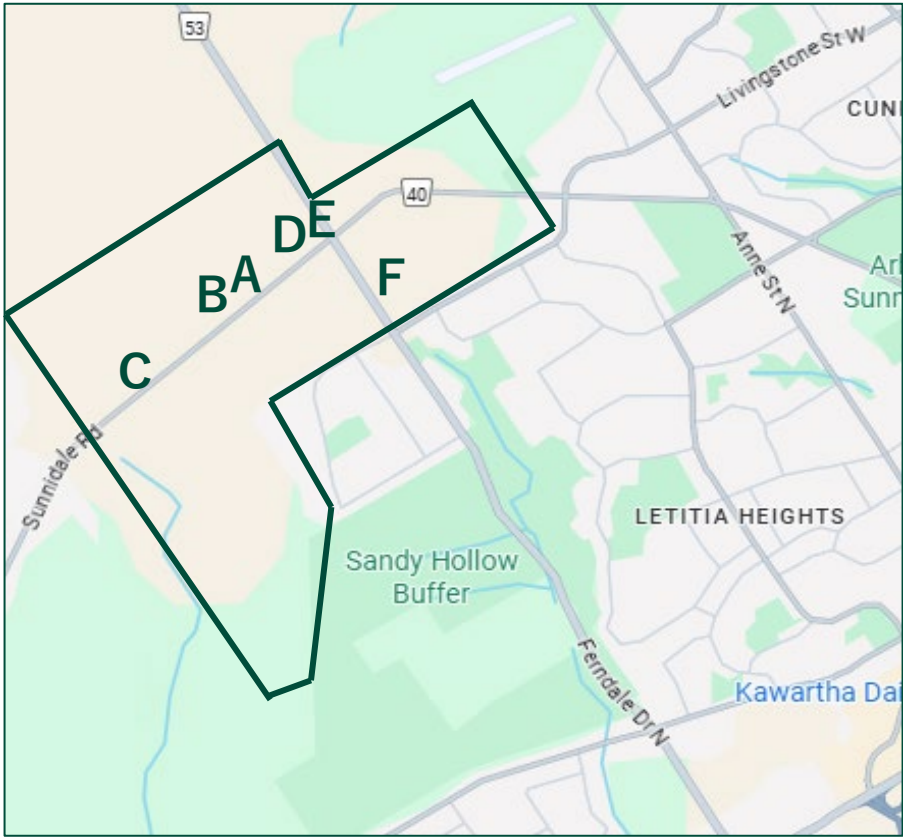
It is noted that, at the time of the site visits, the configuration of some development blocks differed from the final delineations used for the analysis of infrastructure needs and environmental constraints.

As such, the delineation of blocks shown in this Appendix does not precisely align with the maps contained in the three companion technical memoranda. In the event of any discrepancy, the mapping and boundaries presented in the companion memoranda shall take precedence.

Block 1 Site Visit Photos



Block 2 Site Visit Photos



Block 3 Site Visit Photos

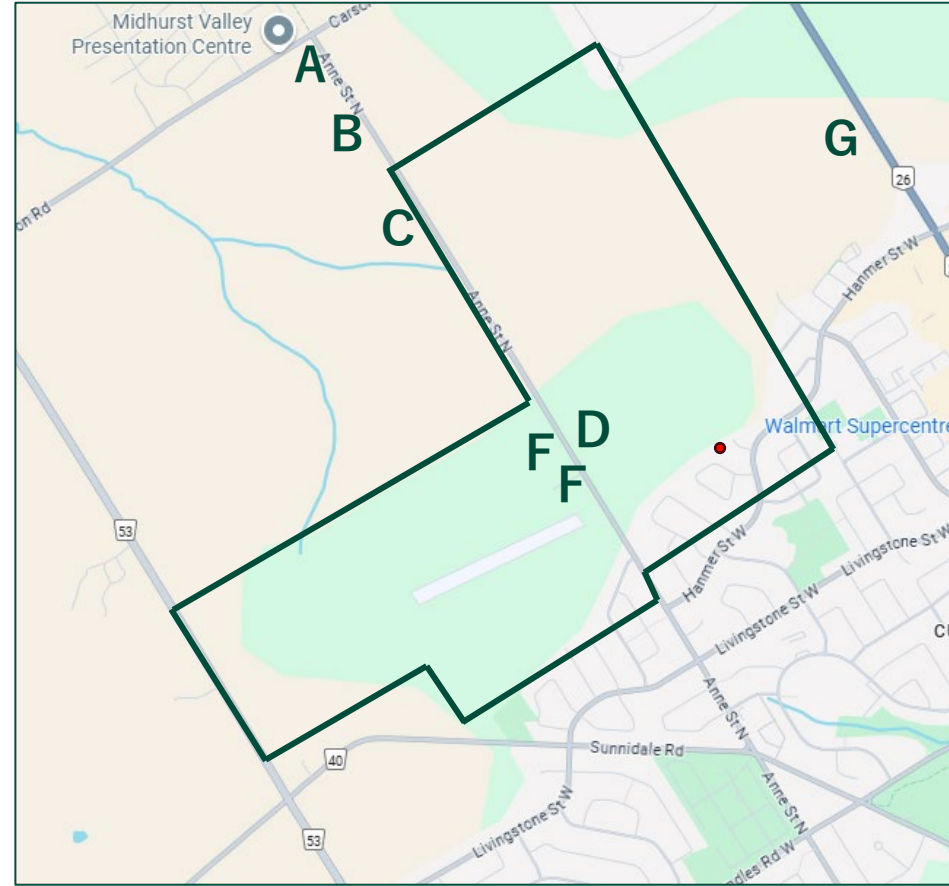
A (S. Facing)



B (SE. Facing)



C (E. Facing)



D (SE. Facing)



E (W. Facing)



G (W. Facing)



F (W. Facing)



Block 4 (Little Lake) Site Visit Photos

A (N. Facing)



B (S. Facing)



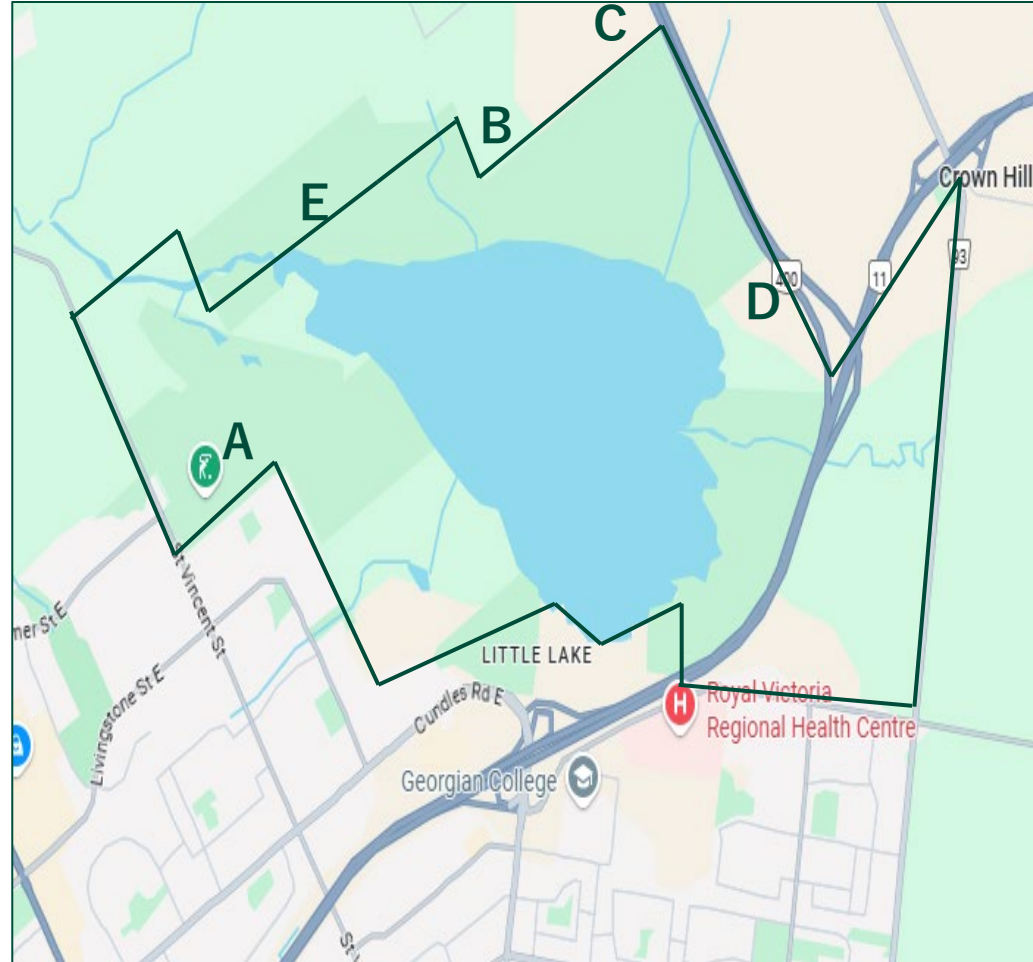
C (SW. Facing)



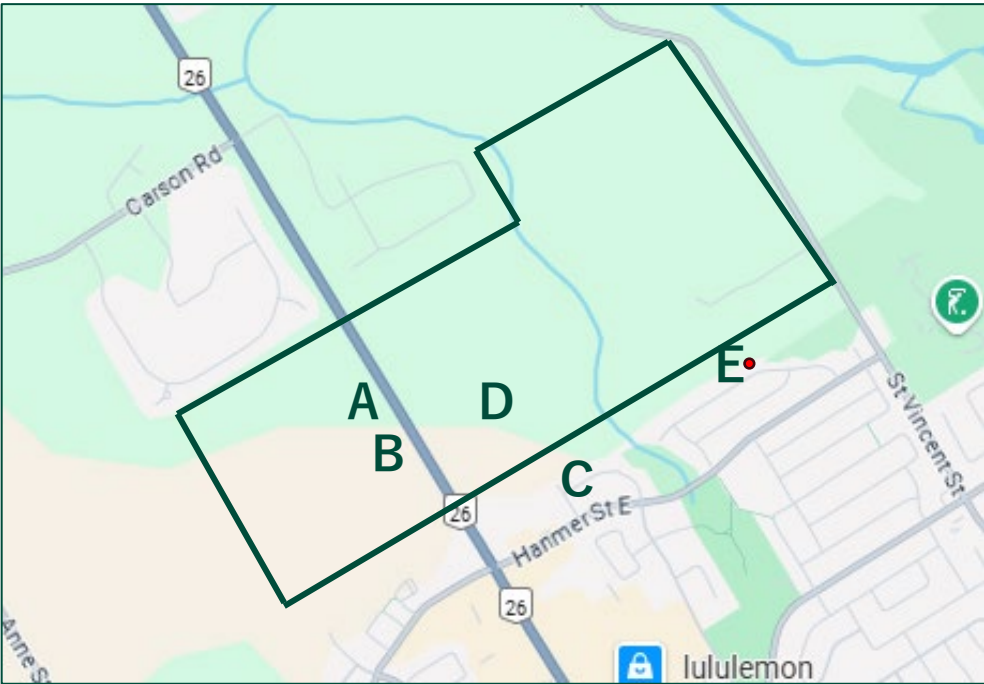
D (W. Facing)



E (S. Facing)



Block 5 Site Visit Photos



Block 6 Site Visit Photos

