

People Engaged ★ Places Defined ★ Progress Driven

# Official Plan officiel

Une collectivité qui s'engage ★ Un plan précis ★ La route du progrès

## SYNTHESIS/LAND USE AND SETTLEMENT REPORT



November, 2004

*Developing a single, up-to-date  
Official Plan that fosters sustainable growth,  
economic development and a high quality of life  
to attract people and investment.*

*Élaborer un seul Plan officiel à jour qui favorise  
la croissance durable, le développement économique  
et une qualité de vie élevée afin d'attirer  
des gens et des investissements.*



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## PREFACE

The City of Greater Sudbury was founded as a mining community and today many aspects of the City's form and nature reflect this history. Greater Sudbury is Canada's largest resource community. It has within its boundaries the single largest nickel mining complex in the world and a group of mines that have continued producing a variety of base metals since their first discovery in the late 1800s.

Greater Sudbury is centrally located as the hub of Northeastern Ontario. As home to Laurentian University, Cambrian College and Collège Boréal, it is an important post-secondary education and research centre. The new Hôpital régional de Sudbury Regional Hospital and Northern Ontario School of Medicine have positioned Greater Sudbury as a medical referral centre. A strong mining heritage and knowledge base make the City a natural location for further mining development and an expanding mining services sector. The growing retail sector has made the City a popular shopping destination in the North. Greater Sudbury also has an active arts & culture sector and offers many recreational opportunities that contribute to the quality of life.

At the same time, the soils of the Sudbury Basin provide the potential for a viable agricultural economy, a rarity in Northern Ontario. This Basin houses 23 different communities of varying size, each of which has developed its own character and lifestyle.

The City is the largest in geographic area in Ontario and provides the classic Northern Ontario lifestyle with access to virtually untouched Crown land within minutes. It offers a wide variety of choices in lifestyle and living accommodation.

## 1.0 SYNTHESIS

### 1.1 INTRODUCTION

The Official Plan Review began with a series of nine technical background studies conducted to establish an understanding of the current situation in Greater Sudbury, to provide information to assist in the achievement of the City's objectives and to recommend directions with respect to policy and the Official Plan. The studies carried out include the following:

Transportation Background Study  
Infrastructure Background Study  
Stormwater Background Study  
Rural and Waterfront Development Background Study  
Agricultural Background Study  
Natural Heritage Background Study  
Healthy Communities Background Study  
Parks, Open Space and Leisure Background Study (and Master Plan)  
Housing Background Study (commenced this fall)

In addition to this work, several other recent or ongoing studies will inform the Plan.

The City completed an Economic Development Strategy in 2003 entitled "Coming of Age in the 21<sup>st</sup> Century" that provides an understanding of the key sectors of economic growth likely to offer employment growth in the future. The strategy identifies five economic engines of growth:

- Engine 1: The best mining and supply services in the world
- Engine 2: A city for the creative, curious and adventuresome
- Engine 3: One of Ontario's top 4 destinations
- Engine 4: A leader in health innovation and biotechnology
- Engine 5: A model for eco-industry and renewable energy

Opportunities will be sought to support this strategy through the land use policies in the Official Plan.

The Health and Social Services Department is currently undertaking a Human Services Plan in partnership with the Social Planning Council. Also, a Seniors Study undertaken by the City addresses opportunities and needs posed by our aging population. The report, entitled "Action Planning for Sudbury's Golden Opportunity," encompasses broad land use directions and economic development. The City's Public Works department is currently undertaking a study to identify groundwater resources in the City and the steps necessary to protect the various sources of the City's drinking water. Regard shall be had to the findings of this report and the need for any special land use responses. The background studies were conducted with many and varied opportunities for public input.

Some of the studies involved the direct input of specific public advisory committees. For example, the City's Agricultural Advisory Panel played an active role in the "Land Evaluation and Area Review" (LEAR) process undertaken as a major part of the Agricultural Background Study. In addition, the Greater Sudbury Lake Improvement Advisory Panel and the Ramsey Lake Advisory Panel both participated in a consultation session related to the Rural and Waterfront Background Study.

A total of twenty-seven (27) public meetings and open houses, beginning in October 2003 and ending in June 2004, were held in conjunction with the Official Plan Background Studies. Project participants also met with a variety of interested parties including the Development Liaison Advisory Committee (DLAC), INCO representatives, the Accessibility Advisory Panel and the Sudbury East Ratepayers Association. Several of the public meetings associated with the Healthy Communities study were hosted by local Citizen Action Networks (CANS).

Results of "Sudbury 20/20 – Focus on the Future," a visioning session of community stakeholders, will also be considered in the review. The sessions were held in 1999 and yielded several directions for the future which are consistent with the more current Economic Development Strategy of the City.

## **1.2 ANALYSIS**

The following provides a brief summary of the major findings and conclusions of each of the background studies.

### **Healthy Communities**

The Healthy Communities model recognizes that individual well-being is a function of a variety of determinants related to the quality of our social, natural and economic environments. Council has embraced the Healthy Community model and the model will be one of several key principles of the new Official Plan. The Healthy Communities study was undertaken to identify the ways in which Official Plan policies could reflect the principles of this model. Members of the public participating in the Healthy Communities study provided the following list of determinants for making Greater Sudbury a healthy community:

1. Citizens engaged in their community through local decision-making processes.
2. Accessible, utilized recreation programs and facilities.
3. A prosperous community with abundant employment opportunities.
4. Accessible health care and fitness.
5. Preservation of our natural assets.
6. Sound municipal infrastructure and service delivery.
7. An inclusive, diverse and tolerant community.
8. Social support for all challenged citizens.
9. A unified city.

10. A safe city.
11. Superb educational opportunities accessible to all residents.
12. A compelling community vision with strong leadership at all levels.

Recognizing that the scope of influence of an Official Plan is somewhat limited in some of these areas, the study suggested ways in which Official Plan policies could address the determinants.

A related initiative of the City is striving to identify a framework for implementing the Healthy Communities model in the community. This project involves representatives of the City and a variety of community stakeholders.

## **Infrastructure**

Based upon a detailed inventory and review of existing major wastewater and water facilities throughout the City of Greater Sudbury, there is sufficient domestic water and wastewater capacity to accommodate all potential growth over the 20 year planning period. The only possible exceptions to this are the Azilda Wastewater Treatment Plant which is approaching its capacity limits and the Dowling Wastewater Treatment Plant which would be only marginally over capacity under the highest growth scenario. Beyond that, there is sufficient additional capacity in all of the other wastewater treatment and water supply facilities to accommodate levels of growth well beyond what is anticipated. This will mean that choice and location of development will continue to be available without a major capital cost to the City. There are many areas where land and lots are available that are either serviced or relatively close to existing services, thus further reducing potential servicing costs.

It should be noted that facilities such as lift stations may require upgrading depending on the location of new development. However, these costs are normally borne by the developer. Also, the water and wastewater distribution systems were only analyzed at the trunk main level. Distribution and collection systems below this level were not analyzed and again, depending on the location and scale of new development, upgrading may be required in these areas as a condition of new development.

While domestic flow capacity at the City's facilities are adequate, there is an issue of fire flow levels in various areas of the City. This issue is being reviewed and findings are expected in the next couple of months.

## **Transportation**

A relatively sophisticated transportation model was developed and used to determine the adequacy of the major road network to accommodate future development. The Transportation Study has found that existing problem areas with respect to traffic congestion are likely to continue to be the problem areas in the future. This essentially

means that no new shortfalls in roads system capacity are expected to occur over the forecast period. As such, the Transportation Study will point to options for localized improvements and two new roads to deal with existing congested areas. The new roads include the extension of Maley Drive parallel to LaSalle Blvd. and a second access to the University.

To arrive at preferred options identified in the Transportation Study, a series of criteria were applied to various network improvement options. These criteria included the impact on transportation, the impact on the social/cultural environment, the impact on the natural environment, the impact on the economic environment, consistency with land use planning principles and costs associated with each option.

The study has also found that the number of transit trips per capita in Greater Sudbury is higher than the level achieved by many similarly sized cities. This is attributed to good service planning, a significant student population and effective service coverage. Consistent with the 2003 State of the Community opinion survey, the telephone survey undertaken as part of the Transportation Study confirmed that the maintenance of roads is a major issue in the community.

The study also has identified the growing desire in the community for trails and routes for bicycles and pedestrians. From public input received during the background study it was apparent that residents see this as an important contributor to the quality of life in the City. The study suggests further development of a bicycle route strategy.

Based on input from the Accessibility Advisory Committee, the Transportation Background Study has identified concerns ranging from inadequacies in the provision of barrier free parking spaces to the condition of sidewalks and curb cuts. It was noted that greater requirements for the provision of barrier free spaces may be appropriate in an aging community.

## **Parks, Open Space and Leisure**

Parks, open space and leisure facilities contribute to the social, cultural and economic well being of Greater Sudbury residents and enhance the overall quality of life. The adequate provision of these services is an important part of retaining and attracting residents, particularly young adults and families. Unless recent population growth trends change, there will be limited opportunities for large park sites to be dedicated to the City as a result of development activity. In an aging population, multi-purpose and multi-generational community leisure facilities should be encouraged.

As with the transportation study, this study found a significant demand for more multi-use trails and bike lanes. The study suggests that policies be developed to provide a trail system which links to major civic facilities, parks, educational institutions, employment areas and tourist attractions. This study also recommended revisiting and building upon the work of the former City of Sudbury Bicycle Advisory Committee. This



study suggests setting minimum targets for parkland and open space provision such as the provision of 4 hectares of parkland per 1,000 population located within 800 metres of residential areas. In particular, the study suggests the need for a multi-use recreation complex in the New Sudbury/Flour Mill area.

The issue of park maintenance and design is addressed and a greater emphasis on high-quality park and facility design is suggested. Consistent designs for signage, buildings and development features are seen as a way of unifying the system and assisting residents and tourists in identifying public parklands.

Consistent with the Accessibility Plan, the Parks, Open Space and Leisure study notes the need for more accessible playgrounds and other leisure facilities. It suggests such operational actions as the use of accessibility audits of leisure facilities and the establishment of standards for trail development.

## **Agriculture**

The Agricultural Background Study applied the “Land Evaluation and Area Review (LEAR)” process developed by the Province. This process provides a method to establish local criteria for identifying prime agricultural lands. The Council-appointed Agricultural Advisory Panel served as the LEAR committee and received input from other interested participants from the community as the study proceeded.

In addition to Canada Land Inventory for Agriculture soil classifications, which must be included as one of the key criteria in the LEAR process, the Agricultural Advisory Panel examined lot size, proportion of arable land, drainage, surrounding land uses, history of agricultural use, road access and history of topsoil stripping to arrive at a ranking of lands. Utilizing Geographic Information System (GIS) technology, a scoring system was developed and a threshold score for prime agricultural land decided upon.

In general, the Agricultural Advisory Panel advocated the protection of an agricultural land base similar in size to the existing Agricultural Reserve. As a result of the LEAR exercise and extensive discussions with the panel, the Agricultural Background Study suggests a two-tier approach to the designation of agricultural lands in the new Official Plan. Prime Agricultural land would be those lands scoring highest in the LEAR exercise and would be subject to more regulatory control consistent with the Provincial Policy Statement. Other lands which have a lower score but which still have a good capability for agriculture would be placed in a different Agricultural Designation which would have more flexible policies but which would still reinforce the value of protecting these lands for current and future farming.

The actual policies to apply to the agricultural land are left to the Official Plan process although possible directions are suggested. A major factor in these policies will be the Provincial Policy Statement mentioned above. The Province is presently in the process



of reviewing this document and the final outcome will set some of the parameters for formulating agricultural policies in the Official Plan.

## **Waterfront and Rural Development**

This background study was focused on issues associated with residential and seasonal development outside of the settlement areas. Historically, this community has experienced about 10% of its growth outside of settlement areas. It is anticipated that this lifestyle choice will be available to residents in the future.

As part of the Waterfront and Rural analysis, it was determined that there are approximately 767 vacant lots in rural areas of the City over 2 ha in size and 630 vacant lots on the shorelines of the 43 priority lakes that meet current zoning standards for the construction of a dwelling. Among other things, this study reviewed the potential for lot creation on the lakes as an economic development initiative and recommended policies dealing with permanent and seasonal uses on the lakes.

Public input received during this study revealed significant concerns over the condition and impact on lakes of private septic systems. It was a major conclusion of the study that steps be taken to ensure that property owners properly maintain their private septic systems. Possible responses include increasing public awareness through education as well as implementing a more active monitoring program (e.g., requiring the inspection of private sewage disposal systems as a condition of planning approvals). This issue has particular relevance to the discussion of the potential conversion of seasonal uses to permanent homes.

The public was also concerned about issues pertaining to the status of local roads. Occasionally in rural areas development relies on private roads for access. As a result, road maintenance issues are important to those affected. The City's current road assumption policy has been considered in this context and appears to address this issue.

The study notes that the issue of permanent vs. seasonal use of waterfront properties is a difficult issue. Most jurisdictions have not been successful in limiting the use of dwellings to seasonal use. As such, an alternative system which concerns itself less with controlling months of use, and instead ensures that both building and sewage disposal standards are met by all dwellings, is an option which may be considered. Related to this, the conversion policies in existing Official Plans and Secondary Plans should be reviewed to ensure an orderly and regulated conversion process.

The background study also considers various ways of determining how much new development may be permitted on lakes. New technologies offer an opportunity to mitigate the impact of development on waterbodies and where appropriate these will be considered. However, controls on phosphorus loading as an indicator of declining water quality will remain a key determinant in waterfront development.

## Natural Heritage

This study involved the first comprehensive inventory of natural heritage features in the City of Greater Sudbury. This work, which has compiled and assessed a broad range of existing data on the natural heritage features, has produced detailed mapping that will be invaluable in ensuring that significant natural heritage features and areas are considered in the planning and development of the City.

The Greater Sudbury Natural Heritage Study has identified the following features for consideration during the development of the Official Plan:

- Significant portions of the habitat of endangered and threatened species;
- Significant wetlands;
- Fish habitat;
- Significant wildlife habitat;
- Sites of Geological Interest that reflect the importance of geology to the Greater Sudbury area; and,
- Elevated rock outcrops that reflect the importance of these features as defining elements of Greater Sudbury's urban area.

Consideration should also be given to the ecological recovery of thousands of hectares of land that were severely impacted by past mining activities in the Greater Sudbury area. The extent of the impacted area, which is without parallel in Ontario, has profound implications for not only the City's natural heritage but also its image, recreational opportunities, and general environmental health.

The Study also identifies the City's watersheds as important natural heritage features that should be used as the integrative framework for environmental planning and management. Importantly, watershed-based planning would help ensure that the City's precious water resources are considered in land-use planning and development.

## Stormwater

The Stormwater Study has focused on the identification of watersheds in the City of Greater Sudbury in order to understand where remedial work may be necessary to improve the quality of water. Historically, stormwater management measures have focused on water "quantity" issues rather than water "quality" issues. The emphasis was on moving water quickly away from developed areas to receiving streams and lakes. In order to protect the quality of our lakes and rivers, it is necessary to consider the impact of stormwater measures on surface water quality.

Seven priority watersheds have been identified based on a review of existing water quality issues, flooding history, land use and water use. Each watershed is being characterized, important subwatersheds identified and primary stormwater issues listed. The study will propose urban drainage policies for consideration during the Official Plan process as well as draft urban drainage implementation guidelines to apply to new

development. Given the fact that many of our waterbodies are already subject to urban runoff from impacts from existing development, the study will suggest options to address these existing situations.

It also should be noted that new “source water protection” legislation from the Province is imminent and this will have implications for storm water drainage and other factors affecting drinking water sources.

### 1.3 EIGHT DIRECTIONS FOR THE NEW PLAN

The number and range of findings emerging from the background studies is substantial. This information will not only inform the development of Official Plan policies, but will also provide a comprehensive context for the formulation of the basic principles on which the Plan will be based. Eight key directions flow from this work:

1. **Major sewer and water treatment facilities and the major road network in Greater Sudbury have the capacity to support new growth.** With strategic upgrades and maintenance, the wastewater and water treatment infrastructure currently exists to accommodate growth for the foreseeable future. However, the establishment of new fire flow standards is an important issue which will need to be addressed given constraints posed by our existing water distribution system.  
  
The road system, while requiring some improvements, will be sufficient with these improvements to serve new growth. This circumstance will provide a wide range of choice to Greater Sudbury’s residents – choices in where to live and where to work.
2. **The Plan will provide for land use permissions and processes that make the City a good place to do business.** Economic growth and diversification will be fostered by land use policies that provide good locations with excellent infrastructure for employment opportunities. The needs of the mining industry will be addressed, as will measures to support the health and educational sectors.
3. **There are and will be many choices where to live.** The City does not need to expand its residential communities beyond what is currently planned. There are many choices on where and how to live in the City as the former municipalities have each developed their own character and lifestyle and are within reasonable commuting distance to the former City of Sudbury. These communities should be recognized, supported and allowed to develop further to the limits of the existing capacity of the infrastructure.

Outside of urban areas, the City has provided a variety of living choices in rural settings. With the City's abundance of lakes, there are and will continue to be excellent opportunities for waterfront living.

4. **The central urban area will continue to be a major focus of growth and change.** The former City of Sudbury currently provides three quarters of the jobs for residents of the City. This proportion will grow as the service, educational and health sectors of the economy expand in the future. Key locations to support this growth and diversification will be identified by the Plan and supported by the proposed improvements to municipal infrastructure.
5. **Health, education and commercial facilities will be further encouraged to develop in the City as it is the focus of a large market in Northeastern Ontario.** The new Plan will provide sufficient lands and locations for these facilities such that governments and the marketplace can operate to provide residents with the greatest degree of choice of goods and services.
6. **The heart of the City, its most urban place, is and will be Downtown Sudbury.** With the changing role of downtowns in Greater Sudbury and other cities, appropriate policies and programs need to be developed to enhance the downtown core as a location of government, commerce, cultural and entertainment facilities. Further growth of residential populations in and around the downtown will support new and expanded facilities in this area.
7. **Living in Greater Sudbury will continue to mean almost immediate access to the wilderness, an important tradition of a Northern Ontario lifestyle.** The current settlement boundaries provide for this pattern of wilderness to separate communities and to provide these outdoor recreational opportunities. Much of the open spaces have been re-greened and this process will continue. In the future, the use of open space, trails and tracts of greenspace will be more formalized to serve an aging population.
8. **Community Improvement will be an important future focus.** Community Improvement Plans are an effective means by which a municipality can improve the quality of life and plan/implement a wide range of initiatives which can contribute to making Greater Sudbury a Healthy Community. In past years there has been a successful program of preparing community improvement plans in partnership with stakeholders. The new Official Plan will identify new opportunities for community improvement initiatives to address issues in older areas, around lakes and in other unique locations across the City.

## **2.0 LAND USE AND SETTLEMENT OPTIONS**

### **2.1 INTRODUCTION**

The City of Greater Sudbury has a population of 155,225 persons living within a geographic area of approximately 3,627 square kilometers. Over this expanse of land there are approximately twenty-three urban and non-urban settlements, of which 17 are provided with both piped water and sewer services.

Population in the communities that make up the City of Greater Sudbury reached a peak of approximately 170,000 persons in 1971. Since that time the population has gone through several cycles of decline and recovery but has shown a continued demand for new housing over the past thirty years. This demand is due to the reduction in average household sizes, both a national and local trend leading to more homes being required for the same population.

As part of the preparation of a new Official Plan it is important to understand the amount and nature of demand for land for urban uses that may be expected in the future. The current Official Plan designates areas of land for a variety of urban purposes, based upon assumptions made a number of years ago about anticipated growth rates. The Provincial Policy Statement provides that municipalities may plan to accommodate growth projected for a time horizon of up to 20 years. The analysis described in this paper determines whether existing urban boundaries are capable of accommodating the anticipated growth over that time frame. A separate analysis will determine if the existing urban boundary should be revised for other purposes, such as providing more suitable lands for employment purposes.

The growth and settlement analysis in this report examines population and household projections in order to determine the amount of urban residential land that the Official Plan designates to meet future demand.

In order to review the adequacy of existing infrastructure to accommodate development in the future and make informed planning decisions, assumptions must also be made about the range of development options for the distribution of future growth. As such, this document also reviews the technical basis for assigning expected growth to specific geographical areas so that engineering and transportation modeling exercises could be undertaken.

### **2.2 PROVINCIAL POLICY STATEMENT**

The Provincial Policy Statement outlines the following policies that the City must have regard for in determining the extent of urban development.

#### *1.1 Developing Strong Communities*

*1.1.1 Subject to the provision of policy 1.1.2, cost-effective development patterns will be promoted. Accordingly:*

- a. Urban areas and rural settlement areas (cities, towns, villages and hamlets) will be the focus of growth;*
- b. Rural areas will generally be the focus of resource activity, resource-based recreational activity and other rural land uses;*
- c. Urban areas and rural settlement areas will be expanded only where existing designated areas in the municipality do not have sufficient land supply to accommodate the growth projected of the municipality. Land requirements will be determined in accordance with policy 1.1.2. The policies of Section 2: Resources, and Section 3: Public Health and Safety will be applied in the determination of the most appropriate direction for expansions. Expansions into prime agricultural areas are permitted only where:*
  - 1. There are no reasonable alternatives which avoid prime agricultural areas; and*
  - 2. There are no reasonable alternatives with lower priority agricultural lands in the prime agricultural area;*

*1.1.2 Land requirements and land use patterns will be based on:*

- a. the provision of sufficient land for industrial, commercial, residential, recreational, open space and institutional uses to promote employment opportunities, and for an appropriate range and mix of housing, to accommodate growth projected for a time horizon of up to 20 years. (However, where a longer time period has been established for specific areas of the Province as a result of a comprehensive provincial planning exercise, such as that coordinated by the Province in the Greater Toronto Area, that time frame may be used for upper and lower tier municipalities within the area);*

This paper deals specifically with the technical analyses to address Section 1.1.2 a.

## **2.3 RESIDENTIAL DEVELOPMENT LAND NEEDS**

### **Demand – The Population Forecasts**

Based on the 2001 Census of Canada, the population of the City of Greater Sudbury was 155,225. There were 63,020 households with an average household size of 2.46 persons.

The City has prepared three projections of population growth over the next twenty years based on varying scenarios of out-migration, natural increase and in-migration.



Each scenario was developed with an associated household projection based on current trends of decreasing average household size. The assumptions regarding decreasing household size varied slightly among the scenarios. The three scenarios are as follows:

- **out-migration** - out migration exceeding natural increase and in-migration, resulting in a decline in population;
- **natural increase** - out-migration and in-migration have no net effect, leaving natural increase to affect population levels; and,
- **in-migration** – in-migration exceeding out-migration, resulting in a population increase.

The forecasts are detailed in Tables 1 and 2 in Appendix A of this report. The results are summarized below, showing the changes in population and the resulting demand for new housing units based on the formation of new households.

**TABLE 1: Summary of Population and Household Projection, Years 2006, 2011, 2021**

Year 2006	Population	Households	Avg. Household Size
Out-migration	151,625	63,807	2.38
Natural Increase	154,983	64,993	2.38
In-migration	157,954	66,021	2.39

Year 2011	Population	Households	Avg. Household Size
Out-migration	147,103	64,128	2.29
Natural Increase	154,067	66,679	2.31
In-migration	162,307	69,662	2.33

Year 2021	Population	Households	Avg. Household Size
Out-migration	135,407	62,270	2.17
Natural Increase	150,012	67,857	2.21
In-migration	169,579	75,276	2.25

The out-migration scenario is based on the twenty-year historical trend for out-migration. In this scenario, out-migration outpaces growth resulting from in-migration and the natural increase component. Out-migration was averaged to be a net of 650 persons per year leaving the City. The twenty-year projection results in a population of 135,407 and a demand for households 750 units lower than the current number of existing households. The average household size is projected at 2.17 persons.



The natural increase scenario assumes a net migration of zero and is based on births and deaths alone. This scenario produces a twenty-year horizon population of 150,012 and an increase in the number of households to 67,857, an increase of 4,837 households overall. Average household size is projected to be 2.21 persons.

The in-migration scenario assumes a return to the population peak of 1971 with a population of 169,580 by 2021. The number of households resulting from this population would be 75,276, an increase of 12,256 households overall, with an average household size of 2.25 persons.

This data is summarized in the Table below.

**TABLE 2: Population and Net New Households, 2021**

<b>2021</b>	<b>Out-migration</b>	<b>Natural Increase</b>	<b>In-Migration</b>
<b>Population</b>	135,407	150,012	169,579
<b>Net New Households</b>	(750)	4,837	12,256

### **Supply – Vacant Lot/Designated Land Inventory**

The current supply of land for future residential uses has been calculated. In this context the supply includes lots in draft-approved plans of subdivision and land designated in the existing Official Plan for residential use.

An analysis of lot creation patterns was undertaken to determine the nature and amount of development in unserviced areas from septic system applications, building permits and lot creation records. On the basis of this analysis, the recent historical trend is that 20% of lots created have been in rural and waterfront areas. No survey of the potential for infilling or intensification was undertaken. Alternatively an assumption was made that 5% of the future demand will be met in this way.

In order to undertake this analysis the following assumptions have been made:

1. In recent years lot creation outside of the urban areas has been 20% of the total. For the purposes of this analysis it has been assumed that this trend will continue.
2. It was assumed that land designated in the Official Plan, a combination of low and medium density, will build out at an average of 12 lots/units per hectare.

3. It was assumed that 5% of the future demand will be met by infill and intensification in existing urban areas, on vacant individual lots or redevelopment sites.

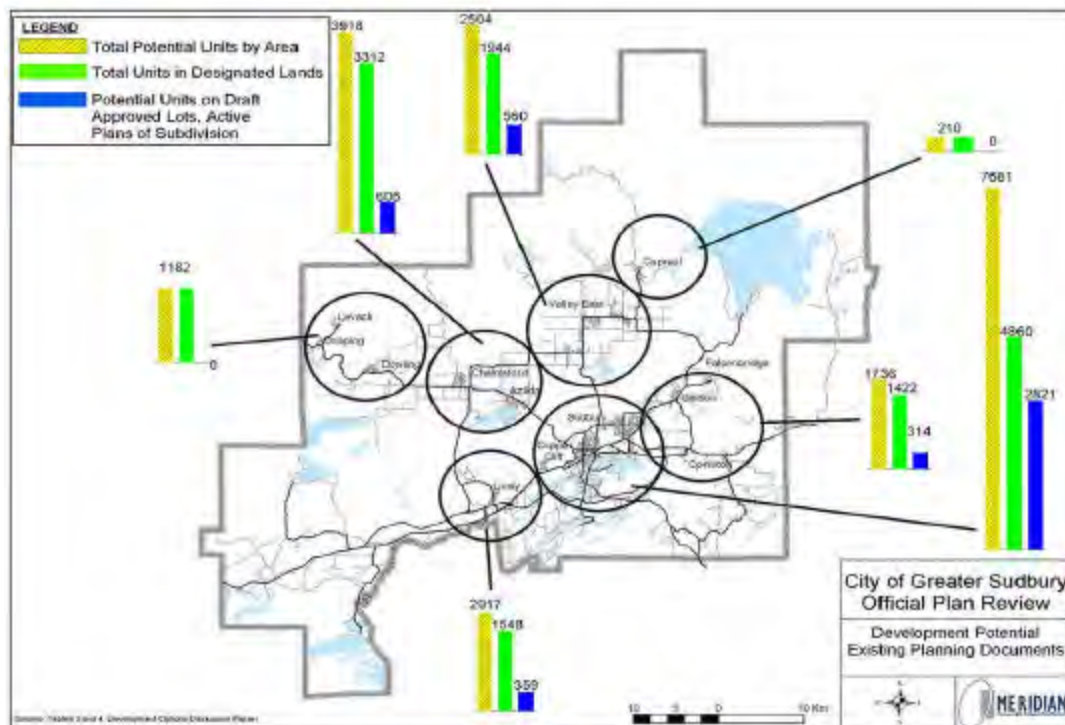
A summary of supply of land for residential purposes is shown in Table 3. More detail is provided in Tables A3 and A4 in Appendix A of this report.

**TABLE 3: Capacity of Residential Land, 2003**

2003	Potential Lots	Potential Units
Active Subdivision Draft Approved Lot Supply	3,584	4,660
Designated Residential Land in Current OP (12 units/ha)	14,472	14,472
<b>TOTAL</b>	<b>18,056</b>	<b>19,132</b>

According to Active Subdivision Plans statistics from the City of Greater Sudbury the current draft-approved lot supply is 3,584, with an associated unit potential of 4,660. The lands designated for low and medium residential development in the existing Official Plan have the capacity to yield an additional 14,472 units for a combined total of 19,132 units. The capacity is shown by area in Figure 1 below.

**FIGURE 1: Capacity of Residential Land By Area, 2003**



## Comparison of Supply And Demand

The result of the population and household projection (unit demand) was compared to the baseline designated land and potential units (unit supply). The results of the comparison are shown in Table A5 of the Appendix and summarized as follows.

**TABLE 4: Household Supply and Demand, 2021**

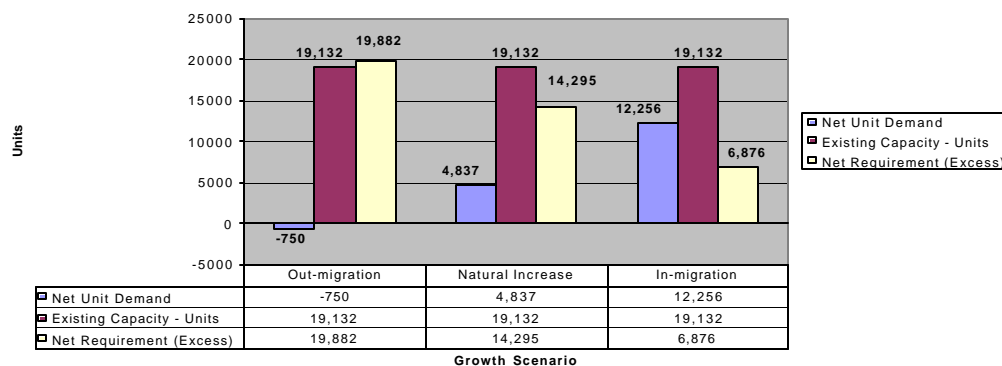
Scenario	Pop. 2021	2021 Demand - Units	2001 No. of Units	Net Unit Demand	20% Outside Urban Areas	5% Infill	Capacity - Units	Net Requirement (excess)
Out-migration	135,407	62,270	63,020	-750	n/a	n/a	19,132	(19,882)
Nat. Increase	150,012	67,857	63,020	4,837	967	242	19,132	(14,295)
In-migration	169,579	75,276	63,020	12,256	2,451	613	19,132	(6,876)

Note: There is an excess of supply over demand in all scenarios.

The out-migration scenario household demand is exceeded by the current supply of built units. The natural increase scenario combined with the trend toward decreasing household size will create a demand for 4,837 more units than current supply. As there are 4,660 units currently in the draft-approved lot stage it can be assumed that the current lot inventory in the draft-approved stage plus infill will adequately meet this demand.

The in-migration scenario has a demand for 12,256 new households. When all designated land is included in the potential supply and infill is accounted for, as seen in Table 4, the supply of land provides a potential for 19,132 new units, which is well above the demand. The potential supply exceeds the potential demand in all scenarios.

**FIGURE 2: Household Supply and Demand by Growth Scenario**



## 2.4 COMMERCIAL AND INDUSTRIAL LAND NEEDS

The analysis of potential need for residential land for growth is only part of the equation. In addition to land for residential uses, the City will have a demand for land to accommodate employment growth. In general terms, employment growth typically is of two kinds – that which serves the local population and that which serves a larger or external market. Population-serving employment generally is that which would be found in any community as employment in stores, schools, churches and other facilities related to residential areas. Across Canada there is generally one population-serving job for every five persons. Thus, for every thousand persons increase in population there would be an additional 200 employees serving that population.

It has been found that that land required for population-serving employment generally is a relatively small component of land need and is often found within residential communities. As such, calculations generally do not consider this component.

However, the demand for land for industry and facilities that are unrelated to the local population can be substantial and can be calculated. In Greater Sudbury today there are approximately 46 jobs for every hundred persons living in the City. While 20 of those jobs serve 100 people, 26 of those jobs do not and require land in industries, business parks or office buildings in order to function.

The calculation of the need for that land over the next 20 years is done in a manner consistent with the calculation of land required for residential purposes. Earlier in this report, three levels of future population growth were reviewed to determine potential land requirements. The greatest of these termed the “in-migration scenario” involved an increase of approximately 15,000 persons. Assuming that there would continue to be the same ratio of jobs to population in Greater Sudbury, that is 46 jobs to every 100 persons, there would then be an additional 6,900 jobs in Greater Sudbury at a population level of approximately 170,000 persons. Of those 6,900 jobs, there would be 3,000 population-serving jobs (one job for every five persons). This leaves a net of 3,900 jobs for which there will be a demand for serviced land or land within industrial areas.

The density of employment in communities such as Greater Sudbury varies significantly. Employment over large areas used for mining operations can be extremely low, less than one employee per hectare of land, as the land base required for mining has literally nothing to do with the number of employees but rather with other geological and geographic factors. The amount of land required for office employees, however, can be calculated based on the assumption of approximately 300 sq. ft. of office space for each employee. Combined with parking requirements for a one-storey building, this would mean that there would be approximately 170 office employees for a given hectare of land. It has been found through studies in other communities that employment in typical business parks or industrial areas will range from 20-40 employees per hectare depending upon the nature of the operation, the age of the area and the type of uses.

A review of existing employment levels in Greater Sudbury indicates very generally that densities would appear to be in the range of 15 employees per hectare on average. This same review has determined that there are approximately 1,320 hectares of land developed for a variety of industrial purposes in the City. In addition, within the designated industrial lands there are 1,767 hectares of land that remain vacant, not including the large areas of land designated for mining exploration and operations.

Applying this average density to the number of new employees anticipated over 20 years results in a demand for an additional 260 ha ( $3,900/15=260$ ). This is clearly well below the available supply. Similar to the conclusions drawn from the analysis of residential land need, it can be concluded that there is no need for additional employment lands over the 20 year forecast period.

It is clear, however, that some of the employment lands designated by the existing Official Plans and Secondary Plans may not be in a location that will attract additional employers and industries. The City will draw upon its experience over the last 20 years to determine whether or not additional commercial or industrial lands should be designated in other areas to take advantage of transportation or other infrastructure. Also, the existing distribution of infrastructure and the financial implications of infrastructure expansion in some areas of the City may require the reallocation of employment areas in the new Official Plan.

## **3.0 PROPOSED APPROACH**

### **3.1 OFFICIAL PLAN DESIGNATIONS**

The City of Greater Sudbury currently has 13 Official Plans and Secondary Plans affecting lands within its boundaries. This includes the first Official Plan for the Town of Capreol which predates the Regional Official Plan. The original Regional Municipality of Sudbury Official Plan was developed between 1974 and 1978. The Regional Official Plan was amended through the addition of nine Secondary Plans affecting urban areas within the various former municipalities in the City and specific areas around lakes. As well, the City administers that portion of the Official Plan for the Sudbury East Planning area which applies to those areas of the Sudbury East Planning Area that were added to the City of Greater Sudbury in January 2001.

Among these plans are a variety of systems of designating land uses. Also, there is a range of different policy approaches applied to similar situations across the City. Recently, an effort to compare, consolidate and summarize these 13 planning documents has been undertaken in order to provide a sound basis for simplifying the planning process both to facilitate economic development and to set the stage for making the entire plan simpler and more straightforward for the reader. With this in mind, the concept for the new Official Plan is to provide a document with a greatly simplified structure of land use designations. This would be followed up with a broader policy focus

that will enable Council to set out their vision for the future of Greater Sudbury in a manner that can be understood and used to direct growth.

At the present time there are more than 70 different land use designations used in the existing Official Plan documents of the City. Many of these are very similar and can be easily combined. In other cases, the land use classification system is far more detailed than found in modern Official Plans. Newer plans tend to be broader policy documents which provide principles, goals and policies but leave the regulatory details to implementation tools such as zoning by-laws.

At the present time, it is often necessary for an applicant to apply to the City to amend the Official Plan and to amend the zoning by-law to permit a development that has not been anticipated for a given property. It will be an objective of the new Plan to minimize the need for Official Plan amendments by providing appropriate policies to guide rezoning applications as well as give sufficient direction to properly manage growth and development. Where an Official Plan Amendment application can be avoided, applications for development will represent less of an expense to the proponent and can be dealt with in the shortest possible time frame. The key words will be simplicity and flexibility.

## **3.2 SETTLEMENT PATTERN**

The existing Regional Official Plan contains a chapter entitled “Pattern of Development” that establishes a hierarchy of settlements for the Region in Section 3.4 and Table 4. The Plan identifies one Level I growth centre, the former City of Sudbury, six Level II growth centres, six Level III urban settlements and seven non-urban settlements. Non-urban settlements are essentially defined as settlements not serviced by piped water and wastewater systems. The background studies have, in large measure, evaluated how these policies have affected physical development over the past twenty-five years. In short, the policies have achieved an excellent level of choice, have minimized the impacts of development on the natural environment and have ensured the efficient use of scarce municipal resources.

The new Official Plan is being developed in the context of this choice, a continued wish to preserve and enhance the environment, continued limited resources, and, a wish to foster economic development to the greatest degree possible. In addition the Provincial Policy Statement (PPS) provides a context within which municipalities may establish settlement patterns.

Amendments to the Planning Act this year in Bill 26 defined an ‘urban settlement area’ as an area of land designated in an official plan for urban uses including urban areas, urban policy areas, towns, villages, hamlets, rural clusters, rural settlement areas, urban systems, rural service centres or future urban use areas. The intent of the PPS is to focus growth in urban and rural settlement areas with rural areas being the focus of resource activity, recreational uses and other rural land uses.



The general vision of the urban structure for the new City of Greater Sudbury suggests that the former City will continue to be the primary urban center, offering the widest variety of housing and employment opportunities for a large part of Northeastern Ontario. The City will continue to see growth and change in the other settlement areas with water and wastewater capacity, which total 11 of the 12 Level II and III communities. There is capacity within the draft approved subdivisions and designated residential lands in these settlements to accommodate approximately 9,000 more homes.

While the original hierarchy established priorities for investment in infrastructure there is no longer any need to differentiate among the urban settlement areas outside of the former City. All twelve would be considered as urban settlement areas providing a wide range of goods and services for their local populations. The original hierarchy also recognized non-urban settlement areas which were essentially unserved clusters of permanent housing with little opportunity for growth. This designation should be retained along with some opportunity for unserved infill in these areas.



## APPENDIX A

**TABLE A1: POPULATION PROJECTION, 2001 – 2021**

(Source: Community & Strategic Planning Section, City of Greater Sudbury, 01-Mar-03)

Year	Out-Migration	Natural Increase	In-Migration
2001	155,225	155,225	155,225
2002	154,602	155,251	155,251
2003	153,922	155,232	155,232
2004	153,193	155,175	156,149
2005	152,426	155,091	157,055
<b>2006</b>	<b>151,625</b>	<b>154,983</b>	<b>157,954</b>
2007	150,782	154,843	158,838
2008	149,905	154,679	159,713
2009	148,997	154,493	160,582
2010	148,063	154,289	161,447
<b>2011</b>	<b>147,103</b>	<b>154,067</b>	<b>162,307</b>
2012	146,106	153,814	163,149
2013	145,075	153,533	163,974
2014	144,008	153,222	164,778
2015	142,911	152,885	165,567
2016	141,778	152,516	166,331
2017	140,594	152,100	167,054
2018	139,367	151,645	167,745
2019	138,095	151,146	168,397
2020	136,778	150,605	169,012
<b>2021</b>	<b>135,407</b>	<b>150,012</b>	<b>169,579</b>

**TABLE A2: HOUSEHOLD PROJECTION, 2001–2021**

(Source: Community &amp; Strategic Planning Section, City of Greater Sudbury, 01-Mar-03)

Year	Out Migration		Natural Increase		In Migration	
	HHLDS	Avg. HHLDS Size	HHLDS	Avg. HHLDS Size	HHLDS	Avg. HHLDS Size
2001	63,020	2.46	63,020	2.46	63,020	2.46
2002	63,155	2.45	63,374	2.45	63,374	2.45
2003	63,288	2.43	63,735	2.44	63,735	2.44
2004	63,442	2.41	64,128	2.42	64,456	2.42
2005	63,604	2.40	64,537	2.40	65,208	2.41
<b>2006</b>	<b>63,807</b>	<b>2.38</b>	<b>64,993</b>	<b>2.38</b>	<b>66,021</b>	<b>2.39</b>
2007	63,936	2.36	65,384	2.37	66,782	2.38
2008	64,043	2.34	65,760	2.35	67,539	2.36
2009	64,095	2.32	66,085	2.34	68,257	2.35
2010	64,123	2.31	66,391	2.32	68,965	2.34
<b>2011</b>	<b>64,128</b>	<b>2.29</b>	<b>66,679</b>	<b>2.31</b>	<b>69,662</b>	<b>2.33</b>
2012	64,056	2.28	66,894	2.30	70,294	2.32
2013	63,961	2.27	67,090	2.29	70,915	2.31
2014	63,849	2.26	67,272	2.28	71,528	2.30
2015	63,738	2.24	67,460	2.27	72,152	2.29
2016	63,581	2.23	67,604	2.26	72,738	2.29
2017	63,398	2.22	67,726	2.25	73,306	2.28
2018	63,171	2.21	67,806	2.24	73,839	2.27
2019	62,914	2.19	67,863	2.23	74,351	2.26
2020	62,602	2.18	67,867	2.22	74,818	2.26
<b>2021</b>	<b>62,270</b>	<b>2.17</b>	<b>67,857</b>	<b>2.21</b>	<b>75,276</b>	<b>2.25</b>

Base year for population projections: 2001 Census population by single age for Greater Sudbury CSD (City of Greater Sudbury).

Notes:

Natural Increase Scenario: This is a basic projection to demonstrate natural population growth based on births and deaths alone. In this scenario, net migration is assumed to be zero for each year of the projection period from 2002 onwards. Area-specific birth and death rates are utilized (Sudbury RM census division).

Out-Migration Scenario: This scenario assumes that the out-migration trend between 1981 - 2001 will continue. An annual average net migration of -650 is calculated based on 1981-2001 net migration data for Sudbury RM census division and is assumed to be constant over the 20-year projection period.

In-Migration Scenario: This scenario is used as the upper end of population growth in order to assess the adequacy of infrastructure for planning purposes at a return to historic population peak.

**TABLE A3: ACTIVE PLANS OF SUBDIVISION: REMAINING DRAFT APPROVED LOTS AND POTENTIAL UNITS BY AREA, 16-JUL-03**

(Source: Community & Strategic Planning Section, City of Greater Sudbury)

Area	R1 Lots/Units	R2 Lots/Units	R3-R4-R5 Lots/Units	Total Lots/Units
Nickel Centre	220/220	47/94	0/0	267/314
Rayside-Balfour	444/444	21/42	3/120	468/606
Sudbury-Minnow Lake	110/110	131/262	1/176	242/548
Sudbury – New Sudbury	180/180	237/474	5/51	422/705
Sudbury – Old City	0/0	0/0	26/220	26/220
Sudbury – South End	1256/1256	46/92	0/0	1302/1348
Valley East	467/467	37/74	4/19	508/560
Walden	339/339	10/20	0/0	349/359
<b>TOTAL</b>	<b>3016/3016</b>	<b>529/1058</b>	<b>39/586</b>	<b>3584/4660</b>

Notes: Potential residential units based on the number of remaining lots and zoning in place for active plans of subdivision. There are no active plans of subdivision in Capreol, Onaping Falls and the New Townships.

**TABLE A4: CAPACITY BY OFFICIAL PLAN DESIGNATION IN EXISTING OP, 2003**

(Source: City of Greater Sudbury Official Plan)

Area	Potential Units (12 units/ha)
Capreol	210
Nickel Centre (Coniston, Garson, Falconbridge, Wahnapiatae)	1,422
Onaping Falls (Dowling, Levack, Onaping)	1,182
Rayside-Balfour (Azilda/Chelmsford)	3,312
Sudbury (Sudbury, Copper Cliff)	4,860
Valley East	1,944
Walden (Lively, Mikkola/Naughton)	1,548
<b>TOTAL</b>	<b>14,472</b>

**TABLE A5: PROJECTED DWELLING UNIT DEMAND AND SUPPLY, DRAFT APPROVED LOTS AND DESIGNATED LANDS, 2021**

(Source: Community and Strategic Planning Data, City of Greater Sudbury Official Plan, City of Greater Sudbury)

Scenario	Pop. 2021	2021 Demand - Units	2001 No. of Units	Net Unit Demand	20% Outside Urban Areas	5% Infill	Capacity – Units	Net Requirement (excess)
Out-migration	135,407	62,270	63,020	-750	n/a	n/a	19,132	(19,882)
Nat. Increase	150,012	67,857	63,020	4837	967	242	19,132	(14,295)
In-migration	169,579	75,276	63,020	12,256	2,451	613	19,132	(6,876)

Note: Servicing capacity for growth has been assumed not to be a constraint with the growth scenarios as they are projected to meet the demand of all lands designated residential in the Official Plan.

**TABLE A6: DEVELOPMENT OPTION 1 – PERCENTAGE OF 2001 HOUSEHOLDS**

(Source: Community and Strategic Planning Data, City of Greater Sudbury, 2003)

	% Of 2001 Households	Natural Increase	In- Migration
		Option 1	Option 1
Capreol	2.21	107	271
Nickel Centre	7.38	357	905
Onaping Falls	2.97	144	365
Rayside-Balfour	9.03	437	1,107
Sudbury	59.33	2870	7,272
Valley East	12.21	591	1,497
Walden	6.05	293	742
New Townships	.78	38	96
<b>TOTAL</b>	<b>100%*</b>	<b>4,837</b>	<b>12,255</b>

\*Note: May not equal 100% due to rounding.

**TABLE A7: DEVELOPMENT OPTION 2 – PERCENTAGE OF TOTAL GROWTH 1978-2002**

(Source: Community and Strategic Planning Data, City of Greater Sudbury, 2003)

	Total Growth 1978-2002 New Units	1978-2002 % of Total Growth	Natural Increase	In- Migration
			Option 2	Option 2
Capreol	252	1.3%	61	154
Nickel Centre	1446	7.2%	350	886
Onaping Falls	401	2.0%	97	246
Rayside-Balfour	1788	8.9%	432	1,095
Sudbury	11621	58.1%	2,810	7,119
Valley East	3204	16.0%	775	1,963
Walden	1283	6.4%	310	786
New Townships	<i>no</i>	<i>data</i>	<i>available</i>	
<b>TOTAL</b>	20,007	100.0%	4,835	12,249

**TABLE A8: DEVELOPMENT OPTION 3 – PERCENTAGE OF TOTAL GROWTH 1993-2002**

(Source: Community and Strategic Planning Data, City of Greater Sudbury, 2003)

	Total Growth 1993-2002 New Units	1993-2002 % of Total Growth	Natural Increase	In- Migration
			Option 3	Option 3
Capreol	20	0.6%	27	69
Nickel Centre	461	13.0%	629	1,593
Onaping Falls	156	4.4%	213	539
Rayside-Balfour	282	8.0%	385	974
Sudbury	1484	41.8%	2,024	5,128
Valley East	713	20.1%	972	2,464
Walden	419	11.8%	571	1,448
New Townships	12	0.3%	16	41
<b>TOTAL</b>	3,547	100.0%	4,837	12,256

**TABLE A9: POPULATION AND HOUSEHOLD PROJECTIONS BY AREA, CITY OF GREATER SUDBURY, 2003**

Former Town of Capreol Population and Household Projections 2001 - 2021									
Year	Population			Households					
	Out-Migration Scenario	Natural Increase Scenario	In-Migration Scenario	Out-Migration Scenario		Natural Increase Scenario		In-Migration Scenario	
				Households	Avg Hhld Size	Households	Avg Hhld Size	Households	Avg Hhld Size
2001	3,486	3,486	3,486	1,390	2.51	1,390	2.51	1,390	2.51
2002	3,472	3,487	3,487	1,393	2.49	1,398	2.49	1,398	2.49
2003	3,457	3,486	3,486	1,396	2.48	1,406	2.48	1,406	2.48
2004	3,441	3,485	3,507	1,399	2.46	1,414	2.46	1,422	2.47
2005	3,423	3,483	3,527	1,403	2.44	1,423	2.45	1,438	2.45
2006	3,405	3,481	3,547	1,407	2.42	1,434	2.43	1,456	2.44
2007	3,386	3,478	3,567	1,410	2.40	1,442	2.41	1,473	2.42
2008	3,367	3,474	3,587	1,413	2.38	1,450	2.40	1,490	2.41
2009	3,346	3,470	3,606	1,414	2.37	1,458	2.38	1,506	2.40
2010	3,325	3,465	3,626	1,414	2.35	1,464	2.37	1,521	2.38
2011	3,304	3,460	3,645	1,414	2.34	1,471	2.35	1,537	2.37
2012	3,281	3,454	3,664	1,413	2.32	1,475	2.34	1,550	2.36
2013	3,258	3,448	3,683	1,411	2.31	1,480	2.33	1,564	2.35
2014	3,234	3,441	3,701	1,408	2.30	1,484	2.32	1,578	2.35
2015	3,210	3,434	3,718	1,406	2.28	1,488	2.31	1,591	2.34
2016	3,184	3,425	3,736	1,402	2.27	1,491	2.30	1,604	2.33
2017	3,158	3,416	3,752	1,398	2.26	1,494	2.29	1,617	2.32
2018	3,130	3,406	3,767	1,393	2.25	1,496	2.28	1,629	2.31
2019	3,101	3,395	3,782	1,388	2.23	1,497	2.27	1,640	2.31
2020	3,072	3,382	3,796	1,381	2.22	1,497	2.26	1,650	2.30
2021	3,041	3,369	3,808	1,373	2.21	1,497	2.25	1,660	2.29
			Net New Households	-17		107		270	
Source: Community & Strategic Planning Section, City of Greater Sudbury.									
31-Mar-03									

**TABLE A10: POPULATION AND HOUSEHOLD PROJECTIONS BY AREA, CITY OF GREATER SUDBURY, 2003**

Former Town of Nickel Centre Population and Household Projections 2001 - 2021									
Year	Population			Households					
	Out-Migration Scenario	Natural Increase Scenario	In-Migration Scenario	Out-Migration Scenario		Natural Increase Scenario		In-Migration Scenario	
				Households	Avg Hhld Size	Households	Avg Hhld Size	Households	Avg Hhld Size
2001	12,672	12,672	12,672	4,650	2.73	4,650	2.73	4,650	2.73
2002	12,622	12,675	12,675	4,660	2.71	4,676	2.71	4,676	2.71
2003	12,566	12,673	12,673	4,670	2.69	4,703	2.69	4,703	2.69
2004	12,507	12,668	12,748	4,681	2.67	4,732	2.68	4,756	2.68
2005	12,444	12,662	12,822	4,693	2.65	4,762	2.66	4,811	2.66
2006	12,379	12,653	12,895	4,708	2.63	4,796	2.64	4,871	2.65
2007	12,310	12,641	12,967	4,718	2.61	4,824	2.62	4,928	2.63
2008	12,238	12,628	13,039	4,725	2.59	4,852	2.60	4,983	2.62
2009	12,164	12,613	13,110	4,729	2.57	4,876	2.59	5,036	2.60
2010	12,088	12,596	13,180	4,731	2.55	4,899	2.57	5,089	2.59
2011	12,009	12,578	13,251	4,732	2.54	4,920	2.56	5,140	2.58
2012	11,928	12,557	13,319	4,726	2.52	4,936	2.54	5,187	2.57
2013	11,844	12,534	13,387	4,719	2.51	4,950	2.53	5,233	2.56
2014	11,757	12,509	13,452	4,711	2.50	4,964	2.52	5,278	2.55
2015	11,667	12,481	13,517	4,703	2.48	4,978	2.51	5,324	2.54
2016	11,575	12,451	13,579	4,691	2.47	4,988	2.50	5,367	2.53
2017	11,478	12,417	13,638	4,678	2.45	4,997	2.48	5,409	2.52
2018	11,378	12,380	13,695	4,661	2.44	5,003	2.47	5,448	2.51
2019	11,274	12,339	13,748	4,642	2.43	5,007	2.46	5,486	2.51
2020	11,167	12,295	13,798	4,619	2.42	5,008	2.46	5,521	2.50
2021	11,055	12,247	13,844	4,595	2.41	5,007	2.45	5,554	2.49
			Net New Households	-55		357		904	
Source: Community & Strategic Planning Section, City of Greater Sudbury.									
31-Mar-03									



**TABLE A11: POPULATION AND HOUSEHOLD PROJECTIONS BY AREA, CITY OF GREATER SUDBURY, 2003**

Former Town of Onaping Falls Population and Household Projections 2001 - 2021									
Year	Population			Households					
	Out-Migration Scenario	Natural Increase Scenario	In-Migration Scenario	Out-Migration Scenario		Natural Increase Scenario		In-Migration Scenario	
				Households	Avg Hhld Size	Households	Avg Hhld Size	Households	Avg Hhld Size
2001	4,887	4,887	4,887	1,880	2.60	1,880	2.60	1,880	2.60
2002	4,868	4,888	4,888	1,884	2.58	1,891	2.59	1,891	2.59
2003	4,846	4,887	4,887	1,888	2.57	1,901	2.57	1,901	2.57
2004	4,823	4,886	4,916	1,893	2.55	1,913	2.55	1,923	2.56
2005	4,799	4,883	4,945	1,897	2.53	1,925	2.54	1,945	2.54
2006	4,774	4,880	4,973	1,903	2.51	1,939	2.52	1,970	2.53
2007	4,747	4,875	5,001	1,907	2.49	1,951	2.50	1,992	2.51
2008	4,720	4,870	5,028	1,911	2.47	1,962	2.48	2,015	2.50
2009	4,691	4,864	5,056	1,912	2.45	1,971	2.47	2,036	2.48
2010	4,662	4,858	5,083	1,913	2.44	1,981	2.45	2,057	2.47
2011	4,631	4,851	5,110	1,913	2.42	1,989	2.44	2,078	2.46
2012	4,600	4,843	5,137	1,911	2.41	1,996	2.43	2,097	2.45
2013	4,568	4,834	5,163	1,908	2.39	2,001	2.42	2,116	2.44
2014	4,534	4,824	5,188	1,905	2.38	2,007	2.40	2,134	2.43
2015	4,499	4,814	5,213	1,901	2.37	2,012	2.39	2,152	2.42
2016	4,464	4,802	5,237	1,897	2.35	2,017	2.38	2,170	2.41
2017	4,427	4,789	5,260	1,891	2.34	2,020	2.37	2,187	2.41
2018	4,388	4,774	5,281	1,884	2.33	2,023	2.36	2,203	2.40
2019	4,348	4,759	5,302	1,877	2.32	2,024	2.35	2,218	2.39
2020	4,306	4,742	5,321	1,868	2.31	2,025	2.34	2,232	2.38
2021	4,263	4,723	5,339	1,858	2.29	2,024	2.33	2,246	2.38
			Net New Households	-22		144		366	
Source: Community & Strategic Planning Section, City of Greater Sudbury.									
31-Mar-03									

**TABLE A12: POPULATION AND HOUSEHOLD PROJECTIONS BY AREA, CITY OF GREATER SUDBURY, 2003**

Former Town of Rayside-Balfour Population and Household Projections 2001 - 2021									
Year	Population			Households					
	Out-Migration Scenario	Natural Increase Scenario	In-Migration Scenario	Out-Migration Scenario		Natural Increase Scenario		In-Migration Scenario	
				Households	Avg Hhld Size	Households	Avg Hhld Size	Households	Avg Hhld Size
2001	15,047	15,047	15,047	5,695	2.64	5,695	2.64	5,695	2.64
2002	14,986	15,049	15,049	5,707	2.63	5,727	2.63	5,727	2.63
2003	14,920	15,047	15,047	5,719	2.61	5,760	2.61	5,760	2.61
2004	14,850	15,042	15,136	5,733	2.59	5,795	2.60	5,825	2.60
2005	14,775	15,034	15,224	5,748	2.57	5,832	2.58	5,893	2.58
2006	14,698	15,023	15,311	5,766	2.55	5,873	2.56	5,966	2.57
2007	14,616	15,010	15,397	5,778	2.53	5,909	2.54	6,035	2.55
2008	14,531	14,994	15,482	5,787	2.51	5,943	2.52	6,103	2.54
2009	14,443	14,976	15,566	5,792	2.49	5,972	2.51	6,168	2.52
2010	14,352	14,956	15,650	5,795	2.48	6,000	2.49	6,232	2.51
2011	14,259	14,934	15,733	5,795	2.46	6,026	2.48	6,295	2.50
2012	14,163	14,910	15,815	5,789	2.45	6,045	2.47	6,352	2.49
2013	14,063	14,883	15,895	5,780	2.43	6,063	2.45	6,408	2.48
2014	13,959	14,852	15,973	5,770	2.42	6,079	2.44	6,464	2.47
2015	13,853	14,820	16,049	5,760	2.41	6,096	2.43	6,520	2.46
2016	13,743	14,784	16,123	5,746	2.39	6,109	2.42	6,573	2.45
2017	13,628	14,744	16,193	5,729	2.38	6,120	2.41	6,625	2.44
2018	13,509	14,700	16,260	5,709	2.37	6,128	2.40	6,673	2.44
2019	13,386	14,651	16,323	5,685	2.35	6,133	2.39	6,719	2.43
2020	13,258	14,599	16,383	5,657	2.34	6,133	2.38	6,761	2.42
2021	13,126	14,541	16,438	5,627	2.33	6,132	2.37	6,803	2.42
			Net New Households	-68		437		1,108	
Source: Community & Strategic Planning Section, City of Greater Sudbury.									
31-Mar-03									

**TABLE A13: POPULATION AND HOUSEHOLD PROJECTIONS BY AREA, CITY OF GREATER SUDBURY, 2003**

Former City of Sudbury Population and Household Projections 2001 - 2021									
Year	Population			Households					
	Out-Migration Scenario	Natural Increase Scenario	In-Migration Scenario	Out-Migration Scenario		Natural Increase Scenario		In-Migration Scenario	
				Households	Avg Hhld Size	Households	Avg Hhld Size	Households	Avg Hhld Size
2001	85,357	85,357	85,357	37,395	2.28	37,395	2.28	37,395	2.28
2002	85,014	85,372	85,372	37,475	2.27	37,605	2.27	37,605	2.27
2003	84,641	85,361	85,361	37,554	2.25	37,819	2.26	37,819	2.26
2004	84,240	85,330	85,865	37,646	2.24	38,052	2.24	38,247	2.25
2005	83,818	85,283	86,364	37,742	2.22	38,295	2.23	38,693	2.23
2006	83,378	85,224	86,858	37,862	2.20	38,566	2.21	39,176	2.22
2007	82,914	85,147	87,344	37,938	2.19	38,798	2.19	39,627	2.20
2008	82,432	85,057	87,825	38,002	2.17	39,021	2.18	40,077	2.19
2009	81,932	84,955	88,303	38,033	2.15	39,214	2.17	40,503	2.18
2010	81,419	84,843	88,779	38,049	2.14	39,395	2.15	40,922	2.17
2011	80,891	84,720	89,252	38,052	2.13	39,566	2.14	41,336	2.16
2012	80,343	84,582	89,715	38,010	2.11	39,694	2.13	41,711	2.15
2013	79,776	84,427	90,168	37,953	2.10	39,810	2.12	42,080	2.14
2014	79,189	84,256	90,611	37,887	2.09	39,918	2.11	42,443	2.13
2015	78,586	84,071	91,044	37,821	2.08	40,030	2.10	42,814	2.13
2016	77,963	83,868	91,464	37,728	2.07	40,115	2.09	43,161	2.12
2017	77,312	83,639	91,862	37,620	2.06	40,187	2.08	43,499	2.11
2018	76,637	83,388	92,242	37,484	2.04	40,235	2.07	43,815	2.11
2019	75,938	83,114	92,601	37,332	2.03	40,269	2.06	44,119	2.10
2020	75,214	82,817	92,939	37,147	2.02	40,271	2.06	44,396	2.09
2021	74,460	82,491	93,250	36,950	2.02	40,265	2.05	44,667	2.09
			Net New Households	-445		2,870		7,272	
Source: Community & Strategic Planning Section, City of Greater Sudbury.									
31-Mar-03									

**TABLE A14: POPULATION AND HOUSEHOLD PROJECTIONS BY AREA, CITY OF GREATER SUDBURY, 2003**

Former City of Valley East Population and Household Projections 2001 - 2021									
Year	Population			Households					
	Out-Migration Scenario	Natural Increase Scenario	In-Migration Scenario	Out-Migration Scenario		Natural Increase Scenario		In-Migration Scenario	
				Households	Avg Hhld Size	Households	Avg Hhld Size	Households	Avg Hhld Size
2001	22,375	22,375	22,375	7,695	2.91	7,695	2.91	7,695	2.91
2002	22,285	22,379	22,379	7,712	2.89	7,738	2.89	7,738	2.89
2003	22,187	22,376	22,376	7,728	2.87	7,782	2.88	7,782	2.88
2004	22,082	22,368	22,508	7,747	2.85	7,830	2.86	7,870	2.86
2005	21,971	22,356	22,639	7,766	2.83	7,880	2.84	7,962	2.84
2006	21,856	22,340	22,768	7,791	2.81	7,936	2.82	8,061	2.82
2007	21,734	22,320	22,896	7,807	2.78	7,984	2.80	8,154	2.81
2008	21,608	22,296	23,022	7,820	2.76	8,030	2.78	8,247	2.79
2009	21,477	22,269	23,147	7,826	2.74	8,069	2.76	8,334	2.78
2010	21,343	22,240	23,272	7,830	2.73	8,107	2.74	8,421	2.76
2011	21,204	22,208	23,396	7,830	2.71	8,142	2.73	8,506	2.75
2012	21,060	22,172	23,517	7,821	2.69	8,168	2.71	8,583	2.74
2013	20,912	22,131	23,636	7,810	2.68	8,192	2.70	8,659	2.73
2014	20,758	22,086	23,752	7,796	2.66	8,214	2.69	8,734	2.72
2015	20,600	22,038	23,866	7,783	2.65	8,237	2.68	8,810	2.71
2016	20,437	21,984	23,976	7,763	2.63	8,255	2.66	8,882	2.70
2017	20,266	21,924	24,080	7,741	2.62	8,270	2.65	8,951	2.69
2018	20,089	21,859	24,180	7,713	2.60	8,279	2.64	9,016	2.68
2019	19,906	21,787	24,274	7,682	2.59	8,286	2.63	9,079	2.67
2020	19,716	21,709	24,362	7,644	2.58	8,287	2.62	9,136	2.67
2021	19,518	21,623	24,444	7,603	2.57	8,286	2.61	9,192	2.66
			Net New Households	-92		591		1,497	
Source: Community & Strategic Planning Section, City of Greater Sudbury.									
31-Mar-03									

**TABLE A15: POPULATION AND HOUSEHOLD PROJECTIONS BY AREA, CITY OF GREATER SUDBURY, 2003**

Former Town of Walden Population and Household Projections 2001 - 2021									
Year	Population			Households					
	Out-Migration Scenario	Natural Increase Scenario	In-Migration Scenario	Out-Migration Scenario		Natural Increase Scenario		In-Migration Scenario	
				Households	Avg Hhld Size	Households	Avg Hhld Size	Households	Avg Hhld Size
2001	10,101	10,101	10,101	3,815	2.65	3,815	2.65	3,815	2.65
2002	10,061	10,103	10,103	3,823	2.63	3,836	2.63	3,836	2.63
2003	10,017	10,102	10,102	3,831	2.61	3,858	2.62	3,858	2.62
2004	9,969	10,098	10,162	3,841	2.60	3,882	2.60	3,902	2.60
2005	9,919	10,093	10,220	3,850	2.58	3,907	2.58	3,947	2.59
2006	9,867	10,086	10,279	3,863	2.55	3,934	2.56	3,997	2.57
2007	9,812	10,077	10,337	3,870	2.54	3,958	2.55	4,043	2.56
2008	9,755	10,066	10,393	3,877	2.52	3,981	2.53	4,089	2.54
2009	9,696	10,054	10,450	3,880	2.50	4,001	2.51	4,132	2.53
2010	9,635	10,040	10,506	3,882	2.48	4,019	2.50	4,175	2.52
2011	9,573	10,026	10,562	3,882	2.47	4,036	2.48	4,217	2.50
2012	9,508	10,010	10,617	3,878	2.45	4,050	2.47	4,255	2.49
2013	9,441	9,991	10,671	3,872	2.44	4,061	2.46	4,293	2.49
2014	9,371	9,971	10,723	3,865	2.42	4,072	2.45	4,330	2.48
2015	9,300	9,949	10,774	3,858	2.41	4,084	2.44	4,368	2.47
2016	9,226	9,925	10,824	3,849	2.40	4,093	2.43	4,403	2.46
2017	9,149	9,898	10,871	3,838	2.38	4,100	2.41	4,438	2.45
2018	9,069	9,868	10,916	3,824	2.37	4,105	2.40	4,470	2.44
2019	8,987	9,836	10,959	3,809	2.36	4,108	2.39	4,501	2.43
2020	8,901	9,801	10,999	3,790	2.35	4,108	2.39	4,529	2.43
2021	8,812	9,762	11,035	3,770	2.34	4,108	2.38	4,557	2.42
			Net New Households	-45		293		742	
Source: Community & Strategic Planning Section, City of Greater Sudbury.									
31-Mar-03									

**TABLE A16: POPULATION AND HOUSEHOLD PROJECTIONS BY AREA, CITY OF GREATER SUDBURY, 2003**

Former Unorganized Townships Population and Household Projections 2001 - 2021									
Year	Population			Households					
	Out-Migration Scenario	Natural Increase Scenario	In-Migration Scenario	Out-Migration Scenario		Natural Increase Scenario		In-Migration Scenario	
				Households	Avg Hhld Size	Households	Avg Hhld Size	Households	Avg Hhld Size
2001	1,299	1,299	1,299	500	2.60	500	2.60	500	2.60
2002	1,294	1,299	1,299	501	2.58	503	2.58	503	2.58
2003	1,288	1,299	1,299	502	2.57	506	2.57	506	2.57
2004	1,282	1,299	1,307	503	2.55	509	2.55	511	2.56
2005	1,276	1,298	1,314	505	2.53	512	2.53	517	2.54
2006	1,269	1,297	1,322	506	2.51	516	2.52	524	2.52
2007	1,262	1,296	1,329	507	2.49	519	2.50	530	2.51
2008	1,255	1,294	1,337	508	2.47	522	2.48	536	2.49
2009	1,247	1,293	1,344	509	2.45	524	2.47	542	2.48
2010	1,239	1,291	1,351	509	2.44	527	2.45	547	2.47
2011	1,231	1,289	1,358	509	2.42	529	2.44	553	2.46
2012	1,223	1,287	1,365	508	2.41	531	2.43	558	2.45
2013	1,214	1,285	1,372	507	2.39	532	2.41	563	2.44
2014	1,205	1,282	1,379	507	2.38	534	2.40	567	2.43
2015	1,196	1,279	1,386	506	2.37	535	2.39	572	2.42
2016	1,187	1,276	1,392	504	2.35	536	2.38	577	2.41
2017	1,177	1,273	1,398	503	2.34	537	2.37	582	2.40
2018	1,166	1,269	1,404	501	2.33	538	2.36	586	2.40
2019	1,156	1,265	1,409	499	2.32	538	2.35	590	2.39
2020	1,145	1,260	1,414	497	2.30	538	2.34	594	2.38
2021	1,133	1,255	1,419	494	2.29	538	2.33	597	2.38
			Net New Households	-6		38		97	
Source: Community & Strategic Planning Section, City of Greater Sudbury.									
31-Mar-03									