

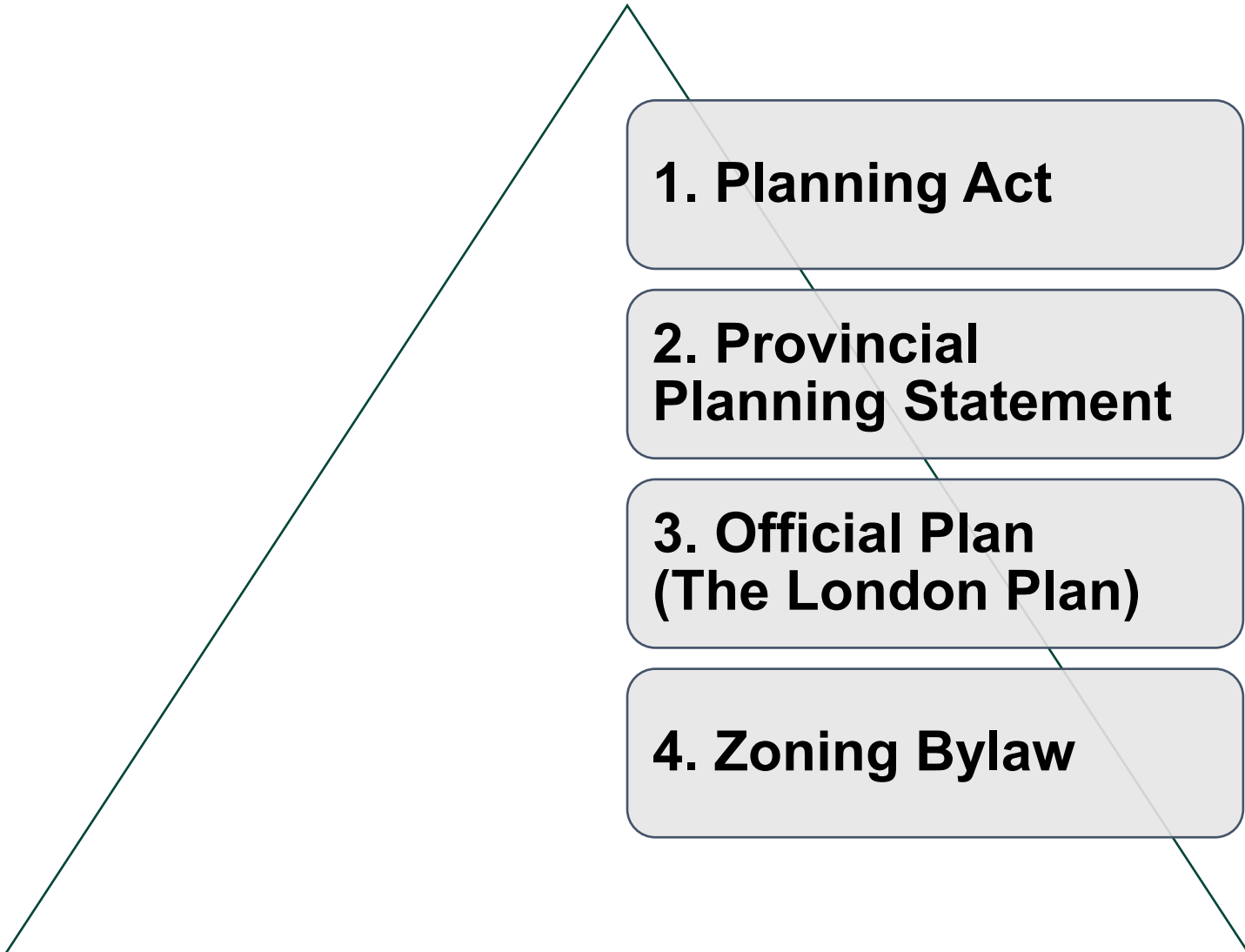


Official Plan Review: Final Industrial Land Needs Assessment and Draft UGB Review Update



Community Information Meeting
September 3, 2025

Provincial Planning Hierarchy



Planning Act, Section 26

- Review required within 10 years of new Official Plan coming into effect, then up to every 5 years after.
- Updating official plan (The London Plan):
 - Conformity with provincial plans;
 - Regard for matters of provincial interest;
 - Consistent with policy statements.
- Permits Land Need Assessment
 - Land required to accommodate projected growth.
 - Can incorporate Industrial land conversions.
 - Land Needs Assessment may result in Urban Growth Boundary (UGB) Review.
 - Expansion of urban area within the municipality.
 - Not an annexation of lands outside the municipality.



Land Needs Assessment Methodology

First, project the long-term population, housing and employment growth of the city

- Housing by Dwelling Type
- Employment by Floor Space

Second, review vacant land supply for capacity to accommodate growth

- Determine if there is enough land designated in *The London Plan*, or if “alternative directions” are required

Alternative directions includes an Urban Growth Boundary (UGB) review



Provincial Planning Statement

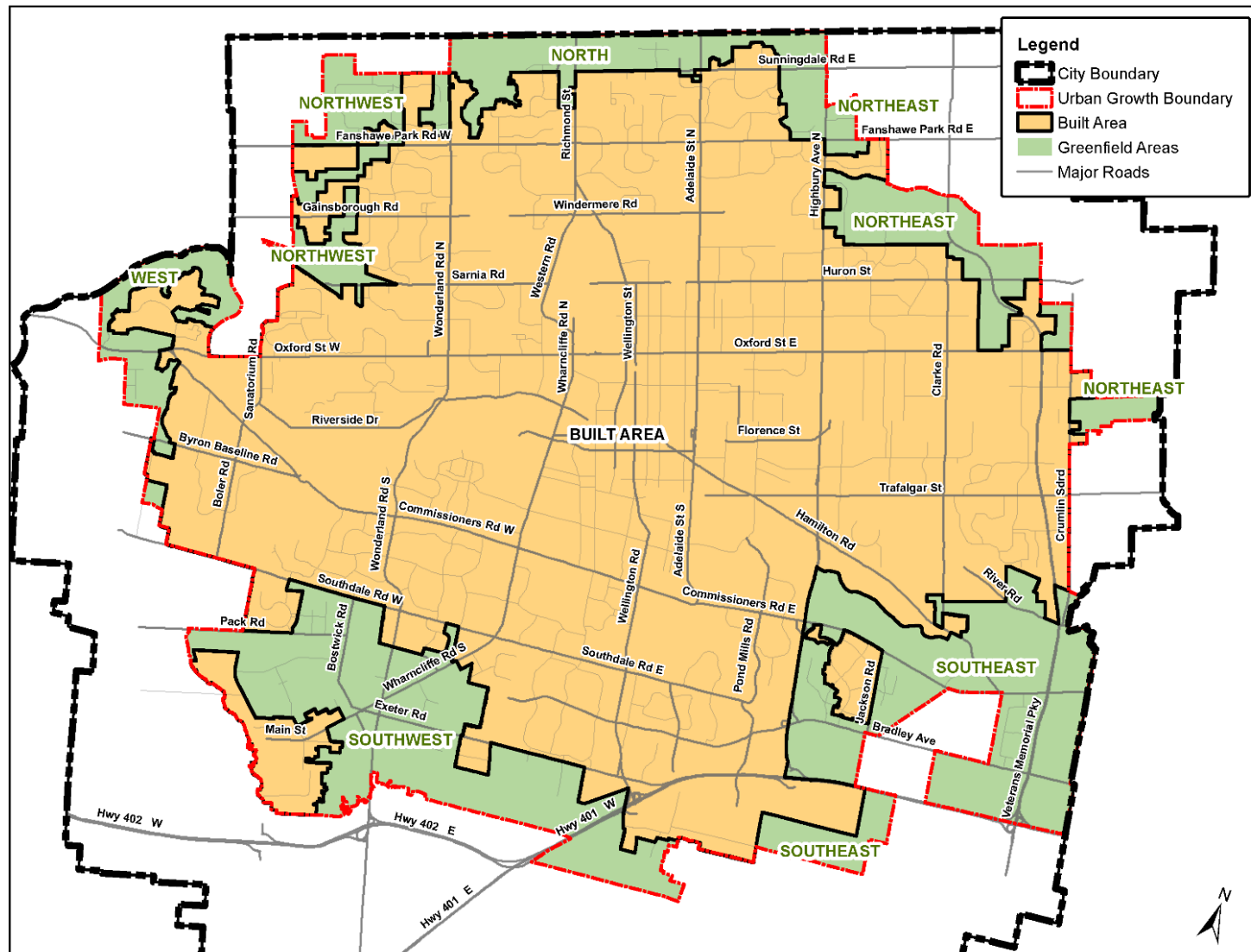
In-force October 20, 2024

Policy 2.1.1

“planning authorities shall base population and employment growth forecasts on Ministry of Finance 25-year projections and may modify projections, as appropriate”

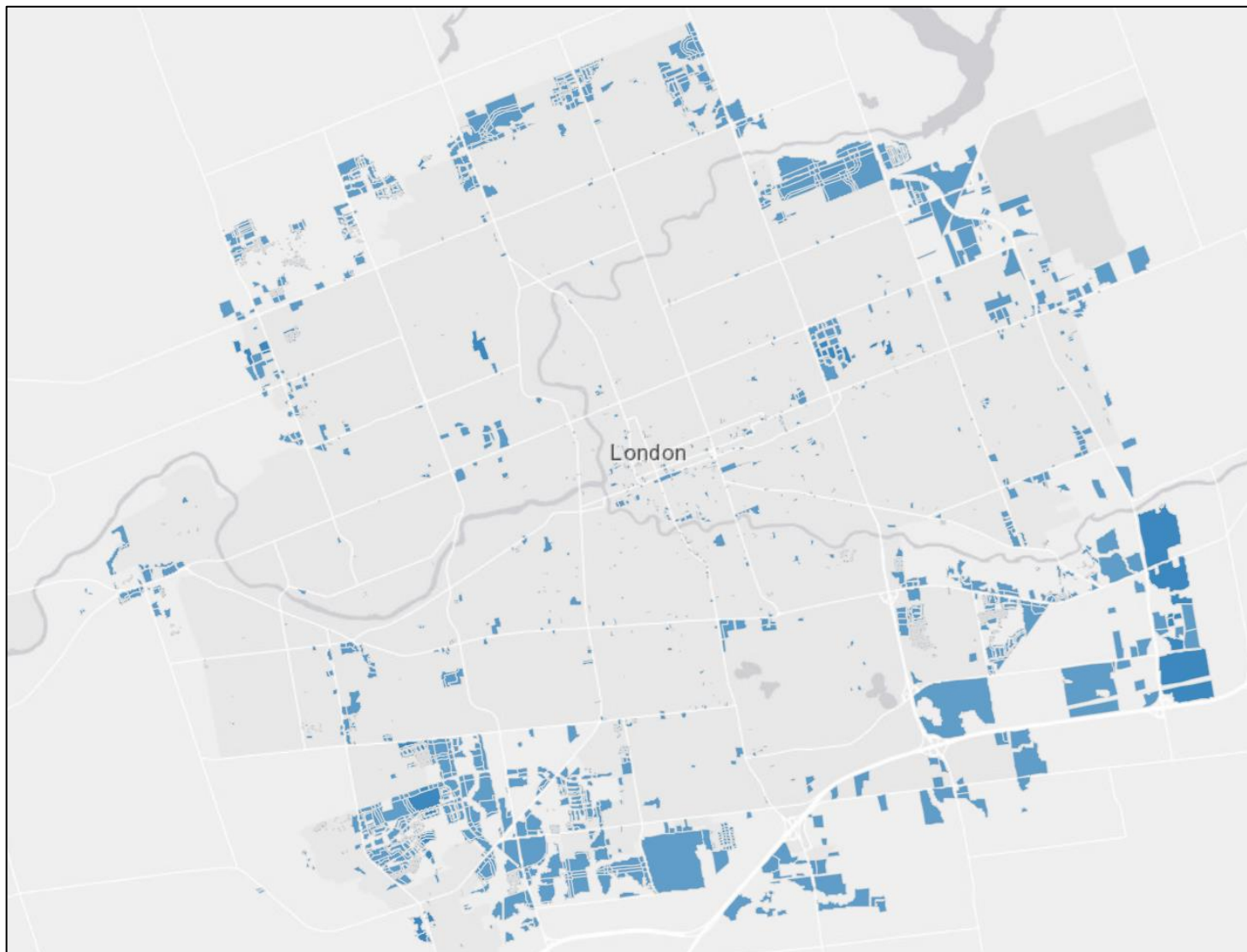
Policy 2.1.3

“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”



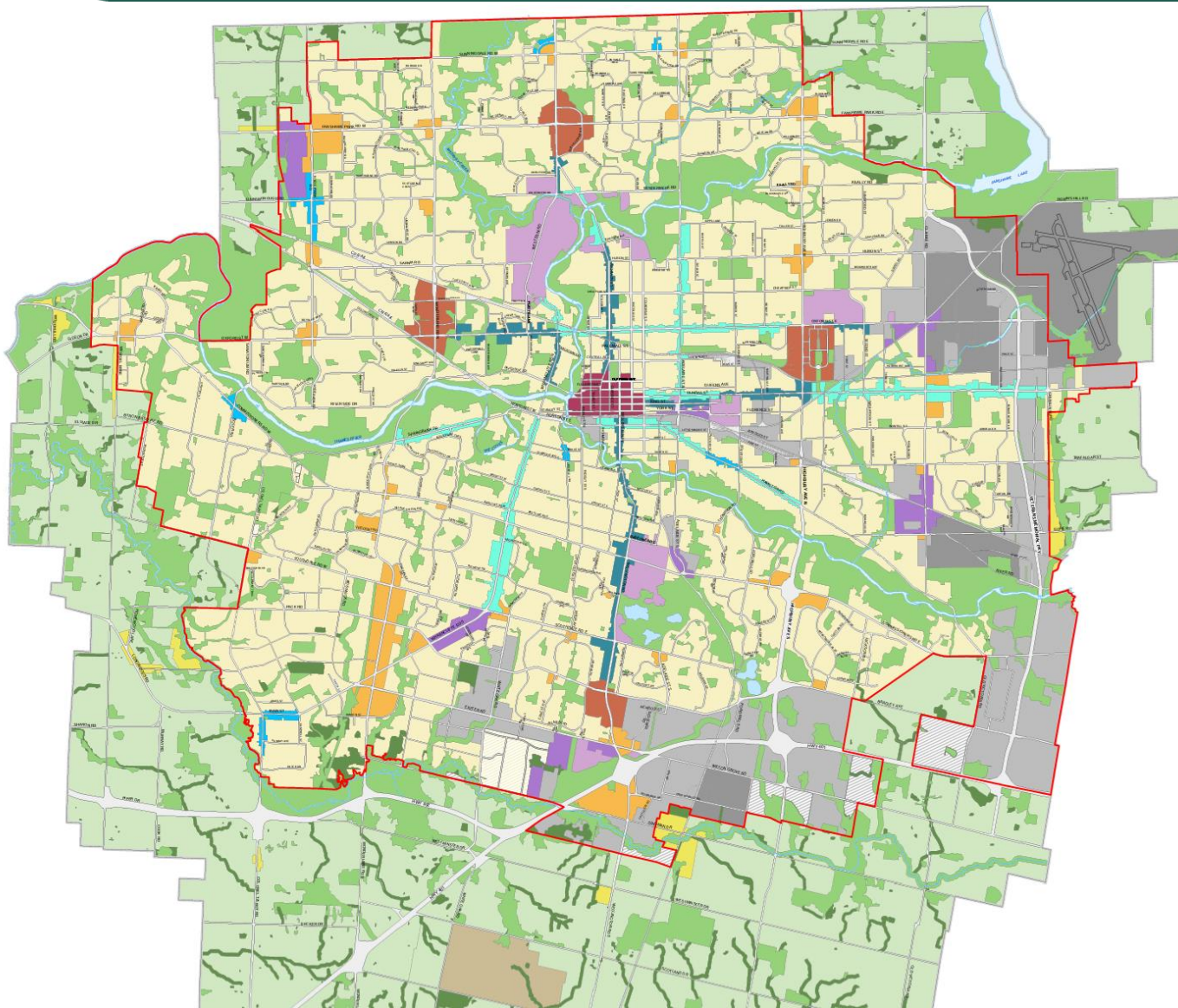
Example of Land Supply

Vacant land supply to support growth or alternative directions for growth



The London Plan

Map 1 – Place Types





Official Plan Review Process - Status

- Phases:
 - Land Needs Assessments (LNA)
 - If required by findings of the LNA, undertake an Urban Growth Boundary Review
 - Other related policy reviews

Land Use	Draft LNA	Final LNA	UGB Review
Community Growth	June 2024	December 2024	Ongoing (Draft June 2025)
Industrial Growth	April 2025	Targeting September 2025 (September 22 PEC)	Ongoing (Draft Targeted Sept 2025)



Final Industrial Land Needs Assessment (ILNA)

September 3, 2025

Introduction

- The ILNA was conducted in parallel with the LNA for Community Growth
- PPS 2024 definition of Employment Areas:
 - “Those areas designated in an official plan for clusters of business and economic activities including manufacturing, research and development in connection with manufacturing, warehousing, goods movement, associated retail and office, and ancillary facilities. [...] Uses that are excluded from employment areas are institutional and commercial, including retail and office not associated with the primary employment use listed above.”

*The Commercial Industrial Place Type is excluded from the definition of employment areas

Industrial Demand

- Employment Growth Rate: 1.5%
- Average Floor Space Per Worker: 111m²
- Floor Area Ratio: 0.23
- Intensification Rate: 25%
- Projected annual gross floor area growth: 67,562 m²
- Resulting demand: 886 hectares total
 - 664 hectares vacant land
 - 221 hectares underutilized land



Industrial Land Supply

Vacant Land Inventory provides the foundation:

Vacant Land – 575 hectares

- The entire parcel has not been previously developed upon for its current planned function and this land is available for new developments

Underutilized Land – 290 hectares

- A portion of an existing developed parcel is vacant. Underutilized land is in excess of what was initially required and is typically retained for use in potential future expansions. Underutilized land is owned by the existing user and is not available to the general market for new developments.
- For the purposes of the ILNA, intensification is considered development that occurs on underutilized industrial land

Discounted Land - Ineligible

Ineligible Land Criteria

1. Included non-conforming Place Types (such as environmental land)

Note: Only the land area of the non-conforming Place Types was removed, the industrial portions were not removed.

2. Converted to other place types through the industrial land conversions

3. Located within the Regulatory Flood Line

4. Located within the Dingman Creek Screening Area

5. Large environmental features eliminated frontage or access to the developable industrial portions of the property, making them unfit for development

6. Are generally small in size and did not meet the minimum Light Industrial zoning requirements of 0.25 acres in area and / or 30 metres frontage (Section 40, Table 40.3, Zoning By-law No. Z.-1)

Note: Parcels that did not meet the zoning requirements but were able to develop contiguously with adjacent parcels (such as those that share common ownership with abutting lands) or will likely be able to develop with a minor variance are not considered ineligible

Discounted Land - Unsuitable

Unsuitable Land Criteria

1. Adjacent to sensitive land uses, such as Residential Place Types (PPS policy 2.8.1.1)
2. More than 1km from any major goods movement corridor, specifically Veterans Memorial Parkway, Highway 401, or Highway 402 (PPS policy 2.8.1.2)
3. Lack of available water or sewer infrastructure, with no plans for service extension to the area (PPS policy 2.8.2.1)

Final Results

Underutilized Land

- Demand: 221 hectares
- Land Supply: 290 hectares
 - 69 hectares surplus

Suitable Land

- Demand: 664 hectares
- Vacant Land Supply: 575 hectares
 - **88 hectares deficit**

5-Year Period	Suitable Vacant Land Required (ha)	Remaining Suitable Vacant Land Supply (ha)
-	-	575
2024-2029	89	486
2029-2034	114	372
2034-2039	110	262
2039-2044	133	129
2044-2049	109	21
2049-2054	109	- 88



Draft Redesignations

Ineligible / Unsuitable Land

- That the Civic Administration BE DIRECTED to undertake a review of Ineligible and Unsuitable industrial lands, as identified through the Draft Industrial Land Needs Assessment (Employment Areas), for **possible** land use redesignation.
- Not all land that has been identified as ineligible or unsuitable will be redesignated, Council's direction is to investigate the potential of these parcels.
- Review of ineligible and unsuitable lands will be undertaken following the UGB Review (targeted for early 2026). Proposed redesignations will be presented to Council for endorsement only after discussion with landowners.



ILNA Next Steps

- Final ILNA and Draft UGB Review to PEC
 - September 22, 2025
- Final UGB Recommendations
 - Targeting Q4 2025
- Consultation on unsuitable / ineligible lands and potential redesignation candidates
 - To be scheduled, likely early 2026



Draft Urban Growth Boundary Review

September 3, 2025



UGB Review Criteria

Based on London Plan policy 76

1. Parcel shapes, size, configuration, topography, and developability for planned urban uses
2. Logical and financially viable servicing of new parcels or areas
3. Logical extension of an existing neighbourhood and/or will be large enough area to accommodate a complete new neighbourhood (Future Community Growth or Future Industrial Growth)
4. Existing and planned infrastructure will be optimized: a logical integration with master servicing strategies
5. Meets the Province's Minimum Distance Separation requirements (for separation between existing livestock operations and new sensitive land uses)
6. Impact on agricultural operations will be minimized, including directing expansions to lower classes of prime agricultural land categories to the extent possible
7. Protection of components of the Natural Heritage System and built heritage
8. Addressing market demands by location of housing, commercial and/or industrial uses that are not well met by the available land supply
9. Alignment with economic development objectives and priorities*

**exclusive to Employment Areas*



UGB Expansion Directions

Dec 2024 - Council Direction to initiate UGB Review for inclusion of approximately 1,476 hectares of developable land (for non-industrial)

- 30-year time horizon
- Maximum permitted under Provincial Planning Statement

Oct 2025 - Pending Council approval of Sept. 22 PEC Report, 88 hectares of expansion for industrial land uses

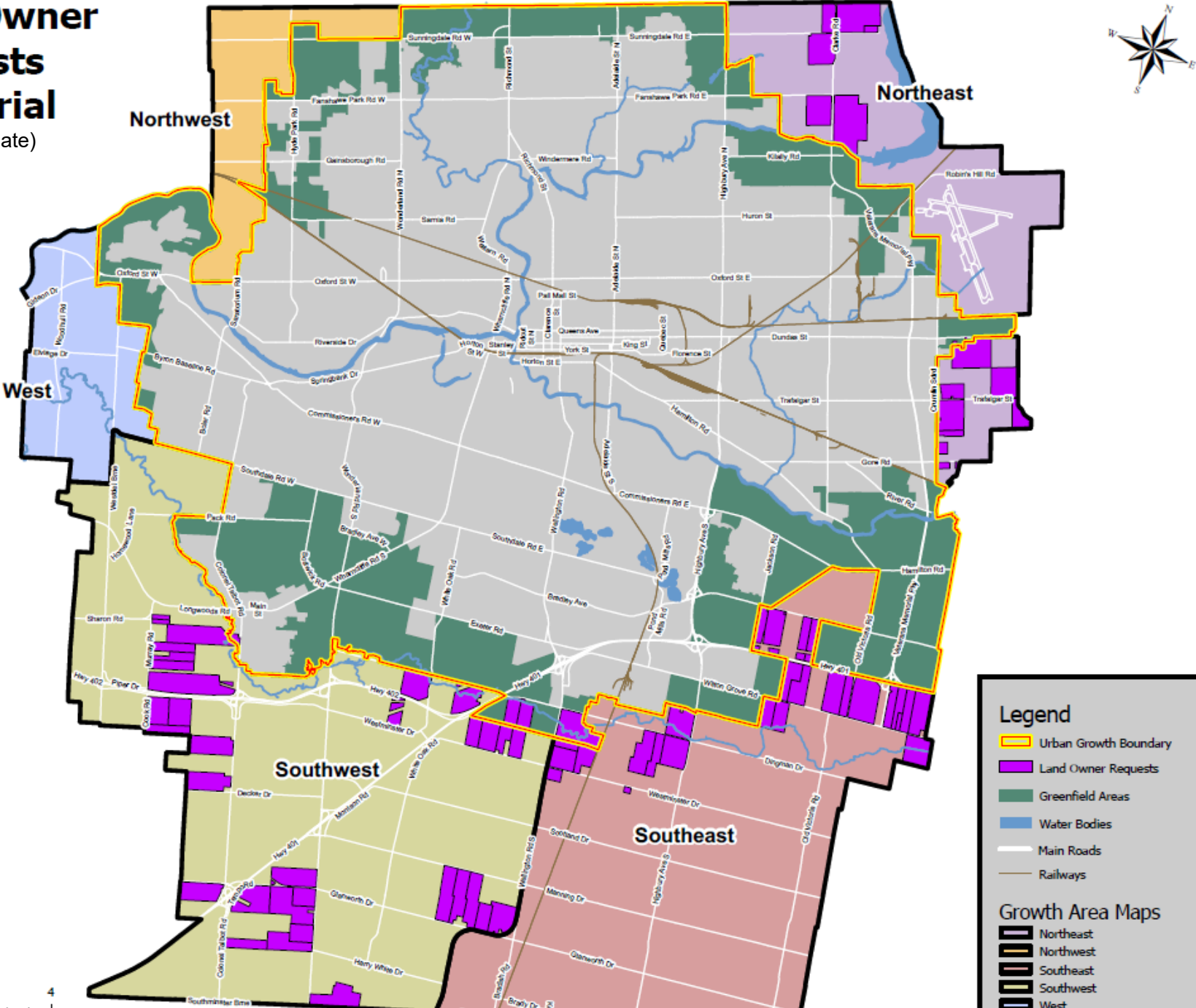


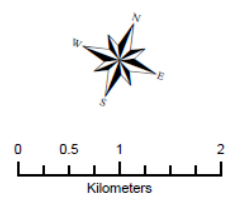
Landowner Requests - Industrial Sites (received to date)

September 3, 2025

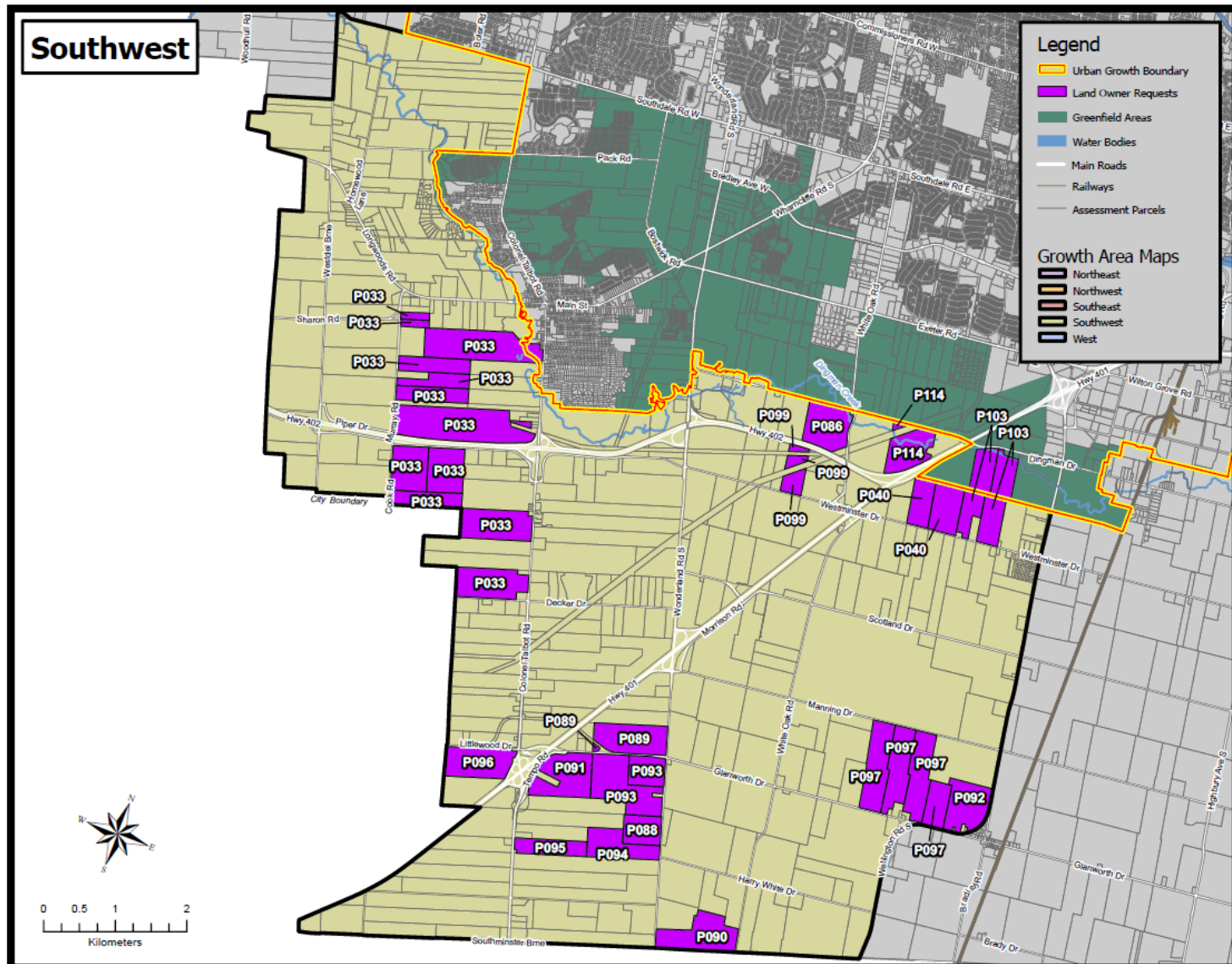
Land Owner Requests Industrial

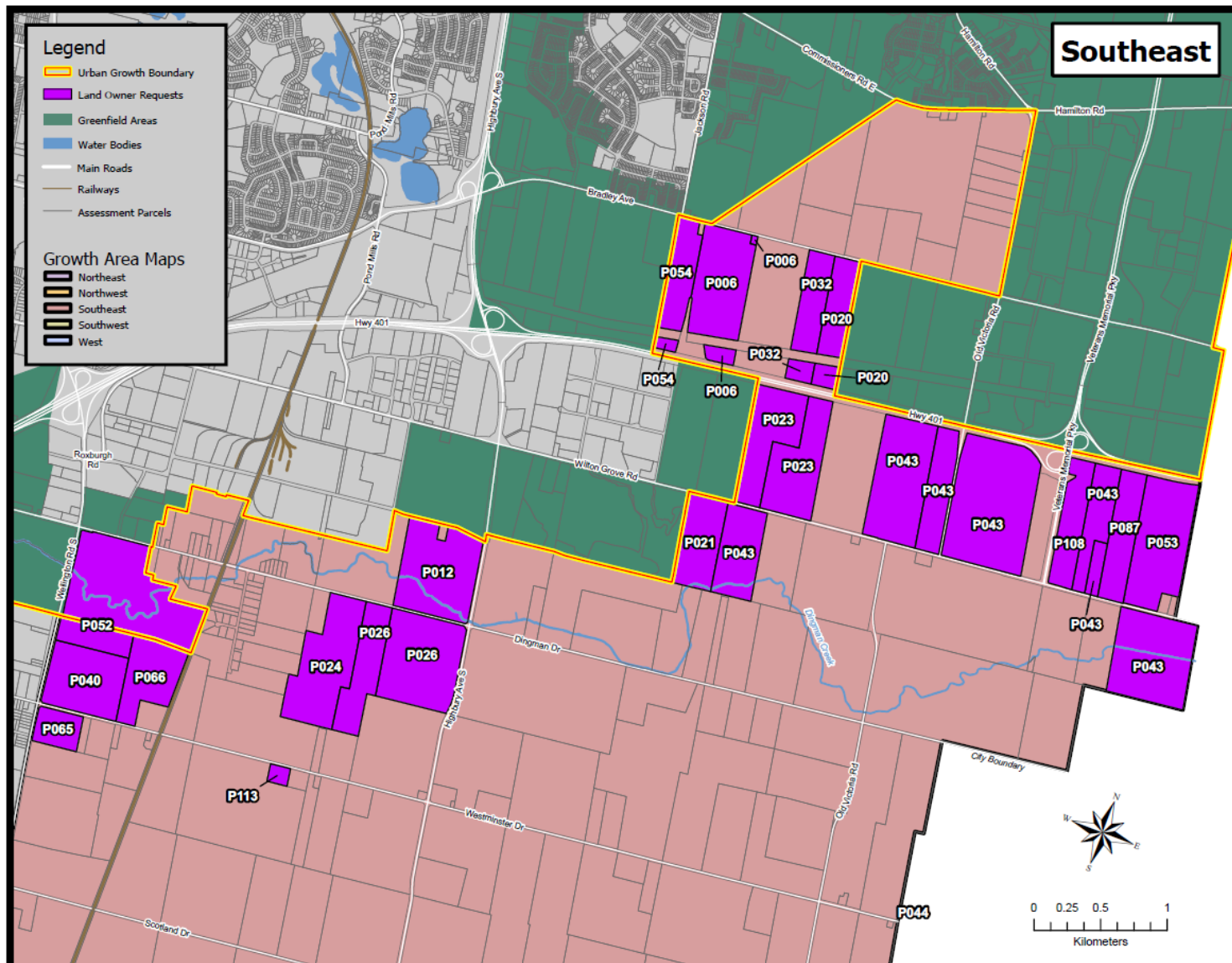
(received to date)





Southwest - Landowner Requests received to date







Site / Area Evaluation: Key Considerations

September 3, 2025



Key factors for draft UGB expansion proposal

- Servicing – ranking of servicing
 - Wastewater treatment plants – relatively costly
 - Requirement for new/upgraded plants
 - Capacity constraints at plants and pumping stations
- Indigenous engagement
- Agriculture: soil classification, and minimum distance separation to buffer between livestock and sensitive land uses (e.g., residential)
- Site / area / development constraints
- Buffering from Natural Heritage System

Servicing Considerations

- Consider speed and certainty of process timing
 - EAs, land acquisition, intergovernmental agreements
- Minimizing of upgrades and costs
- Minimize environmental impact
- Minimize impact on Indigenous communities
- Minimize impact on neighbouring municipalities
- Servicing solution without leapfrogging over sewershed
- Recognize intensification and greenfield development
 - Need for capacity at existing plants and sewer system
- Minimize number of plants being worked on at once

Wastewater Treatment Plant Upgrades – Full Build-out (MOF 2024 Growth)

Magnitude of Cost (\$ Million)



Note: Pottersburg includes decommissioning of Vauxhall plant and “non-growth” component.



Wastewater Treatment Upgrades – Full Build Out

- Greenway capacity primarily reserved for existing built area growth
 - Intensification, Downtown, Rapid Transit Corridors, Shopping Area and other infill opportunities
 - Also serves Southwest area
- Pottersburg includes decommissioning of Vauxhall plant and “non-growth” component
- Plant and pumping station capacity constraints in different urban areas
- Previous “Southside” plant solution had significant concerns related to environmental, project timing, and impacts on Indigenous communities



“Southside” Pollution Control Plant

- Previously refused by Municipal Council
- Servicing for south and west areas of City of London
- Length of time and uncertainty
 - Approximately 5.5 km from plant to outlet in Thames River
 - Requires agreements with County
 - Possible land acquisitions
 - Significant EA and predesign process
 - Significant Indigenous consultation required
- Indigenous communities have expressed deep concerns with sewage and effluent outlets close to their communities along downstream Thames River

Indigenous Engagement

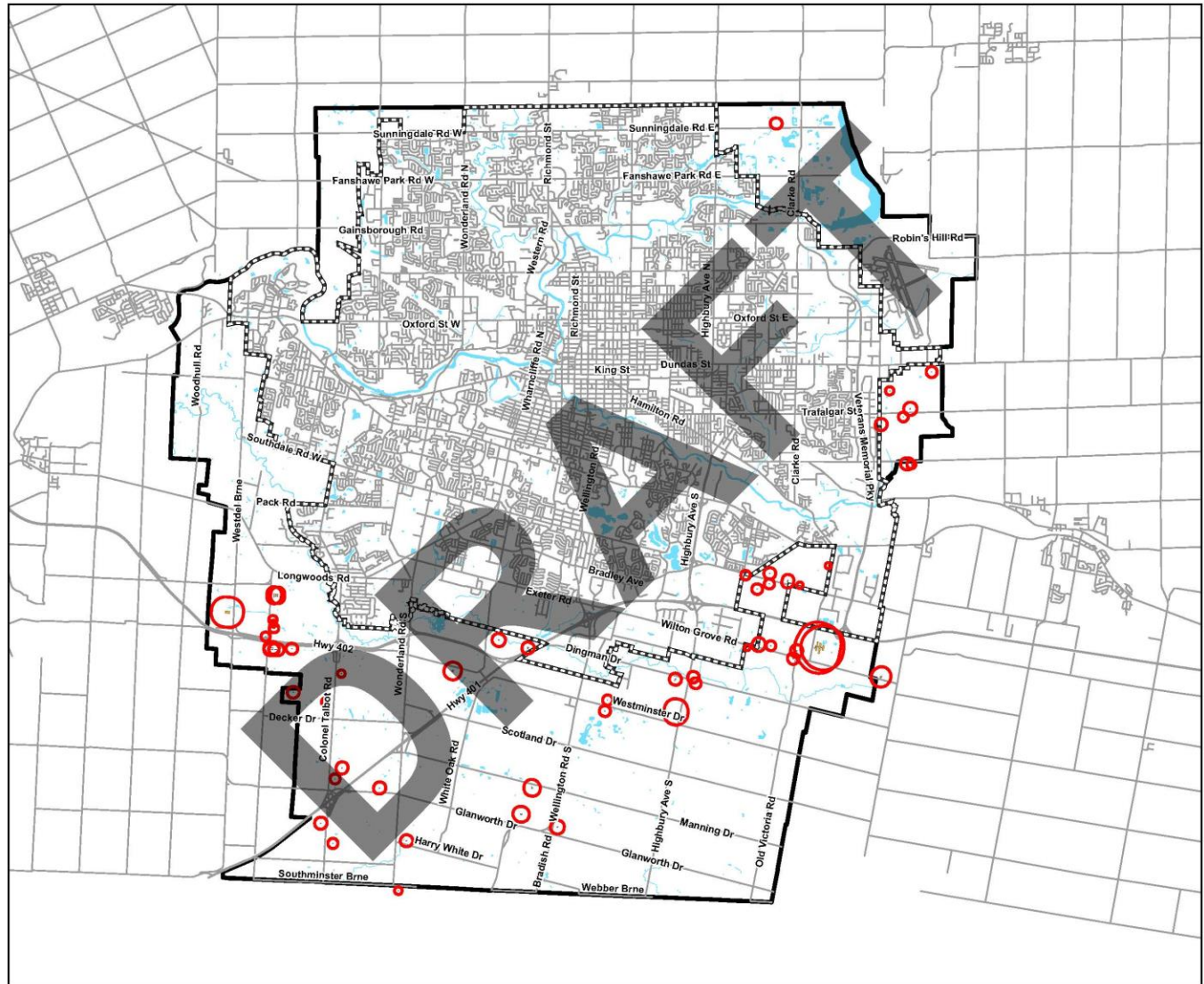
- Meaningful early engagement with Indigenous Communities is required to consider their interests in municipal land use planning processes (*Provincial Planning Statement, 2024*)
- First Nations relationships and meaningful partnerships (ReconciliAction Plan, May 1, 2025 SPPC)

Engagement is ongoing

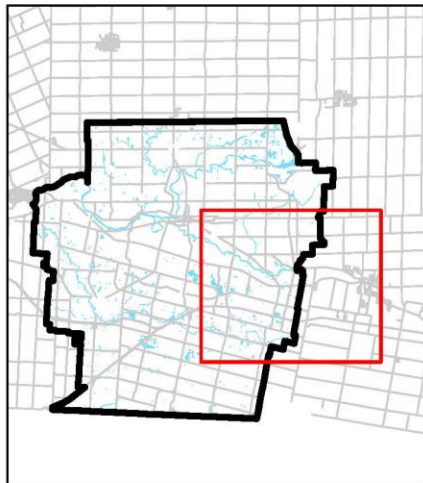
- Significant concerns with westward urban expansion
- Significant concerns with wastewater treatment outlets near Indigenous communities (result of further south / southwest development)
- Letter received for June PEC report – continuing with consultation.



For Continued Consultation

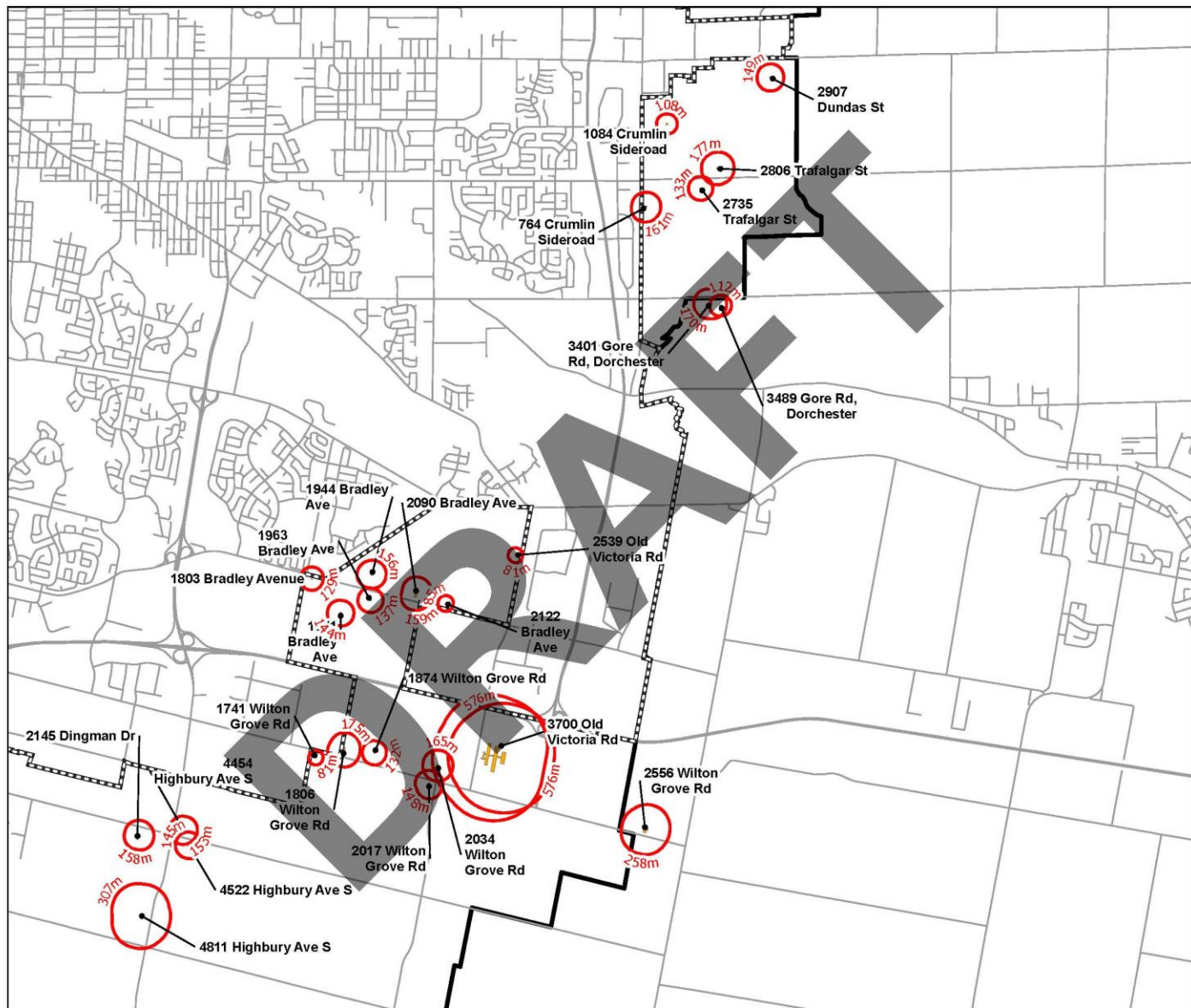


**Preliminary Minimum Distance
Separation (MDS) Calculations:
East
For Continued Consultation**



Legend

- MDS 1 Minimum Distance Separation - Type A
- Barns and Manure Facilities
- Road Network
- Urban Growth Boundary
- City Boundary

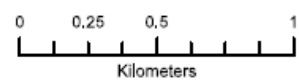
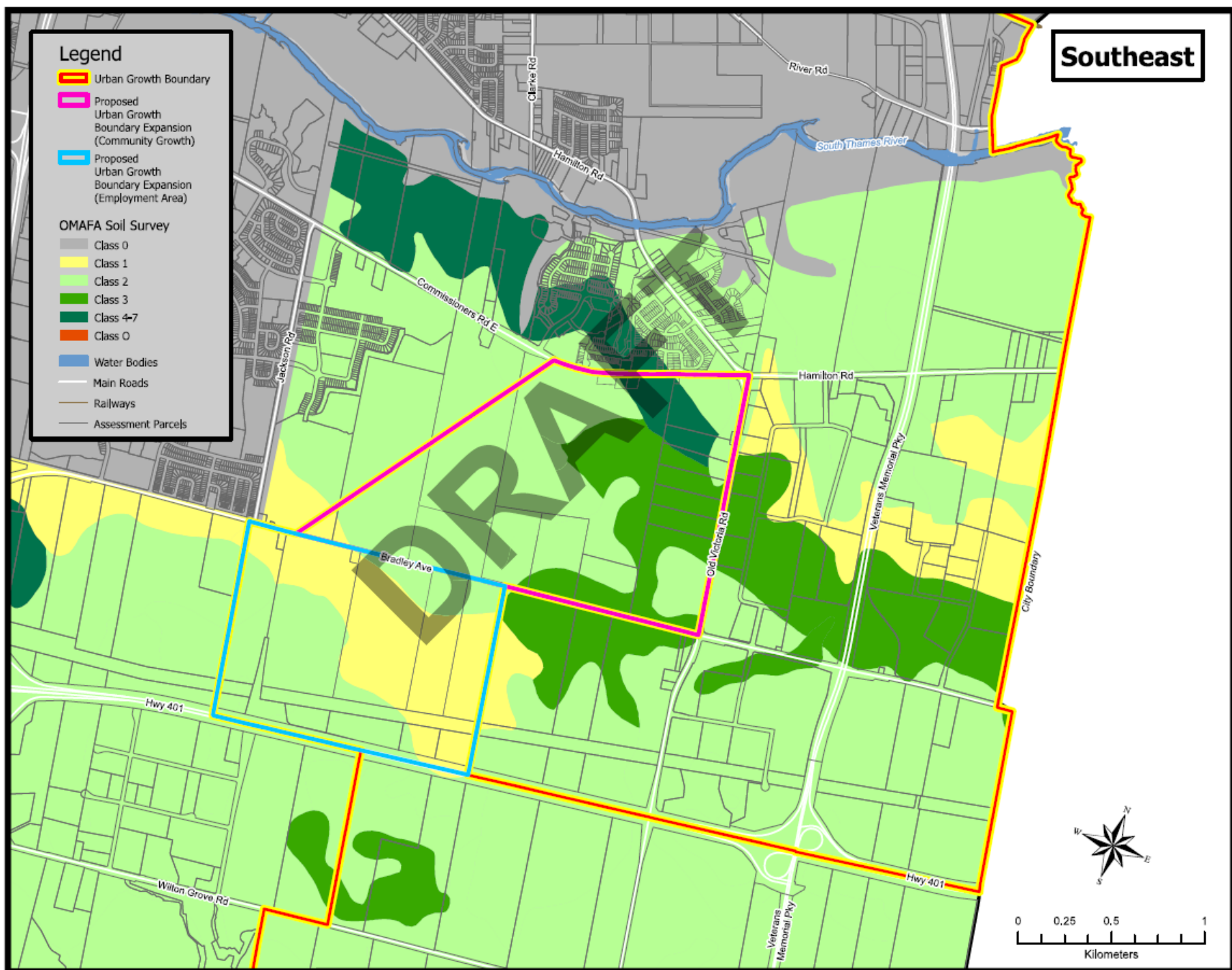


Legend

- Urban Growth Boundary
- Proposed Urban Growth Boundary Expansion (Community Growth)
- Proposed Urban Growth Boundary Expansion (Employment Area)

OMAF Soil Survey

- Class 0
- Class 1
- Class 2
- Class 3
- Class 4-7
- Class O
- Water Bodies
- Main Roads
- Railways
- Assessment Parcels

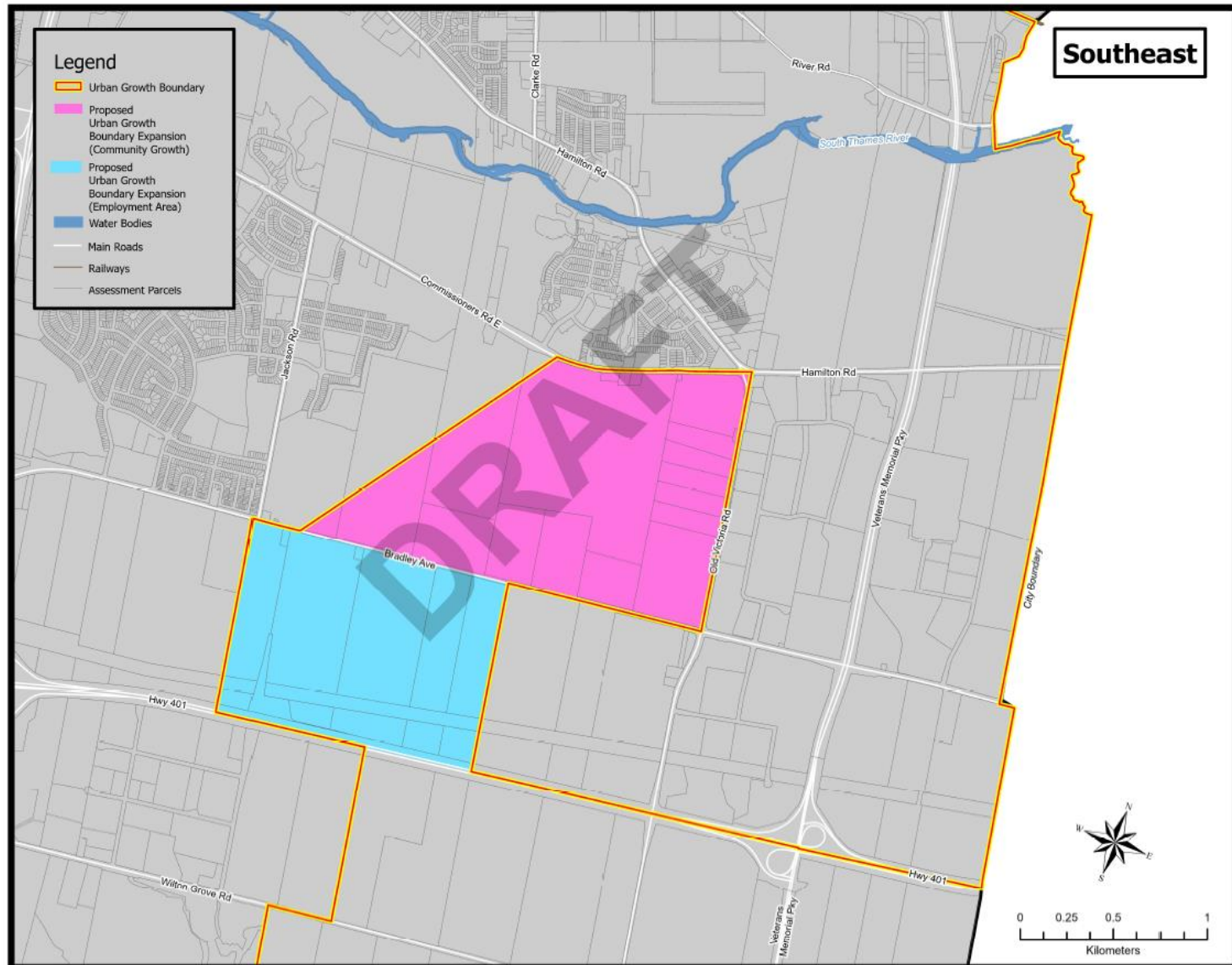




Proposed UGB Expansion (Industrial and Revised Southeast Community Growth) *for continued consultation*

September 3, 2025

Southeast – Proposed UGB (Community Growth and Industrial)





Policy Changes and New Projections Impacting Growth Needs

September 3, 2025



Draft UGB Expansion (Industrial) and Revised Community Growth

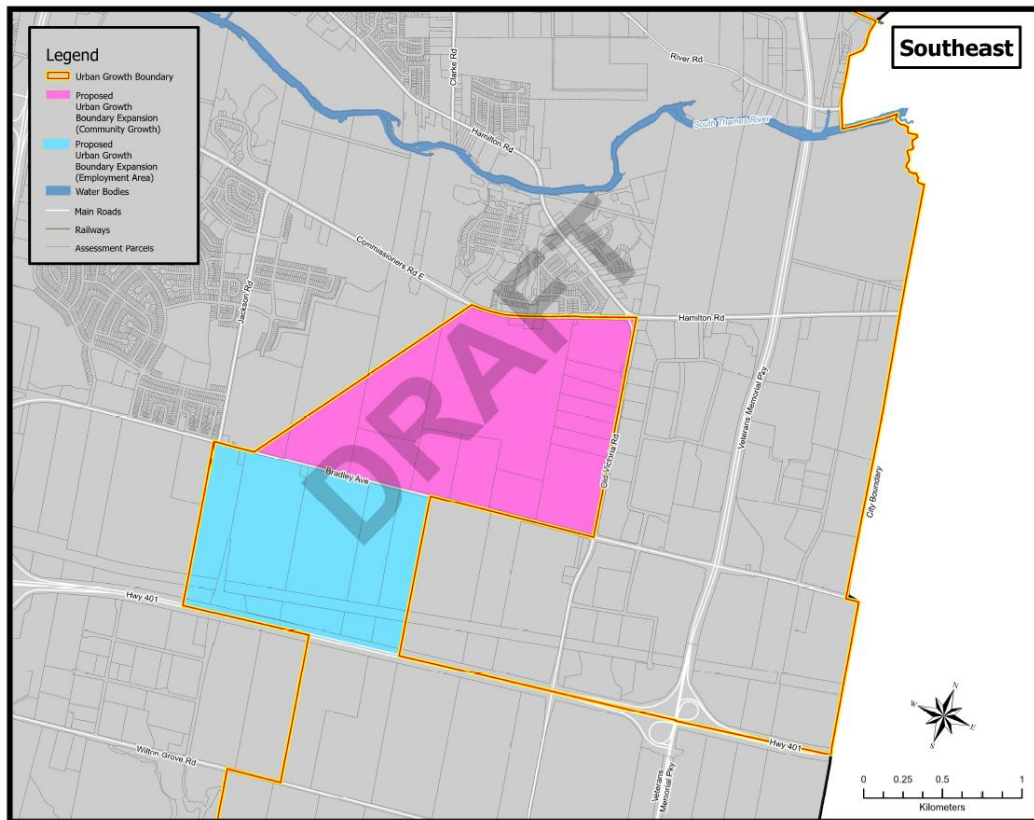
- Draft UGB Expansion for Industrial Land Use
- Revised Draft UGB Expansion for Community Growth in Southeast area
 - Prevents Old Victoria Road “doughnut hole” of Rural or leapfrogging
 - Evaluated and included landowner group request
- **Review is ongoing.** Additional revisions to Community Growth expansion may be considered in other areas outside the Southeast
- Draft calculation of developable area consistent with council-approved Environmental Management Guidelines (July 2025) buffers

Revised Buffer Methodology

Developable area calculation: June draft for Community Growth was based on generalized 20m and 30m buffers for Green Space and Environmental Review

- July 22, 2025 Council approved updated EMG
 - 30m minimum buffers now only apply to most sensitive components of the Natural Heritage System
- Developed feature-based approach using updated EMG minimum buffer widths
- Revised methodology to consider feature-based buffer and 20m buffer.

Revised Draft UGB Expansion



Developable Area:

Employment Areas

20m buffer: 85 ha

EMG-based buffer: 92 ha

Community Growth

*Further review required



Ministry of Finance 2025 Population Projections Update

- Annual release of MOF 25-year projections (July 2025)
- Significant decrease in London population

Total Growth	2024 MOF Increase	2025 MOF Increase	Resulting Change
Population (2024-2054)	272,900	224,600	-48,300
Housing Units (2024-2054)	117,270	97,540	-19,730

- 2025 MOF considers decrease in Federal immigration targets, and lower projected Non-Permanent Residents, net migration, and natural increase



Population Projections Update Resulting Land Need

- Change in required UGB Expansion, 2024 vs. 2025 MOF releases:

Land Use Category	2024 MOF	2025 MOF	Resulting Change
Community Growth	1,476	1,054	-422
Industrial	88	No need for expansion	No need for expansion

- 2024 MOF projections proposed to continue as basis for land needs assessments and UGB Review
- For consistency between LNA studies and recognizing Council Direction on December 17, 2024, related to the adoption of the LNA for Community Growth



Draft Privately Initiated UGB Expansion Application

for continued consultation

September 3, 2025

Purpose

- PPS 2024 and Bill 185
 - Remove Municipal Comprehensive Review prior to settlement area expansion.
 - Permits privately-initiated London Plan Amendment applications for expansion of Urban Growth Boundary.
- Draft amendments for continued consultation purposes.
- The Draft Amendments establish:
 - Complete application submission requirements.
 - New guidelines for a Growth Projection Assessment.
 - Record of Indigenous Consultation as part of complete application.

Draft London Plan Changes

Policy	Change
78 (UGB policy)	Privately Initiated UGB Expansions applications may be supported only where there is a demonstrated need. Expansion is required to meet projected growth over planning horizon and meet Provincial Requirement for minimum land required.
1580	Add Privately Initiated UGB applications as new type of application
1609 (Required Studies)	Growth Projections as a required study. - May be peer reviewed, at applicant expense. - Study and peer review to be prepared by a PLE/RPP at owner expense to satisfaction of City. Documentation that applicant has met with Indigenous Groups. Feedback to be submitted to City.
1722	Add a Guideline document to list in Our Tools.
Glossary	Add definitions for “Official Plan Review” and “Privately Initiated UGB Expansion Application”



Growth Projections Assessment Guidelines

Growth Projection Assessment Content:

1. Evaluating the need for the boundary expansion to accommodate future growth for the defined planning horizon of *The London Plan*.
 - Macro-economic outlook;
 - Employment projections and trends by sector;
 - Population projections by age and sex;
 - Household formation and residential units projections:
 - Allocation modelling by population change in existing and new units;
 - Projection of non-residential space requirements by sector; and
 - Range of Scenarios for the projections described in items above.
2. Evaluating the consistency of the proposed expansion area with *The London Plan*, including the City Structure Plan.
 - Provide: report, describe methodology, graphics, GIS files.
 - Prepared by a Professional Land Economist (PLE) or qualified Registered Professional Planner (RPP)

Next Steps

- September 22 PEC Report
 - ILNA to be presented for Council adoption
 - Draft UGB Review (Industrial/Employment)
 - Draft Privately Initiated UGB Expansion Application
- Fall 2025 – Continued consultation
- Targeting December PEC Report
 - Final UGB Review (Community Growth and Employment Areas)
 - Place Type designation for expansion areas
 - Final Privately Initiated UGB Expansion Application OPA
- Future Reports - 2026
 - Sites for potential industrial redesignation (based on availability/suitability of alternative Place Types)
 - PPS Conformity Review



<https://getinvolved.london.ca/london-plan-review>

September 3, 2025