

Appendix A

Emerging Area Growth Strategy





City Plan Appendix A
Emerging Area Growth Strategy

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Introduction

The City of Brandon (“City”) Emerging Area Growth Strategy identifies where and when growth will occur in alignment with the City Plan growth management policies and capital infrastructure planning. The evaluation of the City’s growth direction builds on previous work, including the Brandon and Area Planning District Fringe Area Growth Strategy (2013) and the Development Charges Capital Plan for Growth (2018). The Reserve Fund Management Policy (2020) reflects these decisions by stating that “growth infrastructure investment shall be prioritized to service development in the south growth area, and that investment should be staged to minimize debt costs to the City.”

The growth strategy identifies three Growth Areas (Established, Emerging and Industrial) as shown on Map 1. The Established and Emerging Areas will develop primarily for residential and non-residential (commercial and institutional) uses, with the majority of industrial uses to be located in the Industrial Growth Area/East Brandon Industrial Secondary Plan Area in the eastern portion of the City:

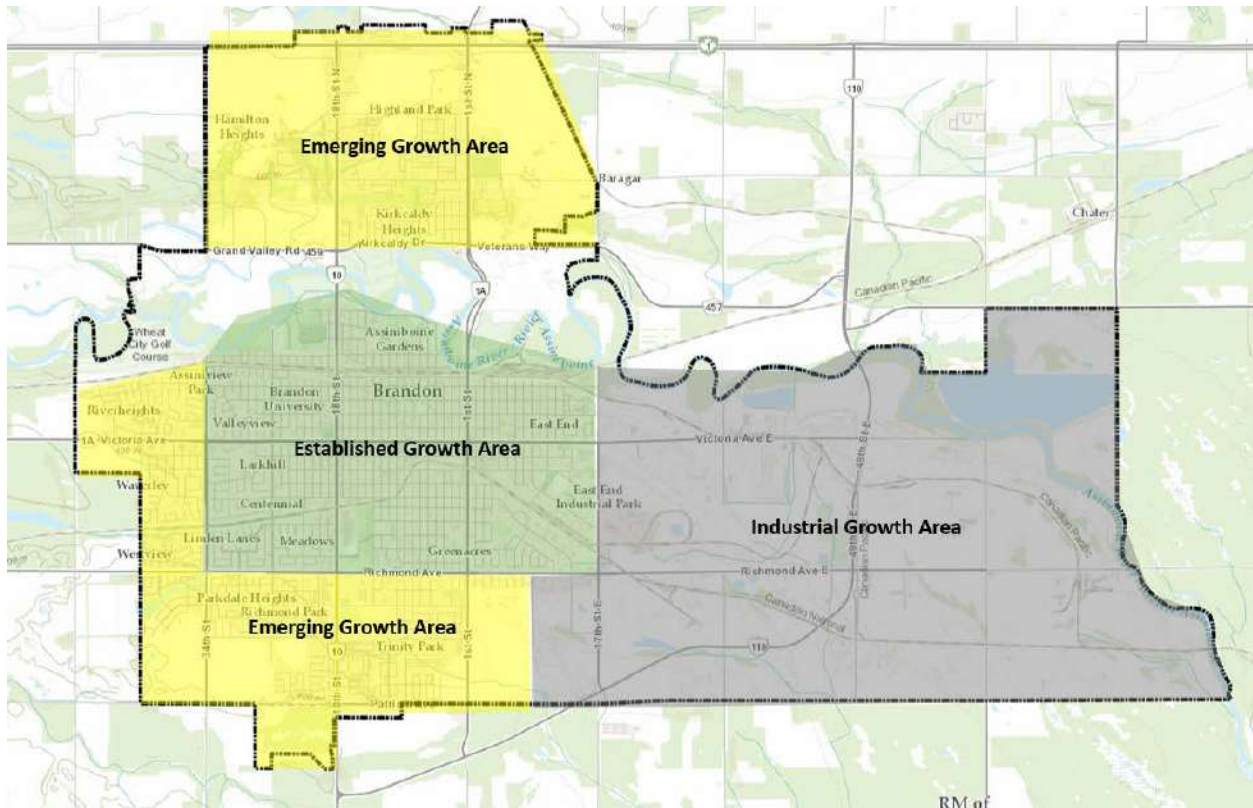
Established: Lands centrally located that are primarily fully developed and serviced by existing infrastructure networks. In the Growth Strategy, “infill” will refer to development within the Established Area, which includes redevelopment, development of underutilized lots, and the conversion of existing buildings, or land between buildings in already-serviced areas.

Emerging: Lands located at the edge of the City that include new development areas that may require improvements to network infrastructure prior to development. Growth in Emerging Areas may occur in greenfield (undeveloped areas without services) and infill areas (with existing services as defined under “Established”).

Industrial: Lands located in the East Brandon Industrial Area Secondary Plan area, portions of which have full or partial services, and others that are neither serviced nor planned to be serviced. The East Brandon Industrial Area Secondary Plan has more information on the Industrial Growth Area.

This Emerging Area Growth Strategy focuses on growth in the Emerging Area, with some references to the Established Area. The City will develop a growth strategy specifically for the Established Area. The East Brandon Industrial Area Secondary Plan already covers industrial growth.

Map 1: Growth Areas



Recent Historical Growth

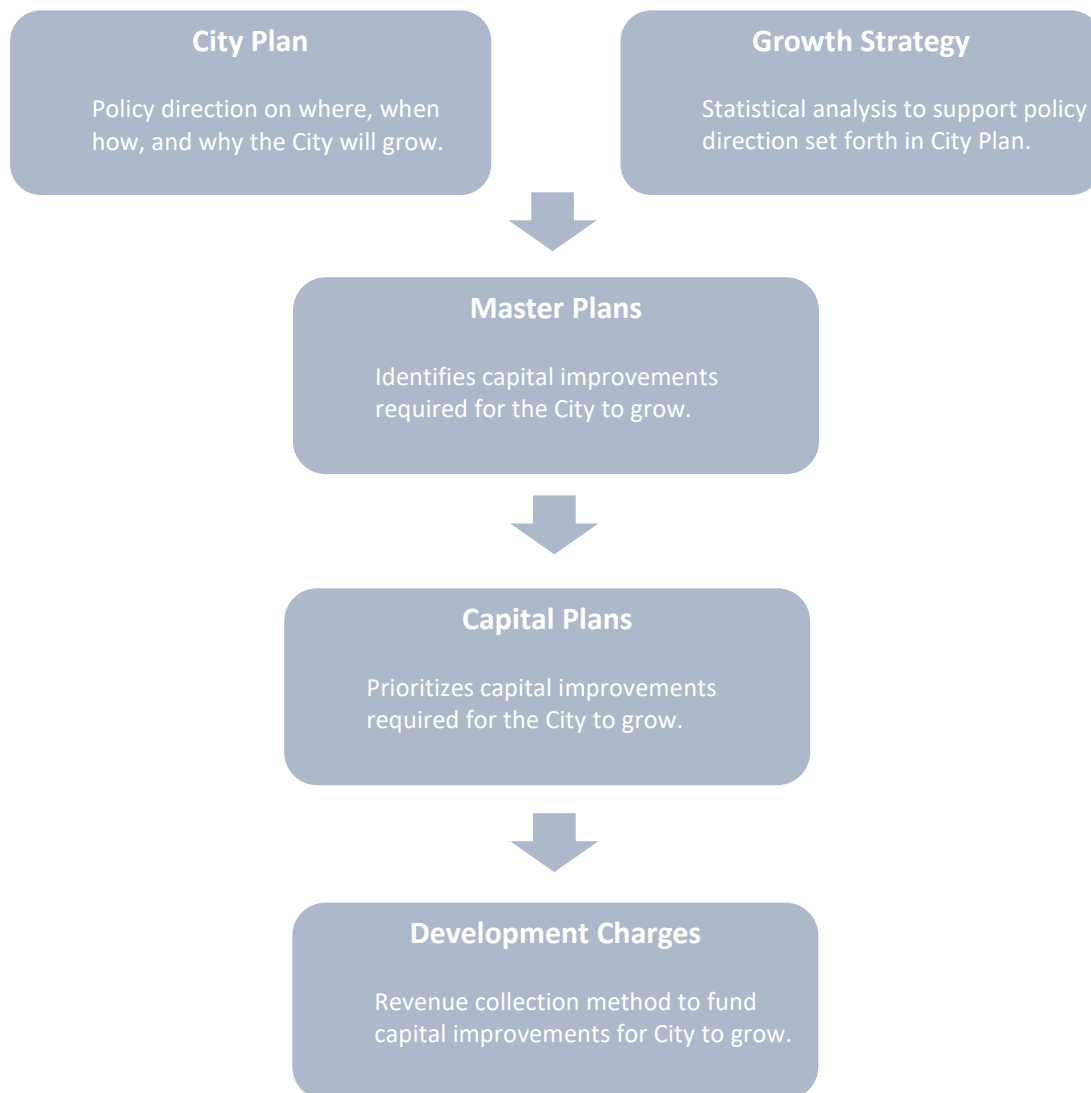
From 2012 to 2021, the City grew from a population of 46,060 to 51,313, an increase of 5,253 total residents (Statistics Canada data), equaling approximately a 1% annual growth rate. Supporting the growth has been the construction of 2,929 total residential dwelling units, 26% of them in the Established Area, and 74% in the Emerging Area. Of the 2,160 total dwelling units constructed in the Emerging Area, 730 (34%) were single detached dwellings, mobile homes, and ready-to-move homes, and 1,434 (66%) were forms of multiple housing, including two unit, row housing, and multi-storey apartment buildings.

Purpose

The Emerging Area Growth Strategy provides statistical direction on where and when Emerging Area growth will occur pursuant to City Plan growth management policies. Identifying the direction and speed of growth allows the City to plan improvements to our assets and services in alignment with growth. The focus of the growth strategy is to coordinate the alignment of core infrastructure (water, wastewater, drainage, transportation) with the direction and speed of growth while recognizing that all City services (recreation, transit, solid waste, fire, police, etc.) must plan for growth.

The growth strategy provides statistical inputs for city-wide and area specific infrastructure modeling and analysis to plan our infrastructure networks to accommodate growth.

Figure 1: Growth Planning Framework



This document will lay out three key components to the growth strategy:

Inventory – How many residential units and how much commercial/non-residential land the City can accommodate. This is including serviced and unserved land. This potentially allows the City to understand at what point more land through such methods as annexation may be required for further growth.

Projections – How much residential and commercial/non-residential development is expected over the next 30 years overall and within the sub-growth areas. Ideally, these numbers will fall within the inventory, an indication otherwise meaning the City may require more land

Growth distribution – How much of this predicted growth will occur in the sub-growth areas of the City (direction of growth) and when this growth is expected (speed of growth). These numbers will inform infrastructure planning.

Review and Update

Annually

- Planning & Buildings to update projected and actual data spreadsheets for both residential and non-residential development using actuals (permits issued)
- Planning & Buildings to prepare annual report for Council and interested parties on the amount and location of development relative to the City Plan policy vision
- Engineering to ensure the timing of improvements in the capital plan for growth align with the location and speed of development
- Engineering to update development charge rates in accordance with the consumer price index

Five Years

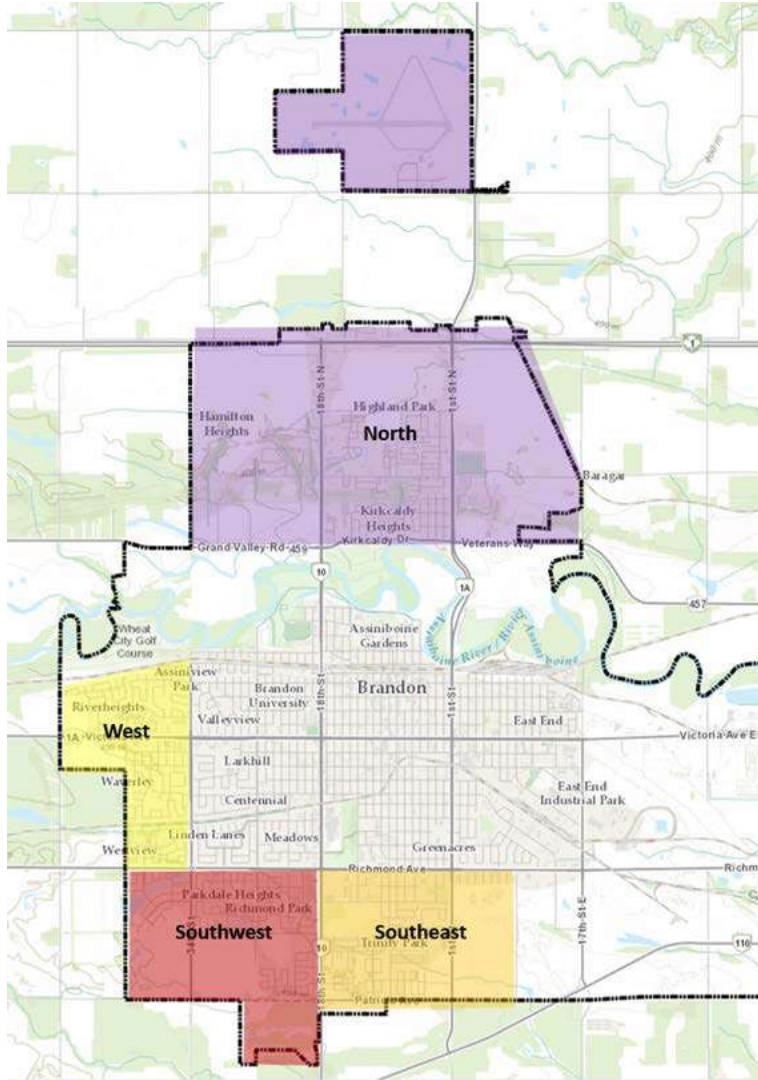
- Planning & Buildings to review previous growth projections relative to federal census data
- Planning & Buildings to coordinate updates to residential and non-residential growth projections using new census data as a baseline
- Planning & Buildings to review and update this growth strategy
- Engineering to review and update infrastructure master plans and capital plan for growth relative to projections and updated growth strategy
- Engineering to review and update development charge rates in accordance with updated capital plan for growth

The growth strategy provides statistical analysis to support capital infrastructure planning. Any change to the vision for Emerging Area growth in the City Plan will require amendments to the growth strategy, infrastructure master plans, and updated financial analysis, including impacts on tax rates, utility rates, and development charge rates for City Council's review and consideration. As the growth strategy is supporting background information for the City Plan, changes and updates may be made by Development Services staff as needed.

Inventory

The emerging growth area inventory includes five sub-growth areas as shown on Map 2.

Figure 2: Emerging Sub-Growth Areas



The Emerging Area development inventory spreadsheet includes residential and non-residential development estimates for each of the sub-growth areas. The development inventory relied on the most detailed information (e.g. secondary plan, neighborhood plan, and subdivisions) available at the time of preparing this strategy. For areas where more detailed planning (e.g. secondary/neighborhood plan) was incomplete, residential density projection used an assumption of 20 units per gross hectare.

The development inventory in Table 2 provides a summary for both residential (dwelling units) and non-residential (sq. ft.) development for each emerging growth sub-area.

Table 1: Emerging Area Development Inventory

Sub-Growth Area	Residential (Dwelling Units)	Non-Residential (Sq. Ft)
North	2,700	1,200,000

West	1,000	230,000
Southwest	3,300	730,000
Southeast	1,800	60,000
Totals	8,900	2,220,000

Projections

Praxis Consulting Ltd. completed residential (units) and non-residential (ha) projections for a base case and high-growth scenarios for a 30-year period included as **Attachment X** to the City Plan. The Praxis study also outlines assumptions for the projections. The growth strategy in turn uses the base case scenario for all projections (demand) calculations.

The City determined the non-residential (ha) projection for the Emerging and Established Areas through a ratio for each non-residential use type that identified the percentage of the use anticipated to occur in the Established and Emerging Areas. These calculations determined that 54% of non-residential land demand (67 ha) would occur in the Established and Emerging Areas.

The base case scenario projects that the City could grow to a population of 62,328 residents by the year 2051 (30-year growth), an increase of 10,443 residents. The projected population increase should in turn mean the construction of 7,636 new dwelling units and 2,516,967 sq. ft. of non-residential development within the Established and Emerging Areas. Table 1 below provides a summary of the projections through five-year growth periods.

Table 2: Growth Demand

Growth Threshold	Total Residential (Units)	Total Non-Residential (Sq. Ft)*
5 Year Total: 2022 - 2025	1,201	418,312
5 Year Total: 2026 - 2031	1,237	423,944
5 Year Total: 2032 – 2036	1,267	422,987
5 Year Total: 2037 - 2041	1,293	418,414
5 Year Total: 2042 - 2046	1,312	419,259
5 Year Total: 2047 - 2051	1,326	414,052
30 Year Total	7,636	2,516,967

*Floor area calculated using an assumed lot coverage of 35%.

Growth Distribution

The growth strategy includes the following assumptions for residential and non-residential growth over the next 30 years:

Residential

- 20% to 30% of the total residential dwelling units (approximately 1,500 to 1,800 units) will occur within the Established Area
- 70% to 80% of the total residential dwelling units (approximately 5,300 to 6,100) of the total growth will occur in the Emerging Area

The growth assumption considers that historical growth (26% established, 74% emerging) will largely continue. From discussions with the development industry, the amount of available land for redevelopment and infill is decreasing as land, demolition, and other redevelopment related costs continue to rise.

The City Plan prioritizes growth of the Established Area, and the City will explore future policy/standard changes to provide flexibility to facilitate development. The City Plan also identifies Corridor intensification (e.g. Victoria, 1st Street) as a priority. The projection considers that any reduction of lower density neighborhood infill will be offset by higher density scale Corridor and downtown intensification.

Non-Residential

- 10% to 20% of the total non-residential building floor area (approximately 250,000 to 500,000 sq. ft.) will occur within the Established Area
- 80% to 90% of the total non-residential building floor area (approximately 2,000,000 to 2,250,000 sq. ft.) will occur within the Emerging Area

The growth assumption considers that there is less land availability in the Established area for non-residential infill compared to residential. Current non-residential vacancy rates suggest that accommodating much of commercial demand within the Established Area will be through occupying existing vacant spaces rather than new construction.

Table 3: Emerging Area Growth Strategy provides a summary for both residential (dwelling units) and non-residential (sq. ft.) development projected for each Emerging Area sub-growth area over the next 30 years. City staff will update the supporting growth strategy spreadsheets annually to identify growth for each sub-area over five-year increments.

Table 3: Emerging Area Growth Strategy

Sub-Growth Area	Residential (Dwelling Units)	% of Total	Non-Residential (Sq. Ft.)	% of Total
North	900 to 1,500	15% to 25%	640,000 to 850,000	30% to 40%
West	300 to 900	5% to 15%	110,000 to 320,000	5% to 15%
Southwest	3,000 to 3,700	50% to 60%	1,050,000 to 1,300,000	50% to 60%
Southeast	900 to 1,500	15% to 25%	110,000 to 320,000	5% to 15%

The capital infrastructure budget for growth will drive development potential for each sub-growth area. Infrastructure modeling and capital planning for wastewater, water, land drainage, and transportation infrastructure are included within their respective master plans, and should align with the direction and speed of growth as identified within the growth strategy.