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MUNICIPALITY OF MISSISSIPPI MILLS

Population Projection 2048 for Economic Development Vision





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1.0 Introduction

The Municipality of Mississippi Mills has had increased development activity for some years and this trend is anticipated to continue. To embrace and accommodate the unprecedented growth opportunity, the Municipality has initiated "MM 2048 - Mississippi Mills".

Under the brand of "MM2048 - Our Community, Our Future", various strategic planning studies are being conducted in parallel using a coordinated and integrated approach, including:

- Economic Development Strategy (How We Prosper)
- Planning Studies (How We Grow)
- Water/Wastewater Master Plan (How We Flow)
- Transportation Master Plan (How We Go)
- Community Services Master Plan (How We Play)
- Solid Waste Management Strategy (How We Dispose)
- Development Charges Background Study (How We Fund)

Using one set of technical input, MM2048 is aiming to achieve:

- Consistent planning horizons
- Consistent baseline population and baseline year for growth
- Consistent population and employment projections
- Consistent and joint public consultation, council reporting and other stakeholder consultation activities
- Consistent and integrated capital planning

This study ("Population Projection 2048 for Economic Development Vision") is to conduct a population analysis and projection for the Municipality and by the Municipality to inform our economic development vision and guide strategic planning. The project team is aware of jurisdictions and relevant legislations in the field and points out this is an economic development analysis, not a planning study.

The Municipality of Mississippi Mills (the Municipality) is a lower-tier municipality in Lanark County (Lanark). Lanark County has a Sustainable Community Official Plan. As per the *Planning Act*, this Upper-Tier plan is required to set the growth projections for its lower-tier municipalities.

Provincial Policy Statement 2020 (PPS), Section 1.4.2 reads:

"Where planning is conducted by an upper-tier municipality: a) the land and unit supply maintained by the lower-tier municipality identified in policy 1.4.1 shall be based on and reflect the allocation of population and units by the upper-tier municipality."

Consistent with the population allocations of the Sustainable Communities Official Plan for the County of Lanark, Mississippi Mills is projected to grow to a population of 21,122 to the year 2038. This allocation represented a 60% increase in the Municipality's population.

A comprehensive review (OPA 22) was recently completed to plan for the Municipality's population allocation in accordance with the policies of the Provincial Policy Statement, the Sustainable Communities Official Plan for the County of Lanark and Mississippi Mills' updated Official Plan (OPA 21). Mississippi Mills' updated Official Plan has a settlement strategy where 70% of future growth is expected to be within Almonte on full municipal services (urban settlement area) and 30% of future growth to rural areas, existing villages with large lots developed on private services or new rural settlement areas with a form of servicing which can support lot sizes of approximately 1,000 to 2,000 square metres (1/4 to ½ acre).

Furthermore, OPA 22 introduced revised densities for Almonte. Greenfield areas (including the new expansion areas brought into the urban boundary) that are generally greater than 4 hectares in size and generally developed by plan of subdivision and/or site plan would include a mix of housing types as per the revised 60/40 split (low density / medium density) with the low densities in the range of 15 to 30 units per net hectare and medium density with a range of 30 to 40 units per net hectare to a maximum of 25 units per net hectare.

Generally, density will be based on a net density approach. However, in certain instances, a gross density approach may be used where the site includes significant environmental features and constraints to protect these. In these situations, it is proposed to apply 10.5 to 21 units per gross hectare for low density areas and 21 to 28 units per gross hectare for medium density areas to a maximum of 19.25 units per gross hectare.

Intensification within the built-up areas (including infill and redevelopment) shall be in accordance with the policies of Section 3.6.7 "Infilling" which considers the built-up character and density. Furthermore, additional residential units are permitted within the urban settlement area.

The purpose of this report is to undertake growth projections using 2021 Census of Population as the starting point and projecting forward 25-years using a similar "trends approach" used as part of OPA 22. These projections will assist with the various master planning projects the Municipality is undertaking.

2.0 Settlement Strategy and Census Data

Per the Lanark County Sustainable Community Official Plan and reiterated in Mississippi Mills' Official Plan Amendment No. 21 (OPA 21) (Five Year Review), Mississippi Mills is projected to grow to a population of 21,122 to the year 2038. This allocation represents a 60% increase in the Municipality's population between 2018-2038 (a 20-year planning horizon).

Mississippi Mills' Official Plan is designed to direct:

- 70% of future growth to Almonte on full services; and
- 30% of future growth to rural areas, existing villages with large lots developed on private services or new rural settlement areas with a form of servicing which can support lot sizes of approximately 1,000 to 2,000 square metres (1/4 to ½ acre).

The Municipality will also be undertaking a review of its Village and Rural policies as part of an Official Plan amendment (OPA 28) and following the upcoming update to Lanark County's Sustainable Community Official Plan. According to the PPS Section 1.6.6.4,

"At the time of the official plan review or update, planning authorities should assess the long-term impacts of individual on-site sewage services and individual on-site water services on the environmental health and the character of rural settlement areas. Where planning is conducted by an upper-tier municipality, the upper-tier municipality should work with lower-tier municipalities at the time of the official plan review or update to assess the long-term impacts of individual on-site sewage services and individual on-site water services on the environmental health and the desired character of rural settlement areas and the feasibility of other forms of servicing set out in policies 1.6.6.2 and 1.6.6.3."

The review will include lot creation and servicing policies for both the Villages, Rural and Rural Settlement Areas with the goal of meeting the Official Plan's targeted growth scenario of 30% of future development within these areas.

According to Statistics Canada, 2021 Census of Population, Mississippi Mills had a population of 14,740 and Almonte [population centre] had a population of 6,098.

A review of Almonte's average household size was derived from Statistics Canada GeoSuite program. The number of dwellings assigned to each parcel depended on the residential primary use assigned to the parcel using the updated MPAC property codes (2020). Based on the number of households per low density and medium density areas and their respective population (per dissemination block) determined an average household size for low density dwellings, medium density dwellings, and retirement homes. The result of this analysis was the following average household sizes:

Table 1: Average Household Size Based on Unit Type and Location

Unit Type and Location	Average household size (persons per household)
Almonte – Low Density Residential	2.29
Almonte – Medium Density Residential	2.54
Almonte – Retirement Home	1.00
Almonte – Adult-oriented units	1.50
Almonte – Additional Residential Units (a.k.a. secondary units)	1.25
Villages	2.4
Rural / Agricultural Areas	2.35

According to our analysis, an average household size of 2.4 persons per household will be used for the purpose of these growth projections.

2.1 Building Permit Activity

According to a review of building permit activity (provided by the Municipality), the average residential permit activity between 2016-2022 was 161 units per year. Of these, an average of 129 units per year were within Almonte, 2 in the Villages, 18 in the Rural areas, and 12 in White Tail Ridge (a rural subdivision). Building permit activity was 72% Urban / 28% Rural/Villages which is in line with the latest 70/30 Settlement Strategy.

Table 2: New Housing Starts

Year	Almonte	Villages	Rural	White Tail (Rural)	Total
2016	91	3	12	8	114
2017	136	2	19	8	165
2018	213	1	16	2	232
2019	144	2	20	0	166
2020	129	1	17	0	147
2021	138	2	23	20	183
2022	55	0	21	46	122
Avg.	129	2	18	12	161
%	80%	1%	11.5%	7.5%	100%

Almonte Urban Area has increased from an average 80 units per year between 2010-2020 to 136 units per year over the past five years. Consistent with OPA 22, this study is projecting an average number of units / permits at 115 units per year for Almonte, between 2023-2048 which represents the 70% Settlement Strategy.

Note, the strategy aims to split 70% of growth to urban areas and 30% of growth to rural areas. However, historical trends in permit activities show that 80% of growth occurs in urban areas and 20% of growth occurs in rural areas.

3.0 Growth Forecast

A 2022 population for Mississippi Mills was developed using projected residential building permit activity of 161 units per year and average household size of 2.4 persons per household. The number of new housing starts was then multiplied by the average household size.

Mississippi Mills' population was estimated to be 15,126 in 2022.

A 2022 population for Almonte was developed using projected residential building permit activity of 115 units per year and average household size of 2.4 persons per household. The number of new housing starts was then multiplied by this average household size.

Almonte's population was estimated to be 6,374 in 2022.

Assuming an average household size of 2.4 people per household and an average residential building permit activity of 115 units per year, Almonte's population is projected to increase to 13,550 by the year 2048.

Table 3: Estimated Almonte Population Based on Trend Analysis

Year	Estimated Almonte Population Based on trend approach assumption of 115 residential housing starts per year at 2.4 persons per household	Estimated Mississippi Mills Rural, Rural Settlement Area and Village Population Based on trend approach assumption of 115 residential housing starts per year at 2.4 persons per household	Mississippi Mills Population Based on trend approach assumption of 115 residential housing starts per year at 2.4 persons per household
2020 (OPA 22)	6,879		
2021	6,098 (per Statistics Canada)	8,642	14,740
2022	6,374	8,752	15,126
2023	6,650	8,863	15,513
2026	7,478	9,194	16,672
2028	8,030	9,415	17,445
2031	8,858	9,746	18,604

2036	10,238	10,298	20,536
2038 (OPA 22)	11,047		
2038	10,790	10,519	21,309
2041	11,618	10,850	22,468
2046	12,998	11,402	24,400
2048	13,550	11,623	25,173

According to Mississippi Mill's Official Plan, 30% of future growth to rural areas, existing villages with large lots developed on private services or new rural settlement areas with a form of servicing which can support lot sizes of approximately 1,000 to 2,000 square metres (1/4 to ½ acre).

Subtracting the Almonte share of Mississippi Mill's population, the rural area (agricultural and rural lands) and existing villages had a population of approximately 8,752. In 2022, this represented approximately 58% of the municipality's population; this share is expected to decline a majority of the growth is planned to occur within the urban settlement area. The following table represents approximate population within each village using census and MPAC data.

Table 4: Estimated Population within Villages (2022)

Village	2022 calculated population
Appleton	237
Clayton	147
Blakeney	113
Pakenham Village	429

According to historical building permits, 1 out of 10 building permits issued outside of Almonte has been within the Villages. Assuming 1,196 new units are expected in the Rural areas and Villages, based on historical permit trends this only represents around 119 permits across all Villages to the year 2048. Rural areas (outside of Villages) are expected to see around 1,076 residential permits to the year 2048 which would result in an overall population growth of 2583 people by 2048, assuming a population density of 2.4 people per unit.

3.0 Projected Housing Demand

Housing demand projections were prepared by applying the average household sizes (per Table 1) to the projected population. OPA 22 had concluded that between 2018 and 2038 some 2,077 units would be required to meet growth projections (average of 115 units per year). Based on updated projections with 2021 Census data as the updated based, Almonte is expected to see 2,877 new housing starts between 2023-2048 based on the trend approach (115 new housing starts per year at 2.4 pph average).

4.0 Employment Projections

This section presents employment projections for the Municipality of Mississippi Mills through to 2048 and for identifying related land requirements in accordance with the PPS.

The following policies are particularly relevant:

- 1.3.1, a) providing for an appropriate mix and range of employment (including industrial, commercial, and institutional) uses to meet long-term needs;
- 1.3.1, b) providing for opportunities for a diversified economic base, including maintaining a range and choice of suitable sites for employment uses that support a wide range of economic activities and ancillary uses, and take into account the needs of existing and future businesses:
- 1.3.1, c) planning for, protecting and preserving employment areas for current and future uses; and
- 1.3.1, d) ensuring the necessary infrastructure is provided to support current and projected needs.

In 2021, there were some 3,160 (up from 1,530 in 2016) employed which worked from home or no fixed workplace address, and an employed labour force of 6,820. In 2021, approximately 49% of the resident labour force worked outside of the Municipality. Those residents not having a Mississippi Mills workplace work in a variety of sectors outside of the area. These sectors include: construction; manufacturing; wholesale trade; retail trade; transportation and warehousing; professional, scientific and technical services; administrative and support, waste management and remediation services; health care and social assistance; accommodation and food services; other services (except public administration); and public administration.

Table 5: Mississippi Mills Place of Work Status

	2016 Data	2021 Data
Total employed labour force 15 years and over	6,605	6,820
Worked at home	710	2,215
Worked outside Canada	20	0
No fixed workplace address	820	945
Worked in Mississippi Mills	1,195	1,250
Worked outside Municipality but within County	695	575
Worked in a different County	3,030	1,800
Worked in a different Province	125	30

Source: Statistics Canada, 2016 & 2021

The methodology used to determine employment growth is based, in the first instance, on an "activity rate", which is defined as the number of jobs in a Municipality divided by the number of residents.

Employment Projection in terms of land needs

Per the Official Plan, employment lands are those lands designated as "Business Park" and "Industrial".

Not all employment will locate on "employment lands" (Business Park and Industrial designated lands). As such, it is necessary to examine the different types of employment in the community to assess land requirements. "Population-serving" jobs (consisting of jobs at businesses serving a local market such as retail, food service, personal service, education, health care and professional jobs) are typically forecasted using a fixed factor of employment to population (the accepted standard is 1 job for every 5 persons). These jobs usually locate throughout the community.

Total Employment / Total Population = Activity Rate

2021 Census of Population	14,740	
Municipal population projection, 2048	25,173	(Assuming 70/30
permit activity @ 2.4 persons per household)		
Activity rate in 2021	52%	
Year 2048 employment projection	13,090	

Approximately 50% of the jobs have been located outside of the Municipality. Furthermore, of the total expected jobs to be in Mississippi Mills, about 20% of these would be "population-serving" jobs which are not necessarily located within "employment lands". Furthermore, there are approximately 5% that are considered 'primary industry' (agriculture, mining) that do not require 'employment lands'. Therefore, there is a projected 3,273 jobs to be located within "employment lands". Employees per gross hectare (Ministry of Municipal Affairs and Housing Projection and Methodology Guidelines) is estimated at 45 jobs / hectare.

Total hectares of 'employment lands' required to accommodate employment is estimated to be 72.7 ha. Majority of 'employment lands' would be in the Almonte settlement area in Business Park and Industrial Subdivisions. Note there are also small industrial parks outside the urban settlement area.

This assumes that approximately 50% of the resident labour force will continue to work outside of the Municipality and 25% would be "population-serving" and/or "primary industry". If the Municipality is successful in retaining its resident labour force, this would represent a need for additional employment lands. Note, this has not assumed post-COVID-19 implications. It is noted that between 2016 and 2021 the share of jobs leaving Mississippi Mills have declined from 57% to 50% and it is expected the work at home share will increase in the 2026 Census (technically not requiring additional employment lands).

5.0 Land Supply

5.1 Residential Land Supply

OPA 22 had identified vacant and/or future development lands to meet growth projections:

- 1. Infill properties (including additional units and redevelopment).
- 2. Greenfield properties (generally greater than 4 hectares and generally developed by site plan and/or plan of subdivision).
- 3. Expansion areas (generally to be developed by phased plans of subdivision).

5.1.1 Residential Intensification and Greenfield Opportunities (Almonte)

In accordance with the PPS, planning authorities shall identify and promote opportunities for intensification (including infill and redevelopment). Identifying potential intensification opportunities within the built-up area of the Municipality is a demanding task. Most infill and intensification type developments occur in areas that are difficult to predict prior to their actual development. However, certain opportunities are evident throughout the built area for infill projects.

ESRI ArcGIS Desktop was used to organize existing GIS data and develop new layers, perform analysis and create figures. MPAC property codes were used to provide each property with residential, commercial, industrial, etc., land use. MPAC properties codes are usually at least six months out of date so property code values were verified and updated using 2016-2020 building permits, draft plans, up-to-date aerial imagery and local knowledge. Parcels with a property code value between 100 and 199 were extracted to create a vacant land layer to show where development could happen. Other farm and large residential properties inside the urban area were looked at as possible properties to include in the vacant land layer. Once the layer was finalized a combined constraint layer of floodplain, ANSI and significant wetlands was used to remove any area in the vacant land layer that would not allow for development.

The vacant land inventory had identified several vacant or underutilized parcels available to support intensification (either through new development or expansion). Within Almonte, there were approximately 14 hectares of vacant or underutilized parcels available to support infilling. Section 3.6.7 Infilling of the COP includes the following policies:

- 1. The Municipality shall give priority to the infilling of existing residential areas as a means of efficiently meeting anticipated housing demand. Infilling shall be considered small scale residential development within existing residential neighbourhoods involving the creation of new residential lots or the development/redevelopment of existing lots.
- Infilling development proposals in existing residential neighbourhoods should be in character with the surrounding building form and setbacks of existing development in an effort to blend in with the residential neighbourhood. Specific design policies for infill development are found in the design section of this Plan (4.2.2. Urban Design).
- 3. Infilling development proposals shall be required to prepare "lot grading and drainage plans" that take into consideration potential drainage impacts on abutting properties.
- 4. Infilling development may be subject to site plan control.

Average net density within the built-up area of Almonte is between 9 (low density) to 15 units per net hectare (medium density) depending on areas. **OPA 22 was approved with a revised housing mix target of 60/40.** Based on the vacant land inventory there was a potential 14 hectares of vacant infill properties which could represent around 76 low density residential (LDR)

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units and 84 medium density residential (MDR) units.

Infill areas in character with established neighbourhoods would represent an average 160 units (OPA 22).

In addition to infilling opportunities within the Urban Area, several large parcels (referred to as "Greenfields") exist within Almonte. These areas are generally greater than 4 hectares in size and generally developed by Site Plan and/or Plan of Subdivision. There are approximately 31 hectares of vacant Greenfield lands within Almonte (OPA 22).

Per OPA 22, net residential area of Greenfield properties (17 ha) would represent an average of 255 low density units and 170 medium density units representing 425 units (25 u.n.ha).

5.1.2 Industrial, Commercial, Institutional Vacant Land Supply

Based on employment projections, it is assumed there will be a need for 3,273 jobs in Mississippi Mills (Employment Lands) by the year 2048. Employment lands include those lands currently designated Industrial and Business Park within Almonte, and could also include certain rural industrial or rural commercial lands that meets the definition of 'employment'.

There is a total of 34 hectares of Industrial lands and 24 hectares of Business Park lands totaling 58 hectares of employment lands. Of these, there is a total of 21 hectares of vacant Industrial lands and 16 hectares of vacant Business Park lands totaling 33.59 hectares of vacant employment lands (after OPA 27).

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6.0 Land Needs Analysis (Supply Versus Demand)

6.1 Residential Supply vs. Demand – 25 years (2048)

According to our projections described above, housing demand in Almonte is estimated to be 2,990 additional units to meet growth targets to the year 2048 (2023-2048).

Table 6: Residential Supply vs. Demand Trend Approach

	Donulation	No. of
Total Population in Almonte (2022)	Population 6,374	Units
Total Population to be Accommodated in Almonte between 2023-2048	7,176	
Total units required to meet growth projections in Almonte between 2023-2048		2,990
2.4 people per household average		
(LDR @ 2.29 people per household & MDR @ 2.54 people per household	usehold)	
Total Projected Lots/Units (Site Plans, Draft / Registered Plans, OPA 22 lands)		
Almonte – Infilling (LDR) @ 9 u/n/ha	174	76
Almonte – Infilling (MDR) @ 15 u/n/ha	213	84
Almonte – 31 ha of Greenfield 60% LDR @ 55% residential	584	255
Almonte – 31 ha of Greenfield (40% MDR @ 55% residential	432	170
Almonte - 430 Ottawa Street (OPA 26) 124 units at 1.5		
persons per unit	186	124
Mill Valley Living (at 1.5 persons per unit)	99	66
Additional Residential Units (aka secondary units, basement apartments, 3 rd unit)		
10 per year assumption (at 1.25 persons per unit)	313	250
Area 1 - revised ("Sonnenburg Lands") per discussions with developer	1,200	500
Area 2 ("Houchaimi Lands") per discussions with developer	1,200	500
Area 3A ("Henry Lands") 25.1 ha per OPA 22	828	345
Area 4 ("Mill Run Extension") 8.9 ha per OPA 22	293	122
Total	4,322	2,492
Population left to be accommodated and units required (assuming 2.4 pph)	1,195	498

36.5 hectares (assuming 55% residential = 20 ha) new urban settlement area lands are being proposed for a mix of housing types at an average maximum of 25 units per net hectare (20 ha * 25 u.n.ha.) = \pm -498 units (299 LDR / 199 MDR) which could accommodate approximately 1,195 people to the year 2048 (@ 2.4 pph).

6.2 Employment Supply vs. Demand – 25 years (2048)

Based on an assumed 45 employees per hectare (as recommended by the Ministry's simplified employment projections methodology), there is a need for approximately 72.7 hectares of employment lands. There is therefore a shortfall of 14.7 hectares of employment lands.

There are therefore not enough designated employment lands to meet growth projections to the year 2048. As noted above, future employment lands could also include Rural Industrial lands and other employment opportunities throughout the Villages.

However, if the Municipality is successful in retaining a larger portion of its resident labour force, there may be a need for even more employment lands.

7.0 Future Economic Development

Expanding the land base, or amount of land that is available for development, is essential for economic growth as it enables the construction of new commercial and residential properties, parkland, transportation infrastructure, and other vital amenities.

Land expansion, land financing, and economic development are three interconnected concepts that play a pivotal role in shaping a region's growth. Economic development relies heavily on land expansion and land financing to promote the development of new industries, businesses, and infrastructure. This interaction between these concepts is vital to ensure economic growth, job creation, and an improved standard of living for the local population.

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8.0 Conclusion

Based on the analysis set out in this Report, and consistent with the Provincial Policy Statement, the current Settlement Area (as amended by OPA 22) does not have sufficient lands, either through intensification or development of designated and available growth areas, to accommodate an appropriate range and mix of housing to meet projected needs to 2048.

In order to accommodate 70% of the expected growth between 2023 and 2048 within Almonte, (as per OPA 21 and OPA 22), it is expected that an additional 498 new units would be required. It has been assumed (and adjusted based on recent discussions with developers) that 2,492 units would be available through infill, additional residential units, lots either draft approved or registered for residential development and future development within recently approved urban settlement areas (OPA 22).

OPA 22 concluded that Area 1 - revised ("Sonnenburg Lands") 17 ha, Area 2 ("Houchaimi Lands") 21.9 ha, and Area 3A ("Henry Lands") 25.1 ha, and Area 4 ("Mill Run Extension") 8.9 ha be approved as urban lands. These areas represent approximately 72.9 hectares of land and are sufficient to meet growth projections to the year 2038. In terms of employment lands, the municipality has a shortfall of 14.7 hectares of employment lands however this could be accommodated both in the urban settlement area, villages, and rural industrial subdivisions.

This Growth Forecast Study will be used for a variety of ongoing Master Plans, future Official Plan Amendments, and the Development Charges By-law Study to provide a basis for future growth management for Mississippi Mills to 2048.

This report has been prepared for the exclusive use of the Municipality of Mississippi Mills, for the stated purpose, for the named facility. Its discussions and conclusions are summary in nature and cannot be properly used, interpreted or extended to other purposes without a detailed understanding and discussions with the client as to its mandated purpose, scope and limitations.

This report was prepared for the sole benefit and use of the Municipality of Mississippi Mills and may not be used or relied on by any other party without the express written consent of J.L. Richards & Associates Limited.

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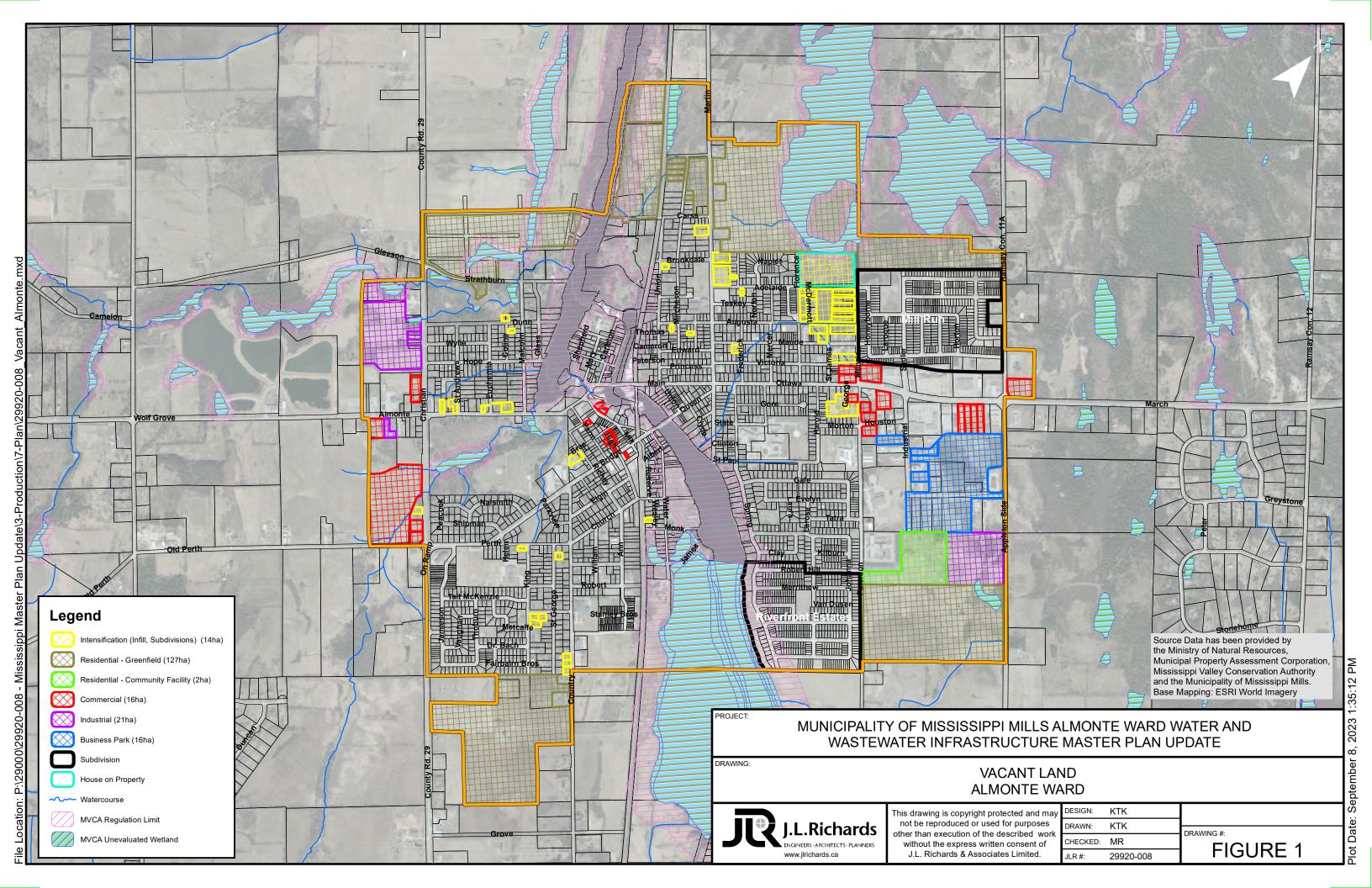
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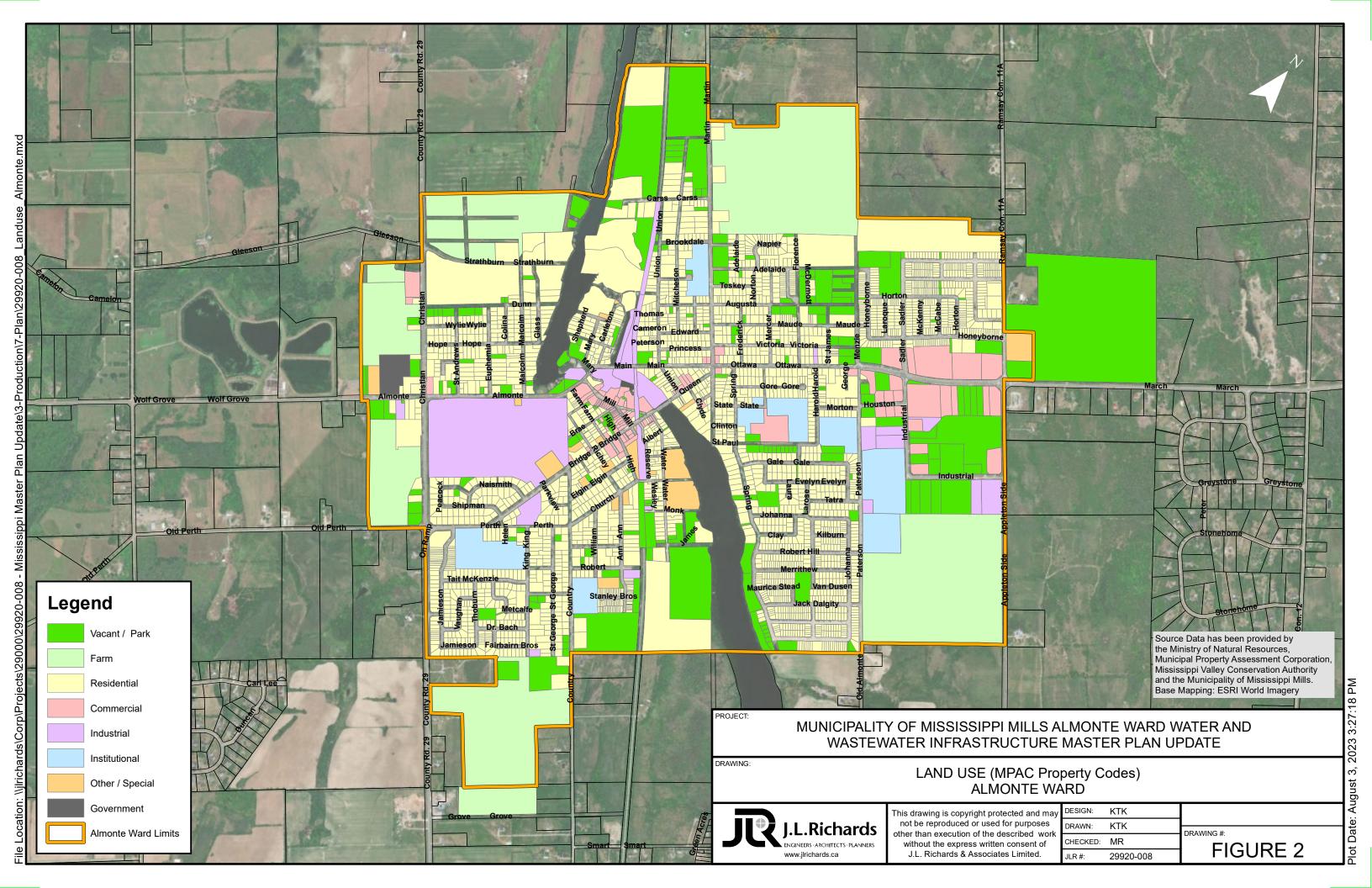
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APPENDIX 1

Supporting Figures

Almonte Vacant Lands Land Use Almonte Building Permit Tracking





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