



City of Oshawa
FINAL GROWTH MANAGEMENT
STUDY (G.M.S.)
Land Needs Assessment

March 2026





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Land Acknowledgement

The City of Oshawa is situated on lands within the traditional and treaty territory of the Michi Saagiig and Chippewa Anishinaabeg and the signatories of the Williams Treaties, which include the Mississaugas of Scugog Island, Hiawatha, Curve Lake, and Alderville First Nations, and the Chippewas of Georgina Island, Rama and Beausoleil First Nations.

We are grateful for the Anishinaabeg who have cared for the land and waters within this territory since time immemorial.

We recognize that Oshawa is steeped in rich Indigenous history and is now present day home to many First Nations, Inuit and Métis people. We express gratitude for this diverse group of Indigenous Peoples who continue to care for the land and shape and strengthen our community.

“Oshawa” stems from an Anishinaabemowin (Ojibwe language) word meaning “a crossing place” and has further translation as “the point at the crossing of the stream where the canoe was exchanged for the trail.” When the word Oshawa was chosen as the name of our City, it reflected and recognized the importance of water and land to our community. Our City’s name is a reminder of this important and powerful connection between people and place in the past but also of the present and for the future.

As a municipality, we are crossing over. We are committed to understanding the truth of our shared history, acknowledging our role in addressing the negative impacts that colonization continues to have on Indigenous Peoples, developing reciprocal relationships, and taking meaningful action toward reconciliation.

We are all Treaty people.



Executive Summary

The City of Oshawa Growth Management Study (G.M.S.) – Land Needs Assessment (L.N.A.) provides a strategic framework to guide urban development to 2056. Prepared by Watson & Associates (Watson) and WSP Canada Inc. (WSP), this report supports Imagine Oshawa: the Official Plan Review (O.P.R.) and aligns with provincial and regional planning directives, including the Provincial Planning Statement, 2024 (P.P.S.) and Envision Durham. The L.N.A. evaluates Oshawa’s capacity to accommodate forecast population, housing, and employment growth, and recommends policies to ensure sustainable, efficient, and complete community development.

Of note, the L.N.A. is focused on the 2056 land requirements within the Designated Growth Area (D.G.A.) Community Area lands, while the forthcoming Intensification Strategy and Employment Lands Strategy (E.L.S.) will focus on growth in the Built-Up Area (B.U.A.) and Employment Areas, respectively.¹ The following defines these terms in more detail:

Community Areas: Areas where most of the housing required to accommodate the forecast population will be located, as well as most population-related jobs, most office jobs and some Employment Land Employment (E.L.E.) jobs. Community areas include the B.U.A. and D.G.A.

Employment Areas: Areas where most of the E.L.E. jobs are (i.e., employment in industrial-type buildings), as well as some office jobs and some population-related jobs, particularly those providing services to the Employment Area. Employment Areas may be located in both the B.U.A. and D.G.A.

Chapter 1: Introduction

The L.N.A. is a key deliverable of Oshawa’s O.P.R., mandated by the Planning Act to ensure conformity with provincial policy. It responds to significant legislative changes, including Bill 23, which transferred land use planning responsibilities and approval authority from Durham Region to local municipalities. This report is one of five interrelated G.M.S. components and focuses on assessing land needs in the City of Oshawa to accommodate growth to 2056.

Chapter 2: Background

Chapter 2 outlines the legislative, policy, and economic context shaping Oshawa’s growth. It reviews the provincial framework (Planning Act, P.P.S.), regional direction (Envision Durham), and local responsibilities under Bill 23. It also examines macroeconomic and demographic trends, including immigration policy shifts, housing affordability, and infrastructure investments,

¹ The 2024 P.P.S., which has replaced the Growth Plan, now uses the term built-up areas to refer more generally to “...areas where development is concentrated and which have a mix of land uses.”



that influence Oshawa's development trajectory. The chapter emphasizes the City's role in proactively managing growth to support livability, competitiveness, and sustainability.

Chapter 3: City of Oshawa Growth Forecast

Oshawa is forecast to grow to approximately 314,400 residents and 113,000 jobs by 2056. This builds on the forecast from Envision Durham of nearly 300,000 people in Oshawa by 2051. The 2056 forecast represents an average annual population growth rate of 1.2 percent and an annual employment growth rate of 1.4 percent. The City has already exceeded short-term projections, with an estimated 2024 population of 207,400, surpassing the original 2026 forecast. Housing growth is expected to shift toward more compact housing forms (such as townhouses, stacked townhouses, apartments, and accessory residential units), driven by affordability, demographic change, and market demand.

The residential forecast is distributed across three policy areas: the B.U.A., the D.G.A., and the Rural Area. The B.U.A. is expected to accommodate approximately 22,000 new units, primarily in high-density forms such as apartments, supporting the City's 50% intensification target. The D.G.A. is forecast to support a more balanced mix of housing, with nearly 80% of new units in low- and medium-density formats. This distribution aligns with market demand and supports complete community objectives.

Employment growth is expected to be concentrated in the Population-Related Employment category, followed by Employment Areas and Major Office Employment. Approximately 56% of new jobs are forecast in Community Areas, with the remainder in Employment Areas. Within Community Areas, the B.U.A. will continue to serve as the core for office and institutional employment, while the D.G.A. will accommodate local-serving jobs associated with residential growth.

Chapter 4: Designated Growth Area Land Needs Assessment

The D.G.A. encompasses approximately 1,960 hectares of gross developable land, including the 403 hectares added as 2051 Urban Expansion Areas through Envision Durham. This chapter provides a detailed breakdown of the D.G.A. by development status: developed lands, active applications, and remaining vacant lands. As of mid-2025, 715 hectares have been developed, accommodating 42,900 people and jobs at an average density of 60 people and jobs per hectare (P&J/ha). Lands with active applications cover 373 hectares and are forecast to support 25,300 people and jobs at 68 P&J/ha, reflecting a growing share of high-density housing forms such as stacked townhouses and apartments.

The chapter also reevaluates the density assumptions used in Envision Durham, which applied a lower target of 50 P&J/ha. The updated analysis confirms that actual and forecast densities in Oshawa are higher, supporting more efficient land use and reducing the need for further urban expansion. Accordingly, the remaining vacant lands, including the 2051 Urban



Expansion Areas, account for 872 hectares and are forecast to accommodate 55,200 people and jobs at 63 P&J/ha. These lands are expected to support a greater share of low- and medium-density housing, complementing the higher-density development in the B.U.A.

Overall, the D.G.A. is projected to accommodate 116,100 people and jobs by 2056, leaving a surplus of approximately 105 hectares, recognizing that some designated lands are likely to remain undeveloped over the planning horizon due to physical, servicing, or market constraints. This surplus indicates that Oshawa can meet its long-term growth targets without fully developing all D.G.A. lands. The findings reinforce the importance of a phasing strategy to guide development in a fiscally responsible and infrastructure-aligned manner.

Chapter 5: Policy Recommendations

The policy recommendations focus on ensuring Oshawa can accommodate forecast growth in a sustainable and fiscally responsible manner. They emphasize balancing intensification and D.G.A. development, supporting a diverse housing mix, and aligning growth with infrastructure delivery. The recommendations include adopting updated forecasts to 2056; maintaining a minimum 25% affordable housing target City-wide and a 35% target within Strategic Growth Areas (S.G.A.s); and establishing a clear urban structure and hierarchy to direct growth to areas best served by transit and services. The policies also reinforce the importance of maintaining a 15-year land supply for housing, setting a City-wide intensification target of 50%, and introducing density targets for D.G.A.s and S.G.A.s. Collectively, these measures provide the framework for implementing Oshawa's O.P.R. and ensuring growth supports complete communities, housing affordability, and long-term competitiveness.

Chapter 6: Conclusions

Oshawa has sufficient land to accommodate forecast growth to 2056. The 403 hectares of 2051 Urban Expansion Areas identified through Envision Durham have already been incorporated into the City's D.G.A. and are treated as part of the existing land supply in this assessment. This means that the expansion is not a future consideration but a confirmed component of Oshawa's growth framework.

The analysis demonstrates that even with this expansion, Oshawa is likely to carry a modest land surplus to 2056, reinforcing the importance of careful staging and a phasing strategy, which presents an opportunity to guide development in a fiscally responsible, infrastructure-aligned, and community-focused manner. The development of a phasing strategy will ensure that development proceeds in an orderly manner, avoids premature servicing costs, and supports livability and economic competitiveness. This L.N.A. provides a foundation for the O.P.R. and confirms that Oshawa is well-positioned to accommodate growth to 2056 within a sustainable and locally tailored framework. Continued monitoring of growth trends will be important to ensure this framework remains responsive to changing conditions.

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1 Introduction

The City of Oshawa has engaged Watson & Associates Economists Ltd. (Watson) and WSP Canada Inc. (WSP) to undertake a Growth Management Study (G.M.S.) to the 2056 planning horizon as an important component of Imagine Oshawa: the Official Plan Review (O.P.R.) process. Growth management aims to harmonize a municipality’s long-term vision for its urban areas, rural regions, and conserved countryside with planning policies that guide the pattern, location and phasing of growth and change. This ensures the municipality develops financially, environmentally, and socioeconomically sustainably.

1.1 Why Are We Undertaking a Growth Management Study?

The City of Oshawa is undertaking a comprehensive review of the Oshawa Official Plan (O.O.P.), a key component of which is the preparation of a G.M.S. The Planning Act requires all municipal land use planning decisions to be consistent with the Provincial Planning Statement, 2024 (P.P.S.) and to conform with applicable Provincial Plans. This requires the City of Oshawa to ensure that its Official Plan (O.P.), a long-range policy document that guides all land use planning decisions at a more local level, is updated regularly to remain relevant and aligned with current provincial direction.²

In general, provincial direction is first implemented through a Regional O.P. update, such as the recently completed Envision Durham process, before a corresponding lower-tier municipal O.P., such as the City of Oshawa’s, is updated.³ There have been numerous and significant provincial policy changes since 2016, however, including several subsequent to the completion of Envision Durham, that the Oshawa O.P.R. process will also need to implement.

The recent Durham Regional O.P.: Envision Durham (“Envision Durham”), adopted by Regional Council on May 17, 2023, partially approved with modifications by the Province on September 3, 2024, and fully approved by the Province on December 13, 2024, reflects the City’s rapid growth, both historical and recent. Envision Durham generally aligns with updated provincial policy direction and allocates significant forecast growth to the City of Oshawa, projecting nearly 300,000 residents and 110,000 jobs by 2051. The G.M.S. focuses on implementing these targets from Envision Durham through a locally driven plan, ensuring that the City grows efficiently and sustainably over the long term.

² Note that as a result of Bill 23, Durham Region’s land use planning responsibilities were transferred, effective January 1, 2025, to Durham’s local municipalities, including Oshawa. This recent legislative change is outlined and addressed in subsection 2.1.2.

³ The Durham Regional Official Plan is entitled Envision Durham. The Durham Regional O.P.R. process that resulted in the Envision Durham is referred to in the Growth Management Study Background Discussion Paper (B.D.P.) as the Envision Durham process.

1.2 Deliverables

This Land Needs Assessment (L.N.A.) Report assesses the amount of Designated Growth Area (D.G.A.) Community Area land required to accommodate projected population, housing, and employment growth within Oshawa. The L.N.A. is focused on the 2056 land requirements within the D.G.A. Community Area lands, while the forthcoming Intensification Strategy and Employment Lands Strategy (E.L.S.) reports will focus on growth in the Built-Up Area (B.U.A.) and Employment Areas, respectively.⁴ The following defines these terms in more detail:

Community Areas: Areas where most of the housing required to accommodate the forecast population will be located, as well as most population-related jobs, most office jobs and some Employment Land Employment (E.L.E.) jobs. Community areas include the B.U.A. and D.G.A.

Employment Areas: Areas where most of the E.L.E. jobs are (i.e., employment in industrial-type buildings), as well as some office jobs and some population-related jobs, particularly those providing services to the Employment Area. Employment Areas may be located in both the B.U.A. and D.G.A.

The L.N.A. Report builds on the population, employment and household growth forecasts for the City of Oshawa that were generated as part of Envision Durham. It will also address the balance between intensification and D.G.A. growth, the range and mix of dwelling and housing types and forms appropriate to accommodate growth, the City's employment needs on D.G.A. Community Area lands, and suitable growth management policies to achieve these outcomes.

The L.N.A. Report functions within the context of five City of Oshawa G.M.S. reports:

1. Background Discussion Paper

The Background Discussion Paper (B.D.P.) presents the G.M.S., outlines existing and emerging policy as well as macro and local growth conditions, identifies growth opportunities and challenges and provides research directions to be considered in the G.M.S. The B.D.P. summarizes the City's evolution since the last Oshawa O.P.R. and highlights future growth areas.

2. Land Needs Assessment (L.N.A.)

As discussed above, the L.N.A. refines and extends Envision Durham forecasts for Oshawa. It also considers the balance between intensification and D.G.A. growth, housing mix, D.G.A. Community Area land needs, and growth management policies.

⁴ The 2024 P.P.S., which has replaced the Growth Plan, now uses the term built-up areas to refer more generally to "...areas where development is concentrated and which have a mix of land uses."

3. Employment Lands Strategy

The E.L.S. will provide a detailed inventory and analysis of the City's Employment Area land supply. It will assess land absorption trends, regional competitiveness, and emerging sector needs. The E.L.S. will evaluate the adequacy of the current supply relative to future demand and identify areas of potential constraint, fragmentation, or underutilization. It will also provide recommendations related to land use designation refinement, protection of strategic Employment Areas, and Employment Area removals of existing designated Employment Areas, where appropriate (examining current Employment Area lands within the new definition from the P.P.S. to determine whether a land use conversion is merited). The E.L.S. will be closely aligned with infrastructure and transportation planning considerations to ensure that key Employment Areas are well-positioned to support long-term economic development and job creation.

4. Intensification Strategy

The Intensification Strategy will assess Oshawa's ability to accommodate population and employment growth through intensification within its existing Urban Area boundaries. It will review current conditions, trends, and policies, and develop intensification strategies, including specific areas in the City as required by the Province. Specifically, the Intensification Strategy will identify the scale and types of intensification suitable for Oshawa, including establishing density targets and policies for D.G.A.s, Strategic Growth Areas (S.G.A.s), and Protected Major Transit Station Areas (P.M.T.S.A.s). Additionally, the Intensification Strategy will flag areas with significant intensification potential based on servicing, urban design, affordability, and access to transit considerations.

5. Growth Phasing and Urban Expansion Options Report

The Growth Phasing and Urban Expansion Options Report will evaluate where Oshawa should grow geographically. It will assess the 2051 Urban Expansion Areas added through Envision Durham based on planning, servicing, and market readiness criteria. It will then set up a phasing framework prioritizing development areas, considering infrastructure capacity, cost efficiency, and community-building goals. The Report will explore different development scenarios and provide guidance on sequencing to the planning horizon. It will serve as a foundation for integrating growth planning with Oshawa's capital works, infrastructure plans, financial tools such as development charges, and asset management strategies.

2 Background

Understanding Oshawa’s long-term land needs requires situating local planning decisions within the broader legislative, policy, and economic context. Provincial direction through the Planning Act and the P.P.S. establishes the overarching framework for growth management, while Envision Durham sets population, housing, and employment targets to 2051 that must now be implemented locally through the O.P.R. In parallel, Bill 23 has shifted planning responsibilities to the City, requiring a direct response to provincial and Regional policies in the O.P.R.

This chapter outlines the policy and economic conditions that shape Oshawa’s growth outlook to 2056. It begins with the provincial, Regional, and local policy framework that guides conformity requirements and growth allocations. It then examines the demographic and economic forces driving population and employment growth across Ontario, Durham Region, and the City, including recent shifts in immigration, labour force trends, and housing demand. Together, these elements provide the foundation for the City’s G.M.S., ensuring that land needs are assessed within both the statutory planning framework and the wider market forces influencing Oshawa’s development trajectory. Further analysis of topic-based macroeconomic trends will be provided in the E.L.S. and Intensification Strategy reports.

2.1 Policy Context

2.1.1 Provincial Framework

The City of Oshawa’s G.M.S. is guided by the broader legislative and policy framework established under the Planning Act, the P.P.S., and the recently approved Durham Regional Official Plan, Envision Durham. These policies set the basis for local planning decisions and establish requirements for land supply, intensification, infrastructure phasing, and complete community planning.

The Planning Act requires all municipal planning decisions to be consistent with the P.P.S. and to conform with applicable Provincial Plans. The P.P.S. provides province-wide direction on matters such as housing supply, infrastructure, employment, and natural heritage, and requires municipalities to maintain a 20- to 30-year land supply, with at least 15 years of designated residential lands and a minimum of three years of “shovel-ready” housing.

The P.P.S. also requires municipalities to base their population and employment forecasts on the Ontario Population Projections published by the Ministry of Finance (M.O.F.) and may make modifications as appropriate.⁵ With this being said, the P.P.S. also permits previous

⁵ The work undertaken through the Oshawa G.M.S. is consistent with the proposed Projection Methodology Guidelines (P.M.G.) released by the Ministry of Municipal Affairs and Housing (M.M.A.H.).

forecasts issued through the 2020 Growth Plan for the Greater Golden Horseshoe (the Growth Plan) to continue to be used. The Growth Plan’s 2051 Durham population and employment forecasts are currently being utilized as Region-wide control totals pursuant to Envision Durham.

2.1.2 Regional and Local Framework

Envision Durham, fully approved by the Province in December 2024, allocates significant growth to Oshawa to 2051. It designates new Urban Expansion Areas and establishes minimum density requirements for D.G.A.s and Employment Areas. Due to Bill 23, responsibility for implementing these policies now rests with Oshawa through its O.P. Review, Imagine Oshawa. These themes – including intensification targets, urban expansion, and phasing – were examined in greater detail through the G.M.S. B.D.P., which also highlighted the implications of provincial changes such as the replacement of the 2020 P.P.S. with the 2024 P.P.S. and their relevance to Oshawa’s long-term planning framework. For the purposes of this L.N.A., this section provides only a high-level policy context, with the detailed review of provincial and Regional policies contained in the B.D.P.

As a result of Bill 23, Durham Region’s land use planning responsibilities and approval authority were transferred, effective January 1, 2025, to Durham’s local municipalities, including Oshawa. This means Oshawa must now not only conform to Envision Durham in accordance with section 27 of the Planning Act, but also actively reconcile Regional policies that may no longer fully align with the provincial framework. The City is therefore responsible for interpreting how these changes affect its growth trajectory, balancing conformity obligations with local priorities such as fiscal sustainability, infrastructure staging, and housing choice. The L.N.A. provides a platform for this work by identifying where Oshawa has flexibility within the Envision Durham framework, such as intensification targets, D.G.A. densities, and growth phasing.

2.2 Federal and Provincial Population Growth Context

2.2.1 Canadian Federal Immigration Targets

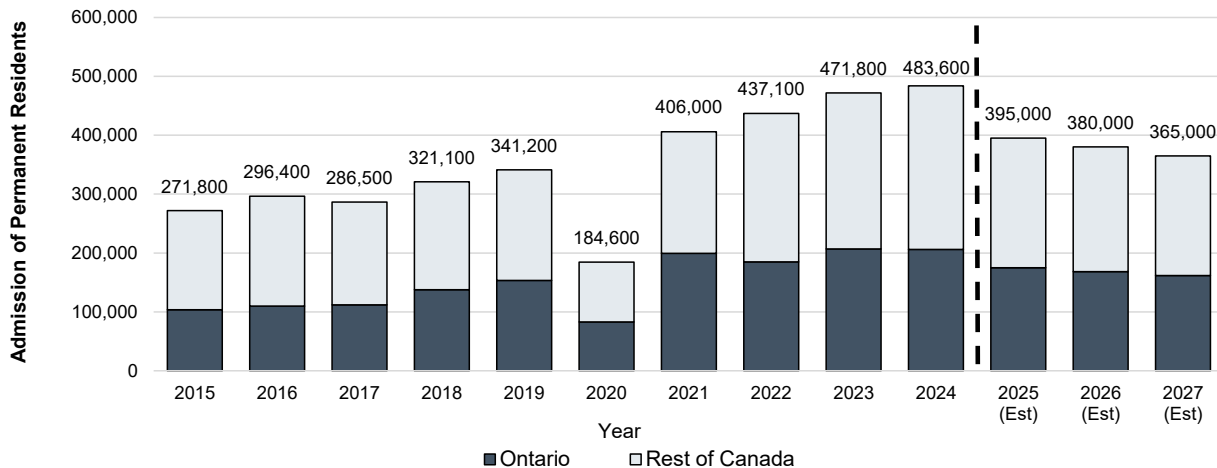
Canada’s population has experienced significant growth in recent years. During the recovery period from COVID-19, immigration targets were raised in Canada primarily in response to federal labour force demands. Immigration accounts for almost 100% of Canada’s labour force growth and nearly 80% of its population growth. As a result of these increased immigration targets, Canada welcomed 471,800 and 483,600 new permanent residents in 2023 and 2024, respectively. With population growth outpacing Gross Domestic Product (G.D.P.) growth, the G.D.P. per capita has declined to well below pre-pandemic levels.^[6] The key challenges to

⁶ Statistics Canada, Economic and Social Reports, Canada’s Gross Domestic Product Per Capita Perspectives on the Return to the Trend report by Carter McCormack and Weimin Wang, April 24, 2024.

growth in Canadian G.D.P. per capita include declining labour productivity and a rising unemployment rate for recent immigrants.^[7] In response to these challenges, the federal government has lowered the previous near-term immigration target of 500,000 people per year to 395,000 in 2025, 380,000 in 2026, and 365,000 in 2027 (refer to Figure 1).^{8 9}

The federal government has also announced that it will reduce the percentage of non-permanent residents (N.P.R.) from 7.3% of the national population to 5.0% by the end of 2026.¹⁰ These modifications address the changing needs of the country by easing pressures on housing, infrastructure, and social services. These changes are anticipated to have a further downward impact on future population growth in Canada, including Ontario, over the next few years.¹¹ Based on 2024 data and looking forward through 2025 and beyond, despite the target cuts, immigration levels to Canada and Ontario are anticipated to remain strong, exceeding pre-pandemic averages between 2015 and 2019.

Figure 1: Admission of Permanent Residents in Ontario and Canada, Historical (2015 to 2024) and Forecast (2025 to 2027)



Note: Figures have been rounded and may not add precisely.

Source: 2015 to 2024 derived from Immigration, Refugees, and Citizenship Canada (I.R.C.C.) April 22, 2025, data. 2024 to 2027 federal targets from the Government of Canada's Immigration Levels Plan for

⁷ TD Economic Reports, Canadian Employment (July 2024), Canada's job market softens further in July, published August 9, 2024.

⁸ Non-permanent residents are defined by Statistics Canada as persons from another country who have been legally granted the right to live in Canada on a temporary resident permit, along with members of their family living with them. These residents include foreign workers, foreign students, the humanitarian population such as refugees, and other temporary residents.

⁹ N.P.R. share as of Q3 2024 derived from Statistics Canada Tables 17-10-0009-01 and 17-10-0121-01. There are 3,002,090 N.P.R. out of 41,288,599 residents in Canada.

¹⁰ N.P.R. national population target of 5% from the Government of Canada 2025-2027 Immigration Levels Plan.

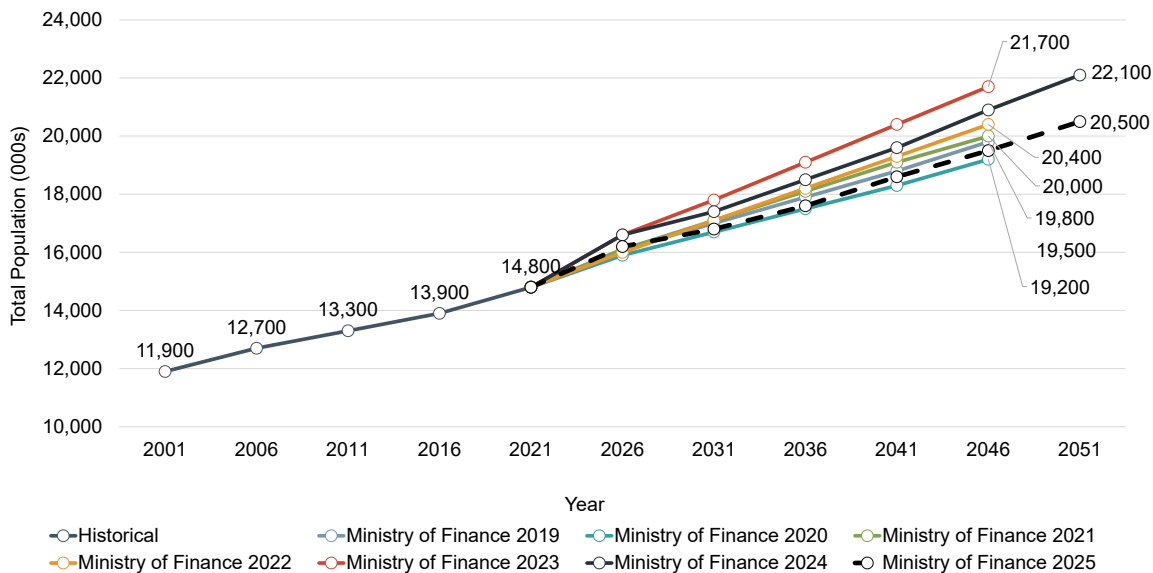
¹¹ Government of Canada News Release, October 24, 2024. <https://www.canada.ca/en/immigration-refugees-citizenship/news/2024/10/government-of-canada-reduces-immigration.html>

2025 to 2027, and the Ontario target estimated based on the historical share of 44% of the Canadian Permanent Residents Admissions from 2018 to 2024, by Watson & Associates Economists Ltd.

2.2.2 Provincial Population Growth Outlook

With respect to the provincial growth outlook, the most recent 2025 M.O.F. population projections show a relative decrease in the growth outlook for Ontario to 20.5 million by 2051 (see Figure 2). Relative to the 2024 M.O.F. forecast, the M.O.F. projects a reduction of 1.6 million people from 22.1 million to 20.5 million by 2051. This reduction is largely attributed to the federal government’s announcement to reduce the national percentage of N.P.R. over the coming years and modestly lower immigration targets. The 2025 M.O.F. population forecast projects a similar long-term population growth rate for the province compared to historical trends experienced over the past 20 years, with an annual growth rate of 1.1% between 2021 and 2051. This translates into an annual increase of 190,000 people. Comparatively, the level of annual population growth forecast for Ontario under the 2025 M.O.F. forecast is 29% higher than the level of population growth achieved between 2001 and 2021.

Figure 2: Province of Ontario 2019 to 2025 Ministry of Finance Population Projections, 2021 to 2051



Note: Population includes net Census undercount. Figures have been rounded.

Source: Historical 2001 to 2021 data from Statistics Canada Table: 17-10-0152-01, and Ministry of Finance projections from Summer 2019, Spring 2020, Spring 2021, Summer 2022, Summer 2023, Fall 2024, and 2025 Interim Update releases derived by Watson & Associates Economists Ltd.

2.2.3 Regional Population Outlook

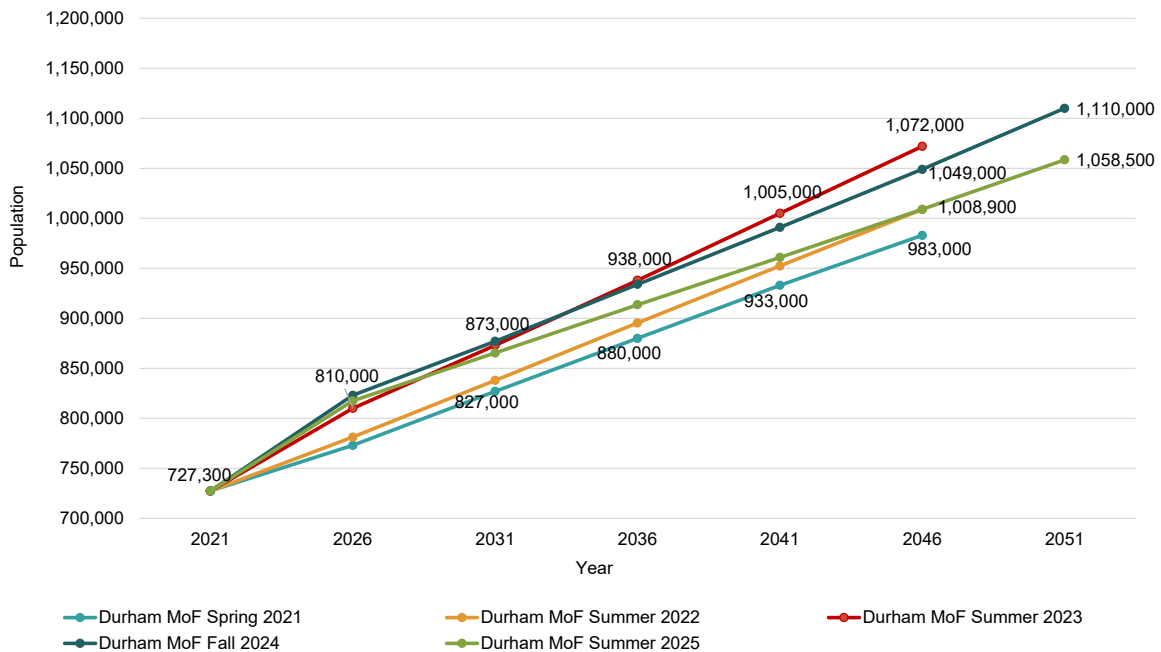
A similar trend is seen in Durham Region and the Province. Between 2001 and 2021, Durham Region grew at an average annual rate of 1.6%, which is approximately 10,000 people per year during this time period. The 2021 to 2023 M.O.F. projections increased Durham’s long-term population forecast from 983,000 to 1,072,000 (see Figure 3). The projections for 2024

and 2025, however, are now lower, to 1,049,000 and 1,005,000 by 2046. The most recent 2025 M.O.F. Reference Scenario projects that Durham Region will grow at an annual growth rate of 1.5% from 2021 to 2051, which is slightly lower than its historical growth over the last two decades and the former Growth Plan, 2019 forecast for the Greater Golden Horseshoe (G.G.H.) growth rate of 2.0%. By 2051, Durham Region is expected to reach 1.06 million people under the 2025 M.O.F. Reference Scenario, which is approximately 241,500 people lower than the Growth Plan, 2019 forecast for the G.G.H.

In accordance with our review of regional growth trends and the long-term growth potential for Durham Region, it is our opinion that the 2025 M.O.F. forecast for Durham Region is very conservative. Accordingly, it is our opinion that the former Growth Plan, 2019 population forecast for Durham Region, as currently embraced in the Durham R.O.P., remains appropriate for long-range planning purposes.

This is supported by the Region’s relative housing affordability across a broad range of housing options (particularly ground-oriented housing), through its residential intensification opportunities and its substantial inventory of designated urban lands when compared to other municipalities across the G.T.H.A. Together, these factors position Durham to capture a growing share of future G.T.H.A. net migration, particularly new families. In addition, continued infrastructure investments, including the Lakeshore East GO rail extension, Highway 407 access, and major water and wastewater system expansions, further enhance Durham’s development readiness.

Figure 3: Ministry of Finance Projections (2021 to 2025) for Durham Region, 2021 to 2051



Note: Population includes net Census undercount. Figures have been rounded.

Source: Ministry of Finance Projections from Summer 2020, Spring 2021, Summer 2022, Summer 2023, Fall 2024 and Summer 2025 releases, by Watson & Associates Economists Ltd.

2.2.4 Addressing the Connection Between Macro-Level Opportunities/Challenges and Local City Building Strategies

As summarized above, as well as throughout the B.D.P., a broad range of factors related to macro-economics, demographics, competitiveness, infrastructure investment, and federal immigration policy have, and will continue to influence the future population and employment potential of Durham Region, including the City of Oshawa, over the next several decades. While it is important to understand the broad range of factors which can have a direct influence on future population growth trends in Oshawa, it is also recognized that the City of Oshawa has limited control regarding how these various macro factors influence local growth and development trends when planning for the City's future. On the other hand, the City of Oshawa does have considerable control to continue to proactively manage long-term urban growth and change in a manner which continues to position Oshawa in a positive manner over the long term.

In planning for its future, addressing the interconnection between the City's competitive economic position and its longer-term housing needs by market segment is critical in realizing the City's future forecast population and employment growth potential. This approach recognizes that the accommodation of skilled labour and the attraction of new businesses are inextricably linked and positively reinforce one another. To ensure that economic growth is not constrained by potential labour shortages, the City of Oshawa continues to work with its public and private sector partners to explore ways to attract and accommodate new specialized and non-specialized working residents to the City within a diverse range of housing options. Attraction efforts must also be linked to housing accommodation (both ownership and rental), infrastructure, municipal services, and amenities, as well as quality of life attributes that appeal to young adults and families, while not detracting from the need to accommodate the City's growing seniors' population.

This G.M.S. presents an opportunity to tackle these significant city-building issues head-on, with the outcome reflecting a thriving city that offers well-being, potential, and quality of life for everyone. Ultimately, a key objective for the City of Oshawa will be to accommodate growth and change in a manner that preserves the City's livability while embracing development patterns that are sustainable from a triple-bottom-line perspective (i.e., environmental, financial, and socio-economic).

3 City of Oshawa Growth Forecast

3.1 City of Oshawa Population Forecast, 2021 to 2056

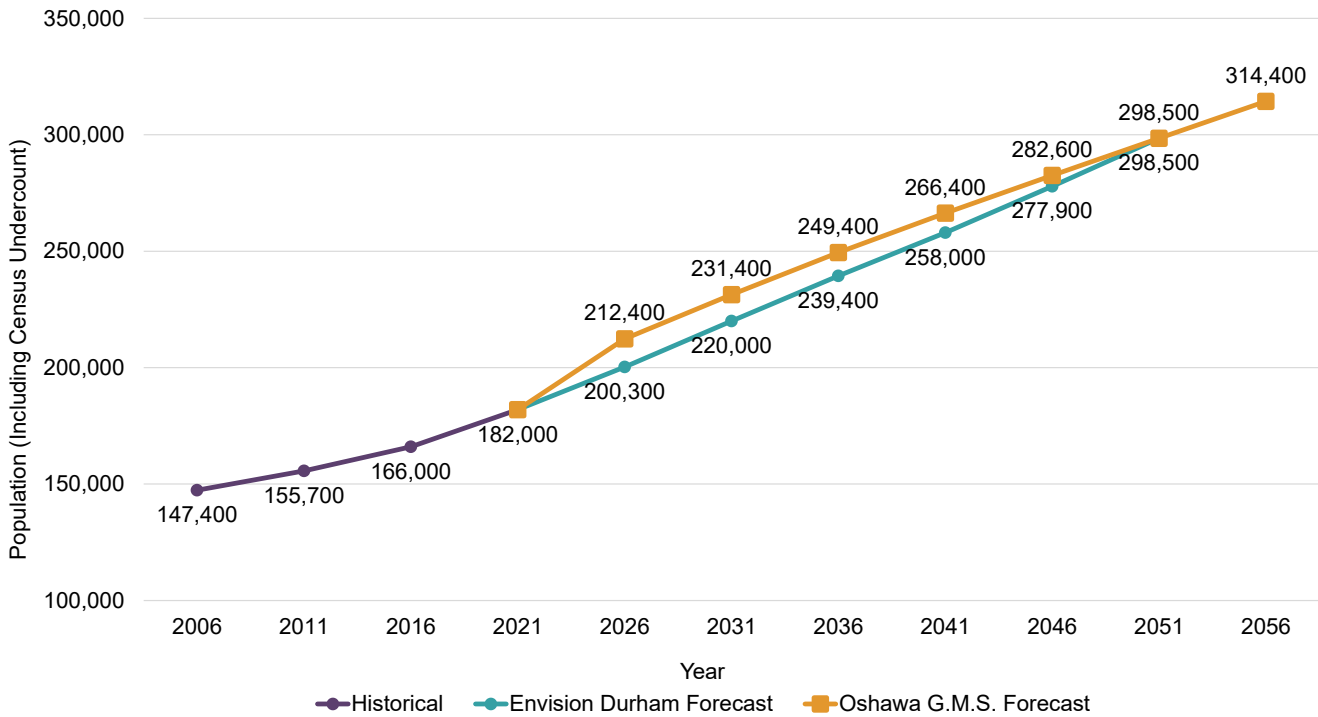
This forecast represents the anticipated future growth for the City of Oshawa over the next 30 years. Figure 4 displays the 2025 City of Oshawa population forecast and provides the Envision Durham growth forecast for Oshawa for comparative purposes.¹² As highlighted, the total population in the City of Oshawa is forecast to reach 298,500 by 2051, and 314,400 persons by 2056, representing an average annual growth rate of 1.2% between 2021 and 2056.¹³ This forecast extends the 2051 forecast from Envision Durham, estimating an additional 15,900 people between 2051 and 2056.

While the 2051 forecast for the City is consistent with Envision Durham, there are some updates made in the short- and medium-term growth outlook to account for more recent information. Based on Statistics Canada postcensal estimates, Oshawa's 2024 population is estimated at 207,400, already exceeding the original 2026 forecast of 200,300. While population growth has exceeded expectations, housing remains on track with 72,900 households in 2024 compared to 73,800 forecast by 2026. This gap reflects rising persons per unit (P.P.U.s), influenced by growth in non-permanent residents, younger families, multi-generational households, student rentals, and affordability pressures leading to more shared living arrangements. As discussed previously, despite the M.O.F.'s recent downward revision of the Regions' long-term population forecast to 2051, the former Growth Plan, 2020 Schedule 3 population forecast for Durham Region remains appropriate for long-term planning purposes. The B.D.P. highlights Durham Region and Oshawa's sustained positive outlook, noting that Oshawa is currently surpassing its population forecast from Envision Durham.

¹² Durham Region G.M.S. Phase 2 Area Municipal Growth Allocations and Land Needs, 2051, October 2022.

¹³ 2021 Statistics Canada Census. Includes Census undercount of approximately 4.2%.

Figure 4: City of Oshawa Long-Term Population Forecast, 2006 to 2056



Note: Population metrics include a net Census undercount estimated at 4.2%.

Source: 2006 - 2021 data derived from Statistics Canada, Envision Durham forecast from Durham Region G.M.S. Phase 2 Area Municipal Growth Allocations and Land Needs, 2051, October 2022; 2025 GMS forecast by Watson & Associates Economists Ltd., 2025.

3.2 City of Oshawa Housing Forecast, 2021 to 2056

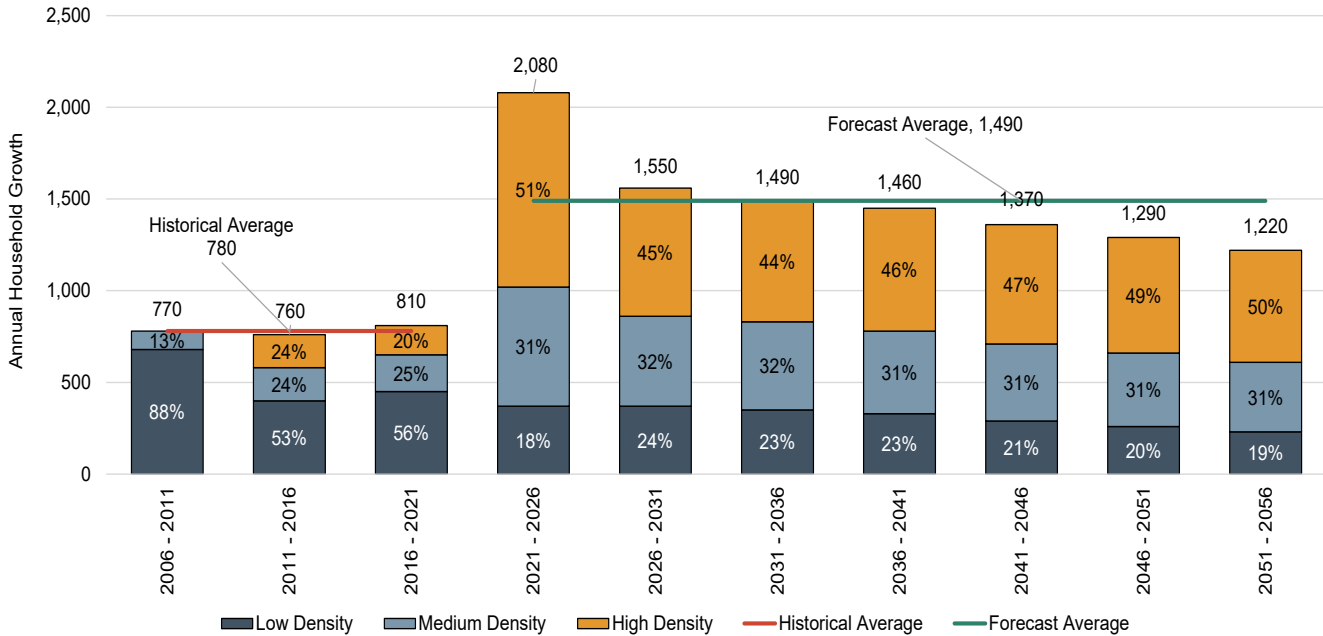
Figure 5 summarizes the City’s household forecast from 2021 to 2056 in five-year growth increments and by structure type. Housing trends between 2006 and 2021 are also provided for historical context. Key observations are as follows:

- Average annual new housing construction activity over the next two to three decades is anticipated to be greater than the historical average levels experienced over the past 15 years. While recent housing demand (2023 to 2025) has declined from recent peak levels (2020 to 2022), longer-term demand for housing in Oshawa is anticipated to average well above average levels experienced over the past 20 years, driven by continued demand from international migration as well as those moving to Durham from other locations within the G.T.H.A.
- From 2021 to 2056, new housing is forecast to include 21% low-density, 31% medium-density, and 48% high-density units. An increase in medium- and high-density housing is expected in the short term, driven by current development applications. This trend is

forecast to continue in the long term, mainly due to housing needs for the 65+ age group, seniors' housing, rising local prices, and declining affordability.

- While higher-density housing units are anticipated to increase over the forecast period, Oshawa's total share of housing units is forecast to remain dominated by the low-density and medium-density units (i.e., single-detached, semi-detached units and townhouses), as shown in Figure 6.

Figure 5: City of Oshawa Annual Incremental Housing Growth, 2006 to 2056



Low density includes singles and semi-detached units.

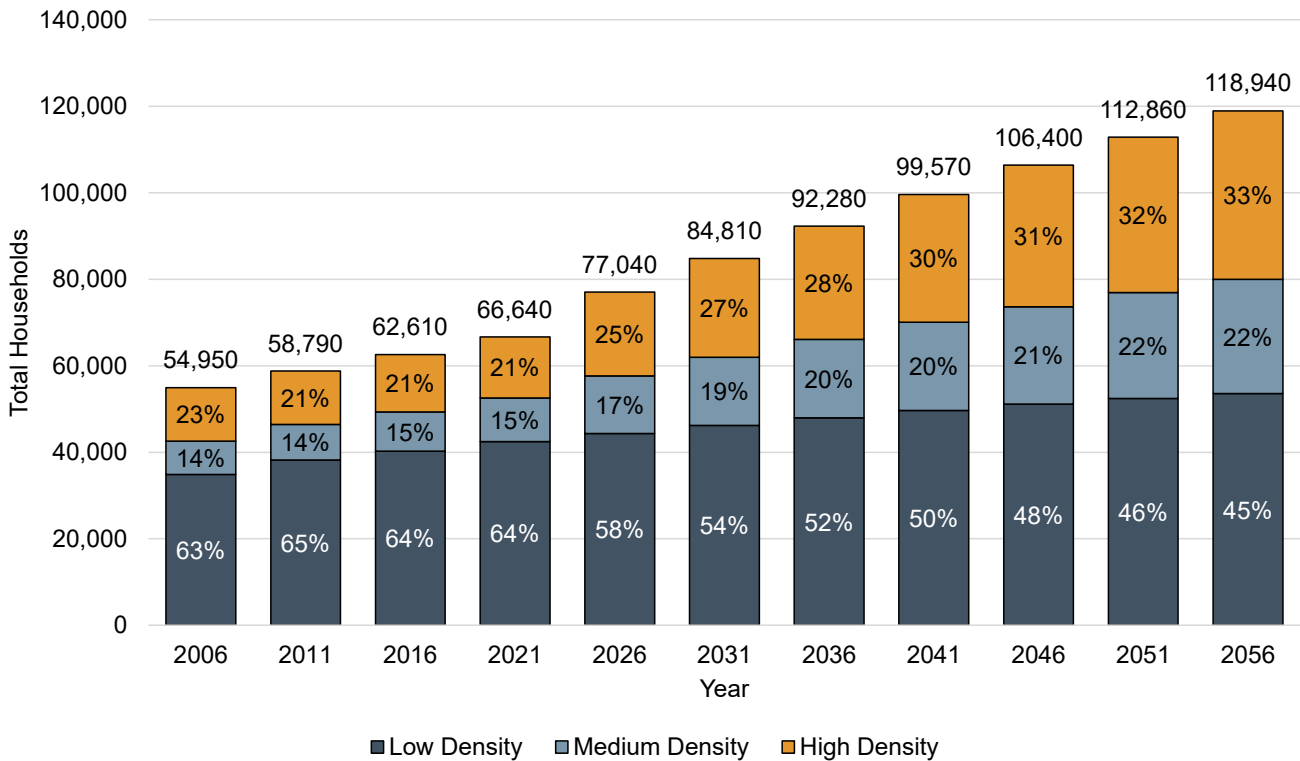
Medium density includes townhouses and apartments in duplexes.

High density includes bachelor, 1-bedroom, and 2-bedroom+ apartments.

Note: Figures may not add due to rounding.

Source: Historical 2006 to 2021 figures from Statistics Canada Census Profiles. Forecast prepared by Watson & Associates Economists Ltd., 2025.

Figure 6: City of Oshawa Total Housing by Type, 2006 to 2056



[1] Low density includes singles and semi-detached units.

[2] Medium density includes townhouses and apartments in duplexes.

[3] High density includes bachelor, 1-bedroom, and 2-bedroom+ apartments.

Note: Figures may not add due to rounding.

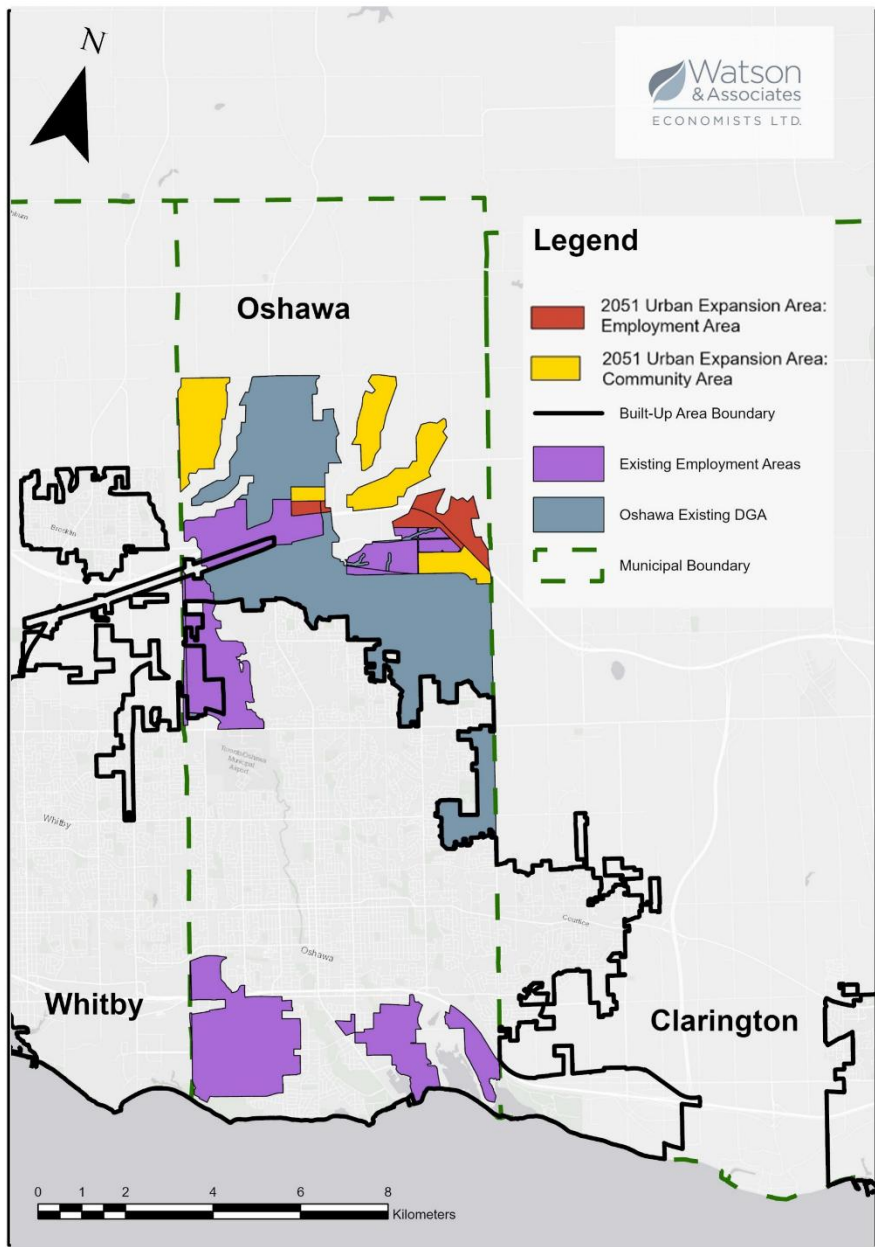
Source: Historical 2006 to 2021 figures from Statistics Canada Census Profiles. Forecast prepared by Watson & Associates Economists Ltd., 2025.

The structure type categorizations of low-, medium-, and high-density housing are organized to reflect similar occupancy patterns, measured by the P.P.U. This approach ensures consistency with Statistics Canada data and enables meaningful comparisons across Census-based housing and population datasets. Maintaining alignment with P.P.U. assumptions is critical for demographic forecasting, land needs analysis, and growth monitoring. Within this framework, particular attention is given to the concept of “missing middle” housing, which refers to a range of multi-unit or clustered housing types, such as townhouses, stacked townhouses, and low-rise apartments, that provide a transition between traditional single detached dwellings and high-rise apartments. These forms are essential for achieving a balanced housing supply, supporting affordability, and enabling gentle density increases in existing neighbourhoods. The defined density categories recognize and capture this spectrum, ensuring that medium-density and portions of high-density housing typologies align with the principles of the missing middle.

3.3 Residential Forecast by Policy Area

The City of Oshawa’s long-term growth forecast considers housing development across the B.U.A., the D.G.A., and the Rural Area (see Figure 7). Through Envision Durham, a City-wide intensification target of 50% was established. This target is appropriate for Oshawa and is being implemented through the City’s G.M.S. The target reflects both historical trends and the continued role of the B.U.A. as the strategic focus for higher-density housing, as well as the City’s D.G.A. in supporting a wide range of housing types. Chapter 4 of this Report provides a detailed assessment of D.G.A. land needs.

Figure 7: City of Oshawa Policy Areas



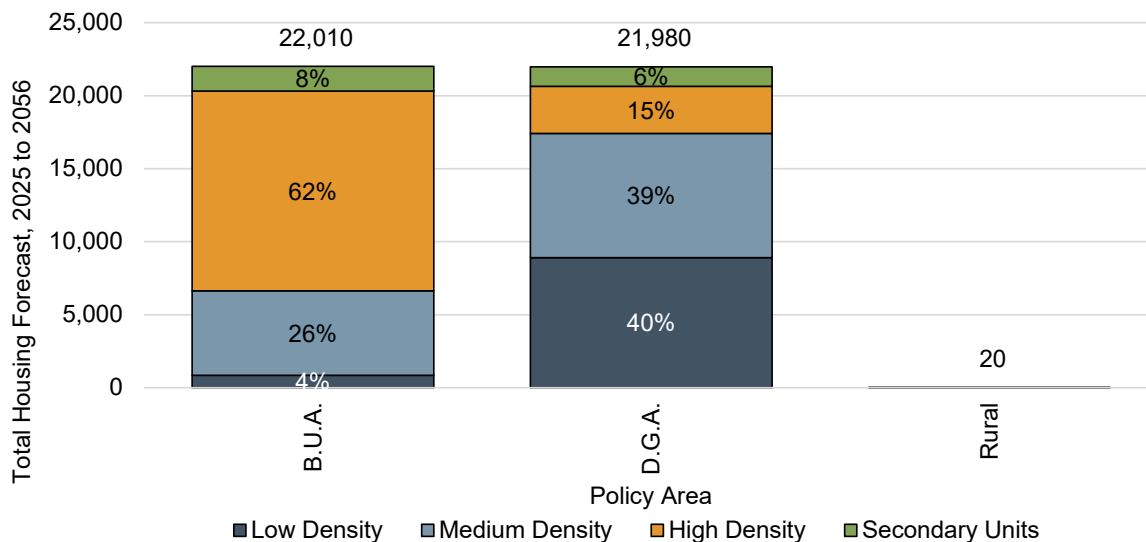
Source: Watson & Associates Economists Ltd., based on City of Oshawa G.I.S. data.

Over the 2015 to 2024 period, the B.U.A. achieved an average intensification rate of 35%. This equates to approximately 460 housing units annually, the majority of which were in high-density forms such as apartments. Growth has shown a gradual upward trend over this period, highlighting both rising demand for apartment living in Oshawa and the broader market influence of the G.T.H.A. High-density development is expected to remain the dominant form of new housing in the B.U.A. throughout the forecast horizon. From 2025 to 2056, as shown in Figure 8, the B.U.A. is forecast to accommodate approximately 22,000 housing units. This represents a notable increase from historical levels and reflects stronger housing activity across the City as a whole. The forecast reinforces the B.U.A.'s role as the primary location for accommodating Oshawa's higher-density apartment growth.¹⁴

By comparison, the D.G.A. is forecast to support a more balanced mix of housing forms, with approximately 80% of new households anticipated to be in low- and medium-density developments. While some high-density applications are present in the D.G.A., including stacked townhouses and apartments, these are expected to account for a smaller share of overall growth. The B.U.A. is identified as the strategic location for higher-density apartment opportunities, while the D.G.A. provides capacity for traditional ground-related housing.

Together, the B.U.A. and D.G.A. support the City's 50% intensification target by aligning future housing supply with market demand across different segments. Oshawa's ability to offer a wide range of housing types across the D.G.A. and B.U.A. will continue to attract growth from international migrants as well as families from other locations of the G.T.H.A.

Figure 8: City of Oshawa Housing Forecast by Structure Type and Policy Area, 2025 to 2056



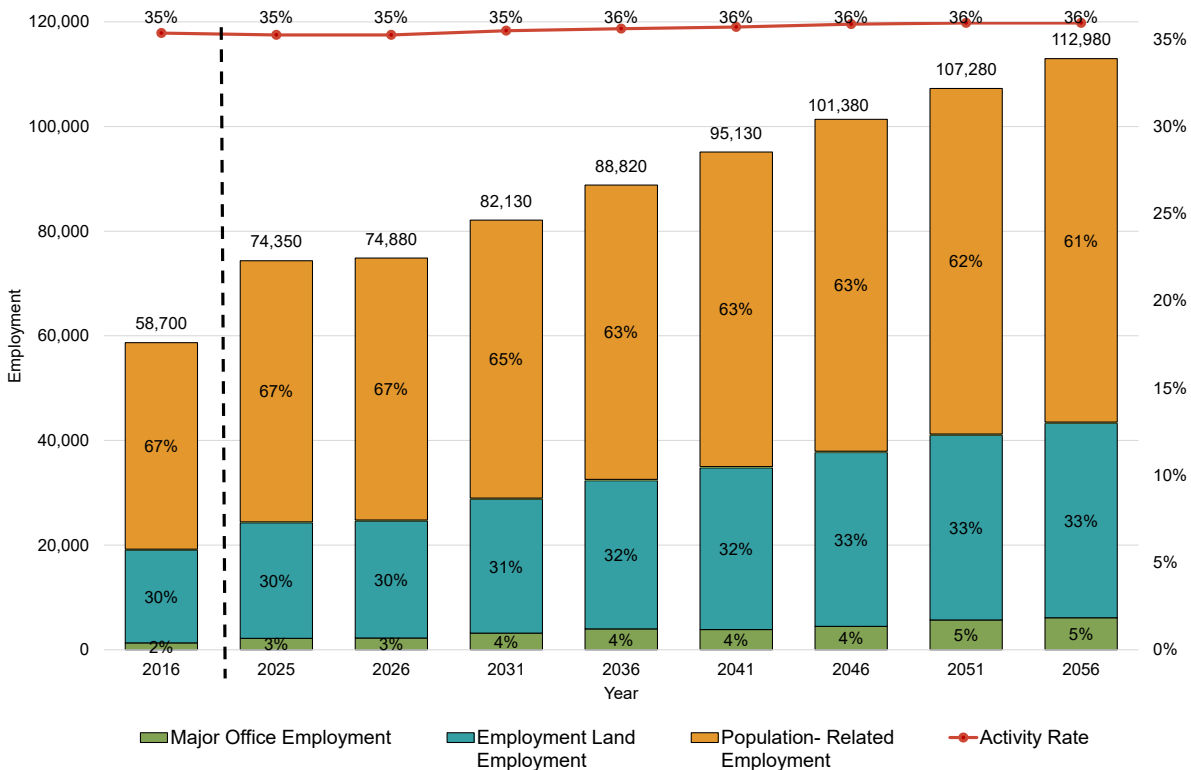
Source: Forecast prepared by Watson & Associates Economists Ltd., 2025.

¹⁴ As part of the Oshawa G.M.S., a separate Intensification Strategy report will be released, providing greater detail regarding intensification opportunities and expected outcomes in the B.U.A.

3.4 City-Wide Employment Forecast

Employment in the City of Oshawa is expected to increase at a rate of 1.4% annually between 2025 and 2056. Under this growth forecast, Oshawa’s employment base is expected to increase by approximately 38,630 jobs from 2025 to 2056. The forecast anticipates total employment will reach 113,000 jobs by 2056. Similar to population, the employment growth forecast is consistent with Envision Durham by 2051 and extended to 2056. As shown in Figure 9, the City’s employment activity rate is expected to increase slightly from 35% to 36% between 2025 and 2056.¹⁵ This means that the City of Oshawa’s employment is expected to grow at a slightly higher pace than population growth over the forecast period.

Figure 9: City of Oshawa, Historical and Forecast Employment Forecast, 2016 to 2056



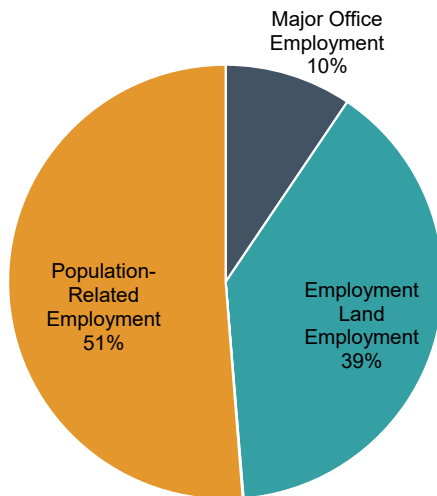
Note: Figures have been rounded. Employment figures include work at home and no fixed place of work (N.F.P.O.W.).
 Source: 2016 from Statistics Canada place of work data. Forecast 2025 to 2056 prepared by Watson & Associates Economists Ltd., 2025

Figure 10 summarizes the share of employment growth by land-use category during the 2025 to 2056 forecast period. As shown in Figure 10, the majority of forecast employment growth (approximately 51%) is expected to occur within Population-Related Employment sectors,

¹⁵ Activity rate is the ratio of jobs to population.

which serve the needs of a growing community (e.g., retail, institutional, work at home, and service-based activities). An additional 39% of total employment growth is anticipated within the Employment Area category (i.e., E.L.E.), representing jobs located in industrial-type buildings. The remaining 10% employment growth is projected within the Major Office Employment category.

Figure 10: City of Oshawa Share of Forecast Employment Growth, 2025 to 2056



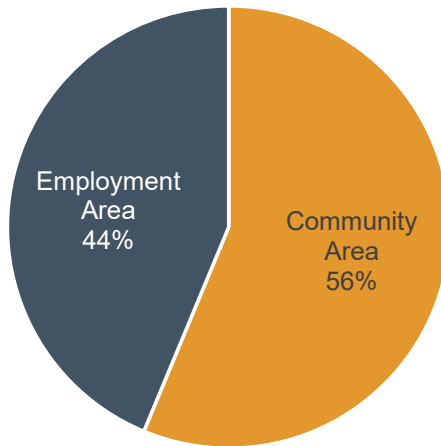
Note: Population-Related Employment includes work at home and no fixed place of work (N.F.P.O.W.). Source: Watson & Associates Economists Ltd., 2025.

3.5 Employment Forecast by Type and Policy Area, 2025 to 2056

Figure 11 summarizes the share of employment growth by location between 2025 and 2056. During this period, the City is forecast to experience employment growth of about 38,600 jobs. As shown in the figure, about 56% of this employment growth or about 21,700 jobs, are forecast to be accommodated in the Community Area, and the remaining 44% (16,900 jobs) in Employment Areas.¹⁶

¹⁶ Future details regarding the employment forecast, particularly within Employment Areas, will be provided through the forthcoming E.L.S. report.

Figure 11: City of Oshawa Share of Forecast Employment Growth by Policy Area, 2025 to 2056

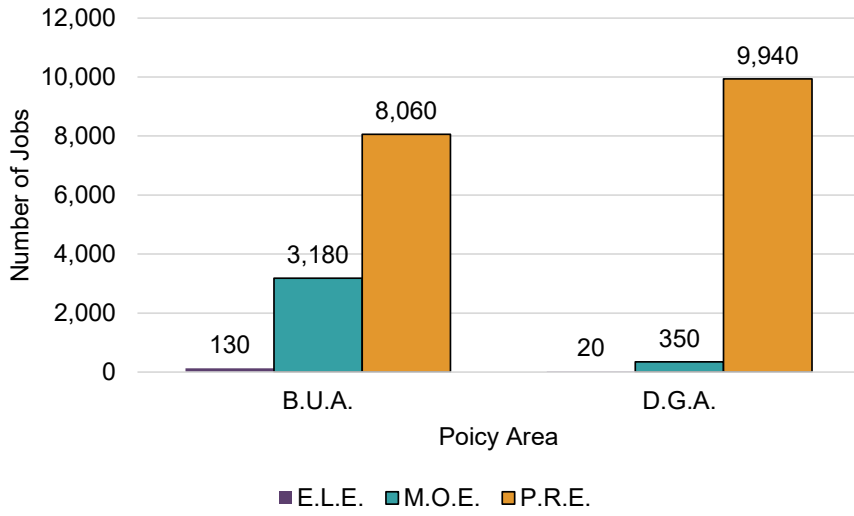


Source: Watson & Associates Economists Ltd., 2025.

The Community Areas are further divided into B.U.A., D.G.A. and Rural Areas. As shown in Figure 12, employment growth in Oshawa is expected to be concentrated in Population-Related Employment (P.R.E.) sectors across both the B.U.A. and D.G.A. The D.G.A. is forecast to accommodate slightly more P.R.E. jobs (9,900 jobs) compared to the B.U.A. (8,100 jobs), reflecting the employment generated by new residential development and local-serving industry. By contrast, Major Office Employment (M.O.E.) is heavily concentrated in the B.U.A. (3,200 jobs versus 350 in the D.G.A.), highlighting the established Urban Area's role as the City's core centre for large office and institutional employment. Looking ahead, M.O.E. is forecast to remain focused within the City's S.G.A.s, which are located primarily within the B.U.A. E.L.E. remains minimal in both areas, underscoring the limited industrial presence within urban boundaries outside of Employment Areas.¹⁷

¹⁷ It is also noted that about 50 additional jobs are allocated to the rural areas, and will include employment activities that occur outside designated urban settlement boundaries and are tied to the City/Region's agricultural and rural economic base.

Figure 12: City of Oshawa Share of Forecast Community Area Employment Growth by Land Use Category, 2025 to 2056



Source: Watson & Associates Economists Ltd., 2025.

4 Designated Growth Area Land Needs Assessment, 2056

4.1 Designated Growth Area

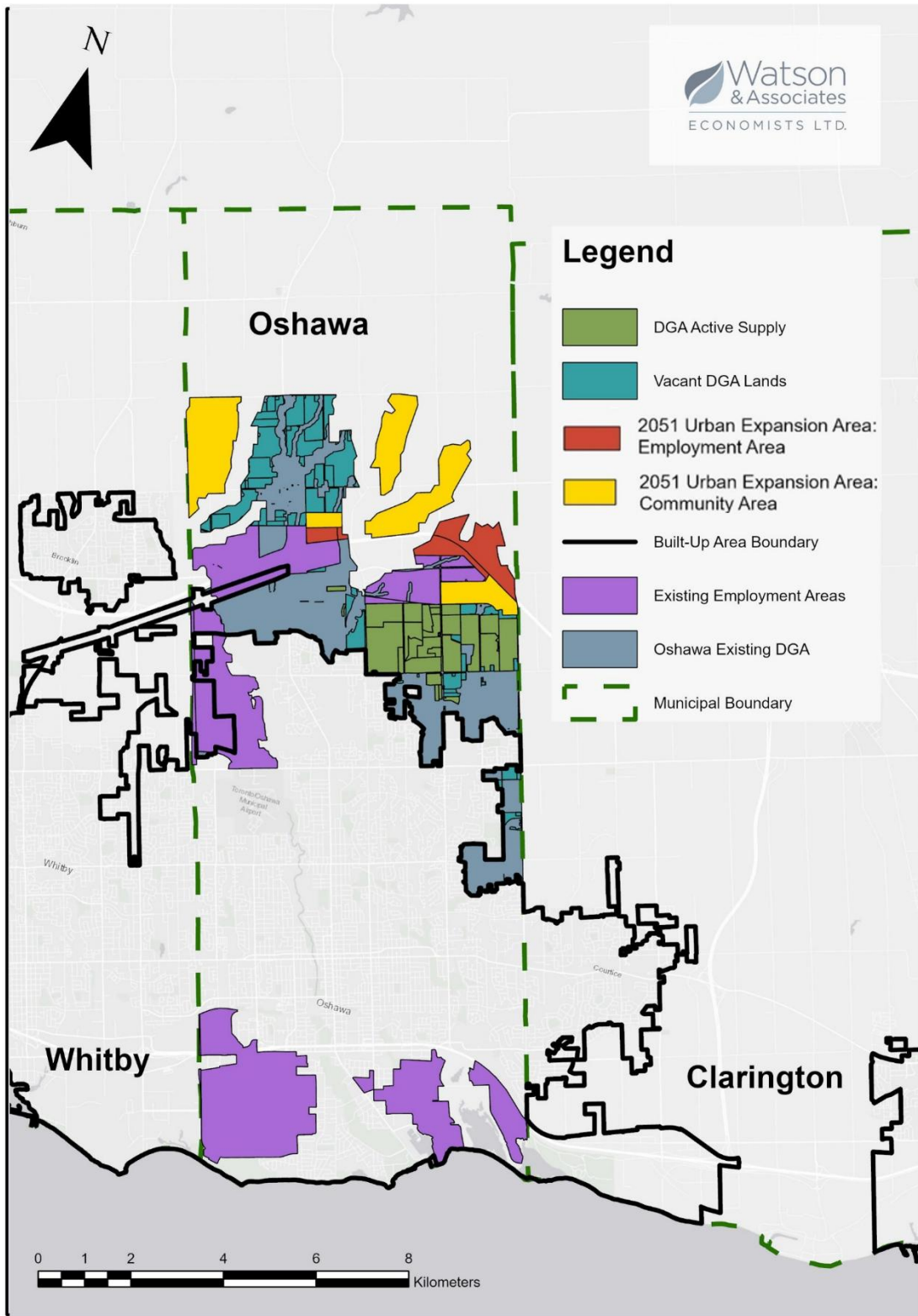
The D.G.A. Community Area (excluding Employment Areas) in the City of Oshawa was shown previously in Figure 7 and primarily encompasses the lands north of the City’s existing B.U.A. boundary. The D.G.A. Community Area encompasses approximately 1,960 gross developable hectares (4,840 acres), including 403 hectares of Community Area “2051 Urban Expansion Areas” identified for Oshawa in Envision Durham.¹⁸ This area comprises a mix of developed and approved lands, existing vacant parcels within the D.G.A., and the 2051 Urban Expansion Areas designated to accommodate future residential, commercial, institutional, and parkland uses.

The density of Community Areas is measured across the entire D.G.A., excluding employment lands and non-developable features.¹⁹ The D.G.A. density includes components of the D.G.A. land supply that already have an established density (developed), as well as vacant lands. Figure 13 provides a map identifying Oshawa’s D.G.A. lands that are either developed, active, or remaining vacant.

¹⁸ These expansion lands, however, are not yet designated in the O.O.P. but are considered as part of the developable supply in the G.M.S.

¹⁹ For the purposes of this analysis, non-developable “takeouts” are defined consistent with section 2.2.7.3 of the former Growth Plan for the Greater Golden Horseshoe (2019, as amended), which identified exclusions such as major infrastructure and key natural heritage features when calculating developable land supply. While the Growth Plan has since been repealed and replaced by the P.P.S., 2024, the P.P.S. does not provide an equivalent definition of takeouts. The application of the Growth Plan’s approach is maintained here for consistency and comparability in L.N.A.s.

Figure 13: City of Oshawa D.G.A. Land by Development Status



Source: Watson & Associates Economists Ltd., based on City of Oshawa G.I.S. data.

4.2 D.G.A. Densities

Through Envision Durham, Regional Council endorsed a land needs scenario that differed from the recommendation of Regional staff and the Consultant Team. This decision resulted in lower forecast greenfield densities, and the corresponding Settlement Area Boundary Expansion (S.A.B.E.) was increased across the southern Durham municipalities. For Oshawa, this resulted in an overall D.G.A. density of 50 people and jobs per ha (P&J/ha) by 2051, resulting in the 403 ha Community Area 2051 Urban Expansion Areas discussed previously. Given this context, reevaluating the D.G.A. density assumptions from Envision Durham is a critical component of this analysis to ensure locally appropriate densities are utilized to understand Oshawa's long-term growth phasing needs.

Figure 14 provides a summary of the estimated densities for Oshawa's developed D.G.A. lands (as of mid-2025), as well as forecast densities on its active and remaining vacant D.G.A. lands. Lands with active applications provide a greater degree of certainty with respect to average forecast residential density, while the type and form of development in the remaining vacant D.G.A. lands, which are not yet known, could have a higher variability in average density levels.²⁰ The following can be observed:

- As of mid-2025, it is estimated that approximately 715 developable ha of land in the City's D.G.A. have been developed. Using 2021 Census data, historical building permit activity, Statistics Canada postcensal updates, and Lightcast employment data, it is estimated that the developed D.G.A. accommodates approximately 42,900 people and jobs, representing 60 P&J/ha.
- Based on the lands in active applications (as shown in Figure 13), approximately 8,700 units remain to be built. Of note, slightly over half of these units are considered high-density units (stacked townhouses or apartments).
 - Stacked townhouses generally achieve higher densities than traditional row housing. For example, a stacked townhouse development with vertical design can reach average densities significantly above traditional row housing. Looking ahead, demographic and market factors suggest continued growth in compact housing forms to meet demand for "missing middle" options.
- Lastly, the remaining vacant lands (including the 2051 Urban Expansion Areas) account for the largest share of D.G.A. land across these categories. It is forecast that the remaining vacant lands will accommodate a large share of low- and medium-density housing.

²⁰ It is also important to recognize that a portion of vacant D.G.A. lands includes lands that fall within Part II Planning Areas.

- Accordingly, a density of 65 P&J/ha is estimated for the active and vacant lands.²¹

Figure 14: City of Oshawa D.G.A. Capacity by Category as of Mid-2025

D.G.A.	Gross Developable Land Area (Hectares)	Population	Jobs	Total People and Jobs	Density: Total People and Jobs per hectare
Developed	715	40,830	2,070	42,900	60
Active Applications and Remaining Vacant Lands (Including 2051 Urban Expansion Areas)	1,245	69,260	11,240	80,500	65

Source: Watson & Associates Economists Ltd., 2025.

4.3 Land Needs Assessment, 2056

As identified in Envision Durham, the City of Oshawa requires an urban expansion of 403 hectares (approximately 1,000 acres) to support population and employment growth in the D.G.A. Community Area by 2051. As discussed previously, this G.M.S. has extended the growth forecast to 2056, updated the vacant land supply, and reassessed the densities identified in Envision Durham. Based on this analysis, Figure 15 provides an updated L.N.A. for the City of Oshawa to 2056. The following can be observed:

- Based on the developed, active, and remaining vacant lands, Oshawa’s D.G.A. is estimated to have a capacity of 123,400 people and jobs.
- It is forecast that the City will need to accommodate 62,900 people and 10,300 jobs in the D.G.A. by 2056, totalling 73,200 people and jobs.
- When considering the developed land area and forecast for new development, it is estimated that Oshawa’s D.G.A. will contain 116,100 people and jobs by 2056, accounting for 1,855 hectares.
 - The overall estimated density by 2056 is 63 P&J/ha, representing a more accurate estimate of densities in the Oshawa D.G.A. compared to the forecast of 50 P&J/ha through Envision Durham. The density of 63 P&J/ha represents the combined densities of the developed (60 P&J/ha) and active/vacant (65 P&J/ha) D.G.A. Community Area lands.
- As shown in Figure 15, it is forecast that the City will have a surplus of approximately 105 hectares of land by 2056, with an ability to accommodate an additional 7,300

²¹ For example, these residential densities are largely consistent with the minimums identified in the May 10, 2023, Preferred Land Use Concept from the Integrated Columbus Part II Planning Act & Municipal Class EA Study.

people and jobs. This 105-ha surplus can account for both the lands within the existing boundary and the 2051 Urban Expansion Areas. Within the existing boundary, it is likely that some lands will remain vacant over the forecast horizon due to physical, environmental, servicing, or market constraints. This includes limitations related to parcel configuration, infrastructure and environmental conditions, landowner intentions, and the timing of land servicing or marketing.

- Accordingly, under a five to ten per cent land vacancy adjustment, existing urban lands could account for approximately 40 to 90 hectares, respectively, of the 2056 surplus. A higher level of land vacancy being observed in the existing Oshawa D.G.A. would signify that nearly all of the 2051 Urban Expansion Areas could be required over the planning horizon to accommodate growth.
- As shown, it is assumed that the 105-ha surplus will contain higher overall densities. This indicates that, over the longer term, densities are forecast to continue rising in Oshawa.

Figure 15: City of Oshawa D.G.A. Community Area Land Needs to 2056

Category	Land Area (ha)	People and Jobs	People and Jobs Per Developable ha
Total Existing D.G.A. Community Area	1,960	-	-
Developed (as of Mid-2025)	715	42,900	60
Active and Vacant Lands	1,245	80,500	65
Forecast, 2025 to 2056	1,140	73,200	-
Total D.G.A. Community Area at 2056	1,855	116,100	63
D.G.A. Community Area Surplus	105	7,300	69

Source: Watson & Associates Economists Ltd., 2025.

As noted previously, the land needs scenario through Envision Durham utilizes low forecast densities, which resulted in significant urban expansion for Oshawa. This 403 ha expansion has been embraced through Envision Durham and is now included as part of Oshawa’s existing D.G.A. land area for this exercise. The identification of a surplus for both 2051 and 2056 indicates that Oshawa can accommodate its forecast without requiring development in all areas of the D.G.A. (both existing and expansion), underscoring the need for a phasing plan to guide growth in a strategic and financially sustainable manner. Consistent with this, section 2.3.1 of the P.P.S. highlights the importance of phasing policies to ensure that D.G.A. development, including areas added through settlement expansion, proceeds in an orderly way with the timely provision of infrastructure and public services. This phased approach prevents the overextension of resources, aligns service delivery with growth, and maintains sustainable development patterns, and will be the focus of analysis in Phase 3 of the Oshawa G.M.S.

5 Policy Recommendations

This chapter offers policy recommendations for Oshawa's O.P.R., aiming to promote sustainable, complete communities and effective growth management. The recommendations address legislative conformity and best practices requirements as well as local needs based on the technical analysis completed for the L.N.A. Policy options are also provided for the City's consideration, which strike an appropriate balance between intensification and D.G.A. expansion, encourage a range of housing options, and identify growth management policies to guide the City's evolution through 2056. Further topic-based policy recommendations are in the supporting Employment Lands Strategy, Intensification Strategy, and Growth Phasing and Urban Expansion Options Reports.

5.1 Growth Forecasting

The population and employment growth projections to 2056, as detailed in Chapter 3, have informed the development of the policy recommendations presented in this report, which are designed to guide the City's land use and infrastructure planning. Accordingly, the O.O.P. should integrate these forecasts as a key contextual foundation underpinning the updated policies.

5.1.1 Presentation of Population and Employment Forecasts

The in-effect O.O.P. identifies outdated urban population, rural population, and employment forecasts to 2031. Additionally, contemporary O.P. growth forecasts are typically set for entire municipalities, as targeting urban or rural populations separately creates unnecessary complexity in implementation and monitoring, given that urban growth, which represents the vast majority of overall growth in Oshawa, must be directed to urban areas.

Recommendation: It is recommended to replace the existing 2031 forecasts with population and employment forecasts on a City-wide level to 2056, consistent with section 3.1 of this L.N.A.

5.1.2 Housing Forecasts and Targets

The in-effect O.O.P. identifies housing forecasts at a City-wide level. As part of the G.M.S., technical analysis was completed to identify the housing forecasts by structure and type.

Recommendation: It is recommended to include housing forecasts on a City-wide level to 2056, as per this L.N.A.

Option: The City may wish to identify housing forecasts by structure and type (i.e., low density, medium density, and high density). This can support long-term infrastructure planning and the identification of potential housing supply gaps, allowing for targeted policies. It should be noted, however, that housing demand can shift based on a range of factors such as market

trends, economic variables, and federal policies, so frequent updates and ongoing monitoring are required.

5.1.3 Affordable Housing Targets

While not forecast through this L.N.A., affordable housing targets are crucial for supporting a range and mix of housing options, fostering complete communities, and promoting equity.

Through Official Plan Amendment (O.P.A.) 179, the in-effect O.O.P. sets out a baseline City-wide minimum 25% affordable housing target, resulting from new residential development and residential intensification through non-residential conversion, residential infill and residential development across the City (O.O.P. Policy 6.2.2). This target, however, may be increased when substantiated through the findings of a Municipal Housing Statement. This policy is consistent with Envision Durham and should be carried forward.

Section 2.2 of the P.P.S. requires municipalities to plan for providing a variety of housing options and densities, including affordable housing, to meet the forecast needs of current and future residents within the regional market area. Municipalities are also expected to set minimum targets for affordable housing for low- and moderate-income households.

Section 3 of Envision Durham sets out policies to increase the provision of affordable housing to support complete communities, requiring that at least 25% of all new residential units produced throughout the region and 35% of all new residential units in S.G.A.s to be affordable to low- and moderate-income households (Envision Durham, Policy 3.1.20 and Policy 3.1.21).

Recommendation: It is recommended to carry forward a minimum target of at least 25% of all new residential units to be affordable to low- and moderate-income households.

Recommendation: It is recommended to set a minimum target of at least 35% of all new residential units to be affordable to low- and moderate-income households within S.G.A.s.

5.2 Settlement Areas & Urban Areas

Settlement Areas are parts of the City where development is already concentrated with a mix of land uses or have been designated in an O.P. for development over the long term.

Settlement Areas consist of Urban Areas and Rural Settlements. Urban Areas are parts of a city where growth is concentrated and make efficient use of existing and/or planned supporting infrastructure (e.g., municipal sewage services, municipal water services, public service facilities, etc.). Defining the boundary around urban areas and limiting growth outside of them helps protect the City's natural heritage system and agricultural system, while optimizing the use of existing infrastructure and supporting the achievement of complete communities.

5.2.1 Defining Urban/ Settlement Area Boundaries

The in-effect O.O.P. identifies the Boundary of the Major Urban Area and illustrates this on Schedules "A" and "A-2". Additionally, Envision Durham identifies the Urban Area Boundary,

Delineated Built Boundary and the 2051 Urban Expansion Areas, as well as Rural Settlements, consisting of a Hamlet and Country Residential Subdivisions for the City.

Through this L.N.A., it was determined that the 2051 Urban Expansion Areas, including employment and community lands, should be developed in a phased manner. As identified in Chapter 4, Oshawa does not require the entirety of the Envision Durham 2051 Urban Expansion Areas by 2051, as the City is forecast to have a 105 ha surplus by 2056. This surplus underscores the need for a phasing plan to guide development of the existing D.G.A. and S.A.B.E. lands to 2056 and beyond. Phase 3 of this G.M.S. will provide a phasing plan to guide future development in Oshawa.

Recommendation: It is recommended to include all Settlement Area boundaries identified in Envision Durham, inclusive of the Urban Area Boundary, Hamlet (Raglan) and Country Residential Subdivisions.

Recommendation: It is recommended to use the Delineated Built Boundary identified in Envision Durham. For clarity and consistency with related terminology used in the P.P.S., it is recommended to refer to the Delineated Built Boundary as the Built-Up Area Boundary in all O.O.P. schedules.

Recommendation: It is recommended to include the 2051 Urban Expansion Areas identified in Envision Durham.

5.2.2 Settlement Area Boundary Expansions

The P.P.S. has removed the historical Municipal Comprehensive Review (M.C.R.) process for lands that are not subject to Provincial Plans. Previously, Settlement Area Boundary Expansions were permitted only at the time of an M.C.R. undertaken by a planning authority. While expansions can theoretically now be initiated by the City or through a privately-submitted O.P.A. application, Envision Durham recently brought all former “Whitebelt” lands into the City’s Settlement Area, identifying them as the 2051 Urban Expansion Areas.²² All other remaining lands within the City’s geographic limits are subject to the Provincial Greenbelt Plan and Oak Ridges Moraine Conservation Plan (O.R.M.C.P.).

All O.O.P. S.A.B.E. policies and references to M.C.R.s will therefore need to be removed or adapted for consistency with the P.P.S., including removing reference to the historical M.C.R. process. Furthermore, there is no opportunity for expansion of the Settlement Area as the former Whitebelt lands were brought into the delineated Settlement Area Boundary through Envision Durham as the 2051 Urban Expansion Areas.

²² “Whitebelt” lands refer to greenfield areas between the existing settlement area and protected Greenbelt Plan areas. “Whitebelt” lands are not subject to the Greenbelt Plan and are outside the urban boundary, but within the City’s municipal boundary. These lands often act as an urban reserve and are considered for urban expansion if justified by projected growth.

As a longstanding urban municipality, limited Settlement Area expansion opportunities remain in Oshawa. This L.N.A. anticipates that the 2051 Urban Expansion Areas lands are more than sufficient to accommodate projected growth over the long term and that feasible growth management densification and intensification options exist, which can further contribute to the City's land supply and promote enhanced fiscal and broader sustainability goals. Accordingly, a phasing strategy is being explored through the G.M.S. to ensure orderly, logical, and sustainable future development within the D.G.A.s, aligning with the long-term infrastructure capacity, policy goals, and community needs of the City.

Given that sufficient land supply exists to accommodate projected growth when accounting for the City's existing Settlement Area and the recommendation to adopt the 2051 Urban Expansion Areas, the G.M.S. does not contemplate a scenario where there is a demonstrated need to consider expansion into lands that are subject to the Provincial Greenbelt Plan and O.R.M.C.P.

Recommendation: It is recommended to remove and/or adapt all O.P. policies to reflect the Province's removal of the M.C.R. process for lands that are not subject to Provincial Plans (i.e., Provincial Greenbelt Plan and O.R.M.C.P. with respect to the City of Oshawa).

Option: The City may wish to add a policy stating that the new Urban Area boundary is not subject to change and that the City will not consider requests for boundary expansions. This approach would reflect that the growth management work has been undertaken, and the land needs of the City are met by the existing Urban Area lands and the 2051 Urban Expansion Areas.

5.2.3 Designated Growth Areas Development Densities

The in-effect O.O.P. sets out a minimum gross density target of 50 residents and jobs combined per gross hectare, across the entire greenfield area, when fully built (O.O.P., Policy 1.8).

Envision Durham provides guidance on greenfield development in section 5.4 and directs municipalities to plan for a minimum density target of not less than 53 people and jobs per gross hectare (Envision Durham, Policy 5.4.5.1).

The P.P.S. encourages municipalities to set a minimum density target for the D.G.A. of 50 people and jobs per gross hectare (P.P.S., Policy 2.3.1.5). It should be noted that the P.P.S. uses the term "Designated Growth Area" to refer to greenfield areas.

Through this L.N.A., the City-wide D.G.A. density is forecast at 63 people and jobs per gross hectare by 2056.

Recommendation: It is recommended to use "Designated Growth Areas" in reference to greenfield areas to be consistent with the P.P.S.

Recommendation: It is recommended to identify the Designated Growth Areas on a schedule in the O.O.P. The 2051 Urban Expansion Areas, as shown in Envision Durham, should be identified as Designated Growth Areas. This enables a policy framework to contemplate the delineated D.G.A.s and provide direction regarding the future development.

Recommendation: It is recommended to include a minimum density target of 63 people and jobs per gross hectare. Establishing a minimum density target can help ensure that growth in greenfield areas achieves the assumed growth in the forecasting scenario.

5.2.4 Growth Management, City Structure & Urban Area Hierarchy

Growth is encouraged to be directed to urban areas, with priority given to urban areas that support active transportation, provide for complete community needs and are well served by transit. Clearly articulating a City Structure and Urban Area hierarchy is helpful both for increased clarity and to guide the City's growth in a manner that ensures that transportation, infrastructure, and public service facilities are planned and coordinated to support the creation and reinforcement of sustainable, complete communities.

The in-effect O.O.P. does not contain a dedicated growth management section but does identify City structural elements consisting of urban (i.e., Urban Settlement Areas), rural (including Rural Settlements/Rural Settlement Areas) and Greenland areas. Envision Durham similarly identifies structural elements consisting of the Urban System, Rural System, Greenlands System, and Transportation System.

The in-effect O.O.P. provides guidance on growth levels in specific hierarchical urban areas (e.g., Downtown Oshawa Urban Growth Centre, Downtown Main Central Area) but does not include City-wide policies for where the highest and lowest levels of growth are to occur.

Schedule "A", Land Use, of the in-effect O.O.P. combines land use designations and various structural and hierarchical components. Contemporary best practice typically includes a clear schedule or schedules that focus on illustrating the Municipal Structure and Urban Area hierarchy (i.e., exclusive of land use designations). Land use designations are then shown on a separate schedule, which may also illustrate selected City Structure and Urban Area Hierarchy elements. Additionally, most municipalities include a dedicated section in their O.P. for growth management, which includes or is linked to policies regarding their municipal structure and urban hierarchy.

The following Urban Area Hierarchy elements are applicable to Oshawa, including the Urban Area Boundary, Community Areas, Employment Areas, Strategic Growth Areas, and D.G.A.s. Additional information on the Urban Area hierarchy and a description of each component are included in Figure 16.

Figure 16: Proposed Urban Area Hierarchy and Descriptions for the City of Oshawa

Proposed Component	Description
Urban Area Boundary	Identify urban areas and rural settlement areas within Oshawa, including lands which have been designated for development over the long term.
Community Areas	Areas that offer a well-rounded living environment for the residents of Durham; mixed-use neighbourhoods or areas that enable access to daily needs.
Employment Areas	Areas of Employment per the P.P.S. definition.
Strategic Growth Areas	Settlement areas, nodes, corridors, and other areas that have been identified by municipalities to be the focus for accommodating intensification and higher-density mixed uses in a more compact built form.
Centres	Regional Centres identified in Envision Durham and local centres.
Downtown Oshawa	Urban Growth Centre (U.G.C.) identified in Envision Durham.
P.M.T.S.A.s	P.M.T.S.A.s identified in Envision Durham.
Corridors	Rapid Transit Corridors and Regional Corridors identified in Envision Durham. Local Corridors as requested by the City.
Designated Growth Areas	2051 Urban Expansion Area identified in Envision Durham.

Recommendation: It is recommended to create separate schedules which clearly show the City Structure and Urban Area hierarchy components, in addition to a land use designation schedule, which may include some City Structure and Urban Area hierarchy components. This will improve the legibility of the maps for users and recognize that the City Structure and land use designations are separate elements with distinct functions.

Recommendation: It is recommended to establish minimum density targets for components of the Urban Area hierarchy; additional direction is provided in section 5.3.

Recommendation: It is recommended to establish minimum targets for intensification and redevelopment within built-up areas; additional direction is provided in section 5.3.

5.2.5 Residential Growth

Planning for a growing population and a greater number of households means ensuring that the City has enough land designated for residential uses (i.e., housing) that can be brought online in a reasonable timeframe to accommodate the anticipated demand.

The in-effect O.O.P. includes a policy that the City shall endeavour to maintain growth within the Major Urban Area for a minimum of 10 years through intensification, redevelopment, and if necessary, on lands designated and available for residential development, to meet the future housing requirements of the anticipated population growth within the City (O.O.P., Policy 6.1.2).

Section 5.7 of Envision Durham requires municipalities to update their O.P.s to ensure that sufficient lands are designated to accommodate projected growth needs to the 2051 horizon. Envision Durham also implements P.P.S. Policy 2.1.4. b) which directs municipalities to maintain a minimum 15-year supply of land for residential development through residential intensification and redevelopment, within Settlement Areas and, if necessary, Urban Area Boundary expansion (Envision Durham, Policy 3.1.2).

The P.P.S. also directs planning authorities to maintain at all times, where new development is to occur, land with servicing capacity sufficient to provide at least a three-year supply of residential units available through lands suitably zoned, including units in draft approved or registered plans (P.P.S., Policy 2.1.4. a). Through O.P.A. 179 the in-effect O.O.P. was updated to state that the City will endeavour to maintain land with sufficient servicing capacity to provide a minimum three year supply of residential units available through a combination of draft approved and/or registered lots and blocks in plans of subdivision/condominium in new residential developments, on vacant residentially zoned land, and through intensification and redevelopment (O.O.P., Policy 6.1.4).

Recommendation: It is recommended that the existing O.O.P. policy be updated by establishing a new policy that requires the City to maintain a 15-year supply of lands designated and available for residential development.

Recommendation: It is recommended to carry forward the policy that the City maintain land with sufficient servicing capacity to provide at least a three-year supply of residential units available through lands suitably zoned.

5.3 Intensification

Intensification, in the context of this report, refers to residential growth in the B.U.A. of the City, rather than development in new greenfield areas. The associated Intensification Strategy provides further direction on the scale and types of intensification suitable in Oshawa, including intensification targets and policies. Intensification is an important planning tool to support the achievement of complete communities and to efficiently use existing municipal infrastructure. Intensification can be achieved through redevelopment, the development of vacant and/or

underutilized lots within previously developed areas, infill development, and the expansion or conversion of existing buildings.

The City of Oshawa can accommodate significant residential growth within its B.U.A. in the form of intensification and higher-density housing in S.G.A.s, and gentle density in existing neighbourhoods. The need for the 2051 Urban Expansion Areas, as identified in Envision Durham for Oshawa, will be influenced by the rate of growth resulting from intensification.

The P.P.S. directs planning authorities to establish and implement minimum targets for intensification and redevelopment within built-up areas, based on local conditions (P.P.S., Policy 2.3.1.4).

The in-effect O.O.P. requires that a minimum of 39% percent of all new residential dwelling units in the City annually must be built within the Built Boundary. Envision Durham requires area municipal O.P.s to provide intensification strategies that implement the Region's intensification targets; Oshawa's Envision Durham intensification target is to accommodate 50% of all new development within the B.U.A. (Envision Durham, Policy 5.1.14). The current 50% target requires that half of all new dwellings in Oshawa, forecast to amount to approximately 22,000 units between 2025 and 2056, be built within the City's delineated B.U.A.

Recommendation: It is recommended to set an intensification target requiring 50% of all new residential dwellings to be built within the B.U.A. to 2056.

Option: The City of Oshawa may wish to consider adding monitoring policies to track growth at a City-wide level, as well as across different components of the urban structure. Monitoring policies ensure that intensification targets are being measured and evaluated, so the City can confirm targets are being met and plan appropriately for future growth needs (e.g., infrastructure, services, etc.).

5.4 Strategic Growth Areas & Density Targets

S.G.A.s are intended to be the focus of growth and development. Municipalities can identify S.G.A.s within the B.U.A., which are to be the focus of intensification, as well as within D.G.A.s, which are to be the focus of higher-density development. The in-effect O.O.P. does not identify S.G.A.s but does identify Intensification Areas and illustrates them on Schedule "A-2", Corridors, along with minimum density targets. It is important to note that S.G.A.s are not land use designations and their delineation does not confer any new or alter existing land use designations (P.P.S., Policy 6.1.11).

Envision Durham identifies different types of S.G.A.s, including an Urban Growth Centre, Regional Centres, P.M.T.S.A.s and Rapid Transit Corridors in Oshawa. Envision Durham also establishes different density targets based on the S.G.A.'s function and urban context, as shown in Figure 17 (Envision Durham, Policy 5.2.6).

Figure 17: Strategic Growth Area Targets Table from Envision Durham

Strategic Growth Area	Minimum Transit Supportive Density Target (people and jobs per gross hectare)
Urban Growth Centres	200
Regional Centres (located along the Rapid Transit Corridor)	150
Regional Centres (located off the Rapid Transit Corridor)	100-150
Protected Major Transit Station Areas	150*
Rapid Transit Corridor	150

*Notwithstanding the above, the Oshawa GO/VIA Protected Major Transit Station Area will be planned to achieve a minimum density target of 25 people and jobs per gross hectare.

Generally, Envision Durham’s minimum density targets are consistent with the P.P.S., including 150 people and jobs per hectare for the P.M.T.S.A.s along the Lakeshore East GO, with the exception of the Oshawa GO/VIA P.M.T.S.A. for which an approved alternative minimum density target of 25 people and jobs per hectare has been applied owing to area-specific constraints.

In accordance with the P.P.S. and Envision Durham, Oshawa delineated the boundaries of two P.M.T.S.A.s on higher-order transit corridors through O.P.A. 233, which was adopted by City Council on June 23, 2025, but requires approval from the Province in its role as the approval authority in this instance. The two stations anchor the Central Oshawa P.M.T.S.A. and Thornton’s Corners P.M.T.S.A.

The City will need to include S.G.A.s and associated policies, including density targets, that are consistent with Envision Durham and the P.P.S. The City may wish to include additional S.G.A.s, policies, and higher density targets in the O.O.P.

Recommendation: It is recommended to establish S.G.A.s as part of the City’s new urban structure to prioritize locations for the highest and most concentrated growth, including the S.G.A.s identified in Envision Durham.

Recommendation: It is recommended to include density targets for the S.G.A.s that were identified in Envision Durham.

Recommendation: It is recommended to include built form policies to guide development, redevelopment, and, where applicable, intensification in S.G.A.s. The O.O.P. can build upon the Envision Durham policies for S.G.A.s, and further recommendations are provided in the associated Intensification Strategy as part of the Growth Management Study.

Option: The City of Oshawa may wish to identify additional P.M.T.S.A.s for future higher-order transit station areas and station areas that were not delineated by Envision Durham (e.g., Downtown Oshawa - Durham-Scarborough Bus Rapid Transit).

5.5 Growth Monitoring

Envision Durham recognizes the importance of reviewing and monitoring the performance of the Plan. Specifically, section 11.5 states that “reviewing and monitoring the Regional Official Plan is a critical function of long-range planning” to measure the effectiveness of policies, identify emerging trends, and monitor implementation. It is the policy of Council to undertake comprehensive reviews of the Plan, ensure conformity with the P.P.S., and provincial plans, and to “monitor key indicators, in consultation with the area municipalities, on a regular basis,” including population and employment forecasts, region-wide intensification, density targets in S.G.A.s, the range and mix of housing options including affordability, and the supply and servicing of Employment Areas.

This L.N.A. report informs long-term planning by identifying future growth, land supply, and demand, thereby shaping a policy framework to manage growth effectively.²³ Policies for monitoring and evaluation are needed to assess forecasts regularly, guiding reviews and updates to align with P.P.S., and support sustainable land use and growth. They can also allow the City to adjust growth goals based on real-time data, considering planning, demographic, and economic factors shaping long-term change.

Recommendation: A growth monitoring framework should be incorporated to provide a clearer understanding of recent growth trends and insights into the potential broad-reaching impacts of urban growth. Ultimately, such tools would generate greater growth management efficiencies within the City when responding to changes in real estate market conditions, development pressures, and provincial planning policy direction.

Recommendation: Consider various tools for monitoring housing growth, including comprehensive and interactive growth tracking/growth management models to monitor population, housing, and employment growth, intensification, development applications, servicing capacity, and density, as well as other performance measures and benchmarking at sub-geographical levels, such as the planning policy area, on an annual basis.

Watson has recently established a comprehensive web-based population, housing, and employment growth monitoring/management tool for several Ontario municipalities. Through the Oshawa G.M.S., Watson will provide the City with complimentary access to this tool, which will build upon the analysis and findings of this study. This tool is designed to answer the following questions for Oshawa:

- Where is residential and non-residential development occurring, and how is it tracking to planned growth?
- What are the recent trends in housing and employment sectors across different areas?

²³ Details on intensification and employment will be provided through the E.L.S. and Intensification Strategy.

- What is the rate of population, housing, and employment growth, and how has it changed over time?
- How are development applications progressing, and how many years of growth remain in the approvals pipeline?
- When might infrastructure-based growth constraints emerge in Settlement Areas?

6 Conclusions

This L.N.A. Report provides a forward-looking framework for accommodating Oshawa's population and employment growth to 2056. The analysis extends the Envision Durham allocations, considers updated demographic and economic conditions, and reassesses D.G.A. densities to reflect local development realities. The findings confirm that Oshawa has sufficient capacity within its D.G.A. lands, including the 403 hectares of expansion added through Envision Durham, to meet its long-term growth requirements. Moreover, the assessment demonstrates that the City is likely to carry a modest D.G.A. Community Area land surplus to 2056, reinforcing the importance of careful staging and phasing. The Columbus Part II Planning Area was the City's most recent and last remaining greenfield area to be planned for development outside of the Urban Expansion Area. With this area now largely committed, Oshawa's next opportunity and challenge is to structure how development in existing D.G.A. locations (accounting for potential land vacancy) and in the newly designated Urban Expansion Area will be implemented in phases.

A central theme of this report is the balance between intensification and greenfield development. Forecast growth in the D.G.A. will largely be met through low- and medium-density housing supported by local-serving employment, ensuring that Oshawa can accommodate a diverse population while meeting provincial density targets. This dual role highlights the need to align growth with infrastructure delivery, financial sustainability, and community-building objectives.

Looking forward, the City's capacity to effectively manage growth will depend on implementing a clear phasing strategy. Such an approach will ensure that new development proceeds in an orderly manner, avoids premature servicing costs, and supports complete community outcomes. By coordinating urban expansion with intensification, housing choice, and employment opportunities, Oshawa can continue to position itself as a competitive and livable city within the G.G.H. Establishing a growth monitoring framework, supported by interactive tools such as Watson's web-based model, will provide the City with timely data to track development patterns, infrastructure capacity, and policy performance. This capacity for continuous monitoring and evaluation will enable Oshawa to adapt to changing conditions and maintain alignment with provincial planning direction.

In summary, this L.N.A. provides a foundation for Oshawa's O.P.R., ensuring that the City can accommodate forecast growth to 2056 within a sustainable and locally tailored framework. The results emphasize that while Oshawa has adequate land to meet its needs, the more significant challenge will be managing the timing, location, and form of growth to ensure that the benefits of urban expansion are realized without compromising fiscal responsibility or community well-being.

7 Acronyms & Abbreviations

- Additional Residential Unit (A.R.U.)
- Background Discussion Paper (B.D.P.)
- Designated Growth Area (D.G.A.)
- Employment Land Employment (E.L.E.)
- Geographic Information Systems (G.I.S.)
- Greater Golden Horseshoe (G.G.H.)
- Greater Toronto and Hamilton Area (G.T.H.A.)
- Gross Domestic Product (G.D.P.)
- Growth Management Study (G.M.S.)
- Growth Plan for the Greater Golden Horseshoe (the Growth Plan)
- Land Needs Assessment (L.N.A.)
- Major Office Employment (M.O.E.)
- Ministry of Finance (M.O.F.)
- Ministry of Municipal Affairs and Housing (M.M.A.H.)
- Municipal Comprehensive Review (M.C.R.)
- Non-permanent residents (N.P.R.)
- Oak Ridges Moraine Conservation Plan (O.R.M.C.P.)
- Official Plan (O.P.)
- Official Plan Amendment (O.P.A.)
- Official Plan Review (O.P.R.)
- Oshawa Official Plan (O.O.P.)
- Persons per Unit (P.P.U.)
- Protected Major Transit Station Area (P.M.T.S.A.)
- Provincial Planning Statement (P.P.S.)
- Regional Official Plan (R.O.P.)