

MUNICIPALITY OF NORTH MIDDLESEX

Population, Housing, Employment and Land Needs Brief

EXECUTIVE SUMMARY

This document consolidates the information specific to the Municipality of North Middlesex from the Middlesex County Growth Analysis Update – Final Report (April 25, 2025) and from supporting analysis undertaken in Spring 2025 prepared by Watson & Associates Economists. This document is intended to serve as a single reference for the Municipality across both sources.

The Middlesex County Growth Analysis Update – Final Report (April 25, 2025) provides the long-term population, housing and employment projections for the County and local municipalities to 2056. This study was endorsed by County Council, and these projections were included in the County Official Plan by way of Amendment No. 4, which was Ministry approved on June 5, 2026.

Supporting analysis was undertaken in April 2026 to evaluate the Municipality of North Middlesex's ability to accommodate forecasted residential growth within Settlement Areas to 2056 and provides projected land needs based on projected growth and the current development landscape locally. This document draws on that analysis.

GROWTH ANALYSIS SUMMARY – MUNICIPALITY OF NORTH MIDDLESEX

- As of 2021, the Municipality of North Middlesex had an existing population that accounted for approximately 8% of the County-wide population.
- The population of North Middlesex is forecast to reach approximately 9,300 residents by 2056, accommodating approximately 4% of the County's population growth over the forecast horizon under the Medium-High Population Growth Scenario.
- North Middlesex is anticipated to experience an average annual population growth rate of 1.0% over the next 35 years, which is considerably higher than the rate of growth observed over the previous 20-year Census period.
- To accommodate anticipated permanent population growth, North Middlesex will require an average of 35 new dwelling units annually over the next 35 years.
- Over the 2021 to 2051 forecast period, the anticipated housing mix is:
 - 80% low-density housing (single detached and semi-detached dwellings);
 - 15% medium-density housing (townhouses); and
 - 5% high-density housing (apartments).
- The Municipality's employment base is forecast to reach approximately 3,400 jobs by 2056, accommodating approximately 4% of the County's employment growth over the forecast horizon under the Medium Employment Growth Scenario.
- Employment is anticipated to grow at an average annual rate of 0.9%, which is slightly higher than the employment growth rate observed between 2006 and 2024. Approximately 45% of future employment growth is expected to be population-related employment, including sectors such as retail services and education services.

For reference, Figures 5-1 through 5-5 of the Middlesex County Growth Analysis Update present the population, housing, and employment forecasts by Local Municipality.

LAND NEEDS ASSESSMENT

The supporting analysis undertaken in Spring 2025 prepared by Watson & Associates Economists provides context on the Municipality's existing residential housing supply within the development approvals process as of February 28, 2025. The report groups North Middlesex with Southwest Middlesex, Adelaide Metcalfe, the Village of Newbury and Lucan Biddulph, which together account for approximately 20% of the County's total potential housing supply in residential developments at various stages in the approvals process.

Figure 3-4: Housing Units and Land Area in Residential Development Plans in Settlement Areas — Municipality of North Middlesex

Local Municipality	Residential Units in the Approvals Process	Residential Supply in the Approvals Process (net hectares) [1]	Share of Residential Units in the Approvals Process
North Middlesex	1,109	50	11%
Middlesex County	10,539	440	100%

[1] Excludes environmental features.

Source: Data as of February 28, 2025 from Middlesex County, summarized by Watson & Associates Economists Ltd.

NET-TO-GROSS LAND AREA ASSUMPTION

Watson applies a net-to-gross ratio of 60% to the Municipality of North Middlesex, which assumes that an additional 40% of the land area is required for commercial and institutional uses, parks, roads, and internal infrastructure, and residential lots represent 60% of the land needs.

Figure 3-6: Gross Developable Land Area Components — Newbury Grouping

Component (Adelaide Metcalfe, Lucan-Biddulph, Newbury, North Middlesex, Southwest Middlesex)	Share
Residential Lands	60%
Commercial and Institutional Uses, Local Roads, Infrastructure, and Parkland	40%
Total	100%

Source: Watson & Associates Economists Ltd.

Figure 3-7: Greenfield Vacant Land Supply in Settlement Areas — Municipality of North Middlesex

Local Municipality	Gross Vacant Designated Residential Land (Hectares) [1]	Less Than 5 Hectares	Greater than 5 Hectares (Gross Hectares)	Gross to Net Land Area Reduction (Hectares) [2]	Total Net Vacant Residential Land Supply (Net Hectares)
North Middlesex	38	17	21	9	30
Middlesex County	443	139	332	161	310

[1] Includes vacant land sites with no active development applications. [2] Net vacant lands designated as Residential Neighbourhood Area and within the Urban Area and Community Area boundary identified by Middlesex County, applying a net-to-gross ratio of 45–60% after environmental takeouts for lots greater than 5 hectares.

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

Source: Data provided by Middlesex County, summarized by Watson & Associates Economists Ltd.

Figure 3-8: Total Greenfield Land Supply in Settlement Areas (Excluding Lands Identified for Intensification) — Municipality of North Middlesex

Local Municipality	Residential Land Supply in the Approvals Process (Net Hectares)	Vacant Designated Residential Land (Net Hectares)	Total Residential Land Supply (Net Hectares)
North Middlesex	50	30	80
Middlesex County	428	310	738

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

Source: Data provided by Middlesex County, summarized by Watson & Associates Economists Ltd.

COMMUNITY AREA LAND NEEDS

Watson applied a baseline County-wide residential intensification target of 15%, in accordance with the policy direction in the County Official Plan.

Figure 4-7: Annual Urban Greenfield and Intensification Housing Forecast, 2026 to 2056 — Municipality of North Middlesex

Local Municipality	Greenfield Area (annual units)	Intensification (annual units)
North Middlesex	20	4

Note: Figures may not add precisely due to rounding.

Source: Watson & Associates Economists Ltd.

Figure 4-8: Total Housing Growth by Structure Type in Greenfield Areas, 2026 to 2056 — Municipality of North Middlesex

Settlement Area	Low Density [1]	Medium Density [2]	High Density [3]	Total Residential Units	Annual Residential Units
North Middlesex	480	130	<10	610	20
Middlesex County	15,590	3,510	1,050	20,160	672

[1] Includes single and semi-detached units. [2] Includes townhouses and apartments in duplexes. [3] Includes stacked townhomes and all other apartments.

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

Source: Watson & Associates Economists Ltd.

Figure 4-9: Share of Total Housing Growth by Structure Type in Greenfield Areas, 2026 to 2056 — Municipality of North Middlesex

Settlement Area	Low Density [1]	Medium Density [2]	High Density [3]	Total Residential Units
North Middlesex	79%	21%	<1%	100%

Settlement Area	Low Density [1]	Medium Density [2]	High Density [3]	Total Residential Units
Middlesex County	77%	17%	5%	100%

[1] Includes single and semi-detached units. [2] Includes townhouses and apartments in duplexes. [3] Includes bachelor, 1-bedroom, and 2-bedroom+ apartments.

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

Source: Watson & Associates Economists Ltd.

HOUSING NEEDS

The analysis indicates that short-term residential supply is not constrained in the Municipality, with the three-year housing supply analysis identifying 409 units of draft approved and registered supply (including 11 intensification units) against an annual housing demand of approximately 18 units, resulting in approximately 23 years of supply. For the 15-year housing needs analysis, vacant designated residential lands were converted to housing units using density assumptions by housing type. The following units-per-net-hectare assumptions applied: low density (single-detached / semi-detached) 11 units per hectare; medium density (townhouses) 27 units per hectare; and high density (apartments) 40 units per hectare, producing a blended net density of approximately 19 units per net hectare. Over the long term to 2056, Watson identifies an urban residential surplus for the Municipality of approximately 47 net hectares

Figure 4-10: Three-Year Urban Housing Supply, 2026 to 2029 — Municipality of North Middlesex

Measure	North Middlesex	Middlesex County	Definition
Total Supply of Draft Approved and Registered Units (A)	398	5,048	Draft approved and unbuilt units in registered plans
Intensification Units (B)	11	353	Identified residential intensification supply
Total Supply of Draft Approved and Registered Units in Settlement Areas (C = A + B)	409	5,402	Combined near-term supply
Annual Greenfield Housing Demand (D)	14	714	From 2026–2029 forecast
Annual Intensification Housing Demand (E)	4	118	From 2026–2029 forecast
Annual Housing Demand (F = D + E)	18	832	Total annual demand
Years of Supply (G = C / F)	23	6	Near-term supply horizon

Note: Figures have been rounded. The housing supply includes intensification opportunities.

Source: Watson & Associates Economists Ltd.

Figure 4-11: 15-Year Urban Housing Supply — Municipality of North Middlesex

Measure	North Middlesex	Middlesex County	Definition
Total Residential Supply (A) [1]	80	738	Excludes intensification potential

Measure	North Middlesex	Middlesex County	Definition
Total Housing Demand, 2026 to 2041 (B) [2]	232	9,576	From 2026–2041 forecast, excludes intensification
Net Density (units per net hectare) (C)	19	22	Average density assumption
Net Land Requirements (net hectares) (D = B / C)	12	436	Land needed for demand
Annual Land Demand (E = D / 15)	1	29	Annualized land demand
Residential Land Need — net hectares (Surplus / Shortfall) (F = A – D)	67	302	Positive = surplus
Years of Supply (G = A / E)	96	25	15-year supply horizon

Note: Figures have been rounded. The housing supply includes intensification opportunities.

Source: Watson & Associates Economists Ltd.

Figure 4-12: Long-Term Residential Land Needs, 2026 to 2056 — Municipality of North Middlesex

Measure	North Middlesex	Middlesex County	Definition
Total Greenfield Residential Supply — net hectares (A) [1]	80	733	Excludes intensification potential
Total Housing Demand, 2026 to 2056 — housing units (B) [2]	610	20,160	From 2026–2056 forecast, excludes intensification
Net Density (units per net hectare) (C)	19	22	Average density assumption
Net Land Requirements — net hectares (D = B / C)	33	921	Land needed for demand
Residential Land Need — net hectare, Surplus / Shortfall (E = A – D)	47	-313	Negative = shortfall
Residential Land Need — gross hectare (F = E / 45% or 60%) [3]	-	-659	Newbury at 60% net-to-gross

Note: Residential supply and demand do not include intensification potential. Figures have been rounded and may not add precisely.

Source: Watson & Associates Economists Ltd.

Figure 4-10: Three-Year Urban Housing Supply, 2026 to 2029 — Municipality of North Middlesex

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Source: Watson & Associates Economists Ltd.

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Residential Land Need — net hectares (Surplus / Shortfall) (F = A – D)	67	302	Positive = surplus
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Net Density (units per net hectare) (C)	19	22	Average density assumption
Net Land Requirements — net hectares (D = B / C)	33	921	Land needed for demand

Measure	North Middlesex	Middlesex County	Definition
Residential Land Need — net hectare, Surplus / Shortfall (E = A – D)	47	-313	Negative = shortfall
Residential Land Need — gross hectare (F = E / 45% or 60%) [3]	-	-659	Newbury at 60% net-to-gross

Note: Residential supply and demand do not include intensification potential. Figures have been rounded and may not add precisely.

Source: Watson & Associates Economists Ltd.

APPENDIX A — RESIDENTIAL HOUSING SUPPLY IN DEVELOPMENT APPROVALS

Appendix A presents the residential housing supply in development approvals by Local Municipality, drawing on supporting analysis undertaken in Spring 2025 by Watson & Associates Economists. Figures A-21 through A-25 are the Municipality of North Middlesex tables.

Figure A-21: Municipality of North Middlesex — Intensification Housing Units in Development Approvals by Settlement Areas

Status	Low Density [1]	Medium Density [2]	High Density [3]	Total	Land Area (net hectares)
Registered	–	–	–	–	–
Draft Approved	–	–	–	–	–
Plans Under Review	–	–	–	–	–
Total	–	–	–	–	–

[1] Includes singles and semi-detached houses. [2] Includes townhouses and apartments in duplexes. [3] Includes stacked townhomes and all other apartments.

Note: Figure may not sum precisely due to rounding. Source: Data provided by Middlesex County, summarized by Watson & Associates Economists Ltd.

Figure A-22: Municipality of North Middlesex — Greenfield Housing Units in Development Approvals by Settlement Areas

Status	Low Density [1]	Medium Density [2]	High Density [3]	Total	Land Area (net hectares)
Registered	137	6	–	143	7
Draft Approved	189	66	–	255	14
Plans Under Review	451	260	0	711	29
Total	777	332	0	1,109	50

[1] Includes singles and semi-detached houses. [2] Includes townhouses and apartments in duplexes. [3] Includes stacked townhomes and all other apartments.

Note: Figure may not sum precisely due to rounding. Source: Data provided by Middlesex County, summarized by Watson & Associates Economists Ltd.

Figure A-23: Municipality of North Middlesex — Housing Units in Development Approvals in Settlement Areas

Status	Low Density [1]	Medium Density [2]	High Density [3]	Total	Land Area (net hectares)
Registered	137	6	0	143	7

Status	Low Density [1]	Medium Density [2]	High Density [3]	Total	Land Area (net hectares)
Draft Approved	189	66	0	255	14
Plans Under Review	451	260	0	711	29
Total	777	332	0	1,109	50

[1] Includes singles and semi-detached houses. [2] Includes townhouses and apartments in duplexes. [3] Includes stacked townhomes and all other apartments.

Note: Figure may not sum precisely due to rounding. Source: Data provided by Middlesex County, summarized by Watson & Associates Economists Ltd.

Figure A-24: Municipality of North Middlesex — Housing Units in Development Approvals in Hamlets & Remaining Rural Areas

Status	Low Density [1]	Medium Density [2]	High Density [3]	Total	Land Area (net hectares)
Registered	0	0	0	0	–
Draft Approved	13	–	–	13	6
Plans Under Review	8	–	–	8	2
Total	21	–	–	21	8

[1] Includes singles and semi-detached houses. [2] Includes townhouses and apartments in duplexes. [3] Includes stacked townhomes and all other apartments.

Note: Figure may not sum precisely due to rounding. Source: Data provided by Middlesex County, summarized by Watson & Associates Economists Ltd.

Figure A-25: Municipality of North Middlesex — Housing Units in Development Approvals

Status	Low Density [1]	Medium Density [2]	High Density [3]	Total	Land Area (net hectares)
Registered	137	6	–	143	7
Draft Approved	202	66	–	268	20
Plans Under Review	459	260	–	719	32
Total	798	332	–	1,130	59

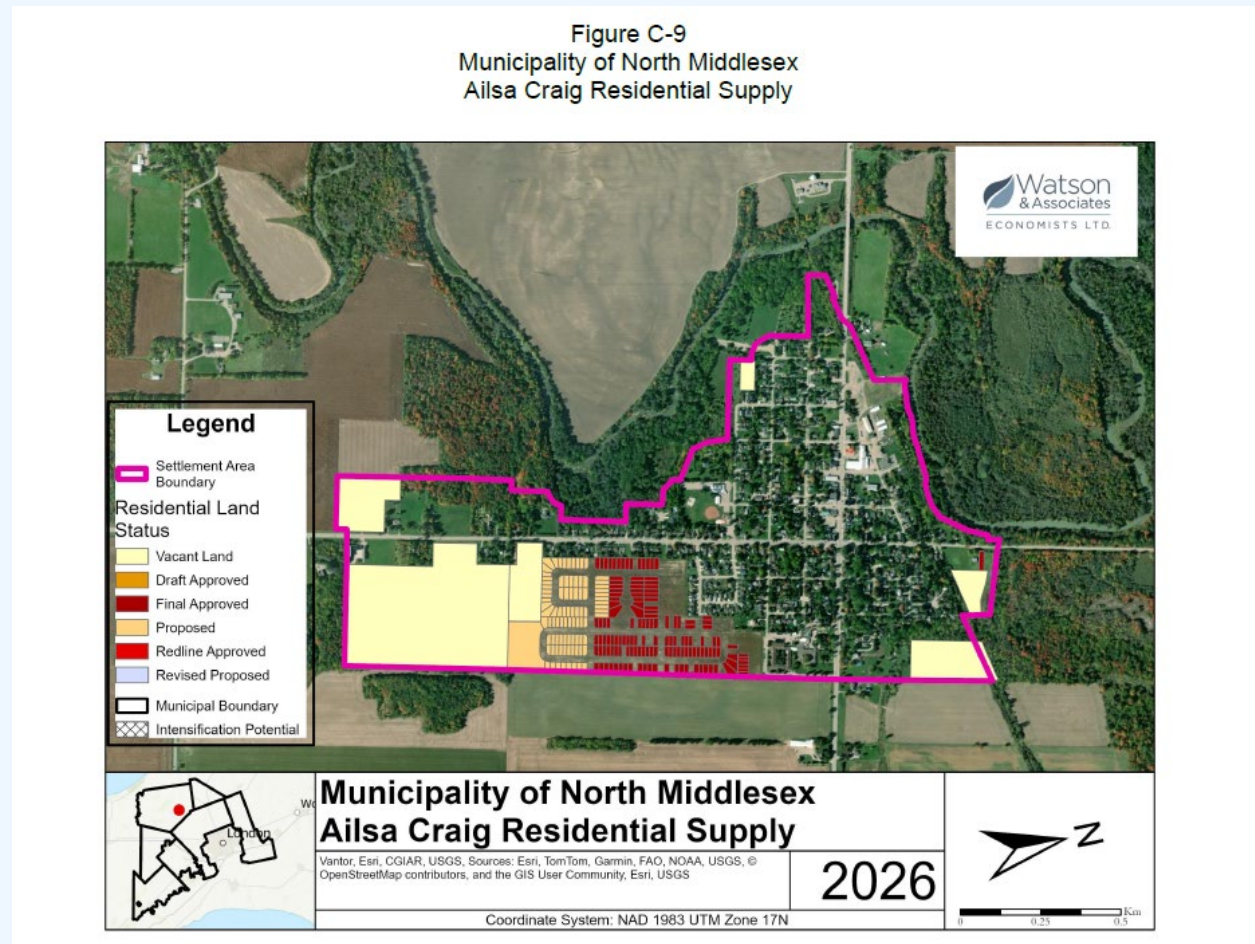
[1] Includes singles and semi-detached houses. [2] Includes townhouses and apartments in duplexes. [3] Includes stacked townhomes and all other apartments.

Note: Figure may not sum precisely due to rounding. Source: Data provided by Middlesex County, summarized by Watson & Associates Economists Ltd.

APPENDIX C — HOUSING SUPPLY BY SETTLEMENT AREA

Appendix C presents residential supply maps by settlement area outlined in the supporting analysis undertaken in Spring 2025 by Watson & Associates Economists. Figure C-8 is the Municipality of North Middlesex map.

Figure C-9: Municipality of North Middlesex — Ailsa Craig Residential Supply



Source: Derived from Middlesex County land supply data by Watson & Associates Economists Ltd.

Figure C-10: Municipality of North Middlesex — Nairn Residential Supply

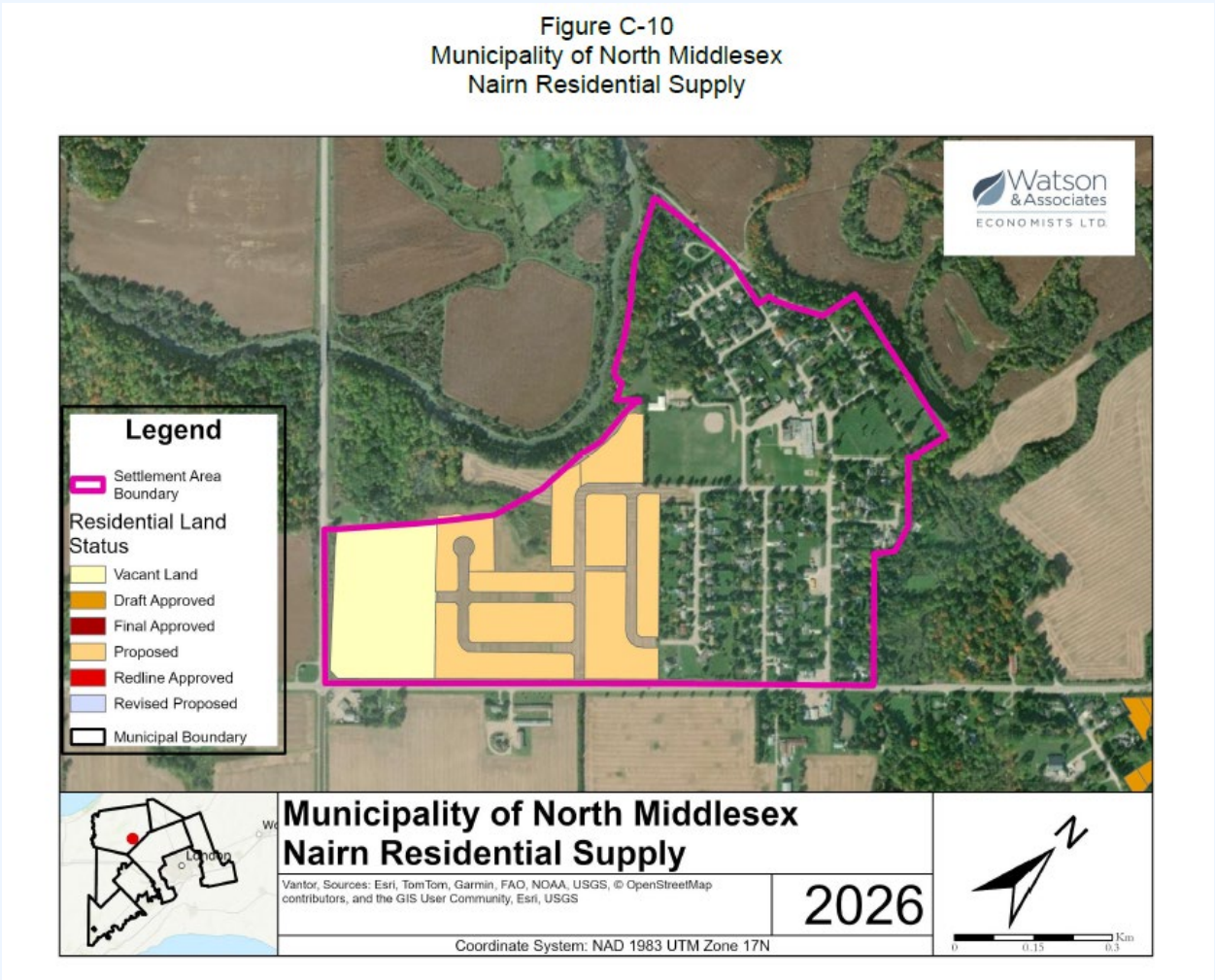
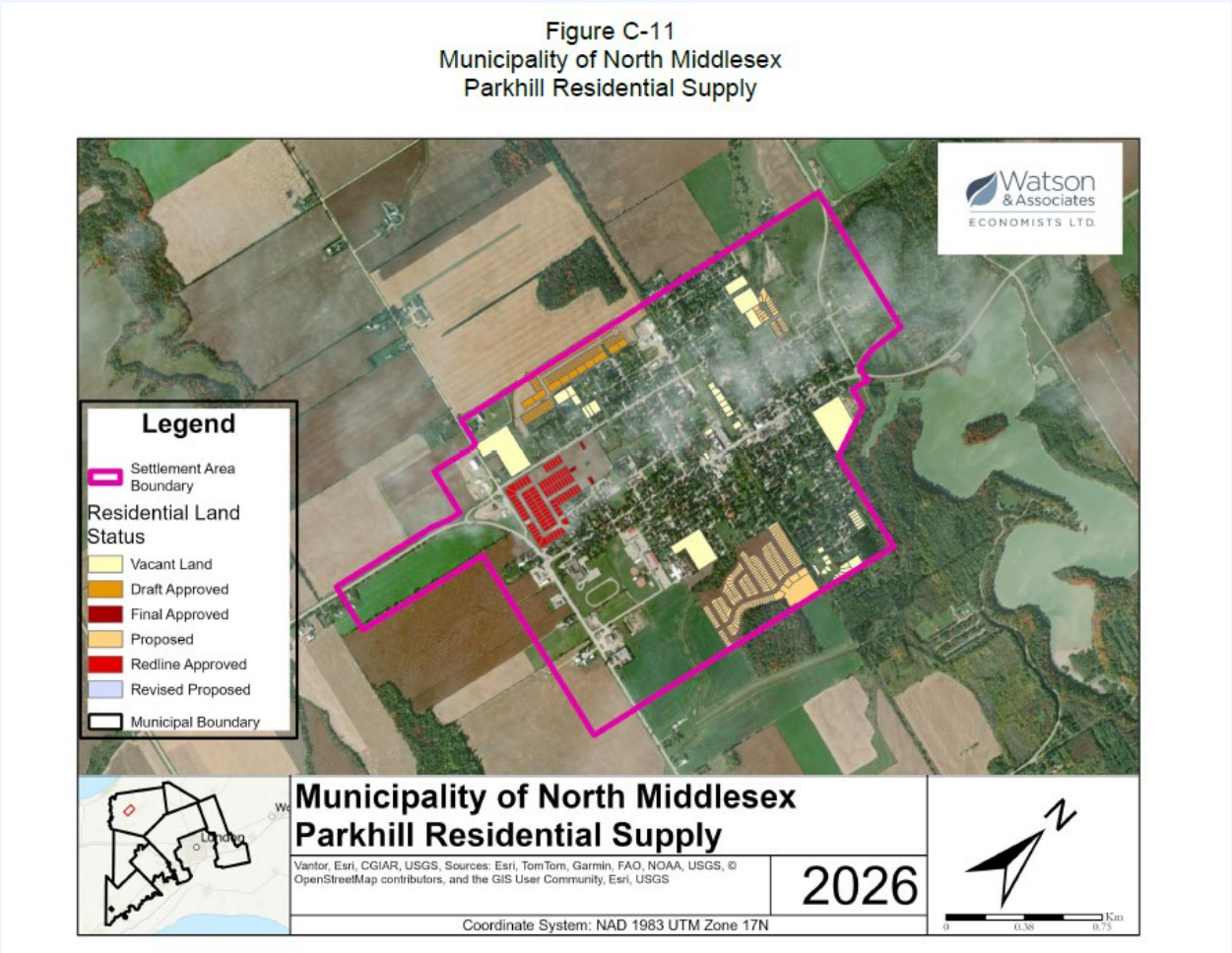


Figure C-11: Municipality of North Middlesex — Parkhill Residential Supply



APPENDIX D — DETAILED RESIDENTIAL HOUSING DEMAND BY LOCAL MUNICIPALITY

Appendix D presents the detailed residential housing demand by Local Municipality, drawing on supporting analysis undertaken in Spring 2025 by Watson & Associates Economists. Figure D-5 is the Municipality of North Middlesex table.

Figure D-5: Municipality of North Middlesex — Residential Housing Demand, 2021 to 2056

Development Location	Timing	Low Density [1]	Medium Density [2]	High Density [3]	Total Residential Units
Settlement Areas					
Settlement Areas	2021 to 2026	10	10	0	10
Settlement Areas	2021 to 2031	60	20	0	80
Settlement Areas	2021 to 2036	120	40	10	170
Settlement Areas	2021 to 2041	200	70	30	300
Settlement Areas	2021 to 2046	300	100	50	440
Settlement Areas	2021 to 2051	390	140	60	590
Settlement Areas	2021 to 2056	490	180	70	740
Hamlets & Remaining Rural Areas					
Hamlets & Remaining Rural Areas	2021 to 2026	100	0	0	100
Hamlets & Remaining Rural Areas	2021 to 2031	190	0	0	190
Hamlets & Remaining Rural Areas	2021 to 2036	280	0	0	280
Hamlets & Remaining Rural Areas	2021 to 2041	350	0	0	350
Hamlets & Remaining Rural Areas	2021 to 2046	410	0	0	410
Hamlets & Remaining Rural Areas	2021 to 2051	450	0	0	450
Hamlets & Remaining Rural Areas	2021 to 2056	490	0	0	490
Municipality of North Middlesex (Total)					
Municipality of North Middlesex	2021 to 2026	110	10	0	120

Development Location	Timing	Low Density [1]	Medium Density [2]	High Density [3]	Total Residential Units
Municipality of North Middlesex	2021 to 2031	250	20	0	270
Municipality of North Middlesex	2021 to 2036	390	40	10	450
Municipality of North Middlesex	2021 to 2041	550	70	30	650
Municipality of North Middlesex	2021 to 2046	700	100	50	850
Municipality of North Middlesex	2021 to 2051	840	140	60	1,040
Municipality of North Middlesex	2021 to 2056	970	180	70	1,220

[1] Includes single and semi-detached units. [2] Includes townhouses and apartments in duplexes. [3] Includes stacked townhomes and all other apartments.

Note: Figures have been rounded and may not add precisely (rounding inconsistencies, such as the 2021–2026 row, are reproduced from the source report).

Source: Watson & Associates Economists Ltd.

All content in this document is compiled and paraphrased from, or reproduced from, the following two reports prepared by Watson & Associates Economists Ltd. for Middlesex County:

- Middlesex County Growth Analysis — Final Report, dated April 25, 2025 (referred to in this document as Middlesex County Growth Analysis).
- Supporting analysis undertaken in Spring 2025 by Watson & Associates Economists.