



The Corporation of the Town of Milton

Report To: Council

From: Jill Hogan, Commissioner, Development Services

Date: December 8, 2025

Report No: DS-068-25

Subject: Town-Wide Retail Commercial Needs Analysis

Recommendation: THAT Council endorse the findings of the Town-Wide Retail Commercial Needs Analysis attached as Appendix 1;
AND THAT Council direct Staff to incorporate the findings and directions of the Town-Wide Retail Commercial Needs Analysis into the Town's new Official Plan.

EXECUTIVE SUMMARY

- The Town retained Tate Research to undertake a Town-Wide Retail Commercial Needs Analysis to understand the current and forecast retail commercial needs of the Town.
- The updated study has provided analysis and recommendations to inform Official Plan policy development.
- Staff has prepared draft policies to reflect the findings of the Town-Wide Commercial Needs Analysis and these policy updates are incorporated into the draft Official Plan attached to report DS-069-25.
- The key study findings include noting that Milton is currently underserved with retail commercial uses, and that planning policy should focus on retaining existing retail commercial space, protecting planned future retail commercial space and allowing for more flexible policy regarding new retail commercial development.

REPORT

Background

As the Town of Milton proceeds with the next phase of the new Official Plan, Staff need to ensure the Official Plan is providing for retail commercial uses to meet the forecasted commercial needs of the Town. To understand the overall town-wide retail commercial needs

Background

the Town retained Tate Research to complete a town-wide retail commercial needs study (the Study). The Study identifies and quantifies “unbuilt supply” and uses population forecasts and market demand analysis to identify demand and to project an overall need and distribution.

The last Town-Wide Commercial Needs Assessment was undertaken by Tate Research in 2014. Since that time, the Town’s population growth and its needs for retail commercial space outpaced the supply of new retail commercial development. The current study updates the 2014 work to inform policy development through the next phase of the new Official Plan preparation.

The retail industry is rapidly changing and evolving, leading to changes in the land requirements and built forms for retailers. The influence of e-commerce, drones, autonomous vehicles, artificial intelligence and virtual reality will ultimately influence land use planning decisions. However, despite these advancements in technology, there continues to be a critical role played by physical retail stores and retail commercial space to meet the needs of consumers.

Milton has conducted town-wide retail commercial needs studies dating back to 1998. The previous consultant for the Town, W. Scott Morgan & Associates conducted retail studies in 1998, 2002, 2005 and 2011. Tate Research also conducted a town-wide retail study in 2013. The Town-Wide Retail Commercial Needs Analysis attached as Appendix 1 updates these studies.

Discussion

Methodology

The Study approached the analysis with the following steps and methodology:

- Review of planning documents and previous research
- Review of retail trends in the Milton context
- Taking inventory of Retail Commercial Space
- Consumer research
- Consultation Interviews
- Market demand analysis

Discussion

Key Findings

Overall, the Study found that Milton is underserved with respect to retail commercial space. The current condition is likely the result of a mix of planning and market factors which have limited commercial development on the scale required. Milton not having enough retail commercial space could result in negative impacts such as an increase in traffic, decrease in quality of shopping experience, reluctance of existing retail expansions, lost employment opportunities and a reduction in commercial tax revenues. To address this deficit, it has been recommended that Milton update its planning policy framework to be more permissive. Planning for retail commercial space in various formats and locations to cater to a wide range of businesses and consumer needs is required.

Further it was noted that, given the forecast demand for ground-oriented development in the urban expansion areas, intensification through redevelopment of existing retail commercial areas may not materialize in the short to medium term. However, unless protected by planning policies, the existing retail commercial function in some key commercial areas may be gradually eroded through redevelopment.

Recommended Policy Considerations

The recommended policy directions included in the Study, to be considered in the new Official Plan, are:

- **Protect existing retail and commercial space:**
 - Ensure that redevelopment of existing retail sites protects the retail commercial function of the area
 - Ensure that development on sites within a Strategic Growth Area contributes to the retail commercial function of the area.

- **Encourage future retail space**
 - Provide for a possible reduction, reallocation or shared use of required parking
 - Allow for additional height and density commensurate with required retail commercial space
 - Recognize the benefits of ground floor retail, specifically supporting the local (neighbourhood and community) economy in terms of small and local enterprises

Discussion

- Recognize the benefits of a range of retail commercial space formats that will support local entrepreneurship, and that are reflective of diverse consumer desires and needs.
 - Encourage non-traditional retail commercial such as pop-up markets, micro-enterprise space and mobile retail.
 - Set minimum commercial floorspace requirements for inclusion in specific land use designations with the goal of ensuring that development land values do not escalate to the exclusion of retail commercial development
 - Allow stand-alone retail commercial development to proceed as the first phase in mixed-use designations with residential intensification to follow in later phases
- **Identify types and formats of stores that should be accommodated**
 - Encourage master planned mixed-use communities typically found within Strategic Growth Areas with between 5,000 to 8,000 persons (2,600 to 4,400 units assuming a ppu of 1.9) to provide for a small-scale food store. Larger communities and secondary plans with over 8,000 persons (2,500 units assuming a ppu of 3.2) should be planned to accommodate a supermarket.
 - Provide opportunities for a wide range of retail unit tenures and types to support retail entrepreneurs.
 - Acknowledge the social and economic benefits of a wide range of retail formats.
 - Encourage upper floor retail commercial space, which provides an alternative that can increase retail supply or provide uses such as small business office space, within developments that are in proximity to transit.
 - Enable non-traditional store fronts such as automated convenience stores, food and beverage, pharmacy and delivery lockers.

All of the suggested policy directions have been considered in drafting the new Official Plan, resulting in the policies being presented through DS-069-25 for consultation. Staff has worked to draft the policies for consultation to address the concerns raised in the Study regarding the undersupply of retail commercial space. These policy considerations have informed the draft policies to protect the retail commercial function of existing areas, provide for new retail commercial opportunities and to provide an implementation framework to expedite planning for future retail commercial development where appropriate.



Financial Impact

Financial impacts of proposed Official Plan policies will be addressed through the Official Plan specific Staff Reports, including DS-069-25.

Respectfully submitted,

Jill Hogan
Commissioner, Development Services

For questions, please contact: Megan Lovell, Senior Planner, Policy Phone: 905-878-7252 Ext. 2338

Attachments

Appendix 1 – Town-Wide Commercial Needs Assessment

Approved by CAO
Andrew M. Siltala
Chief Administrative Officer

Recognition of Traditional Lands

The Town of Milton resides on the Treaty Lands and Territory of the Mississaugas of the Credit First Nation. We also recognize the traditional territory of the Huron-Wendat and Haudenosaunee people. The Town of Milton shares this land and the responsibility for the water, food and resources. We stand as allies with the First Nations as stewards of these lands.

Town-Wide Retail Commercial Needs Analysis

Town of Milton

November 2025

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1 Introduction

Tate Research (“TR”) has been retained by the Town of Milton (“Town” or “Milton”) to conduct a Town-Wide Retail Commercial Needs Study (“Study”).

1.1 Study Context and Background

The Town-Wide Retail Commercial Needs Study provides a comprehensive analysis of Milton’s retail commercial land use structure for the purpose of establishing Milton’s forecast retail space requirements, the distribution of such space and other matters related to the retail sector, including hierarchy, evolving formats and design. This study provides long term guidance and includes flexible recommendations to recognize the on-going changes in the retail industry. Ultimately, this study will guide the Town’s growth and development along with various other growth related studies undertaken by the Town.

This Town-Wide Retail Commercial Needs Study is especially timely, given the state of the retail development industry in Canada, the GTA and in Milton in particular. There are many critical change elements influencing retail planning in Milton. Milton is forecast to experience significant population growth, which will result in considerable new demand for retail goods and correspondingly, retail locations. One of the challenges will be to determine the most effective distribution network for retailing in light of the changing market conditions in Milton.

1.2 Methodology

The retail industry is undergoing significant change. Technological advancements are leading to changes in the land requirements and built forms for retailers. The influence of e-commerce, drones, autonomous vehicles, artificial intelligence and virtual reality will ultimately influence land use planning decisions. However, despite these advancements in technology, there continues to be a critical role played by physical retail stores.

Milton has conducted town-wide retail commercial needs studies dating back to 1998. The previous consultant for the Town, W. Scott Morgan & Associates conducted retail studies in 1998, 2002, 2005 and 2011. TR also conducted a town-wide retail study in 2013.

The recommendations of previous studies tended to be prescriptive in terms of future square feet requirements by retail category and land requirements. While this study utilizes similar expenditure based analysis to quantify future demand, the resulting recommendations and policies are more nuanced to account for the changes in the retail industry as well as the unpredictability of commercial store formats and corporate real estate decisions.

The following study approach has been implemented for this study:

Review of Planning Documents and Previous Research

- A number of retail demand studies have been undertaken for development applications and secondary plans in the Town. TR has reviewed the relevant studies where applicable.

Review of Retail Trends in the Milton Context

- TR examined retail trends that are influencing shopping behavior and the resulting impacts on physical retail space planning. This trend review includes commentary relating to shopping centre formats, the evolution of “big box” retailing, the adaptation of retail formats to urban locations, the Internet’s influence on physical space requirements and other factors.

Inventory of Retail Commercial Space

- In order to gain a holistic and detailed understanding of the retail commercial environment in Milton, TR conducted an inventory of all retail commercial and vacant commercial space in the Town.
- This inventory included the name, address, size, and type of every retail commercial business in the Town. This assessment provided insight into existing retail commercial service levels in Milton, including data incorporated into the market demand analysis.

Consumer Research

- TR utilized mobility data to determine the extent of the customer draw at various retail locations around the Town. This information was incorporated into an estimate of ‘inflow’ of non-local expenditures that could be captured at retail commercial space in Milton.

Consultation Interviews

- TR considered input from development and retail industry representatives that are active in Milton. The intent was to understand the opportunities and challenges associated with the delivery of commercial space in the Town.

Market Demand Analysis

- TR conducted an expenditure-based analysis for the Food & Beverage Retail (“FBR”) and the Non-Food & Beverage Retail (“NFBR”) categories of retail space. TR also conducted a per capita analysis for the service-oriented space in Milton.
- The extent and timing of future population levels factored into these analyses.
- The analyses considered the impact of e-commerce on the future provision of ground oriented (i.e. brick and mortar) commercial space.
- For the expenditure-based analysis, TR quantified the total amount of retail commercial space that could be supported by existing and future residents of Milton. Although TR analysed major store categories, the resulting recommendations were based on the total quantum of commercial space. TR provided qualitative commentary on the major anchor requirements.
- For the per capita methodology, TR forecast demand using existing per capita space ratios for the Milton community, as well as industry standard per capita space requirements.
- The analyses resulted in overall market demand for additional retail commercial space in Milton. In order to assist with the allocation of retail commercial space across the Town, TR also assessed demand on a sub-area basis consisting of Planning Districts and Planning Policy Areas.

1.3 Defined Areas

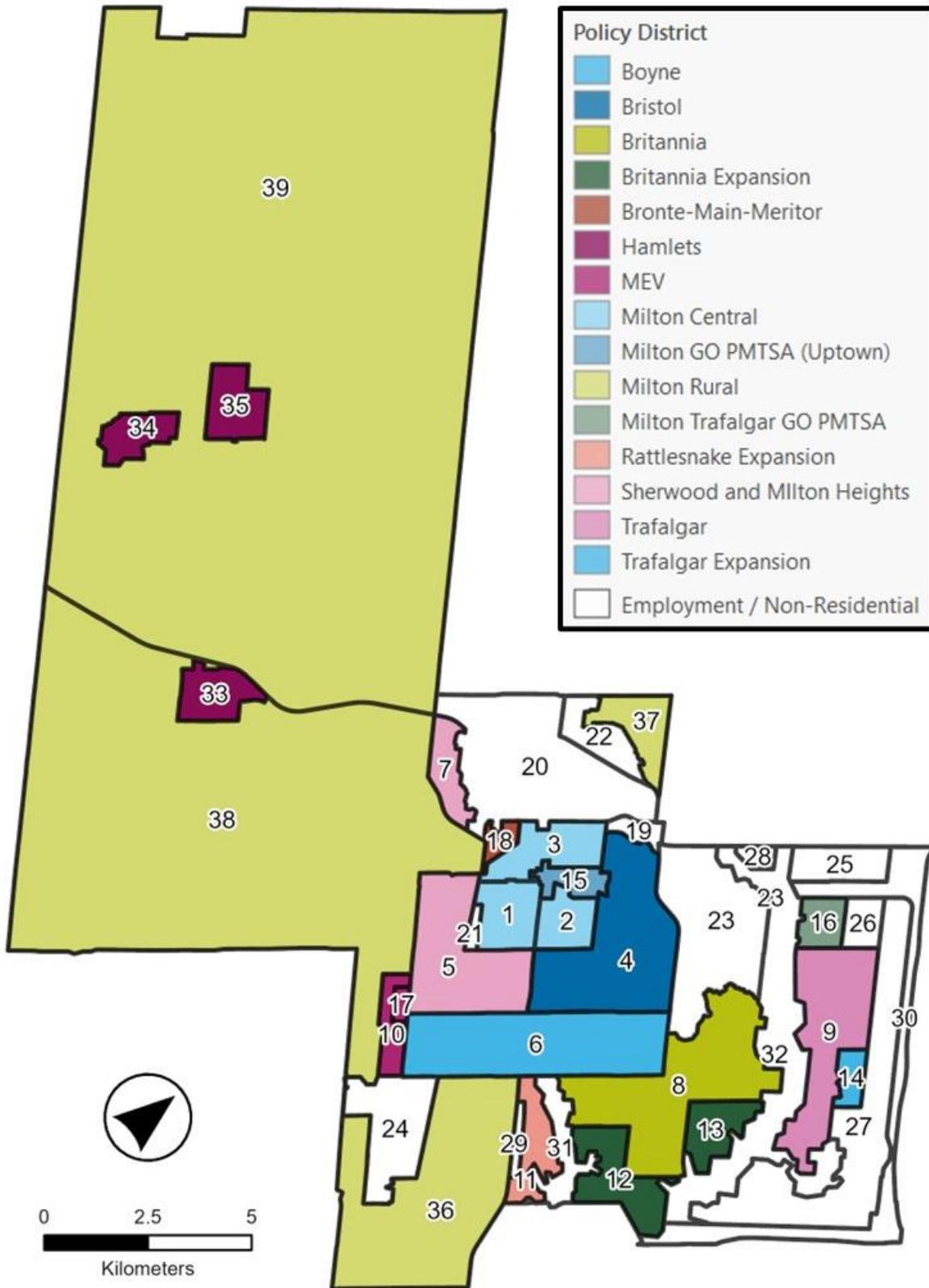
The TR analysis is based on Milton Planning Policy Areas (PPAs) and Planning Districts (PDs) as illustrated in Figure 1-1 and Figure 1-2. Figure 1-1 summarizes the PPAs which have retail commercial space and were inventoried. The balance of the PPAs did not include any retail commercial space. Figure 1-1 also identifies the PPAs / PDs that were analysed in terms of the demand analysis.

Figure 1-1: List of Study Areas

PPA ID	Planning Policy Area (PPA)	Planning District (PD)	Growth Phase	Inventory	Demand Analysis
M-01	Old Milton West	Milton Central	Existing Complete Neighbourhoods	x	
M-02	Old Milton East	Milton Central	Existing Complete Neighbourhoods	x	x
M-03	Old Milton North	Milton Central	Existing Complete Neighbourhoods	x	
M-15	Milton GO PMTSA (Uptown)	Milton Central	Existing Complete Neighbourhoods	x	x
M-18	Bronte-Main-Meritor	Milton Central	Existing Complete Neighbourhoods	x	x
M-04	Bristol	Bristol	Existing Complete Neighbourhoods	x	x
M-05	Sherwood	Sherwood & Milton Heights	Existing Complete Neighbourhoods	x	
M-07	Milton Heights	Sherwood & Milton Heights	Existing Complete Neighbourhoods	x	x
M-06	Boyne	Boyne	Existing Complete Neighbourhoods	x	x
M-08	Britannia	Britannia	New Complete Neighbourhoods	x	x
M-09	Trafalgar	Trafalgar	New Complete Neighbourhoods		x
M-10	Milton Education Village	MEV	New Complete Neighbourhoods		
M-17	MEV Innovation District	MEV	New Complete Neighbourhoods		x
M-11	Rattlesnake Expansion	Rattlesnake Expansion	New Complete Neighbourhoods		x
M-12	Britannia Expansion (W)	Britannia Expansion	New Complete Neighbourhoods		
M-13	Britannia Expansion (E)	Britannia Expansion	New Complete Neighbourhoods		x
M-14	Trafalgar Expansion	Trafalgar Expansion	New Complete Neighbourhoods		x
M-16	Milton Trafalgar GO PMTSA	Agerton/Trafalgar GO	New Complete Neighbourhoods		x
M-19	Steeles-Maple Commercial	Other	Commercial Area	x	
M-20	401 Employment	Other	Existing Employment Areas	x	x
M-21	Bronte Triangle Employment	Other	Existing Employment Areas	x	x
M-22	North Porta Employment	Other	Existing Employment Areas		
M-23	Derry Green Employment	Other	Existing Employment Areas	x	
M-24	Milton Southwest Employment	Other	New Employment Areas		
M-25	Agerton Employment Area (N)	Other	New Employment Areas	x	x
M-26	Agerton Employment Area (S)	Other	New Employment Areas		
M-27	Milton 407 Expansion Employment	Other	Future Employment Areas	x	
M-28	Sixth Line Expansion Employment	Other	Future Employment Areas		
M-29	Rattlesnake Expansion Employment	Other	Future Employment Areas		
M-33	Campbellville	Hamlets	Hamlet Area	x	
M-34	Moffat	Hamlets	Hamlet Area	x	x
M-35	Brookville	Hamlets	Hamlet Area	x	
M-36	Milton Rural South	Rural	Rural Area		
M-37	Milton Rural East	Rural	Rural Area		
M-38	Milton Rural West	Rural	Rural Area	x	x
M-39	Milton Rural North	Rural	Rural Area	x	
M-30	Utility Corridor	Other	Non-Developable Area		
M-31	Greenbelt (Urban - Sixteen W)	Other	Greenbelt		
M-32	Greenbelt (Urban - Sixteen E)	Other	Greenbelt	x	

Source: Tate Research

Figure 1-2: Map of Study Areas



Source: Tate Research

1.4 Assumptions

TR understands the challenges associated with making forecasts and recognizes that deviations from historic patterns are likely to occur. Nonetheless, it is our opinion that basic assumptions are necessary to conduct commercial/retail demand studies such as this one in Milton. These basic assumptions are outlined below.

- The development and corresponding population forecasts are presumed to be accurate. If these forecasts prove to diverge significantly from the population levels realized, the conclusions of this analysis may require revision.
- The development application, intensification opportunities, and undeveloped commercial land data provided by the Town are considered to be accurate and current. If any changes to this data occur, the conclusions of this analysis may require revision.
- The analysis and its conclusions should be reviewed considering these basic assumptions.

2 Current and Future Influences

This section of the report contains an overview of potential change agents which are relevant to the retail commercial marketplace within the Town. The identification of these change agents / trends, in addition to their implications on future requirements for retail commercial space, is critical in forming recommendations for the future of retailing in Milton.

In this study, a “change agent” can generally be defined as a new or emerging theme (e.g., changing demographics, new technologies, emerging trends) that may have implications for the future of land use planning in Milton.

2.1 Customer Preferences and Retailer Responses

When it comes to the retail market, the only true constant is change. From a demand perspective, technological advancements in e-commerce and multi-channel retailing are providing consumers with new non-traditional retail shopping options and product knowledge. In addition, changing socio-economic conditions, diversifying lifestyle patterns and evolving population and household demographics are just some of the many factors that are influencing Canadian retailing. It is important to recognize the need for an adaptable approach in order to respond to these constant market changes.

2.1.1 E-Commerce and Omni-Channel Retail

- **E-commerce Growth:** The rise of online shopping has significantly impacted physical retail stores. In a general sense, consumers are still spending the same amount on merchandise, however, the way they make those expenditures has changed from “brick & mortar” stores (traditional retail) to online. E-commerce has meant that many non-discretionary transactions and some discretionary items are being



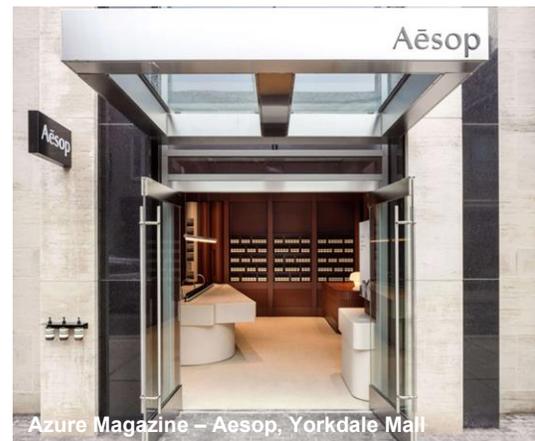
ordered online. The result is the replacement / reduction of physical store space and the rationalizing of store networks leading to reduced foot traffic in retail centres and on main streets.

- **Omni-channel Strategies:** To compete, many brick & mortar retailers are adopting omni-channel strategies, integrating their physical stores with their online presence. This includes offering services like "buy online, pick up in-store" (BOPIS), curbside pickup, and easy returns in-store for online purchases.
- For some stores, e-commerce has strengthened their physical presence as they are able to reach a wider audience while having a store front which is critical for customers to experience their brand in a physical setting. Their market reach has also been assisted by social media platforms which are more cost effective than traditional advertising media.

Implication: *The net result of e-commerce and the diverging retail market is that the amount of ground-oriented retail space required per person is decreasing. In a growing market this does not mean an overall reduction in retail space but instead a lesser requirement per capita for retail space, as population growth can offset the lower per capita requirements.*

2.1.2 Experiential Retail

- **Focus on Experience:** To attract customers, retail stores are increasingly focusing on providing unique in-store experiences that cannot be replicated online. This includes interactive displays, in-store events, personalized services, and experiential concepts like cafes or pop-up shops within stores.
- **Community Engagement:** Retailers are also engaging with local communities by hosting events, workshops, and collaborations with local artists or brands, creating a more personalized and memorable shopping experience.
- On a more localized level, there is a growing resurgence of local, independent retail and services characterized by craft / maker markets,



maker spaces, boutiques and specialty food purveyors. These types of stores understand and capitalize on the power of experience and local presence.

Implication: A broad array of designations permitting retail in various formats and locations to cater to a wide range of retailers is required. In addition, alternative forms of retail (i.e. pop-ups) may require a more permissive policy environment.

2.1.3 Demographic Shifts

Changing demographics, including the growth of younger, more urban populations, are influencing retail trends. These consumers often prefer unique, independent stores over traditional chain stores, driving a shift towards more niche and personalized retail offerings.

- **Millennials and Gen Z:** These are younger generations (with Millennials born from 1981 to 1996 and Gen Z from 1997 to 2012) prioritize experience over products, value sustainability, and are tech-savvy. They often prefer unique, local, or independent stores that offer personalized experiences. This shift has led to a rise in experiential retail, where shops offer more than just products; they create engaging experiences, such as in-store events, interactive displays, and social media-friendly settings.
- **Digital Natives:** Gen Z and younger millennials have grown up with technology and expect a seamless integration between online and offline shopping experiences. Retailers are responding by adopting multi-channel strategies, offering services like mobile payments, online ordering with in-store pickup, and integrating technology such as augmented reality (AR) for virtual try-ons.
- **Cultural Diversity:** As urban areas become more diverse, there is a growing demand for products that reflect a wider range of cultural backgrounds. Retailers are responding by stocking a broader range of culturally specific goods, from food items to clothing and beauty products. This trend has also led to the emergence of specialty stores that



cater specifically to particular ethnic or cultural groups.

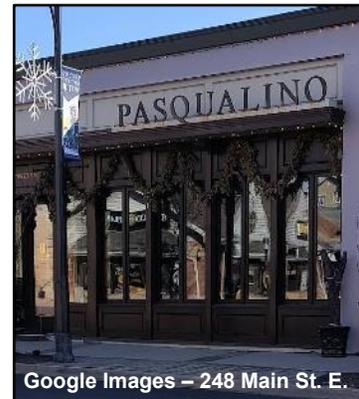
- **Inclusive Marketing:** With more diverse demographics, retailers are increasingly adopting inclusive marketing strategies that resonate with various cultural identities and lifestyles. This includes everything from diverse representation in advertising to offering products that cater to different cultural norms and preferences.

Implication: A broad array of designations permitting retail in various formats and locations to cater to a wide range of retailers is required.

2.1.4 Tenant Mix Trends

The tenant mix, whether in shopping malls, main streets or strip plazas is constantly evolving. In the points that follow, TR has provided our assessment of the changes currently being experienced within retail nodes.

- **Diverse Dining Options:** Food and beverage outlets, including cafes, casual dining, and fine dining restaurants, have become anchor tenants on main streets and are important components of retail centres. The demand for unique culinary experiences and the growing trend of social dining have driven an increase in both traditional restaurants and innovative food concepts like food halls and pop-up eateries.
- **Specialty Food Shops:** There is also growth in specialty food retailers, such as gourmet grocers, bakeries, and delicatessens, especially those that focus on locally sourced or artisanal products. These shops cater to the increasing consumer preference for quality, locally produced goods.
- **Convenience and Necessity Retailers:** Convenience stores, pharmacies, and other necessity-based retailers remain important tenants, as they provide essential goods and services. The demand for convenience has increased, particularly in urban areas where residents prefer to shop locally for everyday needs.



- **Fitness and Wellness Centres:** With increasing awareness of health and wellness, there is a growing number of gyms, yoga studios, pilates centres, and wellness clinics (like acupuncture and massage therapy) on main streets. These businesses provide services that are not easily replaced by e-commerce, making them resilient tenants.
- **Health-Oriented Stores:** Retailers specializing in health foods, organic products, supplements, and wellness-related goods are becoming more prominent, catering to the growing consumer interest in health and well-being.
- **Personal Services:** There is growth in businesses offering personal services, such as hair salons, nail salons, dry cleaners, and tailor shops, which cater to daily needs and are less affected by the shift to online shopping.
- **Entertainment & Recreation:** In keeping with the experiential retail trends, entertainment & recreation concepts such as VR, bowling alleys, mini-golf, arcades, game cafes, escape rooms and interactive museums and exhibits are locating on many mains streets. Many of the larger concepts are found in retail centres and mixed-use developments which have the size and building configuration suitable for such uses.



Implication: A broad array of designations permitting retail in various formats and locations to cater to a wide range of retailers is required.

Many of the tenant mix trends focus on local goods and services, therefore, complete communities and prioritized access to daily and weekly goods and services should be encouraged.

2.2 Traditional Commercial Development

Traditional commercial development, i.e. single story retail with surface parking, represents and will continue to represent the majority of retail commercial development outside of Milton Uptown, Bronte-Main-Meritor, MEV Innovation District and Agerton MTSA for the short to medium term. There are several trends influencing the development of this format.

The Retailer Perspective

- Range of Supermarket Anchor Sizes: Supermarket anchored centres are typically considered the ‘building blocks’ of neighbourhood development. The supermarket industry is generally experiencing consolidation and a trend of developing smaller prototypes. This has been taken to the extreme by No Frills which has recently opened stores in the 10,000 square foot range in both urban and suburban locations. Supermarkets in the range of 30,000 to 40,000 square feet also remain preferred new store sizes, depending on market conditions and site-specific factors. However, in Ontario there has been no development of the 100,000 square foot “superstore” concept for many years.



Tate Research – 1050 Kennedy Cir.

- Range of Grocery Types: The supermarket industry in Canada is very concentrated with a small number of corporations controlling a larger number of banners. This results in market share dynamics which in some



Tate Research - 575 Ontario St. S.

instances lead to under served communities. These corporations are also purchasing ethnic oriented chains such as Loblaws purchase of T&T and Metros purchase of Adonis. However, below this national tier there is a thriving industry of local chains that are able to fill in the market gaps,

especially within the ethnic market.

- Resistance to Mixed-Use: With very few exceptions, none the main general merchandise anchors (such as Canadian Tire, Home Depot,

Costco, etc.) are considering mixed-use developments. While supermarkets have shown a willingness to locate in mixed-use developments, they have a strong preference to locate within traditional centres.

The Developer Perspective

- **Grocery Anchored Retail:** Within the commercial hierarchy, grocery anchored commercial developments are the most sought-after investments and therefore are the most likely to be developed.
- **Land Designations are Impacting Costs:** Developers want to build supermarket anchored traditional developments. However, the move towards mixed-use land designations, versus commercial only designations, has resulted in high land costs reflecting mixed-use developments versus traditional commercial. This higher land cost contributes to the challenge of developing traditional retail centres.

The Consumer Perspective

- **Ease of Access is a Priority:** Consumers overwhelmingly prefer traditional retail commercial developments that offer single level stores and at-grade parking located close to the store entrance. This preference is particularly noted for supermarket shopping.

Implication: The majority of development in Milton is forecast to occur in low and medium density developments. The implication is that traditional commercial development will continue to be the preferred form of development for retailers, developers and consumers.

Traditional grocery anchored neighbourhood centres required 10 - 15 acres of land. Industry trends indicate that this land requirement could potentially be reduced and the centre could still achieve the same planned function.

Mixed-use buildings, while furthering planning goals and principles, are challenging from a retail commercial perspective. Mixed-use designations may also result in retail commercial space being squeezed out in favour of higher value land uses.

2.3 Mixed-Use Developments

Mixed-use development in Milton is in its infancy. However, going forward as the economic and market forces align, we anticipate an acceleration of mixed-use development which will require policy adjustments to ensure the commercial environment remains viable and does not get eroded.



Mixed-use developments are at the forefront of urban development. At its most basic description, mixed-use developments comprise different land uses within a vertical or horizontal plan. As an example, a vertical mixed-use building could include retail on the ground level and office, hotel or residential uses in the floors above. Vertical mixed-use is primarily located in urban centres and around transit nodes. Horizontal mixed-use could include different single-use buildings within the same property or node.

This section of the report examines the main challenges for mixed-use development from the retail commercial perspective.

2.3.1 Not All Mixed-Use Sites are Appropriate for Retail

Mixed-use developments generally occur in a range of different geographic contexts each with varying retail prospects:

- **Single or Limited Building Infill Sites** – Many mixed-use buildings are single building infill developments located along commercial main streets and arterials. In these instances, retail on the ground floor is often required by the municipal authority and is desired to maintain the commercial primacy of the street level as well as support other factors such as sidewalk animation. In many of these scenarios, pedestrian traffic levels are appropriate to advance ground floor commercial.

- **Multi-Building Master Planned Infill / Redevelopment** – These larger mixed-use master planned developments (i.e. 10+ buildings) in urban areas are often the redevelopment of assembled brownfield and greenfield sites. Ground floor retail commercial space is typically required since providing ground floor residential facing onto higher traffic streets is not ideal.

These projects typically include internal streets to create permeability with the surrounding urban fabric. In these instances, one of the goals of the retail commercial component is to create a continuation of commercial uses on streets through the development, as well as create ground floor animation.

The retail in these developments typically is primarily intended to serve the residents of the master plan, which can be as high as 10,000 persons or more. However, the viability of retail space is dependent upon sufficient pass-through traffic and the basic requirements for successful retail commercial operations such as visibility and accessible surface parking.

- **Greenfield Single / Multiple Building Development** – Mixed-use buildings are also developed in greenfield community areas, often to ensure population and employment density targets are achieved. However, until such time as the new surrounding residential neighbourhood has built out, there may not be sufficient demand present to support walkable mixed-use retail environments.

This section has dealt with vertical mixed-use developments. Horizontal mixed-use developments (i.e. different uses on a property that are not vertically integrated) are typically found in areas where developable land may be more readily available but with the same intent of creating complete communities.

In Milton, speculative land assembly reflects residential development land values, which are greater than land values associated with single (or 2 storey) retail developments resulting in challenging economics for commercial development.

Single purpose or horizontal mixed-use developments may be considered as interim uses, with intensification opportunities to add residential infill components to larger land parcels that currently operate as single purpose retail commercial centres.

The Retailer Perspective

Retailers typically prefer standardized formats and modules. From a retailer perspective, there are several challenges associated with vertical mixed-use formats. These challenges include potential second floor locations, multi-floor retail units, parking and loading restrictions as well as accessibility considerations. Building design and operational issues, such as loading, storage and garbage disposal, are often challenging for retailers in mixed-use developments. Drive-thru permissions and the provision of 'click and' services are increasingly important to certain retailers and other uses such as restaurants. These services are often difficult or not possible to provide in mixed-use developments. Generally, Canadian retailers have yet to fully embrace mixed-use developments.

Retail units in mixed-use buildings typically require the same attributes as typical retail whether it be on main street, strip plazas, power centres or shopping centres. Pedestrian traffic, known as footfall density, and/or vehicular traffic is critical. This traffic is primarily generated by the surrounding residential density and the daytime population.



Google Images

The Developer Perspective

In most mixed-use developments, the retail commercial component is a small portion of the overall project in terms of scale and financial implications, both from a cost and revenue perspective. Retail commercial components may conflict with enjoyment of residential units by adding noise, traffic, nuisances, parking congestion, and other factors.

It is also noted that the cost to build retail commercial space in mixed-use environments can be considered uneconomic, in that the space costs more to build than the developer can charge in the marketplace. In the GTA context, it is noted that residential uses typically command higher rents than commercial uses. These factors may lead to a diminished desire for developers to create ground floor commercial space.

On the other hand, retail commercial uses in mixed-use developments provide service to the residents in and near the building and from the developer's perspective, can make residential units more attractive to lease / sell. Developers and planners are rightfully concerned about the creation of unsuccessful retail commercial units that are difficult to lease, remain vacant for long periods of time, or result in uneconomic rents and / or undesirable tenancies.

To summarize, while there are many positive impacts of retail commercial development in mixed-use buildings, there are potential downsides to retail commercial development, if it is not implemented correctly. This risk is particularly relevant given that retail commercial development is not considered appropriate in all locations. To mitigate this risk, many jurisdictions are being more prescriptive on where retail should be required both geographically but also specifically within buildings (i.e. only on arterial frontages).

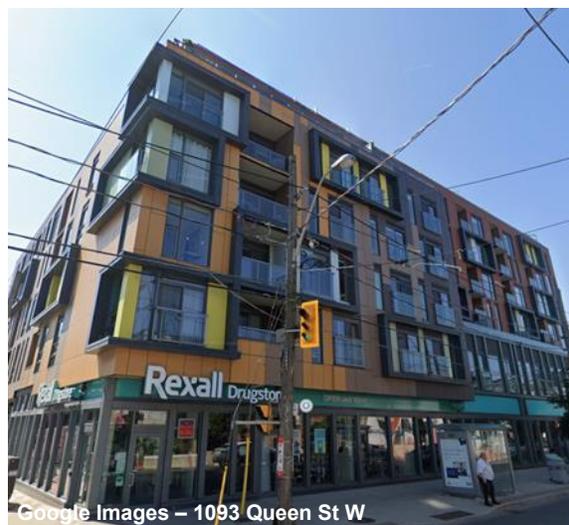
To summarize, while there are many positive impacts of retail commercial development in mixed-use buildings, there are potential downsides to retail commercial development, if it is not implemented correctly. This risk is particularly relevant given that retail commercial development is not considered appropriate in all locations. To mitigate this risk, many jurisdictions are being more prescriptive on where retail should be required both geographically but also specifically within buildings (i.e. only on arterial frontages).

The Consumer / Tenant Perspective

The consumer / tenant perspective in mixed use development is varied and is influenced by the market positioning of the development and the surrounding commercial environment. While the idyllic concept is for residents of a mixed-use building to be able to go downstairs to get a coffee, buy groceries or meet friends in a restaurant, the reality of conflicting uses is heightened within these types of environments. There are challenges around noise, access and smells associated with many ground floor uses, particularly in the food and beverage sectors.



From the consumer perspective, retail commercial uses in mixed-use developments need to present a frictionless experience with respect to shopping carts and vehicle loading as well as pedestrian access. Retailers have spent millions of dollars and hundreds of hours researching the ideal in-store format, whether it be aisle width, lighting, merchandising, length of the check-out, etc. However, within mixed-use developments, there is the additional issue of how to get consumers into the building either through parking garages or, if on upper levels, via escalators / elevators / stairs. The level of research is being refined and as more mixed-use developments occur, consumers will become more accustomed to shopping within these types of formats.



Implication: *When requiring mixed-use development with ground (or second / third floor) commercial, the location of these developments takes on an added importance. Successful ground floor retail commercial space results in several economic, community and health benefits. However, the opposite is also true, where unsuccessful retail commercial space could result in negative implications. Furthermore, the interaction between the consumer and retailer cannot be taken for granted and additional considerations is required with respect to design and access.*

2.3.2 Providing Flexibility to Accommodate Trends and Alternative Ground Floor Activation

The challenges with retail commercial in mixed-use developments are often further compounded by the constantly changing retail environment. Some of these factors are outlined below.

Tenancing Factors

In major urban centres, there will be instances where demand, in terms of population levels and retail expenditure potential may be present, but appropriate tenants are not available or cannot be accommodated in the proposed mixed-use development. Simply put, there are not enough national chain drug stores, liquor stores and banks to tenant all of the proposed mixed-use developments. Landlords of the ground floor commercial components are required to consider

independent and smaller “mom and pop” tenants for their commercial spaces. This, in turn, impacts the rents that can be realised which must be reflected in the development proforma.

Independent tenants typically do not have the financial means or timing to allow for lengthy buildouts and large capital expenditures for internal design. Another aspect of the move towards more independent tenants is that lease terms are becoming shorter as retailers and developers are recognizing the rapidly evolving market. Shorter lease terms mean that there is less incentive for landlords to provide comprehensive tenant improvements. This means that when designing retail space in new mixed-use developments, consideration should be given to ensuring that the space is as flexible as possible to accommodate a wide array of retailers and allow for transition of uses with minimal capital expenditures.

Interim Uses

It is our experience that the amount of retail space supported by the on-site residents of a mixed-use development is typically overstated. Furthermore, demand generated solely by proximity to transit is also typically overstated. The market support for the commercial space must extend well beyond the immediately adjacent demand generators.

If market demand to support traditional types of retail is not present, which is the case in many non-main street infill mixed-use developments, consideration should be given to interim uses that allow for transition to retail uses when demand materializes.

The genesis of the saying “retail follows the rooftops” is from traditional suburban green field development. In these developments, the last portion of a typical subdivision to be developed is the neighbourhood retail plaza, which occurs when the housing is completed and the market demand for the retail space exists.

In multi-building mixed-use developments, the retail commercial space is often required in the initial phases of development. As such, demand lags behind the offering of ground floor retail space. Often interim uses that can be converted to commercial when demand materializes may be appropriate.



Therefore, in the interim, there needs to be innovative thinking of how to tenant the ground floor and provide animation while recognizing that demand for retail space may not be fully present. Options for the ground floor could include, but are not limited to, the following:

- **Online Pop-Up** – Pop-ups are short term, low budget uses that can provide space for online retailers, typically independent artisans, who are looking to establish a brick & mortar presence. Most successful online retailers will eventually want a physical store front. Many of these retailers already have a loyal following and therefore do not want or need to lease high rent space on high profile main streets. These uses can be broader than typical retail and have been very successful with artisanal food.



- **Incubator** – Similar to the pop-up, this space would be occupied on a short-term basis by budding entrepreneurs looking to test concepts. A contest could be held by the developer or the Town with the hope that one of the concepts converts to a permanent tenant.
- **Non-Retail Store Fronts / Interactive Art Installations** – At a minimum, store frontages / windows should not be left vacant with only “for lease” signs. Local art could be displayed in the windows while waiting to lease.
- **Community** – There are several community uses such as non-profit spaces, community centres, temporary public engagement spaces etc., that could help further activate ground floor space in the interim while also providing a community benefit.
- **Live Work Option** – There are live work options which start off as residential and then can convert to a range of retail commercial uses including uses such as maker spaces.
- **Office Uses** – There is the potential for boutique office space that can evolve to retail as market drives up rent.

While active commercial uses are the best way to promote ground floor activation, there are other options such as ground floor residential with patios or walk-up town homes to increase variety and influence the streetscape. These uses also provide animation and in many cases are preferred to “inactive” commercial uses.

Implication: *There are some locations which are presently viable for higher density residential development yet are still 10 to 15 years away from possessing the demand characteristics for viable retail.*

In the past, when a residential subdivision was being developed, the corner commercial site of 2 – 10 acres would be left vacant for years while the neighbourhood was built out. That option does not exist in mixed-use developments. This situation results in a challenge for the Town - should the development of ground floor retail be required knowing that it is not currently viable or should the opportunity for ground floor retail be forgone, perhaps for the life of the building.

The answer may lie in a comprehensive set of interim use precedents in terms of built form and design guidelines that allow for the transition to commercial when the market is sufficient to support the commercial component.

2.3.3 Maintaining the Retail Function

The majority of retail space in Milton is within traditional low-density formats with surface parking. The surface parking lots may represent residential development opportunities and, over time, the retail centres themselves will become targets of redevelopment for residential and mixed-use development.

The combination of accelerated population growth, housing market conditions and the presence of many commercial developments at major intersections will lead to an increasing amount of future redevelopment opportunity within Milton.

These new residents will require retail commercial space. A modern, livable community will require retail commercial space within walking distance of many residents. Given the economics that favour residential versus commercial, there is significant pressure to reduce the amount of commercial space in redevelopment scenarios. This pressure is also evident in greenfield areas, such as secondary plans, where there is pressure to redesignate commercial designations in favour of residential.

Implication: *Given the significant growth forecast in the expansion areas, we do not expect this redevelopment pressure to materialize in the short to medium term. However, unless protected by planning policies, the existing retail commercial function in some key commercial areas may be eroded through redevelopment.*

3 Retail Commercial Inventory Summary

The demand for retail commercial space within the Town will be influenced by the increase in the number of residents in Milton and the surrounding region, in addition to the current and proposed supply of retail commercial space. This section of the report examines the existing form and supply of retail commercial space within the Town.

3.1 Milton Retail Commercial Definitions

The inventory of retail commercial space is based on fieldwork carried out by TR in June 2025. For reference purposes, the term “retail commercial” refers to all retail, service and vacant space. The following retail and service categories fall under the term retail commercial:

Figure 3-1: Retail Commercial Definitions

Food & Beverage Retail (FBR)	Non-Food & Beverage Retail (NFBR)	
Supermarkets & Grocery Stores	Clothing, Shoes & Accessories	Building & Outdoor Home Supply
Convenience & Specialty Food Stores	Furniture, Home Furnishings & Electronics	Pharmacies & Personal Care
Beer, Wine & Liquor Stores	General Merchandise	Department Stores
	Miscellaneous Retail	Automotive
Service		
Food Services & Drinking Places	Financial, Insurance, Legal & Real Estate	Health Care & Social Assistance
Other Services	Entertainment & Recreation	Personal Care & Laundry

Source: Tate Research

For the purpose of this analysis, TR has examined the distribution of retail commercial space by Planning Policy Area (“PPA”) sub-totaled to Planning Districts (“PD”) where applicable. Figure 3-2 illustrates the areas which currently contain retail commercial space and were inventoried. The “ID” refers to Milton’s policy ID number.

Figure 3-3: Existing and New Complete Neighbourhood Inventory of Retail Commercial Space

PPA (Milton PPA ID)	Milton Central					Sub-total	Percent Distribution
	Old Milton West (1)	Old Milton East (2)	Old Milton North (3)	Milton GO PMTSA (Uptown) (15)	Bronte-Main-Meritor (18)		
Food & Beverage Retail (FBR)							
Supermarkets & Grocery Stores	0	44,500	0	135,600	0		
Convenience & Specialty Food Stores	15,800	2,200	18,900	40,000	0		
Beer, Wine & Liquor	0	0	13,900	13,100	0		
Food & Beverage Retail (FBR)	15,800	46,700	32,800	188,700	0		
Non-Food & Beverage Retail (NFBR)							
Department Stores	0	0	0	0	0		
General Merchandise	0	0	0	17,800	0		
Clothing, Shoes & Accessories	0	0	6,600	47,100	0		
Furniture, Home Furnishings & Electronics	4,100	2,400	14,800	30,900	0		
Pharmacies & Personal Care Stores	1,500	3,500	30,100	30,300	0		
Building & Outdoor Home Supplies	0	0	1,900	158,700	0		
Miscellaneous Retailers	8,000	7,100	19,600	60,600	0		
Automotive	0	0	0	22,200	0		
Subtotal Non-Food & Beverage Retail (NFBR)	13,600	13,000	73,000	367,600	0		
Service Space							
Food Services & Drinking Places	17,300	24,500	98,300	80,900	0		
Personal Care & Laundry Services	7,800	6,300	44,600	28,300	0		
Financial, Insurance, Legal & Real Estate Services	7,800	5,200	41,100	52,000	1,000		
Health Care & Social Assistance Services	22,000	23,100	83,400	112,000	1,000		
Entertainment & Recreation Services	10,000	4,400	18,300	138,800	0		
Other Services	17,000	5,700	27,400	58,400	0		
Subtotal Service Space	81,900	69,200	313,100	470,400	2,000		
Total Occupied Retail & Service Space	111,300	128,900	418,900	1,026,700	2,000		
Vacant	4,800	5,900	19,000	70,500	0		
Vacancy Rate (%)	4.1%	4.4%	4.3%	6.4%	0.0%		
Total Retail & Service Space	116,100	134,800	437,900	1,097,200	2,000		
Percent Distribution (Milton Wide)	2.7%	3.1%	10.1%	25.4%	0.0%		

PPA (Milton PPA ID)	Sherwood& Milton Heights					Sub-total	Percent Distribution
	Bristol (4)	Sherwood (5)	Milton Heights (7)	Boyne (6)	Trafalgar (9)		
Food & Beverage Retail (FBR)							
Supermarkets & Grocery Stores	53,800	89,100	0	47,400	0	370,400	15.5%
Convenience & Specialty Food Stores	9,700	3,000	0	0	0	89,600	3.7%
Beer, Wine & Liquor	0	12,100	0	0	0	39,100	1.6%
Food & Beverage Retail (FBR)	63,500	104,200	0	47,400	0	499,100	20.8%
Non-Food & Beverage Retail (NFBR)							
Department Stores	0	0	0	0	0	0	0.0%
General Merchandise	3,900	0	0	0	0	21,700	0.9%
Clothing, Shoes & Accessories	12,600	1,500	0	1,700	0	69,500	2.9%
Furniture, Home Furnishings & Electronics	2,600	0	0	0	0	54,800	2.3%
Pharmacies & Personal Care Stores	26,000	26,300	0	1,500	0	119,200	5.0%
Building & Outdoor Home Supplies	3,200	0	1,600	0	11,600	177,000	7.4%
Miscellaneous Retailers	9,900	3,000	0	0	0	108,200	4.5%
Automotive	0	0	0	0	0	22,200	0.9%
Subtotal Non-Food & Beverage Retail (NFBR)	58,200	30,800	1,600	3,200	11,600	572,600	23.9%
Service Space							
Food Services & Drinking Places	15,300	35,700	0	19,700	0	291,700	12.2%
Personal Care & Laundry Services	28,900	5,200	0	6,000	0	127,100	5.3%
Financial, Insurance, Legal & Real Estate Services	18,400	28,500	0	8,200	0	162,200	6.8%
Health Care & Social Assistance Services	38,000	29,600	0	10,700	0	319,800	13.4%
Entertainment & Recreation Services	3,600	0	0	0	0	175,100	7.3%
Other Services	20,500	2,100	0	1,100	500	132,700	5.5%
Subtotal Service Space	124,700	101,100	0	45,700	500	1,208,600	50.5%
Total Occupied Retail & Service Space	246,400	236,100	1,600	96,300	12,100	2,280,300	95.2%
Vacant	6,200	7,700	0	0	0	114,100	4.8%
Vacancy Rate (%)	2.5%	3.2%	0.0%	0.0%	0.0%	4.8%	
Total Retail & Service Space	252,600	243,800	1,600	96,300	12,100	2,394,400	100%
Percent Distribution (Milton Wide)	5.8%	5.6%	0.0%	2.2%	0.3%	55.3%	

Source: Tate Research, based on inventory and site inspections completed by TR in June 2025. Rounded to the nearest 100 square feet.

Figure 3-4: Employment, Commercial and Other Areas Inventory of Retail Commercial Space

PPA (Milton PPA ID)	Employment				
	401 Empl. (20)	Agerton Empl. (N) (25)	Bronte Triangle Empl. (21)	Derry Green Empl. (23)	Milton 407 Exp. Empl. (27)
Food & Beverage Retail (FBR)					
Supermarkets & Grocery Stores	0	0	0	0	0
Convenience & Specialty Food Stores	2,000	800	0	6,800	0
Beer, Wine & Liquor	0	0	0	0	0
Food & Beverage Retail (FBR)	2,000	800	0	6,800	0
Non-Food & Beverage Retail (NFBR)					
Department Stores	0	0	0	0	0
General Merchandise	0	0	0	0	0
Clothing, Shoes & Accessories	0	0	0	0	0
Furniture, Home Furnishings & Electronics	15,500	0	0	0	0
Pharmacies & Personal Care Stores	0	0	23,400	2,500	0
Building & Outdoor Home Supplies	67,500	0	20,300	4,700	0
Miscellaneous Retailers	10,800	0	7,300	2,500	0
Automotive	33,400	0	7,300	0	0
Subtotal Non-Food & Beverage Retail (NFBR)	127,200	0	58,300	9,700	0
Service Space					
Food Services & Drinking Places	64,800	9,600	20,000	23,200	0
Personal Care & Laundry Services	1,800	0	10,200	7,400	0
Financial, Insurance, Legal & Real Estate Services	7,800	0	27,300	4,500	0
Health Care & Social Assistance Services	13,600	0	90,200	4,700	5,900
Entertainment & Recreation Services	81,100	0	52,000	0	0
Other Services	152,000	0	60,200	11,300	0
Subtotal Service Space	321,100	9,600	259,900	51,100	5,900
Total Occupied Retail & Service Space	450,300	10,400	318,200	67,600	5,900
Vacant	64,500	0	25,500	0	0
Vacancy Rate (%)	12.5%	0.0%	7.4%	0.0%	0.0%
Total Retail & Service Space	514,800	10,400	343,700	67,600	5,900
Percent Distribution (Milton Wide)	11.9%	0.2%	7.9%	1.6%	0.1%

PPA (Milton PPA ID)	Steeles-Maple Commercial (19)	Greenbelt (Urban - Sixteen E) (32)	Sub-total	Percent Distribution
Food & Beverage Retail (FBR)				
Supermarkets & Grocery Stores	39,000	0	39,000	2.2%
Convenience & Specialty Food Stores	0	400	10,000	0.6%
Beer, Wine & Liquor	5,800	0	5,800	0.3%
Food & Beverage Retail (FBR)	44,800	400	54,800	3.0%
Non-Food & Beverage Retail (NFBR)				
Department Stores	134,200	0	134,200	7.5%
General Merchandise	115,100	0	115,100	6.4%
Clothing, Shoes & Accessories	52,600	0	52,600	2.9%
Furniture, Home Furnishings & Electronics	71,000	0	86,500	4.8%
Pharmacies & Personal Care Stores	19,700	0	45,600	2.5%
Building & Outdoor Home Supplies	82,400	9,100	184,000	10.2%
Miscellaneous Retailers	121,200	0	141,800	7.9%
Automotive	0	0	40,700	2.3%
Subtotal Non-Food & Beverage Retail (NFBR)	596,200	9,100	800,500	44.4%
Service Space				
Food Services & Drinking Places	57,400	0	175,000	9.7%
Personal Care & Laundry Services	13,200	0	32,600	1.8%
Financial, Insurance, Legal & Real Estate Services	26,800	0	66,400	3.7%
Health Care & Social Assistance Services	20,000	0	134,400	7.5%
Entertainment & Recreation Services	74,400	0	207,500	11.5%
Other Services	2,000	0	225,500	12.5%
Subtotal Service Space	193,800	0	841,400	46.7%
Total Occupied Retail & Service Space	834,800	9,500	1,696,700	94.2%
Vacant	14,500	0	104,500	5.8%
Vacancy Rate (%)	1.7%	0.0%	5.8%	
Total Retail & Service Space	849,300	9,500	1,801,200	100%
Percent Distribution (Milton Wide)	19.6%	0.2%	41.6%	

Source: Tate Research, Based on inventory and site inspections completed by TR in June 2025. Rounded to the nearest 100 square feet.

Figure 3-5: Milton Retail Commercial Space Summary – Hamlets and Rural Areas

PPA (Milton PPA ID)	Hamlets			Rural		Sub-total	Percent Distribution	Total Milton	Percent Distribution
	Campbellville (33)	Moffat (34)	Brookville (35)	Rural North (39)	Rural West (38)				
Food & Beverage Retail (FBR)									
Supermarkets & Grocery Stores	0	0	0	0	0	0	0.0%	409,400	9.5%
Convenience & Specialty Food Stores	6,500	0	3,500	1,600	5,300	16,900	12.8%	116,500	2.7%
Beer, Wine & Liquor	1,000	0	0	0	0	1,000	0.8%	45,900	1.1%
Food & Beverage Retail (FBR)	7,500	0	3,500	1,600	5,300	17,900	13.6%	571,800	13.2%
Non-Food & Beverage Retail (NFBR)									
Department Stores	0	0	0	0	0	0	0.0%	134,200	3.1%
General Merchandise	0	0	0	0	0	0	0.0%	136,800	3.2%
Clothing, Shoes & Accessories	0	0	0	3,300	0	3,300	2.5%	125,400	2.9%
Furniture, Home Furnishings & Electronics	4,800	0	0	0	0	4,800	3.6%	146,100	3.4%
Pharmacies & Personal Care Stores	2,200	0	0	0	0	2,200	1.7%	167,000	3.9%
Building & Outdoor Home Supplies	5,900	0	0	2,000	2,600	10,500	8.0%	371,500	8.6%
Miscellaneous Retailers	9,000	3,300	0	1,200	900	14,400	10.9%	264,400	6.1%
Automotive	0	0	0	0	0	0	0.0%	62,900	1.5%
Subtotal Non-Food & Beverage Retail (NFBR)	21,900	3,300	0	6,500	3,500	35,200	26.7%	1,408,300	32.5%
Service Space									
Food Services & Drinking Places	10,600	0	600	0	0	11,200	8.5%	477,900	11.0%
Personal Care & Laundry Services	3,500	0	0	0	0	3,500	2.7%	163,200	3.8%
Financial, Insurance, Legal & Real Estate Services	6,400	0	0	0	0	6,400	4.9%	235,000	5.4%
Health Care & Social Assistance Services	2,900	0	1,700	4,400	0	9,000	6.8%	463,200	10.7%
Entertainment & Recreation Services	1,100	0	0	0	0	1,100	0.8%	383,700	8.9%
Other Services	33,400	0	0	3,900	0	37,300	28.3%	395,500	9.1%
Subtotal Service Space	57,900	0	2,300	8,300	0	68,500	52.1%	2,118,500	49.0%
Total Occupied Retail & Service Space	87,300	3,300	5,800	16,400	8,800	121,600	92.4%	4,098,600	94.7%
Vacant	8,000	0	0	2,000	0	10,000	7.6%	228,600	5.3%
Vacancy Rate (%)	8.4%	0.0%	0.0%	10.9%	0.0%	7.6%			
Total Retail & Service Space	95,300	3,300	5,800	18,400	8,800	131,600	100%	4,327,200	100.0%
Percent Distribution (Milton Wide)	2.2%	0.1%	0.1%	0.4%	0.2%	3.0%		100.0%	

Source: Tate Research, based on inventory and site inspections completed by TR in June 2025. Rounded to the nearest 100 square feet.

- Various traditional neighbourhood commercial plazas distributed within the residential areas.

For summary purposes, the PPA and PDs were classified as follows and summarized in Figures 3-3 to 3-5.

- Existing and New Complete Neighbourhoods: 2,394,400 square feet or 55.3% of all retail commercial space Town-wide.
- Employment, Commercial and Other: 1,801,200 square feet or 41.6% of all retail commercial space Town-wide.
- Hamlets and Rural Areas: 131,600 square feet or 3.0% of all retail commercial space Town-wide.

The following summary observations are made with respect to the Milton inventory of retail commercial space:

3.2.1 Milton Town Wide

Milton is comprised of 4,327,200 square feet of occupied and vacant retail commercial space. This space is comprised of:

- 571,800 square feet of FBR.
- 1,408,300 square feet of NFBR.
- 2,118,500 square feet of Service space.
- Vacant space accounts for 228,600 square feet resulting in a vacancy rate of 5.3%.
- The overall Town of Milton has 27 square feet of retail commercial space per resident.

3.2.2 Existing and New Complete Neighbourhood Inventory

The Existing and New Complete Neighbourhoods includes 2,394,400 square feet of occupied and vacant retail commercial space. This space accounts for 55.3% of all retail commercial space in Milton:

- Milton Central comprises approximately 1,788,000 square feet, representing 41.3% of Milton's total retail commercial space. Milton Central includes the downtown. This space is comprised of:
 - 284,000 square feet of FBR.
 - 467,200 square feet of NFBR.
 - 936,600 square feet of Service space.
 - Vacant space accounts for 100,200 square feet resulting in a vacancy rate of 5.6%.
 - The Milton Central area has 69 square feet of retail commercial space per resident.
- Bristol comprises approximately 252,600 square feet, representing 5.8% of Milton's total retail commercial space. This space is comprised of:
 - 63,500 square feet of FBR.
 - 58,200 square feet of NFBR.
 - 124,700 square feet of Service space.
 - Vacant space accounts for 6,200 square feet resulting in a vacancy rate of 2.5%.

- Bristol has 4 square feet of retail commercial space per resident.
- Sherwood & Milton Heights comprises approximately 245,400 square feet, representing 5.7% of Milton's total retail commercial space. This space is comprised of:
 - 104,200 square feet of FBR.
 - 32,400 square feet of NFBR.
 - 101,100 square feet of Service space.
 - Vacant space accounts for 7,700 square feet resulting in a vacancy rate of 3.1%.
 - Combined, the Sherwood and Milton Heights area has 2 square feet of retail commercial space per resident.
- Boyne comprises approximately 96,300 square feet, representing 2.2% of Milton's total retail commercial space. This space is comprised of:
 - 47,400 square feet of FBR.
 - 3,200 square feet of NFBR.
 - 45,700 square feet of Service space.
 - Boyne has 5 square feet of retail commercial space per resident.
- Trafalgar comprises approximately 12,100 square feet, representing 0.3% of Milton's total retail commercial space. This space is comprised of:
 - 11,600 square feet of NFBR.
 - 500 square feet of Service space.
 - Trafalgar has 24 square feet of retail commercial space per resident.

3.2.3 Employment, Commercial and Other Areas

Employment, commercial and other areas includes 1,801,200 square feet of occupied and vacant retail commercial space. This space accounts for 41.6% of all retail commercial space in Milton:

- The Employment Districts (401, Agerton (N), Bronte Triangle, Derry Green, Milton 407 Expansion) comprises approximately 942,400 square feet, representing 21.8% of Milton's total retail commercial space. This space is comprised of:
 - 9,600 square feet of FBR.
 - 195,200 square feet of NFBR.
 - 647,600 square feet of Service space.
 - Vacant space accounts for 90,000 square feet resulting in a vacancy rate of 9.6%.
- Steeles-Maple Commercial comprises approximately 849,300 square feet, representing 19.6% of Milton's total retail commercial space. This space is comprised of:
 - 44,800 square feet of FBR.
 - 596,200 square feet of NFBR.
 - 193,800 square feet of Service space.
 - Vacant space accounts for 14,500 square feet resulting in a vacancy rate of 1.7%.
- Greenbelt (Urban - Sixteen E) comprises approximately 9,500 square feet, representing 0.2% of Milton's total retail commercial space. This space is comprised of:
 - 400 square feet of FBR.
 - 9,100 square feet of NFBR.

3.2.4 Hamlets and Rural Areas

Hamlets and Rural Areas include 131,600 square feet of occupied and vacant retail commercial space. This space accounts for 3.0% of all retail commercial space in Milton:

- Hamlets include Campbellville, Moffat and Brookville. They comprise approximately 104,400 square feet, representing 2.4% of Milton's total retail commercial space. This space is comprised of:

- 11,000 square feet of FBR.
 - 25,200 square feet of NFBR.
 - 60,200 square feet of Service space.
 - Vacant space accounts for 8,000 square feet resulting in a vacancy rate of 7.7%.
 - Hamlets have 22 square feet of retail commercial space per resident.
- Milton Rural comprises approximately 27,200 square feet, representing 0.6% of Milton's total retail commercial space. This space is comprised of:
 - 6,900 square feet of FBR.
 - 10,000 square feet of NFBR.
 - 8,300 square feet of Service space.
 - Vacant space accounts for 2,000 square feet resulting in a vacancy rate of 7.4%.

3.3 Milton Retail Commercial Formats

Retail commercial space is delivered in various formats including main street retail, ground floor commercial in street facing townhomes, strip plazas, big and mid box stores as well as indoor commercial. There is ground floor commercial in high density developments in under construction, however in the short to medium term this type of space will only represent a small portion of the overall retail commercial supply.



Tate Research - 9037 Derry Rd. E.



Tate Research - 629 Holly Ave.



Tate Research - 9040 Louis St. Laurent



Tate Research - 611 Holly Ave.



Tate Research - 208 Main St. E.



Tate Research - 830 Main St. E.



Of note is developments such as Thompson Square (9037 Derry Rd. E.) which include fully leased internal facing live work space. Typically, internal facing sites with no drive through traffic or visibility would face challenges. However, in part due to the lack of commercial supply, the internal units are fully leased. These live work units also indicate demand for a type of commercial that is typically not favoured by developers.

3.4 Retail Commercial Inventory Summary Conclusions

Milton has a broad range of retail commercial space in various formats and types. There are a variety of retail types from national chains to independent businesses. This space is delivered in various formats including main street retail, big and mid box retail, strip plaza, live work and mixed-use.

4 Retail Commercial Inventory – Analysis

This section of the report provides an analysis of the inventory of retail commercial space in Milton.

4.1 Milton Retail Commercial Space Per Capita Analysis

Figure 4-1 illustrates Milton's retail commercial space per capita ratios over time based on data from TR and other consultants. Figure 4-2 provides a comparison of the per capita ratios based on Town-wide inventories completed by TR.

Figure 4-1: Analysis of Milton Retail Commercial Space– Historic and Current

Year	1998 ¹	2002 ¹	2005 ¹	2013 ²	2020 ³	2025 ²
Retail Commercial Space (sq. ft.)	1,207,697	1,278,053	1,879,276	3,474,800	3,825,000	4,327,200
Percent Growth		6%	47%	85%	10%	13%
Population	33,950	39,120	49,000	91,600	135,000	157,900
Percent Growth		15%	25%	87%	47%	17%
Retail Commercial Space Per Capita	35.6	32.7	38.4	37.9	28.3	27.4

Source: Tate Research

¹⁾ W. Scott Morgan & Associates Limited inventory.

²⁾ Tate Research inventory.

³⁾ Ward Land Economics Inc. inventory.

Figure 4-2: Comparison of Milton Retail Commercial Space

	Milton (2025)	Halton Hills (2024)	Oakville (2014)	Vaughan (2020)	Guelph (2017)
Total	27.4	39.9	45.8	54.7	56.8
FBR	3.6	6.8	5.4	5.3	5.8
NFBR	8.9	18.1	20.3	26.1	21.9
Service	13.4	13.5	20.2	23.3	29.2
Supermarket	2.6	4.8	4.3	3.1	3.9
Total	100.0	145.7	167.1	199.5	207.3
FBR	100.0	188.2	148.2	145.8	159.1
NFBR	100.0	203.3	227.1	292.3	245.3
Service	100.0	101.0	150.3	173.9	217.3
Supermarket	100.0	186.8	164.9	120.1	149.7

Conditional Formatting: Smallest to Largest Difference Benchmarked to Milton

Source: Tate Research

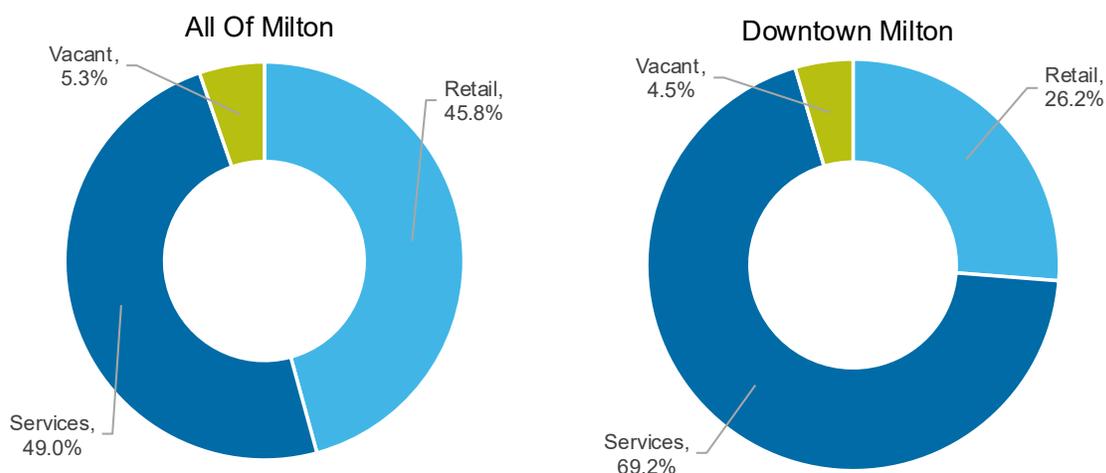
The following observations are made with respect to the per capita ratios:

- The amount of retail commercial space per capita in Milton peaked around 2005 when there was 38.4 square feet per capita.
- Since 2005, there has been a gradual decrease in the retail commercial space per capita. The current retail commercial space per capita is approximately 27.4 square feet.
- When examined against other municipal wide commercial inventories conducted by TR, it is apparent that Milton has the lowest retail commercial space per capita. In all cases, the difference is significant.
 - The largest difference is in the NFBR category, with all other municipalities having more than twice as much NFBR space on a per capita basis.
 - Generally, Milton's low NFBR retail commercial space per capita ratio can be attributed to the lack of a regional indoor mall or a large regional concentration of mid-box stores beyond the Steeles Maple Commercial Area.
- As noted in Section 2.2, supermarkets are the building blocks of neighbourhood commercial and typically also spur adjacent commercial development. Historically, the benchmark for supermarket space has been around 3.5 square feet per capita. Milton's supermarket per capita is 2.6 square feet.¹ This supermarket per capita is lower than the sample municipalities. It should be noted that although Vaughan has a low supermarket per capita, it is mitigated by a larger number of specialty food stores. In the case of Milton, the low supermarket per capita is a reflection of the lack of supermarket space with more limited mitigating factors.

4.2 Milton Retail Commercial Function

Figure 4-3 provides an analysis of the Milton inventory of retail commercial space.

¹ This excludes the Walmart supercentre grocery component. If we assume 50,000 square feet of supermarket space within the Walmart, the resulting per capita would be 2.9 square feet.

Figure 4-3: Milton and Downtown Milton – Retail Commercial Function

Source: Tate Research

The following observations are made with respect to the inventory:

- The general retail commercial function of a plaza, node, planning district or area can be analysed by the distribution of retail versus service space. Retail space typically provides more opportunities to be destination oriented and draw in shoppers from a larger trade area thereby supporting ancillary retail and service businesses.
- Overall, in Milton, retail space comprises 45.8% of total retail commercial space, while services comprise 49.0% and vacant space represents 5.3%.
 - While the typical retail / service distribution will vary, a general ratio to aspire to would be 60 retail / 40 service. Shopping Centres for example try to have the ratio closer to 80 / 20. Therefore, the low ratio of retail space would typically indicate a large outflow of retail dollars to surrounding markets to fulfill the retail spend.
 - The vacancy rate is 5.3%. A normal vacancy rate is between 5.0 – 7.5%. The Milton vacancy rate is indicative of a healthy market in the terms of demand for retail commercial space.
- In Downtown Milton (located in Old Milton North) the retail space comprises 26.2% of the total retail commercial space, services comprise 69.2% and vacant space represents 4.5%.
 - The large amount of service space versus retail space is an indication of a more convenience function of the downtown.

- The three largest categories of space in Downtown Milton are all service related. These three categories are Food Services & Drinking Places, Personal Care & Laundry Services and Health Care & Social Assistance Services which comprise 55.5% of the retail commercial space.
- The vacancy rate of 4.5% is below typical levels and is an indication that additional commercial space would be absorbed if built.

The retail function of Downtown Milton is also influenced by a number of other factors such as block spacing, door spacing, street width, sidewalk width, parking & accessibility, building facades, building scale & proportions and public space. This report has not examined these physical attributes, however, based on our professional experience, they all play an important role in defining the downtown.

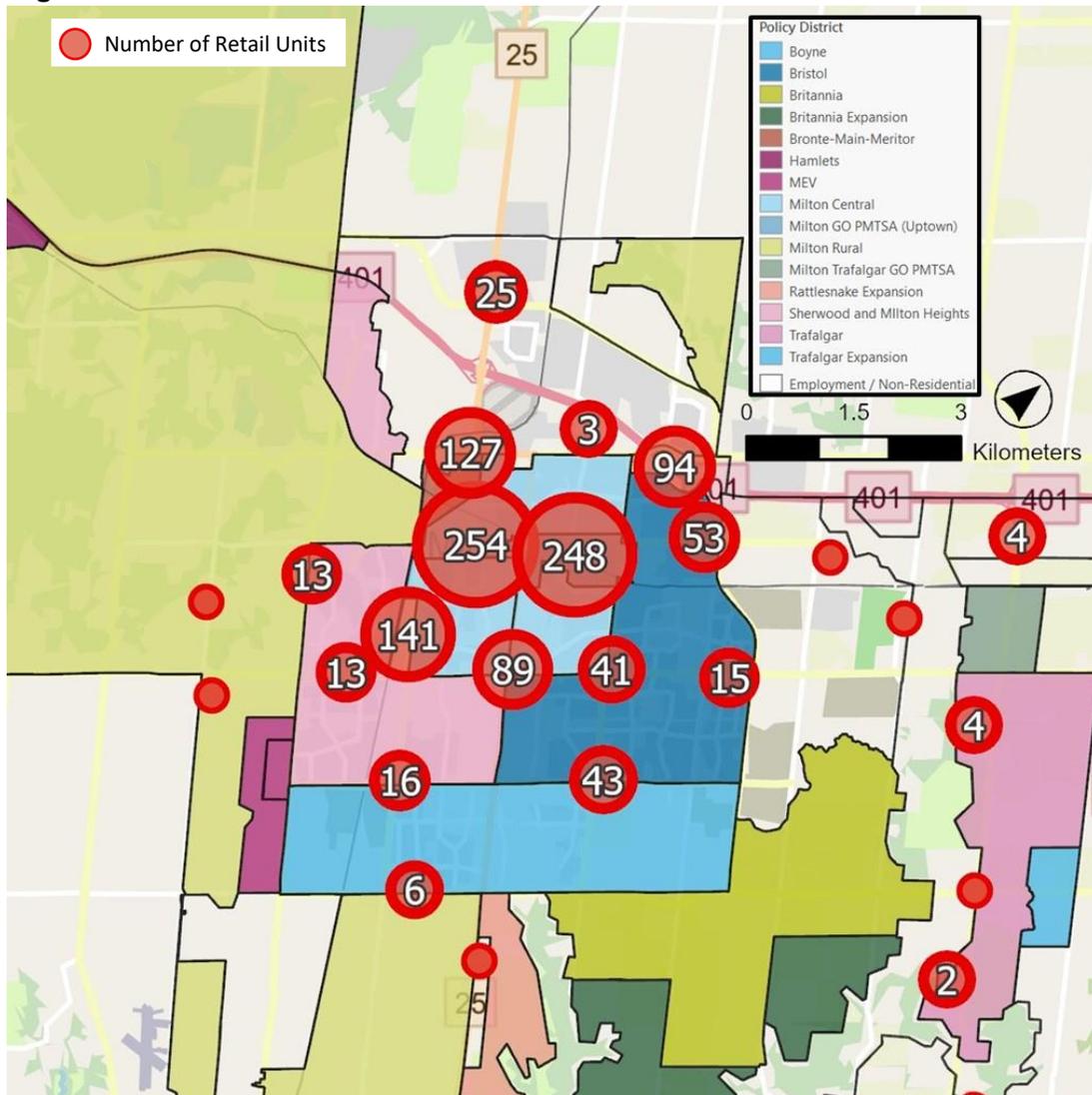
4.3 Milton Geographic Distribution

Figure 4-4 illustrates the geographic distribution of commercial space in Milton based on number of units and by PPAs, PDs and Growth Phase.

The following observations are made with respect to the geographic distribution of space:

- The Employment areas and Steeles-Maple Commercial account for 41.6% of all retail commercial space in Milton. The Milton GO PMTSA (Uptown) accounts for 25.4% of all retail commercial space in Milton. The Existing and New Complete Neighbourhoods (excluding Milton GO PMTSA) and Hamlets/Rural Areas account for 30.0% and 3.0% respectively.
- PDs such as Bristol and Sherwood & Milton Heights have low retail commercial per capita space ratios. While this is mitigated by their proximity to the Downtown and employment areas, there is still a lack of neighbourhood commercial in these areas.
- It should be noted that future and developing areas such as Boyne, Britannia and Trafalgar are all located further away from established commercial areas and Downtown.

Figure 4-4: Retail Commercial Distribution



Source: Tate Research. Basemap: Esri ArcGIS.

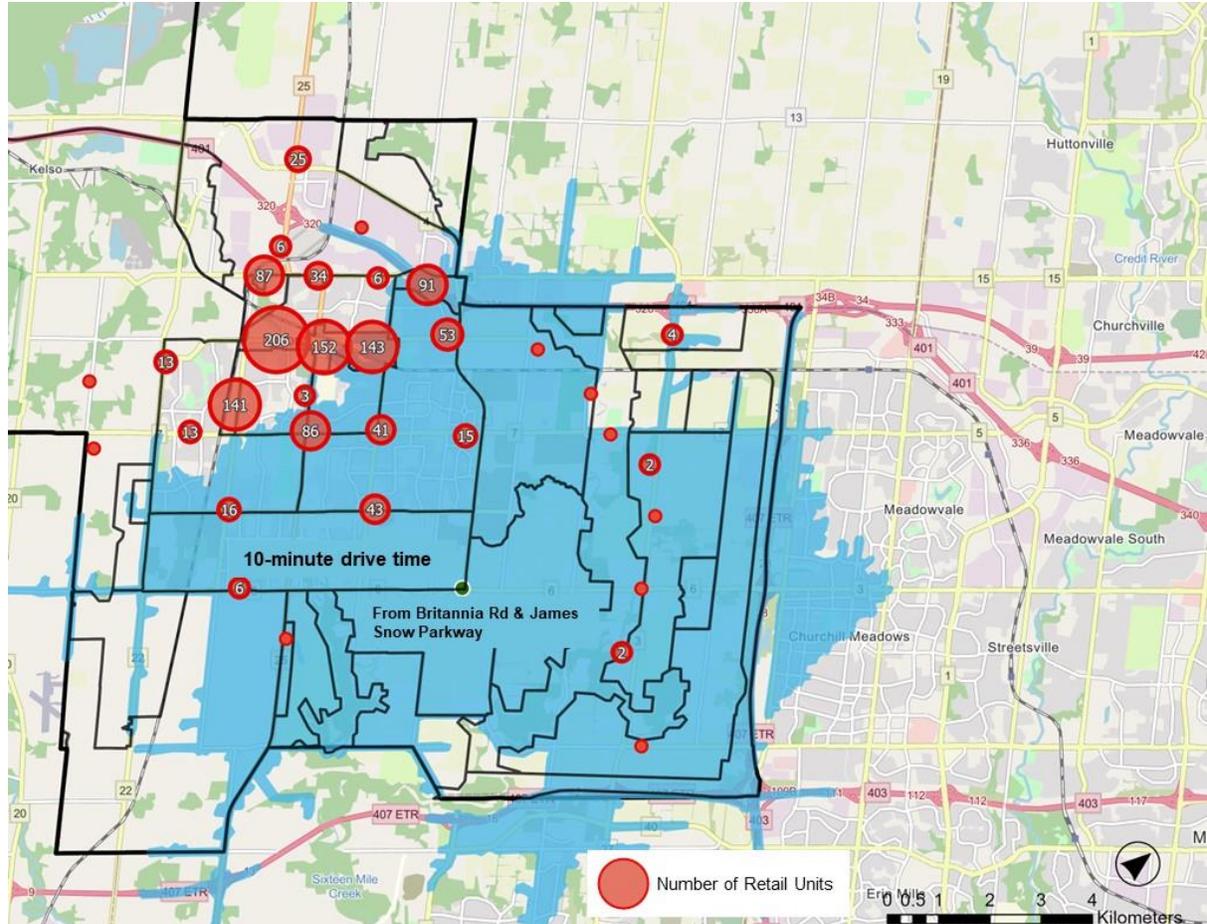
Figure 4-5 illustrates a 10-minute drive time from the Britannia PPA.

The following observations are made with respect to the proximity of existing retail commercial concentrations to residents of future neighbourhoods:

- A significant portion of the existing retail commercial space is beyond a 10-minute drive time from the central area of the Britannia PPA.
- This implies that Britannia residents will not have ease of access to the full range of retail commercial space in Milton.

- Conversely, this also implies that existing space in the Downtown and Milton GO PMTSA (Uptown) may not have strong support from future residents in new neighbourhoods due to the distance factors.

Figure 4-5: Britannia 10-Minute Drive Time



Source: Tate Research. Basemap: Esri ArcGIS.

4.4 Retail Commercial Inventory Analysis Conclusions

Milton is underserved with respect to retail commercial space. The current condition is likely the result of a mix of planning and market factors which have limited commercial development on the scale required. There are numerous market and planning implications of an underserved market:

- At some point, the quality of the shopping experience could diminish as existing retailers and service providers serve more customers from their current stores.
- Traffic will increase and associated quality of life indicators may diminish as more commute time is devoted to fulfilling daily and weekly shopping trips.

- Existing retailers will experience larger market shares, higher sales per square foot levels and potentially a reluctance to expand store networks.
- There could be a lost opportunity in terms of local employment, as less retail commercial space limits these jobs.
- A reduction in the commercial portion of tax revenues could result from less commercial development, placing a greater burden on the residential taxpayer.

5 Commercial Needs Analysis

Municipal Retail Commercial Needs Studies have become increasingly complex. In the past, demand for retail space would be quantified and balanced against the amount of greenfield land. The demand and supply sides have become more complicated. On the demand side, e-commerce, changing demographics and shopping habits, as well as new store network requirements have meant re-thinking and segmenting commercial demand into components that are store based, and components that can be fulfilled through other means, including e-commerce, click & collect, and 'buy online pick up in store'.

This section of the report assesses the quantum of retail commercial space that could potentially be supported in Milton.

5.1 Commercial Needs Methodology

From a retailer perspective, the industry is moving towards the understanding that “a sale is a sale” regardless of where that sale occurs, whether physically in a store or online and delivered or bought online and picked up in store. The intent is to provide the customer with a seamless interchangeable experience whether in store or online.

For studies such as this one, one of the issues to be addressed is how much physical commercial space should be planned for and whether the existing policy structure is appropriate to facilitate this space. Therefore, for this analysis, we have made assumptions of how much of future retail commercial space will be served through “ground oriented” retail commercial space accounting for the fact a portion of demand will be served through e-commerce.²

We have conducted an expenditure analysis for the FBR and the NFBR categories. Combined, these categories represent the “retail” categories, and include physical locations where goods are purchased.

We have utilized a per capita approach to quantify the future service space needs of Milton residents. The service category represents physical locations

² “Ground oriented” retail commercial space includes 2nd and 3rd floors within mixed-use buildings.

where services are purchased or rendered such as bank branches, restaurants, hair salons, etc.³

5.2 Population Growth

The primary factor driving any retail expenditure and per capita analysis is population. Figure 5-1 summarizes the base population forecast for the Town.

Figure 5-1: Town of Milton Population Forecast

	<i>Preliminary</i>			<i>Milton Forecast</i>	<i>Milton Forecast</i>	<i>Milton Forecast</i>	<i>Milton Forecast</i>	<i>Milton Forecast</i>	2025 - 2051
	<i>Census (adjusted)</i>	<i>Post Censal</i>	<i>Growth Based</i>						
	2021	2024	2025	2031	2036	2041	2046	2051	
Town of Milton	138,930	152,800	157,900	245,800	292,000	333,900	370,200	400,400	
Period Change		13,870	5,100	87,900	46,200	41,900	36,300	30,200	242,500
Average Annual Growth		4,623	5,100	14,650	9,240	8,380	7,260	6,040	8,981
Average Annual Growth		3.0%	3.3%	9.3%	3.8%	2.9%	2.2%	1.6%	5.9%

Source: Tate Research; Statistics Canada Population Estimates by Census Subdivision, Table 17-10-0155-01. Town of Milton Forecasts. Rounded to the nearest 100 persons.

The following observations are made with respect to Figure 5-1:

- The base year for this analysis is 2025. The 2025 base year population is based on the 2024 postcensal estimate for Milton adjusted for growth based on 2021 – 2024 historic annual growth rate of 3.3%.
- TR estimates the 2025 population of Milton to be 157,900. This represents a growth of approximately 5,600 persons from the 2024 postcensal estimate.
- The population of Milton is forecast to reach 400,400 persons by 2051. This represents an increase of 242,500 persons from the 2025 population.
- In a general sense, the population of Milton is forecast to more than double by the end of the study period, 2051.

Figure 5-2 illustrates the population distribution of the PPAs and PDs analysed. The graphic illustrates the distribution of growth in each study period. The following observations are made with respect to Figure 5-2:

³ Category definitions are found in Appendix B

- Boyne, Britannia and Trafalgar are expected to experience considerable growth in the 2025 – 2031 period.
- Post 2031, considerable population growth is expected to continue in Britannia and Trafalgar and will begin in the Britannia Expansion area. This trend is expected to continue post 2041 and will include considerable growth forecast for the Rattlesnake Expansion area.
- Throughout the study period, steady growth is forecast for the Agerton / Trafalgar GO and MEV. The Milton GO PMTSA (Uptown) is forecast to experience strong growth between 2025 – 2031 and then taper off.

Figure 5-2: Milton Population Distribution (2025 – 2051)

	2025	2031	2036	2041	2046	2051	2025-2051
Population Forecasts							
Population	157,900	245,800	292,000	333,900	370,200	400,400	
Population Growth		87,900	46,200	41,900	36,300	30,200	242,500

	2025	Population Growth Per Period					2051
		2025 - 31	2031 - 36	2036 - 41	2041 - 46	2046 - 51	
Milton Central ⁽¹⁾	24,200	1,600	700	400	300	300	27,500
Bronte-Main-Meritor	300	1,300	500	1,200	1,200	400	4,900
Milton GO PMTSA (Uptown)	1,400	7,400	2,300	2,000	1,400	800	15,300
Bristol	60,200	0	300	100	200	0	60,800
Sherwood & Milton Heights	41,000	1,000	1,100	500	500	100	44,200
Boyne	21,500	24,000	1,200	1,100	300	200	48,300
Britannia	200	25,200	10,900	10,700	6,200	3,300	56,500
Trafalgar	100	18,800	9,000	7,100	4,700	1,300	41,000
Milton Trafalgar GO PMTSA	-	3,400	2,900	2,400	2,500	2,900	14,100
Milton Education Village	-	4,800	4,500	4,400	2,200	1,000	16,900
Rattlesnake Expansion	0	0	2,100	2,800	5,500	5,600	16,000
Britannia Expansion	0	0	9,000	8,000	9,600	13,000	39,600
Trafalgar Expansion	0	0	1,600	1,100	1,500	1,200	5,400
Hamlets	2,000	200	100	100	100	-	2,500
Rural	6,500	100	100	-	100	-	6,800
Other	1,000	0	0	0	0	0	1,000
Total	158,400	87,900	46,200	41,900	36,300	30,200	400,800

Conditional Formatting: Lowest to Highest Population / Growth

Source: Tate Research, based on population ESRI Business Analyst and forecasts from Town of Milton.

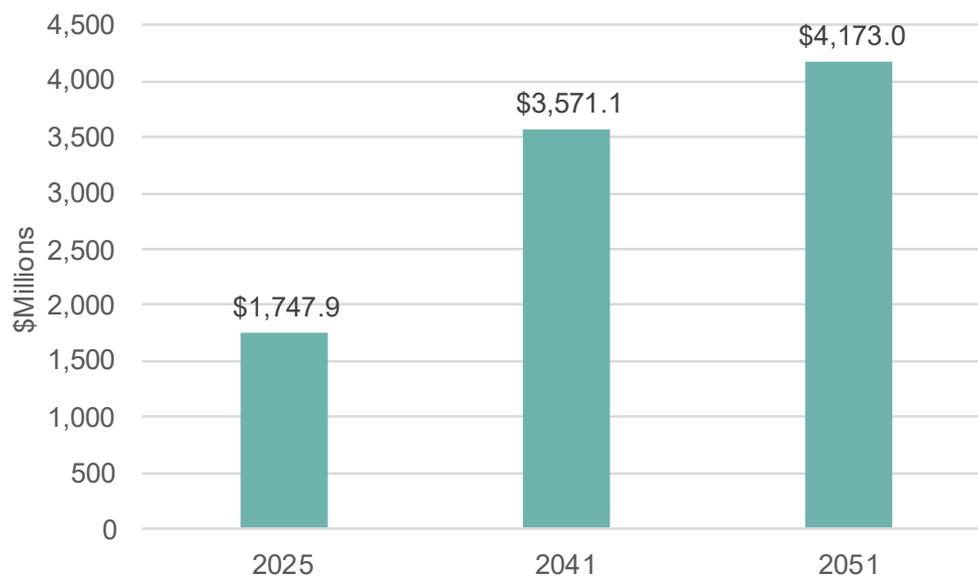
5.3 Retail Expenditure Growth

Figure 5-3 illustrates the Town’s retail expenditures for the 2025, 2041 and 2051 period.⁴ Figure 5-2 illustrates that retail expenditures are forecasted to increase from the current level of \$1,747.9million annually to \$4,173.0 million annually by 2051. This represents an increase of \$2,425.1 million in annual expenditures by 2051.

⁴ Retail expenditures are calculated for the FBR – Food Oriented Retail and NFBR – Non-Food Oriented Retail categories. See Appendix B for background calculations.

- The expenditure potential in Figure 5-3 represents the estimated amount that Town residents currently spend, and are forecast to spend, at physical retail stores, excluding e-commerce purchases. These purchases may occur at stores in the Town or beyond.
- For the future years, from the land use planning perspective, the implication of the significant increase in expenditure potential is the requirement for an increase in retail commercial space to serve this demand.

Figure 5-3: Town of Milton FBR and NFBR Expenditure Forecast



Source: Tate Research, see Appendix B for detailed calculations.

5.4 Commercial Needs Analysis 2024 – 2051

Figure 5-4 illustrates the additional retail commercial space required by 5-year increments based on population growth and TR adjustments as well as 2051 commercial needs and the resulting retail commercial space per capita. The following notes relate to the findings summarized in Figure 5-4:

- Column A – These are the Planning Districts and Planning Policy Areas that TR in consultation with Planning Staff agreed to study.
- Column B – This is the existing commercial inventory in the Town of Milton. This inventory can be cross referenced with Figures 3-3 to 3-5 in this report.

Figure 5-4: Town of Milton 2051 Retail Commercial Needs (square feet)

Planning District / Planning Policy Area	Existing Retail Commercial Inventory (2025)	Column C				
		2025 - 31	2031 - 36	2036 - 41	2041 - 46	2046 - 51
Milton Central ⁽¹⁾	688,800	37,200	11,900	5,600	3,000	1,800
Bronte-Main-Meritor	2,000	29,500	8,500	16,700	11,900	2,400
Milton GO PMTSA (Uptown)	1,097,200	166,300	39,200	27,800	13,900	4,800
Bristol	252,600	0	5,100	1,400	2,000	0
Sherwood & Milton Heights	245,400	23,300	18,700	6,900	5,000	600
Boyne	96,300	542,600	20,400	15,300	3,000	1,200
Britannia		570,400	187,400	147,100	62,600	19,800
Trafalgar	12,100	424,100	155,000	97,100	47,700	7,800
Milton Trafalgar GO PMTSA		77,300	49,400	33,300	24,800	17,400
MEV		109,100	76,600	61,100	21,900	6,000
Rattlesnake Expansion		0	35,800	38,900	55,600	33,000
Britannia Expansion		0	155,000	109,600	96,400	76,800
Trafalgar Expansion		0	27,300	15,300	14,900	7,200
Hamlets	104,400	4,000	1,700	1,400	1,000	0
Rural	27,200	2,300	1,700	0	1,000	0
Other	1,801,200	220,700	88,200	64,200	40,500	19,900
Total	4,327,200	2,206,800	881,900	641,700	405,200	198,700
A	B	C				

Planning District / Planning Policy Area	New Warranted 2025 - 2051	Development Applications (as of 2025)	Potential 2051 New Space Required	Total Existing + New 2051	2051 Pop	2051 Per Capita
Milton Central ⁽¹⁾	59,500	21,900	37,600	748,300	27,500	27.2
Bronte-Main-Meritor	69,000	49,000	20,000	71,000	4,900	14.5
Milton GO PMTSA (Uptown)	252,000	5,400	246,600	1,349,200	15,200	88.8
Bristol	8,500	21,400	n.a.	261,100	60,700	4.3
Sherwood & Milton Heights	54,500	56,000	n.a.	299,900	44,300	6.8
Boyne	582,500	164,700	417,800	678,800	48,100	14.1
Britannia	987,300		987,300	987,300	56,500	17.5
Trafalgar	731,700	5,300	726,400	743,800	41,000	18.1
Milton Trafalgar GO PMTSA	202,200		202,200	202,200	14,100	14.3
MEV	274,700		274,700	274,700	16,900	16.3
Rattlesnake Expansion	163,300		163,300	163,300	16,000	10.2
Britannia Expansion	437,800		437,800	437,800	39,500	11.1
Trafalgar Expansion	64,700		64,700	64,700	5,400	12.0
Hamlets	8,100		8,100	112,500	2,500	45.0
Rural	5,000		5,000	32,200	6,800	4.7
Other	433,500	101,500	n.a.	2,234,700	1,000	n.a.
Total	4,334,300	425,200	3,909,100	8,661,500	400,400	21.6
A	D	E	F	G	H	I

Source: Tate Research, see Appendix B for detailed calculations.

¹⁾ Milton Central excludes Bronte-Main-Meritor and Milton GO PMTSA (Uptown)

- Column C – The warranted demand for each time interval of the study period is indicated in the various columns labelled ‘Column C’. This demand is based on the analysis summarized in Appendix B which quantifies the amount of additional FBR, NFBR and Service space. The demand analysis is a residual analysis which quantifies new demand based on population growth after accounting for e-commerce, capture rates and inflow.

TR has assumed that 10% of Milton wide demand will be accommodated in employment lands. After netting out this demand which is accounted for in the “Other” PD / PPA, TR has distributed the remaining demand based on population growth within each PD / PPA. Column C provides demand in 5-year increments.

- Column D – This is the total amount of new retail commercial space warranted in 2051.
- Column E – This is the amount of the total new retail commercial space that will be accommodated by retail commercial space currently within development applications based on information from the Town. This information is detailed in Appendix C.
- Column F – This is net amount of new space warranted in the PD / PPAs by 2051, recognizing the total amount of new retail commercial space warranted in 2051 (Column D) and deducting the amount to be accommodated by retail commercial space currently within development applications (Column E).
- Column G – This is the total amount of space in 2051 including the space that currently exists.
- Column H – This is the 2051 forecast population for the PD / PPAs.
- Column I – This is the resulting 2051 retail commercial space per capita.

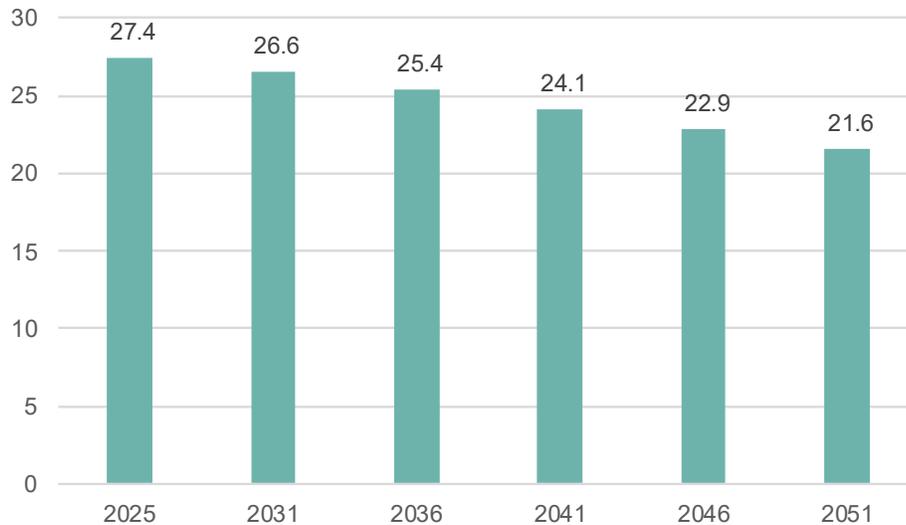
5.5 Commercial Needs Analysis Notes

The commercial needs analysis represents a point in time. The resulting 2051 warranted demand is highly dependent on population forecasts being achieved as well as market conditions that, in many cases, are independent of demand. Despite these limitations, the warranted demand can serve as a valuable benchmark when assessing development applications as well as formulating Official Plan goals and policies. The following notes provide context for the commercial needs analysis:

- It is impractical to assume retail demand can be accurately forecast to a narrow range beyond a 5 to 10 year period given the rapid pace in which innovation is occurring with respect to the delivery of retail goods and services. Therefore, TR has provided the warranted demand as total Retail Commercial versus individual store categories.

- It should be noted that TR has assumed that the future population will require less retail and service space, on a per capita basis due to the impacts of e-commerce and other market related factors. Currently, there is approximately 27.4 square feet per capita of occupied and vacant retail commercial. By 2051 the retail commercial space per capita is forecast to be 21.6.

Figure 5-5: Town of Milton Retail Commercial Per Capita Forecast



Source: Tate Research.

- The analysis does not attempt to rectify the fact that presently Milton is underserved in terms of retail commercial space per capita. For example, Milton would have to add 2,000,000 square feet at its current population to match Halton Hills' current ratio of 39.9 square feet per capita of retail commercial space. It is the opinion of TR that this is not feasible from a market and development perspective.
- Due to the starting deficit in retail commercial space, resulting per capita ratios in PDs / PPAs such as Bristol and Sherwood & Milton Heights in 2051 remain low.
- Despite the accommodation for e-commerce and other market related factors, a portion of the warranted space is still considered "notional" and may not be realized. We refer to this space as notional for the following reasons:

- As illustrated in Figure 5-2, population growth of 13,800 persons is forecast within the Milton GO PMTSA (Uptown). There may not be reasonable opportunities to locally accommodate the retail commercial space that is warranted by this population growth. Notional demand occurs in a situation such as this, when new market demand materializes within or in proximity to mature commercial areas with an established retail and service commercial hierarchy. The future demand can be serviced by the existing retail service commercial space, resulting in higher performance levels at existing operations.
- The chain retail industry in Canada is highly consolidated. For example, the top 100 conglomerates in Canada account for close to 75% of retail trade sales in 2020. The implication of this statistic is that many retailers are reluctant to add additional banners to established markets for fear of cannibalizing their own store sales.
- This analysis is based on residential population forecasts. It does not explicitly account for additional demand as a result of projected office employment such as that planned within the Milton Trafalgar GO PMTSA. This demand would be in addition to that identified in this study.
- It is the opinion of TR that supermarket anchored developments are critical to healthy neighbourhoods as well as spurring additional development in the surrounding areas. The analysis in Appendix B identifies demand for 392,000 square feet of additional supermarket space by 2051. Currently there is 409,400 square feet of supermarket space. If the 392,000 square feet of new demand is added to the existing space plus a 50,000 square foot allowance for the food space in the Walmart, by 2051 there would be 851,400 square feet of supermarket space. This would represent a supermarket space per capita of 2.12 square feet. The resulting low supermarket per capita indicates how critical it is to ensure the opportunity for supermarket developments in new neighbourhoods is realized.

5.6 Commercial Needs Analysis Summary

The Town is forecast to experience significant population growth to 2051. This growth will be accompanied by demand for additional retail commercial space. In theory, the Town should not have any limitation in accommodating future growth due to the abundance of greenfield land and opportunities for intensification and the ability of these intensification opportunities to accommodate retail commercial space.

However, there may be challenges associated with ensuring retail commercial space is built due to the current nature of the development environment and the reduced financial returns generated by retail commercial development vis-a-vis other asset classes, such as residential. Furthermore, residential intensification of existing retail commercial sites often results in a *decrease* in commercial space, therefore the Town may have to implement policies regarding the preservation of retail commercial space.

These challenges should be balanced against the importance of retail commercial in planning for complete communities. A cornerstone of resilient neighbourhoods is the provision of a range of goods and services that reflect the diversity of its residents. In many instances the identity of a neighbourhood is tied to its commercial offerings. However, the provision of retail commercial space goes beyond the transactional nature. Retail commercial space provides opportunities for residents to meet and build social capital and a vibrant ground floor results in greater community health. The provision and protection of retail commercial space is critical to city building, particularly in a rapidly growing community such as Milton.

6 Consultation Summary

Stakeholder consultation was undertaken with representatives of the development community and major retailers operating in Milton. The Town provided an introductory letter for these sessions and TR initiated contact with the stakeholders. Virtual interviews were conducted by TR in September and October of 2025. Interview participants tended to be owners and senior members of the planning and development teams.

In the interviews, stakeholders were introduced to the concept of the Town-Wide Retail Commercial Needs Study and were informed that the findings of this background paper will be used as input into the updated Official Plan to be conducted by the Town. TR led the discussions and the following points summarize the major themes of our stakeholder interviews.

It should be noted that the comments in this section represent the opinion and suggestions of the stakeholders. The inclusion of these in the report does not represent an endorsement of these opinions and suggestions. Where appropriate, TR has considered the opinion and suggestions when formulating our policy directions in Chapter 7.

6.1 General Findings

There were overriding themes that were prevalent in the majority of the consultation sessions:

- There is an overall consensus that Milton is under-stored with respect to retail commercial development.
- Milton is an attractive market for additional retail commercial development, given its current level of supply and the forecast population growth.
- Retail commercial is challenging to develop in Milton, and throughout the Greater Toronto Area. Economic factors, such as land and construction costs have impacted the ability to develop retail commercial space.

6.1.1 Mixed-Use

The stakeholder sessions included discussions concerning the retail commercial component of mixed-use developments. The following points summarize the themes of this discussion:

- Customers drive past mixed-use developments to get to surface parking lots. There is a culture of shopping in open concept, big box retail centres with parking at the front door. These centres comprise the majority of retail commercial space in Milton and remain attractive and convenient for customers.
- Easily accessible parking is important. Customers prefer at-grade parking. If underground parking is required, it changes economics of the development and makes it a difficult proposition.
- Retail space in mixed-use projects is difficult to design and operate. From the customer perspective, it is less desirable as it typically requires less convenient parking than other similar offerings in the Town or elsewhere.
- From the operator's perspective, issues such as frontage, store design, loading, garbage, escalator / elevator installation and operation costs and other factors are significant.
- From the retailer perspective, Milton is a market that is not being considered for mixed-use development. There is limited desire of any major retailer to operate in a mixed-use building in a suburban market such as Milton.
- Developers noted that there is a link between the residential market and the ability to develop retail commercial uses in a mixed-use format. Since the residential market is currently very challenging, there is an impact on the ability to develop any commercial component that would form part of a primarily residential development project.
- Market opportunities for second floor commercial in a mixed-use concept are limited. They could include uses such as daycare, medical / dental and locally oriented offices. Typical retail commercial uses are not interested in second floor locations in Milton.

6.1.2 Development Opportunities

Both retailers and developers note the lack of retail commercial development in Milton. In particular, the following points summarize the opportunities:

- Major retailers have prototypes that have considerable land requirements. There are limited opportunities in Milton for freestanding, traditional, single purpose retail commercial development.

- Britannia Road was noted as a potential location for a larger scale commercial centre. It could represent a location for a second (or other) unit for chains that are already operating in Milton.
- Market opportunities in the west end of Milton, potentially even mixed-use.
- There is strong interest from quick service restaurants in Milton plazas. There are major chains not represented in Milton. Retailer commercial operators and leasing reps indicate a lack of available space.
- It was noted that there is limited commercial land in Milton and that ownership of commercial land is concentrated, which may impact opportunities for retailers.

6.1.3 Town Role in Increasing Retail Commercial Opportunities

It is recognized that many factors, such as construction costs, are beyond the control or influence of any municipality. However, there was discussion about factors that the Town could implement to spur retail commercial development. These factors include:

- Reduction in Development Charges.
- Allow even more flexibility in permitted uses in employment areas to increase the supply of retail commercial, particularly service commercial, uses.
- Create commercial only designations – with the indirect goal of influencing (reducing) land values that could therefore make retail commercial development more economically feasible.
- Increase the availability of retail commercial land that could be developed for single purpose commercial uses. In the longer term, these centres could be intensified and / or redeveloped for other uses, such as higher density residential.

6.2 Stakeholder Consultation Summary

Developers and retailers are positive about Milton. There are challenges that relate to supply, and there is a strong preference for traditional, single purpose, single storey, retail commercial centres with at grade parking. It is understood that Milton is under-stored and therefore provides opportunities.

7 Policy Directions

This section summarizes specific policy directions based on TR's analysis of relevant background information and data. These policy directions are intended to be relatively high-level, however, and it is not the purpose of this document to provide detailed planning policies, which will be formulated in later phases of the Official Plan Review.

7.1 Policy Direction 1: Consider the protection of existing retail commercial space

It is anticipated that a portion of future retail commercial space in Milton will be delivered through mixed-use development. Depending on the context, these mixed-use developments could be built on greenfield lands or through intensification / redevelopment, as will likely be the case in Milton Uptown.

One of the challenges from the retail planning perspective is to ensure that policies are flexible enough to encourage and support retail development, while providing the opportunity for viable projects for both developers and retail operators. Many of these challenges are site specific (parking, loading, signage, noise, lighting, etc.,) and can be appropriately planned through urban design, zoning and site planning stages of the approvals process. However, there are some overall controls that may be required to protect existing retail which is under considerable pressure from intensification.

New mixed-use development on sites with existing retail:

1. In situations where retail sites are being redeveloped / intensified for mixed-use developments and less retail commercial space is proposed than currently exists, a commercial needs justification study should be provided to ensure the future on-site population and surrounding neighbourhoods are adequately served.
2. In Downtown Milton and Milton Uptown, in addition to the above requirements, the commercial needs justification study should be provided to ensure the primary shopping destination in the Town is not diminished. Furthermore, additional consideration should be given to ensuring the resulting development considers the success factors attributed to Downtown Milton and Milton Uptown including building facades, parking & accessibility and door spacing amongst others.

New mixed-use development on sites with no retail but located within a Strategic Growth Area:

3. For infill and/or redevelopment sites that do not have any existing commercial space, the Town should consider a requirement to provide a minimum level of ground floor non-residential space (excluding condominium / amenity space). This minimum could be based on a ground floor space index, such as a minimum percentage of ground floor area dedicated to non-residential uses. This minimum could augment the existing requirement for ground floor retail or active frontages on buildings facing arterial and collector streets.

Where policies require a certain amount or percentage of non-residential to be built as part of the development, interim development to allow the mix of uses to evolve over time through phasing plans should be considered.

However, it is noted that not all sites are appropriate for ground floor non-residential uses. If no non-residential space is proposed, a commercial needs justification study should be provided to ensure the lack of ground floor non-residential space will not adversely impact the planned function of site and surrounding area, from a commercial perspective.

Minimum non-residential gross floor area requirements could also be considered in implementing documents to allow for flexibility and the recognition of site-specific attributes.

7.2 Policy Direction 2: Future retail space needs to be encouraged

As stated in this report, Milton is underserved with respect to retail commercial space. Therefore, policies should be considered that protect existing retail commercial space so not to exasperate the situation as well as policies that encourage new retail commercial development.

It is recognized that, in many cases, residential development is more profitable than retail commercial uses. It is also recognized that development will not occur if it is not considered profitable by the developer. Although incentives are not necessarily official plan policy oriented, the Town may consider incentives to make retail commercial development more economically feasible. Some incentives could include:

4. Reduction or reallocation of parking / loading requirements in specific instances and circumstances, where underutilized residential / visitor parking can be used for commercial purpose. It is also important to note that changes in transit and autonomous vehicle technology may impact the requirements for the number of parking spaces and / or electric vehicle charging stations.
5. When considering amendments to building height and / or floor space indices, include a requirement for retail commercial space commensurate with the additional building height and density proposed.

There is an opportunity to tie future retail development to social benefits and healthy communities.

6. Consider policy on the benefits of ground floor retail, specifically supporting the local (neighbourhood and community) economy in terms of small and local enterprises.
7. Consider policy on the benefits of a range of retail space across the affordability spectrum that will allow for local entrepreneurialism.
8. Consider policy on the benefits of a range of retail uses that are reflective of diverse consumer desires and needs.
9. Consider policy on non-traditional retail commercial such as pop-up markets, micro-enterprise space and mobile retail.

Through the consultation process, retailers have stated that they are not considering locations in mixed-use buildings in Milton. However, land costs have been raised as an impediment to delivering traditional retail commercial developments (i.e. non-mixed-use). One of the challenges is that most commercial permissions are within mixed-use designations and therefore land costs are elevated due to the assumption of high-density development on the land costs.

10. Set minimum commercial floorspace requirements for inclusion in specific land use designations with the goal of ensuring that development land values do not escalate to the exclusion of retail commercial development
11. Consider policies which require commercial in mixed-use designations and can proceed without residential with residential to follow in later phases

7.3 Policy Direction 3: What types and format of stores should be accommodated?

Defining certain types of retailers for specific geographies is practical. As an example, supermarkets and food stores are important components of neighbourhoods. However, it is not particularly relevant for other retailers and service providers based on the retail environment which is changing due to e-commerce and a blurring of retail channels. An example of this blurring of retail channels is pharmacies and dollar stores selling significant amount of food.

12. Access to food stores, particularly supermarkets, has been and continues to be the cornerstone of neighbourhood retail development. Consideration should be given to encourage that master planned mixed-use communities typically found within Strategic Growth Areas with between 5,000 to 8,000 persons (2,600 to 4,400 units assuming a ppu of 1.9) should provide the opportunity to accommodate a small-scale food store. Larger communities and secondary plans with over 8,000 persons (2,500 units assuming a ppu of 3.2) should be planned to accommodate a supermarket.
13. The retail development industry favours chain retailers and established operators. As Milton's population continues to grow and diversify, access to a wide range of retail unit tenures and types should be made available to future retail entrepreneurs. Segments of the population which may be economically disadvantaged will require assistance to partake in commercial endeavours, in part due to the existing leasing structure evident in most retail commercial projects. Consideration should be given to include policy on the social and economic benefits of a wide range of retail formats.
14. Upper floor retail commercial space, which provides an alternative that can increase retail supply or provide uses such as small business office space, should be encouraged within developments that are in proximity to transit.
15. Accommodation of non-traditional store fronts such as automated convenience stores, food and beverage, pharmacy and delivery lockers should be considered.

Appendix A – Mobility Data

This appendix details the mobility data used as input into parts of the analysis.

TR often examines mobility location data to establish the customer draw of various retail locations. The mobility location data is anonymized, permission-based data collected from location enabled devices. Each smartphone has a Unique Device ID and a Common Evening Location, which represents where each device spends the majority of its time at night and is used as a proxy for place of residence.

In this report, TR examined twelve locations in Milton. TR examined mobility data for a one year period from July 31, 2024 to August 1, 2025 to establish their customer draw:

- Milton Mall
- Milton Power Centres – RioCan Centre and Milton Crossroads
- Milton Supermarkets – Real Canadian Superstore, Sobeys, Metro, FreshCo., Longo's, No Frills, Food Basics and Ethnic Super Market
- Downtown Milton – defined as retail locations on Main St. E. between Bronte St. and Ontario St.

Figure A-1: Milton Customer Draw

Region	Milton Mall	Power Centres ⁽¹⁾	Supermarkets ⁽²⁾	Milton Downtown ⁽³⁾
Milton	69.6%	61.5%	81.4%	68.4%
Halton Hills	3.8%	5.3%	1.8%	2.6%
Oakville	2.2%	2.0%	1.5%	2.6%
Burlington	1.5%	1.3%	1.1%	1.8%
Halton Subtotal	77.2%	70.3%	85.8%	75.4%
Mississauga	6.8%	7.4%	3.9%	5.8%
Brampton	2.6%	5.5%	1.6%	3.0%
Caledon	0.2%	0.3%	0.1%	0.2%
Peel Subtotal	9.6%	13.2%	5.6%	9.0%
Toronto	3.0%	4.3%	2.4%	4.3%
King	0.0%	0.0%	0.0%	0.1%
Markham	0.2%	0.4%	0.1%	0.3%
Newmarket	0.0%	0.1%	0.0%	0.1%
Richmond Hill	0.1%	0.2%	0.1%	0.2%
Vaughan	0.4%	0.5%	0.3%	0.5%
Whitchurch-Stouffville	0.0%	0.0%	0.0%	0.1%
York Subtotal	1.0%	1.3%	0.7%	1.3%
Ajax	0.1%	0.1%	0.1%	0.1%
Oshawa	0.1%	0.1%	0.1%	0.1%
Pickering	0.1%	0.1%	0.0%	0.1%
Whitby	0.1%	0.1%	0.0%	0.1%
Durham Subtotal	0.4%	0.5%	0.3%	0.4%
Outside of GTA	9.9%	11.7%	6.1%	11.0%
Grand Total	100%	100%	100%	100%

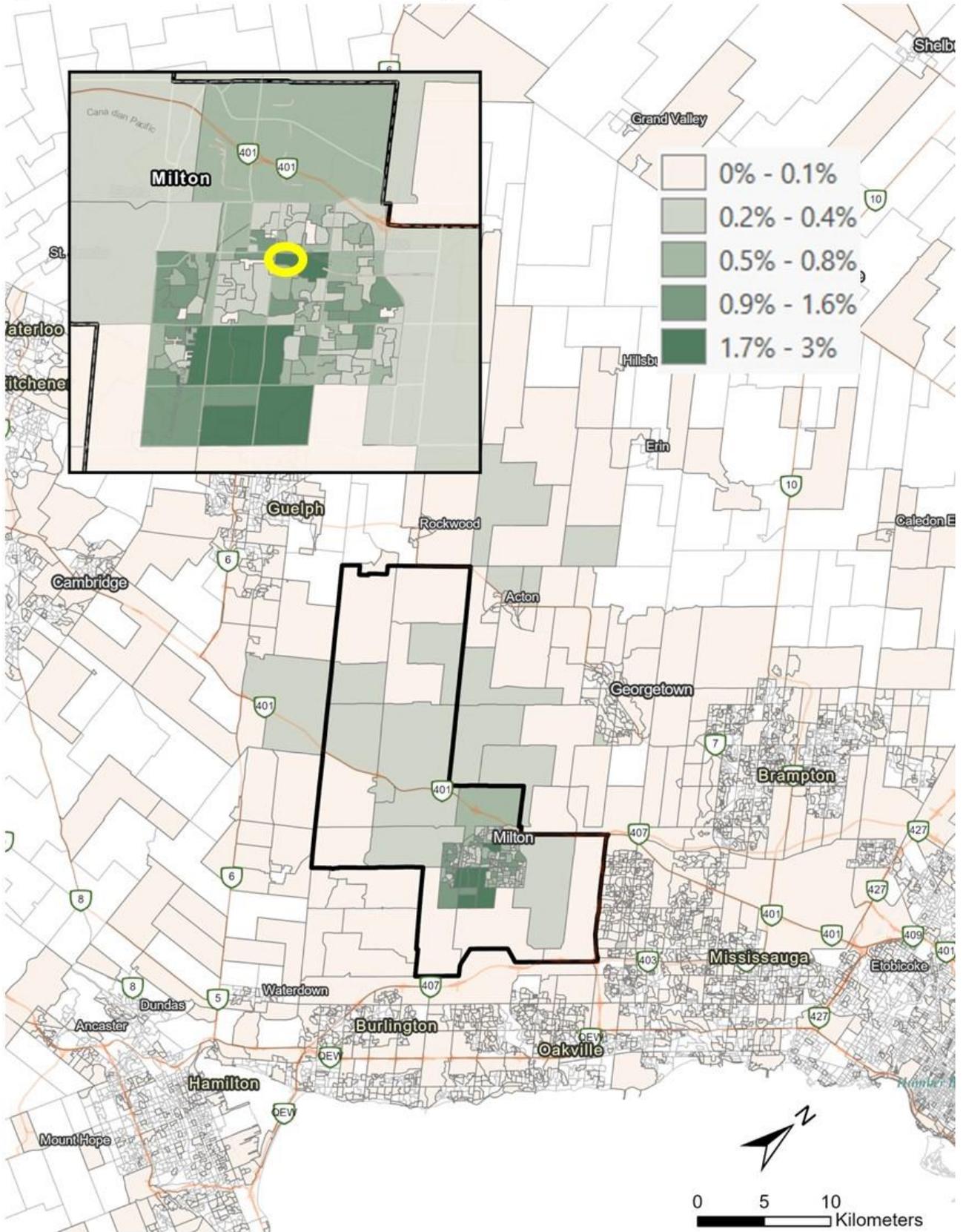
Source: Tate Research; based on Azira Mobility Data, 07/31/24 to 08/01/25

¹⁾ Milton Power Centres includes RioCan Centre and Milton Crossroads

²⁾ Milton Supermarkets includes: Real Canadian Superstore, Sobeys, Metro, FreshCo, Longo's, No Frills, Food Basics and Ethnic Supermarket

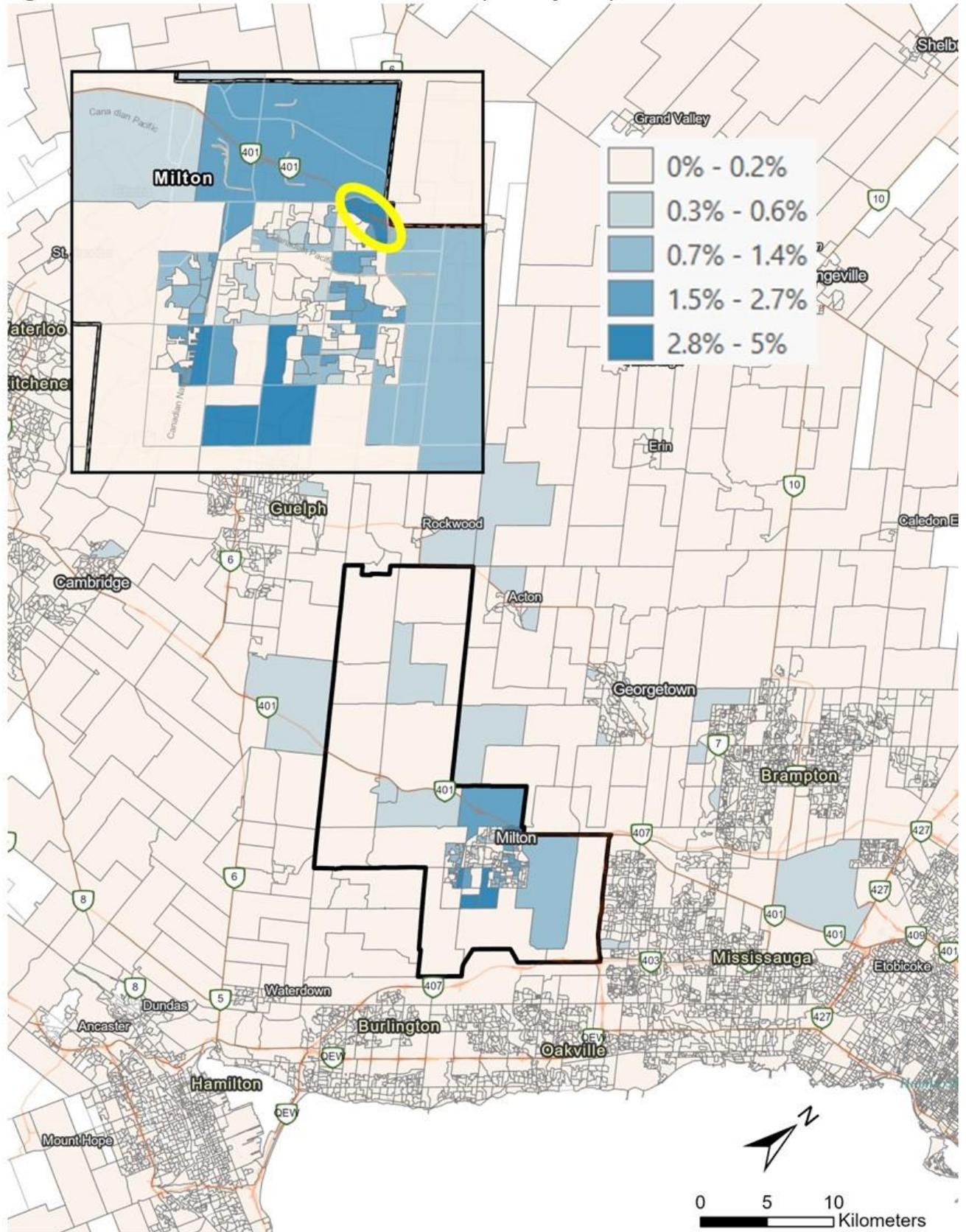
³⁾ Downtown Milton is defined as retail locations on Main St. E., East of Bronte St. and west of Ontario St.

Figure A-2: Milton Mall Customer Draw (mobility data)



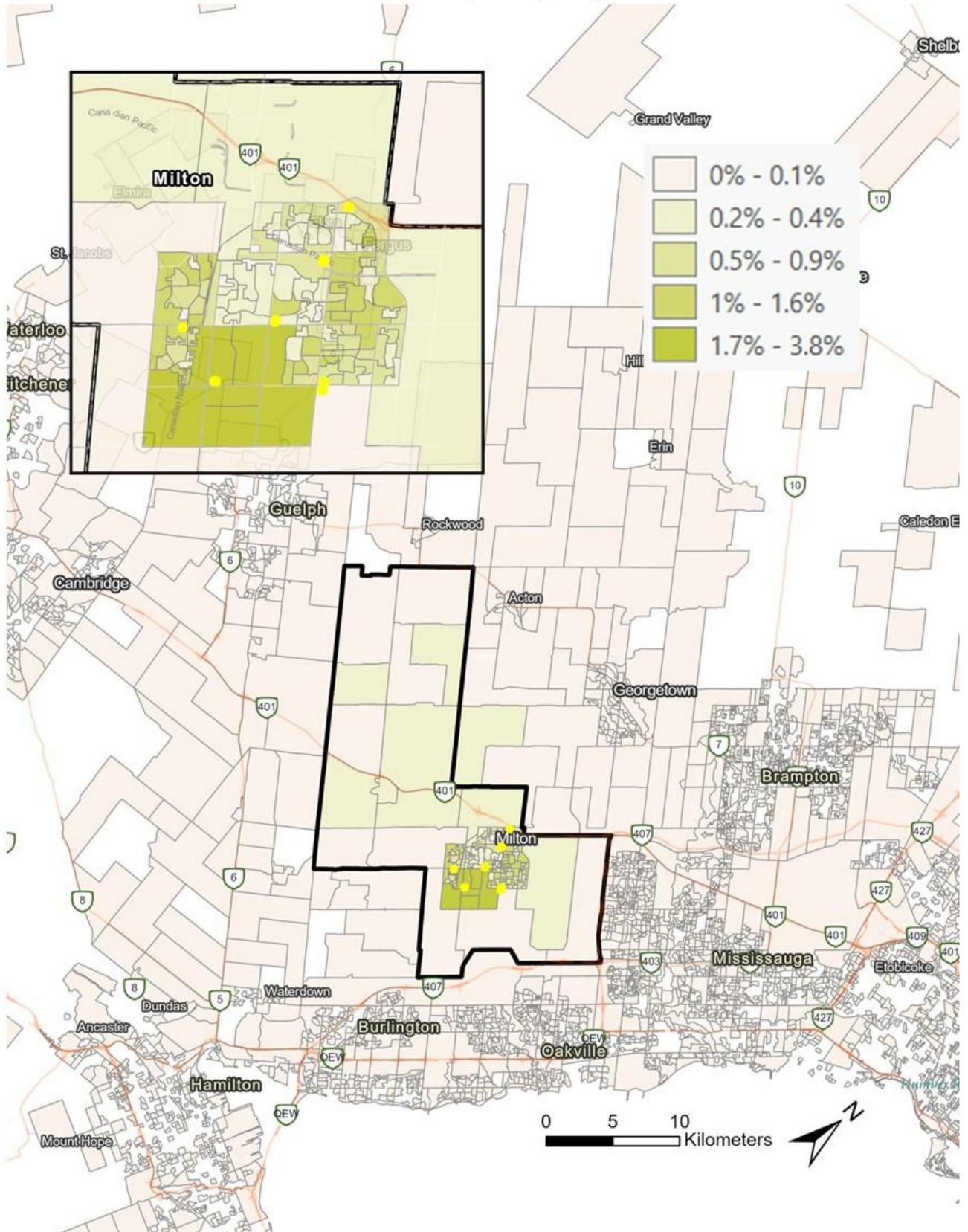
Source: Tate Research; based on Azira Mobility Data, 07/31/24 to 08/01/25

Figure A-3: Milton Power Centres Customer Draw (mobility data)



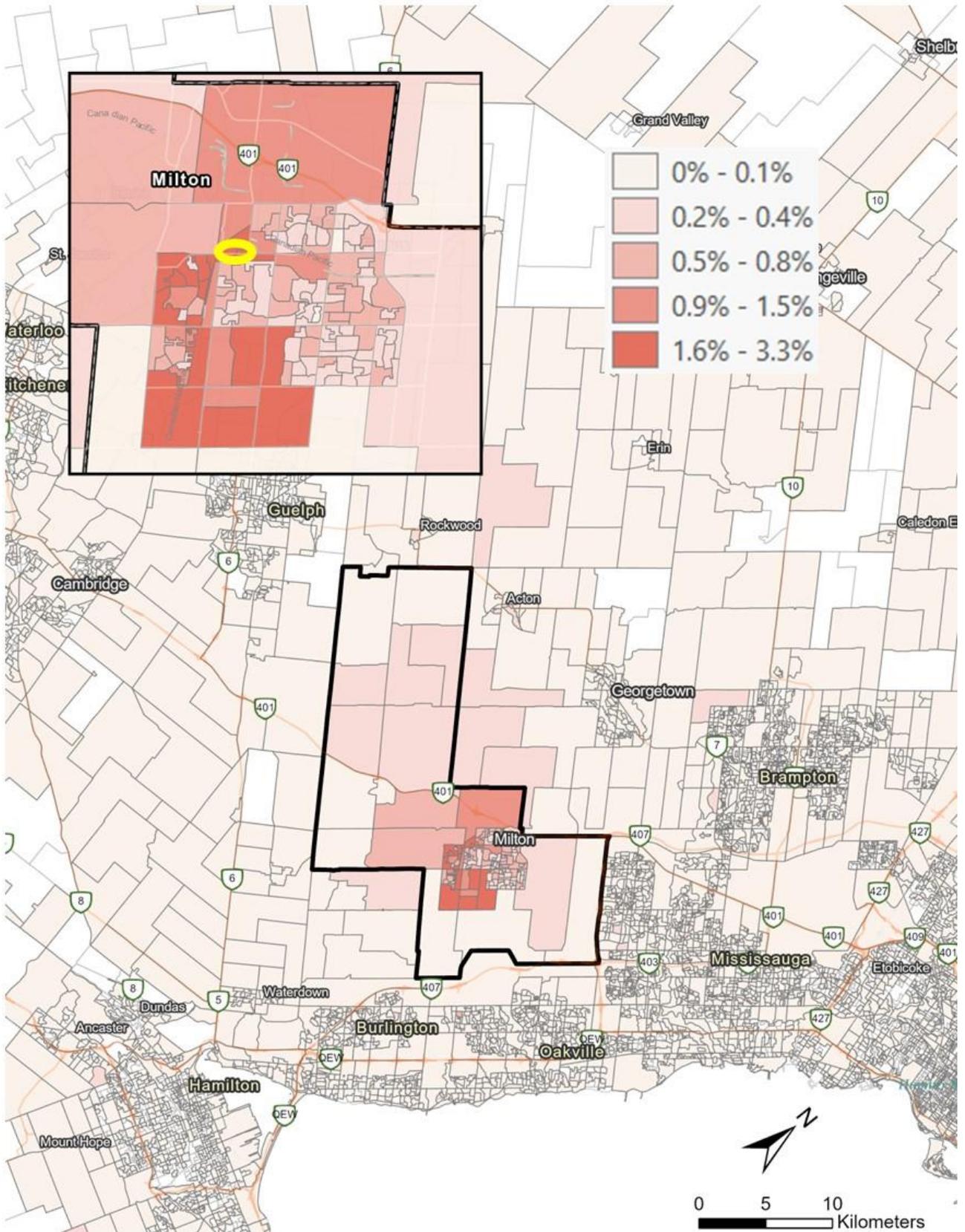
Source: Tate Research; based on Azira Mobility Data, 07/31/24 to 08/01/25

Figure A-4: Milton Supermarkets Customer Draw (mobility data)



Source: Tate Research; based on Azira Mobility Data, 07/31/24 to 08/01/25

Figure A-5: Downtown Milton Customer Draw (mobility data)



Source: Tate Research; based on Azira Mobility Data, 07/31/24 to 08/01/25

Appendix B – Background Analysis Tables

This appendix contains the analysis tables referenced in the main report.

Figure B-1: 2024 Study Area Per Capita Income Indices

	Total Income (\$Millions)	2024 Total Population	Per Capita Income	Index to the Province
Milton	\$7,360	154,574	\$47,615	95.8
Ontario	\$789,000	15,871,995	\$49,710	100.0

Source: Tate Research.

¹⁾ Based on population and income data obtained from the Environics Analytics 2024 DemoStats.**Figure B-2 Per Capita NFBR Expenditure Estimates 2025**

Non-Food & Beverage Retail	2025		
	Total Retail Sales (\$ M)	Per Capita	Distribution
Automotive	\$5,040	\$312	3.4%
Furniture, Home Furnishings and Electronics	\$21,763	\$1,345	14.5%
Building and Outdoor Home Supplies Stores	\$15,680	\$969	10.4%
Pharmacies and Personal Care Stores	\$26,153	\$1,617	17.4%
Clothing and Accessories Stores	\$19,118	\$1,182	12.7%
General Merchandise Stores	\$44,996	\$2,781	29.9%
Miscellaneous Retailers	\$17,502	\$1,082	11.6%
Total NFBR Expenditures	\$150,251.2	\$9,288	100.0%

Non-Food & Beverage Retail	2025 E- Commerce Adjustment	E-Commerce Omni-Channel Sales (\$ M)	Per Capita	Distribution
Automotive	18.6%	\$937	\$58	4.2%
Furniture, Home Furnishings and Electronics	25.9%	\$5,642	\$349	25.1%
Building and Outdoor Home Supplies Stores	11.2%	\$1,750	\$108	7.8%
Pharmacies and Personal Care Stores	11.4%	\$2,994	\$185	13.3%
Clothing and Accessories Stores	25.0%	\$4,776	\$295	21.2%
General Merchandise Stores	7.2%	\$3,253	\$201	14.4%
Miscellaneous Retailers	18.1%	\$3,164	\$196	14.1%
Total NFBR Expenditures	15.0%	\$22,515	\$1,392	100.1%

Ontario - Estimated 2025 Population

16,176,977

Source: Tate Research.

¹⁾ Based on Q1-Q2 2025 retail sales by NAICS category provided by Statistics Canada, Retail Trade, Table 20-10-0056-01.²⁾ TR estimate based on Statistics Canada Table 20-10-0084-01.³⁾ Statistics Canada, Table 17-10-0009-01

Figure B-3 Per Capita FBR Expenditure Estimates, 2025

Food & Beverage Retail Categories	2025			
	Total Retail Sales (\$ M)	Per Capita	Distribution	
Supermarkets	38,943	\$2,407	68.9%	
Convenience Stores	2,742	\$170	4.9%	
Specialty Food Stores	4,581	\$283	8.1%	
Beer, Wine and Liquor Stores	10,290	\$636	18.2%	
Total FBR Expenditures	\$56,555.9	\$3,496	100.0%	
Food & Beverage Retail Categories	2025 E-Commerce Adjustment	E-Commerce Omni-Channel Sales (\$ M)	Per Capita	Distribution
Supermarkets	4.5%	\$1,756.4	\$109.0	44.7%
Convenience Stores	0.1%	\$3.2	\$0.0	0.0%
Specialty Food Stores	10.4%	\$475.0	\$29.0	11.9%
Beer, Wine and Liquor Stores	16.7%	\$1,714.8	\$106.0	43.4%
Total FBR Expenditures	7.0%	\$3,949.4	\$244.0	100.0%
Ontario - Estimated 2025 Population		16,176,977		

Source: Tate Research.

¹⁾ Based on Q1-Q2 2025 retail sales by NAICS category provided by Statistics Canada, Retail Trade, Table 20-10-0056-01.

²⁾ TR estimate based on Statistics Canada Table 20-10-0084-01.

³⁾ Statistics Canada, Table 17-10-0009-01

Figure B-4: Milton Food Oriented Retail (FBR) Expenditure Potential

	2025	2031	2036	2041	2046	2051
Province of Ontario - Average Per Capita FBR Expenditures						
Per Capita E-Commerce Store Sales	\$244	7.0%	8.5%	10.0%	11.5%	14.5%
Per Capita Ground Related Sales	\$3,252	93.0%				
Per Capita FBR Expenditures	\$3,496	100.0%				
2025 Dollars	2025	2031	2036	2041	2046	2051
Milton						
Income Index to Province	95.8					
FBR Expenditure Index	99.1					
Per Capita FBR Expenditures	\$3,465	\$3,465	\$3,465	\$3,465	\$3,465	\$3,465
Per Capita E-Commerce Store Sales	\$240	\$294	\$346	\$398	\$450	\$502
Ground Related Expenditure	\$3,225	\$3,171	\$3,119	\$3,067	\$3,015	\$2,963
Population	157,900	245,800	292,000	333,900	370,200	400,400
Total FBR Potential (\$Millions)	\$509.2	\$779.4	\$910.7	\$1,024.1	\$1,116.2	\$1,186.4
Milton						
Supermarket	74.0%	74.5%	74.5%	74.5%	74.5%	74.5%
Specialty Food	12.0%	12.5%	12.5%	12.5%	12.5%	12.5%
Beer, Wine & Liquor	14.0%	13.0%	13.0%	13.0%	13.0%	13.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Milton						
Supermarket (\$Millions)	\$376.8	\$580.7	\$678.5	\$763.0	\$831.6	\$883.9
Specialty Food (\$Millions)	\$61.1	\$97.4	\$113.8	\$128.0	\$139.5	\$148.3
Beer, Wine & Liquor (\$Millions)	\$71.3	\$101.3	\$118.4	\$133.1	\$145.1	\$154.2
Total	\$509.2	\$779.4	\$910.7	\$1,024.1	\$1,116.2	\$1,186.4
TOTAL TOWN OF MILTON						
Total FBR Potential (\$Millions)	\$509.2	\$779.4	\$910.7	\$1,024.1	\$1,116.2	\$1,186.4

Source: Tate Research.

Figure B-5: Milton Non Food & Beverage Retail (NFBR) Expenditure Potential

		2025	2031	2036	2041	2046	2051
Province of Ontario - Average Per Capita NFBR Expenditures							
Per Capita E-Commerce Store Sales	\$1,392	15.0%	18.5%	21.0%	23.5%	26.0%	28.5%
Per Capita Ground Related Sales	\$7,896	85.0%					
Per Capita NFBR Expenditures	\$9,288	100%					
2025 Dollars							
		2025	2031	2036	2041	2046	2051
Milton							
Income Index to Province		95.8					
NFBR Expenditure Index		99.4					
Per Capita NFBR Expenditures		\$9,230	\$9,505	\$9,740	\$9,970	\$10,200	\$10,430
E-Com		\$1,385	\$1,757	\$2,044	\$2,342	\$2,651	\$2,971
Per Capita NFBR Expenditures		\$7,845	\$7,748	\$7,696	\$7,628	\$7,549	\$7,459
Population		157,900	245,800	292,000	333,900	370,200	400,400
Total NFBR Potential		\$1,238.7	\$1,904.5	\$2,247.2	\$2,547.0	\$2,794.6	\$2,986.6
Milton							
Automotive		2.0%	2.0%	2.0%	2.0%	2.0%	2.0%
Furniture, Home Furnishings & Electronics		11.0%	11.0%	11.0%	11.0%	11.0%	11.0%
Building & Outdoor Home Supplies Stores		14.0%	14.0%	14.0%	14.0%	14.0%	14.0%
Pharmacies & Personal Care Stores		18.9%	18.9%	18.9%	18.9%	18.9%	18.9%
Clothing & Accessories Stores		11.8%	11.8%	11.8%	11.8%	11.8%	11.8%
General Merchandise Stores		28.1%	28.1%	28.1%	28.1%	28.1%	28.1%
Miscellaneous Retailers		14.2%	14.2%	14.2%	14.2%	14.2%	14.2%
Total		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Milton							
Automotive		\$24.8	\$38.1	\$44.9	\$50.9	\$55.9	\$59.7
Furniture, Home Furnishings & Electronics		\$136.3	\$209.5	\$247.2	\$280.2	\$307.4	\$328.5
Building & Outdoor Home Supplies Stores		\$173.4	\$266.6	\$314.6	\$356.6	\$391.2	\$418.1
Pharmacies & Personal Care Stores		\$234.1	\$360.0	\$424.7	\$481.4	\$528.2	\$564.5
Clothing & Accessories Stores		\$146.2	\$224.7	\$265.2	\$300.5	\$329.8	\$352.4
General Merchandise Stores		\$348.1	\$535.2	\$631.5	\$715.7	\$785.3	\$839.2
Miscellaneous Retailers		\$175.9	\$270.4	\$319.1	\$361.7	\$396.8	\$424.1
Total		\$1,238.8	\$1,904.5	\$2,247.2	\$2,547.0	\$2,794.6	\$2,986.6
Total Town of Milton							
Total NFBR Potential (\$ Millions)		\$1,238.7	\$1,904.5	\$2,247.2	\$2,547.0	\$2,794.6	\$2,986.6

Source: Tate Research.

Figure B-6: Supermarket Market Demand Analysis

2025 Dollars	2025	2031	2036	2041	2046	2051
Milton						
FBR Expenditure Potential	\$509.2	\$779.4	\$910.7	\$1,024.1	\$1,116.2	\$1,186.4
Supermarket Share %	74.0%	74.5%	74.5%	74.5%	74.5%	74.5%
Supermarket Share \$	\$376.8	\$580.7	\$678.5	\$763.0	\$831.6	\$883.9
Milton Share %	80.0%	80.0%	80.0%	80.0%	80.0%	80.0%
Milton Share \$	\$301.4	\$464.6	\$542.8	\$610.4	\$665.3	\$707.1
Existing SPSF (including inflow)	\$867					
<i>Supermarket Space</i>	409,400					
<i>Inflow %</i>	15%					
<i>Inflow \$</i>	\$53.6					
<i>Total Sales</i>	\$355.0					
Residual Potential	\$0.0	\$163.2	\$241.4	\$309.0	\$363.9	\$405.7
Inflow %		14.0%	13.0%	12.0%	11.0%	10.0%
Inflow \$		\$26.6	\$36.1	\$42.1	\$45.0	\$45.1
Total Milton Residual Supermarket Sales Volume		\$189.8	\$277.5	\$351.1	\$408.9	\$450.8
Warranted Supermarket Space @ \$950 per Sq. Ft.		199,800	292,100	369,600	430,400	474,500
Warranted Supermarket Space @ \$1000 per Sq. Ft.		189,800	277,500	351,100	408,900	450,800
Warranted Supermarket Space @ \$1050 per Sq. Ft.		180,800	264,300	334,400	389,400	429,300
Warranted Supermarket Space @ \$1100 per Sq. Ft.		172,500	252,300	319,200	371,700	409,800
Warranted Supermarket Space @ \$1150 per Sq. Ft.		165,000	241,300	305,300	355,600	392,000

Source: Tate Research.

Figure B-7: Specialty Food Market Demand Analysis

2025 Dollars	2025	2031	2036	2041	2046	2051
Milton						
FBR Expenditure Potential	\$509.2	\$779.4	\$910.7	\$1,024.1	\$1,116.2	\$1,186.4
Specialty Food Share %	12.0%	12.5%	12.5%	12.5%	12.5%	12.5%
Specialty Food Share \$	\$61.1	\$97.4	\$113.8	\$128.0	\$139.5	\$148.3
Milton Share %	60.0%	60.0%	60.0%	60.0%	60.0%	60.0%
Milton Share \$	\$36.7	\$58.4	\$68.3	\$76.8	\$83.7	\$89.0
Existing SPSF (including inflow)	\$352					
<i>Specialty Food Space</i>	116,500					
<i>Inflow %</i>	10%					
<i>Inflow \$</i>	\$4.3					
<i>Total Sales</i>	\$41.0					
Residual Potential	\$0.0	\$21.7	\$31.6	\$40.1	\$47.0	\$52.3
Inflow %		9.0%	8.0%	7.0%	6.0%	5.0%
Inflow \$		\$2.1	\$2.7	\$3.0	\$3.0	\$2.8
Total Milton Residual Specialty Food Sales Volume		\$23.8	\$34.3	\$43.1	\$50.0	\$55.1
Warranted Specialty Food Space @ \$500 per Sq. Ft.		47,600	68,600	86,200	100,000	110,200
Warranted Specialty Food Space @ \$550 per Sq. Ft.		43,300	62,400	78,400	90,900	100,200
Warranted Specialty Food Space @ \$600 per Sq. Ft.		39,700	57,200	71,800	83,300	91,800
Warranted Specialty Food Space @ \$650 per Sq. Ft.		36,600	52,800	66,300	76,900	84,800
Warranted Specialty Food Space @ \$700 per Sq. Ft.		34,000	49,000	61,600	71,400	78,700

Source: Tate Research.

Figure B-8: Beer, Wine & Liquor Market Demand Analysis

2025 Dollars	2025	2031	2036	2041	2046	2051
Milton						
FBR Expenditure Potential	\$509.2	\$779.4	\$910.7	\$1,024.1	\$1,116.2	\$1,186.4
BWL Share %	14.0%	14.0%	14.0%	14.0%	14.0%	14.0%
BWL Share \$	\$71.3	\$109.1	\$127.5	\$143.4	\$156.3	\$166.1
Milton Share %	75.0%	75.0%	75.0%	75.0%	75.0%	75.0%
Milton Share \$	\$53.5	\$81.8	\$95.6	\$107.6	\$117.2	\$124.6
Existing SPSF (including inflow)	\$1,285					
<i>BWL Space</i>	45,900					
<i>Inflow %</i>	10%					
<i>Inflow \$</i>	\$5.5					
<i>Total Sales</i>	\$59.0					
Residual Potential	\$0.0	\$28.3	\$42.1	\$54.1	\$63.7	\$71.1
Inflow %		9.0%	8.0%	7.0%	6.0%	5.0%
Inflow \$		\$2.8	\$3.7	\$4.1	\$4.1	\$3.7
Total Milton Residual BWL Sales Volume		\$31.1	\$45.8	\$58.2	\$67.8	\$74.8
Warranted BWL Space @ \$1200 per Sq. Ft.		25,900	38,200	48,500	56,500	62,300
Warranted BWL Space @ \$1250 per Sq. Ft.		24,900	36,600	46,600	54,200	59,800
Warranted BWL Space @ \$1300 per Sq. Ft.		23,900	35,200	44,800	52,200	57,500
Warranted BWL Space @ \$1350 per Sq. Ft.		23,000	33,900	43,100	50,200	55,400
Warranted BWL Space @ \$1400 per Sq. Ft.		22,200	32,700	41,600	48,400	53,400

Source: Tate Research.

Figure B-9: Automotive Market Demand Analysis

2025 Dollars	2025	2031	2036	2041	2046	2051
Milton						
NFBR Expenditure Potential	\$1,238.7	\$1,904.5	\$2,247.2	\$2,547.0	\$2,794.6	\$2,986.6
Automotive Share %	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%
Automotive Share \$	\$24.8	\$38.1	\$44.9	\$50.9	\$55.9	\$59.7
Milton Share %	65.0%	65.0%	65.0%	65.0%	65.0%	65.0%
Milton Share \$	\$16.1	\$24.8	\$29.2	\$33.1	\$36.3	\$38.8
Existing SPSF (including inflow)	\$284					
<i>Automotive Space</i>	62,900					
<i>Inflow %</i>	10%					
<i>Inflow \$</i>	\$1.8					
<i>Total Sales</i>	\$17.9					
Residual Potential	\$0.0	\$8.7	\$13.1	\$17.0	\$20.2	\$22.7
Inflow %		9.0%	8.0%	7.0%	6.0%	5.0%
Inflow \$		\$0.9	\$1.1	\$1.3	\$1.3	\$1.2
Total Milton Residual Automotive Sales Volume		\$9.6	\$14.2	\$18.3	\$21.5	\$23.9
Warranted Automotive Space @ \$350 per Sq. Ft.		27,400	40,600	52,300	61,400	68,300
Warranted Automotive Space @ \$400 per Sq. Ft.		24,000	35,500	45,800	53,800	59,800
Warranted Automotive Space @ \$450 per Sq. Ft.		21,300	31,600	40,700	47,800	53,100
Warranted Automotive Space @ \$500 per Sq. Ft.		19,200	28,400	36,600	43,000	47,800
Warranted Automotive Space @ \$550 per Sq. Ft.		17,500	25,800	33,300	39,100	43,500

Source: Tate Research.

Figure B-10: Furnishings, Home Furnishings & Electronics Market Demand Analysis

2025 Dollars	2025	2031	2036	2041	2046	2051
Milton						
NFBR Expenditure Potential	\$1,238.7	\$1,904.5	\$2,247.2	\$2,547.0	\$2,794.6	\$2,986.6
Furnishings, Home Furnishings & Electronics Share %	11.0%	11.0%	11.0%	11.0%	11.0%	11.0%
Furnishings, Home Furnishings & Electronics Share \$	\$136.3	\$209.5	\$247.2	\$280.2	\$307.4	\$328.5
Milton Share %	60.0%	60.0%	60.0%	60.0%	60.0%	60.0%
Milton Share \$	\$81.8	\$125.7	\$148.3	\$168.1	\$184.4	\$197.1
Existing SPSF (including inflow)	\$622					
<i>Furnishings, Home Furnishings & Electronics Space</i>	146,100					
<i>Inflow %</i>	10%					
<i>Inflow \$</i>	\$9.1					
<i>Total Sales</i>	\$90.9					
Residual Potential	\$0.0	\$43.9	\$66.5	\$86.3	\$102.6	\$115.3
Inflow %		9.0%	8.0%	7.0%	6.0%	5.0%
Inflow \$		\$4.3	\$5.8	\$6.5	\$6.5	\$6.1
Total Milton Residual Furnishings, Home Furnishings & Electronics Sales Volume		\$48.2	\$72.3	\$92.8	\$109.1	\$121.4
Warranted Furnishings, Home Furnishings & Electronics Space @ \$550 per Sq. Ft.		87,600	131,500	168,700	198,400	220,700
Warranted Furnishings, Home Furnishings & Electronics Space @ \$600 per Sq. Ft.		80,300	120,500	154,700	181,800	202,300
Warranted Furnishings, Home Furnishings & Electronics Space @ \$650 per Sq. Ft.		74,200	111,200	142,800	167,800	186,800
Warranted Furnishings, Home Furnishings & Electronics Space @ \$700 per Sq. Ft.		68,900	103,300	132,600	155,900	173,400
Warranted Furnishings, Home Furnishings & Electronics Space @ \$750 per Sq. Ft.		64,300	96,400	123,700	145,500	161,900

Source: Tate Research.

Figure B-11: Building & Outdoor Home Supplies Market Demand Analysis

2025 Dollars	2025	2031	2036	2041	2046	2051
Milton						
NFBR Expenditure Potential	\$1,238.7	\$1,904.5	\$2,247.2	\$2,547.0	\$2,794.6	\$2,986.6
Building & Outdoor Home Supplies Stores Share %	14.0%	14.0%	14.0%	14.0%	14.0%	14.0%
Building & Outdoor Home Supplies Stores Share \$	\$173.4	\$266.6	\$314.6	\$356.6	\$391.2	\$418.1
Milton Share %	80.0%	80.0%	80.0%	80.0%	80.0%	80.0%
Milton Share \$	\$138.7	\$213.3	\$251.7	\$285.3	\$313.0	\$334.5
Existing SPSF (including inflow)	\$415					
<i>Building & Outdoor Home Supplies Stores Space</i>	371,500					
<i>Inflow %</i>	10%					
<i>Inflow \$</i>	\$15.4					
<i>Total Sales</i>	\$154.1					
Residual Potential	\$0.0	\$74.6	\$113.0	\$146.6	\$174.3	\$195.8
Inflow %		9.0%	8.0%	7.0%	6.0%	5.0%
Inflow \$		\$7.4	\$9.8	\$11.0	\$11.1	\$10.3
Total Milton Residual Building & Outdoor Home Supplies Stores Sales Volume		\$82.0	\$122.8	\$157.6	\$185.4	\$206.1
Warranted Building & Outdoor Home Supplies Stores Space @ \$550 per Sq. Ft.		149,100	223,300	286,500	337,100	374,700
Warranted Building & Outdoor Home Supplies Stores Space @ \$600 per Sq. Ft.		136,700	204,700	262,700	309,000	343,500
Warranted Building & Outdoor Home Supplies Stores Space @ \$650 per Sq. Ft.		126,200	188,900	242,500	285,200	317,100
Warranted Building & Outdoor Home Supplies Stores Space @ \$700 per Sq. Ft.		117,100	175,400	225,100	264,900	294,400
Warranted Building & Outdoor Home Supplies Stores Space @ \$750 per Sq. Ft.		109,300	163,700	210,100	247,200	274,800

Source: Tate Research.

Figure B-12: Pharmacies & Personal Care Stores Market Demand Analysis

2025 Dollars	2025	2031	2036	2041	2046	2051
Milton						
NFBR Expenditure Potential	\$1,238.7	\$1,904.5	\$2,247.2	\$2,547.0	\$2,794.6	\$2,986.6
Pharmacies & Personal Care Stores Share %	18.9%	18.9%	18.9%	18.9%	18.9%	18.9%
Pharmacies & Personal Care Stores Share \$	\$234.1	\$360.0	\$424.7	\$481.4	\$528.2	\$564.5
Milton Share %	80.0%	80.0%	80.0%	80.0%	80.0%	80.0%
Milton Share \$	\$187.3	\$288.0	\$339.8	\$385.1	\$422.6	\$451.6
Existing SPSF (including inflow)	\$1,246					
<i>Pharmacies & Personal Care Stores Space</i>	167,000					
<i>Inflow %</i>	10%					
<i>Inflow \$</i>	\$20.8					
<i>Total Sales</i>	\$208.1					
Residual Potential	\$0.0	\$100.7	\$152.5	\$197.8	\$235.3	\$264.3
Inflow %		9.0%	8.0%	7.0%	6.0%	5.0%
Inflow \$		\$10.0	\$13.3	\$14.9	\$15.0	\$13.9
Total Milton Residual Pharmacies & Personal Care Stores Sales Volume		\$110.7	\$165.8	\$212.7	\$250.3	\$278.2
Warranted Pharmacies & Personal Care Stores Space @ \$1000 per Sq. Ft.		110,700	165,800	212,700	250,300	278,200
Warranted Pharmacies & Personal Care Stores Space @ \$1050 per Sq. Ft.		105,400	157,900	202,600	238,400	265,000
Warranted Pharmacies & Personal Care Stores Space @ \$1100 per Sq. Ft.		100,600	150,700	193,400	227,500	252,900
Warranted Pharmacies & Personal Care Stores Space @ \$1150 per Sq. Ft.		96,300	144,200	185,000	217,700	241,900
Warranted Pharmacies & Personal Care Stores Space @ \$1200 per Sq. Ft.		92,300	138,200	177,300	208,600	231,800

Source: Tate Research.

Figure B-13: Clothing & Accessories Stores Market Demand Analysis

2025 Dollars	2025	2031	2036	2041	2046	2051
Milton						
NFBR Expenditure Potential	\$1,238.7	\$1,904.5	\$2,247.2	\$2,547.0	\$2,794.6	\$2,986.6
Clothing & Accessories Stores Share %	11.8%	11.8%	11.8%	11.8%	11.8%	11.8%
Clothing & Accessories Stores Share \$	\$146.2	\$224.7	\$265.2	\$300.5	\$329.8	\$352.4
Milton Share %	30.0%	35.0%	35.0%	35.0%	35.0%	35.0%
Milton Share \$	\$43.9	\$78.6	\$92.8	\$105.2	\$115.4	\$123.3
Existing SPSF (including inflow)	\$389					
<i>Clothing & Accessories Stores Space</i>	125,400					
<i>Inflow %</i>	10%					
<i>Inflow \$</i>	\$4.9					
<i>Total Sales</i>	\$48.8					
Residual Potential	\$0.0	\$34.7	\$48.9	\$61.3	\$71.5	\$79.4
Inflow %		15.0%	15.0%	15.0%	15.0%	15.0%
Inflow \$		\$6.1	\$8.6	\$10.8	\$12.6	\$14.0
Total Milton Residual Clothing & Accessories Stores Sales Volume		\$40.8	\$57.5	\$72.1	\$84.1	\$93.4
Warranted Clothing & Accessories Stores Space @ \$450 per Sq. Ft.		90,700	127,800	160,200	186,900	207,600
Warranted Clothing & Accessories Stores Space @ \$500 per Sq. Ft.		81,600	115,000	144,200	168,200	186,800
Warranted Clothing & Accessories Stores Space @ \$550 per Sq. Ft.		74,200	104,500	131,100	152,900	169,800
Warranted Clothing & Accessories Stores Space @ \$600 per Sq. Ft.		68,000	95,800	120,200	140,200	155,700
Warranted Clothing & Accessories Stores Space @ \$650 per Sq. Ft.		62,800	88,500	110,900	129,400	143,700

Source: Tate Research.

Figure B-14: General Merchandise Stores Market Demand Analysis

2025 Dollars	2025	2031	2036	2041	2046	2051
Milton						
NFBR Expenditure Potential	\$1,238.7	\$1,904.5	\$2,247.2	\$2,547.0	\$2,794.6	\$2,986.6
General Merchandise Stores Share %	28.1%	28.1%	28.1%	28.1%	28.1%	28.1%
General Merchandise Stores Share \$	\$348.1	\$535.2	\$631.5	\$715.7	\$785.3	\$839.2
Milton Share %	65.0%	60.0%	60.0%	60.0%	60.0%	60.0%
Milton Share \$	\$226.3	\$321.1	\$378.9	\$429.4	\$471.2	\$503.5
Existing SPSF (including inflow)	\$928					
<i>General Merchandise Stores Space</i>	271,000					
<i>Inflow %</i>	10%					
<i>Inflow \$</i>	\$25.1					
<i>Total Sales</i>	\$251.4					
Residual Potential	\$0.0	\$94.8	\$152.6	\$203.1	\$244.9	\$277.2
Inflow %		9.0%	8.0%	7.0%	6.0%	5.0%
Inflow \$		\$9.4	\$13.3	\$15.3	\$15.6	\$14.6
Total Milton Residual General Merchandise Stores Sales Volume		\$104.2	\$165.9	\$218.4	\$260.5	\$291.8
Warranted General Merchandise Stores Space @ \$500 per Sq. Ft.		208,400	331,800	436,800	521,000	583,600
Warranted General Merchandise Stores Space @ \$550 per Sq. Ft.		189,500	301,600	397,100	473,600	530,500
Warranted General Merchandise Stores Space @ \$600 per Sq. Ft.		173,700	276,500	364,000	434,200	486,300
Warranted General Merchandise Stores Space @ \$650 per Sq. Ft.		160,300	255,200	336,000	400,800	448,900
Warranted General Merchandise Stores Space @ \$700 per Sq. Ft.		148,900	237,000	312,000	372,100	416,900

Source: Tate Research.

Figure B-15: Miscellaneous Retailers Market Demand Analysis

2025 Dollars	2025	2031	2036	2041	2046	2051
Milton						
NFBR Expenditure Potential	\$1,238.7	\$1,904.5	\$2,247.2	\$2,547.0	\$2,794.6	\$2,986.6
Miscellaneous Retailers Share %	14.2%	14.2%	14.2%	14.2%	14.2%	14.2%
Miscellaneous Retailers Share \$	\$175.9	\$270.4	\$319.1	\$361.7	\$396.8	\$424.1
Milton Share %	55.0%	55.0%	55.0%	55.0%	55.0%	55.0%
Milton Share \$	\$96.7	\$148.7	\$175.5	\$198.9	\$218.2	\$233.3
Existing SPSF (including inflow)	\$430					
<i>Miscellaneous Retailers Space</i>	264,400					
<i>Inflow %</i>	15%					
<i>Inflow \$</i>	\$17.1					
<i>Total Sales</i>	\$113.8					
Residual Potential	\$0.0	\$52.0	\$78.8	\$102.2	\$121.5	\$136.6
Inflow %		14.0%	13.0%	12.0%	11.0%	10.0%
Inflow \$		\$8.5	\$11.8	\$13.9	\$15.0	\$15.2
Total Milton Residual Miscellaneous Retailers Sales Volume		\$60.5	\$90.6	\$116.1	\$136.5	\$151.8
Warranted Miscellaneous Retailers Space @ \$450 per Sq. Ft.		134,400	201,300	258,000	303,300	337,300
Warranted Miscellaneous Retailers Space @ \$500 per Sq. Ft.		121,000	181,200	232,200	273,000	303,600
Warranted Miscellaneous Retailers Space @ \$550 per Sq. Ft.		110,000	164,700	211,100	248,200	276,000
Warranted Miscellaneous Retailers Space @ \$600 per Sq. Ft.		100,800	151,000	193,500	227,500	253,000
Warranted Miscellaneous Retailers Space @ \$650 per Sq. Ft.		93,100	139,400	178,600	210,000	233,500

Source: Tate Research.

Figure B-16: Service Space Warranted Demand Analysis

	Per Capita Sq. Ft.	2025	2031	2036	2041	2046	2051
Food Services & Drinking Places	3.1	2.8	2.5	2.3	2.1	1.9	
Personal Care & Laundry Services	1.1	1	0.9	0.8	0.7	0.6	
Financial, Insurance, Legal & Real Estate Services	1.5	1.4	1.3	1.2	1.1	1	
Health Care & Social Assistance Services	3.0	3.0	3.0	3.0	3.0	3.0	
Entertainment & Recreation Services	2.5	2.3	2.1	1.9	1.7	1.5	
Other Services	2.6	2.3	2.1	1.9	1.7	1.5	
Total	13.8	12.8	11.9	11.1	10.3	9.5	
Population		157,900	245,800	292,000	333,900	370,200	400,400
Population Growth			87,900	134,100	176,000	212,300	242,500
Food Services & Drinking Places			246,100	335,300	404,800	445,800	460,800
Personal Care & Laundry Services			87,900	120,700	140,800	148,600	145,500
Financial, Insurance, Legal & Real Estate Services			123,100	174,300	211,200	233,500	242,500
Health Care & Social Assistance Services			263,700	402,300	528,000	636,900	727,500
Entertainment & Recreation Services			202,200	281,600	334,400	360,900	363,800
Other Services			202,200	281,600	334,400	360,900	363,800
Total Based on New Population Growth			1,125,200	1,595,800	1,953,600	2,186,600	2,303,900
Existing + Potential Future Service Space		2,118,500	3,243,700	3,714,300	4,072,100	4,305,100	4,422,400

Source: Tate Research.

1) Calculated based on 2024 population and inventory levels in the Town of Milton

Figure B-17: NAICS Definitions of NFBR Items**AUTOMOTIVE**

TR	NAICS
91-92	4413 Automotive Parts, Accessories and Tire Retailers This industry group comprises establishments primarily engaged in retailing automotive parts and accessories.

FURNITURE, HOME FURNISHINGS AND ELECTRONICS STORES

TR	NAICS
40-42	4491 Furniture and Home Furnishings Retailers This industry group comprises establishments primarily engaged in retailing new household and office furniture, floor coverings, window treatment and other home furnishings, kitchen and tableware, bedding and linens, lamps and shades, bathroom accessories, and print and picture frames. These establishment may also provide interior decorating services.
43-46	4492 Electronic and Appliance Retailers This industry group comprises establishments primarily engaged in retailing household appliances, home audio and video equipment, audio and video recordings, cameras, computers, and related goods. These establishments may also retail replacement parts and provide repair services.

BUILDING AND OUTDOOR HOME SUPPLIES STORES

TR	NAICS
60-66	444 Building Material and Garden Equipment and Supplies Dealers This subsector comprises establishments primarily engaged in retailing a specialized or general line of building and home improvement materials, lawn and garden equipment and supplies, outdoor power equipment, and nursery and garden products.

PHARMACIES AND PERSONAL CARE STORES

TR	NAICS
50-53	456 Health and Personal Care Retailers This subsector comprises establishments primarily engaged in retailing health and personal care products. Drug stores and pharmacies, cosmetics, beauty supplies and perfume stores, optical goods stores, food (health) supplement stores and health appliance stores are included.

CLOTHING AND ACCESSORIES STORES

TR	NAICS
31-39	458 Clothing, Clothing Accessories, Shoes, Jewelry, Luggage and Leather Goods Retailers This subsector comprises establishments primarily engaged in retailing clothing, clothing accessories, shoes, jewelry, luggage and leather goods.

GENERAL MERCHANDISE STORES

TR	NAICS
21-24	455 General Merchandise Retailers This subsector comprises establishments primarily engaged in retailing a general line of merchandise that may, or may not, include a general line of grocery items.

MISCELLANEOUS RETAILERS

TR	NAICS
70-90	459 Sporting Goods, Hobby, Musical Instrument, Book, and Miscellaneous Retailers This subsector comprises establishments engaged in retailing sporting goods, games and toys, sewing supplies, fabrics, patterns, yarns and other needlework accessories, musical instruments, and books and other reading materials. It is also engaged in retailing a specialized line of merchandise in other types of specialty stores. Florists, office supplies stores, stationery stores, gift, novelty and souvenir stores, used merchandise stores, pet and pet supplies stores, art dealers and manufactured (mobile) home dealers are included.

Source: Tate Research.

¹⁾ NAICS represents the North American Industrial Classification System.

These definitions are provided by Statistics Canada on the website:

<http://www23.statcan.gc.ca/imdb/p3VD.pl?Function=getVD&TVD=380372>

Figure B-18: NAICS Definitions of FBR Items

SUPERMARKETS & GROCERY STORES

TR NAICS

11 4451 Grocery and Convenience Retailers

This industry group comprises establishments primarily engaged in retailing a general line of food products.

CONVENIENCE AND SPECIALTY FOOD STORES

TR NAICS

12-16 4452 Specialty Food Retailers

This industry group comprises establishments primarily engaged in retailing specialized lines of food products.

BEER, WINE & LIQUOR STORES

TR NAICS

95-97 4453 Beer, Wine & Liquor Stores

This industry group comprises establishments primarily engaged in retailing packaged alcoholic beverages, such as beer, wine and liquor.

Source: Tate Research.

¹⁾ NAICS represents the North American Industrial Classification System.

These definitions are provided by Statistics Canada on the website:

<http://www23.statcan.gc.ca/imdb/p3VD.pl?Function=getVD&TVD=380372>

Figure B-19: NAICS Definitions of Service Items**FOOD AND DRINKING PLACES**

TR NAICS

100 7224 Drinking places (alcoholic beverages)

This industry group comprises establishments, known as bars, taverns or drinking places, primarily engaged in preparing and serving alcoholic beverages for immediate consumption. These establishments may also provide limited food services.

101-102 7225 Full-service restaurants and limited service eating places

This industry group comprises establishments primarily engaged in providing food services to patrons who order and are served while seated and pay after eating, or who order or select items at a counter, food bar or cafeteria line (or order by telephone) and pay before eating. This industry group includes drinking places that primarily serve food.

103 72232 Caterers

This industry comprises establishments primarily engaged in providing food services for events, such as graduation parties, wedding receptions and trade shows. These establishments generally have equipment and vehicles to transport meals and snacks to events and to prepare food at the event site. Caterers who own or manage permanent facilities in which they provide event-based food services are also included.

PERSONAL CARE AND LAUNDRY

TR NAICS

110-116 812 Personal and Laundry Services

This subsector comprises establishments primarily engaged in providing personal care services, funeral services, laundry services and other services, such as pet care and photo finishing. Operators of parking facilities are also included.

HEALTH CARE AND SOCIAL ASSISTANCE

TR NAICS

126 621 Ambulatory Health Care Services

This subsector comprises establishments primarily engaged in providing health care services, directly or indirectly, to ambulatory patients. Health practitioners in this subsector provide out-patient services, in which the facilities and equipment are not usually the most significant part of the production process.

127-128 624 Social Assistance

This subsector comprises establishments primarily engaged in providing a wide variety of assistance services directly to their clients. These services do not include residential or accommodation services, except on a short-stay basis.

FINANCIAL, INSURANCE, LEGAL & REAL ESTATE

TR NAICS

129 5221 Depository credit intermediation

This industry group comprises establishments primarily engaged in accepting deposits and lending funds. Deposits are the principal source of funds loaned.

130 5231 Securities and commodity contracts intermediation and brokerage

This industry group comprises establishments primarily engaged in putting capital at risk in the process of underwriting securities issues or in making markets for securities, and acting as intermediaries between buyers and sellers of securities.

131 5239 Other financial investment activities

This industry group comprises establishments, not classified to any other industry group, primarily engaged in managing portfolios of securities and providing investment advice, trust, fiduciary, custody and other investment services.

Source: Tate Research.

¹⁾ NAICS represents the North American Industrial Classification System.

These definitions are provided by Statistics Canada on the website:

<http://www23.statcan.gc.ca/imdb/p3VD.pl?Function=getVD&TV=380372>

Figure B-19 (Continued) NAICS Definitions of Service Items

FINANCIAL, INSURANCE, LEGAL & REAL ESTATE (Continued)

TR	NAICS	
132	524	Insurance Carriers and Related Activities This subsector comprises establishments primarily engaged in underwriting annuities, insurance policies and reinsurance, and the retailing of insurance and the provision of related services to policy holders. Industries are defined in terms of the type of risk being insured against, such as death, loss of employment due to age or disability, and property damage. Establishments that pool risk invest premiums to build up a portfolio of financial assets to be used against future claims. Contributions and premiums are set on the basis of actuarial calculations of probable payouts based on risk factors from experience tables and expected investment returns on reserves.
133	53121	Offices of Real Estate Agents and Brokers This industry group comprises establishments primarily engaged in renting, buying and selling real estate for others, on a fee or commission basis. These establishments assist vendors by advertising and listing properties and conducting open houses for prospective buyers, assist prospective buyers by selecting, visiting and making purchase offers. They may also rent or lease properties on behalf of clients.
133	53132	Offices of Real Estate Appraisers This industry comprises establishments primarily engaged in appraising the value of real estate and preparing appraisal reports for creditors, insurance companies, courts, buyers, sellers or auctioneers.
133	53139	Other Activities Related to Real Estate This industry comprises establishments, not classified to any other industry, primarily engaged in providing real estate related services.
134	5411	Legal Services This industry group comprises establishments engaged in providing legal and paralegal services. Examples of establishments in this industry group are offices of lawyers, offices of notaries and offices of paralegals.
135	5412	Accounting, Tax Preparation, Bookkeeping and Payroll Services This industry group comprises establishments primarily engaged in auditing accounting records; designing accounting systems; preparing financial statements; developing budgets; preparing tax returns; processing payrolls; bookkeeping; and billing.

ENTERTAINMENT AND RECREATION

TR	NAICS	
140	51213	Motion Picture and Video Exhibition This industry comprises establishments primarily engaged in exhibiting motion pictures. Establishments primarily engaged in providing occasional motion picture exhibition services, such as those provided during film festivals, are also included.
140	71111	Theatre Companies and Dinner Theatres This industry comprises establishments primarily engaged in producing live presentations that involve the performances of actors and actresses, opera singers and other vocalists. Included are theatre companies that operate their own facilities, primarily for the staging of their own productions, as well as establishments, known as dinner theatres, engaged in producing live theatrical entertainment and in providing food and beverages for consumption on the premises. Examples of establishments in this industry are theatre companies, opera companies, musical theatre companies, community theatres, multidisciplinary theatres, puppet theatres, mime theatres and comedy troupes.
141	71112	Dance Companies This industry comprises establishments primarily engaged in producing live presentations that involve the performances of dancers. Dance companies that operate their own facilities, primarily for the staging of their own production, are included.
142	71312	Amusement Arcades This industry comprises establishments primarily engaged in operating amusement arcades and parlours.

Source: Tate Research.

¹⁾ NAICS represents the North American Industrial Classification System.

These definitions are provided by Statistics Canada on the website:

<http://www23.statcan.gc.ca/imdb/p3VD.pl?Function=getVD&TVD=380372>

Figure B-19 (Continued) NAICS Definitions of Service Items

ENTERTAINMENT AND RECREATION (Continued)

TR	NAICS	
143	71394	Fitness and Recreational Sports Centres This Canadian industry comprises establishments primarily engaged in operating health clubs and similar facilities featuring exercise and other active physical fitness conditioning, or recreational sports activities, such as swimming, skating or racquet sports.
144	71395	Bowling Centres This industry comprises establishments primarily engaged in operating bowling centres. These establishments often provide food and beverage services.
145	713992	Other Sport Facilities This Canadian industry comprises establishments, not classified to any other Canadian industry, primarily engaged in operating other sport facilities not elsewhere classified.
146	713999	All Other Amusement and Recreation Industries This Canadian industry comprises establishments, not classified to any other Canadian industry, primarily engaged in operating amusement and recreation industries.

OTHER SERVICES

TR	NAICS	
150	49111	Postal Service This industry comprises establishments primarily engaged in operating the postal service. Establishments of the Post Office, other than those primarily engaged in providing courier services, are classified in this industry, as well as establishments that carry on one or more functions of the postal service on a contract basis, except the delivery of mail in bulk.
151	519211	Libraries This Canadian industry comprises establishments primarily engaged in maintaining collections and facilitating the use of such documents (regardless of its physical form and characteristics) as are required to meet the informational, research, educational or recreational needs of their users.
152	54141	Interior Design Services This industry comprises establishments primarily engaged in planning, designing and administering projects in interior spaces to meet the physical and aesthetic needs of people, taking into consideration building codes, health and safety regulations, traffic patterns and floor planning, mechanical and electrical needs, and interior fittings and furniture. Interior designers and interior design consultants work in areas such as hospitality design, health care design, institutional design, commercial and corporate design and residential design. This industry also includes interior decorating consultants engaged exclusively in providing aesthetic services associated with interior spaces.
153	54192	Photographic Services This industry comprises establishments primarily engaged in providing still, video or computer photography services, including the video taping of special events. These establishments may specialize in a particular field of photography, such as aerial photography, commercial and industrial photography, portrait photography and special event photography.
154	56151	Travel Agent This industry comprises establishments primarily engaged in acting as agents for tour operators, transportation companies and accommodation establishments in selling travel, tour and accommodation services to the general public and commercial clients.
155	532111	Passenger Car Rental This Canadian industry comprises establishments primarily engaged in renting passenger cars without drivers, generally for short periods of time.
155	53212	Truck, Utility Trailer and Recreational Vehicle Rental This Canadian industry comprises establishments primarily engaged in renting or leasing trucks, truck tractors, buses, semi-trailers, utility trailers and recreational vehicles (RVs), without drivers.

Source: Tate Research.

¹⁾ NAICS represents the North American Industrial Classification System.

These definitions are provided by Statistics Canada on the website:

<http://www23.statcan.gc.ca/imdb/p3VD.pl?Function=getVD&TVD=380372>

Figure B-19 (Continued) NAICS Definitions of Service Items**OTHER SERVICES (Continued)**

TR	NAICS	
155	5322	<p>Consumer Goods Rental</p> <p>This industry group comprises establishments primarily engaged in renting or leasing personal and household goods. These establishments generally provide short-term rental, although, in some instances, the goods may be leased for longer periods of time. These establishments often operate from a retail-like or store-front facility.</p>
155	5323	<p>General Rental Centres</p> <p>This industry comprises establishments primarily engaged in renting a range of consumer, commercial and industrial equipment. These establishments typically operate from conveniently located facilities in which they maintain inventories of goods and equipment that are rented for short periods of time. The type of equipment that these establishments provide often includes, but is not limited to, contractors' and builders' tools and equipment, home repair tools, lawn and garden equipment, moving equipment and supplies, and party and banquet equipment and supplies.</p>
155	53242	<p>Office Machinery and Equipment Rental and Leasing</p> <p>This industry comprises establishments primarily engaged in renting or leasing office machinery and equipment.</p>
155	53249	<p>Other Commercial and Industrial Machinery and Equipment Rental and Leasing</p> <p>This industry comprises establishments, not classified to any other industry, primarily engaged in renting or leasing commercial and industrial machinery and equipment.</p>
156	8112	<p>Electronic and Precision Equipment Repair and Maintenance</p> <p>This industry group comprises establishments primarily engaged in repairing and maintaining electronic equipment and precision instruments.</p>
156	8114	<p>Personal and Household Goods Repair and Maintenance</p> <p>This industry group comprises establishments primarily engaged in repairing and maintaining personal and household goods, such as home and garden equipment, appliances, furniture, footwear and leather goods, garments, watches, jewellery, musical instruments, bicycles and recreational boats.</p>

Source: Tate Research.

¹⁾ NAICS represents the North American Industrial Classification System.

These definitions are provided by Statistics Canada on the website:

<http://www23.statcan.gc.ca/imdb/p3VD.pl?Function=getVD&TVD=380372>

Appendix C – Supply Side Data

As part of the analysis, TR has accounted for retail commercial development applications or mixed-use development applications with a retail commercial component.

Figure C-1: Town of Milton Development Applications

Year	File Number	Address	PPA	Project Type	Project Type 2	Commercial Footprint (sq.ft)
2018	LOPA-05/18 & Z-07/18	28,60 & 104 Bronte St. N. (Durante)	Bronte-Main-Meritor	LOPA/ZBA	High-Rise Residential Buildings / Commercial	11,431.00
2021	Z-15/21 & SP-02-24	1572, 1582, 1592, 1620, 1612 Chretien Street (NE Britannia and Bronte Street)(Shearling Heights)	Boyne	ZBA / SITE PLAN	High-Rise Residential Buildings / Commercial	9,655.00
2021	LOPA-10/21 & Z-30/21	550 Ontario St. S.	Old Milton West	LOPA/ZBA	Mixed Use - High Rise / Commercial	21,947.00
2023	SP-23-22	700 & 706 Main St. E	Milton UGC / MTSA	SITE PLAN	High-Rise Residential Building	5,425.01
2024	SP-04-24	6096-6110 Regional Rd. 25	Boyne	SITE PLAN	High-Rise Residential Buildings	4,860.98
2024	Pre-Consultation	150 Steeles Ave. E	Bronte-Main-Meritor	ZBLA & LOPA	Mixed Use Node	37,555.25
2024	Pre-submission review	51 James Snow Pky. N	Bristol	SITE PLAN	Commercial	21,387.87
2024	SP-27-22	Milton Meadows - Block 86. Northwest corner of intersection of New Tremaine Rd and No. 3 Side Rd.	Milton Heights	SITE PLAN	Commercial	29,998.99
2024	Pre-Consultation	New Tremaine Rd. @ 3 Side Road	Milton Heights	PRECON	Commercial	16,027.45
2025	Pre-Consultation	1090 Bronte St.	Boyne	ZBLA & LOPA	Mixed Use Node	150,156.41
2025	Pre-Consultation	6901 Derry Rd.	Bronte Triangle Employment	ZBLA & LOPA	Commercial	88,326.30
2025	SP-11-25	1220-1290 Steeles Avenue E.	Steeles-Maple Commercial	SITE PLAN	Commercial	13,185.78
2025	SP-11-24	7419 Tremaine Rd.	Sherwood	SITE PLAN	Commercial	9,999.66
2025	Pre-Consultation	6781 Trafalgar Rd.	Trafalgar	ZBLA	Gas Service Station	5,345.35

Source: Town of Milton Planning Department