



Draft Employment Lands Supply Analysis

United Counties of
Leeds and Grenville

Athens
Augusta
Edwardsburgh/Cardinal
Elizabethtown-Kitley
Front of Yonge
Leeds and the Thousand Islands
Merrickville-Wolford
North Grenville
Rideau Lakes
Westport

TABLE OF CONTENTS

1.0 Introduction 1

 1.1 Geographic Context 2

 1.2 Study Scope 3

2.0 Existing Conditions 6

 2.1 Local Policy Directions & Economic Development Activities 6

 2.2 Key Industries & Major Employers 11

 2.3 Occupied Industrial Properties 12

3.0 Employment Demand Overview 19

4.0 Employment Lands Profile (Supply) 21

 4.1 Employment Lands Supply 21

 4.2 Development Activity & Absorption Trends 30

 4.3 Potential Employment Areas 31

5.0 Competitive Factors & Forces of Change 32

 5.1 Economic Outlook 32

 5.2 Relevant Forces of Change 33

 5.3 Competitive Factors 35

6.0 Supply-Demand Balance & Potential Land Needs 42

7.0 Conclusions & Recommendations 43

 7.1 Investment Readiness 43

 7.2 Employment Policy Recommendations 48

References 53

Appendix A – MPAC Property Code Categorization

Appendix B – Size Profiles, Occupied Clustered Industrial Parcels

Appendix C – Employment Area Land Supply Maps

Appendix D – Full Size Maps (Exhibits 5, 26 & 29)

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1.0 INTRODUCTION

MMM Group Limited (MMM) was retained by the United Counties of Leeds and Grenville (Leeds Grenville) in 2014 to undertake an Employment Lands Supply Analysis as input to Leeds Grenville's new Official Plan. This Study is the supply counterpart to a concurrent employment lands demand study undertaken by Hemson Consulting Ltd. (Hemson). Together, the Studies will assist Leeds Grenville, and their constituent local municipalities to ensure a sufficient supply of designated employment lands that are competitive and capable of attracting and supporting projected needs.

The overall Official Plan project is also being undertaken by MMM, in association with Hemson, in three stages. Both this Employment Lands Supply Report and Hemson's Demand Report are part of Stage One, Background, Policy Options & Directions. The purpose of this Study is to identify Leeds Grenville's employment lands requirements under the *Provincial Policy Statement (PPS) 2014*, taking into account its competitive position relative to other relevant area municipalities. The Study assesses whether Leeds Grenville has a sufficient supply of employment area lands, in terms of quantity, quality and geographic distribution, to meet its growth needs to 2036 and beyond. It is also framed to assist Leeds Grenville, and its constituent local municipalities to meet their employment areas obligations under the 2014 PPS, including the following policies:

- Section 1.1.2, which requires Leeds Grenville to supply a range and mix of land to meet projected needs for up to 20 years. Sufficient land must also be made available through intensification and redevelopment and, if necessary, designated growth areas within settlement areas;
- Section 1.2.6, which requires Leeds Grenville to plan for and protect major facilities and sensitive land uses from encroachment and conflicting uses, mitigate the adverse effects and ensure the long-term viability of major facilities;
- Section 1.3.1, which requires Leeds Grenville to provide for a mix and range of employment and institutional uses to meet long-term needs and to maintain a range and choice of suitable employment sites to support the needs of existing and future businesses. It also encourages mixed use development with compatible employment uses and requires that necessary infrastructure be provided to support current and projected needs;

- Section 1.3.2 which requires Leeds Grenville to plan for, protect and preserve clustered employment areas for current and future uses and ensure that necessary supporting infrastructure is provided. It protects these areas where they are in proximity to major goods movement facilities and corridors that require those locations. These lands may only be converted for other purposes where a comprehensive review demonstrates that the lands are not needed to meet long term employment requirements and the alternative use on the lands is needed. This Section also allows the Counties to plan for the long-term protection of employment areas lands beyond the timeframe specified in Section 1.1.2, provided that lands are not being designated beyond the 20 year timeframe; and,
- Section 1.7.1, which specifies the planning factors that Leeds Grenville should consider to ensure that communities are planned to facilitate investment readiness.

1.1 Geographic Context

Leeds Grenville is located in Eastern Ontario in an area of rich natural heritage comprised of significant landscapes and waterways. These include the Canadian Shield, the St. Lawrence River and 1000 Islands Region, the Rideau Canal UNESCO World Heritage Site and the Frontenac Arch Biosphere Reserve, a UNESCO World Biosphere Reserve.

Leeds Grenville is bordered to the east by the United Counties of Stormont, Dundas and Glengarry, to the north by the County of Lanark, and to the west by the County of Frontenac. Leeds Grenville is also situated between the City of Kingston and the National Capital Region and City of Ottawa.

Leeds Grenville has an area of 3,384 km² and contains the following ten member municipalities:

- Township of Athens
- Township of Augusta
- Township of Edwardsburgh/Cardinal
- Township of Elizabethtown-Kitley
- Township of Front of Yonge
- Township of Leeds and the Thousand Islands
- Village of Merrickville-Wolford
- Municipality of North Grenville
- Township of Rideau Lakes
- Village of Westport

The City of Brockville, Town of Gananoque, and Town of Prescott are separated municipalities that are geographically part of Leeds Grenville. The Town of Smith Falls is another separated municipality associated with the County of Lanark, and is on the northwestern boundary of Leeds Grenville.

1.2 Study Scope

For the purposes of this Study, “Leeds Grenville” refers to the government of the United Counties of Leeds and Grenville and collectively to its lower-tier municipalities which include Athens, Augusta, Edwardsburgh/Cardinal, Elizabethtown-Kitley, Front of Yonge, Leeds and the Thousand Islands, North Grenville, Rideau Lakes, Merrickville-Wolford and Westport but exclude Brockville, Prescott and Gananoque. The separated municipalities of Brockville, Prescott and Gananoque are collectively referred to as “partner municipalities”. The Leeds Grenville “Census Division” refers collectively to all the municipalities in the Counties both constituent and separated.

“Employment Lands” historically referred to areas that hosted clusters of “industrial” uses. Contemporary definitions have broadened, however, to encompass lands capable of hosting major employers and supporting agglomeration economies. The 2014 PPS defines Employment Areas as, “those areas designated in an official plan for clusters of business and economic activities including, but not limited to, manufacturing, warehousing, offices, and associated retail and ancillary facilities.” These types of employers generally require larger, ground-oriented, fully-serviced, land holdings with convenient access to high capacity transportation connections, such as highways. Typical uses include manufacturing and distribution; warehousing; research and development; commercial, institutional and accessory retail. In some cases, employment areas also host major office as well as ancillary retail, community facilities and places of worship.

This Study does not address retail, community facilities and places of worship in Leeds Grenville as they are predominantly population-related uses, the land needs of which are already accommodated in normal planning processes. Office uses are also excluded as virtually all such employment in Leeds Grenville’s constituent municipalities is population-serving and related to public administration or institutional uses and located outside of clustered industrial areas.

This Study therefore focuses on information relevant to assisting Leeds Grenville to plan for regionally-significant employment areas. These areas typically accommodate single-storey, light industrial buildings that occupy the majority of its designated employment land and business park areas, and are likely to continue to seek out lands in these designations. The Study also considers Highway Commercial designations in Leeds Grenville in recognition of the fact that while a subset of clustered industrial growth may locate in these areas, they are primarily intended to accommodate large format retail commercial development and not for the protection of employment areas-related growth needs defined in the 2014 PPS.

The key geographic focuses of the Study are on employment area land supply and the nature of demand for these lands in Leeds Grenville; however, relevant comparative and strategic data gathering and analysis (using available published sources) is also provided with respect to:

- the separated Cities of Brockville, Prescott & Gananoque; and,
- the neighbouring Counties of Lanark (including Smiths Falls), Stormont, Dundas & Glengarry (including Cornwall) and Frontenac (including Kingston).

1.2.1 Assumptions & Limitations

The primary data sources relied upon for this analysis included:

- PDF & paper copies of relevant municipal planning and economic documents, including Official Plans and Zoning By-laws;
- Parcel data provided by Leeds Grenville which included parcel assessment roll numbers;
- A limited subset of Municipal Property Assessment Corporation (MPAC) assessment data provided by Leeds Grenville, that included assessment roll number and MPAC property codes;
- Official Plan Designations in GIS / CAD formats compiled and forwarded by Leeds Grenville;
- Zoning data, joined to parcel, in GIS / CAD formats compiled and forwarded by Leeds Grenville;
- Limited servicing data, joined to parcel, in GIS formats compiled and forwarded by Leeds Grenville;
- Limited Business directory information forwarded by Leeds Grenville which included available employer information in excel format;
- Aggregated building permit data compiled and forwarded by Leeds Grenville;
- Published employment land-related studies from neighbouring and competing jurisdictions;
- Relevant socio-economic / demographic information, including projections, provided by Hemson; and,
- GIS employer location information from 2012 from Environics Analytics.

A number of data availability and consistency issues were encountered which required the Study Team to take measures to ensure that the Study would meet Leeds Grenville's needs in relation to identifying and protecting employment lands of regional significance. These measures included:

- manually cross-referencing, digitizing and confirming relevant Official Plan designations and Zoning information as necessary;
- requesting and joining Leeds Grenville-wide MPAC assessment data and parcel data and enhancing this data as necessary through manual research and comparison to other available GIS data;
- preparing maps of occupied and vacant employment lands parcels and seeking input from Leeds Grenville to confirm and enhance the quality of the MPAC assessment data; and,
- Using Environics Analytics GIS employer data in conjunction with Leeds Grenville's business directory information.

Another limitation of the GIS data was that most layers, such as the Official Plan designation layers, were not parcel accurate. This is a commonly encountered issue which makes it difficult to reliably distinguish whether parcels located near the edge of designation boundaries actually cross over the designation or vice versa without site-specific review. The Study addressed this issue by splitting all parcels through a GIS union to the mapped designation boundaries. Therefore, any portion of a parcel falling within an Industrial / Business Park or Highway Commercial designation was captured in the designated area. As a result, while the hectarage figures provided in this report are generally accurate, parcel counts may be inaccurate. Hectarage size profiles were therefore prepared and reviewed to provide a meaningful analysis of employment area land supply with respect to lot size mix.

2.0 EXISTING CONDITIONS

This Section provides an overview of local policy directions, including land use designations, of relevance to employment lands development, the distribution and nature of major employers in the Leeds and Grenville Census Division and the nature and disposition of existing industrial land uses in Leeds Grenville. The purpose of this analysis is to identify and characterize the nature of Leeds Grenville's existing employment areas and to distinguish whether they function as regionally or locally significant focal points for industrial development.

2.1 Local Policy Directions & Economic Development Activities

As a part of building and maintaining economic readiness, Leeds Grenville has identified three economic corridors of opportunity, which it intends to further define and develop. These areas originated from the understanding that local municipalities in Leeds Grenville, though distinct, also possess similar characteristics.

The St. Lawrence River / Highway 401 - Highway 2 corridor is an east-west corridor which stretches through the Township of Leeds and the Thousand Islands. The other two corridors run north-south. The Highway 15 / Rideau Heritage Route corridor traverses Augusta and Merrickville-Wolford. The remaining corridor follows Highway 416 and is known as the Capital Corridor.

Leeds Grenville released its latest Economic Development Action Plan and Strategic Approach in 2013, which laid out seven broad economic development goals for the 2013 to 2016 period. Leeds Grenville also identified specific industry clusters / sectors of interest for economic development. For instance, the need for a cold storage facility was identified to support the agricultural sector and supporting, leveraging and expanding Leeds Grenville chemical and bio-products clusters were prioritized.

Leeds Grenville is also engaging with governmental and non-governmental partners such as the Ontario East Economic Development Commission and taking advantage and assisting developers and businesses to leverage programs such as the Ontario Investment Ready Certified Site Program, Eastern Ontario Regional Network and the Eastern Ontario Development Program and Eastern Ontario Development Fund.

2.1.1 Relevant Local Policies & Designations

All of the local Official Plans in Leeds Grenville include land use policies regarding industrial uses and industrial land development, as well as varying degrees of broader economic development policy. The following provides a summation of the relevant guidance articulated in these Plans with respect to industrial uses, and where applicable, the establishment and growth of designated areas for employment uses as defined by the PPS 2014.

Athens

The Township of Athens' Official Plan specifies that the Township has "...limited commercial or industrial enterprises within its borders." However, the Plan also recognizes the importance of economic activities in terms of contributions to the tax base, providing local employment opportunities. The Plan permits and promotes limited light-industrial development in the settlement areas provided that they are low-volume water users. Rural industrial uses are also permitted in the rural area.

Augusta

The Township of Augusta Official Plan includes an Industrial Park designation applying to a cluster of lands along the Saint-Lawrence River. This Designation permits a full-range of employment area uses including manufacturing and processing, warehousing and wholesaling of bulk products, transportation depots and other ancillary commercial uses. Open storage is also permitted in the Designation.

The Settlement Area designation within the Augusta Official Plan also permits limited industrial uses, provided that they are compatible with the surrounding community and necessary servicing is available. The permitted uses include manufacturing and processing, warehousing and wholesaling or other related commercial uses.

The Rural designation permits agriculture-related industrial uses, uses which meet the needs of the travelling public and custom workshops. The zoning bylaw shall address the development criteria for non-residential development within the Rural designation.

Edwardsburgh/Cardinal

The Township of Edwardsburgh / Cardinal identifies an Industrial Park designation along the Saint-Lawrence River. The Plan also identifies a Highway Commercial designation which permits limited employment area type uses.

The Industrial Park designation contains policies to enhance economic development opportunities within the Township. The Designation permits a full-range of employment area type uses including manufacturing and processing, warehousing and wholesaling of bulk products, transportation depots and accessory commercial uses. The Designation also permits open storage and large-scale retail. The Plan also specifies that existing leased residential uses in this Designation are intended to be phased out.

The Township's Highway Commercial designation is intended to permit large format retail and service commercial development at provincial highway interchanges and along the international bridge corridor. The Designation however also permits Transportation Depots and "...other highway commercial uses appropriate or compatible with the location along a major transportation artery".

Limited industrial uses are also permitted in the Settlement Area and Rural designations, however, the Plan recognizes that uses that maybe incompatible with the surrounding community are better suited in the Industrial Park designation.

Elizabethtown-Kitley

The Township of Elizabethtown-Kitley's Official Plan identifies County Road No. 29 as a growth corridor stretching from the Brockville City limits to New Dublin Road. New commercial and industrial developments within the Township are intended to be directed to this area and this is reflected in the Township's Industrial-Business Park designation. The Plan furthermore states that these designated lands are anticipated to accommodate the majority of light and medium industrial enterprises and that "...longer term demand for additional designated lands in the south part of the Township will be encouraged principally through the extension of these existing areas". The Industrial-Business Park designation permits rural and light industrial uses, provided that they are not major water users. Open storage is permitted within the Designation.

The Plan further recognizes that the north (Kitley) portion of the Township lacks significant lands designated to accommodate new industrial-business or commercial uses and acknowledges that redesignations may be required. The Township intends to encourage focused and concentrated redesignations as a result.

In general, industrial uses are not permitted within the Settlement Area designation of the Elizabethtown-Kitley Official Plan with the exception of "small-scale light industrial uses such as certain tradesperson's workshops". If industrial uses are to locate they are encouraged to be on the periphery of the settlement area and in particular when along the County Road No 29 corridor only those industrial developments that present minimal servicing demands shall be permitted. The Rural designation also permits industrial uses that are "small-scale and oriented to the rural economy".

Front of Yonge

The Township of Front of Yonge Official Plan states that the Township has limited existing industrial enterprises. However, the Plan recognizes "...the importance of economic activities in terms of contributions to the tax base, providing local employment and enhancing the tourism and recreational sectors of the economy". The Plan permits limited small-scale light-industrial development in the Settlement Areas as well as rural industrial uses in the Rural Area.

Leeds and the Thousand Islands

The Township of Leeds and the Thousand Islands Official Plan recognizes that “...industrial uses provide employment opportunities for Township residents as well as important services for area residents, tourists, businesses and the travelling public”. Limited commercial and industrial uses are permitted within the Agricultural designation, specifically small scale agriculture-related commercial and industrial uses that are directly related to farm operations. Further, the Township recognizes the importance of economic growth and mentions the potential to unlock potential economic opportunities through “the establishment of an industrial/business park”.

Merrickville-Wolford

The Village of Merrickville-Wolford Official Plan “encourages the development of limited industrial uses in the Designated Urban Area, in Hamlets or along County Roads, in order to control the scattering of such uses throughout the rural area”. The Plan also contains both Business Park and Highway Commercial designations. The Business Park designation permits limited light-industrial uses and certain compatible uses. Pending necessary municipal servicing upgrades, Business Park areas are intended to accommodate uses which do not generate large sanitary flows. Open storage is not contemplated in the designation, however, the Plan states that Council may considering adopting urban design and landscaping guidelines for this area. The Highway Commercial designation primarily permits commercial uses serving the motoring public, however, office uses are also permitted within the designation.

Industrial uses within the Rural designation are intended for those uses which would present a land use conflict if located in the urban area. Uses which require large sites or trucking access are examples of potential reason for locating within the Rural designation.

North Grenville

The Municipality of North Grenville has two employment area-related designations within its Official Plan; Industrial and Economic Enterprise. These designations are generally focused around Highway 416, which is promoted as an economic development corridor that connects from Highway 401 to Ottawa.

The Economic Enterprise designation is intended to provide development opportunities outside of the Downtown Commercial area for uses which would not be compatible within the built up area. The uses permitted within the designation include industrial and commercial development as well as outdoor storage, if screened appropriately.

The Industrial designation is intended to facilitate the clustering of industrial uses in order to “maximize compatibility and minimize any negative impact on nearby residential or other sensitive land uses”. Light industrial uses are permitted as well as limited accessory commercial uses.

The Highway Commercial designation permits commercial uses catering to the motoring public as well as office and wholesale uses. The Official Plan recognizes that light industrial uses may occur within the Highway Commercial designation and stipulates that any such uses must be fully enclosed within the building.

Limited light industrial uses are also permitted in the Rural designation and the Hamlet designation provided that the use is compatible with the surrounding land uses and does not have a high servicing demand.

Rideau Lakes

The Township of Rideau Lakes Official Plan was approved in 2004. A new Official Plan was drafted in 2011, however, the process has been put on hold pending further progress on Leeds Grenville Official Plan. The policies as they relate to industrial uses are largely unchanged in the draft Plan except for terminology refinements from Villages and Hamlets to Settlement Areas. The 2004 Official Plan permits limited industrial uses within the Agricultural designation for agriculture-related services. Limited Industrial uses related to the local economy are also permitted within the Rural designation, as well as outdoor storage. Generally, industrial uses are not permitted in the Villages and Hamlets designation, however, light industrial uses are contemplated dependent on establishing land use compatibility. Outdoor storage is prohibited.

Westport

The Village of Westport Official Plan permits employment uses within the Highway Commercial designation. Due to the small size and urban character of the Village, the Plan recognizes limited opportunities for large scale employment uses. The Highway Commercial designation permits office uses as well as a variety of commercial uses. This Designation is located along arterial roads and development would require buffering from any adjacent residential uses.

2.2 Key Industries & Major Employers

The largest employers in the partner municipalities, as well as Leeds Grenville, are summarized in Exhibit 1 and Exhibit 2. This information was compiled from business directory information provided by Leeds Grenville Economic Development Office (2014) and illustrates the location, magnitude and nature of major employers in the Census Division. From this analysis, it is clear that the dominant employment area employers in the Census Division are clustered in the partner municipalities and that a significant proportion of employers are in the public administration, health and institutional sectors.

Exhibit 1. Major Employers in the Partner Municipalities.

Employer	Type	Total Employees 2014	Municipality
Upper Canada District School Board	Public Admin / Health / Institutional	1,397	Brockville
Brockville General Hospital (BGH)	Public Admin / Health / Institutional	850	Brockville
Procter & Gamble Inc. (P&G)	Employment	557	Brockville
Covidien (Ludlow Technical Products Canada Ltd.)	Employment	400	Gananoque
United Counties of Leeds and Grenville	Public Admin / Health / Institutional	425	Brockville
OLG Casino Thousand Islands	Population-related	420	Gananoque
Trillium Health Care Products Inc.	Employment	328	Brockville
3M Canada Company	Employment	300	Brockville
Walmart Brockville	Population-related	290	Brockville
Transcom	Employment	276	Brockville
City of Brockville	Public Admin / Health / Institutional	275	Brockville
Kriska Transportation	Employment	260	Prescott
St. Lawrence Lodge	Public Admin / Health / Institutional	280	Brockville
Canarm Ltd.	Employment	170	Brockville

The two largest employers in Leeds Grenville are in the industrial food manufacturing and processing sectors, which are sectors that may be accommodated in either employment areas or in rural industrial contexts. While many of the largest employers were located in sectors that predominantly locate in employment areas, they generally had significantly fewer workers than the largest employers in the partner municipalities.

Exhibit 2. Major Employers in Leeds Grenville.

Employer	Sector	Total Employees 2014	Municipality
Burnbrae Farms Ltd.	Employment	325	Elizabethtown-Kitley
Ingredion Canada Incorporated (formerly Casco Inc.)	Employment	215	Edwardsburgh/Cardinal
Prysmian Group	Employment	200	Edwardsburgh/Cardinal
Kemptville Truck Centre Limited	Population-related	200	North Grenville
Scalar Decisions Inc	Employment	150	Leeds and the Thousand Islands
Canada Border Service Agency Lansdowne	Public Admin / Health / Institutional	120	Leeds and the Thousand Islands
G. Tackaberry & Sons Construction Co. Ltd.	Employment	120	Athens
eSolutionsGroup Ltd	Employment	110	Front of Yonge
730 Truck Stop Inc.	Employment	100	Edwardsburgh/Cardinal
Invista (Canada) Company	Employment	100	Augusta
University of Guelph, Kemptville Campus	Public Admin / Health / Institutional	100	North Grenville
Valley Bus Lines	Employment	100	North Grenville
ORMG	Employment	85	North Grenville

2.3 Occupied Industrial Properties

As stated in the introduction, not all industrial properties fall within the PPS 2014 definition of employment areas. This analysis is intended to assist in identifying Leeds Grenville’s existing employment areas through a review of the geographic clustering of occupied industrial lands, the relevant Official Plan designations that they are subject to, the range of lot sizes that they occupy and the range of industries that utilize them.

Municipal Property Assessment Corporation (MPAC) Data was analyzed to characterize the physical nature of existing occupied industrial properties in Leeds Grenville. A key part of this analysis involved identifying individual MPAC property codes that correspond with employment uses as defined by the PPS. For reference, MPAC property codes are standardized classification codes that MPAC assigns to describe land uses. MPAC assigns one code to every property. For example, code 541 is assigned to properties with a printing plant as the primary use and code 436 is assigned to properties where a large (generally a GFA greater than 30,000 ft²) freestanding retail store belonging to a national chain is the primary use.

The Study Team identified those MPAC property codes most likely to correspond with an employment use as described by the PPS; generally private-sector, non-agricultural / extractive Industrial land uses. A listing of how MPAC properties codes were categorized for this Study is provided in Appendix A. This analysis identified a total of 228 occupied industrial parcels comprising approximately 1,920 ha of land spread across Leeds Grenville.

2.3.1 Geographic Distribution

As shown in Exhibit 3, Augusta and Edwardsburgh/Cardinal host approximately 63% of all the occupied industrial hectareage of Leeds Grenville whereas Leeds and the Thousand Islands, Elizabethtown-Kitley, North Grenville, Rideau Lakes, Athens and Merrickville-Wolford share approximately 36% and Front of Yonge and Westport share less than 1%. Exhibit 3 shows, in terms of the number of occupied industrial parcels in Leeds Grenville, that Elizabethtown-Kitley and North Grenville share approximately 47%, whereas Edwardsburgh / Cardinal, Rideau Lakes Leeds and the Thousand Islands and Augusta share 42% and the remaining 11% is shared by Merrickville-Wolford, Athens, Westport and Front of Yonge. This analysis indicates that employment areas may exist in Augusta, Edwardsburgh/Cardinal, Elizabethtown-Kitley and North Grenville.

Exhibit 3. Distribution of Occupied Industrial Parcels in Leeds & Grenville.

Municipality	Area Ha	%	Municipality	Number of Parcels	%
Augusta	623	32.5%	Edwardsburgh/Cardinal	63	27.6%
Edwardsburgh/Cardinal	586	30.5%	North Grenville	45	19.7%
Elizabethtown-Kitley	155	8.1%	Elizabethtown-Kitley	30	13.2%
North Grenville	136	7.1%	Rideau Lakes	27	11.8%
Merrickville-Wolford	71	3.7%	Leeds & the Thousand Islands	20	8.8%
Athens	83	4.3%	Augusta	19	8.3%
Front of Yonge	6	0.3%	Merrickville-Wolford	9	3.9%
Leeds & the Thousand Islands	151	7.9%	Athens	8	3.5%
Rideau Lakes	101	5.2%	Westport	4	1.8%
Westport	8	0.4%	Front of Yonge	3	1.3%
Leeds Grenville	1,920	100.0%	Leeds Grenville	228	100.0%

2.3.2 Policy Designations

Exhibit 4 categorizes the municipal hectareage of occupied industrial parcels by local Official Plan designation and clustering and Exhibit 5 illustrates the location of these designations. A full size version of Exhibit 5 is provided in Appendix D. These results indicate that virtually all occupied industrial parcels in Augusta are clustered and concentrated in the Industrial and Business Park designations of the municipality. Edwardsburgh/Cardinal also demonstrated a significant concentration at 44% and Elizabethtown-Kitley and North Grenville had concentrations of 24% and 19% respectively. While Merrickville-Wolford did have some occupied industrial hectareage in its Industrial and Business Park designations, the amount was negligible at only 3%. The remaining municipalities did not have any designated Industrial and Business Park areas.

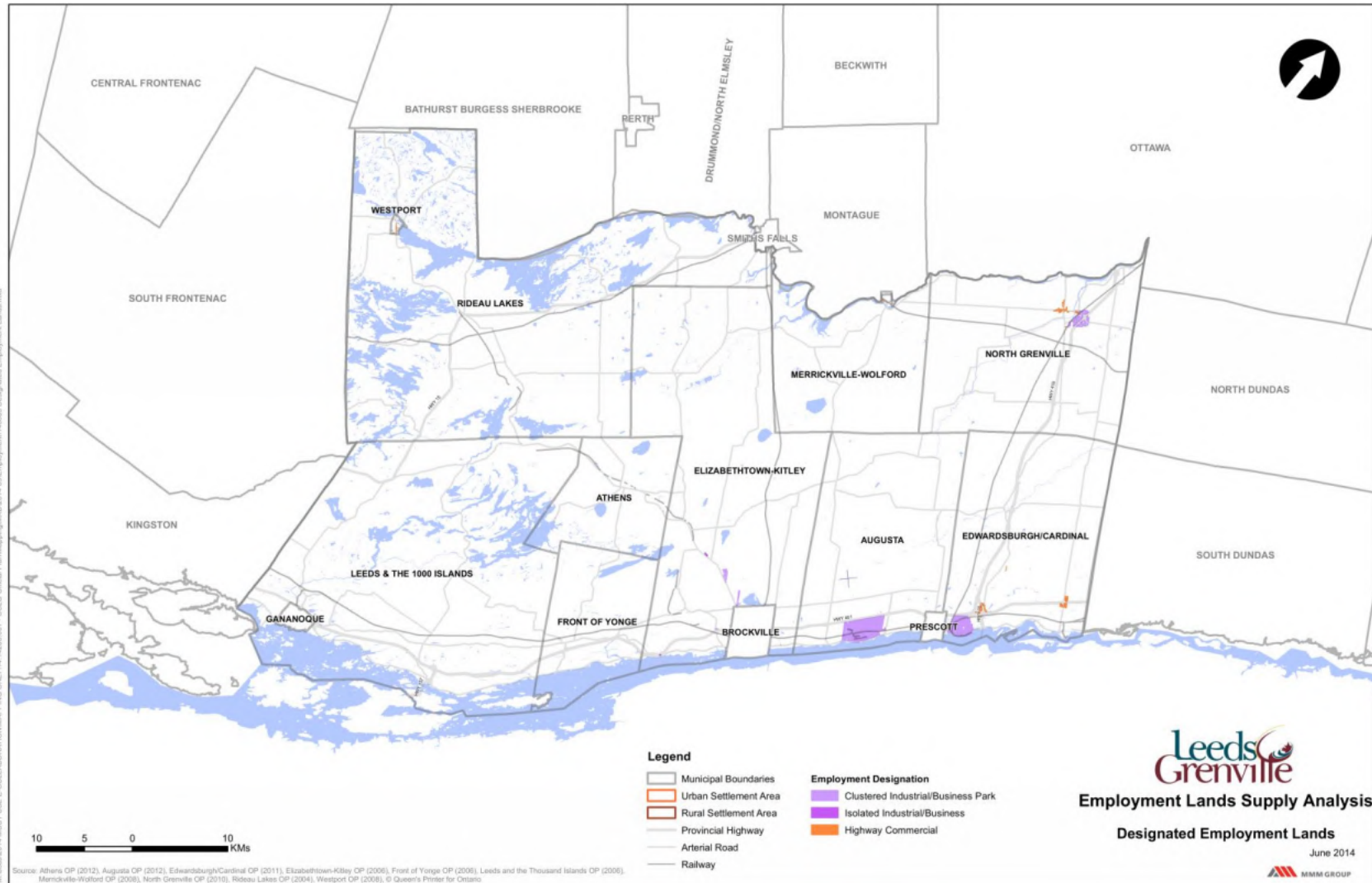
Elizabethtown-Kitley was the only municipality with occupied industrial parcels that were designated as Industrial and Business Park on an isolated site-specific basis, however, this amounted to only 3% of the total occupied industrial hectareage of the municipality. Similarly, in those municipalities with a Highway Commercial designation, none were found to have a significant concentration of occupied industrial uses in them.

Based on the relative concentration of occupied industrial hectareage, Leeds Grenville’s regionally significant employment areas are likely located in the clustered and designated industrial and business parks in Augusta, Edwardsburgh/Cardinal, Elizabethtown-Kitley and North Grenville.

Exhibit 4. Hectareage of Occupied Industrial Parcels.

Municipality	Hectareage of Occupied Industrial Parcels									
	Industrial & Business Parks				Highway Commercial		Other Designation		Total	
	Clustered		Isolated							
Augusta	585	94%		0%		0%	38	6%	623	100%
Edwardsburgh/Cardinal	256	44%		0%	4	1%	326	56%	586	100%
Elizabethtown-Kitley	37	24%	5	3%		0%	113	73%	155	100%
North Grenville	26	19%		0%	3	2%	107	79%	136	100%
Merrickville-Wolford	2	3%		0%	6	8%	63	89%	71	100%
Athens		0%		0%		0%	83	100%	83	100%
Front of Yonge		0%		0%		0%	6	100%	6	100%
Leeds & the Thousand Islands		0%		0%		0%	151	100%	151	100%
Rideau Lakes		0%		0%		0%	101	100%	101	100%
Westport		0%		0%	1	9%	8	91%	8	100%
Total	906	47%	5	0%	13	1%	995	52%	1,920	100%

Exhibit 5. Relevant Employment Area Designations.



2.3.3 Parcel Size Ranges

As industrial land uses generally require larger lot sizes than their residential and commercial counterparts, Exhibit 6 summarizes the average size of existing occupied industrial parcels in Leeds Grenville. The largest average occupied industrial parcels were found in Augusta at approximately 33 ha followed by Edwardsburgh/Cardinal at 20 ha. Average occupied industrial parcel sizes in Athens, Merrickville-Wolford and Leeds and the Thousand Islands ranged between 10 and 8 ha. The smallest average parcels sizes were found in Rideau Lakes, North Grenville, Elizabethtown-Kitley, Westport and Front of Yonge.

Exhibit 6. Average Occupied Industrial Parcel Size by Municipality.

Municipality	Average Parcel Size in Ha	Municipality	Average Parcel Size in Ha
Augusta	33	North Grenville	3
Edwardsburgh/Cardinal	20	Elizabethtown-Kitley	2
Athens	10	Front of Yonge	2
Merrickville-Wolford	8	Westport	2
Leeds and the Thousand Islands	8	Leeds Grenville	8
Rideau Lakes	4		

Because employment areas, as defined by the 2014 PPS, are also required to provide a competitive cross section of lot sizes to meet demand, including larger lots, a summary parcel size profile is provided in Exhibit 7 which provides average occupied industrial parcel sizes by Official Plan designation and parcel clustering patterns. This exhibit indicates that larger lots consistent with employment areas are located in the clustered and designated Industrial and Business Parks in Augusta, Edwardsburgh/Cardinal, North Grenville and Elizabethtown-Kitley.

In addition to indicating that Highway Commercial lot sizes are smaller on average, this analysis also identified some larger occupied industrial parcels in other designations within Edwardsburgh/Cardinal. These lots included: a 250 ha unspecified industrial development along Glen Smail Rd.; a 130 ha grain elevator facility west of Johnstown; a 14 ha unspecified industrial development at 2320 County Rd. 21; and, the 12 ha Ingredion facility in Cardinal.

Leeds Grenville-wide and municipality-specific lot size profiles were also prepared for occupied industrial lands in clustered Industrial and Business Park designations, as shown in Appendix B. Out of 68 reported occupied industrial parcels in these areas, the average parcel size was 13.3 hectares. Parcels smaller than 1 ha represented approximately 53% of all occupied industrial parcels in these areas, however, they contributed only approximately 2% of the hectareage. Conversely, occupied industrial parcels over 10 ha in size represent approximately 12% of occupied industrial parcels of all sizes, but contribute approximately 90% of the hectareage. These results indicate that there are some employers in these employment areas with very large land requirements.

Breaking down the information municipally, Augusta and Edwardsburgh/Cardinal have the largest average occupied industrial parcel sizes in their clustered Industrial and Business Parks at approximately 84 and 21 ha, respectively. North Grenville, Elizabethtown-Kitley and Merrickville-Wolford had much smaller occupied industrial parcels in their clustered Industrial and Business Parks.

Exhibit 7. Average Occupied Industrial Parcel Size by Municipality & Designation.

Municipality	Average size of Occupied Industrial Parcels in Hectares				
	Industrial & Business Park		Highway Commercial	Other Designation	Total
	Clustered	Isolated			
Augusta	83.5			3.2	32.8
Edwardsburgh/Cardinal	21.4		4.4	19.1	19.5
North Grenville	1.9		0.8	3.8	3
Elizabethtown-Kitley	1.1	1.8		4.2	2.5
Merrickville-Wolford	1		5.8	10.5	7.8
Athens				10.3	10.3
Front of Yonge				1.9	1.9
Leeds and the Thousand Islands				7.6	7.6
Rideau Lakes				3.7	3.7
Westport			0.2	7.7	2.1
Grand Total	13.3	1.8	1.7	6.7	8.4

2.3.4 Industry Mix

A review of MPAC property codes, business directory information and desktop research illustrated a varied range of occupied industrial uses in the clustered Industrial / Business Parks, including industrial malls, to warehousing to heavy manufacturing and petroleum facilities. Some of the larger industrial employers in these areas are listed in Exhibit 7. Occupied industrial properties located in the Highway Commercial designations, however, were predominantly all warehousing. Isolated occupied industrial properties that were designated as Industrial / Business Park were also located at 2407 County Road 46 (used car dealership / garage), 4618 Airport Road (airport related) and 1209 County Road 2 in Elizabethtown-Kitley (construction).

Exhibit 8. Largest Industrial Land Users in Clustered Industrial / Business Parks.

Municipality	Cluster	Company	Description
Augusta	3	Invista (Canada) Company	Manufacturing (textiles)
Augusta	3	Dyno Nobel Nitrogen Inc	Manufacturing (explosives)
Augusta	3	Dupont Canada	Manufacturing (chemicals)
Augusta	3	Liquid Carbonic Inc	Manufacturing (chemicals)
Augusta	3	Nitrochem Corp	Manufacturing (chemicals)
Edwardsburgh/Cardinal	2	Greenfield Ethanol Limited	Manufacturing (chemicals)
Edwardsburgh/Cardinal	2	Prysmian Group	Manufacturing (cables)
Edwardsburgh/Cardinal	2	Prescott Machine & Welding	Manufacturing
Edwardsburgh/Cardinal	2	Travelers Transportation	Transportation & Warehousing
Edwardsburgh/Cardinal	2	Mt Investments Inc	Finance & Insurance
Elizabethtown-Kitley	5	Industrial Refrigeration	Transportation & Warehousing
Elizabethtown-Kitley	5	Locke Truss Company Limited	Manufacturing
North Grenville	1	Jarvis Design & Display Ltd	Manufacturing

3.0 EMPLOYMENT DEMAND OVERVIEW

Hemson's Growth and Settlement Analysis (2014) projects a net 10.8% decline in employment lands employment, a 1.3% decline in rural employment and a 3.6% increase in population-related employment in Leeds Grenville between 2011 and 2031. The employment land employment component was projected to decline across all municipalities between 2011 and 2031, the rural employment component was projected to remain constant or decline slightly in the various municipalities and population-related employment was project remain constant across all the municipalities with the exception of Elizabethtown-Kitley. Population-related employment in North Grenville and Edwardsburgh/Cardinal in particular were projected as having the highest growth in Leeds Grenville.

Hemson (2014) also reports that while the Census Division experienced a growth rate of 3.3.% in total place of work-based employment between 2001 and 2006, it experienced a slight decrease in the most recent (2006-2011) period (- 2%), part of which coincided with the 2008-2009 recession.

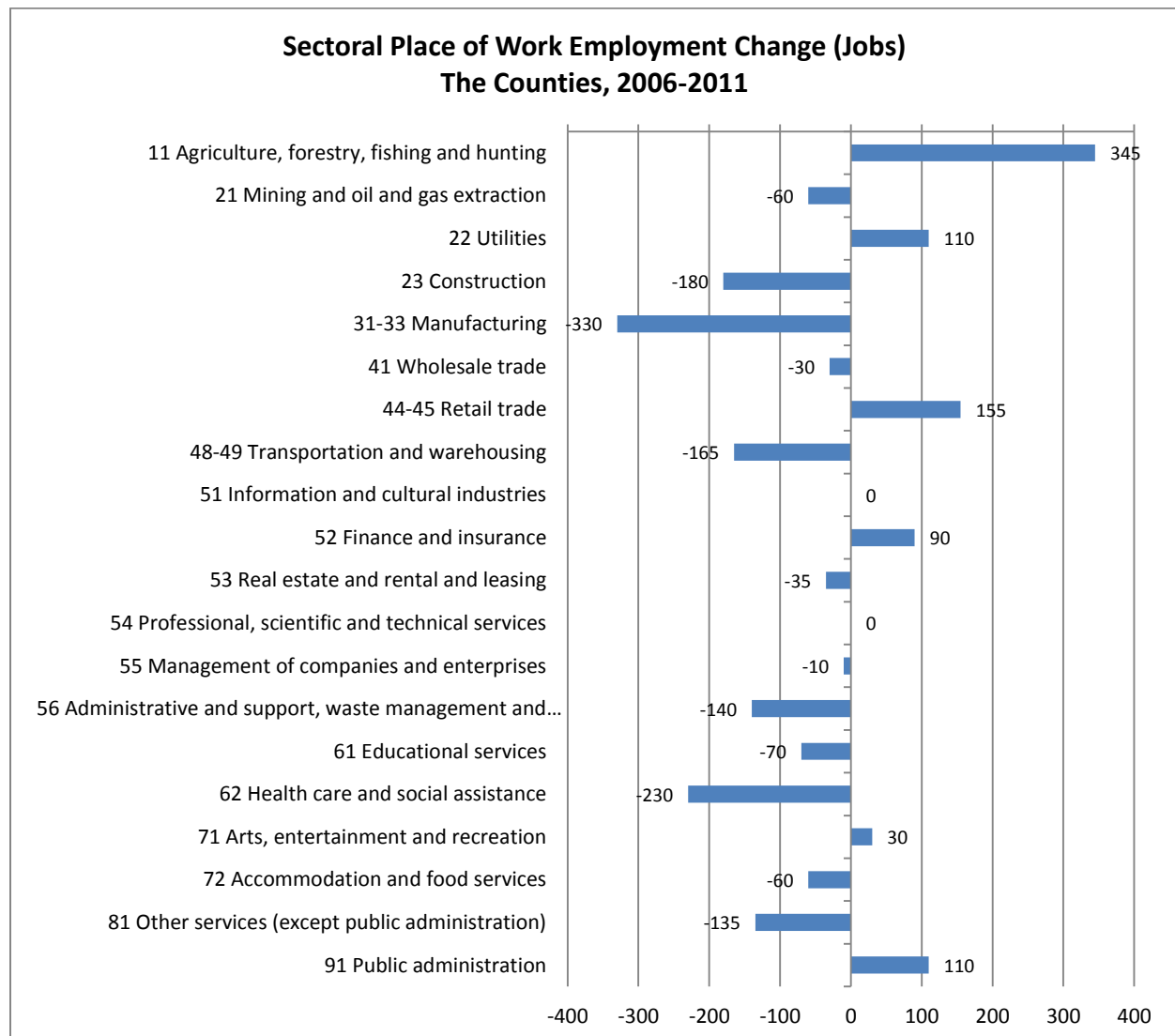
Notwithstanding this decline between 2006 and 2011, more severe percentage losses were experienced in the nearby Census Divisions of Lanark and Stormont, Dundas and Glengarry. Competing Census Divisions that were growing included Ottawa, Frontenac, Prescott and Russell and Renfrew, however, growth in Ottawa and Frontenac (which encompasses Kingston) was unsurprising as they are the largest Urban Centres in Eastern Ontario, and have relatively diversified economies.

While Prescott and Russell and Renfrew also experienced modest employment growth in this period, this was generally tied to population-related employment, particularly in retail, educational and healthcare in the case of Prescott and Russell and to healthcare and social services in the case of Renfrew. In particular, Prescott and Russell benefits from its geographic position between and proximity to Ottawa and Montreal. The population growth rate between 2006 and 2011 (6.5%) in Prescott and Russell sat well above the provincial and national averages and greatly exceeded Leeds and Grenville's figure for the same period (0.1%). Similarly, Hemson's report noted that North Grenville is leading population growth in Leeds Grenville, owing to its proximity and excellent highway access to Ottawa.

The structure of the Leeds and Grenville Census Division's economy also shifted significantly between 2006 and 2011. The bulk of the job losses during this period were concentrated in the traditional employment area sectors of manufacturing and transportation & warehousing, while moderate gains were made in professional, scientific & technical services and wholesale trade and small gains were made in utilities and construction. Employment gains in the predominantly population-related sectors were concentrated most significantly in public administration and retail trade and to a lesser extent in finance and insurance, educational services.

This structural shift away from manufacturing and toward retail trade is not unique to the Leeds and Grenville Census Division and is generally occurring across Ontario. Leeds Grenville actually experienced an overall net loss of 675 jobs over the 2006 to 2011 period, which accounts for 77.5% of all job losses in the Census Division. Exhibit 9 charts change in sectoral place of work employment information from Statistics Canada (2011). The largest losses in Leeds Grenville were in manufacturing, health care & social assistance, construction, transportation and warehousing, administrative and support, waste management and remediation services and other services (except public administration). The greatest gains were made in agriculture, forestry, fishing and hunting, retail trade, utilities, public administration and finance and insurance. Utilities are the only sector that grew that is predominantly found in employment areas.

Exhibit 9. Sectoral Employment Change by Place of Work in Leeds Grenville 2006-2011 (Statistics Canada 2006 & 2011).



4.0 EMPLOYMENT LANDS PROFILE (SUPPLY)

This Section, which is organized into three parts, describes the magnitude, location, character and quality of the County's vacant employment area land supply. The first section details the progression and results of the steps that the Study team used to narrow down the relevant supply of employment area lands.

4.1 Employment Lands Supply

This analysis built on the work carried out in Section 2.3, which identified the location of all existing occupied clustered industrial parcels, by cross-referencing those results to relevant Official Plan designations and adding vacant parcels. Vacant parcels, or portions thereof, were identified using MPAC property codes and a technique similar to that used to categorize occupied industrial properties. A listing of property codes considered to be vacant is provided in Appendix A. Maps illustrating Leeds Grenville employment areas identified by the Study are provided in Appendix C.

4.1.1 Identify Local Official Plan Designations that Permit PPS Employment Area Uses

The types of uses envisioned and planned for in Leeds Grenville Industrial and Business Park designations are most directly related to Employment Areas and Employment Area uses, as defined in the 2014 PPS. However, the 2014 PPS definition further specifies that such areas are to be planned to host clusters of employment uses for reasons of land use compatibility, infrastructure, transit and servicing efficiency and to promote desirable agglomeration effects. As a result, it was necessary for the Study Team to focus primarily on the subset of industrially occupied and vacant lots located in Designated Industrial / Business Park areas where industrial clustering has or is possible to occur.

It was also necessary to review the supply of vacant lands in the Highway Commercial designations of the local Official Plans as they can permit a subset, though limited, of employment area uses, as defined by the PPS 2014. However, it is recognized that this supply is unlikely to be developed for significant industrial purposes, given recent historic trends, as the foundational purpose of designating employment areas in local Official Plans is to protect and prioritize them for employment purposes.

Empirically, land demand for virtually all other urban uses has tended to outstrip demand for industrial and other employment area type uses. Since the employment, municipal revenue and economic spin-off effects of employment areas are so vital to the long-term sustainability of municipalities, the 2014 PPS requires that municipalities designate sufficient lands to maintain the viability of existing employment areas and meet projected employment needs and protect strategic lands that may be needed to meet long-term employment area needs. In essence, while some industrial uses, as defined in the 2014 PPS, may be permitted in the Highway Commercial designations of Leeds Grenville, these areas are primarily intended to accommodate larger lot, highway-related commercial development.

4.1.2 Map the Designated Areas in GIS

As a foundational step to inventorying vacant parcels in areas with clustered, or planned to be clustered, industrial uses, it was necessary to map the boundaries of the relevant designations in GIS. The Study Team cross-referenced this mapping with the existing occupied industrial parcel inventory described in Section 2.3 and MPAC property codes indicative of vacant parcels. This analysis identified approximately 1,889 ha of land in Leeds Grenville that was both clustered and Designated as Industrial or Business Park, or Highway Commercial, as shown in Exhibit 10. The vast majority of these lands were located in Augusta, Edwardsburgh/Cardinal and North Grenville.

Exhibit 10. Designated Clustered Industrial / Business Park & Highway Commercial Lands by Municipality.

Municipality	Ha	%
Augusta	911	48%
Edwardsburgh/Cardinal	576	31%
North Grenville	280	15%
Elizabethtown-Kitley	96	5%
Westport	15	1%
Merrickville-Wolford	11	1%
Total	1,889	100%

Exhibit 11 indicates that a total of 9 vacant parcels totaling 36.9 ha, which were at least partially zoned for industrial uses, were identified in Settlement Area and Rural / Agricultural designations. None of the parcels were located in locations where industrial uses are likely to cluster.

Exhibit 11. Vacant Industrially Zoned Lands Outside in Settlement Area & Rural / Agricultural Designations.

Municipality / Roll Number	Parcels	Ha	Location	Notes
Edwardsburgh/Cardinal	2	2.1		
70170103023202	1	1.5	CON 4 PT LOT 32 RP 15R6366 PART 1	Isolated parcel, lands appear to be significantly overlapped by natural heritage considerations.
70170200513900	1	0.6	JAMES ST N	Isolated urban parcel bounded by John St., New St., James St. & Victoria St. Appears to be a car and truck park adjacent to residential.

Municipality / Roll Number	Parcels	Ha	Location	Notes
Elizabethtown-Kitley	5	29.9		
80100001005500	1	5.1	Sharpe's Lane	Sharpe's lane between Hwy 401 and Hwy 2. Isolated parcel adjacent to an extractive use
80100001506500	1	4.8	CON 2 PT LOT 18	Isolated parcel overlapped by natural heritage considerations.
80100002007000	1	3.5	CON 3 PT LOT 26 PT LOT 27	Isolated parcel adjacent to 27/46.
80100003502700	1	11.5	6852 SIXTH CONCESSION RD	Isolated parcel overlapped by natural heritage considerations
80100003503101	1	5.0	CON 6 PT LOT 5	Isolated parcel overlapped by natural heritage considerations
Leeds and the Thousand Islands	1	2.0		
81281203009320	1	2.0	MCDONALD DR	Isolated parcel
North Grenville	1	2.9		
71971601505608	1	2.9	CON 2 PT LOT 15 RP 15R9318 PART 1	Isolated parcel in Acton Corners adjacent to a construction materials yard.
Total	9	36.9		

4.1.3 Isolate Which Designated Lands Meet 2014 PPS Employment Area Requirements

In general, Employment Areas, as described in the 2014 PPS, are to be protected and planned for through designation in local Official Plans, and these areas should be clustered. Further to this requirement, Exhibit 12 illustrates the magnitude to which lands have been designated in local official plans for Industrial / Business Park uses as well as Highway Commercial uses. The Study Team further divided the designated Industrial / Business Park lands into parcels that are isolated, and parcels that are clustered. This analysis therefore excludes Settlement Area and Rural / Agricultural designations in local official plans which may permit limited industrial uses as those broad designations do not prioritize and protect employment uses.

Out of a total of 1,889 ha specifically designated to permit industrial uses in the local official plans, approximately 1,661 ha were clustered Industrial / Business Park, 19 ha were isolated Industrial / Business Park and 209 ha were Highway Commercial. Based on this analysis, all lands specifically designated to permit industrial uses in Augusta were in the clustered Industrial / Business Park category as were a high proportion (73% to 81%) in Edwardsburgh/Cardinal, Elizabethtown-Kitley and North Grenville. It was also noted that the clustered Industrial / Business Park area identified in Elizabethtown-Kitley was found in two clusters geographically separated by Tincap. Elizabethtown-Kitley was also the only municipality in which isolated Industrial / Business Park parcels were identified. In Merrickville-Wolford, the majority of designated lands were actually Highway Commercial.

Exhibit 12. Designated Employment Area Lands by Official Plan Designation & Clustering Status.

Municipality	Designated Hectares							Total Designated
	Ind. / Bus. Park		Hwy. Com.	Total Designated	Ind. / Bus. Park		Hwy. Com.	
	Clustered	Isolated			Clustered	Isolated		
Augusta	911			911	100%	0%	0%	100%
Edwardsburgh/Cardinal	466		111	576	81%	0%	19%	100%
Elizabethtown-Kitley	78	19		96	80%	20%	0%	100%
North Grenville	205		76	280	73%	0%	27%	100%
Merrickville-Wolford	2		8	11	22%	0%	78%	100%
Westport			15	15	0%	0%	100%	100%
Total	1,661	19	209	1,889	88%	1%	11%	100%

Based on the above, Leeds Grenville’s employment areas are located in the clustered Industrial / Business Park category and, to a lesser extent, in the Highway Commercial category. Exhibit 13 summarizes how these lands are distributed across the local municipalities, indicating that the vast majority of the clustered Industrial / Business Park lands are concentrated in Augusta, Edwardsburgh/Cardinal and North Grenville, with a moderate amount in Elizabethtown-Kitley. The exhibit also indicates that the vast majority of the designated Highway Commercial lands are located in Edwardsburgh/Cardinal and Elizabethtown-Kitley.

Exhibit 13. Proportional Distribution of Clustered Industrial / Business Park & Highway Commercial Lands

Municipality	Clustered Ind. / Bus. Park. Ha.		Municipality	Hwy. Com. Ha.	
Augusta	911	55%	Edwardsburgh/Cardinal	111	53%
Edwardsburgh/Cardinal	466	28%	Elizabethtown-Kitley	76	36%
North Grenville	205	12%	Westport	15	7%
Elizabethtown-Kitley	78	5%	Merrickville-Wolford	8	4%
Merrickville-Wolford	2	0%	Augusta		0%
Westport		0%	North Grenville		0%
Total	1,661	100%	Total	209	100%

4.1.4 Identify Vacant Employment Lands in Employment Areas

Exhibit 14 summarizes the extent to which clustered Industrial / Business Park and Highway Commercial are occupied and vacant. These results indicate that clustered Industrial / Business Parks are largely being developed for Industrial purposes in Augusta and Merrickville-Wolford, whereas Elizabethtown-Kitley and North Grenville appear to have at least a quarter of their total lands being used for non-industrial purposes. However, these non-industrial uses may be ancillary or complementary to the primary industrial uses.

Augusta, Edwardsburgh/Cardinal and North Grenville also represent the greatest amount of vacant land supply, whereas Elizabethtown-Kitley's supply is only 29 ha and Merrickville-Wolford's clustered Industrial / Business Park supply is only 2 ha in their entirety.

Exhibit 14. MPAC Tax Code Use Status of Clustered Designated Industrial / Business Park Lands.

Municipality	Clustered Industrial / Business Park Hectares							
	Industrial		Other		Vacant		Total	
Augusta	578	63%	37	4%	295	32%	910	99%
Edwardsburgh/Cardinal	125	27%	52	11%	289	62%	466	100%
Elizabethtown-Kitley	27	35%	21	27%	29	38%	77	100%
Merrickville-Wolford	2	80%	0	6%	0	14%	2	100%
North Grenville	26	13%	65	32%	114	56%	205	101%
Total	759	46%	175	11%	727	44%	1661	101%

A similar analysis was also completed for the Highway Commercial category. Exhibit 15 indicates that Edwardsburgh/Cardinal and North Grenville have the most remaining supply of vacant lands in these Designations. It is also evident that while a significant proportion of Merrickville-Wolford's designated Highway Commercial lands are being used for Industrial purposes, it is only 9 ha in size in its entirety. It is therefore unlikely that the remaining vacant Highway Commercial lands in Merrickville-Wolford will contribute meaningfully to regional growth needs.

Exhibit 15. MPAC Tax Code Use Status of Highway Commercial Lands.

Municipality	Highway Commercial Hectares							
	Ind.		Other		Vacant		Total	
Edwardsburgh/Cardinal	4	4%	37	34%	69	62%	110	100%
Merrickville-Wolford	6	69%	1	10%	2	21%	9	100%
North Grenville	3	3%	54	71%	19	26%	76	100%
Westport	1	5%	11	75%	3	20%	15	100%
Total	13	6%	103	49%	93	45%	209	100%

4.1.5 Adjust for Natural Heritage Considerations (NHCs)

Having identified the supply of vacant employment area lands, it was then necessary to consider the effect of natural heritage considerations (NHC) on the supply. The Study Team erred on the side of caution by comparing all mapped heritage mapping layers that were provided by Leeds Grenville and calculating the remaining ‘unconstrained’ area of each parcel. It is important to note, however, that some natural heritage considerations may not be constraints to development if it can be determined, either from a policy standpoint or through a designation review that the feature boundaries should be adjusted in favour of employment lands designation. Exhibit 16 indicates that, after applying this control in the clustered Industrial and Business Park areas, Augusta had 109 ha or 36% of Leeds Grenville supply, Edwardsburgh/Cardinal had 100 ha or 33%, North Grenville had 65 ha or 22% and Elizabethtown-Kitley had 27 ha or 9% by hectarage.

Exhibit 16. Controlling for NHCs on Clustered Industrial / Business Park Lands.

Municipality	Cluster	Vacant Ha		Vacant Ha Net of NHC	
Augusta	Area 3	295.2	40.6%	109.1	36.3%
Edwardsburgh/Cardinal	Area 2	288.6	39.7%	99.5	33.1%
Elizabethtown-Kitley	Areas 4 & 5	29.4	4.0%	26.8	8.9%
	Area 4	28.4	3.9%	25.9	8.6%
	Area 5	1.0	0.1%	0.9	0.3%
Merrickville-Wolford	Area 6	0.3	0.1%	0.3	0.1%
North Grenville	Area 1	113.8	15.6%	65.0	21.6%
Total		727.2	100.0%	300.8	100.0%

Exhibit 17 shows that, after subtracting natural heritage considerations from the vacant supply in Highway Commercial areas, Edwardsburgh/Cardinal had 31 ha or 60% of Leeds Grenville supply and North Grenville had 16 ha or 31% by hectarage.

Exhibit 17. Controlling for NHCs Clustered Highway Commercial Lands.

Municipality	Vacant Ha		Vacant Ha Net of NHC	
Edwardsburgh/Cardinal	69.2	74.1%	30.6	59.6%
Merrickville-Wolford	1.8	1.9%	1.8	3.4%
North Grenville	19.4	20.8%	16.0	31.2%
Westport	3.0	3.2%	3.0	5.8%
Total	93.3	100.0%	51.4	100.0%

4.1.6 Adjust for Infrastructure, Servicing & Road Take-outs & Systemic Vacancy

As a portion of the overall land supply will be consumed to accommodate infrastructure, servicing and road associated with development. Hemson’s (2014) 25% takeout and 10% systemic vacancy factors were applied to derive adjusted vacant supply figures for both the clustered Industrial and Business Park areas and the designated Highway Commercial areas. Exhibit 18 summarizes each step of this adjustment process for the clustered Industrial and Business Park supply, accounting first for natural heritage considerations, infrastructure, roads and servicing and finally for systemic vacancy.

With respect to clustered Industrial / Business Park supply, this analysis indicates that Cluster 3, Augusta and Cluster 2, Edwardsburgh/Cardinal share the majority of the remaining adjusted land supply split almost evenly between them. A moderate amount of adjusted supply remains in Cluster 1, North Grenville and a much smaller amount in Cluster 4, Elizabethtown-Kitley. Cluster 4, Elizabethtown-Kitley, and Cluster 6, Merrickville-Wolford are both virtually built out.

Exhibit 18. Controlling for Infrastructure, Servicing, Roads & Systemic Vacancy on Clustered Industrial / Business Park Lands.

Municipality / Cluster		Total Vacant Ha.		Remaining Net Supply Ha.					
				Adjust for NHC		Adjust for Infrastructure, Roads & Servicing		Adjust for Systemic Vacancy	
Augusta	Area 3	295.2	40.6%	109.1	36.3%	87.2	36.2%	78.5	36.2%
Edwardsburgh / Cardinal	Area 2	288.6	39.7%	99.5	33.1%	80.0	33.2%	72.0	33.2%
Elizabethtown-Kitley	Areas 4 & 5	29.4	4.0%	26.8	8.9%	21.6	9.0%	19.4	9.0%
	Area 4	28.4	3.9%	25.9	8.6%	20.8	8.6%	18.7	8.6%
	Area 5	1.0	0.1%	0.9	0.3%	0.8	0.3%	0.7	0.3%
Merrickville-Wolford	Area 6	0.3	0.1%	0.3	0.1%	0.0	0.0%	0.0	0.0%
North Grenville	Area 1	113.8	15.6%	65.0	21.6%	52.0	21.6%	46.8	21.6%
Total		727.2	100.0%	300.8	100.0%	240.8	100.0%	216.7	100.0%

Exhibit 19 summarizes each step of the adjustment process for the Highway Commercial supply. This indicates that the remaining adjusted supply of Highway Commercial lands is significantly smaller than the clustered Industrial / Business Park supply and that the majority of it is concentrated in Edwardsburgh/Cardinal and North Grenville.

Exhibit 19. Controlling for Infrastructure, Servicing, Roads & Systemic Vacancy on Highway Commercial Lands.

Municipality	Total Vacant Ha.		Remaining Net Supply Ha.					
			Adjust for NHCs		Adjust For Infrastructure, Roads & Servicing		Adjust for Systemic Vacancy	
Edwardsburgh / Cardinal	69	74.2%	31	60.8%	24.8	60.8%	22.3	60.8%
Merrickville-Wolford	2	2.2%	2	3.9%	1.6	3.9%	1.4	3.9%
North Grenville	19	20.4%	16	31.4%	12.8	31.4%	11.5	31.4%
Westport	3	3.2%	3	5.9%	2.4	5.9%	2.2	5.9%
Total	93	100.0%	51	100.0%	40.8	100.0%	36.7	100.0%

Exhibit 20 summarizes the adjustment process for the combined supply of Industrial and Business Park and Highway Commercial lands. This indicates that the majority of the adjusted combined supply is located in Edwardsburgh/Cardinal, Augusta and North Grenville, with a smaller amount in Elizabethtown-Kitley.

Exhibit 20. Combined Final Adjusted Employment Lands Supply.

Municipality	Total Vacant Ha.		Remaining Net Supply Ha.					
			Adjust for NHCs		Adjust For Infrastructure, Roads & Servicing		Adjust for Systemic Vacancy	
Augusta	295.2	39.2%	109.1	31.0%	87.3	31.0%	78.6	31.0%
Edwardsburgh / Cardinal	289.3	38.5%	130.1	36.9%	104.1	36.9%	93.7	36.9%
Elizabethtown-Kitley	29.4	3.9%	26.8	7.6%	21.4	7.6%	19.3	7.6%
Merrickville-Wolford	2.1	0.3%	2.1	0.6%	1.7	0.6%	1.5	0.6%
North Grenville	133.2	17.7%	81	23.0%	64.8	23.0%	58.3	23.0%
Westport	3.0	0.4%	3	0.9%	2.4	0.9%	2.2	0.9%
Total	752.2	100.0%	352.1	100.0%	281.7	100.0%	253.5	100.0%

4.1.7 Vacant Supply (Net of NHC) Lot Size Profile

As employment areas, as defined in the PPS, are expected to provide a full cross-section of lot sizes to meet local economic needs, the Study Team profiled the supply by lot size and municipality, net of natural heritage considerations. Infrastructure, Roads and Servicing and systemic vacancy factors were not applied to this analysis as more precise supporting information would have been required to arrive at parcel-specific take-out factors.

Exhibit 21 and Exhibit 22 provide a breakdown of the number and hectareage of vacant lots in clustered Industrial and Business Park areas by municipality, specific employment cluster and lot size. It is likely that lots in the <.05 ha category are parcel slivers due to imprecise GIS data. There were a total of 82 lots identified in the analysis.

These results indicate that while North Grenville has a wide array of available clustered Industrial and Business Park lots less than 10 ha. in size, no larger lots remain. In Edwardsburgh/Cardinal, there is a wide range of available lots, including three lots over 10 ha in size totalling 66.4 hectares, which could be further subdivided to provide additional lot mix. While the lot size mix in Augusta, appears limited in terms of the number of lots available, more variety can similarly be achieved through subdivision of the 4 lots that are larger than 10 ha. Unsurprisingly given their much smaller overall sizes, the available lot range in the remaining clusters was constrained both in terms of number of lots and total hectareage.

Exhibit 21. Number of Vacant Parcels by Lot Size in Clustered Industrial & Business Park Areas.

Municipality	Cluster	Lot Size Range in Ha.							Grand Total
		<.05	.05-.5	.5-1	1-2	2-5	5-10	>10	
Augusta	Area 3		2		2	3	1	4	12
Edwardsburgh/Cardinal	Area 2		5	3	2	5	2	3	20
Elizabethtown-Kitley	Area 4			1		1	1	1	4
Elizabethtown-Kitley	Area 5	1	4						5
Merrickville-Wolford	Area 6		3						3
North Grenville	Area 1	8	8	6	5	8	3		38
Grand Total		9	22	10	9	17	7	8	82

Exhibit 22. Hectareage of Vacant Parcels (adjusted for NHCs) by Lot Size in Clustered Industrial & Business Park Areas.

Municipality	Cluster	Lot Size Range in Ha							Grand Total
		<.05	.05-.5	.5-1	1-2	2-5	5-10	>10	
Augusta	Area 3		0.2		2.5	11.3	7.1	88.1	109.1
Edwardsburgh/Cardinal	Area 2		0.9	2.7	2.9	14.8	11.8	66.4	99.5
Elizabethtown-Kitley	Area 4			0.9		3.7	5.8	15.5	25.9
Elizabethtown-Kitley	Area 5	-	0.9						0.9
Merrickville-Wolford	Area 6		0.3						0.3
North Grenville	Area 1	0.1	1.7	4.5	7.3	27.1	24.3		65.0
Grand Total		0.1	3.9	8.1	12.7	56.9	49.0	170.0	300.8

Exhibit 23 and Exhibit 24 provide the same summary for the Highway Commercial supply. There were a total of 38 lots identified in this analysis. These lots were generally significantly smaller than those available in the designated Employment Areas with virtually all of this supply being concentrated in the 2-5 ha range. Two larger lots over 5 ha in size appeared to be, however, available in Edwardsburgh/Cardinal, which could be further subdivided.

Exhibit 23. Number of Vacant Parcels by Lot Size in Highway Commercial Areas.

Municipality	Lot Size Range in Ha							Grand Total
	<.05	.05-.5	.5-1	1-2	2-5	5-10	>10	
Edwardsburgh/Cardinal		3	1	2	1	1	1	9
Merrickville-Wolford		1		1				2
North Grenville	3	10	2	7	1			23
Westport		2	1		1			4
Grand Total	3	16	4	10	3	1	1	38

Exhibit 24. Hectarage of Vacant Parcels by Lot Size in Highway Commercial Areas.

Municipality	Lot Size Range in Ha							Grand Total
	<.05	.05-.5	.5-1	1-2	2-5	5-10	>10	
Edwardsburgh/Cardinal		0.5	0.7	2.6	3.7	6.1	16.9	30.6
Merrickville-Wolford		0.1		1.6				1.8
North Grenville	0.0	1.8	1.7	9.9	2.5			16.0
Westport		0.3	0.6		2.1			3.0
Grand Total	0.0	2.7	3.0	14.2	8.4	6.1	16.9	51.4

4.2 Development Activity & Absorption Trends

Detailed, non-aggregated building permit data, including the specific location of development, was generally unavailable to the Study Team, however, all the local municipalities in Leeds Grenville reported nil to very limited employment land absorption both overall and within their designated Industrial / Business Parks over the last few years. This conclusion was largely confirmed by the occupied industrial properties analysis described in Section 2.3.

4.3 Potential Employment Areas

In addition to continuing efforts to encourage the absorption of existing underutilized sites, remediating brownfields and servicing viable existing employment area land supply, it is noted that the 2014 PPS permits planning and protection of opportunities for future employment lands beyond the 20 year horizon. This is particularly focused on future employment lands located in proximity to major goods movement (i.e., transportation) facilities and corridors which require those locations. It was also noted that the Leeds and Thousand Islands Official Plan made reference to the possibility of establishing a new business park and localized industrial land supply issues in the northern portion of Elizabethtown-Kitley.

Accordingly, consideration of any future employment land expansion possibilities, in the course of a municipal comprehensive review, should be concentrated near major highway access points, and take advantage of agglomeration opportunities associated with proximity / adjacency to existing employment areas in both Leeds Grenville and the partner municipalities, particularly where transit services may be offered. Additionally, necessary, industrial applications in the rural area should be limited to rural industrial uses and clustered wherever possible with existing rural industrial uses.

It is important also to recognize that Leeds Grenville is strongly positioned to serve markets between the Toronto-Montreal corridors, and to leverage opportunities as Ottawa emerges as a major economy in itself and its own employment areas transition toward higher value, higher order employment uses such as major office and research facilities (Metropolitan Knowledge International, 2008). This is particularly the case for North Grenville along the 416 corridor, but also applies to Edwardsburgh/Cardinal near the 401/416 interchange, port of Johnstown and international bridge, as well as the 401 corridor in Augusta and its closer location to the thousand island bridge connection to Interstate 81. It is also noted that industrial clusters may already be emerging in the latter two employment areas revolving around petrochemical manufacturing and green technologies.

5.0 COMPETITIVE FACTORS & FORCES OF CHANGE

The section describes the primary factors of influence that are anticipated to drive employment area-related employment and land development to 2041.

5.1 Economic Outlook

Canada's real gross domestic product (GDP) decreased by 2.8%, and Ontario's by more than this at 3.2% during the 2008 and 2009 recession. Ontario's manufacturing sector bore the brunt of this decline along with the residential and non-residential construction sectors. While the province's overall economy has since begun to recover, improvement has been slow (Royal Bank of Canada, 2014).

Looking forward, the nation's real GDP, which is adjusted for inflation, is forecast to grow by 2.5%, compared to 2.0% in 2013, in comparison to the United States, which is expected to outperform this rate slightly at 2.8% growth, versus 1.9% in 2013. Recent Canadian trends have already demonstrated improved external trade, with a number of provinces benefiting strongly from increased US demand and a weaker Canadian dollar, which is expected to drop to \$0.87 US (Royal Bank of Canada, 2014).

The strengthening of the US economy is expected to strengthen Canadian growth and Ontario in particular given its close trading ties. Ontario Chamber of Commerce (OCC)(2014) for instance, expects Ontario businesses to increase investment in structures and machinery and equipment, and its municipalities to increase capital spending. Again, however, wider gains in the Province aren't expected to become apparent until 2015.

Growth within Ontario is not expected to be evenly distributed with Toronto and the Kitchener-Waterloo and Barrie regions expected to lead. This is consistent however with historic trends which have seen the west side of the greater golden horseshoe outperformed the areas east of Toronto. Those two regions, according to the Ontario Chamber of Commerce (2014), have 'an industry mix more oriented to growth industries and less dependent on industries facing more difficult market conditions, such as the auto manufacturing or natural resource-based regions'. Indeed, motor vehicle and parts exports were stagnant last year, with a 6% dive in car and truck production in the province. While the outlook for auto manufacturing may improve with the ramping up of the US economy, opportunities for expansion may be found in other products (e.g consumer goods, machinery, building materials) and services (e.g. financial or software services).

On a macroeconomic scale, these trends indicate that Leeds Grenville, and indeed the rest of eastern Ontario are expected to experience a slow but steady recovery, whereas more rapid growth will generally be concentrated west of Toronto in the Province and west of Ontario in the Country. Leeds Grenville may, however, be positioned better than many of comparable municipalities in Eastern Ontario to leverage longer term opportunities in the market area anchored by Montreal and Toronto, as well as the City of Ottawa, now that it is reaching “critical mass” of population that increasingly qualifies it as a third anchor. The City of Ottawa 2008 Employment Land Study Strategy report by Metropolitan Knowledge International indicated that it is possible that Ottawa may exceed its capability to support industrial employment uses as its population-supporting employment needs put pressure on their available serviced employment lands.

5.2 Relevant Forces of Change

5.2.1 Export-related Industry Sectors will continue to Evolve

Over the last two decades, globalization and trade liberalization have created a new environment for companies in advanced economies where significant restructuring of economies has occurred at regional and municipal levels. This trend has resulted in widespread de-industrialization of cities in Europe and North America, particularly of urban cores, as mature, routine, primarily manufacturing activities have been replaced by lower-cost, offshore competitors or relocated to lower-cost jurisdictions. For many cities in advanced economies, this has meant a shift from low-cost to high-value in terms of production. Ultimately, where previously enterprises sought to increase scale of production to minimize costs for competitiveness, the aim now is to produce high quality, innovative and customized products, which translate to competition on value rather than cost.

According to Hemson’s analysis (2014), the structure of the Census Division’s economy shifted significantly between 2006 and 2011. The bulk of the job losses during this period were concentrated in the traditional employment area sectors of manufacturing and transportation and warehousing, while moderate gains were made in professional, scientific and technical services and wholesale trade and small gains were made in utilities and construction. At the same time, however, the Census Division experienced the second highest growth in wholesale trade-related employment relative to its neighbouring jurisdictions over this period. Notwithstanding that sector, which predominantly locates on traditional employment lands, virtually all growth was concentrated in sectors that are predominantly represented by population-related sectors, most significantly in public administration and retail trade and to a lesser extent in finance and insurance, educational services.

Excluding the partner municipalities, sectors in Leeds Grenville which grew included agriculture, forestry, fishing and hunting, retail trade, utilities, public administration, finance and insurance and arts, entertainment and recreation. Of these sectors, only utilities were predominantly found in employment areas. Employment in professional, scientific and technical services remained stable, whereas wholesale trade declined slightly and transportation and warehousing, construction and manufacturing declined significantly.

Taken together, this shift at the Census Division and Leeds Grenville levels away from employment lands-related industry sectors to predominantly population-related sectors is likely to persist on the whole for the foreseeable future. At a more targeted level, however, some industrial employers have chosen to return to domestic operations in recent years motivated by client perception concerns with respect to human and labour rights, production and transportation efficiency, as well as complexities and reliability relating to supply chain logistics. A 2013 Financial Post article by Alexandra Lopez-Pacheco noted, for instance, that risks associated with supply chain and distribution uncertainty in particular are magnified as delivery time expectations shorten with the growth of online retailing channels. Another 2013 article in the Globe and Mail by Barrie McKenna noted, however, that this trend has been more prevalent in the United States than in Canada, and Canadian instances have generally been smaller firms. This trend should not be interpreted, however, as signalling a return to historic manufacturing levels in Ontario.

5.2.2 The Labour Force is Aging & more Mobile

Another important local factor noted in Hemson's report (2014) was that Leeds Grenville is experiencing a demographic shift; the population is aging, in concert with a general out-migration of younger-age cohorts. The advancement of remote technology in healthcare and improved broadband internet, however, may provide an opportunity to shift migration trends by easing pressures on citizens to migrate in order to capitalize on services previously available exclusively in larger centres.

Advances in such technologies play a role in allowing finance and insurance-related jobs to flourish. To take another example, telecommunications and broadband market penetration has resulted in virtually all universities and colleges offering distance education courses that have made it possible to earn post-secondary degrees in situ. This factor was identified as a potential rural economic development opportunity with respect to retaining and attracting human capital, as opposed to focusing solely on employment lands-related development. In addition to enhancing the likelihood of attracting members of the creative class and particularly entrepreneurs to invest in smaller centres, it is noteworthy that attracting even one such entrepreneur could result in an entire family relocating to Leeds Grenville. Indirect effects on the residential population growth would further increase Leeds Grenville's overall economic potential.

5.2.3 Retail Shifts will have Implications on Highway Commercial Demand & Transportation & Warehousing

The broadband and internet revolution has also triggered sea-changes in retailing and transportation and warehousing trends. Frost & Sullivan (2013) have postulated that by 2025, nearly 20% of retail may occur through online channels. This will likely have significant implication on demand for parcel delivery services both in terms volume and frequency, and the nature of warehousing to service the “last mile” operation. More generally with respect to transportation and warehousing, Building-products.com (2011) has written that intermodal transportation, particularly in terms of rail / truck has been trending as the freight industry chases after efficiencies and the regulatory and insurance industries attempt to enhance safety and demand management on roads and highways. It is also notable, with Toronto and Montreal anchoring the main goods movement corridor in Eastern Ontario that Cornwall is emerging as a hub involving distribution centers for larger retail chains such as Shoppers Drug Mart, Wal-Mart and Target.

Related to the rapid growth of online shopping in virtually all goods sectors, Deloitte (2012) has estimated that retail space requirements could decline as much as 30 to 40% in some cases as physical stores transition into digital showrooms, with fewer inventories on display and in stockrooms. Francine Kopun of The Toronto Star (2014) has recently written that Canadian retailers are focusing on reducing their retail backroom space in stores and enhancing efficient use of their showroom space. The growth of this dynamic could pose a significant force of change on the traditional large format retailer. In fact, this factor is thought to have contributed to the decline of music, video, and book stores. Even grocery retailers have been experimenting with smaller formats and online shopping. Amazon has recently entered the Canadian grocery market. Supermarket retailer Yihaodian in China, for instance has announced plans to open thousands of micro / virtual supermarkets where customers can purchase items with their mobile phones and arrange for home delivery (Canadian Grocer, 2012).

5.3 Competitive Factors

Key competitive factors that may influence industrial employment demand, growth and land absorption include the overall land supply balance of Leeds Grenville, its proximity and access to markets (notably Toronto, Montreal, Ottawa and Kingston), the availability of water and wastewater servicing for industrial purposes, the fiscal conditions for industrial development and ensuring that the right labour force is available to attract demand.

Land Supply Balance

Leeds Grenville, and indeed virtually all of Eastern Ontario were oversupplied with respect to industrial lands. The Town of Gananoque prepared an Industrial Park Feasibility Study in August 2012 for instance concluded that ample industrial lands were available within a 100 km radius of Gananoque. The Study further indicated that Kingston, Belleville and Brockville’s industrial and business parks had available and serviced supply for the past 50 years¹. A listing of the most relevant competing employment areas in the surrounding jurisdictions and partner municipalities is provided in Exhibit 25.

Exhibit 25. Key Competing Employment Areas.

Municipality	Name	Description	Serviced	Lands Available
Prescott	Development Drive Business Park	Commercial and industrial uses. Lands intended to be serviced as development progresses.	No	Yes
Prescott	North-West Prescott Industrial Park	Heavy manufacturing.	Yes	Yes
Brockville	John G. Broome Business Park	Established light industrial, warehousing and retail operations, including large format retailers.	Yes	Yes
Brockville	West End Industrial Park	Industrial park with lands available.	Yes	Yes
Smiths Falls	Smiths Falls Industrial Park	Industrial park.	Yes	Yes

While the City of Kingston was undertaking an Industrial Lands Strategy Review (2005) at the time of this report, the previous 2005 City Owned Industrial Land Strategy indicated that the City held between 10 and 20 years of supply (87 ha in the short term and 142 ha in the long-term) itself. Privately-owned industrial land supply in Kingston was estimated to represent an additional 63 ha.

The City of Ottawa’s 2012 Employment Lands Study reported 2,201 ha of vacant industrial and business park lands in 2011, 56% of which was located in urban areas. This supply was anticipated to be sufficient to accommodate demand for 36 years in the City’s urban and 100 years in its rural areas. Ottawa’s update also indicated that the supply would remain sufficient even in the unlikely event that absorption rates doubled, returning to rates experienced during Ottawa’s high-tech boom. While it is true that Ottawa’s does not have any long-term supply issues, as ample unserviced employment areas in that City remain along with ample opportunity to designate new employment lands, the City’s 2008 Employment Lands Study Strategy found that Ottawa’s supply of serviced larger lot supply was constrained in the short to medium term and that its serviced large lot supply opportunities were generally limited on the west side of Ottawa, where historically demand was greatest and infrastructure the most developed.

That Study also determined that higher-order employment area uses (major office) were outcompeting traditional industrial uses near highway and transit accessible locations.

Proximity & Access to Markets

As illustrated in Exhibit 26 (full size version in provided in Appendix D), Leeds Grenville is located within an area that was influenced by the major centres of Toronto (3.5 hours), Ottawa (1 hour), Montreal (2.5 hours) and Syracuse (2.5 hours), as well as the smaller centres of Kingston (1 hour), Cornwall (1.5 hours) and the partner municipalities of Brockville, Gananoque and Prescott (Leeds & Grenville Economic Development Office, 2014). The Highway 401-416 Interchange connects Leeds and Grenville to these major Canadian centres, with Highway 401 linking up with Toronto and Montreal, and Highway 416 connecting with Ottawa to the north.

The Canadian National Railway (CNR) mainline runs east-west at the southern end of the counties, parallel to the St. Lawrence River and Highway 401. The City of Brockville, the largest centre in the counties, is on VIA Rail Canada's main Toronto-Ottawa-Montreal corridor.

The Port of Johnstown (formerly known as the Port of Prescott) is located on the Great Lakes and St. Lawrence Seaway system and provides inland deep-water dockage for shipping and receiving dry bulk cargo such as grain, aggregates and road salt. It is owned and operated by the Corporation of the Township of Edwardsburgh/Cardinal. The port, currently undergoing expansion, is linked to both road and rail networks. It is located in proximity to the Highways 401 and 417 Interchange and is also linked to the Prescott-Ogdensburg International Bridge, in addition to the Toronto-Montreal rail corridor.

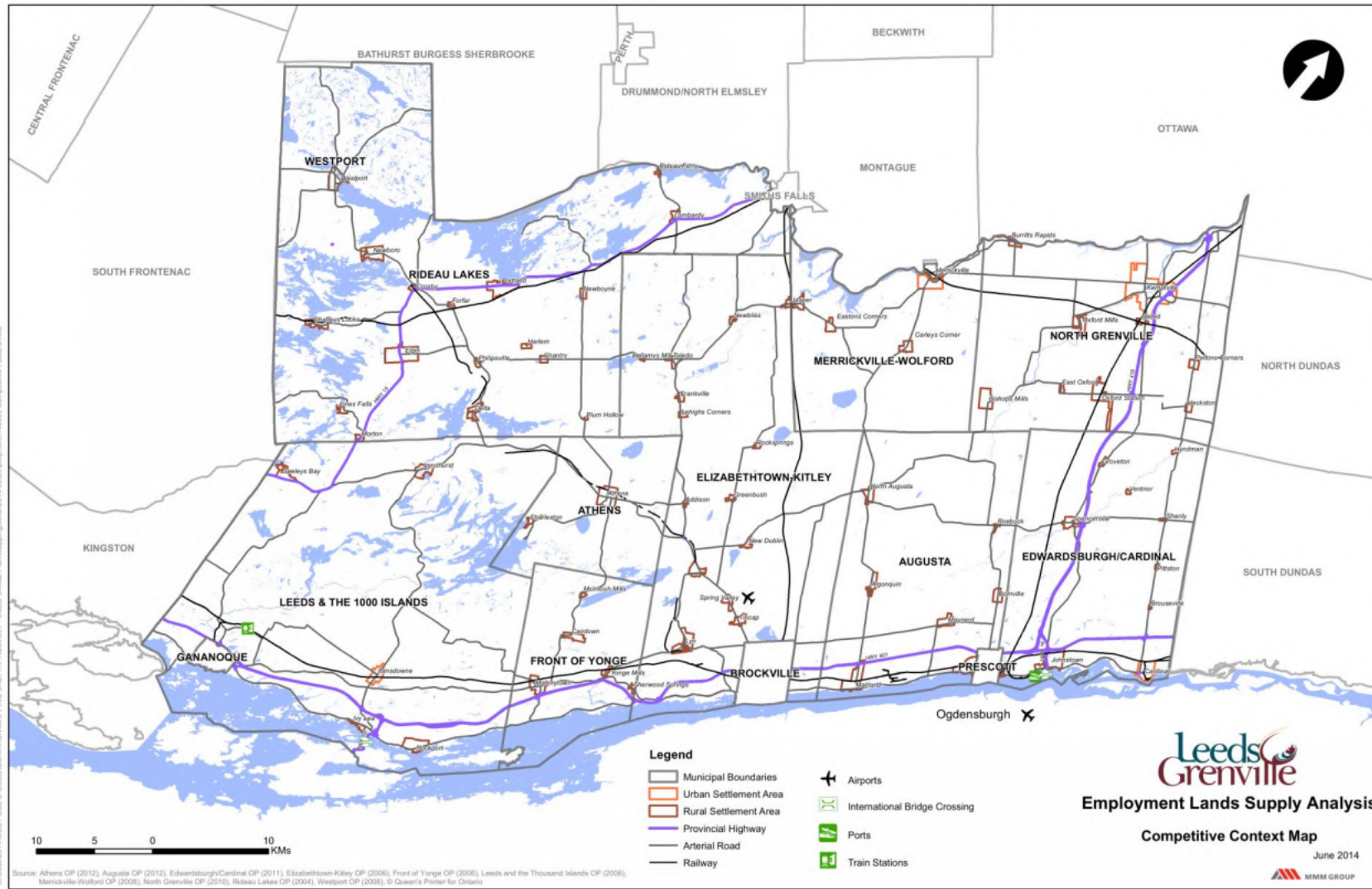
The Thousand Islands Bridge to the United States is also located in Leeds Grenville, near Gananoque. This is particularly advantageous as it provides a direct connection between Highway 401 and Interstate 81. However, it should be noted that while Leeds Grenville is well-connected by rail, road and water, it lacks multi-modal facilities and the more attracting

The Brockville-Thousand Islands Regional Tackaberry Airport is centrally located in Leeds Grenville. The airport can handle both private and commercial aircraft, and is located just north of Brockville on Airport Road in Elizabethtown-Kitley Township. The airport has a 4,500-foot by 90-foot asphalt runway to accommodate modern corporate jet aircraft. It has two highly accurate, satellite-based GNSS (Global Navigation Satellite System or RNAV) and one, ground-based NDB (Non-Directional Beacon) instrument-approach procedure. The airport has medium intensity runway edge lighting, runway approach lighting, turbine fuel, and if required, customs arrangements can be made. Alternatively, Leeds and Grenville has access to the Ottawa International Airport (approx. 100 km to the north), as well as the Ogdensburg Airport in New York State, located near the Prescott-Ogdensburg International Bridge.

Based on the above, the three large employment area clusters located in North Grenville, Edwardsburgh/Cardinal and Augusta are well positioned to serve not just Ottawa but the Montreal / Toronto corridor. Notwithstanding that the economic hotspots in the province will likely remain the Toronto area and the western portion of the Greater Golden Horseshoe within the current planning horizon, these three areas represent vital long term employment area supply of regional significance.

In particular, it is noted that the supply demand balance in Ottawa has generally been transitioning away from traditional industrial uses toward higher order business park uses, particularly at major highway and transit access points, and that its supply of shovel ready employment lands across a competitive lot size range is limited, particularly on the west of side toward Kanata. This ideally positions North Grenville, which is only a 20 minute drive away, to absorb spill over demand.

Exhibit 26. Competitive Context Map.



Servicing Constraints

Although available to the Employment Area clusters in North Grenville, Merrickville-Wolford and Edwardsburgh/Cardinal, servicing (water and wastewater) remains a limiting factor for the remaining clusters. This is essentially a basic requirement for the three regionally significant employment areas. Servicing is available in virtually all the competing employment areas in the neighbouring jurisdictions and the Development Drive Business Park in Prescott is intended to develop with servicing.

Fiscal Conditions Are Competitive

Industrial park lands in the Census Division were found to range between \$5,000 per acre at the low end to \$80,000 per acre in the partner municipalities. According to the Leeds Grenville Economic Development Office (2014), listings in the Johnstown Industrial Park in Edwardsburgh/Cardinal were averaging \$15,000 per acre, which the economic development office has confirmed is competitive with other parks in the competing jurisdictions. Furthermore, the Town of Gananoque's 2012 Industrial Park Feasibility furthermore reported average business park land costs within a 100 km radius of \$52,000 per acre, dropping to \$32,000 if Kingston was excluded. On a broader scale, shovel-ready prices in Eastern Ontario, according to Ontario East Economic Development (2014), range between \$10,000 and \$110,000. Development charge and industrial tax rates in Leeds Grenville are also competitive as illustrated in Exhibit 27 and Exhibit 28. As with many Eastern Ontario municipalities, many of the local municipalities in Leeds Grenville do not apply development charges to Industrial projects.

Leeds Grenville may also benefit from constrained shovel-ready supply in Ottawa and the fact that Ottawa's employment areas are transitioning to higher order employment uses (Metropolitan Knowledge International, 2008). This may result in a regional supply gap for more competitively priced lands with a wider lot size array.

Exhibit 27. Development Charge Rates Comparison.

Comparison Area	Category	Development Charge Rate
Augusta	N/A	Study out for RFP
Edwardsburgh/Cardinal	N/A	No by-law
Elizabethtown-Kitley	0	No charge
Merrickville-Wolford	N/A	No by-law
North Grenville	Industrial	3.06 / ft ²
Westport	NA	No by-law
Brockville	Non-Residential	0.33 / ft ²
Gananoque	NA	No by-law
Prescott	Non-Residential	Proposed 0.94 / ft ²
Ottawa (2013)	Urban Industrial	8.22 / ft ²
Kingston (2013)	Industrial	7.52 / ft ²

Exhibit 28. Industrial Tax Rates Comparison.

Comparison Area	Class	Total Combined Tax Rate
Augusta	Large Industrial Occupied	4.19%
Edwardsburgh/Cardinal	Industrial Taxable: Full	3.34%
Elizabethtown-Kitley	Industrial	3.14%
North Grenville	Industrial	3.19%
	Industrial – New Construction Full	2.86%
Brockville	Industrial	2.61%
Gananoque	Industrial	2.21%
Prescott	Industrial	4.99%
Ottawa (2012)	Full Occupied – Industrial	3.02%
	Large Industrial	2.81%
Kingston (2013)	Industrial	4.29%
Cornwall	Industrial	5.68%

Leeds Grenville Benefit from Access to an Educated & Skilled Labour Pool

While the population of Leeds Grenville is aging and mobile, this mobility works both ways. Existing labour in Leeds Grenville will be more competitive from a wage point of view than Ottawa. At the same time, labour is drawn to jobs. A significant benefit for Leeds Grenville is its proximity to number of post-secondary institutions which can potentially be leveraged to augment the local labour force and provide partnership opportunities for economic development. University of Guelph for instance has a Kemptville Campus. Notable institutions surrounding Leeds Grenville include St. Lawrence College in Brockville and Queen’s University and the Royal Military College in Kingston.

6.0 SUPPLY-DEMAND BALANCE & POTENTIAL LAND NEEDS

Hemson's report (2014) concluded that no additional employment lands were projected to be needed in the 20-year planning horizon in Leeds Grenville and that the existing supply would likely last well beyond that timeframe. It would be advantageous however to ensure that sufficient municipal servicing (municipal water and wastewater) is available in the North Grenville (already serviced), Edwardsburgh/Cardinal (partially serviced) and Augusta (not-serviced municipally) employment area clusters, particularly where lands are strategically located to access major highway corridors.

This report has identified three Industrial / Business park clusters which can accommodate future regionally significant industrial growth as well as three locally significant clusters. These clusters were located in North Grenville, Edwardsburgh/Cardinal and Augusta. The Study has also identified a separate class of supply within the designated Highway Commercial areas of Leeds Grenville, largely spread between Edwardsburgh/Cardinal and North Grenville. While these areas do not protect and prioritize employment lands-related development, they may theoretically absorb additional employment lands-related growth.

7.0 CONCLUSIONS & RECOMMENDATIONS

The Section summarizes the key conclusions drawn from the analysis and regarding the magnitude and nature of employment land demand and supply and the balance between the two in terms of readiness to lever investment. It then identifies future employment lands development opportunities and provides policy recommendations to promote a more sustainable supply-demand dynamic.

7.1 Investment Readiness

Exhibit 29 (full size version provided in Appendix D) shows six designated employment area clusters that were identified within Leeds Grenville, located in five of the ten member municipalities as well as designated Highway Commercial areas. The six employment area clusters were designated specifically in local Official Plans to support and accommodate the majority of clustered industrial growth within those municipalities. Three of these areas were identified by the Study to be of regional significance, whereas the remaining three were identified as locally significant. While additional theoretical employment land supply was also identified in the Highway Commercial areas, these areas are intended primarily to accommodate large lot commercial growth and are not subject to employment land protection policies that would prioritize the creation and reinforcement of conditions necessary to foster PPS employment area growth.

The three regionally significant clusters were identified as they possess the most marketable characteristics in Leeds Grenville in terms of strategic location to transportation infrastructure, available quantity and size profile of developable lands and servicing and adjacency to the partner municipalities. These clusters were located in North Grenville, Edwardsburgh/Cardinal and Augusta. Clusters 1 and 2, North Grenville and Augusta, were considered to be the most marketable and shovel-ready as serviced lands were available. While North Grenville did not have any parcels over 10 ha in size available, the other two regionally significant clusters had a full-range of lot sizes available.

While Clusters 4, 5, and 6, were designated in the local municipal Official Plan as Industrial and Business park, their smaller geographic size and position away from 400-series highways and major market corridors qualified them as locally-oriented rather than likely to accommodate industrial uses of a broader regional significance. That said, it was recognized that Clusters 4 and 5 represent an important corridor connecting Brockville to Smiths Falls and the west side of Ottawa.

Exhibit 30 and Exhibit 31 provide tabular summarizes of total employment area size as well as adjusted vacant land supply remaining in each area. Detailed characterizations of each employment area follow.

Exhibit 29. Identified Clustered & Designated Industrial & Business Parks.

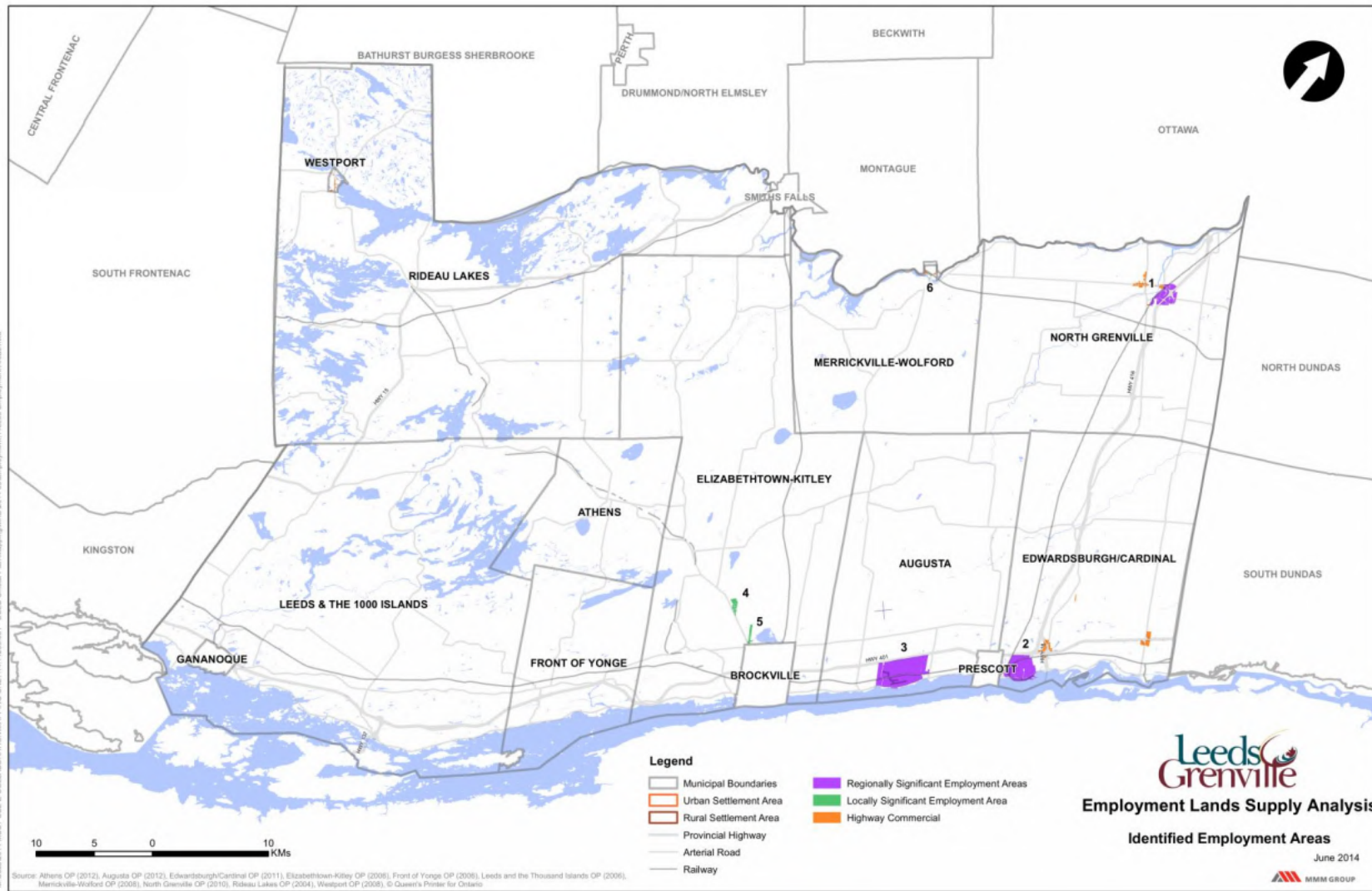


Exhibit 30. Size, Make-up & Adjusted Supply of Clustered & Designated Industrial & Business Parks.

Type	Cluster	Municipality	Total Size (ha)	Total Size Excl. NHC (ha)	Average Parcel Size (ha)	Total Parcels	Adj. Available Supply (ha)	Serviced
Regional	1	North Grenville	204.57	128.71	2.05	100	46.8	Available
Regional	2	Edwardsburgh /Cardinal	465.65	221.60	6.11	74	72.0	Available
Regional	3	Augusta	910.83	495.34	27.60	32	78.5	No
Local	4	Elizabethtown-Kitley	46.25	43.82	1.78	25	18.7	Private
Local	5	Elizabethtown-Kitley	31.28	21.19	1.25	24	0.7	Private
Local	6	Merrickville-Wolford	2.33	2.33	0.21	10	0	Available

Exhibit 31. Size, Make-up & Adjusted Supply of Clustered & Designated Highway Commercial Areas.

Municipality	Total Size (ha)	Remaining Supply Adjusted for Systemic Vacancy (ha)
Edwardsburgh / Cardinal	111	22.3
Merrickville-Wolford	8	1.4
North Grenville	76	11.5
Westport	15	2.2
Total	210	36.7

7.1.1 North Grenville

Cluster 1 was identified as a regionally significant employment area. It is located in North Grenville, in the settlement area of Kemptville. Highway 416 crosses through the middle of the area, which provides connections to the Ottawa area. The Designated area was 204.57 ha in size, which should be sufficient to permit agglomeration effects. The area was designated both Economic Enterprise and Industrial. While approximately 37% of the overall area was affected by natural heritage considerations, 46.8 ha of adjusted supply was identified representing a wide lot size profile with the exception of lots over 10 ha in size. The surrounding land uses include residential to the west and rural to the east. The entirety of the cluster was located within the North Grenville Urban Service Area. Outdoor storage is permitted, if screen appropriately.

North Grenville also had a Highway Commercial designation, separate from the cluster, which was 76 ha in size and permitted limited employment area uses. This Designation had 16 ha of adjusted supply remaining.

7.1.2 Edwardsburgh/Cardinal

Cluster 2 was identified as a regionally significant employment area. It is located in Edwardsburgh/Cardinal along the Saint- Lawrence River, near the settlement area of Johnstown which contains Leeds Grenville deep water port. The smaller settlement of New Wexford was located to the west. The cluster was also located along Highway 401, near the Highway 401 and Highway 416 interchange. Many active and inactive rail corridors traversed the area. To the west of the cluster was the Town of Prescott which was a large center. The cluster was also located in proximity to the Ogdensburg-Prescott International Bridge, providing access to American markets. The cluster was 465.65 ha in overall size, which should be sufficient to permit agglomeration effects. The area was designated as Industrial Park within the Edwardsburgh/Cardinal Official Plan and the surrounding land uses were rural in nature. A key impediment was that approximately 52% of the cluster was affected by natural heritage considerations, however, 72 ha of adjusted supply remain available across a wide lot size profile. Servicing is also available. An existing manufacturing and transportation and warehousing cluster is already located in the cluster, including Greenfield Ethanol, Prysmian Power Cables and Systems Ltd. and Travelers Transportation. Both outdoor storage and large scale retail are permitted.

Johnstown also included a Highway Commercial designation that was approximately 111 ha in overall size, separate from the Industrial Park cluster. This Designation had approximately 30.6 ha of adjusted supply remaining.

7.1.3 Augusta

Cluster 3 was identified as a regionally significant employment area. It is located in Augusta along Highway 401 and the Saint- Lawrence River. The cluster is designated as Industrial District in the Augusta Official Plan. The cluster was centrally located between the City of Brockville and the Town of Prescott. The settlement areas of Riverview Heights and Maitland were located to the East and West of the cluster, respectively. The Designated area was 910.83 ha which should be sufficient to permit agglomeration effects. 41% of the cluster was affected by natural heritage considerations, however, 78.5 ha of adjusted supply remain available across a wide lot size profile over 1 hectare in size. This employment area was not serviced, however, an advanced manufacturing cluster already exists within it, with tenants that include Invsita Canada, Dyno Nobel Nitrogen and Dupont Canada, amongst others. Open storage is permitted.

7.1.4 Elizabethtown-Kitley

Clusters 4 and 5 were identified as locally significant employment areas. They are located in the Township of Elizabethtown-Kitley along County Road 29, which was identified as a growth corridor in the Township's Official Plan connecting to Brockville. The clusters were physically separated by the settlement area of Tincap. Both clusters were designated as Industrial-Business and had primarily industrial uses with some commercial, agricultural and residential uses. Open storage is permitted in this designation.

Cluster 4 was adjacent to the Spring Valley settlement area and a portion of the cluster fell within the Brockville Municipal Airport height restriction limit. The surrounding land uses included natural heritage and rural. Cluster 4 had a total area of 46.25 ha, of which 5% was affected by natural heritage considerations.

Cluster 5 abutted commercial uses to the west and the Mac Johnson Wildlife Area to the East. The total area of that cluster was 31.28 ha, of which 32% was affected by natural heritage considerations. The overall area of both Clusters, even when combined, may pose challenges for encouraging industrial agglomeration effects.

Cluster 4 had approximately 18.7 ha of adjusted supply remaining with limited lot availability, particularly with respect to parcels less than 2 ha in size, while Cluster 5 was essentially built out. Lot development within the cluster was on private well and septic systems. An industrial refrigeration company and the manufacturing company are currently major tenants in Cluster 5.

7.1.5 Merrickville-Wolford

Cluster 6 was identified as a locally significant employment area. It is located in Merrickville-Wolford, in the urban area of Merrickville and is designated as Business Park. The cluster is only 2.33 ha in size. The cluster was not impacted by natural heritage considerations. The land uses within the cluster and surrounding area were predominantly residential. The cluster was located along a rail corridor but no other major transportation routes. As the cluster was located within the urban area, servicing was available. Open storage is not contemplated in the designation, however, the Plan states that Council may consider adopting urban design and landscaping guidelines for this area. The cluster was, however, essentially built out.

Merrickville-Wolford also had a Highway Commercial designation, 8 ha in overall size, which permitted limited employment area uses. This area had approximately 1.8 ha of adjusted supply remaining.

7.1.6 Westport

No employment areas were identified in Westport, however it does have a Highway Commercial designation. This area has only 3.0 ha. of adjusted supply remaining. Westport had initiated a Class EA relating to servicing expansion at the time of the Study.

7.2 Employment Policy Recommendations

Based on the results of the study, the following recommendations have been prepared with respect to enhancing Economic Development and Growth, maintaining a Long Term Employment Land Supply, and responsibly addressing Employment Land Conversion requests and Implementation.

7.2.1 Economic Development & Growth

Supply & Choice

It is recommended that Leeds Grenville ensure that the existing regionally significant employment areas are protected and enhanced to increase their market competitiveness. In particular, it will be important to plan in these areas for an appropriate mix of employment uses to meet Leeds Grenville long-term needs in terms of:

- Developable land availability and cost;
- Developable property size;
- Servicing availability and servicing costs (shovel-ready lands);
- Visibility, privacy / land use compatibility and transportation access;
- Other specialized or sector-specific requirements such as proximity to supporting industries.

It is also recommended that Leeds Grenville plan and protect opportunities for future employment lands beyond the 20 year horizon.

As an economic development action, it is recommended that Leeds Grenville support local municipalities with respect to protecting locally significant employment areas.

Incentivization & Partnership Opportunities

As an economic development action, it is recommended that Leeds Grenville formalize their intentions and actions to identify and leverage municipal incentives, planning tools and partnering opportunities to foster economic development and boost industrial land absorption. It is also recommended that Leeds

Grenville take steps to remain apprised of their competitive context with respect to employment areas and update their fiscal measures with respect to industrial development.

As another economic development action, it is recommended that Leeds Grenville continue to access Provincial and Regional Economic Development Supports such as the Ontario East Economic Development Commission (OEEDC) and the Eastern Ontario Development Program and Eastern Ontario Development Fund.

Marketing & Branding

As an economic development action, it is recommended that Leeds Grenville continue to support and expand the role of the Economic Development office in marketing, web presence and information coordination and delivery. It is suggested that the Office should comprehensively package employment area related information not just for lands within Leeds Grenville but also maintain continuously updated information on recent development, employment area fiscal conditions and departures from the neighbouring jurisdictions.

Permit & Target Desirable Employment-area Supporting Industries

Employment areas permit limited ancillary uses, such restaurants, entertainment facilities and personal services (e.g. dry cleaners and hair dressers) provided that they support and / or complement employment uses. Selected public administration / institutional uses are often also permitted on employment lands provided that they are compatible with the intended employment function of the area. However, as the broader and local economies shift from manufacturing to high-order service industries, the nature of ancillary uses intended to support the primary employment uses in employment areas will evolve. This is particularly important in recognition of the growth in health and social service, education and public administration-related employment in various parts of Eastern Ontario. It is therefore suggested that any ancillary, public administration or institutional use contemplated in an employment area be required to demonstrate that:

- the proposed lands are suitable for the proposed use;
- the proposed use supports and/or complements the primary employment uses within the employment area; and,
- the conversion will have no adverse effects on the function or market viability of the employment area to retain, support and attract employment uses.

As an economic development action, it is recommended that Leeds Grenville orient the majority of their economic development pursuits to retaining major existing employers, leveraging branch expansions from existing employers in the partner municipalities and incubating and attracting new small to medium size companies. It is furthermore recommended that Leeds Grenville explore options for protecting and positioning their employment areas near the partner municipalities and with highway access as local distribution centres for those municipalities.

7.2.2 Long-term Employment Land Supply

Sufficient Land Is Available However Conversion Requests Should Be Resisted

Leeds Grenville has sufficient employment land supply in aggregate terms, however, it is recommended that its viable existing employment lands be protected through the continued application of designated employment area policies and that potential conversion requests be resisted and permitted only under strict and formal evaluation criteria.

To discourage industrial fragmentation and land use incompatibility risks, it is recommended that industrial development in the rural areas should continue to be tied to supporting the rural economy with development consolidated and clustered with existing industrial uses.

While Elizabethtown-Kitley's existing employment clusters are strategically positioned near the Township's boundary with Brockville, it is recommended that Leeds Grenville recognize that additional actions may need to be taken to integrate and link them together. It is furthermore recommended that phasing of clustered employment land availability be contemplated in so far as to ensure that it leverages linkages with Brockville.

Consider Servicing Priorities Comprehensively

It is recommended that Leeds Grenville continue to encourage the remediation of legacy brownfields as well as encourage the take-up of existing underutilized industrial sites to take advantage of existing serviced sites.

Based on their relative desirability in comparison to the other employment clusters after North Grenville, it is recommended that the clusters in Edwardsburgh Cardinal and Augusta be explored as the next priorities for employment area servicing expansions and that joint servicing options are explored with both Prescott and Brockville.

To determine if servicing is warranted, it is suggested that a Municipal Comprehensive Review approach be applied when the need for additional urban lands is identified. PPS 2014 requires that transportation supportive measures be introduced with respect to employment areas. It is therefore recommended that servicing expansions be planned and coordinated to ensure that transit supportive measures are implemented at the same time.

7.2.3 Employment Land Conversion

In growing communities, market forces will seek to convert designated vacant employment lands to other non-employment uses, particularly commercial retail and residential uses. This trend is driven by higher consumer demand, and therefore higher market values for non-employment related development. From a municipal sustainability point of view however, it is necessary to preserve employment lands for employment uses as:

- employment uses are vital to supporting basic or export-oriented jobs and therefore foundational to the economic health of communities;
- the supply of suitable lands capable of supporting these purposes is limited in terms of lot size, infrastructure and transportation conditions and separation from incompatible uses; and,
- the viability of employment areas, and the agglomeration conditions that they require, is highly susceptible to fragmentation as a result of conversion.

It is therefore suggested that a clear policy basis and criteria be established for evaluating conversion applications. Any such application should be required to demonstrate that:

- the proposed lands are suitable for the proposed use
- there is a public need for the proposed use and the that it cannot be accommodated on lands already appropriately designated
- the lands proposed for conversion are currently unsuited for employment purposes and that all practical measures have been undertaken to make them suitable
- the lands are not required over the long-term to support the employment needs for which they are designated; and,
- the conversion will have no adverse effects on the function or market viability of the employment area to retain, support and attract employment uses.

7.2.4 Implementation & Monitoring

It is imperative that future growth trends be consistently monitored by economic development and planning staff to enable evaluation of employment area growth performance. It is recommended that employment land needs be monitored and updated in conjunction with Leeds Grenville five-year OP review.

In particular, it is suggested both to support the above recommendation and as an economic development action recommendation, that Leeds Grenville work with the local municipalities and the partner municipalities to leverage GIS tools to establish the following databases to support continued economic development and planning initiatives:

- Initiate a parcel-specific GIS database inventory of all properties within the designated Industrial and Business Park clusters and the Highway Commercial areas. For occupied parcels, it is suggested to identify all applicable employers and NAICS codes using a relational database and to track the number of employees and the GFA of structures, including the date of construction and condition of buildings on the parcels.
- Establish a building parcel-specific permit tracking GIS database at Leeds Grenville level which will track new construction, demolition, expansion, accessory use in addition to applicable GFA, lot size and application and issuance date.
- Build a parcel-specific GIS database of the number and nature of development enquiries and applications (including status) both inside and outside of employment lands.

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APPENDIX A



A

MPAC
Property Code
Categorization

APPENDIX A – MPAC Property Code Categorization

PROP CODE	PROPCODEDESC	Existing Use
200	Farm property without any buildings/structures	Agricultural
201	Farm with residence - with or without secondary structures; no farm outbuildings	Agricultural
210	Farm without residence - with secondary structures; with farm outbuildings	Agricultural
211	Farm with residence - with or without secondary structures; with farm outbuildings	Agricultural
220	Farm without residence - with commercial/industrial operation	Agricultural
221	Farm with residence - with commercial/industrial operation	Agricultural
222	Farm with a winery	Agricultural
228	Farm with gravel pit	Agricultural
230	Intensive farm operation - without residence	Agricultural
231	Intensive farm operation - with residence	Agricultural
234	Large scale poultry operation	Agricultural
261	Land owned by a non-farmer improved with a non-farm residence with a portion being farmed	Agricultural
262	Land owned by a farmer improved with a non-farm residence with a portion being farmed	Agricultural
381	Mobile home – one or more mobile home on a parcel of land, which is not a mobile home park operation.	Commercial
382	Mobile home park – more than one mobile home on a parcel of land, which is a mobile park operation.	Commercial
383	Bed and breakfast establishment	Commercial
400	Small Office building (generally single tenant or owner occupied under 7,500 s.f.)	Commercial
401	Small Medical/dental building (generally single tenant or owner occupied under 7,500 s.f.)	Commercial
402	Large office building (generally multi - tenanted, over 7,500 s.f.)	Commercial
403	Large medical/dental building (generally multi - tenanted over 7,500 s.f.)	Commercial
405	Office use converted from house	Commercial
407	Retail lumber yard	Commercial
408	Freestanding Beer Store or LCBO - not associated with power or shopping centre	Commercial
409	Retail - one storey, generally over 10,000 s.f.	Commercial
410	Retail - one storey, generally under 10,000 s.f.	Commercial
411	Restaurant - conventional	Commercial

PROP CODE	PROPCODEDESC	Existing Use
412	Restaurant - fast food	Commercial
413	Restaurant - conventional, national chain	Commercial
419	Automotive service centre, highway - 400 series highways	Commercial
420	Automotive fuel station with or without service facilities	Commercial
421	Specialty automotive shop/auto repair/ collision service/car or truck wash	Commercial
422	Auto dealership	Commercial
423	Auto dealership - independent dealer or used vehicles	Commercial
426	Small box shopping centre less than 100,000 s.f. minimum 3 box stores with one anchor (large grocery or discount store)	Commercial
429	Community shopping centre	Commercial
430	Neighbourhood shopping centre - with more than 2 stores attached, under one ownership, without anchor - generally less than 150,000 s.f.	Commercial
432	Banks and similar financial institutions, including credit unions - typically single tenanted, generally less than 7,500 s.f.	Commercial
434	Freestanding supermarket	Commercial
435	Large retail building centre, generally greater than 30,000 s.f.	Commercial
436	Freestanding large retail store, national chain - generally greater than 30,000 s.f.	Commercial
441	Tavern/public house/small hotel	Commercial
445	Limited service hotel	Commercial
450	Motel	Commercial
451	Seasonal motel	Commercial
460	Resort hotel	Commercial
462	Country inns & small inns	Commercial
465	Child and community oriented camp/resort	Commercial
473	Retail with more than one non-retail use	Commercial
477	Retail with office(s) - less than 10,000 s.f., GBA with offices above	Commercial
486	Campground	Commercial
489	Driving range/golf centre - stand alone, not part of a regulation golf course	Commercial
490	Golf course	Commercial
492	Marina - located on waterfront - defined as a commercial facility for the maintenance, storage, service and/or sale of watercraft	Commercial
493	Marina - not located on waterfront - defined as a commercial facility for the maintenance, storage, service and/or sale of watercraft	Commercial
608	Day Care	Commercial
705	Funeral Home	Commercial

PROP CODE	PROPCODEDESC	Existing Use
711	Bowling alley	Commercial
713	Casino	Commercial
715	Racetrack - auto	Commercial
720	Commercial sport complex	Commercial
721	Non-commercial sports complex	Commercial
735	Assembly hall, community hall	Commercial
736	Clubs - private, fraternal	Commercial
805	Post office or depot	Commercial
109	Large land holdings, greater than 1000 acres	Confirm
223	Grain/seed and feed operation	Confirm
360	Rooming or boarding house – rental by room/bedroom , tenant(s) share a kitchen, bathroom and living quarters.	Confirm
363	House-keeping cottages - no American plan – typically a mini resort where you rent a cabin. No package plan available. All activities, meals, etc. are extra.	Confirm
364	House-keeping cottages - less than 50% American plan – typically a mini resort where you rent a cabin and package plans are available. Activities, meals, etc. maybe included.	Confirm
365	Group Home as defined in Claus 240(1) of the Municipal Act, 2001 – a residence licensed or funded under a federal or provincial statute for the accommodation of three to ten persons, exclusive of staff, living under supervision in a single housekeeping un	Confirm
385	Time-share, fee simple	Confirm
102	Conservation Authority land	Excluded
103	Municipal park (excludes Provincial parks, Federal parks, campgrounds)	Excluded
107	Provincial park	Excluded
108	Federal park	Excluded
111	Island under single ownership	Excluded
115	Property in process of redevelopment utilizing existing structure(s)	Excluded
120	Water lot (entirely under water)	Excluded
130	Non-buildable land (walkways, buffer/berm, storm water management pond,etc)	Excluded
134	Land designated and zoned for open space	Excluded
140	Common land	Excluded
221	Farm with residence - with commercial/industrial operation	Excluded
314	Clergy Residence	Excluded
380	Residential common elements condominium corporation – consists only of the common elements not units.	Excluded
406	Retail use converted from house	Excluded

PROP CODE	PROPCODEDESC	Existing Use
480	Surface parking lot - excludes parking facilities that are used in conjunction with another property	Excluded
482	Surface parking lot - used in conjunction with another property	Excluded
495	Communication towers - with or without secondary communication structures	Excluded
496	Communication buildings	Excluded
555	O.P.G. Hydraulic Generating Station	Excluded
558	Hydro One Transformer Station	Excluded
560	MEU Transformer Station	Excluded
561	Hydro One Right-of-Way	Excluded
590	Water treatment/filtration/water towers/pumping station	Excluded
593	Gravel pit, quarry, sand pit	Excluded
597	Railway right-of-way	Excluded
598	Railway buildings and lands described as assessable in the Assessment Act	Excluded
702	Cemetery	Excluded
703	Cemetery with non-internment services	Excluded
718	Exhibition grounds/fair grounds	Excluded
739	Local government airport	Excluded
743	International bridge/tunnel	Excluded
745	Recreational airport	Excluded
749	Public transportation - other	Excluded
510	Heavy manufacturing (non-automotive)	Industrial
519	Foundry	Industrial
520	Standard industrial properties not specifically identified by other industrial Property Codes	Industrial
522	Grain elevators - Great Lakes waterway	Industrial
523	Grain handling - Primary elevators (including feed mills)	Industrial
527	Abattoir/slaughter house/rendering plants	Industrial
528	Food processing plant	Industrial
530	Warehousing	Industrial
531	Mini-warehousing	Industrial
540	Other industrial (all other types not specifically defined)	Industrial
541	Printing plant	Industrial
544	Truck terminal	Industrial
550	Petro-chemical plant	Industrial
563	Private Hydraulic Generating Station	Industrial
565	Private Generating Station (Fossil Fuels and Cogen)	Industrial
580	Industrial mall	Industrial
589	Compressor station - structures and turbines used in	Industrial

PROP CODE	PROPCODEDESC	Existing Use
	connection with transportation and distribution of gas	
591	Sewage treatment/waste pumping/waste disposal	Industrial
592	Dump/transfer station/incineration plant/landfill	Industrial
596	Recycling facility	Industrial
750	Scientific, pharmaceutical, medical research facility (structures predominantly other than office)	Industrial
601	Post secondary education - university, community college, etc	Institutional
605	School (elementary or secondary, including private)	Institutional
610	Other educational institution (e.g. schools for the blind, deaf, special education, training)	Institutional
611	Other institutional residence	Institutional
621	Hospital, private or public	Institutional
625	Nursing home	Institutional
626	Old age/retirement home	Institutional
700	Place of worship - with a clergy residence	Institutional
701	Place of Worship - without a clergy residence	Institutional
710	Recreational sport club - non commercial (excludes golf clubs and ski resorts)	Institutional
730	Museum and/or art gallery	Institutional
731	Library and/or literary institutions	Institutional
810	Fire Hall	Institutional
812	Ambulance Station	Institutional
815	Police Station	Institutional
471	Retail or office with residential unit(s) above or behind - less than 10,000 s.f. gross building area (GBA), street or onsite parking, with 6 or less apartments, older downtown core	Mixed use
472	Retail or office with residential unit(s) above or behind - greater than 10,000 s.f. GBA, street or onsite parking, with 7 or more apartments, older downtown core	Mixed use
125	Residential development land.	Residential
244	Managed forest property, residence not on water	Residential
245	Managed forest property, residence on water	Residential
301	Single family detached (not on water)	Residential
302	More than one structure used for residential purposes with at least one of the structures occupied permanently	Residential
303	Residence with a commercial unit	Residential
304	Residence with a commercial/ industrial use building	Residential
306	Boathouse with residence above	Residential
309	Freehold Townhouse/Row house – more than two units in a row with separate ownership	Residential
311	Semi-detached residential – two residential homes sharing a common center wall with separate ownership.	Residential

PROP CODE	PROPCODEDESC	Existing Use
313	Single family detached on water – year round residence	Residential
322	Semi-detached residence with both units under one ownership – two residential homes sharing a common center wall.	Residential
332	Typically a Duplex – residential structure with two self-contained units.	Residential
333	Residential property with three self-contained units	Residential
334	Residential property with four self-contained units	Residential
335	Residential property with five self-contained units	Residential
336	Residential property with six self-contained units	Residential
340	Multi-residential, with 7 or more self-contained units (excludes row-housing)	Residential
350	Row housing, with three to six units under single ownership	Residential
352	Row housing, with seven or more units under single ownership	Residential
242	Managed forest property, seasonal residence not on water	Seasonal Residential
243	Managed forest property, seasonal residence on water	Seasonal Residential
391	Seasonal/recreational dwelling - first tier on water	Seasonal Residential
392	Seasonal/recreational dwelling - second tier to water	Seasonal Residential
395	Seasonal/recreational dwelling - not located on water	Seasonal Residential
100	Vacant residential land not on water	Vacant
101	Second tier vacant lot – refers to location not being directly on the water but one row back from the water	Vacant
105	Vacant commercial land	Vacant
106	Vacant industrial land	Vacant
110	Vacant residential/recreational land on water	Vacant
112	Multi-residential vacant land	Vacant
113	Condominium development land - residential (vacant lot)	Vacant
240	Managed forest property, vacant land not on water	Vacant
241	Managed forest property, vacant land on water	Vacant
260	Vacant residential/commercial/ industrial land owned by a non-farmer with a portion being farmed	Vacant

APPENDIX B



B

Size Profiles,
Occupied
Clustered
Industrial
Parcels

Appendix B – Size Profiles

Occupied Industrial Parcels in Clustered Employment Areas

Leeds Grenville	Ha		Parcels		Average Ha
<1	19	2%	36	53%	0.5
1-2	14	2%	10	15%	1.4
2-5	26	3%	9	13%	2.9
5-10	34	4%	5	7%	6.9
>10	813	90%	8	12%	101.6
Total / Average	906	100%	68	100%	13.3

North Grenville	Ha		Parcels		Average Ha
<1	4	8	57%		0.5
1-2	3	2	14%		1.5
2-5	6	2	14%		2.9
5-10	13	2	14%		6.6
>10			0%		
Total / Average	26	14	100%		1.9

Augusta	Ha		Parcels		Average Ha
<1	0	1	14%		0.4
1-2			0%		
2-5			0%		
5-10	14	2	29%		7.1
>10	570	4	57%		142.5
Total / Average	585	7	100%		83.5

Elizabethtown-Kitley	Ha		Parcels		Average Ha
<1	12	23	70%		0.5
1-2	7	5	15%		1.3
2-5	11	4	12%		2.7
5-10	7	1	3%		6.9
>10			0%		
Total / Average	37	33	100%		1.1

Edwardsburgh/Cardinal	Ha		Parcels		Average Ha
<1	2	3	25%		0.5
1-2	3	2	17%		1.3
2-5	9	3	25%		3.1
5-10			0%		
>10	243	4	33%		60.7
Total / Average	256	12	100%		21.4

Merrickville-Wolford	Ha		Parcels		Average Ha
<1	0	1	0%		0.3
1-2	2	1	100%		1.6
2-5			0%		
5-10			0%		
>10			0%		
Total / Average	2	2	100%		1.0

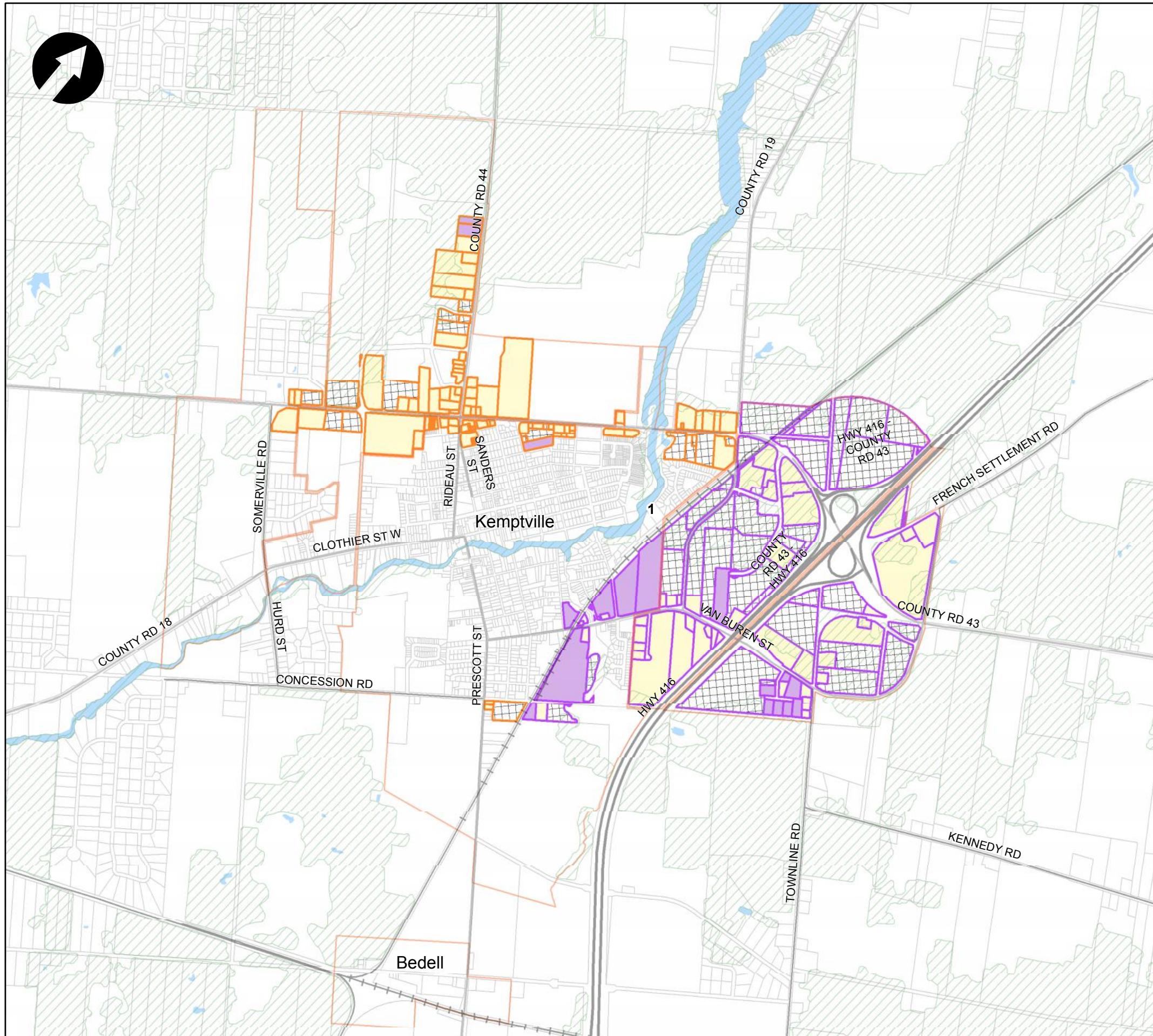
APPENDIX C



C

Employment
Area Land
Supply Maps

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Employment Area Supply

Township of North Grenville

Legend

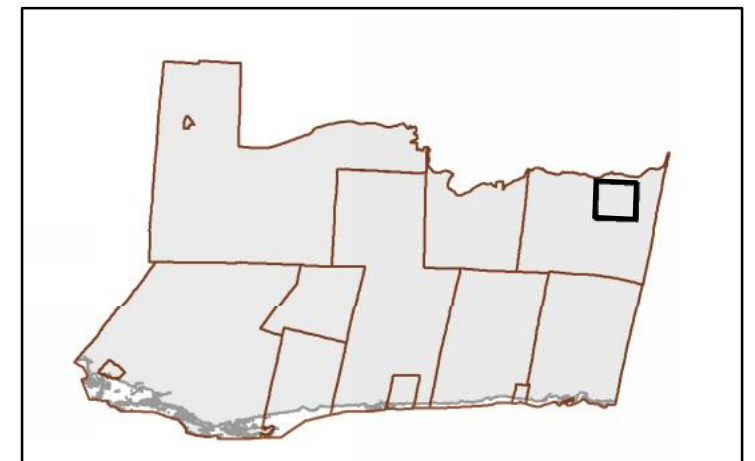
- Municipal Boundaries
- Settlement Area
- Collector
- Provincial Highway
- Arterial Road
- Railway
- Natural Heritage Consideration

Employment Areas

- Regionally Significant Employment Areas
- Locally Significant Employment Area
- Highway Commercial

Tax Assessment Code

- Occupied Industrial
- Occupied Other Uses
- Vacant
- Excluded



Employment Lands Supply Analysis

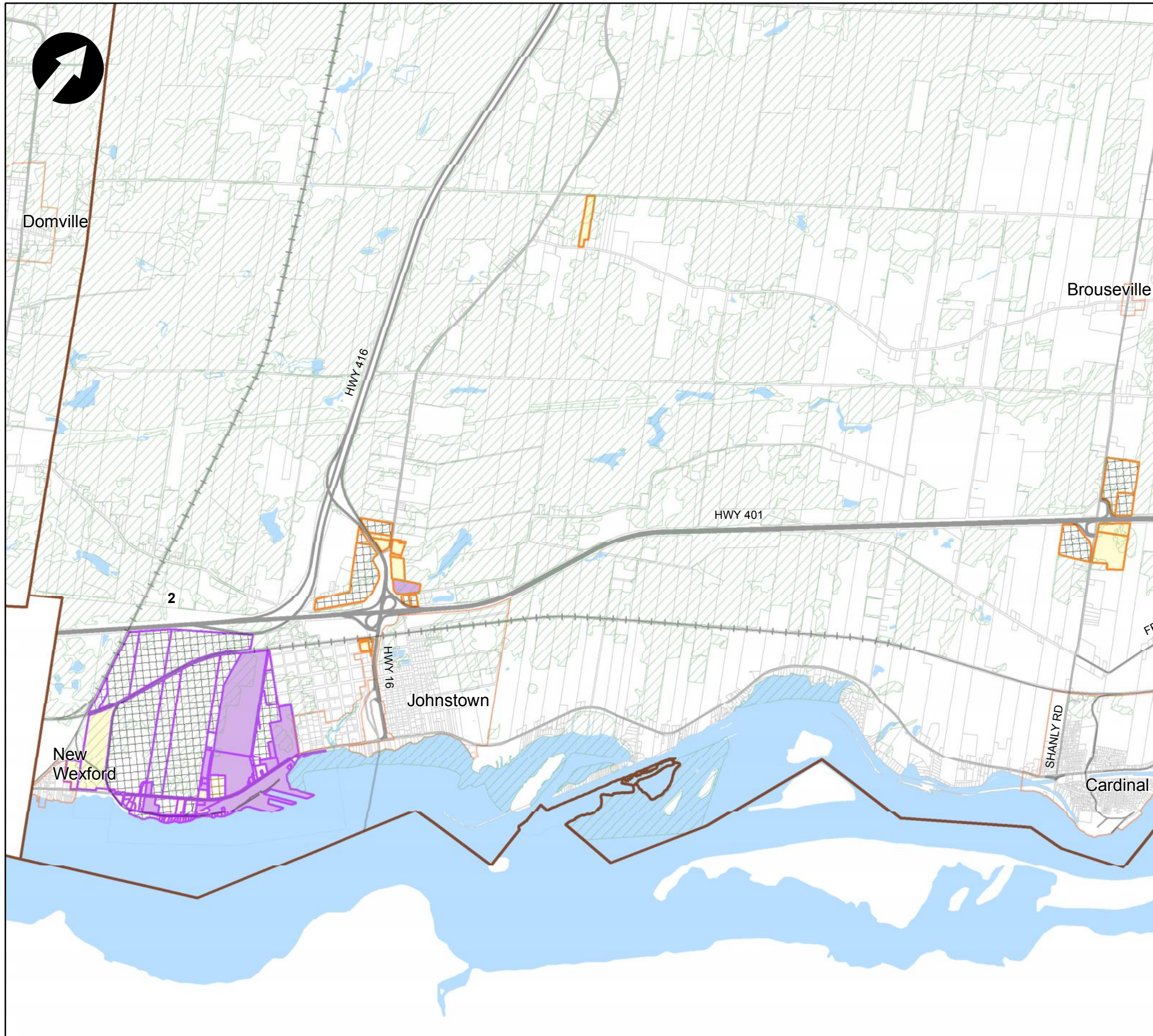
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Employment Area Supply

Township of Edwardsburgh/Cardinal

Legend

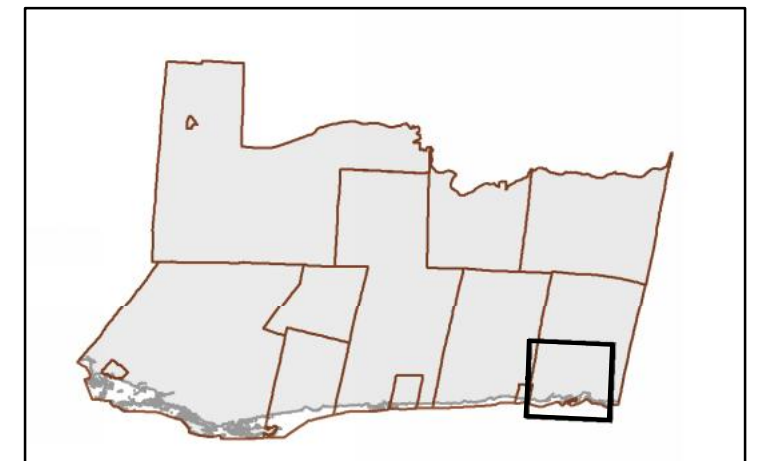
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- Collector
- Provincial Highway
- Arterial Road
- Railway
- Natural Heritage Consideration

Employment Areas

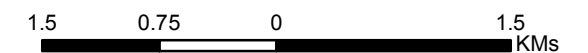
- Regionally Significant Employment Areas
- Locally Significant Employment Area
- Highway Commercial

Tax Assessment Code

- Occupied Industrial
- Occupied Other Uses
- Vacant
- Excluded



Employment Lands Supply Analysis

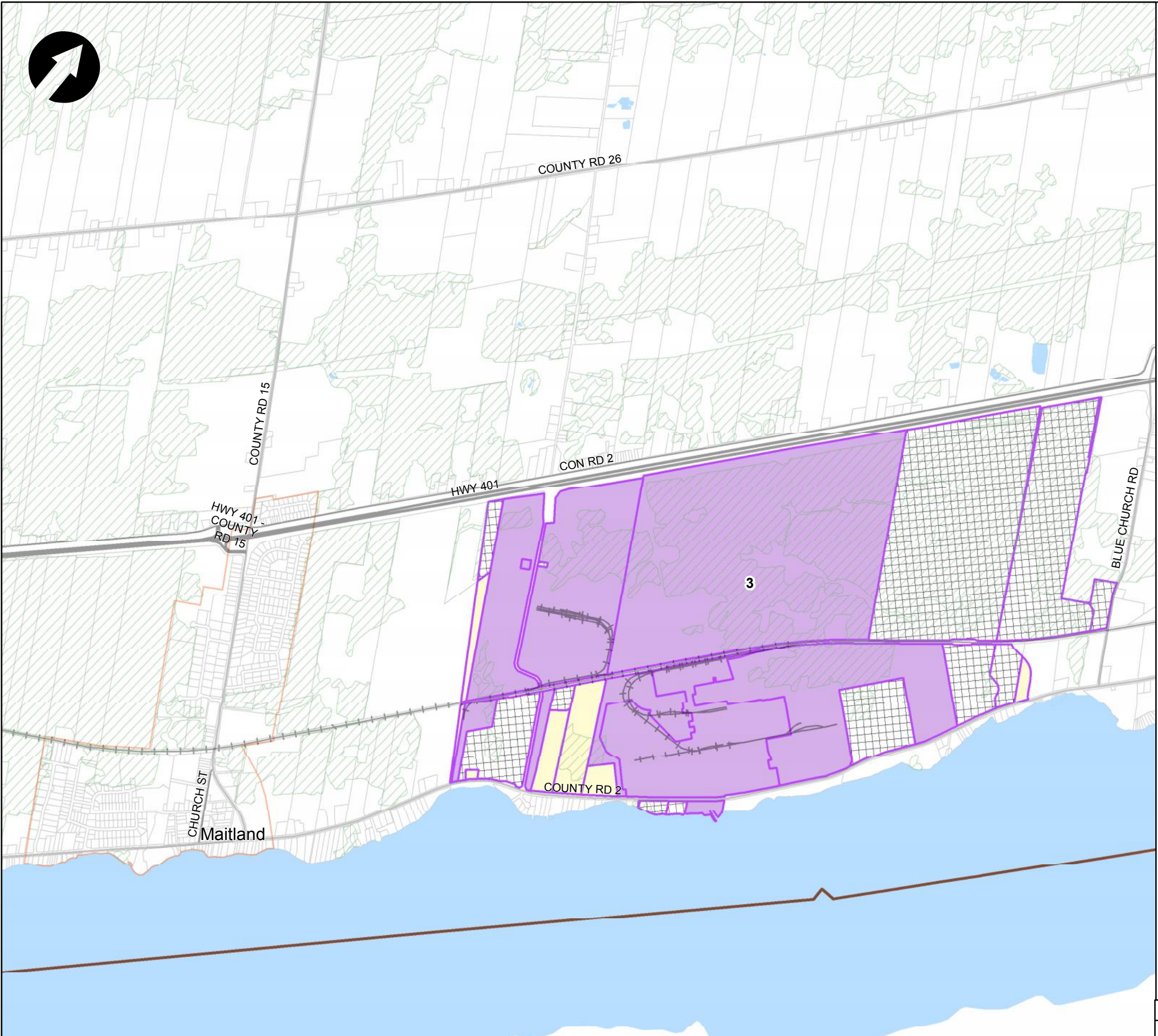


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Employment Area Supply

Township of Augusta

Legend

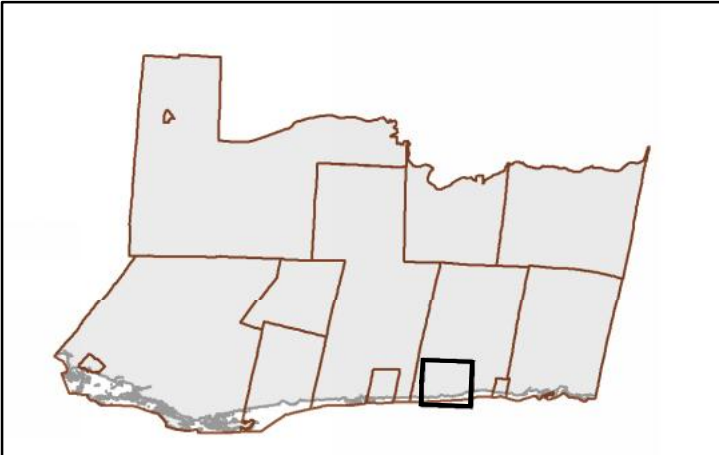
- Municipal Boundaries
- Settlement Area
- Collector
- Provincial Highway
- Arterial Road
- Railway
- Natural Heritage Consideration

Employment Areas

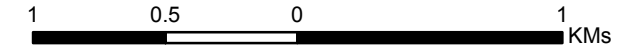
- Regionally Significant Employment Areas
- Locally Significant Employment Area
- Highway Commercial

Tax Assessment Code

- Occupied Industrial
- Occupied Other Uses
- Vacant
- Excluded



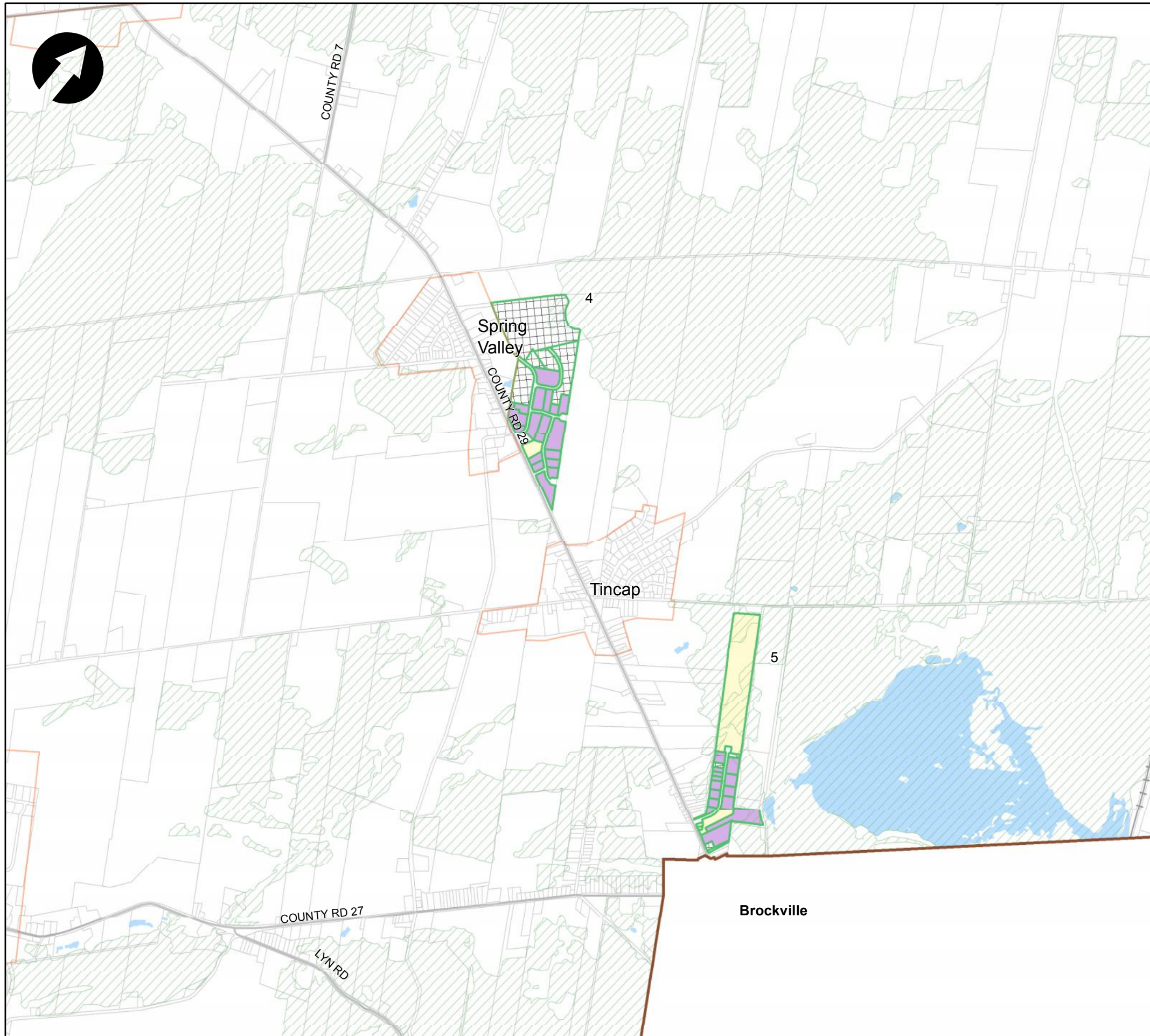
Employment Lands Supply Analysis



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Employment Area Supply

Township of Elizabethtown-Kitley

Legend

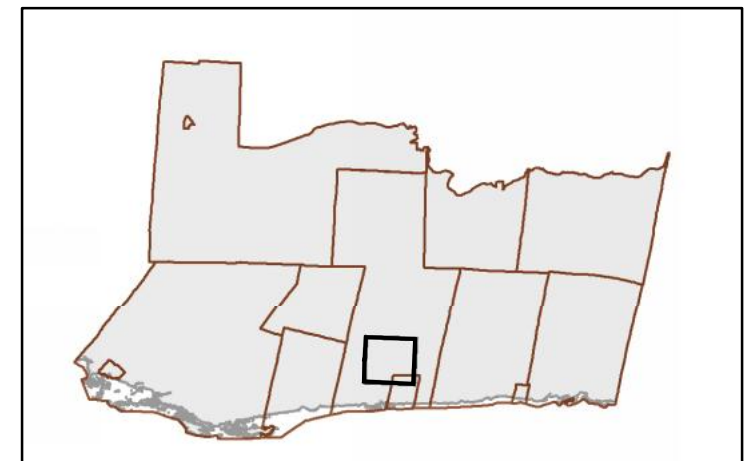
- Municipal Boundaries
- Settlement Area
- Collector
- Provincial Highway
- Arterial Road
- Railway
- Natural Heritage Consideration

Employment Areas

- Regionally Significant Employment Areas
- Locally Significant Employment Area
- Highway Commercial

Tax Assessment Code

- Occupied Industrial
- Occupied Other Uses
- Vacant
- Excluded



Employment Lands Supply Analysis

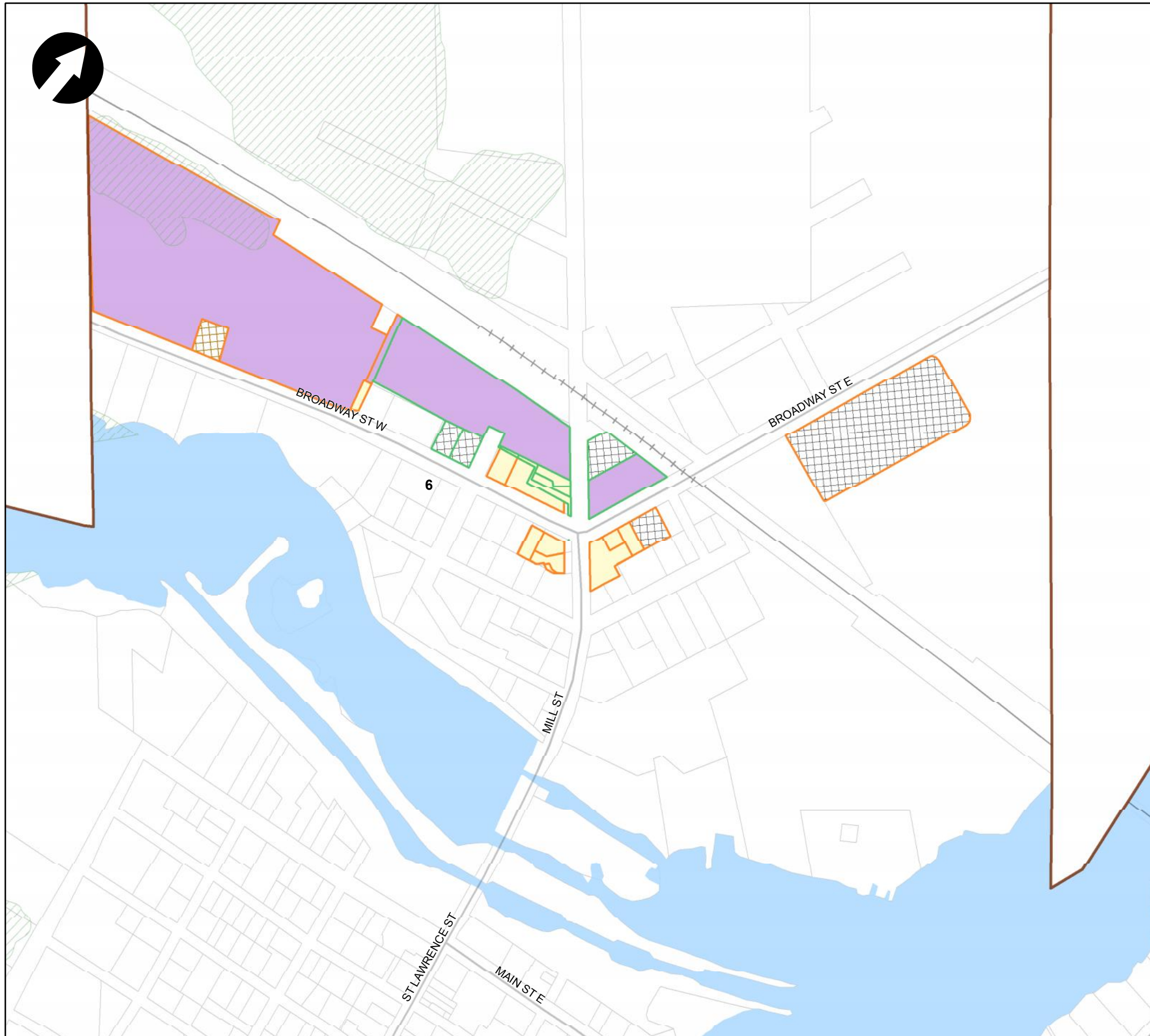


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Employment Area Supply

Township of Merrickville-Wolford

Legend

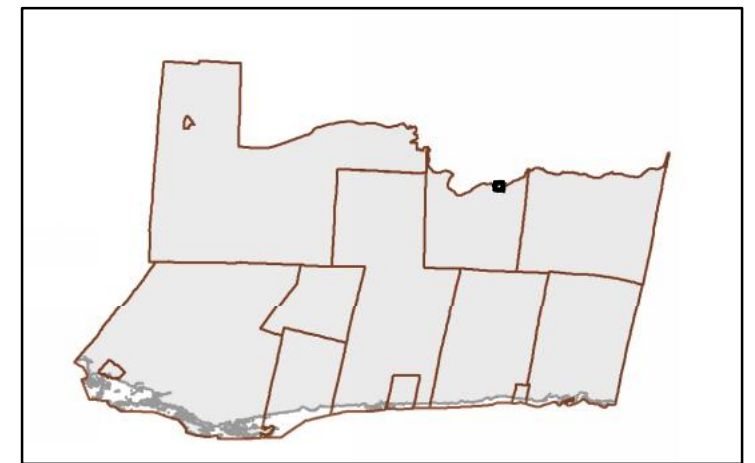
- Municipal Boundaries
- Settlement Area
- Collector
- Provincial Highway
- Arterial Road
- Railway
- Natural Heritage Consideration

Employment Areas

- Regionally Significant Employment Areas
- Locally Significant Employment Area
- Highway Commercial

Tax Assessment Code

- Occupied Industrial
- Occupied Other Uses
- Vacant
- Excluded



Employment Lands Supply Analysis

0.15 0.075 0 0.15 KMs

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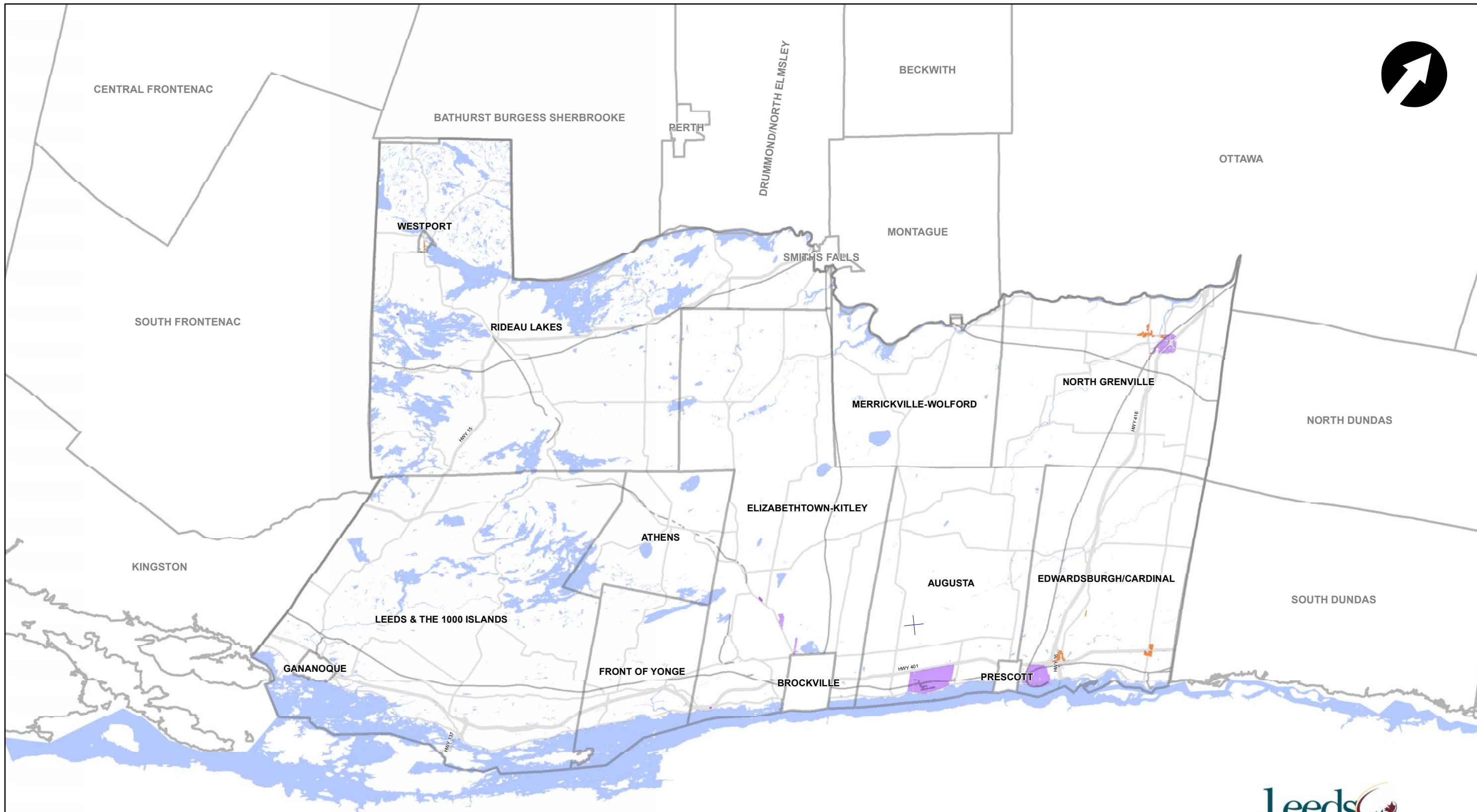


APPENDIX D



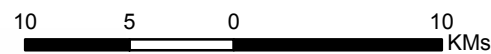
D

Full Size
Maps (Exhibits
5, 26 & 29)



Legend

-  Municipal Boundaries
-  Urban Settlement Area
-  Rural Settlement Area
-  Provincial Highway
-  Arterial Road
-  Railway
-  Clustering Industrial/Business Park
-  Isolated Industrial/Business
-  Highway Commercial



Employment Lands Supply Analysis

Designated Employment Lands

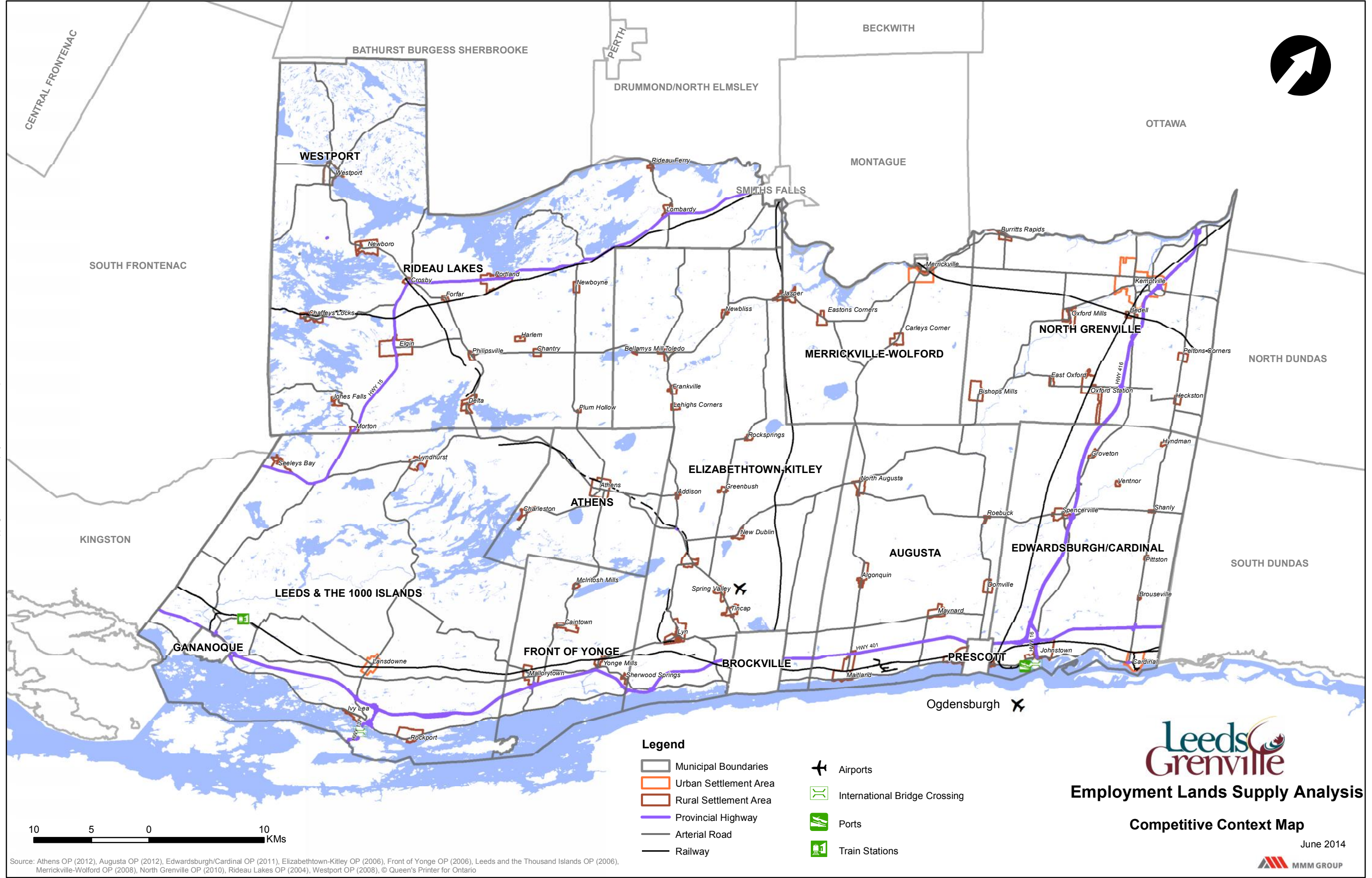
June 2014



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Source: Athens OP (2012), Augusta OP (2012), Edwardsburgh/Cardinal OP (2011), Elizabethtown-Kitley OP (2006), Front of Yonge OP (2006), Leeds and the Thousand Islands OP (2006), Merrickville-Wolford OP (2008), North Grenville OP (2010), Rideau Lakes OP (2004), Westport OP (2008), © Queen's Printer for Ontario

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Legend

- Municipal Boundaries
- Urban Settlement Area
- Rural Settlement Area
- Provincial Highway
- Arterial Road
- Railway
- Airports
- International Bridge Crossing
- Ports
- Train Stations

**Leeds
Grenville**

Employment Lands Supply Analysis

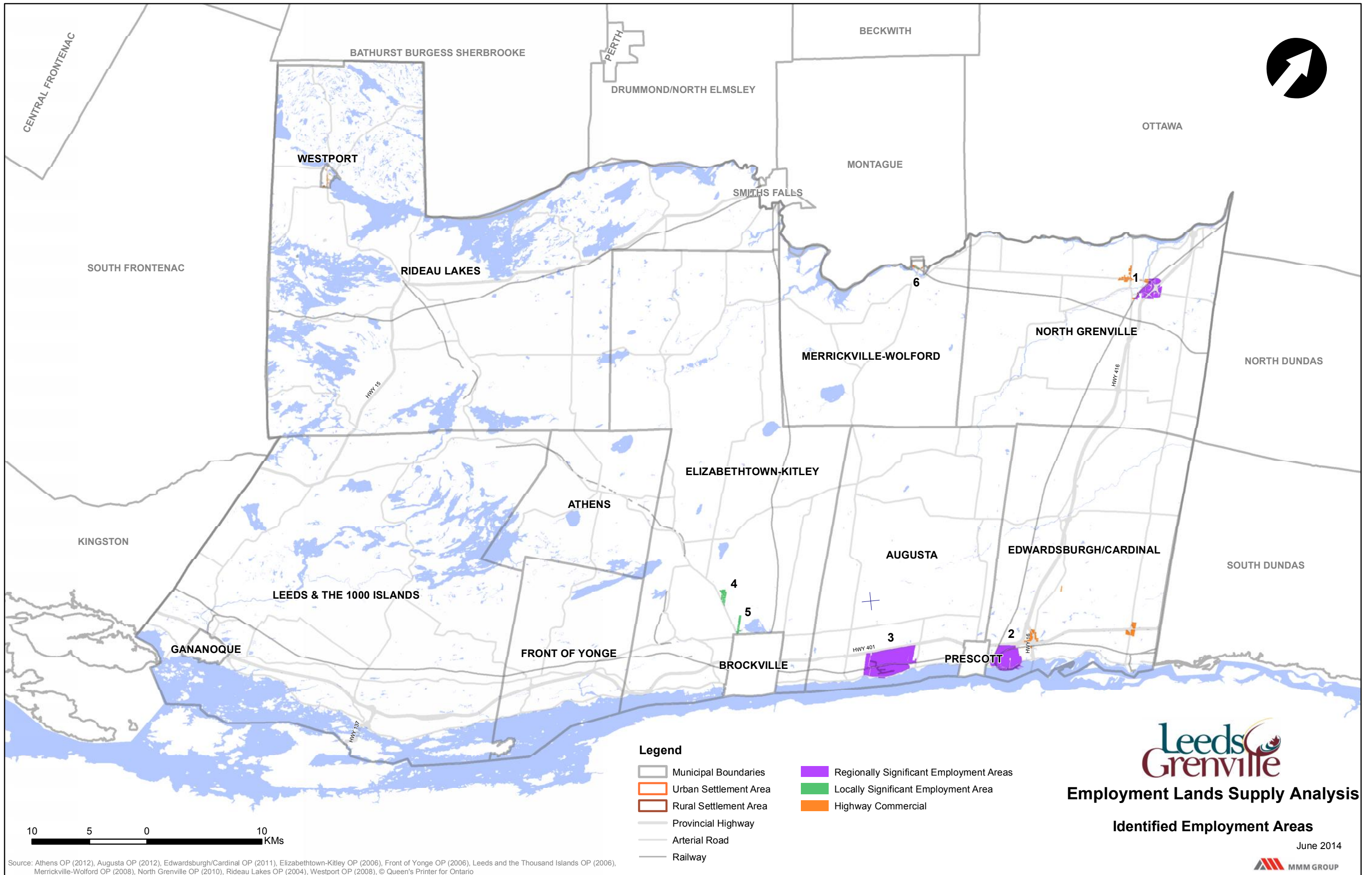
Competitive Context Map

June 2014












Source: Athens OP (2012), Augusta OP (2012), Edwardsburgh/Cardinal OP (2011), Elizabethtown-Kitley OP (2006), Front of Yonge OP (2006), Leeds and the Thousand Islands OP (2006), Merrickville-Wolford OP (2008), North Grenville OP (2010), Rideau Lakes OP (2004), Westport OP (2008), © Queen's Printer for Ontario

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Legend

-  Municipal Boundaries
-  Urban Settlement Area
-  Rural Settlement Area
-  Provincial Highway
-  Arterial Road
-  Railway
-  Regionally Significant Employment Areas
-  Locally Significant Employment Area
-  Highway Commercial



Employment Lands Supply Analysis

Identified Employment Areas

June 2014



Source: Athens OP (2012), Augusta OP (2012), Edwardsburgh/Cardinal OP (2011), Elizabethtown-Kitley OP (2006), Front of Yonge OP (2006), Leeds and the Thousand Islands OP (2006), Merrickville-Wolford OP (2008), North Grenville OP (2010), Rideau Lakes OP (2004), Westport OP (2008), © Queen's Printer for Ontario