



METRO VANCOUVER 2015  
**Industrial Lands Inventory**  
Summary Report



# ABOUT METRO VANCOUVER

Metro Vancouver (the Greater Vancouver Regional District) operates under provincial legislation as a regional district and three greater boards to deliver regional services, policy, and political leadership on behalf of 23 local authorities. These local authorities comprise 21 municipalities, one treaty First Nation, and one electoral area.

Metro Vancouver's regional growth strategy is one plan among a suite of interconnected management plans developed around Metro Vancouver's Sustainability Framework. *Metro Vancouver 2040: Shaping our Future (Metro 2040)* provides land use policies to guide the future development of the region and to support the efficient provision of transportation, regional infrastructure and community services.



METRO VANCOUVER REGION



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# 1 KEY FINDINGS

The Metro Vancouver 2015 Industrial Lands Inventory ('the 2015 Inventory') provides a comprehensive look at the quantity and quality of industrial lands in the Metro Vancouver region as of mid-2015. It provides information about the amount of land that is developed for industrial activities and identifies industrial lands that are vacant, types of industrial activities, and other land characteristics.

The 2015 Inventory supports *Metro Vancouver 2040: Shaping our Future (Metro 2040)* goals by providing information to support the protection of industrial lands, promote industrial intensification, and inform future policy development and implementation.

The key findings associated with the 2015 Inventory are:

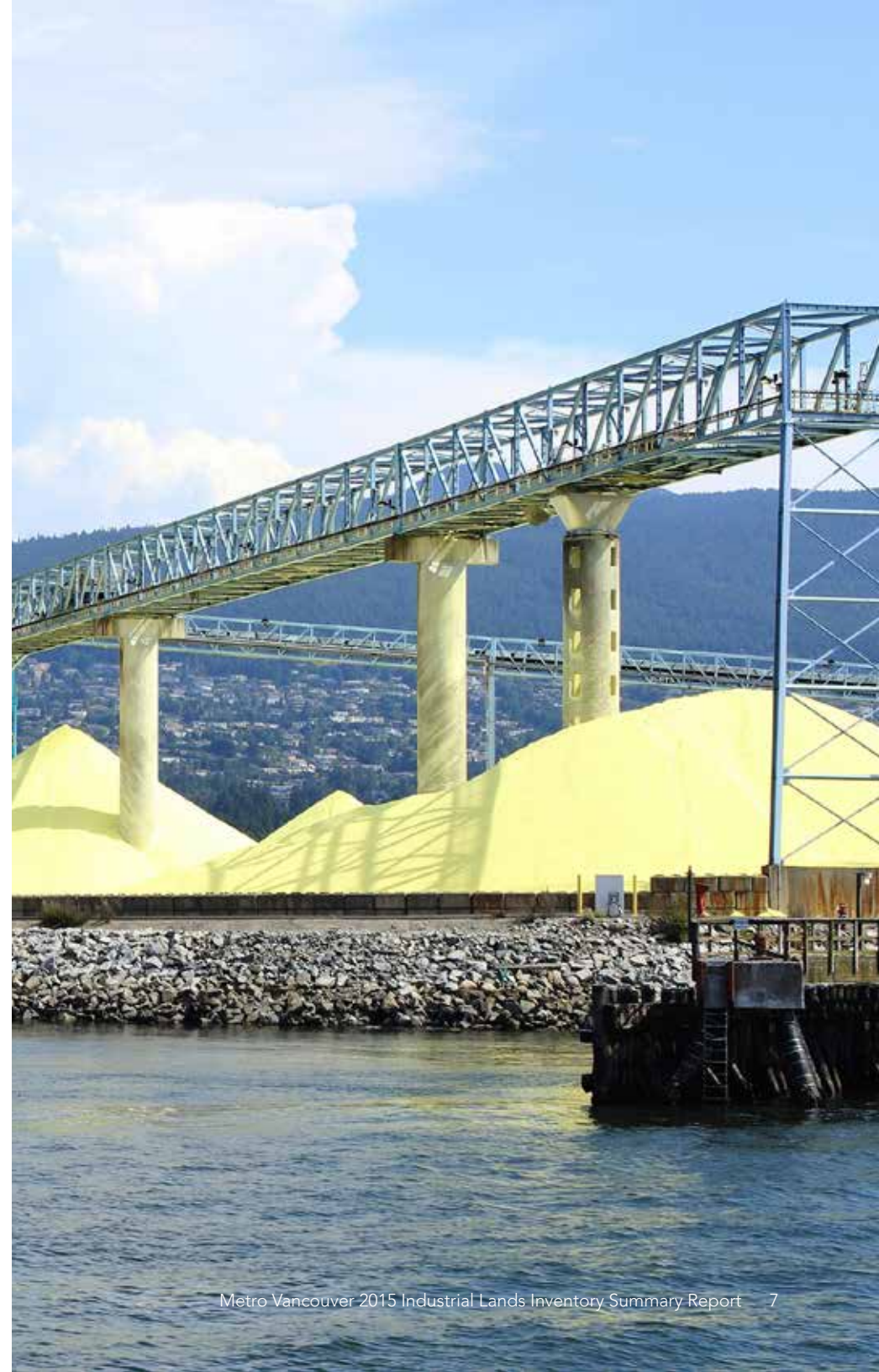
- **A notable amount of industrial lands are used for non-industrial purposes - Conversion of industrial lands can occur through re-designation or non-industrial uses.**  
Some municipal plans include 'mixed employment' designations and zones that permit a wide range of industrial and commercial uses, which allow for more non-industrial uses in industrial areas, such as retail, office, and other commercial.
- **The conversion of industrial lands continues - From 2010 to 2015, there was a net reduction of 350 ha (865 ac) of industrial lands.**  
This conversion of land continues to reduce opportunities for industrial development and industrial business expansion, with economic, employment, and taxation implications for the Metro Vancouver region.
- **Industrial lands secured for long-term protection - Municipal policies (land use designations and zoning) and regional land use designations secure long-term industrial use of industrial lands.**  
Lands that have both regional and municipal Industrial land use designations, as well as Industrial zoning, effectively have the greatest protection from conversion to other uses in the long-term.
- **Competing priorities for lands – Metro 2040 includes other long range regional planning goals, such as accommodating population and employment growth, focusing commercial and housing development in Urban Centres, protecting agricultural and environmental lands, and supporting sustainable transportation forms.**  
Because of these multiple goals and objectives, there are in some cases competing or even conflicting policy priorities.
- **Short-term intensification potential is limited on lands that are fully utilized – 93% of lands classified as 'General Industrial', which make up nearly half (47%) of the 2015 Inventory, are mostly 'fully utilized'.**  
Most of these lands are substantially used, with limited immediate opportunity for redevelopment and intensification. Nevertheless, as these lands redevelop over the medium and long term, there will be potential to densify and intensify.

- Potential extension of lifespan of available vacant lands - The net land absorption was 380 ha (939 ac), or 76 ha (188 ac) per year on average over the 2010-2015 period.

Using a theoretical absorption forecast model (measure of industrial lands developed per year), the vacant land supply might be substantially absorbed by the 2030s.

- Few available large sites for 'trade enabling' logistics uses - namely large sites close to transportation infrastructure to allow for efficient truck trips (drayage) in the region.

In some cases, abutting smaller properties could be consolidated and redeveloped in order to create larger sites for larger tenants.



## 2 INDUSTRIAL LANDS IN METRO VANCOUVER

Industrial lands are required to support a prosperous and growing regional economy and workforce, as well as trade and transportation functions that serve Western Canada. Given the ongoing pressure to convert industrial lands to other uses and the limited industrial land base, protecting the region's industrial land supply is imperative to accommodate the growing economy and employment.

As a result, Metro Vancouver, through the regional federation, included regional land use designations in *Metro Vancouver 2040: Shaping our Future (Metro 2040)* to protect industrial lands (i.e. Industrial and Mixed Employment), as well as policies to encourage industrial intensification and support efficient goods movement infrastructure to serve industry.

*Metro 2040* provides a policy response to a number of growth management challenges, including the need to ensure an adequate supply of space for industry and commerce. The 2015 Inventory supports *Metro 2040* goals by providing information to support the protection of industrial lands, promote industrial intensification, and inform future policy development and implementation.

Of the 23 jurisdictions in the region, only 16 have industrial lands. There are 9 geographic sub-regions in Metro Vancouver used for the purposes of reporting the Industrial Lands Inventory.

### Industrial Lands Development Potential

Industrial lands are not all equally viable for different types of industrial users. There are various constraints that can affect the development capacity of industrial lands, including, for example, location and site features.

Some sites have site-specific constraints or pre-existing uses that may make it difficult to (re)develop with industrial uses. Additionally, environmental constraints and natural hazards may reduce the amount of land that is potentially developable for industrial uses. Other constraints include location, established non-industrial uses, the availability of needed infrastructure for development, ownership patterns affecting land assembly, and smaller sites that may not be adequate for certain types of industrial development.

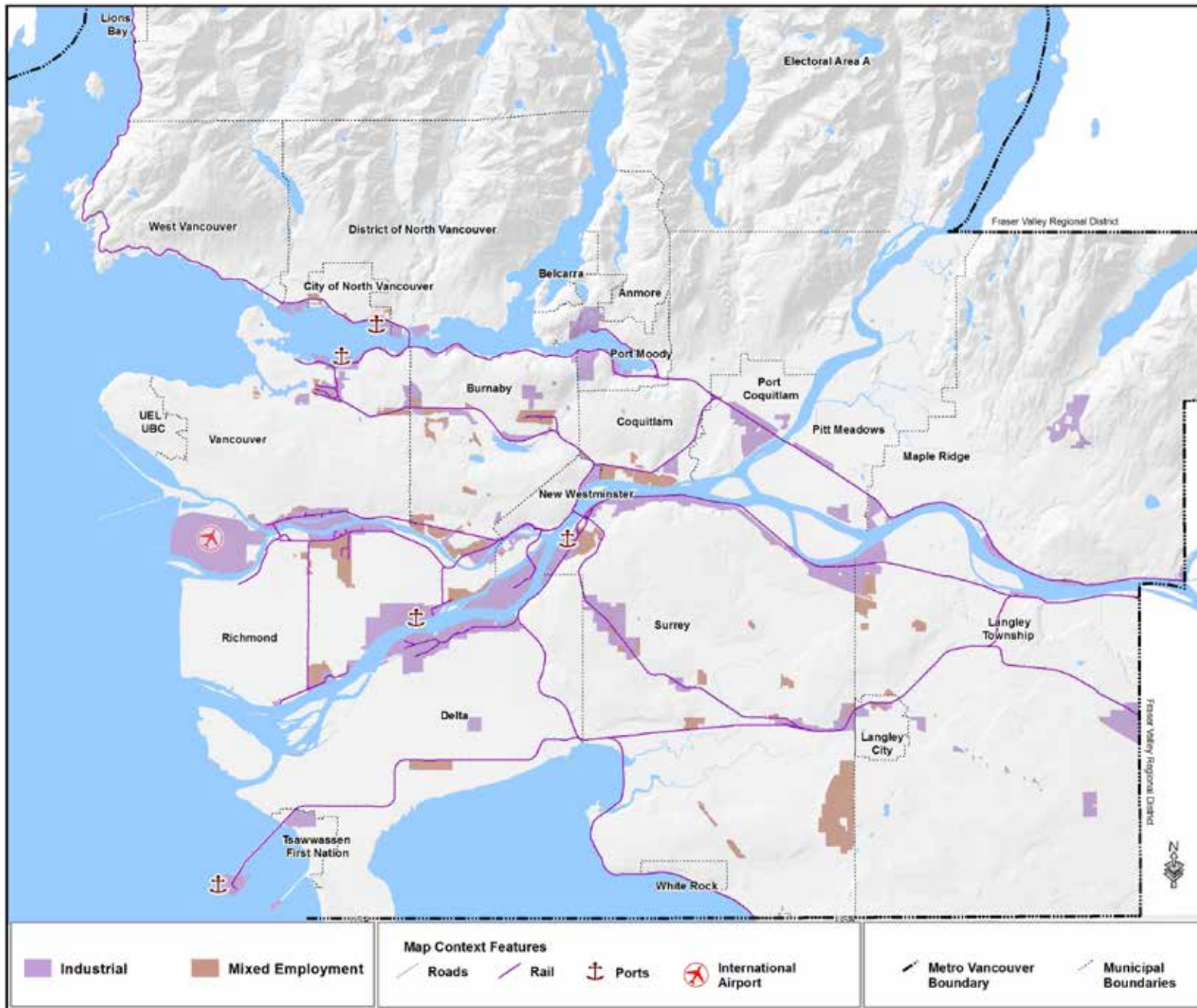
Accordingly, it is important to note that the lands inventoried and amounts reported are **gross** areas; various types of constraints or limitations as noted will reduce the **net** developable amount of land.

Some industries are better able to locate in a wider range of locations, whereas other industries must have direct and reliable access to transportation infrastructure and other features. For businesses involved in trade, transportation, and logistics, proximity to highways, port terminals, and rail yards is of vital importance. Accordingly, poorly located industrial lands are not an option for these types of users.

Also of note, some industrial lands may have legal / tenure or use limitations, such as lands owned by the airport authority which are restricted to airport related uses or port lands restricted to port related activities, but can still accommodate some forms of industry.

Further, because of site constraints, as well as location and market factors, some lands may not be developed for some time. All of these factors will affect the potential for the industrial land supply to meet demand.

# METRO 2040 INDUSTRIAL AND MIXED EMPLOYMENT DESIGNATED AREAS



### 3 METRO VANCOUVER 2015 INDUSTRIAL LANDS INVENTORY

The 2015 Inventory provides a comprehensive picture of the amount and type of developed and vacant industrial lands in the region. It contains detailed information about the quantity, utilization, status, and characteristics of the industrial lands in Metro Vancouver as of mid-2015.

The 2015 Inventory allows for a comparison with past inventories (2005 and 2010, as revised) to track change over time, land development / absorption patterns, and to inform the basis for potential further study of industrial lands, such as the market readiness of 'Vacant' lands and re-development and / or intensification potential of 'Developed' lands.

The purpose of the 2015 Inventory is to improve the understanding of the different types of industrial lands and uses, and inform decision-makers and further policy work.

Specifically, the objectives of the 2015 Inventory are to:

- provide information about the Metro Vancouver region's supply of industrial lands;
- illustrate changes between the 2005, 2010, and 2015 Inventories;
- inform dialogue and policies about industrial lands in the region;
- support further actions to advance industrial lands protection and intensification potential; and
- inform regional planning performance measuring and reporting.

The 2015 Inventory can inform regional and municipal planning processes, as well as infrastructure investments by agencies and private sector business decisions, for example, through supporting:

- the refinement of municipal and regional industrial plans and policies;
- municipal zoning bylaws;
- preparation of area plans and employment projections;
- development of tools to encourage the development and intensification of industrial lands;
- the development community about available industrial lands; and
- appropriate economic and employment growth.

The 'universe' or scope of lands included in the Industrial Lands Inventory are all lands that are municipally designated industrial (Official Community Plans, sub-area / neighbourhood plans, or equivalent), plus lands that are both zoned (or equivalent) industrial and used for industry, as of the date of the Inventory (See Appendix 1). There are smaller-scale industrial activities occurring on other lands not included.



## LAND USE CLASSIFICATIONS

### Classification of Lands in the Industrial Lands Inventory

The 2015 Inventory includes 24 detailed land use classifications (See Appendix 2). Past inventories were limited to either classifying land as either 'Developed' or 'Vacant'; the 24 classifications provide a much better understanding of the uses occurring on industrial lands. The lands were classified according to their predominant use in order to provide a detailed understanding of the industrial lands supply.

The types of uses range from industrial, to quasi-industrial, to non-industrial uses. Some non-industrial uses are not likely to redevelop to industrial (such as retail), whereas other land uses are likely to redevelop to industrial over the long term (e.g. vacant, agriculture, residential, and resource extraction).



TOTAL LAND INVENTORY	DEVELOPED LANDS	<b>Building – Intensive Industrial</b>
		1. General Industrial
		<b>Land-intensive Industrial</b>
		2. Industrial – Outdoor Storage
		3. Other Infrastructure- Maintenance Yards/Emergency Services
		<b>Large-Scale Infrastructure/Transportation</b>
		4. Other infrastructure – Utilities
		5. Other infrastructure – Oil Tank Farm
		6. Transportation Infrastructure – Rail Yards
		7. Transportation Infrastructure – YVR Airside/Groundside Developed
	8. Transportation Infrastructure – Port Terminal Developed	
	9. Transportation Infrastructure – Other	
	10. Transportation Infrastructure – Parking	
	NON-INDUSTRIAL USE	<b>Retail Uses</b>
		11. Non-Industrial – Retail (big box)
		12. Non-Industrial – Retail (small or medium-scale)
		13. Non-Industrial – Retail (car/trailer dealerships)
		<b>Other Commercial Uses</b>
14. Non-Industrial – Office		
15. Non-Industrial – Media Production		
16. Non-Industrial – Banquet Hall/Assembly		
17. Non-Industrial – Education/Training		
18. Non-Industrial – Indoor Recreation		
VACANT LANDS	<b>Other Uses/Vacant</b>	
	19. Non-Industrial – Agriculture	
	20. Non-Industrial – Residential	
	21. Industrial – Resource Extraction	
	22. Transportation Infrastructure – YVR Airside/Groundside Vacant	
	23. Transportation Infrastructure – Port Terminal Vacant	
24. Vacant Land		

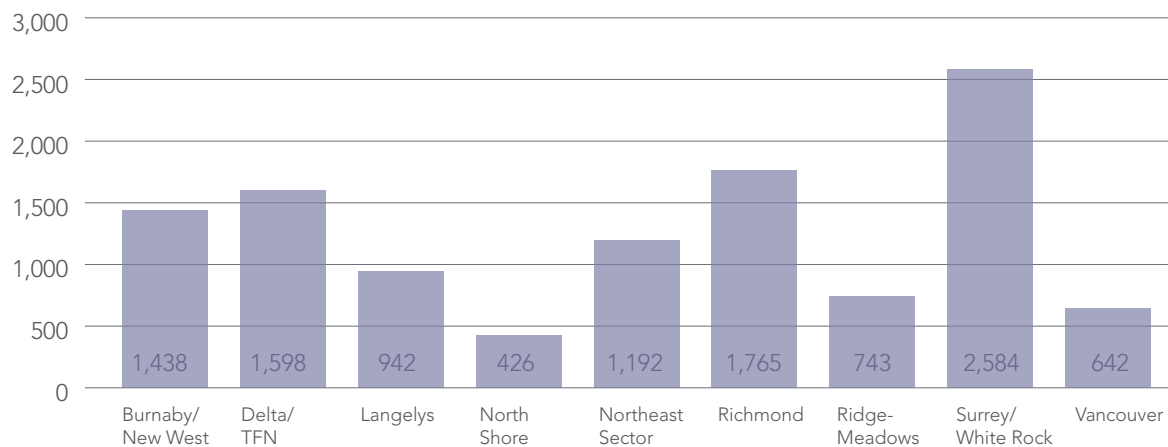
## 4 INDUSTRIAL LANDS INVENTORY HIGHLIGHTS

The 2015 Inventory data was analyzed in several ways: by geography (regional, sub-regional, municipal), land use classification (detailed, consolidated), regulatory overlay (regional designation, municipal designation, municipal zoning), and ownership (private, public, other).

Highlights are as follows:

- The Metro Vancouver region has 11,331 hectares (28,000 acres) of industrial lands, of which 80% (9,071 ha / 22,414 ac) were 'Developed' and 20% (2,261 ha / 5,586 ac) 'Vacant'. Most of the lands in the 2015 Inventory are located in municipalities in the southern and eastern parts of the region: 23% in Surrey, 16% in Richmond, and 14% in Delta / Tsawwassen First Nation.
- In terms of vacant land, 3% is used for 'Resource Extraction', 2% for 'Residential', 1% for 'Agriculture', and 11% is undeveloped or fully vacant. These lands will serve as the future supply of industrial lands. However, only 20% of 'Vacant' industrial lands are on sites larger than 20 ha (50 ac). The available site size impacts the types of industrial users that can be accommodated.
- Nearly half (47%) of industrial lands are categorized within the 2015 Inventory as 'General Industrial'. These lands have a range of industrial uses that are typically building-intensive, along with associated accessory uses. Almost all of these lands (93%) are 'fully utilized' (80-100% utilized), which means that there are limited immediate opportunities for intensification given the current building form and use. Nevertheless, as these lands redevelop over the medium and long term, there will be potential to densify and intensify.

DISTRIBUTION OF INDUSTRIAL LANDS BY SUB-REGION (HA)



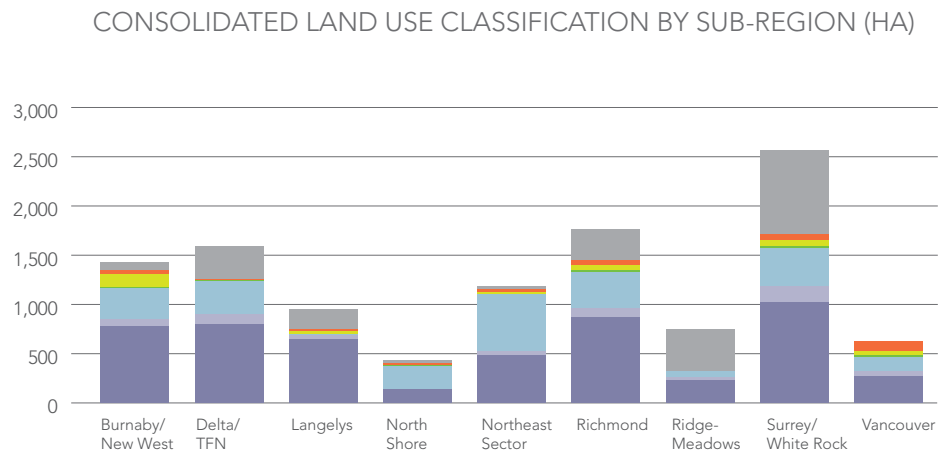
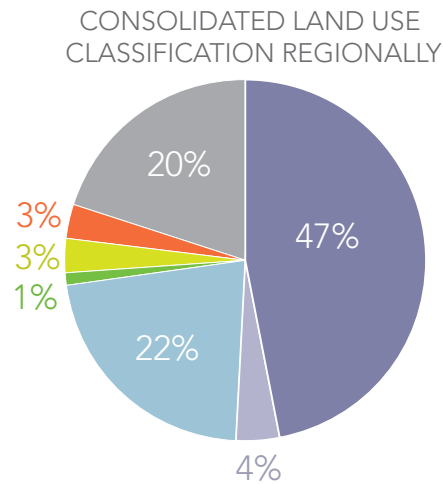
- In terms of other land use classifications, 12% of industrial lands are used for transportation infrastructure (port, airport, rail), and an additional 10% for 'non-market' industrial functions such as 'Utilities' and 'Oil Tank Farms'. The 2015 Inventory also includes lands with non-industrial uses such as 'Retail' (3%) and 'Commercial' (3%).
- Protection for industrial lands in the region varies, with 91% of the 2015 Inventory regionally designated as either 'Industrial' (68%) or 'Mixed Employment' (23%) in *Metro 2040*. At the municipal level, 79% is both zoned and designated Industrial. Of the developed industrial lands, most are protected with both municipal Industrial designation and zoning. These designations help secure the long-term industrial use of the lands.



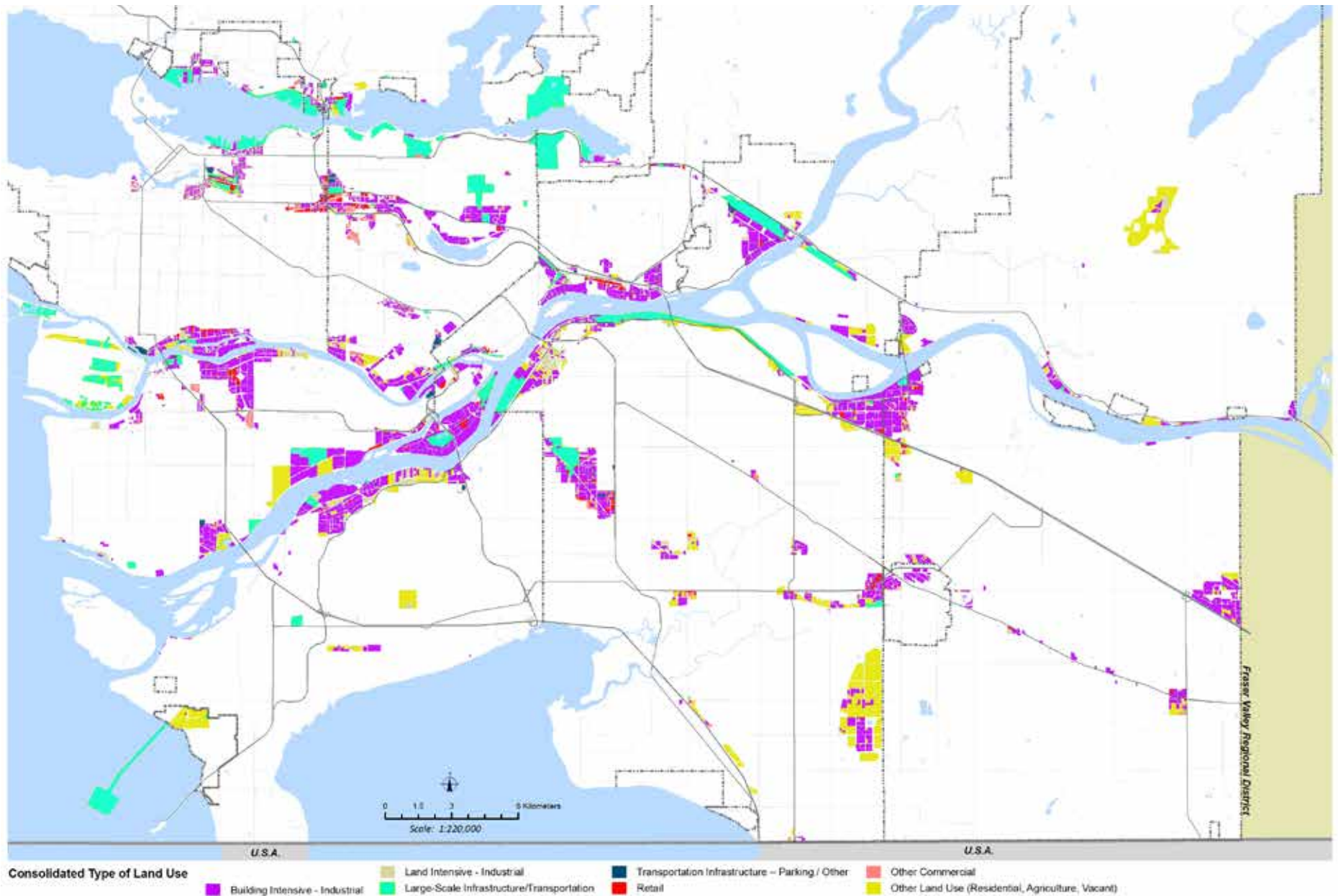
## Consolidated Land Use Classifications

The 24 detailed land use classifications (see page 11) have been consolidated into 7 broader classifications for clarity and reporting purposes. The largest category is 'Building Intensive – General Industrial', at 47%, followed by 'Large Scale Infrastructure / Transportation', at 22%. Lands used primarily for non-market industrial uses, including 'Retail' and 'Commercial', each make up 3%.

The following figures and map show the consolidated land use classifications for the region. Nearly half of the 2015 Inventory is 'General Industrial', shown as dark purple, mostly located in the major industrial areas.



# CONSOLIDATED LAND USE CLASSIFICATIONS



## 5 DEVELOPED AND VACANT INDUSTRIAL LANDS

The 11,331 hectares (28,000 acres) of land in the 2015 Inventory can be rolled up from the 24 land use classifications into the two categories of 'Developed' and 'Vacant' to enable comparison to past inventories.

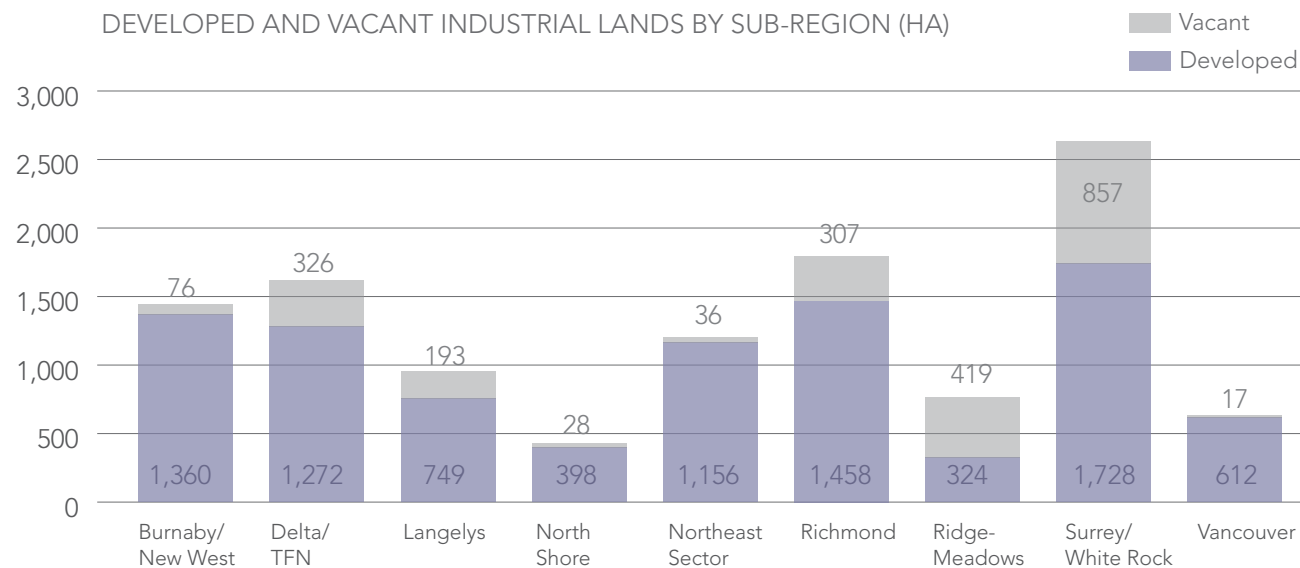
- There are 9,071 hectares (22,414 acres) of 'Developed' industrial lands in the region that make up 80% of the total 2015 Inventory.
- There are 2,261 hectares (5,586 acres) of 'Vacant' industrial lands in the region that make up 20% of the total 2015 Inventory.

'Developed' and 'Vacant' lands are defined as follows:

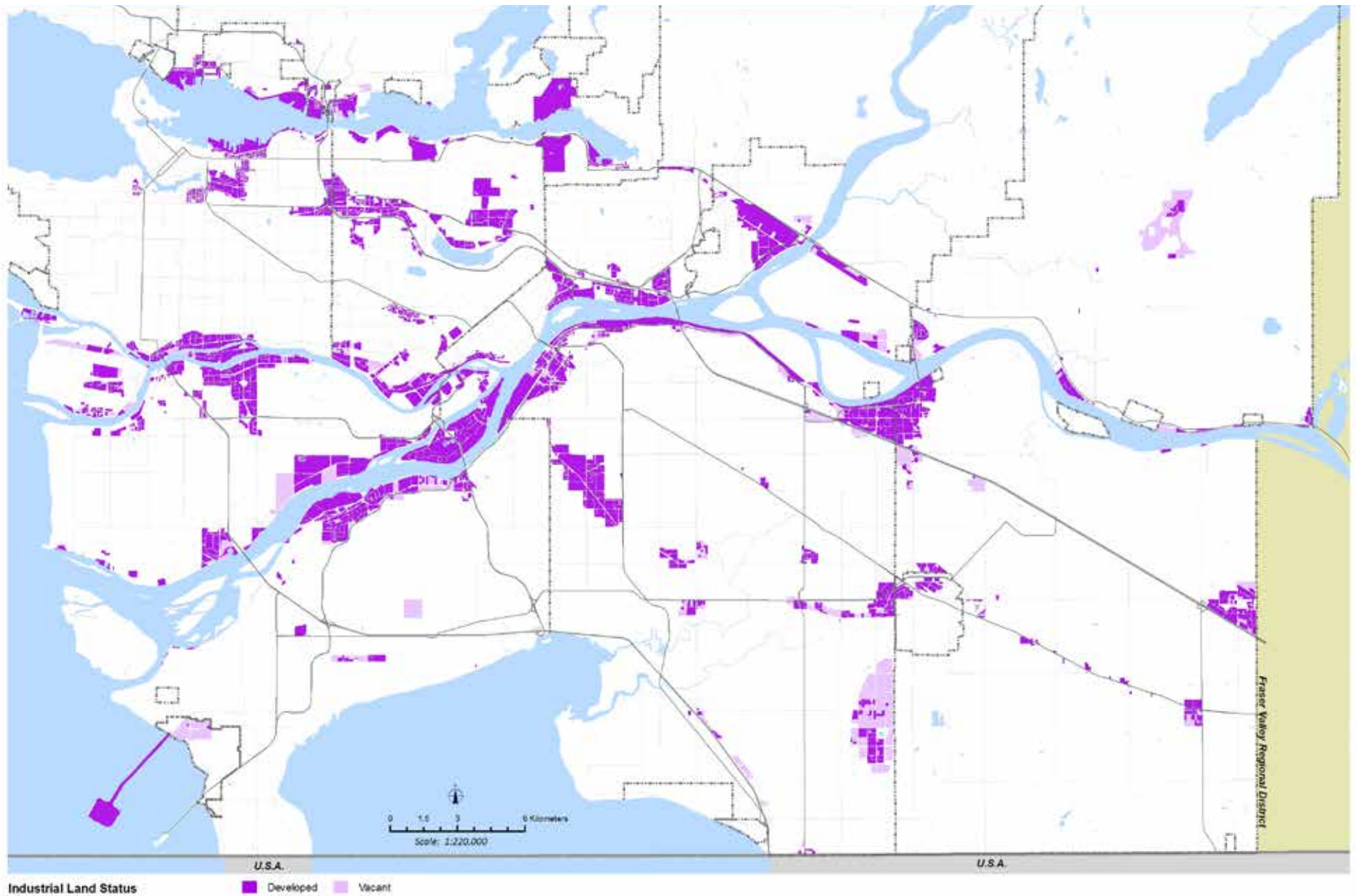
- **'Developed'** lands are those with industrial and quasi-industrial uses. They also include lands with some non-industrial uses that are building

intensive and not likely to redevelop to industrial uses. These uses include stand-alone retail and office, as well as media production, banquet hall / assembly, education / training, and indoor recreation. These commercial uses are included in the 2015 Inventory because they are located on lands that are municipally designated industrial.

- **'Vacant'** includes lands that are totally vacant, as well as lands that have non-industrial uses that are likely to (re)develop to industrial uses. Specifically, this includes lands that are municipally designated industrial, but currently are used for agriculture, residential, or resource extraction.



## DEVELOPED AND VACANT INDUSTRIAL LANDS

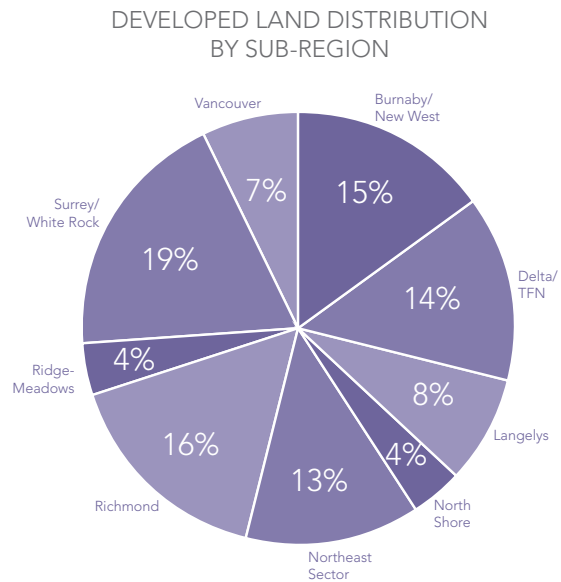


## Developed Industrial Lands

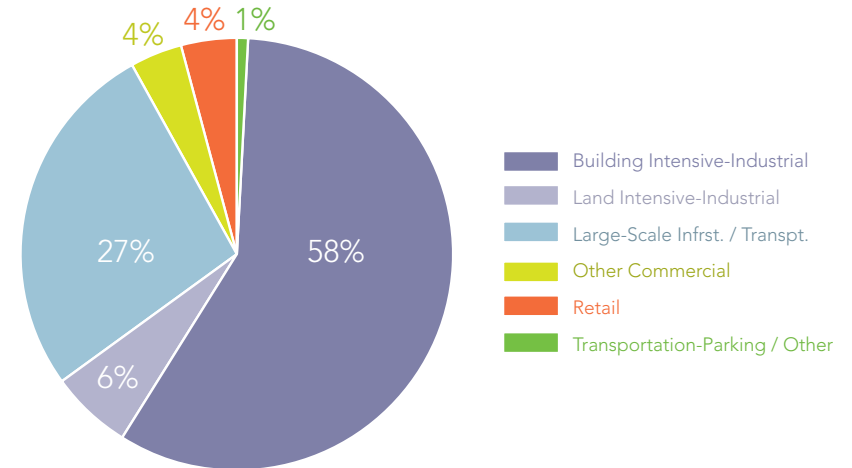
'Developed' lands comprise 80% of the 2015 Inventory (9,071 ha / 22,414 ac).

The following charts illustrate the distribution by geographic sub-region, with Surrey, Richmond, Burnaby / New Westminster, and Delta / Tsawwassen First Nation having the greatest amount of developed industrial lands.

58% of developed lands are considered 'General Industrial' and 27% are 'Large-Scale Infrastructure / Transportation'. The other land use classifications make up a relatively small proportion of the 2015 Inventory.



DEVELOPED LAND DISTRIBUTION BY CONSOLIDATED LAND USE CLASSIFICATION



## Vacant Industrial Lands

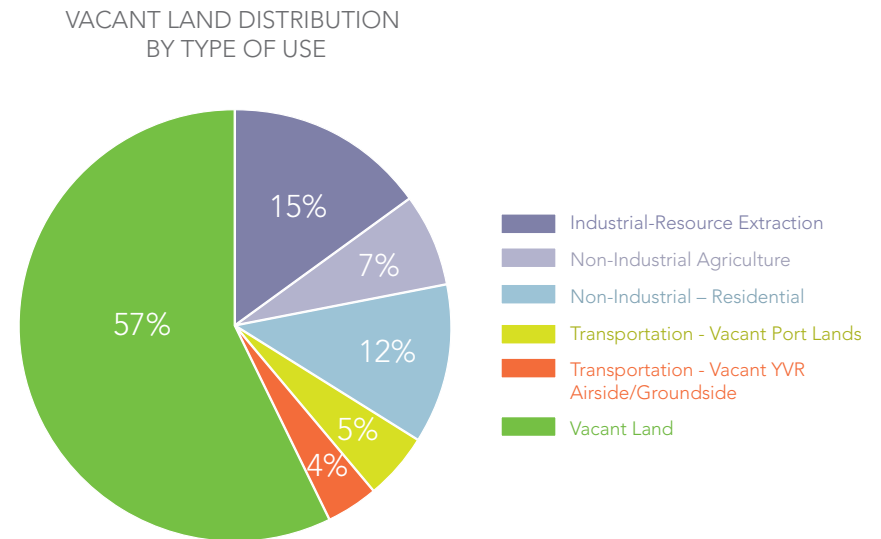
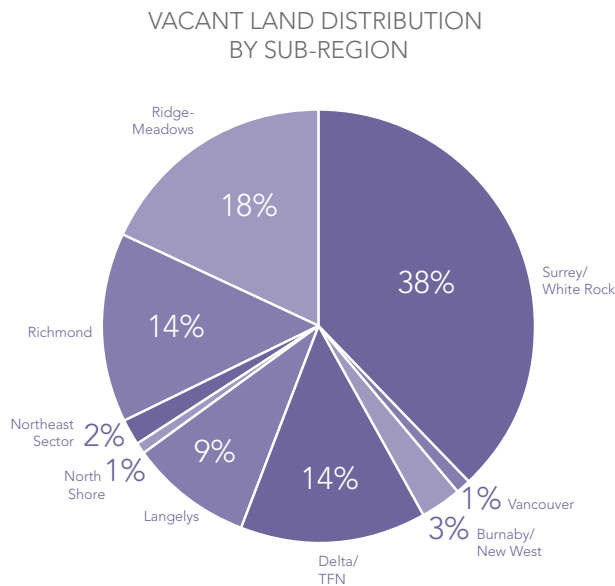
20% of 2015 Inventory lands (2,261 ha / 5,586 ac) are 'Vacant', which includes lands that are totally vacant, as well as those that have non-industrial uses with the potential to redevelop to industrial uses (e.g. 'Residential' or 'Agriculture').

Of the six types of 'Vacant' lands, over half (57%) are completely vacant, while 'Resource Extraction' comprises 15%, 'Residential' 12%, and 'Agriculture' 7%. All of these lands offer future opportunities for industrial development.

By sub-region, 38% of vacant lands are located in Surrey, 18% in Ridge – Meadows, 14% in Richmond, and 14% in Delta / Tsawwassen First Nation.

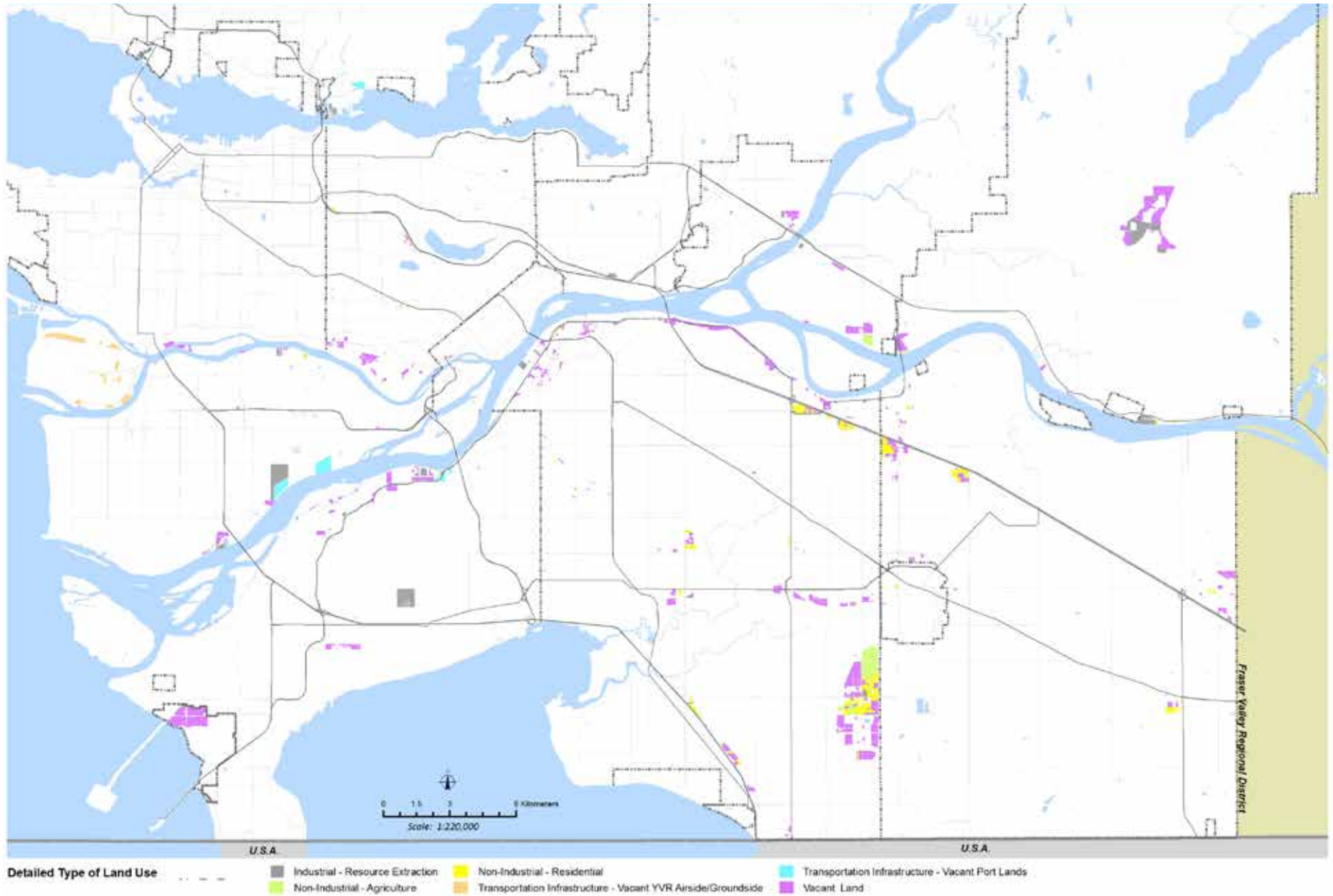
Specific notable major 'Vacant' lands as of mid-2015 include:

- The Tsawwassen First Nation lands that abut the Roberts Bank Terminal and that are accessible by the new South Fraser Perimeter Road (SFPR);
- Campbell Heights in southeast Surrey, which is developing;
- Northeast Maple Ridge, which is located far from transportation infrastructure; and,
- Some smaller sites in Richmond, Delta, Surrey, Langley, and Pitt Meadows.



The map on the following page shows the 'Vacant' lands, by the six types of vacancy. The lands are distributed throughout the region, with large resource extraction sites in Richmond, Delta, and Maple Ridge, and numerous residential properties in Surrey and Langley.

## VACANT LANDS BY TYPE OF USE



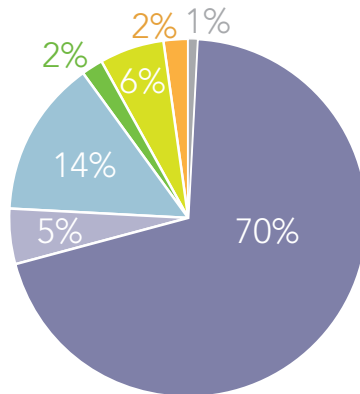
## 6 INDUSTRIAL LANDS BY OWNERSHIP TYPE

70% of the lands in the 2015 Inventory are privately owned, with an additional 5% owned by railways. The balance of lands (25%) are owned by various levels of government.

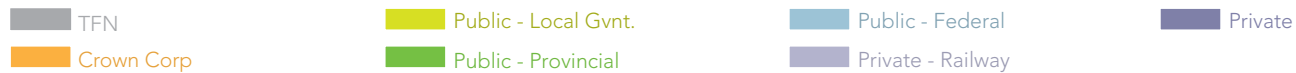
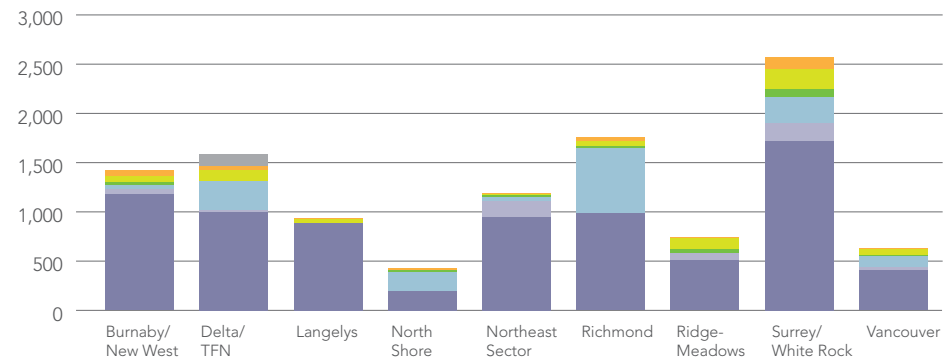
By land ownership type, some observations are:

- nearly all Tsawwassen First Nation industrial lands were classified as vacant as of mid-2015 (although many of these lands are in the development process);
- nearly all (96%) rail lands were developed; and
- most (84%) privately-owned lands were developed.

INDUSTRIAL LANDS BY OWNERSHIP TYPE



LAND OWNERSHIP TYPE BY SUB-REGION (HA)



# 7 PROTECTION AND FUTURE INTENT FOR INDUSTRIAL LAND

The region's industrial land base has varying levels of protection, determined in large part by municipal and regional designations. Industrial lands have a variety of designations, sometimes to reflect historical use and sometimes to reflect future policy and land use intent.

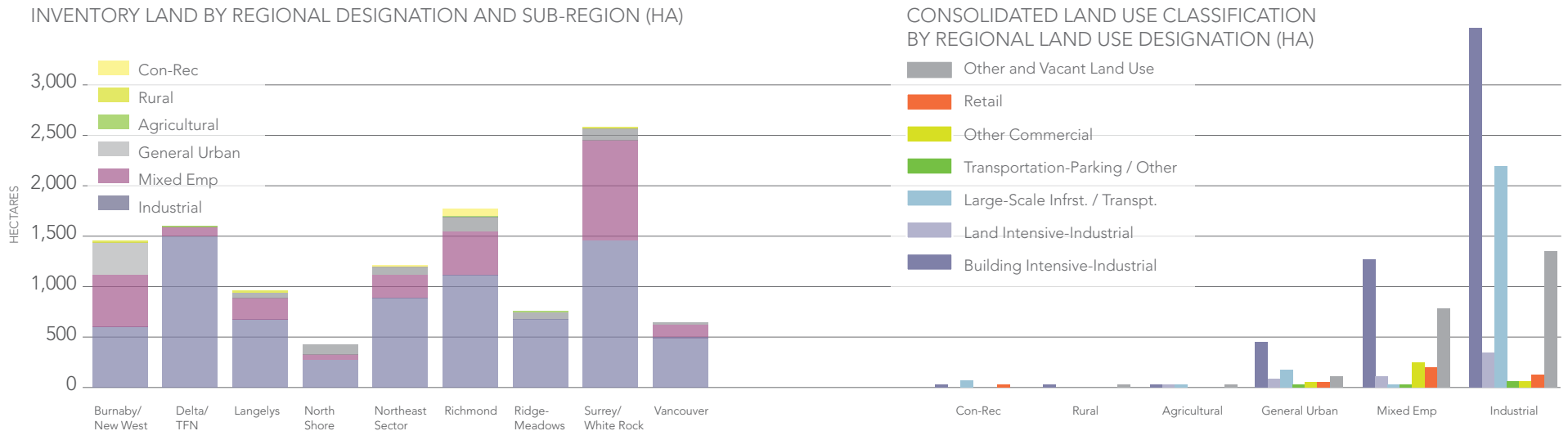
*Metro 2040* has parcel-based land use designations for the region. Over 90% of lands in the 2015 Inventory are regionally designated 'Industrial' (68%) or 'Mixed Employment' (23%). As the Industrial Lands Inventory predates the regional growth strategy, the land included in the 2005, 2010 and 2015 Inventories is based on municipal designation and zoning. This definition or universe of industrial lands has remained consistent for all three inventories to allow for comparison over time.

*Metro 2040* 'Industrial' lands are intended for heavy and light industrial activities and appropriate accessory uses, while 'Mixed Employment' lands have more flexibility in terms of use and are intended for industrial,

commercial, and other employment related uses to help meet the needs of the growing regional economy. Given this difference, existing industrial uses on 'Mixed Employment' lands may face pressures toward commercial-oriented redevelopment. Similarly, existing industrial uses on 'General Urban' lands, which comprise about 8% of the 2015 Inventory (893 ha), and which are intended for all land use types, may convert to other uses over the long-term.

The charts below illustrate how much of the 2015 Inventory is in each regional land use designation by subregion, and the breakdown of uses by designation.

Lands that have both regional and municipal Industrial land use designations, as well as Industrial zoning, effectively have the greatest protection from conversion to other uses in the long-term. 79% (8,904 ha) of the 2015 Inventory is both municipally designated and zoned Industrial. These municipal policies, along with the regional land use designation, express the intent to protect these lands for long-term industrial use.



The charts to the right illustrate how the 2015 Inventory is designated or zoned municipally by subregion, and the breakdown of designation / zoning by use.

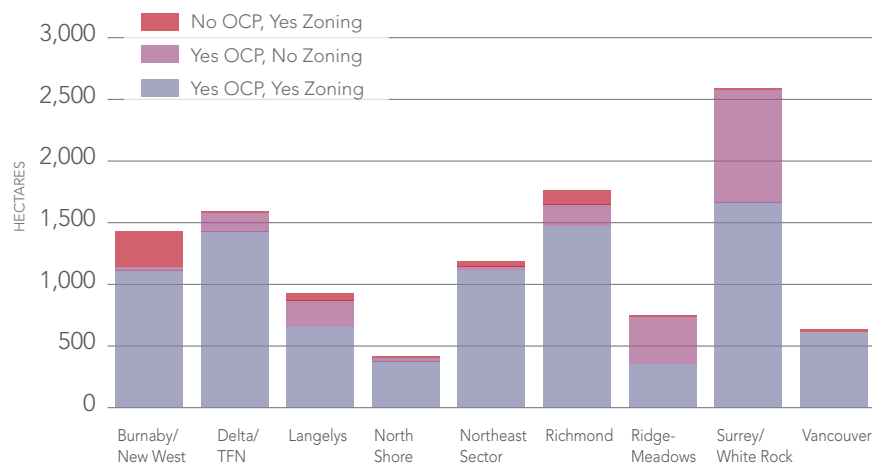
Approximately 5% (511 ha) of the 2015 Inventory has Industrial zoning, but no corresponding Official Community Plan Industrial designation (see map on the following page). These lands are mostly located in *Metro 2040* 'General Urban' areas. About 56% of these lands are located in Burnaby / New Westminster, and another 14% are located in Richmond. Lands that are used for industry and zoned Industrial, but not designated Industrial, either municipally or regionally, are significantly more likely, and often intended, to redevelop to a non-industrial use in the future.

Recognizing *Metro 2040's* multiple goals and objectives, competing policy priorities emerge. For example, while the protection of industrial lands is a regional priority, so is the intensification of lands in Urban Centres and near rapid transit. In cases where industrial lands are located near Urban Centres or rapid transit, achieving both objectives may not be possible. Just over a quarter of the 2015 Inventory lands that are regionally designated 'General Urban' are located in Urban Centres (266 ha), and ostensibly the long-term intention for those lands is to support other *Metro 2040* objectives to focus growth in transit-oriented locations and develop a network of vibrant Urban Centres.

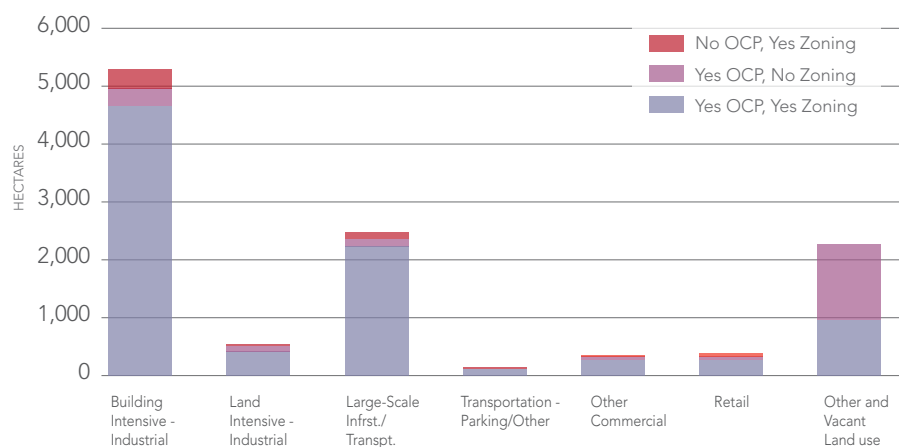
Although the policy tools, in the form of land use designations and zoning, most often reflect the intent of the local government, the loss of these industrial lands, if converted to other uses, does mean a reduction in the supply of industrial lands and displacement of the industrial tenants / users.

The map on page 24 shows the 2015 Inventory by regional and municipal land use designations.

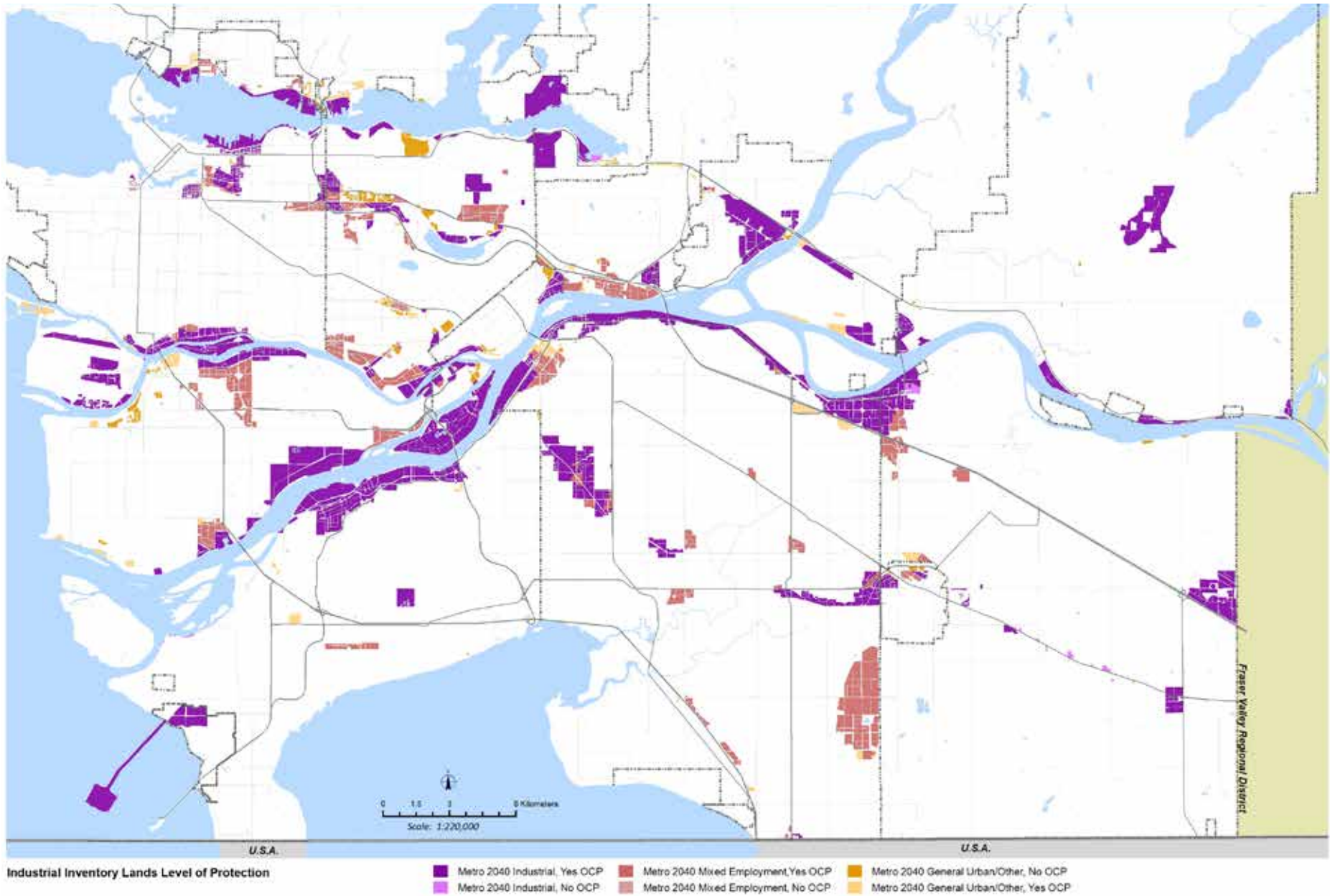
MUNICIPAL DESIGNATION / ZONING BY SUB-REGION (HA)



MUNICIPAL DESIGNATION / ZONING BY CONSOLIDATED LAND USE CLASSIFICATION (HA)



# INDUSTRIAL LANDS LEVEL OF PROTECTION





## 8 CHANGES TO THE INVENTORY OVER TIME

The 2015 Inventory was prepared to allow for comparison with past inventories (2005 and 2010, as revised). There are two sets of 'moving parts' associated with comparing the total supply of industrial land over multiple inventories:

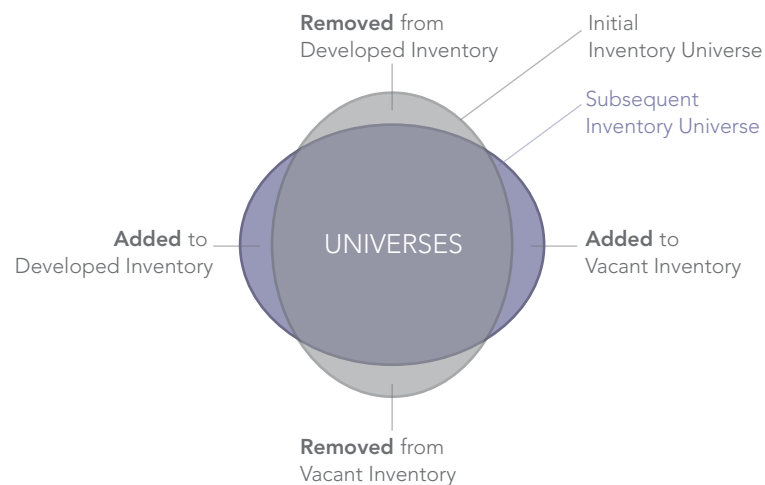
- Land changes in the Industrial Lands Inventory ('Developed' and 'Vacant' sub-totals) between the periods; and
- Lands that 'Developed' (i.e. absorbed) or became 'Vacant' between the periods.

In terms of **net** changes, there are both significant **gross** additions to the Inventory and significant **gross** deletions, as well as many other smaller changes. Most of the 'universe' or scope of lands remained constant between inventories, however there were some changes. Some lands were added to, and some lands were removed from, the preceding inventory. These land additions and deletions included both 'Developed' and 'Vacant' lands.



Between inventory periods, most lands move forward with their earlier classification as either 'Developed' or 'Vacant', while some properties became 'Developed' and others became 'Vacant'.

### CHANGES IN THE INVENTORY UNIVERSE

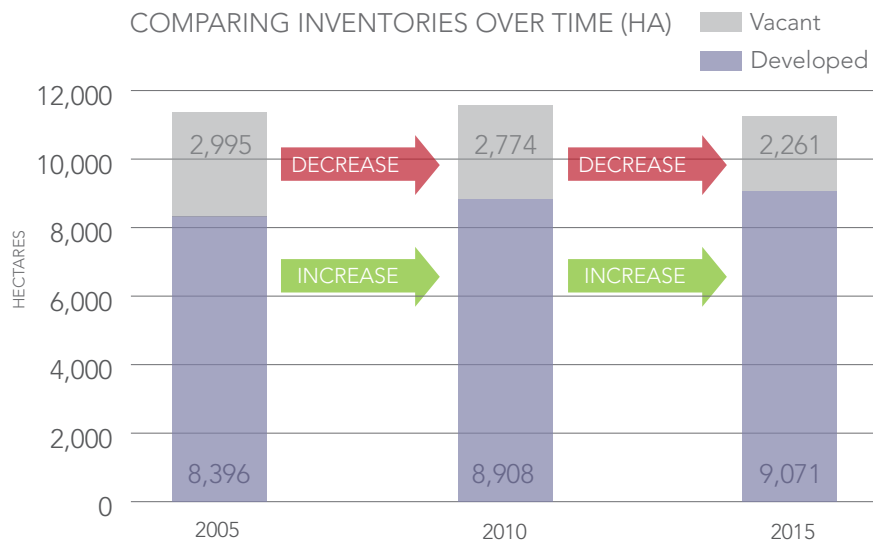


The conceptual diagram to the left illustrates how the shape of the inventory can change over time, with both 'Developed' and 'Vacant' lands being added to or removed from the 'universe'.

## Additions to and Removals from the Inventory

Notable areas of change in terms of additions and removals between the Inventories are identified. It is important to note that this differs from 'absorption', which tracks actual (net and gross) lands that convert between 'Vacant' and 'Developed' over the period.

Over the 2010-2015 period, the total amount of 'Developed' lands increased by 2% (163 ha / 403 ac), and the amount of 'Vacant' lands decreased by 19% (513 ha / 1,268 ac); the net effect was a 3% (350 ha / 865 ac) decline in the total Inventory. The following figure shows the change over the three inventory periods.



The supply of 'Vacant' lands declined by 513 ha (1,268 ac) during the 2010-2015 period: 380 ha (74%) became 'Developed' via absorption while 134 ha (26%) were removed from the Industrial Lands Inventory.

While lands were removed for a number of reasons, municipal policy changes (such as OCP designation changes or lands being rezoned and developed for non-industrial uses) were the main reason for change.

Of the 147 ha of new lands added, 14 ha (9%) were 'Developed' by mid-2015, while 133 ha (91%) were added to the 'Vacant' category (noting the different types of 'Vacant'), with nearly half (49%) being totally vacant, and nearly a third (30%) being 'Agriculture'.



## Past Land Absorption

For the purpose of the 2015 Inventory, land absorption is defined as the rate at which land is converted from 'Vacant' status to 'Developed' status (as defined). Net absorption reflects two components:

- Gross lands that went from 'Vacant' to 'Developed' status, and thus added to the Industrial Lands Inventory of 'Developed' lands; minus
- Gross lands that went from 'Developed' to 'Vacant' status over the same period.

Together, these two **gross** components provide for a **net** absorption:

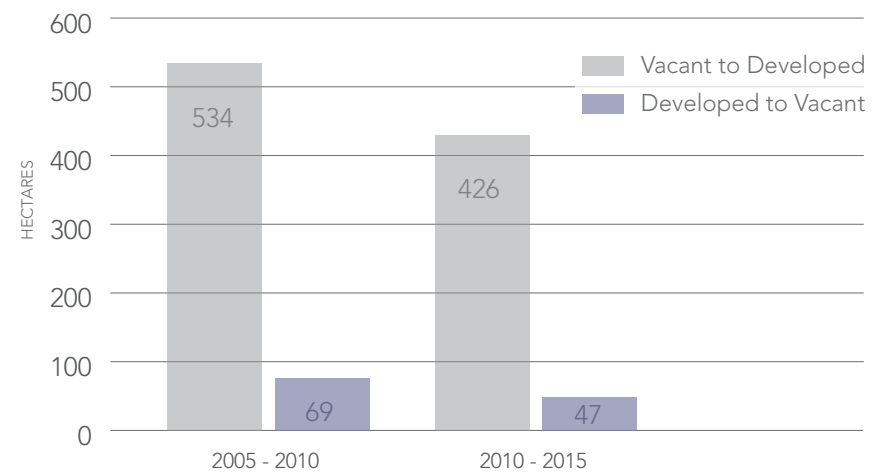
- Over the 2010-2015 period, 426 ha (1,054 ac) of lands went from 'Vacant' to 'Developed' status, while 47 ha (116 ac) of lands went from 'Developed' to 'Vacant'. This yielded a net absorption of 380 ha (939 ac) of industrial lands over the five-year period, or 76 ha (188 ac) per year on average.
- This compares to 93 ha (230 ac) per year on average for the 2005-2010 period.

Notably, the annual land absorption rate declined between the 2005-2010 and 2010-2015 periods, which is generally consistent with industrial building growth over the periods.

Most of the lands (69%) that were 'Developed' over the 2010-2015 period were added to the 'General Industrial' classification, followed by 12% in 'Industrial – Outdoor Storage'.



ABSORPTION OF INDUSTRIAL LANDS (HA)



## Possible Future Land Absorption

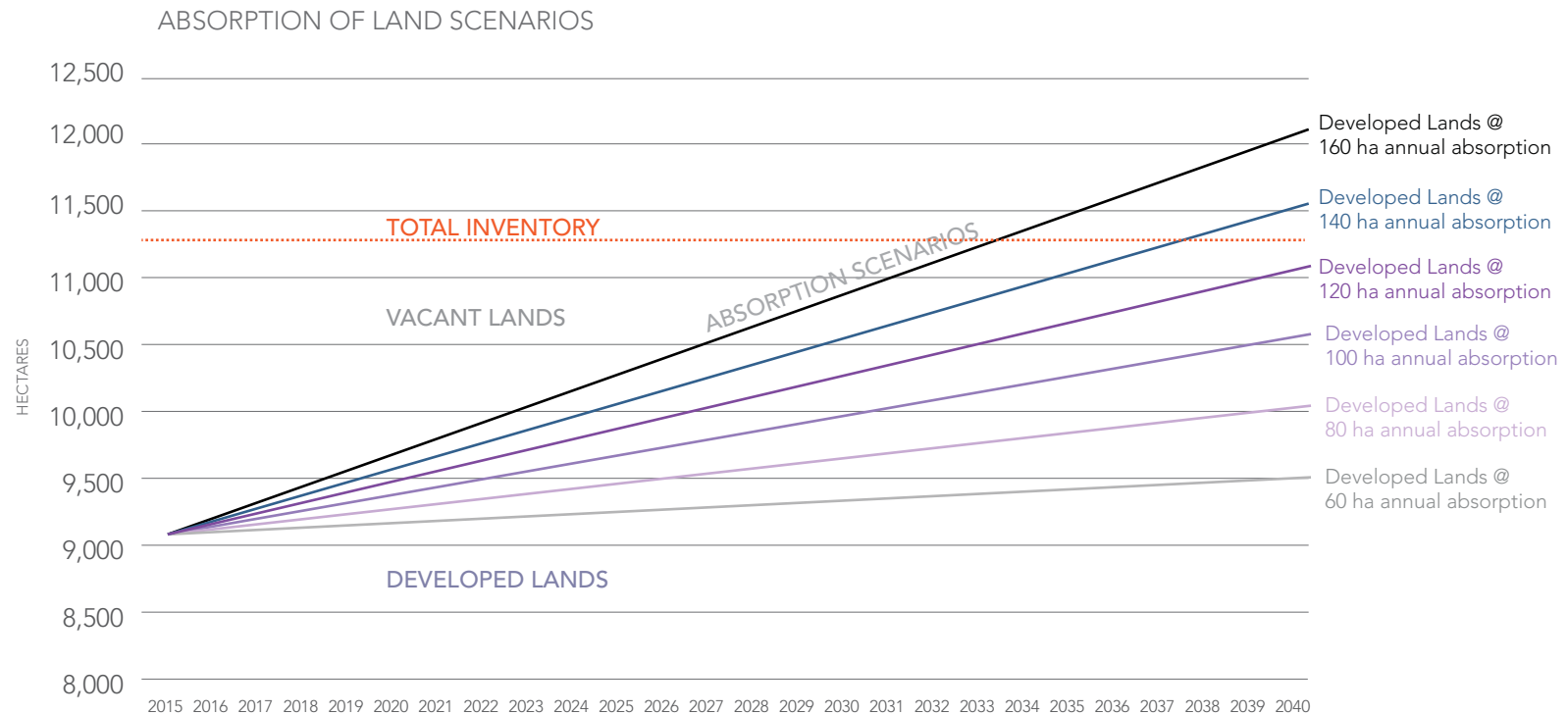
Below are the results of applying different hypothetical industrial land absorption rates using 2015 Industrial 'Vacant' lands. For example, under the absorption rate of 100 ha (250 ac) per year, the 2015 Inventory of 'Vacant' land supply might be substantially absorbed by the 2030s. If future port trade activity and the volume of container traffic grows at a faster pace (i.e. construction of Roberts Bank Terminal 2), the region could see stronger demand and further scarcity of industrial lands would occur sooner. However, if intensity and redevelopment increases, land would be absorbed at a slower rate.

A complex set of factors affects industrial land supply, demand, utilization, and absorption rates. Further, a buffer of free space is required to accommodate redevelopment and vacancy and other forms of transition.

As land demand and development reaches saturation or full capacity, the remaining supply will include smaller, scattered remnant parcels that may not be viable for larger industrial developments due to limited size, site constraints, and / or poor location and access.

The development potential of a portion of the 'Vacant' lands will be hindered by factors such as location, current uses, accessibility, lot assembly, market considerations, soil conditions, need for pre-loading, or high development costs. Based on these various constraints, the possible supply of net developable lands will be lower than the theoretical gross supply.

At the same time however, land absorption rates will also be affected by the redevelopment of under-utilized properties and intensification of developed industrial areas, which could extend the lifespan of the land supply.



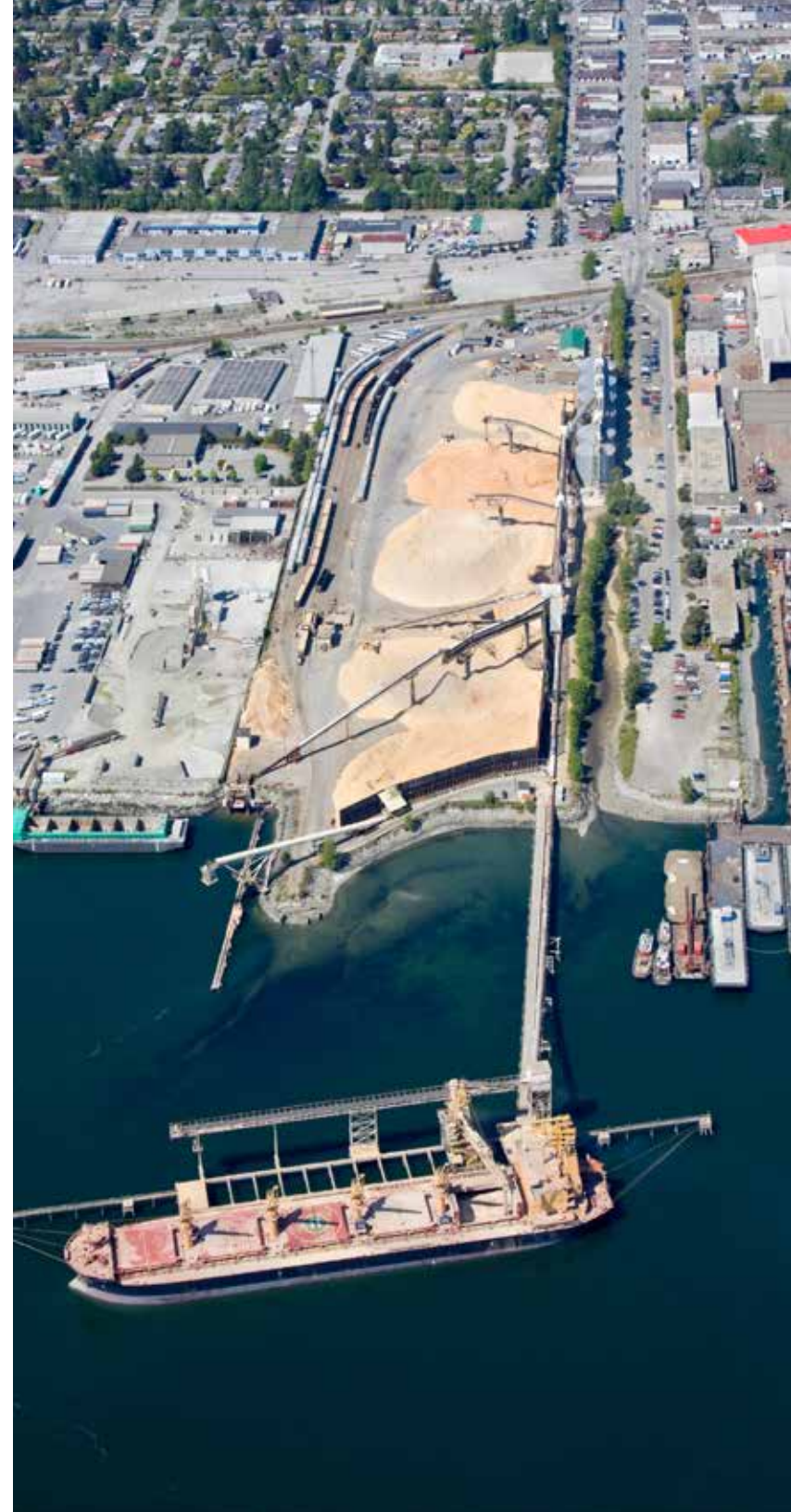
## 9 FURTHER WORK

The 2015 Inventory can be considered and analyzed through different 'lenses' or 'filters'. Further study is planned, including consideration of market readiness timing and redevelopment / intensification potential.

Future areas of work under consideration include:

- Industrial land demand scenarios to better understand future possible absorption rates by types of industrial users and lands;
- Goods movement transportation infrastructure needed to support efficient use of industrial lands in the region; and
- Industrial lands governance, planning, and regulation best practices from other jurisdictions that may be applicable in Metro Vancouver.

The 2015 Inventory will also be periodically updated. The Industrial Lands Inventory and research work will support a better understanding of the industrial lands issues in the region and will inform regional and local policies intended to protect and intensify the use of industrial lands in the Metro Vancouver region over the long-term.



## 10 APPENDIX 1: METHODOLOGY

The objective for the methodology is to create a clear set of rules that can be consistently applied using available information to systematically categorize industrial lands in the Metro Vancouver region. To build the Industrial Lands Inventory, available data from multiple sources was linked together with an internal GIS system.

Parts of the 2015 Inventory classification system are designed to be comparable with past inventories (2005 and 2010, which were revised), so that change over time can be measured.

### Classification Notes

- All references to land areas are gross calculations – net developable areas are less;
- Classifications reflect actual use of the lands, as of mid-2015, not necessarily the zoning, designation, nor future use of the lands;
- Classification definitions reference the primary use of the site, including normally associated on-site accessory / ancillary uses, such as parking and loading areas;
- Properties may include multiple or overlapping and non-discrete uses, in which case the predominant use is considered for the classification;
- Although some lands do not have large buildings, they are still substantially utilized with accessory outdoor activities;
- A 'site' may represent multiple separate legal properties consolidated for the purposes of the inventory analysis;

- Only in unique or exceptional circumstances are properties 'split' into two sites for inventory purposes;
- Unassociated abutting properties could be consolidated to create larger developable sites to potentially accommodate larger industrial users;
- Current land use classification is independent of future-oriented land use designations; and
- Not all lands in the Inventory are useable for all types of industry.

### Report Limitations

During the course of preparing the 2015 Inventory, a number of limitations including interpretation issues or application challenges were identified and addressed as best as possible. These included: imperfect data; varying interpretations coupled with a desire to maintain consistency; multiple uses on a single site; 'shades of gray' between different types or levels of uses; type(s) or level of use not always clear; and municipal plans that include 'mixed employment' designations / zoning that allow for a range of uses. Data sources are from different periods, and accuracy cannot be confirmed in all cases.

The 2015 Inventory for sites or areas with a wider variety of uses, such as parts of the City of Vancouver, may be less reliable than other areas of the region due to a high degree of mixed-use and multi-tenanted buildings.

This report should not be relied upon to make site specific planning or development decisions or investments.

# 11 APPENDIX 2: LAND USE CLASSIFICATION DEFINITIONS

The following land use classification definitions reference the predominant or primary use of the site, including normally associated on-site accessory / ancillary uses (including parking and loading areas), as of mid-2015. Sites may include multiple or overlapping and non-discrete uses, in which case the predominant use is considered for the classification. A 'site' may represent multiple separate legal properties consolidated for the purposes of the inventory analysis. Current land use classification is independent of future-oriented land use designations.

## **Building-Intensive Industrial**

1. **General Industrial:** Wide variety of heavy and light industrial uses, including logistics, warehousing, manufacturing, production, distribution, and repair functions of various scales, and limited industrial-related accessory uses, such as on-site retail, office, and associated improvements to land (i.e. finished surface) and / or related outdoor storage. This also includes: processing, handling, or stockpiling of natural resources, such as lumber, saw mills, shingle mills, aggregates, and asphalt / concrete mixing (excluding such activities occurring on 'Transportation Infrastructure' lands).

## **Land-Intensive Industrial**

2. **Industrial - Outdoor Storage:** Ongoing and temporary land-intensive outdoor storage of miscellaneous / scrap materials, solid waste/recyclable goods, auto-wreckers / vehicle parts, truck / chassis parking, shipping containers, construction materials, and heavy equipment / machinery (excludes 'Industrial - Resource Extraction' and Port Terminal related storage / stockpiling).
3. **Other Infrastructure - Maintenance Yards / Emergency Services:** Municipal, corporate, and agency works yards involving the storage and maintenance of road, construction, and maintenance equipment and supplies, and ambulance / fire truck stations.

## **Large-Scale Infrastructure / Transportation**

4. **Other Infrastructure - Utilities:** Electricity, natural gas, telephone, cable, communication towers, power sub-stations, liquid and solid waste management facilities, and other related / supporting functions, etc.
5. **Other Infrastructure - Oil Tank Farm:** Facilities for petroleum products transportation, storage, or processing, including refineries, as well as associated hazard separation setback areas.
6. **Transportation Infrastructure - Rail Yards:** Rail intermodal yards (excluding individual rail lines/corridors, which are not included; rail spurs located on properties are classified as per the primary use of that property).
7. **Transportation Infrastructure - YVR Airside / Groundside Developed\*:** Airside lands refer to restricted industrial lands that are developed and reserved exclusively for airport-related industrial activities (e.g. airplane maintenance) requiring immediate access to runways and taxiways and are not available for general market industrial use. Groundside lands refer to restrictive industrial lands that are developed and not available for general market industrial, but permit uses that are 'airport compatible' (e.g. couriers) and are further limited by restrictions on building height and design because of adjacent flight paths. Airfields are not included in the Inventory.
8. **Transportation Infrastructure - Port Terminal Developed\*:** Developed lands directly associated with port terminals/dock/wharf and equipment used for loading and unloading (and associated storage / stockpiling) of various types of goods (e.g. autos, bulk, breakbulk, and containers).

## **Transportation Infrastructure – Parking / Other**

9. **Transportation Infrastructure - Other:** Parking/storage/maintenance of transit operations (including TransLink depots) and large taxi operations located on Inventory lands.

10. **Transportation Infrastructure - Parking:** Properties that are used exclusively for parking of vehicles without another primary use, in the form of either surface parking lots or structured parking facilities, where ownership is not associated with adjacent properties / businesses (excludes lands used for the temporary storage of newly imported vehicles which is classified as 'Industrial - Outdoor Storage').

#### **Retail Uses**

11. **Non-Industrial - Retail (big box):** Major stand-alone retail or wholesale units (chain stores or stores over 50,000 sq ft building sizes) and associated parking.

12. **Non-Industrial - Retail (small or medium-scale):** Individual or multiple retail uses (under 50,000 sq ft building sizes) and associated parking.

13. **Non-Industrial - Retail (car / trailer dealerships):** New and used vehicle sales lots and business operations for showing, storing, and selling of vehicles (e.g. auto, trailer, boats) (excludes the temporary storage of newly imported vehicles which is classified as 'Transportation Infrastructure – Port Terminal', and vehicle maintenance facilities which are classified as 'General Industrial')

#### **Other Commercial Uses**

14. **Non-Industrial - Office:** Stand-alone office building and associated parking, which may include retail uses on the ground level.

15. **Non-Industrial - Media Production:** Facilities used for production or broadcast of film / movies / videos, such as filming / recording studios, sound-stages, equipment storage / rental, however excludes software production offices.

16. **Non-Industrial - Banquet Hall / Assembly:** Assembly facilities and associated parking, used for religious or non-religious large-scale assembly / gathering uses and events.

17. **Non-Industrial - Education / Training:** Training, vocational school or other educational related functions, which may or may not include a classroom component.

18. **Non-Industrial - Indoor Recreation:** Indoor recreational uses, such as fitness facilities, racket clubs, and other recreational activities.

#### **Other Uses / Vacant**

19. **Non-Industrial - Agriculture:** Agricultural or farming related uses (independent of Agricultural Land Reserve designation or BCAA Farm Class status), as a possible holding use for future conversion.

20. **Non-Industrial - Residential:** Residential use, typically an older single detached house and yard, as a possible holding use for future conversion.

21. **Industrial - Resource Extraction:** Earth extraction uses, such as aggregates / gravel / sand pits, and peat.

22. **Transportation Infrastructure - YVR Airside/Groundside Vacant\*:** Airside lands refer to restricted industrial lands intended for development and are reserved exclusively for airport-related industrial activities (e.g. airplane maintenance) requiring immediate access to runways and taxiways and are not available for general market industrial use. Groundside lands refer to restrictive industrial lands intended for development and are not available for general market industrial, but permit uses that are 'airport compatible' (e.g. couriers) and are further limited by restrictions on building height and design because of flight paths. Runways and airfields are not included in the Inventory.

23. **Transportation Infrastructure - Port Terminal Vacant\*:** Vacant lands directly associated with port terminals / dock / wharf and equipment intended for use for loading and unloading (and associated storage / stockpiling) of various types of goods (e.g. autos, bulk, breakbulk, and containers).

24. **Vacant Land:** Lands that do not have any identified improvements or uses of any sort or type (either industrial or non-industrial).

\* Note: These lands may have restrictions on sale and development and not available for general market industrial, but permit uses that are port or airport compatible. For more detailed information, please refer to the YVR Master Plan or Port Metro Vancouver Land Use Plan, as applicable.







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