

EMPLOYMENT AREA LAND BUDGET UPDATE



HEMSON
Consulting Ltd.

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I INTRODUCTION

Hemson Consulting Ltd. has been retained by the City of Hamilton to prepare an updated Employment Area land budget. The update is being undertaken as input to the City's long-range economic and land use planning efforts and conformity with the 2006 Provincial *Growth Plan for the Greater Golden Horseshoe* (the *Growth Plan*).

A. PURPOSE OF STUDY

In 2006, Hemson Consulting Ltd. was retained by the City of Hamilton to undertake the Comprehensive Employment Study (the CES). The purpose of the CES was to examine the supply and demand for employment land in the City of Hamilton to 2031 and reach conclusions on the amount of new land required and its preferred location. The key conclusions were that:

- The City of Hamilton's supply of employment land was not sufficient to accommodate growth and that approximately 1,000 gross ha of additional land were required beyond existing designations; and
- The preferred location to meet most of this requirement was in a new area focussed on the Highway 6 and Highway 403 interchange and adjacent to the Hamilton International Airport (HIA).

- A small extension of the North Glanbrook Business Park was also recommended as a more immediate prospect for bringing new employment land to market and to take advantage of the completion of the Red Hill Creek expressway.¹

The CES was based on an analysis of 2001 Census employment information and an inventory of employment land prepared by Hamilton staff in 2004. Since the CES, however, more recent 2006 Census employment figures have become available and City of Hamilton staff have prepared an updated land inventory to year-end 2008.

The purpose of this study is to update the conclusions of the CES with this more recent information. Updated conclusions are provided on the amount of new land required, but not the preferred location. Council has already decided that a new Employment Area adjacent to the HIA is the preferred location for new lands, and staff are proceeding with the development of a secondary plan for this area.²

¹For details, see City of Hamilton Comprehensive Employment Study: Meeting Long-Range Employment Land Requirements in the City of Hamilton, prepared by Hemson Consulting Ltd. for the City of Hamilton in November 2006.

² For details, see Airport Employment Growth District, Secondary Plan Phase 1 – Land Use Draft Report, prepared by Dillon Consulting Ltd. for the City of Hamilton in May 2008.

B. DEFINITIONS

In planning practice in recent years, a number of similar sounding but distinct concepts have emerged related to planning for employment, including: “Employment Area”, “employment use”, “employment land employment” and “employment land”. To avoid confusion, Hemson’s approach to this study is based on the following:

- “Employment Area” is defined by the PPS and the *Growth Plan* 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;¹
- “Employment use” is considered to be the broad range of employment uses that could occur within an Employment Area, as defined in the PPS and the *Growth Plan*; and
- “Employment Land Employment” is employment contained primarily within large, land-extensive, low-rise, industrial-type buildings including industrial multiples, typically in a Business Park setting. Some of this employment can also be in rural areas serving agricultural or other local economic functions.

¹ Defined on page 42 of the *Growth Plan for the Greater Golden Horseshoe* (2006)

“Employment Land Employment” therefore relates to certain types of jobs occurring in certain types of building space. “Employment Land” is the land base occupied by this type of employment. The distinction between “Employment Lands” on the one hand and “Employment Areas” on the other is important to an understanding of the estimate of land need presented in this report:

- The City of Hamilton’s new urban official plan uses the term “Employment Area” to indicate the geographic areas in the City that are planned to be predominantly occupied by, but not necessarily exclusively used for, employment land employment.
- Under the urban official plan, the City’s Employment Area lands exclude major retail uses, but are expected to accommodate ancillary and accessory retail and service uses and offices. The inclusion of such uses is generally to recognize that both core employment land uses as well as office and ancillary retail and services are an integral part of the City’s Employment Areas from an urban structure perspective.
- This is also the definition used in the 2008 land inventory, although the inventory includes some parcels that are identified for conversion to non-employment uses in the new urban official plan. In this report, the estimates of land need are for the Employment Areas, as defined and understood by the City of Hamilton for the purposes of the 2008 land inventory and as intended to be applied in the new urban official plan.

C. STRUCTURE OF REPORT

This report is organized into three main sections:

- The following chapter describes the updated growth outlook, including the forecast for employment land employment over the planning period to 2031;
- The next chapter describes the supply of Employment Area lands, as defined by the City of Hamilton, and its sufficiency to accommodate future demand, including the supply of land in the greenfield Business Parks and Industrial Areas; and
- The final chapter provides our overall conclusions, including next steps.

It is important to note that the need for Employment Area lands is only one element of the City's urban structure and long-range land use planning efforts. The estimate of Employment Area land needs that is presented in this report will need to be considered in the context of the City's overall plan for new greenfield lands and the quantitative targets set out in the *Growth Plan*, in particular the quantitative target for greenfield density.

Under the *Growth Plan*, municipalities must plan to achieve a minimum density of 50 residents and jobs combined per ha in new greenfield areas. Municipalities are also directed to achieve other targets regarding the share of new residential units to be provided through intensification and development in the Urban Growth Centres. For the purposes of planning Employment Areas, however, the *Growth Plan* greenfield density target is particularly relevant.

An updated Employment Area land budget is therefore required as input to the City's overall economic and land use planning efforts., including plans for greenfield residential communities. The updated land budget is also being undertaken to address some of the comments provided by the Province on the method used to estimate land needs, including the forecast of employment by type, and assumptions relating to: long-term vacancy in the land supply; employment densities; and declines in the City's existing Employment Area land base.

II EMPLOYMENT LAND EMPLOYMENT WILL PLAY AN IMPORTANT ROLE IN HAMILTON'S ECONOMIC FUTURE

This chapter describes the updated employment forecast for the City of Hamilton that is used as the basis for estimating long-range Employment Area land requirements.

Under the *Growth Plan*, the City of Hamilton is directed to plan for a total employment of 300,000 jobs in 2031. Consistent with the conclusions of the CES, a significant portion of this employment is anticipated to be employment land employment.

A. DEMAND FOR EMPLOYMENT LAND IN THE GTA/H WILL REMAIN STRONG

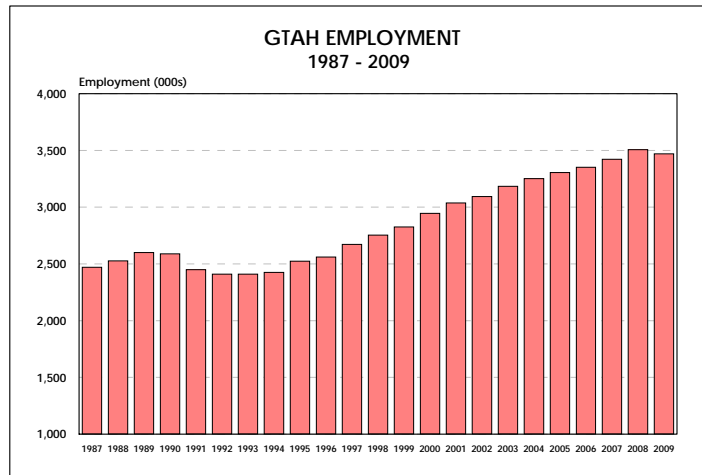
As discussed in many of our previous reports, demand for employment land in the GTA/H is anticipated to remain strong. Neither the evolution of manufacturing nor changes in the structure of employment appears to be significantly reducing the need for employment land. Communities in the GTA/H still need to provide traditional Employment Areas to accommodate employment land employment, including the City of Hamilton.

1. Long-Term Economic Outlook Remains Positive

It is important to note that, as this study is being undertaken, the national and global economies are in a period of great uncertainty. Reflecting current conditions, a period of slower growth can be expected over the 2006 to 2011 census period. The manufacturing sector, in particular, is likely to face significant challenges along with both residential and commercial land markets.

While the global real estate problems are mostly related to the housing market, to date, non-residential land markets have in some degree followed patterns in the housing market. It is important, however, that the local effects of these international markets not be overstated. There are fundamental differences between the Toronto area market, some other Canadian markets and virtually all major United States markets. In particular, the real estate bubble and all its attendant implications for the financial system and for individual households were relatively more restrained in the GTA/H relative to the excessive price increases and declines observed elsewhere.

Notwithstanding the current economic uncertainties, however, the pattern of sustained employment growth in the GTA/H over the long term is clear. As shown in the graph below, since the end of the recession of the early and mid-1990s, employment has grown rapidly and steadily in the GTA/H.



Source: Statistics Canada, Labour Force Historical Review June 2009;
Note: GTAH defined as Toronto, Hamilton & Oshawa CMA's

Since the focus of this report is on planning and development, it should also be recognized that the current recession will have short-term effects on the residential and non-residential and real estate and development sectors in the GTAH. Not only is a general reduction in demand likely, but the financial crisis has made buyers nervous and investors cautious, and has significantly reduced the level of risk many lenders are willing to tolerate.

Over the long term, however, and within a broader national and global context, our view is that the GTAH remains well-positioned to be a focus of growth when the economic recovery occurs. Economic output is anticipated to continue to grow over the forecast period, accompanied by growth in employment and income across the GTAH as well as in the City of Hamilton.

2. Employment Land Will Play a Major Role in Accommodating Future Growth

The employment outlook in the *Growth Plan* continues to be for strong performance in the GTAH and the broader GGH to 2031. The strong employment outlook is based on the continued attractiveness of the southern Ontario economy for new investment and a strategic location relative to markets in the United States.

Over the most recent census period from 2001 to 2006, there is no question that some changes have occurred in the structure of *employment*, particularly with respect to restructuring in the manufacturing sector. For the first time in decades, manufacturing is not the largest sector of employment. This shift is the result of many factors, including changes in the nature of work, increased productivity and other changes commonly attributed to the rise of the “new economy”, or “service economy”, or “creative economy”.

These changes do not necessarily mean, however, that demand for employment land is declining. Over the long term, manufacturing output has consistently grown at a faster rate than manufacturing employment, suggesting that the sector is becoming more efficient as a result of labour-saving technological advancements. In our view, it is not appropriate to conclude that the need for employment land is declining from the observation that manufacturing employment is declining, or growing at a less rapid rate than overall employment:

- The GTAH is still an industrial-based economy, with significant components of the economic base accommodated on employment land;
- When measured by output, it appears as if the GTAH economy has become *more* oriented towards manufacturing, contrary to the more common argument about the decline of manufacturing;
- Some analysts are even anticipating that employment in the manufacturing sector in Canada and the United States will start to grow, as a result of rising energy costs that will diminish the advantages of low-cost but distant producers such as China;¹ and
- If anything, demand for employment land in the “new economy” is likely to increase, given the convergence of the diverse range of industrial activities that make up the economy and the emergence of larger, more efficient industrial facilities.²

¹ For details, see *Why Your World is About to Get a Whole Lot Smaller: Oil and the End of Globalization*, Rubin, J., Random House Canada, 2009, page 23. A recent study by Statistics Canada has also concluded that there is little evidence of long-term decline in Canada’s manufacturing sector when measured in terms of output. For details, see *The Canadian Manufacturing Sector: Adapting to Challenges*, Statistics Canada Catalogue no. 11F0027M — No. 57, July 2009.

² For details see, *Employment Land Conversion Analysis*, prepared by Hemson Consulting Ltd. for the City of Hamilton in November 2008.

Employment land will continue to play a major role in the competitiveness of the GTAH and the broader GGH, and needs to be properly planned to accommodate the employment outlook in the *Growth Plan*. Goods production and distribution remain part of a complex arrangement of economic activity that continues to be housed primarily in single-storey, industrial-type buildings accommodated on employment land within Employment Areas.

3. It Is Difficult to Change This Pattern Through Land Use Planning Policy

Many planners and policy-makers have suggested that the current pattern of low-density employment land development should be changed by increasing density or encouraging the intensification of existing areas, including the re-purposing of standing building stock. As we have argued before, both are exceptionally difficult objectives to achieve through land use planning.

Planning policy can regulate land and buildings, but cannot control the density of employment or the structure of the economy. Similarly, when municipalities face constraints to their employment land supplies, there is often the expectation that employment intensification will enable higher densities and reduce overall employment land requirements. This is also an increasingly common argument advanced in support of applications to convert employment land to other, non-employment uses.

While a valuable and practical tool for estimating land need, there is very limited ability for planning authorities to control or direct employment density. Employment density is simply a result of how economic activities are accommodated on the ground. Historically, the experience of most communities in the GTAH has been that planning policy — if not combined with significant public sector financial incentives — has had a weak influence on employment land density or employment intensification.

The nature of the GTAH economic base is such that a significant share of employment is accommodated in large, land-extensive, single-storey, industrial-type buildings on employment land. This built form is related to the structure of the metropolitan economy and is not expected to change rapidly or significantly through the forecast period.

B. HAMILTON IS VERY WELL-POSITIONED TO COMPETE FOR NEW INVESTMENT

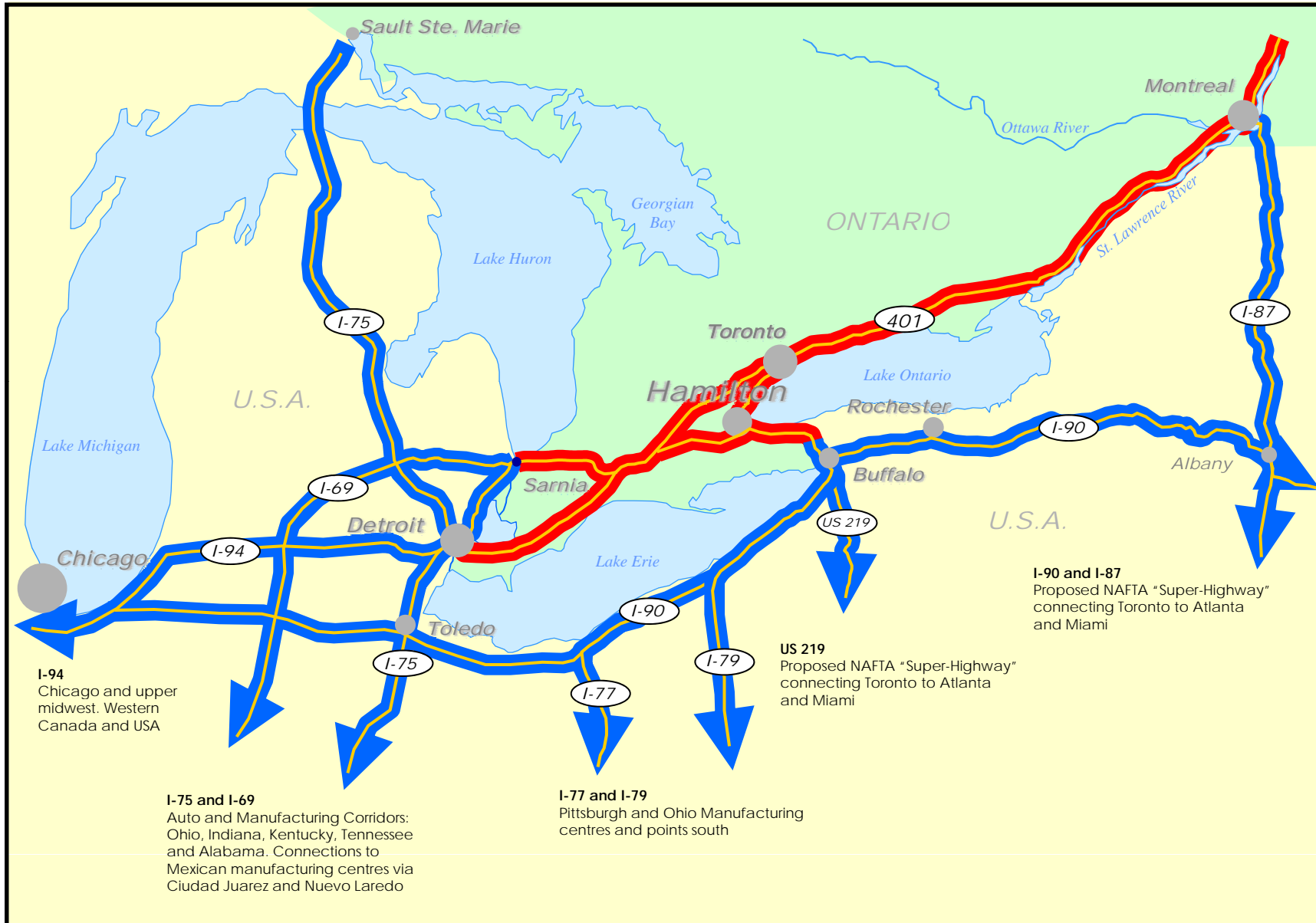
The City of Hamilton has excellent employment land prospects over the next 25 years. Hamilton is especially well-located to compete for employment land given its strategic location. The evolving regional land supply situation will provide further opportunities, as tightening employment land supplies in other established GTAH locations will strengthen demand for sites in Hamilton.

1. Hamilton Is Strategically Located at the Convergence of Major North American Trade Corridors

Within the GTAH, the City of Hamilton is well-positioned to accommodate employment growth because of its strategic location and transportation access. Because of the increased reliance of economic activity in the GTAH on truck transportation and efficient production systems, the location of new industrial development is increasingly dependent upon access to large development parcels and good transportation infrastructure, particularly roads.

As shown on the map on the following page, the City of Hamilton is strategically located near the convergence of major Canada–US trade corridors providing access to several interstate highways and markets in the United States. Hamilton also has excellent local transportation access via the Queen Elizabeth Way (QEW), Highways 403 and Highway 6, the HIA and the recently completed Red Hill Creek Expressway.

CITY OF HAMILTON IS PART OF A MAJOR NORTH AMERICAN TRADE SYSTEM



Source: Hemson Consulting Ltd.

NTS

2. The Evolving Regional Land Supply Will Provide Further Opportunities

Given the position of the GTAH relative to major US markets, the strongest demand for employment land over the past 20 years has been in communities in the western GTA, particularly southern Peel and Halton Regions. As a result, the supply of available development opportunities in these locations is becoming increasingly constrained.

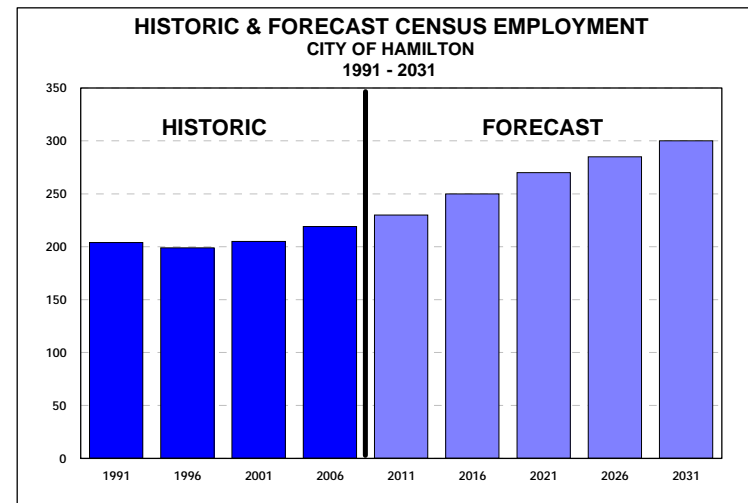
The price of industrial land has risen significantly in the GTA – West and demand is being pushed to more distant locations such as Waterloo Region, Guelph, and the Brantford area. The most rapid rise in land value has been observed for communities such as the Towns of Milton and Oakville, and locations around the Lester B. Pearson International Airport where the supply of employment land is nearly depleted.¹

The City of Hamilton's ability to provide large new development opportunities is a major advantage within this competitive environment, particularly with respect to users demanding good transportation access. As discussed in the CES, the City of Hamilton is particularly well suited to compete for growth in goods production and distribution industries, including those that may require access to air transport. We maintain the view that this type of development will make up a large share of new building activity in Hamilton's Employment Areas.

¹ For details see, City of Brampton Employment Land Strategy Discussion Paper prepared by Hemson Consulting Ltd. for the City of Brampton in November 2008.

3. Employment in the City of Hamilton Is Forecast to Grow to 300,000 Jobs by 2031

As a result of the community's strategic location and other competitive advantages, employment is forecast to grow to 300,000 jobs in 2031. This figure is the forecast shown in the *Growth Plan*, and reflects the anticipation that Hamilton will become an increasingly attractive location for economic development over time. As illustrated below, the forecast is for employment to grow steadily and at a somewhat more rapid rate than in the past.



Source: Hemson Consulting Ltd. and the Growth Plan for the Greater Golden Horseshoe, 2006.
Note: Employment figures for 2016 and 2026 are evenly pro-rated by Hemson Consulting Ltd.

C. NEARLY HALF OF FUTURE JOB GROWTH WILL BE EMPLOYMENT LAND EMPLOYMENT

The approach taken by Hemson Consulting Ltd. to forecasting employment growth is based on three land use-based categories—major office, population-related and employment land employment. The categories and their main characteristics are summarized below.

- **Major Office Employment** is employment contained within free-standing buildings over 20,000 net sq. ft. in size. This is distinct from the term “major office” as used in the *Growth Plan*.¹
- **Population-Related Employment** is employment that exists in response to a resident population that is primarily not located in Employment Areas or major office jobs. This category includes retail, education, health care, local government and work-at-home employment.

¹ For employment forecasting and most land use planning purposes, “major office” is traditionally defined as freestanding office buildings greater than 20,000 net sq. ft. (1,860 m²) in size. The Growth Plan uses the same expression — major office — for a different purpose. In the Growth Plan, major office policies address the desire to locate large office buildings of 10,000 m² (108,000 sq. ft.) or greater in transit-oriented locations to encourage greater transit use. Except as otherwise noted, this report’s use of major office is the 20,000 sq. ft. or more definition.

- **Employment Land Employment** refers to jobs accommodated in primarily low-rise industrial-type building space and multiples, the majority of which are located within Employment Areas.

It is for employment land employment where there is the most competition with other communities, and where land use planning and local economic development policy can have the strongest influence on the amount of employment growth that is captured:

- Population-related employment is driven by growth in local population and is accommodated within existing neighbourhoods and commercial areas and through the normal course of secondary planning for most new residential communities; and
- Major office employment occurs at very high densities and under unique market conditions, meaning that for most communities the land supply for major offices is virtually unlimited. Given the nature of major office development, its location is therefore driven mainly by market forces making it typically less responsive to planning policy.

The results of the updated forecast of employment by type are somewhat different than the CES, based upon the pattern of employment observed during the 2001 to 2006 Census period. Notwithstanding these differences, employment land employment is still anticipated to play a major role in accommodating economic activity in the City of Hamilton over the forecast period.

1. The CES Forecast Was for Employment Land Employment to Grow by 49,000 Jobs

The CES forecast that employment land employment in the City of Hamilton would grow by 49,000 jobs, accounting for 54% of the total employment growth over the period from 2001 to 2031. The forecast was based on the figures shown in the 2005 *Growth Outlook For the Greater Golden Horseshoe*, which formed the basis of the forecasts in Schedule 3 of the *Growth Plan*.¹

As described in the CES, the forecast is based on the expectation that the City of Hamilton will become an increasingly attractive location for industrial-type development over time, as a result of its location and forecast growth in the resident labour force. The original CES forecast of employment land employment growth between 2001 and 2031 is shown in Table 1.

¹ For details, see *The Growth Outlook for the Greater Golden Horseshoe*, Hemson Consulting Ltd, January 2005.

Type	2001	2031	Growth	Share
Major Office	13,000	24,000	11,000	12%
Population Related	92,000	123,000	31,000	34%
Employment Land	100,000	149,000	49,000	54%
Total Employment	205,000	296,000	91,000	100%

Source: City of Hamilton Comprehensive Employment Study, Hemson Consulting Ltd., November 2006, page 7.

2. Since the CES, the 2006 Census Employment Information Has Been Released

Since the CES was prepared, the full 2006 Census information was released. One of the most interesting features of the 2006 Census is the pattern of employment growth demonstrated since 2001.

Overall, employment in the GTAH grew somewhat slower than expected, at a rate of only 8% as opposed to the nearly 12% growth that was anticipated. The lower-than-expected growth was the result of a larger metropolitan-wide pattern where all of the large, fast-growing suburban communities at the edge of the GTAH fell short of expectations. As shown in Table 2 below, interestingly, the Cities of Toronto and Hamilton were the only communities to meet forecast expectations between 2001 and 2006.

Table 2			
Variation Between 2006 Census Employment and Growth Plan Forecast Employment			
Municipality	2006 Forecast	2006 Census*	Forecast Vs. Census
City of Toronto**	1,485,100	1,468,500	-16,500 -1%
Region of Peel	636,700	608,000	-28,800 -5%
Region of York	489,700	460,400	-29,400 -6%
Region of Durham	220,000	210,300	-9,700 -5%
Region of Halton	232,900	217,700	-15,200 -7%
City of Hamilton	216,400	219,200	+2,800 +1%
GTAH Total	3,280,900	3,184,100	-96,800 -3%

Source: Unpublished 2006 employment forecast results from the models used to prepare the reference forecast Compact Scenario distribution employment figures shown in Schedule 3 of the *Growth Plan*.

*Note 2006 Census employment is a Hemson Consulting Ltd. estimate and incorporates a GTA-wide redistribution of the “no fixed place of work” component of employment in accordance with shares of the other two types of employment — place of work employment and work-at-home employment.

**Note Given the size of the City of Toronto’s economy, a difference of only 1% between the 2006 forecast and Census employment is considered to be within the margin of error and, as a result, consistent with the 2006 forecast expectations.

More recent data is now indicating why this pattern has occurred: less employment growth has taken place on employment lands and somewhat more has taken place in population-related and office-type activities such as retail, health, education and public administration. During this same period, however, a significant increase in building space was observed, particularly in the Regions of Peel, York and Halton, where employment fell short of expectations.¹

The combination of relatively little employment growth in industrial-type activities and a significant increase in building space suggests an ongoing decline of employment land densities, which largely explains the geographical pattern of employment growth during the 2001–2006 period. There are examples of new employment land development in the Regions of Peel and Halton taking place at very low densities, often in the range of 12 to 15 employees per net ha. Some distribution centres can have on-site employment as low as one or two employees per net ha, however on any given day, there may be dozens of others in the building including truckers and employees of firms using the facility.²

¹For details see, City of Brampton Employment Land Strategy Discussion Paper prepared by Hemson Consulting Ltd. for the City of Brampton in November 2008.

²In Halton, observed densities in the range of 12 to 15 jobs per net ha are for highly automated distribution and warehousing facilities, although some facilities demonstrate even lower densities. For details see, Accommodating Growth to 2031: Sustainable Halton Phase 3 Report 3.07 prepared by Hemson Consulting Ltd. for the Region of Halton in April 2009.

3. Updated Forecast Takes into Account the Most Recent Census Information

The updated forecast of employment by type is prepared using the most recent Census information and within the context of the observed changes in the pattern of growth. Consistent with the CES, the updated analysis also indicates that employment land employment plays a very important role in the City of Hamilton economy:

- By type, employment land employment accounts for approximately 108,000 jobs, or nearly 50% of the City's total employment.
- A similar amount, an estimated 96,500 jobs, or approximately 44%, of the City's employment are population-related jobs throughout the community, including residential neighbourhoods and the downtown, but also within Employment Areas, primarily as retail and institutional use; and
- Only a relatively small amount of employment, approximately 14,500 jobs, or 7%, of the total employment is employment in major offices.

It is clear that employment land employment plays a major role in the City's economic base, and this relationship is anticipated to continue over the forecast period. As shown in Table 3, employment land employment is forecast to grow by 36,000 jobs over the period to 2031, which translates into approximately 45% of the total job growth.

Employment Type	2006	2031	Growth	Share
Major Office	14,500	27,500	13,000	16%
Population-related	96,500	128,300	31,800	39%
Employment Land	108,200	144,200	36,000	45%
Total	219,200	300,000	80,800	100%

Source: Hemson Consulting Ltd. based on Statistics Canada, Census of Canada.

As can be seen by comparing Tables 1 and 3, the updated employment land employment forecast of 36,000 jobs is less than the CES forecast of 49,000 jobs. There are a number of reasons for this difference:

- Firstly, the CES forecast was for a longer period, 30 years from 2001 to 2031, meaning a higher overall forecast of employment. The updated employment forecast is for a shorter 25-year period, 2006–2031, and therefore less overall growth;
- Hamilton also exceeded forecast expectations for the 2001 to 2006 Census period, further reducing the growth increment from 2006 to 2031; and
- A lower share of growth is forecast for employment land employment to 2031 — 45% of total growth, as shown in Table 3, compared to 54% in the CES.

On the last point, it is worth repeating that the lower share of growth for employment land employment reflects information from the 2006 Census, particularly information showing that industrial-type activities had little net growth in the GTAH between 2001 and 2006. Given our view that the overall GTAH *Growth Plan* employment forecast remains sound, the three categories of employment required shifting. The result is somewhat more growth forecast for employment in population-related and office-type activities.

Consistent with the *Growth Plan*, however, Hamilton is still planning to accommodate a total 2031 employment of 300,000 jobs, representing growth of approximately 80,000 jobs from the 2006 level of 220,000 jobs. Consistent with the CES, employment land employment is forecast to account for a large share of the growth forecast, although the amount is somewhat less because of a shorter time period and shifts in the pattern of growth.

It will be difficult for the City of Hamilton to accommodate significantly more major office employment than is anticipated in the updated forecast. The GTAH office market is highly competitive and the existing office nodes have well-established roles in the regional market and an abundant capacity to accommodate development.

Likewise, the amount of anticipated population-related employment growth is also relatively fixed as it is related to demand for goods and services from the planned local population. Growth in population-related employment typically occurs in existing locations, such as hospitals and universities, as well as on new commercial and institutional land designed through the secondary and block planning processes for new residential communities.

The City of Hamilton's ability to accommodate future employment growth, therefore, rests largely on its ability to provide an appropriate supply of employment land and therefore lands within Employment Areas. Accordingly, the next chapter turns to a discussion of the City's current supply of Employment Area lands and whether or not it is sufficient to accommodate future demand.

III THE CURRENT LAND SUPPLY IS NOT SUFFICIENT TO ACCOMMODATE FUTURE DEMAND

This chapter discusses the adequacy of Hamilton's Employment Area land supply to accommodate the growth forecast discussed in the previous chapter. For this study, the current Employment Area land supply, as defined by the City of Hamilton, is lands located within the 6 greenfield Business Parks and the 7 Industrial Areas:

- The 6 Business Parks are the Airport, Ancaster, Flamborough, Mountain, North Glanbrook and Stoney Creek Business Parks; and
- The 7 Industrial Areas are the Bayfront, East Hamilton, the West Hamilton Innovation District (WHID) and the Dundas, Hester, Rifle Range and Stuart Street Industrial Areas.

The current land supply for each of these areas is based on the updated supply prepared by the City of Hamilton staff in 2007 and described in a June 2008 report prepared by Dillon Consulting Ltd.¹ In 2008, the supply was further updated by City of Hamilton staff to reflect more detailed mapping of environmental and natural features.

¹ For details, see City of Hamilton Employment Land Budget Update Report, prepared by Dillon Consulting Ltd. 2008. The land supply for the Stuart Street Industrial Area is not included and has been estimated by Hemson Consulting Ltd.

The City's updated 2008 land inventory includes two key updates from the CES, which are:

- More detailed information on the occupied and vacant land supply in the City's Industrial Areas. Such information was not available for the CES; and
- A refinement of the boundaries of some Employment Areas to better reflect the land use designations in the approved and in-force local official plans, including the removal of lands planned exclusively for airport uses in the Airport Business Park, as well as lands approved for commercial uses in some of the City's Business Parks and Industrial Areas.²

The 2008 inventory differs from the lands identified as Employment Areas on Schedule E-1 to the City's urban official plan (Urban Land Use Designations), which excludes certain sites identified for conversion to non-employment uses. Such sites are included in the current land supply, for purposes such as calculating employment densities, but are removed for the purposes of estimating future land need.

² The supply of employment land used in the 2006 CES report was based on the former Regional official plan Business Park designation.

It is important to note that the analysis of supply and demand is undertaken in terms of *net land area* — which is defined as the area of the actual buildings and building lots. The net land area excludes roads, storm water management ponds and other services which tend to be roughly 20% of the *gross land area*, which excludes non-developable areas such as natural features, hydro corridors and buffers.

The net land area is used to provide a common base for measurement and analysis. The results can be restated to any number of other definitions, including the definition of density in the *Growth Plan*.¹ The City's greenfield density calculation will need to include other employment and residential land uses and be undertaken using the *Growth Plan* definition of density and land areas.

Demand for Employment Area land is estimated by applying a net density factor to the forecast of employment growth by type, and accounting for long-term vacancy and land under-utilization in the Employment Areas over time. Similar to the CES, the year-end 2008 supply is restated to Census day 2006 to enable comparison to the updated growth forecast for the 2006 to 2031 period. This approach is considered to be more reliable than estimating 2008 employment, particularly given current economic uncertainties.

¹ *The definition of density is provided in Section 2.2.7.3 of the Growth Plan, and only excludes provincially significant natural features where relevant policies would prohibit development.*

A. HAMILTON HAS A TOTAL SUPPLY OF 3,300 NET HA OF EMPLOYMENT AREA LAND

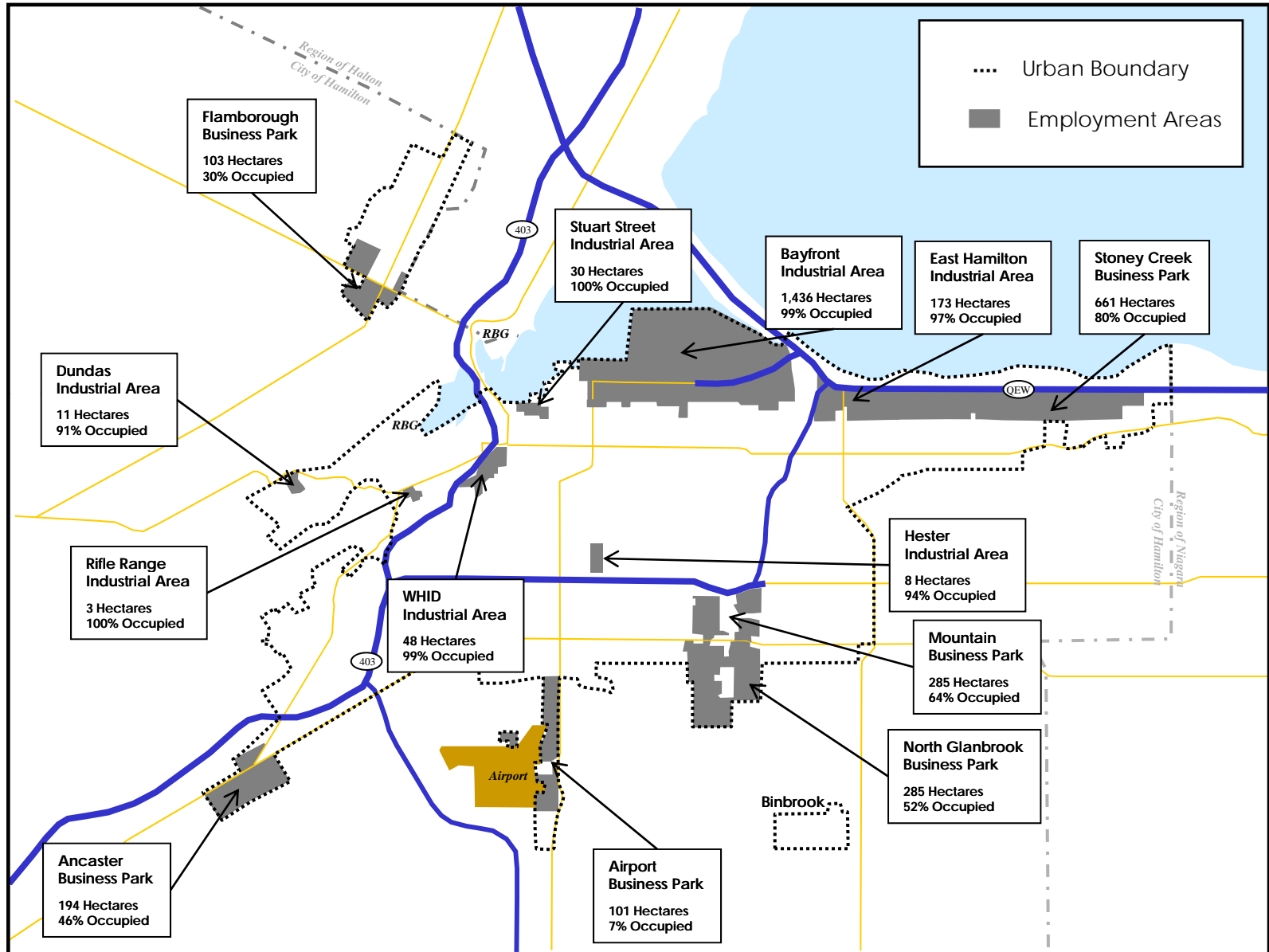
The City of Hamilton has an estimated total Employment Area land supply of approximately 3,300 net ha, divided about evenly between the City's Industrial Areas and Business Parks. The Employment Area land supply is summarized in Table 4 and illustrated on the following page. Details are provided in the Appendix to this report.

Employment Areas (Ha)	Business Parks	Industrial Areas*	Total Supply
Net Occupied Area	950	1,690	2,640
Net Vacant Area	620	20	640
Total Area (ha)	1,570	1,710	3,280

Source: Hemson Consulting Ltd. based upon City of Hamilton data.

*Note: Supply includes some sites identified for conversion over the long term, such as the Stuart Street Industrial Area, which is part of the City's *Setting Sail* secondary plan, the Rifle Range Industrial Area, a portion of the Hester Street Industrial Area, and other sites approved for conversion by Hamilton Council. These sites are included in the current Employment Area supply but are removed for the purposes of estimating future land need.

CITY OF HAMILTON CURRENT EMPLOYMENT AREA LAND SUPPLY



Source: Hemson Consulting Ltd., based on *City of Hamilton Employment Land Budget Update Report*, Prepared by Dillon Consulting Ltd. June 3, 2008, as updated by City of Hamilton in 2008. Land supply reflects designations at the time of writing that are shown in the in-force area municipal official plans. Land areas shown and location of urban boundary are conceptual. For precise land areas and designations, please refer to relevant municipal official plans.

NTS

As can be seen from the table and the map, virtually all of the City's vacant land supply is in the greenfield Business Parks. Contrary to popular perception, the City's Industrial Areas are nearly 100% occupied. Only 21 net vacant ha are available for development, located almost entirely in the Bayfront (14 net vacant ha) and East Hamilton (6 net vacant ha) Industrial Areas.

As a result of this development pattern, the capacity of the Industrial Areas to accommodate employment growth is limited. Consistent with the CES and the experience of other GTA/H communities, most of Hamilton's employment land employment growth, as well as some office and population-related uses, is anticipated to be accommodated on greenfield Employment Area lands.

B. DEMAND EXCEEDS SUPPLY BY NEARLY 700 NET HA OR OVER 800 GROSS HA

Hamilton's Employment Area land need is estimated by applying a density factor to the forecast of employment by type, including major office and population-related employment. The method used is similar to the CES, in that the supply is restated to a common base to enable an appropriate comparison between supply and demand. Factors for long-term land vacancy and under-utilization are also taken into account, including sites anticipated to change to non-employment use over time (conversion).

1. Employment Area Land Supply Is Restated to Census Day 2006

The year-end 2008 Employment Area land supply is restated to Census-day 2006 based upon an estimate of employment land absorption over this period. The estimated Census day 2006 land supply is shown below in Table 5.

Table 5	
Estimate of City of Hamilton Employment Area Land Supply, Census Day 2006	
Year-End 2008 Supply Summary	Net ha
Occupied Employment Area Land	2,640
Vacant Employment Area Land	640
Total	3,280
Year-End 2008 Supply Restated to Census-Day 2006	Net ha
Estimated Land Absorption, Census Day 2006 to year-end 2008*	85
Occupied Employment Area Land Supply	2,550
Vacant Employment Area Land Supply	730
Total Employment Area Land Supply (Mid-2006)	3,280

Source: Hemson Consulting Ltd. based on information provided by the City of Hamilton

*Note: Absorption estimated based on information provided by the City of Hamilton. Details are provided in the Appendix to this report.

2. Demand Is Estimated by Applying a Density to the Forecast of Employment by Type

Demand for employment land is estimated by applying a density of 37 jobs per net ha to the forecast employment land employment growth, consistent with the approach taken in the CES and considerably higher than currently observed densities in the City of Hamilton.

A small amount of population-related employment is included in the estimate, as well as some major offices, reflecting observed patterns of development in other GTA/H communities. The method used to incorporate these uses is somewhat different than in the CES but consistent with the approach we have taken in recent growth management exercises and *Growth Plan* conformity planning for other communities, in particular the Region of Halton.¹

As shown in Table 6 on the following page, the City of Hamilton will require an estimated 960 net ha of Employment Area lands to accommodate employment growth to 2031. Most of this need will be for employment land but will also include a small component of population-related uses and major office. A number of key points warrant attention with respect to the updated analysis:

- The estimate of land need is for lands within the Employment Areas, as defined by the City of Hamilton, which include pure employment land employment as well as a small component of population-related employment and offices;
- As discussed in the CES, the population-related employment is not large -format or “big box” retail jobs, but rather the range of service–commercial activities that tend to locate within Employment Areas, including the accessory and ancillary uses permitted in the City’s urban official plan, such as hotels, health and recreation facilities and commercial parking facilities; and
- Only a limited amount of major office employment is included in the estimate of land need. Consistent with the *Growth Plan*’s objective to focus major offices in the UGCs, Hamilton’s urban official plan restricts major offices in the Employment Areas, with the exception of planned lands around the HIA.

Reflecting this policy direction, approximately one-third of the forecast growth in major office employment is allocated to the Employment Areas, which is different than the current pattern of development. Historically, almost all of the demand for offices in the GTA/H outside of the City of Toronto has been for sites within designated Employment Areas, particularly locations with superior transportation access.²

¹ For details see, *Accommodating Growth to 2031: Sustainable Halton Phase 3 Report 3.07 prepared by Hemson Consulting Ltd. for the Region of Halton in April 2009.*

² For details see, *City of Brampton Employment Land Strategy Discussion Paper prepared by Hemson Consulting Ltd. for the City of Brampton in November 2008.*

Table 6				
Estimated Employment Area Land Need City of Hamilton 2006 to 2031				
Component of Estimate	Type of Employment			Total
	Employment Land	Major Office	Population-Related	
Employment Growth 2006-2031	36,000	13,000	31,800	80,800
Share of growth in Employment Areas	95%	35%	5%	50%
Employment Growth in Employment Areas	34,200	4,600	1,600	40,400
Density (Jobs/net ha)	37	250	85	42
Land Demand (net ha)	920	20	20	960
Share of Total Land Demand	96%	2%	2%	100%

Source: Hemson Consulting Ltd. based on Statistics Canada and other available information

Notes: Density of 37 jobs per net ha for employment land is consistent with actual densities observed in other GTA/H communities and density factor applied to employment land employment in the CES. The share of 95% growth in the Employment Areas reflects the anticipation that a small amount (5%) of employment land employment land will be accommodated in rural areas, consistent with currently observed patterns.

Density of 250 jobs per net ha for major office is based on 70% coverage and 28 square metres per employee.

Density of 85 jobs per net ha for population-related employment is based on 35% coverage and 40 square metres per employee — this is an estimate of service commercial uses that tend to locate within Employment Areas including the ancillary and accessory uses permitted in the Employment Areas in Hamilton's urban official plan.

3. Current Supply Is Not Sufficient to Accommodate Forecast Demand

As shown in Table 7, the current supply of land within the Employment Areas is not sufficient to accommodate future demand. With respect to the method used to reach this conclusion, two key points warrant attention:

- The full employment capacity of the land base is estimated to occur at 90% development. This is a standard factor made up of: a 5% long-term vacancy factor — lands that will never develop; and a 5% land under-utilization factor — lands developed now, but which will be either occupied at lower employment densities or will have changed from employment to non-employment use by 2031.
- In the CES, land under-utilization was characterized as “declines in the existing base” and calculated as a share of employment land employment. Similarly, long-term vacancy was calculated as a share of the Business Park lands supply as opposed to the entire land supply. While the method is different, both factors are taken into account in this updated analysis.

Differences in method aside, the overall conclusions are the same. There is a fairly significant shortage of employment land to 2031; 660 net ha to 2031. This total land need is somewhat less than the 825 net ha estimated in the 2006 CES, again because the updated forecast of employment land employment is lower.

Component of Estimate	Net Ha
Occupied Employment Area Land	2,550
Vacant Employment Area Land	730
Total Employment Area Land (Census Day 2006)	3,280
Adjusted for Approved Conversion Sites* (Removal of Approximately 115 Net Ha)	3,160
Occupied Land Area of Existing Employment Areas at 2031 — Adjusted Area at 90% Occupancy	2,850
Occupied Employment Area Land, 2006	2,550
Employment Area Land Demand, 2006 to 2031	960
Total Occupied Land Area in 2031	3,510
Occupied Land Area of 2006 Supply in 2031	2,850
Shortfall (In Net ha)	(660)
Total Land Need, in Gross Ha, Using an 80% Net-to-gross Conversion Factor	(830)

Source: Hemson Consulting Ltd. based on Statistics Canada and information provided by the City of Hamilton.

*Note: The conversion sites are: the 30 net ha Stuart Street area (converted through the *Setting Sail* secondary plan), and the approximately 85 net ha of staff approved and Council requested conversion sites, which includes the “return” of approximately 5 net ha to an Employment Area designation in the Hester Street Industrial Area.

C. LAND NEED SHOULD NOT BE REDUCED BY PLANNING FOR HIGHER DENSITIES

In order to accommodate future employment growth, the City of Hamilton needs to designate approximately 830 gross additional ha of Employment Area lands. While, in theory, the overall land need can be reduced by planning for higher densities, this approach is not recommended.

1. Current Employment Land Density Is Below Provincial Growth Plan Targets

As shown in Table 8, the City's overall density of Employment Area land is estimated to be approximately 27 jobs per net ha, or just over 20 jobs per gross ha as defined in the *Growth Plan* and considerably lower than its target of 50 residents and jobs combined. The City-wide density is made up of a density of approximately 29 jobs per net ha in the City's Business Parks and a density of 26 jobs per net ha in the City's Industrial Areas.

The estimated overall density of 29 jobs per net ha in the Business Parks is somewhat lower than that in the CES, which estimated the density to be 31 jobs per net ha. The density of 27 jobs per net ha is somewhat higher than one may expect for Industrial Areas, the result of higher densities observed in some of the smaller areas. The large Bayfront area, which makes up most of the Industrial Area land supply, is estimated to be occupied at a density of 23 jobs per ha. Detailed density information is provided in the Appendix to this report.

	Jobs	Occupied Net ha	Density Jobs/net ha
Industrial Areas	44,200	1,680	26
Business Parks	25,500	870	29
City-wide	69,700	2,550	27

Source: Hemson Consulting Ltd. based upon Statistics Canada and information provided by City of Hamilton

It is important to note that there are some limitations to the density analysis. Some municipalities in the GTAH, such as the Regions of Peel and York, have the benefit of detailed municipal employment surveys to assist in the calculation of densities. In the City of Hamilton, such a survey has not been undertaken so densities are estimated based on 2006 Census data by economic sector and Census Tract.

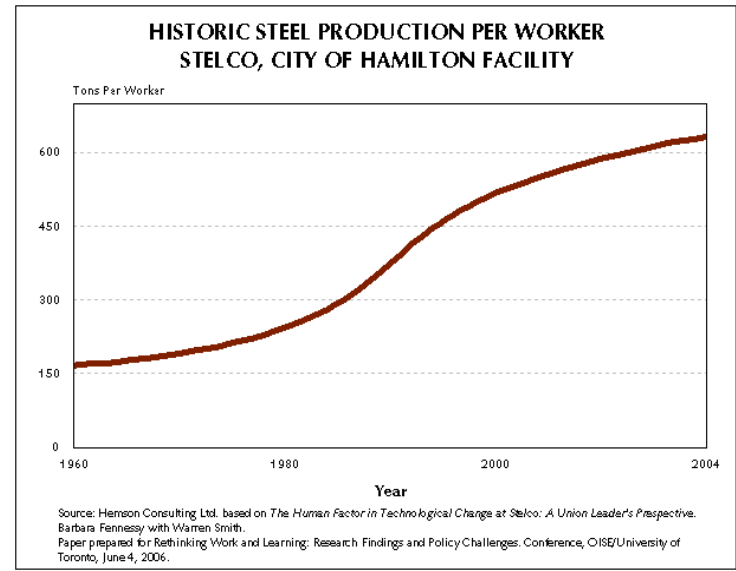
In some cases, such as the Bayfront Industrial Area, the Census Tract boundaries match closely with the Employment Area boundary. In others, such as the Flamborough And Ancaster Business Parks, the Census Tract boundaries are much larger, so employment is estimated based on our best judgement of the share of employment by economic sector likely to be accommodated within each Employment Area. Given these limitations, more detailed analysis may be required to confirm the results shown in Table 8.

2. Trends Suggest That the Density of Employment Land Is Declining

In any event, the results of the updated density analysis are reasonably consistent with the CES and the profile of the City's economic base. And, despite planning objectives to the contrary, economic trends indicate that densities on employment land are declining and likely to continue to decline as a result of two factors:

- Over the forecast period, Hamilton's overall employment land densities are likely to decline because of the continued development of larger and more efficient industrial buildings, which in other GTAH communities are being built at densities much lower than the current City-wide density; and
- The employment density of existing areas, particularly the Industrial Areas, will decline. Most Employment Areas in the GTAH follow a pattern of maximizing employment densities when first built, and then after a couple of decades begin to decline in employment density as buildings age.

Since approximately half of the City's Employment Area land supply is made up of Industrial Areas, the latter type of decline is even more likely to occur. A particularly good example can be taken from the experience of the former Stelco facility. As illustrated in the following graph, historic steel production per worker has risen steadily since 1960. Since the land area occupied by the facility has not changed and employment has declined, rising productivity suggests that steel production has occurred at lower and lower employment densities over the last 40 years.



The challenge of reducing the land taken up by industrial-type development by increasing densities is now acknowledged by many planners, including the Province. In the Province's recent report on employment land, it is noted that:

The manufacturing sector is expected to continue to be a major contributor to the economy of the Greater Golden Horseshoe and the whole of Ontario. Productivity is expected to continue to grow in this sector, primarily due to new technologies and increases in production efficiencies.

Research shows that the Greater Golden Horseshoe is following North American and global trends of building bigger and more efficient industrial facilities that house fewer employees, particularly in the logistics and distribution sectors. So, even as employment density (jobs per hectare) in manufacturing declines, it is expected that this important economic sector will continue to generate significant land demand.¹

3. Planning for Higher Employment Land Densities Simply Understates Land Need

While planning for higher employment land densities would reduce the overall land need and make *Growth Plan* conformity more feasible, in our view this simply results in an understatement of land need.

Similarly, attempts to exclude low-density uses locally may have the desired effect in terms of achieving the *Growth Plan* density target, but would simply shift those uses to other locations, including other communities and rural areas. Low density uses such as warehousing and distribution are necessary and important parts of the central Ontario economy. Simply shifting such uses to other locations provides no planning benefit to the metropolitan region, while potentially introducing economic inefficiencies.

¹ Planning for Employment in the Greater Golden Horseshoe *Background Paper*, May 2008, prepared by the Ontario Growth Secretariat, Ministry of Public Infrastructure Renewal, Province of Ontario.

The introduction of additional costs to businesses would impede the economic efficiency of these activities and, in turn, make the Provincial vision for economic growth more difficult to achieve. And again, while such an approach would make it easier to conform to the *Growth Plan* density target, it could have negative implications for the economic competitiveness of the GTA in North America and the competitiveness of Hamilton within the GTA.²

We maintain the view that a density of 37 jobs per net ha is an appropriate factor to be used for employment land planning in Hamilton. It is higher than existing densities, consistent with the CES, and consistent with densities in other GTA communities. We also continue to support the use of long-term vacancy and land under-utilization factors in planning for Employment Areas, as these factors are based on observed patterns of development.

An even greater shortage of Employment Area lands could be shown using lower employment land densities and taking into account more significant declines in the land base. Accordingly, we are of the view that the estimate of land need provided in this report is conservative, and is a reasonable basis for long-range planning for employment in the City of Hamilton.

² It may also result in a redirection of growth to communities less able to manage it. The GTA is very well prepared to manage growth given current infrastructure systems and the ability of Lake Ontario to provide services to existing urban concentrations.

IV CONCLUSIONS

The City of Hamilton is forecast to accommodate significant employment growth over the period to 2031, nearly half of which will be employment land employment. In order to accommodate this demand, Hamilton will need to retain virtually all of the current Employment Area land supply as well as designate additional supply.

Approximately 660 net ha or 830 gross ha of new Employment Area lands are required in addition to current designations. In our view, this land need should not be reduced by planning for higher densities or by assuming a significant level of employment intensification in existing Employment Areas. Land use planning cannot significantly control or direct employment densities and the City's Industrial Areas are fully occupied.

As noted in the CES, in order to avoid over-designating new land for future urban development, development phasing can be incorporated into future secondary plans, including the plan for the Airport Employment Growth District (AEGD). It should also be noted that long-term land designation does not, in itself, "create" the market. The take-up of new Employment Area lands will only be as fast as the demand for economic development and new buildings dictates.

What the designation of an appropriate long-term land supply *does* mean, however, is that the City of Hamilton will be in a sound position to compete for new economic investment, thereby advancing the *Growth Plan's* objectives for economic vitality.

The next step is for the City of Hamilton to consider the estimate of Employment Area land need presented in this report in the context of its other plans, in particular plans for the designated greenfield areas. The City will need to demonstrate how the *Growth Plan* target of 50 residents and jobs per ha can be met across the City's entire greenfield area, including proposed Employment Area, residential and commercial land designations.

The amount of Employment Area lands ultimately designated as part of Hamilton's official plan will be dependent on, among other matters, the City's ability to conform to the *Growth Plan* density and other quantitative targets. As a result, the recommendations of this study may need to be revised through further analyses. We trust that this report is of assistance to the City of Hamilton staff and Council as they look forward to the future.

Appendix

Detailed Land Supply and Density Information

City of Hamilton Summary

A. City of Hamilton		
Employment Area Land Supply		
Property Use	Gross Acres	Gross Hectares
Residential < 1 acre	166	67
Residential/Structure > 1 acre	-	-
Utilities (Undevelopable)	888	359
Institutional	136	55
Office	47	19
Retail	258	104
Warehouse/Storage	269	109
Light Industry	392	159
Medium Industry	2,070	838
Heavy Industry	2,318	938
Farm with Retail/Industrial Uses	120	49
Parking Lots	17	7
Stuart Street Industrial Area	74	30
Subtotal Occupied Area	6,756	2,734
Vacant Occupied	63	25
Non-Developable	284	115
Subtotal Gross Non-Developable Lands	7,104	2,875
E-1 Schedule Removed Occupied	295	120
Total Gross Non-Developable Lands	6,808	2,755
Property Use		
Vacant Unoccupied	76	31
Total Gross Developable Lands	1,785	722
Total Gross Area	8,593	3,477

C. City of Hamilton		
Net Employment Area Land Supply		
Updated Land Needs Analysis		
Gross Vacant Ha		722
Gross to Net Adjustment		
CES Net Vacant Acres	2,307	
CES Gross Vacant Acres	2,622	
CES Gross to Net Factor	88%	
Net Vacant Ha		642
Net Occupied Ha	2,640	
Total Net Occupied & Vacant Ha	3,282	

E. City of Hamilton				
Density Estimate				
Net Occupied	Net Vacant	Total	Employment	Density
2,554	728	3,282	69,668	27

D. City of Hamilton	
Net Employment Area Land Supply Restated to Census Day 2006	
Total Employment Area Land Absorption (net ha)	86
Net Vacant Ha, Mid-Year 2006	728
Net Occupied Ha, Mid-Year 2006	2,554
Total Supply, Net Ha, Mid-Year 2006	3,282

B. City of Hamilton															
2006 Total Employment by NAICS & Census Tract															
North American Industry Classification System															
Industrial Area / Business Park	Percent of Total Employment Within IA/BP	Construction		Wholesale		Transportation & Business		Education / Culture / Rec / Acc		Public		Total			
		Primary	& Utilities	Manufacturing	Trade	Retail Trade	Warehousing & Related	FIRE	Health / Social / Food	Other	Administration				
Airport & North Glanbrook	100%	-	97	70	59	-	2,081	66	-	-	27	48	2,448		
Ancaster	100%	-	152	333	219	370	201	230	-	56	346	126	2,032		
Flamborough	100%	-	154	256	156	150	93	-	-	82	172	10	1,073		
Mountain	100%	16	1,534	849	523	710	51	475	162	148	518	395	5,654		
Stoney Creek	100%	-	2,031	5,402	2,156	547	1,596	941	319	343	317	510	14,298		
Bayfront	100%	65	2,726	18,780	1,835	1,379	1,583	1,786	303	1,183	1,072	1,092	32,721		
Dundas	100%	-	110	199	53	41	-	61	38	-	-	27	530		
East Hamilton	100%	16	921	2,538	1,046	742	747	565	149	507	496	450	8,333		
Hester	100%	-	21	31	-	56	13	-	-	172	18	82	394		
Rifle Range	100%	-	31	435	16	66	-	-	-	-	27	45	620		
WHID	100%	-	167	212	37	24	249	719	-	156	-	-	1,564		
Total Employment	100%	98	7,944	29,105	6,100	4,084	6,614	4,843	971	2,566	2,877	2,927	1,540	69,668	

***Summary Employment Land Area Absorption
Excludes Commercial Designated Lands***

Area	June 06 - 07	June 07 - Year end	Jan - Dec 2008	Total
Bayfront	5	0	-	5
Dundas	-	-	-	-
East Hamilton	-	-	-	-
Hester	-	-	-	-
Rifle Range	-	-	-	-
WHID	0	-	-	0
Airport	-	-	-	-
Ancaster	38	-	1	39
Flamborough	1	-	1	2
Mountain	1	-	1	1
North Glanbrook	1	1	-	2
Stoney Creek	18	17	1	36
Industrial Areas	6	0	-	6
Business Parks	58	18	4	80
City of Hamilton	64	18	4	86

Business Parks Summary

A. Business Parks		
Employment Area Land Supply		
Property Use	Gross Acres	Gross Hectares
Residential < 1 acre	117	47
Residential/Structure > 1 acre	-	-
Utilities (Undevelopable)	376	152
Institutional	91	37
Office	38	16
Retail	155	63
Warehouse/Storage	134	54
Light Industry	276	112
Medium Industry	1,028	416
Heavy Industry	232	94
Farm with Retail/Industrial Uses	120	49
Parking Lots	-	-
Subtotal Occupied Area	2,567	1,039
Vacant Occupied	-	-
Non-Developable	256	104
Subtotal Gross Non-Developable Lands	2,824	1,143
E-1 Schedule Removed Occupied	215	87
Total Gross Non-Developable Lands	2,609	1,056
Property Use		
Vacant Unoccupied	-	-
Total Gross Developable Lands	1,733	701
Total Gross Area	4,341	1,757

C. Business Parks	
Net Employment Area Land Supply	
Updated Land Needs Analysis	
Gross Vacant Ha	701
Gross to Net Adjustment	
CES Net Vacant Acres	2,307
CES Gross Vacant Acres	2,622
CES Gross to Net Factor	88%
Net Vacant Ha	621
Net Occupied Ha	952
Total Net Occupied & Vacant Ha	1,573

D. Business Parks	
Net Employment Area Land Supply Restated to Census Day 2006	
Total Employment Area Land Absorption (net ha)	80
Net Vacant Ha, Mid-Year 2006	701
Net Occupied Ha, Mid-Year 2006	872
Total Supply, Net Ha, Mid-Year 2006	1,573

E. Business Parks				
Density Estimate				
Net Occupied	Net Vacant	Total	Employment	Density
872	701	1,573	25,506	29

B. Business Parks														
2006 Total Employment by NAICS & Census Tract														
North American Industry Classification System														
Business Park	Percent of Total Employment Within BP	Construction											Total	
		Primary	& Utilities	Manufacturing	Wholesale Trade	Retail Trade	Transportation & Warehousing	Business & Related	FIRE	Education / Health / Social	Culture / Rec / Acc / Food	Other		Public Administration
Airport & North Glanbrook	100%	-	97	70	59	-	2,081	66	-	-	-	27	48	2,448
Ancaster	100%	-	152	333	219	370	201	230	-	56	346	126	-	2,032
Flamborough	100%	-	154	256	156	150	93	-	-	-	82	172	10	1,073
Mountain	100%	16	1,534	849	523	710	51	475	162	148	518	395	272	5,654
Stoney Creek	100%	-	2,031	5,402	2,156	547	1,596	941	319	343	317	510	136	14,298
Total Employment	100%	16	3,967	6,910	3,112	1,777	4,022	1,712	481	548	1,263	1,231	467	25,506

Industrial Areas Summary

A. Industrial Areas		
Employment Area Land Supply		
Property Use	Gross Acres	Gross Hectares
Residential < 1 acre	50	20
Residential/Structure > 1 acre	-	-
Utilities (Undevelopable)	512	207
Institutional	45	18
Office	9	4
Retail	103	42
Warehouse/Storage	135	55
Light Industry	117	47
Medium Industry	1,042	422
Heavy Industry	2,086	844
Farm with Retail/Industrial Uses	-	-
Parking Lots	17	7
<i>Stuart Street Industrial Area</i>	<i>74</i>	<i>30</i>
Subtotal Occupied Area	4,189	1,695
Vacant Occupied	63	25
Non-Developable	28	11
Subtotal Gross Non-Developable Lands	4,280	1,732
E-1 Schedule Removed Occupied	81	33
Total Gross Non-Developable Lands	4,199	1,699
Property Use		
Vacant Unoccupied	76	31
Total Gross Developable Lands	52	21
Total Gross Area	4,252	1,721

C. Industrial Areas	
Net Employment Area Land Supply	
Updated Land Needs Analysis	
Gross Vacant Ha	21
Gross to Net Adjustment	
CES Net Vacant Acres	n/a
CES Gross Vacant Acres	n/a
CES Gross to Net Factor	100%
Net Vacant Ha	21
Net Occupied Ha	1,688
Total Net Occupied & Vacant Ha	1,709

D. Industrial Areas	
Net Employment Area Land Supply Restated to Census Day 2006	
Total Employment Area Land Absorption (net ha)	6
Net Vacant Ha, Mid-Year 2006	27
Net Occupied Ha, Mid-Year 2006	1,682
Total Supply, Net Ha, Mid-Year 2006	1,709

E. Industrial Areas				
Density Estimate				
Net Occupied	Net Vacant	Total	Employment	Density
1,682	27	1,709	44,162	26

B. Industrial Areas															
2006 Total Employment by NAICS & Census Tract															
North American Industry Classification System															
Industrial Area	Percent of Total Employment Within IA	Construction & Utilities													Total
		Primary	Manufacturing	Wholesale Trade	Retail Trade	Transportation & Warehousing	Business & Related	FIRE	Education / Health / Social	Culture / Rec / Acc / Food	Other	Public Administration			
Bayfront	100%	65	2,726	18,780	1,835	1,379	1,583	1,786	303	1,183	1,072	1,092	916	32,721	
Dundas	100%	-	110	199	53	41	-	61	38	-	-	27	-	530	
East Hamilton	100%	16	921	2,538	1,046	742	747	565	149	507	496	450	157	8,333	
Hester	100%	-	21	31	-	56	13	-	-	172	18	82	-	394	
Rifle Range	100%	-	31	435	16	66	-	-	-	-	27	45	-	620	
WHID	100%	-	167	212	37	24	249	719	-	156	-	-	-	1,564	
Total Employment	100%	81	3,976	22,195	2,988	2,307	2,592	3,131	490	2,018	1,614	1,696	1,073	44,162	

Bayfront Summary

A. Bayfront Industrial Area		
Employment Area Land Supply		
Property Use	Gross Acres	Gross Hectares
Residential < 1 acre	49	20
Residential/Structure > 1 acre	-	-
Utilities (Undevelopable)	445	180
Institutional	12	5
Office	6	2
Retail	56	23
Warehouse/Storage	69	28
Light Industry	30	12
Medium Industry	793	321
Heavy Industry	2,022	818
Farm with Retail/Industrial Uses	-	-
Parking Lots	17	7
Subtotal Occupied Area	3,498	1,416
Vacant Occupied	60	24
Non-Developable	2	1
Subtotal Gross Non-Developable Lands	3,560	1,441
E-1 Schedule Removed Occupied	45	18
Total Gross Non-Developable Lands	3,516	1,423
Property Use		
Vacant Unoccupied	35	14
Total Gross Developable Lands	34	14
Total Gross Area	3,550	1,437

C. Bayfront Industrial Area	
Net Employment Area Land Supply	
Updated Land Needs Analysis	
Gross Vacant Ha	14
Gross to Net Adjustment	
CES Net Vacant Acres	n/a
CES Gross Vacant Acres	n/a
CES Gross to Net Factor	100%
Net Vacant Ha	14
Net Occupied Ha	1,422
Total Net Occupied & Vacant Ha	1,436

E. Bayfront Industrial Area				
Density Estimate				
Net Occupied	Net Vacant	Total	Employment	Density
1,416	19	1,436	32,721	23

D. Bayfront Industrial Area	
Net Employment Area Land Supply Restated to Census Day 2006	
Total Employment Area Land Absorption (net ha)	5
Net Vacant Ha, Mid-Year 2006	19
Net Occupied Ha, Mid-Year 2006	1,416
Total Supply, Net Ha, Mid-Year 2006	1,436

B. Bayfront Industrial Area														
2006 Total Employment by NAICS & Census Tract														
North American Industry Classification System														
Census Tract	Percent of Total Employment Within IA	Primary	Construction & Utilities	Manufacturing	Wholesale Trade	Retail Trade	Transportation & Warehousing	Business & Related	FIRE	Education / Health / Social	Culture / Rec / Acc / Food	Other	Public Administration	Total
56.00	100%	-	157	316	176	151	45	56	26	144	175	33	10	1,289
57.00	100%	-	94	41	32	78	13	50	-	21	79	27	-	437
59.00	100%	11	157	83	37	167	70	64	78	43	98	88	-	895
60.00	100%	-	63	83	69	151	51	46	73	247	235	55	-	1,073
61.00	100%	-	248	539	11	94	13	62	-	107	80	71	16	1,240
63.00	100%	-	21	104	37	308	-	96	32	111	121	93	471	1,395
67.00	100%	11	325	1,253	288	47	217	266	-	206	59	132	345	3,149
68.00	100%	11	366	5,184	213	57	166	440	11	32	21	110	-	6,612
69.00	100%	22	372	9,866	486	42	262	383	11	-	11	88	-	11,541
70.00	100%	11	368	860	320	73	472	147	32	53	79	214	63	2,693
71.00	100%	-	220	171	112	209	83	176	42	219	114	181	10	1,537
66.00	46%	-	335	280	53	-	192	-	-	-	-	-	-	860
Total Employment	100%	65	2,726	18,780	1,835	1,379	1,583	1,786	303	1,183	1,072	1,092	916	32,721

Dundas Summary

A. Dundas Industrial Area			
Employment Area Land Supply			
Property Use	Gross Acres	Gross Hectares	
Residential < 1 acre	-	-	
Residential/Structure > 1 acre	-	-	
Utilities (Undevelopable)	-	-	
Institutional	-	-	
Office	-	-	
Retail	1	1	
Warehouse/Storage	2	1	
Light Industry	-	2	1
Medium Industry	35	14	
Heavy Industry	-	-	
Farm with Retail/Industrial Uses	-	-	
Parking Lots	-	-	
Subtotal Occupied Area	36	15	
Vacant Occupied	0	0	
Non-Developable	2	1	
Subtotal Gross Non-Developable Lands	38	15	
E-1 Schedule Removed Occupied	11	5	
Total Gross Non-Developable Lands	27	11	
Property Use			
Vacant Unoccupied	2	1	
Total Gross Developable Lands	2	1	
Total Gross Area	29	12	

C. Dundas Industrial Area	
Net Employment Area Land Supply	
Updated Land Needs Analysis	
Gross Vacant Ha	1
Gross to Net Adjustment	
CES Net Vacant Acres	n/a
CES Gross Vacant Acres	n/a
CES Gross to Net Factor	100%
Net Vacant Ha	1
Net Occupied Ha	10
Total Net Occupied & Vacant Ha	11

D. Dundas Industrial Area	
Net Employment Area Land Supply Restated to Census Day 2006	
Total Employment Area Land Absorption (net ha)	-
Net Vacant Ha, Mid-Year 2006	1
Net Occupied Ha, Mid-Year 2006	10
Total Supply, Net Ha, Mid-Year 2006	11

E. Dundas Industrial Area				
Density Estimate				
Net Occupied	Net Vacant	Total	Employment	Density
10	1	11	530	52

B. Dundas Industrial Area														
2006 Total Employment by NAICS & Census Tract														
North American Industry Classification System														
Census Tract	Percent of Total Employment Within IA	Primary	Construction & Utilities	Manufacturing	Wholesale Trade	Retail Trade	Transportation & Warehousing	Business & Related	FIRE	Education / Health / Social	Culture / Rec / Acc / Food	Other	Public Administration	Total
133.00	18%	-	110	199	53	41	-	61	38	-	-	27	-	530
Total Employment	100%	-	110	199	53	41	-	61	38	-	-	27	-	530

East Hamilton Summary

A. East Hamilton Industrial Area			
Employment Area Land Supply			
Property Use	Gross Acres	Gross Hectares	
Residential < 1 acre	1	0	
Residential/Structure > 1 acre	-	-	
Utilities (Undevelopable)	67	27	
Institutional	14	6	
Office	0	0	
Retail	41	17	
Warehouse/Storage	55	22	
Light Industry	41	17	
Medium Industry	162	66	
Heavy Industry	54	22	
Farm with Retail/Industrial Uses	-	-	
Parking Lots	0	0	
Subtotal Occupied Area	436	177	
Vacant Occupied	3	1	
Non-Developable	25	10	
Subtotal Gross Non-Developable Lands	463	188	
E-1 Schedule Removed Occupied	26	11	
Total Gross Non-Developable Lands	437	177	
Property Use			
Vacant Unoccupied	37	15	
Total Gross Developable Lands	14	6	
Total Gross Area	451	183	

C. East Hamilton Industrial Area	
Net Employment Area Land Supply	
Updated Land Needs Analysis	
Gross Vacant Ha	6
Gross to Net Adjustment	
CES Net Vacant Acres	n/a
CES Gross Vacant Acres	n/a
CES Gross to Net Factor	100%
Net Vacant Ha	6
Net Occupied Ha	167
Total Net Occupied & Vacant Ha	173

D. East Hamilton Industrial Area	
Net Employment Area Land Supply Restated to Census Day 2006	
Total Employment Area Land Absorption (net ha)	-
Net Vacant Ha, Mid-Year 2006	6
Net Occupied Ha, Mid-Year 2006	167
Total Supply, Net Ha, Mid-Year 2006	173

E. East Hamilton Industrial Area				
Density Estimate				
Net Occupied	Net Vacant	Total	Employment	Density
167	6	173	8,333	50

B. East Hamilton Industrial Area														
2006 Total Employment by NAICS & Census Tract														
North American Industry Classification System														
Census Tract	Percent of Total Employment Within IA	Primary	Construction & Utilities	Manufacturing	Wholesale Trade	Retail Trade	Transportation & Warehousing	Business & Related	FIRE	Education / Health / Social	Culture / Rec / Acc / Food	Other	Public Administration	Total
72.01	100%	16	921	2,538	1,046	742	747	565	149	507	496	450	157	8,333
Total Employment	100%	16	921	2,538	1,046	742	747	565	149	507	496	450	157	8,333

Hester Summary

A. Hester Industrial Area		
Employment Area Land Supply		
Property Use	Gross Acres	Gross Hectares
Residential < 1 acre	-	-
Residential/Structure > 1 acre	-	-
Utilities (Undevelopable)	-	-
Institutional	1	0
Office	-	-
Retail	1	0
Warehouse/Storage	3	1
Light Industry	-	-
Medium Industry	14	6
Heavy Industry	-	-
Farm with Retail/Industrial Uses	-	-
Parking Lots	-	-
Subtotal Occupied Area	19	8
Vacant Occupied	-	-
Non-Developable	-	-
Subtotal Gross Non-Developable Lands	19	8
E-1 Schedule Removed Occupied	-	-
Total Gross Non-Developable Lands	19	8
Property Use		
Vacant Unoccupied	1	0
Total Gross Developable Lands	1	0
Total Gross Area	20	8

C. Hester Industrial Area	
Net Employment Area Land Supply	
Updated Land Needs Analysis	
Gross Vacant Ha	0
Gross to Net Adjustment	
CES Net Vacant Acres	n/a
CES Gross Vacant Acres	n/a
CES Gross to Net Factor	100%
Net Vacant Ha	0
Net Occupied Ha	8
Total Net Occupied & Vacant Ha	8

E. Hester Industrial Area				
Density Estimate				
Net Occupied	Net Vacant	Total	Employment	Density
8	0	8	394	52

D. Hester Industrial Area	
Net Employment Area Land Supply Restated to Census Day 2006	
Total Employment Area Land Absorption (net ha)	-
Net Vacant Ha, Mid-Year 2006	0
Net Occupied Ha, Mid-Year 2006	8
Total Supply, Net Ha, Mid-Year 2006	8

B. Hester Industrial Area														
2006 Total Employment by NAICS & Census Tract														
Census Tract	Percent of Total Employment Within IA	North American Industry Classification System											Total	
		Primary	Construction & Utilities	Manufacturing	Wholesale Trade	Retail Trade	Transportation & Warehousing	Business & Related	FIRE	Education / Health / Social	Culture / Rec / Acc / Food	Other		Public Administration
4.01	37%	-	21	31	-	56	13	-	-	172	18	82	-	394
Total Employment	100%	-	21	31	-	56	13	-	-	172	18	82	-	394

Rifle Range Summary

A. Rifle Range Industrial Area		
Employment Area Land Supply		
Property Use	Gross Acres	Gross Hectares
Residential < 1 acre	-	-
Residential/Structure > 1 acre	-	-
Utilities (Undevelopable)	-	-
Institutional	0	0
Office	-	-
Retail	0	0
Warehouse/Storage	2	1
Light Industry	-	-
Medium Industry	6	2
Heavy Industry	-	-
Farm with Retail/Industrial Uses	-	-
Parking Lots	-	-
Subtotal Occupied Area	9	3
Vacant Occupied	-	-
Non-Developable	-	-
Subtotal Gross Non-Developable Lands	9	3
E-1 Schedule Removed Occupied	-	-
Total Gross Non-Developable Lands	9	3
Property Use		
Vacant Unoccupied	-	-
Total Gross Developable Lands	-	-
Total Gross Area	9	3

C. Rifle Range Industrial Area	
Net Employment Area Land Supply	
Updated Land Needs Analysis	
Gross Vacant Ha	-
Gross to Net Adjustment	
CES Net Vacant Acres	n/a
CES Gross Vacant Acres	n/a
CES Gross to Net Factor	100%
Net Vacant Ha	-
Net Occupied Ha	3
Total Net Occupied & Vacant Ha	3

E. Rifle Range Industrial Area				
Density Estimate				
Net Occupied	Net Vacant	Total	Employment	Density
3	-	3	620	179

D. Rifle Range Industrial Area	
Net Employment Area Land Supply Restated to Census Day 2006	
Total Employment Area Land Absorption (net ha)	-
Net Vacant Ha, Mid-Year 2006	-
Net Occupied Ha, Mid-Year 2006	3
Total Supply, Net Ha, Mid-Year 2006	3

B. Rifle Range Industrial Area														
2006 Total Employment by NAICS & Census Tract														
North American Industry Classification System														
Census Tract	Percent of Total Employment Within IA	Primary	Construction & Utilities	Manufacturing	Wholesale Trade	Retail Trade	Transportation & Warehousing	Business & Related	FIRE	Education / Health / Social	Culture / Rec / Acc / Food	Other	Public Administration	Total
43.00	33%	-	31	435	16	66	-	-	-	-	27	45	-	620
Total Employment	100%	-	31	435	16	66	-	-	-	-	27	45	-	620

WHID Summary

A. WHID Industrial Area		
Employment Area Land Supply		
Property Use	Gross Acres	Gross Hectares
Residential < 1 acre	-	-
Residential/Structure > 1 acre	-	-
Utilities (Undevelopable)	-	-
Institutional	17	7
Office	3	1
Retail	3	1
Warehouse/Storage	5	2
Light Industry	48	19
Medium Industry	32	13
Heavy Industry	10	4
Farm with Retail/Industrial Uses	-	-
Parking Lots	-	-
Subtotal Occupied Area	117	47
Vacant Occupied	-	-
Non-Developable	-	-
Subtotal Gross Non-Developable Lands	117	47
E-1 Schedule Removed Occupied	-	1
Total Gross Non-Developable Lands	118	48
Property Use		
Vacant Unoccupied	-	-
Total Gross Developable Lands	0	0
Total Gross Area	119	48

C. WHID Industrial Area	
Net Employment Area Land Supply	
Updated Land Needs Analysis	
Gross Vacant Ha	0
Gross to Net Adjustment	
CES Net Vacant Acres	n/a
CES Gross Vacant Acres	n/a
CES Gross to Net Factor	100%
Net Vacant Ha	0
Net Occupied Ha	48
Total Net Occupied & Vacant Ha	48

D. WHID Industrial Area	
Net Employment Area Land Supply Restated to Census Day 2006	
Total Employment Area Land Absorption (net ha)	0
Net Vacant Ha, Mid-Year 2006	1
Net Occupied Ha, Mid-Year 2006	47
Total Supply, Net Ha, Mid-Year 2006	48

E. WHID Industrial Area				
Density Estimate				
Net Occupied	Net Vacant	Total	Employment	Density
47	1	48	1,564	33

B. WHID Industrial Area														
2006 Total Employment by NAICS & Census Tract														
North American Industry Classification System														
Census Tract	Percent of Total Employment Within IA	Construction & Manufacturing												Total
		Primary	Utilities	Manufacturing	Wholesale Trade	Retail Trade	Transportation & Warehousing	Business & Related	FIRE	Education / Health / Social	Culture / Rec / Acc / Food	Other	Public Administration	
42.00	70%	-	167	212	37	24	249	719	-	156	-	-	-	1,564
Total Employment	100%	-	167	212	37	24	249	719	-	156	-	-	-	1,564

Airport Summary

A. Airport Business Park			
Employment Area Land Supply			
Property Use	Gross Acres	Gross Hectares	
Residential < 1 acre	31	13	
Residential/Structure > 1 acre	-	-	
Utilities (Undevelopable)	36	14	
Institutional	-	-	
Office	-	-	
Retail	3	1	
Warehouse/Storage	-	-	
Light Industry	2	1	
Medium Industry	-	-	
Heavy Industry	-	-	
Farm with Retail/Industrial Uses	31	13	
Parking Lots	-	-	
Subtotal Occupied Area	103	42	
Vacant Occupied	-	-	
Non-Developable	40	16	
Subtotal Gross Non-Developable Lands	143	58	
E-1 Schedule Removed Occupied	85	34	
Total Gross Non-Developable Lands	58	23	
Property Use			
Vacant Unoccupied	-	-	
Total Gross Developable Lands	275	111	
Total Gross Area	333	135	

C. Airport Business Park	
Net Employment Area Land Supply	
Updated Land Needs Analysis	
Gross Vacant Ha	111
Gross to Net Adjustment	
CES Net Vacant Acres	439
CES Gross Vacant Acres	524
CES Gross to Net Factor	84%
Net Vacant Ha	93
Net Occupied Ha	7
Total Net Occupied & Vacant Ha	101

D. Airport Business Park	
Net Employment Area Land Supply Restated to Census Day 2006	
Total Employment Area Land Absorption (net ha)	-
Net Vacant Ha, Mid-Year 2006	93
Net Occupied Ha, Mid-Year 2006	7
Total Supply, Net Ha, Mid-Year 2006	101

E. Airport & North Glanbrook Business Parks*				
Density Estimate				
Net Occupied	Net Vacant	Total	Employment	Density
156	229	385	2,448	16

B. Airport & North Glanbrook Business Parks*														
2006 Total Employment by NAICS & Census Tract														
North American Industry Classification System														
Census Tract	Percent of Total Employment Within BP	Construction & Manufacturing											Total	
		Primary	Utilities	Manufacturing	Wholesale Trade	Retail Trade	Transportation & Warehousing	Business & Related	FIRE	Education / Health / Social	Culture / Rec / Acc / Food	Other		Public Administration
101.00	60%	-	97	70	59	-	2,081	66	-	-	-	27	48	2,448
Total Employment	100%	-	97	70	59	-	2,081	66	-	-	-	27	48	2,448

*Note: The North Glanbrook and Airport Business Parks are combined because they are both located in the same Rural Census Tract (101.00) and therefore provide the Employment estimate used to determine the density.

Ancaster Summary

A. Ancaster Business Park		
Employment Area Land Supply		
Property Use	Gross Acres	Gross Hectares
Residential < 1 acre	-	-
Residential/Structure > 1 acre	-	-
Utilities (Undevelopable)	31	13
Institutional	5	2
Office	-	-
Retail	19	8
Warehouse/Storage	27	11
Light Industry	32	13
Medium Industry	125	51
Heavy Industry	-	-
Farm with Retail/Industrial Uses	-	-
Parking Lots	-	-
Subtotal Occupied Area	239	97
Vacant Occupied	-	-
Non-Developable	12	5
Subtotal Gross Non-Developable Lands	251	101
E-1 Schedule Removed Occupied	17	7
Total Gross Non-Developable Lands	234	95
Property Use		
Vacant Unoccupied	-	-
Total Gross Developable Lands	297	120
Total Gross Area	531	215

C. Ancaster Business Park	
Net Employment Area Land Supply	
Updated Land Needs Analysis	
Gross Vacant Ha	120
Gross to Net Adjustment	
CES Net Vacant Acres	347
CES Gross Vacant Acres	400
CES Gross to Net Factor	87%
Net Vacant Ha	104
Net Occupied Ha	90
Total Net Occupied & Vacant Ha	194

E. Ancaster Business Park				
Density Estimate				
Net Occupied	Net Vacant	Total	Employment	Density
51	143	194	2,032	40

D. Ancaster Business Park	
Net Employment Area Land Supply Restated to Census Day 2006	
Total Employment Area Land Absorption (net ha)	39
Net Vacant Ha, Mid-Year 2006	143
Net Occupied Ha, Mid-Year 2006	51
Total Supply, Net Ha, Mid-Year 2006	194

B. Ancaster Business Park															
2006 Total Employment by NAICS & Census Tract															
North American Industry Classification System															
Census Tract	Percent of Total Employment Within BP	Primary	Construction & Utilities	Manufacturing	Wholesale Trade	Retail Trade	Transportation & Warehousing	Business & Related	FIRE	Education / Health / Social	Culture / Rec / Acc / Food	Other	Public Administration	Total	
120.02	41%	-	131	312	219	35	182	230	-	56	219	82	-	1,466	
121.00	57%	-	21	21	-	334	19	-	-	-	127	44	-	566	
Total Employment	100%	-	152	333	219	370	201	230	-	56	346	126	-	2,032	

Flamborough Summary

A. Flamborough Business Park		
Employment Area Land Supply		
Property Use	Gross Acres	Gross Hectares
Residential < 1 acre	4	2
Residential/Structure > 1 acre	-	-
Utilities (Undevelopable)	0	0
Institutional	21	9
Office	6	3
Retail	13	5
Warehouse/Storage	3	1
Light Industry	27	11
Medium Industry	79	32
Heavy Industry	5	2
Farm with Retail/Industrial Uses	-	-
Parking Lots	-	-
Subtotal Occupied Area	159	64
Vacant Occupied	-	-
Non-Developable	67	27
Subtotal Gross Non-Developable Lands	226	91
E-1 Schedule Removed Occupied	82	33
Total Gross Non-Developable Lands	144	58
Property Use		
Vacant Unoccupied	-	-
Total Gross Developable Lands	195	79
Total Gross Area	338	137

C. Flamborough Business Park	
Net Employment Area Land Supply	
Updated Land Needs Analysis	
Gross Vacant Ha	79
Gross to Net Adjustment	
CES Net Vacant Acres	281
CES Gross Vacant Acres	310
CES Gross to Net Factor	91%
Net Vacant Ha	71
Net Occupied Ha	31
Total Net Occupied & Vacant Ha	103

E. Flamborough Business Park				
Density Estimate				
Net Occupied	Net Vacant	Total	Employment	Density
29	74	103	1,073	37

D. Flamborough Business Park	
Net Employment Area Land Supply Restated to Census Day 2006	
Total Employment Area Land Absorption (net ha)	2
Net Vacant Ha, Mid-Year 2006	74
Net Occupied Ha, Mid-Year 2006	29
Total Supply, Net Ha, Mid-Year 2006	103

B. Flamborough Business Park															
2006 Total Employment by NAICS & Census Tract															
North American Industry Classification System															
Census Tract	Percent of Total Employment Within BP	Culture /													Total
		Primary	Construction & Utilities	Manufacturing	Wholesale Trade	Retail Trade	Transportation & Warehousing	Business & Related	FIRE	Education / Health / Social	Rec / Acc / Food	Other	Public Administration		
140.03	13%	-	10	10	27	43	13	-	-	-	-	-	25	10	139
140.04	39%	-	63	93	80	86	-	-	-	-	-	82	95	-	499
141.00	16%	-	81	153	49	20	80	-	-	-	-	-	52	-	436
Total Employment	100%	-	154	256	156	150	93	-	-	-	82	172	10	1,073	

Mountain Summary

A. Mountain Business Park			
Employment Area Land Supply			
Property Use	Gross Acres	Gross Hectares	
Residential < 1 acre	4	1	
Residential/Structure > 1 acre	-	-	
Utilities (Undevelopable)	61	25	
Institutional	17	7	
Office	23	9	
Retail	32	13	
Warehouse/Storage	31	13	
Light Industry	66	27	
Medium Industry	156	63	
Heavy Industry	-	-	
Farm with Retail/Industrial Uses	-	-	
Parking Lots	-	-	
Subtotal Occupied Area	390	158	
Vacant Occupied	-	-	
Non-Developable	56	23	
Subtotal Gross Non-Developable Lands	446	181	
E-1 Schedule Removed Occupied	26	11	
Total Gross Non-Developable Lands	420	170	
Property Use			
Vacant Unoccupied	-	-	
Total Gross Developable Lands	211	85	
Total Gross Area	631	255	

C. Mountain Business Park	
Net Employment Area Land Supply	
Updated Land Needs Analysis	
Gross Vacant Ha	85
Gross to Net Adjustment	
CES Net Vacant Acres	427
CES Gross Vacant Acres	444
CES Gross to Net Factor	96%
Net Vacant Ha	82
Net Occupied Ha	147
Total Net Occupied & Vacant Ha	229

D. Mountain Business Park	
Net Employment Area Land Supply Restated to Census Day 2006	
Total Employment Area Land Absorption (net ha)	1
Net Vacant Ha, Mid-Year 2006	84
Net Occupied Ha, Mid-Year 2006	146
Total Supply, Net Ha, Mid-Year 2006	229

E. Mountain Business Park				
Density Estimate				
Net Occupied	Net Vacant	Total Employment Land	Employment	Density
146	84	229	5,654	39

B. Mountain Business Park															
2006 Total Employment by NAICS & Census Tract															
Census Tract	Percent of Total Employment Within BP	North American Industry Classification System													Total
		Primary	Construction & Utilities		Manufacturing	Wholesale Trade	Retail Trade	Transportation & Warehousing	Business & Related	FIRE	Education / Health / Social	Culture / Rec / Acc / Food		Public Administration	
			Primary	Utilities								Other	Food		
1.01	100%	16	1,534	849	523	710	51	475	162	148	518	395	272	5,654	
Total Employment	100%	16	1,534	849	523	710	51	475	162	148	518	395	272	5,654	

North Glanbrook Summary

A. North Glanbrook Business Park			
Employment Area Land Supply			
Property Use	Gross Acres	Gross Hectares	
Residential < 1 acre	13	5	
Residential/Structure > 1 acre	-	-	
Utilities (Undevelopable)	159	64	
Institutional	3	1	
Office	-	-	
Retail	8	3	
Warehouse/Storage	2	1	
Light Industry	-	-	
Medium Industry	10	4	
Heavy Industry	86	35	
Farm with Retail/Industrial Uses	89	36	
Parking Lots	-	-	
Subtotal Occupied Area	369	149	
Vacant Occupied	-	-	
Non-Developable	20	8	
Subtotal Gross Non-Developable Lands	389	157	
E-1 Schedule Removed Occupied	1	1	
Total Gross Non-Developable Lands	388	157	
Property Use			
Vacant Unoccupied	-	-	
Total Gross Developable Lands	406	164	
Total Gross Area	794	321	

C. North Glanbrook Business Park	
Net Employment Area Land Supply	
Updated Land Needs Analysis	
Gross Vacant Ha	164
Gross to Net Adjustment	
CES Net Vacant Acres	561
CES Gross Vacant Acres	678
CES Gross to Net Factor	83%
Net Vacant Ha	136
Net Occupied Ha	149
Total Net Occupied & Vacant Ha	285

D. North Glanbrook Business Park	
Net Employment Area Land Supply Restated to Census Day 2006	
Total Employment Area Land Absorption (net ha)	2
Net Vacant Ha, Mid-Year 2006	138
Net Occupied Ha, Mid-Year 2006	147
Total Supply, Net Ha, Mid-Year 2006	285

E. Airport & North Glanbrook Business Parks*				
Density Estimate				
Net Occupied	Net Vacant	Total	Employment	Density
154	231	385	2,448	16

B. Airport & North Glanbrook Business Parks*														
2006 Total Employment by NAICS & Census Tract														
North American Industry Classification System														
Census Tract	Percent of Total Employment Within BP	Construction & Manufacturing											Total	
		Primary	Utilities	Manufacturing	Wholesale Trade	Retail Trade	Transportation & Warehousing	Business & Related	FIRE	Education / Health / Social	Culture / Rec / Acc / Food	Other		Public Administration
101.00	60%	-	97	70	59	-	2,081	66	-	-	-	27	48	2,448
Total Employment	100%	-	97	70	59	-	2,081	66	-	-	-	27	48	2,448

*Note: The North Glanbrook and Airport Business Parks are combined because they are both located in the same Rural Census Tract (101.00) and therefore provide the Employment estimate used to determine the density.

Stoney Creek Summary

A. Stoney Creek Business Park			
Employment Area Land Supply			
Property Use	Gross Acres	Gross Hectares	
Residential < 1 acre	65	26	
Residential/Structure > 1 acre	-	-	
Utilities (Undevelopable)	90	36	
Institutional	45	18	
Office	9	4	
Retail	81	33	
Warehouse/Storage	71	29	
Light Industry	148	60	
Medium Industry	657	266	
Heavy Industry	141	57	
Farm with Retail/Industrial Uses	-	-	
Parking Lots	-	-	
Subtotal Occupied Area	1,307	529	
Vacant Occupied	-	-	
Non-Developable	62	25	
Subtotal Gross Non-Developable Lands	1,368	554	
E-1 Schedule Removed Occupied	3	1	
Total Gross Non-Developable Lands	1,366	553	
Property Use			
Vacant Unoccupied	-	-	
Total Gross Developable Lands	348	141	
Total Gross Area	1,713	693	

C. Stoney Creek Business Park	
Net Employment Area Land Supply	
Updated Land Needs Analysis	
Gross Vacant Ha	141
Gross to Net Adjustment	
CES Net Vacant Acres	252
CES Gross Vacant Acres	266
CES Gross to Net Factor	95%
Net Vacant Ha	133
Net Occupied Ha	528
Total Net Occupied & Vacant Ha	661

E. Stoney Creek Business Park				
Density Estimate				
Net Occupied	Net Vacant	Total	Employment	Density
492	169	661	14,298	29

D. Stoney Creek Business Park	
Net Employment Area Land Supply Restated to Census Day 2006	
Total Employment Area Land Absorption (net ha)	36
Net Vacant Ha, Mid-Year 2006	169
Net Occupied Ha, Mid-Year 2006	492
Total Supply, Net Ha, Mid-Year 2006	661

B. Stoney Creek Business Park														
2006 Total Employment by NAICS & Census Tract														
North American Industry Classification System														
Census Tract	Percent of Total Employment Within BP	North American Industry Classification System												Total
		Primary	Construction & Utilities	Manufacturing	Wholesale Trade	Retail Trade	Transportation & Warehousing	Business & Related	FIRE	Education / Health / Social	Culture / Rec / Acc / Food	Other	Public Administration	
84.04	100%	-	691	1,947	630	214	990	232	48	217	16	258	26	5,268
85.03	96%	-	941	2,538	1,291	129	479	344	166	84	95	187	79	6,333
86.00	93%	-	398	917	235	204	128	365	105	42	207	66	31	2,697
Total Employment	100%	-	2,031	5,402	2,156	547	1,596	941	319	343	317	510	136	14,298

Airport & North Glanbrook Summary

A. Airport & North Glanbrook Business Parks			
Employment Area Land Supply			
Property Use	Gross Acres	Gross Hectares	
Residential < 1 acre	44	18	
Residential/Structure > 1 acre	-	-	
Utilities (Undevelopable)	194	79	
Institutional	3	1	
Office	-	-	
Retail	11	4	
Warehouse/Storage	2	1	
Light Industry	2	1	
Medium Industry	10	4	
Heavy Industry	86	35	
Farm with Retail/Industrial Uses	120	49	
Parking Lots	-	-	
Subtotal Occupied Area	472	191	
Vacant Occupied	-	-	
Non-Developable	60	24	
Subtotal Gross Non-Developable Lands	532	215	
E-1 Schedule Removed Occupied	86	35	
Total Gross Non-Developable Lands	446	180	
Property Use			
Vacant Unoccupied	-	-	
Total Gross Developable Lands	681	276	
Total Gross Area	1,127	456	

C. Airport & North Glanbrook Business Parks	
Net Employment Area Land Supply	
Updated Land Needs Analysis	
Gross Vacant Ha	276
Gross to Net Adjustment	
CES Net Vacant Acres	1,000
CES Gross Vacant Acres	1,202
CES Gross to Net Factor	83%
Net Vacant Ha	229
Net Occupied Ha	156
Total Net Occupied & Vacant Ha	386

D. Airport & North Glanbrook Business Parks	
Net Employment Area Land Supply Restated to Census Day 2006	
Total Employment Area Land Absorption (net ha)	2
Net Vacant Ha, Mid-Year 2006	231
Net Occupied Ha, Mid-Year 2006	154
Total Supply, Net Ha, Mid-Year 2006	386

E. Airport & North Glanbrook Business Parks*				
Density Estimate				
Net Occupied	Net Vacant	Total	Employment	Density
154	231	386	2,448	16

B. Airport & North Glanbrook Business Parks*															
2006 Total Employment by NAICS & Census Tract															
North American Industry Classification System															
Census Tract	Percent of Total Employment Within BP	Construction & Manufacturing											Public Administration		Total
		Primary	Utilities	Manufacturing	Wholesale Trade	Retail Trade	Transportation & Warehousing	Business & Related	FIRE	Education / Health / Social	Culture / Rec / Acc / Food	Other			
101.00	74%	-	97	70	59	-	2,081	66	-	-	-	27	48	2,448	
Total Employment	100%	-	97	70	59	-	2,081	66	-	-	-	27	48	2,448	

*Note: The North Glanbrook and Airport Business Parks are combined because they are both located in the same Rural Census Tract (101.00) and therefore provide the Employment estimate used to determine the density.