
Subject: Niagara Region's Employment Area Strategy: Background Report and Recommendations

Report to: Planning and Economic Development Committee

Report date: Wednesday, May 13, 2020

Recommendations

1. That Report PDS 14-2020 **BE ENDORSED**; and
2. That Report PDS 14-2020 **BE CIRCULATED** to the local municipal Planning Directors and Ministry of Municipal Affairs and Housing.

Key Facts

- The purpose of this report is to inform Council of the completion of the *Niagara Employment Area Strategy: Background Report and Recommendations* (the "Strategy") and the employment-related work plan for the new Niagara Official Plan.
- The purpose of the Strategy was to identify, map, and comprehensively understand Niagara's existing traditional employment clusters.
- Regional staff conducted extensive engagement with local area municipal planning staff and industry stakeholders from Niagara and the broader Greater Toronto Hamilton Area to develop the Strategy.
- The Strategy mapped 31 employment areas across Niagara that will be implemented as a schedule into the existing Regional Official Plan ("ROP") through Regional Official Plan Amendment 16 ("ROPA 16"), to be advance at a later time.
- The next step is the preparation of an Official Plan Employment Policy Paper (the "OP Paper"), which will build on the Strategy's recommendations. The OP Paper will set out the items to be incorporated in the new Niagara Official Plan.

Financial Considerations

The costs associated with the Strategy are accommodated within the Council approved project budget for the new Niagara Official Plan.

Analysis

This report is split into five sections to set out the relationship between the Strategy and the Region's broader employment-related work plan. The sections are as follows:

1. Provincial Policy Direction and Context
2. Niagara Region's Employment Area Strategy
3. Official Plan Employment Policy Paper
4. Regional Official Plan Amendment 16
5. New Niagara Official Plan

1. Provincial Policy Direction and Context

Recent changes to Provincial policy, including *A Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2019* (the "*Growth Plan*") and the *Provincial Policy Statement, 2020* (the "*PPS*") have modernized employment planning in Ontario.

1.1 Planning for Employment

The *Growth Plan* requires the Region to plan a forecasted employment growth of 265,000 jobs by the year 2041.

These jobs are allocated across the lower-tier municipalities in Niagara through the Province's Land Needs Assessment Methodology (the "LNA"), a complex calculation that allocates the forecasted employment growth. The LNA sets out the forecasted employment growth in four categories:

- major office employment;
- employment land employment;
- population-related employment; and
- rural land employment.

The identification of "employment areas" is critical in employment planning. These are defined in the *Growth Plan* and *PPS* 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.

The *Growth Plan* also directs upper- and single-tier municipalities, including Niagara Region, to identify and plan for employment areas separate from other job-producing areas, such as employment lands and mixed use areas. Therefore, the Region's work, and the subject of this Report, is primarily focused on employment areas over other lands that provide jobs.

The purpose of an employment area designation is to protect the long-term viability of on-site employment uses, allowing them to operate, grow, and expand without restriction from encroaching non-employment land uses.

Employment areas are also used to calculate land supply for major office employment and employment land employment, noted above. This is used to strategically plan for job growth within these categories.

1.2 New Rules on Employment Conversion

There are specific rules to change from an employment use to any other uses. The rules differ depending on the Regional and local designation of the lands.

Under the previous *Growth Plan (2017)*, employment uses could only be considered for conversion at the time of a municipal comprehensive review ("MCR"). The new *Growth Plan (2019)* now permits employment conversions prior to a MCR. In the Region's case, the new Regional Official Plan (ROP) is the "MCR".

The exception to this permission however is for lands located in a provincially significant employment zone ("PSEZ"). Lands in a PSEZ can only be converted at the time of the Region's next MCR.

The concept of a PSEZ was introduced in the new *Growth Plan (2019)*. PSEZs are:

areas defined by the Minister in consultation with affected municipalities for the purpose of long-term planning for job creation and economic development. Provincially significant employment zones can consist of employment areas as well as mixed-use areas that contain a significant number of jobs.

There are currently no PSEZs identified in Niagara Region. PSEZs were, for the most part, mapped based on existing employment areas identified in upper- and single-tier official plans. Since the current ROP does not have employment areas mapped - no PSEZs were identified.

Detailed employment conversion policies are provided in the draft ROP Amendment 16 ("ROPA 16"). Amongst other things, ROPA 16 incorporates the new employment conversion processes in the existing ROP.

ROPA 16 is discussed in more detail in section 4 of this report.

2. Niagara Region's Employment Area Strategy

2.1 Purpose

The existing ROP does not clearly recognize Niagara's employment areas.

In December 2018, the Region retained MHBC Planning to prepare the Employment Area Strategy.

The purpose of the Strategy was to identify, map, and comprehensively understand Niagara's existing clusters of businesses and economic activities relating to traditional employment uses, including but not limited to industrial, manufacturing, transportation / warehousing logistics, and major office.

The Final Strategy is attached as Appendix 1.

Amongst other things, the Region worked with MHBC to identify the location of employment areas based on existing, and often historical, land use designations from local official plans and zoning by-laws.

Employment areas identified through this Strategy are proposed to be introduced as a schedule to the existing ROP through ROPA 16, and will be further examined through the Region's Official Plan Employment Policy Paper ("OP Paper") for implementation into the new Niagara Official Plan.

2.2 Relationship between Employment Lands and Employment Areas

Employment lands are parcels designated for employment uses within a *local* municipal official plan and/or zoning by-law. The Region has a limited policy framework relating to employment lands since they have historically been primarily a local matter.

Employment *areas* are made up of employment *lands*, but not all employment *lands* are in employment *areas*.

Employment lands located outside of employment areas typically have or are designated for employment uses that can be more easily integrated with other land uses.

2.3 Relationship to the Region's Past and Current Employment Initiatives

The Strategy was informed by the Region's previously completed employment-related studies and strategies, including its MCR work.

A visual of the timeline for these initiatives is provided in Figure 1.

Figure 1: A timeline of the Region's past and current employment-related work plan.

2011 - 2014	2015 - 2016	2017 - 2018	2019 - 2020	2021
<ul style="list-style-type: none"> ✓ Phase I: Gateway Employment Lands Study. ✓ Phase II: Non-Gateway Employment Lands Study. 	<ul style="list-style-type: none"> ✓ MCR Phase 1 & 2: Employment Background Trends & Analysis. ✓ MCR Phase 3: Preferred Growth Option. ✓ Employment land identification. 	<ul style="list-style-type: none"> ✓ Initiation of the Employment Area Strategy. ✓ Engagement with Area Planners. ✓ Employment area mapping & analysis. 	<ul style="list-style-type: none"> ➤ Engagement with Area Planners & industry stakeholders. ➤ Endorsement of the Employment Area Strategy. ➤ Adoption of ROPA 16. ➤ Endorsement of the Official Plan Employment Policy Paper. <p>WE ARE HERE.</p>	<ul style="list-style-type: none"> ➤ Completion of the new Niagara Official Plan.

2.4 Stakeholder Engagement

Regional staff have conducted extensive engagement with local area municipalities and industry stakeholders, including:

- individual meetings with each local municipality to identify employment lands that should be included within employment areas;

- hosting two stakeholder group workshops, one with industry and one with local municipal planners, to review draft employment area policy direction and mapping;
- hosting four public information centres (“PICs”) as part of the new Niagara Official Plan to solicit public input on employment areas, amongst other things; and
- hosting an industry stakeholder update and question and answer session to discuss the draft recommendations of the Strategy and its next steps for implementation.

This engagement directly shaped the Strategy’s mapping and recommendations.

Additional consultation details are provided in the section below.

2.4.1 Engagement with Local Municipalities

In the summers of 2018 and 2019, Regional staff met, individually, with planning staff at each local municipality to discuss locations and characteristics of existing traditional employment clusters that would meet the definition of an employment area.

Employment lands were identified based on existing uses and planned land use designations within official plans and zoning by-laws. Employment areas were then identified based on employment lands that were clustered together.

Engagement with local municipalities lead to the delineation of the 31 employment areas identified in the Strategy.

2.4.2 Stakeholder Workshops

In October 2019, the Region hosted two workshops lead by MHBC – one for local municipal area planners and one for industry stakeholders and economic development offices.

Similar materials were presented during each workshop, including draft employment area mapping, a high-level assessment of Niagara’s employment area characteristics, and discussion questions to gather feedback in developing policy direction and recommendations.

2.4.3 Public Information Centres for the New Niagara Official Plan

In November 2019, Regional staff presented draft elements of the Strategy during PICs for the new Niagara Official Plan.

Regional staff attended four PICs, one in each of the Town of Fort Erie, Town of Grimsby, City of Niagara Falls, and City of Thorold.

Materials shown during PICs included display panels that illustrated the Strategy's draft elements, including a visual of Niagara's 31 employment areas, as well as considerations used to map these areas.

2.4.4 Industry Stakeholder Update and Question & Answer Session

In February 2020, Regional staff hosted an industry stakeholder employment update and question and answer session. The purpose of the session was to provide direct communication to the industry about the Region's employment-related work plan.

Matters discussed included the progress and next steps of the Strategy, the OP Paper, ROPA 16, and the new Niagara Official Plan.

The session was well attended with approximately 40 attendees, and included a 25 minute presentation, followed by a 1 hour question and answer period.

2.4.5 Individual and Site-Specific Engagement

Regional staff received several municipal and private requests contemplating modifications to mapped employment area boundaries. These are described further in the Strategy.

As previously noted, the boundaries of employment areas were established after extensive review by Regional staff, its consultant, and detained consultation with local municipal planners.

However, the boundaries and amount of designated employment area lands may be updated soon if revised employment forecasts are provided by the Province.

The review of requests for changes to employment area boundaries is ongoing. The appropriate stage to make decisions on these requests is after receiving direction from the Province on revised forecasts and, correspondingly, after the Region has taken further steps with its LNA. Council's endorsement of the Strategy is important to ensure Regional staff have direction to move forward with employment planning in this way.

In terms of municipal requests, the City of Thorold, at its December 17, 2019 meeting, passed the following motion:

Niagara Region staff explore the appropriateness of a potential employment conversion, with respect to 5.46 acres of land located at 1686 Beaverdams Road, for future residential development through the Region's ongoing Municipal Comprehensive Review process...

Subsequently, the Region, City and the landowners have met, individually and collectively, to discuss the request. No determinations have been made as to the appropriateness of a conversion based on the information available. As noted above, this request, along with others, will be further considered as part of the Region's LNA work and new Niagara ROP policy at a later date.

Additionally, the Town of Fort Erie requested an expansion to one of its employment areas. This request is supported by the Town's locally adopted Fort Erie Industrial Land Strategy. The Region and Town have had discussions about its request; further analysis is ongoing as part of the new Niagara ROP policy work.

2.5 Best Practices Review: Understanding Employment Area Characteristics

The Strategy includes a municipal best practices review to understand the role and function of employment areas within municipal planning policy.

The review included a blend of upper- and single-tier municipalities located within the Greater Golden Horseshoe ("GGH"), as well as two that share direct cross-border infrastructure with the United States: the City of Windsor and City of Sarnia.

The review revealed that Niagara is the only upper- or single-tier municipality in the GGH that does not currently identify / map employment areas in its ROP. This deficiency needs to be corrected in order to be competitive with other jurisdictions.

The review also demonstrated that Niagara shares attributes with other GGH employment areas, including direct or close access to major goods movement infrastructure, such as airports, ports, highway interchanges, and active rail corridors.

Additional observations are set out in the Strategy.

2.6 Niagara's Employment Areas Characteristics

The Strategy includes a strengths, weaknesses, opportunities, and challenges ("SWOC") analysis of Niagara's 31 employment areas.

The SWOC analysis found that, similar to GGH municipalities, Niagara's employment areas tend to be located in close proximity to major goods movement facilities and corridors.

Niagara's access and proximity to goods movement assets is unique given its location to the Welland Canal and cross-border trade infrastructure. Niagara's employment areas offer advantageous geographic benefits for inter-regional trade and attracting a range of large-scale traditional employment uses which rely on freight movement and storage.

The SWOC analysis also found that Niagara's employment areas have specific challenges.

For example, many of Niagara's employment areas are generally comprised of small or irregular sized parcels incapable of accommodating large-scale employment uses.

Where larger vacant parcels exist, they often possess encumbrances such as contamination, absence of available connections to municipal servicing infrastructure, or fragmentation caused by natural heritage features increasing development risk.

Additional observations are set out in the Strategy.

2.7 Recommendations and Policy Direction

The Strategy offers recommendations on how employment areas should be incorporated into the new Niagara ROP. Although the Strategy does not recommend specific policy language, it provides direction on matters relating to:

- employment areas;
- employment lands;
- intensified employment uses in employment areas;
- employment-supportive uses in employment areas; and
- future employment areas and PSEZs.

The recommendations are discussed in the Strategy. They also influenced draft materials of ROPA 16 and will be explored further in the OP Paper, as discussed in sections 3 and 4 of this Report.

3. Official Plan Employment Policy Paper

The purpose of the OP Paper is to determine how all employment-related matters, including employment lands and employment areas, will be considered and implemented into the new Niagara ROP.

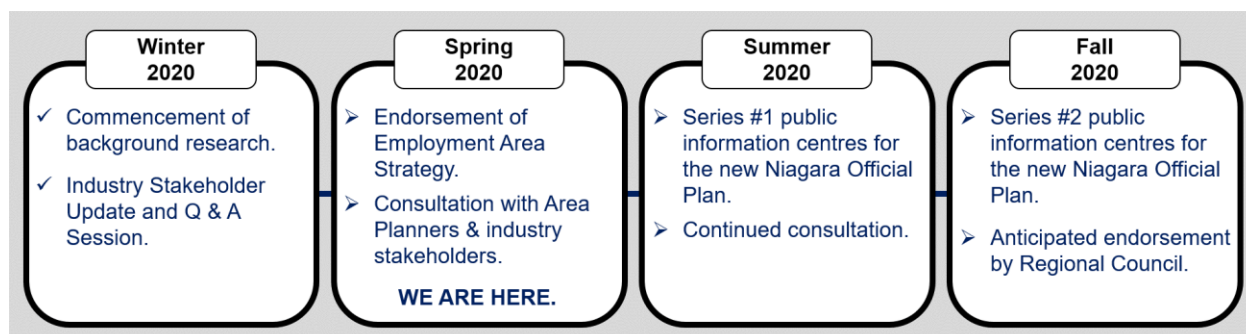
The OP Paper seeks to implement recommendations of the Strategy through incorporation into the new Niagara ROP.

Specifically, the OP Paper will:

- Determine density targets for each of Niagara's identified employment areas.
- Refine employment area boundaries based on the Region's ongoing Land Needs Assessment work and site-specific considerations.
- Establish a consistent approach to identify and implement future employment areas and PSEZs.
- Produce a standardized set of conversion criteria for municipal review.
- Offer direction on how and the extent to which the Region's employment-related incentive programs will be incorporated into policy.

A visual of the OP Paper's timeline is provided in Figure 2. This timeline may change as a result of unforeseen delays caused by the COVID-19 emergency.

Figure 2: A timeline of key milestones associated to the Official Plan Employment Policy Paper.



Regional staff are in the process of drafting the OP Paper and will provide an overview of its status and components during the new Niagara ROP Public Information Centres this summer.

4. Regional Official Plan Amendment 16

ROPA 16 will be the subject of a report planned for Planning and Economic Development Committee this summer.

The Region initiated ROPA 16 to address its existing employment policies which are inadequate and do not conform to Provincial policy.

ROPA 16 amends section 3 “Employment”, section 4 “Managing Growth”, and section 15 “Definitions” of the existing ROP to update matters relating to employment areas, PSEZs, and conversion.

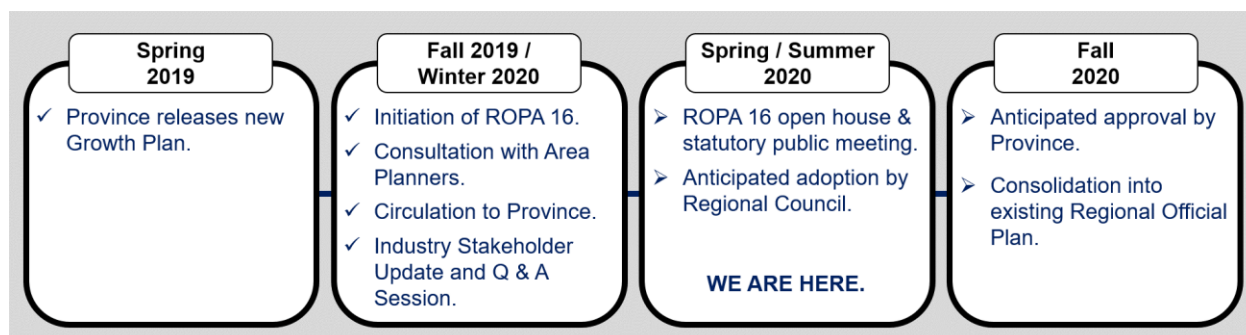
The Amendment also implements a new schedule, Schedule G3 - Employment Areas, that establishes mapping for Niagara’s 31 employment areas as identified through the Strategy.

These changes will bring the existing ROP in to conformity with the *Growth Plan*.

The draft Amendment is available online at: niagararegion.ca/ropa16.

A visual of ROPA 16 timeline is provided in Figure 3. As noted above, this timeline may change as a result of the COVID-19 emergency.

Figure 3: A timeline of key milestones associated to ROPA 16.

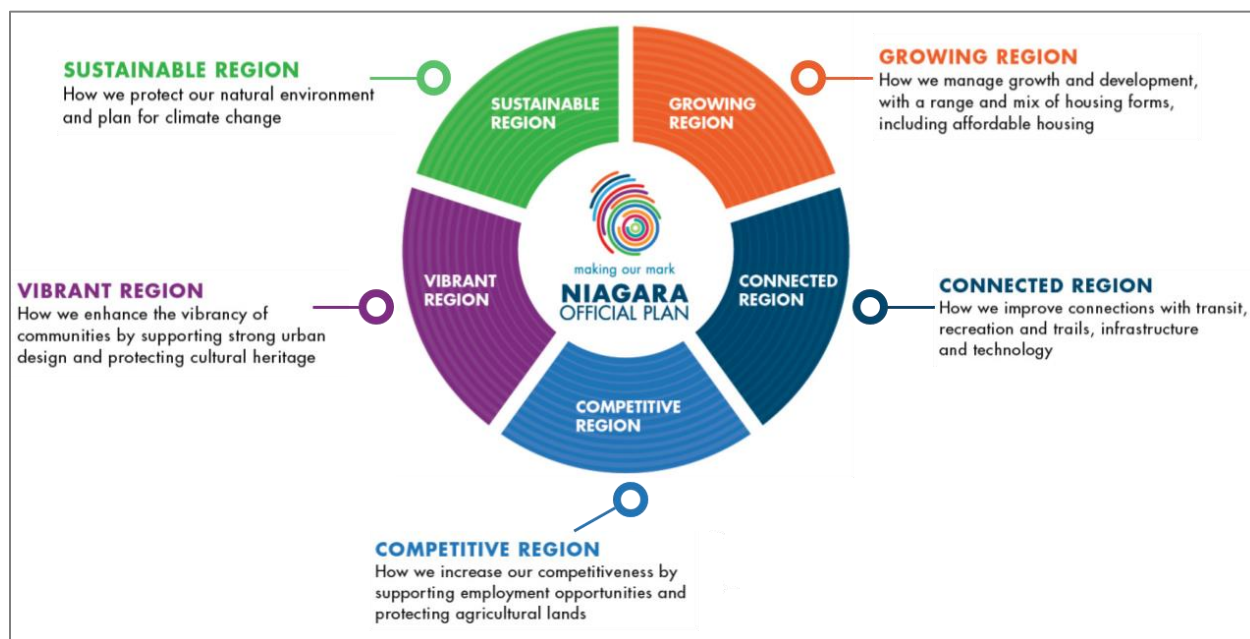


5. New Niagara Official Plan

The Region's Employment Area Strategy, OP Paper, and ROPA 16 will inform the policies of the new Niagara ROP.

A visual of the policy themes for the new Niagara ROP are shown in Figure 4.

Figure 4: Policy themes of the new Niagara Official Plan.



The Region's employment initiatives will predominantly be reflected within the "Competitive Region" policy theme, although there is a relationship to other policy themes.

Alternatives Reviewed

The *Planning Act, 1990*, requires Official Plans to conform to, be consistent with, or not be in conflict with, Provincial policy. The *Growth Plan* requires the Region to designate and protect employment areas for employment uses over the long-term.

This Strategy delineates the boundaries of Niagara's employment areas and sets up the process for ROPA 16 to proceed. Additionally, ROPA 16 will bring the existing ROP into conformity with the *Growth Plan* on matters relating to conversions and PSEZs, amongst other things.

Relationship to Council Strategic Priorities

The Strategy helps to achieve the following Strategic Priorities:

- Business and Economic Growth; and
- Responsible Growth and Infrastructure Planning.

The identification and protection of employment areas helps the Region plan for the long-term growth and supports the viability of traditional employment uses (i.e. industrial, manufacturing) and allows municipalities to make evidence-based decisions to target industrial sectors and plan for capital improvements.

Other Pertinent Reports

PDS 33-2019, Growth Management Program Update for the New Official Plan

PDS 35-2019, Employment Policies Update: Project Initiation Report

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Appendices

Appendix 1 Niagara Region's Employment Area Strategy:
Background Report and Recommendations

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NEW NIAGARA OFFICIAL PLAN

Niagara Region's Employment Area Strategy: Background Report and Recommendations

Niagara Region
March 20, 2020



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EXECUTIVE SUMMARY

Supporting employment areas, both existing and future, is critical to Niagara's economic prosperity. Since December 2018, MHBC and urbanMetrics have worked in collaboration with Niagara Region (the "Region") staff to develop an Employment Area Strategy (the "Strategy") for the Region.

How municipalities plan for employment is guided by several layers of land use planning policy. Employment areas are defined in Provincial policy and are restricted from conversion to non-employment uses unless specific criteria are demonstrated and satisfied during the Region's municipal comprehensive review (MCR) process.

Throughout the Greater Golden Horseshoe (GGH), upper- and single-tier municipalities define and map employment areas, as well as provide policy direction to protect and enhance existing and planned employment uses. With recent amendments to Provincial policies, namely the Growth Plan for the Greater Golden Horseshoe (the "Growth Plan"), the Region must revise its Regional Official Plan (ROP) employment policies to conform to new Provincial policy direction.

Through undertaking this Strategy, the Region, in consultation with its local municipalities and stakeholders, has identified 31 employment areas in Niagara. This Strategy provides a detailed inventory of the physical and socio-economic market characteristics of each employment area and compares their traits to other employment areas in the GGH.

The report findings conclude that the Region's employment areas have diverse traits and characteristics, including: size of parcels; types of existing employment uses; availability of vacant land and municipal servicing; access to major goods movement facilities and corridors; appropriate land use policy and permissions; and, economic output.

The Strategy offers employment area and future employment area policy recommendations that the Region should further consider including:

- recognizing the Region's employment areas within a ROP schedule;
- adding policies for permitted uses and employment-supportive uses within employment areas;
- consulting with the Province and local municipalities to identify appropriate employment areas and employment lands, if any, to receive a provincially significant employment zone (PSEZ) designation;
- managing requests for conversion of employment uses to non-employment uses within employment areas and employment lands;
- supporting the intensification and expansion of employment areas with the required infrastructure; and,
- consideration towards additional employment protection through identifying future employment areas.

The Strategy recommendations should be integrated into the new ROP and be further refined through consultation with local municipalities and stakeholders.

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1.0 INTRODUCTION

1.1 Background

Initiated in 2014, the Region's municipal comprehensive review (the MCR) and broader growth management program had been working towards implementing the direction of the Growth Plan.

As part of this work, the Region undertook a **Phase I Gateway Employment Lands Study** and **Phase II Non-Gateway Employment Lands Study** to identify and protect the Region's employment lands and to identify Strategic Locations for Investment.

These studies contributed background work and analysis to inform section 3 ROP employment policies, as well as employment-related discussion papers, such as the **Economic Discussion of Long-Term Regional Planning Issues in Niagara Region** (Frank A. Clayton and Tom McCormack, June 2016).

1.2 The Employment Area Strategy

In December 2018, the Region in partnership with consultants MHBC and urbanMetrics commenced the Strategy to consolidate, update, and expand upon previous **Phase I Gateway Employment Lands Study** and **Phase II Non-Gateway Employment Lands Study** work.

The Strategy details a comprehensive assessment of the Region's 31 employment areas and compares them to other employment areas identified by upper- and single tier municipalities in the GGH. The assessment also included the City of Windsor and City of Sarnia, as they have direct access to international border crossing(s) with the United States, similar to Niagara.

Further, the Strategy offers recommendations that will help ensure that employment areas are protected and enhanced to support existing and future employment, while offering flexibility to adapt emerging / evolving employment trends.

Recommendations were developed by:

1. Completing an assessment of the Region's previous employment-related background studies.
2. Defining the Region's employment areas and understanding the relationship of employment areas and employment lands within current land use planning frameworks.
3. Reviewing best policy practices to identify common characteristics of employment areas and future employment areas across the GGH and evaluating how the Region's employment areas compare.
4. Refining the Strategy through stakeholder engagement workshops with local municipal planners and industry representatives.

1.3 Approach and methodology

The Strategy involved a two-phased approach.

Phase I involved extensive research into the Region's previous employment-related background studies that were used to develop existing ROP employment policy.

It also involved a cross jurisdictional review of policy and land use approaches used by other upper- and single-tier municipalities across the GGH to define employment areas, strategic employment corridors, and future employment areas, as well as by the Province to identify PSEZs.

The Region's employment areas were assessed based on the findings of the best practices review and existing physical and land use characteristics. A high-level analysis of the Region's strengths, weaknesses, opportunities and challenges is provided in section 6 of this Strategy.

Phase II involved developing policy recommendations based on previous best practice research and employment area assessments. These recommendations were further informed by feedback gathered through stakeholder engagement workshops.

A future Phase III of the Strategy should involve further consideration of whether the Region should identify lands for protection through a future employment area designation, PSEZ designation, or both.

2.0 EMPLOYMENT AREA CHARACTERISTICS

2.1 What are employment areas and what is the Region's role in planning for them?

Employment lands and employment areas are defined in many ways. They are described in terms related to their physical form and function, uses, activities and classifications based on like industries and business clusters. They are also defined by market functions and census tract characteristics for employment types and sectors. Finally, they are defined in Ontario through the policy-led planning framework which categorizes and defines "Employment Areas", lands and uses based on definitions in provincial policy.

Both the Provincial Policy Statement, 2014 (PPS, 2014) and A Place to Grow: Growth Plan for the Greater Golden Horseshoe (Growth Plan, 2019) provide a definition of employment that guides the planning framework in Ontario. Both define *Employment Areas* as "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" (PPS, 2014; Growth Plan, 2019).

A detailed review of the current Provincial and Regional policies related to "Employment Areas", employment lands and PSEZ's is provided in section 4 of the report. A new PPS [PPS (2020)] becomes effective on May 1, 2020. As discussed in Section 4.1, the PPS (2020) carries forward the existing definition for Employment Areas and contains additional policies aimed at ensuring land use compatibility and protecting existing and planned industrial and manufacturing land uses.

The Region has an important role in defining and protecting its employment areas. Through its land use planning policies, the Region is required to ensure its employment areas are well defined and that goals, objectives and policies are used to sustainably manage the growth of those areas and protect them from the encroachment of sensitive and non-employment land uses that may impact operations and functions. The Region's Strategy and policies for its employment areas needs to ensure the maintenance and enhancement of the areas through supportive infrastructure and investment. Employment areas should be retained for business and economic activities to provide for a stable and productive operating environment to ensure a broad range of jobs and a diverse economic base.

2.2 Physical characteristics of employment areas

From a land use perspective, employment areas can be made up of several individual land parcels that have existing or planned employment uses (i.e. manufacturing or office). Employment areas and lands may be designated for employment in local official plans and/or zoning by-laws and may have single or multiple uses ancillary to the primary employment use.

Niagara Region's employment lands and employment areas are shown in **Appendix A**.

Employment areas often include industrial uses (i.e. heavy industrial or light industrial). Industrial uses generally contain operations and facilities that require distance separation from non-employment uses due to noise, emissions, odour, and other negative impacts. Industrial uses generally include manufacturing, processing, fabrication, warehousing, distribution / logistics, and transportation services.

Employment areas may also contain office, retail, institutional, service commercial, and other ancillary uses to support primary employment uses. These uses can contribute to enhancing the overall function of an employment area.

Generally, the Region's 31 employment areas share similar physical and land use characteristics.

- **Physical geography** - employment areas are typically located on flat to slightly rolling topography, where large tracts of land can be assembled with minimal environmental constraints. Large parcels enable the opportunity to cluster similar sector uses that require large spaces for processing and storage.
- **Parcel orientation and access to transportation networks** - roads within employment areas tend to follow a grid system to optimize accessibility, circulation, and parcel configuration. Parcels are typically square or rectangular in shape to optimize site design and function. Employment areas require access to Provincial and Regional transportation networks. These include major goods movement facilities and corridors (i.e. international border crossings, airports, marine facilities, rail facilities, and intermodal facilities), and on-site infrastructure (i.e. roadways and utilities).
- **Land use and municipal infrastructure** – employment areas require a critical mass of appropriately zoned, vacant, shovel-ready land. The ability to connect to existing or planned municipal servicing infrastructure – both on- and off-site – such as water and waste water systems, utilities, and hydro are highly desired. The availability of this infrastructure varies within each employment area.

These attributes have the ability to significantly influence the viability, risk, and timeliness of employment-related development and redevelopment.

The specific attributes that are required for an employment area to be successful are largely based on the intended function and designations. These attributes are discussed in more detail below, with regard to industrial areas and business parks which are among the most common typologies of employment areas in Southern Ontario. These physical factors are also considered in the assessment of the Region's employment areas to help define the areas' current opportunities and constraints.

2.2.1 *Industrial areas*

Industrial areas within Southern Ontario offer a mix of heavy, general, and light industrial uses and primarily accommodate employment sectors related to manufacturing, utilities, wholesale trade, distribution and warehousing, transportation, and ancillary commercial service uses to the primary employment use. Industrial areas typically require the following physical attributes:

- **Access** – proximity to controlled access highways is critical for the success of industrial areas that have a significant degree of manufacturing, wholesale trade and warehousing, distribution and/or other industrial uses.
- **Transportation infrastructure** – increased globalization of the industrial economy has elevated the importance on the interdependence of domestic companies and their suppliers. As a result, there is an increasing trend for distribution activities to agglomerate share access to major goods movement facilities and corridors.
- **Critical mass** – large unconstrained parcels of land are attractive to prospective industrial employers. Generally, a minimum of 80 ha (200 acres) is needed to achieve the critical mass for an industrial park to provide reasonable presence, choice and economies of scale. However, there is demand for industrial areas which focus on warehousing and transportation to be larger, sometimes in excess of 200 ha (500 acres).
- **Parcel size** – should vary to accommodate medium- to large-scale, land-extensive warehousing and distribution facilities (i.e. >2 ha). For smaller to mid-size facilities (i.e. <2 ha.), manufacturing / assembly, distribution and retailing are often integrated within facilities.
- **Location** – must provide efficient and effective vehicular access and circulation, particularly for freight movement including heavy truck traffic, with a minimum of two access points to enter / exit the industrial area.
- **Land use compatibility** – separation and buffering of industrial uses are important to ensure public safety through minimizing noise, odour, truck traffic, and air pollution experienced by nearby non-employment and other sensitive land uses.
- **Market choice** – parcel size, configuration, and servicing (i.e. water, wastewater, hydro, internet) must be conducive for a wide range of employment uses, especially for land extensive industrial uses that may require large-volume high-pressure servicing connections.
- **Competitive development / operating costs** – price of land and servicing must be competitive with other municipalities in the GGH. High costs can discourage prospective employers who require large parcels for operation and storage.

2.2.2 *Business parks*

Business parks typically include light industrial and office uses and require the following physical attributes:

- **Access / exposure** – visibility to controlled access highways or major arterial roadways are desired, particularly for office uses.
- **Critical mass** – parcels must be large enough to foster a sense of place and allow for on-site amenities. Unlike industrial areas, business park uses are less likely to require large contiguous parcels for operation and function.
- **Land use compatibility** – appropriately integrating light industrial uses with nearby non-employment and other sensitive land uses with minimal buffering, providing that potential land-use conflicts are addressed.

- **Employment-supportive uses** – are beneficial when clustered at major intersections, gateway locations, or located within transition areas between light industrial and other non-employment uses.
- **Sense of place / character** – through high-quality building design, streetscaping, and landscaping. These elements can be promoted by municipalities through site plan controls, zoning by-laws, and urban design guidelines.

Physical attributes for industrial areas and business parks are useful in identifying similar employment areas across Niagara and understanding how they compare to the GGH and Southern Ontario.

Detailed findings related to physical and socio-economic market conditions of the Region's employment areas are attached as **Appendix B**.¹

¹ Appendix B reflects the most recently available data from the 2019 Niagara Employment Inventory.

3.0 REGIONAL CONTEXT

3.1 Niagara's context and characteristics

Niagara Region is a two-tiered governance structure, comprised of a single upper-tier municipality and twelve lower-tier local municipalities.

Located on the Niagara Peninsula in Southern Ontario between the southern of Lake Ontario and northern shore of Lake Erie, the region makes up the southern end of the GGH and borders the United States along the Niagara River.

Geographically, Niagara is well-positioned to provide unique location-based benefits for employers in terms of access to international trade corridors and major goods movement facilities. In addition to the Welland Canal that provides a strategic trade corridor for freight, the Region is optimally located to facilitate the movement of goods and people for inter and intra-regional trade and tourism.

Niagara is recognized by Federal and Provincial governments for its advantageous geographic location for international goods movement.

The Federal government recognizes the Region in its entirety as a Foreign Trade Zone Point, meaning that employers can utilize a one-window approach to access Federal, Provincial, and Regional programs that support Canada's export development efforts.

The Foreign Trade Zone Point enables employers located within it to be eligible to receive tariff and tax exemptions with respect to the purchase or importation of raw materials, components or finished goods. Such materials and goods can generally be stored, processed or assembled in the Greater Toronto Hamilton Area (the "GTHA") for re-export (in which case taxes and duties generally would not apply) or for entry into the domestic market, at which time taxes and duties would be deferred until the time of entry.

The Province, through the Growth Plan, recognizes a Gateway Economic Zone and Gateway Economic Centre in Niagara. These areas are distinguished for their unique economic importance to the region and Ontario based on proximity to major international border crossings. There are no other areas in the Province that have these designations.

The Region has specifically identified the Gateway Economic Zone and Gateway Economic Centre and how it serves as a regionally significant employment area within section 3 of the ROP.

3.1.1 *Employment trends*

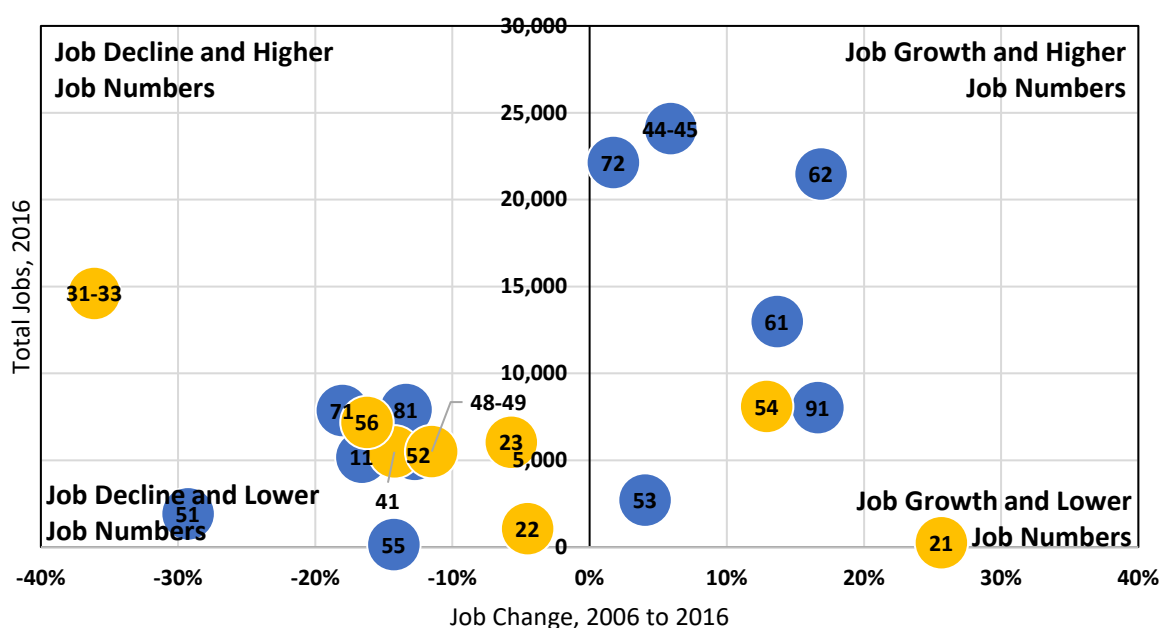
Between 2006 and 2016, Niagara experienced a five percent (5%) decline in total number of jobs. However, not all employment sectors experienced this trend.

Using the North American Industry Classification System (NAICS), pre-defined employment sectors traditionally found in employment lands and employment areas include:

- Mining and oil and gas extraction (21)
- Utilities (22)
- Construction (23)
- Manufacturing (31-33)
- Wholesale trade (41)
- Retail trade (44-45)
- Transportation and warehousing (48-49)
- Professional, scientific and technical services (54)
- Administrative and support, waste management and remediation services (56)
- Health care and social assistance (62)
- Accommodation and food services (72)

Figure 1 illustrates employment sector trends by both the total number of jobs and the change in the number of jobs during the period between 2006 and 2016.

Figure 1: Niagara Region employment in 2016 and employment change from 2006 to 2016 by sector and by place of work.



Source: Statistics Canada, Census of Population, 2006 and 2016.

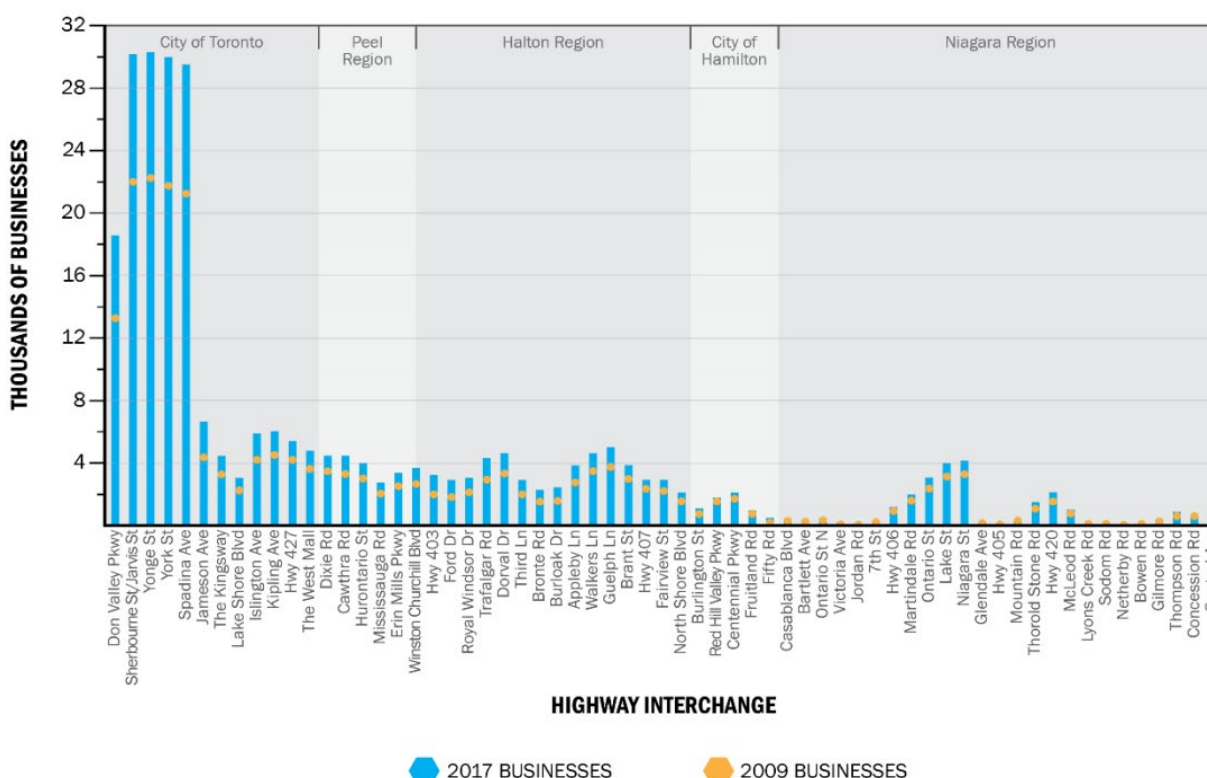
Legend	
11 Agriculture, forestry, fishing and hunting	54 Professional, scientific and technical services*
21 Mining and oil and gas extraction*	55 Management of companies and enterprises
22 Utilities*	56 Administrative and support, waste management and remediation services*
23 Construction*	61 Educational services
31-33 Manufacturing*	62 Health care and social assistance
41 Wholesale trade*	71 Arts, entertainment and recreation
44-45 Retail trade	72 Accommodation and food services
48-49 Transportation and warehousing*	81 Other services (except public administration)
51 Information and cultural industries	91 Public administration
52 Finance and insurance	
53 Real estate and rental and leasing	<i>* Jobs often found on employment lands</i>

3.1.2 Locational characteristics

The Region features efficient transportation links to the GTHA market via major goods movement facilities and corridors, including the QEW, 400 series highways (i.e. Highway 406, Highway 420, Highway 405), higher order transit (i.e. GO Rail service), ports (i.e. Hamilton Harbour, Port Weller), airports (i.e. Hamilton International Airport, Niagara District Airport), and the Welland Canal.

Figure 2 illustrates how proximity to the QEW is linked to employment concentrations in the GTHA.

Figure 2: Business counts for Gardiner/QEW Highway Interchanges within three kilometer radius, 2009 and 2017.



Source: Gregory Spencer, *Economic Clusters in the Greater Toronto and Hamilton Area and Their Relationship with the Region's Transportation Infrastructure*, April 2018, Rotman School of Management, University of Toronto, with data from Dun and Bradstreet.

The Region is also involved in several significant transportation initiatives that would further improve access to the GTHA.

The Region continues to consult with the Province for a Niagara-Hamilton Trade Corridor to be established to improve connections to the GTHA and other Southern Ontario markets, such as London and Windsor.

Further, the Region is working with Metrolinx to ensure the successful implementation of year-round daily GO Rail service. Currently, there are existing stations in St. Catharines and Niagara Falls, with a planned station in Grimsby (Casablanca), and a future potential station in Lincoln (Beamsville). The Region continues to advocate for GO service enhancements that will further integrate Niagara with the GTHA and facilitate improved commuter and non-commuter travel.

3.1.3 Land supply characteristics

In 2019, the Region, in consultation with local municipalities, undertook a detailed inventory of its employment lands with the purpose of identifying its employment areas.

Employment areas were identified as clusters of industrial, manufacturing, and major office uses within the Region. Once delineated, each respective local municipality was consulted to confirm these areas based on existing official plan and zoning by-law land use policy.

The identification of employment areas excluded designated employment lands that:

- are occupied by a non-employment use (i.e. residential or commercial);
- have a single operation and is separated from other employment parcels and uses;
- have become vacant brownfield sites and are surrounded by non-employment uses; and
- contain an operation that requires significant mitigation measures and setbacks from high density employment or non-employment uses.

The complete inventory includes approximately 2,300 designated employment parcels totaling 6,550 ha of land, with an average parcel size of 2.6 ha. Of Region's the total employment land, approximately 5,338 ha (82%) are developable. Of developable employment lands, 3,220 ha (60%) have been developed, while the remaining 2,118 ha (40%) are vacant.

The vast majority of vacant employment lands (87%) are located within Gateway Economic Zone and Gateway Economic Centre municipalities, as shown in **Table 1** below:

Table 1: Vacant employment lands within Niagara Economic Gateway municipalities.

	Niagara Economic Gateway municipality	Vacant employment lands	Total vacant employment lands
Gateway Economic Centre	Thorold	643 ha	1,461 ha
	Port Colborne	427 ha	
	Welland	391 ha	
Gateway Economic Zone	Niagara Falls	242 ha	388 ha
	Fort Erie	146 ha	
			1,849 ha

The following are land supply characteristics of Niagara's designated employment areas:

- 31 total employment areas.
- 3,593.34 ha of total land within employment areas.
- When accounting natural heritage areas and features, 2,982.12 ha of the total land is developable.
- Of the developable land, 1,999.49 ha (67%) has existing development, while 982.63 ha (33%) remain vacant.
- Average employment area density of 23 jobs per hectare.²

² Based on most recent 2019 Niagara Employment Inventory data.

3.2 Overview of Niagara's employment areas

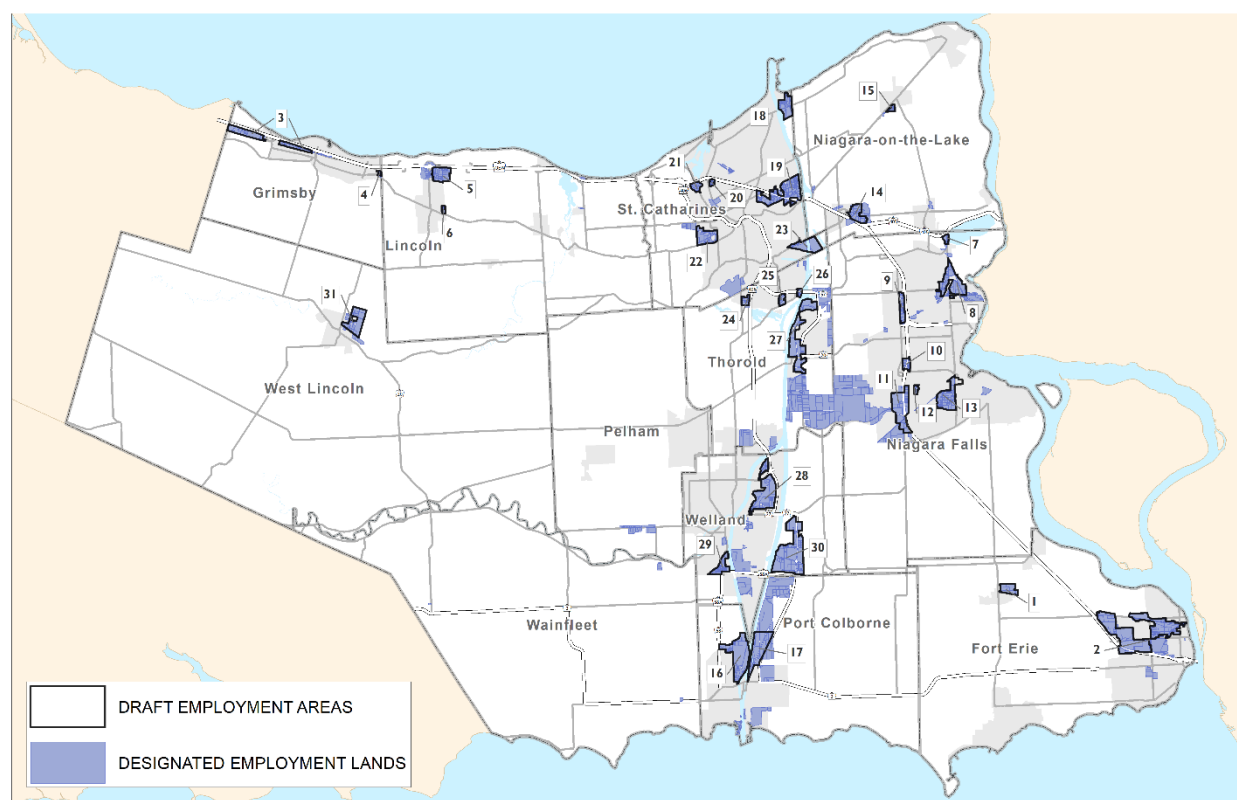
The Region's 31 employment areas vary significantly from one another in terms of physical characteristics (i.e. size, land use, location, age of building stock, built form) and socio-economic market conditions (i.e. vacancies, land value, servicing costs).

The Region's employment areas tend to be located in close proximity to major transportation facilities, particularly major highways including the QEW, Highway 406, Highway 405 and Highway 420. Some employment areas also have direct or potential access to other transportation corridors such as rail corridors and the Welland Canal.

These corridors are attractive to employers that require rail and shipping for inter-regional trade and freight movement. Proximity to these transportation corridors provides enhanced access to the Canada-US border, with nearly all employment areas being located within 70-kilometres from an international border crossing.

A map of the Region's identified employment areas is shown in **Figure 3**. This same visual is shown in **Appendix A**.

Figure 3: Niagara Region's employment lands and employment areas



3.2.1 Land use characteristics

Niagara's employment areas share several commonalities.

- **Transportation and infrastructure** – The majority employment areas are located within 2 kilometres from a Provincial highway that provides direct access to international border crossings

and the rest of the GGH. Several employment areas are located adjacent or in close proximity to border crossings providing opportunities to support transportation and logistics-related employment uses. Employment areas near the Welland Canal have opportunity to support employment uses that rely on shipping and navigation. Several employment areas located in rural settings lack proximate access to major transportation corridors and are serviced solely by Regional and/or local roads (i.e. West Lincoln, Port Colborne, Welland and Thorold).

- **Critical mass** – Employment areas vary from smaller clusters of warehousing and transportation-related uses (approx. 2 ha), to large-scale industrial sites that support major employment generators (up to 300 ha). The majority of employment areas support less than 20 individual parcels; however, there are cases where one large parcel with a single employment use comprises the majority of an employment area (i.e. Jungbunzlaeur site, Port Colborne). The development of larger employment areas is integral to attracting and sustaining industrial and transportation-related employment.
- **Parcel size** – The majority of parcels within employment areas range between 0.2 ha to 2 ha in size. Larger vacant parcels exist however, they are scarce. A parcel's context may influence its viability to certain employers. For example, a parcel may be 2 ha in size, but encumbered by 1 ha of natural heritage features. Therefore, while the parcel is 2 ha in size, only 1 ha can actually be developed. This scenario will arise in several employment areas and presents a challenge when attracting and accommodating future employment uses on smaller parcels due to fragmentation.
- **Land use compatibility** – Many employment areas are surrounded by lands that do not present compatibility issues. In some cases, adjacent major retail and commercial uses provide separation and buffering between the employment area and other sensitive land uses. However, there are instances where employment areas are constrained due to land use compatibility issues. For example, there are employment areas in Fort Erie and Port Colborne that are significantly constrained by natural features including wetlands and woodlots. The presence of natural features can limit the amount of developable employment land and restrict access to major goods movement facilities and corridors.

3.2.2 *Socio-economic market conditions*

An assessment of the Region's employment areas revealed several deliberations that should be further considered:

- **Value proposition** – Niagara continues to gain attention as a relatively affordable and viable alternative for employers—and families—as land values and costs of living in the GTHA increase. More specifically, Niagara is an attractive option to employment sectors that do not require core urban settings and access to a high concentration of professional services to operate / function.
- **Leveraging existing and future transportation infrastructure** – Existing and planned major goods movement facilities and corridors contribute towards offering both existing and new employers with benefiting from improved market access and linkages to supply chains.
- **Technology and employment densities** – Employers are transitioning to emerging technologies (including robotics, automation and high-performance computing) and new process (including rapid prototyping, custom manufacturing and flexibility in output volumes) to develop goods.

Advanced manufacturing presents a challenge when planning for employment lands. Future manufacturing facilities may take up a large amount of space, while requiring fewer jobs with higher wages, as technology displaces production process labour.

- **Prioritization of employment lands** – Recognizing the current over supply of employment lands across the Region and the limited anticipated demand for these types of lands over the short to medium-term planning horizon, it may be prudent to reconsider the nature and mix of uses permitted on these sites. With respect to smaller, more urban and potentially fragmented employment areas, these sites may be desirable locations for a range of more contemporary, high-density employment uses and employment-supportive uses that align with the underlying long-term policy goals and objectives of the Region. This would enable the Region to capitalize on more immediate opportunities for growth and investment as market conditions evolve.
- **Leverage existing industry clusters** – Niagara is well-established as an agricultural hub within Ontario, with existing and prospective agricultural businesses attracted to the area for its existing locational benefits. There is opportunity to continue to build upon this existing employment sector by supporting related industries, such as food-processing, food-related manufacturing (e.g., containers, equipment/machinery) and food sciences (e.g., sustainable crops, food supplements). Similarly, the location of greenhouses and other specialty crops in employment areas present an opportunity to preserve prime agricultural and specialty crop lands.
- **Opportunity for new industry clustering** – Undeveloped employment lands offer flexibility to accommodate new or emerging employment trends. This flexibility is important in responding to evolving market conditions and can be leveraged by the Region through identification in a long-term growth strategy.
- **Investment readiness** – the ease of market entry and the ability for municipalities to respond and accommodate unique requirements of prospective employers is highly valued. Municipalities should focus on equipping employment lands with appropriate land use permissions and ensuring that connections to utilities and municipal servicing are readily available. The Region's significant supply of vacant employment lands can be leveraged as a competitive advantage if these sites are proactively addressed to become shovel-ready for development.

3.3 Relationship to Provincial Land Needs Assessment

Employment areas are based on current designations in local official plans and zoning by-laws and are not based on employment land need requirements to 2041. Rather, the analysis and recommendations from this Strategy will assist in identifying locations that are most suitable for potential employment area conversion or existing area expansion through the land needs assessment.

4.0 POLICY CONTEXT

Ontario's land use planning framework is directed by Provincial policy which guides land use policy documents and instruments at municipal levels.

The following section reviews the applicable policy framework to the Region's employment areas.

4.1 Provincial Policy Statement (2020)

Issued in accordance with section 3(1) of the *Planning Act, 1990*, the Provincial Policy Statement provides policy direction on matters of provincial interest related to land use planning and development. The currently in-force PPS is the PPS (2014). New PPS policies will take effect on May 1, 2020 through the new PPS (2020). In accordance with section 3 of the *Planning Act*, all decisions affecting land use planning matters made after this date shall be consistent with the PPS, (2020). Due to the timing of the Employment Area Strategy and its implementation, the PPS (2020) has been assessed herein.

Employment policies of the PPS (2020) require planning authorities to promote economic development and competitiveness by providing for an appropriate mix and range of employment, institutional and a broader mixed uses. The PPS (2020) also supports facilitating conditions for economic investment by identifying strategic sites for investment, monitoring the availability and suitability of employment sites, including market-ready sites, and seeking to address potential barriers to investment.

The PPS (2020) recognizes the importance of land use compatibility with respect to major facilities and employment uses that may have adverse impacts on adjacent sensitive land uses. Under Policy 1.2.6.1, the PPS (2020) states that major facilities and sensitive land uses shall be planned and developed to avoid, or if avoidance is not possible, minimize and mitigate any potential adverse effects from odour, noise and other contaminants, minimize risk to public health and safety, and to ensure the long-term operational and economic viability of major facilities in accordance with provincial guidelines, standards and procedures. Where avoidance is not possible, the PPS (2020) emphasizes protecting the long-term viability of existing or planned industrial, manufacturing or other uses that are vulnerable to encroachment by ensuring the planning and development of proposed adjacent sensitive land uses are only permitted subject to criteria and where adverse effects to both employment and sensitive land uses are minimized and mitigated.

The PPS (2020) also contains specific policies related to employment areas.

Policy 1.2.6 addresses land use compatibility and provides for new policies directed at further protecting major industry and industrial uses. These policies now require avoidance of any adverse effects and where not possible, minimization and mitigation of effects from odour, noise and other contaminants to ensure the long-term operational and economic viability of *major facilities* in accordance with provincial guidelines, standards and procedures.

Policy 1.2.6.2 also requires planning authorities to protect the long-term viability of existing or planned industrial, manufacturing or other uses that are vulnerable to encroachment by ensuring that the planning and *development* of proposed adjacent *sensitive land uses* are limited.

Policy 1.3.2.1 requires the protection and preservation of employment areas for current and future uses.

Policy 1.3.2.2 permits the assessment of employment areas identified in local official plans during an official plan review or update to ensure that this designation is appropriate. Employment areas planned for industrial or manufacturing are to provide for separation or mitigation from sensitive land uses to maintain operational and economic viability of planned uses and functions.

Policy 1.3.2.3 permits prohibiting residential and other sensitive land uses within employment areas planned for industrial or manufacturing uses to maintain land use compatibility.

Policy 1.3.2.4 permits the conversion of lands within employment areas is through an MCR only where it has been demonstrated that the land is not required for employment purposes over the long term and that there is a need for the conversion.

Policy 1.3.2.5 permits the conversion of lands within existing employment areas to non-employment uses until the next MCR provided the area is not identified as provincially or regionally significant; the land is not required for employment purposes over the long-term; the proposed uses would not adversely affect the overall viability of the employment area; and existing or planned infrastructure and public service facilities are available to accommodate the proposed use.

Policy 1.3.2.6 protects employment areas in proximity to major goods movement facilities and corridors for employment uses that require those locations.

Policy 1.3.2.7 permits planning authorities to plan beyond the 25-year planning horizon for the long-term protection of employment areas, provided the lands are not designated for employment purposes beyond the 25-year planning horizon.

4.2 Growth Plan for the Greater Golden Horseshoe (2019)

Policy 2.2.5.6 of the Growth Plan directs upper- and single-tier municipalities to designate all employment areas in official plans and protect them for appropriate employment uses over the long-term. For greater certainty, the Growth Plan permits the incorporation of employment areas into upper- and single-tier official plans by amendment at any time in advance of the next MCR.

Policy 2.2.5.7 directs municipalities to plan for all employment areas within settlement areas by prohibiting residential use and prohibiting or limiting other sensitive land uses, and prohibiting or establishing a threshold for major retail uses.

Policy 2.2.5.9 establishes the process for converting lands within employment areas to non-employment uses through a MCR where it is demonstrated that certain criteria are met.

Notwithstanding Policy 2.2.5.9 of the Growth Plan, Policy 2.2.5.10 permits lands within existing employment areas to be considered for conversion to non-employment uses provided that there is a demonstrated need for the conversion, and that the proposed uses would not adversely affect the overall viability of the employment area or achievement of the minimum intensification and density targets. Additionally, the conversion would have to maintain a significant number of jobs on those lands through the establishment of development criteria and would not include any part of an employment area identified as a PSEZ.

Policy 2.2.5.18 of the Growth Plan recognizes a Gateway Economic Zone and Gateway Economic Centre near the Niagara-United States border, which are shown on Schedules 2, 5 and 6 to the Plan.

The Gateway Economic Zone and Gateway Economic Centre are recognized for their importance to cross-border trade with the United States.

The Growth Plan defines the Gateway Economic Zone and Gateway Economic Centre, respectively, and limit their application to settlement areas.

4.2.1 *Provincially significant employment zones*

Recent changes to the Growth Plan introduced the concept of PSEZs and initially identified 29 such areas across the GGH. There are currently no PSEZs identified within Niagara.

In the short-term, a PSEZ protects employment areas from conversion prior to a MCR without a more comprehensive assessment approved by the Province.

In the long-term, it is intended to provide the basis of a Regional Economic Development Strategy as areas that will help drive job growth and prosperity.

The Province identified PSEZs by using one or more of the following criteria to evaluate employment areas:

1. Is a designated employment area inside an existing settlement area boundary;
2. Is vulnerable to conversion or encroachment of non-employment uses;
3. Is attractive to new investment, able to retain existing industries, and support industrial uses;
4. Is located near and has access to major goods movement facilities and corridors;
5. Has a high concentration of employment and/or economic output; and,
6. Are contiguous zones and contain large unconstrained developable parcels (e.g. >10 acres).

4.3 Niagara Region Official Plan (2014 Office Consolidation)

The ROP is the guiding planning document for physical, economic, and social development of Niagara.

Policies related to employment are contained in section 3 of the ROP, while policies on conversion of employment to non-employment uses are contained in section 4.E.

Section 3.A provides the general policy framework of the Niagara Economic Gateway.

The vision for the Niagara Economic Gateway is to attract investment and promote employment growth in Strategic Locations for Investment to transform vacant employment lands into a diversified mix of vibrant, attractively designed, accessible and sustainable employment areas.

Through the Region's Phase I Gateway Employment Lands Study, six Strategic Locations for Investment were identified within the Niagara Economic Gateway. These locations are listed in **Table 2** and are intended to be focused areas for employment growth.

Policies 3.A.3.4 to 3.A.3.9 establish a concept for each of the strategic locations which capitalize on their unique geographic and market conditions along with access to major goods movement facilities and corridors.

Additionally, these policies establish a set of land use planning 'tools' for each employment area to implement their respective concepts and generally include the preparation of a master or secondary plan; preparation of supporting plans for servicing and transportation; preparation of urban design guidelines; preparation of an investment strategy to attract target industries; and updating of relevant local plans and policies.

Table 2: Concepts for areas of strategic investment within the Niagara Economic Gateway

Brock Business Park	The concept for the Brock Business Park Revitalization is to capitalize on market opportunities for research and development and the close proximity to Brock University and Highway 406 by transforming the area into an integrated, mixed use, campus-style setting which caters to incubators, innovator, limited office uses, and related uses.
Highway 406 Economic Gateway	The Concept for the Highway 406 Economic Gateway is to capitalize on proximity and access to Highways 140 and 406 by attracting industries in transportation, logistics, warehousing, food processing, advanced manufacturing and wholesale trade activities and other uses set out in the local official plan.
Welland Canal Green Manufacturing and Assembly Zone	The concept for the Welland Canal Green Manufacturing and Assembly Zone is to capitalize on proximity and access to the Welland Canal and relative proximity to the 400 series highway network and rail lines by identifying a location for large scale green manufacturing and assembly industries and other heavy industries which require specialized transportation modes. Recognizing the servicing constraints, the Region is supportive of a transitional approach to development, which might include dry industrial development as an interim use.
Fort Erie Industrial Park	The concept for the Fort Erie Industrial Park is to capitalize on market opportunities for advanced manufacturing, cross border trade, transportation and warehousing industries.
Niagara Falls Priority Investment Area	The concept for the Niagara Falls Priority Investment Area is to capitalize on market opportunities for cross border trade by identifying a location for secure storage, warehousing and logistics facilities in close proximity to a border crossing. These lands include the areas within the Niagara Falls Community Improvement Plan Pilot Project Area.
Niagara Falls QEW Business Park	The concept for the Niagara Falls QEW Business Park is to capitalize on long-term opportunities for business and services in close proximity to 400 series highways focusing on manufacturing, warehousing and other employment land uses.

Policy 3.A.3.3 recognizes the St. Catharines Urban Growth Centre as the primary location for major office uses. The policy notes that office uses within the Gateway Economic Zone and Gateway Economic Centre are to be limited in size and scope.

The ROP also encourages intensification of employment land through policies 3.A.3.10-11, and sets out policies for Community Improvement Plans, master plans and the development permit system in policies 3.A.3.12-15.

Policy 3.A.3.16 states that a similar strategy is to be prepared for non-gateway employment lands.

Through the Region's **Phase II Non-Gateway Employment Lands Study**, six Strategic Locations for Investment are identified across the non-gateway municipalities of Grimsby, Lincoln, West Lincoln, St. Catharines, Niagara-on-the-Lake, Pelham and Wainfleet and are listed in **Table 3**.

Table 3: Concepts for strategic locations for investment outside of the Niagara Economic Gateway.

Grimsby QEW Corridor Employment Lands	The Grimsby QEW Corridor Employment Lands are established and contain a collection of mixed industrial uses. The concept for the Grimsby QEW Corridor Employment Lands is to promote development and re-development for advanced manufacturing, food processing, research and development, light manufacturing and warehousing uses. The intention is to maintain and support the Town of Grimsby's QEW Corridor Employment Lands, promote intensification, and leverage future redevelopment opportunities associated with Provincial infrastructure investments.
Beamsville Industrial Park	The Beamsville Industrial Park contains a mix of employment uses and is situated close to the QEW. The concept for the Beamsville Industrial Park is to support opportunities for agribusiness which is of an industrial nature, food processing, light industrial development, warehousing and logistics type uses. Over time, depending on the timing of future Provincial transit investments, there may be expanded market opportunities for office and other prestige employment uses.
Glendale Business Park	The Glendale Business Park is one of Niagara's premier prestige business parks. The concept for the Glendale Business Park is to leverage proximity to Niagara College and the QEW corridor by designating lands for business park development. The Glendale Business Park has an approved secondary plan in place that provides the detailed development vision for the area.
The Eastchester Industrial Area	The Eastchester Industrial Area contains several well-established industrial uses and has access to the QEW in St. Catharines. The concept for the Eastchester Industrial Area is to support existing businesses and capitalize on opportunities for transportation, warehousing and logistics, as well as opportunities for light and advanced manufacturing.
West St. Catharines Employment Area	The West St. Catharines Employment Area is generally located in one of the City's last remaining clusters of vacant greenfield land. It is in close proximity to the St. Catharines General Hospital, the CN Rail Corridor, and is relatively

	close to Brock University. The concept for the West St. Catharines Employment Area is to promote development and redevelopment of uses related to research and development, medical and bio-medical manufacturing, bio-sciences and other complementary uses.
Port Weller Industrial Area	The Port Weller Industrial Area is located at the north end of the City of St. Catharines, along the Welland Canal. The area is located near existing residential uses and could also benefit from improved transportation connectivity.

5.0 PLANNING POLICY

MUNICIPAL BEST PRACTICES

5.1 Approaches to employment areas in the GGH

The upper and single-tier municipalities of Durham Region, York Region, Region of Waterloo, Region of Peel, County of Simcoe, City of Hamilton, and City of Toronto were examined to better understand municipal approaches to employment area planning and the identification of strategic employment areas.

Given Niagara's unique location as the only upper- or single-tier municipality within the GGH with direct access to an international border, policy approaches from other Southern Ontario border municipalities (City of Windsor and City of Sarnia) were also examined to better understand the influence of cross-border trade on the identification and protection of employment areas.

Detailed findings of this cross jurisdictional review are in **Appendix C**.

5.1.1 Halton Region

Regional Official Plan Amendment (ROPA 38) was the implementing amendment resulting from Halton's last Official Plan Review, "Sustainable Halton", which was undertaken between 2006 and 2012.

As a result of the Sustainable Halton Background Report Urban Structure, Long-Term Growth Areas, 2007, five strategic employment areas were identified for consideration for long-term protection. The Sustainable Halton review process determined that these employment areas were not considered for residential or urban uses. Identified employment areas are located outside of established urban area boundaries and are contiguous to existing employment lands within urban area boundaries.

ROPA 38 also established a "future strategic employment areas" overlay and policy framework for the long-term protection of potential employment areas given their location in relation to major transportation facilities and existing employment areas. These areas are protected beyond a 20-year horizon.

The future strategic employment area overlay is not a land use designation and does not identify permitted uses.

Policies 139.6 and 139.7 of Halton's ROP protect future strategic employment areas from the encroachment of incompatible uses. Policy 137.9(1) prohibits the conversion of lands within these areas to incompatible uses.

5.1.2 *Region of Waterloo*

The Region of Waterloo Official Plan emphasizes the importance of transportation corridors to the development of employment areas.

Policy 4.A.3 encourages area municipalities to designate and preserve lands within the urban area in the vicinity of existing major highway interchanges, rail yards and the Region of Waterloo International Airport as employment areas, where appropriate.

Policy 4.A.2 supports strategic development of employment areas in the vicinity of the Region of Waterloo International Airport and ensuring that these lands are readily available for development upon bringing them into the urban area.

Within the Planned Community Structure of the Region of Waterloo's Official Plan, two strategic employment areas are identified with unique land use designations: The Prime Industrial / Strategic Reserve and Highway 401 / Regional Road 97 Employment Area.

The Prime Industrial / Strategic Reserve identifies prime industrial lands in the vicinity of the Region of Waterloo International Airport. The purpose of this designation is to ensure an adequate supply of industrial land is available for new large-lot manufacturing or business park uses serviced by a municipal drinking-water supply system and a municipal wastewater system. In this designation, lands are intended to be developed as parcels >8 ha in size.

The Highway 401 / Regional Road 97 Employment Area is intended to provide additional opportunities for employment growth and employment within the Township of North Dumfries. Development within this designation is limited to privately serviced logistics and warehousing uses that require close access to the Highway 401 corridor to efficiently move goods into and out of the region.

5.1.3 *Region of Durham*

While no hierarchy of employment lands is explicitly identified, Durham's ROP places emphasis on protecting transportation corridors for employment uses.

In particular, the Highway 401 and Highway 407 and Regional corridors are identified as areas that attract prestige businesses, including major office and manufacturing uses.

Durham's ROP highlights the importance of future major infrastructure, such as the proposed Pickering Airport and Seaton Community that, while currently not built, represent significant employment opportunities in the future.

Durham's ROP policy 8.1.17 establishes employment areas as areas that provide for the development of industries and businesses that require separation from sensitive land uses. Additionally, these areas are set aside for uses that may require access to major goods movement facilities and corridors or benefit from locating close to similar uses.

Permitted uses within employment areas include manufacturing, assembly and processing goods, service industries, research and development facilities, warehousing, offices and business parks, hotels, storage of goods and materials, freight transfer and transportation facilities.

5.1.4 York Region

York Region's Official Plan, 2010 (YROP) identifies and protects "strategic employment lands" consisting of employment lands located in close proximity to existing or planned 400-series highways.

The YROP requires strategic employment lands to be designated for employment uses in local municipal official plans. In total, the YROP identifies seven strategic employment areas.

Four of the York Region's local municipalities (Georgina, Markham, Vaughan and Whitchurch-Stouffville) have existing employment designations that meet the criteria for prime employment areas.

Prime employment areas are characterized by low density employment uses that are in proximity to major goods movement facilities and corridors. The most common uses in prime employment areas are manufacturing, warehousing and logistics.

York Region also undertakes regular inventories of its vacant employment lands. In 2017, the Region had approximately 2,588 net hectares of vacant employment land.

5.1.5 Region of Peel

The Region of Peel identifies employment areas designated in local official plans to be protected and for employment uses. Employment areas include lands designated for office and industrial uses, and in the case of the City of Mississauga, include specific corporate centres.

The Region of Peel's Official Plan also provides direction for employment areas to be located adjacent or in proximity to major goods movement facilities. Specifically, areas in the vicinity of the Toronto Pearson International Airport, major highway interchanges and rail yards shall be protected and supported for future employment areas for manufacturing, warehousing and associated retail, office and ancillary uses.

5.1.6 County of Simcoe

Amendment 1 to the Growth Plan for the Greater Golden Horseshoe, 2006 introduced policies specific to the County of Simcoe due to the intense development presence resulting in part from the introduction of Growth Plan policies in 2006. The Simcoe Sub-Area is comprised of the County of Simcoe and the cities of Barrie and Orillia. The Simcoe Sub-Area policies establish a framework for sustainable growth in the Simcoe Area to, among other goals, boost job creation in the region. Simcoe Sub-Area policies were retained, with modifications, in the Growth Plan, 2017.

The establishment of strategic employment areas to optimize the Highway 400 corridor and create conditions for investment in manufacturing and related employment uses is identified as a key priority for ensuring sustainable long-term growth. The Growth Plan, 2017 recognizes the Highway 400 corridor as the Simcoe Area's most significant transportation and goods movement corridor and subsequently identified two strategic employment areas along Highway 400 to accommodate clusters of manufacturing and industrial uses that serve major markets.

A clear policy framework is established in the Growth Plan, 2017 and includes criteria for the appropriate size, location, uses and lot sizes within strategic employment areas. Strategic settlement employment areas and economic employment districts are identified as strategic areas for employment growth in the Simcoe Sub-Area.

Strategic settlement employment areas are defined in the Growth Plan, 2017 as "areas that have been identified by the Minister that are to be planned and protected for employment uses that require large lots of land and depend upon efficient movement of goods and access to Highway 400. These are not settlement areas or prime employment areas. Major retail and residential uses are not permitted."

Economic employment districts are defined in the Growth Plan, 2017 as "areas that have been identified by the Minister that are to be planned and protected for locally significant employment uses. These areas are not settlement areas."

Under Policy 6.4.2, the Minister, in consultation with affected municipalities and stakeholders, determines the location and boundaries of strategic settlement employment areas, and establishes permitted uses and mix of uses, lot sizes and additional policies and definitions that apply to those areas. Local area municipalities are required to delineate strategic settlement employment areas in their official plans and develop official plan policies for their implementation.

The policy framework of the Growth Plan recognizes the need to provide large, continuous, tracts of land in close proximity to major transportation corridors to accommodate specific types of employment uses within the Simcoe Sub-Area, outside of identified settlement areas.

Under policy 6.3.4, the Town of Innisfil, the Town of Bradford West Gwillimbury and the Town of New Tecumseth are to direct a significant portion of population and employment forecasted to the applicable primary settlement areas.

The Simcoe County Official Plan recognizes two strategic settlement employment areas (Lake Simcoe Regional Airport and Rama Road) and two economic employment districts (Innisfil Heights and Bradford West Gwillimbury). Development within these designated areas is to be in accordance with the respective directive issued by the Minister of Infrastructure.

5.1.7 City of Hamilton

The Urban Hamilton Official Plan, 2011 (UHOP) recognizes the importance of older industrial areas and existing and newly developing businesses parks.

The UHOP establishes four employment area designations, each with unique permitted uses and land use policies. The four designations are:

- industrial land;
- business park;
- Airport Employment Growth District (AEGD); and
- shipping and navigation.

These designations recognize a range of employment and provide policy direction on function, permitted uses, and general provisions.

In addition to these employment designations, the UHOP also contains employment area policy goals related to developing new strategic employment areas.

The AEGD Secondary Plan provides for a major business park development which integrates with and complements the existing John C. Munro Hamilton International Airport. The Secondary Plan adds 551 net

developable hectares of employment land to the urban boundary and establishes the following employment area designations:

- airport prestige business;
- airport light industrial;
- airside industrial;
- airport related business; and
- airport reserve.

Designations provide for a wide range of employment, airport-related employment, and limited agricultural uses. Office space is limited within the AEGD to support the Downtown Urban Growth Centre as the pre-eminent centre in Hamilton for commercial and office development.

5.1.8 City of Toronto

The City of Toronto's Official Plan identifies Employment Districts as areas where the employment area land use designations apply.

Parcel and development flexibility is recognized as a key component of employment areas in order to accommodate and respond to changing employment needs of a global economy.

The City's Official Plan promotes a range of parcel and building sizes, locations, and permitted uses, complemented by a mix of supportive accessory retail and services.

Protecting employment areas from adjacent sensitive uses is also a priority. Appropriate buffering and separation is needed to ensure that employment uses can operate and function at full capacity without restriction.

The City's Official Plan also establishes core employment areas and general employment areas.

Core employment areas are geographically located within the interior of employment areas, whereas general employment areas tend to be situated at the periphery of employment areas and along major roads.

Core employment areas are intended to protect core employment uses such as industrial manufacturing, warehousing and transportation facilities from potential limitations caused by encroaching sensitive land uses.

General employment uses, such as retail and service uses, are intended to serve as a gradual transition buffer between core employment areas and non-employment uses.

5.1.9 City of Windsor

The City of Windsor's Official Plan identifies six employment land use designations: Business Park, waterfront port, commercial centre, commercial corridor, future employment area, and industrial.

The primary clusters of employment areas are in close proximity surrounding the Windsor International Airport, the Highway 401 corridor, rail corridors, and waterfront industrial ports.

The City's Official Plan identifies higher order corridors as strategic employment areas. Specifically, section 6.4.2.8 recognizes the Highway 401 corridor for its visibility along an international gateway and requires a high standard of architectural and landscape design for adjacent industrial and business park designations.

The City further identifies future employment areas immediately adjacent to the airport and in proximity to Highway 401 corridor. These areas are to be protected for future employment areas and may not be converted to non-employment uses.

Similar to Niagara, Windsor is also recognized by the Federal government as a Foreign Trade Zone Point. Windsor has a dedicated Economic Development Corporation that provides a one-stop shop for information on Foreign Trade Zone Point policies and programs.

5.1.10 City of Sarnia

The City of Sarnia is located along the Canada-US border, across from Port Huron, Michigan.

The City has a cluster of chemical, petrochemical and refinery-related employers along the St. Clair River, as well as two highway corridor zones — Highway 402 and Highway 40 — identified within the City's Official Plan for employment-related development.

Section 4.7 of the City's Official Plan contains policies related to employment areas and identifies three employment designations:

- heavy industrial;
- light industrial; and
- business park.

The City's Official Plan provides provisions for all employment designations to have access to goods movement facilities.

In particular, policy 4.7.2.4 emphasizes railway access in heavy industrial areas and encourages spur line railway track facilities to expand within this designation. Further, proponents of new development must demonstrate that the development will not preclude future extension and installation of spur lines.

5.2 Criteria for employment areas

A cross jurisdictional review of upper- and single-tier municipalities in Southern Ontario reveals that, in general, employment areas in the GGH are defined by six criteria:

1. CLOSE PROXIMITY TO MAJOR INFRASTRUCTURE

- Located adjacent to or in close proximity to major goods movement facilities and corridors such as airports, provincial highways, rail corridors, higher order transit, ports and border crossings.
- Located in close proximity to key utilities infrastructure such as water, wastewater, hydro, natural gas, and fiber to facilitate quick development and construction of new buildings.

2. ACCESS TO INTER-REGIONAL ECONOMIC MARKETS

- Contain clusters of employment uses that serve a provincial, national or international market.
- Federal and Provincial designations highlight the importance of international trade — specifically the Federally designated Foreign Trade Zone Point and Provincially recognized Gateway Economic Centre and Gateway Economic Zone.

3. LARGE LAND AREAS WITH FLEXIBILITY FOR LAND DEVELOPMENT

- Availability of large, unconstrained, continuous blocks / parcels of land.
- Opportunities to provide a range of sites and uses in terms of size, price, and ownership options.
- Ability to respond to evolving employment needs through flexible functional space.

4. SIGNIFICANT SCALE AND CLUSTER OF EMPLOYMENT ACTIVITY

- Ability to accommodate and support a critical mass of employees, floor space, and total production output.
- Located in close proximity to similar employers, industries, and supply chains.
- Access to skilled trades / labour force.

5. RECOGNITION AND PROTECTION WITHIN LAND USE PLANNING

- Support from municipalities to overcome barriers, facilitate development and investment opportunities, and protect for long-term employment use.
- Protection through official plan policies and zoning by-laws from the encroachment of non-employment and other sensitive land uses.
- Demonstrated need to convert employment to non-employment uses.

6. LOCATIONAL AND FINANCIAL COMPETITIVENESS

- Eligibility for financial incentives (e.g. availability of tax incentives, land contribution).
- Expedited development application processes.
- Amenities and costs of living that contribute to high-quality lifestyles for employees and families.

6.0 ASSESSMENT OF NIAGARA'S EMPLOYMENT AREAS

An assessment of the Region's employment areas, as found in Appendix D, shows both similarities and differences to employment areas identified in other upper- and single-tier municipalities in the GGH. Key observations from the comparative assessment are provided below.

Large supply of vacant employment land

Many GGH municipalities are nearing full build-out of their urban area boundaries and are experiencing growth pressures on designated greenfield areas. This is not the case for Niagara, as the Region has a large supply of vacant residential lands in addition to a significant supply of vacant employment land.

However, the Region's vacant employment land stock does not necessarily mean that employers will develop them. Often, these vacant parcels are constrained by environmental features or lack proper municipal servicing. Parcels can be expensive to service, potentially deterring prospective employers ready to develop.

There is opportunity for the Region to leverage its large supply of vacant employment land by demonstrating investment readiness through removing barriers and risks to development (i.e. equipping parcels with connections to municipal services).

Similar land use permissions

The majority of GGH municipalities share similar employment designations and permissions for industrial areas and business park areas.

Generally, higher concentrations of office uses are directed to core areas, downtowns, and corridors along 400 series highways. This is similar to Niagara — specifically the St. Catharines Urban Growth Centre — where the majority of office-related employment use is directed.

Risk of conversion to non-employment uses

Many GGH municipalities are experiencing a regeneration of employment areas towards mixed-use development. This trend has been a result of increasing land values, residential market demand, and encroaching non-employment uses.

Although Niagara's employment areas have yet to experience these same growth pressures, there are instances where there is risk for conversion of employment uses within employment areas to non-employment uses.

Specifically, this is more likely to occur in Major Transit Station Areas where communities are transitioning from low density residential and traditional employment uses to higher density mixed-use development. For these areas, there is opportunity to intensify and accommodate office and other more-compact employment uses that are more compatible with sensitive land uses.

Opportunity to identify future employment areas

The ROP recognizes the Gateway Economic Zone and Gateway Economic Centre as an important corridor for economic development and international trade with the United States.

There is opportunity to recognize the QEW Corridor as a future employment area capable of supporting employment growth beyond the 2041 planning horizon. This Corridor offers superb access to regional highway infrastructure and direct access to multiple international border crossings in both Niagara Falls and Fort Erie.

This approach would align the Region with other policy approaches across the GGH, as in Halton Region for example, while providing the necessary policy framework to ensure Niagara has an adequate supply of protected employment lands that can support future employment growth and respond to changing market demands and employment typologies.

Several GGH municipalities have employment provisions for lands within and adjacent to airports. Currently, the Region does not identify employment areas for its airports (i.e. Niagara District Airport, Niagara Central Dorothy Rungeling Airport).

There is opportunity for additional Regional policy to protect lands within and adjacent to airports for clusters of economic activities, employment, and associated supportive uses.

Opportunity to designate provincially significant employment zones

The Province currently does not designate any PSEZs in Niagara.

Niagara's unique characteristics including proximity to major goods movement facilities and corridors, direct access to five international border crossings with the United States, a Federally designated Foreign Trade Zone Point, and Provincially recognized Gateway Economic Zone and Gateway Economic Centre should be factored when determining which employment areas may qualify as a PSEZ.

The Region should continue consulting with the Province and its local municipalities to explore the potential of designating certain employment areas as PSEZs.

7.0 STAKEHOLDER ENGAGEMENT

As part of the research for the Strategy, two workshops were held in October 2019 with municipal planners and industry stakeholders.

The purpose of these workshops was to share the preliminary assessment of the Region's employment areas and gather feedback related to employment land planning and development to inform policy recommendations.

Workshop materials are included in **Appendix E**, with summaries of feedback received during both workshops included in **Appendix F**.

Discussed below are general feedback themes considered during the formulation of the Strategy.

Niagara has advantageous locational and infrastructure amenities that are attractive to employers

Participants indicated that Niagara offers excellent amenities that make it an attractive area for employment. Connections to major goods movement facilities and corridors such as the Provincial highways, Canada-United States border crossings, and the Welland Canal were identified as strategic opportunities to leverage economic development.

Future employment areas need to have a strong vision and promote best planning practices

Participants emphasized the importance of having vision for the future of employment lands and the need to harmonize employment with affordable and transit-supportive housing, and low impact development practices for climate resiliency.

Additionally, participants noted that during the identification of future employment areas, these areas should not have to meet all employment area criteria. For example, the area may not be serviced yet; however, has the potential to be serviced.

Municipal processing and timelines for employment-related development applications is burdensome

Participants highlighted that the processing and timelines associated to employment-related development applications is longer and more burdensome than to non-employment applications.

Currently, lengthy employment development processes result in increased development costs and uncertainty with attracting tenants. Concern was also expressed in regards to whether a PSEZ designation would influence the development application process.

The importance of protecting employment from conversion to non-employment uses was also highlighted to ensure the Region's economic well-being and viability for both new and existing employers.

Servicing and infrastructure constraints were also identified as barriers to employment-related development. Some of the Region's employment areas are not municipally serviced, impeding the development process and limiting viability of employment lands. Feedback recommended that the Region create a clear short- and long-term vision for its employment areas.

Employment areas must be flexible to accommodate evolving employment trends and practices

Participants highlighted the changing nature of employment towards more flexible work arrangements.

This trend relates to the increasing number of small and medium-sized firms engaged in innovation and development in the Region, who have a specific set of workplace needs.

Participants suggested that the Region's approach to employment area planning should incorporate elements of flexibility, where appropriate, and recognize that in certain cases non-employment uses can exist in harmony with employment uses.

The introduction of employment-supportive uses should be context-sensitive to ensure compatibility with existing and planned employment uses.

Institutional infrastructure should be permitted within employment areas

Participants identified opportunity for the Region to expand its human capital of young professionals and educated population with knowledge-based jobs.

Participant feedback suggested that knowledge-based employment should be located close to residential communities in order to attract and retain growth.

Further, it was suggested that the Region explore expanding its permitted uses in employment areas to include institutional infrastructure, such as post-secondary institutions, health care centres, and government facilities. These types of facilities offer knowledge-based job opportunities and can be developed with transit-supportive densities.

Participants encouraged the Region to continue working with local municipal partners to improve population-services such as public transit, social, and community amenities to maintain Niagara as a great place to live and work.

Access to a diverse human capital is critical to attracting employers

Human capital (i.e. skilled labour force) was highlighted as a large contributing factor to the attractiveness of Niagara as a place for prospective employers. Further, permitting and supporting institutional infrastructure such as post-secondary institutions and health care centres was recommended for inclusion into employment areas.

Parcels within employment areas must be shovel-ready

Participants expressed a desire for municipalities to identify and remove encumbrances to employment parcels.

Parcels should be equipped with municipal servicing connections and have accurate mapping of on-site constraints, including natural heritage features and soil conditions.

Participants recommended that municipalities reduce the risks of development as much as possible to enable a rapid response to prospective employers and changes in market demand.

Municipal employment conversion criteria should distinguish clear eligibilities and protections

Participants noted that municipal development conversion criteria should differentiate significance between Provincial, Regional, and local employment uses.

Some recommended that criteria should contain stronger restrictions to convert within PSEZs and future employment areas, with lesser restrictions for employment areas and employment lands.

It was also suggested that the ability to convert employment parcels within employment areas be relative to the site-specific considerations used for their inclusion within the area.

8.0 DRAFT

RECOMMENDATIONS AND STRATEGIC POLICY DIRECTION

The following section outlines a draft policy framework based on the study analysis and findings for consideration to be integrated into the Region's ROP.

These recommendations are based on:

- The assessment of the Region's current employment areas;
- A review of municipal planning practices across the GGH, including the development of identification criteria for strategic employment areas and corridors;
- Municipal staff and industry stakeholder input; and,
- Recent approved and proposed Provincial land use policy changes and the current Provincial and Regional planning framework.

Employment areas

Employment areas should be identified and protected for large employment generators and land-extensive employment uses. These areas are intended to support large-scale industrial uses and prestige businesses including major business headquarters and offices.

Access to major goods movement facilities and corridors should be prioritized, along with proximity and access to international border crossings and inter-regional trade corridors.

Employment areas should be incorporated into the ROP by way of a Schedule that identifies the boundaries of each area.

Supportive policy language should also be provided to highlight the goals and objectives for these areas, as well as how they are to be addressed in advance of or during the Region's next MCR.

Employment lands

Employment lands are intended to support smaller employment uses and clusters. Employment lands outside of employment areas will predominantly continue as local employment centres or single parcels that possess a particular employment use (e.g. automobile-related services).

The Region should continue to collaborate with local municipalities to refine employment land policies for lands outside of employment areas.

Permitting employment-supportive uses in employment areas

The Region should consider including provisions within the new ROP for employment land and employment area policies that permit for employment-supportive uses in certain areas.

The intent is to permit clusters of employment-supportive uses at intersections, gateway locations, or transitional areas to enhance the locational attributes and competitiveness of mixed-use urban employment areas.

Consider identifying and protecting future employment areas

In planning beyond the 2041 horizon, it is important that the Region also proactively identify and protect future employment areas through the ROP. Future employment areas protect lands that can accommodate future employment uses in strategic locations based on the “criteria for employment areas” listed in section 5.2 of this Strategy.

Based on the common characteristics of employment areas within the GGH, it is recommended that a future employment area(s) be identified within municipalities that have an airport or have the Provincial Gateway Economic Zone and Gateway Economic Centre designation, as these represent the greatest opportunities for long-term employment growth and investment.

Future employment areas policies in the new ROP should:

- Prohibit the conversion of employment lands within future employment areas to non-employment uses.
- Direct local municipalities to include provisions in official plans and zoning by-laws that protect employment land within future employment areas.
- Require any identified potential future employment areas be considered through the Region’s MCR process.

The identification of a future employment area should require the delineation of exact boundaries and creation of a concept plan for the area.

Concept plans should contain analysis that examines environmental systems and features, existing and planned municipal servicing, and transportation infrastructure that will affect future employment-related development within the strategic employment area.

Future employment areas should be continuously assessed and monitored to determine whether they need to be protected for future employment uses.

Opportunity to plan for intensified employment uses

There is opportunity to grow office and knowledge-based employment in Niagara.

The Region should consider identifying locations for higher employment densities in the form of major office developments with permitted employment-supportive uses. Locations should be in close proximity to higher order transit and retrofit existing building stock where possible.

While it may take a significant amount of time before higher density employment materializes, the Region and its local municipalities should protect opportunities for higher density employment from lower density uses.

The Region's new ROP should specify employment targets for each identified employment area, excluding future employment areas.

Establish minimum density targets for employment areas

The Region, in consultation with local municipalities, are required to establish minimum density targets for each Employment Area. Densities are to reflect the current and anticipated type and scale of employment that characterizes the employment area to which the target applies.

Identification of minimum densities targets will assist in directing employment growth and development to locations most suitable based on employment type.

Opportunity to identify provincially significant employment zones

The Region, in consultation with local municipalities, should continue to consult with the Province to identify PSEZs in Niagara, if any.

The PSEZ designation provides the strongest restrictions in regards to converting employment to non-employment uses.

The Region and its local municipalities should work together to create criteria that clearly distinguishes eligibility for all lands – regardless of their designation for employment or non-employment uses – that would qualify for consideration towards becoming recognized as a PSEZ.

Availability of connections to servicing and infrastructure

Prospective employers seek sites that offer a predictable, low-risk development application approvals process and can be developed in a timely manner.

Available connections to municipal servicing and infrastructure should improve the overall marketability of vacant employment area parcels.

The Region and its local municipalities must work together to prioritize efforts to ensure that employment areas are equipped with municipal servicing, utilities, and convenient access to major goods movement facilities and infrastructure.

These efforts should enhance investor confidence through offering a degree of certainty in regards to expectations of when existing un-serviced vacant parcels can be developed.

9.0 CONCLUSIONS

This Strategy provides the context, supporting background information and analysis to develop objectives and a policy framework for Niagara's new ROP.

Recommendations in this Strategy are based upon a comprehensive assessment of the Region's employment areas in respect of existing physical characteristics and socio-economic market conditions that define employment areas across the GGH, as well as municipal and stakeholder input

In reviewing the Region's employment areas, it was revealed that a large diversity exists with respect to employment area location, size, configuration and economic output.

Overall, the Region's employment areas are easily accessible to major goods movement facilities and corridors. Further, the Region's close proximity to the Canada-United States border, Federal designation as a Foreign Trade Zone Point, and Provincial recognized Gateway Economic Zone and Gateway Economic Centre enhances its competitive edge to attract prospective employers.

However, several of the Region's employment areas are constrained by barriers to development. These constraints include parcels that are small, irregular in size; parcel fragmentation due to the presence of natural environmental features; an absence of municipal servicing / utility connections; and, existing land use compatibility issues with adjacent non-employment uses.

Using the common criteria of employment areas in the GGH, assessment of the Region's employment areas and recommendations of this Strategy, employment areas will be further refined (conversions and expansions) for input into the new ROP.

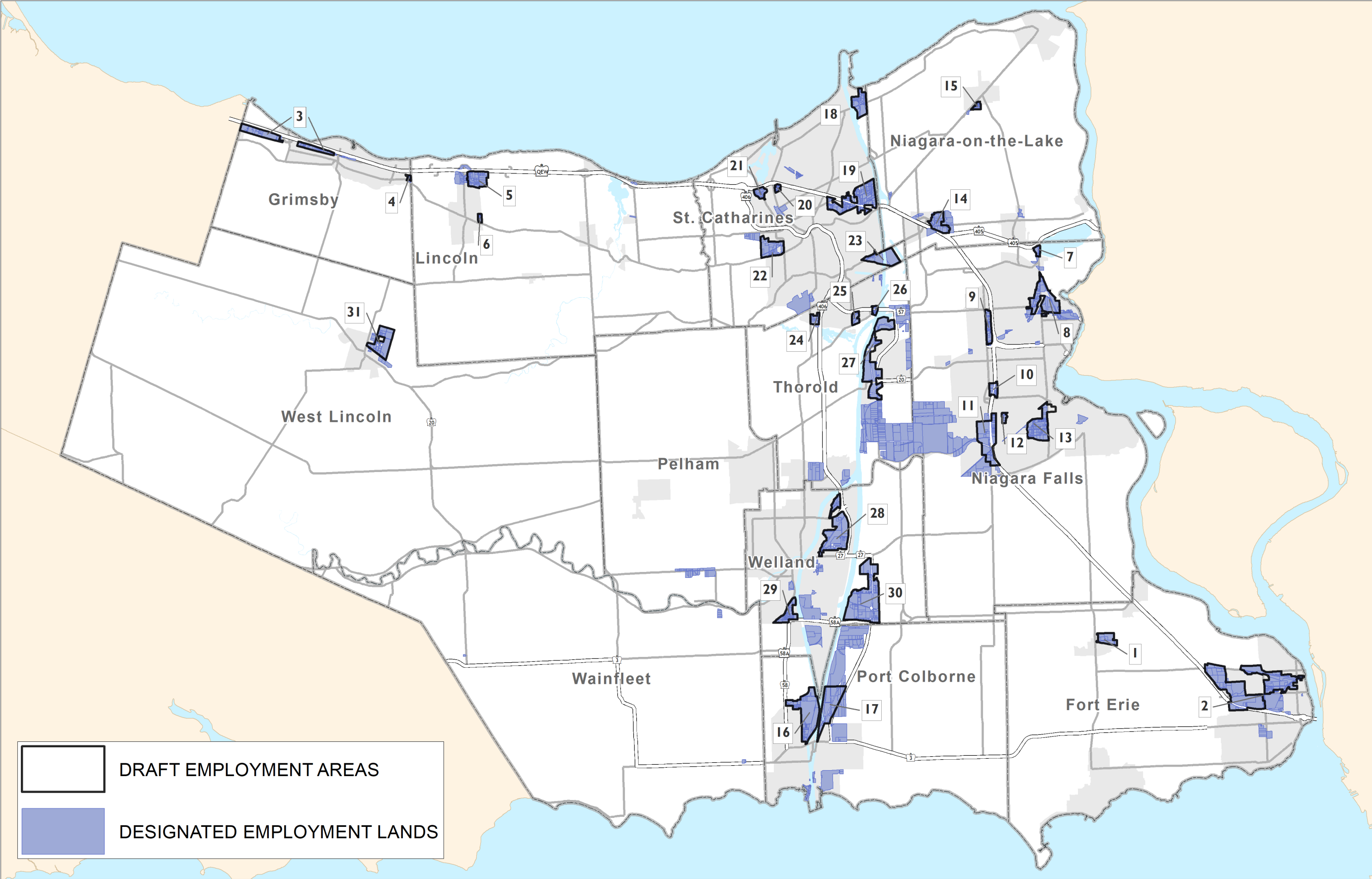
Draft recommendations of this Strategy include general policy direction that the Region should consider when drafting employment area policies for the new ROP.

The recommendations of this Strategy should be further refined through consultation between the Region and its local municipalities.

Appendix A

Niagara Region employment lands and employment areas

Appendix A: Niagara Region's employment lands and employment areas



Appendix B

Physical and market review of Niagara Region's employment areas

Appendix B: Physical and market review of Niagara’s employment areas (refer to Appendix A for employment area mapping)

Identification		Physical Context				Policy Context and Classification				Qualitative Assessment	
Map # / Code	Employment Area	Location and Gross Developable Area (GDA)	Physical Characteristics	Building/Development Characteristics	Access and Infrastructure	Policy Classification	Industrial Area Attributes	Business Park Attributes	Other Attributes	Strengths/Opportunities	Weaknesses/Constraints
			Lot sizes Topography Environmental Constraints	Building stock, sizes, age of buildings, employment density	Serviced Highway Access Other access (rail, water, airport); Planned capital projects	Land Use Designation in Local Area Official Plan	Access Transportation and Infrastructure Critical mass Parcel size Land use compatibility Market choices	Access Critical mass Minimal buffers Land use compatibility Employment supportive uses Concentration of like industries/sectors	Access to labour, transit, institutions, mix of uses, financial incentives		
(1) Fort Erie	Stevensville Industrial Park	<ul style="list-style-type: none">Close proximity to Stevensville Road (Regional Road)42.49 ha GDA	<ul style="list-style-type: none">Range of parcel sizes from 1-16 hectares to accommodate different employment usesRelatively small employment area with <10 parcels available for developmentSignificant environmental constraints northwestern portion	<ul style="list-style-type: none"><10 buildings located within employment areaRange in building footprint from approx. 500 m² to 13,500m²Employment density of 12 jobs per hectare	<ul style="list-style-type: none">Employment area is servicedRail corridor located to south of employment areaLocated approx. 3 kilometres from closest highway interchange (Netherby Road and QEW)	<ul style="list-style-type: none">Industrial	<ul style="list-style-type: none">Transportation and Infrastructure (rail and regional roads)Parcel size (small and large-scale facilities)Location (2 access points from adjacent roads)Market choice (small and large parcels)Land use compatibility	<ul style="list-style-type: none">Access (QEW)	<ul style="list-style-type: none">Located in strategic location for investment (Gateway CIP)	<ul style="list-style-type: none">Potential for rail access along southern portion of employment area	<ul style="list-style-type: none">Entire employment area lacks direct access/exposure to QEW (approx. 3 kilometres to Netherby Road interchange)Relatively isolated from other amenities and urban areasSmall size of employment area cannot accommodate significant scale of employment uses
(2) Fort Erie	Fort Erie Industrial Park	<ul style="list-style-type: none">Close proximity to Canada/US border crossing at Peace Bridge332.00 GDA	<ul style="list-style-type: none">Significant environmental constraints (designated as environmental conservation/ protection) located throughout employment areaSensitive land uses such as urban residential in close proximity to northern and portions of employment areaParcels are fragmented and/or irregularly shapedAverage parcel size of approx. 3.1 hectares	<ul style="list-style-type: none">Variety of land sizes/parcel sizesSignificant portions of vacant employment, especially in the northern portion (approx. 190 hectares)Employment density of 9 jobs per hectareCompetitive land prices	<ul style="list-style-type: none">Close proximity to Peace Bridge international border crossing (approx. 3 kilometres)Direct access/exposure to QEW (Gilmore, Thompson, Bowen interchanges)Direct access/potential for expanded rail access along northern portion of employment areaEmployment Area fully or partially serviced; no upgrades to Regional water/sanitary services anticipated	<ul style="list-style-type: none">Industrial	<ul style="list-style-type: none">Access (QEW)Transportation and Infrastructure (highway, rail)Critical mass (~300 ha)Parcel size (small and large-scale facilities)Location (multiple access points from regional/provincial highways)Market choice (small and large parcels)	<ul style="list-style-type: none">Access (QEW)Critical mass	<ul style="list-style-type: none">Located in strategic location for investment (Gateway CIP)	<ul style="list-style-type: none">Very close proximity to Canada/US border (less than 5 km) presents opportunities for cross-border tradeWell connected by transportation infrastructure; opportunities for enhanced connectivity with local road improvements; allows for specialized transportation needsCapitalizes on opportunity for advanced manufacturing, transportation/warehouse using, logistics industries	<ul style="list-style-type: none">Fragmented nature of parcels may limit potential of employment uses/create difficulty in attracting desired end usersEmployment lands within the Employment Area are separated from one another by wetlands/significant woodlots
(3) Grimsby	Grimsby West QEW Employment Area	<ul style="list-style-type: none">Location in western portion of Niagara Region provides closest proximity to GGH/rest of OntarioClose proximity to Provincially Significant Employment Zone #25 (Hamilton Portlands)109.10 ha GDA	<ul style="list-style-type: none">Large range in parcel size from 0.3-29 hectares able to accommodate range of employment usesRelatively high employment density of 31 jobs per hectare	<ul style="list-style-type: none">Building stock construction year rages from 1972 to 2015; median 1988Median rentable building area: 47,577 m² (western portion); 21,580 m² (eastern portion)Built form is generally low-rise, 1-2 storeys; warehouse-style buildings; typical range in building footprints from 900 m² to 33,000 m²Relatively high employment density of 43 jobs per hectare	<ul style="list-style-type: none">Fully serviced land; majority of vacant land is serviced by municipal infrastructureDirect access and exposure to QEW (direct exposure to highway corridor along South Service Road)Several capital projects/infrastructure improvements planned in the area including major and minor streetscape improvements along South Service Road and Industrial Drive	<ul style="list-style-type: none">Employment AreaEmployment Area – Office (Grimsby GO Secondary Plan)	<ul style="list-style-type: none">Access (QEW)Transportation and infrastructure (highway, rail)Parcel size (small and large-scale facilities)Location (multiple access points from local roads/provincial highways)	<ul style="list-style-type: none">Access (QEW)Minimal land use buffersCharacter (streetscapes, landscaping)	<ul style="list-style-type: none">Close proximity to planned Grimsby GO stationAccess to labour forces from both Niagara Region and Hamilton/Halton Region	<ul style="list-style-type: none">Direct access/high visibility along QEW and close location to the GTHA is unique feature amongst other Employment Areas; opportunity to capitalize on close proximity to GTHAClose proximity to proposed Grimsby GO station, with major street/public realm improvements planned along South Service Road; opportunity to attract prestige businesses to the area	<ul style="list-style-type: none">Parcels are limited by hard boundaries including QEW to the north and rail corridor to the south; employment area is relatively narrow and has an average width of approx. 150 metresSurrounding non-compatible land uses (e.g. residential/commercial) constrain expansion of Employment Area and may limit full viability of certain employment usesLimited land supply presents challenge for future intensification
(4) Grimsby	Grimsby East QEW Employment Area	<ul style="list-style-type: none">Located in close proximity to QEW (within 2-3 kilometres)Location in western portion of Niagara Region provides closer	<ul style="list-style-type: none">Minimal environmental constraints/limitationsGenerally flat topographyAbutted by agricultural, residential (low/medium density),	<ul style="list-style-type: none">Relatively high employment density of 51 jobs per hectareMajority of parcels are vacant and open for development	<ul style="list-style-type: none">Fully serviced land; majority of vacant land is serviced by municipal infrastructureDirect access and exposure to QEW (direct exposure to highway	<ul style="list-style-type: none">Employment Area	<ul style="list-style-type: none">Access (QEW)	<ul style="list-style-type: none">Access (QEW)Minimal land use buffersEmployment-supportive uses (transition between	<ul style="list-style-type: none">Access to labour forces from both Niagara Region and Hamilton/Halton Region	<ul style="list-style-type: none">Direct access/high visibility along QEW and close location to the GTHA is unique feature amongst other Employment Areas; opportunity to	<ul style="list-style-type: none">Relatively small employment area with approx. 10 parcels available for development

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			Lot sizes Topography Environmental Constraints	Building stock, sizes, age of buildings, employment density	Serviced Highway Access Other access (rail, water, airport); Planned capital projects	Land Use Designation in Local Area Official Plan	Access Transportation and Infrastructure Critical mass Parcel size Land use compatibility Market choices	Access Critical mass Minimal buffers Land use compatibility Employment supportive uses Concentration of like industries/sectors	Access to labour, transit, institutions, mix of uses, financial incentives		
		proximity to GGH/rest of Ontario <ul style="list-style-type: none">6.22 ha GDA	commercial and institutional land uses (Niagara West YMCA)	<ul style="list-style-type: none">Building footprint average approx. 900 m²	corridor along South Service Road) <ul style="list-style-type: none">Rail corridor bi-sects Employment Area; opportunity for access/expanded access to corridor			commercial/residential uses)		capitalize on close proximity to GTHA	<ul style="list-style-type: none">Limited exposure/visibility from highwayIn close proximity to sensitive land uses to the south and west (residential uses/institutional uses such as Niagara West YMCA)
(5) Lincoln	Beamsville QEW Industrial Park	<ul style="list-style-type: none">Close proximity to Ontario Street (regional road)Strategic location as a "gateway" to Town of Lincoln from the QEW74.78 ha GDA	<ul style="list-style-type: none">Number of environmental constraints located along eastern portion of Employment Area and throughout interior (e.g. significant woodlots)Range in parcel sizes and layout from 0.3-4 hectares, but parcels are still relatively small	<ul style="list-style-type: none">Relatively high employment density at 29 jobs per hectareApprox. 45% of parcels are vacant and available for developmentRange in building footprint sizes from 400 m² to 23,000 m²Built form typically low-rise, 1-storey warehousing buildings with significant portions of outdoor storage	<ul style="list-style-type: none">Features direct access from QEW (via Ontario Street interchange)Number of properties along south portion of QEW have direct exposure/significant highway visibilityClose proximity to rail corridor/opportunities for expanded access to railMajority of vacant parcels are serviced (approx. 72%)	<ul style="list-style-type: none">IndustrialBeamsville GO Transit Station Secondary Plan	<ul style="list-style-type: none">Access (QEW)Location (3 access points)Critical massLand use compatibilityParcel sizes (small and mid-size facilities)Market choice (range in parcel sizes)	<ul style="list-style-type: none">Access (QEW)Land use compatibilityEmployment-supportive uses (agricultural uses)	<ul style="list-style-type: none">Located east of a future potential GO Station site	<ul style="list-style-type: none">Direct access/exposure to QEWPotential for rail access along southern portion of employment areaClose proximity to proposed Grimsby Go StationClose proximity to existing agricultural uses presents opportunities to support value added/ancillary uses in agri-business and food processing sectors	<ul style="list-style-type: none">Portions of employment area limited by environmental constraintsLimited supply of available land presents challenge for large-scale development/employment uses
(6) Lincoln	Lincoln King Street/Bartlett Road Employment Area	<ul style="list-style-type: none">Relatively small employment area (<10 employment parcels available for development)9.06 ha GDA	<ul style="list-style-type: none">Relatively small parcel sizes ranging from 0.3-2.5 hectaresNo major environmental constraints identified within Employment Area; stream and wooded area located along western edge of Employment Area	<ul style="list-style-type: none">Employment density of 8 jobs per hectareBuilt form characterized by low-rise, 1 storey warehouse-type buildingsBuilding footprints range from approx. 700 m² to 2,500 m²	<ul style="list-style-type: none">Located along regional road (Bartlett Avenue)Located approx. 3.5 kilometres south of nearest highway interchange (Ontario Street); no direct access via regional road	<ul style="list-style-type: none">Industrial	<ul style="list-style-type: none">Parcel size (small and mid-size facilities)	<ul style="list-style-type: none">Minimal land use buffers	<ul style="list-style-type: none">n/a	<ul style="list-style-type: none">Close proximity to Beamsville urban centre provides additional amenities to employment usesProximity to agricultural-related uses presents opportunity to capitalize on agri-business, food processing and culinary related employment uses	<ul style="list-style-type: none">No direct access to QEW (approx. 3.5 kilometres to closest interchange at Ontario Street)Non-compatible land uses to north, west and south (residential, environmental, institutional) may limit viability of certain employment usesSmall size of Employment Area/limited number of parcels limits opportunity to sustain critical mass of employment
(7) Niagara Falls	Niagara Falls Highway 405 Employment Area	<ul style="list-style-type: none">Located along urban boundary – expansion may require 2-3 years through MCR processLocated near Queenston/Lewiston border crossing914.67 ha GDA	<ul style="list-style-type: none">Range in parcel size from 0.5 - 7.5 hectares (although still relatively small parcel sizes overall)	<ul style="list-style-type: none">Relatively low employment density 8 jobs per hectare)Building typology defined by low-rise, 1 storey warehousing buildings; significant presence of outdoor storage facilities	<ul style="list-style-type: none">Close proximity to Highway 405 via Stanley Avenue (but relatively poor exposure/visibility)Fully serviced Employment AreaVery close proximity to Queenston international border crossing (approx. 3.5 kilometres)	<ul style="list-style-type: none">Industrial	<ul style="list-style-type: none">Access (Hwy 405)Transportation and infrastructureParcel size (small to large scale facilities)Land use compatibilityMarket choice (small and large parcels)	<ul style="list-style-type: none">Access (Hwy 405)	<ul style="list-style-type: none">Located in strategic location for investment (Gateway CIP)	<ul style="list-style-type: none">Close proximity to Queenston international border crossing (approx. 3.5 kilometres) presents opportunity to capitalize on cross-border trade/logistics employment usesGood connectivity via 400-series highway is an attractive attribute to a range of employment uses	<ul style="list-style-type: none">Located along urban boundary – expansion may require 2-3 years through MCR processRelatively small size of Employment Area limits potential to support critical mass of employment uses

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(8) Niagara Falls	North Niagara Falls Secure Storage Employment Area	<ul style="list-style-type: none">Located in close proximity to Whirlpool Bridge border crossing172.89 ha GDA	<ul style="list-style-type: none">Range in parcel sizes from 0.4 to 15.5 hectaresLimited environmental constraints	<ul style="list-style-type: none">Competitive land pricesEmployment density of approx. 11 jobs per hectareSignificant portions of vacant employment land (esp. within eastern portion of Employment Area)	<ul style="list-style-type: none">Close proximity to international rail crossing at Whirlpool rail bridgeClose proximity to Queenston (approx. 6 kilometres) and Rainbow International Bridge (approx. 4.5 kilometres)Potential for rail access throughout Employment AreaAccess to 400 series highwayAccess to full municipal servicesSeveral capital infrastructure improvements planned in the immediate area	<ul style="list-style-type: none">Industrial with portions under Special Policy Area 62Industrial with portions under Special Policy Area 62	<ul style="list-style-type: none">Transportation and infrastructure (international rail crossings)Parcel sizes (small to large scale facilities)Market choice (range in size and shape of parcels)Critical massLocation (multiple access points)	<ul style="list-style-type: none">n/a	<ul style="list-style-type: none">Located in strategic location for investment (Gateway CIP)	<ul style="list-style-type: none">Close proximity to Whirlpool international border crossing (approx. 3.5 kilometres) presents opportunity to capitalize on cross-border trade/logistics employment usesProximity to border crossing and rail access presents opportunity for specialized employment uses including secure storage of cross-border goods; Whirlpool bridge limited to rail traffic and NEXUS cardholders; opportunity for development of rail-based goods storage facilities	<ul style="list-style-type: none">Fragmented/irregular land patterns and shape of parcels may present issues in attracting certain employment uses/optimizing employment lands
(9) Niagara Falls	Niagara Falls QEW/420 Employment Area	<ul style="list-style-type: none">Centrally located in City of Niagara Falls, in close proximity to both QEW and Highway 42053.28 ha GDA	<ul style="list-style-type: none">Surrounded by sensitive land uses in close proximity to the west of employment area (residential)Range in lot sizes from 0.2 to 3.5 hectares	<ul style="list-style-type: none">Built form characterized by low-rise 1-storey warehousing buildingsSignificant portions of outdoor storage throughout Employment AreaEmployment density of approx. 25 jobs per hectare	<ul style="list-style-type: none">Direct access/exposure to QEW; close proximity to Highway 420Close proximity to Rainbow international bridgePotential for rail access along southern portion of employment area	<ul style="list-style-type: none">Industrial	<ul style="list-style-type: none">Access (QEW)Parcel sizes (supports small to mid-size facilities)Market choice (range in parcel sizes)	<ul style="list-style-type: none">Access (QEW)Minimal land use buffers	<ul style="list-style-type: none">Located in strategic location for investment (Gateway CIP)	<ul style="list-style-type: none">Close proximity to international border crossings presents opportunity to capitalize on cross-border trade/logistics employment usesAdequate buffering from sensitive land uses (e.g. residential) presents opportunity to support employment uses that require more stringent land use compatibility	<ul style="list-style-type: none">Limited size of Employment Area/constraints of adjacent non-compatible land uses limits ability to support critical mass of employment uses
(10) Niagara Falls	Niagara Falls QEW Centre Employment Area	<ul style="list-style-type: none">Centrally located in City of Niagara Falls, in close proximity to QEW24.56 ha GDA	<ul style="list-style-type: none">Range in lot sizes from 0.2 to 2.7 hectares	<ul style="list-style-type: none">Supports relatively high employment density (51 jobs per hectare)Built form characterized by low-rise 1-2 storey warehousing and storage buildings, office/industrial buildings	<ul style="list-style-type: none">Direct access/exposure to QEWClose proximity to international border crossings	<ul style="list-style-type: none">Industrial	<ul style="list-style-type: none">Access (QEW)Land use compatibilityLocation (dedicated access points separated from non-employment uses)Parcel sizes (supports small to mid-size facilities)Market choice (rectangular lots to support range of uses)	<ul style="list-style-type: none">Access (QEW)	<ul style="list-style-type: none">Located in strategic location for investment (Gateway CIP)	<ul style="list-style-type: none">Close proximity to international border crossings presents opportunity to capitalize on cross-border trade/logistics employment uses	<ul style="list-style-type: none">Relatively small employment area (bounded by Hydro Canal to the east and Kinsman Court to the west (only one parcel deep on either side of highway, approx. depth of 150 metres); limited potential to support critical mass of employment usesMany non-compatible uses (e.g. retirement centre, recreational uses) located throughout Employment Area limited viability of employment operations
(11) Niagara Falls	Niagara Falls QEW South Employment Area (Grassy Brook Business Park)	<ul style="list-style-type: none">Centrally located in City of Niagara Falls, in close proximity to QEW	<ul style="list-style-type: none">Employment lands located to west of QEW/north and south of Grassy Brook Road	<ul style="list-style-type: none">Built form generally characterized by low-rise 1-2 storey warehousing buildings	<ul style="list-style-type: none">Direct access/exposure to QEW	<ul style="list-style-type: none">Industrial with portions within the Garner South Secondary Plan	<ul style="list-style-type: none">Access (QEW)Critical mass	<ul style="list-style-type: none">Access (QEW)Employment-supportive uses (large retail pads to north of	<ul style="list-style-type: none">Adjacent to future Niagara South Hospital siteLocated in strategic location for	<ul style="list-style-type: none">Direct access to QEW/close proximity to international border crossings and central Niagara Falls	<ul style="list-style-type: none">Significant portions of employment area limited by environmental constraints along

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(11) Niagara Falls		<ul style="list-style-type: none">147.80 ha GDA	are largely undeveloped	<ul style="list-style-type: none">Supports employment density of 17 jobs per hectare	<ul style="list-style-type: none">Close proximity to international border crossings		<ul style="list-style-type: none">Land use compatibilityParcel size (supports small to large-scale facilities)Market choice (range in parcel size)	site; future hospital to south)	investment (Gateway CIP)	<p>presents location-based opportunities for businesses</p> <ul style="list-style-type: none">Close proximity to cluster of tourism-related uses in Niagara FallsOpportunities for office-based tourism activities (e.g. professional office, services, business services); opportunity for large, campus-style developmentProximity to future hospital site provides opportunities to support ancillary health care/medical related employment uses	western/central portion of employment area)
(12) Niagara Falls	Niagara Falls Dorchester Road Employment Area	<ul style="list-style-type: none">Located along Dorchester Road in South Niagara Falls; approx. 2.5 kilometres from closest highway interchange (McLeod Avenue and QEW)10.32 ha GDA	<ul style="list-style-type: none">Bounded by Welland Canal/Hydro River and Significant woodlot/wetlandsTwo parcels are partially covered by wetlandsLot sizes range from 0.3-3.1 hectares	<ul style="list-style-type: none">Built form characterized by low rise 1-2 storey warehouse buildingsSignificant portions of outdoor storage throughout Employment AreaRange in building footprints from approx. 250 m² to 5,900 m²Supports employment density of 43 jobs per hectare	<ul style="list-style-type: none">Potential for rail access along eastern edge of Employment Area	<ul style="list-style-type: none">Industrial	<ul style="list-style-type: none">Land use compatibilityMarket choice (building typology conducive to adaptive reuse)	<ul style="list-style-type: none">Land use compatibility	<ul style="list-style-type: none">Located in strategic location for investment (Gateway CIP)	<ul style="list-style-type: none">Close proximity to multiple international border crossings (Rainbow International Bridge and Peace Bridge) presents opportunity to attract	<ul style="list-style-type: none">Relatively small employment area; <7 parcels available for development/redevelopment; presents challenge in supporting critical mass of employment usesNo direct access/exposure to 400-series highway; relatively isolated from major transportation corridors limits viability to attract higher order employment uses
(13) Niagara Falls	Niagara Falls Stanley Avenue Business Park	<ul style="list-style-type: none">Located in South Niagara Falls, bounded by Chippawa Parkway to the south and Stanley Avenue to the east116.07 ha GDA	<ul style="list-style-type: none">Significant portions of interior of Employment Land covered by Niagara Falls Slough Forest Wetland ComplexLot sizes range from 0.4 to 8.3 hectares in sizeMajority of lots are rectangular in shape; land division pattern throughout Employment Area is attractive for businesses (ability to optimize employment lands)	<ul style="list-style-type: none">Supports employment density of 17 jobs per hectare	<ul style="list-style-type: none">Access to regional road, Stanley Avenue	<ul style="list-style-type: none">Industrial	<ul style="list-style-type: none">Critical massLand use compatibilityParcel size (supports small to large scale facilities)Market choice (parcel configuration supportive of range of employment uses)Location (multiple access points off of Stanley Avenue)	<ul style="list-style-type: none">Land use compatibility (adjacent tourism facilities)	<ul style="list-style-type: none">Located in strategic location for investment (Gateway CIP)	<ul style="list-style-type: none">Approaching significant scale/cluster of employment and uses comparable to other significant employment areas in the GGHAdequately buffered from surrounding sensitive land usesLocated in close proximity to several tourism-related industries in South Niagara Falls; opportunity to support tourism-related business servicesClose proximity to international border crossings (Rainbow International Bridge and Peace Bridge) provides	<ul style="list-style-type: none">Fragmented land parcels along Ramsey Road (very narrow lots with average area of 0.4 hectares)No direct access/exposure to 400-series highway; Area is relative isolated from 400-series highwaysPortions of employment area (especially in the centre and to the northwest) are limited by environmental constraintsAdjacent golf course to be redeveloped for residential uses—may present land use compatibility issues in the future

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										opportunities for cross-border trade	
(14) Niagara-On-The-Lake	Niagara-on-the-Lake Glendale Business Park	<ul style="list-style-type: none">Located in southern NOTL, in close proximity to QEW and district airportLocated adjacent to major retail and commercial uses73.36 ha GDA	<ul style="list-style-type: none">Range in employment land parcel size and size from 0.45 to 13 hectaresRelatively buffered from adjacent sensitive land uses (mainly agricultural uses, open space)Mix of vacant and occupied parcels; approx. 40 hectares of vacant, serviced employment landOnly Employment Area with designated Prestige Industrial land	<ul style="list-style-type: none">Mix of campus style business park buildings ranging from 1-3 storeys and low-rise 1 storey warehouse buildings with open storageSupports employment density of 26 jobs per hectare	<ul style="list-style-type: none">Direct access/exposure to QEW; close proximity to Highway 405Close proximity to Niagara District AirportClose proximity to international border crossings at Queenston, Niagara Falls and Fort ErieContains one of largest amounts of serviced employment land	<ul style="list-style-type: none">Prestige Industrial	<ul style="list-style-type: none">Access (QEW)Parcel sizes (supports medium to large scale employment facilities)Critical massLocation (multiple access points)	<ul style="list-style-type: none">Access (QEW)Transportation and infrastructure (highway and airport)Critical massLand use compatibility (adjacent major retail outlets)	<ul style="list-style-type: none">Proximity to Niagara College	<ul style="list-style-type: none">Opportunity to leverage close proximity to airport for related employment uses; opportunity to attract specialized high-tech/light industrial employment usesStrategic location as gateway node for Town of Niagara-on-the-Lake	<ul style="list-style-type: none">Environmental constraints along western portion of Westwood Court
(15) Niagara-On-The-Lake	Niagara-on-the-Lake Virgil Employment Area	<ul style="list-style-type: none">Located in close proximity to urban centre of Virgil; located within urban area12.83 ha GDA	<ul style="list-style-type: none">Parcel sizes range from 880 m² to 5,100 m² (largest parcel in Employment Area has limited access to Niagara Stone Road)Few vacant employment lands; Employment Area mostly occupied	<ul style="list-style-type: none">Built form characterized by warehousing/manuf acturing building and office buildings with ancillary retailSupports employment density of 31 jobs per hectare	<ul style="list-style-type: none">No existing services on vacant employment land parcelAccess to regional road via Niagara Stone RoadRelatively isolated from 400-series highway (approx. 9.5 kilometres from closest highway interchange)	<ul style="list-style-type: none">General Industrial	<ul style="list-style-type: none">Market choice (parcel configuration supportive of range of small and mid-size uses)	<ul style="list-style-type: none">Minimal land use buffers	<ul style="list-style-type: none">n/a	<ul style="list-style-type: none">Standardized land division pattern (average of 0.3 hectares in size), mostly rectangular/square parcels	<ul style="list-style-type: none">Lack of range of parcel sizes (largest parcel with 5.1 hectares in area has limited access to Niagara Stone Road)Limited access to 400-series highway (located approximately 8 kilometres to closest interchange with QEW at Glendale Avenue)
(16) Port Colborne	Port Colborne West Port Colborne Employment Area	<ul style="list-style-type: none">Located in close proximity to Welland Canal; located west of Canal193.05 ha GDA	<ul style="list-style-type: none">Parcel sizes range from approx. 3600 m² to 892,500 m² (89 ha)Generally topographically uniformMud Lake Conservation Area located to north of Employment Area	<ul style="list-style-type: none">Supports employment density of 8 jobs per hectareBuilt form typically characterized by large building footprints; large warehousing and logistics/storage facilitiesPresence of a major international industrial facilities	<ul style="list-style-type: none">Potential for access to Welland CanalPotential for rail access throughout Employment AreaAccess to provincial highway via Highway 58A	<ul style="list-style-type: none">Industrial and Employment Area	<ul style="list-style-type: none">Access (Highway 58A)Transportation and infrastructure (highway, rail facilities, canal)Critical MassLand use compatibilityParcel size (large range in sizes/ configurations)	<ul style="list-style-type: none">Access (Highway 58A)	<ul style="list-style-type: none">Located in strategic location for investment (Gateway CIP)	<ul style="list-style-type: none">Addition of port infrastructure and facilities along the Canal to facilitate loading/unloading of goods and materialsAccess to international markets (e.g. Jungbunzlauer Canada Inc.); Significant scale of employment uses	<ul style="list-style-type: none">No direct access/exposure to 400-series highway (approx. 15 kilometres south of Highway 406 terminus)Environmental constraints along Canal may limit potential for Canal access
(17) Port Colborne	Port Colborne East Port Colborne Employment Area	<ul style="list-style-type: none">Located in close proximity to Welland Canal; located east of Canal152.96 ha GDA	<ul style="list-style-type: none">Significant number of vacant lots with parcel size greater than 10 ha; also contains mix of vacant lots ranging from 1-6 haLarge parcel sizes greater than 10 hectares throughout Employment Area	<ul style="list-style-type: none">Majority of Employment Area is vacant and not developedSupports employment density of 8 jobs per hectare	<ul style="list-style-type: none">Access to Provincial Highway via Highway 140Access to Welland Canal; opportunity to expand access in the futurePotential rail access throughout Employment AreaLocated within 10-25 kilometres of border crossing	<ul style="list-style-type: none">Gateway Economic Centre	<ul style="list-style-type: none">Access (Highway 140)Transportation and infrastructure (highway, rail facilities, canal)Critical massLand use compatibilityParcel size (large range in sizes)Market choice (range of employment uses supported)	<ul style="list-style-type: none">Access (Highway 140)	<ul style="list-style-type: none">Located in strategic location for investment (Gateway CIP)	<ul style="list-style-type: none">Access to other provincial highway (Highway 140)Significant portions of undeveloped land— vacant land supply able to attract new businesses (permitted uses ranging from dry industrial, light industrial and general industrial)Opportunity to expand employment area northward along the canal to connect to employment areas	<ul style="list-style-type: none">No direct access/exposure to 400-series highway (approx. 12 kilometres south of Highway 406 terminus); Relatively located further from the US-border (10-25 kilometres) than other employment areasMajority of vacant parcels not currently municipally serviced

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			Lot sizes Topography Environmental Constraints	Building stock, sizes, age of buildings, employment density	Serviced Highway Access Other access (rail, water, airport); Planned capital projects	Land Use Designation in Local Area Official Plan	Access Transportation and Infrastructure Critical mass Parcel size Land use compatibility Market choices	Access Critical mass Minimal buffers Land use compatibility Employment supportive uses Concentration of like industries/sectors	Access to labour, transit, institutions, mix of uses, financial incentives		
(17) Port Colborne										<div>in Welland (this portion of land currently designated rural industrial)</div> <ul style="list-style-type: none">Potential for access to Welland Canal; addition of port infrastructure and facilities along the Canal to facilitate loading/unloading of goods and materials; leverage employment intensification along Canal in light of Hamilton Harbour reaching capacityOpportunity to expand and link with Employment Area located to the north in Welland; securing further access to Canal	
(18) St. Catharines	St. Catharines Port Weller Employment Area	<ul style="list-style-type: none">Located within urban area of St. Catharines77.91 ha GDA	<ul style="list-style-type: none">Approx. 75 ha of vacant employment land; 25 ha of which are servicedRange in parcel sizes from 0.5 to 7.5 hectaresVacant employment parcels range in size from 6 ha to greater than 10 haSurrounded by non-compatible land uses including residential uses	<ul style="list-style-type: none">Historical character of employment area – age of building stock dates to 1930sBuilding stock includes range of newer and older buildings; includes 1-2 storey prestige and light industrial uses, business commercial usesMajority of ands designated industrial with potential to support a wide range of heavy and light industrial usesSupports employment density of 32 jobs per hectare	<ul style="list-style-type: none">Close proximity to Welland Canal/only active port along CanalAccess to regional road via Regional Road 87Fully serviced by municipal services; Vacant employment parcels fully serviced	<ul style="list-style-type: none">General Employment	<ul style="list-style-type: none">Transportation and infrastructure (proximity to canal)Critical massParcel size (supports small to large scale uses)Land use compatibility (towards southern portion)	<ul style="list-style-type: none">Character (streetscaping; landscaping)Minimal land use buffers (towards northern portion)	<ul style="list-style-type: none">n/a	<ul style="list-style-type: none">Significant government land holdings may provide opportunity to attract strategic investment from multiple levels of governmentClose proximity/direct access to the only active port along the Welland Canal presents opportunity to attract marine-related employment usesProximity to agricultural/wine producing uses may present opportunity to support agriculture-related employment uses including horticulture, food processing, etc.	<ul style="list-style-type: none">No direct access to 400-series highway (approx. 8-10 kilometres to QEW) may present challenges to attracting logistics-based employment usesAdjacent sensitive land use (residential) may present land use compatibility issues/limit expansion opportunitiesHistorical contamination has created requirements for brownfield redevelopment/remediation; may present challenges to future development costs
(19) St. Catharines	St. Catharines Eastchester Industrial Area	<ul style="list-style-type: none">Located in central-eastern portion of City of St. CatharinesOne of the largest employment areas in Niagara Region217.22 ha GDA	<ul style="list-style-type: none">Vacant employment land parcels range from <1 ha to 3-6 haApprox. 12 ha of vacant serviced employment land	<ul style="list-style-type: none">Supports employment density of 35 jobs per hectareBuilt form characterized by 1-3 storey buildings; consisting of business commercial plazas, warehousing and outdoor storage, light and general industrial buildingsMedian rental building area of 15,061 m² (from	<ul style="list-style-type: none">Access to multiple major regional transportation routes including. QEW (running through Employment Area) and Highway 406 (located immediately south)Employment parcels are fully serviced	<ul style="list-style-type: none">General Employment and Business Commercial Employment	<ul style="list-style-type: none">Access (QEW)Critical massLocation (multiple access points)Parcel size (range from small to large sizes)Land use compatibilityMarket choice (mix of vacant large parcels)	<ul style="list-style-type: none">Access (QEW)Critical massEmployment-supportive uses	<ul style="list-style-type: none">Close proximity to Niagara District AirportClose proximity to Brock University and Niagara CollegeMix of commercial/retail uses throughout Employment Area	<ul style="list-style-type: none">Approaching size and scale of significant employment area comparable to other areas across the GGH (approx. 275 hectares)Supports largest employment base in the Region (approx.. 10,000 full time jobs)Direct access/exposure to QEWPossibility for expanded access to	<ul style="list-style-type: none">Sensitive land uses (e.g. residential) to the north and west of employment area may limit some industrial/manufacturing uses

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				sample size of 213 buildings) <ul style="list-style-type: none">Building stock age range from 1912 to 2013 (median age of 1976)						<ul style="list-style-type: none">Welland Canal (small minority of parcels)Located in close proximity to St. Catharines Urban Growth Centre; potential for transit expansion	
(20) St. Catharines	St. Catharines QEW Centre Employment Area	<ul style="list-style-type: none">Centrally located in the City of St. Catharines10.28 ha GDA	<ul style="list-style-type: none">Lot sizes range from 0.1 to 0.6 hectaresMinimal environmental constraints; however, surrounded by non-compatible residential uses to the east	<ul style="list-style-type: none">Building stock age ranges from 1957 to 1989, with a median age of 1972 (based on a sample size of 24 buildings)Building stock characterized by low rise 1-2 storey warehousing and business commercial buildingsSupports high employment density (approx. 95 jobs per hectare)	<ul style="list-style-type: none">Direct access/exposure to QEW via Ontario Street interchangeFully serviced by municipal services	<ul style="list-style-type: none">Business Commercial Employment	<ul style="list-style-type: none">Access (QEW)Parcel size (supports small and medium scale facilities)	<ul style="list-style-type: none">Access (QEW)Minimal land use buffers	<ul style="list-style-type: none">Close proximity to transit hub at Fairview Mall	<ul style="list-style-type: none">Direct access/exposure to QEW; centrally located in St. Catharines	<ul style="list-style-type: none">Surrounded by sensitive land uses (residential) to the east
(21) St. Catharines	St. Catharines QEW West Employment Area	<ul style="list-style-type: none">Located in western portion of City of St. Catharines23.90 ha GDA	<ul style="list-style-type: none">Lot sizes range from 0.6 to 3.5 hectaresLocated adjacent to wetlands/marsh and Twelve Mile Creek to east of Employment Area	<ul style="list-style-type: none">Building stock characterized by mix of office buildings and low rise warehousing buildings, employment plazasPresence of campus-style office buildings towards northern portion of Employment Area (range from 1-4 storeysAge of building stock ranges from 1946 to 2014, with a median age of 2000 (based on sample size of 12 buildings)Supports high employment density (149 jobs per hectare)	<ul style="list-style-type: none">Direct access/exposure to QEWClose proximity to Highway 406Fully serviced by municipal services	<ul style="list-style-type: none">Business Commercial Employment	<ul style="list-style-type: none">Access (QEW)Critical massParcel size (supports range of small and medium scale uses)Land use compatibility	<ul style="list-style-type: none">Access (QEW)Critical massLand use compatibilityCharacter (streetscaping and landscaping)	<ul style="list-style-type: none">n/a	<ul style="list-style-type: none">Close proximity/direct access/exposure to QEWPresence of multi-storey campus-style office buildings unique asset or Niagara Region to attract prestige businesses in the futureBuffering from adjacent residential uses to the west of the employment area provided by forested area/natural features	<ul style="list-style-type: none">Environmental constraints and Twelve Mile Creek limit expansion opportunities to the east; limited opportunities to expand employment area
(22) St. Catharines	St. Catharines Louth Employment Area	<ul style="list-style-type: none">Located in western St. Catharines85.57 ha GDA	<ul style="list-style-type: none">Lot sizes range considerably from 2,483 to 118,595 m²Median parcel size of 6,649 m²Lots are generally regularly shaped/typical lotting pattern	<ul style="list-style-type: none">Building stock characterized by low-rise built form, warehouse typologyBuilding stock tends to be relatively more recent (within past 20-30 years)Mix of standalone establishments and plaza typologiesSupports employment density of 40 jobs per hectare	<ul style="list-style-type: none">Close access to Highway 406Potential for rail accessFully serviced by municipal services	<ul style="list-style-type: none">General EmploymentSt. Catharines GO Transit Station Secondary Plan	<ul style="list-style-type: none">Access (QEW)Critical massParcel size (supports range of small and medium scale uses)Land use compatibility	<ul style="list-style-type: none">Access (QEW)Critical massLand use compatibility	<ul style="list-style-type: none">Access to inter-regional labour (St. Catharines GO Station)Close proximity to major public service facilities (Niagara Health Network St Catharines Site)	<ul style="list-style-type: none">Close proximity to Highway 406Close proximity to St. Catharines GO Station provides opportunities for attracting inter-regional labour forceOP permits development up to 6 storeys which may be conducive to future office/business park developmentAdjacent land uses are supportive and provide buffer to residential	<ul style="list-style-type: none">Existing residential lots along St. Paul Street West may create compatibility issues

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										communities (e.g. hospital and major retail to the north/west)	
(23) St. Catharines	St. Catharines Welland Canal Employment Area	<ul style="list-style-type: none">Located in eastern St. Catharines along the Welland Canal91.13 ha GDA	<ul style="list-style-type: none">Employment land lots range in size from approx. 0.8 ha to 50 ha	<ul style="list-style-type: none">Building stock varies significantly in terms of footprint areasPresence of 1 large-scale product assembly buildings with large footprints (15 ha)Building stock tends to be low-rise with 1-2 storeyBuilding stock tends to be relatively older (50-60 years old)Supports employment density of 28 jobs per hectare	<ul style="list-style-type: none">Fully serviced by municipal servicesPotential for expanded access to	<ul style="list-style-type: none">General Employment	<ul style="list-style-type: none">AccessTransportation and infrastructureParcel SizeLand use compatibilityMarket choice	<ul style="list-style-type: none">AccessCritical massLand use compatibility	<ul style="list-style-type: none">Access to regional-scale labour through GM plant	<ul style="list-style-type: none">GM assembly plant represents key employment generatorAccess for expanded rail access	<ul style="list-style-type: none">Transportation linkages somewhat limited by Welland Canal (e.g. Glendale Bridge)
(24) Thorold	Thorold Brock Park Employment Area	<ul style="list-style-type: none">Centrally located in Thorold, in close proximity to Brock UniversityLocated within Urban Area of ThoroldLocated in close proximity to Brock University, Regional Headquarters24.45 ha GDA	<ul style="list-style-type: none">Range in size of parcel sizes from <1-2 hectares; consistent size and shape of parcels (mostly rectangular lots)	<ul style="list-style-type: none">Building stock characterized by low rise institutional and office buildings; recent construction ofBuilding footprints contain a median rental floor area of 27,171 m²Age of building stock ranges from 1991 and 1988 (based on sample size of 2 buildings)Supports employment density of 73 jobs per hectare	<ul style="list-style-type: none">Located in close proximity to Highway 406Full municipal services	<ul style="list-style-type: none">Brock Business Park EmploymentBrock Business Park Secondary Plan	<ul style="list-style-type: none">Access (Highway 406)Parcel sizes (support medium and large scale uses)	<ul style="list-style-type: none">Access (Highway 406)Land use compatibilityEmployment-supportive usesCharacter (campus-style)	<ul style="list-style-type: none">Close proximity to Brock University, Regional HeadquartersMix of institutional and residential uses throughout Employment AreaLocated in strategic location for investment (Gateway CIP)	<ul style="list-style-type: none">Ability to accommodate range of office and research/development land uses; campus style settingClose proximity to Brock University and Niagara Regional Headquarters—capitalizes on market opportunity for research and development and technology employment uses; capitalizes on market opportunity for research/development/technology	<ul style="list-style-type: none">Environmental constraints along southern boundary of employment area
(25) Thorold	Thorold McCleary Drive Employment Area	<ul style="list-style-type: none">Entirety of employment area located within urban area22.25 ha GDA	<ul style="list-style-type: none">Range in parcel sizes from <1 to >5 hectares	<ul style="list-style-type: none">Ability to accommodate range of general industrial land usesSupports employment density of 49 jobs per hectare	<ul style="list-style-type: none">Fully serviced; availability of pre-serviced lots in business park settingPotential for rail access along southern portion of employment areaAccess to other provincial highway (Highway 58)	<ul style="list-style-type: none">General Industrial	<ul style="list-style-type: none">Access (Highway 406 and 58)Land use compatibilityMarket choice (employment area mostly vacant)	<ul style="list-style-type: none">Access (Highway 406 and 58)	<ul style="list-style-type: none">Located in strategic location for investment (Gateway CIP)	<ul style="list-style-type: none">Majority of parcels are vacant; represents opportunity to attract general industrial uses in the future	<ul style="list-style-type: none">Relatively small employment area (approx. 25 hectares in total); limited opportunities to expand beyond current boundaries and support a critical mass of employment uses
(26) Thorold	Thorold Highway 58 Employment Area	<ul style="list-style-type: none">Located approx. 700 m south of downtown ThoroldBordered to the east by Welland CanalHighway 58 runs underneath employment area as	<ul style="list-style-type: none">Range in parcel sizes from 0.2 to 2.1 hectares to support range of employment usesFew environmental encumbrances identified on Regional mapping	<ul style="list-style-type: none">Building stock characterized by low rise warehousing and automobile-related buildings; significant portions of outdoor storage	<ul style="list-style-type: none">Close proximity to other provincial highway (Highway 58)Potential for rail access throughout employment areaPotential for Canal access along eastern	<ul style="list-style-type: none">General Industrial	<ul style="list-style-type: none">Access (Highway 58)Location (multiple access points)Land use compatibility	<ul style="list-style-type: none">Access (Highway 58)	<ul style="list-style-type: none">Located in strategic location for investment (Gateway CIP)	<ul style="list-style-type: none">Existing employment uses include automobile-related facilities and truck rentals; opportunity to support auto-focuses employment area	<ul style="list-style-type: none">Surrounded by sensitive land uses (e.g. residential and commercial uses) that may limit viability/expansion of certain employment usesRelatively small employment area




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(26) Thorold		it crosses Welland Canal <ul style="list-style-type: none">9.27 ha GDA		<ul style="list-style-type: none">Building footprints range from 110 m² to 1,400 m²Supports employment density of 40 jobs per hectare	portion of employment area		<ul style="list-style-type: none">Parcel size (range from small to medium scale uses)				(approx. 12 hectares) with limited opportunities for expansion <ul style="list-style-type: none">No direct access to Highway 58 (must be accessed via Pine Street approx. 400 metres to the west); poor visibility from Highway 58 due to grade separation
(27) Thorold	Thorold Welland Canal Employment Area	<ul style="list-style-type: none">Significant portions of vacant/ undeveloped parcels towards the southern portion of employment area along the Welland Canal210.08 ha GDA	<ul style="list-style-type: none">Range in size and location of parcels from <1 to >10 hectaresSome very large parcel sizes with areas greater than 54 ha in area	<ul style="list-style-type: none">Supports employment density of 4 jobs per hectare	<ul style="list-style-type: none">Potential for expanded access to Welland CanalOpportunities for expanded rail access throughout the employment areaAccess to Highway 58	<ul style="list-style-type: none">General Employment	<ul style="list-style-type: none">Access (Highway 58)Location (multiple access points)Transportation and Infrastructure (rail facilities and canal)Critical massLand use compatibilityParcel size (medium to large scale uses)Market choice (large, vacant lots; supports range of employment uses)	<ul style="list-style-type: none">Access (Highway 58)Critical mass	<ul style="list-style-type: none">Located in strategic location for investment (Gateway CIP)	<ul style="list-style-type: none">Currently supports significant scale/cluster of pulp and paper and energy-related employment usesSignificant portions of vacant/undeveloped parcels towards the southern portion of employment area along the Canal; represents opportunity to attract additional employment uses	<ul style="list-style-type: none">No direct access/exposure to 400-series highwayBounded by sensitive land uses (residential) to the east that may limit viability/expansion of certain employment uses
(28) Welland	Welland North Employment Area	<ul style="list-style-type: none">Located within urban boundary of WellandLocated south of major retail facility197.30 ha GDA	<ul style="list-style-type: none">Range in employment land parcel size from <1 to >10 hectares; overall large lots with space for outdoor storage and expansion potential	<ul style="list-style-type: none">Supports employment density of 7 jobs per hectare	<ul style="list-style-type: none">Direct access/exposure to Highway 406Employment area fully servicedPotential for rail access throughout employment area	<ul style="list-style-type: none">General Industrial	<ul style="list-style-type: none">Access (Highway 406)Transportation and Infrastructure (rail facilities)Critical massParcel size (medium to large scale uses)Land use compatibility	<ul style="list-style-type: none">Access (Highway 406)Critical massEmployment supportive usesLand use compatibility	<ul style="list-style-type: none">Close proximity to Niagara College Welland CampusLocated in strategic location for investment (Gateway CIP)	<ul style="list-style-type: none">Significant portions of vacant employment land available for development/redevelopmentOpportunity to capitalize on advanced manufacturing/specialized transportation and warehousing employment usesIntermodal opportunities for multiple transportation modes (ship, rail, truck)	<ul style="list-style-type: none">Sensitive land uses (residential) immediately south of employment areaPossible remediation necessary to redevelopment certain parcels
(29) Welland	Welland West Employment Area	<ul style="list-style-type: none">Located within urban boundary of Welland, along the peripheryBounded by Feeder Road, rail corridor and Welland Canal59.30 ha GDA	<ul style="list-style-type: none">Range in lot size from 0.2 ha to 5.6 ha	<ul style="list-style-type: none">Supports Employment Density of 22 jobs per hectare	<ul style="list-style-type: none">Access to other provincial highway (Highway 140)Potential for rail accessPotential for access to Welland Canal along southwestern portion of employment area	<ul style="list-style-type: none">Light Industrial	<ul style="list-style-type: none">Access (Highway 58A)Approaching critical massLand use compatibilityParcel size (supports small and medium scale uses)	<ul style="list-style-type: none">Access (Highway 58A)Approaching critical mass	<ul style="list-style-type: none">Located in strategic location for investment (Gateway CIP)	<ul style="list-style-type: none">Approaching significant size and scale of employment uses (approx. 340 hectares in size)Supports multiple largescale employment uses (research and technology; steel processing; mining and metals)	<ul style="list-style-type: none">Significant portions of environmental constraints in the southern portion of employment area
(30) Welland	Welland East Employment Area	<ul style="list-style-type: none">Located within urban boundary of Welland; Employment Area bounded by periphery of urban boundary	<ul style="list-style-type: none">Large lot sizes (e.g. 30, 33, 42 ha in size)Lot sizes range from 0.15 ha to over 40 ha	<ul style="list-style-type: none">Built form across Employment Area is diverse and includes major industrial and research/development facilities (e.g. GE Brilliant Factory,	<ul style="list-style-type: none">Direct access to provincial highway (Highway 58A)Potential for rail access along	<ul style="list-style-type: none">Light Industrial and General Industrial	<ul style="list-style-type: none">Access (Highway 27, Highway 140, Highway 58A)	<ul style="list-style-type: none">Access (Highway 27, Highway 140, Highway 58A)Critical mass	<ul style="list-style-type: none">Located in strategic location for investment (Gateway CIP)	<ul style="list-style-type: none">Direct access to provincial highway (Highway 58A)Potential for rail access along	<ul style="list-style-type: none">Some parcels are not serviced or only partially serviced

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(30) Welland		<ul style="list-style-type: none">295.37 ha GDA		<p>Welded Tube Welland facility,)</p> <ul style="list-style-type: none">Building footprint range from 41,500 m²Supports employment density of 6 jobs per hectare	southern portion of employment area		<ul style="list-style-type: none">Transportation and infrastructure (rail facilities, canal access)Critical massParcel size (supports medium and large facilities)Land use compatibilityMarket choice (availability of large, vacant parcels)			<p>southern portion of employment area</p> <ul style="list-style-type: none">Recent opening of GE Brilliant Facility represents opportunity for future expansion of technology-based employment uses	
(31) West Lincoln	West Lincoln Employment Area	<ul style="list-style-type: none">Located wholly within the urban area of West LincolnPartially located within built boundary —portions designated for Urban Boundary Expansion – Employment)112.65 ha GDA	<ul style="list-style-type: none">Large diversity in parcel sizes; Lot sizes range from approx. 5200 m² to over 4 haEnvironmental constraints located adjacent to and within the Employment Area (e.g. significant woodlots)	<ul style="list-style-type: none">Built form characterized by low rise warehousing and light industrial buildings with significant portions of outdoor storageBuilding footprints range from 300 m² to 4,700 m²Supports employment density of 16 jobs per hectare	<ul style="list-style-type: none">Potential for rail access along southern portion of employment areaNo direct access to 400-series highway or regional road	<ul style="list-style-type: none">Employment Area and Institutional	<ul style="list-style-type: none">Transportation and infrastructure (potential rail access)Parcel size (supports small to medium facilities)Location (multiple access points off of regional roads)	<ul style="list-style-type: none">Parcel sizes (range in size; supports small to medium scale uses)Market choice (availability of large, vacant lots)	<ul style="list-style-type: none">n/a	<ul style="list-style-type: none">Significant scale of utility-related employment uses present throughout Employment Area; presents opportunities to specialize Employment Area to meet specific needs	<ul style="list-style-type: none">No direct access to 400-series or other provincial highway (approx.. 12 kilometres south of the QEW)Relatively farther distance to international border crossings (approx. 80 kilometres to Peace Bridge crossing)Portions of employment area not serviced

Appendix C

Cross-jurisdictional scan of GGH employment areas and corridors

Appendix C: Cross jurisdictional review of GGH employment areas and corridors

Region of Durham						
Major Employment Areas	Hierarchy of Employment Lands	Access to Transportation Infrastructure	Access to Inter-Regional Economic Markets	Significant Scale and Cluster of Economic Output	Flexibility of Land Use Patterns	Recognition and Protection within Land Use Planning
  	<ul style="list-style-type: none">No defined hierarchy in ROPDistinction between urban and rural employment areasIdentification of corridors (esp. 400-series highways) for protection for future employment usesThree employment zones along Highway 401 identified as provincially significant¹Durham South (Pickering-Ajax)Durham South (Oshawa-Whitby)Durham South (Oshawa East-Clarington)	<ul style="list-style-type: none">EmploymentMajor employment areas located within 1-3 kilometres of a 400-series highwayHighway 401Highway 407Highway 412Highway 418Highway 115CP Rail corridorCN Rail corridor	<ul style="list-style-type: none">Direct access to Windsor-Quebec corridor via Highway 401Direct access to GTHA and Southern Ontario markets via Highways 401 and 407Opportunities for access to North American-wide rail systemClose proximity to Quebec and US markets (approx. 180 kilometres to US border, or 2-hour drive)Implementation of Pegasus Project (related to autonomous vehicles) focusing on attracting investment and jobs from Germany to Durham RegionDurham Region actively involved in developing relationships and business opportunities in Brazil, China, India and Japan to bring investment and jobs to the regionDurham Economic Development Office (DEDO) involved with forging relationships with US Site Selectors and other intermediaries	<ul style="list-style-type: none">Major cluster of manufacturing related employment uses along Highway 401 corridor characterized by the automotive, metal fabrication, environmental, biological and life sciences and aerospace sectors, as well as IT and engineered assembly systemsGeneral Motors Oshawa Assembly plant is one of the largest employers; significant scale and clustering of automobile-related industriesSignificant clustering of logistics and freight related industries along Highway 401 corridorPickering Nuclear Generating Station and Darlington Nuclear Generating Station; significant scale of energy-related industries along Lake Ontario waterfrontDurham College, UOIT significant post-secondary institutions that contribute to highly educated workforce	<ul style="list-style-type: none">Total Designated Employment Area (urban only) of 7,311 ha (2017)Net Developable Employment Area of 5,611 ha (2017)²57% of employment areas vacant³25% of employment areas developed1,262 vacant parcels of employment land (2017) representingRange in employment land parcel size from small to large size lotsEmerging development opportunities in new non-residential growth areas in the Seaton employment lands in Pickering and the soon to be serviced employment lands along Highway 407 in Whitby and Oshawa represent significant assets for the region for attracting investment and jobs	<ul style="list-style-type: none">Yes—identification within Regional Official Plan; employment areas are to be protected for current and future employment uses; additionally, corridors along Highways 401 and 407 corridors are to be protected for employment uses⁴Strategic employment areas such as the Seaton Employment Lands adjacent to Highway 407 specifically identified^{5 6}

¹ Ministry of Municipal Affairs and Housing. 2019. Proposed Provincially Significant Employment Zones: <http://www.mah.gov.on.ca/Page20928.aspx>


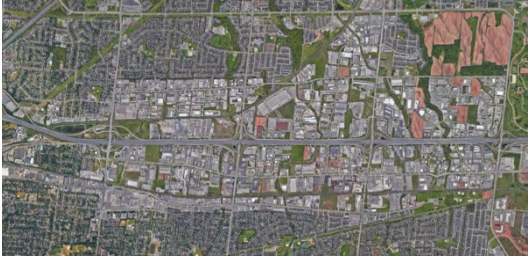


² Durham Region. 2017. Employment Lands Inventory, 2017: <https://www.durham.ca/en/living-here/planning-for-growth.aspx>

³ Durham Region. 2017. Map 1 – Region of Durham Employment Lands: https://www.durham.ca/en/living-here/resources/Documents/EnvironmentalStability/EAServicing_Durham.pdf

⁴ Durham Region. 2017. Durham Region Economic Development Strategy: <https://www.durham.ca/en/doing-business/resources/Documents/EconomicDevelopment/EconomicDevelopmentStrategy2017-2021.pdf>

⁵ Durham Region. 2017. Durham Regional Official Plan (May 2017 Consolidation): <https://www.durham.ca/en/doing-business/resources/Documents/PlanningandDevelopment/Official-Plan/2017-Durham-Regional-Official-Plan-Consolidation.pdf>

⁶ Hemson Consulting. 2015. Seaton Employment Lands Economic Development Study Update: https://www.pickering.ca/en/city-hall/resources/Seaton_March2015_EconomicDevelopmentStudyUpdate.pdf

Region of Halton						
Major Employment Areas	Hierarchy of Employment Lands	Access to Transportation Infrastructure	Access to Inter-Regional Economic Markets	Significant Scale and Cluster of Economic Output	Flexibility of Land Use Patterns	Recognition and Protection within Land Use Planning
   	<ul style="list-style-type: none"> • Future Strategic Employment Areas identified as Overlay in ROP • Distinction between rural and urban employment areas • Fourteen existing and seven planned employment areas throughout the region • Derry Green Corporate Business Park • Premier Gateway Employment Area (Halton Hills) • North Oakville (East and West) Employment District (Oakville) • Three employment zones along Highway 401 identified as provincially significant⁷ • 401-407 (Meadowvale) • Milton • Oakville (Oakville East) • Oakville (QEW) 	<ul style="list-style-type: none"> • Within ROP, Employment Areas are identified to be located in the vicinity of existing major highway interchanges and rail yards, where appropriate, within the Urban Area • Pattern of linear development of employment areas along 400-series highways throughout the region; majority of designated employment areas are within 1-4 kilometres of a 400-series highway • Halton's employment lands are well suited geographically with close access to multiple 400-series highways, rail, intermodal facilities, and proximity to Pearson airport • Highway 401 • Highway 403 • Highway 407 • Queen Elizabeth Way • CP Rail Corridors • CN Rail Corridors 	<ul style="list-style-type: none"> • Direct access to Windsor-Quebec corridor via Highway 401 • Direct access to GTHA and Southern Ontario markets via Highways 401 and 407 • Opportunities for access to North American-wide rail system • Close proximity to Quebec and US markets (approx. 180 kilometres to US border, or 2-hour drive) • Close proximity to Southern Ontario and US markets (approx. 90 kilometres to US border, or 1-hour drive) 	<ul style="list-style-type: none"> • Halton has strong employment concentrations in many of the GGH's mature economic sectors including production technology, aerospace, automotive, and processed foods; employment lands in the Region are importance because they primarily accommodate export-oriented employment uses; major export-oriented employment clusters in Halton include locally and regionally significant sectors such as: <ul style="list-style-type: none"> ○ Professional, scientific and technical services; ○ Value-added manufacturing; ○ Financial services; ○ Information and communications technology⁸ • Halton's designated employment lands have higher than average concentrations of employment in distribution services, plastics, and metal manufacturing relative to the rest of the GGH⁹ • Significant scale and clustering of logistics-related employment uses in Milton located along Highway 401 corridor (e.g. Lowes distribution centre, Amazon Fulfilment Centre along James Snow Parkway North) • Major automobile production facility and related employment uses located in proximity to Oakville Assemble Complex, Ford Motor Company of Canada 	<ul style="list-style-type: none"> • Range in size of parcels in employment areas from 1-10 hectares; larger parcel sizes of up to 20 hectares located in Halton Hills Premier Gateway Business Park and Milton 401 Industrial Park¹⁰ • Overall, Halton has moderate supply of vacant employment land; Premier Gateway Business Park in Halton Hills has largest supply of vacant designated employment land, approximately 450 net ha; Burlington QEW West (170 net ha); Milton 401 Industrial Business Park (130 net ha) • Range of employment designations provide flexibility for potential businesses located throughout Halton 	<ul style="list-style-type: none"> • Objective of Urban Area to provide for an appropriate range and balance of employment uses including industrial, office and retail and institutional uses to meet long-term needs; to direct where employment uses should be located and to protect areas designated for such uses¹¹ • Identification of employment lands within the proposed expansion area that should be designated and protected for the long-term due to their proximity to major transportation facilities and <i>infrastructure</i>.¹² • Protect employment lands for economic development during the current planning period to 2031 • Prohibit the re-designation of lands within the Future Strategic Employment Areas to uses that are incompatible with employment uses in the long term, especially non-farm uses such as institutional and recreational uses. • Future Strategic Employment Areas are to be Considered for inclusion into the Urban Area

⁷ Ministry of Municipal Affairs and Housing. 2019. Proposed Provincially Significant Employment Zones: <http://www.mah.gov.on.ca/Page20928.aspx>





⁸ Halton Region. 2011. Regional Municipality of Halton: Economic Development Strategic Directions Report: <http://www.halton.ca/repository/Economic-Development-Strategic-Directions-Report>

⁹ Ibid.




¹⁰ Halton Region. 2017. The Regional Municipality of Halton 2016 Competitiveness Study: <https://www.halton.ca/repository/Halton-Competitiveness-Study-2016>

¹¹ Halton Region. 2011. Strategic Implementation Plan: <http://www.halton.ca/repository/Strategic-Implementation-Plan-Economic-Developme>

¹² Halton Region. 2017. Regional Official Plan: <http://www.halton.ca/repository/Halton-Region-Economic-Review-2017>




Region of Peel						
Major Employment Areas	Hierarchy of Employment Lands	Access to Transportation Infrastructure	Access to Inter-Regional Economic Markets	Significant Scale and Cluster of Economic Output	Flexibility of Land Use Patterns	Recognition and Protection within Land Use Planning
   	<ul style="list-style-type: none"> Hierarchy of employment areas identified in ROP—specific policies/emphasis related to employment areas in vicinity of Pearson Airport; rail yards, highway interchanges Definition of Employment areas—based on local municipality OP designations (e.g. Industrial, Corporate Centres, Employment Areas) Four PSEZs recognized in Proposed Amendment 1 of Growth Plan 401 407 (Meadowvale) 427 QEW Pearson Airport Hub (Airport) Pearson Airport Hub (Airport Hwy 50) Mavis and Burnhamthorpe 	<ul style="list-style-type: none"> Very high connectivity to range of major goods movement facilities including: <ul style="list-style-type: none"> Highway 401; Highway 403; Highway 407; Highway 409; QEW; CP Rail Corridor; CN Rail Corridor; Pearson International Airport <ul style="list-style-type: none"> Airport identified as key part goods movement system—objective to optimize economic potential of the airport (and Brampton Flying Club) CP Brampton intermodal facility (Canada’s largest intermodal facility; handles 60% of CP’s intermodal traffic)¹³ CP Vaughan intermodal facility 	<ul style="list-style-type: none"> Regional access to GGH and US markets through rail and highway network Airport identified as significant international transportation linkage—businesses in proximity to airport have access to international market via air travel/cargo Direct access to Windsor-Quebec corridor via Highway 401 Direct access to GTHA and Southern Ontario markets via Highways 401 and 407 Opportunities for access to North American-wide rail system Close proximity to Quebec and US markets 	<ul style="list-style-type: none"> Yes – Large clusters of employment uses surrounding Pearson International Airport – multiple “mega clusters” Major cluster of logistics and transportation-related businesses Major hub for head office locations/prestige office parks 	<ul style="list-style-type: none"> Peel 2041 Growth Management ROPA— Employment Land Employment: Municipalities should encourage a range of parcel sizes, locations, and timing/levels of servicing of employment lands, in order to be responsive to occupier and developer requirements. Having an adequate supply of serviced lands can act to suppress land price inflation, by ensuring choice in the marketplace, and enabling multiple market participants (not one dominant land owner/investor). Recommended planning tools to broaden the variety of employment lands: <ul style="list-style-type: none"> Designating additional lands Acquiring land – owning lands and creating a municipal business park (to have influence over the size of parcels, timing of development, and future ownership). Development incentives – (e.g. subdividing lots to support smaller/larger scale uses as market demand dictates) Peel’s office inventory approximately 30 million sq. ft. in 2017; represents 34% of overall GTA suburban office stock 	<ul style="list-style-type: none"> ROP definition: areas that are designated in area municipal official plans for clusters of business and economic activities including, but not limited to, manufacturing, warehousing, offices, and associated retail and ancillary facilities. Employment areas are designated in area municipal official plans as described in Section 5.6.2.6. Peel Region identifies specific employment areas identified in local official plans that are to be protected and for employment uses. Regional Official Plan also sets out that employment areas shall be located adjacent or in proximity to major goods movement facilities. Specifically, areas in the vicinity of the Toronto Pearson International Airport, major highway interchanges and rail yards shall be protected and supported for future employment areas for manufacturing, warehousing and associated retail, office and ancillary uses.

¹³ Peel Region. 2017. Goods Movement Strategic Plan 2017-2021: <https://www.peelregion.ca/pw/transportation/goodsmovement/pdf/goods-movement-strategic-plan-2017-2021.pdf>

Region of Waterloo						
Major Employment Areas	Hierarchy of Employment Lands	Access to Transportation Infrastructure	Access to Inter-Regional Economic Markets	Significant Scale and Cluster of Economic Output	Flexibility of Land Use Patterns	Recognition and Protection within Land Use Planning
  	<p>ROP identifies employment areas with specific policies related to Waterloo Regional Airport: The Region will continue to support the strategic development of employment areas in the vicinity of the Region of Waterloo International Airport to ensure these lands are readily available for development upon justification being established to bring them into the Urban Area.¹⁴</p> <ul style="list-style-type: none">• ROP emphasizes hierarchy of employment lands in proximity to highways, airport, rail, other goods movement corridors• ROP also identifies “Prime Industrial/Strategic Reserve” employment lands• Three PSEZs identified in Proposed Amendment 1 to the Growth Plan:• Waterloo;• Cambridge West;• Cambridge East	<ul style="list-style-type: none">• Highlights employment areas in vicinity of existing major highway interchanges, rail yards, or the Region of Waterloo International Airport as employment areas, where appropriate.• Policy 4.B.4: The Region will continue to advocate for improvements to the Provincial Highway system to support more effective movement of people and goods within and beyond Waterloo Region.• Policy 4.B.1: Region of Waterloo International Airport to be planned, managed, promoted as integral element in moving people and goods to and from Waterloo Region• Policy 4.B.3: Region to continue to advocate for provision of high-speed rail on Windsor-Quebec City Corridor• Clustering of large employment areas along 400-series/major highway corridors throughout the Region; majority of employment areas located within 2 kilometres of highway• Highway 401;• Highway 85;• Highway 8;• Multiple rail corridors	<ul style="list-style-type: none">• In the past, active engagement between the Region and Canada’s Technology Triangle Inc.; Region will provide information, research, financial and in-kind support as appropriate to assist in marketing Waterloo Region to the world.• Waterloo Region situated along Highway 401 corridor; direct access to Windsor-Quebec City corridor with access to US and Canadian markets	<ul style="list-style-type: none">• Strong emphasis in employment areas on advanced manufacturing, information and technology industries• Significant scale of related industries surrounding Toyota manufacturing plant (automobile-related industries)• High growth sectors include high tech software, communications technologies, advanced manufacturing; these areas are given priority/attention in municipal economic development policies¹⁵	<ul style="list-style-type: none">• Large size of parcels in employment areas• Establishment of minimum parcel size of 8 hectares in order to accommodate range of industrial uses	<ul style="list-style-type: none">• ROP Policy 4.A.3: Area Municipalities are encouraged to designate and preserve lands within the Urban Area and Township Urban Areas in the vicinity of existing major highway interchanges, rail yards, or the Region of Waterloo International Airport as employment areas, where appropriate.• ROP Policy 4.A.4: The Region and Area Municipalities will collaborate with the Province as required to identify provincially strategic employment areas to help maintain and enhance the Greater Golden Horseshoe’s position in the global economy• ROPA 2 – July 2018; designate 14.49 hectares of land as Prime Industrial/Strategic Reserve in northern part of City of Cambridge

¹⁴ Region of Waterloo. 2019. ROP: https://www.regionofwaterloo.ca/en/resources/Regional-Official-Plan/7_-_chapter_4_consolidated_rop_2015---access.pdf




¹⁵ Region of Waterloo. 2017. Waterloo Region Economic Development Strategy: <https://www.regionofwaterloo.ca/en/resources/waterloo-region-economic-development-strategy-access.pdf>

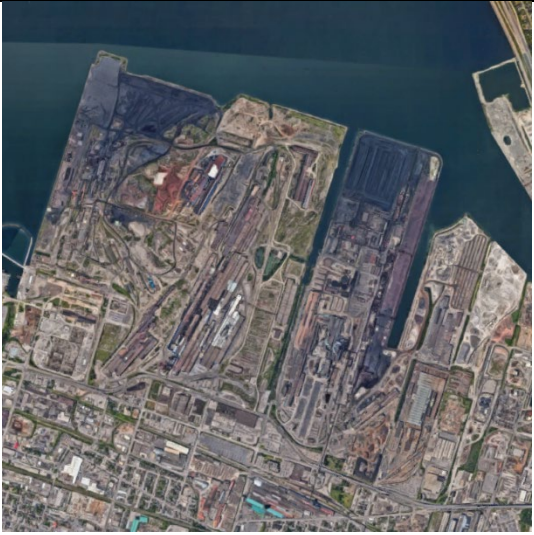


Region of York						
Major Employment Areas	Hierarchy of Employment Lands	Access to Transportation Infrastructure	Access to Inter-Regional Economic Markets	Significant Scale and Cluster of Economic Output	Flexibility of Land Use Patterns	Recognition and Protection within Land Use Planning
  	<ul style="list-style-type: none">• ROP identifies Future Strategic Employment Areas— 7 conceptual areas• Policy 4.3.6: To protect strategic employment lands, including lands identified in Figure 2. These lands are identified based on their proximity to existing or planned 400-series highways and shall be designated for employment land uses in local municipal official plans.^{16 17}• Policy 4.3.7: To require local municipalities to give priority to the strategic employment lands identified in Figure 2 when considering additional employment land designations.• Total of 5 PSEZs identified:• 404 407 (Markham)• 400 407 (400 Corridor)• 400 407 (Vaughan North)• 400 407 (Keele Dufferin)• Pearson Airport Hub (Airport Highway 50)	<ul style="list-style-type: none">• Yes— all employment areas located adjacent to major transportation infrastructure/goods movement facilities• Highway 407;• Highway 400;• Highway 427;• Highway 404;• Rail corridors;• Major rail hubs/yards including McMillan Yard in Vaughan	<ul style="list-style-type: none">• Regional access to GGH and US markets through rail and highway network• Airport identified as significant international transportation linkage—businesses in proximity to airport have access to international market via air travel/cargo• Direct access to Windsor-Quebec corridor via Highway 401• Direct access to GTHA and Southern Ontario markets via Highways 401 and 407• Opportunities for access to North American-wide rail system• Close proximity to Quebec and US markets	<ul style="list-style-type: none">• Identified as one of the fastest growing areas in the GGH in terms of employment land employment• Major cluster of logistics and transportation-related businesses• Major hub for head office locations/prestige office parks	<ul style="list-style-type: none">• Pull information from York Region Vacant Employment Land Inventory¹⁸• 2588 hectares of vacant employment lands as of 2017• Proximity to major goods movement facilities and corridors• Low density uses – existing and/or planned• Manufacturing, warehousing and logistics• Nearly 84% of vacant employment land, amounting to over 2,183 net hectares of land, is within 5 km of a 400-series highway.• 60% of vacant employment parcels amounting to approximately 928 net hectares of vacant employment land are within 500 metres of a transit stop.	<ul style="list-style-type: none">• Recognition of Strategic Employment Areas with 7 conceptual areas identified in the York ROP• At the local level, there are 24 different employment designations across the Region• Policies in the ROP identifying protection for employment areas

¹⁶ York Region. 2010. ROP Chapter 4, Economic Vitality: <https://www.york.ca/wps/wcm/connect/yorkpublic/63bb3c1c-2edd-4014-aad0-8eab881f4452/yropConsolidation2016AccessibleMay42016Ch4.pdf?MOD=AJPERES>

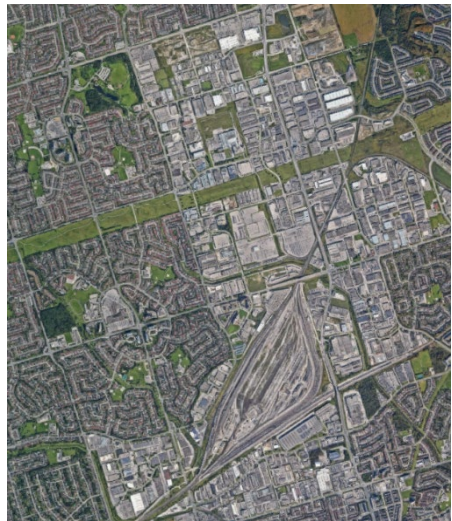

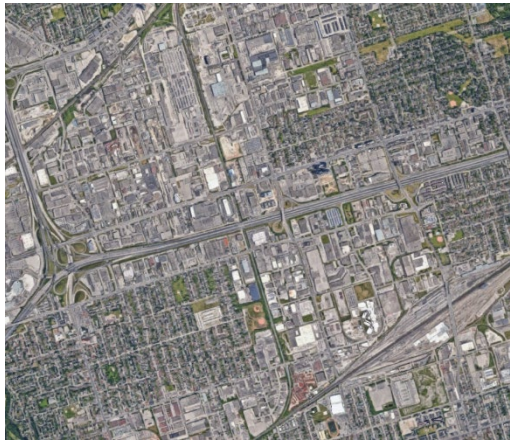
¹⁷ Figure 2 of ROP: Strategic Employment Lands: <https://www.york.ca/wps/wcm/connect/yorkpublic/3593534d-0b45-4d74-91c1-01913fe0201c/yropOfficeConsolidationFigure2Accessible.pdf?MOD=AJPERES>

¹⁸ York Region Vacant Employment Land Inventory: <https://www.york.ca/wps/wcm/connect/yorkpublic/faa33468-b3c9-464a-9676-10be05613f20/mar+22+vacant+ex.pdf?MOD=AJPERES>

County of Simcoe						
Major Employment Areas	Hierarchy of Employment Lands	Access to Transportation Infrastructure	Access to Inter-Regional Economic Markets	Significant Scale and Cluster of Economic Output	Flexibility of Land Use Patterns	Recognition and Protection within Land Use Planning
  	<ul style="list-style-type: none">• Yes—hierarchy of employment lands identified in Amendment to the Growth Plan in 2013 through the introduction of the Simcoe Sub-Area policies• Growth Plan identifies and prioritizes Strategic Settlement Employment Areas and Economic Employment Districts• Employment areas identified in the Growth Plan:<ul style="list-style-type: none">◦ <i>Bradford West Gwillimbury strategic settlement employment area</i>◦ <i>Innisfil Heights strategic settlement employment area</i>◦ <i>Lake Simcoe Regional Airport economic employment district</i>◦ <i>Rama Road economic employment district</i>• One employment area identified as Provincially significant<ul style="list-style-type: none">◦ Aliston Employment Area (Honda Manufacturing)	<ul style="list-style-type: none">• Yes—Strategic location along Highway 400, between GTHA and northern Ontario/link to western Canada• Multiple rail corridors serve various major employment areas• Direct rail access to major manufacturing facilities/employment areas• Close proximity to Pearson International Airport• Highway 400• CP/CN rail corridors	<ul style="list-style-type: none">• Honda Manufacturing Plant (identified as PSEZ) serves Canada-wide market for automobiles/engine manufacturing• Major highways and railways connected to continent wide networks	<ul style="list-style-type: none">• Honda Assembly Plant – supports significant scale of employment and other employment uses/businesses	<ul style="list-style-type: none">• Majority of major employment areas greater than 80 hectares in size• Parcel sizes are large, range from 1.5 to >10 hectares in size• Various zoning and OP designations which permit range of industrial/manufacturing and office uses• Some employment areas (particularly strategic employment areas identified in the Growth Plan) are largely vacant – represent greenfield opportunities to support future employment growth over the planning horizon of the Plan• Employment areas are located away/buffered from sensitive land uses (e.g. residential uses) and are relatively not impact by environmental constraints	<p>Section 3.9 Strategic Employment Areas and Economic Employment Areas</p> <p>Specialized employment opportunities are provided for in the Strategic Settlement Employment Areas and Economic Employment Districts.</p> <p>Plan recognizes two strategic settlement employment areas and two economic employment districts within the County:</p> <ul style="list-style-type: none">• Lake Simcoe Regional Airport Economic Employment District; and• Rama Road Economic Employment District• Innisfil Heights Strategic Settlement Employment Area; and• Bradford West Gwillimbury Strategic Settlement Employment Area <p>3.9.5 In the directive issued by the Minister of Infrastructure, the boundaries and appropriate uses permitted in the strategic settlement employment areas and the economic employment districts are detailed and may be reviewed and amended from time to time or at the request of the local municipalities.</p> <p>3.9.6 The strategic settlement employment areas and the economic employment districts are identified on Schedule 5.1.2 to this Plan and the boundaries as determined by the Minister of Infrastructure are shown on Schedule 5.1. The local municipalities in which they are located will delineate the location and boundaries in their official plans and develop official plan policies to implement the matters detailed in the directive issued by the Minister of Infrastructure including but not limited to permitted uses.</p> <p>3.9.7 Lands within the strategic settlement employment areas and economic employment districts are considered designated Greenfield area and subject to the density target of the respective local municipality.</p> <p>3.9.8 The local municipalities shall identify and protect the natural heritage systems, natural features and functions within the strategic settlement employment areas and economic employment districts.</p>




City of Hamilton						
Major Employment Areas	Hierarchy of Employment Lands	Access to Transportation Infrastructure	Access to Inter-Regional Economic Markets	Significant Scale and Cluster of Economic Output	Flexibility of Land Use Patterns	Recognition and Protection within Land Use Planning
  	<ul style="list-style-type: none">• Yes—specific employment areas identified in Urban Hamilton Official Plan (UHOP)• Secondary Plans/specific policies contained in UHOP for West Hamilton Innovation District and Airport Economic Growth District (AEGD); identified as significant and of higher significance than other employment areas• Total of three employment areas identified as provincially significant:<ul style="list-style-type: none">◦ Hamilton Centre◦ Hamilton Port/QEW◦ Hamilton Airport	<ul style="list-style-type: none">• Yes—nearly all major employment areas in Hamilton have direct access to either a major highway, railway corridor or shipping port; major transportation facilities are listed below:<ul style="list-style-type: none">• Port of Hamilton• Access to multiple rail corridors• Highway 403• QEW Highway• Hamilton International Airport	<ul style="list-style-type: none">• Regional access to GGH and US markets through rail and highway network• Airport identified as significant international transportation linkage—businesses in proximity to airport have access to international market via air travel/cargo• Direct access to GTHA, Southern Ontario and US markets via Highways 403 and QEW• Opportunities for access to North American-wide rail system• International harbour/port focal point of central employment lands• Close proximity to Quebec and US markets	<ul style="list-style-type: none">• Yes – major hub and cluster of steel producing plants and ancillary employment uses along Port of Hamilton• Significant scale and cluster of shipping and navigation-related employment uses along Port of Hamilton	<ul style="list-style-type: none">• Yes – employment lands are of significant size of accommodate range of employment uses and adequately buffer from surrounding sensitive land uses• Parcel sizes are of a significant size to provide flexibility for employment uses; regular lotting pattern; provides a mix of parcel sizes and employment are types (e.g. business parks vs. industrial areas)• For example, lands in Hamilton Innovation District range from 0.1 to 6 hectares in size¹⁹• Lands surrounding Hamilton Airport largely vacant and planned for development through comprehensive secondary plan to ensure viability of employment lands and land use compatibility with surrounding areas	<p>Multiple employment area designations</p> <p>Industrial Land Designation</p> <ul style="list-style-type: none">• full range of manufacturing uses, warehousing, repair service, building or contracting supply establishments, building and lumber supply establishments, transport terminals, research and development, communication establishment, private power generation, dry cleaning plants, salvage/storage yards, and motor vehicle repair and wrecking; <p>Business Park Designation</p> <ul style="list-style-type: none">• manufacturing, warehousing, repair service, building or contracting supply establishments, building and lumber supply establishments, transportation terminals, research and development, office, communication establishment, and private power generation. Salvage yards and other uses which are unsightly or otherwise incompatible with the design policies and image for business parks shall be prohibited; <p>Airport Employment Growth District (AEGD)</p> <ul style="list-style-type: none">• is designed to provide for a major business park development which: effectively integrates with and complements the existing John C. Munro Hamilton International Airport; integrates with the residential development abutting Garner Road / Twenty Road; recognizes and permits certain existing land uses to continue until they are redeveloped; and respects and enhances prominent natural areas. The planned development includes 97 net developable hectares in the existing airport business park (within the current urban boundary).

¹⁹ <https://www.investinhamilton.ca/wp-content/uploads/2016/08/WHID-BusPark.pdf>

City of Toronto						
Major Employment Areas	Hierarchy of Employment Lands	Access to Transportation Infrastructure	Access to Inter-Regional Economic Markets	Significant Scale and Cluster of Economic Output	Flexibility of Land Use Patterns	Recognition and Protection within Land Use Planning
  	<ul style="list-style-type: none"> • Yes—identifies different scales/significance of employment areas through incorporation of “General” and “Core” employment areas (OPA 231 – still under appeal) • Core employment areas support traditional employment uses (i.e. manufacturing, warehousing, industrial) • General employment areas support broader mix of employment including offices, mix of retail/commercial ancillary uses • Total of 10 PSEZs identified: <ul style="list-style-type: none"> ○ 427 QEW ○ Pearson Airport Hub (Airport) ○ 400 407 (Highway 400 Corridor) ○ 400 407 (Keele Dufferin) ○ Toronto (Unilever Eastern) ○ 404 407 (Markham, Richmond Hill and Toronto) ○ Canadian Pacific (North) ○ Canadian Pacific (South) ○ 404 407 (Milliken) ○ Pearson Airport Hub (Hwy 50 Corridor) 	<ul style="list-style-type: none"> • Yes—City centrally located within GGH; • all major employment areas in Toronto have direct access to either a major highway or railway corridor • Close proximity to international airport; multimodal facilities; port lands; 400-series highways • major transportation facilities are listed below: <ul style="list-style-type: none"> • Highway 404 • Highway 400 • Highway 401 • Highway 427 • Gardiner Expressway • Don Valley Parkway • Multiple CP/CN rail corridors and rail yards • Toronto Port/Portands 	<ul style="list-style-type: none"> • Direct access to Windsor-Quebec corridor via Highway 401 • Direct access to GTHA and Southern Ontario markets via Highways 401, Gardiner Expressway, DVP/Hwy 404, Hwy 400 and 407 • Opportunities for access to North American-wide rail system • Close proximity to Quebec and US markets (approx. 110 kilometres to US border, or 1.5 hour drive) 	<ul style="list-style-type: none"> • As of 2015, 337,701 full time jobs are located in the City's Employment Areas²⁰ • Employment areas support regional and international market demands; several world/regional headquarters are located throughout the City's employment areas (e.g. food and beverage manufacturing) • Employment areas support significant share of manufacturing sector employment, comprising approximately a third of Employment Area employment; manufacturing makes up only 1% of employment in the rest of the city 	<ul style="list-style-type: none"> • Approximately 8,000 hectares of land designated for employment area use City-wide²¹ • Broadening range of permitted uses in Core and General Employment Areas; particularly around major transit station areas with the opportunity to attract more office employment uses • General employment area serves as buffer for core employment area – added protection for manufacturing uses and mitigates compatibility issues 	<ul style="list-style-type: none"> • Yes—OPA 231 defines Employment Areas, which are comprised of both Core Employment Areas and General Employment Areas. • Employment Areas are areas designated in this Plan for clusters of business and economic activities including, but not limited to, manufacturing, warehousing, offices, and associated retail and ancillary facilities; areas will be used exclusively for business and economic activities in order to: <ul style="list-style-type: none"> ○ retain sufficient availability of lands, for both current and future needs, for industrial functions such as manufacturing and warehousing which are permitted only within Employment Areas and Regeneration Areas; ○ protect and preserve Employment Areas for current and future business and economic activities.



²⁰ <https://www.toronto.ca/legdocs/mmis/2017/pg/bgrd/backgroundfile-107360.pdf>

²¹ <https://www.toronto.ca/legdocs/mmis/2017/pg/bgrd/backgroundfile-107360.pdf>

City of Windsor						
Major Employment Areas	Hierarchy of Employment Lands	Access to Transportation Infrastructure	Access to Inter-Regional Economic Markets	Significant Scale and Cluster of Economic Output	Flexibility of Land Use Patterns	Recognition and Protection within Land Use Planning
  	<ul style="list-style-type: none">• Yes – Official Plan recognizes employment lands through industrial and Business Park designations• Official Plan also recognizes “Future Employment Area” under Section 6.13• The Future Employment Area designation is intended to accommodate future Industrial and Business Park designations• The Official Plan also requires a high standard of architectural and landscape design for Industrial and Business Park designations adjacent to the Highway 401 corridor given its visibility along an international gateway	<ul style="list-style-type: none">• Yes – employment lands well-connected to regional transportation networks• Majority of employment lands are located within close proximity (approx. 2 km) of a range of major highway, rail, harbour and air transportation networks including those with direct international connections to the United States• major transportation facilities are listed below:<ul style="list-style-type: none">• Highway 401• E.C. Row Expressway• Windsor International Airport• CN rail corridors• Windsor Port Authority Lands• Michigan Central Rail Tunnel• Detroit-Windsor Bridge	<ul style="list-style-type: none">• Direct access to Windsor-Quebec corridor via Highway 401• Direct access to GTHA and Southern Ontario markets via Highways 401, 402 and 403• Relatively isolated to the rest of Ontario/Canada compared to other Southern Ontario Municipalities• Conversely, Windsor has one of the closest proximities to a large international market with the United States with various highway, tunnel and rail connections to the City of Detroit• Windsor strategically located within 4.5 hour drive to numerous large North American cities including Chicago, Detroit, Toronto, Columbus, Pittsburgh, Buffalo, etc.	<ul style="list-style-type: none">• Strong growth of employment-related investment with approx. \$94-million of new investment in the region, through both public and private investment streams (2018)²²• Employment areas support regional and international market demands; employment areas are key to supporting cross-border trade with the United States	<ul style="list-style-type: none">• Significant supply of vacant employment lands in Windsor, including the new supply of business parks and future employment lands in the Sandwich South Area of Windsor designated in OPA No. 60 provides of employment lands to accommodate projected employment growth for the 20 year planning period• Most recently available data shows the overall average employees per hectare factor for employment lands is approximately 22.6²³• Range in employment land parcel size throughout the City including larger industrial parcels (10-15 ha) and smaller business/office-oriented parcels located in proximity to the airport (0.5-2 ha)	<ul style="list-style-type: none">• Yes—Employment lands identified under Section 6.4 of the City’s Official Plan: <i>Employment lands provide the main locations for business and industrial activities. In order to strengthen Windsor’s economy, meet the land and infrastructure needs of employment activities and address concerns over compatibility, employment land uses are provided under two designations on Schedule D as either Industrial or Business Park.</i>• Future Employment Areas are protected from redesignation under Section 6.13 of the Official Plan, stating “<i>redesignation or development of Future Employment Areas shall require completion of Secondary Plans and other appropriate studies relating to physical servicing, transportation, Class Environmental Assessment or others as required by this Official Plan</i>”

²² http://choosewindsorsex.com/sites/default/files/files/AnnualReport_2018_WEB.pdf

²³ <https://www.citywindsor.ca/residents/planning/Plans-and-Community-Information/Official-Plan-Review/Documents/OPR%202020-Year%20Employment%20Projections%20and%20Employment%20Land%20Needs%20Analysis.pdf>

City of Sarnia						
Major Employment Areas	Hierarchy of Employment Lands	Access to Transportation Infrastructure	Access to Inter-Regional Economic Markets	Significant Scale and Cluster of Economic Output	Flexibility of Land Use Patterns	Recognition and Protection within Land Use Planning
 	<ul style="list-style-type: none"> • Yes—Sarnia's Official Plan identifies the "Petrochemical Complex" as a significant employment area that is distinctive from other employment areas • The Petrochemical Complex is recognized as an internationally important cultural heritage landscape rooted in petro-chemical production and innovation. The City of Sarnia encourages the preservation and adaptive reuse of culturally significant elements of the industrial landscape, including Horton Spheres, administration and research buildings, and power plants 	<ul style="list-style-type: none"> • Yes – employment lands well-connected to regional transportation networks • Majority of employment lands are located within close proximity (approx. 2 km) of a range of major highway, rail, harbour and air transportation networks including those with direct international connections to the United States • major transportation facilities are listed below: <ul style="list-style-type: none"> • Highway 402 • E.C. Row Expressway • Windsor International Airport • CN rail corridors • Windsor Port Authority Lands • Michigan Central Rail Tunnel • Detroit-Windsor Bridge 	<ul style="list-style-type: none"> • Direct access to Windsor-Quebec corridor via Highways 402 and 401 • Direct access to GTHA and Southern Ontario markets via Highways 401, 402 and 403 • Relatively isolated to the rest of Ontario/Canada compared to other Southern Ontario Municipalities • Similar to Windsor, Sarnia has one of the closest proximities to a large international market with the United States with various highway, tunnel and rail connections to Port Huron, Michigan 	<ul style="list-style-type: none"> • Sarnia's Petrochemical and Refining Complex is the second largest cluster of companies in the petrochemical and refining sector²⁴ • Today, the Complex includes three refineries and more than thirty-five interrelated chemical facilities with various processes utilized across the industry • Employment areas support regional and international market demands; employment areas are key to supporting cross-border trade with the United States 	<ul style="list-style-type: none"> • Employment areas provide a land base for a wide range of non-retail business and economic activities, and ancillary uses. Employment areas shall be protected in order to meet current and future employment growth needs • The airport provides a secure land base for the municipal airport and airport-related employment uses of various sizes and scales 	<ul style="list-style-type: none"> • Yes—Official Plan recognizes employment areas under section 4.7: <p><i>Employment areas shall be protected, maintained and improved for non-retail employment functions over the long term. Uses that support this direction consist of manufacturing, offices, warehousing, distribution, research and development facilities, utilities and retail outlets ancillary to the preceding uses.</i></p> <p><i>The City favours the development of eco-industrial development where occupants seek to minimize or eliminate waste generation, energy use, and other environmental impacts through symbiotic arrangements with other facilities.</i></p> <p><i>Within employment areas, restaurants and small-scale shops and services that mainly serve area businesses and workers may locate on Arterial and Collector roads only</i></p>

²⁴ <https://33sgq1wqdn71n18qv11fgblh-wpengine.netdna-ssl.com/wp-content/uploads/2019/11/SLEP-Petrochemical-and-Refining-Complex-Booklet.pdf>

Appendix D

Assessment of Niagara Region's employment areas

Appendix D: Assessment of Niagara Region’s Employment Areas (please refer to the attached map for Employment Area references)

Map # - (Code) Municipality	Employment Area	Designated for Employment Uses	Access to Transportation Infrastructure	Access to Inter-Regional Economic Markets	Significant Scale of Economic Output	Flexibility of Land Use Patterns
		Identified and protected within Local Area Official Plans	Close proximity (within 2 km) of 400-series highway, airport, access to rail corridor and/or canal	Serves regional/ international market needs; source of inter-regional trade	Supports range of employment uses; significant employment generator	Adequately buffered from residential /environmental constraints; large, rectangular lots
(1) Fort Erie	Stevensville Industrial Park	✓	✓	✗	✗	✗
(2) Fort Erie	Fort Erie Industrial Park	✓	✓	✓	✓	✓
(3) Grimsby	Grimsby West Employment Area	✓	✓	✓	✗	✓
(4) Grimsby	Grimsby East Employment Area (D)	✓	✗	✗	✗	✗
(5) Lincoln	Beamsville Industrial Park	✓	✓	✓	✗	✓
(6) Lincoln	Lincoln King Street/Bartlett Road Employment Area	✓	✗	✗	✗	✗
(7) Niagara Falls	Niagara Falls Highway 405 Employment Area	✓	✓	✓	✗	✗
(8) Niagara Falls	North Niagara Falls Secure Storage Employment Area	✓	✓	✓	✗	✗
(9) Niagara Falls	Niagara Falls QEW/420 Employment Area	✓	✓	✗	✗	✓
(10) Niagara Falls	Niagara Falls QEW Centre Employment Area	✓	✓	✗	✗	✗
(11) Niagara Falls	South Niagara Falls Employment Area	✓	✓	✓	✓	✓
(12) Niagara Falls	Niagara Falls Dorchester Road Employment Area	✓	✗	✗	✗	✗
(13) Niagara Falls	Niagara Falls Stanley Avenue and Chippawa Parkway Employment Area	✓	✗	✗	✓	✓
(14) Niagara-on-the-Lake	Glendale Employment Area	✓	✓	✓	✓	✓
(15) Niagara-on-the-Lake	Niagara-on-the-Lake Virgil Employment Area	✓	✗	✗	✗	✓
(16) Port Colborne	West Port Colborne Employment Area	✓	✓	✓	✓	✓
(17) Port Colborne	East Port Colborne Employment Area	✓	✓	✓	✓	✓
(18) St. Catharines	St. Catharines Port Weller Employment Area	✓	✗	✓	✗	✓
(19) St. Catharines	Eastchester Employment Area	✓	✓	✓	✓	✓
(20) St. Catharines	St. Catharines QEW Centre Employment Area	✓	✓	✗	✗	✓

Map # - (Code) Municipality	Employment Area	Designated for Employment Uses	Access to Transportation Infrastructure	Access to Inter-Regional Economic Markets	Significant Scale of Economic Output	Flexibility of Land Use Patterns
		Identified and protected within Local Area Official Plans	Close proximity (within 2 km) of 400-series highway, airport, access to rail corridor and/or canal	Serves regional/ international market needs; source of inter- regional trade	Supports range of employment uses; significant employment generator	Adequately buffered from residential /environmental constraints; large, rectangular lots
(21) St. Catharines	St. Catharines QEW West Employment Area	✓	✓	✓	✗	✗
(22) St. Catharines	St. Catharines Louth Employment Area	✓	✓	✗	✓	✓
(23) St. Catharines	St. Catharines Welland Canal Employment	✓	✓	✓	✓	✓
(24) Thorold	Thorold Brock Park Employment Area	✓	✓	✓	✗	✓
(25) Thorold	Thorold McCleary Drive Employment Area	✓	✓	✗	✗	✗
(26) Thorold	Thorold Highway 58 Employment Area	✓	✓	✗	✗	✗
(27) Thorold	Thorold Welland Canal Employment Area	✓	✓	✓	✓	✓
(28) Welland	Welland 406 Employment Area	✓	✓	✓	✓	✓
(29) Welland	West Welland Employment Area	✓	✓	✓	✓	✓
(30) Welland	East Welland Employment Area	✓	✓	✓	✗	✗
(31) West Lincoln	West Lincoln Employment Area	✓	✗	✗	✗	✗

Appendix E

Workshop presentations and workbooks

Region of Niagara

EMPLOYMENT AREA STRATEGY INDUSTRY STAKEHOLDERS WORKSHOP

MHBC Planning
White Oaks Resort and Spa, NiagaraOn-The-Lake
Thursday, October 10, 2019



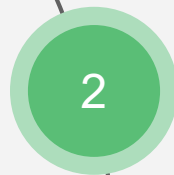
Workshop Agenda and Timeline

What we'll be covering and what we hope to achieve



Work plan and background

Overview of previous work done and our approach to the Strategy



What are employment areas?

Define their characteristics and both physically and from a policy perspective



Best practices research

Physical characteristics and policy approaches to employment areas across Southern Ontario



Niagara's Employment Areas

Our research and assessment of Niagara Region's employment areas



Discussion Session

Discussion and feedback on our work-to-date, other areas to consider, and next steps

A photograph of a large steel arch bridge spanning a body of water. A semi-truck with a white trailer is crossing the bridge. The bridge has multiple arches and is supported by concrete piers. The background shows a city skyline and some industrial buildings. The image is overlaid with a green tint.

1. Work plan and background

Purpose of the Strategy

Identifying, planning for and protecting Niagara's employment areas

Developing a comprehensive policy framework is crucial to the Region's long-term economic health and vitality. The goal of the Strategy is to align the Region with new Provincial policy while leveraging strategic benefits such as location, transportation and trade to support future employment uses in a rapidly changing environment.

The Strategy sets out to achieve four key goals:

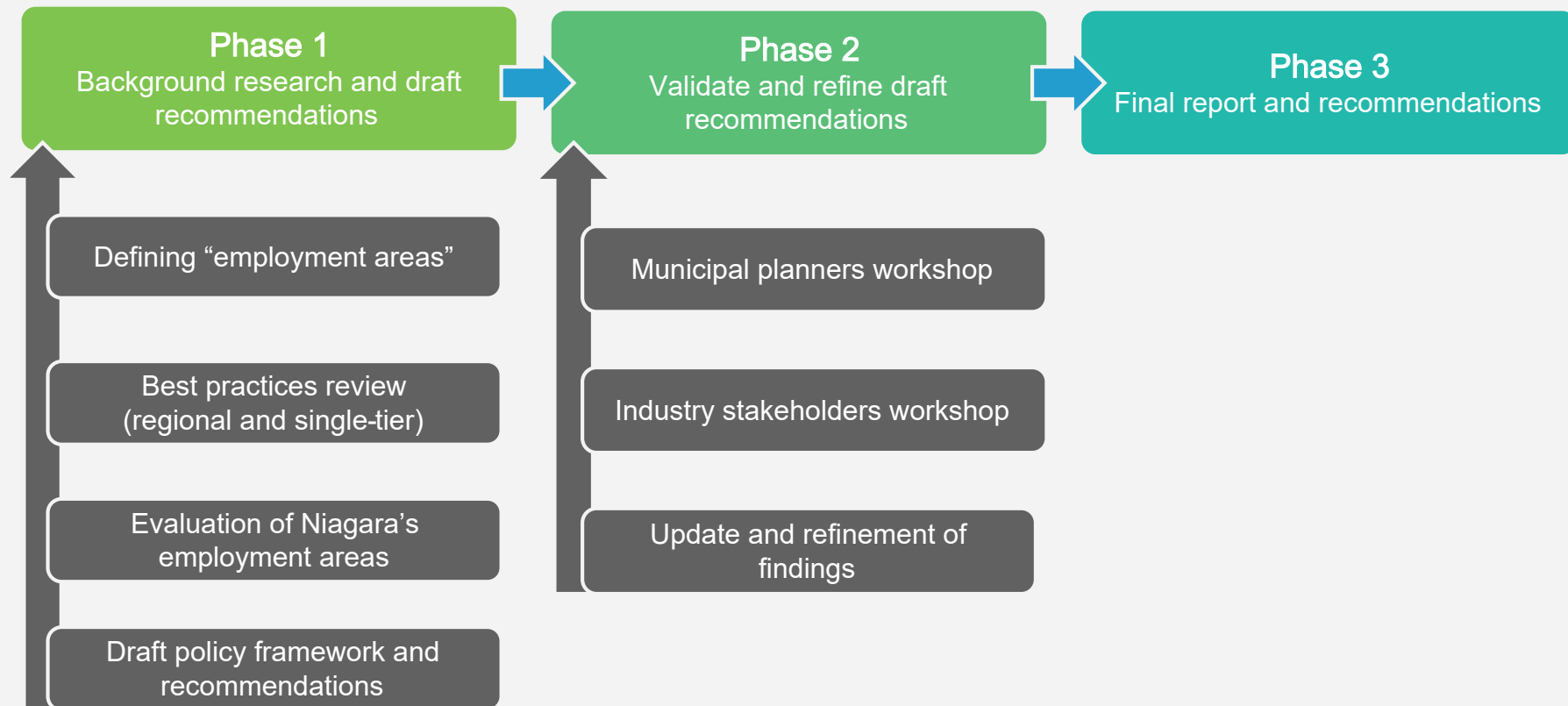
1.
Define
Employment
Areas

2.
Identify
Common
Characteristics

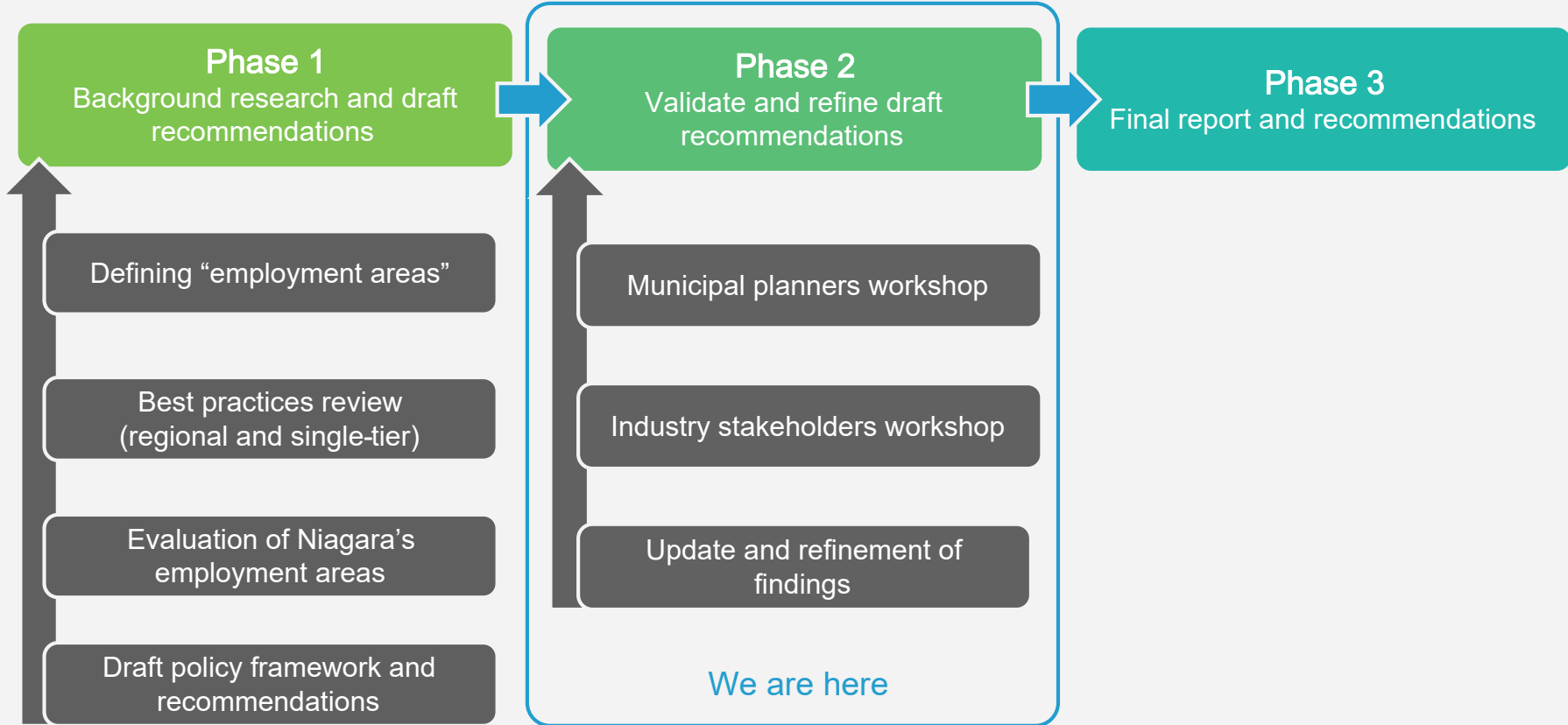
3.
Evaluate
Niagara's
Employment
Areas

4.
Provide Strategic
Policy Direction

Our Work Plan



Our Work Plan – Where We Area



Timeline of Previous Work

Taking a look at a changing policy landscape and how we got here



**PROVINCIAL
POLICY CHANGES**



**REGIONAL
PROCESSES**



**REGIONAL STUDIES
AND REPORTS**



**STAKEHOLDER
COLLABORATION**



2. What are employment areas?

What are Employment Areas?

On the Ground

- Need to recognize current employment land and jobs within different categories
- Distinction between “traditional” employment (e.g. manufacturing/warehousing, major offices and corporate headquarters) and “population-based” employment (hospitals, universities, service and retail)

Policy Framework

- Recognize that “employment areas” are treated differently in policy
- In Ontario, there is a specific process for how employment areas are identified, what types changes can occur (i.e. conversion), and how changes can occur (i.e. MCR)

Industrial Areas



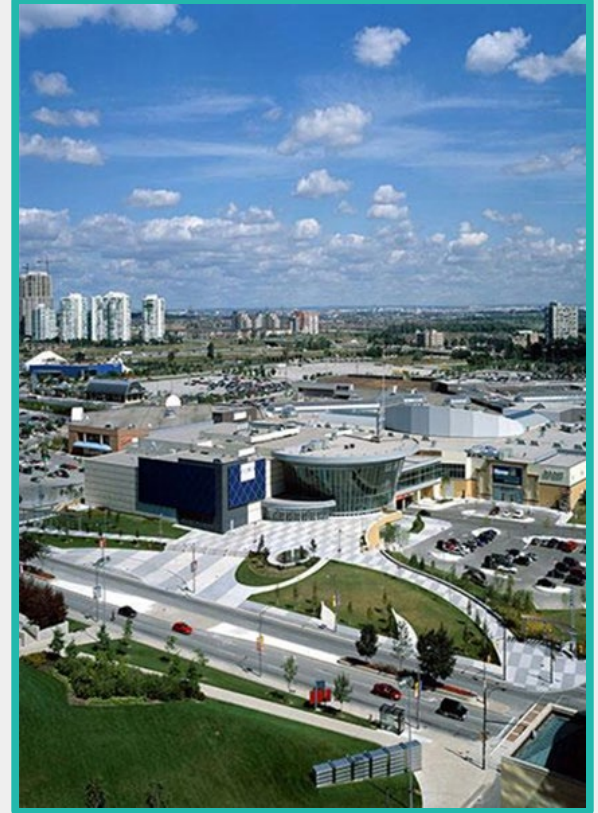
Business and Office Parks

PDS 14-2020
Appendix 1
May 13, 2020
Page 94



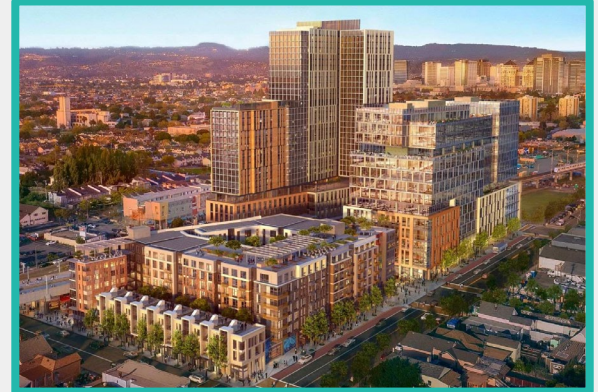
Commercial/Retail, Mixed -use Institutional Areas

PDS 14-2020
Appendix 1
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Page 95



Innovation Districts

PDS 14-2020
Appendix 1
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Page 96



The Policy Context

The framework surrounding planning for employment areas



The Provincial Policy Context

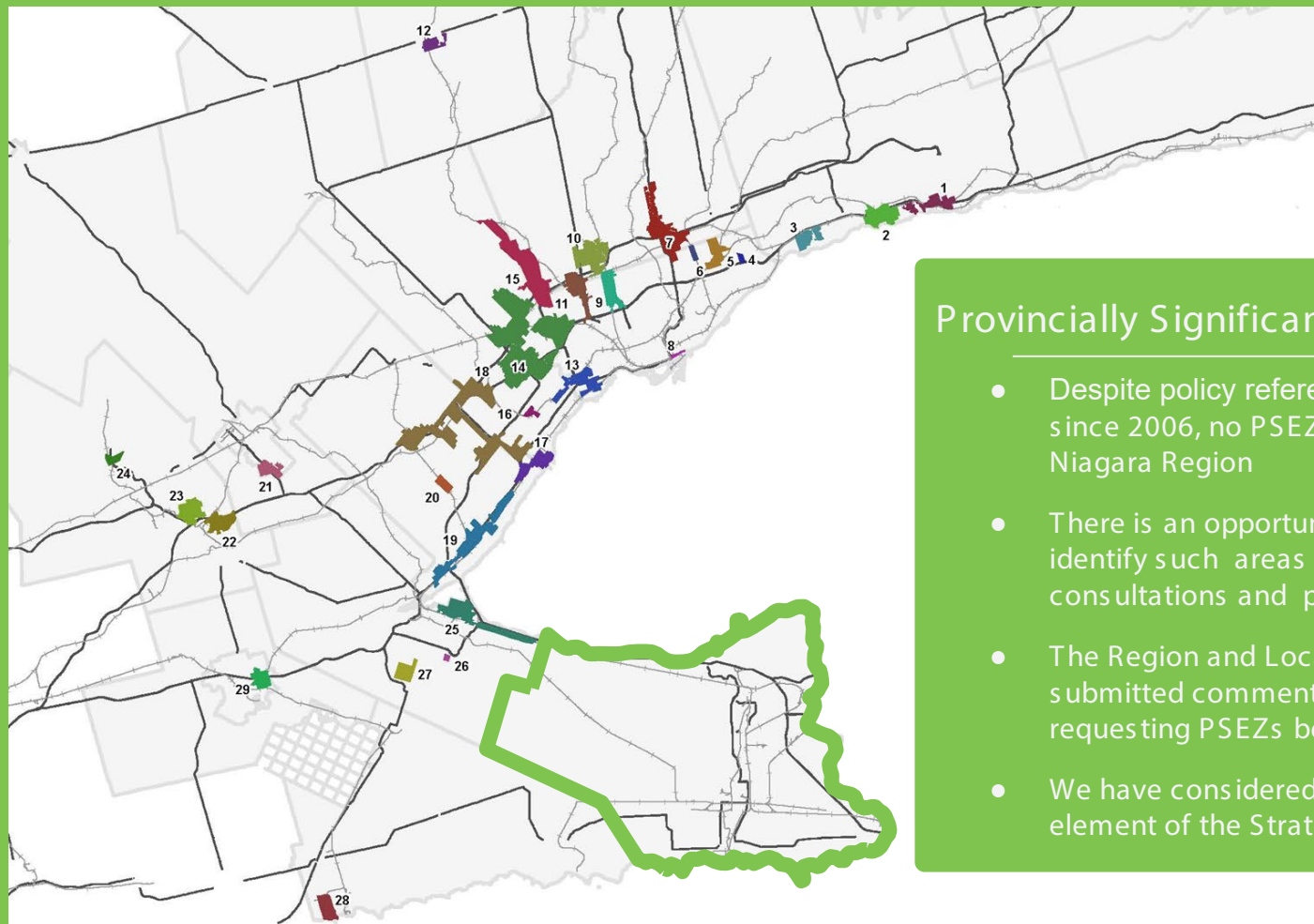
The framework surrounding planning for employment areas



Provincial

PPS/Growth Plan

- Defined as *"those areas designated in an official plan for clusters of business and economic activities including, but limited to, manufacturing, warehousing, offices, and associated retail and ancillary facilities"*
- Employment forecasts/land supply
- Growth targets
- Land use compatibility
- Conversions

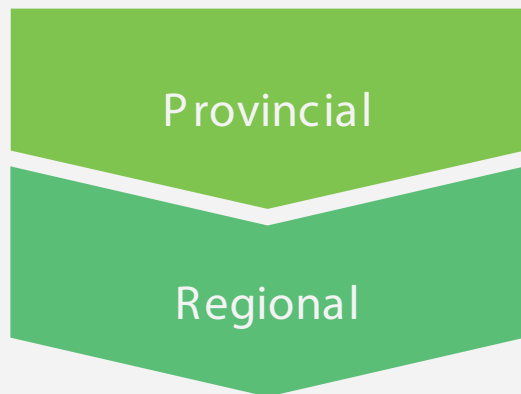


Provincially Significant Employment Zones

- Despite policy references in the Growth Plan since 2006, no PSEZ are currently identified in Niagara Region
- There is an opportunity for the Region to identify such areas through future consultations and processes with the Province
- The Region and Local Municipalities have submitted comments to the Province requesting PSEZs be recognized in Niagara
- We have considered this framework as a core element of the Strategy

The Regional Policy Context

The framework surrounding planning for employment areas



Regional Official Plan (ROP)

- Applies across all 12 municipalities in Niagara
- Currently designates Economic Gateway, Employment Lands, Rural Employment Lands
- Informed by previous Gateway and Non-Gateway employment lands studies

The Local Policy Context

The framework surrounding planning for employment areas



Local Official Plans; Secondary Plans; Zoning By-laws

- Guiding land use documents for each of Niagara's 12 Local Area Municipalities
- Variation in terms of designation and specific policies related to employment areas/lands

3. Best practices research

An aerial photograph of a city, likely Chicago, showing a large highway interchange with multiple lanes and overpasses. The surrounding area includes various buildings, parking lots, and green spaces. The image is overlaid with a semi-transparent teal color.

Best Practices Research

How other municipalities across Southern Ontario approach employment areas



Scope

Upper-tier municipalities (Simcoe, York, Durham, Halton, Peel, and Waterloo)

Single-tier municipalities (Hamilton and Toronto)

Border municipalities beyond the GGH (Windsor and Sarnia)

Purpose

Comparative review of policy approaches as well as the physical/land use characteristics of other employment areas in other regions

Better understand how Niagara's employment areas compare within a broader regional context

Methodology

Review of Regional and Local Official Plans, Employment Area/Lands Strategies and other economic development strategies

Physical review of these municipalities' identified employment areas in terms of location, size, output etc.

Key Findings

Identify key policy approaches that other municipalities take

Identify key physical and land use characteristics that define strategic employment areas in Southern Ontario

Best Practices Research

How other municipalities across Southern Ontario approach employment areas

Recognize certain employment areas as strategic and/or significant

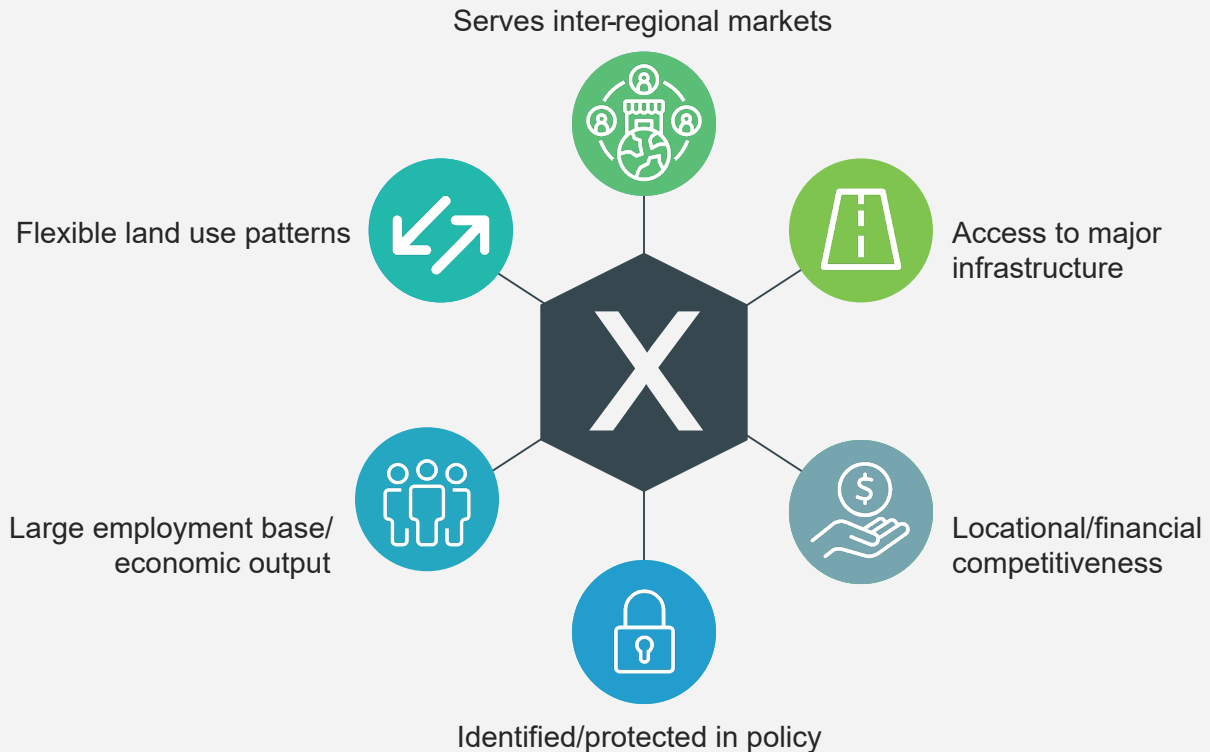
- Certain areas are strategic or have unique benefits due to location, size, employment base, type of employment, etc.
- Provide supportive policy framework for these areas with area-specific objectives/policies
- E.g. Airport Employment Growth District (Hamilton)

Identify and protect future strategic employment areas

- Employment areas that are designated but yet to be planned
- May be located outside of the built boundary, typically located adjacent to major transportation facilities
- Intended to accommodate employment area growth beyond 2041
- E.g. Future Strategic Employment Area overlay (Region of Halton)

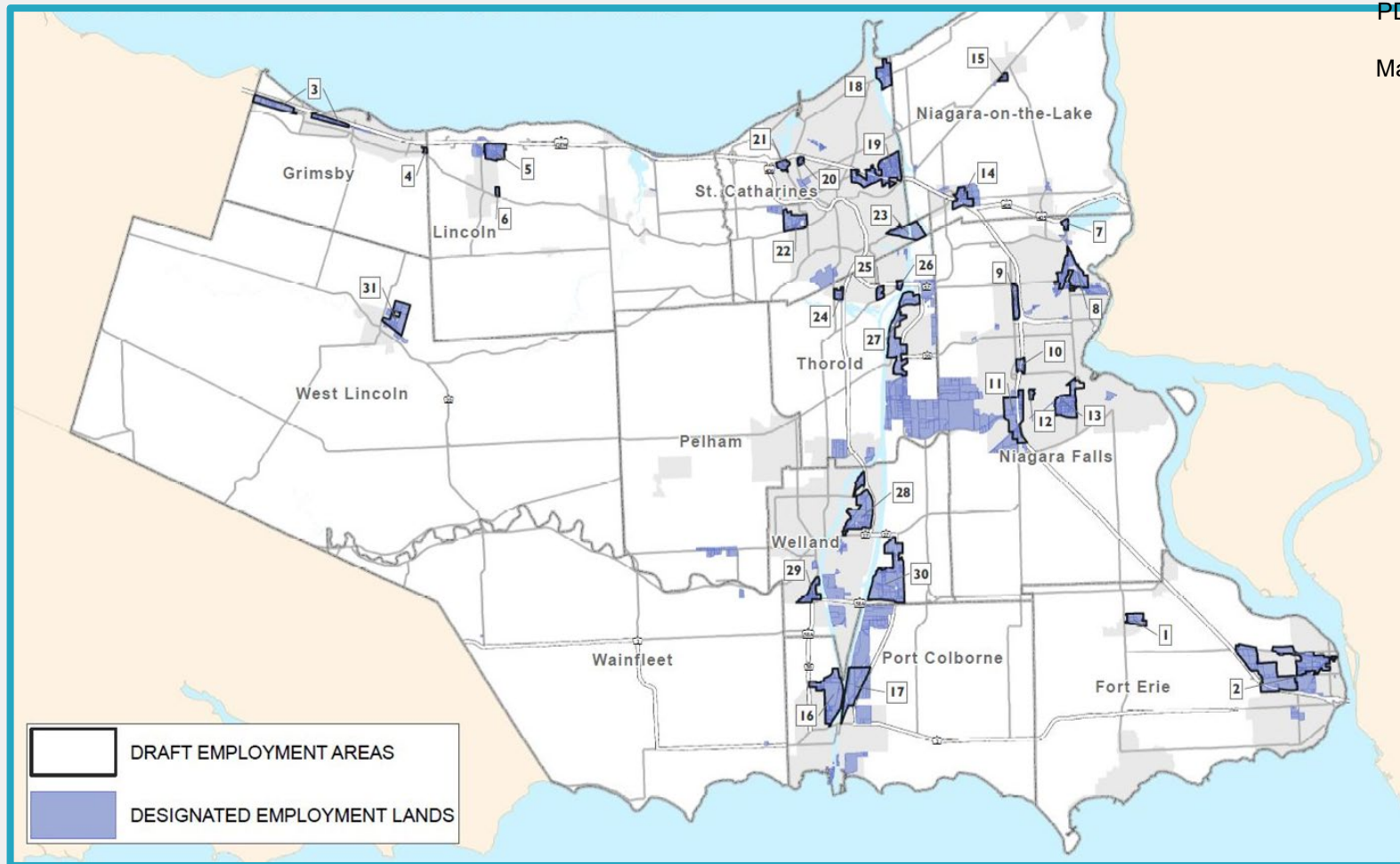
Criteria for Employment Areas

Based on a cross-jurisdictional review





4. Niagara's employment areas



Map of Niagara's Employment Areas

Assessing Niagara's Employment Areas

Our Work Process/Approach



Assessing Niagara's Employment Areas

Physical overview of existing conditions

- Total of 31 areas representing **3,587 hectares**
- Approx. **2,983 hectares** developable
- 68% are developed with **32% vacant**
- Average employment density of **21 jobs per hectare**
- Average building age of **30 years**
- 80% within **40 km** of a border crossing
- 80% within **2 km** of a highway interchange

Assessing Niagara's Employment Areas

S.W.O.T. analysis

- Excellent transportation access
- Proximity to border crossings
- Recognition of the "Gateway Corridor" in the Growth Plan
- Growth in manufacturing sector

S

- Relatively small and fragmented parcel sizes
- Many environmental constraints
- Building stock tends to be older
- Lack of major office spaces

W

- Vacant land available for expansion
- Expanded rail and canal access
- Planned infrastructure improvements and expansions

O

- No PSEZs currently identified in Niagara
- Existing residential uses within industrial/manufacturing areas

T

Applying Common Criteria

How do Niagara's employment areas compare?



Challenges for Employment Area Planning

- Adapting to a changing economy
- Urbanization
- Unserved land
- Conversion pressure
- Compatibility
- Others?



5. DISCUSSION SESSION

Question 1



What are the biggest challenges you face in relation to employment land planning and policies?

Question 2



Considering the 31 identified Employment Areas:

- Are there areas that are missing?
- Are there areas that should be modified?

Question 3

In defining “Employment Areas” as part of the Region’s Employment Area Strategy:

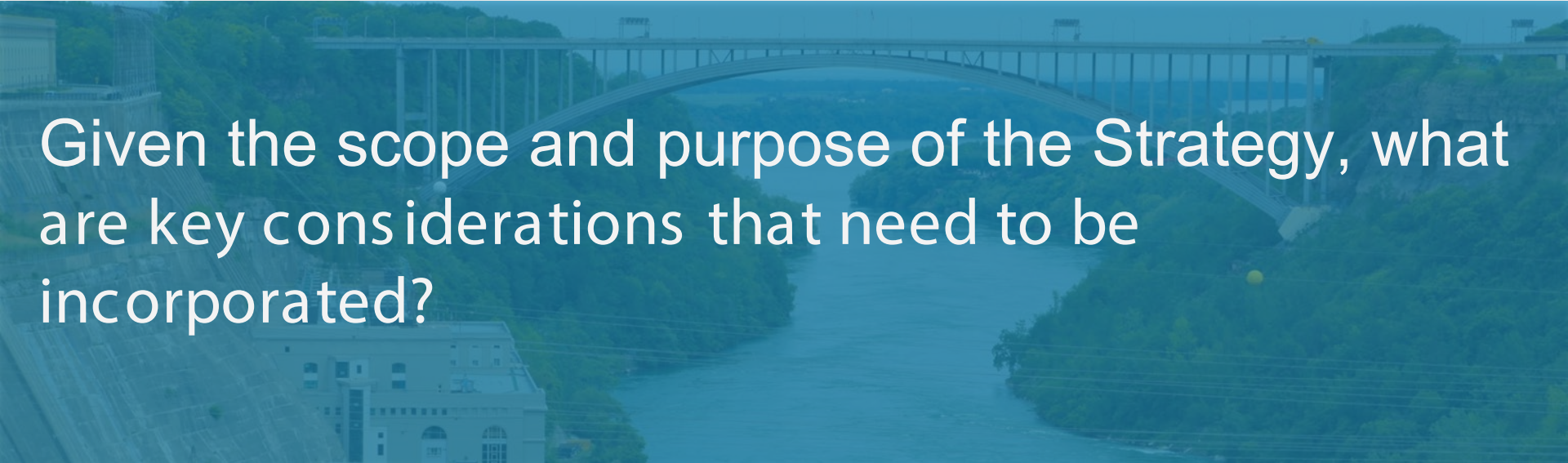
- Are the criteria useful?
- Are there other criteria that should be used?
- Should future strategic employment lands be included as employment areas assuming they meet criteria?

Question 4

How flexible or prescriptive should Employment Area policies be?

- What uses should be included as permitted uses that support employment?
- Should conversions require a regional review through an Official Plan Review process? Or, should a land use change be sufficient?

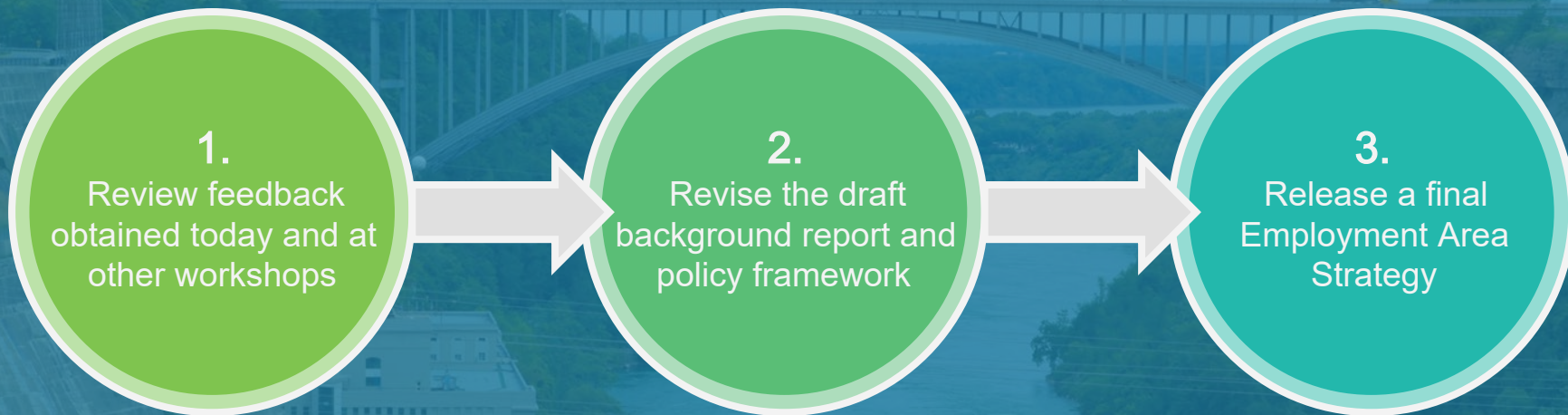
Question 5



Given the scope and purpose of the Strategy, what are key considerations that need to be incorporated?

Next steps

Towards the final Employment Area Strategy



Contact

Please feel free to take this package home with you for further thoughts and provide written comments to us by November 10.

**Dana Anderson
Hendren**

Partner, MHBC Planning
danderson@mhbcplan.com

Graham

Planner, MHBC Planning
ghendren@mhbcplan.com

Niagara  Region


MHBC
PLANNING
URBAN DESIGN
& LANDSCAPE
ARCHITECTURE

Thank you!



Niagara Region's Employment Area Strategy Workbook

Research Summary

Since December 2018, MHBC and urbanMetrics have worked in collaboration with the Region of Niagara to develop an Employment Area Strategy (the "Strategy"). Work to date includes a background report containing a preliminary assessment of the Region's employment areas in relation to other municipalities across the Greater Golden Horseshoe (GGH) and other border municipalities, and a draft policy framework and recommendations to ensure these areas are protected and enhanced over the long term to support existing and future employment-related activities.

The Strategy and supporting draft policy recommendations were developed by:

1. Specifying the functions of employment areas and noting the definitions and policies for employment areas and employment lands both physically and within the current land use planning framework;
2. Reviewing policy approaches to employment areas across the GGH and border municipalities, and identifying common characteristics; and,
3. Completing an assessment of the Region's past work on its employment areas and evaluating how identified employment areas within Niagara relate to the broader GGH contexts.

The Strategy assesses the current Employment Area planning policy framework at Provincial and Regional levels to determine how the existing physical Employment Areas within Niagara best fit within the framework. Findings and recommendations of the report will be refined through Phase 2 of the Strategy which will involve stakeholder input collected during workshops and interviews. A final report will be produced that includes a consultation summary and final policy framework to assist the Region in its implementation of the Strategy through an amendment to its existing Regional Official Plan (the "ROP").

A third phase of the Strategy will involve testing the implementation of draft policy recommendations. Work will involve identifying future employment areas and creating a concept plan that broadly defines potential employment clusters and nodes. The concept plan will use technical analysis to refine future employment area boundaries based on examining environmental, servicing, and transportation considerations.

Developing a comprehensive policy framework is crucial to the Region's long-term economic health and vitality. The goal of the Strategy is to align the Region with new Provincial policy while leveraging strategic benefits such as location, transportation and trade to support future employment uses in a rapidly changing environment.

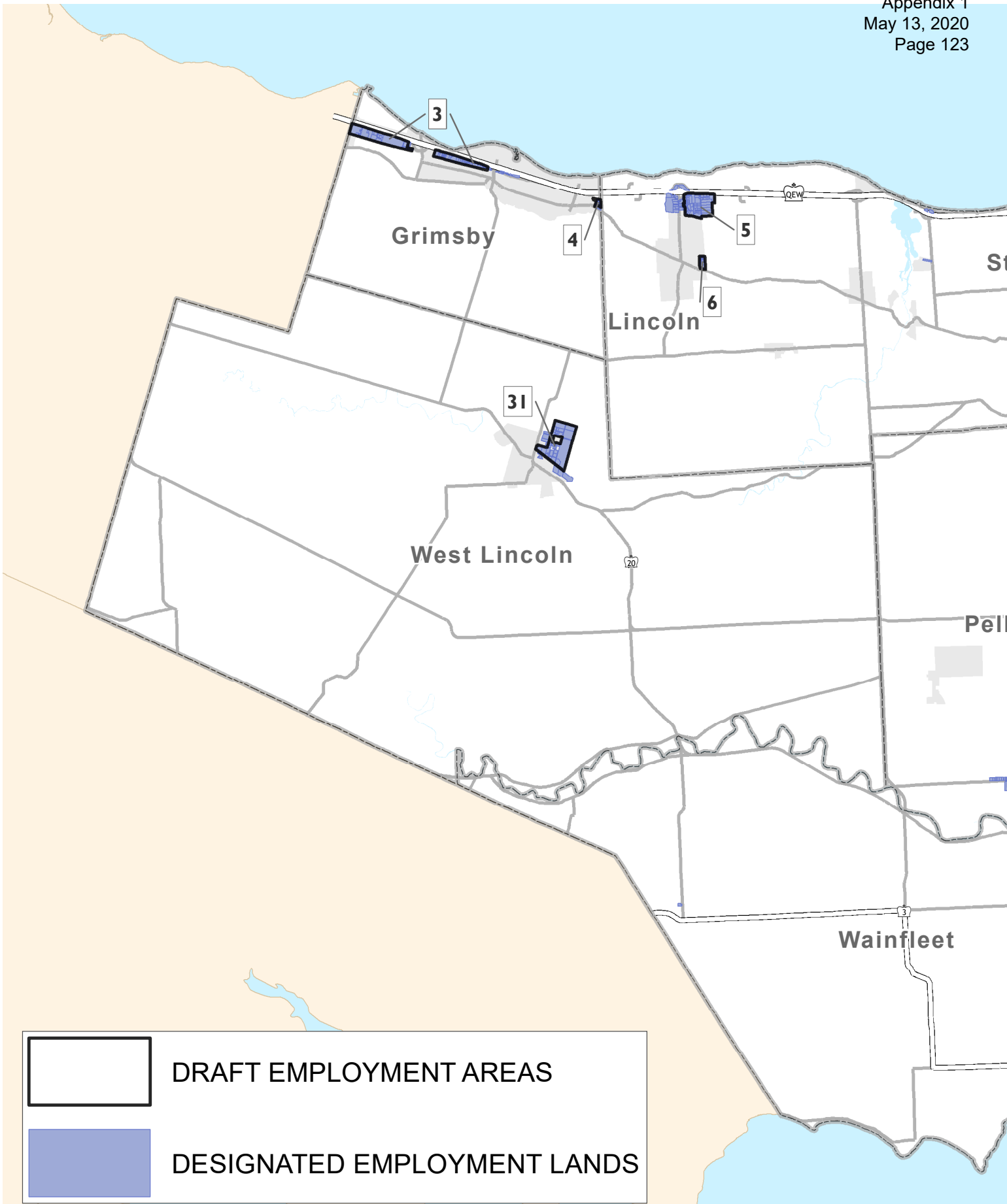
The Strategy sets out to achieve four key goals:

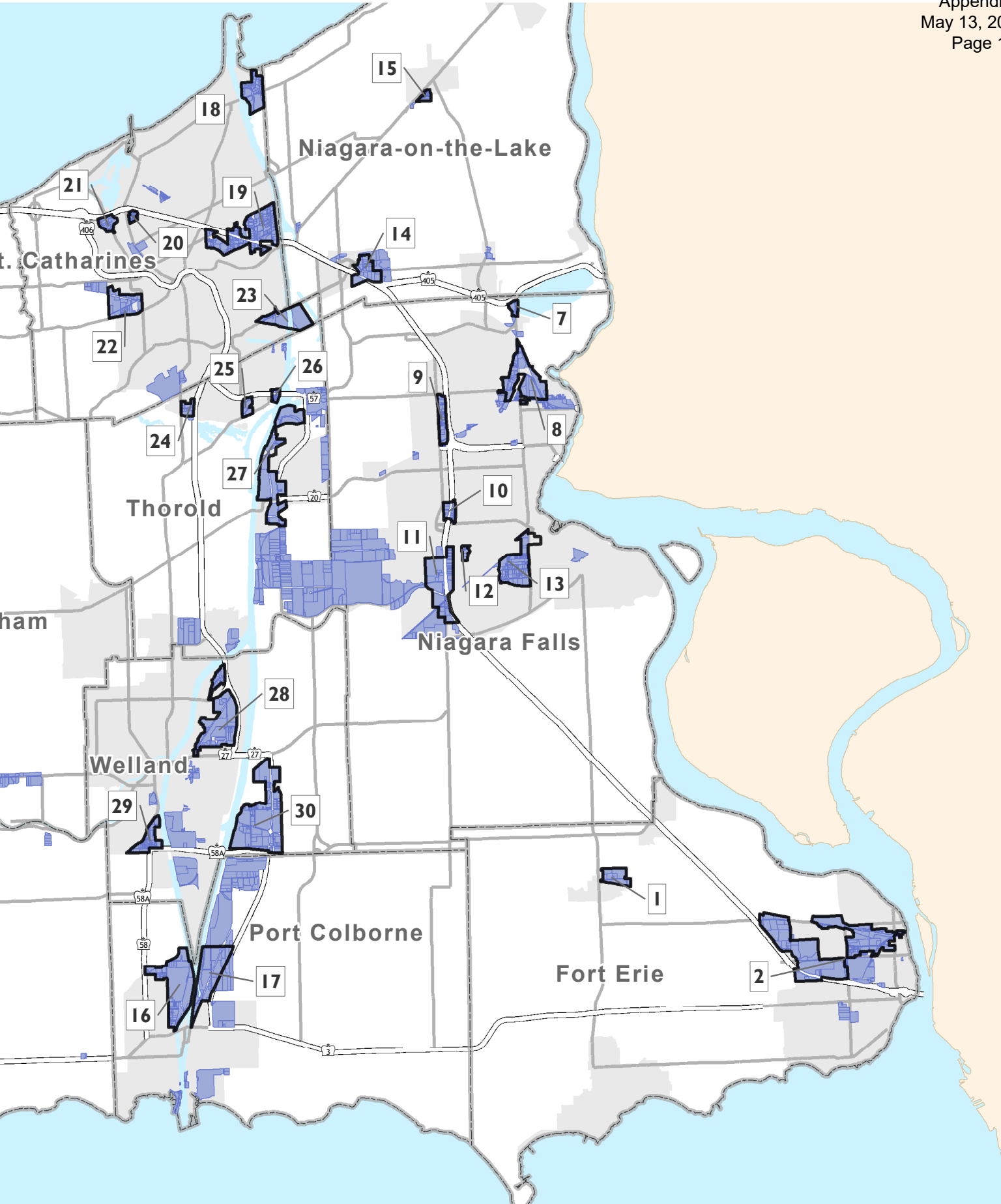
1.
Define
Employment
Areas

2.
Identify
Common
Characteristics

3.
Evaluate Niagara's
Employment
Areas

4.
Provide Strategic
Policy Direction





Discussion Question 1:

What are the biggest challenges you face in relation to Employment Area planning and policies?

Notes:

Discussion Question 2:

Considering the 31 identified Employment Areas:

- Are there areas that are missing?
- Are there areas that should be modified?

Notes:

Best Practice Findings - Characteristics of Employment Areas in the GGH

Large employment base/economic output

- Support and accommodate critical mass of employees, floor space and economic output
- Close proximity to other businesses in other industries
- Proximity to a highly skilled workforce

Flexible land use patterns

- Availability of large, contiguous blocks
- Maximize opportunities for a wide range for employment uses
- Compatibility/buffering with adjacent land uses

Serves inter-regional markets

- Support clusters of businesses that serve large markets
- Economic activities that have a regional/international significance
- Convenient access to border crossings to facilitate cross-border trade

Access to major infrastructure

- Proximity to major transportation facilities including 400-series highways, rail corridors, canals, airports, transit, etc.)
- Serviced by key infrastructure (water, wastewater, electricity, natural gas, fiber, etc.)

Locational/financial competitiveness

- Local development costs favourable for development
- Financial incentives to encourage business attraction, retention and expansion

Identified/protected in policy

- Supportive policy framework in place in local/regional official plans
- Protected from conversions and adjacent sensitive land uses that would threaten functioning of an employment area

Discussion Question 3:

In defining Employment Areas as part of the Region's Employment Area Strategy:

- Are the criteria useful?
- Are there other criteria that should be used?
- Should future strategic employment areas be included as employment areas assuming they meet criteria?

Notes:

Discussion Question 4:

How flexible or prescriptive should Employment Area policies be?

- What uses should be included as permitted uses that support employment?
- Should conversions require a Regional review through an Official Plan Review process? Or, should a land use change be sufficient?

Notes:

Discussion Question 5:

Given the scope and purpose of the Strategy, what are key considerations that need to be incorporated?

Notes:

Contact Us:

Please feel free to take this package home with you for further thoughts and provide written comments to us by November 10.

Dana Anderson

Partner, MHBC Planning
danderson@mhbcplan.com

Graham Hendren

Planner, MHBC Planning
ghendren@mhbcplan.com

Appendix F

Workshop feedback summary



MEETING NOTES

KITCHENER
WOODBRIDGE
LONDON
KINGSTON
BARRIE
BURLINGTON

NIAGARA REGION EMPLOYMENT AREA STRATEGY – WORK BOOK COMMENTS

Meeting: Industry Stakeholders Workshop
Date: Thursday, October 10, 2019
Time: 9:00 a.m. – 12 p.m.
Location: White Oaks Resort & Spa, Niagara-On-The-Lake

Attending: See attached sign in sheet

Absent: n/a

DISCUSSION FEEDBACK

Challenges faced by Industry Stakeholders:

- Comment that PSEZs aren't supported because it adds bureaucracy and too many layers of government involvement
- Inability to live where you work; the location of employment areas
- Slow timing of the MCR/conversion process
- Rigidity of employment area designations and making sure boundaries and permitted land uses are appropriate - difficult to make changes in the future
- Environmental limitations, lack of servicing; policy framework for each type of employment use (e.g. industrial use vs business vs innovation district)
- Need to make clear the types of land uses that are available/permitted in each employment area/across different local municipalities
- Opportunities for affordable housing near employment areas to support workers and closer live-work relationships
- Feedback and response is slow from governments and sometimes inconsistent – resulting in uncertainty for businesses
- Lack of land supply for employment uses
- Commercial real estate business facing challenges re: finding space – e.g. lack of flex office space in Niagara; no development of innovation districts taking place in Niagara and this type of employment area keeps being attracted to Toronto

Feedback on the identified employment areas:

- Suggestion to add in QEW corridor between fort Erie and Niagara Falls; add in Highway 406 corridor
- Establish a Brock Innovation Hub in Thorold adjacent to Brock University – potential for institutional partnership

Feedback on criteria for identifying employment areas:

- Access to infrastructure is highlighted in criteria, but we also need to consider “INSTITUTIONAL INFRASTRUCTURE” and the related assets that are needed to support employment
- Need to consider the impacts of changing of climate and use/vitality of employment uses (e.g. areas along Lake Ontario/Lake Erie may face changing coastlines)
- Need to consider brownfield status for conversion

Discussion on flexibility/prescriptiveness when approaching employment areas:

- Should be allowing conversions in the appropriate places but need to protect overall function of employment area
- Use provincial standards such as NPC 300 and D6 to allow interface between employment areas and sensitive land uses (e.g. residential uses)
- Flexibility is important – but there are areas that need more protection (e.g. core vs general designations in City of Toronto)
- Long term care facilities should be permitted in employment areas (e.g. near hospitals)
- Allow institutional uses in employment areas (esp. in innovation districts) – should allow student housing in these areas

Other considerations/comments on Employment Area Strategy:

- Need to have decision makers in room; obtain local and regional councillor buy-in
- Lands that are designated employment are often encumbered by environmental features – e.g. wood lot that has grown on land over course of 10 years should not impede development opportunities/require additional environmental studies that cost business time and money
- Lands on periphery of boundary of urban area should be considered for inclusion as employment areas
- In Fort Erie, there are issues related to wet lands but these environmental constraints need to be ground-truthed to determine what areas/lands are actually developable

WORK BOOK FEEDBACK/COMMENTS

What are the biggest challenges you face in relation to Employment Area planning and policies?

- Escarpment restrictions; need for future growth/expansion; support for long-term Niagara economic development (integrated campus – strategic); overlapping municipalities; spread out economic clusters of activity; funding constraints
- Escarpment restrictions
- Restrictive; Sometimes don't include “job creation” uses (WFH, flexible workspaces, less office space required, less warehouses); Time/process; Rigid designation; Boundary/Uses; Environmental
- Market demand for prestige office
- Sites are not large enough to attract/accommodate potential employers; access to transit is important; Sites must be close to urban centres; Presence of contaminants on site of previous employment lands – inherent legacy of remediation costs is problematic; Brownfields – liability, timing, costs; overgrowth of “natural environment” on vacant/under use portions of active properties – need for constant landscaping; employers need to be located close to affordable housing for employees; Feedback/response is slow from government and agencies – often inconstant too
- Time: revisions take 5-10 years (MCR); Provincial policy issue has final say; city buy-in? regional buy-in? Lengthy process; Difficult to keep up with residential growth; nature of job growth

residential growth; nature of job growth, residential vs job of employment; residential areas surrounding site; availability of space; clarity of options; environmental barriers; policy framework feasibility; servicing restrictions

- Time – too much time in between MCR; Processing time local land use review; time is money – studies take too long; too many layers – concern with added level of protection now with Province Zone designation; Inability to have people live close where they work
- Provincial policy:
 - Greenbelt
 - Environmental setbacks
- Lack of sizeable parcels; neighbouring constraints; lack of highway access/arterial roads; poor infrastructure – upfront costs; too many overlapping government interests; red tape – zoning too prescriptive, S.P.A too detailed; no incentives whatsoever

Considering the 31 identified Employment Areas: Are there areas that are missing? Are there areas that should be modified?

- “untouched” land use are that could have special designation? Opportunity for special economic zone = clean slate
- Is there a new “untouched” area to designate and protect?
- Yes – should leave for consultation; Look at clustering and locating along existing and planned infrastructure
- Greater consideration of GO Station Mixed Use potential and boundaries of employment areas; some municipalities have more than others + general mismatch of res/industry demand vs. supply; Having just seen the mapping today, it is hard for our table to comment on specifics
- There are a lot of prime locations for employment that are not designated employment (e.g. areas in close proximity to major highways); Agriculture is missing – would benefit to be included; Seaway Port Authority should be consulted for lands next to canal (e.g. Port Colborne); Climate and environmental impacts on properties needs to be considered (e.g. shorelines); Brownfield sites should be identified with level of contaminants/threats
- 406 and highway 20 needs to be considered; QEW corridor Fort Erie to Niagara Falls
- If Region is going to designate zone – make sure its designated properly and not encumbered by environmental features – ground be ready to develop; QEW corridor missing – busy corridor/crossing; 406 through Thorold – deficiency of lands with access to seaway
- Areas are too small and fragmented - See map – add areas along QEW north of Fort Erie; multiple locations along eastern side of canal from Port Colborne to St. Catharines

In defining Employment Areas as part of the Region’s Employment Area Strategy: Are the criteria useful? Are there other criteria that should be used? Should future strategic employment areas be included as Employment Areas assuming they meet criteria?

- Leveraging institutional infrastructure not mentioned; employment areas around rail/GO lines are a special consideration
- Access to infrastructure to include institutional infrastructure
- These are good/useful; Property status – contamination/clean; Access to major infrastructure should include institutional infrastructure (i.e. Brock University)
- Risk of getting designation wrong and being unable to move, adjust or convert if market doesn’t materialize; Additional concern that localized interests may need more so would support future designations; Make practical sense, but would need to be supported, encouraged by other programs and initiatives, strategies to make them worthwhile

- Impacts of a changing climate for employment sites/development (i.e. vulnerability); property condition status (i.e. contaminated, clean?); Floodplain mapping for future employment mapping
- Prioritize more/less desirable; institutional infrastructure to be considered
- Notion of prioritization – higher to lower

How flexible or prescriptive should Employment Area policies be? What uses should be included as permitted uses that support employment? Should conversion require Regional review through an Official Plan Review process, or should a land use change be sufficient?

- Not all industry/manufacturing/office/business/retail is the same; Introduce policies “where possible”; Many uses – retail; NPC-300; Uses – long-term care uses, student housing
- Need to reflect market demand and those conditions are changing faster than ever; Applications should be approved on merits, not stringent controls and regulations; Flexibility can sometimes add viability; As long as designations are sound and tested there’s less concern but rigid and costly restrictions can handcuff municipalities and developers for years unable to meet market needs
- Conversion of employment to residential will limit/reduce affordability of existing homes in the area; it’s important to have affordable housing close to employers
- Long-term care should be considered employment; living where you work option; let market influence demand (affordable housing); flexible with allowing conversions
- Long-term care should be empl. Use; live work flexibility; allow the market to influence development; conversions – flexibility to process anytime
- Flexibility is critical – land use choice sufficient

Given the scope and purpose of the Strategy, what are key considerations that need to be incorporated?

- Long-term strategic planning; how the lands are actually being used; thinking about adjacent lands and impacts on them
- Restrict/think lands adjacent to the defined lands
- Employment; Urban Boundary vs periphery – include as lands; Ratio: employment lands with wetlands – can’t use
- Adding more greenfield space for employment uses will not assist with revitalizing urban employment uses; the application process must be revamped; municipalities and businesses need to work together to ensure successful implementation (e.g. available incentives)
- Redeveloping employment lands may not always work; availability to develop employment lands outside urban boundaries
 - Servicing them is an issue (budget)
 - More flexibility with market demands
 - Specifically close to transportation corridors
 - Available for immediate development
 - Short-term planning
- Unique to Niagara; ability to create employment area outside of urban areas; especially lands on edge of urban area; access close to transportation; let the market dictate
- Flexibility on urban area boundary where employment areas can expand



MEETING NOTES

KITCHENER
WOODBIDGE
LONDON
KINGSTON
BARRIE
BURLINGTON

NIAGARA REGION EMPLOYMENT AREA STRATEGY – WORK BOOK COMMENTS

Meeting: Municipal Planners Workshop
Date: Tuesday, October 8, 2019
Time: 2:00 p.m. – 4:00 p.m.
Location: Holiday Inn Express, Niagara-On-The-Lake

WORK BOOK FEEDBACK/DISCUSSION
<p>Feedback on identified criteria for identifying employment areas</p> <ul style="list-style-type: none">• Rural employment areas need to be considered• Conversion of employment area protected• Work force being bussed in from Hamilton (e.g. West Lincoln)• Square footage in agriculture is larger than in urban areas• Re-examine employment area boundaries with consideration for environmental features (SWAP)• Need part of adjustment – how to deal with changing boundaries outside of MCR?• Servicing and environmental limitations need to be considered• Linkages/corridor e.g. GE and downtown link• Environmental – provincially significant wetlands – mapping not ground-truthed to account for actual environmental constraints• Areas that meet all criteria:<ul style="list-style-type: none">○ Fort Erie (Stephensville) – close to border while account for natural areas○ Port Colborne – servicing constraints need to be considered○ Niagara Falls –all areas○ None in St. Catharines○ Two areas in Welland○ Thorold not significant at regional scale – issue around contamination○ Thorold –area around Brock University should be recognized as regionally significant○ West Lincoln – issue of Greenbelt; smaller areas but not going to attract significant employment base• Are areas aligned with federal/provincial objectives? <p>Other Discussion Topics</p> <ul style="list-style-type: none">• How to deal with identification of environmental constraints?• Use criteria to determine level of impacts environmental impacts have; if heavily constrained – consider removing area from employment area in some cases <p>Are there areas that could be converted (e.g. Innovation District)? – may still meet all criteria</p> <ul style="list-style-type: none">• Many areas in St. Catharines

- Idea: identify PSEZ then funnel incentives
- Idea: limited # of areas protected = businesses going there (are they the right areas?)
- Idea: employment areas can regenerate to other employment
- St. Catharines in Eastchester meets 4/5 criteria but not adequately buffered

How should criteria be applied to employment areas?

- Are we protecting transportation features that link employment areas to one another/other major facilities?
- Minor woodlot 2 ha now need EIS (a 1 year process) as deter to employment investment
- Shovel ready land – how to get lands ready?
- Strategy for intensification (Residential uses) can be applied to employment areas – employment lands don't have same level of investment to not keep lands vacant
- Thorold: several employment areas are limited by existing employment uses – little opportunity for employment intensification/redevelopment due to nature of the use and/or contamination

How should areas outside of employment areas be approached? Are they open for conversion?

- Can't let local areas convert but they are easiest to convert
- Conversion criteria – how to differentiate between regional/provincial/local significance?
- How does protection of these areas change? Flexibility? E.g. PSEZ only applied to GGH but not the case – there are other PSEZ outside of GGH
- Idea: stages – start with no employment areas – Region should let on-streaming of employment areas take place
- Idea: working to 2022 – how to deal with conversion until 2022? After 2022, PSEZ function may change to support employment areas (e.g. innovation districts) – e.g. Kitchener has more jobs within innovation district than previous industrial/manufacturing uses on the same site
- Land needs methodology needs to be considered
- Employment areas to innovation district – do we need to go through conversion?
- Idea: West Louth hospital as innovation district
- Use distances/buffers as regulated by the Province (e.g. D6, NPC-300)

Future Employment Areas

- Area in Fort Erie (QEW Corridor) that can be serviced identified as potential future employment area
- These areas should meet criteria and should be identified as Regional employment areas; however, need to recognize that future employment areas may not meet all criteria (e.g. may not be serviced YET but has potential for future servicing)
- Need to recognize growth of employment in knowledge sectors
- Conversion requests – future employment areas need to be protected from conversions

Appendix G

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