

A grayscale photograph of the Edmonton skyline, featuring several high-rise buildings. The image is divided into four vertical panels by thin white lines.

# **VACANT INDUSTRIAL LAND SUPPLY**

## **December 2015**

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The Edmonton logo, consisting of a stylized 'E' followed by the word 'Edmonton' in a sans-serif font, set against a dark blue rectangular background.

**Edmonton**

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## 1. INTRODUCTION

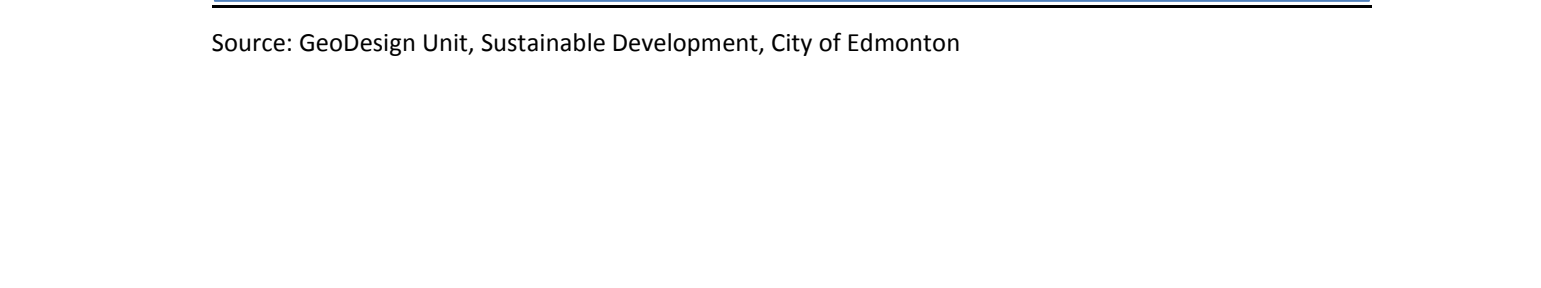
This report updates the City of Edmonton's Industrial Land Supply Study to identify changes that occurred within the designated industrial areas between January 2015 and December 2015. The report provides the basis for making informed land use decisions on the supply and use of industrial lands. The information also assists in the coordination of industrial land use policy and transportation and service investments.

## 2. PURPOSE

The report will cover:

1. Identify vacant industrial land in the City of Edmonton's designated industrial areas and its location
2. Determine how much industrial land was absorbed in the period under review
3. Determine how much industrially-zoned land is present for future development and how much reserve land is present for potential rezoning to alleviate shortages of developable industrial land
4. Calculate the value of building permits issued for various development activities in industrial areas during the study period
5. Use the study results as comparison to previous studies and to provide an indicator of development trends

To fulfill these objectives, a detailed parcel-based industrial lands study was conducted by the City of Edmonton. The study provides a snapshot of the City's industrial land supply and demand. The report is based on a methodology that uses a Geographic Information System (GIS) to track vacant land and various other criteria, such as size of parcels and servicing levels. This year's study represents a continuation of the new process implemented in tracking vacant land since last year. Various terms and processes have been used to set out what land has been included or not to provide for more reliable, consistent, easier to track and improved figures. Refer to Appendix I for the methodology.



### 3. GENERAL FINDINGS

#### 3.1 DEVELOPABLE LAND

The City of Edmonton has four main designated industrial areas. The areas include Edmonton Energy and Technology Park (EETP) that will accommodate eco-industrial and petrochemical development, and the Northeast Industrial Area, Northwest Industrial Area, and South/Southeast Industrial Area which can accommodate diverse industrial activity.

The net zoned vacant industrial and gross reserve lands in Edmonton’s industrial areas (Northeast, Northwest, and South/Southeast) are 795 hectares and 707 hectares respectively. The total vacant industrial land is 1,502 hectares (Table 1 and Chart 1). Northwest Area has the largest amount of vacant land in traditional industrial areas with 821 ha of both net and gross land areas. Energy and Technology Park had an additional 4,810 hectares of mostly gross vacant industrial land. Edmonton’s total supply of industrial land is 6,312 hectares. This is a decrease of around 153 hectares from last year, most of it accounted by absorption (78 hectares) and a smaller portion due to corrections of sites in order to exclude developed portions or future non-industrial lands that were not previously identified in the inventory.

**TABLE 1: ZONED NET AND GROSS VACANT INDUSTRIAL LAND**

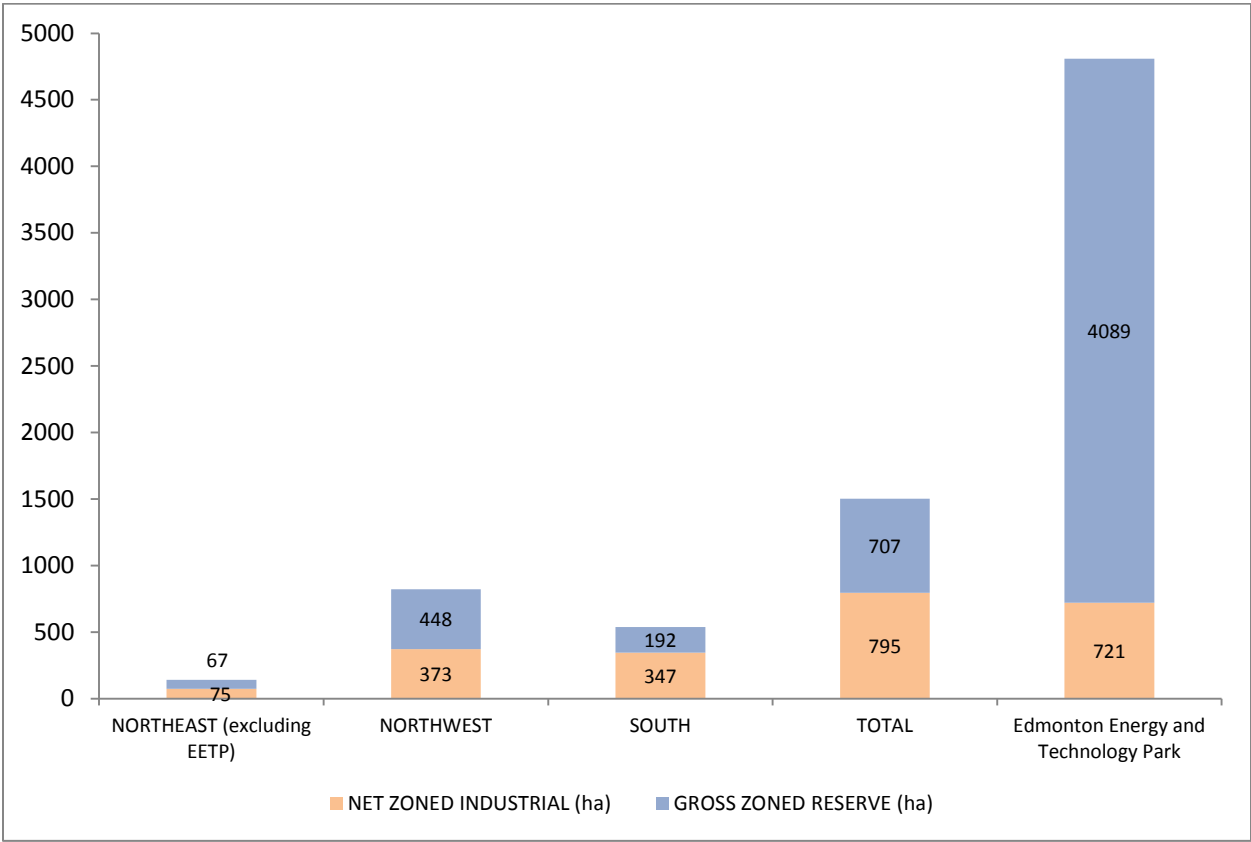
INDUSTRIAL AREA	NET ZONED INDUSTRIAL (ha)	GROSS ZONED RESERVE (ha)	TOTAL (ha)
NORTHEAST (excluding EETP)	75	67	142
NORTHWEST	373	448	821
SOUTH/SOUTHEAST	347	192	539
<b>TOTAL</b>	<b>795</b>	<b>707</b>	<b>1,502</b>
Edmonton Energy and Technology Park*	721	4,089	4,810

\*Please see Appendix II for a detailed explanation of Edmonton Energy and Technology Park.

There was a decrease of around 80 hectares each for both net zoned and gross zoned land figures respectively, from the 2014 figures. Vacant land in Edmonton’s traditional industrial sectors is being depleted and not replenished as these areas come closer to buildout. Some of the future

demand for industrial land, particularly in the Northeast Industrial Area, will be supplied by Edmonton Energy and Technology Park as this area gets serviced.

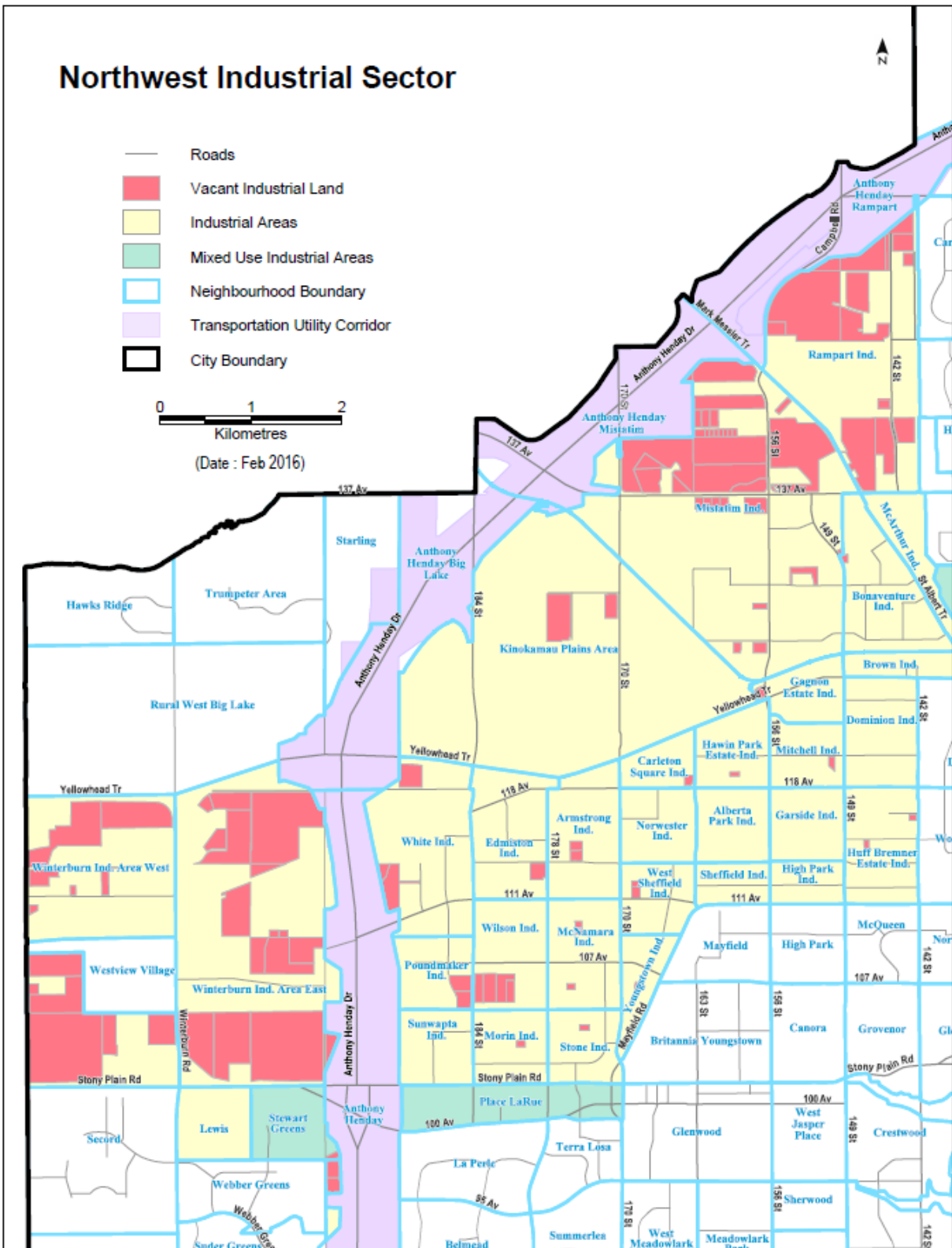
**CHART 1: SUMMARY OF VACANT INDUSTRIAL LAND SUPPLY AS OF 2015**



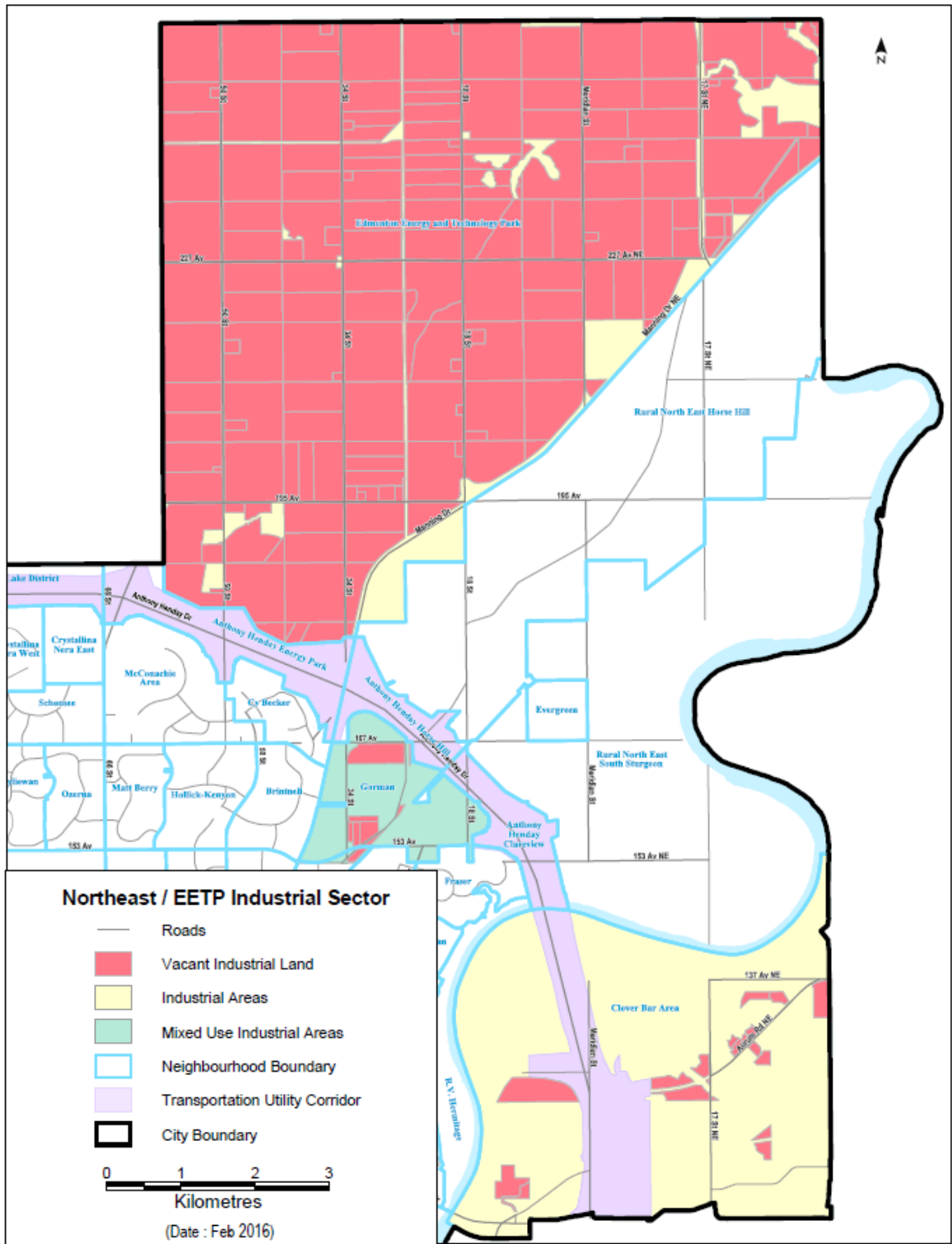
It is important to note that some vacant lands within the industrial areas, even though zoned industrial (IB, IL, IM and IH) and reserve (AG and AGI) are not available for immediate development or may never get developed. This type of land may not be available immediately for industrial development due to servicing and ownership constraints. Maps on the following pages show that there is concentration of vacant industrial land at the edges of the city and internally within neighbourhoods.



### MAP 1: VACANT INDUSTRIAL LAND IN THE NORTHWEST SECTOR

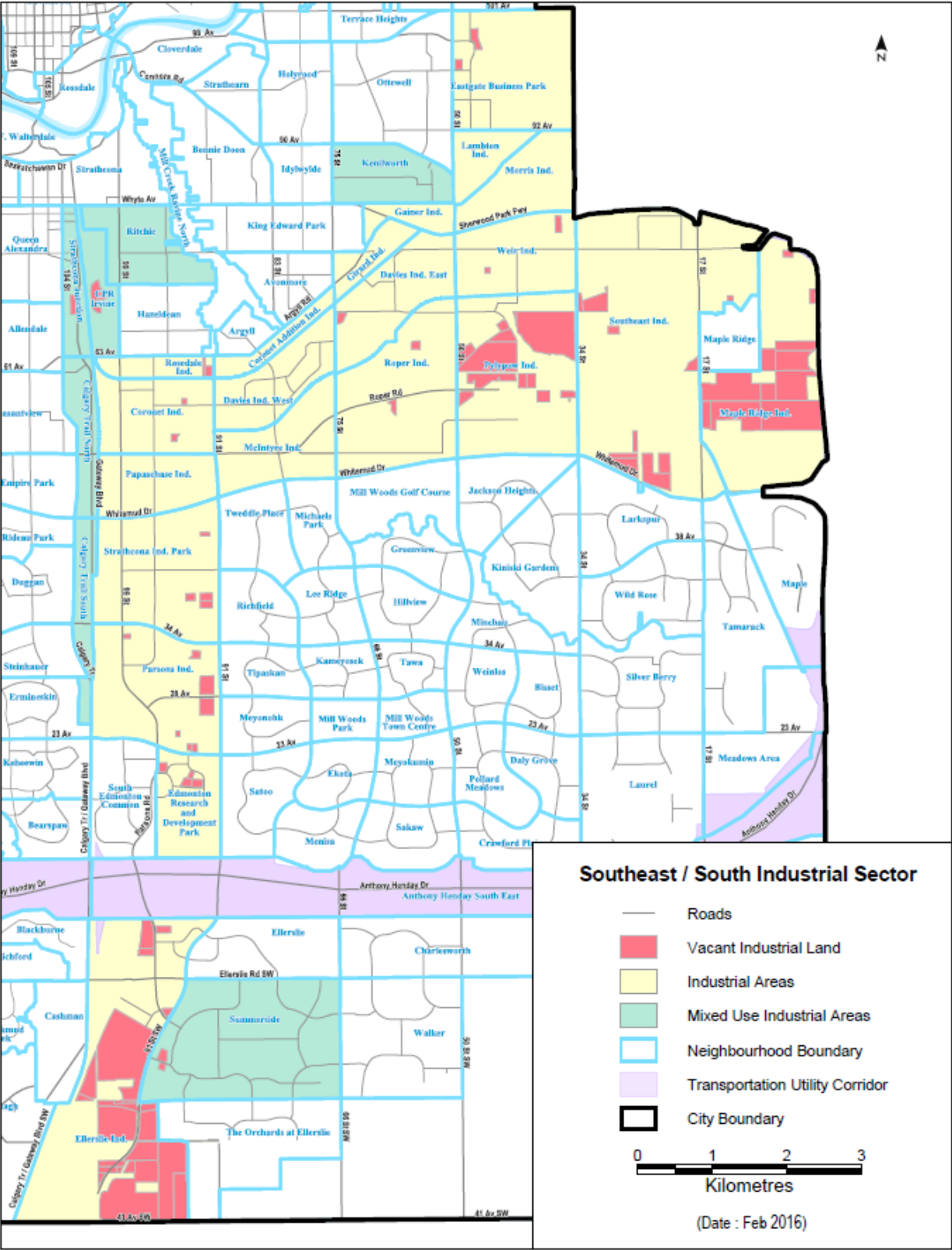


**MAP 2: VACANT INDUSTRIAL LAND IN THE NORTHEAST SECTOR**





MAP 3: VACANT INDUSTRIAL LAND IN THE SOUTH/SOUTHEAST SECTOR





### 3.2 INDUSTRIAL NEIGHBOURHOODS WITH MOST VACANT LAND

Edmonton's industrial areas were examined to ascertain the developing industrial neighbourhoods which currently have most vacant land and are undergoing or anticipating significant growth. More details are available in Table 2.

**TABLE 2: INDUSTRIAL NEIGHBOURHOODS WITH MOST VACANT LAND**

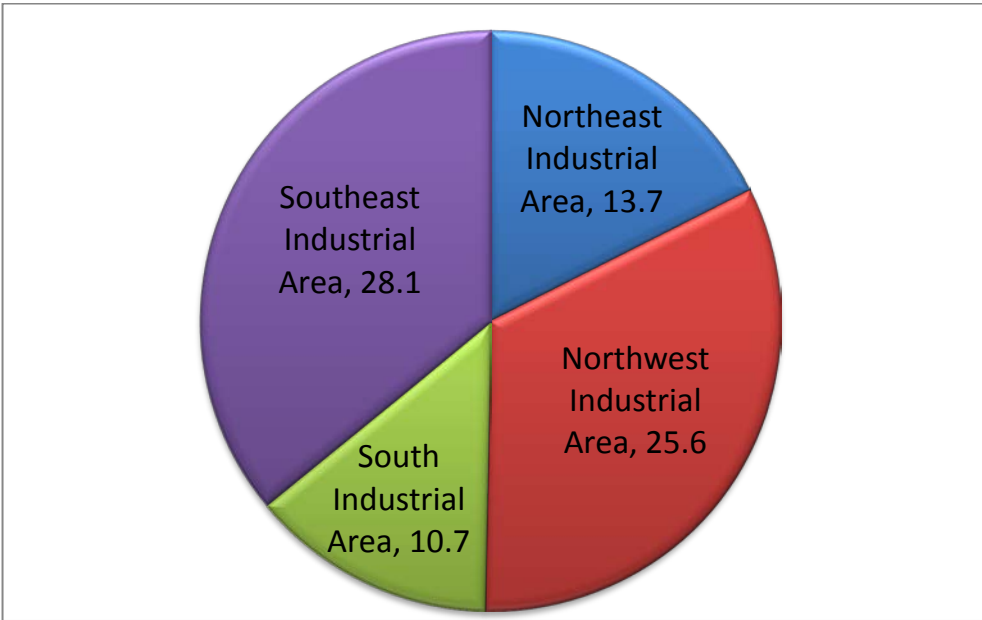
INDUSTRIAL NEIGHBOURHOOD	SECTOR	IB	IM	IL	IH	TOTAL ZONED LAND (ha)	AG	AGI	TOTAL RESERVE LAND (ha)
Clover Bar Industrial	NE	25	43	0	6	74	0	29	29
Ellerslie Industrial	S	77	44	0	0	121	0	102	102
Kinokamau Plains Area	NW	4	14	0	0	17	0	0	0
Maple Ridge Industrial	SE	0	84	51	0	135	0	1	1
Mistatim Industrial	NW	42	21	44	0	107	0	78	78
Pylypow Industrial	SE	4	0	13	0	17	0	79	79
Rampart Industrial	NW	0	16	0	0	16	87	41	128
Southeast Industrial	SE	0	17	11	0	28	0	10	10
Winterburn Industrial Area East	NW	19	32	14	0	64	0	180	180
Winterburn Industrial Area West	NW	10	35	68	0	113	0	54	54
Note: Not all land types indicated above are available for immediate industrial development.									

The table shows that Winterburn Industrial Area East and West, Ellerslie Industrial and Mistatim Industrial Neighbourhoods have the most vacant land. As Aurum Industrial develops out with storage and high-quality building developments mostly for the energy sector, Clover Bar experienced a significant decrease in the amount of vacant land in 2015. Winterburn Industrial also experienced significant rezoning activity and new development, particularly in the central northeastern portion where high-quality warehouse developments are taking shape.

Development took place in most developing industrial neighbourhoods. More significant development, which is over 20 hectares, took place in Clover Bar, Kinokamau Plains, and Winterburn. Though most of the vacant land figures reflect the absorption that took place in that area, slight adjustments were made to take out developed portions of largely vacant parcels in comparison last year.

3.3 INDUSTRIAL LAND ABSORPTION TREND

CHART 2: INDUSTRIAL LAND ABSORPTION IN 2015

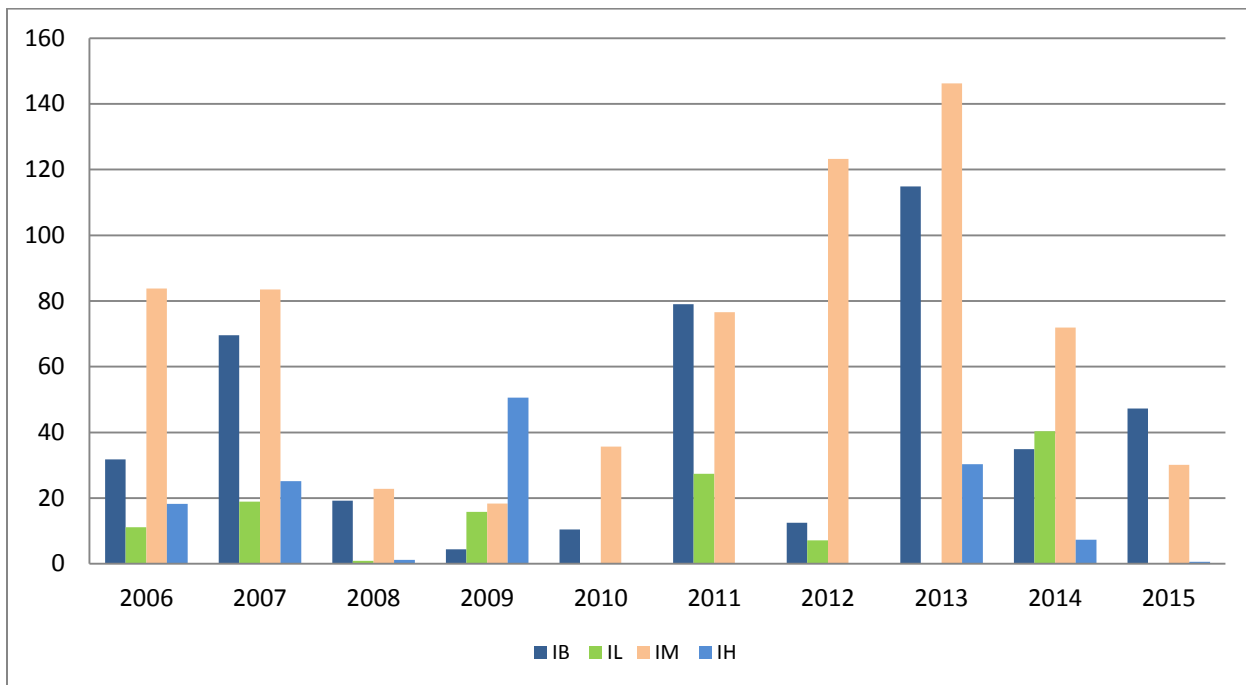


Industrial absorption data comes from development permit information that City of Edmonton collects. The amount of land absorbed by new development (as per development permits issued) in Edmonton’s industrial areas from January to December of 2015 was 78 hectares (Chart 2). The largest land absorption of 28 hectares was in the Southeast Industrial Area. Winterburn Industrial East neighbourhood experienced the biggest absorption at 15 hectares. The least amount of absorption, or around 14 hectares, occurred in the Northeast Industrial Area. Large-scale development is taking place in Winterburn Industrial as this greenfield area gets serviced and developed. There was no absorption in 2014 for Edmonton Energy and Technology Park.

The industrial land absorption from 2006 to 2015 was calculated for each industrial zone to ascertain changes in land absorption over time (see Table 3). Subsequently, the average ten-year absorption rate was calculated using the net annual land absorbed from 2006 to 2015 (shown in Table 3 and Chart 3). The “net” land absorption defined by Western Management Consultants<sup>i</sup> means “land needs exclusive of allocations for roads, utility rights of way, drainage ponds, other environmental reserves, municipal reserves, and any other land allocations not strictly for use by the industrial business.” The calculation revealed an average absorption rate of 137 hectares per

year for the last decade, which is a decrease from 143 hectares from the same measurement in the previous year.

**CHART 3:**  
**TEN YEAR INDUSTRIAL LAND ABSORPTION TREND, 2006 TO 2015 (HECTARES)**



**TABLE 3: CITY OF EDMONTON INDUSTRIAL LAND ABSORPTION, 2005 TO 2014 (HECTARES)**

CITY OF EDMONTON					
CITYWIDE INDUSTRIAL LAND ABSORPTION 2006 TO 2015					
YEAR	IB	IL	IM	IH	TOTAL
2006	32	11	84	18	145
2007	70	19	83	25	197
2008	19	1	23	1	44
2009	4	16	18	51	89
2010	10	0	36	0	46
2011	79	27	77	0	183
2012	13	7	123	0	143
2013	115	0	146	30	291
2014	35	40	72	7	155
2015	47	0	30	1	78
<b>TOTAL (HA)</b>	<b>424</b>	<b>122</b>	<b>692</b>	<b>133</b>	<b>1,371</b>
<b>10 YEAR AVERAGE</b>	<b>42</b>	<b>12</b>	<b>69</b>	<b>13</b>	<b>137</b>

The ten-year average industrial land absorption was 31 hectares for Northeast Industrial Area, 59 hectares for Northwest Industrial Area, and 47 hectares for South/Southeast Industrial Area, respectively (detailed breakdown in Table 4 below).

Similarly, it is vital to ascertain how much prime land Edmonton has left for economic development. To do this, the net vacant zoned industrial lands (IB, IL, IM and IH) mentioned in Table 1 of this report and the annual absorption rates indicated in Table 3 above were matched against each another. When vacant land figures are divided by the absorption rates, it shows that Edmonton could run out of zoned vacant land in around six years. However, new land is rezoned every year from the reserve industrial areas, which by themselves, at current pace can provide an additional 23 years of supply of industrial land (assuming net calculations).

**TABLE 4: INDUSTRIAL AREAS – TEN YEAR AVERAGE LAND ABSORPTION (2006 TO 2015)**

INDUSTRIAL AREA	10 YEAR TOTAL 200 6- 2015	10 YEAR AVERAGE (HA)
Northeast Industrial Area	311	31
Northwest Industrial Area	586	59
South Industrial Area	72	7
Southeast Industrial Area	402	40
<b>TOTAL (HA)</b>	<b>1,372</b>	<b>137</b>

## 4. SERVICING AND PARCEL SIZE AVAILABILITY

For servicing levels, lands were identified in one of four categories:

- Shovel-ready, and already serviced land that is available for development. Usually there is presence of internal roads. This land is ready for a development permit application.
- Fully serviced and/or immediately serviceable lands – Servicing is in place or can be connected when development is proposed. May be subdivided and/or presence of servicing maps are good indicators.
- Partially serviced or potentially serviceable – Requires additional municipal infrastructure or privately-financed extensions. Rezoning and/or servicing maps are good indicators.
- Unserviced or vacant long-term growth areas – Not expected to be fully serviced in the short-term (e.g. five years). Large AGI/AG parcels are good indicators. Land areas are usually gross land figures.

### 4.1 SERVICING LEVEL BY ZONE

Table 5 shows that there is generally a moderate supply of shovel-ready industrial sites in Edmonton. The largest number of shovel-ready industrial sites is found in Industrial Business Zone (IB) and Medium Industrial Zone (IM). As zoned industrial land is generally shovel-ready, there is less of this type of land in the fully-serviced, partially-serviced and unserviced categories. This is because large amounts of investment are involved in industrial development to bring this land up to the last stage of the development process. Further, Agricultural Zone (AG) and Industrial Reserve Zone (AGI) parcels are overwhelmingly unserviced, which is the nature of these sites. They generally require a few years of servicing extensions and subdivision to become readily developable.



**TABLE 5: NUMBER OF SITES BY SERVICING LEVEL**

Servicing Level	INDUSTRIAL NET (Number)				INDUSTRIAL GROSS (Number)		GRAND TOTAL
	IB	IL	IM	IH	AG	AGI	
Shovel ready	43	8	35	3	0	4	93
Fully serviced	10	2	7	2	1	3	25
Partially serviced	11	10	22	2	3	18	66
Unserviced	0	6	5	17	159	24	211
<b>TOTAL</b>	<b>64</b>	<b>26</b>	<b>69</b>	<b>24</b>	<b>163</b>	<b>49</b>	<b>395</b>

\*Includes the Edmonton Energy and Technology Park under standard zones. Some parcels in EETP were split-zoned and so, remained under the AG Zone.

Table 6 shows that the area amounts for different zones and levels of servicing are more evenly distributed for net industrial areas. They are concentrated once again for the gross industrial areas, which is overwhelmingly in the unserviced category. Of note is that Heavy Industrial Zone (IH) parcel areas are undersupplied in the city in the more serviced categories, which is likely a reflection of the risk and nuisances created by activities under this zone. These sites tend to be located further away from residential uses, either on the outskirts of the city or in adjacent municipalities.

**TABLE 6: AREA AMOUNTS (HECTARES) BY SERVICING LEVEL**

Servicing Level	INDUSTRIAL NET (Area)				INDUSTRIAL GROSS (Area)		TOTAL AREA
	IB	IL	IM	IH	AG	AGI	
Shovel ready	64	16	77	7	0	14	177
Fully serviced	32	10	27	4	2	12	86
Partially serviced	148	116	229	6	28	221	748
Unserviced	0	175	161	428	4,163	372	5,300
<b>TOTAL</b>	<b>244</b>	<b>316</b>	<b>494</b>	<b>444</b>	<b>4,193</b>	<b>620</b>	<b>6,312</b>

\*Includes the Edmonton Energy and Technology Park under standard zones.

## 4.2 PARCEL SIZE AVAILABILITY

Reserve lands have larger parcels that will be subdivided in the future. The overwhelming amount of vacant industrial land is found in unsubdivided parcels of over ten hectares in size, which is typically the reserve industrial land that will be developed in the long-term (see Table 7). The rest of the size categories, including 0.5 to 2 hectares, 2 to 5 hectares, and 5 to 10 hectares have a comparable share of land area, ranging from two to four percent. The type of industrial development that is most prominent in Edmonton take place on the 0.5 to 2 hectare and 2 to 5 hectare size categories (see Tables 7 to 9). There are only 359 hectares of land in these categories,



or less than three years of future absorption based on the past decade absorption figures. Though parcels get subdivided eventually from the larger 5 to 10 hectare and above 10 hectare size category, the short three-year time period may present challenges for industrial development that wants to locate in these areas, especially in certain in-demand parts of the city. Subdivision, servicing and infrastructure provision can take two or more years. Edmonton may lose some industrial development opportunities to surrounding municipalities if the tight window of planning and development is not met. However, these size categories may get replenished each year, which may provide some stability. Also, this can be explained once again by the nature of the risk-averse and investment-intensive industrial development industry.

**TABLE 7: AREA AND NUMBER OF ALL VACANT ZONED AND RESERVE INDUSTRIAL LAND PARCELS AND SIZE**

INVENTORY OF ZONED AND RESERVE VACANT INDUSTRIAL LAND PARCELS				
Size	Area of Land (ha)	Share of Land Area	Number of Sites	Share of Total Number*
<b>TOTAL (0.5-2 ha)</b>	<b>121</b>	2%	<b>104</b>	26%
<b>TOTAL (2-5 ha)</b>	<b>238</b>	4%	<b>74</b>	19%
<b>TOTAL (5-10 ha)</b>	<b>205</b>	3%	<b>31</b>	8%
<b>TOTAL (Above 10 ha)</b>	<b>5,743</b>	91%	<b>175</b>	44%
<b>TOTAL (All)</b>	<b>6,312</b>	100%	<b>395</b>	97%

\*Excludes 0-0.5 ha sites, which are 3% and add up to 100%.

Table 8 shows a further breakdown of the number of parcels based on their size and zoning. Once again, there is a shortage of Heavy Industrial sites in each category. For the most part, there is a balanced number of net industrial zoned sites. However, there is a shortage of Light Industrial sites in the 0.5 to 2 hectare size category. Light industrial zoning is preferable to the existing greater concentration of vacant sites in the Industrial Business Zone since Light Industrial sites are limited to specific industrial uses. The Industrial Business Zone has commercial and institutional uses that may erode the viability of industrial areas, due to issues such as risk faced from various nuisances

and hazardous uses, increased traffic impacts and less concentration and quality of jobs in non-industrial uses.

**TABLE 8: NUMBER OF INDUSTRIAL LAND PARCELS BY ZONING AND SIZE**

Size	INDUSTRIAL NET (Number)				INDUSTRIAL GROSS (Number)	
	IB	IL	IM	IH	AG	AGI
0.5 to 2 ha	37	3	29	5	17	13
2 to 5 ha	15	9	13	5	21	11
5 to 10 ha	2	5	5	3	13	3
Above 10 ha	1	8	16	11	112	22
<b>TOTAL</b>	<b>55</b>	<b>26</b>	<b>63</b>	<b>24</b>	<b>163</b>	<b>49</b>

\*Does not include total for land below 0.5 ha, which includes 11 sites in all. Table includes the Edmonton Energy and Technology Park under standard zones.

Table 9 shows a similar context but provides the area in hectares of the different size categories.

**TABLE 9: AREA OF INDUSTRIAL LAND PARCELS BY ZONING AND SIZE**

Size	INDUSTRIAL NET (Area in ha)				INDUSTRIAL GROSS (Area in ha)		Total Area (ha)
	IB	IL	IM	IH	AG	AGI	
0.5 to 2 ha	41	4	32	5	24	15	121
2 to 5 ha	46	29	44	15	63	41	238
5 to 10 ha	16	29	33	19	83	25	205
Above 10 ha	140	254	383	405	4,024	538	5,743
<b>TOTAL</b>	<b>244</b>	<b>316</b>	<b>492</b>	<b>444</b>	<b>4,193</b>	<b>620</b>	<b>6,312</b>

\*Includes the Edmonton Energy and Technology Park under standard zones.

### 4.3 SERVICING AND PARCEL SIZE AVAILABILITY

By combining servicing levels and parcel size information, it becomes further evident in which categories of vacant industrial land shortages exist. As seen in Table 10 below, there is a general concentration of land in the unserviced and partially serviced category, especially for larger parcels. However, it is particularly important for Edmonton is to have shovel-ready and fully-serviced land that is readily developable in the near term and in every size category to accommodate the needs of different businesses. There is a shortage of sites in the 5 to 10 hectare

size category that are shovel-ready and fully-serviced, each being below twenty hectares. Fully serviced sites that are between 0.5 and 2 hectares also comprise an area below twenty hectares. Shovel ready and fully serviced sites in other categories are generally around 20 to 50 hectares. This could result in challenges for industry trying to accommodate unique businesses with specific site requirements unless land is rezoned, subdivided and serviced at a fast pace.

**TABLE 10: AREA OF INDUSTRIAL LAND PARCELS BY ZONING (HECTARES)**

Sum of Total Area		
Servicing	Size Category	Total
Shovel-ready	0.5-2 ha	71
	2-5 ha	49
	5-10 ha	19
	Above 10 ha	34
	Total	177
Fully serviced	0.5-2 ha	8
	2-5 ha	32
	5-10 ha	13
	Above 10 ha	34
	Total	86
Partially serviced	0.5-2 ha	13
	2-5 ha	62
	5-10 ha	65
	Above 10 ha	609
	Total	748
Unserviced	0.5-2 ha	30
	2-5 ha	95
	5-10 ha	107
	Above 10 ha	5,067
	Total	5,300
<b>TOTAL</b>		<b>6,312</b>

## 5. BUILDING PERMITS ISSUED

Building permit values are calculated in a slightly different fashion than the method vacant land is tracked in this report. They are calculated outside of the GIS tracking system using data provided from Posse software. All new significant building activity, whether on a new site or a site with existing development is tracked to help understand all the building activity taking place in the city. Whereas this information was presented on maps in previous reports, it is presented in this report through tables for easier comparison.

Table 11 shows the highest value of \$96,688,395 was issued in the South/Southeast Industrial Area. Other areas followed, including \$88,370,604 for Northwest Industrial Area, and \$48,671,853 for the Northeast Industrial Area. The total is \$233,730,852. The distribution of the 2015 building permit values on an industrial neighbourhood basis is further shown in Table 12.

**TABLE 11: BUILDING PERMIT VALUES BY INDUSTRIAL AREA 2015**

SECTOR	TOTAL (\$)
Northeast	48,671,853
Northwest	88,370,604
South/Southeast	96,688,395
TOTAL	233,730,852

Source: City of Edmonton

Most of the building activity took place in a few key neighbourhoods as seen in Table 12. This includes Clover Bar Industrial at around \$36M, Winterburn at \$32M, Summerside at \$29M, Sunwapta at \$19M, Southeast Industrial at \$17M, Pylypow at \$17M, Ellerslie Industrial at \$13M, and Mistatim at \$9M. Together, these neighbourhoods comprised around 75 percent of building permit activity out of all industrial areas.



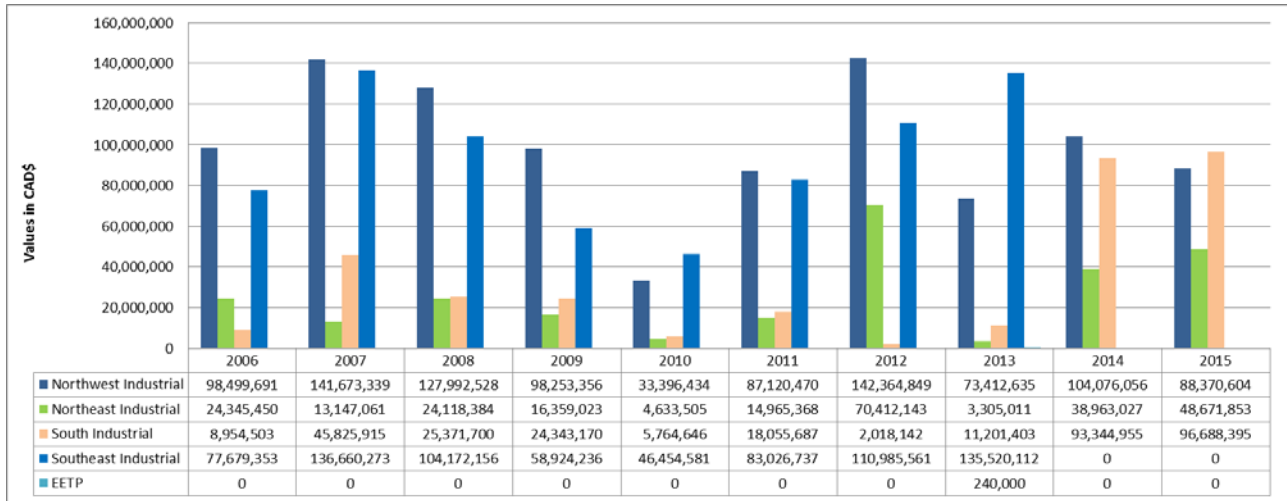
**TABLE 12: BUILDING PERMIT VALUES BY INDUSTRIAL NEIGHBOURHOOD 2015**

SECTOR	NEIGHBOURHOOD	TOTAL (\$)
NORTHEAST	BARANOW	750,000
	CLOVER BAR AREA	36,055,000
	EDMONTON RESEARCH AND DEVELOPMENT PARK	2,700,000
	GORMAN	1,539,000
	INDUSTRIAL HEIGHTS	1,800,000
	KENNEDALE INDUSTRIAL	727,853
	MONTROSE	5,100,000
	<b>TOTAL</b>	<b>48,671,853</b>
NORTHWEST	ARMSTRONG INDUSTRIAL	407,210
	BONAVENTURE INDUSTRIAL	675,000
	CARLETON SQUARE INDUSTRIAL	4,920,000
	HIGH PARK INDUSTRIAL	2,500,000
	KINOKAMAU PLAINS AREA	6,893,000
	MISTATIM INDUSTRIAL	9,371,994
	RAMPART INDUSTRIAL	10,000,000
	SUNWAPTA INDUSTRIAL	18,887,000
	WHITE INDUSTRIAL	980,900
	WINTERBURN INDUSTRIAL AREA EAST	31,516,500
	YOUNGSTOWN INDUSTRIAL	2,219,000
	<b>TOTAL</b>	<b>88,370,604</b>
SOUTH	CORONET INDUSTRIAL	703,000
	EASTGATE BUSINESS PARK	2,000,000
	ELLERSLIE INDUSTRIAL	13,350,000
	MAPLE RIDGE INDUSTRIAL	3,425,356
	MCINTYRE INDUSTRIAL	5,075,000
	PAPASCHASE INDUSTRIAL	7,500,000
	PYLYPOW INDUSTRIAL	16,727,157
	ROPER INDUSTRIAL	700,000
	ROSEDALE INDUSTRIAL	50,000
	SOUTHEAST INDUSTRIAL	17,016,000
	STRATHCONA INDUSTRIAL PARK	621,000
	SUMMERSIDE	29,486,882
	WEIR INDUSTRIAL	34,000
	<b>TOTAL</b>	<b>96,688,395</b>
EDMONTON	<b>TOTAL</b>	<b>233,730,852</b>



Looking at the building permit value trends from 2006 to 2015 in Chart 6 below, except for the South/Southeast Industrial Area (Chart 6), there is a considerable upward swing in the value of permits issued in 2014. Although building permit activity was lower by a third from 2012, it was above the figure from 2013 by around \$10M. Building permit activity decreased by around \$3M from 2014 to 2015. 2015 was just below average year for industrial building activity being around \$15M lower than the previous ten-year period. As previously referenced, South/Southeast Industrial Areas have been combined for 2014 and onwards.

**CHART 6: BUILDING PERMIT VALUES**  
**TEN YEAR BUILDING PERMITS VALUES TREND (2006 TO 2015)**



## 6.0 CONCLUSION

The overall vacant land supply shows stability from year to year. This total overall supply will serve Edmonton's needs in the medium-term. This report shows that the City of Edmonton is currently experiencing a shortage of "developable", "serviced" and "industrially-zoned" vacant land to meet both short- and medium-term land demands. This is even more so compared to the available vacant land from last year. This shortage, in compared to demand, is most acute in the South/Southeast Industrial Area of the city and in the IL zone, particularly for shovel-ready and fully serviced sites in various size categories. City of Edmonton has an opportunity to work with various stakeholders to update the Industrial Land Strategy to find servicing solutions so that Edmonton can accommodate and attract a wide variety of industrial activity. There is a need for serviced and zoned land in all sectors of the city to allow for new development, investment and business retention.

## APPENDIX I

The method used in this report is different from previous report of the industrial land supply in the City of Edmonton. The difference lies in using GIS software to track the vacant land information as opposed to a large spreadsheet. Tracking the information with maps allows for more efficiency, consistency and ease from year to year. The similarity is that the report includes extracting vacant industrial land data from the City of Edmonton's Tax Assessment Control System based on codes found in Table 12. For clarity, additional explanations of zoning and land use classifications applicable in the industrial areas are given:

- Zoned land refers to vacant parcels of land within industrial areas that are zoned for industrial uses: IB, IM, IL, IH, direct control zones, or special industrial zones, EETB, EETC, EETL, EETM, EETR, EIB and EIM. The parcels of land are also classified under land use codes found in Table 1.
- Reserve land refers to vacant parcels of land within industrial areas that have been designated AG or AGI. The parcels of land are also classified under Land Use Codes stated in Table 12 below.
- Reserve land could be available for rezoning to IB, IM, IL, or IH Zones for industrial uses.
- Other Zoned Land refers to vacant parcels of land which are within the industrial areas that have been designated A, AJ, AN, AP, CB1, CB2, CB3, CHY, CNC, CO, CSC, DC1, DC2, NA, PU, RA7, RF1, RF4, RF5, RMH, RPL, RR, RSL, UI or US. The parcels of land are also classified under the Land Use Codes stated in Table 12 below. These parcels of land are not considered, in this analysis, as available for industrial development.
- Extraction of areas that will be non-developable or non-industrial in the future, including those with water bodies, resource development, small size, recent construction, oil/gas pipelines, utility right-of-ways, physical constraints, parking and temporary storage. Further analysis was completed according to zoning, servicing levels and parcel sizes.

The report covers the period from January to December of 2015.



**TABLE 12: TACS CODES FOR VACANT INDUSTRIAL LAND**

	TACS		LAND USE
800	Private Non-Farmland With Single Family Dwelling	1050	Non-farmland with One Unit Dwelling
803	Private Non-Farmland Vacant	9090	Other Vacant Land
810	Private Farmland with Single Family Dwelling	8910	Other Agricultural Land (undefined use)
811	Private Farmland with Multi-Family Dwelling	8910	Other Agricultural Land (undefined use)
812	Private Farmland with Other Buildings	8910	Other Agricultural Land (undefined use)
813	Private Farmland Vacant	8910	Other Agricultural Land (undefined use)
815	Private Farmland Subdivision	8910	Other Agricultural Land (undefined use)
817	Privately owned Farmland Dual Use - Vacant	9090	Other Vacant Land
822	Corporate Non-Farmland with Other Buildings	9090	Other Vacant Land
823	Corporate Non-Farmland - Vacant	9090	Other Vacant Land
830	Corporate Farmland With Single Family Dwelling	8910	Other Agricultural Land (undefined use)
833	Corporate Farmland - Vacant	8910	Other Agricultural Land (undefined use)
835	Corporate Owned Farm	8910	Other Agricultural Land (undefined use)
836	Corporate Owned Farmland Dual Use - Vacant	8910	Other Agricultural Land (undefined use)
837	Corporate Owned Farmland Dual Use - Vacant	8910	Other Agricultural Land (undefined use)
840	Privately Owned Farmland with Single Family Dwelling	8910	Other Agricultural Land (undefined use)
841	Privately Owned Farmland with Multi-Family Dwelling	8910	Other Agricultural Land (undefined use)
842	Privately Owned Farmland with Other Buildings	8910	Other Agricultural Land (undefined use)
843	Privately Owned Farmland - Vacant	8910	Other Agricultural Land (undefined use)
844	Privately Owned Farmland with Non-Residential Component	8910	Other Agricultural Land (undefined use)
845	Privately Owned Farmland with Water/Sewer	8910	Other Agricultural Land (undefined use)
846	Privately Owned Farmland with Dual Use - Vacant	8910	Other Agricultural Land (undefined use)
847	Privately Owned Farmland with Dual Use - Vacant	9090	Other Vacant Land
850	Corporate Owned Farmland with Single Family Dwelling	8910	Other Agricultural Land (undefined use)
853	Corporate Owned Farmland Vacant	8910	Other Agricultural Land (undefined use)
855	Corporate Owned Farmland Water/Sewer	8910	Other Agricultural Land (undefined use)
856	Corporate Owned Farmland Dual Use	8910	Other Agricultural Land (undefined use)
857	Corporate Owned Farmland Dual Use - Vacant	8910	Other Agricultural Land (undefined use)
885	Farmland	8910	Other Agricultural Land (undefined use)
900	Undeveloped Land	9110	Undeveloped Land
909	Undeveloped Land - Other	9090	Other Vacant Land

	Previous vacant industrial land inventories used
	Underutilized land

\*Underutilized land is predominantly found in Edmonton Energy and Technology Park. The current report contains all of the above coded lands, while the previous report was based on only the grey areas.

## APPENDIX II

Edmonton's Energy and Technology Park (EETP) was separated in some tables in this report as this area is in the next phase of Edmonton's industrial land development. In other tables, including those covering servicing and size of parcels, EETP was included under similar standard zones in order to facilitate the demonstration of the information. It is important to note that the newly rezoned Chemical Cluster (EETC) has 428 hectares of land in EETP. There are 115 hectares of zoned Logistics (EETL) and 161 hectares of Manufacturing (EETM) areas. The rest of the area is vacant gross area that comprises 4,089 hectares. Most of the parcels are unserviced and above ten hectares.

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<sup>i</sup> Western Management Consultants, 2000, "Industrial Land Strategy Demand Study Final Report", City of Edmonton, June 30.