

INDUSTRIAL LAND SUPPLY AND ABSORPTION

Edmonton

2024 ANNUAL REPORT

URBAN GROWTH | PLANNING & ENVIRONMENT SERVICES | URBAN PLANNING & ECONOMY

OVERVIEW

Industrial land is essential for achieving regional prosperity (Strategic Goal 3, [ConnectEdmonton](#), p.15). It fosters providing diverse employment and business opportunities. In addition, an adequate supply of industrial land is vital for Edmonton's long-term financial sustainability.

[The City Plan](#) recognizes the role of industrial land in helping Edmonton thrive by setting direction to "maintain land supply necessary to support continued industrial growth", while also using its established industrial lands efficiently to support reinvestment and diversification of business activity (The City Plan, p.68). Furthermore, in 2024, the City updated its [Industrial Investment Action Plan \(IIAP\)](#), a 10-year strategic Action Plan that provides a strategic framework to attract investment, create jobs, stimulate economic growth and diversification, and expand Edmonton's industrial tax base by targeting six key sectors: Advanced Manufacturing, Energy & Clean Technology, Artificial Intelligence & Technology, Food Processing, Transportation & logistics, and Health & Life Sciences. The IIAP outlines nine actions and 28 sub-actions to enhance industrial investment. One of these subactions is to create "...a shovel-ready land supply forecast...by establishing a vacant land inventory data set..." (2024 IIAP, p. 21).¹

This report provides a summary of reserved industrial land and vacant industrial land in Edmonton that can accommodate future industrial growth, including in the six key sectors identified in the IIAP. They are defined as:

- **Reserved industrial lands:** areas identified for future industrial expansion or growth as outlined by an existing Area Structure Plan, but are not yet zoned for industrial use.^{2,3} These lands typically consist of larger, unsubdivided, and unserved parcels of land. As a result, they are not yet available for industrial development until they undergo rezoning, subdivision, and/or servicing.
- **Vacant industrial lands:** areas that are already zoned for industrial uses but do not have any industrial related structures or activity occurring on them. They are considered to be available for future industrial development. The land's readiness for development can vary, as it may be fully serviced, partially serviced, or unserved.

This report can be used to assess whether the city has an adequate supply of land to support anticipated industrial growth and sustain the city's industrial tax base.

Significant updates to the methodology were made in this report to improve alignment with the 2024 IIAP.⁴ Therefore, a long-term trend analysis or comparison to previous reports is not recommended. The numbers reported this year show significant changes compared to previous reports, which may be due to methodology changes rather than changes in land supply.

NON-RESIDENTIAL OPPORTUNITIES NETWORK

Data and analysis included in this report are limited to areas included in the designated Non-Residential Opportunity Network defined in The City Plan, as well as mixed-use neighbourhoods.

¹ Shovel-ready land refers to vacant sites that have all the front-end infrastructure in place (e.g. roadway access, all franchise utility services, etc.) and planning and zoning processes have been completed, and are ready to be developed. This report does not include data on shovel-ready lands.

² Areas currently utilized for rural or country residential purposes are also considered reserved industrial lands with potential for future redevelopment. The data for reserve lands within the Established Non-Residential Area underwent further refinement. This involved removing natural areas and open spaces, such as tree stands and water bodies, as well as existing structures like railways and buildings, from the inventory.

³ Refer to [Zoning Bylaw 20001](#) for the types of industrial developments that are permitted within each of the different industrial zones.

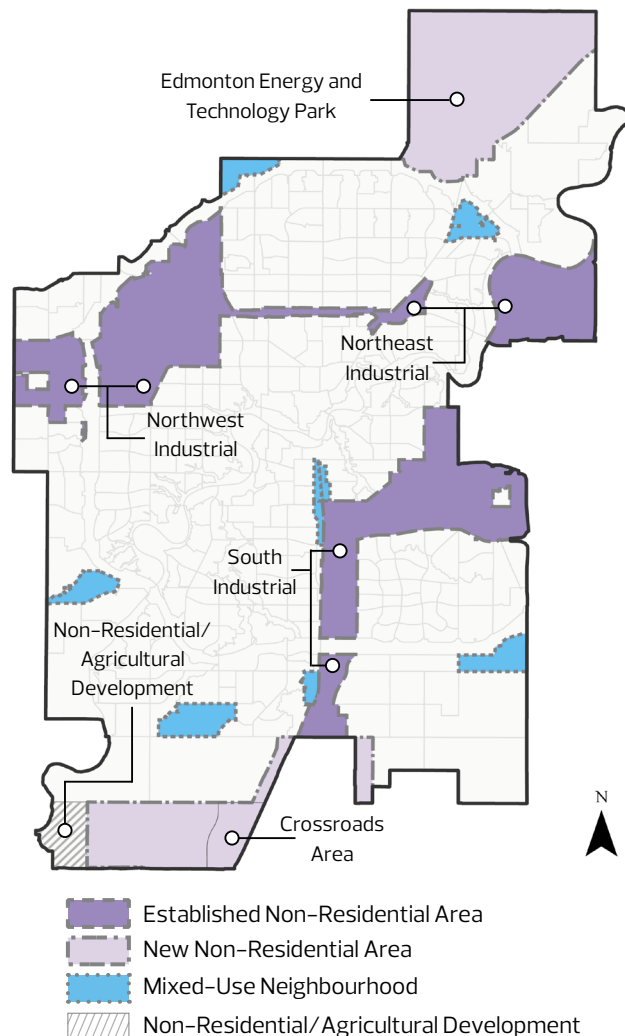
⁴ The following changes to the methodology were made in the current reporting cycle:

- Inclusion of industrial-zoned properties within mixed-use, non-industrial neighbourhoods.
- Inclusion of office spaces and Direct Control Zones for mixed development.
- Differentiation between vacant industrial and reserved industrial lands, previously combined (2020–2023).
- Inclusion of underutilized lands.
- Absorption data incorporates building and development permits for new construction on vacant industrial land.

The Non-Residential Opportunities Network consists of two distinct areas for expanding and enhancing non-residential development in Edmonton: Established Non-Residential Area and New Non-Residential Area (shown in Map 1).

- The Established Non-Residential Area consists of existing industrial neighbourhoods. It is separated into three key industrial areas: Northeast, Northwest and South.
- The New Non-Residential Area includes the designated non-residential lands in the city's Future Growth Area in the south of 41 Avenue Southwest, and the [Edmonton Energy and Technology Park \(EETP\)](#) in the northeast.

Both the Established and New Non-Residential Areas include some lands that are either commercial or not yet part of a planned industrial area (that is, an Area Structure Plan is not yet approved for those lands).



Map 1. Designated Industrial Areas in Edmonton

⁵ Reserve industrial land is measured in gross hectares, while vacant industrial land is measured in net hectares. This is because reserve land is typically unsubdivided, whereas vacant land has been subdivided, separating individual parcels from roads and utilities.

Mixed-use neighbourhoods are identified as residential neighbourhoods that have land designated and/or zoned for industrial use (also shown in Map 1). They are not defined in The City Plan, but are included in the analysis of this report so that all industrial lands in Edmonton could be considered. These neighbourhoods include Alces, Goodridge Corners, Gorman, Cashman, Chappelle and Uplands, offering business employment opportunities (together with CPR Irvine, Strathcona Junction, and Calgary Trail North).

INDUSTRIAL LAND SUPPLY

As of the end of 2024, Edmonton had 6,990 hectares of industrial land available in areas with approved Area Structure Plans. This included 5,112 gross hectares (76 per cent) of reserved industrial land and 1,878 net hectares (24 per cent) of vacant industrial land (Table 1, Map 2, Map 3).⁵ Of the total industrial land available, 6,895 hectares (99 per cent) were within the Non-Residential Opportunities Network.

In addition, the [Rabbit Hill District Plan](#) and [Ellerslie District Plan](#) collectively designate a total gross planned non-residential area of approximately 2,290 hectares alongside 546 hectares of land for agricultural/non-residential use. This is part of the Non-Residential Opportunity Network and represents additional lands designated for future industrial purposes. It indicates substantial potential for industrial expansion within the Future Growth Area. As statutory planning is not yet authorized for majority of the area in the Future Growth Area, these lands have not been included in the analysis.

As shown in Table 1, 84 per cent of reserved industrial lands were located within the New Non-Residential Area. The Established Non-Residential Area had 15 per cent of the reserved industrial lands. The remaining reserved industrial lands (fewer than one per cent) were located within mixed-use neighbourhoods.

The Established Non-Residential Area and New Non-Residential Area have almost equal quantities of vacant industrial land, with 49 per cent and 48 per cent of the total vacant industrial land supply, respectively (Table 1). The remaining four per cent was located within mixed-use neighbourhoods, which consisted mainly of business employment opportunities.

The lower industrial land supply in mixed-use neighbourhoods relative to the Established and New Non-Residential Areas aligns with The City Plan's goal of directing non-residential development to the non-residential areas. Should industrial growth continue in this pattern, it will continue to align with The City Plan.

Refer to Maps 2 and 3 for a visual comparison of the distribution of reserved and vacant industrial land availability by industrial neighbourhood.

Industrial Areas		Reserved (gross ha)	Vacant (net ha)	Total Industrial Land Supply
Established Non-Residential Area	Northeast	73	87	160
	Northwest	429	375	804
	South	300	451	751
	Sub Total	802	911	1,713
New Non-Residential Area	EETP*	4,033	719	4,752
	Crossroads Area**	255	175	430
	Sub Total	4,288	894	5,182
Outside of Industrial Neighbourhoods	Mixed Use Neighbourhoods	22	73	95
	Sub Total	22	73	95
Grand Total		5,112	1,878	6,990

Table 1. Industrial Land Supply by Industrial Area

* Edmonton Energy and Technology Park

** Crossroads Area was annexed in January 2019. The City started tracking the associated vacant industrial land in 2018 using the [Crossroads ASP](#) boundary.

Note: Totals may not add up to exactly 100% due to rounding.

In addition to the reserved and vacant industrial lands, there are approximately 940 ha of underutilized land. The majority (920 ha) are within the Non-Residential Opportunities Network. Underutilized industrial lands are zoned for intensive industrial uses but are only partially developed and/or used for alternative purposes, such as surface parking, outdoor storage or laydown yards without permanent structures. They also include derelict brownfield sites that could be suitable for industrial redevelopment. These lands offer a prime opportunity for rapid industrial intensification; while they are not developed to the full potential of their zone, they likely possess the access and servicing needed for various industrial uses. These lands are not included in the analysis of land availability and absorption in the subsequent sections of this year's report.

INDUSTRIAL LAND AVAILABILITY BY ZONE AND PARCEL SIZE⁶

Comparing industrial parcels by zone and parcel size helps estimate their stage of development within the land development process.⁷ Their development stage can signal

how close they are to being shovel-ready. Additionally, comparing the development stage of industrial parcels within the Non-Residential Opportunities Network helps understand which areas within the network are ready to attract industrial investments.

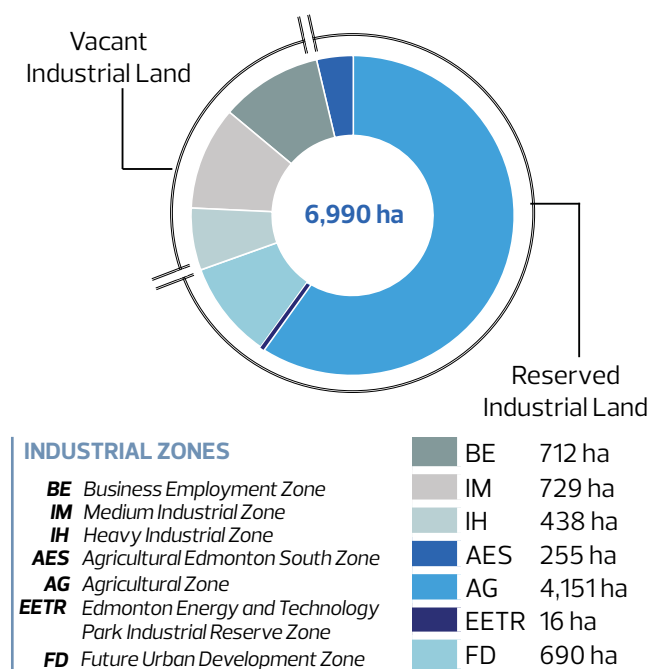


Figure 1. Industrial Land Supply by Zone (2024)

Note: For analytical and reporting purposes, all industrial special zones have been consolidated into three main standard industrial zones: BE, IM, and IH. This consolidation is based on [Zoning Bylaw 20001](#) and includes special zones such as DC, DC1, DC2, EETC, EETIM, EETL, EETM, EIB, EIM, IBES, and ILES.

The Edmonton Zoning Bylaw 20001 has three standard industrial zones: Business Employment Zone (BE), Medium Industrial (IM) Zone, and Heavy Industrial (IH) Zone. As of 2024, 39 per cent of the vacant industrial land is in the IM zone (Figure 1). The BE and IH zones apply to 38 per cent and 23 per cent, respectively.

The majority (81 per cent) of reserved industrial land parcels are zoned for Agriculture (AG). The next largest is the Future Urban Development (FD) Zone at 14 per cent. The FD zone is identified as potential reserved industrial land parcels that currently allow for agricultural and rural land uses, provided they do not hinder future development until the land is needed as specified in a statutory plan. Figure 1 provides a breakdown of the reserved industrial land zones.

⁶ This sub-section focuses on industrial parcels within the Established and New Non-Residential Areas. Industrial areas outside these areas have been excluded as they form a limited portion of Edmonton's industrial land supply.

⁷ The land development process in Edmonton can begin with raw or redeveloping land and ends with finished development. Each parcel needs to be zoned and subdivided to meet the needs of its intended use while still adhering to strategic plans, policies, and guidelines before receiving a development permit and building permit.

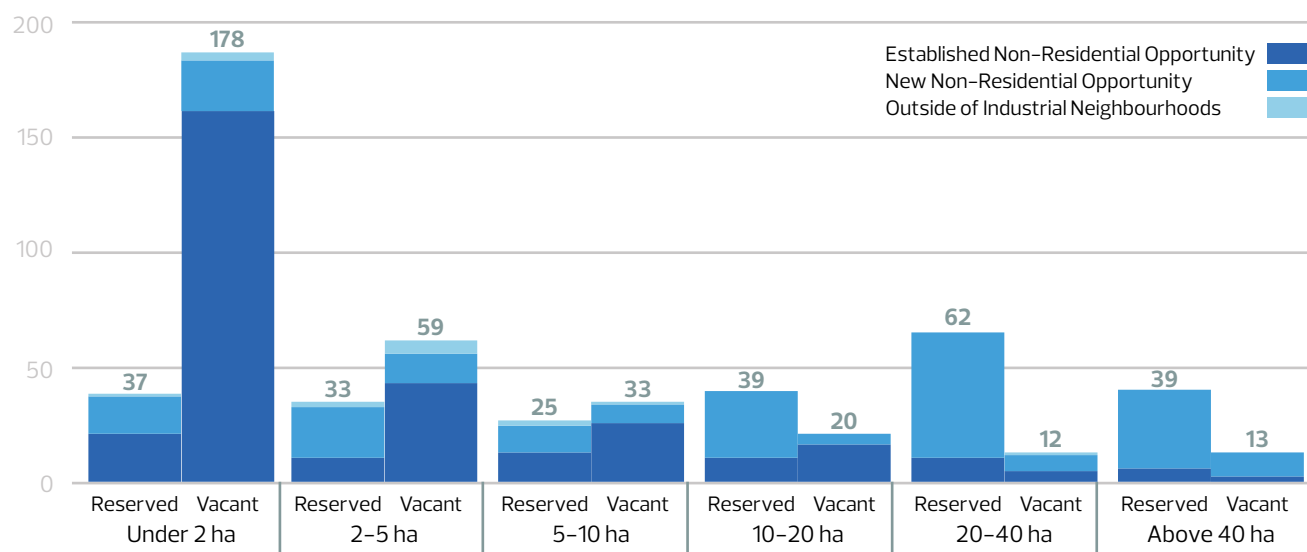


Figure 2. Number of Reserved and Vacant Industrial Land Parcels Available by Parcel Size (2024)

As shown in Figure 2, the majority of vacant industrial land parcels in Edmonton in 2024 were less than five hectares, with 57 per cent under two hectares and an additional 19 per cent between two and five hectares. All of these parcels were situated within the Established Non-Residential Areas (Figure 2). Vacant industrial land parcels that were larger than five hectares were less prevalent, with the number decreasing as the size increases. In contrast, most reserved industrial land parcels were over five hectares, with the most common size being between 20 to 40 hectares (26 per cent of parcels), while both the 10 to 20 hectare and over 40 hectare size categories each accounted for 17 per cent. These parcels were primarily found in the New Non-Residential Areas.

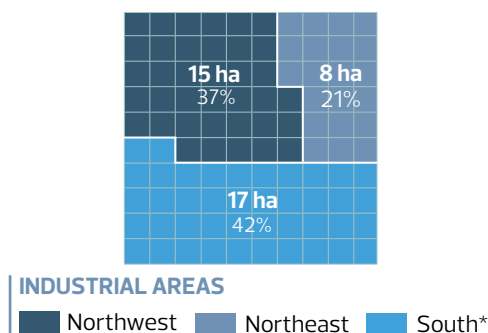
This suggests that businesses requiring small or medium sized parcels, such as warehousing or research laboratories, have locational flexibility. However, it might be more convenient and efficient for them to locate within the Established Non-Residential Areas, where subdivision and zoning are already in place. Large-scale industrial development, such as food processing or petrochemical sites, that require larger sized parcels are somewhat restricted to the New Non-Residential Areas, where larger lots are available. For these larger operations, the potential for lot consolidation within the Established Non-Residential Areas persists.

However, since reserved industrial land is not zoned for industrial uses yet, the land supply for large-scale industrial developments may be further away from being shovel-ready than the land supply for small and medium scale industrial developments.

INDUSTRIAL LAND ABSORPTION

Industrial land absorption refers to the conversion of vacant industrial land to land utilized for industrial purposes. A parcel is considered absorbed when a development permit or building permit is issued for an industrial facility on a vacant industrial parcel. This section focuses on Established and New Non-Residential Areas, as mixed-use neighbourhoods did not experience any industrial land absorption in 2024.

In 2024, industrial development in three major industrial areas resulted in a net absorption of 39 hectares. The majority (36 hectares, 92 per cent) was in the Established Non-Residential Area, with an additional three hectares (eight per cent) in the New Non-Residential Area. This growth was distributed unevenly across the city, with the South and Northwest significantly attracting more new industrial development than the Northeast. These two areas collectively accounted for 79 per cent of the total land absorbed (Figure 3).



* For the purpose of this graph, the 3 hectares of industrial land absorbed in the New Non-Residential Area is included in the South industrial area.

Figure 3. Industrial Land Absorption by Industrial Area (2024)

In 2024, the five industrial neighbourhoods with the highest industrial land absorption collectively absorbed 33 net hectares of industrial land. This constituted 85 per cent of the total industrial land absorbed in 2024 (Figure 4).

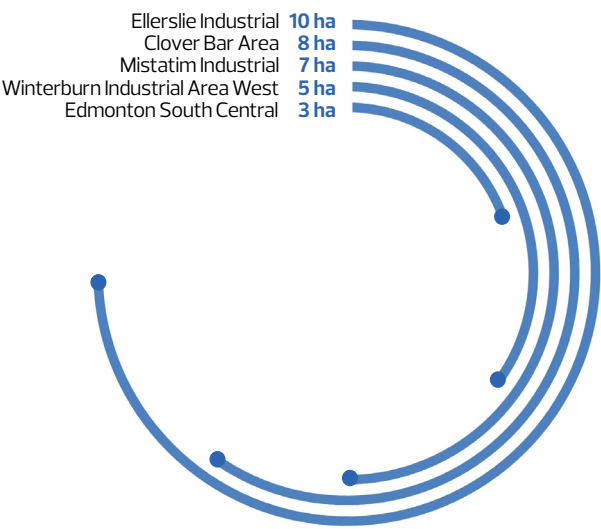
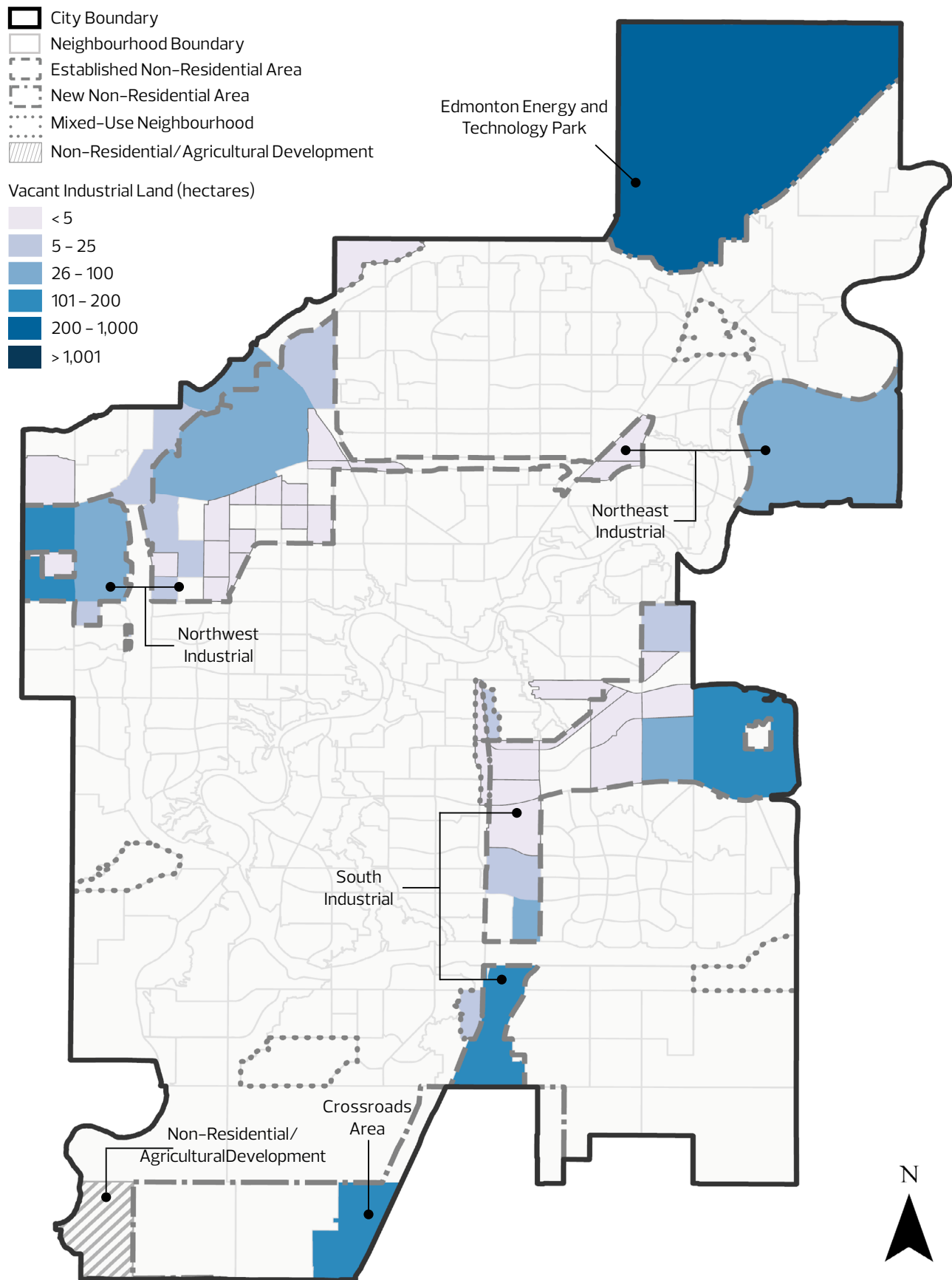


Figure 4. Top Five Industrial Neighbourhoods By Absorption (2024)



Map 2. Vacant Industrial Land Supply (2024)

