City of Maple Ridge

COUNCIL WORKSHOP AGENDA
December 14, 2021
11:00 a.m.
Virtual Online Meeting including Council Chambers

The purpose of the Council Workshop is to review and discuss policies and other items of interest to Council. Although resolutions may be passed at this meeting, the intent is to make a consensus decision to send an item to Council for debate and vote or refer the item back to staff for more information or clarification. The meeting is live streamed and recorded by the City of Maple Ridge.

REMINDER: Council Meeting – December 14, 2021 at 7:00 p.m.

1. APPROVAL OF THE AGENDA

2. ADOPTION OF MINUTES

2.1 Minutes of the November 23, 2021 Council Workshop Meeting and November 29 to 30, 2021 Special Council Workshop Meeting

3. PRESENTATIONS AT THE REQUEST OF COUNCIL – Nil

4. UNFINISHED AND NEW BUSINESS

4.1 Consultant Report - Thornhill Employment Lands Opportunity Assessment

Staff report dated December 14, 2021 recommending that the Urban Systems Thornhill Employment Lands Opportunity Assessment report be received for information and that staff undertake analysis of the report findings and bring recommendations on next steps to a future Council Workshop meeting.

4.2 Processes for Permitting Curb-side Patios on a Long-term Basis

Staff report dated December 14, 2021 recommending the development and implementation of a permitting process to allow restaurants, cafes and craft breweries to operate curb-side (on-street) patios on a long-term basis.

5. CORRESPONDENCE – Nil

6. BRIEFING ON OTHER ITEMS OF INTEREST / QUESTIONS FROM COUNCIL

7. MATTERS DEEMED EXPEDIENT

8. NOTICE OF CLOSED COUNCIL MEETING

The meeting will be closed to the public pursuant to Sections 90 (1) and 90 (2) of the *Community Charter* as the subject matter being considered relates to the following:

Section 90(1)(a)	Personal information about an identifiable individual who is being considered for a position appointed by the municipality;
Section 90(1)(e)	the acquisition, disposition or expropriation of land or improvements, if the council considers that disclosure could reasonably be expected to harm the interests of the municipality;
Section 90(1)(g)	litigation or potential litigation affecting the municipality;
Section 90(1)(i)	the receipt of advice that is subject to solicitor-client privilege, including communications necessary for that purpose;
Section 90(1)(k)	negotiations and related discussions respecting the proposed provision of a municipal service that are at their preliminary stages and that, in the view of the council, could reasonably be expected to harm the interests of the municipality if they were held in public.

Any other matter that may be brought before the Council that meets the requirements for a meeting closed to the public pursuant to Sections 90 (1) and 90 (2) of the Community Charter or Freedom of Information and Protection of Privacy Act.

9. ADJOURNMENT

APPROVED BY:

DATE: Dec 10/21

PREPARED BY

DATE: Dec. 10, 2021

CHECKED BY: C. Schmidt

DATE: Dec. 10/2021

City of Maple Ridge

COUNCIL WORKSHOP MINUTES

November 23, 2021

The Minutes of the City Council Meeting held on November 23, 2021 at 11:04 a.m. held virtually and hosted in the Council Chambers of the City Hall, 11995 Haney Place, Maple Ridge, British Columbia for the purpose of transacting regular City business.

PRESENT	*Appointed Staff*
Elected Officials	S. Hartman, Chief Administrative Officer
Mayor M. Morden	C. Carter, General Manager Planning & Development Services
Councillor J. Dueck	C. Crabtree, General Manager Corporate Services
Councillor C. Meadus	D. Pollock, General Manager Engineering Services
Councillor G. Robson	P. Hlavac-Winsor, General Counsel and Executive Director,
Councillor R. Svendsen	Legislative Services
Councillor A. Yousef	S. Nichols, Corporate Officer
	T. Thompson, Director of Finance
ABSENT	
Councillor K. Duncan	*Other Staff as Required*
	C. Goddard, Director of Planning
	D. Pope, Director of Recreation & Community Engagement
	V. Richmond, Director of Parks & Facilities
	F. Smith, Director of Engineering

These Minutes are posted on the City Web Site at www.mapleridge.ca

Note: Due to COVID Councillor Robson participated virtually. The Mayor chaired the meeting from Council Chambers.

1. *APPROVAL OF THE AGENDA*

R/2021-WS-098
It was moved and seconded

That the agenda of the November 23, 2021 Council Workshop Meeting be approved as circulated.

CARRIED

2. *ADOPTION OF MINUTES*

2.1 **Minutes of the October 26, November 2, November 9 and November 16, 2021 Council Workshop Meeting**

R/2021-WS-099
It was moved and seconded

That the minutes of the Council Workshop Meeting of October 26, November 2, November 9 and November 16, 2021 be adopted as circulated.

CARRIED

3. *PRESENTATIONS AT THE REQUEST OF COUNCIL* – Nil

4. *UNFINISHED AND NEW BUSINESS*

4.1 Parks, Recreation & Culture (PRC) Master Plan Process

Staff report dated November 23, 2021 providing a recommended approach to ensure the community's short and long-term visions for the delivery of parks, recreation and culture services, programs and delivery models are identified and addressed in the Maple Ridge PRC Master Plan.

The Director of Recreation & Community Engagement provided a detailed presentation on the master plan process advising that the next steps include issuing an RFP for consultant services in Q4 2021 in hopes for adoption of the plan in Q4 2022.

Staff responded to questions from Council.

5. *CORRESPONDENCE* – Nil

6. *BRIEFING ON OTHER ITEMS OF INTEREST/QUESTIONS FROM COUNCIL* – Nil

7. *MATTERS DEEMED EXPEDIENT* – Nil

8. *ADJOURNMENT* – 11:28 a.m.

M. Morden, Mayor

Certified Correct

S. Nichols, Corporate Officer

City of Maple Ridge

SPECIAL COUNCIL WORKSHOP MINUTES

November 29 to November 30, 2021

The Minutes of the City Council Meeting held on November 29, 2021 at 9:00 a.m. held virtually and hosted in the Council Chambers of the City Hall, 11995 Haney Place, Maple Ridge, British Columbia for the purpose of transacting regular City business.

PRESENT	*Appointed Staff*
Elected Officials	S. Hartman, Chief Administrative Officer
Mayor M. Morden	C. Carter, General Manager Planning & Development Services
Councillor J. Dueck	C. Crabtree, General Manager Corporate Services
Councillor C. Meadus	D. Pollock, General Manager Engineering Services
Councillor G. Robson	P. Hlavac-Winsor, General Counsel and Executive Director,
Councillor R. Svendsen	Legislative Services
Councillor A. Yousef	S. Nichols, Corporate Officer
	T. Thompson, Director of Finance
ABSENT	
Councillor K. Duncan	*Other Staff as Required*
	C. Cowles, Manager of Community Social Safety Initiatives
	M. van Dop, Fire Chief
	W. Dupley, Director of Economic Development
	C. Goddard, Director of Planning
	M. Lewis, Executive Director of Human Resources
	C. Nolan, Deputy Director of Finance
	W. Oleschak, Acting Director of Operations
	D. Olivieri, Manager of Corporate Planning and Consultation
	F. Smith, Director Engineering

These Minutes are posted on the City Web Site at www.mapleridge.ca

Note: Due to the COVID-19 pandemic, Councillor Robson chose to participate electronically. The Mayor chaired the meeting from Chambers.

1.0 *CALL TO ORDER*

2.0 *APPROVAL OF THE AGENDA*

R/2021-WS-100
It was moved and seconded

That the agenda of the November 29 and 30, 2021 Special Council Workshop Meeting be approved as circulated.

CARRIED

3.0 *2022 - 2026 BUSINESS PLAN*

Staff report dated November 29, 2021 providing information on the 2022-2026 Corporate Plan and the business planning process for the City of Maple Ridge.

3.1 INTRODUCTION AND WELCOME

The Chief Administrative Officer spoke to the process of business planning and the agenda for the next two days.

3.2 CORPORATE PLAN

The General Manager, Corporate Services, provided a presentation on the Corporate Plan for 2022.

3.3 DEPARTMENT HIGHLIGHTS

The order of the agenda was amended by having the Fire Chief present first.

Fire Department

The Fire Chief provided a detailed presentation on the Fire department business plan.

Economic Development

The Director of Economic Development provided a detailed presentation on the Economic Development department business plan. Staff responded to questions from Council.

Human Resources

The Executive Director of Human Resources provided a detailed presentation on the Human Resources department business plan and spoke to the Human Resources Strategic Plan. Staff responded to questions from Council.

R/2021-WS-101
It was moved and seconded
That the meeting be recessed.

CARRIED

Note: The meeting reconvened at 10:13 a.m. Mayor Morden was absent when the meeting reconvened with Councillor Meadus in Chair.

Note: Councillor Yousef left the meeting at 10:20 a.m.

Legal and Legislative Services (including Civic Property)

The General Counsel and Executive Director, Legal and Legislative Services provided a detailed presentation on the Legal and Legislative Services department business plan. Staff responded to questions from Council.

Note: The Mayor entered the meeting at 10:21 a.m. and assumed Chair.

Community Social Safety Initiative

The Manager of Community Social Safety Initiatives spoke to the success of the Community Resource Hub and provided a detailed presentation on the Community Social Safety Initiative business plan. Staff responded to questions from Council.

Note: Councillor Yousef re-entered the meeting at 10:30 a.m.

Corporate Communications

The Manager, Corporate Communications provided a detailed presentation on the Corporate Communications department business plan. Staff responded to questions from Council.

Corporate Planning & Consultation

The Manager of Corporate Planning and Consultation provided a detailed presentation on the Corporate Planning and Consultation department business plan.

Finance

The Director of Finance spoke to changes to the compliance side of accounting and asset retirement obligations and provided a detailed presentation on the Finance Department business plan. Staff responded to questions from Council.

Information Technology

The Chief Information Officer provided a detailed presentation on the Information Technology department business plan.

Police Services

The Superintendent Mehat / Officer in Charge, Ridge-Meadows RCMP and Inspector Lucash provided a detailed presentation on the RCMP and Police Services Department business plan. The Members responded to questions from Council.

Engineering (including Recycling)

The Director of Engineering provided a detailed presentation on the Engineering Department business plan. Staff responded to questions from Council.

Engineering Operations

The Acting Director of Engineering Operations spoke briefly to the City's response to the recent storms. Mr. Oleschak presented on the Engineering Operations business plan. Staff responded to questions from Council.

R/2021-WS-102
It was moved and seconded
That the meeting be recessed for one hour.

CARRIED

Note: The meeting reconvened at 1:01 p.m. Councillor Robson was absent when the meeting reconvened.

Parks & Facilities

The Director of Parks & Facilities provided a detailed presentation on the Parks and Facilities business plan.

Note: Councillor Robson entered the meeting electronically at 1:07 p.m. during the staff presentation.

Recreation & Community Engagement

The Director of Recreation & Community Engagement provided a detailed presentation on the Recreation and Community Engagement department business plan.

Building

The Chief Building Official provided a detailed presentation on the Building department business plan. Staff responded to questions from Council.

Licences & Bylaws

The Director of Bylaw & Licensing provided a detailed presentation on the Licences and Bylaws department business plan.

Planning

The Director of Planning provided a detailed presentation on the Planning department business plan. Staff responded to questions from Council.

R/2021-WS-103
It was moved and seconded
That the meeting be recessed to allow staff time to queue up the Capital Program presentation.

CARRIED

Note: The meeting reconvened at 2:04 p.m. Councillor Robson was absent when the meeting reconvened.

3.4 Capital Program

The Director of Finance provided a detailed presentation on the City's Capital Plan. Funding sources were identified and explained. Capital works reserve use explained. Infrastructure sustainability fund on way to funding but long path, allocation presented.

Capital Funded by Others – Significant Reliance heavily reliant on grant funding for 240 street bridge north of 124 Ave and Abernethy way extension 232-240. Capital Plan – Summary; capital by category – technology, parks, highways (roads), drainage and sewer, water

Note: Councillor Robson reentered at 2:08 p.m.

R/2021-WS-104
It was moved and seconded
That the meeting be recessed until 9:00 a.m. November 30, 2021.

CARRIED

1.0 Reconvene

The Mayor reconvened the meeting at 9:06 a.m. on Tuesday, November 30, 2021. Due to technical difficulties Councillor Robson entered the meeting electronically at 9:08 a.m.

The Chief Administrative Officer summarize the previous day's events and spoke to the agenda for the reminder of the 2022 – 2026 Business Planning.

2.0 **2022 – 2026 BUSINESS PLANNING – Financial Overview Report**

Staff report dated November 29, 2021 recommending that items included in the Financial Overview Report (see Page 38) be approved for inclusion in the 2022-2026 Financial Plan Bylaw.

The Deputy Director of Finance provided a detailed presentation on the Financial Overview Report. The Director of Finance provided a detailed presentation on items that are outside of the proposed 3.6% tax increase and the RCMP Contract Changes.

2.1 **Wrap up and Council Discussion**

Members of Council asked questions and provided comments to staff.

Staff advised that the Financial Plan Bylaw would be coming forward for consideration at the December 7, 2021 Special Council meeting.

Note: The Mayor left the meeting at 10:03 a.m. Councillor Meadus assumed the Chair. The Mayor reentered the meeting at 10:05 a.m. and reassumed the Chair.

R/2021-WS-104
It was moved and seconded

That the financial plan be referred back to staff to allow the comments from Council to be incorporated into a draft financial plan bylaw.

CARRIED

3.0 *ADJOURNMENT* -

_____
M. Morden, Mayor

Certified Correct

_____
S. Nichols, Corporate Officer

MAPLE RIDGE
British Columbia
mapleridge.ca

City of Maple Ridge

TO:	His Worship Mayor Michael Morden and Members of Council	**MEETING DATE:**	December 14, 2021
		FILE NO:	
FROM:	Chief Administrative Officer	**ATTN:**	Workshop

SUBJECT: **Thornhill Employment Lands Opportunity Assessment**

EXECUTIVE SUMMARY:

At the March 30, 2021 Council Workshop the following resolution was passed:

> *That staff prepare a Thornhill Employment Lands Scoping Report, which outlines the necessary background studies, estimated costs, and a timeline that indicates when an Area Plan process may commence, taking into account feedback received from Council at the March 30, 2021 Council Workshop Meeting.*

Since that time staff have commissioned an initial key study to assess the market viability of an industrial land use that will inform future development of the Thornhill area. The study has been completed by Urban Systems (Attachment A) and discusses:

- Industrial Market Trends
- Industrial Demand Assessment
- Existing and Future Competitive Employment Areas
- Supply and Demand Synopsis and Implications
- Optimal Development Areas Assessment
- Conclusions on Thornhill Employment Lands Opportunity

While the Urban Systems study looked at the current regional trends and the Maple Ridge context, the opportunities discussed for expansion of the City's employment lands supply involve complexities and challenges that include financial implications to be assessed and considered. The key message coming out of the Urban Systems study is that while an employment use may be viable in Thornhill, it needs to be studied further and carefully considered in the greater context of long-term planning for employment lands in Maple Ridge.

RECOMMENDATION:

That the Urban Systems Thornhill Employment Lands Opportunity Assessment report be received for information.

And that staff undertake analysis of the report findings and bring recommendations on next steps to a future Council Workshop meeting.

CONCLUSION:

In the second quarter of 2021, Council directed staff to look into studies and steps to be taken in exploring an employment future in Thornhill. An initial study has been completed on market viability of an employment opportunity in Thornhill and looks at how this location compares with other similar contexts in Maple Ridge.

The report findings discuss how pursuit of a future employment use in Thornhill, at this time, will have implications for other employment lands in Maple Ridge, both existing and currently in planning, and careful consideration for next steps is recommended. However, the key message in the Urban Systems report is that employment is a viable use in Thornhill and the City would benefit from retaining the area for a long-term employment future.

Prepared by: **Lisa Zosiak, MRM, MCIP, RPP**
Manager of Community Planning

Reviewed by: **Charles R. Goddard, BA, MA**
Director of Planning

Approved by: **Christine Carter, M.PL, MCIP, RPP**
GM: Public Works & Development Services

Concurrence: **Scott Hartman**
Chief Administrative Officer

The following appendices are attached hereto:

Appendix A: Thornhill Employment Lands Opportunity Assessment

THORNHILL EMPLOYMENT LANDS OPPORTUNITY ASSESSMENT

CITY OF MAPLE RIDGE

December 6, 2021

550 - 1090 Homer Street, Vancouver, BC V6B 2W9 | T: 604.235.1701

CONTACT: Justin Barer, RPP, MCIP
E: jbarer@urbansystems.ca

URBAN SYSTEMS

PREPARED FOR:

Lisa Zosiak, Manager of Community Planning
11995 Haney Place
Maple Ridge, British Columbia

550 - 1090 Homer Street, Vancouver, BC V6B 2W9 | T: 604.235.1701

File: 1279.0037.01

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EXECUTIVE SUMMARY

I. Background

The Thornhill Urban Reserve has long been held by Maple Ridge for future housing developments. The primary triggers for urban development in Thornhill are the City's population reaching 100,000 and the residential capacity within existing neighbourhoods reaching buildout. While the 100,000 resident threshold is expected to be reached in the next six to ten years, there remains ample capacity to accommodate residential growth within existing urban areas for at least the next 50 years.

The City of Maple Ridge, and the Metro Vancouver region, has a vested interest in encouraging denser (re)development within existing urban areas, particularly in walking / rolling distance to transit services. Achieving greater concentrations of residents and employment uses near transit will likely accelerate the timelines for achieving a higher level of transit services within the City.

At the same time, there is a critical and growing industrial land shortage in the Metro Vancouver region. Given the combination of ample capacity in Maple Ridge for (and vested interest in) growing residential development in existing urban areas, plus the local and regional need to find more lands to accommodate a variety of employment uses that require different types of industrial land, the City of Maple Ridge commissioned this assessment of the market opportunity for industrial land uses in Thornhill. The creation of new market-aligned employment land capacity is a priority for Maple Ridge and Metro Vancouver, as reflected in the OCP.

II. Market Trends and Implications

There are significant industrial land constraints throughout the Metro Vancouver market, including Maple Ridge. The extent of this constrained market can be seen in a variety of key metrics and indicators:

- *Industrial Land Prices:*
    - North of the Fraser River, from Port Moody to Maple Ridge, industrial land prices have increased by 28.2% from 2018 to 2021. Price growth has been more substantial south of the Fraser River, South of Fraser markets growing by 112% and Fraser Valley market (e.g., Abbotsford, Chilliwack) growing by 145% over the same period.
    - Industrial land prices in Maple Ridge have more than doubled since 2018, from under $660,000 per acre to over $1.3 million per acre
- *Industrial* Space Sales:
    - The price to buy built industrial space has also risen dramatically. North of the Fraser River (Port Moody to Maple Ridge), prices of built space increased nearly 22% between 2018 and 2021. South of Fraser and Fraser Valley markets grew by 46% and 54% in the same period.
    - Sale prices for industrial space in Maple Ridge reached $274 per square foot on average in 2021, up 17.6% from 2018.
- *Vacancy Rates*
    - The industrial space vacancy rate in Maple Ridge – Pitt Meadows sits at 0.1% as of the third quarter of 2021. Vacancy has hovered at or under 1% for the last 3 years.

- *Lease Rates*
    - Industrial lease rates in Maple Ridge – Pitt Meadows increased by nearly 41% from 2018 to 2021. This compared to 12% in Port Coquitlam, 60% in Delta, 61% in Surrey, and 34% in Abbotsford

The trends in Maple Ridge are broadly reflective of the story in the region in general: rapid price growth (sale and lease), low vacancy, and new supply insufficient to meet latent and growing demand. The theme of latent demand growth has also been noted in multiple discussions with industrial / commercial brokers.

III. Industrial Land Demand and Positioning

The extent of future demand for industrial land in Maple Ridge has been assessed through a combination of employment-growth-driven forecasting and interviews with industrial brokers and developers.

The forecast model begins with an understanding of trends and growth prospects, by industry sector, across Metro Vancouver, under low, medium, and high scenarios. This is followed by multiple projections of employment across industry sectors (2-digit NAICS) in Maple Ridge (based on varying shares of regional growth), allocation of projected growth by employment sector into land use categories (office, industrial, commercial, other), and conversion of employment growth to industrial land needs through sector-specific employment densities. The latter were based on calculations prepared for the *Maple Ridge Commercial and Industrial Strategy* (2014).

The future employment growth scenarios for Maple Ridge are summarized as follows:

- **Reference Scenario –** adopts Metro Vancouver's medium growth scenario for the region, and its corresponding medium growth scenario for Maple Ridge.
- **Scenario 2 – Higher Regional Growth + Constant Maple Ridge Share**: The region sees overall growth that is 15% higher than in the reference scenario. Maple Ridge maintains a stable share of that growth, equal to the share in the reference scenario.
- **Scenario 3 – Lower Regional Growth + Constant Maple Ridge Share**: the region sees growth at a slower than historic rate, and Maple Ridge maintains a stable share of that growth.
- **Scenario 4 – Higher Regional Growth + Higher Maple Ridge Share**: The region sees stronger overall growth as described in Scenario 2, and the north-of- Fraser markets play an increasing role in that growth.
- **Scenario 5 – Lower Regional Growth + Lower Maple Ridge Share**: the region sees growth at a slower than historic rate, and that growth is increasingly being concentrated in the central markets through land intensification, resulting in a declining share of growth in Maple Ridge.

The resulting employment projections and associated industrial land needs are summarized in the following two figures:

Figure i: Forecast Comparison – Incremental Employment Growth on Industrial Lands, Maple Ridge, 2021-2051

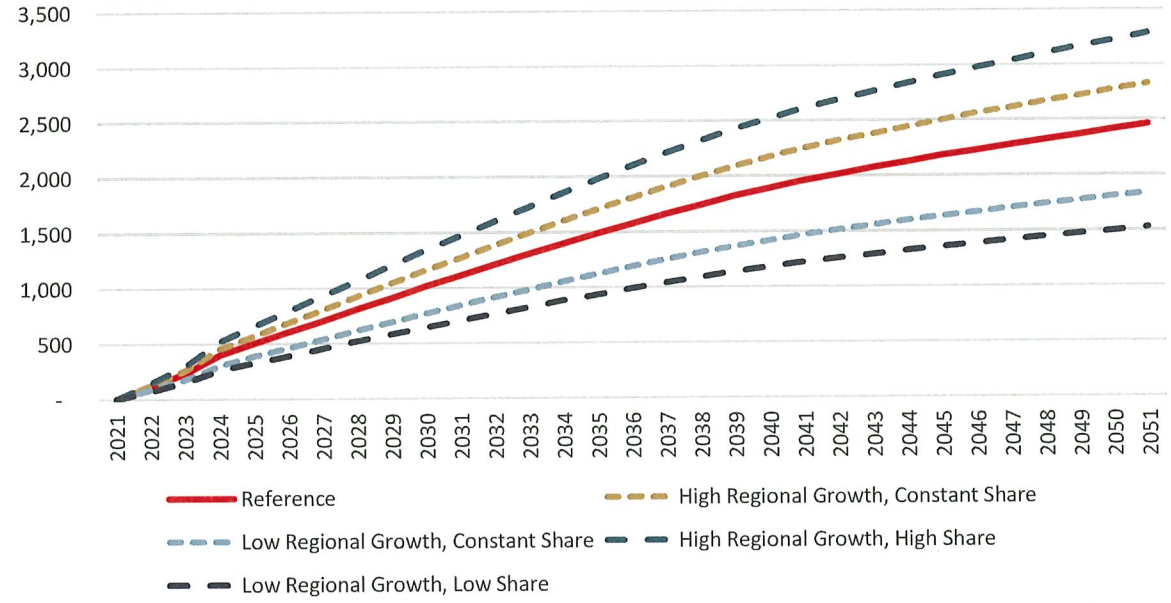
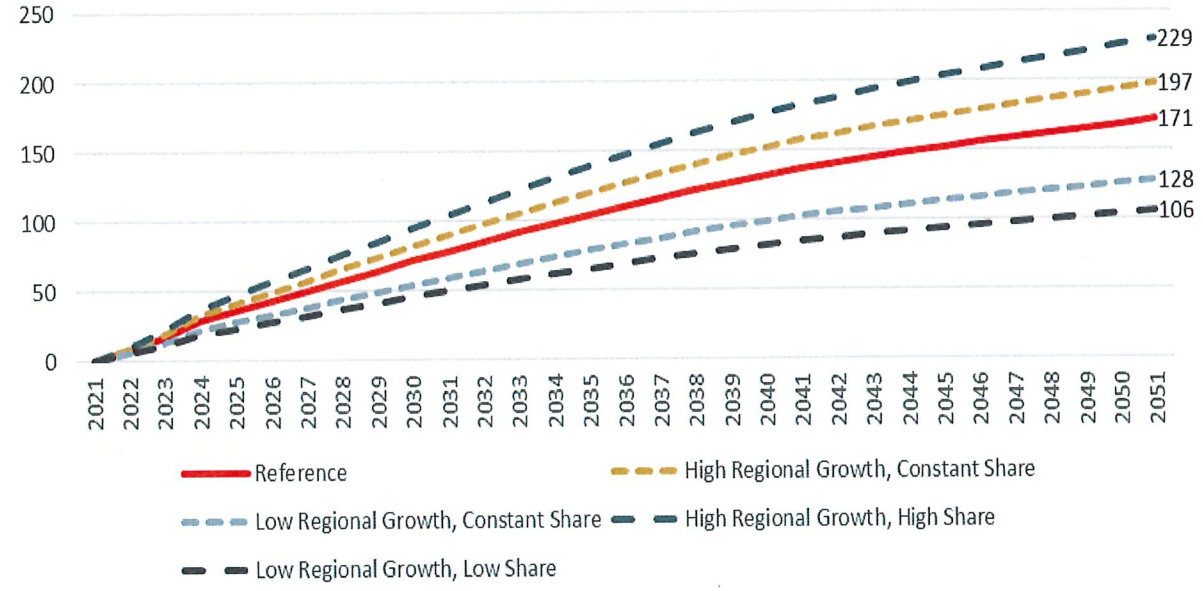


Figure ii: Forecast Comparison – Cumulative Industrial Land Demand (ac), Maple Ridge, 2021-2051



Of the 106 to 229 acres of incremental industrial land need from 2021 to 2051 (excluding whatever latent demand exists in the market today), it is estimated that the 30-year demand amongst the sub-sectors which would be viable at Thornhill ranges from 41 to 139 acres. Again, this excludes latent demand. Those sub-sectors are noted in the "User Groups" section below.

Interviews with industry professionals indicated the following as it relates to market demand and positioning for an industrial project in Thornhill:

- User Groups
    - Local users that require slightly lower price points, the ability to access outdoor space for storage, do not need quick access to Highway 1, and do not need very large flat sites. Thornhill will not attract major warehouses, logistics or distribution facilities.
    - Target sectors are likely to include:
        - manufacturing (wood, metals, machinery, food etc.)
        - construction (and related services)
        - primary resource sectors
        - business / commercial services
        - professional / technical services.
- Location and Form
    - Offer a range of lot sizes (0.5 acres to 10+ acres), with potential for even larger assemblies
    - Provision of yard space is essential
    - New access to the Lougheed is a critical success factor for any industrial use in Thornhill
- Scale and Absorption
    - An industrial park of up to 100 acres (+/-) could be successful, provided that up-front costs to bring the infrastructure, perform required earthworks, and develop the lots, can be carried until sufficient revenues can be achieved
    - The higher the up-front costs, the larger the scale of project that will be needed to justify the costs
    - An average of 5 acres could likely be sold to businesses / end-users per year
    - Absorption will ultimately depend on overall market strength, pricing, and competitive product in the immediate and surrounding markets
- Other Considerations
    - Access solutions, including joint work with Kwantlen First Nation, will be required
    - Environmental, geotechnical, and other assessments will be needed to fully assess the potential for an industrial land use
    - Servicing solutions will also require work with the Kwantlen First Nation
    - Many lots will need to be assembled to bring an industrial park to market
    - Substantial grading will be required to carve out the requisite flat lots that industrial users will require
    - Thornhill must be considered in the context of the future of the Industrial Reserve lands at the north end of 256th Street. Both the Reserve and Thornhill will require new roads to make the respective areas viable for industrial development (Abernethy Way to 256th, and Lougheed connector, respectively). The areas would appeal to broadly overlapping

sectors. Some have suggested the Industrial Reserve would be a better location for industrial development.

IV. Competitive Supply

There are a variety of potential industrial projects on the horizon in Maple Ridge, with varying degrees of likelihood and timing. None are expected to come to market before 2025 at earliest. The following are important to consider in the context of understanding the market opportunity at Thornhill:

- **Hammond Business Park**
  - A future 41-acre business park south of Maple Meadows Business park, with potential to accommodate up to 900,000 square feet of built floor-space.
  - Will be attractive to user typologies seeking space at Golden Ears Business Park in Pitt Meadows.
  - There is not likely to be significant overlap between users seeking space at this site and those who would be attracted to Thornhill.
- **Hammond Mill Redevelopment**
  - A 27-acre redevelopment of a waterfront site in the Hammond neighbourhood, offering a flat, industrially zoned parcel with proximity to major highways and water access.
  - Future form and character will likely be similar to Hammond Business Park in terms of lot coverage and general configuration.
  - There is not likely to be significant overlap between users seeking space at this site and those who would be attracted to Thornhill.
- **Yennadon Lands**
  - A cluster of 13 properties totalling 63 acres in north-central Maple Ridge at 129th Avenue and 232nd Street.
  - Industrial concept endorsed by council in 2020, with First Reading of the amending bylaws in May 2021.
  - If the preferred concept is accepted and the relevant OCP amending bylaws and other amendment requirements are passed, this project could be a compelling offering for many users.
  - While there could be more overlap between users that would seek space here and those that may look to a place like Thornhill, the extent of overlap will be driven by relative prices for land and built space and built space typologies.
- **Industrial Reserve Lands**
  - This is by far the most directly competitive potential industrial area for Thornhill.
  - The Industrial Reserve is located west and northwest of Kanaka Business Park, on either side of 256th Street. It comprises 223 gross acres.
  - OCP policy encourages future "general mixed employment uses" in this area, including light industrial, institutional, and heavy industrial
  - For these lands to be opened for industrial development, the City must extend Abernethy Way east to 256th Street.
  - The Industrial Reserve, accessed via Abernethy Way, would attract many of the same user groups that would otherwise look to Thornhill.
  - Given the possible scale of these lands, it is questionable whether both this area and Thornhill could move forward simultaneously.
  - Further assessment of the Industrial Reserve would be needed to identify developable areas and costs to bring the areas to market.

- **Kwantlen IR 5**
  - Kwantlen is in process of exploring early land use concepts for its IR 5 reserve, which currently includes an envisioned industrial land use north of the Lougheed Highway on the west side of the Reserve. This land would be accessed by a new from the Lougheed Highway, which could then take one of three possible routes through the Reserve to a connection with 100th Avenue in Thornhill.
  - This area could be a compelling offering for many users given visibility from and access to the Lougheed.
  - The area could be competitive to Thornhill (slowing absorption in the latter), however the combination of IR 5 and Thornhill could also appeal to slightly different users and proceed simultaneously.
- **Albion Flats**
  - If given approval from the ALC, this area could see the emergence of a 35+ acre light industrial park.
  - Some significant conditions must be met before the ALC will consider an exclusion.

V. Supply / Demand Implications

The industrial land supply in Maple Ridge is constrained. There are few undeveloped parcels available in existing parks (e.g., Kanaka), and rapid price escalation is indicative of these low supply and growing latent demand conditions. There are multiple sources of possible future industrial land supply (as discussed above), however none are likely to come to market before 2025 at earliest. Further, some of these projects may not proceed past the conceptual stage.

Employment projections suggest a range of future industrial land needs. At the high end, demand over 30 years is projected at 229 acres, while the reference scenario projects demand of 171 acres. Within that overall demand picture, the sectors most likely to seek spaces in Thornhill (or a location with comparable attributes) account for up to 142 acres of growth in the high scenario (62% of total), and 100 acres in the reference scenario (58% of total).

Beyond these growth-related requirements, there is a growing pool of latent demand for space from businesses in Maple Ridge that want to expand, and businesses that would relocate to Maple Ridge if appropriate lands were available.

If Thornhill were opened for industrial development with easy access to Lougheed Highway, a multi-phase project of up to 100 acres could be market supportable with an absorption period of 20-40 years. Such a project would need to offer a wide range of lot sizes, from 0.5 acres to 10+ acres, with opportunity to assemble lots for larger uses. Target users within the sectors described above would be those requiring slightly lower price points, the ability to access more outdoor space for storage, and do not require immediate Highway 1 access

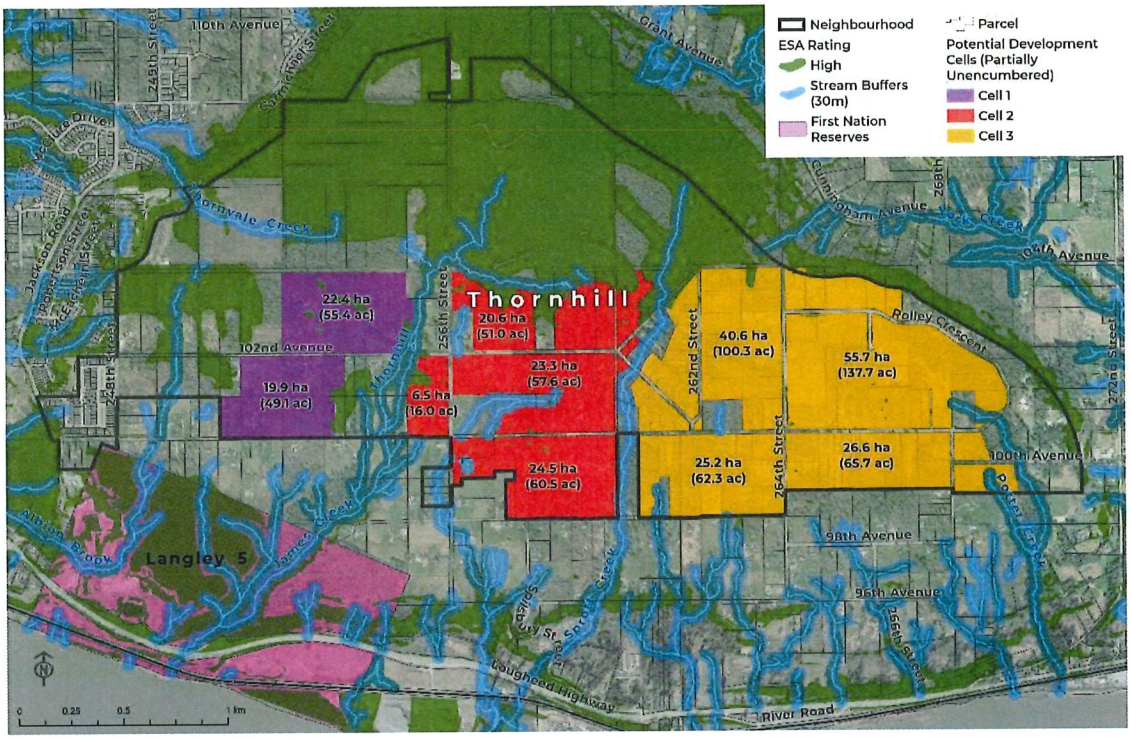
Target markets at Thornhill would substantially overlap with markets for a newly opened Industrial Reserve accessed via Abernethy Way. This is a key consideration to keep in mind as decisions are taken regarding prioritization of infrastructure investments. Both Thornhill and the Industrial Reserve will require substantial infrastructure investments to bring to market, the costs of which are yet unknown.

VI. Optimal Development Areas

If industrial development were to proceed in Thornhill, the preferred location would need to consider factors such as topography, water course setbacks, environmentally sensitive areas, future servicing and

access, and parcel distribution / ownership. Based on our preliminary GIS analysis, the following possible "Development Cells" in Thornhill have been identified (Figure iii below).

Figure iii: Potential Development Cells for Employment Lands



The identified Development Cell #1 would likely present the most viable option given both the likely future routing for a new road into Thornhill and the likelihood of servicing extension from the west or south. The amount of land in this area is sufficient to satisfy a multi-phase project with a 20–40-year absorption period, and the area is not substantively more topographically constrained than other areas. Pro forma financial analysis will be needed following additional due diligence to determine whether the project could be economically viable based on the required servicing costs.

Development Cells #2 and #3 may be viable for long-term future industrial uses, but the timelines for those uses to emerge are beyond the projection horizon for this project. Further, the need for those areas will vary depending on the future of the Industrial Reserve, plus some of the other potential future industrial supply noted above.

VII. Conclusions and Recommendations

There is a market opportunity for an industrial / employment lands node to emerge in Thornhill. That opportunity is for a 100 acre (+/-) industrial area with a 20–40-year absorption period. The park would immediately fulfill a clear latent 'gap' in the market, and thereafter would serve the projected needs of a sub-set of industry sectors, which other areas of potential supply could not serve.

The opportunity at Thornhill cannot be considered in isolation. In particular, while there is a clear market opportunity today and in the future for this area, the City must consider whether opening Thornhill for industrial use is preferable to opening the Industrial Reserve lands for development through extension of Abernethy Way. Both Thornhill and the Industrial Reserve will require substantial infrastructure investments by the City to be made viable (the costs of which are unknown), with the former requiring

new access from the Lougheed, and the latter requiring the Abernethy Way extension. Both areas would serve a notable, growing, and substantially overlapping industrial market gap.

If the Industrial Reserve lands are opened, this does not necessarily mean that there is no industrial future in Thornhill. Rather, the timing for such use would be pushed well into the future. As such, the City may consider applying an "Industrial Reserve" designation in Thornhill (at least for Development Cell #1, and possibly all or portions of other Development Cells). The timing for opening those areas to industrial development would be driven by both the pace of absorption in the Industrial Reserve, and the possible timing (and costs) of creating a new access point to the Lougheed.

Further background study to assess other aspects of Thornhill's viability as an industrial area will be needed to fully assess the opportunity. These studies would provide inputs for pro forma financial viability assessments. At that point, the costs to bring Thornhill online can be weighed against the costs to bring the Industrial Reserve to market, allowing council to make an informed decision on infrastructure dollar allocations.

There are a few potential scenarios and paths forward:

1. If Abernethy Way extension moves forward and the Industrial Reserve is opened, this pushes the opportunity at Thornhill well into the future.
2. If Abernethy Way is deemed unviable, then there is a clear near-term market opportunity at Thornhill to serve latent and future demand amongst sectors that do not have viable alternatives.
3. If the Kwantlen First Nation is able to proceed with an industrial project on IR 5 (which will require servicing agreements with the City) and this occurs before an Abernethy Way extension is completed, then an opportunity emerges for Thornhill, which could be part of a new employment cluster.
4. If Kwantlen proceeds with an industrial project and the Industrial Reserve lands are opened via an Abernethy Way extension, then the relative financial viability and timing for bringing lots to market in Thornhill vs. the Industrial Reserve will become a primary differentiating factor. This scenario would warrant further exploration to gauge target end-user sentiments at that time.

1.0 INTRODUCTION AND BACKGROUND

The Thornhill Urban Reserve has long been held by Maple Ridge for future housing developments. The primary triggers for urban development in Thornhill are the City's population reaching 100,000 and the residential capacity within existing capacity reaching buildout. While the 100,000 resident threshold is expected to be reached in the next six to ten years, there remains ample capacity to accommodate residential growth within existing urban areas for at least the next 50 years.

The City of Maple Ridge, and the Metro Vancouver region, has a vested interest in encouraging denser (re)development within existing urban areas, particularly in walking / rolling distance to transit services. Achieving greater concentrations of residents and employment uses near transit will likely accelerate the timelines for achieving a higher level of transit services within the City.

At the same time, there is a critical and growing industrial land shortage in the Metro Vancouver region. This is result of geographic constraints, competing development pressures, complex jurisdictional issues, siting and adjacency issues, and location of industrial lands in area of growing flood risk.

Given the combination of ample capacity for (and interest in) growing residential development in existing urban areas, plus the local and regional need to find more lands to accommodate light industrial / business park-type uses and forms, the City of Maple Ridge is actively exploring a possible future of industrial / employment uses in Thornhill. The creation of new market-aligned employment land capacity is a priority for Maple Ridge and Metro Vancouver. This is reflected in the City's OCP employment lands policies and reiterated in the Regional Industrial Lands Strategy. The latter was endorsed by Council in December 2020.

This report represents an initial foray into exploration of an employment lands future in Thornhill, looking at the area through a market lens. The purpose of this study is to assess whether there is market viability for an industrial land use in Thornhill, given likely demand and supply conditions, and the particularities of the Thornhill area in terms of location, configuration, access, topography, and other considerations. It also explores what a future industrial use in Thornhill could look like, considering overall size, parcel sizes, and target sectors.

The report is structured as follows:

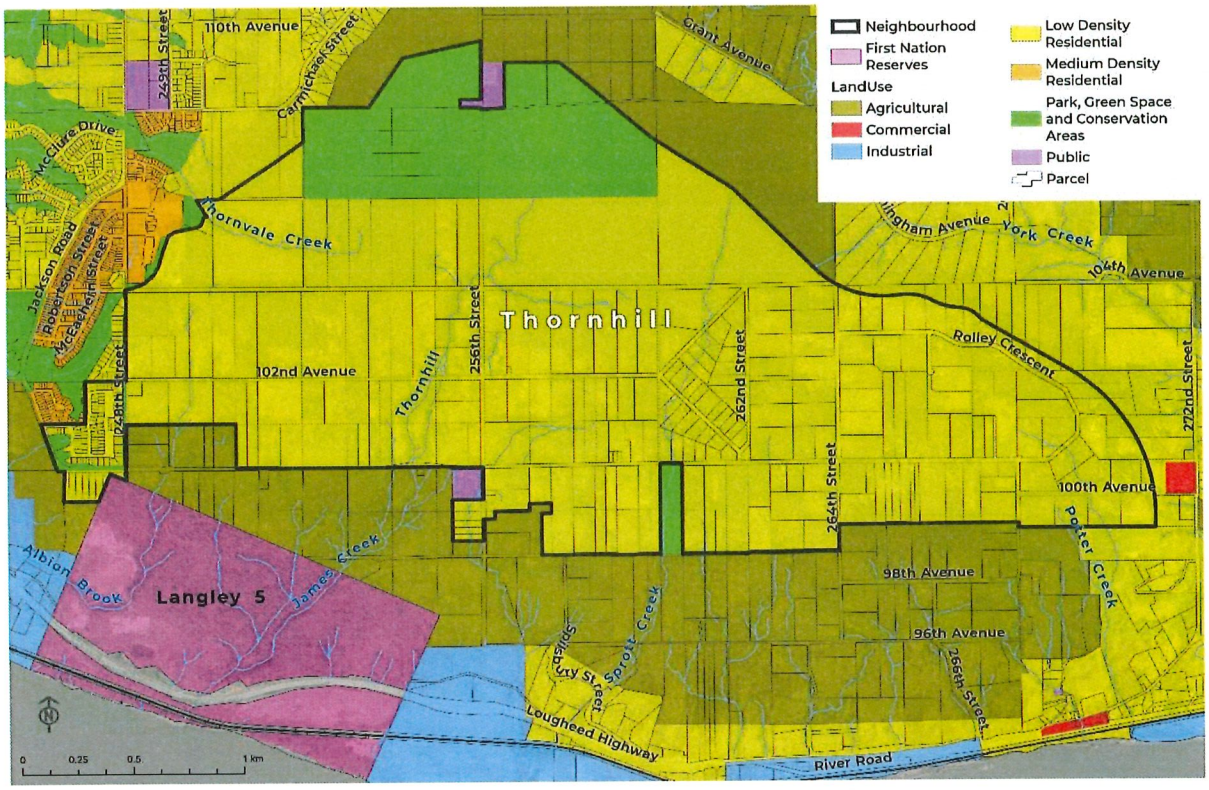
- **Section 2.0** Overview of Thornhill Urban Reserve
- **Section 3.0** Industrial Market Trends
- **Section 4.0** Industrial Demand Assessment
- **Section 5.0** Existing and Future Competitive Employment Areas
- **Section 6.0** Supply and Demand Synopsis and Implications
- **Section 7.0** Optimal Development Areas Assessment
- **Section 8.0** Conclusions – Thornhill Employment Lands Opportunity

2.0 OVERVIEW OF THORNHILL URBAN RESERVE

2.1 INTRODUCTION

The Thornhill area encompasses 640 hectares (1,581 acres) of land just east of the Albion Neighbourhood. Much of the area is characterized by acreage residential lots and farm activity, while lands at the northern end are designated as green space and offer recreation and hiking opportunities. Altogether, there are 548 hectares (1,354 acres) of Thornhill designated in the Official Community Plan (OCP) as "Urban Reserve." None of the Thornhill area is encumbered by Agricultural Land Reserve (ALR) designation. Currently, properties in Thornhill are serviced through on-site septic systems and individual wells. The area includes many parcels that are significantly encumbered by steep slopes and water courses. steep slopes and watercourses, and the entire land area is located over the Grant Hill Aquifer.

Figure 1: Thornhill Area Boundary and Land Use Designations



The Thornhill area is home to an estimated 990 residents[1] With an owner-occupancy rate of 86%, a median household income of nearly $142,000, a median age of 40.3, and an average household size of 3.1. The area can be quite broadly characterized as "upper-middle suburbia / rural".

[1] Environics Analytics, 2020 estimate.

2.2 POLICY AND GROWTH CONTEXT

2.2.1 FUTURE GROWTH AND THE OFFICIAL COMMUNITY PLAN (OCP)

The nearly 86% of Thornhill that is designated "**Urban Reserve**" in the OCP falls within the City's Urban Area Boundary (UAB). The OCP outlines various policies for future land use and growth in this area (section 3.1.5), with one policy in particular identifying specific 'thresholds' that the City must reach before urban residential growth might proceed in this area. These thresholds are:

1. **Population of Maple Ridge exceeding 100,000 residents; and**
2. **Residential capacity approaching buildout in urban areas.**

The OCP also specifies that urban development in Thornhill must also be preceded by an Area Plan adopted by council, and an amended Regional Context Statement approved by the Metro Vancouver Board

While Maple Ridge is likely to reach the 100,000-resident threshold before the end of this decade, there is very little likelihood that any of the City's existing urban areas will reach 'buildout' in the near future. Municipal estimates of earliest possible time to reach residential build-out are around 2040 for Silver Valley and Albion, and approximately 2070 for the Town Centre, Lougheed Transit Corridor, and Hamond.[2] These are likely underestimates (particularly for the Town Centre and the Lougheed corridor), as existing built-out sites will age and become opportunities for redevelopment and intensification over time. Indeed, the concept of 'full buildout' is, and should be, a moving target as a municipality adapts and evolves over time.

Given that there is likely ample capacity to accommodate growth in existing urban areas for the next 50+ years and given emerging City priorities to direct growth in a manner that is supportive of a business case for future rapid transit expansion to the City, Council has asked for an exploration of alternate futures for Thornhill, including the possibility of using at least a portion of the land base for "employment uses." This would be supportable through current OCP policies for employment and is in alignment with the Commercial & Industrial Strategy.

2.2.2 METRO VANCOUVER REGIONAL GROWTH STRATEGY

As noted above, any urban development in the Thornhill area must be preceded by an amendment to the Regional Context Statement. At the time of writing, Metro Vancouver regional planning is still guided by *Metro Vancouver 2040: Shaping our Future.*" It is soon to be superseded by *Metro 2050*, which also coincides with TransLink's *Transport 2050* process that outlines transportation expansion and improvement priorities, and which is timed in part to allow regional land use strategy to be aligned with long-range transit growth intent. *Metro 2050* puts more emphasis on transit-oriented development in the region's future, both as a measure to help address housing affordability and to keep urban development relatively compact to reduce sprawl. Greater emphasis is placed not only on town centres, but on frequent transit development corridors such as Lougheed Highway.

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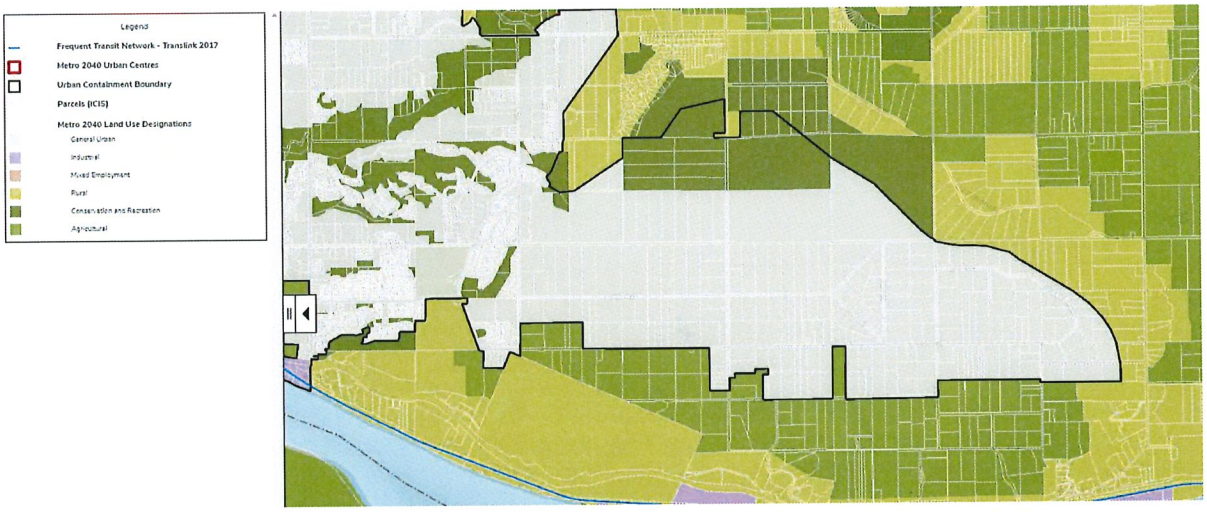
[2] City of Maple Ridge *Thornhill Background Report*, March 30, 2021.

Under *Metro 2040,* the Thornhill area is located within the Urban Containment Boundary and is largely designated as "General Urban" (with the northern portion designated "Conservation and Recreation.")[3]

Presently there are no lands in Thornhill designated for industrial or employment use, thus the need for an amendment if any alternative uses are to be incorporated into an Area Plan and associated OCP amendment.

Figure 2: Thornhill Urban Reserve – RGS Land Use Designations



2.2.3 CITY OF MAPLE RIDGE ZONING BYLAW

The majority of Thornhill is zoned for Agricultural use (A-1: Small Holding Agricultural and A-2: Upland Agricultural). Perimeter areas are zoned for residential use (RS-3: Single Detached Rural Residential). Grant Hill Park in the north is zoned for Park use (P-1: Park and School).

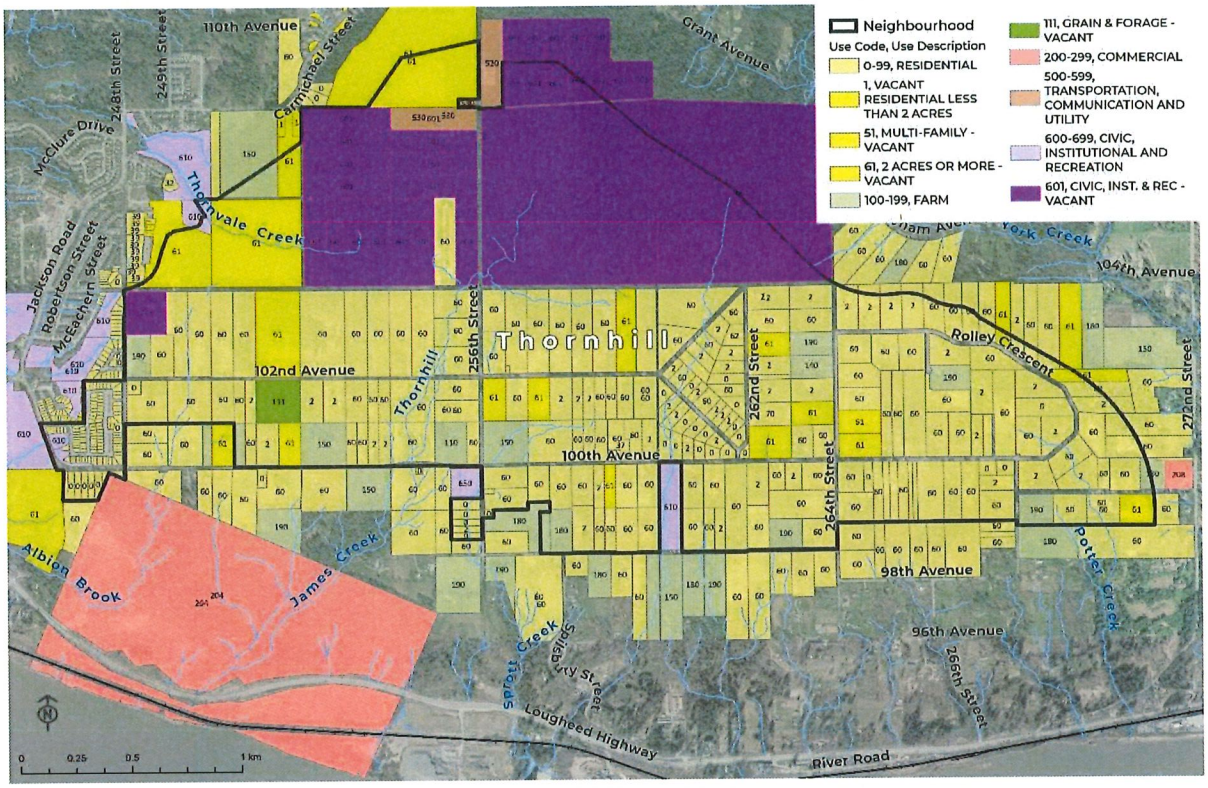
Any future land use re-designation would need to be followed by rezoning for new land uses to proceed. This may occur via pre-zoning by the City, or applicant-driven rezoning for specific parcels or parcel clusters.

2.3 CURRENT LAND USES AND OWNERSHIP

Most of Thornhill within the UCB and south of the 104th Avenue alignment is classified as being under active residential use by BC Assessment, with a variety of "2-acre lot" classifications. Active residential uses account for approximately 283 hectares (699 acres), equating to 44% of the total Thornhill land area and 56% of the Thornhill land area that is not classified as Civic, Institutional or Recreational Use. Vacant residential lands make up 112 hectares (276 acres).

[3] *General Urban* designated areas are intended for residential neighbourhoods supported by services, with emphasis on place-making, public realm, transit-oriented communities, and active transportation.

Figure 3: Thornhill Area BC Assessment Actual Land Use Classifications



Over 67% of the Thornhill land base – 430 hectares or 1,061 acres – is privately owned. Altogether there are 340 privately owned land parcels, with an average parcel size of 1.26 ha (3.1 ac) and a median parcel size of 0.89 ha (2.2 ac).

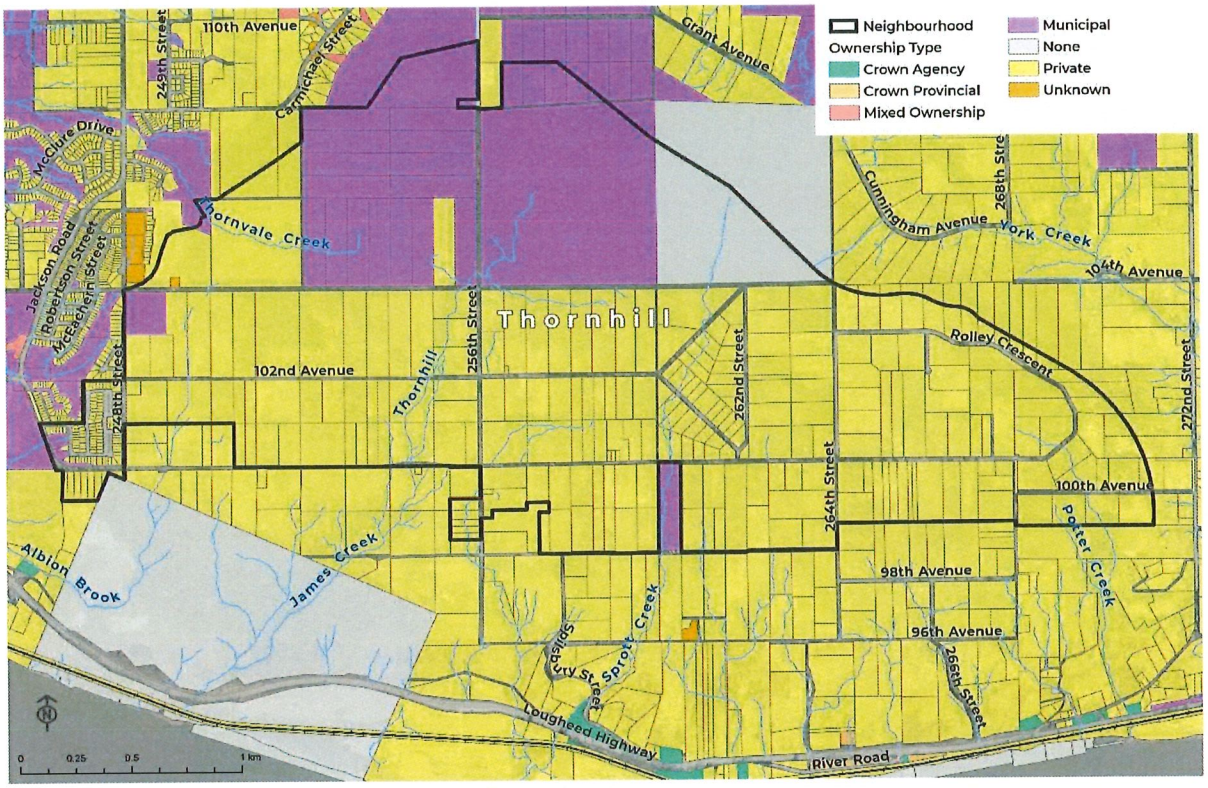
An additional 25% of Thornhill's land area – 162 hectares or 400 acres – is municipally owned. This encompasses 27 parcels with an average size of nearly 6 ha (15 ac) and a median parcel size of 3.7 ha (9.1 ac). Nearly 55% of this municipally owned land area is encompassed in two large parcels, one of 64 hectares, the other measuring just over 26 hectares.

The remaining 8% of the Thornhill land area is classified as "unknown ownership" or "no ownership." The latter is a large parcel abutting the municipally owned lands in the northern part of Thornhill.

Table 1: Ownership Classes for Thornhill Land Parcels

Ownership Class	Total Area (ha)	Parcel Count	Average Parcel Size	Median Parcel Size
Private	429.5	340	1.26	0.89
Municipal	161.7	27	5.99	3.88
Unclassified	48.8	2	n/a	n/a

Figure 4: Thornhill Area I Parcel Ownership

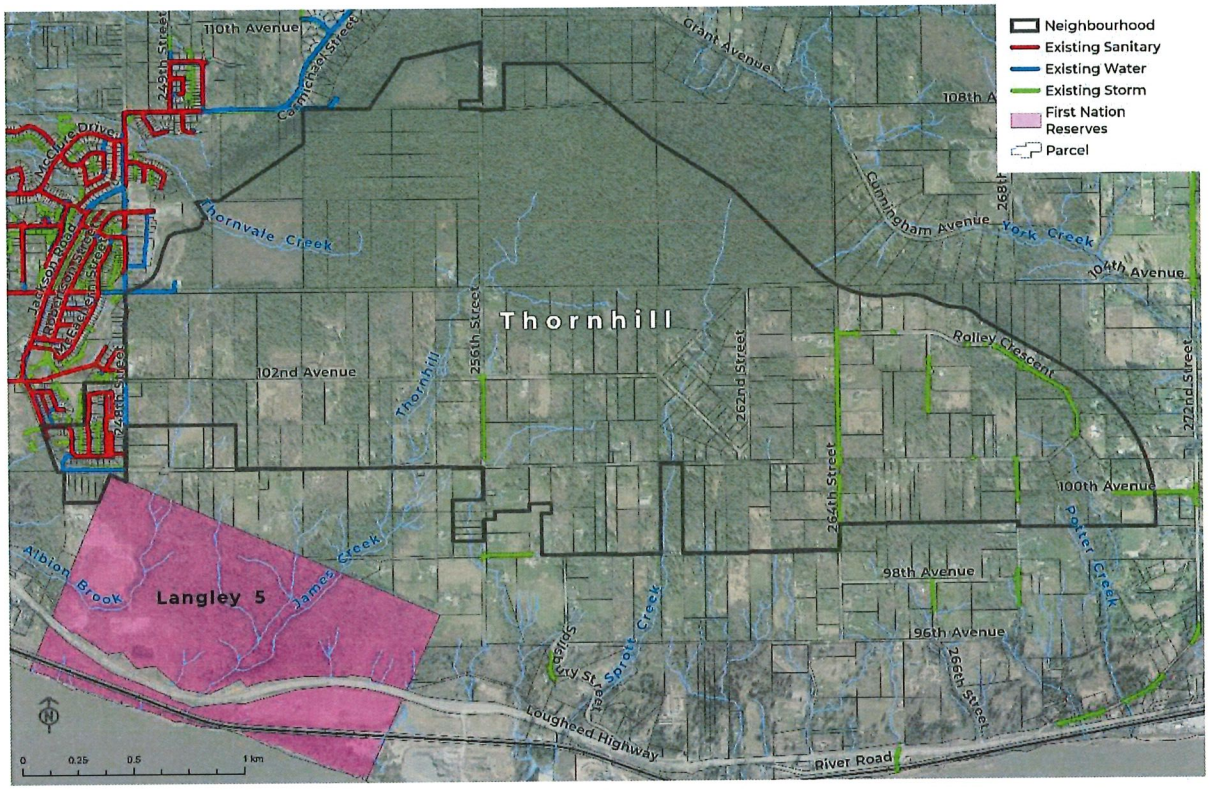


2.4 CURRENT SERVICING

Thornhill is largely without municipal water and storm service and is entirely without municipal sanitary service. Further, where services do exist, they likely do not have the capacity needed to accommodate an employment land use.

There is a current water line extending into the study area from the west along the 104th Avenue alignment. There are some stormwater improvements noted in various areas, including 256th Street, 264th Street, Rolley Crescent, and a few other areas. Extension of water services, and possibly sanitary services, would be a requirement for a future industrial / business park-type use in the area.

Figure 5: Thornhill Area Current Servicing



3.0 INDUSTRIAL MARKET TRENDS

Here we present an overview of recent industrial market statistics and trends in Metro Vancouver and the Fraser Valley, to provide context in terms of critical challenges and opportunities. Through this exploration of indicators, including vacancies, land sales, lease rates and market absorption, we can see where the industrial lands market is trending regionally, and where new industrial land offerings in Maple Ridge may fit into this broader picture.

3.1 OVERVIEW

Industrial lands are critical for supporting the economy. They serve both a regional and local economic role, and, as a facilitator of trade-oriented activities which are critical to the broader provincial and national economies.

Across the Metro Vancouver region, industrial lands comprise only 4% of the land base, but accommodate over one-quarter of the region's total employment.[4] Industrial lands host a wide spectrum of uses, ranging form large distribution and transportation lands, warehouses, and manufacturing and processing, to smaller local-serving production, suppliers and services, and newer technology-driven businesses with integrated workspaces. Each of these users has different needs for accommodation to support their operations, along with specific locational, property and building size requirements.

According to the 2021 Q2 Colliers *Vancouver Industrial Market Report*, the Greater Vancouver Area (GVA) industrial market set a record low for vacancy and record high for weighted average asking net rent for the second consecutive quarter. Also, for the fourth consecutive quarter the GVA industrial market experienced no vacancies of bulk/logistics space (>100,000 square feet).

The growth of e-commerce and related logistics/distribution operations in recent years has been boosted by the COVID-19 pandemic. This increases the demand for industrial space with highway and rail access, for warehousing and distribution facilities. The increasing activity of food production, building material and home improvement suppliers/manufacturers, traditional and refrigerated warehousing in the Greater Vancouver Area also contributes to increasing demand for industrial space. The 2020 Q4 Colliers *Vancouver Industrial Market Report* also noted that more businesses are adopting just-in-time inventory levels instead of just-in-case ones, further driving the vacancy rate of industrial space downwards and the industrial space values upwards.

The demand for more affordable and diverse options has pushed vacancy rates lower in the Fraser Valley relative to the core markets. However, there is still a greater amount of development land in the Fraser Valley. That said, overall, there is a severe lack of developable land given absorption projections (as per the 2020 Metro Vancouver Industrial Lands Inventory Report) and few available large sites for 'trade-oriented' logistics uses.

At the same time, it is reported that the rental rate differential between core and suburban industrial markets has shrunk considerably. According to Avison Young 2021 Q1 Industrial Market report, while Vancouver, Burnaby and the North Shore are still able to command premium rates compared to suburban areas, a growing bulk of demand is shifting to suburban markets (with commensurate price

[4] Metro Vancouver Regional Industrial Lands Strategy, June 2020.

pressure). This is of course sector dependent; for major logistics / warehousing / distribution users[5], transportation is by far the largest operating costs, and the ability to locate even a small fraction of time closer to a major transportation route (e.g., Highway 1) can be worth a significant price premium for land. As such, many users of this nature will select markets further out in the Fraser Valley that offer rapid Highway 1 access (e.g., Chilliwack) versus markets that are geographically closer to the core but from which Highway 1 access is more challenging.

The Avison Young Metro Vancouver Industrial Overview Report (Spring 2021) highlights that a major component of industrial investment in BC is increasingly in the form of strata unit sales, which has stimulated the continued appreciation in the value of industrial land. There has been strong demand for strata industrial units as reflected in the rapid appreciation of strata pricing and strong pre-sales activity in strata projects across the GVA. As of 2021 Q1, strata projects accounted for 30% of the total space under construction, an increasing trend given the dwindling supply of land, rising rental rates, scarcity of freestanding buildings, and relatively low interest rates.

For small and medium businesses, purchasing industrial space is seen as an increasingly attractive investment that can be used to hedge against rising lease rates and inflation. It has also been noted in the Avison Young Metro Vancouver Industrial Overview Report (Fall 2020) that strata development would potentially displace leasehold projects, which leads to upward pressure on lease rates. At the same time, it is expected that investment in industrial properties will continue to rise as the asset class outperforms other commercial real estate asset classes.

3.2 INDUSTRIAL LAND SALES TRENDS

Here we present a summary of historical industrial land sales in select Metro Vancouver and Fraser valley markets from 2018 to 2021 (to date), in terms of both prices paid, and transaction volumes.

3.2.1 INDUSTRIAL LAND PRICES

Overall, the average price paid for industrial land has increased substantially from 2018 to 2021, in all markets, but especially in markets south of the Fraser River and into the Fraser Valley market. The North Fraser market, comprising Maple Ridge, Pitt Meadows, Coquitlam, Port Coquitlam, and Port Moody, saw a combined 28.2% price increase from 2018-2021. South of Fraser Market prices increased by 112.3% and Fraser Valley markets increased by 145% over that same period. Price increases in the latter two outpaced the former primarily due to Highway 1 access.

The largest increase in price per acre of industrial land from 2018 to 2021 is found in Abbotsford and Chilliwack in the Fraser Valley Market, both with percentage increase of approximately 140%. The average industrial land prices in Langley and Surrey have also increased by 122.5% and 134.4% during the same period respectively.

Industrial land prices in Maple Ridge have more than doubled since 2018, from under $660,000 per acre, to over $1.3 million per acre.

- The most notable recent industrial land sale in Maple Ridge was the Port Hammond site, sold to Conwest in July of 2021 for $40 million ($1.31m per acre).

[5] Logistics refers to the inbound and outbound flow of goods (raw and finished) into and out of warehouses. Logistics covers transportation, internal movement, inventory and any other form of relevant information. Warehousing and logistics work in tandem.

- There was also an industrial land transaction in Kanaka Business Park in August 2021, where a 1-acre site was sold for $2.87 million ($2.87m per acre). This transaction is notable for 2 reasons:
    - There was another land sale in Kanaka Business Park only 4 months earlier (April 2021), where a 1.15-acre site sold for $1.74m. On a per-acre basis, this represents a price increase of 65% in the span of 4 months.
    - The parcel which transacted for $2.87 million had previously been sold in October 2019 for $1.25m. This represents a 130% price increase in less than 2 years.

Table 2: Industrial Land Sales, Select Markets, 2018 to 2021

Industrial land price ($/acre)	2018	2019	2020	2021 YTD	% change 2018-2021 YTD
North of Fraser Markets	**$ 1,597,681**	**$ 2,304,040**	**$ 1,605,574**	**$ 2,048,796**	**28.2%**
Maple Ridge	$ 656,936[6]	$ 1,164,675	$ 799,063	$ 1,333,632	103.0%
Coquitlam	$ 2,058,567	No data	No data	$ 4,737,341	130.1%
Port Coquitlam	$ 2,076,700	$ 2,192,086	$ 1,838,413	No data	-11.5% (2018-2020)
Port Moody	No data	11,438,224	No data	No data	No data
South of Fraser Markets	**$ 1,461,847**	**$ 1,904,642**	**$ 2,718,484**	**$ 3,103,886**	**112.3%**
Delta	$ 2,382,303	$ 2,637,446	$ 1,925,893	$ 2,931,985	23.1%
Langley	$ 1,288,374	$ 1,408,767	$ 2,603,960	$ 2,867,263	122.5%
Surrey	$ 1,410,557	$ 1,919,034	$ 3,016,569	$ 3,306,236	134.4%
Fraser Valley Market	**$ 706,022**	**$ 1,568,656**	**$ 1,447,949**	**$ 1,730,280**	**145.1%**
Abbotsford	$ 674,529	$ 1,642,321	$ 1,881,775	$ 1,616,660	139.7%
Chilliwack	$ 793,666	$ 1,320,614	$ 1,242,692	$ 1,911,482	140.8%
Mission	$ 792,247	$ 819,058	$ 1,001,620	No data	26.4% (2018-2020)

Source: Manipulated from land sale transaction records from Altus Data Studio

3.2.2 BUILT INDUSTRIAL SPACE PRICING TRENDS

Table 3 below provides a summary of the trend for built industrial space prices per square foot in select markets of Metro Vancouver and the Fraser Valley from 2018 to 2021.

Overall, the average industrial space price from 2018 to 2021 has increased in the three major markets in North of Fraser and South of Fraser Market and Fraser Valley Market by 21.9%, 46.2% and 53.7% respectively. The largest increase in price per square foot of industrial space from 2018 to 2021 (as of present) is found in Chilliwack in the Fraser Valley Market, with a percentage increase of 72.7%. The average industrial space prices in Delta and Langley have also increased by 58.8% and 56.5% during the same period respectively.

Table 3: Pricing Trends for Built Industrial Space, Select Metro Vancouver, and Fraser Valley Markets

Industrial Space Price ($/sq. ft.)	2018	2019	2020	2021 YTD	% change 2018-2021 YTD
North of Fraser Markets	**$ 279**	**$ 277**	**$ 309**	**$ 341**	**21.9%**

[6] Excluding 2 industrial land sales records of a 30.9-acre lot ($96,965/acre) and a 116-acre lot ($43,162 / acre) respectively.

Maple Ridge	$ 233	$ 194	$ 233	$ 274	17.6%
Pitt Meadows	$ 174	No data	No data	No data	No data
Coquitlam	$ 280	$ 261	$ 403	$ 324	15.7%
Port Coquitlam	$ 315	$ 329	$ 312	$ 375	18.8%
Port Moody	$ 647	$ 585	$ 526	No data	No data
South of Fraser Markets	**$ 242**	**$ 257**	**$ 281**	**$ 354**	**46.2%**
Delta	$ 254	$ 258	$ 269	$ 404	58.8%
Langley	$ 222	$ 222	$ 267	$ 347	56.5%
Surrey	$ 234	$ 268	$ 276	$ 345	47.3%
Fraser Valley Market	**$ 198**	**$ 207**	**$ 249**	**$ 305**	**53.7%**
Abbotsford	$ 203	$ 233	$ 255	$ 297	46.7%
Chilliwack	$ 195	$ 162	$ 207	$ 337	72.7%
Mission	$ 209	No data	No data	No data	No data

Source: Manipulated from industrial space sale transaction records from Altus Data Studio

3.3 VACANCY RATES

Overall, the industrial vacancy rate in the primary market and neighbouring markets maintained at levels of 2% or below. From the most recent statistics, the vacancy rate in all markets in the Fraser Valley region has fallen below 1%, which shows that there is high demand for and tight supply of industrial space.

Table 4 below summarizes the changes in the industrial space vacancy rates in the three major markets and the constituent regions from 2018 Q3 to 2021 Q3.

Table 4: Changes to Industrial Space Vacancy Rates, Select Markets, 2018 to 2021

	2018 Q3	2019 Q3	2020 Q3	2021 Q3	Change (2018 Q3 to 2021 Q3)
North of Fraser Market					
Maple Ridge-Pitt Meadows	0.60%	0.50%	1.00%	0.10%	-0.50%
Tri-cities	1.90%	1.40%	1.17%	0.45%	-1.45%
South of Fraser Market					
Delta	2.00%	0.50%	1.20%	0.50%	-1.50%
Langley	1.60%	0.50%	0.80%	0.20%	-1.40%
Surrey	1.00%	1.60%	0.90%	0.30%	-0.70%
Fraser Valley					
Abbotsford		1.30%	1.10%	0.30%	0.20%
Chilliwack	0.10%	0.80%	0.00%	0.40%	0.30%

Sources: Colliers Metro Vancouver Industrial Market Reports

In Maple Ridge-Pitt Meadows, the vacancy rate decreased from 0.6% in 2018 Q3 to 0.1% in 2021 Q3. It is noted that there is a sharp increase in vacancy rate in 2019 Q4 to over 3.4% (due to a temporary 119,306 sq. ft. vacancy in the Golden Ears Business Park) and an increase in vacancy rate during 2020 Q3 and Q4. Meanwhile, the vacancy rate in the Tri-cities has declined steadily from 1.90% in 2018 Q3 to 0.45% in 2021 Q3.

In all three regions in the South of Fraser Market, including Delta, Langley and Surrey, the vacancy was maintained at sub-2%. In Surrey, the vacancy rate firstly increased from 1.0% in 2018 Q3 to 1.6% in 2019 Q3, and then fell to 0.30% in 2021 Q3 steadily. The vacancy rate in Delta has fallen from 2.0% in 2018 Q3 to 0.50% in 2021 Q3. In the same period, the vacancy rate in Langley decreased from 1.60% in 2018 Q3 to 0.20% in 2021 Q3.

In the Fraser Valley Market, the industrial space vacancy rate slightly increased from 2018 Q3 to 2021 Q3 due to an increase in supply in 2019. Excluding 2018 Q2, the vacancy rate in Abbotsford decreased by 1% from 1.30% in 2019 Q3 to 0.30% in 2021 Q3, while the vacancy rate in Chilliwack decreased from 0.80% in 2019 Q3 to 0.40% in 2021 Q3.

3.4 NEW INDUSTRIAL SPACE SUPPLY AND ABSORPTION STATISTICS

Any newly built industrial space in the Metro Vancouver market has absorbed rapidly in recent years. According to the industrial market report by Avison Young, 82% of the approximately, 1.3 million square feet of new industrial space inventory that was delivered in the second and third quarters of 2021 was preleased/presold as of 2021 Q1. As a result of this pattern of 'pre-commitment' of new space, the current delivery of new space for lease is unable to fulfill growing latent demand and thus alleviate chronically tight vacancy.

The following table summarizes the trend of new supply and absorption in the North of Fraser Market and two other nearby markets for comparison. In all three markets in North of Fraser, South of Fraser and Fraser Valley Market, the net absorption of industrial space each year has been higher than the new industrial supply (except in 2019 when there was a large increase in new supply in Maple Ridge-Pitt Meadows in the North of Fraser Market).

Table 5: New Industrial Supply and Net Absorption, Select Markets, 2018-2021

	NEW INDUSTRIAL SPACE SUPPLY (SQ. FT.)					NET ABSORPTION (SQ. FT.)				
	2018	2019	2020	2021 YTD (As of Q3)	Change from 2018 to 2020	2018	2019	2020	2021 YTD (As of Q3)	Change from 2018 to 2020
North of Fraser Market	367,445	932,697	354,883	349,993	-3.4%	533,411	329,079	469,358	514,543	-12.0%
Tri-cities	283,214	312,281	354,883	349,993	25.3%	371,799	224,777	389,907	460,981	4.9%
Maple Ridge-Pitt Meadows	84,231	620,416	0	0	-100.0%	161,612	104,302	79,451	53,562	-50.8%
South of Fraser Market	2,238,552	2,168,767	3,076,156	830,063	37.4%	2,465,092	2,563,751	3,150,365	1,269,289	27.8%
Delta (including TFN land)	1,190,382	645,330	716,934	255,224	-39.8%	1,291,985	1,064,350	629,733	335,061	-51.3%
Langley	235,856	131,653	299,828	252,538	27.1%	238,420	379,030	178,447	406,663	-25.2%
Surrey	812,314	1,391,784	2,059,394	322,301	153.5%	934,687	1,120,371	2,342,185	527,565	150.6%
Fraser Valley	286,459	676,613	325,244	164473	13.5%	267,538	1,088,659	356,833	184813	33.4%
Abbotsford - Chilliwack	286,459	676,613	325,244	164,473	13.5%	267,538	1,088,659	356,833	184,813	33.4%

Sources: Colliers Metro Vancouver Industrial Market Reports

In the North of Fraser Market, new industrial space supply remained steady throughout the period (except in 2019). There has been an increasing trend in new industrial space supply and net absorption in the Tri-cities area. As of the third quarter of 2021, both the new industrial space supply and net absorption in Tri-cities reached the level of 2020. However, the trends for both new industrial space supply and net absorption in Maple Ridge-Pitt Meadows are downwards, where there has not been any new industrial space supply available on market recorded after 2019.

In South of Fraser Market, both the new industrial space and net absorption are growing from 2018 to 2020 following similar growing trend, which shows that the new industrial spaces are absorbed in a similar rate as the supply launches the market. In Surrey, there has been a significant increase in industrial space supply and net absorption from 2018 to 2020 by 153.5% and 150.6% respectively. Meanwhile, there is an increasing trend in the amount of new industrial space and net absorption in Langley. Though the absorption in 2020 has dropped, both the new industrial space supply and net absorption as of third quarter in 2021 has reached the highest level in 2020 and 2019 during the 3-year period respectively. In Delta, there are downward trends of industrial new space supply and net absorption, which fell by 39.8% and 51.3% respectively from 2018 to 2020.

In the Fraser Valley Market, there was a jump in both new industrial space supply and net absorption in 2019, and the increased by 13.5% and 33.4% from 2018 to 2020 respectively.

3.5 TREND OF ASKING LEASE RATES (NET)

Table 6 summarizes the trend of lease rates (based on net rates) in regions in selected markets. Results show that the lease rate in all regions increased from 2018 Q3 to 2021 Q3. Surrey in the South of Fraser Market has the highest percentage increase in lease rates.

Table 6: Asking Lease Rates, Select Markets, 2018 to 2021

Lease rate ($ / sq. ft. / year)	2018 Q3	2019 Q3	2020 Q3	2021 Q3	Change from 2018 Q3 to 2021 Q3
North of Fraser Market					
Maple Ridge-Pitt Meadows	$9.24	$ 10.55	$ 12.51	$ 13.00	40.7%
Coquitlam	$ 13.40	$ 14.35	$ 13.98	$ 17.89	33.5%
Port Coquitlam		$ 13.48	$ 13.54	$ 15.02	12.1%
Port Moody		$ 8.00	No data	No data	
South of Fraser Market					
Delta	$ 9.18	$ 10.34	$ 11.74	$14.67	59.8%
Langley	$ 11.31	$ 13.56	$ 11.95	$ 13.66	20.8%
Surrey	$ 8.75	$ 10.81	$ 11.83	$14.08	60.9%
Fraser Valley					
Abbotsford	$9.44	$ 11.41	$ 11.63	$ 12.61	33.6%
Chilliwack		$ 9.86	$ 12.50	$ 14.08	49.2%

Source: Colliers Metro Vancouver Industrial Market Report

3.6 SPACE UNDER CONSTRUCTION

Table 7 summarizes the amount of industrial space actively under construction in the Greater Vancouver Area as of 2021 Q3, and at the same point in time back to 2018. Surrey in the South of Fraser Market has the highest amount of industrial space that is under construction at present. The space under construction in the Maple Ridge – Pitt Meadows market is occurring at the Golden Ears Business Park.

Table 7: Industrial Space Under Construction by Quarter, Select Markets

	INDUSTRIAL SPACE UNDER CONSTRUCTION (SQ. FT.)			
	2018 Q3	**2019 Q3**	**2020 Q3**	**2021 Q3**
North of Fraser Market	**663,953**	**593,093**	**675,642**	**797,788**
Maple Ridge-Pitt Meadows	220,476	0	0	380,788
Coquitlam	443,477	0	0	0
Port Coquitlam		593,093	675,642	417,000
Port Moody		0	0	0
South of Fraser Market	**1,474,344**	**2,994,939**	**1,617,109**	**3,195,786**
Delta (including TFN Lands)	493,100	680,484	450,788	784,503
Langley	207,847	372,878	352,147	238,995
Surrey	773,397	1,941,577	814,174	2,172,288
Fraser Valley	**1,006,370**	**267,174**	**459,231**	**239,802**
Abbotsford	1,006,370	267,174	459,231	239,802
Chilliwack		0	0	0-

Source: Colliers Metro Vancouver Industrial Market Report

Below are some of the major industrial projects that are under construction, classified by market area.

3.6.1 NORTH OF FRASER MARKETS

Market	Building Name / Address	Estimated completion	Total Size (sq. ft.)	Owner / Developer	Category	Occupancy situation / Notes
Pitt Meadows	Eagle Meadows Business Park	2023 Q2	375,000 - 400,000	Epta Development Corporation (EDC)	Industrial complex for lease	Development Project with Katzie First Nation. Currently building plan under review
	Golden Ears Business Park Phase 3	2022 Q3 (building 200) 2022 Q4 (building 300)	Bldg. 200: 177,000 Bldg 300: 111,000	Onni Group	Small bay (200) and Large bay (300) industrial warehouse for lease	Bldg. 200 demised in to 19,713 sq.ft. units Bldg. 300 demised into 4,459 sq.ft. units. Both offer 32' ceilings
Tri-cities (Coquitlam)	WesGroup/Pacific Reach Industrial Centre / 11 King Edward St	No information available	196,000	WesGroup / Pacific Reach		Approved in July 2021

Sources: Colliers Metro Vancouver Industrial Market Report, Avison Young Metro Vancouver Industrial Overview Report (Spring 2021)

3.6.2 SOUTH OF FRASER MARKETS

Market	Building Name / Address	Estimated completion	Total Size (sq. ft.)	Owner / Developer	Category	Occupancy situation / Notes
Delta	Delta iPort Building 2 - 4189 Salish Sea Way	2020 Q2	485000	GWL / HOOPP	SPEC - Lease	100% leased Asking lease rate: $14.5/sq. ft.
	Velo - 7400 Vantage Way	2021 Q2	203,172	Conwest	Distribution Center for lease	100% Leased by Amazon as tier-1 distribution centre
	River Road Distribution Centre / 8576 River Road	2022 Q1	373,000	Wesgroup	Distribution Center for lease	100% Leased
	Progress Way Business Centre - 7672 Progress Way, Delta, BC	2022 Q3	147,500	Beedie	Strata	85% Sold Asking sale price: $525/sq. ft.
Langley	60th Ave Business Centre / 27466 60th Avenue	2021 Q4	62,440	Beedie	Strata - Warehouse	100% Sold
	Wesmont Centre - 6286 203 Street, Langley, BC	2022 Q1	123,207	Wesmont	Strata	60% Sold Asking sale price: $465-547/sq. ft.
Surrey	Thirty8 Avenue Business Centre 19155 38 Avenue	2020 Q4	147,542	Beedie	SPEC – Strata	100% sold Asking sale price: $325-350/sq. ft.
	Commerce Valley - 19333 & 19339 34A Avenue	2021 Q3	61,749	PollycoGroup of Companies / SKG	SPEC – Strata	30% sold 53% under contract (as of June 2021) Asking lease rate: $12.5/sq. ft.
	Parallel 32 / 19225 32nd Avenue	2022 Q4	13,113 to 192,016	Beedie	Industrial complex for lease	Currently under planning state

Sources: Colliers Metro Vancouver Industrial Market Report, Avison Young Metro Vancouver Industrial Overview Report (Spring 2021)

3.6.3 FRASER VALLEY MARKETS

Market	Building Name / Address	Estimated completion	Total Size (sq. ft.)	Owner / Developer	Category	Occupancy situation / Notes
Abbotsford	King Business Park / 31779 & 31789 King Road	2021 Q3	112,372	Cedar Coast	Strata - Sale	100% Sold
	Windsor Industrial Park / 2105/2117 Windsor Street	2021 Q4	49,096		Warehouse units for lease	75% leased
	Xchange Business Park / 3707 Mount Lehman Road	2022 Q2	1,200,000	QuadReal Property Group, and Hungerford Properties	Warehouse units for lease	

Sources: Colliers Metro Vancouver Industrial Market Report, Avison Young Metro Vancouver Industrial Overview Report (Spring 2021)

Of note is the City of Abbotsford's recent change to its industrial zoning bylaw to allow for up to 40% of floor space to be used for office, retail, rental, and product display, if goods are manufactured or warehoused on-site. This is effective from May 2021. Previously, only 25% of space was permitted for such uses. This bylaw change will also permit indoor recreation facilities to operate in industrial zones.

3.7 IMPLICATIONS

Industrial land values, lease rates, selling prices, absorption and vacancy all reflect the relative scarcity of good industrial land parcels across the region, the increased competition for industrial lands from other uses, the conversion of industrial lands in the region to other uses, and speculation that industrial densities will increase. Across the region, we have seen rapid changes to the supply and demand dynamics for industrial lands. Demand and competition have increased, while supply has been stagnant or declining (depending on the sub-market). Demand continues to outpace the ability to bring new spaces to market.

The trends in Maple Ridge are broadly reflective of the story in the region:

- Rapid price growth for industrial parcels
- Rapid price growth for built strata industrial space
- Upward pressure on industrial lease rates
- Low vacancy rates
- No new supply coming to market in the near term
- No land on which significant amounts of new industrial space could be immediately constructed.

There are new industrial land opportunities on the horizon in Maple Ridge (discussed in Section 5) which could, individually or collectively, fulfill projected demand for many years. Projections of need in Maple Ridge are discussed in Section 4 below. However, it remains unknown when these new industrial areas could be brought to market, or indeed how many of these projects will proceed beyond the conceptual stage. Further, in the time it takes to bring new industrial areas to market, latent demand for land and built space (both locally and regionally) will continue to grow.

Within that context, an industrial project in the Thornhill area may be tenable, particularly for certain end-users looking for relative affordability and which do not necessarily need very large, flat sites close to major highways. This viability, however, would be contingent on solving issues of access and servicing, both of which are likely to be costly and complex.

Section 4 examines the likely demand for industrial lands in Maple Ridge, and how that may break down by industry sector. This leads to a review of current and future supply in Section 5, leading into a discussion of demand, supply, and the extent of opportunity in Thornhill in Section 6.

4.0 INDUSTRIAL DEMAND ASSESSMENT

4.1 INTRODUCTION AND APPROACH

All the indicators discussed in Section 3 above point to a dearth of industrial land and building supply and a growing latent demand that cannot be effectively fulfilled across the Metro Vancouver and Fraser valley regions. While Maple Ridge's industrial lands play a relatively small role in the broader regional picture, they are nevertheless an important part of the regional industrial lands story. Demand drivers and trends at the regional level will impact local level demand, and different types of industrial supply brought to market at different locations will serve the variety of end-user needs across the industrial spectrum.

This section provides an assessment of what that future demand may look like in Maple Ridge.

4.1.1 INPUTS FOR DEMAND ASSESSMENT

To assess Maple Ridge's economy today and project where it may go in terms of employment growth by sector (and associated industrial land need), our assessment relies on a variety of data sources:

- Metro Vancouver – regional and Maple Ridge population and employment data, and projections by industry sector.[7]
- Statistics Canada custom data orders showing place of work status in Maple Ridge, by industry sector, for Maple Ridge residents and inbound commuters (2016)
- Metro Vancouver's *Regional Industrial Lands Strategy* (June 2020)
- City of Vancouver's *Employment Lands and Economy Review* (Sept. 2020)
- Sectoral / market reports from brokerage firms
- Interviews with industrial / commercial brokers and developers familiar with employment lands markets in Maple Ridge and beyond
- *Maple Ridge Commercial & Industrial Strategy*, specifically the underlying data used to convert employment growth to industrial need.

4.1.2 APPROACH TO EMPLOYMENT AND LAND FORECAST SCENARIOS

Multiple forecast scenarios were prepared for Maple Ridge, each tethered to a high, medium, or low employment growth future for the Metro Vancouver Region overall. The scenarios were guided by what we know from the recent past and trends to present, while considering different future trajectories that could shift growth at local and regional levels.

Step 1 – Metro Vancouver Employment Growth

We begin with three future employment growth scenarios for the Metro Vancouver region, prepared by Metro Vancouver for the *Metro 2050* regional plan. These scenarios each assume a different future trajectory for the region's economy overall, with a 30-year (2021-2051) employment growth range from 28% to 36%, with a mid-point of 31.5% (2021 to 2051). This represents absolute job growth region-wide

[7] Draft projections and allocations for *Metro 2050* were provided by the City of Maple Ridge.

between 386,000 and 522,000 over 30 years, with a mid-point of 454,000. *The medium regional growth scenario is used to create the baseline or reference growth projection for Maple Ridge.*

Step 2 – Maple Ridge Employment Distribution

We then look at a combination of Metro Vancouver municipal-level employment forecasts (by industry sector) and Statistics Canada's place-of-work data by industry sector for Maple Ridge. These data sets are used to derive and project the following:

- Expected employment growth in Maple Ridge to 2051, as per *Metro 2050* draft (note: this data set is used only for the baseline scenario);
- The *proportion* of total Maple Ridge jobs occurring in any given industry sector, in each year, from 2021 to 2051; and
- The proportion and number of Maple Ridge jobs in any given industry sector that are expected to occur at a *usual place of work* not at home, and with no fixed place of work.[8] It is primarily the jobs with a usual place of work that will require employment land.

Step 3 - Job Allocation by Land Use Category

The next step is converting projected employment, by sector, to different land use categories. For this study we use three broad land use categories:

- Office
- Population-related employment
- Industrial

Each category is comprised of a mix of jobs across various industry sectors, primarily characterised by the job types most likely to be present within each. The job growth outlook for each land use category is therefore a composite of the individual forecasts for those categories' component sectors.

The land use categories used in this report are adapted from work prepared for the City of Vancouver's Economy and Employment Lands Review. A general description of each typology is provided in Table 8 below. Note that the description of "primary industry sectors" for each typology is not meant to be exclusive, as most sectors have some proportion of their jobs in each land use category.

Allocations of jobs to each land use category vary sector to sector and are based on both historical job allocation data used in the *Maple Ridge Commercial & Industrial Strategy*, alongside sectoral share allocation information gathered from other municipalities.

[8] While jobs with no fixed place of work do not directly require employment land, there are possible employment land implications for these types of jobs. For instance, a construction worker may move from site to site, but may still store tools and vehicles at a central location. There may be a service provider (e.g., plumbing, electrical) who similarly moves about the region, but has a shop or office.

Table 8: Land Use Typology Descriptions and Primary Industry Sectors

Land Use Category	Description	Primary Sectors
Office	Jobs that usually occur in office buildings, or in office components of mixed-use buildings, in which the office space is at least 15,000 square feet. Businesses in this category will often seek central locations with access to amenities and transit.[9] While most major office space is distributed in major regional concentrations (e.g., Vancouver's Central Business District; Broadway corridor; Metrotown), there are companies and other entities in smaller municipalities that will still seek out office space in more central locations of those municipalities.	• Finance, Insurance • Real Estate • Professional, scientific, and technical services • Management of companies
Population-Related: Commercial and Institutional	This broad category includes employment activities that primarily serve the local resident population and tourism uses. Sector types include retail, hotel, restaurants, small service commercial offices, schools, hospitals, post-secondary institutions, and government buildings. Commercial businesses in this category can be accommodated in a wide range of built forms, including standalone shops, malls, and/or mixed with other uses including residential. Institutional uses typically require larger sites and buildings and may be planned separately from other population-serving uses.	• Retail trade • Arts, entertainment, and recreation • Accommodation and food services • Educational services • Health care and social assistance • Public administration
Industrial	Uses accommodated in low-rise industrial-type buildings or 'land-intensive' uses. These often involve activities related to production, distribution, and repair. Most (but not all) of these uses are typically not compatible with uses like residential. In many cases, businesses in these areas support other businesses, both within the City and across the region. Examples of these uses include manufacturing, distribution and wholesale, warehouse, vehicle repair / disposal, and business parks.	• Manufacturing • Wholesale trade • Transportation & warehousing • Film production
Work at Home / No Fixed-Place of Work	A category representing employment activity that is either home-based or does not typically report to a specific place of work, such as construction workers, truck drivers and taxi / ride share operators. Employment in these categories may not directly create demand for additional floor space in any of the other categories but may induce some demand. This induced demand is captured within floor-space-per-worker trends of other categories.	• Construction • Realtors • Telecommuters across sectors.[10]

Step 4 – Convert Jobs on Industrial Land to Industrial Land Need

Projected job numbers on industrial land are converted into a forecast for land demand based on assumptions of floor space per worker and built density.

[9] Transit as a commuting mode has historically been quite low in Maple Ridge; however, ridership will likely increase over time with the introduction of RapidBus service between Maple Ridge and Coquitlam Centre.
[10] Within Metro Vancouver, the top 3 work-at-home sectors in 2016 were: (1) Real estate (26%), (2) Professional, scientific, and technical services (21%), and (3) Agriculture, forestry, fishing, and hunting (17%).

For this exercise, we used data that was gathered and analysed as part of the *Commercial & Industrial Strategy*, whereby estimates of job density in Maple Ridge, by industry sector or sector cluster, were created using a GIS analysis that overlaid parcel fabric, building footprints, BC Assessment actual use codes, and Environics Analytics "DaytimePop" database.

Step 5 – Develop Forecast Scenarios and Repeat Above Steps

Five future growth scenarios were developed in total, each based on different assumptions of regional growth and the role that Maple Ridge may play in accommodating that growth. The assumptions for each of those scenarios are as follows:

- **Reference Scenario –** adopts Metro Vancouver's medium growth scenario for the region, and its corresponding medium growth scenario for Maple Ridge.
- **Scenario 2 – Higher Regional Growth + Constant Maple Ridge Share**: The region sees overall growth that is 15% higher than in the reference scenario. Maple Ridge maintains a stable share of that growth, equal to the share in the reference scenario.
- **Scenario 3 – Lower Regional Growth + Constant Maple Ridge Share**: the region sees growth at a slower than historic rate, and Maple Ridge maintains a stable share of that growth.
- **Scenario 4 – Higher Regional Growth + Higher Maple Ridge Share**: The region sees stronger overall growth as described in Scenario 2, and the north-of- Fraser markets play an increasing role in that growth.
- **Scenario 5 – Lower Regional Growth + Lower Maple Ridge Share**: the region sees growth at a slower than historic rate, and that growth is increasingly being concentrated in the central markets through land intensification, resulting in a declining share of growth in Maple Ridge.

Forecasts of industrial land demand for each of the five scenarios are presented as demand by 10-year period, to 2051. These demand assessments are compared to existing and future supply (Section 5) to identify potential for new industrial uses in Thornhill.

4.1.3 INTERVIEWS WITH BROKERS AND DEVELOPERS

To both supplement the analysis described above and provide input on future scenarios based on industry experience, we conducted interviews with 6 industrial / commercial brokers and developers familiar with the industrial lands market in Maple Ridge. Most of these interviewees were reached out to on multiple occasions throughout the project, as new questions came to light and more detail or clarification was required.

Key demand-related themes that were explored with interviewees included:

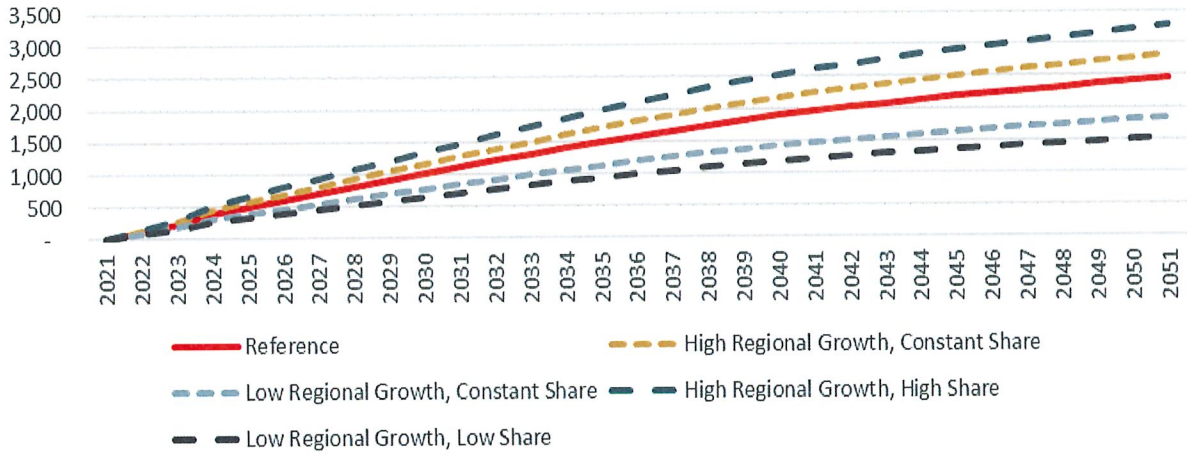
- Perceived levels of demand for new industrial lands in Maple Ridge and other north Fraser communities
- Sources of demand, both by sector and by geography (e.g., are there users in Surrey, Coquitlam etc. who would come to Maple Ridge, and if so, who are they and what do they need?)
- What demand looks like by sector, in terms of location, visibility, access, site size, site configuration.
- Perceptions of opportunity and challenges in Thornhill, and criteria for success.
- Possible pace of absorption for industrial project in Thornhill.

4.2 EMPLOYMENT FORECASTS AND INDUSTRIAL LAND DEMAND

The forecasts for net new jobs on industrial land under the 5 growth scenarios are presented in Figure 6 below. Figure 7 illustrates the implied total industrial land demand associated with each scenario.

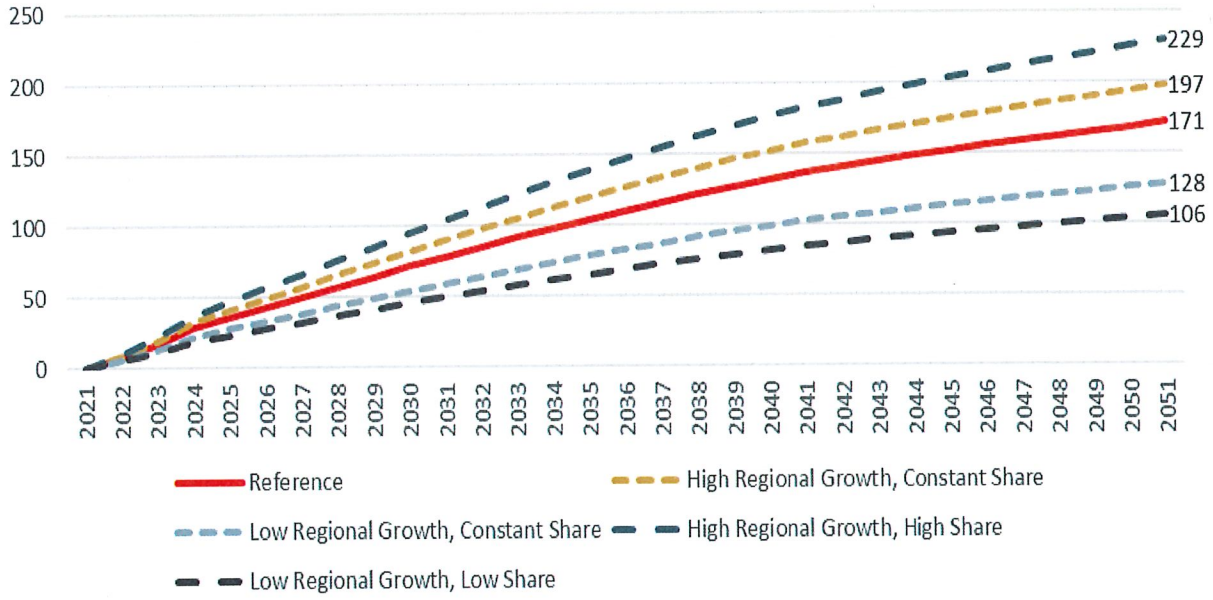
Employment projections call for the addition of between 1,500 and 3,200 net new jobs on industrial land in Maple Ridge over the next 30 years, or an average of 51 to 110 jobs per year. The reference scenario, based on medium regional growth and a constant share of growth to Maple Ridge, call for just under 2,500 new industrial jobs by 2051.

Figure 6: Forecast Comparison – Incremental Employment Growth on Industrial Lands



The above employment forecasts translate into industrial land demand ranging from a low of 106 acres to a high of 229 acres over 30 years, or an average of 4 to 8 acres per year.

Figure 7: Forecast Comparison – Cumulative Industrial Land Demand (ac), City of Maple Ridge, 2021-2051



4.3 INTERVIEW COMMENTARY

Below is a thematically grouped synopsis of information gathered through interviews with developers and brokers active in Maple Ridge. Through these interviews, we were able to gather broad insights on the overall need and opportunity for new industrial lands in Maple Ridge generally, along with specific commentary on a future industrial land use in Thornhill and the likely sectors it would attract.

4.3.1 TARGET USERS AND USE SECTORS

There was a broad consensus that the primary source of demand for industrial land and buildings in Thornhill would be from small to medium scale local operators, and particularly those interested in owning their own property or individual strata units.

The sectors from which most demand is likely to originate are:

- Primary resource sectors
- Construction and related trades
- Broad range of manufacturing (e.g., food, wood, metal, machinery)
- Business / commercial services
- Professional / Technical services

While much of the industrial land demand in the region is driven by transportation, logistics and warehousing operators seeking big sites, that sector is not expected to be a source of demand for industrial lands in Thornhill. This will still be the case even if a new access point to Thornhill is created, allowing for easier access to the Lougheed Highway. Such an access point would be a prerequisite for any industrial land use of any scale in Thornhill, regardless of sector.

Active businesses with an interest in relocation or expansion to Thornhill would mostly be located in the Dominion Triangle, Port Kells, Mission, and elsewhere in Maple Ridge. There are businesses in these locations that are actively seeking expansion or relocation opportunities in lower-cost environments, do not necessarily require Highway 1 proximity, and are seeking areas with outdoor yard space.

4.3.2 INDUSTRIAL DEVELOPMENT LOCATION AND FORM

An industrial park in Thornhill would need to have access to the Lougheed Highway. There is currently no good access for industrial land users. If a new road were to be built, any industrial park would need to be located as close to this road as possible.

Recommendations for development form are as follows:

- Offer a range of lot sizes, as small as a half-acre, and up to 10+ acres, with the potential to assemble into larger parcels. There may be a few land-intensive users that would consider 20+ acre assemblies.
- Provision of yard space is essential and is being sought by many businesses. There is often a lack of flexibility in this regard from many newer light industrial developments, including what is likely to emerge at Hammond Mill and Hammond Business Park.
    - One broker commented on the "cookie-cutter" nature of many modern light industrial projects, and that they almost universally lack yard space for outdoor storage of equipment, staging etc.

4.3.3 SCALE OF DEMAND AND PACE OF ABSORPTION

The market for industrial lands is highly constrained, and further tightening is on the horizon. In this context, the potential for a new industrial development in Thornhill will attract interest.

It has been suggested that an industrial development of between 50 and 100 (or more) acres could be successful in Thornhill, provided that the up-front costs to bring in the infrastructure, perform required earthworks, and develop the lots, can be carried until sufficient revenues can be achieved.

Generally speaking, the higher the up-front costs to service, the larger the development will need to be to warrant the project moving forward. There will need to be costing and pro forma analysis done to determine if such a project could "pencil".

From a market absorption perspective, it has been suggested that an average of 5 acres could be sold to businesses / end-users per year. However, the absorption rate will ultimately depend on overall market strength, pricing, and competitive product in the immediate and surrounding market at the time the project launches. Further, there may be increased pressures on the City to pay for growth-related infrastructure costs.

4.3.4 OTHER CONSIDERATIONS

A new industrial development in Thornhill will face complications that need to be resolved before the project could move forward. These include:

- Access solutions, including consultations with Kwantlen First Nation
- Environmental, geotechnical, and other assessments
- Servicing solutions (likely to also require consultations with Kwantlen First Nation)
- Land assembly
- Grading

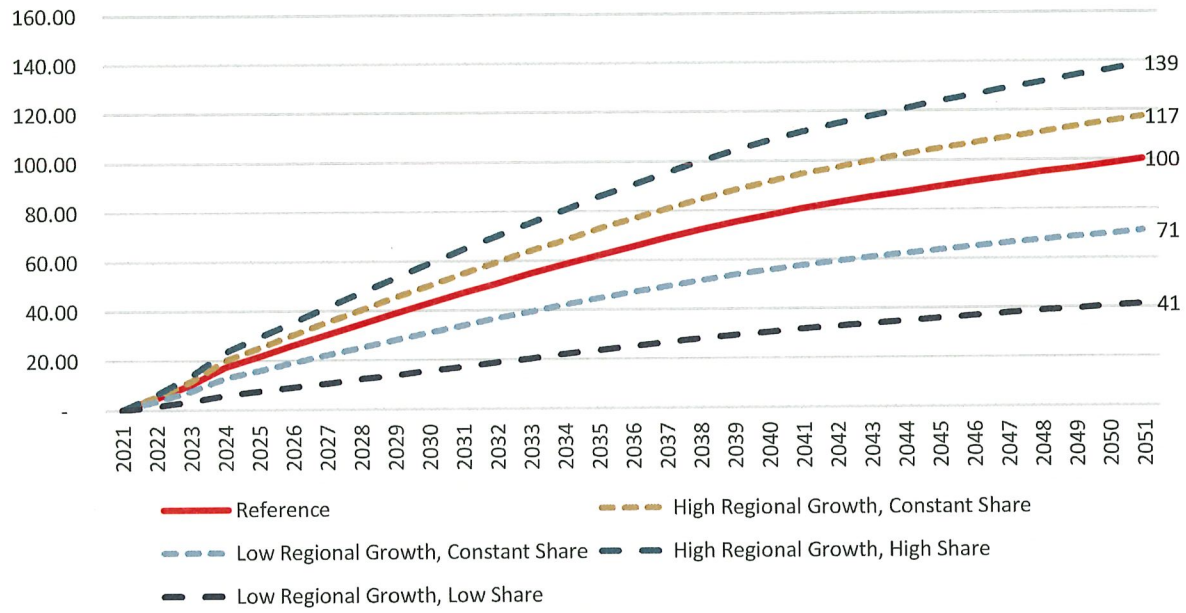
It was also suggested by multiple interviewees that consideration of Thornhill for industrial uses, and the associated infrastructure investments it would require, should take into account the broader potential industrial landscape, specifically the Maple Ridge Industrial Reserve. Both the Reserve and Thornhill would require new roads to be made viable (Abernethy Way connector for the former, new connection from Lougheed for the latter). Both areas would likely be appealing to similar industrial sub-sectors. Some have suggested that opening the Industrial Reserve and connecting it via Abernethy to Golden Ears Bridge should be the City's priority before looking to Thornhill.

4.4 DEMAND FROM TARGET SECTORS

As discussed in 4.3.1 above, there are specific industry sectors that would be the most likely target users for a future industrial area in Thornhill, or another similar area (e.g., Industrial Reserve accessed via Abernethy Way).

Converting the employment forecasts in those sectors to industrial land need under the five growth scenarios, we see demand ranging from a low of 41 acres to a high of 139 acres over a 30-year period, or an average of 1.4 to 3.9 acres per year.

Figure 8: Forecast Comparison – Cumulative Industrial Land Demand (ac) in Target Industry Sectors, 2021-2051



This is the primary pool of demand that Thornhill would be looking to capture.

5.0 EXISTING AND FUTURE COMPETITIVE EMPLOYMENT AREAS

5.1 INTRODUCTION AND CONTEXT

With an understanding of future demand, here we turn to a review of current and future industrial land supply. This assessment, together with the projections of demand (by industry sector) and information from broker / developer interviews, allow us to identify the possible extent of market opportunity for industrial uses in Thornhill.

The demand scenarios presented in Section 4 inherently reflect different industrial land availability futures in the community. For instance:

- Land demand scenarios where Maple Ridge sees a *decreasing* share of regional growth were developed around an assumption that supply of industrial options in the City remain somewhat constrained, and that businesses instead find opportunities elsewhere in the region.
- Land demand scenarios where Maple Ridge maintains a *stable or increasing* share of regional growth reflect an assumption that the industrial land supply is sufficient in terms of amount and variety to create opportunities for a wide range of industrial end-users and includes the possibility of attracting growth that would otherwise have occurred in other communities.

The *Commercial and Industrial Strategy* (2014) noted significant constraints on the Maple Ridge industrial land base.

- Without considering the City's "Industrial Reserve" lands, at the time it was identified that the City had 90 acres of developable industrial land available, mostly in the Albion Industrial Area.
- The Albion Industrial Area has significant redevelopment constraints, most significantly its location within the Fraser River floodplain.
- Excluding the Albion Industrial Area and the Industrial Reserve lands, Maple Ridge had only 6 acres of readily developable industrial lands available.

That document also identified ample future industrial lands in the northern parts of the community (i.e., the Industrial Reserve), but with the following caveats:

- Industrial Reserve lands would not be of interest to most industrial developers or end-users due to their relative isolation and access challenges ***unless the access issue could be resolved.***
- Success of the Websters Corner project and slow but increasing uptake at the Kanaka Business Park are indicative of ongoing demand for these areas amongst certain sub-sectors (e.g., smaller scale, localized industrial businesses).
- Attracting more users to these areas of land availability would require access improvements, most notably the Abernethy connector extension to 256th Street.

This section does not provide an updated comprehensive audit of industrial land availability and utilization across the City. Rather, it presents a higher-level assessment of current and future industrial land supply in Maple Ridge through a lens of future viability and desirability of industrial lands in Thornhill.

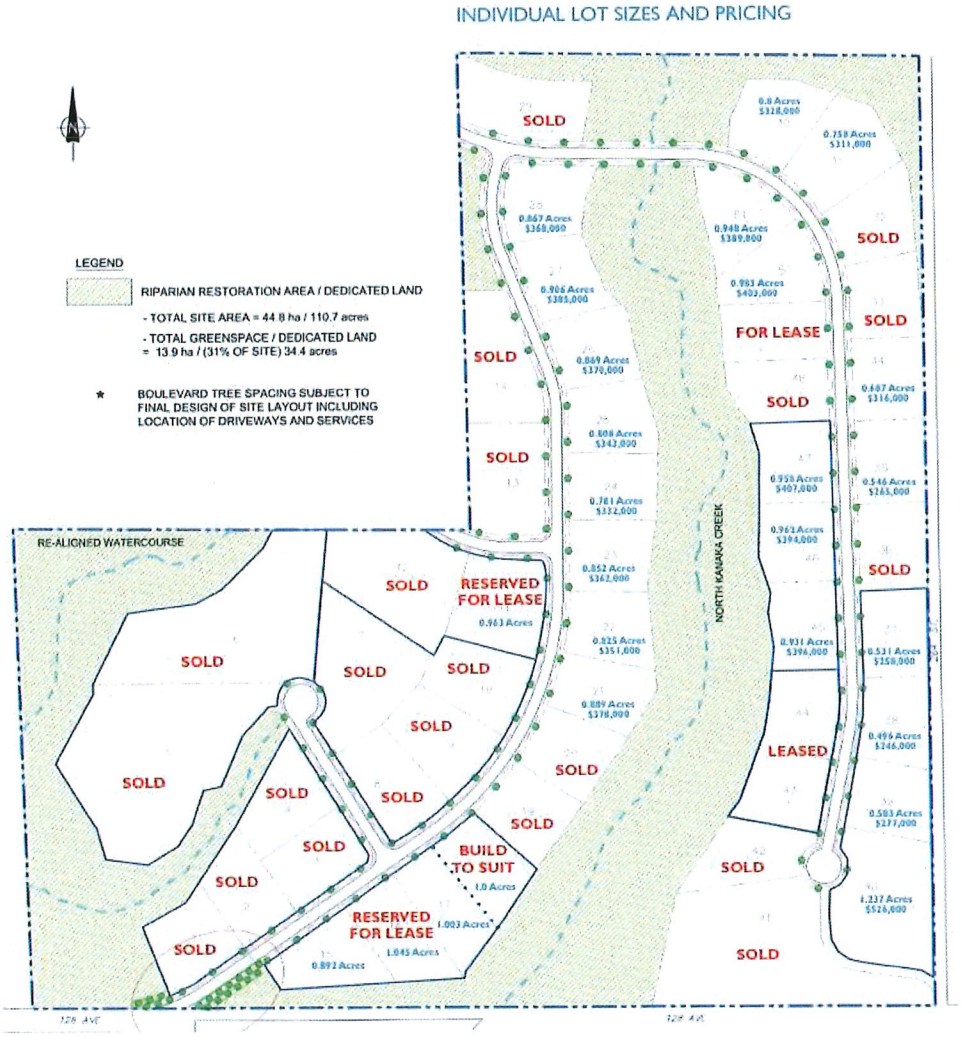
5.2 EXISTING INDUSTRIAL AREAS

Here we present a brief overview of active industrial areas in Maple Ridge, and some commentary on their implications for future demand at Thornhill. This is not a comprehensive review of every industrial area in the City; rather, we focus on areas that offer some degree of competitive overlap with a future industrial use in Thornhill.

5.2.1 KANAKA BUSINESS PARK

Located north of Thornhill at 128 Avenue east of 256th Street, the Kanaka Business Park is a 44.8-hectare (110.7 acre) business park built atop what was the Kirkpatrick Gravel Pit. Approximately 31 hectares (76.3 acres) of the park are demised into builder-ready industrial lots, with the balance accounting for green space and otherwise dedicated lands. The Park has a range of lots sizes, from 0.5 to 15+ acres. The area is zoned M2, which allows for: manufacturing, distribution, service, assembly, outside storage uses, and accessory residential uses. The Park offers natural gas, hydro, and municipal water services.

Figure 9: Kanaka Business Park Site Plan



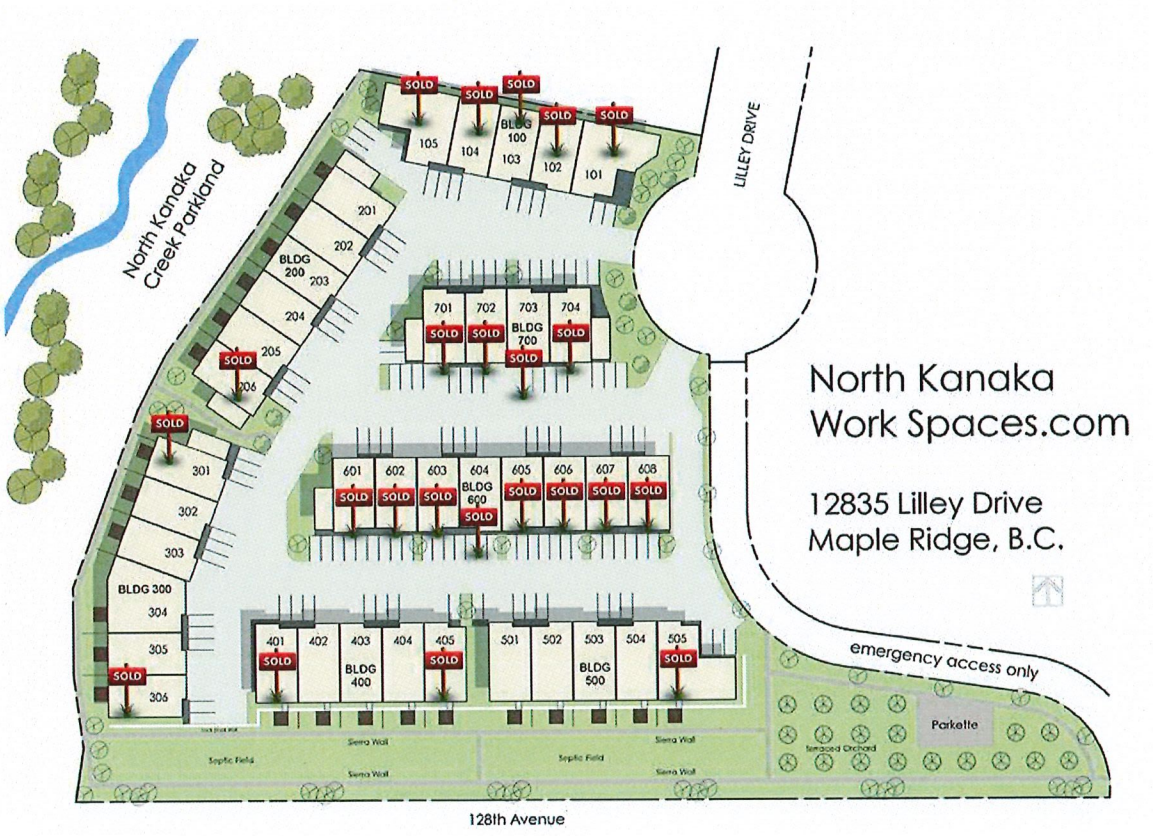
This project has taken many years to be sold and developed; some lots remain available. As with other industrial lands across the region, prices at this part have increased in recent years:

- When released over 10 years ago, parcels were selling for approximately $425,000 per acre
- By 2017, parcels were selling at $657,000 per acre
- Transactions recorded in 2018 showed a price point of $1.04 million per acre.
- Transactions in 2021 include:
    - A 1.15-acre parcel sold for $1.74m per acre in April 2021.
    - A 1.0-acre parcel sold for $2.86m per acre in August 2021.

  Both of the 2021 sales were to companies that require significant outdoor storage space to operate their businesses.

A notable project that has emerged in Kanaka Business Park in recent years is North Kanaka Work Spaces (12835 Lilley Drive). It is a multi-use light industrial complex comprised of 7 blocks of units, with unit sizes ranging from 1,500 to 1,650 square feet. All are 30 feet wide with 14-foot ceiling height. At time of writing there were 4 units for sale and 11 units for lease. Recent sales have exceeded $700 per square foot.

Figure 10: North Kanaka Work Spaces



Broker / Developer Commentary

Brokers have indicated that, because Kanaka Business Park does not offer good proximity to regional transportation corridors, it is not attractive to businesses operating in the warehousing, logistics and distribution space. It is, however, increasingly attractive to many other user groups in light of growing pricing constraints and Kanaka's offering of a range of lot sizes, development readiness (level sites, zoned, serviced) and flexibility for different use configurations (e.g., building intensive vs. land intensive uses). Kanaka offers a range of lot sizes and configurations, and it is development-ready (leveled, graded, zoned, services at lot line).

5.2.2 WEBSTER'S CORNER BUSINESS PARK

Constructed in 2008 and located at the far north end of 256th Street, Webster's Corner is 37-unit strata-titled business park. Its relatively remote location has proven an asset for many businesses who have been attracted here through a combination of price point, ownership opportunity, security, flood protection (600 feet above sea level) and proximity to abundant natural amenities for pre- and post-work recreation. At present there are units available in the Park for purchase, lease, or lease with an option to purchase.

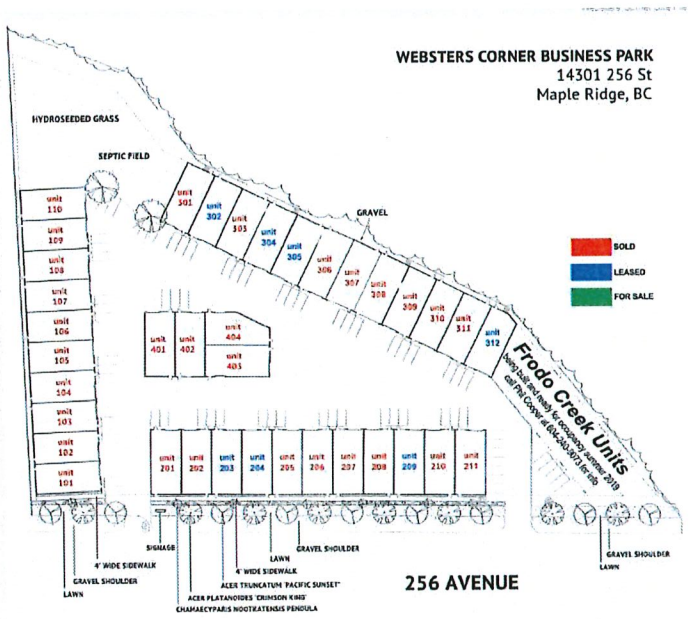
All units in the park are just under 1,700 square feet, with 28-foot width.

Users of the Park operate in the following sectors:

- Manufacturing (40%) – wood, machinery, concrete, composites, specialty equipment, food
- Professional / Technical / other services (30%) – automotive, machine repair, delivery, computer
- Construction (20%) – general contractors; specialty trades

In 2018, units in the park were selling for approximately $275 per square foot.

Figure 11: Webster's Corner Business Park Site Plan



Broker Commentary

This remains a homegrown example of innovation in small-scale light industrial, aimed at meeting the needs of a particular market niche in terms of price, location, and floor area. The opportunity for strata ownership, the complementary mix of trades and other businesses, the affordability, security, and proximity to nature, are all cited as reasons for businesses locating here. This project fills a niche requirement in the market, and there are no comparable projects at this price point.

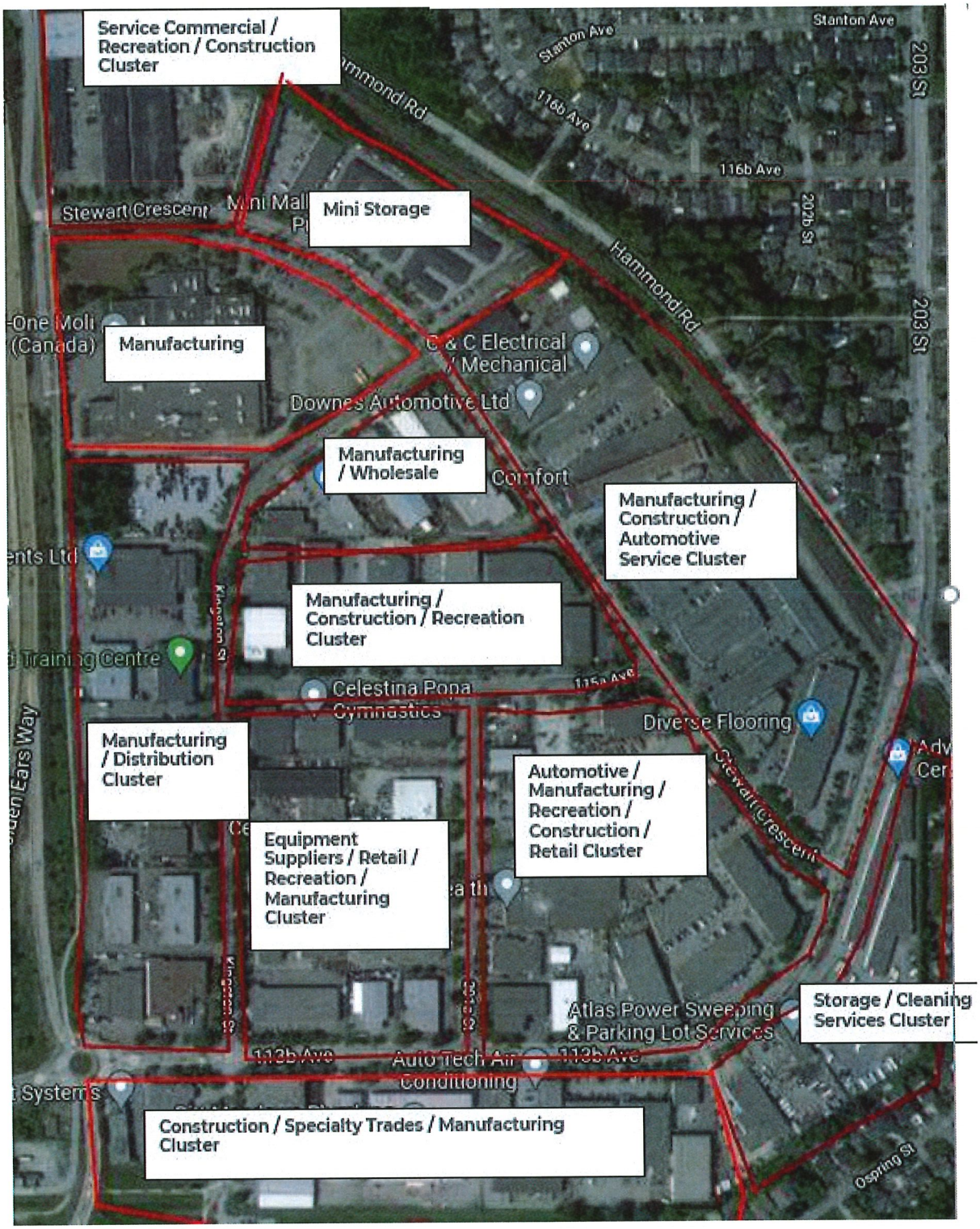
5.2.3 MAPLE MEADOWS BUSINESS PARK

The Maple Meadows Industrial park is an approximately 100-acre light industrial park at the far western edge of the City, near the Golden Ears Bridge, with easy access to the Lougheed Highway and Highway 1. The area is zoned M-3 (business park industrial), allowing for a wide range of uses including light industrial, indoor commercial recreation, distilleries / breweries, call centres, and a variety of other user typologies. Historically it has catered to tenants in commercial, manufacturing, warehousing, wholesale, distribution, retail, and automotive repair. Permitted densities are 0.75 FSR.

The park today is home to a wide variety of mostly building-intensive users across a wide range of sectors. While there remain some modest infill and redevelopment opportunities (e.g., truck storage / repair use could intensify), the park is largely built out. There is likely minimal overlap between users who would consider this location and a future area in Thornhill.

Figure 12 provides a snapshot of user sectors currently occupying the park.

Figure 12: Maple Meadows Business Park Category Clusters



5.2.4 ALBION INDUSTIRAL AREA

The Albion Industrial Area (south of Lougheed Highway) contains approximately 160 acres of industrial lands. The *Commercial and Industrial Strategy* identified 90 acres of developable industrial lands in this area, but also noted that the area is severely constrained from an infill and / or redevelopment perspective due to considerations of floodplain, infrastructure, and landowner expectations. Significant investments will be required for flood mitigation and infrastructure improvements. There remains opportunity here for certain user groups that require water access or proximity.

Most of the current user groups in this area would not be suitable for location in Thornhill due to their water and highway proximity requirements. Similarly, new or expanding companies that would seek opportunities in an area like Albion would, for the most part, be unlikely to consider areas like Thornhill.

5.3 FUTURE INDUSTRIAL SUPPLY POTENTIAL

None of the projects or areas discussed here are actively under development. Some may receive planning approval to proceed in the next 2+ years, but none could reasonably be expected to come to market until 2025 at the earliest.

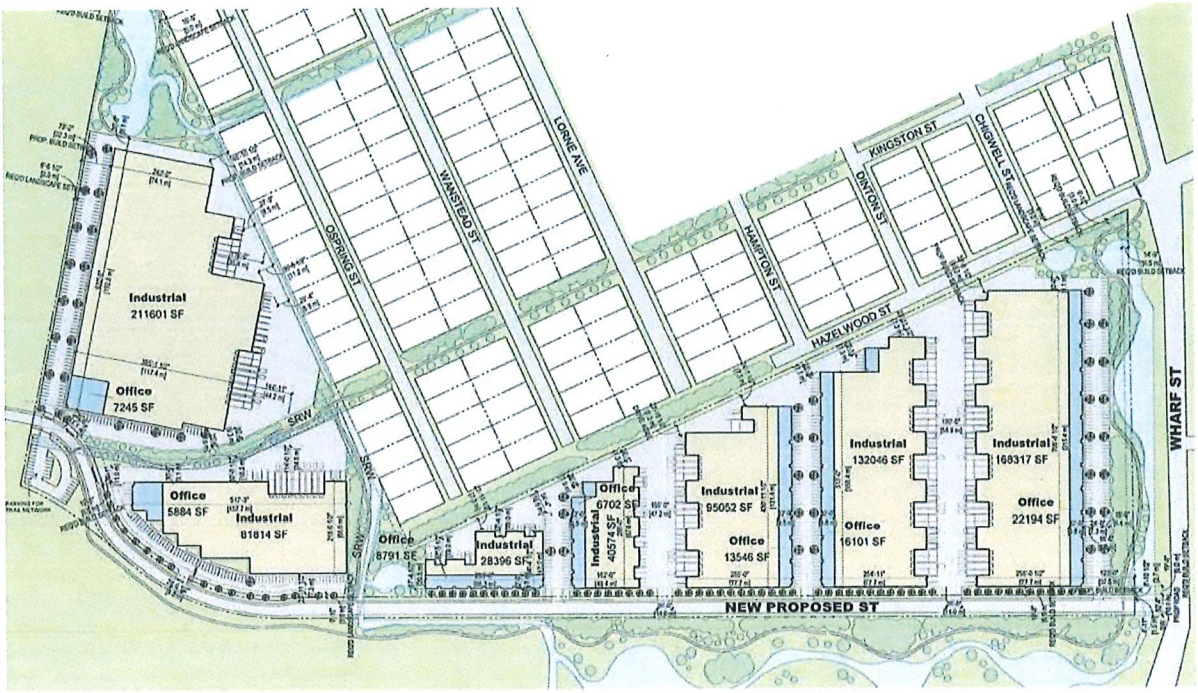
5.3.1 HAMMOND BUSINESS PARK

Located immediately south of Maple Meadows, the "Hammond Business Park" is a future concept for a 7-building industrial and office project with contiguity to the City's most prominent industrial cluster, and proximity to the Golden Ears Bridge. The project, being pursued by Cedar Coast, encompasses approximately 41 acres and would likely be home to between 650,000 and 900,000 square feet of built floor space. At time of writing this project has gone to Council for first reading.

This park, which would be part of an extended Maple Meadows 'cluster', is the most prominent and attractive industrial area in Maple Ridge. It will appeal to the user typologies that are and will be seeking space at Pitt Meadows' Golden Ears Business Park, including tenants looking for larger built-to-suit spaces. The site offers convenient access to the Trans-Canada, Lougheed and South Fraser Perimeter Road. There is potential here for configurations similar to that of Golden Ears (e.g., units from 4,000 square feet to over 200,000 square feet).

While there may be overlap in terms of industry sectors that would locate here and in Thornhill, there is likely little (if any) overlap amongst specific end-users within those sectors.

Figure 13: Future Hammond Business Park Concept



5.3.2 HAMMOND MILL REDEVELOPMENT

In 2021, Conwest Properties purchased the riverfront Hammond Mill site from Interfor for approximately $40 million, or just over $1.3 million per acre. This site, measuring 27 acres (11 hectares) offers a flat, industrially zoned parcel with proximity to major highways, and access to the Fraser River. While the specific concept for the site is still in the early stages of development, it will likely have similarities to the Hammond Business Park in terms of lot coverage and configuration.

Similar to the Hammond Business Park, we would not anticipate significant overlap between users seeking space at this site and those who may come to Thornhill.

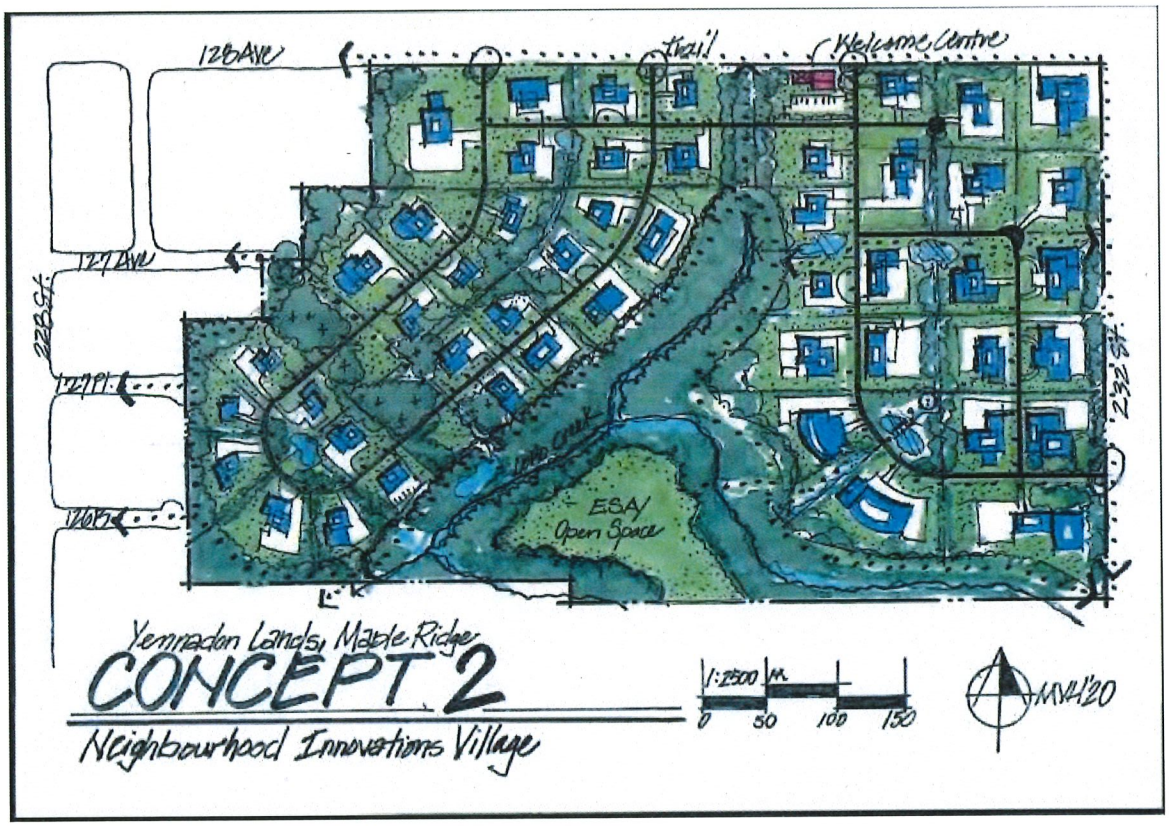
Figure 14: Hammond Mill Site

5.3.3 YENNADON LANDS

The Yennadon Lands are a cluster of 13 properties totalling 63 acres (25.4 ha) in the north-central part of Maple Ridge at 128th Avenue and 232nd Street. An industrial-use Concept Plan for the site was developed and endorsed by council in late 2020. Council granted First Reading to the amending bylaws on May 11th, 2021. A portion at the north end of the site is encumbered by ALR.

If the concept (or a modified industrial concept) is accepted and relevant OCP amending bylaws and other amendments (ALR and RGS) are passed, this project could be a compelling alternative to locations in Pitt Meadows for some users, given relative ease of access to the Golden Ears Bridge.

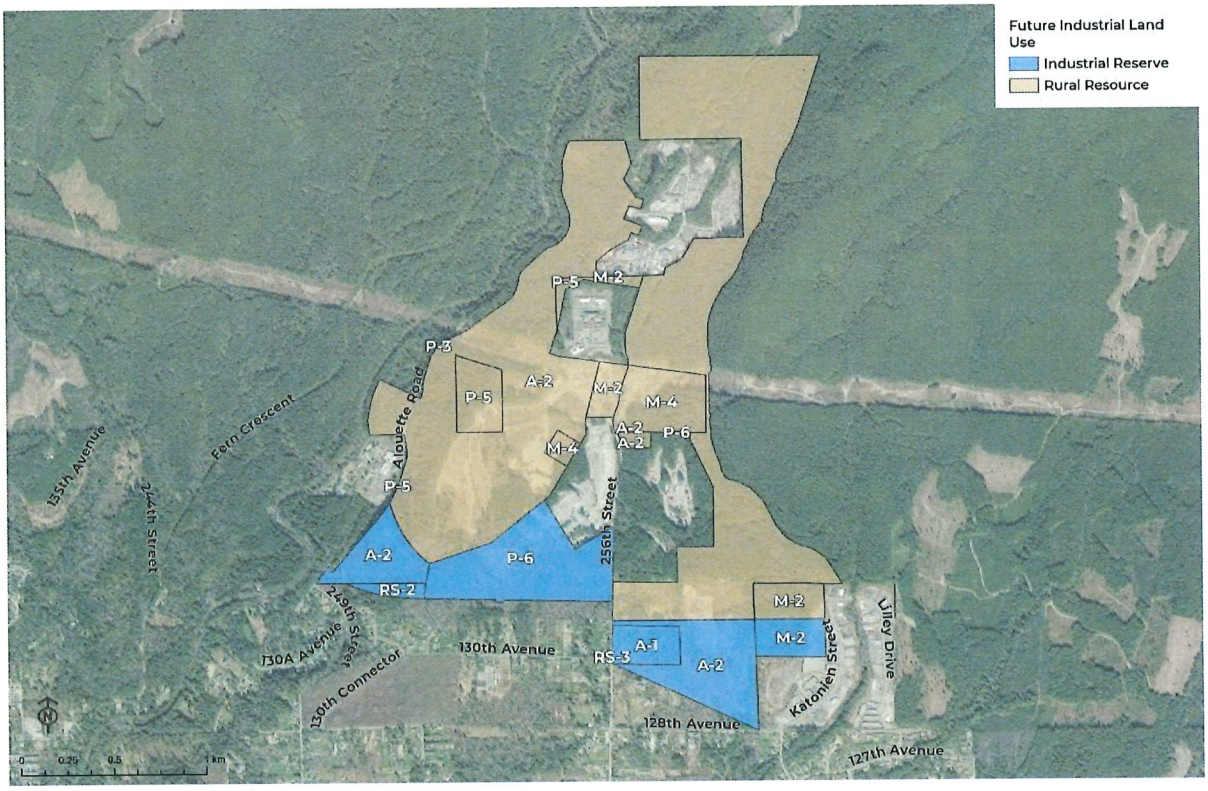
Figure 15: Yennadon Lands Preferred Concept



5.3.4 INDUSTRIAL RESERVE AND RURAL RESOURCE LANDS

The Industrial Reserve and Rural Resource lands are together arguably the most relevant future industrial supply to consider in the context of opening Thornhill for industrial use. The Industrial Reserve is comprised of lands on either side of 256th Street, west and northwest of the Kanaka Business Park. The Rural Resource lands are also located on either side of 256th and north of the Industrial Reserve. Much of that land is under active resource extraction use.

Figure 16: Industrial Reserve and Rural Resource Lands, with Zoning Classifications



Together, the Industrial Reserve and Rural Resource lands encompass nearly 950 acres. Of that, 93 acres is already zoned for industrial use.

The Industrial Reserve comprises 223 gross acres of land. While only 8.5% of this is currently zoned for industrial (19 acres), rezoning of the balance to industrial in the future would be consistent with long-term planning direction as presented in the OCP. Further, OCP Policy 6-62 encourages creation of a new zone to apply to these Reserve lands when they are opened for development, to permit "general mixed employment uses, [accommodating] a mix of light industrial, institutional and heavy industrial zones."[11]

Beyond the Industrial Reserve, the Rural Resource lands have opportunities for re-use and intensification over time for a variety of industrial users.

[11] Maple Ridge Official Community Plan Bylaw No. 7060-2014. Chapter 6, page 28.

Table 9 below outlines the total land areas in both the Industrial Reserve and Rural Resource areas depicted above, broken out by current zoning.

Table 9: Industrial Reserve and Rural Resource Lands by Zone

Existing Zoning	Industrial Reserve	Rural Resource	Grand Total (ac)
Agricultural	**112**	**621**	**732**
A-1	19		19
A-2	93	621	714
Industrial	**19**	**73**	**93**
M-2	19	29	48
M-4		44	44
Institutional	**86**	**30**	**115**
P-3		0	0
P-5		30	30
P-6	86	0	86
Residential	**6**		**6**
RS-2	6		6
RS-3	0		0
Grand Total (ac)	**223**	**724**	**946**

Before the Industrial Reserve is opened for industrial development, the OCP outlines the following preconditions that must be met:

1. Extension of Abernethy Way to 256th Street area, from its current terminus east of 232nd Street
2. Servicing analysis must be completed
3. Gravel supply assessment must be completed
4. "Sufficient utilization" should be reached of lands designated Rural Resource, Industrial and Institutional in the 256th Street Industrial area.

If the Abernethy Way extension were completed, this would provide current and future users of industrial lands in the 256th Street area a much more direct route for accessing the Golden Ears Bridge and Highway 1. It would also tie together multiple industrial areas within Maple Ridge, if the Yennadon Lands proceed with an industrial / business park land use.

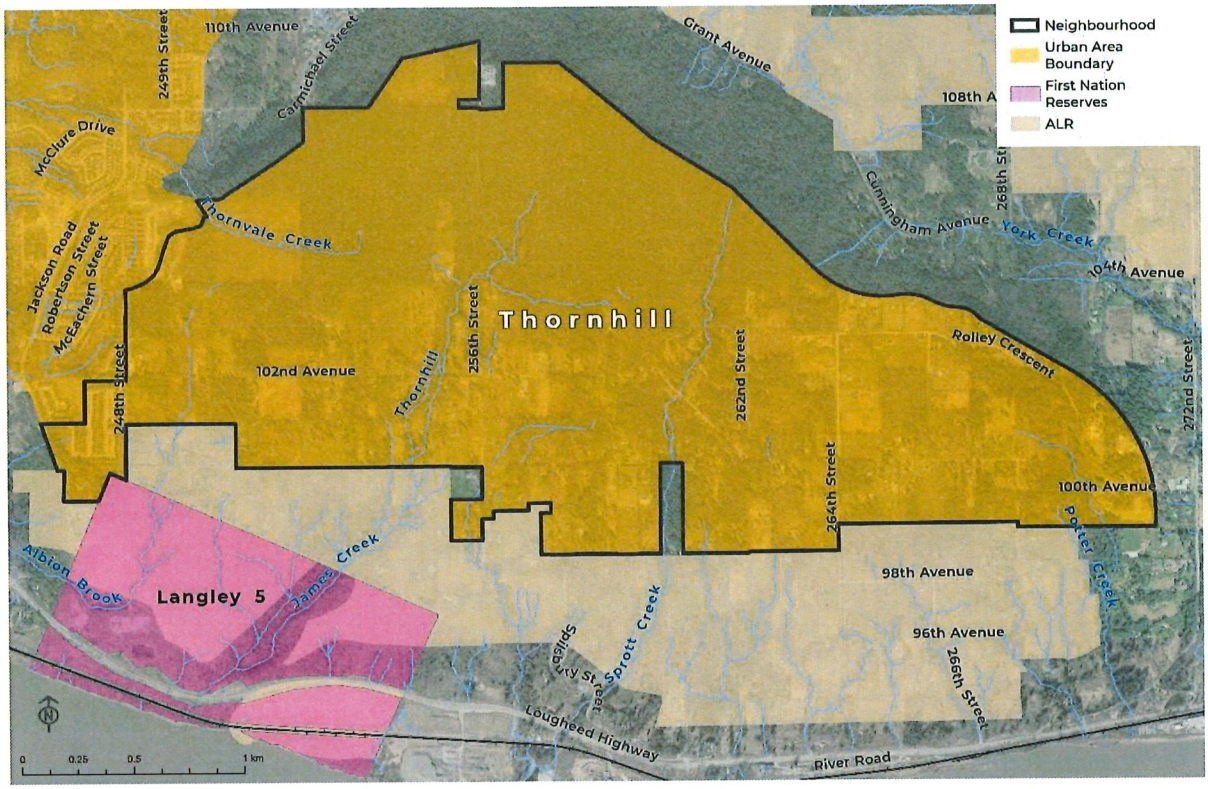
From a target market standpoint, the Industrial Reserve lands (and the Rural Resource Lands) with access via Abernethy Way would likely be a viable area for many types of users. It is likely that this area would attract many of the same user groups that would otherwise look to Thornhill. Given the possible scale of the industrial reserve lands, it is questionable whether both that area and Thornhill could move forward simultaneously. As with Thornhill, further analysis of the Industrial Reserve lands would be required to identify developable areas and costs to bring that area to market. Both areas will require significant infrastructure investments.

5.3.5 KWANTLEN "LANGLEY 5" RESERVE

The Kwantlen First Nation is in the process of exploring land use concepts and servicing for its "Langley 5" Reserve, located just south of Thornhill (see Figure 17 below). Early servicing concepts for the Reserve include an envisioned industrial land use north of the Lougheed Highway on the west side of the Reserve, which would be accessed by a new road from the Lougheed. That road could then take one of 3 possible routes through the Reserve to a connection with 100th Avenue in Thornhill.

While this is still in the early exploration stages, industrial lands at IR 5 could be a compelling offering for many users given visibility from and immediate access to the Lougheed Highway. This area could become part of a broader employment hub if Thornhill were to proceed but may also slow the pace of absorption in Thornhill.

Figure 17: Thornhill and Kwantlen IR 5



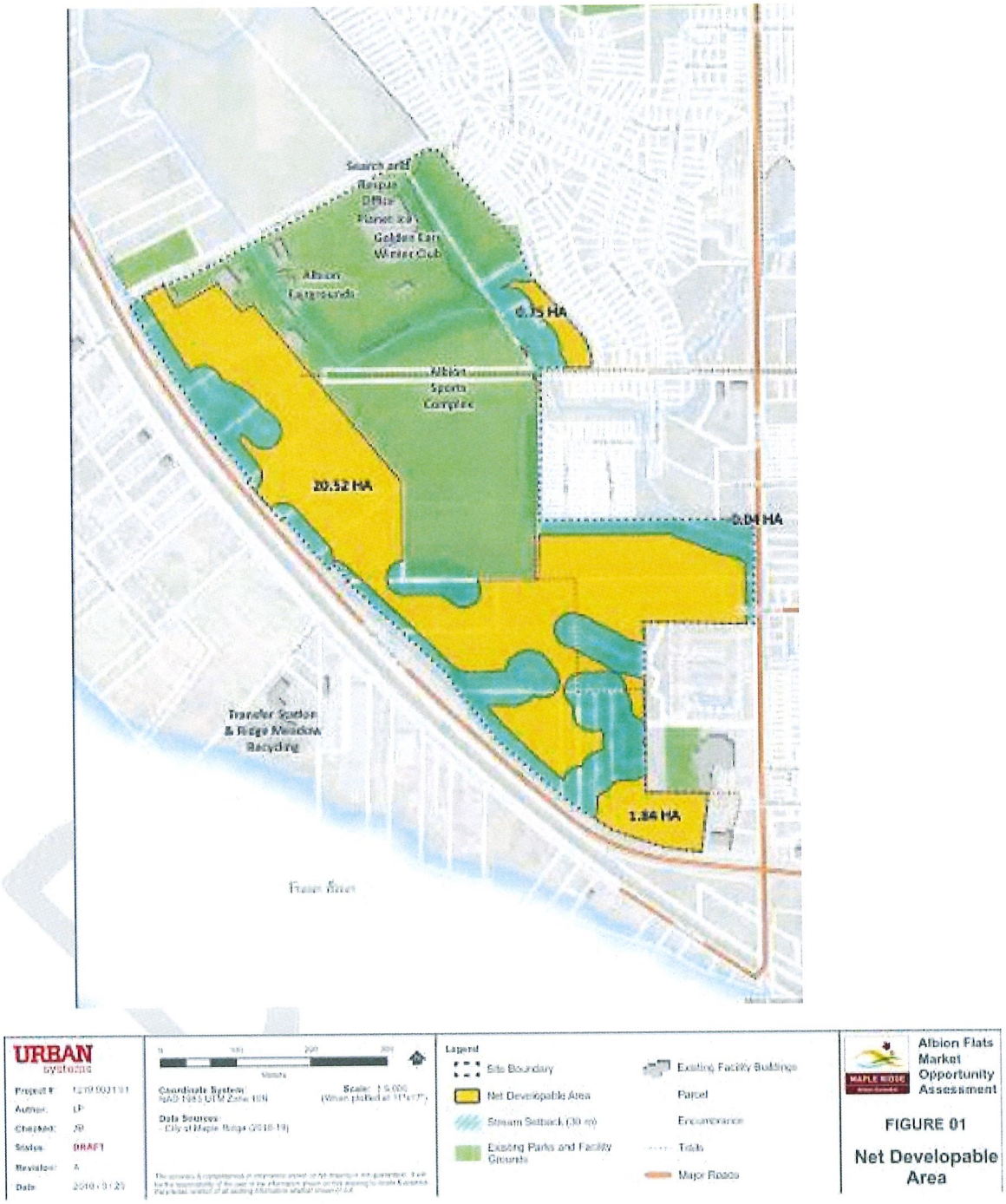
5.3.6 ALBION FLATS

Maple Ridge has explored a potential industrial / business / commercial use for a portion of the Albion Flats for many years. In 2019, at the direction of Council, staff were asked to advance updated planning work for the Flats' southern half, with an eye toward a mix of uses including recreational, commercial, and light industrial. To support this effort, a market opportunity assessment and strategy was commissioned, which pointed to two possible ways forward:

- A 35+ acre light / medium industrial business park, with an eye to bringing it to market within 8-10 years
- A mixed-employment and retail commercial node.

Development on the Flats' southern half will require an ALR exclusion.

Figure 18: Net Developable Areas on South Portion of Albion Flats



6.0 SUPPLY AND DEMAND SYNOPSIS AND IMPLICATIONS

The industrial land supply in Maple Ridge today is constrained. There are still a few parcels available in Kanaka Business Park, and opportunities for re-use and intensification in areas like Maple Meadows and Albion. There is also the pending redevelopment of Hammond Mill, which will, at completion, likely have a greater density of jobs across a variety of industry sectors. Low vacancy and rapid price escalation are indicators of a constrained and under-supplied market with growing latent demand.

There are multiple sources of possible future industrial land supply in Maple Ridge, with varying timelines to bring online, and varying likelihoods of proceeding:

- **Hammond Business Park:** The 41-acre Hammond Business Park (south of Maple Meadows), with potential for up to 900,000 square feet of built industrial space, will be attractive to the types of users that would look to places like the Golden Ears Business Park in Pitt Meadows. It has reached 1st reading. If drainage and environmental constraints can be overcome, this project will proceed.
- **Yennadon Lands:** If the Yennadon Lands proceed, this will bring to market 63 gross acres that will appeal to a variety of industries, also including users that value a direct link to the Golden Ears Bridge. There are various approvals still required for this project to proceed, including that of the Agricultural Land Commission (ALC) for removal of a portion of the lands from the ALR.
- **Industrial Reserve:** If Abernethy Way is extended east, the 223 acres of Industrial Reserve Lands could be opened, building on existing industrial clusters along 256th Street north of 128th Avenue. That new access route could make the Reserve lands a compelling choice for users in many sectors who are seeking a balance between access, amenity, and price point. Indeed, many users who would not consider the 256th Street area as a viable option today would look at the area more favourably with that access route completed.
- There is also future potential for new sectors and additional jobs to be accommodated by the **Hammond Mill** redevelopment. While future industrial uses may proceed at the **Albion Flats** at some point, some significant conditions must be met before the ALC will consider an exclusion.

Employment projections presented above indicate a range of future industrial land need scenarios for Maple Ridge. At the high end, demand over 30 years is projected at 229 acres, while the reference scenario projects demand of 171 acres. Within that overall demand picture, the industry sectors most likely to seek spaces in Thornhill (or a location with comparable attributes) account for up to 142 acres of growth in the highest scenario (62% of total) and 100 acres in the reference scenario (58% of total).

Beyond the projections above, there is latent demand for space from businesses in Maple Ridge that want to expand, and businesses that would relocate to Maple Ridge if appropriate lands were available.

Figure 19: Forecast Scenarios – 30 Year Industrial Land Demand (ac), Maple Ridge

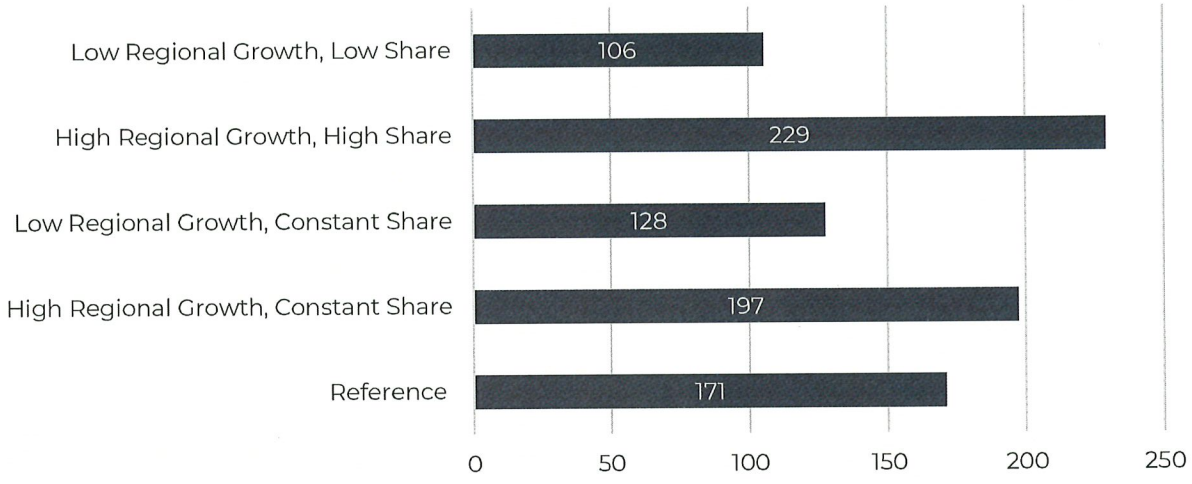
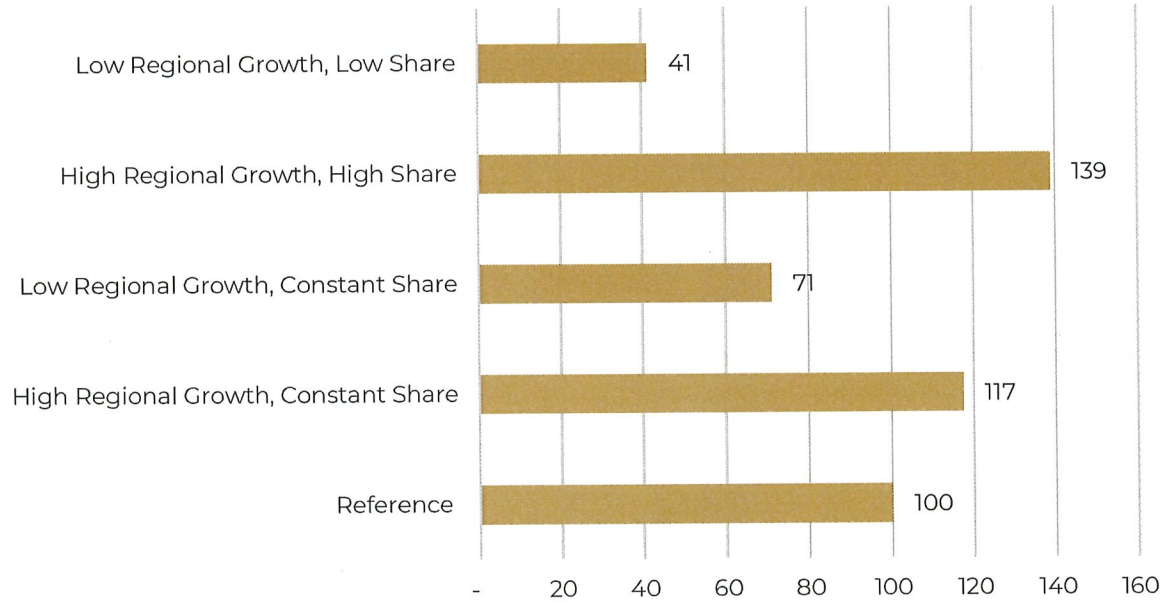


Figure 20: Forecast Scenarios – 30 Year Industrial Land Demand (ac) for Target Sectors, Maple Ridge[12]



Amongst brokers and developers interviewed for this project, there was broad consensus on the following points:

[12] Target markets for Thornhill are primary resource sectors; construction; manufacturing; Business Commercial Services; Other Services; Professional and Technical Services.

- There is latent demand for new industrial lands in Maple Ridge, and areas like Thornhill would appeal to a different client base than areas like Maple Meadows / Hammond Business Park, Hammond Mill and Yennadon.
- There will be future demand for multiple industrial land types in Maple Ridge.
- **If Thornhill were opened in a way that provides easy access to Lougheed Highway, a multi-phase project of up to 100 acres could be market supportable. Absorption could take 20-40 years, depending on the scale and the extent of other competition.**
- An industrial project in Thornhill would need to offer a wide range of lot sizes, from 0.5 acres to 10+ acres, with opportunity to assemble lots for larger users.
- **Target markets for Thornhill would substantially overlap with markets for a newly opened Industrial Reserve accessed via Abernethy Way connector. Both areas would be appealing to certain groups of end-users.**

All the above points to a market opportunity for an industrial project in Thornhill targeting particular industry sectors and end-users: those requiring slightly lower price points, those who do not necessarily need immediate Highway 1 access, and those looking for more outdoor spaces. However, that opportunity must be considered in the context of a potential market opportunity in the Industrial Reserve, serving much the same market. In both cases, major infrastructure investments will be required. In the case of Thornhill, that investment will also require close joint planning efforts with the Kwantlen First Nation.

Potential Future Scenarios:

1. If the Abernethy Way extension is 'green-lit' and the Industrial Reserve is opened, then this reduces the market opportunity at Thornhill. With over 200 acres potentially developable in the Reserve, this offers opportunity for a multi-phase project of substantial scale. In this scenario, it may still be prudent to designate a new "Industrial Reserve" area in Thornhill, to be revisited at such time as the current Industrial Reserve lands are within 10-years of build-out.
2. If Abernethy Way extension is deemed unviable for economic, environmental, political, or other reasons, this effectively eliminates any future industrial development in the Industrial Reserve. Under those circumstances, there is a clear market opportunity at Thornhill, provided that joint efforts with Kwantlen First Nation to provide new access from the Lougheed can proceed. Further, there could be opportunity to build a new industrial cluster in that area if Kwantlen proceeds with an industrial project on reserve lands.
3. If Kwantlen proceeds with an industrial development on IR 5 well in advance of any Abernethy Way extension progress, then there would be a market opportunity for Thornhill to proceed at that stage (depending on costs to bring serviced, accessible flat sites in Thornhill to market).
4. If Abernethy Way extension and Kwantlen IR 5 industrial (with associated new road) proceed simultaneously (or with some degree of overlap), then this comes down to a question of costs and revenue potential. As both the Industrial Reserve (with new access) and Thornhill (with new access) are options for serving a gap in the market, and both provide opportunity for multiple phases well into the future, the 'ranking of opportunity' needs to consider the question of relative financial viability. This can only be assessed following subsequent background studies that will shed light on costs to service and develop these areas.

7.0 OPTIMAL DEVELOPMENT AREAS ASSESSMENT

The demand assessment provided above has identified a potential opportunity for up to 100 acres of industrial / employment lands in Thornhill, built in multiple phases. If land constraints elsewhere in the region become even more acute than currently anticipated, this may increase the pace of absorption at this location. If, however, the Industrial Reserve lands are opened for development, Thornhill industrial development may not be required.

In this section we look at the Thornhill area through a geospatial lens to identify preferred locations for an industrial / employment area. In doing so, we have considered the following factors:

- Topography
- Water course setbacks and environmentally sensitive areas
- Future servicing and access
- Parcel distribution and ownership

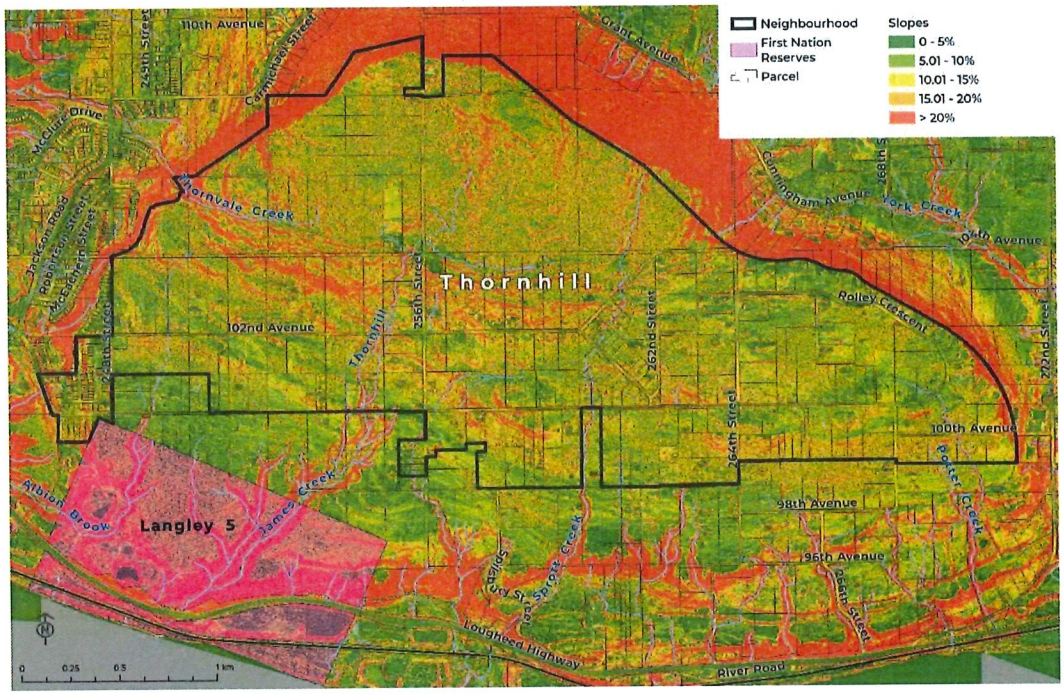
7.1 FACTORS

7.1.1 SLOPE

Industrial developments require flat, accessible sites. The greater the existing slopes, the more earthworks and grading will be required to create a viable industrial project.

Figure 22 below shows existing topography in and around Thornhill.

Figure 21: Slope Assessment, Thornhill, and Surrounding Areas



While there are pockets of relatively flat land (<5% slope) around Thornhill, mostly in the eastern areas but also in the southwest, much of the land has a grade of at least 5-10%. There are also much steeper areas of 15+%, often related to existing water courses such as Thornvale Creek.

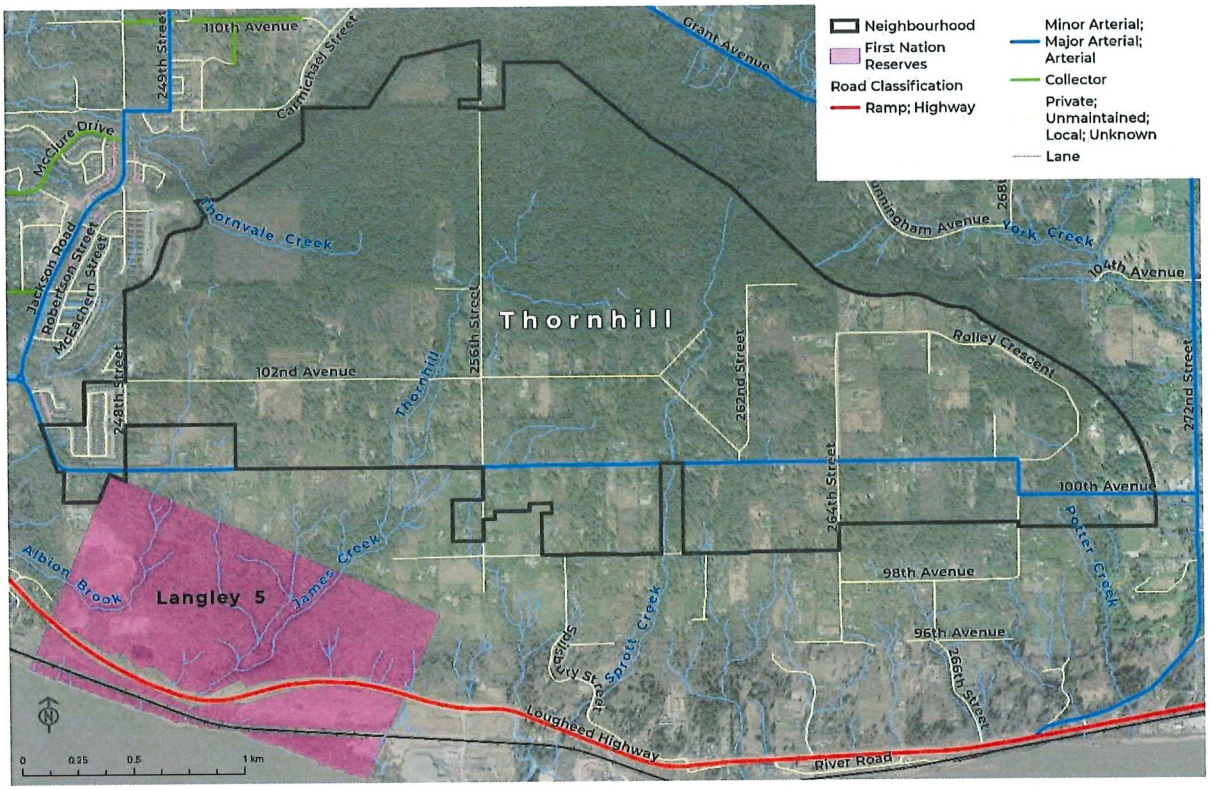
Environmentally sensitive areas and setbacks are 'netted out' of any land potential for future industrial use.

7.1.2 ACCESS

Thornhill is currently served by a single arterial road (100th Avenue) and a small number of local roads. This road network is insufficient to support a future industrial use.

A precondition for industrial development would be a new access point into Thornhill from the Lougheed Highway. Given the topography between Thornhill and the Lougheed (as shown in Figure 22 above), a new route connecting Thornhill to the Lougheed would likely have to pass through Kwantlen's IR 5 Reserve and connect with 100th Avenue somewhere on the western side of Thornhill.

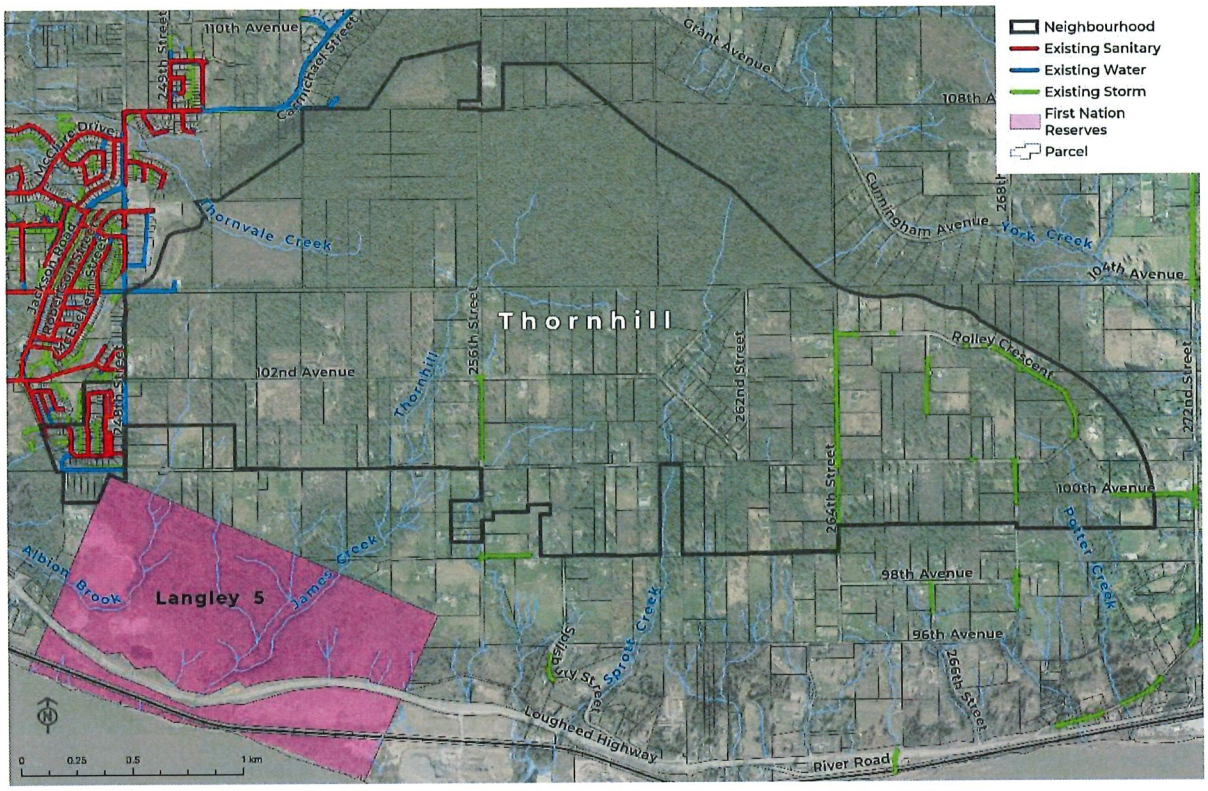
Figure 22: Thornhill Road Classifications



7.1.3 SERVICING

Water service would need to be extended into Thornhill for any industrial use. Figure 24 below shows the placement of existing services. There is a small water line on the western edge of Thornhill north of the 104th Avenue alignment. In addition to service extensions, the system would need to be modelled for pressure and flow requirements. This may increase the scope of work to include upstream infrastructure upgrades.

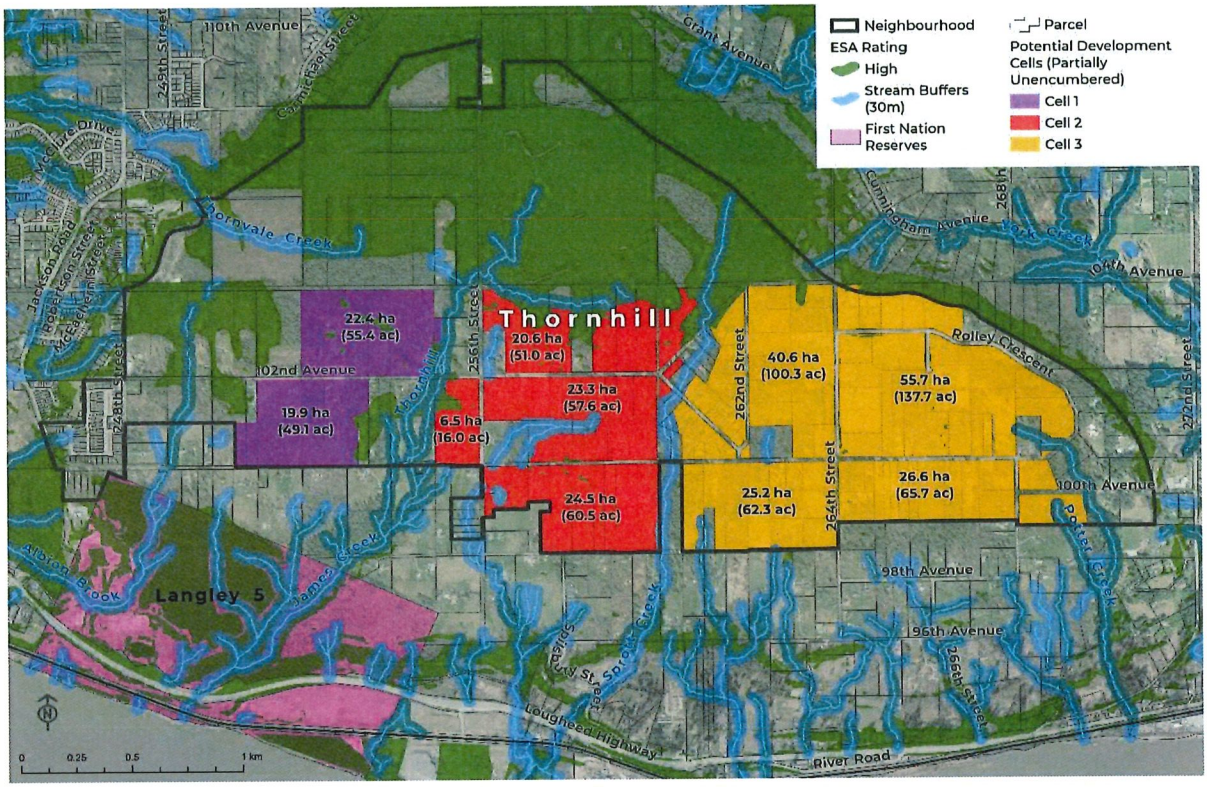
Figure 23: Existing Servicing (Water, Sanitary, Storm)



7.2 POTENTIAL DEVELOPMENT AREAS

After netting out areas with a "high" environmental sensitivity rating, 30-metre stream setbacks, and parcels that would not allow for reasonable access or contiguity, we have identified three development 'cells' within Thornhill where an employment area could emerge. These are depicted in Figure 25 below.

Figure 24: Potential Development Cells for Employment Lands



- **Development Cell 1 - West**
  - Just over 104 acres (42.3 ha) of land in total, with about 53% north of 102nd Avenue and the balance south of 102nd.
  - Size is consistent with broker opinion on reasonable size for employment land node in this area.
  - Likely the development cell closest to where a future road alignment from Lougheed into Thornhill would run.
  - Areas north of 102nd Avenue would be more challenging to develop from a slope standpoint; costs of grading are unknown at this stage.
  - There are considerable areas south of 102nd Avenue with low or modest slope (<10%)
- **Development Cell 2 – Central**
  - Just over 185 acres (74.9 ha) of land in central Thornhill, stretching from the 104th Avenue alignment in the north to 98th Avenue in the south, mostly between 256th Street and Sprott Creek. Sizes of individual sub-areas shown in Figure above.
  - Offers potential for multiple phase project moving west to east, or south to north.
  - Areas north of 102nd Avenue have substantial slopes which will make them difficult to develop.
  - Some areas south of 100th Avenue also have 20%+ slopes.

- **Development Cell 3 – West**
    - The largest development cell at 366 acres (148.2 ha), again with sizes of individual sub-areas shown in the Figure above.
    - Runs from east side of Sprott Creek on the west, south to the southern boundary of Thornhill, east to Rolley Crescent, and north to 104th Avenue alignment.
    - Offers many large, contiguous parcels
    - Areas east of 264th street and north of 100th Avenue have fewer extreme slope challenges than other development cells
    - Will be farthest from a future road connection to Lougheed Highway and will be challenging from a water service standpoint.

Development cell 1 would likely present the most viable option, in light of both the likely future routing for a new road into Thornhill and the likelihood of servicing extensions from the west or south. The amount of land in this area is sufficient to satisfy a multi-phase project with a 20–40-year absorption period and the area is not substantively more topographically constrained than other areas. Pro forma financial analysis would need to be conducted following additional due diligence to determine whether this project is economically feasible.

Development cells 2 and 3 may be viable for long-term future industrial uses, but the timelines for those uses are beyond the projection horizon for this project. Further, the need for those areas will vary depending on the future of the Industrial Reserve and Rural Resource Lands, plus some of the other potential future industrial supply noted previously (e.g., Kwantlen IR 5, Albion Flats).

8.0 CONCLUSIONS: THORNHILL EMPLOYMENT LANDS OPPORTUNITY

There is a market opportunity for an industrial / employment lands node to emerge in Thornhill. The opportunity – at least within the timeframe covered by this analysis – would be for an industrial / business park of up to 100 acres (+/-), with a likely absorption period of 20-40 years. The Park would immediately fulfill a clear and growing latent demand in the local market (as indicated by low vacancy and rapid price growth) and thereafter would serve the projected growing land needs amongst a sub-set of industry sectors, most notably manufacturing, construction, primary resource-related industries, and business commercial services. Beyond the 30-year (+/-) time horizon, there may well be opportunity for additional industrial lands in Thornhill (beyond 100 acres). However, the extent of that opportunity beyond the 30-year horizon will be dependent on the nature of the competitive landscape, locally and regionally, at that time.

There are multiple areas within Thornhill where an industrial land use could emerge. The most logical area of focus is "Development Cell 1" (Figure 24), comprising just over 100 acres west of 256th Street. This area has the closest proximity to Kwantlen IR 5, through which a future access road between Thornhill and the Lougheed Highway would likely need to run. There could also be a future synergy between a Thornhill industrial park and an industrial land use on the Kwantlen IR, although development of the latter could slow absorption of the former.

The industrial market opportunity in Thornhill cannot be considered in isolation, as what happens elsewhere will shape the extent of opportunity at Thornhill. In particular, while there is a clear market opportunity today and in the future in this area, the City must consider whether opening Thornhill for industrial use is preferable to opening the Industrial Reserve lands for development through extension of Abernethy Way to 256th Street. Both Thornhill and the Industrial Reserve lands will require substantial infrastructure investments to be made viable (the costs of which are unknown), with the former requiring new access from the Lougheed Highway, and the latter requiring extension of Abernethy Way. Both areas would serve a notable, growing, and substantially overlapping industrial market gap.

If the Industrial Reserve lands are opened, this does not necessarily mean that there is no industrial future for Thornhill. Rather, the timing for such use would be pushed well into the future. As such, the City may consider applying an "Industrial Reserve" designation in Thornhill (at least for Development Cell #1, and possibly all or portions of other Development Cells). The timing for opening those areas to industrial development would be driven by both the pace of absorption in the Industrial Reserve, and the possible timing (and costs) of creating a new access point to the Lougheed Highway.

Further background study to assess other aspects of Thornhill's viability as an industrial area (environmental, geotechnical etc.) will be needed to fully assess the opportunity. These studies would provide inputs for a pro forma financial viability assessment. At that point, the costs to bring Thornhill 'online' can be weighed against the costs to bring the Industrial Reserve lands to market, allowing Council to make an informed decision on infrastructure dollar allocation.

Following is a summary of the market opportunity for an industrial area at Thornhill:

OVERALL SIZE OF PROJECT

- Up to 100 acres, phased, with 20–40-year absorption projection.
- Development Cell #1 (Figure 24 above) would be the focus for this.

- Possible long-term opportunity (beyond forecast horizon) in other Development Cells, but timing would be many decades in the future, and need would be dependent on what transpires in the local and regional industrial landscape.

COMPETITION

Primary Competitive Areas

- Industrial Reserve Lands (256th) (if opened)
- Kwantlen IR 5 industrial area (may slow Thornhill absorption, but also may appeal to slightly different users)
- Albion Flats

Secondary Competitive Areas

- Industrial areas in Mission
- Dominion Triangle (Port Coquitlam)*
- Port Kells (Surrey)*

*These areas are supply constrained and will be more expensive than Thornhill. Both of those areas are more likely to be sources of demand for Thornhill, from businesses looking for expansion options in lower-cost locations.

SUCCESS FACTORS

- Joint planning with Kwantlen First Nation for access and servicing
- New access route to Lougheed Highway (likely through Kwantlen IR 5)
- Flexibility for multiple user groups (land vs. building intensive)
- Range of lot sizes, including sub-1 acre lots
- Financial viability

TIMING

- Medium-to-Long-term.
- Could see absorption of +/- 5 acres per year.

OPTIMAL LOCATION

- Southwest portion of Thornhill (development cell #1)

TARGET SECTORS

- Manufacturing
- Construction and related construction services
- Primary Resource sectors
- Business and other services
- Professional services

KEY CONSIDERATIONS

- Timing of extension of Abernethy Way and opening of Industrial Reserve Lands
- Timing of Kwantlen IR 5 proceeding with industrial development and associated new road and servicing infrastructure; this timing could be dependent in part on joint planning efforts between Maple Ridge and Kwantlen.
- Relative costs / revenues of opening / developing Industrial Reserve vs. Thornhill.

POTENTIAL SCENARIOS & PATHS FORWARD

1. Abernethy Way green-lit, Industrial Reserve Opened: reduces market opportunity at Thornhill, or pushes it well into the future.
2. Abernethy Way Extension unviable: short-to-medium term market opportunity at Thornhill, subject to successful collaboration with Kwantlen for access, and viable development pro forma.
3. Kwantlen Industrial Project Proceeds, Abernethy Way Delayed: market opportunity could be captured at Thornhill, again subject to successful collaboration with Kwantlen and viable development pro forma. Opportunity emerges for a new employment cluster to emerge.
4. Kwantlen Industrial *and* Abernethy Way Proceed: relative financial viability and timing for bringing lots to market becomes main differentiating factor. Would warrant further market research to gauge target end-user sentiment. For this scenario to emerge there would presumably be servicing agreements required between Kwantlen and Maple Ridge.

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City of Maple Ridge

TO:	His Worship Mayor Michael Morden and Members of Council	**MEETING DATE:**	**December 14, 2021**
		FILE NO:	**01-0540-30-04**
FROM:	Chief Administrative Officer	**MEETING:**	Council Workshop

SUBJECT: Processes for Permitting Curb-side Patios on a Long-term Basis

EXECUTIVE SUMMARY:

In June 2020, Council directed staff to develop an expedited process to allow additional temporary (seasonal) outdoor seating on both public and private spaces to help offset the effects of COVID-19 Public Health Order restrictions on the hospitality industry.

There are approximately 30 seasonal outdoor patios operating in Maple Ridge, located on a mix of private and public spaces including the four on-street (curb-side) patios located on 224 Street in the Town Centre. The Liquor and Cannabis Regulation Branch (LCRB) recently announced that all existing *Temporary Expanded Service Area Authorizations* (TESA) for food primary, liquor primary, and manufacturer licensees (e.g. craft breweries) have been extended to June 1, 2022.

The Province has also announced a process that will allow businesses to apply to make their temporary expanded service areas permanent. Applicants must apply to the LCRB and are required to meet all local bylaws and requirements. The City of Maple Ridge is reviewing each TESA application made by a liquor-primary or manufacturer licensee individually prior to granting approval. Applications from food-primary establishments for a TESA located on private property do not require approval from local government. Building permits are still required for any structures (including tents) erected on private or public property.

The focus of this report is to build on and enhance previously established processes that allow patios located on public property (i.e. on-street or "curb-side" patios) to operate on a long-term, year-round basis in the Town Centre. This could include working with external stakeholders to develop common design standards to address life-safety and aesthetic concerns. The City has a well-established process for allowing sidewalk cafés that offer seasonal outdoor seating on public sidewalks and staff are not recommending any changes to that program.

Patios operating in Maple Ridge have been well received by the public, well managed by businesses, have not generated a significant number of complaints to the City, and are consistent with the Town Centre Vision Plan and Council's goal of creating a more active vibrant and welcoming Town Centre.

RECOMMENDATION:

That a permitting process to allow restaurants, cafés and craft breweries to operate curb-side (on-street) patios on a long-term basis be developed and implemented.

DISCUSSION:

a) Background Context:

The Economic Development Department has identified approximately 30 seasonal outdoor patios operating in Maple Ridge on a variety of public and private spaces, 11 of which have been created in the last 18 months. These outdoor patio spaces range from sidewalk cafés consisting of a single table and more formal bistros on private property, to structured patios built in private parking lots and "curb-side" patios built in on-street parking spots. The Economic Development Department also received initial inquiries from an additional 13 businesses that chose not to proceed with their applications, primarily due to operational or leasing constraints; no patio applications were denied by the City.

These outdoor dining spaces were generally well received by the public, well managed by businesses, and did not result in a significant number of complaints to the City. It should be noted though, that the Downtown Maple Ridge Business Improvement Area has recently expressed concern to the Economic Development Department about the loss of a parking spot on 224 Street.

Options

Staff have identified two options that could allow restaurants, cafés and craft breweries to permanently expand outdoor seating areas:

1. Sidewalk cafés that are located on public spaces and typically have minimal furniture and set-up requirements
2. Outdoor patios that can be located on either public or private property, and typically incorporate built elements such as decking, walls, planters and electrical lighting that require more time and cost for the applicant.

Sidewalk Cafés

The City has a well-established process for allowing sidewalk cafés to offer seasonal outdoor seating on public sidewalks. Businesses set-up and remove a small number of tables and chairs each day directly in front of their premises and do not include any permanent additions or structures. Staff are not recommending any changes to this program at this time.

Please see Appendices A and B for the City's current *Application for a Sidewalk Café* and *Regulations for Sidewalk Cafés.*

Outdoor Patios

The focus of this report is outdoor patios located on private and public property with a special emphasis on "curb-side" patios located in on-street parking spots.

I. Patios on Private Property

Staff have received inquiries from restaurant and craft brewery operators interested in putting temporary, seasonal patios or "picnic areas" on private property such as off-street parking spaces or other areas of private property. Most of these are considered "seasonal patios" and, as per the BC Building Code, should not impact the establishment's overall occupancy or trigger additional washroom requirements provided no construction is required.

In order to have this type of patio, the business will need to obtain consent from the property owner or strata if they are located in a multi-tenant situation. The applicant will need to demonstrate that there is sufficient parking remaining, and, in the case of a multi-tenant development, that there is support from the other businesses located in the development. The Fire Department recommends including a physical barrier (e.g. fencing or planters) around the patio if it is located in a parking area.

No formal approval from the City would be required for this type of patio as long as no structural elements (e.g. walls, floors or roofs) are being added. Building permits and inspections will be required if structural elements such as floors, roofs or walls are being added, and if there is installation of electrical appliances or fixtures. Individual restaurant owners are responsible for obtaining any necessary approvals from the Liquor and Cannabis Regulation Branch and for following all current Public Health Orders.

II. Patios on Public Space

Patios, in this section of the report, refers to dedicated outdoor patio areas located in public spaces, usually on sidewalks or in on-street parking spaces that are built and paid for by individual business for their exclusive use as an extension of an existing restaurant, café or craft brewery. Patios located in on-street parking spots are sometimes referred to a "curb-side" patios.

Although most curb-side patios are meant for seasonal use, they are usually substantial, structured spaces that include railings and gates, raised floors, lighting and planters. In these cases, the City requires Building Permits to regulate their construction and Highway Use Permits to regulate their occupancy of public space. They are required to be constructed in such a way as to ensure public safety and to have a minimal impact on City operations (e.g. snow clearing). There are currently four curb-side patios on 224 Street that were constructed with Building Permits and are regulated through Highway Use Permits.

Businesses in Maple Ridge report having spent between $5,000 and $10,000 in the construction of these types of patios. Businesses can apply for funding from the DMRBIA Façade Improvement Program, however, to be eligible for this funding, the improvements must be considered permanent. On-street patios are considered temporary and, therefore, are not eligible for funding from the Facade Improvement Program.

Recommendations for the design, siting and operation of all patios

Economic Development staff conducted a review of similar patio programs developed by other Lower Mainland municipalities including Chilliwack, White Rock, Vancouver and Richmond to identify common themes and best practices applicable to curb-side patios. Economic Development staff also consulted internally with Engineering, Bylaw & Licensing Services, Building, Operations and Fire, as well as with the Downtown Maple Ridge Business Improvement Area and the Chamber of Commerce Serving Maple Ridge and Pitt Meadows, to develop the following general conditions that would apply to all outdoor patios constructed and operated in Maple Ridge.

All Patios on Public or Private Property

- Must be designed, constructed and operated in a manner that ensures public safety
- Must meet all applicable BC Building, Plumbing and Fire Code regulations
- Building permits and inspections are required for any structures (roofs, walls, partitions), electric or gas appliances
- No permanent roof structures or coverings are permitted on curb-side patios or sidewalk Cafés. Retractable awnings attached to a structure require an Engineer's approval and a Building Permit. An approved system for venting combustion gases is

required, along with carbon monoxide detectors if heating or cooking elements are located under a covering.

- Any lighting elements, including installation, must meet electrical safety standards (CSA)
- No amplified music or speakers are permitted, and service must end at 10:00 pm with all patios cleared by 11:00 pm
- Smoking is not permitted within the patio area
- Patios must be operated in compliance with all applicable Liquor and Cannabis Branch regulations and Public Health Orders

Patios located Private Property

- Tents are considered structures under the BC Building Code and require an Engineer's letter to confirm the tent's anchorage and ability to resist wind forces and rain/snow loads. Tents must be Underwriters Laboratories of Canada (ULC) rated if heating or cooking elements are located under it and an approved system for venting combustion gases is required, along with carbon monoxide detectors. Tents must be removed on a daily basis.
- If located in a private off-street parking lot, the patio space must not displace an accessible parking spot for people with mobility limitations
- Must have permission of landlord or strata

On-street / Curb-side Patios

- Must be designed, constructed, located, operated and maintained on an ongoing basis in manner that ensures public safety (locations will be reviewed on a case-by-case basis)
- Regulated through Building Permits and Highway Use Permits
- Only permitted in the Town Centre as defined by DMRBIA Bylaw map
- Patios near intersections will be reviewed on a case-by-case basis
- The patio must not extend past the business frontage
- Maximum size equivalent to a single on-street parking spot
- Must be completely open on all sides to the elements and not interfere with traffic sightlines or impede the visibility for all road users
- The design of any new patios must incorporate a traffic barrier (e.g. large planter box) on the traffic facing side of the patio
- Must meet all applicable BC Building, Plumbing and Fire Code regulations
- Requires Building Permits and inspections
- Must not interfere with pedestrian access
- Must not interfere with access to, or the operation of, City infrastructure (sewers, power, sanitary, telecommunications, trees), or interfere with storm water drainage
- Must be constructed off-site and in a modular fashion and be removable in case of emergency
- Reflectors are required on the corners of the patio
- Must maintain $5 million in liability insurance and the City must be a named insured
- Must allow access to building frontages for the Fire Department (no more than two patios in a row, 48' linear feet maximum)
- Require a $500 security deposit to ensure sufficient funds are available if removal of the curb-side patio structure is required

b) **Desired Outcome:**

Restaurants, cafés and craft brewers are significant contributors to the local economy and play a crucial role in creating a dynamic, vibrant social environment for residents and visitors of Maple Ridge. Expediting the permitting process for outdoor patio spaces will help these businesses offset some of the seating capacity they have lost to comply with COVID-19 operating restrictions. Hopefully, the proposed changes will not only allow these businesses to meet the operating challenges they face, but will also provide new dining and entertainment options for residents and visitors to Maple Ridge.

c) **Strategic Alignment**

Creating a vibrant, animated Town Centre is an economic development priority for the City of Maple Ridge. Restaurants, cafés and craft brewers have all been identified as key elements in creating an attractive, socially active downtown destination for residents and visitors.

d) **Citizen/Customer Implications**

The creation of additional outdoor seating allows restaurants, cafés and craft breweries to operate at a higher capacity while maintaining social distancing requirements to ensure public safety. This, in turn, allows these establishments to hire more staff, provide more local dining and social opportunities for residents, and provides additional activity and animation in the community.

When the Chameleon Café's on-street patio was first opened, there was some initial concern from businesses and the community about the loss of parking on 224 Street. However, since it has been in operation, the Chameleon Café has received significant public support for their patio. The City will require applicants for these types of patios to demonstrate they have canvassed neighbouring businesses and have their support as a condition of approval.

Both the Downtown Maple Ridge Business Improvement Association and the Chamber of Commerce Serving Maple Ridge and Pitt Meadows were consulted during the development of this report.

e) **Interdepartmental and Policy Implications**

The City has well-established policies and regulations that govern the location and operation of sidewalk cafés and staff are not recommending any changes to these policies.

The Economic Development Department is working with the Engineering, Building, Bylaw & Licensing Services, Legal and Legislative Services, Operations, RCMP, Fire and Planning Departments on an ongoing basis to implement the processes proposed in this report. These discussions have included consideration of:

- Public safety and security
- Traffic and pedestrian traffic safety
- Impact on surrounding businesses (loss of parking, garbage, loitering)
- Liability and risk management
- Private use of public space (in the case of curb-side patios and sidewalk cafés)
- Impact on City Operations

Business Plan/Financial Implications

The hospitality industry is continuing to be negatively impacted by COVID-19 related restrictions. The Economic Development Department recommends the City continue to waive Building Permit and Highway Use Permit fees and security deposits for patios on public spaces for 2022. All patios will continue to require Building Permits for their construction and valid Highway Use Permits (including proof of insurance) to operate on public spaces.

The Economic Development Department is also recommending the development of a new annual $500 patio fee for curb-side patios to compensate for the loss of the on-street parking spot beginning in January 2023.

g) Alternative

Council could choose to continue with the current practices, regulations and timelines that govern sidewalk cafés, place a moratorium on new curb-side patios, and continue to allow existing curb-side patios to continue to operate as permanent legal non-conforming uses for the current operators.

CONCLUSION:

Restaurants, cafés and craft breweries are an important part of the economic and social fabric of Maple Ridge. They are significant employers, support other local business through their supply chains, and provide a valued opportunity for socializing with friends and families.

These businesses have been heavily impacted by the COVID-19 pandemic restrictions which have included closing or limiting capacities in indoor dining areas, enhanced hygiene and physical distancing requirements, ongoing staff shortages, and the recent implementation of "vaccine passports". Outdoor patios allow restaurants and craft brewers to provide a safe space for customers who may still be avoiding public indoor spaces due to perceived risk.

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Concurrence: **W. David F. Pollock, P.Eng**
General Manager, Engineering Services

Approved by: **Scott Hartman**
Chief Administrative Officer

Attachments:

(A) Application Process for a Sidewalk Café
(B) Regulations for Sidewalk Cafés
(C) Downtown Business Improvement Area Map

SCHEDULE A

Attachment (A) Application Process for a Sidewalk Cafe

APPLICATION PROCESS for SIDEWALK CAFÉ

1. Review regulations and ensure that you are able to comply.

2. Make application with the Inspection Service Department.

   The Engineering Department will provide a plan review and pre-inspection. However, the City of Maple Ridge is under no obligation to perform such inspections and these inspections in no way relieve the applicant from the obligation to comply with the regulations and the terms of the Sidewalk Café permit.

3. The plans will be distributed to various departments for acceptance. Upon plan acceptance, a Highway Use permit will be issued to construct the enclosure and or to use the City's sidewalk. An application fee and security deposit along with third party liability insurance will be required at this step.

4. If an enclosure is being constructed, a final inspection for use and occupancy is required.

5. Each anniversary date (expiration of insurance certificate) a renewal request for the Highway Use permit is required. A pre-inspection for conformity with the original agreement will be required prior to issuance of a new permit. It is the operator's responsibility to ensure that the permit is renewed.

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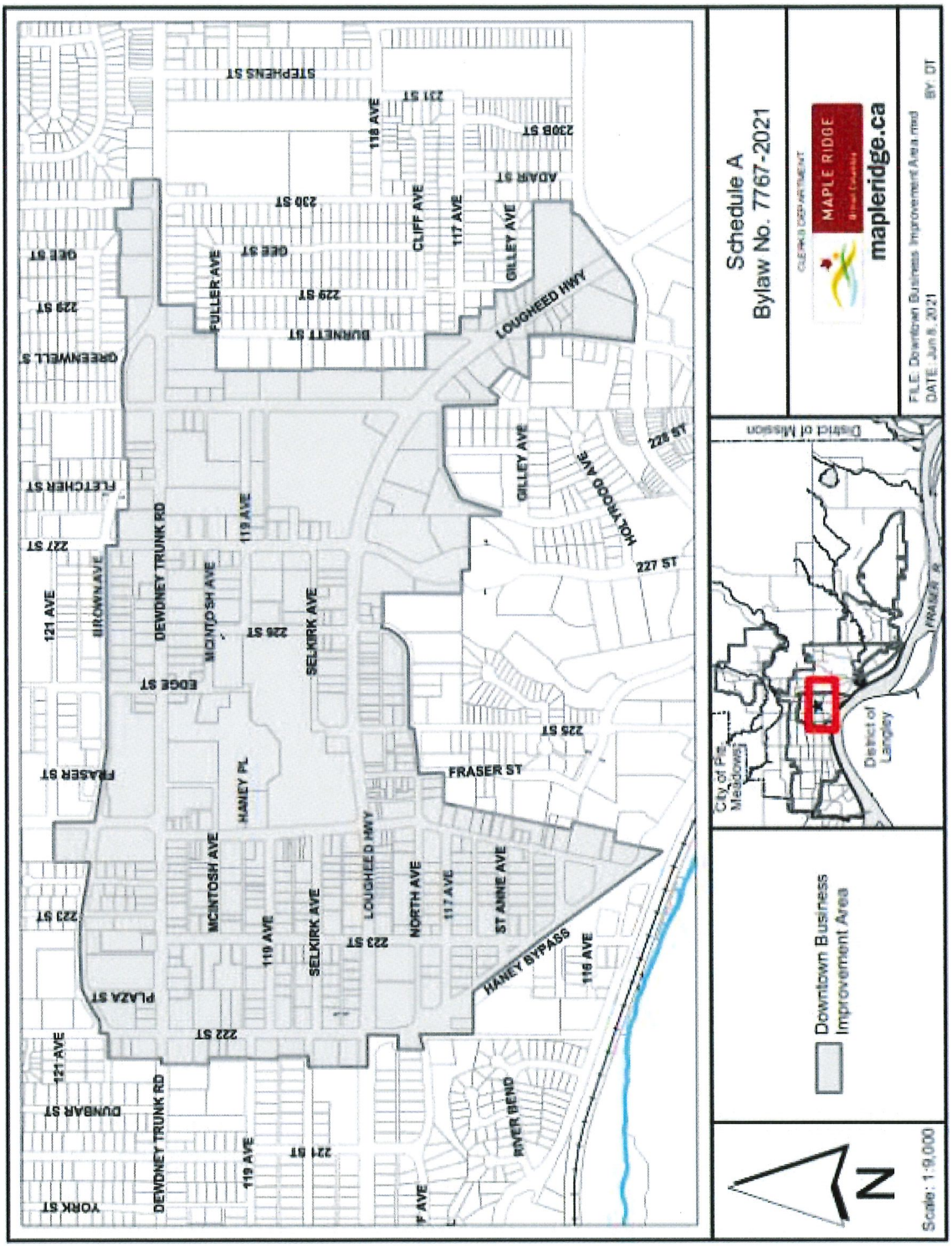
Attachment (B) Regulations for Sidewalk Cafes

REGULATIONS for SIDEWALK CAFÉ

These regulations clarify community objectives for sidewalk cafes in the commercial areas of the City of Maple Ridge.

- Sidewalk Café is permitted in the C3 and C2 zones.
- A minimum public sidewalk passage width of 2.1 meters (7ft) is required along the frontage of the café.
- A sidewalk café must be an extension with the abutting business and cannot be subleased.
- The café must be directly abutting and touching the frontage or flankage of the building to which it is associated. This is so that patrons and servers do not disrupt pedestrian traffic on the sidewalk.
- An enclosure is required to contain the café where more than 2 seats are provided per table. The maximum height of the enclosure shall be 121 cm (4ft) but not less than 91 cm (3ft). This is the height from the top of railings to the finish grade of the adjacent sidewalk. (see sample drawing 'A' and suggestion on type of enclosure)
- The café enclosure must be a construction style, which allows for removal within 24 hours, if so required.
- Open type café (without enclosure) may be permitted at the discretion of the Municipal Engineer. This is generally restricted to a table with two seats. Seating arrangements must not back onto the sidewalk.
- Seasonal flowering plants should be incorporated with the sidewalk café with enclosures. Proposed locations for planter box, hanging baskets must be shown on plan.
- The café must be wheelchair accessible.
- Permanent fixtures to City's sidewalk are not permitted.
- Exterior signage must comply with the City of Maple Ridge Sign bylaw no 7389 - 2017.
- The enclosure and covering must be approved, inspected and accepted by the Engineering Department prior to occupancy.

SCHEDULE C

Attachment (C) Downtown Business Improvement Area Map