

MAPLE RIDGE SOCIO-ECONOMIC TRENDS AND IMPLICATIONS FOR THE FUTURE OF ALBION FLATS

DISTRICT OF MAPLE RIDGE

SEPTEMBER 2010

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EXECUTIVE SUMMARY

With the increasingly rapid development of Maple Ridge, the Albion Flats have become a much discussed piece of land given its proximity to the Town Core, and its location on the Lougheed Highway.

This study is intended to provide a preliminary socio-economic background for the issues facing the Albion Flats. The study is focused on analysing the various land uses being considered for the site including overviews of land uses being considered for the site: industrial, commercial, residential, recreational and agricultural.

Key findings of this study include:

Albion Flats Location & Linkages:

- Investment in transportation infrastructure has dramatically improved regional access to Maple Ridge and the Albion Flats. With the enhanced connectivity to the rest of Metro Vancouver an increase in development activity for all types of land uses is expected in Maple Ridge;
- The Albion Flats' location on the Lougheed Highway just east of the Town Centre makes it extremely attractive for developers of any type of land use.
- The Albion Flats have a number of natural constraints to development: stream setbacks; seasonal flooding risk; location within a flood plain; forested marshlands; and geotechnical constraints (risk of liquefaction in earthquake).

Population:

- Maple Ridge will see 74% growth between 2006 and 2036.
- Maple Ridge population's contribution to the labour force was 37,200 members in 2006, of which 65% are employed outside the District. Approximately 9,800 people commute to Maple Ridge for work, creating a daytime working population of 23,000.
- With the population forecast to pass 100,000 between 2024 and 2025, and the associated 'opening' of the Urban Reserve for urban development, decisions will have to be made regarding desired patterns and densities of development.
- The population of the Town Centre is forecasted to increase by 201% between 2006 and 2036. Such an increase in population in the core will need to be matched by retail and public amenities.
- The number of residents aged 75+ is expected to increase by 256% between 2006 and 2036. Older residents will increase demand for walkable neighbourhoods, transit access and multi-family dwellings.
- Given proximity to transit, highways, urban areas and the Town Centre, the Albion Flats could be a desirable location for either new public amenities, retail, or residential uses to meet the growing population.

Industrial:

- Metro Vancouver has designated the Albion Flats as a 'Special Study Area' which based on history would facilitate the re-designation of the site to industrial uses.
- Vacancy on industrial lands was 5.9% in Q2 of 2010, slightly above the metro average of 4.2%.
- Industrial investment in the Maple Ridge area is increasing with the recent completion of the Golden Ears and Pitt River Bridges. The Albion Flats are located next to existing industrial lands, transportation infrastructure and possible servicing extensions.

Commercial:

- Maple Ridge as a whole and eastern Maple Ridge specifically has a shortage of retail space based on population and spending levels, making the Albion Flats an excellent potential location for commercial development.
 - East Maple Ridge is underserved with retail, as 95% of Maple Ridge's retail is located in the Town Core, or west of the Town Core along the Lougheed / Dewdney Trunk Trail corridor.
- Many major retailers are absent from the Maple Ridge / Pitt Meadows market.
- The impact on the Town Centre of any commercial development on the Albion Flats would need to be assessed.

Residential:

- Maple Ridge is forecast to have strong population growth rates, outpacing regional growth through to 2036. The location of the Albion Flats in proximity to the Town Centre, public transit and highways make it an attractive location for multi-family residences.

Agricultural:

- 89% of the Albion Flats are within the Agricultural Land Reserve. Any non-agricultural development in this area would first require ALR exclusion by the Agricultural Land Commission.
- Total farm receipts decreased in Maple Ridge between 2001 and 2006, but the agricultural uses of the Albion Flats were not optimized.
- The ALC has suggested that the lands north of 105th Avenue on the Albion Flats are better suited to agricultural uses than the lands to the south.

Recreational:

- The District of Maple Ridge, along with Pitt Meadows, has created a Parks, Recreation and Culture Master Plan that forecasts amenity goals and demands for the region. To accommodate population growth the

Master Plan envisions increasing the recreational facilities on the Albion Flats to include additional fields, a new indoor multi-purpose facility, and additional sheet of ice at Planet Ice, and an expanded parking lot.

Based on the preliminary socio-economic review, each of the land uses considered could utilize the Albion Flats. Assuming some portion of the site was removed from the ALR, there would be pressures on the District from a number of different sectors, raising the possibility for a mix of uses on the site.

This study does not provide use recommendations for the Albion Flats, nor does it rank the appropriateness of different land uses. Rather, its findings simply show that the Albion Flats is and will continue to be a much sought after piece of land for a variety of use types.

GPRA will use the findings contained in this report to produce a follow-up report which details the appropriateness of a variety of uses for the Albion Flats.

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1.0 INTRODUCTION

G.P. Rollo & Associates has been retained by the District of Maple Ridge to prepare an overview of the District's socio-economic characteristics and trends, and to discuss how these trends may influence future land uses on the Albion Flats.

The Albion Flats includes 311 acres of mostly unimproved land whose future use has come under increasing scrutiny from the land's various stakeholders. The goal of this report is to provide background to understand context facing the Albion Flats.

This study includes analyses of the 5 land uses below and their potential to be developed on the Albion Flats:

- Residential
- Retail Commercial
- Industrial
- Agricultural
- Community & Recreational

The conclusions of this study will inform a subsequent study that will involve in-depth market assessment of demand for commercial, industrial, residential, agricultural, as well as commercial and recreational uses on the Albion Flats.

2.0 INTRODUCTION TO ALBION FLATS & MAPLE RIDGE

2.1 OVERVIEW OF ALBION FLATS

The District of Maple Ridge is working towards preparation of a concept plan for the Albion Flats by March 31st 2011. The demand for a variety of land uses and their appropriateness for location at Albion Flats are being investigated. This introduction provides a brief overview of the Albion Flats' current uses, ownership structure, perspectives on the lands from a variety of stakeholders and next steps.

The Albion Flats is comprised of 125.8 hectares (310.9 acres) of mostly ALR land in the District of Maple Ridge.¹ The area is bounded to the west and southwest by Lougheed Highway, to the north and northwest by Tamarack Lane and 105th Avenue, and to the east by 240th Street. The site is comprised of 52 individual land parcels of varying sizes and shapes, and ownership is divided amongst 38 parties.

OCP Land Use Designations at Albion Flats comprise a range of uses: commercial, institutional, agricultural, residential, park/greenspace and public use. Agricultural land uses are designated for nearly 89 hectares (71%) of total area. Parks and greenspace are designated for 26% (33 hectares), institutional uses for 2% (2.5 hectares) and the combination of residential and commercial uses for 1% (1.4 ha). Actual active land uses at Albion do not necessarily reflect OCP land use designations. For instance, while 71% of the site is agriculturally designated, only 23% of the site is considered as actively agricultural. Additionally, while only 26% of the site is considered 'greenspace' in the OCP, 87% of the site is vegetated.

Albion Flats also has a number of environmental constraints including multiple streams, areas that flood seasonally, and geotechnical features that could make it susceptible to liquefaction during an earthquake. For example, totalling the area for all the stream setbacks on the site is estimated to equal 121 acres.

The Albion Flats has been designated Agricultural in the Draft Metro Vancouver Regional Growth Strategy (RGS) and is contiguous with the Urban Containment Boundary. The Albion Flats has also been identified as a "Special Study Area" in the draft RGS which has the following implications:

- 'Special Study Area' implies that re-designating agricultural lands only requires 50% +1 votes from the Metro Vancouver Board.
- If land designated for agricultural use was not a 'Special Study Area' any re-designation would require the following steps:
 - An approving vote of 2/3rds from the Metro Vancouver Board.
 - Public Hearing

Albion Flats is designated Agricultural in the Draft RGS and is contiguous with the Urban Containment Boundary. It has not been released from the ALR.

¹ 275.8 acres of 310.9 acres (89%) is located within the ALR.

There are many competing visions for what role the Albion Flats should play in the future growth of Maple Ridge. Stakeholders include the 38 landowners at the site (including the District of Maple Ridge), the ALC, the Metro Region, businesses across the region and all citizens of the District.

2.2 LOCATION OF ALBION FLATS

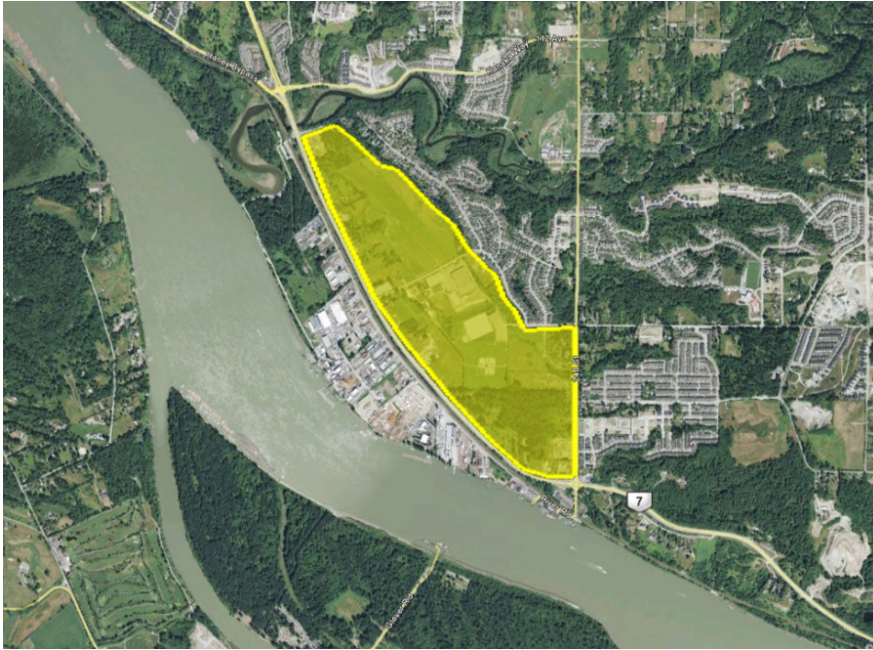
The Albion Flats include 311 acres of land located south east of the Maple Ridge Town Centre, on the edge of the Fraser River. The Albion Flats are displayed within the Metro Vancouver context in the map below:

Figure 1: Albion Flats and Metro Vancouver



Figure 2 displays the boundaries of the Albion Flats. Immediate adjacencies include Highway #7 (Lougheed Highway) to the west and southwest, Tamarack Lane to the north, the back yards of houses located on the western side of Tamarack Lane and 105th Avenue to the north east, and 240th Street to the south east of the site.

Figure 2: The Albion Flats and Surrounding Areas



The majority of the Albion Flats are greenfields (wild in some instances), including some playing fields. There are some site improvements. The most important improvement is the Planet Ice Sports Entertainment facility, which includes 2 NHL sized rinks and an adjacent curling club with 6 regulation sized sheets. The Albion Fairgrounds are also located on the site, which include two 6,000 sq. ft. exhibition halls and a barn.

The adjacent land uses to the south-west of the Albion Flats are primarily industrial, including companies that operate metal recycling and salvage operations. To the north-east of the Albion Flats is the Kanaka Creek, while the land uses to the east and south of the site are primarily single-family residential.

2.3 ENVIRONMENTAL CONSTRAINTS

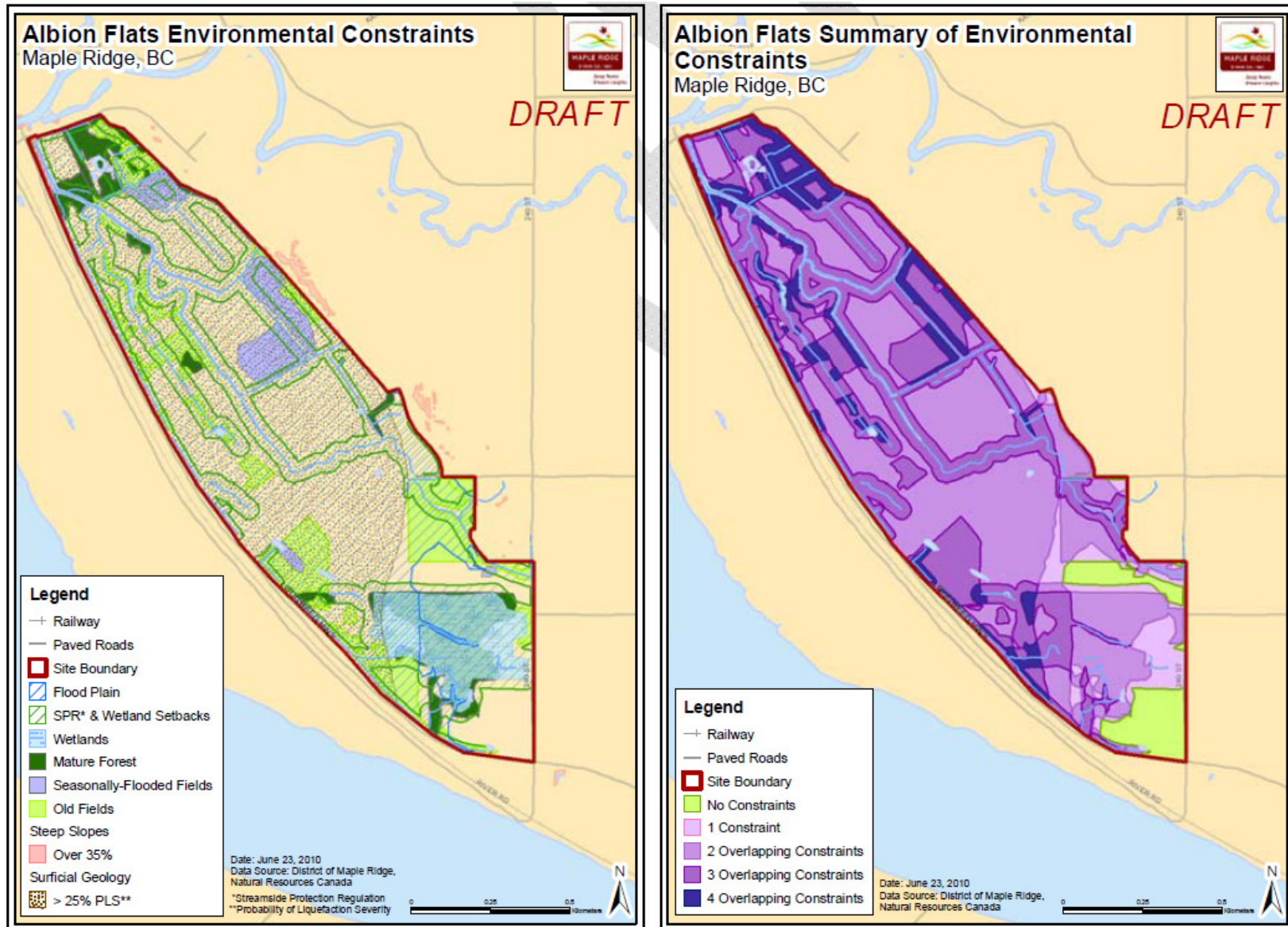
A 2010 Draft Environmental Baseline study produced by HBLanarc for the Albion Flats provides a non-hierarchical review of all the environmental constraints on the site. The two maps on the following page graphically display the areas on the Albion Flats that face an environmental constraint.

Within the map on the left, only the lands in green face no environmental constraints. The areas shaded with the lightest pink face only 1 constraint, while the areas shaded with the darkest purple face 4 environmental constraint.

The map on the right displays a number of the environmental constraints facing the site including the Floodplain line which covers 83.7% of the site, or 260.4 acres, as well as the geological hazard of liquefaction which covers 72.6% of the site.

Other important constraints that are listed in the figure on the right include watershed setbacks, wetlands, seasonally flooded fields, and mature forests.

Figure 3: Draft Albion Flats Environmental Constraints



The following table calculates the land area based on the number of environmental constraints it faces.

Table 1: Albion Flats Environmental Constraints

Overlapping Constraints	Area (hectares)	Area (Acres)	% of Total Area
No Environmental Constraints	6.6	16.3	5%
1 Constraint	7.5	18.5	6%
2 Overlapping Constraints	54.3	134.2	43%
3 Overlapping Constraints	45.8	113.1	36%
4 Overlapping Constraints	11.7	28.8	9%
Total	125.8	310.9	100%

Source: HB Lanarc

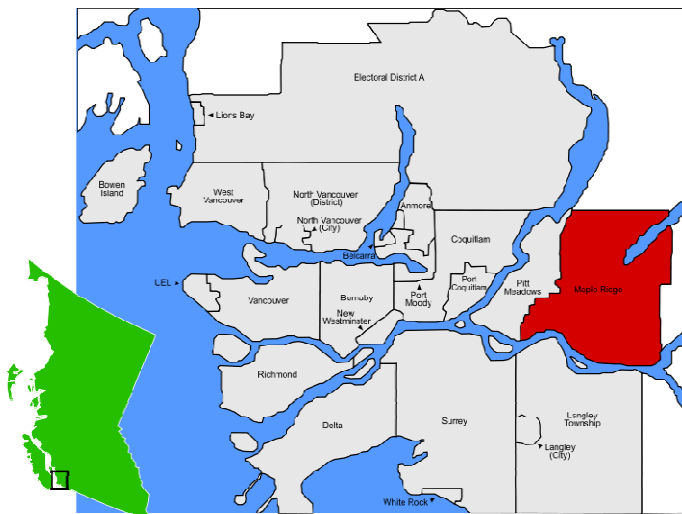
It should be noted that these constraints were not ranked in terms of importance, and some of the constraints could be mitigated within a development program.

The ranking of environmental constraints was not considered in the HBL Environmental Baseline Study in order to allow the District and the public an opportunity to consider which environmental features it considers most important.

2.4 MAPLE RIDGE: LOCATION AND CONNECTIVITY TO VANCOUVER

Maple Ridge is located on the eastern edge of Metro Vancouver, bordering on the City of Pitt Meadows to the west, Langley Township to the south, and the District of Mission to the east. North of Maple Ridge is the 155,000 acres Golden Ears Provincial Park.

Figure 4: Maple Ridge and Metro Vancouver Municipalities



The primary flow of traffic from Maple Ridge is either westbound towards Vancouver or southbound towards Langley and Surrey.

Significant recent infrastructure upgrades have improved traffic flows for both north-south and east-west traffic for Maple Ridge residents. Major infrastructure upgrades for Maple Ridge residents include:

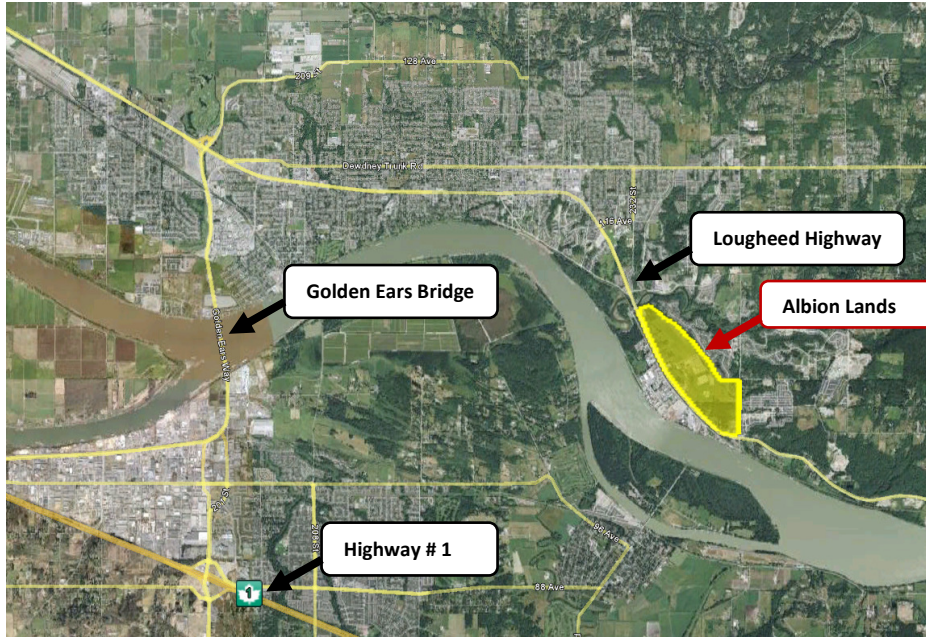
- **The Golden Ears Bridge:** A six lane toll-bridge which replaced the Albion Ferry service in 2009.
- **New Pitt Meadows Bridge:** A 7 lane bridge with 4 eastbound lanes and 3 westbound lanes, opened in 2009. The Pitt Meadows Bridge is part of Translink's, North Fraser Perimeter Road Project along with the Mary Hill Interchange Project.
- **Mary Hill Interchange Project:** Part of the North Fraser Perimeter Road Project that will enhance vehicle connectivity between Maple Ridge and all areas west, with planned road upgrades through to New Westminster.



The new Pitt River Bridge and Mary Hill Interchange

2.5 HIGHWAY LINKAGES

Maple Ridge is linked to the rest of Metro Vancouver through a number of Highways. The primary east west Highway connection is Highway #7 (Lougheed Highway), which travels north of the Fraser River through Port Coquitlam, Coquitlam, and Burnaby until reaching Vancouver where Highway 7 becomes Broadway Street.



The primary east-west highway in Metro Vancouver is Highway #1 (Trans-Canada Highway), which is now accessible to residents of Maple Ridge via the Golden Ears Bridge.

Golden Ears Bridge

Until 2009 the only southbound connection for Maple Ridge and Pitt Meadows residents was the Albion Ferry. During busy times, waits of over an hour for the Albion Ferry were not uncommon. During its last years in operation, the Albion Ferry was reported to have carried 4.0 million passengers and 1.5 million vehicles annually.

The Golden Ears Bridge now provides Maple Ridge residents direct access to municipalities south of the Fraser River and to the Trans-Canada Highway (Highway #1), the primary east-west Highway in the Metro Vancouver region.

In 2009 construction of the 6 lane Golden Ears Bridge was completed; it is the first toll bridge in Metro Vancouver since the 1960's.

Type of Vehicle	Toll-Device	Pre-paid	Without a toll device
Car	\$2.75	\$3.30	\$3.90
Truck or Bus	\$5.55	\$6.10	\$6.65
Large truck	\$8.30	\$8.90	\$9.40
Motorcycle	n/a	\$1.40	\$2.50

Perhaps as a result of the tolls, vehicular traffic has been below expectations, with an estimated average of 20,000 vehicles a day, where average daily traffic was forecasted to be 29,000 vehicles.

There had been some consideration to reduce the tolls to try to increase traffic; however, in the past three months, according to Translink, average daily traffic has been increasing. Daily traffic on the bridge in April averaged 23,322, increasing to 24,088 in May and 24,639 in June 2010.

Lougheed Highway (Highway #7)

The Lougheed Highway is the primary east-west arterial north of the Fraser River. Access west of Maple Ridge has recently been improved with the construction of the new Pitt River Bridge and the Mary Hill Interchange Project.

Driving time from Maple Ridge to Vancouver (Broadway & Granville) is estimated to take 1 hour using the Lougheed Highway.

The most recent traffic counts available from Maple Ridge were collected in 2008. On Lougheed Highway west of Kanaka Way, average weekday traffic was 17,940. On Lougheed Highway East of the Haney By-Pass average weekday traffic was 23,570.

2.6 TRANSIT CONNECTIVITY

Maple Ridge is served by a regional bus service, as well as the West Coast Express, which provides rail service to downtown Vancouver. Given the large area of Maple Ridge the bus service struggles to provide residents with convenient transit access to the Town Centre, so most residents get around the District by car.

Maple Ridge has two West Coast Express stations, the Maple Meadows station near the intersection of Hammond Road and Maple Meadows Way (near the entrance to Golden Ears Bridge), and Port Haney on River Road and 223rd Street. The Port Haney Station is closest to the Albion Lands. Translink's 2009 Capital Plan includes plans for a new station location in the Albion area in 2011 or 2012.

The cost for travelling to Vancouver from either of the Maple Ridge stations is \$8.25 for a one-way trip. A trip from Maple Ridge to Waterfront Station in Vancouver will take either 50 minutes or 56 minutes from Maple Meadows Station or Port Haney Station.

2.7 AIRPORT CONNECTIVITY

Maple Ridge has direct access to the Pitt Meadows Regional Airport, which is the only airport located north of the Fraser River.

The Pitt Meadows Regional Airport has one 1,310 metre and two 762 metre paved runways, as well as a take-off and landing area for float planes. The airport currently offers regular air taxi flights to Victoria and Nanaimo, as well as chartered flights. Other airport services include flight training, avionics sales and service, as well as aircraft sales and repair.

The Pitt Meadows Regional Airport sees potential areas for growth to include increased passenger traffic, including a passenger terminal with a Canada

Customs office to allow for international flights, and increased traffic from float planes as well as private and corporate jets.

The Vancouver International Airport (YVR), located in Richmond, is the largest airport in the Metro Vancouver Region and provides Maple Ridge residents and companies' connections to the rest of the world for passenger and cargo flights. YVR is approximately 50 km and a one hour drive from Maple Ridge.

The Abbotsford International Airport (YXX) provides regular flights to Edmonton, Calgary, Nanaimo, and Victoria. Charter flights are also available to Cancun and Puerto Vallarta in Mexico. In 2009 YXX was Canada's 17th most busy airport. The Abbotsford International Airport is approximately 35 km or a 35 minute drive from Maple Ridge.

2.8 RAIL CONNECTIVITY (SHIPPING)

Maple Ridge is in close proximity to CPR's Vancouver Intermodal Facility (VIF), located in Pitt Meadows. The Vancouver Intermodal Facility is CPR's hub for container traffic on the Pacific Coast of North America.

From its Pitt Meadows facility, CPR is the only company that can ship containers to Chicago only using its own tracks. As a result CPR offers all inland shipping services from Vancouver to Chicago for large groups such as China Ocean Shipping Company (COSCO), and Norasia out of Switzerland.

2.9 IMPLICATIONS OF LOCATION & LINKAGES

The massive investment in transportation infrastructure at the main river crossings that connect Maple Ridge to the rest of the Metro Vancouver region will increase development activity in the area for all types of land uses.

On a more local level, the Albion Flats is very likely to continually be the object of development pressure as it is located between the Maple Ridge Town Centre, the growth node of Albion and next to industrial lands. The fact that the Albion Flats faces urban encroachment is recognized by the Agricultural Land Commission.

3.0 ECONOMIC OVERVIEW AND OUTLOOK

3.1 GENERAL ECONOMY

The Maple Ridge area is both a residential and industrial suburb of Vancouver. The economy has diversified in recent years, with growth of businesses across the service, transportation, trade and manufacturing sectors. Forestry, mining and agriculture have traditionally been major economic contributors and remain so. In the forestry sector, manufacturing is the dominant activity at various wood processing facilities throughout the region.

The area is projected to grow in importance in the coming years due to transportation infrastructure improvements, namely the Golden Ears and new Pitt River bridges.

3.2 GROWTH OUTLOOK

The Real Estate Investment Network (REIN) recently named Maple Ridge (along with Pitt Meadows) the No.2 location in which to invest in B.C.²² REIN cites the growth potential of newfound accessibility, provided by the Golden Ears and new Pitt River bridges along with the twinning of Highway 7. Accessibility will bring consistent long-term growth as companies from across the region look to Maple Ridge as a lower-cost yet accessible alternative to high priced offices, industrial sites and business parks elsewhere.

Maple Ridge is an established centre of agriculture and forestry. It is also poised to attract significant growth in sectors such as high tech, multimedia, education and tourism.

3.3 LABOUR FORCE

Maple Ridge residents contributed 37,200 members to the labour force in 2006, a 69.6% participation rate. Unemployment amongst Maple Ridge residents was 4.6%.

The top 5 industries that Maple Ridge residents are employed in are: Retail trade (12%), Health care (11%), Manufacturing (11%), construction (10%), and educational services (7%).

It is estimated that approximately 65% of Maple Ridge labour force participants, or 24,200 people, are employed outside of the District. Therefore approximately 13,200 people who are employed within Maple Ridge also reside within the District. An additional 9,800 people make the daily commute to jobs in Maple Ridge from elsewhere in the Lower Mainland and beyond, for a total daily employment population of just over 23,000 in 2006. Approximately 6,500 members of Maple Ridge's daytime employee population, or 28% of total, work within the Town Centre.

²² "British Columbia's Top Investment Towns Named For 2010-2015." Real Estate Investment Network, June 2010.

Figure 5: Businesses in Maple Ridge, by Industry**3.4 BUSINESS SECTORS**

Maple Ridge had nearly 2,900 active businesses in 2010. Over 50% of these businesses (1,450) were home-based. Within the home-based business category, the top-5 industries were: contractors (25%), home & industry services (12%), certified contractors (7.4%), community care (6.3%) and business services (5%).

Overall the top 5 business categories in Maple Ridge in 2010 are:

1. Contractors (383 businesses, 13.2% of total)
2. Home & Industry Services (189 businesses, 6.5% of total)
3. Health services (164 businesses, 5.7% of total)
4. Food & Beverage services (164 businesses, 5.7% of total)
5. Automotive (163 businesses, 5.6% of total).

The table at right provides a complete breakdown of Maple Ridge businesses by industry.

Businesses: District of Maple Ridge				
Industry	Commercial	Home Based	Total	Category as % of Total
Adult	1	0	1	0.0%
Agriculture	5	14	19	0.7%
Animal Services	18	44	62	2.1%
Architect, Engineer, Science & Tech	9	15	24	0.8%
Arts & Entertainment Retail	8	0	8	0.3%
Arts & Entertainment Services	2	17	19	0.7%
Arts, Entertainment & Assembly Centre	2	0	2	0.1%
Automotive	130	33	163	5.6%
Business & Office Retail	4	0	4	0.1%
Business Services	19	73	92	3.2%
Certified Contractor	10	108	118	4.1%
Clothing & Accessory Retail	24	0	24	0.8%
Clothing & Laundry Service	19	8	27	0.9%
Community Care	45	91	136	4.7%
Community Groups	18	5	23	0.8%
Computer & Technology Services	7	52	59	2.0%
Contractors	26	357	383	13.2%
Design Services	6	37	43	1.5%
Direct Sales		33	33	1.1%
Education & Instruction	25	48	73	2.5%
Environmental & Ecological	2	3	5	0.2%
Financial & Institutional Services	60	36	96	3.3%
Food & Beverage Retail	55	0	55	1.9%
Food & Beverage Services	153	11	164	5.7%
Health Retail	22	0	22	0.8%
Health Services	150	14	164	5.7%
Home & Industry Services	17	172	189	6.5%
Home & Property Retail	65	8	73	2.5%
Homecraft	0	39	39	1.3%
Legal Services	19	4	23	0.8%
Manufacturing	115	11	126	4.4%
Personal Services	79	23	102	3.5%
Photography & Film	3	23	26	0.9%
Publisher	2	5	7	0.2%
Real Estate	17	5	22	0.8%
Recycling & Salvage	8	1	9	0.3%
Rental Service	4	6	10	0.3%
Rental Unit	78	21	99	3.4%
Resource Industry	3	0	3	0.1%
Retail	60	3	63	2.2%
Road Paving & Parking	1	7	8	0.3%
Second Hand Dealer	21	0	21	0.7%
Security	5	17	22	0.8%
Sports & Recreation Centre	28	2	30	1.0%
Sports & Recreation Retail	11	2	13	0.4%
Sports & Recreation Services	9	29	38	1.3%
Temporary Vendor	6	0	6	0.2%
Transport Goods & Services	10	35	45	1.6%
Travel	3	5	8	0.3%
Vending Machine	2	1	3	0.1%
Warehousing & Storage	17	0	17	0.6%
Wholesale & Distribution	39	32	71	2.5%
	1,442	1,450	2,892	
	49.86%	50.14%	100.00%	
Source: District of Maple Ridge				

3.5 INDUSTRIAL OUTLOOK³

Key Figures: The Maple Ridge industrial market in 2010 contains 2,210,000 square feet of building space, an increase of 307,500 square feet (16.2%) since 2002, or an average increase of 38,500 square feet per year over 8 years. Maple Ridge accounts for 1.2% of Metro Vancouver's 183.8 million square feet of industrial inventory. Industrial space vacancy in Maple Ridge stands at approximately 5.9% in 2Q 2010 (~451,000 sq.ft.), up 1.2% from 1Q 2010 and up 4.6% from 4Q 2009. The Metro Vancouver industrial vacancy rate at the end of 2Q 2010 stood at 4.2%. Vacancy rates are expected to plateau over the next several quarters across the region. Land options for large users remain limited in both Maple Ridge and Pitt Meadows, but supply does exist for small users. The average asking lease rate (per sq.ft. triple-net⁴) in Maple Ridge is \$7.00-\$8.00. This compares to \$6.00-\$8.00 in Abbotsford, \$6.50-\$8.50 in Port Coquitlam and \$6.00-\$8.00 in Surrey.⁵

Trends: Maple Ridge's industrial base has evolved from being heavily resource-based to one that is diversified amongst multiple heavy and light sectors including manufacturing, services, repair and distribution. Current and future trends will call for more spaces suitable to light industrial and business-park uses.

Opportunities: Over the past decade, industrial growth in Maple Ridge has been a function of its relatively affordable industrial lands (vis-à-vis other Lower Mainland municipalities) combined with relatively limited supply elsewhere in Metro Vancouver's northeast sector. However over the past 5 years, growth has also been driven by anticipation of transportation infrastructure improvements, namely the new Golden Ears Bridge and upgraded Pitt River Bridge. Today, Maple Ridge is poised to experience greater growth and diversity in its industrial market.

Constraints: Light industrial and Business Park users will, by and large, make location decisions based on accessibility to transportation connections. As a result, Pitt Meadows' light industrial and business park space near the northern end of the Golden Ears Bridge will compete with Maple Ridge for businesses. Pitt Meadows' competitive areas include the 65 acres Lougheed Highway Business Park and the 100 acres of light industrial space at the south end of Harris Road.

³ See **section 6.0** for a detailed breakdown of Maple Ridge industrial inventory and trends.

⁴ Including proportionate share of property taxes, insurance and operating expenses.

⁵ DTZ Barnicke: *Metro Vancouver Industrial Report*. 2Q 2010.

3.6 COMMERCIAL OUTLOOK⁶

Key Figures: Maple Ridge has nearly 3.2 million square feet of commercial retail space. Approximately 25% of this space is located at 4 major food-anchored shopping centres of 50,000+ square feet. The rest is located in smaller open-air centre, enclosed malls and street-front locations. Vacancy is currently around 1%, however many of the spaces are underutilized or underperforming.

Retail Trends: In North America, street front retailing is in strong recovery. This is evidenced by the proliferation of lifestyle centre development across the country (e.g. Park Royal Village, which provides an idealized main street experience). Downtowns in small/medium sized municipalities have an opportunity to revitalize by differentiating themselves from these lifestyle projects through provision of exciting street-oriented shopping, culture and entertainment experiences not available elsewhere.

Downtowns are also increasing their mix of uses, both in intensity and diversity. An increase of non-retail uses downtown such as residential, office, and hospitality integrated into projects above grade-level retail can bring 24-7 land use to a town centre. Experience in small towns across Canada has shown that, when successful, this mixing leads to foot traffic and purchasing on main streets before and after work hours.

Fundamentally, successful retail streets are well anchored. For many years, attempts at downtown revitalization were done through the development of large supermarkets or supermarket-anchored projects surrounded by a sea of parking. These self-contained projects had limited cross-shopping with neighbouring shops and a lack of relationship with neighbouring uses and the other side of the street. Today the trend is towards smaller grocery stores (10,000-25,000 sq.ft.) in town centres, with strong street interfaces. Another key trend in street anchoring is the reintroduction of 'leisure time' and 'non-retail anchors' in traditionally retail environments. Cultural uses downtown can support other businesses like restaurants and specialty retail.

Maple Ridge has downtown non-retail anchors in the Arts Centre & Theatre, and the Leisure and Youth Centres. Improving the integration of these anchors with downtown retail, potentially through adjacent restaurants with outdoor seating, would significantly improve the vibrancy of the area. Additionally, the existing Town Centre street grid provides the

⁶ See **section 7.0** for a detailed breakdown of Maple Ridge commercial inventory and trends.

opportunity to have a compact, pedestrian-friendly vibrant core with the addition of residential density.

Opportunities: Maple Ridge can take advantage of its non-retail downtown anchors and street infrastructure revitalization along 224th Street to spur downtown revitalization. Retail, hospitality and other uses that complement the town centre cultural precinct can be identified and strategies developed to attract those uses. Significant engagement with stakeholders, including building owners and landlords, will be required. Opportunities for commercial business growth exist elsewhere in Maple Ridge, primarily in the growth areas to the south-west (Albion area) and in Silver Valley to the north.

Relocation of non-pedestrian-friendly or pedestrian-oriented businesses from the town centre to highway fronting locations could provide an opportunity for mixed-use residential, office, cultural and retail to be developed at those sites in the town centre.

Constraints: The development of large-format retail or attractive pedestrian-oriented retail commercial environments outside of the Town Centre could be an impediment to attracting retail tenants downtown. The existence of an enclosed mall (Haney Place) at 224th and Lougheed Hwy, its poor connectivity and interface with 224th, Lougheed or the civic centre, and the lack of cooperation regarding mall repositioning or linkage upgrades, creates an impediment to realizing the full potential of 224th between Dewdney and Lougheed as the heart of a revitalized town centre.

3.7 RESIDENTIAL OUTLOOK⁷

Key Figures: In 2006, Maple Ridge had a population of approximately 71,400 and over 25,000 dwelling units. By 2010, the population was an estimated 76,650, and the dwelling unit count increased to over 26,000 units. Ownership rates stood at approximately 81%. The benchmark price for a single family home was \$464,125 in June 2010, up 34% since 2005. A number of new residential developments are aimed at the growing seniors market.

Trends: An aging population, increasing sensitivity to issues of sustainability, changing desires around lifestyle consideration (walking vs. driving, proximity to amenities), and projected long-term decrease in average household sizes are some of the key trends that will affect residential demand in the coming years. A decreasing fraction of demand will come from traditional family households due to an aging population. Older age groups have a greater propensity to demand smaller single family and multi-family dwelling units, and the desire to own a home vs. rent begins to drop in age groups above 75. Overall the market will demand more walkable communities with a greater mix of uses. Mixed-use can include a mix of intensities of a single use (e.g. mixes of multi-family, duplexes, small lot singles, and large lot singles in a small area), and mixing of land use types (e.g. commercial with residential and office horizontally or vertically integrated).

Opportunities: In the coming years there is likely to be opportunity for greater intensification of residential in the Maple Ridge Town Centre, including more multi-family, as recommended in the Town Centre Area Plan. This is also actively encouraged in the Metro Vancouver Draft Regional Growth Strategy, which has designated Maple Ridge Town Centre one of the region's key "livable centres" where intensification of the amount and diversity of housing is encouraged. A growing population and the relative affordability and amenity (cultural, recreational and natural) of Maple Ridge will also serve for long-term demand for single family homes.

Constraints: There have been issues with increasing density in Maple Ridge, including in the Town Centre where developers or land owners have not taken a leadership role. Parking regulations and the lack of local transit have also been cited as slowing the densification of the Town Centre. Gaining support for density and land use mixing will require long-term engagement with a variety of stakeholders. Additional constraints to residential growth will be land supply.

⁷ See **section 8.0** for a detailed breakdown of Maple Ridge residential inventory and trends.

4.0 DEMOGRAPHIC PROFILE

An understanding of the demographic profile of Maple Ridge is necessary for the analysis of commercial, residential and recreational opportunities across the District and at the Albion Flats. Section 4 provides a demographic overview to 2006, while Section 5 explores future trends.

4.1 POPULATION AND HISTORIC GROWTH

The 2006 Census recorded a population of 68,949 in Maple Ridge, up 9.1% from the 2001 Census population of 63,170. In the years between Censuses, Maple Ridge recorded the third-highest growth rate of Metro Vancouver municipalities, trailing only Surrey (13.6%) and Port Moody (16.4%). Maple Ridge's growth rate from 2001 to 2006 outpaced the rates for Metro Vancouver and the Province by 2.6% and 3.5% respectively.

Table 2: Comparative Population Growth, Metro Vancouver Municipalities, 2001-2006

Comparative Population Growth, 2001 to 2006				
	2001	2006	% Growth	Change 01-06
Port Moody	23,644	27,512	16.4%	3,868
Surrey	347,821	394,976	13.6%	47,155
Maple Ridge	63,170	68,949	9.1%	5,779
Langley (DM)	86,897	93,726	7.9%	6,829
New Westminster	54,657	58,549	7.1%	3,892
Metro Vancouver	1,986,966	2,116,581	6.5%	129,615
Pitt Meadows	14,671	15,623	6.5%	952
Richmond	164,346	174,461	6.2%	10,115
Province of B.C.	3,907,739	4,113,487	5.3%	205,748
Burnaby	193,955	202,799	4.6%	8,844
P. Coquitlam	51,258	52,687	2.8%	1,429
White Rock	18,251	18,755	2.8%	504
N. Van (city)	44,093	45,165	2.4%	1,072
W. Van	41,422	42,131	1.7%	709
Coquitlam	112,891	114,565	1.5%	1,674
N. Van (DM)	82,311	82,562	0.3%	251
Langley (city)	23,644	23,606	-0.2%	-38
Delta	96,951	96,723	-0.2%	-228
2006 Census of Canada				

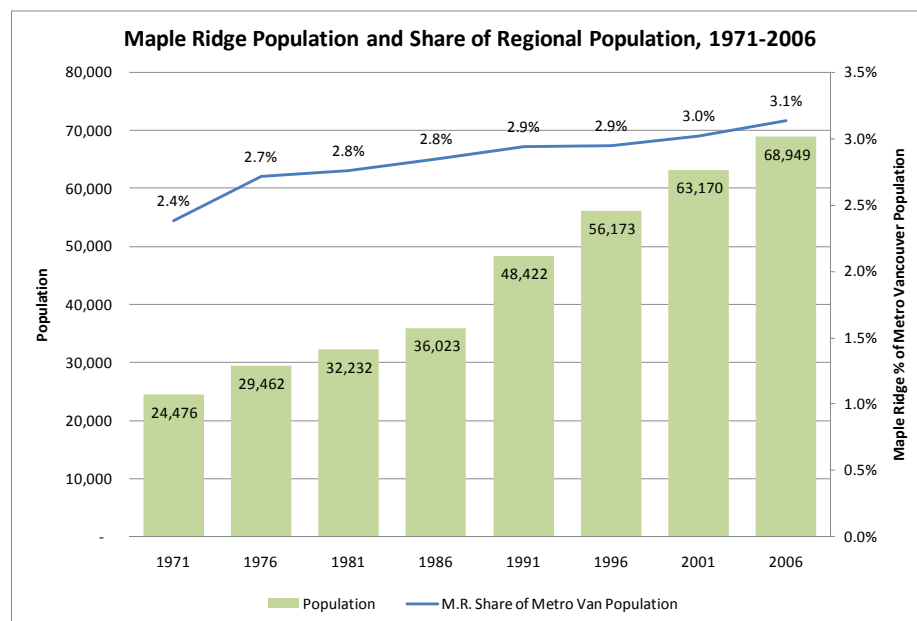
Between 1971 and 2006, Maple Ridge experienced relatively strong compound annual growth of 3.0%. By comparison, Metro Vancouver experienced compound annual growth of 2.2% over the same period. In each 5-year period from 1971 to 2006, Maple Ridge had a faster rate of growth than Metro Vancouver.

Table 3: Maple Ridge and Metro Vancouver Population Growth, 1971 to 2006

Maple Ridge and Metro Vancouver Population Growth, 1971 to 2006						
Year	Population	Population Growth over 5-Year Periods	M.R. 5-Year Growth Rate	Metro Vancouver 5-Year Growth Rate	Average Annual Population Growth over 5-Year Period, Maple Ridge	Average Annual Population Growth over 5-Year Period, Metro Vancouver
1971	24,476					
1976	29,462	4,986	20.4%	5.5%	3.78%	1.08%
1981	32,232	2,770	9.4%	7.8%	1.81%	1.51%
1986	36,023	3,791	11.8%	8.2%	2.25%	1.60%
1991	48,422	12,399	34.4%	30.1%	6.09%	5.41%
1996	56,173	7,751	16.0%	15.7%	3.01%	2.96%
2001	63,170	6,997	12.5%	9.8%	2.38%	1.88%
2006	68,949	5,779	9.1%	5.1%	1.77%	1.00%

Sources: Statistics Canada 2006 Census

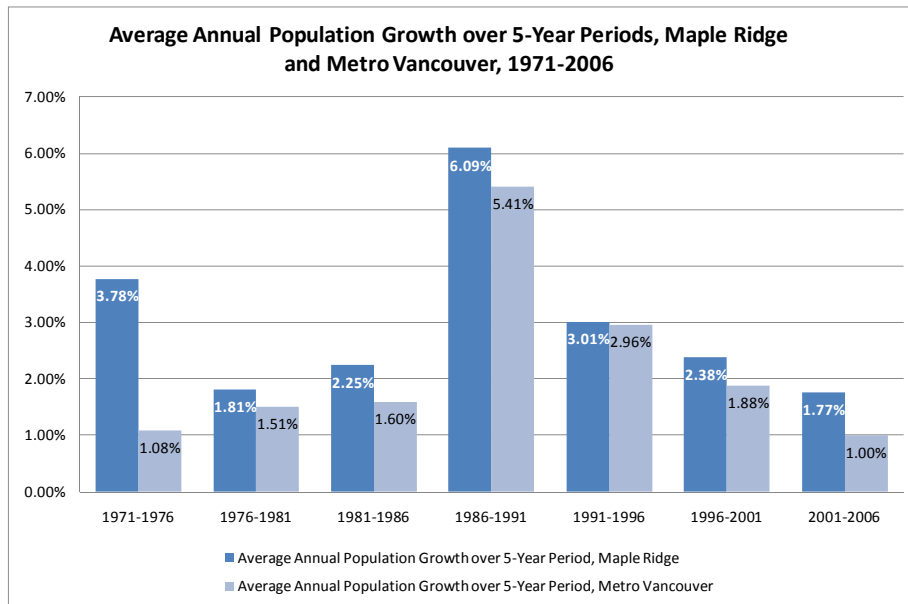
Since 1971, Maple Ridge has steadily increased its share of Metro Vancouver regional population. Over 35 years it has steadily climbed, from 2.4% in 1971 to 2.8% in 1981, to 2.9% by 1991 and to 3.1% by 2006. Between 1996 and 2006, 3.1% of Metro Vancouver's growth occurred in Maple Ridge. In comparison, 3.4% of Metro's growth occurred in Maple Ridge between 1986 and 1996, and 3.6% occurred in Maple Ridge from 1976 to 1986.

Figure 6: Maple Ridge Population and Share of Regional Population, 1971-2006

Source: Statistics Canada

Maple Ridge's rate of population growth has varied considerably from 1976 to 2006. The District's greatest spurt of growth occurred between 1986 and 2001 when it recorded an average annual growth rate of over 6% (compared to sub-3% for the Region). Average annual growth declined to 3% from 1991 to 1996, 2.4% from 1996 to 2001 and 1.8% from 2001 to 2006. This decline is in line with the broader decline in population growth rates across Metro Vancouver.

Figure 7: Average Annual Population Growth over 5-Year Periods, Maple Ridge and Metro Vancouver, 1971 to 2006



Source: Statistics Canada, BC Stats

4.2 POPULATION AGE STRUCTURE

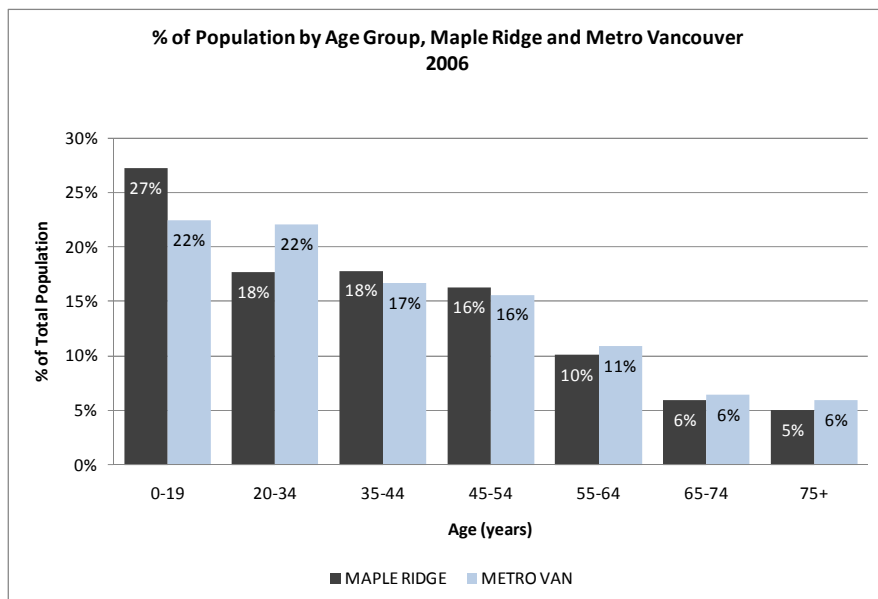
In 2006, the median age of the District of Maple Ridge was 38.1 years old (up from 36.7 in 2001). This compares to a median age of 38.4 for Metro Vancouver.

At the time of the last Census, Maple Ridge had a relatively high proportion of residents aged 0-19 (27%) versus Metro Vancouver (22%). This is likely due to the longstanding appeal of relatively lower housing prices for young families as well as proximity to outdoor recreational amenities.

Maple Ridge's relatively low proportion of residents age 20-34 (18%) versus Metro Vancouver (22%) likely reflects the movement of young adults to more urban areas to pursue education and employment opportunities, as well as more urban lifestyle amenities.

The proportion of the population aged 35-44 is slightly higher in Maple Ridge than in Metro Vancouver (18% vs. 17%). Across all other age groups, the percent difference between Maple Ridge and Metro Vancouver is no more than 1% in either direction.

Figure 8: Percent of Population by Age Group, Maple Ridge and Metro Vancouver, 2006

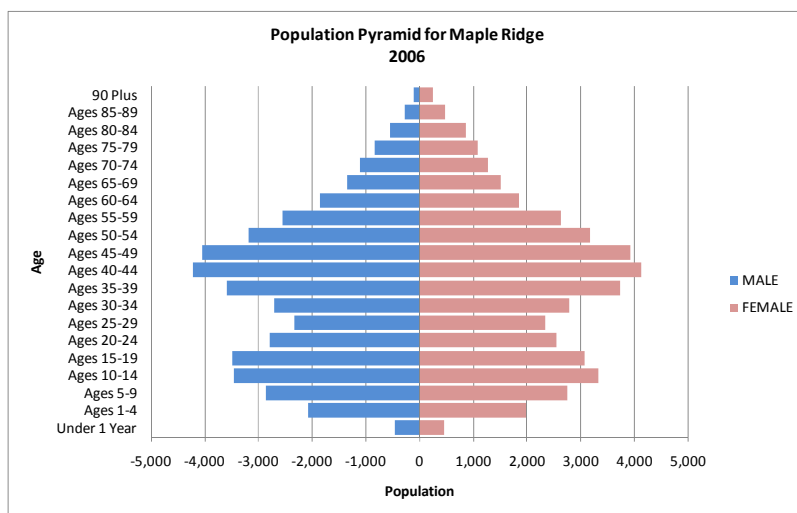


Source: Statistics Canada, BC Stats

Figure 9 below is a population pyramid showing the size, age and sex distribution of Maple Ridge in 2006. The bulge in the middle of the pyramid – from ages 40 to 59 – represents the aging baby boomer generation. The second smaller bulge below – from ages 10 to 24 – represents the baby boom echo.

As one works their way up the population pyramid to the older age cohorts, the longer life expectancy amongst females becomes more pronounced. In all cohorts above age 75, the female population is significantly greater than the male population.

Figure 9: 2006 Population Pyramid for Maple Ridge

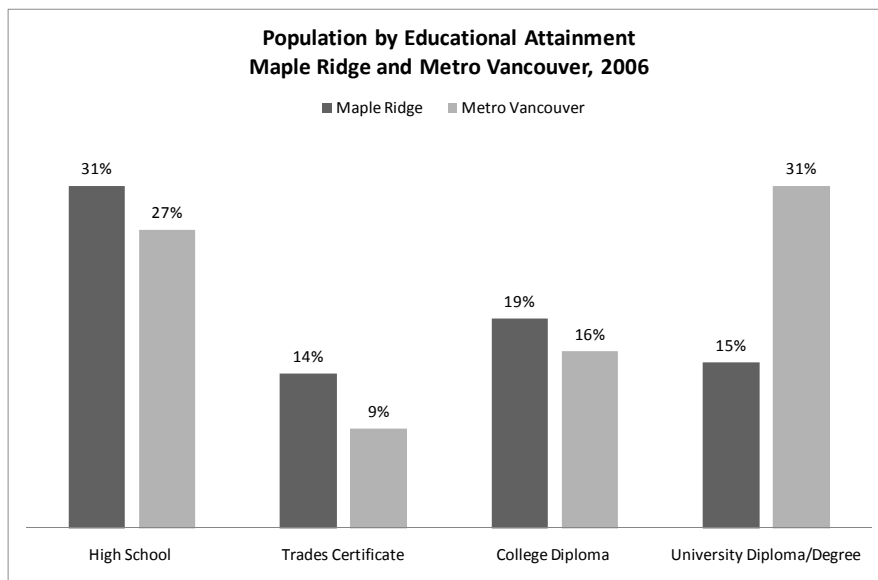


4.3 EDUCATIONAL ATTAINMENT

As of 2006, 80% of Maple Ridge residents had some form of educational certificate, diploma or degree. While this figure is below the Metro Vancouver rate of educational attainment (83%), it is higher than the City of Langley (77%), the District of Mission (75%) and the City of Abbotsford (74%).

In the categories of trades and college educational attainment, Maple Ridge has a higher rate of diploma and certificate completion than the Metro Region. In terms of trades, 14% of Maple Ridge residents in 2006 possessed a certificate or diploma. At the college level, 19% of Maple Ridge residents possessed a diploma. Only at the level of university diploma, certificate and degree attainment is there a large differential between Maple Ridge (15%) and Metro Vancouver (31%).

Figure 10: Population by Educational Attainment



5.0 POPULATION GROWTH AND DISTRIBUTION

The key factors shaping housing demand in the coming years will be population growth, (driven both by natural increase and net migration), changing age structure of the population, declining average household sizes and considerations of amenities and affordability. Constraints to growth include land capacity, transportation, location of jobs and environmental considerations.

5.1 POPULATION GROWTH

Rates of population growth in Maple Ridge have been relatively strong since the 1980s, owing largely to net inflows of migrants. The population has aged at approximately the same rate as the province on whole, adding 7.3 years to its median age since the mid 1980s. However, in 2008 Maple Ridge residents were nearly two years younger than the provincial population.

5.1.1 *Components of Growth*

Population growth in the Maple Ridge area will be driven by **natural increase** and **net migration** in the coming years, with the former playing a decreasing role.

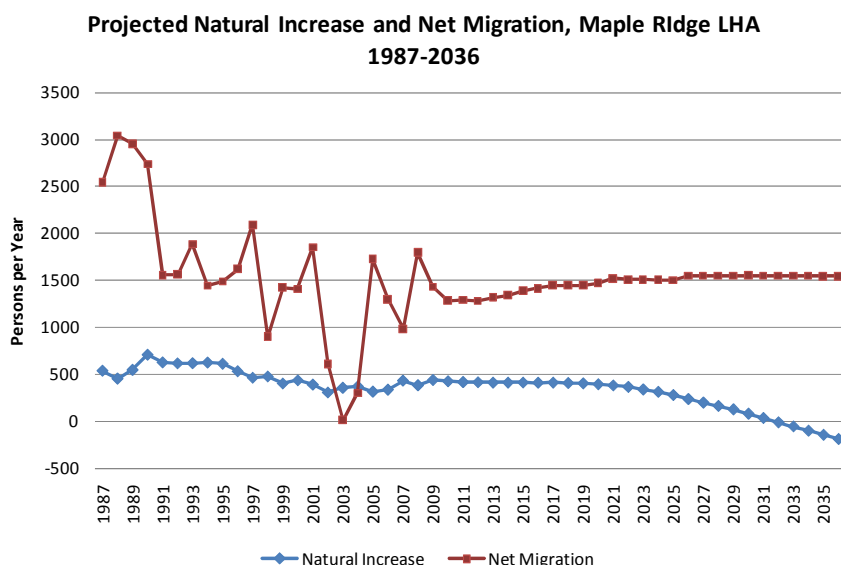
Natural increase is the difference between the number of births and death, and is in part a function of the population's age structure.

Net migration is the amount by which migrant inflows exceed migrant outflows. Net migration is influenced by factors such as: cost of living, employment opportunities, lifestyle considerations; it takes into account migrants at the provincial, national and international levels.

Natural Increase: BC Stats Population Projections (PEOPLE 34) for the Maple Ridge LHA indicate that natural increase will remain positive and contribute a steadily decreasing proportion of growth to 2031 (Figure 11). Natural Increase for Metro Vancouver is projected to remain positive (but declining) until 2033.

Net Migration: As with the entire Metro region, net migration is expected to play an increasingly important role in long-term growth of Maple Ridge. Positive and steadily increasing net migration is expected.

Figure 11: Historic and Projected Natural Increase and Net Migration, Maple Ridge LHA



Source: BC Stats PEOPLE 34

5.1.2 Population Projections

Population projections for Maple Ridge are based upon two data sources: the Metro Vancouver Draft Regional Growth Strategy (2009) and BC Stats PEOPLE 34 population projections (2009).⁸ The latter forecasts the population of the Maple Ridge Local Health Area (LHA) to 2036 and the former provides ‘snapshot’ population figures in 2006, 2021, 2031 and 2041 for the two municipalities within that LHA: the City of Pitt Meadows and the District of Maple Ridge.⁹

GPRA provides two population growth scenarios for Maple Ridge. The first projection scenario takes as a starting point the BC Stats PEOPLE 34 forecast for the Maple Ridge LHA to 2036 and factors out the District of Maple Ridge based on data from Metro Vancouver. For the period 2037 to 2041 (for which there is no current BC Stats forecast), GPRA has projected LHA growth at an average annual rate of 1.19%.¹⁰ The second projection scenario does not use BC Stats’ PEOPLE 34; rather, population forecasts for the District of Maple Ridge in 2021, 2031 and 2041 appearing in the Metro Vancouver Draft Regional Growth Strategy (RGS) are used and all years between are interpolated.

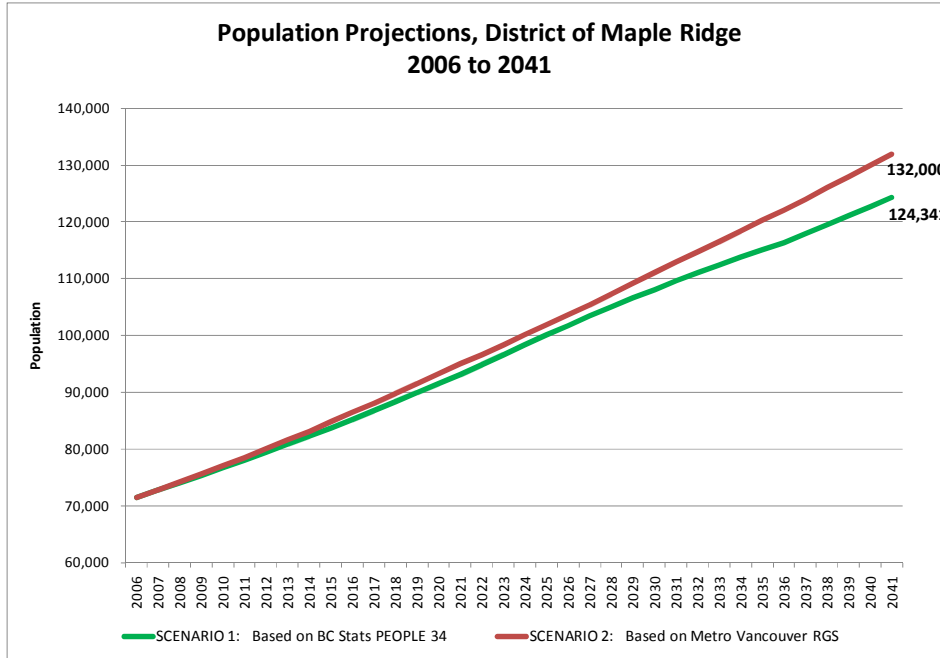
⁸ The PEOPLE 34 projection is based on an age cohort survival model and includes a model of net migration to the LHA. It provides a breakdown of population by 5-year age cohort, showing changing age composition to 2036. The projection takes into account the new Golden Ears Bridge and the upgraded Pitt River Bridge. As was noted by the Sheltair Group in their 2004 Housing Projection Study for Maple Ridge, BC Stats’ PEOPLE forecasts have a “sound and defensible” methodology.

⁹ Includes Maple Ridge, Pitt Meadows and Indian reserves

¹⁰ The average annual growth rate of 1.19% used to forecast LHA population from 2037 to 2041 is the 10-year average growth rate for the LHA from 2026 to 2036.

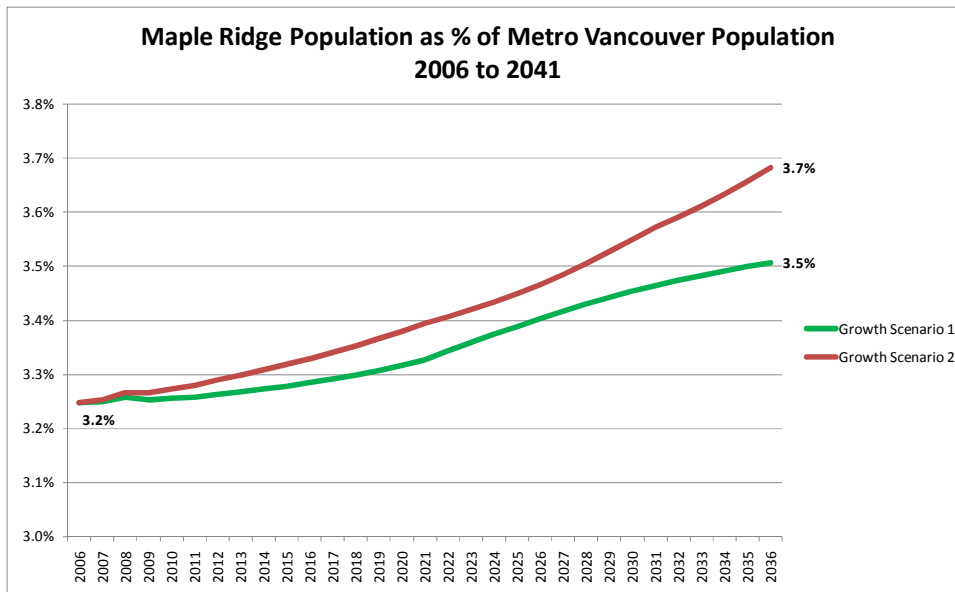
Figure 12 below illustrates these two population forecast scenarios to 2041. Under scenario 1, Maple Ridge is projected to have a population of just over 124,000 by 2041, while under scenario 2 Maple Ridge is projected to reach 132,000 residents by 2041.

Figure 12: Population Projections, District of Maple Ridge, 2006 to 2041



The following figure shows Maple Ridge's relative contribution to Metro Vancouver's population base under each forecast scenario.

Figure 13: Share of Metro Vancouver Population, 2006 to 2041



It should be noted that both forecasts use a 2006 base year population figure for Maple Ridge of 71,420 rather than the 2006 Census figure of 68,950 appearing in section 4.1. The figure from BC Stats adjusts for Census undercount, is considered a more accurate baseline figure, and is therefore used as a baseline for projections.

The table below summarizes the two population forecast scenarios.

Table 4: District of Maple Ridge Population Projections and Share of Metro Vancouver Population, 2006 to 2041

District of Maple Ridge Population Projections and Share of Metro Vancouver Population, 2006 to 2041				
	Maple Ridge Population Projections		M.R. Pop as % of Metro Van	
	Scenario 1*	Scenario 2**	Scenario 1	Scenario 2
2006	71,420	71,420	3.2%	3.2%
2011	78,016	78,545	3.3%	3.3%
2016	85,222	86,382	3.3%	3.3%
2021	93,093	95,000	3.3%	3.4%
2026	101,725	103,610	3.4%	3.5%
2031	109,580	113,000	3.5%	3.6%
2036	116,325	122,131	3.5%	3.7%
2041	124,341	132,000	n/a	n/a
2006-2041	52,900	60,600		
*Based on BC Stats PEOPLE 34				
**Based on Draft Metro Vancouver Regional Growth Strategy (2009)				

As indicated above, Maple Ridge is projected to add between 52,900 and 60,600 residents over 35 years. This represents a population increase of 74% to 85%, or average annual growth rates of between 1.6% and 1.8%. Under both scenarios Maple Ridge is expected to grow faster than the Region on average.

The 100,000 residents mark is significant for Maple Ridge given Official Community Plan Policy 3-24:

Urban development will not be supported in the Thornhill Urban Reserve Area until the population threshold exceeds 100,000 people for the District and the residential capacity within the existing urban area is approaching build-out.

Under growth scenario 1, Maple Ridge would surpass the 100,000 population threshold between 2024 and 2025. Under the more aggressive scenario 2, the threshold would be surpassed between 2023 and 2024.

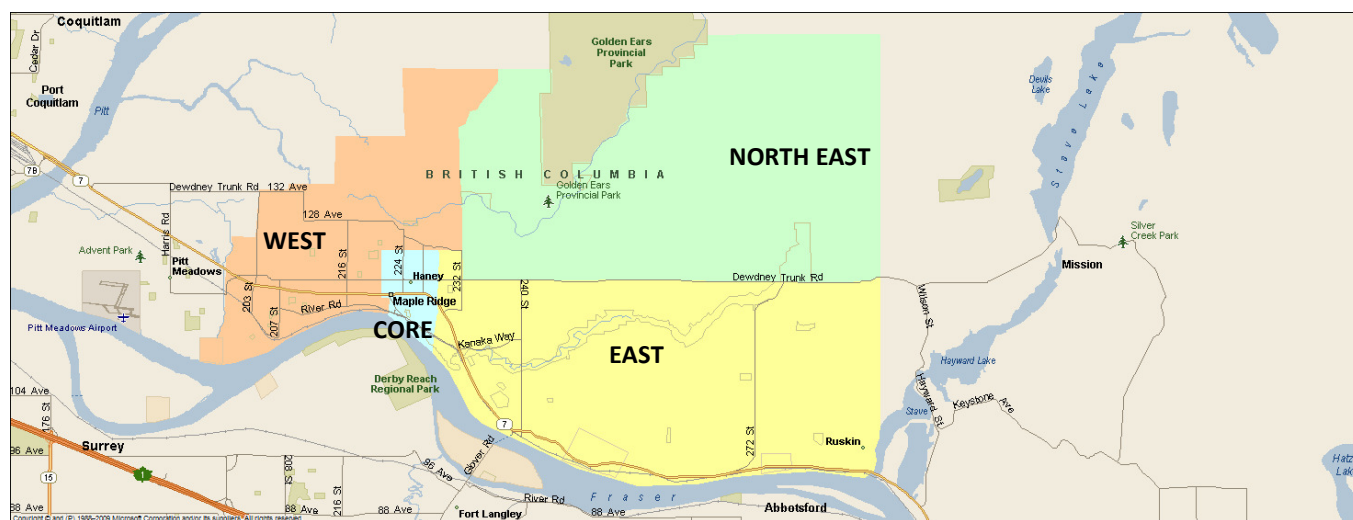
For the purposes of all forecasting work presented in subsequent sections of this report, GPRA has elected to apply the more conservative **population growth scenario 1** based on BC Stats PEOPLE 34 forecast.

5.2 DISTRIBUTION OF POPULATION GROWTH

Population growth has been forecast for 4 geographic sub-regions of Maple Ridge delineated by GPRA: the West, the Core, the East and the North East. Traffic zone data was aggregated to correspond to each of these sub-regions for population forecasting. Sub-Region boundaries are as follows:

- West:** Bounded by the municipal boundary with Pitt Meadows in the west and north, 232nd street and Silver Valley Road in the east, and 124th Avenue and the Fraser River in the south.
- Core:** Bounded by 221st Street in the west, 124th Avenue in the north, Burnett Street in the east and the Fraser River to the south. Note that these do not exactly conform to Town Centre boundaries.¹¹
- East:** Bounded in the west by Burnett and Greenwell streets, in the north by Abernethy Way and Dewdney Trunk Road, in the east by Mission, and in the south by the Fraser River.
- North East:** Bounded in the west by 232nd Street and Silver Valley Road, in the north and east by Golden Ears Provincial Park and the District of Mission, and in the south by Dewdney Trunk Road and Abernethy Way.

Figure 14: Maple Ridge Forecast Sub-Regions



¹¹ The Town Centre is bounded by 124th Avenue, Lee Avenue and 123rd Avenue in the north, Greenwell and Burnett Streets in the east, the Fraser River in the south, and 221st, Dunbar and Delcrest Streets in the east.

Table 5 outlines the anticipated population distribution and growth of each sub-region, based on population forecast scenario 1 in section 6.1 and Traffic Zone growth distribution forecasts from the District of Maple Ridge.

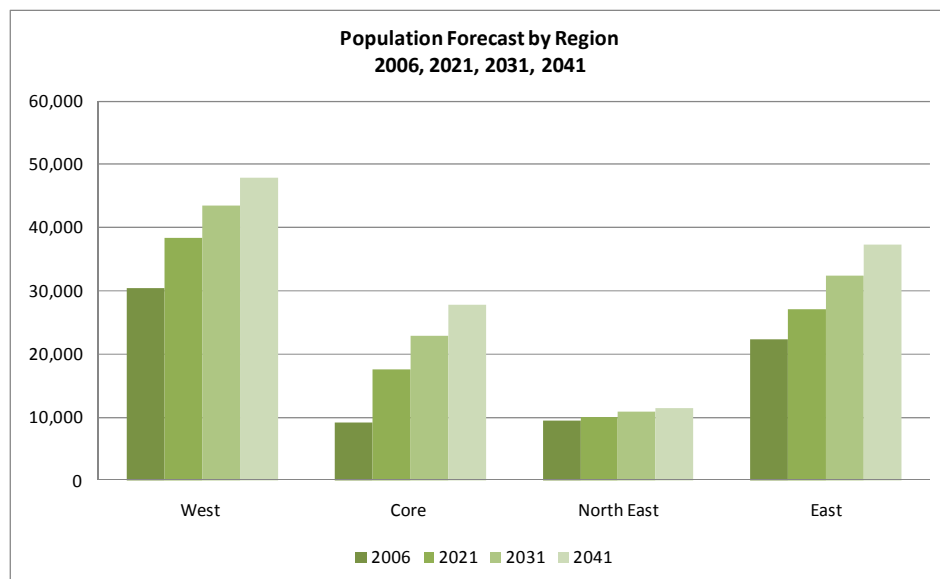
Table 5: District of Maple Ridge Population Projections by Sub-Region, 2006 to 2041

Forecast Population Distribution, 2006-2041					
	2006	2021	2031	2041	35 yr growth %
West	30,375	38,407	43,479	47,844	58%
Core	9,233	17,533	22,836	27,807	201%
North East	9,538	10,076	10,829	11,400	20%
East	22,275	27,077	32,436	37,290	67%
Total	71,420	93,093	109,580	124,341	74%

Source: District of Maple Ridge, BC Stats, Metro Vancouver

The west sub-region contained 43% of the District's population in 2006. Most of that population is concentrated in the south-west 'Lougheed Corridor' while fewer than 500 people resided in the portion of the Silver Valley Area Plan that falls within this region. The west is expected to add nearly 17,500 residents between 2006 and 2041, an additional 500 residents per year on average for an annual growth rate of 1.3%.

Figure 15: Maple Ridge Population Forecast by Sub-Region: 2006, 2021, 2031, 2041

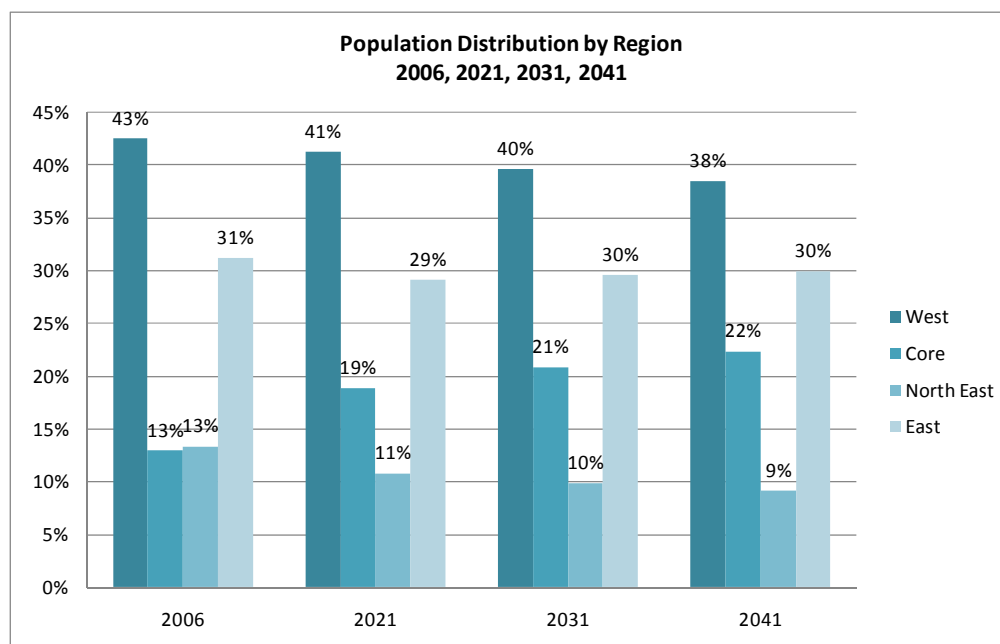


While the west's absolute population is forecast to rise steadily as shown in both Table 5 and Figure 15, its relative contribution to the District total is expected to decline (Figure 16). Its 43% share of District population in 2006 is forecast to fall to 41% by 2021, 40% by 2031 and 38% by 2041.

The Core is targeted as a growth area by both Metro Vancouver and the District of Maple Ridge. The intent is to facilitate an overall increase in commercial, residential and office densities, a fine-grain mix of development densities and land uses, and by way of the above create a municipal core that is vibrant and inviting at all times of day and night. The growth forecast calls for a 200% increase in Core area population over 35 years, reaching nearly 28,000 residents by 2041. To achieve this goal, growth will have to be sustained at an average annual rate of 3.2%.

With an anticipated rate of growth at double that of the District as a whole, the core is slated to significantly increase its share of municipal population. In 2006, the core area's 9,200 residents accounted for only 13% of the District total. By 2021, the core is expected to account for 19% of the total population; it is expected to reach 21% by 2031 and 22% by 2041.

Figure 16: Maple Ridge Population Distribution by Sub-Region: 2006, 2021, 2031, 2041



In the eastern sub-region, population is primarily concentrated in the urban areas between Burnett and 240th Streets, along with the Albion Area. It also contains the Thornhill urban reserve and areas of rural residential near the District of Mission. The 2006 eastern sub-region population was nearly 22,300. By 2041 it is expected to reach 37,300, a 67% increase in 35 years.

The east's relative share of Maple Ridge population will remain quite steady. In 2006 it accounted for 31%; it is expected to be 29%, 30% and 30% in 2021, 2031 and 2041 respectively.

The north-east sub-region includes suburban residential areas between Dewdney Trunk Road and 128th Avenue, as well as a portion of the Silver Valley Area. The north-east is expected to grow modestly, adding less than 2,000 residents over 35 years. By 2041 the population of the region is projected to be 11,400.

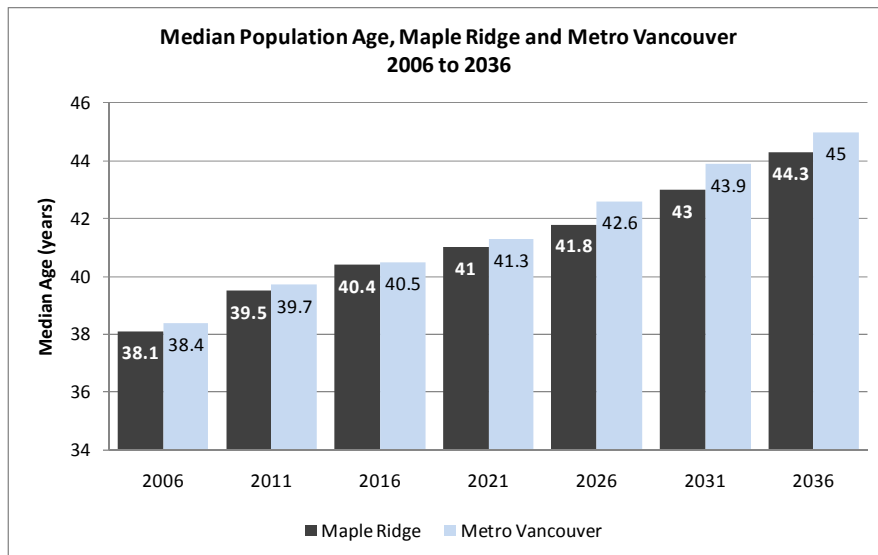
The north-east accounted for 13% of the District's population in 2006. This will drop to 11% by 2021, 10% by 2031 and 9% by 2041.

By 2041, Maple Ridge is expected to have over 60% of its population located west of 232nd Street.

5.3 AGING POPULATION

The District of Maple Ridge, like the rest of Metro Vancouver, is getting older. In 2006 the average age of a Maple Ridge resident was 38.1 years. By 2016, this figure will increase to 40.4 years. And by 2036, the average District resident will be 44.3 years old. Maple Ridge is younger overall than the Metro region as a whole, and is expected to remain so into the future (Figure 17).

Figure 17: Median Age, Maple Ridge and Metro Vancouver, 2006 to 2036



The progressive growth and aging of the Maple Ridge population is illustrated by the sequence of population pyramids on the following page.

Figure 18: Population Pyramids for Maple Ridge: 2016, 2026, 2036

Over the coming decades, the populations of both Maple Ridge and Metro Vancouver will decrease their overall share of residents aged 19 and under. Whereas this group represented 27% and 22% of the population in Maple Ridge and Metro Vancouver respectively in 2006, by 2036 these figures are forecast to reach 21% and 19%. This trend will also be the case for the 35 to 44 and 45 to 54 cohorts.

Within the seniors age cohorts (age 65+) percent share of total population in Maple Ridge and Metro Vancouver will increase significantly. This is also the case for the 20 to 34 cohort.

Figure 19: Percent of Population by Age Group, Maple Ridge and Metro Vancouver, 2006 and 2036

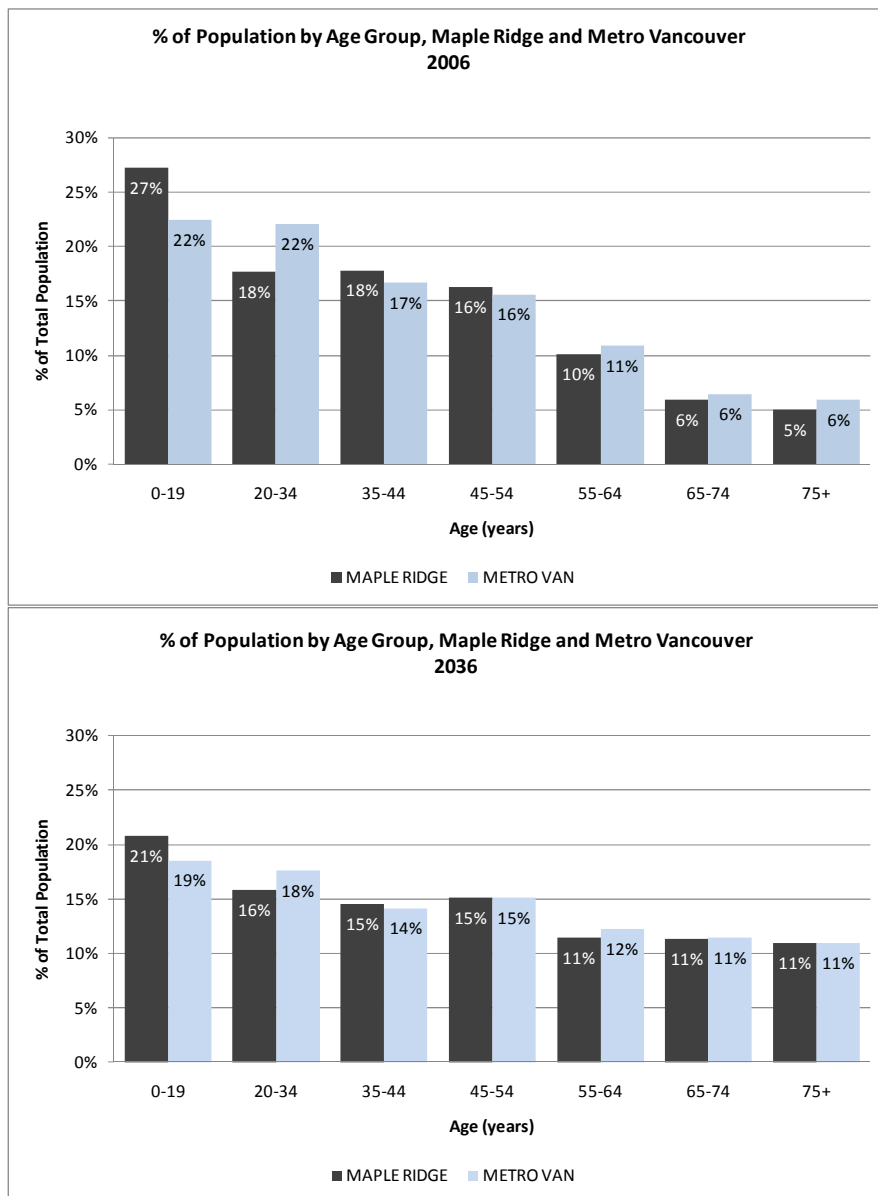
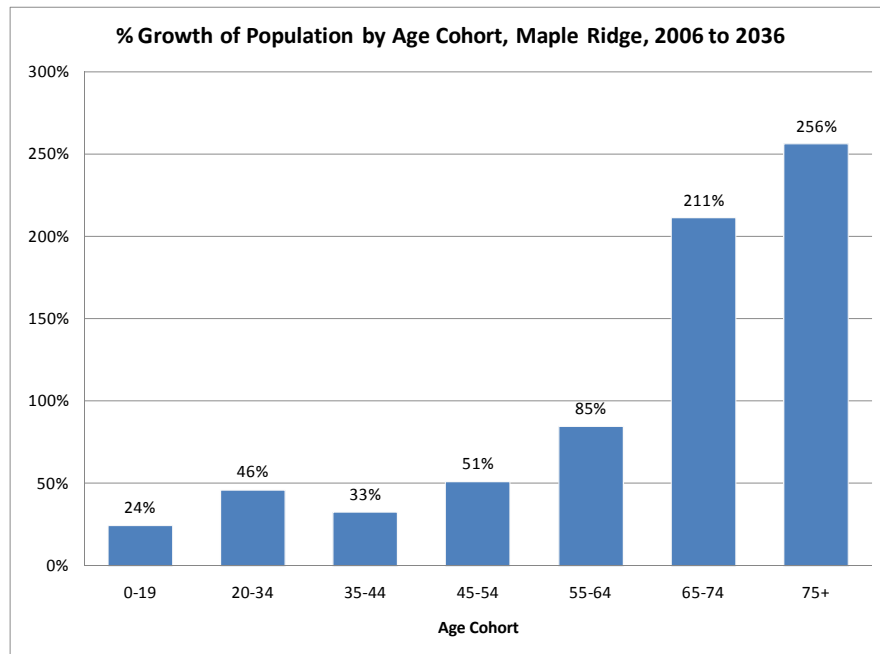


Table 6 and Figure 20 show the rate of growth that each age cohort is expected to undergo from 2006 to 2036. The seniors cohorts (65-74 and 75+) are each expected to grow by over 210%, or between 3.9% and 4.3% per year for 30 years.

Table 6: Population by Age Group, Maple Ridge, 2006 to 2036

	0-19	20-34	35-44	45-54	55-64	65-74	75+
2006	19,428	12,595	12,724	11,640	7,208	4,241	3,585
2011	18,982	15,226	11,893	13,381	9,294	5,043	4,198
2016	19,001	17,394	11,762	13,698	11,526	6,862	4,979
2021	20,289	17,939	13,454	13,027	13,369	8,935	6,079
2026	22,140	17,492	16,046	13,129	13,840	11,120	7,958
2031	23,513	17,407	17,396	14,975	13,269	12,860	10,161
2036	24,181	18,401	16,897	17,578	13,308	13,197	12,763
% Change 06-36	24%	46%	33%	51%	85%	211%	256%

Figure 20: % Growth of Population by Age Cohort, Maple Ridge, 2006 to 2036



5.4 CONCLUSIONS AND IMPLICATIONS FOR THE ALBION FLATS

The combined factors of population growth (63% from 2006 to 2036 and 74% from 2006 to 2041), population concentration (201% forecast growth in the core) and population aging (significant growth of the 55+ cohorts) will have a number of implications for the way the District will develop.

- Older population cohorts (65+) by and large have a greater propensity to seek smaller residential units, and place a greater emphasis on walkability, proximity to amenities like shops and community centres, and proximity to transit in their housing location decisions;
- While dwelling ownership rates tend to increase with age, this trend generally reverses after the age of 75. Maple Ridge is forecast to increase its 75+ population base by 256% over 30 years. More people aged 75+ will create increased demand for rental units;
- With the population forecast to pass 100,000 between 2024 and 2025, and the associated opening of the Urban Reserve for urban development, decisions will have to be made regarding desired patterns and densities of development;
- A greater reliance on transit and nearby services;
- The Albion Flats offer a number of elements that make it a potentially attractive area for housing a growing and aging population:
 - Easy access along Lougheed Highway to the Town Centre, which itself will become more urbanized in the coming years and therefore more of a service and hospitality 'hub';
 - Recreational amenities;
 - Proximity to single family urban area to the north and an urban area to the east which is designated for more medium density residential development (with associated implications of greater critical mass for transit and commercial amenities).
- The Albion Flats could be a good location for mixed-intensity residential (small single family, duplexes/town-homes, low rise apartments over commercial), and other uses including neighbourhood-serving commercial and office/flex space.

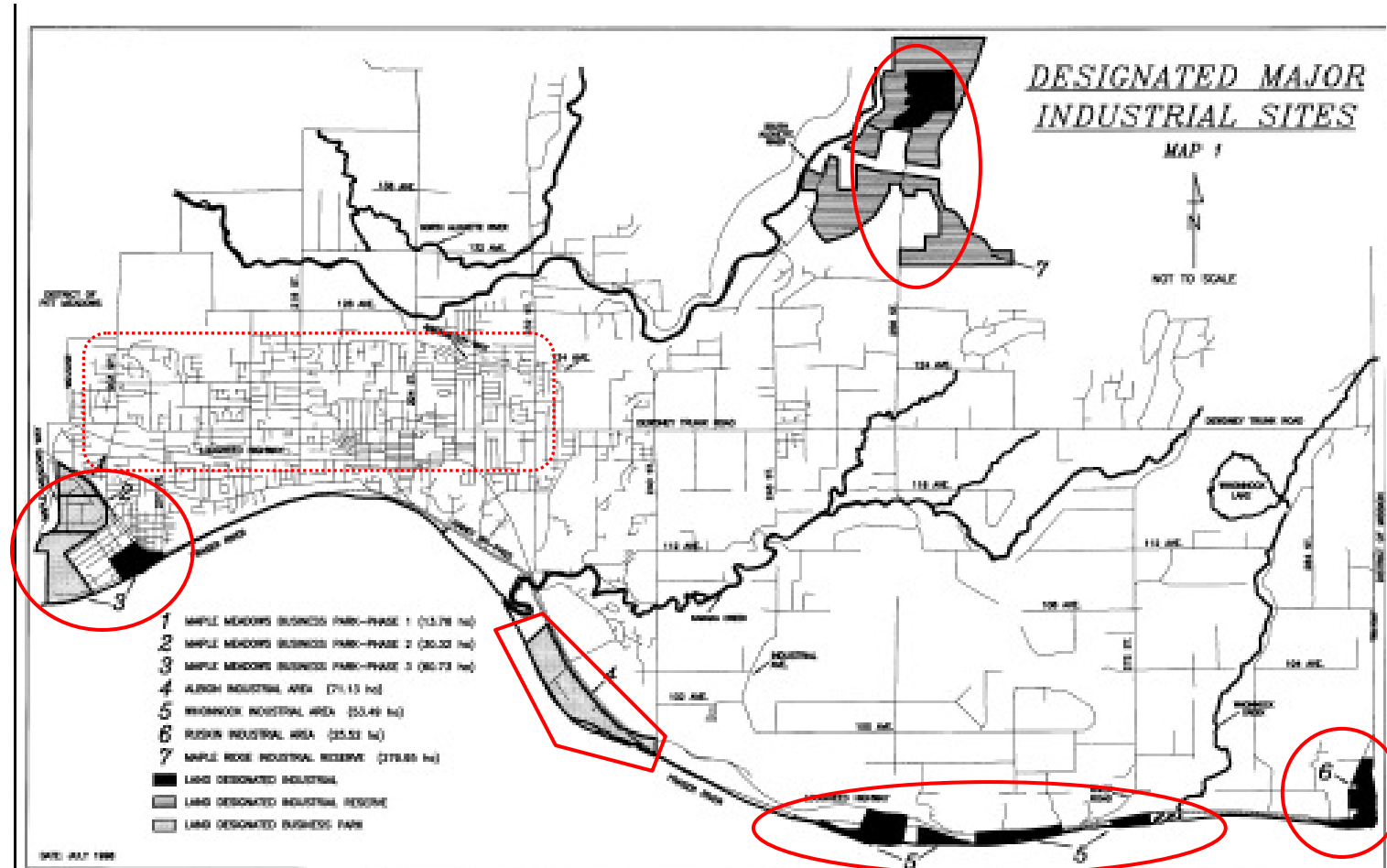
However, there are a number of constraints that limit the potential for residential development on the Albion Flats:

- Residential development at Albion Flats is contrary to the OCP development pattern;
- The Albion Flats are designated "Agricultural Lands in the Green Zone" in the Metro Vancouver Livable Region Strategic Plan, and an Agricultural Area within the Draft Metro Vancouver Regional Growth Strategy (2009).
- Most of the Albion Flats are within the Agricultural Land Reserve.
- Lack of local transit service, either bus or West Coast Express
- Lack of cultural facilities or professional services (located in Town Centre)
- Located with the flood plain

6.0 INDUSTRIAL INVENTORY AND TRENDS

6.1 INDUSTRIAL LAND BASE

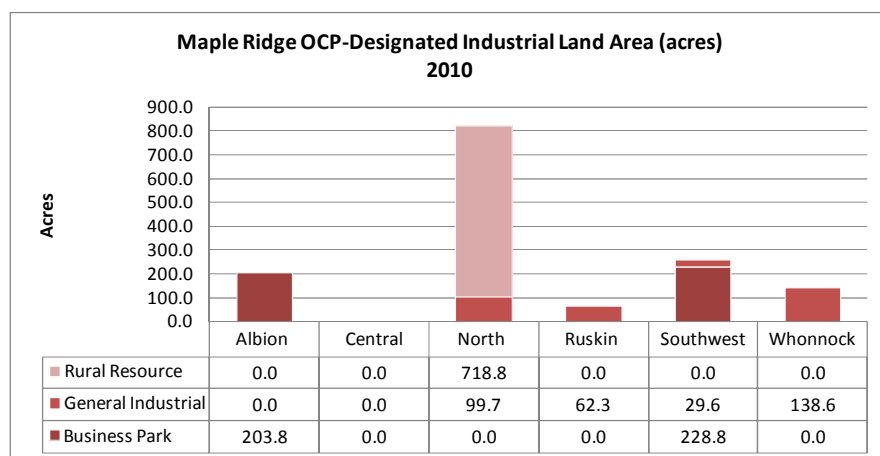
Existing industrial areas and lands available for future industrial development are located in six industrial areas: Northern Maple Ridge, Southwest, Albion, Whonnock, Ruskin and small sites throughout Central Maple Ridge.



6.1.1 Designated Industrial Areas

The District's OCP designates 1,481 acres of land for industrial uses. Approximately 29% of this area (432 acres) is designated "Business Park", 22% (330 acres) is designated "General Industrial", and 48.5% (718 acres) is designated as "Rural Resource" and was formerly categorized as the Industrial Reserve. OCP-designated industrial lands are geographically distributed as follows:

Figure 21: Maple Ridge OCP-Designated Industrial Land Area, 2010

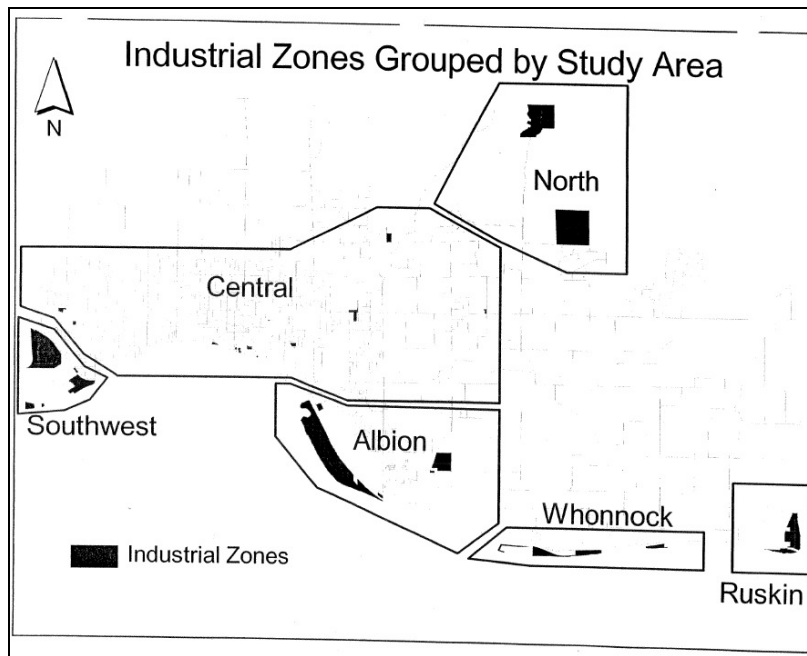
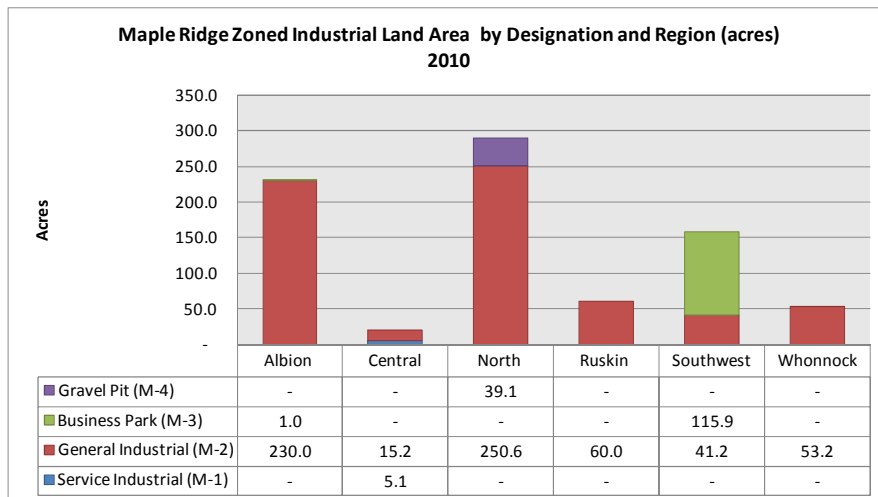


As shown in the figure above, 100% of the District's 'Rural Resource' area is located in the north. General industrial space is distributed primarily between Whonnock (42%) and the North (30%); Ruskin and the Southwest account for an additional 19% and 9% respectively. Business parks are located in two areas: Albion and the Southwest. The former contains 47% of designated area, with the latter accounting for 53%.

6.1.2 Zoning and Utilization

The vast majority of zoned industrial land (80%) is zoned "M-2" General Industrial. As noted in the 2003 Maple Ridge Industrial Development study, this zoning is reflective of the traditional character of most of the existing industry in Maple Ridge.

Aside from the 250+ acres of zoned industrial lands in the North, the majority of industrial space in Maple Ridge is located in the south and southwest in proximity to the Fraser River, railway lines and the Lougheed Highway.

Figure 22: Maple Ridge Industrial Zones**Figure 23: Maple Ridge Zoned Industrial Area by Designation and Region, 2010**

There are approximately 811 acres of zoned industrial land in Maple Ridge, distributed by zoning designation as follows:

- Service Industrial (M-1): 5.1 acres (0.6%)
- General Industrial (M-2): 650.3 acres (80.2%)
- Business Park (M-3): 116.9 acres (14.4%)
- Extraction Industrial (M-4): 39.1 acres (4.8%)

Geographically, zoned industrial areas are spread across six areas as indicated in Figures 22 and 23.

Albion

The Albion area contains 231 acres of zoned industrial land, comprising 28.5% of the District total. 230 acres are zoned M-2 (general industry) and 1 acre is zoned M-1 (business park).

While zoning designation indicates that Albion is mostly 'general industry', its OCP designation is Business Park. The implication is that its character and use is intended to be light industrial with some office and retail uses. There are 64 businesses active in the Albion industrial areas.

Of Albion's 231 acres of zoned industrial area, 81 acres or 35% are currently developed. A further 74 acres are underutilized and 75 acres are vacant.

Figure 24: Albion Industrial Areas



Central Maple Ridge

Central industrial areas are comprised of 20.3 acres throughout the urban portion of Maple Ridge, accounting for 2.5% of the District total. General Industrial (M-2) accounts for 15.2 acres and Service Industrial (M-1) makes up the balance.

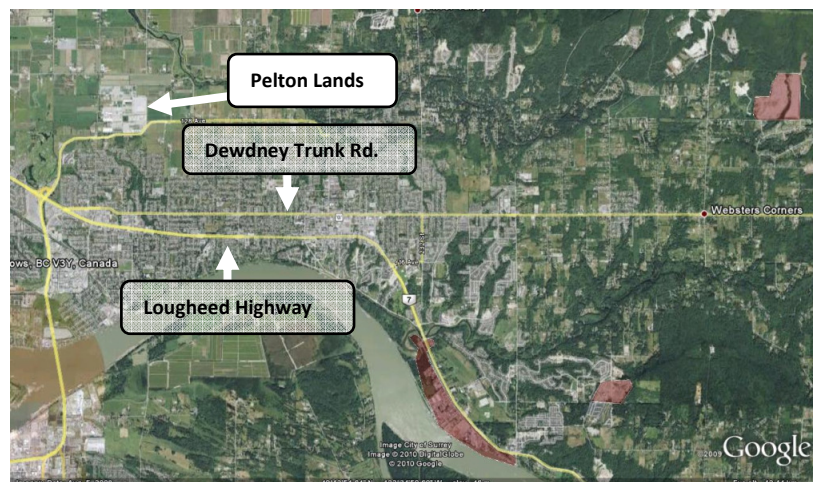
While zoned for industrial, none of these areas are designated for industrial use in the OCP. As a result, it is unlikely that industrial uses of these lands will continue in the future. The decline of industrial business use of these lands is evidenced by the number of industrial-type businesses located in the Central area. Whereas 11 businesses were present during an inventory in 2003, as of mid-year 2010 only 7 businesses remain.

Currently 14 acres or 71% of zoned industrial space in the Central area is developed. A further 2 acres (11%) are underutilized and 4 acres (17%) are vacant.

One notable development on the industrial front in Central Maple Ridge is the recent vote by Council to send the application for ALR exclusion of 147 acres of the Pelton lands (bounded by 203rd Street and 132nd Avenue) to the ALC. The Pelton family is proposing an industrial park for this site, while retaining 50 acres

within the ALR, but in non-farm uses. The proposal includes: an 8 acre community park, 6 acres for experimental or incubator farms, 5 acres for community gardens, 3 acres for an agri-product terminal, and 1 acre for horse trailer parking. An ALC ruling is expected in October or November of 2010.

Figure 25: Pelton Lands in relation to Central, Albion and North

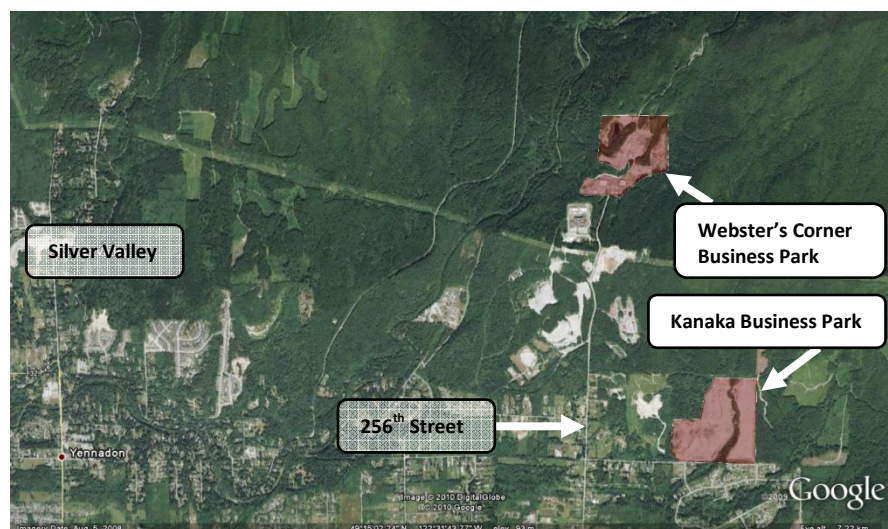


North Maple Ridge

The Northern industrial area is comprised of 290 zoned acres between Golden Ears Provincial Park to the west and the forested lands to the east. These lands account for nearly 36% of the District's total zoned industrial base. General Industrial (M-2) accounts for 251 acres and Gravel Pit (M-4) is 39 acres.

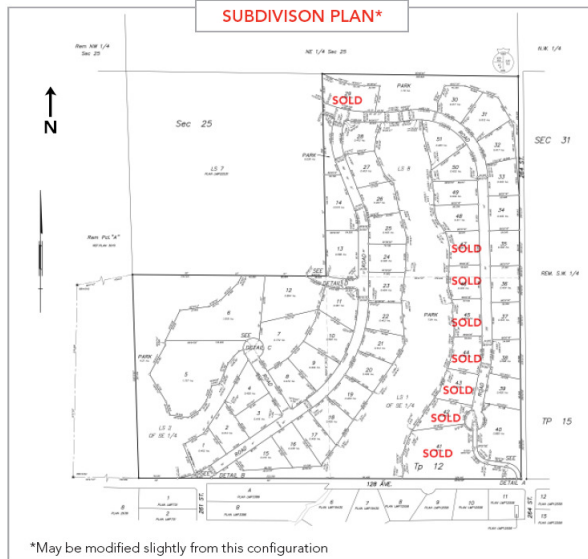
The majority of industrial land in the North is vacant (176 acres, 61%) or underutilized (99 acres, 34%). Only 15 acres were developed at mid-year 2010. While the North contains a large base of zoned industrial, the OCP designates most lands as Rural Resource. The long-term vision for growth in this area is therefore low-intensity industry and businesses.

Figure 26: Northern Industrial Areas



The two notable new business/industrial park projects in the District are both located in the North: Webster's Corner Business Park and Kanaka Business Park.

The **Kanaka Business Park** is located on 128th Avenue off 256th Street and constructed in a former gravel pit, Kanaka Business Park is Maple Ridge's newest



site for industrial lots. Lots began selling and leasing in October 2009. Issues of access are yet to be resolved; debate is ongoing between widening Dewdney Trunk Road to 256th Street or the more costly option of buying and expropriating property for extension of Abernethy Way to 256th Street. The site is being marketed based on the fast pace of population growth in Maple Ridge, and new

and improved road linkages including the Golden Ears Bridge, new Pitt River Bridge and Mary Hill Interchange.

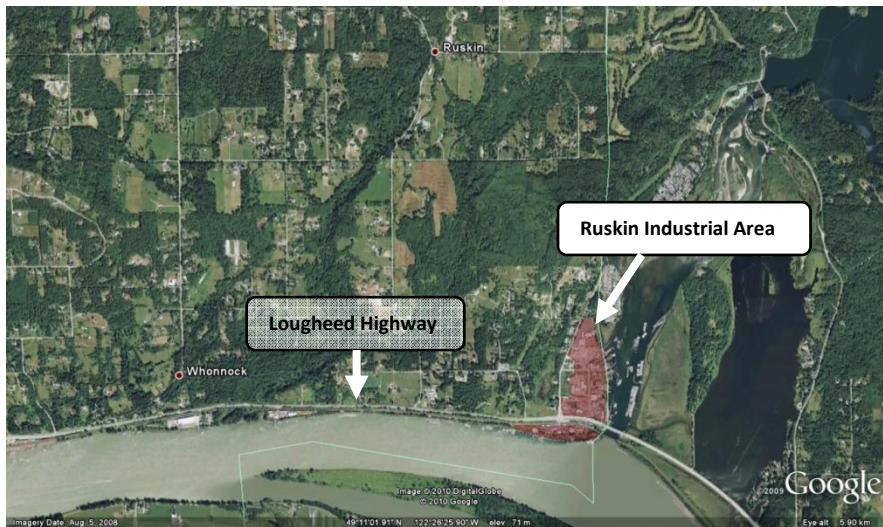
M-2 Zoning on site allows for a range of manufacturing, distribution, service and assembly uses. All lots are surveyed for septic fields, are provided with above-ground power, municipal water, gas telephone and cable. Leases are available on a minimum 5-year basis, and lot pricing ranges from \$590,000 to \$650,000 per acre. Half acre lots are available for \$390,000.

The **Webster's Corner Business Park** is located at the north end of 256th Street, The Park is approximately 90% occupied as of June 2010; key tenants include a large Cedar Mill, Surround Technologies manufacturer, and BC Hydro. The park is touted as being the "most affordable industrial land in the Lower Mainland."

Ruskin

The Ruskin industrial area is located in the southeast section of Maple Ridge along the Fraser and Stave Rivers. It houses primarily wood-related industrial sites. It is comprised of 60 acres of M-2 zoned land, accounting for 7.4% of the District's industrial base.

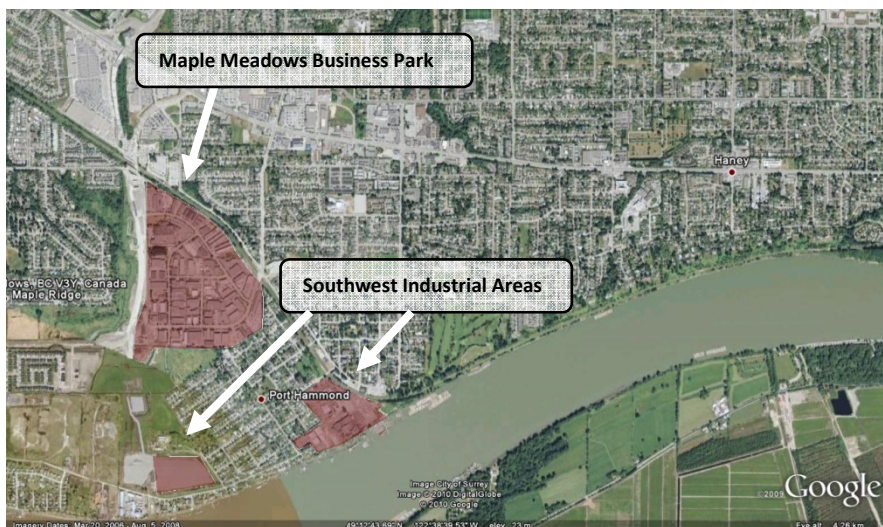
Ruskin is essentially built-out, with only 1 acre of vacant land noted in 2010.

Figure 27: Ruskin Industrial Area**Southwest**

The Southwest comprises 157 acres of zoned industrial lands, making up 19.4% of the District total. 116 acres are zoned Business Park (M-3), while the remaining 41.2 acres are zoned General Industrial (M-2).

Southwest Industrial lands are comprised of two distinct areas. The first, Maple Meadows Business Park, is the focal point of light industrial activity in Maple Ridge. It is zoned M-3. The second area has more traditional industrial activities (e.g. wood processing and shipyards) and is zoned M-2.

The Southwest is the most developed industrial area of Maple Ridge, with 0 acres underutilized and only 6 acres (4%) left vacant.

Figure 28: Southwest Maple Ridge Industrial Areas

Whonnock

The Whonnock Industrial Area is located along the Fraser River in southeast Maple Ridge, between the Langley Indian Band to the west and the Whonnock Indian Band to the east. The area is zoned M-2 and is comprised of 53.2 acres or 6.6% of the District's industrial land base.

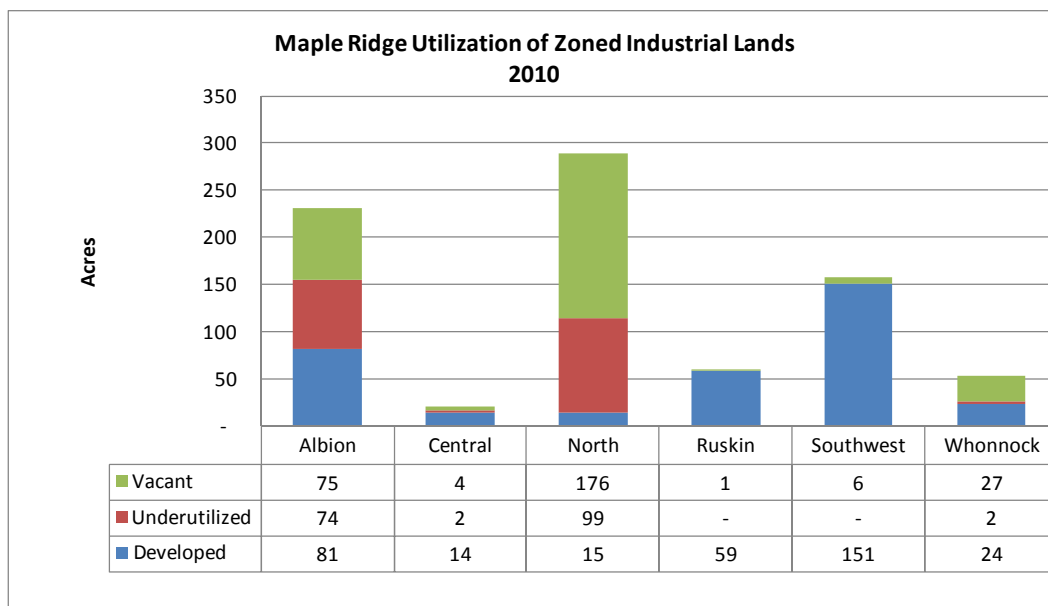
Utilization of Whonnock Industrial lands is 46% developed, 4% underutilized and 50% vacant. Business activities in this area include manufacturing, transportation and warehousing.

Figure 29: Whonnock Industrial Areas



The figure below provides a summary of Maple Ridge industrial land zoning and utilization by region.

Figure 30: Maple Ridge Industrial Land Utilization by Region, 2010



6.2 INDUSTRIAL EMPLOYMENT AND BUSINESSES

6.2.1 Employment

At mid-year 2010 there are an estimated 3,103 employees working at industrial-zoned lands in Maple Ridge. This represents 10% of the daytime working population of the District. Since 2003, the estimated number of employees at industrial areas has decreased by 117.

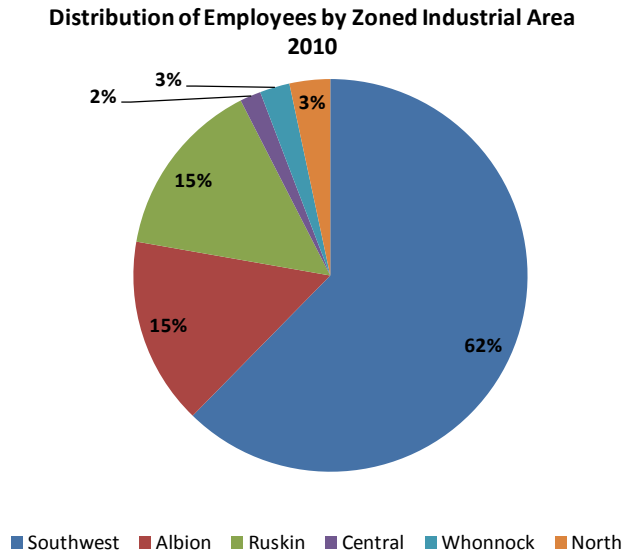
Industrial employees are primarily located in the southwest at the Maple Meadows Business Park; this park accounts for nearly 1,600 employees, or 62% of the industrial employee population. The remaining 980 employees are distributed across 5 areas: Albion (17%), Ruskin (12%), Central (2%), Whonnock (3%) and north (4%).

By far the majority of employees at industrial zoned lands work in the storage and warehousing industries (40%, 1,025 employees). A further 17.4% (445) are employed at sawmill facilities (again primarily in the southwest), while 19% (492) work in businesses at commercial strata lots. Other industries with notable numbers of employees include lumber remanufacturing (115, 4.5%), forestry (122, 4.8%), shingle mills (128, 5%) and automobile dealerships (32, 1.3%).

The following table shows the distribution of employees by industry type and geographic region. The majority of employees (62.5%) work at the industrial areas of southwest Maple Ridge, with an additional 30.1% employed at Albion and Ruskin.

Table 7: Employees in Zoned Industrial Areas

Number of Employees in Zoned Industrial Areas, Maple Ridge, 2010								
Industry	Southwest	Albion	Ruskin	Central	Whonnock	North	Total	%
AUTOMOBILE DEALERSHIP		32					32	1.0%
AUTOMOBILE PAINT SHOP, GARAGES, ETC.	8	3		1			12	0.4%
CEMENT PLANTS T.BBL/SHIFT			20				20	0.6%
CIVIC, INST. & RECREATIONAL - VACANT					9		9	0.3%
COMMERCIAL STRATA-LOT	481					22	503	16.2%
CONCRETE MIXING PLANTS TONS CAP.		11				4	15	0.5%
CONVENIENCE STORE/SERVICE STATION			21				21	0.7%
INDUSTRIAL - VACANT					1	11	12	0.4%
LUMBER REMANUFACTURING (WHEN SEPARATE FROM SAWMILL)		115					115	3.7%
LUMBER YARD OR BUILDING SUPPLIES		2					2	0.1%
METAL FABRICATING INDUSTRIES		7					7	0.2%
MISCELLANEOUS (FOREST AND ALLIED INDUSTRY)		10	132				142	4.6%
OFFICE BUILDING (PRIMARY USE)					16		16	0.5%
PLANER MILLS (WHEN SEPARATE FROM SAWMILL) M.FBM/8HR			22				22	0.7%
PRIMARY METAL INDUSTRIES (IRON, STEEL, PIPES ETC)	20						20	0.6%
RESIDENTIAL OUTBUILDING ONLY			125				125	4.0%
SAWMILLS M FBM/8HR	323	2	64		40	16	445	14.3%
SELF STORAGE	2			4			6	0.2%
SHINGLE MILLS SQUARES		65	73				138	4.4%
STORAGE & WAREHOUSING - CLOSED	1086	215		47	10	45	1,403	45.2%
STORAGE & WAREHOUSING - OPEN		17		1		6	24	0.8%
TRANSPORTATION EQUIPMENT IND. (AIRCRAFT, SHIPBUILDING)	14						14	0.5%
Total	1,934	479	457	53	76	104	3,103	100.0%
% Distribution by Area	62.3%	15.4%	14.7%	1.7%	2.4%	3.4%	100.0%	
# Employees Change since 2003	389	-372	-144	-64	20	54	-117	
Notes: # employees represents full time, part time, & professionals. Numbers supplied by business license applicant.								
Source: District of Maple Ridge								



6.2.2 Businesses and Floor Area

Maple Ridge has a diverse range of business activities taking place in industrial areas, from wholesaling and manufacturing to warehousing and forestry. In 2010, the District had 400 businesses located at industrial areas, representing 14% of Maple Ridge's 2,892 registered businesses.

Since 2003, the number of businesses located at Industrial areas has increased 72%, growing from 232 to 400. By comparison, the total number of businesses in Maple Ridge increased only 10%, growing from 2,622 to 2,892. Over 62% of business growth in Maple Ridge in the past 7 years has therefore occurred at industrial areas.

Albion

The Albion area contains 64 Industrial businesses, comprising 16% of the District total. Major businesses are storage and warehousing, with some lumber, forestry and manufacturing. The Albion industrial lands have added 3 new businesses since 2003.

Central Maple Ridge

Central Maple Ridge's industrial base has been reduced by 4 businesses since 2003 and currently stands at 7. Five of these businesses are in the storage and warehousing category, with the remainder split between self storage and auto shop. Industrial park development at the Pelton lands would change the landscape of industrial development in the Central region.

North Maple Ridge

The North has traditionally been home to extraction businesses, but as of 2010 the majority of businesses are categorized as commercial strata. There are 20

industrial businesses in the two Northern industrial areas, an increase of 17 since 2003.

Southwest

The southwest contains the vast majority of industrial businesses, totalling 287 or 72% of total. Uses are split primarily between commercial strata (at Maple Meadows Business Park) and Warehousing, with a half-dozen additional businesses distributed amongst self storage, sawmills, metal fabrication and automobile servicing.

The Southwest has added 148 businesses since 2003, a 94% increase over seven years.

Ruskin

The Ruskin industrial area has 17 businesses, an increase of 1 since 2003. Half of these businesses are shingle mills or forestry-related. There is also one sawmill, 2 planer mills and 3 convenience stores

Whonnock

The Whonnock area has 5 industrial businesses, an increase of 3 since 2003.

Table 8: Businesses Located in Maple Ridge Industrial Areas, by Industry and Region

Businesses Located in Maple Ridge Industrial Areas, 2010								
Industry	Southwest	Albion	Ruskin	Central	North	Whonnock	Total	%
AUTOMOBILE DEALERSHIP		1					1	0.25%
AUTOMOBILE PAINT SHOP, GARAGES, ETC.	2	2		1			5	1.25%
CEMENT PLANTS T.BBL/SHIFT			1				1	0.25%
CIVIC, INST. & RECREATIONAL - VACANT						1	1	0.25%
COMMERCIAL STRATA-LOT	168				12		180	45.00%
CONCRETE MIXING PLANTS TONS CAP.		1			1		2	0.50%
CONVENIENCE STORE/SERVICE STATION			3				3	0.75%
INDUSTRIAL - VACANT		1			3	1	5	1.25%
LUMBER REMANUFACTURING (WHEN SEPARATE FROM SAWMILL)		2					2	0.50%
LUMBER YARD OR BUILDING SUPPLIES		2					2	0.50%
METAL FABRICATING INDUSTRIES		1					1	0.25%
MISCELLANEOUS (FOREST AND ALLIED INDUSTRY)		1	4				5	1.25%
OFFICE BUILDING (PRIMARY USE)						1	1	0.25%
PLANER MILLS (WHEN SEPARATE FROM SAWMILL) M.FBM/8HR		1	2				3	0.75%
PRIMARY METAL INDUSTRIES (IRON, STEEL, PIPES ETC)	1						1	0.25%
RESIDENTIAL OUTBUILDING ONLY			2				2	0.50%
SAWMILLS M FBM/8HR	1	1	1		1	1	5	1.25%
SELF STORAGE	1			1			2	0.50%
SHINGLE MILLS SQUARES		4	4				8	2.00%
STORAGE & WAREHOUSING - CLOSED	113	40		4	2	1	160	40.00%
STORAGE & WAREHOUSING - OPEN		7		1	1		9	2.25%
TRANSPORTATION EQUIPMENT IND. (AIRCRAFT, SHIPBUILD)	1						1	0.25%
Total	287	64	17	7	20	5	400	100.00%
% Distribution by Area	71.75%	16.00%	4.25%	1.75%	5.00%	1.25%	100.00%	
# Businesses Change since 2003	148	3	1	-4	17	3	168	

Source: District of Maple Ridge

Overall the District of Maple Ridge has 2.2 million square feet of industrial floor area. Nearly 60% of this space, or 1.3 million square feet, is located in the southwest.

Table 9: Floor Area of Industrial Businesses by Industry and Region

Industrial Floor Area (sq.ft.), Maple Ridge, 2010								
Industry	Southwest	Albion	Ruskin	Central	Whonnock	North	Total	%
AUTOMOBILE DEALERSHIP		13,982					13,982	0.63%
AUTOMOBILE PAINT SHOP, GARAGES, ETC.	8,858	11,291		97			20,246	0.92%
CEMENT PLANTS T.BBL/SHIFT			7,104				7,104	0.32%
CIVIC, INST. & RECREATIONAL - VACANT					700		700	0.03%
COMMERCIAL STRATA-LOT	444,250					23,238	467,488	21.15%
CONCRETE MIXING PLANTS TONS CAP.		2,303				1,076	3,379	0.15%
CONVENIENCE STORE/SERVICE STATION			2,077				2,077	0.09%
INDUSTRIAL - VACANT						1,001	1,001	0.05%
LUMBER REMANUFACTURING (WHEN SEPARATE FROM SAWMILL)		116,788					116,788	5.28%
LUMBER YARD OR BUILDING SUPPLIES		9,752					9,752	0.44%
METAL FABRICATING INDUSTRIES		5,005					5,005	0.23%
MISCELLANEOUS (FOREST AND ALLIED INDUSTRY)		2,497	24,122				26,619	1.20%
OFFICE BUILDING (PRIMARY USE)					4,015		4,015	0.18%
PLANER MILLS (WHEN SEPARATE FROM SAWMILL) M.FBM/8HR		312	60,934				61,246	2.77%
PRIMARY METAL INDUSTRIES (IRON, STEEL, PIPES ETC)	69,998						69,998	3.17%
RESIDENTIAL OUTBUILDING ONLY			21,786				21,786	0.99%
SAWMILLS M FBM/8HR	17,771	1,001	17,997		87,005	1,507	125,281	5.67%
SELF STORAGE	49,051			46,812			95,863	4.34%
SHINGLE MILLS SQUARES		33,013	29,245				62,258	2.82%
STORAGE & WAREHOUSING - CLOSED	700,374	200,219		69,955	73,001	18,719	1,062,268	48.07%
STORAGE & WAREHOUSING - OPEN		8,988		11,507		3,595	24,090	1.09%
TRANSPORTATION EQUIPMENT IND. (AIRCRAFT, SHIPBUILDING)	8,999						8,999	0.41%
Total	1,299,301	405,151	163,265	128,371	164,721	49,136	2,209,945	100.00%
% Distribution by Area	58.79%	18.33%	7.39%	5.81%	7.45%	2.22%	100.00%	

Source: District of Maple Ridge

6.3 INDUSTRIAL TRENDS

As noted in Section 3.5, traditionally industry activity in Maple Ridge has been resource extraction and manufacturing based. The current and future market demand for industrial lands will be for **light industrial and business park uses**. Given the combined factors of projected population growth, a region-wide industrial shift eastward (due to land prices) and the new Golden Ears Bridge and Pitt River Bridges, Maple ridge is positioned to realize greater growth and diversification of its industrial base.

Across Metro Vancouver, the industrial market is expected to exhibit steady growth over the next year and beyond. With demand increasing and sublease availabilities stabilizing, the market is witnessing a measured introduction of new supply. Overall vacancy rates are anticipated to hold steady or dip modestly from a current 4.7% by year-end.

6.4 INDUSTRIAL LAND REQUIREMENTS IN MAPLE RIDGE

While no detailed industrial land requirement projections were conducted as part of this report, the following factors should be taken into consideration when undertaking future forecasts:

- While Maple Ridge does have an abundance of vacant and underutilized zoned industrial lands (289 acres and 178 acres respectively), the majority of this space is either peripherally located, non-contiguous or under-serviced:
 - Only 3% of all vacant zoned land is serviced; the balance is either partially serviced (29%) or non-serviced (68%).¹²
 - 0% of all underutilized zoned land is serviced; 18% is partially serviced and 82% is non-serviced.
 - Amongst the vacant and underutilized zoned industrial land base with at least partial servicing, there are **less than 5 acres located within a 10 minute drive of the Golden Ears or Pitt River Bridges.**
 - There are less than 100 acres of yet-to-be-zoned OCP-designated industrial lands (general industrial or Business Park) within a 10-minute drive of the two bridges.
- With the market primarily demanding light industrial and business park space, the key siting requirements will be proximity to transportation infrastructure, site services and overall site design and quality.

Given the above factors, combined with a population forecast calling for 41,000 new residents over 30 years and a relative dearth of industrial land base around the region, Maple Ridge will require additional business park/light industrial land base within 5-10 years.

6.5 CONCLUSIONS AND IMPLICATIONS FOR THE ALBION FLATS

The Albion Flats offers approximately 180 acres¹³ of potentially developable area with proximity to existing industrial zones, transportation infrastructure and possible servicing extensions.

- The intersection of 105th Avenue and Lougheed Highway, at the mid-point of the Albion Flats, is approximately 10 minutes by vehicle to the head of the Golden Ears Bridge;
- Available site contiguity at Albion is better than other industrial areas with similar accessibility profiles;

¹² Full service = water, sanitary and storm connections; Partial Service = water or sanitary or storm or combination of any 2 service connections; No Service = no connections.

¹³ This figure accounts for all stream setbacks on site. It does not account for other environmental constraints such as flood plain and, geotechnical issues, as outlined in the HB Lanarc *Albion Flats Environmental Baseline Report* (2010).

- Servicing could be extended over relatively short distance for light industrial users;
- It should be noted that until the Draft Metro Vancouver Regional Growth Strategy is adopted, the Albion Flats remain within the Green Zone of the Metro Vancouver Livable Region Strategic Plan and therefore an amendment would be required to re-designate a portion of the site to industrial use.

For Maple Ridge to attract light industrial and business park users to the District, it must offer sites that are comparable in location to what Pitt Meadows is offering in the South Harris Road area and along the Lougheed Corridor. Vacant industrial lands at the north end of 256th Street, limited lands in the Albion Industrial Park, and lands in the southwest are not sufficient.

If the Pelton lands are granted ALR exclusion and are developed as an industrial park, this would take industrial land pressure off the Albion Flats. However, as of now the Albion Flats remain a good option for industrial use.

7.0 COMMERCIAL INVENTORY AND TRENDS

Commercial land use in Maple Ridge is a complex issue. The District is supporting redevelopment in the Town Centre, while most of the new large format commercial development has occurred west of the centre along the Lougheed Highway. Even with all the new development along the Lougheed Highway there are many prominent retailers absent from the Maple Ridge / Pitt Meadows market.

As eastern Maple Ridge is currently underserved with retail, the Albion Flats is considered a potential location for a new retail project.

7.1 EXISTING INVENTORY

The District of Maple Ridge has compiled data on all commercial land uses within its boundaries. According to the District the total commercial space in Maple Ridge as of 2010 was almost 3.2 million square feet. The table on the following page highlights total retail in Maple Ridge by its format category, such as retail strip or shopping centre as well as by its location.

In total, data provided by the District indicates a current inventory of 3.2 million square feet of retail space. The total retail area includes retail space found in hotels, multi-family apartment blocks, storage and warehousing facilities, churches, schools, etc., as well as standard neighbourhood and community shopping centres. Some categories in which the District suggested might not accurately reflect retail area include 'stores with living quarters' and 'stores with offices' where the residential and office space might be included the commercial area calculation.

The table on the following page does not provide a detailed breakdown of space by retail category (i.e. clothing, footwear, electronics, personal services, etc.) in Maple Ridge, but it does provide an idea of the development format of the retail. Some of the highlights of this data include:

- The dominant two retail formats in Maple Ridge would be 'Shopping Centre - Community' and 'Store(s) and Service Commercial' that each account for approximately 17% of total retail with 558,000 and 560,000 square feet of retail space respectively.
- The only other format that registers over 10% of retail space is 'Neighbourhood Shopping Centres' which include 11% of Maple Ridges total retail space.
- 'Store(s) and Offices' is the next most common category accounting for almost 7% of the total retail space, with over 213,000 square feet.
- 'Commercial Strata Lots' account for approximately 276,000 square feet of retail space, or 5.5% of the total inventory.
- Commercial space defined as 'Retail Strip' accounts for 5.3% of the total inventory, or 171,000 square feet.

Some other notable locations for retail space include over 14,000 square feet of retail space in 'Churches and Bible Schools', only 1,001 square feet in 'Recreational / Cultural Buildings', 16,931 square feet in 'Community Hall, Lodge, Club, etc.', and almost 18,000 square feet of retail in 'Bowling Alley(s)'.

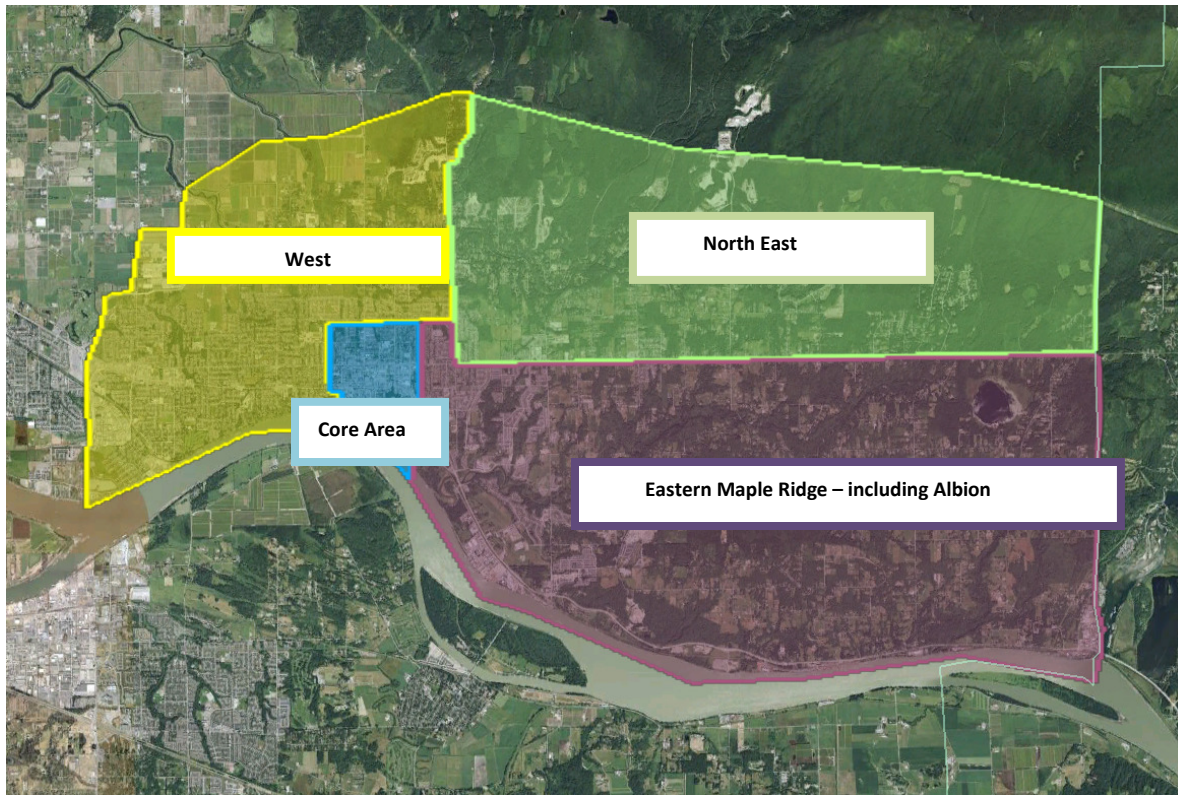
Table 10: Maple Ridge Commercial Floor Space by Area, 2010

Maple Ridge - Commercial Floorspace (sq.ft.) by Area, 2010									
Industry	Albion Area	Core Area	Dewdney Trk Lougheed	East Haney Cottonwood	East Maple Ridge	Hammond Area	Silver Valley	Grand Total	
2 ACRES OR MORE - SINGLE FAMILY DWELLING, DUPLEX				215				215	0.01%
AUTOMOBILE DEALERSHIP		3,606	36,523					40,129	1.26%
AUTOMOBILE PAINT SHOP, GARAGES, ETC.		46,027	90,612			2,110		138,749	4.34%
AUTOMOBILE SALES (LOT)			2,293					2,293	0.07%
BANK		41,397						41,397	1.30%
BIG BOX			25,446					25,446	0.80%
BOWLING ALLEY		17,997						17,997	0.56%
CHURCHES & BIBLE SCHOOLS			14,198					14,198	0.44%
COMMERCIAL STRATA-LOT		139,535	36,275					175,810	5.50%
CONVENIENCE STORE/SERVICE STATION		9,709	14,866	24,521	2,077			51,173	1.60%
DEPARTMENT STORE - STAND ALONE		8,710						8,710	0.27%
FAST FOOD RESTAURANTS		18,579	23,981					42,560	1.33%
HALL (COMMUNITY, LODGE, CLUB, ETC.)		16,931						16,931	0.53%
HOTEL			4,897					4,897	0.15%
LUMBER YARD OR BUILDING SUPPLIES		51,291	55,197					106,488	3.33%
MANUFACTURED HOME - (IN MANUFACTURED HOME PARK)			140					140	0.00%
MULTI-FAMILY APARTMENT BLOCK		5,921						5,921	0.19%
NEIGHBOURHOOD PUB		23,218	24,134		4,693	7,148	7,675	66,868	2.09%
NEIGHBOURHOOD STORE		9,612						9,612	0.30%
OFFICE BUILDING (PRIMARY USE)		159,051	9,967		990			170,008	5.32%
OTHER			81,106					81,106	2.54%
RECREATIONAL & CULTURAL BUILDINGS (ICE RINK, ETC)		1,001						1,001	0.03%
RESTAURANT ONLY		23,262	55,822					79,084	2.48%
RETAIL STRIP		113,538	57,822					171,360	5.36%
SCHOOLS & UNIVERSITIES, COLLEGES OR TRADE SCHOOLS		840						840	0.03%
SELF-SERVICE SERVICE STATION		2,002		1,292				3,294	0.10%
SERVICE STATION	8,526		6,996	442				15,964	0.50%
SHOPPING CENTRE - COMMUNITY		350,091	208,159					558,250	17.47%
SHOPPING CENTRE - NEIGHBOURHOOD		212,168	118,842	30,010				361,020	11.30%
SINGLE FAMILY DWELLING		205				958		1,163	0.04%
STORAGE & WAREHOUSING - CLOSED		35,284	6,997					42,281	1.32%
STORAGE & WAREHOUSING - OPEN	2,390	74,666	6,996	2,605				86,657	2.71%
STORE(S) AND LIVING QUARTERS	10,290		4,499	4,004	5,361	3,358	2,799	30,311	0.95%
STORE(S) AND OFFICES		199,630	10,172	3,735				213,537	6.68%
STORE(S) AND SERVICE - COMMERCIAL		362,782	191,468		3,788	2,799		560,837	17.55%
STORE(S) AND/OR OFFICES WITH APARTMENTS		37,728						37,728	1.18%
STRATA RENTAL APARTMENT - FRAME CONSTRUCTION		161						161	0.01%
STRATA-LOT RESIDENTIAL (CONDOMINIUM)		969						969	0.03%
VACANT		5,296	2,002			2,756		10,054	0.31%
Total	21,206	1,971,207	1,089,410	66,824	16,909	19,129	10,474	3,195,159	100.00%
	0.66%	61.69%	34.10%	2.09%	0.53%	0.60%	0.33%		

Source: District of Maple Ridge

One very enlightening component of this data is the picture it provides of how retail in Maple Ridge is geographically located. The map below displays the four major sub-regions of Maple Ridge as delineated by GPRA:

Figure 31: Four Geographic Sub-Regions of Maple Ridge



According to the table on the previous page over 95% of Maple Ridge's retail space is located in either the West (alternately termed the 'Lougheed Corridor') or the Core area. Therefore, Eastern and North-Eastern Maple Ridge currently have less than 5% of the District's total retail supply.

- Almost 62% of retail space is located in the Core Area.
- Just over 34% of retail space is located along the Dewdney Trunk Road / Lougheed Highway corridor.
- Less than 5% of retail space is located in Eastern Maple Ridge and the North-East (primarily in Silver Valley).

Compared to the location of retail, where 95% is located in the Lougheed Corridor or in the Town Core, only 61% of Maple Ridge's population lives in this area (see Table 5).

Based on 2006 population data, 39% of the Maple Ridge population was being served by less than 5% of the District's retail space, which implies that a large proportion of Maple Ridge's population is driving longer distances for daily retail needs.

Looking forward to 2041, the population breakdown by area will remain relatively similar, even with the policy of promoting population growth in the Town Core. With approximately 40% of the population residing in the East or

North-East, there will be significant demand for new retail options in these areas (see Table 5).

Employment distribution in Maple Ridge is currently more heavily weighted towards the Lougheed Corridor and the Town Core, with 73% of the employment in 2006.

Table 11: Forecast Employment Distribution, 2006, 2021, 2031, 2041.

Forecast Employment Distribution : 2006, 2021, 2031									
	2006		2021		2031		2041		35 yr growth
West	9,236	40%	12,549	37%	14,712	36%	16,875	35%	83%
Core Area	6,482	28%	12,046	36%	15,418	38%	18,790	39%	190%
Silver Valley	2,195	10%	3,436	10%	3,901	10%	4,365	9%	99%
East	5,091	22%	5,653	17%	6,608	16%	7,563	16%	49%
Total	23,004		33,684		40,639		47,593		107%
Source: District of Maple Ridge									

Over time, employment is expected to consolidate in the Core Area, with 39% of all Maple Ridge employment by 2041, but Silver Valley and East Maple Ridge are forecasted to retain roughly 25% of total employment by 2041. Such a large daytime working population will increase retail demand in the area.

While the OCP allows for increased retail development in Silver Valley and East Maple Ridge, which includes Albion, the current location of retail in Maple Ridge suggests a potential geographic imbalance. Retail uses such as personal services, convenience stores, and neighbourhood supermarkets are typically located in close proximity to residential uses.

This imbalance of retail in Maple Ridge is one important reason why developers are considering the Albion Flats as a location for a new retail project in order to have access to an underserved population base that is growing.

7.2 DESIGNATED COMMERCIAL LAND USE AREAS

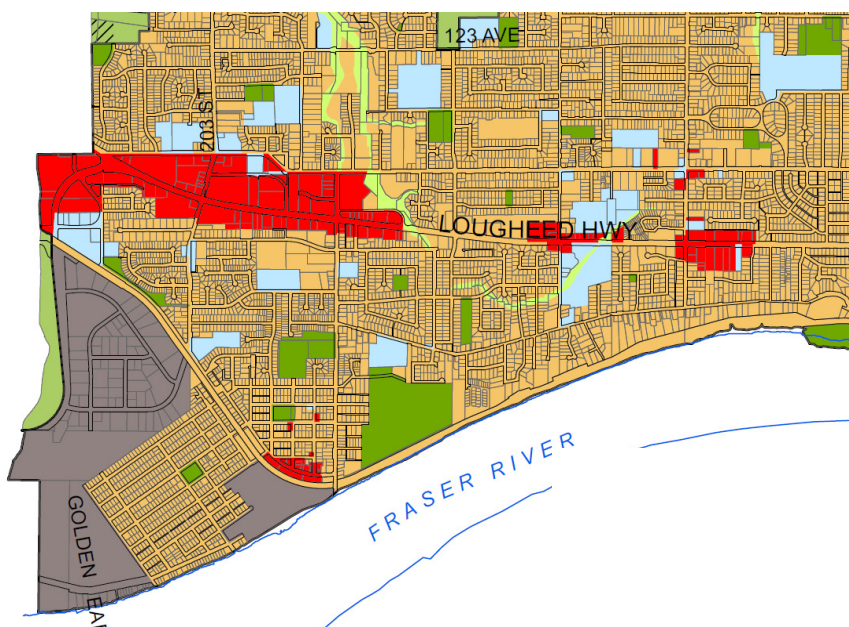
This section looks at the designated commercial land areas for the 4 areas of Maple Ridge.

7.2.1 Lougheed Highway / Dewdney Trunk Road Corridor (West)

According to the data provided by the District, this area accounts for approximately 34% of the total retail space in Maple Ridge.

The figure below is cut out of the Maple Ridge OCP, and the red area highlights lands that are designated for commercial retail use.

Figure 32: OCP-Designated Commercial Areas, Lougheed Corridor



Based on the OCP, this area has a total of 184.99 acres of land designated for commercial use, of which 177.38 acres is located on the Lougheed Highway / Dewdney Trunk Road.

The majority of the commercial land on the Lougheed Highway is designated as 'General Commercial' and is the location for the majority of large-format (big box) retail in Maple Ridge.

Significant tenants along the Lougheed Highway and Dewdney Trunk Road include: Rona, The Keg, Save-on-Foods, Safeway, Canadian Tire, and Staples.

Just across the municipal boundary in Pitt Meadows, is a large-format project that includes a Real Canadian Superstore, Winners, JYSK Linen, Home Sense, Sport Chek, Cineplex Odeon, Boston Pizza, Reitman's, Addition-Elle, Pier 1 Imports, and Michael's as well as other retailers.

In this study, the Hammond area is considered part of the Western Region, but the nature of its retail is very different. In the 2006 OCP Hammond is designated as Historic Retail and has only 7.61 acres of land designated for commercial use. Significant tenants in the area include a motorcycle shop, a tattoo parlour, and a neighbourhood pub. Even though Hammond has additional retail capacity, it is not envisioned to attract significant new retail investment and will likely continue to be predominantly neighbourhood serving.

The following table displays the utilization of commercial land in west Maple Ridge, including the Lougheed, Dewdney, and Hammond areas. Overall only 11 acres of commercial land remains vacant, and only 9 acres within the Lougheed corridor, which is not enough for a major new large-format project.

Table 12: Utilization of Zoned Commercial Lands, Lougheed, Dewdney, Hammond

Utilization of Zoned Commercial Land				
Commercial Area ¹	Developed	Vacant	Under-Utilized ²	Total Land Area
Lougheed / Dewdney Trunk	107.29	9.34	3.30	119.93
Hammond	3.71	1.72	0.79	6.22
Total	111.01	11.06	4.09	126.15
<i>% Distribution</i>	<i>88%</i>	<i>9%</i>	<i>3%</i>	<i>100%</i>
<p>1. Zoned Commercial Area is based on property areas, and does not equal OCP lands designated for commercial use, which includes roads and some sites not zoned commercial.</p> <p>2. Under-utilized sites were defined in the OCP as properties where the assessed value of improvements were less than 10% of the assessed value of the site.</p> <p><i>Source: District of Maple Ridge</i></p>				

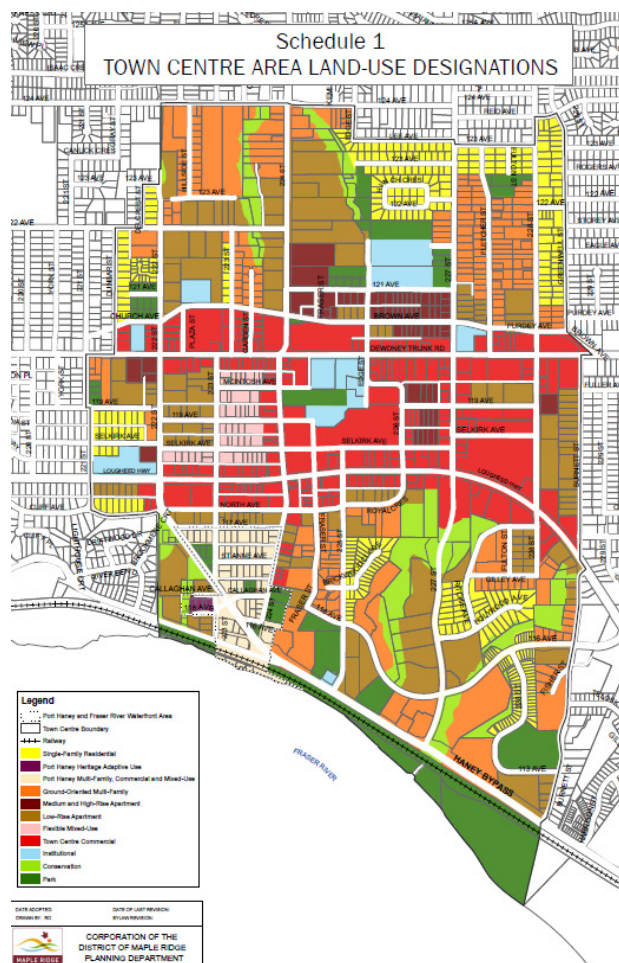
Assuming the roughly 9 acres of vacant commercial land on the Lougheed corridor was contiguous, it would only allow for approximately 110,000 square feet of new retail space (assuming the standard site coverage of 28%).

7.2.2 Maple Ridge Town Centre

According to District data, the Town Centre accounts for almost 62% of the total retail space in Maple Ridge, or 1.97 million square feet of retail.

The figure below from the OCP highlights the lands designated for commercial use in red:

Figure 33: OCP-Designated Commercial Areas, Town Centre



Based on the OCP, the Town Centre has a total of 195 acres of land designated for commercial use. (Note, this total includes sites not zoned commercial as well as roads).

The vast majority of the commercial land in the Town Centre, 159.3 acres or 82%, is designated as 'Town Centre Commercial', while the remaining commercial lands, are either designated as 'Port Haney Multi-Family, Commercial and Mixed Use', or 'Port Haney Heritage Adaptive Use', or as 'Flexible Mixed Use'.

From a retail standpoint, the Town Centre is anchored by the enclosed Haney Place Mall, which includes Zeller's, Marketplace Antique Mall, Reitman's, and Bootlegger.

Other shopping centres located in the Town Centre include Valley Fair Mall anchored by London Drugs, Red Robin and Save-on-Foods, and Maple Ridge Square which is anchored by Shoppers Drug Mart, and Extra Foods (currently closed due to strike).

The rest of retail in the Town Centre is typified by smaller strip centres and street front retail.

The following table displays the utilization of land zoned for commercial use in the Town Core. With 15% of commercial land vacant and another 8% under-utilized there is significant capacity for new commercial development.

Table 13: Utilization of Zoned Commercial Land, Town Centre

Utilization of Zoned Commercial Land				
Commercial Area ¹	Developed	Vacant	Under-Utilized ²	Total Land Area
Town Centre	117.01	23.07	12.53	152.60
Total	117.01	23.07	12.53	152.60
<i>% Distribution</i>	<i>77%</i>	<i>15%</i>	<i>8%</i>	<i>100%</i>
<p>1. Zoned Commercial Area is based on property areas, and does not equal OCP lands designated for commercial use, which includes roads and some sites not zoned commercial.</p> <p>2. Under-utilized sites were defined in the OCP as properties where the assessed value of improvements were less than 10% of the assessed value of the site.</p> <p><i>Source: District of Maple Ridge</i></p>				

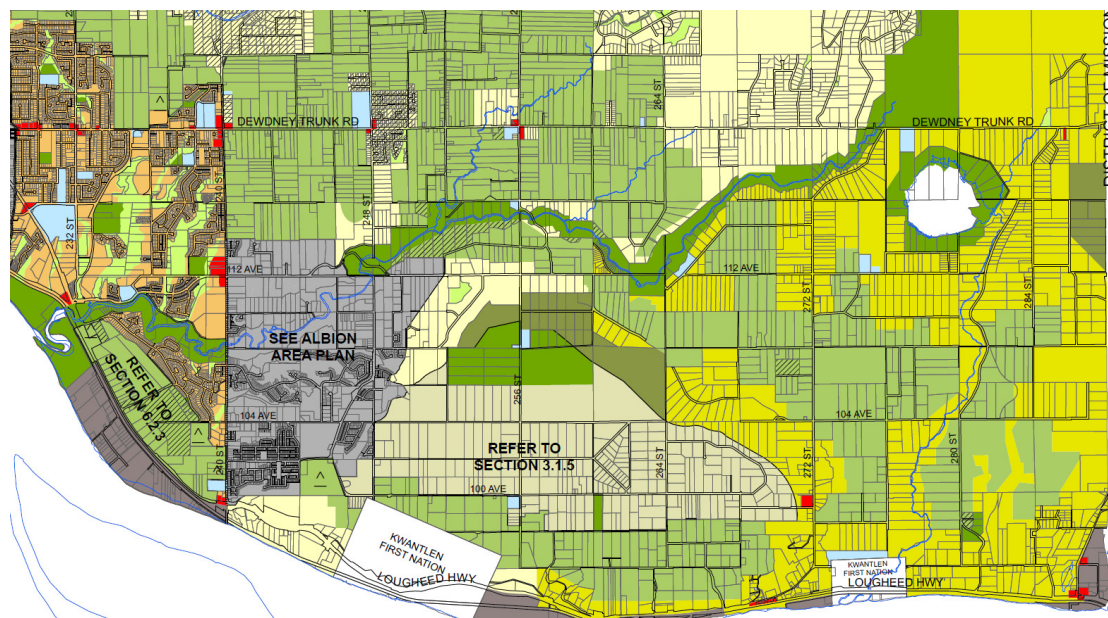
The Town Centre Commercial C-3 zoning which covers much of the Town Centre allows for unlimited height. Commercial is required along key streets, such as Dewdney Trunk Road, Lougheed Highway, and 224th Street, while other streets can be developed with entirely residential uses. Additional multi-family developments would bring much needed density and traffic to support Town Centre retail.

7.2.3 Eastern Maple Ridge

According to District of Maple Ridge data Eastern Maple Ridge, including Albion and East Haney / Cottonwood, and East Maple Ridge for this study, accounts for 3.3% of the total retail space in Maple Ridge, or almost 105,000 square feet.

This retail space in Eastern Maple Ridge is spread out over a very large area. The maps below displays the lands designated for commercial use in red.

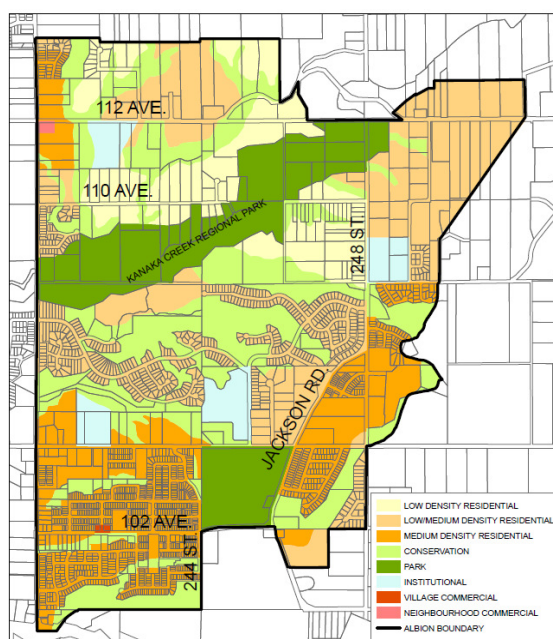
Figure 34: OCP-Designated Commercial Areas, East



The above map covers the entire Eastern Maple Ridge area, while the map to the right provides more detail for the area covered in the Albion Area Plan.

Based on OCP guidelines, East Maple Ridge has a total of 52.5 acres of land designated for commercial use.

The majority of the designated commercial lands are found in East Haney / Cottonwood and East Maple Ridge with almost 27 and 23 acres of commercial land respectively. The Albion Area Plan only has 3+ acres of land designated for commercial use. (*The Albion Area Plan does not include the project at the intersection of 240th Street and Dewdney Trunk Road*).



It should be noted that Eastern Maple Ridge includes two separate Kwantlen First Nation land holdings. The Kwantlen lands to the west, just southeast of Albion, have been suggested as a possible location for a large-format retail development of potentially 250,000 to 350,000 square feet. A project of this size could potentially limit the viability of retail development at the Albion Flats and could have an impact on some businesses in the Town Centre. A separate analysis would be required to determine both the impacts of Kwantlen retail on the Town Centre and the potential for development of retail at both the Albion Flats and at the Kwantlen lands.

The table below displays the designations of commercial space within Albion, East Haney / Cottonwood, and East Maple Ridge.

Table 14: OCP Designated Commercial Lands, East Maple Ridge

Eastern Maple Ridge OCP Designated Commercial Lands (acres)							
Commercial Area	Community Commercial Node	Historic Commercial	Neighbourhood Commercial	Rural Commercial	Village Centre	Total Acres	% of Total
Albion					3.31	3.31	6.30%
East Haney/Cottonwood	12.93		13.69			26.62	50.72%
East Maple Ridge		15.18	1.47	5.91		22.56	42.99%
Grand Total	12.929	15.182	15.154	5.914	3.306	52.484	100.00%
% Distribution	24.63%	28.93%	28.87%	11.27%	6.30%	100.00%	

Source: District of Maple Ridge

The above table illustrates that only East Haney / Cottonwood has a significant amount of land designated for 'Neighbourhood Commercial', and that the majority of commercial lands in East Maple Ridge are designated at Historic Commercial, limiting development options. Significant retailers in Eastern Maple Ridge include Tim Horton's, Starbucks, Macdonald's, and Cooper's Foods grocery store, as well as neighbourhood pubs, automotive services and convenience stores.

The following table displays the utilization of commercially designated lands in Eastern Maple Ridge.

Table 15: Utilization of Zoned Commercial Land: East Maple Ridge

Utilization of Zoned Commercial Land				
Commercial Area ¹	Developed	Vacant	Under-Utilized ²	Total Land Area
Albion	5.07	1.18	1.28	7.53
East Haney / Cottonwood	11.31	0.58	2.34	14.23
East Maple Ridge	7.44	12.72	5.28	25.44
Total	23.82	14.48	8.89	47.20
% Distribution	50%	31%	19%	100%

1. Zoned Commercial Area is based on property areas, and does not equal OCP lands designated for commercial use, which includes roads and some sites not zoned commercial.

2. Under-utilized sites were defined in the OCP as properties where the assessed value of improvements were less than 10% of the assessed value of the site.

Source: District of Maple Ridge

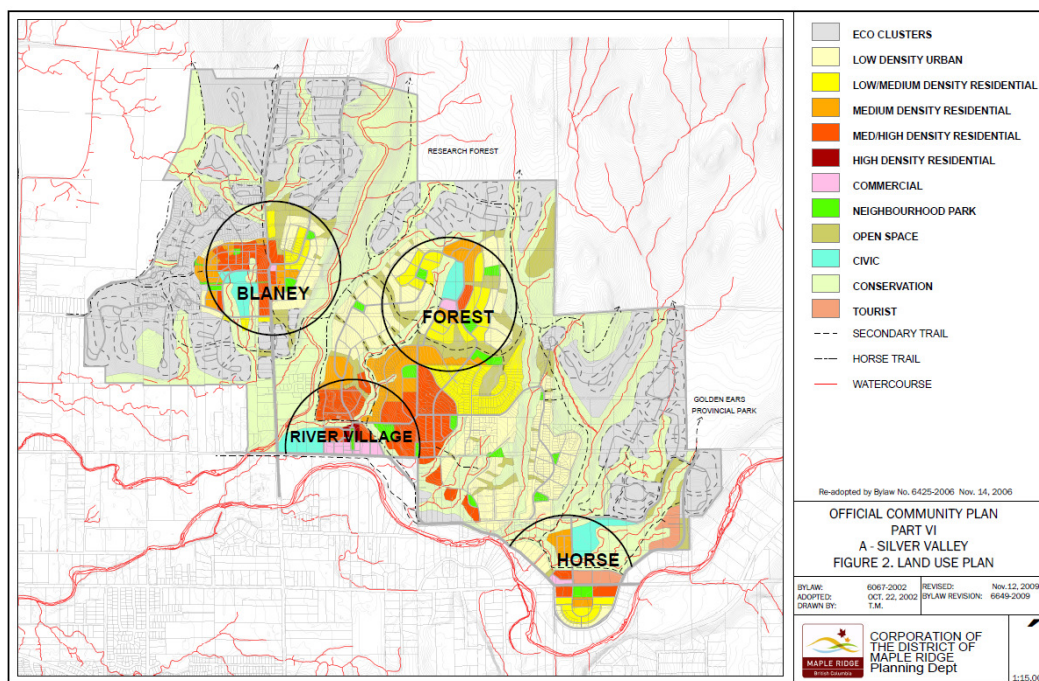
With only 50% of the commercially zoned lands within Eastern Maple Ridge developed there is opportunity for some significant neighbourhood serving retail space. However, the commercial lands in Eastern Maple Ridge are very spread out, so a significant new project is unlikely.

7.2.4 Silver Valley

According to the District of Maple Ridge, the Silver Valley area has 10,474 square feet of existing retail space, or 0.33% of the total retail space in Maple Ridge.

The planned retail in Silver Valley will be clustered in three separate hamlets (Blaney, Forest, and Horse), as well as the River Village, the planned community hub for Silver Valley. In the land use plan for Silver Valley is displayed below. Lands designated for commercial use are highlighted in light pink for 'Commercial' and dark pink for 'Tourist' designated zones.

Figure 35: OCP-Designated Commercial Areas, Silver Valley



Based on the OCP, there is 26.1 acres of land designated for commercial use in Silver Valley. Of this total 22.8 acres is listed as Village Centre Commercial, while 3.3 acres is designated as Historic Commercial.

The designated commercial lands in Silver Valley must be differentiated from existing commercially zoned lands. Most of the designated commercial lands are not currently zoned for commercial use, and are intended to be developed in concert with the adjacent residential lands. Of the 26.1 acres of land designated for commercial development, there is only 1.25 acres that is among the 22.95 acres currently zoned for commercial use in Silver Valley.

There are currently no significant clusters of retail in Silver Valley, and the designated hub for retail in River Village does not have any significant retail presence at the moment. Existing retail in Silver Valley is very small in scale, and currently includes neighbourhood pubs / restaurant, liquor store, community hall and equestrian centre with an attached restaurant.

According to District statistics on site utilization, only 24% of commercially zoned land is either vacant or under-utilized.

Table 16: Utilization of Zoned Commercial Land, Silver Valley

Utilization of Zoned Commercial Land				
Commercial Area ¹	Developed	Vacant	Under-Utilized ²	Total Land Area
Silver Valley	17.47	0.07	5.42	22.95
Total	17.47	0.07	5.42	22.95
% Distribution	76%	0%	24%	100%
1. Zoned Commercial Area is based on property areas, and does not equal OCP lands designated for commercial use, which includes roads and some sites not zoned commercial.				
2. Under-utilized sites were defined in the OCP as properties where the assessed value of improvements were less than 10% of the assessed value of the site.				
<i>Source: District of Maple Ridge</i>				

Although 75% of Silver Valley's existing commercially zoned land is already developed, the majority of lands designated for commercial use are vacant.

7.3 OTHER IMPORTANT RETAIL CONSIDERATIONS FOR MAPLE RIDGE

- Recognizing the importance of revitalizing Maple Ridge's Town Centre, and ensuring all development decisions will not delay the revitalization of the Core.
- Determining the viability of a retail development on the Albion Flats.
- Outlining the potential of a retail development on the Kwantlen Lands, and what the impacts on tax revenue and the downtown core might be.
- Determining the amount of retail outflow that Maple Ridge residents are spending in Langley, Coquitlam, Mission and beyond, formulating strategies to recapture some of this spending.
- A very preliminary estimate of retail space capacity indicates that Maple Ridge could support 4.0 million square feet of retail space, averaging \$350 per square foot.
 - District data indicates that Maple Ridge currently has 3.2 million square feet of retail. Therefore assuming all currently existing retail was operating at \$350 per square foot, an additional 800,000 square feet of retail space in Maple Ridge could be currently be supported. As the population increases the demand for retail space will increase.
 - This very preliminary estimate of retail space capacity would mean Maple Ridge residents are spending almost 32% of their

total expenditures outside of Maple Ridge, which seems reasonable considering competition from Langley and Coquitlam.

- **However the real amount of outflow is expected to be much higher as a large component of retail supply in Maple Ridge is aging and likely not enjoying productivity rates of \$350 per square foot.**

7.4 TRENDS IN RETAIL DEVELOPMENT¹⁴

Retail is constantly evolving as retailers and developers continually look to retain or increase market share of household spending. Of the many recent trends in retail, some of the most applicable to Maple Ridge include the following:

- **Improving the Experience:** Most recent retail trends involve recognizing that while shopping is often something people do daily, it does not have to be a chore. Developers and retailers have gone to great lengths to provide a more enjoyable experience for project visitors including:
 - **Providing Public Space:** We are social animals, and are drawn to areas where there is activity. Public space near retail entices people to linger, and eventually spend more money in the area.
 - **Mix of Uses:** Locating retail next to public amenities such as a library, or employment areas allows daily multi-tasking and the enrichment of our daily lives.
 - **Outdoor Dining:** Outdoor dining areas are proving to be one of the 'new anchors' of retail projects. Seeing people sitting on an outdoor patio helps consumers feel at ease and promotes increased spending.
 - **Creating the 'Urban Resort':** With the success of retail sales in many modern resorts, witness Whistler, the development community is now taking cues from resort villages in order to provide a more memorable daily shopping experience.

Other important trends in retail include:

- **Externalizing Enclosed Shopping Centres:** Rooted in developer efforts to provide a more enjoyable shopping experience, many enclosed shopping centres have removed the enclosed common areas including in areas with poor weather.
- **Mixed-Use Development on Shopping Centre Parking Lots:** Many shopping centres in urbanizing areas have proven to be a very strategic land bank for property owners. As the areas around a shopping centre increase in density, an opportunity to develop on parking lot space has proven a win-win strategy for the town centre and shopping centre owner.

¹⁴ See Section 3.6 for additional retail trends and considerations

- **Recognizing Appropriate Tenants and Tenant Forms for a Town Centre:** Most downtown cores in North America must compete against large big box developments on the urban fringe. With time, it has become more apparent which types of tenants can successfully run business in a town centre. Tenants that provide convenience and specialization, as well as food and beverage operators tend to have the most success. However, progressive large-format retailers have started opening more urban concepts of their stores in Town Centres.
- **Increasing Importance of Health & Beauty:** An increasing percentage of household expenditures are being spent on health & beauty.

7.5 IMPLICATIONS FOR ALBION FLATS

Retail developers have recognized that the Albion Flats are an excellent site on which to build a retail project within underserved Eastern Maple Ridge on a site with excellent vehicular access and visibility. A development on the site would likely attract well-known retailers who currently do not have a location in the Ridge Meadows region.

In comparison to the Lougheed Highway Corridor, the Albion Flats would provide a convenient and easily accessible location that would attract a significant proportion of Maple Ridge residents if the project had a strong tenant list.

In summary, there are number of reasons why the Albion Flats are an attractive location for a commercial development:

- Maple Ridge as a whole is underserved with retail, with residents doing much of their shopping in Langley and Coquitlam.
- East Maple Ridge in particular is underserved with retail, as 95% of Maple Ridge's retail is located in the Town Core, or west of the Town Core along the Lougheed / Dewdney Trunk Trail corridor.
- Many major retailers are not located in Pitt Meadows / Maple Ridge area, and would be attracted to a modern development that fits with their standard large-format store concepts.
- If commercial development proceeds on Kwantlen Lands east of the Albion Flats, Maple Ridge will lose tax revenue and control over project design and size. A large commercial development on the Kwantlen Lands would certainly impact the viability for a commercial project on the Albion Flats.
- Expanded recreational facilities on Albion Flats would create a retail opportunity to serve the additional traffic created by the new facilities.

Any significant commercial development on Albion Flats would have an impact on the Town Centre's revitalization plans, therefore before any retail development on Albion Flats proceeds its impact on the Town Centre would have to be assessed.

8.0 RESIDENTIAL INVENTORY AND TRENDS

8.1 DWELLING UNIT PROFILE AND DISTRIBUTION

8.1.1 Maple Ridge Unit Inventory

In 2006 the District of Maple Ridge had approximately 2.9 persons per occupied dwelling unit. Total dwelling count was approximately 24,480 units.¹⁵ Single detached dwellings accounted for 61% of the total. Other ground-oriented units (semi-detached, row houses and duplexes) made up an additional 23%. The remaining 16% of the housing stock was split between sub-5 storey apartment structures (12%) 5+ storey apartment structures (2%) and mobile homes (1%).

Distribution of Maple Ridge Dwelling Units by Structure Type, 2006

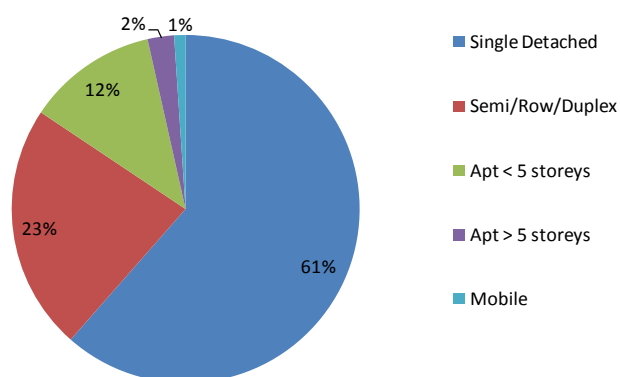


Table 17: Maple Ridge Dwellings by Structure Type, 2006

Maple Ridge Housing by Structure Type, 2006		
Structure Type	# Units	% of Total
Single Detached	15,050	61%
Semi/Row/Duplex	5,600	23%
Apt < 5 storeys	2,970	12%
Apt > 5 storeys	600	2%
Mobile	260	1%
TOTAL	24,480	
Source: District of Maple Ridge, BC Stats, Statistics Canada.		

The District's average household size of 2.9 compared to an average of 2.6 for Metro Vancouver.

¹⁵ Data provided by District of Maple Ridge

In 2010, Maple Ridge has an inventory of approximately 26,600 dwelling units.¹⁶ Based on an estimated 2010 population of 76,650, the District has an average of 2.88 persons per household. This is a slight decrease from 2006 (2.92), and consistent with the trend of declining household size across the Metro Vancouver region.

BC Stats forecasts a long-term decline in household size for the Maple Ridge LHA. Applying BC Stats' household size year-over-year forecast rate of change data to a 2010 baseline household size figure of 2.88, and using the 'scenario 1' population forecast for the District (see Table 4), GPRA forecasts the following household sizes and dwelling units to 2036.

Table 18: Maple Ridge Household Size and Dwelling Unit Forecast

Maple Ridge Household Size and Dwelling Unit Forecast			
	Population	Hhld Size	Dwelling Unit Forecast
2010	76,650	2.88	26,600
2021	93,000	2.63	35,300
2026	101,700	2.62	38,800
2031	109,600	2.61	41,900
2036	116,300	2.59	44,800
Change, 2010-2036	39,650	-0.29	18,200

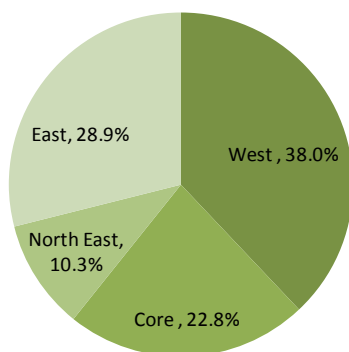
Source: BC Stats, District of Maple Ridge

8.1.2 Total Unit Distribution by Maple Ridge Sub-Region, 2010

In 2010 the distribution of dwelling units by region across Maple Ridge was as follows:

West: 10,100 dwelling units
Core: 6,050 dwelling units
North East: 2,750 dwelling units
East: 7,700 dwelling units

Total Dwelling Unit Distribution by Sub-Region, Maple Ridge



¹⁶ Data from District of Maple Ridge

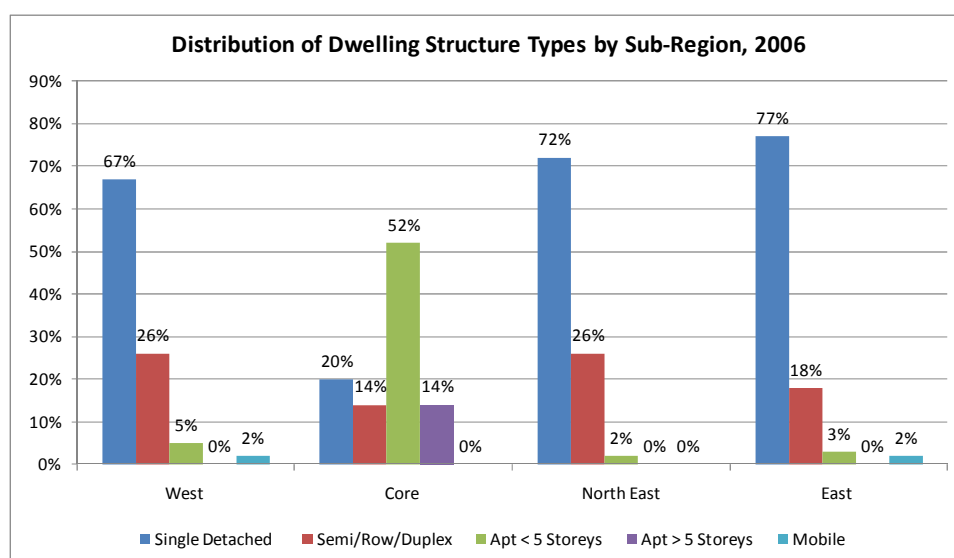
8.1.3 Structure Type Distribution by Maple Ridge Sub-Region

The following data is based on the 2006 Census. While some variation between 2006 and 2010 is likely, the overall picture of unit distribution remains valid.

With the exception of the Core, the dominant structure type in all Maple Ridge sub-regions is single family detached. This type accounted for 67% of all dwelling units in the West, 72% in the North East and 77% in the East.

The core is the only region that contains apartment buildings over 5 storeys. This structure type accounted for 14% of dwelling units in 2006.

Figure 36: Distribution of Dwelling Structure Types by Maple Ridge Sub-Region

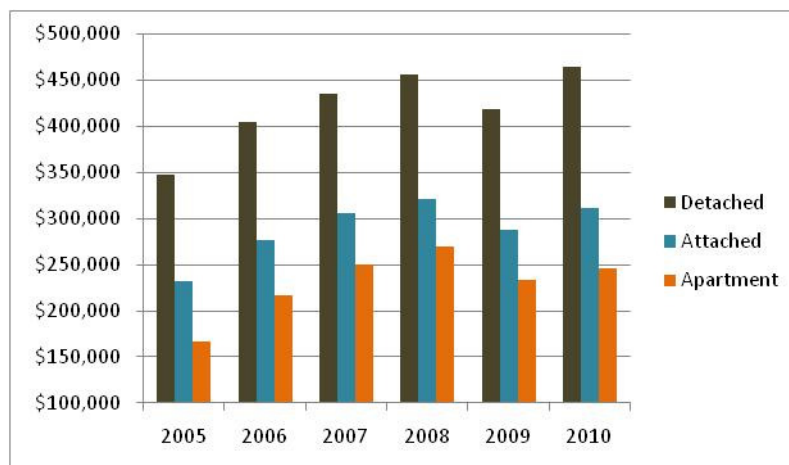


8.2 HOUSING VALUES

As of June 2010, the benchmark price for a single-family detached home in Maple Ridge was \$464,125, while for attached homes and apartments the benchmark price in 2010 was \$311,801 and \$245,750 respectively.

(The Benchmark Price for homes is a measurement calculated by the Real Estate Board of Greater Vancouver on the value of a 'typical' home in each category).

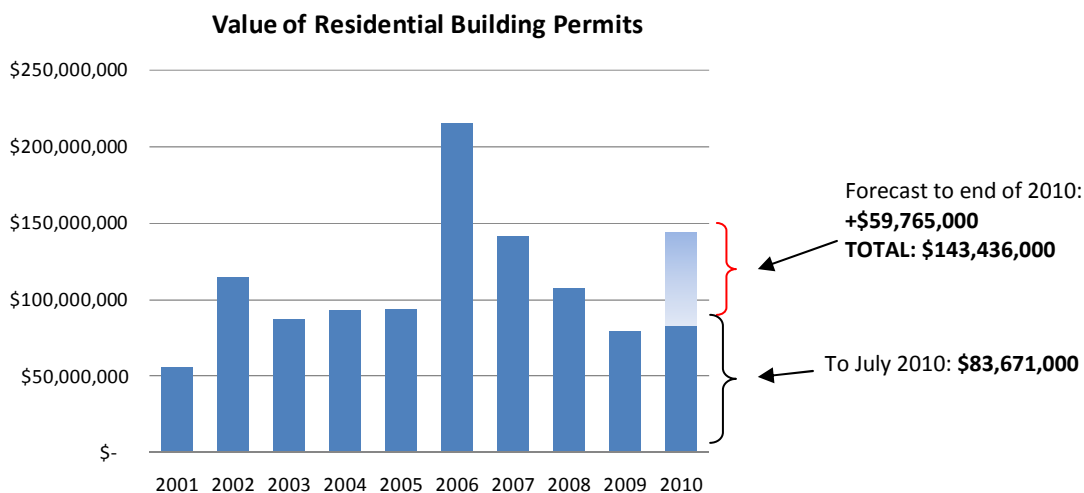
The following chart displays historical housing values in Maple Ridge. The values for detached homes are based exclusively on Maple Ridge sales, while values for attached and apartment units include sales in Pitt Meadows as well as Maple Ridge.

Figure 37: Historical Housing Values in Maple Ridge

Since 2005, the benchmark price for detached and attached homes in Maple Ridge has increased by 34%. The benchmark price for apartments in Maple Ridge increased by 48% since 2005. Since 2005 the average annual increase in the benchmark price was 6.8% for both detached and attached units, and 9.5% for apartments.

8.3 RESIDENTIAL BUILDING PERMIT VALUES

The median annual value of residential building permits in Maple Ridge from 2001 to 2009 was just under \$94 million, with an average value of \$110 million. The peak year was 2006, when building permit values exceeded \$215 million, or more than \$100 million more than the previous high in 2002. Values declined steadily thereafter to \$79.3 million in 2009.

Figure 38: Residential Building Permit Values

8.4 CURRENT PROJECTS

There are 22 separate projects currently selling 1,312 units in Maple Ridge. Of these 1,312 units, 33% are single-family homes, 27% are in low-rise apartment buildings, 25% are in town-homes, 8% are duplexes, and 7% are retirement apartment units.

Asking prices for the different types of housing are as follows:

- Single-family homes: from \$206 to \$266 per square foot
- Town Homes: from \$191 to \$245 per square foot
- Low Rise Apartments: from \$259 to \$302 per square foot

8.5 ANTICIPATED GROWTH

The 2006 Maple Ridge OCP has anticipated a District population of approximately 109,000 by 2031. To accommodate a growing population and a trend toward decreasing household size, the stated objectives of the OCP are to promote increased densities in the Town Centre and infill development.

The OCP emphasis on additional density in the Town Centre and infill projects were in part influenced by the 2004 Sheltair Group report which indicated that, under the land use designations of the 1996 OCP, housing capacity in Maple Ridge would be reached by 2021 (excluding urban reserve).

The three primary areas designated for residential growth are the Town Centre, Silver Valley, and Albion.

Town Centre

- Within the Town Centre, population is expected to increase to nearly 18,000 by 2021, 23,000 by 2031 and 28,000 by 2041.
- By 2021 it is assumed that the Town Centre can accommodate an additional 6,700 dwelling units, bringing the total number of units within the Town Centre to over 11,000.
- At this population level the total density of the Town Centre will be between 70 and 100 people per hectare.

Silver Valley

- The Silver Valley Plan states the objective to accommodate 11,000 residents at build out.
- Silver Valley is planned to include 4 Hamlets that will each include multiple neighbourhoods.
- Low densities in the Silver Valley are to range from 8 to 18 units per hectare

- Medium to medium / low densities will range from 15 to 40 units per hectare. Medium density lands are located nearby to amenities such as schools, commercial or civic uses.

Albion

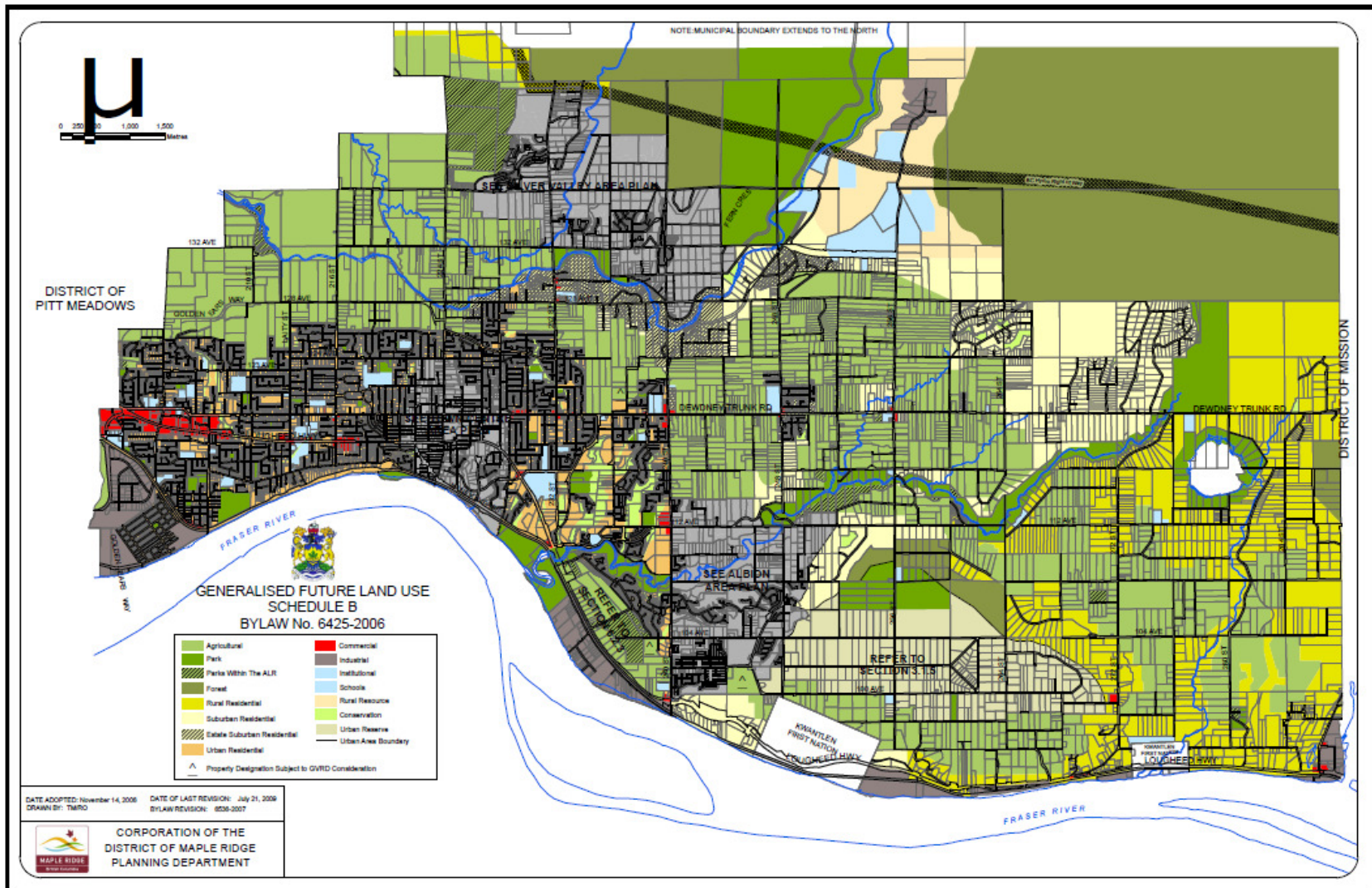
- Growth forecasts in the Albion Plan are less specific, but the plan allows for low, low-medium, and medium density projects.
- Low density refers to single-family lots that are 2,000 metres sq, or half an acre.
- Low-medium density refers to single-detached or duplex houses with lots ranging in size from 5,996 to 9,590 square feet.
- Medium density is referred to in the plan as including smaller lot detached housing, duplex projects as well as townhouses.

Beyond these three primary growth areas, Maple Ridge has a significant amount of land designated as urban residential, the largest amount of which is located between the Town Centre and the boundary with Pitt Meadows. This area could likely see significant amount of infill and redevelopment over time.

In East Maple Ridge, towards Mission, there are significant land areas designated for rural residential and suburban residential which will also see population growth over time.

A map of the proposed general land use plans for Maple Ridge is displayed on the following page:

Figure 39: OCP Proposed General Land Use Schedule



8.6 HOUSING CAPACITY

Calculating the remaining housing capacity in Maple Ridge is an important issue, as it will help determine the extent of pressures to develop lands not currently designated for residential development, such as the Albion Flats.

A preliminary estimate of capacity was made in 2004 based on the 1996 OCP and subsequent District revisions.

- The housing capacity in Maple Ridge was estimated to be 35,100 units, excluding the Urban Reserve.¹⁷
- According to the District of Maple Ridge the current (2010) number of dwelling units across the district is nearly 26,600. Using 2004 capacity estimates, this implies a remaining dwelling unit capacity of 8,500 units.
- Under current minimum lot size designations, the Urban Reserve provides an additional 7,500 units of housing capacity. This brings the total Maple Ridge housing capacity up from 35,100 to 42,600 units. (It is noted, however, that an area planning exercise will likely result in an increase in the number of housing units).
- Given a unit count of 26,600 units in 2010 and a capacity of 42,600 units, the remaining housing capacity of Maple Ridge is approximately 16,000 new units.

The following table highlights the forecasts for Maple Ridge population, household size, and dwelling unit requirements to 2035.

Table 19: Maple Ridge Population Forecast and Required Dwelling Units

Maple Ridge Population and Dwelling Unit Forecast			
	Pop Change	Avg. Hhld Size	New Dwellings Required
2010-2015	7,079	2.77	4,432
2015-2020	7,733	2.65	3,716
2020-2025	8,574	2.63	3,420
2025-2030	8,060	2.62	3,195
2030-2035	6,973	2.61	2,933
2010 to 2035	38,419	2.66	17,695

Sources: District of Maple Ridge; BC Stats; Sheltair Group et. al, 2004.

Based on 2004 capacity estimates, the District would reach its residential capacity between 2032 and 2033 when the population is projected to reach 112,000.

Since 2004, the District has taken steps to increase its residential capacity within the urban area to accommodate future growth in a sustainable manner. This

¹⁷ See Sheltair Group and Kelly & Associates, *Demographic Analysis and population and Housing Projection for Maple Ridge* (2004).

process was culminated in the release of the 2006 OCP, which provided a series of objectives and policies aimed at intensification. These include:

1. Increasing the allowable densities in all areas, but primarily those close to the Town Centre.
2. Flexibility in Area Plans for Albion and Silver Valley areas to allow for changing market and housing demands.
3. Densification along major corridors.
4. Infill in existing neighbourhoods.
5. The adoption of the District Growth Management Policies.

The issue of housing density was also raised during the 2004 Smart Growth on the Ground process that looked at Maple Ridge's Town Core. The recommendation of increased density from this process informed the Town Centre component of Maple Ridge's 2006 OCP.

If the objectives and policies noted are insufficient to accommodate projected growth, additional policy changes may need to be considered.

8.7 IMPLICATIONS FOR ALBION FLATS & AREAS OF FURTHER STUDY

With the development of the Mary Hill Bypass, Pitt River Bridge, and the Golden Ears Bridge, population growth rates in Maple Ridge are expected to maintain an increasing share of the region's population growth.

After a 2004 study determined that Maple Ridge might exhaust its developable residential land base by 2021, the District made adjustments to density allowances as reflected in the 2006 OCP. A new residential capacity assessment would help determine the development pressure that the Albion Flats will face.

The District of Maple Ridge OCP has a well-defined residential growth strategy, which includes specific growth strategies for the Town Core, Silver Valley and Albion areas where the majority of growth has been planned. Whether the allowable densities planned for these growth nodes are sufficient to accommodate forecasted population growth must be reviewed.

As it stands the location of the Albion Flats, with relative accessibility to the Town Core and the Fraser River as well as West Coast Express and highway accessibility, could make it an enticing site for residential development provided that such a developer has appetite for high up-front land preparation and environmental mitigation costs.

9.0 AGRICULTURAL LANDS INVENTORY AND TRENDS

9.1 AGRICULTURAL LAND INVENTORY

There are a number of different sources of data that track the total amount of agricultural land and its usage in Maple Ridge.

- In 2009 and 2004, the District of Maple Ridge, together with the BC Ministry of Agriculture, Food & Fisheries produced an Agricultural Land Use Inventory report. The report describes Maple Ridge agricultural land by use, and provides the overall productivity of the lands based on surveys of land owners.
- The Federal Government completes an Agriculture Census, administered in typical census years. The Agriculture Census tracks land that is actively being used for agriculture purposes and does not track ALR land that is not being used for agriculture purposes.
- The Agriculture Land Commission is another source of data, which includes some land not being used for agriculture, but included in the ALR. The ALC offered the largest agricultural land area for Maple Ridge, and planners suggested that the ALC land area likely included all ALR land plus land used for agriculture that was not included in the ALR.

These three separate data sources provided the following total agricultural area for Maple Ridge:

9.1.1 *Census of Agriculture*

- The 2006 Census of Agriculture indicated there was 1,923 hectares of agriculture land in Maple Ridge.
 - Average area for farms in Maple Ridge was 9 hectares
- Total value of farm receipts in 2006 was \$34.5 million, a decrease of just under 12%.
 - The 2001 Census indicated total farm receipts of \$39.2 million
- The 2006 Census indicated that Maple Ridge had 213 census farms, while in 2001 there were reportedly 237 farms.
- The total number of farm operators in 2006 was 310.

9.1.2 *Agricultural Land Commission Inventory*

- A 2002 – 2004 report for the ALC indicated that the total ALR land area within Maple Ridge was 3,815 hectares.
 - Of this land 3,576.5 hectares had an agricultural rating of Class 1 to 3 (the highest agricultural ratings), representing almost 94% of the agricultural land.
 - 144.7 hectares, or less than 4% of the total, was rated as Class 4 agricultural land.

- 93.8 hectares, or 2% of the total agricultural land in Maple Ridge, was rated as Class 5, 6 and 7.

9.1.3 District of Maple Ridge: Agricultural Land Use Inventory 2009 and 2004 Reports

- The 2009 report calculated the total area of ALR land within Maple Ridge to be 3,848.9 hectares, or 15% of Maple Ridge's total land area.
 - The 2004 reports listed only 3,530 hectares are in the Agricultural Land Reserve in Maple Ridge.
- The 2004 report provided the following table for land use on agricultural lands:

Table 20: Primary Land Use Activity on Agricultural Lands

Primary Land Use Activity on Agricultural Lands					
Primary land use activity	Number of Parcels	% of Parcels	Total area (ha)*	% of Total Study Area	Average parcel size (ha)
Unused Farmland	614	40%	1,076	25%	1.8
Agriculture	563	36%	2,201	52%	3.9
Residential Use	122	8%	25	1%	0.2
Not in use	95	6%	388	9%	4.1
Hobby - Amenity Use	76	5%	127	3%	1.7
Park	30	2%	153	4%	5.1
Institutional Use	12	1%	44	1%	3.6
Land in Transition	8	1%	19	<1%	2.3
Commercial/Service Use	7	<1%	7	<1%	1.0
Unknown	6	<1%	11	<1%	1.9
Mineral extraction	3	<1%	133	3%	44.4
Recreational Use	2	<1%	27	1%	13.3
Transportation & Communications	2	<1%	<1	<1%	0.2
Utility	2	<1%	<1	<1%	0.1
Water Management	2	<1%	<1	<1%	0.5
Golf Course	1	<1%	4	<1%	4.3
Vacant	1	<1%	10	<1%	9.6
Total	1,546	100	4,226	100%	2.7
Source: District of Maple Ridge Agricultural Land Use Inventory, 2004					
* Total Area (ha) refers to the total area of the parcels, and not just the portion of the parcels engaged in the primary land use activity.					

The total area given in this table is greater than the total agricultural land area noted earlier as parcels that include agricultural land often include land area which is not agricultural.

The most common use of the agricultural land reviewed was agriculture, utilizing 52% of the study area land. Unused farmland was the primary activity of 25% of agricultural lands in Maple Ridge. Other uses of agricultural land accounting for over 1% of the study area was vacant / not in use, hobby / amenity, park, mineral extraction, residential or recreation.

The primary agricultural uses of agricultural land in Maple Ridge are displayed in the following table:

Table 21: Agricultural Land Use Inventory

Primary Agricultural Uses					
<i>Primary agricultural land use</i>	<i>Number of Parcels</i>	<i>% of Parcels</i>	<i>Total area (ha)</i>	<i>% of Total Study Area</i>	<i>Average parcel size (ha)</i>
Horse farms	175	31%	618	28%	3.5
Forage and pasture operations	145	26%	548	25%	3.8
Livestock operation - type unknown	87	15%	259	12%	3.0
Extensive livestock (excl. horses)	55	10%	228	10%	4.1
Nursery operations and tree farms	32	6%	166	8%	5.2
Nursery (incl. greenhouses)	10	2%	128	6%	12.8
Greenhouse operation	14	2%	30	1%	2.2
Berry operations and vineyards	20	4%	136	6%	6.8
Miscellaneous crops	16	3%	50	2%	3.1
Poultry and game bird operations	8	1%	34	2%	4.2
Total	562	100%	2,196	100%	3.9
Source: District of Maple Ridge Agricultural Land Use Inventory, 2004					

Horse farms account for the most common agricultural use of land (28%), followed by forage and pasture operations (25%).

- Included in Horse Farms are 3 equestrian facilities and 2 donkey farms.
- Forage or Pasture operations include grass, corn, hay, or vegetables. While some forage produced could go to market, the majority is used for feeding cattle or other farm animals. Pasture refers to land used for grazing livestock.

Livestock and Extensive Livestock operations account for 12% and 10% of agricultural uses in Maple Ridge.

Nursery Operations and Nurseries with Greenhouses account for 8% and 6% of agricultural land usage. Nursery uses include Christmas trees, outdoor

ornamentals, and tree farms for pulp. Nurseries with greenhouse operations were most often producing outdoor and indoor ornamental trees and shrubs.

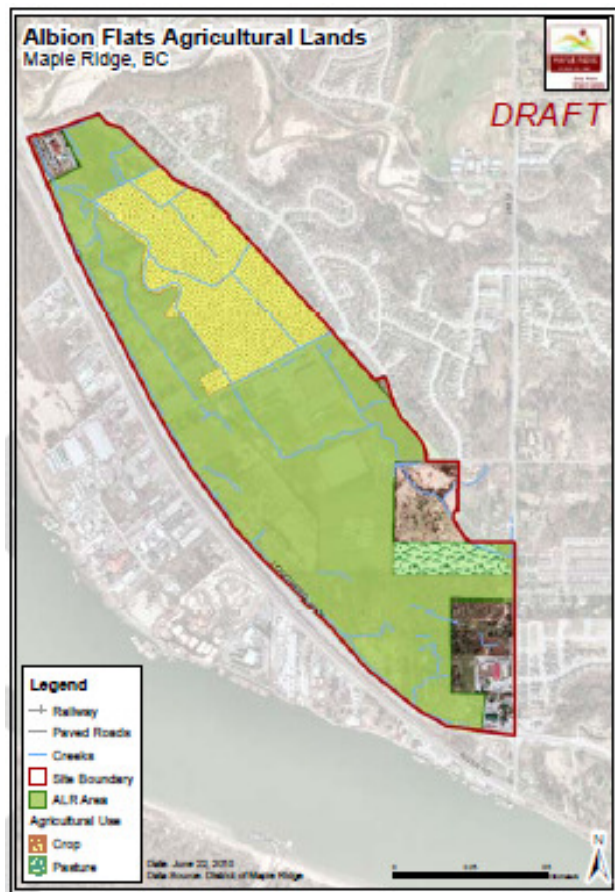
Berries and Vineyards account for 6% of agricultural area in Maple Ridge with blueberries and cranberries utilizing 62 and 68 hectares of land each. Vineyards were utilizing 6 hectares of land at the time of the 2004 report.

9.2 TRENDS & IMPLICATIONS FOR THE ALBION FLATS

The methodology used by Maple Ridge to classify agricultural lands changed between 1996 and 2004; however, the study reported an increase of agricultural land usage between those periods. The following map displays agricultural uses as of 2004.

Uses on the Albion Flats include agriculture, recreation, unused farmland, residential, park, commercial / service as well as lands that were not in use.

Figure 40: Map of ALR-designated Lands on the Albion Flats



The above figure displays the boundaries of ALR lands within the Albion Flats site. In total 89% of the Albion Flats, or 275.7 acres is located within the ALR. Only the northwest corner, the south east corner, and a section on the eastern boundary are excluded from the ALR, highlighted in the map above.

The Agricultural Land Commission suggested that the Albion Flats land north of 105th Avenue was classified to have strong agricultural potential. Without making any firm commitments, the ALC suggested that it would likely want to see the lands north of 105th Avenue remain in the ALR.

However, the agricultural potential of the lands north of 105th Avenue is negatively impacted by seasonal flooding. As a result, it was suggested that if an investment was made to mitigate the impacts of seasonal flooding for these lands the ALC might look favourably on a request to withdraw lands to the south of the site from the ALR.

Given that there are a number of smaller lots in the Albion Flats that are listed as being 'unused farmland' (see the map on the following page) the ALC suggested its preference that the smaller sites would be consolidated and used for agriculture, especially those north of 105th Avenue.

According to Figure 42 on page 78, one of the larger sites on the Albion Flats was listed as having newly adopted agricultural uses. Figure 42 displays the changes in land use, with shades of green highlighting where new agricultural use were added and shades of red highlighting lands where agricultural uses were removed.

The large plot of land on the Albion Flats north of 105th Avenue is indicated to have a new agricultural use of growing crops. This property is listed as having forage as a primary use, and cranberry production as an ancillary use.

While the Albion Flats ALR lands north of 105th Avenue were suggested to have soils well suited to agricultural uses, the lands in the southern end of the site had soils that were not highly classified.

As a result, the ALC suggested that the lands with less highly classified soils to the south would be more likely to gain exemption from the ALR than the lands to the north of 105th Avenue.

There is currently an application in Maple Ridge to have 152 acres of land formerly used as a tree nursery removed from the ALR. The Council of Maple Ridge forwarded the application to the ALC. The ALC suggested that a decision might be made on the application by mid-October 2010. The application to have 152 acres exempted from the ALR in Maple Ridge could impact any applications for ALR removal for the Albion Flats.

The map on the following page displays the primary land use activities in Maple Ridge:

Figure 41: Map of Primary Land Use Activities, District of Maple Ridge

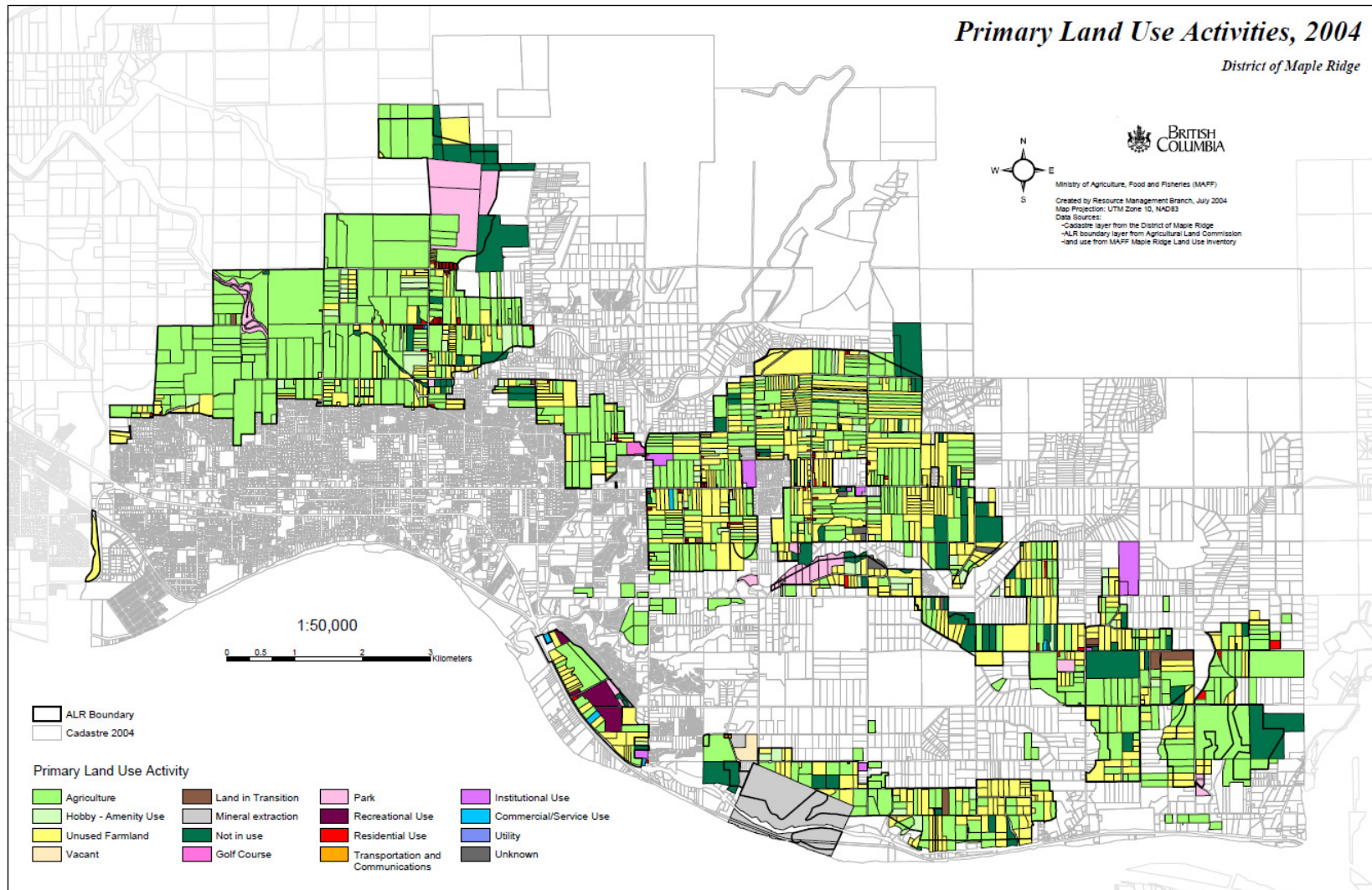
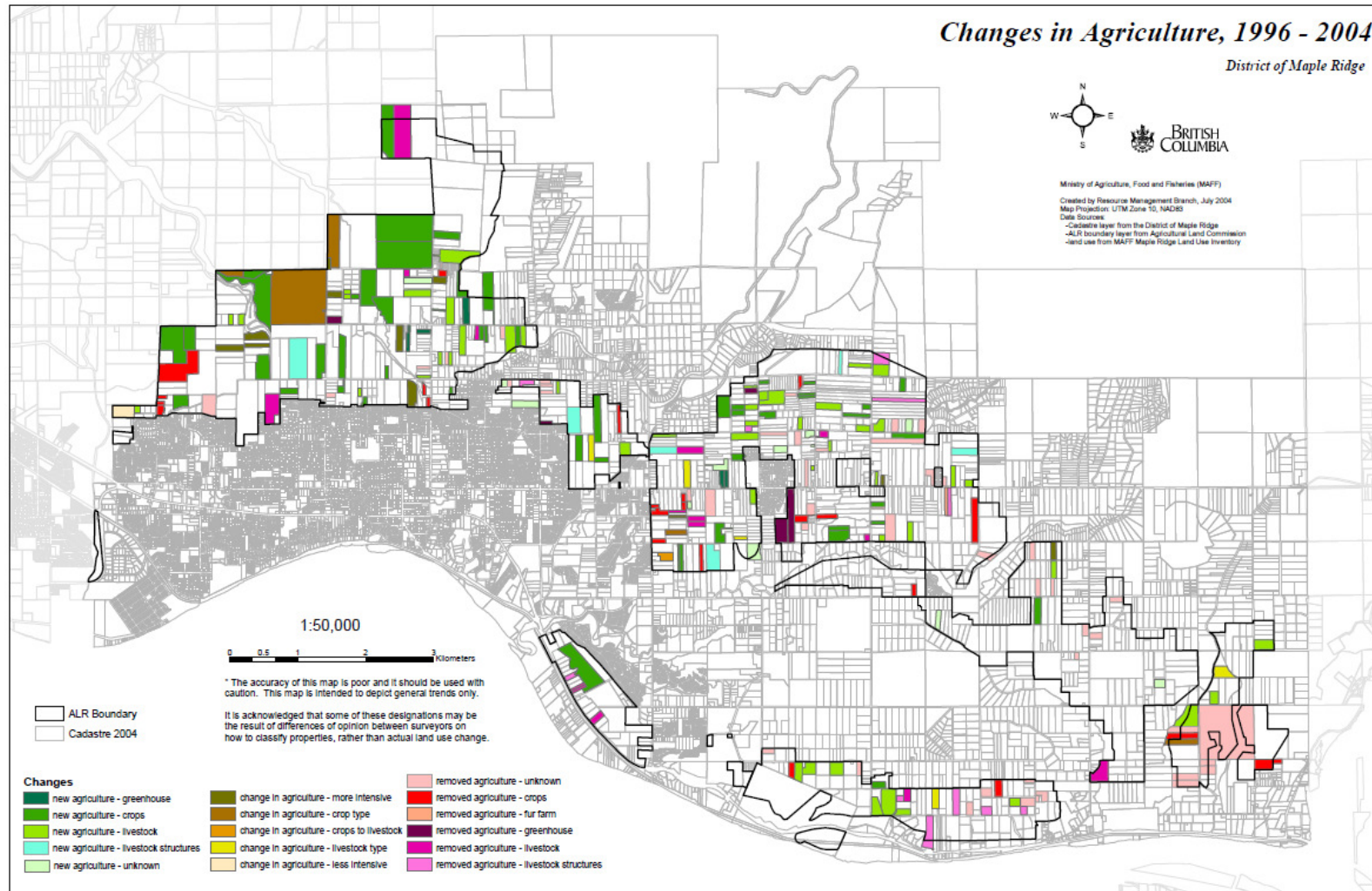


Figure 42: Changes in Agricultural Uses, District of Maple Ridge, 1996 to 2004



The 2009 Maple Ridge Agricultural Plan focussed less on taking inventory of agricultural lands than highlighting the issues facing the agricultural sector in Maple Ridge. Some of the issues discussed in the report that might have implications for the Albion Flats include:

- Gaining access to underutilized agricultural lands
- Loss of the agricultural land base
- Gaps in the local food system infrastructure
 - Including the local marketing system and issues with flood control
- Limited Diversity in Agricultural Activity
- Stress in the Agricultural-Residential Interface
- Incompatible Land Use Zoning Context for the Agricultural Land Reserve

The 2009 Maple Ridge Agricultural Plan produced too many recommendations to list, but some of the recommendations included:

- Promote opportunities for urban agriculture
- Improve Public Relations of the agriculture sector
- Investigate potential for local marketing cooperatives as well as shared industrial infrastructure such as processing facilities and mobile slaughter facilities
- Implement OCP policies to protect agricultural land base to minimize encroachment of non-agricultural uses on agriculturally designated lands
- Require compensation from agricultural land conversion to increase the agricultural capacity of the District
- Look to increasingly incorporate agriculture in economic development strategies

10.0 COMMUNITY AND RECREATIONAL LANDS

10.1 PARKS, RECREATION & CULTURE MASTER PLAN

The Albion Flats currently include multiple community and recreational uses, and there is interest to add to these uses on the Albion Flats.

The District of Maple Ridge and the City of Pitt Meadows have recently produced a coordinated Parks, Recreation and Culture Master Plan. This master plan is dated March 2010, and has been adopted.

The Master Plan covers a wide variety of public / community land uses, from parks, trails, cemeteries, dog-off leash areas, equestrian facilities, arenas, aquatics museums, cultural facilities, and all other indoor and outdoor recreational facilities.

Some of the recommendations from the report include specific goals for the Albion Flats:

- The report recommends expansion of sports fields and ball diamonds, with specific reference to expansion of the field space adjacent to the Albion Fairgrounds on the Albion Flats.
 - A concept plan for the expansion of the recreation facilities at Albion Flats was created in 2002.
 - The concept plan included adding capacity for three new baseball diamonds and 2 new soccer fields.
 - Even with a new synthetic field in Pitt Meadows, fields in the area are operating at capacity as all field using sport associations are seeing consistent increases in membership.
- A new indoor multi-purpose facility is recommended for East Maple Ridge. The report highlights the Albion Flats as a potential location. The indoor multi-purpose facility would include an indoor field house that could host social functions and major events.
 - The proposed new facility at Albion Flats was to be located on the gravel fields close to the area.
 - The uses of the multi-purpose facility were not finalized, but a new facility in East Maple Ridge is considered necessary based on the amount of growth that is occurring in the area.
 - Potential uses in the new facility could be a field house with an indoor soccer field inside a running track, to provide activity space during the winter, as well as a fitness centre (weight and exercise room).
 - Parking space at the Albion Sports Complex also needs to be expanded. The parking lot is often at capacity when all the fields are in use, during tournaments, or when there is a special event at the Albion Fairgrounds.

- It is suggested that a new sheet of ice will soon be required in Maple Ridge / Pitt Meadows to maintain the target 1 sheet per 18,400 population ratio. The report suggested Planet Ice on the Albion Flats could be renovated to include an additional sheet.

At Albion Park, which is 1 kilometre east of the Albion Flats on 104th Avenue, significant recreational expansion and upgrades are also planned. Funding has already been approved for the following:

- A new spray / water park
- Mountain bike / BMX trails
- Irrigation upgrades to the soccer field

Additional upgrades at Albion Park that are planned, but which have not yet received funding include:

- Tennis courts
- Mountain Bike / BMX skills development park
- Skateboard park
- Additional parking space

Other areas where the Maple Ridge and Pitt Meadows Parks Recreation and Culture Master Plan see services that need to be expanded include:

- Increase the opportunities for urban agriculture.
- Increase the number of off-leash dog areas
- Expand the network of trails and greenways, either through land acquisition or the development process.
- Develop an additional cemetery in Maple Ridge to accommodate increasing population growth.
- The development of a natural bowl / amphitheatre for outdoor concerts. The report suggests there might be a suitable location for an outdoor amphitheatre on the 'Jackson Farm'.

10.2 IMPLICATIONS FOR ALBION FLATS

The recommendations of the Maple Ridge and Pitt Meadows Parks Recreation and Culture Master Plan, dated March 2010, envision the Albion Flats as a location for many of its planned facilities.

Even though additional development on the Albion Flats would require removing land from the Agricultural Land Reserve, District plans for the area include:

- 3 new baseball diamonds and 2 new soccer fields
- A multi-purpose indoor recreational facility
- An additional sheet of ice at Planet Ice
- An expanded parking lot

11.0 SUMMARY OF IMPLICATIONS FOR ALBION FLATS

This study was commissioned to provide a preliminary socio-economic overview of the issues that will play a role in planning for future uses at the Albion Flats. The study was organized to include sections on Maple Ridge's population growth and structure, the location and connectivity of Maple Ridge within a regional context, as well as overviews of the dominant land uses and sectors.

A review of the major land uses in Maple Ridge revealed that demand for each use was increasing, and a case could be made to include each use within the Albion Flats.

With strong demand for different land uses on Albion Flats, Maple Ridge has the opportunity to potentially combine a mix of uses in a progressive way while retaining some of the important natural features of the site.

Phase 2 of G.P. Rollo & Associates analysis will therefore look at what the optimal mix of uses for the site would be.

Key findings are below:

Albion Flats Location & Linkages

- Investment in transportation infrastructure has dramatically improved regional access to Maple Ridge and the Albion Flats. With the enhanced connectivity to the rest of Metro Vancouver, an increase in development activity for all types of land uses is expected in Maple Ridge.
- The Albion Flats' location on the Lougheed Highway just east of the Town Centre makes it attractive for developers of all land use types.

Population Growth

- Forecast for 74% to 85% population growth over 35 years to 2036.
- The population of the Town Centre is forecasted to increase by 201%. Such an increase in population in the core will need to be matched by retail and public amenities.
- The population over 75 years of age is forecast to grow by 256% from 2006 to 2036. Older residents will increase demand for walkable neighbourhoods, transit access and multi-family dwellings.
- Albion Flats would be an excellent location for either new public amenities, retail, or residential uses to meet the growing population.

Industrial

- Currently the Albion Flats is designated an agricultural area within the Green Zone in the Metro Vancouver Livable Region Strategic Plan. The LRSP offers no special treatment for re-designation of agricultural to industrial.

- The Albion Flats offers approximately 180 acres of developable area¹⁸ with proximity to existing industrial areas, transportation infrastructure and possible servicing extensions. It could be an attractive area for light industrial and business park users.
- With investment in industrial lands increasing after the development of the two new bridges, Albion Flats will likely be a much sought after site from industrial developers if industrial uses are approved.

Commercial

- The Albion Flats is a very strong location from a commercial standpoint.
- Maple Ridge as a whole is commercially underserved. Residents tend to shop in Langley and Coquitlam, highlighting the demand for new retail space in Maple Ridge.
- East Maple Ridge is particularly underserved with retail, as 95% of Maple Ridge's retail is located in the Town Core, or west of the Town Core along the Lougheed / Dewdney Trunk Trail corridor.
- Many major retailers are not located in Pitt Meadows / Maple Ridge area, and as the population base of Maple Ridge grows these retailers will seek to locate in the District at location that fit with their standard store concepts and formats.
- If commercial development proceeds on Kwantlen Lands, Maple Ridge will lose potential tax revenue from new retailers and current tax revenue from retailers relocating. The District will also lose control over project design and size.
- Expanded recreational facilities on Albion Flats would provide additional activity to the site, creating added synergies for retail.
- Before any retail development on Albion Flats proceeds, its impact on the Town Core's revitalization plans will need to be analysed.

Residential

- With its strong location adjacent to the Town Centre, the Fraser River, and the Albion neighbourhood, the Albion Flats would be an excellent location for a new multi-family residential project.
 - Due to the demand from other uses on the site, it is likely that if residential uses were approved, it would be part of a mixed-use project.
- With the recent investment in transportation infrastructure, population growth rates in Maple Ridge are expected to maintain an increasing share of the region's population growth.

¹⁸ This figure accounts for all stream setbacks on site. It does not account for other environmental constraints such as flood plain and, geotechnical issues, as outlined in the HB Lanarc *Albion Flats Environmental Baseline Report* (2010).

- Maple Ridge's growth strategy includes specific growth plans for the Town Core, Silver Valley and Albion areas where the majority of growth has been planned. Whether the allowable densities planned for these growth nodes are sufficient to accommodate forecasted population growth must be reviewed.
- A new residential capacity assessment would help determine the development pressure that the Albion Flats will face.

Agricultural

- Most of the Albion Flats are located within the Agricultural Land Reserve, and therefore development of any non-agricultural uses on the site would require ALR exclusion.
- Conversations with the ALC revealed that the Albion Flats lands north of 105th Avenue possess higher-quality soils (class 2) than lands south of 105th.
- Some lands on the Albion Flats were previously approved for a non-farm use to allow for the development of the ice rink and the playing fields.
- Based on the soil qualities, the ALC would be more willing to consider land uses other than agriculture for the Albion Flats lands south of 105th Avenue than those to the north.

Recreational

- The Maple Ridge and Pitt Meadows Parks Recreation and Culture Master Plan, dated March 2010, envision the Albion Flats as a location for many of its planned facilities.
- Even though additional development on the Albion Flats would require approval for non-farm use, District plans for the area include:
 - 3 new baseball diamonds and 2 new soccer fields
 - A multi-purpose indoor recreational facility
 - An additional sheet of ice at Planet Ice
 - An expanded parking lot