

# COMMERCIAL & INDUSTRIAL STRATEGY: 2012-2042

DISTRICT OF MAPLE RIDGE

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Prepared by:  
G.P. Rollo & Associates, Land Economists

## EXECUTIVE SUMMARY

G.P. Rollo & Associates (GPRA) was commissioned by the District of Maple Ridge to undertake a District-wide commercial and industrial strategy. This strategy is an important component of Maple Ridge's long-term planning in the context of shifting regional economic conditions, new transportation infrastructure, rising land costs, shrinking availability of employment lands, and a host of regulatory and market issues. With this report, GPRA's intent is to provide the District with a road map to help it navigate the industrial and commercial landscape, positioning the District for future growth and prosperity.

GPRA's work includes detailed employment analysis – both baseline development and projections – as well as land demand forecasting for industrial and commercial uses.

### Employment

Metro Vancouver has targeted 48,000 total jobs in Maple Ridge by 2041. GPRA has adopted this as a 'high' growth forecast and supplemented it with a more conservative forecast of 42,500 jobs based on an updated assessment of the competitive landscape and employment trends.

As the table below indicates, Maple Ridge is already doing relatively well in terms of providing jobs for its residents, compared to neighbouring and nearby municipalities.<sup>1</sup>

| <b>Population Employed in Municipality of Residence</b> |  |  |  |  |
|---|--|--|--|--|
|   | <b>Total Employed<br/>in Municipality<br/>of Residence</b> | <b>% Employed<br/>in Municipality<br/>of Residence</b> | <b>Total Employed<br/>in Municipality<br/>of Residence</b> | <b>% Employed<br/>in Municipality<br/>of Residence</b> |
|   | <b>2001</b>  |  | <b>2006</b>  |  |
| <b>Surrey</b>   | 63,895   | 38.1%  | 76,495   | 38.5%  |
| <b>Maple Ridge</b>                                      | 11,385   | 36.4%  | 12,715   | 35.4%  |
| <b>Langley (DM)</b>                                     | 16,405   | 35.8%  | 18,110   | 35.4%  |
| <b>Delta</b>  | 14,770   | 29.5%  | 16,225   | 32.0%  |
| <b>Coquitlam</b>  | 13,990   | 24.9%  | 16,590   | 27.9%  |
| <b>Langley (CY)</b>                                     | 2,465  | 21.2%  | 2,790  | 22.9%  |
| <b>Port Coquitlam</b>                                   | 6,075  | 22.6%  | 6,455  | 22.3%  |
| <b>New Westminster</b>                                  | 6,320  | 22.2%  | 6,530  | 20.2%  |
| <b>Pitt Meadows</b>                                     | 1,305  | 17.0%  | 1,525  | 17.8%  |
| <b>Port Moody</b>                                       | 1,800  | 14.0%  | 2,485  | 16.0%  |

The sectors with the most growth potential in Maple Ridge include: Business Services, Manufacturing, Retail, Education, as well as Health & Welfare / Public Administration.

Key sectors the Economic Development Office should focus on include Manufacturing, Tourism, Business & Commercial Services, as well as

<sup>1</sup> With their large regional employment hubs Vancouver, Burnaby, and Richmond were left off the list.

Finance, Insurance and Real Estate (FIRE). Maple Ridge is below regional averages for employment in these sectors, except for Manufacturing.

**Land Demand**

Metro and GPRA employment projections (high and low scenarios) are translated into land demand as follows:

| <b>Land Demand for Forecasted Jobs by 2041</b> |                                 |                                 |   |   |
|--|---------------------------------|---------------------------------|---|---|
|  | <b>Metro Vancouver Forecast</b> | <b>Metro Vancouver Forecast</b> | <b>Lower Employment Growth Scenario</b> | <b>Lower Employment Growth Scenario</b> |
|  | <b>Acres</b>                    | <b>Hectares</b>                 | <b>Acres</b>                            | <b>Hectares</b>                         |
| <b>Retail</b>                                  | 110                             | 45                              | 100                                     | 40                                      |
| <b>Insitutional</b>                            | 80                              | 32                              | 70                                      | 28                                      |
| <b>Industrial</b>                              | 230                             | 93                              | 170                                     | 69                                      |
| <b>Office</b>                                  | 50                              | 20                              | 30                                      | 12                                      |

Source: GPRA, HBLG Forecast

Land areas in this table are the total projected land areas required for each use, and could be supplied by development on vacant lands or redevelopment of underutilized lands.

**Retail & Service Commercial**

Based on detailed demand forecasting by sub-region, taking into account regional competition and the potential for outflow spending recapture, GPRA finds that District-wide demand will call for 1.3 million square feet, 121,000 square metres, of net new retail and service commercial floor area by 2042. Using conservative density assumptions, this will require between 73 and 114 acres of land to accommodate (30 to 46 hectares). Maple Ridge largely has sufficient OCP-designated land supply to accommodate projected growth.

Space demand (square feet) by sub region – as depicted in Figure 3 on page 32, will be:

- 637,000 square feet in the Town Centre
- 443,000 square feet in the West
- 90,000 square feet in the ‘Core East’ area
- 27,000 square feet in the East
- 84,000 square feet in the North

Land demand by sub-region will be:

- 33 to 55 acres (13 to 22 hectares) in the Town Centre
- 23 to 38 acres (9 to 15 hectares) in the West
- 6 to 8 acres (2 to 3 hectares) in the Core East area
- 2 to 3 acres (1 hectare) in the East
- 6 to 8 acres (2 to 3 hectares) in the North/Silver Valley

Regarding the potential for a waterfront comprehensive development site, the current log-sort site to the east of 224<sup>th</sup> Street would provide a good location for this type of use given its proximity to Town Centre amenities.

### **Office**

Employment-based office demand projections indicate that between 4,300 and 6,300 additional employees will require office space over the next 30 years. It is anticipated that 25% of these office-based jobs will be directed to industrial/business park environments, with the balance going to the Town Centre, the Dewdney/Lougheed corridor in the west, and to small office clusters in the North. To accommodate this net new office space demand, the District will need between 30 and 50 acres (12-20 hectares) of land. This office space could be developed on vacant or currently underutilized lands.

As currently designated, there will be sufficient land area in the Town Centre to accommodate projected office requirements, provided that much of it is housed in mixed-use environments. There is also sufficient land in the Lougheed/Dewdney corridor.

### **Industrial**

Industrial land demand forecasts based on employment growth and space utilization metrics indicate that Maple Ridge will require between 170 and 230 acres (69 to 93 hectares) of additional industrial lands by 2040. Finding vacant, developable industrial land that is appealing to major potential tenants will be an issue in the medium to long term.

Even though there is plenty of vacant and underutilized industrial land supply in north Maple Ridge (calculated at a combined 290 acres). These lands are likely to mostly attract resource-based companies due to their distance from arterial roads. Additional lands with full servicing and proximity to transportation routes is required to remain competitive with other municipalities.

Assuming that the rezoning application for 40 acres south of Maple Meadows Business Park at 11055 Hazelwood Street is approved and the site becomes M-3, Maple Ridge will still require additional industrial lands with servicing and highway access to accommodate projected demand.

Maintaining the status quo on industrial land supply is an option (following rezoning of the Hazelwood Street site), but long-term result would be Maple Ridge losing out on development and jobs. Planning for additional industrial supply should therefore begin now with an eye to the future.

Options for providing additional land supply could include some combination of: (1) the Albion Flats, (2) the lands at 232<sup>nd</sup> Street and 128<sup>th</sup> Avenue, (3) Ministry of Transportation lands between the Haney Bypass and Lougheed Highway, (4) and/or lands adjacent to the Kwantlen First Nations' lands along the Lougheed Highway east of 240<sup>th</sup> Street.

Further ALR exclusion applications could be put forward as a strategy to source new lands, but GPRA believes this should be an option of last resort. Recent exclusion applications have not been successful (e.g. Pelton Lands), and the ALC has toughened their stance on exclusions since 2010.

Another last resort option for additional industrial lands beyond applying for ALR exclusions could include utilization of lands within the urban area boundary but currently designated for residential use.

Infrastructure issues must also be dealt with to promote industrial development, including either improving the dykes or raising the lands at the Albion Industrial Park, along with improving access to this area. As well, improved access to the lands at 256<sup>th</sup> Street would also be beneficial.

Development incentives to promote consolidation and redevelopment in the Albion Industrial Area should be considered. These incentives, along with infrastructure improvements could be a catalyst to attract development which is not expected for over 10 years.

**SUMMARY OF STRATEGIES:**

*(More detailed recommendations are found within the body of the report).*

| Employment | Strategies  |
|------------|---|
|            | Continue to support the Economic Development office, and its focus on business attraction and retention, as well as promotion of the Tourism sector, and the development of educational facilities. |
|            | Maple Ridge can expect job growth in many sectors. Those not tied to population growth should get additional attention, including Manufacturing and Information / Culture.                          |
|            | Extend the Town Centre incentive program beyond 2013. Encourage office and hotel development in the Town Centre.  |
|            | Continue to promote home-based businesses as well as an ‘executive business centre’.  |
|            | Use jobs estimate in this report to track changes in employment by sector.  |
|            | Promote northern industrial sites to those looking for affordable industrial land.  |

| Retail                       | Strategies  |
|------------------------------|---|
| Town Center                  |   |
|                              | Analysis indicates there is no need to designate additional commercial lands in the Town Centre. It is recommended that applications for additional ground floor commercial in areas not designated for commercial use be considered on a case-by-case basis. Ensure that future retail space is concentrated in viable, well-anchored and themed commercial precincts. |
|                              | Support the long-term redevelopment of Haney Place Mall into a mixed-use residential / commercial project.  |
|                              | Focus on differentiating the Town Centre, making it the District's centre for specialty retail, entertainment / culture, civic uses, and destination restaurants.   |
|                              | Animate the public space around Memorial Peace Park. Restaurant space should be encouraged at 224 <sup>th</sup> and McIntosh Avenue. Food carts could be another good active use for the area.  |
| West Maple Ridge             |   |
|                              | Encourage densification and 'urbanization' of retail plazas over time. Encourage new retail to be built close to the street.  |
|                              | Large format retail uses going to the west should be clustered along the Lougheed Highway at existing shopping centres. Lands designated for industrial use should not allow large-format retail.   |
| Core East                    |   |
|                              | If retail is developed on the Albion Flats it would likely redirect some of the spending and square footage potential allocated to the Town Centre and to the West.   |
|                              | Examine potential to expand designated retail space on the east side of 240 <sup>th</sup> street north of 112 <sup>th</sup> . Consider the potential for the southwest corner of Dewdney Trunk Road and 240 <sup>th</sup> Street for a neighbourhood serving retail node.   |
| Silver Valley / North / East |   |
|                              | While commercial development in Silver Valley will likely remain slow, all of the commercial space should be retained and not converted into residential, as this is an important 'land bank' for the future.   |
|                              | Within each Hamlet, it is recommended that the designated 560 square feet of commercial space is retained.  |
|                              | The east has sufficient commercial land area to evolve organically as demand allows.  |

| Industrial  | Strategies   |
|-------------|--|
| Strategy #1 | Status Quo   |
|             | Meet demand with existing industrial lands, including 46 acres about to be rezoned in Southwest Maple Ridge. Weakness with this scenario is the lack of prime industrial lands, and the likelihood that Maple Ridge will lose out on job growth to other municipalities.   |
| Strategy #2 | Redevelopment of Albion Industrial Park  |
|             | The District could provide incentives to promote the redevelopment of the Albion Industrial Park. Significant development in this area is not expected for 10 years or more. There are major infrastructure costs needed before significant redevelopment occurs, including improving the dyke, dealing with potential site contamination issues, as well as improving vehicular access to the area.   |
| Strategy #3 | Albion Flats   |
|             | The ALC has recommended that the District come forward with one application to remove lands south of 105th from the ALR. It is recommended that employment uses be a major component of any development on the Albion Flats, including light industrial and office uses.   |
| Strategy #4 | 232 <sup>nd</sup> Street / 128 <sup>th</sup> Avenue  |
|             | The approximately 50 to 60 acres of land at this intersection is designated for urban development. These lands could be developed with light industrial and office park uses. While not an ideal location, it is closer to arterial roads than industrial lands in the north, or the lands in Ruskin or Whonnock.  |
| Strategy #5 | Development of Transportation Lands  |
|             | The Department of Transportation owns 38 acres of land to the west of the eastern intersection of the Lougheed Highway and the Haney Bypass. Although these lands have slope issues and a number of streams running through the site potentially 50% of the site could be developable. Redesignating these lands for industrial use is recommended.  |
| Strategy #6 | Lands Adjacent to Kwantlen First Nation  |
|             | There are lands to the east and west of the Kwantlen First Nations land along the Lougheed Highway that could be redesignated for industrial use if demand is outstripping supply in the future. Both sites have slope issues. Currently both sites are outside of the Urban Area Boundary and zoned R-3. Metro Vancouver's regional growth strategy will be impacted by any redesignation of the site. Before pursuing redesignation it is recommended a study be done to confirm the feasibility of industrial development on these lands. |

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## 1.0 INTRODUCTION

G.P. Rollo & Associates (GPRA) has been commissioned by the District of Maple Ridge to produce a commercial and industrial strategy in order to meet the District's future employment demands and ensure the District remains competitive within the region. Maple Ridge is projected to be one of the leading municipalities in Metro Vancouver for growth over the next 30 years, and strategies on how to accommodate and attract this growth need to be created.

Maple Ridge has already been growing faster than the regional average and the rate of population and employment growth in Maple Ridge is expected to increase.

In order to accommodate projected growth, Maple Ridge must ensure it has the land supply for industrial, commercial and office users. Beyond pure land supply, the regulatory environment, including zoning by-laws and development incentives will dictate the District's ability to attract businesses.

As a community that is already recognized for providing an attractive lifestyle, it is the intention of the District to grow in such a way that maintains resident lifestyle, while increasing the opportunity for residents to work in Maple Ridge.

With a Council and population that are both ready to embrace growth done properly, it is excellent foresight that the District is taking this time to ensure it has the proper plans in place to accommodate and take advantage of future growth potential.

In order to understand how Maple Ridge should plan for future growth to 2040, this report has been prepared to look at employment growth as well as industrial and commercial land supply and demand.

This report includes four major topics:

- Review and forecast employment in Maple Ridge
- Recommendations to promote employment in Maple Ridge
- Forecast of commercial lands – including retail and office uses
- Forecast for industrial lands

Stakeholder engagement has been a key part of this report's preparation; workshops were held early in the process to glean important insights from key groups, and the public will be engaged shortly following report submission to discuss findings and implications.

The ultimate goal of this report is to produce actionable recommendations that the District of Maple Ridge can use to craft a long-term industrial and commercial land base strategy.

## 2.0 ISSUES AND OPPORTUNITIES

While Maple Ridge is expected to see exceptional growth over the next 30+ years, and while there are a number of interesting opportunities for Maple Ridge to create new high value jobs, there are important issues that the District must address.

As part of this process two Stakeholder Workshops were organized where members of the Maple Ridge community, and people who work and do business in Maple Ridge, were brought together to share their visions for the future of District and discuss issues and changes they believed are needed to meet the demands for growth.

The main stakeholder comments revolved around the following themes:

- The need for improved transportation
  - Abernethy connector
  - Improved Transit
  - Need for an overpass to the Albion Industrial Park
- Improved development conditions
  - More assembled sites along the Lougheed Hwy
- Lack of contiguous industrial sites ready for development
  - Lack of amenities near existing industrial lands
- Demand for more commercial space in east Maple Ridge

### *Issues and Opportunities*

**Population:**

*Opportunities:*

*Issues:*

|   |  |
|---|--|
| Create a more vibrant Town Centre             | Ensure services and amenities can serve growing population.  |
| Development of Silver Valley                  | Maintain plans for rural hamlets. Slow growth will lead to pressure to alter plans.                      |
| Potential for development in the Albion area. | Both Albion Flats and Albion Industrial Park should be considered for employment land-use development. . |
|   |  |

**Employment:***Opportunities:**Issues:*

|  |   |
|--|---|
| To create more jobs so Maple Ridge residents can commute less.                       | Maple Ridge residents currently have the second longest average commute in Metro Vancouver.   |
| With a growing population, Maple Ridge can create more jobs at home.                 | Maple Ridge must ensure it has enough employment lands to meet potential growth   |
| Maple Ridge has a good base of manufacturing jobs, which are forecasted to increase. | Many of the District's manufacturing jobs are in wood manufacturing companies located in aging facilities.  |
| New educational facilities will create direct and spin-off jobs.                     | Without the development of new post-secondary educational facilities, jobs in the education sector will likely only grow with population growth.  |
| Maple Ridge can capitalize on its lifestyle to attract more businesses.              | Region must adapt to tolls on the Golden Ears Bridge. Tolls on the new Port Mann Bridge should help Maple Ridge.  |
| Over the next 30 years there will be changes to the way we work.                     | Regulations and by-laws should be flexible to allow for changes in working and business styles. By-laws regarding home-based businesses could be relaxed, as could by-laws restricting office space in industrial zones or by-laws restricting industrial space in the CS-1 zone. |

**Commercial:***Opportunities:**Issues:*

|   |   |
|---|---|
| New residential density in the Town Centre will create new commercial demand. | Commercial development on Kwantlen lands creates uncertainty regarding demand to develop in other areas.                      |
| Potential exists to develop mixed-use communities in the Albion area.         | District must balance support for the Town Centre along with the consideration for mixed-use developments in the Albion area. |
| Improved anchors in the Town Centre (Target, Thrifty's, Gaming Centre, etc.). | Additional retail anchors in the food & beverage category are still needed in the Town Centre.                                |
| Potential to develop new commercial space in East and North Maple Ridge.      | Rural hamlets in the Silver Valley will require patience.   |

|   |  |
|---|--|
| Increasing employment growth will lead to demand for office space in Maple Ridge. | Office lease rates in Maple make it difficult to warrant a standalone building. New office space will likely need to be built in mixed-use developments. |
|---|--|

**Industrial:**

*Opportunities:*

*Issues:*

|   |  |
|---|--|
| Industrial demand is moving eastward in Metro Vancouver, looking for more affordable lands.   | Maple Ridge lacks industrial lands in desirable locations. The northern industrial lands are too far away for most companies.  |
| Potential to create an employment hub with a redeveloped Albion Industrial Park, with additional jobs and services located on the Albion Flats. | Redevelopment of the Albion Industrial Park faces many constraints including infrastructure costs, and landowner expectations which are slowing both slowing consolidation. An employment hub in Albion would also impact office development in the Town Centre. |
| Application to rezone 40 acres of land south of Maple Meadows will add much needed developable land in a desirable location.                    | These lands will be the best available vacant industrial lands in Maple Ridge. Big box retail is not suggested at this site. It is recommended that the M-3 zone is amended to not include big box retail.   |
| Given that Pitt Meadows has 200 acres of lands to be absorbed, Maple Ridge has time to decide where it will find additional industrial lands.   | Locating attractive industrial lands in Maple Ridge is complicated. Options include Albion Industrial Park / Albion Flats, lands at the intersection of 232 <sup>nd</sup> and 128 <sup>th</sup> , or potentially ALR lands such as the Pelton lands.             |

### 3.0 POPULATION & EMPLOYMENT BASELINE & FORECASTS

In this section GPRA establishes both baseline and projected population and employment figures for the District of Maple Ridge, and identifies key employment trends. The projections are a crucial input for long-range land use requirement forecasting and associated policy direction, as detailed in sections 5 through 8 of this report. In undertaking this projection exercise, GPRA has made use of the best compiled information available at the time of writing.

#### 3.1 POPULATION & EMPLOYMENT ISSUES / STAKEHOLDER COMMENTS

##### *3.1.1 Population Issues*

The District of Maple Ridge is expected to grow from a population of approximately 78,000 in 2012 to over 132,000 by 2042.<sup>2</sup> This growth will have a number of significant impacts on Maple Ridge and create many possibilities for new commercial space, new jobs, and improved urban form.

This study focuses on what this growth will mean in terms of employment growth and retail/service commercial space demand, and where this growth can logically be located.

##### *3.1.2 Employment Issues*

The key issue is whether Maple Ridge can accommodate the additional employees forecast by Metro Vancouver, and where those jobs will be located. This creates issues for Economic Development regarding business recruitment to generate job growth in Maple Ridge, and real estate issues regarding the supply of employment lands. Employment lands will be discussed in later sections of this report, while this section addresses Economic Development.

##### *3.1.3 Stakeholder Feedback*

In June 2012, GPRA conducted focus groups with recognized community leaders and stakeholders in order to gain their perspectives on retail, office industrial and other issues and trend they deem important within the context of an industrial and commercial strategies study. Stakeholder comments will be discussed throughout this report; here we provide their feedback as it pertains to general employment issues.

Regarding employment growth, stakeholders recommended extending the downtown incentive program, promoting educational facility growth in Maple Ridge, and encouraging the development of a new hotel with

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<sup>2</sup> Metro Vancouver, Regional Growth Strategy Projections Population, Housing and Employment, December 2011

conference facilities downtown. Sectors that stakeholders felt had the “most potential” for employment growth were:

- Tourism
- Manufacturing
- Agro-industrial
- Film
- Sawmill infrastructure
- High Tech
- Port related sectors

### 3.2 POPULATION FORECAST

Statistics Canada’s 2011 national census recorded 76,052 residents in Maple Ridge. The District has been one of the fastest growing municipalities in Metro Vancouver over the past 10 years. Maple Ridge has added almost 13,000 new residents since 2001, which amounts to population growth of over 20%. Only Port Moody, Surrey, Pitt Meadows, and New Westminster have seen their municipalities grow at a faster rate since 2001.

**Table 1: Metro Vancouver Municipalities’ Comparative Population Growth, 2001-2011**

| Comparative Population Growth, 2001 to 2011 |                  |                  |                  | 2001 - 2006 | 2006 - 2011  | Change         |
|---|------------------|------------------|------------------|-------------|--------------|----------------|
|   | 2001             | 2006             | 2011             | % Growth    | % Growth     | 2001 - 2011    |
| Port Moody                                  | 23,644           | 27,512           | 32,975           | 16.4%       | 19.9%        | 9,331          |
| Surrey                                      | 347,821          | 394,976          | 468,251          | 13.6%       | 18.6%        | 120,430        |
| Pitt Meadows                                | 14,671           | 15,623           | 17,736           | 6.5%        | 13.5%        | 3,065          |
| Langley (DM)                                | 86,897           | 93,726           | 104,177          | 7.9%        | 11.2%        | 17,280         |
| New Westminster                             | 54,657           | 58,549           | 65,976           | 7.1%        | 12.7%        | 11,319         |
| Coquitlam                                   | 112,891          | 114,565          | 126,456          | 1.5%        | 10.4%        | 13,565         |
| <b>Maple Ridge</b>                          | <b>63,170</b>    | <b>68,949</b>    | <b>76,052</b>    | <b>9.1%</b> | <b>10.3%</b> | <b>12,882</b>  |
| Burnaby                                     | 193,955          | 202,799          | 223,218          | 4.6%        | 10.1%        | 29,263         |
| <b>Metro Vancouver</b>                      | <b>1,986,966</b> | <b>2,116,581</b> | <b>2,313,328</b> | <b>6.5%</b> | <b>9.3%</b>  | <b>326,362</b> |
| Richmond                                    | 164,346          | 174,461          | 190,473          | 6.2%        | 9.2%         | 26,127         |
| <b>Province of B.C.</b>                     | <b>3,907,739</b> | <b>4,113,487</b> | <b>4,400,057</b> | <b>5.3%</b> | <b>7.0%</b>  | <b>492,318</b> |
| P. Coquitlam                                | 51,258           | 52,687           | 56,342           | 2.8%        | 6.9%         | 5,084          |
| N. Van (city)                               | 44,093           | 45,165           | 48,196           | 2.4%        | 6.7%         | 4,103          |
| Langley (city)                              | 23,644           | 23,606           | 25,081           | -0.2%       | 6.2%         | 1,437          |
| Vancouver                                   | 545,671          | 578,041          | 603,502          | 5.9%        | 4.4%         | 57,831         |
| Delta                                       | 96,951           | 96,723           | 99,863           | -0.2%       | 3.2%         | 2,912          |
| White Rock                                  | 18,251           | 18,755           | 19,339           | 2.8%        | 3.1%         | 1,088          |
| N. Van (DM)                                 | 82,311           | 82,562           | 84,412           | 0.3%        | 2.2%         | 2,101          |
| W. Van                                      | 41,422           | 42,131           | 42,694           | 1.7%        | 1.3%         | 1,272          |

2006, 2011 Census of Canada

With this rapid rate of growth, Maple Ridge has faced the pressures that come from population growth. Difficult land-use decisions, such as those regarding the future of the Albion Flats, are a result of a fast growing community.



Issues regarding growth are expected to continue as Maple Ridge is expected to see strong population growth in the years to come. According to the most recent population projections from Metro Vancouver, the District can expect to reach 132,000 residents by 2042.

### 3.3 EMPLOYMENT IN MAPLE RIDGE / METRO VANCOUVER

Employment trends in Maple Ridge are dictated by regional trends in population growth, employment and development. Employment growth in Maple Ridge will be influenced by the economy of Metro Vancouver and the employment sectors that are growing regionally.

In December of 2011, Metro Vancouver released a study forecasting population, housing and employment for the region as a whole, and by municipality.<sup>3</sup> The findings of this study provide an indication of the population and employment growth expected in each community, providing growth targets that each municipality should be prepared to achieve.

#### 3.3.1 Employment Trends in Metro Vancouver

The following table highlights the job growth by sector for Metro Vancouver as a whole from 2001 to 2006. As 2011 employment census data has not been released, 2006 is the most recent accurate data set available.<sup>4</sup>

**Table 2: Employment by Sector, Metro Vancouver 2001 & 2006**

| Proportion of Metro Vancouver Employment by Sector |                 |     |         |     |                |
|--|-----------------|-----|---------|-----|----------------|
|  | Metro Vancouver |     |         |     | Change in Jobs |
|  | 2001            |     | 2006    |     |                |
|  | Jobs            | %   | Jobs    | %   |                |
| Business Commercial Services                       | 212,930         | 20% | 241,665 | 21% | 28,735         |
| Retail   | 116,520         | 11% | 124,960 | 11% | 8,440          |
| Health and Welfare                                 | 99,350          | 9%  | 107,065 | 9%  | 7,715          |
| Manufacturing                                      | 99,055          | 9%  | 97,800  | 8%  | -1,255         |
| Construction                                       | 53,800          | 5%  | 73,385  | 6%  | 19,585         |
| Education  | 74,480          | 7%  | 83,200  | 7%  | 8,720          |
| Finance, Insurance, Real Estate                    | 78,845          | 7%  | 85,215  | 7%  | 6,370          |
| Accommodation Food                                 | 81,555          | 8%  | 91,580  | 8%  | 10,025         |
| Transportation, Communication, Utilities           | 71,900          | 7%  | 71,305  | 6%  | -595           |
| Wholesale Trade                                    | 56,020          | 5%  | 61,650  | 5%  | 5,630          |
| Information, Cultural, Arts & Recreation           | 68,405          | 6%  | 69,495  | 6%  | 1,090          |
| Public Administration                              | 44,630          | 4%  | 44,120  | 4%  | -510           |
| Primary  | 15,525          | 1%  | 18,270  | 2%  | 2,745          |

<sup>3</sup> Regional Growth Strategy Projections: Population, Housing, and Employment 2006 - 2041; Metro Vancouver; December 2011

<sup>4</sup> These sectors are based on Statistics Canada data, and are the sectors used by Metro Vancouver. 'Technology' jobs could be either in manufacturing (software development), business services, or information sectors.

Business Commercial Services is the employment sector that provides the most jobs in Metro Vancouver. It is also the sector with the highest growth rate from 2001 to 2006.

In terms of growth rates, the other employment sectors that round out the 'top 5' growth rates from 2001 to 2006 are: Construction, Accommodation and Food, Education, Retail, as well as Health & Welfare.

Metro Vancouver saw overall job losses in Manufacturing, Transportation / Communication / Utilities, and Public Administration.

**According to the 2001 and 2006 Censuses, 34% of the Metro Vancouver labour force worked in their home municipality, and 8% of the labour force worked from home. Interestingly, 39% of females worked in their home municipality versus only 29% of males.**

### 3.3.2 Maple Ridge Labour Force

According to Census data, the Maple Ridge labour force grew by almost 13% from 2001 to 2006, implying that over 4,000 Maple Ridge residents have found employment over that time.

The table below shows Maple Ridge resident employment by category based on Statistics Canada Census data. ***These numbers indicate the types of jobs that Maple Ridge residents have, and not jobs that are located within Maple Ridge.***

Table 3: Maple Ridge Resident Employment by Sector, 2001 & 2006

| Maple Ridge Resident Employment by Sector |               |     |               |     | Change in |
|---|---------------|-----|---------------|-----|-----------|
|   | 2001          |     | 2006          |     | Jobs      |
| Business Commercial Services              | 5,260         | 16% | 5,740         | 15% | 480       |
| Retail                                    | 3,850         | 12% | 4,550         | 12% | 700       |
| Health and Welfare                        | 3,740         | 11% | 3,975         | 11% | 235       |
| Manufacturing                             | 3,610         | 11% | 3,920         | 10% | 310       |
| Construction                              | 2,580         | 8%  | 3,560         | 9%  | 980       |
| Education                                 | 2,315         | 7%  | 2,555         | 7%  | 240       |
| Finance, Insurance, Real Estate           | 2,300         | 7%  | 2,190         | 6%  | -110      |
| Accommodation Food                        | 2,065         | 6%  | 2,410         | 6%  | 345       |
| Transportation, Communication, Utilities  | 1,790         | 5%  | 2,405         | 6%  | 615       |
| Wholesale Trade                           | 1,750         | 5%  | 2,205         | 6%  | 455       |
| Information, Cultural, Arts & Recreation  | 1,675         | 5%  | 1,655         | 4%  | -20       |
| Public Administration                     | 1,665         | 5%  | 1,655         | 4%  | -10       |
| Primary                                   | 775           | 2%  | 830           | 2%  | 55        |
| <b>Total</b>                              | <b>33,375</b> |     | <b>37,650</b> |     |           |

Since 2001, the sectors that saw the largest increase in resident employment in Maple Ridge were:

- Construction with 980 new jobs
- Retail with 700 new jobs
- Transportation & Utilities with 615 jobs

- Business Commercial Services with 480 new jobs
- Wholesale Trade with 455 new jobs

It is interesting to note that while manufacturing jobs decreased in Metro Vancouver as a whole, they increased in Maple Ridge.

### 3.3.3 Residents Working in Maple Ridge

Of an estimated Maple Ridge labour force of almost 38,000 in 2006, 35.4% or 12,700 work in the District. According to Statistics Canada, the percentage of Maple Ridge residents that work in their home municipality has slightly decreased since the 2001 Census.

**Table 4: Residents Employed in Home Municipality, 2001 & 2006**

| <b>Population Employed in Municipality of Residence</b> |   |   |   |   |
|---|---|---|---|---|
|   | Total Employed<br>in Municipality<br>of Residence | % Employed<br>in Municipality<br>of Residence | Total Employed<br>in Municipality<br>of Residence | % Employed<br>in Municipality<br>of Residence |
|   | 2001  |   | 2006  |   |
| Surrey  | 63,895  | 38.1%   | 76,495  | 38.5%   |
| Maple Ridge   | 11,385  | 36.4%   | 12,715  | 35.4%   |
| Langley (DM)  | 16,405  | 35.8%   | 18,110  | 35.4%   |
| Delta   | 14,770  | 29.5%   | 16,225  | 32.0%   |
| Coquitlam   | 13,990  | 24.9%   | 16,590  | 27.9%   |
| Langley (CY)  | 2,465   | 21.2%   | 2,790   | 22.9%   |
| Port Coquitlam  | 6,075   | 22.6%   | 6,455   | 22.3%   |
| New Westminster   | 6,320   | 22.2%   | 6,530   | 20.2%   |
| Pitt Meadows  | 1,305   | 17.0%   | 1,525   | 17.8%   |
| Port Moody  | 1,800   | 14.0%   | 2,485   | 16.0%   |

While the percentage of the Maple Ridge labour force that works in Maple Ridge decreased slightly from 2001 to 2006, the absolute number of residents that work in Maple Ridge increased by almost 1,500 during that time. The only Metro Vancouver suburban municipality to have more of its own resident labour force working within its borders was Surrey, at 38.5% in 2006.

The 2006 totals of Maple Ridge’s labour force and the number of residents that work in Maple Ridge, and the estimated number of jobs in Maple Ridge are displayed below.

**Table 5: Maple Ridge Employment**

| <b>Employment in Maple Ridge 2006</b> |  |   |
|---------------------------------------|--|---|
| Labour Force<br>In Maple Ridge        | Maple Ridge<br>Residents working<br>in Maple Ridge | Estimated Total<br>Jobs in Maple<br>Ridge in 2006 * |
| 38,000                                | 12,700   | 23,000  |

Source: Statistics Canada / Metro Vancouver \*

### 3.3.4 Estimates of Employment by Type and Location, 2012

To estimate employment by type and location across the District, GPRA conducted a GIS analysis where Daytime Working Population by Dissemination Block data was merged with District-sourced geographically-coded business license data and BC Assessment's 'actual use' codes by address. Using this method, GPRA has identified a working population of over 26,000 spread across nearly 2,900 active businesses. The top three leading sectors of employment are: Manufacturing, Accommodation & Food, and Health & Welfare / Public Administration. Rounding out the top five employment categories are Business Commercial Services and Retail.

Sectors such as Agriculture and Forestry would be included in the Primary sector. Given the way Statistics Canada compiles the data, based on geocoded business data, it is possible that employment numbers for the agricultural sector are underestimated.<sup>5</sup>

**Table 6: Maple Ridge Employment by Sector, 2012**

| <b>Estimated 2012 Employment by Category in Maple Ridge</b> |                                 |                                |
|---|---------------------------------|--------------------------------|
|   | <b>Number of<br/>Businesses</b> | <b>Number of<br/>Employees</b> |
| Accomodation and Food                                       | 220                             | 3,360                          |
| Manufacturing   | 122                             | 4,420                          |
| Retail  | 430                             | 2,740                          |
| Business Commercial Services                                | 726                             | 2,970                          |
| Construction  | 502                             | 1,930                          |
| Information, Cultural, Arts & Recreation                    | 217                             | 2,220                          |
| Finance, Insurance, Real Estate                             | 230                             | 1,430                          |
| Wholesale Trade   | 76                              | 860                            |
| Health & Welfare / Public Administration                    | 181                             | 3,020                          |
| Education   | 72                              | 2,550                          |
| Transportation, Communication, Utilities                    | 52                              | 320                            |
| Primary   | 21                              | 510                            |
| <b>Total</b>  | <b>2,849</b>                    | <b>26,330</b>                  |

Source: GPRA estimates based on data from Stats Canada & District of Maple Ridge

The maps below (Figures 1 and 2) highlight primary employment locations across the District, delimited by sector. As expected, the Town Centre, Southwest Maple Ridge (specifically in the Maple Meadows Industrial Park) and the Lougheed Highway corridor are prominent. Additional density of industrial jobs can be seen in the Albion and Ruskin industrial areas.

The significant number of home based jobs – as evidenced by the distribution of data points in Figure 2 – is also notable.

<sup>5</sup> The 2009 Maple Ridge Agricultural Plan estimated that farming in Maple Ridge during 2008 paid for 9,400 weeks of agricultural labour, which would equal approximately 180 full time jobs.

Figure 1: Geographic Distribution of Employment by Sector (2012)

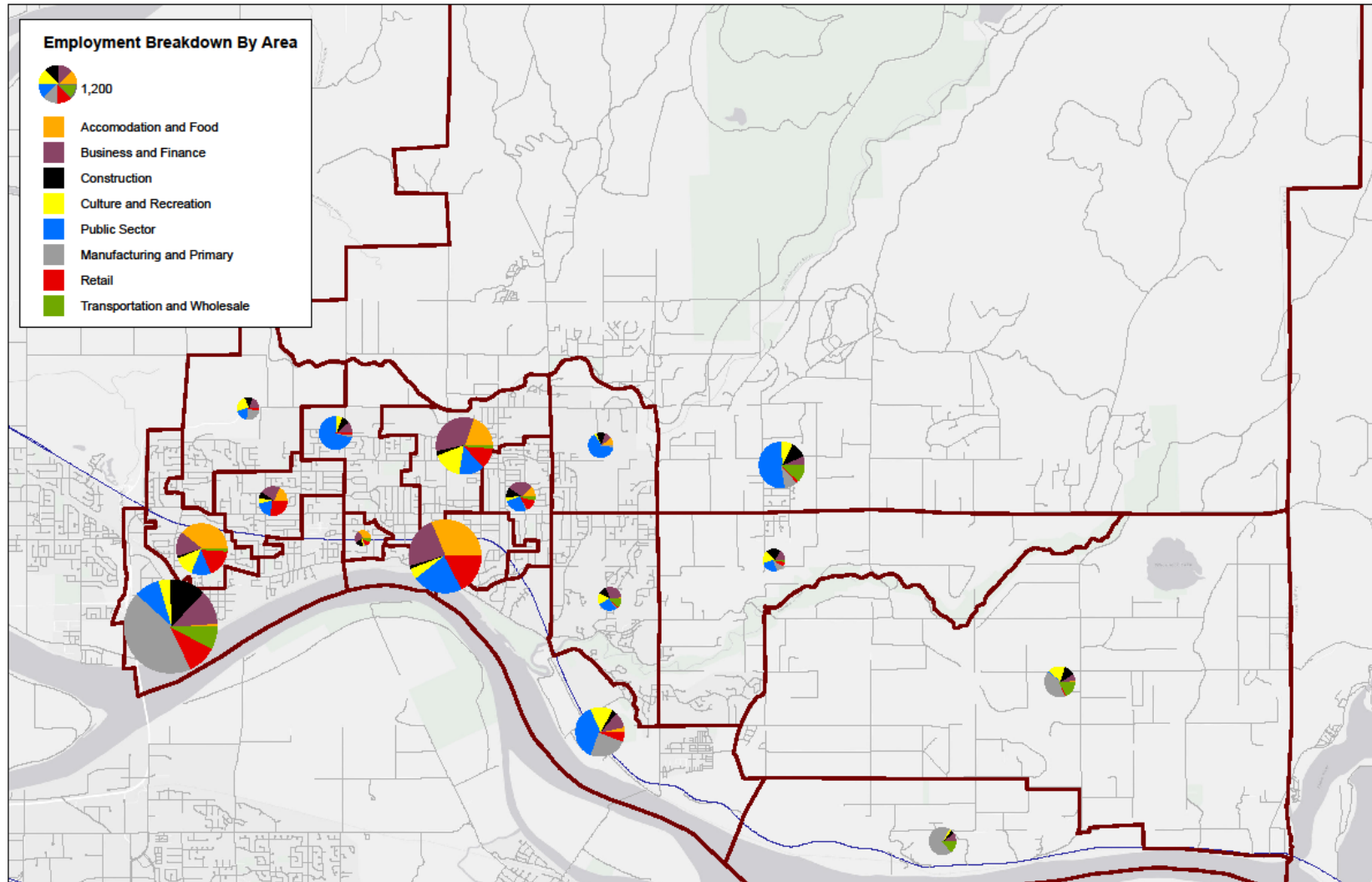
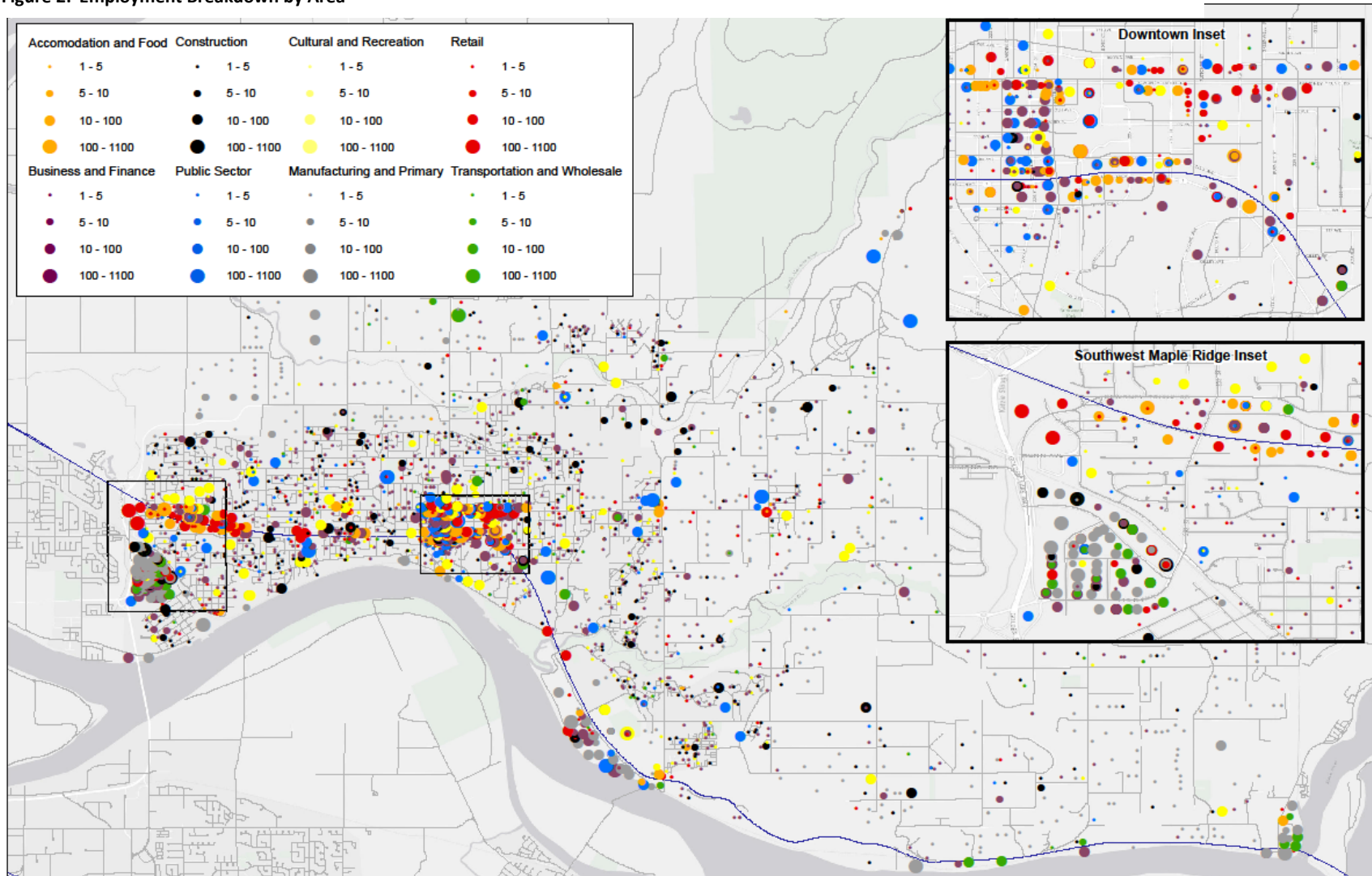


Figure 2: Employment Breakdown by Area



### 3.4 MAPLE RIDGE EMPLOYMENT FORECAST

In undertaking employment forecasting, GPRA takes as a starting point the Metro Vancouver Regional Growth Strategy's employment targets for both the region as a whole and the District specifically. Following from this, GPRA has reviewed key industry trends and shifts in the competitive landscape since these targets were compiled in 2011, ultimately producing an alternate employment projection scenario for the District.

#### 3.4.1 Metro Vancouver Municipalities' Employment Forecast

*Metro Vancouver Regional Growth Strategy Projections for Population, Housing and Employment (2011)* is the most complete study available at time of writing that forecasts job growth across Metro Vancouver as a whole and allocates those jobs by Municipality. The forecast population and employment growth by municipality is displayed below:

**Table 7: Metro Vancouver Employment Forecast by Municipality: 2006, 2021, 2041**

| Metro Vancouver Jobs Forecast by Municipality |                  |                  |                  |                  |                  |                  |                      |              |
|---|------------------|------------------|------------------|------------------|------------------|------------------|----------------------|--------------|
|   | Total Population |                  |                  | Total Employment |                  |                  | Job Growth 2006-2041 |              |
|   | 2006             | 2021             | 2041             | 2006             | 2021             | 2041             | #                    | %            |
| <b>Metro Vancouver</b>                        | <b>2,195,200</b> | <b>2,780,200</b> | <b>3,400,400</b> | <b>1,157,940</b> | <b>1,448,410</b> | <b>1,752,540</b> | <b>594,600</b>       | <b>100%</b>  |
| Anmore  | 1,900            | 2,800            | 4,400            | 300              | 660              | 1,250            | 950                  | 0.20%        |
| Belcarra                                      | 700              | 800              | 1,000            | 90               | 150              | 220              | 130                  | 0.00%        |
| Burnaby                                       | 210,500          | 277,000          | 345,000          | 136,000          | 169,000          | 203,000          | 67,000               | 11.30%       |
| Coquitlam                                     | 119,600          | 176,000          | 224,000          | 46,000           | 70,000           | 94,000           | 48,000               | 8.10%        |
| Delta   | 99,000           | 109,000          | 123,000          | 55,000           | 63,000           | 75,000           | 20,000               | 3.40%        |
| Electoral Area A                              | 11,600           | 24,000           | 30,000           | 19,000           | 20,000           | 21,000           | 2,000                | 0.30%        |
| Langley City                                  | 24,900           | 32,000           | 38,000           | 17,000           | 21,000           | 25,000           | 8,000                | 1.30%        |
| Langley Township                              | 97,300           | 146,000          | 211,000          | 49,000           | 71,000           | 100,000          | 51,000               | 8.60%        |
| Lions Bay                                     | 1,400            | 1,600            | 2,000            | 310              | 400              | 570              | 260                  | 0.00%        |
| <b>Maple Ridge</b>                            | <b>71,500</b>    | <b>95,000</b>    | <b>132,000</b>   | <b>23,000</b>    | <b>34,000</b>    | <b>48,000</b>    | <b>25,000</b>        | <b>4.20%</b> |
| New Westminister                              | 60,500           | 80,000           | 102,000          | 28,000           | 37,000           | 48,000           | 20,000               | 3.40%        |
| North Vancouver City                          | 47,500           | 56,000           | 68,000           | 29,000           | 34,000           | 40,000           | 11,000               | 1.80%        |
| North Vancouver District                      | 87,000           | 98,000           | 114,000          | 27,000           | 33,000           | 40,000           | 13,000               | 2.20%        |
| Pitt Meadows                                  | 16,600           | 22,000           | 24,000           | 5,000            | 8,000            | 9,000            | 4,000                | 0.70%        |
| Port Coquitlam                                | 54,500           | 68,000           | 85,000           | 21,000           | 28,000           | 35,000           | 14,000               | 2.40%        |
| Port Moody                                    | 28,700           | 39,000           | 50,000           | 8,000            | 13,000           | 18,000           | 10,000               | 1.70%        |
| Richmond                                      | 182,700          | 225,000          | 275,000          | 130,000          | 154,000          | 181,000          | 51,000               | 8.60%        |
| Surrey  | 413,000          | 578,000          | 740,000          | 143,000          | 217,000          | 290,000          | 147,000              | 24.70%       |
| Tsawwassen First Nation                       | 800              | 3,000            | 5,000            | 240              | 1,200            | 1,500            | 1,260                | 0.20%        |
| Vancouver                                     | 601,200          | 673,000          | 740,000          | 393,000          | 441,000          | 482,000          | 89,000               | 15.00%       |
| West Vancouver                                | 45,400           | 51,000           | 60,000           | 21,000           | 24,000           | 29,000           | 8,000                | 1.30%        |
| White Rock                                    | 18,900           | 23,000           | 27,000           | 7,000            | 9,000            | 11,000           | 4,000                | 0.70%        |

Source: Metro Vancouver

Metro Vancouver projects the number of jobs in Maple Ridge more than doubling from 2006 to 2041, growing from 23,000 to 48,000.<sup>6</sup> During the

<sup>6</sup> Note that the 48,000 job target in 2041 is based on Metro's understanding, in December 2011, of existing/established locations for sector employment and the

same period, the population of Maple Ridge is expected to grow from 71,500 (already nearly 80,000 today) to 132,000.

Based on RGS employment forecasts, the District of Maple Ridge is expected to increase its share of Metro Vancouver employment from 2% in 2006 to 2.7% by 2041. To achieve this RGS target, Maple Ridge will need to attract 4.2% of new jobs in Metro Vancouver over that period.

As displayed in Table 4, over 35% of Maple Ridge residents work in Maple Ridge, and by 2041 Metro Vancouver forecasts this percentage to be 36.4%. Therefore, Maple Ridge only needs to increase jobs at the same rate as population growth to meet these targets.

Some important aspects of the Metro report include:

- The forecast jobs per municipality include residents who have jobs with 'no fixed place of work' as well as those that work from home.
  - As of 2006, 14% of the Maple Ridge labour force had 'no fixed place of work'.
  - Forecasted jobs per Municipality also include home based jobs, which accounted for 8% of the Maple Ridge labour force in 2006.
  - Together jobs with 'no fixed place of work' and those who work from home account for 21% of the labour force in Maple Ridge or almost 7,700 jobs. GPRA expects these percentages to remain constant as they have remained constant in recent Censuses.
- Regarding sectors expected to grow, the Metro Vancouver report forecasts a shift from goods producing industries to service industries.
  - 55% of job growth is expected to come from business & commercial Service, Finance / Insurance / Real Estate (FIRE), retail, etc.
  - 23% of job growth is expected to come from health, education and public administration.
  - 21% of job growth is expected to come from manufacturing, transportation, wholesale trade and construction.
  - Only 1% of job growth is expected to come from primary industries.
- Employment growth in most categories is strongly correlated with population growth. However, employment growth in some categories is more dependent on quality of location rather than

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availability of employment lands in each of Metro's municipalities. As major changes in land availability and infrastructure occur (for example, recent ALR exclusion of North Lougheed lands in Pitt Meadows), forecasts will be revised.



size of local population. Manufacturing serves as a prime example. Manufacturing jobs are often considered of particular value to communities because they provide well-paid positions, important tax revenues, and are not as tied to population growth as other categories. This is due to the fact that in general manufacturing companies serve a larger market than the adjacent neighbourhood, municipality or region. A very macro example would be that auto manufacturing jobs will not increase in Metro Vancouver as a result of population growth. Those jobs are located elsewhere.

**In order for Maple Ridge's employment numbers to increase at a rate higher than its population growth, attracting categories such as manufacturing will be important. It is expected that for employment growth to surpass population growth, business services will also increase. Business services only represent an estimated 11% of the jobs in Maple Ridge and almost 20% for the region.**

### *3.4.2 Maple Ridge Employment Forecast by Sector*

Forecasting employment is very helpful and necessary for long range land use planning, however forecasts themselves are based on a number of potentially volatile assumptions. It is difficult to predict cycles in the economy as well as changes in the way people work; this difficulty expands exponentially the more distant in the future we try to forecast.

Based on our review of the assumptions underpinning Metro Vancouver's municipal jobs forecasts, as well as our understanding of emerging regional employment land dynamics (particularly those that have come about since Metro's publication of municipal employment projections in 2011), GPRA takes the view that Metro's employment targets should be regarded as a 'high' growth projection scenario and thus should be complemented by a second more conservative forecast scenario. GPRA has thus compiled a second, conservative growth scenario for the District, in which we adopt Metro Vancouver's sector-specific forecasts for the region overall and subsequently revise Maple Ridge allocation figures. Both forecast scenarios are presented in Table 8 below.

- Baseline jobs, 2012: 26,300
- *Metro Vancouver Scenario, 2041*: 48,000 (2.1% annual growth)
- *GPRA Scenario, 2041*: 42,500 (1.7% annual growth)

**Table 8: Sector Specific Employment Forecast for Maple Ridge to 2041**

| <b>Estimated Employment Growth by Category in Maple Ridge to 2041</b> |                         |                         |                     |                          |                     |
|---|-------------------------|-------------------------|---------------------|--------------------------|---------------------|
|   | <b>Jobs in<br/>2012</b> | <b>Metro Forecast</b>   |                     | <b>GPRA Low Scenario</b> |                     |
|   |                         | <b>Jobs in<br/>2041</b> | <b>New<br/>Jobs</b> | <b>Jobs in<br/>2041</b>  | <b>New<br/>Jobs</b> |
| Accommodation and Food  | 3,400                   | 5,300                   | 1,900               | 5,100                    | 1,700               |
| Manufacturing   | 4,400                   | 6,600                   | 2,200               | 5,900                    | 1,500               |
| Retail  | 2,700                   | 5,000                   | 2,300               | 4,600                    | 1,900               |
| Business Commercial Services  | 3,000                   | 5,700                   | 2,700               | 4,800                    | 1,800               |
| Construction  | 1,900                   | 4,000                   | 2,100               | 3,600                    | 1,700               |
| Information, Cultural, Arts & Recreation                              | 2,200                   | 3,800                   | 1,600               | 3,200                    | 1,000               |
| Finance, Insurance, Real Estate                                       | 1,400                   | 3,400                   | 2,000               | 2,900                    | 1,500               |
| Wholesale Trade   | 900                     | 2,400                   | 1,500               | 1,800                    | 900                 |
| Health & Welfare / Public Admin                                       | 3,000                   | 5,100                   | 2,100               | 4,800                    | 1,800               |
| Education   | 2,600                   | 4,800                   | 2,200               | 4,500                    | 1,900               |
| Transportation, Communication, Utilities                              | 300                     | 1,000                   | 700                 | 600                      | 300                 |
| Primary   | 500                     | 900                     | 400                 | 700                      | 200                 |
| <b>Total</b>  | <b>26,300</b>           | <b>48,000</b>           | <b>21,700</b>       | <b>42,500</b>            | <b>16,200</b>       |

Source: GPRA, HBLG Estimates based on data from Stats Canada & District of Maple Ridge

The sectors expected to see the largest job growth in Maple Ridge are Business & Commercial Services, Retail, Manufacturing, Education, as well as Health & Welfare / Public Administration.

Other sectors expected to see significant job growth include Construction, FIRE, and Accommodation / Food.

### 3.5 EMPLOYMENT TRENDS BY SECTOR <sup>7</sup>

The following section reviews the trends of business sectors that are major users of industrial lands in Metro Vancouver, and potential sources for employment in Maple Ridge.

#### 3.5.1 Primary Sectors

- The Primary Sector historically would have been dominated by the Forestry sector in the Lower Mainland; however now the largest sub-sector is agriculture.
- Forestry and agriculture are important areas for jobs in this sector in Maple Ridge.
- It was estimated that there were 500 jobs Primary Sector jobs in Maple Ridge in 2012, and this is forecast to increase to 900 by 2041.

##### **Trends**

- Eating locally is becoming increasingly important for people in Metro Vancouver and will result in growing agricultural and agro-industrial jobs.
- Growth in agro-industrial jobs are expected, but the total number of new jobs are forecast to be small. Employment in this sector will

<sup>7</sup> The employment sectors used are the same used by Metro Vancouver.

Technology jobs, for example, could be found in Manufacturing, Information / Cultural / Arts, as well as Business Commercial Services.

continue to include an important component of seasonal and part-time jobs.

- Significant agriculture and agro-industrial growth in the region will likely involve public involvement, including support for small farmers, and will not be solely market driven.
- According to the 2008 Maple Ridge farming census, in 2008 Maple Ridge farmers paid for 9,400 weeks of labour or approximately 180 full-time equivalent jobs.
- A Working Farm School to teach the business of farming and agro-tech has been proposed for Maple Ridge. The Economic Development office and District should promote this school. A location close to retail and industrial land would be ideal to promote potential growth and spin off benefits.
- OCP policies seek to preserve agriculture lands, a key factor in fostering growth in this sector.

### 3.5.2 *Construction*

- It is estimated that 1,900 jobs were in the Construction Sector in Maple Ridge in 2012, and could grow up to 4,000 by 2041.
- Maple Ridge has a higher proportion of Construction sector jobs than the region, and this is expected to continue through 2041.
- Land use is dominated by contracting companies which prefer light industrial locations with outside and indoor storage for equipment, tools, and vehicles. The trucks used are usually vans or pick-up trucks.
- Approximately 10% of companies, such as vendors of concrete and rebar, require heavy industrial land which is often located on the waterfront.

#### ***Trends***

- Land use by the construction sector has not seen increases in efficiency, but companies have moved east, following cheaper lands and residential development.
- The use of industrial land by the Construction Sector in Maple Ridge is currently not very efficient, which is not uncommon for this sector throughout the region. Land use efficiency by the construction sector is expected to improve slightly by 2041 as industrial land values in Maple Ridge increase.
- The demand for industrial land, and job growth in this sector, should mirror the growth in the construction sector, and this growth is closely related to both the economy of BC and regional population growth.
- Waterfront locations in Maple Ridge could be used for the storage or transportation companies that ship materials up and down the Fraser River.

- Given Maple Ridge is expected to see significant population growth and residential development, the construction sector in Maple Ridge should see similar growth in construction jobs.

### 3.5.3 *Manufacturing*

- The Manufacturing Sector in Maple Ridge is estimated to employ 4,400 people in 2012. Jobs in this sector could grow up to 6,600 by 2041.
- It is important to attract manufacturing companies because they are not influenced by population growth, and therefore are key to increasing the jobs per population ratio.

#### **Trends**

- Manufacturing jobs in Maple Ridge split into three broad camps:
  - Wood manufacturing: Typically located in older buildings. Will see job growth, but less demand for new facilities.
  - Food manufacturing: The agro-industrial sector is expected to grow due to local demand, but this sector likely needs support from Municipal and Provincial Governments.
  - All other companies: Most likely smaller scale manufacturers. Larger companies should be the targeted, though small owner-operated businesses could also provide significant employment growth.
- It is estimated that almost 50% of the manufacturing jobs in Maple Ridge are from the wood products / forestry sector. Many of these businesses are based in aging buildings, and it can be tempting to suggest that these lands are ripe for redevelopment; however, it should be recognized that these jobs are important for the community.
- In general the manufacturing sector is going through dramatic changes including smaller production runs and increased customization and higher value-added processes which reduce demand for land.
- These changes will result in smaller production floors, growing requirement for mixed-use lands with office space, as well as an increased importance on locations with easy access for just-in-time shipments of materials / finished products.
- Smaller production runs, and value-added processes will protect Canadian manufacturers from currency fluctuations.
- Maple Ridge's high proportion of manufacturing jobs comparative to other municipalities is in large part due to its lower industrial land values, historical location for wood product companies, and the attractive lifestyle available to owner-operators. This is expected to continue.

### 3.5.4 Wholesale Trade

- The Wholesale Trade sector is estimated to include 900 jobs in 2012, and forecasted to include almost 2,400 jobs by 2041.
- Maple Ridge has lower than the regional average of wholesale sector jobs, most likely do to access issues, but with population increase and tolls on the Port Mann Bridge, this sector is expected to see higher growth than the region as a whole.

#### **Trends**

- Companies that service the downtown core are less likely to move eastward.
- As a result of remaining in some of the most expensive industrial land in the region, the wholesale sector has had to make much more efficient use of their space. Enhanced racking systems and 'just-in-time' deliveries are increasingly used by this sector to improve efficiency.
- Larger wholesalers looking for cheaper land, with easy access to the US border, as well as companies servicing populations in east Metro Vancouver could look to locate in Maple Ridge.
- Congestion is an issue for the wholesale sector, so access to quality transportation networks is critical for attracting these companies.

### 3.5.5 Retail Trade

- It is estimated that Maple Ridge has 2,700 jobs in the retail sector, with employment expected to grow to 5,000 by 2041.
- Retail development and employment typically follows population growth.
- Areas that become a regional retail destination will have a higher proportion of retail employment.

#### **Trends**

- Retail in Maple Ridge's Town Centre will improve and grow with an increased population and improved anchors, such as Target, Thrifty's and the new Gaming Centre.
- Traditional Town Centres provide a positive pedestrian experience, and can become regional draws for retail expenditure.
- Recent regional retail development has focussed either on providing big-box formats for large retailers, or pedestrian oriented developments that focus on providing a positive consumer experience.
- As the region becomes denser, some projects are combining big-box retailers with a pedestrian element. Park Royal Village as well as the Canadian Tire and Best Buy are good examples of this trend.
- Retail development on industrial lands is decreasing as the importance of the industrial land base becomes evident to local governments. To strengthen this trend in Maple Ridge, it is recommended later in this report that big box retail is removed as an allowable use on M-3 zoned lands.

### 3.5.6 *Transportation, Communication, Utilities<sup>8</sup>*

- These sectors were estimated to include 300 jobs in 2012, and could increase to over 1,000 by 2041.
- Within Metro Vancouver 70% of goods are moved by truck. Difficulty to access Maple Ridge likely kept these jobs away from the District historically, but that should change over time with the new Golden Ears Bridge and tolls on the Port Mann Bridge.
- Growth in these sectors will be typically based on population growth, traffic network improvements, and increased traffic at the Port of Vancouver.

#### **Trends**

- Traffic congestion is huge issue for this sector. Some companies have considered leaving the region, and all are awaiting the completion of the Gateway project.
- Companies that do not require a location next to the airport or ports have been moving eastward to take advantage of cheaper rates and available lands.
- With the improved bridges Maple Ridge could become a more regionally important location for Transportation and Warehousing companies, although they would want to be located in southwest Maple Ridge.
- Increased activity of the Pitt Meadows Regional Airport could lead to transportation related jobs.

### 3.5.7 *Film, Publishing, Information, Culture*

- Film, Publishing, Information, and Culture sectors are estimated to have 2,200 employees in Maple Ridge in 2012. These sectors could expand to include 3,800 jobs in Maple Ridge by 2041.
- Land use by the film sector is dominated by studios, though office space is used by producers, animators and editors.

#### **Trends**

- There is demand for more studio space in the region, and due to the tax credit for filming that occurs east of 200<sup>th</sup> Street industry insiders suggest that a new studio could be developed in Langley, Maple Ridge or Pitt Meadows to take advantage of the tax incentive.
- With the rise in the Canadian dollar in recent years the tax incentives introduced by the Provincial Government are considered critical in attracting film productions.
- Publishing and other art and cultural jobs are expected to grow with population. Employment in these sectors is expected to grow slightly slower in Maple Ridge than the region.

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<sup>8</sup> These sectors were combined in the Metro Vancouver employment study, and were combined in this study to maintain continuity.

### 3.5.8 Finance, Insurance and Real Estate (FIRE)

- The FIRE sectors are estimated to have 1,400 jobs in Maple Ridge in 2012. FIRE is forecasted to have 3,400 jobs as of 2041.
- These jobs are typically expected to go at the rate of population, but due to the low number of jobs in Maple Ridge in 2012, it is expected that job growth in FIRE will exceed population growth.
- Typically cluster in commercial hubs, but will locate where the population is.

#### **Trends**

- More FIRE businesses have been moving from Vancouver and locating in the suburbs to be closer to their clients.
- This sector has been one of the more important sectors pushing for new suburban office space in Surrey and Langley.
- As the Maple Ridge Town Centre becomes more vibrant it will attract more businesses from this sector in office space.

### 3.5.9 Business & Commercial Services

- These sectors employ an estimated 3,000 people in Maple Ridge in 2012, and could grow to employ 5,700 people by 2041.
- Would include a broad spectrum of businesses that are typically knowledge based.
- One of the fastest growing sectors in Metro Vancouver that is expected to continue to grow.

#### **Trends**

- The North American and Metro Vancouver economy is forecasted to become more service oriented. Maple Ridge currently has a low proportion of Business & Commercial Services jobs, so this sector could be expected to grow faster than population growth.
- Many of these businesses are home-based, but a vibrant Town Centre would likely attract businesses to Maple Ridge.

### 3.5.10 Education

- The educational sector employs an estimated 2,600 people in Maple Ridge, and it is forecasted the sector could employ approximately 4,800 people in 2041.
- Institutional employment that also creates a significant number of spin-off service sector jobs.
- Predominantly Education jobs grow at the rate of population, but private education is a growing sector, and these institutions can cause jobs to grow at a faster rate than population growth.

#### **Trends**

- Throughout BC there has been increasing development of new post-secondary facilities in recent years. Many of these facilities

have been developed by Community Colleges, some of which are now designated as Universities.

- There is discussion of two new post-secondary developments in Maple Ridge including a Business Innovation Accelerator that would focus on technology, agriculture and tourism, as well as a Working Farm School to teach business of farming and agro-tech.

### *3.5.11 Health & Welfare*

- The Health & Welfare sector is estimated to employ 3,000 people in 2012, and is forecasted to employ 5,100 people in 2041.

#### **Trends**

- As the population grows employment in the Health & Welfare sector will grow. An aging population will also increase jobs in Health & Welfare.
- Health and beauty products are also one of the fastest growing categories of retail, but that would not be included in this sector.

### *3.5.12 Accommodation & Food*

- The Accommodation and Food sector employs an estimated 3,400 people in 2012, and is forecasted to employ up to 5,300 by 2041.
- Accommodation and Food can be expected to grow in comparison with population.

#### **Trends**

- Since Maple Ridge is underserved with restaurants, it is possible that this sector will grow faster than population as the Town Centre and other regional centres gain critical mass to add new food options.
- Development of new hotels has increased in the eastern municipalities of Metro Vancouver. Maple Ridge will likely add a new hotel over the study period.
- Increased activity and awareness of the Pitt Meadows Regional Airport could aid demand for hotel space in Maple Ridge.



### 3.6 LAND REQUIRED FOR NEW EMPLOYMENT

The employment forecasts created allowed for estimates to be made on the types of buildings and land uses that new jobs would require. Employment by the various categories was split between different types of office, retail, industrial, and institutional building typologies along with their standard site coverage, density, and expected employment density. Home based jobs, and jobs with no fixed address were expected to remain at 20%, their current level. The following table displays the forecasted new jobs by building typology.

**Table 9: New Jobs by Estimated Building Typology**

| <b>Building Typology of New Jobs in Maple Ridge</b> |                                     |   |
|---|-------------------------------------|---|
|   | <b>Metro Vancouver<br/>Forecast</b> | <b>Lower Employment<br/>Growth Scenario</b> |
| <b>Retail</b>                                       | 4,100                               | 3,500                                       |
| <b>Institutional</b>                                | 3,000                               | 2,400                                       |
| <b>Industrial</b>                                   | 5,800                               | 4,300                                       |
| <b>Office</b>                                       | 4,400                               | 2,800                                       |
| <b>Home Based</b>                                   | 4,400                               | 3,200                                       |

Source: GPRA, HBLG Forecast

Table 10 presents land demand estimates based on each of the two employment projection scenarios.

**Table 10: Maple Ridge Land Required for Projected Jobs**

| <b>Land Required for Forecasted Jobs by 2041</b> |                                     |                                     |   |   |
|--|-------------------------------------|-------------------------------------|---|---|
|  | <b>Metro Vancouver<br/>Forecast</b> | <b>Metro Vancouver<br/>Forecast</b> | <b>Lower Employment<br/>Growth Scenario</b> | <b>Lower Employment<br/>Growth Scenario</b> |
|  | <b>Acres</b>                        | <b>Hectares</b>                     | <b>Acres</b>                                | <b>Hectares</b>                             |
| <b>Retail</b>                                    | 110                                 | 45                                  | 100   | 40  |
| <b>Institutional</b>                             | 80                                  | 32                                  | 70  | 28  |
| <b>Industrial</b>                                | 230                                 | 93                                  | 170   | 69  |
| <b>Office</b>                                    | 50                                  | 20                                  | 30  | 12  |

Source: GPRA, HBLG Forecast

Future densities are difficult to forecast. However, recent studies indicate industrial land utilization is not forecast to see significant gains in employment or development densities on industrial lands in the short term.<sup>9</sup>

Dramatic changes in the way people work over the next 30 years can be expected. Increases in home based employment, and employment with no fixed address could potentially occur as more people rely on technology for work.

<sup>9</sup> Metro Vancouver, Industrial Land Intensification Analysis, Eric Vance & Associates, 2011

### 3.7 STRATEGIES FOR MAXIMIZING FUTURE EMPLOYMENT

#### *3.7.1 Invest Maple Ridge – Economic Development Office*

The Economic Development office in Maple Ridge, through their Invest Maple Ridge marketing program, is using traditional economic development strategies including forming strategic partnerships, as well as targeted marketing and communications to help grow the Maple Ridge economy.

Invest Maple Ridge gets direction from the Maple Ridge Council, and from the Economic Advisory Commission (EAC), which has 12 members, including 3 Councillors, 6 members at large, and 3 community liaisons.

Specific goals of Invest Maple Ridge include:

- Attract commercial & industrial investment
- Create high value local jobs
- Promote the quality lifestyle of Maple Ridge
- Promote business retention in Maple Ridge
- Attract investment in the Town Centre

The goal of creating high value local jobs has led to a process of reviewing each priority economic sector to outline strategies for growth. So far this process has completed a review of the Tourism sector, and is currently reviewing the Education sector, with a review of Agriculture to begin in 2012.

- The review of the Tourism sector indicated there is significant potential for growth, but Maple Ridge requires more hotel rooms and meeting facilities.
  - Economic Development has been pursuing potential hotel investors / developers, and there is a proposed project now at 224 & Dewdney.
- Within Education sector there is the potential for the development for a new facilities including a Business Innovation Accelerator, a Green Building Technology Centre, as well as a Working Farm School.

The goal of attracting investment in the Maple Ridge Town Centre has resulted in the Town Centre Investment Incentive Program. This incentive program has been very well received and was awarded the 2012 Marketing Program of the Year by the Economic Developers Association of BC. The incentive program includes:

- Temporary Tax exemptions and reduced permit costs
- Priority processing from District Staff
- Incentives / grants for façade improvements and commercial renovations

- Increased allowable density

The incentive program has reportedly resulted in 320 new residential units in 6 comprehensive multi-family developments. It is believed that similar incentive programs might assist the District in meeting its job growth goals. For example, one particular target area would be the promotion of land consolidation along with development along the Lougheed corridor.

For the District to meet its job growth goals, similar incentive programs might need to be established to promote development and consolidation on industrial lands and along the Lougheed Corridor.

By focusing on developing the Town Centre, attracting educational institutions to build new locations and major businesses to the area Invest Maple Ridge is being effective in attracting new jobs to the District.

### 3.8 RECOMMENDED STRATEGIES TO PROMOTE EMPLOYMENT GROWTH

#### 3.8.1 Regulatory

- Consideration should be given to the fact that the faster Maple Ridge's population grows the more jobs it needs to create to keep the job to population ratio.
- Continue to promote / allow home-based businesses. Maple Ridge has one of the higher percentages of residents that work in their home municipality (see Table 4), but has an opportunity to strengthen support home-based businesses. Regulations governing home-based businesses should be relaxed. In rural areas, regulations governing home-based businesses are based on lot areas, these regulations should be reviewed.
- Maintain regional competitiveness regarding industrial and commercial tax rates.

Table 11: Comparative Tax Rates by Municipality

| Comparative Tax Rates by Municipality |                              |                              |
|---------------------------------------|------------------------------|------------------------------|
| 2011 Rates                            |                              |                              |
|                                       | Light Industrial<br>Tax Rate | Business & Other<br>Tax Rate |
| Surrey                                | 6.6073                       | 7.41846                      |
| Langley City                          | 9.2424                       | 8.8727                       |
| Langley Twnshp                        | 9.7807                       | 9.6238                       |
| <b>Maple Ridge</b>                    | <b>12.1045</b>               | <b>12.1045</b>               |
| Coquitlam                             | 12.3135                      | 14.7825                      |
| Port Coquitlam                        | 13.3124                      | 12.1766                      |
| Pitt Meadows                          | 15.0137                      | 12.6713                      |

#### 3.8.2 Marketing

- Promote the District as one of the fastest growing municipalities in the region as well as its lifestyle and affordable housing / land to

prospective businesses. ‘Lifestyle’ attributes that would attract businesses to Maple Ridge include the proximity to nature, healthy Town Centre, affordable housing, and quality community facilities.

- Continue to promote Maple Ridge along with Pitt Meadows and Mission, as the ‘North of the Fraser’ communities.
- Focus business attraction on manufacturing, technology as well as partnerships with new educational institutions.

### 3.8.3 *Town Centre*

- Extend the Town Centre incentive program beyond 2013. A vibrant Town Centre will create more retail jobs and attract more businesses to Maple Ridge.
  - A hotel in the Town Centre will help attract more tourists as well as meetings / events and tournaments to Maple Ridge.
- Encourage office development in Town Centre.
- Promote an ‘executive business centre’ in the Town Centre. Such a facility could act as a business incubator while also providing ‘hot desks’ and office amenities for home based businesses.
- Continue to support new cultural events (such as free concerts, open air movies, etc.) in the Town Centre to bring more people to the area.
- Key retail tenants have a huge impact on perception. Promote popular tenants, such as Earls, Cactus Club, Joey, Milestones, Nuba, etc. to locate in Maple Ridge.
- Continue to promote an improved streetscape in the Town Centre.
- Promote food carts in the Town Centre to animate Memorial Peace Park and other public spaces in the Town Centre.

### 3.8.4 *Tourism*

- Promote hotel development in the Town Centre, preferably with meeting room facilities.
- Utilize the Fraser River and the Albion Ferry terminal for tourist activities. A study was done for the District of Maple Ridge that looked at creating a tourist visitor centre at the Albion Ferry Terminal.<sup>10</sup>
- Develop eco-tourism opportunities, potentially with guiding operations based at a new tourist visitor centre at the old Albion Ferry terminal.
- Look at attracting tournaments and events to locate in Maple Ridge.

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<sup>10</sup> Maple Ridge / Pitt Meadows Visitor Centre Feasibility Study, IBI Group, July 2010.

- Review potential fringe sports that are already popular in Maple Ridge and other sports tourism possibilities.

### *3.8.5 Business Retention & Attraction*

- Continue to support the Economic Development office.
- Retaining businesses is the same as attracting a new business.
- Work with new Business Innovation Accelerator to promote entrepreneurs to locate in Maple Ridge.
- Manufacturing and Information / Cultural jobs are less tied to population growth and should be promoted.
- Use jobs estimate in Maple Ridge as a baseline to track changes in employment by sector.

### *3.8.6 Industrial Promotion*

- Promote northern industrial sites for those looking for affordable lands.
- Promote flexibility of uses on industrial lands, not including big box retail.

### *3.8.7 Infrastructure Enhancement*

- Work with Translink to promote development of Abernethy Connector, and improved transit in Maple Ridge.
- Look at feasibility of creating additional wireless hotspots in the Town Centre.
- Capitalize on regional infrastructure investments to attract businesses to Maple Ridge.
- Revisit the potential for a Westcoast Express station at Albion if the area is to be redeveloped.

### *3.8.8 Education*

- Promote the development / expansion of educational facilities including:
  - Business Innovation Accelerator
  - Working Farm School
  - Green Technologies Centre

## 4.0 COMMERCIAL LANDS: ISSUES AND INVENTORY<sup>11</sup>

### Highlights:

- District working to build balanced community and neighbourhoods, with stronger commercial base and better opportunities to spend within the community;
- Built Inventory: 2.4 mil sq.ft. retail/ service commercial
- Land Inventory: 445 acres designated commercial lands
- Zoned Land Inventory: 346 acres of zoned commercial lands

As part of the vision of creating a complete community, Maple Ridge residents have expressed a strong desire to increase the retail and service options they have in their community. Through stakeholder engagement, along with informal conversations with residents and business owners, it became clear that residents have a strong desire for more comparison shopping opportunities, brand-name restaurant space, a vibrant cultural and entertainment destination in the Town Centre, and generally less need to travel west or south to find goods and services that they desire.

GPRA has conducted a detailed retail and service commercial assessment for the District (**Sections 4, 5 and 6** of this report), including a review of the commercial lands inventory (designated and zoned), current commercial expenditures, ‘outflow’ of expenditures, projections of future demand under a variety of scenarios, and how demand will likely be allocated by area with associated land use implications. This analysis culminates in a series of options, opportunities and recommendations for how the District may proceed with its commercial lands strategy in the coming decade and beyond.

This section provides an overview of issues and land/built space inventory by area.

### 4.1 COMMERCIAL ISSUES / STAKEHOLDER COMMENTS

#### 4.1.1 Commercial Issues

The District of Maple Ridge is in the midst of a multi-year effort to strengthen and incent growth and vibrancy in the Town Centre. Reinforcing the Town Centre as the primary destination business,

<sup>11</sup> Note that Sections 4, 5 and 6 address “Commercial Land” and associated demand insofar as they pertain to **RETAIL and SERVICE COMMERCIAL** in retail environments. Other aspects of commercial development (i.e. Office space demand and land requirements) are addressed in Section 7.

entertainment and shopping district in the municipality is considered a primary goal for Maple Ridge.

Strengthening the Town Centre is part of the broader strategic commercial planning goals and principles outlined in the OCP which are designed to help achieve a balanced, complete community. The District hopes to reinforce the “development of a network of mixed use urban activity centres” which include:

- The Town Centre as the area of central focus for business, culture and entertainment;
- A hierarchy of ‘lower order’ commercial centres based on the needs of the local population, to promote compactness, community identity, transit, and commercial activity;
- Promotion of a pedestrian friendly Town Centre surrounded by high density and other infill.

The OCP also explicitly calls for the undertaking of a commercial and industrial lands strategy (OCP, 6-4).

From this work, the District will have a more complete understanding of commercial land availability, land requirements, and strategic areas to focus future growth.

#### 4.1.2 Stakeholder Comments

The stakeholder workshops conducted by GPRA and HB Lanarc-Golder in June 2012 brought forward the following concerns, wants, and recommendations regarding commercial planning and development. These were kept in mind when conducting the ensuing analysis and developing recommendations:

- *Commercial in the East:* Further commercial development in the East would, it was suggested, be able to coexist with a strong, vibrant downtown. Expanded residential in the core will, it is thought, be the primary supportive elements for more downtown retail.
- *Marketing:* Focus on marketing and planning commercially ‘themed’ areas (e.g. promoting downtown as the ‘cultural heart’ or ‘center of boutique commercial.’)
- *Waterfront:* Bring modern mixed-use, with retail components, to underutilized waterfront lands.
- *New Tenants:* Promote ‘urban box’ type retail development (i.e. national retailers in smaller footprints integrated into town centre pedestrian network). Also promote restaurant development downtown.
- *Incentives:* Extend Town Centre incentives package beyond 2013 to keep up positive momentum.

- *Embrace Opportunity*: do not reject opportunities to bring large retailers (e.g. Wal-Mart) to the community. Instead, manage the opportunity, encourage progressive development, work with proponents to build strong community.
- *Conference/Hotel/*: continue to invest in incentives that will bring, in the medium-long term, lead to development of new hotel and conference space.
- *Approvals*: Speed up the approvals process (rezoning, development permits, subdivision approvals and building permits).<sup>12</sup>

## 4.2 COMMERCIAL FLOOR AREA & LAND INVENTORY

The District-wide commercial inventory provides a snapshot of both built retail and service commercial floor area and land supply.

### 4.2.1 District-Wide Commercial Floor Area & Land Supply

Maple Ridge today is home to approximately 2.4 million square feet of retail and service commercial floor area, including health service and financial/legal service space located in shopping centres and along street-fronts. This space inventory breaks down by category as shown at right:

| <b>Maple Ridge Commercial Inventory, 2012*</b> |                    |
|--|--------------------|
| <b>Retail Categories</b>                       | <b>Square Feet</b> |
| <b>Convenience Goods &amp; Services</b>        | <b>944,000</b>     |
| Grocery & Specialty Food                       | 296,500            |
| Pharmacy                                       | 21,900             |
| Alcohol & Tobacco                              | 44,800             |
| Health Services                                | 242,900            |
| Financial & Legal Services                     | 139,700            |
| Other Services                                 | 198,200            |
| <b>Comparison Goods</b>                        | <b>804,700</b>     |
| Apparel  | 126,700            |
| Footwear & Fashion Accessories                 | 12,000             |
| Cosmetics, Health, Bath & Beauty               | 40,200             |
| Jewelry & Accessories                          | 35,000             |
| Home/Portable Electronics & Appliances         | 39,000             |
| Multimedia, Books & Music                      | 42,300             |
| Home Furnishings & Accessories                 | 141,000            |
| Home Improvement                               | 253,300            |
| Toys / Hobbies / Pets                          | 92,700             |
| Sporting & Recreational Goods                  | 22,500             |
| <b>Food &amp; Beverage</b>                     | <b>329,200</b>     |
| Restaurants                                    | 274,100            |
| Alcohol Sales - Pubs / Lounges / Restaurants   | 55,100             |
| <b>Entertainment &amp; Leisure</b>             | <b>141,700</b>     |
| Movies   | 0                  |
| Leisure & Recreation                           | 141,700            |
| <b>Automotive Goods &amp; Services</b>         | <b>188,900</b>     |
| <b>Total</b>                                   | <b>2,408,500</b>   |

\*District Inventory, categorized by GPRA

<sup>12</sup> A recent survey from the Commercial Real Estate Development Association ranked Maple Ridge in last place out of 20 Lower Mainland municipalities in terms of approval timing in 2012. A previous survey conducted in 2010 had ranked Maple Ridge mid-pack.



Data from the District indicates that the municipality has 445 acres of OCP designated commercial lands and 346 acres of zoned commercial lands. The approximate breakdown of zoned commercial by zoning type is shown in Table 11 at right.

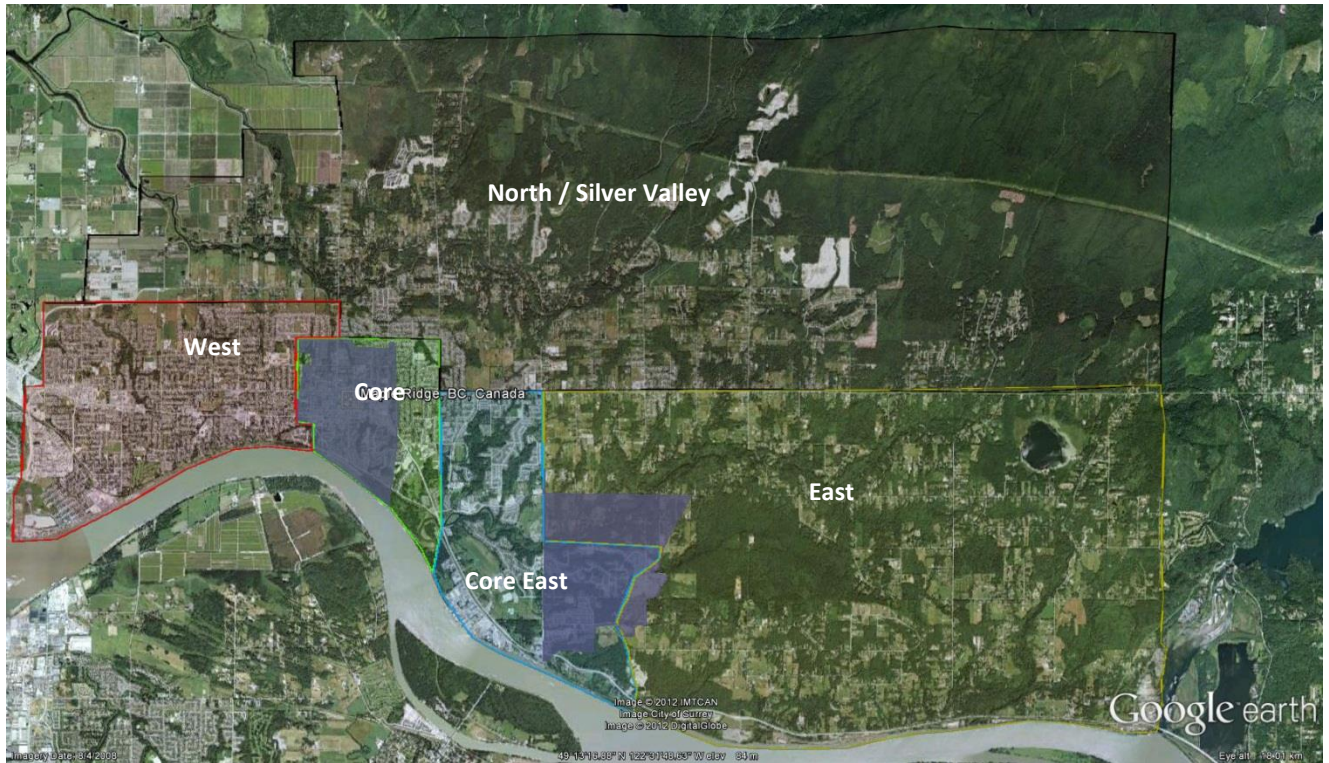
Approximately 13.1% or 45.5 acres of the District’s zoned commercial lands are currently vacant, while 11.3% or 39.3 acres are underutilized.<sup>13</sup> The largest amounts of both vacant and underutilized zoned land are in the Town Centre.

GPRA has subdivided Maple Ridge into five geographic areas for the purpose of commercial space demand forecasting. These areas are outlined in the map below, with grey filled areas denoting the Town Centre and Albion Area Plan areas.<sup>14</sup>

**Table 12: Zoned Commercial Lands**

| Zoned Commercial Lands            |       |            |
|-----------------------------------|-------|------------|
| Zone                              | Acres | % of Total |
| Community Commercial (C-2)        | 35.4  | 10.2%      |
| Heritage Commercial (H-1)         | 0.9   | 0.3%       |
| Neighbourhood Commercial (C-1)    | 7.6   | 2.2%       |
| Neighbourhood Pub Zone (C-4)      | 2.8   | 0.8%       |
| Recreation Commercial (CS-3)      | 40.4  | 11.7%      |
| Service Commercial (CS-1)         | 134.2 | 38.7%      |
| Service Station Commercial (CS-2) | 5.8   | 1.7%       |
| Town Centre Commercial (C-3)      | 117.1 | 33.8%      |
| Village Centre Commercial (C-5)   | 0.7   | 0.2%       |

**Figure 3: Maple Ridge Geographic Sub-Areas, and Boundaries of Town Centre and Albion Area Plans (in grey)\***



\*Note: Identified areas do not reflect planning area boundaries indicated in the Maple Ridge Official Community Plan

<sup>13</sup> Underutilized lands are lands with a low value of improvements to property value (less than 10%).

<sup>14</sup> See Appendix A for a description of each sub-area’s corresponding Traffic Zones, descriptions of area boundaries, and a Traffic Zone map.

The 'Core' (outlined in green) encompasses the Town Centre plus a 'fringe' area to the east to 232<sup>nd</sup> street. The 'Core East' encompasses Cottonwood and East Haney, as well as a portion of the Albion Area Plan.

Following is an overview of current commercial floor area and land inventory by the 5 geographic areas.

#### 4.5.2 West Maple Ridge Commercial Inventory

West Maple Ridge is home to 807,000 square feet of commercial space, representing 32% of total District inventory. An estimated \$214 million of retail expenditures were captured in the West over the past year, representing 33% of all retail spending within the District.

**Table 13: West Maple Ridge Commercial Inventory**

| <b>West Maple Ridge Commercial Inventory</b> |                |                     |
|--|----------------|---------------------|
| Categories                                   | Square Feet    | % of District Total |
| Convenience Goods & Services                 | 259,300        | 27%                 |
| Comparison Goods                             | 300,100        | 37%                 |
| Food & Beverage                              | 113,200        | 34%                 |
| Entertainment & Leisure                      | 50,300         | 35%                 |
| Auto Goods & Services                        | 84,300         | 45%                 |
| <b>Total</b>                                 | <b>807,200</b> | <b>34%</b>          |

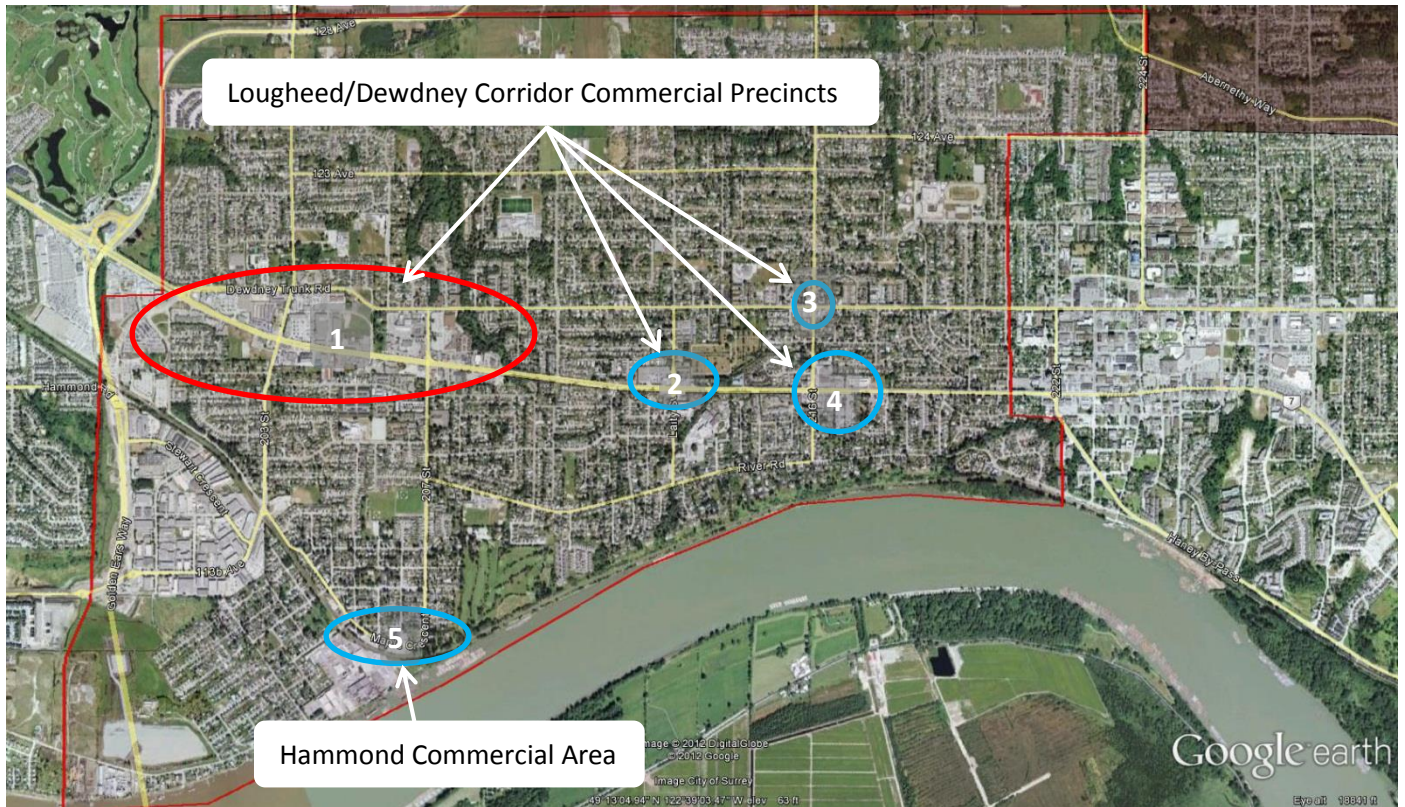
In the West, the majority of commercial floor area is contained within small and large auto-oriented strip plazas and centres along the Lougheed Highway and Dewdney Trunk Road corridors. Most of the larger retail plazas appear to be relatively healthy, with low vacancy and strong anchor tenants (e.g. Safeway, Save-On Foods). There are some areas with relatively marginal businesses and poor upkeep along the corridor; these underutilized commercial sites will likely be redeveloped slowly over the next 10-20 years.

The West contains 125 acres of zoned commercial lands (36% of total) and 180 acres of OCP designated commercial land. Of the zoned space, 12 acres are considered 'underutilized' while nearly 11 acres are classified as vacant.

The entirety of the Dewdney/Lougheed corridor (Areas 1, 2, 3 and 4 on the map below) contains approximately 170 acres of OCP-designated commercial lands, 120 acres of which is currently zoned for some form of commercial use. Of the zoned commercial space in the corridor, 7.6% (9.1 acres) of the lands are classified as 'vacant' while 9.6% (11.5 acres) are classified as 'underutilized.'

In the southern cluster of Hammond (Area 5 on the map below), located southwest of Maple Meadows Business Park, there are 6.2 acres of zoned commercial. 0.8 acres are considered underutilized while 1.7 acres are vacant.

Figure 4: West Maple Ridge Commercial Precincts



Note: Identified area does not reflect planning area boundaries indicated in the Maple Ridge Official Community Plan

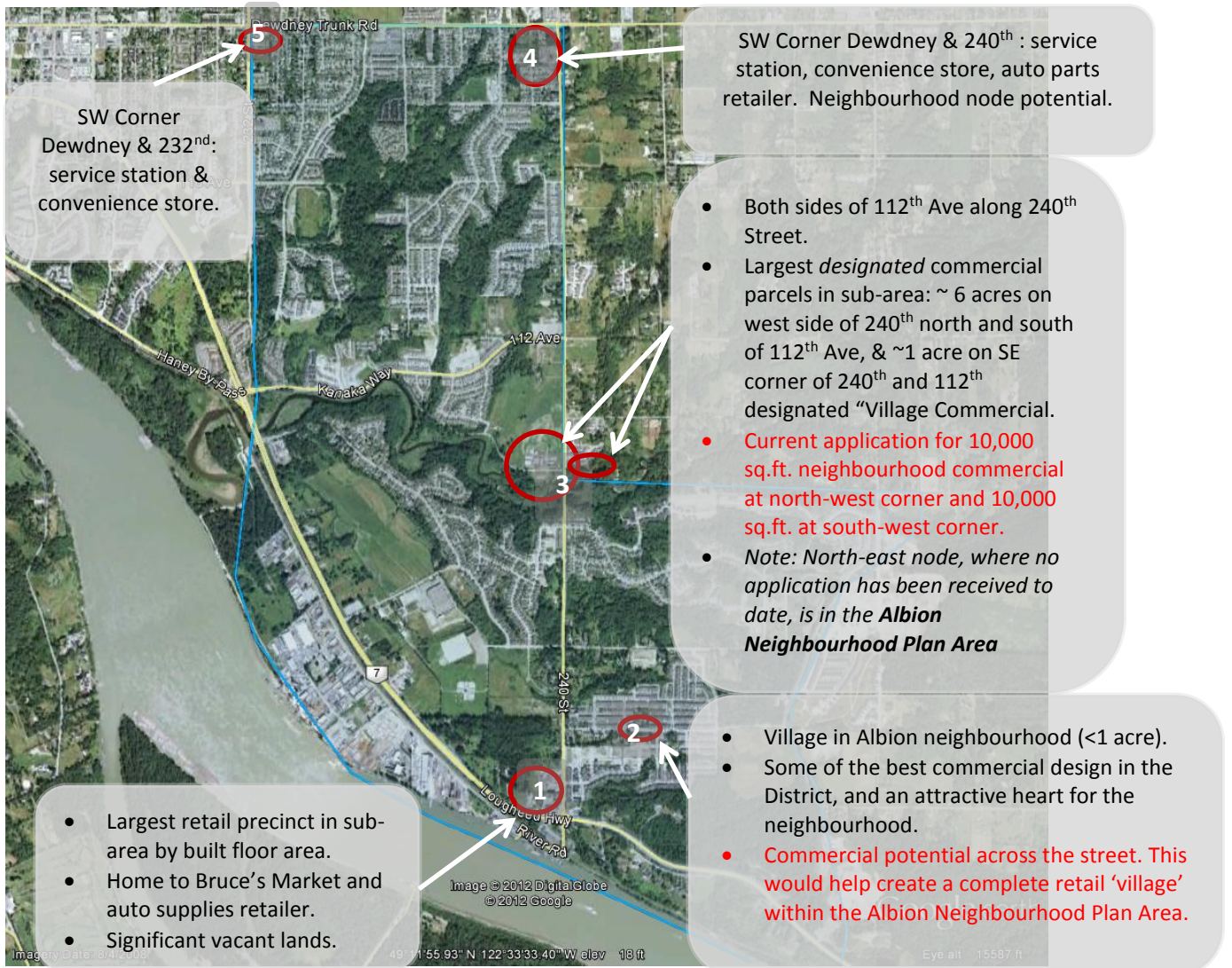
### 4.3.2 Core East

The commercial precincts within the Core East area are home to nearly 19,000 square feet of commercial space, representing 0.7% of total District inventory. An estimated \$6.5 million of retail expenditures were captured in this area over the last year, representing 1% of District spending.

There are 5 areas within this sub-region that are designated for commercial in the OCP, as depicted in the map below. In all, this sub-region contains an estimated 21 acres of OCP-designated commercial lands with nearly 16 acres currently commercially zoned. There are nearly 5 acres of either vacant or underutilized zoned commercial land.

**Table 14: Core East Commercial Inventory**

| Core East Commercial Inventory |               |                     |
|--------------------------------|---------------|---------------------|
| Categories                     | Square Feet   | % of District Total |
| Convenience Goods & Services   | 8,800         | 0.9%                |
| Comparison Goods               | 4,300         | 0.5%                |
| Food & Beverage                | 2,000         | 0.6%                |
| Entertainment & Leisure        | 1,000         | 70.0%               |
| Auto Goods & Services          | 2,600         | 1.4%                |
| <b>Total</b>                   | <b>18,700</b> | <b>0.8%</b>         |



Note: Identified area does not reflect planning area boundaries indicated in the Maple Ridge Official Community Plan

### 4.3.3 East Maple Ridge Commercial Supply

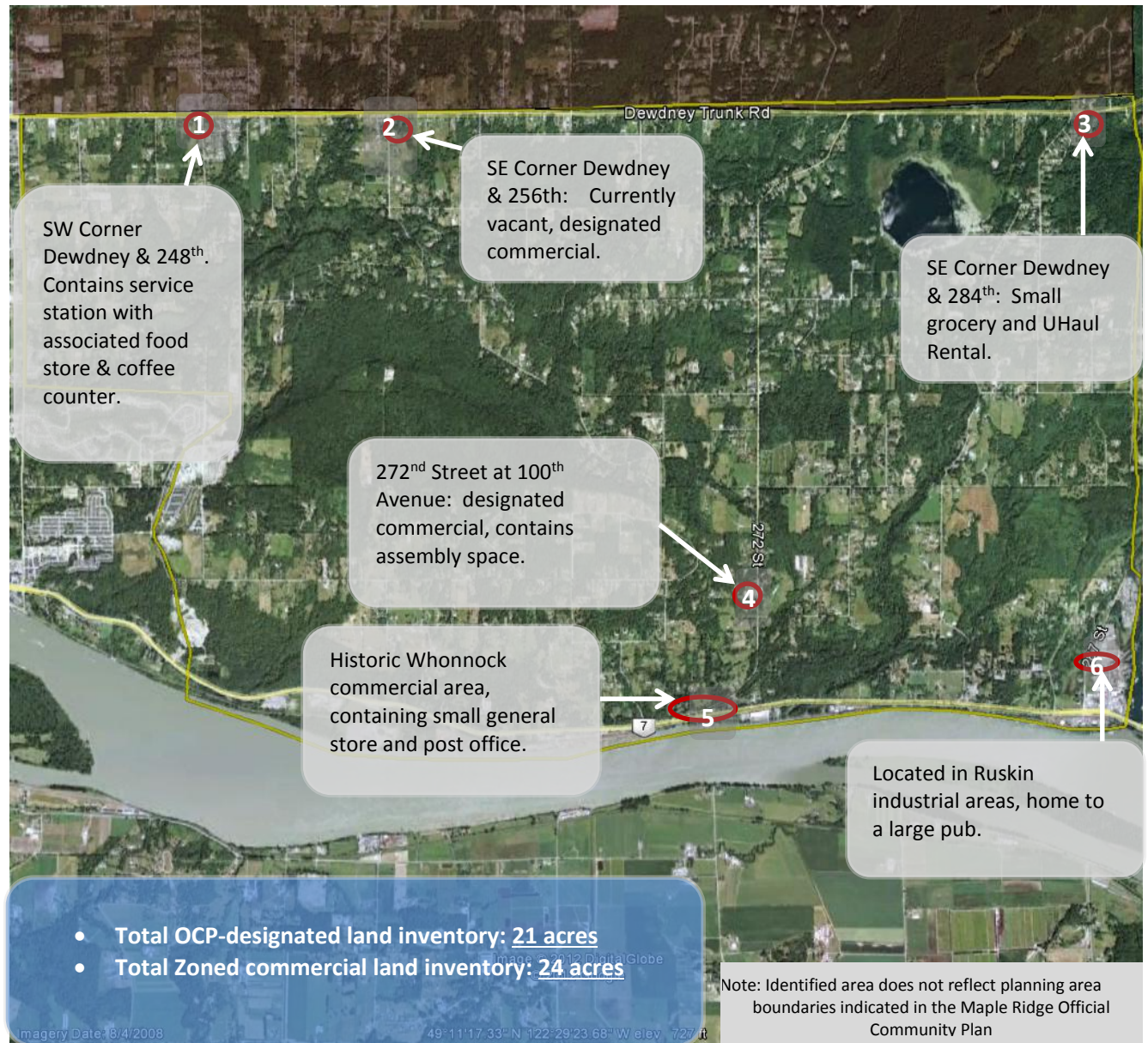
East Maple Ridge contains six nodes designated for commercial space totaling 21 acres. Not all nodes currently contain retail floor area, and not all are zoned. The total built space in the East is an estimated 6,600 square feet, representing 0.3% of District commercial inventory.

All 6 designated commercial nodes are depicted on the map below.

Figure 5: East Maple Ridge Commercial Areas

Table 15: East Maple Ridge Commercial Inventory

| East Commercial Inventory    |              |                     |
|------------------------------|--------------|---------------------|
| Categories                   | Square Feet  | % of District Total |
| Convenience Goods & Services | 2,700        | 0.3%                |
| Comparison Goods             | 0            | 0.0%                |
| Food & Beverage              | 3,900        | 1.2%                |
| Entertainment & Leisure      | 0            | 0.0%                |
| Auto Goods & Services        | 0            | 0.0%                |
| <b>Total</b>                 | <b>6,600</b> | <b>0.3%</b>         |



#### 4.3.4 Silver Valley/North Commercial Supply

The Silver Valley/North contains the nodal commercial areas along the north side of Dewdney Trunk Road from 232<sup>nd</sup> Street to 256<sup>th</sup> Street, as well as designated commercial precincts within the Silver Valley Neighbourhood Plan area.

The North today contains an estimated 56,000 square feet of built commercial floor area, representing 3% of District inventory.

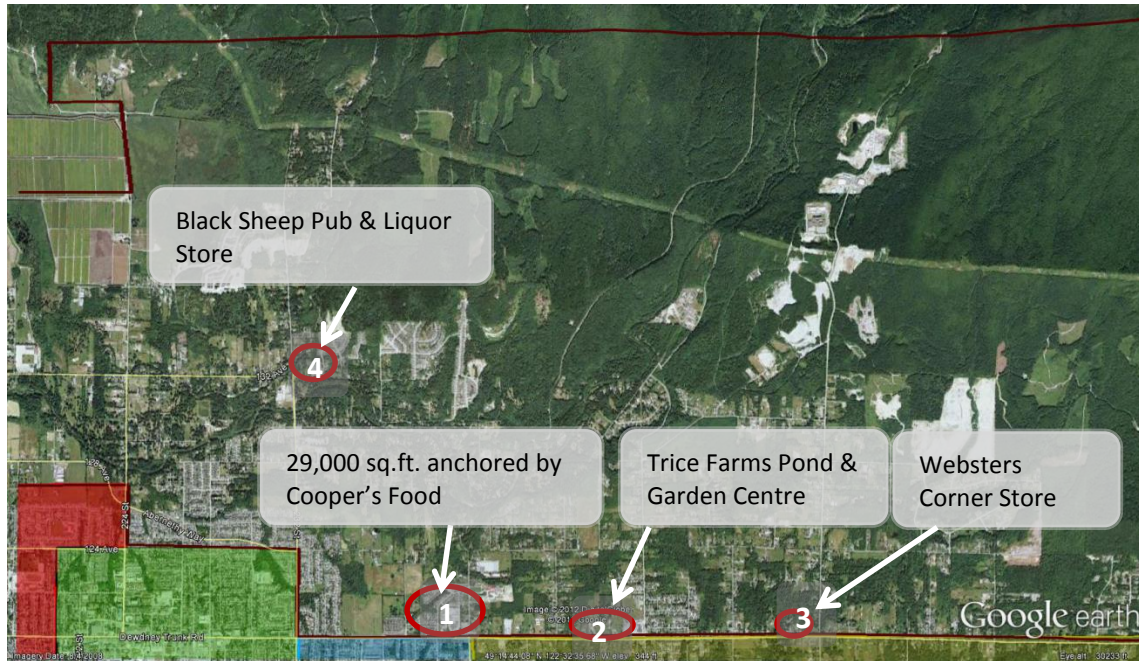
**Table 16: North/Silver Valley Commercial Inventory**

| North / Silver Valley Commercial Inventory |               |                     |
|--|---------------|---------------------|
| Categories                                 | Square Feet   | % of District Total |
| Convenience Goods & Services               | 36,600        | 3.9%                |
| Comparison Goods                           | 2,000         | 0.2%                |
| Food & Beverage                            | 14,400        | 4.4%                |
| Entertainment & Leisure                    | 3,000         | 2.1%                |
| Auto Goods & Services                      | 0             | 0.0%                |
| <b>Total</b>                               | <b>56,000</b> | <b>2.3%</b>         |

The majority of this space is located in **Area 1**, at the Cooper’s Food-anchored community shopping centre on the north-west corner of Dewdney Trunk Road and 240<sup>th</sup> Street. This node contains 29,000 square feet of retail grocery space, 5,000 square feet of restaurant space, and 2,000 square feet of personal services.

**Area 2**, at Dewdney and 246<sup>th</sup>, contains Trice Farms Pond and Garden. **Area 3**, at Dewdney and 256<sup>th</sup>, contains a small food store. **Area 4**, at 232<sup>nd</sup> Street and Dogwood Avenue, is home to the Black Sheep pub and a liquor store.

**Figure 6: North Maple Ridge Commercial Nodes**



Note: Identified area does not reflect planning area boundaries indicated in the Maple Ridge Official Community Plan

The North contains 36 acres of designated commercial lands and 30 acres of zoned commercial land. Of the zoned area, 6.3 acres are 'underutilized' and 0.5 acres are vacant.

#### 4.3.5 Core Area Commercial Supply

The Core Area (Town Centre + Fringe) is the primary area of commercial activity in the District, home to over 1.5 million square feet of commercial space representing 63% of the District's inventory. An estimated \$392 million in retail expenditures were captured in the Town Centre in the past year, accounting for 61% of spending within the District. 71% of all floor area in the Town Centre is located between Lougheed Highway in the South, Dewdney Trunk Road in the North, 221<sup>st</sup> Street west and 228<sup>th</sup> Street in the east.

**Table 17: Town Centre Commercial Inventory**

| Town Centre Commercial Inventory |                  |                     |
|----------------------------------|------------------|---------------------|
| Categories                       | Square Feet      | % of District Total |
| Convenience Goods & Services     | 636,600          | 67%                 |
| Comparison Goods                 | 498,300          | 62%                 |
| Food & Beverage                  | 195,700          | 59%                 |
| Entertainment & Leisure          | 87,400           | 62%                 |
| Auto Goods & Services            | 102,000          | 54%                 |
| <b>Total</b>                     | <b>1,520,000</b> | <b>63%</b>          |

We have subdivided the Town Centre into the following five inventory sub-areas:

- *Area 1: Dewdney to Lougheed, 224<sup>th</sup> to Burnett Street*
- *Area 2: Dewdney to Lougheed, 221<sup>st</sup> to 224<sup>th</sup> Street*
- *Area 3: Dewdney to 124<sup>th</sup>, 221<sup>st</sup> to Greenwell Street*
- *Area 4: Lougheed to Haney Bypass, 222<sup>nd</sup> to Burnett Street*
- *Area 5: Burnett Street to 232<sup>nd</sup>, Lee Avenue to Haney Bypass<sup>15</sup>*

The Town Centre contains 186 acres of designated commercial land area and 152 acres of zoned commercial lands. Of the zoned areas, 20.5 acres are classified as 'vacant' with an additional 12 acres classified as 'underutilized.'

*See map on following page.*

<sup>15</sup> While this area falls outside the boundaries of the Town Centre Area Plan, for the purposes of this analysis it has been considered as part of the downtown.

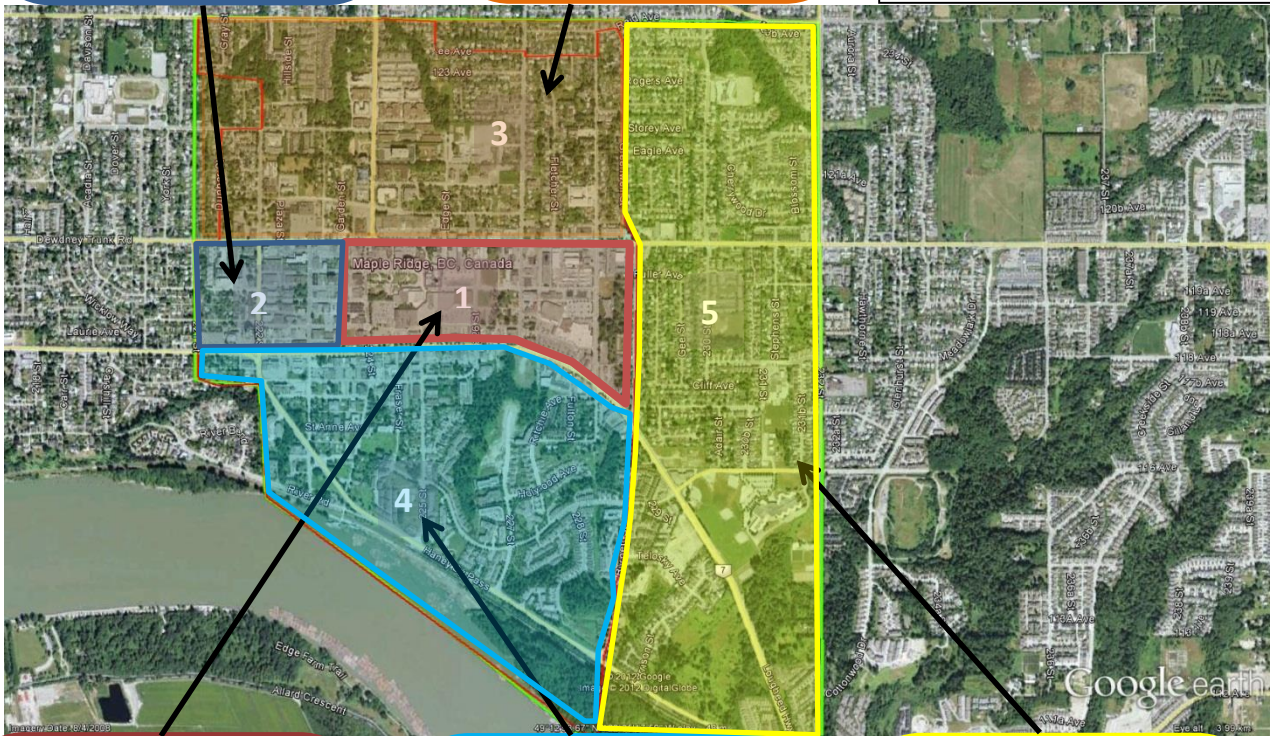
**Area 2: Town Centre West**

- **372,000 sq.ft.**
- 24% of inventory
- Major categories: financial and legal services (71,000 sf), health services (60,000 sf), home furnishings/accessories (44,000 sf.)

**Area 3: Town Centre North**

- **275,000 sq.ft.**
- 18% of inventory
- Major categories: retail grocery (46,000 sf), health services (55,000 sf), home furnishings (28,000 sf), restaurant (21,000 sf.)

**Figure 8: Core Area Commercial Space**



**Area 1: Town Centre Heart**

- **713,000 sq.ft.**
- 47% of inventory
- Major categories: retail grocery (95,000 sf), home improvement (60,000 sf), restaurant (78,000 sf)

**Area 4: Town Centre South**

- **132,000 sq.ft.**
- 9% of inventory
- Major categories: restaurants (37,000 sf), financial and legal services (15,000 sf), apparel (12,000 sf).

**Area 5 (Core Fringe):**

- **39,000 sq.ft.**
- <3% of inventory
- Major categories: personal service, auto goods & services.

Note: Identified area does not reflect planning area boundaries indicated in the Maple Ridge Official Community Plan



## 5.0 DISTRICT-WIDE COMMERCIAL DEMAND

### Highlights:

- Anticipated demand for 1.3 million net additional square feet of retail and service commercial space by 2042;
- 50% of demand to Town Centre area, 36% to West;
- Between 73 and 114 acres of land required;
- Sufficient OCP-designated commercial land capacity.

### 5.1 DEMAND FACTORS

Demand for new retail space across the District will be driven by factors of population growth (and its geographic distribution), inflow/through-flow spending capture (tourists, business, destination shopping etc.), and the stemming of outflow spending.

#### 5.1.1 Population

The District's population projections in the Official Community Plan and Regional Context Statement are estimated at 118,000 by 2041. For analytical purposes, however, the population projections of Metro Vancouver's Regional Growth Strategy will be used, as noted in Table 18 below. The projections from the Regional Growth Strategy combine estimates from all of Metro Vancouver's member municipalities. These projections are considered the most comprehensive available and have been used to assess demand for the District's commercial and industrial land supply.

**Table 18: Population Growth Projections by Sub-Region, 2012 to 2042**

| Population Growth by Sub-Region, Maple Ridge, 2012-2042* |        |        |           |        |          |                |
|--|--------|--------|-----------|--------|----------|----------------|
| Year   | West   | Core   | Core East | East   | North/SV | Total          |
| 2012   | 26,946 | 15,785 | 15,153    | 6,352  | 15,695   | <b>79,931</b>  |
| 2022   | 30,228 | 22,343 | 17,568    | 7,842  | 17,577   | <b>95,558</b>  |
| 2032   | 33,842 | 30,962 | 20,287    | 9,500  | 19,755   | <b>114,346</b> |
| 2042   | 37,453 | 39,253 | 22,676    | 10,650 | 22,227   | <b>132,259</b> |
| 30 Year Growth 2012-2042                                 | 10,507 | 23,468 | 7,523     | 4,298  | 6,532    | 52,328         |
| % of Total Growth by Region, 2012-2042                   | 20.1%  | 44.8%  | 14.4%     | 8.2%   | 12.5%    |                |
| Rate of Growth within each region, 2012-2042             | 39.0%  | 148.7% | 49.6%     | 67.7%  | 41.6%    |                |

\*Metro Vancouver Growth Forecasts by Traffic Zone, with linear extrapolation between target years.

As shown in the table above, the Core is expected to be the primary growth area for Maple Ridge in the next 30 years, attracting 45% of total District Growth. By 2042 it is expected to contain 30% of the District's population, surpassing the West which will drop from 34% today to 28% by 2042. The Core East's share of District population will drop from 19% today to 17% by 2042, while the East and North/Silver Valley will remain at 8% and drop from 20% to 17% respectively.

### *5.1.2 Inflow and Flow-Through Spending*

Maple Ridge benefits from capture of flow-through and inflow retail spending, particularly during the peak summer tourist season as people drive through the community to access Golden Ears Park and other outdoor recreational opportunities. Maple Ridge also attracts people from across the region for youth sporting events/tournaments, equestrian recreation, fishing, hiking, cycling and golf. In addition, there are those who commute into Maple Ridge each day for work and make lunch-hour and after work retail expenditures in the community. As the Metro Region grows, flow-through traffic and spending will likely also grow. Additionally, as the community grows and offers more destination recreational and business opportunities (e.g hotel/conference space, gaming centre), more retail spending in the community will be a knock-on benefit.

### *5.1.3 Stemming of Outflow Spending*

Currently Maple Ridge has significant net retail spending leakage, estimated at over 17% of total District spending potential in 2012.<sup>16</sup> Of an estimated \$767 million in retail expenditures in 2012, outflow is calculated at \$128 million. Put another way, the amount of money leaving Maple Ridge could support approximately 650,000 square feet of combined retail space across all merchandise categories. As Maple Ridge grows and its retail offerings strengthen, a greater percentage of spending outflow is likely to be recaptured. This process of retail strengthening is already starting to occur, as discussed in Section 5.2.

## 5.2 CURRENT AND ANTICIPATED COMMERCIAL DEVELOPMENT

The commercial landscape in Maple Ridge is evolving, with some significant new projects either already underway or coming soon which will bring many new shopping opportunities to the community. While additional retail development in the community may have minor sales cannibalization effects on existing retailers, more than anything else the addition of significant new retail space will lead to the recapture of some of the District's considerable outflow spending.

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<sup>16</sup> Within Convenience retail and service categories, outflow is estimated at 11%. Within Comparison Goods categories, outflow is a more substantial 30-35%.

The following table outlines some of the more significant ongoing and near-term commercial development/redevelopment activities occurring in the District. The absorptive effects of new retail space are taken into account when projecting future 'net new' demand.

**Table 19: Current and Near-Term Commercial Projects**

| <b>Current/Near Term Commercial Projects</b>                     |   |  |
|--|---|--|
| <b>Project</b>   | <b>Location</b>                             | <b>Comments</b>  |
| Haney Place Mall Upgrades (facades, parking, plaza, landscaping) | Core  | The upgrades will be a positive step in better integrating the mall into the Town Centre's pedestrian circulation system and presenting a more urban face to both 224th and 226th streets.   |
| Thrifty Foods  | Core  | The recent opening of Thrifty Foods at Haney Place Mall brings a first class retail grocery anchor to the Town Centre. The presence of this anchor will help draw ancillary retail spending to other town centre retailers.  |
| Target (coming soon)   | Core  | The replacement of Zellers with Target at Haney Place Mall is one of the most anticipated and exciting additions to the Maple Ridge retail landscape in a decade. Target will attract significantly more spending across all comparison goods categories than Zellers, especially in the categories of apparel, Footwear/fashion, and home furnishings and accessories. This anchor will also bring significant benefit to ancillary retail tenants both in the mall and on the street in the Town Centre. |
| Kwantlen First Nation Retail Project (underway)                  | Lougheed Highway, 4 km east of Albion Flats | Anticipated 300,000 square feet of highway-oriented retail with 1 or 2 large format anchors (100,000 square feet each) and 9-12 medium and smaller format retail units. In addition, 50,000 square feet of convenience commercial, service station and neighbourhood business services. Anticipated completion in 2013-2014.   |
| SmartCentres, Albion Flats (unknown timeline)                    | Albion Flats                                | Despite recent ALC ruling, SmartCentres is likely to continue its pursuit of a destination shopping centre at Albion Flats. However, this development does not factor into the residual demand analysis of this report.  |
| Rezoning at 112th and 240th                                      | Core East                                   | Rezoning application for 10,300 square feet and 3,300 square feet of neighbourhood commercial. Unknown tenant mix and build-out schedule, but assumed completion by 2015.  |

### 5.3 DISTRICT-WIDE COMMERCIAL DEMAND PROJECTIONS

With the above context in mind, we explore how much additional commercial floor area Maple Ridge can likely support in the next 30 years, the likely geographic distribution of demand, and the associated land use implications. This leads to a discussion of commercial strategies by sub-region.

### 5.3.1 Current and Future Outflow under 'status quo'

GPRC calculates that retail expenditure potential in Maple Ridge will grow from \$767 million in 2012 to \$1.02 billion by 2022 and \$1.71 billion by 2042. If outflow were to remain at its current levels, by 2042 Maple Ridge would be losing nearly \$300 million in expenditures; this could support over 1.7 million square feet of combined retail floor area.

**Table 20: Commercial Expenditure and Outflow Projections**

| <b>Maple Ridge Commercial Expenditure Projections</b> |                      |                        |                        |                        |
|---|----------------------|------------------------|------------------------|------------------------|
|   | 2012                 | 2022                   | 2032                   | 2042                   |
| Convenience Goods & Services                          | \$355,988,000        | \$474,706,000          | \$620,546,000          | \$792,721,000          |
| Comparison Goods                                      | \$313,406,000        | \$417,923,000          | \$546,319,000          | \$697,899,000          |
| Food & Beverage                                       | \$57,850,000         | \$77,143,000           | \$100,843,000          | \$128,822,000          |
| Entertainment & Leisure                               | \$15,147,000         | \$20,198,000           | \$26,403,000           | \$33,729,000           |
| Auto Goods & Services                                 | \$24,586,000         | \$36,064,000           | \$47,143,000           | \$60,224,000           |
| <b>Total</b>  | <b>\$766,977,000</b> | <b>\$1,026,034,000</b> | <b>\$1,341,254,000</b> | <b>\$1,713,395,000</b> |
| Est.Outflow (projected at 2012 levels)                | -\$128,662,000       | -\$172,119,355         | -\$224,998,171         | -\$287,425,604         |

### 5.3.2 Demand Projection Factors

In addition to the retail projects discussed in Table 20 above, which themselves will help capture more spending in the District, there are other positive actions and trends underway:

- Significant commercial business interest and activity in the Town Centre today;
- Proactive, multi-pronged Town Centre incentives in place;
- A strong policy direction for compact, pedestrian-oriented town centre development;
- Growth in retail trends favouring Town Centre development (discussed below).

***Given emerging trends, development interest and activity, and proactive civic policy, GPRC is confident that Maple Ridge will see long-term spending outflow recapture of at least 20%. This has been taken into account in demand modeling.***

### 5.3.3 Net New Commercial Demand

GPRA projects net new demand for retail and service commercial floor area in the District to be approximately **1.3 million square feet by 2042**. Demand would be split up as follows:

**Table 21: Net New Commercial Floor Area Demand: 2022, 2032, 2042**

| <b>Demand for New Retail &amp; Service Commercial Space, Maple Ridge</b>                                    |                          |                               |                |                  |
|---|--------------------------|-------------------------------|----------------|------------------|
| <b>Categories</b>   | <b>Current Inventory</b> | <b>Net Additional Demand*</b> |                |                  |
|   |                          | <b>2022</b>                   | <b>2032</b>    | <b>2042</b>      |
| Convenience Goods & Services  | 943,950                  | 118,300                       | 314,800        | 513,200          |
| Comparison Goods  | 804,700                  | 69,000                        | 245,100        | 422,800          |
| Food & Beverage   | 329,200                  | 20,900                        | 86,500         | 152,700          |
| Entertainment/Leisure   | 141,700                  | 18,600                        | 48,700         | 79,100           |
| Auto Goods & Services   | 188,905                  | 55,800                        | 97,200         | 139,000          |
| <b>Total</b>  | <b>2,408,455</b>         | <b>282,600</b>                | <b>792,300</b> | <b>1,306,800</b> |
| *Assumes 300,000 sq.ft. absorbed into market at Kwantlen in 2014, & additional 50,000 sq.ft. added by 2022. |                          |                               |                |                  |

We assume that, on average, new commercial space will be built at between 0.3 and 0.4 FSR. At these densities, 1.3 million square feet would require **between 73 and 114 acres of land**.

Section 6 provides detailed discussion of commercial demand, land use implications and associated opportunities and strategies for each of the 5 geographic sub-areas. By way of introduction and summary, we believe that the 1.3 million square feet of projected commercial floor area demand will be distributed by area as follows:

- *Core* 49% (sections 6.1 and 6.2)
- *West:* 36% (section 6.3)
- *Core East:* 7% (section 6.4)
- *North/Silver Valley:* 6% (section 6.5)
- *East:* 2% (section 6.6)

## 6.0 SUB-REGION RETAIL AND SERVICE COMMERCIAL DEMAND, STRATEGIES, OPPORTUNITIES

### Highlights:

- Core Area will need 33 to 55 acres to meet demand;
  - Challenges: small lots, fractured and speculative ownership.
- West will need 23 to 38 acres to meet demand;
  - Challenges: encouraging more urban form of development;
  - Zoning bylaw consolidation;
  - Maintaining industrial/business park land for non-retail use.
- Other areas will need between 13 and 20 acres to accommodate demand. There is sufficient designated commercial land supply in the East, the North and in Cottonwood to meet demand.

### 6.1 TOWN CENTRE COMMERCIAL DEMAND<sup>17</sup>

The Town Centre is home to approximately 64% of Maple Ridge’s commercial floor area today and captures about 60% of commercial spending within the District.

#### 6.1.1 Commercial Demand and Opportunity

**GPRA projects that nearly 50% of District-wide commercial demand over the next 30 years will be directed to the Town Centre. This represents over 635,000 square feet of additional commercial floor area. This demand is allocated by merchandise category as follows:**

**Table 22: Town Centre Commercial Demand Projections**

| <b>Town Centre Commercial Demand: 2022, 2032, 2042</b> |                |                |                |
|--|----------------|----------------|----------------|
| <b>Categories</b>                                      | <b>2022</b>    | <b>2032</b>    | <b>2042</b>    |
| Convenience Goods & Services                           | 62,682         | 166,840        | 271,971        |
| Comparison Goods                                       | 30,710         | 109,024        | 188,085        |
| Food & Beverage  | 11,999         | 49,688         | 87,737         |
| Entertainment & Leisure                                | 1,680          | 20,601         | 33,460         |
| Auto Goods & Services                                  | 14,259         | 38,864         | 55,585         |
| <b>Total</b>   | <b>121,330</b> | <b>385,017</b> | <b>636,838</b> |

<sup>17</sup> While the data presented here takes into account both the Town Centre and “Town Centre Fringe” as depicted in Figure 8, the latter has a negligible portion of current inventory and all demand projections assume that future space will be allocated within the bounds of the Town Centre Area Plan.

### 6.1.2 Factors of Floor Area Demand in Town Centre

In determining how much District-wide floor area demand is likely to 'land' in the Town Centre versus other existing or future retail developments on the Lougheed/Dewdney corridor or future shopping centres at Kwantlen and elsewhere, GPRA took into account the following:

1. Population growth projections for the Town Centre and across the District, examining how growth in each area would likely translate to demand for retail downtown;
2. The evolution of retail development trends and fundamentals, and their implications for Town Centre retail attraction and retention.

#### 1. Population Growth and Distribution

The Core area is expected to be the most populated of District sub-regions by 2042. This population will rely on local retail/service commercial for much of their day-to-day convenience needs, as well as a sizeable portion of their destination/comparison shopping, food and beverage spending, and leisure spending. These population projections are therefore a primary determinant of future commercial demand.

But Town Centre commercial serves much more than the local residential market. For instance, in 2012, the Core area residential population has an estimated retail expenditure potential of about \$124 million (after accounting for outflow). By itself, this population could support about 470,000 square feet of commercial floor area in Maple Ridge, with about 180,000 in the Convenience Goods & Services category. Yet in 2012, the Town Centre has over 1.5 million square feet of commercial inventory and captures an estimated \$390 million in annual sales revenue. Clearly, the Town Centre acts as most downtowns do (or hope to do): as a primary destination for commercial spending.

GPRA also believes that the 'magnetism' of the Town Centre is increasing, due to the following factors:

- New high-quality retail anchors (Target and Thrifty Foods). These are the basic building blocks of downtown revitalization;
- Presence of three retail grocery anchors (Save-On, Extra, Thrifty);
- Cluster of non-retail anchors in an attractive civic precinct (city hall, library, performing arts centre, and recreation centre).
- Significant streetscape and façade improvements making the public realm more attractive. This will be aided by the \$2 million in upgrades at Haney Place Mall.

- Town Centre investment incentives encouraging business and housing growth.

As we anticipate the Town Centre will strengthen its role as the primary destination for spending on retail, service and leisure in the years to come, we examined how spending generated in other areas of Maple Ridge are likely to 'flow' (or not flow) to the Town Centre in the years to come.

#### *Spending inflow from other parts of Maple Ridge*

**West:** The likelihood of Western Maple Ridge residents traveling to the Town Centre will be both of function of their proximity to the Town Centre relative to other destination shopping options (e.g. Meadowtown Shopping Centre, new Fremont Village power centre, expanding Coquitlam Town Centre etc.), and the relative attractiveness of major anchors in the Town Centre. We expect an increasing share of flow from the West to the Town Centre.

**North:** Many people from the North's growing Silver Valley neighbourhoods will make destination shopping trips to the Town Centre. Much of the future retail development slated for this community will be in the convenience categories (including grocery); for destination shopping, the nearest precinct is the Town Centre.

#### **Core East & East:**

In the Core East and East areas, destination spending that remains in Maple Ridge is likely to be split between trips to the Town Centre and trips to the new destination shopping centre soon to be opened at the Kwantlen Lands.

In addition, and as mentioned previously, we anticipate an increase in spending inflow from elsewhere in the region, as well as more daytime retail/food & beverage spending associated with a growing workforce.

The Town Centre can, over the short, medium and long term, successfully differentiate itself from other parts of the District and make itself the primary destination for leisure, culture and entertainment, and possibly destination wants-based retail spending.

## **2. Evolution of Retail Development Trends**

Retail development trends are moving in favour of Town Centre commercial growth and vitality.

- As the trend moves more toward urban multi-family living, many leading retailers are designing new, more flexible store



formats that can be adapted to smaller blocks/retail spaces in town centres;

- Large format stores are increasingly experimenting with smaller floor plates (sometimes as small as 10-20,000 square feet)<sup>18</sup>, multi-level concepts, wrapped structured parking, and are integrating into urban streetscapes through the use of liner shops and layering of uses;
- There is a growing trend in the retail development world toward emphasis on locating in areas (or creating areas) with grid street networks and flexible spaces that can allow for evolution based on market trends, rather than emphasizing inflexible, single-use auto-oriented developments. Town Centres with decaying enclosed or externally-oriented shopping centres can be prime candidates for such new urban-style retail development;
- While mixed-use developments have had higher economic risk profiles, making some retailers wary of participating, new trends indicate that mixed use developments are becoming easier to obtain financing for. The trend is toward partnerships and mergers that allow for shared expertise and more integrated developments. This bodes well for town centres;
- Downtowns across Canada are revitalizing and differentiating themselves from other retail centres by emphasizing experience and entertainment. Cultural uses in downtowns can act as anchors, supporting other businesses such as restaurants and specialty retail;
- Movie theatres are making a comeback to Main Street. Theatres that show movies in the evening can help increase the number of customers and energy in the downtown;
- Town Centres can distinguish themselves from 'cookie-cutter' retail plazas by promoting their history and special memories of downtown. Branding is a key component of downtown success.

These are some of the key emerging trends that bode well for Town Centre commercial in Maple Ridge.

### *6.1.3 Challenges and Opportunities for Town Centre Commercial*

The challenge facing many town centres today, including Maple Ridge, is neither lack of demand for new commercial space, nor necessarily a lack of demand from prime retailers (as in the past), of whom many are showing increased flexibility and desire to come downtown. Rather, the central

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<sup>18</sup> The recently opened London Drugs at Vancouver's Village at False Creek (former Olympic Village) is 17,000 square feet, less than half the size of their typical stores. It has underground parking, multi-family dwellings above, and fronts onto a community square.

stumbling block is the provision of a sufficient and timely supply of suitable land.

To accommodate 637,000 square feet of new commercial floor area, Maple Ridge Town Centre would require anywhere from 33 to 55 acres of commercial land.<sup>19</sup>

Of the Town Centre's zoned commercial land base, there are 20.5 acres vacant and 12 acres underutilized. More importantly perhaps, there are 164 acres of OCP designated "Town Centre Commercial," which, if developed at appropriate densities, will be more than enough to accommodate anticipated development and redevelopment over the next 30 years. Near-term development pressure will be mostly directed at vacant and underutilized zoned lands (e.g. Haney Plaza) while over time existing commercial buildings will depreciate to become underutilized and thus become prime candidates for redevelopment. While the absolute amount of zoned town centre commercial may decrease (e.g. as areas along 224<sup>th</sup> south of North Avenue currently zoned commercial get rezoned for multi-family residential development in line with OCP designation), there will not be a shortage of space to accommodate future demand within the downtown core.

The key challenges that the Town Centre faces are:

- Many small lots and fractured lot ownership, requiring assembly;
- Speculators driving up land costs, sometimes by pursuing comprehensive rezonings with an intention only to flip the property rather than develop;
- Land owners who have sufficient cash flow from their properties without making significant reinvestments.

The following section discusses initiatives and strategies that the District can pursue to continue strengthening the Town Centre.

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<sup>19</sup> Depending on setbacks, single vs. multi-storey, and parking (surface vs. structured vs. underground). Assumptions are FSR Range of 0.3 to 0.5 and average building efficiency of 90%.

## 6.2 TOWN CENTRE COMMERCIAL STRATEGIES & RECOMMENDATIONS

### 6.2.1 General Strategies

| Regulatory             | Strategies   | Timing <sup>20</sup>        |
|------------------------|--|-----------------------------|
| Town Centre Area Plan  | Maple Ridge has already taken a strong direction with its Town Centre Area Plan, putting in place many of the preconditions necessary to create certainty of direction that will attract investors, businesses and residents.  |                             |
| Designation            | At the macro level, analysis indicates that there is no need to designate additional commercial lands in the Town Centre to accommodate projected growth, even at relatively conservative (0.3) FSRs. We do however recommend that the District consider applications for ground floor commercial in areas currently not designated for such use on a case-by-case basis. Each case should be examined for its contribution toward enhancing the quality of the Town Centre or its immediate Town Centre sub-area. | Ongoing                     |
| Zoning                 | Consider reducing the number of commercial zones, or better differentiating between some commercial zones.   | Short-Term                  |
| Incentives & Promotion | Strategies   | Timing                      |
|                        | Promote dialogue and partnership between investors, developers, land owners and retailers to keep up development and re-development momentum in the Town Centre  | Short, Medium and Long-Term |
|                        | Focus on differentiating the Town Centre, making it the District's centre for specialty retail, entertainment/culture, civic uses, and destination restaurants.  | Short and Medium Term       |
|                        | Promote the downtown and available land supply, both vacant and underutilized.   | Short term                  |
|                        | Work with merchants and land owners to improve building facades and displays.  | Short-Term                  |
|                        | Work with landowners of underutilized sites to either redevelop those sites or to sell lands to speed up redevelopment.  | Medium and Long Term        |
|                        | Extend the Town Centre development incentives into the future, but focus them to ensure that commercial is concentrated in viable, well-anchored and themed commercial precincts.  | Short-Medium Term           |
| Urban Design           | Strategies   | Timing                      |
|                        | Continue to create comfortable commercial streetscapes in priority areas through provision of covered walks, well-designed streetscapes, street trees, and maintained walking surfaces and parking lots.   | Ongoing                     |

<sup>20</sup> "Short Term" = immediate to 2 years. "Medium Term" = 2-5 years. "Long Term" = 5+ years.

|  |   |                  |
|--|---|------------------|
|  | Do not create overly detailed streetscapes. This is expensive and has diminishing returns. Focus instead on simple public spaces with quality, weather-resistant materials, and direct resources to businesses to improve their storefront designs and visual merchandising displays. This will be more effective in buoying downtown retail sales. | Medium-Long Term |
|  | Mandate building to a common frontage line with some provision for variance for restaurants to allow patio seating where appropriate or desired for street animation.   | Short-Term       |
|  | Require that a minimum of 60% of first floor building façade surface area of commercial structures be covered in clear glass (excluding doorways).  | Short-Term       |
|  | Do not permit drive-through businesses in the Town Centre.  | Short-Term       |
|  | Consider a beautification grant matching program for small projects covering such items as planters, hanging baskets, boulevard landscaping etc. available to landlords and interested tenants.   | Short-Term       |

### 6.2.2 Sub-Area Opportunities & Strategies

| <b>Dewdney Trunk Road</b>                                  | <b>Strategies</b>   | <b>Timing</b>    |
|--|---|------------------|
|  | Opportunity: Underutilized areas along Dewdney Trunk Road could house a significant portion of future Town Centre Commercial demand, especially in the areas in and around the north end of 224. <sup>th</sup>  |                  |
|  | Encourage redevelopment of Haney Plaza to mixed residential/commercial, and work with the proponent of the mixed-use development at 224 <sup>th</sup> and Dewdney (NW corner) to ensure that project moves forward as the market matures. <sup>21</sup>   | Medium-Long Term |
|  | Consider changing the requirement for ground floor commercial along Dewdney Trunk Road east of 227 <sup>th</sup> Street (as shown in Schedule G of the Zoning Bylaw) to either mandatory “ground floor active use” or optional ground floor commercial (i.e. flexible mixed-use). Active use could include office, gallery, indoor recreation, daycare, institutional space or other publicly accessible space. Removing strict commercial requirements may help to better concentrate the commercial demand in a well-defined ‘core precinct.’ | Short-Term       |
|  | A similar change to Schedule G should be considered for the area of Dewdney west of 222 <sup>nd</sup> Street  | Short-Term       |
| <b>Lougheed: 222<sup>nd</sup> -228<sup>th</sup> Street</b> | <b>Strategies</b>   | <b>Timing</b>    |
|  | This stretch of Lougheed contains many small lots, and assembly will be difficult and costly. Some redevelopment has begun along this stretch, and will continue slowly over the medium-long term (10-30 years).  |                  |

<sup>21</sup> GPRA’s proforma analysis has indicated only marginal viability for concrete highrise development currently. As the market matures, concrete highrise development will be possible.

|  |   |                        |
|--|---|------------------------|
|  | Promote dialogue and partnership between land owners and potential investors/developers to promote development.   | Ongoing                |
|  | Monitor whether economic incentives are appropriate or require modification through periodic 'check ins' with key stakeholders  | Medium-Term, Long-Term |
| <b>Haney Place Mall &amp; Civic Precinct</b> | <b>Strategies</b>   | <b>Timing</b>          |
|  | Animate the public space around Memorial Peace Park. The District should encourage restaurant space to be developed at 224 <sup>th</sup> and McIntosh Avenue, and directly across from the pagoda on the north side of Haney Place Crescent. Food carts are another good active use that could locate around the park.  | Medium-Long Term       |
|  | Encourage better pedestrian connectivity between the civic precinct and Haney Place Mall  | Short-Medium Term      |
|  | Encourage animation of blank walls at the mall with glass and/or other streetscaping.   | Short-Term             |
|  | Encourage redevelopment of the mall. Such redevelopment will be a complex, multi-year undertaking involving partnership between mall owners, anchor tenants and the District. There should be exploration of appropriate incentives and assistance to encourage redevelopment. <ul style="list-style-type: none"> <li>○ Redevelopment of the mall would likely allow for significantly more on-site retail space, as well as office uses and possibly residential.</li> </ul> | Long-Term              |
| <b>East Downtown</b>                         | <b>Strategies</b>   | <b>Timing</b>          |
|  | The area of 227 <sup>th</sup> Street between Dewdney Trunk Road and Lougheed Highway is designated Town Centre Commercial. We recommend re-designating as Flexible Mixed-Use. Ground-oriented medium density housing or live/work units should be permitted if the market demand is there.  | Short-Term             |
|  | Emphasize and encourage land assembly of the blocks on the east side of 226 <sup>th</sup> Street for mixed-use development  | Short-Term             |
|  |   |                        |

## 6.3 WEST MAPLE RIDGE COMMERCIAL DEMAND AND STRATEGIES

### 6.3.1 Floor Area Demand

**GPRA projects that 33% of District-wide commercial demand over the next 30 years will be directed to areas in the West sub-region. This represents 437,000 square feet of additional commercial floor area, beyond the estimated 807,000 square feet in the region today.**

More than 50% of new space demand will be for comparison-type retail, while a smaller but not insubstantial 25% of demand will be for convenience retail and service such as grocery, pharmacy, banks and medical offices. The balance of demand will be for restaurant, coffee shops and pubs (11%), indoor recreation space (3%) and automotive goods and services (9%).

West Maple Ridge is currently the most populated of the sub-regions, although it is projected to lose that title to the Town Centre sometime before 2040. The West is expected to add 10,500 people in the next 30 years.

**Table 23: West Maple Ridge Commercial Demand Projections**

| <b>West Maple Ridge Commercial Demand: 2022, 2032, 2042</b> |               |                |                |
|---|---------------|----------------|----------------|
| <b>Categories</b>   | <b>2022</b>   | <b>2032</b>    | <b>2042</b>    |
| Convenience Goods & Services                                | 25,133        | 66,897         | 109,051        |
| Comparison Goods  | 36,996        | 131,341        | 226,587        |
| Food & Beverage   | 6,418         | 26,576         | 46,927         |
| Entertainment & Leisure                                     | 3,403         | 8,916          | 14,480         |
| Auto Goods & Services                                       | 18,584        | 32,387         | 46,321         |
| <b>Total</b>  | <b>90,534</b> | <b>266,117</b> | <b>443,366</b> |

Demand for additional space in the West is driven by:

- Convenience goods/services spending growth driven by population growth and anticipation of increased flow-through spending along the Lougheed and Dewdney corridors;
- Continued desire of many large and medium sized retailers to locate in modern shopping centre space with good highway and arterial access, visibility and ease of parking.

The land area required to accommodate projected Western retail demand will be between 23 and 38 acres, assuming a range of densities from 0.3 to 0.5 FSR. There are currently 10.9 acres of vacant zoned commercial space in the west, with an additional 12.3 acres underutilized. Development and redevelopment of these sites could accommodate demand for at least the next 20 years. Beyond 2022, additional zoned commercial land will be required to accommodate demand. This additional land will be found through a combination of:

- Higher density redevelopment of some of the 101 acres of currently developed commercial lands;
- Rezoning of lands currently designated for future commercial use in the OCP but zoned for other purposes today.

### 6.3.2 West Maple Ridge General Commercial Strategies

| Design & Land Use | Strategies  | Timing           |
|-------------------|---|------------------|
| Density           | Encourage densification and 'urbanization' of retail plazas over time, as demand allows.  | Medium-Long Term |
| Connectivity      | Improve multi-modal connectivity between commercial developments along Dewdney Trunk Road and Lougheed Highway, and the surrounding residential areas. This could require municipal property acquisition and easements.   | Medium-Long Term |
| Design            | <p>Encourage retail to be developed close to the street, at first through pad development at key site entry/exit points and high visibility corners.</p> <ul style="list-style-type: none"> <li>➤ As demand increases over time, encourage additional development of retail on shopping centre sites from front to back, creating internal roadways lined with streetwall retail.</li> <li>➤ Ensure surface parking is behind retail.</li> <li>➤ Over time, encourage shopping centres to reach higher densities (0.6-0.8 FSR). This would include multi-level retail, structured parking partially wrapped in inline retail tenants, internally-oriented loading, and lower parking ratios (eg. 3.5 spaces per 1,000 square feet.). There are many examples of such projects being developed today in the Lower Mainland, including a new Canadian-Tire and Best Buy-anchored project with a retail density of 0.79 (and overall density of 1.63 including structured parking) on South West Marine Drive in Vancouver.</li> </ul> | Medium-Long Term |
| Regulatory        | Strategies  | Timing           |
| Designation       | There is sufficient designated commercial land supply to satisfy projected demand over the next 20 years, and likely enough supply to satisfy demand beyond assuming increases in site densities.   | Complete         |
| Zoning            | Future rezoning will be required to bring demand in line with the OCP land use plan.  | Ongoing          |
| Zoning            | The separation of CS-1 and C-2 commercial zones along the Lougheed are not desirable or conducive to providing land in a sufficient and timely manner to respond to market opportunity, despite recent amendments to the CS-1 zone that make it more responsive through additional permitted uses. Consider rezoning to C-2.  | Short-Term       |
| Permitted Use     | Large format retail uses going to the West should be clustered along the Lougheed Highway at existing shopping centre sites. We strongly recommend that additional lands currently designated for industrial or other uses <u>not</u> be re-designated/re-zoned for large format retail.  | Ongoing.         |

## 6.4 CORE EAST COMMERCIAL DEMAND AND STRATEGIES<sup>22</sup>

### 6.4.1 Floor Area Demand

**GPRAs projects that 7% of District-wide commercial demand over the next 30 years will be directed to the Core East area, primarily in and near the Albion Neighbourhood. This represents approximately 90,000 square feet of additional floor area, adding to the estimated 19,000 square feet existing in the area today.<sup>23</sup>**

Over 70% of new space demand will be for convenience goods and services (eg. grocery, liquor, financial and health services, pharmacy) and food and beverage (coffee shop, restaurant, pub). The balance will be limited seasonal demand for comparison goods (tourist apparel and sporting goods), perhaps some indoor recreation space, and automotive goods and services.

**Table 24: Core East Commercial Demand Projections**

| <b>Core East Commercial Demand: 2022, 2032, 2042</b> |               |               |               |
|--|---------------|---------------|---------------|
| Categories   | 2022          | 2032          | 2042          |
| Convenience Goods & Services                         | 11,860        | 31,567        | 51,458        |
| Comparison Goods                                     | 482           | 1,711         | 2,953         |
| Food & Beverage                                      | 1,215         | 5,031         | 8,884         |
| Entertainment & Leisure                              | 3,063         | 8,024         | 13,032        |
| Auto Goods & Services                                | 5,575         | 9,716         | 13,896        |
| <b>Total</b>   | <b>22,195</b> | <b>56,049</b> | <b>90,223</b> |

Demand for new retail space in this area is driven by:

- Population growth within the sub-area.
- This sub-area is expected to grow by 7,500 residents over the next 30 years, with associated support for at least 50,000 square feet of convenience goods and services within the area;
- Positioning to capture retail spending flowing from East Maple Ridge;
- Capture of flow-through traffic, primarily north-south along 240<sup>th</sup> Street and east-west along Lougheed.

*From these demand totals, we may discount 20,000 square feet if we assume that the two proposals for neighbourhood serving commercial at 240<sup>th</sup> and 112<sup>th</sup> are approved and these projects are leased. This likely*

<sup>22</sup> The 'Core East' area contains the majority of the Albion Area Plan neighbourhood, including its existing and future commercial areas.

<sup>23</sup> This assumes no large scale retail development on the Albion Flats. If significant retail space is developed at the Flats, this would redirect some of the spending and square footage potential that GPRAs has allocated both to the Town Centre and to the West.



satisfy demand to about 2022 and reduce long term (2042) demand to about **70,000 additional square feet**.

The land required to accommodate 70,000 square feet of demand will be between **6 and 8 acres**. Currently this region has 4.6 acres of zoned commercial land that is vacant or underutilized, and 21 acres of OCP designated commercial lands. The above noted applications are taking place on an estimated 6 acres of commercially-designated land on the west side of 240<sup>th</sup> Street north and south of 112<sup>th</sup>.

**6.4.2 Core East Commercial Strategies**

|  | Strategies   | Timing           |
|--|--|------------------|
|  | <p>In order to accommodate future commercial demand within this sub-area, the District may wish to consider the following:</p> <ul style="list-style-type: none"> <li>➤ Examine potential to expand the designated commercial node on the east side of 240<sup>th</sup> street north of 112<sup>th</sup>. If this site is expanded from an estimated 1 acre today to 5 acres, it could accommodate about 65,000 square feet of space.</li> <li>➤ Consider the potential for the southwest corner of Dewdney Trunk Road &amp; 240<sup>th</sup> Street to evolve into a neighbourhood-serving retail node anchored by the existing fuel station and convenience store.</li> <li>➤ Some future demand could also be a captured through additional development density on Bruce’s Market site at Lougheed and 240<sup>th</sup>.</li> </ul> | Ongoing          |
|  | Design guidelines emphasizing street-wall retail, parking at rear and high-quality storefronts should be applied to future Village or Community commercial centres. The quality of design at the Village node in the Albion Neighbourhood serves as a guide.   | Medium-Long Term |
|  | Note that if retail is developed at the Albion Flats, this would likely redirect some of the spending and square footage potential allocated to the Town Centre and to the West.   |                  |

## 6.5 EAST, NORTH / SILVER VALLEY DEMAND & STRATEGIES

### 6.5.1 Demand in the East

In addition to the Urban Reserve, the East part of Maple Ridge includes land that will remain rural, and is therefore projected to grow modestly in the coming decades. Additional commercial space demand in the East is estimated at about 27,000 square feet by 2042.

**Table 25: East Commercial Demand Projections**

| <b>East Commercial Demand: 2022, 2032, 2042</b> |              |               |               |
|---|--------------|---------------|---------------|
| <b>Categories</b>                               | <b>2022</b>  | <b>2032</b>   | <b>2042</b>   |
| Convenience Goods & Serv                        | 3,000        | 10,000        | 16,000        |
| Comparison Goods                                | 0            | 0             | 0             |
| Food & Beverage                                 | 0            | 1,000         | 2,000         |
| Entertainment & Leisure                         | 0            | 0             | 1,000         |
| Auto Goods & Services                           | 3,000        | 5,000         | 8,000         |
| <b>Total</b>                                    | <b>6,000</b> | <b>16,000</b> | <b>27,000</b> |

Most new demand will likely be absorbed in an ad-hoc fashion at the various commercial nodes scattered across the Eastern area, as shown in Figure 5.

There is also possibility for a future Village-style convenience retail node of between 10,000 and 20,000 square feet at either the southeast corner of Dewdney Trunk Road and 256<sup>th</sup> Street, or at Dewdney Trunk Road and 248<sup>th</sup> Street.<sup>24</sup> Both junctions have qualities that are attractive for retail, namely traffic volumes and visibility.

In the near-term, 248<sup>th</sup> and Dewdney is the most logical location for a village-style convenience retail node, ideally in the 10,000-15,000 square foot range. This site is already served by urban sewer and water, and would benefit from proximity to existing single-family neighbourhoods and the Garibaldi Secondary School. 248<sup>th</sup> is also relatively closer to Silver Valley and could therefore more easily offer convenience retail access to residents of that neighbourhood. Over the medium-long term, additional retail could be constructed at 256<sup>th</sup> and Dewdney. As is shown in Table 25 above, there will be sufficient demand in eastern Maple Ridge for retail at both locations over the coming decades.

From a general regional planning perspective, both the 248<sup>th</sup> and 256<sup>th</sup> nodes are strategic locations for convenience retail and service. Both sites are located within a 5-7 minute drive time of areas as far as 112<sup>th</sup> Avenue in the south, Whonnock Lake in the east, 256<sup>th</sup> and 130<sup>th</sup> Avenue in the

<sup>24</sup> Note that the 256<sup>th</sup> and Dewdney site is designated suburban residential and is not in the Fraser Sewer Area. Neighbourhood serving commercial that is sensitive to the local context would work on this site, but the District should recognize that current servicing constraints would make such a development part of a longer term vision and would require approval from the Greater Vancouver Sewage and Drainage District.

North and Dewdney and 240<sup>th</sup> in the west. Both locations would also benefit from a future Abernethy Connector. Given the relatively rural nature of the surrounding area, this village centre’s primary trade area would likely extend well beyond this 5-7 minute drive time zone.

There is sufficient designated commercial land area in the East to accommodate demand within the projection period.

**6.5.2 Demand in the North**

Demand for retail space in the North will be driven by projected growth of the Silver Valley neighbourhoods, taking into account the intention to retain a significant amount of convenience, food & beverage and recreational spending within the community at both village hamlet nodes and a shopping district along a main street.

Commercial floor area demand in the North is estimated at 84,000 square feet by 2042. With the exception of a very modest amount of convenience space that could be located at Dewdney and 256<sup>th</sup> (perhaps 2-5,000 square feet) and some ancillary food and beverage space in and around the northern industrial areas as they develop further, the balance should be located in the commercial precincts designated for the Silver Valley.

**Table 26: North/Silver Valley Commercial Demand Projections**

| <b>North / Silver Valley Commercial Demand: 2022, 2032, 2042</b> |               |               |               |
|--|---------------|---------------|---------------|
| <b>Categories</b>  | <b>2022</b>   | <b>2032</b>   | <b>2042</b>   |
| Convenience Goods & Serv   | 15,000        | 41,000        | 67,000        |
| Comparison Goods   | 1,000         | 2,000         | 3,000         |
| Food & Beverage  | 1,000         | 4,000         | 8,000         |
| Entertainment & Leisure  | 1,000         | 4,000         | 6,000         |
| Auto Goods & Services  | 0             | 0             | 0             |
| <b>Total</b>   | <b>18,000</b> | <b>51,000</b> | <b>84,000</b> |

The Silver Valley Area Plan designates four areas for commercial development, all to be developed as ‘pedestrian-oriented mixed-use shopping streets:’

- **River Village:** The commercial heart of Silver Valley, providing retail, service, office and civic needs for local residents;
  - Limited to 110,000 square feet (90-100,000 serving local population with balance as destination space);
  - May include mixed-use;
  - Expected to comprise personal, business services, entertainment services, general retail, food and beverage, and ‘tourist destination’ uses.
  
- **Blaney, Forest and Horse Hamlets:**

- Planned as complete villages with housing, school, parks, transit and basic commercial needs in the form of a corner store of 560 square feet.

There is sufficient designated commercial area to accommodate demand to the projection horizon.

### *6.5.3 North/Silver Valley and East Commercial Strategies*

- While there may be insufficient commercial demand to fill the entirety of the 110,000 square foot commercial main street in Silver Valley in the next 30 years, **all of the designated commercial space should be retained and not converted to other uses (e.g. more residential), as this is an important 'land bank' for the future.** There is also potential for the main street to contain non-commercial active uses such as branch libraries, community halls, or even outdoor space for community gathering and festivals.
- With regard to the Silver Valley Hamlets, we recommend retaining the designated 560 square feet of commercial space within each.
- The East has sufficient designated commercial area and will evolve organically as demand allows.
- We do not recommend having a separate 'tourist commercial' designation within Silver Valley.

## 6.6 RETAIL, SERVICE COMMERCIAL AT ALBION FLATS

The retail demand allocations undertaken for this study assumed that virtually no future retail would be developed at the Albion Flats in the Core East sub-area.

With the pending development of a shopping centre at the Kwantlen lands to the east and the potential to infill large scale retail along the Lougheed corridor to the west, we do not believe there is a pressing community need to open the Albion Flats for large-scale retail development at this time. Instead, given the dearth of quality lands for family-supporting jobs and industries in the District, we recommend that any future exploration of ALR exclusion for part of the Albion Flats focus on developing it as a mixed employment node with a smaller retail component near 105<sup>th</sup> Avenue.

While the community has expressed desire to see a “Morgan Crossing”<sup>25</sup>-style retail development in Maple Ridge in the near future (with a mix of street-front commercial uses, residential above and public amenity), and while many feel that the Albion Flats is the best ‘blank slate’ on which such a development could be created, we believe that the Town Centre should be prioritized as the best area for a development of this nature. There has been a recent application for a mixed-use development at Port Haney, within the Town Centre. We believe that this is an appropriate site for this type of development as it is within the Town Centre Area Plan, and as it provides the public with much needed access to the waterfront in a high quality environment.

**Figure 7: Aerial View of Morgan Crossing, Surrey**



Source: Morgancrossing.ca

<sup>25</sup> Morgan Crossing is a mixed-use residential/retail project in Surrey. It incorporates large format anchors in both pad and inline locations, a commercial ‘high street’ with angled parking, and multiple levels of residential above all commercial space.

## 6.7 SYNOPSIS OF COMMERCIAL DEMAND AND STRATEGIES

In sum, the 5 geographic sub-areas of Maple Ridge will require between 72 and 112 acres of land to accommodate projected retail and service commercial demand.

As shown in the table below, each sub-district of Maple Ridge currently has sufficient designated land capacity to accommodate projected demand for retail and service commercial over the next 30 years. It should also be kept in mind that relatively conservative FSR assumptions have been used to make these land projections, even in the 'higher density (i.e. low additional land) scenarios. If the District effectively promotes and works with the development community to bring higher-density commercial development and redevelopment to the District, both within and outside the Town Centre, land requirements will be lower.

**Table 27: Commercial Lands Required by 2042 and Designated Today**

| Commercial Lands Required for Retail & Service Commercial by 2042 and Designated Today (acres) |                             |            |                        |            |                |
|--|-----------------------------|------------|------------------------|------------|----------------|
|  | Additional Required by 2042 |            | Total Required by 2042 |            | OCP Designated |
|  | Low                         | High       | Low                    | High       |                |
| Town Centre  | 35                          | 55         | 154                    | 174        | 186            |
| West   | 23                          | 38         | 125                    | 140        | 181            |
| Core East  | 6                           | 8          | 17                     | 19         | 21             |
| East   | 2                           | 3          | 8                      | 9          | 21             |
| North/Silver Valley  | 6                           | 8          | 29                     | 31         | 36             |
| <b>Total</b>   | <b>72</b>                   | <b>112</b> | <b>334</b>             | <b>374</b> | <b>446</b>     |

In the near-term, the zoning bylaw should be modified to better differentiate between some zones (e.g. C-1 and C-2) or merge zones while being less prescriptive on permitted uses. In the long-term, transition the bylaw to one emphasizing density/design/building envelope.

For the Town Centre, the key will be to take advantage of emerging commercial trends and build on the great momentum generated by the new anchor tenants and upgrades occurring at Haney Place Mall. Extend the incentives package into the future, and maintain close contact with land owners and potential investors to ensure that the incentives are properly targeted and relevant. In the long term, encourage redevelopment of the mall site to a pedestrian-oriented and mixed-use project. In the short and medium term, encourage redevelopment of underutilized plazas along Dewdney Trunk Road to modern commercial space that takes advantage of emerging commercial design and leasing trends.

The West will continue to be an auto-oriented commercial landscape, but the design of these spaces can be improved over time. Encourage pad development at corners, street-wall development along arterials and 'reverse L' plazas that place parking and access to the rear while creating some forms of street activation. Also, encourage more 'urban' style commercial to cluster at major intersections along the corridor.

In the East Core, much of the future demand should be directed to the designated commercial areas at 240<sup>th</sup> Street and 112<sup>th</sup> Avenue. There may be potential to expand the designated site on the east side of 240<sup>th</sup> to accommodate more commercial space in the future. There will also be potential to turn the Bruce's Market site into a more comprehensive village node.

In Silver Valley, the areas designated for commercial should be retained to accommodate demand in the 30-year period and beyond. Some of the commercial areas could also be used for other 'active' non-commercial uses such as civic and community gathering space.

The East will see bits and pieces of commercial expansion over time, and this will occur in an ad-hoc manner at the designated commercial sites.

## 7.0 OFFICE SPACE DEMAND & RECOMMENDATIONS

### Highlights:

- 3,000 to 4,500 employees requiring office space are expected to be added to the Maple Ridge market over the next 30 years. This translates to 30-50 acres of land demand.
- At least 25% of future office demand will be directed to industrial/business parks.
- There will be growing demand for high-amenity business park space in Maple Ridge.

### 7.1 ISSUES

- Office development in the Maple Ridge market is likely to occur on a relatively small scale, speculative basis in the near term.
- In the longer term a large office park-type development would likely require a sizeable anchor tenant, for which there would be competition from other municipalities and developments.
- In some municipalities there are office space building requirements as part of large mixed-use developments. (e.g. Coquitlam Town Centre). Here, developers are required to provide office space as a proportion of overall built floor area. While such requirements do create town centre office inventory – a long-standing goal embedded within Regional plans and municipal plans for decades – this space is most often built at a loss by the developer. The space is effectively ‘cross-subsidized’ by other components of the developments (typically residential), and in many cases the spaces sit vacant waiting for a market to emerge. This is a method of creating a long term ‘bank’ of space for a desired future mix.
- The issues at hand for Maple Ridge are: (1) how much office space demand will there be in District over the next 30 years, (2) how much of that office space is likely to be demanded in office/industrial park environments vs. other areas, and (3) what strategies can the District implement to accommodate strategic office development in the future?



## 7.2 STAKEHOLDER COMMENTS

During the stakeholder sessions in June 2012, the following issues related to office space were raised:

- It was suggested that municipal land assembly in the Town Centre would help with both retail and office development, likely in mixed-use environments;
- Many felt that more office space will be needed to attract high-tech businesses to Maple Ridge. This space will likely be built speculatively, and should be in the Town Centre or in new dedicated high-amenity business park space;
- There were those in favour of clustering office in the Town Centre, and others who would discourage a single office area in favour of more dispersed office in “high amenity” business park environment(s);
- Many felt that the most appropriate future use at the Albion Flats is for business park-type space rather than retail;
- Wherever office space is located, it should be clustered in a way that allows for transit service.

## 7.3 OFFICE INVENTORY

Maple Ridge commercial business inventory data indicates that the District has approximately 250,000 square feet of office space located in office buildings downtown or in smaller offices intermingled with retail uses.<sup>26</sup> There are 230,000 square feet of office space in the Town Centre, with an additional 20,000 in the Lougheed/Dewdney area.

While no reliable data exists on the share of office space within industrial parks, a cursory visual survey and discussions with tenants and brokers leads us to believe that between 5% and 10% of industrial floor area could be classified as office space. Given an inventory of 2.2 million square feet of floor area in industrial parks, the estimated office component is between 110,000 and 220,000 square feet.

## 7.4 OFFICE DEMAND

GPRA’s comprehensive employment forecasting, detailed previously in Section 3.0, examined the extent to which employees in each employment sector are likely to be located in office space in the future, and both current and trending office space utilization ratios (i.e. the number of square feet

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<sup>26</sup> Note that much of the 790,000 square feet of office space inventory mentioned in the 2004 Maple Ridge Commercial Land Use Study has been re-classified in this study as “financial services” and “health services” and therefore appears in the retail/service commercial inventory and projections.

per employee by employment sector). Using this forecasting method, GPRA has determined that:

- Of the 16,200 to 21,700 additional employees expected to be added to the Maple Ridge employment base in the next 30 years, between **4,300 and 6,300 are expected to be located in some type of office space.**<sup>27</sup>
- Over the next 30 years, the trend will be toward fewer square feet per office employee across nearly all employment sectors. We have accounted for this trend in our employment forecasting.
- To accommodate future office-based employees, Maple Ridge will require between **30 to 50 acres of land** on which office can be constructed.
- We estimate that **at least 25% of required land** (between 7.5 and 12.5 acres) will be within industrial/business parks, with the balance locating mostly in the Town Centre at lands designated for commercial, flexible mixed-use, and institutional. There will also be some office space demand directed to the Lougheed/Dewdney corridor to the west, primarily for business services and health centres.
- As currently designated, there will be sufficient land area in the Town Centre to accommodate projected office demand provided that at least some of that demand is co-located in mixed-use formats with retail/service commercial, residential or both.
  - The location of office space within mixed-use formats is the most likely means by which additional speculative office space will be added to the Town Centre, given that current and projected office lease rates are likely insufficient to allow for an economically feasible stand-alone office project (at least in the near-term).
- Along the Lougheed/Dewdney corridor to the west there is sufficient land area to accommodate all types of commercial for the next 30 years, including office development.
- There are trends around the region indicating an uptick in demand for high-amenity, transit-accessible office park space. Lease rate increases in Vancouver are pushing many businesses to Surrey and Langley, and the trend is toward a continued movement of demand east.

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<sup>27</sup> This does not include people in 'office-type' job sectors working in home-based businesses.

## 7.5 RECOMMENDATIONS

| Business Park | Strategies   | Timing            |
|---------------|--|-------------------|
|               | <p>To better accommodate demand for office space within business park environments, it is recommended that the District modify the M-3 zoning bylaw restriction stipulating that accessory office use “not exceed 25% of the gross floor area of the principal use” to instead permit office as a “principal use” for certain types of businesses. It is recommended to allow professional offices such as engineers, architects, consultants, and the like within the M-3 zone. Businesses such as medical / dental, lawyers, accountants, beauticians, businesses, hair salon, and the like should not be allowed in the M-3 zone as these uses should be located in commercial areas.</p> | Short-Term        |
| Town Centre   | Strategies   | Timing            |
|               | <p>The Town Centre Commercial zone (C-3) permits various types of office-related uses (e.g. business services, professional services, financial services), and the Town Centre Area Plan encourages office in mixed-use development within the “Central Business District.”</p> <ul style="list-style-type: none"> <li>➤ To encourage office development in mixed-use environments within the CBD, a bonus density provision should be explored whereby residential density bonuses are used to encourage additional employment generating space.</li> </ul>   | Short-Medium Term |

## 8.0 INDUSTRIAL SUPPLY, DEMAND & STRATEGY

### 8.1 ISSUES

Maintaining a supply of quality industrial lands in Maple Ridge is critical to the District's future, as businesses that use industrial land are important sources of employment. Total employment on industrial lands in Maple Ridge today is estimated at nearly 7,700, or 29% of total District employment.

Currently, the majority of "ready to develop" industrial lands in Maple Ridge are in the north – primarily at Kanaka Business Park – which, while attractive for certain sectors, is too removed from major transportation routes for most businesses. It is expected that accessible industrial land supply will be a critical issue for the District moving forward.

Ultimately it is expected there will be demand for approximately **200 acres of industrial land in Maple Ridge before 2041**. The District will need to ensure these lands are ready for development to meet its employment growth goals.

#### *8.1.1 Challenges & Opportunities*

##### Regional Context

- Demand for industrial space north of the Fraser River is growing, due to cheaper lands, as well as a result the new Golden Ears and Pitt River Bridges.
- Pitt Meadows has serviced and vacant industrial lands currently available which will attract most businesses considering moving north of the Fraser River before Maple Ridge.
- The current industrial supply in Pitt Meadows is expected to last for the next 10 years, at which point Maple Ridge will see an increase in development pressure on industrial lands.

##### Maple Meadows Industrial Park

- Non-industrial uses in the Maple Meadows Industrial Park is controversial given it is the most sought after industrial space in the District.

##### Albion Industrial Area

- The desire to intensify land usage in Albion Industrial Park must be balanced with recognizing business sectors such as wood manufacturing located in Albion Industrial Park which contributes significant jobs to Maple Ridge.
- The Albion Industrial Park provides significant redevelopment opportunities, but so far landowners in the area have displayed little interest in consolidation or redevelopment. Providing incentives for the redevelopment of these Albion lands will be important for the District. The Albion Industrial Park was

designated M-3 (Business Park) in 2006, and development in this area could adhere to the M-3 zoning without regional referrals.

- Given the waterfront location of the Albion Industrial Park there has been discussion about the potential for mixed use development in the area. This potential is tempered by high development costs that would be required, including a new dyke and improved access. There have also been proposals for a mixed-use waterfront development within the Town Centre on non-industrially designated lands. It is believed that the Town Centre is a better location for this type of development, and the Albion Industrial Area should remain industrial over the course of this study period.

#### Lougheed Corridor

- Commercial lands along the Lougheed Highway, especially with CS-1 zoning, would work well for light-industrial / commercial businesses, but the small parcel sizes may deter redevelopment.

#### Agricultural Land Reserve

- According to conversations with ALC officials recent changes in how the Crown Agency operates would see the ALC dedicate more time to promoting agricultural uses and uses that support agriculture on ALR lands. With the ALC, Maple Ridge has the opportunity to promote uses that compliment farm production on ALR lands including processing, accessory produce sales, agri-tourism, agro-industrial uses, etc.
- The Agricultural Lands Commission has not permitted many ALR lands to be re-designated for industrial purposes in recent years. Counting on exempted ALR lands to provide Maple Ridge with its needed additional industrial lands is a risky strategy.
- The ALC was approached during the writing of this study, and it confirmed that the Commission position on granting ALR exclusions has changed and lands with agricultural potential would have less chance at receiving an exclusion than in the past.
- The Pelton Lands in particular was offered as an example of a site that would be even less likely to receive an ALR exclusion than in the past, due to a more clear process for reviewing applications. The 2010 application for excluding the Pelton Lands was unanimously denied by the ALC.
- Beyond being more strict with ALR exclusion applications, the ALC is becoming more stringent with application submissions, increasing the time and cost required by the applicant.
- Regarding the Albion Flats lands south of 105<sup>th</sup> Avenue, the ALC has recommended to the District of Maple Ridge that it pursue on large application that includes all of the lands south of 105<sup>th</sup> Avenue rather than multiple applications for these lands.

- The ALR is currently considering applications for excluding lands north of 105<sup>th</sup> Avenue on the Albion Flats. A timeline for these decisions was not provided.

#### Non-Industrial Uses in Industrial Areas

- The Districts position on non-industrial uses on industrial lands, such as dance studios or drive-through restaurants, requires review as some question allowing these uses on industrial lands.

#### Industrial Uses adjacent to Residential Areas

- There are currently businesses with industrial uses operating adjacent to residential areas, typically under the CS-1 zone. There may be pressure to rezone these properties for residential use. Allowing for non-intrusive light-industrial uses, such as those allowed in the CS-1 zone increases employment lands. These types of uses should be protected and promoted.

### 8.1.2 Stakeholder Comments

Stakeholders had a number of comments during the workshops held in June, 2012 regarding industrial lands:

- Designate more industrial lands.
- Industrial areas lack amenities, such as restaurants or personal services nearby. These amenities will make industrial areas more attractive for companies and their employees.
- Completion of Abernethy Road is required to make the northern industrial areas more attractive.
- Re-application to have the Pelton Lands excluded from the ALR was brought up by a number of attendee's, who suggested the application should stress that the lands would be used for agro-industrial uses.
- Albion Flats and Albion Industrial Area should be considered as a 'single-node' with a full mix of uses including housing, retail, industry and a new West Coast Express Station.
- Non-industrial uses, such as dance studios, should not be allowed in industrial areas. Although other stakeholders suggested drive-through restaurants should be allowed.

## 8.2 REGIONAL INDUSTRIAL MARKET TRENDS

### 8.2.1 Broad Regional Trends

In very broad terms there are two major trends impacting industrial demand in the Metro Vancouver area:

1. Increasing demand for industrial lands near the ports and the Gateway project.

2. Demand for more affordable industrial lands pushing users east to Langley, Abbotsford and Chilliwack.

The Pitt Meadows / Maple Ridge industrial lands are more likely to be the beneficiary of industrial users looking for affordable industrial lands, than users who have strong business connections with Port of Vancouver activity.

From a user / developer perspective, industrial lands in Pitt Meadows and Maple Ridge are considered similar, especially when considering lands in western Maple Ridge.

Much of the demand for industrial lands in the Metro region is looking to supply traffic from the ports.

### *8.2.2 Types of Businesses on Industrial Lands*

There are many different types of businesses that use industrial land in Metro Vancouver. However, according to a recent study completed for Metro, it was determined that there are three business sectors that together account for nearly 55% of all jobs on industrial lands.<sup>28</sup> These are:

- Manufacturing
- Wholesale Trade
- Transportation & Warehousing

The sector with the next highest amount of employment on industrial lands was retail trade.

There is also a trend to greater *flexibility* on industrial lands in terms of both business type and building form. Buildings with an increasing amount of office space are being permitted on industrial lands across the region, and this should be welcomed. For example the Rivers Edge Business Park in Port Coquitlam is based on an M-3 zoning, but allows up to 40% office space.

The fact that Maple Ridge has been successful in attracting manufacturing businesses from a regional perspective likely is due to the following factors:

- Maple Ridge is home to a number of wood manufacturing companies, such as shingle manufacturers;
- Manufacturing companies have less dependence on being close to transportation networks than wholesale trade or transportation companies, thus allowing these firms to take advantage of lower cost industrial lands in Maple Ridge;
- Manufacturing companies are often owner operated, and owners are likely to be attracted to the lifestyle in Maple Ridge.

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<sup>28</sup> Metro Vancouver, Industrial Land Intensification Analysis, Eric Vance & Associates, 2011

### *8.2.3 Building Configuration*

Metro Vancouver has seen increasing demand for large industrial space with tenants regularly looking for buildings between 100,000 to 200,000 square feet.

Speculative developments are now being built to include large 100,000+ square foot buildings, allowing the market decide how the buildings will be internally divided. Speculative developments also tend to be flexible in terms of building access and space for truck loading and turning.

Much of the Maple Ridge industrial building supply was built by owner occupiers or in strata developments which are typified by smaller spaces. Due to these small spaces, rents per square foot in Maple Meadows can seem higher when compared to other industrial lands in the region, but similar space in Maple Ridge is typically less expensive than Langley or Coquitlam.

### *8.2.4 Other Metro Vancouver Trends*

- Lands that are considered to have a high agricultural value will not be excluded from the ALR. Lands with lower agricultural value may be approved for exclusion, but are subject to conditions imposed by the ALC including the improvement of agricultural lands elsewhere.
- An application to the ALC has been made for the removal of an additional 600 acres of land in Tsawwassen for industrial development. If this application is accepted it will have an impact on industrial development in other areas in Metro Vancouver.
- The issue of the industrial land supply in Metro Vancouver is garnering more attention, with some commentators suggesting an Industrial Land Reserve should be created. This comment highlights issues of past rezoning of industrial lands for residential or retail uses, and the recognition that industrial lands are critical for employment in the region.
- The Gateway Project is intended to improve the movement of people and goods throughout the region. Investments in the South Fraser Perimeter Road and the expansion of Highway 1 have increased the value of industrial lands adjacent to recent infrastructural improvements.
- The Tsawwassen First Nation was granted full municipal-type jurisdiction over 1,800 acres of land in 2008, of which approximately 335 acres are intended to be developed for industrial purposes to service the Deltaport container terminal.



## 8.3 MAPLE RIDGE INDUSTRIAL TRENDS

### 8.3.1 *Golden Ears Bridge Construction*

- The Golden Ears Bridge has improved the marketability of industrial lands in Maple Ridge and Pitt Meadows. It is believed that developers and users are taking some time to understand which users will now have interest in locating in the area.
- There is currently a significant amount of vacancy in the Maple Meadows Business Park. It is estimated that only 75% - 80% of built space is leased. Recent departure of businesses that were involved with Golden Ears Bridge construction is believed to be responsible for some of this vacancy.

### 8.3.2 *Pitt Meadows Industrial Supply*

- Pitt Meadows has roughly 200 acres of industrial land that is either currently marketing or coming soon to the market. This amount of supply could take up to 10 years to absorb and will impact the extent to which users cast their view to Maple Ridge.

### 8.3.3 *Northern Industrial Absorption and Outlook*

- In recent years development of northern industrial lands in Maple Ridge has begun, with approximately 55,000 sq. ft. of strata industrial space built and mostly sold at Webster's Corners. This has been a successful project, attracting small businesses to the northern industrial areas.
- The Kanaka Business Park in the north has struggled. Attracting large users to the north on sites with septic servicing has proven difficult and gives an indication of the current limitations of the northern industrial lands.
- Industrial developers and users point to the need for improved road access to the northern industrial lands. Development of the Abernethy Road connector would require funding from the Province and Translink.

### 8.3.4 *Other Trends*

- Many of the users of industrial lands in Maple Ridge are smaller companies. Large sites that could attract large users do not currently exist, although this could change with the rezoning proposal for 40 acres south of Maple Meadows.
- If rezoned for industrial use, the lands south of Maple Meadows Business Park would be an excellent source of new supply that could attract larger tenants.
- There are a significant number of companies, estimated at almost 150, that own strata-commercial space on industrial lands in Maple

Ridge. This has been noted as a trend across the Metro Vancouver region, and one that suits Maple Ridge with its large number of owner-operated companies.

## 8.4 INDUSTRIAL LAND & EMPLOYMENT INVENTORY

### 8.4.1 Metro Industrial Lands Overview

Historical statistics that track industrial development in Metro Vancouver have traditionally combined Pitt Meadows and Maple Ridge. Both communities are commonly considered the same market from an industrial land user perspective.

Figure 9 below shows the historical growth of industrial space across Metro Vancouver, as well as the vacancy rate for industrial space in the region. The impact of the global economic slowdown can be seen after 2007, through both an increasing vacancy rate and a reduction in the rate of growth of new industrial supply. While vacancy rates have decreased in the years since, they are still relatively high compared the 13 year average. Industrial land supply in 2012 Q2 is approximately 170 million square feet.

Figure 8: Metro Vancouver Industrial Space (sq.ft.), 1999 to 2012

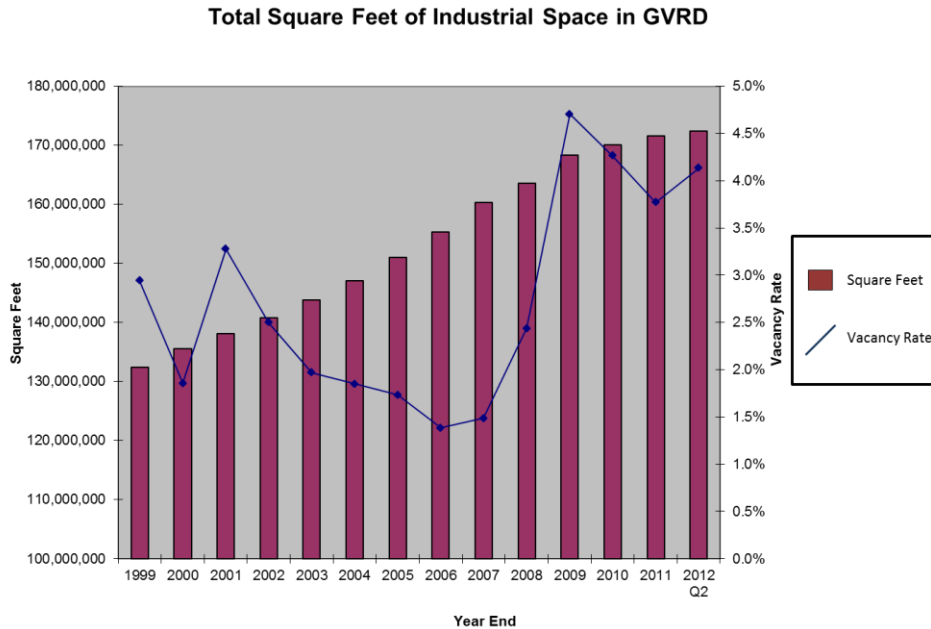
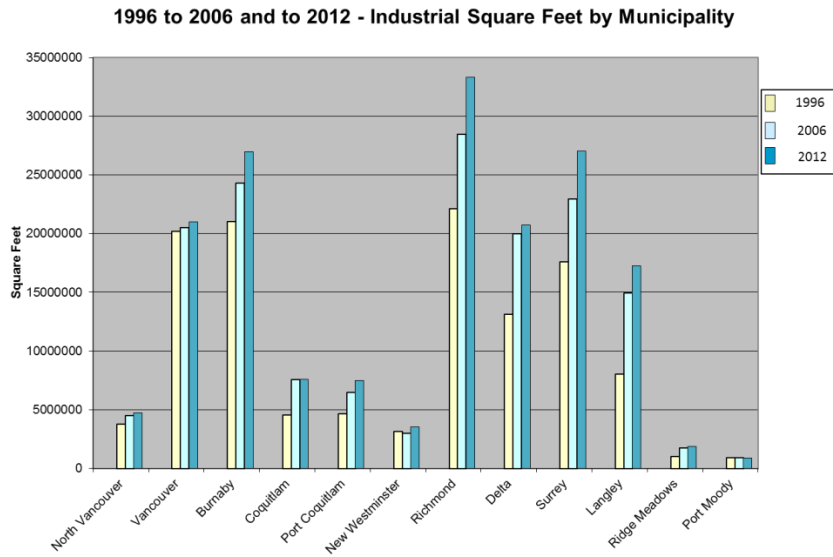


Figure 10 shows the total industrial square footage by select municipality in 1996, 2006 and 2012. Maple Ridge and Pitt Meadows are combined.

Figure 9: Industrial Square Feet by Municipality: 1996, 2006, 2012



Maple Ridge and Pitt Meadows combine to account for approximately 1% of the total industrial supply in Metro Vancouver. Since 1996, the proportion of industrial space in Maple Ridge and Pitt Meadows has been growing slightly.

#### *8.4.2 Maple Ridge Industrial Land Supply & Utilization*

Based on District data, there are 2.2 million square feet of built industrial floor area in Maple Ridge today. This industrial space is found in the following 6 industrial areas: Southwest, Central Maple Ridge, Albion, North, Whonnock, and Ruskin.

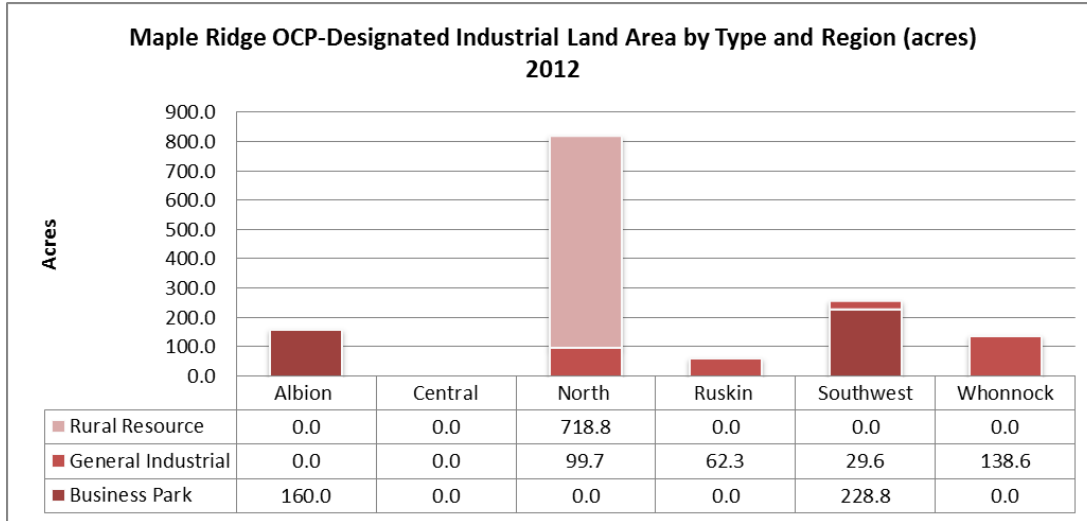
**Figure 10: Maple Ridge Industrial Areas**

The amount of designated industrial lands has not changed in Maple Ridge in recent years. However, it is understood that nearly 90 acres of zoned industrial lands in the Albion Industrial Area either (a) part of the Kanaka Creek Regional Park, or (b) likely to be rezoned for residential use in the near future. These lands have been subtracted from the zoned totals below, leaving approximately 160 acres of industrial land in the Albion Area.

The issue of use on industrial lands is important in Maple Ridge, and it should be noted that a total of almost 390 acres in both Southwest Maple Ridge and the Albion Flats have been designated for business park. As shown in Figure 11 below, the vast majority of lands designated for industrial use are in northern Maple Ridge.

An additional 40 acres in Southwest Maple Ridge is currently applying for rezoning to M-3 or Business Park.

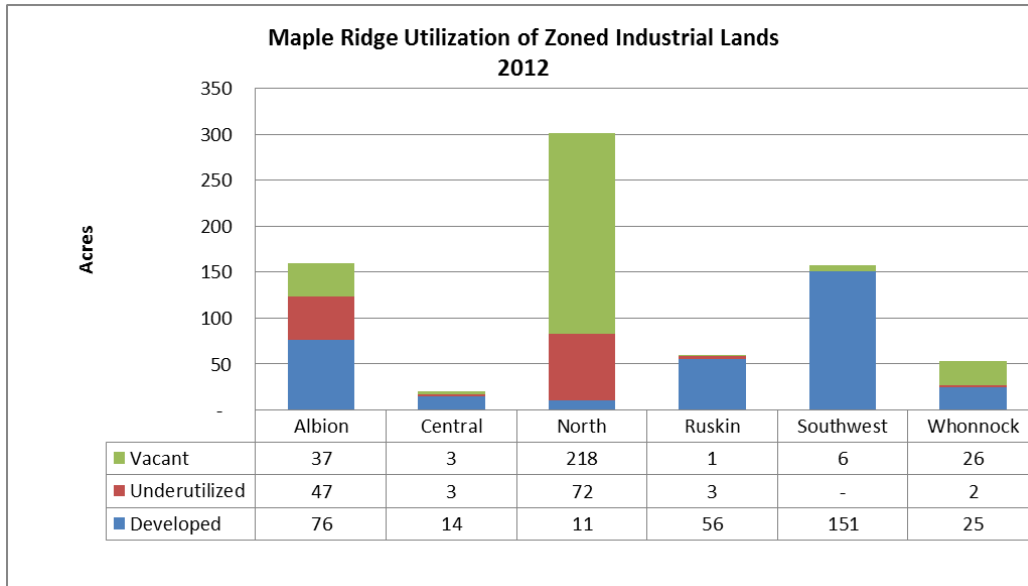
**Figure 11: Designated Industrial Land by Type and Region**



Since 2010, some changes in the way industrially designated lands are zoned include 1 acre changing from M-2 (General Industrial) to M-3 (Business Park) to accommodate the Kingfisher Pub in the Albion area. In 2010 an additional 11 acres were rezoned to M-2 (General Industrial) in the North.

Figure 12 clearly indicates that the majority of underutilized and vacant industrial lands are found in the Albion area and in North Maple Ridge:<sup>29</sup>

**Figure 12: Industrial Land Utilization**



<sup>29</sup> The distribution of industrial lands by utilization uses the total areas multiplied by the proportion of lands determined to be developed, vacant or underutilized according to the District of Maple Ridge.

The north has the largest supply of vacant and underutilized industrial lands, but due to the distance and poor connectivity, these lands are not in high demand with industrial land users or developers.

The District's six industrial areas (Figure 10) have the following key characteristics:

#### Northern Maple Ridge

- Includes almost 300 acres of zoned industrial lands, zoned mostly M-2 (General Industrial) with some M-4 (Gravel Pit)
- 218 acres of vacant land and 72 acres of underutilized industrial land
- Businesses in the north were represented by a wide variety of sectors including manufacturing and warehousing found in smaller strata space as well as larger tracts of land used by the forestry sector.
- The area employs approximately 50 people.
- While there is plenty of supply in this area, its distance from major arterials is seen as a major setback. Completion of the Abernathy Connector would improve access, but it will still be an issue for many potential users.

The North employs approximately 50 people.

#### Southwest

- Almost 155 acres of zoned industrial lands, zoned mostly M-3 (Business Park) with some M-2 (General Industrial).
- Approximately 6 acres of vacant land.
- While there is limited vacant land, there is reportedly up to 15% to 20% vacancy in Maple Meadows' built space at the moment, with companies involved with building the Golden Ears Bridge vacating their space. It is also likely that the ICBC Air Care site will soon be available for redevelopment.
- There is an application to rezone 41 acres of land from residential to M-3 (Business Park) just south of Maple Meadows Business Park.
- Southwest Maple Ridge is the most sought after location for industrial space in the District due to its proximity to the Golden Ears and Pitt River Bridges.
- Includes two distinct industrial areas. The first, Maple Meadows is zoned M-3 and is primarily light industrial. The second is zoned M-2 and includes a wood processing plant.
- Users in Maple Meadows include school bus parking, manufacturing, warehousing, dance and martial arts studios as well as wholesale trade and automotive services.
- GPRA estimates that the southwest employs approximately 5,800 people.

#### Central Maple Ridge

- Includes a total of almost 20 acres of zoned industrial land, including 3 acres of vacant land and 3 acres of underutilized land.
- Mostly zoned M-1 or M-2 these lands are either located along the Lougheed Corridor or south of the Town Centre near the Fraser River.
- Land uses include manufacturing, warehousing, construction, and wholesale trade.
- There are other light industrial uses in Central Maple Ridge located on lands zoned CS-1 which allows for some light industrial uses.

The Southwest and Central Areas combine to employ an estimated 5,800 people.

Albion

- Almost 160 acres of zoned industrial lands, zoned mostly M-3 (Business Park) with some M-2 (General Industrial).
- 37 acres of vacant land and 47 acres of underutilized industrial lands.
- Major businesses in the area include construction wood processing / manufacturing, transportation and warehousing.
- The Albion area is seen to have redevelopment potential, but the existing businesses do employ a significant number of people.
- Based on our estimates the Albion Industrial Area employs approximately 1,000 people.

Albion employs approximately 1,000 people.

Whonnock

- Over 53 acres of zoned industrial lands, zoned entirely M-2 (General Industrial)
- 26 acres of vacant lands with 2 acres of underutilized lands
- Located along the Fraser, in some cases with some narrow parcels, the Whonnock area is typified by wood product related companies.

Whonnock and Ruskin combine to employ approximately 800 people.

Ruskin

- Almost 60 acres of zoned industrial lands, zoned entirely M-2 (General Industrial).
- 1 acre of vacant lands, and 3 acres of underutilized lands.
- Located on the southeastern boundary of Maple Ridge, Ruskin primarily is home to forestry related companies including lumber mills, and shingle manufacturing.
- The Waldun Forest Products Mill recently burned down which employed roughly 200 people. The company is currently considering whether it will rebuild the mill.
- Whonnock and Ruskin combine to employ approximately 800 people according to our estimates.

**8.4.3 Employment on Industrial Lands**

There are approximately **7,700 jobs** located on industrial lands in Maple Ridge.

**Table 28: Employment by Sector on Industrial Lands**

| <b>Estimate of Jobs on Industrial Lands in Maple Ridge<br/>By Employment Category</b> |              |
|---|--------------|
| Accommodation and Food  | 60           |
| Business Commercial Services  | 850          |
| Construction  | 820          |
| Education   | 70           |
| Finance, Insurance, Real Estate   | 80           |
| Health & Welfare / Public Administration  | 330          |
| Information, Cultural, Arts & Recreation  | 100          |
| Manufacturing   | 4,330        |
| Primary   | 20           |
| Retail  | 260          |
| Transportation, Communication, Utilities  | 170          |
| Wholesale Trade   | 600          |
| <b>Grand Total</b>  | <b>7,690</b> |
| <b>Source: GPRA, HBLG</b>   |              |

The sector with by far the largest amount of employment was manufacturing.

When employment is split into detailed subcategories, key employment subsectors begin to stand out. For example:

- 1,500 jobs in 'machinery & equipment'
- 980 jobs in 'sawmill, shake & shingle'
- 490 jobs in 'wood products / lumber'
- 400 jobs in 'metal'
- 480 jobs in 'unclassified manufacturing'

These numbers indicate the importance of the forestry and wood manufacturing sector to Maple Ridge. These jobs should be considered when plans for redevelopment of District industrial areas are proposed.



## 8.5 COMPETITIVE SUPPLY

Outside of the lands in southwest Maple Ridge, it is generally accepted that industrial lands in Maple Ridge are not ideally located, and therefore will have difficulty competing against available lands nearby. The following are some important highlights of competitive industrial supply from adjacent municipalities:

### 8.5.1 *Pitt Meadows*

- Due to their proximity to the Pitt River Bridge and the Golden Ears Bridge, industrial lands in Pitt Meadows will be more attractive than Maple Ridge lands outside of southwest Maple Ridge.
- There are approximately 200 acres of developable industrial lands in Pitt Meadows.
- At the time of this report the first building on site, 75,000 square feet in size, is almost fully leased. A second building with 110,000 square feet is planned, followed by a third with 25,000 square feet.
- The marketing team is still looking for a large single tenant who could use a building between 300,000 to 500,000 square feet.
- It is believed that the absorption of this site is going well, especially considering how the market for industrial space has slowed in 2012.
- Industrial space in Pitt Meadows is costing \$5.25 per square foot for warehouse space, and \$6.50 per square foot with industrial space with office space.

### 8.5.2 *Mission*

- Mission has made available 40 acres of industrial land in the Silver Creek area, though reportedly only 7 acres remain.
- The older industrial space adjacent to downtown has fractured ownership, which will delay redevelopment.

### 8.5.3 *Coquitlam*

- Coquitlam has 36 acres of vacant industrial land and approximately 200 acres of underutilized industrial lands.
- With tolls being placed on the new Port Mann Bridge Coquitlam and Maple Ridge will be in more direct competition for tenants.

## 8.6 PROJECTED DEMAND

Demand projections for industrial land have been conducted using two methods.

*Method #1:* The first forecast was based on projected employment growth and the estimated square feet required for employees on industrial lands. There were high and low forecasts created, the former based on the Metro Vancouver projections, and the latter created by GPRA. Land utilization per employee was based on forecasted jobs per category, and the estimated employment density per employment type.

*Method #2:* The second forecast was based on the historic growth of industrial lands in Metro Vancouver, and the anticipated roll of Maple Ridge within Metro Vancouver. Based on forecasts that regional share of employment in Maple Ridge will increase, and the share of industrial lands Maple Ridge will also increase incrementally.

These two forecasts have led to the estimate that Maple Ridge will require between **170 and 230 acres of industrial land by the year 2040**. The following table highlights the industrial demand based on the two separate methodologies:

**Table 29: Industrial Land Demand Forecast**

| <b>Industrial Acres Required, Maple Ridge (Cummulative)<br/>2015-2040</b> |  |   |                                      |
|---|--|---|--------------------------------------|
|   | <b>Metro Employment<br/>Based Forecast</b> | <b>GPRA Employment<br/>Based Forecast</b> | <b>Absorption<br/>Based Forecast</b> |
| <b>2020</b>   | 29   | 22  | 22                                   |
| <b>2025</b>   | 59   | 44  | 50                                   |
| <b>2030</b>   | 135  | 100                                       | 103                                  |
| <b>2035</b>   | 180  | 133                                       | 153                                  |
| <b>2040</b>   | 230  | 170                                       | 210                                  |

Source: G.P. Rollo & Associates Ltd.

## 8.7 MEETING INDUSTRIAL DEMAND IN MAPLE RIDGE

If Maple Ridge will have demand for approximately 200 acres of industrial land by 2040 it must begin planning now for how it will meet that demand.

**It should be recognized that although Maple Ridge has large amounts of industrial land supply, much of it is located in the north which is not currently of interest to most industrial developers or users. The Abernethy Connector will improve absorption of industrial land in the North, but the location will still likely be too far away for many region serving businesses.**

The following table displays the vacant and underutilized industrial areas in Maple Ridge. The table also highlights alternative lands that could be considered for future industrial development.

**Table 30: Available Industrial Lands in Maple Ridge (acres)**

| <b>Available / Underutilized Industrial Lands in Maple Ridge</b> |                                   |                                       |  |
|--|-----------------------------------|---------------------------------------|--|
|  | <b>Available Industrial Lands</b> | <b>Underutilized Industrial Lands</b> | <b>Lands with Industrial Potential</b> |
| <b>Southwest</b>   | 6                                 |                                       | 40                                     |
| <b>Albion</b>  | 37                                | 47                                    |  |
| <b>North</b>   | 218                               | 72                                    |  |
| <b>Ruskin / Whonnock</b>   | 27                                | 5                                     |  |
| <b>Albion Flats</b>  |                                   |                                       | 50                                     |
| <b>232 St &amp; 128 Ave.</b>                                     |                                   |                                       | 55                                     |
| <b>Dept. of Transportation</b>                                   |                                   |                                       | 19                                     |
| <b>West of Kwantlan</b>  |                                   |                                       | 13                                     |
| <b>East of Kwantlan</b>  |                                   |                                       | 7                                      |
| <b>Total</b>   | <b>288</b>                        | <b>124</b>                            | <b>184</b>                             |
| <b>Total - No North or East</b>                                  | <b>43</b>                         | <b>47</b>                             | <b>184</b>                             |

Absorption in northern Maple Ridge will be slow, so the District must consider a range of scenarios if it is going to have marketable industrial lands available to meet demand.

- Without considering the north, Maple Ridge only has 90 acres of developable industrial land, mostly found in the Albion Industrial Area.
- The Albion Industrial Area itself has serious redevelopment constraints, including the floodplain (and associated dyke requirements), infrastructure and landowner expectations.
- Excluding the Albion Industrial Area and the North, Maple Ridge only has 6 acres of developable industrial land.
- Maple Ridge will need to provide another 100 acres of industrial lands to satisfy demand by 2040.

Given the approximate 200 acres of industrial land in Pitt Meadows that is currently or soon to be available, the District has an estimated 10 years before demand and development pressure will move to Maple Ridge. During this time Maple Ridge should plan to provide the needed lands.

### *8.7.1 Strategy #1: Status Quo*

With close to 225 acres of demand to 2040, the District has the option to try to meet demand within its current industrial lands.

- Future demand could potentially be satisfied by 46 acres of prime developable industrial lands in the southwest, and 100 acres in the Albion Industrial area.
- The remaining 50-70 acres of demand could be met by a combination of redevelopment in the southwest, and Albion Industrial area as well as development in the North.

The weakness of this scenario is the lack of prime industrial lands. Maple Ridge would likely have trouble recruiting businesses and would lose out on job growth without available lands in the southwest, or other well located developable industrial lands.

Another important issue will be the complications of redeveloping the Albion Industrial Park:

- Redevelopment of Albion Industrial Park will be slow and challenging given high costs of flood mitigation, infrastructure requirements, and high land values based on landowner expectations.
- Given these high costs, a higher density of development might be necessary, but will be delayed by determining how to pay for infrastructure costs in the area.
- The Albion Industrial Area is designated for Business Park use, and would not need an area plan to increase density for this use.

### *8.7.2 Strategy #2: Redevelopment of Albion Industrial Park*

The District could provide incentives for the redevelopment of Albion Industrial Park. Land uses in the Albion Industrial Park could be intensified to allow for greater employment densities, either through light industrial uses or potentially office uses.

Major redevelopment in the Albion Industrial Park will include significant infrastructure costs that will likely result in pressure to include a mix of uses in the area to increase land values.

Some of these infrastructure costs include:

- Improving the dyke, or raising the land. Estimates for a seismically upgraded dyke are in the \$50 million range. Rather than building

a new dyke, an estimated 3 metres of fill would be required to raise the land out of the floodplain.

- New industrial buildings are not required to build to the flood protection level and are only required to have working areas above the flood levels.
- Site contamination will be an issue, especially if the Albion Industrial Park is rezoned to increase employment density. If a mixed use employment / residential development is considered for the site, an Environmental Consultant should be commissioned to estimate the remediation costs involved.
- Additional employment density will increase pressure to create an improved interchange on the northwest side of the site. However the Ministry of Transportation will not allow a new traffic light at Tamarack Lane as it is too close to Kanaka Way under its current by-laws, and CP Rail will not allow another level crossing at 105<sup>th</sup> Avenue. Therefore an expensive overpass has been discussed at 105<sup>th</sup> Avenue, which will require some land expropriation.

The Albion Industrial Area is designated Business Park and is ready to allow rezoning. An extensive area planning process would not be required, and the road network is in place. A more strategic initiative would be to focus on incentives to drive desired action. It is believed that significant redevelopment in the Albion area could take over 10 years to materialize, but the District could speed up the process through consolidation incentives. The redevelopment of the Albion Industrial Park could be slowed given the reluctance of current owners to sell their lands.

If the District wants to consider rezoning the Albion Industrial Park to allow for increased employment density it should consider first confirming the costs involved; this would necessitate confirmation that a non-overpass solution is not feasible, estimates on the cost of an overpass, estimates on the cost of site remediation, and estimates on bringing the site out of the floodplain, either by raising the site or improving the dyke.

If these costs are prohibitive to redeveloping the site with a mix of uses, it is still likely that the Albion Industrial Park will see an increase of employment over time as industrial redevelopment occurs.

### *8.7.3 Strategy #3: Albion Flats*

The potentially developable lands on the Albion Flats south of 105<sup>th</sup> Avenue add up to approximately 85 acres. The Agricultural Land Commission was more receptive to lands south of 105<sup>th</sup> Avenue being excluded from the ALR than Albion Flats lands north of 105<sup>th</sup> Avenue. In conversations, the ALC reconfirmed their recommendation that the District of Maple Ridge put together an application for exclusion of the entire block of lands south of 105<sup>th</sup> Avenue.

It is likely that a mix of uses on the southern section of the Albion Flats would be proposed, but it is recommended that employment be a major component of any development of these lands.

Light industrial space and office space could coexist with retail commercial uses to create a vibrant hub within relative proximity to the Town Centre.

The ALC confirmed that applications were received regarding the potential exclusion of lands north of 105<sup>th</sup> Avenue. No timeline was given regarding these applications.

#### *8.7.4 Strategy #4: 232<sup>nd</sup> Street 128<sup>th</sup> Avenue*

There is approximately 50 – 60 acres of land designated for urban development southwest of the 232<sup>nd</sup> Street and 128<sup>th</sup> Avenue intersection. This location could include light industrial and office park development.

Given the proximity to residential, a new industrial zone allowing for low impact industrial development is recommended where the buildings have a similar style and massing to townhomes.

This site does not have the best location, but it is an improvement upon the northern industrial lands, and the lands in Ruskin or Whonnock.

#### *8.7.5 Strategy #5: Department of Transportation Lands*

The Department of Transportation owns 38 acres of land to the west of the eastern intersection of the Lougheed Highway and the Haney Bypass. These lands have a number of streams running through the site, and some slope issues. It is estimated that 50% of these lands could be developed for industrial use if redesignated. As it stands these properties are located within the Urban Area Boundary and currently zoned for CS-1, RM-1, and RS-3. An amendment to the Official Community Plan to support business park industrial development is recommended.

#### *8.7.6 Strategy #6: Lands Adjacent to Kwantlen First Nation*

There are lands to the west and east of the Kwantlen First Nations land along the Lougheed Highway that could potentially be redesignated if demand for new industrial land is outstripping supply in the future. Both sites to the east and west of the Kwantlen lands have slope issues. Based on a high level review of watercourses and slope on the site, it is estimated 13 acres to the west, and 7 acres to the east of the Kwantlen lands would be developable for industrial use. Currently these lands are outside the Urban Area Boundary and are designated RS-3. Metro Vancouver's regional growth strategy will be affected by any proposed redesignation of these lands. Given the site constraints, it is recommended that the feasibility of industrial development at these locations be investigated.

#### *8.7.7 Strategy #7: Redesignating Residential Lands*

If all of the above scenarios have been considered and demand for industrial land still exists, there could be potential within existing residentially designated neighbourhoods. Maple Ridge has significant lands designated for future residential supply, which should be considered for industrial usage if warranted by demand for employment lands. Maple Ridge needs to maintain a balance between the amount of industrial and residential lands, and over the long-term bringing new residential lands to market should be balanced with new industrial lands. As with 'Strategy 4' above, the creation of a low impact industrial zone is recommended to avoid conflicts with residential uses.

### *8.7.8 Strategy #8: ALR / ALR Exemptions*

Pursuing ALR exemptions for future land supply is considered a risk filled strategy that should only be pursued in the long term future if other initiatives prove insufficient for meeting demand for industrial land. The Agricultural Land Commission has changed the process of reviewing applications for ALR exemptions, and they are becoming stricter than in years past.

The ALC official that was interviewed gave the example that an application to exempt the Pelton Lands would have less chance of gaining approval than it did in 2010 when it was unanimously denied by the ALC board.

The applications to exempt lands north of 105<sup>th</sup> Avenue on the Albion Flats will give an indication of the potential for future ALR exemptions in Maple Ridge.

## 8.8 STRATEGIES FOR PROMOTING INDUSTRIAL LAND DEVELOPMENT

| General                               | Strategies  | Timing <sup>30</sup> |
|---------------------------------------|---|----------------------|
|                                       | Initiate dialogue within community planning projects (e.g. OCP review, Zoning Bylaw etc.) for how Maple Ridge can meet the projected demand for industrial space.   | Short-Term           |
|                                       | Allow greater flexibility for space utilization in industrial zones. This includes additional allowance for office space (as noted in Section 7), as well as restaurant facilities as accessory uses and/or at key locations (e.g. high profile intersections).   | Short-Term           |
|                                       | Consider potential for a new Industrial Zone to encompass potential light-industrial uses adjacent to residential areas.  | Short-Term           |
| Southwest                             | Strategies  |                      |
|                                       | The Southwest (e.g. Maple Meadows and environs) is the most attractive area for businesses in Maple Ridge.  |                      |
|                                       | While some mixing of uses is desirable in industrial parks to create vibrancy and provide needed/desired amenities, we recommend that major non-industrial uses such as big box retail stores not be permitted.   | Short-Term           |
|                                       | Do not permit large format retail (“big box”) on rezoned industrial lands south of Maple Meadows. While retail would certainly work well on this site, these lands are too valuable as future industrial supply. It is recommended that the M-3 zone is amended to exclude big box retail.  | Short-Term           |
|                                       | Increase flexibility for office uses within the M-3 zone.   | Short-Term           |
|                                       | Promote the redevelopment of aging buildings, including the ICBC site in Maple Meadows.   | Medium-Long Term     |
|                                       | New signage/wayfinding within the Maple Meadows business park could help attract new users.   | Short-Medium-Term    |
| Central Maple Ridge/Lougheed Corridor | Strategies  |                      |
| Zoning                                | <p>Many of the sites with industrial zoning in the Town Centre area are designated in the OCP for other uses. This should be reconsidered in areas where the industrial uses are fitting well within the surrounding community. Changing the zoning to CS-1 where some industrial uses are permitted should be considered.</p> <ul style="list-style-type: none"> <li>➤ The Lougheed corridor already has important employment density in Maple Ridge with many light industrial uses in CS-1 zones.</li> </ul> | Medium-Term          |

<sup>30</sup> “Short Term” = immediate to 2 years. “Medium Term” = 2-5 years. “Long Term” = 5+ years.



|                               |   |                  |
|-------------------------------|---|------------------|
| Zoning                        | The CS-1 zone should be relaxed to permit more light industrial, self-storage and office uses.  | Short-Term       |
|                               | Ultimately, development with retail and/or light industrial along with commercial on the ground floor and office above is an excellent mix/building typology for this corridor.   | Long-Term        |
| <b>Albion Industrial Area</b> | <b>Strategies</b>   |                  |
|                               | Development constraints such as floodplain issues, soil remediation, and the need for improved access will limit large scale redevelopment of this area for 10-15 years. Redevelopment will be a long-term undertaking, and will likely include a mix of uses to create a financially feasible project.   |                  |
|                               | Define costs for infrastructure upgrades, flood mitigation, soil remediation, access. <ul style="list-style-type: none"> <li>➤ Examine potential to pay for overpass through a DCC, through partnerships and/or through senior government infrastructure or economic development grant programs.</li> </ul>   | Medium-Long Term |
|                               | Future development should be based on a comprehensive District-wide plan for industrial lands   | Long-Term        |
|                               | Promote consolidation of land ownership, including District acquisition of sites that come to market.   | Long-Term        |
| <b>Albion Flats</b>           | <b>Strategies</b>   |                  |
|                               | Besides the 40 acres of land south of the Maple Meadows, the Albion Flats represents the 'best located' lands for future industrial uses.   |                  |
|                               | The Albion Flats are currently within the ALR. If proposals to have portions of the Albion Flats removed from the ALR are successful it should be considered for an employment hub.   | Long-Term        |
|                               | The Albion Flats has the potential to become a major employment hub. Planning for the Flats should include a mix of uses including light industrial, office park, recreational, and on-site-serving retail. Stakeholders felt that should this be achieved, the Albion Industrial Area would become more successful as it would benefit from increased amenities within walking distance. | Long-Term        |

| North             | Strategies   |                        |
|-------------------|--|------------------------|
|                   | Accelerate eastward extension of the Abernethy Connector   | Short-Medium Term      |
|                   | Promote area to companies, such as resource or institutional users, which do not rely on quick access to major transportation networks. <ul style="list-style-type: none"> <li>➤ Likely tenants in the north will be resource-based, institutional, and small owner-operated businesses.</li> </ul>                | Short-Term             |
|                   | Do not rely exclusively on industrial supply in the north to provide the land Maple Ridge requires to meet employment goals.   |                        |
| Whonnock & Ruskin | Strategies   |                        |
|                   | Whonnock should remain 'as-is' for existing uses, and potential relocation of some of the users/uses from the Albion Industrial Park over time. <ul style="list-style-type: none"> <li>➤ There is likely to be 'built-to-suit' development in this area, but no speculative development for many years.</li> </ul> | Long-Term              |
|                   | Promote waterfront uses for potential new businesses   | Short-Medium-Long Term |
|                   | Regard this areas as a future 'industrial reserve'   | Long-Term              |
|                   | Encourage the manufacturing sectors to locate here.  | Long-term              |

## **9.0 CONCLUDING REMARKS**

This report represents the completion of the 2<sup>nd</sup> phase of our work program with the District of Maple Ridge, having already completed the stakeholder workshops.

This study has determined that the employment forecast created by Metro Vancouver, of 48,000 jobs by 2041, is on the high end of the potential employment growth. A scenario with 42,500 jobs in Maple Ridge by 2041 is considered more likely and reduces demand for land.

However, even with the low employment forecast, Maple Ridge will be facing a shortage of industrial lands within 10 years. Planning for where future industrial development will be located needs to begin in the short to medium term.

GPRA has provided a series of both short term and long term recommendations that, if implemented, should position the District well for future commercial and industrial growth.

## APPENDIX A: Consolidated List of Recommendations

Following is a consolidated list of all recommendations made throughout this report. These recommendations are organized by timing – Short/Medium term and Long Term – and further divided by 3 sub-categories: (1) marketing & general employment, (2) retail & service commercial, and (3) office and industrial. Short term recommendations are things that council, planning and economic development can do starting today to improve the District’s industrial and commercial situation.

| Short/<br>Medium Term                     | Strategies   | Theme                         |
|---|--|-------------------------------|
| <b>Marketing &amp; General Employment</b> | Continue to support Economic Development office and their work to attract entrepreneurs, businesses and employees.   | Ec Dev                        |
|   | Focus on attracting businesses from sectors which either are not based on population growth, or where jobs in Maple Ridge are below regional averages. These sectors include Manufacturing, Business Services, FIRE, Education, and Tourism. | Employment                    |
|   | Extend Town Centre Incentive plan which is set to expire at the end of 2013.   | Employment                    |
|   | Continue to support new cultural events in the Town Centre   | Culture                       |
|   | Promote food carts in the Town Centre to animate Memorial Peace Park and other public spaces.  | Culture                       |
|   | Promote hotel development in the Town Centre, with meeting facilities.   | Tourism                       |
|   | Promote executive business centre in the Town Centre   | Employment                    |
|   | Expand the permitted uses for home-based businesses. Promote Maple Ridge as home-based business friendly, building on past success.  | Employment                    |
|   | Work to attract tournaments and events to Maple Ridge  | Ec Dev                        |
|   | Use employment by sector figures prepared by GPRA for this report as a baseline against which to track future successes in employment growth.  | Tracking                      |
|   | Examine feasibility for creating additional wireless hot spots in the Town Centre.   | Information Services / Ec Dev |
|   | Promote development/expansion of educational facilities including: <ul style="list-style-type: none"> <li>• Business innovation accelerator</li> <li>• Working farm school</li> <li>• Marine technologies Centre</li> </ul>                  | Employment                    |

|                                  |   |                                   |
|----------------------------------|---|-----------------------------------|
| <b>Retail/Service Commercial</b> | Investigate CS-1 and C-2 zones as they pertain to desirable types of commercial development along the Lougheed Highway.   | Zoning                            |
|                                  | We recommend that areas currently designated for industrial <b>not</b> be re-designated or rezoned for large format retail. We recommend that large format retail be removed as a permitted use in zone M-3.  | Zoning                            |
|                                  | The CS-1 zone should be modified to permit more light industrial, self-storage and office uses.   | Zoning                            |
|                                  | Retain all designated commercial space within Silver Valley.  | Designation                       |
|                                  | Remove differentiation between neighbourhood and tourist commercial in Silver Valley.   | Designation                       |
|                                  | Promote the downtown and available land supply, both vacant and underutilized.  | Incentives                        |
|                                  | Work with merchants and land owners to improve building facades and displays.   | Engagement /incentives            |
|                                  | Work with landowners of underutilized sites to either redevelop those sites or to sell lands to speed up redevelopment.   | Engagement                        |
|                                  | Mandate building to a common frontage line with some provision for variance for restaurants to allow patio seating where appropriate or desired for street animation.   | Zoning / Design                   |
|                                  | Require that a minimum of 60% of first floor building façade surface area of commercial structures be covered in clear glass (excluding doorways).  | Design                            |
|                                  | Do not permit drive-through businesses in the Town Centre.  | Zoning                            |
|                                  | Consider a beautification grant matching program for small projects covering such items as planters, hanging baskets, boulevard landscaping etc. available to landlords and interested tenants.   | Incentives                        |
|                                  | Consider changing the requirement for ground floor commercial along Dewdney Trunk Road east of 227th Street (as shown in Schedule G of the Zoning Bylaw) to either mandatory “ground floor active use” or optional ground floor commercial (i.e. flexible mixed-use). Active use could include office, gallery, indoor recreation, daycare, institutional space or other publicly accessible space. Removing strict commercial requirements may help to better concentrate the commercial demand in a well-defined ‘core precinct.’ | Zoning & Designation              |
|                                  | A similar change to Schedule G should be considered for the area of Dewdney west of 222nd Street  | Zoning                            |
|                                  | Encourage better pedestrian connectivity between the civic precinct and Haney Place Mall  | Design                            |
|                                  | Animate the public space around Memorial Peace Park. The District should encourage restaurant space to be developed at 224th and McIntosh Avenue, and directly across from the pagoda on the north side of Haney Place Crescent. Food carts are another good active use that could locate around the park.  | Promotion/ Incentives/ Engagement |
|                                  | Emphasize and encourage land assembly of the blocks on the east side of 226th Street for mixed-use development.   | Engagement                        |

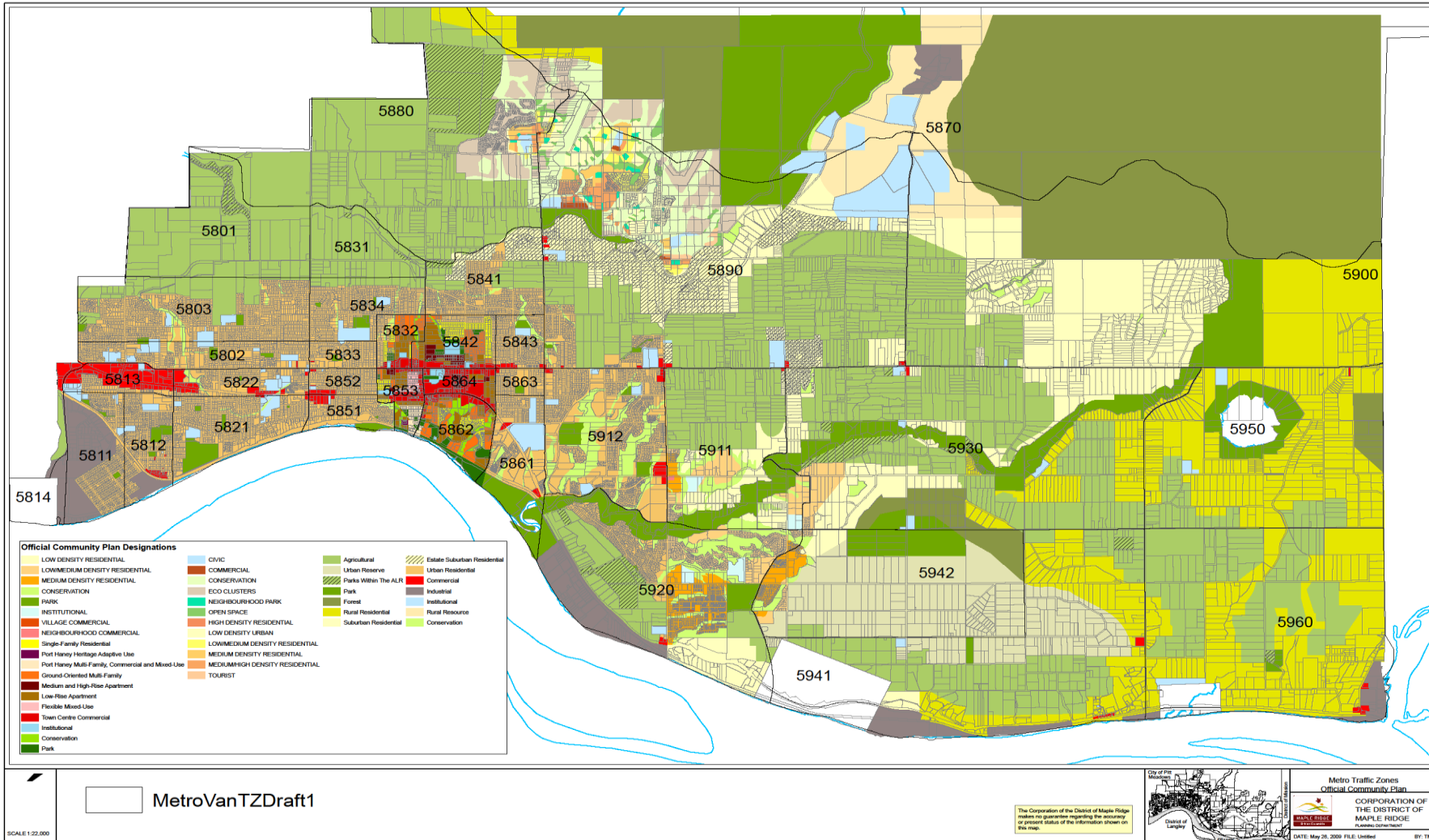
|   |   |                     |
|---|---|---------------------|
|   | Design guidelines emphasizing street-wall retail, parking at rear and high-quality storefronts should be applied to future Village or Community commercial centres. The quality of design at the Village node in the Albion Neighbourhood serves as a guide.  | Design              |
| <b>Industrial &amp; Office</b>            | Consider the following to improve industrial land supply in the near-term: <ol style="list-style-type: none"> <li>1. Approve rezoning application for <b>40 acre</b> site at 11055 Hazelwood Street.</li> <li>2. Examine potential for redesignation of <b>50-60 acre</b> site at 232<sup>nd</sup> Street and 128<sup>th</sup> Avenue for industrial.</li> <li>3. Move forward with Abernethy connector extension to improve marketability of Northern industrial lands.</li> <li>4. Plan for future industrial at Albion Flats.</li> </ol> | Zoning, Designation |
|   | To better accommodate demand for office space within business park environments, it is recommended that the District modify the M-3 zoning bylaw restriction stipulating that accessory office use “not exceed 25% of the gross floor area of the principal use” to instead permit office as a “principal use.”   | Zoning              |
|   | Permit greater flexibility in industrial zones to allow for restaurant and accessory uses at key locations (e.g. high profile intersections.)   | Zoning              |
|   | Consider potential for a new Industrial Zone to encompass potential light-industrial uses adjacent to residential areas.  | Zoning              |
|   | Promote northern industrial areas (e.g. Kanaka Business Park) to companies/sectors that do not rely on quick access to major transportation networks or full servicing, but which would benefit from highland locations not at risk of flooding. Likely tenant categories will be resource industries, institutional users, small owner-operated businesses serving the local market, and data centres that require secure, remote locations.   | Ec Dev              |
|   | The Town Centre Commercial zone (C-3) permits various types of office-related uses (e.g. business services, professional services, financial services), and the Town Centre Area Plan encourages office in mixed-use development within the “Central Business District.”<br><br>To encourage office development in mixed-use environments within the CBD, a bonus density provision should be explored whereby residential density bonuses are used to encourage additional employment generating space.                                    | Zoning / Policy     |
|   | New signage/wayfinding within the Maple Meadows business park could help attract new users.   | Signage             |
| <b>Long-Term</b>                          | <b>Strategies</b>   | <b>Theme</b>        |
| <b>Marketing &amp; General Employment</b> | Pursue potential for West Coast Express station at Albion.  | Transportation      |

|  |   |                                      |
|--|---|--------------------------------------|
|  | Utilize Fraser River and Albion Ferry site for tourist activities, including a tourist visitor centre   | Tourism                              |
|  | Work with landowners of underutilized sites in the Town Centre and elsewhere to either redevelop those sites or to sell lands to speed up redevelopment.  | Engagement & Incentives              |
| <b>Retail &amp; Service Commercial</b> | Encourage redevelopment of Haney Plaza to mixed residential/commercial, and work with the proponent of the mixed-use development at 224th and Dewdney (NW corner) to ensure that project moves forward as the market matures.   | Engagement & Incentives              |
|  | Monitor whether economic incentives are appropriate or require modification through periodic 'check ins' with key stakeholders  | Monitoring                           |
|  | Encourage redevelopment of the Haney Place Mall. Such redevelopment will be a complex, multi-year undertaking involving partnership between mall owners, anchor tenants and the District. There should be exploration of appropriate incentives and assistance to encourage redevelopment. Redevelopment of the mall would likely allow for significantly more on-site retail space, as well as office uses and possibly residential. | Engagement & Incentives              |
|  | Encourage densification and 'urbanization' of retail plazas over time, as demand allows.  | Engagement & Incentives              |
|  | Improve multi-modal connectivity between commercial developments along Dewdney Trunk Road and Lougheed Highway, and the surrounding residential areas. This could require municipal property acquisition and easements.   | Design & Acquisitions                |
|  | Encourage new retail in West Maple Ridge to be developed close to the street, at first through pad development at key site entry/exit points and high visibility corners.   | Zoning & Design                      |
| <b>Industrial</b>                      | Incentivize long-term redevelopment and/or intensification of employment at Albion Industrial Park. Review costs involved in such redevelopment/intensification, including: <ul style="list-style-type: none"> <li>• Dyke system;</li> <li>• Contamination remediation</li> <li>• Overpass</li> <li>• Transportation</li> </ul>   | Incentives & Research                |
|  | Future development at Albion Industrial area should be based on a comprehensive District-wide plan for industrial lands.  | Planning                             |
|  | Promote consolidation of land ownership in Albion Industrial area, including District acquisition of sites that come to market.   | Engagement, Incentives, Acquisitions |
|  | Consider <b>38 acre</b> Department of Transportation Lands to the west of the eastern intersection of Lougheed Highway and Haney Bypass for long-term industrial supply.  | Designation                          |
|  | Consider the estimated <b>13 acres</b> to the west and <b>7 acres</b> to the east of Kwantlen lands for long-term industrial supply.  | Designation                          |
|  | If all other options have been explored thoroughly and demand warrants additional industrial, examine potential for re-designating  | Designation                          |

|  |  |                |
|--|--|----------------|
|  | some of the non-developed long term residential land supply for industrial uses.   |                |
|  | Develop Albion Flats south of 105 <sup>th</sup> as a major employment hub. Plan in conjunction with redevelopment/intensification of Albion Industrial Park.                                     | Planning & ALR |
|  | Whonnock and Ruskin should remain as-is for existing uses, with long-term potential for relocation of some uses from Albion Industrial park. Regard these areas as long-term industrial reserve. | Planning       |



# APPENDIX B: Land Use Map with Traffic Zones



### **West Maple Ridge**

- Demarcated by Pitt Meadows border in the west, approximate Town Centre boundary in the east (extending to 224<sup>th</sup> street north of Town Centre), Fraser River in the South, and south of 128<sup>th</sup> Avenue in the North.
- Corresponds with Metro Vancouver Traffic Zones 5803, 5802, 5822, 5821, 5812, 5811, 5814, 5834, 5833, 5852, 5851.

#### **1. Town Centre**

- Demarcated by the approximate town centre boundaries identified in the Town Centre Area Plan (Bylaw 6610-2008), slightly adjusted to Metro Vancouver Traffic Zone boundaries for data aggregation purposes;
- Corresponds with Metro Vancouver Traffic Zones 5832, 5842, 5843, 5853, 5864, 5863, 5862, 5861.

#### **2. Cottonwood/East Haney**

- Demarcated by boundary with Town Centre to the west, Fraser River to the south, boundary with “North/Silver Valley” in the north and boundary with “East Maple Ridge” in the east;
- Corresponds with Metro Vancouver Traffic Zones 5912 and 5920;

#### **3. North / Silver Valley**

- Demarcated by border with Mission in the east, border with Pitt Meadows in the west, extent of inhabited area in the north, and boundaries with “West”, “Town Centre”, “Cottonwood/East Haney,” and “East” to the south.
- Corresponds with Traffic Zones 5801, 5831, 5841, 5880, 5890, 5870, 5900.

#### **4. East Maple Ridge**

- Demarcated by border with Mission in the east, boundary with North/Silver Valley area in the north, boundary with Cottonwood/East Haney in the west, and Fraser River in the south.
- Corresponds with Traffic Zones 5911, 5930, 5950, 5960, 5942, 5941.