INVENTORY OF VACANT INDUSTRIAL AND BUSINESS PARK LANDS, 2010-11 UPDATE

HIGHLIGHTS

The total city-wide supply of vacant industrial and business park land stood at 2,185.5 net hectares as of the end of December 2011. This is a decrease of 185 net hectares since last reported for the end of 2009.

Approximately 56% (1,220.9 net ha) of the vacant land supply was located in the urban area, split between 329.9 net ha inside the Greenbelt and 891 net ha outside the Greenbelt. A total of 964.6 net ha of vacant land were provided in the rural area.

During 2010 and 2011, a total 106.8 ha of industrial land were developed comprised of 61.8 ha in 2010 and 45 ha in 2011 (Table 4). This figure drops to 92.9 ha when land developed for non-industrial uses is excluded (Table 5).

Over eighty percent (83.8%) of the land in business parks inside the Greenbelt had been developed as of the end of 2011. Of the 329.9 net ha that remain, 66% (219.1 ha) are in public ownership, primarily by the federal government (mostly the Airport Authority) and the City of Ottawa.

Using running average rates of consumption over the last 27 years, the city had an estimated 29 year supply of urban employment land at the end of 2011. The rural area has an even larger supply; at historic development rates there are over 86 years of rural supply.

Applying the methodology of the Employment Lands Study, 2012 Update, the urban land supply at the end of 2011 was sufficient for 36 years, and the rural supply for 100 years.

PURPOSE AND COVERAGE

This survey reports on the inventory of vacant industrial and business park land in the urban and rural areas of the city of Ottawa as of the end of 2011. For brevity the balance of the report refers to these lands as “industrial”.

Land covered by the survey in the urban area is designated Employment Area or Enterprise Area in the Official Plan and also includes smaller parcels outside of these areas, usually designated General Urban Area, which are zoned for industrial use. All rural industrial areas are identified by their zoning and have no specific designation in the Official Plan, other than the Carp Road Corridor Rural Employment Area and in the secondary plan for the village of Richmond.

There are minor changes and updates to industrial area boundaries and the vacant properties inside them due to modifications to better define the extent of the areas. Other small changes have also occurred due to updated POLARIS property fabric. As a result of these changes, detailed comparisons between this report and earlier surveys may not be possible.

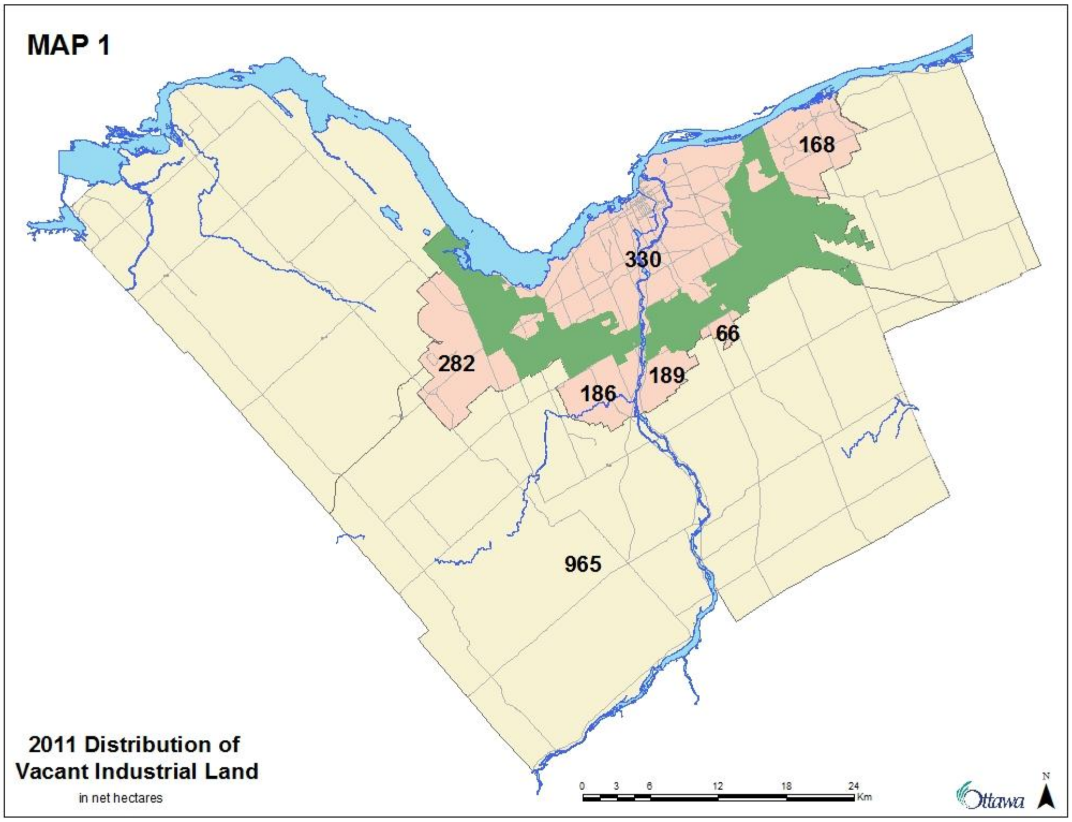
Parcels identified in this report as vacant include lots (or part lots) that do not have permanent structures on them, but may include lands that are temporarily used for outdoor storage. Vacant lots may not be available for development at the present time depending on servicing and landowner intentions.

In most instances, land parcels based on ownership form the basic unit of observation. Parcels may be further subdivided based on variations in zoning or other factors. For technical information on the parcel mapping, refer to the Appendix.

This edition is the newest in a series of similar monitoring reports prepared by the City and (prior to 2001) the former Region of Ottawa-Carleton since 1984. The survey is updated every two years.

LAND SUPPLY

There was a total of 2,185.5 net hectares (2,488.8 gross ha) of vacant industrial land across the city at the end of 2011. The distribution of these lands by major geographic area is illustrated on Map 1. A detailed list by area is provided in Table 2.



The urban area had 1,220.9 net ha of vacant industrial land, split between areas inside the Greenbelt, with 329.9 net ha, and 891 net ha in the urban centres outside the Greenbelt. The rural part of Ottawa had 964.6 net ha. (Table 2)

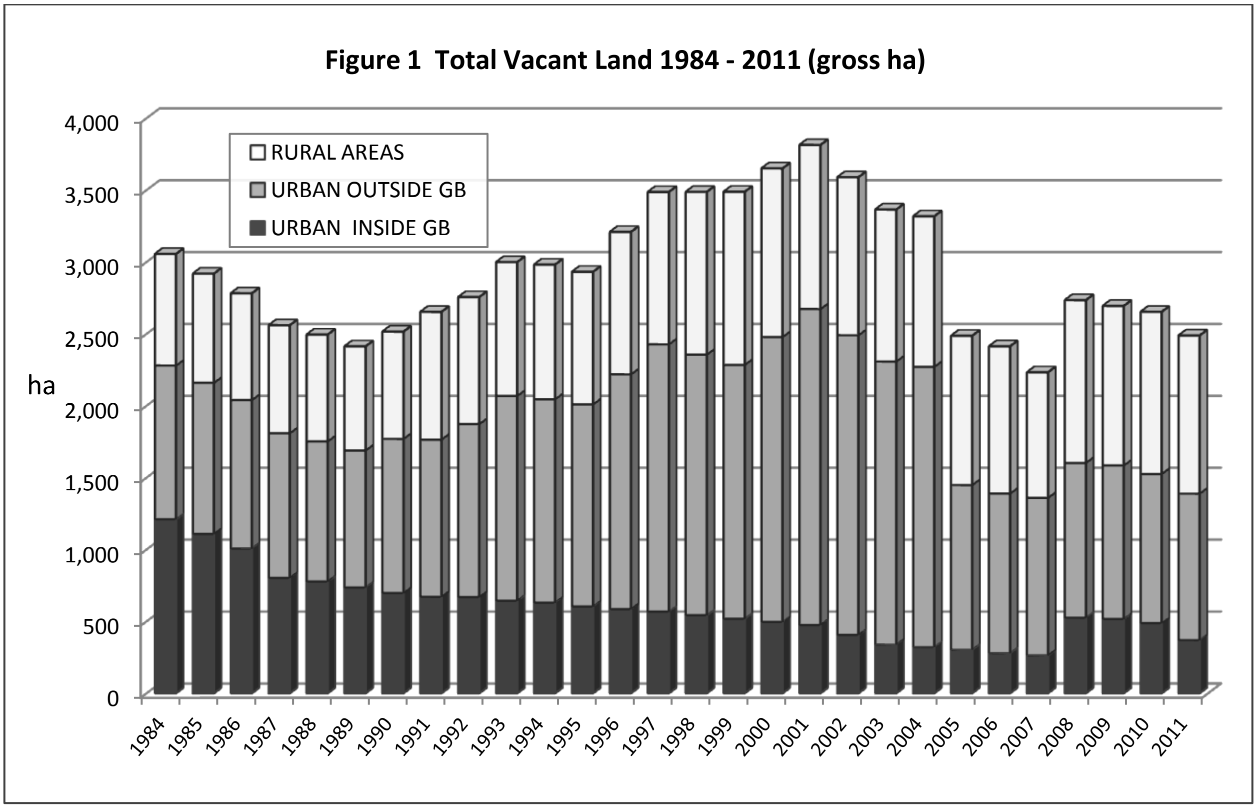
Overall, the city-wide supply of vacant industrial land is down by approximately 185.5 net ha from 2009. Changes to the total land supply are the product of revisions to industrial park boundaries, lands that were developed, new lands designated or zoned as industrial, or existing industrial lands that were designated or re-zoned to another use. A total of 94.3 ha were developed for industrial and other employment uses including development on expansion lots. The remaining 91.2 ha represents a net loss of vacant industrial land to other uses mainly through lot line adjustments and zoning changes. For a detailed review of these changes (at both industrial area and vacant parcel levels) refer to Table 1A in the Appendix.

Table 1. Industrial Lands - Changes Between 2009 and 2011 (gross ha) (developed and undeveloped land)

Map Ref	Industrial Area	Total 2009 ha	Total 2011 ha	Change 2009-2011	Comment
	URBAN				
	Inside Greenbelt West of Rideau River				
8	Bells Corners Employment Area	103.4	103.4	0.0	no change
10	Queensview-Morrison Office Park	32.0	32.0	0.0	no change
11	Woodward Business Park	52.4	52.4	0.0	no change
12	Colonnade Business Park	99.5	99.5	0.0	no change
13	Merivale Industrial Area	159.3	159.3	0.0	no change
14	Rideau Heights Business Park	101.9	101.9	0.0	no change
	Sub-Total West of Rideau River	***548.5***	***548.5***	***0.0***	
	Inside Greenbelt East of Rideau River				
18	Rideau North Industrial District	16.0	16.0	0.0	no change
19	Riverside-Uplands	22.4	22.4	0.0	no change
20	Hunt Club North Field Aviation Area	71.3	71.3	0.0	no change
21	Limebank North Business Area	65.9	69.7	3.8	updated airport plans
22	Airport South Area	54.8	54.8	0.0	no change
23	Airport - Lester Sector	61.6	61.6	0.0	no change
24	Airport Gateway Business Park	72.9	72.9	0.0	no change
25	South Walkley-Albion Industrial Area	149.5	149.5	0.0	no change
26	Ottawa South Business Park	162.4	162.4	0.0	no change
27	Hawthorne-Stevenage Industrial Area	315.7	313.4	-2.3	new interchange along Hunt Club overpass
28	Sheffield Industrial Area	228.5	228.0	-0.6	property line adjustments
29	Newmarket-Cyrville Industrial Area	200.6	200.6	0.0	no change
30	Industrial Avenue Business Park	110.6	110.6	0.0	no change
31	Coventry Industrial Area	29.0	22.8	-6.2	modification from zoning change
32	Vanier Parkway	15.0	15.0	0.0	no change
33	National Research Council	159.5	159.5	0.0	no change
34	Canotek Business Park	49.9	49.9	0.0	no change
	Sub-Total East of Rideau River	***1,785.6***	***1,780.4***	***-5.3***	
	Total Inside Greenbelt	**2,334.1**	**2,328.8**	**-5.3**	
	Urban Centres Outside of Greenbelt				
1	Kanata West Business Park	165.9	165.9	0.0	no change
3	Kanata South Business Park	102.1	102.1	0.0	no change
4	Terry Fox Business Park	72.0	72.0	0.0	no change
5	Hazeldean Industrial Area	16.0	16.0	0.0	no change
6	Kanata Town Centre Industrial Area	10.8	10.8	0.0	no change
7	Kanata North Business Park	479.3	479.3	0.0	no change
	Sub-Total Kanata	***846.1***	***846.1***	***0.0***	
2	Stittsiville Business Park	47.4	47.4	0.0	no change
	Sub-Total Stittsville	***47.4***	***47.4***	***0.0***	
9	416 Business Park	184.3	180.5	-3.8	modification from zoning change
15	South Merivale Business Park	99.8	99.8	0.0	no change
	Sub-Total South Nepean	***284.1***	***280.3***	***-3.8***	
16	Riverside South Business Park	231.4	223.1	-8.3	revisions to CDP boundary
	Sub-Total Riverside South	***231.4***	***223.1***	***-8.3***	
17	Albion-Leitrim Industrial Area	142.0	153.9	11.9	changes to reflect existing zoning
	Sub-Total Leitrim	***142.0***	***153.9***	***11.9***	
35	Youville Business Park	41.2	41.2	0.0	no change
36	Ottawa River Business Park	31.6	31.6	0.0	no change
37	Taylor Creek Business Park	33.9	34.0	0.0	property line adjustments
38	Cardinal Creek Business Park	24.6	24.6	0.0	no change
39	South Orleans Industrial Park	194.9	194.8	0.0	property line adjustments
	Sub-Total Orléans	***326.2***	***326.2***	***0.0***	
	Total Urban Centres	**1,877.2**	**1,877.0**	**-0.2**	
	TOTAL URBAN	**4,211.3**	**4,205.8**	**-5.5**	
	RURAL				
	Rural West				
101	A.G Reed Industrial Area	151.9	159.0	7.1	land added on east side of Carp Rd
102	Carp Road Corridor Rural Employment Area	685.7	663.9	-21.8	modifications to align with current zoning
103	Carp Airport Industrial Area	261.2	261.3	0.0	property line adjustments
104	Ashton Industrial Area	39.7	39.7	0.0	no change
105	Westwood Industrial Area	50.3	50.3	0.0	no change
106	Richmond Industrial Area	84.1	84.7	0.5	changes in secondary plans and zoning
107	Moodie Drive Industrial Area	78.6	78.6	0.0	no change
108	Jordel Agri-Industrial Commercial Park	50.6	50.6	0.0	no change
	Sub-Total Rural West of Rideau R.	***1,402.3***	***1,388.2***	***-14.1***	
	Rural East				
109	South Gloucester Industrial Area	189.0	189.0	0.0	no change
110	Gordon McKeown Industrial Area	38.9	38.9	0.0	no change
111	Highway 31-South Greely Industrial Area	162.7	162.7	0.0	no change
112	IndCum Industrial Area	116.6	116.5	-0.1	property line adjustments
113	Vars Business Park	140.5	140.5	0.0	no change
114	Vars Cement	69.8	69.8	0.0	no change
	Sub-Total Rural East of Rideau R.	***717.5***	***717.4***	***-0.1***	
	TOTAL RURAL	**2,119.8**	**2,105.7**	**-14.2**	
	TOTAL OTTAWA	**6,331.1**	**6,311.5**	**-19.7**	

Table 2. Industrial Land Inventory 2011

Map Ref	Industrial Area	Total Industrial Area (gross ha)	Built Land (gross ha)	Vacant Land (gross ha) Parcels	Expansion	ROW	Percent Built	Developed net ha '10-'11	Vacant Land (net ha)
	URBAN								
	Inside Greenbelt West of Rideau River								
8	Bells Corners Employment Area	103.4	94.5	8.8	0.1	0.0	91.4	0.0	7.7
10	Queensview-Morrison Office Park	32.0	31.5	0.5	0.0	0.0	98.5	0.9	0.5
11	Woodward Business Park	52.4	52.4	0.0	0.0	0.0	100.0	0.0	0.0
12	Colonnade Business Park	99.5	86.0	12.9	0.6	0.0	86.4	0.0	11.8
13	Merivale Industrial Area	159.3	149.6	9.7	0.0	0.0	93.9	2.6	9.7
14	Rideau Heights Business Park	101.9	97.5	4.5	0.0	0.0	95.6	0.9	4.5
	Sub-Total West of Rideau River	***548.5***	***511.4***	***36.3***	***0.8***	***0.0***	***93.2***	***4.4***	***34.1***
	Inside Greenbelt East of Rideau River								
18	Rideau North Industrial District	16.0	14.9	1.1	0.0	0.0	93.1	0.0	1.1
19	Riverside-Uplands	22.4	5.7	16.7	0.0	0.0	25.4	0.0	15.3
20	Hunt Club North Field Aviation Area	71.3	57.9	13.4	0.0	0.0	81.1	2.0	11.5
21	Limebank North Business Area	69.7	23.3	46.4	0.0	0.0	33.5	0.0	39.4
22	Airport South Area	54.8	1.4	53.4	0.0	0.0	2.5	0.0	45.7
23	Airport - Lester Sector	61.6	55.0	6.6	0.0	0.0	89.3	0.0	6.6
24	Airport Gateway Business Park	72.9	39.2	33.7	0.0	0.0	53.7	13.4	28.7
25	South Walkley-Albion Industrial Area	149.5	126.7	22.8	0.0	0.0	84.7	0.0	20.3
26	Ottawa South Business Park	162.4	153.4	7.0	2.0	0.0	94.5	0.0	7.0
27	Hawthorne-Stevenage Industrial Area	313.4	231.4	82.0	0.0	0.0	73.8	2.9	74.1
28	Sheffield Industrial Area	228.0	221.3	3.3	3.4	0.0	97.1	0.5	3.3
29	Newmarket-Cyrville Industrial Area	200.6	193.2	7.5	0.0	0.0	96.3	0.6	7.5
30	Industrial Avenue Business Park	110.6	98.6	12.0	0.0	0.0	89.2	0.0	10.2
31	Coventry Industrial Area	22.8	22.8	0.0	0.0	0.0	100.0	0.0	0.0
32	Vanier Parkway	15.0	15.0	0.0	0.0	0.0	100.0	0.0	0.0
33	National Research Council	159.5	139.2	20.3	0.0	0.0	87.3	19.1	17.3
34	Canotek Business Park	49.9	40.9	7.9	0.6	0.4	82.1	0.0	7.9
	Sub-Total East of Rideau River	***1,780.4***	***1,439.8***	***334.2***	***6.0***	***0.4***	***80.9***	***38.6***	***295.9***
	Total Inside Greenbelt	**2,328.8**	**1,951.2**	**370.5**	**6.7**	**0.4**	**83.8**	**43.0**	**329.9**
	Urban Centres Outside of Greenbelt								
1	Kanata West Business Park	165.9	19.5	146.4	0.0	0.0	11.8	0.0	124.7
3	Kanata South Business Park	102.1	50.7	50.4	0.0	1.0	49.7	1.2	47.3
4	Terry Fox Business Park	72.0	54.8	17.1	0.0	0.0	76.2	0.0	15.9
5	Hazeldean Industrial Area	16.0	15.4	0.6	0.0	0.0	96.0	0.0	0.6
6	Kanata Town Centre Industrial Area	10.8	8.7	2.0	0.0	0.0	81.2	0.0	2.0
7	Kanata North Business Park	479.3	383.6	91.5	2.7	1.5	80.0	3.7	86.6
	Sub-Total Kanata	***846.1***	***532.8***	***308.1***	***2.7***	***2.5***	***63.0***	***4.9***	***277.2***
2	Stittsville Business Park	47.4	42.6	4.8	0.0	0.0	89.9	1.3	4.8
	Sub-Total Stittsville	***47.4***	***42.6***	***4.8***	***0.0***	***0.0***	***89.9***	***1.3***	***4.8***
9	416 Business Park	180.5	26.0	154.5	0.0	0.0	14.4	0.0	132.6
15	South Merivale Business Park	99.8	37.5	60.2	0.0	2.1	37.5	0.0	53.0
	Sub-Total South Nepean	***280.3***	***63.5***	***214.7***	***0.0***	***2.1***	***22.7***	***0.0***	***185.6***
16	Riverside South Business Park	223.1	0.0	221.8	0.0	1.2	0.0	0.0	189.2
	Sub-Total Riverside South	***223.1***	***0.0***	***221.8***	***0.0***	***1.2***	***0.0***	***0.0***	***189.2***
17	Albion-Leitrim Industrial Area	153.9	77.1	76.8	0.0	0.0	50.1	0.7	66.4
	Sub-Total Leitrim	***153.9***	***77.1***	***76.8***	***0.0***	***0.0***	***50.1***	***0.7***	***66.4***
35	Youville Business Park	41.2	40.6	0.5	0.0	0.0	98.7	1.0	0.5
36	Ottawa River Business Park	31.6	6.0	23.6	0.0	2.0	19.0	0.0	20.4
37	Taylor Creek Business Park	34.0	26.8	7.2	0.0	0.0	78.8	2.1	7.2
38	Cardinal Creek Business Park	24.6	11.9	12.3	0.0	0.4	48.4	0.0	12.3
39	South Orleans Industrial Park	194.8	46.5	148.4	0.0	0.0	23.8	1.2	127.5
	Sub-Total Orléans	***326.2***	***131.7***	***192.1***	***0.0***	***2.4***	***40.4***	***4.3***	***167.9***
	Total Urban Centres	**1,877.0**	**847.8**	**1,018.3**	**2.7**	**8.2**	**45.2**	**11.3**	**891.0**
	TOTAL URBAN	**4,205.8**	**2,799.0**	**1,388.8**	**9.5**	**8.6**	**66.5**	**54.2**	**1,220.9**
	RURAL								
	Rural West								
101	A.G Reed Industrial Area	159.0	77.1	81.7	0.0	0.3	48.5	11.8	72.1
102	Carp Road Corridor Rural Employment Area	663.9	316.5	331.3	16.0	0.2	47.7	6.0	293.4
103	Carp Airport Industrial Area	261.3	156.3	103.8	0.0	1.2	59.8	0.0	88.2
104	Ashton Industrial Area	39.7	13.2	26.5	0.0	0.0	33.2	0.0	23.0
105	Westwood Industrial Area	50.3	14.0	36.4	0.0	0.0	27.8	0.7	30.9
106	Richmond Industrial Area	84.7	16.8	67.9	0.0	0.0	19.8	0.0	58.1
107	Moodie Drive Industrial Area	78.6	69.4	8.2	0.9	0.0	88.3	0.0	7.0
108	Jordel Agri-Industrial Commercial Park	50.6	0.8	45.7	0.0	4.2	1.6	0.0	42.2
	Sub-Total Rural West of Rideau R.	***1,388.2***	***664.0***	***701.5***	***16.9***	***5.8***	***47.8***	***18.4***	***614.8***
	Rrural East								
109	South Gloucester Industrial Area	189.0	104.6	83.9	0.0	0.5	55.3	3.2	73.6
110	Gordon McKeown Industrial Area	38.9	27.4	11.5	0.0	0.0	70.4	1.6	11.5
111	Highway 31-South Greely Industrial Area	162.7	58.5	104.2	0.0	0.0	36.0	3.5	90.9
112	IndCum Industrial Area	116.5	34.7	78.9	0.0	2.9	29.8	8.2	70.5
113	Vars Business Park	140.5	68.5	72.0	0.0	0.0	48.8	0.0	62.4
114	Vars Cement	69.8	21.9	48.0	0.0	0.0	31.3	5.2	40.8
	Sub-Total Rural East of Rideau R.	***717.4***	***315.6***	***398.5***	***0.0***	***3.4***	***44.0***	***21.7***	***349.7***
	TOTAL RURAL	**2,105.7**	**979.6**	**1,100.0**	**16.9**	**9.2**	**46.5**	**40.1**	**964.6**
	TOTAL OTTAWA	**6,311.5**	**3,778.5**	**2,488.8**	**26.4**	**17.7**	**59.9**	**94.3**	**2,185.5**



Inside Greenbelt Supply

At the end of 2011, 83.8% of industrial land inside the Greenbelt was already developed. The remaining supply of 329.9 net ha is concentrated in the city's east end with 90% of this total. The industrial areas around the Ottawa Macdonald-Cartier International Airport account for 147.2 net ha, about 45% of vacant land inside the Greenbelt. The remaining supply in the east is located primarily in the traditional industrial areas of South-Walkley-Albion and Hawthorne-Stevenage and the Industrial Avenue Business Park, as well as land in the National Research Council / CSIS employment area. (Table 2)

The supply of vacant industrial land west of the Rideau River totals only 34.1 net ha. Vacant lands are concentrated in the Colonnade, Merivale and Rideau Heights industrial areas as well as the former Steenbakers site in Bells Corners. Once these sites are developed future construction in any of the west-end business parks will be through redevelopment or expansions on existing properties.

Urban Outside Greenbelt Supply

Vacant industrial land in urban areas outside the Greenbelt represents 891 net ha or about 73% of the total urban supply. The distribution of industrial land is located in three primary areas, West (Kanata-Stittsville 282 net ha), South (South Nepean 185.6 ha, Riverside South 189.2 ha and Leitrim 66.4 ha) and East (Orléans 167.9 ha). Among the urban centres, the splits are; 32% in Kanata-Stittsville, 21% each in South Nepean and Riverside South, 19% in Orléans, and 7% in Leitrim.

All industrial areas outside the Greenbelt have some vacant land, but the Hazeldean, Kanata Town Centre and Youville areas are approaching build-out. In contrast, the majority of land in the Kanata West, 416, Riverside South, Leitrim and South Orléans industrial areas has not been subdivided or serviced and accounts for a total of about 640 net ha.

Rural Supply

After discounting the absorption of newly developed rural industrial lands (10.2 ha), the rural area has a total of 964.6 net ha. This was 8.9 net ha less than was reported at the end of 2009. Lands formerly covered by smaller individual industrial parks along Carp Road have been consolidated and form a single employment area that conforms to the zoning by-law.

At the end of 2011, 614.8 net ha (64%) of vacant rural industrial land were located west of the Rideau River, concentrated along Carp Road. East of the Rideau, 349.7 net ha of vacant industrial space were clustered along Highway 417 east and Bank Street south (old Highway 31) (Table 3). These lands serve uses that do not require large amounts of water and typically cater to land extensive uses such as storage, warehousing, construction and transportation, as well as industrial uses associated with quarrying.

Ontario

Ownership of Vacant Industrial Land

Table 3 summarizes Ottawa's vacant industrial land supply by ownership. Overall, three-quarters (1,815.5 net ha) of all vacant land is owned by private owners. The vast majority of privately owned vacant industrial land is found outside the Greenbelt, with a total of 758 net ha in suburban areas and 946.7 net ha in the rural area. The remaining quarter or 450.8 ha is owned by public agencies; the Federal Government owns the largest share with 260.9 net ha (70%), the City of Ottawa accounts for 95.7 net ha (26%) and the remaining 18 net ha are owned by the province.

The majority (95.6%) of publicly-owned land representing 357.7 net ha is located in the urban area and is concentrated inside the Greenbelt in areas east of the Rideau River. While only 1.7% of the total vacant industrial supply in the rural area is publically owned, 90% of it (14.6 net ha) is owned by the City.

Table 3. Vacant Land in Private and Public Ownership, 2011

Map		Vacant Land	Private Ownership		Public Ownership				
Ref.	Industrial Area	2011 net ha	Total Ha	% share	Federal [1]	Provincial	Municipal	Total Ha	% share
	URBAN								
	Inside Greenbelt West of Rideau River								
8	Bells Corners Employment Area	7.7	7.7	100%	0.0	0.0	0.0	0.0	0%
10	Queensview-Morrison Office Park	0.5	0.5	100%	0.0	0.0	0.0	0.0	0%
11	Woodward Business Park	0.0	0.0	-	0.0	0.0	0.0	0.0	-
12	Colonnade Business Park	11.8	11.8	100%	0.0	0.0	0.0	0.0	0%
13	Merivale Industrial Area	9.7	9.7	100%	0.0	0.0	0.0	0.0	0%
14	Rideau Heights Business Park	4.5	4.5	100%	0.0	0.0	0.0	0.0	0%
	Sub-Total West of Rideau River	***34.1***	***34.1***	***100%***	***0.0***	***0.0***	***0.0***	***0.0***	***0%***
	Inside Greenbelt East of Rideau River								
18	Rideau North Industrial District	1.1	1.1	100%	0.0	0.0	0.0	0.0	0%
19	Riverside-Uplands	15.3	6.6	43.3%	0.7	0.0	8.0	8.7	56.7%
20	Hunt Club North Field Aviation Area	11.5	0.0	0%	11.5	0.0	0.0	11.5	100%
21	Limebank North Business Area	39.4	0.0	0%	39.4	0.0	0.0	39.4	100%
22	Airport South Area	45.7	0.0	0%	45.7	0.0	0.0	45.7	100%
23	Airport - Lester Sector	6.6	0.0	0%	6.6	0.0	0.0	6.6	100%
24	Airport Gateway Business Park	28.7	0.0	0%	28.7	0.0	0.0	28.7	100%
25	South Walkley-Albion Industrial Area	20.3	14.1	69.8%	0.0	0.0	6.1	6.1	30.2%
26	Ottawa South Business Park	7.0	5.4	77.4%	0.0	0.0	1.6	1.6	22.6%
27	Hawthorne-Stevenage Industrial Area	74.1	35.2	47.5%	29.5	0.0	9.5	38.9	52.5%
28	Sheffield Industrial Area	3.3	3.3	100.0%	0.0	0.0	0.0	0.0	0%
29	Newmarket-Cyrville Industrial Area	7.5	7.5	100.0%	0.0	0.0	0.0	0.0	0%
30	Industrial Avenue Business Park	10.2	0.0	0.0%	10.2	0.0	0.0	10.2	100%
31	Coventry Industrial Area	0.0	0.0	-	0.0	0.0	0.0	0.0	-
32	Vanier Parkway	0.0	0.0	-	0.0	0.0	0.0	0.0	-
33	National Research Council	17.3	0.0	0%	17.3	0.0	0.0	17.3	100%
34	Canotek Business Park	7.9	3.6	45.0%	0.0	0.0	4.4	4.4	55.0%
	Sub-Total East of Rideau River	***295.9***	***76.8***	***26.0%***	***189.6***	***0.0***	***29.5***	***219.1***	***74.0%***
	Total Inside Greenbelt	**329.9**	**110.9**	**33.6%**	**189.6**	**0.0**	**29.5**	**219.1**	**66.4%**
	Urban Centres Outside of Greenbelt								
1	Kanata West Business Park	124.7	110.4	88.5%	0.0	13.7	0.5	14.3	11.5%
3	Kanata South Business Park	47.3	47.0	99.4%	0.0	0.0	0.3	0.3	0.6%
4	Terry Fox Business Park	15.9	15.9	100%	0.0	0.0	0.0	0.0	0%
5	Hazeldean Industrial Area	0.6	0.6	100%	0.0	0.0	0.0	0.0	0%
6	Kanata Town Centre Industrial Area	2.0	2.0	100%	0.0	0.0	0.0	0.0	0%
7	Kanata North Business Park	86.6	86.5	99.9%	0.0	0.0	0.1	0.1	0.1%
	Sub-Total Kanata	***277.2***	***262.6***	***94.7%***	***0.0***	***13.7***	***0.9***	***14.7***	***5.3%***
2	Stittsville Business Park	4.8	4.8	100%	0.0	0.0	0.0	0.0	0%
	Sub-Total Stittsville	***4.8***	***4.8***	***100%***	***0.0***	***0.0***	***0.0***	***0.0***	***0%***
9	416 Business Park	132.6	128.0	96.5%	0.0	0.0	4.6	4.6	3.5%
15	South Merivale Business Park	53.0	53.0	100%	0.0	0.0	0.0	0.0	0%
	Sub-Total South Nepean	***185.6***	***181.0***	***97.5%***	***0.0***	***0.0***	***4.6***	***4.6***	***2.5%***
16	Riverside South Business Park	189.2	132.6	70.1%	56.6	0.0	0.0	56.6	29.9%
	Sub-Total Riverside South	***189.2***	***132.6***	***70.1%***	***56.6***	***0.0***	***0.0***	***56.6***	***29.9%***
17	Albion-Leitrim Industrial Area	66.4	22.6	34.0%	14.7	0.0	29.0	43.8	66.0%
	Sub-Total Leitrim	***66.4***	***22.6***	***34.0%***	***14.7***	***0.0***	***29.0***	***43.8***	***66.0%***
35	Youville Business Park	0.5	0.5	100%	0.0	0.0	0.0	0.0	0%
36	Ottawa River Business Park	20.4	18.4	90.4%	0.0	1.9	0.0	1.9	9.6%
37	Taylor Creek Business Park	7.2	7.1	99.3%	0.0	0.0	0.1	0.1	0.7%
38	Cardinal Creek Business Park	12.3	3.6	29.4%	0.0	0.0	8.7	8.7	70.6%
39	South Orleans Industrial Park	127.5	119.2	93.5%	0.0	0.0	8.3	8.3	6.5%
	Sub-Total Orléans	***167.9***	***148.9***	***88.7%***	***0.0***	***1.9***	***17.1***	***19.0***	***11.3%***
	Total Urban Centres	**891.0**	**752.4**	**84.4%**	**71.3**	**15.7**	**51.7**	**138.6**	**15.6%**
	TOTAL URBAN	**1,220.9**	**863.2**	**70.7%**	**260.9**	**15.7**	**81.2**	**357.7**	**29.3%**
	RURAL								
	Rural West								
101	A.G Reed Industrial Area	72.1	67.1	93.0%	0.0	0.0	5.1	5.1	7.0%
102	Carp Road Corridor Rural Employment Area	293.4	293.4	100%	0.0	0.0	0.0	0.0	0%
103	Carp Airport Industrial Area	88.2	88.2	100%	0.0	0.0	0.0	0.0	0%
104	Ashton Industrial Area	23.0	23.0	100%	0.0	0.0	0.0	0.0	0%
105	Westwood Industrial Area	30.9	29.1	94.2%	0.0	1.8	0.0	1.8	5.8%
106	Richmond Industrial Area	58.1	58.1	100%	0.0	0.0	0.0	0.0	0%
107	Moodie Drive Industrial Area	7.0	7.0	100%	0.0	0.0	0.0	0.0	0%
108	Jordel Agri-Industrial Commercial Park	42.2	42.2	100%	0.0	0.0	0.0	0.0	0%
	Sub-Total Rural West of Rideau R.	***614.8***	***608.0***	***98.9%***	***0.0***	***1.8***	***5.1***	***6.8***	***1.1%***
	Rrural East								
109	South Gloucester Industrial Area	73.6	69.6	94.5%	0.0	0.0	4.0	4.0	5.5%
110	Gordon McKeown Industrial Area	11.5	6.1	52.7%	0.0	0.0	5.5	5.5	47.3%
111	Highway 31-South Greely Industrial Area	90.9	90.9	100%	0.0	0.0	0.0	0.0	0%
112	IndCum Industrial Area	70.5	70.5	100%	0.0	0.0	0.0	0.0	0%
113	Vars Business Park	62.4	62.4	100%	0.0	0.0	0.0	0.0	0%
114	Vars Cement	40.8	40.8	100%	0.0	0.0	0.0	0.0	0%
	Sub-Total Rural East of Rideau R.	***349.7***	***340.2***	***97.3%***	***0.0***	***0.0***	***9.5***	***9.5***	***2.7%***
	TOTAL RURAL	**964.6**	**948.2**	**98.3%**	**0.0**	**1.8**	**14.6**	**16.3**	**1.7%**
	TOTAL OTTAWA	**2,185.5**	**1,811.5**	**82.9%**	**260.9**	**17.5**	**95.7**	**374.1**	**17.1%**

[1] Federal Owners include all Federal Agencies and Departments, the National Capital Commission and the Airport Authority

Table 3 does not include 3.4 ha of land coded as expansion lots owned by the Canada Science and Technology Museum in the Sheffield Industrial Park.

All Federally-owned (including the National Capital Commission and the Ottawa Macdonald-Cartier International Airport Authority) vacant industrial land is found in the urban area east of the Rideau River. Under the terms of a long-term 60 year Ground Lease with Transport Canada (beginning in February of 1997 along with provisions to extend to 80 years), the Ottawa Macdonald-Cartier International Airport Authority is tasked with the management and operation of the airport as well as with development of airport lands. The Airport Authority is a Non-Share (Not-for-Profit) Capital Corporation incorporated without share capital and obliged to reinvest earnings in its operations, facilities and infrastructure development.

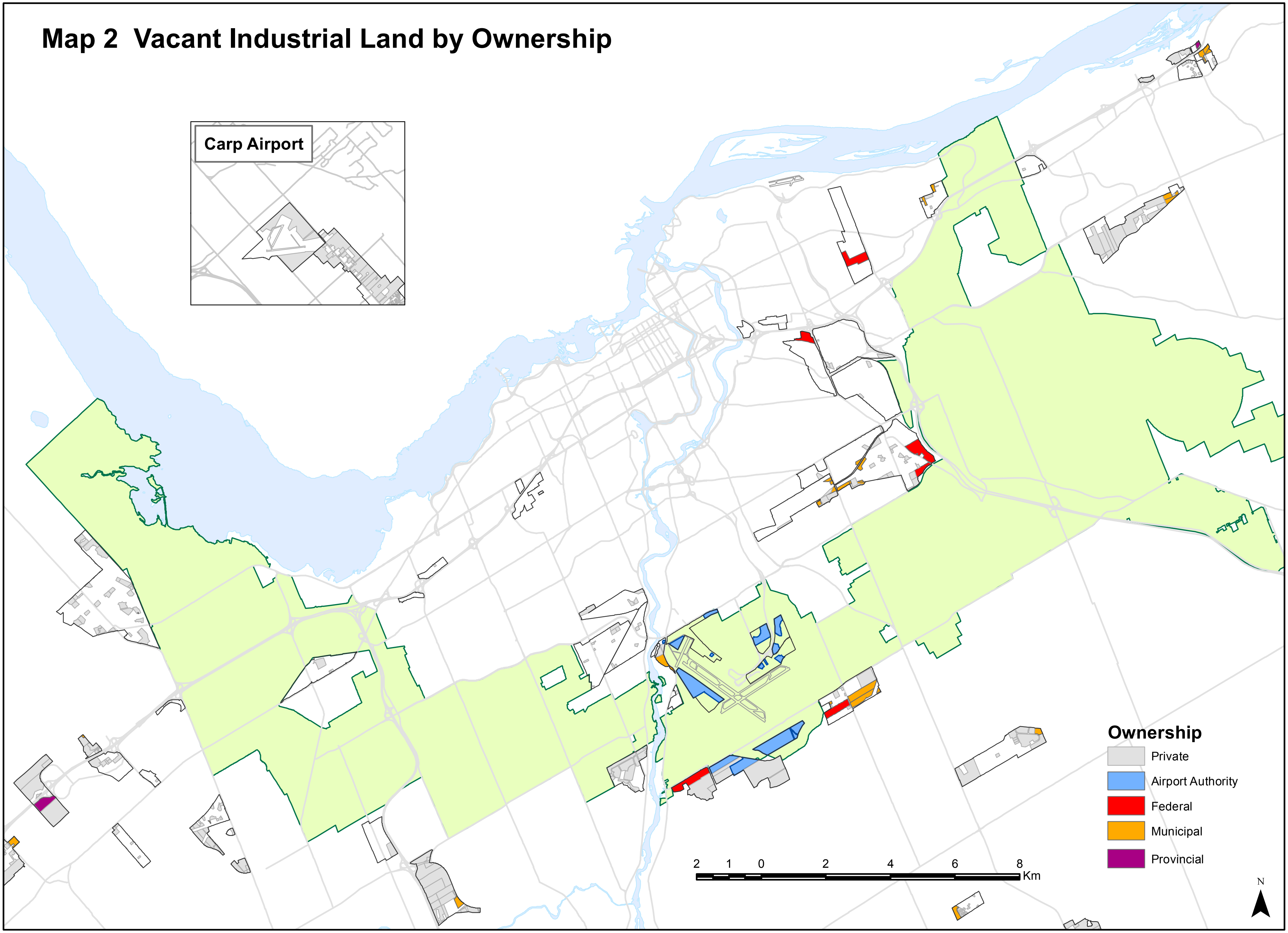
The City of Ottawa owns about 96 net ha of vacant industrial land, scattered through all parts of the city. Approximately 30 net ha are located in the southeast inside the Greenbelt and almost 52 net ha are scattered across suburban industrial areas. Another 14.6 net ha owned by the City in the rural area is distributed throughout the A.G. Reed, South Gloucester and Gordon McKeown Industrial Areas.

The provincial government owns only 17.5 net ha of vacant industrial land, split between Orléans (of which a small part is used as a storage facility for MTO), a prime location in the Kanata West Business Park and a small site in the Westwood Industrial Area.

Public ownership can influence the manner, timing and availability of how these lands are developed. However, development opportunities on public lands are sometimes constrained. For example, lands in the NRC area will likely be retained for NRC, CSIS or other federal uses and the NCC's land holdings in the Stevenage-Hawthorne area have yet to be put up for sale, even though the property has been zoned for heavy industry for several years. Development on any of the industrial areas controlled by the Airport Authority is limited to employers willing to accept a land-lease arrangement, although some sites have proven to be successful particularly in the high visibility area at Hunt Club and River Road.

It is difficult to assess overall private ownership patterns as many parcels are owned by numbered companies. However, it appears that local development interests along with investment and holding companies own about 82% of the vacant industrial land in the suburban centres and about 60% in the rural area. The remaining vacant land parcels are owned by private individuals.

Map 2 Vacant Industrial Land by Ownership



Servicing

All vacant lands inside the Greenbelt (with the exception of Rideau North) are serviced by both water and sewer. The Master Servicing and Transportation Study covering all lands managed by the Airport Authority has been prepared in order to provide a strategic framework for more detailed analysis. The Airport Authority provides piped services to lands inside the airport boundary in an internal system that connects to City mains at the edge of its lands.

Of the 891 net ha of vacant urban industrial land outside the Greenbelt, about a third (307.6 net ha) is already serviced with both water and sewer, 5.9 net ha in the Albion-Leitrim area is serviced by private wells, and the remaining 577.4 net ha require infrastructure improvements before development can occur.

Servicing improvements including major and local water and sewer extensions will be required in:

- west part of Kanata West
- throughout the 416 Business Park
- throughout Riverside South employment area
- the eastern part of Albion-Leitrim (most of the western parcels are on private services)
- western section of South Orléans

Development in the rural area is typically on private wells and septic systems. A few industrial areas are partially serviced. These include the A.G. Reed and South Gloucester area which have piped water but private septic systems. The Richmond Industrial Area may be developed with private wells and a central sewer system or on full services.

LAND CONSUMPTION

A total of 106.8 net ha of industrial land were developed on vacant lands in the last two years, made up of 61.8 ha in 2010 and 45 ha in 2011. The 2010 annual rate registered slightly above the 25 year city-wide average of approximately 54 ha per year, while in 2011 the annual rate dropped below this figure. Development on expansion lots accounted for 1.4 ha and another 8.2 ha were developed as roads, however these land areas are not counted as part of the vacant land supply or consumption rate[1].

A total of 43 ha (24.4 ha in 2010, 18.8 ha in 2011) of vacant land was consumed inside the Greenbelt. Most of this development occurred in the east, especially in the Hawthorne-Stevenage, Canotek and the Hunt Club North Field Aviation industrial areas. This level of consumption resulted in a slight decrease in the long-term average annual rate for the inside Greenbelt area from 24.5 ha in 2009 to 24.2 ha at the end of 2011.

[1] Expansion lots and existing road rights-of-way are separately identified in this report's maps. Land areas for either use are not utilized in reporting supply and or consumption rates. Large lots are already netted down by a factor of 15% to take account of future roads on these lots.

Table 4. Development on Industrial Lands, 2010 and 2011

Map Ref	Industrial Area	Development During 2010 and 2011				
		On Vacant Lands (gross ha)			On Other Lands (gross ha)	
		2010	2011	Total	On Expansion	New Roads
	URBAN					
	Inside Greenbelt West of Rideau River					
8	Bells Corners Employment Area	0.0	0.0	0.0	0.0	0.0
10	Queensview-Morrison Office Park	0.0	0.9	0.9	0.0	0.0
11	Woodward Business Park	0.0	0.0	0.0	0.0	0.0
12	Colonnade Business Park	0.0	0.0	0.0	0.0	0.0
13	Merivale Industrial Area	1.6	1.0	2.6	0.0	0.0
14	Rideau Heights Business Park	0.9	0.0	0.9	0.0	0.0
	Sub-Total West of Rideau River	***2.5***	***1.9***	***4.4***	***0.0***	***0.0***
	Inside Greenbelt East of Rideau River					
18	Rideau North Industrial District	0.0	0.0	0.0	0.0	0.0
19	Riverside-Uplands	0.0	0.0	0.0	0.0	0.2
20	Hunt Club North Field Aviation Area	1.6	0.4	2.0	0.0	0.0
21	Limebank North Business Area	0.0	0.0	0.0	0.0	0.0
22	Airport South Area	0.0	0.0	0.0	0.0	0.0
23	Airport - Lester Sector	0.0	0.0	0.0	0.0	0.0
24	Airport Gateway Business Park	0.0	13.4	13.4	0.0	0.0
25	South Walkley-Albion Industrial Area	0.0	0.0	0.0	0.0	0.0
26	Ottawa South Business Park	0.0	0.0	0.0	0.0	0.0
27	Hawthorne-Stevenage Industrial Area	0.5	2.4	2.9	0.0	0.0
28	Sheffield Industrial Area	0.5	0.0	0.5	0.0	0.0
29	Newmarket-Cyrville Industrial Area	0.0	0.6	0.6	0.0	0.0
30	Industrial Avenue Business Park	0.0	0.0	0.0	0.0	0.0
31	Coventry Industrial Area	0.0	0.0	0.0	0.0	0.0
32	Vanier Parkway	0.0	0.0	0.0	0.0	0.0
33	National Research Council	19.1	0.0	19.1	0.0	0.0
34	Canotek Business Park	0.0	0.0	0.0	0.0	0.6
	Sub-Total East of Rideau River	***21.7***	***16.9***	***38.6***	***0.0***	***0.8***
	Total Inside Greenbelt	**24.2**	**18.8**	**43.0**	**0.0**	**0.8**
	Urban Centres Outside of Greenbelt					
1	Kanata West Business Park	0.0	0.0	0.0	0.0	0.0
3	Kanata South Business Park	0.0	1.2	1.2	0.0	0.0
4	Terry Fox Business Park	0.0	0.0	0.0	0.0	0.0
5	Hazeldean Industrial Area	0.0	0.0	0.0	0.0	0.0
6	Kanata Town Centre Industrial Area	0.0	0.0	0.0	0.0	0.0
7	Kanata North Business Park	0.0	14.8	14.8	0.0	0.2
	Sub-Total Kanata	***0.0***	***16.1***	***16.1***	***0.0***	***0.2***
2	Stittsville Business Park	1.3	0.0	1.3	0.0	0.0
	Sub-Total Stittsville	**1.3**	**0.0**	**1.3**	**0.0**	**0.0**
9	416 Business Park	0.0	0.0	0.0	0.0	0.0
15	South Merivale Business Park	0.0	0.0	0.0	0.0	0.0
	Sub-Total South Nepean	***0.0***	***0.0***	***0.0***	***0.0***	***0.0***
16	Riverside South Business Park	0.0	0.0	0.0	0.0	0.0
	Sub-Total Riverside South	***0.0***	***0.0***	***0.0***	***0.0***	***0.0***
17	Albion-Leitrim Industrial Area	0.70	0.0	0.7	0.0	0.30
	Sub-Total Leitrim	**0.7**	**0.0**	**0.7**	**0.0**	**0.3**
35	Youville Business Park	1.0	0.0	1.0	0.0	0.0
36	Ottawa River Business Park	0.0	0.0	0.0	0.0	0.0
37	Taylor Creek Business Park	2.1	0.0	2.1	0.0	0.0
38	Cardinal Creek Business Park	0.0	0.0	0.0	0.0	0.0
39	South Orleans Industrial Park	4.0	0.0	4.0	0.0	0.8
	Sub-Total Orléans	***7.1***	***0.0***	***7.1***	***0.0***	***0.8***
	Total Urban Centres	**9.1**	**16.1**	**25.2**	**0.0**	**1.3**
	TOTAL URBAN	**33.3**	**34.8**	**68.2**	**0.0**	**2.1**
	RURAL					
	Rural West					
101	A.G Reed Industrial Area	7.3	4.4	11.8	0.0	0.0
102	Carp Road Corridor Rural Employment Area	2.0	2.5	4.5	1.4	0.0
103	Carp Airport Industrial Area	0.0	0.0	0.0	0.0	0.0
104	Ashton Industrial Area	0.0	0.0	0.0	0.0	0.0
105	Westwood Industrial Area	0.0	0.7	0.7	0.0	0.0
106	Richmond Industrial Area	0.0	0.0	0.0	0.0	0.0
107	Moodie Drive Industrial Area	0.0	0.0	0.0	0.0	0.0
108	Jordel Agri-Industrial Commercial Park	0.0	0.0	0.0	0.0	0.0
	Sub-Total Rural West of Rideau River	***9.4***	***7.6***	***17.0***	***1.4***	***0.0***
	Rural East					
109	South Gloucester Industrial Area	1.5	1.7	3.2	0.0	4.3
110	Gordon McKeown Industrial Area	1.1	0.6	1.6	0.0	1.7
111	Highway 31-South Greely Industrial Area	3.5	0.0	3.5	0.0	0.0
112	IndCum Industrial Area	7.8	0.4	8.2	0.0	0.0
113	Vars Business Park	0.0	0.0	0.0	0.0	0.0
114	Vars Cement	5.2	0.0	5.2	0.0	0.0
	Sub-Total Rural East of Rideau River	***19.1***	***2.6***	***21.7***	***0.0***	***6.0***
	TOTAL RURAL	**28.4**	**10.2**	**38.7**	**1.4**	**6.0**
	TOTAL OTTAWA	**61.8**	**45.0**	**106.8**	**1.4**	**8.2**

Table 5. Annual and Average Land Consumption for Industrial Uses, 1985 -2011

Average calculated annually with base year 1985

	Urban Inside Greenbelt		Urban Outside Greenbelt		Total Urban		Rural		Total Ottawa	
Year	Annual*	Average	Annual*	Average	Annual*	Average	Annual*	Average	Annual*	Average
1985	56.4	56.4	17.4	17.4	73.8	73.8	22.9	22.9	96.7	96.7
1986	56.4	56.4	17.4	17.4	73.8	73.8	22.9	22.9	96.7	96.7
1987	82.3	65.0	28.6	21.1	110.9	86.1	17.8	21.2	128.7	107.3
1988	28.2	55.8	31.7	23.8	59.9	79.6	8.1	17.9	68.0	97.5
1989	42.3	53.1	21.0	23.2	63.3	76.3	18.7	18.1	82.0	94.4
1990	36.9	50.4	13.7	21.6	50.6	72.0	16.5	17.8	67.1	89.9
1991	12.3	45.0	4.3	19.2	16.6	64.1	4.4	15.9	21.0	80.0
1992	10.0	40.6	7.0	17.6	17.0	58.2	4.7	14.5	21.7	72.7
1993	26.8	39.1	16.4	17.5	43.2	56.6	4.4	13.4	47.6	69.9
1994	14.9	36.6	8.8	16.6	23.7	53.3	2.9	12.3	26.6	65.6
1995	23.2	35.4	9.1	15.9	32.3	51.4	17.8	12.8	50.1	64.2
1996	8.6	33.2	19.8	16.3	28.4	49.4	2.6	12.0	30.9	61.4
1997	8.6	31.3	19.8	16.5	28.4	47.8	2.6	11.2	30.9	59.1
1998	18.3	30.4	21.4	16.9	39.7	47.2	12.3	11.3	52.0	58.6
1999	18.3	29.6	21.4	17.2	39.7	46.7	12.3	11.4	52.0	58.1
2000	35.6	29.9	46.2	19.0	81.8	48.9	5.7	11.0	87.4	60.0
2001	35.6	30.3	46.2	20.6	81.8	50.9	5.7	10.7	87.4	61.6
2002	10.6	29.2	14.7	20.3	25.3	49.4	3.7	10.3	29.0	59.8
2003	10.6	28.2	14.7	20.0	25.3	48.2	3.7	10.0	29.0	58.1
2004	24.2	28.0	20.3	20.0	44.5	48.0	9.7	10.0	54.2	57.9
2005	7.8	27.0	5.2	19.3	13.0	46.3	2.9	9.6	15.9	55.9
2006	16.3	26.6	28.2	19.7	44.5	46.2	13.6	9.8	58.1	56.0
2007	8.9	25.8	18.2	19.6	27.1	45.4	7.8	9.7	34.9	55.1
2008	9.3	25.1	8.3	19.1	17.6	44.2	22.7	10.3	40.3	54.5
2009	9.1	24.5	16.1	19.0	25.2	43.5	17.2	10.5	42.4	54.0
2010	24.2	24.4	6.4	18.5	30.6	43.0	28.4	11.2	59.0	54.2
2011	18.8	24.2	4.9	18.0	23.7	42.3	10.2	11.2	33.9	53.5

Average for each 5 year interval

1985-89	265.5	53.1	116.1	23.2	381.6	76.3	90.4	18.1	472.0	94.4
1990-94	100.9	20.2	50.2	10.0	151.1	30.2	32.9	6.6	184.0	36.8
1995-99	77.0	15.4	91.4	18.3	168.4	33.7	47.5	9.5	215.9	43.2
2000-04	116.6	23.3	141.9	28.4	258.5	51.7	28.4	5.7	286.9	57.4
2005-09	51.4	10.3	76.0	15.2	127.4	25.5	64.2	12.8	191.6	38.3

Average for the last 2 year interval

2010-11	43.0	21.5	11.3	5.6	54.2	27.1	38.7	19.3	92.9	46.4

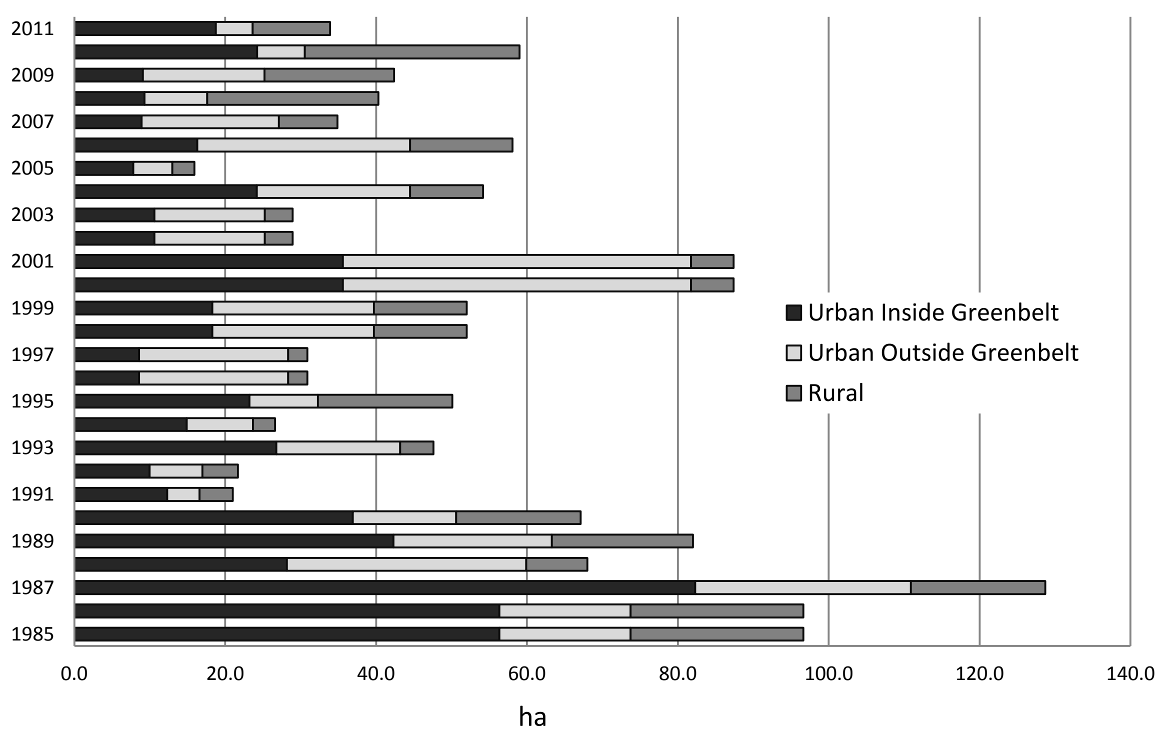
*Development for both industrial and non-industrial uses is included in Table 4. In Table 5, annual consumption excludes non-industrial uses.

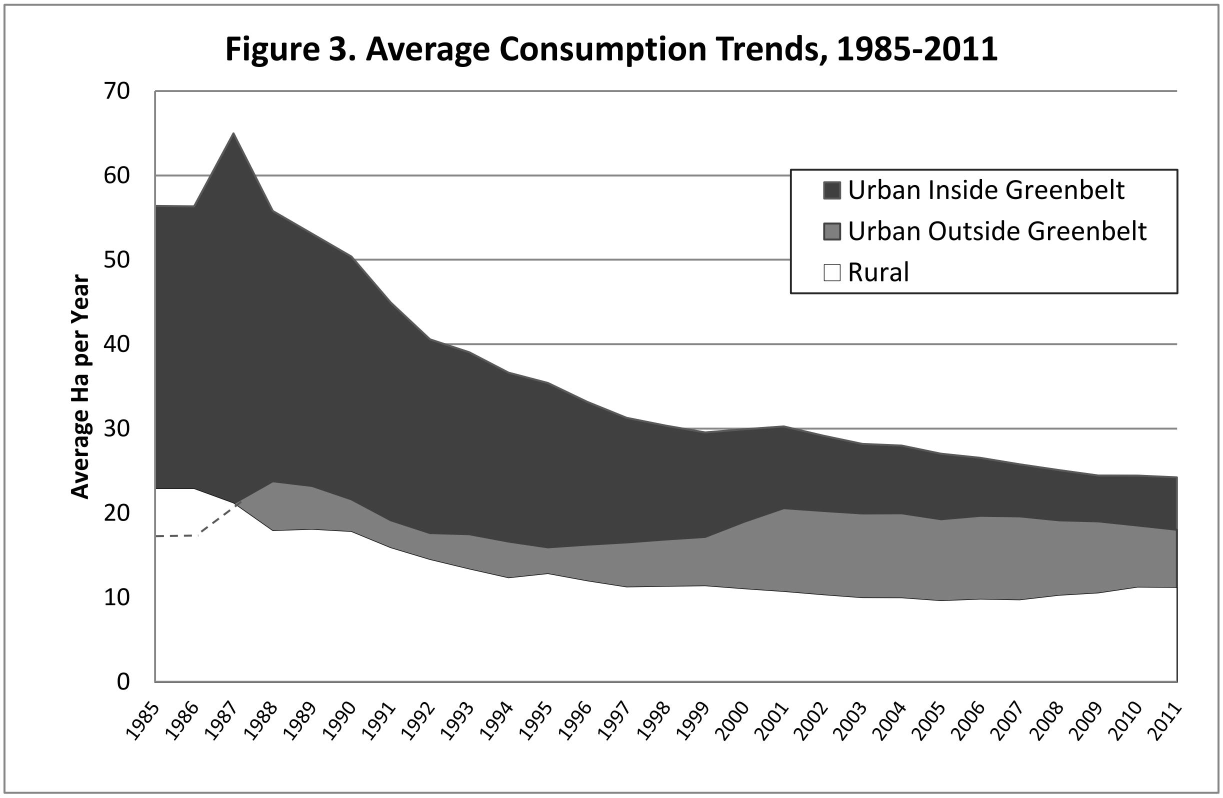
Over the 2010-2011 period a total of 25.5 ha (9.1 ha and 16.1 ha respectively) of suburban industrial land outside the Greenbelt were consumed. Much of this land (14.8 ha), was developed in the Kanata North Business Park (Table 4). No industrial land was developed in the South Nepean area in the last two years. During 2010 and 2011, suburban industrial land consumption continued the gradual decline in the 27 year average annual rate which fell from 19 ha in 2009 to 18 ha in 2011 (Table 5).

Consumption in the rural area occurred at an above average pace in 2010 (28.4 ha), the highest amount of land consumed in the rural area in 27 years. Consumption then fell below average in 2011 (10.2 ha). Eight of the fourteen rural industrial areas experienced at least some new development in the last two years. Development took place almost evenly in both the eastern and western portions of the rural area. The largest consumption of rural land during 2010-11 took place in the A.G. Reed Industrial Area, consuming 11.8 ha during this time period. Of the 21.7 ha developed in the east, 8.2 ha were in the IndCum Industrial Area.

Over the last 27 years there have been significant fluctuations in consumption, particularly in the urban area, as shown in Figure 2, derived from Table 5. This highly variable pattern follows economic cycles. The strong economy of the mid and late 1980s fostered high industrial land consumption, peaking in 1987. The recession years of 1990s were marked by low consumption, dipping to only 22 ha in 1991. A new period of growth began in the latter part of the 1990s, peaking during the high-tech boom of 2000-01. The downturn in the city's technology industry post-2001 led to high suburban office vacancy rates, especially in Kanata, which further dampened already low land consumption. By 2005 consumption fell to an all-time low of only 15.9 ha. Since then land consumption has risen slightly.

Figure 2. Annual Industrial Land Consumption, 1985-2011





Land Consumption Rate

Applying an average consumption rate is the most straightforward means of estimating the future supply of industrial land in demand-years of land. Demand-years are determined by calculating average annual consumption over a specific period of time and dividing that into the available supply.

Older editions of this survey applied a land consumption rate based on the average of land developed for industrial uses since 1985. With a few exceptions, this was considered acceptable because industrial area boundaries and the general types of development occurring on industrial land were fairly consistent from year to year. Reports published after 2001 introduced two consumption rates for the urban area that took into account the amount of industrial land being consumed for both industrial and non-industrial uses (i.e. non-employment uses) as shown in Figure 4. This alternative consumption rate was intended to address situations where industrial lands were being consumed by non-industrial or non-employment uses, such as golf courses and residential development. This experience was primarily confined to the 1991-2001 decade, especially the 1998 to 2001 period. Since then, little non-industrial development occurred until 2010 with 2.7 ha developed. In 2011, 11.1 ha of industrial land was consumed for non-industrial uses.

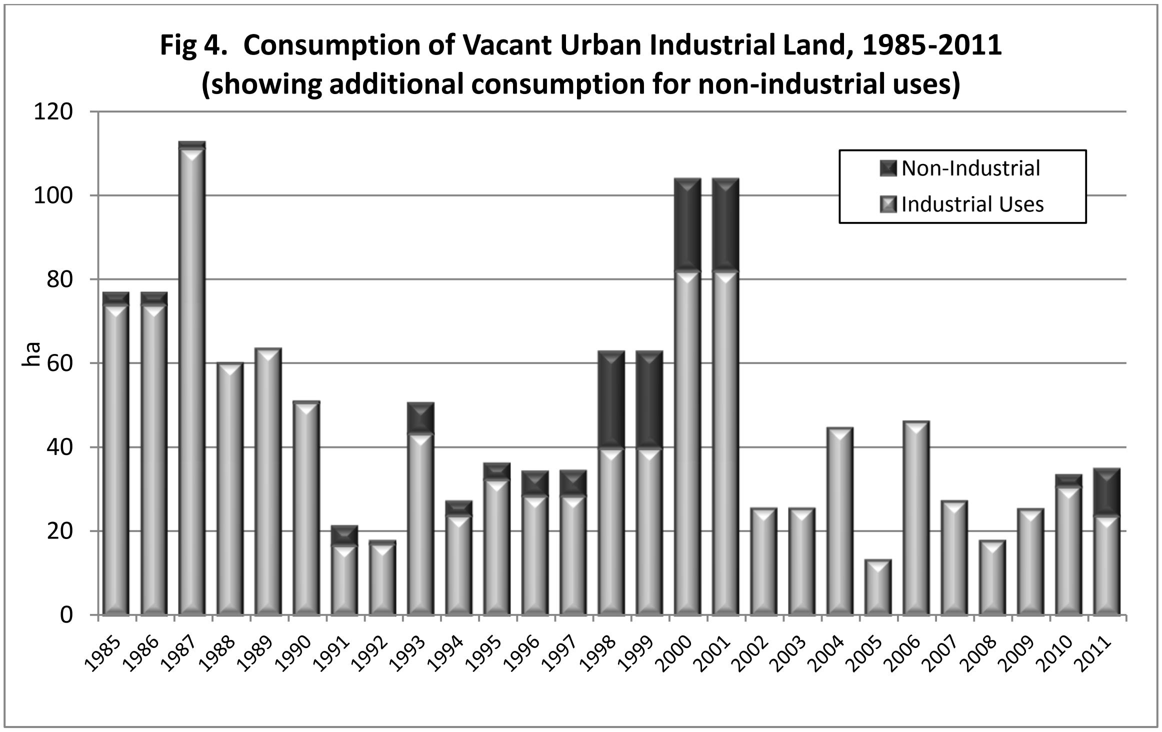


Table 6 and Figures 5 and 6 show annual and running average consumption from 1985 onward. In general, the running average has been declining since 1985 although small peaks can be seen during periods of rapid growth.

Although industrial land absorption in the urban area experienced some rebound during the last two years (30.6 ha in 2010 and 23.7 ha in 2011), overall average absorption rates continued to fall and hit a new running average low of 42.3 ha per year for industrial (employment) uses only, or 47.6 ha per year when all uses are included.

In 2010, land absorption in the rural area was the highest ever recorded (28.4 ha), surpassing the previous record of 22.7 ha developed in 2008. In 2011 the 27 year running average of 11.2 ha per year continued the increase of recent years.

Applying consumption rates over the last 27 years for both urban and rural areas to the vacant supply of 1,220.9 net ha and 964.6 net ha respectively, the estimated reserve for the urban area is approximately 29 years in the urban area, and 86 years in the rural area. Both estimates assume among other things that no new lands will be added or removed from the existing supply.

CONCLUSION

The 2010-11 period was one of restrained consumption of the city's supply of employment land. Overall, the supply of vacant industrial land should be more than sufficient to meet demand for well beyond 20 years.

Table 6. Land Development and Consumption Rates (net ha)

Period		URBAN						RURAL		
		Annual Land Consumption		Cumulative Land Consumption		Running Average Consumption Rate*		Annual Land Consumption	Cumulative Land Consumption	Running Average Consumption Rate*
Year	Yrs	Industrial Uses	All Uses	Industrial Uses	All Uses	Industrial Uses	All Uses			
1985	1	73.8	76.6	73.8	76.6	73.8	76.6	22.9	22.9	22.9
1986	2	73.8	76.6	147.5	153.2	73.8	76.6	22.9	45.8	22.9
1987	3	110.9	112.4	258.4	265.6	86.1	88.5	17.8	63.6	21.2
1988	4	59.9	59.9	318.3	325.5	79.6	81.4	8.1	71.7	17.9
1989	5	63.3	63.3	381.6	388.8	76.3	77.8	18.7	90.4	18.1
1990	6	50.6	50.8	432.2	439.6	72.0	73.3	16.5	106.9	17.8
1991	7	16.6	21.2	448.8	460.8	64.1	65.8	4.4	111.3	15.9
1992	8	17.0	17.7	465.8	478.5	58.2	59.8	4.7	116.0	14.5
1993	9	43.2	50.4	509.0	528.9	56.6	58.8	4.4	120.4	13.4
1994	10	23.7	27.1	532.7	556.0	53.3	55.6	2.9	123.3	12.3
1995	11	32.3	36.1	565.0	592.1	51.4	53.8	17.8	141.1	12.8
1996	12	28.4	34.2	593.4	626.3	49.4	52.2	2.6	143.7	12.0
1997	13	28.4	34.3	621.7	660.6	47.8	50.8	2.6	146.3	11.3
1998	14	39.7	62.6	661.4	723.2	47.2	51.7	12.3	158.6	11.3
1999	15	39.7	62.6	701.1	785.8	46.7	52.4	12.3	170.9	11.4
2000	16	81.8	103.6	782.9	889.4	48.9	55.6	5.7	176.6	11.0
2001	17	81.8	103.6	864.6	993.0	50.9	58.4	5.7	182.3	10.7
2002	18	25.3	25.3	889.9	1018.3	49.4	56.6	3.7	186.0	10.3
2003	19	25.3	25.3	915.2	1043.6	48.2	54.9	3.7	189.7	10.0
2004	20	44.5	44.5	959.7	1088.1	48.0	54.4	9.7	199.4	10.0
2005	21	13.0	13.0	972.7	1101.1	46.3	52.4	2.9	202.3	9.6
2006	22	46.0	46.0	1018.7	1147.1	46.3	52.1	13.6	215.9	9.8
2007	23	27.1	27.1	1045.8	1174.2	45.5	51.1	7.8	223.7	9.7
2008	24	17.6	17.6	1063.4	1191.8	44.3	49.7	22.7	246.4	10.3
2009	25	25.2	25.2	1088.6	1217.0	43.5	48.7	17.2	263.6	10.5
2010	26	30.6	33.3	1119.2	1250.3	43.0	48.1	28.4	292.0	11.2
2011	27	23.7	34.8	1142.8	1285.2	42.3	47.6	10.2	302.3	11.2

*Running average Consumption Rate is calculated from cumulative land consumption of the current year and all preceding years starting from 1985.

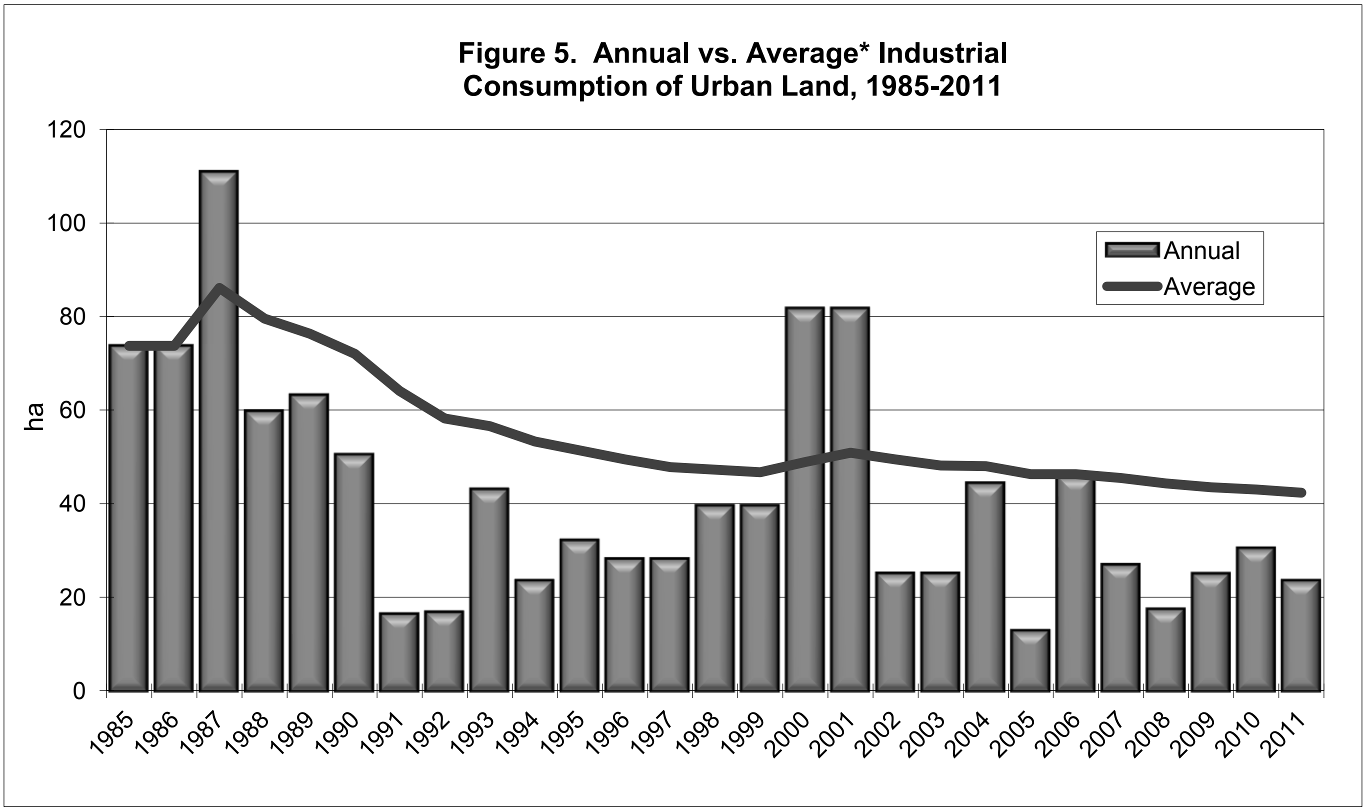


Figure 5. Annual vs. Average* Industrial
Consumption of Urban Land, 1985-2011
120
100
80
60
40
20
0
ha
Annual
Average
1985
1986
1987
1988
1989
1990
1991
1992
1993
1994
1995
1996
1997
1998
1999
2000
2001
2002
2003
2004
2005
2006
2007
2008
2009
2010
2011

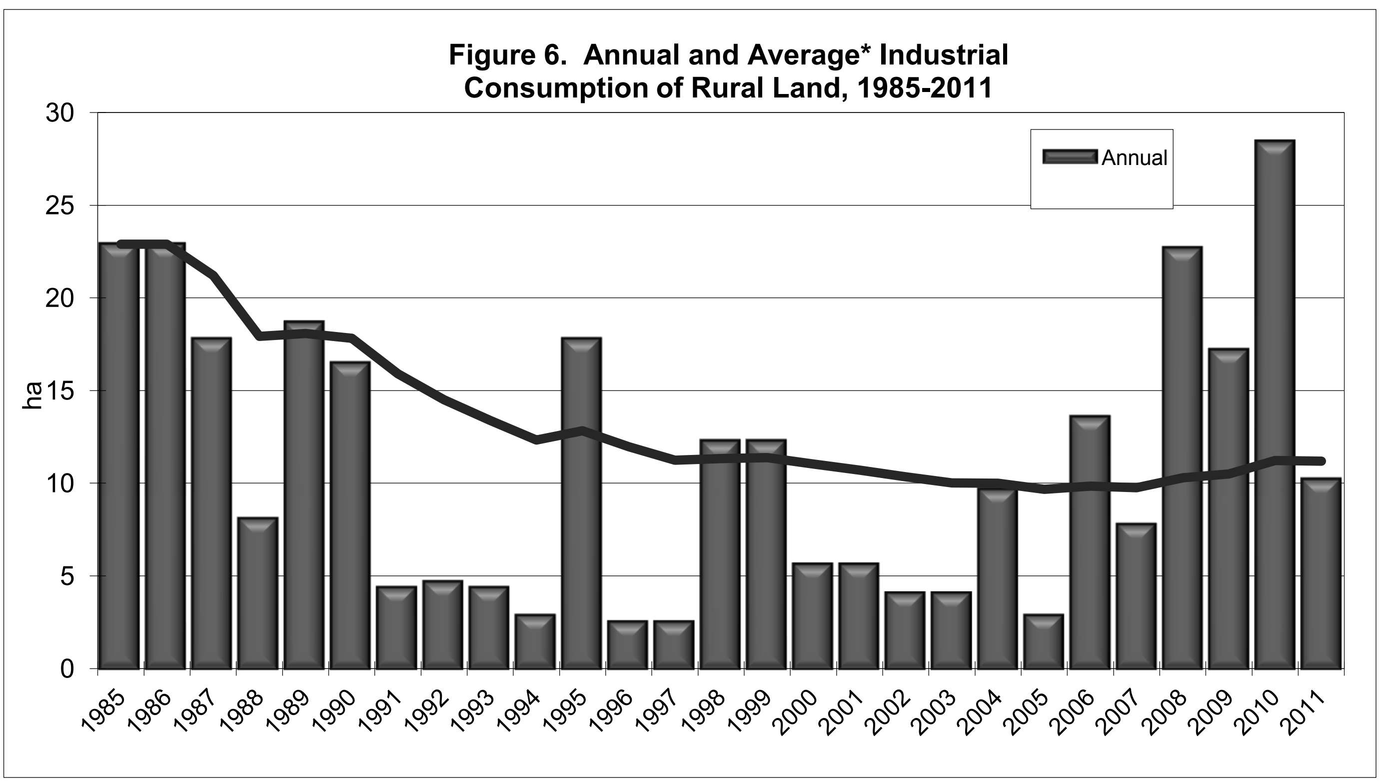


Figure 6. Annual and Average* Industrial
Consumption of Rural Land, 1985-2011
30
25
20
15
10
5
0
ha
Annual
1985
1986
1987
1988
1989
1990
1991
1992
1993
1994
1995
1996
1997
1998
1999
2000
2001
2002
2003
2004
2005
2006
2007
2008
2009
2010
2011