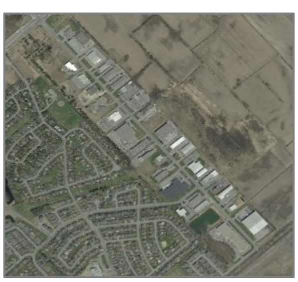
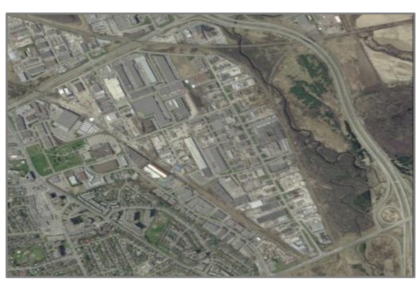
PLANNING AND GROWTH MANAGEMENT
URBANISME ET GESTION DE LA CROISSANCE

VACANT INDUSTRIAL AND BUSINESS PARK LANDS

INVENTORY

2014-15 Update





May 2016

INVENTORY OF VACANT INDUSTRIAL AND BUSINESS PARK LANDS, 2014-15 UPDATE

City of Ottawa
Planning and Growth Management Department
Policy Development and Urban Design Branch
Research and Forecasting Unit

May 2016

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Vacant Land Maps and Parcel Listings

INVENTORY OF VACANT INDUSTRIAL AND BUSINESS PARK LANDS, 2014-15 UPDATE

HIGHLIGHTS

The total city-wide supply of vacant industrial and business park land stood at 1,852 net hectares as of the end of December 2015. This is an increase of 35 net hectares since last reported for the end of 2013. Zoning changes in and around business parks accounted for most of the differences between the two time periods.

Approximately 54% (1,009 net ha) of the vacant land supply was located in the urban/suburban area, split between 256 net ha inside the Greenbelt and 753 net ha outside the Greenbelt. A total of 843 net ha of vacant land were provided in the rural area.

During 2014 and 2015, a total 38.6 ha of industrial land were developed, comprised of 16.1 ha in 2014 and 22.5 ha in 2015. This figure drops to 30.2 ha when land developed for non-industrial uses is excluded.

Nearly 85 percent of the land in business parks inside the Greenbelt had been developed as of the end of 2015. Of the 256 net ha that remain, 67% (172 ha) are in public ownership, primarily by the federal government (mostly the Airport Authority).

Using running average rates of consumption over the last 31 years, the city had an estimated 24 year supply of urban employment land at the end of 2015. The rural area has an even larger supply; at historic development rates there are over 81 years of rural supply.

PURPOSE AND COVERAGE

This survey reports on the inventory of vacant industrial and business park land in the urban, suburban and rural areas of the city of Ottawa as of the end of 2015. For brevity the balance of the report refers to these lands as "industrial".

Land covered by the survey in the urban and suburban areas are designated Employment Area or Enterprise Area in the Official Plan and also include 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.

As in previous surveys, 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 for all areas.

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.

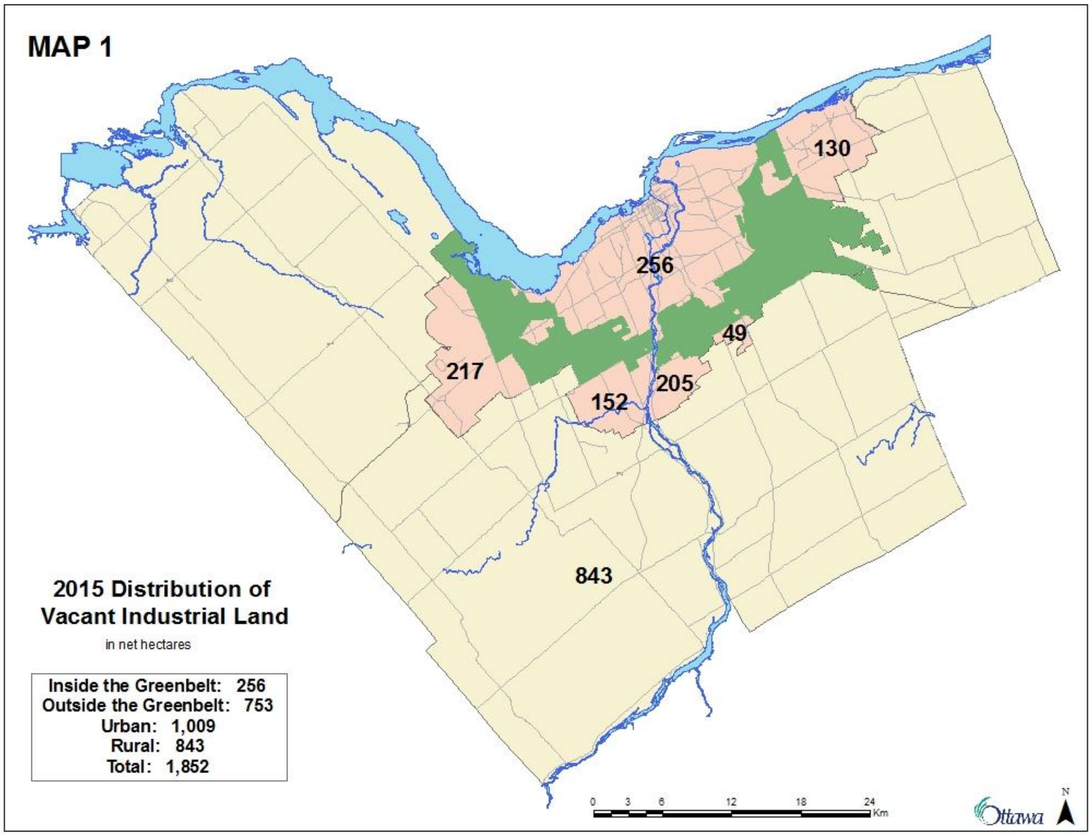
In most instances, land parcels based on ownership form the basic unit of observation. Parcels may be further subdivided based on variations in zoning or other factors. For technical information on the parcel mapping, refer to the Appendix.

This edition is the latest 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

Table 1 summarizes the total land area, including developed and undeveloped land, of each industrial area and business park in the city of Ottawa. The table notes any changes to the size of each area made since 2013 and the source of the change.

Table 2 shows there was a total of 1,852 net hectares (2,121 gross ha) of vacant industrial land across the city at the end of 2015. The distribution of these lands by major geographic area is illustrated on Map 1.



The urban and suburban area had 1,009 net ha of vacant industrial land, split between areas inside the Greenbelt, with 256.3 net ha, and 752.7 net ha in the suburban centres outside the Greenbelt. The rural part of Ottawa had 843.3 net ha. (Table 2)

Overall, the city-wide supply of vacant industrial land was up by approximately 18.1 net ha from 2013, primarily due to changes in the rural area. Changes to the total land supply were 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 38.6 ha were developed for industrial and other employment uses including development on expansion lots. Concurrently, parcels were added to business parks as a result of 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 2013 and 2015 (gross ha) (developed and undeveloped land)

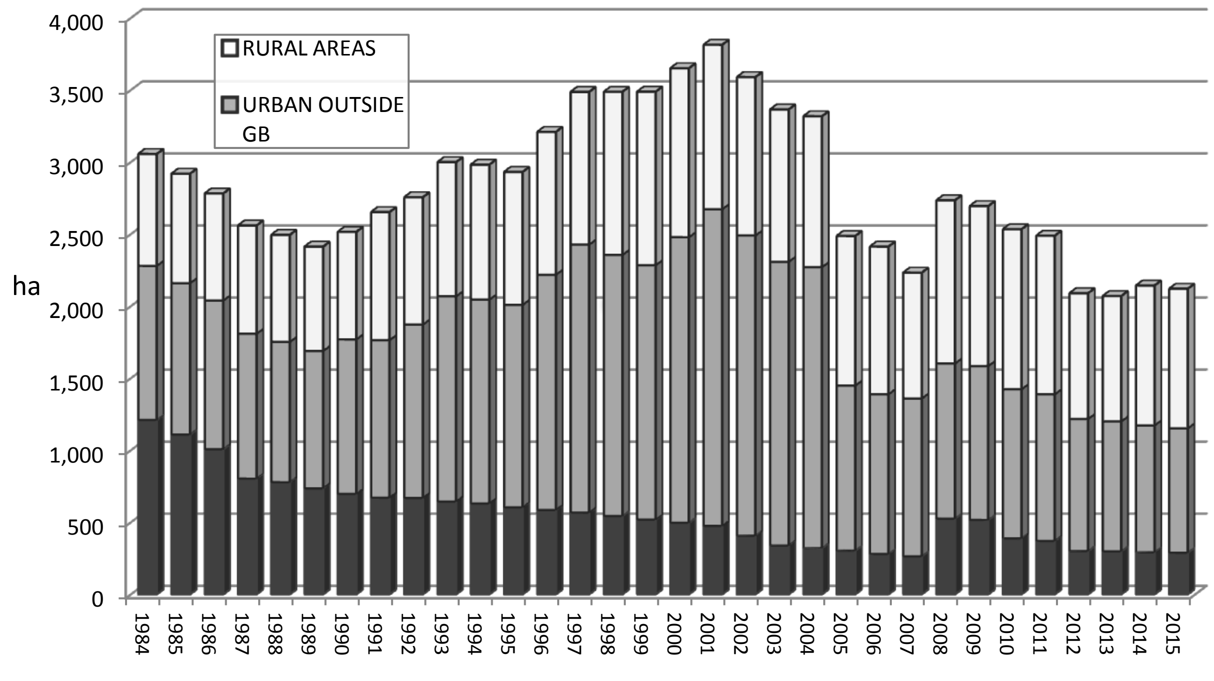
Map Ref	Industrial Area	Total 2013 ha	Total 2015 ha	Change 2013-2015	Comment
	URBAN				
	Inside Greenbelt West of Rideau River				
8	Bells Corners Employment Area	103.4	75.6	-27.8	removal of AM parcels fronting Richmond Rd.
10	Queensview-Morrison Office Park	32.0	32.0	0.0	no change
11	Woodward Business Park	51.5	51.5	0.0	no change
12	Colonnade Business Park	92.3	92.3	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	***540.4***	***512.6***	***-27.8***	
	Inside Greenbelt East of Rideau River				
18	Rideau North Industrial District	15.8	15.8	0.0	no change
19	Riverside-Uplands	18.7	18.7	0.0	no change
20	Hunt Club North Field Aviation Area	71.3	71.4	0.1	property line adjustments
21	Limebank North Business Area	69.7	69.7	0.0	no change
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	165.1	2.7	parcels added to match area on Schedule B
27	Hawthorne-Stevenage Industrial Area	313.4	313.4	0.0	no change
28	Sheffield Industrial Area	220.9	220.9	0.0	no change
29	Newmarket-Cyrville Industrial Area	150.6	150.6	0.0	no change
30	Industrial Avenue Business Park	98.6	86.8	-11.8	removal of AM parcels fronting St. Laurent Blvd.
31	Coventry Industrial Area	12.6	6.5	-6.1	removal of mixed use parcels
32	National Research Council	159.5	159.5	0.0	no change
33	Canotek Business Park	47.6	47.6	0.0	no change
	Sub-Total East of Rideau River	***1,680.1***	***1,665.0***	***-15.1***	
	Total Inside Greenbelt	**2,220.5**	**2,177.6**	**-42.9**	
	Urban Centres Outside of Greenbelt				
1	Kanata West Business Park	165.9	150.7	-15.3	proposed OPA and ZBA changes
3	Kanata South Business Park	81.3	75.3	-6.0	modification from zoning change
4	Terry Fox Business Park	72.0	72.0	0.0	no change
5	Hazeldean Industrial Area	16.0	12.0	-4.0	removal of AM parcels fronting Hazeldean Rd.
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	***825.3***	***800.1***	***-25.2***	
2	Stittsville Business Park	47.4	46.7	-0.7	removal of AM parcels fronting Hazeldean Rd.
	Sub-Total Stittsville	***47.4***	***46.7***	***-0.7***	
9	416 Business Park	167.7	167.6	0.0	no change
15	South Merivale Business Park	98.9	98.9	0.0	no change
	Sub-Total South Nepean	***266.5***	***266.5***	***0.0***	
16	Riverside South Business Park	201.4	240.8	39.4	removed closed ROW, modifications to match OP
	Sub-Total Riverside South	***201.4***	***240.8***	***39.4***	
17	Albion-Leitrim Industrial Area	153.9	136.6	-17.3	parcel redesignated to Greenbelt land
	Sub-Total Leitrim	***153.9***	***136.6***	***-17.3***	
34	Youville Business Park	41.2	41.2	0.0	no change
35	Ottawa River Business Park	31.6	25.4	-6.2	parcel removed - will not develop as industrial
36	Taylor Creek Business Park	34.0	34.0	0.0	no change
37	Cardinal Creek Business Park	24.6	24.6	0.0	no change
38	South Orleans Industrial Park	187.0	175.7	-11.3	modifications to mixed use centre
	Sub-Total Orléans	***318.3***	***300.8***	***-17.5***	
	Total Urban Centres	**1,812.9**	**1,791.5**	**-21.3**	
	TOTAL URBAN	**4,033.4**	**3,969.1**	**-64.3**	
	RURAL				
	Rural West				
101	A.G. Reed Industrial Area	159.0	159.0	0.0	no change
102	Carp Road Corridor Rural Employment Area	663.9	726.3	62.4	modifications from zoning change
103	Carp Airport Industrial Area	261.3	261.3	0.0	no change
104	Ashton Industrial Area	40.8	40.9	0.0	no change
105	Westwood Industrial Area	47.5	46.7	-0.8	EP area removed, zoning modifications
106	Richmond Industrial Area	84.7	84.7	0.0	no change
107	Moodie Drive Industrial Area	94.7	95.5	0.8	parcels added through zoning modifications
108	Jordel Agri-Industrial Commercial Park	49.7	49.7	0.0	no change
	Sub-Total Rural West of Rideau R.	***1,401.6***	***1,464.1***	***62.5***	
	Rural East				
109	South Gloucester Industrial Area	189.0	198.2	9.2	parcels added through zoning modifications
110	Gordon McKeown Industrial Area	43.9	44.0	0.0	no change
111	Highway 31-South Greely Industrial Area	162.7	162.7	0.0	no change
112	IndCum Industrial Area	116.5	130.3	13.8	parcels added through zoning modifications
113	Vars Business Park	140.5	149.2	8.6	parcel added through zoning modifications
114	Vars Cement	69.8	69.5	-0.3	property line adjustments
	Sub-Total Rural East of Rideau R.	***722.5***	***753.9***	***31.4***	
	TOTAL RURAL	**2,124.1**	**2,218.0**	**93.9**	
	TOTAL OTTAWA	**6,157.4**	**6,187.1**	**29.7**	

Table 2. Industrial Land Inventory 2015

Map Ref	Industrial Area	Total Industrial Area	Non-Vacant Land[1]	Vacant Land (gross ha)			Percent Built	Developed 2014-15[2]	Vacant Land (net ha)
				Parcels	Expansion	ROW			
	URBAN								
	Inside Greenbelt West of Rideau River								
8	Bells Corners Employment Area	75.6	67.8	7.7	0.0	0.0	89.8	0.0	6.6
10	Queensview-Morrison Office Park	32.0	31.5	0.5	0.0	0.0	98.5	0.0	0.5
11	Woodward Business Park	51.5	51.5	0.0	0.0	0.0	100.0	0.0	0.0
12	Colonnade Business Park	92.3	86.0	5.7	0.6	0.0	93.2	0.0	5.7
13	Merivale Industrial Area	159.3	153.1	4.4	1.4	0.5	96.1	1.0	4.4
14	Rideau Heights Business Park	101.9	97.5	4.5	0.0	0.0	95.6	0.0	4.5
	Sub-Total West of Rideau River	***512.6***	***487.4***	***22.7***	***2.1***	***0.5***	***95.1***	***1.0***	***21.5***
	Inside Greenbelt East of Rideau River								
18	Rideau North Industrial District	15.8	14.7	0.0	1.1	0.0	93.1	0.0	0.0
19	Riverside-Uplands	18.7	3.3	15.5	0.0	0.0	17.4	0.0	14.1
20	Hunt Club North Field Aviation Area	71.4	58.0	13.4	0.0	0.0	81.2	0.0	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	58.9	2.7	0.0	0.0	95.6	0.0	2.7
24	Airport Gateway Business Park	72.9	39.2	33.7	0.0	0.0	53.7	0.0	28.7
25	South Walkley-Albion Industrial Area	149.5	129.3	20.2	0.0	0.0	86.5	0.0	17.7
26	Ottawa South Business Park	165.1	154.6	6.8	3.6	0.0	93.7	1.6	6.8
27	Hawthorne-Stevenage Industrial Area	313.4	239.6	65.0	8.8	0.0	76.4	3.2	58.4
28	Sheffield Industrial Area	220.9	217.6	2.0	1.3	0.0	98.5	0.0	2.0
29	Newmarket-Cyrville Industrial Area	150.6	143.3	6.5	0.7	0.2	95.2	0.0	6.5
30	Industrial Avenue Business Park	86.8	86.8	0.0	0.0	0.0	100.0	0.0	0.0
31	Coventry Industrial Area	6.5	6.5	0.0	0.0	0.0	100.0	0.0	0.0
32	National Research Council	159.5	139.2	0.0	20.3	0.0	87.3	0.0	0.0
33	Canotek Business Park	47.6	43.7	1.1	2.8	0.0	91.9	2.9	1.1
	Sub-Total East of Rideau River	***1,665.0***	***1,359.4***	***266.9***	***38.5***	***0.2***	***81.6***	***7.7***	***234.7***
	Total Inside Greenbelt	**2,177.6**	**1,846.8**	**289.6**	**40.6**	**0.6**	**84.8**	**8.7**	**256.3**
	Urban Centres Outside of Greenbelt								
1	Kanata West Business Park	150.7	25.3	123.5	0.0	1.8	16.8	2.3	105.5
3	Kanata South Business Park	75.3	43.3	30.4	1.6	0.0	57.5	0.0	28.9
4	Terry Fox Business Park	72.0	58.3	13.7	0.0	0.0	80.9	0.0	12.7
5	Hazeldean Industrial Area	12.0	11.4	0.0	0.6	0.0	94.7	0.0	0.0
6	Kanata Town Centre Industrial Area	10.8	9.4	1.4	0.0	0.0	87.0	0.0	1.4
7	Kanata North Business Park	479.3	394.6	68.9	14.3	1.5	82.3	5.6	65.4
	Sub-Total Kanata	***800.1***	***542.3***	***237.9***	***16.5***	***3.3***	***67.8***	***7.9***	***213.9***
2	Stittsville Business Park	46.7	43.6	3.1	0.0	0.0	93.4	0.6	3.1
	Sub-Total Stittsville	***46.7***	***43.6***	***3.1***	***0.0***	***0.0***	***93.4***	***0.6***	***3.1***
9	416 Business Park	167.6	41.5	118.1	5.4	2.7	24.7	1.6	103.0
15	South Merivale Business Park	98.9	36.6	56.3	3.8	2.1	37.0	0.0	49.1
	Sub-Total South Nepean	***266.5***	***78.1***	***174.4***	***9.2***	***4.8***	***29.3***	***1.6***	***152.1***
16	Riverside South Business Park	240.8	0.0	240.8	0.0	0.0	0.0	0.0	205.3
	Sub-Total Riverside South	***240.8***	***0.0***	***240.8***	***0.0***	***0.0***	***0.0***	***0.0***	***205.3***
17	Albion-Leitrim Industrial Area	136.6	80.1	56.5	0.0	0.0	58.6	0.0	48.7
	Sub-Total Leitrim	***136.6***	***80.1***	***56.5***	***0.0***	***0.0***	***58.6***	***0.0***	***48.7***
34	Youville Business Park	41.2	40.5	0.6	0.0	0.0	98.5	0.0	0.6
35	Ottawa River Business Park	25.4	10.8	8.0	4.5	2.0	42.6	0.0	6.8
36	Taylor Creek Business Park	34.0	29.0	4.9	0.0	0.0	85.5	1.0	4.9
37	Cardinal Creek Business Park	24.6	17.1	6.5	1.0	0.0	69.5	0.0	6.1
38	South Orleans Industrial Park	175.7	45.5	130.0	0.0	0.1	25.9	1.8	111.2
	Sub-Total Orléans	***300.8***	***143.0***	***150.1***	***5.5***	***2.1***	***47.5***	***2.8***	***129.7***
	Total Urban Centres	**1,791.5**	**887.1**	**862.9**	**31.3**	**10.2**	**49.5**	**13.0**	**752.7**
	TOTAL URBAN	**3,969.1**	**2,733.9**	**1,152.5**	**71.9**	**10.9**	**68.9**	**21.6**	**1,009.0**
	RURAL								
	Rural West								
101	A.G. Reed Industrial Area	159.0	79.7	70.7	8.3	0.3	50.1	0.0	61.2
102	Carp Road Corridor Rural Employment Area	726.3	329.9	330.6	65.8	0.2	45.4	1.0	281.0
103	Carp Airport Industrial Area	261.3	159.1	101.0	0.0	1.2	60.9	0.0	88.5
104	Ashton Industrial Area	40.9	10.1	30.4	0.3	0.0	24.6	0.0	26.9
105	Westwood Industrial Area	46.7	20.0	22.0	4.7	0.0	42.9	5.0	19.0
106	Richmond Industrial Area	84.7	17.0	67.7	0.0	0.0	20.0	0.2	58.1
107	Moodie Drive Industrial Area	95.5	79.7	14.8	0.9	0.0	83.5	0.0	12.6
108	Jordel Agri-Industrial Commercial Park	49.7	5.9	39.8	0.0	4.0	11.9	0.0	35.6
	Sub-Total Rural West of Rideau R.	***1,464.1***	***701.4***	***677.1***	***80.1***	***5.6***	***47.9***	***6.2***	***582.8***
	Rural East								
109	South Gloucester Industrial Area	198.2	111.4	40.8	45.5	0.5	56.2	0.0	36.9
110	Gordon McKeown Industrial Area	44.0	32.8	11.1	0.0	0.0	74.7	2.3	11.1
111	Highway 31-South Greely Industrial Area	162.7	60.6	75.0	27.2	0.0	37.2	0.0	67.1
112	IndCum Industrial Area	130.3	33.1	87.3	6.9	3.0	25.4	0.0	78.2
113	Vars Business Park	149.2	68.7	76.7	3.7	0.0	46.1	0.0	66.6
114	Vars Cement	69.5	21.9	0.5	47.1	0.0	31.6	0.0	0.5
	Sub-Total Rural East of Rideau R.	***753.9***	***328.5***	***291.5***	***130.3***	***3.6***	***43.6***	***2.3***	***260.5***
	TOTAL RURAL	**2,218.0**	**1,029.9**	**968.6**	**210.4**	**9.1**	**46.4**	**8.5**	**843.3**
	TOTAL OTTAWA	**6,187.1**	**3,763.7**	**2,121.1**	**282.3**	**20.0**	**60.8**	**30.2**	**1,852.3**

Note: [1] Non-vacant land includes land that is developed, including roads and railways, or constrained by a feature such as a ravine or creek.
[2] Developed land is reported in net hectares and does not include lands developed for rights-of-way or other uses such as storm water ponds.
Net vacant land is derived by applying an 85% percent factor on lots greater than 5.0 ha and some smaller sized lots if they are adjacent to these large lots.
Unless otherwise indicated, all figures are reported in gross ha.

Figure 1 Total Vacant Land 1984 - 2015 (gross ha)



Inside Greenbelt Supply

At the end of 2015, 84.8% of industrial land inside the Greenbelt was already developed. The remaining supply of 256.3 net ha, was concentrated east of the Rideau River. The industrial areas around the Ottawa Macdonald-Cartier International Airport accounted for 142.1 net ha, about 55% of vacant land inside the Greenbelt. The area of these lands have been revised in response to comments from the Airport Authority. The remaining supply in the east was located primarily in the traditional industrial areas of the South-Walkley-Albion and Hawthorne-Stevenage Industrial Areas. (Table 2)

The supply of vacant industrial land west of the Rideau River totaled only 21.5 net ha. Vacant lands were concentrated in the Bells Corners, Colonnade, Merivale and Rideau Heights industrial areas. Once these sites are developed future construction in any of the west-end business parks will be through redevelopment or expansions on existing properties.

Suburban Outside Greenbelt Supply

Vacant industrial land in urban areas outside the Greenbelt represented 753 net ha or about 75% of the total urban supply. The distribution of industrial land was located in three primary areas, West (Kanata-Stittsville 217 net ha), South (South Nepean 152.1 ha, Riverside South 205.3 ha, and Leitrim 48.7 ha) and East (Orléans 129.7 ha). Among the urban centres, the shares of urban land supply were: 22% in Kanata-Stittsville, 15% in South Nepean, 20% in Riverside South, 13% in Orléans, and 5% in Leitrim.

All of the industrial areas outside the Greenbelt had some vacant land, but the Hazeldean, Kanata Town Centre and Youville areas are virtually built-out. In contrast, the majority of land in the Kanata West, 416, Riverside South, Leitrim and South Orléans industrial areas has not been subdivided and accounts for a total of about 574 net ha, 76% of the suburban total.

Rural Supply

After removing newly developed rural industrial lands (8.5 ha), the rural area had a total of 843 vacant net ha. This was 79.1 net ha more than reported at the end of 2013 due primarily to zoning changes in the Carp Road Corridor area, which added several new parcels to the supply.

At the end of 2015, 583 net ha (69%) of vacant rural industrial land were located west of the Rideau River, three-quarters of which was concentrated along Carp Road. East of the Rideau, 260 net ha of vacant industrial space were clustered along Highway 417 east and Bank Street south (formerly Highway 31) (Table 2). 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.

Ownership of Vacant Industrial Land

Table 3 summarizes Ottawa's vacant industrial land supply by ownership. Overall, about 82% (1,520 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 624.6 net ha in suburban areas and 811 net ha in the rural area. The remaining 84.5 net ha of privately owned industrial land is located inside the Greenbelt.

Of the 332.1 net ha owned by public agencies; the Federal Government owns the largest share with 214.1 net ha (64% of public land), the City of Ottawa accounts for 102.2 net ha (31%) and the remaining 16 net ha are owned by the province.

The majority (51.7%) of publicly-owned land in the urban area is located inside the Greenbelt in areas east of the Rideau River. While only 3.8% of the total vacant industrial supply in the rural area is publically owned, 93% of that is owned by the City. A major part of that is intended for a snow disposal facility in the A.G. Reed Industrial Area.

Table 3. Vacant Land in Private and Public Ownership, 2015

Map Ref.	Industrial Area	Vacant Land 2015 net ha	Private Ownership Total Ha	Private Ownership % share	Public Ownership Federal	Provincial	Municipal	Total Ha	% share
	URBAN								
	Inside Greenbelt West of Rideau River								
8	Bells Corners Employment Area	6.6	6.6	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	5.7	5.7	100%	0.0	0.0	0.0	0.0	0%
13	Merivale Industrial Area	4.4	4.4	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	***21.5***	***21.5***	***100%***	***0.0***	***0.0***	***0.0***	***0.0***	***0%***
	Inside Greenbelt East of Rideau River								
18	Rideau North Industrial District	0.0	0.0	-	0.0	0.0	0.0	0.0	-
19	Riverside-Uplands	14.1	6.6	46.8%	0.0	0.0	7.5	7.5	53.2%
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	2.7	0.0	0%	2.7	0.0	0.0	2.7	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	17.7	14.1	80.1%	0.0	0.0	3.5	3.5	19.9%
26	Ottawa South Business Park	6.8	6.8	100.0%	0.0	0.0	0.0	0.0	0.0%
27	Hawthorne-Stevenage Industrial Area	58.4	25.7	44.1%	27.7	0.0	5.0	32.6	55.9%
28	Sheffield Industrial Area	2.0	2.0	100.0%	0.0	0.0	0.0	0.0	0%
29	Newmarket-Cyrville Industrial Area	6.5	6.5	100.0%	0.0	0.0	0.0	0.0	0%
30	Industrial Avenue Business Park	0.0	0.0	-	0.0	0.0	0.0	0.0	-
31	Coventry Industrial Area	0.0	0.0	-	0.0	0.0	0.0	0.0	-
32	National Research Council	0.0	0.0	-	0.0	0.0	0.0	0.0	-
33	Canotek Business Park	1.1	1.1	100.0%	0.0	0.0	0.0	0.0	0.0%
	Sub-Total East of Rideau River	***234.7***	***63.0***	***26.8%***	***155.8***	***0.0***	***16.0***	***171.8***	***73.2%***
	Total Inside Greenbelt	**256.3**	**84.5**	**33.0%**	**155.8**	**0.0**	**16.0**	**171.8**	**67.0%**
	Urban Centres Outside of Greenbelt								
1	Kanata West Business Park	105.5	91.0	86.2%	0.0	13.7	0.8	14.6	13.8%
3	Kanata South Business Park	28.9	28.6	99.0%	0.0	0.0	0.3	0.3	1.0%
4	Terry Fox Business Park	12.7	12.7	100%	0.0	0.0	0.0	0.0	0%
5	Hazeldean Industrial Area	0.0	0.0	-	0.0	0.0	0.0	0.0	-
6	Kanata Town Centre Industrial Area	1.4	1.4	100%	0.0	0.0	0.0	0.0	0%
7	Kanata North Business Park	65.4	65.3	99.9%	0.0	0.0	0.1	0.1	0.1%
	Sub-Total Kanata	***213.9***	***199.0***	***93.0%***	***0.0***	***13.7***	***1.2***	***14.9***	***7.0%***
2	Stittsville Business Park	3.1	3.1	100%	0.0	0.0	0.0	0.0	0%
	Sub-Total Stittsville	***3.1***	***3.1***	***100%***	***0.0***	***0.0***	***0.0***	***0.0***	***0%***
9	416 Business Park	103.0	96.8	93.9%	0.0	0.0	6.3	6.3	6.1%
15	South Merivale Business Park	49.1	49.1	100%	0.0	0.0	0.0	0.0	0%
	Sub-Total South Nepean	***152.1***	***145.9***	***95.9%***	***0.0***	***0.0***	***6.3***	***6.3***	***4.1%***
16	Riverside South Business Park	205.3	133.1	64.8%	58.3	0.0	13.9	72.2	35.2%
	Sub-Total Riverside South	***205.3***	***133.1***	***64.8%***	***58.3***	***0.0***	***13.9***	***72.2***	***35.2%***
17	Albion-Leitrim Industrial Area	48.7	19.6	40.3%	0.0	0.0	29.0	29.0	59.7%
	Sub-Total Leitrim	***48.7***	***19.6***	***40.3%***	***0.0***	***0.0***	***29.0***	***29.0***	***59.7%***
34	Youville Business Park	0.6	0.6	-	0.0	0.0	0.0	0.0	-
35	Ottawa River Business Park	6.8	6.8	100.0%	0.0	0.0	0.0	0.0	0.0%
36	Taylor Creek Business Park	4.9	4.9	98.9%	0.0	0.0	0.1	0.1	1.1%
37	Cardinal Creek Business Park	6.1	3.6	59.6%	0.0	0.0	2.4	2.4	40.4%
38	South Orleans Industrial Park	111.2	108.0	97.2%	0.0	0.0	3.1	3.1	2.8%
	Sub-Total Orléans	***129.7***	***124.0***	***95.6%***	***0.0***	***0.0***	***5.7***	***5.7***	***4.4%***
	Total Urban Centres	**752.7**	**624.6**	**83.0%**	**58.3**	**13.7**	**56.1**	**128.1**	**17.0%**
	TOTAL URBAN	**1,009.0**	**709.1**	**70.3%**	**214.1**	**13.7**	**72.1**	**299.9**	**29.7%**
	RURAL								
	Rural West								
101	A.G Reed Industrial Area	61.2	35.9	58.7%	0.0	0.0	25.3	25.3	41.3%
102	Carp Road Corridor Rural Employment Area	281.0	281.0	100%	0.0	0.0	0.0	0.0	0%
103	Carp Airport Industrial Area	88.5	88.5	100%	0.0	0.0	0.0	0.0	0%
104	Ashton Industrial Area	26.9	26.9	100%	0.0	0.0	0.0	0.0	0%
105	Westwood Industrial Area	19.0	16.9	89.0%	0.0	2.1	0.0	2.1	11.0%
106	Richmond Industrial Area	58.1	58.1	100%	0.0	0.0	0.0	0.0	0%
107	Moodie Drive Industrial Area	12.6	12.6	100%	0.0	0.0	0.0	0.0	0%
108	Jordel Agri-Industrial Commercial Park	35.6	35.6	100%	0.0	0.0	0.0	0.0	0%
	Sub-Total Rural West of Rideau R.	***582.8***	***555.4***	***95.3%***	***0.0***	***2.1***	***25.3***	***27.4***	***4.7%***
	Rural East								
109	South Gloucester Industrial Area	36.9	32.9	89.0%	0.0	0.0	4.0	4.0	11.0%
110	Gordon McKeown Industrial Area	11.1	11.1	100.0%	0.0	0.0	0.0	0.0	0%
111	Highway 31-South Greely Industrial Area	67.1	67.1	100%	0.0	0.0	0.0	0.0	0%
112	IndCum Industrial Area	78.2	77.5	99%	0.0	0.0	0.8	0.8	1%
113	Vars Business Park	66.6	66.6	100%	0.0	0.0	0.0	0.0	0%
114	Vars Cement	0.5	0.5	100%	0.0	0.0	0.0	0.0	0%
	Sub-Total Rural East of Rideau R.	***260.5***	***255.7***	***98.1%***	***0.0***	***0.0***	***4.8***	***4.8***	***1.9%***
	TOTAL RURAL	**843.3**	**811.1**	**96.2%**	**0.0**	**2.1**	**30.1**	**32.2**	**3.8%**
	TOTAL OTTAWA	**1,852.3**	**1,520.2**	**82.1%**	**214.1**	**15.8**	**102.2**	**332.1**	**17.9%**

All Federally-owned (including the National Capital Commission (NCC) 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 102 net ha of vacant industrial land, scattered through all parts of the city. Approximately 16 net ha are located in the southeast inside the Greenbelt and 56 net ha are scattered across suburban industrial areas. Another 30.1 net ha owned by the City in the rural area is located in the A.G. Reed Industrial Area (25.3 ha), South Gloucester Industrial Area (4 ha) and IndCum Industrial Area (0.8 ha). As noted, most of the land at A.G. Reed is planned for a snow disposal facility.

The provincial government owns only 15.8 net ha of vacant industrial land, split between a prime location in the Kanata West Business Park and a small site in the Westwood Industrial Area. Both are owned by the MTO.

Public ownership can influence the manner, timing and availability of how these lands are developed. For example, 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 many 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, and elsewhere.

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 84% 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, some of whom may be associated with development companies.

Servicing

All vacant lands inside the Greenbelt (with the exception of Rideau North) are serviced by both water and sewer trunk services. 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 753 net ha of vacant urban industrial land outside the Greenbelt, almost all (744.2 net ha), is already serviced with both water and sewer trunks. The 8.5 net ha that lack servicing are located in the 416 Business Park.

Development in the rural area is typically on private wells and septic systems. A few industrial areas are partially serviced. These include parts of the A.G. Reed and the South Gloucester area which have piped water and 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 38.6 ha of industrial land were developed on vacant lands in the last two years, made up of 16.1 ha in 2014 and 22.5 ha in 2015. The rate for both years registered well below the 31 year city-wide average of approximately 48 ha per year. Development on expansion lots accounted for 6.2 ha and another 2.4 ha were developed as roads, however, land developed on expansion lands and for roads is not counted as part of the vacant land supply or the consumption rate[2].

A total of 8.7 ha (6.1 ha in 2014, 2.6 ha in 2015) of vacant land was consumed inside the Greenbelt (Table 4). Most of this development occurred in the east, primarily in the Hawthorne-Stevenage and Canotek Business Parks. This level of consumption resulted in a slight decrease in the long-term average annual rate for the inside Greenbelt area from 22.9 ha in 2013 to 21.7 ha at the end of 2015. (Table 5)

[2] Expansion lots and existing road rights-of-way are separately identified in the report maps. Land areas for either use are not included in the reported land supply. Large lots are already netted down by a factor of 15% to take account of future roads and other non-industrial uses on these lots.

Table 4. All Development on Industrial Lands, 2014 and 2015

Map		Development During 2014 and 2015				
		On Vacant Lands (gross ha)			On Other Lands (gross ha)	
Ref	Industrial Area	2014	2015	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	0.0	0.0	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	0.0	1.0	1.0	0.0	0.0
14	Rideau Heights Business Park	0.0	0.0	0.0	0.0	0.0
	Sub-Total West of Rideau River	***0.0***	***1.0***	***1.0***	***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	0.0
20	Hunt Club North Field Aviation Area	0.0	0.0	0.0	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	0.0	0.0	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	1.6	1.6	0.0	0.0
27	Hawthorne-Stevenage Industrial Area	3.2	0.0	3.2	0.0	0.0
28	Sheffield Industrial Area	0.0	0.0	0.0	0.0	0.0
29	Newmarket-Cyrville Industrial Area	0.0	0.0	0.0	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	National Research Council	0.0	0.0	0.0	0.0	0.0
33	Canotek Business Park	2.9	0.0	2.9	0.0	0.0
	Sub-Total East of Rideau River	***6.1***	***1.6***	***7.7***	***0.0***	***0.0***
	Total Inside Greenbelt	**6.1**	**2.6**	**8.7**	**0.0**	**0.0**
	Urban Centres Outside of Greenbelt					
1	Kanata West Business Park	0.0	2.3	2.3	0.0	0.0
3	Kanata South Business Park	0.0	0.0	0.0	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	9.6	9.6	3.1	0.0
	Sub-Total Kanata	***0.0***	***12.0***	***12.0***	***3.1***	***0.0***
2	Stittsville Business Park	0.0	0.6	0.6	0.0	0.0
	Sub-Total Stittsville	***0.0***	***0.6***	***0.6***	***0.0***	***0.0***
9	416 Business Park	0.0	1.6	1.6	0.0	2.4
15	South Merivale Business Park	0.0	0.0	0.0	0.0	0.0
	Sub-Total South Nepean	***0.0***	***1.6***	***1.6***	***0.0***	***2.4***
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	0.0	3.0	3.0	0.0	0.0
	Sub-Total Leitrim	***0.0***	***3.0***	***3.0***	***0.0***	***0.0***
34	Youville Business Park	0.0	0.0	0.0	0.0	0.0
35	Ottawa River Business Park	0.0	0.0	0.0	0.0	0.0
36	Taylor Creek Business Park	1.0	0.6	1.6	0.0	0.0
37	Cardinal Creek Business Park	0.8	0.0	0.8	2.3	0.0
38	South Orleans Industrial Park	1.8	0.0	1.8	0.0	0.0
	Sub-Total Orléans	***3.6***	***0.6***	***4.2***	***2.3***	***0.0***
	Total Urban Centres	**3.6**	**17.8**	**21.4**	**5.4**	**2.4**
	TOTAL URBAN	**9.7**	**20.4**	**30.0**	**5.4**	**2.4**
	RURAL					
	Rural West					
101	A.G. Reed Industrial Area	0.0	0.0	0.0	0.0	0.0
102	Carp Road Corridor Rural Employment Area	0.0	1.0	1.0	0.8	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	5.0	0.0	5.0	0.0	0.0
106	Richmond Industrial Area	0.0	0.2	0.2	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	***5.0***	***1.2***	***6.2***	***0.8***	***0.0***
	Rural East					
109	South Gloucester Industrial Area	0.0	0.0	0.0	0.0	0.0
110	Gordon McKeown Industrial Area	1.4	1.0	2.3	0.0	0.0
111	Highway 31-South Greely Industrial Area	0.0	0.0	0.0	0.0	0.0
112	IndCum Industrial Area	0.0	0.0	0.0	0.0	0.0
113	Vars Business Park	0.0	0.0	0.0	0.0	0.0
114	Vars Cement	0.0	0.0	0.0	0.0	0.0
	Sub-Total Rural East of Rideau River	***1.4***	***1.0***	***2.3***	***0.0***	***0.0***
	TOTAL RURAL	**6.4**	**2.2**	**8.5**	**0.8**	**0.0**
	TOTAL OTTAWA	**16.0**	**22.5**	**38.6**	**6.2**	**2.4**

Table 5. Annual and Average Land Consumption for Industrial Uses, 1985 -2015

Average calculated annually with base year 1985

Year	Urban Inside Greenbelt		Urban Outside Greenbelt		Total Urban		Rural		Total Ottawa	
	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
2012	7.6	23.6	0.9	17.4	8.5	41.1	1.2	10.8	9.7	51.9
2013	1.1	22.9	1.6	16.9	2.7	39.7	2.4	10.5	5.2	50.3
2014	6.1	22.3	2.8	16.4	8.9	38.7	6.4	10.4	15.3	49.1
2015	2.6	21.7	10.2	16.2	12.7	37.9	2.0	10.1	14.9	48.0

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 recent 2 year intervals

2010-11	43.0	21.5	11.3	5.6	54.2	27.1	38.7	19.3	92.9	46.4
2012-13	8.7	2.2	2.5	0.6	11.2	2.8	3.7	0.9	14.9	3.7
2014-15	8.7	2.2	13.0	3.2	21.6	5.4	8.3	2.1	30.2	7.5

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

Over the 2014-15 period a total of 21.4 ha (3.6 ha and 17.8 ha respectively) of suburban industrial land outside the Greenbelt were consumed (Table 4). Much of this land (12.0 ha), was developed in Kanata in the Kanata West and Kanata North Business Parks. Industrial land was also developed in South Nepean in the 416 Business Park (1.6 ha), while 3.0 ha of industrial land was developed in the Leitrim Industrial Area. Three business parks in Orleans had development on industrial land in 2014-15, Taylor Creek (1.6 ha), Cardinal Creek (0.8 ha) and South Orleans (1.8 ha). No industrial land was developed in the Riverside South Business Park. During 2014 and 2015, suburban industrial land consumption decreased slightly, with the 31-year average annual rate dropping from 16.9 ha in 2013 to 16.2 ha by 2015. (Table 5)

The rate of consumption in the rural area continues to fluctuate, rising to 6.4 ha in 2014 from to 2.4 ha in 2013 then dropping to 2.0 ha in 2015. Rural consumption still remains well below the 31-year average of 10 ha. Four of the fourteen rural industrial areas experienced new development in the last two years. More development took place in the rural areas west of the Rideau River. The largest consumption of rural land during 2014-15 took place in Westwood Industrial Area, consuming 5 ha. All of the development in the east (2.3 ha), took place in the Gordon McKeown Industrial Area in Greely.

In 2014-15, 5.2 hectares of expansion land was developed. These expansion parcels were located in Kanata North Business Park, which was developed for an office building, Cardinal Creek Business Park for the expansion of a Park and Ride lot, and in the Carp Road Corridor for the development of two warehouse buildings.

Over the last 31 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 a then all-time low of only 15.9 ha. Since then land consumption rose until 2012-13 where consumption hit new all time lows of 9.7 ha and 5.2 ha respectively. In 2014, consumption rose to 15.3 before dipping slightly to 14.9 ha in 2015. (Table 5)

Figure 2. Annual Industrial Land Consumption, 1985-2015

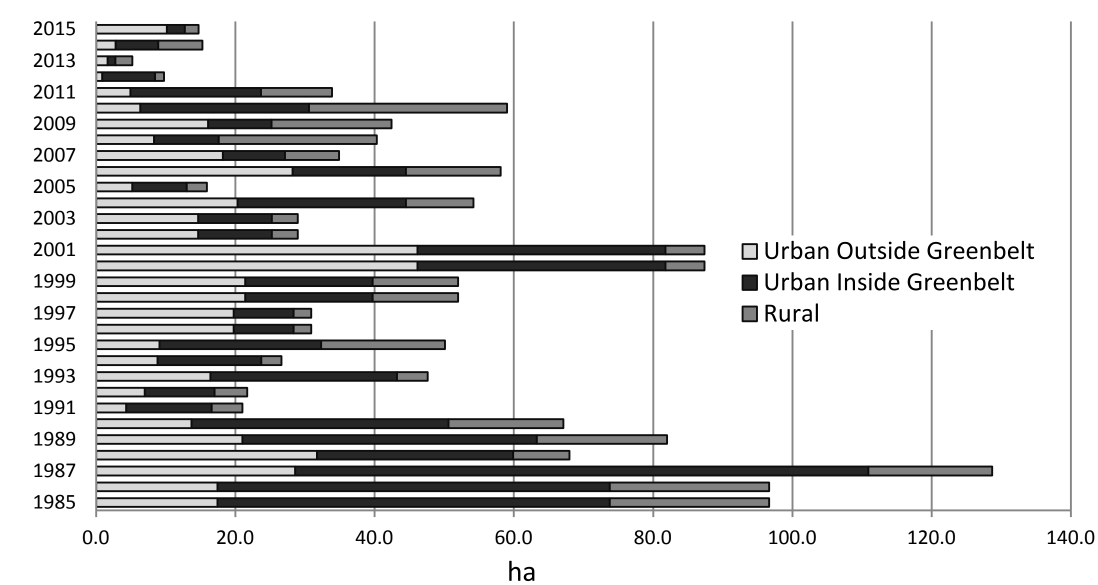
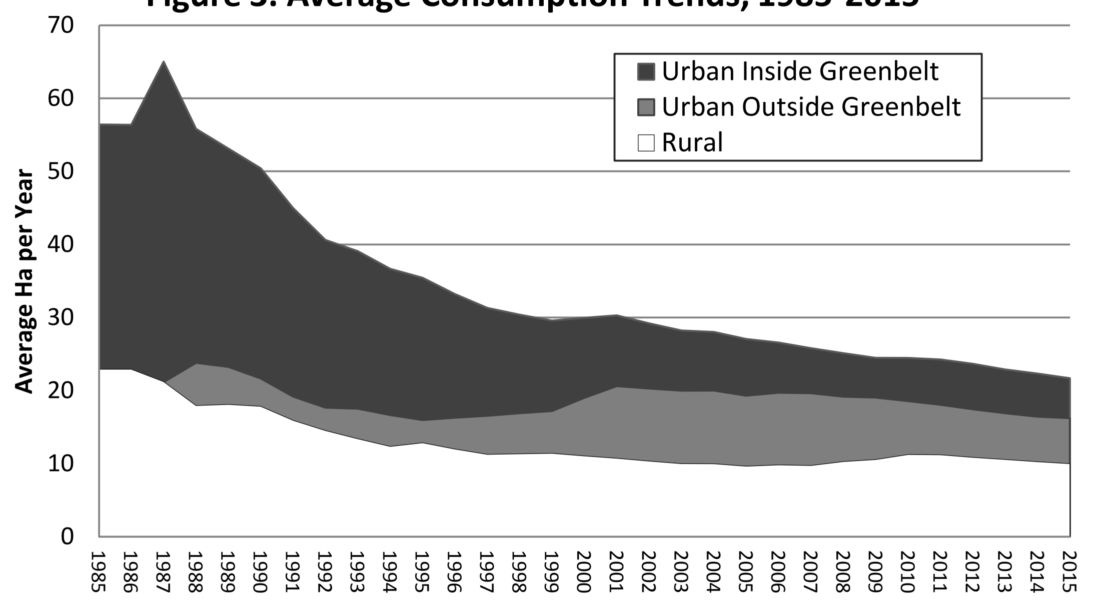


Figure 3. Average Consumption Trends, 1985-2015



Land Consumption Rate

Applying an average consumption rate is one method 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. In 2014-15, the average rate of consumption of industrial land remained steady inside the Greenbelt, increased by 2.6 ha outside the Greenbelt and rose slightly in the rural area (Figure 3).

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 dual 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 when 2.7 ha was developed. In 2012-13, 3.6 ha of industrial land was consumed for non-industrial uses, rising to 7.6 ha in 2014-15. This land was consumed in Taylor Creek Business Park (amusement centre), Cardinal Creek Business Park (expansion of the Trim Road Park and Ride), Albion-Leitrim Industrial Area (recreational facility) and Kanata North Business Park (restaurant and a parking lot).

Figure 4. Consumption of Vacant Urban Industrial Land, 1985-2015 (showing additional consumption for non-industrial uses)

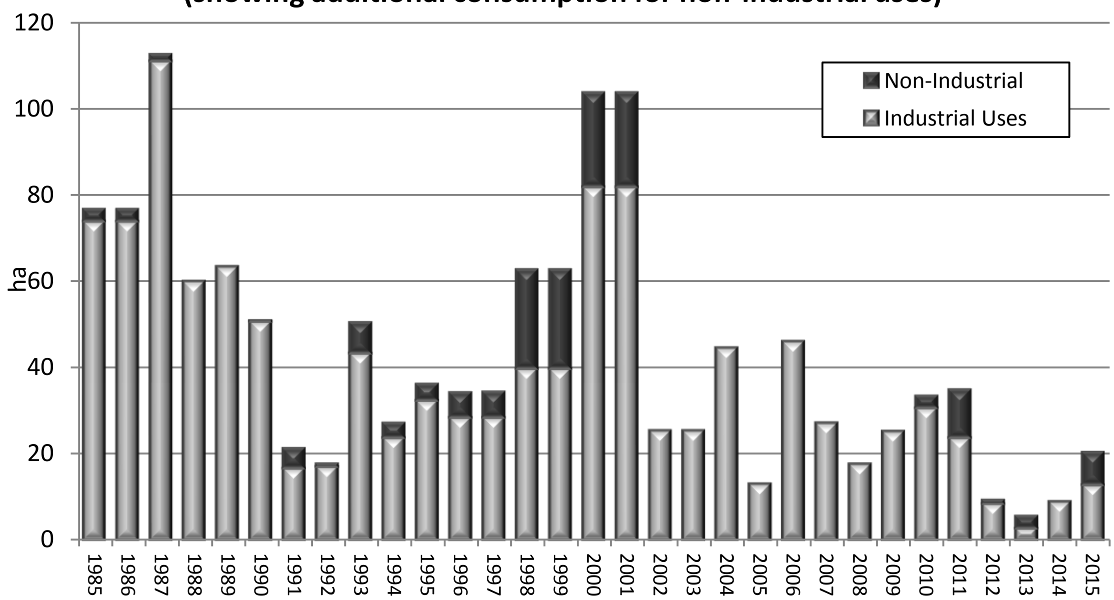


Table 6 and Figures 5 and 6 show annual and running average consumption from 1985 onward. In general, the running average has been declining since 1985 although small peaks can be seen during periods of rapid growth.

During 2014-15, industrial land absorption experienced an increase in the urban area rising to 8.9 ha in 2014 and 12.7 ha in 2015. Overall, average absorption rates continued to fall and hit a new running average low of 37.9 ha per year for industrial (employment) uses only, or 43 ha per year when all uses are included.

After hitting a record low of 1.2 ha in 2012, land absorption in the rural area rose to 6.4 in 2014 and 2.0 in 2015. Running averages continued the decline they began in 2012 falling from 10.6 in 2013 to 10.4 in 2015.

Applying consumption rates over the last 31 years for both urban and rural areas to the vacant supply of 1,009 net ha and 843 net ha respectively, the estimated reserve is approximately 24 years in the urban area, and 81 years in the rural area. Both estimates assume among other things that no new lands will be added or removed from the existing supply.

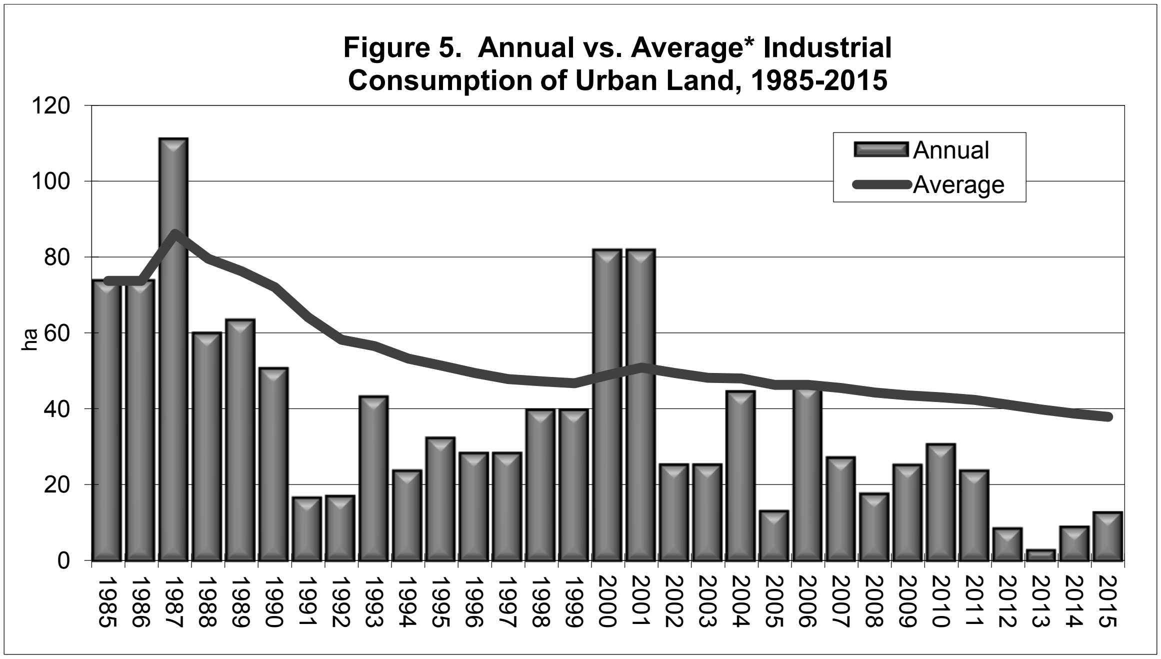
CONCLUSION

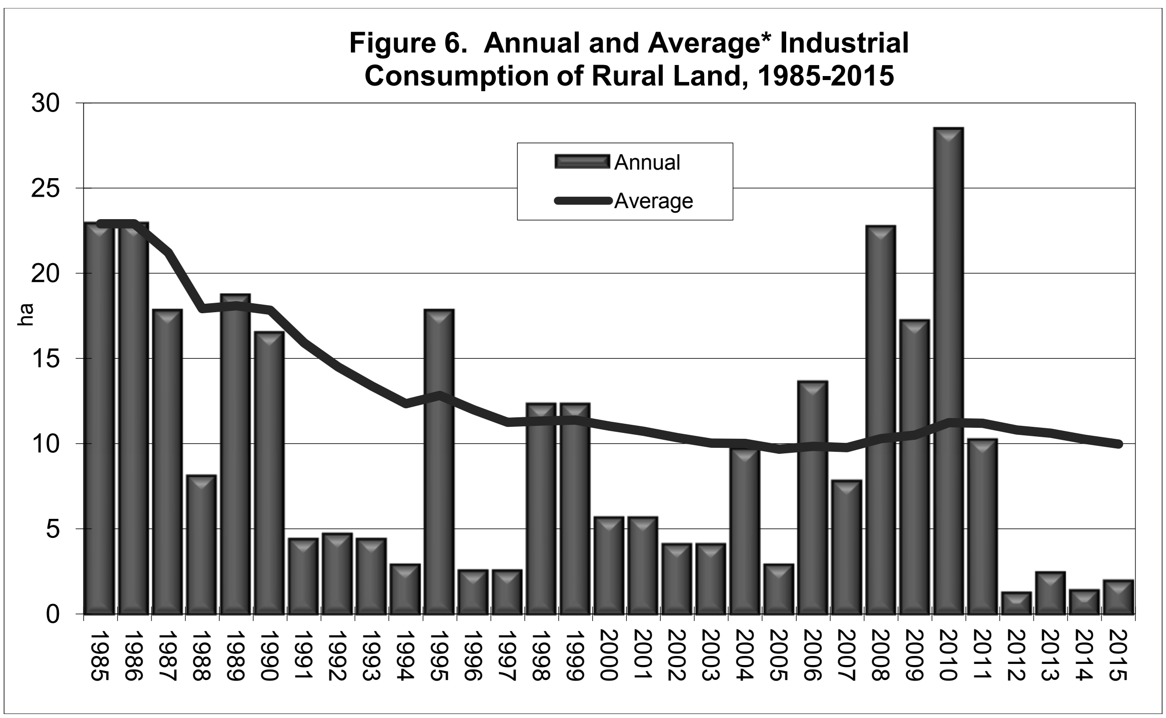
The 2014-15 period was one of restrained consumption of the city's supply of employment land. The supply of vacant industrial land remained steady in both amount and distribution throughout the city. Overall, the supply of vacant industrial land should be more than sufficient to meet demand for beyond the time horizon of the Official Plan.

Table 6. Land Development and Consumption Rates - 1985-2015 (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
2012	28	8.5	9.3	1151.3	1294.4	41.1	46.2	1.2	303.5	10.8
2013	29	2.7	5.5	1154.0	1300.0	39.8	44.8	2.4	306.0	10.6
2014	30	8.9	11.9	1162.9	1311.9	38.8	43.7	6.4	312.3	10.4
2015	31	12.7	20.4	1175.7	1332.3	37.9	43.0	9.6	321.9	10.4

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





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

Appendix

There were 137 hectares of additional industrial lands added to business parks in 2014-15. The majority of this land was in the rural business parks of Carp Road Corridor Rural Employment Area and IndCum Industrial Area as well as Riverside South Business Park located in the suburban area (115.6 ha). These lands were mainly added through zoning modifications to the business park boundaries to reflect current zoning and in the case of Riverside South to match existing boundaries outlined in the Official Plan. Land was also added to Hunt Club North Field Aviation Area, Ottawa South Business Park, Moodie Drive Industrial Park and Vars Business Park. These lands were added through a result of zoning modifications and property line adjustments. A total of 107.6 hectares of industrial lands were lost from business parks between 2014 and 2015 primarily due to changes to be consistent with current zoning. When the development activity on land within the industrial parks is considered, there is an overall loss of 18 net ha of vacant industrial land between 2013 and 2015. Changes are detailed in Table 1A.

Maps and Land Parcels

Maps in this report are at a scale of 1:25,000 except where noted. The location and size of individual parcels are mapped in ArcGIS from the POLARIS parcel fabric database. This provides a high degree of accuracy, and is more precise than techniques available for surveys prior to 2004-05. The parcel fabric is updated regularly, and a single lot depicted in older surveys may not be identical to what is shown in this report even though the lot may look similar.

In the majority of cases, the entire property is removed from the vacant land inventory when the land is developed. Because of the nature of industrial construction, a parcel is considered as developed only when above grade permanent structures are built or being built at the time when fieldwork is done. In cases where the land is primarily intended for outside storage a lot will be considered developed when it is actually being used for its intended long-term purpose.

There are some instances when only a portion of a property parcel is developed. If the remaining part of the parcel is judged to be of a significant size the remaining portion is placed in the "expansion" category. These lots are depicted on the detailed maps but are not counted as part of the overall vacant industrial land supply unless at some point the area is severed and a new lot is created. Any development taking place on expansion lots is not counted as part of the land consumption rate.

Land areas of individual parcels shown in this inventory may be expressed as net or gross hectares. Calculations of overall supply in this report are based on net (ha). Generally, lots greater than five but less than ten ha are categorized as either gross or net based on factors such as; lot configuration and shape, whether it fronts on an existing road that can provide direct access, sizes of neighbouring lots in the area. These lots and those that are ten or more ha in area are converted to net hectares using a standard netting down of 15% (from empirical research on Ottawa industrial land use) to allow for roads and ancillary uses such as stormwater facilities.

In the accompanying map tables, numbers may not add due to rounding.

Table 1A Past and Adjusted Industrial Park and Vacant Lands Areas (gross ha)

Map Ref.		Industrial Park Areas (total ha)			Vacant Land (ha)		
		As reported in Year-end 2013	Adjusted to Start 2014	Difference	*As reported in Year-end 2013*	Adjusted to Start 2014	Difference
	URBAN						
	Inside Greenbelt West of Rideau River						
8	Bells Corners Employment Area	*103.4*	75.6	-27.8	*7.7*	7.6	-0.1
10	Queensview-Morrison Office Park	*32.0*	32.0	0.0	*0.5*	0.5	0.0
11	Woodward Business Park	51.5	51.5	0.0	*0.0*	0.0	0.0
12	Colonnade Business Park	92.3	92.3	0.0	*5.7*	5.7	0.0
13	Merivale Industrial Area	*159.3*	159.3	0.0	*4.4*	4.1	-0.3
14	Rideau Heights Business Park	*101.9*	101.9	0.0	*4.5*	4.5	0.0
	Sub-Total West	***540.4***	**512.6**	**-27.8**	***22.7***	**22.3**	**-0.4**
	Inside Greenbelt East of Rideau River						
18	Rideau North Industrial District	15.8	15.8	0.0	*0.0*	0.0	0.0
19	Riverside-Uplands	18.7	18.7	0.0	*15.5*	15.5	0.0
20	Hunt Club North Field Aviation Area	*71.3*	71.4	0.1	*13.4*	13.4	0.0
21	Limebank North Business Area	*69.7*	69.7	0.0	*46.4*	46.4	0.0
22	Airport South Area	*54.8*	54.8	0.0	*53.4*	53.4	0.0
23	Airport - Lester Sector	*61.6*	61.6	0.0	*2.7*	2.7	0.0
24	Airport Gateway Business Park	*72.9*	72.9	0.0	*33.7*	33.7	0.0
25	South Walkley-Albion Industrial Area	*149.5*	149.5	0.0	*20.2*	20.2	0.0
26	Ottawa South Business Park	*162.4*	165.1	2.7	*6.8*	6.6	-0.3
27	Hawthorne-Stevenage Industrial Area	*313.4*	313.4	0.0	*65.0*	65.0	0.0
28	Sheffield Industrial Area	220.9	220.9	0.0	*2.0*	2.0	0.0
29	Newmarket-Cyrville Industrial Area	150.6	150.6	0.0	*6.5*	6.5	0.0
30	Industrial Avenue Business Park	98.6	86.8	-11.8	*0.0*	0.0	0.0
31	Coventry Industrial Area	12.6	6.5	-6.1	*0.0*	0.0	0.0
32	National Research Council	*159.5*	159.5	0.0	*0.0*	0.0	0.0
33	Canotek Business Park	47.6	47.6	0.0	*1.1*	0.8	-0.4
	Sub-Total East	***1,680.1***	**1,665.0**	**-15.1**	***266.9***	**266.3**	**-0.6**
	Total Inside Greenbelt	***2,220.5***	**2,177.6**	**-42.9**	***289.6***	**288.6**	**-1.0**
	Urban Centres Outside of Greenbelt						
1	Kanata West Business Park	*165.9*	150.7	-15.3	*124.6*	120.1	-4.5
3	Kanata South Business Park	81.3	75.3	-6.0	*30.4*	30.4	0.0
4	Terry Fox Business Park	*72.0*	72.0	0.0	*13.7*	12.4	-1.3
5	Hazeldean Industrial Area	*16.0*	12.0	-4.0	*0.0*	0.0	0.0
6	Kanata Town Centre Industrial Area	*10.8*	10.8	0.0	*1.4*	1.4	0.0
7	Kanata North Business Park	*479.3*	479.3	0.0	*68.9*	67.8	-1.1
	Sub-Total Kanata	***825.3***	**800.1**	**-25.2**	***239.1***	**232.1**	**-6.9**
2	Stittsville Business Park	*47.4*	46.7	-0.7	*3.1*	3.1	0.0
	Sub-Total Stittsville	***47.4***	**46.7**	**-0.7**	***3.1***	**3.1**	**0.0**
9	416 Business Park	167.7	167.6	0.0	*118.1*	117.8	-0.3
15	South Merivale Business Park	98.9	98.9	0.0	*56.3*	56.3	0.0
	Sub-Total South Nepean	***266.5***	**266.5**	**0.0**	***174.4***	**174.1**	**-0.3**
16	Riverside South Business Park	201.4	240.8	39.4	*240.0*	238.8	-1.2
	Sub-Total Riverside South	***201.4***	**240.8**	**39.4**	***240.0***	**238.8**	**-1.2**
17	Albion-Leitrim Industrial Area	*153.9*	136.6	-17.3	*56.5*	56.5	0.0
	Sub-Total Leitrim	***153.9***	**136.6**	**-17.3**	***56.5***	**56.5**	**0.0**
34	Youville Business Park	*41.2*	41.2	0.0	*0.6*	0.6	0.0
35	Ottawa River Business Park	*31.6*	25.4	-6.2	*8.0*	1.8	-6.2
36	Taylor Creek Business Park	*34.0*	34.0	0.0	*4.9*	4.9	0.0
37	Cardinal Creek Business Park	*24.6*	24.6	0.0	*7.3*	4.2	-3.1
38	South Orleans Industrial Park	187.0	175.7	-11.3	*130.0*	130.0	0.0
	Sub-Total Orléans	***318.3***	**300.8**	**-17.5**	***150.9***	**141.7**	**-9.3**
	Total Urban Centres	***1,812.9***	**1,791.5**	**-21.3**	***864.0***	**846.3**	**-17.7**
	TOTAL URBAN	***4,033.4***	**3,969.1**	**-64.3**	***1,153.7***	**1,134.9**	**-18.8**
	RURAL						
	Rural West						
101	A.G Reed Industrial Area	*159.0*	159.0	0.0	*70.7*	70.7	0.0
102	Carp Road Corridor Rural Employment Area	*663.9*	726.3	62.4	*330.6*	329.1	-1.5
103	Carp Airport Industrial Area	*261.3*	261.3	0.0	*101.0*	98.4	-2.6
104	Ashton Industrial Area	40.8	40.9	0.0	*30.4*	30.4	0.0
105	Westwood Industrial Area	47.5	46.7	-0.8	*22.0*	22.0	0.0
106	Richmond Industrial Area	*84.7*	84.7	0.0	*67.9*	67.9	0.0
107	Moodie Drive Industrial Area	94.7	95.5	0.8	*15.1*	15.1	0.0
108	Jordel Agri-Industrial Commercial Park	49.7	49.7	0.0	*39.8*	20.8	-19.0
	Sub-Total Rural West	***1,401.6***	**1,464.1**	**62.5**	***677.6***	**654.5**	**-23.1**
	Rural East						
109	South Gloucester Industrial Area	*189.0*	198.2	9.2	*31.6*	31.6	0.0
110	Gordon McKeown Industrial Area	43.9	44.0	0.0	*11.1*	11.1	0.0
111	Highway 31-South Greely Industrial Area	*162.7*	162.7	0.0	*75.0*	75.0	0.0
112	IndCum Industrial Area	*116.5*	130.3	13.8	*77.7*	77.7	0.0
113	Vars Business Park	*140.5*	149.2	8.6	*76.7*	76.7	0.0
114	Vars Cement	*69.8*	69.5	-0.3	*0.5*	0.5	0.0
	Sub-Total Rural East	***722.5***	**753.9**	**31.4**	***272.7***	**272.6**	**0.0**
	TOTAL RURAL	***2,124.1***	**2,218.0**	**93.9**	***950.3***	**927.1**	**-23.2**
	TOTAL OTTAWA	***6,157.4***	**6,187.1**	**29.7**	***2,104.0***	**2,062.1**	**-41.9**