



West Hants
something inspiring awaits

WEST HANTS REGIONAL MUNICIPALITY
Planning & Heritage Advisory Committee (PAC/HAC)
March 14, 2024 – 6:00pm
Sanford Council Chambers, Zoom / Facebook Live

PRESENT: Tim Carr, Chair (Hantsport Representative)
Mayor Abraham Zebian
Councillor Jim Ivey (District 11)
Jane Davis, Hantsport Representative
Paul Beazley, Windsor Representative
Lisa Bland, WHRM Representative (Three Mile Plains)
Jennifer Nicholls, WHRM Representative (Cheverie)
Tasha Rogers, WHRM Representative (Newport)

STAFF: Sara Poirier, Director of Planning and Development
Mark Fredericks, Senior Planner
Alex Dunphy, Planner
Mark Phillips, CAO
Vanessa Lake, Planning Assistant

PUBLIC: 8 members of the public were present.

REGRETS: Councillor Laurie Murley (District 10)

Call to Order and Attendance

Chair Carr called the meeting to order at 6:00pm. Planning Assistant Lake took attendance. Councillor Murley had sent regrets. All other members of the Committee were present.

Announcements

Chair Carr acknowledged that we are in Mi'kma'ki, the ancestral and unceded territory of the Mi'kmaq People and that this land is governed by the treaties of Peace and Friendship signed in 1726. West Hants Regional Municipality recognizes that we are all treaty people and have responsibilities to this land and each other. West Hants Regional Municipality also recognizes African Nova Scotians are a distinct people whose history, legacies, and contributions have enriched that part of Mi'kma'ki known as Nova Scotia for over 400 years.

Director Poirier announced that Stefan Palios has resigned from the PAC/HAC. Chair Carr thanked Stefan for his dedication and contributions to the Committee. The Windsor resident member position was advertised from February 27 to March 8, 2024. No applications were received. The position will be readvertised in the newspaper on March 19, 2024, with a closing date of April 3, 2024.

Director Poirier also announced that West Hants Regional Municipality is in the process of updating the planning documents to create a regional Municipal Planning Strategy, Land Use By-law, and Subdivision By-law. The Plan Review consultants, WSP, are hosting the first round of public engagement events in March. A public open house will be held at 6:00pm on Wednesday, March 27, 2024, at the Falmouth Community Hall to provide feedback on the draft vision, goals, and objectives for these updated planning documents. Everyone is invited to attend!

Approval of Agenda and Additions

Moved by Lisa Bland and seconded by Councillor Ivey that the agenda be approved as circulated. Motion carried unanimously.

Declaration of Conflicts of Interest

Mayor Zebian declared conflict with item 7.7, File #23-04, and will not participate in the discussion.

Approval of Minutes (February 8, 2024)

Moved by Jane Davis and seconded by Lisa Bland that the minutes be approved as circulated. Motion carried unanimously.

Business Arising From the Public Information Meetings (March 5, 2024)

File #24-04 Development Agreement: 586 O'Brien Street, Windsor (PID 45054350) (Alex Dunphy)

This is an application for a development agreement for 586 O'Brien Street in Windsor to permit a 3-storey building with 6 dwelling units. The Public Information Meeting was held on March 5, 2024, with 6 members of the public in attendance. The comment period is open until March 19, 2024.

File #24-05 WLUB Map Amendment: 523 Albert Street, Windsor (PID 45058872) (Mark Fredericks)

This is an application to rezone the back portion of the property on 523 Albert Street, the August House in Windsor, from Two-Unit Residential (R-2) to General Commercial (GC). The Public Information Meeting was held on March 5, 2024, with 6 members of the public in attendance. The comment period is open until March 19, 2024.

File #23-34 WLUB Map Amendment: 1781 King Street, Windsor (PID 45162005) (Mark Fredericks)

This is an application to rezone 1781 King Street in Windsor from Agriculture (AG) to Two-Unit Residential (R-2) in preparation for future residential development. It is part of the same application as File #24-09. The Public Information Meeting was held on March 5, 2024, with 6 members of the public in attendance. Three members of the public made comments during the meeting about traffic concerns. The comment period remains open until March 19, 2024.

File #24-09 WMPS Amendment and Development Agreement: Irven Drive (PID 45162005 and 45408374) (Mark Fredericks)

This is an application for a development agreement to permit grouped dwellings on PIDs 45162005 and 45408374, on the future extension of Irven Drive in The Crossing community in

Windsor/Garland's Crossing. It is part of the same application as File #23-34. The Public Information Meeting was held on March 5, 2024, with 6 members of the public in attendance. Three members of the public made comments at the meeting regarding traffic and road connections. The comment period remains open until March 19, 2024.

The Committee had concerns about this development's proximity to the Payzant Drive development (#23-04). Mayor Zebian left the meeting at 6:13pm as he found himself in conflict with the discussion. The Committee asked about whether this development would end in a cul-de-sac or if it would connect to Payzant Drive. Planner Fredericks responded that both options are available, and Director Poirier added that the site plan from the Public Information Meeting was not final. More road connections are always preferred, and options are still in discussion with DesignPoint. The extension of Payzant Drive and this development's connection to it were discussed at length. There was concern that the timing of the two applications may affect each other. Planner Fredericks added that Council is considering constructing a connection from Payzant Drive to King Street separate from incoming developments. He explained that the issue with Irven Drive is the criteria that requires "the development to abut a collector road". Mayor Zebian returned to the meeting at 6:16pm.

Business Arising from the Minutes

Update: File #23-02 WMPS and WLUB Amendments: 368 Nesbitt Street, Windsor (Sara Poirier)

This application is a request to amend the Windsor Municipal Planning Strategy and Windsor Land Use By-law to permit a mixed-use, multi-unit development and hockey themed tourist destination on the site of the former Textile Mill. An information report was presented for discussion at the May 11, 2023, PAC/HAC meeting. A Public Information Meeting was held on June 19, 2023. Director Poirier is waiting for responses from inquiries before she can bring a recommendation forward to the Committee.

Update: File #23-16 Affordable Housing Policies (Sara Poirier)

At the October 12, 2023, PAC/HAC meeting Director Poirier provided an information report regarding potential amendments to the planning documents to enable more affordable housing

developments within the Municipality. The Committee made a recommendation requesting staff consider amendments to the planning documents in advance of the plan review.

On Tuesday, March 12, 2024, it was announced that West Hants Regional Municipality was one of the successful recipients of just over \$1M in Housing Accelerator Funding from the Canada Mortgage and Housing Corporation (CMHC). This will be used to assist the Municipality to remove barriers to increase the housing stock. Planner Fredericks has been assigned this portfolio and will be working to get the Housing Action Plan projects implemented. The Municipality is also hiring a Planner on a two-year term to assist the Department with the day-to-day workload.

Update: Industrial Lands (Sara Poirier)

CAO Phillips found the industrial land study that has been previously discussed by the Committee. The study is called the “Hants West Business Park Feasibility Study” which was prepared in 2010 for the Hants Regional Development Authority. The study was sent out to the Committee with the agenda package for any further discussion. The Committee confirmed this was the report they were looking for and thanked staff for providing it. They commented that the study could be updated, but it was valuable information to have, to provide a basis for discussion and to think about the future of the industrial parks.

Update: File #23-43 WHMPS Amendments: Wind Farm Policies (Sara Poirier)

During the PAC/HAC meeting on December 14, 2023, the Committee discussed an application to consider amendments to Section 4.24 of the West Hants Municipal Planning Strategy to further evaluate wind farm development proposals within the Municipality. The Committee discussed possible amendments at length and concluded that they would like to see maps of specific buffer distances from existing dwellings to determine whether any amendments to the wind turbine setback requirements should be considered. The recommendation from the Committee was reviewed and approved by Council on January 23, 2024.

Director Poirier presented the staff report showing buffer distances from 1 to 4 km from residential dwellings at the February 8, 2024, PAC/HAC meeting. The staff report was also presented to Council on February 27, 2024. Council directed staff to “follow the planning process to amend the planning documents to include a 4 km setback.” A Public Information

Meeting for these amendments will be held on April 2, 2024, at 6:00pm in Council Chambers at 76 Morison Drive.

Update: File #23-35 Development Agreement: PID 45058310 and 45058344, Wagner's Court, Windsor (Alex Dunphy)

This application is for a development agreement to permit the conversion of 5 existing single-unit dwellings on Wagner's Court to two-unit dwellings. A Public Hearing was held on February 27, 2024, and Council approved the application at this time. A notice of approval was placed in the paper on March 5, 2024, initiating the 14-day appeal period.

Update: File #23-44 HMPS, HLUB, WHMPS and WHLUB Amendments: Bog Road Boundary Review, Hantsport/Hants Border (Alex Dunphy)

This file is for a mapping amendment to both the Hantsport and West Hants Municipal Planning Strategies and Land Use By-laws to conform to a survey plan which identified the former Town boundary line. Public Hearing was held on February 27, 2024, and Council approved this file at the time. The report was sent to the Department of Municipal Affairs and Housing for Ministerial approval on February 28, 2024.

Update: File #23-04 Development Agreement: PIDs 45053030, 45343878, 45343894, and 45234382, Payzant Drive, Windsor (Alex Dunphy)

Mayor Zebian left the meeting at 6:24pm. This application is for a development agreement to permit a multi-phase residential development consisting of 280 apartment units across 4 multiple-unit apartment buildings and 18 townhouse units grouped on the subject lots on Payzant Drive. First Reading was held on February 27, 2024, and the Public Hearing and Second Reading are scheduled for March 26, 2024. Mayor Zebian returned to the meeting at 6:25pm.

Update: File # 23-29 PID 45218658 Armstrong Lake East Road, Vaughan (Mark Fredericks)

This application was made by the CAO on behalf of Council to rezone the subject property from Open Space (OS) to General Resource (GR) to enable residential development following the future sale of the property. This property was deemed to be surplus land in the 2015 Parks and Open Space Plan. The Public Hearing was held on February 27, 2024, and Council approved this application at this time. A notice of approval was placed in the paper on March 5, 2024, initiating the 14-day appeal period.

Update: File #23-45 WHMPS/WHLUB Amendments to the Hamlet Designation (Mark Fredericks)

This is an application to amend the text of the WHMPS and WHLUB to enable the repurposing of a former church at 20 Musgrave Road in Summerville into five residential units with a shared community space. The text amendments would be general and would affect all former churches within the Rural Residential (R-4) zones and Hamlet designations. First Reading was held on February 27, 2024, and the Public Hearing and Second Reading are scheduled for March 26, 2024.

Update: File #23-33 Development Agreement: PID 45402831 Windsor Back Road, Three Mile Plains (Mark Fredericks)

This application is for a development agreement to permit 87 residential units in 3 multi-unit buildings on a vacant property on Windsor Back Road in Three Mile Plains. The Public Information Meeting was held on November 2, 2023, and several comments from the public were received. Staff continue to work with the applicant on the draft development agreement and hope to bring this file for recommendation at the April PAC/HAC meeting.

Building and Development Activity Reports (February 2024)

The report was circulated with the agenda package. Lisa Bland brought back a question from former member Stefan Palios, about tracking development agreements to completion and if they can be added to this report. Director Poirier replied that this is something that will be addressed with the Housing Accelerator Fund. Staff are looking into how to best share this information on the website. Jim Ivey asked if the number of occupancy permits issued could also be tracked, as this signals that construction is completed.

New Business

File #23-07 Development Agreement: PID 45180635 Hwy 215, Summerville (Mark Fredericks)

Jennifer Nicholls declared conflict with this item and left the meeting at 6:31pm.

This application is a request for a development agreement to permit an outdoor paintball facility on a portion of a property on Highway 215 in Summerville. The application was received in March 2023 and the Public Information Meeting was held on June 6, 2024. This file had been delayed because the subject property was owned by a deceased member of the applicant's

family and the Will had to be probated before it could continue. Ownership has been verified and the application can now continue. The proximity of the Loyal Hill Cemetery is acknowledged and has been considered within the development agreement. Planner Fredericks noted that the applicant has decided to only have the playing field in the wooded area, with the option to expand into the open field included in the development agreement. A 20ft wide vegetation buffer would then be required at the side yards where it abuts the cemetery. The Committee discussed the setback requirements, buffering, and netting for the playing field, all of which are covered within the development agreement. Chair Carr asked if an airhorn will be used to announce the beginning and ending of games. Planner Fredericks replied that this was not specified in the development agreement.

Moved by Lisa Bland and seconded by Tasha Rogers that PAC/HAC recommends that Council give First Reading and hold a Public Hearing to consider entering into a development agreement to permit a paintball facility on PID 45180635 on Highway 215 in Summerville, in a manner substantively the same as the draft set out in Attachment B of the report to the Planning and Heritage Advisory Committee regarding File # 23-07 dated March 14, 2024. Motion carried unanimously.

Moved by Lisa Bland and seconded by Tasha Rogers that PAC/HAC recommends that Council require that the development agreement with Marlene Hill be signed within 120 days from the date of final approval by Council or the date that any appeals have been disposed of; otherwise this approval will be void and obligations arising hereunder shall be at an end. Motion carried unanimously.

Jennifer Nicholls returned to the meeting at 6:45pm.

File #23-41 WHLUB Map Amendment: 4236 Hwy 14, Windsor Forks (Mark Fredericks)

This is an application to rezone 4236 Highway 14 in Windsor Forks from Rural Commercial (RC) to General Resource (GR). The current residents have no intention for any commercial uses on the property. The Public Information Meeting was held on February 6, 2024, and the comment period was open until February 20, 2024. No comments were received.

Moved by Jane Davis and seconded by Lisa Bland that PAC/HAC recommends that Council give First Reading and hold a Public Hearing to consider amending Schedule A of the West Hants Land Use By-law to rezone PID 45329851 at 4236 Highway 14 in Windsor Forks from the Rural

Commercial (RC) zone to the General Resource (GR) zone as shown in the report #23-41 to the Planning and Heritage Advisory Committee dated March 14, 2024.

File #24-01 WHLUB Map Amendment: PID 45045879 Willow Street, Hantsport (Alex Dunphy)

This is an application to rezone PID 45045879 on Willow Street in Hantsport from Single-Unit Residential (R-1) to Multiple-Unit Residential (R-3) to permit up to a 15-unit apartment building based on the zone requirements. The Public Information Meeting was held on February 6, 2024, with 9 members of the public present and 5 giving comments. The comment period was open until February 20, 2024, with 15 written pieces of correspondence and one phone call being received during that time.

During the evaluation of the application, staff discovered an ambiguity in the Minimum Lot Frontage requirement for Apartment Buildings and Grouped Homes in the Multiple Unit Residential (R-3) zone in the Hantsport Land Use By-law. To address this ambiguity, staff suggest replacing the use of the word 'and' with the word 'or' to ensure consistency within the planning documents. Chair Carr asked if this would have any other consequences. Planner Dunphy replied that the intent is to clarify the documents and cause as little impact as possible. The Committee discussed the subject property at length. The slope of the property was a large concern, and the neighbours have already shared concerns about flooding. The Committee noted that the slope would make development difficult, and infill may exacerbate these issues. They also stated that the proposed multi-unit building within a primarily single-unit neighbourhood, particularly in this area and on such a slope, may have a negative impact on the neighbours, especially with stormwater. Consideration by development agreement rather than rezoning the property to allow development as-of-right was also mentioned, as a development agreement must be adhered to, and as-of-right development may take any form permitted by the zone requirements. It was suggested to include the ability to enter into development agreements within Hantsport during the Plan Review. Planner Dunphy explained that the developer does not intent to raise the property to the same level as Willow Street but provide a base layer and have a sloped driveway. This would be addressed in the permitting process. Director Poirier added that whether the Committee is in favour or against the development, the recommendation will still be brought to Council.

Moved by Lisa Bland and seconded by Councillor Ivey that PAC/HAC recommends that Council give First Reading and hold a Public Hearing to consider amending Schedule A of the Hantsport Land Use By-law to rezone PID 45045879 on Willow Street in Hantsport, from the Single Unit Residential (R-1) zone to the Multiple Unit Residential (R-3) zone as shown in the report #24-01 to the Planning and Heritage Advisory Committee dated March 14, 2024. Motion defeated with Mayor Zebian, Councillor Ivey, Tasha Rogers, Jennifer Nicholls, Jane Davis, and Lisa Bland opposed.

Moved by Lisa Bland and seconded by Mayor Zebian that PAC/HAC recommends that Council give First Reading and hold a Public Hearing to consider amending the Hantsport Land Use By-law to clarify the minimum lot frontage requirement for the Multiple Unit Residential (R-3) zone in Section 8.4 in a manner substantively the same as Attachment B of the staff report to the Planning and Heritage Advisory Committee report dated March 14, 2024. Motion carried with Jane Davis and Councillor Ivey opposed.

File #23-39 Windsor MPS/LUB Text Amendment: Pesaquid Comprehensive Development District (Alex Dunphy)

This application was for a text amendment to the Windsor Municipal Planning Strategy and Land Use By-law to allow residential units behind commercial uses on the ground floor of existing buildings in the Pesaquid Comprehensive Development District zone. This item went to First Reading on January 23, 2024, where Council directed staff to prepare an alternative policy to allow the requested use by development agreement. Staff have drafted the policy and brought it back to PAC/HAC for consideration.

Moved by Jane Davis and seconded by Paul Beazley that PAC/HAC recommends that Council give First Reading and hold a Public Hearing to consider amending the Windsor Municipal Planning Strategy and Land Use By-law to consider residential uses behind commercial uses on the ground floor of existing buildings in the Pesaquid Comprehensive Development District (P-CDD) zone by development agreement in a manner substantively the same as Attachment B of the staff report to the Planning and Heritage Advisory Committee report dated March 14, 2024. Motion carried unanimously.

Break

Chair Carr called for a break at 7:56pm. The meeting resumed at 8:09pm.

File #24-06 Non-Substantive Development Agreement Amendment: PID 45059631 Wentworth Road, Windsor (Sara Poirier)

On July 26, 2022, Council approved a development agreement with FH Developments to permit 240 apartment units, 10,000 sq. ft. of commercial space, and townhouse dwellings grouped on PID 45059631 on Wentworth Road in Windsor. An application was received to amend the development agreement to reduce the commercial space by 50% and add three residential units on the ground floor to receive CMHC financing; to consider allowing the commercial space to be converted to residential apartment units if it is unable to be leased within one year of framing; and to consider removing the plaza and revising the site plan to show the driveway closer to Building A, as per the recommendation of a Geotechnical Engineer. These are all considered a non-substantive development agreement amendment. Director Poirier clarified the developer's intent for the revisions. She emphasized that there will be no reduction in recreational space.

In accordance with the original development agreement, construction must begin by September 2024. The Committee had some concerns about the 120 day timeline for the signing of the amended development agreement, but Director Poirier said the developer is anxiously awaiting this amendment and already have their footings permit.

Moved by Lisa Bland and seconded by Mayor Zebian that PAC/HAC recommends that Council approve the non-substantive development agreement amendment on PID 45059631 on Wentworth Road in a manner substantively the same as the draft set out in Attachment B of the report File #24-06 to the Planning and Heritage Advisory Committee dated March 14, 2024. Motion carried unanimously.

Moved by Lisa Bland and seconded by Tasha Rogers that PAC/HAC recommends that Council require that the development agreement amendment with FH Development Group Inc. be signed within 120 days from the date of final approval by Council or the date that any appeals have been disposed of; otherwise this approval will be void and obligations arising hereunder shall be at an end. Motion carried unanimously.

Notices from Adjacent Municipal Units

There were no notices.

Questions and Comments From the Public

Facebook comments are not followed in real time. The public is encouraged to contact staff directly if there are any questions or comments. Six members of the public were present this time.

Tiffany Faulkner, of Hantsport, expressed her concerns about the steepness and flooding issues of the Willow Street property (File #24-01). She provided photos of the property, and of water from the property pooling on her land. She added that former Hantsport Mayor Robbie Zwicker had an engineer look at the property and deemed it unfit for development in 2019. Larry LeCouter, also of Hantsport, shared these concerns and emphasized that the engineers need to see the property when it rains, when the flooding issues are more apparent. He said the pictures shown in the presentation do not accurately portray how steep it is. The cost to prepare this property for development would be remarkably high, and infill may cause further water issues.

Craig Comeau of Three Mile Plains expressed concerns about the Windsor Back Road file (File #23-33). As a former property owner, he has seen first-hand how wet the property can be. He said that the Provincial Department of Public Works said there is only one access to the property, and it is currently used as a driveway for an existing dwelling. He feels a multi-unit apartment building would not fit into the neighbourhood, and sidewalks should be put in place for that number of residents. He added that the new school proposed for the area should also be taken into consideration. Planner Fredericks replied that the school is among the considerations. Planner Fredericks is waiting on feedback from inquiries which would address many of these concerns. The issue about whether it is a “ditch” or a “watercourse” on the property is an ongoing discussion. He is in contact with the provincial Department of Environment regarding the water, the Department of Natural Resources and Renewables regarding potential species at risk, and the Department of Public works regarding road access. Richard Dauphinee, of Three Mile Plains, echoed these concerns. He emphasized that Windsor

is not the only flood zone in the Municipality and that this property is often completely saturated. He mentioned that access to the Windsor Back Road can be dangerous. He does not believe this property is suited for this kind of development.

Next Meeting Date (April 11, 2024) / Adjournment

The next meeting is scheduled for April 11, 2024, at 6:00pm. The Committee and the public will be notified of any changes. Moved by Councillor Ivey and seconded by Mayor Zebian that the meeting be adjourned at 9:01pm. Motion carried unanimously.

PLANNING

ENGINEERING

ECONOMICS

Prepared for:
Hants Regional Development Authority

Project Number: 101204

June 2010



CBCL LIMITED

Consulting Engineers

Hants West Business Park Feasibility Study

Final Report



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Contents

Executive Summary

Chapter 1	Introduction.....	1
1.1	Purpose of this document.....	1
1.2	Background Information.....	2
1.2.1	Municipality of West Hants	2
1.2.2	Town of Windsor.....	2
1.2.3	Town of Hantsport.....	2
Chapter 2	Industrial / Commercial Land Requirements	3
2.1	Demographic Profile and Projections.....	4
2.1.1	Annapolis County Demography.....	5
2.1.2	Kings County Demography.....	6
2.1.3	Hants County Demography.....	7
2.2	Industrial, Commercial, and Institutional Development Projects	8
2.2.1	Current Projects Windsor and West Hants	9
2.3	Employment Projections.....	10
2.3.1	Projected Employment Levels in the Region, 2011 - 2031.....	12
2.3.2	Employment Potentially Located in Business/Industrial Parks, Annapolis Valley Region	14
2.3.3	Employment Potentially Located in Business/Industrial Parks in Hants County.....	14
2.4	Potential Demand for Space in Business/Industrial Parks.....	15
2.4.1	Potential Growth in the Annapolis Valley Region	15
2.4.2	Potential Growth in Building Space in Business/Industrial Parks in Hants County.....	16
2.4.3	Potential Growth in Hectares in Business/Industrial Parks in Kings County	16
2.4.4	Potential Land Demand in Existing Parks in West Hants and a New Industrial/Commercial Park.....	17
2.4.5	Summary of Demand for Land.....	21
Chapter 3	Existing Conditions	23
3.1	Zoning.....	23
3.1.1	West Hants Zoning.....	23
3.1.2	Town of Windsor Zoning.....	23
3.1.3	Hantsport Zoning.....	23
3.2	Land Use.....	23
3.2.1	Town of Windsor.....	23

	3.2.2	West Hants	24
	3.2.3	The Windsor West Hants Joint Industrial Park	25
	3.2.4	Town of Hantsport.....	26
3.3		Infrastructure.....	26
	3.3.1	Transportation	26
	3.3.2	Sewer and Water	27
3.4		Geologic Constraints	28
Chapter 4		Initial Site Selection	30
4.1		Highway Exits.....	30
4.2		Industrial Park Suitability Analysis.....	30
4.3		Potential Industrial Park Sites	32
	4.3.1	Highway Exit 4.....	32
	4.3.2	Highway Exit 5.....	32
	4.3.3	Highway Exit 5A.....	33
	4.3.4	Highway Exit 6.....	34
	4.3.5	Highway Exit 7.....	34
	4.3.6	Highway Exit 8.....	35
Chapter 5		Preferred Site, Development Benefits and Costs.....	36
5.1		Preferred Site	36
	5.1.1	Property Owners and Zoning	36
	5.1.2	Surrounding Land Uses	36
	5.1.3	Existing Services	36
	5.1.4	Access	37
	5.1.5	Phasing.....	37
	5.1.6	Karst Topography.....	37
5.2		Site Development Costs.....	38
5.3		Benefit/Cost Analysis	39
5.4		Summary of Economic and Community Development Impacts.....	44
	5.4.1	Economic Development.....	44
	5.4.2	Summary of Cost and Benefits.....	44
5.5		Potential Challenge.....	45
5.6		Sites for Potential Future Expansion	45
	5.6.1	Highway Exit 5A.....	45
	5.6.2	Highway Exit 5.....	46
Chapter 6		Market Positioning.....	47

6.1	Factors Affecting Business Location Decisions.....	47
6.1.1	Common Factors Affecting Location Decisions.....	47
6.1.2	Policy Factors Affecting Location Decisions.....	49
6.1.3	Local Positioning Factors	52
Chapter 7	Conclusions and Recommendations.....	55
7.1	Conclusions.....	55
7.2	Recommendations and Next Steps Forward.....	56

Appendices

- A Suitability Analysis Component Maps
- B Efforts Made to Collect Commercial / Industrial Land Availability Information and Implications for Economic Growth in the AVR

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Executive Summary

This study was undertaken as a joint project funded by the Municipality of the District of West Hants, the Town of Hantsport and the Town of Windsor to determine the feasibility of a joint industrial / business park expansion or the development of a new industrial / business park in Hants West. It:

- examines the market potential of a joint business park expansion or the development of a new joint business park in the region;
- investigates possible sites and site considerations for a joint business park expansion or new joint business park development; and
- provides a framework of actionable items, to move forward with a joint business park development.

Despite significant effort, it was not possible to find sufficient information on available land, acres occupied or absorption rates at existing business parks in the Annapolis Valley Region. This is a tremendous shortcoming, as potential purchasers would not expend the level of effort required to find out about land and would move on to other areas. This also makes projections of demand more difficult.

Based on statistical analyses of economic conditions since 1988, there appears to be moderate demand for industrial and commercial land in the area. However, the projections can be highly influenced if the Client Group engages in active marketing and sell of land, and if additional demand occurs as a result of the extension of the divided highway to Windsor.

In the absence of public sector subsidies, the selling price of prepared industrial/commercial land will need to be high, if the client group wishes to achieve simple payback on the cost of land, site development, and marketing/selling costs. The land price can be lower if the client group is willing to allow property tax revenue generated within the park to be applied to its operations. Assuming the land in the park expansion's asking price is similar to the NSBI asking price at the Windsor-West Hants Industrial Park (about \$50,000 per ha) the Client Group will earn about \$314,624 in net municipal financial benefits over the next 22 years.

The preferred site for the development of additional industrial / business park land is located in the Town of Windsor, adjacent to Exhibition Park and is bounded by Wentworth Road, Centennial Drive, and Tregothic Drive (see Figure E.1 [5.3 in report]). A number of factors have influenced the decision to choose this area as the preferred development site:

- the current landowner is apparently willing to sell a portion of their land;
- the low development cost due to existing services in the area; and
- the benefit of a logical expansion of the existing Windsor Industrial Park.

While this site cannot fully accommodate the land demand projected by the high growth scenario (13.9 ha until 2031), it can satisfy almost all of the 7.3 ha land demand projected by the mid-growth scenario until 2031). Both of these demand estimates assume that the 3.9 ha vacant in the Windsor-West Hants Industrial Park will be sold before the Windsor Industrial Park is expanded. If a high growth scenario is

achieved additional land will need to be brought on stream. Possible sites for this expansion are described in Section 5.3.

The opportunities uncovered in this study depend on a cooperative approach among the Town of Hantsport, Town of Windsor and the Municipality of the District of West Hants. None of the three has all the resources (land and financial) or location attributes to undertake an appropriately aggressive development, marketing and selling plan.

Recommendations and Next Steps Forward

- The client group should enter into negotiations with the Windsor Agricultural Centre to purchase lands that front on Centennial Drive and Tregothic Drive;
- The client group should undertake the environmental study required under Policy 12.0.2 of the Town of Windsor Municipal Planning Strategy to describe the susceptibility of flooding, drainage problems, and the bearing capacity and suitability for construction of soils at the site, and will identify suitable construction methods, including flood proofing measures, to overcome the constraints which are found to exist at the site;
- Based on the results of the study and if a suitable price can be negotiated, the Client Group should acquire the lands from the Windsor Agricultural Centre;
- The zoning of the area should be changed from FG: Fairground to LI-1: Light Industrial to match existing zoning in the area;
- The client group must establish a formal marketing and selling function that targets the Windsor Industrial Park and the Windsor-West Hants Industrial Park. The function should be controlled by the Town of Windsor, the Town of Hantsport, and the Municipality of the District of West Hants. This study provides a notional budget of \$37,500 per year (2009\$) for this function. It should be established immediately to take advantage of the vacuum of marketing and selling functions among Annapolis Valley Region parks and thus raise the sales rate of the Windsor and Windsor-West Hants parks;
- The Town of Windsor, Town of Hantsport and Municipality of West Hants need to enter into negotiations to share the costs and benefits that stem from the park(s) expansion(s);
- In the meantime, the Client Group should continue negotiations to acquire or encourage the industrial development of potential expansion sites around Exits 5A and 5;
- The client group should continue to support the private development efforts occurring at Exit 5; and
- Pricing for the land in the park expansion should naturally take into consideration local market conditions, as well as the willingness of the Client Group to accept risk. Therefore we suggest as a starting point that asking land prices in the expansion be close to the current NSBI \$50,000 per ha (about \$20,000 per acre) asking price for land in the Windsor West Hants Industrial Park.

Chapter 1 **Introduction**

1.1 **Purpose of this document**

This study was undertaken as a joint project funded by the Municipality of West Hants, the Town of Hantsport and the Town of Windsor, to determine the feasibility of a joint industrial / business park expansion or the development of a new industrial / business park in Hants West. It:

- examines the market potential of a joint business park expansion or the development of a new joint business park in the region;
- investigates possible sites and site considerations for an expanded or new park;
- provides recommendations on market positioning; and
- provides a framework of actionable items, to move forward with a joint business park development.



Figure 1.1: Municipal Boundaries

1.2 Background Information

The area included in this study is comprised of three municipalities, the Municipality of the District of West Hants, the Town of Windsor and the Town of Hantsport.

1.2.1 Municipality of West Hants

The Municipality of the District of West Hants is a primarily rural municipality bordered by the municipalities of East Hants, Kings, Chester, Halifax Regional and the Town of Hantsport. Development is concentrated around the Town of Windsor in Three Mile Plains and Falmouth, and in communities near Highway 101.

1.2.2 Town of Windsor

The Town of Windsor is located in the centre of the District of West Hants where the Avon and St. Croix Rivers meet and empty into the Minas Basin. The community act as a regional services centre for the area.

1.2.3 Town of Hantsport

The Town of Hantsport encompasses approximately 2.6 km² (1 mile²) within Hants County. The Town has developed and remains primarily an industrial-residential area and therefore continues to play an important role in the economic well-being of West Hants and Kings Counties.¹

¹ community – Town of Hantsport, accessed from the world wide web on 19 February 2010 at <http://www.hantsportnovascotia.com/community/>.

Chapter 2 Industrial / Commercial Land Requirements

Figure 2.1 provides an overview of the size and location of Annapolis, Kings and Hants Census Divisions in Nova Scotia (NS), herein after referred to as the Annapolis Valley Region (AVR). The population and private dwelling counts are derived from the 2006 Census. Throughout this overview and the projections, we examine the three counties because they are closely tied by geography and economic and social structures.

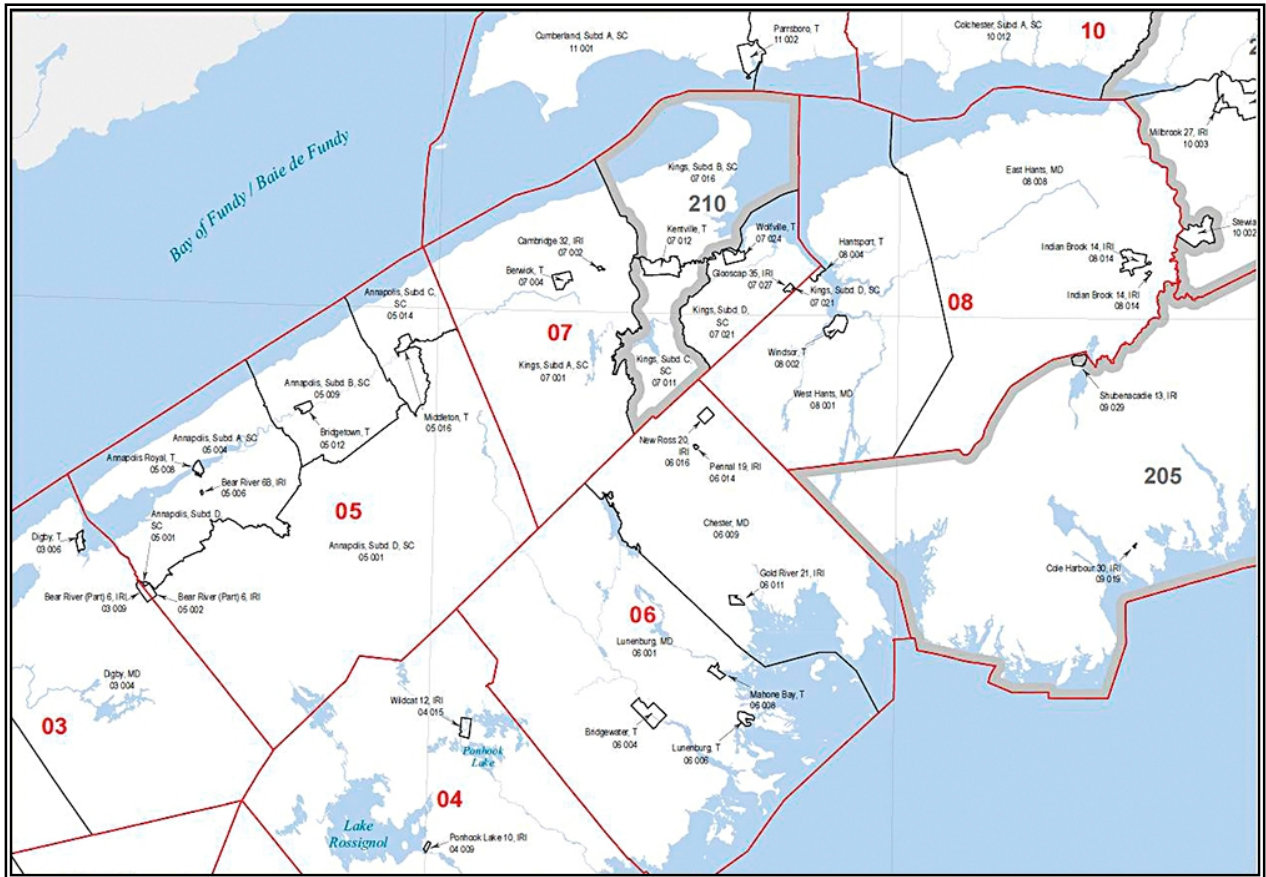


Figure 2.1: Annapolis, Kings and Hants Census Divisions' Location (1:800,000)

The 2006 population and dwelling counts in 2006 were as follows:

- Annapolis County (Census Division 05), population 21,438 11,038 private dwellings;
- Kings County (Census Division 07), population 60,035, 27,177 private dwellings; and
- Hants County (Census Division 08), population 41,182, private dwellings 17,277; of which;
 - West Hants² had a 2006 population of 18,781 and 8,188 private dwellings; and
 - East Hants³ had a population of 22,401 and 9,089 private dwellings.

² West Hants includes the Municipality of the District of West Hants, the Town of Windsor and Village of Hantsport.

³ East Hants includes the Municipality of the District of East Hants and the Indian Brook Indian Reserve.

2.1 Demographic Profile and Projections

Nova Scotia. The province's population has grown by only 1.5% since 1991, to stand at about 913,465 in 2006. The combination of declining fertility rates and negative net migration has also shifted upward the age profile of the province.

Estimates for 2006 indicate that NS, among the provinces and territories, has the highest proportion of its population aged 65 years and older, at 14.6%.⁴

Despite NS having the highest percentage of population aged 65 and older, it is Newfoundland and Labrador (NL) that has the oldest population of the provinces and territories, with a median age of 41.3 years. Between 2001 and 2006, the NL median rose by 3.2 years, the fastest increase in the country. However, NS was close behind with a median age of 41.0 years and an increase in its median age of 2.5 years between 2001 and 2006.⁵

The following pages focus on the demography of the Annapolis, Kings and Hants Counties and make references to the overall demographic conditions in NS.

The following figures describe the population of the three counties from 1991 to 2006 and provide projection to 2031.

In 2006, the population of the Annapolis Valley Region stood at 122,655 and accounted for 13.4% of the NS population. The projections indicate that Valley Region's population could decline marginally to about 116,006 by 2031, at which point it would account for about 12.9% of the NS population.

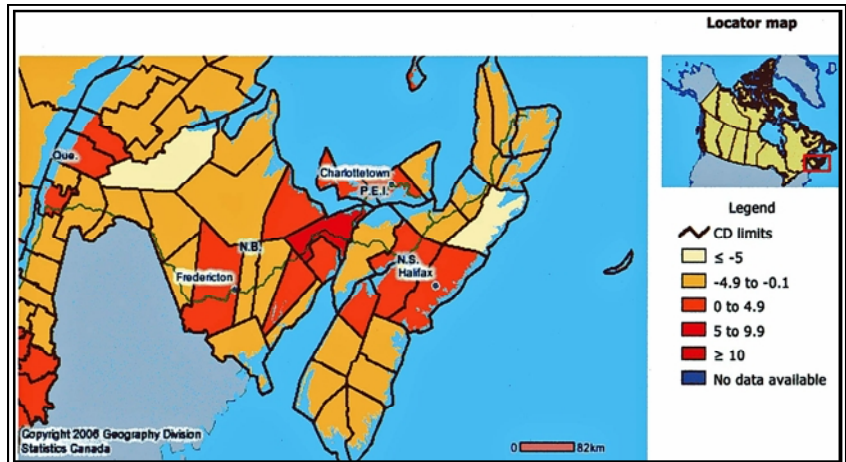


Figure 2.2: Maritime Canada Population Change

Figure 2.2 shows that the rural areas of the Nova Scotia (NS) and the rest of the Maritimes suffered from population decline between 2001 and 2006. However, Kings and Hants Counties showed population growth from 2001 to 2006. Population growth from 2001 to 2006 was centred on Census Metropolitan Areas (CMAs) and Census Agglomeration Areas (CAA).

⁴ "Canada's Population by Age and Sex", The Daily, Statistics Canada's Thursday, October 26, 2006.

⁵ Ibid.

2.1.1 Annapolis County Demography

In 2006, the population of Annapolis County was 21,438 and accounted for 2.3% of the NS population. The projections indicate that Annapolis County's population could decline marginally to about 18,926 by 2031, at which point it would account for about 2.1% of the NS population.

2.1.1.1 POPULATION AGE STRUCTURE (ANNAPOLIS)

Figure 2.3 provides an overview of the past and projected population of Annapolis County, and the relative contribution of selected age groups to the total population.

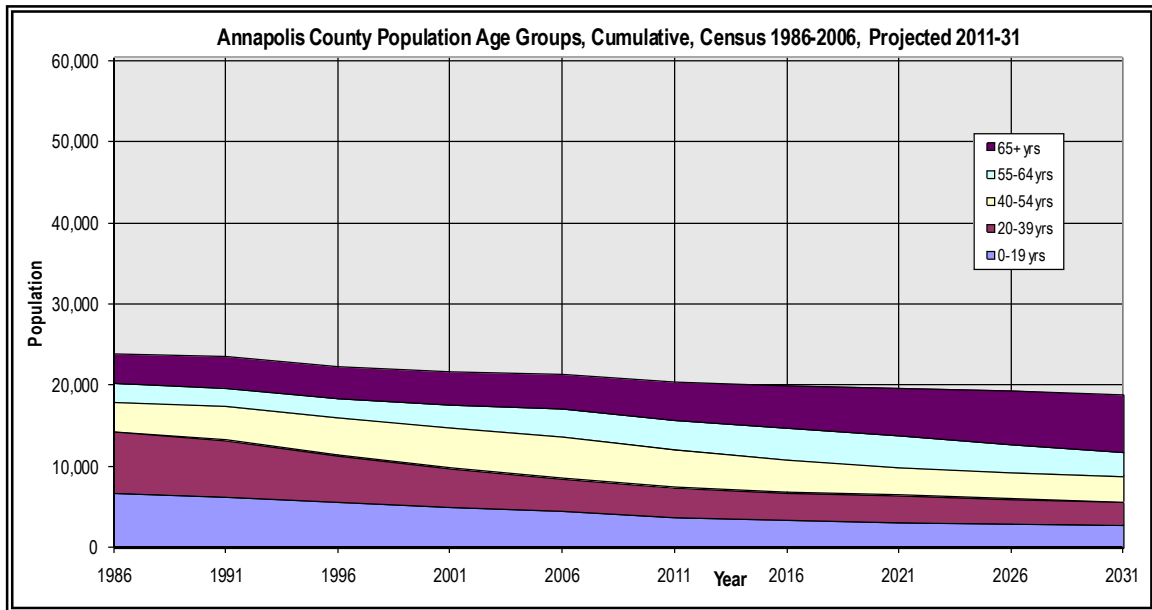


Figure 2.3: Annapolis County Population Age Groups

AGE 65 PLUS (ANNAPOLIS)

In 2006, about 20.1% of the population of Annapolis County was aged 65 years and older. In the Rest of Nova Scotia (RoNS), about 15.7% of the population was aged 65 years and older. However, just like the RoNS, projections indicate that the proportion of population aged 65 years and older will increase in Annapolis County. Information from recent projections provided by the NS Department of Finance indicates that the proportion of population aged 65 and over in Annapolis County could rise to about 37.8% by 2031 compared to 28.1% for the RoNS.

AGE 20 TO 64 (ANNAPOLIS)

In 2006, in terms of the prime working age group aged 20 to 64 years, about 58.8% of the population of Annapolis County was in their prime working years, compared to 64.9% for the RoNS. By 2031, about 47.1% of Annapolis County's population will be from 20 to 64 years old (vs. 54.6% in the RoNS).

AGE 0 TO 19 (ANNAPOLIS)

In 2006, about 21.2% of the population of Annapolis County was 19 years of age or younger. In the RoNS, about 23.8% of the population was aged 19 years or younger. By 2031, about 15.1% of Annapolis County's population will be from 0 to 19 years old (vs. 17.3% for RoNS).

2.1.2 Kings County Demography

In 2006, the population of Kings County was 60,035 and accounted for 6.6% of the NS population. The projections indicate that its population could decline marginally to about 57,914 by 2031, at which point it would account for approximately 6.4% of the NS population.

2.1.2.1 POPULATION AGE STRUCTURE (KINGS)

Figure 2.4 provides an overview of the past and projected population of Kings County, and the relative contribution of selected age groups to the total population.

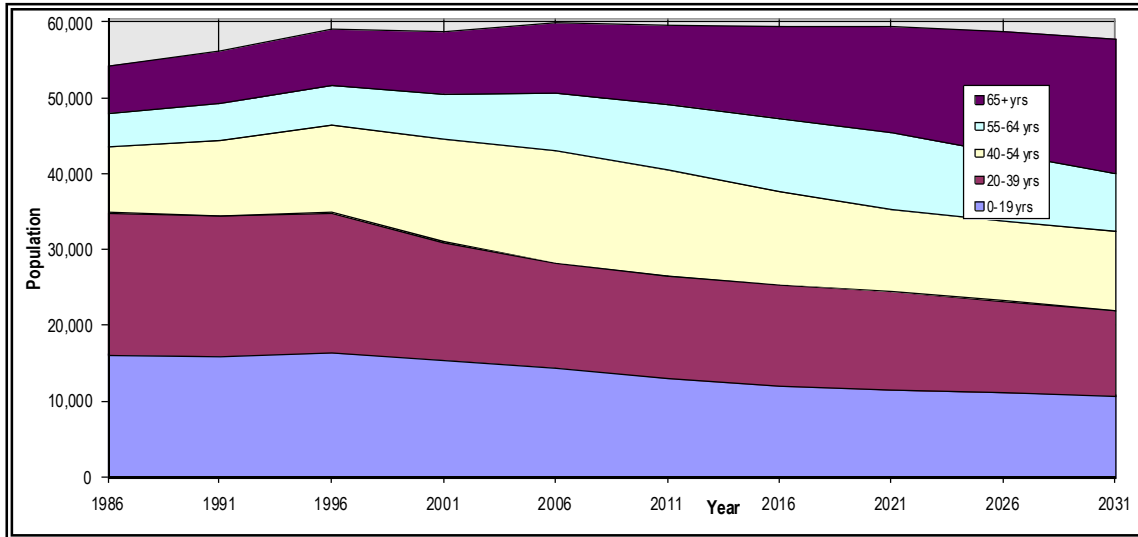


Figure 2.4: Kings County Population Age Groups, Cumulative Census 1986-2006. Projected 2011-31

AGE 65 PLUS (KINGS)

In 2006, about 15.5% of the population of Kings County was aged 65 years and older. In the RoNS, about 15.1% of the population was aged 65 years and older. However, just like the RoNS, projections indicate that the proportion of population aged 65 years and older will increase in Kings County. Information from recent projections provided by the NS Department of Finance indicates that the proportion of population aged 65 and over in Kings County could rise to about 30.8% by 2031, compared to 28.2% for the RoNS.

AGE 20 TO 64 (KINGS)

In terms of the prime working age group, aged 20 to 64 years, about 60.2% of the population of Kings County was in their prime working years, compared to 62.2% for the RoNS. The difference in the proportion of persons in their core working years accounts for a substantial portion of the lower household incomes in Kings County compared to, for example, the Halifax Regional Municipality. By 2031, about 50.6% of Kings County's population will be from 20 to 64 years old (vs. 54.7% in the RoNS).

AGE 0 TO 19 (KINGS)

In 2006, about 24.3% of the population of Kings County was 19 years of age or younger. In the RoNS, about 22.6% of the population was aged 19 years or younger.

By 2031, about 18.7% of Kings County’s population will be from 19 years old or younger (vs. 17.1% for the RoNS).

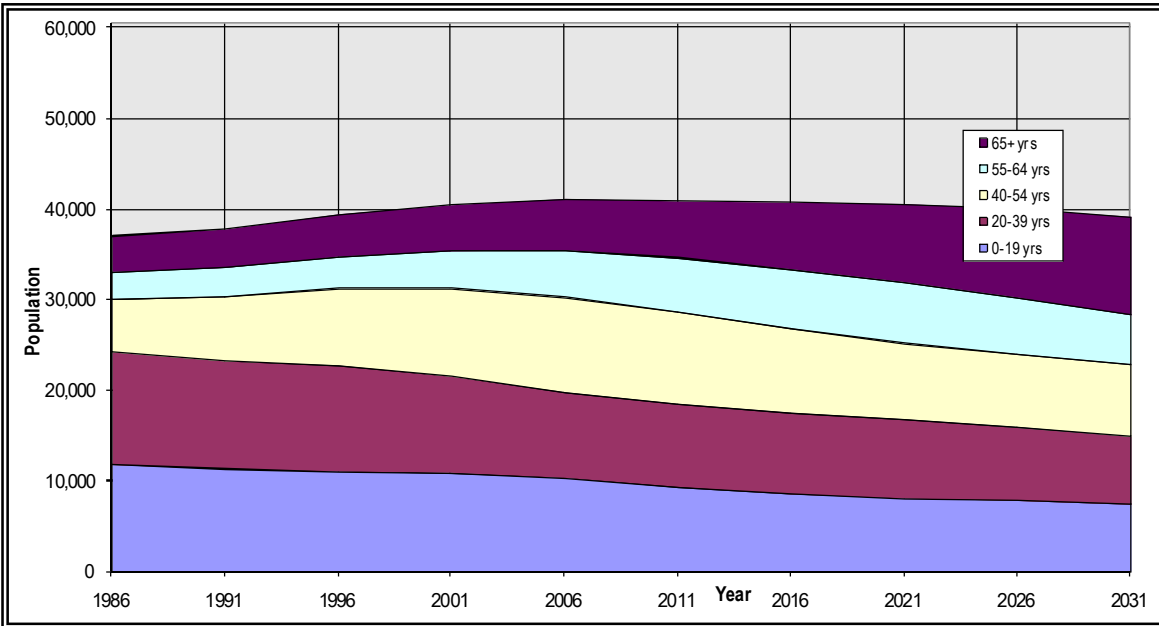


Figure 2.5: Hants County Population Age Groups, Cumulative, Census 1986-2006, Projected 2011-31

2.1.3 Hants County Demography

In 2006, the population of Hants County was 41,182 and accounted for 4.5% of the NS population. The projections indicate that Hants County’s population could decline marginally to about 39,167 by 2031, at which point it would account for about 4.4% of the NS population.

2.1.3.1 POPULATION AGE STRUCTURE (HANTS)

Figure 2.5 provides an overview of the past and projected population of Hants County and the relative contribution of selected age groups to the total.

AGE 65 PLUS (HANTS)

In 2006, about 13.8% of the population of Hants County was aged 65 years and older. In the RoNS, about 27.6% of the population was aged 65 years and older. Projections indicate that the proportion of population aged 65 years and older will increase in Hants County. Information from recent projections provided by the NS Department of Finance indicates that the proportion of population aged 65 and over in Hants County could rise to about 27.6% by 2031, compared to 28.4% for the RoNS.

AGE 20 TO 64 (HANTS)

In 2006, the prime working age group, aged 20 to 64 years, about 60.9% of the population of Hants County was in their prime working years, compared to 62.2% for the RoNS. By 2031, about 53.1% of Hants County’s population will be from 20 to 64 years old (vs. 54.5% in the RoNS).

AGE 0 TO 19 (HANTS)

In 2006, about 25.4% of the population of Hants County was 19 years of age or younger. In the RoNS, about 22.6% of the population was aged 19 years or younger. By 2031, about 19.3% of Hants County's population will be from 19 years old or younger (vs. 17.1% for the RoNS).

2.2 Industrial, Commercial, and Institutional Development Projects

Figure 2.6a provides an overview of the annual value of industrial, commercial, institutional (ICI) and agricultural building permits from 1992 to 2009. Given the relatively small number and the range of values of the permits, a three year average (Figure 2.6b) smoothes out the annual discontinuities and reveals a significant upward trend in after-inflation value over the last 18 years. Regression analyses indicate that the trend in real growth in the value of ICI permits is about 9.0% per year.

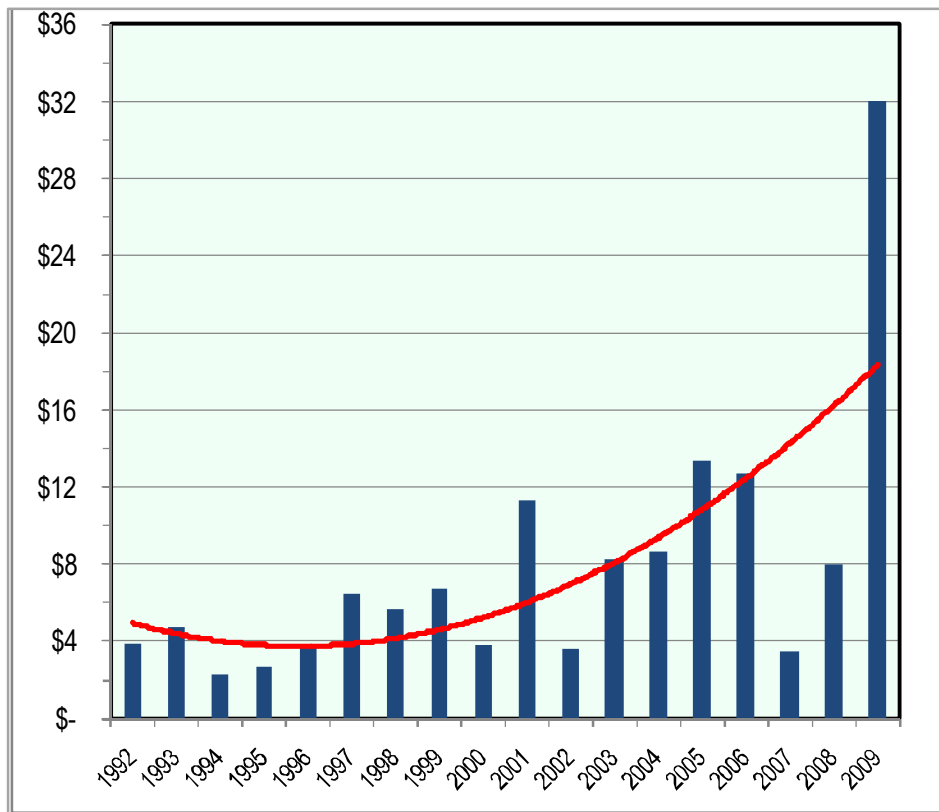


Figure 2.6a: ICI Building Permit Value (million 2009\$) Municipality of West Hants and Town of Windsor. Sources: Windsor-West Hants Joint Planning Advisory Committee and Jozsa Management and Economics

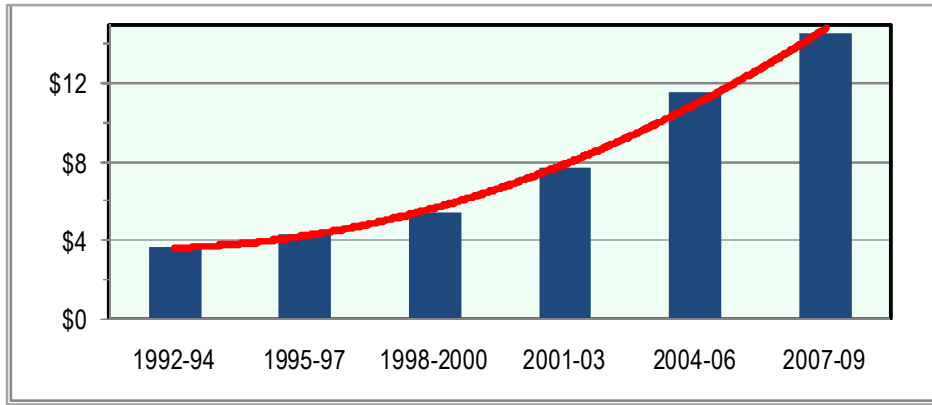


Figure 2.6b: ICI Building Permit Value (millions 2009\$, 3 Yr. Ave.)
Municipality of West Hants and Town of Windsor. Sources: Windsor-West Hants Joint Planning Advisory Committee & Jozsa Management & Economics

2.2.1 Current Projects Windsor and West Hants

Table 2.1 shows the ICI and agricultural building permits issued by the Town of Windsor and the Municipality of the District of West Hants from 2005 to early February 2010.⁶ The data was provided by the Windsor-West Hants Joint Planning Advisory Committee.

As evidenced in the employment profile of the Valley Region and the labour force by industry data for the census sub-division of West Hants, the majority of the investment has been in the commercial and institutional sectors.

⁶ RESIDENTIAL

Cottage Country: 118-unit bare land condominium development (currently under construction) previous projects: Canyon Point 59-unit bare land condo development (completed 2009); conventional subdivision and development of Chateau Village, Chalet Hamlet and Falls Lake West.

Anahid Investments (Armco Communities): approx. 30 single and two-unit lots approved in 2006; Phase 3 not yet submitted for approval.

Brison Developments: The Crossing Mini-home Park, Garlands Crossing, 220 units (under construction); Bailey Drive, Garlands Crossing, 16 single unit lots (under construction); Halewood Dr., Falmouth (58 single unit lots, approx 25 not developed) previous projects include: Mountain View Park subdivision, Falmouth.

Table 2.1: Current Projects: Town of Windsor and Municipality of the District of West Hants

<p>LARGE COMMERCIAL/INDUSTRIAL (PERMITS >\$150,000)¹</p> <p><u>WINDSOR</u></p> <p>Armstrong's Auto Sales: new construction, \$235,000 (2006)</p> <p>Lawton's Drugs: addition and interior renovations, \$629,000 (two permits 2006)</p> <p>Subway Restaurant: new construction \$220,000 (2006)</p> <p>Mill Island: mixed commercial/residential, renovation of former NS Textiles Mill, Windsor, \$2.2 million (three permits 2008).</p> <p>Vaughan's Market & Petro-Can Gas Bar: new construction and renovations, \$1 .0 million (2006 and 2009)</p> <p>Hants Equipment: New construction for heavy equipment sales & service business, \$290,000 (2009).</p> <p>Crombie Developments: Fort Edward Mall, interior renovations, \$593,000 (two permits 2009)</p> <p><u>WEST HANTS</u></p> <p>KJC Development: new construction medical/dental offices, \$200,000 (2005)</p> <p>Super 8 Motel (Pacrim): new construction \$3.0 million (2006)</p> <p>Sustainable Fish Farming Ltd.: new construction, \$750,000 (two permits 2007)</p> <p>Sepracor Canada: renovations and additions, \$5.5 million (four permits 2005, 2006, 2008)</p> <p>Orion Electronics (now Cobham Tracking): addition and renovations, \$570,000 (two permits, 2006 and 2008)</p> <p>Nova Ski Ltd.: accessory buildings for ski operation, \$300,000 (two permits 2008 & 2009)</p> <p>Windsor Home Hardware: Interior renovation at Ft Edward Mall location, \$300,000 (2010).</p> <p>OTHER COMMERCIAL / INDUSTRIAL & MIXED USE</p> <p>Asset Management Ltd.: commercial / residential (four apartments), Development Agreement approved; not yet under construction.</p> <p>Clark Wilkins: mixed commercial / residential, ground floor commercial in one apartment building and a second apartment building (66 units total), Development Agreement in application stage.</p> <p>Brison Developments: mixed commercial / residential, four commercial lots and 15 single and two-unit residential lots, subdivision application by proponent in progress.</p>

As evidenced in the employment profile of the Valley Region and the labour force by industry data for the census sub-division of West Hants, the majority of the investment has been in the commercial and institutional sectors.

2.3 Employment Projections

Table 2.2 provides an overview of annual average employment by industry in the Annapolis Valley Region from 1988 to 2009, and for January 2010. Figure 2.8 shows annual historical and projected annual average employment levels by major industry group.

The projections stem from regression analyses weighted to give more recent years greater influence over the trends described by the regressions. The logic is as follows:

- Other things equal, the longer a data history the better, in terms of assessing trends. However, our data series extends back 24 years. Since the early years, there have been significant changes in the structure of the Valley and overall NS economies and in economies outside NS. In addition, there have been substantial improvements and innovations in communications and land transportation that affected the economic structure of the Valley Region as its relationship to the overall NS economy;

- Future changes in the Valley Economy are more likely hinted at in the more recent trends in employment growth;
- Standard regression analysis gives equal weight to each data point; and
- By weighting more highly the recent data, the regression analysis of trends takes more direction from trends in the last 11 or so years (versus trends during 1988-98).

The projections contain the additional following assumptions:

- High
 - Nova Scotia's economy exhibits high employment growth, in the range of 1.34% per year until 2031, well above its trend rate of about 1.16% per year from 1988 to 2009; and
 - Economic growth rates in some of the ex-urban areas of the Halifax Census Metropolitan Area, such as the Annapolis Valley Region and Halifax–Truro-Moncton corridor, modestly exceed those of the Halifax CMA. The Annapolis Valley Region's share of NS employment rises from 12.7% in late 2009 to about 13.2% in 2031.
- Mid
 - Nova Scotia's employment growth averages about 1.12% per year until 2031, just a fraction below its long run trend rate; and
 - The rate of centralization of the NS economy into the Halifax Census Metropolitan Area slows substantially or halts and the Annapolis Valley Region shows a very slight increase in its share of NS employment from about 12.7% in late 2009 to about 12.8% in 2031.
- Low
 - Nova Scotia's employment growth averages about 1.06% per year until 2031, below its average growth rate of 1.16% per year from 1988 to 2009; and
 - The rate of centralization of the NS economy into the Halifax Census Metropolitan Area accelerates, and the Annapolis Valley Region's share of NS employment declines from 12.7% in late 2009 to about 11.8% by 2031.

Table 2.2: Annapolis Valley Region Employment by Industry, Actual

Annapolis Valley Region, Employment ('000s) by Industry, Labour Force Survey, 1988 - 2009 Annual Average & January 2010																							
	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	Jan. 2010
All Industries	47.0	48.3	48.8	49.7	46.9	45.8	46.5	49.1	47.7	48.0	49.0	51.5	51.3	54.3	56.3	55.5	58.2	56.9	55.3	58.8	57.7	57.1	56.9
Goods Producing Sector	14.6	15.5	15.0	15.6	14.1	13.5	14.5	14.1	13.2	13.2	14.6	15.4	15.5	16.4	16.9	15.8	15.7	14.7	14.9	16.0	15.3	14.9	14.8
Agriculture				3.3	3.6	3.0	2.9	3.1	2.5	2.4	3.2	3.1	3.1	3.1	3.3	3.3	2.2	2.5	1.8	2.0	2.4	2.8	
Forestry, Fishing, Mining, Oil & Gas				1.6	1.5	1.2	1.4	1.0	1.5	1.1	1.3	1.1	1.4	1.6	1.3	1.4	1.3	1.4	1.2	1.3	1.2	1.5	
Utilities				0.3	0.3	0.2	0.2	0.2	0.2	0.2	0.1	0.2	0.3	0.4	0.4	0.3	0.3	0.3	0.1	0.1	0.1	0.2	
Construction				3.7	3.5	3.4	3.6	3.1	3.4	3.4	3.1	3.3	3.3	4.6	4.7	4.1	5.0	3.9	4.6	4.4	4.4	4.7	
Manufacturing				6.7	5.2	5.7	6.4	6.7	5.6	6.1	6.9	7.7	7.4	6.7	7.2	6.7	6.9	6.6	7.2	8.2	7.2	5.7	
Service Producing Sector	32.4	32.8	33.8	34.1	32.8	32.3	32.0	35.0	34.5	34.8	34.4	36.1	35.8	37.9	39.4	39.7	42.5	42.2	40.4	42.8	42.4	42.2	42.1
Trade				8.4	8.0	7.9	6.5	8.1	8.6	8.9	8.5	9.9	9.1	9.4	9.6	9.7	10.1	10.8	9.9	10.8	10.9	10.0	
Transportation & Warehousing				2.8	2.7	2.0	2.3	2.3	2.5	2.4	2.5	2.8	2.3	3.5	3.0	3.1	2.9	2.9	1.7	2.4	2.3	1.8	
Finance, Insurance, Real Estate & Leasing				1.8	1.8	1.5	1.9	2.1	2.0	2.3	2.5	2.3	2.2	2.3	2.6	2.4	1.7	2.0	2.2	2.4	1.9	2.0	
Professional, scientific and technical services				1.0	1.1	1.3	1.3	1.9	1.3	1.2	1.6	1.1	1.7	1.6	1.7	1.8	1.9	1.7	1.7	1.3	2.5	2.1	
Business, building and other support services				1.0	0.8	1.0	1.3	1.7	1.5	1.4	1.5	1.2	1.5	1.3	1.8	1.7	2.2	1.8	2.1	2.2	2.7	3.4	
Educational services				4.2	3.5	3.7	4.0	2.7	3.0	3.0	2.8	3.4	3.9	3.9	4.0	4.8	5.6	4.4	4.4	5.0	4.2	4.5	
Health care and social assistance				5.6	5.8	5.4	5.4	5.9	4.9	5.6	4.8	5.6	6.0	6.5	6.2	7.0	7.4	6.7	7.0	7.6	6.9	7.7	
Information, culture and recreation				1.3	1.2	1.0	1.9	1.5	2.1	1.2	1.5	1.3	1.2	1.3	1.6	1.2	1.4	1.8	1.2	1.6	1.8	1.4	
Accommodation and food services				2.1	2.0	2.3	2.4	2.9	3.0	2.7	3.0	3.2	2.7	3.2	3.2	3.2	3.0	3.5	3.6	4.0	3.9	3.0	
Other services				2.7	2.7	2.8	2.0	2.7	3.0	3.2	2.6	2.5	2.6	2.2	2.7	2.7	3.0	3.2	3.0	2.8	2.4	2.9	
Public Administration				3.2	3.2	3.4	3.0	3.2	2.6	2.9	3.1	2.8	2.6	2.7	3.0	2.1	3.3	3.4	3.6	2.6	2.9	3.4	

Source: CANSIM, Table 282-0061, Labour force survey estimates (LFS), employment by economic region and North American Industry Classification System (NAICS), annual (persons)

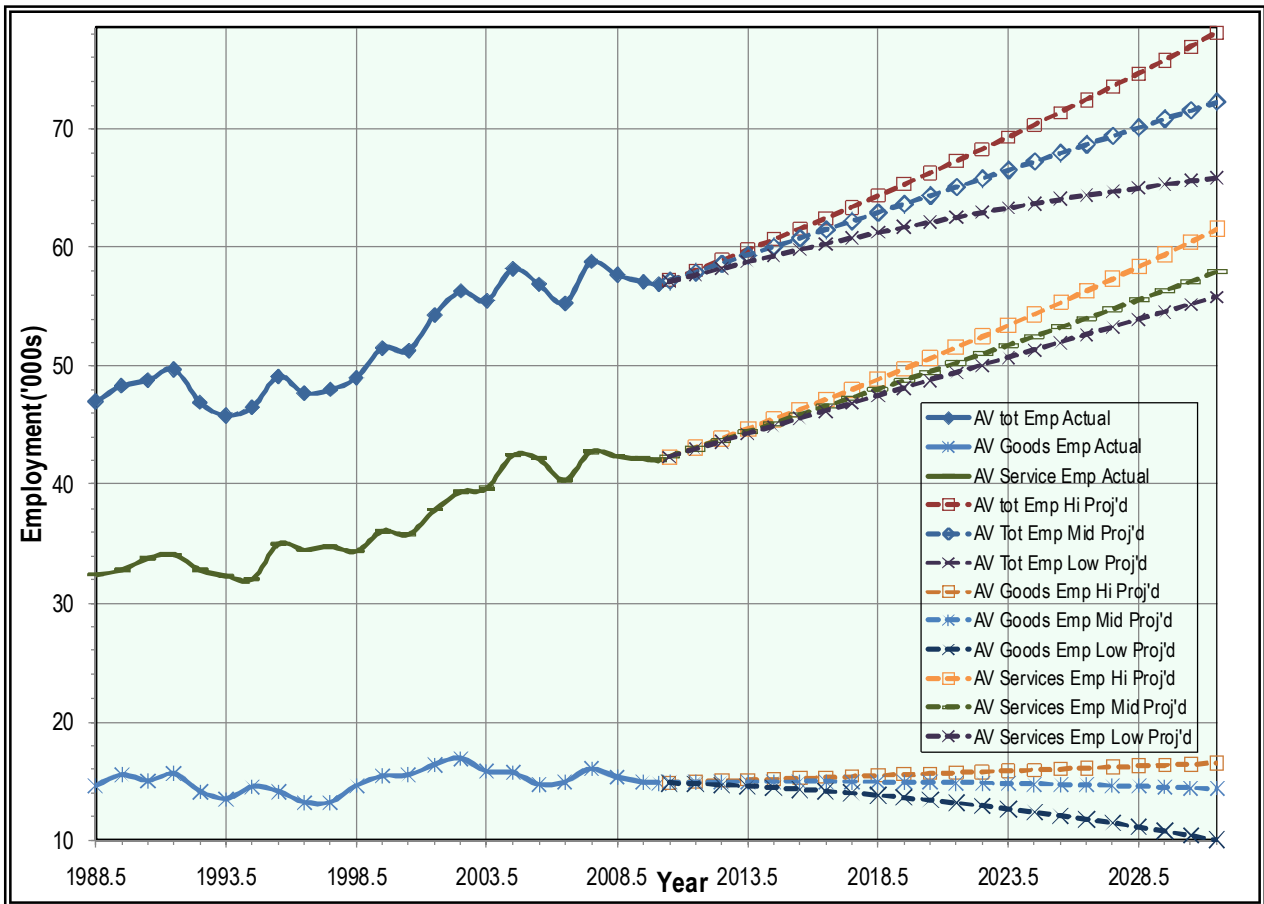


Figure 2.7: Employment by Industry, Annapolis valley Region. (Ave. Annual 1988-2009, Jan. 2010; Actual) (Ave. Annual 2010-31; Projected) Source: Jozsa Management & Economics

2.3.1 Projected Employment Levels in the Region, 2011 - 2031

Table 2.3 summarizes projections for employment levels ('000s) by major industry groupings in the Annapolis Valley Region.

Table 2.3: Annapolis Valley Region, Employment Levels 2011-31 ('000s)

	2011	2016	2021	2026	2031
All Industries					
High	57.3	62.5	67.3	72.5	78.1
Trend	57.2	61.5	65.1	68.7	72.3
Low	57.1	60.3	62.6	64.4	65.9
Goods					
High	15.0	15.3	15.7	16.1	16.5
Trend	14.9	14.9	14.9	14.7	14.4
Low	14.8	14.1	13.2	11.8	10.1
Services					
High	42.4	47.2	51.6	56.4	61.6
Trend	42.3	46.6	50.2	54.0	57.9
Low	42.3	46.2	49.4	52.6	55.8

Source: [Jozsa Management & Economics](#)

Table 2.4 shows the Hants County’s historical and projected shares of employment in the goods and services producing sectors. These percentages were used to estimate Hants County’s projected employment. Those employment projections were further resolved into estimates of the number of jobs that would locate in commercial/industrial parks in Hants County.

Table 2.4: Hants County Share of Annapolis Valley Region Employment by Industry Sector (1991-2006 Actual) (2010-2031 Projected)

Sector	Scenario	Year								
		1991	1996	2001	2006	2010-11	2012-16	2017-21	2022-26	2027-31
Goods Producing	High					39.2%	40.0%	41.2%	42.4%	43.8%
	Mid	35.8%	36.6%	37.3%	38.3%	39.0%	39.6%	40.5%	41.3%	42.2%
	Low					39.0%	39.6%	40.4%	41.3%	42.1%
Service Producing	High					33.3%	33.9%	34.8%	35.7%	36.6%
	Mid	30.2%	31.4%	32.3%	32.6%	33.3%	33.8%	34.6%	35.4%	36.2%
	Low					32.4%	32.0%	31.0%	29.5%	27.5%

Sources: Historical - Census 1991, 1996, 2001, 2006; Projections - [Jozsa Management & Economics](#)

2.3.1.1 IMPLICATIONS OF RISK AND UNCERTAINTY

Projecting economic trends far into the future is replete with risk and uncertainty. Projections for the growth in industrial, commercial, institutional and agricultural employment and the sectors’ demand for building space are subject to more uncertainty than other indicators, such a demographic change, hence the range between high and low scenarios is quite large. Cyclical forces affecting economic change can change abruptly and their affects readily flow across international borders. Demographic shifts, on the other hand, are somewhat constrained by national policies and the greater resistance of people to change location than investment.

Projecting economic trends far into the future is replete with risk and uncertainty as they are subject to:

- short-term cyclical changes that may differ from those in the past, such as the ebbs and flows associated with changes in relative currency values or demand for primary commodities such as newsprint; and
- long-term structural changes, such as a shift by primary agriculture to less land-intensive, more value added oriented production; changes in response to global warming, to major changes in public infrastructure such as the creation of Highway 101, or to the growing demand for bio-fuels.

Growth in the demand for bio-fuels could have a significant impact on the primary agriculture sector and on manufacturing in the Annapolis Valley Region. More modest but important expansions can be expected due to the growth in the number and size of farm wineries and the growth path to 1,000 ha of grapes planted (vs. about 250 ha in 2010). The winery and grape growing expansions could also provide a boost to the Valley Region’s tourism sector.

2.3.2 Employment Potentially Located in Business/Industrial Parks, Annapolis Valley Region

To estimate the potential number of jobs that would locate in a business/industrial park, we examined the typical location practices of the industry types shown in Table 2.2. As a group, about 60.8% of the employment from the Goods Producing Sector could potentially locate in a business/industrial park. Similarly about 18.0% of the employment represented by growth in the Service Producing Sector could potentially locate in an industrial/commercial park. These are conservative numbers based on experience; therefore we assume that these percentages of growth would locate to parks in the Annapolis Valley Region.

Table 2.5 shows the projection for new employment locating in industrial/commercial parks in the Annapolis Valley Region during each five-year period until 2031.

Table 2.5: Annapolis Valley Region, Potential Employment ('000s) Located in Industrial/Commercial Parks 2010-31

	2010-11	2012-16	2017-21	2022-26	2027-31	Cumulative
All Industries						
High	0.15	1.16	1.09	1.17	1.26	4.84
Trend	0.08	0.87	0.73	0.75	0.77	3.20
Low	0.07	0.76	0.64	0.64	0.64	2.76
Goods						
High	0.08	0.26	0.27	0.28	0.28	1.17
Trend	0.02	0.07	0.03	0.03	0.03	0.20
Low	0.01	0.03	0.03	0.03	0.03	0.13
Services						
High	0.07	0.89	0.82	0.90	0.98	3.67
Trend	0.06	0.79	0.69	0.72	0.74	3.01
Low	0.06	0.73	0.61	0.61	0.61	2.63

Source: *Jozsa Management & Economics*

Conversely, concerted marketing and land use planning can raise the portion of growth that locates in planned business/industrial areas. The examples of the Bayer's Lake Business Park, Burnside Industrial Park and Burnside Business Park in the Halifax Regional municipalities are cases in point where land use plans' strong marketing efforts helped to direct the ICI growth to the planned business parks.

We assume that about 0.08% of existing employment will relocate each year to industrial/commercial parks. This assumption is based on historical trends in Canada.

2.3.3 Employment Potentially Located in Business/Industrial Parks in Hants County

The projections for potential employment in industrial/commercial parks in Hants County, shown in Table 2.6, are based on Hants County's growth in goods and service producing employment and the propensity of sub-sectors within the two to locate in commercial/industrial parks, as detailed in sections 2.3.1 and 2.3.2.

Table 2.6: Hants County, Potential Employment Growth in Industrial/Commercial Parks 2010-31

	2010-11	2012-16	2017-21	2022-26	2027-31	2010-31
Total						
High	53	409	398	438	482	1,779
Trend	29	298	254	268	282	1,130
Low	25	246	202	192	179	844
Goods						
High	30	105	111	117	124	488
Trend	8	30	14	14	14	79
Low	5	13	13	12	11	54
Services						
High	23	304	287	321	358	1,292
Trend	21	269	240	254	268	1,051
Low	19	233	189	181	168	790

Source: *Jozsa Management & Economics*

2.4 Potential Demand for Space in Business/Industrial Parks

2.4.1 Potential Growth in the Annapolis Valley Region

Based on the average space needs of the types of businesses in each of the industry groupings⁷, Table 2.7 shows the metres² of building space that would be required to accommodate the jobs in industrial/commercial parks in the Annapolis Valley Region.

Table 2.7: Annapolis Valley Region, Potential Growth in Building Footprint Space (m²) 2010-31

	2010-11	2012-16	2017-21	2022-26	2027-31	Cumulative
All Industries						
High	5,586	40,552	38,547	41,235	44,145	170,065
Trend	2,938	29,071	23,992	24,751	25,501	106,253
Low	2,538	25,106	21,268	21,180	21,054	91,146
Goods						
High	3,368	11,452	11,727	12,009	12,297	50,852
Trend	879	3,255	1,479	1,467	1,443	8,522
Low	589	1,441	1,366	1,254	1,104	5,754
Services						
High	2,218	29,100	26,820	29,227	31,848	119,213
Trend	2,059	25,816	22,514	23,284	24,058	97,731
Low	1,949	23,665	19,902	19,926	19,950	85,392

Source: *Jozsa Management & Economics*

⁷ Based on information from:

- “Employment Densities: A Full Guide, Final Report” Arup Economics + Planning, 2001;
- “Nova Scotia Statistical Review 2006, Office and Industrial Market, 2002 to 2006” Nova Scotia Department of Finance;
- “Official Community Plan” Town of Burnaby, British Columbia, 2007;
- the types of businesses most likely to expand and locate in Hants County; and
- current employment densities in parks in Hants County.

We estimate that about 45.1 m² and 32.5 m² of building space are required per employee in the goods producing and service producing sectors, respectively.

2.4.2 Potential Growth in Building Space in Business/Industrial Parks in Hants County

Table 2.8 provides projections of the growth in building footprints in meters squared (m²) for parks in Hants County.

Table 2.8: Hants County Potential Growth in Building Footprint Space (m²) Located in Industrial Commercial Parks 2010-31

	2010-11	2012-16	2017-21	2022-26	2027-31	Cumulative
All Industries						
High	2,059	14,449	14,157	15,521	17,033	63,218
Trend	1,028	10,026	8,395	8,853	9,317	37,620
Low	861	8,133	6,714	6,387	5,942	28,037
Goods						
High	1,320	4,578	4,827	5,097	5,390	21,212
Trend	343	1,290	598	606	609	3,446
Low	230	571	552	517	465	2,336
Services						
High	739	9,871	9,330	10,423	11,642	42,006
Trend	685	8,737	7,797	8,247	8,708	34,174
Low	631	7,562	6,161	5,870	5,477	25,701

Source: [Jozsa Management & Economics](#)

Two opposing forces will affect this projection:

- The first suggests that the projection could be on the low side because the proposed industrial/commercial park should make the Hants County more attractive place to expand and locate;
- The second suggests that projection could be on the high side because, despite the reported shortage of planned industrial/commercial space in Hants County, there is room for more businesses in the existing parks in the Annapolis Valley Region, which will compete for new land sales with parks in Hants County. The vacant developed space in Annapolis Valley parks that was ready for sale at the time of writing is as follows:
 - Annapolis Valley Regional Industrial Park, about 3.0 ha;
 - Bridgetown Development Centre, 1.4 ha;
 - Coldbrook Village Park, about 6.3 ha;
 - East Hants Business Park, about 2.1 ha;
 - Kespuwick Industrial and Business Park, 4.5 ha;
 - Kings County Municipal Airport Business Park, about 0.5 ha;
 - Middleton Industrial Park, 2.5 ha;
 - Port Williams Industrial Park, about 5.1 ha;
 - Uniacke Business Park, 25.6 ha; and
 - Windsor-West Hants Industrial Park, 3.9 ha.

2.4.3 Potential Growth in Hectares in Business/Industrial Parks in Kings County

The projections of the expansion of demand for land in industrial/commercial parks in Hants County (Table 2.9) are based on the following assumptions:

- Goods producing establishments;
 - require 45.1 m² of building space per job,

- have a coverage ratio of about 12.6% (i.e., for every 1.0 m² of building footprint, an additional 7.9 m² is taken up by open work area/storage space, parking, landscaping around buildings, sidewalks, roads, utility corridors for common use services such as power lines and on-site sewage treatment, buffer space, and so on); and
- Services producing establishments;
 - require about 32.5 m² of building space per job
 - have a coverage ratio of about 22.1% (i.e., for every 1.0 m² of building footprint an additional 4.5 m² is required).⁸

Table 2.9: Hants County Potential Industrial/Commercial Parks Expansions (ha sold), 2010-31

	2010-11	2012-16	2017-21	2022-26	2027-31	2010-31
Total						
High	1.8	11.0	10.9	11.9	13.0	48.7
Mid	0.8	7.0	5.7	6.0	6.3	25.8
Low	0.6	5.5	4.6	4.3	4.0	19.1
Goods						
High	1.3	4.6	4.8	5.1	5.4	21.3
Mid	0.3	1.3	0.6	0.6	0.6	3.5
Low	0.2	0.6	0.6	0.5	0.5	2.3
Services						
High	0.5	6.4	6.1	6.8	7.6	27.4
Mid	0.4	5.7	5.1	5.4	5.7	22.3
Low	0.4	4.9	4.0	3.8	3.6	16.8

Source: [Jozsa Management & Economics](#)

2.4.4 Potential Land Demand in Existing Parks in West Hants and a New Industrial/Commercial Park

Table 2.10 provides an overview of the commercial/industrial parks that would be the most immediate competitors to a new park in Hants County. However, despite the consultant's extensive efforts, we were unable to collect information for 85% of the parks in the AVR. Moreover, only partial information could be collected for the other 15% of the parks. We found virtually no evidence of marketing, selling or administrative efforts being applied to park in the AVR.

⁸ The average coverage ratio at parks in the Annapolis Valley region tends to be lower. We assume that a new park will follow the current trend towards increased densities.

Table 2.10: Overview of Industrial/Commercial Parks in the Annapolis Valley Region

Park Name	Location	Administration	Years Open	Gross Area (developed + undeveloped) (ha)	Sold (ha)	Vacant (ready for sale) (ha)	Roads & Open Space (% of net developed)
<u>Annapolis Valley Regional Industrial Park</u>	Kentville	NSDT&PW, NS Business Inc.	28	78.9	41.1	3.0	18.6
<u>Annapolis Valley Business Mall</u>	Kentville	Real Property Services NSDT&PW	15	0.09	0.6	-	N/A
Bridgetown Development Centre	Bridgetown	Real Property Services NSDT&PW	11	3.1	1.4	1.4	N/A
<u>Coldbrook Village Park</u>	Kentville	Coldbrook Developments Ltd.	17	18.8	7.8	6.3	33.0
East Hants Business Park	Mun. of East Hants	East Hants	25	79.4	11.1	2.1	15.3
Kepuswick Industrial. & Business Parks	Cornwallis	Kepuswick Developments	13	57.9	7.7	4.5	N/A
Kings County Municipal Airport Business Park	Waterville	Kings Cty.- Waterville Airport Co-op	29	38.1	0.7	0.5	56.2
Middleton Industrial Park	Middleton	Town of Middleton	24	32.4	10.2	2.5	28.4
<u>Port Williams Industrial Park</u>	Port Williams	Starr's Point Developments Ltd.	19	10.1	3.9	5.1	13.1
<u>Uniacke Business Park</u>	Mt. Uniacke	Municipality of East Hants	<10	49.9	16.8	25.6	17.81
<u>Windsor Industrial Park</u>	Windsor	Windsor-Municipality of West Hants	40	53.0	19.9	-	16.9
<u>Windsor-West Hants Industrial Park</u>	Windsor	NSDT&PW	29	23.6	12.0	3.9	3.1 (roads not included)
<u>Windsor-West Hants Industrial Mall</u>	Windsor	Real Property Services – NSDT&PW	23	0.09	0.6 tot	-	N/A

Parks double underlined are within 35 km (road distance) of Windsor

Within 35 km by road from Windsor, there are a number of industrial parks. Most were developed with federal government funding 20 to 30 years ago and are a range of sizes. There are also two industrial malls which house administrative and commercial offices located within the larger parks. None of the parks have a specific economic sector focus, but frequent uses include transportation, manufacturing, food processing and commercial businesses such as construction suppliers. Some parks are operated by private developers, but most are run by a municipality, the Nova Scotia Department of Transportation and Public Works (NSTPW), or through a government or public/ private partnership.

Less than the 50.4 hectares that are developed and vacant in parks within 35 km (road distance) from Windsor are effectively available to development because:

- The Annapolis Valley Regional Industrial Park has land use constraints to protect the Park's well-field area (the Park was previously supplied by surface water sources). Moreover, our analysis assumes that Kings County, and this park and other parks located in Kings County, continue to attract employment based on Kings County's projected share of goods and service producing employment in the Valley Region⁹;
- The space at the Windsor- West Hants Industrial Park would presumably be sold, or included in the land supply of a new Windsor – West Hants industrial park, before major expansions are considered by Windsor and West Hants; and
- Despite being seven road minutes closer to Windsor than Downtown Halifax, the Uniacke Business Park in Hants County is more oriented to servicing demand that would otherwise locate in the commercial/industrial parks that ring Halifax and Dartmouth.

Existing parks in the Annapolis Valley Region have historically shown job densities that are much lower than in modern parks (about 30.9 jobs/ha sold vs. about 57.6 expected for a new park).¹⁰ The increasing average job density stems from four forces:

- increasing land cost;
- improved land use and infrastructure planning;
- rapid growth of the service and commercial sectors; and
- slow growth in the goods producing sectors.

We assume that in the future, new businesses moving into existing parks will reach modern job densities. Therefore, although the existing parks in Hants County are assumed to absorb their historical share of employment in Hants County, they will do so via smaller land sales.¹¹ Based on their historical job absorption rates and more modern job densities, Table 2.11 demonstrates the existing parks in Hants County's projections for sales in existing parks during 2010-31.

⁹ The same assumptions are made for Annapolis County.

¹⁰ Average annual land absorption rates for parks within 35 km. of Windsor are:

- Annapolis Valley Regional Industrial Park, about 1.17ha/year for the period 1975 – 2009;
- Annapolis Valley Business Mall, about 0.03 ha/yr, for the period 1992 to 2009;
- Coldbrook Village Park, about 0.39 ha/yr for the period 1990 – 2009;
- Port Williams Industrial Park, about 0.18 ha/year for the period 1988 – 2009;
- Uniacke Business Park, about 0.58 ha/yr for the period 1981 to 2009;
- Windsor Industrial Park, about 0.40 ha/yr for the period 1960 to 2009;
- Windsor – West Hants Industrial Mall, about 0.02 ha/yr for the period 1982 to 2009; and
- Windsor – West Hants Industrial Park, about 0.39ha/yr for the period 1983 to 2009.

As described in the body of the report and Appendix B, current data on land sales, occupancy rates and supply of serviced land were not available. Therefore these absorption rates were estimated.

¹¹ Recall the employment growth in the Rest of the Annapolis Valley Region has already estimated based on overall employment growth in the Valley Region and projections the changing share of goods producing and service producing employment between Hants County and the Rest of the Valley Region. Therefore calculations from this point on need to deal with only the location of Hants County employment growth in or outside of existing Hants County Parks.

Table 2.11: Potential Growth in Existing Hants County Parks (ha sold) 2010-31

	2010-11	2012-16	2017-21	2022-26	2027-31	2010-31
Total						
High	1.7	10.3	10.2	11.1	12.2	45.5
Mid	0.7	5.8	4.7	5.0	5.2	21.5
Low	0.5	4.6	3.8	3.6	3.4	15.9
Goods						
High	1.2	4.3	4.5	4.8	5.1	19.9
Mid	0.3	1.1	0.5	0.5	0.5	2.9
Low	0.2	0.5	0.5	0.4	0.4	1.9
Services						
High	0.5	6.0	5.7	6.4	7.1	25.6
Mid	0.4	4.7	4.2	4.5	4.7	18.6
Low	0.3	4.1	3.3	3.2	3.0	13.9

Source: *Jozsa Management & Economics*

Table 2.12 shows the remaining potential for land sales (not including common user space) in a new commercial/industrial park in Hants County. The resulting annual sales rates are as follows:

- high, 0.81 ha/year;
- mid, 0.51 ha/year; and
- low, 0.38 ha/year.

Table 2.12 assumes that existing parks maintain their relative absorption rates as compared to the employment growth trends. That is, higher employment growth rates lead to higher absorption rates, and vice versa. It also assumes that an expanded Windsor or Windsor-West Hants industrial park would, by virtue of its location and enhanced marketing and sales functions, increase its absorption rate to accommodate demand that exceeds the trend absorption rates of competing parks in Hants County.

Table 2.12 shows the demand in terms of hectares sold. The actual expansion would be larger due to the room needed for common spaces (roads, power lines, green space, etc.).

Table 2.12: Potential Hectare Sales at an Expanded Windsor Industrial Park (ha sold) 2010-31

	2010-11	2012-16	2017-21	2022-26	2027-31	2010-31
Total						
High	-	1.4	3.4	4.2	4.9	13.9
Mid	-	-	2.0	2.5	2.8	7.3
Low	-	-	0.8	1.8	1.8	4.5
Goods						
High	-	0.6	1.5	1.8	2.1	5.9
Mid	-	-	0.2	0.3	0.3	0.7
Low	-	-	0.1	0.2	0.2	0.5
Services						
High	-	0.8	1.9	2.4	2.9	8.0
Mid	-	-	1.8	2.3	2.5	6.6
Low	-	-	0.7	1.6	1.6	3.9

Source: *Jozsa Management & Economics*

2.4.5 Summary of Demand for Land

There are now about 5.5 hectares of prepared land at the Windsor-West Hants Industrial Park that are ready for sale. Therefore, the park will not need to expand until about 2016, that is, until most of the vacant prepared land has been sold.

From about 2016 to 2031, the following amounts of prepared land for sale will need to be added to the current supply:

- High growth scenario, add about 13.9 ha of land for sale, plus common use space (roads, utility corridors, green space, etc.), leaving the park fully occupied by about 2031;
- Mid growth scenario, add about 7.3 ha of land for sale, plus common use space (roads, utility corridors, green space, etc.), leaving the park fully occupied by about 2031; and
- Low growth scenario, add about 4.5 ha of land for sale, plus common use space (roads, utility corridors, green space, etc.), leaving the park with about 2.6 ha of vacant land available for sale by about 2031.

To allow a vacancy rate to ensure that the park has some land ‘in stock’ ready for sale in the high and mid growth scenarios, additions of net ha (i.e., land for sale) should be increased by at least 5%.

These demand levels remain after allowances for:

- Projections of employment growth that will locate in Annapolis and Kings Counties regardless of the creation of more planned commercial/industrial space in West Hants; and
- Projected absorption of employment by other parks in Hants County, regardless of the creation of more planned commercial/ industrial space in West Hants.

The land use and development plan for the new park must be able to accommodate the following factors:

- The annual demand for land will not reveal itself at an even annual pace; purchases of land in the new park will be sporadic. The development phasing will accommodate expansions that do not occur at an even annual pace;
- Aggregate demand for land in the new park will likely fall within the range of the projections. Actual trends in demand will need to be followed closely to help determine if the park is developing along the high trend or low demand scenarios. Scheduling of the development phases should then be adjusted accordingly;
- The final size of the park will be about 5% larger than demand to allow for a modest vacancy rate. Potential buyers generally have already made the decision to build new or relocate. Therefore prepared land must be “in stock” or the park risks losing the sale; and
- The new park will make West Hants a more attractive place to expand and create new businesses. However, the new park must also expect significant competition from existing business/industrial parks. The existing parks will likely change their marketing strategies to deal with the competition offered by a new park.

In addition, the new park will need to be supported by a broader infrastructure development and marketing/selling plan to:

- Increase the Annapolis Valley Region's attractiveness for economic growth, thus increasing its traditional share of growth in the NS economy; and
- Maintain and build on the 1991 – 2006 trends that show Hants County becoming home to increasing shares of the Valley Region's goods producing and service producing employment.

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Chapter 3 **Existing Conditions**

3.1 Zoning

3.1.1 West Hants Zoning

The Municipality of the District of West Hants Municipal Planning Strategy and Land Use Bylaw are the legislative documents which control land use and development within the District. Industrial land uses area permitted and regulated in six different zones (see Figure 3.1):

- Resource Industrial (M-1);
- Hamlet Industrial (M-2);
- Local Industrial (LI);
- Light Industrial (LI-1);
- Joint Industrial Type Two (LI-2); and
- Joint Industrial Type Three (LI-3).

3.1.2 Town of Windsor Zoning

The Town of Windsor Municipal Planning Strategy and Land Use Bylaw guide development in the Town of Windsor located in the centre of Hants West. Industrial land uses area permitted and regulated in three different zones (see Figure 3.2):

- Light Industrial (LI-1);
- Joint Industrial Type Two (LI-2); and
- Joint Industrial Type Three (LI-3).

3.1.3 Hantsport Zoning

Zoning for Hantsport was not available.

3.2 Land Use

The study area within West Hants is a primarily rural area with development concentrated in the Town of Windsor, Three Mile Plains and Falmouth.

3.2.1 Town of Windsor

With a population of approximately 3,800, the Town of Windsor is the primary community within the study area. In its role as a regional services centre, “approximately 60 percent of the total retail trade activity occurring in the West Hants area takes place in Windsor. In addition, many government and other administrative offices are located in Windsor.”¹² Most of the developed area of Windsor is serviced with municipal water and sewer. The development principles outlined in the Windsor Municipal Planning Strategy relevant to the expansion of an industrial park lands in the study area include:

- Providing more flexibility in allowing consideration of mixed use development;

¹² Town of Windsor Municipal Planning Strategy, September 3 2009, p. 2.

**MUNICIPALITY OF THE
DISTRICT OF WEST HANTS
LAND USE BYLAW**

SCHEDULE A - ZONING MAP

- Single Unit Residential
- Two Unit Residential
- Multiple Residential
- Rural Residential
- Manufactured Home Park
- General Commercial
- Highway Commercial
- Local Commercial
- Rural Commercial
- Recreation Commercial
- Prime Agriculture
- Agricultural Priority 2
- Agricultural Priority 3
- Open Space
- General Resource
- Hamlet Industrial
- Institutional
- Local Industrial
- Resource Industrial
- Joint Industrial Type 2
- Joint Industrial Type 3
- Landfill
- Water Supply
- Mineral Resource
- Dykelands

APPROVED: Month, Date, Year, As amended to _____

This map forms part of the Land Use By-law for the Municipality of West Hants and must be read in conjunction with the written text which also forms part of this said by-law.

Base data derived from the Nova Scotia Property Records Database (NSPRD), Copyright Her Majesty The Queen in Right of the Province of Nova Scotia.

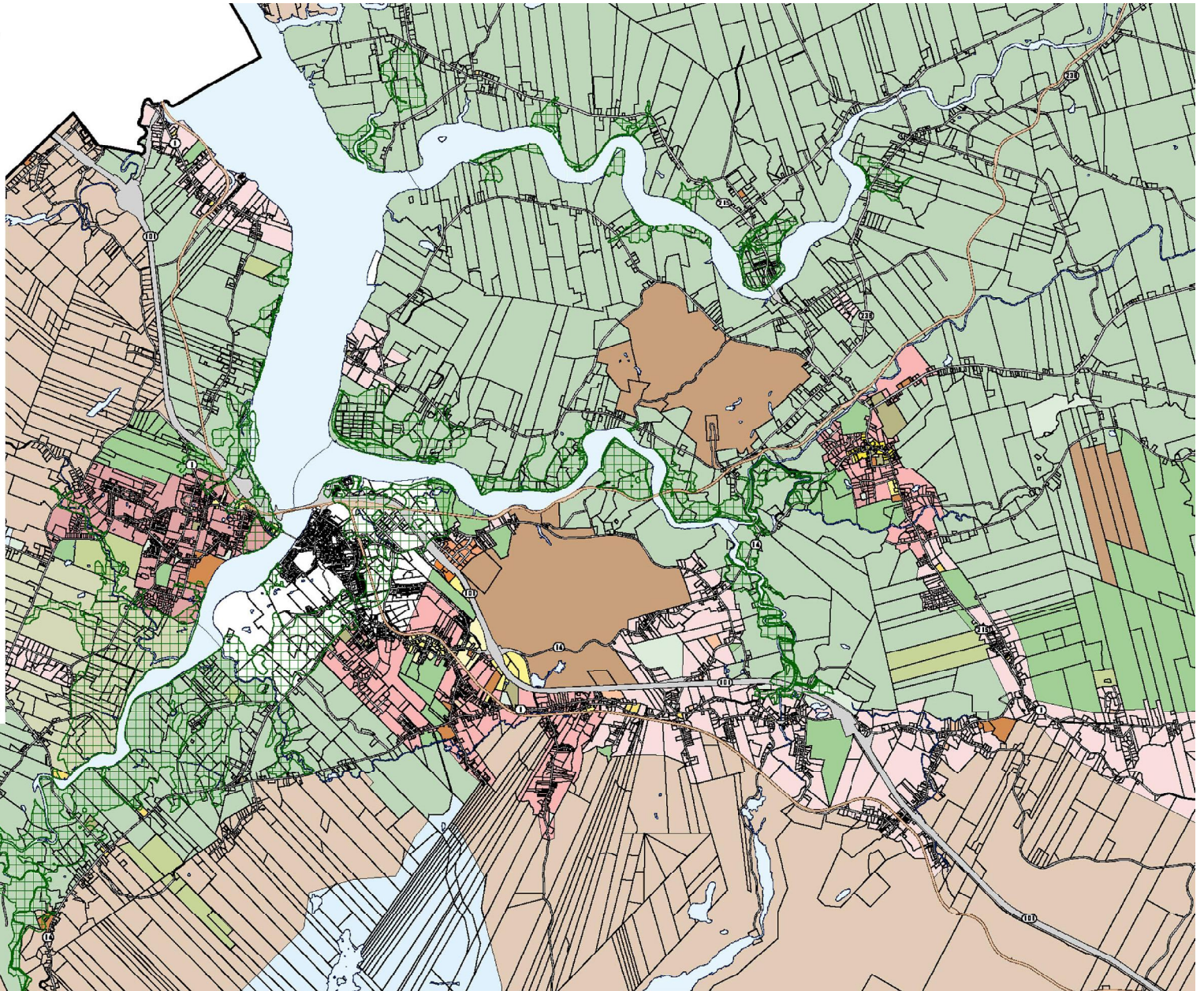


Figure 3.1 - West Hants Zoning

**TOWN OF WINDSOR
LAND USE BY-LAW
SCHEDULE A - ZONING**

Prepared by:
Windsor-West Hants
Joint Planning Advisory Committee

- R1 - Single Unit Residential
- R2 - Two Unit Residential
- R3 - Medium Density Residential
- R4 - High Density Residential
- CR-CDD - College Road Comprehensive Development District
- TC - Town Centre
- P-CDD - Pesaquid Comprehensive Development District
- LC - Local Commercial
- GC - General Commercial
- HC - Highway Commercial
- SC - Shopping Centre
- WR-C - Wentworth Road Commercial
- FG - Fairground
- LI-1 - Light Industrial
- LI-2 - Joint Industrial Type Two
- LI-3 - Joint Industrial Type Three
- I - Institutional
- OS - Open Space
- AG - Agriculture

Environmental Constraints

APPROVED: September 21, 2005, As amended to September 3, 2009.

This map forms part of the Land Use By-law for the Town of Windsor and must be read in conjunction with the written text which also forms part of the said by-law.

Base data derived from the Nova Scotia Property Records Database (NSPRD), Copyright Her Majesty The Queen in Right of the Province of Nova Scotia.



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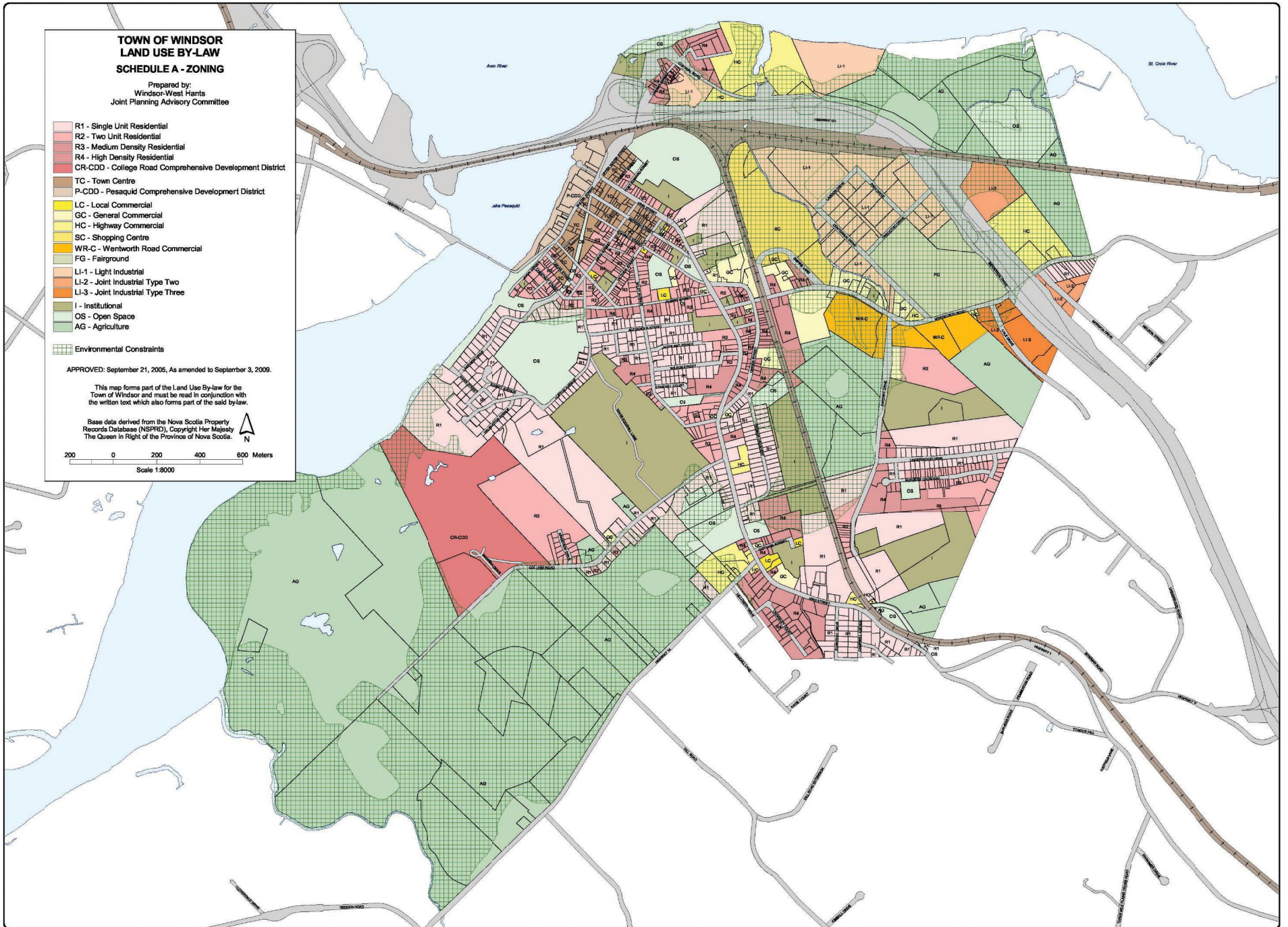


Figure 3.2 - Windsor Zoning

- Encouraging compact residential and commercial growth similar to existing development in the older sections of the Town, which makes best use of municipal infrastructure including roads, sidewalks and water and sewer services;
- Allowing for a broader range of uses in the Windsor Industrial Park;
- Maintaining and promote the downtown as the main business district;
- Establishing development standards for the Wentworth Road area which control the type, location, scale and design of new development and enhance its role as one of the main entrances to the Town; and
- Protecting active farms and agricultural dyke land from encroaching development.

Specific policies in the MPS reacted to industrial development include:

- Policy 10.0.1 It shall be the policy of Council to work jointly with the Municipality of West Hants and other provincial and federal agencies in the provision and maintenance of sufficient industrial lands to meet the needs of a growing population.
- Policy 10.0.2 It shall be the policy of Council to encourage and where possible to actively support efforts which promote industrial development in appropriate areas of the Town of Windsor and Municipality of West Hants.
- Policy 10.0.3 It shall be the policy of Council to encourage the development of light industrial uses that are not obnoxious by reason of sight, sound, smell, dust or fumes.

3.2.2 West Hants

The Municipal Planning Strategy for the Municipality of the District of Hants designates four distinct character areas for the future development in the District: Growth Centres, Villages, Hamlets, and Resource Areas. Growth Centres are intended to accommodate most of the future non-rural development which will occur in West Hants, with the intent to relieve development pressure from non-renewable resource lands.

The Municipal Planning Strategy for West Hants includes the following general goals¹³:

- Encourage more dense development in the Growth Centre designation within servicing boundaries;
- Encourage large-scale commercial and industrial development to locate in the Growth Centres and industrial parks, and work with the Town of Windsor to maintain commercial service centres for both West Hants and the Town;
- Encourage development which does not place undue strain on the existing facilities or financial resources of West Hants; and
- Identify areas with constraints for development because of soil conditions, topography, risk of flooding, subsidence or other conditions.

The Municipal Planning Strategy for West Hants states that Three Mile Plains, located immediately south of the Town of Windsor, is fully serviced with municipal water and sewer and has the capacity to accommodate a considerable amount of new commercial and residential development. Falmouth, located on the west side of the Avon River, has developed as a mainly residential area and contains a significant amount of serviced land still available for future development.

¹³ Municipality of the District of West Hants Municipal Planning Strategy, June 26, 2008, p. 5.

While the village of Brooklyn has historically provided commercial and institutional services to the surrounding communities, and it includes a densely developed core area of residential and commercial uses, it is not designated a Growth Centre. The West Hants MPS states that:

“Because of the expense involved in constructing, extending and maintaining municipal water and sewer infrastructure, these services will be provided only in the two existing Growth Centres of Three Mile Plains and Falmouth, as well as the Windsor-West Hants Joint Industrial Park.”¹⁴

The West Hants MPS recognizes the importance of agriculture to the area and states that there “are close to 6,000 acres of dyke land in the county, representing some of the most productive agricultural land in the province,”¹⁵ and that it is important to preserve these lands in agricultural use.

“Recent development pressures have meant, however, that some of these areas are beginning to be considered for non-farm uses. Non-farm development on dyke lands is a concern, not only because it means the loss of valuable agricultural land, but also because of the risk of flooding and the drainage problems associated with these lands.”¹⁶

The MPS recognizes that the county contains significant gypsum deposits and that the gypsum industry plays an important role in the economy of the area.¹⁷ The Fundy Gypsum Company owns large tracts of land in the county. It was operating two mining sites, but recently announced that the one in Miller Creek would be closed.¹⁸

The MPS also recognizes that large portions of the southern and north-eastern part of the county are Crown land or owned by large forestry companies. The former importance of the forest industry to the area is demonstrated by the presence of Minas Bay Pulp and Paper in Hantsport, which now produces 100% recycled paperboard products.

3.2.3 The Windsor West Hants Joint Industrial Park

The Windsor-West Hants Joint Industrial Park is located at Exit 5A (Wentworth Road) on Highway 101, and straddles the boundary of West Hants and the Town of Windsor. The Park consists of approximately 100 acres of land, most of which is developed.

As noted in the Windsor MPS

“The portion of the Park to the east of Highway 101, containing approximately 68 acres, will be developed primarily for light industrial uses; however, limited highway commercial uses and other commercial uses which provide support to the park will also be permitted in this portion of the Joint Industrial Park. The portion of the park located on the western side of Highway 101 and containing approximately 33 acres is intended to permit uses which are primarily Highway Commercial in nature, as well as a limited range of light industrial uses considered to be

¹⁴ Ibid, p. 6.

¹⁵ Ibid, p. 8.

¹⁶ Ibid, p. 92.

¹⁷ Ibid, p. 9.

¹⁸ Fundy Gypsum set to lay off workers, The Chronicle Herald, accessed on the world wide web on 20 February 2010 at <http://thechronicleherald.ca/NovaScotia/1168571.html>.

compatible with retail/commercial uses. Other light industrial uses shall be encouraged to locate in the portion of the Joint Industrial Park on the eastern side of Highway 101.”¹⁹

The Town of Windsor and the District of West Hants have a history of cooperation when it comes to the provision of serviced industrial land. The park was established in 1978 by the provincial government and both municipal units recognize the park as a special entity, where their respective Municipal Planning Strategies reference each other in regards to the park, and the Windsor-West Hants Joint Planning Advisory Committee reviews planning issues, development proposals and amendments that may impact the Joint Industrial Park.

Policy 10.2.7 The expansion of the Joint Industrial Park may be permitted by amendment to this Strategy and to the Land Use By-law subject to the following considerations:

- (a) the land becomes part of the Joint Industrial Park;
- (b) the amendment is carried out concurrently by the Town of Windsor²⁰

3.2.4 Town of Hantsport

The Town of Hantsport contains a fairly active downtown area primarily surrounded by residential development. Adjacent to the downtown area is the Minas Basin Pulp and Power Company plant. The rail line and switching yards associated with the plant run through the middle of town.

3.3 Infrastructure

3.3.1 Transportation

West Hants is bisected by Highway 101, which leads to Halifax to the south, and the Annapolis Valley to west. The Town of Windsor is immediately adjacent to the Highway and the Windsor –West Hants Industrial Park straddles the route. Hantsport is located approximated 1.5 kilometres from the Exit 8 interchange. The Nova Scotia Department of Transportation and Infrastructure Renewal is continuing to upgrade Highway 101, and twinning of the highway from Halifax to Windsor is expected to be completed in the Spring of 2010. This highway also connects to Highway 102 in Bedford, providing easy access to the Halifax Robert L. Stanfield International Airport. Estimated average annual daily traffic along Highway 101 in the area for 2005 was 14,900 vehicles per day, with an estimated increase to 16,500 by 2010.²¹

The Windsor and Hantsport Railway operate a marshalling yard adjacent to Highway 101 in Windsor. The railway connects with the Canadian National (CN) railway mainline at Windsor Junction, just north of Halifax, providing access to the Port of Halifax marine facilities and westward throughout Canada and the United States.

The Halifax Robert L. Stanfield Airport is approximately a one hour drive away. This airport offers full service to passengers and cargo clients including U.S. customs pre-clearance.

¹⁹ Town of Windsor Municipal Planning Strategy, p. 48.

²⁰ Ibid, p. 50.

²¹ West Hants Community Profile, Hants Regional Development Authority

Kings Transit provides a public bus service through the area providing connections from Brooklyn, Windsor, Falmouth, and Hantsport through the major communities of the Annapolis Valley to Weymouth. Kings Transit recently issued a request for proposals to look at extending a connection to Mount Uniacke and onwards to connect with Halifax Metro Transit in Sackville.

3.3.2 Sewer and Water

Most of West Hants uses private wells and on-site sewage disposal, although the central developed areas of Windsor, Three Mile Plains and Falmouth as well as the adjacent hamlet of Wentworth Creek have central services. It is assumed that Hantsport offers central services.

Treated water is supplied to the Town of Windsor, Three Mile Plains and along the Wentworth Road (including the Joint Industrial Park) to the Fundy Gypsum plant at Wentworth Creek from Mill Lake, which can yield between two and three million imperial gallons per day. Usage in 2002 was 700,000 imperial gallons per day, when a new treatment plant with a capacity of 1.5 million imperial gallons per day was completed. Residents of Falmouth receive treated water from the French Mill Brook reservoir, which consists of a mechanical feed to a 700,000-gallon stand pipe. The District of West Hants is planning for upgrades to this water treatment facility, as a 2002 study found that it will not be able to meet projected demand beyond 2016.²²

Sewage treatment is provided for approximately 450,000 imperial gallons of raw sewage per day from the eastern end of Windsor and Three Mile Plains, where the storm water and sewage collection are separated. The plant has the capacity to treat another 100,000 imperial gallons per day. In the downtown and western end of Windsor, where the storm water and sewage collection systems are combined, in an area comprising about two-thirds of Windsor, sewage is discharged without treatment at one outlet near the convergence of the St. Croix and Avon Rivers. Approximately 500 homes in Falmouth have central sewage service. A 2005 study concluded that the plant was at capacity and in need of replacement.²³

The Windsor MPS states that

“The provision of water and sewer services for commercial or industrial development will be considered as the need arises. In particular, the Windsor-West Hants Joint Industrial Park may be considered for future extension of services.”²⁴

The West Hants MPS states that

“Council will establish service area boundaries beyond which sewer and water lines will not be extended. As in earlier planning strategies, the boundaries of the Three Mile Plains and Falmouth Growth Centres and the Windsor-West Hants Joint Industrial Park will be treated as the service area boundaries.”²⁵

²² Municipality of the District of West Hants Municipal Planning Strategy, June 26, 2008, p. 105.

²³ Ibid, p105.

²⁴ Town of Windsor Municipal Planning Strategy, p. 65.

²⁵ Municipality of the District of West Hants Municipal Planning Strategy, June 26, 2008, p. 105.

3.4 Geologic Constraints

The West Hants MPS states that

“Areas ... especially around Upper Falmouth and the Highway 101 corridor may be subject to subsidence due to geological formations and surface and groundwater activity. The most visible evidence of this is the abundance of sinkholes or karst topography.”²⁶

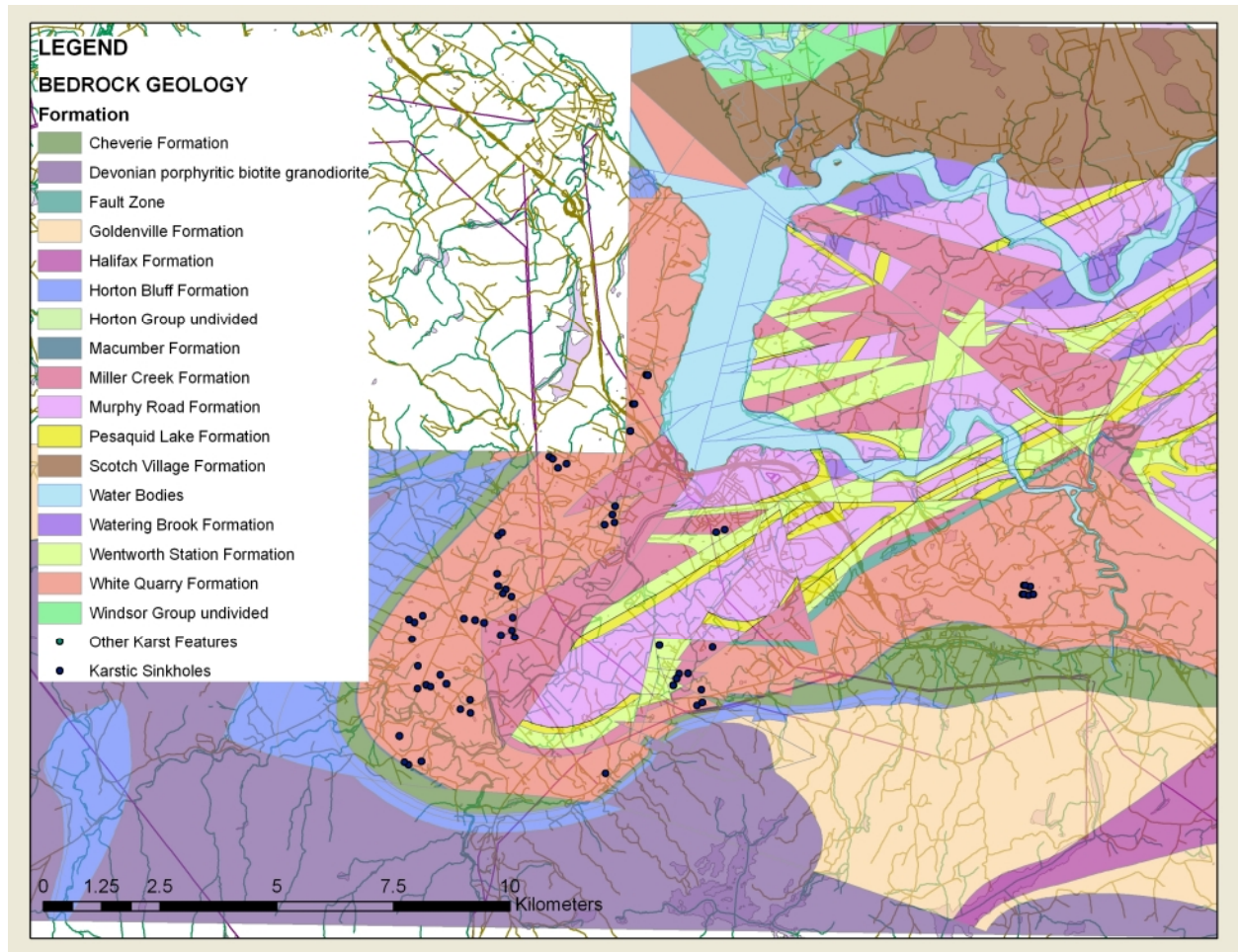


Figure 3.1: Bedrock Geology in Hants West Region

Karst features are concentrated in the areas underlain by the White Quarry Formation. White Quarry bedrock is described as anhydrite with minor dolostone and salt. The following formations are also composed primarily of gypsum and anhydrite, the rock types which most commonly result in sinkholes in Nova Scotia:

1. Wentworth Station Formation: gypsum, minor siltstone, limestone, dolostone, and the following sequence of carbonate rocks: North 60 Dolostone N60, Dimock Limestone D, Phillips Limestone P, St. Croix Limestone StC

²⁶ Ibid, p. 95.

2. Miller Creek Formation: gypsum, minor siltstone, limestone, dolostone, and following sequence carbonate and a siltstone bed: Sandford Lmst S, Big Red Sltst BRSlt, Chambers Lmst C, Belmont Lmst B, Mantua Lmst Man, Fisher Lmst F, McCulloch Dolst McC

There are two other formations observed in the study area. These rock types are composed primarily of siltstone with minor gypsum or limestone, resulting in a lesser tendency to form karst features:

- Pesaquid Lake Formation: siltstone and the following sequence of limestones: Lebreau L, Pesaquid Psq; and
- Murphy Road Formation: siltstone, minor gypsum and the following sequence of limestones: Kennetcook K, Wallace Point WP, Meander River MR, Avon A, Brooklyn Station BS, Herbert River HR.

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Chapter 4 Initial Site Selection

4.1 Highway Exits

Excellent transportation linkages are a critical quality of any business park. Highway 101 traverses the western region of Hants. Six highway exits afford convenient access to the region, all of which provide the opportunity for excellent connectivity to a potential new business park.

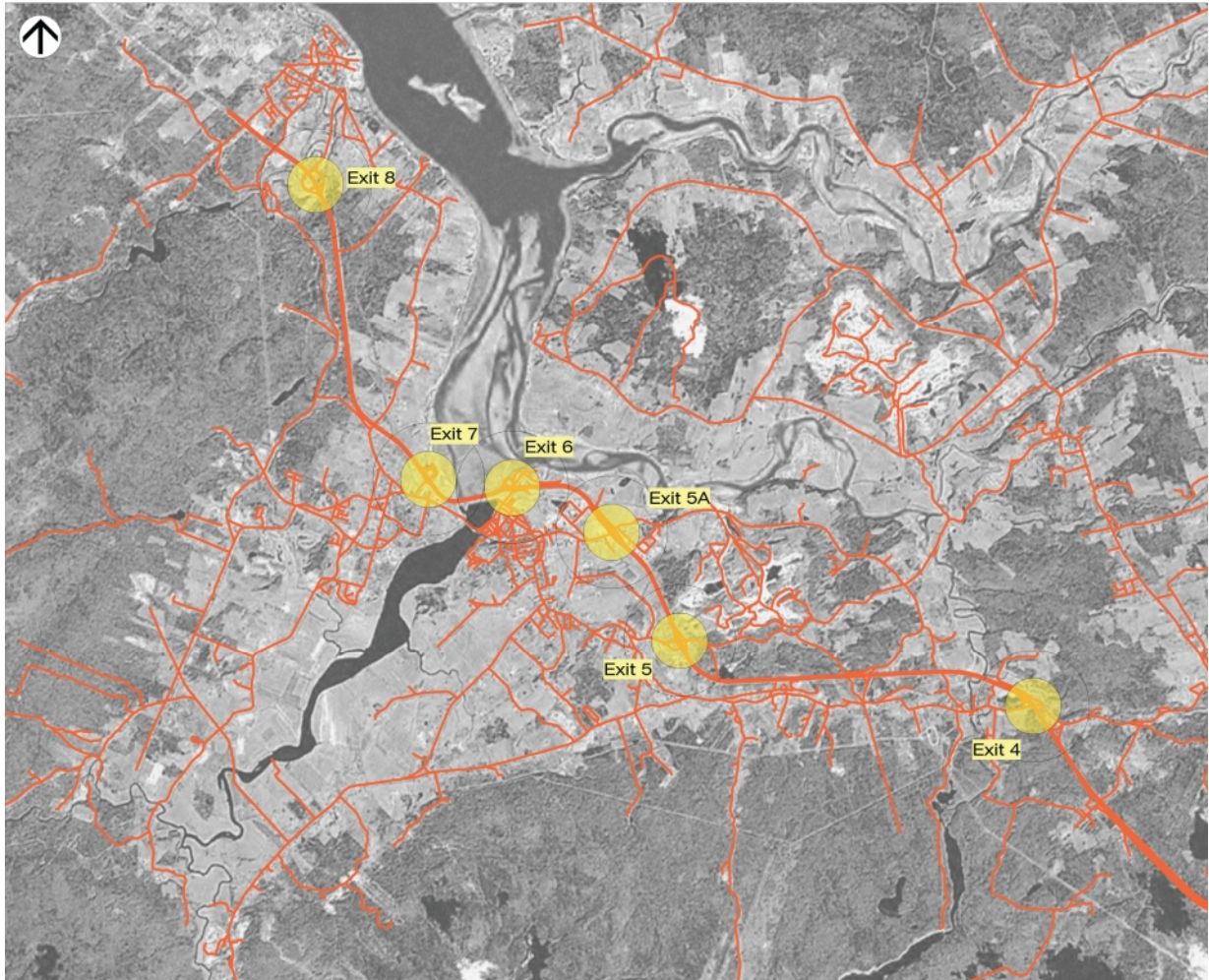


Figure 4.1: Highway Exits within Hants West Region

4.2 Industrial Park Suitability Analysis

Computer-based suitability analysis can determine the best potential locations for the development of a joint industrial park. Suitability analysis determines the fitness of a given tract of land for a defined use.

Generally, future industrial lands should consist of poor agricultural lands, level topography, good access to hard surfaced roads, dry soils, insignificant woodlands, excellent transportation linkages in every direction and should be relatively isolated from concentrated residential land uses. As noted in the table below, criteria fall into one of three categories:

- Environmental Perspective;

- Development Perspective; and
- Community Perspective.

General Industrial Suitability			
	Best	Middle	Worst
Environmental Perspective			
Soils	Dry	Imperfectly Drained	Wet
Slope	0-5%	5-15%	>15%
Vegetation	Disturbed or scrubby	Immature Forest	Mature Forest
Land Capability for Agriculture	No Capacity for Agriculture	Moderate to Severe Limitations to Agriculture	Minor Limitations to Agriculture
Development Perspective			
Distance to Major Road	Within 200 m	200-400 m	> 400 m
Distance to Highway Exit	Within 1 km	1– 2 km	>3 km
Distance to Central Services	Within 1 km	1 – 2 km	> 2 km
Visibility from Highway 101	Within 100 m	100-300 m	>300 m
Distance to Major Power Line	Within 50 m	50 -500 m	> 500 m
Community Perspective			
Setback from Residential / Recreational / Institutional Uses (Building Footprints)	>500 m	250-500 m	<250 m
Proximity to existing industrial development	Within 50 m	50 - 500 m	> 500 m

Unsuitable Areas
Waterbodies, watercourses and wetlands with 20m buffers Windsor town core Dykelands Open Space zones Recreational areas Institutional zones Power line corridors Railway corridors Coastal habitat

Unfortunately, it was not possible to obtain information on the location of potential sinkholes, which could impact the suitability of a particular site for development.

Figure 4.2 is a synthesis of these factors. It provides a relative comparison of the land’s physical capability to support industrial development for all lands within a 3 km distance from Highway 101 in the Hants West region. Mapping of individual suitability criteria can be found in Appendix A.

Based on a review of the suitability analysis, locations along Highway 101 are more suitable for the development of an industrial park than other locations in the study area. Areas adjacent to exits 5, 5a and 7 appear to be the most suitable, although an area further from Highway 101, south of Three Mile Plains and further east along Highway 101, where unfortunately there is no highway exit, appear to have some highly suitable lands as well. Given that easy highway access is very important to the success of a park, the analysis provided below focuses on lands adjacent to a highway interchange.

4.3 Potential Industrial Park Sites

Figure 4.3 through 4.8 depict 10 different opportunity sites situated close to Highway 101 exits. Pros and cons for each individual site are summarized below.

4.3.1 Highway Exit 4

Located in Municipality of the County of West Hants (Figure 4.3):

Site 1A : Evangeline Trail / Hartville Road	
Pros	Cons
<ul style="list-style-type: none"> • High visibility • Easy access to Highway 101 • No need to drive through residential area to access site • Lots of room for expansion • Only one land owner with whom to negotiate land sale 	<ul style="list-style-type: none"> • Currently zoned Agricultural Priority 3 (land with a lower productive capability – CLI Class 4) - would require rezoning to allow full industrial development • Highly visible location could negatively affect rural character of the area • No central services in immediate area

Located in Municipality of the County of West Hants:

Site 1B : Rocks Road	
Pros	Cons
<ul style="list-style-type: none"> • Potential exists to create high visibility • No need to drive through residential area to access site • Lots of room for expansion • Only one land owner with whom to negotiate land sale 	<ul style="list-style-type: none"> • Difficult access to and from Highway 101 • Currently zoned Agricultural Priority 2 (land with a high productive capability – CLI Classes 2 and 3) - would require rezoning of agricultural land and would open up a new previously undisturbed area to development • Highly visible location could negatively affect rural character of the area • No central services in immediate area

4.3.2 Highway Exit 5

Located in Municipality of the County of West Hants (Figure 4.4):

Site 2A : Highway 14 west of Highway 101	
Pros	Cons
<ul style="list-style-type: none"> • High visibility • Easy access to Highway 101 • Some room for expansion • Multiple private land owners – land assembly required • Large portions zoned Resource Industrial, Highway Commercial, General Commercial • Site is in close proximity to central services 	<ul style="list-style-type: none"> • Close to residential uses • Partially zoned Two Unit Residential - would require rezoning

Located in Municipality of the County of West Hants (Figure 4.4):

Site 2B : Highway 14 east of Highway 101	
Pros	Cons
<ul style="list-style-type: none"> • High visibility • Easy access to Highway 101 • Opportunity for future reuse of gypsum mine lands²⁷ • Lots of room for expansion if gypsum mine site can be used • Some land owned by Municipality of West Hants; only two other land owners • Portion south of Highway 14 is zoned Highway Commercial Site is close to central services although a highway crossing through the underpass would be required 	<ul style="list-style-type: none"> • Business park would be divided by Highway 14 • Portion north of Highway 14 is zoned Mineral Resource - would require rezoning • Too small an area for total build out if portion north of Highway 14 cannot be used

4.3.3 Highway Exit 5A

Located in Municipality of the County of West Hants (Figure 4.5):

Site 3A : Wentworth Road east of Highway 101	
Pros	Cons
<ul style="list-style-type: none"> • Expansion of existing business park • Designated in MPS for expansion of municipal services • High visibility • Easy access to Highway 101 • Some room for expansion • Only one land owner with whom to negotiate land sale • Portion of area Partially zoned Wentworth Road Commercial (Windsor) 	<ul style="list-style-type: none"> • Site may not become available depending on future of gypsum mine • Portion of area zoned Mineral Resource - would require rezoning

²⁷ West Hants MPS states that “it is important to West Hants to work with Fundy Gypsum and other mining companies to promote the reclamation of closed mine sites”. Section 3.6.2

Partially located in Town of Windsor and Municipality of the County of West Hants:

Site 3B : Wentworth Road west of Highway 101	
Pros	Cons
<ul style="list-style-type: none"> • Easy access to Highway 101 • Next to highway commercial development • Some room for expansion • Only one land owner with whom to negotiate land sale • Partially zoned Wentworth Road Commercial (Windsor) • Site is in close proximity to central services 	<ul style="list-style-type: none"> • Set back from Highway 101 • Portion of site close to residential uses • Partially zoned Agriculture (Windsor) and Agricultural Priority 3 (West Hants) - would require rezoning

4.3.4 Highway Exit 6

Located in Town of Windsor (Figure 4.6):

Site 4A and 4B : Colonial Road north of Highway 101	
Pros	Cons
<ul style="list-style-type: none"> • High visibility • Relatively easy access to Highway 101 • Close to downtown Windsor • Remediation of contaminated site for industrial use • Potential to continue efforts of stalled Mill Islands development, albeit as a light industrial condominium rather than residential • Zoned Light Industrial General and Highway Commercial • Site is very close to central services 	<ul style="list-style-type: none"> • Too small – cannot accommodate projected land demand • Divided into two sites separated by a non-developable area • Portion 4B is in the midst of residential development and access to portion 4A is through a residential area

4.3.5 Highway Exit 7

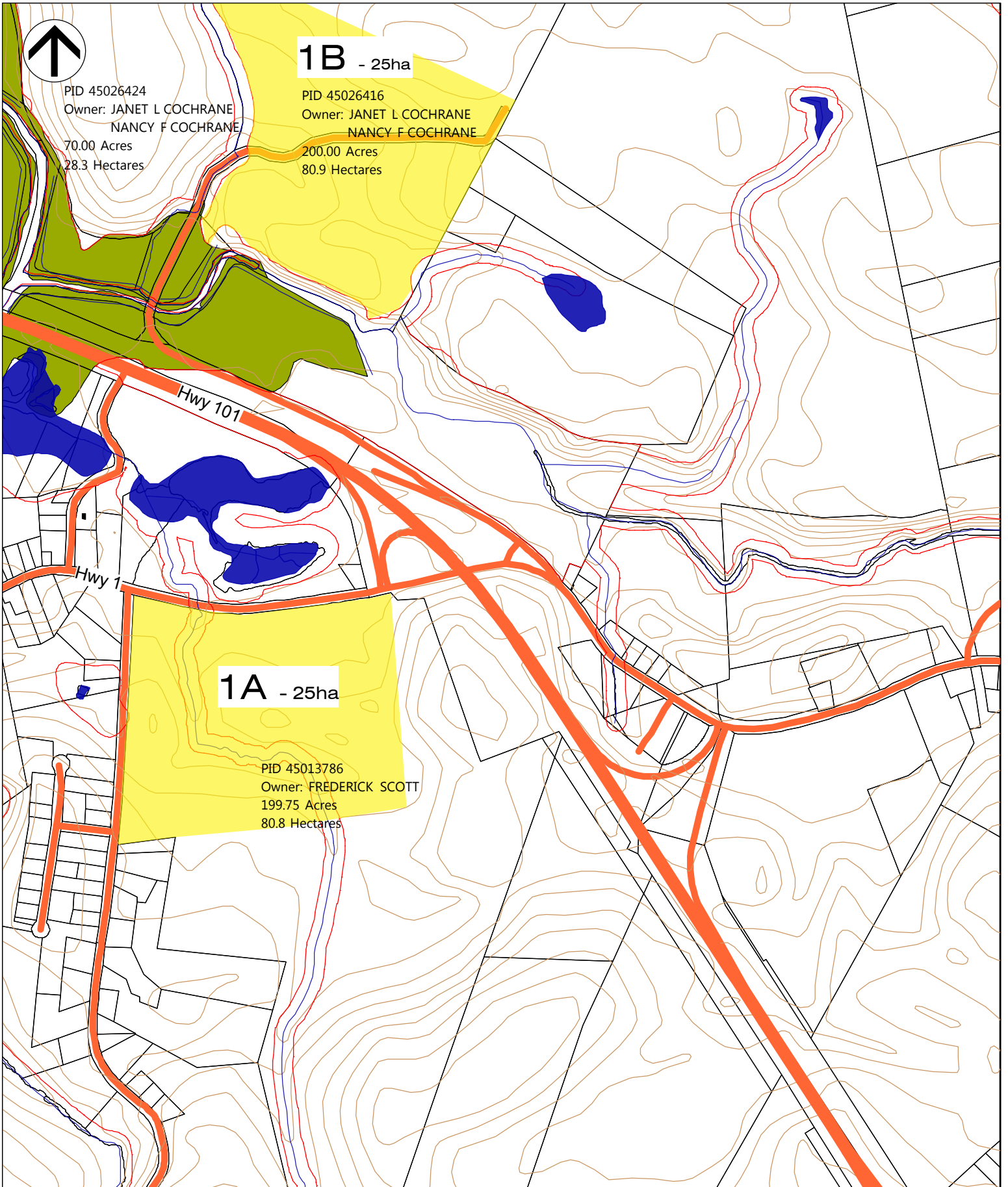
Located in Municipality of the County of West Hants (Figure 4.7):

Site 5A : Evangeline Trail / Falmouth Connector west of Highway 101	
Pros	Cons
<ul style="list-style-type: none"> • Excellent frontage along Highway 101 • Relatively easy access to Highway 101 • Only two land owners with whom to negotiate land sale • Partially zoned General Commercial • Site is immediately adjacent to central services 	<ul style="list-style-type: none"> • MPS intends development which maintains “quiet, rural atmosphere” • Too small – cannot accommodate total projected land demand • Backs on residential uses • Fragmented by rail right-of-way and residential development • Large portions zoned Two Unit Residential, and Prime Agricultural, which would require rezoning

4.3.6 Highway Exit 8

Located in Municipality of the County of West Hants (Figure 4.8):

Site 6A : West of exit from Highway 101	
Pros	Cons
<ul style="list-style-type: none">• Good visibility• Highway exit ramp could be extended to create access road• Lots of room for expansion• Relatively easy access to Highway 101• Local access can also be created off Bog Road• Only one land owner with whom to negotiate land sale for lands initially required• Zoned General Resource, which allows Council to consider rezoning to Resource Industrial (M-1)	<ul style="list-style-type: none">• Northern portion located at low elevation near river – potential flood risk• May threaten character of river valley• Portions of site are separated by steep slopes• No central services in immediate area



1B - 25ha

PID 45026424
 Owner: JANET L COCHRANE
 NANCY F COCHRANE
 70.00 Acres
 28.3 Hectares

PID 45026416
 Owner: JANET L COCHRANE
 NANCY F COCHRANE
 200.00 Acres
 80.9 Hectares

1A - 25ha

PID 45013786
 Owner: FREDERICK SCOTT
 199.75 Acres
 80.8 Hectares

West Hants Business Park Feasibility Study

Opportunity Site 1: Highway Exit 4

Figure 4.3

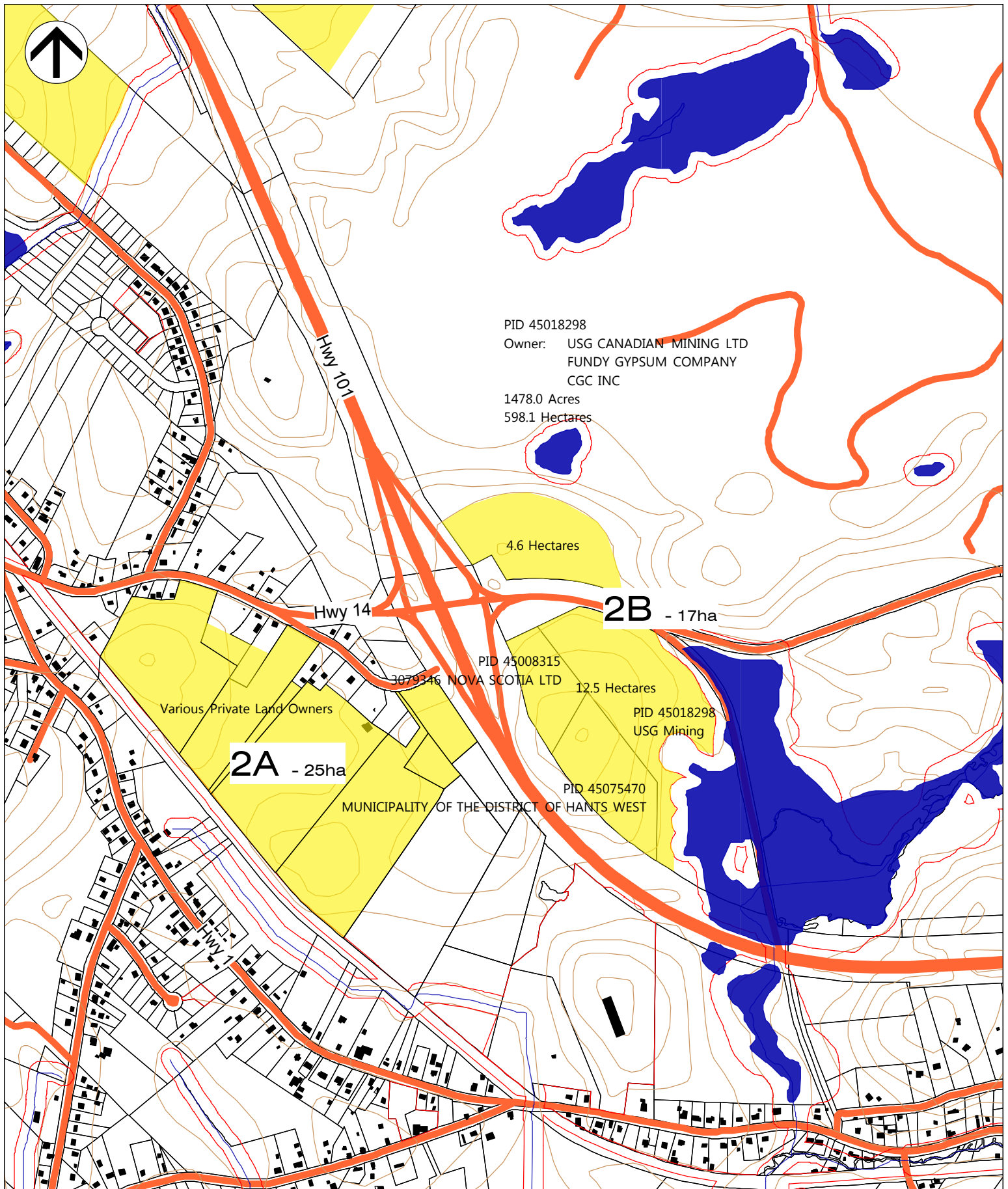
Project: 101204
 Date: February 2010

- Dykelands
- Other No-Go Areas



Scale: 1:10000





West Hants Business Park Feasibility Study

Opportunity Site 2: Highway Exit 5

Figure 4.4

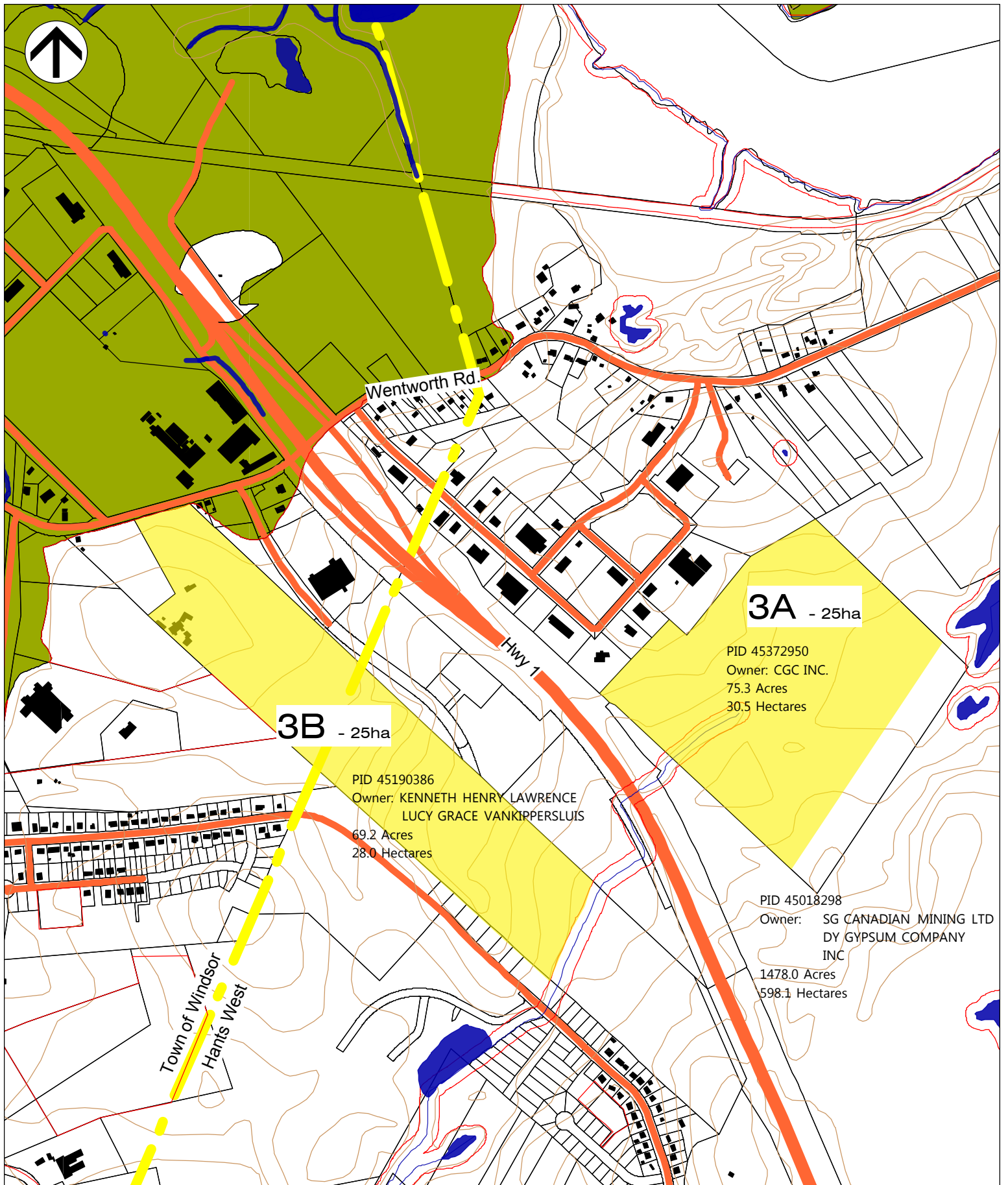
Project: 101204
 Date: February 2010

- Dykelands
- Other No-Go Areas



Scale: 1:10000





West Hants Business Park Feasibility Study

Opportunity Site 3: Highway Exit 5A

Figure 4.5

Project: 101204
 Date: February 2010

Dykelands
 Other No-Go Areas

0 200 500 m

Scale: 1:10000





PID 45056447
 Owner: MILL ISLAND LIMITED
 6.0 Acres
 2.4 Hectares
 (portion thereof on dykelands)

PID 45056587
 Owner: COLONIAL DEV LTD
 8.0 Acres
 3.2 Hectares
 (portion thereof on dykelands)

PID 45056561
 Owner: IRVING OIL COMPANY LIMITED
 16.7 Acres
 6.8 Hectares
 (portion thereof on dykelands)



West Hants Business Park Feasibility Study

Opportunity Site 4: Highway Exit 6

Figure 4.6

Project: 101204
 Date: February 2010

- Dykelands
- Other No-Go Areas

0 200 500 m

Scale: 1:10000





West Hants Business Park Feasibility Study

Opportunity Site 5: Highway Exit 7

Figure 4.7

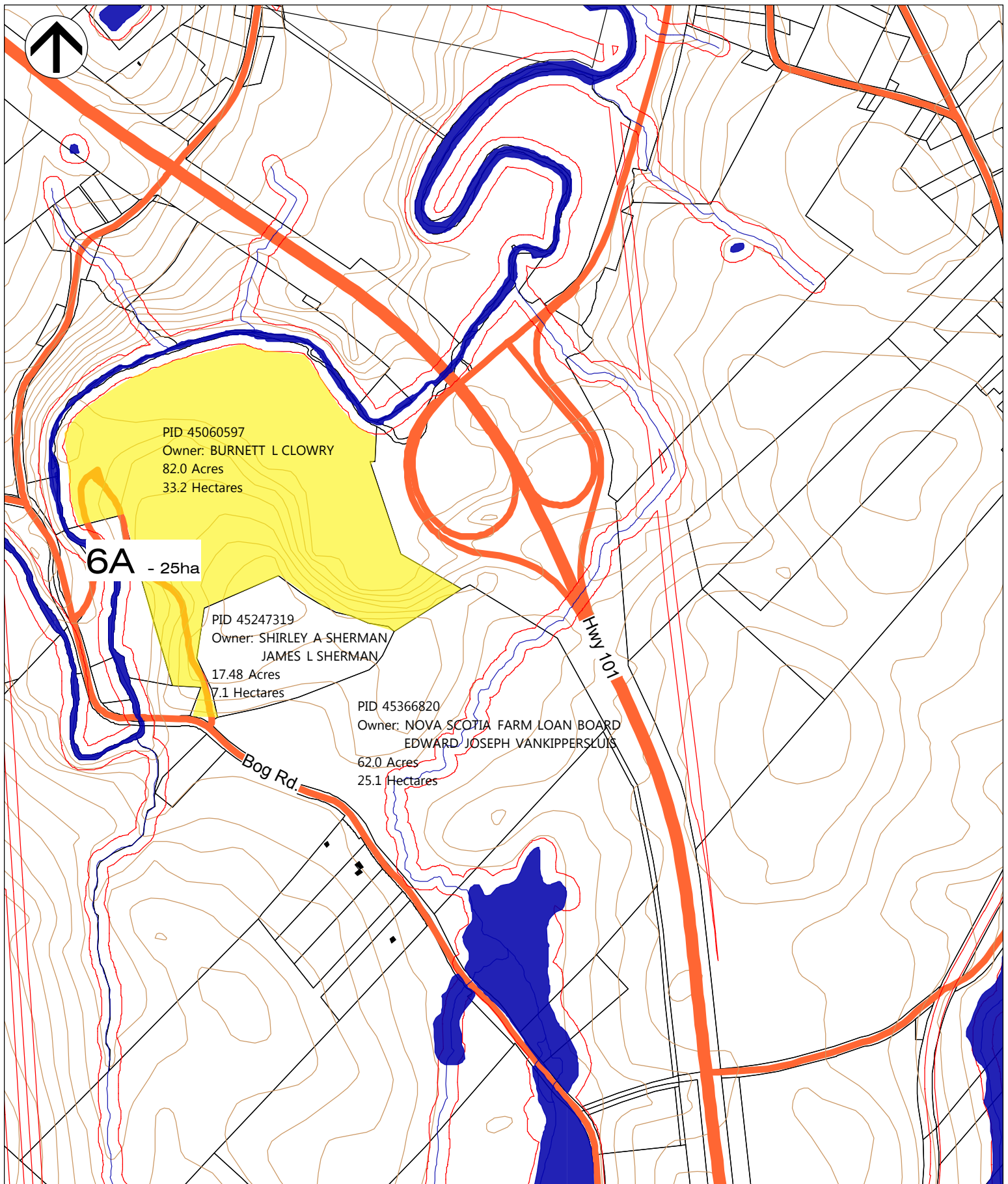
Project: 101204
Date: February 2010

- Dykelands
- Other No-Go Areas

0 200 500 m

Scale: 1:10000





West Hants Business Park Feasibility Study

Opportunity Site 6: Highway Exit 8

Figure 4.8

Project: 101204
 Date: February 2010

- Dykelands
- Other No-Go Areas

0 200 500 m

Scale: 1:10000



5.1 Preferred Site

Over the course of this project, the consultation process and discussions with the Client revealed another possible development site, which was not included in the initial selection of opportunity sites. The site is located in the Town of Windsor, adjacent to Exhibition Park and is bounded by Wentworth Road, Centennial Drive, Tregothic Drive and Industrial Drive (see Figure 5.1).

A number of factors have influenced the decision to choose this area as the preferred development site:

- It is understood that the current landowner is willing to sell off a portion of their land;
- the low development cost due to existing services in the area; and
- the benefit of a logical expansion of the existing Windsor Industrial Park.

While this site cannot fully accommodate the land demand projected by the high growth scenario (13.9 ha until 2031), it can satisfy the land demand projected by the mid-growth scenario (7.3 ha until 2031). Land demand under the high growth scenario can be almost fully accommodated until 2026 (7.6 ha). If a high growth scenario is achieved additional land will need to be brought on stream. Possible sites for this expansion are described in Section 5.3.

5.1.1 Property Owners and Zoning

The 12.7 ha parcel (PID 45055498) is under ownership of the Windsor Agricultural Centre. The development area is located within the Town of Windsor by-law area and is currently zoned FG (Fair Ground).

The area also falls within a Special Overlay Zone titled Environmental Constraints. This is in essence an overlay generally used to prevent development on low-lying dyke lands. However, large portions of the Environmental Constraints Zone within the Town of Windsor fall within a variance overlay issued by the Province (Figure 5.2). Council can allow development within those variance areas provided an environmental study is submitted which identifies constraints to construction at the site (Policy 12.0.3. Town of Windsor MPS).

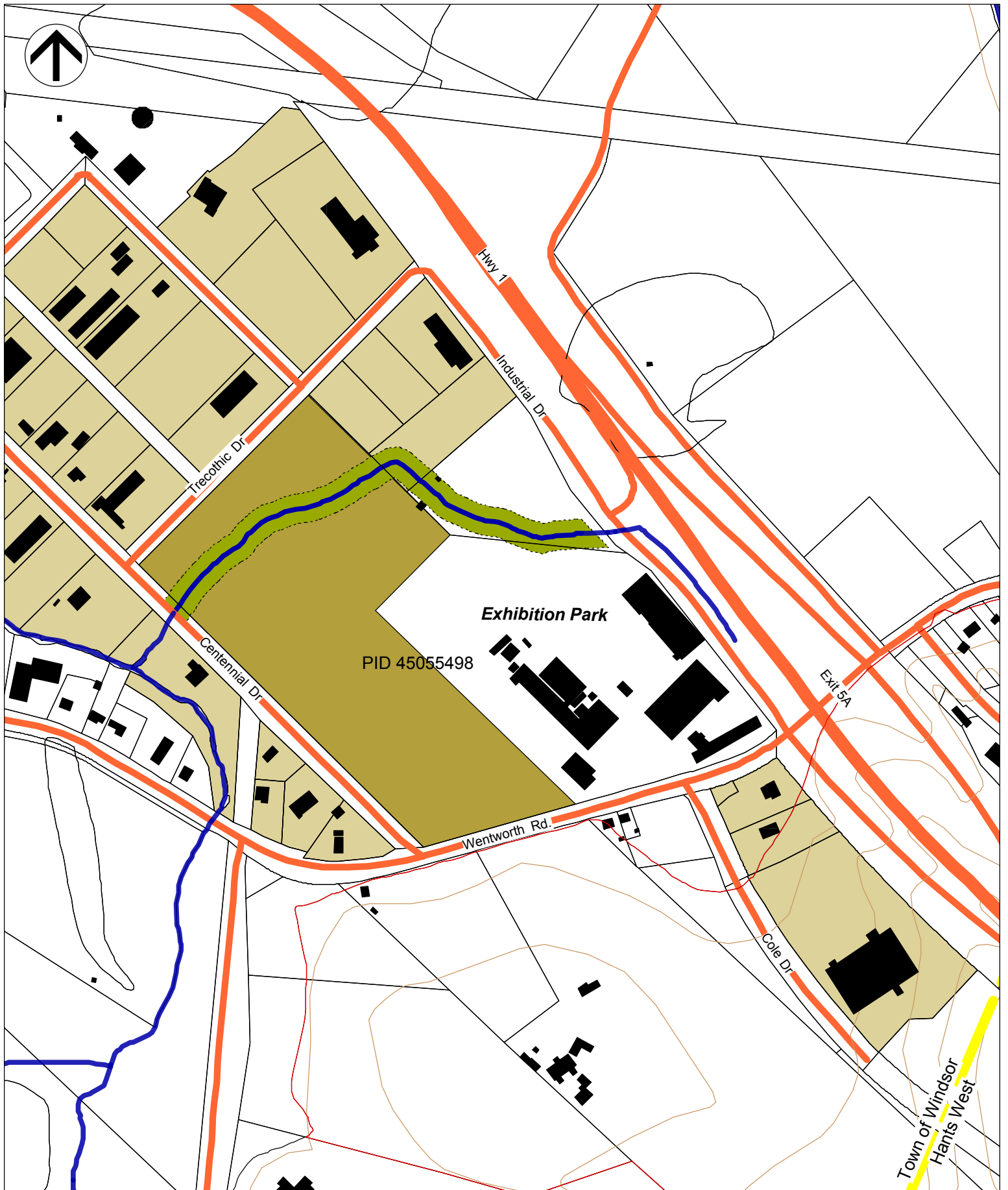
5.1.2 Surrounding Land Uses

The preferred business park site is in large part surrounded by the existing Windsor Industrial Park, namely along Centennial Drive and Tregothic Drive. The existing Exhibition Park would be retained along with the waterslide on Industrial Drive. The area directly across Wentworth Road is largely undeveloped and currently zoned WR-C (Wentworth Road Commercial), while the area between Highway 1 and Cole Drive is developed and zoned LI-3 (Joint Industrial Type Three).

5.1.3 Existing Services

5.1.3.1 WATER

The town's source of water supply is Mill Lake, located 9 km to the south of town. Water at the treatment plant is chlorinated, filtered and pH adjusted with lime treatment, and soda ash for post filter pH



West Hants Business Park Feasibility Study

Preferred Business Park Site

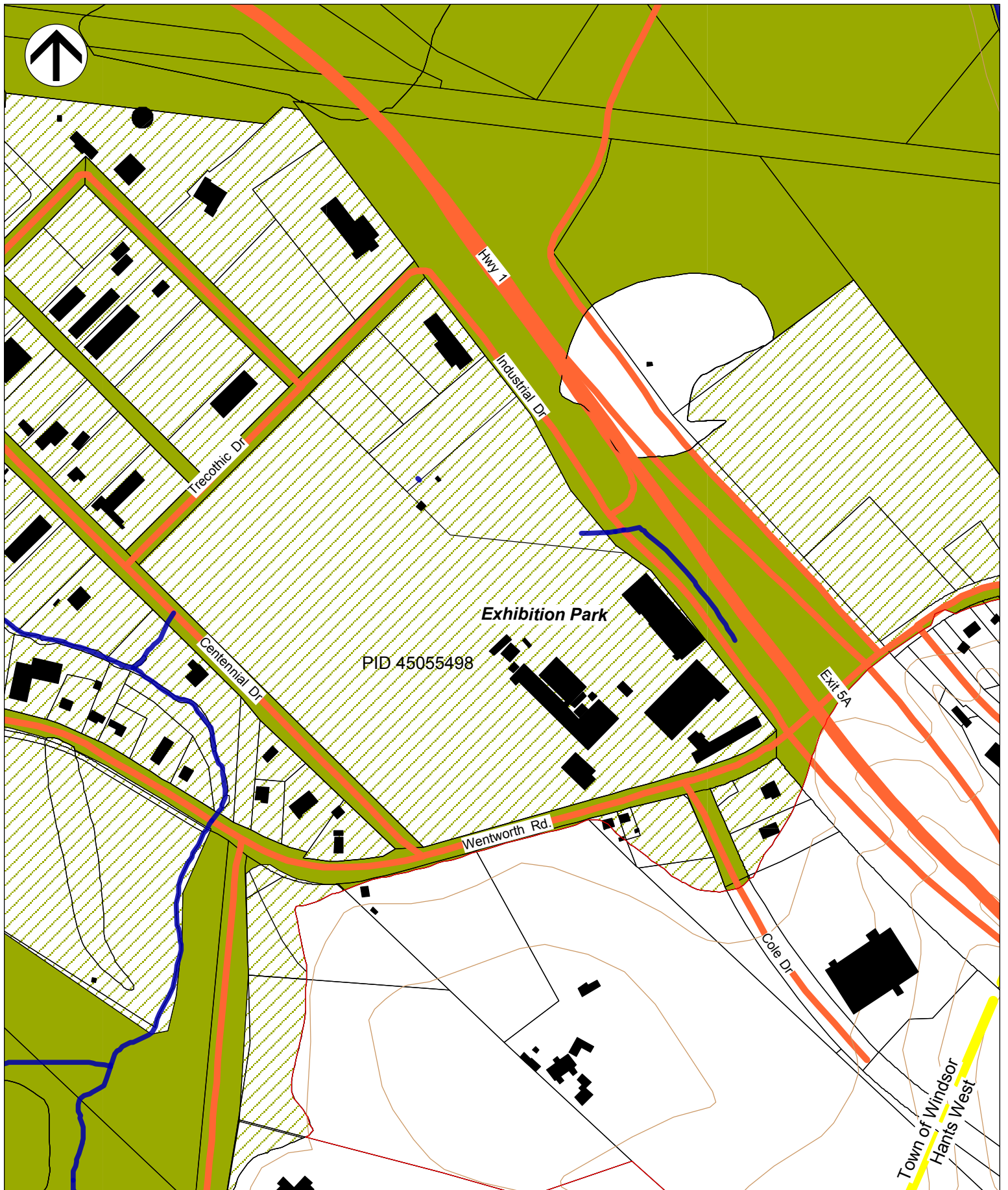
Project: 101204
Date: May 2010

- Existing Windsor Industrial Park
- Possible New Business Park Development

Figure 5.1

0 50 100 m

Scale: 1:5000

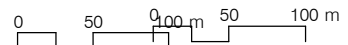


West Hants Business Park Feasibility Study

Environmental Constraints Overlay

Project: 101204
Date: May 2010

- Dykelands
- Dykelands with Variance



Scale: 1:5000

Figure 5.2



Town of Windsor
Hants West

adjustment. This source is more than adequate to supply present maximum daily demand of the existing Windsor Industrial Park.

The current capacity of the system is 1.5 million gallons per day with present maximum daily demand of approximately 750,000 gallons per day. The park has 100 pounds of pressure per square inch (PSI).

The water storage system consists of a 400,000 gallon tank at the water treatment plant and a 310,000 standpipe for both the Windsor and Windsor-West Hants Industrial Park. The distribution system within the town consists of a looped network of 10 and 12 inch mains. The Windsor Industrial Park water main is 10 inches in diameter with 6 inch and 8 inch distribution lines.

5.1.3.2 SEWER AND STORM SEWER

Sewer lines in the Windsor Industrial Park are 10” in diameter, with a 30” sanitary trunk sewer line serving the town running along Centennial Drive. The sewage flows to a pumping station at the end of Centennial Drive, immediately adjacent to the lagoon. The Town of Windsor treats raw sewage at its aerated two-cell sewage treatment lagoon, immediately north of the park. The sewage lagoon provides an average 18 hour retention before the effluent is discharged into the St. Croix River. The lagoon’s treatment capacity is 900,000 GPD, with current demand averaging 340,000 GPD. Storm water in the older section of the Windsor Industrial Park north of Wentworth Road is collected through an open-ditch storm water system. The newer section of the park south of Wentworth Road has continuous concrete curbing and gutters for storm water collection, with 15” and 36” sewer mains.

5.1.4 Access

Access to the new business park would be available through Wentworth Road. The business park would be located about 400 meters west of Highway Exit 5A. Some lots would front directly on Wentworth Road, while the remainder would be accessed through road network of the existing Windsor Industrial Park, where all streets are paved with asphalt, have landscaped open ditches and compacted gravel shoulders. Street lighting is provided throughout the existing park.

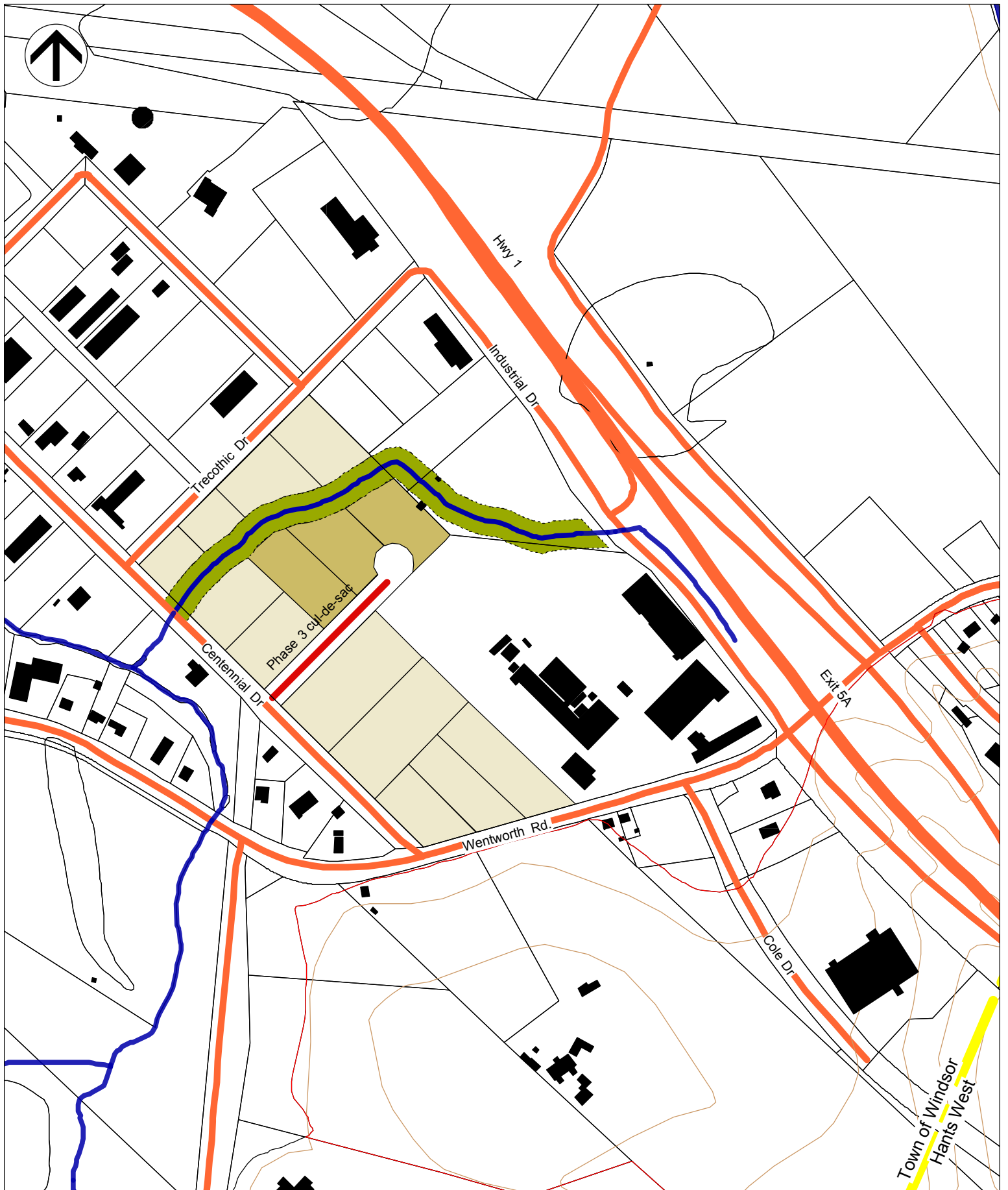
5.1.5 Phasing

The proposed phasing takes advantage of the existing road network and services (Figure 5.3). Lots with the highest street exposure at the corner of Wentworth Road and Centennial Drive and all other lots with street frontage and existing services would be developed in Phase 1 and would yield 5.7 hectares (14.0 acres) of land for sale. The lots in Phase 2 would be accessed by a 175 m long cul-de-sac, which has the potential to be extended and connected to Cole Drive, should the remaining Exhibition Park lands become available in the long-term future. Phase 2 adds 1.4 hectares (3.5 acres) to the business park.

When all three phases are completed, the new business park would provide 7.1 hectares (17.5 acres) of land for sale.

5.1.6 Karst Topography

By and large the Windsor – West Hants area is characterized by geological formations with Karst features (see also section 3.4 Geological Constraints). The preferred business park site is located in an area with



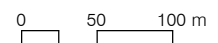
West Hants Business Park Feasibility Study

Conceptual Park Layout

Project: 101204
Date: April 2010

- Phase 1: 5.7 ha (14.0 ac)
- Phase 2: 1.4 ha (3.5 ac)

Figure 5.3



Scale: 1:5000



rock types that could result in sink holes. The geological formations found are the Wentworth Station Formation and the Miller Creek Formation (Figure 5.4). Geo-technical studies prior to the purchase of the land by the Client Group should assess the risk for sinkholes to occur.

5.2 Site Development Costs

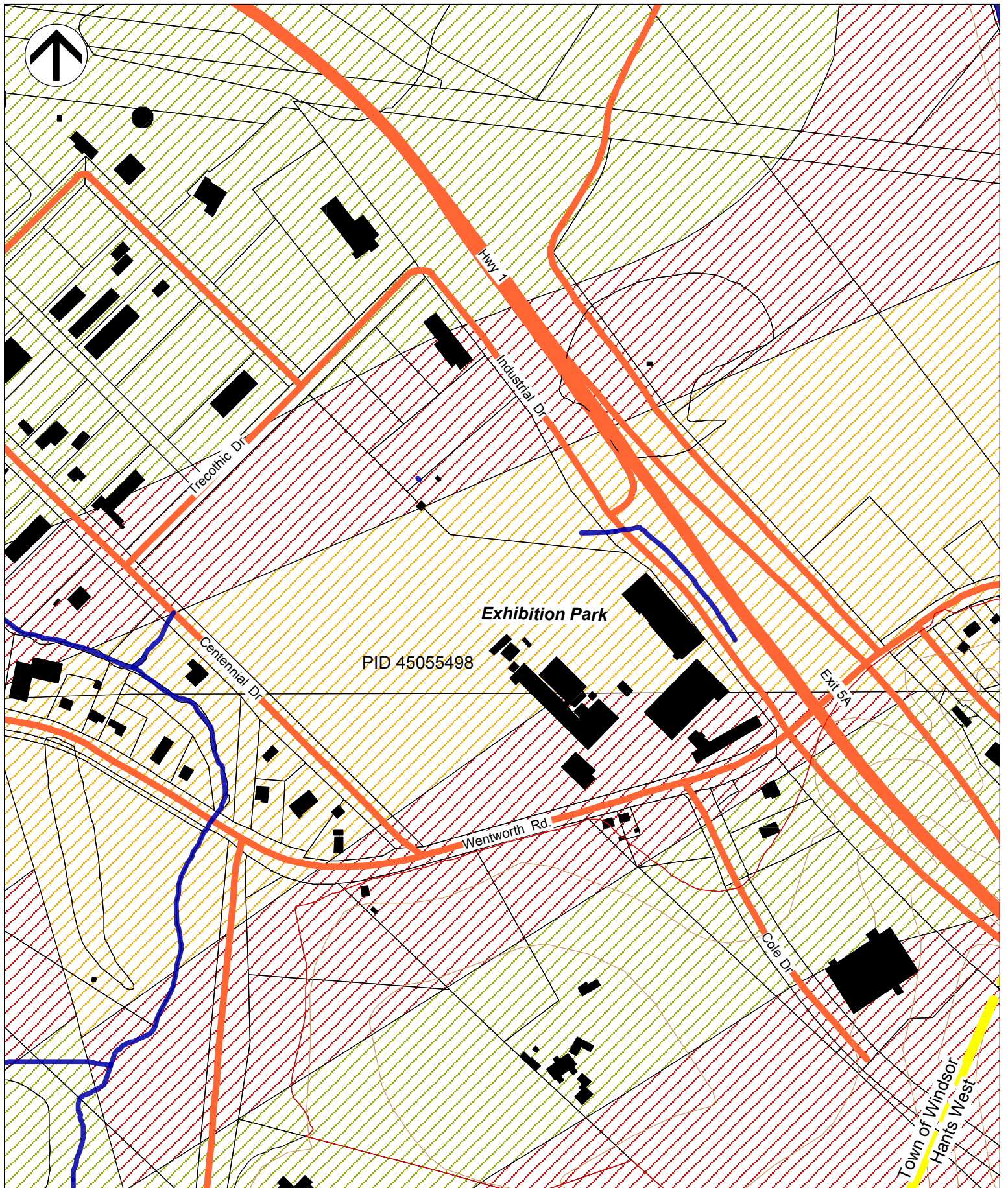
The preferred development site is in effect an extension of the older section of the Windsor Industrial Park north of Wentworth Road and takes advantage of existing water and sewer services of the surrounding roads. However, geotechnical conditions in this dyke lands area might cause additional land development costs. In addition to increased land preparation cost, an environmental study needs to be conducted pursuant to Policy 12.0.2 of the Town of Windsor Municipal Planning Strategy. The environmental study will describe the susceptibility of flooding, drainage problems, and the bearing capacity and suitability for construction of soils at the site, and will identify suitable construction methods, including flood-proofing measures, to overcome the constraints which are found to exist at the site.

Prior to purchasing the land from the current landowner, the Client Group should carry out the environmental study as required by the Municipal Planning Strategy to ensure that the land can be made suitable for business park development. This information will also provide data that will help to determine a reasonable purchase price. Also, if the environmental study is properly packaged, it could be given to prospective purchasers to provide them with useful information on constructing buildings in the area. The ability of the Client Group to provide such information will help to make the area more attractive to prospective tenants.

If the land is found suitable, it is recommended that the Client Group sells the land in as-is condition to interested parties. The land buyers/developers would be fully responsible for site preparation (clearing, grubbing, grading and foundations).

Table 5.1: Opinion of Probable Construction Costs

<i>Item</i>	<i>Total 7.1ha Construction Cost</i>	<i>Phase 1 5.7ha Construction Cost (\$)</i>	<i>Phase 2 1.4ha Construction Cost</i>
Roads with Sod Ditches	\$170,000	N/A	\$170,000
Watermain	\$80,000	N/A	\$80,000
Sanitary sewer	\$70,000	N/A	\$70,000
Power	\$150,000	N/A	\$150,000
Contingency	\$117,500	N/A	\$117,500
Engineering	\$47,000	N/A	\$47,000
TOTAL (\$)	\$634,500	0	\$634,500



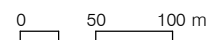
West Hants Business Park Feasibility Study

Bedrock Geology

Project: 101204
Date: May 2010

- | | |
|---|---|
|  Wentworth Station Formation |  Pesaquid Lake Formation |
|  Miller Creek Formation |  Murphy Road Formation |

Figure 5.4



Scale: 1:5000



5.3 Benefit/Cost Analysis

The benefit/cost analysis finds that to breakeven on their investment in the park expansion based on the money received from the sale of the land only, the Client Group would need to sell land for about \$314,765 (2009\$) per hectare (\$127,384 per acre) (see Table 5.2). The price per Ha for simple cost recovery covers the cost of raw land and estimated construction and operating costs.

Table 5.2: Development Costs

Item	Cost (2009\$)
Construction Costs	
Construction Costs	\$634,500
Land	\$179,199
Financing (interest)	\$391,724 to 20 year payout
Subtotal Construction Cost	\$1,205,423
Operating Costs	
Capital Replacement Fund	\$587,500, assumes 20 year capital life
Road Maintenance	\$142,755, 20 years
Administration, Promotion, Sales	\$825,000 to 2031
Subtotal Operating Costs	\$1,555,255
Total Costs	\$2,189,755
Price/ Ha - Simple Cost Recovery (land + construction cost + interest + admin., promotion, sales)	\$291,240

This price is above competing parks in the Annapolis Valley region²⁸ and provides a measure of the extent of the subsidy to business provided by industrial parks. Prices in more competitive markets do breach the \$300,000 per hectare range. For example, prices in the Burnside Industrial Park and the City of Lakes Business Park in Halifax are in the range of \$336,929 per ha (\$136,353 per acre).

However, we do not believe that the expanded park could sell land at the posted prices for parks in Metropolitan Halifax. For the purposes of this analysis, and based on comparisons with industrial park sales prices in the Valley region, we assume that the land in the expanded park will be sold at cost, which would be about \$23,579 per Ha. Tables 5.3, 5.4 and 5.5 show pricing land at the level would leave the expanded park in a negative cash position throughout its life.

The park expansion will hold about \$4,108,156 (2009\$) in taxable assessment by 2030 at which point under the mid growth scenario it will be fully occupied. For this analysis we assume that once the expansion reaches capacity (in 2023) the Client Group will then consider the advisability of further land acquisitions and capital investment.

We believe the majority of the revenue derived from the park would be incremental, that is, it would come from property tax revenues, spin-off effects on existing businesses, improved employment prospects; population attraction and retention, etc.

²⁸ The asking price of \$86,485 per hectare at the Annapolis Valley Regional Industrial Park.

Table 5.3: Benefit/Cost Analysis (2009\$) Land Development, Sales and Assessment

Year	Area (ha)			Annual Land Sales & Vacant for Sale				Park Expansion Taxable Assess.
	Developed *	Net **	Land Reserve for Future Development	Goods Producing	Service Producing	Total Annual	Vacant	
2010	0.0	0.0	0.0	-	-	0.0		\$ -
2011	0.0	0.0	0.0	-	-	0.0		\$ -
2012	0.0	0.0	0.0	-	-	0.0		\$ -
2013	0.0	0.0	0.0	-	-	0.0		\$ -
2014	0.0	0.0	0.0	-	-	0.0		\$ -
2015	5.7	5.7	1.9	-	-	0.0	5.7	\$ -
2016	5.7	5.7	1.9	-	-	0.0	5.7	\$ -
2017	5.7	5.7	1.9	0.05	0.40	0.44	5.3	\$ 260,292
2018	5.7	5.7	1.9	0.05	0.40	0.44	4.8	\$ 520,583
2019	5.7	5.7	1.9	0.05	0.40	0.44	4.4	\$ 780,875
2020	5.7	5.7	1.9	0.05	0.40	0.44	3.9	\$ 1,041,166
2021	5.7	5.7	1.9	0.05	0.40	0.44	3.5	\$ 1,301,458
2022	5.7	5.7	1.9	0.05	0.45	0.50	3.0	\$ 1,597,341
2023	5.7	5.7	1.9	0.05	0.45	0.50	2.5	\$ 1,893,225
2024	5.7	5.7	1.9	0.05	0.45	0.50	2.0	\$ 2,189,108
2025	5.7	5.7	1.9	0.05	0.45	0.50	1.5	\$ 2,484,992
2026	7.6	7.1	1.9	0.05	0.45	0.50	2.4	\$ 2,780,875
2027	7.6	7.1	0.0	0.05	0.51	0.56	1.8	\$ 3,112,696
2028	7.6	7.1	0.0	0.05	0.51	0.56	1.3	\$ 3,444,516
2029	7.6	7.1	0.0	0.05	0.51	0.56	0.7	\$ 3,776,336
2030	7.6	7.1	0.0	0.05	0.51	0.56	0.1	\$ 4,108,156
2031	7.6	7.1	0.0	-	-	0.0	0.1	\$ 4,108,156
22 Year Total				0.7	6.3	7.0		

* Developed includes area for occupancy plus area for roads, sidewalks, utilities, buffers and open space.

** Net includes area for occupancy.

Source: *Jozsa Management & Economics*

As the tables below show, the tax and other revenues earned due to the park expansion would offset the negative cash position of the expanded park. Table 5.3 provides details on the development schedule for the park expansion, projected land sales and taxable assessment.

The calculations are based on the following assumptions:

- The demand for land from 2007 to 2031 inclusive will be as shown in Table 2.12;
- 3.9 ha of vacant land in the Windsor-West Hants Industrial Park will be sold before an expansion is undertaken;
- 7.6 ha will be purchased (we assume the ‘fairgrounds’ land, for expansion of which;
 - 7.1 ha available for sale,
- By 2030, no land will be left for sale in the expansion;
- Sales will begin at about 0.44 ha/year in 2017, rise to about 0.50 ha/year by 2022, rise further to about 0.56ha/year by about 2027 and fall to 0.0 ha/year in 2031 when the expansion is fully occupied;
- The park will be developed in two stages;

- Stage 1 will see the purchase of 7.6 ha (which is the recommended parcel at the Fairgrounds), which should be fully occupied by about 2030;
- Stage 2 would be undertaken at about 2030, after consideration of the prospects for further growth and the development costs of further expansion;
- The lot coverage ratios will be about:
 - 12.6% for goods producing business;
 - 22.1% for service producing businesses;
- Taxable assessment, on a square metre of lot basis will be about:
 - \$54.07 for goods producing businesses (which implies that the land is assessed at about 75.8% of its market price and the buildings are assessed at about \$75.00 per square metre); and
 - \$59.48 for service producing businesses (which implies that the land is assessed at about 75.8% of its market price and the buildings are assessed at about \$107.95 per square metre).

Based on the projections of employment and demand for industrial/commercial park land, we project that by 2030 the park will have sold 7.0 ha and will have a taxable assessment value of about \$4,108,156 (2009\$). About 0.1 ha will be vacant.

Table 5.4 shows the schedule for capital investments and the annual costs and benefits directly associated with the expanded park. These results are based on the following assumptions:

- The total capital cost will be \$813,699 (2009\$) as per Table 5.2.
- The park will be financed with 100% debt.
 - The all-in borrowing rate is assumed to be 4.25%, which is approximately the current rate offered by the Nova Scotia Municipal Finance Corporation.
 - The debt will be amortised over 20 years.
 - Blended payments of principal and interest will be made twice yearly.
- Incremental operating costs will be composed of;
 - road maintenance,
 - payment into a capital replacement fund, which assumes a 20 year useful life for the infrastructure, and
 - administration, promotion and selling costs of \$37,500 per year.
- Land will be priced at \$23,579 per hectare, that is the approximate purchase cost to the Client Group.

Table 5.4: Benefit/Cost Analysis (2009\$) Park Expansion Costs and Benefits

Year	Costs						Benefits		Net Financial Benefits
	Capital Investment	Annual Cash Costs					Land Sales Rev.	Total Annual Benefits	
		Principal & Interest	Replace. Fund	Road Maint.	Admin, Promo., Sales	Total Costs			
2010	\$ -	\$ -	\$ -	\$ -	\$ 37,500	\$ 37,500	\$ -	\$ -	-\$ 37,500
2011	\$ -	\$ -	\$ -	\$ -	\$ 37,500	\$ 37,500	\$ -	\$ -	-\$ 37,500
2012	\$ -	\$ -	\$ -	\$ -	\$ 37,500	\$ 37,500	\$ -	\$ -	-\$ 37,500
2013	\$ -	\$ -	\$ -	\$ -	\$ 37,500	\$ 37,500	\$ -	\$ -	-\$ 37,500
2014	\$ -	\$ -	\$ -	\$ -	\$ 37,500	\$ 37,500	\$ -	\$ -	-\$ 37,500
2015	\$ 179,199	\$ 13,273	\$ -	\$ -	\$ 37,500	\$ 50,773	\$ -	\$ -	-\$ 50,773
2016	\$ -	\$ 13,273	\$ -	\$ -	\$ 37,500	\$ 50,773	\$ -	\$ -	-\$ 50,773
2017	\$ -	\$ 13,273	\$ -	\$ -	\$ 37,500	\$ 50,773	\$ 10,419	\$ 10,419	-\$ 40,354
2018	\$ -	\$ 13,273	\$ -	\$ -	\$ 37,500	\$ 50,773	\$ 10,419	\$ 10,419	-\$ 40,354
2019	\$ -	\$ 13,273	\$ -	\$ -	\$ 37,500	\$ 50,773	\$ 10,419	\$ 10,419	-\$ 40,354
2020	\$ -	\$ 13,273	\$ -	\$ -	\$ 37,500	\$ 50,773	\$ 10,419	\$ 10,419	-\$ 40,354
2021	\$ -	\$ 13,273	\$ -	\$ -	\$ 37,500	\$ 50,773	\$ 10,419	\$ 10,419	-\$ 40,354
2022	\$ -	\$ 13,273	\$ -	\$ -	\$ 37,500	\$ 50,773	\$ 11,840	\$ 11,840	-\$ 38,934
2023	\$ -	\$ 13,273	\$ -	\$ -	\$ 37,500	\$ 50,773	\$ 11,840	\$ 11,840	-\$ 38,934
2024	\$ -	\$ 13,273	\$ -	\$ -	\$ 37,500	\$ 50,773	\$ 11,840	\$ 11,840	-\$ 38,934
2025	\$ -	\$ 13,273	\$ -	\$ -	\$ 37,500	\$ 50,773	\$ 11,840	\$ 11,840	-\$ 38,934
2026	\$ -	\$ 13,273	\$ -	\$ -	\$ 37,500	\$ 50,773	\$ 11,840	\$ 11,840	-\$ 38,934
2027	\$ 634,500	\$ 60,271	\$ 29,375	\$ 7,138	\$ 37,500	\$ 134,284	\$ 13,272	\$ 13,272	-\$ 121,012
2028	\$ -	\$ 60,271	\$ 29,375	\$ 7,138	\$ 37,500	\$ 134,284	\$ 13,272	\$ 13,272	-\$ 121,012
2029	\$ -	\$ 60,271	\$ 29,375	\$ 7,138	\$ 37,500	\$ 134,284	\$ 13,272	\$ 13,272	-\$ 121,012
2030	\$ -	\$ 60,271	\$ 29,375	\$ 7,138	\$ 37,500	\$ 134,284	\$ 13,272	\$ 13,272	-\$ 121,012
2031	\$ -	\$ 60,271	\$ 29,375	\$ 7,138	\$ 37,500	\$ 134,284	\$ -	\$ -	-\$ 134,284
22 Year Total	\$ 813,699	\$ 460,636	\$ 146,875	\$ 35,689	\$ 825,000	\$ 1,468,200	\$ 164,383	\$ 164,383	-\$ 1,303,817

Source: *Jozsa Management & Economics*

Table 5.5 shows that with the industrial/commercial development in the park, the Client Group will see a change in net revenue of-\$5,963 in 2010, which will rise to \$183,709 in 2023 at which point no further land is left for sale unless a second expansion is undertaken. The 22 year total net change in revenue will be about \$2,746,946 (2009\$).

The net revenue change cannot be considered incremental to what would have happened if the park had not been built, i.e., there would likely still be some commercial / industrial development occur in the area, even if the park was not built. However, our research found that space for industrial/commercial development within the area is at a premium. Therefore, we expect that the majority, in the range of 75%, of the expanded park related municipal revenue would be incremental to the Client Group, leaving a net incremental revenue change of \$2,060,210.

The calculations in Table 5.5 are based on the following assumptions:

- The expanded park will result in foregone property taxes and other municipal revenue (i.e. taxes from current land uses given up in favour of commercial property in the park) of \$9,024 per year.
 - Foregone property tax assumes that the land purchased for the park would have remained at its 2009 use and assessment from 2010 to 2031.

- Property tax rates and area rates from the Town were applied to the assessment in the expanded park.
- Other revenue estimates were based on the ratio of other and own source revenue to property tax revenue in a cross-section of municipal jurisdictions.
- The tax rate used to estimate park property tax revenue is the current Town of Windsor commercial property tax rate.

Table 5.5: Benefit/Cost Analysis (2009\$) Change in Tax and Other Revenues & Net Financial

Year	Change in Tax, Licenses, Fees, Own Source Revenue									Net Change After Net Fin'l. & Net Rev. Chng.		
	Foregone Revenue					Park Related Revenue				Net Revenue Change	Annual	Cumulative
	Town		Municipality		Total Foregone Revenue	Property Tax	Other Revenue	Total Revenue				
	Property Tax	Other Revenue	Property Tax	Other Revenue								
2010	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-\$ 37,500	-\$ 37,500	
2011	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-\$ 37,500	-\$ 75,000	
2012	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-\$ 37,500	-\$ 112,500	
2013	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-\$ 37,500	-\$ 150,000	
2014	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-\$ 37,500	-\$ 187,500	
2015	\$ 6,989	\$ 1,479	\$ -	\$ -	\$ 8,467	\$ -	\$ -	\$ -	\$ 8,467	-\$ 59,241	-\$ 246,741	
2016	\$ 6,989	\$ 1,479	\$ -	\$ -	\$ 8,467	\$ -	\$ -	\$ -	\$ 8,467	-\$ 59,241	-\$ 305,982	
2017	\$ 6,989	\$ 1,479	\$ -	\$ -	\$ 8,467	\$ 10,151	\$ 2,148	\$ 12,299	\$ 3,832	-\$ 36,522	-\$ 342,504	
2018	\$ 6,989	\$ 1,479	\$ -	\$ -	\$ 8,467	\$ 20,303	\$ 4,296	\$ 24,598	\$ 16,131	-\$ 24,223	-\$ 366,727	
2019	\$ 6,989	\$ 1,479	\$ -	\$ -	\$ 8,467	\$ 30,454	\$ 6,443	\$ 36,897	\$ 28,430	-\$ 11,924	-\$ 378,651	
2020	\$ 6,989	\$ 1,479	\$ -	\$ -	\$ 8,467	\$ 40,605	\$ 8,591	\$ 49,197	\$ 40,729	\$ 375	-\$ 378,276	
2021	\$ 6,989	\$ 1,479	\$ -	\$ -	\$ 8,467	\$ 50,757	\$ 10,739	\$ 61,496	\$ 53,028	\$ 12,674	-\$ 365,602	
2022	\$ 6,989	\$ 1,479	\$ -	\$ -	\$ 8,467	\$ 62,296	\$ 13,180	\$ 75,477	\$ 67,009	\$ 28,076	-\$ 337,526	
2023	\$ 6,989	\$ 1,479	\$ -	\$ -	\$ 8,467	\$ 73,836	\$ 15,622	\$ 89,458	\$ 80,990	\$ 42,056	-\$ 295,470	
2024	\$ 6,989	\$ 1,479	\$ -	\$ -	\$ 8,467	\$ 85,375	\$ 18,063	\$ 103,439	\$ 94,971	\$ 56,037	-\$ 239,432	
2025	\$ 6,989	\$ 1,479	\$ -	\$ -	\$ 8,467	\$ 96,915	\$ 20,505	\$ 117,419	\$ 108,952	\$ 70,018	-\$ 169,414	
2026	\$ 6,989	\$ 1,479	\$ -	\$ -	\$ 8,467	\$ 108,454	\$ 22,946	\$ 131,400	\$ 122,933	\$ 83,999	-\$ 85,415	
2027	\$ 6,989	\$ 1,479	\$ -	\$ -	\$ 8,467	\$ 121,395	\$ 25,684	\$ 147,079	\$ 138,612	\$ 17,600	-\$ 67,815	
2028	\$ 6,989	\$ 1,479	\$ -	\$ -	\$ 8,467	\$ 134,336	\$ 28,422	\$ 162,758	\$ 154,291	\$ 33,279	-\$ 34,535	
2029	\$ 6,989	\$ 1,479	\$ -	\$ -	\$ 8,467	\$ 147,277	\$ 31,160	\$ 178,437	\$ 169,970	\$ 48,958	\$ 14,423	
2030	\$ 6,989	\$ 1,479	\$ -	\$ -	\$ 8,467	\$ 160,218	\$ 33,898	\$ 194,116	\$ 185,649	\$ 64,637	\$ 79,060	
2031	\$ 6,989	\$ 1,479	\$ -	\$ -	\$ 8,467	\$ 160,218	\$ 33,898	\$ 194,116	\$ 185,649	\$ 51,365	\$ 130,425	
22 Year Total	\$ 118,809	\$ 25,137	\$ -	\$ -	\$ 143,946	\$ 1,302,591	\$ 275,596	\$ 1,578,188	\$ 1,434,242	\$ 130,425		

Source: *Jozsa Management & Economics*

The final two columns of Table 5.5, “Net Change After Net Fin'l. & Net Rev. Chng.” combines the net financial position of the expanded park and the net revenue position earned by the Town due to increased assessment. The annual cash flow does not turn positive until 2013 and the cumulative.

5.4 Summary of Economic and Community Development Impacts

5.4.1 Economic Development

The new park will encourage businesses to remain and grow in West Hants and will attract new investment that might have gone to other parks outside the area. Figure 5.5 shows the projected growth of employment in the new park and the associated multiplier employment effects in West Hants.²⁹ Should the expansion of the park be stopped at about 7.0 Ha of new sales, then the employment in the expanded area of the park would level off at about the number shown for 2017-21. Should the expansion be continued to accommodate the trend growth to 2031 the employment in the expanded park would grow to about the number shown in 2027-2031.

Figure 5.1 shows the portion of the direct jobs that could be incremental to West Hants, that is, were it not for the expanded park they would not have located in West Hants. Because a portion of the direct jobs could be incremental to West Hants, the figure also shows the incremental multiplier effects for West Hants.^{30, 31}

5.4.2 Summary of Cost and Benefits

As noted above, the new industrial/commercial park expansion would bring the following anticipated benefits:

- an efficient location for industrial and commercial enterprises in West Hants;
- a business and environmentally friendly industrial commercial park, a unique selling point for the area;

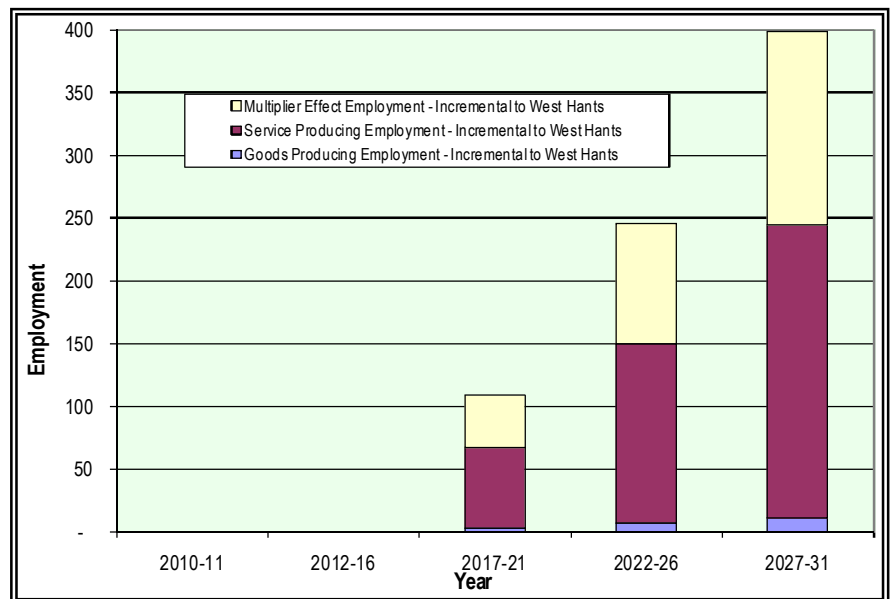


Figure 5.4.31: Incremental Direct + Multiplier Employment in the Expansion of the Windsor Industrial Park Benefit/Cost Analysis (2009\$) Land Development, Sales, Assessment

²⁹ The multiplier effects were calculated using employment based multipliers for the goods and service producing sectors, respectively, as modeled in the Nova Scotia 1996 input-output tables. The latest version, based on 2000 data, did not readily provide the multipliers in the form used in this estimate.

³⁰ The consultants assumed that 75% of the direct employment in the new park would have located outside of West Hants because:

- We assume that other parks in Hants County fill their vacant space but do not prepare more land for sale; and
- West Hants, at the time of writing, has virtually no vacant industrial park space.

³¹ The portion of multiplier effect that is incremental to West Hants was calculated based on a logarithmic relationship estimated from data provided by 22 runs of the Statistics Canada's inter-provincial input-output impact model. Two identical projects were assumed to be operated in each province and territory. About 99% of the variance in the eight smallest provinces' and territories' ability to capture spin-off effects from projects in their jurisdictions was described by a logarithmic relationship with the percent of Canadian employment in the jurisdictions as the independent variable. The equation is internally consistent because it indicates that as a jurisdiction's share of Canadian employment approaches 100% it becomes able to capture 100% of the spin-off effects. (All direct effects are by definition resident in the project's home jurisdiction.)

- support for other commercial activities in the area including the core of the Town of Windsor that also serves surrounding Municipality and communities;
- improved land use planning because the expanded park will help,
 - minimize conflicts with agricultural and residential land use throughout West Hants;
 - reduce the pressure on agricultural land by industrial and commercial uses because the expanded park is planned for higher densities than existing parks in the Annapolis Valley Region;
- new industrial/commercial development in the form of incremental jobs, about 244 direct and 154 spin-off; and
- net positive incremental municipal revenue.

5.5 Potential Challenge

The major challenge faced by the Client Group will come as the first Stage of expansion, the addition of about 7.1 Ha of saleable space, becomes occupied by about 2030. The Client Group will then need to consider the feasibility of purchasing additional land and incurring much higher development costs on that land because it is unlikely to have a complete system of existing streets and services that that be used, which was the benefit in Stage One.

5.6 Sites for Potential Future Expansion

Should the need for further expansion arise in the future, the following sites around Highway Exits 5 and 5A could be considered.

5.6.1 Highway Exit 5A

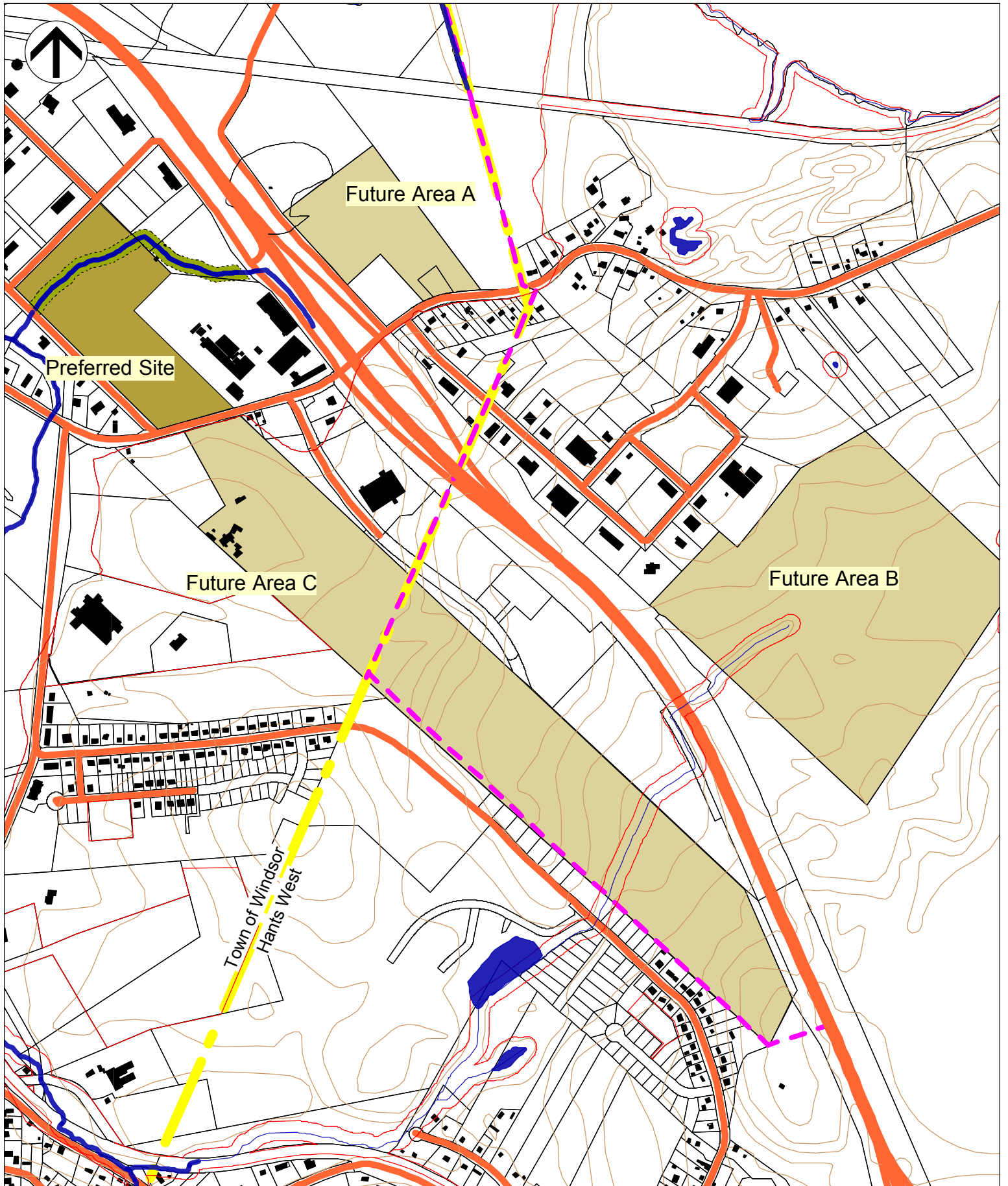
5.6.1.1 FUTURE AREA A

Future Area A is located east of Highway 101 and north of Wentworth Road and would approximately 6 gross hectares of developable land (Figure 5.6). Business park development in the area would take advantage of existing services in Wentworth Road and would continue the trend of developing a business park cluster around Highway Exit 5A. Future Area A is located in an area with rock types, the Wentworth Station Formation, that can result in sink holes (Figure 5.7). Geo-technical studies prior to the purchase of the land by the Client Group should assess the risk for sinkholes to occur.

5.6.1.2 FUTURE AREA B

Future Area B is in effect an extension of the Windsor-West Hants Industrial Park to the south of the existing park and would yield approximately 29 gross hectares of developable land (Figure 5.6). Existing services from the Windsor-West Hants Industrial Park could be extended.

The park water main is 10 inches in diameter with 6 inch and 8 inch distribution lines. The park has 100 pounds of pressure per square inch (PSI). Sewer lines in the Windsor-West Hants Industrial Park are 10” in diameter with a 30 inch sanitary trunk sewer line running to the same sewage lagoon that services Windsor Industrial Park. Storm water in the industrial park flows northwest through low profile in-ground water mains and is channelled towards a storm water retention pond located near the park



West Hants Business Park Feasibility Study

Sites for Potential Future Expansion - Highway Exit 5A

— — — — — Service Boundary

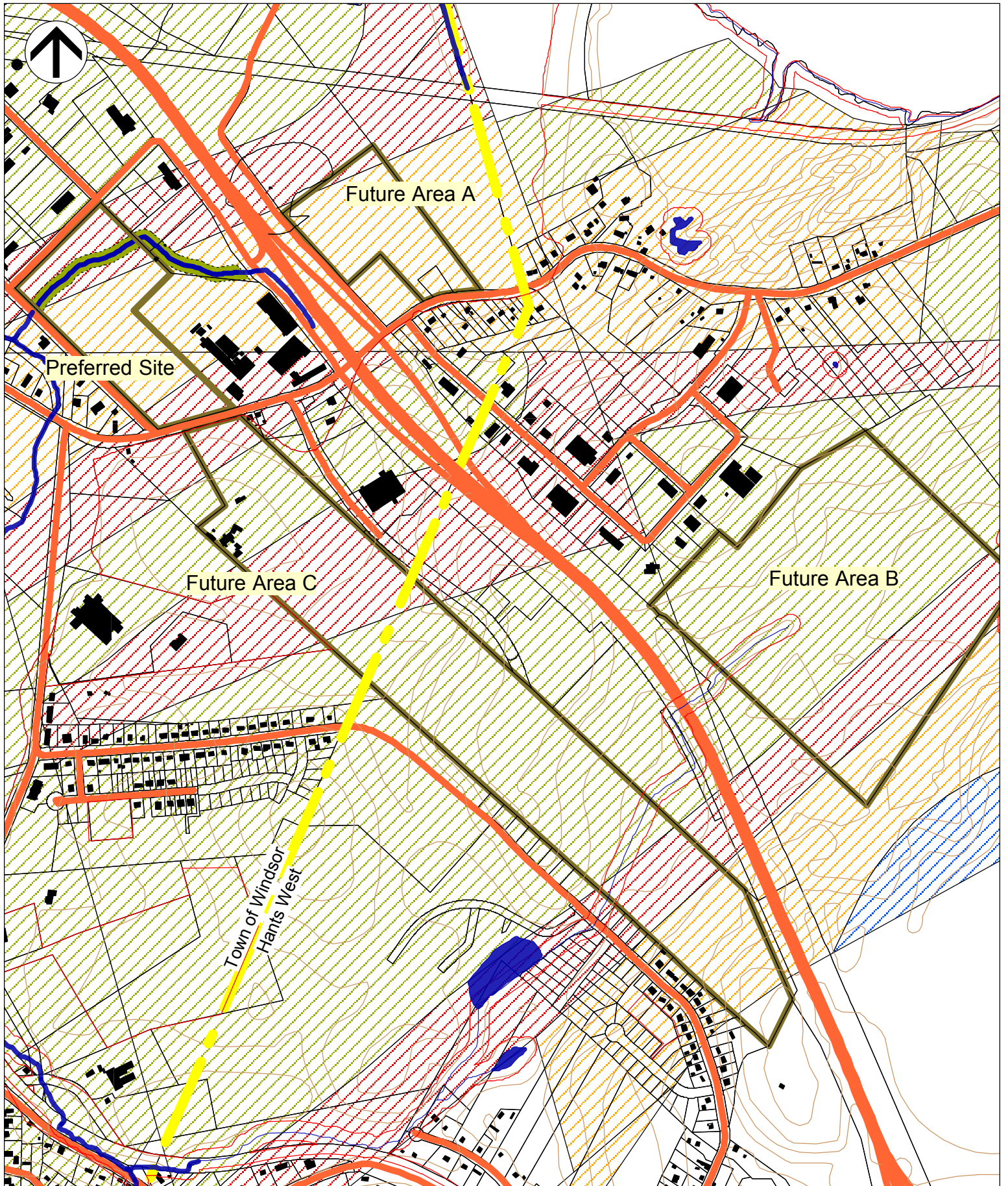
Figure 5.6

0 200 500 m

Project: 101204
Date: April 2010

Scale: 1:10000





West Hants Business Park Feasibility Study

Potential Karst Topography - Exit 5A

Project: 101204
Date: April 2010

Wentworth Station Formation
 Miller Creek Formation
 Murphy Road Formation

Pesaquid Lake Formation

0 200 500 m

Figure 5.7

Scale: 1:10000



entrance. All streets in the existing Windsor-West Hants Industrial park have continuous concrete curbs and gutters with sidewalks.

The majority of Future Area B is located in an area of rock types (Murphy Road Formation) with a lesser tendency to form karst (Figure 5.7). The southern end of the site is located in an area of rock types that more commonly result in sink holes. Geo-technical studies prior to the purchase of the land by the Client Group should assess the risk for sinkholes to occur.

5.6.1.3 FUTURE AREA C

Future Area C is located west of Highway 101 and south of Wentworth Road. It is in effect an extension of the new portion of the Windsor Industrial Park to the west and south and would yield approximately 33 gross hectares of developable land (Figure 5.6). The site would take advantage of existing services in Wentworth Road and Cole Drive.

Large portions of Future Area C are located in an area of rock types (Murphy Road Formation) with a lesser tendency to form karst (Figure 5.7). Smaller portions of the site appear more susceptible to sink hole development. Geo-technical studies prior to the purchase of the land by the Client Group should assess the risk for sinkholes to occur.

5.6.2 Highway Exit 5

5.6.2.1 FUTURE AREA D

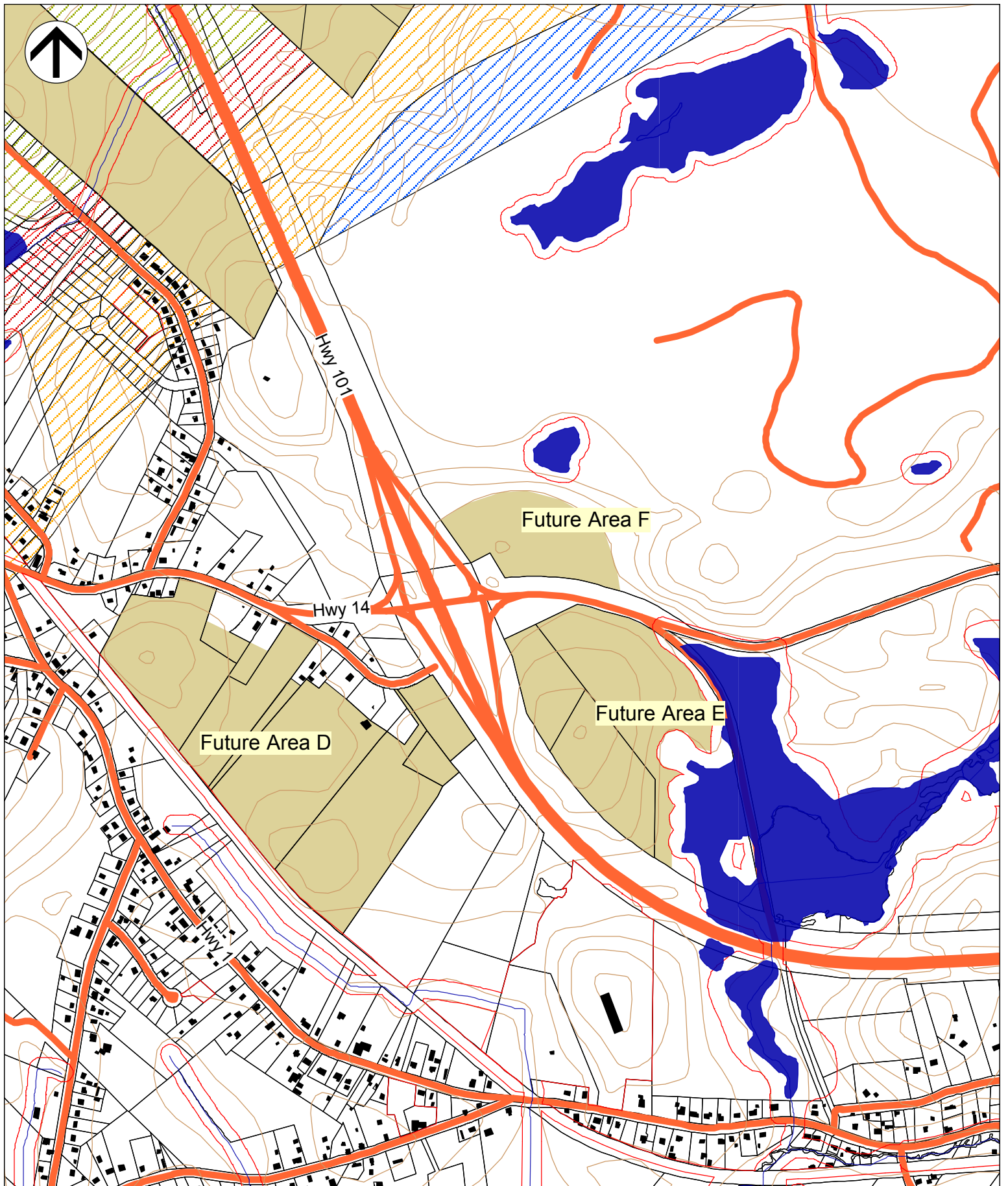
Future Area D is located west of Highway 101 and south of Highway 14 (Figure 5.8). The area could yield approximately 19 gross hectares of developable land. The Client Group should support the private developer in his efforts to develop the lands at the end of Old Brooklyn Road and in the areas indicated in Figure 5.8. Water and sewer infrastructure could be extended from the existing lines in Highway 14 and Old Brooklyn Road. No karst topography can be found in this area.

5.6.2.2 FUTURE AREA E

Future Area E is located east of Highway 101 and south of Highway 14 (Figure 5.8). The area could yield approximately 12 gross hectares of developable land. Services could be extended from Old Brooklyn Road underneath Highway 101, albeit with an added cost for the necessary channelling. No karst topography can be found in this area.

5.6.2.3 FUTURE AREA F

Future Area F is located east of Highway 101 and north of Highway 14 (Figure 5.8). The area could yield approximately 5 gross hectares of developable land. Services could be extended from Old Brooklyn Road underneath Highway 101, albeit with an added cost for the necessary channelling. No karst topography can be found in this area.



West Hants Business Park Feasibility Study

Potential Karst Topography - Exit 5

Project: 101204
Date: May 2010

- | | |
|---|---|
|  Wentworth Station Formation |  Pesaquid Lake Formation |
|  Miller Creek Formation |  Murphy Road Formation |

0 200 500 m

Figure 5.8

Scale: 1:10000



Chapter 6 **Market Positioning**

This chapter assesses the positioning and unique selling points that a new industrial/commercial park in West Hants could bring to the market. We begin with a discussion of the principal positioning issues associated with the common factors of production and then assess the impact of policy decisions on those location factors.

We conclude with an assessment of the unique selling points that will help sell a new industrial park.

6.1 Factors Affecting Business Location Decisions

*“...local strategies and not broad economic trends or conditions are a key factor in attracting new investment and improving the local standard of living. The expanding body of knowledge on quality of life indicators also confirms this conclusion. The result is a wide range of local needs-focused strategies are being pursued across Canada around “new localism” or managed change models”.*³²

The following section describes:

- how factors that influence business location decisions can be affected by local policies and actions for the betterment of the local economy; and
- how a new industrial/commercial park could be positioned as an instrument to affect change.

6.1.1 Common Factors Affecting Location Decisions

6.1.1.1 LABOUR

Businesses are, other things equal, attracted to areas whose local wages are lower than those in competing jurisdictions. However, the tendency to search for areas with low wages is being offset by the growing demand and need for highly skilled and educated labour, that is, an efficient and productive labour supply. Therefore, an educated workforce is becoming the primary location factor for growing companies. Declining firms and firms in stagnant or declining sectors, still generally, seek out low-wage areas to be able to compete.

However, in areas of that have relatively lower costs of living, the labour force can accept lower wage rates and still maintain a relatively equal level of purchasing power vis-à-vis competing areas that have higher costs of living. This factor plays to the advantage of healthy firms and firms that are growing.

West Hants, by virtue of its location at a moderate distance from the Halifax Census Metropolitan Area, is able to boast relatively lower costs of living especially as they relate to property ownership. The area shows a relatively higher level of education than other areas outside of the Halifax Census Metropolitan Area. In addition West Hants and has high quality university and Nova Scotia Community College campuses close by. These two facilities provide the existing labour force with access to training and education as well as upgrading and extension opportunities.

³² “Local Government Resource Handbook”, Service Nova Scotia and Municipal Relations, 2006, p. 20.

In addition, research has shown that regions that have top quality universities tend to be more able to retain an educated and skilled labour force than those without such an educational institution.

6.1.1.2 LAND

Land requirements differ among industry types. A new park in Hants County would be able to offer:

- firms with significant research and development needs a location that is close to a major university as well as the Agriculture Canada research station in Kentville;
- distribution and manufacturing firms ready access to a four-lane 100 series highway;
- distribution and manufacturing firms, which often require larger areas of than other types of businesses, with relatively lower land costs for expansion; and
- higher technology manufacturing firms close proximity to urban and professional services combined with a pleasing location in a type of suburban industrial/commercial park.

The advent of high-speed data connections throughout will be an important asset to potential park tenants. The rapid growth of internet based business and just in time delivery and production logistics have made businesses more dependent than ever on high-speed communications. Even the traditional storage and warehousing business is no longer simply a storage facility but a delivery and distribution service that depends on high-speed data communications.

6.1.1.3 LOCAL INFRASTRUCTURE

There is a strong positive relationship between the quality of local economic infrastructure (transportation, water and sewer, power, industrial commercial land and buildings, and so on) and economic growth. The creation of a new industrial park will help to demonstrate that the local governments are committed to increasing the quantity and quality of public infrastructure necessary for efficient and profitable business operations.

The provision of quality public infrastructure is, obviously, expensive, and therefore tax rates tend to be higher than what might be considered the minimum level. Cutbacks in local services and infrastructure with a view to lowering tax rates are often counterproductive. The reduced quality and quantity of public infrastructure makes the area less attractive for business expansion and investment. The net effect on excessive tax cuts on economic growth is often negative.

6.1.1.4 ACCESS TO MARKETS

With the advent of lower transportation costs, facilitated by improvements in truck and marine transportation technology, highway networks and logistics methods, transportation costs are becoming a less important factor in business location decisions. This remains the case even with the recent rise in fuel prices. Transportation, as a fraction of the cost of production, continues to decline.

The new industrial/commercial park can effectively position itself by demonstrating its relative close location to tidewater ports, an international airport as well as a network of 100 series highways. The proximity of transportation infrastructure combined with lower land and operating costs in West Hants could be shown to overcome higher transportation costs relative to, say, a location in the Halifax Census Metropolitan Area.

6.1.1.5 MATERIALS

The rise of the role of the service economy in developed countries reduces the influence of the location of raw materials on the location decisions of the majority of types of modern lines of business. In addition, the location of a new industrial park at the eastern end of the Annapolis Valley puts it in a good position to attract businesses interested in using the Valley's agricultural output as part of their value added manufacturing processes and then shipping to Lower Sackville and thence by road to eastern and central North America or to Halifax and thence internationally by marine transport, rail or air.

6.1.2 Policy Factors Affecting Location Decisions

Locally and regionally controlled policies can help overcome local deficiencies in the common location factors. Most importantly, unlike the common factors that affect business location decisions, policies related to tax rates, business regulation and financial incentives are largely within the control of local and regional governments.

6.1.2.1 REGULATIONS

A new industrial park in West Hants could improve its competitive position if regulations for the location and expansion of businesses in the area, and in particular, in the new industrial park, are clearly specified and are supported by a process that promotes efficient processing of permits and approvals. The research shows that investors and business owners have greater concerns for unclear regulatory processes and inefficient processes than they do for strict controls that have clear objectives and are clearly specified and implemented efficiently.

The short-term cost of appropriate and effective regulatory controls is often outweighed by the longer-term benefits associated with the protection they afford to the quality of the environment and community life, which in turn benefit businesses. Therefore, the new industrial park could further improve West Hants' competitive position if the regulatory controls governing the use and location of businesses in the park can be shown to be in the long-term best interests of businesses and investors.

6.1.2.2 TAXES

Other things being equal, taxation levels that are higher than in competing jurisdictions tend to discourage economic growth. However, other things are rarely equal. The new industrial park could improve its competitive position if it can be shown that the cost of taxes, levies and permits associated with locations in the park are worth the value they provide in terms of local infrastructure and related business support services.

This point is especially important because location decisions within small regions are much more sensitive to variations in tax rates than location decisions made between regions. In other words, business owners and investors tend to first, choose a region and then, find the most tax efficient location within that region.

6.1.2.3 FINANCIAL INDUCEMENTS

In general, financial inducements are more effective in influencing the location decision within regions than that between regions. Financial inducements will have relatively less affect on attracting a firm to

Canada or to the Maritimes than they would on the location of the firm within Canada or within the Maritimes.

This situation, unfortunately, places sub-provincial regions in direct competition with each other and the net benefits generally fall to the firm because the firm has already decided to locate in the broader region and is able to "play-off" sub-regions (e.g., the Maritimes vs. the Prairies, or New Brunswick vs. Nova Scotia, or Hants County vs. Kings County).

To avoid engaging in costly "beggar thy neighbour" financial inducement activities, the municipal units within the County should consolidate the management of the existing industrial/commercial parks under local government control. While this management arrangement would not eliminate destructive competition between counties it could, at least, eliminate destructive competition between parks within Hants County.

Research has shown that, at the margin, the tax benefits from employment resulting from financial inducements are often less than the cost of the financial inducements. In addition, it is more often declining companies or companies in declining industries that are most attracted by financial inducements. Strong firms, and companies in growing sectors, are less attracted by the short-term benefits of financial inducements and more attracted by the long-term potential for successful operation at their chosen location.

6.1.2.4 AGGLOMERATION ECONOMIES

It has become a truism that businesses prefer to locate close to other businesses. This is true, obviously, for businesses that benefit from ready access to supporting business services and suppliers but is also true for businesses that are in direct competition. Businesses agglomerate for three main reasons:

- first, to benefit from a large pool of labour supply;
- second, to have ready access to inputs that may be unique to their operations; and
- third, to take advantage of formal and informal information networks.

Industry agglomerations are not defined in a clear-cut way as individual industries are defined. Industry agglomerations usually have cross-memberships, that is, industries are members of multiple agglomeration groups. For example, the wine industry agglomeration cannot be described only as wineries and vineyards integrated with and owned by wineries. The full industry agglomeration includes material and equipment suppliers, distributors and elements of the tourism sector. Similarly, equipment suppliers, distributors and elements of the tourism sector may be members of agglomerations that do not include wineries. The new park needs to be able to demonstrate to potential buyers that they:

- will have access to a large and educated/trained labour pool;
- have the transportation and communication networks they need to efficiently access inputs;
- will be part of an agglomeration that suits their line of business;
- can take advantage of existing business information networks; and
- can access services to facilitate the creation of new networks.

6.1.2.5 QUALITY OF LIFE

The fact is that the vast majority of Canada offers locations with high quality of life. Natural advantages combined with effective public sector policies with respect to education, public safety, health care, social and community amenities and environmental protection will serve as an attraction to business and labour. Other things equal, the combination of healthy economic growth and the aging of the Baby Boomers indicates that Canada is likely headed for a long period of constrained labour supply. However, the combination of the:

- fact that Baby Boomers are nearing traditional retirement age;
- severe impact of the current recession on retirement savings; and
- tendency for “seniors” to live longer and remain more active;

suggests that the constraints on labour supply may be less severe, at least over the next 10 years, than would otherwise have been the case. Baby Boomers may stay in the labour force longer out of either choice or necessity.

Therefore, the new park should position itself as an attractive location for businesses and labour by marketing to the types of business and labour that most value the unique selling points of West Hants. For example, the combination of:

- access to good jobs in Hants County;
- access to alternative job sources in the Halifax CMA; and
- life in a well serviced but still “rural” area

would be especially attractive to labour force members who have young families. These people are normally well established in the work force and are in their most productive working years. In addition, because they are relatively young they are better able to accommodate the risks associated with relocation.

In addition, older members of the labour force age group who need to work or wish to work for longer periods could find the rural nature of West Hants with ready access to health care in the County and ‘big-city’ services in Halifax attractive as a place to extend their working life or even to re-locate to begin a ‘second career’.

6.1.2.6 INNOVATION AND ENTREPRENEURSHIP

In general, people and businesses are attracted to areas that demonstrate a culture they value and that facilitate creativity. They are attracted to areas that show the ability and willingness to welcome change and adapt to change.

The new park needs to be able to demonstrate that it exists in a social and business environment that welcomes new ideas, different ways of doing things and at the same time offers a dependable environment in which families, and businesses can prosper and develop. The park can begin this positioning by demonstrating links to Acadia University, the NSCC campuses and the agricultural research station in Kentville. The new park needs to show that the area’s community and economic planning policies work hard to combine the best of the ability to seek and welcome change and the value associated with a dependable and open social and economic environment.

6.1.3 Local Positioning Factors

Virtually all of the positioning factors already discussed can largely be developed in most locations. The establishment of strong positions on these more widely held factors ensure that local areas stay on the radar for further consideration, but they are not sufficient to rise above the competition to attract business expansions and new investment. The objective of being strong with respect to the common and public policy positioning factors is to ensure that the local area stays on the list of potential investment sites long enough for it to market its unique selling points.

There are at least three unique selling points that could be claimed by a new park in Hants County.

6.1.3.1 AVAILABILITY

As was described in earlier sections, although they are other parks in the AVR, much of the available space is effectively unavailable to the majority of the service and manufacturing activities that would be most attracted to a commercial/industrial park or much more distant from the Halifax CMA and international airport than West Hants. These activities include food and beverage manufacturing, equipment and machinery repair facilities, climate controlled storage facilities, materials removal facilities and so on.

The new park should position itself as being specifically designed to accommodate multiple uses in a safe and economically efficient manner. It must be able to demonstrate that businesses wishing to locate in the park will not face restrictions that eliminate the park as their location of choice.

6.1.3.2 LOCATION

The new park would be able to position itself as being uniquely able to serve the needs of the AVR because it is at the continent-side exit of the Annapolis Valley and on the main transport route to the Halifax CMA. A location at the eastern exit of the Valley provides a mustering point for businesses moving raw materials, intermediate products and finished products out of and into the Valley.

The new park would be able to maintain easy access to the Halifax CMA and to provide easy access to all areas in the central and western areas of the Annapolis Valley region.

6.1.3.3 PLANNING AND DESIGN FOR THE FUTURE

The park should be planned, designed and managed to be able to accommodate emerging elements of the economy. For example, the park should be planned, designed and managed in such a way that it allows firms located in the park to use alternative energy sources such as energy from biomass, solar and wind of sources. It should be ready to accommodate alternative methods of resource use such as the use of "grey water", district heating and supply of electric power, and so on. It needs to be able to provide the size and shapes of spaces and road turning radii required by manufacturers of equipment that will be needed in the coming renewable energy economy. It needs to be designed for multiple uses because no one industry sector will likely grow large enough Valley in the next 20 years to dominate a park. The park needs to be able to accommodate food manufacturers as easily as machine and welding shops and large metal fabricators.

6.1.3.4 FORMAL MARKETING AND SELLING FUNCTION

As we noted above in Appendix B, at the time of writing there was not clearly established locus of responsibility for marketing and selling industrial park land at the park in the AVR. In addition, it is not reasonable to expect that central agencies, NSBI or the local regional development agency, will aggressively market and sell any one park in the AVR. They cannot do so because each has multiple parks and multiple municipal units within its jurisdictional boundaries. If they were to promote one park over another claims of bias would immediately arise.

Therefore, a formal marketing and selling function must be established. It should be funded by, and work solely on behalf of, the Windsor-West Hants Industrial Park and the Windsor Industrial Park. It is necessary because:

- there is no locus of responsibility now among the AVR's parks; and
- this study's e projections for the sale of the remaining land in the Windsor-West Hants Industrial Park and the land in the expanded Windsor Industrial Park will not be met without proper marketing and selling activities.

The lack of marketing and selling for AVR parks brings with it the opportunity for the Town of Windsor and the Municipality of the District of West Hants to gain a competitive edge over competing municipalities in the AVR.

6.1.3.5 PRICING FLEXIBILITY THAT STEMS FROM THE TOWN OF WINDSOR'S COMMERCIAL TAX RATE

Other things equal businesses prefer lower commercial property tax rates. However, when a business decision requires the purchase of land the situation can change.

Serviced industrial and commercial land is expensive, as this report demonstrates. However, the commercial property tax rate of the Town of Windsor enables it to offer a lower selling price for serviced industrial and commercial land if it is willing to recoup its investment over time via commercial property taxes. The same is not the case in Municipality of the District of West Hants. While its substantially lower commercial property tax rate is attractive to existing businesses it is not high enough to allow it to sell serviced land at a lower price and then recoup its investment over time via property taxes.

In this study we calculate that the Town of Windsor could sell serviced park land for \$23,579 per ha, roughly the cost of raw land and still show net benefits of about \$130,425 at the end of the study period. The Municipality of the District of West Hants would have to raise the price to about \$144,900 per ha to reach the same net benefits by the end of the study period. Given the choice of paying \$23,579 and then higher taxes in the 20 years versus \$144,900 upfront and then lower taxes in the next 20 years every accountant would recommend the former. The business will pay the same total amount, but deferring expenses is almost always preferable to payment up front in lump sums because the financial exposure of the business is reduced. However, the financial exposure of the Town is increased because it must rely on the business staying in operation in the long-run in order to recoup the impact of lower land prices.

In earlier sections we assessed the impact on net benefits of selling land in the expanded park ranging:

- from a high of \$291,240 per ha (\$117,863 per acre), which would recover all costs associated with developing and marketing the expansion; and

- to a low of \$23,579 per ha (\$9,542 per acre), which would recover the cost of the raw land needed for the expansion.

In both situations the Client Group would likely earn positive net municipal tax and revenue benefits from the expansion. At the high land price net benefits after 22 years would be about \$1,996,465 (2010\$) and at the low land price net benefits would be about \$130,425 (2010\$).

However, the true asking price for land at the expanded park will be driven by:

- local competitive conditions; and
- the willingness of the Client Group to accept the risk associated with lower up-front land prices combined with a tax rate that will allow the Client Group to recover all costs and show net benefits over a 22 year period.

Therefore, as a starting point we suggest using the NSBI's \$50,000 per ha (about \$20,000 per acre) asking price for land at the Windsor-West Hants Industrial Park. This price would result in the park expansion paying approximately \$314,624 (2010\$) in net municipal tax and revenue benefits over 22 years.

7.1 **Conclusions**

Our research leads to the following conclusions:

- There is some demand for industrial and commercial land in West Hants, although due to the inability of prospective purchasers to gain any information on available industrial land, it is difficult to determine the actual level of demand;
- In the absence of public sector subsidies the cost of prepared industrial/commercial land will be high. Therefore, the ability to allow commercial / industrial development in appropriate areas that already have services would be attractive;
- The completion of the four-lane separated highway to the area will make it more attractive to prospective tenants and it would be advisable to have land available for purchase.
- A portion of the Fairground lands in Windsor (see Section 5.1 and Figure 5.1) is the preferred development site, because:
 - it is understood that the current landowner is willing to sell off a portion of their land;
 - the low development cost due to existing services in the area; and
 - the benefit of a logical expansion of the existing Windsor Industrial Park.

If this site can be purchased, it should provide land for the next few years, which will allow the Client Group to seek out other developable lands and bring them on stream. Potential additional sites are described in Section 5.3 and on Figures 5.5 and 5.7. Potential expansion sites around Exit 5A are preferred due to the attractiveness of having new business park development associated with the existing business park development in the area. Supporting the growth of the existing private commercial / light industrial development at Exit 5 is also recommended.

- The opportunities uncovered in this study depend on a cooperative approach among the two Towns and the Municipality. None of the three has all the resources or capacity to undertake an appropriately aggressive development, marketing and selling plan.
 - The Town of Windsor has essentially no land beyond the 7.6 ha that would work well for an expansion of the Windsor and Windsor-West Hants park complex. In addition, the total cost of the development within its boundary, including the cost of marketing and selling, may unnecessarily expose it to more financial risk than is appropriate for its 'fiscal' size.
 - The Municipality has 3.9 vacant ha ready for sale in the Windsor-West Hants Industrial Park but needs the support of a well funded and well run marketing and selling function to sell its remaining land and gain a competitive advantage over other municipal units in the AVR who do not now have marketing or selling functions for parks in their boundaries. The Municipality does not have ready access to well-located park expansion land within its boundaries.
 - The Town of Hantsport has no land left to develop for industrial and commercial investment. It does have a strong commercial tax base that should enable it to contribute investment and operating funds to the expanded park(s), in return for a share of the benefits. Its contribution would reduce the risk exposure of Windsor and West Hants.
 - By cooperating, the two Towns and the Municipality could more easily absorb the risk of offering lower up front land prices in return for higher potential tax revenue in the future.

- By cooperating, the two Towns and the Municipality can mount an aggressive land acquisition, site development and marketing/selling program that singly, they cannot.

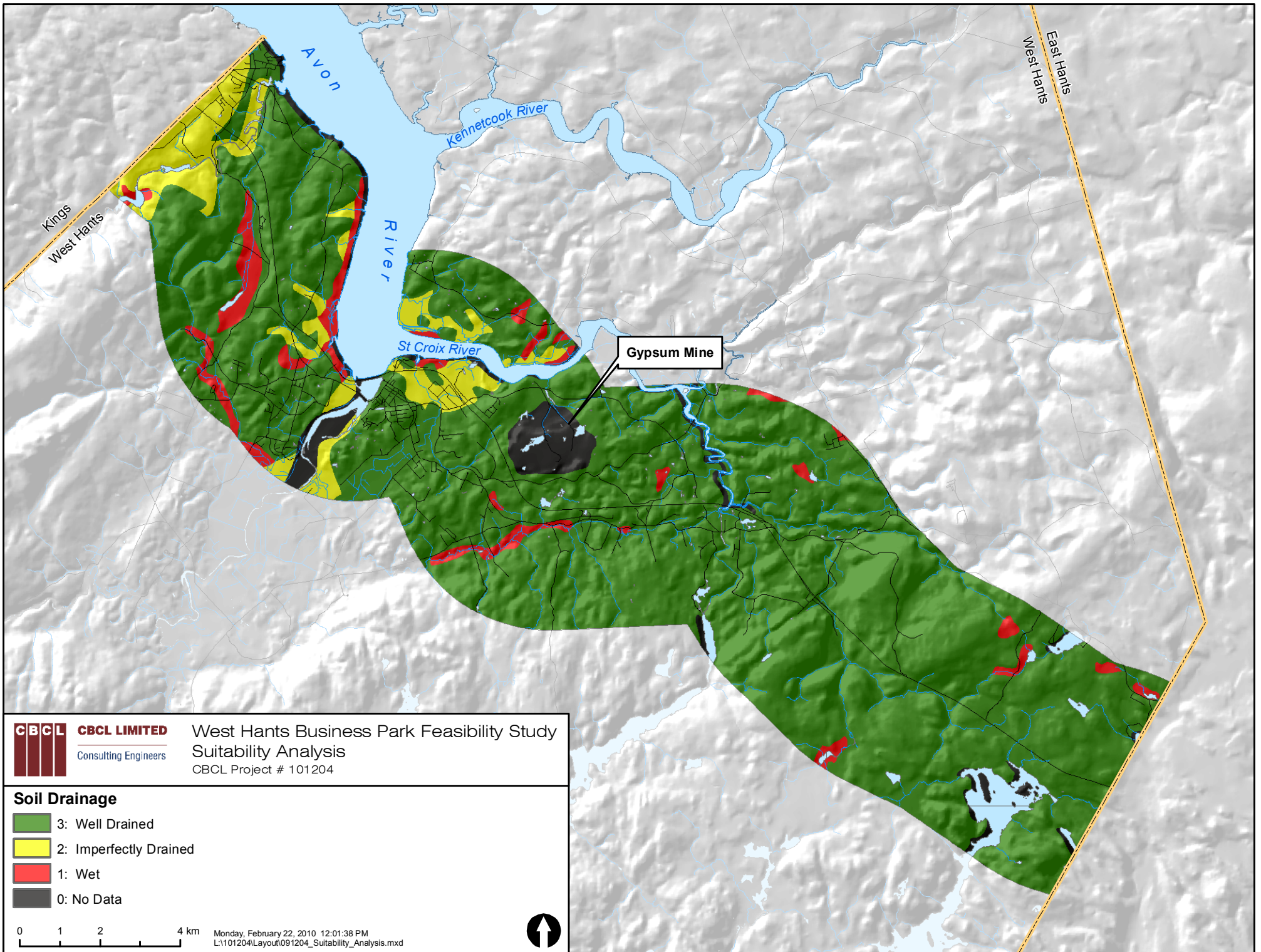
7.2 Recommendations and Next Steps Forward

It is recommended that:

- The Client Group enter into negotiations with the Windsor Agricultural Centre to purchase lands that front on Centennial Drive and Tregothic Drive;
- The Client Group undertake the environmental study required under Policy 12.0.2 of the Town of Windsor Municipal Planning Strategy to describe the susceptibility of flooding, drainage problems, and the bearing capacity and suitability for construction of soils at the site, and will identify suitable construction methods, including flood proofing measures, to overcome the constraints which are found to exist at the site;
- Based on the results of the study and if a suitable price can be negotiated, the Client Group should acquire the lands from the Windsor Agricultural Centre;
- The zoning of the area should be changed from FG: Fairground to LI-1: Light Industrial to match existing zoning in the area;
- The Client Group must establish a formal marketing and selling function that targets the Windsor Industrial Park and the Windsor-West Hants Industrial Park. The function should be controlled by the Town of Windsor and the Municipality of the District of West Hants;
 - This study provides a notional budget of \$37,500 per year (2009\$) for this function. It should be established immediately to take advantage of the vacuum of marketing and selling functions among AVR parks and thus raise the sales rate of the Windsor and Windsor-West Hants parks;
- The Town of Windsor, Town of Hantsport and Municipality of West Hants need to enter into negotiations to share the costs and benefits that stem from the park(s) expansion(s);
- In the meantime, the Client Group should continue negotiations to acquire or encourage the industrial development of potential expansion sites around Exits 5A and 5; and
- The Client Group should continue to support the private development efforts occurring at Exit 5.

Appendix A

Suitability Analysis Component Maps



West Hants Business Park Feasibility Study
 Suitability Analysis
 CBCL Project # 101204

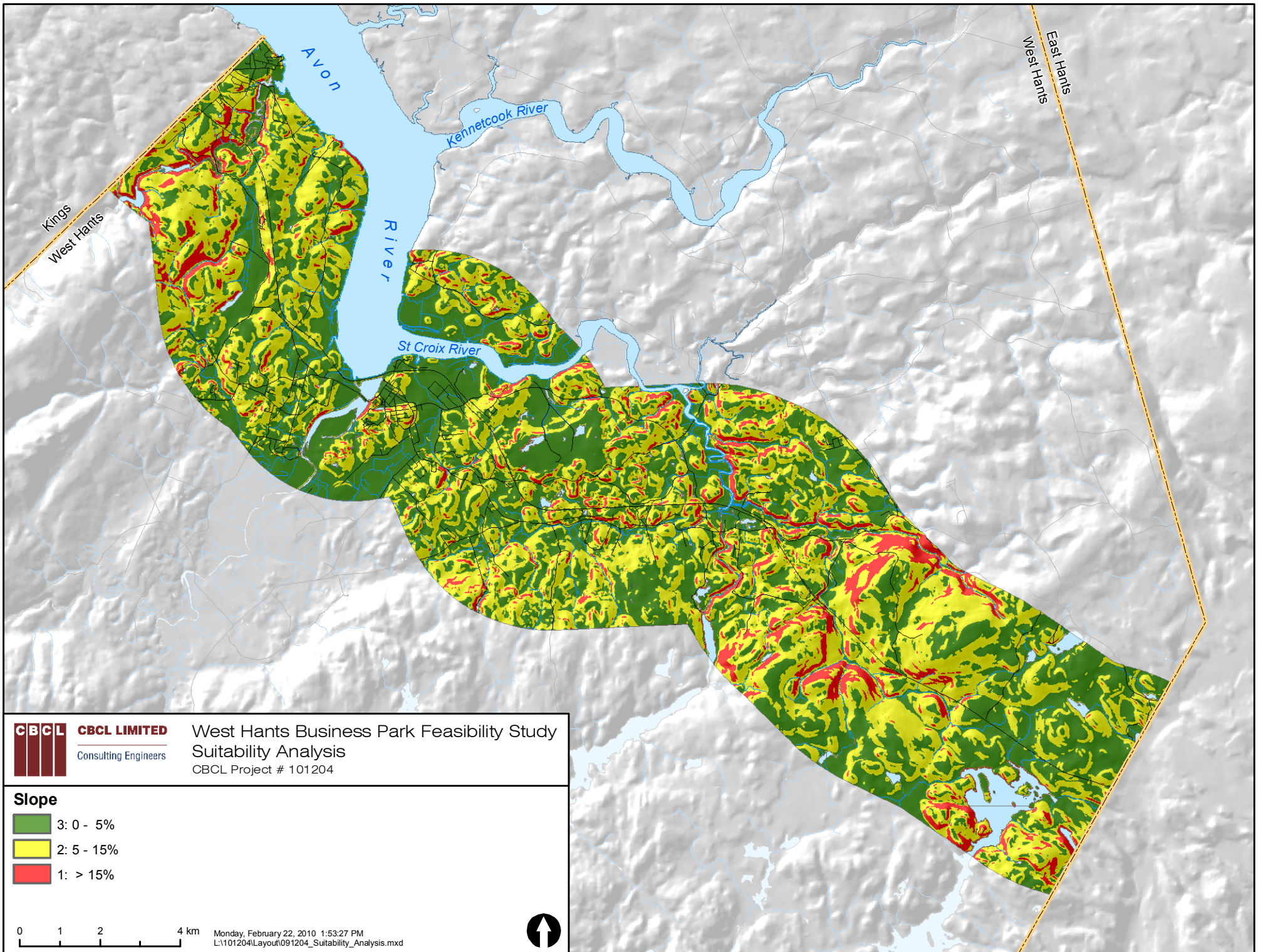
Soil Drainage

- 3: Well Drained
- 2: Imperfectly Drained
- 1: Wet
- 0: No Data

0 1 2 4 km

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West Hants Business Park Feasibility Study
Suitability Analysis
CBCL Project # 101204

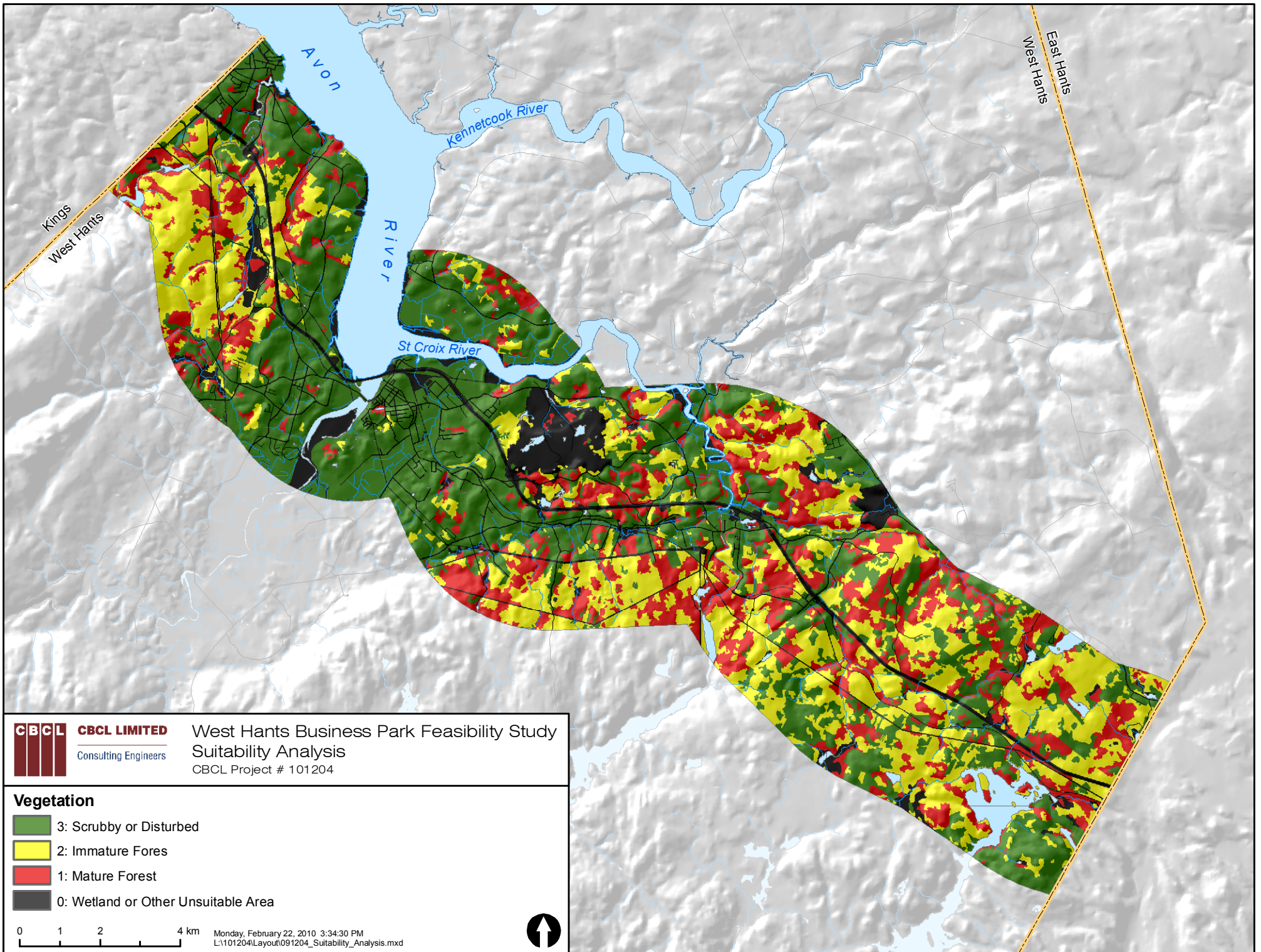
Slope

- 3: 0 - 5%
- 2: 5 - 15%
- 1: > 15%

0 1 2 4 km





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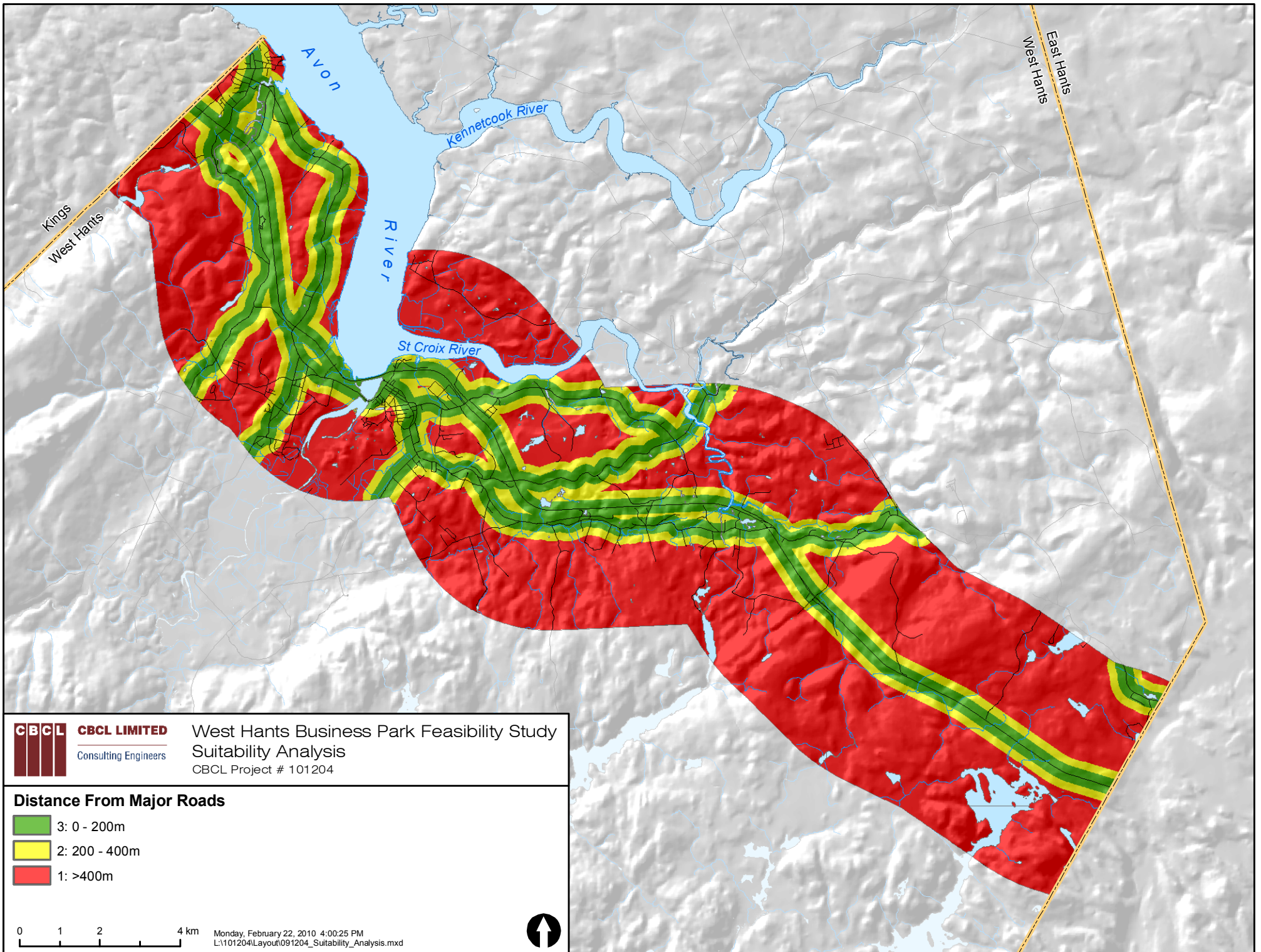
Vegetation

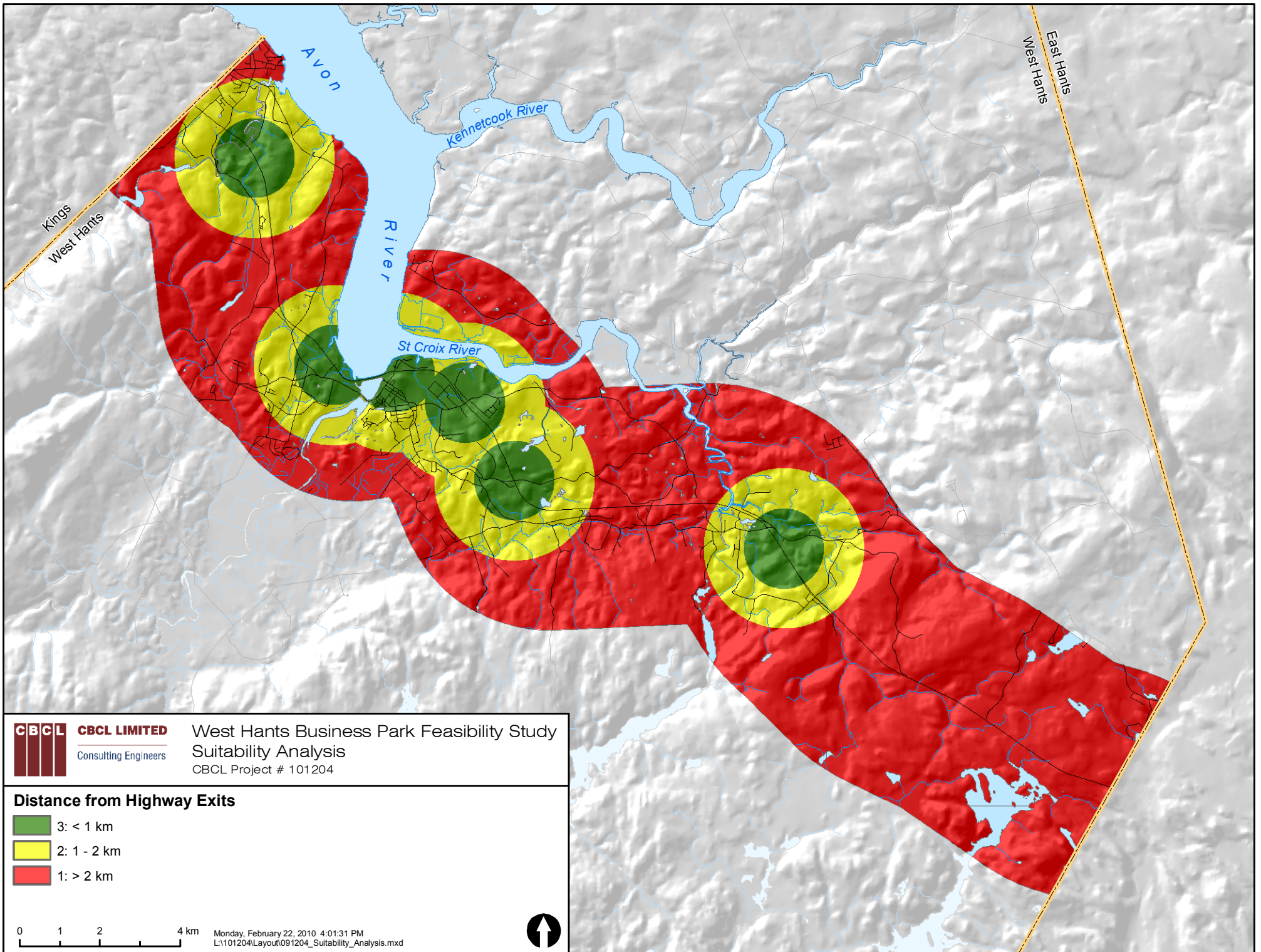
-  3: Scrubby or Disturbed
-  2: Immature Forests
-  1: Mature Forest
-  0: Wetland or Other Unsuitable Area

0 1 2 4 km

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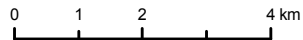




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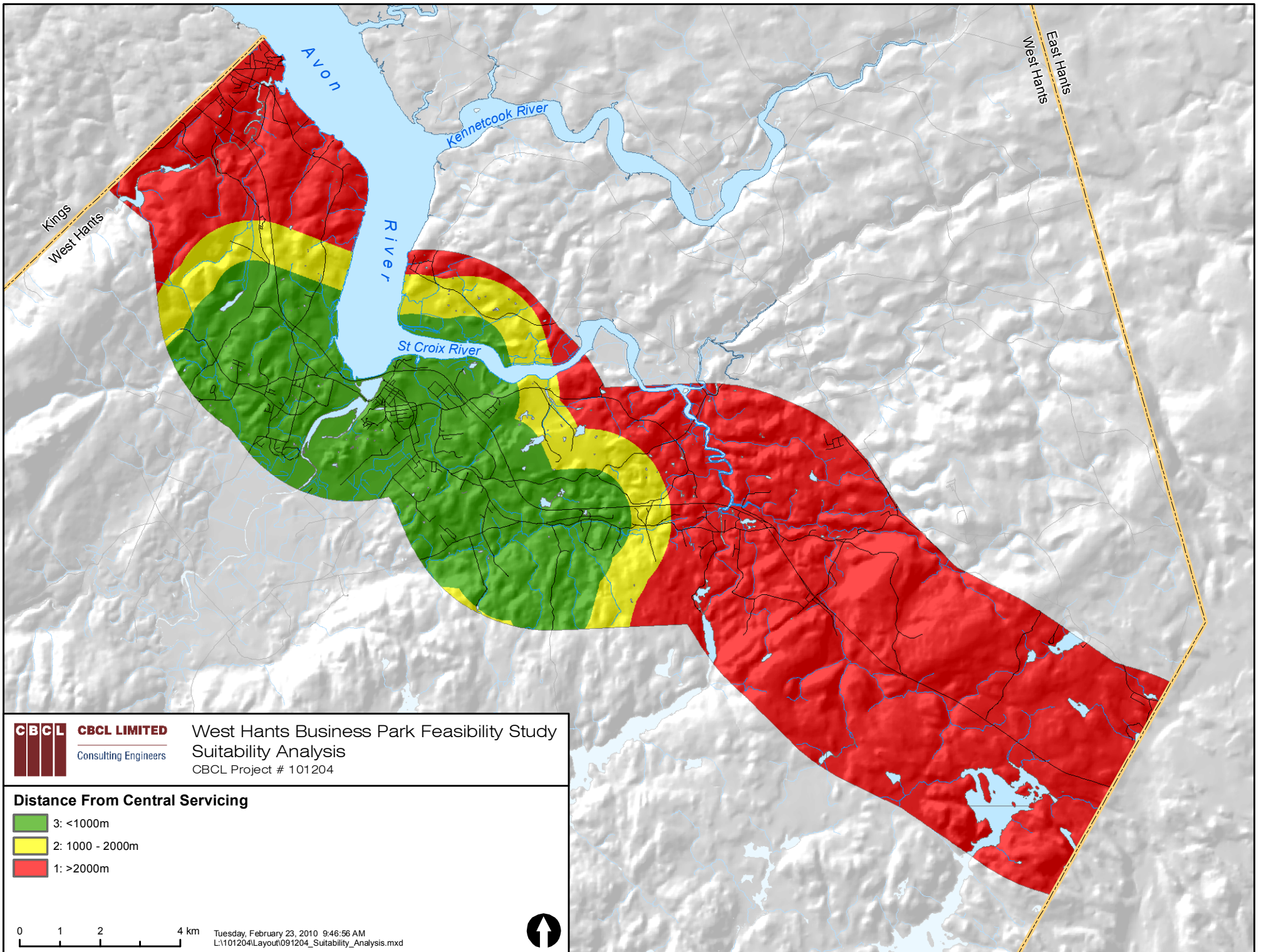
Distance from Highway Exits

-  3: < 1 km
-  2: 1 - 2 km
-  1: > 2 km



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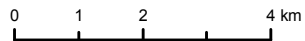




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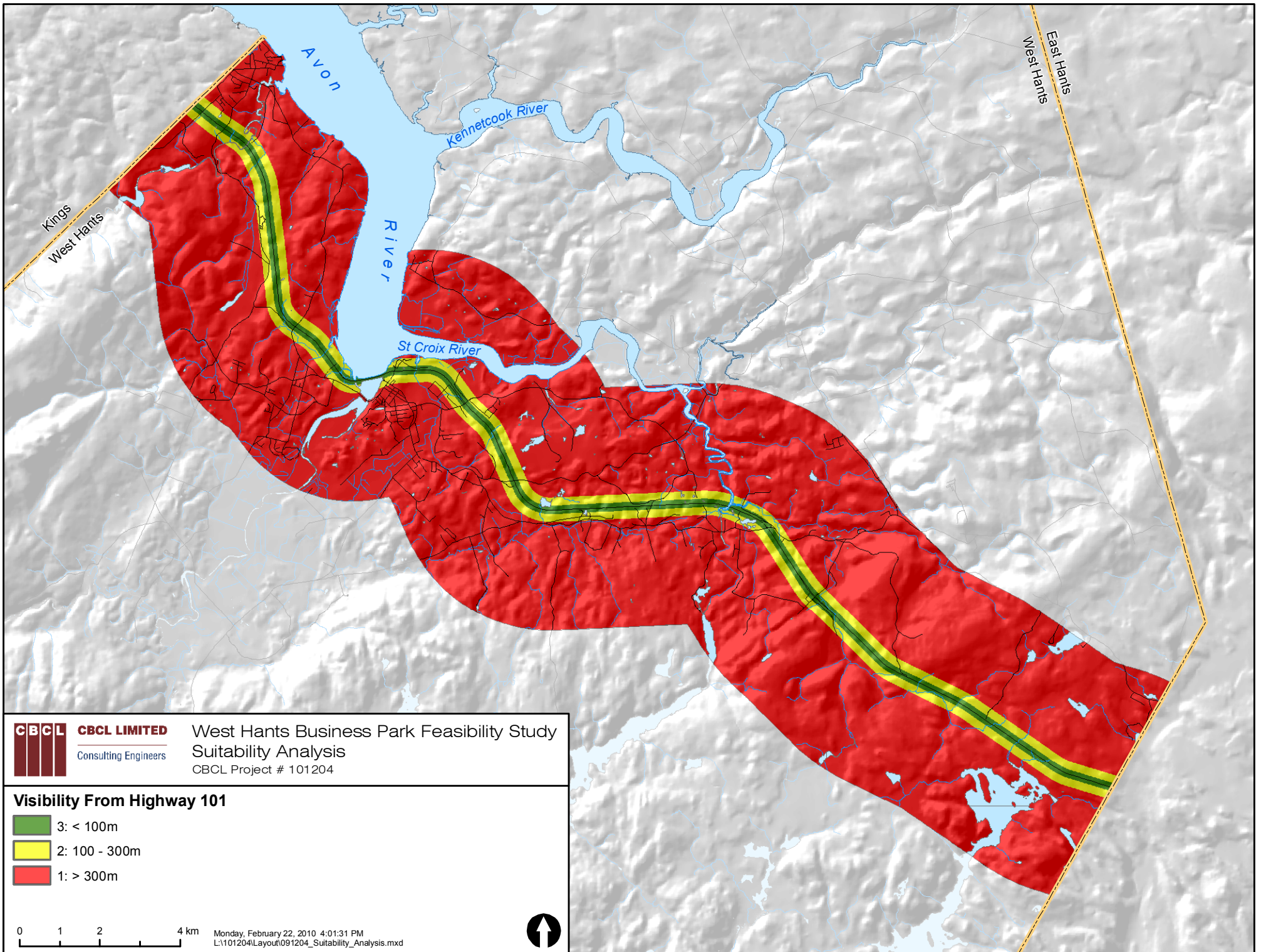
Distance From Central Servicing

- 3: <1000m
- 2: 1000 - 2000m
- 1: >2000m



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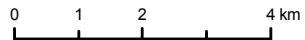




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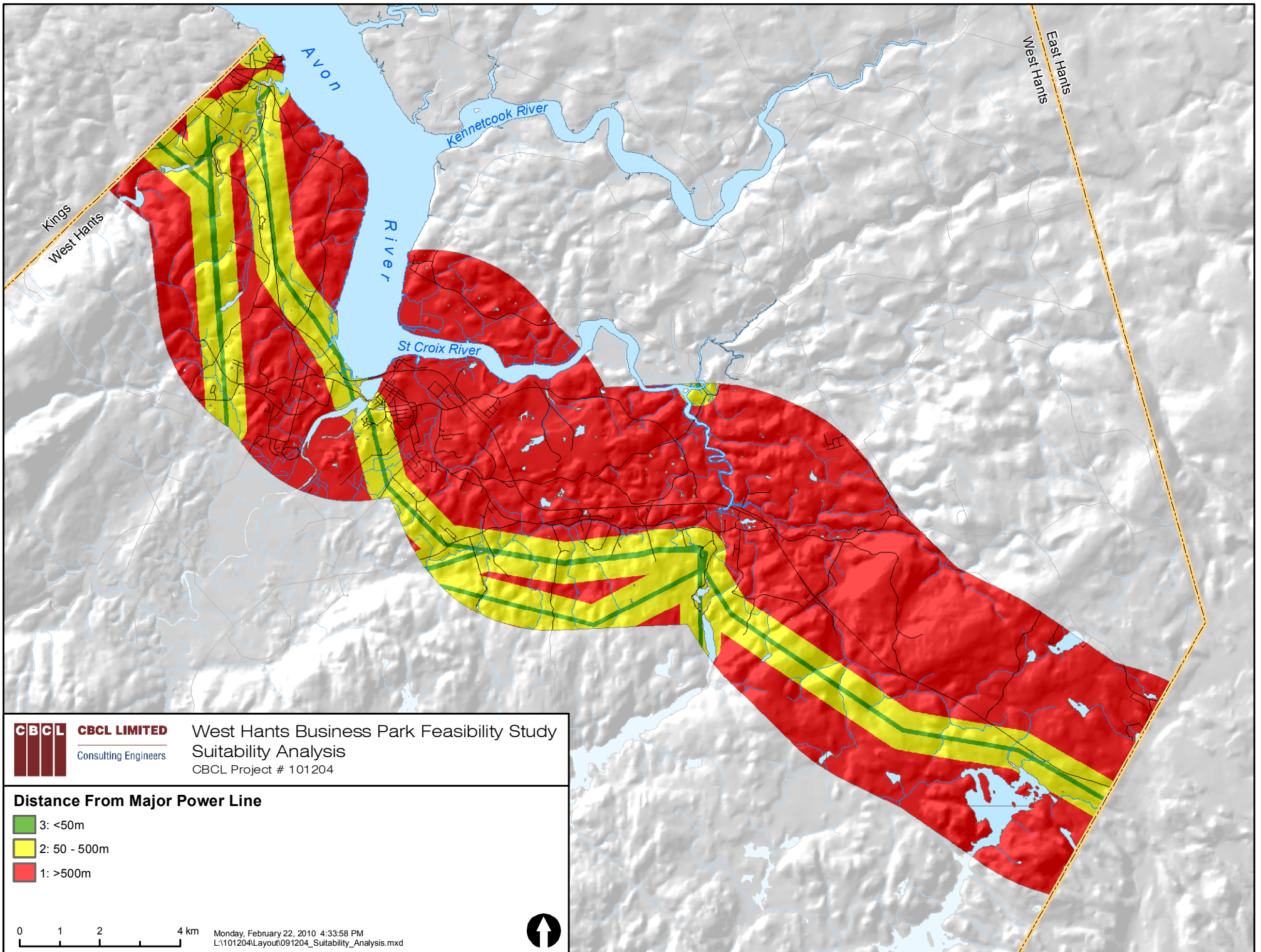
Visibility From Highway 101

- 3: < 100m
- 2: 100 - 300m
- 1: > 300m



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West Hants Business Park Feasibility Study
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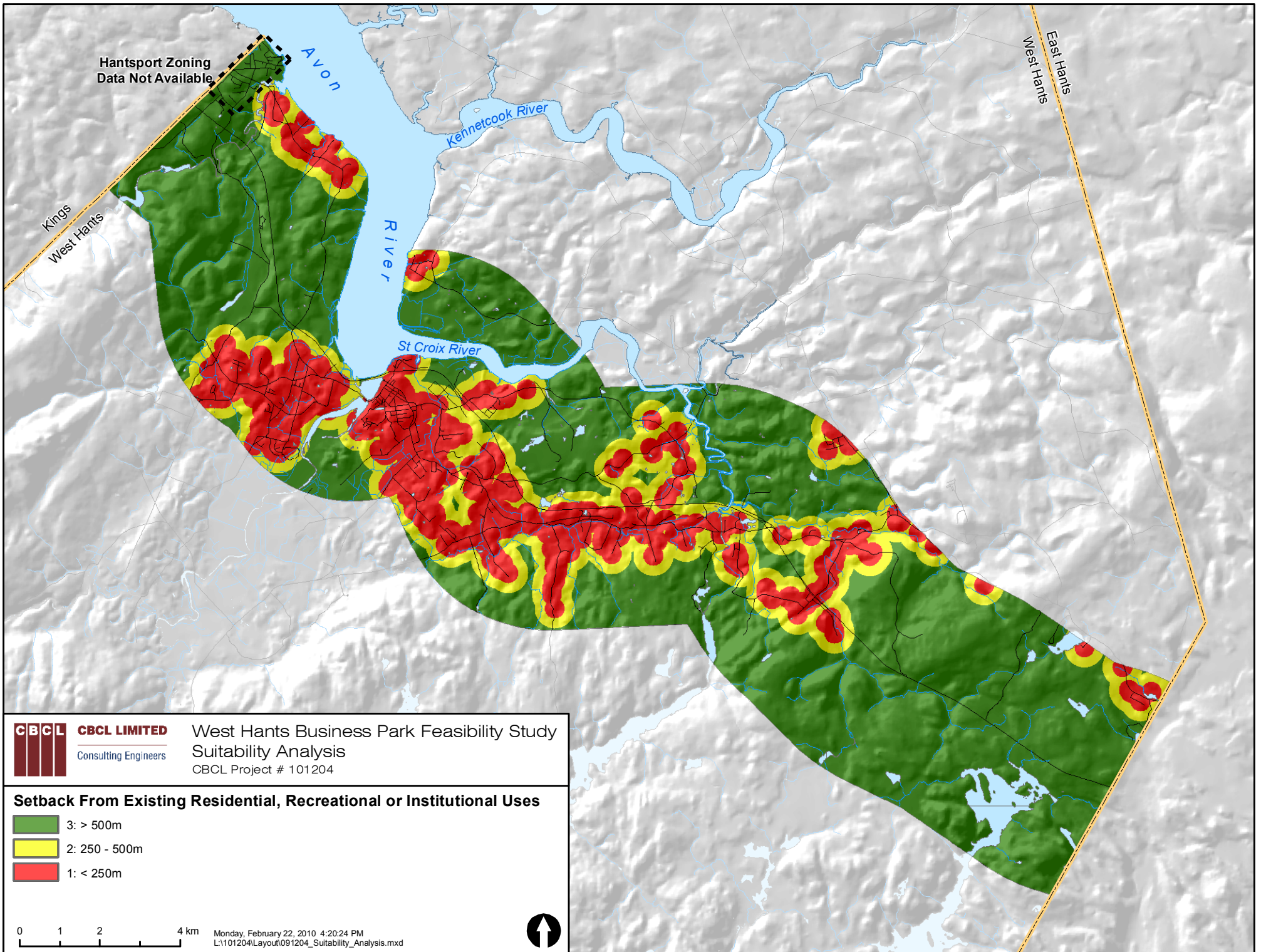
Distance From Major Power Line

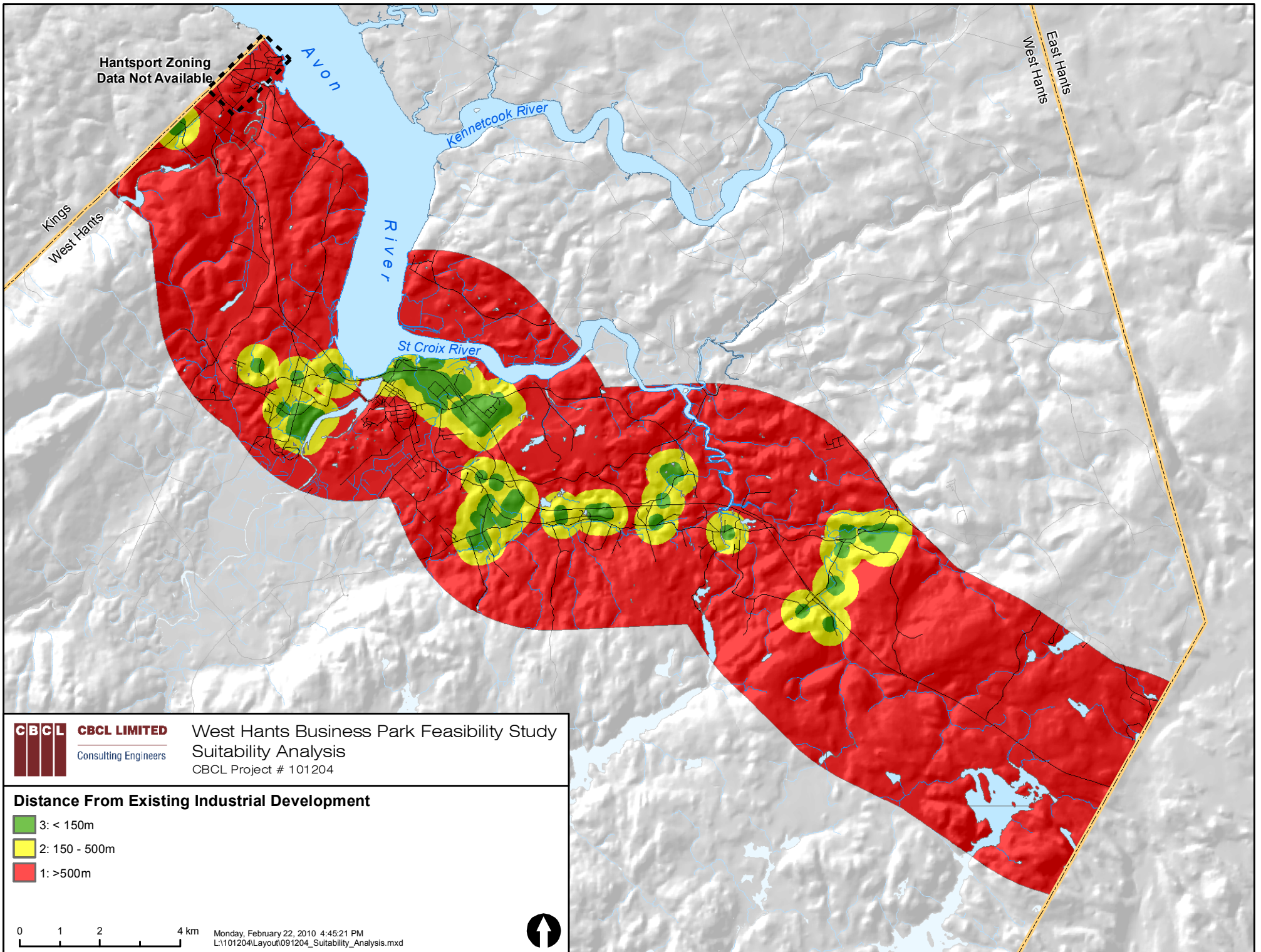
- 3: <50m
- 2: 50 - 500m
- 1: >500m

0 1 2 4 km

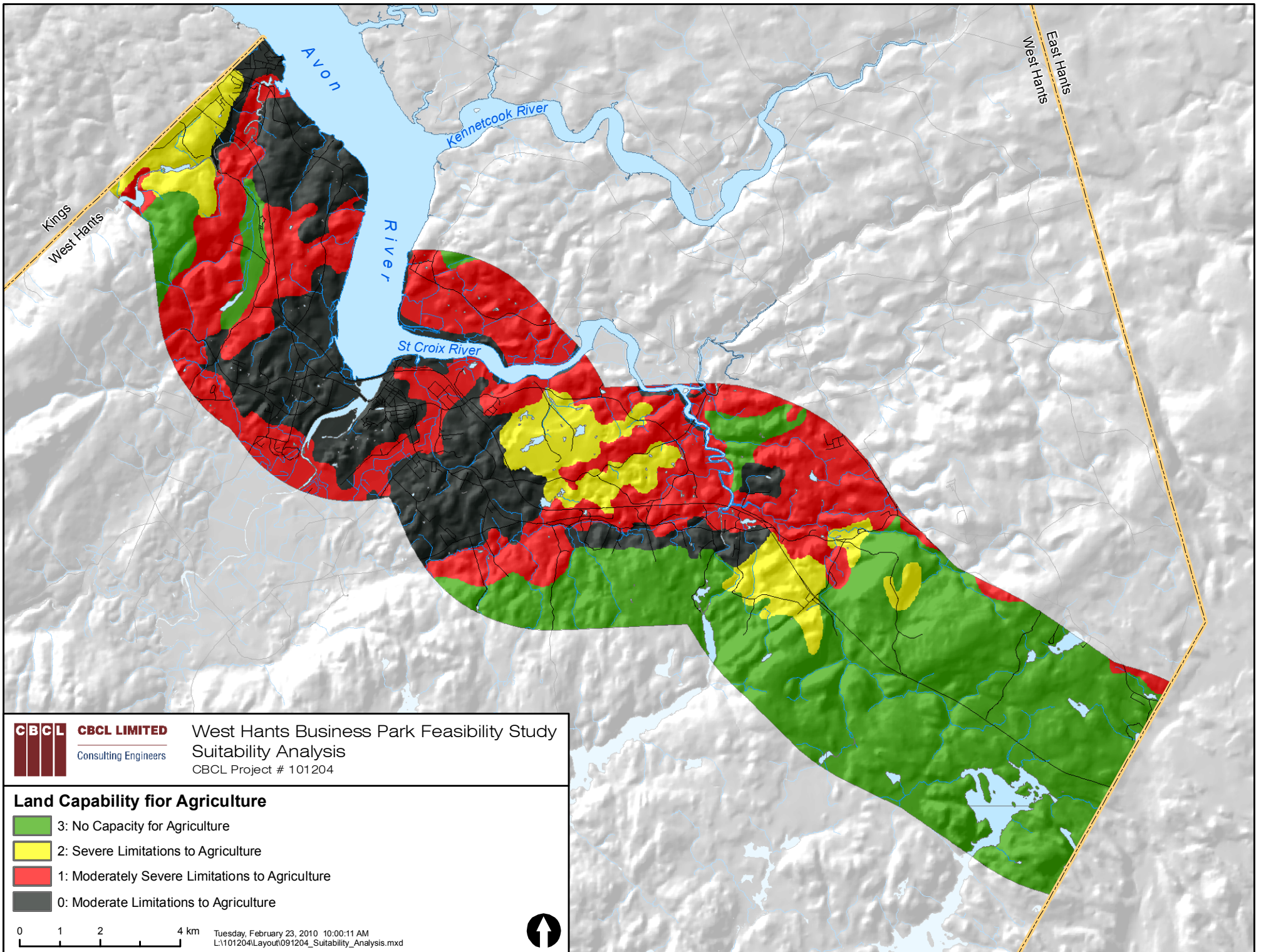
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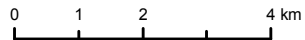


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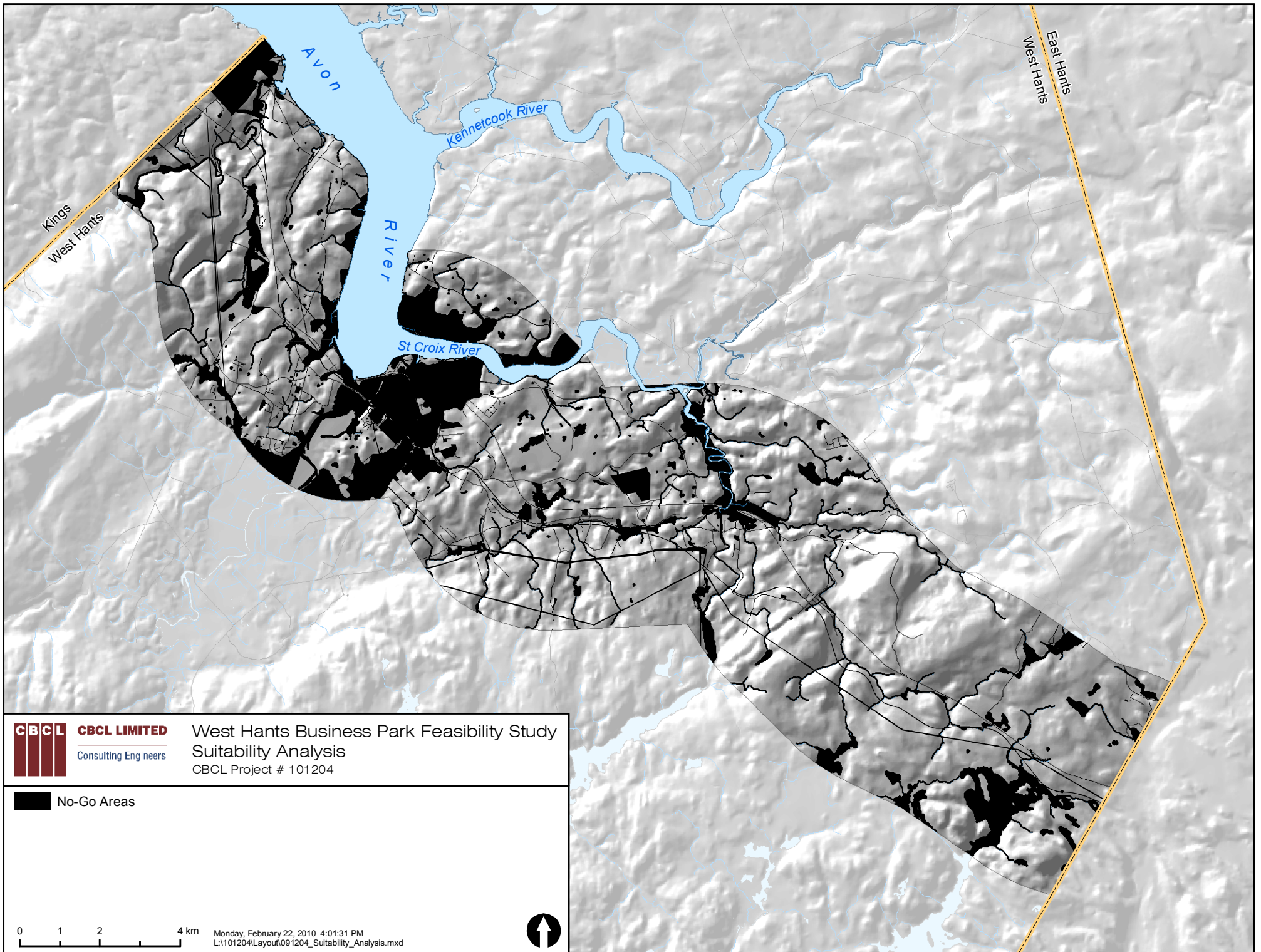
Land Capability for Agriculture

- 3: No Capacity for Agriculture
- 2: Severe Limitations to Agriculture
- 1: Moderately Severe Limitations to Agriculture
- 0: Moderate Limitations to Agriculture




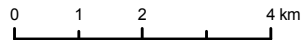
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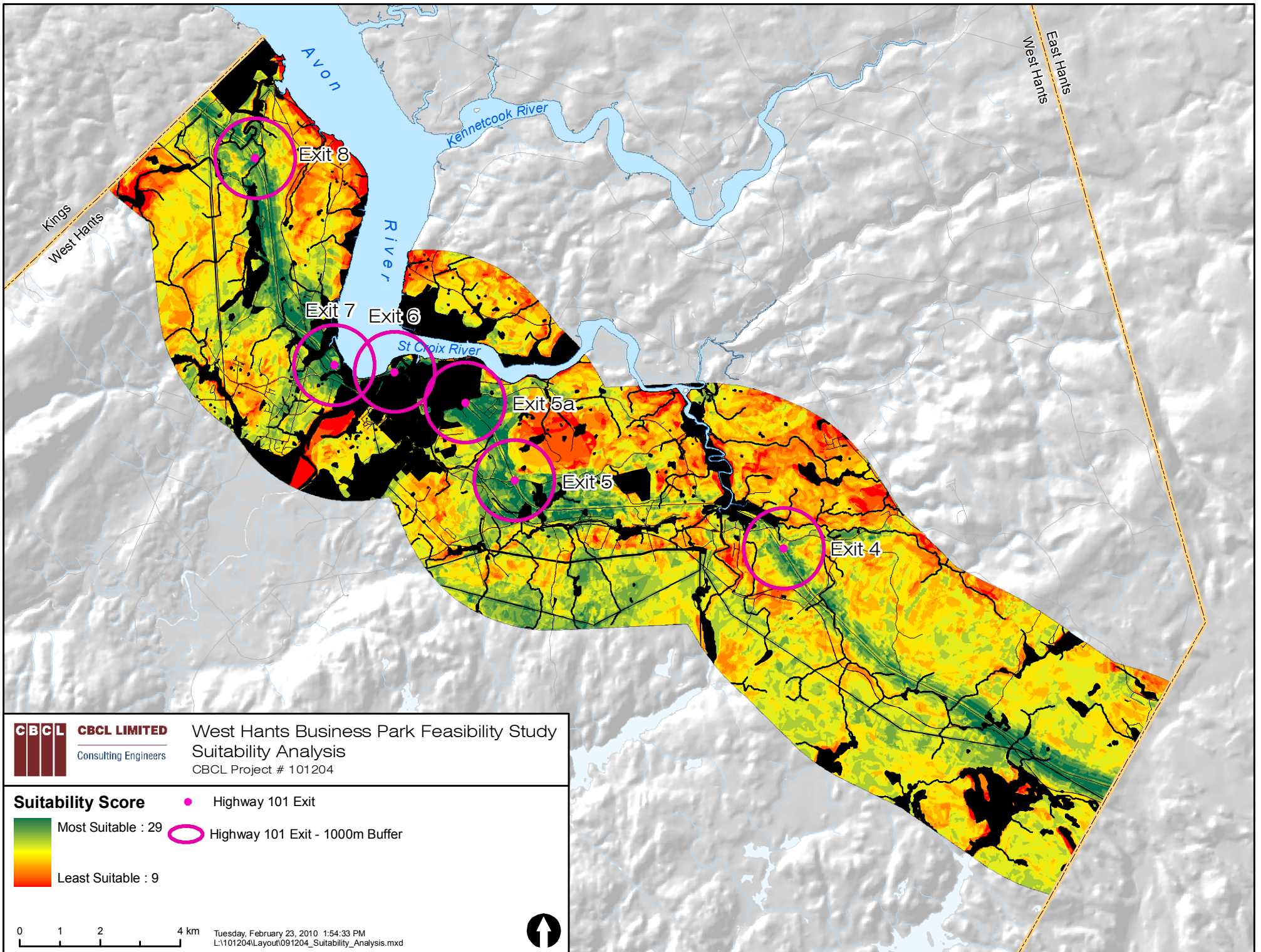
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 No-Go Areas



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Appendix B

Efforts Made to Collect Commercial / Industrial Land Availability Information and Implications for Economic Growth in the AVR

Determining Current Industrial / Commercial Park Conditions in the Annapolis Valley Region

To better understand the forces behind location decisions of businesses in the Annapolis Valley Region, and especially decisions to locate in industrial / commercial business parks we attempted to interview those responsible for marketing and selling space in the Region's parks. We also wished to gather basic information on land availability in the parks, prices and absorption rates.

After numerous attempts and methods to gather information, even the basic information, we were able to update information on only two parks. A potential buyer would certainly be dissuaded from locating in any of the Region's parks if they could not obtain easily even the most basic information on availability and price.

We found that the parks in the Region are not marketed and potential buyers could not find information on prices of availability.

The following paragraphs describe our efforts to collect information. They are presented to demonstrate the difficulties that would face potential customers.

Site selection professionals make the point that the first goal of communities vying to attract new investment is to avoid being among the first to be taken of the initial long list of potential locations. Businesses have many alternatives for locations and many locations have nearly equivalent advantages and disadvantages. Therefore, site selection consultants quickly reduce the 'long list' of possibilities to a manageable shorter list that deserves closer inspection. The difficulties in collecting even the most basic information about industrial / commercial parks would certainly see communities in the Region taken off the long list. Only investors that must locate in the Region or have local "connections" would persist in their efforts to find space in the parks.

Therefore, one of the first steps in the decision to expand the Windsor and / or Windsor – West Hants Industrial Parks must be to establish an aggressive and effecting marketing and selling function.

Methodology and Information Sources

The following sources were referenced, using the methodology as described throughout.

1. Target Nova Scotia: At the time of this writing, the web site <http://142.176.62.107/industrialparkpdfs.htm> provides an ostensibly consolidated list of all industrial parks in Nova Scotia. This site, part of Target Nova Scotia, indicates: "This is a full list of Industrial Parks and Malls in the province. Each park has an associated PDF file outlining its location, amenities, services and other information."

A review of the functioning links to the PDFs reveals that the information provided through this web site is current as of 2003 or 2004. Attempts to reach individuals indicated on the PDFs as the park contact lead to disconnected or incorrect phone numbers.

The PDFs available online provided no new information relevant for this study and in fact provided misinformation, as many of the details contained in these PDFs are outdated or wrong.

2. Web Searches: We then conducted a series of web searches based on various word combinations around industrial parks in the study area, included searches based on the park names. Apart from the partially defunct Target Nova Scotia web site, we found no useful information on individual parks or a consolidated inventory of park information in Nova Scotia.

We also visited web sites of selected municipalities and Regional Development Authorities to identify information pertaining to available land in industrial parks. This search identified current contact information for several parks however, no information was found online that would allow us to identify land developed, available, sold or available for development.

3. Telephone Interviews: A number of phone calls were placed to organizations or individuals that could be identified as relevant contacts for industrial parks. This required web searches for each of the 11 parks in the study area, as well as identification of each of the relevant municipalities with jurisdiction over the parks or in which the parks were located. As specific individuals could not be identified through the web searches, the majority of the phone calls were ‘cold calls’.

Our team made phone calls to the following organizations:

- a. Nova Scotia Business Inc.
- b. RDAs in the Valley Region
- c. Municipalities in Valley Region that are homes to industrial parks
- d. Listed contact at the Department of Transportation and Infrastructure Renewal (number no longer in service)
- e. Additional contacts provided to us for the Department of Transportation and Infrastructure Renewal (Manager of Industrial Malls, Province of Nova Scotia – Calls not returned as of this writing)
- f. Listed contact for the Windsor-West Hants Industrial Park (no longer the contact person for the park).

Several of these phone calls were followed up with e-mails.

Interview Results

Of the 11 parks located in the Region, we were only able to update those that are under the authority of NSBI.

With respect to the lack of current information available on park spaces municipal contacts and RDAs often responded to the effect that:

- ‘when this [updating this information] becomes a priority for the province, it will become a priority for us’; or
- this information is not maintained by their organization because it changes so frequently; or
- the information does not change that much from year-to-year and therefore data provided in a January 2008 CBCL/JME report is considered the most current.

New Information

The following information was provided by NSBI.

Annapolis Valley Regional Industrial Park – The industrial park is owned by NSBI and is one of their more active parks in the region. NSBI currently owns:

- Lot 7F, 1.46 ha (3.61 acres);
- Lot 66 and 67, consolidated as 0.81 ha (2 acres);
- Lot 50A and 49, consolidated as 0.73 ha (1.8 acres); and
- Lot 7F, and consolidated lots 66 and 67, are under agreements to purchase.

NSBI also owns the “future development areas” which includes a parcel near Lot 7-F of 1.5 ha (3.7 acres) for sale. The total future development area is approximately 8.09 ha (20 acres) and includes a 2.42 ha (6 acre) lot and a 3.64 ha (9 acre) lot.

Toward the Highway 101 off ramp, there are two parcels of 0.81 ha (2 acres) and 6.07 ha (15 acres) and a piece across highway (2.63 ha) that cannot be developed or sold because it does not have road access.

About 7.08 ha (17.5 acres) are not serviced.

Bridgetown Development Centre – The Bridgetown Development Centre consists of one large building with a connected large warehouse (backside of the property). There is no land available for development within the property. About 85% of the available commercial space is occupied. The warehousing space, about 3,440 m² (37,000 ft.²) is vacant. Specifications for this facility are:

- Date Constructed: 1968
- Property Size: 3.06 ha (7.55 acres)
- Gross Floor Area: 5,340 m² (57,500 ft²);
 - Floorplate: 4,620 m² (49,700 ft²) (Base)
 - 650 m² (7,000 ft²) (2nd Floor Mezzanine)
 - Leasable Space: 5,710 m² (61,464 ft²)

www.town.bridgetown.ns.ca/site/btowndocs/bdc2008.pdf

Windsor-West Hants Industrial Park - During the 1990s this area turned to industrial land and NSBI has since been approached regarding re-conveyance to local authorities.

NSBI does not own 32 and 28 as one lot 9.74 acres, which are ready for sale.

NSBI owns the pond, which cannot be developed.

The remainder of the park space is sold.

NSBI's land price is about \$50K/ha (\$20K/acre).

The contact person listed on the web site informed us that she is no longer the contact for the park.

Conclusion

The process of updating information on available industrial park space in the Annapolis Valley Region could barely have been more difficult. The difficulties stem from the existence of information that is, unfortunately, readily available online, which is outdated or incorrect and the inability to identify persons who could tell us what land was available and at what price. In addition, we were regularly 'bounced' between municipalities and regional development authorities, and still could not find information on land prices or availability.

In the end, we were only able to update information on the three parks over which NSBI has some ownership/control. NSBI was the only organization we encountered where there is a designated individual who oversees such information.

Apart from NSBI, we were referred to our team's own work from 2008, which we were told is the most current source of information on industrial parks in the study area.

As researchers unable to identify information sources for industrial land available, sold, vacant, or set aside for future development, it is disturbing to imagine what a bona fide investor might think as they seek out a suitable site for development in the study area.

There is no evidence of organised marketing, selling and administration industrial park land in the AVR.

Municipalities within which industrial parks are located appear to assume that someone else, the local regional development agency, NSBI or even the NS Department of Transportation and Infrastructure Renewal will market and sell land on behalf of the park in their municipality. Even if these agencies had such a mandate it would be extremely difficult for them to market and sell land in any one park because each of these agencies has multiple parks and municipalities within their jurisdiction. Charges of bias and favouritism would immediately rise. If a municipality wants the park(s) within its jurisdiction to compete with other parks in NS then it must take on this task.

This is the reason we have included a budget for marketing, selling and administration in our financial analysis. The success of an extension of the Windsor and/or Windsor-West Hants parks depends on an aggressive marketing and selling effort to compete with other parks in the AVR.