metrovancouver
SERVICES AND SOLUTIONS FOR A LIVABLE REGION

METRO VANCOUVER REGIONAL DISTRICT
REGIONAL PLANNING COMMITTEE

REGULAR MEETING

April 9, 2021
9:00 AM
28th Floor Boardroom, 4730 Kingsway, Burnaby, British Columbia

REVISED AGENDA[1]

1. ADOPTION OF THE AGENDA

1.1 April 9, 2021 Regular Meeting Agenda
That the Regional Planning Committee adopt the agenda for its regular meeting scheduled for April 9, 2021, as circulated.

2. ADOPTION OF THE MINUTES

2.1 March 5, 2021 Regular Meeting Minutes
That the Regional Planning Committee adopt the minutes of its regular meeting held March 5, 2021, as circulated.

3. DELEGATIONS

On Table **3.1 Blaire Chisholm, Chief Operating Officer, Poonie Group**
Subject: Employment Lands

4. INVITED PRESENTATIONS

5. REPORTS FROM COMMITTEE OR STAFF

5.1 *Metro 2050* Q1 2021 Status Update
That the Regional Planning Committee receive for information the report dated March 26, 2021, titled "*Metro 2050* Q1 2021 Status Update".

5.2 *Metro 2050* Draft Policy Language – Goal 3: Protect the Environment and Respond to Climate Change Impacts and the Implementation Section
That the MVRD Board receive for information the report dated March 26, 2021, titled "*Metro 2050* Draft Policy Language – Goal 3: Protect the Environment and Respond to Climate Change Impacts and the Implementation Section".

[1] *Note: Recommendation is shown under each item, where applicable.*

5.3 *Metro 2050* Projections Update

That the MVRD Board receive for information the report dated March 17, 2021, titled "*Metro 2050* Projections Update".

5.4 Metro Vancouver 2020 Regional Industrial Lands Inventory

That the MVRD Board:

a) receive for information the report dated March 25, 2021, titled "Metro Vancouver 2020 Regional Industrial Lands Inventory"; and

b) direct staff to distribute the report titled "Metro Vancouver 2020 Regional Industrial Lands Inventory", to member jurisdictions, the Province, the Port of Vancouver, TransLink, the Urban Development Institute, NAIOP, Vancouver Airport Authority, Agricultural Land Commission, and Squamish Lillooet and Fraser Valley Regional Districts to support ongoing efforts to protect the region's essential industrial land base for industrial activities.

5.5 Manager's Report

That the Regional Planning Committee receive for information the report dated March 31, 2021, titled "Manager's Report".

6. INFORMATION ITEMS

7. OTHER BUSINESS

8. BUSINESS ARISING FROM DELEGATIONS

9. RESOLUTION TO CLOSE MEETING

Note: The Committee must state by resolution the basis under section 90 of the Community Charter on which the meeting is being closed. If a member wishes to add an item, the basis must be included below.

10. ADJOURNMENT/CONCLUSION

That the Regional Planning Committee adjourn/conclude its regular meeting of April 9, 2021.

Membership:

Coté, Jonathan (C) - New Westminster
Froese, Jack (VC) - Langley Township
Copeland, Dan - Delta
Dueck, Judy - Maple Ridge
Gambioli, Nora - West Vancouver
Guerra, Laurie - Surrey
Hurley, Mike - Burnaby
Kirby-Yung, Sarah - Vancouver
McEwen, John - Anmore
Muri, Lisa - North Vancouver District
Steves, Harold - Richmond
Vagramov, Rob - Port Moody
van den Broek, Val - Langley City
West, Brad - Port Coquitlam

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METRO VANCOUVER REGIONAL DISTRICT
REGIONAL PLANNING COMMITTEE

Minutes of the Regular Meeting of the Metro Vancouver Regional District (MVRD) Regional Planning Committee held at 9:00 a.m. on Friday, March 5, 2021 in the 28th Floor Boardroom, 4730 Kingsway, Burnaby, British Columbia.

MEMBERS PRESENT:
Chair, Mayor Jonathan Coté*, New Westminster
Vice Chair, Mayor Jack Froese*, Langley Township
Councillor Dan Copeland*, Delta
Councillor Judy Dueck*, Maple Ridge
Councillor Nora Gambioli*, West Vancouver
Councillor Laurie Guerra*, Surrey
Mayor Mike Hurley*, Burnaby (arrived at 9:04 a.m.)
Councillor Sarah Kirby-Yung*, Vancouver (arrived at 9:07 a.m.)
Mayor John McEwen*, Anmore
Councillor Lisa Muri*, North Vancouver District
Councillor Harold Steves*, Richmond
Mayor Rob Vagramov*, Port Moody (arrived at 9:02 a.m.)
Mayor Val van den Broek*, Langley City
Mayor Brad West*, Port Coquitlam

MEMBERS ABSENT:
None.

STAFF PRESENT:
Heather McNell, General Manager, Regional Planning and Housing Services
Amelia White, Legislative Services Coordinator, Board and Information Services

1. ADOPTION OF THE AGENDA

1.1 March 5, 2021 Regular Meeting Agenda

It was MOVED and SECONDED
That the Regional Planning Committee adopt the agenda for its regular meeting scheduled for March 5, 2021, as circulated.

CARRIED

*denotes electronic meeting participation as authorized by Section 3.6.2 of the *Procedure Bylaw*

2. ADOPTION OF THE MINUTES

2.1 February 5, 2021 Regular Meeting Minutes

It was MOVED and SECONDED
That the Regional Planning Committee adopt the minutes of its regular meeting held February 5, 2021, as circulated.

CARRIED

9:02 a.m. Mayor Vagramov arrived at the meeting.

3. DELEGATIONS

No items presented.

4. INVITED PRESENTATIONS

No items presented.

5. REPORTS FROM COMMITTEE OR STAFF

5.1 *Metro 2050* Draft Policy Language – Goals 1 and 2

Report dated February 19, 2021, from Erin Rennie, Senior Planner, Regional Planning and Housing Services, providing the Committee with an opportunity to review and comment on the draft content of Goal 1 and 2 of *Metro 2050*, the updated regional growth strategy.

9:04 a.m. Mayor Hurley arrived at the meeting.
9:07 a.m. Councillor Kirby-Yung arrived at the meeting.

Members were provided a presentation on draft content for Goal 1 and 2 of *Metro 2050* highlighting the policy review summaries, the timeline for Phase 2 and 3, and the stakeholder and municipal engagement process.

Regarding draft Goal 1, "Create a Compact Urban Area", members offered the following comments:

- consider where sewerage connections can be extended to areas currently using septic systems to reduce potential environmental impacts
- support the protection and revitalization of bog lands
- incorporate the health, noise and air quality impacts along major roads
- consider ways to strengthen the Urban Containment Boundary

Regarding draft Goal 2, "Support a Sustainable Economy", members offered the following comments:

- consider expanding the area where residential uses are permitted on upper floors of lands with an Employment designation from 200m to 400m from a rapid transit station

- support the strong agricultural policies to protect agricultural land and food production

Request of Staff
Staff were requested to report back with more information on the policy to allow residential use on the upper floors of lands with an Employment land use designation in proximity to rapid transit stations.

Presentation material titled "*Metro 2050* Draft Goal 1 and Goal 2: New Content in the Update to the Regional Growth Strategy" is retained with the March 5, 2021 Regional Planning Committee agenda.

It was MOVED and SECONDED
That the MVRD Board receive for information the report dated February 19, 2021, titled, "*Metro 2050* Draft Policy Language - Goals 1 and 2".

CARRIED

5.2 Social Equity and Regional Growth Study

Report dated February 19, 2021, from Erin Rennie, Senior Planner, Regional Planning and Housing Services, conveying the results of the *Social Equity & Regional Growth Study: Considerations for integrating social equity into regional planning and Metro 2050* and a summary of opportunities for integrating the Study's findings into *Metro 2050* and other future regional planning work.

Members were provided a presentation on recommendations from the study to better incorporate social equity into the *Regional Growth Strategy* including: a refined definition of social equity; focusing policy responses on priority inequities linked to regional growth, analyzing *Metro 2050* policies from the perspective of social equity, and reviewing existing policies by drawing on gaps identified in Phase 1 of the study.

Presentation material titled "Social Equity & Regional Growth Study: Considerations for Integrating Social Equity into *Metro 2050*" is retained with the March 5, 2021 Regional Planning Committee agenda.

It was MOVED and SECONDED
That the MVRD Board receive for information the report dated February 19, 2021, titled "Social Equity and Regional Growth Study".

CARRIED

5.3 *Metro 2050* Phase 1 Engagement Report

Report dated February 22, 2021, from Erin Rennie, Senior Planner, Regional Planning and Housing Services and Lucy Duso, Policy Coordinator, External Relations, providing an update on the implementation of the *Metro 2050*

Engagement Plan, and highlighting engagement activities and input received to date.

Members were provided a presentation on Phase 1 of the engagement plan for *Metro 2050*, which involved liaising with *Metro 2050* signatories, regional stakeholders, First Nations and the general public, and outlined next steps for Phases 2 and 3 of engagement with stakeholders.

Presentation material titled "Metro 2050 Phase 1 Engagement Report: New Content in the Update to the Regional Growth Strategy" is retained with the March 5, 2021 Regional Planning Committee agenda.

It was MOVED and SECONDED
That the MVRD Board receive for information the report dated February 22, 2021, titled "*Metro 2050* Phase 1 Engagement Report".

CARRIED

5.4 Manager's Report

Report dated February 19, 2021, from Heather McNell, General Manager, Regional Planning and Housing Services, providing an update on the Regional Planning Committee 2021 Work Plan and the Policy Review Summaries including the update to *Metro 2040*, The Regional Growth Strategy.

It was MOVED and SECONDED
That the Regional Planning Committee receive for information the report dated February 19, 2021, titled "Manager's Report".

CARRIED

6. INFORMATION ITEMS

No items presented.

7. OTHER BUSINESS

No items presented.

8. BUSINESS ARISING FROM DELEGATIONS

No items presented.

9. RESOLUTION TO CLOSE MEETING

No items presented.

10. ADJOURNMENT/CONCLUSION

It was MOVED and SECONDED
That the Regional Planning Committee conclude its regular meeting of March 5, 2021.

CARRIED
(Time: 10:35 a.m.)

_____ _____

Amelia White,
Legislative Services Coordinator

Jonathan Coté, Chair

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pooni group.

March 31, 2021

Metro Vancouver
Metrotower III
4730 Kingsway
Burnaby, BC V5H 0C6

Attn: Board & Information Service

Re: Application Submission Letter to Appear as a Delegate

Please accept this application for Blaire Chisholm, Chief Operating Officer of Pooni Group, to appear as a delegate and speak at the Regional Planning Committee for Metro Vancouver on April 9, 2021.

Pooni Group is a planning consulting firm with experience working with municipalities across the Lower Mainland. Our firm has been following the Metro2050 planning process, engaging regularly with stakeholder groups also interested in the regional policy, and are working with a number of clients with employment land in the region. Our delegation will include industry representatives from the National Association of Industrial & Office Properties (NAIOP), Landlord BC and BC Non-Profit Housing Association (BCNPHA).

PRESENTATION SUMMARY

Our presentation will focus on the Metro2050 draft goals 1 and 2 and associated policies around the consideration of a mix of uses on employment lands around Skytrain stations and propose additional opportunities to better support Metro2050's goals and objectives.

We are encouraged by the draft policy language presented to the Regional Planning Committee on March 5, 2021. Transit-oriented development has been an ongoing priority in Metro Vancouver; however, many Skytrain stations are underdeveloped and utilized. New policy to focus residential and employment growth in close proximity to public transit is critical to creating complete communities.

However, we urge Metro Vancouver to consider expanding this policy further. A radius of 400 to 800 metres (5 to 7-minute walk) is widely accepted Transit-oriented development (TOD) principle, as an appropriate walking distance to transit services, particularly for rapid transit stations.

We would like to highlight the opportunities associated with allowing a mix of high density uses on employment designated lands around Skytrain stations to a more appropriate TOD principled distance, and will suggest tools that MV could consider to decrease land speculation (i.e., requiring a base economic density, permitting residential that considers affordability targets, etc.).

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Together we feel that there is important policy language that should be integrated into Metro 2050 that will support the delivery of employment spaces, affordable housing and optimize transit ridership. We also encourage Metro Vancouver to consider tools that can help accelerate regional and municipal processes, and enable the delivery of housing and employment space in a timely manner.

Our delegation to the Regional Planning Committee will elaborate on the points mentioned above.

Thank you,

_____

Blaire Chisholm, Chief Operating Officer
Pooni Group

To: Regional Planning Committee

From: Erin Rennie, Senior Planner, Regional Planning and Housing Services

Date: March 26, 2021 Meeting Date: April 9, 2021

Subject: ***Metro 2050* Q1 2021 Status Update**

RECOMMENDATION

That the Regional Planning Committee receive for information the report dated March 26, 2021, titled "*Metro 2050* Q1 2021 Status Update".

EXECUTIVE SUMMARY

This report presents the Metro 2050 Q1 2021 update. Phase 1 of the development of Metro 2050 is largely complete, and Phase 2, the development of draft policy language for Metro 2050, is well underway. In Q1 and Q2 of 2021, staff are working closely with the members of the Metro 2050 Intergovernmental Advisory Committee to draft the new and amended content for *Metro 2050*. In accordance with the Board-directed project timeline, a full draft of *Metro 2050* will be presented to the Regional Planning Committee at MVRD Board at their respective meetings in June, 2021 with a recommendation to refer the draft out for comment in Q3 and Q4.

PURPOSE

To provide an update and summary of the technical and engagement work associated with *Metro 2050* between December 2020 and March 2021.

BACKGROUND

On April 26, 2019, the MVRD Board passed a resolution to initiate a comprehensive update to *Metro Vancouver 2040: Shaping our Future (Metro 2040)*, the regional growth strategy (Reference 1). Staff committed to providing quarterly updates on the progress of *Metro 2050*. This information report provides an update on the progress of the technical and engagement work completed in Q1 2021. Previous reports on Q1, Q2, and Q3/Q4 of 2020 were presented to the Regional Planning Committee at its meetings on March 6, 2020; June 12, 2020; and November 6, 2020 respectively (References 2, 3, and 4).

TRANSITIONING FROM PHASE 1 TO PHASE 2

Phase 1 of the *Metro 2050* process (April 2019-December 2020) was centred around 11 themed policy reviews reviewing the existing policy language of the regional growth strategy and exploring new ideas to improve and update the policies, and address identified emerging regional challenges. This work featured a robust engagement program (Reference 5). The project transitioned into Phase 2 in January of 2021, with a focus on content development and review. Phase 2 includes 6 months of drafting and review in close partnership with the Metro 2050 Intergovernmental Advisory Committee. In accordance with the MVRD Board-directed project timeline, in Q2 of 2021 a full draft of *Metro 2050* will be presented to the Regional Planning Committee and Board with a recommendation to refer it out for comment in Q3 and Q4. The formal comment period will last until

December of 2021 and will include opportunities for member jurisdiction council engagement and co-hosted public information meetings with member jurisdictions on the full draft of *Metro 2050*.

METRO 2040 POLICY REVIEW PROCESS AND STATUS

The Phase 1 work focused on a series of 11 themed "*Metro 2040* Policy Reviews" designed to review the existing policies of the regional growth strategy and identify opportunities to enhance them. Table 1 below provides a status update on each Policy Review. The Policy Review process will be complete in April 2021 when the MVRD Board receives the 2050 population, housing and employment projections. "Policy Review Recommendation Summaries" for 8 of the completed Reviews have been circulated to member jurisdiction councils and staff and have been posted on the Metro Vancouver website (Reference 6).

Table 1 - *Metro 2040* Policy Review Status

TASK	STATUS	Q1 2021 PROGRESS NOTES
Housing Demand Estimates	N/A	Housing Demand Estimates will no longer be included in *Metro 2050* and instead will be provided online
Urban Centre and FTDA Policy Review	**Recommendations Endorsed**	Revised recommendations endorsed by the MVRD Board on October 2, 2020.
Projections for Population, Housing, and Job Growth to the year 2050	Completed	Engagement with municipal staff is complete and the final projections will be presented to the Regional Planning Committee in April 2021.
Agriculture Policy Review	**Recommendations Endorsed**	Revised recommendations endorsed by Regional Planning Committee on October 9, 2020.
Environment Policy Review	**Recommendations Endorsed**	Recommendations endorsed by the MVRD Board on October 2, 2020.
Transport Policy Review	**Recommendations Endorsed**	Recommendations endorsed by the MVRD Board on November 27, 2020.
Climate Change and Natural Hazards Policy Review	**Recommendations Endorsed**	Recommendations endorsed by the MVRD Board on January 29, 2021.
Housing Policy Review	**Recommendations Endorsed**	Recommendations endorsed by the MVRD Board on November 27, 2020.
Rural Lands Policy Review	**Recommendations Endorsed**	Recommendations endorsed by the MVRD Board on November 27, 2020.
Industrial and Mixed Employment Policy Review	**Recommendations Received**	Revised recommendations received by MVRD Board on October 30, 2020.
Complete Communities Policy Review	**Recommendations Endorsed**	Recommendations endorsed by the MVRD Board on November 27, 2020.
Implementation Policy Review	**Recommendations Endorsed**	Revised recommendations endorsed by the MVRD Board on February 26, 2021.
Additional Policy Work Underway to Support *Metro 2050*		
Extension of Sewerage Services Policy Review	Complete	This work was completed in 2017.
Performance Monitoring	Complete	Initial review was completed in 2017. Further updates to performance measures and methodology may be considered upon completion of each policy review.

Equity in Regional Growth Management Study – Phase 2	Complete	The final report was received by the Regional Planning Committee on March 5, 2021.
Regional Resiliency Framework	Complete	The final report will be presented to the Regional Planning Committee on April 9, 2021.

METRO 2050 ENGAGEMENT STATUS UPDATE

On October 4, 2019, the MVRD Board approved the *Metro 2050* Engagement Plan (Reference 5) which outlines four key audience groups (i.e. Signatories, Non-Signatory Regional Stakeholders, First Nations, and the General Public) and described engagement activities that had been designed for each. Engagement activities during Q1 of 2021 have included the monthly Metro 2050 Intergovernmental Advisory Committee meetings, monthly Virtual Open Houses for all stakeholder staff, and a new set of "Benefits of Regional Planning" videos that have been posted on the Metro Vancouver website and have been circulated to the public through social media channels. Table 2 below provides a summary of recent and upcoming *Metro 2050* engagement activities.

Table 2 - *Metro 2050* Engagement Summary (Q1 2021)

Audience	Activity	Details	Status
Signatories			
Member Jurisdiction Councils	Presentations on Policy Review Recommendations	Policy Review Recommendation Summaries have been mailed to all member councils with an offer to provide presentations at council meetings.	Ongoing
Member Jurisdictions Planning Staff	Intergovernmental Advisory Committee	Monthly meetings to discuss draft *Metro 2050* content.	January 22, 2021 February 19, 2021 March 19, 2021
Member Jurisdictions All Staff	Virtual Open Houses	Monthly meetings to answer questions about and discuss draft *Metro 2050* content.	January 27, 2021 February 25, 2021 March 25, 2021 April 22, 2021 (upcoming)
Member Jurisdictions All Staff	*Metro 2050* Draft Comment Forms	Opportunity to submit written Comment Forms on each Goal chapter of *Metro 2050*.	Three-week review periods corresponding with each IAC meeting.
Regional Planning Committee and MVRD Board	Engagement	Engagement on Policy Recommendations and *Metro 2050* draft sections.	October 2020-April 2021
FVRD & SLRD	Ongoing communication with adjacent regional districts	Telephone meetings with staff at Fraser-Valley and Squamish-Lillooet Regional Districts. Attendance at IAC meetings.	Ongoing as needed
TransLink	Ongoing meetings with TransLink staff on shared initiatives	• Resiliency Framework Working Group • Equity Study Working Group • Future Major Transit Growth Corridors and MTN Working Group • T2050 RAAG and Policy Coordinators meetings • T2050 Public Affairs Working Group • Attendance at IAC meetings and opportunity to submit Comment Forms	Ongoing

Non-Signatory Stakeholders			
Regional Stakeholders & Provincial Government staff	Intergovernmental Advisory Committee	Monthly meetings to discuss draft *Metro 2050* content. Opportunity to submit Comment Forms.	January 22, 2021 February 19, 2021 March 19, 2021 April 16, 2021 (upcoming) May 21, 2021 (upcoming)
Regional Stakeholders	Virtual Open Houses	Monthly meetings to answer questions about draft *Metro 2050* content.	January 27, 2021 February 25, 2021 March 25, 2021 April 22, 2021 (upcoming)
Provincial Government	Policy Review Updates	Staff-to-staff workshop on the Climate and Natural Hazards Policy Review and the Social Equity and Regional Growth Management Study.	December 3, 2020
Internal Metro Vancouver Departments	Review *Metro 2050* draft content and provide comments	Metro Vancouver Liquid Waste Services, Water Services, Solid Waste, Parks, Air Quality and Climate Change have had opportunities to review and provide comment on drafts.	Three-week review periods corresponding with each IAC meeting.
First Nations			
Kwikwetlem First Nation	Staff-to-staff meeting	Meeting to learn about Kwikwetlem First Nation interest in capacity funding.	February 17, 2021
In-Region First Nations	Intergovernmental Advisory Committee	First Nations with reserve lands inside Metro Vancouver boundaries have sent staff representation to the IAC meetings.	January 22, 2021 February 19, 2021 March 19, 2021
First Nations General	Meetings On Request	Available on request.	On request
General Public			
Residents, organizations, & businesses	*Metro 2050* Online Comment Form	Available online for residents to submit comments on *Metro 2050*. Direct email to project team is also available.	Ongoing
Residents, organizations, & businesses	Website	Provides information about *Metro 2050* process, background, and engagement opportunities.	Ongoing
Residents, organizations, & businesses	Benefits of Regional Planning Video and Social Media	Social media campaign to promote "Benefits of Regional Planning" Videos	December 14 2020 – January 4, 2021
General Public	SFU Pandemonium Panel	Presented Metro 2050 initiative as part of "Not Back to Normal: Housing post-pandemic" SFU Urban Studies Public Dialogue	January 27, 2021

PHASE 2 *METRO 2050* CONTENT DEVELOPMENT STATUS UPDATE

Staff are now developing draft policy language for *Metro 2050* Goal by Goal, using the existing text in *Metro 2040* as a 'base' on which the recommendations form the Policy Reviews are applied. The *Metro 2050* Intergovernmental Advisory Committee is playing an important role by providing a close review and comments on each draft Goal chapter. The draft revised language, including comments from the Intergovernmental Advisory Committee and internal departments, are being presented to the Regional Planning Committee by Goal area between March and May 2021, with a full draft of

Metro 2050 at the June 9, 2021 meeting. The status of each section of *Metro 2050* is listed in Table 3.

Table 3: Status of Metro 2050 Content Development (Q1 2021)

***Metro 2050* Section**	**Status (as of March 2021)**	**Regional Planning Committee Review Date**
Vision, Principles, Challenges, Executive Summary, Linkages to other Plans	Partially drafted	June 9, 2021
Population, Household, and Job Projections	Completed	April 9, 2021
Regional Land Use Designations and Regional Overlays	Segments are being developed in coordination with the associate Goal chapter. Partially drafted, partially reviewed.	March 5, 2021 April 9, 2021 May 7, 2021
Goal 1 – Create a Compact Urban Area	Reviewed by IAC	March 5, 2021
Goal 2 – Support a Sustainable Economy	Reviewed by IAC	March 5, 2021
Goal 3 – Protect the Environment and respond to Climate Change Impacts	Under IAC Review	April 9, 2021
Goal 4 – Housing	Drafted	May 7, 2021
Goal 5 – Support Sustainable Transportation Choices	Drafted	May 7, 2021
Implementation Section	Reviewed by IAC	April 9, 2021
Performance Monitoring	In progress	June 9, 2021
Maps	In progress	June 9, 2021
Full Draft of *Metro 2050*	In progress	June 9, 2021

Enhancing Engagement with First Nations

At the February 19, 2021 *Metro 2050* Intergovernmental Advisory Committee meeting, participants, including First Nations representatives, expressed a need for enhanced opportunities for First Nations engagement on *Metro 2050.* Metro Vancouver staff reviewed this request and have identified three actions to be undertaken. First Nations representatives provided input on these actions at the March IAC meeting, and they have been amended accordingly. The actions are:

- Continue to reach out directly to First Nations to find out how each wishes to be engaged in relation to *Metro 2050;*
- Convene a *Metro 2050* Indigenous Working Group (funded) for interested First Nations with an aim to providing background on regional growth strategies and the *Metro 2050* project so that participants have the background information they need to engage and to provide a forum for First Nations' comments on the draft of *Metro 2050* (likely 2-4 meetings);
- Revise IAC meeting agendas to create a better opportunity for members to hear from First Nations regarding perspectives on regional planning, growth management, affordable housing, transportation, infrastructure and other areas of expressed interest.

Staff also took the opportunity to confirm the actions already committed to related to First Nations in *Metro 2050* at the March IAC meeting. These include a land acknowledgement as well as an acknowledgement of the complexity of the planning landscape in terms of First Nations' interests. There is also a rethink of how First Nations lands, and other lands not subject to the regional growth strategy, are portrayed, and the addition of policy actions for Metro Vancouver regarding First Nations engagement, and the provision of Regional Planning services such as data, projections and research.

NEXT STEPS

Metro Vancouver staff are available on request to give presentations to member jurisdiction councils on any of the Policy Review Recommendations of interest or concern. Staff, in collaboration with the Intergovernmental Advisory Committee, will continue to develop the policy content for *Metro 2050*. Drafts of Goals 4, and 5 will be presented to the Regional Planning Committee at its upcoming meetings May, 2021. In June 2021, staff will present a full draft of *Metro 2050* to the Regional Planning Committee and MVRD Board, with a recommendation to refer the draft updated regional growth strategy out for a formal comment period between July and December 2021.

ALTERNATIVES

This is an information report. No alternatives are presented.

FINANCIAL IMPLICATIONS

There are no financial implications to this report; it was undertaken as part of Regional Planning's regular work program and Board-approved 2021 Regional Planning budget.

CONCLUSION

Metro Vancouver is updating the regional growth strategy, and it will be called *Metro 2050*. Phase 1 of the *Metro 2050* process focused on 11 Policy Reviews which were separate themed policy analysis projects and engagement initiatives to review the existing policies of *Metro 2040* and identify opportunities for improvement. Phase 1 and the Policy Reviews are now substantially complete. As of January 2021, the project transitioned to Phase 2, the focus of which is drafting policy text for *Metro 2050* using the text from *Metro 2040* as a base. A summary of the engagement activities that took place between December 2020 and March 2021 is provided in this report, as well as a status of each section of *Metro 2050*. A full draft of *Metro 2050* is anticipated in June of 2021, and the initiation of a formal comment period occurring in Q3/Q4.

References

1. Towards *Metro 2050*: Updating *Metro Vancouver 2040*: *Shaping our Future*, report dated March 28, 2019
2. *Metro 2050* Q1 2020 Status Update, report dated February 20, 2020
3. *Metro 2050* Q2 2020 Status Update, report dated May 20, 2020
4. *Metro 2050* Q3/4 2020 Status Update, report dated October 14, 2020
5. *Metro 2050* Engagement Plan, report dated August 15, 2019
6. *Metro 2050* Webpage
7. *Metro 2050* Phase 1 Engagement Report, report dated February 22, 2021

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SERVICES AND SOLUTIONS FOR A LIVABLE REGION

To: Regional Planning Committee

From: Erin Rennie, Senior Planner, Regional Planning and Housing Services

Date: March 26, 2021 Meeting Date: April 9, 2021

Subject: ***Metro 2050* Draft Policy Language – Goal 3: Protect the Environment and Respond to Climate Change Impacts and the Implementation Section**

RECOMMENDATION

That the MVRD Board receive for information the report dated March 26, 2021, titled "*Metro 2050* Draft Policy Language – Goal 3: Protect the Environment and Respond to Climate Change Impacts and the Implementation Section".

EXECUTIVE SUMMARY

Metro Vancouver staff, working with the *Metro 2050* Intergovernmental Advisory Committee, have developed draft content for *Metro 2050*'s Goal 3: Protect the Environment and Respond to Climate Change Impacts (Goal 3) and the Implementation Section. The content was prepared based on the MVRD Board endorsed policy recommendations for the Environment, Climate Change, and Implementation Policy Reviews.

The proposed changes to Goal 3 include:

- the addition of a Sensitive Ecosystem Inventory map with associated policies;
- a collective vision for ecosystems with aspirational regional targets for land protection (50%) and tree canopy cover (40%);
- new policies and tools to support the protection of important ecosystems, urban forest and invasive species management, and consideration of ecosystem services;
- better connection of local policies to the regional greenhouse gas emissions reduction targets;
- policies that seek to protect existing communities from natural hazard risks, and encourage new growth in lower risk areas; and
- policies to integrate emergency management, utility planning, and climate change adaptation principles when preparing land use and transportation plans.

The proposed changes to the Implementation section include:

- replacing the requirement for a regional Public Hearing for Type 2 amendments with alternative forms of public engagement; and
- policies to guide the implementation of new directions identified in the five Goals sections of *Metro 2050*.

PURPOSE

To provide the Regional Planning Committee and MVRD Board with the opportunity to review and comment on the draft content of Goal 3 and the Implementation section of *Metro 2050,* the updated regional growth strategy.

BACKGROUND

Between September 2020 and April 2021 the Regional Planning Committee and MVRD Board endorsed or received the recommended policy directions of all 11 *Metro 2040* Policy Reviews. The draft strategies contained in Goal 3 have been prepared based on the directions associated with the Environment and Climate and Natural Hazards policy reviews (Reference 1). Metro Vancouver staff have been working through the strategies of Goal 3 with the members of the *Metro 2050* Intergovernmental Advisory Committee, and they are now ready for the Regional Planning Committee and MVRD Board review.

METRO 2050 INTERGOVERNMENTAL ADVISORY COMMITTEE

The *Metro 2050* Intergovernmental Advisory Committee (IAC) is a staff advisory committee comprising planning directors from Metro Vancouver member jurisdictions, adjacent regional districts, TransLink, the Ministry of Municipal Affairs, First Nations from within the region, the Vancouver Airport Authority, the Port of Vancouver, the Agricultural Land Commission, and select post-secondary institutions. Establishing an IAC is a legislative requirement under the *Local Government Act* when creating or updating a regional growth strategy, and is intended to advise on its content and implementation.

The *Metro 2050* IAC held its first meeting early in 2020, and has been meeting monthly starting in January of this year to work through draft policy language goal by goal. Staff acknowledge and appreciate the constructive dialogue, comments and input from the many partner agencies and organizations that have been involved to date, to help make *Metro 2050* an accurate reflection of the regional federation's shared vision to manage growth coming to the region.

The content of Goal 3 has been reviewed by the IAC, but at the time of writing of this report, the comment period had not yet ended. Therefore, while the Goal 3 draft content attached to this report does not include IAC comments (Attachments 1 – 7), IAC members' comments will be considered and integrated into the draft content in the coming weeks. The Implementation section has been reviewed by the IAC and their comments have been incorporated (Attachment 9).

METRO 2050 GENERAL CHANGES

A 'marked up' version of *Metro 2040* has been prepared for ease of communicating the proposed policy changes (Attachments 1 to 7, and 9). The column on the right-hand side of the attachments explains the rationale for any proposed wording changes and, where applicable, the previous policy action reference number from *Metro 2040* is noted. New policies are highlighted as red text. Where appropriate, staff have proposed minor 'housekeeping' changes to text throughout to provide additional clarity, consistency, or update terminology as needed. Some general changes that are being applied to the overall content include:

- the term "municipality" has been revised to read "member jurisdiction";
- actions that were previously categorized as "requested of other agencies" have now been re-written as advocacy actions for Metro Vancouver; the exception being actions for TransLink as it is a signatory to *Metro 2050*;
- new strategy rationale sections have been added documenting the intention of each individual strategy; and
- where appropriate, the linkage of any policy action or strategy to climate change mitigation and adaptation has been highlighted.

DRAFT *METRO 2050* - GOAL 3

Although *Metro 2050* is an update and not a new regional growth strategy, staff are recommending fairly significant changes to Goal 3 to reflect the pressing need to respond to the climate crisis and to ensure that ecosystems remain healthy so that current and future generations continue to benefit from the essential services nature provides, such as carbon storage, fresh water, clean air, food, mental and physical health. These changes stem from input and feedback from member jurisdictions and other stakeholders. Definitions of Key Terms used in Goal 3 are provided in Attachment 8 to support the review.

The draft version of Goal 3 includes new and enhanced policy language that support the protection of important ecosystems, reduce greenhouse gas emissions, and increase the resilience of communities to climate change and natural hazards. The draft of Goal 3 also includes:

- clarification of the intended uses within the Conservation and Recreation regional land use designation and tracking of ecosystem losses and gains in Natural Resource Areas (Strategy 3.1);
- a collective vision for ecosystems with aspirational land protection (50%) and tree canopy cover targets (40%);
- the addition of a Sensitive Ecosystem Inventory map with associated policies;
- supportive policies to connect a regional green infrastructure network, consider ecosystem services, and manage urban forests and invasive species (Strategy 3.2);
- updated policies for the provincial and federal governments and their agencies and member jurisdictions based on best practices in the buildings and energy sector;
- strengthened policy language to better connect member jurisdiction land use and transportation policies to the regional greenhouse gas emissions reduction targets;
- an expanded scope for Metro Vancouver policies to work with other stakeholders on climate change and natural hazards resilience challenges, and new advocacy actions to the provincial and federal governments and their agencies;
- clarified policies for member jurisdictions to distinguish between protecting existing communities from natural hazard risks and encouraging new growth in lower risk areas;
- supportive policies to integrate emergency management, utility planning, and climate change adaptation principles when preparing land use and transportation plans; and
- identifying major climate change impacts and natural hazards affecting the Metro Vancouver region.

DRAFT *METRO 2050* - IMPLEMENTATION

The Implementation Section of the regional growth strategy includes the procedures for administering the strategy, including strategies pertaining to developing Regional Context Statements, making amendments to the regional growth strategy, and provisions for municipal flexibility. They also describe the roles and relationships between different entities such as TransLink. Proposed changes to the Implementation Section (Attachment 9) are largely administrative and reflect recent discussions and decisions at the Regional Planning Committee and MVRD Board regarding the *Metro 2040* Implementation Policy Review recommendations (Reference 1). The key changes proposed in the draft Implementation section include:

- replacing the requirement for a regional Public Hearing for Type 2 amendments with alternative forms of meaningful public engagement;
- updating references to *Local Government Act* sections throughout;
- clarifying the requirements for Electoral Area A, which are different than other member jurisdictions;
- adding references to a new Trade-Oriented lands overlay;
- adding a new section further defining the roles and responsibilities of TransLink, based on the *South Coast British Columbia Transportation Authority Act*;
- providing additional clarity regarding Regional Context Statements, Special Study Areas, implementation guidelines, and regional sewerage area extension provisions; and
- adding a new glossary of key terms used throughout *Metro 2050*.

It is noted that one of the recommendations of the *Metro 2040* Industrial and Mixed Employment policy review proposed altering the amendment type for a regional land use designation change for Industrial lands from a Type 2 instead of a Type 3. This proposal was considered by MVRD Board at its meeting on February 26, 2021, and the Board determined not to pursue this amendment. As a result, it is not included in the draft Implementation section attached to this report.

NEXT STEPS

Staff anticipate receiving comments and revisions on the draft Goal 3 content from the *Metro 2050* Intergovernmental Advisory Committee in the coming weeks. In May 2021, staff will be presenting a staff report on Goals 4 and 5 to the Regional Planning Committee and MVRD Board for review.

ALTERNATIVES

This is an information report. No alternatives are presented.

FINANCIAL IMPLICATIONS

There are no financial implications to this report; it was undertaken as part of Regional Planning's regular work program and Board-approved 2021 Regional Planning budget.

CONCLUSION

Metro Vancouver staff, with the support of the *Metro 2050* Intergovernmental Advisory Committee, are currently drafting new and amended content for *Metro 2050*, by goal area, based on the MVRD Board endorsed policy review recommendations. On March 5, 2021 the Regional Planning Committee

received the draft content for Goals 1 and 2, and the draft policy content for Goal 3 and the Implementation Section are now being presented for discussion. The draft strategies of *Metro 2050* build on the successes of *Metro 2040*, using the existing policy content as a 'base' to make improvements and enhancements to further the integration of land use and transportation, protect important lands, and support the effective implementation of the shared regional vision.

The content of Goals 4 and 5 is being drafted and will be presented to the *Metro 2050* Intergovernmental Advisory Committee at its upcoming monthly meetings, and will then be provided to the Regional Planning Committee for discussion. In accordance with the approved project schedule, in June 2021 staff will present a complete draft of *Metro 2050* to the Regional Planning Committee and MVRD Board for consideration, with a recommendation that it be referred out for formal comment between July and December 2021.

Attachments *(44627734)*

1. *Metro 2050* Draft Goal 3, Designations and Overlays
2. *Metro 2050* Draft Goal 3, Protect the Environment and Respond to Climate Change and Natural Hazards
3. *Metro 2050* Draft Goal 3, Strategy 3.1
4. *Metro 2050* Draft Goal 3, Strategy 3.2
5. *Metro 2050* Map 10 – Sensitive Ecosystem Inventory
6. *Metro 2050* Draft Goal 3, Strategy 3.3
7. *Metro 2050* Draft Goal 3, Strategy 3.4
8. *Metro 2050* Draft Goal 3, Key Terms
9. *Metro 2050* Draft Implementation Section

References

1. *Metro 2040* Policy Review Summaries
2. Towards *Metro 2050*: Updating *Metro Vancouver 2040: Shaping our Future*, Section E 2.4, MVRD Board, April 26, 2019
3. *Metro 2050* Q3/Q4 2020 Status Update, Regional Planning Committee, November 6, 2020

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Section D Regional Land Use Designations and Overlays (GOAL 3 CONTENT ONLY) (*Metro 2040* p9/10)	
Proposed Metro 2050 Text	**Rationale for Change**
Non-Urban Land Use Designations	
Conservation and Recreation Conservation and Recreation areas are intended to protect significant ecological and recreation assets, including: drinking water supply areas, environmental conservation areas, wildlife management areas and ecological reserves, forests, wetlands, riparian areas, major parks and outdoor recreation areas (e.g. ski hills and other tourist recreation areas).	Minor revisions to ensure consistency with uses listed under revised policy 3.1.9 b), as per Environment Policy Review Recommendation #1 (to clarify uses in the Conservation and Recreation regional land use designation). Changed 'drinking watersheds' to 'drinking water supply areas' as requested by Metro Vancouver Water Services staff.
Regional Overlays	
Natural Resource Areas Overlay Natural Resource Areas are intended to illustrate existing approved natural resource uses within the Conservation and Recreation regional land use designation that are not entirely consistent with the intent of the designation, but continue to reflect its long term intent. These uses include a landfill; quarries; lands with active forest tenure managed licenses; and wastewater and drinking water treatment facilities.	Environment Policy Review Recommendation #1 was to clarify the Conservation and Recreation regional land use designation, including recognition of existing, provincially-approved natural resource extraction. The Natural Resource Areas overlay will assist with tracking and reporting ecosystem losses/gains within the Conservation and Recreation designation and would be updated by Metro Vancouver every six years in alignment with other regional ecological health datasets (e.g. land cover, Sensitive Ecosystem Inventory, canopy cover). Map 8 (Conservation and Recreation Areas) will be revised to show the Natural Resource Areas overlay.

44627734

Goal: 3 Protect the Environment and Respond to Climate Change and Natural Hazards

PREAMBLE (p33)

Proposed Metro 2050 Text	Rationale for Change
Metro Vancouver has a spectacular natural environment. Many of Metro Vancouver's ecosystems have global significance, providing both internationally-important fish habitat and key feeding and resting points for migratory birds along the Pacific Flyway. The region's forests, fields, coastal and intertidal areas, wetlands, and watercourses together are integral pieces of a habitat network for birds, fish, and other wildlife. Indigenous peoples, whose territories fall within this region, have stewarded these lands, waters, and the ecosystems they support since time immemorial.	Minor changes. New wording to reflect ancestral and present day stewardship by Indigenous peoples.
Although nature is critically important in its own right, these diverse mountain, coastal, and river areas also provide the region's residents with essential ecosystem services such as fresh water, clean air, pollination, indigenous food and medicines, flood control, cooling, carbon storage, and opportunities for tourism, recreation, cultural and spiritual enrichment, and mental respite. Climate change, development, invasive species, and other human-induced pressures are causing ecosystem change and loss in many areas, which reduces nature's capacity to provide these life-sustaining services. If planned, designed, and built in harmony with nature, communities will be heathier and more resilient over the long term.	Significantly reworded to include: - ecosystem services, including indigenous food, physical and mental health, and climate benefits from the natural environment, and - a reality check statement about ecosystem change and loss.
The key tenets of the regional growth strategy, such as the ongoing focus on urban containment, and land use patterns that support sustainable transportation options and carbon storage opportunities in natural areas, are critical for the region to address climate change. This section contains a strategy and associated policies that support the regional commitment to reach carbon neutrality by the year 2050. By then, climate change is expected to have cause warmer temperatures, a reduced snowpack, increasing sea levels, and more intense and frequent drought and rainfall events. An additional strategy aims to improve resilience to these climate change impacts, since many of the region's natural hazards will be worsened by a changing climate.	Updated to delineate more clearly between Strategy 3.3 (GHG emissions reduction) and 3.4 (resilience to climate change and natural hazards), and to emphasize the interconnections between climate change and natural hazards.
Strategies to achieve this goal are: 3.1 Protect Conservation and Recreation lands 3.2 Protect, restore, and connect ecosystems 3.3 Encourage land use, infrastructure, and settlement patterns that reduce energy consumption and greenhouse gas emissions, create carbon storage opportunities, and improve air quality 3.4 Encourage land use, infrastructure, and settlement patterns that improve the ability to withstand climate change impacts and minimize natural hazard risks	Slight rewording of Strategy 3.2 to focus on ecosystems (compared to 'natural features and their connectivity'). The addition of "settlement patterns" to the title of Strategy 3.3 and 3.4 emphasizes the carbon storage benefits that are preserved in the region's natural areas when growth and development occurs in infill areas, as well as the influence of land use and growth management on resilience outcomes.

Goal: 3

Strategy 3.1

#	Proposed Metro 2050 Text	Rationale for Change
3	Protect the Environment and Respond to Climate Change and Natural Hazards	Added 'Natural Hazards' to raise the profile of new policies under 3.4.
3.1	Protect Conservation and Recreation lands	
	Strategy Rationale: The Conservation and Recreation regional land use designation is intended to help protect significant ecological and recreation assets throughout the region. Protecting these assets from development will ensure that these lands remain productive, resilient, and adaptable, providing vital ecosystem services that support both humans and wildlife, while also safeguarding communities from climate change and natural hazard impacts.	Each Strategy includes a new rationale.
	Metro Vancouver will:	
3.1.1	Direct the Greater Vancouver Sewerage and Drainage District (GVD&DD) to not allow connections to regional sewerage services to lands with a Conservation and Recreation regional land use designation. Notwithstanding this general rule, in the exceptional circumstances specified below, the MVRD Board will advise the GVS&DD Board that it may consider such a connection for existing development or for new development where, in the MVRD Board's opinion, that new development is consistent with the underlying Conservation and Recreation regional land use designation and where the MVRD Board determines either: a) that the connection to regional sewerage services the only reasonable means of preventing or alleviating a public health or environmental contamination risk; or b) that the connection to regional sewerage services would have no significant impact on the strategy to protect lands with a Conservation and Recreation regional land use designation.	Minor updates to organization name.
3.1.2	Implement the Metro Vancouver *Regional Parks Plan* and the *Regional Parks Land Acquisition 2050 Strategy* and work collaboratively with member jurisdictions to identify, secure and enhance habitat and park lands, and buffer park and conservation areas from activities in adjacent areas.	Update to plan titles.
3.1.3	For the Greater Vancouver Water District and the GVS&DD, avoid ecosystem fragmentation and loss on lands with a Conservation and Recreation regional land use designation when developing and operating infrastructure, but where unavoidable, mitigate the impacts, including ecosystem restoration and striving for no net ecosystem loss.	New policy for the GVWD and GVS&DD consistent with *Metro 2040* Action 3.1.5 for the Province, utility companies, and TransLink. This policy would apply to new major infrastructure projects within the Con/Rec designation.
3.1.4	Monitor ecosystem gains and losses on lands with a Conservation and Recreation regional land use designation and the Natural Resource Areas therein, as identified on the Conservation and Recreation Areas Map (Map 8).	New proposed policy. Environment Policy Review Recommendation #1 was to clarify appropriate uses within the Con/Rec designation, including recognition of existing

		provincially or federally-approved natural resource extraction (timber harvesting, gravel mining, a landfill, and water and wastewater treatment plants), which would be tracked through a new Natural Resource Areas overlay (defined in Section D).
3.1.5	Advocate to the Province and its agencies, utility companies, and TransLink to avoid ecosystem fragmentation on lands within a Conservation and Recreation regional land use designation when developing and operating utility and transportation infrastructure, but where unavoidable, to mitigate the impacts, including ecosystem restoration and striving for no net ecosystem loss.	Edits to *Metro 2040* Policy 3.1.5. All actions for non-signatories will change to advocacy actions for Metro Vancouver. Strengthened language since Metro Vancouver is now advocating.
3.1.6	Advocate to the Province and its agencies to actively manage provincially-owned land within a Conservation and Recreation regional land use designation, and effectively buffer these lands from activities in adjacent areas, with the intent of enhancing ecosystem integrity and public recreational opportunities.	Edits to *Metro 2040* Policy 3.1.6 to increase consistency, add buffering, and replace 'natural assets' with 'ecosystem integrity' (which includes function and biodiversity).
3.1.7	Advocate to the Federal Government, the Province, and their agencies to: a) recognize the Conservation and Recreation regional land use designation and ensure that their activities within or adjacent to these areas are consistent with the intent of the land use designation; b) consult and collaborate with all levels of government, First Nations, and others in the planning of lands with a Conservation and Recreation regional land use designation, including during the review of future natural resource extraction projects.	Edits to *Metro 2040* Policy 3.1.7 to include First Nations, and improve understanding and tracking for the Natural Resource Areas overlay.
3.1.8	Accept Regional Context Statements that protect land within the Conservation and Recreation regional land use designation, that meet or work towards Action 3.1.9.	Minor wording changes.
	Member jurisdictions will: Adopt Regional Context Statements that:	
3.1.9	a) identify Conservation and Recreation areas and their boundaries on a map generally consistent with the Regional Land Use Designations map (Map 2);	No change.
	b) include policies that support the protection of lands within a Conservation and Recreation land use designation, generally consistent with limiting the permitted uses on these lands to the following: i) drinking water supply areas; ii) environmental conservation areas; iii) wildlife management areas and ecological reserves; iv) forests; v) wetlands (e.g. freshwater lakes, ponds, bogs, fens, estuarine, marine, freshwater, and intertidal ecosystems); vi) riparian areas (i.e. the areas and vegetation that surrounds wetlands, lakes, streams, and rivers); vii) major parks and outdoor recreation areas; viii) uses within those areas that are appropriately located, scaled, and consistent with the intent of the	Environment Policy Review Recommendation #1 called for the clarification of the definition of appropriate uses and activities within the Con/Rec designation. These edits ensure consistency with the definition of Con/Rec on *Metro 2040* Page 10. Metro Vancouver Water Services staff requested replacement of 'public service infrastructure, including the supply of high quality drinking water' with the term 'drinking water supply areas'. Public water infrastructure would be included in the Natural Resource Areas

	designation, including: • education, research and training facilities, and associated uses that serve conservation and/or recreation users, • commercial uses, tourism activities, and public, cultural, or community amenities, and • limited agricultural use, primarily soil-based; and ix) ecosystems not covered above that may be vulnerable to climate change and natural hazard impacts, or that provide buffers to climate change impacts for communities;	overlay. Wetlands and riparian areas are defined for clarity. ix - The *Metro 2040* Climate Policy Review recommended the inclusion of ecosystems at risk from climate change impacts within Con/Rec. Additional areas would be informed by future risk assessments (see Strategy 3.4).
	c) include policies that: i) protect the integrity of lands within a Conservation and Recreation land use designation from activities in adjacent areas by requiring edge planning, and introducing measures such as physical buffers or development permit requirements; and	Edits to *Metro 2040* policy 3.1.4 c) that mimic *Metro 2040* policy 2.3.6 b) iv) for agricultural lands. Edge management, buffers, and DPAs are effective planning strategies to protect ecosystem integrity.
	ii) encourage the consolidation of small parcels, and prevent subdivision and fragmentation of lands within a Conservation and Recreation land use designation.	New policy that mimics *Metro 2040* policy 2.3.6 b) ii) for agricultural lands and associated changes for *Metro 2050*. New policy, mimicking an existing policy action for agricultural lands. Large, connected, and biodiverse ecosystems are generally healthier and more resilient to climate change impacts.

Goal: 3

Strategy 3.2

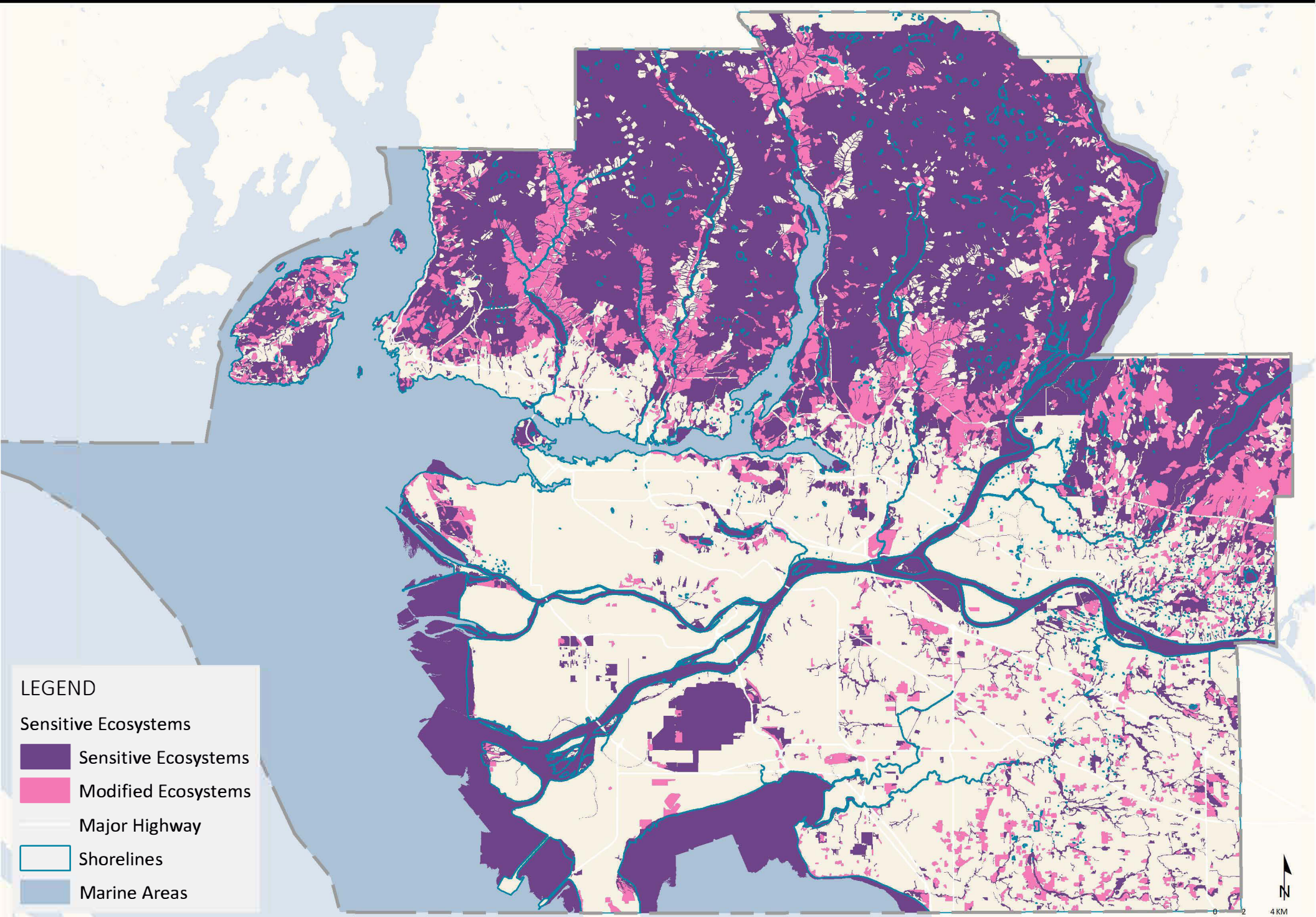
#	Proposed Metro 2050 Text	Rationale for Change
3	Protect the Environment and Respond to Climate Change and Natural Hazards	Added 'Natural Hazards' to raise the profile of new policies under 3.4.
3.2	**Protect, restore, and connect ecosystems**	Updated and simplified language.
	Strategy Rationale: This Strategy establishes a collective vision for ecosystems across the region, recognizing the scientific evidence that 'Nature Needs Half' of the land base to function for the benefit of all life and support human well-being. The vision can be realized by working together to protect, enhance, and restore ecosystems, strategically linking green spaces into a region-wide network that enables the flow of ecosystem services and movement of wildlife across the landscape. Actions to enhance tree canopy cover in urban areas will improve community resilience by intercepting rainwater, moderating the urban heat island effect, and improving health outcomes.	Each Strategy includes a new rationale.
	Metro Vancouver will:	
3.2.1	Implement the strategies and actions of the regional growth strategy that contribute to regional targets to: a) increase the area of lands protected for nature to 50% of the region's land base by the year 2050, in support of the Nature Needs Half vision; and	New proposed policy. Environment Policy Review Recommendation #2 was to "include a new regional vision for protecting, enhancing, and restoring ecosystems by setting aspirational regional targets", and the International 'Nature Needs Half' vision was proposed as an option. Further analysis has revealed that roughly 40% of the region's land base is currently protected as conservation or wildlife management areas, municipal or regional parks. It would be feasible to protect 50% of the land base, while also accommodating planned greenfield urban and industrial development, if the remainder of the sensitive and modified ecosystems from the Sensitive Ecosystem Inventory (SEI), and additional small young forested areas (1-5 ha) are protected from development.
	b) Increase the total tree canopy cover within the Urban Containment Boundary from 32% to 40% by the year 2050.	New proposed policy. Environment Policy Review Recommendation #5 was to include policies regarding emerging environmental planning priorities, including urban forest management. Canopy cover in the UCB is currently 32% and a 40% target is achievable without all member jurisdictions needing to meet 40%. For those below 40%,

		increases would be needed. Those above 40% would need to retain their canopy cover. Achieving 40% canopy cover within the Urban Containment Boundary would increase community resiliency by reducing urban temperatures and associated heat-related morbidity and mortality, improving mental health, and intercepting rainwater.
3.2.2	Implement the Metro Vancouver *Ecological Health Framework*, including relevant actions to: a) Collect and maintain data, including the Sensitive Ecosystem Inventory, tree canopy cover, imperviousness, and carbon storage datasets; report on gains/losses and climate-related impacts on ecosystems; and share these datasets with member jurisdictions; and	New proposed policies. Environment Policy Review Recommendations #4 to incorporate the SEI and #5 to reflect emerging environmental planning priorities (urban forestry, invasive species, ecosystem services) in *Metro 2050*. Provincial staff suggested including key relevant actions for MVRD from the *Ecological Health Framework* (EHF), which identifies Metro Vancouver's role in protecting and enhancing ecological health as it relates to its services and functions. Regional Planning's main roles noted in the EHF are data collection and ecosystem services guidance.
	b) incorporate ecosystem services into Metro Vancouver's corporate planning and investments, and provide regionally-appropriate guidance on methodologies, tools and decision-making frameworks.	
3.2.3	Manage Metro Vancouver assets and collaborate with member jurisdictions, First Nations, and other agencies to: a) protect, enhance, and restore ecosystems as identified on the Sensitive Ecosystem Inventory Map (Map 10);	Revised *Metro 2040* policy 3.2.2 to replace the Map 10 'Natural Features and Land Cover' with the SEI, as per Environment Policy Review Recommendation #4 to incorporate the SEI.
	b) identify a regional green infrastructure network that connects ecosystems and builds on existing local networks, while maximizing the climate adaptation, biodiversity, and human health benefits; and	New proposed policy. Collaboration toward a regional green infrastructure network was Environment Policy Review Recommendation #3. Green infrastructure includes the natural assets (e.g. forests, wetlands, soil), enhanced assets (e.g. rain gardens, bioswales, urban trees), and engineered assets (e.g. green roofs, permeable pavement) that collectively provide society with ecosystem services.
	c) prepare Guidelines to support the implementation of a regional green infrastructure network and to assist with the protection, enhancement, and restoration of ecosystems as identified on Sensitive Ecosystem Inventory Map (Map 10).	New proposed policy to support Environment Policy Review Recommendations #3 and #4.
3.2.4	Work with local First Nations communities to: a) increase understanding of Indigenous ecological knowledge, and share information about environmental research, policy development, and planning best practices; and b) find joint stewardship and restoration opportunities on Metro Vancouver sites, and expand access to sustainably cultivate and harvest plants for cultural purposes.	New proposed policies to support reconciliation.

3.2.5	Advocate to the Federal Government, the Province, and their agencies to: a) enhance species-at-risk and ecosystem protection legislation that protects critical habitat, and supports restoration and biodiversity, in addition to convening a local government support network; and	*Metro 2040* policy action 3.2.9 was changed to an advocacy action for Metro Vancouver. Provincial staff recommended a revision to mention the existing local government support network.
	b) support the uptake of nature-based climate solutions, including those that protect or restore foreshore ecosystems.	This new advocacy policy was proposed through the *Metro 2040* Climate Policy Review to acknowledge the need to better protect foreshore/intertidal ecosystems that are vulnerable to coastal squeeze.
3.2.6	Accept Regional Context Statements that advance the protection, restoration, and connection of ecosystems in a regional green infrastructure network, and that meet or work towards Action 3.2.7.	Updated *Metro 2040* policy 3.2.3 with current language.
	The role of member jurisdictions is to: Adopt Regional Context Statements that:	
3.2.7	a) identify local ecosystem protection and tree canopy cover targets, and demonstrate how these targets will contribute to the regional targets in 3.2.1;	New proposed policy. Corresponding member jurisdiction policy action to support the proposed regional targets (new 3.2.1 above). Proposed policy structure is similar to *Metro 2040* policy 3.3.4a) regarding contributions toward regional greenhouse gas emission reduction targets.
	b) refer to the Sensitive Ecosystem Inventory Map (Map 10) and / or other relevant ecological datasets and include policies that: i. support the protection, enhancement, and restoration of ecosystems through measures such as land acquisition, density bonusing, development permit requirements, subdivision design, conservation covenants, land trusts, tax exemptions;	Combined *Metro 2040* policies 3.2.4 and 3.2.6. Revised *Metro 2040* policies to replace the Map 10 'Natural Features and Land Cover' with the SEI, as recommended through Environment Policy Review Recommendation #4. This Map provides a science-based inventory of the most ecologically important ecosystems across the region. The intent and policies of the underlying regional land use designations would still apply. The SEI will be updated in 2022 and the Map updated every six years thereafter.
	ii. seek to acquire, restore, and protect lands, in collaboration with adjacent member jurisdictions and other partners, that will enable ecosystem connectivity in a regional green infrastructure network;	New proposed policy. Collaboration toward a regional green infrastructure network was Environment Policy Review Recommendation #3.
	iii. discourage or minimize the fragmentation of ecosystems through low impact development practices that enable ecosystem connectivity; and	New proposed policy to support Environment Policy Review Recommendation #3 and accommodate some low impact greenfield development.
	iv. indicate how the interface between ecosystems and other land uses will be managed to maintain ecological integrity using edge planning, and measures such as physical buffers, or development permit requirements.	Modified *Metro 2040* policy 3.2.6 regarding buffering to mimic *Metro 2040* policy 2.3.6 b) iv for agricultural lands.

	c) include policies that: i. support the consideration of ecosystem services in land use decision-making and land management practices;	New proposed policies in support of *Metro 2040* Environment Policy Review Recommendation #5 to incorporate emerging environmental planning priorities (ecosystem services, urban forestry, and invasive species) into *Metro 2050*.
	ii. enable the retention and expansion of urban forests using various tools, including but not limited to, local tree canopy cover targets, urban forest management strategies, tree protection bylaws, development permit requirements, street tree planting, and reforestation / restoration policies;	
	iii. reduce the spread of invasive species by employing best practices, such as the implementation of soil removal and deposit bylaws, development permit requirements, and integrated pest management plans;	
	iv. support watershed and ecosystem planning, Integrated Stormwater Management Plans, and water conservation objectives; and	Housekeeping. Combined *Metro 2040* 3.2.7 and 3.3.4 d).
	v. increase green infrastructure along the Regional Greenways Network in collaboration with Metro Vancouver, TransLink, and other partners to the Major Transit Network, community greenways, and other locations, where appropriate.	New proposed policy. Greenway policies would move to Goal 5, but this 'greening the Greenways' policy would remain under Goal 3.
3.2.5		*Metro 2040* policy 3.2.5 regarding the Regional Greenways Network will be moved to Goal 5.
3.2.6		*Metro 2040* policy 3.2.6 regarding ecologically important systems, features, corridors and establishing buffering combined into 3.2.7 b) i and iv.
3.2.7		*Metro 2040* policy 3.2.7 regarding watershed and ecosystem planning, and ISMPs combined with 3.3.4 d) moved under new 3.2.7 c) iv.
3.2.8		*Metro 2040* policy 3.2.8 regarding TransLink's role in the Regional Greenways Network will be moved to Goal 5.

MAP 10 - SENSITIVE ECOSYSTEMS



See glossary for definitions of Sensitive and Modified Ecosystems. An Online Sensitive Ecosystem Inventory tool is available at https://gis.metrovancouver.org/mvmaps/SEI or downloadable from http://www.metrovancouver.org/data

Regional Planning Committee

metrovancouver

Goal: 3

Strategy 3.3

#	Proposed Metro 2050 Text	Rationale for Change
3	Protect the Environment and Respond to Climate Change and Natural Hazards	Removed the word "impacts" – which is associated solely with climate change adaptation - since responding to climate change encompasses both climate change adaptation (Strategy 3.4) *and* reducing GHGs (Strategy 3.3). Added reference to natural hazards based on the title of Strategy 3.4.
3.3	**Encourage land use, infrastructure, and settlement patterns that reduce energy consumption and greenhouse gas emissions, create carbon storage opportunities, and improve air quality**	The amended language better reflects the full spectrum of GHG emission reduction benefits associated with the growth framework. The proposed edits also minimize confusion associated with the phrase "land use and transportation infrastructure". Reference to *transportation* infrastructure removed given that other forms of infrastructure are referenced in this strategy. The addition of "settlement patterns" more closely aligns with the carbon storage benefits that are preserved in the region's natural areas when growth and development occurs in infill areas.
n/a	**Strategy Rationale:** The tenets of the regional growth strategy are crucial for meeting the region's commitment to reduce greenhouse gas emissions and to reach carbon neutrality by the year 2050. As described in other strategies in the regional growth strategy, this can be achieved in three key ways: by supporting growth and development patterns that enable sustainable transportation options; by encouraging higher density built forms and multi-unit developments which are typically more energy efficient than lower density alternatives; and by reducing development pressures in areas that naturally store and sequester carbon (such as conservation and agricultural areas). To supplement these important policy actions from other goal areas in the regional growth strategy, Strategy 3.3 contains the region's greenhouse gas emissions reduction targets and associated policies.	Adding a new "strategy rationale" section after each strategy will help explain the intention the subsequent policies seek to achieve.
	Metro Vancouver will:	

3.3.1	a) Implement the strategies and actions of the regional growth strategy that contribute to regional targets to reduce greenhouse gas emissions by 45 percent below 2010 levels by the year 2030 and to achieve a carbon neutral region by the year 2050. b) Implement the Corporate Climate Action Plan, the *Clean Air Plan*, and *Climate 2050*.	Figure 3 content to be re-purposed as summary content in the front matter of *Metro 2050* (exact location to be determined). Reference to Corporate Climate Action Plan added given Liquid Waste Services department recommendation to refer to carbon neutral operations. Reference to *Clean Air Plan* and *Climate 2050* added, which aligns with Recommendation 1 of the Climate Change and Natural Hazards Policy Review (specifically, alignment with *Climate 2050*).
3.3.2	Work with the Federal Government and the Province and their agencies, TransLink, member jurisdictions, First Nations, non-governmental organizations, energy utilities, the private sector, and other stakeholders, as appropriate, to: a) monitor energy consumption, greenhouse gas emissions, and air quality related to land use, buildings, industry, agriculture, and transportation;	Buildings, industry, agriculture, and transportation GHG emission sources are quantified in Metro Vancouver's Lower Fraser Valley Air Emission Inventory and Forecast. The amended text in this section aligns with Recommendation 3 from the Climate Change and Natural Hazards Policy Review.
	b) monitor carbon storage in natural areas; and	New policy added to reflect ongoing monitoring of carbon storage in natural areas via Metro Vancouver's Carbon Storage Inventory. The amended text in this section aligns with Recommendation 3 from the Climate Change and Natural Hazards Policy Review.
	c) promote best practices and develop guidelines to support local government actions that reduce energy consumption and greenhouse gas emissions, create carbon storage opportunities, and improve air quality.	Text amended based on recommendations from the Air Quality and Climate Change division, as well as Recommendation 4 from the Climate Change and Natural Hazards Policy Review.
3.3.3	Work with member jurisdictions and health authorities to advocate that health impact assessments be conducted for major transportation projects and significant development projects with an aim to minimizing public exposure to traffic-related air pollutants.	New policy added based on recommendation from the Air Quality and Climate Change division.
3.3.4	In collaboration with TransLink and member jurisdictions, establish a definition of major development proposals, which are referenced in the *South Coast British Columbia Transportation Authority Act*, to support the objective of concentrating major trip-generating uses in areas well served by transit.	*Metro 2040* policy 3.3.5 re-framed as a new Metro Vancouver-led action. Note that this policy may have more emphasis under Goal 5.
3.3.5	Advocate to the Federal Government and the Province and their agencies to establish and support legislative and fiscal actions, that help the public and private sector maximize	*Metro 2040* policy 3.3.8 re-framed as a Metro Vancouver-led advocacy action. Text amended based on recommendations from the Air Quality

	reductions in energy consumption and greenhouse gas emissions, and improve air quality, such as: a) in the building sector, • accelerating the modernization of the BC Building Code • setting greenhouse gas performance requirements in building codes for new building construction and significant alterations to buildings • increasing incentives and financing tools for new low-carbon and resilient buildings • supporting large scale building electrification • requiring home energy labels for new and existing homes • supporting reductions in embodied emissions of buildings, and the increased use of low carbon building products • supporting programs, services and incentives for low carbon retrofit options in rental buildings that benefit building owners and tenants • incenting transit-oriented development, and • supporting, where feasible and appropriate, energy recovery, renewable energy generation and zero carbon district energy systems, and related transmission needs.	and Climate Change division, and in alignment with Recommendation 1 (specifically, alignment with *Climate 2050*) and 4 of the Climate Change and Natural Hazards Policy Review.
	b) in the transportation sector, • enabling the implementation of regional transportation demand management measures, e.g. mobility pricing • setting electric vehicle charging requirements in buildings • increasing funding for sustainable transportation infrastructure and low emission travel modes, e.g. walking and cycling, and • continuing to advance stringent standards for on-road vehicle emissions and fuel carbon content.	*Metro 2040* policy 3.3.8 moved here and re-framed as a Metro Vancouver-led advocacy action. Text amended based on recommendations from the Air Quality and Climate Change division, and in alignment with Recommendations 1 (specifically, alignment with *Climate 2050*) and 4 of the Climate Change and Natural Hazards Policy Review.
3.3.6	Accept Regional Context Statements that encourage land use, infrastructure, and settlement patterns that reduce energy consumption and greenhouse gas emissions, improve air quality, create carbon storage opportunities, and that meet or work towards Action 3.3.7.	Text updated to align with the proposed changes to the wording of Strategy 3.3.
	Member jurisdictions will:	
3.3.7	Adopt Regional Context Statements that: a) identify how local land use and transportation policies will contribute to meeting the regional greenhouse gas reduction target of 45 percent below 2010 levels by the year 2030 and achieving a carbon neutral region by the year 2050;	Text amended based on alignment with Climate 2050, as well as Recommendation 2 Climate Change and Natural Hazards Policy Review.
	b) identify policies, actions and/or strategies that reduce energy consumption and greenhouse gas emissions, create carbon storage opportunities, and improve air quality from land use, infrastructure, and settlement patterns, such as:	Text amended based on recommendations from the Air Quality and Climate Change division, as well as Recommendations 1 (specifically, alignment with

	• existing building retrofits and construction of new buildings to green performance guidelines or standards (e.g. *BC Energy Step Code*), the electrification of building heating systems, green demolition requirements, embodied emissions policies, zero carbon district energy systems, and energy recovery and renewable energy generation technologies, such as solar panels and geoexchange systems, and zero emission vehicle charging infrastructure; • community design and infrastructure that encourages transit, cycling, rolling and walking (e.g. direct and safe active transportation linkages to the transit system);	*Climate 2050*) and 4 from the Climate Change and Natural Hazards Policy Review. The use of the word "actions" (replacing "programs") is consistent with Local Government Act section 429-2d.
	c) focus infrastructure and amenity investments in Urban Centres and Frequent Transit Development Areas, and at appropriate locations along Major Transit Growth Corridors;	Text amended to align with updated policy language in Goal 1 of *Metro 2050*.
		The core elements of *Metro 2040* policy 3.3.4 d) have been moved to Strategy 3.2 given the redundancy with *Metro 2040* policy 3.2.7.
		Metro 2040 policy 3.3.5 re-framed as a Metro Vancouver-led action (new policy 3.3.4).
	TransLink will:	
3.3.8	Support regional air quality objectives and greenhouse gas emission reduction targets by minimizing sources from on-road transportation, and managing transit fleet and operations.	*Metro 2040* policy 3.3.6 and 3.3.7 amalgamated as new policy 3.3.8 to minimize redundancy.
		Metro 2040 policy 3.3.6 and 3.3.7 amalgamated as new policy 3.3.8 to minimize redundancy.
		Metro 2040 policy 3.3.8 re-framed as a Metro Vancouver-led advocacy action (new policy 3.3.5).
		Metro 2040 Figure 3 content will be re-purposed and added to the front matter of the plan, given the reference to all goal areas.

Goal: 3

Strategy 3.4

#	Proposed Metro 2050 Text	Rationale for Change
3	Protect the Environment and Respond to Climate Change and Natural Hazards	Removed the word "impacts" – which is associated solely with climate change adaptation - since responding to climate change encompasses both climate change adaptation (Strategy 3.4) *and* reducing GHGs (Strategy 3.3). Added reference to natural hazards based on the title of Strategy 3.4.
3.4	**Encourage land use, infrastructure, and settlement patterns that improve the ability to withstand climate change impacts and minimize natural hazard risks**	The addition of "settlement patterns" better reflects the full influence of land use and growth management on climate change adaptation/natural hazard resilience. Settlement patterns are also referred to in relation to hazard and risk explicitly in the Local Government Act, section 4.2.8k. The proposed edits also minimize confusion associated with the phrase "land use and transportation infrastructure". Reference to *transportation* infrastructure removed given that other forms of infrastructure are also referenced in this strategy.
n/a	**Strategy Rationale:** Climate change is expected to impact the Metro Vancouver region through warmer temperatures, decreased snowpack, sea level rise, longer summer drought periods, and increased precipitation in the fall, winter, and spring. The region is also exposed to multiple natural hazards, many of which are worsened by climate change. Where and how the region accommodates growth determines the degree to which communities and infrastructure are exposed to these risks. While efforts need to be made to ensure that all populations are well-equipped to address these challenges, proactive and collaborative planning can minimize risks by encouraging growth and development in more resilient areas, where feasible, and taking measures to ensure existing communities and infrastructure are resilient to current and future risks.	Adding a new "strategy rationale" section after each strategy will help explain the intention the subsequent policies seek to achieve.

	Metro Vancouver will:	
3.4.1	Incorporate climate change and natural hazard risk assessments into the planning and location of Metro Vancouver utilities, assets and operations.	No change.
3.4.2	Work with the Integrated Partnership for Regional Emergency Management, the Federal Government and the Province and their agencies, First Nations, TransLink and member jurisdictions, as appropriate, to: a) share information and data related to hazards, risks, and vulnerabilities in the Metro Vancouver region, develop a regional multi-hazard map, and coordinate priority actions to address the vulnerabilities identified, including implementation and funding strategies;	*Metro 2040* Policy 3.4.6 a) and b) re-purposed as a Metro Vancouver-led action, in alignment with Recommendation 5 from the Climate Change and Natural Hazards Policy Review. The words "as appropriate" included based on recommendations from Liquid Waste Services and Water Services departments.
	b) consider climate change impacts and natural hazard risks when extending utilities and transportation infrastructure that support development;	Specific hazards and climate change impacts deleted due to the variation in hazards faced across the region, and given the proposed Table added on Page 4.
	c) support the integration of emergency management, utility planning, and climate change adaptation principles in land use plans, transportation plans, and growth management policies;	New policy added in alignment with Recommendation 6 of the Climate Change and Natural Hazards Policy Review.
	d) research and promote best practices and develop guidelines to support resilience to the impacts of climate change and natural hazards as it relates to planning and development;	Policy amended to include the words "natural hazards" based on recommendation from IPREM during summer 2020 engagement.
	e) support regional flood management and the implementation of the Lower Mainland Flood Management Strategy; and	New policy added in alignment with Recommendation 7 of the Climate Change and Natural Hazards Policy Review.
	f) research and share information related to the impacts of climate change and natural hazards on vulnerable populations, and focus resilience actions on equitable outcomes.	New policy added to consider equity as it relates to climate change adaptation and natural hazard resilience.
3.4.3	Advocate to the Federal Government and the Province and their agencies that they: a) review and improve existing provincial legislation and guidelines regarding flood hazard management at the local level and mandate the adoption of flood hazard bylaws;	*Metro 2040* policy 3.4.7 d) amended and re-purposed as a Metro-Vancouver led advocacy action, and developed in alignment with Recommendation 5 of the Climate Change and Natural Hazards Policy Review.
	b) incorporate resilience considerations into building codes and standards;	New policy added in alignment with Recommendation 5 of the Climate Change and Natural Hazards Policy Review.
	c) modernize the *Emergency Program Act* with requirements for land use planning, and to consider land use implications in the development of climate change adaptation strategies; and	New policy added in alignment with Recommendations 5 and 6 of the Climate Change and Natural Hazards Policy Review.

	d) provide guidelines, programs, funding, and timely data and information to support regional and local planning for climate change impacts and natural hazards.	*Metro 2040* policy 3.4.7 a) amended and re-purposed as a Metro-Vancouver led advocacy action, and developed in alignment with Recommendation 5 of the Climate Change and Natural Hazards Policy Review.
3.4.4	Accept Regional Context Statements that encourage land use, settlement patterns, transportation and utility infrastructure which improve the ability to withstand climate change impacts and minimize natural hazard risks, and that meet or work towards Actions 3.4.5, 3.4.6, 3.4.7, and 3.4.8.	Minor change to align with the proposed title for Strategy 3.4.
	Member jurisdictions will:	
3.4.5	Adopt Regional Context Statements that include policies that: a) minimize risks associated with climate change and natural hazards in existing communities through tools such as heat response plans, seismic retrofit policies, and flood-proofing policies; and b) discourage new development in current and future hazardous areas to the extent possible through tools such as land use plans, hazard-specific Development Permit Areas, and managed retreat policies, and where development in hazardous areas is unavoidable, mitigate risks.	Reference to specific hazards removed given the proposed table on Page 4. Additional edits to 3.4.5 a) and b) align with Recommendation 5 from the Climate Change and Natural Hazards Policy Review.
3.4.6	Incorporate climate change and natural hazard risk assessments into planning and location decisions for new municipal utilities, assets, operations, and community services.	Reference to community services suggested by IPREM during summer 2020 engagement, given the connection to vulnerable populations.
3.4.7	Integrate emergency management, utility planning, and climate change adaptation principles when preparing land use plans, transportation plans, and growth management policies.	New policy added in alignment with Recommendation 6 from the Climate Change and Natural Hazards Policy Review. Supports regional resiliency.
3.4.8	Adopt appropriate planning standards, guidelines, and best practices related to climate change and natural hazards, such as flood hazard management guidelines and wildland urban interface fire risk reduction principles.	New policy added to align local action with the updated Provincial roles identified in 3.4.3 a) and d), as well as the new Metro Vancouver action in 3.4.2 d). Supports regional resiliency.
		Metro 2040 policy 3.4.6 re-purposed as a Metro Vancouver-led action (new policy 3.4.2 a), in alignment with Recommendation 5 from the Climate Change and Natural Hazards Policy Review.
		Metro 2040 policy 3.4.7 a) re-purposed as part of new policy 3.4.2. a) and 3.4.3 d), in alignment with Recommendation 5 of the Climate Change and Natural Hazards Policy Review.

<table>
<tr><td></td><td></td><td>*Metro 2040* policy 3.4.7 b) re-purposed as new policy 3.4.2 a) and 3.4.3 d), and the spirit of this policy is also captured in new policy 3.4.2 e). These edits align with Recommendations 5 and 7 from the Climate Change and Natural Hazards Policy Review.</td></tr>
<tr><td></td><td></td><td>*Metro 2040* policy 3.4.7 c) deleted given the ambiguous language. The spirit of this policy is captured in new policies 3.4.2 e), 3.4.3 a), and 3.4.3 d).</td></tr>
<tr><td></td><td></td><td>*Metro 2040* policy 3.4.7 d) re-purposed as new Metro Vancouver-led advocacy action 3.4.3 a), and in alignment with Recommendation 5 of the Climate Change and Natural Hazards Policy Review.</td></tr>
<tr><td></td><td>Table X:
Major Climate Change Impacts and Natural Hazards Affecting the Metro Vancouver Region

<table><tr><th>Natural Hazards</th><th>Related Climate Change Impacts</th></tr><tr><td>Earthquakes</td><td></td></tr><tr><td>Landslides</td><td>More precipitation (fall, winter, and spring)</td></tr><tr><td>Floods</td><td>More precipitation (fall, winter, and spring)
Sea level rise
Decrease in snowpack</td></tr><tr><td>Wildfires</td><td>Longer drought periods (summer)
Warmer temperatures</td></tr><tr><td>Erosion</td><td>Sea level rise
More precipitation (fall, winter, and spring)</td></tr><tr><td>Subsidence</td><td>Sea level rise</td></tr></table></td><td>New Table to be added that lists applicable regional/major climate change impacts, natural hazards, and their interaction. This table can be referred to in other goal areas of *Metro 2050*, as applicable, which would align with Recommendation 1 of the Climate Change and Natural Hazards Policy Review.</td></tr>
</table>

Metro 2050 Goal 3 Key Terms

A **carbon neutral region** is a region that has achieved the deepest greenhouse gas emission reductions possible across all economic sectors, and removes or captures sufficient carbon dioxide to balance any remaining regional greenhouse gas emissions.

Carbon storage refers to the total amount of carbon stored in ecosystems such as forests, wetlands and intertidal areas, which often takes thousands of years to accumulate. A conservative estimate of the total carbon stored in the vegetation and soils of the region's ecosystems is 65 million tonnes[1].

Climate change impacts refer to the consequences of realized climate change risks on ecosystems, economies, infrastructure and communities.

Ecosystem services are the benefits people obtain from ecosystems (Figure 1). These services can be grouped into four main types:

- **Provisioning services** include material and energy outputs from ecosystems, including food, fresh water, and raw materials used for construction and energy like wood.
- **Regulating services** refer to the services provided by ecosystems in processing and assimilating pollution, stabilizing water flows and soil erosion, controlling local climates, and storing or sequestering carbon.
- **Cultural services** are the non-material benefits people obtain from ecosystems through spiritual enrichment, cognitive development, recreation, and aesthetic enjoyment.
- **Supporting services** underpin all other ecosystem services. Ecosystems provide habitats for all plants and animals while depending on a diversity of species to maintain their own functions.

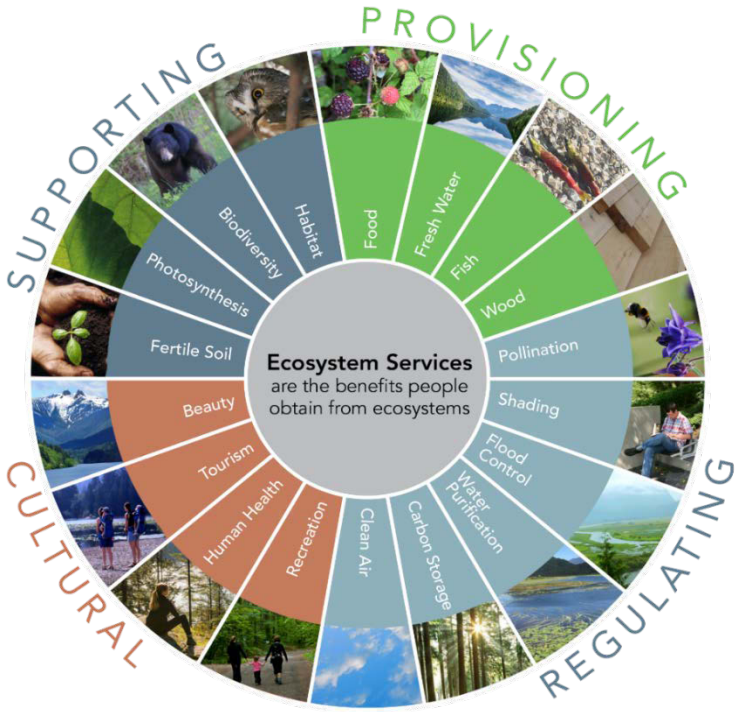


Figure1 Ecosystem services provided by healthy ecosystems

Embodied emissions are greenhouse gas emissions associated with the construction of goods and products, including the raw materials and the transport of the good or product to where it is sold.

[1] Estimate derived from Metro Vancouver's regional carbon storage dataset. The estimate applies to the full extents of the watersheds that supply the Metro Vancouver region's drinking water, along with estuarine and intertidal areas.

Green infrastructure (Figure 2) includes the natural, enhanced, and engineered assets that collectively provide society with ecosystem services. Natural assets (e.g. forests, wetlands, and soil) and enhanced or engineered systems (e.g. bioswales and green roofs) improve resilience and mitigate negative environmental impacts from urban development, benefiting both people and ecosystem integrity. A **green infrastructure network** exists when different types of green infrastructure components are connected in a system of core green spaces (called hubs) and corridors that link them together.

Figure 2 Types of Green Infrastructure

Natural hazards are naturally occurring phenomenon that may cause loss of life, injury or other health impacts, property damage, social and economic disruption or environmental degradation. Examples of natural hazards affecting the Metro Vancouver region include earthquakes, landslides, floods, and wildfires. Many natural hazards are worsened by climate change.

Resilience is the capacity of communities and organizations to prepare, avoid, absorb, recover and adapt to the effects of shocks and stresses in an efficient manner through the preservation, restoration, and adaptation of essential services and functions, while learning from shocks and stresses to build back better.

Risk is a combined function of the probability of a hazard occurring and the magnitude or severity of its potential consequences (injury, damage, loss of habitat etc.).

The **Sensitive Ecosystem Inventory** (SEI) is a consistent GIS-based inventory of the region's most ecologically important areas mapped using the provincial SEI science-based methodology by category, including quality. The SEI includes sensitive ecosystems and modified ecosystems, as follows:

- **Sensitive ecosystems** are ecologically fragile, rare or at-risk ecosystems such as wetlands, forests, and riparian areas.
- **Modified ecosystems**, such as young forests (30-80 years old) and freshwater reservoirs, that have experienced some human alteration, but still provide ecosystem services and remain important for biodiversity. In many cases, modified ecosystems are essential to maintaining ecosystem connectivity in highly fragmented landscapes where sensitive ecosystems have been lost.

The SEI does not include small, young, significantly disturbed, farmed or landscaped vegetation (e.g. young forests less than 5 hectares, crop or fallow land, enhanced or engineered green infrastructure, backyards, and street trees). Metro Vancouver creates the SEI for the region every six years using established provincial protocols. About Sensitive Ecosystems

Implementation Section (p57-64)		
Policy #	**Proposed Metro 2050 Text**	**Rationale for Change**
6.1 Regional Growth Strategy Implementation Framework		
6.1.1	Metro Vancouver and affected local governments will implement the regional growth strategy within a collaborative decision-making framework. This framework is based on provisions set out in the *Local Government Act* and in recognition by Metro Vancouver and affected local governments that collaborative decision-making is necessary in order to achieve the vision and goals laid out in the regional growth strategy.	Throughout - use terms to define the other authorities (Member Jurisdictions; Affected Local Governments) to be explained in glossary.
	The regional growth strategy has been designed so that the more regionally significant an issue, the higher the degree of regional federation involvement in decision-making, and conversely, the less regionally significant an issue, the less Metro Vancouver involvement there is. This approach is intended to provide appropriate consideration of land use planning decisions made within Metro Vancouver and member jurisdictions.	Minor wording changes
	This collaborative decision-making process applies to:	
	• acceptance by affected local governments of the initial regional growth strategy and subsequent amendments;	
	• acceptance by Metro Vancouver of municipal Regional Context Statements and subsequent amendments;	Minor wording changes
	• ongoing regional growth strategy and Regional Context Statement administration and procedures;	
	• implementation guidelines.	Add additional reference to implementation guidelines
6.2 Regional Context Statements		
6.2.1	Within two years of the Metro Vancouver Board's adoption of the regional growth strategy, each member jurisdiction must include in its Official Community Plan, and submit to the Metro Vancouver Board for acceptance, a Regional Context Statement. A member jurisdiction must submit its Regional Context Statement to the Metro Vancouver Board for acceptance after the member jurisdiction holds its public hearing relating to its Official Community Plan bylaw amendment.	Specifies when a member will submit its Regional Context Statement.

	Contents of Regional Context Statement	
6.2.2	The Regional Context Statement must identify the relationship between an Official Community Plan and the goals, strategies, and actions identified in the regional growth strategy. If applicable, the Regional Context Statement will identify how the Official Community Plan will be made consistent with the regional growth strategy over time. Regional Context Statements that propose to add or delete Frequent Transit Development Areas must be accompanied by written comments from TransLink.	
	Regional Context Statement Process	
6.2.3	If a member jurisdiction proposes an amendment to a Regional Context Statement it must submit to Metro Vancouver a council resolution, including an accompanying report, that sets out the member jurisdiction's proposed amendment(s).	Clarify notification process
6.2.4	If a member jurisdiction anticipates that its proposed Regional Context Statement, or amendment thereto, will not be accepted by the Metro Vancouver Board because it is not generally consistent with the regional growth strategy, the member jurisdiction should submit a proposed amendment to the regional growth strategy. The procedure for amendments to the regional growth strategy is set out in section 6.4.	Clarify process
6.2.5	The Metro Vancouver Board will respond within one-hundred-and-twenty (120) days of receiving a Regional Context Statement from a member jurisdiction by council resolution, indicating whether it accepts the Regional Context Statement. If the Metro Vancouver Board does not accept a Regional Context Statement, the Board will indicate the provisions to which it objects and the reasons for its objections.	Clarify notification process
Consistency with Regional Growth Strategy		
6.2.6	In considering acceptance of Regional Context Statements, the Metro Vancouver Board's expectation is that acceptable Regional Context Statements are generally consistent with the regional growth strategy's goals, strategies, actions and the regional land use designations depicted in the Regional Land Use Designations map (Map 2). Regional Context Statements should respond to all applicable policies in the regional growth strategy, and indicate how the Official Community Plan is generally consistent (including projections, maps, and specific policy language) or how it shall be made consistent over time.	Added additional statement about the expectations of RCSs.
Providing for Appropriate Municipal Flexibility		
6.2.7	A member jurisdiction may include language in its Regional Context Statement that permits amendments to the municipality's Official Community Plan to adjust the	

	boundaries of regional land use designations within the Urban Containment Boundary, as follows:	
a)	the member jurisdiction may re-designate land from one regional land use designation to another regional land use designation, only if the aggregate area of all proximate sites so re-designated does not exceed one (1) hectare;	
b)	notwithstanding section 6.2.7 (a), for sites that are greater than one (1) hectare and less than three (3) hectares in area, the member jurisdiction may re-designate land:	
	• from Industrial to General Urban regional land use designation, if the site is contiguous with an Industrial site and the developable portion of the site will be predominantly within 150 metres of an existing or approved rail rapid transit station; or	Edits for clarity, and match text in language in section 6.3.4 f). Delete 'Employment' lands from this list, as flexibility for Employment lands to allow residential uses in proximity to rail rapid transit stations is proposed under the Employment land use designation.
	• from Industrial to Employment regional land use designation if the developable portion of the site will be predominantly within 250 metres of an existing or approved rail rapid transit station, provided that:	
	• the re-designation does not impede rail, waterway, road or highway access for industrial uses; and	
	• the aggregate area of all proximate sites so re-designated does not exceed three (3) hectares;	
c)	the aggregate area of land affected by all re-designations under section 6.2.7 (a) and (b) together cannot exceed two (2) percent of the member jurisdiction's total lands within each applicable regional land use designation, the calculation of which starts on July 29, 2011.	To clearly state that the calculations started with the adoption of Metro 2040 in 2011, and will not restart in 2022.
6.2.8	A member jurisdiction may include language in its Regional Context Statement that permits amendments to its Official Community Plan to adjust the boundaries of Urban Centres and Frequent Transit Development Areas, provided such boundary adjustments meet the guidelines set out in Table 3 (Guidelines for Urban Centres and Frequent Transit Development Areas) of the regional growth strategy.	
6.2.9	Member jurisdictions will notify Metro Vancouver, in writing, of any and all adjustments, as permitted by sections 6.2.7 and 6.2.8, within thirty (30) days after the member jurisdiction has adopted its Official Community Plan amendment bylaw.	Clarify notification process. This will allow better tracking by Metro Vancouver and allow staff

		to maintain up to date maps.
6.2.10	If a member jurisdiction includes language in its Regional Context Statement that permits amendments to its Official Community Plan to adjust the boundaries of regional land use designations within the Urban Containment Boundary or the boundaries of Urban Centres and Frequent Transit Development Areas, as permitted by sections 6.2.7 and 6.2.8 respectively, the prescribed adjustments do not require a new Regional Context Statement or consideration by the Metro Vancouver Board. All other adjustments to regional land use designation boundaries require an amendment to the member jurisdiction's Regional Context Statement, which must be submitted to the Metro Vancouver Board for acceptance in accordance with the requirements of the *Local Government Act.*	Edits for greater clarity.
		Delete 6.2.11, as no longer applicable.
6.3 Categories of Regional Growth Strategy Amendments		
Type 1 – Amendments to the Regional Growth Strategy (acceptance by all affected local governments required)		
6.3.1	The following Type 1 amendments to the regional growth strategy require an affirmative 50%+1 weighted vote of the Metro Vancouver Board and acceptance by all affected local governments in accordance with section 436 of the *Local Government Act*	
a)	the addition or deletion of regional growth strategy goals or strategies;	
b)	an amendment to the process for making minor amendments to the regional growth strategy, which is specified in sections 6.3.3 and 6.3.4;	
c)	the matters specified in section 437 of the *Local Government Act.*	
6.3.2	All amendments to the regional growth strategy other than the amendments specified in section 6.3.1 are minor amendments (Type 2 and Type 3) for the purposes of section 437 of the *Local Government Act.*	Clarifies that a Type 1 amendment is not a minor amendment under the LGA, but Type 2 and 3 are.
Type 2 - Amendments to the Regional Growth Strategy (two-thirds weighted vote)		
6.3.3	The following Type 2 amendments require an affirmative two-thirds weighted vote of the Metro Vancouver Board:	Delete reference to regional public hearing requirement for Type 2 amendments
a)	amendment to the Urban Containment Boundary;	

b)	amendment of Agricultural or Conservation and Recreation land use designations, except as set out in section 6.3.4 (e), (f) and (g);	
c)	amendment from Rural land use designation to Industrial, Employment, or General Urban land use designations;	
d)	amendment of sites located outside the Urban Containment Boundary from Employment to a General Urban land use designation	
e)	the addition or deletion of an Urban Centre;	
f)	the addition or deletion of, or amendment to, the descriptions of the regional land use designations or actions listed under each strategy.	
Type 3 - Amendments to the Regional Growth Strategy (simple majority weighted vote)		
6.3.4	The following Type 3 amendments require an affirmative 50% + 1 weighted vote of the Metro Vancouver Board:	
a)	the addition or deletion of a Frequent Transit Development Area;	
b)	for sites within the Urban Containment Boundary, amendments from Industrial, Employment, or General Urban land use designations to any other such regional land use designations;	
c)	amendment from Industrial, Employment or General Urban land use designations to Rural, Agricultural, or Conservation and Recreation land use designations;	
d)	amendment from Rural land use designation to Agricultural or Conservation and Recreation land use designations;	
e)	amendment from Conservation and Recreation land use designation to Agricultural land use designation;	
f)	for sites that are contiguous with, or within, the Urban Containment Boundary, and are not within the Agricultural Land Reserve and subject to the *Agricultural Land Commission Act*, amendment from Agricultural or Rural land use designations to Industrial land use designation, and associated Urban Containment Boundary adjustments;	
g)	for sites that are identified as Special Study Areas on the Special Study Areas and Sewerage Extension Areas map (Map 12), an amendment to another regional land use designation and associated Urban Containment Boundary adjustments;	Refine for clarity
h)	removal of the Trade-Oriented overlay (Map XX) on lands with an Industrial regional land use designation; and	Indicates how the new Trade-Oriented Overlay

		could be removed.
i)	housekeeping amendments to figures, tables or maps in the Appendix Section, performance measures or other items related to document structure that do not alter the intent of the Regional Growth Strategy;	
j)	amendments to mapping to incorporate maps included in accepted Regional Context Statements;	
k)	the reclassification of a Frequent Transit Development Area to an Urban Centre, or reclassification of an Urban Centre type to another Urban Centre type;	As per the reclassification framework, the reclassification of an FTDA to an Urban Centre becomes a Type 3 amendment.
l)	all other amendments not identified in sections 6.3.1 or 6.3.3.	
6.4 Procedures for Regional Growth Strategy Amendments		
Who Can Apply for an Amendment		
6.4.1	The process to initiate amendments to the regional growth strategy is by resolution of the Metro Vancouver Board. Member jurisdictions may, by resolution, request amendments. The Metro Vancouver Board will not give first reading to an amendment bylaw which proposes to change a regional land use designation or Urban Containment Boundary unless or until the member jurisdiction or jurisdictions in which the subject site is located have requested that amendment or have been given the opportunity to formally comment on the proposed amendment.	
Notification and Request for Comments		
6.4.2	For all proposed amendments to the regional growth strategy the Metro Vancouver Board will:	
a)	provide written notice of the proposed amendment to all affected local governments;	
b)	provide a minimum of forty-five (45) days from the date of the notice for affected local governments, and the appropriate agencies, to respond to the proposed amendment;	Lengthen timeline from 30 to 45 days.
c)	post notification of the proposed amendment on the Metro Vancouver website, for a minimum of forty-five (45) days from the date of the notice;	Lengthen timeline from 30 to 45 days.
d)	if the proposed amendment is to change a site from Industrial or Employment to General Urban land use designation, provide written notice and a minimum of forty-five (45) days from the date of the notice for the Port	Lengthen timeline from 30 to 45 days.

	of Vancouver, the Vancouver International Airport Authority, the Ministry of Transportation and Infrastructure and/or the Agricultural Land Commission, as appropriate, to respond to the proposed amendment.	
6.4.3	For Type 1 amendments to the regional growth strategy set out in section 6.3.1, the procedures set out in section 435 of the *Local Government Act* apply.	
Procedures for Type 2 Amendments Requiring a Two-Thirds Weighted Vote		
6.4.4	For Type 2 amendments to the regional growth strategy set out in section 6.3.3, the Metro Vancouver Board will:	
a)	consider first, second and third reading of the amendment bylaw;	Updated process
b)	provided the amendment bylaw receives an affirmative two-thirds weighted vote of the Metro Vancouver Board at first second and third readings, refer for comment the proposed amendment to the regional growth strategy to all affected local governments, as per the requirements set out in section 6.4.2;	Add reference to third reading
		Delete reference to regional public hearing requirement for Type 2 amendments. And relocate reference to third reading.
c)	Provide public engagement opportunities that include: • notification on the Metro Vancouver website; • encouraging written comments via a comment form on the Metro Vancouver website; • appearing as a delegation to the Regional Planning Committee or Board when amendment is considered; • conveying comments submitted from the respective local public hearing to the MVRD Board, and • hosting a public information meeting (digitally or in person).	Replaces deleted public hearing with a variety of opportunities for public engagement.
d)	receive the comments from the comment period and consider final reading and adoption of the amendment bylaw, which must receive at least a two-thirds weighted vote of the Metro Vancouver Board.	Create as separate point
Procedures for Type 3 Amendments Requiring Simple Majority Weighted Vote		
6.4.5	For Type 3 amendments to the regional growth strategy set out in section 6.3.4, the Metro Vancouver Board will:	
a)	consider first, second, and third reading of the amendment	

	bylaw;	
b)	provided the amendment bylaw receives an affirmative majority weighted vote of the Metro Vancouver Board at each of the first, second, and third readings, refer for comment the proposed amendment to the regional growth strategy to all affected local governments, as per the requirements set out in section 6.4.2;	To stipulate referral process to affected local governments
c)	consider final adoption of the amendment bylaw and, provided the amendment bylaw receives an affirmative simple majority weighted vote of the Metro Vancouver Board, adopt the amendment bylaw.	Split into two sub-sections
6.5 Coordination with First Nations		
6.5.1	Metro Vancouver will work with First Nations to facilitate the compatibility of Metro Vancouver's regional growth strategy and First Nations planning and development initiatives.	
6.5.2	Many First Nations communities have asserted aboriginal rights and title to traditional territories within the region, and are currently engaged in treaty negotiations and other processes. The implementation of the regional growth strategy will proceed without prejudice to any aboriginal rights or title that may currently exist, or be defined further through treaty or other processes.	
6.5.3	A land use plan prepared by Tsawwassen First Nation will include a statement equivalent to a Regional Context Statement as defined in the *Local Government Act*, identifying how its land use plan is consistent with the regional growth strategy.	Shortened statement, as current RGS has been in force since 2011, which is after the 2009 TFN plan.
6.6 Coordination with TransLink		
6.6.1	Metro Vancouver will work with TransLink with the objective that the regional growth strategy and TransLink's regional transportation plans are compatible and complementary. Metro Vancouver will refer to TransLink for written comments on proposed Regional Context Statements that would impact the regional transportation system or significantly affect the demand for regional transportation services.	
6.6.2	As an affected local government, TransLink is required to consider acceptance of the regional growth strategy and any proposed Type 1 amendments, as set out in section 6.3.1.	
6.6.3	TransLink is mandated to provide a regional transportation system that is consistent and supportive of the regional growth strategy, and its associated goals, objectives, land use designations, overlays, and policies. The *South Coast British Columbia Transportation Authority Act* also requires TransLink to: review the regional growth strategy and any amendments to it and advise Metro Vancouver of the implications for the	Added new section further defining the roles and responsibilities of Translink, based on their Act.

	Regional Transportation Strategy, and prepare regional transportation investment plans that set out the relationships between major actions and the regional growth strategy.	
6.7 Coordination with Other Governments and Agencies		
6.7.1	Metro Vancouver will work with the Fraser Valley Regional District, the Squamish-Lillooet Regional District, and the Islands Trust (regarding Bowen, Bowyer, and Passage Islands) to facilitate the compatibility of regional planning and growth management initiatives in Metro Vancouver and these neighbouring jurisdictions.	
6.7.2	Metro Vancouver will collaborate with the Federal Government, the Province and their agencies on major investments in the regional transportation system, expansion of affordable housing options, and the location of public facilities that support the goals and strategies specified in the regional growth strategy. Metro Vancouver will seek formal Implementation Agreements with these agencies to give effect to that intent.	
6.8 Coordination with Metro Vancouver / Greater Vancouver Boards		
6.8.1	All bylaws adopted and all works and services undertaken by Metro Vancouver Regional District, the Greater Vancouver Water District, or the Greater Vancouver Sewerage and Drainage District must be consistent with the regional growth strategy. The Greater Vancouver Sewerage and Drainage District and the Greater Vancouver Water District will not directly or indirectly supply, agree to supply, or authorize connections that enable the supply of services to a site that is developed or proposed to be developed after the date of adoption of the regional growth strategy where the nature of that development is, in the sole judgment of the Metro Vancouver Regional District Board, inconsistent with the provisions of the regional growth strategy.	
6.8.2	For further clarity, sites within the Urban Containment Boundary that are designated General Urban, Industrial, or Employment, would be eligible for sewerage services, subject to normal Greater Vancouver Sewerage and Drainage District technical considerations, provided that the proposed development complies with the applicable policies under those designations and any such Urban Centre and Frequent Transit Development Area overlays that might apply.	
6.8.3	For lands with a Rural, Agricultural, or Conservation and Recreation regional land use designation, sections 1.1.1, 1.4.1, 2.3.1, and 3.1.1 apply regardless of whether the area is within one of the Greater Vancouver Sewerage and Drainage District's	Note: 1.1.1, 1.4.1, 2.3.1, and 3.1.1 refer to Metro 2040 policy actions.

	sewerage areas.	
	With reference to sections 1.1.1, 1.4.1, 2.3.1, and 3.1.1, in determining whether, in the circumstances, connection to regional sewerage services is the only reasonable means of preventing or alleviating a public health or environmental contamination risk, the Metro Vancouver Regional District Board will consider the opinion of a professional, as such term is defined in the Sewerage System Regulation pursuant to the *Public Health Act* (British Columbia), or if appropriate a qualified professional, as such term is defined in Municipal Wastewater Regulation 87/2012 pursuant to the *Environmental Management Act* (British Columbia), submitted by the member jurisdiction as to the technical and economic feasibility of installing and maintaining a private on-site sewage treatment system in accordance with all laws and regulations applicable in British Columbia. The Metro Vancouver Regional District Board may also obtain its own opinion from a professional and consider such opinion.	Note: 1.1.1, 1.4.1, 2.3.1, and 3.1.1 refer to Metro 2040 policy actions.
6.9 Sewerage Area Extensions		
6.9.1	Notwithstanding any other provision in the regional growth strategy, within the area identified on Map 12 as "Rural within the Sewerage Area", which includes part of the Salmon River Uplands in the Township of Langley that is contained within the Greater Vancouver Sewerage and Drainage District's Fraser Sewerage Area, and within the area identified on Map 12 as "Sewerage Extension Areas", regional sewer servicing will be permitted subject only to land uses being consistent with the applicable regional land use designation and normal Greater Vancouver Sewerage and Drainage District technical considerations.	Editing refinements, plus clarity of intent. Remove reference to North Salmon River Uplands and South Fernridge as these references are unnecessary.
6.9.2	All connections to regional sewerage services approved by the Greater Vancouver Sewerage and Drainage District Board as per sections 1.1.1, 1.3.1, 2.3.1, and 3.1.1 and 6.9.1 will be contained within a sewerage area footprint boundary as determined by the Metro Vancouver Regional District and Greater Vancouver Sewerage and Drainage District Boards. Any sewerage service connection outside of that boundary will require Metro Vancouver Regional District Board and Greater Vancouver Sewerage and Drainage District Board approval.	Editing refinements, plus clarity of intent. Note: 1.1.1, 1.4.1, 2.3.1, 6.9.1, and 3.1.1 refer to Metro 2040 policy actions.
		Reference to specific Implementation Guideline #7 removed – addressed in 6.15.1.

6.10 Special Study Areas		
6.10.1	Special Study Areas as depicted on the Special Study Areas and Sewerage Extension Areas map (Map 12) identify locations where, prior to the adoption of Regional Growth Strategy Bylaw No. 1136, on July 29, 2011, a member jurisdiction had expressed an intention to alter the existing land use, and is anticipating a future regional land use designation amendment. Pending Metro Vancouver Regional District Board approval of a regional land use designation amendment, the current regional land use designation(s) applies within the Special Study Area. Amending a regional land use designation within a Special Study Area is considered a Type 3 amendment under section 6.3.4 of the regional growth strategy. This includes any associated adjustment(s) to the Urban Containment Boundary for a Special Study Area. As part of any amendment establishing a new land use designation, the Special Study Area boundaries for those amended lands will be removed from the regional growth strategy.	Added sentence for clarity.
6.10.2	If the Special Study Area involves lands within the Agricultural Land Reserve, the member jurisdiction is required to consult with the Agricultural Land Commission during the preparation of the planning studies prior to initiating an application to exclude the lands from the Agricultural Land Reserve.	
6.11 Jurisdiction		
6.11.1	The regional growth strategy applies to all lands within the boundaries and jurisdiction of Metro Vancouver.	
6.11.2	In accordance with the *Agricultural Land Commission Act,* in the event that there is an inconsistency between the regional land use designations or policies set out in the regional growth strategy and the requirements of the *Agricultural Land Commission Act* or regulations and orders made pursuant thereto, the Agricultural Land Commission requirements will prevail.	
6.12 Regional Growth Strategy Maps		
6.12.1	The maps contained in the regional growth strategy are small scale depictions of the official regional land use designation maps and have been included for convenience purposes only. The official regional land use designation maps, the Sensitive Ecosystems Inventory map, and the Major Transit Growth Corridor map are maintained by Metro Vancouver and available for viewing on the Metro Vancouver website, and will be updated to incorporate changes to designation boundaries that result from adopted regional growth strategy amendment bylaws. TransLink owns and maintains the official Major Transit Network map on its website.	Reference to all the maps (SEI and MTGC map) is added. Added reference to TransLink's Major Transit Network map.

	The maps contained in the regional growth strategy are small scale depictions of the official regional land use designation maps and for convenience purposes only.	
6.12.2	Where a regional land use designation boundary does not align with a property or parcel legal boundary, the Agricultural Land Reserve boundary, a member jurisdiction Official Community Plan or zoning boundary, or a distinct geographic or natural feature, the regional land use designation boundary will be considered approximate, and the boundary depicted in the respective accepted Regional Context Statement shall prevail.	Editing refinements.
6.12.3	The boundaries of Urban Centres, Frequent Transit Development Areas, and Trade-Oriented Lands are to be defined by member jurisdictions in Official Community Plans, Neighbourhood or Area Plans, or equivalent, and shown in Regional Context Statements. Where member jurisdictions amend the boundaries of Urban Centres, Frequent Transit Development Areas, or Trade-Oriented Lands, and, in accordance with section 6.2.8, have not changed their Regional Context Statement, member jurisdictions will notify Metro Vancouver, in writing, within thirty (30) days.	Clarify notification process Added Trade-Oriented Lands to the list of Regional Overlays that member jurisdictions may define in Regional Context Statements.
6.12.4	The areas for Special Study Areas depicted on Map 12 are not to be expanded nor are new areas to be created. A Type 3 amendment to Map 12 is only permitted to delete Special Study Areas and may occur after the regional growth strategy has been amended to change the regional land use designation of the Special Study Area or when a member jurisdiction decides to eliminate a Special Study Area.	
		6.12.5 is deleted as there is no intent to create new / expanded Special Study Areas (as per 6.12.4).
6.13	**Tables, Figures and Performance Measures**	
6.13.1	Tables 2 showing dwelling unit and employment growth targets, and population projections for Metro Vancouver and member jurisdictions are included in the strategy as guidelines only. These tables are included in the regional growth strategy as a reference for use when preparing Regional Context Statements and regional planning initiatives. Metro Vancouver, in collaboration with member jurisdictions, will maintain projections to monitor growth and will propose updates to tables in accordance with the amendment process set out in section 6.3.4 following Metro Vancouver Board acceptance of Regional Context Statements or a significant change in the growth projections assumptions.	

6.13.2	The following figures and maps in the regional growth strategy are included as reference only: Tables 1, 4; Figures 1, 2, 3, 4; Maps 1, 9, 10, B.1, B.2.	
6.13.3	Pursuant to the *Local Government Act,* Metro Vancouver will prepare an annual report on progress in meeting the goals of the regional growth strategy through the monitoring of the performance measures identified in the Performance Measures section and in meeting other targets set out in the regional growth strategy.	
6.14 Interpretation		
6.14.1	In this document, unless the context requires otherwise, the term 'Metro Vancouver' refers to the Metro Vancouver Regional District.	
6.14.2	All terms used in the regional growth strategy that are defined in the *Local Government Act* have the meanings given to such terms in the *Local Government Act*.	
6.14.3	For terms not addressed in 6.14.2, a Glossary of Terms is provided and shall be used to define terms used in *Metro 2050*.	Added reference to new separate glossary section.
6.14.4	Affected local governments are the governments and authorities which are directly affected by the regional growth strategy, namely the Metro Vancouver member jurisdictions (excluding Bowen Island Municipality), the adjoining Regional Districts of Squamish-Lillooet Regional District and Fraser Valley Regional District, and the South Coast British Columbia Transportation Authority (also known as 'TransLink').	
		Previous Metro 2040 6.14.4 deleted.
6.14.5	In the case of the Electoral Area A, a Regional Context Statement is not required, but the policy actions listed for member jurisdictions should be addressed in the Electoral Area A Official Community Plan, as applicable.	New policy to clarify how "member jurisdiction" actions apply to planning in Electoral Area A.
6.15 Implementation Guidelines		
6.15.1	The Metro Vancouver Board may periodically prepare Implementation Guidelines to assist in the implementation of the regional growth strategy, to be prepared in collaboration with member jurisdictions. These guidelines should be read in conjunction with the regional growth strategy, and do not replace or supersede the content and requirements of the regional growth strategy.	References to specific guidelines have been deleted as this is unnecessary.

metrovancouver
SERVICES AND SOLUTIONS FOR A LIVABLE REGION

To: Regional Planning Committee

From: Sinisa Vukicevic, Program Manager, Regional Planning and Housing Services

Date: March 17, 2021 Meeting Date: April 9, 2021

Subject: ***Metro 2050* Projections Update**

RECOMMENDATION

That the MVRD Board receive for information the report dated March 17, 2021, titled "*Metro 2050* Projections Update".

EXECUTIVE SUMMARY

In collaboration with member jurisdictions, Metro Vancouver has revised the population, dwelling unit and employment growth projections for *Metro 2050*, the update to the regional growth strategy.

The proposed changes include:

- updated population, dwelling unit and employment projections to 2050 based on improved methodology and significant engagement with member jurisdictions and others;
- projections included at the regional and sub-regional scale, rather than by member jurisdiction (as is done currently), to better align with the work and infrastructure investments being undertaken by Metro Vancouver Utilities and TransLink and to mitigate for the static nature of the regional growth strategy and needed flexibility for member jurisdictions; and
- ensuring that member jurisdiction level projections continue to be provided as a Regional Planning service via annual reports and as a digital data product.

Metro Vancouver grew from 2.38 million people in 2011 to 2.59 million people in 2016. Regional Planning's modelling shows that this growth trend will continue. The region is anticipated to reach about 3.8 million people by 2050, which means an average annual growth of about 35,000 people. Metro Vancouver's projections are scenario based, with a range built in to address short terms shocks and uncertainties such as the one presented by COVID-19.

PURPOSE

To provide the Regional Planning Committee and MVRD Board with the opportunity to review and comment on the draft content of Metro Vancouver projections for *Metro 2050,* the updated regional growth strategy.

BACKGROUND

The *Metro 2040* Projections Policy Review set out to update the population, dwelling unit, and employment projections for Metro Vancouver's member jurisdictions and aggregate them for inclusion in *Metro 2050*. Metro Vancouver staff have been working through the projections update with member jurisdiction staff over a five-month engagement and review process, and they are now being provided to the Committee and Board for information.

PROJECTIONS IN METRO 2040

Metro 2040's population and housing projections were developed using a Cohort Projection Model, which provides a structure to establish a baseline population by municipality, gender and single year of age, and to combine annual changes in the population change components: natural increase (births, deaths) and migration (immigration, inter-provincial, Intra-provincial, inter-municipal). This demographic modelling provides the foundation for estimating household formation within the population and the associated housing demand. Regional employment projections were derived through comparative projections of the labour force and regional economic sector / employment trends. The projections developed by Metro Vancouver are scenario based, are provided as a reference for member jurisdictions and regional agencies, and do not represent specific targets for the region's or a municipality's growth. The projections in *Metro 2040* represent an approximate figure for a given year, with consideration for potential variance within a high and low growth margin. That is why municipalities are asked to demonstrate how they plan to be 'generally consistent' with the projections in their Regional Context Statements.

Continuous Improvement

Beyond *Metro 2040*, Metro Vancouver's mandate to implement and monitor growth in the region, requires estimates of how much growth the region may experience and how it might be distributed within the region. Metro Vancouver projects growth in population, housing and employment to support regional and municipal planning, transportation modelling and demand planning for regional water and wastewater services. Regional Planning continues to update those projections as trends change, data becomes available, and with a commitment to continuous improvement. Since the last update to the regional growth strategy, the Age-Cohort model has been improved and transferred to a dynamic modeling platform that supports the following important improvements:

- Incorporation of municipal land capacity through inclusion of municipal policy frameworks;
- Incorporation of municipal local demographic characteristics;
- Inclusion of UBC student housing population and households (may not be captured by the Census);
- First Nation's lands are now provided separate from municipalities to support their land use objectives;
- An estimate of jobs with no-fixed workplace and home-based jobs are involved in the framing of employment projections;
- Employment projections were cross-referenced with sub-regional employment projections based on assumptions and inputs from external experts; and
- Housing projections were cross-referenced with the housing demand estimate assumptions and feedback received from an Expert Panel and the RPAC - Housing sub-committee.

DRAFT *METRO 2050* REGIONAL AND SUB-REGIONAL PROJECTIONS

At its meeting on November 8, 2019 the Regional Planning Committee received the scope of work for updating *Metro 2040's* population, dwelling unit, and employment projections (Reference 1). Metro Vancouver's process in preparing the updated growth projections included establishing baselines or benchmark estimates and projecting future activities based on adopted municipal planning policies (e.g. OCPs, local area plans, and historical trends). The projections have been updated to the year 2050, and prepared using the Census 2016 data and updates from member jurisdictions on their respective land use plans. Based on a five-month-long consultation process with member jurisdiction

staff, Metro Vancouver staff reviewed and finalized the draft population, dwelling unit, and employment projections (Attachment).

The individual endorsed municipal projections have now been aggregated to the sub-regional and regional totals for inclusion in the regional growth strategy. During the consultation and review process, Metro Vancouver staff concluded that showing the projections in the regional growth strategy sub-regionally, instead of by individual jurisdiction, provides greater clarity that the projections are meant to be considered more broadly, and are meant to be used as a planning guide and are not targets. The projections are proposed to be presented sub-regionally for the following reasons:

- they will better support the long-term capital planning and investment programs of Metro Vancouver's utilities and TransLink, since the projections are more stable over the long term, and resilient to shocks / disruptors over the short and medium terms;
- they will be the main input to Metro Vancouver's Regional Land-use Model that is currently being developed; the model will use sub-regional projections as an input for the definition of land demand;
- they are a fundamental step in setting future growth targets for the Urban Centres and FTDAs within the sub-regions;
- they will provide more flexibility to member jurisdictions in preparing and adjusting with their own respective projections over time;
- they will be more resilient to rapid changes in residential and employment market demands that do not necessarily follow municipal boundaries; and
- they provide a better approximate alignment with utility and TransLink planning areas.

Further, while the sub-regional projections will form a part of *Metro 2050* and will be updated through the plan amendment process from time-to-time, staff also propose that projections at the sub-regional and member jurisdiction level will be updated annually and published as separate reports to be posted publicly on the Metro Vancouver website; detailed projection data will be made available by preferred geography to any member jurisdiction staff upon request and at any time. This approach will allow Metro Vancouver staff to keep the projections current and more accurate, and consider and better address situations like COVID-19 that result in immediate, short term impacts to the projections.

Metro Vancouver Sub-Regions

To varying degrees, sub-regions are currently being utilized in *Metro 2040*, where eight sub-regions have been defined in Table A.1 (Reference 2). In considering a more comprehensive methodology in the definition of Metro Vancouver's sub-regions for *Metro 2050*, staff are proposing six sub-regions for the purposes of communicating the projections, as follows:

- **North Shore** (City of North Vancouver, District of North Vancouver, District of West Vancouver, Electoral Area A, and Lions Bay + Bowen Island);
- **Burrard Peninsula** (City of Burnaby, City of New Westminster, City of Vancouver, UEL + UBC);
- **Tri-Cities** (City of Coquitlam, City of Port Coquitlam, City of Port Moody, Village of Anmore and Village of Belcarra);

- **South of Fraser- West** (City of Delta, City of Richmond, Tsawwassen First Nation);
- **South of Fraser – East** (City of Langley, City of Surrey, City of White Rock, Langley Township); and
- **North East** (City of Maple Ridge, City of Pitt Meadows).

Figure 1. Metro 2050 Projections - Sub Regions

NEXT STEPS

The updated sub-regional 2050 projections are intended to be introduced as a new, stand-alone section in *Metro 2050*. This section will be in the front of the regional growth strategy with supporting text and graphics similar to that shown in the Attachment.

In May 2021, staff will be presenting the new sub-regional projections to the *Metro 2050* Intergovernmental Advisory Committee, as a part of the complete draft of *Metro 2050*.

CONCLUSION

With the support of the *Metro 2050* Intergovernmental Advisory Committee, Metro Vancouver staff are currently drafting new and amended content for *Metro 2050* by goal area, based on the MVRD Board endorsed policy review recommendations.

Based on a five-month consultation and review process with member jurisdiction staff, Metro Vancouver staff have prepared updated draft population, dwelling unit, and employment projections.

During the consultation and after extensive consideration, Metro Vancouver staff concluded that showing the projections sub-regionally, instead of by individual jurisdiction, provides greater clarity that the projections are meant to be considered more broadly, rather than at the local level, and meant to be used as a guide and not precise targets. The projection data at the sub-regional and member jurisdiction level will be updated annually and published as separate reports to be posted publicly on the Metro Vancouver website; detailed projection data will be made available by preferred geography to any member jurisdiction staff upon request and at any time.

Attachment *(44710420)*
Draft Regional and Sub-Regional Population, Dwelling Unit and Employment projections to the year 2050

References
1. http://www.metrovancouver.org/boards/RegionalPlanning/RPL_2019-Nov-8_AGE.pdf#page=132
2. *Metro 2040* Table A.1

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DRAFT REGIONAL PROJECTIONS FOR POPULATION, DWELLING UNITS AND EMPLOYMENT

The draft projections for *Metro 2050* are scenario based representing a baseline with an intended range of +/- 15% for a high or low growth margin. They are projections derived from a dynamic modelling platform that supports the integration of municipal land capacity and demographic characteristics. These draft projections were developed through an 8 month engagement process with all member jurisdictions and triangulated with other agency methodologies and expert panel advice.

	POPULATION					
		2016	2020	2030	2040	2050
	Metro Vancouver Total	**2,593,200**	**2,767,000**	**3,206,100**	**3,564,100**	**3,836,800**
SUB-REGIONS	Burrard Peninsula	1,014,800	1,064,900	1,206,000	1,311,900	1,387,800
	North Shore	199,700	207,700	236,500	254,200	271,200
	South of Fraser – East	713,300	782,500	939,200	1,077,300	1,185,100
	South of Fraser – West	314,500	337,900	381,100	414,100	441,300
	North East	105,500	110,800	127,200	142,800	155,000
	Tri-Cities	245,300	263,100	316,100	363,800	396,500
	DWELLING UNITS					
		2016	2020	2030	2040	2050
	Metro Vancouver Total	**1,000,500**	**1,075,500**	**1,287,700**	**1,460,500**	**1,589,400**
SUB-REGIONS	Burrard Peninsula	435,900	462,900	533,200	584,600	623,400
	North Shore	79,600	83,600	100,600	111,900	122,000
	South of Fraser – East	242,700	266,900	332,300	395,200	441,000
	South of Fraser – West	113,500	123,100	146,700	163,400	175,400
	North East	38,800	42,200	50,000	56,800	61,900
	Tri-Cities	90,000	96,800	124,800	148,600	165,700
	EMPLOYMENT					
		2016	2020	2030	2040	2050
	Metro Vancouver Total	**1,342,200**	**1,420,100**	**1,621,600**	**1,775,300**	**1,883,600**
SUB-REGIONS	Burrard Peninsula	643,700	671,700	739,500	786,500	820,000
	North Shore	89,400	94,000	107,200	115,900	123,200
	South of Fraser – East	287,100	309,500	372,900	426,600	465,200
	South of Fraser – West	194,100	207,500	236,000	257,700	271,900
	North East	35,800	38,600	45,500	51,200	55,100
	Tri-Cities	92,000	98,900	120,500	137,500	148,200

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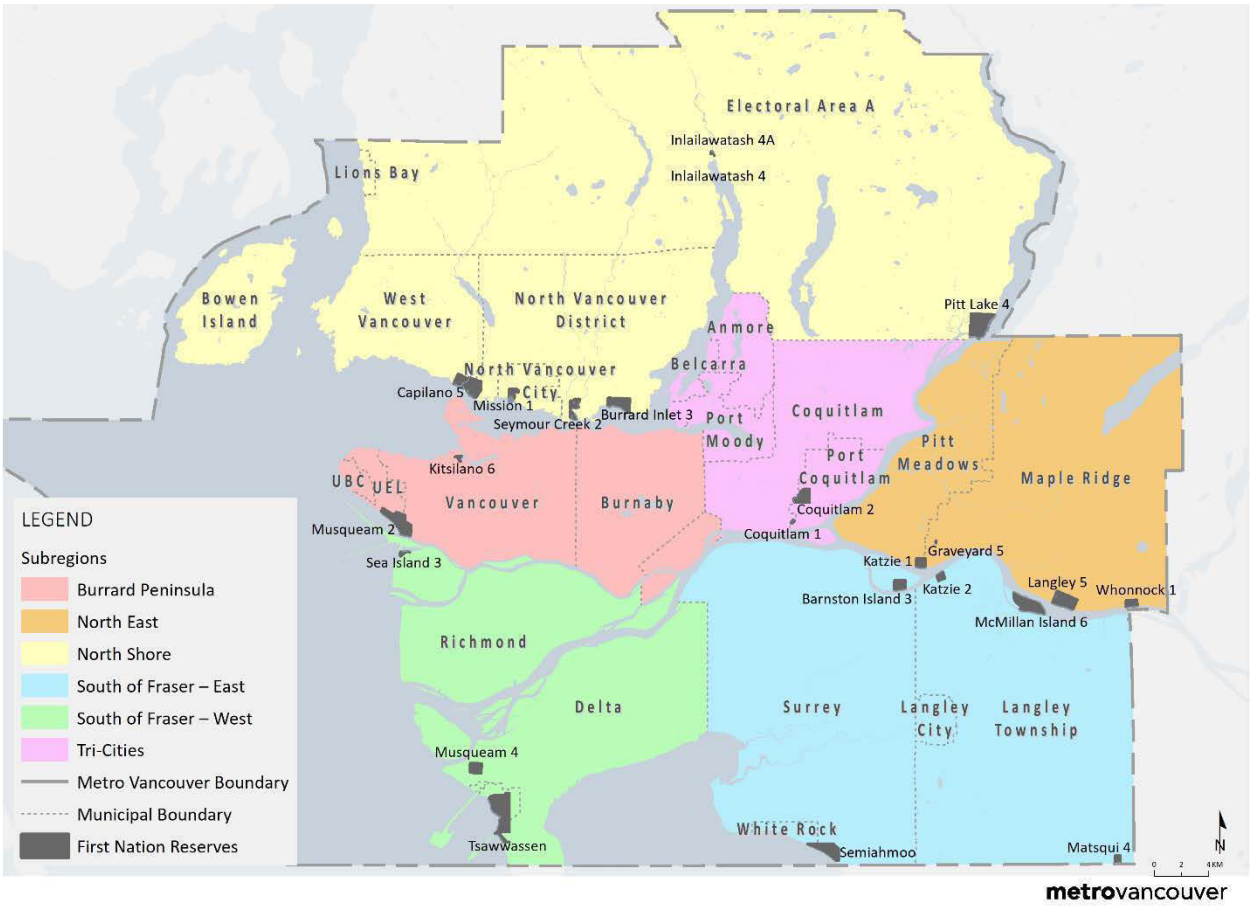
Metro Vancouver Projections Sub-Regions Map



To: Regional Planning Committee

From: Eric Aderneck, Senior Planner, Regional Planning and Housing Services

Date: March 25, 2021 Meeting Date: April 9, 2021

Subject: **Metro Vancouver 2020 Regional Industrial Lands Inventory**

RECOMMENDATION

That the MVRD Board:

a) receive for information the report dated March 25, 2021, titled "Metro Vancouver 2020 Regional Industrial Lands Inventory"; and

b) direct staff to distribute the report titled "Metro Vancouver 2020 Regional Industrial Lands Inventory", to member jurisdictions, the Province, the Port of Vancouver, TransLink, the Urban Development Institute, NAIOP, Vancouver Airport Authority, Agricultural Land Commission, and Squamish Lillooet and Fraser Valley Regional Districts to support ongoing efforts to protect the region's essential industrial land base for industrial activities.

EXECUTIVE SUMMARY

Metro Vancouver prepares a Regional Industrial Lands Inventory every five years, which supports the implementation of the regional growth strategy and the Regional Industrial Lands Strategy, as well as local planning and economic development efforts. The *2020 Regional Industrial Lands Inventory* provides a comprehensive and current summary of the quantity and quality of industrial lands in the region as of mid-2020. The data quantifies the limited supply of industrial lands, the amount of land that is developed for industrial and other uses by type of activity and lands that are vacant, supports industrial lands protection and intensification efforts, and provides comprehensive data for further analysis of industrial land matters.

The key findings from the 2020 Regional Industrial Lands Inventory include:

- there continues to be an increasing amount of industrial lands being used for non-industrial purposes, which poses a considerable threat to the industrial land base;
- there are few remaining available large sites for 'trade-oriented' logistics uses, which has impacts on businesses locating in the region and being able to stay and grow in the region;
- although there was an increase in the total size of the Inventory between 2015 and 2020, many of the lands added are not in locations well served by the transportation / goods movement network and even with these additions, due to the rate of development activity, the amount of vacant industrial land continues to decline; and
- there are continuing competing priorities for the limited industrial lands.

PURPOSE

To provide the *2020 Regional Industrial Lands Inventory* to the Regional Planning Committee and MVRD Board for information (Attachment).

BACKGROUND

A key deliverable for Regional Planning is a set of regional land use inventories to support planning and policy making in the region. Metro Vancouver has completed a Regional Industrial Land Inventory every 5 years since 2005. The *2020 Regional Industrial Lands Inventory* is now ready for Committee and Board review.

THE IMPORTANCE OF INDUSTRIAL LANDS

Industrial lands are required to support a prosperous and growing regional economy and workforce, as well as local, regional and national transportation and trade functions. Given the ongoing pressures to convert industrial lands to other uses and the limited industrial land base, protecting the industrial land supply is imperative to accommodate the region's growing economy and employment. The efficient use of industrial lands in the Metro Vancouver region is important for both local-servicing businesses and trade-related organizations. *Metro 2040* includes provisions for the protection and intensification of the region's industrial lands to support economic prosperity and an efficient goods movement network.

Approved in 2020, the *Metro Vancouver Regional Industrial Lands Strategy* identifies a series of recommendations to respond to the issues facing the region's industrial lands (Reference 2). A key component to inform public policy and private investment decisions is an accurate and current inventory of the industrial lands in the region.

The 2020 Inventory presents a comprehensive inventory of industrial and associated lands in the region and contains detailed information about the quantity, quality, status, and attributes of the lands as of mid-2020. The 2020 Inventory provides a complete picture of the amount and type of 'Developed' and 'Other / Vacant' lands in the region, and also allows for a comparison with past inventories (namely the revised 2015 Inventory) to assess change over time.

2020 REGIONAL INDUSTRIAL LANDS INVENTORY METHODOLOGY

Metro Vancouver developed the methodology for the 2020 Inventory through building on the experience from the 2015 Inventory and subsequent refinements (Reference 1). The principal objective for the Inventory is to systematically categorize industrial lands using a consistent and clear set of criteria. Inventory land use classifications are based on the existing use of the lands and are different and independent of the regional land use designations found in *Metro 2040*.

The 2020 Inventory includes 30 land use classifications that provide a detailed assessment of the wide range of different types of industrial, quasi-industrial functions, and non-industrial activities occurring on the lands. For reporting purposes, these detailed classifications have been consolidated into 7 larger groups, organized by 9 sub-regions. The land use classification definitions reference the primary use of the site, including normally associated on-site accessory / ancillary uses, such as parking or loading areas.

2020 REGIONAL INDUSTRIAL LANDS INVENTORY RESULTS

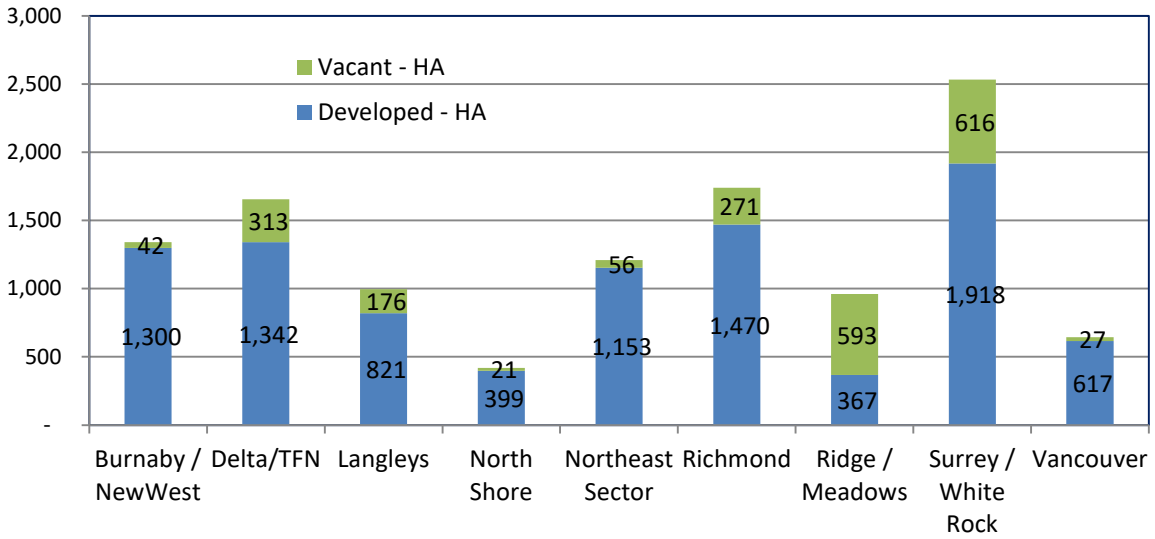
In mid-2020, the Metro Vancouver region had 11,502 hectares (28,422 acres) of lands within the Inventory study area; 82% (9,387 ha) of lands were 'Developed' and 18% (2,115 ha) were 'Other / Vacant'.

The key summary points from the 2020 Inventory include:

- despite industrial lands being set aside in municipal plans / policies for 'industrial use', the notion of 'developed' does not imply all are fully developed and used for 'industrial purposes'. 'Other / Vacant' includes lands that have non-industrial uses. These uses impact the industrial capacity of the lands;
- the quality of lands, including such attributes as size, location, and site features, are as important as the quantity of lands;
- most of the lands in the Inventory are located in the southern and eastern parts of the region: i.e. 22% in Surrey, 15% in Richmond, and 14% in Delta / Tsawwassen First Nation;
- 40% of lands were categorized as 'Building Intensive Industrial', with a range of industrial uses, along with associated accessory uses;
- 25% of the lands were used for 'Large Scale Infrastructure / Transportation' (utilities, port, airport, rail yards), which are not tracked by the market; and
- the Inventory includes lands designated and/or zoned industrial that have stand-alone non-industrial uses including as 'Retail' (4% of the inventory) and 'Commercial' (4%).

Figure 1 below shows the distribution of the 'Developed' and 'Other / Vacant' lands by sub-region geography. Many more tables and charts can be found in the technical report.

Figure 1: Developed and Other/Vacant Inventory by Sub-Region (Ha)



The documented changes in inventory size and absorption between 2015 and 2020 include:

- in terms of additions or removals from the Inventory, 323 ha (798 ac) of land were added while 70 ha (174 ac) were removed; this results in a net increase of 252 ha (624 ac) in the inventory over the five-year period;
- most of the Inventory additions occurred in: Maple Ridge, Delta, and Port Coquitlam;
- notable removals from the Inventory occurred in: Still Creek in Burnaby, Queensborough in New Westminster, Campbell Heights in Surrey, and Willoughby in Langley;

- in terms of absorption (vacant lands becoming developed, or vice versa), 507 ha (1,253 ac) went from 'Other / Vacant' to 'Developed' status, while 23 ha (58 ac) of lands went from 'Developed' to 'Other / Vacant' status. This yielded a net absorption of 484 ha (1,196 ac) of lands over the five-year period, for an annual average of 97 ha (239 ac);
- the amount of 'Other / Vacant' lands decreased by 531 ha (1,311 ac) during the 2015-2020 period: i.e. 507 ha (96%) became 'Developed' via absorption, while 23 ha (4%) were entirely removed from the Inventory (due to municipal designation changes or land use changes).

The findings further profiled in the 2020 Inventory report include:

- **Qualitative attributes of lands matter -** The Inventory comprises lands used and intended for industrial. The Inventory includes traditional and new types of industrial activities, quasi-industrial functions, and non-industrial uses on the lands, which have different user needs. The quality of lands, such as attributes like size, location, and site features, are as important as quantity of lands.
- **Lands added to and removed from the Inventory have different locational and site attributes -** Lands were removed from the Inventory due to a number of reasons, but mostly due to municipal policy changes. Much of the lands added to the Inventory were in locations not well served relative to transportation networks / goods movement corridors nor have other key attributes desired by the market, whereas some of the lands removed had good accessibility.
- **Few available large sites for 'trade-oriented' logistics uses -** There are few vacant sites available for 'trade-oriented' logistics users, namely large sites with minimal constraints and close to transportation infrastructure.
- **Increasing amounts of industrial lands are used for non-industrial purposes -** Conversion of industrial lands can occur in different ways. Some industrial lands are re-designated and removed from the Inventory as per municipal plans, while other lands with flexible industrial designations are rezoned to allow for non-industrial uses (e.g. office, commercial). Some of these other types of uses support industrial activities, while others may threaten industrial areas, such as commercial and retail uses beyond those accessory or supporting industrial uses.
- **Continued competing priorities for limited lands –** *Metro 2040* and the Regional Industrial Lands Strategy include industrial and other long range regional planning goals. Because of these multiple objectives, at both the regional and local levels, there are in some cases competing or even conflicting policy priorities.
- **Most, but not all, industrial lands are secured for long-term protection -** Municipal policies (land use designations and zoning) and regional land use designations secure the long-term industrial use of industrial lands. Lands that do not have such policy protection are more likely to convert and redevelop to other uses, particularly lands located in Urban Centres.
- **More industrial land intensification is expected over time -** Most of the developed lands are substantially used, with limited immediate opportunity for redevelopment and intensification. Nevertheless, as these lands redevelop, there will be potential to densify and intensify.

- **The industrial land absorption rate declined due to limited raw land supply -** Although recorded development / absorption activity is a reflection of industrial demand, it is in fact limited by the amount of land supply, so is not a true reflection of total demand.

The 2020 Inventory can be used to inform regional and municipal planning processes and policy work, as well as inform infrastructure investments by agencies and private sector business decisions, by such means as supporting:

- refinement of municipal and regional industrial plans and policies;
- refinement of municipal zoning bylaws;
- preparation of area plans and employment projections;
- preparation of tools to encourage the development and intensification of industrial lands;
- the development community with information about available industrial lands; and
- appropriate economic and employment growth.

NEXT STEPS

As part of the ongoing implementation of the Regional Industrial Lands Strategy and the release of the 2020 Regional Industrial Lands Inventory, Metro Vancouver will pursue opportunities to engage with stakeholders to advance industrial land matters across the region. This includes such things as promoting the results of the 2020 Inventory to member jurisdictions, industrial developers, and other agencies and stakeholders, to encourage more intensive industrial development forms, while encouraging the protection of the industrial use intent of the limited land supply.

Additional work based on the 2020 Inventory could address industrial land demand, documenting market readiness and redevelopment / intensification potential, a regional land use assessment (which is currently being scoped), and support other regional and local planning initiatives.

ALTERNATIVES

1. That the MVRD Board:
   a) receive for information the report dated March 25, 2021, titled “Metro Vancouver 2020 Regional Industrial Lands Inventory”; and
   b) direct staff to distribute the report titled “Metro Vancouver 2020 Regional Industrial Lands Inventory”, to member jurisdictions, the Province, the Port of Vancouver, TransLink, the Urban Development Institute, NAIOP, Vancouver Airport Authority, Agricultural Land Commission, and Squamish Lillooet and Fraser Valley Regional Districts to support ongoing efforts to protect the region’s essential industrial land base for industrial activities.

2. That the MVRD Board receive for information the report dated March 25, 2021, titled “Metro Vancouver 2020 Regional Industrial Lands Inventory” and provide alternative direction to staff.

FINANCIAL IMPLICATIONS

There were no financial implications. The work was completed as part of the 2019-2020 Board-Approved Regional Planning budget and work program.

CONCLUSION

Metro Vancouver completed the 2020 Regional Industrial Lands Inventory as an update of the 2015 Inventory to document the current supply and use of industrial and associated lands in the region. The 2020 Inventory provides a comprehensive summary of industrial lands and their characteristics, including quantity and quality, as well as documenting change over time (2015-2020). The results also assist in continuing to monitor and implement the strategies and recommendations of the regional growth strategy and Regional Industrial Lands Strategy. It also supports member jurisdictions and other agencies in their efforts to protect and promote the efficient use of industrial lands, and provide the development community with information about available lands and opportunities.

Metro Vancouver will continue to work with member jurisdictions and agencies to advance industrial land matters. Successfully achieving the vision of the Regional Industrials Lands Strategy will require the continued close collaboration and partnership with many stakeholders, and a long-term shared commitment by Metro Vancouver and its member jurisdictions.

Attachment *(44687318)*
Metro Vancouver 2020 Regional Industrial Lands Inventory Technical Report, March 2021

References

1. Metro Vancouver – Regional Industrial Lands Inventory reports (2005, 2010, 2015)
2. Metro Vancouver Regional Industrial Lands Strategy

44293263

Metro Vancouver 2020 Regional Industrial Lands Inventory: Technical Report

March 2021

Prepared by:
Metro Vancouver
Regional Planning

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Executive Summary

The Metro Vancouver 2020 Regional Industrial Lands Inventory ('Inventory') provides a comprehensive summary of the quantity and quality of industrial and associated lands in the Metro Vancouver region as of mid-2020. It provides information about the amount of land that is developed for industrial and other uses, and identifies lands that are vacant by type of activity and other attributes.

The objective for the 2020 Inventory is to systematically categorize industrial lands in the Metro Vancouver region using a consistent and clear set of rules. This work continues the ongoing monitoring of the region's industrial land base and supports implementation of the regional growth strategy and the Regional Industrial Lands Strategy, and associated objectives to protect and intensify industrial lands, and provide data for further analysis of industrial lands matters.

As context, Metro Vancouver is a high growth region and industrial lands are critical to trade and transportation functions that serve Canada and also serve as important locations for industry and other activities supporting a prosperous and growing regional economy. Industrial lands in the Metro Vancouver region comprise only 4% of the land base, but accommodate about 27% of the region's jobs and 30% of GDP. If accounting for direct, indirect, and induced impacts, the region's industrial lands support over 40% of the region's jobs, which have average wages that are over 10% higher than the regional average. Furthermore, business and employment activities on industrial lands contribute approximately $9 billion in tax revenues to various levels of governments.[1]

Building on past Inventories completed for 2005, 2010, and 2015, the 2020 Regional Industrial Lands Inventory quantifies the Metro Vancouver region's lands as follows, noting that the qualitative attributes (e.g. location, access, size) of the lands are as important in terms of functionality. (Note: Current land use classifications are different and independent of future-oriented land use designations.)

Inventory of Lands as of 2020

- In mid-2020 there were 11,502 hectares (28,422 acres) of lands within the Inventory study universe, as defined[2].
- 82% (9,387 ha) of lands were 'Developed' and 18% (2,115 ha) were 'Other / Vacant', as defined.
- Despite industrial lands being earmarked in municipal plans / policies for 'industrial use', the notion of 'Developed' does not imply all are (fully) developed and used for 'industrial purposes'. 'Other / Vacant' includes lands that have non-industrial uses. These uses impact the industrial capacity of the lands.
- Most of the lands in the Inventory are located in the southern and eastern parts of the region: 22% in Surrey, 15% in Richmond, and 14% in Delta / Tsawwassen First Nation.
- 40% of lands were classified as 'Building Intensive Industrial' use, with a range of industrial uses, along with associated accessory uses.

[1] Source: Metro Vancouver Industrial Lands: Economic Impact and Future Importance, InterVISTAS, 2019.
[2] The scope of lands included in the Inventory are all lands that are municipally designated (Official Community Plans, sub-area / neighbourhood plans, or equivalent) industrial, plus lands that are both zoned (or equivalent) industrial and used for industry, as of the date of the Inventory.

- 25% of the lands were used for 'Large Scale Infrastructure / Transportation' (utilities, port, airport, rail yards), which are not tracked by the market. The Inventory also included lands with non-industrial uses such as 'Retail' (4%) and 'Commercial' (4%).
- Of the 'Other / Vacant' lands in the Inventory, 3% were used for 'Resource Extraction', 2% for 'Residential', 1% for 'Agriculture', and 11% were undeveloped or fully vacant. These lands will serve as the future supply of industrial development.
- In terms of site sizes, 24% of 'Other / Vacant' lands were on sites larger than 20 ha (50 ac), which are often associated with trade-oriented uses, although some sites may not be well-located for trade-oriented uses. The available site size impacts the types of industrial users that can be accommodated.
- Long-term protection in the form of regional and/or municipal policy for industrial lands varies, with 89% of the Inventory regionally designated as either 'Industrial' (67%) or 'Mixed Employment' (22%). At the municipal level, 82% were both zoned industrial and designated industrial. Of the 'Developed' lands, most (85-95% depending on the land use) were protected with both municipal industrial designation and industrial zoning. Some 3% (390 ha) of the Inventory had municipal industrial zoning but not municipal industrial designation, thus are at greater risk for conversion into non-industrial use in the coming years.

Change in Inventory Universe Size Between 2015 and 2020

- In terms of inclusion (additions) or exclusion (removals) from the Inventory universe (which is separate from 'vacant' or 'developed' land use status) between 2015 (revised)[3] and 2020: 323 ha (798 ac) of land were added, and 70 ha (174 ac) were removed. These two sets of changes resulted in a net increase of 252 ha (624 ac) of land over the five-year period.
- Most of the Inventory additions occurred in: Maple Ridge, Delta, and Port Coquitlam. Notable removals from the Inventory occurred in: Still Creek in Burnaby, Queensborough in New Westminster, Campbell Heights in Surrey, and Willoughby in Langley.

Industrial Lands Absorption Between 2015 and 2020

- In terms of absorption (vacant lands becoming developed, or vice versa) over the 2015 to 2020 period, 507 ha (1,253 ac) went from 'Other / Vacant' to 'Developed' status, while 23 ha (58 ac) of lands went from 'Developed' to 'Other / Vacant' status. This yielded a net absorption of 484 ha (1,196 ac) of lands over the five-year period, for an annual average of 97 ha (239 ac).
- The amount of 'Other / Vacant' lands decreased by 531 ha (1,311 ac) during the 2015-2020 period: 507 ha (96%) became 'Developed' via absorption, while 23 ha (4%) were entirely removed from the Inventory (due to municipal designation changes or land use changes).

Key Findings Profiled in the Report

Inventory methodology limitations are important considerations - The land use classification definitions reference the predominant or primary use of the site, including normally associated on-site accessory / ancillary uses. The classification process cannot be perfectly accurate, given the variety of different data sources and currency.

Qualitative attributes of lands matter - The Inventory comprises lands used and intended for industrial. The Inventory includes traditional and new types of industrial activities, quasi-industrial

[3] The revised 2015 Inventory numbers referred to in this report reflect adjustments to noted inconsistencies, and are thus more comparable with the 2020 Inventory results.

functions, and non-industrial uses on the lands, which have different user needs. The quality of lands, such as attributes like size, location, and site features, are as important as quantity of lands.

Increasing amounts of industrial lands are used for non-industrial purposes - Conversion of industrial lands can occur in different ways. Some industrial lands are re-designated and removed from the Inventory as per municipal plans, while other lands with flexible industrial designations are rezoned to allow for non-industrial uses. Some of these other types of uses support industrial activities, while others may threaten industrial areas, such as commercial and retail beyond those accessory or supporting industrial uses.

Continued competing priorities for limited lands - The Metro Vancouver regional growth strategy and Regional Industrial Lands Strategy include industrial and other long range regional planning goals. Because of these multiple objectives, at both the regional and local levels, there are in some cases competing or even conflicting policy priorities.

Most but not all industrial lands are secured for long-term protection - Municipal policies (land use designations and zoning) and regional land use designations secure the long-term industrial use of industrial lands. Lands that do not have such policy protection are more likely to convert and redevelop to other uses, particularly lands located in Urban Centres.

Lands added to and removed from the Inventory have different locational and site attributes - During the 2015-2020 period, 323 ha of land were added to the Inventory, mostly in Surrey, Langley, and Maple Ridge, and 70 ha were removed from throughout the region. Lands were removed from the Inventory due to a number of reasons, but mostly due to municipal policy changes. Much of the lands added to the Inventory were in locations not well served relative to the region's major transportation infrastructure networks / goods movement corridors nor have other key attributes desired by the market, whereas some of the lands removed had good accessibility.

Few available large sites for 'trade-oriented' logistics uses - There are few vacant sites available for 'trade-oriented' logistics users, namely large sites with minimal constraints and close to major transportation infrastructure.

More industrial land intensification is expected over time - Most of the developed lands are substantially used, with limited immediate opportunity for redevelopment and intensification. Nevertheless, as these lands redevelop, there will be potential to densify and intensify.

The industrial land absorption rate declined due to limited raw land supply - The net land absorption (lands changing from 'Other / Vacant' to 'Developed' status) was 484 ha over the 2015-2020 period, or 97 ha per year on average. Although recorded development / absorption activity is a reflection of industrial demand, it is in fact limited by the amount of land supply, so it is not a true reflection of total demand.

Difficult to estimate lifespan of available vacant lands - The amount of development will be impacted not just by demand but also increasingly by the limited supply of available vacant industrial lands that can be brought to market, as well as redevelopment and intensification activity. Using a theoretical absorption forecast model, the 'Other / Vacant' industrial land supply might be substantially absorbed in the 2030s.

Further Study Topics - The Regional Industrial Lands Inventory can be considered and analyzed through different 'lenses' or 'filters' from different perspectives. Accordingly, building on the Inventory results, further study is possible, such as: industrial intensification, market readiness, regional land use assessment, industrial typologies, and other topics related to industrial lands, employment, economy, and transportation.

1 Introduction

1.1 Overview and Intended Outcome

The Metro Vancouver 2020 Regional Industrial Lands Inventory ('Inventory') provides a comprehensive picture of the amount and type of industrial and associated lands in the region. The Inventory contains detailed information about the quantity, use, status, and attributes of the lands in Metro Vancouver as of mid-2020. The 2020 Inventory, with 30 detailed land use classifications, also allows for a comparison with the past Inventory (namely 2015, as revised) to track change over time, land development / absorption patterns, and inform possible further work.

1.2 Objectives

The purpose of the Inventory is to report the status of the quantity and quality of industrial lands in the region with an aim to improve the understanding of the different types of lands and uses, and inform decision-makers and further studies and policy work. The Inventory provides accurate and nuanced information about the amount of land that is used for industrial and other associated lands, and types of activities on the lands, as well as other attributes.

The objectives of the Inventory and this report are to:

- provide information about the region's supply of industrial lands as of mid-2020;
- illustrate changes between the 2015 (revised) and 2020 Inventories;
- inform dialogue and policies about industrial lands issues in the region;
- support further actions to advance industrial lands protection and intensification; and
- inform regional planning performance measuring and reporting.

1.3 Application

The Inventory provides detailed information about the region's industrial land supply, and allows for focused analysis on particular areas of interest (geographic, industrial sectors, type of land uses, etc.). The 2020 (and 2015 revised) Inventory methodology includes a range of land use classifications to portray the region's functional industrial land supply.

As further explained in Appendix 10, the revised 2015 Inventory numbers referred to in this report reflect adjustments to noted inconsistencies, and are thus more comparable with the 2020 Inventory results. These 2015 numbers replace the previously published numbers in the 2015 Inventory report.

The Inventory documents the type of use occurring on lands, and informs the potential to accommodate additional industrial activities. Industrial land uses can be compared between different areas of the region to assess differences and similarities, as well as areas with potential under-utilized lands or areas at risk of conversion. It can inform regional and municipal planning processes and work, as well as infrastructure investments by agencies and private sector decisions, such as supporting:

- refinement of municipal and regional industrial plans and policies;
- refinement of municipal zoning bylaws;

- preparation of area plans and employment projections;
- preparation of tools to encourage the development and intensification of industrial lands;
- the development community with information about available industrial lands; and
- appropriate economic and employment growth.

The Inventory sets the stage for -- as separate studies -- the assessment of lands based on their potential industrial development in terms of redevelopment or intensification / densification, reflecting features and criteria such as area opportunities / constraints, proximity to transportation infrastructure, and other key factors. This analysis can estimate the amount of vacant industrial lands in the region that could likely be developed over time and also which types of industrial activities could be accommodated on them. (Note: Current land use classifications are different and independent of future-oriented land use designations.)

Identifying specific lands that have the greatest potential for industrial (re)development and intensification will also inform other planning initiatives, including municipal and sub-area / neighbourhood plans, policies to advance industrial land redevelopment in specific areas, and exploration of appropriate regulations and incentives to encourage industrial investment.

Further work on the industrial lands portfolio may relate to industrial land demand, documenting the land needs of industrial users by sector or typology, considering alternative means to accommodate anticipated industrial growth in the region, efficient goods movement options, market readiness of lands, and intensification / densification potential.

1.4 Policy Context

Metro Vancouver 2040: Shaping Our Future ('Metro 2040'), the regional growth strategy, adopted in 2011 (and being reviewed and updated in 2020-2022), includes regional land use designations and policies to protect industrial lands, encourage industrial intensification, and coordinate efficient goods movement infrastructure to serve industry.

Metro 2040 provides a policy response to a number of challenges, including both the need to ensure an adequate supply of space for industry and commerce as well as the importance of protecting the natural and agricultural land base in the region. The Inventory supports the goals of *Metro 2040*, specifically providing information to protect the supply of industrial lands and encourage industrial intensification.

The *Metro 2040* regional land use designations identify regionally significant industrial lands. Industrial activities (along with some accessory uses) are mostly accommodated on lands designated 'Industrial' and 'Mixed Employment'. *Metro 2040* 'Industrial' lands, followed by 'Mixed Employment' lands, have the greatest level of importance for industry and thus level of policy protection. 'General Urban' designated lands, with various municipal designations and zoning, also accommodate industrial activities, but the level of policy protection is much less.

Metro 2040 has six regional land use designations. These designations are parcel-based and apply to the entire region. Two of these designations are for industrial related uses, described as follows:

- *Industrial areas are primarily intended for heavy and light industrial activities, and appropriate accessory uses. Limited commercial uses that support industrial activities are appropriate. Residential uses are not intended.*

- *Mixed Employment areas are intended for industrial, commercial and other employment related uses to help meet the needs of the regional economy. They are intended to continue to support industrial activities, and complement and support the planned function of Urban Centres and Frequent Transit Development Areas. Mixed Employment areas located within Urban Centres and Frequent Transit Development Areas provide locations for a range of employment activities and more intensive forms of commercial development.*

  Mixed Employment areas located outside of Urban Centres and Frequent Transit Development Areas are primarily intended for industrial and commercial uses that would not normally be attracted to these locations. Mixed Employment areas located outside of Urban Centres and Frequent Transit Development Areas may contain office and retail uses provided that they are at lower densities than typically higher density Urban Centres and Frequent Transit Development Areas and in locations well served by transit or have committed expansions to transit service. Residential uses are not intended in Mixed Employment areas.

The precise types of industrial activities intended and permissible are explained in regional context statements, which are prepared by member municipalities and accepted by the Metro Vancouver Board, as well as municipal land use plans and zoning bylaws.

Metro 2040 also supports other long range regional planning goals, such as accommodating population and employment growth, focusing commercial and housing development in Urban Centres, protecting agricultural and environmental lands, and supporting sustainable transportation.

The Regional Industrial Lands Strategy, completed in 2020, establishes a vision for the future of industrial lands across Metro Vancouver to the year 2050, and provides a set of recommendations to guide a broad range of stakeholder actions to achieve that vision.

As identified in the Strategy, the four main challenges facing Metro Vancouver's industrial lands are:

1. A constrained land supply
2. Pressures on industrial lands
3. Site and adjacency issues
4. A complex jurisdictional environment

In response to these challenges, the Strategy contains 34 recommendations with 10 priority actions, organized around four 'Big Moves':

1. Protect remaining industrial lands
2. Intensify and optimize industrial lands
3. Bring the existing land supply to market & address site issues
4. Ensure a coordinated approach

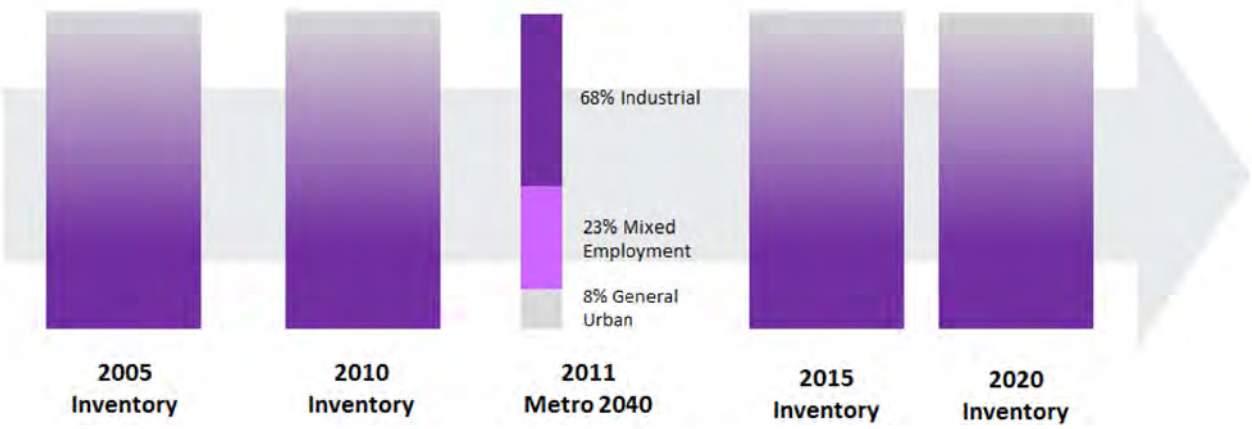
2 Industrial Lands Supply

2.1 Universe of Regional Industrial Lands Inventory

Metro Vancouver's regional interest in industrial lands emerged in the early 2000s. At that time, concern about the ongoing conversion of industrial lands to other uses became more prevalent and the scale of conversion, coupled with concern about a dwindling supply of available industrial land, led to the creation of a regional industrial lands taskforce, comprised of municipal members, that guided the completion of the first of the Regional Industrial Lands Inventories.

The types of lands included in the series of Regional Industrial Lands Inventories were based on municipal designation and zoning. This definition of industrial lands or the universe of the Inventory has remained consistent for the Inventories, which allows for comparison over time and tracking of lands (with some limitations, because of changing interpretation of municipal policies and data availability). The Inventory can also be analyzed relative to regional land use designations, as illustrated in the below figure.

Figure 2.1: Metro Vancouver Regional Industrial Lands Inventories



Scope of inventory remains consistent; *Metro 2040* provides a new filter.

The Inventories include 'Developed' industrial lands, spanning various industrial uses, quasi-industrial activities, and non-industrial uses, as well as 'Other / Vacant' lands that are vacant of industrial uses.

The universe or scope of lands included in the Regional Industrial Lands Inventory are all lands that are municipally designated (Official Community Plans, sub-area / neighbourhood plans, or equivalent) industrial, plus lands that are both zoned (or equivalent) industrial and used for industry, as of the date of the Inventory. Specifically, the Inventory universe consists of the lands that have one or more of the attributes listed in the below table. There are also smaller-scale industrial activities occurring on other lands not included in the Inventory.

Table 2.1: Lands Included in the Regional Industrial Lands Inventory

		MUNICIPAL LAND USE DESIGNATION	
		Designated Industrial	Designated Non-Industrial
DEVELOPED INVENTORY	Zoned Industrial	✓	✓
	Zoned Non-Industrial	✓	X
VACANT INVENTORY	Zoned Industrial	✓	X
	Zoned Non-Industrial	✓	X

✓ = included in Industrial Lands Inventory X = not included in Industrial Lands Inventory

Properties that were not designated industrial, but were zoned industrial (or zoned as comprehensive development with allowable industrial uses) and developed / used as industrial, were included and classified as 'Developed' (see definitions in Appendix 9).

The Inventory incorporates the Port of Vancouver, Vancouver International Airport (YVR), and Metro Vancouver's respective plan land use designations. All airport and port lands were included within their respective local host municipality. Known industrial lands on First Nation Reserves were included in the Inventory, and lands within the Tsawwassen First Nation were included.

The Inventory is generally considered at the parcel level. In some cases, it was appropriate to combine multiple legal parcels and associated data that are a functional industrial operation / business into a single 'site'. Only in unique or exceptional circumstances are properties 'split' into two sites for Inventory purposes (e.g. sites having more than one designation).

More particularly, 'Developed' and 'Other / Vacant' lands are defined as follows, as of the date of the Inventory:

- **'Developed'** lands are those with industrial and quasi-industrial uses. They also include lands with some non-industrial uses that are building intensive and not likely to redevelop to industrial uses. These uses include stand-alone retail and office, as well as media production, banquet hall / assembly, education / training, and recreation. These commercial uses are included in the Inventory because they are located on lands that are municipally designated industrial. Lands with visible outdoor storage are deemed to be 'Developed'. Lands with construction activity are also classified as 'Developed'.
- **'Other / Vacant'** includes lands that are totally vacant, as well as lands that have non-industrial holding uses that are likely to (re)develop to industrial uses. Specifically, this includes lands that are municipally designated Industrial, but are used for agriculture, residential, or resource extraction.

Some lands were at different stages of the development approval or permitting process at the time of the Inventory 'snapshot' date. If lands are undeveloped at that time, they were classified as 'Vacant' or as a non-industrial use, even if there is an active development application in process,

indicating imminent development. The development may be for a specific tenant, or built on speculation for an as-yet identified tenant.

2.2 Geographic Areas

Metro Vancouver (the Metro Vancouver Regional District) has 23 member jurisdictions, although only 16 have industrial lands. There are 9 geographic sub-regions for the purposes of reporting Inventory results. The following table and map show the sub-regions and municipalities .

The Inventory data was compiled at the site level and summarized by municipalities, sub-regions, and for the region as a whole. The majority of the Inventory data in the body of the report is presented at the regional and sub-regional levels; municipal level data is in Appendices 2 - 8.

Table 2.2: Geographic Sub-Regions and Municipalities

Sub-Region:	Municipalities included:
North Shore	City of North Vancouver, District of North Vancouver, *District of West Vancouver, Village of Lions Bay*
Vancouver	City of Vancouver, *University of British Columbia / University Endowment Lands (within the Electoral Area)*
Burnaby / New Westminster	City of Burnaby, City of New Westminster
North-east Sector	City of Port Moody, City of Coquitlam, City of Port Coquitlam, *Village of Anmore, Village of Belcarra*
Richmond	City of Richmond (including Vancouver International Airport)
Delta / TFN	City of Delta, Tsawwassen First Nation
Surrey / White Rock	City of Surrey, *City of White Rock*
Langleys	City of Langley, Township of Langley
Ridge – Meadows	City of Maple Ridge, City of Pitt Meadows

The municipalities in the table noted with *italics* do not contain any industrial lands as defined in this report.

Map 2.1: Geographic Sub-Regions

2.3 Factors Affecting Industrial Lands Capacity

Industrial lands are not all equally appropriate or viable for different types of industrial users, and location and site features are important factors for industrial users. There are various constraints that can affect the development capacity of industrial lands, for example location and site features. It is important to note that the lands inventoried and amounts reported are gross areas; various types of constraints or limitations will reduce the net developable amount of land.

Some lands have site-specific constraints, or pre-existing uses that may make it difficult to (re)develop with intensive industrial uses. Additionally, environmental constraints and natural hazards may reduce the amount of land that is potentially developable for industrial uses. Other constraints include: location and accessibility, established non-industrial uses, the availability of needed infrastructure for development, ownership patterns affecting land assembly, and smaller sites that may not be adequate for certain types of industrial development.

Some types of industries are better able to be accommodated in a wider range of locations, whereas other industries must have direct and reliable access to transportation infrastructure and other features. For example, businesses involved in trade, transportation, and logistics, proximity to highways, port terminals, and rail yards are of vital importance. Accordingly, poorly-located industrial lands are not an option for these types of users; other industries have less specific needs and can be accommodated in a wider range of locations.

Also of note, some lands may have legal / tenure or use limitations, such as lands owned by the airport authority which are restricted to airport related uses or port lands restricted to port related activities, but can still accommodate some forms of industry. Further, because of site constraints or land ownership patterns, as well as location and market factors, some lands may not be developed for some time. All of these factors will affect the potential for the industrial land supply to meet demand.

3 Lands Inventory Methodology

3.1 Approach

Metro Vancouver regional planning staff developed the methodology for the 2020 Inventory, building on past Inventories (2015, 2010, 2005), which was informed through discussions with municipalities, industry, and other stakeholders. The objective for the methodology is to create a clear set of rules that can be consistently applied using available information to systematically categorize industrial lands in the Metro Vancouver region.

While parts of the 2020 Inventory classification system are designed to be comparable with past Inventories to enable the measure of change over time, changes in the interpretation of municipal polices between Inventories have limited such comparisons. The 2015 Inventory was revised to permit comparison to the 2020 Inventory; the ability to compare with the earlier 2005 and 2010 Inventories have greater limitations.

The methodology outlines the sources from which data has been compiled, the scope or universe of lands included in the Inventory, and the definitions of the land use classifications. The ownership of the land, municipal zoning, municipal designation, regional designation, and other attributes, which may impact use and utilization, were also collected. Appendix 10 includes the details of the Inventory methodology and Appendix 11 includes the data collected.

3.2 Inventory Data Sources

Available data from multiple sources was linked together with an internal GIS system to create the database. Information used in the 2020 Inventory included:

- Parcel Map BC (2020 property parcels)
- BC Assessment Authority property information (2020)
- Municipal Business Licenses (2019-2020)
- Municipal Zoning and OCP Designation GIS files
- Orthophoto image (flown in 2018)
- Google Earth orthographic image (2018-2019)
- Industrial Brokerages (industrial site information)
- Draft review and guidance from municipal planning staff, industrial brokerage firms, plus YVR and Port representatives

Metro Vancouver would like to thank participants for their input and contribution throughout this process.

3.3 Improved Methodology for 2020 Inventory

In 2005 and 2010, Metro Vancouver completed Inventories of the industrial lands in the region. For those earlier Inventories, Metro Vancouver considered only whether the land was 'Developed' or

'Vacant' (as defined in those publications). In actuality, industrial lands have different types of uses, levels of utilization, and (re)development potential due to various site and area factors or characteristics.

With the availability of better information and additional technical work, the 2015 and 2020 Inventories include an enhanced data collection and classification system to address limitations inherent in earlier Inventories (2005 and 2010). Building on further work, the 2020 Inventory (as well as the revised 2015 Inventory) provides enhanced information about the industrial land supply through land use classifications, which provides fine-grain detail of the different types of uses on the lands.

3.4 Land Use Classifications and Definitions

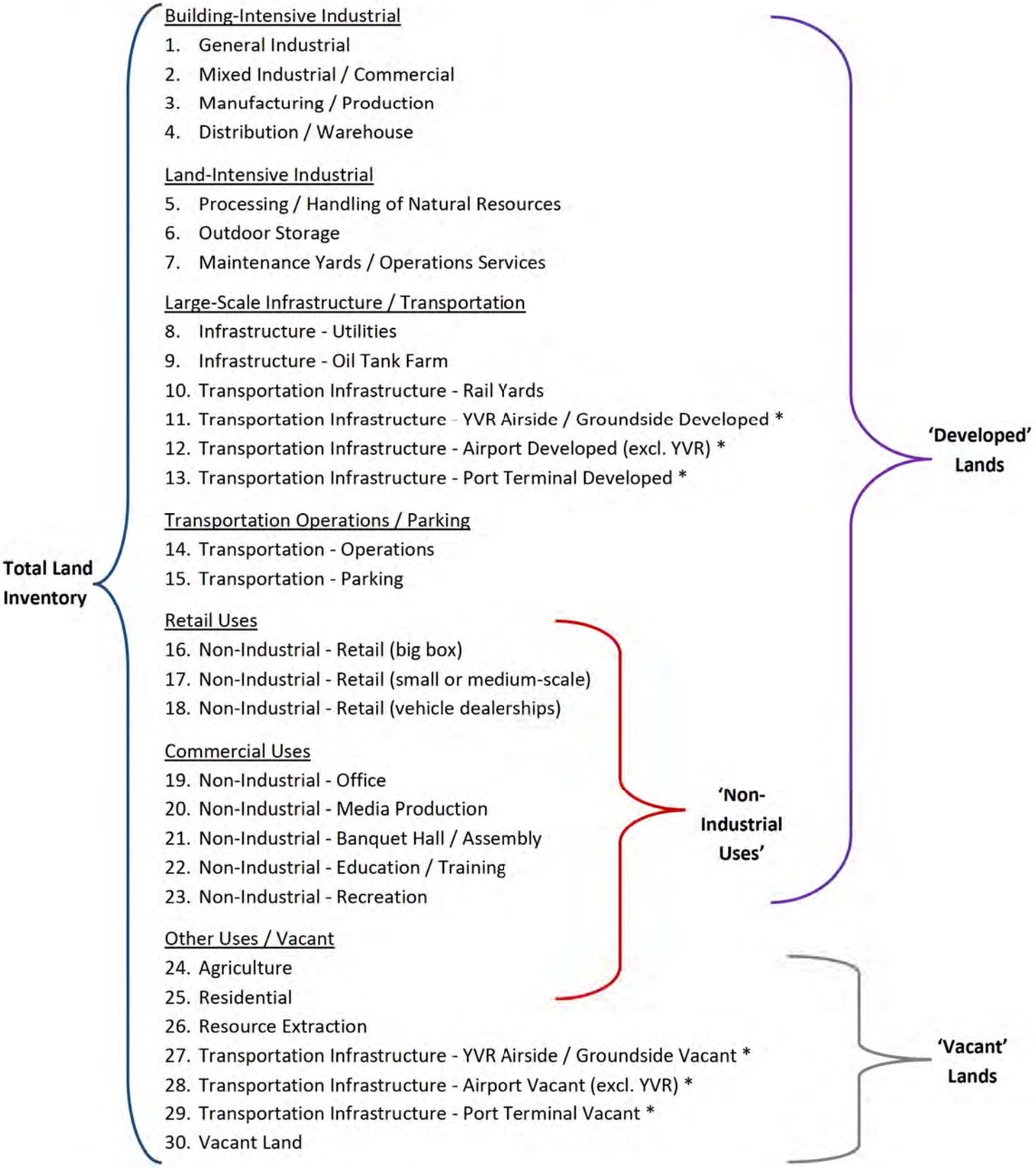
On the following page is the list of 30 land use classifications for the 2020 Inventory (full definitions are provided in Appendix 9), which provide a detailed and nuanced understanding of the industrial lands supply. For reporting purposes, these detailed land use classifications have in some cases been consolidated into 7 categories, as organized in the following figure.

The land use classification definitions reference the predominant or primary use of the site, including normally associated on-site accessory / ancillary uses (including parking and loading areas), as of mid-2020. Properties may include multiple or overlapping and non-discrete uses, in which case the predominant use is considered for the classification.

The process of classifying land uses was based on available information ranging from orthographic photos, business records, municipal permits, etc. It is acknowledged that the classification process cannot be perfectly accurate, given the variety of different data sources and currency. This limitation of selecting a single classification for each site is particularly acute in cases where there is a wider range of uses on lands or multiple level buildings. (In 2015, nearly half (47%) were within the broad category of 'Building Intensive - General Industrial', whereas for 2020, new land use classification categories were created, so as to reduce the amount of lands classified as 'General Industrial' to 40%).

* Note: These lands may have restrictions on tenure, use, and development and not available for general market industrial, but permit uses that are port or airport compatible. For more detailed information, refer to the YVR Master Plan or Port of Vancouver Land Use Plan, as applicable.

Figure 3.1: List of Detailed and Consolidated Land Use Classifications



3.5 Unique Types of Lands

There are a number of unique types of industrial and associated lands and uses in the region. These lands may have special attributes such as limitations on use, tenure, or development. For example, restrictions may apply to Vancouver International Airport and Port of Vancouver lands. Additional, airport and port lands, as well as those on Tsawwassen First Nation and First Nation Reserves, are only available to tenants as lease tenure rather than fee simple ownership. There may also be lands used for rail yards and infrastructure / utilities that are not 'market' lands. These types of lands may not necessarily be available to develop as all forms of industrial, but still support industrial and associated economic and transportation functions.

The below text explains some unique types of lands included in the Inventory.

Airports

Airports are a unique land use, and facilitate the transport of people and goods. Airport facilities and associated operations may have some industrial components, and other semi-related uses and activities. For the airports in the region (YVR, Pitt Meadows, Delta, and Langley), the runways and airfields are not included in the Inventory, nor are the terminal buildings / lands. Airside and groundside industrial lands ('Developed' or 'Other / Vacant') are included in the Inventory. Most of the developed industrial lands are used for airport maintenance and storage hangers.

Specifically for YVR Vancouver Airport Authority on Sea Island, it is important to note that these lands are distinct in terms of ownership, use, and development potential. These airport lands are neither municipally designated nor zoned, and not intended necessarily for conventional industrial purposes. YVR's Master Land Use Plan indicates how these lands are to be used; some to support the transportation gateway function, some to generate non-aeronautical revenue, and some for industrial type purposes associated with airport activities. Aeronautical restrictions may render some of the land inappropriate for development with restrictions to some degree.

Ports

Ports are a unique, water-dependent use that facilitate the import and export of goods by ship through different types of terminals, as well as people by way of cruise ship terminals. Port lands include a variety of different types of industrial and quasi-industrial uses and marine related activities, as well as lands owned by the port and leased to tenants with port-associated activities. The Port of Vancouver Land Use Plan indicates how these lands are to be used.

For the various port facilities fronting the ocean and river, the port terminal and docks are included in the Inventory as 'Transportation Infrastructure – Port Terminal', either 'Developed' or 'Vacant'. Surrounding non-port lands are classified according to their predominate use. Water lots do not have any land use classification and are not included in the Inventory.

3.6 Methodology Notes

It is also important to note the following when reviewing the Inventory results:

- All references to land areas are gross calculations – net developable areas are less;
- All references to land areas are in hectares (ha), unless otherwise noted;
- All references to land areas are as of the middle of the noted year;
- Classifications reflect actual use of the lands, as of mid-2020, not necessarily the zoning, designation, nor potential use of the lands;
- Current land use classifications are independent of future-oriented land use designations;
- The revised 2015 Inventory numbers in this report replace the previously published numbers in the 2015 Inventory report;
- Classification definitions reference the primary or predominant use of the site, including normally associated on-site accessory / ancillary uses, such as parking and loading areas;
- Properties may include multiple or overlapping and non-discrete uses, in which case the predominant use is considered for the classification;
- Although some lands do not have large buildings, they are still substantially utilized with outdoor activities;
- A 'site' may represent multiple separate legal properties consolidated for the purposes of the Inventory analysis;
- Only in unique circumstances are properties 'split' into two sites for Inventory purposes;
- Unassociated abutting properties could be consolidated to create larger developable sites to potentially accommodate larger industrial users; and
- Not all lands in the Inventory are viable for all types of industrial uses.

3.7 Report Limitations

During the course of preparing the Inventory, a number of limitations were identified and addressed as best as possible. These included: imperfect data; varying interpretations coupled with a desire to maintain consistency; multiple uses on a single site; 'shades of gray' between different types or levels of uses; type of use not always clear; and municipal plans that include 'mixed employment' designations / zoning that allow for a range of uses, both industrial and non-industrial. Also, data sources are from different periods, and accuracy cannot be confirmed in all cases.

This Inventory and report should not be relied upon to make site specific planning or development decisions or investments.

4 Regional Industrial Lands Inventory Results

The Metro Vancouver 2020 Regional Industrial Lands Inventory data was analyzed in several ways: by geography (regional, sub-regional, municipal), land use classification (detailed, consolidated), regulatory overlay (regional designation, municipal designation, municipal zoning), ownership (private, public, other), tenure (strata, fee simple), and site size. Further reporting about the development potential of the lands in the Inventory, such as proximity to transportation infrastructure and other features, and site physical constraints, may be explored in future studies.

This section begins by describing the Inventory at regional and sub-regional levels, with figures, tables, and maps. Detailed maps at the sub-regional level are in Appendix 1. Detailed tables at the sub-regional and municipal level are in Appendices 2-8. All land areas, unless otherwise stated, are in hectares (HA) and gross areas.

4.1 Industrial Lands Inventory

The Inventory (as defined further in this report) consists of 11,502 hectares (28,422 acres) of land.

4.1.1 Sub-Regions

The below figure and table show the amount and distribution of the Inventory lands among the nine sub-regions. The majority of the lands are located in the South of Fraser municipalities. Specifically, the largest areas and markets were:

- 2,534 ha in Surrey (22% of the Inventory)
- 1,741 ha in Richmond (15% of the Inventory)
- 1,655 ha in Delta / Tsawwassen First Nation (14% of the Inventory)

Figure 4.1: Inventory by Sub-Region (Ha)

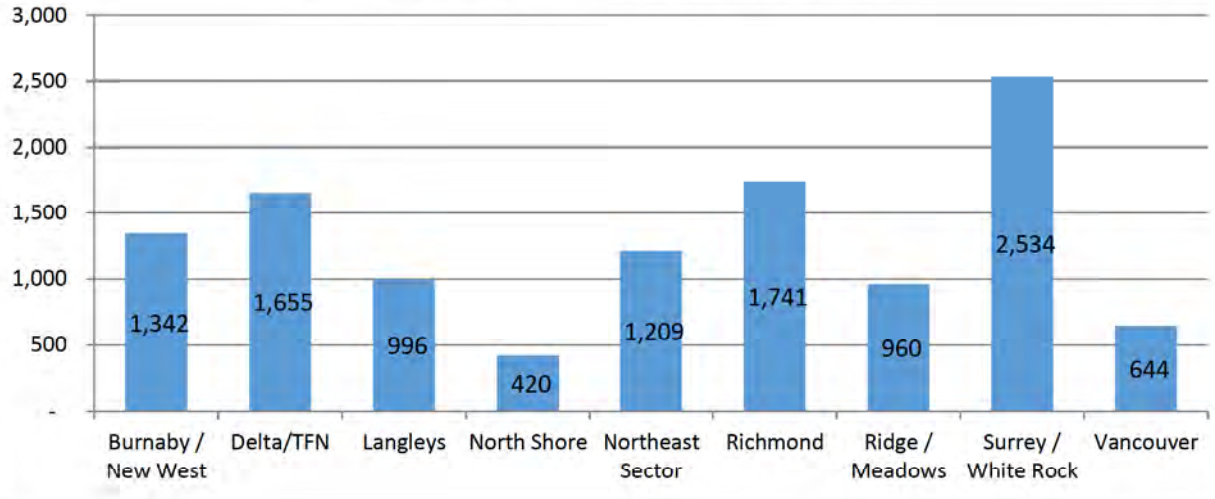


Table 4.1: Inventory by Sub-Region and Municipality

Sub-Region / Municipality	# of Parcels	Land Area - HA	Avg Parcel Size - HA	% of Total Lands
Burnaby/New West	1,317	1,342	1.0	12%
Burnaby	1,164	1,144	1.0	10%
New West	153	198	1.3	2%
Delta/TFN	720	1,655	2.3	14%
Delta	701	1,527	2.2	13%
TFN	19	128	6.7	1%
Langleys	809	996	1.2	9%
Langley City	133	85	0.6	1%
Langley Twp	676	912	1.3	8%
North Shore	444	420	0.9	4%
North Van City	129	136	1.1	1%
North Van Dist	315	284	0.9	2%
Northeast Sector	582	1,209	2.1	11%
Coquitlam	256	326	1.3	3%
Port Coquitlam	249	439	1.8	4%
Port Moody	77	444	5.8	4%
Richmond	1,118	1,741	1.6	15%
Richmond	1,118	1,741	1.6	15%
Ridge/Meadows	306	960	3.1	8%
Maple Ridge	275	735	2.7	6%
Pitt Meadows	31	226	7.3	2%
Surrey/White Rock	1,823	2,534	1.4	22%
Surrey	1,823	2,534	1.4	22%
Vancouver	1,450	644	0.4	6%
Vancouver	1,450	644	0.4	6%
Total	**8,569**	**11,502**	**1.3**	**100%**

4.1.2 Developed and Vacant Inventory

The 11,502 hectares of land in the Inventory have been categorized using 30 detailed land use classifications, which can be consolidated into seven groups, and further reported as two main categories, as was done in past Inventories:

- **'Developed'** (23 categories) – 9,387 ha (82% of the Inventory)
- **'Other / Vacant'** (7 categories) – 2,115 ha (18% of the Inventory)

By sub-region, the following table shows the distribution of 'Developed' and 'Other / Vacant' lands. The proportion of lands by sub-region varies greatly, with few 'Other / Vacant' lands in Vancouver and the North Shore, and more 'Other / Vacant' lands in the southern and eastern parts of the region.

Of all the 'Other / Vacant' lands in the region, 29% were in Surrey and 28% in Ridge-Meadows, however much of the latter lands were located far away from transportation infrastructure. See below figure and table for greater detail.

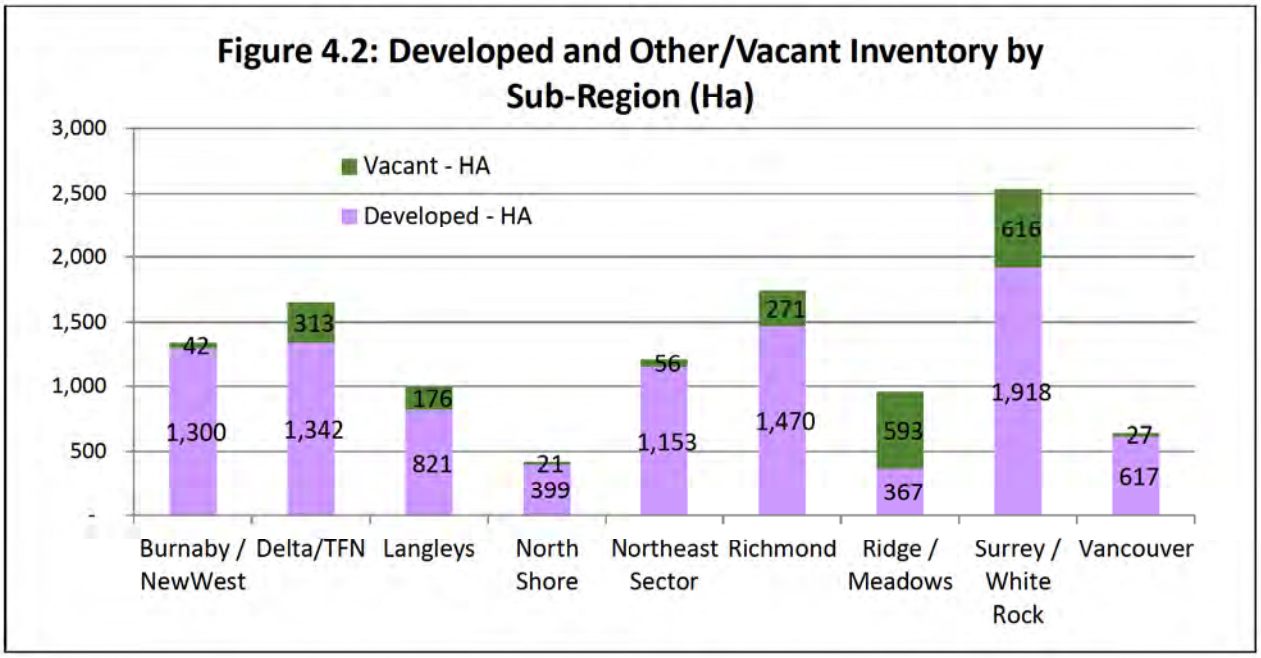


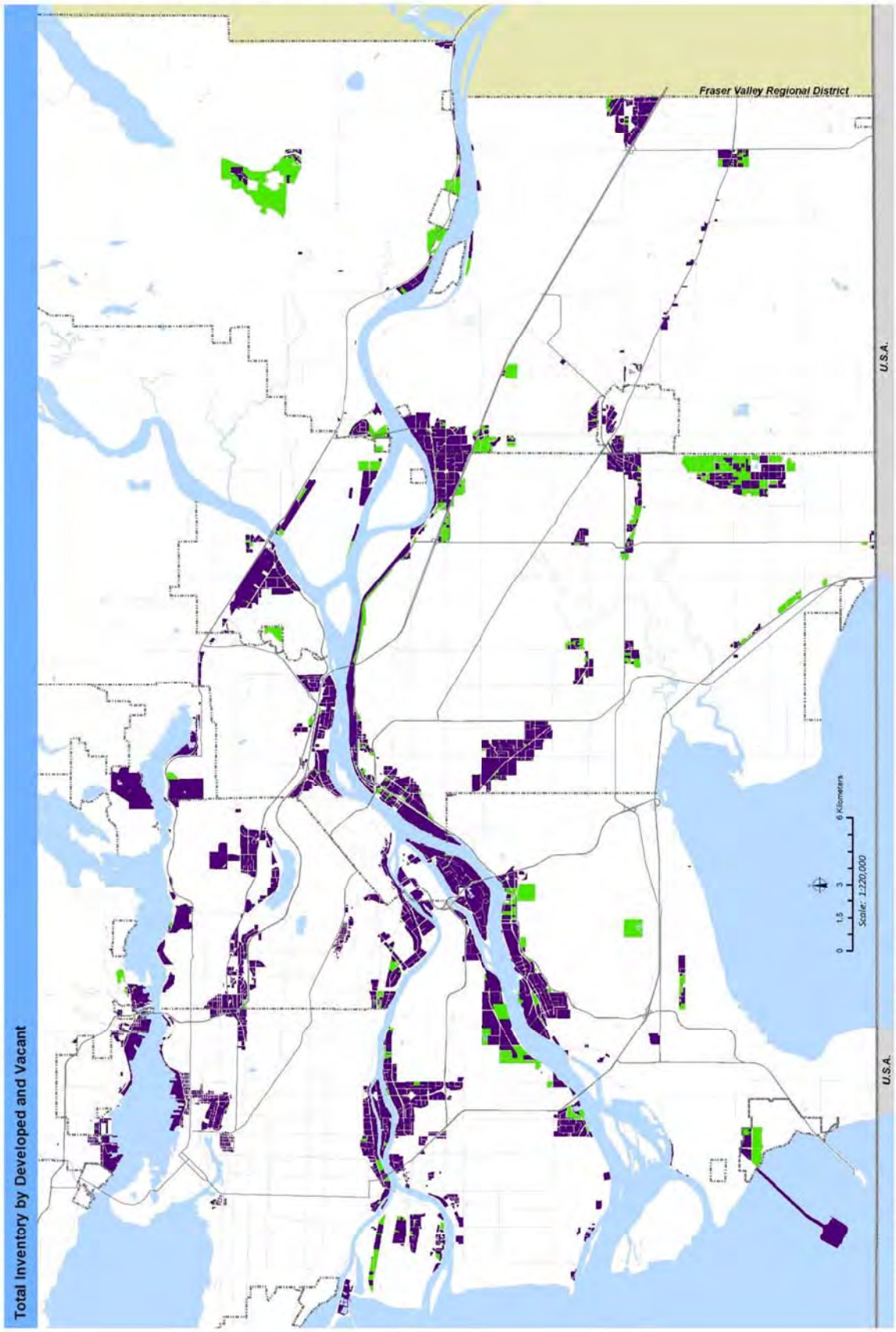
Table 4.2: Percentage Share of Other/Vacant Lands by Sub-Region

Sub-Regions	Developed - HA	Vacant - HA	Total Area - HA	% of Sub-Region's Lands Vacant	% Share of Region's Vacant Lands
Burnaby / NewWest	1,300	42	1,342	3%	2%
Delta/TFN	1,342	313	1,655	19%	15%
Langleys	821	176	996	18%	8%
North Shore	399	21	420	5%	1%
Northeast Sector	1,153	56	1,209	5%	3%
Richmond	1,470	271	1,741	16%	13%
Ridge / Meadows	367	593	960	62%	28%
Surrey / White Rock	1,918	616	2,534	24%	29%
Vancouver	617	27	644	4%	1%
Total	**9,387**	**2,115**	**11,502**	**18%**	**100%**

The following map shows the 'Developed' and 'Other / Vacant' lands in the region. Significant parts of the Inventory are located along the Fraser River, including Tilbury and Annacis Island in Delta, South Westminster in Surrey, south Coquitlam, as well as lands in Port Coquitlam and Port Kells in Surrey / Langley. Other notable areas are on the north and south sides of the Fraser River in Richmond and Vancouver, the North Shore, and Port Moody. Also, there are many industrial sites located throughout Burnaby, Surrey, and Langley.

The largest areas of 'Other / Vacant' lands can be found in south-east Surrey (Campbell Heights), north-east Maple Ridge, and on the Tsawwassen First Nation lands (by Roberts Bank Terminal), as well as some large sites in Delta.

Map 4.1: Inventory by Developed and Vacant Status



4.1.3 Land Use Classifications

Inventory lands are classified into 7 land use categories as shown in the following figure and table by sub-region. The largest category was 'Building Intensive - General Industrial' (40% of total), followed by 'Large Scale Infrastructure / Transportation' (25%). Other types of land uses, some of which are non-market industrial uses, make up smaller parts of the Inventory. Approximately 8% of the Inventory lands were used for 'Retail' and 'Commercial' (4% each) occurring on lands designated industrial, which puts further pressure on the limited industrial land base. The lands that were 'Other / Vacant' represent 18% of the Inventory.

Figure 4.3: Consolidated Land Use Classifications (Ha)

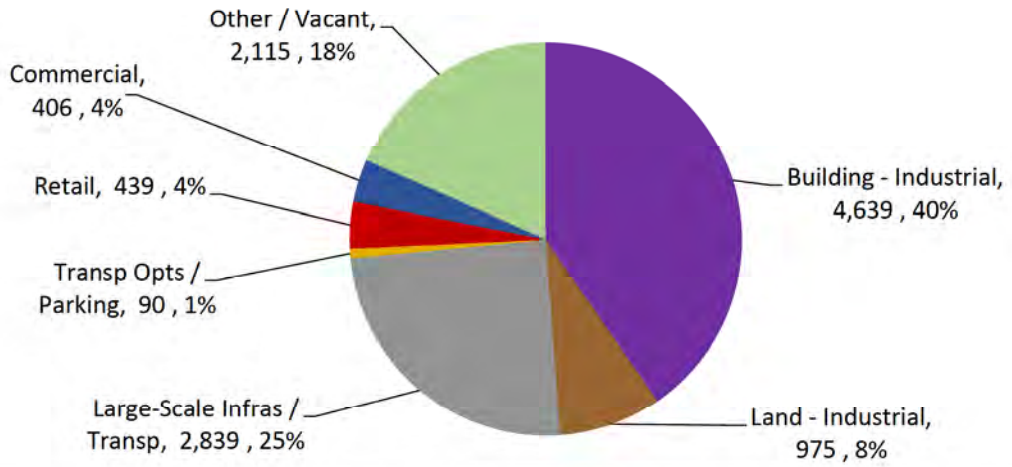
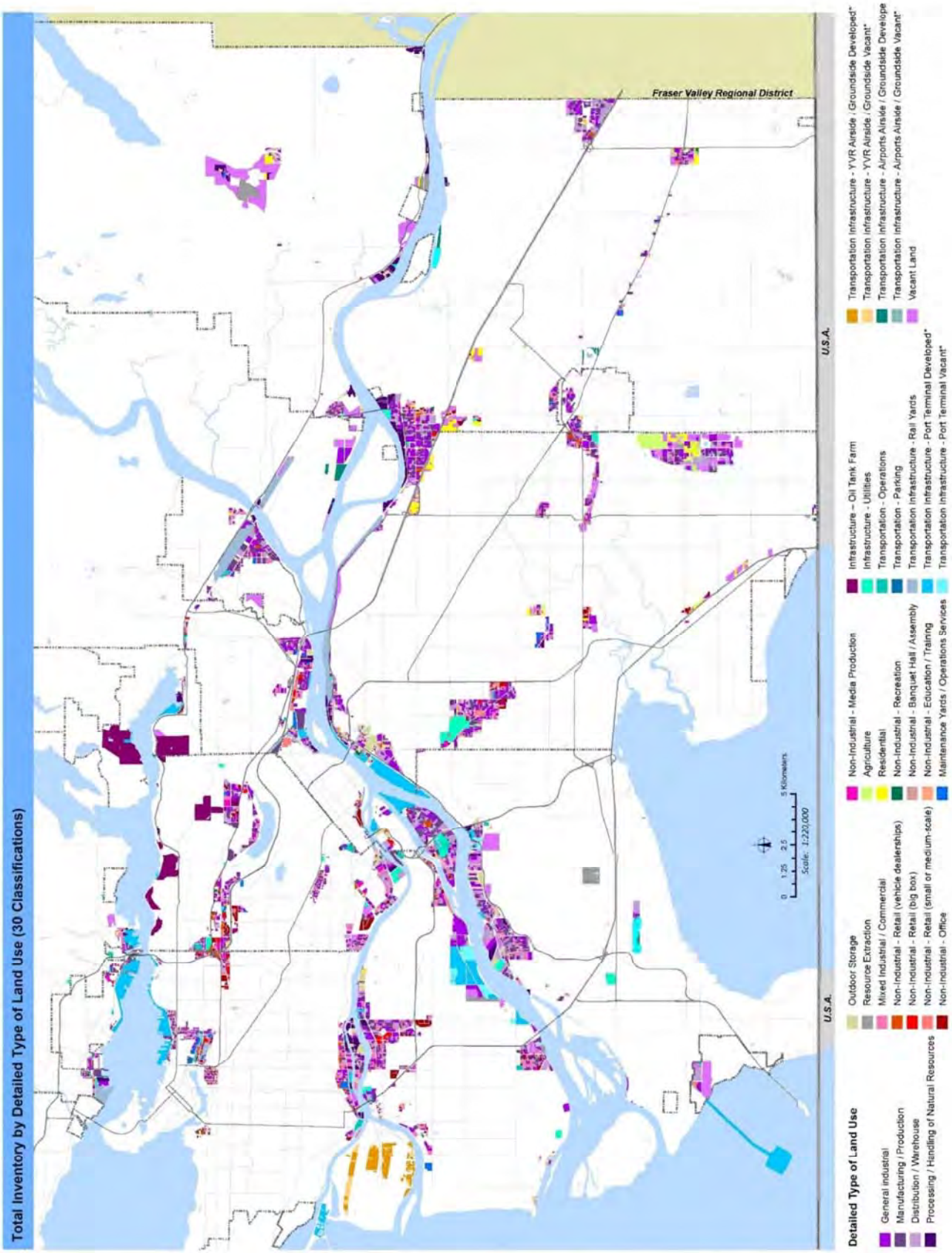


Table 4.3: Inventory by Consolidated Land Use Classifications

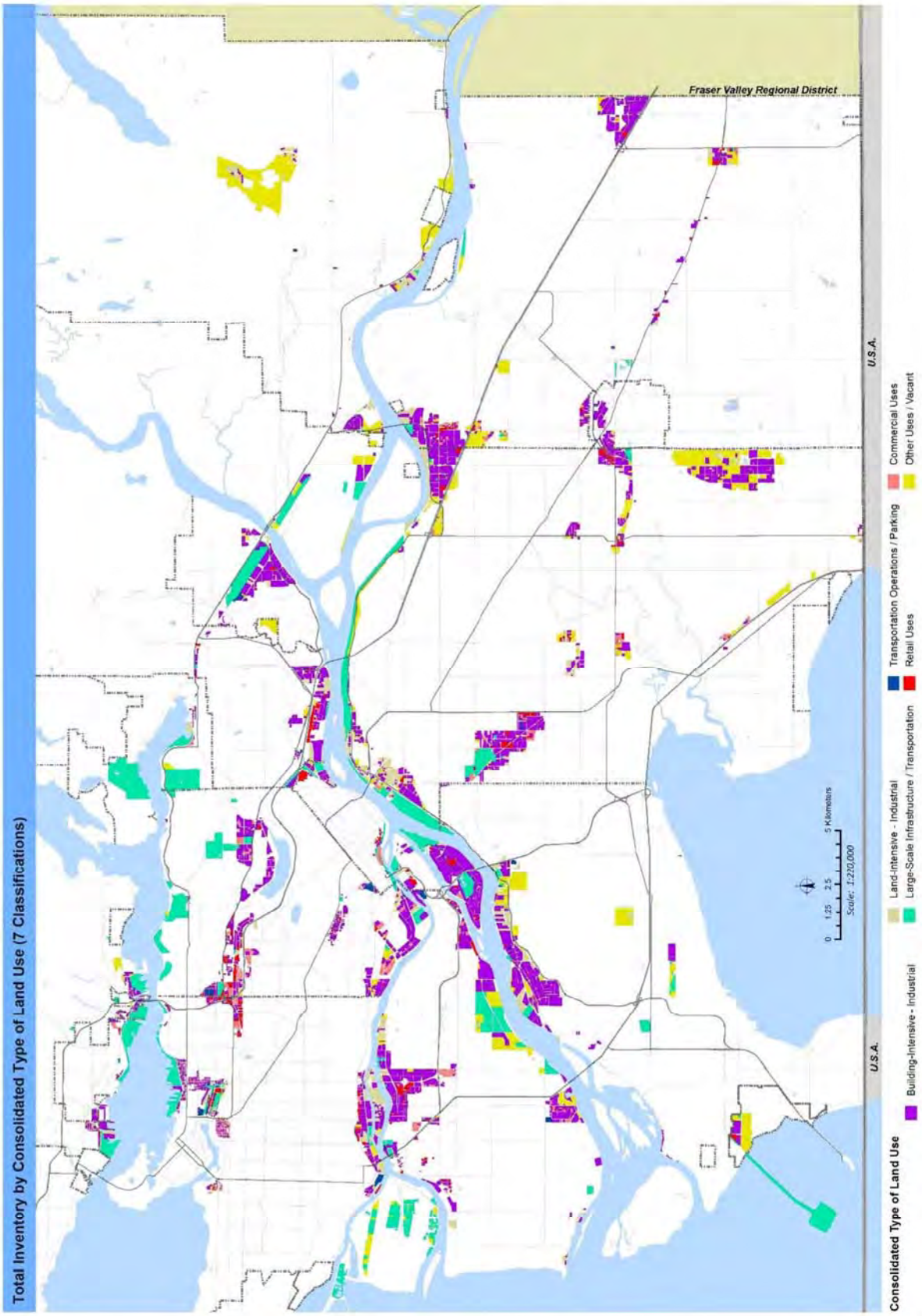
Land Use Category	# of Parcels	Area - HA	Avg Parcel	% of Total Lands
Building - Industrial	5122	4,639	0.9	40%
Land - Industrial	648	975	1.5	8%
Large-Scale Infras / Transp	429	2,839	6.6	25%
Transp Opts / Parking	63	90	1.4	1%
Retail	629	439	0.7	4%
Commercial	583	406	0.7	4%
Other / Vacant	1095	2,115	1.9	18%
Total	**8569**	**11,502**	**1.3**	**100%**

The following two maps show the detailed and consolidated land use classifications for the region, respectively. The largest category is 'General Industrial', shown as a shade of dark purple on the map.

Map 4.2: Inventory by Detailed Type of Land Use (30 Classifications)



Map 4.3: Inventory by Consolidated Type of Land Use (7 Classifications)



4.1.4 Policy Protection and Future Intent for Industrial Lands

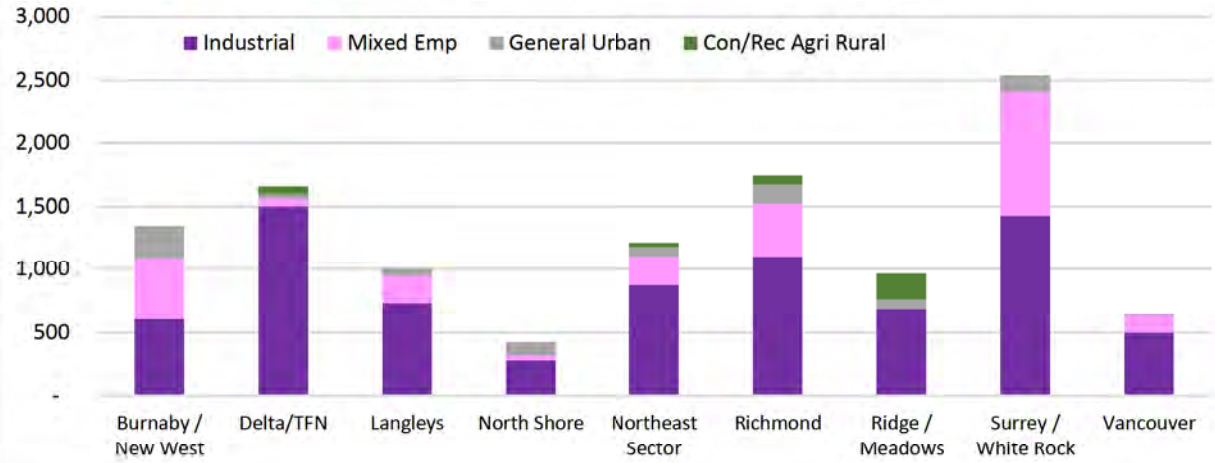
Properties have different land use designations and zoning due to a variety of reasons, some reflecting historical uses and others reflecting forward-looking policy intent. In some cases, municipalities may have policies in place to protect long-term industrial uses, whereas in other situations the plan may be to allow for change. Accordingly, industrial lands have a range of policy 'protections' (land use designations and zoning) from conversion to other uses.[4]

Industrial lands that are designated in regional (*Metro 2040*) and municipal (OCP, area plans, or equivalent) plans as industrial and also municipally zoned (or equivalent) industrial have the greatest policy 'protection' and are most likely to remain industrial for the long-term. Conversely, lands that are used for industry and zoned industrial, but not designated industrial, are more likely to, or are intended to, redevelop to a non-industrial use reflecting the applicable land use designation.

Regional Land Use Designations

Metro 2040, the regional growth strategy, provides for parcel-based land use designations for the region. In preparing the 2011 *Metro 2040* land use designations, most municipal industrial lands were designated either *Metro 2040* 'Industrial' or 'Mixed Employment', however there were exceptions. As shown in the following figure and table, as of 2020, 89% of lands in the Inventory were regionally designated either 'Industrial' (67%) or 'Mixed Employment' (22%).

Figure 4.4: Regional Designation by Sub-Region (Ha)



[4] Zoning generally reflects current land use (zoning bylaw), and designations generally reflect future land use (municipal, regional). Zoning does not typically reflect forward-looking policy intent, and designations do not reflect historic uses.

Table 4.4: Developed and Other/Vacant Lands by Regional Designation

RGS Designation	Developed	Vacant	Total	% of Total
Con Rec	119		119	1%
Rural	18	183	202	2%
Agricultural	19	31	50	0%
General Urban	756	125	880	8%
Mixed Emp	1,971	597	2,569	22%
Industrial	6,503	1,179	7,681	67%
Total	**9,387**	**2,115**	**11,502**	**100%**

Metro 2040 'Industrial' lands are intended for heavy and light industrial activities and appropriate accessory uses, while 'Mixed Employment' lands have more flexibility in terms of use and are intended for industrial, commercial, and other employment related uses to help meet the needs of the growing regional economy. As the 'Mixed Employment' designation permits a broader range of uses, industrial uses on these lands face competition from commercial-oriented uses. Similarly, industrial uses on 'General Urban' lands, which comprised 8% of the Inventory, and are intended for all land use types, will likely convert to other uses over the long-term, which will lead to displacement of existing industrial users on those lands.

Metro 2040's multiple goals and objectives result in competing policy priorities. For example, both the protection of industrial lands and the development of lands in Urban Centres and near rapid transit stations for housing and jobs are regional priorities. In cases where industrial lands are located within Urban Centres, achieving both objectives may be a challenge.

5% of the Inventory lands were located within defined Urban Centre overlays. More particularly, 25% of the Inventory lands regionally designated 'General Urban' were located in Urban Centres. Most regionally designated Industrial and Mixed Employment lands were located outside of Urban Centres, as shown in the following table.

Table 4.5: Inventory by Urban Centre Overlay and Regional Designation

RGS Designation	RGS Urban Centre	RGS Non Centre	Total
Con Rec		119	119
Rural		202	202
Agricultural		50	50
General Urban	220	661	880
Mixed Emp	90	2,479	2,569
Industrial	253	7,428	7,681
Total	**563**	**10,939**	**11,502**

Conversely, as shown in the following table, a higher proportion of Retail, Commercial, and Transportation Operations / Parking uses were located on industrial lands in Urban Centres.

Table 4.6: Inventory by Urban Centre Overlay and Consolidated Land Use Classification

Consolidated Land Use Classification	RGS Centre	Non Centre	Total
Building - Industrial	285	4,354	4,639
Land - Industrial	34	941	975
Large-Scale Infra / Transp	109	2,730	2,839
Transp Opts / Parking	24	65	90
Retail	61	378	439
Commercial	36	370	406
Other / Vacant	15	2,100	2,115
Total	**563**	**10,939**	**11,502**

Even though the policy tools, in the form of land use designations and zoning, most often reflect the intent of the local government, the conversion of these industrial lands to other uses reduces the supply of industrial lands and displaces industrial tenants / users.

Municipal Land Use Designations and Zoning

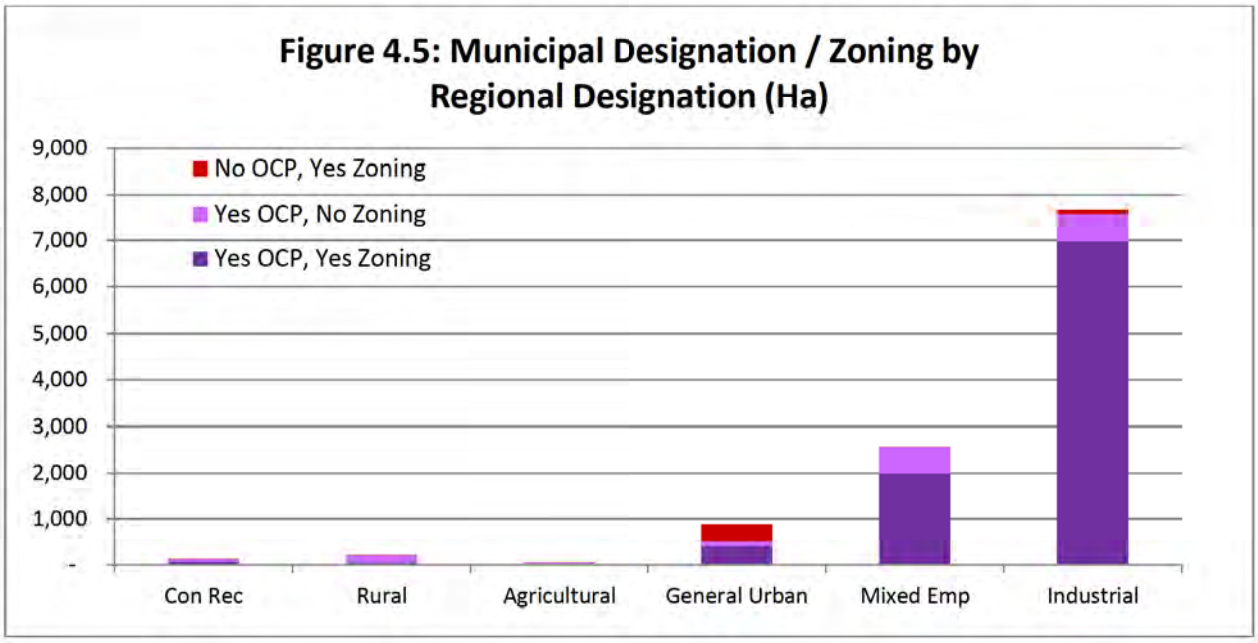
The following section with tables and figures shows the distribution of lands by municipal designation and municipal zoning, by regional designation, and by consolidated land use classification.

82% (9,470 ha) of lands in the Inventory were both municipally designated and zoned industrial. These municipal policies (designation and zoning), along with applicable regional designations, secure the long-term industrial use of the lands. Of these lands, 6,971 ha (74%) were regionally designated 'Industrial', 1,989 ha (21%) 'Mixed Employment', and 391 ha (4%) 'General Urban', as shown in the following table.

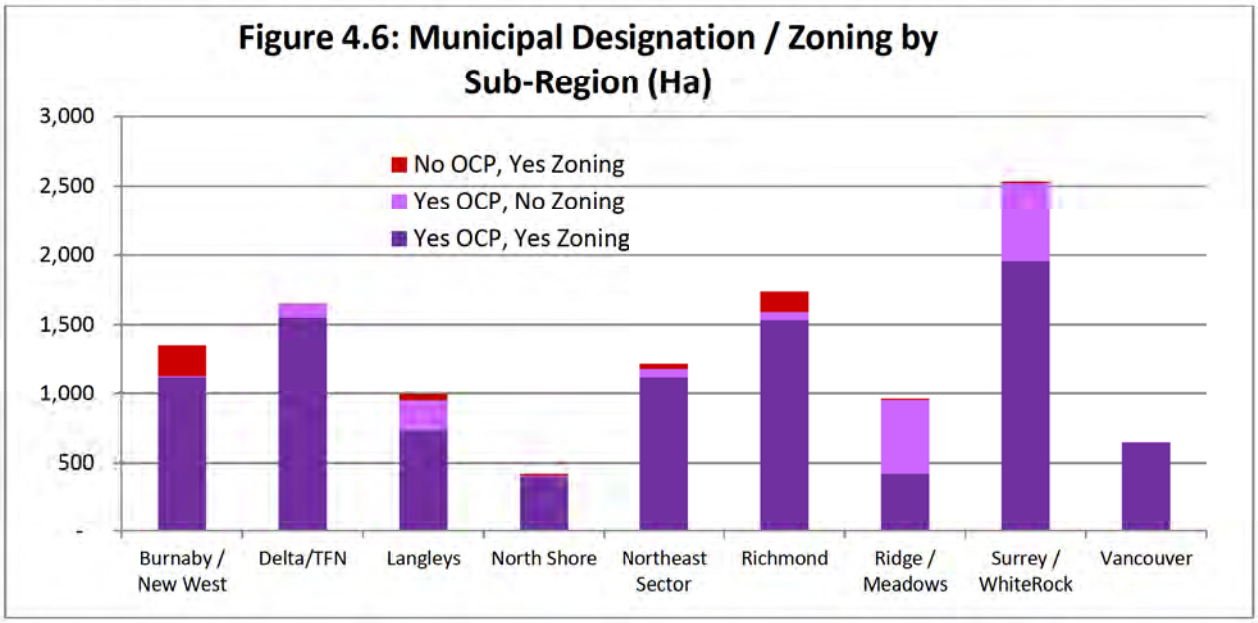
Table 4.7: Regional and Municipal Policy Designations

RGS Designation	Yes OCP, Yes Zoning	Yes OCP, No Zoning	No OCP, Yes Zoning	Total - HA
Con Rec	58	58	4	119
Rural	43	159	0	202
Agricultural	18	30	2	50
General Urban	391	105	385	880
Mixed Emp	1,989	577	3	2,569
Industrial	6,971	619	92	7,681
Total	**9,470**	**1,548**	**484**	**11,502**

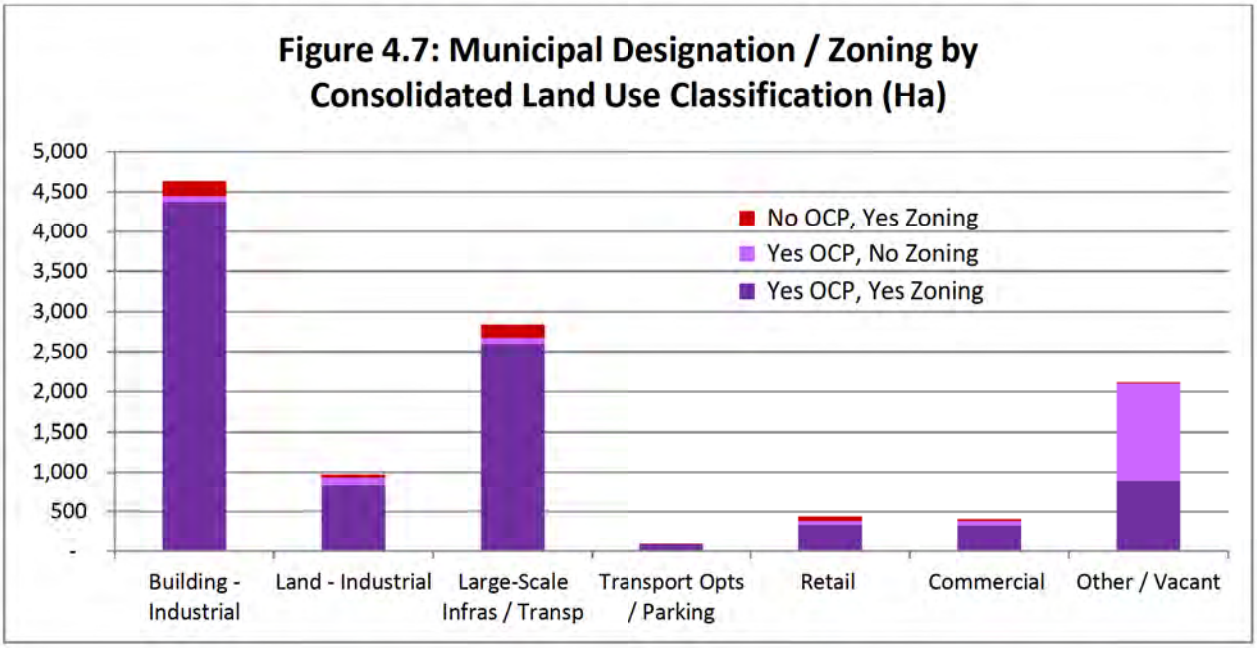
13% (1,548 ha) of the Inventory was municipally designated industrial but not zoned industrial, generally meaning it is not used for industrial, but is envisioned to be in the future. 484 ha (4%) had industrial zoning but not a municipal industrial designation, which results in diminished ability to ensure the long-term industrial use of the lands. The lands represented in red in the following figures (No OCP Industrial designation, Yes Industrial zoning), are most likely to be redeveloped to other uses in the future. These lands were mostly regionally designated 'General Urban'.

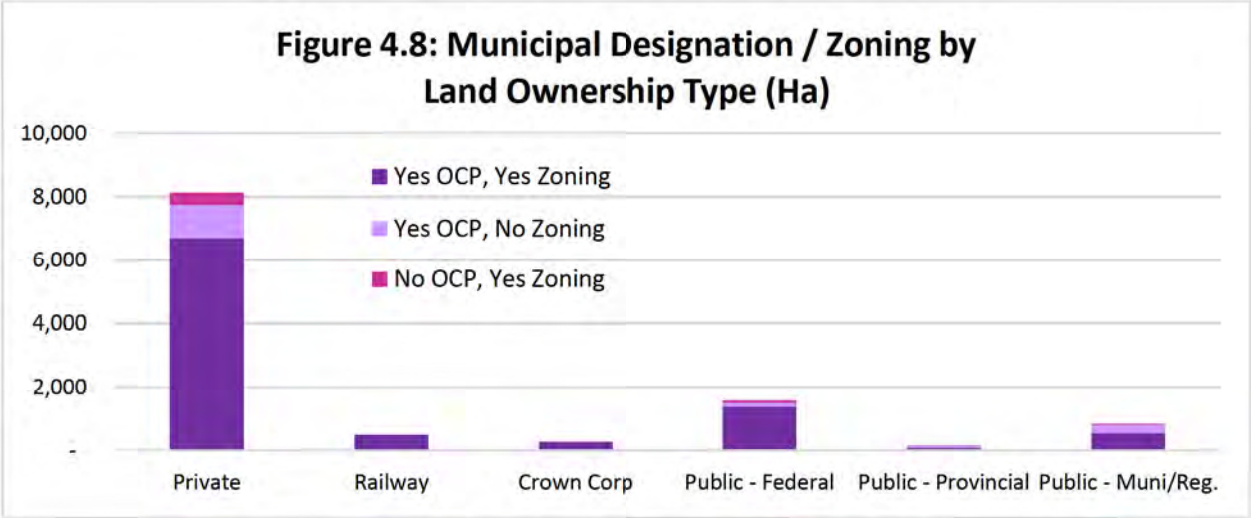


In terms of the lands that were zoned industrial but not designated industrial, they were distributed by sub-region as follows: 45% were located in Burnaby / New Westminster, and 31% in Richmond. Over a third each of lands that were municipally designated industrial but not zoned industrial were located in Surrey (37%) and Ridge / Meadows (34%), much of this was 'Other / Vacant'.



Most of the industrial lands were protected with both municipal industrial designation and municipal industrial zoning (approximately 85-95%, depending on the land use), while the lands with 'Commercial' and 'Retail' uses were less likely to be designated industrial and/or zoned industrial. The following figures show the lands with the level of policy protection.





Industrial Lands in Urban Centres

The region's 26 Urban Centres are identified in the regional growth strategy as targeted locations for population and job growth. As shown in the following table, there were 563 ha of lands in the Inventory located in the Urban Centres (overlays). Of these lands, 76% had municipal Industrial designations. In terms of regional designations, 45% were 'Industrial', 16% were 'Mixed Employment', and 39% were 'General Urban'.

Table 4.8: Lands in Urban Centres by Regional Designation

RGS Designation	RGS Urban Centre	RGS Non Centre	Total
Con Rec		119	119
Rural		202	202
Agricultural		50	50
General Urban	220	661	880
Mixed Emp	90	2,479	2,569
Industrial	253	7,428	7,681
Total	**563**	**10,939**	**11,502**

The following figures show that while most Inventory lands were located outside of Urban Centres, some 'Building Intensive Industrial', 'Retail', and 'Large-Scale Infrastructure / Transportation' uses were located within Urban Centre overlays. A higher proportion of industrial lands in the City of Vancouver were located within Urban Centres (i.e. the large Metro Core).

Figure 4.9: Urban Centre Overlay by Consolidated Land Use Classifications (Ha)

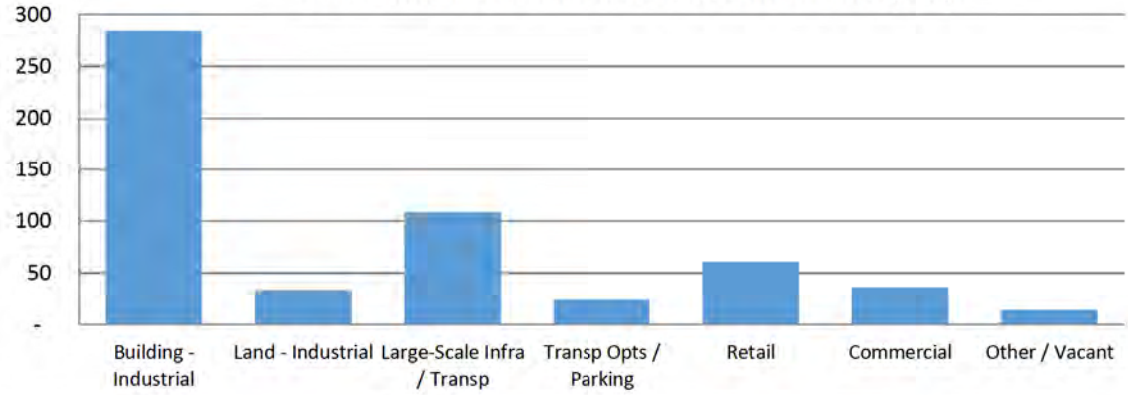
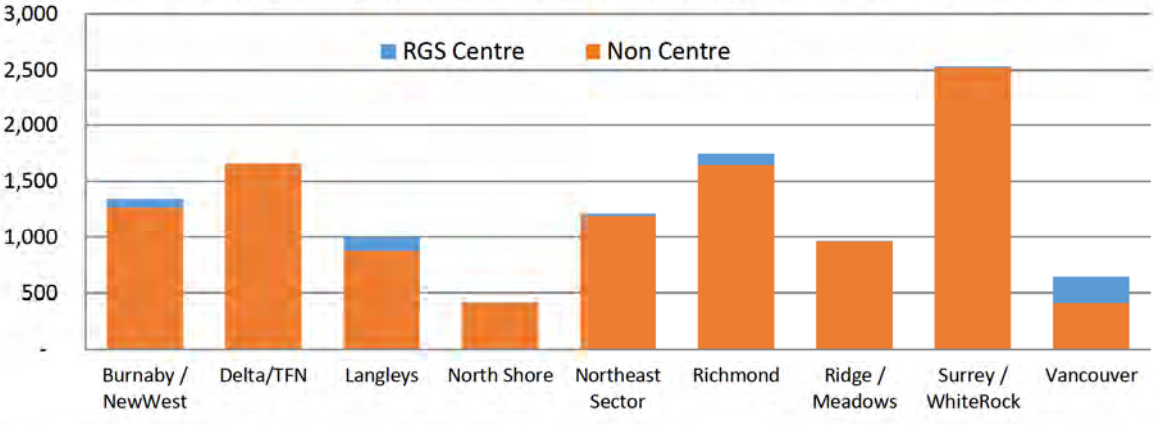
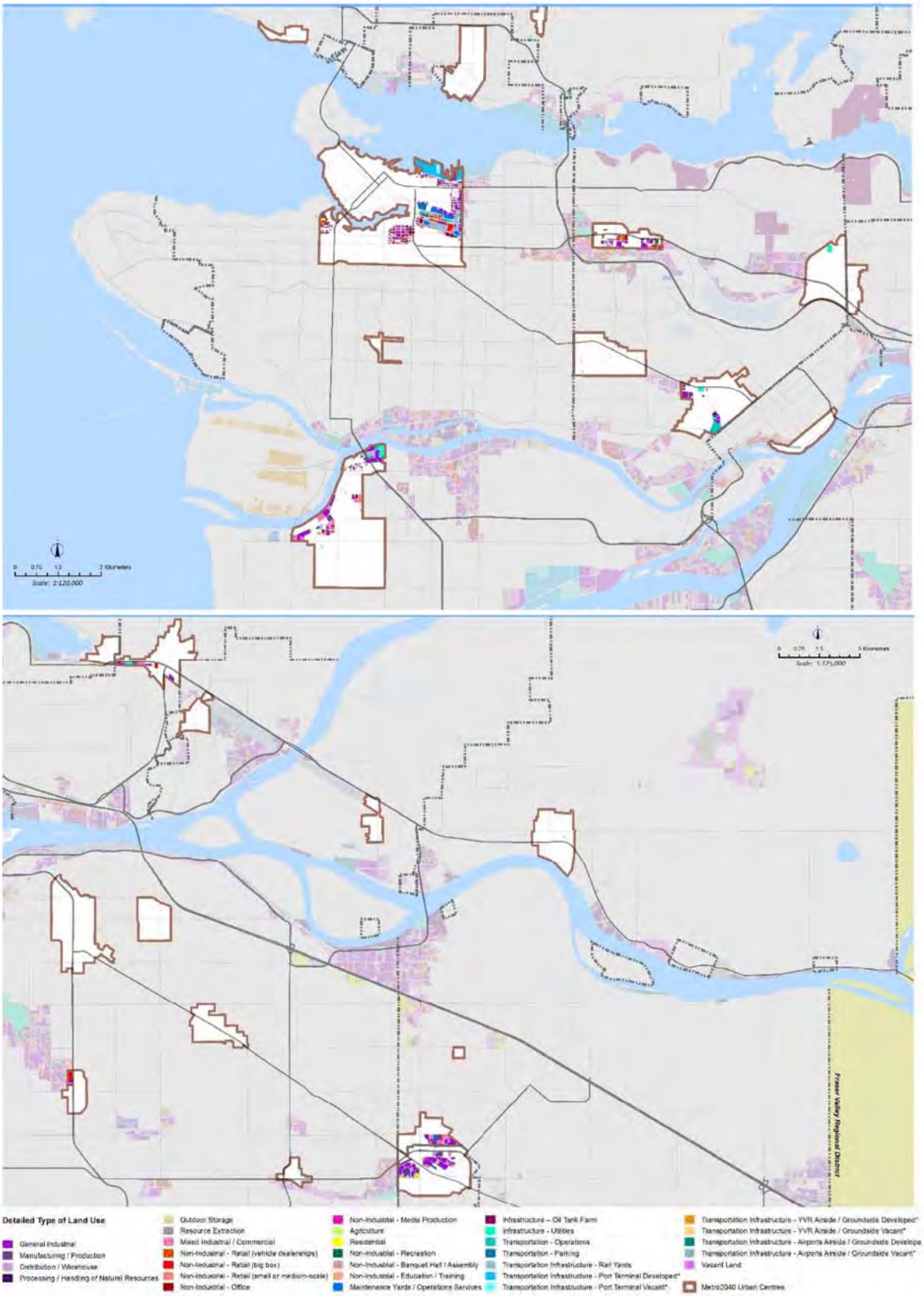


Figure 4.10: Urban Centre Overlay by Sub-Region (Ha)



The following map profiles Inventory lands located within regional Urban Centres.

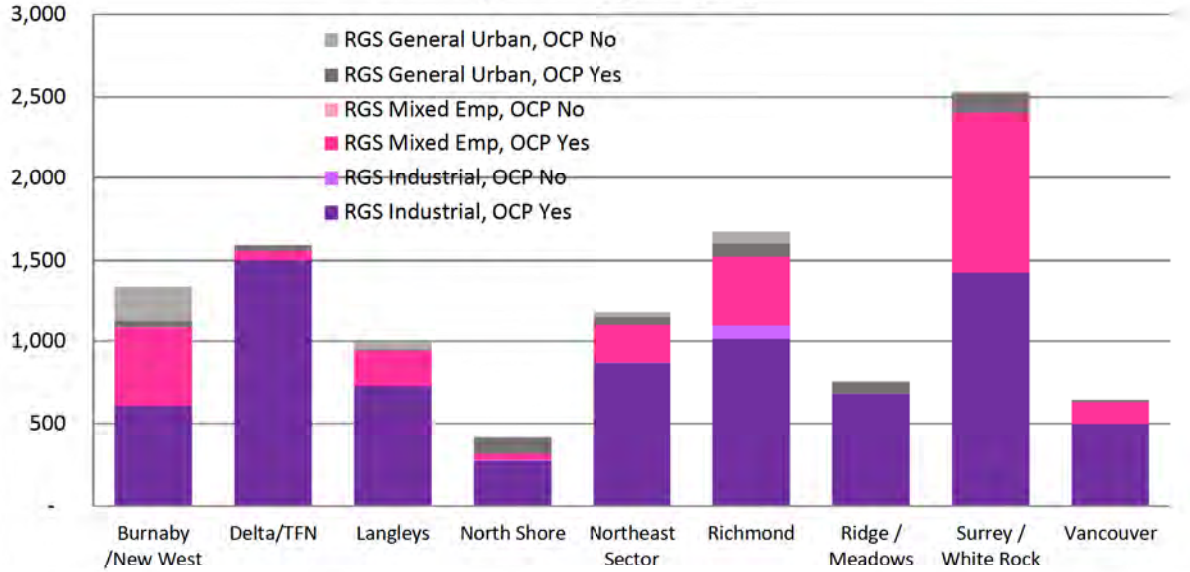
Map 4.4: Inventory within Regional Urban Centres



Regional and Municipal Land Use Designations

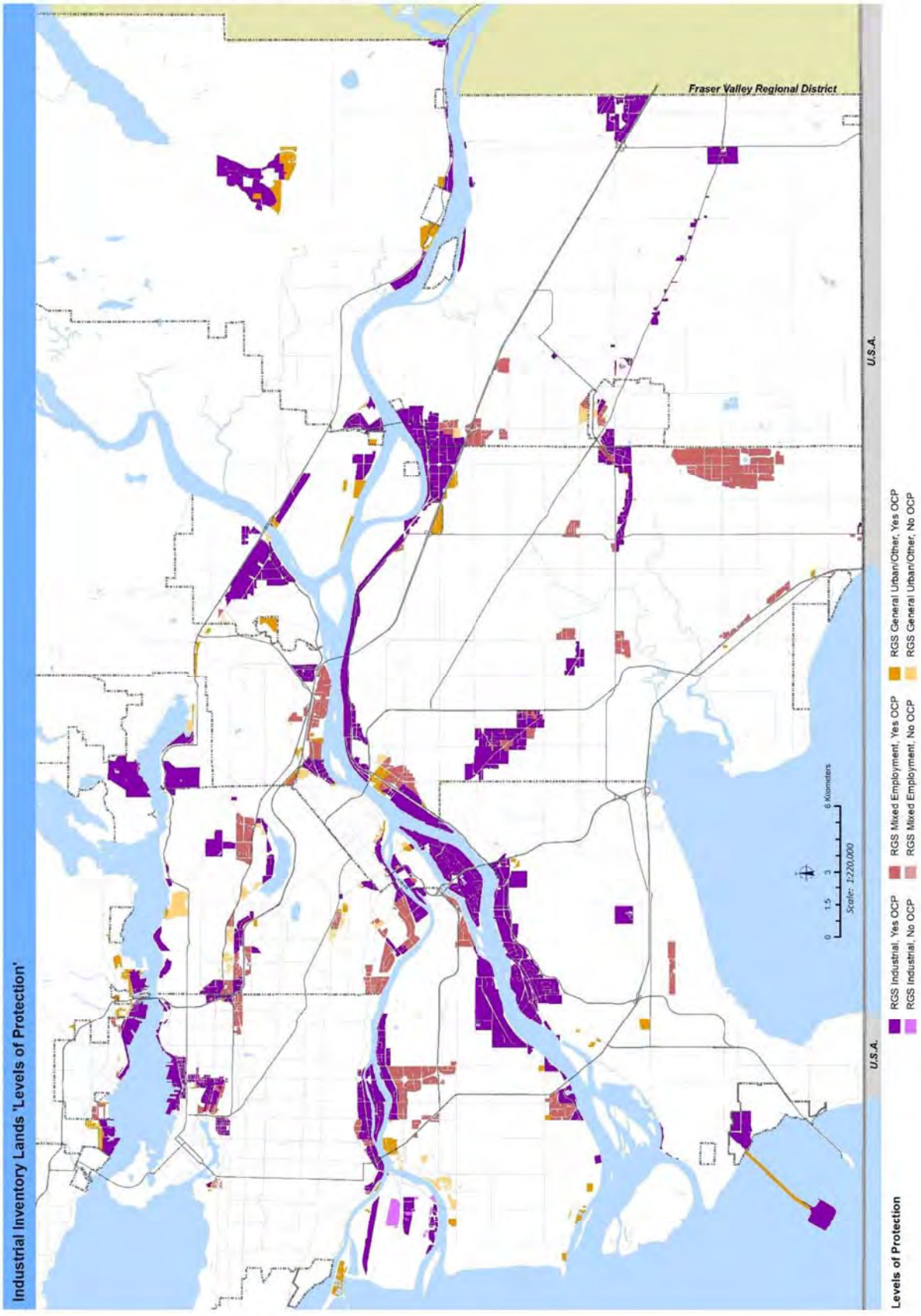
The following figure shows both regional and municipal land use designations, independent of zoning. Notably, most of the lands in Delta / Tsawwassen First Nation were regionally designated 'Industrial' and also municipally designated industrial; whereas 45% of the lands in Burnaby / New Westminster and 39% in Surrey were regionally designated 'Mixed Employment'.

Figure 4.11: Regional Designation and Municipal Policies by Sub-Region (Ha)



The following map shows the Inventory by regional and municipal land use designations. The lands with the greatest level of land use designation policy protection are shown in dark purple, while the lands in pink and orange are intended or are at greater likelihood to convert to other uses.

Map 4.5: Inventory Level of Policy Protection



Vacant Lands

Specifically for the 'Other / Vacant' component of the Inventory (2,115 ha), 56% were regionally designated as 'Industrial' and 28% as 'Mixed Employment'. Over half (57%) of the 'Other / Vacant' lands had municipal industrial designations, but did not have industrial zoning, as shown in following figure and associated tables.

Figure 4.12: Vacant Lands by Regional Designation and Municipal Designation / Zoning (Ha)

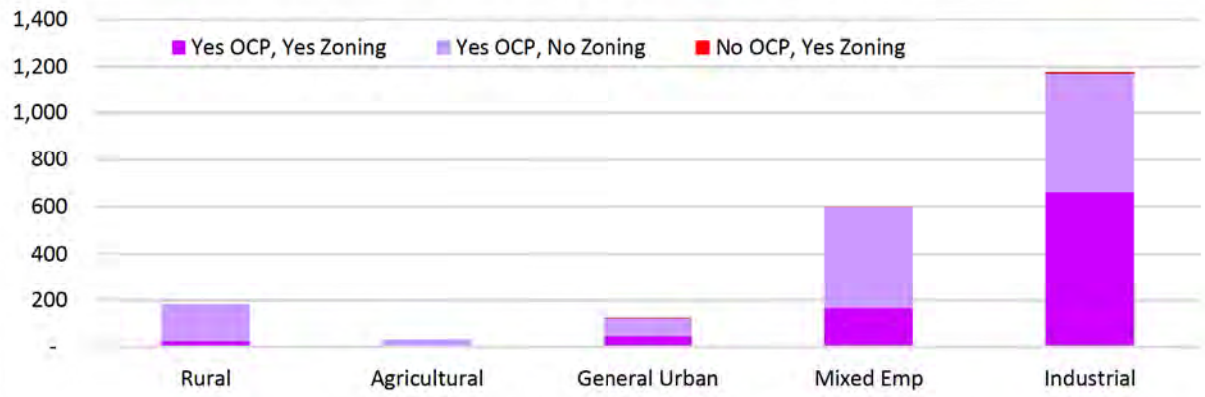


Table 4.9: Developed and Other/Vacant Lands by Regional Designation

RGS Designation	Developed	Vacant	Total	% of Total Land
Con Rec	119		119	1%
Rural	18	183	202	2%
Agricultural	19	31	50	0%
General Urban	756	125	880	8%
Mixed Emp	1,971	597	2,569	22%
Industrial	6,503	1,179	7,681	67%
Total	**9,387**	**2,115**	**11,502**	**100%**

Table 4.10: Other/Vacant Lands by Regional Designation and Municipal Designation / Zoning

RGS Designation	Yes OCP, Yes Zoning	Yes OCP, No Zoning	No OCP, Yes Zoning	Total
Rural	25	159		183
Agricultural	1	30		31
General Urban	46	76	3	125
Mixed Emp	166	431	1	597
Industrial	662	510	7	1,179
Total	**899**	**1,205**	**10**	**2,115**

Table 4.11: Other/Vacant Lands by Municipal Designation / Zoning by Sub-Region

Sub Region	Yes OCP, Yes Zoning	Yes OCP, No Zoning	No OCP, Yes Zoning	Total
Burnaby/New West	35	7	0	42
Delta/TFN	228	84		313
Langleys	25	149	2	176
North Shore	20	1		21
Northeast Sector	23	33	0	56
Richmond	264		6	271
Ridge/Meadows	83	510	1	593
Surrey/White Rock	194	421	1	616
Vancouver	27			27
Total	**899**	**1,205**	**10**	**2,115**

Table 4.12: Other/Vacant Lands by Detailed Land Use Classification and by Sub-Region

Sub Region	Burnaby / New West	Delta/TFN	Langleys	North Shore	Northeast S	Richmond	Ridge / Meadows	Surrey / White	Vancouver	Total
Agriculture	0		4					135		139
Residential	5	1	74	1	2	4	27	102	6	223
Resource Extraction		66		1	5	41	106	13		232
YVR Vacant						62				62
Airports Vacant (excl. YVR)		21	10							31
Port Terminal Vacant	4	12		1		97		1	3	118
Vacant Land	33	212	88	18	48	66	460	365	18	1,309
Total	**42**	**313**	**176**	**21**	**56**	**271**	**593**	**616**	**27**	**2,115**

Table 4.13: Other/Vacant Lands by Detailed Land Use Classification and Regional Designation

RGS Desigantion	Rural	General Agricultural	Urban	Mixed Emp	Industrial	Total
Agriculture				133	6	139
Residential	19		42	115	47	223
Resource Extraction	9		5	18	200	232
YVR Vacant					62	62
Airports Vacant (excl. YVR)				21	10	31
Port Terminal Vacant			8		109	118
Vacant Land	154	31	69	310	744	1,309
Total	**183**	**31**	**125**	**597**	**1,179**	**2,115**

4.1.5 Land Ownership Type

71% of the lands in the Inventory were privately owned, with an additional 4% owned by railways. The balance of lands (25%) were owned by various levels of government:

- 14% federal government (including port and airport lands);
- 2% provincial government; and
- 7% local government (municipal, regional, and TransLink).

This is illustrated in the following two figures and table.

Figure 4.13: Inventory by Land Ownership Type (Ha)

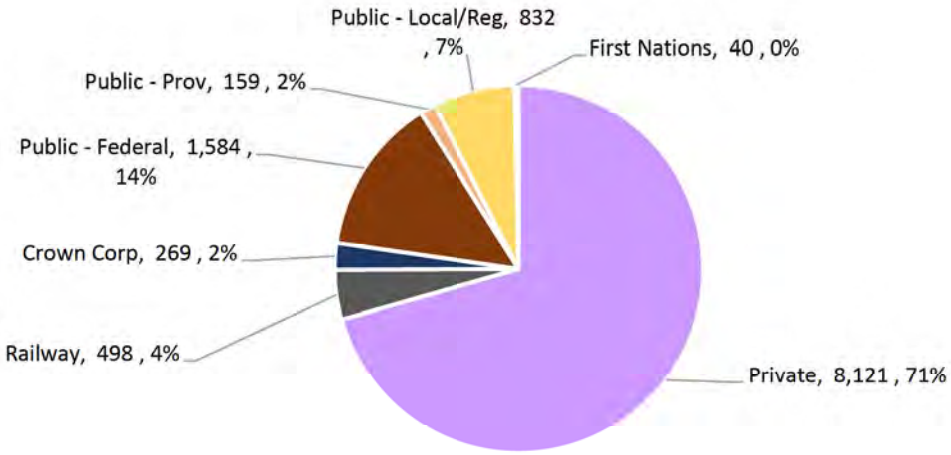


Figure 4.14: Land Ownership Type by Sub-Region (Ha)

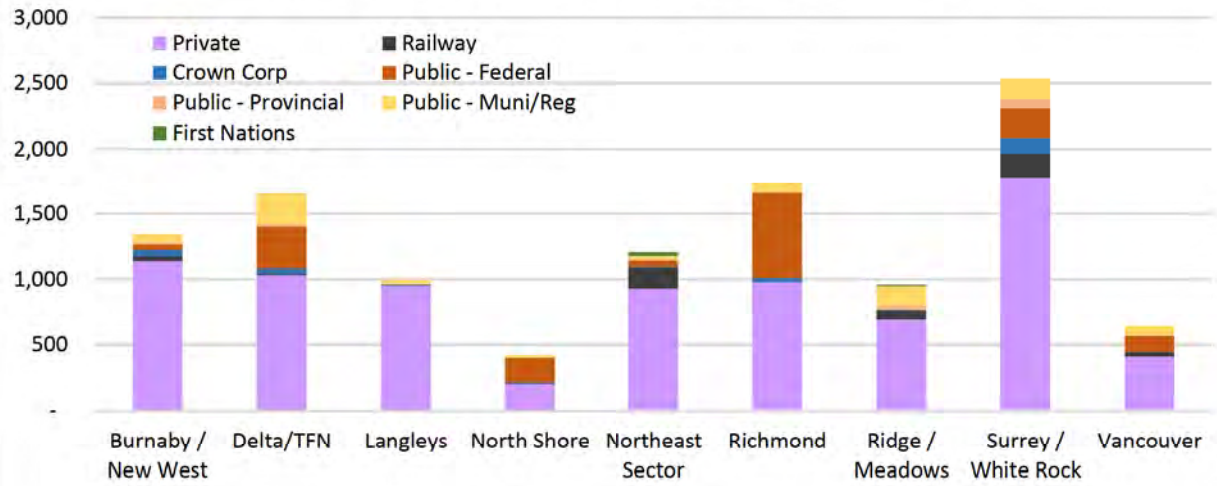
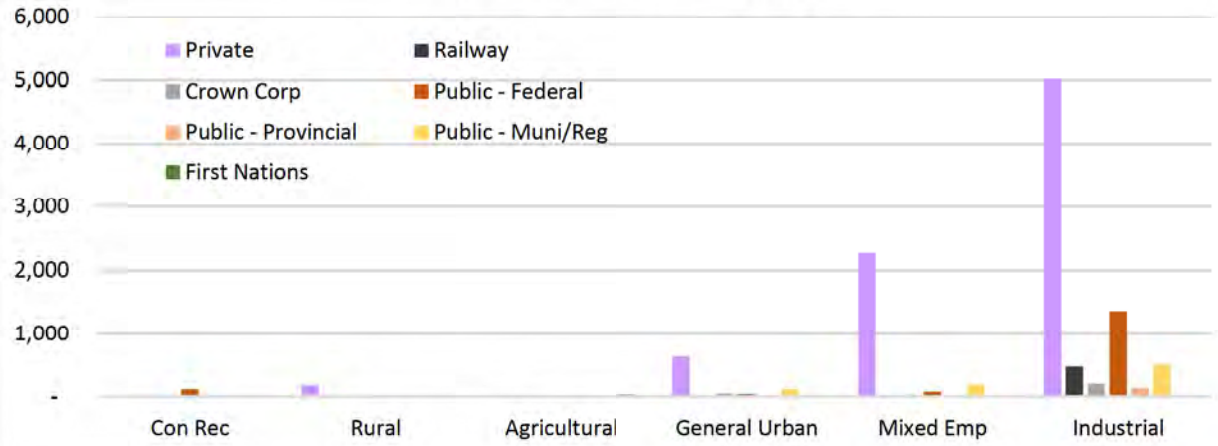


Table 4.14: Land Ownership Type by Consolidated Land Use Classification

Ownership Type	Building - Industrial	Land - Industrial	Large-Scale Infra / Transp	Transp Opts / Parking	Retail	Commercial	Other / Vacant	Total
Private	4,443	808	729	20	425	383	1,312	8,121
Railway	17	2	462				16	498
Crown Corp	29	13	198			7	22	269
Public - Federal	49	20	1,270		6	3	237	1,584
Public - Prov	8	20	2	12	0	2	115	159
Public - Local/Reg	93	110	178	58	8	12	374	832
First Nations							40	40
Total	**4,639**	**975**	**2,839**	**90**	**439**	**406**	**2,115**	**11,502**

The following figure shows the Inventory by land ownership type relative to regional designation. Virtually all federal and railway owned lands were regionally designated as 'Industrial' (noting that local government regulations do not apply to lands under federal jurisdiction), whereas a signification proportion of the privately owned lands were designated 'Mixed Employment' or 'General Urban'.

Figure 4.15: Land Ownership Type by Regional Designation (ha)



The following map shows the Inventory by land ownership type. Most of the Inventory was privately owned, shown in light pink. On the subsequent map, federal lands (such as the port and airport) are shown in dark pink, and private rail yards shown in green.

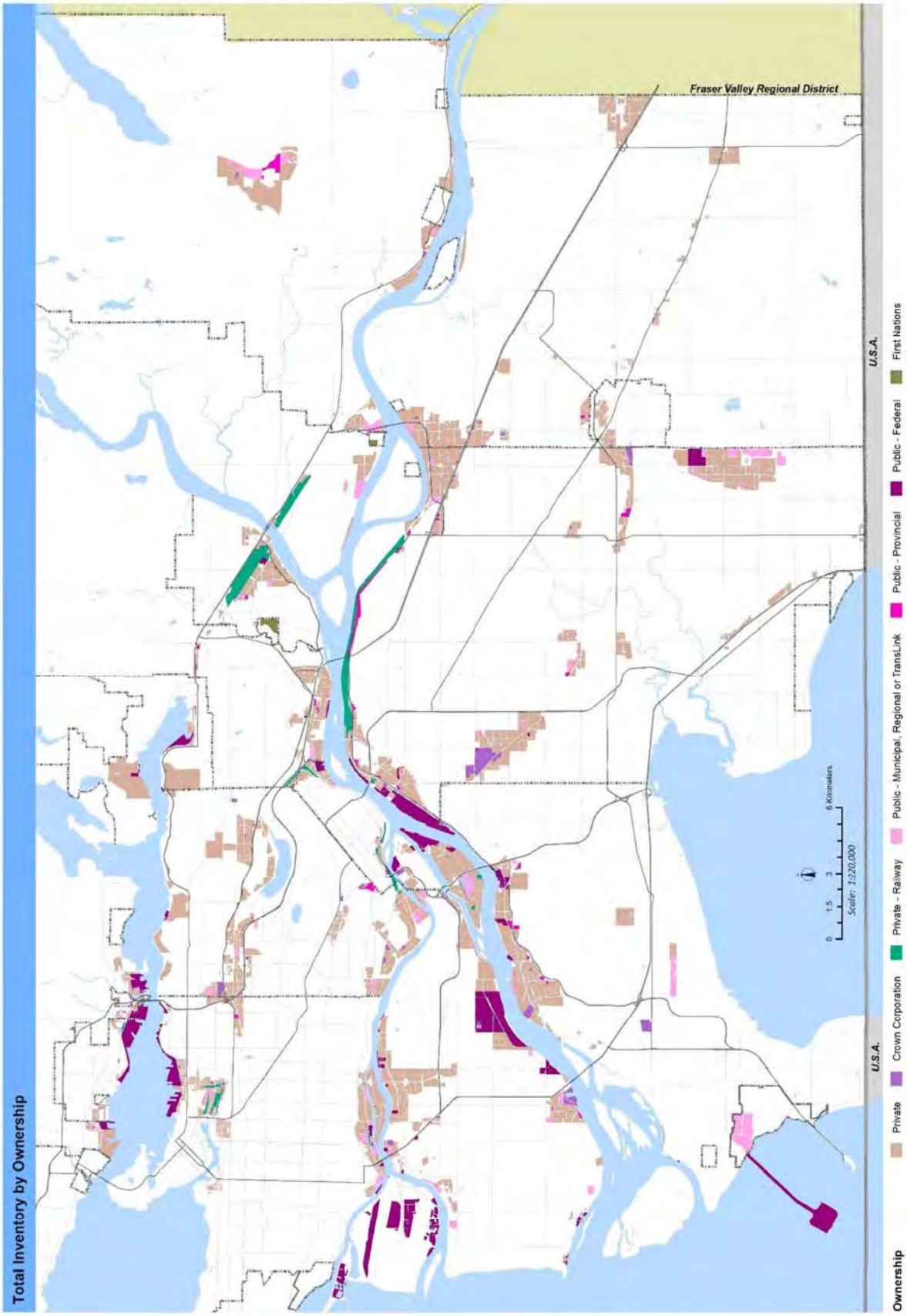
Details of the Inventory lands by ownership are shown in the following figure and maps, notably:

- 71% of the Inventory was privately owned;
- 14% was owned by the federal government (including various agencies such as port and airport);
- nearly all (97%) rail lands were 'Developed'; and
- most (84%) privately owned lands were 'Developed'.

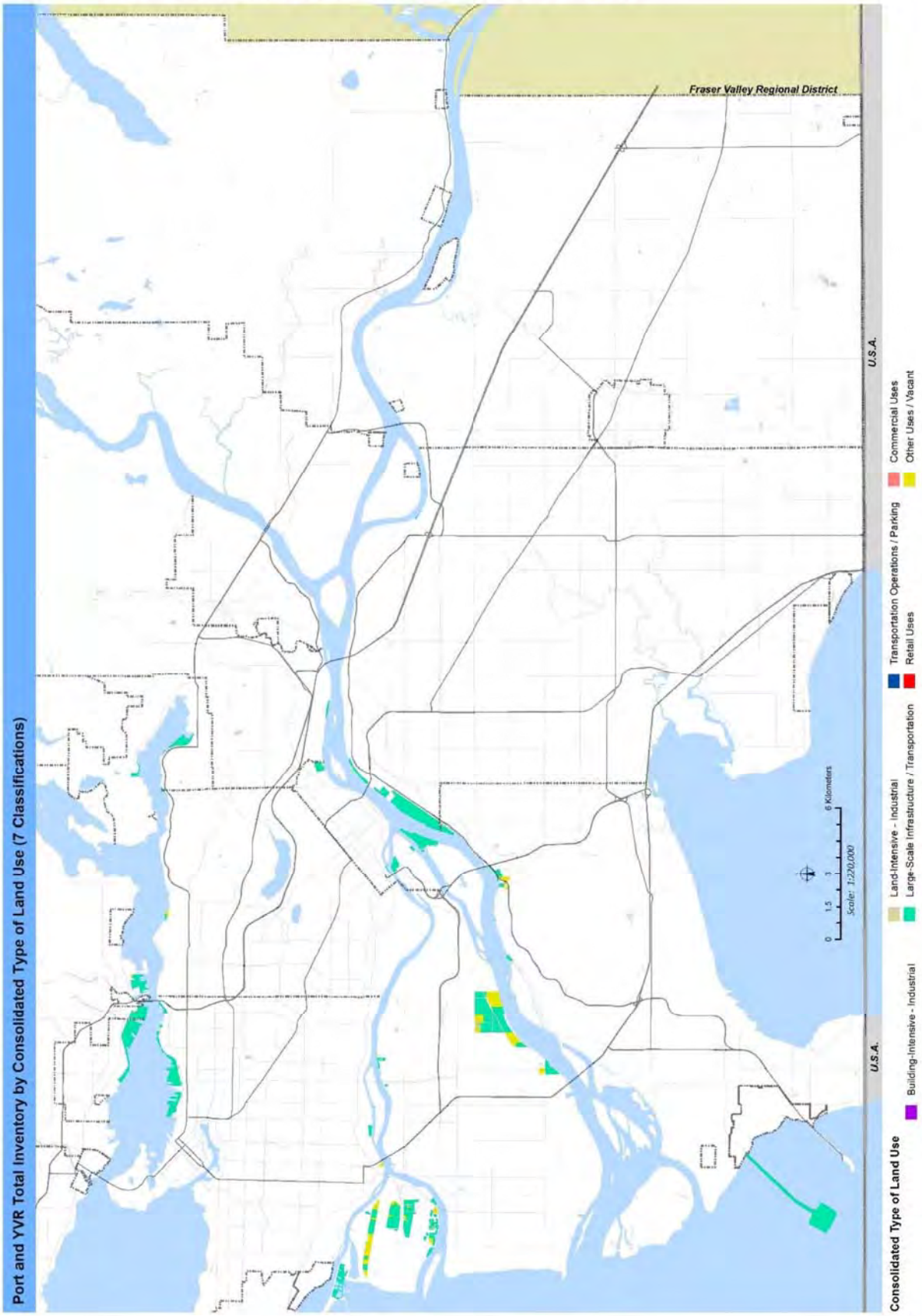
Table 4.15: Developed and Other/Vacant Lands by Land Ownership Type

Ownership Type	Developed	Vacant	Total	% of Total Lands
Private	6,808	1,312	8,121	71%
Railway	482	16	498	4%
Crown Corp	248	22	269	2%
Public - Federal	1,348	237	1,584	14%
Public - Prov	44	115	159	1%
Public - Local/Reg	458	374	832	7%
First Nations		40	40	0%
Total	**9,387**	**2,115**	**11,502**	**100%**

Map 4.6: Inventory by Land Ownership Type



Map 4.7: YVR and Port Lands by Consolidated Type of Land Use

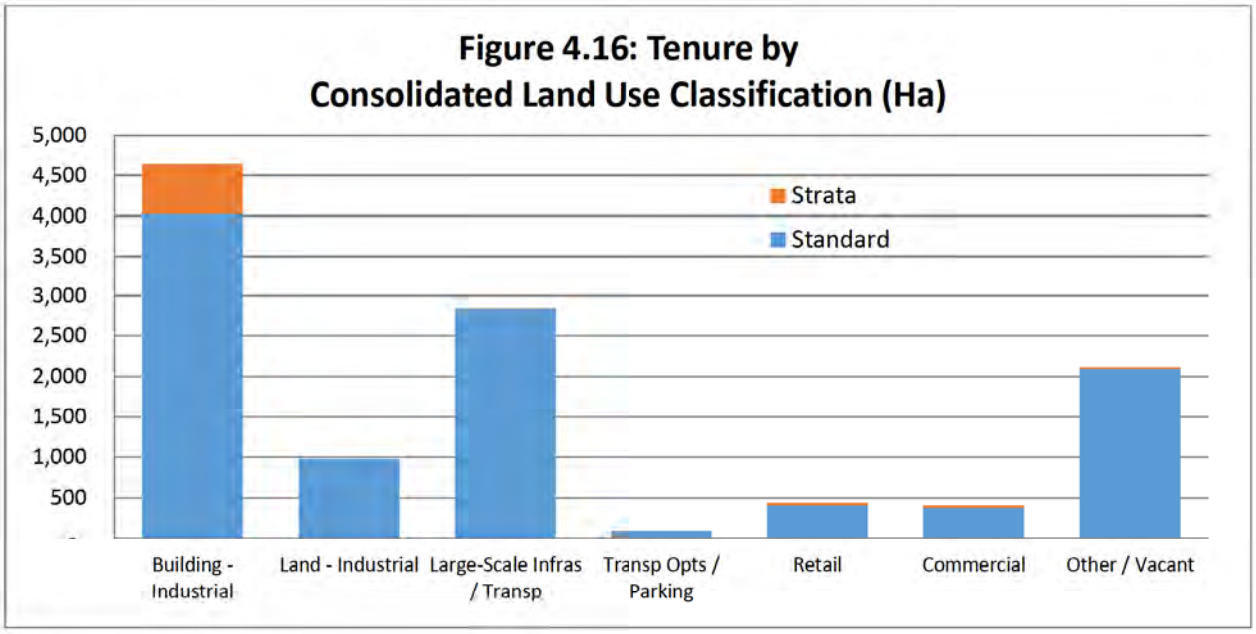


4.1.6 Land Tenure

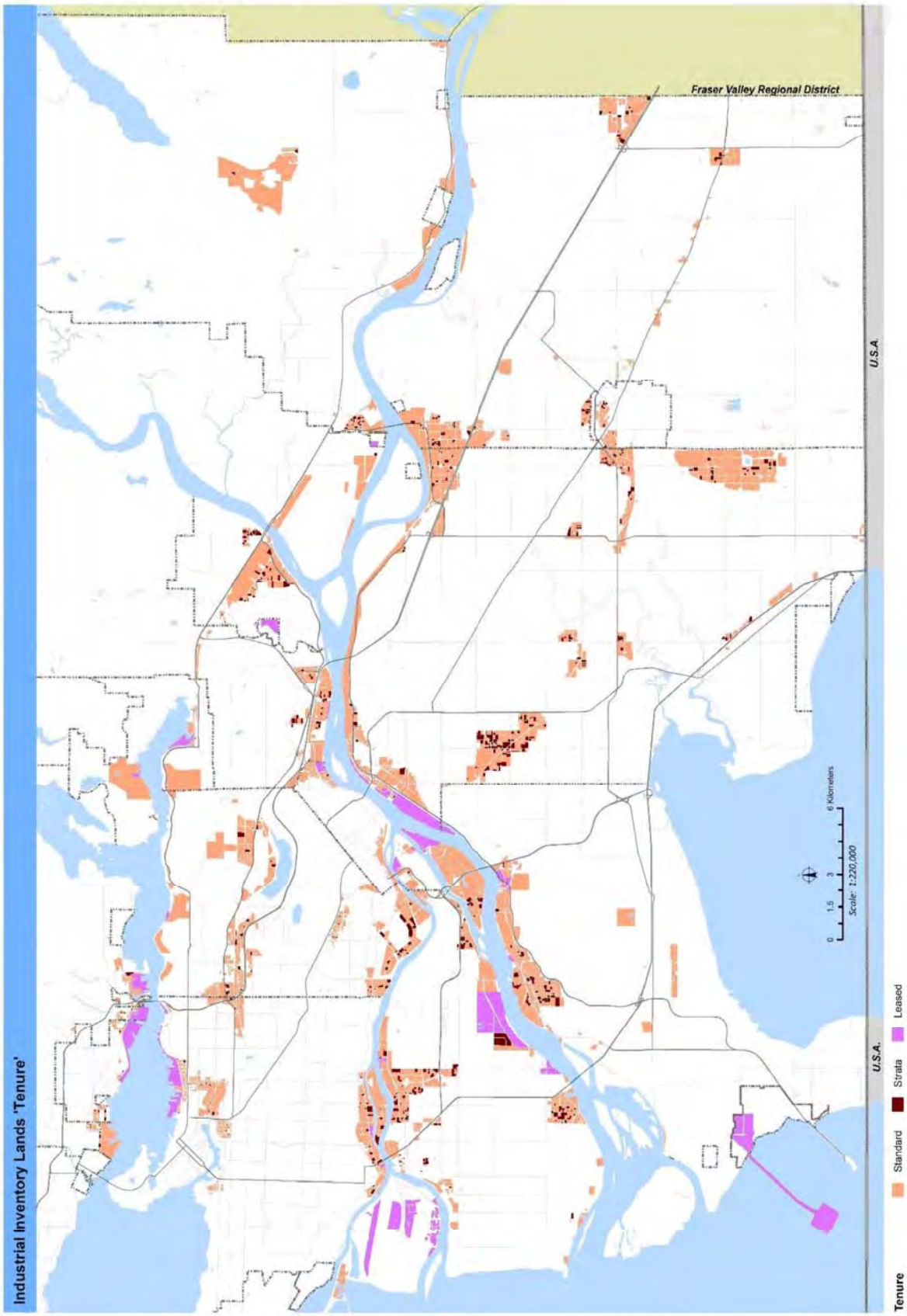
In terms of land tenure, 700 ha or 6% of the Inventory was strata tenure, with a higher rate of 10% for 'Mixed Employment' designated lands. The balance was 'standard' tenure, which includes both fee simple and lease lands. Multiple ownership of properties can impact future redevelopment potential of the sites. Details are shown in the following table, figure, and map.

Table 4.16: Land Tenure Type by Regional Designation

RGS Designation	Standard	Strata	Total
Con Rec	119		119
Rural	200	2	202
Agricultural	50		50
General Urban	848	32	880
Mixed Emp	2,302	267	2,569
Industrial	7,282	399	7,681
Total	**10,802**	**700**	**11,502**



Map 4.8: Inventory by Tenure



4.1.7 Site Sizes

Of the Inventory, 34% of the lands were within sites under 2 ha in size, and 22% within sites over 20 ha. The rest of the Inventory (44%) was within sites 2-20 ha in size. In some cases, abutting sites could be consolidated to create larger developable sites to accommodate larger industrial users. Details by site size category are shown in the following tables.

Table 4.17: Site Size Distribution of Inventory by Vacancy Percentage

Site Size	Developed	Vacant	Total	% of Total Lands	% of Lands Vacant
less than 1 HA	1,880	210	2,090	18%	10%
1 to 1.99 HA	1,574	225	1,798	16%	13%
2 to 4.99 HA	2,037	330	2,367	21%	14%
5 to 9.99 HA	1,146	380	1,525	13%	25%
10 to 19.99 HA	734	469	1,204	10%	39%
20 HA and over	2,016	501	2,517	22%	20%
Total	**9,387**	**2,115**	**11,502**	**100%**	**18%**

The Inventory of larger sites (both 'Developed' and 'Other / Vacant') over 20 ha (50 ac) was geographically distributed as follows:

- 24% in North East Sector
- 18% in Delta / Tsawwassen First Nation
- 16% in Surrey / White Rock
- 14% in Ridge / Meadows

Table 4.18: Site Size Distribution of Inventory by Sub-Region

Site Size	Burnaby / New West	Delta / TFN	Langleys	North Shore	Northeast Sector	Richmond	Ridge - Meadows	Surrey / White Rock	Vancouver	Total
less than 1 HA	291	192	251	73	154	301	81	510	235	2,090
1 to 1.99 HA	248	220	239	37	136	269	48	513	89	1,798
2 to 4.99 HA	329	364	307	45	150	403	109	551	109	2,367
5 to 9.99 HA	178	261	121	38	99	259	155	330	83	1,525
10 to 19.99 HA	81	162	78	42	70	290	222	221	37	1,204
20 HA and over	214	455		185	601	218	345	408	91	2,517
Total	**1,342**	**1,655**	**996**	**420**	**1,209**	**1,741**	**960**	**2,534**	**644**	**11,502**

Table 4.19: Site Size Distribution of Inventory by Consolidated Land Use Classification

Site Size	Building - Industrial	Land - Industrial	Large-Scale Infras / Transp	Transp Opts / Parking	Retail	Commercial	Other / Vacant	Total
less than 1 HA	1,348	159	72	12	157	132	210	2,090
1 to 1.99 HA	1,081	148	93	8	105	138	225	1,798
2 to 4.99 HA	1,306	284	228	14	111	94	330	2,367
5 to 9.99 HA	581	207	246	33	50	28	380	1,525
10 to 19.99 HA	228	175	279	23	16	14	469	1,204
20 HA and over	95		1,921				501	2,517
Total	**4,639**	**975**	**2,839**	**90**	**439**	**406**	**2,115**	**11,502**

Table 4.20: Site Size Distribution of Inventory by Regional Designation

Site Size	Con Rec	Rural	Agricultural	General Urban	Mixed Emp	Industrial	Total
less than 1 HA	3	20	5	252	636	1,174	2,090
1 to 1.99 HA	2	9		134	671	983	1,798
2 to 4.99 HA	2	32	5	210	661	1,458	2,367
5 to 9.99 HA		37	10	84	307	1,088	1,525
10 to 19.99 HA		70		66	200	868	1,204
20 HA and over	112	34	30	135	94	2,111	2,517
Total	**119**	**202**	**50**	**880**	**2,569**	**7,681**	**11,502**

Site size distribution also varies by regional designation and land use classification, as shown on the following figures. Larger sites tend to be regionally designated 'Industrial' (84%), and used for 'Large-Scale Infrastructure / Transportation' (76%) activities.

Figure 4.17: Site Size by Regional Designation (Ha)

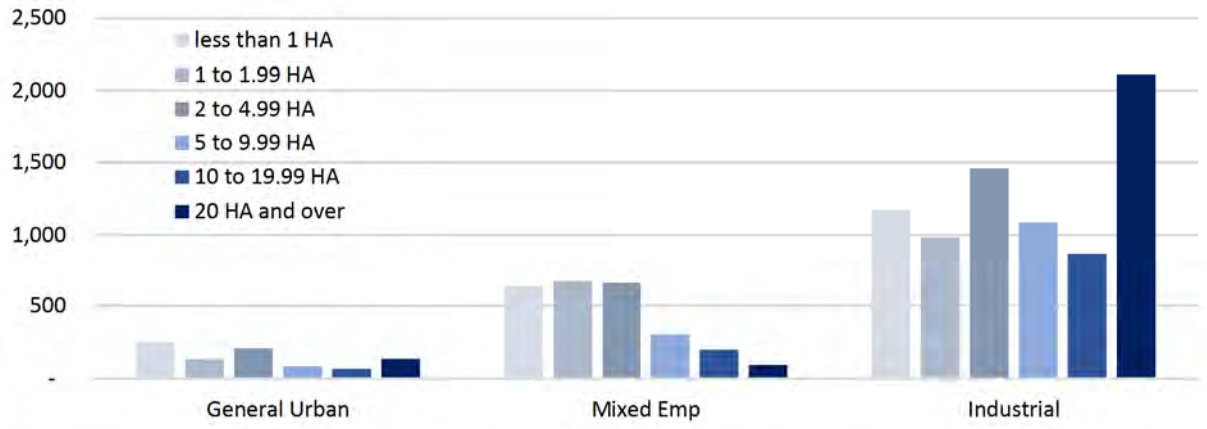
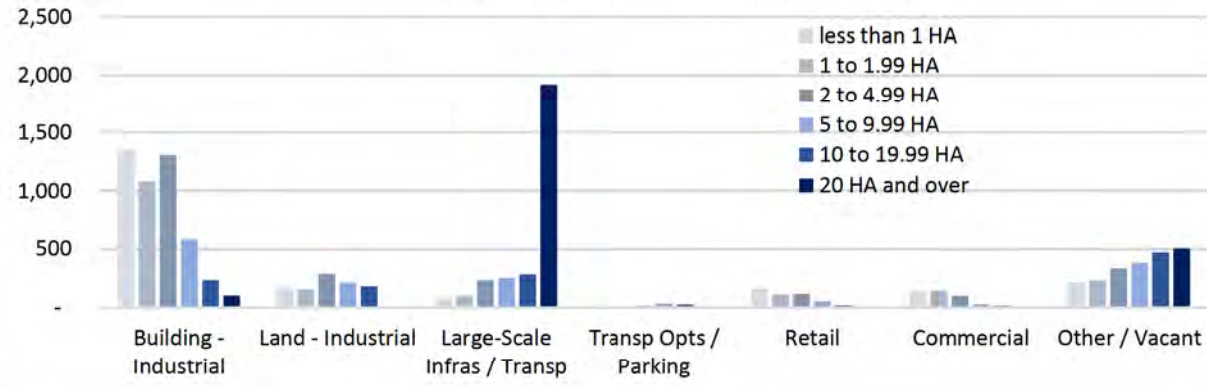


Figure 4.18: Site Size by Consolidated Land Use Classification (Ha)



The range in site sizes is also illustrated through the calculation of average site sizes. Average sizes (consolidated properties, where applicable) vary greatly by sub-region and by sector classification, as illustrated by these observations, supposed by the following tables:

- By geography, most sites range from 1.0 – 2.0 ha in size, with outliers:
  - 0.4 ha in Vancouver
  - 3.1 ha in Ridge-Meadows
- By consolidated land use classification, most sites range from 0.9 - 1.2 ha in size, with outliers:
  - 6.6 ha for 'Large-scale Infrastructure / Transportation' sector
  - 1.9 ha for 'Other / Vacant' sites

Table 4.21: Average Site Size by Sub-Region

Sub-Regions	# of Parcels	Area - HA	Avg Parcel Size - HA	% of Total Lands
Burnaby/New West	1317	1,342	1.0	12%
Delta/TFN	720	1,655	2.3	14%
Langleys	809	996	1.2	9%
North Shore	444	420	0.9	4%
Northeast Sector	582	1,209	2.1	11%
Richmond	1118	1,741	1.6	15%
Ridge/Meadows	306	960	3.1	8%
Surrey/White Rock	1823	2,534	1.4	22%
Vancouver	1450	644	0.4	6%
Total	**8569**	**11,502**	**1.3**	**100%**

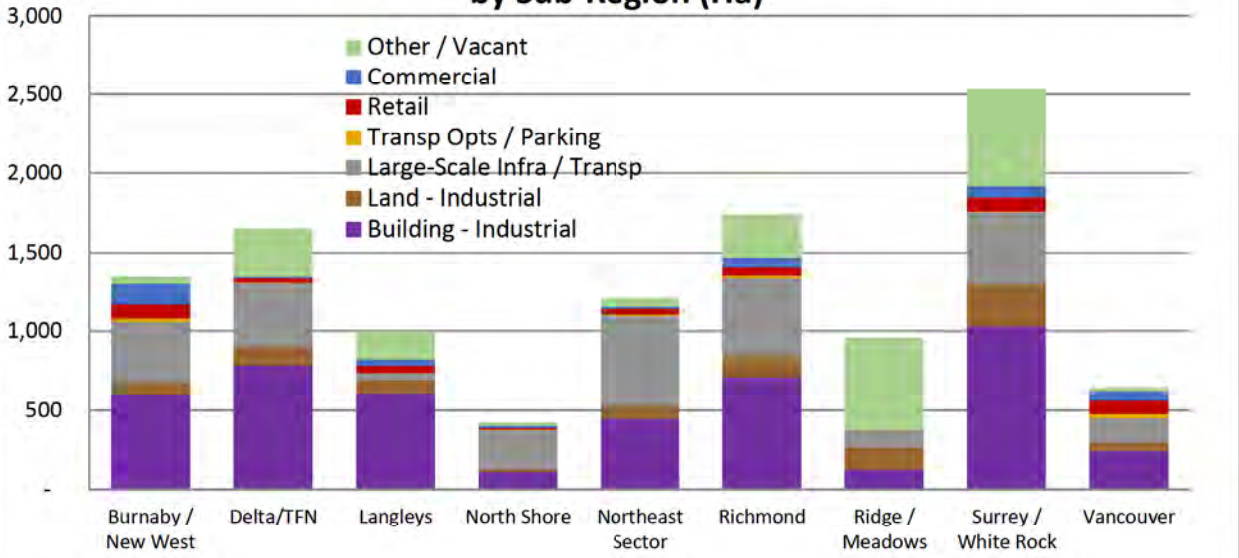
Table 4.22: Average Site Size by Consolidated Land Use Classification

Land Use Category	# of Parcels	Area - HA	Avg Parcel Size - HA	% of Total Lands
Building - Industrial	5122	4,639	0.9	40%
Land - Industrial	648	975	1.5	8%
Large-Scale Infras / Transp	429	2,839	6.6	25%
Transp Opts / Parking	63	90	1.4	1%
Retail	629	439	0.7	4%
Commercial	583	406	0.7	4%
Other / Vacant	1095	2,115	1.9	18%
Total	**8569**	**11,502**	**1.3**	**100%**

4.2 Findings at the Sub-Regional Level

This section provides information and commentary to characterize the nine geographic sub-regions, after the illustrative figure showing consolidated land use classifications by sub-region. The profile of industrial land uses varies significantly by sub-region, from some inner urban areas being largely built out with proportionally more 'General Industrial' uses, to other areas having more 'Large-Scale Infrastructure / Transportation' uses and 'Other / Vacant' lands.

Figure 4.19: Consolidated Land Use Classifications by Sub-Region (Ha)



The following are notable observations about the Inventory lands in each of the sub-regions.

Vancouver – 644 ha

- Mostly 'Developed' lands
- Many 'General Industrial' classified lands
- Significant port terminals
- Smallest average parcel size (0.4 ha)
- Highest proportion (99%) of lands in 'Industrial' or 'Mixed Employment' regional designation

Burnaby / New Westminster – 1,342 ha

- 391 ha of large scale industrial / transportation
- 260 ha 'Oil Tank Farms'
- 90 ha 'Office'
- Largest share (28%) of region's Transportation – Operations lands

North East Sector (Coquitlam, Port Coquitlam, Port Moody) – 1,209 ha

- 150 ha rail yards – in Port Coquitlam
- 369 ha 'Oil Tank Farms' – in Port Moody

Pitt Meadows / Maple Ridge – 960 ha

- 460 ha 'Vacant' land; much of which are located in north-east Maple Ridge
- Smallest share (4%) of region's developed lands
- Second largest share (28%) of region's vacant lands
- Largest average parcel size (3.1 ha)
- Lowest share (2%) of their Inventory is on strata lots
- Lowest proportion (71%) of lands in 'Industrial' or 'Mixed Employment' regional designation

North Shore (North Vancouver City, North Vancouver District) – 420 ha

- 166 ha port terminals
- Limited 'Vacant' land supply
- Smallest share (4%) of region's industrial lands
- Smallest share (1%) of region's vacant lands

Richmond (including YVR Sea Island) – 1,741 ha

- Includes lands at YVR International Airport
- Includes notable retail sites within industrial areas
- 271 ha 'Other / Vacant' (97 ha vacant port lands; 62 ha vacant YVR airside / groundside lands, and 66 ha as vacant lands)
- Largest share (9%) of their Inventory is on strata lots

Delta / Tsawwassen First Nation – 1,655

- Many industrial lands on Annacis Island and River Road area / corridor
- Roberts Bank Terminal is a significant part of Inventory (282 ha) as 'Developed Port Terminal'
- 313 ha 'Other / Vacant'; 66 ha peat extraction site in central Delta
- Largest share (28%) of region's Distribution / Warehouse lands
- Largest share (20%) of region's Manufacturing / Production lands
- Largest share (26%) of region's developed Port lands

Surrey – 2,534 ha

- Surrey has the largest amount of industrial lands in the region
- Major industrial areas include: Newton (including BC Hydro electrical sub-station lands), South Westminster, Port Kells, Campbell Heights
- 616 'Other / Vacant' (365 ha vacant land; 135 ha 'Agriculture'; 102 ha 'Residential')
- Largest share (20%) of region's developed lands
- Largest share (29%) of region's vacant lands
- Largest share (38%) of region's Outdoor Storage lands

Langleys (City and Township) – 996 ha

- Port Kells area mostly 'Developed'
- Gloucester Estates mostly 'Developed' as 'General Industrial'
- Smaller industrial sites along Fraser Highway
- Second largest share (20%) of region's Distribution / Warehouse lands

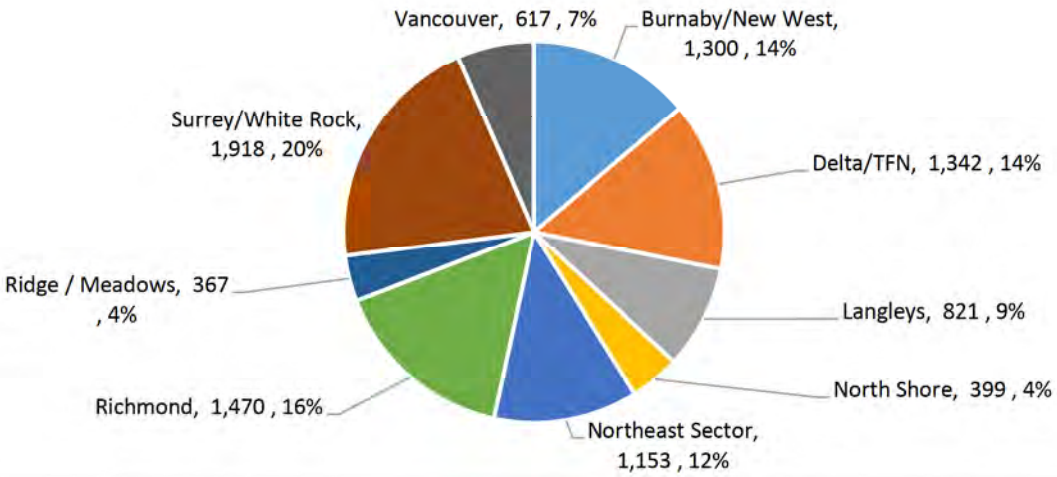
4.3 'Developed' Inventory

This section documents the 'Developed' lands, which comprise 82% of the Inventory or 9,387 ha.

4.3.1 Geographic Sub-Regions

Of the 'Developed' lands, much are located in Surrey (20%), followed by Richmond (16%), as shown in the figure.

Figure 4.20: Distribution of Developed Lands by Sub-Region (Ha)



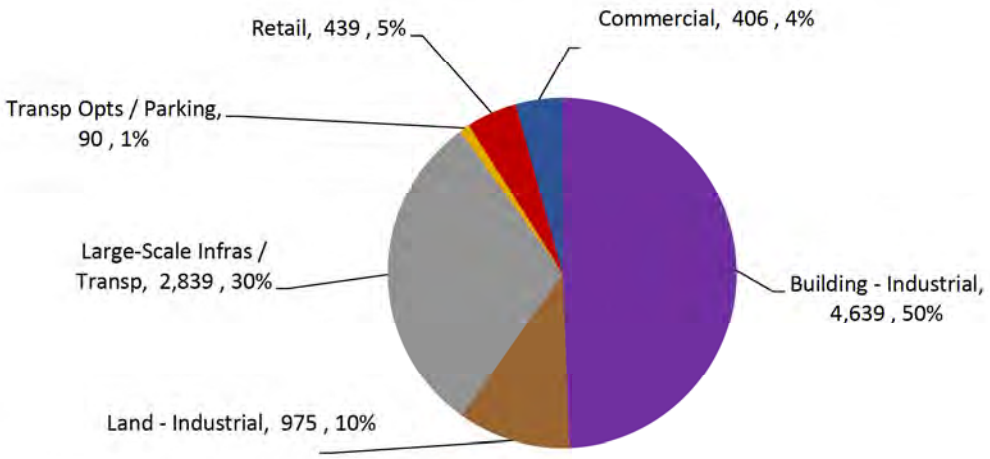
4.3.2 Land Use Classifications

Of the 'Developed' Inventory, the largest two land use classifications were: 40% 'Building Intensive Industrial' and 25% 'Large-Scale Infrastructure / Transportation', with more information in the following table and figure. The other land use classifications make up a relatively small part of the Inventory. The following table and figure provide this information as well as the classification by sub-region.

Table 4.23: Inventory by Sub-Region and Consolidated Land Use Classification

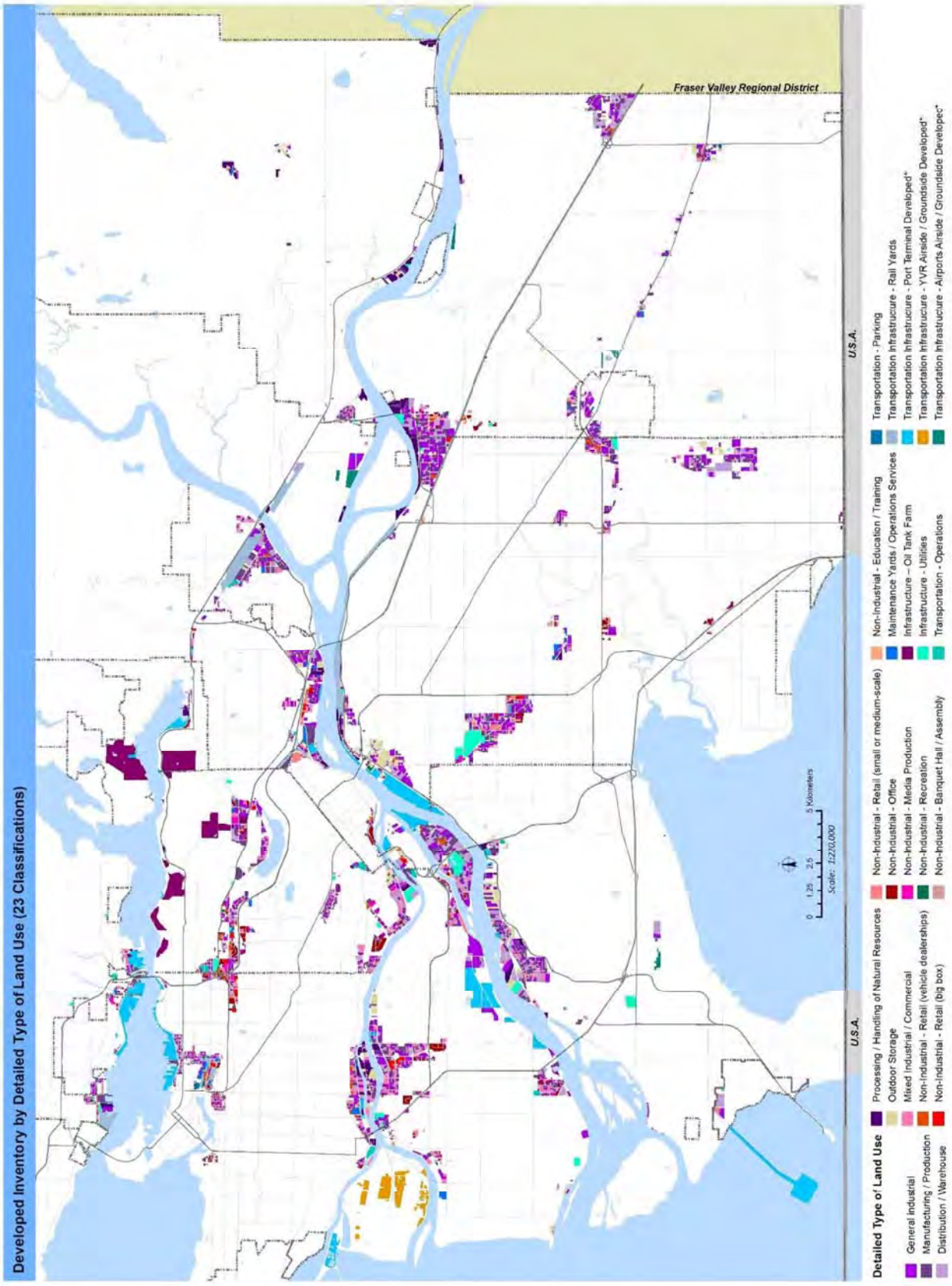
Sub-Regions	Building - Industrial	Land - Industrial	Large-Scale Infra / Transp	Transp Opts / Parking	Retail	Commercial	Other / Vacant	Total - HA	% of Total
Burnaby/NewWest	597	78	380	23	89	133	42	1,342	12%
Delta/TFN	783	120	397	5	29	8	313	1,655	14%
Langleys	605	85	44		46	40	176	996	9%
North Shore	110	16	244	5	10	14	21	420	4%
Northeast Sector	445	82	565	9	39	12	56	1,209	11%
Richmond	707	136	490	17	53	68	271	1,741	15%
Ridge/Meadows	124	138	101		3	1	593	960	8%
Surrey/WhiteRock	1,029	264	462	5	84	74	616	2,534	22%
Vancouver	239	55	155	26	85	57	27	644	6%
Total	**4,639**	**975**	**2,839**	**90**	**439**	**406**	**2,115**	**11,502**	**100%**
% of Total	40%	8%	25%	1%	4%	4%	18%	100%	

Figure 4.21: Developed Inventory by Consolidated Land Use Classification (Ha)

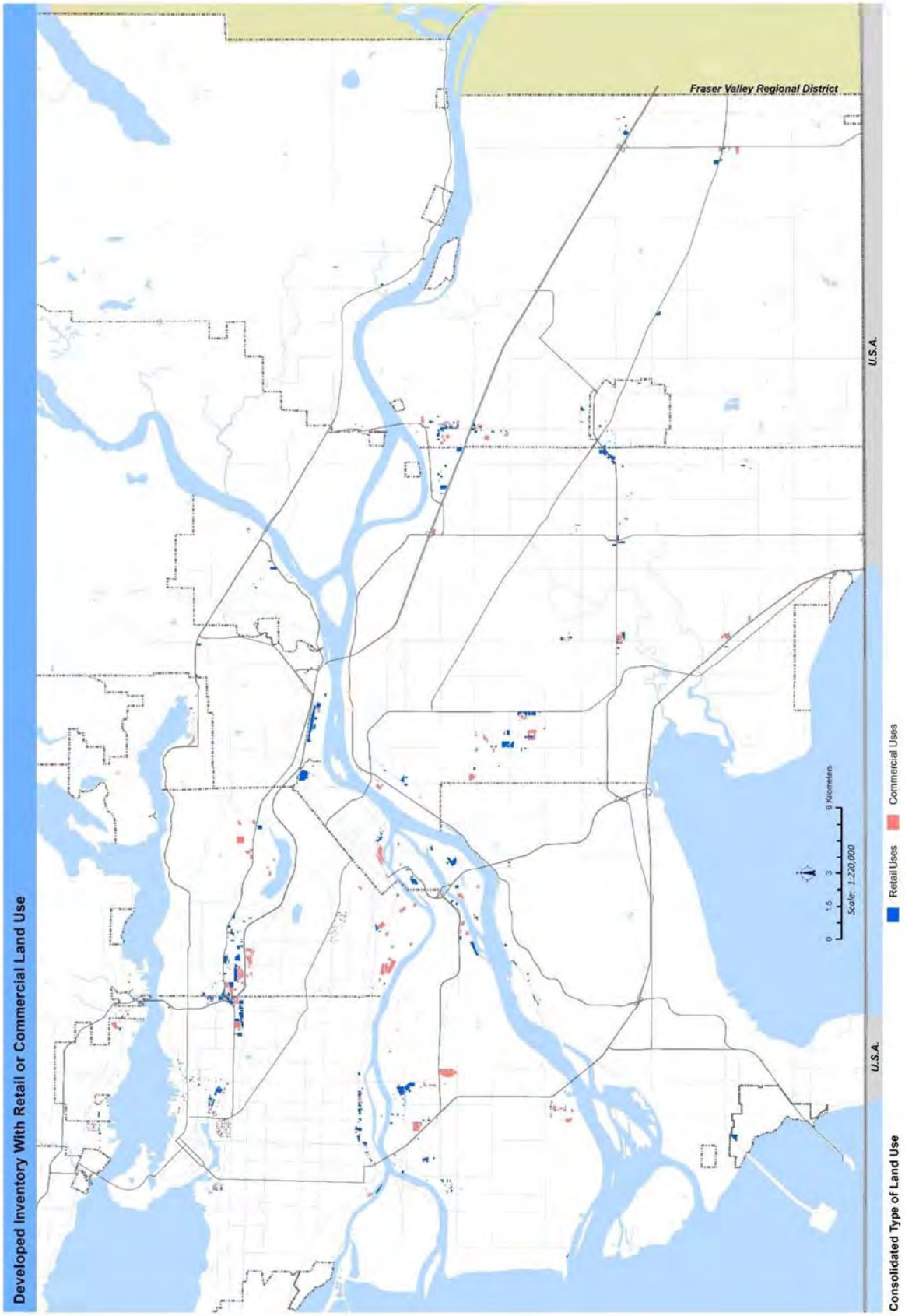


The following map shows the 'Developed' lands by detailed land use classification. Much of the Inventory was 'General Industrial', shown as dark purple, as well as large infrastructure / utility sites and port terminals. The subsequent map shows 'Commercial' and 'Retail' uses occurring on industrial lands.

Map 4.9: Developed Inventory by Detailed Type of Land Use (18 Classifications)



Map 4.10: Inventory with Retail or Office Land Use



4.3.3 Site Size

The following tables and figure analyze 'Developed' and 'Other / Vacant' lands by site size. There were many sites (comprising 20% of 'Developed' and 10% of 'Other / Vacant') between 0 and 2.0 ha in size, and also a significant amount (21% and 24% respectively) comprising sites over 20 ha in size. By sector, the larger (20 ha and over) sites were mostly in the 'Large-Scale Infrastructure / Transportation' land use classification.

Table 4.24: Distribution Size of Sites by Percentage of Lands

Site Size	Developed	% of Total Lands	Vacant	% of Total Lands
less than 1 HA	1,880	20%	210	10%
1 to 1.99 HA	1,574	17%	225	11%
2 to 4.99 HA	2,037	22%	330	16%
5 to 9.99 HA	1,146	12%	380	18%
10 to 19.99 HA	734	8%	469	22%
20 HA and over	2,016	21%	501	24%
Total	**9,387**	**100%**	**2,115**	**100%**

Figure 4.22: Site Size by Consolidated Land Use Classification (Ha)

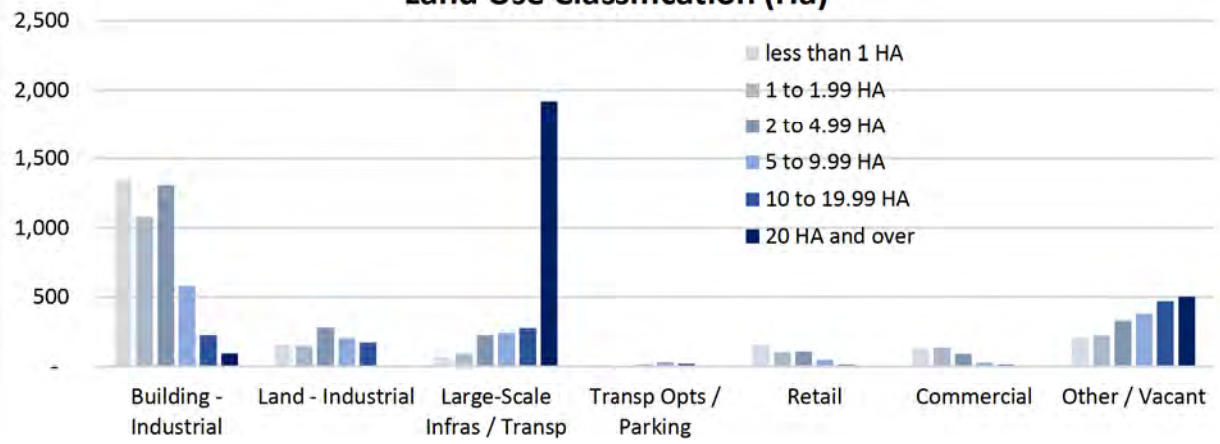


Table 4.25: Site Size Distribution of Lands by Consolidated Land Use Classification

Site Size	Building - Industrial	Land - Industrial	Large-Scale Infras / Transp	Transp Opts / Parking	Retail	Commercial	Other / Vacant	Total
less than 1 HA	1,348	159	72	12	157	132	210	2,090
1 to 1.99 HA	1,081	148	93	8	105	138	225	1,798
2 to 4.99 HA	1,306	284	228	14	111	94	330	2,367
5 to 9.99 HA	581	207	246	33	50	28	380	1,525
10 to 19.99 HA	228	175	279	23	16	14	469	1,204
20 HA and over	95		1,921				501	2,517
Total	**4,639**	**975**	**2,839**	**90**	**439**	**406**	**2,115**	**11,502**

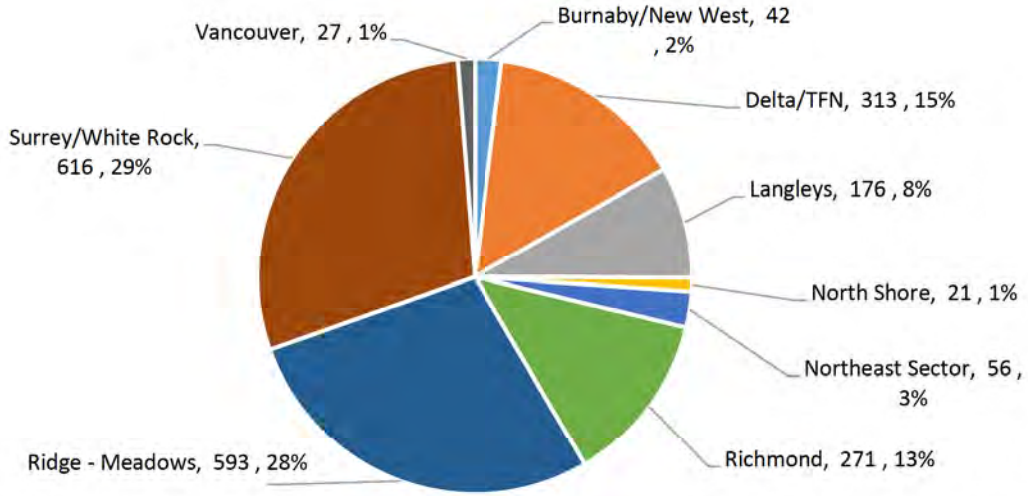
4.4 'Other / Vacant' Inventory

This section documents the Inventory's 'Other / Vacant' lands, which comprise 18% of the Inventory or 2,115 ha. The 'Other / Vacant' category includes lands that are completely vacant, as well as those that have non-industrial uses with the potential to redevelop to industrial uses.

4.4.1 Geographic Sub-Regions

By sub-region, for the 'Other / Vacant' Inventory, 29% was located in Surrey, 28% in Ridge / Meadows, 15% in Delta / Tsawwassen First Nation, and 13% in Richmond, as seen in the figure.

Figure 4.23: Other/Vacant Lands Distribution by Sub-Region (Ha)



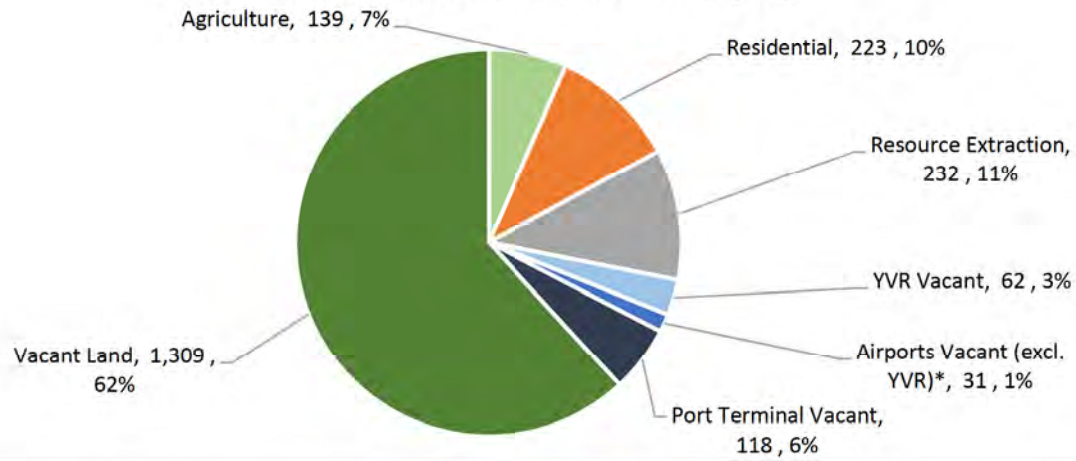
Specific notable major 'Other / Vacant' lands include:

- Tsawwassen First Nation lands that abut the Roberts Bank Terminal and that are accessible by the South Fraser Perimeter Road (SFPR);
- Campbell Heights in south-east Surrey;
- North-east Maple Ridge, which is located far from transportation infrastructure; and
- Some smaller sites in Richmond, Delta, Surrey, Langley, and Pitt Meadows.

4.4.2 Land Use Classification

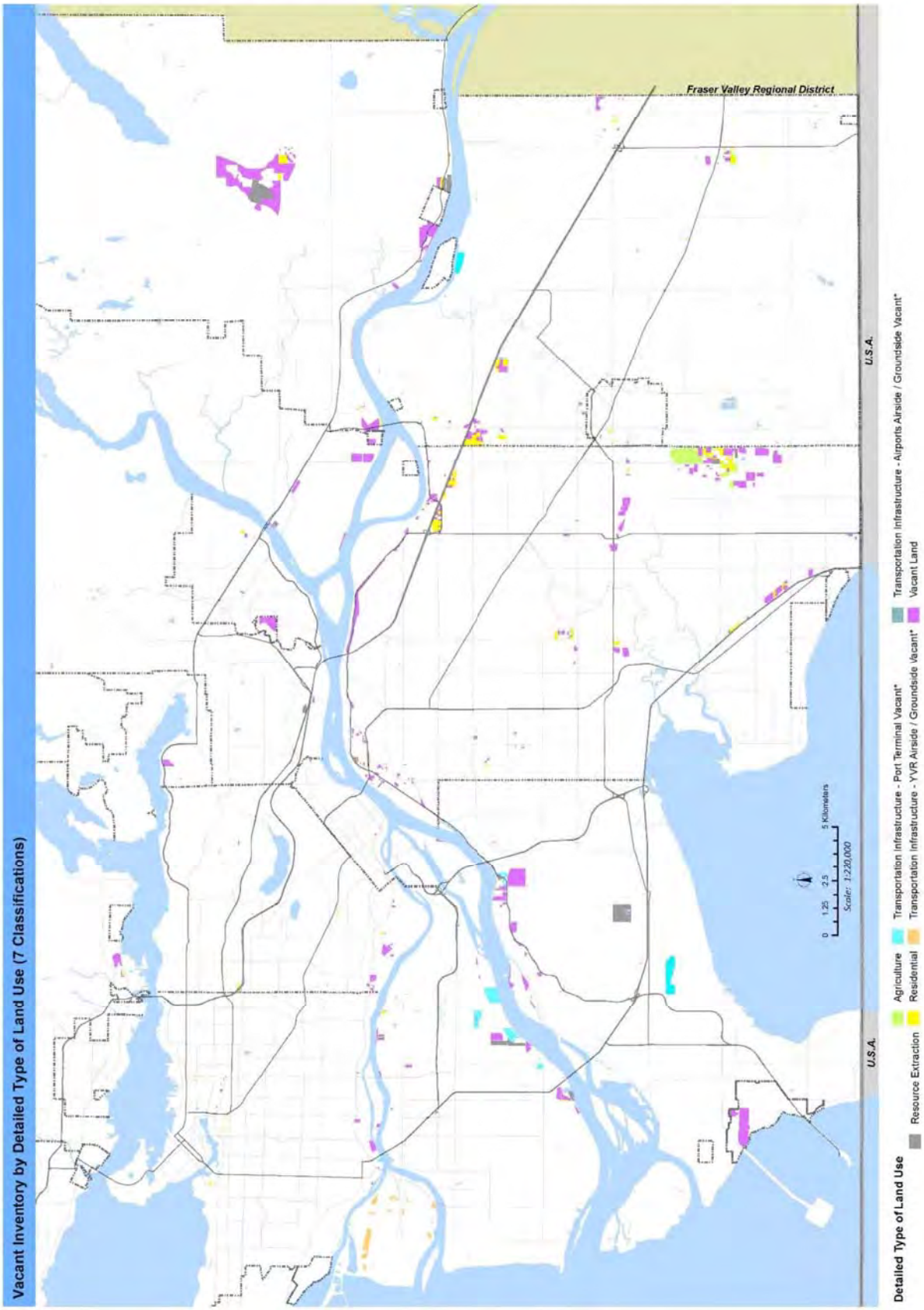
'Other / Vacant' lands comprise six land use categories: 62% were completely vacant, 11% 'Resource Extraction' 10% 'Residential', and 7% 'Agriculture', as seen in the figure. These lands offer future opportunities for industrial development.

Figure 4.24: Other/Vacant Lands by Detailed Land Use Classification (Ha)



The following map shows the 'Other / Vacant' lands, by the six categories of uses. The lands were distributed throughout the region, with large resource extraction sites in Richmond, Delta, and Maple Ridge, and numerous residential uses in Surrey and Langley Township.

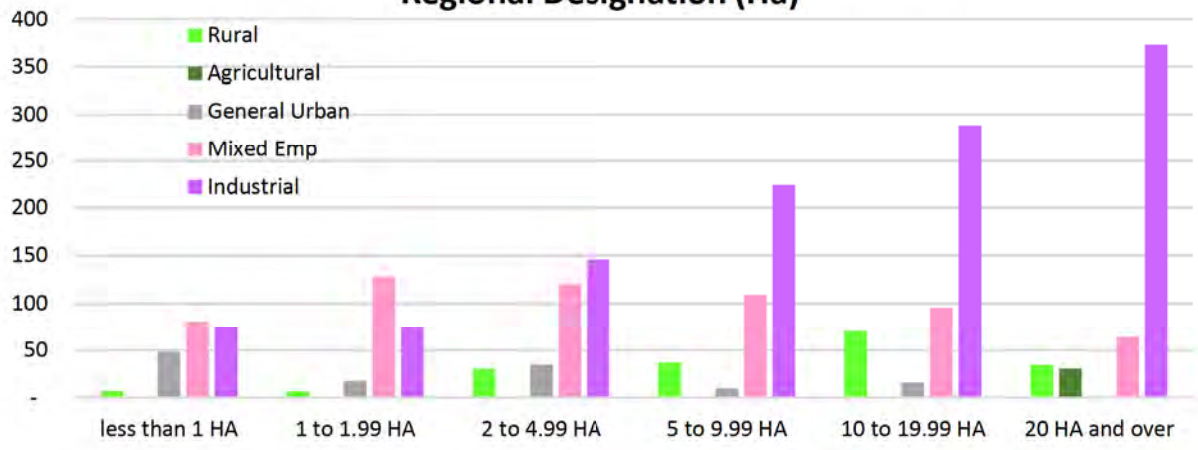
Map 4.11: Other/Vacant Inventory by Detailed Type of Land Use (6 Classifications)



4.4.3 Site Size

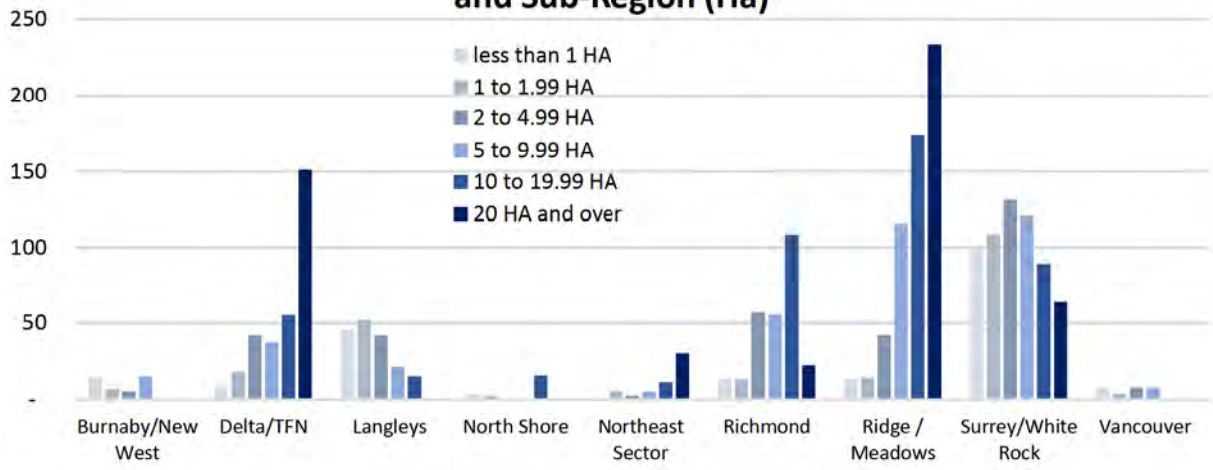
For the 'Other / Vacant' lands (2,115 ha), the following figure shows the site size distribution by regional designation. Larger sites tend to be regionally designated 'Industrial', whereas many mid-sized sites were 'Mixed Employment', and smaller sites had a higher proportion of 'General Urban' designation.

Figure 4.25: Other/Vacant Lands by Site Size and Regional Designation (Ha)



The following figure shows the distribution of 'Other / Vacant' lands by sub-region by site size. Most of the larger 'Other / Vacant' industrial sites were located in Surrey, Richmond, Delta / Tsawwassen First Nation, and Ridge / Meadows.

Figure 4.26: Other/Vacant Lands by Site Size and Sub-Region (Ha)

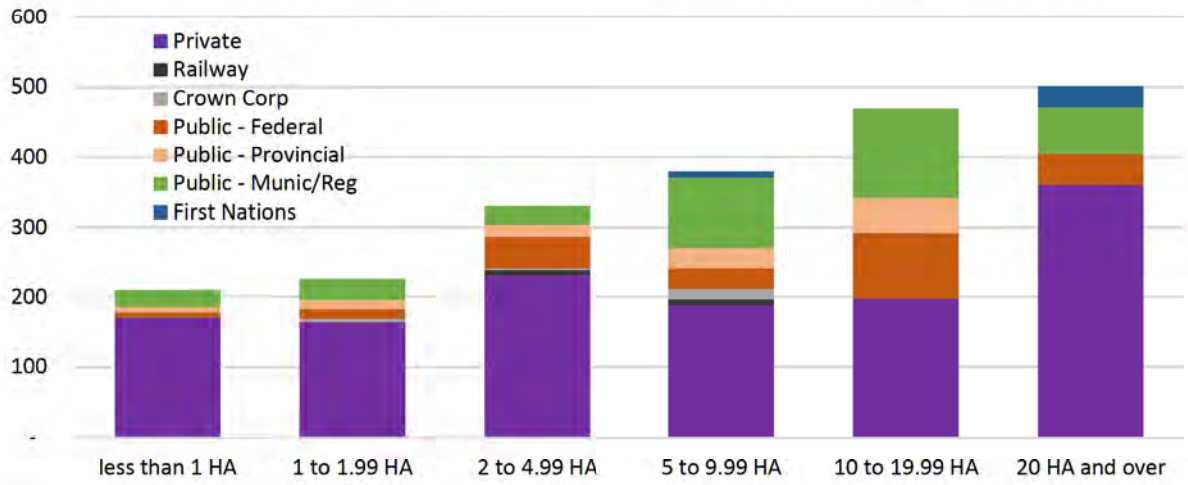


4.4.4 Land Ownership Type

In most size categories, the majority of lands were privately owned, however for the 8.0 to 20.0 ha size range, there were more municipal / regional government and federal government owned lands,

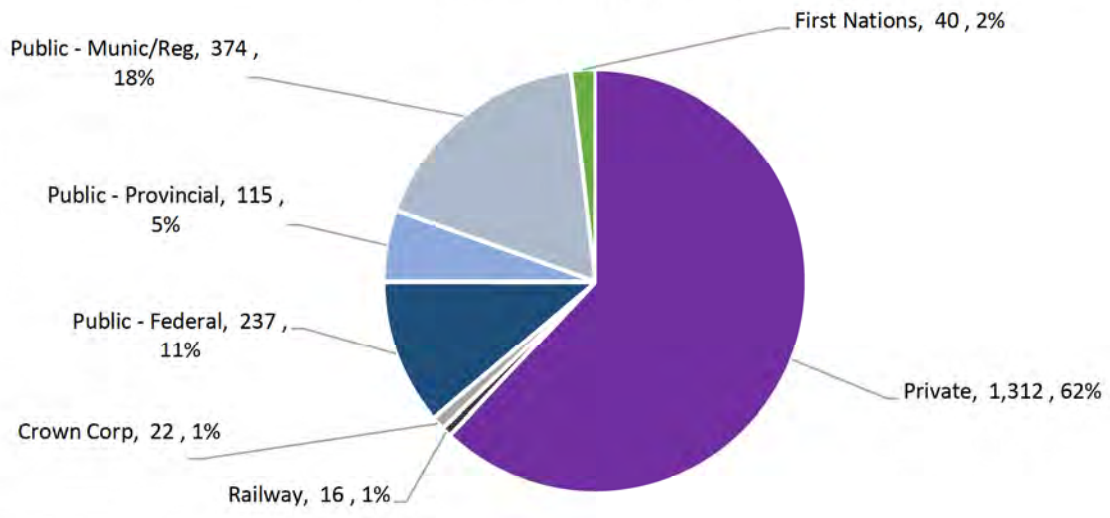
as illustrated in the figure. Particularly, of the 1,312 ha of 'Other / Vacant' privately owned lands, 360 ha (27%) were large sites (20+ ha).

Figure 4.27: Other/Vacant Lands by Land Ownership Type (Ha)

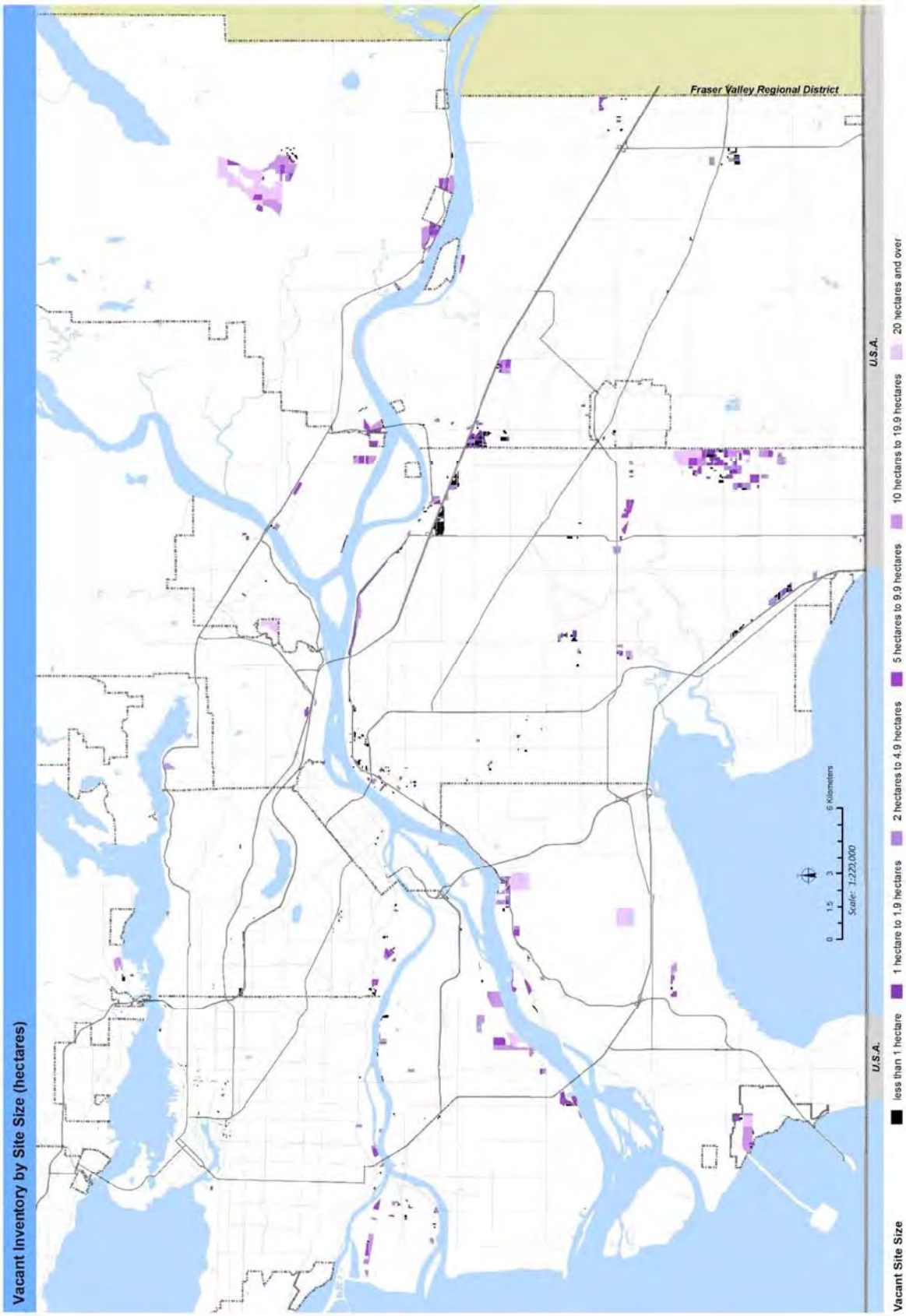


In terms of 'Other / Vacant' lands, 62% were privately owned, 11% owned by the federal government, 5% by the provincial government, and 18% by municipal / regional governments, as illustrated in the following figure and map.

Figure 4.28: Distribution of Other/Vacant Lands by Ownership Type (Ha)



Map 4.12: Other/Vacant Inventory by Site Size Range



4.4.5 Detailed Vacant Inventory Analysis

The 'Other / Vacant Lands' total 2,115 ha, distributed over seven different categories. Three of the categories (totalling 212 ha) are unique in that they are associated with airports and the Port, which have different jurisdictions, tenures, and user needs. There are also lands within the Inventory used for Agriculture (139 ha), Residential (223 ha), and Resource Extraction (232 ha) that are designated for industrial uses and generally expected to convert to such cover time.

This subset of the Inventory is detailed in the following tables, with notable observations:

- 56% were regionally designated 'Industrial', and 28% were designated 'Mixed Employment'.
- 29% of the 'Other / Vacant' land were in Surrey and 25% in Maple Ridge.
- Nearly all of the lands associated with port and airport were owned by the federal government.
- Of the 1,309 ha of 'Other / Vacant Land', 60% (791 ha) were privately owned.

Table 4.26: Other/Vacant Lands by Regional Designation and Detailed Land Use Classification

	Rural	Agricultural	General Urban	Mixed Emp	Industrial	Total
Agriculture				133	6	139
Residential	19		42	115	47	223
Resource Extraction	9		5	18	200	232
YVR Airside / Groundside Vacant					62	62
Airports Vacant (excluding YVR)				21	10	31
Port Terminal Vacant			8		109	118
Vacant Land	154	31	69	310	744	1,309
Total	**183**	**31**	**125**	**597**	**1,179**	**2,115**

Table 4.27: Other/Vacant Lands by Municipality and Detailed Land Use Classification

Row Labels	Agriculture	Residential	Resource Extraction	YVR Airside / Groundside Vacant	Airports Vacant (excl. YVR)	Port Terminal Vacant	Vacant Land	Total
Burnaby	0	5				3	31	39
Coquitlam		0	5				3	8
Delta		1	66		21	12	127	228
Langley City		3					1	3
Langley Township	4	71			10		87	172
Maple Ridge		27	102				398	527
New Westminster		0				1	2	3
North Vancouver District		1	1			1	18	21
Pitt Meadows			4				62	66
Port Coquitlam		2					34	36
Port Moody		0					11	11
Richmond		4	41	62		97	66	271
Surrey	135	102	13			1	365	616
Tsawwassen First Nations							84	84
Vancouver		6				3	18	27
Total	**139**	**223**	**232**	**62**	**31**	**118**	**1,309**	**2,115**

Table 4.28: Other/Vacant Lands by Detailed Land Use Classification and Ownership Type

	Private	Private - Railway	Crown Corp	Public - Federal	Public - Prov	Public - Muni/Reg	First Nations	Total
Agriculture	86			53				139
Residential	206				1	16		223
Resource Extraction	219	4	8		1			232
YVR Airside / Groundside Vacant				62				62
Airports Vacant (excluding YVR)	10					21		31
Port Terminal Vacant				118				118
Vacant Land	791	12	14	3	113	337	40	1,309
Total	**1,312**	**16**	**22**	**237**	**115**	**374**	**40**	**2,115**

5 Inventory Change Over Time

The Metro Vancouver 2020 Regional Industrial Lands Inventory was prepared to allow for comparison with past Inventories (namely the revised 2015 Inventory). Although using a consistent methodology, it is important to note that the Inventories use various data sources as well as in some cases professional judgment to estimate the Inventory as of a specific point in time. As the 2010 and 2005 Inventories used a different methodology than the 2015 (revised) and 2020 Inventories, comparing the more recent Inventories with older Inventories is not advised.

The work associated with the 2020 Inventory included some adjustments to the 2015 Inventory. Accordingly, the revised 2015 Inventory numbers included within this report have been adjusted from the previously published report to reflect the application of the edits to the methodology, and are thus more comparable with the 2020 Inventory results (see Appendix 10 for greater details).

5.1 Components of Change

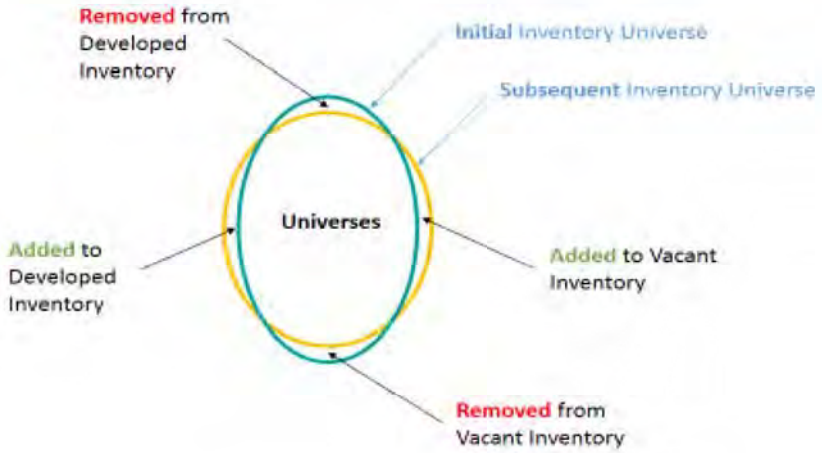
There are two sets of 'moving parts' associated with comparing multiple Inventories:

- Changes in total Inventory area ('Lands Added' and 'Lands Removed') between the periods; and
- Lands that became 'Developed' (i.e. absorbed) or became 'Vacant' between the periods.

In terms of net changes, there are both gross additions to the Inventory and gross removals. While 97% of the Inventory remained unchanged between 2015 and 2020, lands were added in some areas, and lands were removed in other areas.

The following figure conceptually illustrate that most of the 'universe' or scope of lands included in the Inventory remained constant between the 2015 and 2020 Inventories, however there were some changes. Some lands were added to, and some lands were removed from, the preceding 2015 Inventory. These land additions and removals included both 'Developed' and 'Other / Vacant' lands.

Figure 5.1: Conceptual Illustration of Changes in the Inventory Universes



In terms of changes in Inventory composition ('Developed' and 'Other / Vacant' status – as defined elsewhere in this report) between periods, the following figures conceptually illustrate that most lands retained their earlier classification, with some properties converting between developed or vacant classifications, and some properties were added or removed from the Inventory.

Figure 5.2: Conceptual Illustration of Changes in Inventory Developed and Vacant Areas

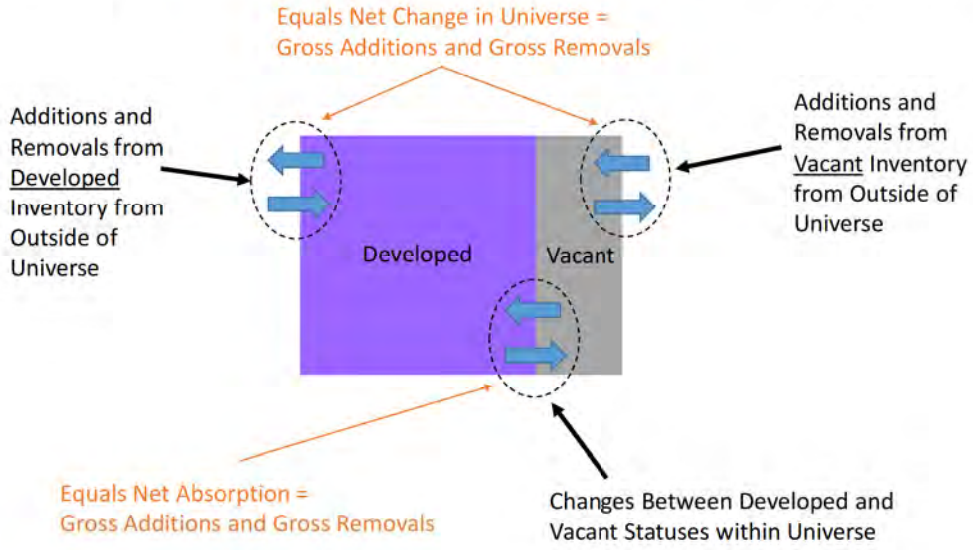
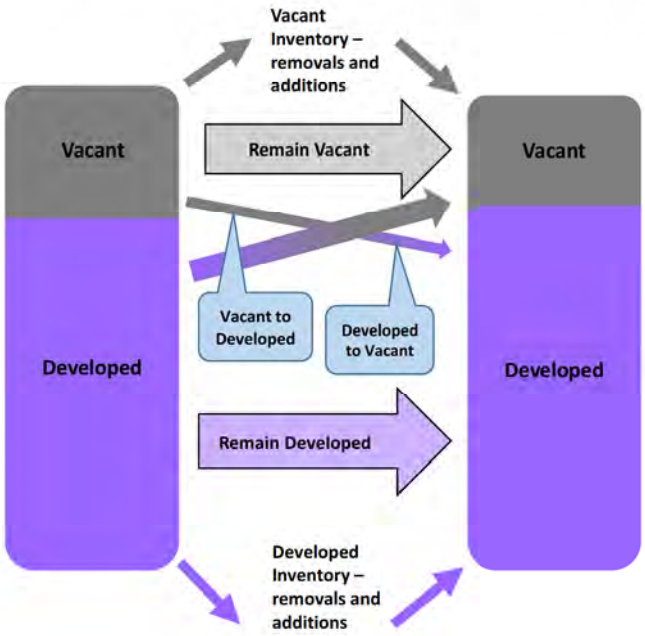


Figure 5.3: Conceptual Illustration of Changes in Inventory Composition



5.2 Revised 2015 Inventory

Along with preparation of the detailed 2020 Inventory, some refinements were made to the 2015 Inventory to maintain consistency and allow for comparison between the 2015 (revised) and 2020 results (but no changes were made to the 2010 and 2005 Inventories). The revised 2015 Inventory results reflect adjustments made to the original published Inventory that account for and neutralize varying municipal staff interpretation in comparison to the 2020 Inventory. All numbers in this report reflect the revised 2015 Inventory.

5.3 Geographic Areas of Change from 2015 to 2020

Between 2015 and 2020 there were some notable additions and removals to the Inventory. These changes in the study universe of industrial lands are independent of their land use status (i.e. 'Developed' or 'Other / Vacant'). These changes between Inventories are documented in the following series of tables.

323 ha (798 ac) of land were added to the Inventory, mostly in Maple Ridge, Delta, and Port Coquitlam, and 70 ha (174 ac) were removed from the Inventory. These two sets of changes resulted in a net increase of 252 ha (624 ac) of land over the 2015 to 2020 period.

(As an aside, since mid-2011 when *Metro 2040* was adopted to mid-2020, there has been a net reduction or conversion of 7.4 ha (18 ac) of 'Industrial' and 'Mixed Employment' regionally designated lands. Much of this change was from adjustments / refinements associated with processing municipal regional context statements received after the adoption of the regional growth strategy and was anticipated as part of the process of aligning municipal and regional plans.)

Table 5.1: Industrial Land Additions and Removals by Municipality, 2015-2020

	Lands Added		Lands Removed		NET Lands Added/Removed	
Municipality	**Area (Ha)**	**Area (Ac)**	**Area (Ha)**	**Area (Ac)**	**Area (Ha)**	**Area (Ac)**
Burnaby	0	1	13	33	-13	-32
Coquitlam	7	17	2	5	5	12
Delta	63	155	2	5	61	150
Langley City	0	0	2	4	-2	-4
Langley Township	12	29	7	18	5	12
Maple Ridge	182	449	0	0	182	449
New Westminster	0	0	11	27	-11	-27
North Vancouver City	0	0	0	1	0	-1
North Vancouver District	3	7	4	9	-1	-3
Pitt Meadows	10	26	0	0	10	26
Port Coquitlam	30	75	3	8	27	67
Port Moody	0	0	1	4	-1	-4
Richmond	6	14	4	9	2	4
Surrey	11	26	13	33	-3	-7
TFN	0	0	3	8	-3	-8
Vancouver	0	0	4	10	-4	-10
Total Added Lands	**323**	**798**	**70**	**174**	**252**	**624**

Major additions to the Inventory occurred in parts of Maple Ridge, some of which are located away from the region's major transportation infrastructure network.

Table 5.2: Notable Industrial Land Additions by Major Industrial Area, 2015-2020

Municipality	Area (Ha)	Area (Ac)
Maple Ridge (256th Street Industrial Area)	109	270
Maple Ridge (Southeast Waterfront)	70	174
Delta (Nordel)	63	155
Port Coquitlam (Mary Hill)	30	75
Pitt Meadows (Airport)	10	26
Surrey (Campbell Heights)	9	22
Langley Township (200 St Business Park)	7	18
Coquitlam (Pacific Reach/Cape Horn)	7	17
Richmond (Fraser Port)	6	14
Other	11	28
Total Added Lands	**323**	**798**

Of the 70 ha (174 ac) of lands removed from the Inventory, 19 ha (48 ac) or 27% were located within regionally identified Urban Centres. Notable additions to the Inventory occurred in parts of Burnaby (Still Creek), New Westminster (Queensborough), Surrey (Campbell Heights), and Langley Township (Willoughby).

Table 5.3: Notable Industrial Land Removals by Major Industrial Area, 2015-2020

Major Industrial Area	Area (Ha)	Area (Ac)
Burnaby (Still Creek)	11	26
New Westminster (Queensborough)	9	23
Surrey (Campbell Heights)	6	15
Langley Township (Willoughby)	5	13
North Shore	4	10
Surrey (South Westminster)	4	10
TFN	3	8
Port Coquitlam (Mary Hill)	3	7
Vancouver (Mt Pleasant)	2	6
Burnaby (Kingsway-Beresford)	2	5
Richmond (Brighouse/Van Horne)	2	5
Delta (Tilbury)	2	5
Other	16	38
Total Removed Lands	**70**	**174**

Lands were removed from the Inventory for several reasons, mostly due to municipal policy changes (such as OCP designation changes or lands being rezoned and developed for non-industrial uses), as shown in the following table.

Table 5.4: Reasons for Industrial Lands Removals, 2015-2020

Reason	Area (Ha)	Area (Ac)
Road Right-of-Way	15	36
Municipal Policy - Zoning Change	32	79
Municipal Policy - OCP Change	12	30
Municipal Policy - Zoning and OCP Chang	11	28
Total Removed Lands	**70**	**174**

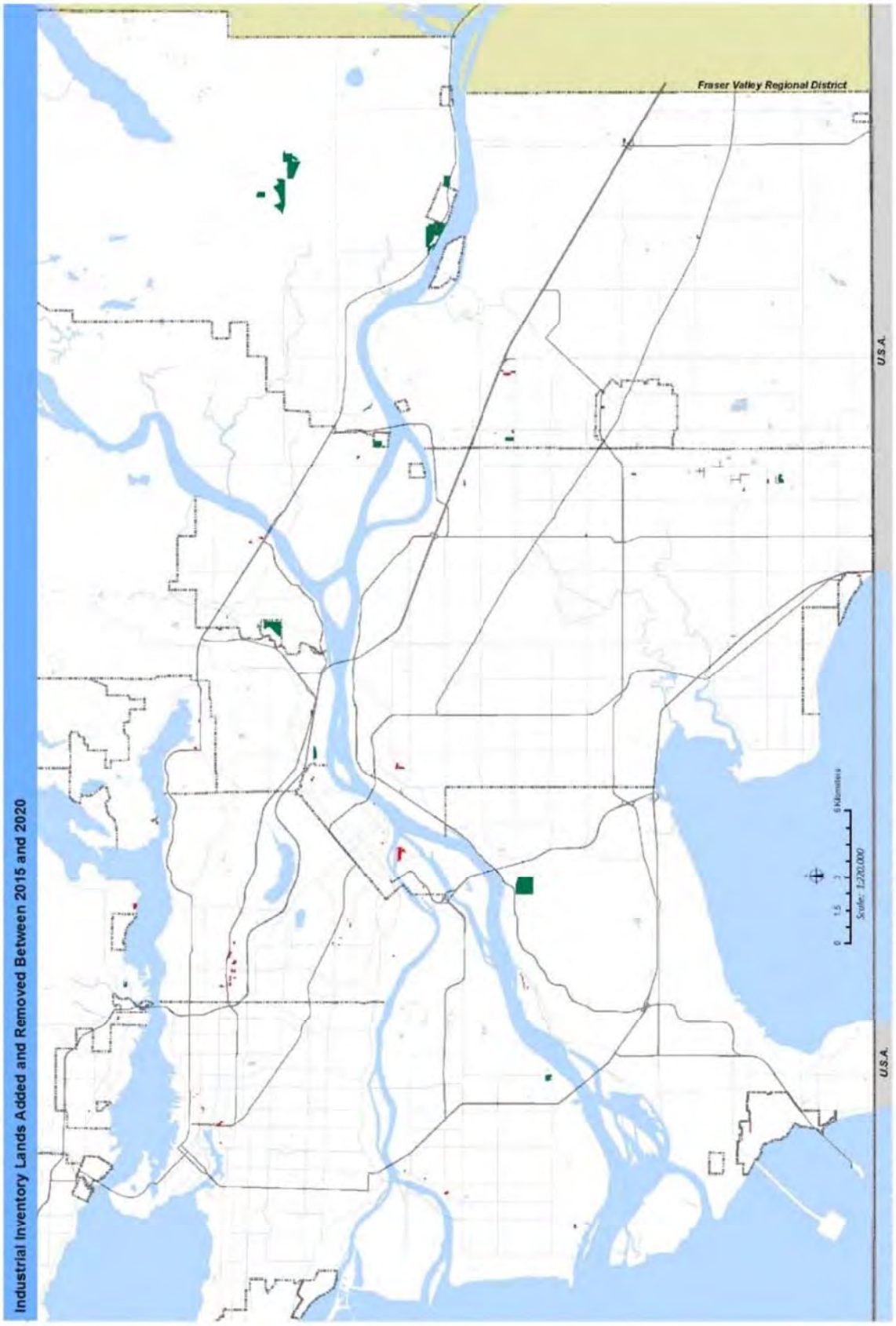
60% (43 ha) of the lands removed from the Inventory were regionally designated as 'General Urban', and therefore expected to turnover to a non-industrial use in the future. Unexpectedly however, 20% (14 ha) of the removals were regionally designated 'Industrial' and 'Mixed Employment', which are identified for industrial uses.

Table 5.5: Regional Designations of Industrial Lands Removals, 2015-2020

RGS Designation	Area (Ha)	Area (Ac)	Percent
Agricultural	0	0	0%
Con Rec	0	0	0%
General Urban	43	105	61%
Industrial	14	34	20%
Mixed Emp	14	34	20%
Total Removed Lands	**70**	**174**	**100%**

The following map shows the additions (in green) and removals (in red) to the Inventory lands between 2015 and 2020. Notable removals can be seen in Still Creek in Burnaby, Queensborough in New Westminster, Campbell Heights in Surrey, and Willoughby in Langley. Notable additions were in the 256th Street industrial area in Maple Ridge, Southeast Waterfront in Maple Ridge, Nordel in Delta, and Mary Hill in Port Coquitlam (on the Kwikwetlem Reserve).

Map 5.1: Inventory Lands Added and Removed Between 2015 and 2020



Of the 323 ha of lands added to the Inventory over the 2015-2020 period, 23 ha (7%) were 'Developed' by 2020, while 300 ha (93%) were added to the 'Other / Vacant' category (noting the different detailed categories). These newly added lands were mostly (79%) in the vacant land use classification, with an additional 9% being residential, as shown in the following table.

Table 5.6: Gross Lands Added to the 2020 Inventory by Land Use Classification

Developed Lands - Type of Use	Area (Ha)	% Share
Distribution / Warehouse	5	2%
General industrial	7	2%
Maintenance Yards / Operations Services	7	2%
Manufacturing / Production	2	1%
Outdoor Storage	1	0%
Processing / Handling of Natural Resources	2	0%
Sub-Total	**23**	**7%**
Vacant Lands - Type of Use	**Area (Ha)**	**% Share**
Agriculture	1	0%
Residential	29	9%
Resource Extraction	9	3%
Transportation Infrastructure - Port Terminal Vacant	6	2%
Vacant Land	256	79%
Sub-Total	**300**	**93%**
TOTAL	**323**	**100%**

5.4 2015 to 2020 Change in Inventories

This section compares the totals ('Developed' and 'Other / Vacant') for the 2015 (revised) and 2020 Inventories. Lands were both added to and removed from the 'Other / Vacant' and 'Developed' categories between the Inventory periods. It is important to note that this differs from 'absorption', which tracks actual lands that convert between 'Other / Vacant' and 'Developed' status over the period (see Section 5.5).

Table 5.7 shows the change between the Inventory totals, resulting in the following changes to the Inventory:

- a 5% (456 ha) increase in 'Developed' industrial lands (from 8,931 ha to 9,387 ha)
- a 9% (211 ha) decrease in 'Other / Vacant' lands (from 2,326 ha to 2,115 ha)
- a net increase of 245 ha (from 11,257 ha to 11,502 ha)

Table 5.7: Net Change in Inventories Between 2015 (revised) and 2020

Hectares	Revised 2015	2020	NET Change 2015-2020
Developed	8,931	9,387	456
Vacant	2,326	2,115	(211)
TOTAL	**11,257**	**11,502**	**245**

Acres	Revised 2015	2020	NET Change 2015-2020
Developed	22,069	23,196	1,127
Vacant	5,747	5,226	(521)
TOTAL	**27,816**	**28,422**	**606**

The following points further explain the changes in the Inventory over the 2015-2020 period:

- Of the 8,931 ha of 'Developed' lands in the 2015 Inventory, 8,674 ha (97%) remained 'Developed', 211 ha (2%) became 'Other / Vacant', and 46 ha (1%) were removed from the Inventory by 2020.
- Of the 2,326 ha of 'Other / Vacant' lands in the 2015 Inventory, 1,845 ha (79%) were still 'Other / Vacant' in 2020, 456 ha (20%) were 'Developed', and 24 ha (1%) were removed from the Inventory by 2020.

(Note: The data shown in Table 5.7 is different than the data shown in Table 5.8, where the latter only shows the lands within the Inventories converting from 'Other / Vacant' to 'Developed' (absorption) and vice versa over the 5-year period, and excludes lands added to and removed from the Inventories (both 'Other / Vacant' and 'Developed') over the 5-year period.)

5.5 2015 to 2020 Land Development / Absorption

This section explains industrial land absorption (i.e. development), which differs from additions and removals to the Inventory.

Net absorption reflects two components, for only the lands that were included in the 2015 (revised) Inventory to 2020:

- Gross lands that changed from 'Other / Vacant' status to 'Developed' status;

  minus

- Gross lands that changed from 'Developed' status to 'Other / Vacant' status over the same period.

Together, these two gross components provide for a net absorption. Although most activity consists of lands going from 'Other / Vacant' to 'Developed', some 'Developed' lands do become vacant before redeveloping. It is important to note that this absorption of land represents industrial lands as defined in the report.

The Inventory does not consider lands in the process of being developed unless or until visible construction activity (i.e. buildings, improvements) has occurred at the time of the Inventory date. Accordingly, for lands that were purchased / leased with development plans but not yet built, they were classified as vacant -- including them as 'Developed' would yield a higher recorded development or land absorption over the period.

It is important to note that documented 'absorption' or development rates are not the same as land demand. If more lands were available, particularly large sites in desired locations, the amount of land consumed or absorbed would be greater.

The following summarizes the land absorption for the Inventory periods:

- From 2015 to 2020, there was a gross positive land absorption of 507 ha (1,253 ac), and a gross negative land absorption of 23 ha (58 ac), providing for a net of 484 ha (1,196 ac), or 97 ha (239 ac) per year on average.
- The average annual absorption in the previous periods was: 76 ha (188 ac) for 2010-2015 and 93 ha (230 ac) for 2005-2010.

Notably, the land absorption rate was lower between the 2005-2010 and 2010-2015 periods, as illustrated in the following figure and table, which is generally consistent with industrial building growth over the periods. This difference in land absorption by periods could potentially be due to significant development of large industrial areas in the former period, and in the latter period less land supply available for development, and more efficient development and use of lands.

Figure 5.4: Components of Absorption of Industrial Lands (Ha)

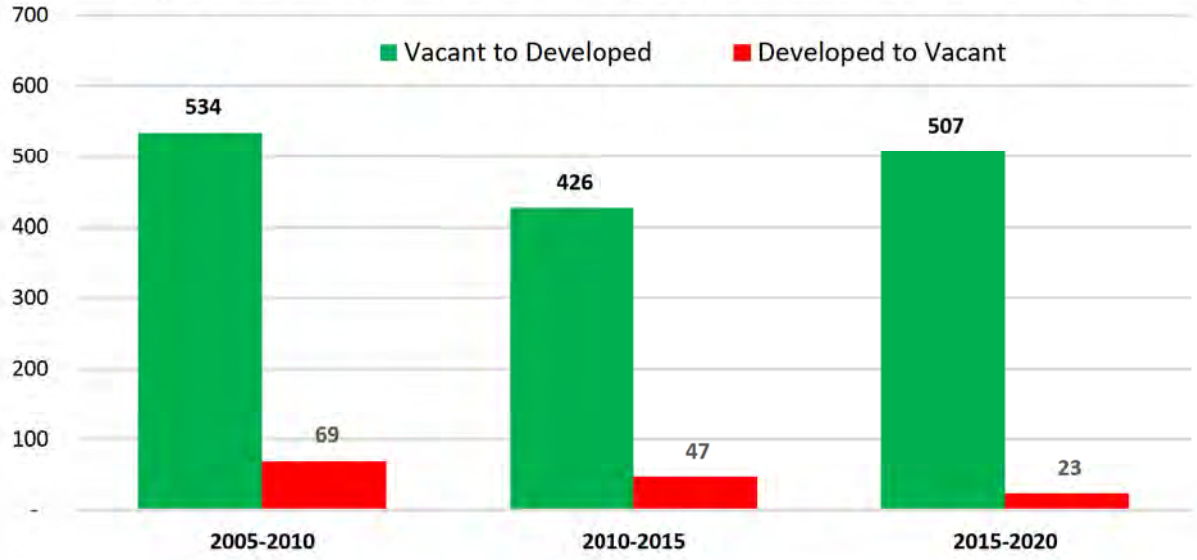


Table 5.8 shows the total lands ('Other / Vacant' and 'Developed') in both the 2015 (revised) and 2020 Inventories. The resulting difference between the 2015 and 2020 Inventories reflect two separate dynamics over the 2015-2020 period:

- Lands within the Inventories converting from 'Other / Vacant' to 'Developed' (absorption) and vice versa over the period; and
- Lands added to and removed from the Inventories (both 'Other / Vacant' and 'Developed') over the same period.

This differs from the data shown in Table 5.7, which shows the net change in Inventories between 2015 (revised) and 2020.

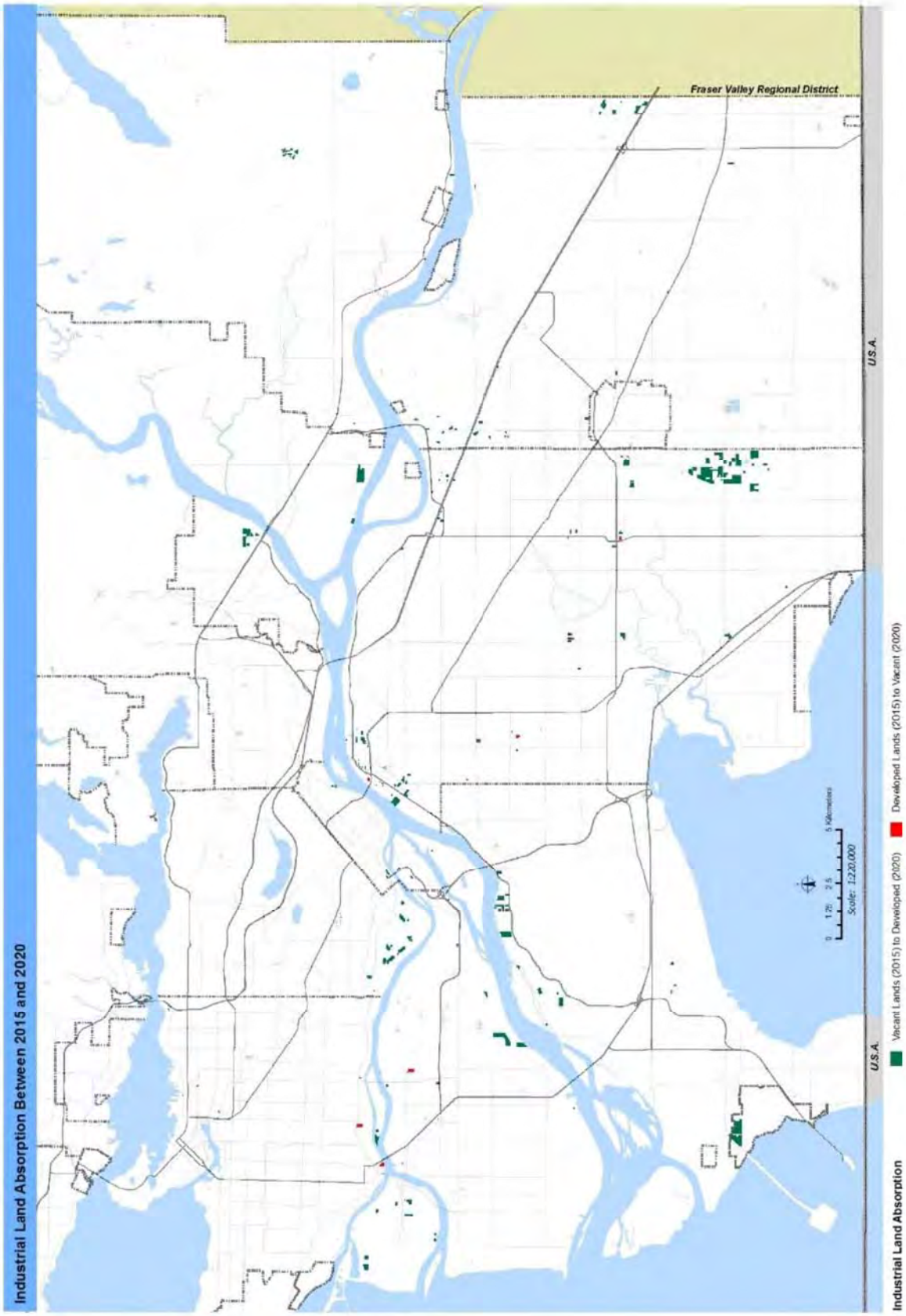
Table 5.8: Absorbed Inventory Lands, 2005-2010, 2010-2015, 2015-2020

Hectares	2005-2010	2010-2015	2015-2020
Other/Vacant to Developed	534	426	507
Developed to Other/Vacant	69	47	23
Net Absorption	465	379	484
Average Annual Net Absorption	*93*	*76*	*97*

Acres	2005-2010	2010-2015	2015-2020
Other/Vacant to Developed	1,320	1,054	1,253
Developed to Other/Vacant	170	116	58
Net Absorption	1,150	938	1,196
Average Annual Net Absorption	*230*	*188*	*239*

The following map shows the land absorption (positive and negative) activity between 2015 and 2020 as summarized in the above table. Absorbed lands are distributed throughout the region, most notably in Surrey (Campbell Heights and South Westminster), Langley Township (Willoughby and Gloucester), Delta (Tilbury), Burnaby (Big Bend), Port Coquitlam (Mary Hill), Maple Ridge (256th Street Industrial Area), and TFN and parts of Richmond.

Map 5.2: Inventory Lands Absorption Between 2015 and 2020



5.6 Types of Lands Absorbed between 2015 and 2020

For the purposes of the Inventory, land absorption is defined as the rate at which land is converted from 'Other / Vacant' status to 'Developed' status (as defined) for only the lands that were included in the 2015 (revised) Inventory. Over the 2015-2020 period, 507 ha (1,253 ac) of lands went from 'Other / Vacant' to 'Developed' status, while 23 ha (58 ac) of lands went from 'Developed' to 'Other / Vacant'. This yielded a net absorption of 484 ha (1,196 ac) of lands over the five-year period, for an annual average of 97 ha (239 ac).

The 507 ha of lands that were 'Developed' over the 2015-2020 period were distributed across the following land use classifications: 35% were added to the 'General Industrial' classification, followed by 20% in Distribution / Warehouse, 10% in Outdoor Storage, 8% in Mixed Industrial / Commercial, and 7% in Manufacturing / Production. The other categories, including some non-industrial uses, were smaller, as shown in the following table.

Table 5.9: Lands Developed over the 2015-2020 Period by Land Use Classification (as of 2020)

Type of Use	Area (Ha)	% Share
General industrial	178	35%
Distribution / Warehouse	99	20%
Outdoor Storage	53	10%
Mixed Industrial / Commercial	41	8%
Manufacturing / Production	38	7%
Transportation Infrastructure - Port Terminal Developed	23	5%
Transportation Infrastructure - YVR Airside / Groundside Developed	21	4%
Non-Industrial - Retail (small or medium-scale)	15	3%
Non-Industrial - Office	9	2%
Non-Industrial - Retail (vehicle dealerships)	6	1%
Processing / Handling of Natural Resources	5	1%
Infrastructure - Utilities	5	1%
Transportation Infrastructure - Rail Yards	4	1%
Transportation Infrastructure - Airports Airside / Groundside Developed (excluding YVR)	4	1%
Transportation - Parking	2	0%
Non-Industrial - Banquet Hall / Assembly	2	0%
Non-Industrial - Recreation	1	0%
Maintenance Yards / Operations Services	1	0%
TOTAL	**507**	**100%**

The amount of 2015 Inventory 'Other / Vacant' lands decreased by 531 ha (1,311 ac) during the 2015-2020 period: 507 ha (96%) became 'Developed' via absorption while 23 ha (4%) were entirely removed from the Inventory (due to municipal designation changes or land use changes).

5.7 Comparing Industrial Lands Inventory with Market Industrial Buildings Inventory

According to research from a local brokerage firm, the amount of tracked market industrial building floor space in the Metro Vancouver region was as shown in the following table for the noted years:

Table 5.10: Change in Building Floor Area Inventory

Building Inventory (mid year)	Total SQ FT	5 Year Change	Annual Average
2005	149,434,284		
2010	172,407,878	*22,973,594*	*4,594,719*
2015	186,173,719	*13,765,841*	*2,753,168*
2020	203,722,554	*17,548,835*	*3,509,767*

Source: Colliers Market Reports - End of Q2 reports.
Metro Vancouver Region, excluding Abbotsford.

The industrial building floor space growth rate for the 2005-2010 period was approximately 23.0 million sq ft; for the 2010-2015 period was 13.8 million sq ft; and for the 2015-2020 period 17.5 million sq ft. Within these five-year periods, the amount of development and absorption varied by year depending on a number of economic and market factors.

Over the period from 2015 to 2020, according to the 2020 Regional Industrial Lands Inventory there was industrial land absorption / development of 484 ha (1,195 ac).

The industrial building floor area increases over the three periods are generally in line with amount of industrial land developed for each period. These two data sets document the significant ongoing industrial development occurring in the region, along with some intensification, reflecting continued demand, on a limited land supply base.

However, it is not possible to accurately combine these two sets of numbers to calculate building/land density floor area ratios (FAR) due to a number of methodological and data limitation issues, namely:

- The growth in the amount of reported industrial building floor space is only that tracked by market reports, not all forms of industrial development.
- The growth in the amount of reported industrial building floor space occurred on both lands that were previously developed (infill / redevelopment) and newly developed lands (absorbed).
- Net land area is less than gross land area.

5.8 Possible Future Industrial Land Adsorption

This report is not intended to provide a detailed industrial land demand and development or absorption forecast. However, a general 'theoretical' estimate of the number of years of potential supply can be made using historical demand and absorption rates.

Past trends and input from the development and brokerage industry have generally suggested that historic rates of industrial land absorption have been between 100 and 160 ha (250 and 400 ac) per year. A 2015 study for the Port of Vancouver indicated that demand continues to be strong for industrial land, and annual demand for logistics industrial lands is forecast to increase from 40 ha (100 ac) to 65 ha (160 ac) or 85 ha (210 ac) due to increases of container throughput associated with the anticipated completion of Roberts Bank Terminal 2.

The Port's study estimated a need for 1,000 ha (2,500 ac) of well-located developable industrial land by 2035 for Roberts Bank Terminal 2, even with dramatically improved operational efficiency, plus 1,200 ha (3,000 ac) for non-port industrial land demand. Some of the demand for industrial lands is trade related, and some is local serving or not directly dependent on the transportation network.

A 2021 report by Colliers consulting estimated industrial land demand during the 2018-2020 period at 95 ha (235 ac) per year, and noted that employment-based industrial demand forecast estimated the potential need for between 80 and 110 ha (200 - 275 ac) of industrial land per year between 2020 and 2050.

Applying estimated industrial land absorption rates to the 2020 Inventory lands can be used to estimate the hypothetical lifespan of the available lands. Using the estimated 'Other / Vacant' Inventory of 2,100 ha (5,220 ac), and simply assuming an annual land absorption of 100 ha (250 ac), for example, provides for slightly over 20 years of land supply.

However, a complex set of factors affect industrial land supply, demand, use, utilization, and absorption rates, and thus there are a number of important qualifiers with any estimates:

- Potential development constraints could affect the availability and development potential of the industrial land supply. The Inventory of 'Other / Vacant' lands includes some lands with non-industrial uses as well as site challenges that may limit their development and yield.
- The development potential of a portion of the lands will be hindered by factors such as location, current uses, accessibility, lot assembly, market considerations, soil conditions, need for pre-loading, or high development costs.
- Based on these various constraints, the possible supply of net developable lands will be lower than the theoretical gross supply and is not determined in this report. (The references in the Inventory and report are all to gross land areas, not net areas.)
- Some lands in the Inventory classified as 'Other / Vacant' were in the development process and are already 'spoken for', in some cases with specific tenants proposed or building on speculation. These allocated lands may not be available for future development.

- Industrial lands in the region have different location and site attributes, and thus potential for different types of industrial users. Thus, not all of the industrial lands are usable or available for all forms of industrial users. This is particularly the case for trade-oriented uses that need access to major transportation infrastructure.
- If future port trade activity and the volume of container traffic grows at a faster pace, the region could see stronger demand and further scarcity of industrial lands would occur sooner.
- This lifespan calculation would be further impacted if existing industrial lands are converted to other uses.
- On the other hand, if intensity and redevelopment increases, land would be needed at a slower rate.
- Similarly, if additional industrial lands were added to the Inventory, the supply of the (enlarged) Inventory could be extended.

Furthermore, a buffer of free space is required to accommodate redevelopment and vacancy and other forms of transition. As land demand and development reaches saturation or full capacity, the remaining supply will include smaller, scattered remnant parcels that may not be viable for larger industrial developments due to limited size, site constraints, and/or poor location and access.

At the same time however, land absorption rates will also be affected by the redevelopment of under-utilized properties and intensification of developed industrial areas, which could extend the lifespan of the land supply.

Further study of utilization, development, redevelopment and intensification of industrial lands, as well industrial land demand, possibly by type or sector, could be completed in separate studies.

6 Conclusion

The Metro Vancouver 2020 Regional Industrial Lands Inventory provides a comprehensive summary of the quantity and quality of industrial and associated lands in the Metro Vancouver region as of mid-2020. This work supports the implementation and objectives of the regional growth strategy and Regional Industrial Lands Strategy to protect and intensify industrial lands. Inventory highlights, key findings, and possible further work are outlined in the following sections.

6.1 2020 Inventory Highlights

Building on past Inventories completed for 2005, 2010, and 2015, the 2020 Regional Industrial Lands Inventory quantifies the Metro Vancouver region's lands as follows:

- In mid-2020 there were 11,502 hectares (28,422 acres) of lands within the Inventory study universe, as defined.
- 82% (9,387 ha) of lands were 'Developed' and 18% (2,115 ha) were 'Other / Vacant', as defined.
- Despite industrial lands being earmarked in municipal plans / policies for 'industrial use', the notion of 'Developed' does not imply all are (fully) developed and used for 'industrial purposes'. 'Other / Vacant' includes lands that have non-industrial uses. These uses impact the industrial capacity of the lands.
- Most of the lands in the Inventory are located in the southern and eastern parts of the region: 22% in Surrey, 15% in Richmond, and 14% in Delta / Tsawwassen First Nation.
- 40% of lands were classified as 'Building Intensive Industrial' use, with a range of industrial uses, along with associated accessory uses.
- 25% of the lands were used for 'Large Scale Infrastructure / Transportation' (utilities, port, airport, rail yards), which are not tracked by the market. The Inventory also included lands with non-industrial uses such as 'Retail' (4%) and 'Commercial' (4%).
- Of the 'Other / Vacant' lands in the Inventory, 3% were used for 'Resource Extraction', 2% for 'Residential', 1% for 'Agriculture', and 11% were undeveloped or fully vacant. These lands will serve as the future supply of industrial development.
- In terms of site sizes, 24% of 'Other / Vacant' industrial lands were on sites larger than 20 ha (50 ac), which are often associated with trade-oriented uses, although some sites may not be well-located for trade-oriented uses. The available site size impacts the types of industrial users that can be accommodated.
- Long-term protection in the form of regional and/or municipal policy for industrial lands varies, with 89% of the Inventory regionally designated as either 'Industrial' (67%) or 'Mixed Employment' (22%). At the municipal level, 82% were both zoned industrial and designated industrial. Of the 'Developed' lands, most (85-95% depending on the land use) were protected with both municipal industrial designation and industrial zoning. Some 3% (390 ha) of the Inventory had municipal industrial zoning but not municipal industrial designation, thus are at greater risk for conversion into non-industrial use in the coming years.

6.2 Notable Changes Between 2015 and 2020

Change in Inventory Universe Size

- In terms of inclusion (additions) or exclusion (removals) from the Inventory universe (which is separate from 'vacant' or 'developed' land use status) between 2015 (revised) and 2020: 323 ha (798 ac) of land were added, and 70 ha (174 ac) were removed. These two sets of changes resulted in a net increase of 252 ha (624 ac) of land over the five-year period.
- Most of the Inventory additions occurred in: Maple Ridge, Delta, and Port Coquitlam. Notable removals from the Inventory occurred in: Still Creek in Burnaby, Queensborough in New Westminster, Campbell Heights in Surrey, and Willoughby in Langley.
- Lands were removed from the Inventory due to a number of reasons, but mostly municipal policy changes (such as OCP designation changes or lands being rezoned and developed for non-industrial uses). Of the 70 ha (174 ac) of lands removed from the Inventory, 19 ha (48 ac) or 27% were located within regionally identified Urban Centres.

Change in Inventory 'Developed' and 'Other / Vacant' Lands Components

- Of the 8,931 ha of 'Developed' lands in the 2015 Inventory (revised), 8,674 ha (97%) remained 'Developed', 211 ha (2%) became 'Other / Vacant', and 46 ha (1%) were removed from the Inventory by 2020.
- Of the 2,326 ha of 'Other / Vacant' lands in the 2015 Inventory (revised), 1,845 ha (79%) were still 'Other / Vacant', 456 ha (20%) were 'Developed', and 24 ha (1%) were removed from the Inventory by 2020.
- Of the 323 ha of new lands added to the Inventory over the 2015-2020 period, 23 ha (7%) were 'Developed' by 2020, while 300 ha (93%) were added to the 'Other / Vacant' category (noting the different detailed categories). These newly added lands were mostly (79%) in the vacant classification, with an additional 9% being residential and 6% on Port terminal lands.
- From 2015 to 2020, there were the following changes to the Inventory:
    - a 5% (456 ha) increase in 'Developed' industrial lands (from 8,931 ha to 9,387 ha)
    - a 9% (211 ha) decrease in 'Other / Vacant' lands (from 2,326 ha to 2,115 ha)
    - a net increase of 245 ha (from 11,257 ha to 11,502 ha)

Industrial Lands Absorption

- In terms of absorption (vacant lands becoming developed, or vice versa) over the 2015 to 2020 period, 507 ha (1,253 ac) went from 'Other / Vacant' to 'Developed' status, while 23 ha (58 ac) of lands went from 'Developed' to 'Other / Vacant' status. This yielded a net absorption of 484 ha (1,196 ac) of lands over the five-year period, for an annual average of 97 ha (239 ac).
- The annual average net absorption of 97 ha during the 2015-2020 period was higher than the previous 2010-2015 and 2005-2010 periods where it averaged 76 ha and 93 ha, respectively.
- The amount of 'Other / Vacant' lands decreased by 531 ha (1,311 ac) during the 2015-2020 period: 507 ha (96%) became 'Developed' via absorption, while 23 ha (4%) were entirely removed from the Inventory (due to municipal designation changes or land use changes).

6.3 Important Considerations

Inventory methodology limitations are important considerations

The land use classification definitions reference the predominant or primary use of the site, including normally associated on-site accessory / ancillary uses (including parking and loading areas), as of mid-2020. Properties may include multiple or overlapping and non-discrete uses, in which case the predominant use is considered for the classification.

The classification process cannot be perfectly accurate, given the variety of different data sources and currency. This limitation in terms of selecting a single classification for each site is particularly acute in cases where there is a wider range of uses on lands or multiple level buildings.

The 2020 Inventory includes 30 detailed land use classifications, which are in some cases consolidated into 7 categories for reporting, spread over 9 sub-regions. Current land use classifications are independent of future-oriented land use designations / policies.

Qualitative attributes of lands matter

The Inventory comprises lands used and intended for industrial. The Inventory includes traditional and new types of industrial activities, quasi-industrial functions, and non-industrial uses on the lands. This may be in the form of various industrial uses of different types and scales; infrastructure and utilities that are not tracked by the market; commercial and retail uses that may have been pre-existing in an area or added more recently; and vacant and holding uses that may be temporary until the lands are developed for industrial as intended in the relevant land use plans.

It is important to note that the lands inventoried and amounts reported are gross areas; various types of constraints or limitations will reduce the net developable amount of land.

There is a wide range of types of industrial lands and industrial uses, which have different attributes and user needs. Industrial lands are not homogeneous and readily interchangeable or replaceable. The quality of lands, such as attributes like size, location, and site features, are as important as quantity of lands. For example, there may be vacant industrial lands available, but if they are located far away from major transportation infrastructure or have topographic constraints, it may not be viable for some or many types of industrial users. Thus, nuance is required when reviewing the statistics.

The 'Other / Vacant' lands category includes both lands that are completely vacant, and some other temporary holding uses such as agricultural, residential, and resource extraction, which may eventually be redeveloped in the form of industrial.

At the same time, 'Developed' lands have opportunity over time to redevelop to higher density / intensity forms of industrial buildings / uses. Industrial intensification / densification is a means to increase the industrial capacity of lands in a region with a limited land supply.

Increasing amounts of industrial lands are used for non-industrial purposes

Conversion of industrial lands can occur in different ways. Some industrial lands are re-designated and removed from the Inventory as per municipal plans, while other lands with flexible industrial designations are rezoned to allow for non-industrial uses. Some of these other types of uses support industrial activities, while others may threaten industrial areas, such as commercial and retail beyond those accessory or supporting industrial uses.

Some municipal plans include 'mixed employment' designations and zones that permit a wide range of industrial and commercial uses, which allows for more non-industrial uses in industrial areas, such as stand-alone retail, office, and other commercial. Allowing non-industrial uses in industrial areas reduces the land supply for industrial users and also can increase land prices and create land-use conflicts. These issues can destabilize industrial areas and compromise the ability for industrial growth.

Continued competing priorities for limited lands

The Metro Vancouver regional growth strategy and Regional Industrial Lands Strategy include industrial and other long range regional planning goals, such as accommodating population and employment growth, focusing commercial and housing development in Urban Centres, protecting agricultural and environmental lands, and supporting sustainable transportation forms. Because of these multiple objectives, at both the regional and local levels, there are in some cases competing or even conflicting policy priorities. For example, while protecting industrial lands is important, development of lands for housing and employment in Urban Centres and near rail rapid transit stations is also important.

Most but not all industrial lands are secured for long-term protection

Municipal policies (land use designations and zoning) and regional land use designations secure the long-term industrial use of industrial lands. These protective regional designations cover 82% of the lands in the Inventory. Lands that do not have such policy protection are more likely to convert and redevelop to other uses, particularly lands located in Urban Centres. Although in some cases this change may be consistent with local and regional plans, such conversions further reduce the supply of lands available for industry.

Lands added to and removed from the Inventory have different locational and site attributes

From 2015 to 2020, there was a net increase in the Regional Industrial Lands Inventory of 245 ha. During this period, 323 ha of land were added to the Inventory, mostly in Surrey, Langley, and Maple Ridge, and 70 ha were removed from throughout the region.

This figure reflects the fact that the amount of 'Other / Vacant' lands decreased by 9% (211 ha); some of which became 'Developed' (507 ha) and some of which were removed from the Inventory due to conversion to other uses (23 ha). Lands were removed from the Inventory due to a number of reasons, but mostly due to municipal policy changes (such as OCP designation changes or lands being rezoned and developed for non-industrial uses).

Much of the lands added to the Inventory were in locations not well served relative to the region's major transportation infrastructure networks / goods movement corridors nor have other key attributes desired by the market, whereas some of the lands removed had good accessibility. This reiterates the point that lands do not all have the same attributes, and quantitative as well as qualitative considerations are both important.

The conversion of industrial land reduces opportunities for industrial development and industrial business expansion, and the limited land supply and higher land prices may push some industrial activity to other jurisdictions, with transportation, economic, employment, and taxation implications for the region.

Few available large sites for 'trade-oriented' logistics uses

There are few vacant sites available for 'trade-oriented' logistics users, namely large sites with minimal constraints and close to major transportation infrastructure. Most of the 'best' sites have already been developed. More industrial development, particularly logistics related activities occurring at increasingly farther away locations relative to the port terminals due to lack of available closer lands, may create longer truck trips (drayage) and associated traffic congestion and environmental impacts.

More industrial land intensification is expected over time

Most of the developed lands are substantially used, with limited immediate opportunity for redevelopment and intensification. Nevertheless, as these lands redevelop there will be potential to densify and intensify. In some cases, abutting smaller properties can be consolidated and redeveloped in order to create larger sites for larger tenants.

The industrial land absorption rate declined due to limited raw land supply

The net land absorption (lands changing from 'Other / Vacant' to 'Developed' status) was 484 ha over the 2015-2020 period, or 97 ha per year on average. This rate was higher than the previous periods of 2005-2010 (average annual absorption rate of 93 ha) and 2010-2015 (76 ha). However, it is important to note that although recorded development / absorption activity is a reflection of industrial demand, it is in fact limited by the amount of land supply, so it is not a true reflection of total demand. If more lands were available, more lands would be developed.

Difficult to estimate lifespan of available vacant lands

Assumptions about the future absorption rate impact the calculation of the estimated lifespan of the existing supply of industrial lands. The amount of development will be impacted not just by demand but also increasingly by the limited supply of available vacant industrial lands that can be brought to market, as well as redevelopment and intensification activity. Using a theoretical absorption forecast model, the 'Other / Vacant' industrial land supply might be substantially absorbed in the 2030s. However, it is important to note that before full depletion, the remaining land supply would be small, scattered parcels that would not be viable for larger industrial development.

6.4 Further Study Topics

The 2020 Regional Industrial Lands Inventory can be considered and analyzed through different 'lenses' or 'filters' from different perspectives. Accordingly, building on the Inventory results, further study is possible, such as: industrial intensification, market readiness, regional land use assessment, industrial typologies, and other topics related to industrial lands, employment, economy, and transportation.

Intensification / Redevelopment Potential

Redevelopment and intensification are also an important way to extend the lifespan of the limited supply of industrial lands in the region. Further work can identify the lands with the greatest potential for redevelopment and intensification / densification. Specifically, this could consider and categorize the different factors that impact the potential of industrial lands to redevelop and intensify.

Market Readiness Timing

Not all 'vacant' lands can be readily developed in the short-term. Further work can categorize the different types of constraints / opportunities and considerations to estimate 'market readiness' or potential timing for the industrial development of lands.

This analysis could supplement reports that review in detail a sub-set of the Inventory in terms of site specific constraints and development potential. The methodology for the analysis consists of assessing and categorizing the development potential of 'vacant' industrial lands by select features.

Regional Land Use Assessment

A regional land use assessment would comprise preparing a regional 'land budget' model of current supply and anticipated demand by land use category, for all land uses not just industrial. The technical assessment, prepared in collaboration with member jurisdictions and other stakeholders, would look to identify the 'best' locations for uses / typologies based on land capacity and a set of criteria (current and future). The comprehensive regional land use assessment would further enhance the understanding of the lands in the region by attribute, use potential (current supply) and land needs criteria (long-term demand), so as to support regional growth planning. The assessment could result in identifying opportunities for more optimized locations and uses of land to support regional policy objectives, infrastructure investments, refine growth targets, and inform policy changes.

Industrial Land Typologies

Develop and define industrial land typologies and their associated characteristics to provide for a refined and nuanced understanding of the industrial lands in the region, as well as of the needs of industrial users by different sectors. By defining industrial land typologies and associated intensity measures, this work could support the development of a more accurate and realistic understanding of the industrial lands reflecting the different users of land, and how this relates to possible changes in land uses.

In some cases these typologies are somewhat linear, as in a continuum / spectrum, from 'lower intensity / density' to 'higher intensity / density', while for others there are more variables and simple singular measures do not tell the full story.

Industrial Employment

Industrial lands contain over one-quarter of the employment in the region. The form of industrial activity and associated employment types and densities are evolving with the changing economy. Some forms of industrial uses, such as modern warehouses, have efficient operations supported by automation and fewer employees, whereas other types of industry, such as manufacturing and assembly, have a much greater density of employees (per building floor space or per land area). These industry trends could be further studied to determine the implications on industrial land demand and uses.

Other Potential Topics

Other areas for potential further study include:

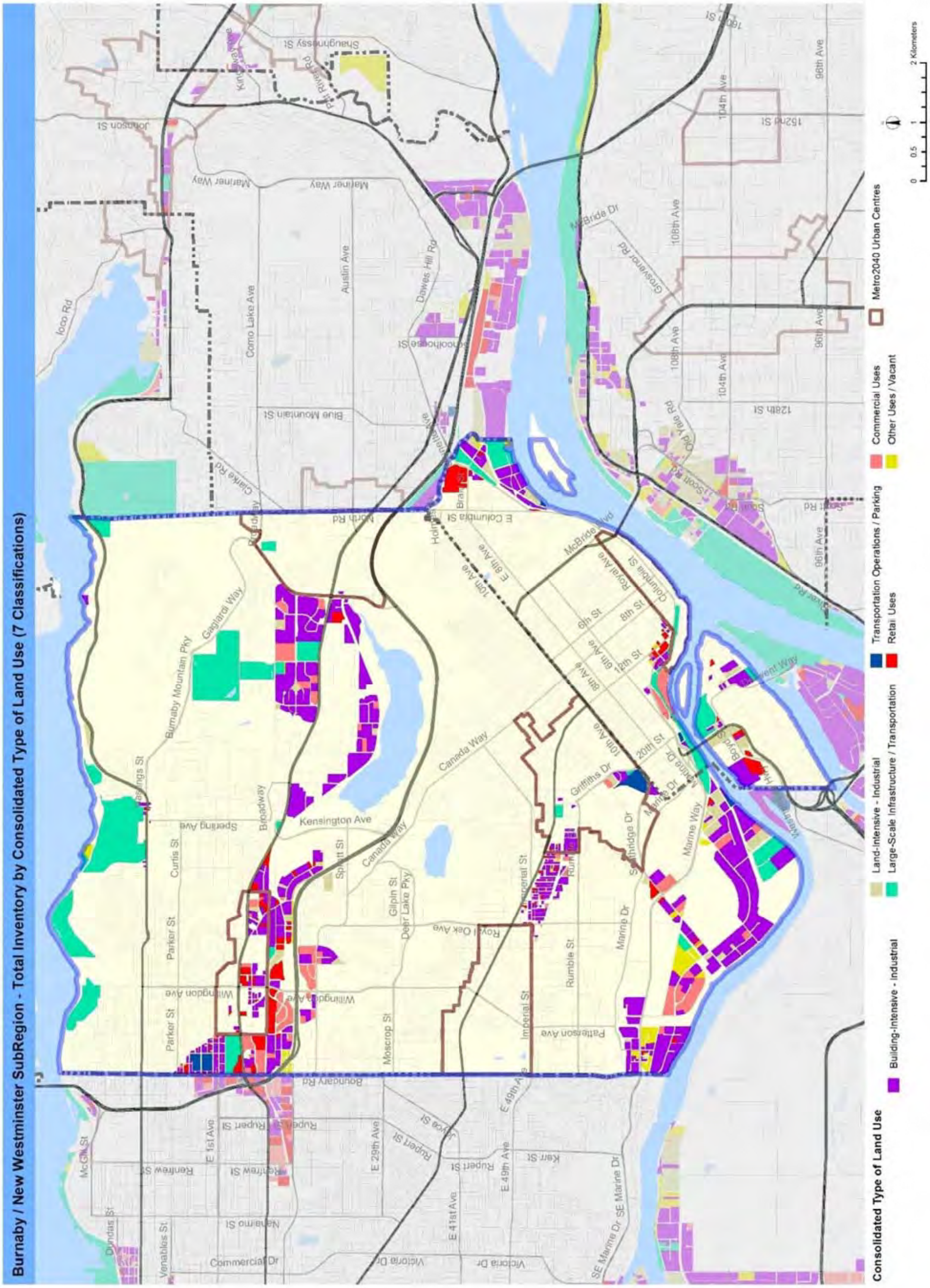
- Industrial land demand scenarios and absorption forecasts
- Quantify economic impact of industrial land development and use activities
- Industrial economic and employment activities lost to other jurisdictions
- Goods movement / logistics transportation infrastructure supporting industry
- Growth of e-commerce impacts on industrial lands
- Comprehensive study on origins and destinations to find potential efficiencies in the system
- Document employment on industrial lands to provide a better understanding of trip generation
- Industrial parking supply and demand
- Industrial lands governance experiences in other jurisdictions
- Innovative building design examples / best practices

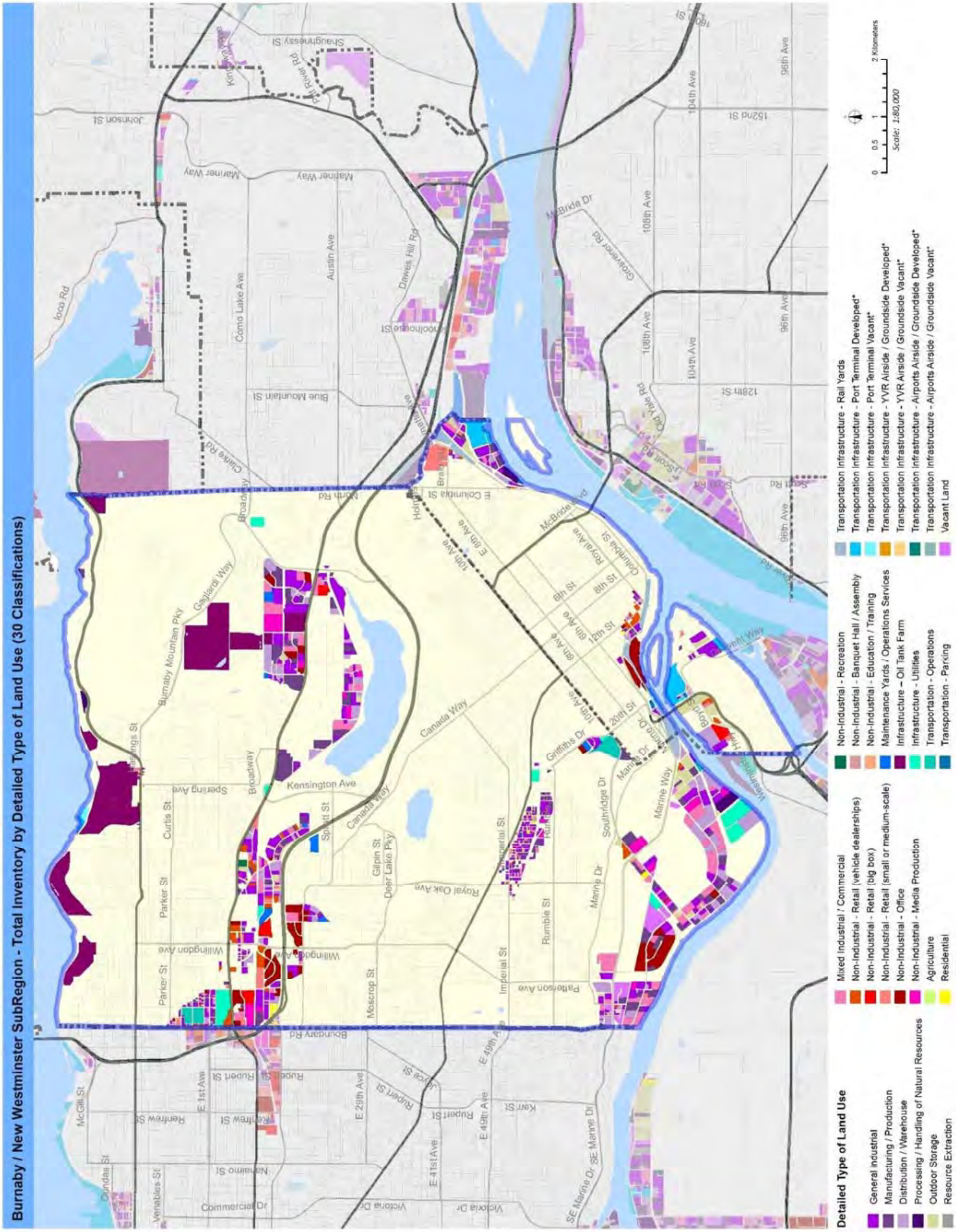
6.5 Closing

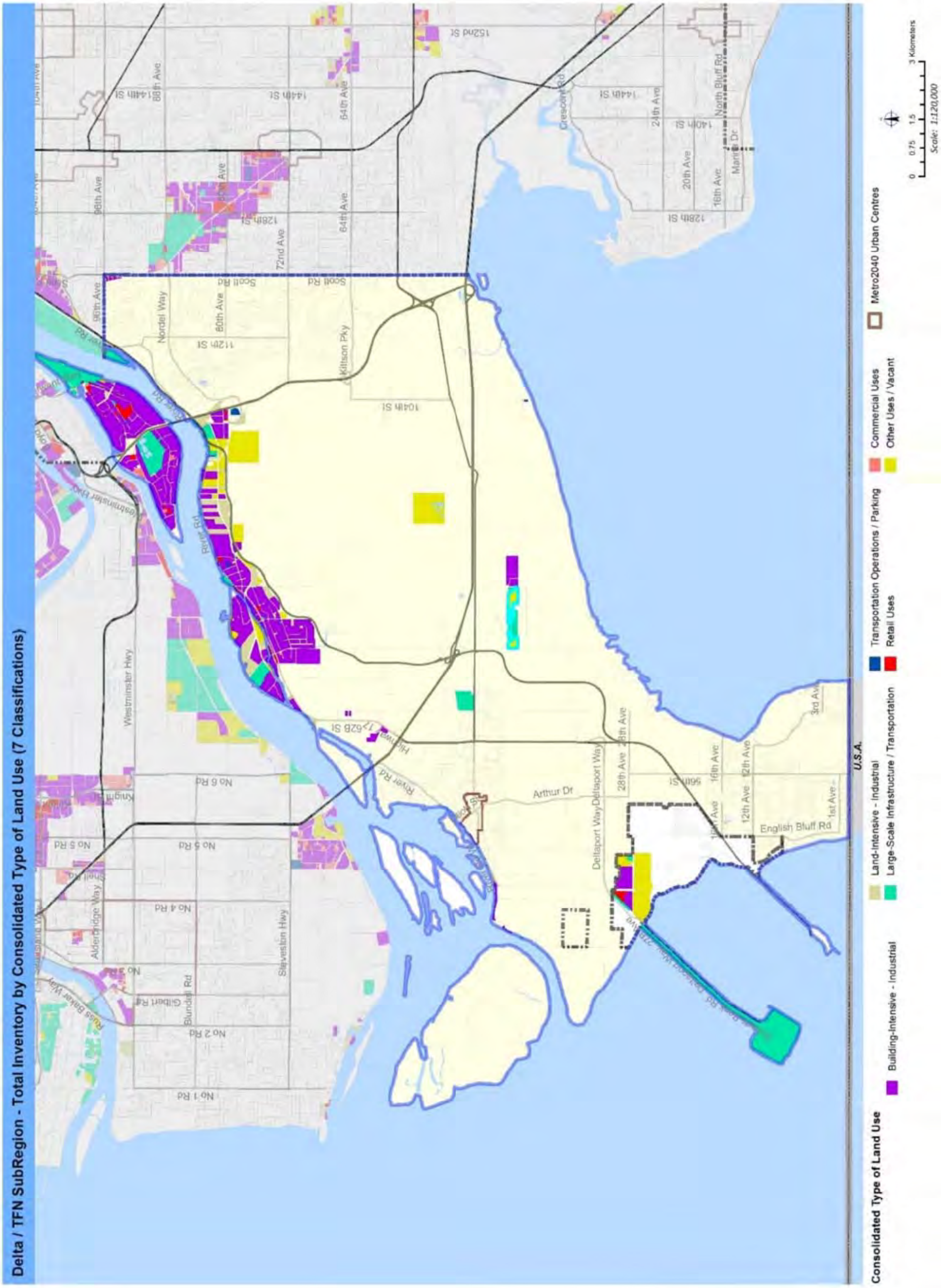
Metro Vancouver is a high growth region and the documentation and protection of industrial land is one of many important regional objectives. Undertaking the 2020 Regional Industrial Lands Inventory entailed working with member municipalities, agencies, and industry to create an updated and detailed inventory of industrial and associated lands in the region. The Inventory results can assist in advancing the implementing of the regional growth strategy and the Regional Industrial Lands Strategy, support municipalities in their efforts to protect and intensify industrial lands, and provide public agencies and the development community with additional information about available industrial lands and opportunities. The Inventory will be updated periodically and the results will be used as the basis for further analysis, information sharing, and engagement.

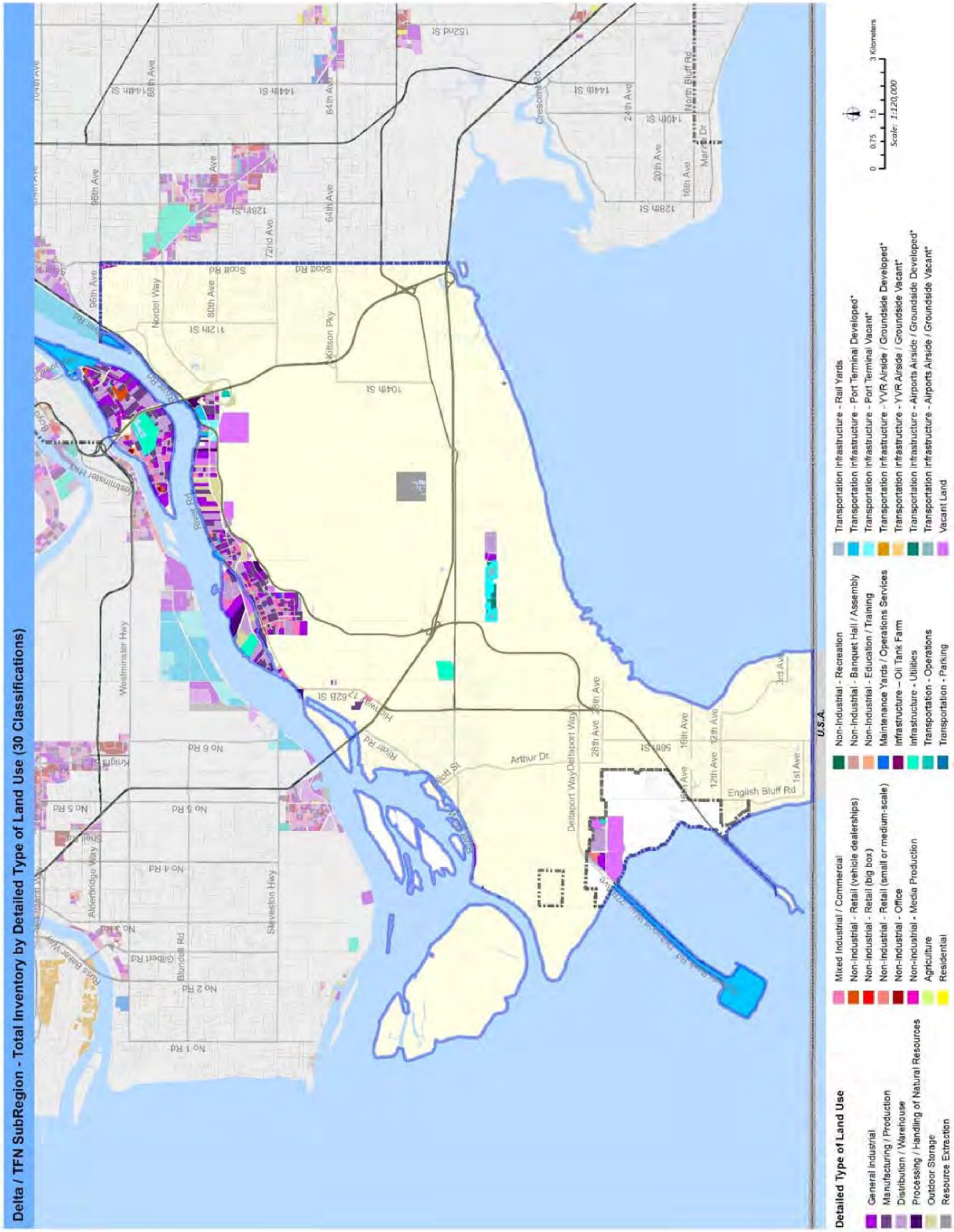
Appendix 1: Sub-Regional Inventory Maps

- Burnaby / New Westminster
- Delta / Tsawwassen First Nation
- Langleys (City of Langley, Township of Langley)
- North-East Sector (City of Port Moody, City of Coquitlam, City of Port Coquitlam)
- North Shore (City of North Vancouver, District of North Vancouver)
- Richmond (including YVR / Sea Island)
- Ridge / Meadows (City of Maple Ridge, City of Pitt Meadows)
- Surrey / White Rock
- Vancouver


Burnaby / New Westminster SubRegion - Total Inventory by Consolidated Type of Land Use (7 Classifications)
Consolidated Type of Land Use
Building-Intensive - Industrial
Land-Intensive - Industrial
Large-Scale Infrastructure / Transportation
Transportation Operations / Parking
Retail Uses
Commercial Uses
Other Uses / Vacant
Metro2040 Urban Centres
0 0.5 1 2 Kilometers
Scale: 1:80,000


Burnaby / New Westminster SubRegion - Total Inventory by Detailed Type of Land Use (30 Classifications)
Detailed Type of Land Use
General Industrial
Manufacturing / Production
Distribution / Warehouse
Processing / Handling of Natural Resources
Outdoor Storage
Resource Extraction
Mixed Industrial / Commercial
Non-Industrial - Retail (vehicle dealerships)
Non-Industrial - Retail (big box)
Non-Industrial - Retail (small or medium-scale)
Non-Industrial - Office
Non-Industrial - Media Production
Agriculture
Residential
Non-Industrial - Recreation
Non-Industrial - Banquet Hall / Assembly
Non-Industrial - Education / Training
Maintenance Yards / Operations Services
Infrastructure – Oil Tank Farm
Infrastructure - Utilities
Transportation - Operations
Transportation - Parking
Transportation Infrastructure - Rail Yards
Transportation Infrastructure - Port Terminal Developed*
Transportation Infrastructure - Port Terminal Vacant*
Transportation Infrastructure - YVR Airside / Groundside Developed*
Transportation Infrastructure - YVR Airside / Groundside Vacant*
Transportation Infrastructure - Airports Airside / Groundside Developed*
Transportation Infrastructure - Airports Airside / Groundside Vacant*
Vacant Land
Scale: 1:80,000
2 Kilometers


Delta / TFN SubRegion - Total Inventory by Consolidated Type of Land Use (7 Classifications)
Consolidated Type of Land Use
Building-Intensive - Industrial
Land-Intensive - Industrial
Large-Scale Infrastructure / Transportation
Transportation Operations / Parking
Retail Uses
Commercial Uses
Other Uses / Vacant
Metro2040 Urban Centres
U.S.A.
Scale: 1:120,000
3 Kilometers


Delta / TFN SubRegion - Total Inventory by Detailed Type of Land Use (30 Classifications)
Detailed Type of Land Use
General Industrial
Manufacturing / Production
Distribution / Warehouse
Processing / Handling of Natural Resources
Outdoor Storage
Resource Extraction
Mixed Industrial / Commercial
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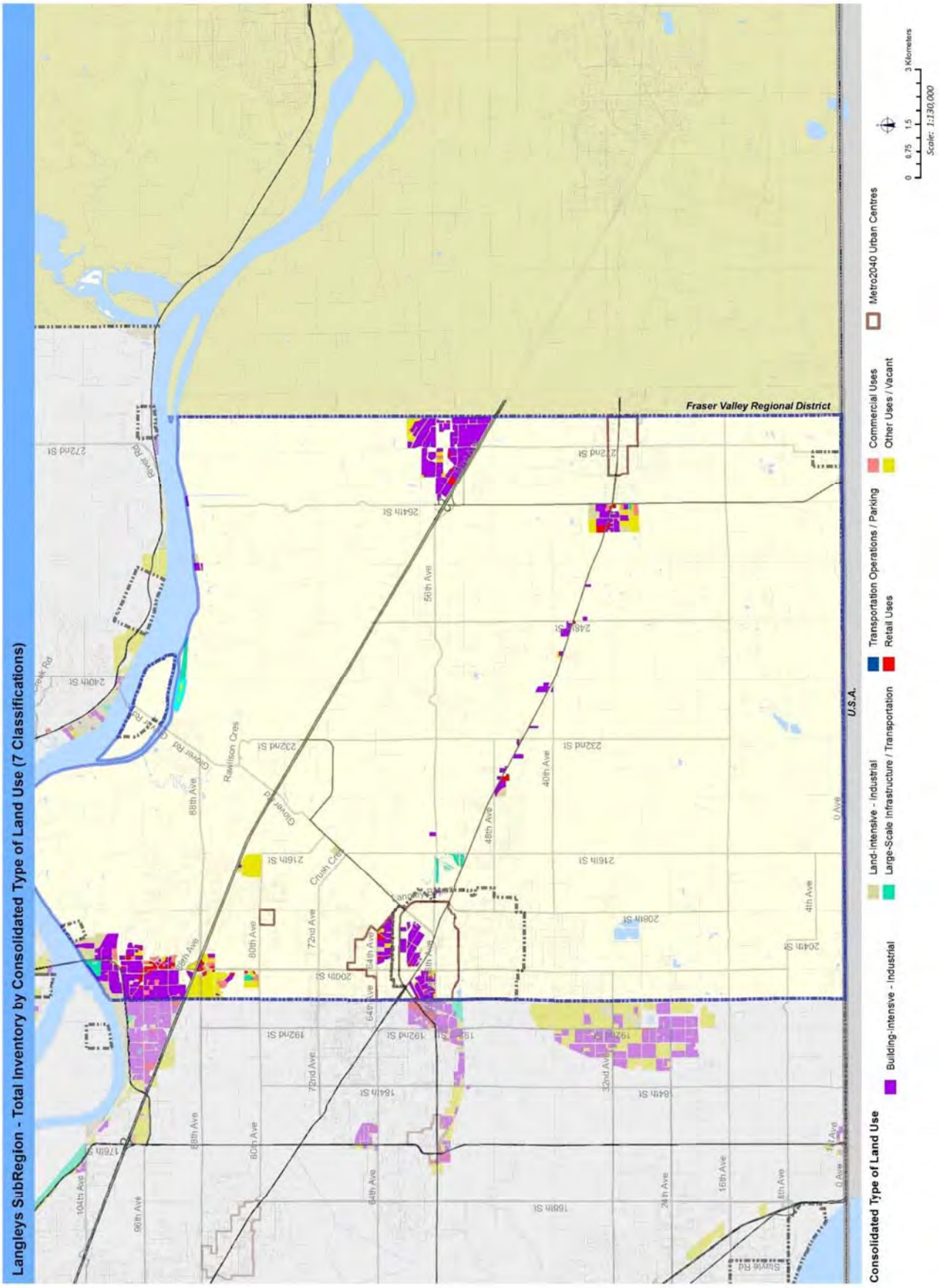
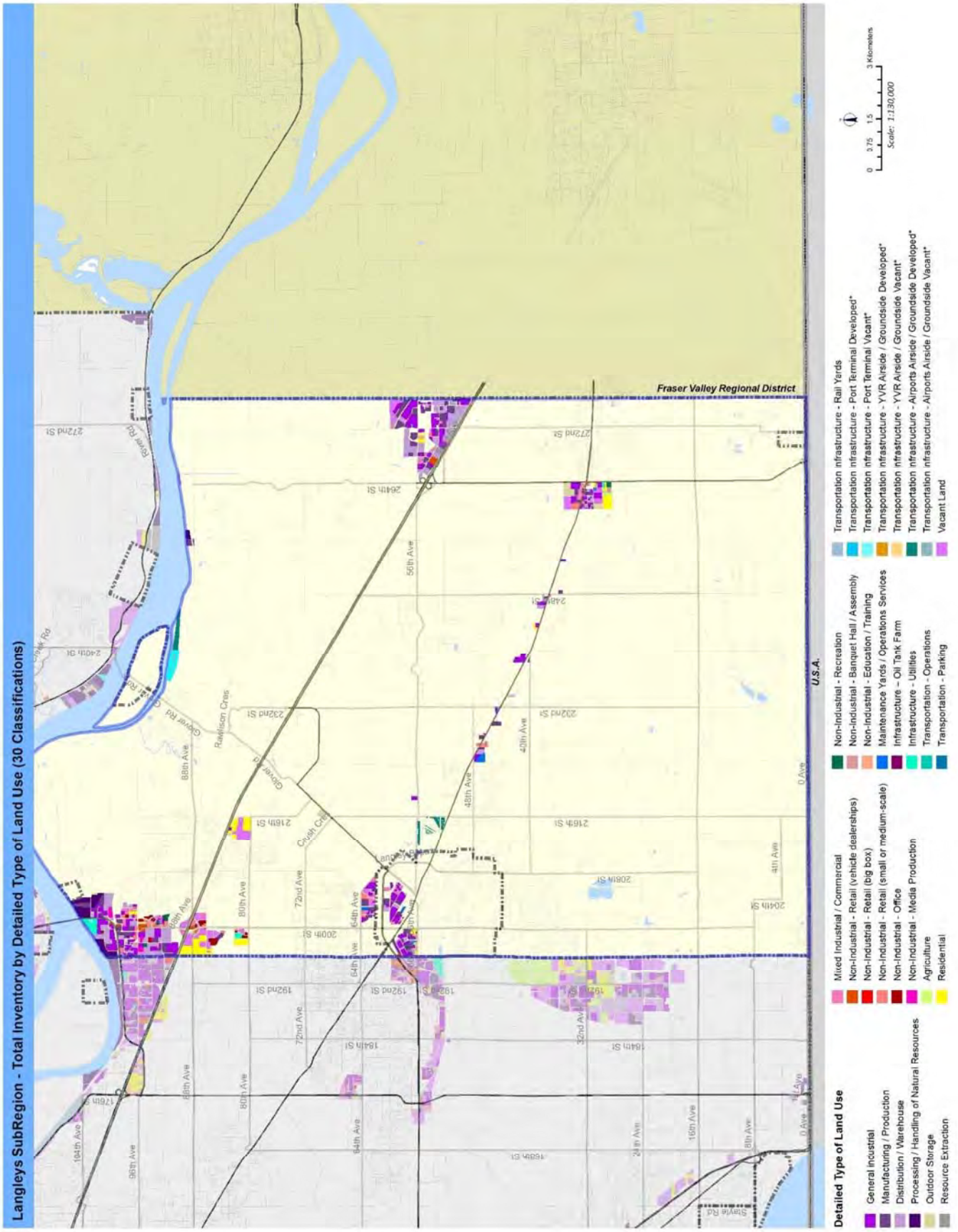
Non-Industrial - Office
Non-Industrial - Media Production
Agriculture
Residential
Non-Industrial - Recreation
Non-Industrial - Banquet Hall / Assembly
Non-Industrial - Education / Training
Maintenance Yards / Operations Services
Infrastructure - Oil Tank Farm
Infrastructure - Utilities
Transportation - Operations
Transportation - Parking
Transportation Infrastructure - Rail Yards
Transportation Infrastructure - Port Terminal Developed*
Transportation Infrastructure - Port Terminal Vacant*
Transportation Infrastructure - YVR Airside / Groundside Developed*
Transportation Infrastructure - YVR Airside / Groundside Vacant*
Transportation Infrastructure - Airports Airside / Groundside Developed*
Transportation Infrastructure - Airports Airside / Groundside Vacant*
Vacant Land
0 0.75 1.5 3 Kilometers
Scale: 1:120,000
U.S.A.


Langleys SubRegion - Total Inventory by Consolidated Type of Land Use (7 Classifications)
Fraser Valley Regional District
U.S.A.
Consolidated Type of Land Use
Building-Intensive - Industrial
Land-Intensive - Industrial
Large-Scale Infrastructure / Transportation
Transportation Operations / Parking
Retail Uses
Commercial Uses
Other Uses / Vacant
Metro2040 Urban Centres
Scale: 1:130,000
0 0.75 1.5 3 Kilometers


Langleys SubRegion - Total Inventory by Detailed Type of Land Use (30 Classifications)
Fraser Valley Regional District
U.S.A.
Scale: 1:130,000
Detailed Type of Land Use
General Industrial
Manufacturing / Production
Distribution / Warehouse
Processing / Handling of Natural Resources
Outdoor Storage
Resource Extraction
Mixed Industrial / Commercial
Non-Industrial - Retail (vehicle dealerships)
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Non-Industrial - Retail (small or medium-scale)
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Agriculture
Residential
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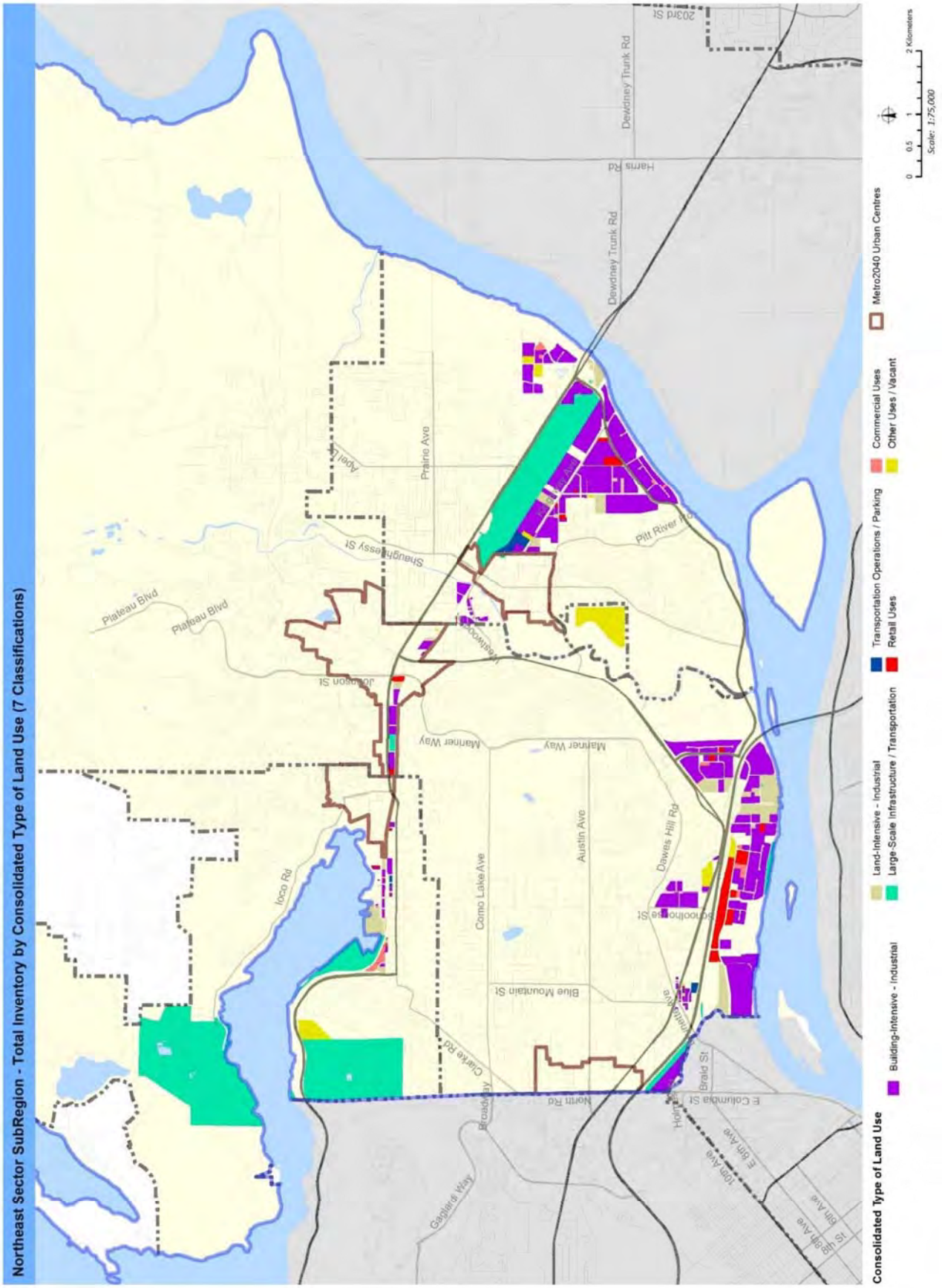
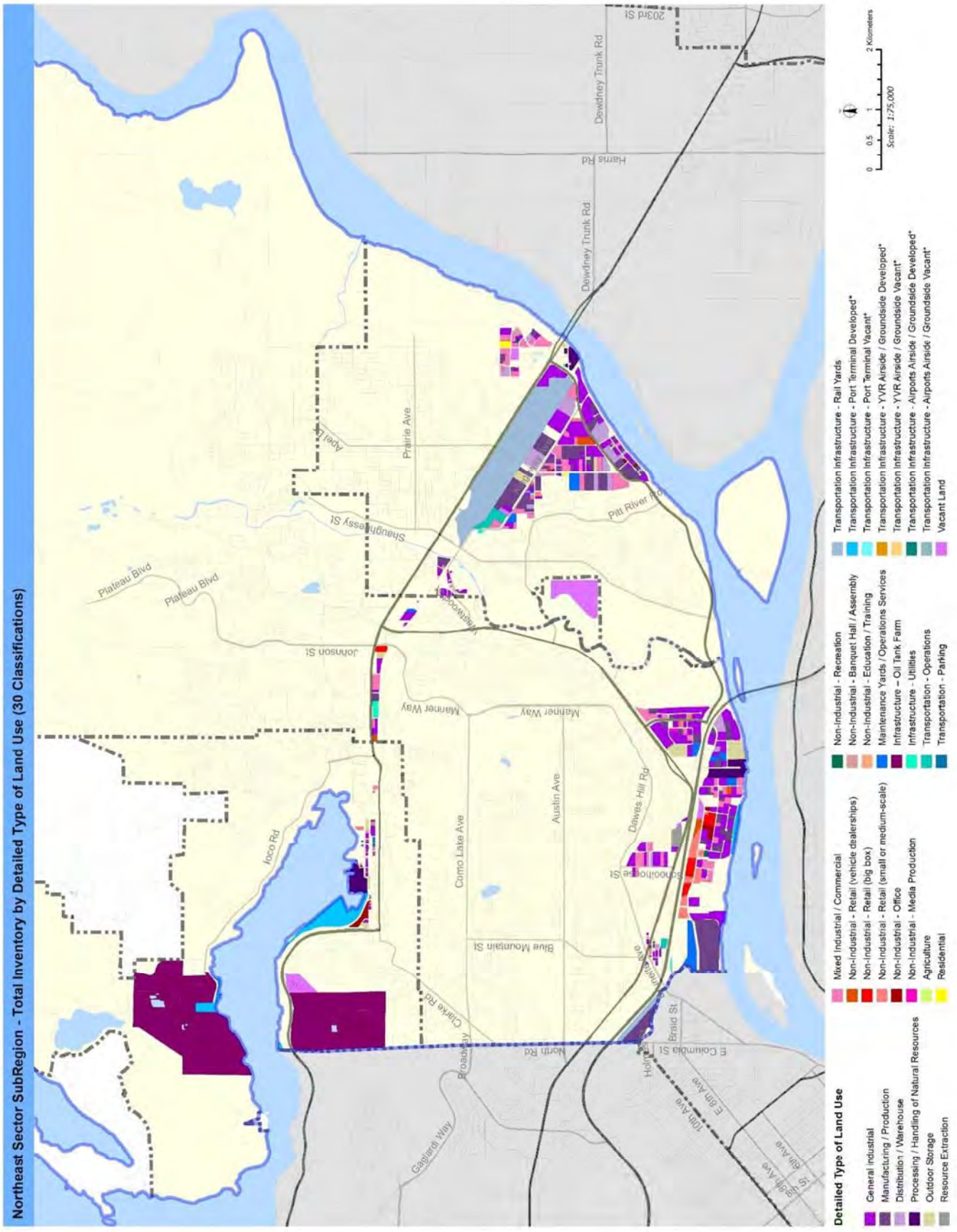
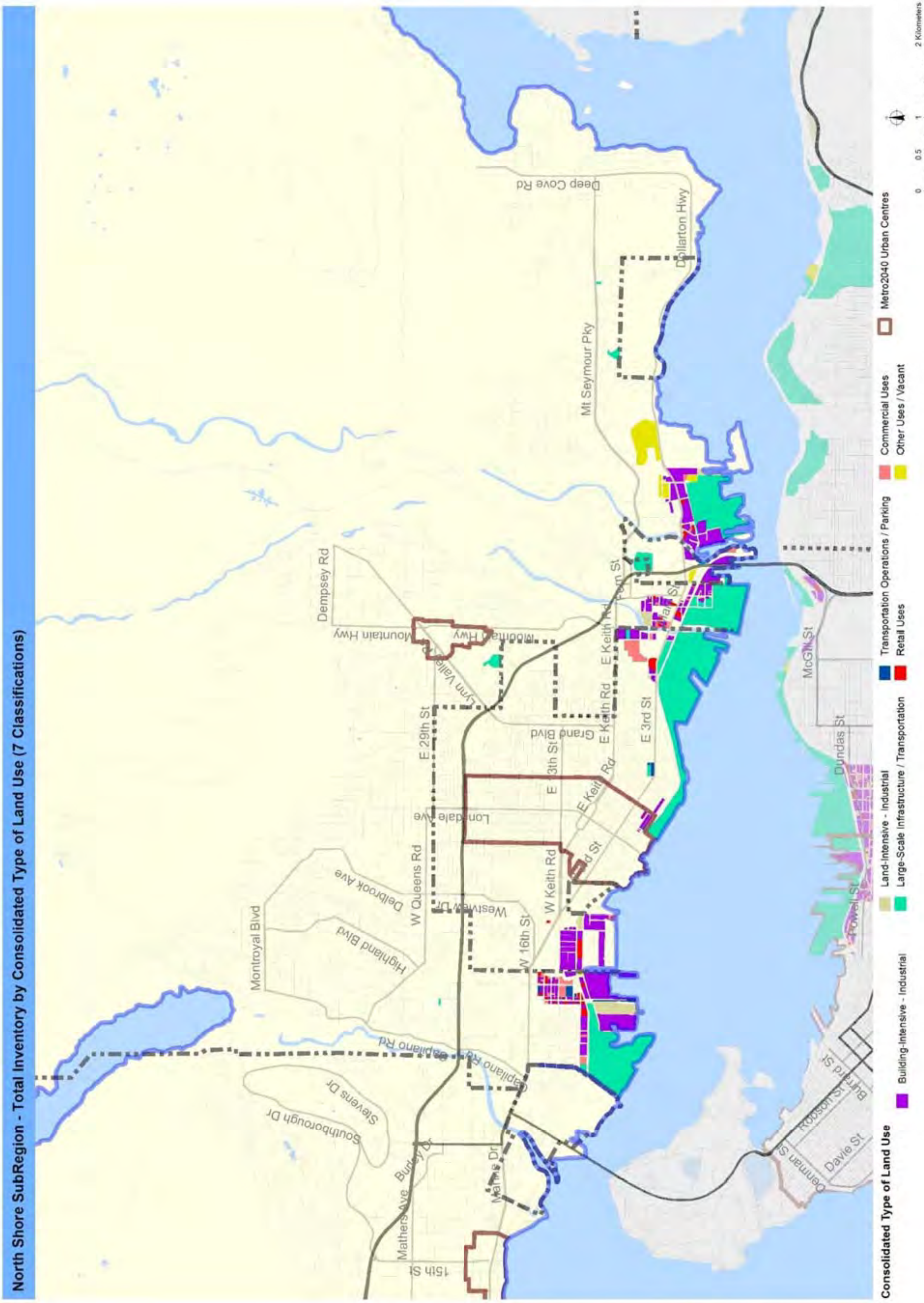
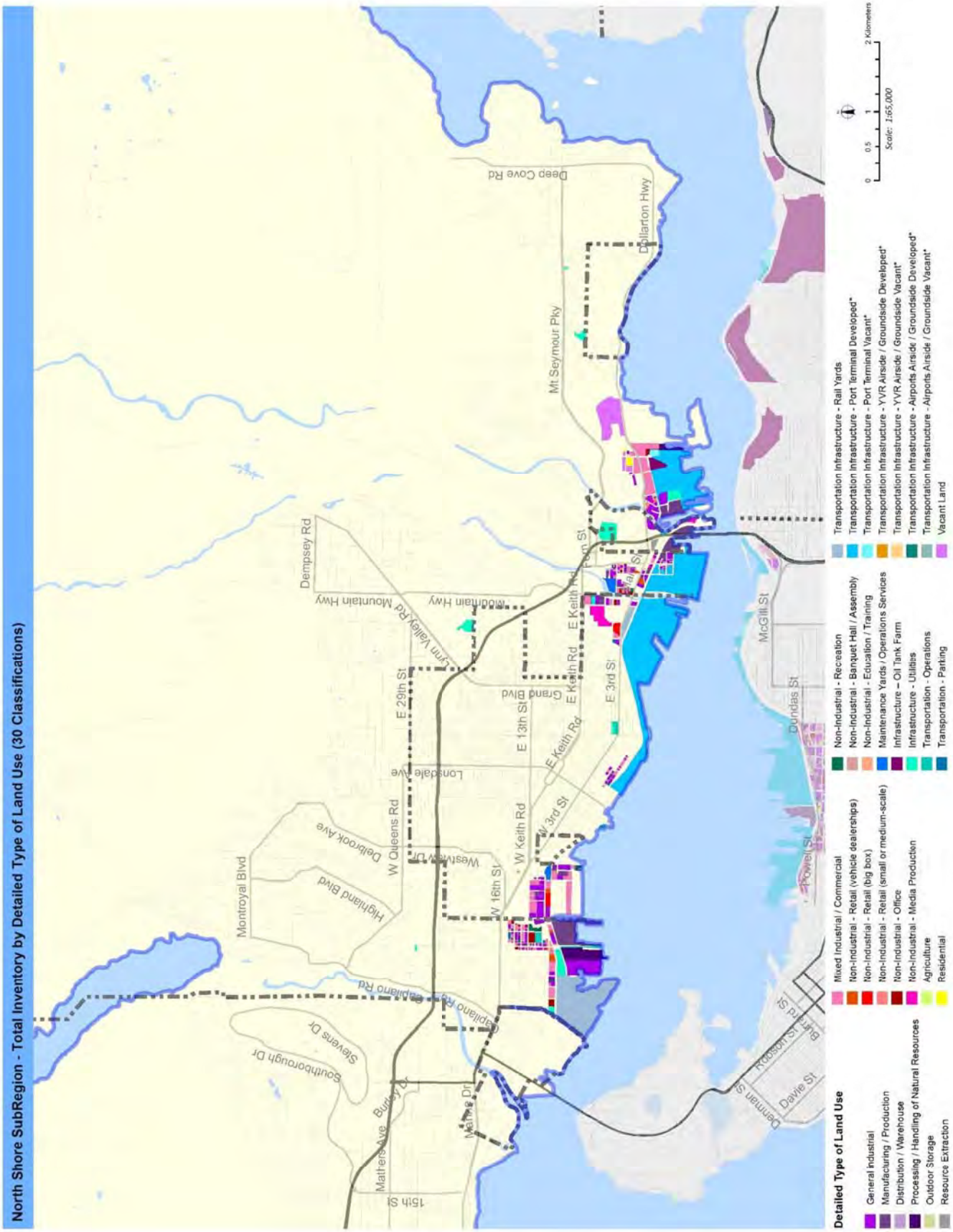
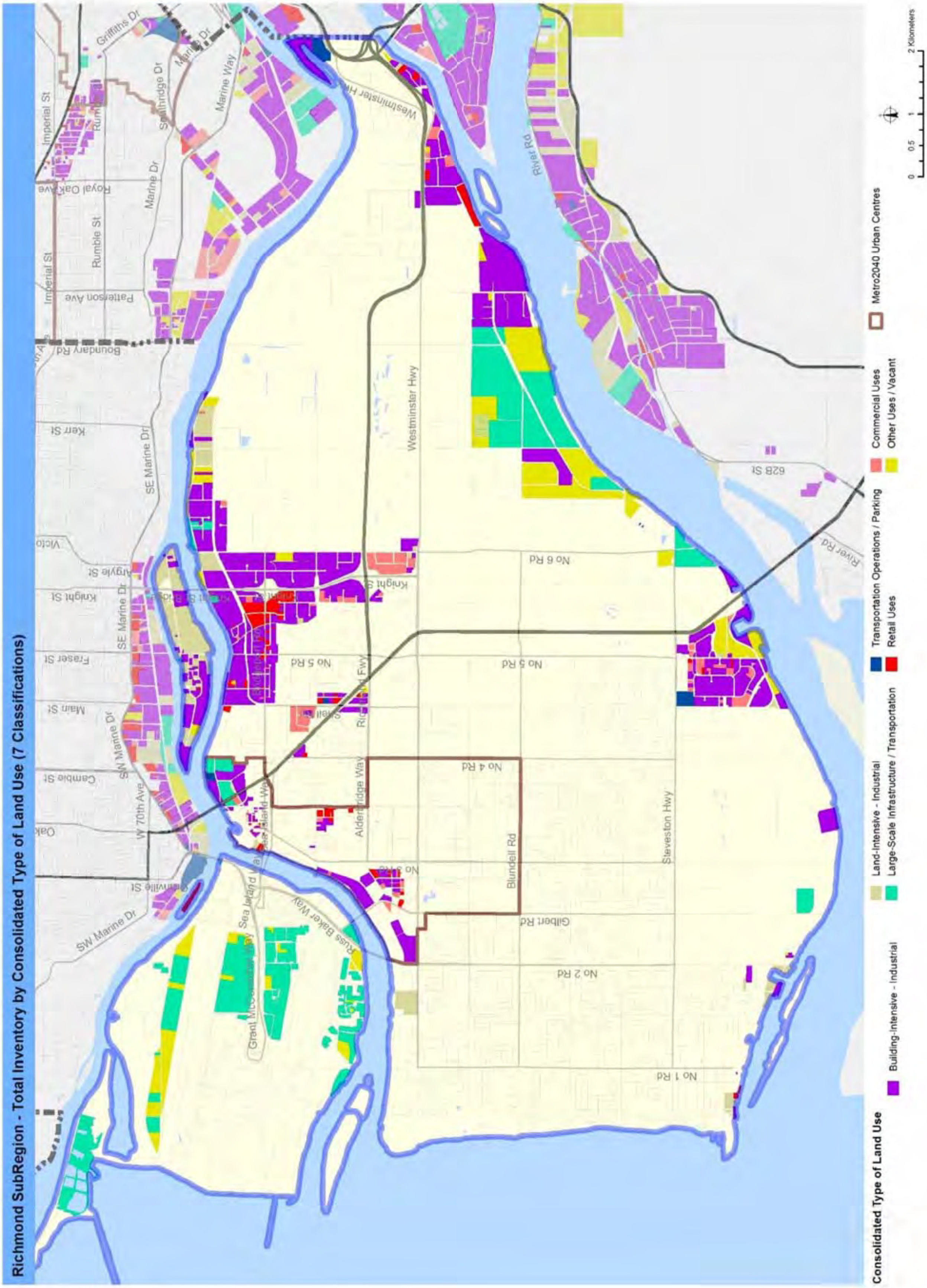
Non-Industrial - Banquet Hall / Assembly
Non-Industrial - Education / Training
Maintenance Yards / Operations Services
Infrastructure – Oil Tank Farm
Infrastructure - Utilities
Transportation - Operations
Transportation - Parking
Transportation infrastructure - Rail Yards
Transportation infrastructure - Port Terminal Developed*
Transportation infrastructure - Port Terminal Vacant*
Transportation infrastructure - YVR Airside / Groundside Developed*
Transportation infrastructure - YVR Airside / Groundside Vacant*
Transportation infrastructure - Airports Airside / Groundside Developed*
Transportation infrastructure - Airports Airside / Groundside Vacant*
Vacant Land

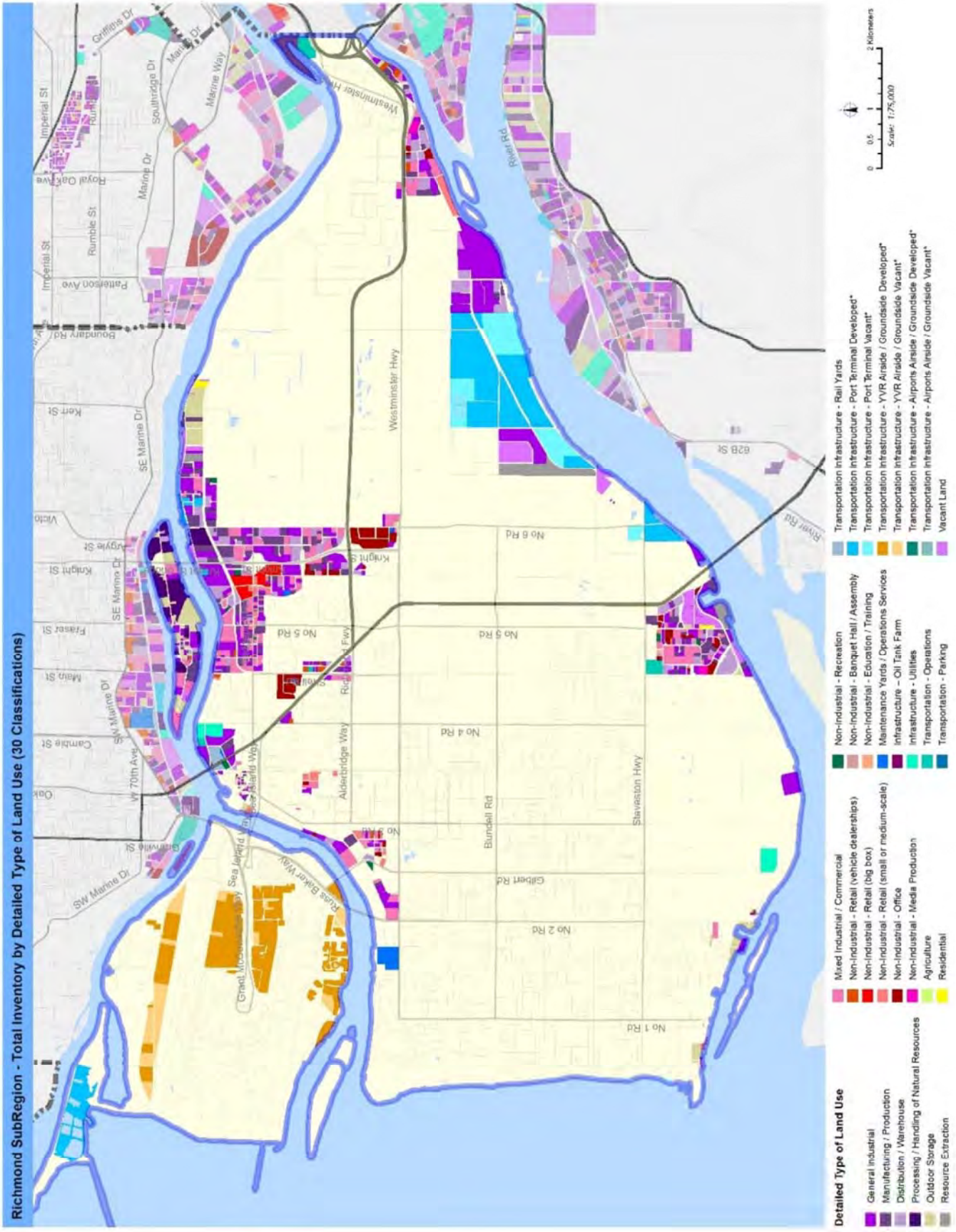

Northeast Sector SubRegion - Total Inventory by Consolidated Type of Land Use (7 Classifications)
Dewdney Trunk Rd
Harris Rd
Prairie Ave
Plateau Blvd
Manner Way
Austin Ave
Como Lake Ave
Dawes Hill Rd
Blue Mountain St
North Rd
Broadway
Gaglardi Way
Loco Rd
Clarke Rd
Brunette Ave
Braid St
E Columbia St
Hope Ave
E 6th Ave
Scale: 1:75,000
Consolidated Type of Land Use
Metro2040 Urban Centres
Commercial Uses
Other Uses / Vacant
Transportation Operations / Parking
Retail Uses
Land-Intensive - Industrial
Large-Scale Infrastructure / Transportation
Building-Intensive - Industrial

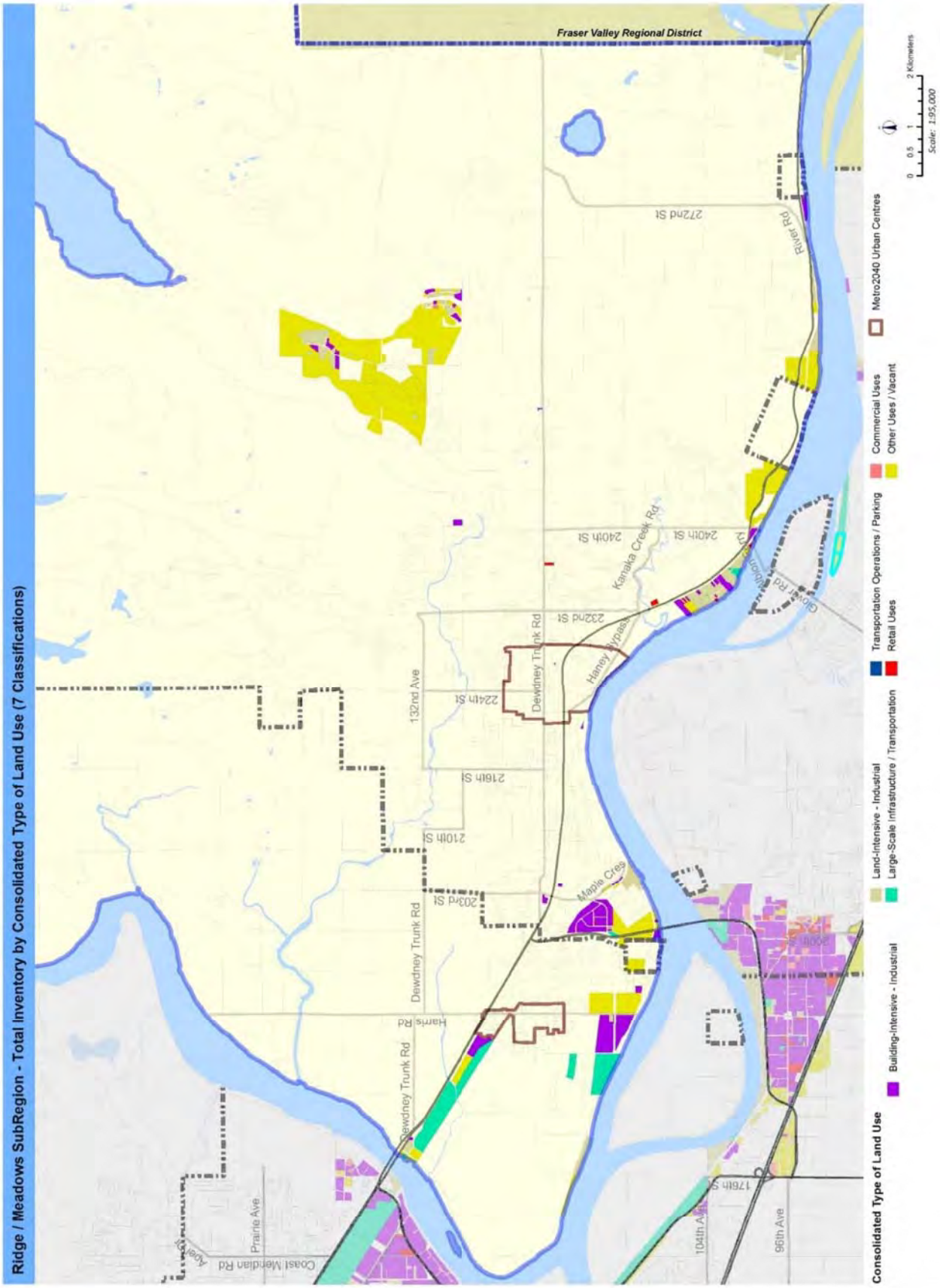

Northeast Sector SubRegion - Total Inventory by Detailed Type of Land Use (30 Classifications)
Detailed Type of Land Use
General industrial
Manufacturing / Production
Distribution / Warehouse
Processing / Handling of Natural Resources
Outdoor Storage
Resource Extraction
Mixed Industrial / Commercial
Non-Industrial - Retail (vehicle dealerships)
Non-Industrial - Retail (big box)
Non-Industrial - Retail (small or medium-scale)
Non-Industrial - Office
Non-Industrial - Media Production
Agriculture
Residential
Non-Industrial - Recreation
Non-Industrial - Banquet Hall / Assembly
Non-Industrial - Education / Training
Maintenance Yards / Operations Services
Infrastructure – Oil Tank Farm
Infrastructure - Utilities
Transportation - Operations
Transportation - Parking
Transportation Infrastructure - Rail Yards
Transportation Infrastructure - Port Terminal Developed*
Transportation Infrastructure - Port Terminal Vacant*
Transportation Infrastructure - YVR Airside / Groundside Developed*
Transportation Infrastructure - YVR Airside / Groundside Vacant*
Transportation Infrastructure - Airports Airside / Groundside Developed*
Transportation Infrastructure - Airports Airside / Groundside Vacant*
Vacant Land
Scale: 1:75,000
0
0.5
1
2 Kilometers
Dewdney Trunk Rd
Harris Rd
Prairie Ave
Shaughnessy St
Plateau Blvd
Johnson St
Manner Way
Como Lake Ave
Austin Ave
Dawes Hill Rd
Blue Mountain St
Clarke Rd
Broadway
North Rd
Gaglardi Way
Holdom Ave
Braid St
E Columbia St
Joco Rd
Pitt River Rd

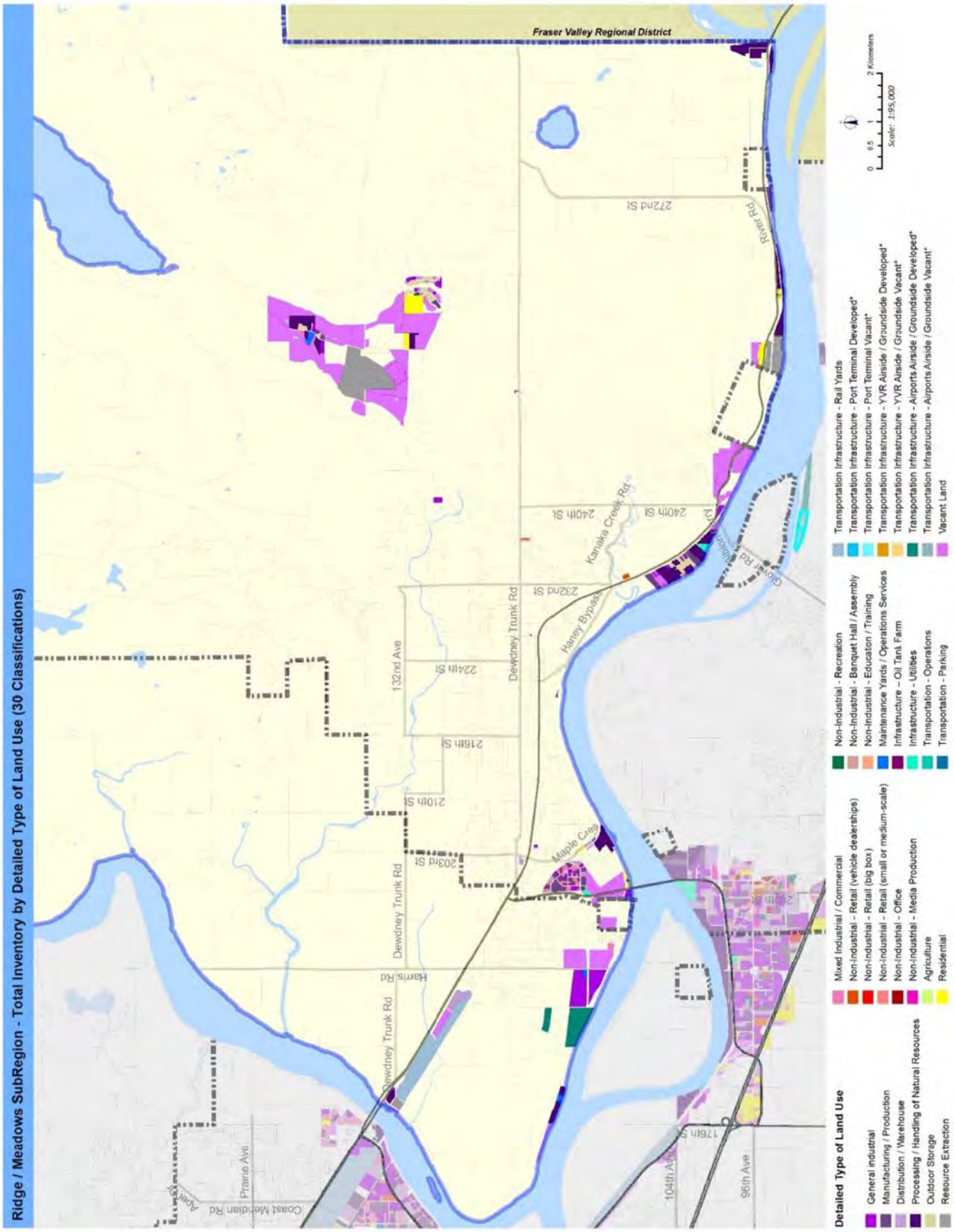

North Shore SubRegion - Total Inventory by Consolidated Type of Land Use (7 Classifications)
Consolidated Type of Land Use
Building-Intensive - Industrial
Land-Intensive - Industrial
Large-Scale Infrastructure / Transportation
Transportation Operations / Parking
Retail Uses
Commercial Uses
Other Uses / Vacant
Metro2040 Urban Centres
Scale: 1:65,000
2 Kilometers

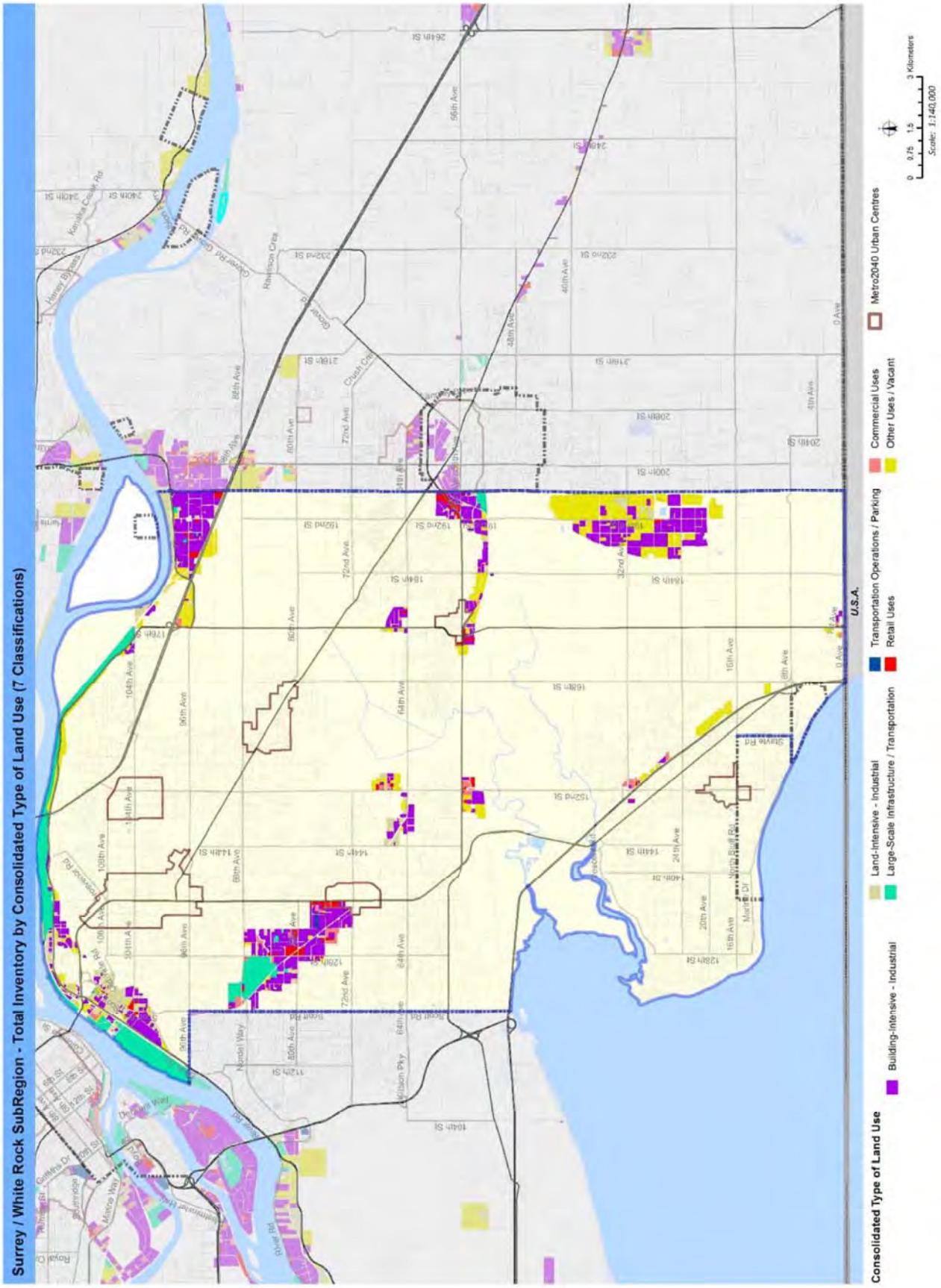

North Shore SubRegion - Total Inventory by Detailed Type of Land Use (30 Classifications)
Deep Cove Rd
Dollarton Hwy
Mt Seymour Pky
Dempsey Rd
Lynn Valley Rd
Mountain Hwy
E Keith Rd
E 3rd St
E 29th St
E 13th St
Grand Blvd
Lonsdale Ave
W Queens Rd
Delbrook Ave
Highland Blvd
Montroyal Blvd
Westview Dr
W 16th St
W Keith Rd
W 3rd St
Capilano Rd
Capilano Rd
Stevens Dr
Southborough Dr
Mathers Ave
Burley Dr
Marine Dr
15th St
McGill St
Dundas St
Powell St
Boundary Rd
Hastings St
Renfrew St
Rupert St
Gilmore Ave
Broadway
Commercial St
Nanaimo St
Victoria Dr
Kootenay St
Davie St
Denman St
Detailed Type of Land Use
General Industrial
Manufacturing / Production
Distribution / Warehouse
Processing / Handling of Natural Resources
Outdoor Storage
Resource Extraction
Mixed Industrial / Commercial
Non-Industrial - Retail (vehicle dealerships)
Non-Industrial - Retail (big box)
Non-Industrial - Retail (small or medium-scale)
Non-Industrial - Office
Non-Industrial - Media Production
Agriculture
Residential
Non-Industrial - Recreation
Non-Industrial - Banquet Hall / Assembly
Non-Industrial - Education / Training
Maintenance Yards / Operations Services
Infrastructure – Oil Tank Farm
Infrastructure - Utilities
Transportation - Operations
Transportation - Parking
Transportation Infrastructure - Rail Yards
Transportation Infrastructure - Port Terminal Developed*
Transportation Infrastructure - Port Terminal Vacant*
Transportation Infrastructure - YVR Airside / Groundside Developed*
Transportation Infrastructure - YVR Airside / Groundside Vacant*
Transportation Infrastructure - Airports Airside / Groundside Developed*
Transportation Infrastructure - Airports Airside / Groundside Vacant*
Vacant Land
0
0.5
1
2 Kilometers
Scale: 1:65,000

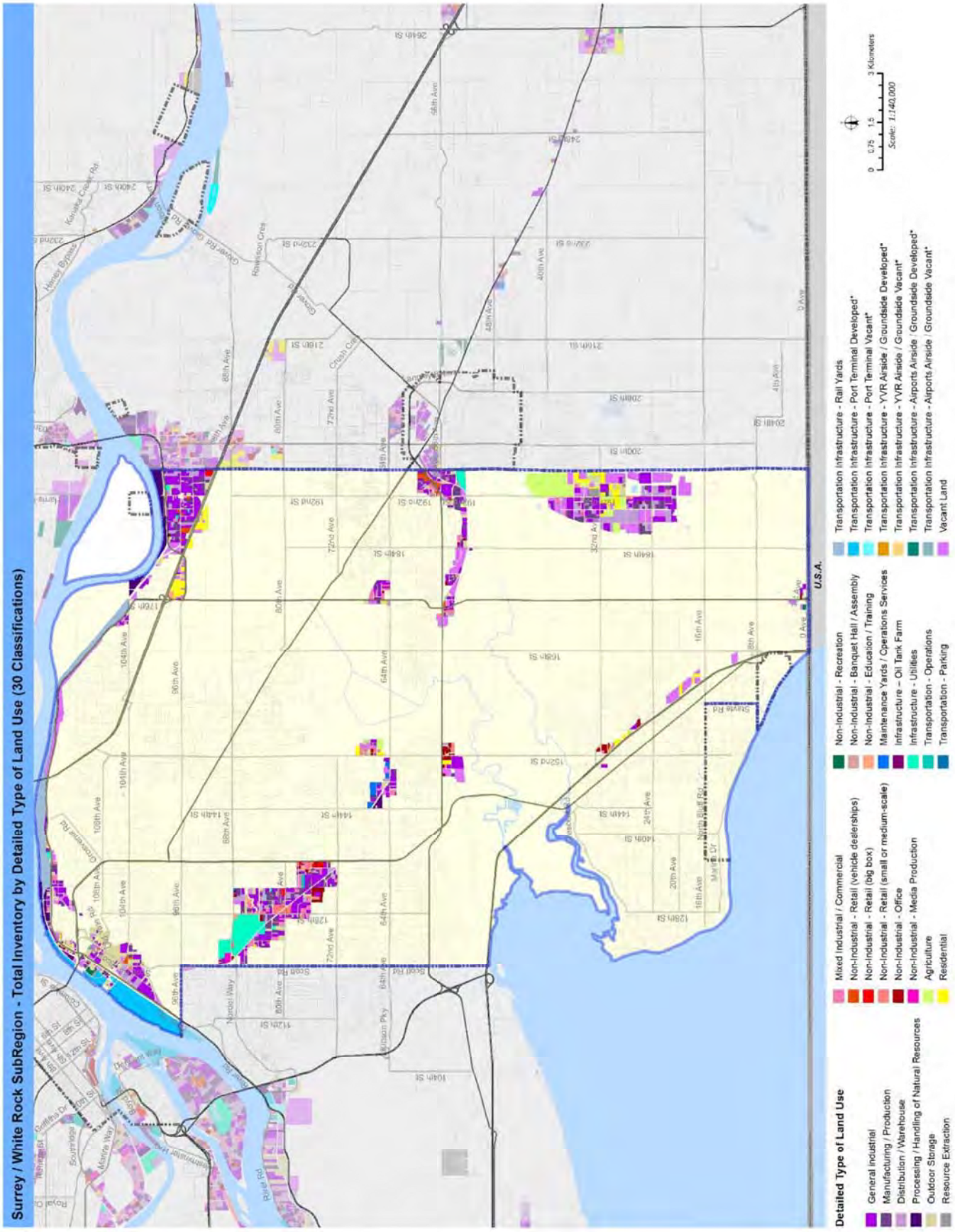

Richmond SubRegion - Total Inventory by Consolidated Type of Land Use (7 Classifications)
Consolidated Type of Land Use
Building-Intensive - Industrial
Land-Intensive - Industrial
Large-Scale Infrastructure / Transportation
Transportation Operations / Parking
Retail Uses
Commercial Uses
Other Uses / Vacant
Metro2040 Urban Centres
Scale: 1:75,000
2 Kilometers

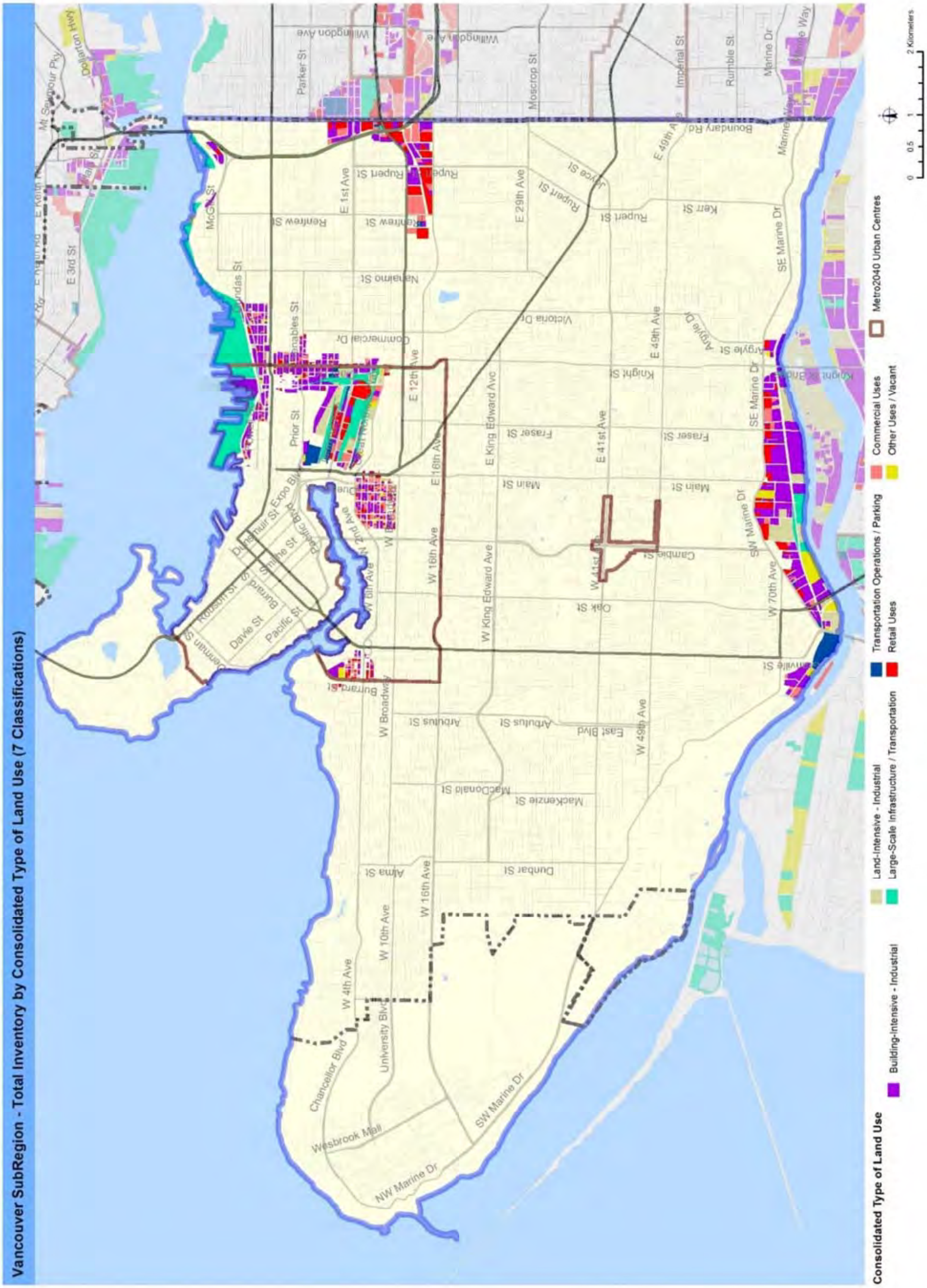

Richmond SubRegion - Total Inventory by Detailed Type of Land Use (30 Classifications)
Griffiths Dr
Imperial St
Southridge Dr
Marine Dr
Marine Way
Westminster Hwy
River Rd
Royal Oak Ave
Rumble St
Patterson Ave
Boundary Rd
Kent St
SE Marine Dr
Knight St
Fraser St
Main St
Cambie St
SW Marine Dr
Gilbert Rd
No 6 Rd
No 5 Rd
No 4 Rd
No 3 Rd
No 2 Rd
No 1 Rd
Alderbridge Way
Blundell Rd
Steveston Hwy
Russ Baker Way
Grant Mcconachie Way
Sea Island Way
0 0.5 1 2 Kilometers
Scale: 1:75,000
Detailed Type of Land Use
General Industrial
Manufacturing / Production
Distribution / Warehouse
Processing / Handling of Natural Resources
Outdoor Storage
Resource Extraction
Mixed Industrial / Commercial
Non-Industrial - Retail (vehicle dealerships)
Non-Industrial - Retail (big box)
Non-Industrial - Retail (small or medium-scale)
Non-Industrial - Office
Non-Industrial - Media Production
Agriculture
Residential
Non-Industrial - Recreation
Non-Industrial - Banquet Hall / Assembly
Non-Industrial - Education / Training
Maintenance Yards / Operations Services
Infrastructure - Oil Tank Farm
Infrastructure - Utilities
Transportation - Operations
Transportation - Parking
Transportation Infrastructure - Rail Yards
Transportation Infrastructure - Port Terminal Developed*
Transportation Infrastructure - Port Terminal Vacant*
Transportation Infrastructure - YVR Airside / Groundside Developed*
Transportation Infrastructure - YVR Airside / Groundside Vacant*
Transportation Infrastructure - Airports Airside / Groundside Developed*
Transportation Infrastructure - Airports Airside / Groundside Vacant*
Vacant Land

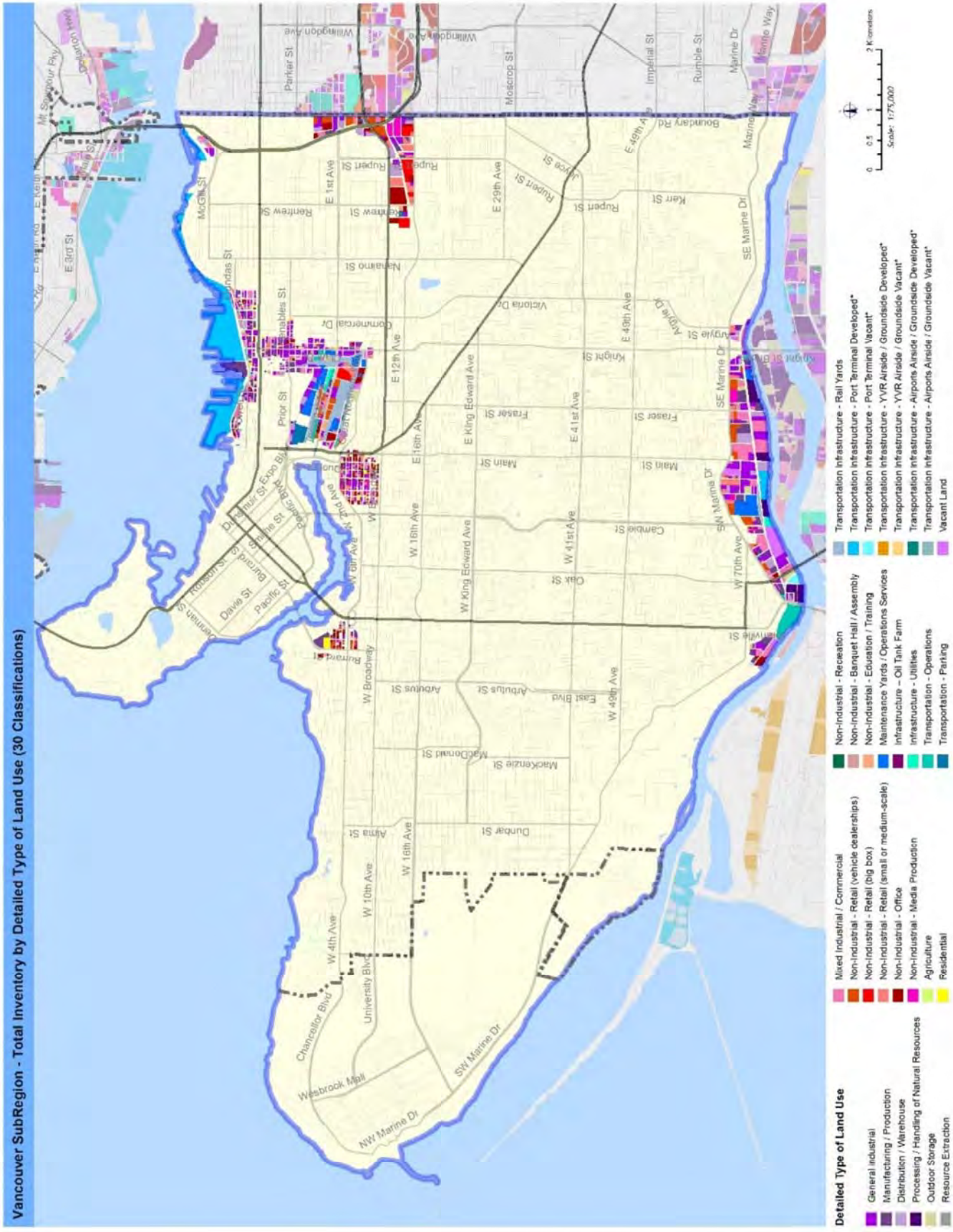

Ridge / Meadows SubRegion - Total Inventory by Consolidated Type of Land Use (7 Classifications)
Fraser Valley Regional District
Consolidated Type of Land Use
Building-Intensive - Industrial
Land-Intensive - Industrial
Large-Scale Infrastructure / Transportation
Transportation Operations / Parking
Retail Uses
Commercial Uses
Other Uses / Vacant
Metro2040 Urban Centres
Scale: 1:95,000
0 0.5 1 2 Kilometers
272nd St
River Rd
240th St
Kanaka Creek Rd
232nd St
Dewdney Trunk Rd
Haney Bypass
132nd Ave
224th St
216th St
210th St
203rd St
Maple Crest
Harris Rd
Coast Meridian Rd
Prairie Ave
104th Ave
96th Ave


Ridge / Meadows SubRegion - Total Inventory by Detailed Type of Land Use (30 Classifications)
Fraser Valley Regional District
Fraser River
272nd St
240th St
232nd St
224th St
216th St
210th St
203rd St
176th St
Kanaka Creek Rd
Dewdney Trunk Rd
Haney Bypass
132nd Ave
104th Ave
96th Ave
Prairie Ave
Coast Meridian Rd
Harris Rd
Maple Crest
0 0.5 1 2 Kilometers
Scale: 1:95,000
Detailed Type of Land Use
General Industrial
Manufacturing / Production
Distribution / Warehouse
Processing / Handling of Natural Resources
Outdoor Storage
Resource Extraction
Mixed Industrial / Commercial
Non-Industrial - Retail (vehicle dealerships)
Non-Industrial - Retail (big box)
Non-Industrial - Retail (small or medium-scale)
Non-Industrial - Office
Non-Industrial - Media Production
Agriculture
Residential
Non-Industrial - Recreation
Non-Industrial - Banquet Hall / Assembly
Non-Industrial - Education / Training
Maintenance Yards / Operations Services
Infrastructure - Oil Tank Farm
Infrastructure - Utilities
Transportation - Operations
Transportation - Parking
Transportation Infrastructure - Rail Yards
Transportation Infrastructure - Port Terminal Developed*
Transportation Infrastructure - Port Terminal Vacant*
Transportation Infrastructure - YVR Airside / Groundside Developed*
Transportation Infrastructure - YVR Airside / Groundside Vacant*
Transportation Infrastructure - Airports Airside / Groundside Developed*
Transportation Infrastructure - Airports Airside / Groundside Vacant*
Vacant Land


Surrey / White Rock SubRegion - Total Inventory by Consolidated Type of Land Use (7 Classifications)
U.S.A.
Consolidated Type of Land Use
Building-Intensive - Industrial
Land-Intensive - Industrial
Large-Scale Infrastructure / Transportation
Transportation Operations / Parking
Retail Uses
Commercial Uses
Other Uses / Vacant
Metro2040 Urban Centres
0 0.75 1.5 3 Kilometers
Scale: 1:140,000


Surrey / White Rock SubRegion - Total Inventory by Detailed Type of Land Use (30 Classifications)
U.S.A.
0 0.75 1.5 3 Kilometers
Scale: 1:140,000
Detailed Type of Land Use
General industrial
Manufacturing / Production
Distribution / Warehouse
Processing / Handling of Natural Resources
Outdoor Storage
Resource Extraction
Mixed Industrial / Commercial
Non-Industrial - Retail (vehicle dealerships)
Non-Industrial - Retail (big box)
Non-Industrial - Retail (small or medium-scale)
Non-Industrial - Office
Non-Industrial - Media Production
Agriculture
Residential
Non-Industrial - Recreation
Non-Industrial - Banquet Hall / Assembly
Non-Industrial - Education / Training
Maintenance Yards / Operations Services
Infrastructure – Oil Tank Farm
Infrastructure - Utilities
Transportation - Operations
Transportation - Parking
Transportation Infrastructure - Rail Yards
Transportation Infrastructure - Port Terminal Developed*
Transportation Infrastructure - Port Terminal Vacant*
Transportation Infrastructure - YVR Airside / Groundside Developed*
Transportation Infrastructure - YVR Airside / Groundside Vacant*
Transportation Infrastructure - Airports Airside / Groundside Developed*
Transportation Infrastructure - Airports Airside / Groundside Vacant*
Vacant Land


Vancouver SubRegion - Total Inventory by Consolidated Type of Land Use (7 Classifications)
Consolidated Type of Land Use
Building-intensive - Industrial
Land-Intensive - Industrial
Large-Scale Infrastructure / Transportation
Transportation Operations / Parking
Retail Uses
Commercial Uses
Other Uses / Vacant
Metro2040 Urban Centres
0 0.5 1 2 Kilometers
Scale: 1:75,000


Vancouver SubRegion - Total Inventory by Detailed Type of Land Use (30 Classifications)
Detailed Type of Land Use
General Industrial
Manufacturing / Production
Distribution / Warehouse
Processing / Handling of Natural Resources
Outdoor Storage
Resource Extraction
Mixed Industrial / Commercial
Non-Industrial - Retail (vehicle dealerships)
Non-Industrial - Retail (big box)
Non-Industrial - Retail (small or medium-scale)
Non-Industrial - Office
Non-Industrial - Media Production
Agriculture
Residential
Non-Industrial - Recreation
Non-Industrial - Banquet Hall / Assembly
Non-Industrial - Education / Training
Maintenance Yards / Operations Services
Infrastructure – Oil Tank Farm
Infrastructure - Utilities
Transportation - Operations
Transportation - Parking
Transportation Infrastructure - Rail Yards
Transportation Infrastructure - Port Terminal Developed*
Transportation Infrastructure - Port Terminal Vacant*
Transportation Infrastructure - YVR Airside / Groundside Developed*
Transportation Infrastructure - YVR Airside / Groundside Vacant*
Transportation Infrastructure - Airports Airside / Groundside Developed*
Transportation Infrastructure - Airports Airside / Groundside Vacant*
Vacant Land
Scale: 1:75,000
0
0.5
1
2 Kilometers
Boundary Rd
Marine Way
Imperial St
Rumble St
Marine Dr
Moscrop St
Parker St
Willingdon Ave
E 1st Ave
E 3rd St
E 29th Ave
E 49th Ave
Rupert St
Kerr St
SE Marine Dr
Nanaimo St
Commercial Dr
Victoria Dr
Prior St
E 12th Ave
E 16th Ave
E King Edward Ave
Fraser St
E 41st Ave
Main St
Knight St
Argyle St
Cambie St
Oak St
W 16th Ave
W King Edward Ave
W 41st Ave
W 70th Ave
SW Marine Dr
Arbutus St
W Broadway
W 49th Ave
MacDonald St
MacKenzie St
Dunbar St
Alma St
W 10th Ave
W 4th Ave
University Blvd
Chancellor Blvd
Wesbrook Mall
NW Marine Dr
Burrard St
Davie St
Pacific St
Denman St
Robson St
Granville St
Howe St
Seymour St
Dunsmuir St
Pender St
Hastings St
Cordova St
Georgia St
Expo Blvd
Quebec St
Main St
Ontario St
Manitoba St
Ash St
Cambie Bridge
Oak St Bridge
Arthur Laing Bridge
Knight St Bridge
Boundary Bay
Mt Seymour Pkwy
Dollarton Hwy
McGill St

Appendix 2: Inventory Tables – Consolidated Land Use Classification

Table A2.1: Consolidated Land Use Classification by Sub-Region

	Burnaby / New West	Delta/TFN	Langleys	North Shore	Northeast Sector	Richmond	Ridge / Meadows	Surrey / White Rock	Vancouver	Total
Building - Industrial	597	783	605	110	445	707	124	1,029	239	4,639
Land - Industrial	78	120	85	16	82	136	138	264	55	975
Large-Scale Infras / Transp	380	397	44	244	565	490	101	462	155	2,839
Transp Opts / Parking	23	5		5	9	17		5	26	90
Retail	89	29	46	10	39	53	3	84	85	439
Commercial	133	8	40	14	12	68	1	74	57	406
Other / Vacant	42	313	176	21	56	271	593	616	27	2,115
Total	**1,342**	**1,655**	**996**	**420**	**1,209**	**1,741**	**960**	**2,534**	**644**	**11,502**

Table A2.2: Consolidated Land Use Classification by Regional Designation

RGS Designation	Con Rec	Rural	Agricultural	General Urban	Mixed Emp	Industrial	Total
Building - Industrial	3	7	9	307	1,278	3,035	4,639
Land - Industrial	1	11		109	152	701	975
Large-Scale Infras / Transp	114		10	211	53	2,451	2,839
Transp Opts / Parking	1		0	18	11	61	90
Retail	0			74	222	142	439
Commercial		1		38	256	112	406
Other / Vacant		183	31	125	597	1,179	2,115
Total	**119**	**202**	**50**	**880**	**2,569**	**7,681**	**11,502**

Table A2.3: Consolidated Land Use Classification by Land Ownership Type

	Private	Private - Railway	Crown Corporatio	Public - Federal	Public - Provincial	Public - Muni/Reg	First Nations	Total
Building - Industrial	4,443	17	29	49	8	93		4,639
Land - Industrial	808	2	13	20	20	110		975
Large-Scale Infras / Transp	729	462	198	1,270	2	178		2,839
Transp Opts / Parking	20				12	58		90
Retail	425			6	0	8		439
Commercial	383		7	3	2	12		406
Other / Vacant	1,312	16	22	237	115	374	40	2,115
Total	**8,121**	**498**	**269**	**1,584**	**159**	**832**	**40**	**11,502**

Appendix 3: Inventory Tables – Detailed Land Use Classification

Table A3.1: Detailed Land Use Classification

	Land HA	Land AC	% of Total Lands
Building-Intensive - Industrial	**4,639**	**11,463**	**40%**
General Industrial	1,914	4,729	17%
Mixed Industrial / Commercial	643	1,589	6%
Manufacturing / Production	1,060	2,620	9%
Distribution / Warehouse	1,022	2,524	9%
Land-Intensive - Industrial	**975**	**2,408**	**8%**
Processing / Handling of Natural Resources	387	956	3%
Outdoor Storage	461	1,138	4%
Maintenance Yards / Operations Services	127	314	1%
Large-Scale Infras / Transp	**2,839**	**7,015**	**25%**
Infrastructure - Utilities	332	819	3%
Infrastructure - Oil Tank Farm	631	1,560	5%
Transp Infras - Rail Yards	530	1,309	5%
Transp Infras - YVR Airside / Groundside Developed	200	494	2%
Transp Infras - Airports Developed (excluding YVR)	76	188	1%
Transp Infras - Port Terminal Developed	1,070	2,645	9%
Transp Infras - Operations / Parking	**90**	**222**	**1%**
Transportation - Operations	78	192	1%
Transportation - Parking	12	30	0%
Retail Uses	**439**	**1,084**	**4%**
Non-Industrial - Retail (big box)	80	198	1%
Non-Industrial - Retail (small or medium-scale)	217	536	2%
Non-Industrial - Retail (vehicle dealerships)	141	349	1%
Commercial Uses	**406**	**1,003**	**4%**
Non-Industrial - Office	258	637	2%
Non-Industrial - Media Production	82	203	1%
Non-Industrial - Banquet Hall / Assembly	20	51	0%
Non-Industrial - Education / Training	19	46	0%
Non-Industrial - Recreation	27	67	0%
Other Uses / Vacant	**2,115**	**5,226**	**18%**
Agriculture	139	344	1%
Residential	223	551	2%
Resource Extraction	232	574	2%
Transp Infras - Airports Vacant (excluding YVR)	31	78	0%
Transp Infras - YVR Airside / Groundside Vacant	62	154	1%
Transp Infras - Port Terminal Vacant	118	291	1%
Vacant Land	1,309	3,235	11%
Total	**11,502**	**28,421**	**100%**

Table A3.2: Number of Sites and Average Site Size by Detailed Land Use Classification

	Number of Sites	Land HA	Avg Site Size HA	Land AC	Avg Site Size AC
Building-Intensive - Industrial	5,122	4,639	0.9	11,463	2.2
General Industrial	2,547	1,914	0.8	4,729	1.9
Mixed Industrial / Commercial	730	643	0.9	1,589	2.2
Manufacturing / Production	1,153	1,060	0.9	2,620	2.3
Distribution / Warehouse	692	1,022	1.5	2,525	3.6
Land-Intensive - Industrial	648	975	1.5	2,408	3.7
Processing / Handling of Natural Resources	95	387	4.1	956	10.1
Outdoor Storage	482	461	1.0	1,138	2.4
Maintenance Yards / Operations Services	71	127	1.8	314	4.4
Large-Scale Infras / Transp	429	2,839	6.6	7,015	16.4
Infrastructure - Utilities	90	332	3.7	819	9.1
Infrastructure - Oil Tank Farm	12	631	52.6	1,560	130.0
Transp Infras - Rail Yards	37	530	14.3	1,310	35.4
Transp Infras - YVR Airside / Groundside Developed	86	200	2.3	494	5.7
Transp Infras - Airports Developed (excluding YVR)	63	76	1.2	188	3.0
Transp Infras - Port Terminal Developed	141	1,070	7.6	2,645	18.8
Transp Infras - Operations / Parking	63	90	1.4	222	3.5
Transportation - Operations	35	78	2.2	192	5.5
Transportation - Parking	28	12	0.4	30	1.1
Retail Uses	629	439	0.7	1,084	1.7
Non-Industrial - Retail (big box)	28	80	2.9	198	7.1
Non-Industrial - Retail (small or medium-scale)	412	217	0.5	536	1.3
Non-Industrial - Retail (vehicle dealerships)	189	141	0.7	349	1.8
Commercial Uses	583	406	0.7	1,003	1.7
Non-Industrial - Office	373	258	0.7	637	1.7
Non-Industrial - Media Production	110	82	0.7	203	1.8
Non-Industrial - Banquet Hall / Assembly	44	20	0.5	51	1.1
Non-Industrial - Education / Training	24	19	0.8	46	1.9
Non-Industrial - Recreation	32	27	0.9	67	2.1
Other Uses / Vacant	1,095	2,115	1.9	5,226	4.8
Agriculture	24	139	5.8	344	14.3
Residential	493	223	0.5	551	1.1
Resource Extraction	19	232	12.2	574	30.2
Transp Infras - Airports Vacant (excluding YVR)	21	62	3.0	154	7.3
Transp Infras - YVR Airside / Groundside Vacant	8	31	3.9	78	9.7
Transp Infras - Port Terminal Vacant	27	118	4.4	291	10.8
Vacant Land	503	1,309	2.6	3,235	6.4
Total	**8,569**	**11,502**	**1.3**	**28,422**	**3.3**

Table A3.3: Detailed Land Use Classification by Sub-Region

	Burnaby / New West	Delta/TFN	Langleys	North Shore	Northeast Sector	Richmond	Ridge / Meadows	Surrey / White Rock	Vancouver	Total
Building-Intensive - Industrial	597	783	605	110	445	707	124	1,029	239	4,639
General Industrial	223	211	226	43	181	309	60	559	100	1,914
Mixed Industrial / Commercial	112	73	40	33	81	151	14	88	52	643
Manufacturing / Production	130	212	136	33	138	139	34	188	51	1,060
Distribution / Warehouse	131	288	203	1	45	109	15	194	36	1,022
Land-Intensive - Industrial	78	120	85	16	82	136	138	264	55	975
Processing / Handling of Natural Resources	14	36	46	12	30	50	109	73	17	387
Outdoor Storage	48	81	28	1	26	72	22	174	8	461
Maintenance Yards / Operations Services	16	3	11	4	26	14	6	17	30	127
Large-Scale Infrastructure / Transportation	380	397	44	244	565	490	101	462	155	2,839
Infrastructure - Utilities	48	95	18	20	4	19	4	119	5	332
Infrastructure - Oil Tank Farm	260			3	369					631
Transp Infras - Rail Yards	34	6		56	150	7	61	181	36	530
Transp Infras - YVR Airside / Groundside Developed						200				200
Transp Infras - Airports Develcped (excluding YVR)		14	26				36			76
Transp Infras - Port Terminal Developed	39	282		166	43	264		162	115	1,070
Transp Infra - Operations / Parking	23	5		5	9	17		5	26	90
Transportation - Operations	21	5		4	9	17		4	18	78
Transportation - Parking	2			1	1			1	8	12
Retail	89	29	46	10	39	53	3	84	85	439
Non-Industrial - Retail (big box)	19			3	12	18		14	15	80
Non-Industrial - Retail (small or medium-scale)	36	12	35	4	19	26	2	45	37	217
Non-Industrial - Retail (vehicle dealerships)	34	17	12	2	8	9	1	25	33	141
Commercial	133	8	40	14	12	68	1	74	57	406
Non-Industrial - Office	90	3	17	4	8	53		45	36	258
Non-Industrial - Media Production	40	1	8	7	1	5		6	15	82
Non-Industrial - Banquet Hall / Assembly	1		6	0	2	2		6	3	20
Non-Industrial - Education / Training	0	3	2	0		1		10	3	19
Non-Industrial - Recreation	2	0	7	2	1	6	1	7	1	27
Other / Vacant	42	313	176	21	56	271	593	616	27	2,115
Agriculture	0		4					135		139
Residential	5	1	74	1	2	4	27	102	6	223
Resource Extraction		66		1	5	41	106	13		232
Transp Infras - YVR Airside / Groundside Vacant						62				62
Transp Infras - Airports Vacant (excluding YVR)		21	10							31
Transp Infras - Port Terminal Vacant	4	12		1		97		1	3	118
Vacant Land	33	212	88	18	48	66	460	365	18	1,309
Total	1,342	1,655	996	420	1,209	1,741	960	2,534	644	11,502

Table A3.4: Detailed Land Use Classification by Regional Designation

	Con Rec	Rural	Agricultural	General Urban	Mixed Emp	Industrial	Total
Building-Intensive - Industrial	**3**	**7**	**9**	**307**	**1,278**	**3,035**	**4,639**
General Industrial	1	5	2	147	488	1,271	1,914
Mixed Industrial / Commercial	1			62	247	333	643
Manufacturing / Production	1	2	6	63	276	714	1,060
Distribution / Warehouse		1	1	34	267	718	1,022
Land-Intensive - Industrial	**1**	**11**		**109**	**152**	**701**	**975**
Processing / Handling of Natural Resources	1			26	13	347	387
Outdoor Storage		11		56	113	281	461
Maintenance Yards / Operations Services	0			28	26	73	127
Large-Scale Infras / Transp	**114**		**10**	**211**	**53**	**2,451**	**2,839**
Infrastructure - Utilities			10	53	10	259	332
Infrastructure - Oil Tank Farm				84	15	533	631
Transp Infras - Rail Yards				25	5	499	530
Transp Infras - YVR Airside / Groundside Developed	2					198	200
Transp Infras - Airports Developed (excluding YVR)				36	14	26	76
Transp Infras - Port Terminal Developed	112			13	9	936	1,070
Transp Infras - Operations / Parking	**1**		**0**	**18**	**11**	**61**	**90**
Transportation - Operations			0	16	4	58	78
Transportation - Parking	1			1	7	3	12
Retail Uses	**0**			**74**	**222**	**142**	**439**
Non-Industrial - Retail (big box)				5	67	8	80
Non-Industrial - Retail (small or medium-scale)	0			44	110	62	217
Non-Industrial - Retail (vehicle dealerships)				24	45	72	141
Commercial Uses		**1**		**38**	**256**	**112**	**406**
Non-Industrial - Office				13	195	50	258
Non-Industrial - Media Production				10	42	31	82
Non-Industrial - Banquet Hall / Assembly				2	7	12	20
Non-Industrial - Education / Training				3	3	12	19
Non-Industrial - Recreation		1		11	10	6	27
Other Uses / Vacant		**183**	**31**	**125**	**597**	**1,179**	**2,115**
Agriculture					133	6	139
Residential		19		42	115	47	223
Resource Extraction		9		5	18	200	232
Transp Infras - Airports Vacant (excluding YVR)					21	10	31
Transp Infras - YVR Airside / Groundside Vacant						62	62
Transp Infras - Port Terminal Vacant				8		109	118
Vacant Land		154	31	69	310	744	1,309
Total	**119**	**202**	**50**	**880**	**2,569**	**7,681**	**11,502**

Table A3.5: Detailed Land Use Classification by Land Ownership Type

	Private	Railway	Crown Corp	Public - Federal	Public - Provincial	Public - Muni/Reg	First Nations	Total
Building-Intensive - Industrial	4,443	17	29	49	8	93		4,639
General Industrial	1,834	1	17	17	3	41		1,914
Mixed Industrial / Commercial	633		1	1	0	7		643
Manufacturing / Production	1,008	1	11	25	1	16		1,060
Distribution / Warehouse	968	15	0	6	4	28		1,022
Land-Intensive - Industrial	808	2	13	20	20	110		975
Processing / Handling of Natural Resources	382					5		387
Outdoor Storage	410	2	8	20	11	9		461
Maintenance Yards / Operations Services	17		5		9	96		127
Large-Scale Infras / Transp	729	462	198	1,270	2	178		2,839
Infrastructure - Utilities	20		198		1	112		332
Infrastructure - Oil Tank Farm	631							631
Transp Infras - Rail Yards	56	462			1	11		530
Transp Infras - YVR Airside / Groundside Developed				200				200
Transp Infras - Airports Developed (excluding YVR)	21					55		76
Transp Infras - Port Terminal Developed				1,070				1,070
Transp Infras - Operations / Parking	20				12	58		90
Transportation - Operations	11				10	56		78
Transportation - Parking	9				1	2		12
Retail Uses	425			6	0	8		439
Non-Industrial - Retail (big box)	80							80
Non-Industrial - Retail (small or medium-scale)	204			6	0	7		217
Non-Industrial - Retail (vehicle dealerships)	141					0		141
Commercial Uses	383		7	3	2	12		406
Non-Industrial - Office	242		6	3	0	7		258
Non-Industrial - Media Production	81		1			1		82
Non-Industrial - Banquet Hall / Assembly	20					1		20
Non-Industrial - Education / Training	17				2			19
Non-Industrial - Recreation	24					3		27
Other Uses / Vacant	1,312	16	22	237	115	374	40	2,115
Agriculture	86			53				139
Residential	206				1	16		223
Resource Extraction	219	4	8		1			232
Transp Infras - Airports Vacant (excluding YVR)				62				62
Transp Infras - YVR Airside / Groundside Vacant	10					21		31
Transp Infras - Port Terminal Vacant				118				118
Vacant Land	791	12	14	3	113	337	40	1,309
Total	**8,121**	**498**	**269**	**1,584**	**159**	**832**	**40**	**11,502**

Appendix 4: Inventory Tables – Sub-Regional Distribution

Table A4.1: Sub-Regional Distribution by Consolidated Land Use Classification

	Building - Industrial	Land - Industrial	Large-Scale Infras / Transp	Transport Opts / Parking	Retail	Commercial	Other / Vacant	Total
Burnaby / New West	597	78	380	23	89	133	42	1,342
Delta/TFN	783	120	397	5	29	8	313	1,655
Langleys	605	85	44		46	40	176	996
North Shore	110	16	244	5	10	14	21	420
Northeast Sector	445	82	565	9	39	12	56	1,209
Richmond	707	136	490	17	53	68	271	1,741
Ridge / Meadows	124	138	101		3	1	593	960
Surrey / White Rock	1,029	264	462	5	84	74	616	2,534
Vancouver	239	55	155	26	85	57	27	644
Total	**4,639**	**975**	**2,839**	**90**	**439**	**406**	**2,115**	**11,502**

Table A4.2: Sub-Regional Distribution by Regional Designation

	Con Rec	Rural	Agricultural	General Urban	Mixed Emp	Industrial	Total
Burnaby / New West	3			253	480	607	1,342
Delta/TFN	54		7	35	59	1,499	1,655
Langleys		1		51	215	729	996
North Shore				104	40	276	420
Northeast Sector	2		30	76	232	869	1,209
Richmond	60		12	147	425	1,097	1,741
Ridge / Meadows		201	0	76		683	960
Surrey / White Rock			1	127	981	1,425	2,534
Vancouver				11	136	497	644
Total	**119**	**202**	**50**	**880**	**2,569**	**7,681**	**11,502**

Table A4.3: Sub-Regional Distribution by Land Ownership Type

Sub Area	Private	Railway	Crown Corp	Public - Federal	Public - Provincial	Public - Muni/Reg	First Nations	Total
Burnaby / New West	1,141	36	44	43	14	65		1,342
Delta/TFN	1,032	10	42	315	19	237		1,655
Langleys	953		8		2	33		996
North Shore	203	3	10	183	1	20		420
Northeast Sector	931	157	7	51	9	24	30	1,209
Richmond	980		32	648	4	77		1,741
Ridge / Meadows	692	73	4		33	149	9	960
Surrey / White Rock	1,781	184	119	223	71	156		2,534
Vancouver	408	34	4	122	6	71		644
Total	**8,121**	**498**	**269**	**1,584**	**159**	**832**	**40**	**11,502**

Appendix 5: Inventory Tables – Municipal Geographies

Table A5.1: Consolidated Land Use Classification by Municipality

Sub-Region / Municipality	Building - Industrial	Land - Industrial	Large-Scale Infras / Transp	Transport Opts / Parking	Retail	Commercial	Other / Vacant	Total
Burnaby/New West	597	78	380	23	89	133	42	1,342
Burnaby	538	54	316	22	58	118	39	1,144
New West	59	24	65	1	31	15	3	198
Delta/TFN	783	120	397	5	29	8	313	1,655
Delta	753	119	391	5	23	8	228	1,527
TFN	31	1	6		6		84	128
Langleys	605	85	44		46	40	176	996
Langley City	72	5			3	1	3	85
Langley Twp	533	80	44		44	39	172	912
North Shore	110	16	244	5	10	14	21	420
North Van City	30	2	93	1	3	7		136
North Van Dist	80	15	151	3	6	8	21	284
Northeast Sector	445	82	565	9	39	12	56	1,209
Coquitlam	213	49	16	2	33	5	8	326
Port Coquitlam	225	19	143	7	6	3	36	439
Port Moody	7	14	406	1	1	4	11	444
Richmond	707	136	490	17	53	68	271	1,741
Richmond	707	136	490	17	53	68	271	1,741
Ridge/Meadows	124	138	101		3	1	593	960
Maple Ridge	74	125	4		3	1	527	735
Pitt Meadows	49	13	97				66	226
Surrey/White Rock	1,029	264	462	5	84	74	616	2,534
Surrey	1,029	264	462	5	84	74	616	2,534
Vancouver	239	55	155	26	85	57	27	644
Vancouver	239	55	155	26	85	57	27	644
Total	**4,639**	**975**	**2,839**	**90**	**439**	**406**	**2,115**	**11,502**

Table A5.2: Detailed Land Use Classification by Municipality

	Burnaby/New West			Delta/TFN			Langleys			North Shore			Northeast Sector				Ridge - Meadows					
	Burnaby	New West	Total	Delta	TFN	Total	Langley City	Langley Twp	Total	North Van City	North Van Dist	Total	Coquitlam	Port Coquitlam	Port Moody	Total	Richmond	Maple Ridge	Pitt Meadows	Total	Surrey	Vancouver	Total
Building-Intensive - Industrial	538	59	597	753	31	783	72	533	605	30	80	110	213	225	7	445	707	74	49	124	1,029	239	4,639
General Industrial	192	31	223	202	9	211	41	185	226	13	30	43	110	68	4	181	309	22	38	60	559	100	1,914
Mixed Industrial / Commercial	108	4	112	73		73	5	35	40	14	19	33	33	46	2	81	151	13	2	14	88	52	643
Manufacturing / Production	122	8	130	212		212	17	119	136	3	29	33	64	73	1	138	139	34		34	188	51	1,060
Distribution / Warehouse	116	16	131	266	22	288	10	194	203	0	1	1	6	39	0	45	109	5	10	15	194	36	1,022
Land-Intensive - Industrial	54	24	78	119	1	120	5	80	85	2	15	16	49	19	14	82	136	125	13	138	264	55	975
Processing / Handling of Natural Resources	10	4	14	36		36		46	46		12	12	13	5	12	30	50	99	10	109	73	17	387
Outdoor Storage	28	20	48	80	1	81	2	26	28		1	1	17	7	3	26	72	22		22	174	8	461
Maintenance Yards / Operations Services	16	0	16	3		3	3	8	11	2	2	4	19	7	0	26	14	3	3	6	17	30	127
Large-Scale Infrastructure / Transportation	316	65	380	391	6	397		44	44	93	151	244	16	143	406	565	490	4	97	101	462	155	2,839
Infrastructure - Utilities	47	1	48	93	2	95		18	18	1	18	20	3	1		4	19	4	1	4	119	5	332
Infrastructure - Oil Tank Farm	260		260								3	3			369	369							631
Transp Infras - Rail Yards	5	29	34	2	4	6				3	53	56	8	143		150	7		61	61	181	36	530
Transp Infras - YVR Airside / Groundside Developed																	200						200
Transp Infras - Airports Developed (excluding YVR)				14		14		26	26										36	36			76
Transp Infras - Port Terminal Developed	4	35	39	282		282				88	77	166	5		37	43	264				162	115	1,070
Transp Infra - Operations / Parking	22	1	23	5		5				1	3	5	2	7	1	9	17				5	26	90
Transportation - Operations	21	0	21	5		5				1	3	4	2	7		9	17				4	18	78
Transportation - Parking	0	1	2							0	0	1	0		1	1					1	8	12
Retail	58	31	89	23	6	29	3	44	46	3	6	10	33	6	1	39	53	3	3	84	85	85	439
Non-Industrial - Retail (big box)	13	5	19							3		3	12			12	18				14	15	80
Non-Industrial - Retail (small or medium-scale)	18	18	36	6	6	12	2	33	35	0	4	4	17	2	1	19	26	2		2	45	37	217
Non-Industrial - Retail (vehicle dealerships)	27	7	34	17		17	1	11	12	0	2	2	4	4	0	8	9	1		1	25	33	141
Commercial	118	15	133	8		8	1	39	40	7	8	14	5	3	4	12	68	1		1	74	57	406
Non-Industrial - Office	75	15	90	3		3	0	17	17	0	4	4	3	1	4	8	53				45	36	258
Non-Industrial - Media Production	40		40	1		1		8	8	6	1	7	1		0	1	5				6	15	82
Non-Industrial - Banquet Hall / Assembly	1		1				0	6	6		0	0		2	0	2	2				6	3	20
Non-Industrial - Education / Training		0	0	3		3		2	2		0	0					1				10	3	19
Non-Industrial - Recreation	2		2	0		0	1	6	7	1	2	2	1	0		1	6	1		1	7	1	27
Other / Vacant	39	3	42	228	84	313	3	172	176		21	21	8	36	11	56	271	527	66	593	616	27	2,115
Agriculture	0		0					4	4												135		139
Residential	5	0	5	1		1	3	71	74		1	1	0	2	0	2	4	27		27	102	6	223
Resource Extraction				66		66					1	1	5			5	41	102	4	106	13		232
Transp Infras - YVR Airside / Groundside Vacant																	62						62
Transp Infras - Airports Vacant (excluding YVR)				21		21		10	10														31
Transp Infras - Port Terminal Vacant	3	1	4	12		12	1	87	88		1	1					97					1	3	118
Vacant Land	31	2	33	127	84	212					18	18	3	34	11	48	66	398	62	460	365	18	1,309
Total	1,144	198	1,342	1,527	128	1,655	85	912	996	136	284	420	326	439	444	1,209	1,741	735	226	960	2,534	644	11,502

Table A5.3: Regional Designation by Municipality

	Con Rec	Rural	Agricultural	General Urban	Mixed Emp	Industrial	Total
Burnaby	1			203	474	465	1,144
Coquitlam				45	227	53	326
Delta	54		7	35	59	1,371	1,527
Langley City				16	22	47	85
Langley Township		1		35	193	682	912
Maple Ridge		201	0	8		525	735
New Westminster	2			49	6	141	198
North Vancouver City				5	40	90	136
North Vancr Dist				99		185	284
Pitt Meadows				68		158	226
Port Coquitlam	1		30	10	5	393	439
Port Moody	1			21		422	444
Richmond	60		12	147	425	1,097	1,741
Surrey			1	127	981	1,425	2,534
TFN						128	128
Vancouver				11	136	497	644
Total	**119**	**202**	**50**	**880**	**2,569**	**7,681**	**11,502**

Table A5.4: Land Ownership Type by Municipality

Municipality	Private	Railway	Crown Corp	Public - Federal	Public - Provincial	Public - Muni/Reg	First Nations	Total
Burnaby	1,022	7	37	7	12	59		1,144
Coquitlam	291	8	5	6	5	11		326
Delta	1,032	10	42	315	19	109		1,527
Langley City	81		1			2		85
Langley Twp	872		6		2	31		912
Maple Ridge	587		4		33	111		735
New West	119	29	7	36	2	6		198
North Van City	40	3	2	88		2		136
North Van Dist	163		9	94	1	17		284
Pitt Meadows	104	73				39	9	226
Port Coquitlam	236	150	2	7	2	12	30	439
Port Moody	405			37	2	0		444
Richmond	980		32	648	4	77		1,741
Surrey	1,781	184	119	223	71	156		2,534
TFN						128		128
Vancouver	408	34	4	122	6	71		644
Total	**8,121**	**498**	**269**	**1,584**	**159**	**832**	**40**	**11,502**

Appendix 6: Inventory Tables – Municipal Designation and Zoning

Table A6.1: Municipal Designation / Zoning by Regional Designation

RGS Designation	Yes OCP, Yes Zoning	Yes OCP, No Zoning	No OCP, Yes Zoning	Total
Con Rec	58	58	4	119
Rural	43	159	0	202
Agricultural	18	30	2	50
General Urban	391	105	385	880
Mixed Emp	1,989	577	3	2,569
Industrial	6,971	619	92	7,681
Total	**9,470**	**1,548**	**484**	**11,502**

Table A6.2: Municipal Designation / Zoning by Sub-Region

Sub-Regions	Yes OCP, Yes Zoning	Yes OCP, No Zoning	No OCP, Yes Zoning	Total
Burnaby / New West	1,116	10	216	1,342
Delta/TFN	1,553	99	3	1,655
Langleys	730	219	48	996
North Shore	399	7	14	420
Northeast Sector	1,117	60	32	1,209
Richmond	1,533	58	150	1,741
Ridge / Meadows	422	530	8	960
Surrey / White Rock	1,956	565	13	2,534
Vancouver	644	0		644
Total	**9,470**	**1,548**	**484**	**11,502**

Table A6.3: Municipal Designation / Zoning by Consolidated Land Use Classification

Land Use Category	Yes OCP, Yes Zoning	Yes OCP, No Zoning	No OCP, Yes Zoning	Total
Building - Industrial	4,379	72	188	4,639
Land - Industrial	838	96	40	975
Large-Scale Infras / Transp	2,598	77	164	2,839
Transport Opts / Parking	87	0	3	90
Retail	338	43	57	439
Commercial	330	54	22	406
Other / Vacant	899	1,205	10	2,115
Total	**9,470**	**1,548**	**484**	**11,502**

Appendix 7: Inventory Tables – Inventory Site Size Distribution

Table A7.1: Site Size Distribution by Consolidated Land Use Classification

Site Size	Building - Industrial	Land - Industrial	Large-Scale Infras / Transp	Transp Opts / Parking	Retail	Commercial	Other / Vacant	Total
less than 1 HA	1,348	159	72	12	157	132	210	2,090
1 to 1.99 HA	1,081	148	93	8	105	138	225	1,798
2 to 4.99 HA	1,306	284	228	14	111	94	330	2,367
5 to 9.99 HA	581	207	246	33	50	28	380	1,525
10 to 19.99 HA	228	175	279	23	16	14	469	1,204
20 HA and over	95		1,921				501	2,517
Total	**4,639**	**975**	**2,839**	**90**	**439**	**406**	**2,115**	**11,502**

Table A7.2: Site Size Distribution by Regional Designation

Site Size	Con Rec	Rural	Agricultural	General Urban	Mixed Emp	Industrial	Total
less than 1 HA	3	20	5	252	636	1,174	2,090
1 to 1.99 HA	2	9		134	671	983	1,798
2 to 4.99 HA	2	32	5	210	661	1,458	2,367
5 to 9.99 HA		37	10	84	307	1,088	1,525
10 to 19.99 HA		70		66	200	868	1,204
20 HA and over	112	34	30	135	94	2,111	2,517
Total	**119**	**202**	**50**	**880**	**2,569**	**7,681**	**11,502**

Table A7.3: Site Size Distribution by Land Ownership Type

Site Size	Private	Railway	Crown Corp	Public - Federal	Public - Provincial	Public - Muni/Reg.	First Nations	Total
less than 1 HA	1,933	4	16	51	16	69		2,090
1 to 1.99 HA	1,575	11	23	85	22	83		1,798
2 to 4.99 HA	1,935	42	43	207	32	109		2,367
5 to 9.99 HA	996	46	41	194	29	211	9	1,525
10 to 19.99 HA	597	13	50	270	59	214		1,204
20 HA and over	1,085	382	97	777		147	30	2,517
Total	**8,121**	**498**	**269**	**1,584**	**159**	**832**	**40**	**11,502**

Table A7.4: Site Size Distribution by Sub-Region

Site Size	Burnaby / New West	Delta / TFN	Langleys	North Shore	Northeast Sector	Richmond	Ridge - Meadows	Surrey / White Rock	Vancouver	Total
less than 1 HA	291	192	251	73	154	301	81	510	235	2,090
1 to 1.99 HA	248	220	239	37	136	269	48	513	89	1,798
2 to 4.99 HA	329	364	307	45	150	403	109	551	109	2,367
5 to 9.99 HA	178	261	121	38	99	259	155	330	83	1,525
10 to 19.99 HA	81	162	78	42	70	290	222	221	37	1,204
20 HA and over	214	455		185	601	218	345	408	91	2,517
Total	**1,342**	**1,655**	**996**	**420**	**1,209**	**1,741**	**960**	**2,534**	**644**	**11,502**

Appendix 8: Inventory Tables – Vacant Site Size Distribution

Table A8.1: Site Size Distribution of Vacant Lands by Regional Designation

Site Size	Rural	Agricultural	General Urban	Mixed Emp	Industrial	Total
less than 1 HA	6	1	48	81	74	210
1 to 1.99 HA	6		17	128	74	225
2 to 4.99 HA	30		35	120	145	330
5 to 9.99 HA	37		9	109	225	380
10 to 19.99 HA	70		16	95	288	469
20 HA and over	34	30		64	373	501
Total	**183**	**31**	**125**	**597**	**1,179**	**2,115**

Table A8.2: Site Size Distribution of Vacant Lands by Land Ownership Type

Site Size	Private	Railway	Crown Corp	Public - Federal	Public - Provincial	Public - Munic/Reg	First Nations	Total
less than 1 HA	171			7	7	24		**210**
1 to 1.99 HA	165		5	14	13	30		**225**
2 to 4.99 HA	232	8	3	45	17	26		**330**
5 to 9.99 HA	188	8	14	31	29	100	9	**380**
10 to 19.99 HA	197			95	49	128		**469**
20 HA and over	360			44		67	30	**501**
Total	**1,312**	**16**	**22**	**237**	**115**	**374**	**40**	**2,115**

Table A8.3: Site Size Distribution of Vacant Lands by Count

Site Size	Total Land HA	Total Count	Count as %
less than 1 hectare	210	741	68%
1 hectare to 1.99 hectares	225	152	14%
2 hectares to 4.99 hectares	330	107	10%
5 hectares to 9.99 hectares	380	51	5%
10 hectares to 19.99 hectares	469	32	3%
20 hectares and over	501	12	1%
Total	**2,115**	**1,095**	**100%**

Appendix 9: Land Use Classification Definitions

The following land use classification definitions are for the primary or predominant use of the site, including normally associated on-site accessory / ancillary uses (including parking and loading areas), as of mid-2020. Sites may include multiple or overlapping and non-discrete uses, in which case the predominant use is considered for the classification. A 'site' may represent multiple separate legal properties consolidated for the purposes of the inventory analysis. Current land use classifications are independent of future-oriented land use designations / policies.

Building-Intensive Industrial

1. **General Industrial:** Wide variety of heavy and light industrial uses of various scales including repair activities (excluding those defined in the other land use classifications), and limited industrial-related accessory uses, such as on-site retail and office.
2. **Mixed Industrial / Commercial:** A property with multiple units such as flex space, with numerous and varied industrial, quasi-industrial, and commercial uses (independent of tenure).
3. **Manufacturing / Production:** The conversion / transformation of raw materials or parts into finished goods.
4. **Distribution / Warehouse:** Specialized buildings that stock and handle products / goods to be redistributed, forming part of the supply network.

Land-Intensive Industrial

5. **Processing / Handling of Natural Resources:** Activities such as lumber, saw mills, shingle mills, aggregates, and asphalt / concrete (excludes 'Outdoor Storage' and 'Manufacturing / Production').
6. **Outdoor Storage:** Ongoing and temporary land-intensive outdoor storage of miscellaneous / scrap materials, solid waste / recyclable goods, auto-wreckers / vehicle parts, truck / chassis parking, shipping containers, construction materials, and heavy equipment / machinery (excludes: 'Resource Extraction', 'Processing / Handling of Natural Resources', and Port Terminal related storage / stockpiling).
7. **Maintenance Yards / Operations Services:** Municipal, corporate, and agency works yards involving the storage and maintenance of road, construction, and maintenance equipment and supplies, and ambulance / fire truck stations.

Large-Scale Infrastructure / Transportation

8. **Infrastructure - Utilities:** Electricity, natural gas, telephone, cable, communication towers, power sub-stations, liquid and solid waste management facilities, and other related / supporting functions.
9. **Infrastructure - Oil Tank Farm:** Facilities for petroleum products transportation, storage, or processing, including refineries, as well as associated hazard separation setback areas.
10. **Transportation Infrastructure - Rail Yards:** Rail intermodal terminals and yards (excluding individual rail lines / corridors; rail spurs located on properties are classified as per the primary use of that property).
11. **Transportation Infrastructure - YVR Airside / Groundside Developed*:** Airside lands refer to restricted industrial lands that are developed and reserved exclusively for airport-related activities (e.g. airplane maintenance and storage) requiring immediate access to runways and

taxiways and are not available for general market industrial use. Groundside lands refer to restricted industrial lands that are developed and not available for general market industrial, but permit uses that are 'airport compatible' (e.g. couriers) and are further limited by restrictions on building height and design because of adjacent flight paths. Lands available for general market industrial use are not included in this classification. Runways and airfields are not included in this classification, nor included in the Inventory.

12. **Transportation Infrastructure - Airports Airside / Groundside Developed* (excluding YVR):** Lands that are developed and reserved exclusively for airport-related activities (e.g. airplane maintenance and storage) requiring immediate access to runways and taxiways and are not available for general market industrial, but permit uses that are 'airport compatible'. Runways and airfields are not included in this classification, nor included in the Inventory.
13. **Transportation Infrastructure - Port Terminal Developed*:** Developed lands directly associated with port terminals / dock / wharf and equipment used for loading and unloading (and associated storage / stockpiling) of various types of goods (e.g. autos, bulk, breakbulk, and containers).

Transportation Operations / Parking

14. **Transportation - Operations:** Parking / storage / maintenance of transit operations (including TransLink depots) and large taxi operations located on Inventory lands.
15. **Transportation - Parking:** Properties that are used exclusively for parking of vehicles without another primary use, in the form of either surface parking lots or structured parking facilities, where ownership is not associated with adjacent properties / businesses (excludes lands used for the temporary storage of newly imported vehicles which is classified as 'Transportation Infrastructure - Port Terminal Developed').

Retail Uses

16. **Non-Industrial - Retail (big box):** Major stand-alone retail or wholesale units (chain stores or stores over 50,000 sq ft building sizes) and other commercial activities, and associated parking.
17. **Non-Industrial - Retail (small or medium-scale):** Individual or multiple retail uses (under 50,000 sq ft building sizes) and associated parking.
18. **Non-Industrial - Retail (vehicle dealerships):** New and used vehicle sales lots and business operations for showing, storing, and selling of vehicles (e.g. auto, trailer, boats) (excludes the temporary storage of newly imported vehicles which is classified as 'Transportation Infrastructure – Port Terminal Developed', and vehicle maintenance facilities which are classified as 'General Industrial')

Commercial Uses

19. **Non-Industrial - Office:** Stand-alone office building and associated parking, which may include retail uses on the ground level.
20. **Non-Industrial - Media Production:** Facilities used for production or broadcast of film / movies / videos, such as filming / recording studios, sound-stages, equipment storage / rental, however excludes software production offices.
21. **Non-Industrial - Banquet Hall / Assembly:** Assembly facilities and associated parking, used for religious or non-religious large-scale assembly / gathering activities and events.

22. **Non-Industrial - Education / Training:** Training, vocational school or other educational related facilities, which may or may not include a classroom component.
23. **Non-Industrial - Recreation:** Indoor or outdoor recreational uses, such as fitness facilities, racket clubs, and other recreational activities.

Other Uses / Vacant

24. **Agriculture:** Agricultural or farming relates uses (independent of Agricultural Land Reserve designation or BCAA Farm Class status), as a possible holding use for future conversion.
25. **Residential:** Residential use, typically an older single detached house and yard, as a possible holding use for future conversion to industrial, and in some cases other forms of residential that may limit the potential to redevelop the lands to industrial uses.
26. **Resource Extraction:** Earth extraction uses, such as aggregates / gravel / sand pits, and peat.
27. **Transportation Infrastructure - YVR Airside / Groundside Vacant*:** Airside lands refer to restricted industrial lands intended for development and are reserved exclusively for airport-related activities (e.g. airplane maintenance and storage) requiring immediate access to runways and taxiways and are not available for general market industrial use. Groundside lands refer to restricted industrial lands intended for development and are not available for general market industrial, but permit uses that are 'airport compatible' (e.g. couriers) and are further limited by restrictions on building height and design because of adjacent flight paths. Lands available for general market industrial use are not included in this classification. Runways and airfields are not included in this classification, nor included in the Inventory.
28. **Transportation Infrastructure – Airport Airside / Groundside Vacant (excluding YVR)*:** Industrial lands intended for airside development and are reserved exclusively for airport-related activities (e.g. airplane maintenance and storage) requiring immediate access to runways and taxiways and / or groundside lands that are intended for 'airport compatible' activities (e.g. couriers) and are limited by restrictions on building height and design because of flight path. Lands available for general market industrial use are not included in this classification. Runways and airfields are not included in this classification, nor included in the Inventory.
29. **Transportation Infrastructure - Port Terminal Vacant*:** Vacant lands directly associated with port terminals / dock / wharf and equipment intended for use for loading and unloading (and associated storage / stockpiling) of various types of goods (e.g. autos, bulk, breakbulk, and containers).
30. **Vacant Land:** Lands that do not have any identified improvements or uses of any sort or type (either industrial or non-industrial).

**** Note: These lands may have restrictions on tenure, use, and development and not available for general market industrial, but permit uses that are port or airport compatible. For more detailed information, refer to the YVR Master Plan or Port of Vancouver Land Use Plan, as applicable.***

Appendix 10: Inventory Methodology

Project Process Steps

The Metro Vancouver 2020 Regional Industrial Lands Inventory was prepared using the following process steps, similar to that used for the 2015 Inventory.

While preparing the 2020 Inventory, staff in several municipalities reviewed and reinterpreted their original 2015 Inventory policies, which resulted in a revised 2015 Inventory. This revised 2015 Inventory is used to measure industrial land changes over the 2015 - 2020 period. It is important to emphasize that 2020 Inventory results should not be compared at face value with published results from previous 2005, 2010, and 2015 Inventories due to methodological differences, improvements in data, and various inconsistencies, including:

1. **Inventory Boundary Delineations** – Each Inventory snapshot (2005, 2010, 2015, 2020) uses a slightly different shoreline boundary that cumulatively impacts land area calculations for waterfront sites.
2. **Inventory Universe** – Industrial-serving additional lands (e.g. intermodal yards and sewerage treatment plants) were included in the 2010, 2015, and 2020 Inventories, but not the 2005 Inventory.
3. **Municipal Staff Policy Interpretation** – At times, different municipal policy requires interpretation and judgment. Despite no policy change, policy interpretation has shown to vary among the Inventories.

The 2020 Inventory attempts to account for the above methodological differences and inconsistencies (plus other minor adjustments) by neutralizing their cumulative impact through a 'back-casting' of the earlier 2015 published Inventory results into '2015 revised' figures, thereby enabling direct comparisons and measures of 'net' change between 2020 results with modified results from the revised 2015 Inventory. The revised 2015 Inventory numbers referred to in this report reflect adjustments to the noted inconsistencies, and are thus more comparable with the 2020 Inventory results.

All lands that were municipally designated as Industrial (in municipal Official Community Plans and/or Neighbourhood Plans, or equivalent) were included in the Inventory. In addition, properties that were not designated Industrial, but were zoned (or equivalent) Industrial (or zoned as comprehensive development with allowable industrial uses) and developed / used as industrial were included (see definitions). As well, the Inventory incorporates the Port of Vancouver and YVR Vancouver Airport Authority land use plans.

Past Metro Vancouver Regional Industrial Lands Inventories

The 2005 and 2010 Inventories used the following definitions:

- *Industrial Land:* Lands designated by municipal Official Community Plans for industrial uses, or land zoned and utilized for industrial uses.

- *Developed Industrial Land: Industrial Land* that is wholly or partially utilized for industrial related uses, which includes properties used for outdoor storage. This also includes office, retail, or institutional uses that are allowed within municipal industrial zones.
- *Vacant Industrial Land: Industrial Land* that is not utilized for industrial related uses, which includes industrial properties that are completely vacant as well as industrial properties currently utilized for residential and agriculture uses.

For both the past 2005 and 2010 Inventories, Metro Vancouver considered only whether the land was 'Developed' or 'Vacant'. In actuality, industrial lands have different types of uses, levels of utilization, and development potential due to various site and area factors or characteristics.

The previous binary Inventory classification did not reflect the on-the-ground reality that some 'Developed' properties are only partially utilized (and have significant redevelopment and intensification potential), nor the fact that some 'Vacant' properties may have significant development constraints (or are being used for other non-industrial purposes).

The past Inventories did not include the level of data to provide a detailed picture of industrial land uses and utilization level, as well as market readiness and intensification potential. Specifically, although these Inventories allowed for a tally of the industrial lands in the region (i.e., 'Developed' and 'Vacant'), they did not assess the level of utilization, consider land ownership and designations, include site physical constraints, or have the ability to analyze the future capacity of the lands. Past analysis was limited to high level reporting.

Enhanced Metro Vancouver Regional Industrial Lands Inventories

The enhanced data collection and classification system addresses limitations and criticisms inherent in previous industrial lands Inventory projects. Building on past work, the more recent 2020 and 2015 Regional Industrial Lands Inventory provides enhanced detail about the industrial land supply. The 2020 and 2015 Inventory data is classified by development status, type of use, land ownership, municipal and regional designations, and other attributes, with an aim to informing municipal and regional plans and policies, and public and private sector investments. The Inventory allows for greater refinement and understanding of the industrial land use and capacity, while still allowing for comparisons of change over time.

The improvements to the 2020 and 2015 (revised) Inventory also reflected the following factors:

- Improved GIS mapping / boundaries information
- Improved consistency in terms of applying criteria for land classifications
- Improved consistency in terms of recognizing site constraints
- Removing un-developable lands due to transportation and infrastructure rights-of-way

These refinements improve the Inventory and also make it possible to directly and accurately compare the 2020 and revised 2015 Inventory to assess changes in the region's industrial land base and changes in lands absorbed over the five-year period.

Appendix 11: Inventory Data Base

Property information collected through the 2020 Inventory, which can be used for further analysis:

Land Ownership / Tenure

- Private – fee simple, strata
- Railways
- Crown Corporations
- Public (municipal / regional – Metro Vancouver and TransLink)
- Public (Provincial)
- Public (Federal, Port, Airport)
- First Nations

Site Physical

- Site size
- Year building built / major renovation
- Assessed value of land / improvements
- Rights of Way (ROWs)
- Floodplain

Site Regulatory

- Municipal industrial zoning
- Municipal industrial designation
- Regional land use designations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SERVICES AND SOLUTIONS FOR A LIVABLE REGION

To: Regional Planning Committee

From: Heather, McNell, General Manager, Regional Planning and Housing Services

Date: March 31, 2021 Meeting Date: April 9, 2021

Subject: **Manager's Report**

RECOMMENDATION

That the Regional Planning Committee receive for information the report dated March 31, 2021, titled "Manager's Report".

REGIONAL PLANNING COMMITTEE 2020 WORK PLAN

The Regional Planning Committee's Work Plan for 2021 is attached to this report (Attachment 1). The status of work program elements is indicated as pending, in progress, ongoing or complete. The listing is updated as needed to include new issues that arise, items requested by the Committee, and changes to the schedule.

***METRO 2040* HOUSING DEMAND ESTIMATES**

Table A.2 in *Metro 2040* provides Housing Demand Estimates by Tenure and Household Income for Metro Vancouver's sub-regions and member jurisdictions. The existing Housing Demand Estimates cover growth in total households over 10 years (2016-2026) based on regional population and household projections. As part of the *Metro 2050* regional growth strategy update, Metro Vancouver staff have been considering an update to the Housing Demand Estimates.

In April 2019, the introduction of the Province's new requirement for the completion of Housing Needs Reports requires that local governments collect data, analyze trends, and prepare reports every five years that describe current and projected housing needs in their respective communities. Metro Vancouver staff have been working closely with member jurisdictions over the past two years to compile and share the data required to support the completion of these reports. With this new provincial reporting requirement in place, it has been determined that there is little interest or need for updating and including the Housing Demand Estimates in the regional growth strategy. Metro Vancouver staff propose that updated Housing Demand Estimates not be included in *Metro 2050*, but rather that the Housing Demand Estimates, in conjunction with the population, housing and employment projections, take the form of regularly published updates to better meet the needs of the Metro Vancouver utilities, member jurisdictions and housing providers across the region for current data. As a result, the intent will be to regularly and publish annual data reports for member jurisdictions and publicly post them on the Metro Vancouver website, as a replacement to the static data table in *Metro 2040*.

***METRO 2040* TARGETS FOR GROWTH TO URBAN CENTRES AND ALONG TRANSIT CORRIDORS**

Table 2 in Strategy 1.2 of *Metro 2040* provides Metro Vancouver Dwelling Unit and Employment Growth Targets for Urban Centres and Frequent Transit Development Areas, defined for the period 2006-2041. Table 2 provides guidance to assist regional and local planning efforts, as well as transit

investment planning by TransLink. As part of the *Metro 2050* regional growth strategy update, one of the MVRD Board endorsed policy directions of the Urban Centres and Frequent Transit Development Areas Policy Review was to update the Growth Targets to align with the *Metro 2050* growth projections.

Upon further review, Metro Vancouver staff have determined that updating the Growth Targets requires additional analysis and extensive engagement with member jurisdictions. Since COVID-19 has affected the timelines and engagement of *Metro 2050*, the intent is to keep the existing targets in Table 2 and update them after *Metro 2050* has been adopted in a collaborative process with member jurisdictions. This can be implemented in a subsequent proposed amendment to the regional growth strategy to be considered by the MVRD Board. Staff will prepare a separate scope of work including objectives, engagement and project goals for the Growth Target update in consultation with the Regional Planning Advisory Committee for consideration by the Regional Planning Committee after the adoption of *Metro 2050.*

As reminder, the targets include 40% of dwelling unit growth and 50% of employment growth to 2040 to Urban Centres and an additional 27% of dwelling unit growth and 28% of employment growth to 2040 to Transit Corridors via Frequent Transit Development Areas. The Urban Centres and Frequent Transit Development Area Policy Review included a recommendation to update these targets in alignment with the updated growth projections. The policy review recommended that the targets be refined to more specific geographies such as sub-regions or by municipality, rather than just be region-wide by Centre type.

METRO 2050 **POLICY – EMPLOYMENT LANDS AND MIXED USE ADJACENT TO RAPID TRANSIT STATIONS**

At the March 5, 2020 Regional Planning Committee Meeting, there was discussion related to the proposed *Metro 2050* Goal 2 policy to permit limited residential uses on the upper floors of mixed-use buildings, containing industrial/employment uses on the ground floors, on lands with an Employment regional land use designation, that are within 200m of a rapid transit station and located within an Urban Centre or Frequent Transit Development Area.

Policy Objective

The objective of the proposed policy is to protect Employment lands from the pressures of other regional land uses given the decreasing available supply of such land. In addition, this policy provides a balance in creating more flexibility for Employment lands while ensuring greater protection for lands designated Industrial in the regional growth strategy. Along with the above noted objective, the policy framework also seeks to increase affordable rental housing near transit. This supports previous work undertaken by Metro Vancouver staff, such as the Transit Oriented Affordable Housing Study (TOAH) and the current regional growth strategy, along with Metro Vancouver Board direction.

Rationale for The Proposed Policy

Presently, given the significant pressures on Employment and Industrial lands in the region to convert to other land uses, and the limited supply of those lands, *Metro 2040* has ensured strong protections through an appropriate policy framework. These lands are also important in supporting the local, regional and national economies. In addition, the Regional Industrial Lands Strategy (RILS), Metro

Vancouver's most recent work in this area, has re-enforced the need for greater protections to support this form of land use and job creation across the region. RILS was a collaboration of industry experts, planners, member jurisdictions and Metro Vancouver. The recently completed 2020 Regional Industrial Lands Inventory further documents this limited supply of Industrial and Employment lands in the region; a report on the 2020 Inventory is on this meeting's agenda of the Regional Planning Committee. The *Metro 2040* Industrial and Mixed Employment Policy Review, which was prepared to inform *Metro 2050*, concluded a balanced approach should be considered where Employment lands coincide with rapid transit stations; particularly given the key objective of the regional growth strategy to support transit-oriented affordable housing. The analysis continues to identify that the pressures to convert lands to other uses and the already significant supply shortage requires enhanced protections for Industrial and Employment lands. As such, the proposed policy framework seeks to provide those enhance protections in exchange for the provision of housing near transit to satisfy other objectives in *Metro 2040* around affordable housing.

Rationale for 200m Radius

Allowing limited residential development within 200m of a rapid transit station provides flexibility for those lands proximate to the station, while still protecting the overall employment area from pressures for land use conversion. This approach would:

a) provide more opportunities for transit-oriented affordable housing in the region;
b) support the significant transit investment with greater ridership; and
b) provide better access to jobs.

While Employment lands near rapid transit stations are not pervasive throughout the region, the proposed approach recognizes the opportunity to balance residential pressures with the need to protect Employment lands. In total across the region, the amount of Employment lands that are proximate to rapid transit stations is approximately: 45.2 ha within a 200m radius, and 174.8 ha within a 400m radius (see Attachment #2 – for the affected lands). The vast majority of these lands are located in the cities of Burnaby and Vancouver.

As noted above, moving the radius to 400m would impact nearly 4 times the amount of land available for conversion to other uses than those identified in the Employment designation. The increased available capacity for land conversion will have a significant impact on the available Employment lands, which already experience substantial pressures across the region. Given this, staff determined the balanced approach to providing protection for employment lands as well as providing opportunity for affordable rental housing near rapid transit was best served using the 200m radius.

When this policy was proposed through the Regional Industrial Lands Strategy process and to the Intergovernmental Advisory Committee, there was significant diversity in how it was received, with many municipal planners voicing concern about the impact of *any* buffer or allowance of residential uses – expressing concern about destabilizing employment areas and displacing businesses because of the resulting land lift. Other interests, primarily the development community, were in favour of the policy and ability to optimize these locations.

Final Note

It is worth mentioning that a key tenet of the regional growth strategy is supporting transit-oriented development as a growth management tool. There are other mechanisms in the regional growth strategy to enable member jurisdictions to optimize these locations. First, this policy proposal is enabling only, and a member jurisdiction may choose to not allow residential in these locations via their respective zoning bylaw. And second, a member jurisdiction may choose to seek a redesignation for these locations from Employment to General Urban via a Type 3 amendment to the regional growth strategy, which would permit residential at densities consistent with their Official Community Plan designation and zoning bylaw.

Attachments

1. Regional Planning Committee 2021 Work Plan
2. Map – Lands with a Regional Employment Land Use Designation within 200m of Rapid Transit Stations *(44713201)*

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Regional Planning Committee 2021 Work Plan

Report Date: March 31, 2021

Priorities

1st Quarter	**Status**
Metro 2050 Implementation Policy Recommendations	Complete
Metro 2050 Climate Change Policy Review Recommendations	Complete
Hey Neighbour Discussion Paper	Complete
Social Equity in Regional Planning – Phase II	Complete
Metro 2050 draft policies – Goal 1	Complete
Metro 2050 draft policies – Goal 2	Complete
Metro 2050 draft policies – Implementation Section	Complete
Housing and Transportation Cost Burden Study – Scope	Pending
Regional Agricultural Land Use Inventory - Scope	Pending
2nd Quarter	
Projections for Population, Housing and Employment (Data Projections)	In Progress
Metro 2050 draft policies – Goal 3 (Includes Climate Research and SEI)	Complete
Metro 2050 draft policies – Goal 4	In Progress
Metro 2050 draft policies – Goal 5	In Progress
Regional Industrial Lands 2020 Inventory	Complete
Regional Industrial Land Implementation Tools - Scope	Pending
Ecosystem Services from Agricultural Land – Scope	Pending
Regional Land Use Assessment – Implementation Tools – Scope	Pending
3rd Quarter	
Draft Metro 2050 Refer for Comment	Pending
Where Matters Phase II - Update	Pending
Land Use Model Preparation – Land Use Component – Report Out	Pending
Data/Projections Validation – Report Out	Pending
Land Use Model - Scope	Pending
Regional Agricultural Land Use Inventory – Update	Pending
4th Quarter	
Ecosystem Services from Agricultural Land – Report Out	Pending
Housing and Transportation Cost Burden Study - Report Out	Pending
Regional Land Use Assessment –Update	Pending
Regional Agricultural Land Use Inventory – Report Out	Pending
Land Use Model – Report Out	Pending
Regional Industrial Land Implementation Tools – Update and Report Out	Pending
Metro 2050 – Update on Comment Period	Pending

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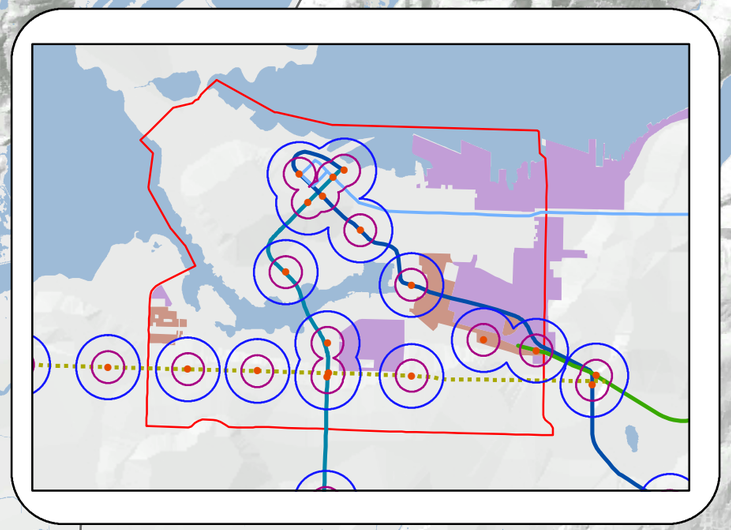
Employment Lands Impacted By Rapid Transit Stations (200 and 400 Radius)



Rapid Transit Stations
- Rapid Rail & Bus Stations
- Rapid Rail & Bus Stations 200m
- Rapid Rail & Bus Stations 400m

Rapid Transit Service
- Canada Line
- Expo Line
- Millennium Line
- Proposed Broadway Line
- Proposed Expo Line Ext
- Rapid Bus Lines

Metro2040 Designations
- Industrial
- Mixed Employment

Urban Centre

N

0 2 4
Kilometres