

City of Kingston Employment Land Strategy Review

In Association with:

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 Planning for growth

Contents

	Page
Executive Summary	(i)
1. Introduction	1-1
1.1 Terms of Reference	1-1
1.2 What are Industrial Lands?	1-2
1.3 Why are Industrial Lands Important?	1-2
2. Macro-Economic Trends Influencing Industrial Land Development	2-1
2.1 Macro-Economic Trends	2-1
2.1.1 Ontario Economic Outlook	2-1
2.1.2 Shift in the Provincial Economic Structure	2-2
2.2 Evolving Nature of Industrial Lands	2-3
2.3 Observations	2-4
3. Regional Competitiveness Analysis	3-1
3.1 Kingston's Key Attributes	3-1
3.2 Municipal Comparative Analysis	3-2
3.2.1 Supply of Vacant Industrial Lands	3-2
3.2.2 Cost of Development	3-4
3.3 Observations	3-9
4. Kingston's Economic Structure and Profile of Industrial Lands	4-1
4.1 Kingston's Economic Structure	4-1
4.1.1 Employment Growth Trends	4-1
4.1.2 Industry Clusters in Kingston	4-3
4.1.3 Business Growth by Sector, 2007-2012	4-4
4.2 Industrial Lands Profile	4-5
4.2.1 Industrial Lands Overview	4-5
4.2.2 Official Plan Designations	4-5
4.2.3 Urban Industrial Lands Employment Structure	4-7
4.2.4 Rural Industrial Lands	4-9
4.2.5 Overview of Kingston Industrial/Business Park Areas	4-10
4.2.6 Industrial Lands Employment Density and Building F.S.I.	4-17
4.2.7 Trends in Development Activity on Industrial Lands	4-18
4.2.8 City of Kingston Industrial Land Sales	4-25
4.2.9 Vacant Industrial Floor Space	4-27
4.3 Observations	4-28
5. City of Kingston Urban Industrial Land Supply	5-1
5.1 Vacant Urban Industrial Lands Analysis	5-1
5.2 Vacant Industrial Land Characteristics	5-6
5.2.1 Industrial Lands Designation	5-6
5.2.2 Serviced Shovel-Ready Lands	5-9
5.3 Market Choice Requirements	5-10
6. City of Kingston Forecast Employment Growth and Urban Industrial Land Needs	6-1
6.1 Long-Term Employment Forecast	6-1
6.2 Industrial Land Needs Forecast Approach	6-6

6.3	Employment on Industrial Lands	6-7
6.4	Industrial Land Demand	6-10
6.5	Industrial Land Needs	6-11
6.6	Industrial Land Needs by Land Type	6-12
6.7	The City's Industrial Land Needs	6-16
6.8	Urban Residential and Commercial Land Needs	6-18
6.9	Observations	6-19
7.	Policy Context	7-1
7.1	Provincial Policy Context	7-1
7.2	Municipal Policy Context	7-5
7.3	Other Relevant Planning/Economic Studies	7-10
7.3.1	Urban Growth Strategy	7-10
7.3.2	Kingston's Strategic Plan, 2011-2014	7-10
7.3.3	K.E.D.C.O. Strategic Plan "Kingston 2020"	7-11
7.3.4	Kingston Norman Rogers Airport 2007 Master Plan	7-11
7.3.5	Kingston Airport Expansion Studies	7-12
7.3.6	City of Kingston Transportation Master Plan	7-13
8.	Assessment of Kingston's Industrial Areas	8-1
8.1	General Characteristics of Industrial/Business Parks	8-1
8.2	Potential to Accommodate Development within Industrial Areas	8-3
8.2.1	Market Choice and Quality of Vacant Industrial Lands by Industrial Area	8-3
8.2.2	Intensification Potential of Underutilized Industrial Lands	8-4
8.3	Industrial Areas S.W.O.C. Analysis	8-11
8.4	Industry Sector Requirements	8-17
8.5	Assessment of Competitiveness and Investment Readiness of Industrial Areas	8-18
8.6	Conclusions	8-32
9.	Proposed Conversion of Designated Industrial Lands	9-1
9.1	Context for Industrial Lands Conversions	9-1
9.2	Candidates for Conversion	9-1
9.3	Evaluation	9-4
9.4	Sites Recommended for Conversion Based on Evaluation	9-22
9.5	Potential Conversions to Industrial Designation	9-25
9.6	Industrial Land Supply Adjusted for Conversions	9-26
9.7	Industrial Land Needs Analysis Based on Recommended Conversions	9-27
9.8	Review of City's Official Plan Evaluation of Conversions Framework	9-28
10.	The City's Future Role in Industrial Land Development	10-1
10.1	Municipal Trends in Industrial Land Development	10-1
10.2	Evaluation of Industrial Land Development Approaches in Kingston	10-3
10.3	Public-Private Partnerships	10-4
10.4	Conclusions	10-4
11.	Accommodating Forecast Growth on Industrial Lands	11-1
11.1	Accommodating Future Growth within New Industrial Areas	11-1
11.1.1	Currently Available Serviced Shovel-ready Supply	11-1

11.1.2	Expansion of Medium-term Land Supply (5-10 years)	11-3
11.1.3	Long-term Land Supply (10+ years)	11-5
11.2	Redevelopment of Industrial Lands	11-6
12.	Policy and Zoning Evaluation	12-1
12.1	Introduction	12-1
12.2	Kingston's Policy Competitiveness with Other Highway 401 Municipalities	12-1
12.2.1	Competitiveness of Official Plan Policies	12-2
12.2.2	Competitiveness of Zoning By-law Provisions	12-5
12.3	Trends and Specific Issues: Policy Analysis and Discussion	12-15
12.3.1	Best Practice: Improving the Environment for Employees	12-15
12.3.2	Balancing Office Space in Employment Lands versus the Central Business District	12-17
12.3.3	Strengthening Commercial and Complementary Land Use Policy for Employment Areas	12-19
12.3.4	Pro-Actively Clustering Rural Industrial Development	12-21
12.3.5	Clarification of the Eco-Friendly Policy	12-22
12.3.6	Clarification of Permitted but Conflicting Land Uses	12-23
12.3.7	Keeping Pace: The Brownfield Community Improvement Plan	12-24
12.3.8	Guiding the Transition: A Policy Framework for Conversion to Non-Industrial Uses	12-24
12.4	Summary of Recommendations	12-25
13.	Marketing Strategy Outline for the City's Industrial Lands	13-1
13.1	Key Elements of Marketing Strategy	13-1
13.2	Marketing Best Practices	13-2
14.	Recommendations	14-1
	Appendix A – Key Findings of Stakeholder Consultation	A-1
	Appendix B – Written Submissions Through Public Consultation	B-1
	Appendix C – Industrial Land Inventory	C-1
	Appendix D – Policy and Zoning Evaluation	D-1
	Appendix E – Zoning By-law Comparison of Permitted Land Uses	E-1
	Appendix F – Zoning By-law Comparison Matrix	F-1

List of Acronyms and Abbreviations

C.N.	Canadian National
E.A.	Environmental Assessment
E.L.R.	Employment Land Strategy Review
F.S.I.	Floor Space Index
G.D.P.	Gross Domestic Product
G.F.A.	Gross Floor Area
G.I.S.	Geographic Information System
G.T.A.	Greater Toronto Area
Ha	Hectare
I.C.I.	Industrial, Commercial, Institutional
K.E.D.C.O.	Kingston Economic Development Corporation
K.T.M.P.	Kingston Transportation Master Plan
L.Q.	Location Quotients
N.A.I.C.	North American Industrial Classification
O.P.	Official Plan
P.P.S.	Provincial Policy Statement
R. & D.	Research and Development
Sq.ft.	Square foot
S.W.O.C.	Strengths, Weaknesses, Opportunities, Challenges
U.S.	United States

Executive Summary

The City of Kingston retained Watson & Associates Economists Ltd. in association with Dillon Consulting Limited, hereafter referred to as the Consultant Team, to prepare an Employment Land Strategy Review (E.L.R.). The E.L.R. was developed under the provincial framework and represents a key component of the City's comprehensive review exercise with respect to the expansion of settlement area boundaries and/or the conversion of employment lands.

The purpose of developing an E.L.R. is to create a long-term vision and plan for future industrial (employment) lands within the City of Kingston, in keeping with the provincial policy direction provided under the Provincial Policy Statement 2014 (P.P.S.) and the City's Official Plan (O.P.). A primary objective of the E.L.R. is to ensure that Kingston continues to develop as a competitive, well-balanced and sustainable community. The E.L.R. also supports the City's economic development objectives to ensure that Kingston is competitive with respect to future business retention and attraction in the community.

The study also represents a critical background document to the City's Official Plan (O.P.) review process. Integral to this analysis for the City of Kingston is an assessment of how employment growth in Kingston will be planned, phased and accommodated in its industrial areas. This analysis is critical to guiding the timing and quantum of future land needs, hard and soft infrastructure requirements and municipal finance impacts associated with new development. The following provides an overview of key study findings:

Economic Trends and Influence on Industrial Lands

The macro economy has experienced significant volatility in the past decade, including a period of strong economic growth followed by an economic recession and subsequent modest recovery. Recent trends suggest a strengthening outlook for the national and provincial economies with regard to economic output or gross domestic product. However, the past decade has been a period of considerable change for the Ontario economy.

Structural changes in the economy are changing the character of economic activities on industrial lands and impacting the built form and character of industrial areas. Over the past decade, the composition of industrial development in Ontario has evolved, with less emphasis on the manufacturing sector. While the manufacturing sector has been

generally stagnant, there have been growth opportunities in other forms of industrial development oriented to large-scale industrial buildings accommodating wholesale trade, distribution and logistics. This has been driven by an increasing demand in the “goods movement” sector.

There has also been market demand to accommodate an increasing share of non-industrial development on industrial lands. This is driven largely by significant growth in “knowledge-based” or “creative class” sectors which are largely accommodated within office development and often located within prestige employment areas. Further, there is increasing interest to accommodate other complementary commercial and institutional uses on industrial lands to create a more mixed-used environment.

Recent structural changes in the economy have created many challenges and opportunities for municipalities as the role of industrial lands continues to evolve. As such, industrial land stewardship is of increasing importance to ensure long-term sustainability and competitiveness.

Kingston’s Competitive Position

Kingston benefits from its location along Highway 401, which serves as Canada’s major trade corridor and links major urban centres in Ontario and Quebec to the United States. Kingston’s industrial lands are centrally located to serve major North American employment markets.

Kingston offers an unparalleled concentration of post-secondary and government institutions to serve as a catalyst for the continued growth of the “knowledge-based” and “creative class” economy. Kingston also boasts a highly skilled labour force which is attractive for both international and locally based industries. Further, Kingston offers a high quality of life, consistently ranked as one of the best communities in Canada in which to live. Quality of life is becoming an increasingly important attribute, particularly within the knowledge-based sector, with workers increasingly determining their place of residency based on quality of life factors. In turn, businesses are attracted to communities which offer a growing and diverse labour force pool.

Industrial development costs in Kingston are generally competitive, albeit industrial land prices are higher in Kingston than in municipalities in the surrounding market area, which may put the City at a disadvantage in attracting land expansive users. However, the City exempts industrial development from development charges/impost fees and offers competitive industrial tax rates which are favourable from a cost of development perspective. Kingston also has a relatively large supply of designated and shovel-ready

industrial land available for development compared to other municipalities in the surrounding market area.

Kingston's Economic and Industrial Areas Profile

Kingston's economy is largely oriented towards educational services, public administration, accommodation and food services, health care and social assistance and construction. Kingston has a relatively low concentration of employment in a number of industrial sectors, including utilities, manufacturing, wholesale trade and transportation and warehousing.

Since 2006, Kingston has experienced moderate employment growth at a slightly higher rate than the provincial average. Similar to the provincial economy as a whole, the nature of the Kingston economy is changing. Over a number of years, the composition of Kingston's employment base has gradually shifted from the goods-producing sector to the service sector, including education, health care, public administration, business services, retail and accommodation and food. Of the industrial sectors, only the construction sector demonstrated strong employment growth. In comparison, manufacturing showed a slight increase in employment growth and transportation/warehousing and wholesale trade exhibited slight declines.

Kingston has a significant and diverse industrial lands base which is highly important to the local economy. Kingston's industrial lands accommodate a broad range of industrial uses, including manufacturing, distribution/logistics, construction and transportation, as well as commercial (including office) and institutional/recreational uses.

Kingston's urban industrial lands are organized into twelve delineated industrial/business park areas which comprise a developed industrial land base of 696 net Ha (1,720 net acres). This includes four large established industrial/business park areas within proximity of Highway 401, including Cataraqui Estates Business Park, Gardiners Road Industrial Area, Clyde Industrial Park and St. Lawrence Business Park. Kingston also has a number of older industrial areas, including the Old Industrial Area, Alcan Industrial Area, Progress Industrial Area and Nortel Industrial Area which have seen limited development activity over the past decade. Kingston also has two small business/research and development parks – Queen's Innovation Park and Alcan Business Park which are prestige employment areas.

Kingston also has approximately 247 Ha (610 acres) of developed rural industrial lands located outside the Urban Boundary. The rural industrial lands accommodate general industrial type businesses, including salvage yards, land fill sites and contractor yards.

Over the past decade, industrial land absorption levels have averaged approximately 12 net Ha (30 net acres) per year. Annual industrial lands absorption has fluctuated widely by year. Approximately 57% of industrial lands absorbed over the past decade have been prestige industrial lands (i.e. Business Park Industrial designated lands). The majority of growth over the past decade has been driven by transportation/warehousing and the commercial sector, with development concentrated in the professional, scientific and technical services and retail trade sectors. In contrast, Kingston has seen limited development in other industrial sectors. Over the past decade, the majority of new development has been accommodated in the Cataraqui Estates Business Park, St. Lawrence Business Park and Clyde Industrial Park.

The City of Kingston is a key industrial land developer in the city, assembling and servicing land. The City's land development activity accounts for a substantial portion of total industrial land absorption. The remainder is from concurrent development of privately owned lands. Over the 2006 and 2012 period, City of Kingston land sales have averaged 9 net Ha (22 net acres) per year, representing approximately 61% of total industrial lands absorbed in the City.

Kingston currently has an industrial vacancy rate of 8.1% which indicates that there is some underutilized building capacity in the industrial market. The industrial vacancy rate is expected to decline moderately over the medium term, as macro economic conditions improve and Kingston's industrial market strengthens. The anticipated uptake of vacant industrial space is not expected to have a significant impact on industrial land needs.

Kingston's Industrial Land Supply

A major factor in the future competitiveness of Kingston's economic base is the supply and quality of its vacant industrial lands. As of 2014, urban industrial land supply is estimated to total 257 net Ha (635 net acres), of which 44% is located within the Gardiners Road Industrial Area and neighbouring Cataraqui Estates Business Park. Kingston also has 75 Ha (185 acres) of vacant rural industrial land.

As a general rule of thumb, in order to allow for proper market functioning, it is recommended that a minimum five-year supply of serviced industrial lands (by various sizes, zoning and locations) is available at all times throughout the forecast period. Based on recent absorption trends, it appears that Kingston is currently meeting this requirement. However, despite the availability of vacant industrial land, market choice is somewhat limited with respect to larger sized parcels (i.e. 5 Ha and greater), prestige industrial lands (i.e. Business Park designated lands) and City-owned lands.

Urban Industrial Land Needs

Future demand for industrial lands within Kingston is ultimately driven by forecast employment growth. A broad range of factors are anticipated to drive future employment growth in Kingston over the long-term period. These factors will not only impact the rate and magnitude of growth but will also influence the form and density of non-residential development and corresponding demand for industrial lands.

This study examines urban industrial land needs over a 20-year time horizon (i.e. 2014-2034). Over this period, Kingston's industrial lands are anticipated to accommodate 45% of Kingston's total employment growth totalling approximately 4,600 jobs. Over the planning horizon, an estimated 10% of employment growth is expected to be accommodated through intensification. It is anticipated that the majority of this intensification will be accommodated through infill, redevelopment and expansion of existing developed properties.

It is foreseeable that future employment densities on industrial lands in Kingston will gradually increase relative to existing conditions. For the purpose of the long-term industrial land needs analysis, a density of 25 jobs per net Ha (10 jobs per net acre) is assumed.

Based on these assumptions, Kingston is forecast to absorb an average of 8 net Ha (21 net acres) of industrial land per year over the 2014-2034 period. Average annual absorption is forecast to peak over the 2014-2019 period and gradually decline thereafter. Over the 20-year period, total industrial land demand is forecast to total 166 net Ha (410 net acres).

In accordance with the existing supply of developable designated vacant industrial lands, the City of Kingston has a sufficient supply of designated industrial lands to meet long-term needs to 2034. As of 2034, a net surplus of 50 net Ha (124 net acres) has been identified.

Though Kingston appears to have a sufficient supply of urban industrial lands to meet long-term needs to 2034, the market choice of vacant prestige industrial lands and supply of City-owned lands is more limited, which could constrain forecast market demand if not addressed.

Maximizing Utilization of Developed Industrial Lands

As previously highlighted, 10% of forecast employment growth on industrial lands in Kingston is anticipated to be accommodated through intensification. To help meet this

target, the City needs to better understand intensification opportunities on its industrial lands. Though it was beyond the scope of this review to complete a comprehensive industrial lands intensification study, the Consultant Team reviewed, on a high level, the degree to which developed industrial land parcels are currently utilized. The Consultant Team identified a total of 144 Ha (356 acres) of developed industrial lands within the City which are considered underutilized. This represents approximately 21% of the total developed industrial lands base. Many of these sites are located in the City's more mature industrial areas. Major redevelopment sites identified include the J.S.M. Property and the Creekford Road Area.

Identifying and evaluating intensification opportunities against market demand is challenging. The intensification potential of underutilized industrial lands will largely be determined by future development plans of existing or future landowners which are highly speculative. Nonetheless, Kingston has a significant number of underutilized parcels and infill and redevelopment of existing developed lands will occur over time, largely driven by market demand for land development opportunities. To effectively assess and evaluate intensification potential and opportunities, and to ensure that the City can meet the identified intensification target, a comprehensive city-wide industrial lands intensification strategy should be undertaken.

Assessment of Competitiveness and Investment Readiness of Industrial Areas

The future competitiveness of Kingston's economic base is dependent, in part, on the attributes of its industrial areas. As part of this review, Kingston's industrial areas were assessed to better understand their potential to accommodate future industrial land demand and growth within key sectors. Consideration was given to physical/economic characteristics, access/circulation, development opportunities and target sector attractiveness. Based on the employment sector requirements identified and the evaluation of Kingston's industrial areas, the following conclusions can be made regarding the potential for Kingston to accommodate forecast industrial growth:

- The Gardiners Road Industrial Area, Cataraqui Estates Business Park and the St. Lawrence Business Park are the best positioned of Kingston's industrial areas to accommodate a wide range of industrial uses. The parks' supply of shovel-ready lands in proximity to Highway 401, is attractive for a broad range of uses, including distribution/logistics, transportation and manufacturing, while also offering opportunities to accommodate office development and "knowledge-based" sectors and other non-industrial uses.

- Kingston's older industrial areas – the Alcan Industrial Area, Old Industrial Area and Progress Industrial Area, have limited market potential for industrial development given their distance/access to Highway 401 and limited shovel-ready industrial land supply. The Old Industrial Area does offer longer term potential through a broad number of redevelopment opportunities that may be attractive for business park type development, including office accommodating “knowledge-based” sectors.
- The Nortel Industrial Area is not considered competitive for industrial development but does hold redevelopment potential for other uses.
- Innovation Park offers a unique opportunity to accommodate “knowledge-based” sectors for a range of small to mid-sized businesses. However, its size and configuration limits its market potential at present.
- Clyde Industrial Area, though well located geographically, is approaching buildout and has limited opportunities for development.
- The Airport Industrial Lands currently have limited industrial development potential but their market potential is anticipated to increase with a future Airport expansion.
- Alcan Business Park is one of the City's best examples of a prestige business park, however, its limited shovel-ready lands restricts its ability to accommodate further development.
- Though there is significant growth potential in sectors that are best accommodated in prestige employment/business parks, the City has a lack of shovel-ready lands available to accommodate these uses.

Industrial Lands Conversions

As with many other communities across Ontario, there is pressure for the City to convert designated vacant industrial lands to non-employment uses, namely commercial retail and residential uses. This is often driven by higher demand (and hence higher market values) for commercial and residential development than industrial lands development.

The Consultant Team recognizes that there is a need to preserve Kingston's industrial lands for employment uses as the conversion of industrial lands to non-employment uses can negatively impact Kingston's economy.

It is recognized that under some circumstances, a conversion may be justified for planning and economic reasons, but such decisions must be made using a systematic approach and methodology. This comprehensive review establishes an evaluation framework in accordance with the P.P.S. and the City's O.P. for converting industrial

lands to non-employment uses. The review included industrial lands where an active employment conversion application has been submitted to the City or the property owner has expressed interest to do so. The review also considered sites where the conversion to a non-employment use may be warranted from a land-use planning and economic perspective. The review identified twelve sites for conversion to non-employment uses. This includes the former Nortel lands which are recommended for conversion to a mixed-use designation. One site for conversion from non-employment to employment use was also identified.

Though the City of Kingston O.P. does not encourage the conversion of industrial lands to non-employment uses, the industrial sites recommended for conversion are warranted from a planning and economic perspective. The recommendations are based on established O.P. policy and constitute good planning. The recommended conversions do not undermine the City's ability to accommodate future industrial land demand.

The City's Future Role in Industrial Land Development

The City of Kingston has a strong tradition of successful municipal industrial/business park development. Historically, industrial land prices in Kingston, as in other eastern Ontario municipalities, have been too low to facilitate broad private-sector development of industrial lands, requiring the City to act as a land developer. Though industrial land prices are expected to continue to appreciate over time, it is not expected that land prices will reach levels to permit wide-scale private-sector development of industrial lands over the forecast period. From a market demand perspective, the City will likely need to be involved in industrial land development for the foreseeable future, though there may be opportunities to partner with external parties on select projects through public-private partnerships.

Recommendations for Accommodating Forecast Growth on Industrial Lands

The timing and phasing of new shovel-ready land supply during the forecast period is vital to accommodate anticipated demand. It is also important that the City promote the redevelopment of a number of its developed but underutilized industrial lands to accommodate a portion of forecast industrial land need.

Currently Available Serviced Shovel-ready Supply

At the anticipated rate of absorption, the City-wide supply of currently serviced and available vacant industrial land is expected to be completely absorbed by approximately

2027, with City-owned lands becoming exhausted sooner. However, a few large-scale developments could exhaust this supply in a relatively short time frame. Further, to ensure that Kingston's industrial land supply is not unduly constrained, it is recommended that Kingston maintain a minimum 5-year supply of serviced and available lands at all times to allow for adequate market choice within the vacant industrial land inventory. Based on this criterion, Kingston's supply of shovel-ready industrial lands is anticipated to fall below the threshold required to maintain sufficient market choice by approximately 2021.

Expansion of Medium-Term Land Supply (5-10 years)

It is critical that new serviced industrial lands become available in the medium term (within the next 10 years) to ensure that the City has sufficient market choice of industrial lands to meet forecast demand. To ensure this, it is recommended that:

- **The remaining unserviced designated industrial lands within the Cataraqui Estates Business Park (49 Ha) be serviced by 2021.** For these subject lands, the western half (16 Ha) is City-owned and the eastern half (33 Ha) is privately owned by one land owner. It is imperative that the identified planning-related work, including the development of a concept plan and draft plan of subdivision be completed in the near term. Given forecast demand for prestige industrial land, it is recommended that the majority of the lands, including those in proximity to Highway 401, be designated Business Park Industrial.
- **The Deferred Area (47 Ha), consisting of the Clogg's Road Property and former O.R.C. lands, be designated for Industrial use and serviced in the medium term.** It is recommended that the City designate, service and develop the lands for Business Park uses in the medium term. In order to ensure that the lands are available for development in the medium term, it is recommended that the Secondary Plan process be completed in the short term.
- **The City should explore development opportunities with Queen's University and other external partners to expand the shovel-ready land supply within Innovation Park.** This would involve servicing and developing the 20 Ha (50 acres) of vacant designated land currently owned by the University located next to the existing park.

These additional lands are anticipated to add approximately twelve more years to the City's vacant industrial land inventory.

Long-term Land Supply (10+ years)

Over the longer term, the City will need to ensure that other vacant designated industrial lands are serviced and become developable. It is recommended that:

- **The City expand its Urban Boundary to accommodate the Brown property lands immediately north of the St. Lawrence Business Park with the intent of developing these lands over the longer term.** Given the identified shortfall of prestige and City-owned industrial lands, it is recommended that the City expand its Urban Boundary as part of the 2015 O.P. Review to accommodate this area, with the intent of developing the lands west of Butternut Creek (24 Ha) over the longer term. It is recommended that these lands be designated as a “Deferred Area” that will be subject to area-specific phasing policies that will require the City to undertake a Secondary Plan or possibly a detailed Concept Plan process in the short to medium term. These lands should be considered for Business Park Industrial designation through the Secondary Planning process.
- **Develop a secondary plan for the Sydenham Road/Highway 401 Industrial Area and work towards developing the designated industrial lands over the longer term.** Over the longer term, the City should work towards developing these lands for Business Park uses. The subject lands are privately owned and the City should explore options to purchase the lands or jointly develop them with the private sector. In accordance with the City’s O.P., a Secondary Plan should be prepared in the medium term.

Redevelopment of Industrial Lands

While it is important to increase the supply of shovel-ready lands in greenfield areas, it is also a priority for the City to promote intensification and redevelopment within its older industrial areas – namely within the Old Industrial Area and the Alcan Industrial Area in order to meet its intensification target. The following recommendations are provided with respect to the redevelopment of Kingston’s established industrial areas:

- It is recommended that a secondary plan be completed for the Old Industrial Area which considers in part, the recommendations identified herein.
- The northern part of the Wellington Street Extension is required to permit access and to service some of the lands in the Old Industrial Area and also to improve the development potential of the broader area. The Wellington Street Extension is shown on the schedules of the existing O. P. and in the Development Charges By-law.

- The City should redesignate the J.S.M. Property from General Industrial to Business Park Industrial and work with the land owner to maximize the development potential of the property.
- The City should explore options to expand the Alcan Business Park to the south over the longer term, which would involve acquiring a portion of the unused lands of the Novelis site for the purpose of business park development.
- It is recommended that the City prepare a secondary plan for the Alcan Industrial Area.

Marketing Strategy

The City, in collaboration with K.E.D.C.O., should undertake a more comprehensive approach to marketing existing City-owned shovel-ready industrial lands with the aim of increasing industrial land absorption and development activity. This should include development of place-branding for the City's industrial/business parks, preparation of a business attraction package, undertaking sector-based initiatives and utilizing a range of communication tools.

Kingston should strongly align the marketing of its industrial/business parks with the four priority growth sectors (agri-business, sustainable emerging technologies, I.C.T./ defence and healthcare) in K.E.D.C.O.'s Strategic Plan.

Policy and Zoning Evaluation and Recommendations

Conducting a comprehensive review of Kingston's industrial lands provided a key opportunity to assess the effectiveness of the policies and regulations for employment areas. The Industrial Lands Review included a comprehensive evaluation of the City of Kingston's Official Plan (O.P.) policies and Zoning By-Law requirements.

In terms of O.P. policy and Zoning By-law requirements, Kingston is well-prepared to welcome a wide range of proposed development to its employment areas.

The following is a summary of the recommendations resulting from the review of policy and zoning and discussion of trends and issues:

Zoning Recommendations:

- Consider removing or increasing the maximum lot coverage requirement;
- Consider lowering the exterior side yard requirement to 6 m in some or all zones;
- Consider increasing the maximum building height allowance to 30 m;

- Consider reducing parking space requirements for manufacturing and warehousing uses to reflect the low employees-per-hectare density of these land uses;
- Consider reducing the parking area setback (from lot line) requirement to 3 m;
- Consider increasing the threshold where only one loading space is required;
- Consider increasing the threshold where only two loading spaces are required;
- Consider reducing loading space setback requirements and also consider adding screening requirements;
- Consider a slight reduction in required landscaped open space to 15%;
- Consider a reduction in the required width of landscaping strips to 3 m; and
- Explore a zoning approach to help small, space-constrained industrial sites develop at higher intensity during the Comprehensive Zoning By-law project.

Urban Policy Recommendations:

- Any boundary issues between the Business Park Industrial and General Industrial land use designations be assessed as part of the 5-year review of the O.P.;
- Consider incorporating the philosophy of employee quality of life into O.P. policies;
- Consider adding a policy to the O.P. describing the monitoring of office space development;
- Consider requiring development proponents to justify why a certain threshold of office space is appropriate in an employment area rather than in the downtown;
- Consider strengthening the definition of Areas of Employment to explicitly exclude larger scale commercial uses;
- Consider strengthening the Complementary Use policies to direct how these land uses are phased-in and to establish an overall floor space threshold for them;
- Facilitate the clustering of service/amenity uses at collector or arterial road intersections through updated policy and mapping in the Official Plan;
- Clarify the retail sales area policy in the O.P. to emphasize that the retail component related to an employment use is accessory;
- Modify the policies in Sections 3.2 and 3.6 of the O.P. to remove sensitive land uses currently permitted in employment areas;
- Continue to review and update the Brownfield C.I.P.; and
- Add a policy to the O.P. to cross-reference the additional eight conversion criteria developed for the Industrial Lands Review or consider including these additional criteria in Section 3.6.5.

Rural Policy Recommendations:

- In accordance with the City's O.P. policies with respect to rural industrial development, the following recommendations are provided:
 - Continue to concentrate rural industrial development to the McAdoo's Lane area. To accomplish this, it is recommended that additional rural lands be designated along the south side of McAdoo's Lane, subject to an area-specific study of opportunities and constraints;
 - Develop location criteria which directs future rural industrial development to specific areas designated for rural industrial development in the upcoming 5-year O.P. review;
 - Discourage scattered industrial development in the rural area outside of defined rural development clusters; and
 - Relocate the "eco-friendly" policy from the Rural Industrial designation and integrate it with Official Plan Section 3.6.10, and re-word it to emphasize sustainable development.

1. Introduction

1.1 Terms of Reference

The City of Kingston retained Watson & Associates Economists Ltd. in association with Dillon Consulting Limited hereafter referred to as the Consultant Team, to prepare an Employment Land Strategy Review (E.L.R.).

The purpose of developing an E.L.R. is to create a long-term vision and plan for future industrial (employment) lands within the City of Kingston, in keeping with the provincial policy direction provided under the Provincial Policy Statement 2014 (P.P.S.) and the City's Official Plan (O.P.).

A primary objective of the E.L.R. is to ensure that Kingston continues to develop as a competitive, well-balanced and sustainable community. The E.L.R. also supports the City's economic development objectives to ensure that Kingston is competitive with respect to future business retention and attraction in the community. The E.L.R. was developed under the framework of a comprehensive review. The E.L.R. was developed in two phases:

Phase 1 - Industrial Land Profile and Needs Analysis – includes examination of Kingston's key industrial areas and recent development trends and identifies future industrial land needs based on existing vacant industrial land supply and forecast demand. A review of macro-economic trends and influences on industrial lands development, and a municipal comparative analysis which assesses the competitiveness of Kingston's industrial lands, are also provided.

A stakeholder consultation process was also incorporated into the study which comprised of a public open house and development community workshop. Development community stakeholders were also consulted through telephone interviews to obtain their perspectives on the Kingston industrial land market in terms of its general health, opportunities/challenges and recent trends. The key findings of the stakeholder consultation are presented in Appendix A.

Phase 2 – Industrial Land Strategy – provides guidance and direction regarding the management and development of Kingston's industrial lands. This includes a review of the City's industrial land designations and zoning as well as an assessment of Kingston's industrial areas in terms of competitiveness and investment readiness. Direction on the redevelopment potential of underutilized industrial lands and an

evaluation of potential industrial land conversions are also provided. A number of policy recommendations are also presented.

A second public open house was held to present the findings of Phase 1 and 2, and a corresponding draft report was released to the public. Written submissions received regarding the draft report are summarized in Appendix B.

Phases 1 and 2 are consolidated under one cover as presented herein.

1.2 What are Industrial Lands?

Industrial lands (also known as employment lands) typically include a broad range of designated lands, including light, medium and heavy industrial lands, business parks and rural industrial lands. Industrial lands accommodate primarily export-based employment, including a wide range of industrial uses (e.g. manufacturing, distribution/logistics, transportation services) as well as specific commercial and institutional uses (e.g. office, service, ancillary/accessory retail) which generally support the industrial/business function of the employment area.

1.3 Why are Industrial Lands Important?

Industrial lands form a vital component of Kingston's land use structure and are an integral part of the local economic development and employment growth potential. They are home to many of Kingston's largest private-sector employers, including Novelis, Invista Canada, SYSCO, Startek and TDL.

Through development of the industrial land base, the City is better positioned to build a more balanced and complete community. Development typically accommodated on industrial lands generates relatively strong economic multipliers that benefit Kingston directly and indirectly. In addition, industrial land development typically generates high-quality employment opportunities which can improve socio-economic conditions within the community. Furthermore, achieving non-residential growth adds to a community's assessment base, which can help support lower residential taxes and municipal service levels. Industrial land development also tends to produce more positive net fiscal benefits for the community than other types of development. Thus, a healthy balance between residential and non-residential development is considered highly important to maintaining the economic and fiscal sustainability of Kingston.

2. Macro-Economic Trends Influencing Industrial Land Development

The following provides an analysis of the macro-economic factors which are anticipated to influence regional and local employment growth trends and corresponding demand for industrial land.

2.1 Macro-Economic Trends

2.1.1 Ontario Economic Outlook

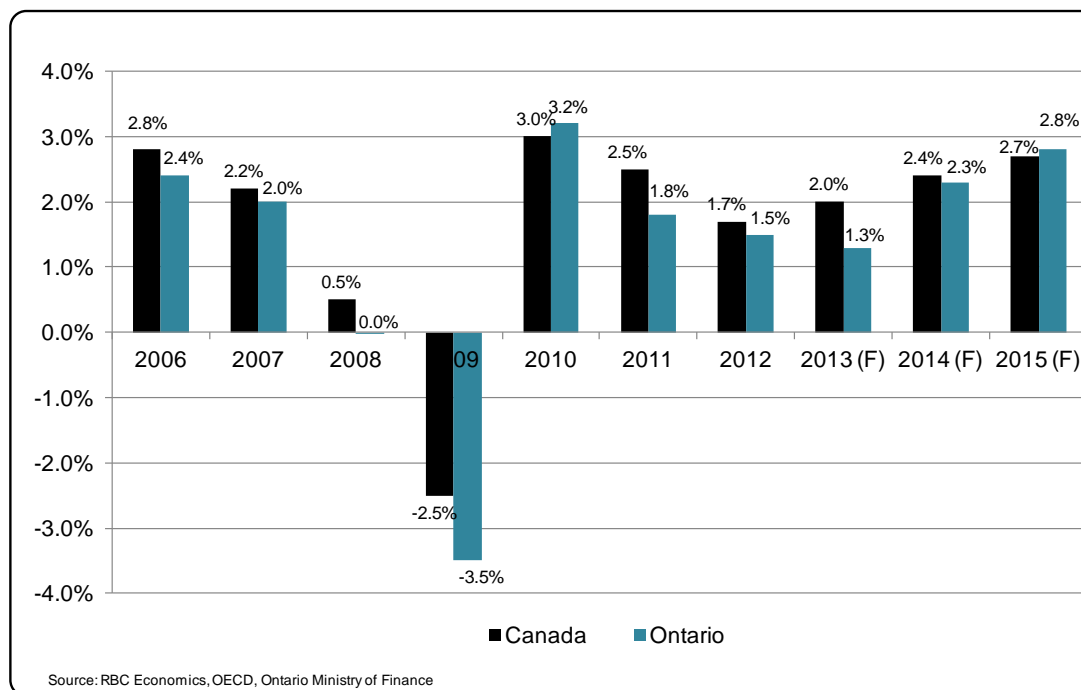
The Canadian economy has achieved modest G.D.P. growth since the global economic recession of 2008/09 but has not yet regained economic growth levels experienced prior to the recession, as illustrated in Figure 2-1. The economic recession hit Ontario relatively hard with significant declines in manufacturing output, particularly in the auto sector and in construction. While the Ontario economy has also seen a rebound in economic activity since 2010, the rate of growth has been marginally lower than the national growth. The Province is expected to see significantly stronger annual G.D.P. growth in 2014 and 2015 of 2.3% and 2.8%, respectively. The stronger growth is attributed, in part, to an improvement in the economic outlook in the United States and an improving export market. However, the strength of the recovery of Ontario's export-based sectors will hinge largely on the longer term economic health of the global and U.S. economies and the Canadian/U.S. dollar exchange rate.

The long-term value of the Canadian dollar will influence the health and nature of the provincial economy, particularly the export-oriented goods producing sectors. A high Canadian dollar relative to the U.S. dollar has posed challenges for Ontario's export-based sectors in recent years. Given that over 80 percent of Ontario's international exports are destined for the United States, the Canada-U.S. currency exchange rate is particularly relevant for Ontario.¹ Over the last year, the Canadian dollar has steadily depreciated against the U.S. dollar (valued at approximately \$0.80 U.S.D. as of late January, 2015) and is now trading close to its 25-year historical average value. Over the near term, the Canadian dollar may depreciate further in value against the U.S. dollar which should help stimulate manufacturing and other export-based sectors. However, the highly competitive nature of the manufacturing sector will require

¹ Ontario's Long-term Report on the Economy, Ministry of Finance, Government of Ontario, 2010.

production to be increasingly cost effective and value-added oriented, which bodes well for firms that are specialized and capital/technology intensive.

Figure 2-1
Annual Real GDP Growth, Ontario and Canada
Historical (2003-2012) and Forecast (2013-2015)

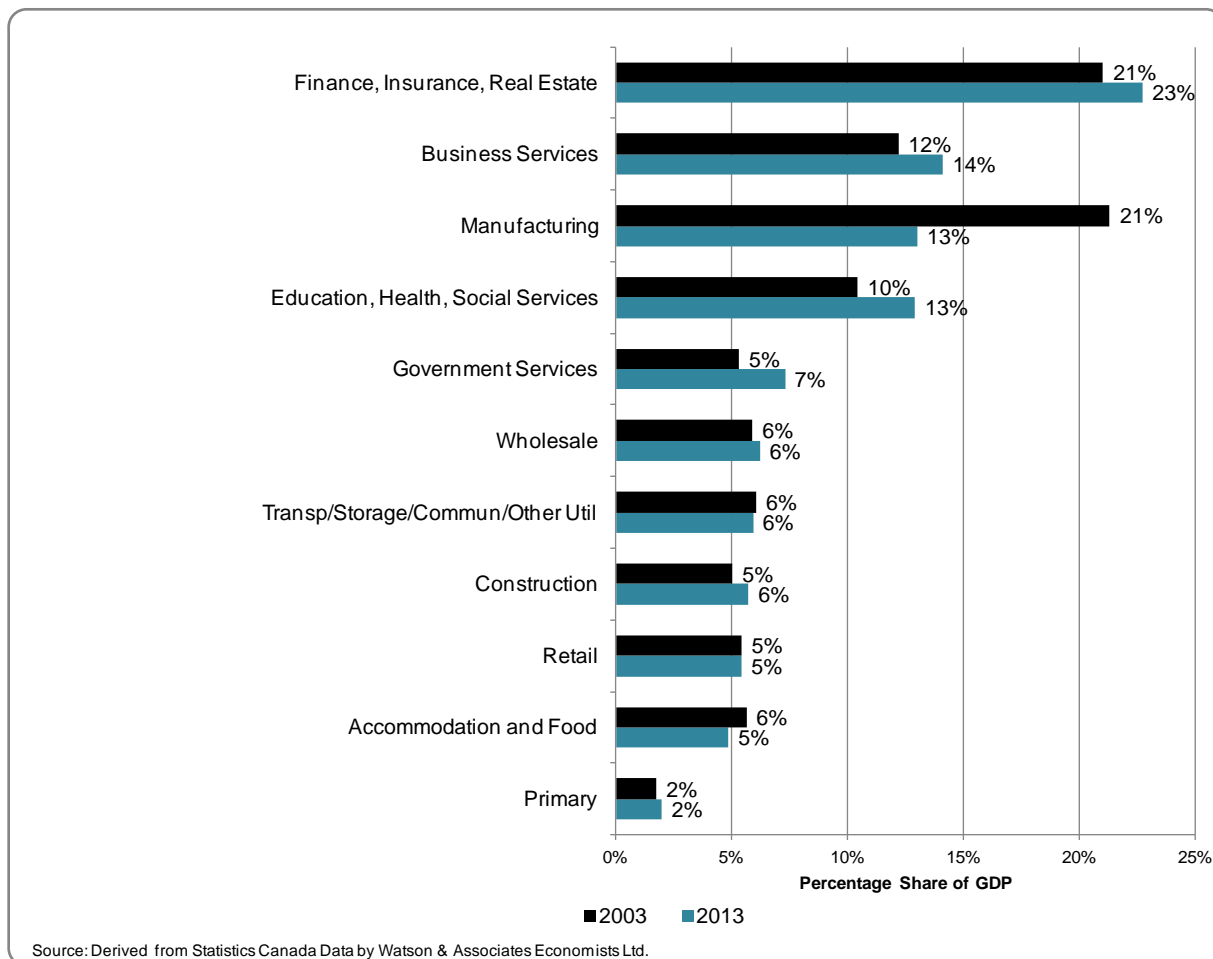


2.1.2 Shift in the Provincial Economic Structure

Over the past decade, the economic base, as measured by G.D.P. output, has shifted from goods-producing sectors (i.e. manufacturing) to service-producing ones. Much of this shift has occurred in the past five years, with the onset of the economic recession and the appreciation of the Canadian dollar. As illustrated in Figure 2-2, manufacturing, a significant component of the provincial economy, has seen its share of G.D.P. decline from 21% to 13% between 2003 and 2013 largely as a result of increased global competition. The challenges in the manufacturing sector are reflected in the employed labour force level in the sector, which has declined by 27% over the 2003-2012 period.¹ In contrast, service-based sectors, such as financial and business services, have seen significant increases over the period. Growth in the service-based sectors has been driven by strong growth in domestic demand, particularly in consumer spending.

¹ Derived from Statistics Canada Labour Force Survey data by Watson & Associates Economists Ltd.

Figure 2-2
Province of Ontario Gross Domestic Product by Sector,
2003 and 2013¹



2.2 Evolving Nature of Industrial Lands

Structural changes in the economy are changing the character of economic activities on industrial lands and impacting the built form and character of industrial areas. Over the past decade, the composition of industrial development in Ontario has evolved, with less emphasis on the manufacturing sector. Increased outsourcing of manufacturing production to emerging global markets continues to erode the existing domestic manufacturing base and shift future employment opportunities abroad. Increasingly, domestic manufacturers are required to streamline production through increased product innovation, specialization and automation to remain competitive.

While the manufacturing sector has been generally stagnant, there have been growth opportunities in other forms of industrial development. Post-recession industrial

development has been largely oriented to large-scale industrial buildings housing wholesale trade, distribution and logistics. This has been driven by increasing demand in the “goods movement” sector to store and manage the distribution/transportation of goods produced both locally and imported from abroad. These facilities tend to be land-extensive and typically located in greenfield areas which are accessible and offer future expansion potential.

There has also been market demand to accommodate an increasing share of non-industrial development on industrial lands. This is driven largely by a significant growth in the “knowledge-based” or “creative class” economy which includes professional, scientific and technical services, finance, insurance and real estate. These sectors are largely accommodated within office development and typically located within prestige employment areas. Further, there is increasing interest to accommodate other complementary commercial and institutional uses on industrial lands to create a more mixed-use environment.

2.3 Observations

The macro economy has experienced significant volatility in the past decade, including a period of strong economic growth followed by an economic recession and subsequent modest recovery. Recent trends suggest a positive outlook for the national and provincial economies, comprised of moderately strong economic growth. However, the past decade has been a period of considerable change for the Ontario economy, as it has shifted from a goods-producing to an increasingly service-sector-based economy.

Recent structural changes in the economy have created many challenges and opportunities for municipalities as the role of industrial lands continues to evolve. As such, industrial land stewardship is of increasing importance to ensure long-term sustainability and competitiveness.

3. Regional Competitiveness Analysis

At the local level, the competitiveness of Kingston's industrial lands is determined by a number of factors, including, but not limited to, location, transportation access, access to labour, availability of vacant industrial lands and development costs. These factors are explored herein.

3.1 Kingston's Key Attributes

Location

Location plays a key role in the geographic distribution of the dominant industry clusters visible across Ontario today. Kingston benefits from its location along Highway 401, which serves as Canada's major trade corridor and links major urban centres in Ontario and Quebec to the United States. Kingston's industrial lands are centrally located to serve major North American employment markets in eastern Ontario, Quebec and the north-eastern U.S.

Synergy with Post-secondary/Government Institutions

Kingston offers an unparalleled concentration of post-secondary and government institutions (e.g. Queen's University, Royal Military College, St. Lawrence College, Canadian Forces Base Kingston, Corrections Canada) to serve as a catalyst for the continued growth of the "knowledge-based" and "creative-class" economy within the City. Queen's University, as a graduate university, has significant research and development activities in the community. The University's Innovation Park (discussed in more detail in Chapter 4) represents a key step in leveraging and developing synergies with related employment cluster(s) and supporting institutional and government entities in the community.

Skilled Labour Force

Kingston boasts a highly skilled labour force which is attractive for both international and locally based industries. Kingston has a relatively high share of residents that have a university bachelor's degree or higher when compared to other Ontario municipalities of similar size and municipalities in the surrounding market area.

Quality of Life

Kingston offers a high quality of life, consistently ranked as one of the best communities in Canada in which to live. Quality of life is becoming an increasingly important attribute, particularly within the knowledge-based sectors, with workers increasingly determining their place of residency based on quality of life attributes and employers attracted to locate to these communities based on the labour force pool.

3.2 Municipal Comparative Analysis

Municipalities compete directly for business attraction with other communities in the regional market area and beyond. Kingston has a number of competitors along the Highway 401 corridor in central and eastern Ontario with which it competes for business attraction and retention. These municipalities also offer location and other regional attributes which appeal to prospective international and local firms. The degree to which Kingston can capitalize on its regional location advantages will depend largely on the competitiveness of its industrial lands.

The competitiveness of Kingston's industrial lands is explored herein in comparison to a number of municipalities within the surrounding market area, including:

- City of Belleville;
- City of Brockville;
- City of Cornwall;
- City of Quinte West;
- Loyalist Township; and
- Town of Greater Napanee.

The City of Kingston's competitive position is compared to the above-mentioned municipalities and evaluated based on the review of supply of industrial lands and development costs.

3.2.1 Supply of Vacant Industrial Lands

The competitiveness of Kingston's export-based economy is partly determined by the availability and quality of its developable industrial lands. The following provides a

summary of the supply of designated and shovel-ready¹ industrial lands within Kingston and the surveyed municipalities in the surrounding market area.

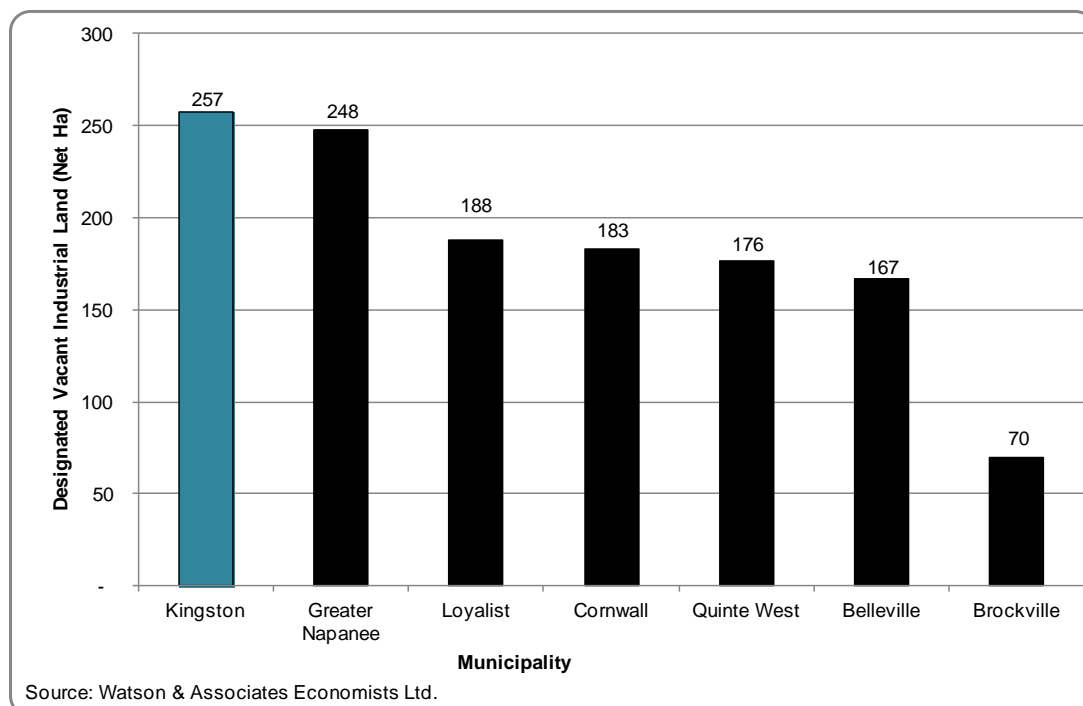
Supply of Designated Vacant Industrial Lands

Figure 3-1 summarizes the total designated vacant industrial land by surveyed municipality. Key findings include:

- Kingston has 257 net Ha (635 net acres) of designated vacant industrial land, the most among the surveyed municipalities;
- Greater Napanee has slightly less designated vacant industrial land than Kingston, while Loyalist, Cornwall, Quinte West and Belleville have marginally less; and
- Brockville has the least amount of designated industrial lands of the surveyed municipalities with 70 net Ha (173 net acres).

Figure 3-1

City of Kingston and Surrounding Market Area Municipalities Total Designated Vacant Industrial Land



¹ Shovel-ready industrial lands are defined as vacant parcels which are serviced with existing municipal water, sewer, stormwater and roads infrastructure. In addition, all planning and environmental approvals are in place.

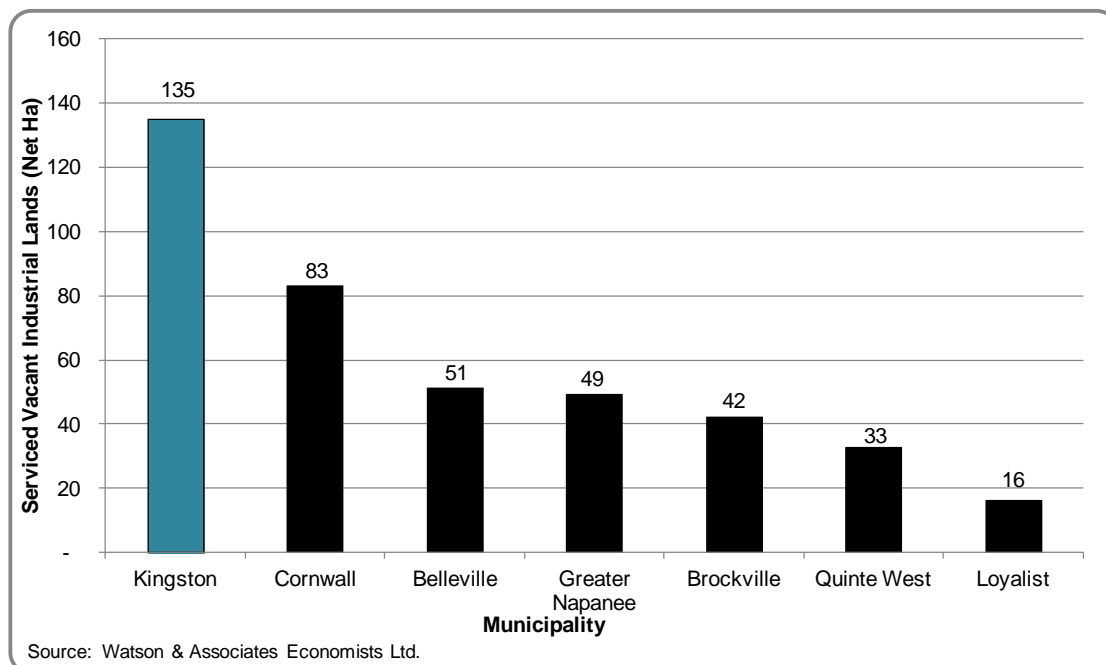
Supply of Shovel-ready Vacant Industrial Land

The supply of shovel-ready lands is a key measure of a municipality's economic competitiveness. Figure 3-2 summarizes the supply of serviced shovel-ready industrial lands within the surveyed municipalities. Key observations include:

- Kingston has 135 net Ha (333 net acres) of vacant developable serviced industrial land, the highest supply of the surveyed municipalities;
- Cornwall, Belleville, Greater Napanee and Brockville have significantly less shovel-ready industrial land than Kingston;
- Quinte West and Loyalist have the smallest supply of shovel-ready land, totalling 33 net Ha (82 net acres) and 16 net Ha (40 net acres), respectively.

Figure 3-2

City of Kingston and Surrounding Market Area Municipalities Serviced Vacant Industrial Land



3.2.2 Cost of Development

A significant factor influencing business decisions on where to locate is the cost competitiveness (both capital investment and operating costs) of the development in relation to the market demand and potential return on investment.

On a regional level, cost competitiveness for business is largely associated with macro-economic factors such as wage rates, corporate income taxes and the dollar exchange rate. On a municipal level, cost competitiveness varies based on a number of factors, including land prices, development charges (D.C.s), property tax rates and utility costs. Industrial land prices, development charges/impost fees and property taxes are explored herein from an industrial development perspective.

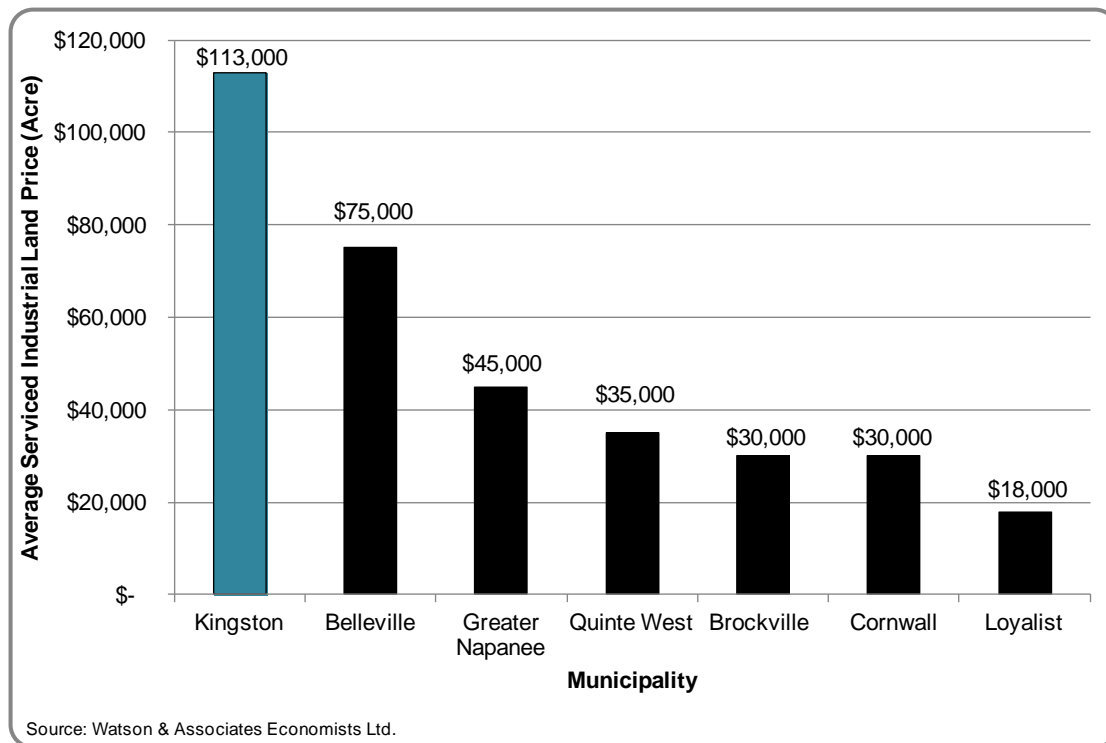
Price of Serviced Industrial Land

From a competitiveness perspective, land prices can provide a key advantage, especially for land expansive uses such as transportation, wholesale trade/logistics, warehousing and large scale manufacturing. Though competitive land costs provide an economic advantage in terms of the cost of development, very low land prices may be indicative of low demand.

Figure 3-3 summarizes industrial land prices (\$/serviced acre) for the City of Kingston and the surrounding market area based on recent market survey data. Key findings include:

- Serviced industrial land prices in Kingston average \$113,000 per acre, which is the highest of the surveyed municipalities; and
- In comparison, industrial land prices in Belleville average \$75,000 per acre, while land prices in Greater Napanee, Quinte West, Brockville, Cornwall and Loyalist are significantly lower, ranging between \$18,000 and \$45,000 per acre.

Figure 3-3
City of Kingston and Surrounding Market Area Municipalities
Average Price of Serviced Vacant Industrial Land



Municipal Industrial Tax Rates

Property tax rates represent a consideration for business location decisions, since taxes impact operating profit annually. Figure 3-4 illustrates industrial tax rates in the municipalities surveyed. Key observations are:

- Kingston's industrial tax rate is close to the survey average, moderately lower than in Brockville or Cornwall and slightly higher than in Belleville; and
- Industrial tax rates in Quinte West, Loyalist and Greater Napanee are marginally lower than in Kingston.

Figure 3-4
City of Kingston and Surrounding Market Area Municipalities
Industrial Property Tax Rates, 2014

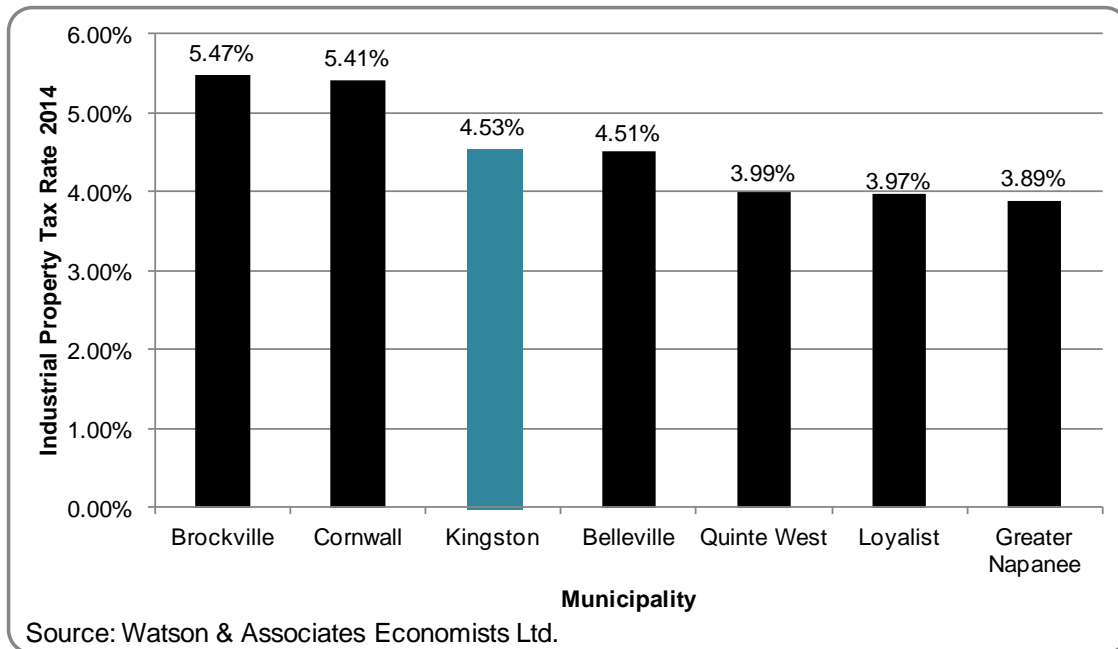
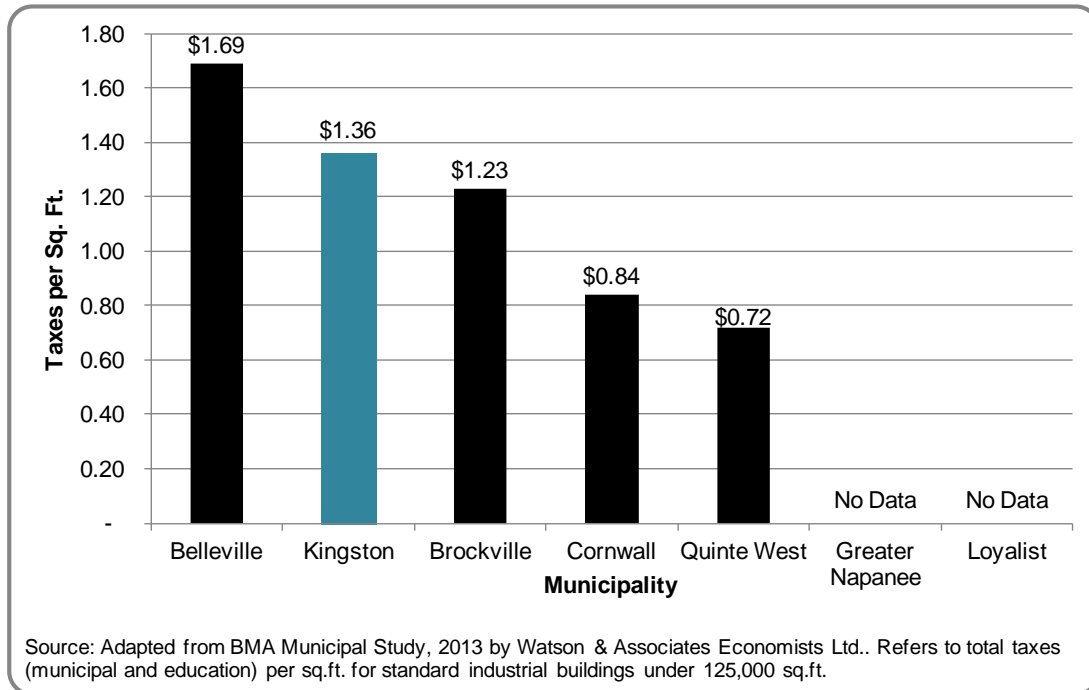


Figure 3-5 summarizes the annual property taxes, expressed on a per sq.ft. basis, for a comparable industrial development in the surveyed municipalities based on data from the BMA Municipal Study 2013. As shown, property taxes on industrial buildings in Kingston are moderately lower than in Belleville, but marginally higher than in Brockville and significantly higher than in Cornwall and Quinte West. Comparative data was unavailable for Greater Napanee and Loyalist Township.

Figure 3-5
 City of Kingston and Surrounding Market Area Municipalities
 Annual Property Taxes (per Square Foot) for a Comparable
 Industrial Development

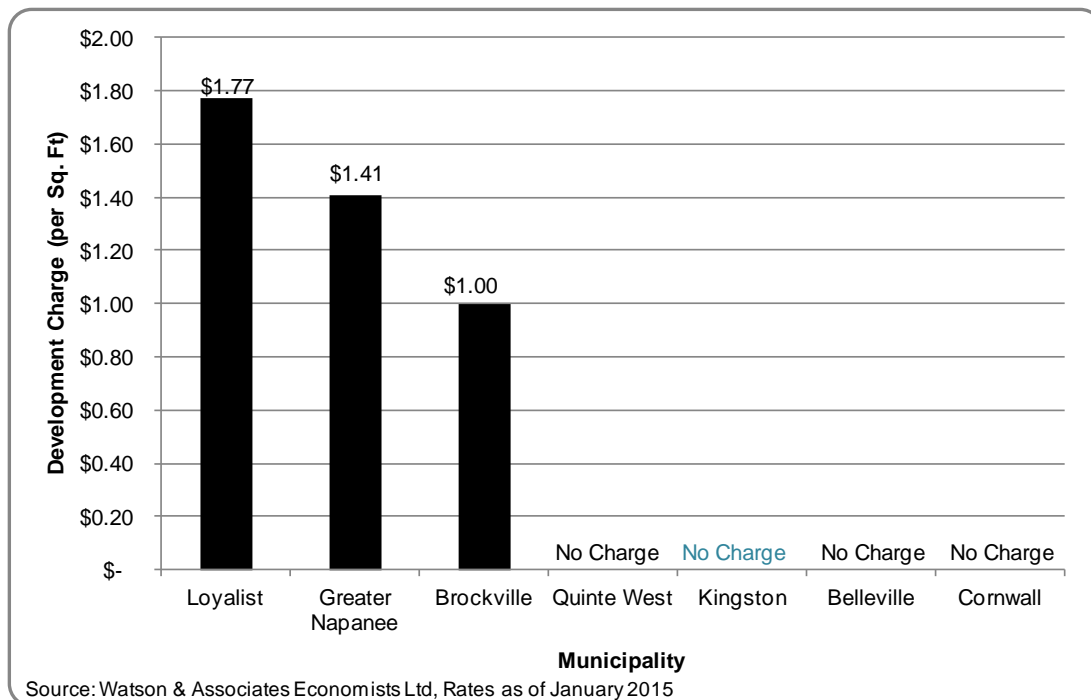


Industrial Development Charge Rates/Impost Fees

Development charges and impost fees are also a component of total development cost. Figure 3-6 summarizes the combined industrial development charge rates and impost fees, where applicable, in the surveyed municipalities. Key findings are:

- Kingston, as well as Quinte West, Belleville and Cornwall have exempted industrial development charges/impost fees for industrial development, which provides a competitive advantage over the other municipalities surveyed; and
- Loyalist Township has the highest industrial development charge/impost fee (\$1.77 per sq.ft.) followed by Greater Napanee (\$1.41) and Brockville (\$1.00).

Figure 3-6
City of Kingston and Surrounding Market Area Municipalities
Industrial Development Charge/Impost Fee



3.3 Observations

Based on the comparison of the surveyed municipalities and through consultation with the development community, the following observations regarding Kingston's competitive position in the industrial land development market can be drawn:

- Kingston is well located geographically along the Highway 401 corridor and is accessible to a range of markets in Central Canada and the north-eastern United States;
- Significant opportunities exist to build synergies with Kingston's three post-secondary institutions (i.e. Queen's University, Royal Military College and St. Lawrence College);
- Kingston's economy and industrial land development potential is greatly influenced by the government sector;
- Kingston offers a high quality of life which is an increasingly important attribute for both employers and employees;

- Kingston has a highly skilled labour force which is well suited for knowledge-based sectors, though the supply of labour with trade skills is less prominent and a potential disadvantage for some industrial sectors;
- Kingston has the largest supply of designated and shovel-ready industrial land of the municipalities surveyed; and
- Industrial development costs in Kingston are generally competitive, albeit industrial land prices are higher in Kingston than in the surveyed municipalities, which may put the City at a disadvantage in attracting land expansive users. However, the City has exempted industrial development from development charges/impost fees and has competitive industrial taxes which are favourable from a cost of development perspective.

4. Kingston's Economic Structure and Profile of Industrial Lands

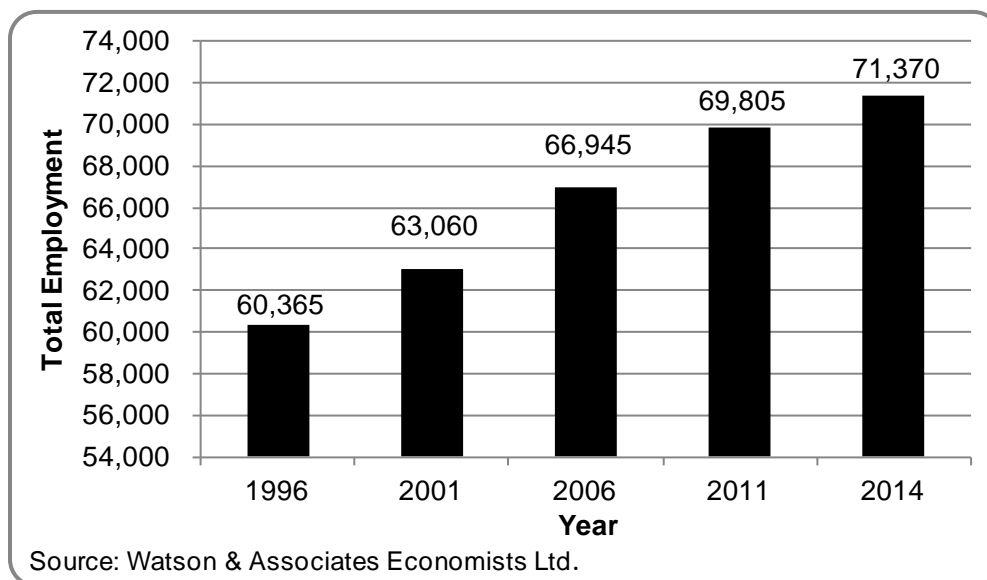
The following provides a review of Kingston's economic structure, including existing conditions and growth trends, and a profile of industrial areas.¹

4.1 Kingston's Economic Structure

4.1.1 Employment Growth Trends

Figure 4-1 summarizes total employment (i.e. jobs) for the City of Kingston from 1996 through to 2014. As shown, Kingston's total employment has increased from approximately 60,400 in 1996 to an estimated 71,400 in 2014, an increase of 11,000 over the period (average annual employment growth of approximately 600 jobs). This represents an annual average employment growth rate of 1.3%. Since 2006, employment growth has slowed to 0.8% annually, which is slightly higher than the provincial growth rate over the same period.

Figure 4-1
City of Kingston
Total Employment, 1996-2014

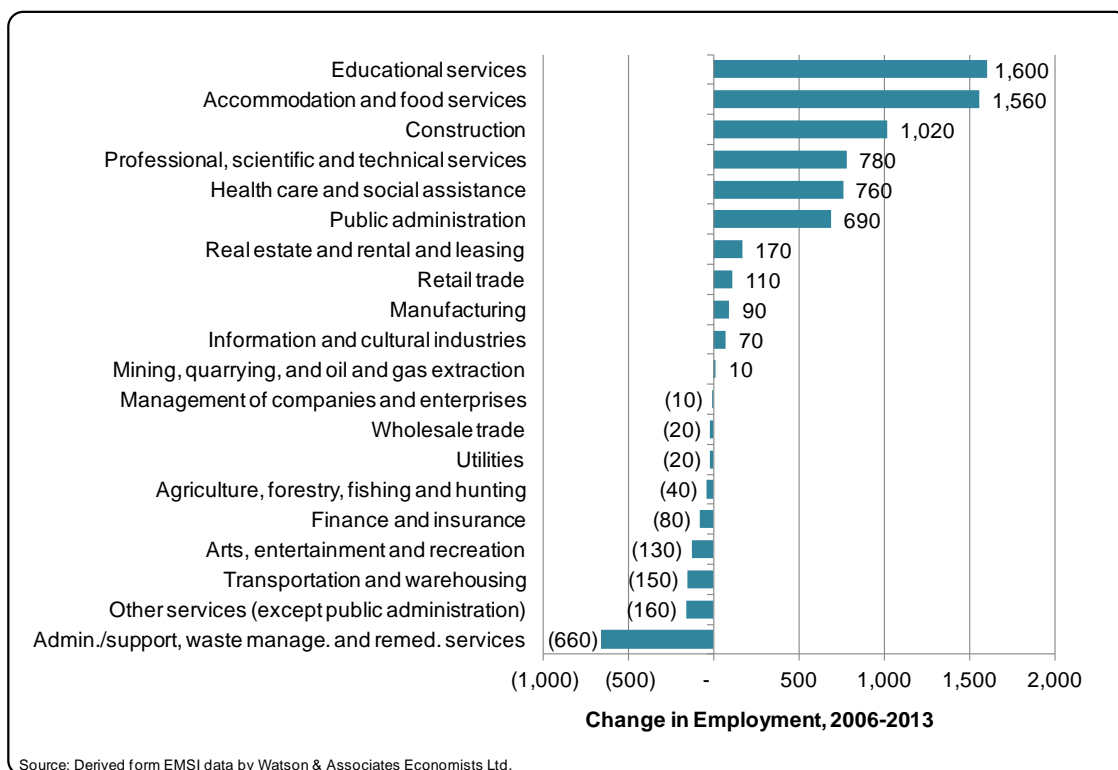


¹ The time series data presented varies subject to data availability.

Similar to the provincial economy as a whole, the nature of the Kingston economy is changing. Over a number of years, the composition of Kingston’s employment base has gradually shifted from the goods-producing sector to the service sector, including education, health care, accommodation and food, and business services sectors.

Figure 4-2 illustrates the employment change by industry sector over the 2006-2013 period in Kingston. As shown, over the period, the fastest growing employment sectors were in service-producing sectors, including educational services, accommodation and food services, professional, scientific and technical services, health care and social assistance and public administration. Of the industrial sectors, only the construction sector demonstrated strong employment growth. In comparison, manufacturing showed a slight increase in employment growth and transportation/warehousing and wholesale trade exhibited slight declines.

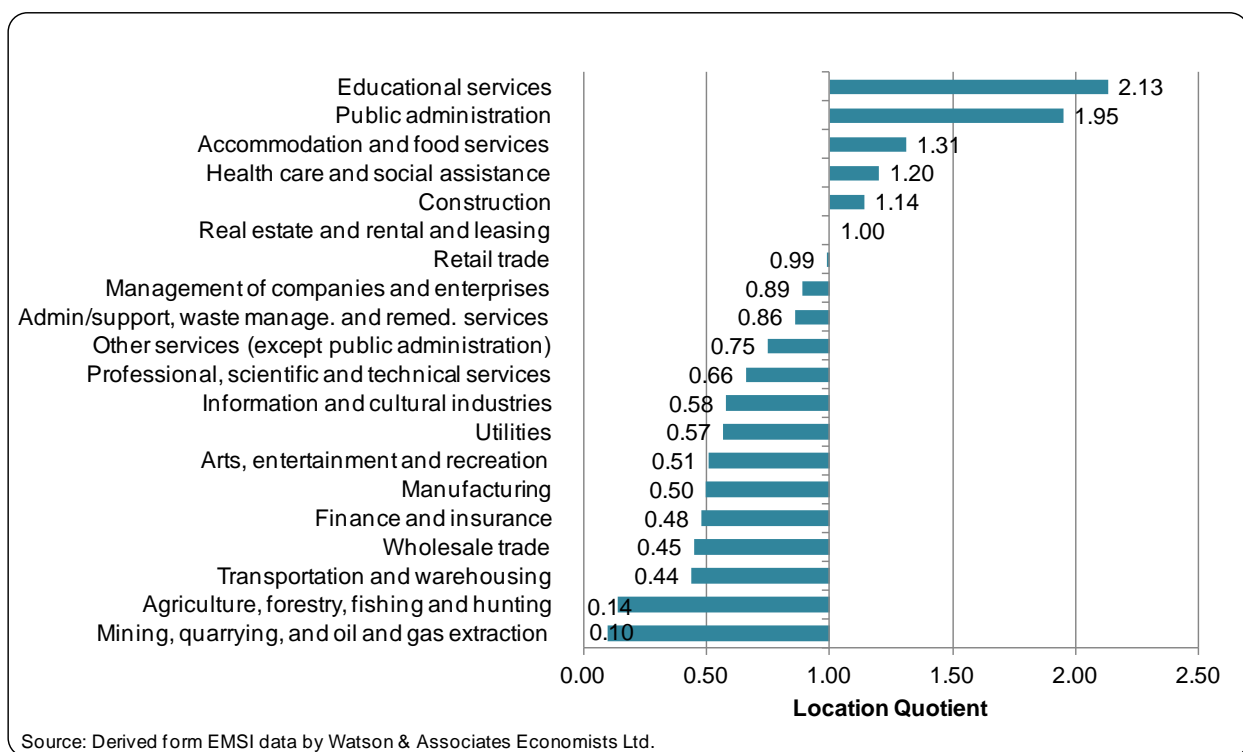
Figure 4-2
City of Kingston Employment Growth, 2006-2013



4.1.2 Industry Clusters in Kingston

Figure 4-3 illustrates the strength of employment sectors in the City of Kingston relative to the Province using Location Quotients (L.Q.).¹ As shown, Kingston's economy is largely oriented towards educational services, public administration, accommodation and food services, health care and social assistance and construction. Kingston has a relatively low concentration of employment in a number of industrial sectors, including utilities, manufacturing, wholesale trade and transportation and warehousing.

Figure 4-3
City of Kingston Location Quotient Relative to Ontario, 2013

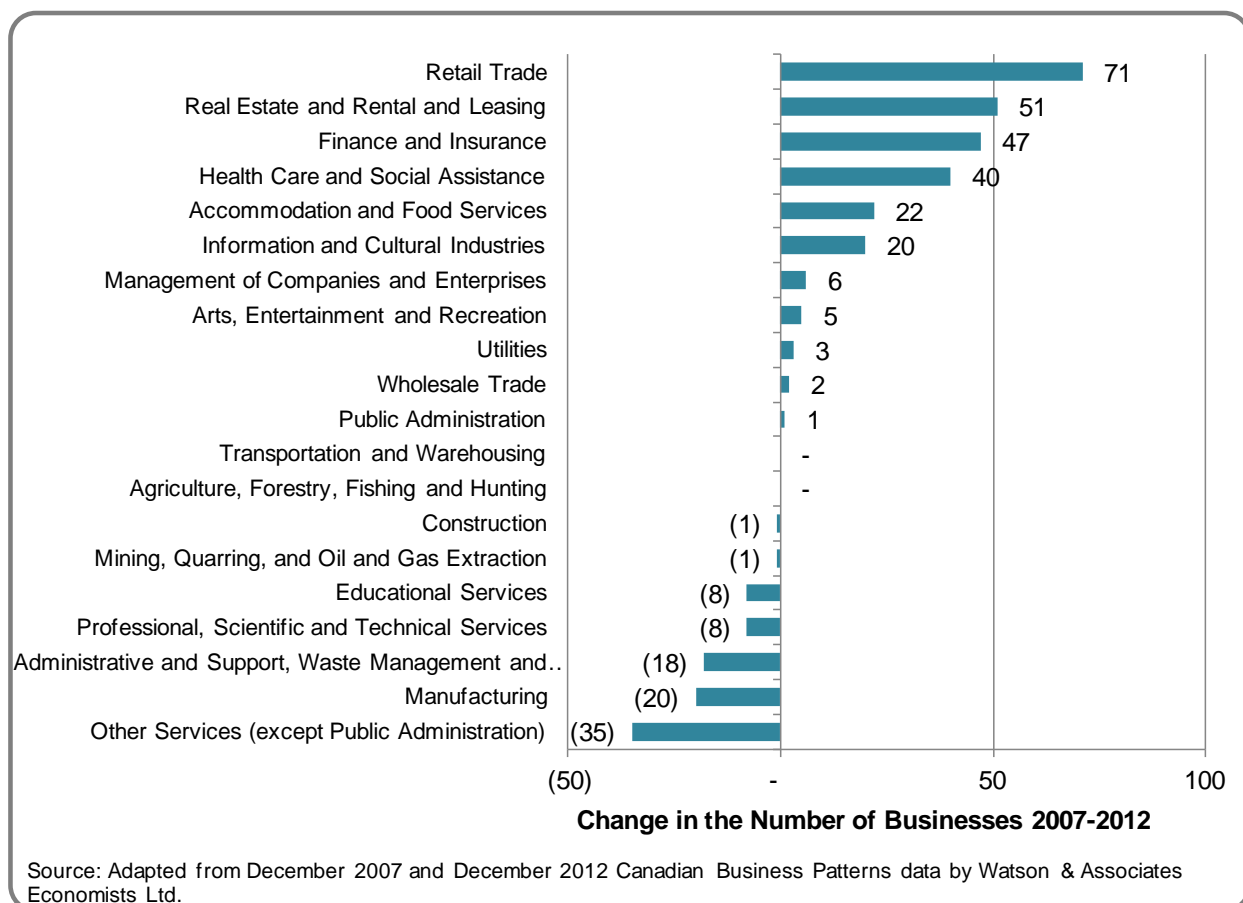


¹ An L.Q. of 1.0 identifies that the concentration of employment by sector is consistent with the broader employment base average. An L.Q. of greater than 1.0 identifies that the concentration of employment in a given employment sector is higher than the broader base average, which suggests a relatively high concentration of a particular employment sector or “cluster.”

4.1.3 Business Growth by Sector, 2007-2012

Figure 4-4 illustrates changes in the number of businesses operating in Kingston by sector over the 2007-2012 period. This review provides insight into recent trends in business activity by sector. As shown, Kingston experienced relatively strong business growth in a number of service sectors including retail trade, real estate and rental leasing, finance and insurance, and health care and social assistance. Over the period, Kingston had no significant changes in the number of businesses operating within the industrial sector with the exception of the manufacturing sector, which saw a marginal decline.

Figure 4-4
City of Kingston
Change in Number of Businesses by Sector, 2007-2012



4.2 Industrial Lands Profile

4.2.1 Industrial Lands Overview

Industrial lands are an integral part of Kingston's economic development potential and accommodate a significant share of the municipality's businesses and employment. Kingston's urban industrial lands are organized into twelve delineated industrial/business park areas, as presented in Figure 4-5.

Kingston has 696 net Ha (1,720 net acres) of developed industrial land within its Urban Boundary with a large share in proximity to the Highway 401 corridor. Industrial lands within Kingston accommodate approximately 11.3 million sq.ft. of building G.F.A., which includes 8.5 million sq.ft. of industrial inventory space and 1.1 million sq.ft. of office building G.F.A.¹ The remaining 1.6 million sq.ft. is comprised of other commercial and institutional building G.F.A.

Industrial lands within Kingston accommodate a broad range of industrial uses, including manufacturing, distribution/logistics, construction and transportation, as well as commercial (including office) and institutional/recreational uses.

4.2.2 Official Plan Designations

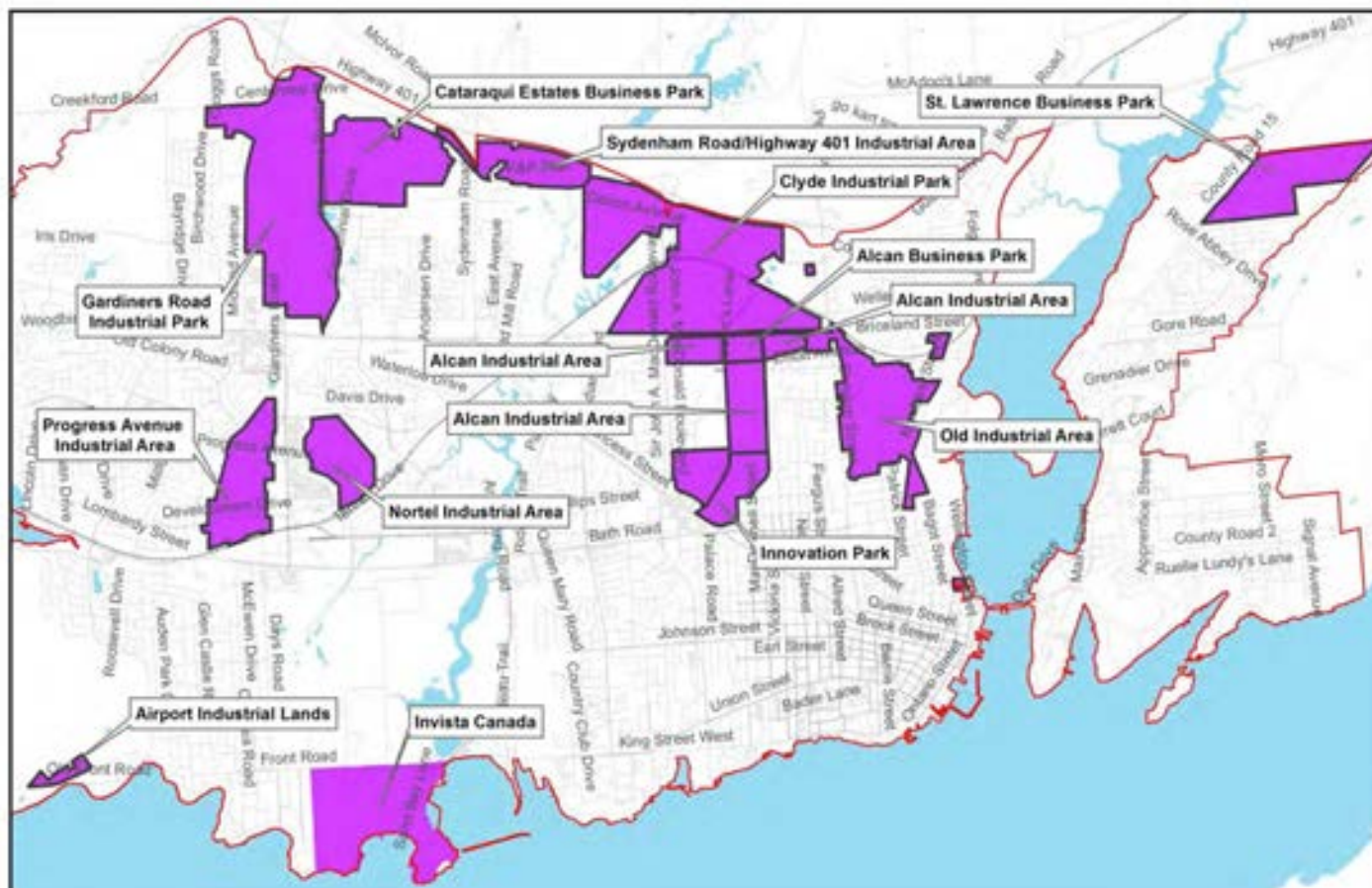
The existing approved Official Plan identifies three land use designations which fall under the general category of urban industrial lands (as defined herein), which include General Industrial, Business Park Industrial and Waste Management Industrial. The City also has a Rural Industrial designation for lands located outside the Urban Boundary.

The following provides a brief description of each designation:

Business Park Industrial: lands under this designation are intended to provide prominent locations for industrial and industrial-support uses in architecturally treated and finished buildings with a high quality landscaped setting that promotes a prestige corporate community. These areas promote prestige office, research and similar employment uses.

¹ Watson & Associates Economists Ltd. estimate.

Figure 4-5
Kingston's Key Urban Industrial Areas



General Industrial: lands under this designation are intended to provide convenient locations for industrial sector uses. The uses are grouped into distinct employment areas to foster growth and mitigate adverse effects on residential or sensitive neighbouring uses.

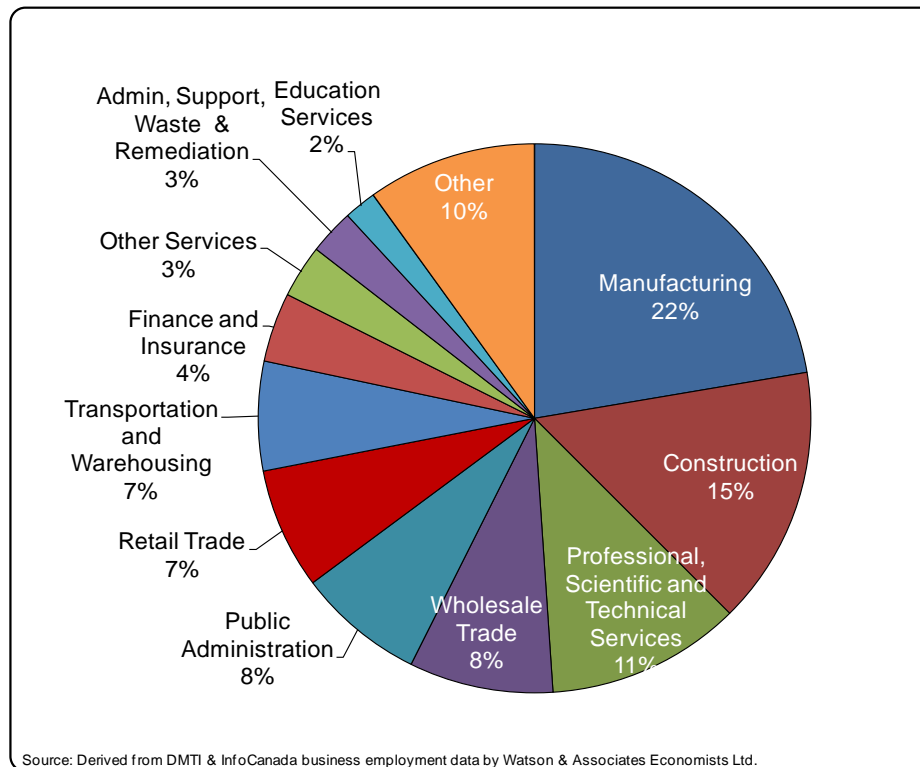
Waste Management Industrial: lands under this designation are intended to provide suitable locations and conditions that may involve intrusive levels of noise, odour, dust and other emissions and may have unsightly visual impacts.

Rural Industrial: lands under this designation are intended to recognize limited areas of industrial development that are generally of a larger scale that serves the local rural area or the agricultural community.

4.2.3 Urban Industrial Lands Employment Structure

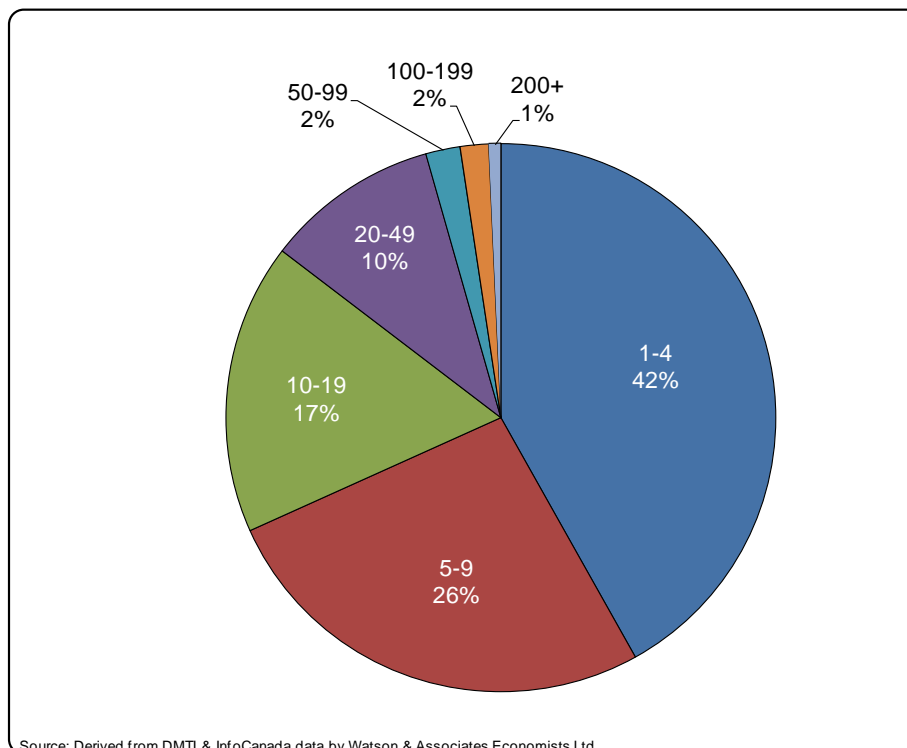
Kingston's existing developed and designated industrial lands in the urban area accommodate approximately 12,000 jobs, representing approximately 17% of the employment base. As illustrated in Figure 4-6, 22% of Kingston's employment on industrial lands is in the manufacturing sector, followed by 15% in construction, 11% in professional, scientific and technical services, 8% in wholesale trade, 8% in public administration, 7% in retail trade, and 7% in transportation and warehousing. The remaining employment is largely in other service-oriented sectors.

Figure 4-6
City of Kingston Employment on Industrial Lands, 2014



Kingston's industrial lands are home to approximately 900 businesses. Two-thirds of businesses located on industrial lands have less than 10 employees, as shown in Figure 4-7. This suggests that Kingston's industrial areas, while accommodating many of the municipality's larger employers, are also home to a wide range of smaller scale businesses.

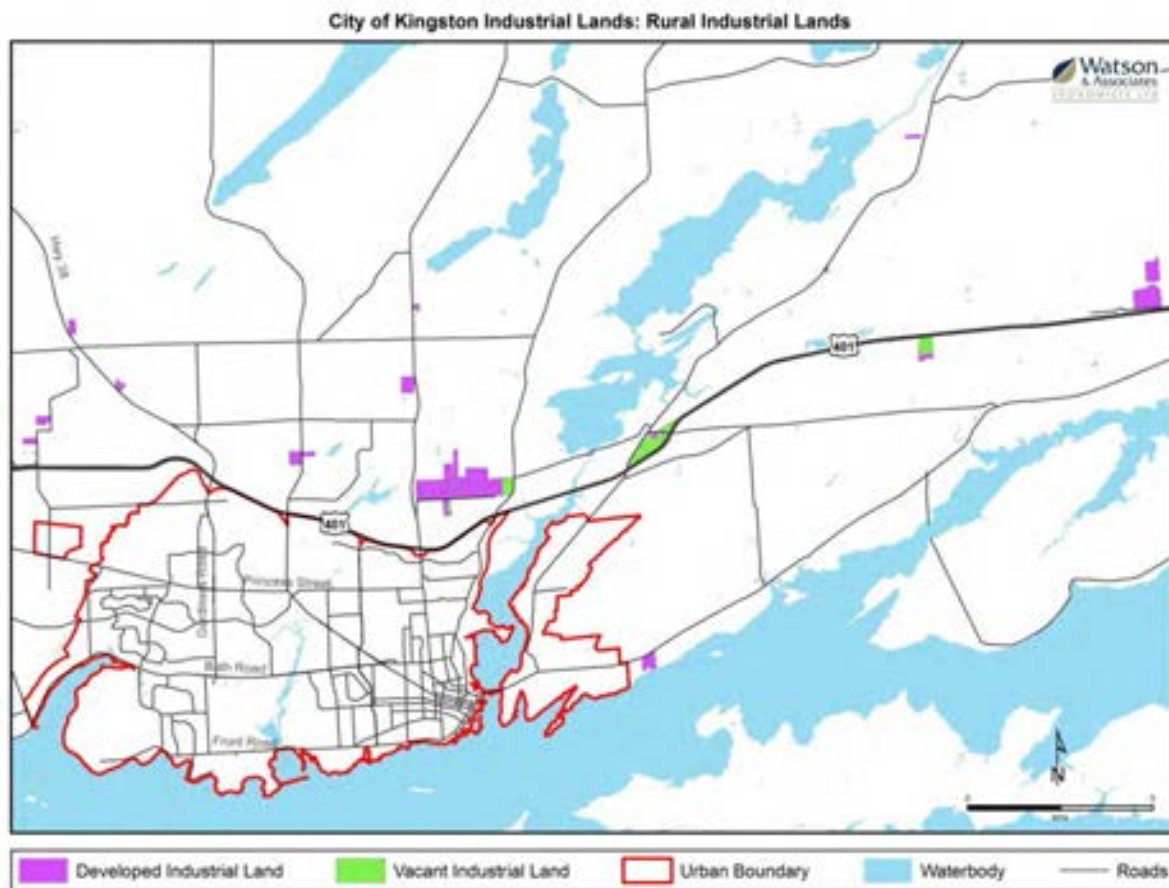
Figure 4-7
Share of Businesses on Industrial Lands by Number of Employees



4.2.4 Rural Industrial Lands

Kingston also has approximately 247 Ha (610 acres) of developed rural industrial lands located outside the Urban Boundary, as illustrated in Figure 4-8. This includes lands designated Rural Industrial and Waste Management Industrial in the City's O.P. The developed rural industrial lands are largely concentrated along McAdoo's Lane. The rural industrial lands accommodate general industrial type businesses, including salvage yards, landfill sites and contractor yards. Kingston has approximately 75 Ha (185 acres) of vacant land designated Rural Industrial. The rural industrial lands are privately serviced, which limits their utilization and the uses that can be accommodated. The majority of the vacant designated rural industrial lands are located on Highway 15 just north of Highway 401.

Figure 4-8



4.2.5 Overview of Kingston Industrial/Business Park Areas

The following provides an overview of Kingston's key industrial/business park areas.

4.2.5.1 Airport Industrial Lands

The Kingston Airport Industrial Lands are comprised of 7 net Ha (17 net acres) of undeveloped designated vacant industrial land. The lands are located south of the airport terminal, bound by Front Road to the south, Hampton Gray Gate to the east and Len Birchall Way to the north. A portion of the lands are being used temporarily as a golf driving range. The lands are designated Business Park Industrial and intended to be developed in support of airport economic activities and complementary uses. An additional 33 gross Ha (82 gross acres) of vacant land located at the northeast corner of the airport boundary abutting Bayridge Drive have been identified for potential industrial development over the longer term through the Kingston Norman Rogers Airport 2007 Master Plan, though the lands currently have an Airport land use designation. The Airport Master Plan has identified that they are potentially serviceable via the

neighbouring residential subdivision and could be developed for industrial uses pending market demand.

4.2.5.2 Alcan Industrial Area

The Alcan Industrial Area covers a large geographic area bounded by Princess Street to the south, Sir John A. Macdonald Boulevard to the west, Leroy Grant Drive to the east and John Counter Boulevard to the north. The industrial area is home to approximately 700 jobs. The industrial area covers a large portion of the former site of the Alcan Canada property and has three distinct sub-areas. The majority of the industrial area is home to Novelis, a large-scale metal products manufacturer. The southwest corner of the area is occupied by the former Alcan south building which is currently an underutilized property, known as the “J.S.M. property.” The northern portion along John Counter Boulevard is largely vacant except for a developed parcel at the southeast corner of John Counter Boulevard and Sir John A. Macdonald Boulevard. The majority of the lands, including the lands occupied by Novelis and the southwest portion are designated General Industrial, while the lands along John Counter Boulevard are designated Business Park Industrial.

4.2.5.3 Alcan Business Park

The Alcan Business Park is located next to the Alcan Industrial Area and is comprised of a small prestige employment area, home to 375 jobs largely in office commercial and government services. The Alcan Business Park has seen strong development activity and is approaching buildout with only two vacant parcels remaining. The Alcan Business Park is designated Business Park Industrial.

Alcan Business Park



4.2.5.4 Cataraqui Estates Business Park

The Cataraqui Estates Business Park is located immediately east of the Gardiners Road Industrial Area (east of Fortune Crescent) and is bounded by a major hydro easement to the south and Highway 401 to the north. The Cataraqui Estates Business Park is the City's newest business park and is highly prestige in character. The Cataraqui Estates Business Park has seen significant development activity over the past five years, accommodating a number of small- to medium-sized businesses within the manufacturing, transportation and utilities sectors. The park is largely unbuilt and offers significant opportunities to accommodate future growth. The lands are a mix of Business Park Industrial and General Industrial.

Cataraqui Estates Business Park



4.2.5.5 Clyde Industrial Park Area

The Clyde Industrial Park, formerly known as the New Industrial Park, is bounded by John Counter Boulevard in the south, Division Street to the east, Highway 401 to the north and Little Cataraqui Creek to the west. The area is bisected north/south by the C.N. rail line. The area has good access to Highway 401 via Sir John A. Macdonald Boulevard and Division Street. Lands on the northern periphery of the industrial area have excellent exposure to Highway 401. The area to the south of the rail line is an older area with a general industrial character comprised of utilities, general industrial buildings and salvage yards. The area to the north of the rail line, east of Sir John A. Macdonald Boulevard, has a general industrial character. The area to the west of Sir John A. Macdonald Boulevard north of the rail line is a newer industrial area which has a moderate prestige character.

The area is home to approximately 230 businesses with a total employment base of 2,800. The area is home to a broad range of sectors with a large concentration of businesses in construction, wholesale trade, transportation, manufacturing and

professional, scientific and technical services. Development of the area has a long history which began in the late 1960s and has continued to date. The park is approaching build out and has only two municipally owned vacant parcels remaining.

The majority of lands are designated General Industrial with the exception of lands fronting Sir John A. Macdonald Boulevard and Highway 401 which are designated Business Park Industrial.

Clyde Industrial Park



4.2.5.6 Gardiners Road Industrial Area

The Gardiners Road Industrial Area is one of the larger industrial areas in Kingston, with a developed land area of 122 net Ha (301 net acres). Located in the northwest quadrant of the urban area, the area is centered along the Gardiners Road corridor bounded by Princess Street to the south, Midland Avenue to the west, Highway 401 to the north and Centennial Drive to the east. The Gardiners Road Industrial Area is home to approximately 250 businesses and 2,800 jobs, accommodating a broad range of sectors, including manufacturing, wholesale trade, transportation, construction and business and professional services.

The Gardiners Road Industrial Area was developed as a municipally owned industrial park beginning in the late 1970s (known then as Cataraqui Industrial Estates) and consists of a mix of older general industrial uses located in the southern part and newer more prestige uses to the north. The area to the south is more concentrated with commercial uses, while the area to the north is more industrial in nature. The Gardiners Road Industrial Area is largely built out, though a few larger vacant parcels remain along Midland Avenue.

The lands are a mix of General Industrial and Business Park designation.

Gardiners Road Industrial Area



4.2.5.7 Innovation Park

The area to the southeast of the Alcan Industrial Area along the north side of Princess Street is home to Innovation Park, a research and development park established by Queen's University in 2008 and now operated by Jag Property Management. The park encompasses 220,000 sq.ft. of office space within the former Novelis Research and Development Centre, accommodating a range of business types ranging from incubator type "start-up" businesses to medium-sized firms. The park is home to approximately 50 small- to medium-sized companies and organizations largely oriented to research and development, academic and government organizations, professional, scientific and technical services and health and social services. The park is home to the Grafoid Global Development Centre. Major tenants include CMC Microsystems, Green Centre Canada and various Queen's University department units. The park has been highly successful at attracting tenants and is largely leased out. The park has approximately 20 Ha (50 acres) of vacant designated industrial land available for future development.

Innovation Park



4.2.5.8 Nortel Industrial Area

The Nortel Industrial Area is the site of the former Nortel manufacturing plant. The lands are privately owned and the owner is proposing to convert the site to a mixed commercial and residential use. The area is bound by Taylor-Kidd Boulevard to the

north, RioCan retail power centre to the west, the C.N. rail line to the south and a residential area to the east. The area includes 25 Ha (62 acres) of developed land and 16 Ha (40 acres) to the south which is vacant. The developed component of the site is underutilized and the majority of the building has been recently demolished. The lands are designated General Industrial.

4.2.5.9 Old Industrial Area

The Old Industrial Area represents Kingston's oldest and most mature industrial area. Located in the central part of Kingston, the Old Industrial Area is bounded by Division Street to the west, John Counter Boulevard to the north, Montreal Street to the east and Russell Street to the south. Containing 64 net Ha (158 net acres) of developed industrial lands, the Old Industrial Area has a general industrial character and is home to a range of sectors, including manufacturing, construction, wholesale trade and public administration, accommodating approximately 120 businesses and 1,700 jobs. Major private sector employers include Coca Cola Bottling and Weston Bakeries. The area has seen limited development over the past decade, though a number of sites along Division Street have been developed for government uses (i.e. Frontenac County Children's Aid Society, the City of Kingston Police Headquarters and the City of Kingston Public Works Administration Building).

The Old Industrial Area has a handful of larger vacant and derelict parcels that offer development/redevelopment potential, largely located along the Montreal Street Corridor and within the former C.N. rail yard lands. Industrial lands within the Old Industrial Area are designated General Industrial. The Old Industrial Area covers a large portion of the City's Community Improvement Plan – Brownfield Project Area.

Old Industrial Area



4.2.5.10 Progress Avenue Industrial Area

The Progress Avenue Industrial Area is bounded by Gardiners Road to the east, the C.N. rail line to the south and the west branch of the Little Cataraqui Creek to the west and north. The area contains 78 net Ha (193 net acres) of developed industrial land and is largely built out. Home to approximately 250 business and 1,600 jobs, the Progress Avenue Industrial Area accommodates a range of sectors including construction, manufacturing, wholesale trade and business and professional services. The area south of Progress Avenue is an older area with development dating back to the mid-1960s and has a general industrial character. The area to the north of Progress Avenue is newer, has a more prestige character and accommodates largely commercial and office commercial uses. The majority of lands are designated General Industrial with the exception of lands north of Arlington Park Place which are designated Business Park Industrial.

Progress Avenue Industrial Area



4.2.5.11 St. Lawrence Business Park Area

Established in the early 1990's, the St. Lawrence Business Park is one of the City's newer industrial parks. Over the past decade, the park has seen significant development activity largely in distribution/logistics, professional, scientific and technical services and other commercial uses. Located on Highway 15, south of Highway 401, the park is home to approximately 1,000 jobs. The St. Lawrence Business Park has 23 net Ha (57 net acres) of City-owned vacant lands remaining. Lands within the St. Lawrence Business Park are designated Business Park Industrial. The City has recently acquired lands to the north of the existing park to accommodate future expansion of the park.

St. Lawrence Business Park



4.2.5.12 Sydenham Road/Highway 401 Industrial Area

The Sydenham Road/Highway 401 Industrial Area is a largely undeveloped industrial area located to the south-east of Highway 401 and Sydenham Road containing 22 gross Ha (54 gross acres) of vacant unserviced designated industrial land. In accordance with the City's O.P., development of the area requires a Secondary Plan.

4.2.6 Industrial Lands Employment Density and Building F.S.I.

Based on the identified employment on industrial lands and the developed land area of Kingston's industrial lands, the city-wide average employment density (on designated industrial lands) is 18 jobs per net Ha (7 jobs per net acre), as presented in Figure 4-9. The highest employment densities are typically found in manufacturing and business services, while wholesale trade and transportation/warehousing tend to have lower employment densities.

Employment density varies widely by industrial area. Employment densities are relatively high in the City's industrial parks including the Cataraqui Estates Business Park (34 jobs per net Ha or 14 jobs per net acre) and 26 jobs per net Ha (11 jobs per net acre) in the St. Lawrence Business Park. Office commercial uses in newer business parks such as the Alcan Business Park and Innovation Park yield higher densities of employment compared to older, more traditional industrial areas. The Alcan Business Park and Innovation Park have an employment density of 36 jobs per net Ha (15 jobs per net acre) and 42 jobs per net Ha (17 jobs per net acre), respectively.

Average building F.S.I.¹ on industrial lands within Kingston is 15%, as shown in Figure 4-9. The F.S.I. is highest in Innovation Park Industrial Area, Progress Industrial Area, the Gardiners Road Industrial Area, Cataraqui Estates Business Park and the Old Industrial Area where it ranges between 19% and 28%. The F.S.I. is considerably lower

¹ F.S.I. (Floor Space Index) calculated by building G.F.A./net parcel size.

in the St. Lawrence Business Park, the Clyde Industrial Area and the Alcan Industrial Area where it ranges between 13% and 15%.

Figure 4-9

City of Kingston Industrial Lands Employment Density and F.S.I.

Industrial Area	Employment Density (Jobs/net Ha)	F.S.I.
Alcan Business Park	36	18%
Alcan Industrial Area	11	13%
Cataraqui Estates Business Park	34	20%
Clyde Industrial Area	15	14%
Gardiners Road Industrial Area	23	20%
Innovation Park	42	28%
Old Industrial Area	26	19%
Progress Industrial Area	31	24%
St. Lawrence Business Park	26	15%
City of Kingston Average	18	15%

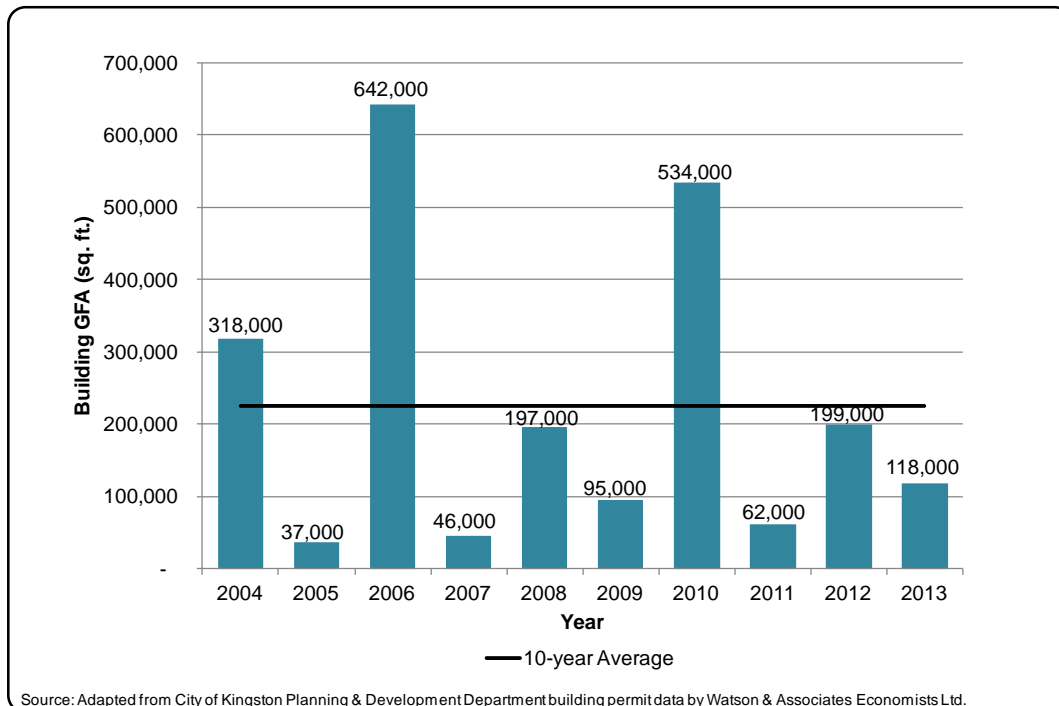
Source: Watson & Associates Economists Ltd.

4.2.7 Trends in Development Activity on Industrial Lands

4.2.7.1 Recent Development on Industrial Lands

Figure 4-10 summarizes building construction (new and expansions) within Kingston's industrial lands over the 2004-2013 period, expressed in G.F.A. (Gross Floor Area). As illustrated, Kingston has averaged 225,000 sq.ft. of building activity on industrial lands annually over the past decade. Since 2010, development activity has remained below the ten-year historical average. New building construction has accounted for 97% of total development activity on industrial lands over the period, compared to 3% for expansions.

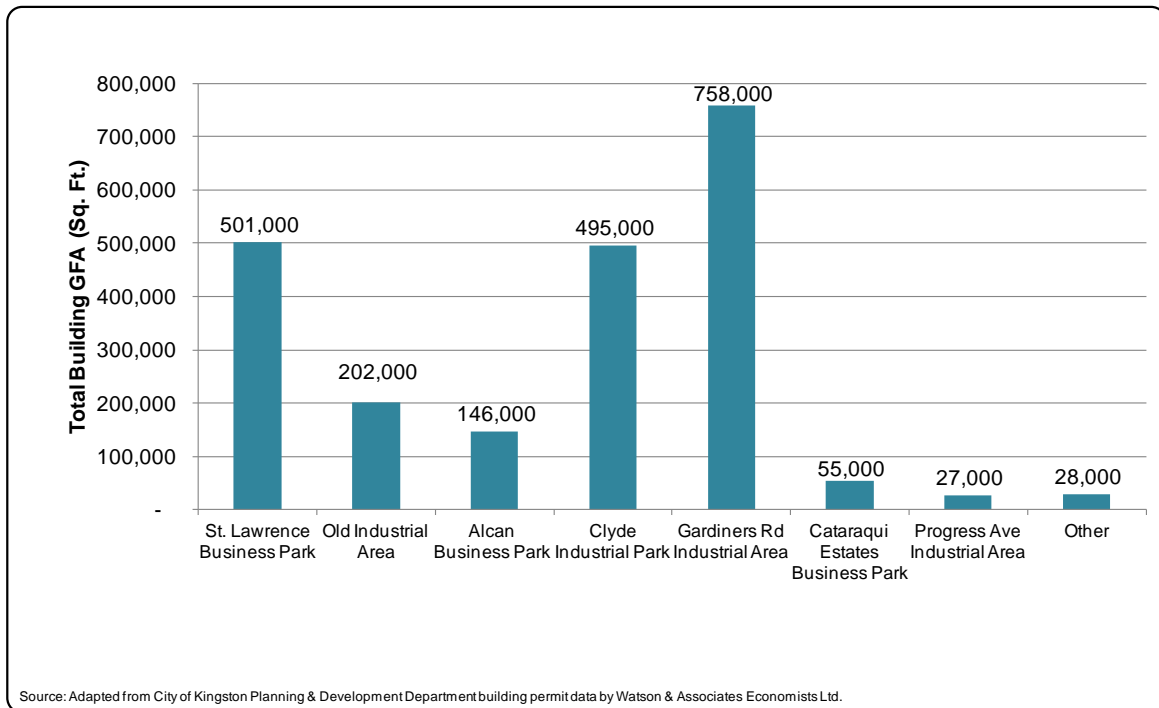
Figure 4-10
City of Kingston Annual Development Activity (New and Expansions) on Industrial
Lands, 2004-2013



Over the past decade, the majority of new development has been accommodated in the Cataraqui Estates Business Park, St. Lawrence Business Park and Clyde Industrial Park, as illustrated in Figure 4-11.

Figure 4-11

City of Kingston Development Activity on Industrial Lands by Industrial Area, 2004-2013



An increasing share of development activity on industrial lands is in non-industrial sectors. As illustrated in Figure 4-12, over the 2005-2008 period, 69% of development on industrial lands was within the industrial sector (compared to 14% and 17%, respectively, in the commercial and institutional sector). Over the 2009-2013 period, the share of development within the industrial sector decreased to 35% with the commercial and institutional sectors accounting for 49% and 16% of G.F.A., respectively.

Figure 4-12
 City of Kingston Development Activity on Industrial Lands by Major Sector

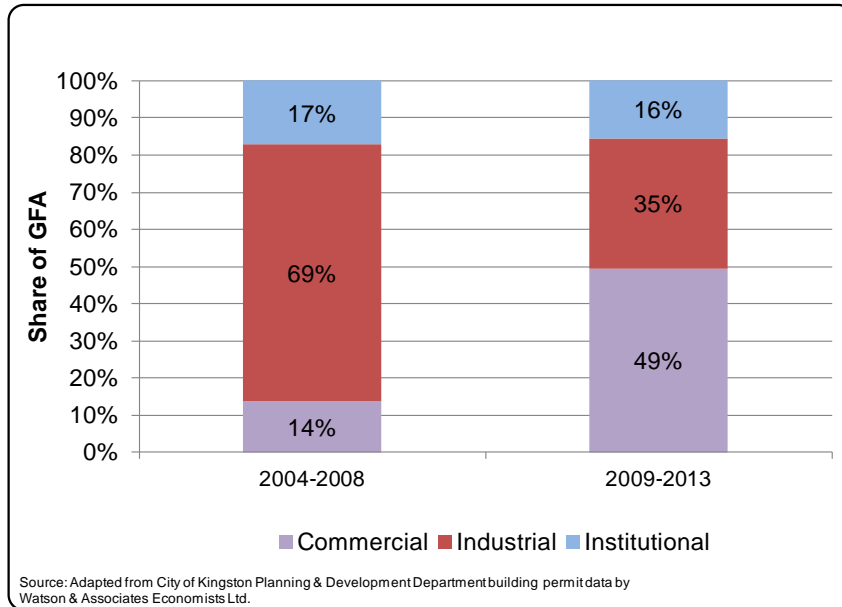


Figure 4-13 summarizes new industrial G.F.A. by sector in Kingston over the 2006-2013 period. As shown, 40% of new development has been in transportation/warehousing followed by 17% in professional, scientific and technical services.

Figure 4-13
 City of Kingston New G.F.A. on Industrial Lands by Sector, 2006-2013

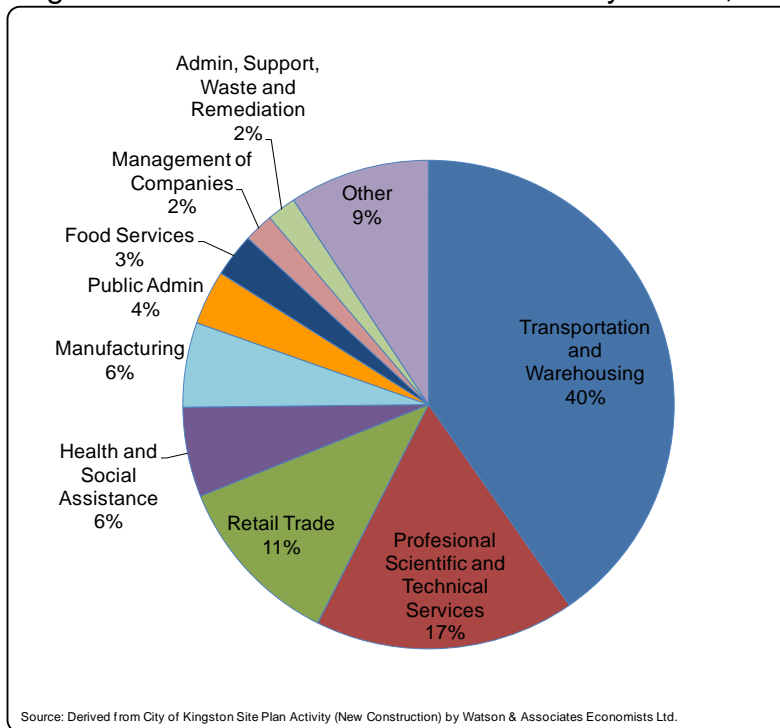
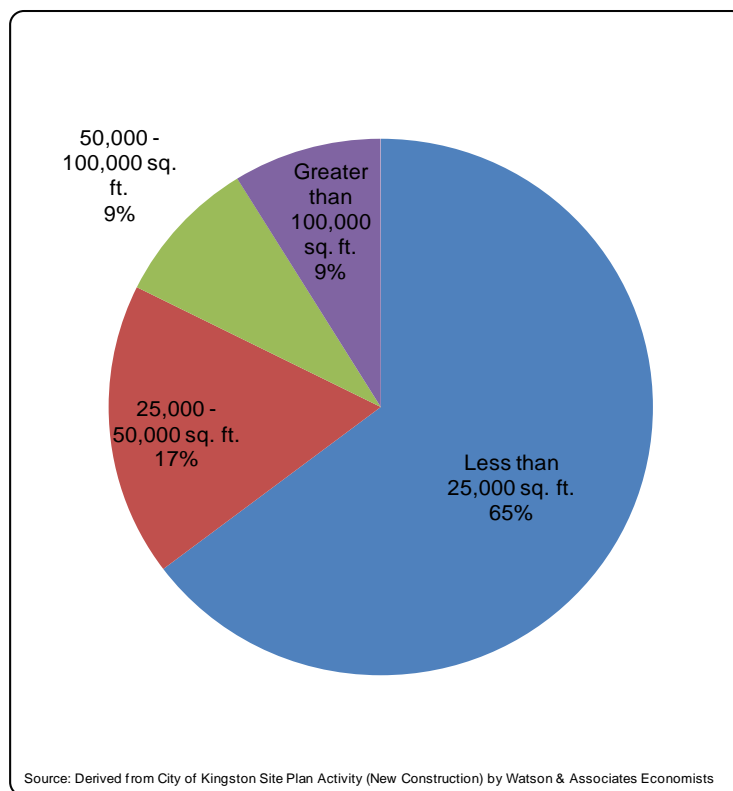


Figure 4-14 summarizes the industrial buildings developed by size between 2006 and 2013. As illustrated, 65% of developments have comprised buildings less than 25,000 sq.ft. G.F.A., while 17% have been between 25,000 and 50,000 sq.ft., 9% have been between 50,000 and 100,000 sq.ft. and 9% have been 100,000 sq.ft. or greater.

Figure 4-14
City of Kingston
New Development on Industrial Lands by Building Size, 2006-2013



4.2.7.2 Industrial Lands Absorption

Figure 4-15 summarizes annual absorption of industrial lands within Kingston over the past decade (i.e. 2004-2013). As illustrated, over the period, industrial land absorption levels have averaged approximately 12 net Ha (30 net acres) per year. Annual industrial lands absorption has fluctuated widely by year.

The majority of land absorption over the past decade has been in the St. Lawrence Business Park, the Gardiners Road Industrial Area and the Clyde Industrial Park, as illustrated in Figure 4-16. Approximately 57% of industrial lands absorbed over the past decade have been prestige industrial lands (i.e. Business Park Industrial designated lands).

Figure 4-15
City of Kingston
Annual Industrial Lands Absorption (Net Ha), 2004-2013

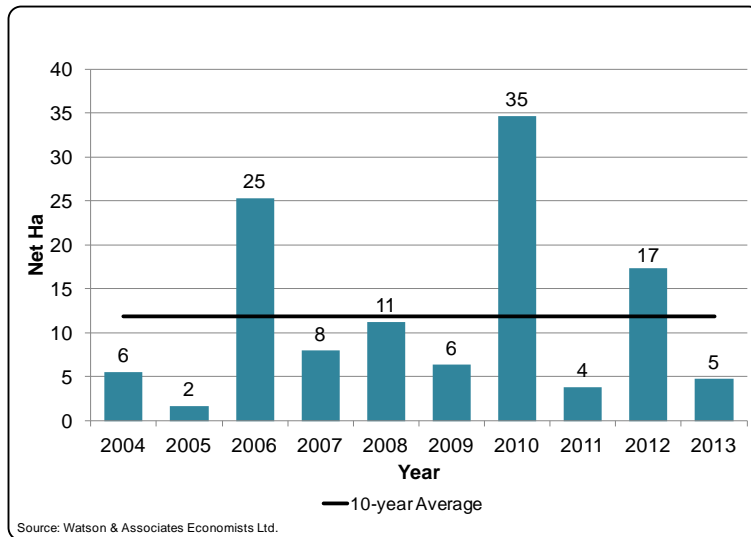
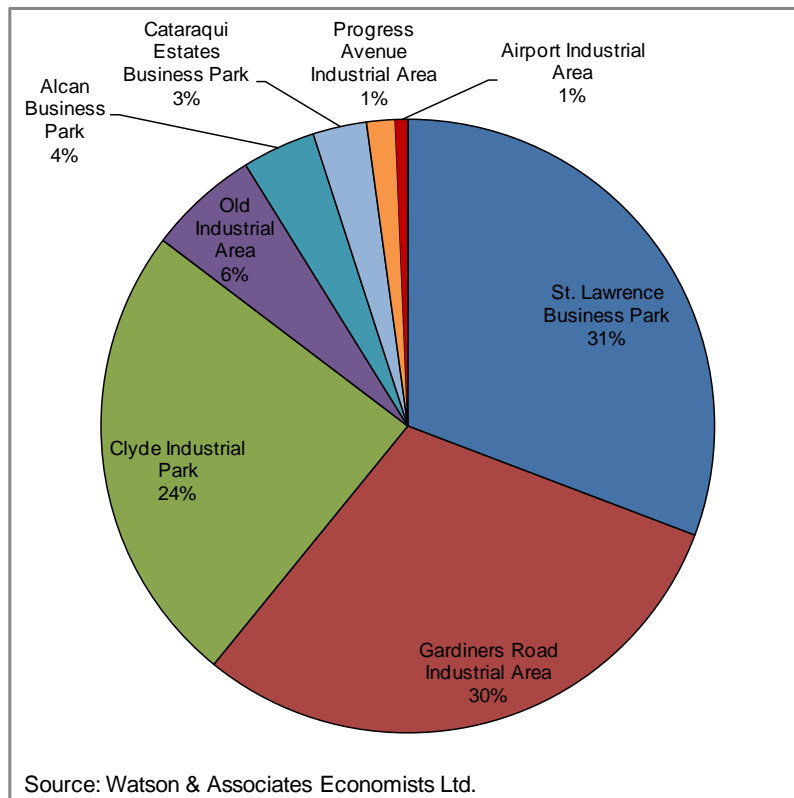


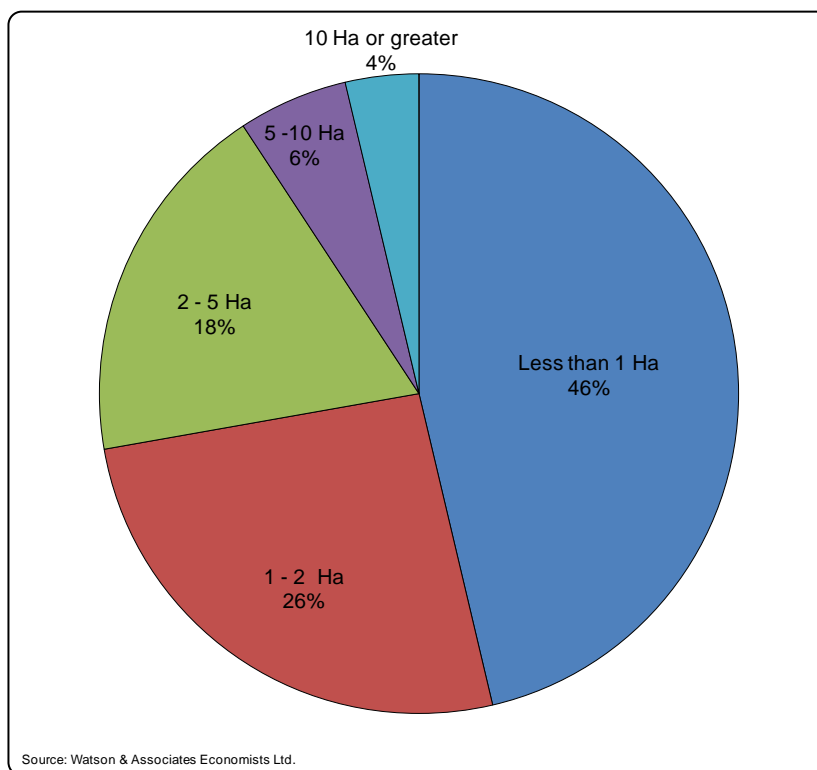
Figure 4-16
City of Kingston
Absorbed Industrial Lands by Industrial Area, 2004-2013



Industrial land absorption over the 2004-2013 period was comprised of a broad range of parcel sizes. Approximately one-half (46%) of the land absorbed over the period

consisted of parcels less than 1 net Ha (2.5 net acres) in size, as summarized in Figure 4-17. Meanwhile, parcels 1 to 2 net Ha (2.5 to 5 net acres) accounted for 26% of the total. Larger parcels (greater than 5 net Ha) accounted for 10% of absorbed parcels.

Figure 4-17
City of Kingston
Industrial Lands Absorbed by Parcel Size, 2004-2013



4.2.7.3 Employment Density and Building F.S.I.

The average employment density on industrial lands absorbed between 2006 and 2013 is 18 jobs per net Ha (7 jobs per net acre), as shown in Figure 4-18, comparable to the existing city-wide average. Meanwhile, building F.S.I. of recent development is comparable to the existing city-wide average of 15%. Density and F.S.I. are highest on commercial developments and moderately lower for industrial and institutional developments.

Figure 4-18
City of Kingston
Employment Density and F.S.I. of Recent Development Activity
on Industrial Lands, 2006-2013 by Major Sector

Sector	Employment Density (Jobs/net Ha)	F.S.I.
Industrial	14	15%
Commercial	28	13%
Institutional	17	18%
Average	18	15%

Source: FSI derived from 2004-2013 site plan activity data by Watson & Associates Economists Ltd. Employment Density based on a sample of site plans associated employment data

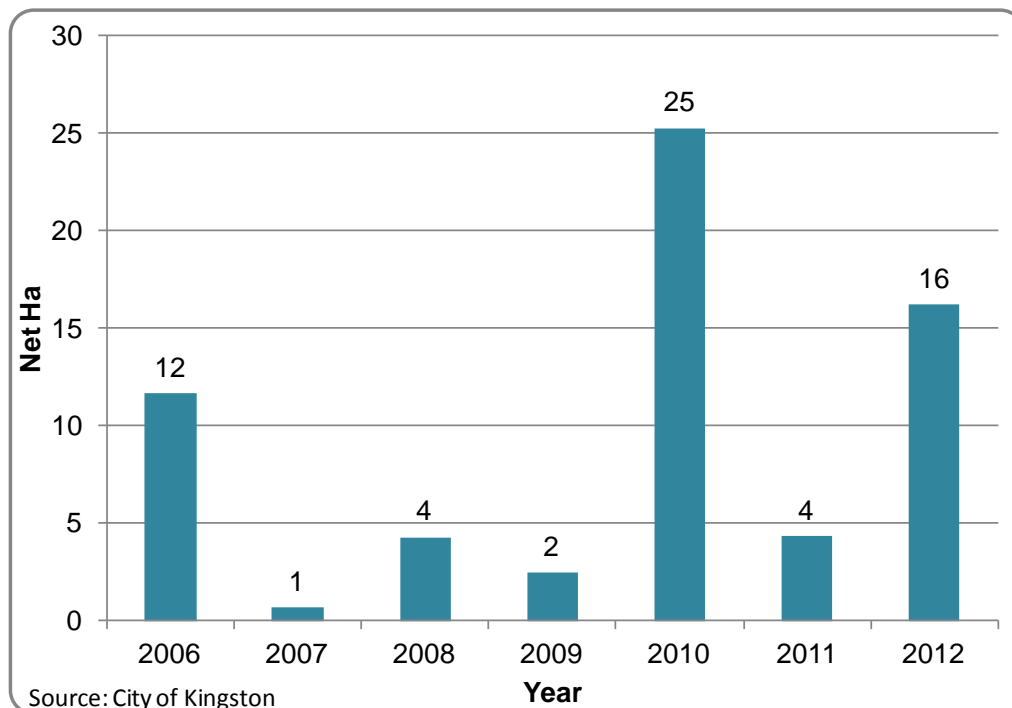
4.2.8 City of Kingston Industrial Land Sales

The City is a key industrial land developer in Kingston, assembling and servicing land. The City is responsible for subdivision design, infrastructure development and land sales. The City guides development through subdivision phasing and sells land parcels to private developers and individuals as demand warrants. The Kingston Economic Development Corporation (K.E.D.C.O.) is responsible for marketing the industrial land.

The City's land development activity accounts for a substantial portion of total industrial land absorption. The remainder is from concurrent development of privately owned lands.

Figure 4-19 illustrates the City's industrial land sales between 2006 and 2012. Over the period, land sales have averaged 9 net Ha (22 net acres) per year, representing approximately 61% of total industrial lands absorbed in Kingston.

Figure 4-19
 City of Kingston
 Industrial Lands Sales (Net Ha), 2006-2012



Industrial Land Prices

The price for City-owned industrial land ranges between \$65,000 and \$130,000 per acre, as shown in Figure 4-20. Land prices are negotiable but are higher if used for commercial purposes.

Figure 4-20
 City-owned Vacant Industrial Land Prices

	City-owned Price per Acre ¹
Cataraqui Estates Business Park	\$130,000
Clyde Industrial Park	\$65,000
Alcan Business Park	\$90,000
Gardiners Road Industrial Area	-
St. Lawrence Business Park	\$85,000 - \$110,000

Source: Watson & Associates Economists Ltd.

1. Price reflects lands are to be used for industrial purposes. Lands used for commercial uses would be subject to a higher price.

4.2.9 Vacant Industrial Floor Space

Kingston currently has 634,000 sq.ft. of vacant industrial floor space, representing an industrial vacancy rate in Kingston of 8.1%.¹ Industrial vacancy has risen moderately since 2011 when it averaged 5%.² Kingston's industrial vacancy rate of 8.1% indicates that there is some underutilized building capacity in the industrial market but this is not uniform across the municipality.

Figure 4-21 illustrates average industrial vacancy rates in select industrial areas within Kingston where market data was available. As shown, vacancy rates are relatively low (i.e. less than 3%) in the City's two business parks - Cataraqui Estates Business Park and St. Lawrence Business Park. Vacancy rates are moderately lower than the city-wide average in two of Kingston's older more mature general industrial areas, Progress Avenue Industrial Area and Old Industrial Area, where vacancy rates average 6.1% and 6.2%, respectively. In contrast, industrial vacancy rates in Kingston's two largest industrial areas, Clyde Industrial Area and Gardiners Road Industrial Area, are moderately higher, averaging 8.0% and 9.3%, respectively.

Figure 4-21
City of Kingston
Average Industrial Vacancy Rates by Industrial Area

	Industrial Building GFA (sq. ft.)	Vacant GFA (sq. ft.)	Vacancy Rate (%)
Clyde Industrial Park	2,030,300	161,900	8.0%
Gardiners Road Industrial Area	1,834,700	169,800	9.3%
Cataraqui Estates Business Park	74,100	-	0.0%
Old Industrial Area	990,100	61,000	6.2%
Progress Avenue Industrial Area	1,188,900	72,400	6.1%
St. Lawrence Business Park	350,600	8,600	2.5%

Source: Watson & Associates Economists Ltd.

The industrial vacancy rate is expected to decline moderately over the medium term as macro economic conditions improve and Kingston's industrial market strengthens. While the uptake of vacant industrial space is not expected to have a significant impact on industrial land needs, it has been factored in to the intensification component of the industrial land needs analysis, as presented in Chapter 6.

¹ DTZ Ltd., May 2014.

² Kingston Market View, Rogers and Trainor, January 2012.

4.3 Observations

Kingston has a strong, dynamic and diverse industrial lands base, covering an area of 696 developed net Ha (1,720 net acres) and accommodating 17% of the employment base. Kingston's industrial lands base is dominated by manufacturing, transportation/warehousing and a range of commercial and institutional uses. Over the past decade, Kingston has experienced volatility in development activity on industrial lands. The majority of growth over the past decade has been driven by transportation/warehousing and the commercial sector, with development concentrated in the professional, scientific and technical services and retail trade sectors. In contrast, Kingston has seen limited development in other industrial sectors.

5. City of Kingston Urban Industrial Land Supply

A major factor in the future competitiveness of Kingston's economic base is the supply and quality of its vacant industrial lands. This section provides a comprehensive assessment of Kingston's vacant urban industrial land supply.

5.1 Vacant Urban Industrial Lands Analysis

Working with a preliminary inventory of vacant industrial land data provided by the City, the Consultant Team reviewed all industrially designated parcels within the urban area. The analysis was completed primarily through a desktop review using Geographic Information System (G.I.S.) mapping software. Spatial overlays utilized included parcel fabric, official plan and zoning overlays, hydrology, environmental constraints and 2013 orthophotos. Further, a windshield survey of the industrial areas was completed to refine the analysis.

Figure 5-1 summarizes the total gross and net vacant industrial land supply for Kingston (as of mid-2014) by industrial area. As illustrated, Kingston has a total of 291 gross Ha (719 gross acres) of vacant designated industrial land. The gross land area reflects reductions for environmental features identified as Environmental Protection Area in the City's Official Plan and Zoning By-law.

In determining the industrial land inventory, larger vacant parcels (i.e. 4 Ha or greater) which are not subdivided were also subject to an additional downward adjustment to reflect internal infrastructure (i.e. roads, stormwater ponds, easements, etc.) with a net to gross adjustment of 80%. In accordance with the aforementioned adjustments for internal infrastructure, Kingston's industrial land supply is estimated at 257 net Ha (635 net acres). Approximately 44% (113 net Ha) of the vacant land supply is located within the Gardiners Road Industrial Area and neighbouring Cataraqui Estates Business Park.

Figure 5-1
City of Kingston
Gross vs. Net Supply of Industrial Lands (Ha), 2014

Industrial Area	Total Gross Vacant ¹ (A)	Adjustment for Roads and Other Internal Infrastructure (B) ²	Net Vacant Employment Land Supply (C = A-B)
Airport Industrial Lands	7	0	7
Alcan Business Park	2	0	2
Alcan Industrial Area	20	4	16
Cataraqui Estates Business Park	85	12	73
Clyde Industrial Park	25	2	23
Gardiners Road Industrial Area	42	2	40
Innovation Park	19	4	16
Nortel Industrial Area	16	3	13
Old Industrial Area	23	4	19
Progress Industrial Area	7	0	7
St. Lawrence Business Park	23	0	23
Sydenham Road/Highway 401 Industrial Area	22	4	18
Other ³	2	0	2
Total	291	34	257

Source: Watson & Associates Economists Ltd.

Note: numbers may not add due to rounding

1. Reflects environmental takeouts.

2. A downward adjustment of 20% of the gross area has been applied to account for internal infrastructure on unsubdivided parcels typically greater than 4 hectares (10 acres) in size. Takeout also reflects Trans-Northern pipeline easement.

3. Reflects vacant industrial land parcels located at 495 Taylor-Kidd Boulevard

Long-term land vacancy (i.e. vacant industrial parcels) is a common characteristic which is experienced in mature industrial parks throughout Ontario, including Kingston.

Typically, as industrial/business park lands are brought to market, the more marketable and developable industrial sites absorb first. Often the remaining less-marketable sites are fragmented throughout the industrial park, which limits their potential for larger scale development. Invariably, many of these sites remain vacant over the longer term, due

to their limited market choice to end users. While these observations largely apply to Kingston's more mature industrial areas, over time it is foreseeable that newer industrial areas will also begin to exhibit these characteristics. Accordingly, additional reductions to the net developable vacant industrial land supply have been made to account for long-term land vacancy, as summarized in Figure 5-2. This adjustment accounts for sites which are unlikely to develop over the long term due to odd/small lot sizes and poor configuration, unfavourable site conditions (e.g. low lying areas prone to flooding), underutilized employment sites and site inactivity/land banking, which may tie up potentially vacant and developable lands.

For the purpose of this analysis, an estimate of approximately 5% long-term land vacancy has been used, i.e. total net developed (A) + total net vacant land area (B) X 5%. Adjusted for land vacancy, Kingston's net developable vacant designated industrial land supply is 215 net Ha (531 net acres).

Figure 5-2
City of Kingston

Net Supply of Vacant Industrial Lands Adjusted for Long Term Vacancy, 2014

Industrial Area	Developed Industrial Lands (A)	Net Vacant Industrial Land Supply (B)	Long-term Land Vacancy Adjustment ¹ (C)	Total Net Industrial Land Supply Adjusted for Land Vacancy (D = B-C)
Airport Industrial Lands	0	7	0	7
Alcan Business Park	8	2	0	1
Alcan Industrial Area	62	16	4	12
Cataraqui Estates Business Park	3	73	4	69
Clyde Industrial Park	173	23	10	13
Gardiners Road Industrial Area	122	40	8	32
Innovation Park	8	16	1	14
Nortel Industrial Area	25	13	2	11
Old Industrial Area	66	19	4	15
Progress Industrial Area	53	7	3	4
St. Lawrence Business Park	41	23	3	20
Sydenham Road/Highway 401 Industrial Area	11	18	1	17
Other ²	0	2	0	2
Total	572	257	41	215

Source: Watson & Associates Economists Ltd.

Note: Numbers may not add due to rounding

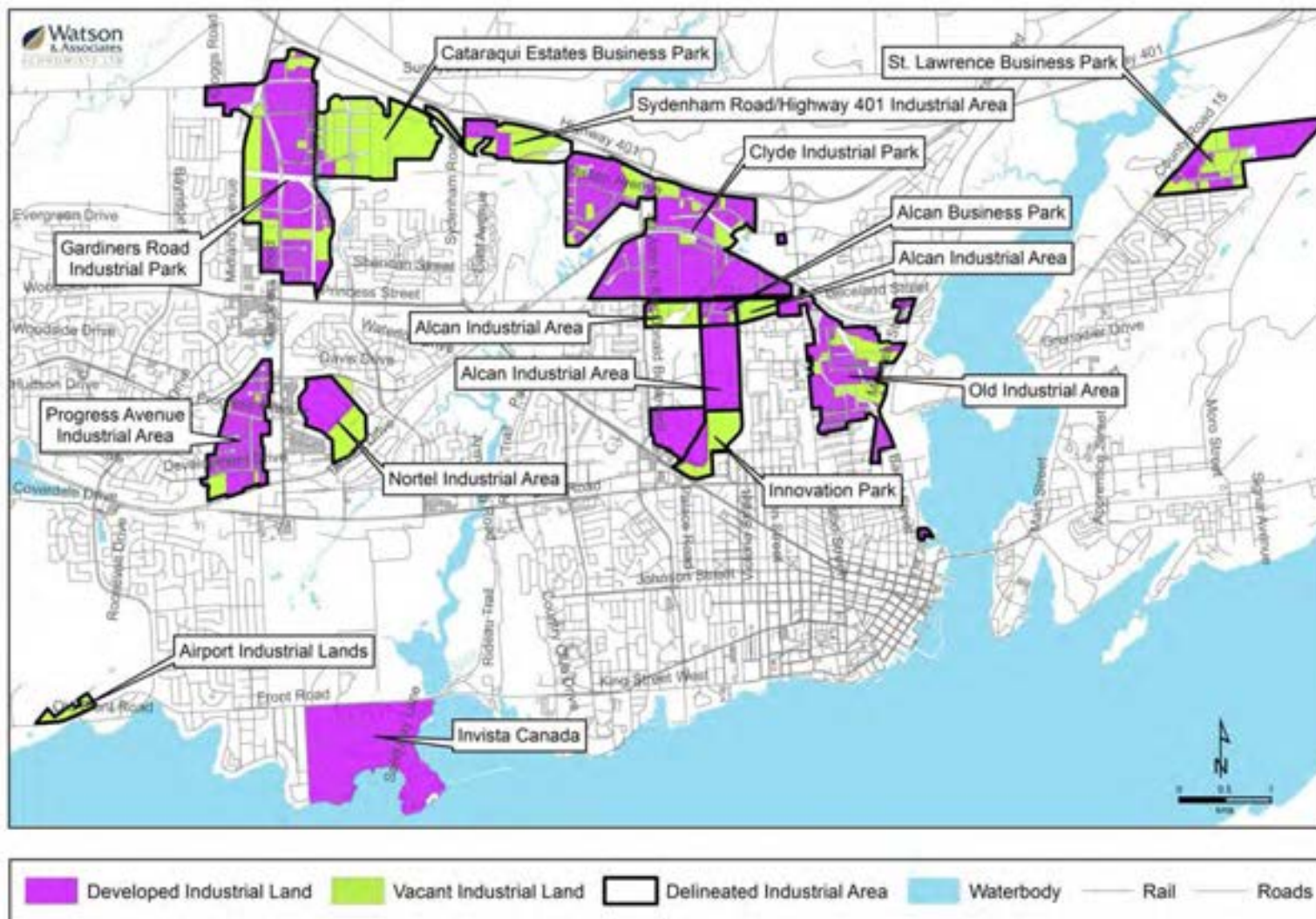
1. Long-term industrial land vacancy adjustment - 5% of net developed and net vacant industrial lands. Accounts for industrial land sites which may not develop over the long-term (i.e. 2034) due to odd/small lot size and poor configuration, underutilized employment sites, and sites inactive/land banking.

2. Reflects vacant industrial land parcels located at 495 Taylor-Kidd Boulevard

Figure 5-3 illustrates the geographic location of Kingston's vacant and developed industrial lands. More detailed mapping on the vacant and developed industrial lands by industrial area is provided in Appendix C.

Figure 5-3

City of Kingston Industrial Lands - Vacant and Developed Land within the Urban Area



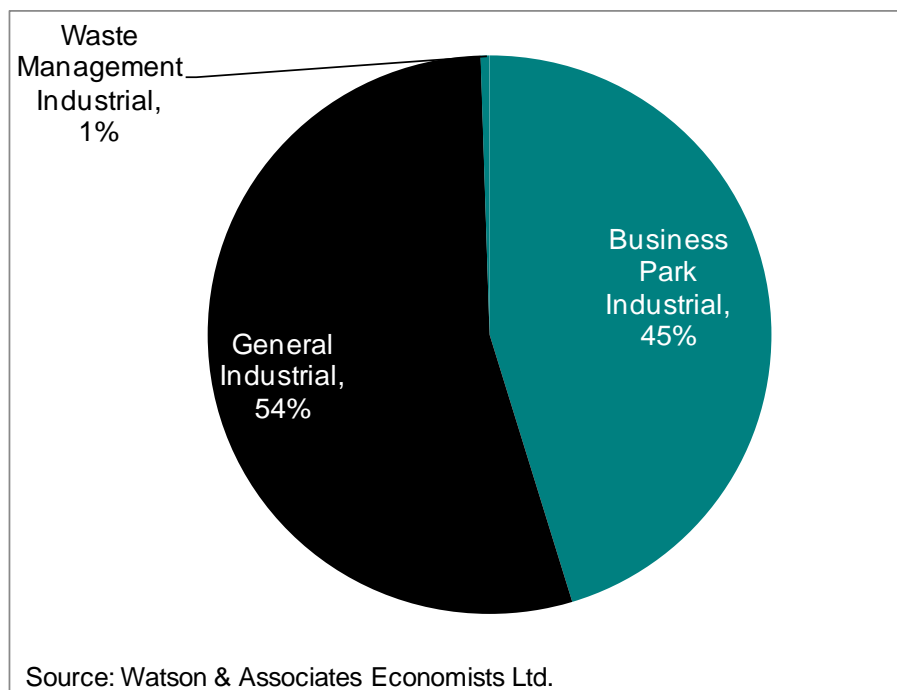
5.2 Vacant Industrial Land Characteristics

The following provides further details on Kingston's designated industrial lands and the availability of shovel-ready lands.

5.2.1 Industrial Lands Designation

Figure 5-4 summarizes Kingston's total designated industrial land supply by O.P. designation, as of mid-2014. As shown, 54% (139 net Ha) of Kingston's vacant industrial land is designated General Industrial Area, 45% (117 net Ha) is designated Business Park Industrial and 1% (1 net Ha) is Waste Management Industrial.

Figure 5-4
City of Kingston
Supply of Industrial Lands by Official Plan Designation



Land Ownership

Figure 5-5 summarizes Kingston's total designated industrial land supply by ownership. As shown, 80 net hectares (31%) is owned by the City. The majority of the City-owned lands are located in the St. Lawrence Business Park and the Cataraqui Estates Business Park, as illustrated on Figure 5-6. The remaining 178 net hectares (69%) is privately owned land located throughout Kingston.

The City-owned industrial land supply is limited. Based on forecast absorption as discussed in Section 6, and the City’s historical share of land absorption as highlighted in Chapter 4, the City has approximately 12 years of inventory supply remaining.

Figure 5-5
 City of Kingston
 Supply of Industrial Lands by Ownership

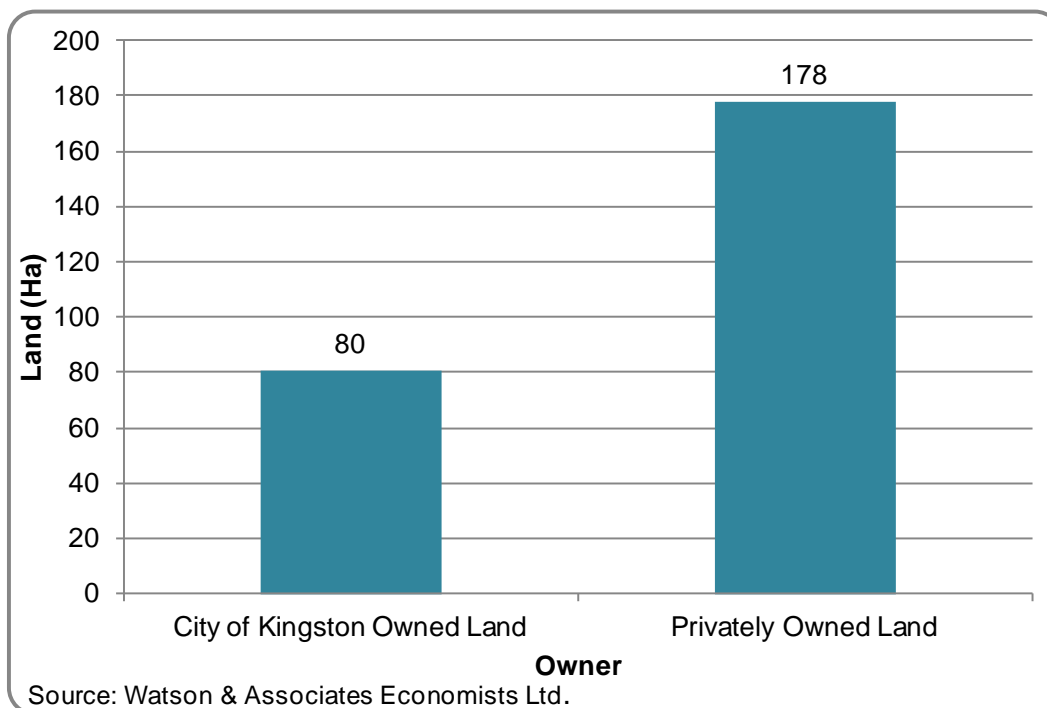
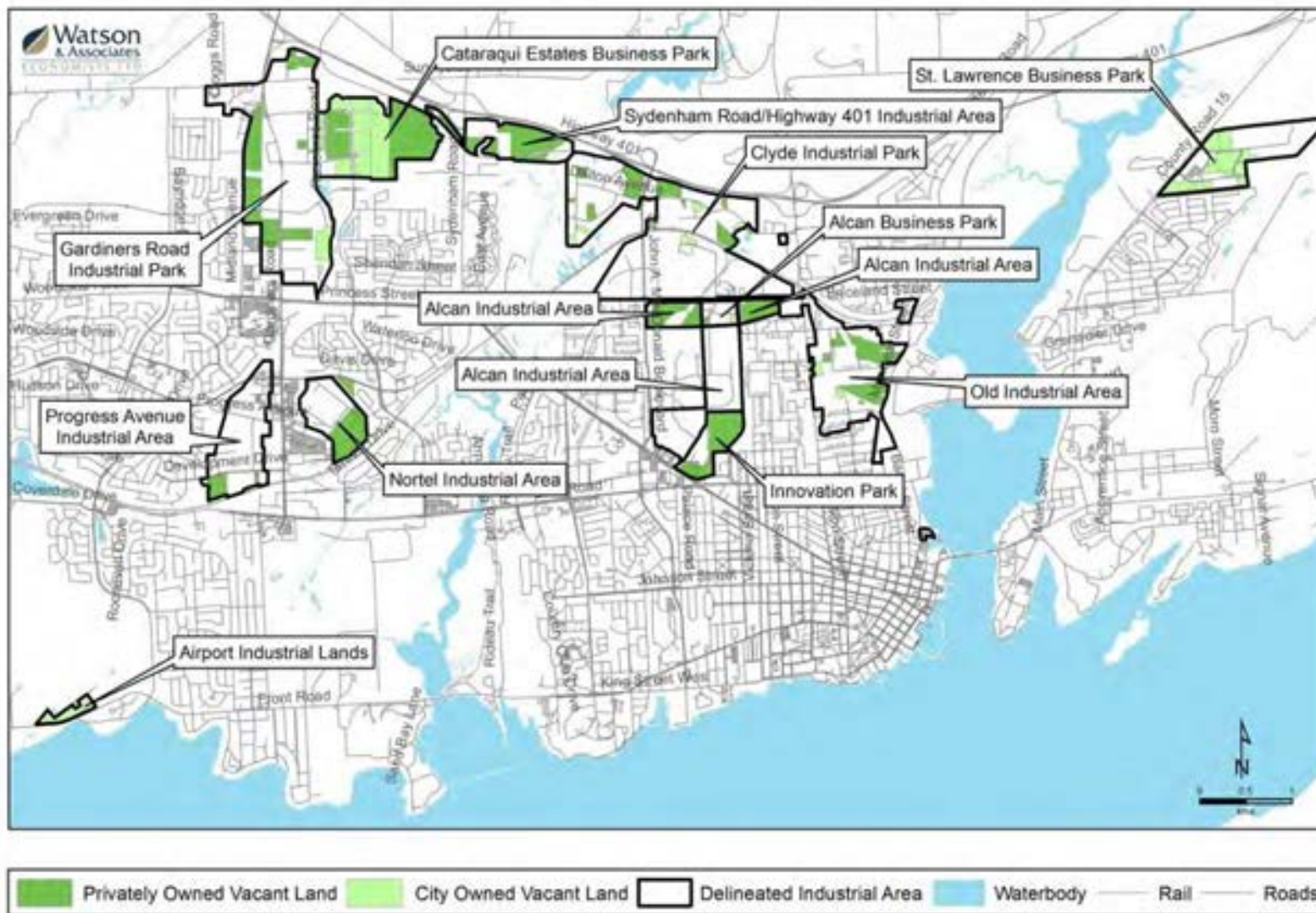


Figure 5-6

City of Kingston Industrial Lands - Vacant Land within the Urban Area



5.2.2 Serviced Shovel-Ready Lands

As of mid-2014, Kingston has approximately 135 net Ha (333 net acres) of shovel-ready industrial lands. Figure 5-7 summarizes the share of serviced shovel-ready industrial land, by parcel size. As shown, 38% of the vacant industrial land sites are less than 1 net Ha (2.5 net acres) in size. In comparison, sites measuring 1 to 2 net Ha (2.5 to 5 net acres) and 2 to 5 net Ha (5 to 12 net acres) represent 27% of sites, in each case. 8% of parcels measure 5 to 10 net Ha (12 to 25 net acres) in size and no shovel-ready parcels are larger than 10 net Ha (25 net acres). Given the lack of larger shovel-ready sites (i.e. sites larger than 5 Ha), Kingston currently offers limited opportunities to accommodate larger scale industrial development. There are, however, some opportunities to create larger lots within the City-owned vacant lands inventory. This includes parcels within the Cataraqui Estates Business Park which could be amalgamated to create one 25 Ha (62 acre) site. Recent industrial development activity trends suggest that there is some market demand for larger sites, largely in the distribution/logistics sector.

Figure 5-7
City of Kingston
Shovel-Ready Industrial Lands by Parcel Size

Site Size (Ha)	Area of Land (Ha)	Share of Land Area	Number of Sites	Share by Number
less than 1 Ha	15	11%	36	38%
1 - 2 Ha	22	16%	16	27%
2 - 5 Ha	70	52%	19	27%
5 - 10 Ha	28	21%	4	8%
10 Ha and Greater	0	0%	-	0%
Total	135	100%	75	100%

Source: Watson & Associates Economists Ltd.

Figure 5-8 summarizes the share of serviced shovel-ready industrial land by O.P. designation. As shown, approximately 64% of the parcels are designated General Industrial, 35% are designated Business Park Industrial and 1% are designated Waste Management Industrial.

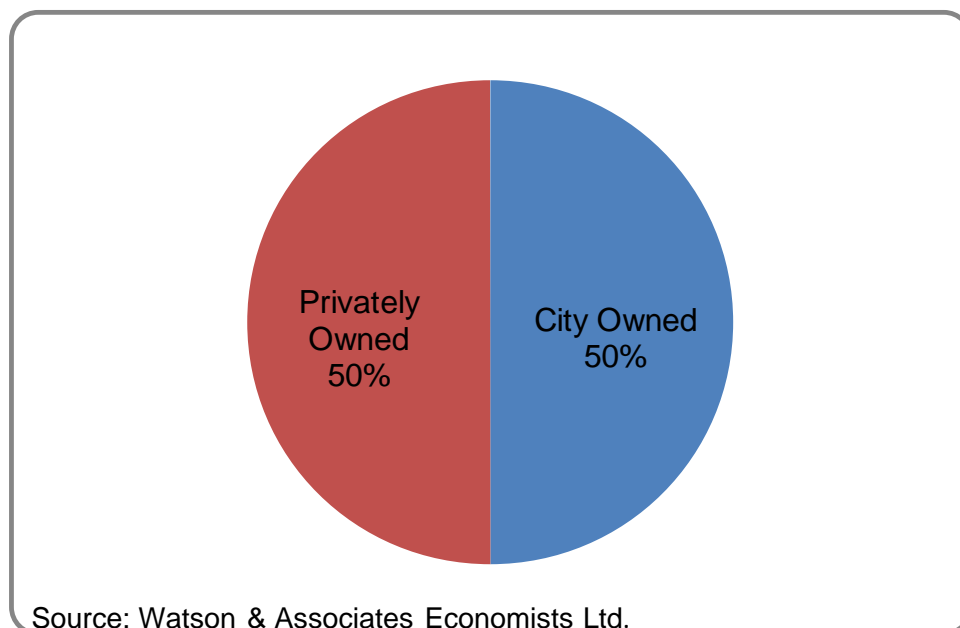
Figure 5-8
City of Kingston
Shovel-Ready Industrial Lands by Official Plan Designation

Official Plan Designation	Area of Land (Ha)	Share of Land Area	Number of Sites	Share by Number
General Industrial	76	56%	48	64%
Business Park Industrial	58	43%	26	35%
Waste Management Industrial	1	1%	1	1%
Total	135	100%	75	100%

Source: Watson & Associates Economists Ltd.

Figure 5-9 summarizes the share of serviced shovel-ready industrial land by ownership. As shown, 67 net Ha (approximately 50%) of the shovel-ready lands are City-owned.

Figure 5-9
City of Kingston
Shovel-Ready Industrial Lands by Ownership



Source: Watson & Associates Economists Ltd.

5.3 Market Choice Requirements

As a general rule of thumb, in order to allow for proper market functioning, it is recommended that a minimum five-year supply of serviced industrial lands (by various sizes, zoning and locations) is available at all times throughout the forecast period. Based on recent absorption trends, it appears that Kingston is currently meeting this requirement. However, despite the availability of vacant industrial land, market choice is somewhat limited, as summarized below:

- **Limited Supply of Larger Sized Parcels** – Although Kingston has a relatively healthy supply of small- to medium-sized parcels (i.e. less than 5 Ha), there is a limited number of larger vacant industrial land parcels (i.e. 5 Ha and greater) available for development. In order for Kingston to continue to be competitive and potentially attract larger scale industrial employers, such as large-scale manufacturers, logistics and distribution centres, the City needs to provide a greater number of larger serviced industrial sites.
- **Limited Supply of Prestige Industrial Lands** – While only one-third of Kingston’s inventory of shovel-ready sites is designated Business Park Industrial, the majority of development activity on industrial lands over the past decade has been prestige employment and accommodated on Business Park designated lands. This suggests that the mix of General Industrial and Business Park Industrial designated shovel-ready lands is not favourable relative to market demand.

Kingston needs to provide a balanced inventory of shovel-ready and zoned developable vacant industrial lands that is sufficient to meet market demand in the short to medium term. From a market choice perspective, one of the most important industrial site selection criteria, which is largely controllable by the City, relates to ensuring that an ample supply of suitable vacant serviced (and serviceable) industrial land is available for purchase and absorption. This involves providing a readily available and serviced industrial land supply which is well beyond forecast absorption, to fully provide for a range of site selection choices with respect to:

- price;
- site size;
- availability and cost of servicing;
- neighbourhood and setting;
- O.P. designation/zoning;
- visibility;
- highway access;
- privacy;
- topography;
- tenure (lease vs. design build vs. own); and
- other industrial land market requirements which can be added, including soil conditions, site proportioning (frontage to depth), timing of servicing, site expandability, etc.

Historically, the City has been the primary source of shovel-ready industrial land through its municipal industrial land development program. However, as highlighted in Section 5.2, City-owned industrial land supply is currently limited, which exacerbates the market-choice challenges identified. Potential opportunities to broaden the range and choice of vacant industrial land supply to meet forecast demand over the short, medium and long term are addressed in Chapter 11.

6. City of Kingston Forecast Employment Growth and Urban Industrial Land Needs

This Chapter presents a long-term employment forecast by major sector for the City of Kingston and a corresponding urban industrial land needs analysis for the 2014-2034 planning horizon.

6.1 Long-Term Employment Forecast

Future demand for industrial lands within Kingston is ultimately driven by forecast employment growth. A broad range of factors are anticipated to drive future employment growth in Kingston over the 2014 through 2034 period. These factors will not only impact the rate and magnitude of growth but will also influence the form and density of non-residential development and corresponding demand for industrial lands.

Based on a comprehensive investigation of local and regional employment growth drivers, a 20-year employment forecast by major sector was developed in accordance with the City's adopted long-term growth projections.¹ As shown in Figure 6-1, Kingston's total employment is forecast to increase from 71,370 in 2014 to 78,070 in 2024, and 81,615 by 2034. Over the forecast period, Kingston's employment base is expected to increase by 10,250. Figure 6-2 provides a more detailed summary of the long-term employment forecast by major sector. The employment forecast is based on the assumption that Kingston's population will reach 133,380 by 2024 and approximately 141,550 by 2034.²

¹ Adopted long-term employment projections presented in the City of Kingston and Kingston CMA Population, Housing and Employment Projections Report, 2013, by Meridian Planning Consultants and the Centre for Spatial Economics.

² As identified in the City of Kingston and Kingston CMA Population, Housing and Employment Projections Report, 2013, by Meridian Planning Consultants and the Centre for Spatial Economics.

Figure 6-1
City of Kingston
Employment Forecast, 2014-2034

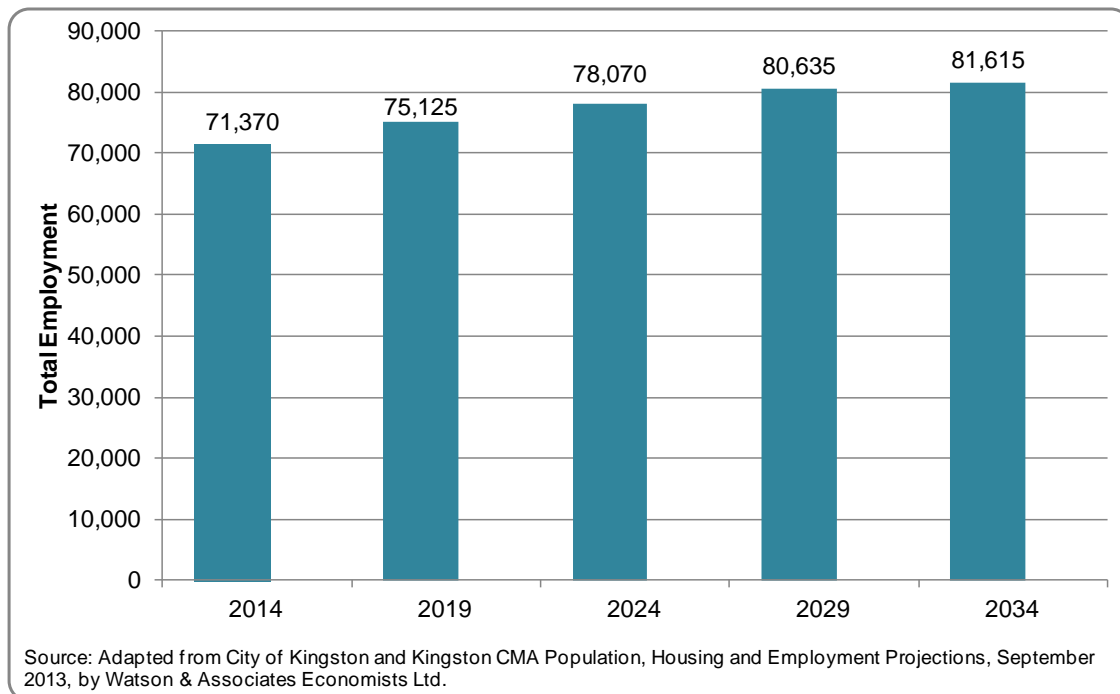


Figure 6-2
City of Kingston
Employment Forecast, 2014-2034

Year	Primary	Work at Home	Industrial	Commercial Office	Population Related Employment ¹	Total
2014	105	3,625	9,805	5,435	52,400	71,370
2019	105	4,095	10,250	6,020	54,655	75,125
2024	105	4,115	10,490	6,535	56,825	78,070
2029	105	3,980	10,700	6,965	58,885	80,635
2034	105	3,970	10,760	7,200	59,580	81,615
2014-2034	0	345	955	1,765	7,180	10,245

Source: Adapted from City of Kingston and Kingston CMA Population, Housing and Employment Projections, September 2013 by Watson & Associates Economists Ltd.

1. Reflects population-related commercial and institutional employment.

Incremental employment growth in 5-year increments is illustrated in Figure 6-3. As shown, employment growth is anticipated to be strongest over the 2014-2019 period (an increase of 3,755 jobs), with growth moderating over the remainder of the forecast period.

Figure 6-3
City of Kingston
Employment Growth Forecast, 2014-2034

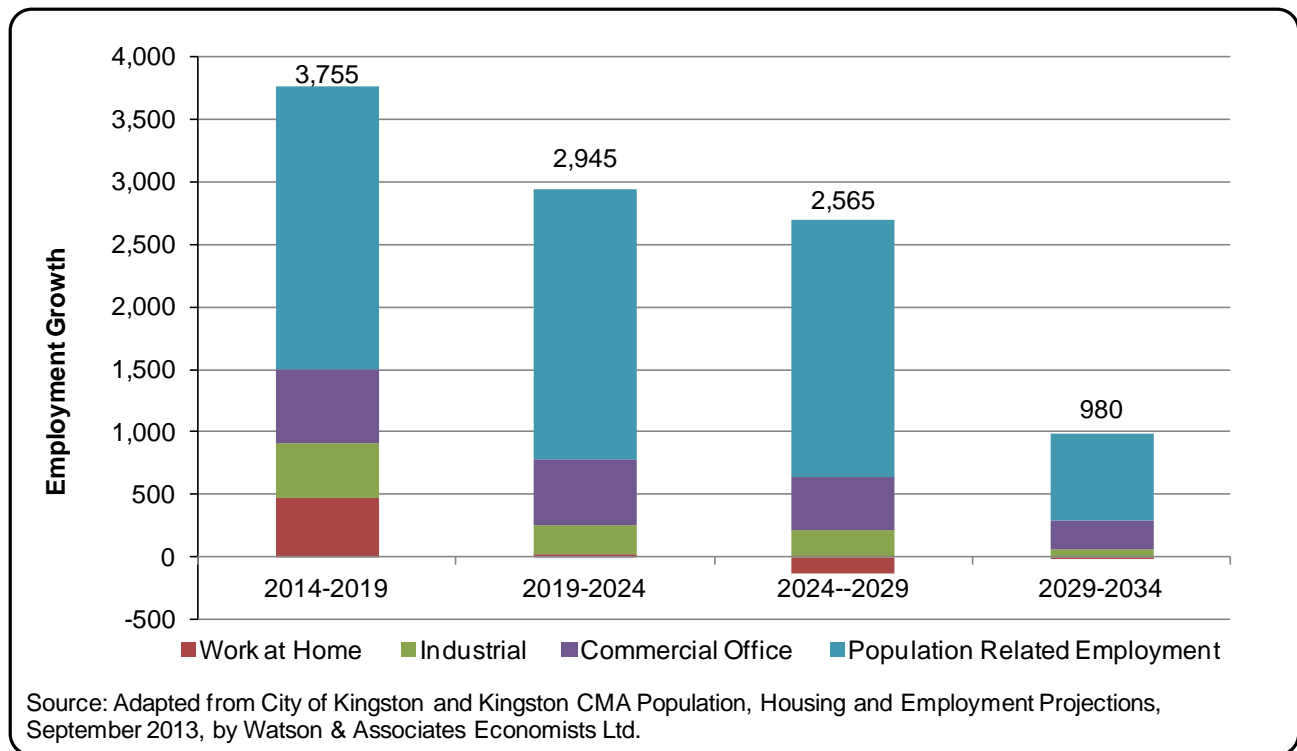
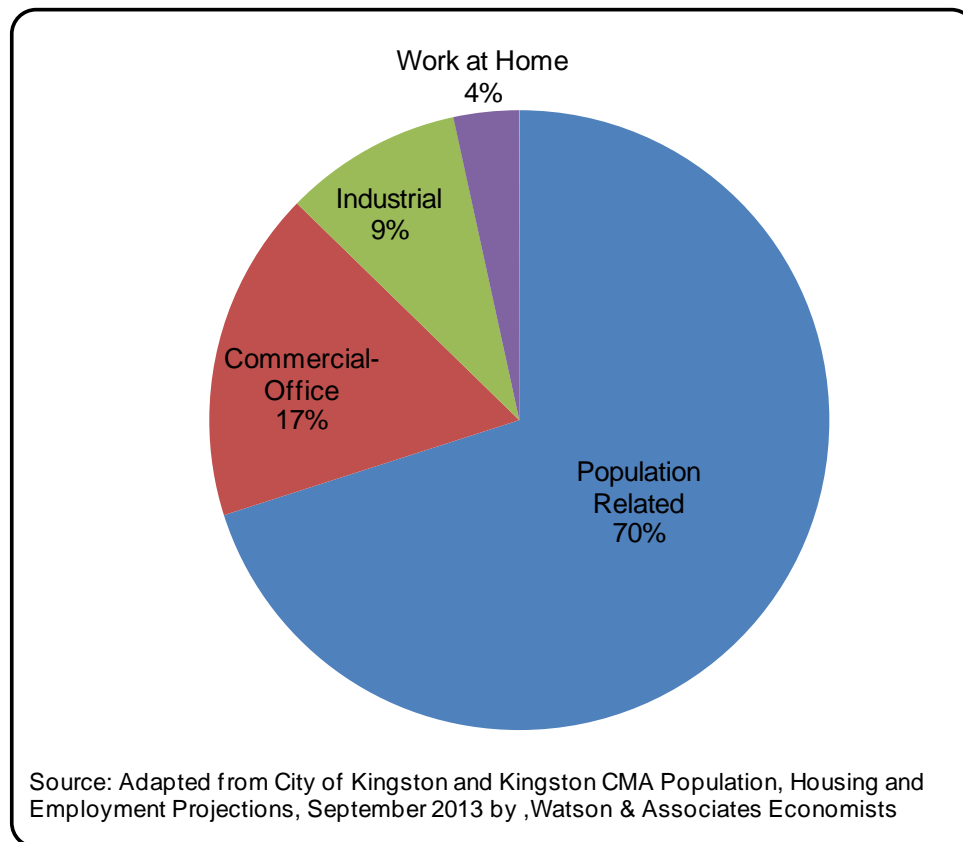


Figure 6-4 summarizes the 2014-2034 employment growth by major employment sector for Kingston. Over the forecast period, 70% of employment growth is anticipated in population-related sectors (commercial and institutional). In comparison, export-based sectors, including office commercial employment and industrial, are expected to account for 17% and 9% of City-wide employment growth, respectively. Work at Home is anticipated to account for 4% of employment growth.

Figure 6-4
City of Kingston
Forecast Employment Growth by Sector, 2014-2034



With respect to employment growth by major employment sector, the following observations have been made:

Population-Related Employment

The population-related employment sector, which reflects population-related commercial and institutional employment, represents the largest employment growth sector in Kingston, with an anticipated increase of 7,180 jobs over the 2014-2034 period, comprising approximately 70% of total employment growth. A large share of this growth is expected to be in retail, personal services and accommodation/food services. Kingston is anticipated to also experience a strong employment increase in the institutional sector, largely driven by the need for increased health services, higher education, government facilities and other institutional facilities (i.e. cultural, religious, schools) associated with population growth.

Commercial Office

Kingston is expected to experience a significant increase in knowledge-based employment driven, in part, by synergies with its post-secondary and government institutions. As a result, Kingston is expected to see a significant employment increase in business services, professional, scientific and technical services, and finance and insurance, which will be largely accommodated within stand-alone and multi-tenant office buildings. Commercial office employment is forecast to increase from 5,435 in 2014 to 7,200 in 2034, an increase of 1,765.

Industrial Employment

Kingston's industrial sector is anticipated to add approximately 955 new jobs to its base over the 2014-2034 period, accounting for 9% of total employment growth. The moderate level of industrial employment growth is anticipated to be driven by the wholesale trade/distribution, transportation and construction sectors. Though manufacturing is not expected to see strong employment growth, new manufacturing development is anticipated primarily in small- to mid-sized businesses.

Primary Employment

Primary industries (i.e. agriculture and other resource-based employment) comprise a relatively small proportion of Kingston's employment base (less than 0.1% in 2014). This sector is not anticipated to experience any significant employment growth over the 2014-2034 forecast period.

Work at Home Employment

Over the next 20 years, Kingston's work at home employment will steadily increase, driven by increased opportunities related to telecommuting and potential work schedule flexibility, most notably in knowledge-based employment sectors. Also, as Kingston's population and labour force continues to age, it is likely that an increased number of working and semi-retired residents will be seeking lifestyles which will allow them to work from home on a full-time or part-time basis. Over the 20-year forecast period, Kingston's work at home employment base is forecast to increase by 345 jobs.

6.2 Industrial Land Needs Forecast Approach

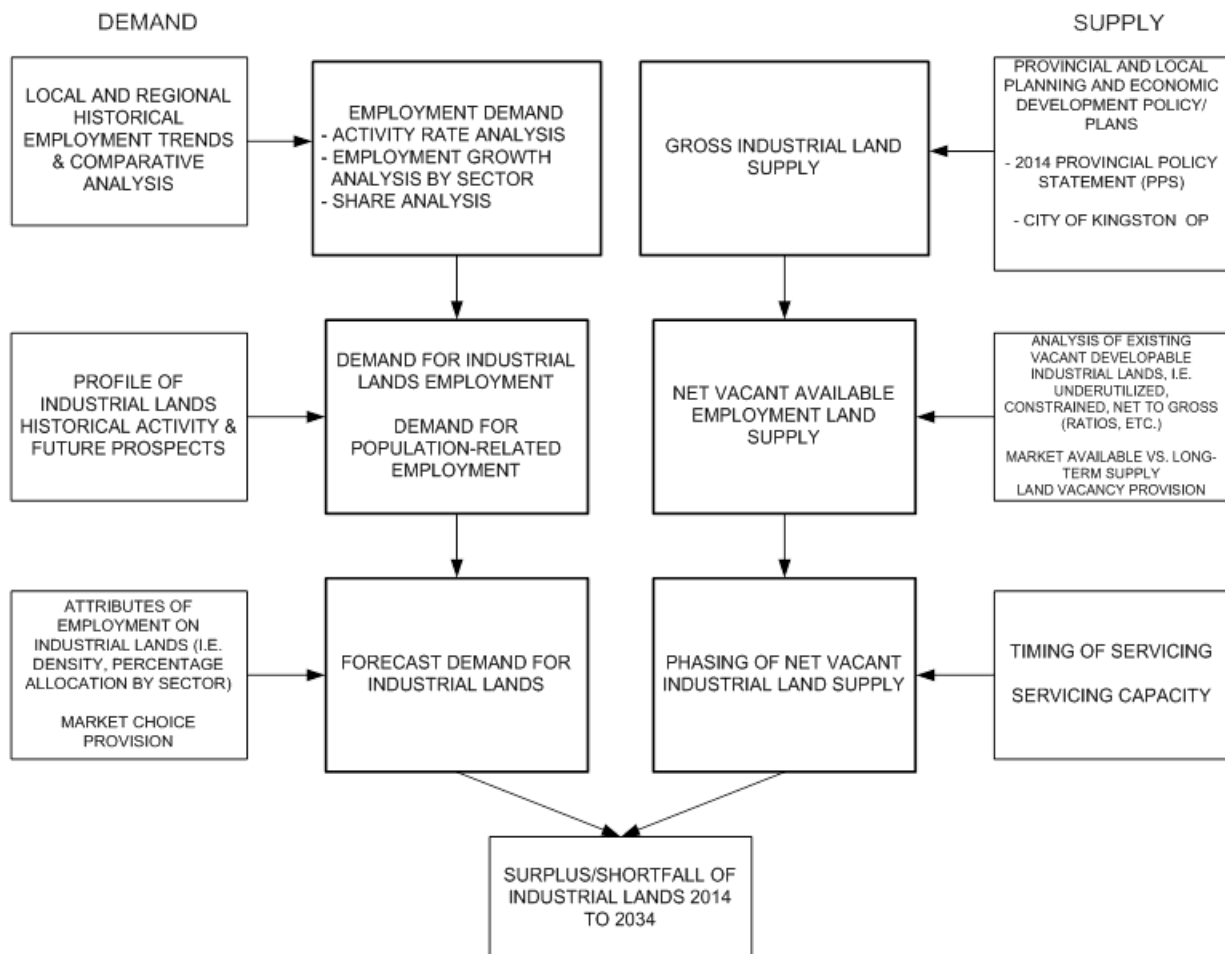
The most current provincially accepted approach to forecasting employment and land needs was developed in the last decade to reflect the broader types of employment in industrial areas. In 1995, as part of a *Planning Act* review, the Province published a document entitled, "Projection Methodology Guideline: A Guide to Projecting Population, Housing Need, Employment and Related Land Requirements," to be used in forecasting population and employment for planning purposes.

Building on the long-term employment forecast presented in Chapter 6.1, anticipated industrial land need requirements are then identified based on consideration of the following:

- Estimating the share of employment growth on industrial lands by I.C.I. (industrial, commercial, institutional);
- Existing and forecast density assumptions (i.e. employees/net hectare or acre) for industrial land employment;
- Historical and forecast industrial land employment absorption by employment type (i.e. general vs. prestige and sector (i.e. manufacturing, warehousing and distribution, office commercial, etc.)); and
- The amount of long-term net industrial lands currently designated for employment uses but currently not developed (vacant) within the City of Kingston.

Figure 6-5 graphically illustrates this approach.

Figure 6-5
City of Kingston
Schematic Approach to Forecasting Long Term Need for Industrial Land



6.3 Employment on Industrial Lands

The forecast demand for industrial land is ultimately driven by the forecast growth of employment on industrial lands. In generating industrial land area requirements for the City of Kingston, the following tasks have been undertaken:

1. Remove Work at Home Employment

As a first step, all estimated “Work at Home” employees have been excluded from the industrial land needs analysis, as these employees do not require land in the City’s industrial areas.

2. Determine the Amount of Employment by Sector to be Accommodated on Urban Industrial Lands

As previously identified, current definitions of industrial lands have broadened. Industrial lands continue to be a focus for industrial uses, but also include office and other non-residential uses.

A complete breakdown of employment by major sector on industrial lands was derived based on analysis of existing employment distribution and industrial/office G.F.A within Kingston. This, along with a review of permitted uses on industrial lands, helped inform the percentage breakdown by major sector on industrial lands used for the forecast period (2014-2034), as shown in Figure 6-6. Key observations include:

- 98% of forecast industrial employment growth is anticipated to be accommodated on urban industrial lands. A small share of industrial employment growth (2%) is expected to occur on rural industrial lands;
- A significant share (65%) of commercial office employment is forecast to be accommodated on urban industrial lands within stand-alone single/multi-tenant office buildings. The remaining 35% is expected to be accommodated within the downtown core and other commercial designated lands throughout Kingston; and
- 35% of population-related commercial/institutional employment growth is expected to occur on urban industrial lands, with the balance accommodated on other designated lands throughout Kingston.

Figure 6-6
City of Kingston
Proportion of 2014-2034 Employment Growth
on Industrial Lands by Employment Sector

Employment Sector	Percentage of Total City Employment on Urban Industrial Lands
Industrial	98%
Commercial-Office	65%
Population-related Commercial/Institutional	35%

Source: Watson & Associates Economists Ltd.

Figure 6-7 summarizes forecast employment on industrial lands over the short-term and long-term forecast periods, based on the assumed allocation of growth on industrial lands assigned by sector, as set out in Figure 6-6. As illustrated, over the 2014-2034 period,

Kingston's industrial lands are anticipated to accommodate 45% of Kingston's total employment growth. Over the 2014-2024 and 2014-2034 periods, employment growth on industrial lands is expected to total 2,945 and 4,600, respectively.

Figure 6-7
City of Kingston
Forecast Employment Growth on Industrial Lands, 2014-2034

Employment Type	Employment Growth by Sector				Employment Growth on Urban Industrial Lands				Percent of City-wide Employment Growth on Urban Industrial Lands
	2014-2019	2014-2024	2014-2029	2014-2034	2014-2019	2014-2024	2014-2029	2014-2034	
Primary	0	0	0	0	0	0	0	0	0%
Work @ Home	470	495	355	345	0	0	0	0	0%
Industrial	445	685	895	955	435	675	880	940	98%
Commercial-Office	585	1,105	1,530	1,770	380	720	995	1,150	65%
Population-related Commercial/Institutional	2,255	4,425	6,480	7,175	790	1,550	2,270	2,510	35%
Total	3,755	6,710	9,260	10,245	1,605	2,945	4,145	4,600	45%

Source: Watson & Associates Economists Ltd. Numbers may not add precisely due to rounding.

Determine Accommodation of Employment Growth through Intensification

It is recognized that a portion of forecast employment on industrial lands growth will be accommodated through intensification. Over the 2014-2034 period, an estimated 10% of employment growth is expected to be accommodated through intensification. It is anticipated that the majority of this intensification will be accommodated through infill, redevelopment and expansion of existing developed properties as discussed in Chapter 8. However, to evaluate the ability to meet this target, the City should monitor intensification development in industrial areas on a go-forward basis by tracking the location of building permit activity on industrial lands.

Identify Forecast Employment Density on Industrial Lands

As highlighted in Chapter 4, over the 2006-2013 period, employment density of development on industrial lands in Kingston has averaged 18 jobs per net Ha (7 jobs per net acre), comparable to the city-wide average. Structural changes in the economy are changing the character of economic activities on industrial lands and impacting employment density. Recent trends include:

- Increasing demand for warehousing/logistics and transportation uses for growing “goods movement” sectors which tend to be of lower employment density; and
- Increasing advanced manufacturing which is highly automated and less labour intensive than in the past, lowering employment density in the manufacturing sector.

Despite the general downward trend in employment densities, there are a number of factors which are anticipated to influence the physical nature of development on industrial lands across Kingston and help reverse the downward trend in employment density. These include:

- Anticipated increase in knowledge-based employment – intensive in human capital characterized by relatively high employment densities;
- Forecast growth in commercial office development which has much higher employment densities than industrial uses; and
- Overall declining share of industrial development on industrial lands with a broadening mix of commercial and institutional uses accommodated.

Given these factors, it is foreseeable that future employment densities on industrial land in Kingston will be moderately higher than observed through recent development trends. Based on the anticipated employment densities by sector, as shown in Figure 6-8 and the forecast employment mix on industrial lands by sector, summarized in Figure 6-7, a density of 25 jobs per net Ha (10 jobs per net acre) is forecast over the 2014-2034 period.

Figure 6-8
City of Kingston
Forecast Employment Density by Sector

Employment Sector	Jobs per net Ha	Jobs per net Acre
Industrial	14	6
Commercial-Office	50	20
Population-related Commercial/Institutional	26	11
Weighted Average	25	10

Source: Watson & Associates Economists Ltd.

The forecast density identified herein has been used in generating future land demand on industrial lands over the forecast period. It is recommended that the City monitor future density trends on industrial lands.

6.4 Industrial Land Demand

Figure 6-9 summarizes forecast demand for industrial lands from 2014-2034 in 5-year increments in accordance with the assumptions made in Section 6.3. Key observations include:

- Over the 2014-2034 period, 4,600 jobs are forecast to be accommodated on industrial lands;
- Kingston is forecast to absorb an annual average of 8 net Ha (21 net acres) of industrial land per year over the forecast period;
- Over the 2014-2034 period, the total industrial land demand is forecast to total 166 net Ha (410 net acres);¹ and
- Average annual absorption rates are forecast to gradually decrease over the forecast period.

Figure 6-9
City of Kingston
Forecast Industrial Land Demand, 2014-2034

Growth Period	Total Employment on Urban Industrial Lands	Intensification on Urban Industrial Lands ¹	Total Employment on Industrial Lands Adjusted for Intensification	Employment Density (jobs per net Ha)	Total Urban Industrial Land Demand (Ha)	Annual Urban Industrial Land Absorption (Ha)
2014-2019	1,605	160	1,445	25	58	12
2014-2024	2,945	295	2,650	25	106	11
2014-2029	4,145	415	3,730	25	149	10
2014-2034	4,600	460	4,140	25	166	8

Source: Watson & Associates Economists Ltd.

1. Assumes 10% of employment will be accommodated through intensification.

6.5 Industrial Land Needs

Figure 6-10 summarizes forecast industrial land need for Kingston over the planning horizon. In accordance with the existing supply of developable designated vacant industrial lands adjusted for vacancy factor identified in Chapter 5 (i.e. 215 net Ha or 531 net acres) versus long-term demand, municipal-wide, Kingston has sufficient supply of designated industrial lands to meet long-term needs to 2034. As of 2034, a net surplus of 50 net Ha (124 net acres) has been identified.

Figure 6-10
City of Kingston
Industrial Land Need (Demand vs. Supply), 2014-2034

¹ Total industrial land demand for 2014-2034 based on 8.3 net Ha per year X 20 years = 166 net Ha (20.5 net acres per year X 20 years = 410 net acres).

Figure 6-10
City of Kingston
Industrial Land Need (Demand vs. Supply), 2014-2034

	Period			
	2014-2019	2014-2024	2014-2029	2014-2034
Net Industrial Land Demand	58	106	149	166
Net Industrial Land Supply ¹	215	215	215	215
Net Industrial Land Surplus/ (Shortfall)	158	109	66	50

Source: Watson & Associates Economists Ltd.

Note: Numbers may not add precisely due to rounding

1. Adjusted for land vacancy factor

Although Kingston appears to be reasonably well positioned from a land supply perspective to meet anticipated market demand for industrial lands over the 20-year forecast period, the market choice of vacant prestige industrial lands and supply of City-owned lands is more limited. The following provides a needs analysis for prestige vs. general industrial lands and City-owned lands vs. privately owned industrial lands over the forecast period.

6.6 Industrial Land Needs by Land Type

The following provides an assessment of the forecast demand for prestige industrial land and general industrial land vs. available supply over the forecast period.

Prestige Industrial Land Needs

As highlighted in Chapter 5, Kingston has a limited supply of prestige industrial lands (i.e. Business Park Industrial designated lands). As discussed previously, the Ontario and Kingston economy is transitioning from goods to services production. The trend towards more knowledge intensive and creative forms of economic activity is evident across many sectors within both the broader and local economy. Kingston is anticipated to experience steady employment growth in a number of “knowledge-based” sectors including financial services, research and development, professional and scientific services, information technology, health and social services, education and the broader public sector. In planning for growth over the long term, these sectors are anticipated to be amongst the key

growth areas of Kingston's economy and largely accommodated on prestige industrial lands (Business Park Industrial designated lands).¹

Building on the industrial land demand analysis presented in Section 6.4, Figure 6-11 summarizes the forecast demand for prestige industrial land within the City of Kingston over the 2014-2034 period. As shown, it is estimated that Kingston's prestige industrial lands are anticipated to accommodate 71% of forecast employment growth on industrial lands, equivalent to 3,270 jobs.

Figure 6-11
City of Kingston
Forecast Employment Growth on Prestige Industrial Lands, 2014-2034

Employment Type	Employment Growth on Urban Industrial Lands				Employment Growth on Prestige Industrial Lands				Share of Employment Growth on Urban Industrial Lands Accommodated on Prestige Industrial Lands
	2014-2019	2014-2024	2014-2029	2014-2034	2014-2019	2014-2024	2014-2029	2014-2034	
Industrial	435	675	880	940	110	170	220	235	25%
Commercial-Office	380	720	995	1,150	380	720	995	1,150	100%
Population-related Commercial/Institutional	790	1,550	2,270	2,510	595	1,165	1,705	1,885	75%
Total	1,605	2,945	4,145	4,600	1,085	2,055	2,920	3,270	71%

Source: Watson & Associates Economists Ltd. Numbers may not add precisely due to rounding.

Figure 6-12 summarizes forecast demand for prestige industrial lands from 2014-2034 in 5-year increments assuming 10% intensification and an employment density of 29 jobs per net Ha (12 jobs per net acre).² As shown, over the forecast period the demand for prestige industrial land is expected to total 102 net Ha (252 net acres), representing 61% of total industrial land demand.

¹ In accordance with the City's O.P., Business Park Industrial designated lands are intended to be oriented more to office, research and development, and technology-related uses, while General Industrial designated lands are intended to be oriented more for industrial uses such as manufacturing and warehousing.

² Prestige industrial lands are expected to have a higher employment density than the overall industrial lands average since they typically accommodate a large share of higher employment density uses, including all of the City's office employment and a relatively high share of population related employment uses.

Figure 6-12
City of Kingston
Forecast Prestige Industrial Land Demand, 2014-2034

Growth Period	Total Employment on Prestige Industrial Lands	Intensification on Industrial Lands ¹	Total Employment on Prestige Industrial Lands Adjusted for Intensification	Employment Density (jobs per net Ha)	Total Prestige Industrial Land Demand (Ha)	Annual Prestige Industrial Land Absorption (Ha)
2014-2019	1,085	110	975	29	34	7
2014-2024	2,055	205	1,850	29	64	6
2014-2029	2,920	290	2,630	29	91	6
2014-2034	3,270	325	2,945	29	102	5

Source: Watson & Associates Economists Ltd.

1. Assumes 10% of employment will be accommodated through intensification.

Figure 6-13 summarizes forecast prestige industrial land need for the City of Kingston over the forecast period. In accordance with the existing supply of developable vacant Business Park Industrial designated lands adjusted for the vacancy factor identified in Chapter 4 (i.e. 98 net Ha or 242 net acres) versus long-term demand, Kingston has an insufficient supply of designated prestige industrial lands to meet long-term needs to 2034. As of 2034, a net deficit of 4 net Ha (10 net acres) has been identified.

Figure 6-13
City of Kingston
Prestige Industrial Land Need (Demand vs. Supply), 2014-2034

	Period			
	2014-2019	2014-2024	2014-2029	2014-2034
Net Industrial Land Demand	34	64	91	102
Net Industrial Land Supply ¹	98	98	98	98
Net Industrial Land Surplus/ (Shortfall)	64	34	7	-4

Source: Watson & Associates Economists Ltd.

Note: Numbers may not add precisely due to rounding

1. Adjusted for land vacancy factor

General Industrial Land Needs

Building on the industrial land demand analysis presented in Section 6.4, Figure 6-14 summarizes the forecast demand for general industrial land within Kingston over the 2014-

2034 period. As shown, it is estimated that Kingston's general industrial lands are anticipated to accommodate 29% of forecast employment growth on industrial lands, equivalent to 1,335 jobs.

Figure 6-14
City of Kingston
Forecast Employment Growth on General Industrial Lands, 2014-2034

Employment Type	Employment Growth on Urban Industrial Lands				Employment Growth on General Industrial Lands				Share of Employment Growth on Urban Industrial Lands Accommodated on General Industrial Lands
	2014-2019	2014-2024	2014-2029	2014-2034	2014-2019	2014-2024	2014-2029	2014-2034	
Industrial	435	675	880	940	325	505	660	705	75%
Commercial-Office	380	720	995	1,150	0	0	0	0	0%
Population-related Commercial/Institutional	790	1,550	2,270	2,510	200	390	570	630	25%
Total	1,605	2,945	4,145	4,600	525	895	1,230	1,335	29%

Source: Watson & Associates Economists Ltd. Numbers may not add precisely due to rounding.

Figure 6-15 summarizes forecast demand for general industrial lands from 2014-2034 in 5-year increments assuming 10% intensification and an employment density of 19 jobs per net Ha (8 jobs per net acre).¹ As shown, over the forecast period the demand for general industrial land is expected to total 65 net Ha (161 net acres), representing 39% of total industrial land demand.

¹ General industrial lands are expected to have a lower employment density than the overall industrial lands average since they typically accommodate a large share of lower employment density industrial uses.

Figure 6-15
City of Kingston
Forecast General Industrial Land Demand, 2014-2034

Growth Period	Total Employment on General Industrial Lands	Intensification on Industrial Lands ¹	Total Employment on General Industrial Lands Adjusted for Intensification	Employment Density (jobs per net Ha)	Total General Industrial Land Demand (Ha)	Annual General Industrial Land Absorption (Ha)
2014-2019	525	55	470	19	25	5
2014-2024	895	90	805	19	43	4
2014-2029	1,230	125	1,105	19	59	4
2014-2034	1,335	135	1,200	19	65	3

Source: Watson & Associates Economists Ltd.

1. Assumes 10% of employment will be accommodated through intensification.

Figure 6-16 summarizes forecast general industrial land need within Kingston over the forecast period. In accordance with the existing supply of developable vacant General Industrial and Waste Management Industrial designated lands and forecast long-term demand, Kingston has a sufficient supply of designated general industrial lands to meet long-term needs to 2034. As of 2034, a net surplus of 53 net Ha (131 net acres) has been identified.

Figure 6-16
City of Kingston
General Industrial Land Need (Demand vs. Supply), 2014-2034

	Period			
	2014-2019	2014-2024	2014-2029	2014-2034
Net Industrial Land Demand	25	43	59	65
Net Industrial Land Supply ¹	117	117	117	117
Net Industrial Land Surplus/ (Shortfall)	92	74	58	53

Source: Watson & Associates Economists Ltd.

Note: Numbers may not add precisely due to rounding

1. Adjusted for land vacancy factor

6.7 The City's Industrial Land Needs

Based on historical trends and anticipated development activity in the private sector, it is estimated that the City's industrial/business park developments will capture 60% of the city-wide industrial land demand over the 2014-2034 period. The forecast market share for the City is comparable to historical trends (as discussed in Section 4.2.8).

In accordance with this allocation of market share, it is estimated that forecast demand for industrial land within the City's industrial/business parks will total 99 net Ha (245 net acres) from 2014 to 2034, as summarized in Figure 6-17. Industrial land demand on City-owned lands is expected to average 5 net Ha (12 net acres) annually over the forecast period.

Figure 6-17
City of Kingston
City's Share of 2014-2034 Industrial Land Demand

Growth Period	Industrial Land Demand (Net Ha)			Average Yearly Absorption within City's Industrial Lands (Net Ha)
	Total	City-Owned ¹	Private Sector	
2014-2019	58	35	23	7
2014-2024	106	64	42	6
2014-2029	149	90	59	6
2014-2034	166	99	67	5

Source: Watson & Associates Economists Ltd.

1. Assumes City's industrial/business parks will capture 60% of city-wide industrial land demand over the 2014-2034 period

In accordance with the existing supply of developable vacant industrial lands and long-term demand, there is an insufficient supply of City-owned industrial lands to meet long-term needs to 2034, as summarized in Figure 6-18. As of 2034, a net deficit of 32 net Ha (79 net acres) has been identified.

Figure 6-18
City of Kingston
City-owned Industrial Land Need (Demand vs. Supply), 2014-2034

	Period			
	2014-2019	2014-2024	2014-2029	2014-2034
Net Industrial Land Demand	35	64	90	99
Net Industrial Land Supply ¹	67	67	67	67
Net Industrial Land Surplus/ (Shortfall)	32	3	-23	-32

Source: Watson & Associates Economists Ltd.

Note: Numbers may not add precisely due to rounding

1. Adjusted for land vacancy factor

6.8 Urban Residential and Commercial Land Needs

While it is beyond the scope of this study to provide a detailed residential and commercial analysis for the City of Kingston, an understanding of long-term residential and commercial land needs is important in ensuring that the City's urban land supply is well-balanced across all residential and non-residential uses and that long-term needs are being met within the context of the 2014 P.P.S. and City of Kingston Official Plan. Accordingly, a brief summary of the City's long-term residential and commercial land needs is provided below.

The City of Kingston Planning, Building & Licensing Services is responsible for monitoring its residential and non-residential urban land supply inventory on a regular basis. The latest urban land inventory was updated as of February 2014. With respect to urban residential land, the City has identified a total housing supply of 20,782 potential urban units within committed residential developments, pending applications, proposed secondary plans, other pending and committed applications and vacant residential lands designated for residential development.¹ With respect to housing demand, the 2013 City of Kingston and Kingston C.M.A. Population, Housing and Employment Projections study forecasts a total housing increase of 12,630 units over the 2011 to 2036 planning horizon, or 505 housing units per year on average.² It is assumed that a small portion (approximately 2%) of forecast housing would be allocated to the rural area, which generates an average annual urban housing forecast of 495 units. Based on the City's estimated future housing yield on vacant designated or underutilized residential lands, the City can accommodate housing growth over the next 42 years without the need to designate additional residential lands (i.e. 20,782 housing unit yield/495 housing units per year = 42 years). Though Kingston appears to have sufficient residential land supply to accommodate long term growth, a more detailed review of lands by City staff suggests that the City has a limited amount of land supply to meet medium-term demand. A number of key sites, including the Collins Bay Penitentiary lands and the Alcan District lands are not expected to be available for the development in the short to medium term which limits the market choice of housing supply opportunities over the next 5-10 years.

With respect to commercial land supply, the City of Kingston Planning and Development Department has identified a total vacant land supply of 83 net Ha as of December 31, 2013. A further 15% adjustment for local infrastructure would reduce the City's vacant commercial

¹ City of Kingston 2014 Development Charge and Impost Fee Background Study. Final Consolidated Report. October 6, 2014.

² City of Kingston and Kingston C.M.A., Population, Housing and Employment Projections. Meridian Planning, the Centre for Spatial Economics, September 2013.

land inventory to approximately 71 net Ha. Appendix A, Schedule 10a of the City of Kingston 2014 Development Charge and Impost Fee Background Study¹ provides a breakdown of employment by major sector as derived from the 2013 City of Kingston and Kingston C.M.A. Population, Housing and Employment Projections study over 10-year and 20-year planning horizons. Over the 20-year planning horizon, Kingston's commercial/population-related employment base is forecast to increase by 8,945 employees, of which approximately 60% of commercial employees are forecast to be located on commercial lands, while the remaining 40% are anticipated to be accommodated on industrial lands. Assuming an average coverage assumption of 30% and an average floor space per worker ratio (F.S.W.) of 550 sq.ft. per employee, the average employment density on commercial lands is assumed to be 59 employees per net Ha (24 employees per net acre). At this assumed density, Kingston's vacant commercial lands can accommodate 4,189 employees. Based on this high-level analysis, Kingston's existing vacant commercial land supply is sufficient to accommodate forecast commercial employment demand over the next 20 years. However, this analysis does not consider the developability of these lands or their ability to meet local population needs based on geographical location. It is recommended that further study be undertaken to better understand long-term commercial land requirements in Kingston.

6.9 Observations

At a high level, Kingston appears to be reasonably well positioned from a land supply perspective to meet anticipated market demand for industrial lands over the 20-year forecast period. However, Kingston has a shortage of vacant prestige industrial lands (i.e. Business Park designated lands) and City-owned lands to meet forecast demand. Further, this analysis does not consider the availability of shovel-ready lands and the timing/phasing of servicing new industrial areas to accommodate growth over the short, medium and longer term. This is discussed in detail in Section 11.

¹ City of Kingston 2014 Development Charge and Impost Fee Background Study. Final Consolidated Report. October 6, 2014.

7. Policy Context

This chapter considers the E.L.R. and Kingston's industrial land needs within a provincial and local planning context. Kingston's strategic and economic initiatives are also explored.

7.1 Provincial Policy Context

The 2014 P.P.S. requires that municipalities take a long-term perspective when planning for employment land uses and to ensure that the necessary infrastructure is provided to support current and projected needs of employment over a 20-year planning horizon. The 2014 P.P.S. recognizes that a longer term planning horizon (beyond 20 years) may be required to plan for the long-term protection of employment areas in order to align with the planning of infrastructure and public services facilities; however, the municipality cannot designate urban lands to accommodate projected residential or non-residential needs beyond a 20-year time frame.

Section 1.1.2 of the P.P.S. states that:

“Sufficient land shall be made available to accommodate an appropriate range and mix of land uses to meet projected needs for a time horizon of up to 20 years. However, where an alternative time period has been established for specific areas of the Province as a result of a provincial planning exercise or a provincial plan, that time frame may be used for municipalities within the area.”

“Within settlement areas, sufficient land shall be made available through intensification and redevelopment and, if necessary, designated growth areas.”

“Nothing in policy 1.1.2 limits the planning for infrastructure and public service facilities beyond a 20-year time horizon.”

Section 1.3.2.4 of the P.P.S. also states, “Planning authorities may plan beyond 20 years for the long-term protection of employment areas provided lands are not designated beyond the planning horizon identified in policy 1.1.2.”

The P.P.S. includes policies (Sections 1.3.2.3 and 1.6.8.3) which address strengthening the protection of employment areas in close proximity to corridors and facilities for goods movement. This is of particular importance to the City of Kingston given that most of the employment lands are located in proximity to major roadways and transportation corridors. Sections 1.3.2.3 and 1.6.8.3 of the P.P.S. state:

“Planning authorities shall protect employment areas in proximity to major goods movement facilities and corridors for employment uses that require those locations.”

“New development proposed on adjacent lands to existing or planned corridors and transportation facilities should be compatible with, and supportive of, the long-term purposes of the corridor and should be designed to avoid, mitigate or minimize negative impacts on and from the corridor and transportation facilities.”

The P.P.S. allows planning authorities to identify a settlement area or allow the expansion of a settlement area boundary only at the time of a comprehensive review and, according to Section 1.1.3.8 of the P.P.S.,

“only where it has been demonstrated that:

- a) sufficient opportunities for growth are not available through intensification, redevelopment and designated growth areas to accommodate the projected needs over the identified planning horizon;
- b) the infrastructure and public service facilities which are planned or available are suitable for the development over the long term, are financially viable over their life cycle, and protect public health and safety and the natural environment;
- c) in prime agricultural areas:
 1. the lands do not comprise specialty crop areas;
 2. alternative locations have been evaluated; and
 - i. there are no reasonable alternatives which avoid prime agricultural areas; and
 - ii. there are no reasonable alternatives on lower priority agricultural lands in prime agricultural areas;
- d) the new or expanding settlement area is in compliance with the minimum distance separation formulae; and
- e) impacts from new or expanding settlement areas on agricultural operations which are adjacent or close to the settlement area are mitigated to the extent feasible.”

More specifically, with respect to employment lands, Section 1.3.1 states:

“Planning authorities shall promote economic development and competitiveness by:

- a) providing for an appropriate mix and range of employment and institutional uses to meet the long-term needs;
- b) providing opportunities for a diversified economic base, including maintaining a range and choice of suitable sites for employment uses which support a wide range of economic activities and ancillary uses, and take into account the needs of existing and future businesses;
- c) encouraging compact, mixed-use development that incorporates compatible employment uses to support liveable and resilient communities; and
- d) ensuring the necessary infrastructure is provided to support current and projected needs.”

Section 1.3.2.2 of the P.P.S., provides direction to municipalities with regard to the conversion of employment lands:

“Planning authorities may permit conversion of lands within employment areas to non-employment uses through a comprehensive review, only where it has been demonstrated that the land is not required for employment purposes over the long term and that there is a need for the conversion.”

For the purposes of P.P.S. policies 1.1.3.8 and 1.3.2.2, a comprehensive review is an Official Plan review initiated or adopted by the planning authority or an Official Plan Amendment, which:

1. “is based on a review of population and employment projections and which reflect projections and allocations by upper-tier municipalities and provincial plans, where applicable; considers alternative directions for growth or development; and determines how best to accommodate the development while protecting provincial interests;
2. utilizes opportunities to accommodate projected growth or development through intensification and redevelopment; and considers physical constraints to accommodating the proposed development within existing settlement area boundaries;
3. is integrated with planning for infrastructure and public service facilities, and considers financial viability over the life cycle of these assets, which may be demonstrated through asset management planning;
4. confirms sufficient water quality, quantity and assimilative capacity of receiving water are available to accommodate the proposed development;

5. confirms that sewage and water services can be provided in accordance with policy 1.6.6; and
6. considers cross-jurisdictional issues.”

Section 22 (7.3) of the Planning Act further protects areas of employment by not providing an opportunity for an applicant to appeal based on the failure of a Council to approve an Official Plan Amendment for the conversion of employment lands to an alternate land use.

A key objective of the E.L.R. is to analyze the adequacy of the existing industrial land supply within Kingston to accommodate long-term growth and to review whether employment lands conversions would lead to a short-fall of supply and/or create incompatibility between surrounding designated industrial lands.

As part of this comprehensive review, underutilized, brownfield and redevelopment sites have also been identified. While the P.P.S. does not direct municipalities to identify intensification targets for non-residential lands, Section 1.1.2 generally directs municipalities to provide sufficient lands through intensification and redevelopment and, if necessary, designated growth areas.

The P.P.S. includes policies regarding rural areas and rural lands (Sections 1.1.4 and 1.1.5). Rural areas are noted as important to the Ontario economy and P.P.S. policies seek to leverage rural assets and amenities and protect the environment. The P.P.S. provides a clear distinction of the difference between rural areas and rural lands. Rural areas are defined as a system of lands, whereas, rural lands include only lands located outside settlement areas, according to the P.P.S.:

“Rural areas: means a system of lands within municipalities that may include rural settlement areas, rural lands, prime agricultural areas, natural heritage features and areas, and resource areas.”

“Rural lands: means lands which are located outside settlement areas and which are outside prime agricultural areas.”

Section 1.1.4.1 of the P.P.S. provides planning authorities with direction regarding creating healthy, integrated and viable rural areas:

- a) “building upon rural character, and leveraging rural amenities and assets;
- b) promoting regeneration, including the redevelopment of brownfield sites;

- c) accommodating an appropriate range and mix of housing in rural settlement areas;
- d) encouraging the conservation and redevelopment of existing rural housing stock on rural lands;
- e) using local infrastructure and public service facilities efficiently;
- f) promoting diversification of the economic base and employment opportunities through goods and services, including value-added products and the sustainable management or use of resources;
- g) providing opportunities for sustainable and diversified tourism, including leveraging historical, cultural and natural assets;
- h) conserving biodiversity and considering the ecological benefits provided by nature; and
- i) providing opportunities for economic activities in prime agricultural areas, in accordance with policy 2.3.”

When directing development on rural lands, the P.P.S. states in Section 1.1.5 that development should be compatible with the rural landscape, can be sustained by rural service levels and is appropriate to the infrastructure which is planned or available. Permitted uses on rural lands outlined in Section 1.1.5.2 of the P.P.S. are as follows:

- a) “the management or use of resources;
- b) resource-based recreational uses (including recreational dwellings);
- c) limited residential development;
- d) home occupations and home industries;
- e) cemeteries; and
- f) other rural land uses.”

7.2 Municipal Policy Context

City of Kingston Official Plan

The City adopted its O.P. on July 15, 2009 which was approved by the Province on January 27, 2010, with the exception of four matters under appeal that were referred to the Ontario Municipal Board and subsequently resolved. The current Official Plan has since been consolidated as of June 13, 2013 to reflect all approvals and modifications made to the Plan up to and including June 1, 2013.

The Official Plan provides a clear vision of areas of employment, as stated in Section 3.6:

“To support a strong and diversified economic base within the City, allowing for an expansion of the assessment base and providing a choice of jobs for its citizens while supporting the existing infrastructure networks.”

Echoing Section 1 (subsections 1 and 5) of the Planning Act, R.S.O. 1990, the City’s Official Plan describes areas of employment in Section 1.4 as:

“Areas of land designated in an official plan for clusters of business and economic uses including, without limitation:

- a. manufacturing uses;
- b. warehousing uses;
- c. office uses;
- d. retail uses that are associated with uses mentioned in clauses a) to c); and,
- e. facilities that are accessory to uses mentioned in clauses a) to d).”

The City’s Official Plan identifies three land use designations which fall under the general category of areas of employment (as defined herein), including Business Park Industrial, General Industrial and Waste Management Industrial. These designations are intended to provide a full range of industrial, manufacturing, research and development, technology and office jobs, and related uses, as stated in Section 3.6.1 of the Official Plan.

The following provides a brief description of the urban industrial land use designations:

Business Park Industrial: lands under this designation are intended to provide prominent locations for industrial and industrial-support uses in architecturally treated and finished buildings with a high quality landscaped setting that promotes a prestige corporate community. These areas promote prestige office, research and similar employment uses.

General Industrial: lands under this designation are intended to provide convenient locations for industrial sector uses. The uses are grouped into distinct employment areas to foster growth and mitigate adverse effects on residential or sensitive neighbouring uses.

Waste Management Industrial: lands under this designation are intended to provide suitable locations and conditions that may involve intrusive levels of noise, odour, dust and other emissions which may have unsightly visual impacts.

Section 3.6.3 of the Official Plan includes the City's role in managing and promoting employment lands:

"The City will provide for, facilitate, and support industrial development initiatives through:

- a. the provision of infrastructure and infrastructure improvements;
- b. the protection of industrial establishments from incompatible land uses that may jeopardize the viability and efficiency of industrial operations;
- c. the control of industrial development through the planned subdivision of land and an organized marketing strategy; and,
- d. the development of City-owned lands within areas of employment."

In addition, the City supports the redevelopment of older areas of employment, with respect to the revitalization of older uses and facilities, the establishment of new industrial uses, the improvement and expansion of public infrastructure, and the relocation of incompatible uses to more appropriate locations, as stated in Section 3.6.8 of the Official Plan.

Section 3.6.A of the Official Plan includes policies for the Business Park Industrial designation with a goal of attracting "prestige office, research and similar employment uses at visible and physically accessible locations within the City." The frontages of Montreal Street and Division Street are identified (Section 3.6.A.7) as specific locations that are encouraged for Business Park uses in accordance with the policies in Section 3.6.A. Section 3.6.A.6 identifies an area within the Airport designation for the Norman Rogers Airport where additional Business Park Industrial is permitted, subject to provisions that are specific to the Airport designation.

With respect to preserving areas of employment, the City has stated, in Section 3.6.4 of the Official Plan:

"The City will take an active role in preserving areas of employment for future job growth. A sufficient supply of land designated for employment uses must be maintained within the Urban Boundary in order to meet anticipated short and long-term needs, including an adequate supply of serviced land and an allowance for choice in terms of location, size of property, and servicing needs."

Preserving areas of employment is critical for the City, as it has set an employment target in the Official Plan of 700 (net) new jobs per year and a total of approximately

14,000 jobs by 2026. The majority of the growth will be directed to lands located within the Urban Boundary as stated in Section 2.2.3.¹

Section 3.6.5 of the Official Plan states the approach the City will undertake in evaluating proposals for redesignation of areas of employment:

“Proposals for the redesignation of lands for uses other than those permitted in areas of employment, or to add a range of uses to an area of employment that are primarily permitted in another land use designation, will not be approved unless it has been demonstrated to the satisfaction of Council that the land is not required for employment area uses over the long term, and that there is a need for the redesignation. The following criteria will be considered as part of the assessment of whether the proposed redesignation is appropriate:

- a. the proposal will only be considered in conjunction with a review that addresses the following matters to the satisfaction of Council:
 - the proposal will not detrimentally affect the short and long term employment area land supply of the City, the supply of serviced land, or jeopardize the City’s capacity to meet its long term requirements for areas of employment;
 - the intensity, characteristics and impacts associated with the proposed use will not detrimentally impact the viability, desirability, or the proper servicing of existing and future surrounding land uses;
 - the site’s physical and natural characteristics, development constraints, and location will justify the consideration of non-employment uses on the subject lands; and
 - redesignation of areas of employment abutting major transportation corridors, including railways, highways and major arterial roads is discouraged; and,
- b. in addition to subsection a. above, the proposed redesignation must meet the following conditions:
 - the amount of land affected is minor in area based on the projected employment area land requirements within the planning horizon of this Plan;

¹ It is noted that the revised employment forecast (reference scenario) for the City of Kingston C.M.A. Population, Housing and Employment Projections prepared by Meridian Planning and The Centre for Spatial Economics, updated October 17, 2013, p.66., forecasts a lower annual long-term population forecast than that which is currently referenced in the City of Kingston O.P.

- the development of the subject lands is demonstrated to the satisfaction of Council not to be feasible for employment area uses within the planning horizon of this Plan;
- there are no alternative sites, designated and approved for the proposed use elsewhere in the City;
- the proposal will have a beneficial impact on the surrounding uses and broader community; and,
- the development of the subject lands for non-employment uses will meet a public need identified by Council resolution.”

Zoning By-Laws

The City of Kingston currently operates with 10 zoning by-laws, including five main zoning by-laws. Three of the five main zoning by-laws generally cover the City of Kingston's areas of employment: City of Kingston Restricted Area (Zoning) By-law 8499; Township of Kingston (Zoning) By-law 76-26; and Pittsburgh Township Restricted Area (Zoning) By-law 32-74.

Zoning categories for employment areas in Kingston include the following:

- City of Kingston Zoning By-Law No. 8499
 - Industrial (M, M1, M2, M6, M7);
 - Waterfront Industrial (M5);
 - Fuel Storage and Limited Light Industrial (M8); and
 - Business Park (BP).
- Township of Kingston Restricted Area By-law: Zoning By-law No. 76-26 (industrial lands in the west):
 - General Industrial (M1);
 - Light Industrial (M2);
 - Service Industrial (M3);
 - Disposal Industrial (M4);
 - Extractive Industrial (M5);
 - Restricted General Industrial (M6); and
 - Business Park (BP).
- Township of Pittsburgh Zoning By-law No. 32-74 (industrial lands in the east):
 - Business Park (BP);
 - Restricted Industrial (M1);
 - General Industrial (M2);
 - Extractive Industrial (MX); and
 - Disposal Industrial (MD).

7.3 Other Relevant Planning/Economic Studies

7.3.1 Urban Growth Strategy

The Urban Growth Strategy, approved by Council in 2004 was used in the development of the City's Official Plan. The purpose of the Urban Growth Strategy was to guide future growth and development in the newly amalgamated City of Kingston to 2026. In 2007, the City prepared an Urban Growth Management Strategy which implemented the Urban Growth Strategy Study to guide future development in Kingston to 2026.

In April 2014, an Urban Growth Boundary Update was approved by Council. The purpose of the report was to provide an assessment of the status of the City's current Urban Boundary and its ability to accommodate residential growth and associated infrastructure implications. The report identified that the current urban boundary did not need to be expanded based on residential growth requirements, however, it did not consider future industrial land requirements.

7.3.2 Kingston's Strategic Plan, 2011-2014

The Strategic Plan outlines the emerging priorities and key strategies to be pursued to help achieve the community's vision of becoming Canada's Most Sustainable City. It provides a corporate focus using the four pillars of sustainability and promotes Council's priorities. It is a tool intended to guide departmental plans, service delivery models and budgets.

Increasing the supply of employment land for sale by the municipality, embracing opportunities for intensification and redeveloping contaminated lands (brownfields) are among the key priorities of the plan.

The City plans to increase the supply of employment land by preparing a plan for Cataraqui Industrial Estates Phase 4 and by recently purchasing three properties (Brown Property, Clogg's Road and former O.R.C. Lands) with the intent of developing them for industrial uses. The City is also encouraging intensification and aggressively promoting brownfields redevelopment through the development of City-owned sites, and by promoting through policies and incentives the redevelopment of privately-owned brownfield sites. In addition, the City will explore opportunities for the City to acquire certain brownfield properties for rejuvenation.

7.3.3 K.E.D.C.O. Strategic Plan “Kingston 2020”

A key highlight the Kingston Economic Development Corporation’s (K.E.D.C.O.’s) strategic plan is to create 5,000 new jobs in Kingston by 2020. The strategic plan has identified high priority growth sectors for business marketing and development to achieve this target, including:

1. Agri-Business;
2. I.C.T./Defence;
3. Sustainable Emerging Technologies; and
4. Healthcare.

The plan outlines the strategy for K.E.D.C.O. in addressing these high priority growth sectors:

- Attract new investment to the City of Kingston in identified high priority growth sectors,
- Support growth of local businesses and organizations in high priority growth areas, and
- Ensure active labour force meets growth needs within high priority growth sectors.

The plan notes that based on “a review of opportunities and challenges within these sectors, it is apparent that each market demands support and expertise for the attraction of new jobs and investment as well as support for the market growth at a local level.”¹

7.3.4 Kingston Norman Rogers Airport 2007 Master Plan

The Kingston (Norman Rogers) Airport has been owned, maintained and operated by the City of Kingston since 1974. The Airport’s long-term vision is to provide the residents and businesses of the City of Kingston and the surrounding communities with access to convenient and cost-effective air transportation services in a socially and fiscally responsible manner, while being progressive in its efforts to promote, develop and upgrade the Airport’s lands and facilities.

¹ Kingston Economic Development Corporation Website – K.E.D.C.O. Strategic Plan 2015-2020, <http://business.kingstoncanada.com/en/about-us/strategicplan.asp> accessed February 5, 2014.

The majority of lands are designated Airport and the predominate use of the lands is for the landing, taking off and servicing of aircraft. The Master Plan identifies three general areas, totalling 42 Ha (104 acres) within the existing Airport for non-aviation industrial/commercial development.

The Master Plan identifies short-term, mid-term and long-term improvements for the Airport. Among these planned improvements, the City is to develop leased building lots for Business Park use which includes phasing over the short, mid and long term.

7.3.5 Kingston Airport Expansion Studies

The City of Kingston is in the final stages of concept development for the potential expansion of the runway and terminal for the Kingston Norman Rogers Airport. A series of studies were completed by consultants and the City that outlined infrastructure plans for the Airport expansion and that also examined the cost and economic impact of the expansion. The Airport expansion will allow the Airport to accommodate planes which are larger and faster. The Business Case report identified the fact that rising fuel prices and crew expenses have greatly reduced the profitability of smaller airplanes (less than 70 seats), so airlines are gradually phasing out smaller aircraft in favour of larger planes that operate at less frequency. In order to accommodate the shift to larger aircraft the basic infrastructure, adequate runway length and air terminal capacity to serve larger planes that carry more passengers will need to be provided for the Kingston Airport. It is noted that until the runway length is extended by a minimum additional 1,000 feet, the Airport will likely be restricted to smaller regional aircraft, primarily turbo-prop aircraft.¹

The Airport currently handles about 180 trips (started or ended) daily, over 65,000 passengers annually and provides direct employment of 117 jobs and supports an indirect employment of 339 jobs in the City.² It is estimated that with the expansion of the Airport, passenger traffic by 2026 using the medium forecast (representing the mostly likely scenario) would grow to 116,000. Benefits of the Airport expansion include supporting Kingston's growth as a centre for innovation and knowledge by enhancing the City as a destination choice for business and tourism, as well as supporting Queen's

¹ Kingston Airport Expansion – Project Definition and Class “C” Cost Estimate Report to Council, November 5, 2013 and Base Case for Kingston Airport Expansion prepared by LPS AVIA Consulting, January 20, 2012.

² Airport Infrastructure Expansion, Concepts for Public Information Session, prepared by the City of Kingston, February 25, 2013.

University (a growing institution in the City) and its need for connectivity within Canada and the U.S.¹

The expansion of the Airport is expected to have a minimal impact on cargo service. It is noted that major national/global logistics companies have designed their networks, with hubs in the Toronto/Hamilton area, to maximize reliability and minimize costs and there is limited opportunity given the capacity of the Airport to expand its air cargo service to other companies.³

7.3.6 City of Kingston Transportation Master Plan

In 2004, a multi-modal Transportation Master Plan was prepared for Kingston which outlines the City's strategic direction for the development of its transportation networks, programs and priorities.² The Transportation Master Plan provided a series of recommendations of which one directly impacts industrial areas:

- Identify and develop a goods movement network that maintains adequate access to industrial and commercial areas while minimizing the impact on residential neighbourhoods. The network will respect the hierarchy of roads, focusing routes on freeways and arterial roads such as Montreal Street, Division Street, Sir John A. Macdonald Boulevard, Gardiners Road, Princess Street, Bath Road, Highway 2 and other key linkages to serve the City.

An update of the Transportation Master Plan was prepared in 2009 which identified a number of roadway improvements based on updated traffic modelling data.³ A number of roadway improvements were identified which will have an impact on Kingston's industrial areas and influence the development patterns in the City. These include:

Recommended Road Improvements, 2009-2019:

- Counter Street (now known as John Counter Boulevard) widening from 2 to 4 lanes – Division Street to Princess Street;
- 3rd bridge crossing of Cataraqui River – new construction of a 2-lane bridge connecting Elliott Avenue and Gore Road;
- Wellington Street extension from Bay Street to John Counter Boulevard;

¹ Base Case for Kingston Airport Expansion prepared by LPS AVIA Consulting, January 20, 2012.

² City of Kingston Transportation Master Plan, July 2004.

³ City of Kingston Transportation Model Update Model Development & Calibration Report, July 30, 2009, AECOM Canada Ltd.

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- Elliott Avenue new construction – Division Street to Mid-Block (4 lanes);
 - Cataraqui Woods new construction of a 2-lane road – Sydenham Road to Centennial Drive;
 - Centennial Drive new construction of a 2-lane road – Cataraqui Woods to East of Gardiners Road; and
 - Division Street widening from 4 to 6 lanes - Counter Street to Highway 401.

Recommended Road Improvements, 2019-2029:

- Gardiners Road widening from 4 to 6 lanes – Centennial Drive to North Ramp of Highway 401; and
- Leroy Grant new construction of a 2-lane road – Elliott Avenue to Concession Street.

The planned road improvements are expected to enhance circulation and access to a number of key industrial areas in the City. The City is currently updating the Transportation Master Plan (2014 K.T.M.P.) which is expected to be completed in 2015.

Based on the 2014 Development Charge and Impost Fee Background Study prepared by Watson & Associates Economists Ltd. (October 6, 2014), the following road improvements have been identified:

- John Counter Boulevard widening from 2 to 4 lanes – Sir John A. Macdonald Boulevard to Princess Street, including a bridge over C.N. railway line;
- John Counter Boulevard widening from 2 to 4 lanes – Division Street to mid-block;
- Centennial Drive new construction of a 2-lane road from Resource Road to 520 metres east of Gardiners Road;
- Leroy Grant Drive new construction of a 2-lane road – Elliott Avenue to Concession Street;
- 3rd bridge crossing of Cataraqui River – new construction of a 2-lane bridge connecting John Counter Boulevard and Gore Road;
- Wellington Street new construction of a 2-lane road – Bay Street to John Counter Boulevard;
- Highway 15 widening from 2 to 4 lanes – Highway 2 to Gore Road; and
- Cataraqui Woods new construction of a 2-lane road – Sydenham Road to 560 metres east.

To date, the following developments have been made with regard to the key roadway improvements identified:

- Extension of Centennial Drive north of Cataraqui Woods Drive to Resource Road;
- Widening of John Counter Boulevard between Division Street and Sir John A. Macdonald has been completed (2013);
- Ministry of the Environment Provincial Class Environmental Assessment (E.A.) Study Report on the third bridge crossing was completed in 2013. In 2013, a report to Council entitled, “Third Crossing – Action Plan” was prepared which outlines a four-phase course of action, including time and capital budget requirements; and
- The Wellington Street Extension E.A. was approved in June, 2008.

Kingston Transit also provides public transit service to Kingston’s industrial areas, providing for employee commuting and customers to access areas.

8. Assessment of Kingston's Industrial Areas

A major factor in the future competitiveness of Kingston's economic base is dependent, in part, on the attributes of its industrial areas. Building on the profile of industrial areas provided in Section 4, this Section provides a comprehensive assessment of Kingston's key industrial areas and their ability to accommodate forecast industrial land demand.

8.1 General Characteristics of Industrial/Business Parks

Industrial/business parks (employment areas) require good access to regional transportation networks, on-site infrastructure including roadways and utilities, a critical mass and available zoned, shovel-ready land. Industrial/business parks are typically located on flat to slightly rolling topography in areas with minimal environmental issues. Roadways within industrial/business parks tend to be laid out in a grid system to optimize circulation and parcel configuration. Parcels are typically square or rectangular in shape to optimize site design. Many of these attributes help to optimize the end-users' speed to market, while minimizing development costs and project risk.

The specific attributes that are required for an industrial/business park to be successful are largely based on the intended function and designations. These are discussed in more detail below, with regard to general industrial parks, business parks and research and development parks.

General Industrial Parks

Industrial Areas have a more general industrial orientation and accommodate largely industrial uses such as advanced manufacturing, logistics, distribution and transportation sectors. Examples of these types of industrial areas within Kingston include the Clyde Industrial Park and Gardiners Road Industrial Area. These areas typically offer the following physical requirements:

- **Access** – Proximity to controlled access highways (i.e. Highway 401) is critical for the success of general industrial parks that have a significant degree of manufacturing, warehousing, distribution and logistics. These parks do not necessarily have to be adjacent to a controlled access highway but must be in proximity and easily accessible via major arterials that pass through limited residential or mixed-use commercial area(s);

- **Critical Mass** – Size is vital to ensure a wide selection/flexibility of land options and parks must include a sufficient supply of large parcels. As a minimum, 80 Ha (200 acres) is a suitable size for a park, in order to reach the critical mass needed to provide reasonable presence, choice and economies of scale;
- **Location** – Location must provide efficient and effective vehicular access and circulation, particularly for heavy truck traffic, with a minimum of two access points to enter/exit the industrial park;
- **Land Use Compatibility** – Buffering is important for general industrial parks in order to minimize noise and air pollution to neighbouring residential and other sensitive land uses;
- **Market Choice** – Parcel size and configuration needs to be conducive for a wide range of industrial land uses, especially for land extensive uses such as wholesale trade and transportation; and
- **Competitive Development/Operating Costs** – Land prices must be competitive, given the relatively land-extensive nature associated with many uses in general industrial parks.

Business Parks

Industrial Areas which are more oriented for business park designation, such as the St. Lawrence Business Park, have a more prestige character than general industrial parks and have moderately different requirements, including:

- **Access** – Access and exposure/visibility to controlled access highways or major arterial roadways are more critical for business parks, particularly for corporate offices;
- **Critical Mass** – Size is less important relative to general industrial parks but the business park must be generally large enough to foster a sense of place within a well-defined precinct and to allow for on-site amenities;
- **Land Use Compatibility** – More moderate buffering is sufficient for business parks which are more concerned about vandalism, theft, etc.; and
- **Character** – Business parks should present a more prestigious image, created through high quality building design, streetscapes and attractive landscaping.

Research and Technology Oriented Parks

Research and technology oriented parks, such as the Queen's Innovation Park, have the following requirements, which are quite different from attributes required for more traditional industrial/business parks:

- **Access** – Access to 400 series/limited access highways is less important for research and technology oriented parks. Heavy truck traffic tends to be limited and reasonable access via arterial roads is sufficient;
- **Location** – The most critical location attribute is proximity/access to related employment cluster(s) and supporting institutional and government entities, facilitating both private sector enterprise and academic initiatives;
- **Character** – A prestige image is critical for their success and must include high quality streetscapes, attractive landscaping and greenspace. Access to alternative forms of transport is also desirable; and
- **Critical Mass** – Size is less critical than for traditional industrial/business parks with typical land areas ranging between 10 and 25 Ha (25 and 60 acres).

8.2 Potential to Accommodate Development within Industrial Areas

The physical attributes of Kingston's existing and future industrial areas play a major role in the competitiveness of its economic base. These attributes are discussed in detail below.

8.2.1 Market Choice and Quality of Vacant Industrial Lands by Industrial Area

As previously discussed, market choice of shovel-ready industrial lands is critical to the competitiveness of Kingston's industrial land base. Figure 8-1 summarizes these observations with regard to the supply of shovel-ready lands, designated greenfield lands and constrained lands within Kingston's existing industrial areas. Key observations include:

- The majority of Kingston's shovel-ready land supply is located in the northwest (Gardiners Road Industrial Area and Cataraqui Estates Business Park), with a moderate supply offered in the St. Lawrence Business Park. Shovel-ready land supply opportunities are limited in the other industrial areas;
- Cataraqui Estates Business Park and the Sydenham Road/Highway 401 Industrial Area have the largest supply of unserviced lands with potential to accommodate future growth;
- In contrast, the Progress Industrial Area and Alcan Business Park are approaching buildout with limited supply opportunities, while the majority of vacant industrial lands within the Old Industrial Area are constrained;
- Innovation Park and the Nortel Industrial Area have no shovel-ready supply of industrial land but do offer some unserviced greenfield land supply for future expansion; and

- Gardiners Road Industrial Area, Cataraqui Estates Business Park and St. Lawrence Business Park offer the widest market choice in terms of parcel size. The remaining industrial areas which have shovel-ready lands offer mostly small parcels (<2 Ha).

Figure 8-1

City of Kingston Industrial Land Supply Opportunities by Industrial Area

Industrial Area	Total Size (Net Ha)	Developed Land	Vacant Land (Net Ha)	% Built Out	Shovel-ready Land (Net Ha)	Market Choice-Parcel Size (Net Ha)	Unserviced Lands ¹ (Net Ha)	Constrained Lands ² (Net Ha)
Airport Industrial Lands	7	0	7	0%	7	1 - 2 ha	0	0
Alcan Business Park	9	8	2	82%	2	1 ha	0	0
Alcan Industrial Area	78	62	16	79%	0	-	16	0
Cataraqui Estates Business Park	76	3	73	4%	36	<1 - 5 ha	37	0
Clyde Industrial Park	196	173	23	88%	15	<1 - 2 ha	7	1
Gardiners Road Industrial Area	162	122	40	75%	40	1 - 6 ha	0	0
Innovation Park	24	8	16	35%	0	-	16	0
Nortel Industrial Area	38	25	13	66%	0	-	13	0
Old Industrial Area	85	66	19	77%	4	<1 - 2 ha	0	15
Progress Industrial Area	59	53	7	89%	7	<1 - 1 ha	0	0
St. Lawrence Business Park	64	41	23	64%	23	<1 - 5 ha	0	0

Source: Watson & Associates Economists Ltd.

Note: Numbers may not add precisely due to rounding

1. Excludes constrained lands

2. Constrained lands include brownfield sites and sites without road access

8.2.2 Intensification Potential of Underutilized Industrial Lands

Intensification Supply

Given the large number of established industrial areas in Kingston, a wide array of opportunities for intensification exists.

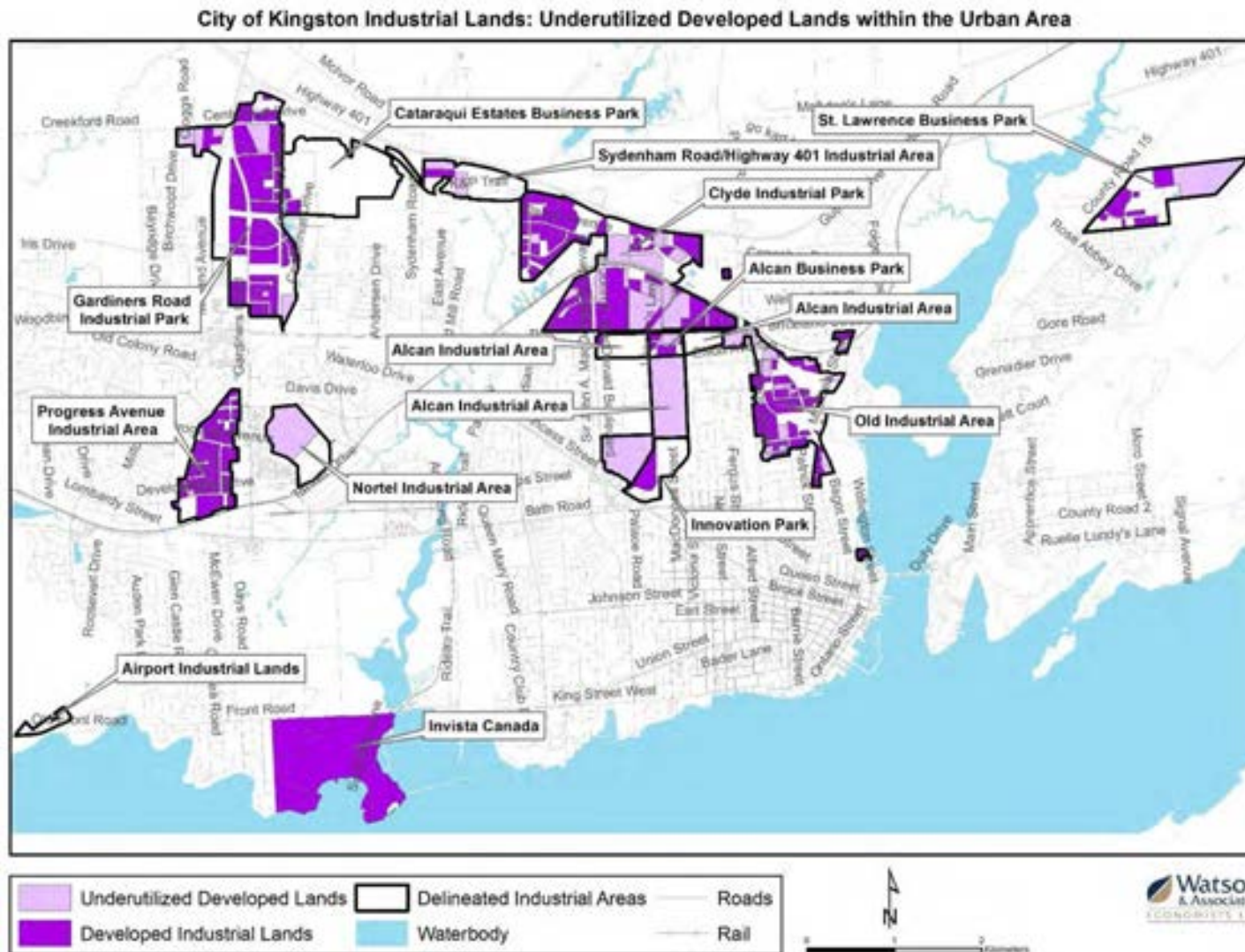
Intensification can take a number of forms, including development of underutilized lots (infill), expansion (horizontal or vertical) of existing buildings and redevelopment of sites. Intensification offers the potential to accommodate future employment growth and achieve improved land utilization resulting in higher employment density in existing industrial areas. Higher land utilization on existing employment lands can also lead to more effective use of existing infrastructure (e.g. roads, water/sewer servicing), a built form that is more conducive to support for public transit, and communities that are more functional and complete.

Through a desktop review using the developed industrial parcel inventory, building footprints and orthophoto overlays, combined with a windshield survey, the Consultant Team identified a total of 144 Ha (356 acres) of developed industrial land within the City which are considered underutilized. This reflects parcels which have:

- a vacant portion (potential for severance or building expansion);
- relatively low building coverage (less than 10%) or sites which are currently used exclusively for storage and/or parking; and
- redevelopment sites which reflect derelict, abandoned or underutilized built sites.

The identified parcels are presented in Figure 8-2.

Figure 8-2



The underutilized parcels account for 21% of the total developed industrial land base in the City. The proportionate share of developed lands that are underutilized by industrial area is presented in Figure 8-3. As shown, the highest share of underutilized lands is located in the City's older industrial areas including the Nortel Industrial Area, Alcan Industrial Area, Clyde Industrial Park and the Old Industrial Area. The Gardiners Road Industrial Area, Sydenham Road/Highway 401 Industrial Area and St. Lawrence Business Park also contain moderate amounts of underutilized land. In contrast, the City's other newer industrial areas have minimal opportunities for intensification.

Figure 8-3
City of Kingston

Underutilized Industrial Lands as a Share of Total Developed Industrial Lands

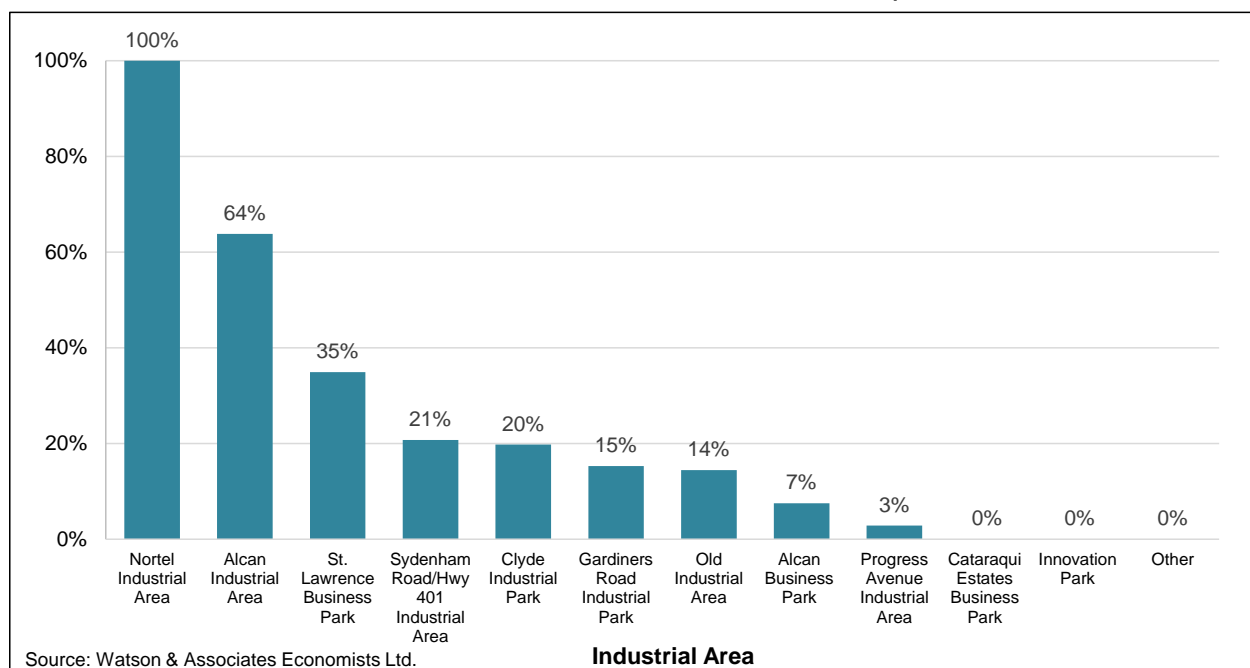
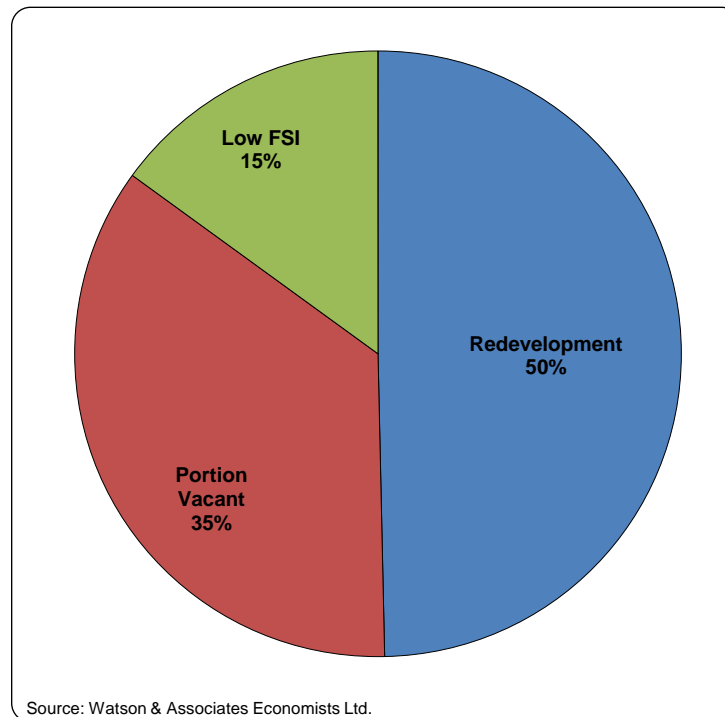


Figure 8-4 summarizes the underutilized lands (expressed in terms of land area) by intensification opportunity type. As shown, half (50%) of the City-wide underutilized lands have been identified as redevelopment opportunities. Lands that have a large vacant portion of land and the potential for severance or building expansion account for 35% of the underutilized lands in the City. In comparison, parcels with a relatively low F.S.I. (less than 10%) or sites which are currently used for storage and/or parking account for 15% of the underutilized lands in Kingston.

These intensification opportunities are discussed in more detail below.

Figure 8-4
City of Kingston
Underutilized Industrial Lands by Type



Vacant Portions of Developed Sites

Opportunities for infill development and building expansion exist within the City's existing industrial areas. This includes a number of developed sites that have the potential for facility expansion within their existing sites. An estimated 51 Ha (126 acres) of vacant land exists within developed sites which could be developed. Key sites include:

- TDL Distribution Centre – includes 12 Ha (30 acres) of undeveloped land which, if not developed within a certain period of time, the City has a right to purchase back. This suggests that these lands will likely be developed over the forecast period, either by TDL or by another party; and
- Novelis site – the parcel is largely utilized by the Novelis manufacturing plant, but the northern portion (approximately 15 Ha) is currently vacant. The long-term plans in terms of the use of these lands is unknown.

Such expansions would significantly increase employment densities and generate higher utilization of occupied industrial lands.

Redevelopment Sites

As illustrated in Figure 8-4, redevelopment sites account for 50% of the underutilized lands in the City's industrial areas. There is an estimated 72 Ha (178 acres) of lands identified for redevelopment. The major redevelopment sites identified include:

- J.S.M. Property;
- Former Nortel site; and
- Creekford Road Area – redevelopment of transportation terminals, construction yards.

The J.S.M. Property and its redevelopment potential are discussed in further detail below, while the redevelopment potential of the former Nortel site is discussed in Chapter 9.

J.S.M. Property

The subject site (725-801 Sir John A. Macdonald and 993 Princess Street) is located on the east side of Sir John A. Macdonald Boulevard, just north of Princess Street. The site, which covers an area of 24 Ha (59 acres), is designated General Industrial.

The subject site is an underutilized developed industrial property, home to the former Alcan South Plant building and numerous other industrial businesses. The former Alcan South Plant building (originally 700,000 sq.ft. in size) was closed in 1979 and has been partially demolished in phases over the past 25 years. The remaining building (200,000 sq.ft.) is occupied in part by a mix of office, recreational and storage/warehousing tenants.

The site is bound by commercial retail development (containing a range of retail and services) to the south along Princess Street, Strathcona Park residential subdivision to the west, Business Park Industrial designated land to the east (Innovation Park) and vacant designated residential land to the north (former Alcan lands).

J.S.M. Corporation, owner of the land since 1989, has indicated that they intend to develop an industrial business park on the site with complementary commercial uses on a small portion of the lands abutting Sir John A. Macdonald Boulevard. They have requested that approximately 75% of the subject site be redesignated from General Industrial to Business Park Industrial and to allow for complementary service commercial uses along the portion of lands abutting Sir John A. Macdonald Boulevard

(representing approximately 25% of site), through a new proposed industrial land use designation (Business Park Service).

It is recognized that the property has limited marketability under its current General Industrial designation. Given the property's size, location, market demand potential for office space and the lack of prestige employment land in Kingston, this study supports the land owner's intentions to redesignate the site from General Industrial to Business Park Industrial. The proposed commercial service uses on the lands abutting Sir John A. Macdonald Boulevard can generally be accommodated under the Business Park Industrial designation, through the provision of complementary uses in accordance with Section 3.6.A.2 of the City's Official Plan, eliminating the need for a separate land use designation.

Parcels with Low Coverage or Utilized for Storage/Parking

The majority of the lands with low building coverage or used for storage/parking are located in the industrial parks with proximity to Highway 401, such as the Clyde Industrial Park and the Gardiners Road Industrial Park. These lands are primarily used for parking and/or storage for construction, landscaping and transportation operations. There are also a number of smaller lots located in the Old Industrial Area and the Progress Avenue Industrial Area that are used for similar purposes. An estimated 22 Ha (54 acres) of land with low coverage and/or utilized for storage/parking which could be intensified have been identified.

Evaluation of Intensification Potential

Identifying and evaluating intensification opportunities against market demand is challenging. The intensification potential of the underutilized industrial lands will largely be determined by future development plans of existing or future landowners which are highly speculative. Over the past decade, expansions/additions have accounted for 3% of development activity (as expressed in G.F.A.) on industrial lands in Kingston. Infill and redevelopment of existing developed lands will occur over time, largely driven by market demand for land development opportunities. As previously identified, Kingston has a significant number of underutilized parcels that hold market potential, which suggests that intensification over the forecast period will be greater than in the past. Based on recent trends in intensification and the likely redevelopment of key intensification opportunities identified, it is anticipated that 10% of Kingston's employment growth on industrial lands over the 2014-2034 period will be accommodated through intensification. This assumption is reflected in the industrial land needs analysis presented in Section 6.

To effectively assess and evaluate intensification potential and opportunities in Kingston, and to ensure that the City can meet the 10% intensification target identified, a comprehensive city-wide industrial lands intensification strategy is recommended, which is beyond the scope of this study. A “stand-alone” industrial lands intensification strategy would involve a site-by-site analysis of potential intensification sites that would include, but not be limited to:

- Assessment of site conditions (e.g. contamination);
- Parcel configuration/size;
- Suitability of building stock for expansion (where applicable);
- Parcel ownership and landowner intentions, future development/expansion;
- Land use zoning, possible restrictions on use, etc.;
- Review of infrastructure (e.g. condition, capacity); and
- The potential for severance of unutilized portions of lots for new development.

The timing and the potential amount of intensification on industrial lands is based on a variety of market-driven conditions. Potential redevelopment or development of sites needs to be evaluated in terms of economic viability and marketability with respect to market demand. This aspect would form a significant component of an industrial lands intensification strategy. As part of the intensification strategy, the City should also explore and identify financial tools/incentives and implementation tools to facilitate intensification initiatives.

8.3 Industrial Areas S.W.O.C. Analysis

As part of this study, Kingston’s industrial areas were reviewed through a S.W.O.C. (strengths, weaknesses, opportunities, challenges) analysis as summarized in Figure 8-5, based in part on the required attributes of industrial/business parks discussed in Section 8.1 and the opportunities to accommodate growth discussed in Section 8.2.

Figure 8-5
Kingston Industrial Areas S.W.O.C. Analysis

Industrial Area	Strengths/Opportunities	Weaknesses/Challenges
Airport Industrial Lands	<ul style="list-style-type: none"> • Opportunities to build synergies with Airport. • Serviced and shovel-ready land available for development on the south side of Airport. • Longer-term industrial development potential on currently Airport-designated lands on north side of Airport. • Proposed Airport expansion would elevate the lands development potential. 	<ul style="list-style-type: none"> • Distance/access to Highway 401. • Relatively small block of industrial land currently available for development limits size potential of park.
Alcan Business Park	<ul style="list-style-type: none"> • Alcan Business Park has seen significant development activity and highly successful at attracting office and “knowledge-based sectors. • Excellent arterial road access via recently upgraded and widened John Counter Boulevard. • Proximity to Highway 401. • Off-site services and amenities nearby (Division Street). 	<ul style="list-style-type: none"> • Relatively small size limits its ability to create “sense of place.” • Limited shovel-ready land available for development.
Alcan Industrial Area	<ul style="list-style-type: none"> • Significant industrial presence through Novelis. • Central City location with excellent arterial access via Sir John A. Macdonald Boulevard and John Counter Boulevard. • Proximity of southern portion of area to neighbouring commercial services (e.g. Kingston Centre). • Significant underutilized lands present a 	<ul style="list-style-type: none"> • Distance of southern portion of area to Highway 401. • Lands in southwest part of area (J.S.M. property) are underutilized.

	redevelopment opportunity.	
Cataraqui Estates Business Park	<ul style="list-style-type: none"> • Collectively with the Gardiners Industrial Area, forms a first-class industrial/business park with a critical mass. • Significant greenfield land supply opportunities including shovel-ready lands with potential to accommodate broad range of sectors. • Proximity and access to Highway 401. • City's newest and most prestige employment area which is highly desirable. • Area has seen strong development activity in past five years. • Northern extension of Centennial Drive to connect to Gardiners Road, expected to be constructed in 2016, will greatly enhance access to Highway 401. 	<ul style="list-style-type: none"> • Direct access to Highway 401 somewhat limited without major arterial connection (i.e. Centennial Drive extension). • Despite its prestige employment feel, most lands are designated General Industrial.
Clyde Industrial Park	<ul style="list-style-type: none"> • Excellent access to Highway 401 via two interchanges at Sir John A. Macdonald Boulevard and Division Street. • West side of park located along major gateway into the City – Sir John A. Macdonald Blvd. • East side of park has access to off-site services and amenities (Division Street corridor). • Recent road improvements to John Counter Boulevard have improved access to area. • Older portion of park is served by rail spur. • A number of underutilized 	<ul style="list-style-type: none"> • Approaching buildout which limits further greenfield development potential. • A number of lower order uses, including transportation and utilities along John Counter Boulevard detract from the area's market potential. • Western part of park has limited access to off-site services and amenities.

	<p>sites along John Counter Boulevard offer potential for redevelopment.</p>	
Gardiners Road Industrial Area	<ul style="list-style-type: none"> • Proximity to Highway 401. • Excellent access to Highway 401 via Gardiners Road. • Located along major “Gateway” into the City – Gardiners Road. • Of sufficient size to have critical mass. • Offers some shovel-ready sites. • Underutilized sites along Creekford Road offer redevelopment opportunities. • Northern part of industrial area has prestige character and has experienced strong development growth in recent years. • On-site and off-site amenities and services in proximity to the Gardiners Road Area. • Access to express transit service. 	<ul style="list-style-type: none"> • Most sites on Gardiners Road have been absorbed. • Gateway to area from north along Gardiners Road has a general industrial character which detracts from its appeal. • Privately owned and not actively marketed for industrial uses.
Innovation Park	<ul style="list-style-type: none"> • Offers unique opportunity for incubator type business development in “knowledge-based” sectors with synergies with Queen’s University. • Has been successful at attracting a range of businesses since it opened in 2008. • Opportunities to expand park through greenfield development. • Expansion area would have sufficient critical mass to support park of this type. • Central location with proximity to complementing 	<ul style="list-style-type: none"> • Caters to a niche market which limits its broader growth potential.

	<p>off-site amenities and services.</p> <ul style="list-style-type: none"> • Access to express transit service. 	
Nortel Industrial Area	<ul style="list-style-type: none"> • Centrally located in proximity to extensive off-site services and amenities. • Good access and exposure to Taylor-Kidd Boulevard – a major east-west arterial. 	<ul style="list-style-type: none"> • Distance from Highway 401. • Portion of site is underutilized brownfield site which has been in current state for a long period of time. • Limited market potential for stand-alone, single-tenant industrial use. • Relatively small land area, lacking critical mass for stand-alone industrial park.
Old Industrial Area	<ul style="list-style-type: none"> • Area is centrally located, close to the downtown core. • Area is served by a number of arterial roadways including Division Street, Montreal Street and John Counter Boulevard. • A number of recent government-related developments along Division Street have greatly enhanced the corridor. • Recent extension of John Counter Boulevard, connecting Division Street to Montreal Street, has enhanced access/circulation to northern portion of industrial area. • Removed C.N. rail yard helps to open up the area for redevelopment. • The northern part of the proposed Wellington Street Extension would expand access to a number of sites currently with no road access and enhance development potential of the area. • 3rd bridge crossing over the Cataraqui River would 	<ul style="list-style-type: none"> • Area is not in proximity to Highway 401. • Limited street network connectivity reduces access/circulation. • The former C.N. rail yard lands divide the area in two, with poor linkages between the two halves. • Duff Street area suffers from substandard property standards and a low character streetscape. • Limited number of marketable vacant industrial land sites which do not have constraints (i.e. brownfields, road access issues). • A significant number of brownfield sites within the industrial area create challenges to revitalize the area. • The built form along the Montreal Street corridor within the Old Industrial Area in derelict condition. • Neighbouring residential uses intrude into industrial area which creates potential land use conflicts.

	<p>improve access to the industrial area.</p> <ul style="list-style-type: none"> • A number of large brownfield sites available for development. 	
Progress Industrial Area	<ul style="list-style-type: none"> • Relatively strong commercial presence and market potential to accommodate “knowledge-based” sectors. • In proximity to Gardiners Road corridor and on-site and off-site complementary services (i.e. restaurants, other services). 	<ul style="list-style-type: none"> • Condition of some older buildings detracts from area. • Approaching buildout with limited development opportunities. • Distance from Highway 401 detracts from marketability for sectors needing transportation access.
St. Lawrence Business Park	<ul style="list-style-type: none"> • Excellent access to Highway 401. • Prestige character which is desirable for prestige employment uses. • Park has seen relatively strong development activity. • Recent development activity in the surrounding area has helped to reduce its isolation and create a more dynamic urban environment. Continued development activity should continue to strengthen the park in the future. • Notable complementary ancillary uses. • Expansion potential to the north. • Planned 3rd crossing of Cataraqui River would enhance access to the area. • Access to express transit service. 	<ul style="list-style-type: none"> • Somewhat isolated location on edge of Urban Boundary east of the Cataraqui River detracts from its market potential.
Sydenham Road Area	<ul style="list-style-type: none"> • Excellent access and proximity to Highway 401 via Sydenham Road 	<ul style="list-style-type: none"> • Unserviced land which is subject to Secondary Plan prior to development. • Limited size.

8.4 Industry Sector Requirements

At both the regional and local levels, location requirements of industry can vary considerably depending on the nature of the employment sector/use. Employment sectors typically situated in industrial areas have varying site-specific requirements. To be successful in attracting key target employment sectors and sectors with strong growth potential, Kingston's industrial areas need to have the corresponding attributes and features, as summarized in Figure 8-6.

Figure 8-6
Employment Sector/Land Use Requirements

Employment Sector/Land Use	Requirements
Advanced Manufacturing	<ul style="list-style-type: none"> • Access to 400 series/controlled access highways. • Access to skilled and unskilled labour. • Proximity to markets and related industries. • Proximity to U.S. • Competitive land prices. • Parcel size: 1-4+ Ha. • Buffers from surrounding non-industrial uses. • General or prestige setting. • Expansion potential.
Distribution and Logistics	<ul style="list-style-type: none"> • Access to 400 series/controlled access highways. • Excellent access/traffic circulation for heavy truck traffic. • Truck access, loading/unloading requirements. • Proximity to markets, U.S. border. • Competitive land prices. • Parcel size: 5-20 Ha. • Flexibility in parcel configuration to accommodate large-scale users. • Possible need for open storage. • Compatible surrounding land uses/buffers from surrounding non-industrial uses. • Expansion potential. • Ceiling height (typically 30 to 50+ ft.). • Access to on-site amenities and proximity to off-site services.
Research and Development/ "Knowledge-based" Sectors	<ul style="list-style-type: none"> • Access to skilled labour force. • Proximity to related industry cluster (companies and public institutions such as universities). • Prestige "campus-like" setting. • Parcel size: 1-2 Ha for stand-alone building or facility

	<p>space within multi-tenant incubator/accelerator type building.</p> <ul style="list-style-type: none"> • Flexible leasing options. • Proximity to transit. • Access to on-site amenities and proximity to off-site services.
Corporate/ Government Office	<ul style="list-style-type: none"> • Prestige setting. • Access to skilled labour force. • Access and exposure to 400 series/limited access highway or major arterials. • Access to on-site amenities and proximity to off-site services. • Parcel size: 1-2 Ha. • Proximity to transit.
Professional, Scientific and Technical Services/Business Services	<ul style="list-style-type: none"> • Access to on-site amenities and proximity to off-site services. • Prestige setting. • Access to skilled labour force. • Flexible leasing structures and market choice (multi-tenant vs. freestanding office, Class A vs. Type B Office Space and multi-tenant industrial condominiums). • Proximity to transit.
Construction	<ul style="list-style-type: none"> • Access to skilled and semi-skilled labour force. • Competitive land prices. • Proximity to customer base. • Market choice in the range of size of development sites. • Need for open storage.

8.5 Assessment of Competitiveness and Investment Readiness of Industrial Areas

Building on the analysis completed in Sections 8.1 through 8.3, the City's industrial areas are assessed herein to better understand their potential to accommodate future industrial land demand and growth within the sectors identified in Section 8.4. This is detailed in the following commentary and summarized in Figure 8-7. Consideration has been given to the following:

- Physical/economic characteristics, which include character of existing industrial base, geographic location, and continuity and delineation of the industrial area;
- Access/circulation, which includes an assessment of the accessibility of each site via road infrastructure and the visibility of the area to major transportation routes;

-
- Development opportunities, including vacant land supply, available lots on the market, parcel configuration and mix, servicing and site expandability; and
 - Target sector attractiveness, including the sectors which the industrial area is best suited to accommodate, and the strength of that area with regard to those sectors.

Qualitative observations are provided and categorized as follows:

- ✓ notes a positive rating of the industrial area with regard to the factor being examined;
- notes a neutral (i.e. neither positive, nor negative) rating of the industrial area with regard to the specific factor; and
- ✗ notes a negative rating for the industrial area with regard to the factor being examined.

Figure 8-7
Kingston's Industrial Areas
Competitiveness and Investment Readiness Analysis

Industrial Area	Physical/Economic Characteristics	Access/Circulation	Development Opportunities	Target Sector Attractiveness
Airport Industrial Lands	<ul style="list-style-type: none"> ✓ Lands located adjacent to regional airport. ✓ Scenic setting with vista views of Lake Ontario. ✗ No existing industrial base. ✗ Designated land package lacks size for stand-alone business park. ✗ Distance to Highway 401. 	<ul style="list-style-type: none"> ✓ Industrial area has good access to Front Road, a two-lane arterial roadway which connects to Bayridge Drive. 	<ul style="list-style-type: none"> ✓ Serviced shovel-ready lands. ✓ Future airport expansion would elevate development potential of area. ✓ Long-term development potential of lands north of airport. ✗ Lot depth of shovel-ready vacant lands limits size of development. ✗ Building height restrictions. - Low density residential uses immediately to south of area requires that future land uses be compatible. 	<ul style="list-style-type: none"> ✓ Potential development for small- to medium-sized airport-related uses.
Alcan Business Park	<ul style="list-style-type: none"> ✓ Prestige setting attractive for office and “knowledge-based” sectors. ✓ Proximity to off-site services/amenities. ✓ Area has seen strong development activity over past five years. ✓ In reasonable proximity to Highway 401. ✗ Small size of park limits “sense 	<ul style="list-style-type: none"> ✓ Excellent access to John Counter Boulevard, a major east-west arterial. ✗ Park has only one access point (to John Counter Boulevard). 	<ul style="list-style-type: none"> ✗ Limited vacant shovel-ready land available for development. 	<ul style="list-style-type: none"> ✓ Attractive for office and “knowledge-based” uses including stand-alone and multi-tenant industrial/commercial.

Industrial Area	Physical/Economic Characteristics	Access/Circulation	Development Opportunities	Target Sector Attractiveness
	of place” and does not have a critical mass.			
Alcan Industrial Area	<ul style="list-style-type: none"> ✓ Central location in City. ✓ Proximity of southern portion to commercial services/amenities. - Large land block but fragmented ownership and configuration. ✗ Park lacks definition. ✗ Southern portion of site not in proximity to Highway 401. 	<ul style="list-style-type: none"> ✓ Excellent access/frontage on two major arterials – Sir John A. Macdonald Boulevard and John Counter Boulevard. ✗ Lack of internal roadways limits circulation within industrial area. 	<ul style="list-style-type: none"> ✓ Vacant lands along John Counter Boulevard are highly marketable for business park development. - Largely developed with a series of underutilized buildings and lands. ✓ Intensification potential of unused portion of Novelis lands to the south and redevelopment of J.S.M. property. 	<ul style="list-style-type: none"> ✓ Vacant lands along John Counter Boulevard highly marketable for prestige employment uses, business services, government services, “knowledge-based” sectors and complementary commercial uses (e.g. hotels). High potential for office and multi-tenant industrial condominiums. ✓ J.S.M. property offers potential for business park and complementary commercial uses. ✗ Redevelopment/intensification potential for general industrial uses limited.
Catarauqui Estates Business Park	<ul style="list-style-type: none"> ✓ Prestige setting offers potential for high-caliber streetscape. ✓ Marketable lands but lack of frontage on a major arterial detracts from full market potential. ✓ Proximity to Highway 401. ✓ Collectively with Gardiners Industrial Area forms a large industrial/ business park of critical mass. 	<ul style="list-style-type: none"> ✗ Though the industrial park is located on an arterial roadway (Centennial Drive), without a northern connection to Gardiners Road, the roadway does not act as a major access point for the area. ✗ Primary access to Highway 401 (currently via Venture Drive) is not ideal. 	<ul style="list-style-type: none"> ✓ Relatively large City-owned shovel-ready land supply. ✓ Broad range of vacant parcel sizes available for development. ✓ Significant expansion potential – sizeable contiguous block of serviceable vacant designated land to the east. 	<ul style="list-style-type: none"> ✓ Well suited for a broad range of uses, including wholesale trade, distribution/logistics, warehousing and manufacturing. ✓ Opportunities for office development along gateway locations, including along Centennial Drive, and multi-tenant industrial condominiums.

Industrial Area	Physical/Economic Characteristics	Access/Circulation	Development Opportunities	Target Sector Attractiveness
	<ul style="list-style-type: none"> ✘ Access/visibility to major arterial roadway is limited at the moment (without northern extension of Centennial Drive). ✓ Construction of Centennial Drive extension in 2016 will greatly enhance access to the park. 			
Clyde Industrial Area	<ul style="list-style-type: none"> ✓ Proximity/access to Highway 401 at two interchanges. ✓ Portion of lands have frontage/visibility on Highway 401. ✓ Rail spur access. ✘ Physical/natural barriers (E.P.A. and C.N. rail line) divided industrial area into two parts. ✘ Park lacks definition and area functions more as four individual parks. ✘ Low order uses along John Counter Boulevard east of Sir John A. Macdonald detract from area. 	<ul style="list-style-type: none"> ✓ Excellent access/frontage on two major arterials – Sir John A. Macdonald Boulevard and John Counter Boulevard. ✓ Good internal circulation except for lands located between John Counter Boulevard and C.N. rail line east of Sir John A. Macdonald Boulevard. 	<ul style="list-style-type: none"> ✓ Underutilized lands along John Counter Boulevard offer long-term redevelopment potential. ✘ Limited supply of shovel-ready sites. ✓ Some potential for expanding serviceable sites in long term. 	<ul style="list-style-type: none"> ✓ Well suited for a broad range of industrial uses, including transportation, warehousing, manufacturing and construction. ✓ Potential office development along gateway location (i.e. Sir John A. Macdonald at Highway 401). ✘ Lack of larger sites limits potential for land expansive uses.
Gardiners Road Industrial Area	<ul style="list-style-type: none"> ✓ Well defined industrial park built to urban design standards. ✓ Large contiguous existing industrial area anchored by major industrial businesses. ✓ Located along major gateway into City – Gardiners Road. ✓ Northern half of industrial area 	<ul style="list-style-type: none"> ✓ Excellent access to Gardiners Road – major arterial roadway. ✓ Good internal circulation. ✓ Access to express transit service. 	<ul style="list-style-type: none"> ✓ Relatively large shovel-ready land supply located along Midland Avenue. ✓ Broad range of vacant parcel sizes available for development. ✓ Redevelopment potential along Creekford Road. 	<ul style="list-style-type: none"> ✓ Well suited for a broad range of uses, including wholesale trade, distribution/logistics, warehousing and manufacturing. ✓ Some opportunities for major office and multi-tenant development along

Industrial Area	Physical/Economic Characteristics	Access/Circulation	Development Opportunities	Target Sector Attractiveness
	<ul style="list-style-type: none"> in proximity and has excellent access to Highway 401. ✓ Gardiners Road fronting parcels have prestige setting. ✓ Lands located along Gardiners Road are highly marketable – park has seen significant development activity. ✓ On-site amenities/services and in proximity to off-site amenities/services. 		<ul style="list-style-type: none"> ✓ Potential to develop Deferred Area, located northwest of Gardiners Road and Creekford Road, for industrial uses. ✗ Limited supply of vacant industrial lands with frontage on Gardiners Road. 	Gardiners Road.
Innovation Park	<ul style="list-style-type: none"> ✓ Established research and technology park affiliated with a major university (Queen's). ✓ Unique development – one of 8 research and technology parks in Ontario. ✓ Central location. ✗ Park limited to two buildings. ✗ Distance of facility from Queen's University main campus. ✗ Limited visibility from arterial roadway (Princess Street). 	<ul style="list-style-type: none"> ✓ In proximity to major arterial roadways (Princess Street, Bath Road and Sir John A. Macdonald Boulevard). ✓ Access to express transit service. ✗ Intersection at Princess Street is not signalized and outbound eastbound turns onto Princess Street are not permitted. 	<ul style="list-style-type: none"> ✗ Existing building is close to capacity with limited leasable space available. ✗ No serviced shovel-ready lands available for stand-alone development. - Greenfield lands provide potential for long-term expansion but no definitive plans for expansion. 	<ul style="list-style-type: none"> ✓ Attractive for “knowledge-based” sectors and government agencies.
Nortel Industrial Area	<ul style="list-style-type: none"> ✓ Central location. ✓ Proximity to off-site services/amenities. ✗ Northern half of area is brownfield site (former manufacturing plant). ✗ Distance and accessibility to Highway 401. 	<ul style="list-style-type: none"> ✓ North half of site has good access/visibility to Taylor-Kidd Boulevard. ✗ Limited internal access/circulation. ✓ Access to rail spur. 	<ul style="list-style-type: none"> ✓ Southern portion of industrial area contains vacant designated lands but it requires servicing, road access. ✗ Northern half of industrial area requires redevelopment of 	<ul style="list-style-type: none"> ✓ Potential for office uses on lands fronting Taylor-Kidd Boulevard. ✗ The industrial area is not attractive for general industrial uses due to the distance to Highway 401 and the industrial area's

Industrial Area	Physical/Economic Characteristics	Access/Circulation	Development Opportunities	Target Sector Attractiveness
			brownfield.	limited size (i.e. lack of critical mass).
Old Industrial Area	<ul style="list-style-type: none"> ✓ Central location. ✓ Recent government-related development has revitalized Division Street corridor. ✓ John Counter Boulevard Extension has improved access to the area. ✓ Removal of C.N. rail yard has opened up area for redevelopment. ✗ Distance and accessibility to Highway 401. ✗ Area has been in a long period of stagnation. ✗ Montreal Street corridor in area is in derelict condition. ✗ Encroaching residential uses raise potential conflicts with industrial uses. 	<ul style="list-style-type: none"> ✓ Good access to the area via John Counter Boulevard, Division Street and Montreal Street. ✗ Area has limited internal street connectivity which reduces circulation. ✓ Northern part of Wellington Street extension would greatly enhance the development potential of a number of vacant parcels in the area 	<ul style="list-style-type: none"> ✓ Official Plan encourages Business Park Industrial along the Division Street and Montreal Street frontages. - Area has a significant number of brownfield redevelopment sites. ✗ Old Industrial Area has a limited number of shovel-ready sites. ✗ A number of vacant parcels have no road access. 	<ul style="list-style-type: none"> ✓ Area has some market potential, along major corridors to accommodate “knowledge-based” sectors.” ✗ Very limited potential for distribution/logistics, transportation or manufacturing.
Progress Avenue Industrial Area	<ul style="list-style-type: none"> ✓ Central location. ✗ Distance to Highway 401. 	<ul style="list-style-type: none"> ✓ Good internal circulation. ✓ Good access to Taylor Kidd Boulevard and Gardiners Road. 	<ul style="list-style-type: none"> ✗ Approaching buildout with limited supply of vacant industrial land. 	<ul style="list-style-type: none"> - Some potential for manufacturing, multi-tenant industrial, construction and non-retail commercial uses.
St. Lawrence Business Park	<ul style="list-style-type: none"> ✓ Prestige employment area. ✓ Well established with strong recent development activity. ✓ Proximity and access to Highway 401. ✗ Park's size doesn't quite meet 	<ul style="list-style-type: none"> ✓ Excellent access to Highway 15 via two intersections. ✓ Excellent internal circulation. ✓ Access to express transit 	<ul style="list-style-type: none"> ✓ Moderate supply of City-owned shovel-ready lands with broad range of vacant parcel sizes available for development. ✗ No expansion potential within existing Urban 	<ul style="list-style-type: none"> ✓ Well suited for a broad range of uses, including distribution/logistics, professional, scientific and technical services, business services and manufacturing.

Industrial Area	Physical/Economic Characteristics	Access/Circulation	Development Opportunities	Target Sector Attractiveness
	<p>the critical mass requirements for a business park.</p> <ul style="list-style-type: none"> - Park is not centrally located in relation to rest of the urban area – continued development in the surrounding area is helping minimize this. 	<p>service.</p>	<p>Boundary.</p> <ul style="list-style-type: none"> ✓ Potential to expand park north of Urban Boundary on lands recently acquired by the City. 	
<p>Sydenham Road/ Highway 401 Industrial Area</p>	<ul style="list-style-type: none"> ✓ Proximity and access to Highway 401. ✗ Limited size of developable area. 	<ul style="list-style-type: none"> ✓ Sydenham Road provides excellent access to Highway 401. ✗ Limited internal access to the area. 	<ul style="list-style-type: none"> ✓ Vacant developable lands provide long term development opportunities. ✗ Area has no shovel-ready industrial lands. 	<ul style="list-style-type: none"> ✓ Well suited for a range of industrial uses, including warehousing, transportation, manufacturing and construction.

Airport Industrial Lands

The Airport Industrial Lands, comprised of 7 net Ha (17 net acres) of shovel-ready land, offer a unique industrial development opportunity. Though the lands have no significant market attributes on their own given their relatively small size and location, their proximity to the Kingston Airport is an asset which enhances their development potential. The concept of an “airport” has evolved from solely a transportation hub to a multi-modal employment centre serving as catalysts for a large range of economic activities. Airports have the potential to generate new business and employment that extends beyond their immediate environs. This includes industrial lands located adjacent or in periphery of major airports.

Industrial lands located in periphery of major airports tend to develop synergy with airport activities, capitalizing on the attractiveness of proximity to air transport connectivity which can enhance business efficiency and optimize business operations. Due to this relationship, the scale and character of the potential development of employment lands are largely correlated to the size and type of direct airport activities, in terms of the number of passengers and amount and type of cargo handled.

The Airport’s current size and operations limit the industrial lands development potential. The City has significant expansion plans for the airport, as discussed in Section 7.3, which would elevate the development potential of the Airport Industrial Lands over the longer term.

As an expanded airport, the Kingston Airport would offer some potential for sectors directly tied to airport activities and operations including air freight distribution/logistics, as well as other office and retail uses. These sectors could be accommodated on the currently designated vacant industrial lands and possibly on lands located north of the Airport. The lands north of the Airport have an area of 33 gross Ha (82 gross acres) and have an Airport land use designation, but have been identified by the Airport Master Plan to potentially accommodate industrial uses over the long term. The lands are accessible via Bayridge Drive and are potentially serviceable. The development potential of the lands north of the Airport for industrial uses is currently very limited but would need to be re-assessed under the context of an expanded airport market analysis.

Alcan Business Park

The Alcan Business Park is a prestige employment area which has demonstrated strong development activity in the past five years. Given the park’s geographic location,

in proximity to Highway 401 with frontage and exposure on a major recently upgraded arterial roadway (John Counter Boulevard), the park has strong market potential for continued development of prestige employment uses, including corporate/government offices and multi-tenant industrial/commercial condominiums. However, the existing park lacks critical mass and has limited shovel-ready lands available for development.

Alcan Industrial Area

Located on a large portion of the former Alcan lands, the area has a number of strengths. It is comprised of a large contiguous block of land located in the centre of Kingston, which has an established industrial base and neighbouring industrial/employment areas (i.e. Alcan Business Park, Innovation Park, Clyde Industrial Area). The area has excellent road access and frontage along two major arterials – John Counter Boulevard and Sir John A. Macdonald Boulevard.

Given its land base size and long industrial history, the area has a diverse land use base which offers both opportunities and challenges. The lands located along John Counter Boulevard are vacant and highly marketable for prestige employment (business park development).

The developed lands which constitute the majority of the industrial area are underutilized, as previously identified, and are designated for general industrial purposes. This includes a portion of the Novelis site which is comprised of vacant land and the J.S.M. property.

The redevelopment and intensification potential of the Alcan Industrial Area for uses suited for general industrial lands is limited. The fragmented nature of the land configuration and ownership prevents the development of a stand-alone general industrial area of critical mass. Further, lands located in the southern half of the industrial area are not in proximity to Highway 401, a critical attribute for many industrial uses. Further, neighbouring lands, including the former Alcan north plant lands which are designated for residential uses, and Innovation Park, a research and innovation park, are not highly compatible with general industrial uses. Given the site's attributes, the underutilized lands would have better market potential for prestige employment/business park uses.

Cataraqui Estates Business Park

The Cataraqui Estates Business Park, the City's newest industrial area, is marketable given its proximity to Highway 401 and its supply of shovel-ready industrial lands. The

area has a prestige character, with an attractive streetscape featuring roadways with curb and gutter, sidewalks, underground utilities and street lighting. The park offers a broad range of parcel sizes and is highly oriented to a mix of prestige employment and industrial uses, including wholesale trade, distribution/logistics, warehousing and manufacturing. It is expected that some of this employment will be accommodated through multi-tenant office and multi-tenant industrial condominium development. The park also has a significant supply of designated vacant industrial lands to the east that are considered serviceable in the medium term.

Access to the industrial area is reasonable but there is no arterial roadway servicing the park which has direct access to Highway 401. The northern extension of Centennial Drive (an arterial roadway), connecting it to Gardiners Road, is required to expand access to the area. The extension of Centennial Drive is slated for construction in 2016. This roadway improvement is expected to significantly improve the market potential of the industrial area.

Clyde Industrial Area

The Clyde Industrial Area is a relatively large industrial area which is divided by an E.P.A. and the main C.N. rail line which dissects the area into three distinct and separate industrial areas. The industrial area has close proximity to Highway 401 and is connected via two interchanges (at Sir John A. Macdonald Boulevard and Division Street). The area is well served by major arterials including Sir John A. Macdonald Boulevard, John Counter Boulevard and Division Street. Although identified as a future arterial road in the Official Plan, Dalton Avenue currently serves as a collector for east-west traffic in the northern half of the park.

Given its proximity to Highway 401, access to a number of arterial roadways and good circulation, the area is highly marketable for a range of general industrial uses, including distribution/logistics, transportation, construction and manufacturing. Gateway locations, including Sir John A. Macdonald Boulevard at Highway 401 offer opportunities for prestige employment uses, including office development.

With the exception of the western portion of the park which was developed largely in the 2000s, the area is one of the City's older industrial areas. The park offers limited shovel-ready land supply opportunities.

Some opportunities for redevelopment along John Counter Boulevard, east of Sir John A. Macdonald Boulevard, are present. The redevelopment potential in this area is likely

long-term, and will depend on the timing and development patterns of the vacant designated lands to the south side of John Counter Boulevard.

Gardiners Road Industrial Area

The Gardiners Road Industrial Area is a large established industrial area with a number of large employers that offers a mix of prestige and general industrial development opportunities. The area is well located geographically to accommodate industrial development and is considered highly marketable given its proximity to Highway 401 and access via Gardiners Road (a gateway to the City). The area has seen significant prestige development activity in the northern half over the past five years.

The area has a significant supply of shovel-ready lands. The area also has a limited number of vacant parcels remaining with frontage on Gardiners Road, with most lands located along Midland Avenue, a parallel arterial road. There are also some longer term opportunities for redevelopment of underutilized sites along Creekford Road. The area is marketable for a broad range of uses, including wholesale trade, distribution/logistics, warehousing and manufacturing. It is expected that there will be continued market demand for prestige employment uses, including office and multi-tenant industrial condominiums, in the north-end of the industrial area.

There is also the potential to develop the Deferred Area (47 Ha), located northwest of Gardiners Road and Creekford Road, for industrial purposes, subject to the completion of a Secondary Plan. This is discussed in further detail in Chapter 11.

Innovation Park

Queen's University Innovation Park is a unique product which is highly marketable for "knowledge-based" sectors oriented towards technology and research. This includes a variety of business types ranging from incubator type "start-up" businesses to medium-sized firms. The park maintains strong synergies with the University which is a key attribute of a park of this nature. Though the park is centrally located and close to off-site services and amenities, it is located some distance from Queen's University. Though the park is in proximity to a number of major arterials, it has limited visibility from Princess Street. Furthermore, the connecting roadway to Princess Street is not signalized and outbound eastbound turns are not permitted which creates some challenges accessing the site. The park currently contains a 220,000 sq.ft. building (former Novelis research building) which is currently 95% leased out with limited space

available for rent.¹ Of this, approximately 120,000 sq.ft. is occupied by Grafoid Inc. (formerly housed Novelis R & D Centre), 30,000 sq.ft. by Queen's University and its various departmental units, 10,000 sq.ft. each for CMC Microsystems and Green Centre Canada. The remaining 50,000 sq.ft. is leased by incubator-type small-scale businesses leasing space up to 3,000 sq.ft. in size.

The park has no shovel-ready land available for businesses wanting stand-alone buildings within the park. The park does have 20 Ha (50 acres) of land available for future expansion. Though Queen's University recognizes the demand potential that warrants expansion, the development of the park independently is outside of its business model and is actively exploring partnership opportunities (e.g. City of Kingston, private developers) to develop the park. The future expansion and timing is unclear and without definitive plans to develop it, it is unlikely that development would occur in the short to medium term.

Nortel Industrial Area

The Nortel Industrial Area, the site of the former Nortel plant, is an underutilized industrial property. The northern portion is a brownfield site which housed the former Nortel plant and has redevelopment potential. The lands to the south are vacant but not serviced. The area is centrally located in proximity to off-site amenities/services (e.g. restaurants, retail shops) and the northern portion has good access/visibility to a major east-west arterial – Taylor-Kidd Boulevard. The Nortel Industrial Area has very limited market potential for general industrial uses due to its distance from Highway 401 and its relatively small size (40 Ha).

Old Industrial Area

As previously mentioned, the Old Industrial Area represents the City's oldest industrial area. Though centrally located, the area offers limited shovel-ready supply opportunities and proximity/access to Highway 401 is a constraint for industrial development.

The area was in a period of relative stagnation for many decades but has seen some redevelopment in the past five years. Significant progress has been made to enhance the Division Street corridor, through the development of a number of government-related facilities. The extension of John Counter Boulevard from Division Street to Montreal Street has improved access in the area and the removal of the C.N. rail yard,

¹ Based on personal communication with Janice Mady Director, Industry Partnerships & Innovation Park, VP Research Portfolio, Queen's University.

which previously split the area in two, has allowed the potential to redevelop a large portion of the central core of the area.

Though the area's employment base has remained relatively stable over the 1990-2014 period, the area has experienced significant shifts in employment by sector.¹ Over the period, the area has seen strong employment growth in public administration and moderate employment increases in construction, retail trade and education services, while it has seen significant declines in employment within manufacturing and wholesale trade. Overall, the employment density in the area has remained stable over the period. Recent development trends suggest that the area has limited potential for industrial uses, with the exception of construction, but does offer some opportunities for serviced-based employment such as "knowledge-based" and office-based sectors.

Despite the redevelopment that has occurred in the area, a number of challenges remain. The area has a significant number of constrained vacant industrial lands. This includes brownfield sites which are proving to be challenging to redevelop. Though the area is well served by major arterials, the internal street network lacks connectivity which makes circulation and access to certain vacant parcels an issue. A number of larger vacant sites also have no road access which prevents their development until the northern part of the Wellington Street extension is completed. The northern part of the Wellington Street extension would provide access to these sites and enhance their development potential.

The area is designated General Industrial, though it is evident that there is limited market potential for industrial uses on these lands. Many parts of the Old Industrial Area remain derelict which also detracts from the area's marketability. This includes the Montreal Street corridor, which has derelict building stock. Other areas, such as the Duff Street area, are in poor condition. In accordance with the City's O.P., Business Park Industrial uses are encouraged along the frontage of Division Street and Montreal Streets within the Old Industrial Area which should support redevelopment efforts along these corridors.

St. Lawrence Business Park

The St. Lawrence Business Park is a prestige employment area which is highly marketable given its proximity to Highway 401 and availability of City-owned shovel-ready lands. The park has accommodated a significant share of the City's industrial

¹ Based on an analysis by Watson & Associates comparing data compiled as part of this study against results from Old Industrial Area Land Use and Strategic Plan, April 1991.

development activity over the past decade. The park is well suited for a broad range of uses, including distribution/logistics, professional, scientific and technical services, business services and manufacturing.

The park's location, which is on the east side of the Great Cataraqui River and not central in relation to the built up area of Kingston, may detract from its appeal for certain users. However, the east side of the Great Cataraqui River has seen significant development activity and as this area continues to develop and mature, the park has become more integrated with the urban fabric of the community. Also, a future third bridge crossing of the Great Cataraqui River would greatly expand access to the area from other parts of the City which would enhance its market potential.

The City owns approximately 36 gross Ha of vacant land, forming a narrow strip along the north side of the park which is outside the Urban Boundary. These lands could accommodate industrial development in the longer term if the Urban Boundary is expanded and an Official Plan Amendment is undertaken to designate these lands for industrial use. This is discussed in further detail in Chapter 11.

Sydenham Road/Highway 401 Industrial Area

The Sydenham Road/Highway 401 Area is an undeveloped industrial area which offers long-term development potential. Given its proximity and visibility to Highway 401, the area could be highly marketable; however, access and servicing constraints impede near-term development opportunities.

8.6 Conclusions

Based on the employment sector requirements identified and the evaluation of Kingston's industrial areas, the following conclusions can be made regarding the potential for the City to accommodate forecast industrial growth:

- The Gardiners Road Industrial Area, Cataraqui Estates Business Park and the St. Lawrence Business Park are the best positioned of Kingston's industrial areas to accommodate a wide range of industrial uses. The parks' supply of shovel-ready lands in proximity to Highway 401, is attractive for a broad range of uses, including distribution/logistics, transportation and manufacturing, while also offering opportunities to accommodate office development and "knowledge-based" sectors and other non-industrial uses.
- Kingston's older industrial areas – the Alcan Industrial Area, Old Industrial Area and Progress Industrial Area, have limited market potential for industrial

development given their distance/access to Highway 401 and limited shovel-ready industrial land supply. The Old Industrial Area does offer longer term potential through a broad number of redevelopment opportunities that may be attractive for business park type development, including office accommodating “knowledge-based” sectors.

- The Nortel Industrial Area is not considered competitive for industrial development but does hold redevelopment potential for other uses.
- Innovation Park offers a unique opportunity to accommodate “knowledge-based” sectors for a range of small- to mid-sized businesses; however, its size and configuration limits its market potential at present.
- Clyde Industrial Area, though well located geographically, is approaching buildout and has limited opportunities for development.
- The Airport Industrial Lands currently have limited industrial development potential but their market potential is anticipated to increase with a future Airport expansion.
- Alcan Business Park is one of Kingston’s best examples of a prestige business park; however, its limited supply of shovel-ready lands restricts its ability to accommodate further development.
- Though there is significant growth potential in sectors that are best accommodated in prestige employment/business parks, Kingston has a lack of shovel-ready lands available to accommodate these uses.
- The City will need to strategically plan for the development of new industrial expansion areas to accommodate the medium- to longer-term industrial land needs. This is discussed in detail in Chapter 11.

9. Proposed Conversion of Designated Industrial Lands

As in many Ontario municipalities, including Kingston, there is increasing pressure to convert designated industrial lands to non-employment uses, namely commercial retail and residential uses. This is often driven by higher demand (and hence higher market values) for commercial and residential development than industrial lands development.

In order to create a healthy local economy, residential, commercial and employment land needs have to be balanced. In recent years, the Province has strengthened planning policy to preserve employment land in the face of conversion pressures. The 2014 P.P.S. ensures the protection of employment land for employment generating purposes.

9.1 Context for Industrial Lands Conversions

This comprehensive review establishes an evaluation framework in accordance with Section 1.3.2 of the P.P.S. and Section 3.6.5 of the City of Kingston O.P. for converting industrial lands to non-employment uses. The review includes designated industrial lands where an active employment conversion application has been submitted to the City or where the property owner has expressed interest to do so. The review also considers select industrial sites where the conversion to a non-employment use may be warranted, from a land-use planning and economic perspective.

9.2 Candidates for Conversion

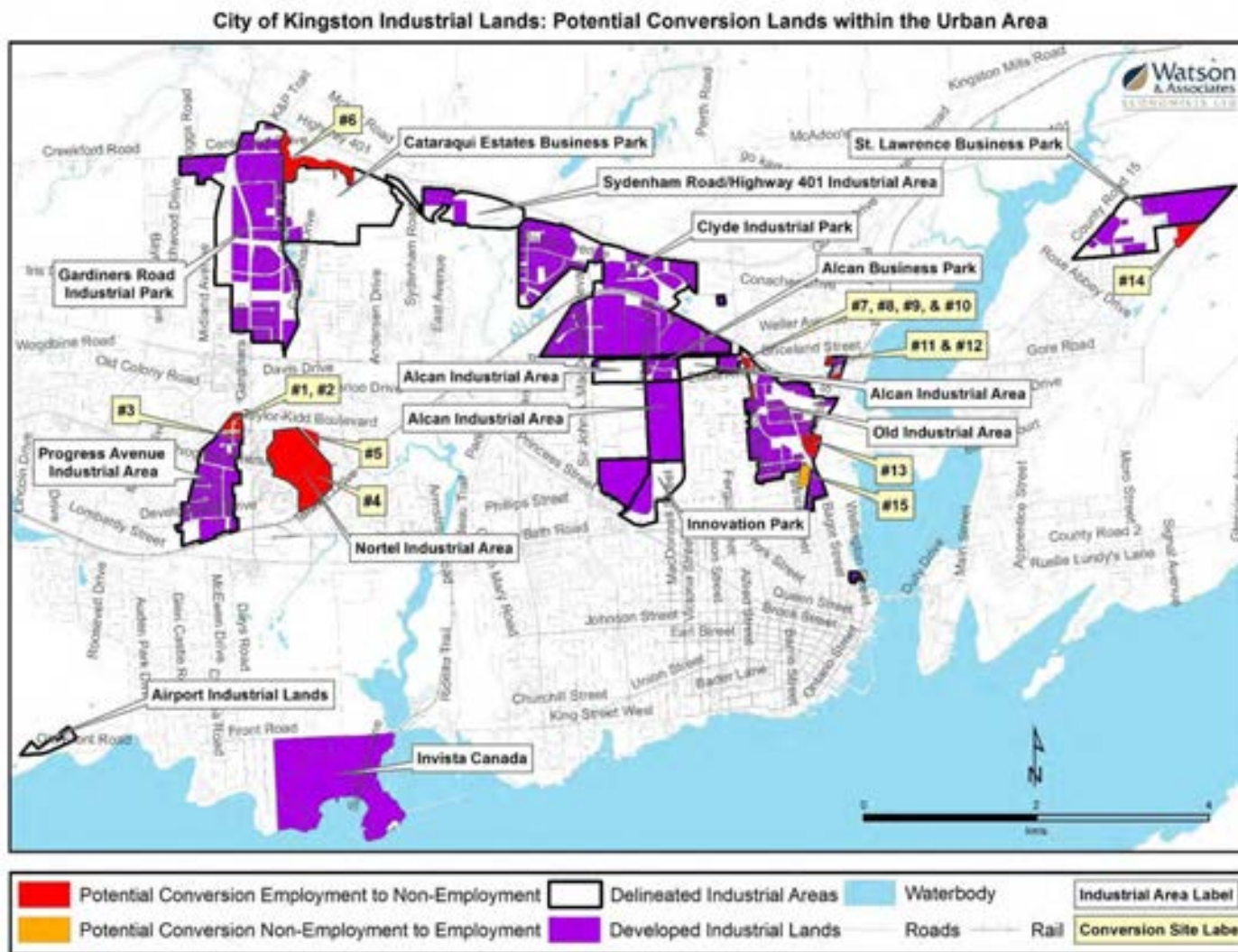
It is recognized that there is a need to preserve Kingston's industrial lands for employment uses. However, it is also recognized that under some circumstances, a conversion may be justified for planning and economic reasons but such decisions must be made using a systematic approach and methodology, as presented herein.

The Consultant Team, in association with the City of Kingston planning staff, reviewed all of the City's developed and vacant industrial lands on a site-by-site basis to determine if potential conversions to non-employment uses are appropriate and justified from a planning and economic perspective. This City-wide review identified 14 sites for potential conversion to non-employment uses.

Based on this City-wide analysis, the following candidates were identified, as referenced on Figure 9-1:

- Site 1. 768-790, 773-775, 800, 805-821 Blackburn Mews;
- Site 2. 810 Blackburn Mews;
- Site 3. 780, 785 Midpark Drive;
- Site 4. 700 Gardiners Road (former Nortel Site);
- Site 5. 495 Taylor-Kidd Boulevard;
- Site 6. Northern Portion of Cataraqui Estates Business Park;
- Site 7. 959 Division Street;
- Site 8. 119 Day Street;
- Site 9. 115 Day Street;
- Site 10. 21, 25, 29, 33, 37, 41, 45, 49 Day Street and 334, 336, 340 Elliott Avenue;
- Site 11. 50, 52, 54, 62, 64, 66, 68, 70, 72, 76, 78,80, 82, 84 Briceland Street;
- Site 12. 681 John Counter Boulevard;
- Site 13. 670 Montreal Street; and
- Site 14. John Machin Sports Field Park.

Figure 9-1



9.3 Evaluation

Each site was subject to an evaluation to assess the merits for conversion based on a broad range of evaluation criteria as outlined below. This discussion also includes the conversion test established under Section 1.3.2.2 of the P.P.S.:

“Planning authorities may permit conversion of lands within employment areas to non-employment uses through a comprehensive review, only where it has been demonstrated that the land is not required for employment purposes over the long term and that there is a need for the conversion.”

Each potential conversion site was reviewed against the following evaluation criteria, developed specifically for this comprehensive review to determine its merits for conversion, including:

- Site is located outside or on the fringe of a designated industrial area;
- Site is surrounded by non-employment land designations on at least three sides;
- Conversion would not create incompatible land uses;
- Conversion of site would not negatively affect industrial lands in the area;
- Conversion would be consistent/supportive of City policy planning objectives;
- Conversion doesn't contravene any City policy planning objectives;
- Site offers limited market choice for industrial lands development due to size, configuration, physical conditions, other; and
- Site does not offer potential future expansion on existing or neighbouring industrial lands.

The results of the analysis are presented in Figure 9-2. Qualitative observations on whether a site meets or does not meet the evaluation criteria are presented as follows:



-  Meets the evaluation criteria; and
-  Does not meet the evaluation criteria.

Figure 9-2
Potential Conversions Evaluation Based on
Comprehensive Review Criteria

Site #	Site Location	MCR Evaluation Criteria							
		A	B	C	D	E	F	G	H
1	768-790, 773-775, 800, 805-821 Blackburn Mews	✗	✓	✓	✓	✓	✓	✓	✓
2	810 Blackburn Mews	✗	✓	✓	✓	✓	✓	✓	✓
3	780, 785 Midpark Drive	✗	✗	✗	✗	✓	✓	✗	✓
4	700 Gardiners Road	✗	✓	✓	✓	✓	✓	✓	✓
5	495 Taylor-Kidd Boulevard	✓	✓	✓	✓	✓	✓	✓	✓
6	Northern Portion of Cataraqui Estates Business Park	✓	✗	✓	✓	✓	✓	✓	✓
7	959 Division Street	✓	✗	✓	✓	✓	✓	✓	✓
8	119 Day Street	✓	✓	✓	✓	✓	✓	✓	✓
9	115 Day Street	✓	✓	✓	✓	✓	✓	✓	✓
10	21, 25, 29, 33, 37, 41, 45, 49 Day Street and 334, 336, 340 Elliott Avenue	✓	✓	✓	✓	✓	✓	✓	✓
11	50, 52, 54, 62, 64, 66, 68, 70, 72, 76, 78, 80, 82, 84 Briceland Street	✓	✓	✓	✓	✓	✓	✓	✓
12	681 John Counter Boulevard	✓	✓	✓	✓	✓	✓	✓	✓
13	670 Montreal Street	✗	✗	✗	✗	✗	✗	✓	✓
14	John Machin Sports Field Park	✗	✓	✓	✓	✓	✓	✓	✓

Criteria

- A Site is located outside or on the fringe of an industrial area.
- B Site is surrounded by non-industrial land designations on at least three sides.
- C Conversion would not create incompatible land uses.
- D Conversion of site will not negatively affect industrial lands in the area.
- E Conversion would be consistent/supportive of City policy planning objectives.
- F Conversion doesn't contravene any City policy planning objectives.
- G Site offers limited market choice for industrial lands development due to size, configuration, physical conditions and other constraints.
- H Site does not offer potential future expansion by neighbouring lands.

The potential conversion sites were also subject to a test of the City's O.P. redesignation of industrial lands evaluation criteria, as identified in Sections 3.6.5a and 3.6.5b of the O.P.

In accordance with the City's O.P. Section 3.6.5a, the following criteria are also considered as part of the assessment of whether the proposed redesignation is appropriate:

- the proposal will not detrimentally affect the short- and long-term employment area land supply of the City, the supply of serviced land, or jeopardize the City's capacity to meet its long-term requirements for areas of employment;
- the intensity, characteristics and impacts associated with the proposed use will not detrimentally impact the viability, desirability, or the proper servicing of existing and future surrounding land uses;
- the site's physical and natural characteristics, development constraints and location will justify the consideration of non-employment uses on the subject lands; and
- redesignation of areas of employment abutting major transportation corridors, including railways, highways and major arterial roads, is discouraged.

Further, in addition to subsection a. above, the proposed redesignation must meet the following conditions (Section 3.6.5b):

- the amount of land affected is minor in area, based on the projected employment area land requirements within the planning horizon of this Plan;
- the development of the subject lands is demonstrated to the satisfaction of Council not to be feasible for employment area uses within the planning horizon of this Plan;
- there are no alternative sites designated and approved for the proposed use elsewhere in the City;
- the proposal will have a beneficial impact on the surrounding uses and broader community; and
- the development of the subject lands for non-employment uses will meet a public need identified by Council resolution.

The results of the analysis are presented in Figure 9-3. Qualitative observations on whether a site meets or does not meet the evaluation criteria are presented as follows:



-  Meets the evaluation criteria; and
-  Does not meet the evaluation criteria.

Figure 9-3

Potential Conversions Evaluation Based on Official Plan Evaluation Criteria

Site #	Site Location	City Official Plan Section 3.6.5a Evaluation Criteria				City Official Plan Section 3.6.5b Evaluation Criteria				
		A	B	C	D	E	F	G	H	I
1	768-790, 773-775, 800, 805-821 Blackburn Mews	✓	✓	✓	✗	✓	✓	NA	✓	✗
2	810 Blackburn Mews	✓	✓	✓	✓	✓	✓	NA	✓	NA
3	780, 785 Midpark Drive	✓	✓	✗	✗	✓	✗	NA	✓	✗
4	700 Gardiners Road	✓	✓	✓	✗	✗	✓	✗	✓	✓
5	495 Taylor-Kidd Boulevard	✓	✓	✓	✗	✓	✓	✗	✓	✗
6	Northern Portion of Cataraqui Estates Business Park	✗	✓	✓	✓	✗	✓	NA	✓	✓
7	959 Division Street	✓	✓	✓	✗	✓	✓	NA	✓	✗
8	119 Day Street	✓	✓	✓	✓	✓	✓	✓	✓	✓
9	115 Day Street	✓	✓	✓	✓	✓	✓	NA	✓	✗
10	21, 25, 29, 33, 37, 41, 45, 49 Day Street and 334, 336, 340 Elliott Avenue	✓	✓	✓	✓	✓	✓	NA	✓	✗
11	50, 52, 54, 62, 64, 66, 68, 70, 72, 76, 78, 80, 82, 84 Briceland Street	✓	✓	✓	✓	✓	✓	NA	✓	✗
12	681 John Counter Boulevard	✓	✓	✓	✗	✓	✓	NA	✗	✗
13	670 Montreal Street	✗	✗	✗	✗	✗	✗	✗	✗	✗
14	John Machin Sports Field Park	✓	✓	✓	✓	✗	✓	NA	✓	✓

Criteria

- A The proposal **will** not detrimentally affect the short and long-term employment area land supply of the City, the supply of serviced land, or jeopardize the City's capacity to meet its long-term requirements for areas of employment.
- B The intensity, characteristics and impacts associated with the proposed use **will** not detrimentally impact the viability, desirability, or the proper servicing of existing and future surrounding land uses.
- C The site's physical and natural characteristics, development constraints, and location **will** justify the consideration of non-employment uses on the subject lands.
- D Redesignation of areas of employment abutting major transportation corridors, including railways, highways and major arterial roads is discouraged.
- E The amount of land affected is minor in area based on the projected employment area land requirements within the planning horizon of this Plan.
- F The development of the subject lands is demonstrated to the satisfaction of Council not to be feasible for employment area uses within the planning horizon of this Plan.
- G There are no alternative sites, designated and approved for the proposed use elsewhere in the City.
- H The proposal **will** have a beneficial impact on the surrounding uses and broader community.
- I The development of the subject lands for non-employment uses **will** meet a public need identified by Council resolution.

These evaluation criteria are discussed in a site-by-site analysis below. Sites meeting a minimum of two-thirds of the criteria (i.e. 12 of the 17 criteria) were recommended for conversion, as summarized in Figure 9-4. For each proposed site conversion, the recommended land-use designation has been provided.

Figure 9-4

Site #	Site Location	Evaluation Criteria Met (17 Criteria Total)	Recommended for Conversion
1	768-790, 773-775, 800, 805-821 Blackburn Mews	13	Yes
2	810 Blackburn Mews	14	Yes
3	780, 785 Midpark Drive	7	No
4	700 Gardiners Road	13	Yes
5	495 Taylor-Kidd Boulevard	14	Yes
6	Northern Portion of Cataraqui Estates Business Park	13	Yes
7	959 Division Street	13	Yes
8	119 Day Street	17	Yes
9	115 Day Street	15	Yes
10	21, 25, 29, 33, 37, 41, 45, 49 Day Street and 334, 336, 340 Elliott Avenue	15	Yes
11	50, 52, 54, 62, 64, 66, 68, 70, 72, 76, 78, 80, 82, 84 Briceland Street	15	Yes
12	681 John Counter Boulevard	13	Yes
13	670 Montreal Street	2	No
14	John Machin Sports Field Park	14	Yes

Site 1: 768-790, 773-775, 800, 805-821 Blackburn Mews

The subject site consists of four developed parcels covering an area of 2.2 net Ha (5 net acres), as illustrated in Figure 9-5. The parcels are designated Business Park Industrial but zoned Commercial (C2-21). The two parcels abutting Taylor-Kidd Boulevard contain neighbourhood commercial plazas, while the other two parcels house professional office complexes (Blackburn Village and Remax Realty). The area is bound by commercial development to the east (Gardiners Road corridor), Business Park Industrial to the south (comprised of Site 3 discussed herein), and the West Branch Little Cataraqui Creek to the west.

Based on its current built form and uses, and the existence of a residential development in its proximity (Site 2 – discussed below), it is recommended that the area be redesignated from Business Park Industrial to Arterial Commercial. The redesignation to Arterial Commercial will help serve as a buffer between the Business Park Industrial to the south and the residential development at 810 Blackburn Mews.

Figure 9-5

**Site 2: 810 Blackburn Mews**

The subject parcel, with an area of 0.6 net Ha (1.5 net acres), is designated Business Park Industrial but is zoned high-density Residential (R5-8) and contains an apartment building which was constructed in 2010. The parcel is bound by Business Park Industrial lands to the south, Arterial Commercial land to the east and north, and E.P.A. land to the west, as illustrated in Figure 9-5.

Given the existing use (residential) and the current zoning and surrounding land uses, it is recommended that the site be redesignated from Business Park Industrial to Arterial Commercial.

810 Blackburn Mews



Site 3: 780, 785 Midpark Drive

The subject site is comprised of two developed parcels abutting Taylor-Kidd Boulevard at Midpark Drive with a combined area of 0.9 net Ha (2.2 net acres), as shown on Figure 9-5. The site contains two low-rise major office buildings which are zoned Commercial (C2-9). The site is within a well-defined employment area (Progress Industrial Area), with Taylor-Kidd acting as an effective boundary to the north. The existing uses (office buildings) are in keeping with the uses permitted within a Business Park Industrial designation. It is recommended that the parcels maintain their Business Park Industrial designation with no conversion recommended. It is also recommended that the site be re-zoned from Commercial to Business Park to be consistent with the O.P. land-use designation.

785 Midpark Drive

**Site 4: 700 Gardiners Road (former Nortel Site)**

The subject site, recently purchased by developer Taggart (Gardiners) Corporation, is located on the south side of Taylor-Kidd Boulevard, bound by the C.N. rail line to the south, RioCan Power Centre (750,000 sq.ft. retail centre) to the west and Waterloo residential subdivision to the east, as illustrated in Figure 9-6. The site, which is designated General Industrial, measures 41 Ha (101 net acres), which includes a developed portion (northern half of site) covering 25 Ha (61 net acres) and a vacant component to the south covering 16 Ha (39 acres). The developed portion of the site is occupied by the vacant former Nortel manufacturing plant (500,000 sq.ft.). A significant portion of the structure was recently demolished by the developer with only a portion of the original building remaining. The remaining structure is currently being rented out. The developed portion of the site represents a significant redevelopment opportunity, as previously identified.

Figure 9-6



700 Gardiners Road



Nortel operated a cable manufacturing facility on the site until its bankruptcy in 1999. Since that time, the building has remained largely vacant and underutilized, having been used for the occasional trade show, and some of the space has been rented out. In contrast, the surrounding area has seen significant development over the past 15 years. The RioCan Power Centre was developed in phases between 1998 and 2007 and included a portion of the former Nortel site. The RioCan Centre has the largest concentration of retail commercial development in Kingston. Lands to the east have been developed for low-density residential

Taggart (Gardiners) Corporation is proposing that the subject site be converted from General Industrial to a Residential/Mixed-use/Commercial designation. The developer proposes commercial development and higher density residential uses to occur in

proximity to Taylor-Kidd Boulevard and the RioCan Power Centre with low-density residential uses to the south and east. The developer plans to submit a formal application for Official Plan Amendment, Zoning By-law Amendment and plan of subdivision in the near-term. The developer has specifically requested this site be considered for conversion as part of this comprehensive review and has submitted supporting documents which were reviewed by the Consultant Team.

The site has limited market potential for redevelopment/development for industrial uses. Though the area is relatively large, it is not part of a broader industrial area and it is considered too small to have the critical mass required for a standalone conventional industrial park. Further, its distance from Highway 401 (4 km) is considered unfavourable for most industrial uses such as manufacturing, distribution/logistics and transportation uses in comparison to other general industrial lands located in proximity to Highway 401. Though the site has potential access to rail, the market demand for such a feature in an urban area is limited.

The Urban Growth Boundary Update (2014) Report identified the Nortel Lands as a special policy area which could potentially accommodate 1,526 residential housing units. While the City has sufficient residential land supply through its vacant greenfield lands and infill/redevelopment opportunities to meet long-term residential land needs, the supply opportunities to meet medium-term demand are more limited, as previously discussed. With other key special policy areas, including the Collins Bay Penitentiary lands and Alcan District lands likely not to develop over the medium term, the need for the Nortel Lands to accommodate residential development over this time period is considered important to maintain sufficient supply and market choice in the residential sector. A residential needs analysis prepared by Malone Given Parsons, which updates the analysis of the Urban Growth Boundary Update (2014), confirms that the City requires a significant share of the subject lands to be utilized for residential uses to achieve its residential lands needs to 2031 including a mix of residential types and near-to mid-term supply.¹ Accordingly, the conversion of the site to permit residential uses is warranted from a land needs perspective. Permitting residential uses on a portion of the site provides the area with the best possible opportunity for successful redevelopment.

A recent study prepared by Malone Given Parsons in support of the conversion request has identified that the subject site can support a moderate level of retail commercial

¹ Analysis presented in letter to City of Kingston Commissioner of Community Services by Malone Given Parsons Ltd., January 27, 2015 – Residential Land Assessment 700 Gardiners Road, Kingston.

development to serve the immediate area.¹ We recognize the potential of the lands within the subject site abutting Taylor-Kidd Boulevard for commercial development. The area offers potential to accommodate the City's growing commercial/retail needs and fills the need for local population servicing commercial retail which is currently lacking in the immediate area.

We recommend that the subject site be redesignated from General Industrial to Residential/Mixed-use/Commercial designation, with the intention that a mix of commercial development and housing typologies be promoted. Both the developed and vacant portions of the site should be approached comprehensively through an overall planning exercise for the lands. Given the size and prominence of the property, the site should be subject to a high quality of design and an innovative mixed-use development plan with respect to density and mix of housing typologies and transit-supportive uses in accordance with the City's O.P. policies.

Site 5: 495 Taylor-Kidd Blvd.

The subject site is vacant property located along Taylor-Kidd Boulevard, covering an area of 1.7 Ha (4 acres), as shown on Figure 9-6. The site is bound by the former Nortel site to the west and south and developed low-density residential lands to the east and north.

The site has a split Residential and General Industrial designation and is zoned Commercial (C2-10-H) which was rezoned in 1982 to permit a church, in addition to the various commercial uses permitted in the C2 zone. It appears that the site was designated Commercial in the previous Official Plan.

Given the surrounding uses (largely non-industrial), zoning, previous designation (Commercial) and the limited market potential for industrial uses, it is recommended that the site be redesignated from Residential/General Industrial to Arterial Commercial.

Site 6: North End of Cataraqui Estates Business Park

The subject lands, covering an area of 13 Ha (32 acres), are currently undeveloped and located at the north end of Cataraqui Estates Business Park, bound generally by Fortune Crescent to the south, Gardiners Road Industrial Area to the west and K. & P. Trail to the north, as illustrated in Figure 9-7. Though designated Business Park

¹ 700 Gardiners Road, Kingston Market Demand and Impact Assessment study, prepared by Malone Given Parsons in September 2014 identified that the site can support 115,000 sq.ft. of retail/commercial development.

Industrial, the lands were zoned E.P.A. and O.S. after the last O.P. was approved and are not available for development. Hence, the lands should be redesignated from Business Park Industrial to E.P.A. and O.S. in accordance with the current zoning.

Figure 9-7



Site 7: 959 Division Street

Located at the southeast corner of Division Street and John Counter Boulevard, as illustrated in Figure 9-8, the subject site has an area of 1 net Ha (2.5 net acres). The north-half of the site is developed and is home to a former bus terminal which has functioned as a private community centre since 2003 (Portuguese Cultural Centre). The south-half of the property is vacant land. The property has a split designation of General Industrial and Residential and a split zoning of Industrial (M1) and Residential (A5) with the developed portion of the site comprising the Industrial designation/zoning. The property abuts Residential (single family residential) to the south, and General Industrial designated lands to the north and west, as shown in Figure 9-9. The land to the west accommodates a transformer station and the parcel to the north is home to a commercial business (tile store).

Given its legacy use, its limited development potential for industrial uses and the neighbouring residential uses to the south, it is recommended that the north-half of the site be redesignated from General Industrial to an Arterial Commercial designation.

959 Division Street



Figure 9-8

**Site 8: 119 Day Street**

The subject site is a small vacant parcel with an area of 0.1 net Ha (0.24 net acres) that is currently designated General Industrial but is zoned Residential (A5). The vacant lot is owned by the City and identified in the O.P. for a future trail. The parcel borders John Counter Boulevard to the north and east, vacant land (Site 7 discussed herein) to the west and Site 9 (General Industrial designated land with residential land use) to the south. The location of the parcel is illustrated in Figure 9-8.

Due to its isolated location from an employment area and its surrounding non-employment uses, the site has very limited potential for industrial development. Based

on the above, including the intended purpose of the parcel, it is recommended that the site be redesignated from General Industrial to Open Space.

Site 9: 115 Day Street

The subject site consists of one parcel which contains one residential dwelling unit that was constructed in 1986, as illustrated in Figure 9-8. Currently designated General Industrial, the parcel is zoned Residential (A5). The property has single-family residential land to the south and southwest, vacant land to the north (including Site 8 discussed herein which is designated General Industrial but intended to be used as a trail in the O.P.) and Site 7 to the northwest which is partially designated Residential, as shown in Figure 9-9. The property borders John Counter Boulevard and the C.N. rail line to the east.

Given the property's existing use, zoning and location, it is recommended that the site be converted from General Industrial to Residential land-use designation.

Site 10: 21, 25, 29, 33, 37, 41, 45, 49 Day Street and 334, 336, 340 Elliott Avenue

With an area of 0.5 net Ha (1.2 net acres), the subject site is comprised of 11 parcels which contain single family residential dwellings that were constructed between 1940 and 1980, as illustrated in Figure 9-8. The lands are currently designated General Industrial but zoned Residential (A5). The lands to the east and south are also designated General Industrial, but the strip of land immediately to the east of the property is the former K. & P. Railway right-of-way (vacant parcel) which is intended in the O.P. for a future trail. The parcel to the south was recently developed and houses the Frontenac Family and Children's Services administration building, an institutional use. Lands to the west and north of the subject site are comprised of single-family residential dwellings.

For all intents and purposes, the subject site is residential in nature and should be redesignated from General Industrial to Residential in accordance with its existing use and zoning.

Residential Properties on Day Street



Site 11: 50, 52, 54, 62, 64, 66, 68, 70, 72, 76, 78, 80, 82, 84 Briceland Street

The subject site (0.5 net Ha) is located on Briceland Street, south of Ford Street, and is comprised of a series of parcels that house a townhouse complex as depicted in Figure 9-9. The site is currently designated as General Industrial but the land was rezoned to a site-specific Multiple Family Dwelling zone in 1993 with dwelling units constructed in 2006. These lands were designated Industrial in the previous O.P. and carried over as General Industrial in the 2010 O.P.

The site is not part of a delineated industrial area, with residential uses to the west and north, a vacant residential designated lot to the south and a designated General Industrial land parcel to the east, occupied by Kingston Regional Hospital Laundry, a commercial laundry service provider.

A redesignation to Residential from General Industrial is recommended given its current zoning, use, location and neighbouring uses.

Briceland Street Townhomes



Figure 9-9



Site 12: 681 John Counter Boulevard

Located at the northwest corner of John Counter Boulevard and Montreal Street, 681 John Counter Boulevard is a developed site measuring 0.6 net Ha (1.5 net acres). The site is designated as General Industrial, though the property was rezoned with a site-specific Arterial Commercial (C2.313) designation in 2000 and amended in 2005 to accommodate the development of a Tim Horton's restaurant in 2006. The parcel was designated Arterial Commercial in the previous Official Plan and the current General Industrial designation appears to be an error in the 2010 Official Plan.

The site is located within a delineated industrial area, bound by commercial land uses to the south and southeast, medium residential (townhouses) to the east and the C.N. rail line to the west and north, as shown in Figure 9-9.

Given its current use, zoning, location and previous O.P. designation, it is recommended that the site be redesignated from General Industrial to an Arterial Commercial designation.

681 John Counter Boulevard

**Site 13: 670 Montreal Street**

The subject site is vacant land designated General Industrial covering an area of 4 Ha (10 acres) located on the west side of Montreal Street, north of Railway Street, as presented on Figure 9-10. The site is bound by commercial use on designated industrial land to the south, residential and industrial designated lands to the north, low-density residential to the east and the proposed Wellington Street extension and vacant industrial land to the west. The site surrounds a small site on the west side of Montreal Street which is designated General Industrial and zoned Industrial, but currently utilized by three residential dwellings.

The site was formerly occupied by K.D. Manufacturing Company which manufactured pictures frames and mouldings until the late 1980s. The building on the site was demolished in 1998; the land has remained vacant since and is a brownfield site.

The property is owned by 1213439 Ontario Inc. who has requested consideration to convert the property to a Commercial and Residential designation, with the intention to develop a commercial block and medium-density residential (townhouses) on the site.

The site is within an established industrial area (Old Industrial Area) with a number of Industrial designated lands surrounding it. There are also concerns about the sanitary sewer capacity in the area and its ability to accommodate more intensive uses (e.g. residential) on the land. There is also concern that introducing residential uses on the site will create land-use compatibility issues and further undermine the integrity of the Old Industrial Area, making the redevelopment of the area more challenging in the long term. However, it is recognized that the site has limited development potential for industrial uses but does offer some opportunities for more service-based land uses such

as “knowledge-based” sectors. The City has identified through Section 3.6.A of the O.P., Business Park Industrial uses along the frontage of Montreal Street.

It is recommended that the lands not be redesignated for Commercial and Residential designation. Instead it is recommended that the site be redesignated from General Industrial to Business Park Industrial.

670 Montreal Street



Figure 9-10



Site 14: John Machin Sports Field Park Expansion Lands

The subject lands, covering an area of 4 Ha (10 acres), are located within the southeast corner of the St. Lawrence Business Park, as shown in Figure 9-11. The site is bordered by the main John Machin Sports Field to the west, TDL Distribution Centre to

the north and an Environmental Protection Area to the east and south. Though designated Business Park Industrial, the lands are occupied by the recently expanded John Machin Sports Field Park. The main John Machin Sports Field Park site to the west of the subject site is currently designated Open Space.

Given the existing use on the site (sports field) and the physical connection to the neighbouring site, collectively forming the John Machin Sports Field Park, it is reasonable that the site also be designated Open Space. As such, it is recommended that the site be redesignated from Business Park Industrial to Open Space.

Figure 9-11



9.4 Sites Recommended for Conversion Based on Evaluation

This evaluation has identified twelve sites for conversion from employment to non-employment use, based on the planning and economic criteria identified above. These sites are listed below and identified in Figure 9-12:

- Site 1 – 768-790, 773-775, 800, 805-821 Blackburn Mews;
- Site 2 – 810 Blackburn Mews;
- Site 4 – 700 Gardiners Road;
- Site 5 – 495 Taylor-Kidd Boulevard;
- Site 6 – Northern portion of Cataraqui Estates Business Park;
- Site 7 – 959 Division Street;
- Site 8 – 119 Day Street;
- Site 9 – 115 Day Street;

Site 10 – 21, 25, 29, 33, 37, 41, 45, 49 Day Street and 334, 336, 340 Elliot Avenue;

Site 11 – 50, 52, 54, 62, 54, 66, 68, 70, 72, 76, 78, 80, 82, 84 Briceland Street;

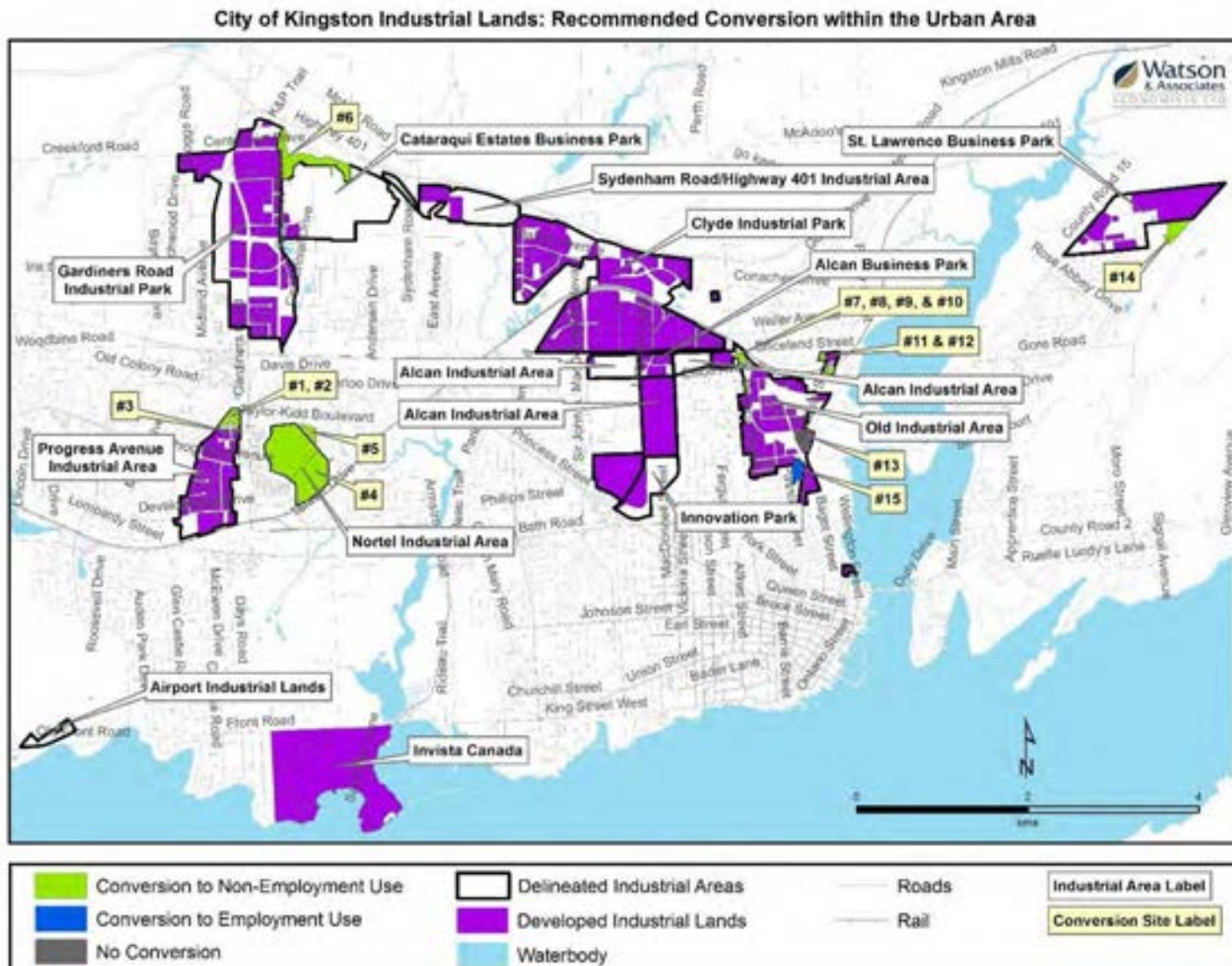
Site 12 – 681 John Counter Boulevard; and

Site 14 – John Machin Sports Field Park.

Though the City of Kingston O.P. does not encourage the conversion of industrial lands to non-employment uses, the above sites recommended for conversion are warranted from a planning and economic perspective. The recommendations are based on established O.P. policy and constitute good planning.

Since Sites 4, 5 and 8 are recommended for conversion to non-employment land use designations, they have been removed from the vacant industrial land inventory, as discussed in Section 9.6.

Figure 9-12



9.5 Potential Conversions to Industrial Designation

As part of this exercise, the Consultant Team also reviewed opportunities for conversion from non-employment to employment uses. The following is the only site that was identified.

Site 15: Former Cohen Property

The subject site, known as the former Cohen property, is located on the west side of Montreal Street between Joseph Street to the south and Railway Street to the north, as shown in Figures 9-1 and 9-12. The site is comprised of six individual parcels and two City street R.O.W.s with a combined land area of 4 Ha (10 acres). The site is a brownfield property which was formerly owned by I. Cohen & Sons which operated a metal fabrication business on the site until 1990. The site is largely vacant with the exception of one residential dwelling located in the northeast corner of the property and one small derelict industrial building which is not occupied. City Council has approved a proposal for purchase by BPE Development Inc. through a tax sale, but the transfer has not been finalized.

The majority of the property (5 of 6 parcels) is currently designated Residential but zoned Industrial and located adjacent to the Old Industrial Area. One parcel (1 Ha) in the northwest corner of the subject site is currently vacant industrial land which is designated General Industrial and within the Old Industrial Area.

BPE Developments is proposing to redevelop the property with 100,000 sq.ft. of commercial office/industrial space comprised of seven buildings ranging in size from 2,500 to 10,000 sq.ft. each. The development is expected to operate as a business centre, designed for innovative small-scale businesses that can pool/share common services. The proposed use would be consistent with Section 3.6.A of the City's O.P., which has identified Business Park Industrial uses along the frontage of Montreal Street. The redevelopment will include an environmental clean-up of the property to accommodate the proposed use and may include funding through the City's Brownfield program. Due to the previous industrial use on the property and the brownfield nature of the site, residential development is likely not a feasible use for the site.

Given its location and the forecast demand for prestige industrial development, it is recommended that the site be redesignated from Residential/General Industrial to Business Park Industrial. Doing so will strengthen the overall Old Industrial Area and the Montreal Street corridor.

Collectively, the redesignation of this site, along with 670 Montreal Street (Site 13), will provide the necessary foundation to revitalize the Montreal Street corridor within the Old Industrial Area.

Figure 9-13



9.6 Industrial Land Supply Adjusted for Conversions

The City's vacant designated industrial lands, adjusted for long-term vacancy, total 215 net Ha (531 net acres), as identified in Chapter 5. Adjusted downward to reflect the recommended conversions of vacant industrial lands, which total 18 Ha (44 acres), and then re-adjusted to include the addition of the former Cohen property (3 Ha or 8 acres) to the industrial land inventory, reduces the net supply of vacant industrial lands to 205 net Ha (506 net acres), as illustrated in Figure 9-14. As such, the recommended conversions would not have a significant impact on the industrial lands supply.

Figure 9-14
City of Kingston Summary of Vacant Industrial Land Inventory
Adjusted for Recommended Conversions

	Net Hectares
Total Gross Vacant	291
Less Sites Recommended for Conversion	18
Addition of Cohen Property to Inventory	3
Total Gross Vacant Adjusted for Conversions	277
Less Internal Infrastructure	31
Total Net Developable Supply of Designated Industrial Lands ¹	245
Less 5% Land Vacancy (Developed and Net Vacant Industrial Lands)	41
Total Net Vacant Industrial Land Supply Adjusted for Conversions and Land Vacancy	205

1. Net Vacant Industrial Lands not adjusted for vacant land adjustment

9.7 Industrial Land Needs Analysis Based on Recommended Conversions

With the adjusted industrial land inventory reflecting recommended conversions, the City of Kingston will still have an adequate supply of industrial lands to meet long-term needs, as summarized in Figure 9-15. As of 2034, a net surplus of 39 Ha (96 acres) has been identified.

Figure 9-15
City of Kingston Industrial Lands Needs, 2014-2034
Adjusted for Conversions

	Net Hectares
Net Industrial Land Demand	166
Net Industrial Land Supply	205
Net Industrial Land Surplus/ (Shortfall)	39

Source: Watson & Associates Economists Ltd.

9.8 Review of City's Official Plan Evaluation of Conversions Framework

While Section 3.6.5 of the City's Official Plan provides a general framework for evaluating conversions of employment to non-employment uses, the framework could be strengthened further to be more comprehensive in terms of the planning and economic criteria considered. As part of the City's O.P. Review, the Consultant Team recommends that Section 3.6.5 of the O.P. be modified to incorporate the following evaluation criteria introduced in Section 9.3 of this study to determine the merits for conversion:

- Site is located outside or on the fringe of a designated industrial area;
- Site is surrounded by non-employment land designations on at least three sides;
- Conversion would not create incompatible land uses;
- Conversion of site would not negatively affect industrial lands in the area;
- Conversion would be consistent/supportive of City policy planning objectives;
- Conversion doesn't contravene any City policy planning objectives;
- Site offers limited market choice for industrial lands development due to size, configuration, physical conditions, other; and
- Site does not offer potential future expansion on existing or neighbouring industrial lands.

On a go-forward basis, the enhanced evaluation framework should be used by the City, in conjunction with the City's O.P., in reviewing applications on both vacant and developed industrial lands where an application has been submitted to the City to convert all, or a portion of, an industrial site to a non-employment use.

10. The City's Future Role in Industrial Land Development

The purpose of this Chapter is to evaluate the future role and approach for the City regarding future industrial land assembly and development.

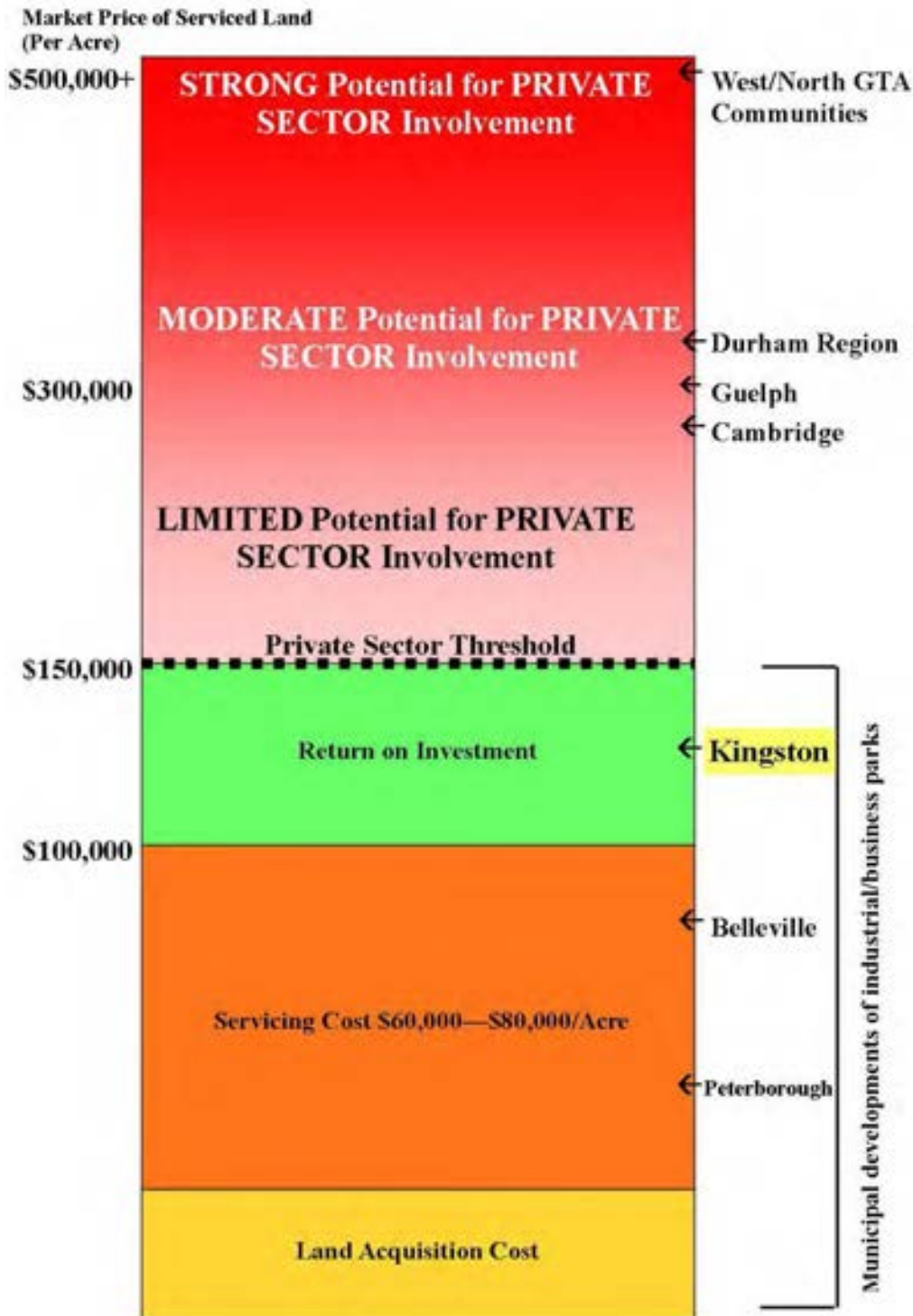
10.1 Municipal Trends in Industrial Land Development

In recent decades, most industrial/business parks in Ontario within municipalities outside of the Greater Toronto Area (G.T.A.) and the Ottawa area have been municipally developed, whereas in the G.T.A. and Ottawa they have been primarily privately developed. Examples of communities which have had active municipal land development include Barrie, Belleville, Brantford, Cornwall, London and Peterborough. Similarly, the City of Kingston has a strong and successful history of municipal industrial land development.

Relatively low land prices and slower rates of development activity in these communities, compared to the G.T.A., create difficulties in attracting and sustaining private sector development of industrial lands. The relatively low market price of serviced land creates conditions that limit private sector interest and involvement in land development (i.e. the costs of servicing lands are too high relative to market prices of serviced land). The absence of the private sector necessitates municipal development of industrial/business parks. Under these circumstances, many municipalities take a pro-active approach and develop municipal industrial/business parks, investing municipal dollars to buy, subdivide and fully service the land. Recouping municipally funded servicing costs (in full or in part) occurs through land sales to end users who then develop the parcels.

Figure 10-1 illustrates the cost components to servicing land, the potential return on investment and the corresponding market price of land required to sustain the private-sector development market. Servicing land is a costly undertaking, typically averaging between \$60,000-\$80,000 per acre. Factoring in the cost of land acquisition (typically between \$20,000 and \$40,000 per acre), the total cost of serviced land can easily exceed \$100,000 per acre. To allow for a minimum return on investment, the market value of serviced land typically has to be in excess of \$150,000. The potential for private-sector development above this point increases with the market value of serviced land.

Figure 10-1



Note: Conceptual structure based on sample survey. Local circumstances may vary.

Most communities in eastern and southwestern Ontario, including Belleville and Peterborough, have serviced land market values well below \$150,000. Though land prices in Kingston are more favourable than in other eastern Ontario markets, industrial land prices in Kingston also fall below the \$150,000 per acre threshold. In contrast, Durham Region (e.g. Pickering, Ajax), Guelph and Cambridge have land market values around \$300,000 per serviced acre, levels that can sustain a moderate degree of private sector development. In comparison, north/west G.T.A. communities, including Mississauga, Brampton and Vaughan, have industrial land prices sufficiently high to support strong and dynamic private-sector development of industrial lands.

The relatively high threshold point for the private sector is driven by the differing cost/benefit methods and expectations regarding return on investment. The private sector typically only includes the revenue of the sale of the serviced land in its return on investment analysis. This is unlike the City which factors in not only the revenue generated from the sale of the serviced land, but also the potential employment, tax assessment and development charge revenue generated from the proposed development. This fundamental difference in approach can have a significant impact in terms of expected return on investment (revenue from sale of serviced land less costs).

10.2 Evaluation of Industrial Land Development Approaches in Kingston

The private sector is not considered sufficiently strong and economically viable to support large-scale employment land development in Kingston. As such, it is expected that the City will need to remain as the primary developer of industrial areas in Kingston. However, industrial land prices have increased to the point where potential public-private partnerships under certain conditions may be possible.

Municipal development offers many advantages for the City. Municipal development of industrial lands tends to provide stronger control over the type and appearance of development that can be more consistent and supportive of a municipal strategy and other planning and urban design policy directions. This includes the ability to be more selective in the sale of land to end users, promoting development of sectors or uses that are considered “desirable.” In Kingston, this may include the development of target sectors and “incubator” industries.

Under municipal development, the control of project phasing/timing can be based on municipal-wide needs as opposed to being market driven and dependent on private sector interests. In addition, City-sold lands require that the purchaser build within a

defined time period, whereas in the private-sector market, no such requirements are in place.

Municipal land development, however, requires extensive financial resources and exposes a municipality to financial and market risk. High up-front land acquisition and development costs are demanding for medium-sized communities such as Kingston.

10.3 Public-Private Partnerships

Public-private partnerships offer the City an alternative with a number of advantages:

- They are an effective mechanism to minimize risk and/or to share the risk with the private sector;
- The City does not need to finance the project entirely on its own;
- Each party has something unique to offer, potentially creating a “win-win” outcome;
- The City of Kingston can take advantage of the private sector’s marketing resources or access to private-sector financing; and
- The private sector can take advantage of municipal clout, which offers a potentially more efficient means of moving through the development approval process.

The key potential disadvantages are:

- Potential conflicting goals and objectives between the two parties; and
- The private market requires a return on investment which, at current market prices, potentially constrains the level of servicing and possibly jeopardizes the ability of the City to develop a prestige employment area to standards it would like to see.

10.4 Conclusions

- The City of Kingston has a strong tradition of successful municipal industrial/business park development;
- Historically, industrial land prices in Kingston, as in other eastern Ontario municipalities, have been too low to facilitate broad private sector development of industrial lands requiring the City to act as a land developer;
- Though industrial land prices are expected to continue to appreciate over time, it is not expected that land prices will reach levels to permit wide-scale private-sector development of industrial lands over the forecast period; and

- From a market demand perspective, the City will likely need to be involved in industrial land development for the foreseeable future, though there may be opportunities to partner with external parties on select projects.

11. Accommodating Forecast Growth on Industrial Lands

As discussed in Chapter 6, Kingston is forecast to absorb an annual average of 8 net Ha (21 net acres) per year between 2014 and 2034. The absorption rate is expected to be strongest in the first half of the forecast period and to gradually decline thereafter. An appropriate phasing schedule for new shovel-ready land supply over the forecast period is vital to accommodate anticipated industrial land demand across a broad range of uses. It is also important that Kingston redevelop a number of its developed but underutilized industrial lands to accommodate a portion of forecast industrial land need. The City needs to also explore longer-term opportunities to accommodate growth on industrial lands beyond the forecast period.

11.1 Accommodating Future Growth within New Industrial Areas

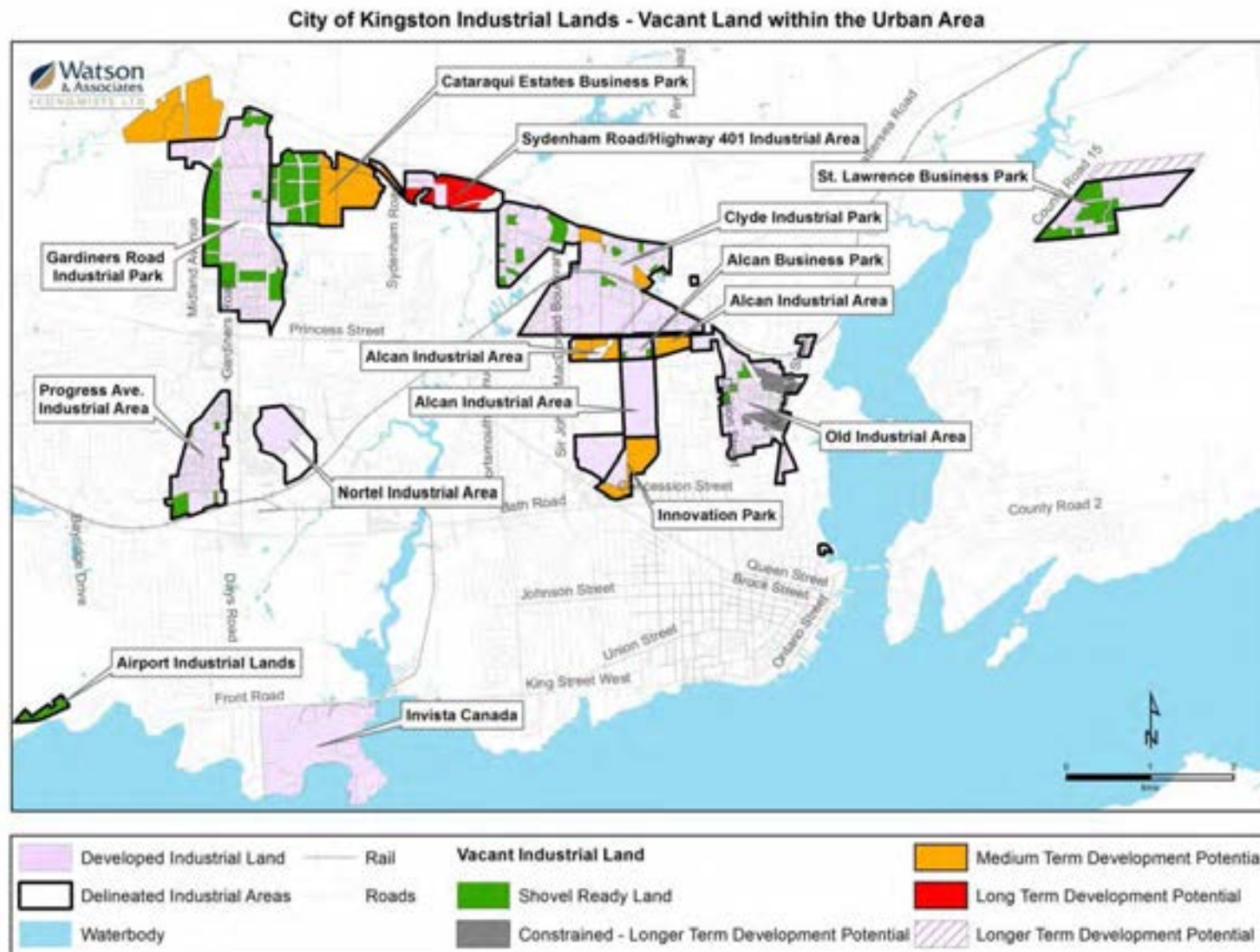
The following provides a recommended phasing schedule for servicing industrial lands and planning for new industrial expansion areas in accordance with forecast demand and the currently available serviced vacant industrial lands. The subject lands are also illustrated in Figure 11-1.

11.1.1 Currently Available Serviced Shovel-ready Supply

Adjusted for the recommended conversions identified in Section 9, Kingston has 135 net Ha (333 net acres) of currently serviced and available vacant industrial land. At the anticipated rate of absorption, Kingston's industrial land supply is expected to be completely absorbed by approximately 2027; however, a few large-scale developments could exhaust this supply in a relatively short time frame. Further, based on recent demand and available supply, the supply of City-owned industrial land is anticipated to be exhausted sooner than privately owned industrial lands.

To ensure that Kingston's industrial land supply is not unduly constrained, it is recommended that the City maintain a minimum 5-year supply of serviced and available lands at all times to allow for adequate market choice within the vacant industrial land inventory. Based on this criterion, Kingston's supply of shovel-ready lands is anticipated to fall below the threshold required to maintain sufficient market choice by approximately 2021.

Figure 11-1



11.1.2 Expansion of Medium-term Land Supply (5-10 years)

It is critical that new serviced industrial lands become available in the medium term (within the next 10 years) to ensure that Kingston has sufficient market choice of industrial lands to meet forecast demand. This includes ensuring that the City maintains a minimum of 30 Ha (74 acres) of shovel-ready City-owned land available for sale. To ensure this, it is recommended that:

- The remaining unserviced designated industrial lands within the Cataraqui Estates Business Park (49 Ha) be serviced by 2021;
- The Deferred Area (47 Ha), located at Gardiners Road and Creekford Road be designated for Industrial use and serviced in the medium term;
- The City should explore development opportunities with Queen's University and other external partners to expand the shovel-ready land supply within Innovation Park.

These additional lands are anticipated to add approximately twelve more years to Kingston's vacant industrial land inventory.

Further discussion with regard to servicing these lands is provided below.

Cataraqui Estates Business Park Expansion

The Cataraqui Estates Business Park contains a significant share of the City's most marketable greenfield vacant industrial land supply opportunities. This includes 49 Ha (121 acres) located east of Centennial Drive which are currently not serviced. Of this, the western half (16 Ha) is City-owned and the eastern half (33 Ha) is privately owned by one land owner. A preliminary concept plan has been prepared for the City-owned lands and the development of a draft plan of subdivision is to follow. The City is working with the land owner to include the privately owned lands as part of the plan of subdivision and to acquire the lands following draft plan approval. It is imperative that the identified planning-related work be completed in the near term.

To service and develop the City-owned and privately owned lands will require new roadways to serve the area. This includes eastward extensions of Resource Road and Venture Drive. This will provide the lands with good access to Highway 401 via the Sydenham Road interchange. A number of roadway improvements are identified for the area which should improve access and circulation within the park by 2019. This includes the extension of Centennial Drive to connect with Gardiners Road in 2016 and the extension of Cataraqui Woods Drive in 2015 to Sydenham Road. The City would

also need to extend water and sewer servicing to the area which will be addressed in the context of the draft plan of subdivision. Though there is sufficient water capacity to service the area, the City would need to complete a downstream sewer capacity study before these lands could be developed.

Given forecast demand for prestige industrial land, it is recommended that the majority of the lands, including those in proximity to Highway 401, be designated Business Park Industrial.

Deferred Area

The Deferred Area, consisting of the Clogg's Road Property and former O.R.C. lands, has a combined area of 47 Ha (116 acres) located at the northwest corner of Gardiners Road and Creekford Road, adjacent to the Gardiners Road Industrial Area.¹ The lands are located within the Urban Boundary and are largely owned by the City but are not currently designated. The lands have strong marketability for prestige employment uses given their locational attributes and would be a logical extension of the Gardiners Road Industrial Area. These lands are subject to the requirements of the Official Plan, including a Secondary Plan, and the appropriate land uses must be determined through a detailed planning review. The City is in the process of initiating the preparation of the required Secondary Plan and supporting studies. It is recommended that the City designate, service and develop the lands for Business Park uses in the medium term. Servicing these lands would strengthen the City's offerings of City-owned supply of prestige industrial shovel-ready lands in the medium term. In order to ensure that the lands are available for development in the medium term, it is recommended that necessary planning approvals be completed in the short term.

Innovation Park

As previously discussed, the Queen's Innovation Park offers strong development potential for the "knowledge-based" sector and creative economy jobs, but it is virtually at capacity with limited potential to accommodate new tenants. It is considered a high priority to expand the park from a one-building facility to a comprehensive research and technology park. It is recommended that the City explore development opportunities with Queen's University and other external partners to expand the shovel-ready land supply within Innovation Park in the near term. This would involve servicing and

¹ Clogg's Road property is comprised of 21 Ha (53 acres) and the former O.R.C. lands comprise 25 Ha (63 acres).

developing the 20 Ha (50 acres) of vacant designated land currently owned by the University located next to the existing park.

11.1.3 Long-term Land Supply (10+ years)

Over the longer term, Kingston will need to ensure that other vacant designated industrial lands are serviced and become developable. It is recommended that:

- The City expand its Urban Boundary to accommodate the Brown property lands immediately north of the St. Lawrence Business Park with the intent of developing these lands over the longer term;
- Develop a secondary plan for the Sydenham Road/Highway 401 Industrial Area and work towards servicing the designated industrial lands over the longer term.

This will ensure that Kingston has sufficient supply of shovel-ready lands to meet forecast demand over the long term. The following provides further discussion on these recommendations.

St. Lawrence Business Park Future Expansion

The City currently owns a parcel of land known as the former Brown Property totalling 36 gross Ha (90 acres) located adjacent to the north side of the St. Lawrence Business Park. Though it is the intent of the City to develop the lands west of Butternut Creek (24 Ha) for industrial uses, the lands are located outside the Urban Boundary.

Given the identified shortfall of prestige and City-owned industrial lands, it is recommended that the City expand its Urban Boundary as part of the 2015 O.P. Review to accommodate this area with the intent of developing these lands over the longer term. It is recommended that these lands be designated as a “Deferred Area” that will be subject to area-specific phasing policies that will require the City to undertake a Secondary Plan or possibly a detailed Concept Plan process in the short to medium term with the intent that these lands be developed for industrial purposes over the longer term. These lands should be considered for Business Park Industrial designation in the O.P.

Sydenham Road/Highway 401 Area

The Sydenham Road/Highway 401 area, located east of Sydenham Road and south of Highway 401, contains 22 Ha (54 acres) of industrial land available for future development. While the lands are well-suited for industrial development, with excellent access and visibility to Highway 401 and buffered from non-residential uses, they

currently have access and servicing limitations. Over the longer term the City should work towards developing these lands for Business Park uses.

There are some concerns with water supply in the area and the Sydenham Road/ Highway 401 area is not currently serviced by sanitary sewer. The ability to develop the area will largely depend on the proposed timing of residential development to the south (Homestead lands) which would assist in providing water/sewer servicing to the industrial lands.

The subject lands are privately owned and the City should explore options to purchase the lands or jointly develop them with the private sector. In accordance with the City's O.P., the Sydenham Road/Highway 401 Industrial Area is to be the subject of a future Secondary Plan, which should be prepared in the medium term. The proximity of residential uses to the south (Homestead lands) also raises potential land use conflicts and land use incompatibility issues which will need to be addressed as part of the Secondary Plan process.

11.2 Redevelopment of Industrial Lands

While it is important to increase the supply of shovel-ready lands in greenfield areas, it is also a high priority for the City to promote intensification and redevelopment within its older industrial areas – namely within the Old Industrial Area and the Alcan Industrial Area. The following recommendations are provided with respect to the redevelopment of Kingston's established industrial areas.

Old Industrial Area

As previously discussed in Section 8, the Old Industrial Area contains a number of constrained vacant industrial parcels. This includes lands totalling 4 Ha (10 acres) which currently have no road access and require the northern part of the Wellington Street extension in order to develop these lands. The northern part of the Wellington Street extension is needed not only to permit access and service to these lands but also to improve the development potential of the broader area. The Wellington Street extension is shown on the schedules of the existing O.P. and in the Development Charges By-law.

The area also has a number of vacant brownfield sites which the City needs to promote and facilitate development, through the use of financial and planning policy tools, to ensure that they are developed over the long term.

The City should recognize that sites with frontage on major arterials including Montreal Street and Division Street have limited marketability for traditional industrial development. In order for these sites to be redeveloped as industrial lands, it is recommended that the City redesignate these lands to a Business Park designation in accordance with Section 3.6.A.7 of the O.P. Further, General Industrial designated lands that are in proximity to sensitive lands uses, such as residential uses, should be considered for redesignated to Business Park Industrial to make them more compatible with these neighbouring land uses and reduce the potential for land-use conflicts. Remaining General Industrial designated lands in the area are best suited for light industrial uses.

As set out in the O.P., a Secondary Plan of the Old Industrial Area is required in order to establish a more detailed planning framework for the area. The City expects to commence the Secondary Plan in 2015. The Secondary Plan will provide detailed policy on matters such as land use, urban form and design, intensification, economic opportunities, transportation, functional servicing and stormwater management. The above recommendations should be considered as part of that study.

Alcan Industrial Area

As previously discussed, the Alcan Industrial Area has a significant developed but underutilized industrial lands base. To maximize their long-term potential, a number of steps need to be taken.

Alcan Business Park South Expansion – The City should explore options to expand the Alcan Business Park to the south over the longer term, which would involve acquiring a portion of the unused lands of the Novelis site (upwards of approximately 15 Ha) for the purpose of business park development.

J.S.M. Property – As previously discussed, the J.S.M. Property is an underutilized industrial property. As discussed in Section 8, the property has limited marketability for general industrial uses but does have strong potential for prestige employment uses given its locational attributes. Under a recommended redesignation to Business Park Industrial, as discussed in Section 8, the City should work with the developer to maximize the developability of the site.

It is recommended that the City prepare a secondary plan for the Alcan Industrial Area.

12. Policy and Zoning Evaluation

12.1 Introduction

Conducting a comprehensive review of Kingston's City-owned and privately owned industrial lands provides a key opportunity to assess the effectiveness of the policies and regulations for employment areas. The following sections provide an evaluation of the City of Kingston's O.P. policies and Zoning By-Law requirements as part of the Industrial Lands Review.

The objective of the evaluation is to answer the following key questions:

- How do Kingston's employment lands planning policies and regulations compare with competing municipalities along the eastern Highway 401 corridor?
- Are Kingston's employment lands planning policies well-aligned to employment lands trends?
- What other policy issues and/or approaches does the City need to address to help support the development of employment lands?

The policy analysis is approached from dual perspectives: Section 12.2 is a comparison of the O.P. policies and zoning requirements of Kingston in relation to other municipalities in eastern Ontario that are located along Highway 401; Section 12.3 examines the City's policies in relation to the evolving trends and specific issues related to employment lands in Kingston. Section 12.4 provides a summary of the recommendations that follow from the analysis.

12.2 Kingston's Policy Competitiveness with Other Highway 401 Municipalities

This section of the report discusses Kingston's "competitiveness" with other eastern Ontario municipalities located on Highway 401 that compete with Kingston for industrial development. The competitiveness analysis is conducted through a comparative review of O.P. policies for employment areas and a comparative review of Zoning By-law requirements for industrial development. The intent of this exercise is to determine how well Kingston's policies and zoning requirements facilitate development relative to its competing peer municipalities, and to identify opportunities to help make Kingston's employment areas more development-ready in terms of land use policy and zoning requirements.

12.2.1 Competitiveness of Official Plan Policies

Kingston's Official Plan policies were compared with the policies from municipalities competing with Kingston along the Highway 401 corridor. The peer municipalities used were Belleville, Napanee, Brockville, and Cornwall.

Napanee's, Belleville's, and Cornwall's Official Plans were written in 2002; therefore, some of their policies may not reflect the current provincial requirements of the Provincial Policy Statement. The fourth municipality, Brockville, updated its O.P. in 2012. Kingston's Official Plan dates to 2010.

Generally speaking, the O.P. policies across these municipalities are fairly similar, and therefore Kingston's O.P. should be considered adequate in terms of its competitiveness with other municipalities. In terms of O.P. policy, Kingston is well-prepared to welcome a wide range of proposed development to its employment areas. Full details of the comparison between the five Official Plans are provided in Appendix D and key observations are provided in the sub-sections below.

12.2.1.1 Planned Function and Land Uses

The Official Plans all provide for a similar planned function and range of land uses, although they vary in terms of specificity and level of detail. Brockville's plan (the newest plan) was the most general, describing employment areas as "clusters of business and economic activity," while Cornwall's plan was fairly specific (i.e., describing manufacturing, warehousing, industrial-commercial malls, and limited business centres and office development). Kingston's O.P. describes the planned function in accordance with the 2014 P.P.S., which is also the approach taken in the Brockville Official Plan.

The land uses permitted across the five Official Plans contemplate similar activities although they are described differently. For example, the Napanee O.P. specifies that a food processing plant would be permitted; while it is not specified in Kingston's O.P., it is anticipated that a food processing plant would be permitted in Kingston under the General Industrial designation as a "processing" operation.

In Kingston, Business Park Industrial is defined separately from General Industrial, with the uses of the Business Park Industrial meant to attract "prestige" office and research uses. This approach is common among the other Official Plans except for Brockville which is broadly permissive and uses policy to address the development of industrial uses that might cause nuisances such as dust, odour, or vibration. Based on

discussions with stakeholders during the E.L.R., the range of land uses differentiated in Kingston's O.P. between the Business Park Industrial and General Industrial land use designations has not been a barrier to development of employment uses and, therefore, no changes to the planned function or primary permitted land use policies appear to be necessary. It is suggested that any boundary issues between the Business Park Industrial and General Industrial land use designations be assessed as part of the 5-year review of the O.P.

12.2.1.2 Development Criteria

The criteria for development include matters such as site plan requirements, lot creation by way of plan of subdivision, site access, landscaping and screening, buffering, lighting, etc. These criteria work together to help ensure that the development on employment lands achieves the municipality's vision for their development and that potential negative impacts to sensitive land uses are minimized/mitigated.

The development criteria in the O.P. address a full range of matters and while some Official Plans are more specific about certain matters than others (likely reflecting the municipality's past experience managing land use conflicts), Kingston's criteria do not appear to be any more or less onerous than any other municipality's. For example, Kingston requires that "the design of new industrial buildings must be compatible with, and sensitive to, the characteristics of the existing surrounding development" and Cornwall requires that "developments have regard for and adhere to good design, location, and performance concerns such as... architecturally designed buildings with attractive exteriors and sensitive selection of exterior materials." Most importantly, all of the municipalities require site plan approval for development in their employment areas.

12.2.1.3 Urban Design

Urban design is a term that refers collectively to site, architectural, landscape, streetscape, and neighbourhood design. Urban design policies in Official Plans and/or urban design guidelines exist in many municipalities to offer further guidance on good development beyond the basics typically addressed by development criteria policies.

The application of urban design does vary between Kingston and the other municipalities. Kingston provides urban design direction for the Business Park Industrial designation, whereas Belleville offers overall guidance not specific to industrial uses, Brockville exercises control through landscaping and the site plan review process, Cornwall has policies applicable to its Service Industrial (light industrial) designation, and Napanee has none.

With respect to competitiveness and the high quality of industrial development demonstrated by recent development in Kingston, the existence of urban design policy is considered an asset to competitiveness rather than a constraint. When investors develop high quality industrial in a community, they expect that neighbouring lands will also be developed to a similar standard and do not want lower class industrial development negatively impacting their investment. Urban design is a key tool in maintaining the cachet of high quality industrial land and is important to Kingston which has planned, developed and promotes its business parks as high quality environments for new businesses.

12.2.1.4 Rural Industrial

The focus of the E.L.R. is on urban, serviced land but this study also considers rural industrial development. This type of development may be characterized by requiring large amounts of space, generating nuisances better suited to occur in a rural area, being incompatible with development in an urban industrial park, and/or being somehow related to the neighbouring agricultural/rural activities; however, it is almost always of a nature that requires very little water and can be adequately serviced through a private well and septic system.

Policies in the Official Plans do vary although they all maintain a central position that rural industrial development must not be a heavy user of water (except for Brockville which has no planned rural area and, therefore, no rural industrial land use designation). Napanee and Belleville do not have a rural industrial designation *per se* but allow rural industrial development in their Hamlets and Agriculture designations (Napanee), and Hamlets and Rural designations (Belleville); Cornwall's land use designation for rural industrial is called "Extensive Industrial." Among the municipalities, Cornwall appears to have the most restrictive policies that limit development to "industrial uses requiring extensive outdoor space for storage... but not engaged in heavy manufacture or assembly" and further anticipates that "such uses shall be grouped wherever possible in special areas where an important consideration shall be screening and buffering from other land uses." Kingston's policies allow for "warehousing, processing, manufacturing, assembling, and outdoor storage, [and] retail and office uses that are clearly an accessory use to the primary Rural Industrial uses." Kingston has a unique policy regarding "eco-industrial" development and this is discussed in another subsection of this report. With respect to encouraging Rural Industrial development, Kingston appears to be on-par with its peers.

Furthermore, based on discussions with stakeholders during the E.L.R., it does not appear that rural industrial development is undermining the viability of Kingston's business parks and, therefore, the policies need no apparent revision.

12.2.2 Competitiveness of Zoning By-law Provisions

The primary purpose of a zoning by-law is to implement the policies of the O.P., regulate development through performance standards and prevent/minimize/mitigate conflicting land uses. Zoning by-laws establish requirements for how land may be used in different areas, as well as where and what types of buildings are permitted, their size and dimensions and a variety of other matters such as parking and landscaping. As a part of Kingston's development readiness, it is important that zoning facilitates the type of development desired and does not create undue hindrances. In terms of competitiveness, it is expected that Kingston's zoning should facilitate development to the same extent as the zoning from competing municipalities. **It should be noted that this type of analysis only serves to highlight similarities and differences in zoning criteria for potential harmonization with peers**, rather than determine whether the zoning standards represent best planning principles, help to promote good design, or contribute to the prestige of an employment area.

Zoning requirements for employment areas in Kingston were compared with zoning requirements from three peer municipalities. The zoning requirements in Kingston selected for this review regulate two of the City-owned business parks in Kingston that have the largest undeveloped areas, the Cataraqui Estates Business Park and the St. Lawrence Business Park.

A total of five zoning categories from Kingston were reviewed, as follows:

- Township of Kingston Restricted Area By-law: Zoning By-law No. 76-26 (Cataraqui Estates Business Park):
 - Business Park (BP-2)
 - Restricted General Industrial Zone – Special (M6-23)
 - General Industrial Zone – Special (M1-12)
 - General Industrial Zone – Special (M1-13)
- Township of Pittsburgh Zoning By-law Number 32-74 (St. Lawrence Business Park):
 - Business Park Zone (BP-1)

The zoning by-laws from the three competing peer municipalities of Cornwall, Napanee and Brockville were examined. Belleville was not included because its zoning by-law

has not been digitized. The zoning by-laws for Napanee and Brockville have been recently consolidated and updated (Brockville in 2014 and Napanee in 2012). The specific zones from the peer municipalities selected for this review regulate land use in an employment area where a significant amount of vacant industrial land is available.

Full details of the comparison matrix between the zoning regulations are provided in Appendix E and Appendix F. The zoning provisions have been summarized with resulting discussion and recommendations in Figure 12-1.

Figure 12-1: Zoning Comparison Summary

Zoning Provision	Kingston	Peer Municipalities	Discussion and Recommendations
Permitted Uses (see Appendix E)	Permitted uses are specific and reflect the differentiation between Business Park and General Industrial from the Official Plan.	Peer municipalities have permitted land uses specific to the approach used in their Official Plan.	While there are differences in nomenclature, it appears that Kingston and its peers generally allow for all the same land uses. The obvious difference is that Kingston operates with five zoning by-laws whereas the peers all have comprehensive zoning by-laws.
Accessory Retail Use	Permitted in 3 of 5 categories.	Permitted in 3 of 5.	The provisions in Kingston are comparable to those of peers.
Outdoor storage	Permitted in 4 of 5 zones. Where specified, range of 15-35% of lot area.	Permitted in 4 of 5 zones (not permitted in Cornwall MFR 20). Where specified, range 15-35% of lot area.	The provisions in Kingston are comparable to peers.
Lot Size and Coverage			
Minimum Lot Size	Requirements in 2 of 5 zones; 550 m ² and 2000 m ² .	Requirements in 4 of 5 comparators; ranges from 375 m ² to 8000 m ² .	Kingston's requirement of 2000 m ² (No. 76-26, M6-23 Zone) is comparable to some provisions from Cornwall and Napanee. The provisions for the other 4 Kingston zones are generally more permissive than peers.

Zoning Provision	Kingston	Peer Municipalities	Discussion and Recommendations
Minimum Lot Frontage	Ranges from 21 to 30.48 m.	No requirement in Cornwall MFR 20. 15 m required in Brockville, one requirement for 61 m in Cornwall. Other comparators cluster at 30 m.	The provisions in Kingston are comparable to those of peers.
Lot Coverage (maximum)	70% in M1-12 and M1-13, 60% in other zones.	No requirements in Cornwall or Brockville. 50% maximum in Napanee.	Provisions in Kingston are more permissive than Napanee, but less permissive than Brockville and Cornwall. With setback, yard, parking and landscaped open space requirements, a maximum lot coverage requirement may be redundant. Consider removing or increasing the maximum lot coverage requirement.¹
Yards and Height			
Front Yard	15 m in M6-23, 8 m in Pittsburgh. All others are 10 m.	9 m in Brockville, 6 m in Napanee BP. Other comparators require 15 m.	The provisions in Kingston are comparable to those of peers.
Exterior Side Yard	15 m in M6-23, 8 m in Pittsburgh. All others are 10 m.	15 m in Cornwall MFR-20, 12 m in Napanee M1. Other comparators are 6 m.	Provisions in Kingston are slightly more restrictive than peers. Consider lowering the exterior side yard requirement to 6 m in some or all zones.

¹ With respect to establishing a *minimum* lot coverage requirement to promote intensification in the industrial areas, Kingston is advised to not do this because it adds complexity to developing a site, whereas the municipality is aiming to reduce complexity and facilitate development.

Zoning Provision	Kingston	Peer Municipalities	Discussion and Recommendations
Interior Side Yard	7.5 m in BP-2, 6 m in Pittsburgh, 3 m in other zones.	15 m in Cornwall MFR 20, 3 m in Napanee BP, all others are 6 m.	The provisions in Kingston are comparable or more permissive than those of peers.
Rear Yard	Range from 7.5-8 m.	6 m in Cornwall M.F.R.-40 and Brockville. 10 m in Napanee BP. 15 m in Cornwall MFR 20 and Napanee M1.	The provisions in Kingston are comparable or more permissive than those of peers.
Yard requirements for lots abutting or across the street from a non-industrial zone	Requirement for a landscape strip in BP-2, rear yard setback of 15 m in Pittsburgh.	Deeper yards required in Cornwall MFR 20 (52.5 m), and Napanee (20 m).	The provisions in Kingston are comparable or more permissive than those of peers.
Maximum building height	18 m to 20 m in By-law No. 76-26; 12 m in By-law No. 32-74.	27.5 m in Cornwall, 15 m to 30 m in Brockville, 12 m to 15 m in Napanee.	Provisions vary significantly. Consider increasing the maximum building height allowance to 30 m.
Parking & Loading			
# Parking spaces for Manufacturing and Warehousing	1 space/100 m ² in M6-23 and M1-13. 1.5 in Pittsburgh, and 1.66-2.69 in BP and M1-12.	Cornwall: between 0.5 and 1 space/100 m ² , Brockville: between 0.5 and 1 space/100 m ² , Napanee: 2.6 spaces/100 m ² .	Requirements in Napanee are significantly higher than Cornwall and Brockville. Requirements in Kingston vary with some being comparable, and some being high. Consider reducing parking space requirements for manufacturing and warehousing uses to reflect the low employees-per-hectare density of these land uses.

Zoning Provision	Kingston	Peer Municipalities	Discussion and Recommendations
# Parking spaces for Office uses	1 space/100 m ² in M6-23 zone, 3.2 to 3.5 spaces/100 m ² for others.	Cornwall: 2.0 to 3.6 spaces/100 m ² (though office uses not generally permitted in industrial areas), Brockville: 2.0 to 3.5 spaces/100 m ² , Napanee: 3.5/100 m ² .	The provisions in Kingston are comparable to those of peers.
Number of Barrier Free Spaces	Approx. 1 space/50 spaces required.	Approx. 1 space/50 spaces required, except Napanee: 1/100 spaces.	The provisions in Kingston are comparable to those of peers.
Location of Parking Spaces			
Permitted in which yards?	All.	Cornwall: All Brockville: Interior side and rear yards Napanee: Interior side and rear yards – visitor in front yard OK	The provisions in Kingston are comparable or more permissive than those of peers.
Setbacks/Screening (with landscaping)	10 m setback from street line and screening required in BP, 7.6 m setback in M1-13, screening required in Pittsburgh.	Cornwall: Screening required, Napanee: 3 m setback required abutting other zones.	The provisions in Kingston are slightly more restrictive than those of peers. Consider reducing the parking area setback requirement to 3 m.
Access to parking spaces	One-way 3 or 3.5-9 m, Two-way 6-13.5 m	One-way 3 or 3.5-9 m, Two-way 6 m min., or 6-9 m range.	The provisions in Kingston are comparable to those of peers.

Zoning Provision	Kingston	Peer Municipalities	Discussion and Recommendations
Surface treatment requirements	Paving required in 3 of 5 zones.	Paving required in Brockville and Cornwall but not Napanee.	The provisions in Kingston are comparable to those of peers.
Loading			
Dimensions of loading spaces	9 m X 3.5 m, 4 m clearance	9 m to 10.7 m X 3.5 m to 3.7 m, clearance: 4 m to 4.3 m	The provisions in Kingston are comparable to those of peers.
Number of Loading Spaces			
0 spaces	No	Cornwall: <200 m ² , Brockville: <420 m ² , Napanee: No	The provisions in Kingston are more restrictive than peers.
1 space	<280 m ²	Cornwall: <2800 m ² , Brockville: <2300 m ² , Napanee: <1000 m ²	The provisions in Kingston are more restrictive than peers. Consider increasing the threshold where only one loading space is required.
2 spaces	<2300 m ²	Cornwall: <5600 m ² , Brockville: >2300 m ² , Napanee: <4000 m ²	The provisions in Kingston are more restrictive than peers. Consider increasing the threshold where only two loading spaces are required.
3 spaces	<7400 m ²	Cornwall: <8400 m ² , Brockville: No, Napanee: <8000 m ²	The provisions in Kingston are slightly more restrictive than peers.
Location of Loading Spaces			

Zoning Provision	Kingston	Peer Municipalities	Discussion and Recommendations
Permitted in which yards?	Exterior side yard and rear yard in M1-13, All yards in Pittsburgh. Interior side yard and rear yard for others.	Cornwall: Not in front yard or adjoining a street, Brockville: Interior side and rear yards, Napanee: Interior side and rear yards.	The provisions in Kingston are comparable to peers.
Setbacks/Screening (with landscaping)	18.3 m setback from street line in By-Law No. 76-26. None in Pittsburgh.	Cornwall: Screening required, Napanee: Front yard loading permitted with 15 m setback.	The provisions in Kingston are slightly more restrictive than those of peers. Consider reducing loading space setback requirements and also consider adding screening requirements.
Access to loading spaces (minimum)	One-way: 3.5 m Two-way: 6 m	One-way: 3.7 m to 6 m Two-way: 6 m	The provisions in Kingston are comparable to peers.
Surface treatment requirements	Paving required in 2 of 5 zones.	Paving required in Brockville only.	The provisions in Kingston are comparable to peers.
Landscaped Open Space			
Minimum landscaped open space	20% in BP, 10% in others.	Cornwall: none required in MFR 20, in MFR 40 requires that unused front and side yard be landscaped. Brockville: 15%, Napanee: 10%.	The provisions in Kingston are comparable or slightly more restrictive than peers. Consider a slight reduction in required landscaped open space to 15%.

Zoning Provision	Kingston	Peer Municipalities	Discussion and Recommendations
Landscaped strip requirements / widths	Landscaping strips required in BP, and Pittsburgh: 8 m to 15 m wide.	3 m landscaping strips required in Cornwall MFR 20 (front yard), and in Brockville if adjacent to residential.	The provisions in Kingston are more restrictive than those of peers in 2 of 5 zones. Consider a reduction in the required width of landscaping strips to 3 m.

12.2.2.1 Zoning Comparison Observations and Summary

Overall, the zoning requirements in Kingston for the St. Lawrence and Cataraqui Estates Business Parks are fairly comparable to the zoning requirements in the peer municipalities. In terms of zoning, Kingston is well-prepared to welcome a wide range of proposed development to these employment areas. While staff indicate that there have been few variance requests for development in the business parks, this reflects the limited amount of recent development in the business parks rather than demonstrates the effectiveness of the performance standards in the zoning.

It is acknowledged by all stakeholders that the current approach to zoning in Kingston, with numerous by-laws and regulations that vary between the by-laws, is cumbersome. A consolidated, comprehensive zoning by-law is long overdue, and the harmonization and consolidation of zoning for the employment land uses should be prioritized (it is recognized that the municipality will soon be starting work on a new comprehensive zoning by-law).

While the work on the comprehensive zoning by-law will ultimately determine the new zoning categories for employment lands, Kingston should recognize that the permission for outdoor industrial activities and/or outdoor storage are an important differentiator between light and general industrial uses within an urban area. At this early stage, it appears that a handful of zoning categories might suit Kingston's needs for the future while still facilitating a wide range of evolving land uses and effectively managing impacts to adjacent sensitive/non-industrial uses.

The following is a summary of the specific recommendations from the comparative review:

- Consider removing or increasing the maximum lot coverage requirement;
- Consider lowering the exterior side yard requirement to 6 m in some or all zones;
- Consider increasing the maximum building height allowance to 30 m;
- Consider reducing parking space requirements for manufacturing and warehousing uses to reflect the low employees-per-hectare density of these land uses;
- Consider reducing the parking area setback (from lot line) requirement to 3 m;
- Consider increasing the threshold where only one loading space is required;
- Consider increasing the threshold where only two loading spaces are required;
- Consider reducing loading space setback requirements and also consider adding screening requirements;

- Consider a slight reduction in required landscaped open space to 15%; and,
- Consider a reduction in the required width of landscaping strips to 3 m.

Modern industrial development tends to favour large sites so that businesses have room to expand later on but this means that small sites remain on the market for a long time before they are sold/developed. The challenge is further exacerbated for small sites simply because they are small and space-constrained. This issue does not arise through a comparative review of zoning but is common to all municipalities. An innovative approach to zoning these small, space-constrained sites that allows for a greater intensity of use within the same acreage of land could be explored. It is recommended that a zoning approach to help small, space-constrained industrial sites develop at higher intensity be explored during the Comprehensive Zoning By-law project.

12.3 Trends and Specific Issues: Policy Analysis and Discussion

This section of the report discusses trends related to the planning of employment lands and specific issues that have emerged during the course of the E.L.R. In terms of a broad trend, the change in the structure of the Ontario economy from manufacturing to goods movement and services is significant. Now, employment areas contain more warehouse and logistics operations and fewer manufacturing uses than they did in the past. Official plans and zoning by-laws across Ontario – including Kingston – have historically permitted a wide range of land uses so, although there have been economic shifts, the O.P. and zoning have not been a hindrance to the development of goods movement and service-type land uses.

As previously identified in this report, there is a trend to transform employment areas from automobile-oriented industrial development with few amenities for employees to vibrant places of work. There are a variety of specific planning issues with Kingston's employment lands that need to be remedied. There is also constant pressure to convert employment lands to non-employment uses and greater guidance is needed in this regard. These matters are discussed in the subsections below.

12.3.1 Best Practice: Improving the Environment for Employees

Recognizing the recent structural changes in the regional economy, there has been a shift in planning philosophy that calls for developing employment areas to provide a wider range of service uses and amenities for employees than before. This is an extension of a broader planning trend towards compact mixed-use development that encourages people to work, shop and recreate near where they live. This concept is

important to the vibrancy of both general industrial areas and business parks since employees in all types of workplaces should have equitable access to services and amenities that support good quality of life at work.

For the planning of employment areas, this means that locations need to be identified where services/amenities such as restaurants, personal services, medical offices and fitness centres can cluster together. The planning and development of these services/amenities in conjunction with the primary employment land uses helps improve the quality of life for employees by offering them access to services/amenities before or after work, or over lunch. In concert with this approach is the design of employment areas to be more pedestrian-, bicycle- and transit-friendly such that employees can easily access services/amenities which helps to reduce the number and duration of trips via private automobile.

The inclusion of service commercial and employment supportive uses relates to the desire to create a more complete business park or industrial area, as well as to address transitional uses between industrial uses and adjacent areas. Though these uses are typically not land extensive, their inclusion in industrial areas could draw clientele from beyond the local area – particularly for services like healthcare, government, educational institutions or restaurants/drinking places – which could create unintended conflicts within the industrial area/business park.

Accordingly, there is a balance needed in the accommodation of employment supportive uses on industrial lands, given the potential impacts these uses may have on the City, including:

- Erosion of the finite supply of industrial lands, meant to accommodate high-value and export-oriented industrial and knowledge-based uses;
- Fragmentation of the existing industrial land supply;
- Land use conflicts or compatibility issues in the industrial areas (e.g. traffic congestion, safety, parking or off-site nuisances); and
- Unintended competition against commercial areas (e.g. rather than locating in a main street area where it could contribute to revitalization, a restaurant opts to locate on a greenfield site in a business park).

Kingston's Official Plan already sets thresholds on the size and range of employment-supportive uses, so the risk of these uses undermining the character of the employment area and rendering adjacent vacant industrial lands vulnerable to conversion is low (see further discussion in Section 12.3.3 in this regard).

Nevertheless, planning policies must strike a balance between maintaining industrial lands for core industrial and business park generating uses, while also allowing the industrial area to develop into a viable and competitive place of work. With this in mind, the intention of employment-supportive uses in industrial areas should be to serve the needs of employees within the industrial area itself as opposed to the broader population.

Kingston's O.P. policies permit the land uses related to this trend but do not articulate the underlying philosophy. Currently Section 3.6 states the following goal for employment lands:

“To support a strong and diversified economic base within the City, allowing for an expansion of the assessment base and providing a choice of jobs for its citizens while supporting the existing infrastructure networks.”

It is recommended that Kingston **consider incorporating the philosophy of employee quality of life into Official Plan policies**. Further wording could be phrased as follows:

“To create attractive, sustainable employment areas that improve the quality of life for employees by having personal services/amenities close by that allow for reduced dependence on the private automobile.”

Further discussion on and recommendations for managing the location of service commercial and employment supportive uses is provided in Section 12.3.3.

12.3.2 Balancing Office Space in Employment Lands versus the Central Business District

Like many other municipalities in Ontario, office development is allowed in Kingston's employment areas; however, downtown Kingston needs to maintain a share of new office development to help contribute to its long-term vibrancy. The O.P. indicates that the desire is to promote office uses in the Central Business District; Section 3.4.A.1 states that the Central Business District is intended to support a wide range of business offices (among many other uses), specifically “business and professional offices, civic activities, and related business service uses.” The O.P. further specifies that:

“In order to maintain the significance and vitality of the Central Business District, the City may limit the size or extent of uses necessary to support the CBD, such as offices and entertainment uses, in other locations in the City.”

The O.P. has some restrictions that prevent widespread office development; however, office space can be developed outside the Central Business District. For example:

- Section 3.4.C.2 indicates that, “permitted commercial uses include retail, service, and office uses” in the Main Street Commercial designation;
- Section 3.6.1 indicates that, “A full range of industrial, manufacturing...and office jobs, and related uses” are permitted in employment areas;
- In Section 3.6.A, Business Park Industrial proposes to attract “prestige office” uses and permits:
 - “corporate administrative offices and government offices”;
 - “data processing facilities, including call centres”; and,
 - “administrative, professional and technical services, such as engineering and surveying firms, that support the above uses.”

Directing office uses to the Central Business District sends a clear message that the downtown is a priority for the City and supports Kingston’s goals for intensification. On the other hand, if office uses are not permitted or are significantly restricted on employment lands, this reduces the marketability of the lands which is a major concern given the amount of public investment made on the City-owned employment lands.

Based on discussions with staff, there is no data available to determine whether office development in employment areas is negatively impacting the ability to develop further office space in the downtown. For the time being, the appropriate approach appears to be the monitoring of office development throughout the City and taking appropriate steps if necessary in the future. It is recommended that the City **consider adding a policy to the Official Plan describing the monitoring of office space development** and adopting policies, if necessary, to ensure a balance between office development in employment areas and in the downtown. The City may **opt to take a further step by requiring development proponents to justify why a certain threshold of office space is appropriate in an employment area rather than in the downtown**, following a similar approach currently applied to retail development in Section 3.4.9 of the Official Plan, although it would need to determine what the appropriate threshold would be to trigger the justification (i.e. a certain percentage of gross floor area developed as office, a specific amount of gross floor area developed as office, or a combination of both).

12.3.3 Strengthening Commercial and Complementary Land Use Policy for Employment Areas

12.3.3.1 Strengthening Commercial Land Use Policy for Employment Areas

Further to the discussion in Section 12.3.1 regarding the allowance for service commercial/amenity land uses, there is always a concern in municipalities across Ontario that allowing some of these service commercial uses opens the door for large scale commercial development that is not envisioned.

To continue to ensure that non-employment uses – in particular large-format retail uses – do not encroach into employment areas, the O.P. can be strengthened to explicitly differentiate between the complementary land uses which are encouraged and the other retail uses which are not intended. Currently, O.P. Section 1.4 defines Areas of Employment as:

“Areas of land designated in an official plan for clusters of business and economic uses including, without limitation:

- a. manufacturing uses;
- b. warehousing uses;
- c. office uses;
- d. retail uses that are associated with uses mentioned in clauses a) to c);
and,
- e. facilities that are accessory to uses mentioned in clauses a) to d).”

It is recommended that Kingston **consider strengthening the definition of Areas of Employment to explicitly exclude larger scale commercial uses** in item (d) with a wording such as:

“d. retail uses that are accessory to uses mentioned in clauses a) to c) but which shall not include destination-oriented commercial and shopping uses, such as Large Format Retail uses...”

12.3.3.2 Strengthening Complementary Land Use Policy for Employment Areas

We understand that there is currently an ad hoc approach to the development of complementary uses – there is an expectation that these land uses will not occupy more than 25% of a business park but this is not stated in policy, it is unclear how the 25% is measured (land area or floor space), and there is an expectation that these land uses will develop concurrently or after the employment uses have been developed but this is also not stated in policy. To better manage the interpretation of complementary uses

(that are intended to support the employee quality of life discussed in Section 12.3.1 of this report) and how they are intended to be developed, it is recommended that Kingston **consider strengthening the Complementary Use policies to direct how these land uses are phased-in and to establish an overall floor space threshold for them** in Employment Areas with wording such as:

“A complementary use may only be permitted concurrently with or after a primary permitted use is established”; and,

“The maximum gross floor area of all complementary uses within a defined business park or industrial area cannot exceed 25% of the total gross floor area of all primary permitted uses.”

The next step to better manage the location of complementary land uses would be to direct them into small clusters of service/amenity areas. Generally these service/amenity areas are appropriately located at the intersection of a collector road or arterial road, or at the entrances/gateways to industrial parks and business parks. It is recommended that Kingston **facilitate the clustering of service/amenity uses at collector or arterial road intersections** through updated policy and mapping in the Official Plan.

- With the exception of medical and paramedical (physiotherapy, laboratories, etc.) clinics that also contribute to employee wellness, the permitted complementary land uses of “restaurants, financial institutions, personal services, and convenience commercial uses” are broad enough to facilitate the type of employment supportive uses that offer employees access to amenities during their workday, so it is only these few additional uses that need to be added to the suite of permitted complementary uses.
- Further to the recommendation for updated policy, the O.P. could describe the locational criteria for complementary uses (for example, “within 300 metres of the centreline intersection between an arterial and/or collector road”).
- Further to the recommendation for updated mapping, the O.P. could identify the preferred locations for complementary uses using a symbol on the O.P. land use map (Schedule 3).

One other small issue in Kingston’s policies is a concern about how Policy 3.6.11 regarding retail sales areas could be interpreted. The policy currently states:

“A maximum of 25% of the total floor area of an employment use may be used for the purposes of the display and retail sale of products manufactured, processed, fabricated or assembled on the premises.”

Although it has not occurred, there is the potential to inappropriately interpret the policy to mean that 25% of an entire employment area may be developed for retail when in fact the policy is intended to allow for accessory retail related to a principal manufacturing, processing, fabrication or assembly use. Some examples of the development envisioned by this policy that we are aware of in Ontario include:

- A sofa manufacturer that has a showroom where all of its sofa styles and upholstery options are available on display but does not sell directly to the public;
- A cabinet and countertop manufacturer that has a small showroom open to the public for sales of its cabinets and countertops made on-site;
- An electronics refurbisher and distributor that, in addition to primarily shipping the refurbished goods to outlet stores for sale, also retails a portion of its refurbished electronics through a small storefront; and,
- A cookie factory that sells bulk packaged broken cookies (since the broken cookies do not meet the factory's unbroken quality standard for boxed retail sale) to the public at an on-site kiosk.

To reduce any potential for misinterpretation of Policy 3.6.11, it is recommended that Kingston **clarify the retail sales area policy to emphasize that the retail component related to an employment use is accessory**, as follows:

“Accessory Retail Sales Areas 3.6.11 A maximum of 25% of the total floor area of development on a lot designated for an employment use may be used for the purposes of accessory display and/or accessory retail sale of products manufactured, processed, fabricated or assembled on the premises.”

12.3.4 Pro-Actively Clustering Rural Industrial Development

Section 3.16 of the O.P. guides Rural Industrial development with the goal “to support the rural agricultural communities by allowing limited industrial development in appropriate locations.” Small-scale industrial uses and uses that do not have significant water/wastewater needs are permitted to locate in rural areas in some cases. Rural Industrial Zones in Kingston are designated on a case-by-case basis through a Zoning By-Law amendment (for smaller scale uses) and an O.P. amendment (for larger scale uses). Recently, there have been a number of inquiries for contractor’s yards throughout the rural area; while these are not considered an appropriate rural industrial

land use in Kingston's O.P. policy, it does raise the question about the appropriateness of scattered rural industrial development versus clustered rural industrial development. To encourage the orderly growth and development of industrial uses in the rural area, it is recommended that the City continue to concentrate rural industrial development to the McAdoo's Lane area (directly north of Highway 401 near Montreal Street). To accomplish this, it is recommended that additional rural industrial lands be designated along the south side of McAdoo's Lane, subject to an area-specific study of opportunities and constraints.

In addition to focusing rural industrial development within the McAdoo's Lane area, it is recommended that the City direct new rural development to specific designated rural areas based on established location criteria. This would help guide rural industrial uses in an organized manner and concentrate industrial development within identified geographic locations in the rural areas. In establishing this criteria, consideration should be given to location options which support the marketability and feasibility of rural industrial development (i.e. Highway 401 highway access/proximity, surrounding land uses, physical site characteristics, etc.), within the context of permitted rural industrial uses as set out in the Kingston OP. With this in mind, it is important to note that many of the location attributes which are considered attractive to rural industrial uses are also desirable to future urban industrial uses which may be required over the long term (i.e. greater than 20 years). Accordingly, it is recommended that location options for future rural industrial clusters preserve lands along Highway 401 interchanges with direct highway access and exposure for long term future urban development.

It is recommended that the locational criteria for rural industrial be addressed in the upcoming 5-year review of the O.P.

12.3.5 Clarification of the Eco-Friendly Policy

Section 3.16.4 of the Official Plan contemplates "eco-friendly" rural industrial uses and/or an "eco-friendly" rural industrial park as follows:

"...it is the intent of this Plan to encourage the development of new industry that is "eco-friendly" in terms of its use of solar energy or wind energy, its minimization and pre-treatment of waste materials, and its ability to recycle waste products to create energy or be re-used as a component of manufactured or assembled goods. The City may seek to develop "eco-friendly industrial park" areas in which there is a mutually beneficial relationship between industries in the sharing of energy

production or in recycling the waste of one industry into the production of products created by another.”

Staff indicate that this policy has been misinterpreted by various developers who believe the policy allows them to develop urban-type industrial land uses in the rural area on private services.

To remedy the misunderstanding caused by this policy, it is recommended that Kingston **relocate the “eco-friendly” policy from the Rural Industrial designation** because “eco-friendly” industry can be either urban or rural industrial. The policy should be integrated with Section 3.6.10 that describes resource efficiency which is the underlying philosophy of the “eco-friendly” industry that is envisioned by the policy, and **re-worded to emphasize sustainable development**. The updated Section 3.6.10 could read:

“Within areas of employment, buildings and sites will be encouraged to promote energy efficiency, renewable energy systems, recycling programs, composting programs, and other programs for conserving or re-using materials and resources. In keeping with the intent of the plan to foster sustainability, this plan encourages the development of new industries that have a mutually beneficial relationship in the sharing of energy production or in processing of by-products from one industrial activity to create value-added goods by another industrial activity.”

Policy 3.16.4 could then cross-reference back to Section 3.6.10 so that the sustainable development policy also applies to Rural Industrial.

12.3.6 Clarification of Permitted but Conflicting Land Uses

Efforts to improve the quality of life for employees in employment areas must not compromise the planned function of these areas for employment uses. In particular, sensitive land uses must not be introduced that would make it difficult for industrial uses to develop or expand. The Official Plan currently indicates that community facilities including centres for care for children or seniors are permitted in Employment Areas (Section 3.2.3); furthermore, community facilities are permitted in Waste Management Industrial (Section 3.6.C) and day care facilities are permitted in Business Park Industrial (Section 3.6.A) and General Industrial (Section 3.6.B) areas. It is recommended that Kingston **modify the policies in Sections 3.2 and 3.6 of the Official Plan to remove sensitive land uses currently permitted in employment areas**.

12.3.7 Keeping Pace: The Brownfield Community Improvement Plan

The City of Kingston encourages brownfield redevelopment through the Brownfield Community Improvement Plan, which was established in 2005 and most recently updated in 2013. Although the plan was revised in 2013, there are currently vacant industrial sites that could benefit from this programming.

Brownfields can be key sites for redevelopment and intensification, but while they remain as vacant employment lands, they skew the employment land inventory and can hinder the municipality's ability to appropriately plan for new employment uses. When brownfields are redeveloped, they contribute significantly to the community. For example, the Kingston Woolen Mill development on Cataraqui Street was a 20th century factory located along the water close to the City's downtown core. This site has been successfully redeveloped as professional offices, restaurants and a climbing gym – all uses that are compatible with the downtown area as compared to an underutilized former industrial site.

In some instances, there is merit to redevelop a brownfield site from a former defunct industrial use to a modern industrial use; in other instances, there is merit to redevelop a brownfield site to a non-industrial use, in particular where an industrial use is not likely to locate again or where the planned urban structure of the City has changed (meaning that the site is no longer desirable and/or appropriate for employment). In both instances, the Brownfield C.I.P. needs to keep pace to help encourage redevelopment of these sites and convert them to productive land uses. It is recommended that Kingston **continue to review and update the Brownfield C.I.P.**

12.3.8 Guiding the Transition: A Policy Framework for Conversion to Non-Industrial Uses

As described in Section 9 of this report, there is increasing pressure to convert designated industrial lands to other non-employment uses, namely commercial retail and residential uses. Sections 3.6.5a and 3.6.5b of the Official Plan provide criteria and conditions to assess a conversion, including considerations such as impact to the employment lands supply, intensity of use, the site's characteristics, beneficial impact to surrounding land uses, meeting a public need, etc.

However, the evaluation in Section 9 introduced more specific considerations to help evaluate the appropriateness of converting 14 sites from employment to non-employment uses. These eight criteria were:

1. Site is located outside or on the fringe of a designated industrial area;
2. Site is surrounded by non-employment land designations on at least three sides;
3. Conversion would not create incompatible land uses;
4. Conversion of site would not negatively affect industrial lands in the area;
5. Conversion would be consistent/supportive of City policy planning objectives;
6. Conversion doesn't contravene any City policy planning objectives;
7. Site offers limited market choice for industrial lands development due to size, configuration, physical conditions, other; and,
8. Site does not offer potential future expansion on existing or neighbouring industrial lands.

These eight criteria are an enhancement to the existing O.P. policy in Section 3.6.5. If the City needs to evaluate future requests for conversion, then it should apply these eight criteria since the precedent has been established in this review. To this end, it is recommended that the City **add a policy to the O.P. to cross-reference the additional eight conversion criteria developed for the E.L.R. or consider including these additional criteria in Section 3.6.5.**

12.4 Summary of Recommendations

The following is a summary of the recommendations resulting from the review of policy and zoning, and discussion of trends and issues:

- Policy recommendations from the comparative analysis:
 - any boundary issues between the Business Park Industrial and General Industrial land use designations be assessed as part of the 5-year review of the O.P.;
- Zoning recommendations from the comparative analysis:
 - consider removing or increasing the maximum lot coverage requirement;
 - consider lowering the exterior side yard requirement to 6 m in some or all zones;
 - consider increasing the maximum building height allowance to 30 m;
 - consider reducing parking space requirements for manufacturing and warehousing uses to reflect the low employees-per-hectare density of these land uses;
 - consider reducing the parking area setback (from lot line) requirement to 3 m;
 - consider increasing the threshold where only one loading space is required;

- consider increasing the threshold where only two loading spaces are required;
- consider reducing loading space setback requirements and also consider adding screening requirements;
- consider a slight reduction in required landscaped open space to 15%;
- consider a reduction in the required width of landscaping strips to 3 m;
- explore a zoning approach to help small, space-constrained industrial sites develop at higher intensity during the Comprehensive Zoning By-law project;
- Recommendations from the trends and issues discussion:
 - consider incorporating the philosophy of employee quality of life into Official Plan policies;
 - consider adding a policy to the Official Plan describing the monitoring of office space development;
 - consider requiring development proponents to justify why a certain threshold of office space is appropriate in an employment area rather than in the downtown;
 - consider strengthening the definition of Areas of Employment to explicitly exclude larger-scale commercial uses;
 - consider strengthening the Complementary Use policies to direct how these land uses are phased-in and to establish an overall floor space threshold for them;
 - facilitate the clustering of service/amenity uses at collector or arterial road intersections through updated policy and mapping in the Official Plan;
 - clarify the retail sales area policy in the Official Plan to emphasize that the retail component related to an employment use is accessory;
 - address locational criteria for rural industrial in the upcoming 5-year review of the O.P.;
 - review the lands at Highways 15 and 401 for their appropriateness as rural industrial during the 5-year review of the O.P.;
 - relocate the “eco-friendly” policy from the Rural Industrial designation and integrate it with Official Plan Section 3.6.10, and re-word it to emphasize sustainable development;
 - modify the policies in Sections 3.2 and 3.6 of the Official Plan to remove sensitive land uses currently permitted in employment areas;
 - continue to review and update the Brownfield C.I.P.; and,

- add a policy to the O.P. to cross-reference the additional eight conversion criteria developed for the Industrial Lands Review or consider including these additional criteria in Section 3.6.5.

13. Marketing Strategy Outline for the City's Industrial Lands

This Chapter provides an approach to a general marketing strategy for the City as it relates to targeting, promoting and attracting industrial and office development to the City's industrial/business parks. Best practices from other communities are also highlighted. While it is beyond the scope of this study to develop and implement specific marketing strategies for the City's industrial lands, some general direction and guidance is provided in this regard.

13.1 Key Elements of Marketing Strategy

Building on the recommendations and findings of the E.L.R., the City, in collaboration with K.E.D.C.O., should undertake a more comprehensive approach to marketing existing City-owned shovel-ready industrial lands in Kingston with the aim of increasing industrial land absorption and development activity. This would include highlighting the competitive advantage of Kingston as a location for industrial investment in a targeted manner. Marketing efforts should be geared towards the broader strengths and opportunities of Kingston, as well as specific target sector investment attraction efforts.

There are a range of marketing and promotional tools which can be utilized by the City and K.E.D.C.O. to inform prospective industries about Kingston's City-owned industrial lands. Key components which should be developed by the City in collaboration with K.E.D.C.O include:

- An effective place-branding for the City's industrial/business parks to raise their profile and impact regionally, nationally and internationally. The branding will help create a unique identity for the City's industrial lands and differentiate them from offerings in competitor municipalities. The branding component should incorporate the strengths/opportunities that Kingston offers and be oriented to target industry sectors.
- A business attraction package which would include a City-wide investment profile and profiles for each of the City's key industrial/business parks, most notably Cataraqui Estates Business Park and St. Lawrence Business Park. The profiles would contain information on location, parcel availability and pricing, sector information and planning and servicing.
- Development of sector-based initiatives with specific focus on the following key growth sectors, as identified in the K.ED.C.O. Strategic Plan 2015-2020:

- Agri-Business;
- I.C.T./Defence;
- Sustainable Emerging Technologies; and
- Healthcare.

The marketing initiatives discussed above should be supported through a broad range of communication tools including a strong internet presence, including web-based interactive tools and the use of social networking, newsletters and email blasts to showcase the competitive advantages of Kingston and business success stories.

13.2 Marketing Best Practices

A “factors of success” analysis has been undertaken to identify the approaches used to market Highway 401-oriented business parks. This analysis is intended to help identify “best practices” that Kingston could use to strengthen the marketing of its industrial/business parks.

Five case studies were reviewed to help illustrate the factors that make business parks desirable for companies when they are choosing to locate. In each case, the key selling point for the business park as a whole is summarized and then the marketing focus from a specific property is explained.

1. Oshawa/Whitby – Lakeview Industrial Estates: Existing Anchor and Transportation Advantage

Oshawa’s business parks¹ are designed to provide a range of lot sizes and tenures and are located with access to highways, railways, airports and shipping ports. The City of Oshawa focuses on the following five sectors for economic development:

- Advanced manufacturing;
- Energy Generation;
- Health and Biosciences;
- Multimodal Transportation and Logistics; and,

¹ Sources:

<http://www.choosewhitby.ca/en/siteselection/whitbysbusinessparks.asp>

[http://www.oshawa.ca/media/Sector%20Profile%20-%20Advanced%20Manufacturing\(1\).pdf](http://www.oshawa.ca/media/Sector%20Profile%20-%20Advanced%20Manufacturing(1).pdf)

<http://www.cbre.ca/EN/o/toronto-north/properties/999-boundary-road/Pages/overview.aspx>

- Information Technologies.

Important in their marketing strategy is clearly explaining what advantage the location provides for that specific industry. In the case of advanced manufacturing, Oshawa showcases that it is the Canadian Headquarters, Autoplex and Canadian Engineering Centre for General Motors (G.M.). They suggest that this makes the area part of the “automotive powerhouse” of North America with a critical mass of capital, R & D investment, support from the Province and a trained workforce to make this sector thrive.

Selling Features for a Sample Property in Oshawa

The following key features were identified for a +/-20 acre bulk distribution facility in the business park:

- Transportation:
 - Possibility of Rail Connection – C.N. as adjacent property;
 - Close proximity to 401 interchange;
- Proximity to G.M. Oshawa;
- Zoning features:
 - Outdoor storage permitted; and
 - 3% Office Space.

2. Guelph – Hanlon Creek Business Park: Prestige Business Park with Low Impact Design and Recreational Opportunities

Economic development in Guelph¹ emphasizes the quality of life offered in the community and the access to a well-educated workforce. Guelph also boasts being in the Greater Golden Horseshoe Area but outside the Greater Toronto Area traffic gridlock.

The campus-style Hanlon Creek Business Park has a variety of lot sizes available and is fully serviced with roads and utilities. The business park is located within 5 minutes of

¹ Sources:

<http://www.coopercon.com/wellington-crossroads-guelph.html>

<http://www.collierscanada.com/15464#.VKLoFF6AKA>

<http://guelph.ca/business/available-land-and-space/>

<http://guelph.ca/hanloncreek/>

<http://www.envida.ca/en/developingSustainableEnergy/Photo-Gallery-Hanlon-Creek-Business-Park.asp?mid=1238>

Highway 401. The park has been designed based on the principles of low impact design and to create a quality environment for employees. Further to this theme, the park contains a 165-acre environmental reserve with a 12 km trail network and the park also features a district energy system for heating and cooling. The sustainability features of this business park add a cachet that appeals to the values of certain businesses that aim to fulfill corporate social responsibility goals.

Selling Features for a Sample Property in Guelph

The business park has a total of 140 acres of land available for design/builds to lease or buy. The following features are highlighted:

- Flexible lot sizes: from 2 to 48 acres;
- Transportation:
 - Easy access to Highway 401;
 - Within 40km of an intermodal rail terminal; and
- Lower development charges and land costs relative to other G.T.A. municipalities.

3. Cambridge – Gateway Business Campus: Highway Exposure in the “Tech-Triangle”

This business park¹ is located directly adjacent to Highway 401, providing prominent exposure for those businesses that value visibility from the highway. This exposure is a key selling point for the property; the region as a whole is known as the “tech-triangle.” This reputation originates from the success of R.I.M. in Waterloo and has snowballed into a hub of industries that develop or employ advanced technologies in the core of their businesses. This “tech-triangle” branding and hub appeals to sectors such as research and development, advanced manufacturing, bio-tech and life-sciences and information technologies.

Selling Features for a Sample Property in Cambridge

The first two phases of the campus have been built and leased, now the third phase is shovel-ready and under construction. The key features are:

- Highway 401 exposure;

¹ Sources:

<http://www.techtriangle.ca/>

http://www.cambridge.ca/economic_development

- Transportation:
 - Adjacent to Highway 401;
 - Minutes from an interchange that is the “gateway” between Toronto and the Waterloo region;
- Nearby shops, restaurants, and parks add to quality of life; and
- “Build to suit” capacity.

4. Cornwall – Cornwall Business Park: Focus on a Growing Industry and Competitive Advantage in Land Costs

The Cornwall Business Park¹ has successfully attracted several large new tenants in recent years. Many of the new tenants are in the logistics and distribution sector. After successfully attracting one distribution sector tenant, Cornwall targeted other major retailers as they expanded operations in Canada. Low prices for industrial land make this a good location for these land-intensive industries. Relatively low cost of living in Cornwall also keeps labour costs lower. Cornwall is also located on the 401 making it easy to reach Toronto and Montreal, and has a border crossing to the U.S.

Selling Features for a Sample Property in Cornwall

The following features are highlighted for this business park:

- Transportation:
 - Adjacent to Highway 401;
 - Proximity to U.S., Quebec, Ottawa;
 - Adjacent to C.N. Rail corridor;
- Existing distribution centres including Walmart and Target;
- Low land costs; and
- No development charges.

¹ Sources:

http://www.choosecornwall.ca/index.php?page=business-park&hl=en_US

5. Ottawa – Kanata Research Park: Established and Growing Global Technology Centre

Kanata in Ottawa's west end has been a technology hub¹ for several decades. The tenants of this business park range from large multi-national companies to new start-ups. The City of Ottawa has helped to maintain momentum in this area through innovative programs such as business incubators and accelerators; for example, L-Spark Corporation which provides mentoring, connections to investors and other supports to promising start-ups. The Kanata Research Park also focuses on prestige and quality of life factors, containing a golf course, significant open space and support facilities such as day cares.

Selling Features for a Sample Property in Kanata

The business park is managed by the Kanata Research Park Corporation.

Features include:

- Existing thriving technology industry:
 - Allows for “cross-fertilization”;
 - Includes established companies such as Pfizer and Nokia Products Ltd.;
- Quality of life factors:
 - Support facilities such as day cares and hotels;
 - Located in the popular Kanata area of Ottawa with established residential communities, retail opportunities and the Canadian Tire Centre; and
 - Golf course and significant open space located within the park.

Observations on Factors of Success

The successful business parks profiled for this “factors of success” analysis are characterized by flexible development opportunities for a targeted audience. The similarities include:

- Must be flexible in terms of having a variety of serviced lot sizes and locations;
- Have fully serviced, shovel-ready opportunities;

¹ Sources:

<http://investottawa.ca/why-ottawa/>

<http://www.kanataresearchpark.com/>

<http://www.l-spark.com/>

- Create environments where people will want to work or where businesses want to be seen as locating;
- The marketing approach is focused on the types of business these municipalities are trying to attract:
 - It is recognized that no business park will be a perfect fit for every company;
 - Leverage existing strengths and market trends;
 - Consider the needs of the businesses in the sector being targeted;
 - Aggressively market the land in a way that appeals directly to those businesses;
 - Market specific properties that are ideal for the business being targeted;
 - Emphasize the synergies with and/or high profile status of the businesses that are already in the business park.

It is recognized that Kingston is attempting to replicate these same success factors for its business parks, leveraging the recently completed K.E.D.C.O. Strategic Plan (2015-2020) and the four high priority growth sectors identified for business marketing and development.

Similar to the Autoplex in Oshawa and the “tech-triangle” in Cambridge, Kingston needs to strongly align the marketing of its business parks with the four priority growth sectors in K.E.D.C.O.’s Strategic Plan. In doing so, Kingston will be able to establish a strong niche in the employment lands marketplace and differentiate itself from competing jurisdictions (it will of course still be open to other types of industrial development when they arise). Once this strong niche is established through the existence of multiple “anchor” businesses in these sectors, then the anchors will help draw similar businesses to Kingston. This will ultimately help realize the City’s goals for economic development and industrial land development, irrespective of the O.P. and Zoning By-law’s permission for a broad range of land uses.

14. Recommendations

The following summarizes the key recommendations arising from this study:

Industrial Land Needs

- Kingston has a shortage of vacant prestige industrial lands (i.e. Business Park designated lands) and City-owned lands and the City will need to be proactive in expanding the industrial land supply to meet forecast need.
- In order to allow for proper market functioning, it is recommended that a minimum five-year supply of serviced industrial lands (by various sizes, zoning and locations) is available at all times throughout the forecast period. This includes ensuring that the City maintains a minimum of 30 Ha (74 acres) of shovel-ready City-owned land available for sale.

Industrial Lands Conversions

- While there is a need to preserve Kingston's industrial lands, it is recognized that under some circumstances, a conversion may be justified for planning and economic reasons. This city-wide municipal comprehensive review identified twelve sites for potential conversion to non-employment uses and one site for potential conversion from non-employment to employment use. Key recommended conversions impacting the industrial supply include:
 - Former Nortel Lands – Recognizing the limited industrial development potential of the former Nortel lands, the City should convert the site from General Industrial to a mixed-use designation accommodating a range of residential and commercial development to high design and planning standards.
 - Former Cohen Property – Given its location and the forecast demand for prestige industrial development, it is recommended that the site be redesignated from Residential/General Industrial to Business Park Industrial.
- The framework utilized by the City to evaluate employment to non-employment conversions should be strengthened further to be more comprehensive in terms of the planning and economic criteria considered. It is recommended that Section 3.6.5 of the O.P. be modified to incorporate the additional planning and economic evaluation criteria utilized in the conversions evaluation presented herein.

City's Role in Industrial Land Development

- The City should continue to be a key player in industrial land development for the foreseeable future, though there may be opportunities to partner with external parties on select projects through public-private partnerships.

Accommodating Future Growth Within Existing Industrial Areas

- A significant share of Kingston's forecast employment growth is expected to be accommodated on industrial lands and there is a need to maximize development potential of Kingston's industrial lands.
- In the short to medium term, the City should concentrate its efforts in accommodating new industrial and office development in industrial areas with the broadest market choice of shovel-ready industrial lands and strongest market attributes. This includes the Cataraqui Estates Business Park, St. Lawrence Business Park and Gardiners Road Industrial Area.
- The City should aim to accommodate 10% of future employment growth on urban industrial lands through intensification.
- The City should monitor intensification development in industrial areas on a go forward basis by tracking the location of building permit activity on industrial lands.
- The City should undertake an industrial intensification strategy to effectively assess and evaluate intensification potential and opportunities to ensure that the City can meet the identified intensification target.
- The City should promote intensification and redevelopment within its older industrial areas – namely within the Old Industrial Area and the Alcan Industrial Area – to maximize utilization of developed industrial lands.

Old Industrial Area

- Within the Old Industrial Area, sites with frontage on major arterials including Montreal Street and Division Street have limited marketability and it is recommended that the City redesignate these lands from General Industrial to a Business Park Industrial designation in accordance with Section 3.6.A.7 of the O.P. This includes the 670 Montreal Street property.
- General industrial lands that are in proximity to sensitive land uses, such as residential uses, should be considered for Business Park Industrial designation to make them more compatible with these neighbouring land uses and reduce the

potential for land-use conflicts. Lands in the area retaining a General Industrial designation are best suited for light industrial uses.

- The northern part of the Wellington Street extension is required to permit access and development of a number of key vacant sites and improve the development potential of the broader area.
- It is recommended that a secondary plan be completed for the Old Industrial Area which considers the recommendations identified herein.

Alcan Industrial Area

- The City should redesignate the J.S.M. Property from General Industrial to Business Park Industrial and work with the land owner to maximize the development potential of the property.
- The City should explore options to expand the Alcan Business Park to the south over the longer term, which would involve acquiring a portion of the unused lands of the Novelis site (upwards of approximately 15 Ha) for the purpose of business park development.
- It is recommended that the City prepare a secondary plan for the Alcan Industrial Area.

Accommodating Future Growth within New Industrial Areas

- The City will need to strategically plan for the development of new industrial expansion areas to accommodate the medium- to longer-term industrial land needs. Over the medium term (5-10 years), it is recommended that:
 - **The remaining unserviced designated industrial lands within the Cataraqui Estates Business Park (49 Ha) be serviced by 2021.** For these subject lands, the western half (16 Ha) is City-owned and the eastern half (33 Ha) is privately owned by one land owner. It is imperative that the identified planning-related work, including the development of a concept plan and draft plan of subdivision be completed in the near term. Given forecast demand for prestige industrial land, it is recommended that the majority of the lands, including those in proximity to Highway 401, be designated Business Park Industrial.
 - **The Deferred Area (47 Ha), consisting of the Clogg's Road Property and former O.R.C. lands, be designated for Industrial use and serviced in the medium term.** It is recommended that the City designate, service and develop the lands for Business Park uses in the medium term. In order to ensure that the lands are available for

development in the medium term, it is recommended that the Secondary Plan process be completed in the short term.

- **The City expand its Urban Boundary to accommodate the Brown property lands immediately north of the St. Lawrence Business Park with the intent of developing these lands over the longer term.** Given the identified shortfall of prestige and City-owned industrial lands, it is recommended that the City expand its Urban Boundary as part of the 2015 O.P. Review to accommodate this area, with the intent of developing the lands west of Butternut Creek (24 Ha) over the longer term. It is recommended that these lands be designated as a “Deferred Area” that will be subject to area-specific phasing policies that will require the City to undertake a Secondary Plan or possibly a detailed Concept Plan process in the short to medium term. These lands should be considered for Business Park Industrial designation through the Secondary Planning process.
- **The City should explore development opportunities with Queen’s University and other external partners to expand the shovel-ready land supply within Innovation Park.** This would involve servicing and developing the 20 Ha (50 acres) of vacant designated land currently owned by the University located next to the existing park.
- **Develop a secondary plan for the Sydenham Road/Highway 401 Industrial Area and work towards developing the designated industrial lands over the longer term.** Over the longer term, the City should work towards developing these lands for Business Park uses. The subject lands are privately owned and the City should explore options to purchase the lands or jointly develop them with the private sector. In accordance with the City’s O.P., a Secondary Plan should be prepared in the medium term.

Policy and Zoning Evaluation and Recommendations

Conducting a comprehensive review of Kingston’s industrial lands provided a key opportunity to assess the effectiveness of the policies and regulations for employment areas. The E.L.R. included a comprehensive evaluation of the City of Kingston’s O.P. policies and Zoning By-Law requirements.

In terms of O.P. policy and Zoning By-law requirements, Kingston is well-prepared to accommodate a wide range of proposed development in its employment areas.

The following is a summary of the recommendations resulting from the review of policy and zoning, a subsequent “factors of success” analysis, and discussion of trends and issues:

Zoning Recommendations

- Consider removing or increasing the maximum lot coverage requirement;
- Consider lowering the exterior side yard requirement to 6 m in some or all zones;
- Consider increasing the maximum building height allowance to 30 m;
- Consider reducing parking space requirements for manufacturing and warehousing uses to reflect the low employees-per-hectare density of these land uses;
- Consider reducing the parking area setback (from lot line) requirement to 3 m;
- Consider increasing the threshold where only one loading space is required;
- Consider increasing the threshold where only two loading spaces are required;
- Consider reducing loading space setback requirements and also consider adding screening requirements;
- Consider a slight reduction in required landscaped open space to 15%;
- Consider a reduction in the required width of landscaping strips to 3 m; and
- Explore a zoning approach to help small, space-constrained industrial sites develop at higher intensity during the Comprehensive Zoning By-law project.

Urban Policy Recommendations

- Any boundary issues between the Business Park Industrial and General Industrial land-use designations be assessed as part of the 5-year review of the O.P.;
- Consider incorporating the philosophy of employee quality of life into O.P. policies;
- Consider adding a policy to the O.P. describing the monitoring of office space development;
- Consider requiring development proponents to justify why a certain threshold of office space is appropriate in an employment area rather than in the downtown;
- Consider strengthening the definition of Areas of Employment to explicitly exclude larger scale commercial uses;
- Consider strengthening the Complementary Use policies to direct how these land uses are phased-in and to establish an overall floor space threshold for them;
- Facilitate the clustering of service/amenity uses at collector or arterial road intersections through updated policy and mapping in the Official Plan;

- Clarify the retail sales area policy in the O.P. to emphasize that the retail component related to an employment use is accessory;
- Modify the policies in Sections 3.2 and 3.6 of the O.P. to remove sensitive land uses currently permitted in employment areas;
- Continue to review and update the Brownfield C.I.P.; and
- Add a policy to the O.P. to cross-reference the additional eight conversion criteria developed for the Industrial Lands Review or consider including these additional criteria in Section 3.6.5.

Rural Policy Recommendations

- As identified in Chapter 12, Section 3.16 of the Kingston O.P. guides Rural Industrial development with the goal “to support the rural agricultural communities by allowing limited industrial development in appropriate locations.” Small scale industrial uses and uses that do not have significant water/wastewater needs are permitted to locate in rural areas in some cases. In accordance with the City’s O.P. policies with respect to rural industrial development, the following recommendations are provided:
 - Continue to concentrate rural industrial development to the McAdoo’s Lane area. To accomplish this, it is recommended that additional rural lands be designated along the south side of McAdoo’s Lane, subject to an area-specific study of opportunities and constraints;
 - Develop location criteria which directs future rural industrial development to specific areas designated for rural industrial development in the upcoming 5-year O.P. review;
 - Discourage scattered industrial development in the rural area outside of defined rural development clusters; and
 - Relocate the “eco-friendly” policy from the Rural Industrial designation and integrate it with Official Plan Section 3.6.10, and re-word it to emphasize sustainable development.

Marketing Strategy Recommendations

- The City, in collaboration with K.E.D.C.O., should undertake a more comprehensive approach to marketing existing City-owned shovel-ready industrial lands with the aim of increasing industrial land absorption and development activity. This should include development of place-branding for the City’s industrial/business parks, preparation of a business attraction package, undertaking sector-based initiatives and utilizing a range of communication tools.

- Kingston should strongly align the marketing of its industrial/business parks with the four priority growth sectors (agri-business, sustainable emerging technologies, I.C.T./defence and healthcare) in K.E.D.C.O.'s Strategic Plan.

Appendix A – Key Findings of Stakeholder Consultation

City of Kingston Employment Land Strategy Review – Development Community Consultation Stakeholder Workshop Follow Up

On June 18, 2014, the City of Kingston and the retained Consultant Team hosted a development community consultation workshop as part of its Employment Land Strategy Review study. This included a presentation of preliminary study findings and stakeholder group breakout session. The event was well attended and we received valuable feedback from the development community. Further, the Consultant Team engaged the development community through telephone interviews regarding the Kingston industrial market. A summary of general observations based on these initiatives are summarized below.

Where is the City of Kingston now?

Question

1. How would you characterize the current industrial lands market in Kingston?

- What factors and demands have influenced the location/magnitude/type of industrial and office development in the City?
- What is the current health of the City's industrial and office market (in terms of development activity, market rents, vacancy rates)? How does it compare to conditions of 5 or 10 years ago?
- What makes Kingston attractive for industrial/office development? What are its strengths/assets (e.g. location, work force)?
- How competitive is Kingston in terms of industrial/office development compared to other municipalities along the 401 Corridor (e.g. Belleville, Brockville etc.)?
- What industrial/business parks are most competitive/in demand, or have the strongest opportunities?

Response

Strengths/Opportunities:

- Kingston is well located geographically – on Highway 401 corridor – between major urban centres (i.e. Toronto, Montreal and Ottawa) and has a highly educated labour force;

- City offers high quality of life;
- City has a sufficient supply and market choice of vacant industrial lands;
- Competitive industrial land prices relative to G.T.A.;
- City's newer industrial/business parks are considered highly marketable – e.g. Cataraqui Estates Business Park; and
- There is need to have a vision for the City which identifies the kinds of development/businesses (sectors) which we want that is based on the City's assets/strengths.

Weaknesses/Challenges:

- Local economy, particularly in the industrial sector, is weaker than it has been in the past;
- Recent government cut backs are not helping economic recovery;
- Industrial development market remains soft/has softened recently;
- Office market is very soft – high vacancy, limited market currently to build new office buildings. Some opportunities for multi-tenant office condos which is where most office-related demand is;
- Erosion of mid- to large-scale companies with presence in City;
- Industrial taxes, development charges and utility costs are a concern – less expensive to develop industrial projects in neighbouring municipalities;
- Letter of credit requirements – now 50%, previously 10%; challenge for smaller developers to pay up-front costs;
- Lack of “blue collar” labour force in Kingston is a challenge for industrial sector;
- To build a new industrial building is relatively expensive; cheaper for businesses to buy existing building, if available;
- Site plan approval required for all sites, not just sites on major roadways – added requirement which adds additional time to project timeline – site plans are not typically required for internal lots in other municipalities;
- Building coverage requirements are considered a constraint to development – not all users can meet minimum requirements and some want potential for future expansion;
- Industrial zoning and permitted uses not in-line with market opportunities – zoning should offer more flexibility in terms of permitted uses.
- City could do more to help retain, expand and promote small business – City could be more “business friendly”;
- City needs to provide greater opportunities for accommodating lower order uses such as heavy industrial/waste management/cement plants, etc.;

- City needs to recognize the importance of the rural area for accommodating industrial-type businesses. Provide opportunities for development in these areas; and
- Kingston doesn't seem as attractive for big name industrial companies compared to neighbouring municipalities such as Belleville, Brockville.

What is the potential for Kingston's industrial lands market?

Question

2. What is your perspective on the short-term market (i.e. 0 to 12 months) and medium/longer term market for industrial lands development in Kingston? Does it vary by industrial park area? What type of industrial and office development holds the most potential for Kingston in the future? Why?
 - How is/are market demand/market dynamics changing?
 - What industry sectors are anticipated to drive the market? What building typologies are likely to be in the greatest demand in Kingston in the future?
 - What are the most important market trends in the next decade?

Response

- The industrial market has remained soft for a time and will likely remain challenged for the short term – longer term prognosis is unclear;
- City has a healthy supply of industrial and office market product to meet short-term needs of businesses with the exception of smaller units (5,000-10,000 sq.ft. space);
- Market has seen a fair amount of existing businesses relocating within the City – not that many new businesses to City;
- Highest demand for smaller scale buildings but higher ceiling heights for industrial. Older industrial buildings not very marketable due to low ceilings;
- Development activity and business growth highly influenced by public sector;
- Steady demand for premium/professional office, mixed-use development;
- Some opportunities for light small scale industrial and food processing;
- Opportunities for incubator-type businesses;
- Opportunities in “knowledge-based” sectors; and
- Significant growth in small-scale businesses.

Question

3. What are the redevelopment opportunities/potential within older industrial areas?
What are the constraints/challenges moving forward?

Response

- Potential for redevelopment within older industrial areas varies widely by location and attributes (i.e. location, property size);
- Opportunities for mixed-use development;
- Interest expressed in redeveloping part of former Alcan site for business park with mix of industrial/commercial/office uses; and
- Need to have public sector involved to promote/facilitate redevelopment.

How does Kingston achieve its potential?**Question**

4. Are there any notable challenges that should be addressed to encourage industrial and office development within Kingston industrial lands? What can the City of Kingston do to improve the prospects for the industrial and office development environment?

- Policy (Zoning By-law, Official Plans, development approvals);
- Financial (development costs);
- Transportation issues (access, traffic); and
- Land Supply – market opportunities for development.

Response

- Simple zoning and make it more flexible and in-line with market demands/trends;
- Amalgamation of original four zoning by-laws is important – would make it easier and less confusing;
- Lower costs of development;
- Reduce phasing requirements of development and coverage requirements;
- City should improve customer/business service;
- City needs to review “best practices” in other municipalities;
- Need to connect Centennial Drive through to allow better connection to 401; and
- Over longer term, City should consider expanding industrial lands to north of 401.

Appendix B – Written Submissions Through Public Consultation

Appendix B – Written Submissions Through Public Consultation

Employment Land Strategy Review Summary Table of Written Submissions		
Submission	Discussion	Action
<p>James Ward, by email dated March 1, 2015:</p> <ul style="list-style-type: none"> • Considers the forecast demand for industrial land identified in report to be too high – does not reflect recent trends and current market conditions. • Questions the need for the City to make further capital investments to service more industrial land at this time. • Suggests that the City improve marketing of industrial lands, provide more flexibility for land purchasers in terms of coverage, building completion timelines and range of permitted uses. 	<ul style="list-style-type: none"> • Our industrial demand forecast is derived from a City-endorsed employment forecast which is relatively modest in terms of forecast industrial employment growth. • Our corresponding industrial land absorption forecast over the next 20 years averages 8 net Ha annually, moderately lower than the land absorption achieved over the past decade (12 net Ha per year). • While we appreciate the concerns regarding forecast industrial land demand not reflecting recent trends in the market, it is important to note that the recent economic recession had a significant negative impact on industrial land development within Kingston, resulting in unusually low levels of industrial development in the City during the post-2009 period. We anticipate that the industrial land market will gradually improve and return to more historical levels. • Given the structure of the industrial land market in Kingston, it is vital that the City remain a key player in the 	<ul style="list-style-type: none"> • No further action required at this time.

Employment Land Strategy Review Summary Table of Written Submissions

Submission	Discussion	Action
	<p>development of industrial/business parks.</p> <ul style="list-style-type: none"> To ensure the sustainability of vacant industrial land supply over the long-term, it is critical that the City be proactive in planning for new industrial expansion areas. However, it is recognized that the rate of industrial land absorption needs to be monitored and the servicing of new industrial lands should occur in a manner which maintains the required supply of shovel-ready lands to meet market needs. We appreciate the suggestions provided to help facilitate industrial land development in the City. We have addressed these in the report under the Policy and Zoning Evaluation (Chapter 12) and the Marketing Strategy Outline (Chapter 13). 	
<p>Ken Dantzer, by email dated February 27, 2015 and March 2, 2015:</p> <ul style="list-style-type: none"> Suggests that the City should maintain an aggressive supply of shovel-ready vacant employment lands providing market choice by geographic area and parcel size. Requests that the City identify the method which is to be taken to determine when to proceed with large 	<ul style="list-style-type: none"> We appreciate the need for a sufficient market supply of serviced shovel-ready industrial lands to be maintained at all times to meet market demand and provide sufficient market choice. This has been emphasized in the study and we have provided recommendations on this, including maintaining a minimum five-year supply of serviced industrial lands (by various sizes, zoning and 	<ul style="list-style-type: none"> No further action required at this time.

Employment Land Strategy Review Summary Table of Written Submissions

Submission	Discussion	Action
<p>servicing investments for industrial lands.</p> <ul style="list-style-type: none"> • Comments regarding Figures 6-13 and 6-18 in the report regarding confirmation that figures assume all developable lands are built out and that a land vacancy adjustment of 15% has been applied. • Comments provided indicating that the current zoning has varying minimum/maximum lot coverage requirements but flexibility is important to encourage development. 	<p>locations) at all times.</p> <ul style="list-style-type: none"> • The study recommends that the City maintain a minimum of 30 Ha of shovel-ready City-owned lands at all times available for sale. This is to be used to guide the timing of servicing of new industrial lands. • In response to comments regarding Figures 6-13 and 6-18, the industrial land needs analysis assumes that all vacant designated industrial lands are potentially developable over the forecast period. We applied a 5% vacancy adjustment (based on total land area of developed and vacant industrial lands) to account for parcels which may not be developable due to site size, configuration, access, etc. Based on the analysis, the supply of existing prestige industrial lands and City-owned lands are exhausted in the forecast period. • Lot coverage is addressed in the report in the Policy and Zoning Evaluation (Chapter 12). 	
<p>John Uliana from IBI Group (on behalf of J.S.M. Corporation), by mail dated March 5, 2015 regarding J.S.M. Lands (725-801 Sir John A. Macdonald Blvd. & 993 Princess Street):</p>	<ul style="list-style-type: none"> • It was determined that J.S.M.'s proposed complementary service uses can be accommodated through the Business Park Industrial designation alleviating the need for a separate land 	<ul style="list-style-type: none"> • No further action required at this time.

Employment Land Strategy Review Summary Table of Written Submissions

Submission	Discussion	Action
<ul style="list-style-type: none"> • J.S.M. is in general agreement that the majority of their site (J.S.M. Property) should be redesignated from General Industrial to Business Park Industrial, as recommended in the Employment Land Strategy Review Report but maintain that the portion of land along Sir John A. Macdonald Blvd. be redesignated to a new designation called “Business Park Service” to allow for complementary service uses. • Disagrees with policy recommendations identified in study which requires development proponents to justify why a certain threshold of office space is appropriate in an employment area rather than downtown. J.S.M. strongly believes that this will retard the development of its site for business park uses and so do not agree with the proposed policy. • Questions why the planned future collector road, to connect through the Alcan Industrial Area, is not mentioned in the Employment Land Strategy Review report. Identifies that there is a need for the road to service the area (e.g. Innovation Park, J.S.M. Lands). 	<p>use designation. Further, the City currently does not have a Business Park Service land-use designation and it is beyond the scope of the Employment Land Strategy Review to propose one. The five-year update of the Official Plan will explore this matter as a policy issue to determine if the proposed new land use designation is warranted.</p> <ul style="list-style-type: none"> • Section 12.3.2 of the report explains that there is no data to determine whether office development in employment areas is negatively impacting the ability to develop further office space in the downtown. It also explains that the City would need to determine what the appropriate threshold would be to trigger a justification described in this recommendation. The five-year update of the Official Plan will explore this matter as a policy issue. This recommendation will only be proposed as new policy if there is a demonstrated negative impact to the downtown and if the appropriate floor space threshold can be determined. • While identified in the City’s O.P. Transportation schedule, the proposed 	

Employment Land Strategy Review Summary Table of Written Submissions

Submission	Discussion	Action
	collector road within the Alcan Industrial Area, is not identified in the City's current master transportation plan or D.C. background study. Identifying the need and configuration of the roadway as part of the Employment Land Strategy Review is beyond the scope of the study and would need to be addressed in subsequent studies.	

Appendix C – Industrial Land Inventory

Figure C-1

**City of Kingston Industrial Lands - Vacant and Developed Land within the Urban Area
Alcan Business Park (ABP), Alcan Industrial Area (AIA) and Innovation Park (IP)**



Figure C-2

**City of Kingston Industrial Lands - Vacant and Developed Land within the Urban Area
Airport Industrial Lands (AIL)**

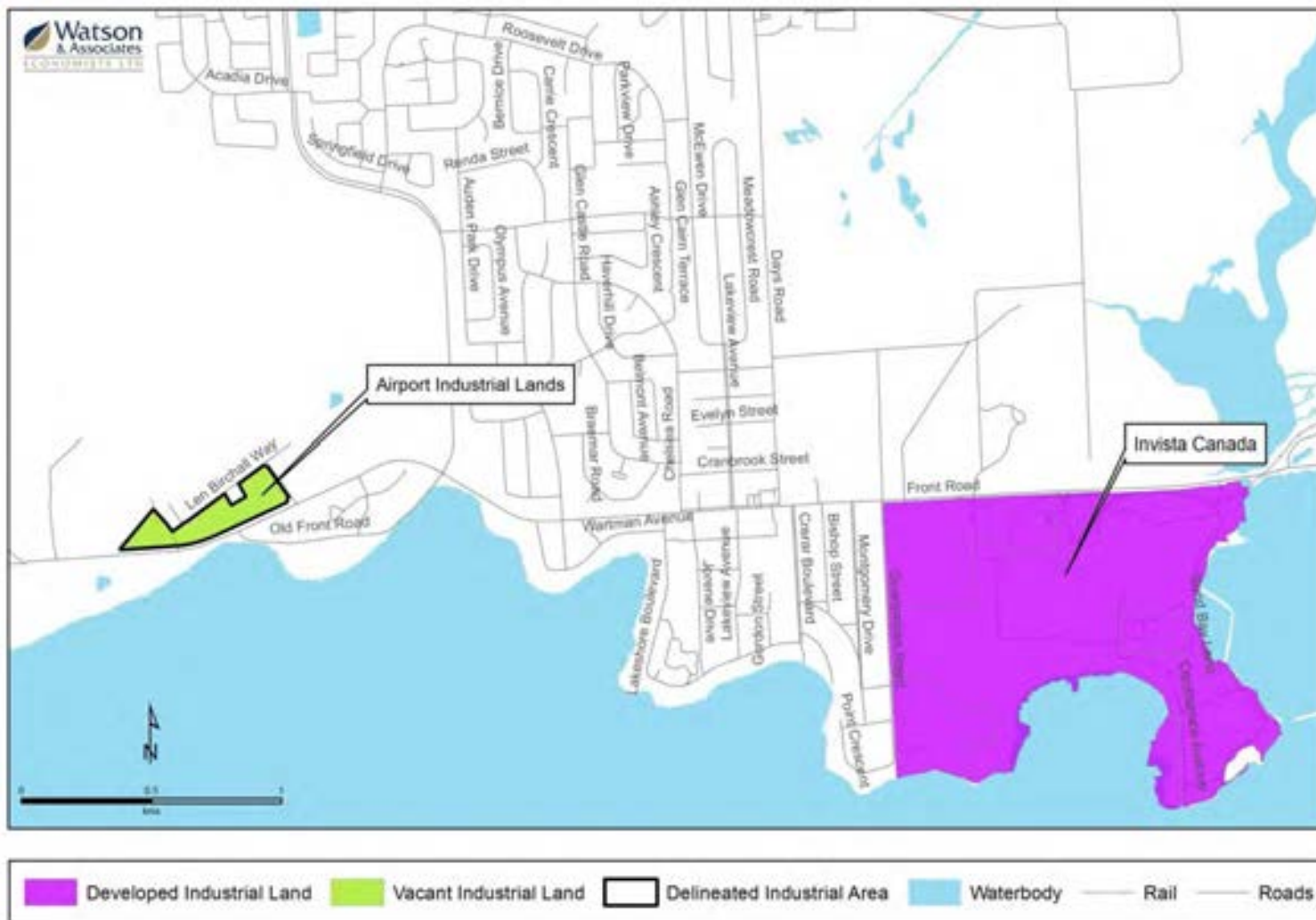


Figure C-3

**City of Kingston Industrial Lands - Vacant and Developed Land within the Urban Area
Cataraqi Estates Business Park (CEBP) and Gardiners Road Industrial Area (GIA)**

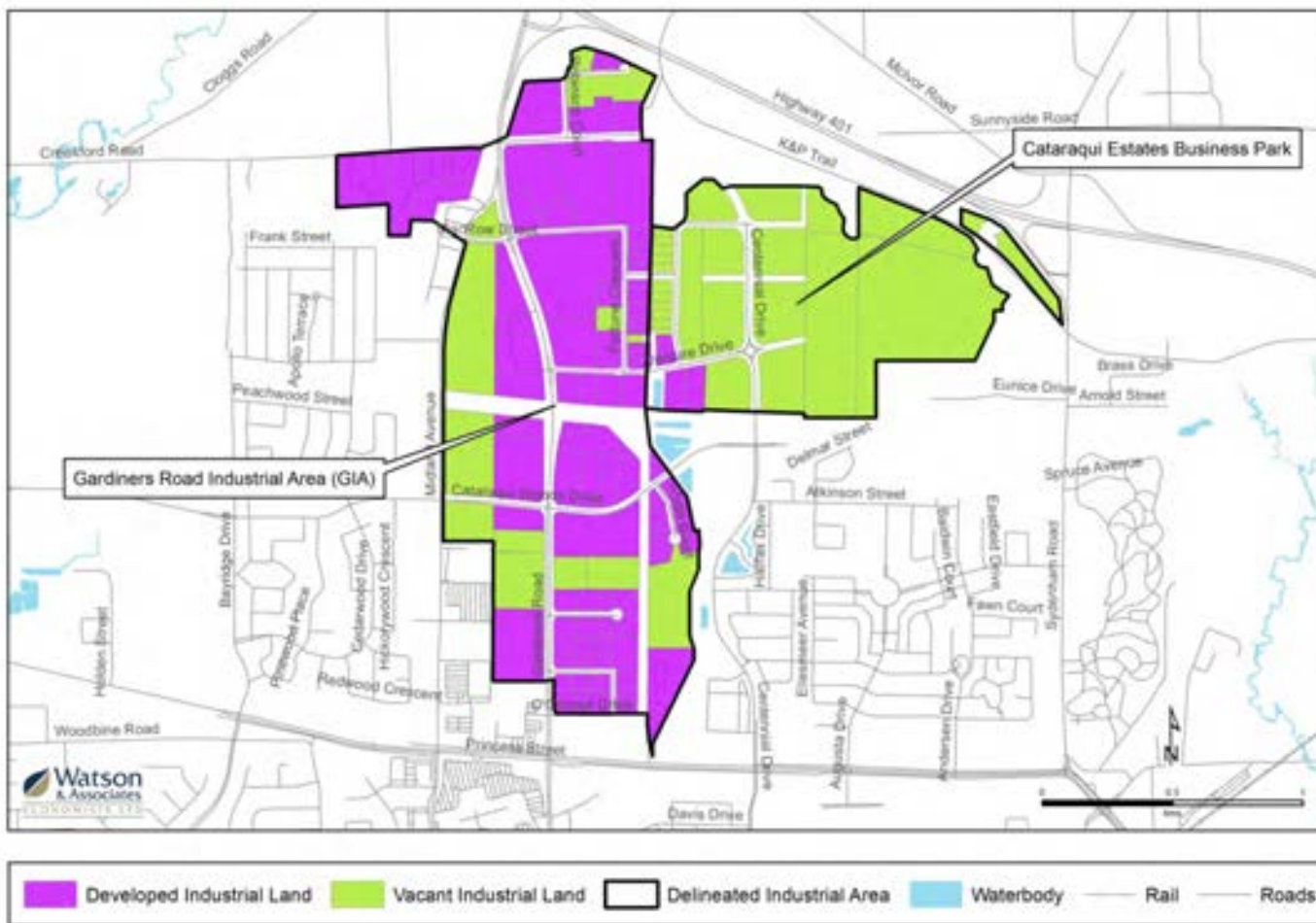


Figure C-4

**City of Kingston Industrial Lands - Vacant and Developed Land within the Urban Area
Clyde Industrial Park (CIP) and Sydenham Road/Highway 401 Industrial Area**

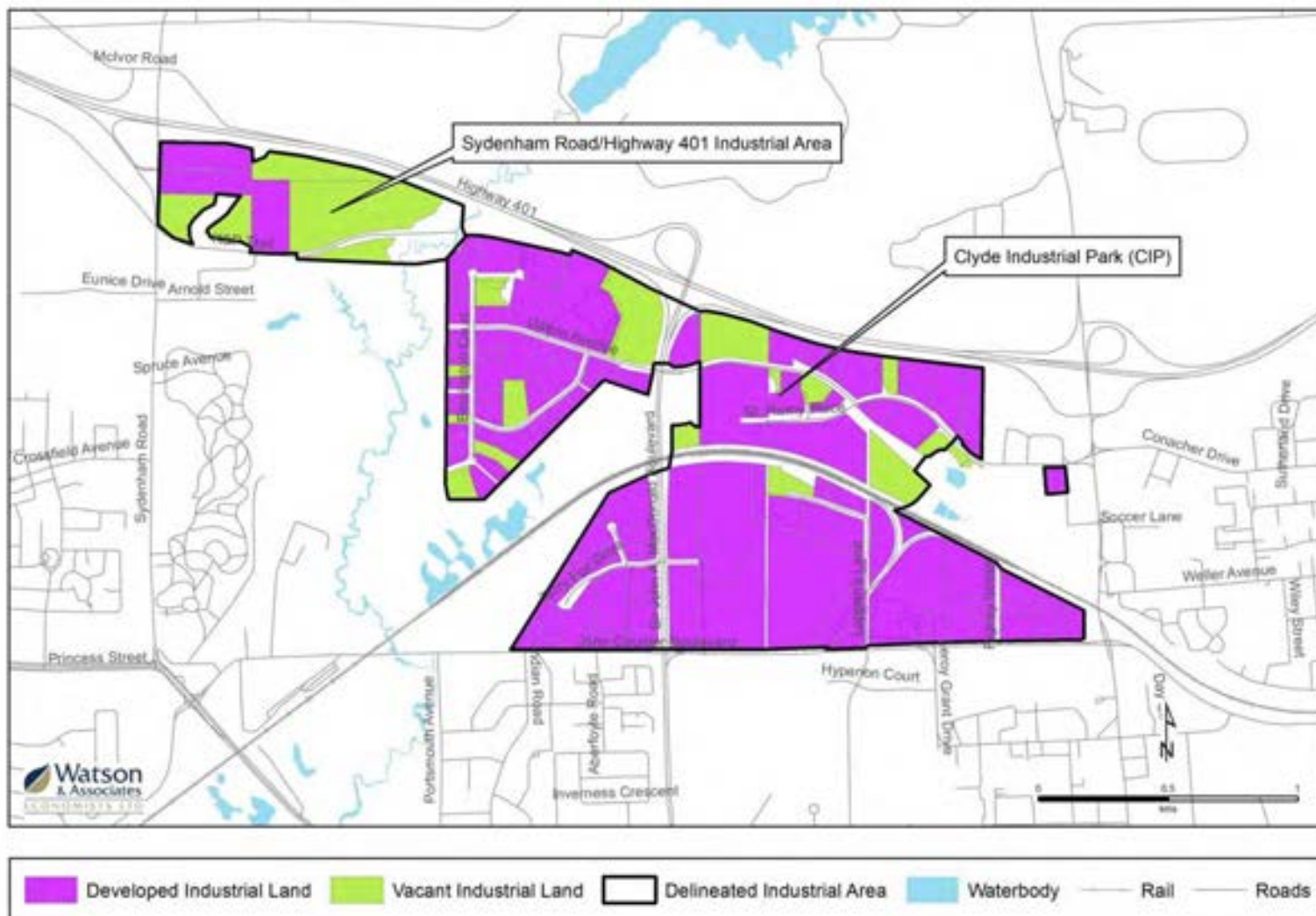


Figure C-5

**City of Kingston Industrial Lands - Vacant and Developed Land within the Urban Area
Old Industrial Area (OIA)**

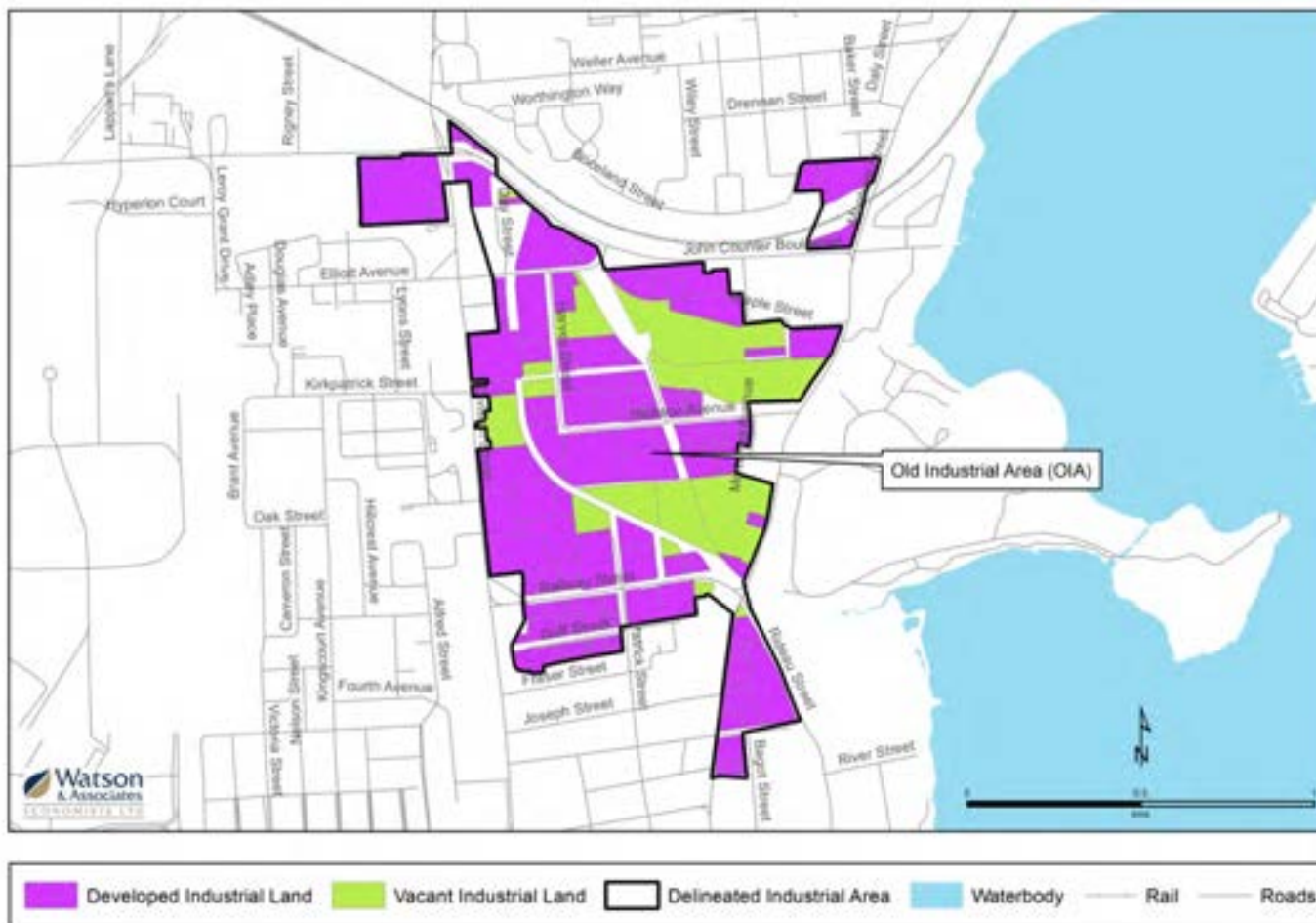


Figure C-6

**City of Kingston Industrial Lands - Vacant and Developed Land within the Urban Area
Progress Avenue Industrial Area (PIA) and Nortel Industrial Area (PIA)**

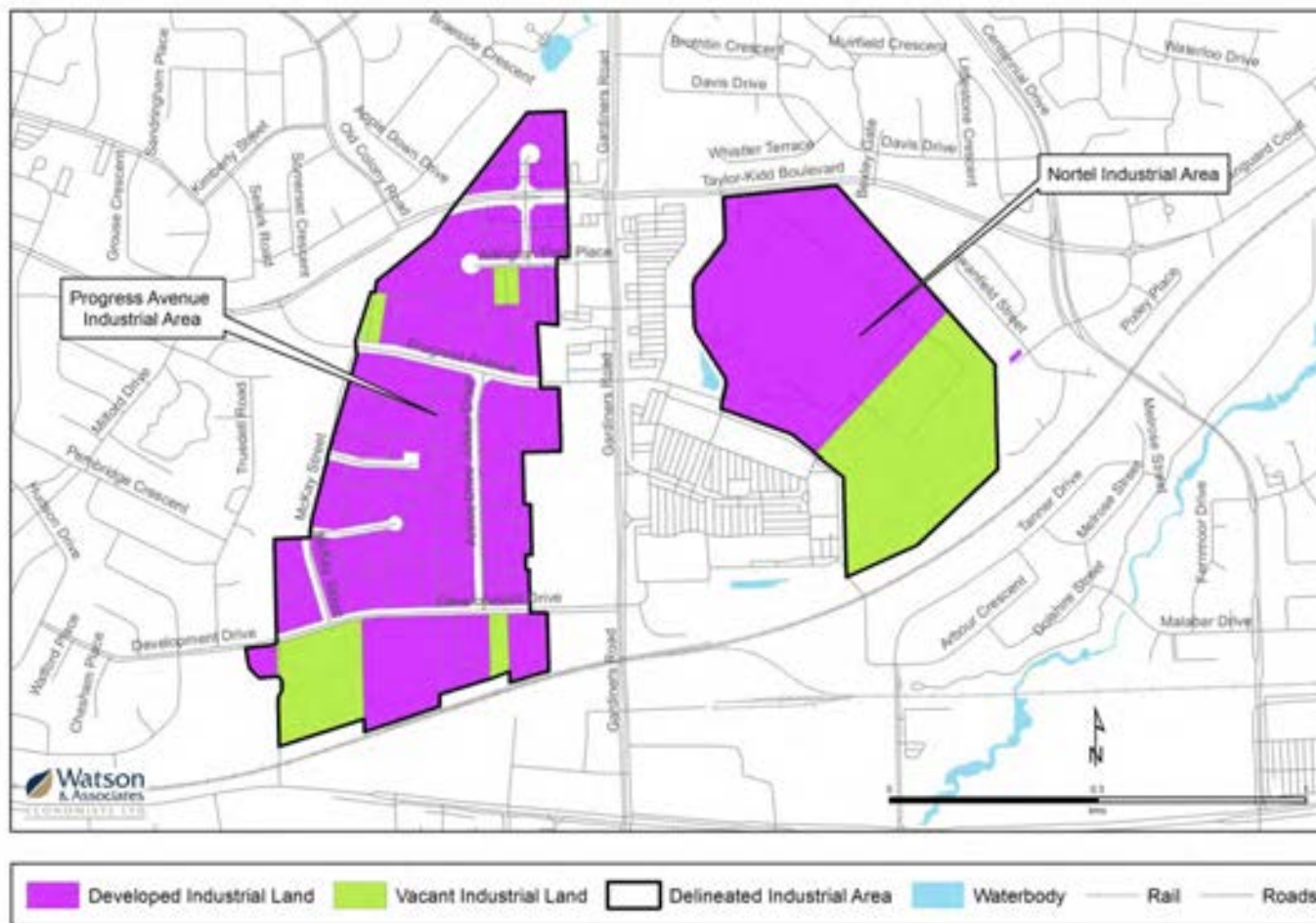
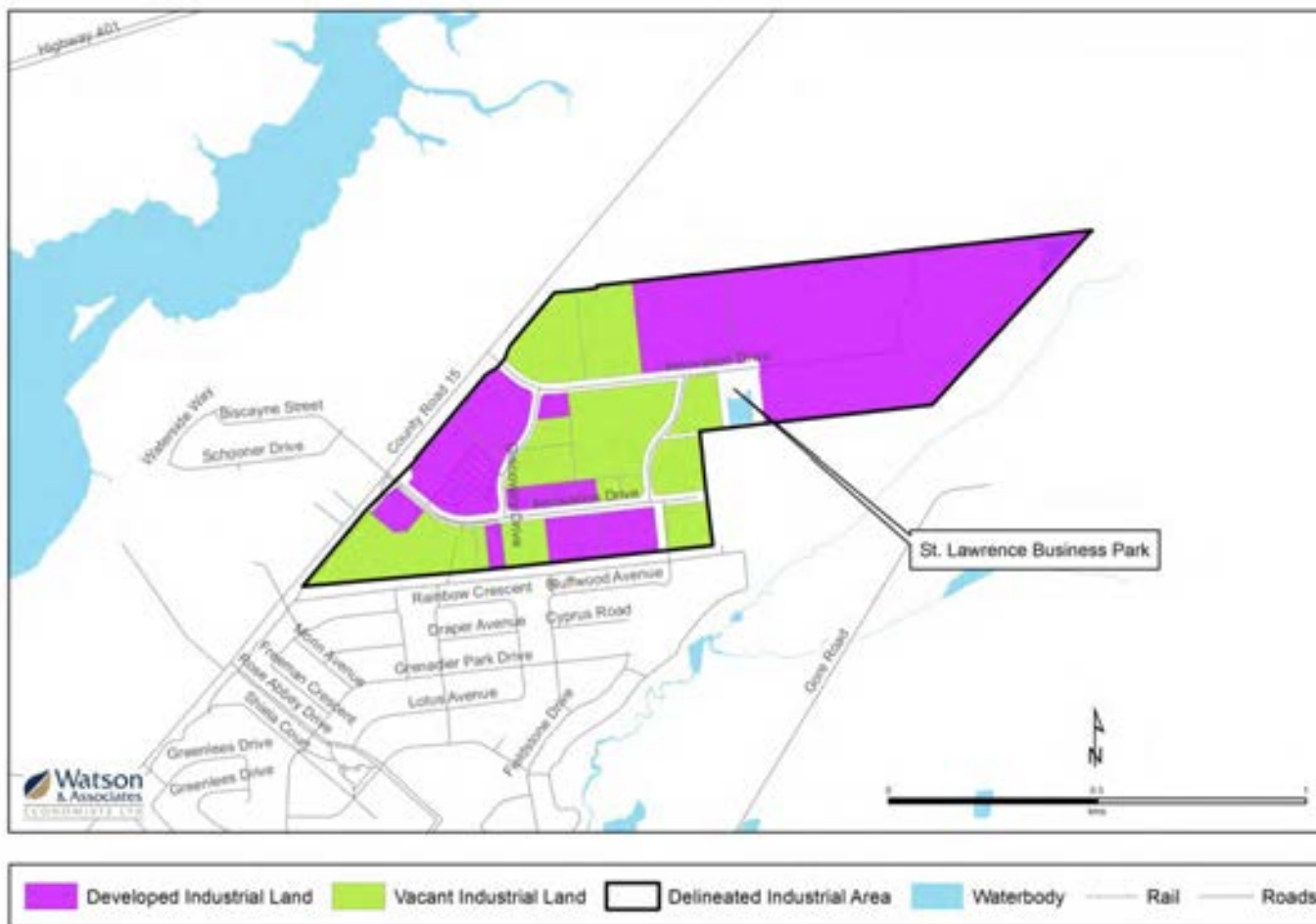


Figure C-7

**City of Kingston Industrial Lands - Vacant and Developed Land within the Urban Area
St. Lawrence Business Park (SLBP)**



Appendix D – Policy and Zoning Evaluation

Table D1: OP Comparison Matrix

	City of Kingston Official Plan, 2010	City of Belleville Official Plan, 2002	The Official Plan of the Town of Greater Napanee, 2002	City of Brockville Official Plan, 2012	City of Cornwall Official Plan, 2002
Locational Context	250km to Toronto 300km to Montreal	75km to Kingston 200km to Toronto 350km to Montreal	50km to Kingston 225km to Toronto 325km to Montreal	100km to Kingston 350km to Toronto 200km to Montreal	200km to Kingston 450km to Toronto 100km to Montreal
Definitions	<p>(1.4) Areas of Employment : Areas of land designated in an official plan for clusters of business and economic uses including, without limitation:</p> <ol style="list-style-type: none"> manufacturing uses; warehousing uses; office uses; retail uses that are associated with uses mentioned in clauses a) to c); and facilities that are accessory to uses mentioned in clauses a) to d). <p>Complementary Use: Means a separate and independent use which is different from the predominant class of uses permitted in an area but is in keeping with the context of the overall mix of uses and, in a mutually beneficial fashion with the primary uses, provides support and services to meet the needs of the primary uses without interfering with the intended function of its surrounding area.</p>	<p>(3.12) Industrial areas are considered to be the City's major enterprise zones, and the policies of this Plan are intended to provide flexibility to enable firms to respond quickly to changing economic conditions. General industrial uses may be large or small scale and may or may not be in enclosed buildings, and are usually incompatible with non-industrial uses. Service industrial uses are generally located within enclosed buildings with limited outdoor storage and do not produce levels of noise, dust or odours characteristic of general industrial uses which can be detected off-site.</p>	<p>(4.6.3.2) Light Industrial uses are those industries which are substantially enclosed in buildings and exhibit reasonably high performance standards and whose operations are not considered offensive because of heat, smoke, noise, dust, odours, and heavy transportation facilities usually associated with general industrial concerns. For the purposes of this Plan, such uses include warehousing, light manufacturing and assembly, laboratory and research facilities, offices, communication facilities, printing and publishing establishments, building supply yards or other similar uses. General Industrial uses are those industries whose operations may be offensive by virtue of heat, smoke, noise, odour, dust, and heavy transportation requirements. These include such facilities as the manufacturing and processing of primary metal products, wood and paper products, rubber, plastic and adhesive products, chemical products, food processing plants, assembly plants, bulk storage of petroleum products, contractor yards, maintenance yards, salvage yards, utility functions, and public works depots or other similar industrial uses and activities.</p>	<p>Employment area means area designated for clusters of business and economic activity including, but not limited to, manufacturing, warehousing, offices, and associated retail and ancillary facilities.</p>	<p>(4.8) The Industrial Land Use Designation includes all forms of manufacturing, processing, storage yards, assembly of goods, transportation, warehousing and wholesaling of bulk products. Also included are transportation terminals, automotive service and repair, industrial-commercial malls, commercial uses whose primary function is to serve the industrial area such as banks, restaurants, personal service shops, health and recreation centres, retail uses only if accessory to a permitted industrial use and a selected amount of business centres and office development subject to the policies of this Section.</p>
General Employment Policies	<p>(2.2) Goal: "To promote the continued evolution of Kingston as a unique City with valued natural and built resources and a historic legacy, having an efficient, sustainable, and strategic structure that best serves its citizens, businesses, workforce, and visitors." (2.2.7)</p>	<p>(2.1) The Vision identifies and directs strategies and planning policies of this Plan to create a diversity of economic development opportunities in balance with the provision of services in a financially sound framework. It recognizes the importance of industry and commerce to the economic structure of the community and the importance that</p>	<p>(3.3.1.2) To encourage the development of future employment generating uses such as service industries, commercial and industrial uses at locations compatible with the surrounding area and where they can be adequately serviced, as a means of diversifying the municipal tax base, and establishing local employment</p>	<p>(3.2.2) The structure for the City promotes the creation of a complete community, which meets immediate and future needs by providing access to a full range and mix of housing, diverse employment and shopping opportunities, a range of community services and facilities, recreational, parks and open space opportunities, convenient transportation choices, and</p>	<p>(2.2.2) Within the immediate district, the majority of urban growth will occur within the appropriately designated areas in the City of Cornwall. (2.2.4) It is assumed the City will continue to aggressively search-out and recruit new industries and employers to expand its economic growth and diversification. It</p>

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	<p>Business Districts are primarily intended to accommodate employment opportunities. These include General Industrial and Business Park Industrial designations, as well as the Waste Management Industrial designation and very limited retail and service commercial uses that serve business activities. Regional Commercial uses and some specialized quasi-commercial uses will be limited to the permitted uses for the specific designations, as described in Section 3. Standards in Business Districts will be sufficiently flexible to allow a ready response to new types of employment uses provided that:</p> <ul style="list-style-type: none"> a. areas of interface with sensitive uses are addressed so that there is no adverse effect on the sensitive use or to the proposed employment use(s); b. an upgraded visual appearance is maintained at gateways, along major roads and the interface with any Centre, Corridor or Housing District; c. uses which may involve noise or odour are sufficiently separated, buffered, or screened in accordance with the Ministry of Environment Guidelines (D-1 and D-6); d. uses which generate large amounts of traffic or have intensive on-site operations are located in areas that are able to accommodate, or can be improved to accommodate, such activity levels without adverse effects on the planned transportation system, the nearby Housing Districts, Centres or Corridors; and, e. regional commercial uses, institutions, recreation or hospitality uses will be restricted to limited locations that will not undermine the business park, industrial or technological uses intended as the focus of Business Districts. <p>(2.3) The City's goal is to strengthen its economy through robust job creation that is beyond that of the medium</p>	<p>small business and entrepreneurship must play in the City's future. (3.12) Areas designated Industrial land use on the land use schedules are intended to serve as the major concentrations of industrial activity and employment in the City. (3.12.2) This Plan encourages diversification of the types and sizes of industrial activities in the City.</p>	<p>opportunities. (4.6.3.2) The predominant use of the lands so designated is for light and general industrial uses and activities. The types of industrial uses permitted in each location shall be such that there are minimal adverse impacts on sensitive land uses.</p>	<p>the protection and enhancement of natural resources. (3.2.5.1) The Employment Areas promote a diverse economic base by maintaining a range and choice of suitable employment sites that support a range of employment and ancillary uses. The Employment Areas are the focus of major concentrations of industrial-related employment growth and development in the City, which may include manufacturing, logistics operations, warehousing, distribution, offices and related industrial and business park uses, in addition to ancillary commercial uses serving the Employment Area. Employment Areas do not support institutional uses or destination-oriented commercial and shopping uses, such as Large Format Retail uses. (3.2.5.5) 5. Employment Areas shall promote economic development and competitiveness by:</p> <ul style="list-style-type: none"> i. providing a range and mix of employment uses to provide for a diversified economic base; ii. maintaining a range and choice of suitable sites for employment uses to support a wide range of employment activities and related uses to accommodate both local and regional markets; iii. accommodating employment uses on full municipal water, wastewater and stormwater management systems, to the satisfaction of the City; iv. ensuring that certain employment uses are protected from intrusion by incompatible sensitive land uses; v. providing an appropriate level of transportation infrastructure; vi. directing employment related traffic to arterial roads, and away from local residential streets to the extent possible; and vii. protecting significant Natural 	<p>is expected that the City's economic base will continue to be impacted by the manufacture of paper products, textiles and chemicals, however, a general shift to service-based economic activity is to be expected. That will change Cornwall's economic base and may impact on requirements for development sites. (2.4.2) Industrial Development Goals: 26. Provide sufficient, serviced industrial land and sites to accommodate a variety of industrial and business developments and develop attractive, high quality industrial parks, while recognizing the evolving needs of service based industries. Institute an appropriate industrial hierarchy or classification system and ensure a rational, equitable and convenient distribution. 27. Encourage the efficient utilization of existing industrial areas and promote the appropriate redevelopment of pockets of underutilized land or obsolete industrial areas. (4.8.3) Establishes, Service Industrial, General Industrial, Heavy Industrial, and Extensive Industrial Zones.</p>

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	<p>growth forecast. (2.3.6) Within the urban area, the City will promote and protect areas of employment and pursue increased levels of job creation in the commercial, institutional and industrial sectors in order to foster a diversified and vigorous economic base with a range of opportunities for its residents. (3.6) Differentiates: Industrial areas manufacturing, warehousing... Business parks are more for office uses, R & D, and technology. Employment Areas, also referred to as areas of employment in this Plan, are becoming increasingly diverse, and a more flexible approach is warranted in response. Policies of this section are aimed at maintaining a healthy employment base and increasing the number of job opportunities in areas of employment, largely within the Urban Boundary. (3.6.2) Supports diversification and the city's four business parks.</p>			Heritage Features, areas and their functions.	
Permitted Uses	<p>(3.6.1) A full range of industrial, manufacturing, research and development, technology and office jobs, and related uses are permitted in Employment Areas. These are categorized in the city into three separate industrial land use designations: Business Park Industrial; General Industrial; and, Waste Management Industrial. The permitted uses and specific development policies of the three designations are detailed in Sections 3.6.A, 3.6.B, and 3.6.C of this Plan. (3.6.A) (BUSINESS PARK INDUSTRIAL) Goal: "To develop attractive areas for prestige office, research and similar employment uses at visible and</p>	<p>(3.12.1) Uses permitted in areas designated Industrial land use include activities associated with the manufacturing, assembling, fabricating, packaging or processing of goods and services, including transportation/truck terminals, warehouses, railway uses, and other similar uses. Other compatible uses such as commercial uses accessory to industrial uses, commercial uses which primarily serve the industrial area, wholesale establishments, office uses, equipment rental uses, data processing establishments, other quasi-industrial, service or business uses such as automotive services uses and utility or service companies, and commercial uses which require large sites for storage are permitted. Unless otherwise provided, retail uses that do not service the industrial area or do not have</p>	<p>(4.6.3.2) The predominant use of the lands so designated is for light and general industrial uses and activities: Light Industrial: For the purposes of this Plan, such uses include warehousing, light manufacturing and assembly, laboratory and research facilities, offices, communication facilities, printing and publishing establishments, building supply yards or other similar uses. General Industrial: uses include such facilities as the manufacturing and processing of primary metal products, wood and paper products, rubber, plastic and adhesive products, chemical products, food processing plants, assembly plants, bulk storage of petroleum products,</p>	<p>(3.2.5) The location of Employment Areas are designated on Schedule 1. In accordance with the policies of Section 4.7, Employment Areas shall be the focus of employment growth and shall accommodate a range of uses including manufacturing, logistics operations, warehousing, distribution, offices and related industrial and business park uses, in addition to ancillary commercial uses serving the Employment Area. Employment Areas shall not support institutional uses or destination-oriented commercial and shopping uses, such as Large Format Retail uses.</p>	<p>(4.8.3) (SERVICE INDUSTRIAL) 2. industrial uses which have no detrimental physical or aesthetic effects on the immediate environment, and can be located in close proximity to residential, institutional, or commercial uses without resulting in land use conflicts. Generally, these activities take place entirely indoors, require no noxious or unpleasant fumes, discharge or noise. Technical and scientific research establishments and call centres are examples of this category. (GENERAL INDUSTRIAL) 4. Establish a General Industrial zone including those industrial uses which will be of minimal detriment to adjacent uses from an aesthetic and physical point of view, but should not be located</p>

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	<p>physically accessible locations within the City.” Permitted uses: a. corporate administrative offices and government offices; b. research and development facilities; c. data processing facilities, including call centres; d. technologically advanced manufacturing, fabricating, and assembling operations for the production of high value products; and e. administrative, professional and technical services, such as engineering and surveying firms, that support the above uses and are consistent with the image and amenity of a Business Park Industrial setting. Complementary Uses: a. office and business services, such as printing and equipment repair, which are intended to serve the Business Park Industrial area; b. day care facilities; c. restaurants, financial institutions, personal services, and convenience commercial uses; d. public and private parks and recreation facilities; e. parking lots and structures; and f. sources of renewable energy, subject to the policies of the Section 6.2 of this Plan.</p> <p>(3.6.B) (GENERAL INDUSTRIAL) Goal: To provide suitable areas for a broad range of employment uses that include manufacturing, warehousing, construction and transportation activities and other employment uses with similar operating characteristics and locational requirements. Permitted uses: a. manufacturing, assembling, fabricating, and processing operations; b. construction and transportation activities and facilities; c. storage, warehousing, and wholesale trade activities;</p>	<p>characteristics that warrant a location in an industrial area should not be permitted.</p> <p>(3.12.2) h) General commercial, and convenience or service commercial uses may be established within areas designated Industrial land use to provide services to workers within the industrial areas of the City and to those who may be passing through, provided that such developments are generally limited in scale and do not detract from the general purpose of such areas to provide for intensive industrial activities.</p> <p>i) The lands located in the industrial area west of Sidney Street along Bell Boulevard are designated an enterprise zone as defined in this Plan, wherein a broad range of uses (including certain compatible commercial uses) may be permitted in addition to industrial uses.</p>	<p>contractor yards, maintenance yards, salvage yards, utility functions, and public works depots or other similar industrial uses and activities.</p> <p>Uses permitted also include ancillary service related uses and offices, wholesale and retail functions directly related to industry. In addition, limited commercial, community and recreational facilities, open space, eating establishments, police stations, firehalls, fraternal organizations, athletic clubs, daycare facilities, or other similar uses may be permitted provided the use is compatible with the industrial uses in the area and in no way will contribute to the detracting of the area for healthy industrial development.</p>		<p>immediately adjacent to residential uses. Lighter industrial uses, which do not require obtrusive and extensive outdoor storage, and which will not emit noxious fumes, discharge or excessive noise, are suitable in this zone.</p> <p>(HEAVY INDUSTRIAL) 5. Establish a Heavy Industrial zone of which uses in this zone could have a detrimental visual or physical effect on adjacent uses, particularly residential land use. Certain types of manufacturing, large scale factories and assembly plants, uses which emit considerable noise, or require heavy trucking and traffic movement, should all be included in this category. Special attention shall be given to the buffering of such industries from other uses, and to the accommodation of industrial traffic flows.</p> <p>(EXTENSIVE INDUSTRIAL) 6. Consider establishing an Extensive Industrial zone which will include industrial uses requiring extensive outdoor space for storage of vehicles, equipment, or materials, but not engaged in heavy manufacture or assembly. These types of activities are generally incompatible, not only with residential areas, but also with planned industrial parks. In addition, these uses may not require full municipal servicing. Such uses shall be grouped wherever possible in special areas where an important consideration shall be screening and buffering from other land uses. Areas where full municipal servicing is not feasible or only feasible over a long term, may also be considered for extensive industrial uses.</p> <p>(ALL) 25. Permit service commercial uses (such as restaurants, banks and offices) and recreation facilities in industrial areas subject to the following criteria: a) the uses do not have an adverse</p>

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	<p>d. communications facilities and utilities;</p> <p>e. automotive, heavy equipment, and truck repair facilities, and towing compounds;</p> <p>f. institutional uses with General Industrial characteristics, as outlined in Section 3.5.3 of this Plan; and,</p> <p>g. municipal works yards and water treatment and sewage treatment facilities, subject to the policies of Section 3.2 of this Plan.</p> <p>(Amended by By-Law No. 2011-89, O.P.A. #6)</p> <p>Complementary Uses:</p> <p>a. office and business service establishments, such as printing and equipment repair, which are intended to serve the General Industrial area;</p> <p>b. day care facilities;</p> <p>c. restaurants, financial institutions, personal services, and convenience commercial uses;</p> <p>d. automobile service stations or gas bars, if located at the intersection of arterial or collector streets;</p> <p>e. public and private parks and recreation facilities;</p> <p>f. parking lots and structures; and,</p> <p>g. sources of renewable energy, subject to the policies of the Section 6.2 of this Plan.</p> <p>(3.6.C) (WASTE MANAGEMENT INDUSTRIAL) "To locate and manage industrial uses that may have unpleasant operating characteristics in a manner that minimizes land use impact." Permitted uses:</p> <p>a. any facility established as part of a waste management program;</p> <p>b. waste transfer facilities;</p> <p>c. recycling plants;</p> <p>d. composting facility;</p> <p>e. a sewage treatment facility;</p> <p>f. a landfill site or former landfill site;</p> <p>g. a wrecking or salvage yard, or a towing compound; and,</p> <p>h. community facilities, subject to the</p>				<p>impact upon established commercial areas;</p> <p>b) adequate parking is provided;</p> <p>c) the site is peripheral to the industrial area in which it is located and is in proximity to an arterial road;</p> <p>d) where feasible and practical, access to arterial roads shall be restricted and vehicular access will be oriented to collector roads interior to the industrial area;</p> <p>e) have a high quality of site design and through design features minimize adverse impacts on adjacent uses;</p> <p>f) in addition service commercial uses shall be subject to the following criteria:</p> <p>i) such facilities shall provide services primarily for the benefit of the industries and employees;</p> <p>ii) the uses should be located in industrial malls or on service centre sites.</p> <p>27. Permit uses which have characteristics or functional requirements similar to industries, such as public utilities, communication facilities, public works yards, heavy equipment storage, sales and rentals and other similar uses to locate within industrial designations.</p> <p>28. Allow a limited amount of office development in Industrial areas in addition to office space provided as accessory to a permitted main use of land. Such office developments shall only be permitted by amendment to the Zoning By-law. The City may direct that such office development be located only within certain areas in the area designated "Industrial" and may also establish maximum floor area for any such developments. Such office development shall include buildings of a high standard of architecture and site design. In evaluating such applications, the applicant may be asked to demonstrate to the City why suitable office space is not available in established Business Districts or other</p>

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	policies of Section 3.2 of this Plan. Complementary Uses: a. parking lots and structures; and, b. sources of renewable energy, subject to the policies of the Section 6.2 of this Plan.				appropriately zoned areas. The applicant shall also demonstrate why it is more appropriate to locate the office space in an industrial area rather than elsewhere. Specific office locations in industrial areas may also be designated in secondary plans and the Zoning By-law may be amended to reflect such designations.
Development Criteria	(3.6.14) Within areas of employment development is subject to the following requirements: a. rationalization of the land ownership pattern is encouraged through land assembly, subdivision and consolidation to create parcels of a size and configuration appropriate to contemporary industrial requirements; b. providing road access to individual landholdings is a primary consideration in the context of re-organizing the ownership pattern and facilitating the transition of vacant or underutilized lands to full industrial capability; c. plans of subdivision are the preferred means of land division in implementing the policies of this Section; d. access to each property is by way of clearly indicated access points that will facilitate entry and exit, particularly by highway transport vehicles; e. each site must provide convenient and safe access for pedestrians and vehicles, accommodate transit and cyclists, and connect on-site walkways with the public sidewalk system, and with adjacent public spaces and trails, where feasible; f. loading areas must be screened from abutting non-industrial uses, separated from vehicle and pedestrian traffic, and located in interior side yards or rear yards; g. parking is to be provided in accordance with Section 4.6 of this Plan, designed in such a manner as to minimize conflicts between vehicles and	(3.12.2) a) This Plan encourages diversification of the types and sizes of industrial activities in the City. Industrial uses should be permitted on lots of all sizes; for each lot, there should be sufficient area provided to accommodate buildings, parking and loading areas, and landscaping. Uses may be permitted either as a single use on a lot or in concert with other uses on the same lot, such as industrial malls or plazas. b) Certain lands designated Industrial land use are located immediately adjacent to residential areas or land uses that can be sensitive to the impacts of industrial activity. In such areas, the range of uses should be limited to service industrial uses which are less likely to cause significant off-site impacts. Industrial uses considered obnoxious may be prohibited from being established in the community, or alternatively may be directed to areas that are secluded and located considerable distance from areas that may be impacted by such uses. c) Where industrial development is proposed adjacent to lands designated or used for sensitive land uses such as residential development, the Municipality should determine, using the Ministry of Environment’s guideline on compatibility between industrial facilities and sensitive land uses, the separation distances or mitigative measures that should be employed to reduce the potential of land use conflict. Separation distances may vary depending upon the nature of the	(4.6.3.3) Industrial lands are designated in areas of direct accessibility to existing and proposed arterial and collector roads. Industrial areas shall be designed so as to discourage the penetration of traffic generated by industry into or through areas of sensitive land uses. Industrial uses should comply with the Ministry of Environment guidelines respecting compatibility between industrial facilities and sensitive land uses. Industrial development is to be serviced by a piped water supply and a sanitary sewage collection system. Lands designated industrial on Schedule ‘A’ located in Concession 5 of the former Township of Richmond, may be developed for industrial uses of a dry nature. Industries of a dry nature shall mean those industries where water is not necessary in the manufacturing, processing and/or fabrication of goods and materials and which industries have no demands for water supply and sewage disposal beyond those requirements normally associated with the needs of employees and/or visitors. In approving such industries, Council may require the submission of a hydrogeological report with respect to the adequacy of groundwater supplies and the ability of the soils to sustain development on the basis of private services. Industrial areas are to be planned and developed in such a manner that light, non-noxious industries are located at the interface of heavy industrial uses with other forms of land use.	(4.7.3) It shall be the policy of the City that: 1. Those uses that create or potentially create extreme environmental stress as a result of air, odour, noise, and/or vibration emissions, and/or the generation and/or handling of solid or liquid wastes shall only be considered if they meet the MOE Guidelines and an impact assessment is submitted that is satisfactory to the City. 2. Industrial uses located adjacent to a Highway 401, an Arterial road or Collector road, shall generally be limited to self-contained uses that produce and/or store a product where there is a low probability of significant emissions. 3. Where development fronts on, or abuts an Arterial or Collector Road, uses shall be limited to prestige employment uses. 4. Industrial uses that require open storage of goods and materials such as manufacturing, processing, assembling, repairing, wholesaling, warehousing, trucking and storage shall be permitted, however, the open storage shall be screened such that it is not visible from a Highway 401, an Arterial Road, or a Collector Road. 5. For uses that exhibit any or all of the following characteristics, a study shall be prepared in accordance with the relevant MOE Guidelines to demonstrate that the proposed use is compatible with any nearby potentially incompatible or sensitive uses: i. outdoor storage of goods and materials; ii. frequent shipment of products	(4.8.3) (SERVICE INDUSTRIAL) 3. Ensure that Service Industrial zone developments have regard for and adhere to good design, location and performance concerns such as: a) no open storage shall be permitted; b) architecturally designed buildings with attractive exteriors and sensitive selection of exterior materials; c) substantial landscaping is provided on the site; d) locations in high visibility areas adjacent to highway or major arterial streets; e) appropriate and paved off-street parking and loading areas; f) locations in areas to act as a buffer between residential and other industrial zones. (ALL) 7. Ensure that all industry is on full services with the exception of those uses permitted in the Extensive industrial zone. 8. Encourage the infilling of existing industrial parks and give priority to the north-east industrial park as the major area for future industrial expansion. 9. Generally restrict the expansion of/or establishment of scattered industrial development. 10. Stage future development of industrial parks and use holding zones where appropriate. 17. Encourage a high standard of development and maintenance in industrial parks and properties and provide adequate buffers or screening where an industrial site abuts

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	<p>pedestrians, and wherever possible, should be screened and located in interior side yards or rear yards;</p> <p>h. the design of new industrial buildings must be compatible with, and sensitive to, the characteristics of the existing surrounding development, and must take into consideration the existing natural constraints and features on the site;</p> <p>i. industrial buildings must be designed and constructed to a finished standard with appropriate exterior cladding on all sides facing a road, a freeway or an abutting non-industrial use;</p> <p>j. the design of new industrial buildings must be appropriate in terms of scale, character, and design elements, including well-defined main entrances that are oriented to the public road, roof form and articulation, and the use of high quality exterior materials that are compatible with surrounding uses;</p> <p>k. service facilities and mechanical equipment must be designed and located with minimal visual impacts on surrounding properties, and for maximum safety for employees and the public;</p> <p>l. adequate screening and buffering in the form of fencing, berming and landscaping is required to minimize potential impacts between the proposed industrial use and neighbouring properties, particularly any adjacent Residential, Commercial, Institutional, or Environmental Protection Area designations;</p> <p>m. landscaping must be designed to enhance the overall aesthetic quality of each site, and where a site is adjacent to a natural heritage feature or area, special attention must be given to the landscape design in order to enhance and protect natural features and minimize adverse effects;</p> <p>n. facilities for managing solid waste must be located within an enclosed structure sited away from the street or</p>	<p>proposed industrial use and the sensitive land use.</p> <p>Where an existing industrial land use is located in close proximity to sensitive land uses, the Municipality should encourage the establishment of mitigative measures to reduce the impact of the industrial use on adjoining land uses (i.e. fencing, landscaping, berming, limited building fenestrations oriented towards the sensitive land uses). The Municipality should attempt also to protect such industrial uses from further development of incompatible land uses in close proximity to the industrial use that would increase the degree of incompatibility, and employ appropriate mitigative measures (i.e. setbacks, berming, screening and landscaping, fencing).</p> <p>d) Dry industrial uses may be permitted without connection to full municipal services (sanitary sewer and water) where it can be demonstrated that such a use can be appropriately developed without connection to full municipal services; care should be exercised in such situations to ensure adequate road access and soft services (i.e. police and fire protection) can be provided to the development.</p> <p>Generally, this would only be employed to accommodate small enterprises or space extensive uses (i.e. trucking depots or storage yards, recycling uses, and contractors yards), and similar, where such uses do not require access to full services, and where municipal services are not yet available and are not intended to be extended to such lands in the immediate future.</p> <p>e) All industrial uses should meet the guidelines and requirements of the Ministry of Environment with respect to solid and liquid waste disposal and all emissions to the environment.</p> <p>f) Adequate off-street parking should be provided to accommodate employee parking requirements. Adequate off-street loading facilities should also be</p>	<p>New industrial development or the redevelopment of existing industrial sites in close proximity to sensitive uses should be restricted to light industrial uses and related activities which exhibit reasonably high performance standards in order to provide for a degree of compatibility between the sensitive uses and industrial uses. The degree to which industrial uses are to be separated from sensitive land uses and the requirements for buffering will depend upon the nature of the industrial use and adjacent sensitive land use.</p> <p>To protect the visual amenities of the Loyalist Parkway, Council shall establish appropriate provisions in the implementing Zoning By-law and any Site Plan Agreements to regulate the setback of buildings and structures from the Highway and to visually screen outside storage and parking areas. The lands which are designated as industrial on the south side of Highway No. 33, adjacent Lake Ontario, shall be limited in the type and nature of uses allowed. The intent is to ensure future water access for the Lennox Industrial area and to retain the view of Lake Ontario from the Loyalist Parkway to as great an extent as possible. Only facilities directly associated with waterfront use such as industrial docking facilities, pump houses, and other minor industrial buildings shall be located in this area. Major industrial buildings and permanent storage facilities shall be located north of the Loyalist Parkway. No industrial use shall be permitted which, from its nature of operation or materials use therein, is declared to be noxious under the provisions of the Health Promotion and Protection Act or regulations thereunder.</p> <p>Adequate off-street parking and loading facilities shall be provided, inclusive of parking for visitors and employees. Ingress and egress points to such areas shall be limited in number and designed in a manner which will minimize the</p>	<p>and/or materials;</p> <p>iii. long production hours and shift operations/unusual hours of operation;</p> <p>iv. large volumes of traffic at off-peak hours; and/or</p> <p>v. likelihood of nuisances, such as noise, odour, dust, lighting or vibration.</p> <p>6. An appropriate separation distance, based upon the relevant MOE Guidelines related to land use compatibility, shall be established between an industrial land use and any sensitive land use. This separation distance shall be enforced through a site-specific amendment to the Zoning By-law and site plan control through the use of a minimum building setback applied to any industrial use adjacent to an established or approved sensitive land use.</p> <p>7. Deviation from established separation distances shall require detailed supporting studies of the potential impacts on the sensitive land use by the Industrial use, and vice-versa, and any recommended mitigation measures.</p> <p>8. Separation distances between sensitive land uses and industrial uses, or for industrial uses abutting Highway 401, Arterial roads, or Collector roads shall be implemented through the Zoning By-law, as a condition of draft plan approval and/or through site plan control and may include measures such as:</p> <p>i. building orientation, design and setbacks;</p> <p>ii. landscaping and screening;</p> <p>iii. access controls;</p> <p>iv. road improvements and widenings;</p> <p>v. restrictions on the range of permitted uses; and</p> <p>vi. restrictions on outside storage.</p> <p>9. Adequate off-street parking and loading facilities shall be provided for all permitted uses for employees and visitors. Vehicle access shall be oriented such that industry-related traffic shall be discouraged from using local roads where other options are available.</p>	<p>residential, open space or other conflicting land uses.</p> <p>Where industrial areas adjoin residential districts, the City shall use or require appropriate techniques such as landscaped buffering and screening, increased setbacks, prohibition of open storage, and restriction of the abutting property to service industrial uses.</p> <p>20. Recognize that older central city industrial buildings can act as "incubators" for new industries and encourage rehabilitation of such buildings where appropriate.</p> <p>21. Stage the servicing and development of new industrial areas in a manner which is consistent with the demand for such lands. The City shall develop a program to monitor the consumption of industrial land and determine an adequate reserve of industrial land. The City shall ensure that financing for the necessary capital facilities to new industrial lands or property acquisition is incorporated into the Capital Budget.</p> <p>22. Encourage industries with similar characteristics to group together to ensure that the existence of more intensive industry by way of emission of smoke, odour, noise and vibration will not be to the detriment of lighter industries. The City shall attempt to create industrial sub-districts within industrial parks.</p> <p>23. Encourage those industrial uses requiring outdoor storage to locate in the interior of an industrial area, in locations of low visual prominence.</p> <p>24. Locate truck terminals in industrial areas with access to regional roadway facilities and arterial roads and ensure adequate screening of parking and storage areas. Truck terminals may also be considered for Extensive Industrial zones.</p> <p>26. Require that uses within industrial areas abutting incompatible non-industrial uses meet the following criteria:</p>

	City of Kingston Official Plan, 2010	City of Belleville Official Plan, 2002	The Official Plan of the Town of Greater Napanee, 2002	City of Brockville Official Plan, 2012	City of Cornwall Official Plan, 2002
	<p>an abutting non-industrial use, and constructed in such a manner that the waste material is not visible from the street or an adjacent non-industrial property;</p> <p>o. outdoor storage of goods or materials must be fenced and screened and will not be permitted in the Business Park Industrial designation;</p> <p>p. industrial uses requiring large amounts of open storage, and those characterized by noise, odour and vibration, are restricted through the zoning by-law from locating near non-industrial areas;</p> <p>q. exterior lighting of any building or parking area is to be designed to deflect glare from adjacent properties;</p> <p>r. a stormwater management plan prepared in conjunction with a development application must address the quality and quantity of stormwater as required by Section 4.3 of this Plan;</p> <p>s. high quality design treatments, based on the policies of Sections 3.6.A.5 and 8 of this Plan, are expected of any industrial facility located adjacent to non-industrial uses, on all lands designated as Business Park Industrial, and on any of the major gateways into the City, including Highway 401, Gardiners Road, Sir John A. Macdonald Boulevard, Division Street, Montreal Street, and Highway 15; and,</p> <p>t. all development applications are subject to site plan control review.</p>	<p>provided. Outdoor storage areas should be appropriately buffered from adjacent roads and properties that may be impacted by such areas through use of landscaped strips, plantings of trees, and berming.</p> <p>j) Within certain areas designated Industrial land use that have not yet been developed, natural drainage courses, wetlands and natural areas exist. When development of these areas is proposed, this Plan encourages the retention of such areas in their natural state. However, where site modification is necessary, steps to mitigate environmental impacts of developing such areas should be incorporated in development plans; new planting areas, engineered wetlands, and naturalized drainage courses are among the options that should be considered.</p> <p>k) Certain of the lands designated Industrial land use are used for railway purposes, either as rail corridors, spur lines or marshalling yards, together with maintenance and support uses. The following policies apply to areas designated Industrial land use which are used for railway purposes:</p> <p>i) Railway corridors should be buffered from adjacent non-compatible land uses as much as possible through such measures as landscaped strips, berms, plantings of trees, and fencing.</p> <p>ii) Care should be exercised at all level crossings to maintain good sight lines to protect public safety and to enable rail operations to continue with as much security as possible.</p> <p>iii) As railway corridors and marshalling yards are a major source of noise and vibration, the policies of this Plan set out in Section 7.7 should be applied in new developing areas where development that may be subject to the impacts of rail operations is proposed in close proximity to railway lands.</p> <p>iv) Should any railway corridor be abandoned, the Municipality should</p>	<p>danger to both vehicular and pedestrian traffic.</p> <p>On the lands designated industrial immediately to the north of the shoreline of the Napanee River along Water Street, the uses permitted are restricted to that of a water pollution control plant.</p>	<p>Loading facilities and service areas shall be located to avoid conflict between pedestrian circulation, service vehicles and movement along the public rights-of-way and visibility from roadways.</p> <p>10. The provision of appropriate and adequate landscaping and/or other forms of buffering shall be provided to:</p> <p>i. enhance all parking lots, and outdoor loading, storage and service areas; and</p> <p>ii. provide separation between the use and any adjacent use, where appropriate.</p> <p>11. Industrial uses shall be developed in such a manner to ensure protection and screening of outdoor storage areas from all adjacent roads.</p> <p>12. Access to an Arterial, Collector, or Local road shall require approval from the City.</p> <p>13. A high standard of site design and maintenance shall be required through site plan control in accordance with Section 6.4.6.</p> <p>14. Existing uses within the "Future Employment" overlay shall be managed within the policies of the underlying land use designation; however, no new development that would preclude the expansion of the employment areas shall be permitted. Any new development within the Future Employment overlay shall necessitate the preparation of a Secondary Plan in accordance with policies in Section 3.2.5 and 6.4.1.</p>	<p>a) no outside storage shall be used;</p> <p>b) applicable air pollution, odour, and noise requirements;</p> <p>c) the development meets a high standard of building design, and landscaping. The City may restrict the abutting sites to Service Industrial uses.</p>

	City of Kingston Official Plan, 2010	City of Belleville Official Plan, 2002	The Official Plan of the Town of Greater Napanee, 2002	City of Brockville Official Plan, 2012	City of Cornwall Official Plan, 2002
		endeavour to acquire the right-of-way or otherwise assure its protection as an open space corridor for such activities as recreation trails, service corridors, and transportation linkages. Where no appropriate use for an abandoned rail corridor is determined and acquisition of the corridor by the Municipality is not undertaken, the rail corridor may be used for uses consistent with adjoining land use designations in this Plan without amendment to this Plan.			
Site Plan Control Required	(3.6.14) Yes	(8.2) Yes	(8.7) Yes	Yes	(9.6) Yes
Urban Design Requirements	(3.6.A.5) (BUSINESS PARK INDUSTRIAL) Yes (GENERAL INDUSTRIAL, WASTE MANAGEMENT INDUSTRIAL) No	(7.6.4) Yes, general provisions, not specific to industrial uses.	(4.6.6) No.	Yes, through landscaping and (6.4.6) site plan control requirements.	(4.8.3) (SERVICE INDUSTRIAL) Yes (All) Somewhat (bullet 17)
Development Permit System Enabled	(9.5.12) Yes	No	No	(6.4.7) Yes	No

Table D2: Employment Land Policies

	City of Kingston Official Plan, 2010	City of Belleville Official Plan, 2002	The Official Plan of the Town of Greater Napanee, 2002	City of Brockville Official Plan, 2012	City of Cornwall Official Plan, 2002
Employment Land Supply	(3.6.4) The City will take an active role in preserving areas of employment for future job growth. A sufficient supply of land designated for employment uses must be maintained within the Urban Boundary in order to meet anticipated short and long-term needs, including an adequate supply of serviced land and an allowance for choice in terms of location, size of property, and servicing needs.	(2.2.8) This Plan will endeavour to ensure the availability of sufficient industrial and commercial land with access to full municipal services and public and private transportation systems in the urban serviced area to meet a wide range of development needs.	Not specified.	(6.2) This plan is based on a 20-year planning horizon to the year 2031, which principally relates to the population and employment projections and designated land supply. The effect of most of the land use policy shall have implications well beyond the 20-year timeframe and shall accordingly represent a long-term commitment.	(4.8.2) 1. Ensure sufficient land and services to accommodate and attract future industrial/business development. 2. Provide industrial/business sites of sufficient size and appropriate facilities. 3. Ensure attractive industrial/business developments and industrial/business parks.
Considerations for Designating New Areas	(3.6.A.4) (BUSINESS PARK INDUSTRIAL) Proposals for new Business Park Industrial designations must meet one or more of the following locational criteria: a. frontage on a major road;	None specified. (8.12.3) Official Plan Amendments (General) Applications to amend this Plan may be submitted to Council for consideration. b) As a pre-requisite to the consideration of any application to	(4.6.3) This Plan designates lands as industrial where: <ul style="list-style-type: none"> industry presently exists; industrial designations already exist; there is potential for expansion of industrial uses while having regard 	(3.2.5.6) 6. A proposal to expand the boundaries of an Employment Area shall only be considered through a comprehensive review of this Plan. A comprehensive review is an Official Plan review which may be initiated at any	(4.8.2) 5. Ensure that existing industrial/business parks are substantially developed prior to the expansion or development of new industrial/business areas. (4.8.3)

	City of Kingston Official Plan, 2010	City of Belleville Official Plan, 2002	The Official Plan of the Town of Greater Napanee, 2002	City of Brockville Official Plan, 2012	City of Cornwall Official Plan, 2002
	<p>b. high visibility in relation to a major transportation corridor; c. a location where adjacent natural features will reinforce the high quality landscaped setting; and/or, d. a location on the periphery of an area of employment, not internal to it.</p> <p>(GENERAL INDUSTRIAL) None Specified</p>	<p>amend this Plan, the Municipality may require the applicant to submit those studies that are considered necessary to enable the application to be properly assessed, which may include:</p> <ul style="list-style-type: none"> • assessment of servicing implications; • analysis of soil, subsoil and groundwater conditions (geo-technical and hydro-geological studies); • environmental impact studies (E.I.S.); • environmental site assessments (for potentially contaminated sites); • noise and vibration assessments; • traffic studies; • market and needs surveys; • stormwater management studies; and • assessments of financial impact. 	<p>to the physical characteristics of the land;</p> <ul style="list-style-type: none"> • the nature of adjacent land uses is compatible; • the level of existing and proposed services can accommodate the use; • infrastructure serving the area is expandable; • this extends lands presently zoned for industrial purposes; and • there is ability to provide for intensification of industrial uses through the rationalization of the land use pattern. 	<p>time by the City or an Official Plan Amendment which is initiated or adopted by the City in accordance with the policies of Section 6.3, and where it is demonstrated that:</p> <ol style="list-style-type: none"> i. sufficient opportunities for appropriate employment growth are not available through designated employment areas to accommodate projected needs over the planning horizon within the City, or sufficient opportunities for growth are not available through designated employment areas to accommodate projected regional needs as a result of locational or economic considerations; ii. opportunities for intensification, infill and redevelopment have been explored, and accounted for in evaluating alternatives to an Employment Area expansion; iii. the amount of land included within the expansion area is justified based upon the amount and nature of land available for development within the City as a whole and the Employment Areas on an individual basis, the employment projections for the City, and the intended role of the Employment Area; iv. the proposed expansion is a logical extension of the Employment Area and will be provided with full municipal water, wastewater and stormwater management systems, to the satisfaction of the City; v. the proposed expansion has regard for the appropriate separation of incompatible sensitive land uses; vi. the land is physically suitable for development, considering any constraints, such as Hazard Lands and Natural Heritage Features; vii. the transportation network can reasonably accommodate the additional volume of traffic and demand for services; viii. suitable community and public facilities are available, or can be 	<p>11. Encourage new industrial development to locate in planned industrial parks except:</p> <ol style="list-style-type: none"> a) where it can be demonstrated that it is not desirable or suitable for the use to locate in an industrial park, and b) where the use has a special locational requirement that can only be met in a particular area, and c) where no adverse impacts occur on adjacent areas and no excessive municipal improvement costs would result. <p>13. Use the following criteria to evaluate the location of new industrial/business parks or proposed expansion of existing industrial parks:</p> <ol style="list-style-type: none"> a) proximity to regional transportation facilities such as rail and major highways; b) relatively flat sites with good surface drainage; c) favourable soil conditions; d) compatibility of adjacent development and facilities; e) availability of utilities and proximity to trunk sewer and water lines; f) suitable shape and size of sites, including room for expansion; g) locations to discourage traffic penetration into residential areas.

	City of Kingston Official Plan, 2010	City of Belleville Official Plan, 2002	The Official Plan of the Town of Greater Napanee, 2002	City of Brockville Official Plan, 2012	City of Cornwall Official Plan, 2002
				<p>provided to accommodate the expansion area;</p> <p>ix. a suitable plan for phasing, financing and construction of the infrastructure for the expansion area is developed;</p> <p>x. the proposed expansion shall not negatively impact cultural heritage resources. The City may require a Heritage Impact Assessment when development is proposed adjacent to a cultural heritage resource that is designated or listed in the Municipal Registry of Cultural Heritage Resources, or within or adjacent to a Heritage Conservation District; and</p> <p>xi. considers cross-jurisdictional issues.</p>	
Conversion of Employment Lands	<p>(3.6.5) Proposals for the redesignation of lands for uses other than those permitted in areas of employment, or to add a range of uses to an area of employment that are primarily permitted in another land use designation, will not be approved unless it has been demonstrated to the satisfaction of Council that the land is not required for employment area uses over the long term, and that there is a need for the redesignation. The following criteria will be considered as part of the assessment of whether the proposed redesignation is appropriate:</p> <p>a. the proposal will only be considered in conjunction with a review that addresses the following matters to the satisfaction of Council:</p> <ul style="list-style-type: none"> the proposal will not detrimentally affect the short and long term employment area land supply of the City, the supply of serviced land, or jeopardize the City's capacity to meet its long term requirements for areas of employment; the intensity, characteristics and impacts associated with the proposed use will not detrimentally impact the viability, desirability, or the proper servicing of existing and future 	<p>See general requirements above. (3.12.2)</p> <p>g) Small and isolated parcels of land designated Industrial land use located in predominantly residential areas may be redeveloped for residential purposes in accordance with the policies of Section 3.10 without amendment to this Plan provided that prior to such development being permitted, Council determines that:</p> <ul style="list-style-type: none"> should industrial use remain, land use conflicts could be unreasonably disruptive to the enjoyment of the residential area; and environmental contamination issues (if any) have been or will be resolved to the satisfaction of the Municipality in accordance with guidelines established by the Ministry of Environment. 	<p>General Requirements for OP Amendments: (8.16)</p> <p>Council may amend this Plan to reflect changing conditions, or amend the Plan as deemed necessary to keep abreast of changes and trends whether originating within the Town or beyond the Town boundaries.</p> <p>The Official Plan may also be amended based upon decisions made by Council regarding specific requests. When considering a specific request for amendment, Council will have regard to:</p> <ol style="list-style-type: none"> the need for the use; alternative locations for the proposed use; compatibility of the use with surrounding uses; impact on resources; impact on natural heritage features; the adequacy of water supply and sewage disposal services required by the proposed use; vehicular and pedestrian access; and financial impact on the municipality. 	<p>(3.2.5.7)</p> <p>7. Employment Areas shall be protected and preserved for employment uses and the City shall discourage the conversion of Employment Areas for other uses. The conversion of lands from Employment Areas to non-employment uses shall only be considered through a comprehensive review of this Plan, and only where it is demonstrated that the land is not required for employment purposes over the long-term and that there is a demonstrated need for the conversion. A comprehensive review is an Official Plan review which may be initiated at any time by the City or an Official Plan Amendment which is initiated or adopted by the City in accordance with the policies of Section 6.3, and where it is demonstrated that:</p> <ol style="list-style-type: none"> the location of the employment lands do not satisfy the contemporary or future economic needs of the City; the total amount of land designated Employment Area in the City shall not substantially decrease, in total, as a result of a redesignation; the land proposed for redesignation should be on the periphery of an Employment Area and the revised boundaries shall be logical and appropriate for the area, and shall 	<p>None Specified. (14.3) (OFFICIAL PLAN AMENDMENTS– General)</p> <p>Requests for changes to the Land Use Schedule shall be evaluated against some or all of the following general criteria:</p> <ol style="list-style-type: none"> conformity with the overall intent, philosophy, goals, principles and policies of the Official Plan; suitability of the location of the site or area for the proposed land use category, especially in relation to other sites or locations in the City; compatibility of the land use classification with adjacent designations; the need and, when deemed appropriate, market feasibility for the proposed use; the extent to which existing designated areas are developed or available for development; the impact of the proposed use on municipal services, treatment facilities and utilities, the transportation system, community facilities and the natural environment; the need to maintain an orderly development pattern; the economic benefits to the City; the financial implications (costs and

	City of Kingston Official Plan, 2010	City of Belleville Official Plan, 2002	The Official Plan of the Town of Greater Napanee, 2002	City of Brockville Official Plan, 2012	City of Cornwall Official Plan, 2002
	<p>surrounding land uses;</p> <ul style="list-style-type: none"> the site's physical and natural characteristics, development constraints, and location will justify the consideration of non-employment uses on the subject lands; and redesignation of areas of employment abutting major transportation corridors, including railways, highways and major arterial roads is discouraged; and, <p>b. in addition to subsection a. above, the proposed redesignation must meet the following conditions:</p> <ul style="list-style-type: none"> the amount of land affected is minor in area based on the projected employment area land requirements within the planning horizon of this Plan; the development of the subject lands is demonstrated to the satisfaction of Council not to be feasible for employment area uses within the planning horizon of this Plan; there are no alternative sites, designated and approved for the proposed use elsewhere in the City; the proposal will have a beneficial impact on the surrounding uses and broader community; and, the development of the subject lands for non-employment uses will meet a public need identified by Council resolution. <p>(Amended by By-Law No. 2013-98, O.P.A. #16)</p>			<p>provide opportunities to minimize incompatibility between land uses;</p> <p>iv. the proposed redesignation shall not jeopardize the planned role and function of other land use areas and shall not set a precedent for further redesignation;</p> <p>v. there shall be a demonstrated need for the proposed use(s);</p> <p>vi. the proposed use(s) shall not negatively impact the viability and stability of any of the remaining Employment Areas in the long-term;</p> <p>vii. the new development shall be compatible within the context of the surrounding existing development in scale, height and built form;</p> <p>viii. the density and massing of new development shall complement the existing built form context;</p> <p>ix. the new development can be integrated and linked into the fabric of the surrounding community, where appropriate (e.g. through the provision of public streets, pedestrian walkways and the location of public parks);</p> <p>x. the continued operation of the existing Employment Area which remains in the area of a redevelopment can be encouraged through measures such as the phasing of development, the provision of on-site building setbacks, landscaped areas, intervening facilities, building and fencing, and the protection of trucking routes and driveways;</p> <p>xi. that full municipal water, wastewater and stormwater management systems and transportation systems can be provided to meet the needs of the area, to the satisfaction of the City;</p> <p>xii. subject to the other policies of the Plan in this regard, the environmental conditions of the development area shall be suitable for the proposed land use(s); and</p> <p>xiii. considers cross-jurisdictional issues.</p>	<p>revenues) to the Municipality;</p> <p>j) comments from City Departments and public agencies;</p> <p>k) precedents created by the amendment.</p>

Table D3: Rural Industrial Policies

	City of Kingston Official Plan, 2010	City of Belleville Official Plan, 2002	The Official Plan of the Town of Greater Napanee, 2002	City of Brockville Official Plan, 2012	City of Cornwall Official Plan, 2002
Rural Industrial	<p>(3.13.19) Small-scale industrial and commercial uses in the Rural designation can provide a modest means of starting a business. The businesses that grow are expected to move to more urban settings. Other businesses may employ local craftsman or artisans and remain small. Such businesses may be permitted in the Rural designation provided the uses are limited in size and do not have adverse effects on adjacent land uses through noise, vibration, reduction of privacy, traffic or other impact or hazard. New small-scale industrial and commercial uses are allowed by an amendment to the zoning by-law. Such amendments must set out specific limits on use, size, location and number of employees. All new small-scale industrial and commercial uses in the Rural designation are subject to the Site Plan Control By-law in accordance with the Planning Act.</p> <p>(3.16) Goal: "To support the rural agricultural communities by allowing limited industrial development in appropriate locations."</p> <p>(3.16.1) Small scale industrial uses in the Rural designation are permitted under the policies of Section 3.13.19 of this Plan. Existing larger scale rural industrial uses are designated as Rural Industrial on Schedule 3 of this Plan. Any new larger scale industrial use proposed outside of the Urban Boundary will be subject to an amendment to this Plan as a Rural Industrial designation, as set out in the following policies.</p>	<p>(3.1.2) (HAMLETS) b) Light industrial uses permitted in Hamlets should be restricted to uses that do not: <ul style="list-style-type: none"> require large quantities of water; pose problems for the disposal of wastes; or create problems from smoke, dust, noise or similar obnoxious features. c) Commercial and industrial uses should be compatible with surrounding uses, both existing and proposed, particularly with regard to appearance, traffic generation potential, noise and any other potential nuisance features. f) All new commercial and industrial development should recognize and respect the historical or built heritage of the Hamlet; new development should be compatible with the historical scale, function, aesthetics and streetscape of the Hamlet. g) Adequate buffering should be provided between the commercial or industrial use and any adjacent residential areas. h) Large scale or extensive areas of open storage of goods or materials should be discouraged.</p> <p>(3.3.4) (RURAL) a) While the majority of commercial/ industrial development would be directed to the urban serviced area and Hamlets, there may be a need for small scale commercial/ industrial development in the Rural area.</p>	<p>(4.3.2.6) (AGRICULTURE) a) Commercial and industrial uses are encouraged to locate in areas designated commercial or industrial so as to retain the integrity of Agricultural lands and to promote the continuation of viable centers. b) Small scale commercial and industrial uses related directly to agriculture may be permitted. (4.7.2) (HAMLETS) Commercial and industrial uses permitted in Hamlets are those considered compatible with the existing and planned residential function and do not require large amounts of water. For purposes of this Plan, it is intended such commercial or industrial uses be restricted to uses where the water required is only that for domestic purposes. The separation of commercial and residential uses and buffering required will depend on the uses involved.</p> <p>Service industrial uses which are not obnoxious or detrimental to the residential environment of the hamlets and which are considered dry industries will be permitted.</p>	Not Applicable	<p>(4.9) 7. Ensure that non-agricultural uses that are permitted in the Zoning By-law such as low density recreational and institutional uses are located in the rural areas only where the following criteria can be met: a) adequate water supply is available, private sewage disposal facilities are feasible and other necessary services are available; b) adequate transportation facilities are available to provide required access, and traffic generation will not conflict unduly with urban traffic movements, especially at peak hours; c) proposed operations shall be compatible with existing agricultural operations and established non-farm activities in the same area.</p> <p>(4.8.3) (EXTENSIVE INDUSTRIAL) These types of activities are generally incompatible, not only with residential areas, but also with planned industrial parks. In addition, these uses may not require full municipal servicing. Such uses shall be grouped wherever possible in special areas where an important consideration shall be screening and buffering from other land uses. Areas where full municipal servicing is not feasible or only feasible over a long term, may also be considered for extensive industrial uses.</p>
Permitted Uses:	(3.16.3) The Rural Industrial designation is intended to permit larger scale industrial uses that do not require municipal water or sewer services, or that may be incompatible with other	(3.3.4) Also permitted would be agricultural and food processing plants, including cheese factories, builder's supply yards, bulk storage yards, contractor yards,	(4.3.2.6) (AGRICULTURE) These uses should be of a dry nature (consume small amounts of water). Such uses include retail stands for the	(3.2.7) Brockville has no designated rural area, instead has an "Urban Reserve Area": (4.10.1) The lands designated Urban Reserve	(4.8.3) Extensive Industrial zone which will include industrial uses requiring extensive outdoor space for storage of vehicles, equipment, or materials, but

	City of Kingston Official Plan, 2010	City of Belleville Official Plan, 2002	The Official Plan of the Town of Greater Napanee, 2002	City of Brockville Official Plan, 2012	City of Cornwall Official Plan, 2002
	<p>uses in the urban area. Permitted uses may include warehousing, processing, manufacturing, assembling, and outdoor storage. Retail and office uses that are clearly an accessory use to the primary Rural Industrial uses are also permitted.</p> <p>(3.16.4) Uses that require full municipal services are directed to locate within the Urban Boundary. However, it is the intent of this Plan to encourage the development of new industry that is “eco-friendly” in terms of its use of solar energy or wind energy, its minimization and pre-treatment of waste materials, and its ability to recycle waste products to create energy or be re-used as a component of manufactured or assembled goods. The City may seek to develop “eco-friendly industrial park” areas in which there is a mutually beneficial relationship between industries in the sharing of energy production or in recycling the waste of one industry into the production of products created by another.</p> <p>(3.16.4) Agriculture-related uses are permitted in prime agricultural and rural designations</p>	<p>transportation terminals, motor vehicle repair garage, saw mill and lumber yard, warehousing and other similar industrial uses; generally such uses would not include heavy water users.</p>	<p>sale of agricultural products produced on the farm unit, farm related commercial and farm related industrial uses that are small in scale, directly related to the farm operation and required in close proximity to the farm operation such as grain drying operations. Cheese plants and abattoirs are to be directed to designations other than Agricultural but maybe allowed in Agricultural designations if alternate locations are not available.</p>	<p>Area are required to accommodate future urban and employment uses outside of this Plan’s horizon and generally include future residential, commercial, employment, institutional, community-related uses, and parks and open spaces. Lands within the Urban Reserve Area have been designated through a comprehensive review to be required for future growth and development but are not considered to be part of the Urban Area. It is recognized that further planning studies are required to determine the preferred land use, community design, transportation and servicing policies.</p> <p>Permitted uses:</p> <ol style="list-style-type: none"> 1. The predominant uses of land shall be those uses existing and permitted on the date of adoption of this Plan, as well as agriculture uses and agriculture-related uses that are compatible with the surrounding Area or Employment Area, including: the growing of crops, including nursery and horticultural crops; forestry; 2. conservation uses and compatible uses. 3. Uses permitted within the Parks and Open Space Area shall be permitted. 3. Uses accessory to any of the permitted uses in the Urban Reserve Area shall be permitted. 	<p>not engaged in heavy manufacture or assembly.</p>
New Designations/Development Requirements	<p>(3.16.9) Any proposal for a new or expanded Rural Industrial designation will be assessed subject to the following considerations and provisions:</p> <ol style="list-style-type: none"> a. the location, wherever possible, must be on the least productive agricultural lands and on sites that will not hinder agricultural operations; b. a minimum lot size of one hectare must be provided, permitting adequate access, off-street parking, loading, individual on-site water and sewage services, setbacks, and buffering; c. the location and use must have minimal impact on natural heritage features and areas, as proven 	<p>(3.3.4) d) The following policies apply to rural commercial and outdoor recreation uses in areas designated Rural land use:</p> <ol style="list-style-type: none"> i) The use should be appropriate for the proposed location and be compatible with surrounding land uses. ii) Access to uses should be located to avoid creating any traffic hazard, with adequate off-street parking and loading spaces. iii) The use should be appropriately screened and buffered from adjacent lands with landscaping, fencing and/or distance separation as required. iv) Signage and outdoor storage of goods and materials should not detract 	<p>(4.3.2.6) d) The general principles to be considered in the development and zoning of agriculturally related commercial and industrial uses are:</p> <ol style="list-style-type: none"> i) no uses considered to be a health hazard under the Health Protection and Promotion Act shall be permitted; ii) requirements of the appropriate approval agency related to water supply, disposal of wastes and emissions including noise, dust and vibration are satisfied; iii) one residential unit may be permitted as an accessory use provided the residential use is located on the same lot as the commercial or industrial 	<p>Not Applicable. (4.10.3) Anticipated to be pulled into the urban boundary in the future, requires studies, and to develop on full municipal services.</p>	<p>(4.8.3) 11. Encourage new industrial development to locate in planned industrial parks except:</p> <ol style="list-style-type: none"> a) where it can be demonstrated that it is not desirable or suitable for the use to locate in an industrial park, and b) where the use has a special locational requirement that can only be met in a particular area, and c) where no adverse impacts occur on adjacent areas and no excessive municipal improvement costs would result.

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	<p>through an environmental impact assessment, which may be required by the appropriate agency; and, d. a residential unit as an accessory use may be permitted on the same lot, provided that no severance is created and such residential use meets the minimum distance separation formulae and the Ministry of Environment requirements for sensitive uses (D-6 Guideline).</p>	<p>from adjoining lands or be out of character with the setting. v) Appropriate servicing must be provided. vi) The use does not preclude or hinder aggregate extraction in areas designated Mineral Aggregate (licensed and reserve areas) according to the policies of Section 3.7.2 of this Plan. vii) It should be determined that no suitable sites to accommodate the use are available within the urban serviced area or Hamlets. viii) The lands to be utilized for the proposed use will be rezoned as per the Comprehensive Zoning By-law.</p>	<p>use and provided further that no future severance is permitted for the residential use. The proposed residential use must comply with the Minimum Distance Separation Formulae; iv) the physical structure of commercial buildings should be in keeping with the scale and form of buildings in the agricultural area; v) signage and outside storage of goods or materials will be controlled so as to minimize the visual impact of such uses from adjacent roads and properties; vi) adequate buffering shall be provided to a sensitive use.</p> <p>(4.7.2) (HAMLETS) Commercial and industrial uses are encouraged to locate in areas which are not predominantly residential or in the logical path of future residential development. Such uses will be encouraged to locate adjacent to existing commercial and industrial uses or where their adverse effects on surrounding uses will be minimized. One residential unit may be permitted as an accessory use in connection with a commercial or industrial use. New buildings are encouraged to locate at a setback compatible with surrounding development to ensure that buildings are located in a visually close, traditional relationship with the roadway. Parking is encouraged behind or beside buildings to screen the parking lot from the roadway. Appropriate lighting and signing shall be used. Buffering shall be provided where a commercial or industrial use abuts a sensitive use.</p>		

Appendix E – Zoning By-law Comparison of Permitted Land Uses

Appendix E: Zoning By-law Comparison of Permitted Land Uses

	Kingston	Kingston	Kingston	Kingston	Kingston	Cornwall	Cornwall	Brockville	Napanee	Napanee
	No. 76-26 (Kingston Township), BP-2	No. 76-26 (Kingston Township) M6-23	No. 76-26 (Kingston Township) M1-12	No. 76-26 (Kingston Township) M1-13	No. 32-74 (Township of Pittsborough) BP-1	City of Cornwall Zoning By-Law No. 751, 1969, MFR 40	City of Cornwall Zoning By-Law No. 751, 1969, MFR 20	City of Brockville Zoning By-Law No. 050-2014	The Zoning By-Law (02-22) of the Town of Greater Napanee (BP)	The Zoning By-Law (02-22) of the Town of Greater Napanee (M1)
Primary Permitted Uses										
Agricultural Use								X		
Auction Sales										X
Corporate Administrative Office	X								X	
Research and Development Facility	X				X	X	X	X	X	X
Laboratory					X	X	X	X	X	X
Data Processing	X				X					X
Computer Design and Development Facility								X		
Computer Services								X		
Call centre	X					X	X			
Contractor or tradesman's yard		X					X	X		
Contractor Facility								X		
Construction Facility			X					X		
Construction and service trades						X		X		
Tree cutting service								X		
Custom workshop/workshop								X		X
Artist Workshop								X		
Household Mover						X				
Business Office		X		X	X		(X)***	X		X
Professional Office		X		X			(X)***	X		X
Business Accelerator/Incubator								X		

	Kingston	Kingston	Kingston	Kingston	Kingston	Cornwall	Cornwall	Brockville	Napanee	Napanee
	No. 76-26 (Kingston Township), BP-2	No. 76-26 (Kingston Township) M6-23	No. 76-26 (Kingston Township) M1-12	No. 76-26 (Kingston Township) M1-13	No. 32-74 (Township of Pittsborough) BP-1	City of Cornwall Zoning By-Law No. 751, 1969, MFR 40	City of Cornwall Zoning By-Law No. 751, 1969, MFR 20	City of Brockville Zoning By-Law No. 050-2014	The Zoning By-Law (02-22) of the Town of Greater Napanee (BP)	The Zoning By-Law (02-22) of the Town of Greater Napanee (M1)
Dry Cleaning or laundry plant		X			X		X	X		
Fabricating Plant		X	X							X
Manufacturing Plant		X	X		X	X				X
Assembling Plant			X		X	X				X
Processing Plant		X	X							X
Industrial – Light (industry that is completely enclosed in the building and doesn't need to treat air or water prior to discharge)								X		
Machine Shop							X	X		
Welding Shop								X		
Newspaper Plant								X		
Industrial Service								X		
Warehouse		X	X		X	X	X	X	X	X
Public use	X	X		X	X		X		X	X
Transportation Facility			X				X	X		X
Freight Terminal						X	X			X
Taxi Depot							X	X	X	
Courier Service								X	X	
Storage			X				X			
Storage – self serve								X	X	X
Wholesale			X				X	X		X
Factory Retail Outlet							X		X	
Communications/utilities facility			X	X			X		X	X
Institutional uses with general industrial characteristics (trade school)				X		X				

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Commercial School					X		X	X	X	
Technical School					X	X	X			
Vocational School								X		
Bakery					X		X	X	X	
Other Food Processing						X	X			
Catering service					X		X	X		
Brewery Sales outlet									X	
Brewing and/or winemaking									X	
Film or Recording studio					X			X		X
Photographic establishment					X		X			
Veterinarian Establishment					X		X		X	X
Kennel							X			
Animal Shelter									X	X
Service shop, Merchandise /light machinery repair					X		X	X	X	X
Machinery Sales						X				
Industrial Equipment Sales and Rental								X		
Railway						X				
Commercial Garage						X	X			
Automotive and heavy truck repair facility			X	X			X			
Motor vehicle body shop/repair garage									X	X
Service Station							X			
Towing office and garage									X	X
Motor vehicle wash									X	X
Fuel yard							X			

	Kingston	Kingston	Kingston	Kingston	Kingston	Cornwall	Cornwall	Brockville	Napanee	Napanee
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Storage Garage							X			
Industrial and/or automotive supply								X		
Used car lot							X			
RV sales and servicing									X	X
Garden Centre						X	X		X	X
Retail Lumber yard							X			
Building supply outlet										X
Home Decorating Store								X		
Feed yard							X			
Supporting a Permitted Use										
Administrative, Professional, and technical services supporting a permitted use	X					X	X			
Office and business services such as printing and equipment repair intended to support a business park/industrial use.	X		X	X				X	X	X
Athletic Facility/Health Club									X	X
Restaurant	X		X	X	X		X	X	X	
Financial Institution	X		X	X	X		X		X	
Personal Services and convenience commercial	X		X	X					X	
Recreation parks	X		X	X						
Public/private recreation facility/Assembly hall					X		X		X	X

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	No. 76-26 (Kingston Township), BP-2	No. 76-26 (Kingston Township) M6-23	No. 76-26 (Kingston Township) M1-12	No. 76-26 (Kingston Township) M1-13	No. 32-74 (Township of Pittsburgh) BP-1	City of Cornwall Zoning By-Law No. 751, 1969, MFR 40	City of Cornwall Zoning By-Law No. 751, 1969, MFR 20	City of Brockville Zoning By-Law No. 050-2014	The Zoning By-Law (02-22) of the Town of Greater Napanee (BP)	The Zoning By-Law (02-22) of the Town of Greater Napanee (M1)
Bingo Hall									X	
Bowling Alley									X	
Parking lots/structures	X		X	X			X		X	X
Clinic					X					
Day Nursery					X			X		
Adult Day Care								X		
Hotel or Motor Hotel					X					

*** permitted but limited.

Appendix F – Zoning By-law Comparison Matrix

Appendix F: Zoning By-law Comparison Matrix

	Kingston	Kingston	Kingston	Kingston	Kingston	Napanee	Napanee	Brockville	Cornwall	Cornwall
	No. 76-26 (Kingston Township), BP-2	No. 76-26 (Kingston Township) M6-23	No. 76-26 (Kingston Township) M1-12	No. 76-26 (Kingston Township) M1-13	No. 32-74 (Township of Pittsburgh) BP- 1	By-Law 02-22 The Zoning By-Law of the Town of Greater Napanee	By-Law 02-22 The Zoning By-Law of the Town of Greater Napanee	City of Brockville Zoning By-Law No. 050-2014	City of Cornwall Zoning By-Law No. 751, 1969	City of Cornwall Zoning By-Law No. 751, 1969
Applicable Zoning Designation	BP-2 Business Park – 2	M6-23 Restricted General Industrial Zone - special	M1-12 General Industrial Zone - Special	M1-13 General Industrial Zone - special	BP-1, Business Park Zone (BP)	Business Park (BP)	Light Industrial (M1)	E1 – Business Park	MFR 40, Manufacturing 40	MFR 20, Manufacturing 20
Other Industrial Zoning Designations in the By-Law Area	Industrial Commercial (C7) General Industrial Zone (M1) Light Industrial Zone (M2) Service Industrial Zone (M3) Disposal Industrial Zone (M4) Extractive Industrial Zone (M5) Restricted General Industrial Zone (M6) Business Park (BP)	Same as BP-2	Same as BP-2	Same as BP-2	Restricted Industrial Zone (M1) General Industrial Zone (M2) Extractive Industrial Zone (MX) Disposal Industrial Zone (MD) Business Park Zone (BP)	Business Park (BP) Light Industrial (M1) General Industrial (M2) Rural Industrial (M3)	Business Park (BP) Light Industrial (M1) General Industrial (M2) Rural Industrial (M3)	General Employment – E2 Restricted Employment – E3	Manufacturing 10 – MFR 10 Manufacturing 20 – MFR 20 Manufacturing 30 – MFR 30 Manufacturing 40 - MFR Service Industrial – M.S.	Same as MFR 40
Locational Context	Cataraqui Estates Business Park (fully serviced)	Cataraqui Estates Business Park (fully serviced)	Cataraqui Estates Business Park, Gardiners Road at Fortune Crescent. (fully serviced)	Cataraqui Estates Business Park, Gardiners Road at Fortune Crescent. (fully serviced)	St. Lawrence Business Park, East End of Kingston, South of Highway 401, at Innovation Dr. and Highway 15 (fully serviced)	??Richmond Industrial Park, North of Highway 401, Highway 41 at Goodyear Road (fully serviced) and Dairy Road, south of Highway 401 in Napanee.	??Richmond Industrial Park, North of Highway 401, Highway 41 at Goodyear Road (fully serviced) and Dairy Road, south of Highway 401 in Napanee.	John G. Broome Industrial Park north of Highway 401 at North Augusta Rd. (fully serviced)	Cornwall Business Park (eastern part) South of Highway 401 at Boundary road and Tenth Street (fully serviced)	Cornwall Business Park mainly at Boundary road south of Tenth Street (fully serviced)
Zoning Provisions:										
Permitted Uses	(Section 30A(3)(b)) <ul style="list-style-type: none"> Corporate administrative office; Research and development facility carried out within enclosed buildings; Data processing and related 	(Section 28A(3)(w)) <ul style="list-style-type: none"> Contractors or tradesman’s shop or yard. (Section 28A(2)) <ul style="list-style-type: none"> A business or professional office, but shall not include a primary or accessory retail use; a dry-cleaning 	(Section 24(3)(10)(l)) <ul style="list-style-type: none"> Manufacturing, assembling, fabricating, and processing operations; Construction and transportation activities and facility; Storage, 	(Section 24(3)(m)) <ul style="list-style-type: none"> Manufacturing, assembling, fabricating, and processing operations; Construction and transportation activities and facility; Storage, warehousing 	(Section 21A) <ul style="list-style-type: none"> an assembly plant a bakery a bank or financial institution a business office a catering service a clinic 	(Section 5.26) <ul style="list-style-type: none"> Animal shelter; Assembly hall; Athletic, fitness or health club; Bakery; Bingo hall; Brewery sales outlet; Brewing 	(Section 5.27) <ul style="list-style-type: none"> Auction sales barn; Animal shelter; Arena; Assembly, manufacturing, fabrication or processing plant which is not obnoxious or a nuisance 	(Section 7.1) <ul style="list-style-type: none"> Adult Day Care Agricultural use (no structures or livestock) Artists workshop Bakery Business and Professional Office Business Incubator/Accelerator 	(MFR 40) Manufacturing and assembly of: <ul style="list-style-type: none"> Food and beverage , agricultural implements, hardware, cutlery, machinery, tools, dies, moulds, jigs, fixtures and 	(MFR 20) <ul style="list-style-type: none"> Machine shop Service station, commercial garage or storage garage. Dairy, bakery, frozen food lockers, cold storage plant, bottling plant, food warehouse and similar uses.

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	<p>services, including call centre;</p> <ul style="list-style-type: none"> Administrative, professional and technical services supporting a permitted use; and, Public use in accordance with Section 5(18) of By-Law No. 76-26. <p>Complementary Permitted uses:</p> <ul style="list-style-type: none"> Office and business services such as printing and equipment repair intended to serve the Business Park Industrial area; Restaurant; Financial institution; Personal services and convenience commercial; Public and private parks and recreation facilities; and, Parking lots and structure. 	<p>or laundry plant;</p> <ul style="list-style-type: none"> a fabricating plant; a manufacturing plant; a processing plant; a public use, in accordance with the provisions of Section 5(18) hereof; a warehouse. 	<p>warehousing and wholesale trade activities;</p> <ul style="list-style-type: none"> Communications and utilities facility; Institutional uses with General Industrial characteristics, such as a trade school; and, Public use in accordance with Section 5(18) of By-Law No. 76-26. <p>Complementary Permitted uses:</p> <ul style="list-style-type: none"> Office and business services such as printing and equipment repair intended to serve the General Industrial area; Restaurant; Financial institution; Personal services and convenience commercial; Automotive, heavy equipment or truck repair facility; Public and private parks and recreation facilities; and, Parking lots and 	<p>and wholesale trade activities;</p> <ul style="list-style-type: none"> Communications and utilities facility; Institutional uses with General Industrial characteristics, such as a trade school; Business and professional office provided that such use is located within 90 metres of the Resource Road frontage; and, Public use in accordance with Section 5(18) of By-Law No. 76-26. <p>Complementary Permitted uses:</p> <ul style="list-style-type: none"> Office and business services such as printing and equipment repair intended to serve the General Industrial area; Restaurant; Financial institution; Personal services and convenience commercial; Automotive, heavy equipment or 	<ul style="list-style-type: none"> a commercial school a data processing and related service a day nursery a dry cleaning and/or laundry service a film and/or recording studio a hotel or motor hotel a laboratory a manufacturing plant a photographic establishment a printing establishment a public recreation facility a public use a research and development facility a restaurant a service shop, merchandise a technical training facility a veterinary establishment a warehouse 	<p>and/or winemaking establishments;</p> <ul style="list-style-type: none"> Bowling alley; Business, professional or administrative office; Commercial school; Convenience store; Courier establishments; Data processing and related services; Eating establishments and drive through eating establishments; Financial office or institution; Fire hall, police station, ambulance depot; Garden nursery and supply; Laboratory and research facility; Licensed establishments; 	<p>by reason of emission of contaminants as defined in the Environmental Protection Act or the Health Protection and Promotion Act;</p> <ul style="list-style-type: none"> Athletic, fitness or health club; Business, professional or administrative office; Building supply outlet; Bus depot; Data processing and related service; Film and/or recording studios; Fire hall, police station, ambulance depot; Garden nursery or greenhouse; Laboratory and/or research and development facility; Mini storage warehouse; Motor vehicle 	<ul style="list-style-type: none"> Business Service Establishment Catering Service Commercial School Computer Design and Development Facility Computer Services Contractor's Establishment Custom Workshop Courier Service Day nursery Dry Cleaning Distribution Station Dry Cleaning Plant Film, Television and Recording Studio Home Decorating Store Industrial Equipment Sales Service and Rental Industrial and/or automotive supply Industrial mall Industrial Service Industrial Use – Light Machine and Welding shop Medical Laboratory Newspaper Plant Offices and yard of Construction 	<p>patterns, sheet and plate metal products, wire goods, plumbing fixtures, heating and cooling equipment; floor coverings, signs, small boats, trailers, mobile homes, transportation equipment; electrical appliances, apparatus and supplies; laboratory and testing equipment; house wares, cosmetics and pharmaceutical preparations.</p> <ul style="list-style-type: none"> Manufacturing from the following previously prepared materials; bone; leather and fur; tobacco; rubber; textiles; wood and paper; glass and other non- 	<ul style="list-style-type: none"> Building materials yard; Laundry, cleaning and dyeing works, carpet cleaning. Contractor's equipment storage yard or plant. Warehouse for storage or wholesale business; Retail lumber yard; Workshops for light machinery repair and similar uses; Feed or fuel yard. Motor transport terminal express or freight shed, transit vehicles storage or repair shop. Laboratories; experimental, photo, motion picture, film or testing. Municipal, public utility or government yard. Animal hospital and boarding kennels. Parking lot, private or public. Used car lot, private or public. Place of assembly or recreation restricted to

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			structure.	truck repair facility; <ul style="list-style-type: none"> Public and private parks and recreation facilities; and, Parking lots and parking structure. 		<ul style="list-style-type: none"> Mini storage warehouse; Motor vehicle repair garage; Motor vehicle dealership; Motor vehicle sales used; Motor vehicle wash; Municipal, county, provincial maintenance depot; Parking Lot; Printing establishment; Public use in accordance with the General Provisions of the By-law; Recreational vehicle sales and service; Research and development facility; Retail establishment not exceeding 500 square metres; Retail or wholesale outlet accessory to a permitted use; Service shop 	body shop; <ul style="list-style-type: none"> Motor vehicle repair garage; Motor vehicle sales (existing); Motor vehicle wash; Municipal, County, Provincial maintenance depot; Parking lot; Printing establishment ; Public use in accordance with the General Provisions of this By-law; Recreational vehicle sales and service; Retail and wholesale outlet accessory to a permitted use; Service shop merchandise; Towing office and garage; Truck or transport depot; Veterinary clinic; Warehouse or wholesale establishment ; Water 	company <ul style="list-style-type: none"> Outside Storage (as an accessory only) See additional provisions in general provisions) Research and Development Establishment Restaurant Restaurant – Take out Self-Service Storage Facility Semi-Permanent Covered Structure (as an accessory structure) Service and Repair Shop Service use Taxi Dispatch Office Testing and Research Laboratory Tree cutting service Transportation terminal Vocational Training Centre Warehouse Wholesale Establishment 	metallic minerals; metals; plastics. <ul style="list-style-type: none"> Printing and accessory trades, construction and service trades, freight terminal, warehouse, household mover, machinery sales, wholesale sales and storage, machine shop, dairy, bakery, candy kitchen, research and testing laboratories, operation of a railway. Trade and technical schools Commercial garages Call/help desk centre, minimum 2319m² Garden Centre/Nursery or Greenhouse 	athletic and health clubs and a workers or union hall. <ul style="list-style-type: none"> Taxi depot. a catering service. Business and professional offices restricted to radio or television broadcasting and receiving stations, office of an owner or agent of an industrial mall. Factory retail outlet for those products produced on the manufacturing establishment An accessory building including one residential apartment Research and development facility and Call/Help Desk Centre minimum 2319m² In industrial malls: <ul style="list-style-type: none"> Commercial and technical schools; Restaurant; Business and professional offices restricted to banks, trust companies, financial institution offices

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						<ul style="list-style-type: none"> personal; Service shop merchandise; Taxi establishment; Towing office and garage; Veterinary clinic; Warehouse. 	<ul style="list-style-type: none"> treatment plant; Workshop. 			<ul style="list-style-type: none"> support industrial and manufacturing, up to a maximum of 25% of the gross leasable floor area. Garden Centre/Nursery or Greenhouse.
Accessory Retail Use	Not permitted	(Section 28A(3)(w)) Permitted: up to 25% of total floor area.	(Section 24(3)(l)) Not Permitted	(Section 24(3)(m)) Permitted: up to 25% of total floor area.	(Section 21A) Permitted: Must be located within main building 30% or less of total floor area (including showroom area)	(Section 5.26) Not permitted.	(Section 5.27) Permitted.	(Section 3) Permitted, a minimum of 50m ² , maximum of 5% of the total 300m ²	Not permitted	(MFR 20) Permitted, up to 30% of G.F.A.
Accessory Dwelling Unit	(Section 30A(2)) Not permitted	(Section 28A(1)) Permitted (minimum size 39m ²)	(Section 24(3)(10)(l)) Not Permitted	(Section 24(3)(m)) Not Permitted	(Section 21A) Not permitted	(Section 5.26) Not permitted.	(Section 5.27) Not permitted.	(Section 7.1) Not permitted	(Section 01-2) Not permitted	(MFR 20) Permitted for an employee whose residence on the premises is essential, when the lot is a minimum of 464m ² and frontage 15m
Accessory Building	(Section 5) Permitted	(Section 28A(1)) Permitted except for a business or professional office	(Section 5) Permitted	(Section 5) Permitted	(Section 21A) Not permitted	(Section 5.26) Permitted (Section 4.1) Must comply with setback requirements and be 2m from main building. Up to 10% of lot area, maximum height same as for principle building.	(Section 5.27) Permitted (Section 4.1) Must comply with setback requirements and be 2m from main building. Up to 10% of lot area, maximum height same as for principle building.	(Section 3) Permitted	(MFR 40) Permitted	(MFR 20) Permitted, up to 10% of the lot maximum height 3m.
Minimum Lot Size	(Section 30A(2)) 550m ²	(Section 28A(3)(w)) 2000m ²	(Section 24(2)) None	(Section 24(2)) None	(Section 21A) None	(Section 5.26) 1000m ²	(Section 5.27) 2000m ²	(Section 7.2) 375m ²	(MFR 40) 8094m ² 2023m ²	(MFR 20) None
Minimum Lot Frontage	(Section 30A(2))	(Section 28A(3)(w))	(Section 24(2))	(Section 24(2))	(Section 21A)	(Section 5.26)	(Section 5.27)	(Section 7.2)	(MFR 40)	(MFR 20)

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	25m	30.48m	21m	21m	30m	30m	30m	15m	61m 30.5m in some places	None
Lot Coverage (maximum)	(Section 30A(3)(b)) 60%	(Section 28A) 60%	(Section 24(2)(e)) 70%	(Section 24(2)(e)) 70%	(Section 21A) 60%	(Section 5.26) 50%	(Section 5.27) 50%	N/A	N/A	N/A
Yard Requirements/Setbacks for lots abutting industrial zone (minimums)	(Section 30A(3)(b)) 10m front yard depth 10m exterior side yard width (Section 30A(1)) 7.5m interior side yard width 7.5m rear yard width	(Section 28A(2)) 15m front yard depth 15m exterior side yard width 3m interior side yard width 7.6m rear yard depth	(Section 24(3)(10)(l)) 10m front yard depth 10m exterior side yard width 3m interior side yard depth 7.6m rear yard depth	(Section 24(3)(m)) 10m front yard depth 10m exterior side yard width 3m interior side yard depth 7.6m rear yard depth	(Section 21A) 8m front yard depth 8m exterior side yard width 6m interior side yard width 8m rear yard depth	(Section 5.26) 6m front yard depth 6m exterior side yard width 3m interior side yard width 10m rear yard depth	(Section 5.27) 15m front yard depth 12m exterior side yard width 6m interior side yard width 15m rear yard depth	(Section 7.2) 9m front yard depth 6m exterior side yard width 6m interior side yard width 6m rear yard depth	(MFR 40) 15m front yard depth 6m side yard width 6m rear yard depth	(MFR 20) 15m front yard depth 15m side yard width 15m rear yard depth
Yard requirements for lots abutting or across the street from any other zone	(See landscaped open space)	N/A	N/A	N/A	(Section 21A (3)) 15m setback of any building	(Section 5.26) Where abutting a residential zone, the side/rear yard 20m	(Section 5.27) Where abutting a residential zone, the side/rear yard 20m			(MFR 20) When abuts a residential zone, 23m front, and 52.5m side and rear.
Construction Materials for Exterior Walls								(Section 7.2) Faces on any street or highway, or Residential Zone: brick, masonry, glass, precast concrete, anodized aluminum, steel, enamelled steel or aluminum or any combination thereof.	(MFR 40) Brick, stone, reinforced concrete, glass or steel, enameled or galvanized iron, aluminum, asbestos, or a combination of these materials.	
Height	(Section 30A(3)(b)) 20m	(Section 28A(2)) 18m	(Section 24(3)(10)(l)) 20m	(Section 24(3)(m)) 20m	Section 21A) 12m or 2 storeys (whichever is lesser) Hotels and Office Buildings: 25m or 6 storeys (whichever is lesser)	(Section 5.26) 12m, (Section 4.15) chimneys may be higher	(Section 5.27) 15m, (Section 4.15) chimneys may be higher	(Section 7.2) 30m except, 15m in an industrial mall and 60m for process towers/industrial structures	(MFR 40) 14.5m when within 20m of a residential area (Section 01-2) Otherwise, 27.5m, smokestacks and chimneys may be higher	(Section 01-2) 27.5m, smokestacks and chimneys may be higher
Parking										
Number of Spaces (spaces/amount of G.F.A., unless	(Section 5(10)) Industrial Establishment:	(Section 28A(2)) 1 space/per 97m ²	(Section 5(10)) Industrial Establishment:	(Section 24(3)(m)) Manufacturing or Warehouse use:	(Section 21A (3)) Bank or Financial Institution:	(Section 4.27) Assembly Hall, Auditorium,	(Section 4.27) Business and/or Professional	(Section 3.33) Offices: • 3.5	(Section 01-3) Warehouse; Wholesale	(Section 01-3) Warehouse; Wholesale

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otherwise noted)	<p>Manufacturing:</p> <ul style="list-style-type: none"> • 2.69 spaces/100m² <p>Warehousing and storage:</p> <ul style="list-style-type: none"> • 1.66 spaces/100m² <p>Office or Public Building:</p> <ul style="list-style-type: none"> • 3.57 spaces/100m² • 3.2 spaces/100m² with transit. <p>Restaurant:</p> <ul style="list-style-type: none"> • 10.0 spaces/100m² with a minimum of 20 spaces for a drive-in restaurant. <p>Retail:</p> <ul style="list-style-type: none"> • 5.25 parking spaces/100m² <p>Other non-residential uses not specified in Section 5(16):</p> <ul style="list-style-type: none"> • 2.5 spaces/100m² 		<p>Manufacturing:</p> <ul style="list-style-type: none"> • 2.69 spaces/100m² <p>Warehousing and storage:</p> <ul style="list-style-type: none"> • 1.66 spaces/100m² <p>Office or Public Building:</p> <ul style="list-style-type: none"> • 3.57 spaces/100m² • 3.2 spaces/100m² with transit. <p>Restaurant:</p> <ul style="list-style-type: none"> • 10.0 spaces/100m² with a minimum of 20 spaces for a drive-in restaurant. <p>Retail:</p> <ul style="list-style-type: none"> • 5.25 parking spaces/100m² <p>Other non-residential uses not specified in Section 5(16):</p> <ul style="list-style-type: none"> • 2.5 spaces/100m² <p>Self-Storage Facility:</p> <ul style="list-style-type: none"> • 1 space/300 storage units, plus 1 space for employees and 1 parking space. • A minimum of 5 spaces. 	<ul style="list-style-type: none"> • 1 space per 100m² <p>Section 5(10)) Office or Public Building:</p> <ul style="list-style-type: none"> • 3.57 spaces/100m² • 3.2 spaces/100m² with transit. <p>Restaurant:</p> <ul style="list-style-type: none"> • 10.0 spaces/100m² with a minimum of 20 spaces for a drive-in restaurant. <p>Retail:</p> <ul style="list-style-type: none"> • 5.25 parking spaces/100m² <p>Self-Storage Facility:</p> <ul style="list-style-type: none"> • 1 space/300 storage units, plus 1 space for employees and 1 parking space. • A minimum of 5 spaces. 	<ul style="list-style-type: none"> • 5.8 spaces/100m² <p>Business Office:</p> <ul style="list-style-type: none"> • 3.5 spaces/100m² <p>Data Processing:</p> <ul style="list-style-type: none"> • 2.5 spaces/100m² <p>Laboratory, Research and Development:</p> <ul style="list-style-type: none"> • 2.2 spaces/100m² <p>Warehouse:</p> <ul style="list-style-type: none"> • 1.5 spaces/100m² <p>Clinic:</p> <ul style="list-style-type: none"> • 5 spaces/100m² <p>Recreational Establishment:</p> <ul style="list-style-type: none"> • 5 spaces/100m², or • 1 space/7 seats (whichever is greater) 	<p>Arena, community Centre, Place of Worship, Private club or other similar places of assembly not otherwise specified herein:</p> <ul style="list-style-type: none"> • 1 space/5 seats, 9m², or 4 persons that may be legally accommodated. <p>Bowling Lane:</p> <ul style="list-style-type: none"> • 1 space/bowling lane, plus parking as required for restaurant <p>Business and/or Professional Office including Home Occupations:</p> <ul style="list-style-type: none"> • 1 space/28m² <p>Eating Establishment, exclusive of a take-out eating establishment:</p> <ul style="list-style-type: none"> • 1 space/9m² <p>Eating Establishment - Take Out:</p> <ul style="list-style-type: none"> • 6 spaces/100m² <p>Manufacturing, Processing, Assembly, Fabricating Plant, Wholesale</p>	<p>Office including Home Occupations:</p> <ul style="list-style-type: none"> • 1 space/28m² G.F.A. <p>Manufacturing, Processing, Assembly, Fabricating Plant, Wholesale Establishment or Warehouse</p> <ul style="list-style-type: none"> • 1 space/38m² <p>Personal Service Shop or Merchandise Shop</p> <ul style="list-style-type: none"> • 1 space/18.5m² <p>Workshop:</p> <ul style="list-style-type: none"> • 1 space/50m² <p>Non-residential uses permitted in this By-law other than those listed in Section 4.27:</p> <ul style="list-style-type: none"> • 1 space/38m² 	<p>spaces/100m² leasable area on first storey, and</p> <ul style="list-style-type: none"> • 2 spaces/100m² leasable area on other storeys <p>Commercial School:</p> <ul style="list-style-type: none"> • 4 spaces/classroom <p>Day nursery:</p> <ul style="list-style-type: none"> • 2 spaces/20m² leasable area <p>Home Decorating Store:</p> <ul style="list-style-type: none"> • 2 spaces/100m² leasable area <p>Industrial Equipment Sales Service and Rental:</p> <ul style="list-style-type: none"> • 5 spaces/100m² leasable area <p>Industrial mall:</p> <ul style="list-style-type: none"> • 1 space / 80m² leasable area <p>Industrial Use – Light:</p> <ul style="list-style-type: none"> • 1 space/100m² leasable area up to 900m², • then 1 space/185m² <p>Restaurant:</p> <ul style="list-style-type: none"> • 1 spaces/15m² leasable area (min 5) <p>Restaurant – Take out:</p> <ul style="list-style-type: none"> • 1 spaces/8m² leasable area (min 5) <p>Transportation terminal:</p> <ul style="list-style-type: none"> • 1 spaces/185m² leasable area <p>Warehouse:</p>	<p>Establishment; Commercial Storage; Garage; Commercial Storage Facility; Trucking Terminal; and including accessory office Space:</p> <ul style="list-style-type: none"> • 1 space/100m² up to 2800m², then 1 space/300m² <p>Call Centre:</p> <ul style="list-style-type: none"> • 1 space/20m² <p>All other industrial uses not defined in this section, such as: Industrial Mall; Cleaning or Laundry Plant; Custom Workshop; Photographic Establishment; Food or Service Industry; Light Industrial other than Warehousing:</p> <ul style="list-style-type: none"> • 1 space/50m² <p>Builder's Retail Yard; Scrap Yard; Vehicle Sales; Mobile Home Sales; and Trailer Sales.</p> <ul style="list-style-type: none"> • 5 spaces, plus 1 space/50m² <p>Personal Service Shops; Video Stores; Dry Cleaning and Laundry Depot; Business and Professional Offices; Government and Public Offices; Medical Clinic and Offices; Printing Newspaper</p>	<p>Establishment; Commercial Storage; Garage; Commercial Storage Facility; Trucking Terminal; and including accessory office Space:</p> <ul style="list-style-type: none"> • 1 space/100m² to 2800m², then 1 space/300m² <p>Call Centre:</p> <ul style="list-style-type: none"> • 1 space/20m² <p>All other industrial uses not defined in this section, such as: Industrial Mall; Cleaning or Laundry Plant; Custom Workshop; Photographic Establishment; Food or Service Industry; Light Industrial other than Warehousing:</p> <ul style="list-style-type: none"> • 1 space/50m² <p>Builder's Retail Yard; Scrap Yard; Vehicle Sales; Mobile Home Sales; and Trailer Sales.</p> <ul style="list-style-type: none"> • 5 spaces, plus 1 space/50m² <p>Personal Service Shops; Video Stores; Dry Cleaning and Laundry Depot; Business and Professional Offices; Government and Public Offices; Medical Clinic and Offices; Printing Newspaper</p>

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						Establishment or Warehouse: <ul style="list-style-type: none"> 1 space/38m² Personal Service Shop or Merchandise Shop: <ul style="list-style-type: none"> 1 space/18.5m² Non-residential uses permitted in this By-law other than those listed in Section 4.27: <ul style="list-style-type: none"> 1 space/38m² 		<ul style="list-style-type: none"> 1 space/90m² leasable area Wholesale Establishment: <ul style="list-style-type: none"> 1 space/100m² leasable area Retail uses: <ul style="list-style-type: none"> 5 spaces/100m² leasable area All other employment uses: <ul style="list-style-type: none"> 1 space/90m² leasable area (Section 3.9) Bicycle Parking: Between 1 space per 250m ² and 1 space per 1000m ²		Establishments; Animal Hospital, Clinic or Veterinary establishment; and Contractors establishment: <ul style="list-style-type: none"> 1 space/28m² Places of Assembly such as: Churches, Church Halls; Meeting and Dance Halls, Arenas, Banquet or Convention Rooms, Auditorium, Cinemas, Theatres, Bus Terminal, Restaurants, Bars and Taverns: <ul style="list-style-type: none"> 1 space/6 seats or 5.5m² of assembly space High School, Colleges, Trade School, Commercial School: <ul style="list-style-type: none"> 5 spaces/classroom, plus for assembly space as required (MFR 20) Accessory Retail: <ul style="list-style-type: none"> 1 space/28m²
Number of Barrier Free Spaces	(Section 5(11)) 5 - 19 (1 barrier free) 20 - 100 (2 barrier free) 101 - 200 (4 barrier free) 201 - 300 (6 barrier free) 301 - 400 (8 barrier free)	(Section 5(11)) 5 - 19 (1 barrier free) 20 - 100 (2 barrier free) 101 - 200 (4 barrier free) 201 - 300 (6 barrier free) 301 - 400 (8 barrier free)	(Section 5(11)) 5 - 19 (1 barrier free) 20 - 100 (2 barrier free) 101 - 200 (4 barrier free) 201 - 300 (6 barrier free) 301 - 400 (8 barrier free)	(Section 5(11)) 5 - 19 (1 barrier free) 20 - 100 (2 barrier free) 101 - 200 (4 barrier free) 201 - 300 (6 barrier free) 301 - 400 (8 barrier free)	(Section 5(14)) 5 - 19 (1 barrier free) 20 - 100 (2 barrier free) 101 - 200 (4 barrier free) 201 - 300 (6 barrier free) 301 - 400 (8 barrier free)	(Section 4.27) 1-100 (2 barrier free) 101-200 (3 barrier free) 201-300 (4 barrier free) 301-400 (5 barrier free) 401-500 (6 barrier free)	(Section 4.27) 1-100 (2 barrier free) 101-200 (3 barrier free) 201-300 (4 barrier free) 301-400 (5 barrier free) 401-500 (6 barrier free)	(Section 3.33) 1 space/50 required spaces, minimum of 1.	(Section 01-3) 1 space/50 required spaces	(Section 01-3) 1 space/50 required spaces

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	401 - 500 (10 barrier free) more than 500 (12 barrier free)	401 - 500 (10 barrier free) more than 500 (12 barrier free)	401 - 500 (10 barrier free) more than 500 (12 barrier free)	401 - 500 (10 barrier free) more than 500 (12 barrier free)	401 - 500 (10 barrier free) more than 500 (12 barrier free)	>500 (6 barrier free, plus 1 additional /100 required)	>500 (6 barrier free, plus 1 additional /100 required)			
Location of parking Spaces	(Section 30A(2)) Parking is prohibited within 10m of any street line, and any parking located between a building and a street line shall be screened from view by landscaping including any necessary berms required to screen any parking area.	(Section 28A(2)) Visitor parking permitted in front yard.	N/A	(Section 24(3)(m)) Parking area may be permitted in the front yard, exterior side yard and rear yard provided that no part of any parking area, other than a driveway, is located closer than 7.6 metres to any street line	(Section 21A(3)) Shall be landscaped so as to block their view from abutting streets.	(Section 4.27) Located in an interior side or rear yard, except for visitor parking areas which may be located within a front or exterior side yard, but not closer than 3m to any streetline or lot line abutting lots in a residential or community facility zone.	(Section 4.27) Located in an interior side or rear yard, except for visitor parking areas which may be located within a front or exterior side yard, but not closer than 3m to any streetline or lot line abutting lots in a residential or community facility zone.	(Section 3.33) Permitted in interior side and rear yards only.	(Section 01-3) May be located in the yards if a 3m landscaping strip is maintained along street line or 1m along other property lines. Must not exceed 40% of front yard. May be located off-site within 150m.	(Section 01-3) May be located in the yards if a 3m landscaping strip is maintained along street line or 1m along other property lines. Must not exceed 40% of front yard. May be located off-site within 150m.
Access to parking spaces	(Section 5(11)) One way: 3-9m Two-way: 6-13.5m	(Section 5(11)) One way: 3-9m Two-way: 6-13.5m	(Section 5(11)) One way: 3-9m Two-way: 6-13.5m	(Section 5(11)) One way: 3-9m Two-way: 6-13.5m	(Section 5(14)) Access via an unobstructed driveway between 3.5-9m in width.	(Section 4.27) 3-9m	(Section 4.27) 3-9m	(Section 3.33) One way: 3m Two way: 6-9m	(Section 01-3) One way: 3.7m Two way: 6m	(Section 01-3) One way: 3.7m Two way: 6m
Surface treatment requirements	(Section 30A(2)) Surfaced in asphalt or concrete.	(Section 28A(2)) Surfaced with asphalt or concrete.	(Section 5(11)) A stable surface which is treated so as to prevent the raising of dust or loose particles.	(Section 5(11)) A stable surface which is treated so as to prevent the raising of dust or loose particles.	(Section 5(14)) Paved with an asphaltic, lockstone or concrete surface.	(Section 4.27) A stable surface which is treated so as to prevent the raising of dust.	(Section 4.27) A stable surface which is treated so as to prevent the raising of dust.	(Section 3.33) Paved in asphaltic, brick or concrete surface	(Section 01-3) Paved with a hard surface material	(Section 01-3) Paved with a hard surface material
Loading										
Dimensions of loading spaces	(Section 5(6)) 9mX3.5m, 4m clearance	(Section 5(6)) 9mX3.5m, 4m clearance	(Section 5(6)) 9mX3.5m, 4m clearance	(Section 5(6)) 9mX3.5m, 4m clearance	(Section 5(10)) 9m X 3.5m, 4m clearance	(Section 4.21) 9mX3.5m, 4m clearance	(Section 4.21) 9mX3.5m, 4m clearance	(Section 3.24) 9mX3m, 4.5m clearance	(Section 01-3) 10.7mX3.7m, 4.3m clearance	(Section 01-3) 10.7mX3.7m, 4.3m clearance
Number of Loading Spaces	(Section 5(6)) G.F.A. < 280m ² 1 280 – 2300m ² 2 2300 – 7400m ² 3 >7400m ² 3, plus 1 per each	(Section 5(6)) G.F.A. < 280m ² 1 280 – 2300m ² 2 2300 – 7400m ² 3 >7400m ² 3, plus 1 per each	(Section 5(6)) G.F.A. < 280m ² 1 280 – 2300m ² 2 2300 – 7400m ² 3 >7400m ² 3, plus 1 per each	(Section 5(6)) G.F.A. < 280m ² 1 280 – 2300m ² 2 2300 – 7400m ² 3 >7400m ² 3, plus 1 per each	(Section 5(10)) G.F.A. < 280m ² 1 280 – 2300m ² 2 2300 – 7400m ² 3 >7400m ² 3, plus 1 per each	(Section 4.21) <1000m ² 1 1000-4000m ² 2 4000-8000m ² 3 >8000m ² 3 plus 1 space/each	(Section 4.21) <1000m ² 1 1000-4000m ² 2 4000-8000m ² 3 >8000m ² 3 plus 1 space/each	(Section 3.24) <420m ² 0 420-2300m ² 1 >2300m ² 2	(Section 01-3) <200m ² 0 loading/unloading occurs 1 space/2800m ² up to 6 spaces.	(Section 01-3) <200m ² 0 loading/unloading occurs 1 space/2800m ² up to 6 spaces.

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	additional 9300m ²	additional 9300m ²	additional 9300m ²	additional 9300m ²	additional 9300m ²	additional 10,000m ²	additional 10,000m ²			
Location of Loading Spaces	(Section 5(6)) On the same lot. May be located in an interior side yard or rear yard if not closer than 18.3m from a street line.	(Section 5(6)) On the same lot. May be located in an interior side yard or rear yard if not closer than 18.3m from a street line.	(Section 5(6)) On the same lot. May be located in an interior side yard or rear yard if not closer than 18.3m from a street line.	(Section 24(3)(m)) Loading spaces shall be located in the exterior side yard or rear yard only provided that such loading space is located no closer than 18.3 metres to any street line.	(Section 5(10)) Shall be located on the same lot.	(Section 4.21) In an interior side yard or rear yard only unless a 15m away from the street lines.	(Section 4.21) In an interior side yard or rear yard only unless a 15m away from the street lines.	(Section 3.24) In an interior side yard or rear yard only.	(Section 01-3) Not in a front yard, or yard adjoining a street. Screened from adjacent lots.	(Section 01-3) Not in a front yard, or yard adjoining a street. Screened from adjacent lots.
Access to loading spaces (minimum, or range)	(Section 5(6)) One way: 3.5m Two way: 6m	(Section 5(6)) One way: 3.5m Two way: 6m	(Section 5(6)) One way: 3.5m Two way: 6m	(Section 5(6)) One way: 3.5m Two way: 6m	(Section 5(10)) Driveway at least 3.5m wide	(Section 4.21) 6m minimum	(Section 4.21) 6m minimum	(Section 3.24) 6m minimum	(Section 01-3) One way: 3.7m Two way: 6m	(Section 01-3) One way: 3.7m Two way: 6m
Surface treatment requirements	(Section 30A(2)) Surfaced in asphalt or concrete.	(Section 5(6)) A stable surface which is treated so as to prevent the raising of dust or loose particles.	(Section 5(6)) A stable surface which is treated so as to prevent the raising of dust or loose particles.	(Section 5(6)) A stable surface which is treated so as to prevent the raising of dust or loose particles.	(Section 21A) All parking and loading spaces and aisles shall be paved with an asphaltic, lockstone or concrete surface.	(Section 4.21) A stable surface which is treated so as to prevent the raising of dust.	(Section 4.21) A stable surface which is treated so as to prevent the raising of dust.	(Section 3.24) paved with an asphaltic or concrete surface and be so constructed to prevent drainage onto the travelled portion of any street or adjacent lands.	(Section 01-3) A stable surface treated so as to prevent the raising of dust or loose particles.	(Section 01-3) A stable surface treated so as to prevent the raising of dust or loose particles.
Outdoor storage	(Section 30A(2)) Prohibited	(Section 28A(2)) Permitted. Must be: <ul style="list-style-type: none"> An accessory to the use of the main building In compliance with setback requirements Not located in a front or exterior side yard. Enclosed by at least a six-foot high fence or wall in good condition. Buffered when visible from a public street. 	(Section 24(2)(i)) Permitted. Must be: <ul style="list-style-type: none"> An accessory to the use of the main building In compliance with setback requirements Not located in a front or exterior side yard. Maximum of 35% of the lot. Enclosed by at least an eight-wire farm fence in good condition. 	(Section 24(2)(i)) Permitted. Must be: <ul style="list-style-type: none"> An accessory to the use of the main building In compliance with setback requirements Not located in a front or exterior side yard. Maximum of 35% of the lot. Enclosed by at least an eight-wire farm fence in good condition. 	(Section 21A (3)) Only permitted in certain areas of the business park. Must be: <ul style="list-style-type: none"> An accessory to the use of the main building In compliance with setback requirements Not located in a yard, landscaped area, or within required setback. Maximum of 15% of the lot. Enclosed by a fence at least 	(Section 5.26) Permitted. Must: <ul style="list-style-type: none"> Comply with setbacks Must be at least 6m from a lot line where abuts residential Maximum of 15% of area Screened with a planting strip or fence minimum of 1.8m 	(Section 5.27) Permitted. Must: <ul style="list-style-type: none"> Comply with setbacks Must be at least 6m from a lot line where abuts residential Maximum of 20% of area Screened with a planting strip or fence minimum of 1.8m 	(Section 3.32) Permitted. Must be: <ul style="list-style-type: none"> In the rear or interior side yards Comply with yard requirements where abutting a non-employment zone Maximum of 35% of the lot area and not more than twice as high as the ground floor of the main building Concealed from view by a planting, fence or wall (minimum 	(MFR 40) Permitted in side or rear yard. Must be: <ul style="list-style-type: none"> stored in an orderly fashion screened by a suitable barrier, fence or hedge as defined in the City of Cornwall Fence By-law 	Not permitted

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					1.8m high in good condition and landscaping materials.			height of 1.8m)		
Landscaped Open Space										
Minimum Landscaped Open Space	(Section 30A(2)) 20%	(Section 28A(2)) 10%	(Section 24(2)) 10%	(Section 24(2)) 10%	(Section 21A) 10%	(Section 5.26) 10%	(Section 5.27) 10%	(Section 7.2) 15%	(MFR 40) Front and side yards shall be landscaped except for areas that are for parking	None
Special requirements	(Section 30A(2)) 10m wide landscaping strip where adjacent to an existing or proposed street. 2m wide landscaping strip where adjacent to each side or rear lot line, not less than 2m of landscaped planting strip, except for a lot abutting an arterial street where there shall be not less than 10m of landscaped planting strip;	N/A	N/A	N/A	(Section 21A (3)) 8m deep landscaped open space where adjacent to other use/road. (Section 21A (3)) A 15 metre landscaped open space area shall be established along the northerly boundary of the BP-1 Zone.	(Section 4.20) any portion of front and exterior side yard that is not used for any other permitted purpose shall be landscaped.	(Section 4.20) any portion of front and exterior side yard that is not used for any other permitted purpose shall be landscaped.	(Section 3.34) Minimum 3m wide planting Strip required when abutting a Residential zone	None	(Section 01-03) 3m landscape strip along any street line and 1m along any other property line.

*** Where measurements were defined in feet, squared feet, or acres, they have been converted to meters and square meters at the following rate: **1m=3.28f**, and, **1m²=10.78f²**, **1acre=4046.86m²**, rounded.