

# ANALYSIS OF LAND USE DEMANDS AND IMPLICATIONS FOR THE ALBION FLATS

DISTRICT OF MAPLE RIDGE

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## EXECUTIVE SUMMARY

G.P. Rollo & Associates Ltd. (GPRA) has been engaged by the District of Maple Ridge to conduct an analysis of land use demands and opportunities for the Albion Flats. Specifically, GPRA has examined the potential for industrial/business park, agricultural, commercial, recreational and residential uses to be incorporated into a future vision for the Albion Flats. The intent of this study is to provide key background information for subsequent visioning and planning exercises to be undertaken by the District in conjunction with all stakeholders.

This analysis has found significant merits for a range of land uses to be included at the Albion Flats. It presents overviews of the market potential for each land uses, and provides indications of the relative strengths and weaknesses of each in the context of a series of criteria.

The relative potential, and key strengths and weaknesses of each use, are presented below.

### **Commercial:**

#### *Demand (Scenarios):*

- If a proposed 300,000+ square foot shopping centre is developed at the Kwantlen lands along the Lougheed Highway by 2012, it is projected that demand would allow for construction of between 140,000 and 190,000 square feet of retail space could be constructed at the Albion Flats by 2015, and between 300,000 and 425,000 square feet could be constructed by 2025.
- If the Kwantlen project proceeds in 2012 and an additional 400,000 square feet are constructed in Pitt Meadows east of Harris Road along Lougheed Highway prior to Albion Flats coming to market, it is expected that demand would allow for construction of between 85,000 and 112,000 square feet by 2015 and between 171,000 and 240,000 by 2025.
- If neither the Kwantlen or Pitt Meadows projects proceed there would be demand for a shopping centre with between 259,000 and 303,000 square feet by 2017, and between 444,000 and 524,000 square feet by 2025.
  - If a new shopping centre on Albion Flats is assumed to capture 5% of sales from existing retail in Maple Ridge, a shopping centre with between 378,000 to 422,000 square feet by 2017 and 586,000 to 667,000 square feet by 2025 would be warranted.

#### *Strengths:*

- Major retailers look for highway locations due to visibility and ease of access and egress. The Albion Flats provide both. Also, Albion Flats is 10-20 minutes by car from major population concentrations such as Mission and Langley, and less than 10 minutes from downtown Maple Ridge.
- For medium and large format retail uses and associated ancillary businesses, the Albion Flats provides a large land base which would allow for strategic grouping, something which may not be possible at other locations.
- Commercial at the Flats would provide service sector employment opportunities.

- Retail uses at the Albion Flats could have competitive implications for Haney Place Mall in the Town Centre. This may force a repositioning of the centre, which would be a boon for town centre revitalization prospects.
- New retail offerings in the District would provide additional tax revenue, and would reduce the need for residents to seek shopping opportunities at Pitt Meadows, Langley and elsewhere.

*Weaknesses:*

- If retail development at the Albion Flats were to offer a pedestrian-oriented shopping experience in the form of an ‘idealized’ downtown high-street, this could have competitive implications for the Town Centre.
- The placement of retail tenants at the Albion Flats would pre-empt them from possibly locating in the Town Centre.
- Retail development at the Albion Flats is inconsistent with current District and Metro Vancouver planning policies, and would require the lands to be excluded from the ALR.
- Retail development could lead to removal of relatively high quality agricultural lands north of 105<sup>th</sup> Avenue from the region’s agricultural land base.
- Commercial development could increase competition for some retail categories in the Maple Ridge Town Centre.
- Commercial uses would require an amendment to the Draft R.G.S. to be developed on the Albion Flats.

**Industrial:**

*Demand:*

- Based on forecasted employment growth as well as historical development trends, Maple Ridge is expected to require an additional 150 – 250 acres of industrial land by 2041.
- If the Pelton Lands are excluded from the ALR and developed as an industrial park, this will reduce short-and medium term pressure for designation of additional industrial lands in the District.

*Strengths:*

- Under the Draft Metro Vancouver Regional Growth Strategy (2010), re-designation of agricultural lands to industrial at the Albion Flats would require a 50% + 1 vote from the Metro Vancouver Board.
- Maple Ridge is looking to increase employment opportunities to reduce the number of residents that commute elsewhere in the Region for work. Additional well-located and fully-serviced industrial areas would help to meet this goal.
- Albion Flats is located more strategically than the majority of Maple Ridge’s remaining vacant and under-utilized industrial lands.

*Weaknesses:*

- Distance from Golden Ears or Pitt River Bridge suggests that industrial lands in the south Harris Road area of Pitt Meadows, along Lougheed in Pitt Meadows, and the few remaining acres in western Maple Ridge would likely be absorbed before the Albion Flats.
- If the Pelton Lands are removed from the ALR, industrial absorption at the Albion Flats would likely be delayed as the Pelton Lands are better located relative to transportation corridors.
- Industrial lands would not provide as much tax revenue as residential or commercial uses.
- Could lead to removal of significant potentially productive farmland from the agricultural land base.
- Additional high quality light industrial/business park space may draw office tenants from the Town Centre and elsewhere, and/or preclude future office space from locating in the Town Centre.
- Industrial uses would require an amendment to the Draft R.G.S. to be developed on the Albion Flats.

**Agricultural:**

*Demand:*

- It is difficult to quantify demand for agricultural land, but regional goals require protecting the agricultural sector and productive agricultural lands.

*Strengths:*

- The Agricultural Land Commission suggests that the Albion Flats has good soils for agricultural uses, particularly north of 105<sup>th</sup> Avenue.
- Agriculture is the designated use for the Albion Flats by both the Maple Ridge OCP and the Metro Vancouver Regional Growth Strategy (current and Draft)
- Retaining agriculturally productive land is a key aspect of maintaining a sustainable region.
- Agricultural use is well suited to lands situated within the Fraser River floodplain.
- Environmental sensitivities. While agriculture can be an intensive land use, it can still be suitable next to environmentally sensitive areas.

*Weaknesses:*

- Nearby development, including residential units to the north and Planet Ice arena has reportedly caused flooding issues on the agricultural lands north of 105<sup>th</sup> Avenue. Bringing those lands to their full productivity potential will require hydrological upgrades.
- Smaller lots and fragmented ownership make efficient agricultural use of the land difficult. Consolidation of land would make the Albion Flats more productive for agricultural purposes.
- Real estate speculation makes acquiring land for agriculture difficult.
- Urban encroachment increases complaints about agricultural use.
- Economic spinoffs from agriculture are hard to quantify.

## **Recreational:**

### *Demand:*

- The District's Parks, Recreation and Culture Master Plan (2010) calls for the addition of approximately 40 acres of new recreational facilities on the Albion Flats.
- Population growth, combined with the fact that existing recreational facilities are at capacity, indicates need for significant new outdoor and indoor recreation facilities in the District in coming years.

### *Strengths:*

- Building upon existing facilities. Albion Flats already have a strong cluster of recreational and cultural facilities; additional amenities would build a strong regional cluster capable of hosting larger events.
- Low density recreational facilities are a suitable use for lands in a floodplain.
- Environmental sensitivities. Recreational and cultural uses of the Albion Flats are less invasive than other uses, and would be suitable next to lands where there are environmentally sensitive areas.

### *Weaknesses:*

- More dense residential development nearby would assure more consistent use of the multi-purpose indoor facility.
- Recreational facilities and public amenities make excellent anchors in town centres. Additional investment in recreational facilities on Albion Flats could be made in the Town Centre and would have a significant positive impact on the downtown area.
- Recreational uses would require permission for non-farm use from the ALC.

## **Residential:**

### *Demand:*

- If Albion Flats were developed with primarily residential uses the site could accommodate between 1,500 & 2,500 units (based on density) and require between 8 and 24 years to absorb (assuming a market share of 15% to 25%).

### *Strengths:*

- Strong Location. The Albion Flats are a short, typically traffic free, drive to the Town Centre. The site also has easy access to Lougheed Highway, 240th Street.
- Combination within a mixed-use project. If commercial uses are being considered for the site, residential uses would also be appropriate. Residential uses would also work well with the recreational facilities planned for the Albion Flats.
- Green space. A residential project on the Albion Flats would benefit from all the green space and parks located on the site.

*Weaknesses:*

- The Albion Flats are not designated for residential use, and re-designation would run counter to planning policies at the District and Metro Vancouver levels.
- The Albion Flats are located within the Fraser River floodplain. Residential development in a floodplain raises potentially serious issues.
- Locating residential units near agricultural uses has been problematic in the past. The Maple Ridge Agricultural Plan cites stress in the agricultural / residential interface as a key issue facing the agricultural sector. Educating nearby residents about the agricultural sector was recommended.
- Residential density at the Albion Flats would likely delay both the possibility of increasing residential density in the Town Centre and growth in identified expansion areas.
- Residential uses would require an amendment to the Draft R.G.S. to be developed on the Albion Flats.

## Contents

EXECUTIVE SUMMARY.....	i
1.0 INTRODUCTION.....	1
2.0 ASSUMPTIONS AND LIMITING CONDITIONS .....	2
3.0 INTRODUCTION TO THE ALBION FLATS .....	3
3.1 Overview of Albion Flats .....	3
3.2 Albion Flats and the Maple Ridge Official Community Plan .....	3
3.3 Future of Albion Flats: Competing Interests.....	4
3.4 Development Constraints at the Albion Flats.....	4
3.5 Issues of Interest to Maple Ridge .....	5
4.0 INDUSTRIAL DEMAND ANALYSIS & IMPLICATIONS FOR THE ALBION FLATS .....	6
4.1 Industrial Overview.....	6
4.2 Industrial Land Demand.....	9
4.3 Complementary Land Uses .....	11
4.4 Locating Industrial at the Albion Flats: Strengths and Weaknesses .....	12
5.0 COMMERCIAL DEMAND ANALYSIS & IMPLICATIONS FOR ALBION FLATS.....	13
5.1 Background .....	13
5.2 Maple Ridge Retail Market: Questions and Method .....	14
5.3 Maple Ridge Retail Supply .....	16
5.4 Maple Ridge Retail Demand .....	19
5.5 Retail Potential at Albion Flats.....	21
5.6 Albion Flats & the Town Centre: Challenges and Opportunities .....	24
5.7 Complementary Land Uses .....	28
5.8 Locating Retail at the Albion Flats: Strengths and Weaknesses .....	30
6.0 AGRICULTURAL LAND USES AT THE ALBION FLATS .....	31
6.1 Agricultural Review .....	31
6.2 Opportunity for Agricultural Uses on Albion Flats.....	33
6.3 Complementary Land Uses .....	34
6.4 Strengths & Weaknesses of Agricultural Uses at Albion Flats .....	35
7.0 RECREATIONAL AND COMMUNITY LAND USES AT THE ALBION FLATS.....	36
7.1 Recreational & Community Land Overview.....	36
7.2 Future for Recreational & Community Uses on Albion Flats .....	37

7.3 Complementary Land Uses .....	37
7.3 Strengths & Weaknesses of Recreational Uses at Albion Flats .....	38
8.0 RESIDENTIAL DEMAND ANALYSIS & IMPLICATIONS FOR THE ALBION FLATS .....	39
8.1 Residential Overview .....	39
8.2 Maple Ridge Growth Strategy.....	42
8.3 Residential Potential at the Albion Flats.....	42
8.4 Policy and Market Considerations .....	43
8.5 Complementary Land Uses .....	44
8.6 Strengths and Weaknesses of Residential Uses at Albion Flats.....	45
9.0 SUMMARY OF LAND USE STRENGTHS & WEAKNESSES.....	46
9.1 Concluding Land Use Remarks.....	46
9.2 Land Use Strengths and Weaknesses Summary Tables.....	48



## List of Figures

FIGURE 1:	ALBION FLATS AND SURROUNDING AREAS .....	3
FIGURE 2:	MAPLE RIDGE INDUSTRIAL ZONES .....	6
FIGURE 3:	MAPLE RIDGE ZONED INDUSTRIAL AREA BY DESIGNATION AND REGION, 2010 ..	7
FIGURE 4:	MAPLE RIDGE INDUSTRIAL LAND UTILIZATION BY REGION, 2010.....	7
FIGURE 5:	MAJOR NATIONAL RETAILERS ALONG LOUGHEED CORRIDOR .....	17
FIGURE 6:	MAJOR NATIONAL RETAILERS IN AND AROUND TOWN CENTRE .....	18
FIGURE 7:	ALBION FLATS AGRICULTURAL LANDS .....	31
FIGURE 9:	HISTORICAL HOUSING VALUES IN MAPLE RIDGE .....	39
FIGURE 10:	MAPLE RIDGE SUB-REGIONS.....	40
FIGURE 11:	DWELLING STRUCTURE TYPES BY SUB-REGION .....	41

## List of Tables

TABLE 1:	INDUSTRIAL ACRES REQUIRED, 2015 TO 2040.....	10
TABLE 2:	INDUSTRIAL / BUSINESS PARK STRENGTHS AND WEAKNESSES @ ALBION FLATS ....	12
TABLE 3:	RETAIL PROJECTS IN PLANNING PIPELINE WITH POTENTIAL COMPETITIVE IMPLICATIONS FOR ALBION FLATS RETAIL.....	14
TABLE 4:	RETAIL INVENTORY AND SPACE SUPPORTABLE, 2010 .....	16
TABLE 5:	MAPLE RIDGE TOTAL RETAIL EXPENDITURES, 2010 TO 2035.....	19
TABLE 6:	MAPLE RIDGE GROSS RETAIL FLOOR AREA SUPPORTED, 2010 TO 2035 .....	20
TABLE 7:	RETAIL \$ INFLOW/OUTFLOW BY CATEGORY, 2010.....	21
TABLE 8:	RETAIL SPACE SUPPORTABLE AT ALBION FLATS, SCENARIO 1 .....	22
TABLE 9:	RETAIL SPACE SUPPORTABLE AT ALBION FLATS, SCENARIO 2 .....	23
TABLE 10:	RETAIL SPACE SUPPORTABLE AT ALBION FLATS, SCENARIO 3A.....	23
TABLE 11:	RETAIL SPACE SUPPORTABLE AT ALBION FLATS, SCENARIO 3B.....	24
TABLE 12:	RETAIL STRENGTHS & WEAKNESSES AT THE ALBION FLATS .....	30
TABLE 13:	STRENGTHS & WEAKNESSES OF AGRICULTURAL USES AT ALBION FLATS.....	35
TABLE 14:	STRENGTHS AND WEAKNESSES OF RECREATIONAL USES AT ALBION FLATS.....	38
TABLE 15:	HOUSEHOLD SIZE AND DWELLING UNIT FORECAST .....	41
TABLE 16:	RESIDENTIAL UNIT MIX AT ALBION FLATS .....	43
TABLE 17:	STRENGTHS & WEAKNESSES OF RESIDENTIAL AT ALBION FLATS.....	45

## 1.0 INTRODUCTION

G.P. Rollo & Associates Ltd. (GPRA) has been retained by the District of Maple Ridge to conduct an analysis of land use demand and opportunities for the Albion Flats. Specifically, GPRA has examined the potential for a series of land uses to be located on-site, including:

- industrial/business park
- agricultural
- commercial
- recreational
- residential

The intent of this study is to provide background information for subsequent Albion Flats visioning and planning exercises to be undertaken by the District in conjunction with key stakeholders.

This analysis draws heavily on data and analysis from a previous GPRA study for the District entitled *Maple Ridge Socio-Economic Trends and Implications for the Future of the Albion Flats* (August 2010).

This study is not intended to be prescriptive, but rather to provide key information to ‘feed’ into public planning processes.

## 2.0 ASSUMPTIONS AND LIMITING CONDITIONS

This Analysis of land use demands and implications for the Albion Flats in Maple Ridge is governed by the following assumptions and limiting conditions:

- 1) The Study is intended to provide background information for a charette process for the Albion Flats. It is intended to inform the District, facilitating consultants, and the public at large.
- 2) The methodologies and assumptions behind the forecasts for land uses (residential, industrial, commercial etc.) have, in some cases, not been presented in full detail. This is by design and intended so the key messages rather than the methodologies come to the fore.
- 3) The commercial section is not an impact study, and is only intended to provide background information for the retail market in Maple Ridge.
- 4) GPRA has refrained from presenting personal opinion or bias towards the ultimate land use or mix of uses chosen for the Albion Flats. This report is intended to provide background information to allow for principled decisions around vision, objectives and policies to emerge through the charette process. However, statements contained within this study which do involve matters of professional opinion, whether or not identified as such, are intended as opinion only and not as representations of fact.
- 5) Some comments from stakeholders have been referred to in the report. These comments should be considered as opinion and not as fact.
- 6) All statistical information provided in this study has been drawn from sources deemed to be reliable, for which we assume no responsibility, but which we believe to be correct.
- 7) This report is intended to be read in its entirety; individual sections should not be extracted or reproduced or in any way utilized independently of the complete report.

This study is qualified in its entirety by, and should be considered in light of these limitations, conditions and considerations. If, for any reason, major changes should occur which influence the basic assumptions stated previously, the findings and recommendations contained in these analyses should be reviewed with such conditions in mind and revised if necessary.

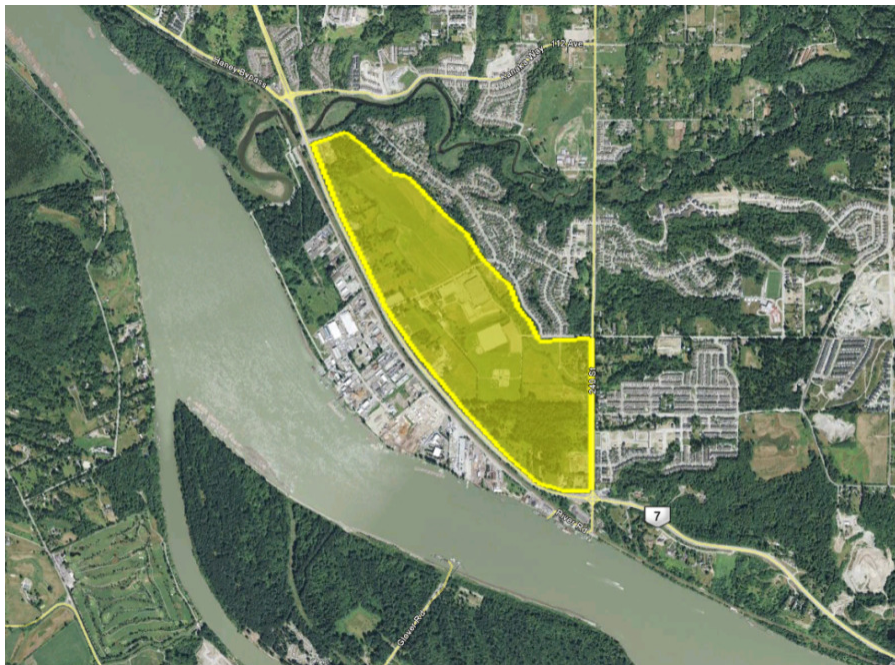
### 3.0 INTRODUCTION TO THE ALBION FLATS

#### 3.1 OVERVIEW OF ALBION FLATS

The Albion Flats are located within the District of Maple Ridge, south east of the Town Centre along the Lougheed Highway near the Fraser River. The Albion Flats are bounded to the west and southwest by Lougheed Highway, to the north and northwest by Tamarack Lane and 105th Avenue, and to the east by 240th Street.

The Albion Flats are comprised of 125.8 hectares (310.9 acres), of which 89% or 275.8 acres reside in the Agricultural Land Reserve (ALR).

**Figure 1: Albion Flats and Surrounding Areas**



Immediate land use adjacencies include industrial lands across Highway #7 (Lougheed Highway) to the west and southwest, Park, green space and single family residential to the north, and residential to the east.

#### 3.2 ALBION FLATS AND THE MAPLE RIDGE OFFICIAL COMMUNITY PLAN

The Maple Ridge Official Community Plan (OCP) designates a range of land uses at the Albion Flats. Uses include commercial, institutional, agricultural, residential, park/green space and public use.

Agricultural land uses are designated for nearly 89 hectares, or 71% of total land area. Parks and green spaces are designated for 33 hectares, or 26% of the site. Institutional uses make up an additional 2% (2.5 hectares), and the combination of residential and commercial uses account for 1% (1.4 ha).

Actual active land uses at Albion do not necessarily reflect OCP land use designations. For instance, while 71% of the site is agriculturally designated, only 23% of the site is considered as actively agricultural. Additionally, while only 26%

of the site is delineated as 'park within the ALR' in the OCP, 87% of the site is vegetated.

The Albion Flats has been designated Agricultural in the Draft Metro Vancouver Regional Growth Strategy (RGS) and is contiguous with the Urban Containment Boundary. The Albion Flats has also been identified as a "Special Study Area" in the draft RGS which has the following implications:

- 'Special Study Area' implies that re-designating agricultural lands only requires 50% +1 vote from the Metro Vancouver Board.
- If land designated for agricultural use was not a 'Special Study Area' any re-designation would require the following steps:
  - An approving vote of 2/3rds from the Metro Vancouver Board.
  - Public Hearing

It should be recognized that the RGS has not yet been approved. Before the RGS is adopted, from the Metro Vancouver perspective the Albion Flats are governed by the Livable Region Strategic Plan (LRSP) which designates the Albion Flats as "Agricultural Lands in the Green Zone." No re-designation of the Albion Flats to any other use, including industrial, would be possible without an LRSP amendment. Such an amendment would be counter to one of the four main strategies of the LRSP "Protect the Green Zone."

### 3.3 FUTURE OF ALBION FLATS: COMPETING INTERESTS

As a large, mostly undeveloped site (save for recreation uses) with excellent access and visibility, multiple stakeholders, including development interests, have competing visions for the future of the site.

Stakeholders include the 38 landowners at the site (including the District of Maple Ridge), the Agricultural Land Commission (ALC), the Metro Region, businesses across the region and all citizens of the District.

This report is intended to provide input into the Albion Flats visioning charrette process, facilitated by the District and consultants, from which a unified vision and strategy for the Albion Flats will emerge.

### 3.4 DEVELOPMENT CONSTRAINTS AT THE ALBION FLATS

The Environmental Baseline Study for the Albion Flats identified a series of environmental constraints to future development. These include:

- The presence of multiple streams; stream setbacks alone account for approximately 121 acres, or 39% of total site area;
- Seasonal flooding susceptibility;
- Potentially sensitive environmental areas and habitats;
- Geotechnical issues, including susceptibility to liquefaction in the event of an earthquake.

Other constraints include: location within the floodplain of the Fraser River; high cost of site preparation (including fill); and hydrological concerns.

### 3.5 ISSUES OF INTEREST TO MAPLE RIDGE

There are a number of key District areas of interest that must be considered in light of land use decisions at the Albion Flats. Interests include:

- Promoting health and vitality of the Town Centre, including residential, commercial and institutional growth;
- Increasing employment opportunities in the District, enhancing the ability to live close to work;
- Protecting fertile agricultural lands;
- Providing recreational opportunities for a growing population;
- Providing affordable housing for a growing and aging population.

## 4.0 INDUSTRIAL DEMAND ANALYSIS & IMPLICATIONS FOR THE ALBION FLATS

This industrial analysis has two purposes. The first is to identify the overall requirements for new industrial lands in Maple Ridge in the coming decades. Industrial land area projections are based on both employment forecasts and Maple Ridge's projected share of Metro Vancouver's industrial land base. The second is to assess the appropriateness of industrial land uses at the Albion Flats.

### 4.1 INDUSTRIAL OVERVIEW

#### 4.1.1 Designated and Zoned Industrial Lands

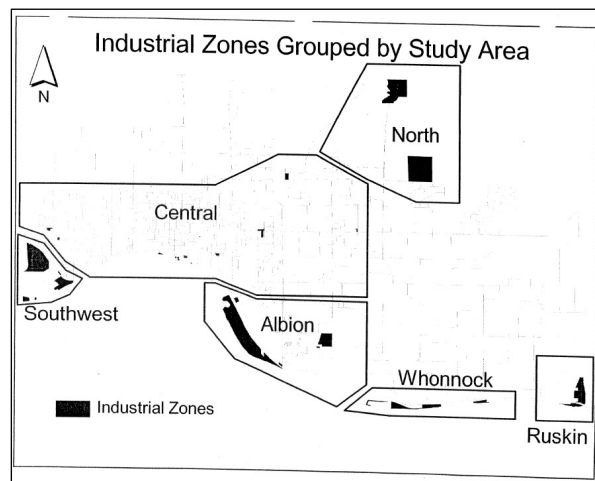
A comprehensive overview of designated and zoned industrial areas was provided by GPRA in the August 2010 report entitled *Maple Ridge Socio-Economic Trends and Implications for the Future of Albion Flats*. This section provides a summary of those findings.

The District of Maple Ridge's OCP designates a total of 1,481 acres of land for industrial uses. The total industrial land area is further separated into the following categories:

- Business Park: 29% or 432 acres
- General Industrial: 22% or 330 acres
- Rural Resource: 49% or 718 acres

The designated industrial areas in Maple Ridge are located as follows:

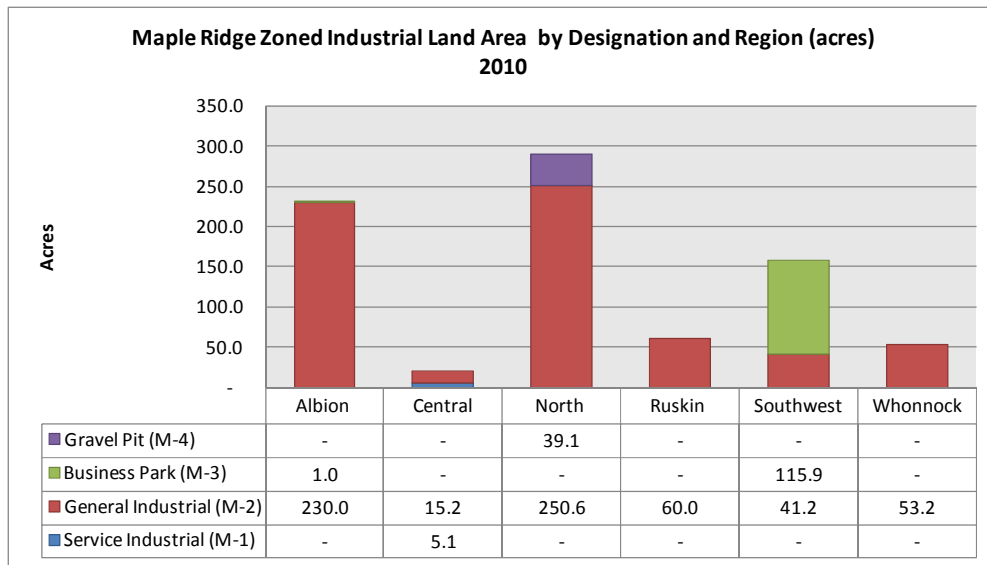
**Figure 2: Maple Ridge Industrial Zones**



All of the District's 'Rural Resource' lands (formerly the Industrial Reserve) are located in the North. General industrial space is distributed primarily between Whonnock (42%) and the North (30%); Ruskin and the Southwest account for an additional 19% and 9% respectively. Business parks are located in two areas: Albion and the

Southwest. The former contains 47% of designated area, with the latter accounting for 53%. There is considerably less land zoned for industrial uses than there is designated in the OCP. The total area of zoned industrial land, by region, is divided as following:

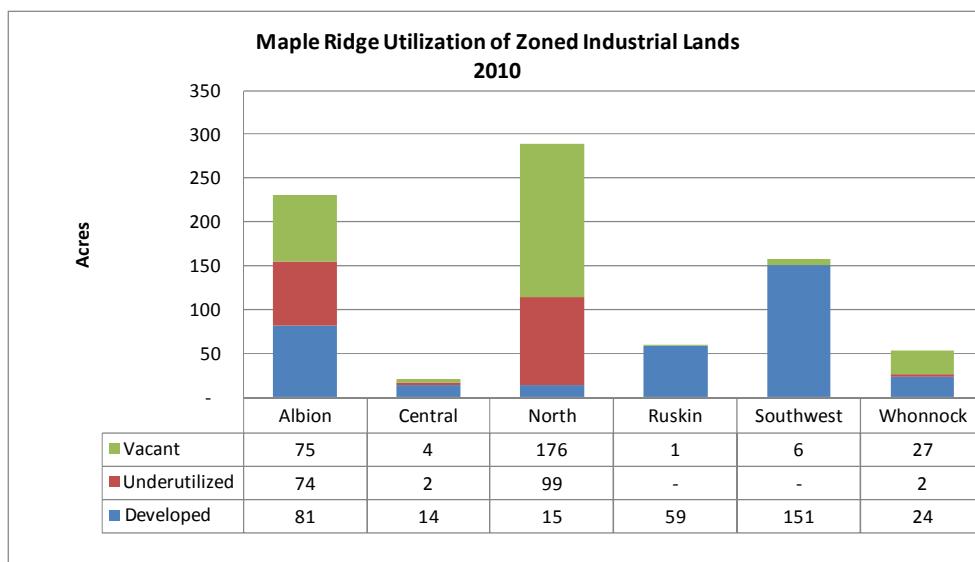


**Figure 3: Maple Ridge Zoned Industrial Area by Designation and Region, 2010**

There are approximately 811 acres of zoned industrial land in Maple Ridge, distributed by zoning designation as follows:

- Service Industrial (M-1): 5.1 acres (0.6%)
- General Industrial (M-2): 650.3 acres (80.2%)
- Business Park (M-3): 116.9 acres (14.4%)
- Extraction Industrial (M-4): 39.1 acres (4.8%)

Of the total zoned industrial lands in Maple Ridge, approximately 36% are vacant, and 22% are underutilized. According to District data, 42% of industrially zoned lands are developed. The following table displays developed, vacant, and underutilized lands by industrial sub-area.

**Figure 4: Maple Ridge Industrial Land Utilization by Region, 2010**

While at first blush it appears that Maple Ridge has a significant base of vacant (289 acres) and underutilized (178 acres) industrial lands, positioning it well for future growth without new industrial land allocations, further analysis reveals that little of the available industrial land base is well-located or serviced for the key growth sectors of light industrial and business park users.

- Only 3% of vacant zoned land is serviced, while the balance is either partially serviced (29%) or non-serviced (68%).<sup>1</sup>
- Furthermore, 0% of underutilized zoned land is serviced; 18% is partially serviced and 82% is non-serviced.
- Amongst vacant and underutilized zoned industrial land with at least partial servicing, there are less than 5 acres located within a 10 minute drive of the Golden Ears or Pitt River Bridges.
- There are less than 100 acres of yet-to-be zoned OCP-designated industrial lands within a 10-minute drive of the two bridges.
- With the market demanding light industrial and business park space, key siting requirements will be proximity to transportation infrastructure, site servicing and overall site design and quality.

All of these indicators point to a need for newly designated industrial areas.

#### 4.1.2 Industrial Employment

One of the areas of focus at the District is to increase the employment opportunities in Maple Ridge, reducing the need for residents to commute to other areas of the Metro Region for work. Increasing the area of developed employment lands is therefore vital.

In mid-2010 there were 3,103 employees working on industrially zoned lands in Maple Ridge. This represented approximately 12% of the total District employment base.

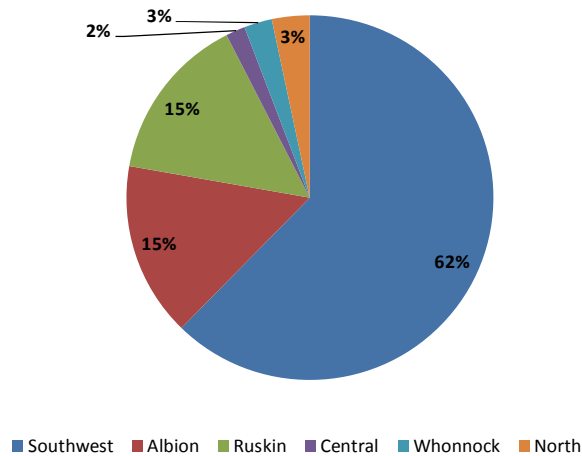
The primary employment sectors on Maple Ridge industrial lands are:

• Storage & Warehousing:	40%	1,025 employees
• Sawmill Facilities:	17.4%	445 employees
• Businesses at Commercial Strata Lots:	19%	492 employees
• Shingle Mills:	5%	128 employees
• Forestry:	4.8%	122 employees
• Lumber Remanufacturing:	4.5%	115 employees
• Automobile Dealerships:	1.3%	32 employees

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<sup>1</sup> Full service = water, sanitary and storm connections; Partial Service – water or sanitary or storm or combination of any 2 connections.

**Distribution of Employees by Zoned Industrial Area  
2010**



The above table displays that over 75% of employees on industrial lands are found within either the Southwest or Albion Industrial sub-areas.

#### 4.2 INDUSTRIAL LAND DEMAND

All indicators point towards a lack of contiguous, well-located industrial land in Maple Ridge. The question is, how much new land is required and when?

Demand projections for industrial space were undertaken in two ways: First, ratios of industrial employees to total employees for Maple Ridge were used and converted to warranted square feet based on industrial space per employee metrics. The ratio was incrementally increased over time based on our understanding of the District's intent to increase its industrial employment base in the coming years. In 2010, employees at industrial areas accounted for 12% of the District's employment base. It is expected that this will increase to 15% by 2020, 19% by 2030 and 22% by 2040.

The second method is based on historical rates of growth for both Metro Vancouver and Maple Ridge industrial land areas, and the latter's land base as a portion of the former, projected forward. Over the last 15 years, Maple Ridge's share of Metro Vancouver's industrial land has increased incrementally. We project that this will continue in the coming decades due to Maple Ridge's favourable position with regards to accessibility offered by recent transportation infrastructure upgrades.

Since 1996 the amount of developed area on industrial lands in Maple Ridge has increased on average 4.4% annually. This includes extended periods of zero new development between 2001 and 2003 as well as from 2008 until mid-2010. Our projection indicates an average annual growth rate of 4.5% between 2010 and 2040.

Assuming that Maple Ridge today has less than 10 acres of ‘first class’ contiguous industrial land available, defined as land with appropriate servicing, site contiguity and location near key transportation corridors, projections indicate that the District will require between **196 and 307 acres of new industrial land over the next 30 years**. See Table 1 below.

**Table 1: Industrial Acres Required, 2015 to 2040**

<b>Industrial Acres Required, Maple Ridge (Cumulative) 2015-2040</b>		
	<b>Low</b>	<b>High</b>
2015	22	33
2020	52	71
2025	86	115
2030	123	168
2035	167	232
2040	196	307
Source: Colliers International; District of Maple Ridge G.P. Rollo & Associates Ltd.		

The Albion flats offers approximately 180 acres of potentially developable area for industrial users with relative proximity to existing industrial zones, transportation infrastructure and possible servicing extensions. Available site contiguity at the Albion Flats is better than other industrial areas with similar accessibility profiles.

However, if the application to the ALC for exclusion of the Pelton Lands from the ALR is successful (lands bounded by 203<sup>rd</sup> Street and 132<sup>nd</sup> Avenue), absorption of industrial lands on Albion Flats would be delayed. Pelton Lands have better access to Metro Vancouver than Albion Flats, with its proximity to the Golden Ears Bridge, an important factor for industrial developers.

Potential demand for industrial lands on the Albion Flats will depend on whether the Pelton Lands are removed from the ALR. Either way the industrial lands in Pitt Meadows will likely be the first industrial lands absorbed in the area. After Pitt Meadows is built out, developers will turn their attention to either Pelton Lands or Albion Flats, in that order of preference, for industrial development.

#### 4.3 INDUSTRIAL COMPLEMENTARY LAND USES

- Agricultural:** Agricultural and industrial uses can work well together. The Maple Ridge Agricultural Plan suggests that there are insufficient industrial facilities in Maple Ridge to support the agricultural sector. There is a potential opportunity for the two uses to coexist and co-mingle at the Albion Flats.
- Recreational:** Light industrial and business park tenants and recreational facilities (both indoor and outdoor) are compatible neighbours.
- Residential:** In the case of heavy industrial uses, there is typically a buffer area between separating these tenants from residential areas. However, there are examples of light industrial or business park uses being mixed with residential, an example being the Dockside Green development near downtown Victoria.
- Commercial:** There are many examples of successful commercial projects located next to industrial projects. Typically commercial uses next to industrial lands are highway-oriented large and medium format retail projects.

#### 4.4 LOCATING INDUSTRIAL AT THE ALBION FLATS: STRENGTHS AND WEAKNESSES

There are a variety of strengths and weaknesses with regards to locating industrial users at the Albion Flats. These are outlined in the following table.

**Table 2: Industrial / Business Park Strengths and Weaknesses @ Albion Flats**

<b>Industrial / Business Park</b>			
<b>Criteria</b>	<b>Strengths</b>	<b>Weaknesses</b>	<b>Placement</b>
<b>OCP, Neighbourhood Plans</b>	Nothing Significant	Inconsistent with the current OCP policies	Agricultural land north of 105th are reportedly of higher quality.
<b>Metro Vancouver: LRSP and Draft RGS</b>	Designated as a 'Special Study Area' by the Draft RGS, which allows for re-designation with only a 50% + 1 vote from the Metro Vancouver Board.	Industrial would require an amendment to the existing Metro Vancouver LRSP as it is inconsistent with the designation of 'Green Zone'.	
<b>ALR</b>	Nothing Significant	Not an approved use of ALR lands. Would require removal of lands from the ALR.	
<b>Tax Implications</b>	Provides good tax revenue, and diversifies the District's tax base.	Nothing Significant	
<b>Strategic Considerations</b>	<p>Agricultural sector in Maple Ridge needs more agri-industrial space. Potential for agricultural / industrial mixed use.</p> <p>Proximity to existing Albion Industrial Area</p> <p>Promotes and enhances MR industrial sectors. Offers significant contiguous industrial land base within close proximity to Golden Ears Bridge.</p>	Industrial lands closer to Golden Ears and Pitt River Bridges (e.g. Pitt Meadows south Harris Road area, Lougheed Highway, potentially Pelton Lands in Maple Ridge) will likely be preferred by potential users.	Requirements for stream setbacks might make the south of the site a better location for industrial development.
<b>Employment</b>	Will provide the highest number of jobs of all land uses.	Nothing Significant	Best location for industrial development will depend on location of environmental constraints.
<b>Environmental Protection</b>	Could allow for retention of some agriculturally or environmentally significant lands. Could provide a base for agri-industrial uses.	Could lead to removal of significant productive farmland from the agricultural land base.	
<b>Town Centre Implications</b>	More employment in Maple Ridge would increase the need for services, most of which are located in the Town Centre.	An Industrial / Business Park might draw office tenants from Town Centre, or preclude future office space from locating in the Town Centre.	

## 5.0 COMMERCIAL DEMAND ANALYSIS & IMPLICATIONS FOR ALBION FLATS

The commercial analysis as it pertains to the Albion Flats has two purposes. The first is to provide an indication of the extent to which there is 'room' in the Maple Ridge retail market for new retail development at the Albion Flats. This part of the analysis does not give consideration to questions of built form, mixes of land uses, or site placement; rather the purpose is to point to the extent of retail potential across a variety of retail categories.

With an understanding of the size of the market and thus the amount and type of space that could be brought on stream, the second part of the analysis discusses the relative merits of locating retail uses at the Albion Flats. This section includes a discussion of the competitive implications that retail at Albion (and elsewhere) could have on the Town Centre.

### 5.1 BACKGROUND

The debate over retail development at the Albion Flats, of whatever form, size and intensity, must be examined within the context not only of retail offerings currently existing in the market (discussed in section 5.3 below), but also in relation to *new* developments that are in the planning pipeline. New retail developments in and around Maple Ridge have the ability to reshape retail spending patterns, absorb a finite amount of retail dollars, and thus affect the potential size, mix and timing of retail at the Albion Flats.

At the time of writing, there are two large potential retail projects on the horizon that may have implications for the Albion Flats: Kwantlen Shopping Centre and Pitt Meadows Shopping Centre (see Table 3 below for details).

Of these two projects, the first (Kwantlen) is most likely to proceed within the next year to two years, and therefore most likely to reach the market before any retail development at Albion Flats could proceed. The project in Pitt Meadows may be impacted by a recent ALR decision.

However, as neither project has yet broken ground, and the status of necessary approvals, financing and partnerships are unknown, there are no certainties around if or when either or both of these projects will be developed and leased. It is therefore an unknown whether a retail project at the Albion Flats would come on stream before, during or after either the Kwantlen or Pitt Meadows projects.

That said, information obtained by GPRA indicates that the Kwantlen shopping centre project is likely to proceed in 2011, with leasing occurring in 2012. GPRA also believes there is a high likelihood that the Pitt Meadows project will be constructed and brought on stream around 2015 or 2016. It is therefore assumed that Kwantlen will proceed prior to anything occurring at the Albion Flats.

**Table 3: Retail Projects in Planning Pipeline with Potential Competitive Implications for Albion Flats Retail**

Retail Projects in Planning Pipeline with Potential Competitive Implications for Albion Flats						
Project	Location	Size	Tenant Mix	Built Form	Completion Date	Notes
Kwantlen First Nation Retail Project	Lougheed Highway, 4 kilometres east of Albion Flats	2 sites: shopping centre commercial @ 300,000 sq.ft.; highway commercial @ 50,000 sq.ft. <b>TOTAL: 350,000 sq.ft.</b>	(1) <b>Shopping Centre Site</b> (south of Lougheed, east end of site): <b>300,000 sq. ft.</b> commercial south of the Lougheed (east end of site) with 2 destination large format anchors in 100,000 sq. ft. range, supported by 3-4 medium format stores and 6-8 smaller retail units and restaurants. (2) <b>Highway Commercial</b> (north & south of Lougheed, west end of site): <b>50,000 sq.ft.</b> of convenience stores, service station and neighbourhood business services.	The anticipated built form of the Shopping Centre would be an unenclosed centre with small pedestrian-oriented 'high street' type environment. The highway commercial is anticipated to be a strip centre emphasizing visibility and easy access/egress from the highway.	Construction of the Shopping Centre anticipated to begin in 2011, with completion in 2012. Highway commercial may come on stream in 2013	Part of a comprehensive land use plan which includes up to 450 residential units, cultural/archeological areas, walkign trails, creek and forest preservation areas, neighbourhood park and a playing field.
Pitt Meadows Shopping Centre	Lougheed Highway, 10 kilometres west of Albion Flats	shopping centre commercial @ <b>300,000 to 400,000 sq.ft.</b>	Unknown. The project would emphasize destination large and medium format stores with ancillary commercial and restaurant uses.	Assumption that this will be an unenclosed shopping centre, which may include a lifestyle village/'high-street' type environment, similar to that seen at the Grandview Corners Lifestyle Village in Surrey.	Likely between 2015 and 2020.	Could pre-empt new tenants to the market from locating elsewhere. Timing will be key.

## 5.2 MAPLE RIDGE RETAIL MARKET: QUESTIONS AND METHOD

The main thrust of the commercial section of this report is to answer the question: **“how many square feet of retail space could be constructed at the Albion Flats, of what type, and when?”** To answer this question, GPRA has undertaken a commercial demand analysis which takes into consideration a number of factors:

- Population forecasts for Maple Ridge
- Retail expenditures for Maple Ridge, by retail category<sup>2</sup>, based on 2008 Canada Expenditure Potential (CanEx) data for the District.
- Sales performance (\$/sq.ft.) by retail category.
- Trends in growth of retail expenditures by category.
- Trends in sales performance by category.
- Maple Ridge retail business inventory by category, 2010 (from District of Maple Ridge and GPRA inventory).
- Likely addition of new projects to the Maple Ridge and surrounding retail landscape (as discussed in section 5.1 above).

With regards to the final bullet point above, GPRA has proceeded with this analysis based on three broad scenarios:

1. Kwantlen shopping centre project coming on stream in 2012, with Albion Flats following it to market before any other major entries.

<sup>2</sup> Retail categories have been determined by GPRA and CanEx spending data has been grouped into these categories (at right).



2. Kwantlen shopping center project coming on stream in 2012, followed by Pitt Meadows shopping centre, with Albion Flats coming third to market after 2017.
3. Albion Flats retail proceeding without any significant new entrants to the market.

Each scenario has implications for Albion Flats retail in terms of potential size and tenant mix.

With the above scenarios in mind, our analysis takes the following steps:

- Analyse existing retail floor area in Maple Ridge by retail category (see table at right), determining the 'retail spending equivalent' that each category's floor area represents;
- Compare supportable floor area data to retail spending potential in each retail category. This comparison allows us to identify the approximate amount of retail spending that is 'leaking out' of the community to Pitt Meadows, Langley, Coquitlam and beyond;
- Apply realistic spending outflow recapture rates and market share allocations to each retail category (based on scenarios above) to determine how much new space could be constructed at the Albion Flats.

The extent to which a spending outflow recapture rate is 'realistic' will depend on the scenario being analysed. For instance, if Pitt Meadows shopping centre proceeds first (before Kwantlen or Albion Flats), its location within proximate driving distance to the majority of Maple Ridge residents will make it much less likely that a high percentage of spending in some categories (e.g. electronics) could subsequently be 'recaptured' and allocated to a new centre at the Albion Flats.

However, if a shopping center were opened at Kwantlen Lands in 2012, and this centre led to the recapture of some retail spending to Maple Ridge (increasing total retail dollars available in the Maple Ridge market), then a subsequent shopping centre at the Albion Flats would be able to take advantage of altered shopping patterns and repatriated retail dollars (Maple Ridge dollars flowing east along the Lougheed to Kwantlen rather than west to Pitt Meadows or south to Langley). By positioning itself between the major population areas to the west and Kwantlen's centre to the east, it would be able to intercept some of that spending.

Overall, retail capture rates are based on our understanding of the retail market and our experience in analysing retail market dynamics.

<b>Retail Categories</b>
<b>Convenience Goods &amp; Services</b>
Grocery & Specialty Food
Pharmacy
Alcohol & Tobacco
Services
<b>Comparison Goods</b>
Apparel
Footwear & Fashion Accessories
Cosmetics, Health, Bath & Beauty
Jewellery & Accessories
Home/Portable Electronics & Appliances
Multimedia, Books & Music
Home Furnishings & Accessories
Home Improvement
Toys / Hobbies / Pets
Sporting & Recreational Goods
<b>Food &amp; Beverage</b>
Restaurants
Alcohol Sales - Pubs / Lounges / Restaurants
<b>Entertainment &amp; Leisure</b>
Movies / Events (Non-Sport)
Leisure & Recreation

### 5.3 MAPLE RIDGE RETAIL SUPPLY

In mid-year 2010, the District of Maple Ridge has a retail inventory consisting of approximately 2.25 million square feet across all categories. This compares with spending potential capable of supporting nearly 2.65 million square feet. In other words, there is a net outflow of retail dollars from Maple Ridge to other communities. This point is addressed in subsequent sections below.

**Table 4: Retail Inventory and Space Supportable, 2010**

<b>Maple Ridge Retail inventory &amp; Gross Space Supportable, 2010</b>		
	<b>Inventory (sq.ft.)</b>	<b>Sq. Ft. Supportable</b>
<b>Retail Categories</b>		
<b>Convenience Goods &amp; Services</b>		
Grocery & Specialty Food	288,000	392,000
Pharmacy	40,000	34,000
Alcohol & Tobacco	37,000	70,000
Services	530,000	431,000
<b>Comparison Goods</b>		
Apparel	149,000	251,000
Footwear & Fashion Accessories	23,000	64,000
Cosmetics, Health, Bath & Beauty	21,000	77,000
Jewellery & Accessories	22,000	30,000
Home/Portable Electronics & Appliances	52,000	244,000
Multimedia, Books & Music	62,000	73,000
Home Furnishings & Accessories	139,000	140,000
Home Improvement	330,000	307,000
Toys / Hobbies / Pets	68,000	81,000
Sporting & Recreational Goods	24,000	45,000
<b>Food &amp; Beverage</b>		
Restaurants	266,000	237,000
Alcohol Sales - Pubs / Lounges / Restaurants	57,000	30,000
<b>Entertainment &amp; Leisure</b>		
Movies / Events (Non-Sport)	0	40,000
Leisure & Recreation	146,000	101,000
<b>Total</b>	<b>2,254,000</b>	<b>2,647,000</b>

Source: District of Maple Ridge; G.P. Rollo & Associates Ltd.

The existing retail inventory divided by category is shown in the above table. The most prominent category in Maple Ridge is Personal Services, accounting for approximately 24% of retail space. Other important categories include Home Improvement, Grocery & Specialty Food, and Restaurants with 13%, 12%, and 11% of total retail space respectively.

From a retail standpoint, while the District of Maple Ridge (including the Town Centre) has a significant inventory of retail areas and tenants, there are a number of modern retailers missing from the market. Therefore, any comment about a shortage of retail supply likely refers to missing anchors and a lack of modern retail space, versus a lack of overall supply.

The Town Centre of Maple Ridge includes significant retail supply that is not currently being optimized.

As referenced in the August 2010 *Socio-Economic Trends & Implications Report* produced by GPRA, 95% of Maple Ridge's retail inventory is located along the Lougheed Dewdney Corridor and the Town Centre.

As a visual reference, the image below displays the major national retailers located along the Lougheed Corridor.

**Figure 5: Major National Retailers along Lougheed Corridor**



The majority of these retailers are actually located in the Pitt Meadows project called Meadowtown Centre (far left of Figure).

Some of the large national brand retailers along Lougheed Highway include the Real Canadian Superstore, Winners, Cineplex Odeon, Candian Tire, Staples, Safeway, Save-on-Foods, Shoppers Drug Mart, and The Keg.

Rona, with approximately 55,000 square feet, is the largest retailer located in Maple Ridge along the Lougheed Corridor who's logo is not included in this image as its location is further west.

Other national retailers in the Meadowtown Centre include EB Games, JYSK, Pet Cetera, Sociabank, Vancity, Addition-Elle, Bombay, and Tim Hortons.

By comparison, the Town Centre has fewer national brands.

The major brands in the Town Centre include London Drugs, Save-on-Foods, Zellers, The Source, Shoppers Drug Mart, and Marks Work Wearhouse.

Coopers Foods, 24,000 square feet, is the most important retailers located east of the Town Centre at the intersection of Dewdney Trunk Road and 240<sup>th</sup> Street.



Much of the competitive retail supply for Maple Ridge resident spending comes from Langley and Coquitlam.

**Figure 6: Major National Retailers in and around Town Centre**



In the City of Langley, approximately 12 km south on 200<sup>th</sup> Street from Maple Ridge, many major retailers can be found. The competitive supply in Langley includes many large-format retailers as well as retailers that target younger shoppers that are not found in Maple Ridge, including:

*Costco; Wal Mart; Home Depot; Best Buy; The Bay; Earls; The Body Shop; American Eagle; Aeropostale; Le Chateau; La Senza; Jacob; West 49; Aldo.*

Before the Golden Ears Bridge was constructed, Maple Ridge residents would traditionally do much of their shopping in Coquitlam. The Coquitlam Centre is located on Lougheed Highway, along with some other large-format retailers. Some of the important retailers included in this node that cannot be found in Maple Ridge or Pitt Meadows include:

*The Bay; Sears (full size store); Best Buy; Chapters; H&M; Coast Mountain (Atmosphere); Crabtree & Evelyn; Gap; Old Navy; Guess?; RW & Co.; Lululemon; Sephora.*

Further west along the Lougheed Highway in Coquitlam is Ikea, which is major traffic generator.

## 5.4 MAPLE RIDGE RETAIL DEMAND

Having established what retail supply exists in Maple Ridge today and what the traditional shopping patterns have been, the next step is an analysis to determine how much of Maple Ridge's retail expenditures are currently leaking out of the community.

As noted in section 5.3, while the Maple Ridge retail landscape contains approximately 2.25 million square feet of space across all categories, the retail spending of Maple Ridge residents supports considerably more space.

By the end of 2010, the residents of Maple Ridge are projected to spend nearly \$781 million on retail goods and services.<sup>3</sup> By 2015, when the population of Maple Ridge is anticipated to be nearly 84,000, retail spending potential is expected to reach nearly \$919 million. By 2025 this figure is projected to increase to \$1.27 billion, and by 2035 it is expected to exceed \$1.7 billion.<sup>4</sup>

Table 5 below shows Maple Ridge total retail expenditures by retail category from 2010 to 2035.

**Table 5: Maple Ridge Total Retail Expenditures, 2010 to 2035**

<b>Maple Ridge Total Retail Expenditures* 2010 to 2035</b>						
	<b>2010</b>	<b>2015</b>	<b>2020</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>
Population	76,650	83,729	91,463	100,036	108,096	115,134
<b>Retail Categories</b>						
<b>Convenience Goods &amp; Services</b>	<b>\$344,817,076</b>	<b>\$405,774,454</b>	<b>\$477,507,987</b>	<b>\$562,632,357</b>	<b>\$654,948,052</b>	<b>\$751,501,735</b>
Grocery & Specialty Food	\$198,039,481	\$233,049,254	\$274,248,117	\$323,137,767	\$376,157,625	\$431,611,495
Pharmacy	\$16,985,143	\$19,987,807	\$23,521,287	\$27,714,379	\$32,261,703	\$37,017,785
Alcohol & Tobacco	\$42,646,737	\$50,185,903	\$59,057,857	\$69,585,980	\$81,003,521	\$92,945,213
Services	\$87,145,715	\$102,551,491	\$120,680,726	\$142,194,232	\$165,525,203	\$189,927,242
<b>Comparison Goods</b>	<b>\$336,887,496</b>	<b>\$396,443,069</b>	<b>\$466,526,983</b>	<b>\$549,693,791</b>	<b>\$639,886,550</b>	<b>\$734,219,838</b>
Apparel	\$63,475,387	\$74,696,679	\$87,901,692	\$103,571,746	\$120,565,610	\$138,339,621
Footwear & Fashion Accessories	\$19,519,373	\$22,970,043	\$27,030,728	\$31,849,440	\$37,075,238	\$42,540,940
Cosmetics, Health, Bath & Beauty	\$23,185,890	\$27,284,734	\$32,108,177	\$37,832,036	\$44,039,448	\$50,531,827
Jewellery & Accessories	\$12,176,034	\$14,328,535	\$16,861,559	\$19,867,434	\$23,127,247	\$26,536,710
Home/Portable Electronics & Appliances	\$86,262,002	\$101,511,553	\$119,456,946	\$140,752,291	\$163,846,671	\$188,001,258
Multimedia, Books & Music	\$18,494,459	\$21,763,943	\$25,611,412	\$30,177,105	\$35,128,510	\$40,307,222
Home Furnishings & Accessories	\$35,401,000	\$41,659,252	\$49,023,849	\$57,763,230	\$67,240,916	\$77,153,699
Home Improvement	\$46,573,210	\$54,806,505	\$64,495,297	\$75,992,742	\$88,461,493	\$101,502,654
Toys / Hobbies / Pets	\$20,521,188	\$24,148,960	\$28,418,057	\$33,484,085	\$38,978,093	\$44,724,318
Sporting & Recreational Goods	\$11,278,952	\$13,272,865	\$15,619,266	\$18,403,681	\$21,423,323	\$24,581,590
<b>Food &amp; Beverage</b>	<b>\$70,528,999</b>	<b>\$82,997,241</b>	<b>\$89,411,600</b>	<b>\$115,081,008</b>	<b>\$133,963,291</b>	<b>\$153,712,413</b>
Restaurants	\$59,888,035	\$70,475,149	\$75,921,751	\$97,718,323	\$113,751,768	\$130,521,269
Alcohol Sales - Pubs / Lounges / Restaurants	\$10,640,963	\$12,522,092	\$13,489,849	\$17,362,685	\$20,211,523	\$23,191,144
<b>Entertainment &amp; Leisure</b>	<b>\$28,536,661</b>	<b>\$33,581,423</b>	<b>\$39,518,007</b>	<b>\$46,562,801</b>	<b>\$54,202,740</b>	<b>\$62,193,411</b>
Movies / Events (Non-Sport)	\$8,180,821	\$9,627,041	\$11,328,927	\$13,348,512	\$15,538,711	\$17,829,457
Leisure & Recreation	\$20,355,840	\$23,954,381	\$28,189,080	\$33,214,289	\$38,664,029	\$44,363,954
<b>Total Retail Spending</b>	<b>\$780,770,231</b>	<b>\$918,796,187</b>	<b>\$1,072,964,577</b>	<b>\$1,273,969,957</b>	<b>\$1,483,000,633</b>	<b>\$1,701,627,398</b>
<b>Change</b>		<b>\$138,025,956</b>	<b>\$154,168,390</b>	<b>\$201,005,380</b>	<b>\$209,030,676</b>	<b>\$218,626,765</b>

\*Based on CANEX Canadian 2008 Estimates & GPRA Projections

<sup>3</sup> 44% spent on convenience goods/services, 43% on comparison goods, 9% on food and beverages, and 4% on entertainment and leisure.

<sup>4</sup> Growth of retail spending is a function of population growth and income/price inflation.

Retail spending potential of nearly \$781 million in 2010 translates to support for nearly 2.65 million square feet of retail space.<sup>5</sup> By 2025, the \$1.23 billion of retail expenditures will support approximately 3.46 million square feet of retail space. And by 2035, the anticipated \$1.7 billion of retail expenditure will support nearly 5.1 million square feet. See Table 6.

**Table 6: Maple Ridge Gross Retail Floor Area Supported, 2010 to 2035**

<b>Gross Retail Floor Area Supported (sq.ft.)*</b>						
	<b>2010</b>	<b>2015</b>	<b>2020</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>
<b>Retail Categories</b>						
<b>Convenience Goods &amp; Services</b>	<b>927,557</b>	<b>1,064,648</b>	<b>1,222,002</b>	<b>1,404,383</b>	<b>1,594,547</b>	<b>1,784,556</b>
Grocery & Specialty Food	392,148	450,106	516,632	593,738	674,134	754,465
Pharmacy	33,633	38,604	44,310	50,923	57,818	64,708
Alcohol & Tobacco	70,372	80,773	92,712	106,549	120,976	135,392
Services	431,404	495,165	568,349	653,174	741,619	829,991
<b>Comparison Goods</b>	<b>1,313,260</b>	<b>1,507,358</b>	<b>1,730,143</b>	<b>1,988,364</b>	<b>2,257,604</b>	<b>2,526,623</b>
Apparel	251,381	288,535	331,180	380,608	432,146	483,641
Footwear & Fashion Accessories	64,419	73,940	84,868	97,534	110,741	123,937
Cosmetics, Health, Bath & Beauty	76,519	87,829	100,810	115,855	131,543	147,218
Jewellery & Accessories	30,138	34,592	39,705	45,631	51,810	57,983
Home/Portable Electronics & Appliances	244,017	280,082	321,478	369,457	419,485	469,471
Multimedia, Books & Music	73,244	84,069	96,494	110,896	125,912	140,916
Home Furnishings & Accessories	140,199	160,920	184,703	212,270	241,013	269,732
Home Improvement	307,406	352,840	404,990	465,434	528,457	591,429
Toys / Hobbies / Pets	81,270	93,282	107,068	123,048	139,710	156,358
Sporting & Recreational Goods	44,668	51,270	58,847	67,630	76,788	85,938
<b>Food &amp; Beverage</b>	<b>267,275</b>	<b>306,778</b>	<b>322,348</b>	<b>404,673</b>	<b>459,469</b>	<b>514,220</b>
Restaurants	237,174	272,228	286,044	359,098	407,723	456,308
Alcohol Sales - Pubs / Lounges / Restaurants	30,101	34,550	36,303	45,575	51,746	57,912
<b>Entertainment &amp; Leisure</b>	<b>141,267</b>	<b>162,146</b>	<b>186,111</b>	<b>213,888</b>	<b>242,850</b>	<b>271,788</b>
Movies / Events (Non-Sport)	40,498	46,484	53,354	61,317	69,620	77,916
Leisure & Recreation	100,769	115,662	132,757	152,571	173,230	193,873
<b>Total Floor Area Supported</b>	<b>2,649,360</b>	<b>3,040,931</b>	<b>3,460,604</b>	<b>4,011,308</b>	<b>4,554,470</b>	<b>5,097,188</b>
<b>Change</b>		<b>391,571</b>	<b>419,673</b>	<b>550,704</b>	<b>543,162</b>	<b>542,718</b>

\*Based on CANEX Canadian 2008 Estimates & GPRA Projections

So what does this mean?

- The combination of 2010 retail space inventory (2.25 million sq.ft.) and retail spending data translated into square feet supportable (2.65 million sq.ft.) shows us that in 2010, there is retail spending leakage of approximately \$166 million (see Table 7 below);
- That retail spending leakage supports nearly 400,000 square feet of retail space across all categories outside of Maple Ridge;
- If no additional retail space were constructed in Maple Ridge and retail performance of all existing tenants remained the same (except for inflation), retail spending leakage would reach nearly \$460 million by 2020. This is enough to support over 1.2 million square feet of retail space across all categories.

<sup>5</sup> It must be kept in mind that this represents the TOTAL amount of space supportable in ALL locations, not just in Maple Ridge. A portion of these dollars cannot be recaptured.

Table 7: Retail \$ Inflow/Outflow by Category, 2010<sup>6</sup>

Maple Ridge Estimated Inflow/Outflow, 2010	
	Est. \$ Inflow/Outflow**
<b>Retail Categories</b>	
<b>Convenience Goods &amp; Services</b>	<b>-49,491,000</b>
Grocery & Specialty Food	-52,521,000
Pharmacy	3,030,000
Alcohol & Tobacco	-19,998,000
Services	19,998,000
<b>Comparison Goods</b>	<b>-134,385,000</b>
Apparel	-25,756,000
Footwear & Fashion Accessories	-12,423,000
Cosmetics, Health, Bath & Beauty	-16,968,000
Jewellery & Accessories	-3,232,000
Home/Portable Electronics & Appliances	-67,874,000
Multimedia, Books & Music	-2,778,000
Home Furnishings & Accessories	-253,000
Home Improvement	3,485,000
Toys / Hobbies / Pets	-3,283,000
Sporting & Recreational Goods	-5,303,000
<b>Food &amp; Beverage</b>	<b>16,868,000</b>
Restaurants	7,323,000
Alcohol Sales - Pubs / Lounges / Restaurants	9,545,000
<b>Entertainment &amp; Leisure</b>	<b>1,010,000</b>
Movies / Events (Non-Sport)	-8,080,000
Leisure & Recreation	9,090,000
<b>Total</b>	<b>-165,998,000</b>
Source: District of Maple Ridge; G.P. Rollo & Associates Ltd.	
**Positive \$ figures = inflow; negative \$ figures = outflow.	

This leads to very practical questions relating to the Albion Flats: how much retail outflow spending could be recaptured by construction of retail at the Albion Flats, and how does timing of development play into different recapture scenarios?

## 5.5 RETAIL POTENTIAL AT ALBION FLATS

Under a hypothetical (and unrealistic) scenario in which all new retail space supportable by Maple Ridge retail dollars were captured in Maple Ridge and allocated exclusively to the Albion Flats over the next 10 years, over 811,000 square feet of space across all categories could be justified.<sup>7</sup>

However, realistically there will always be a significant portion of retail spending outflow that cannot be recaptured due to the attraction of destination shopping and entertainment areas (e.g. Downtown Vancouver), proximity of shopping areas outside the District to residences within the district (e.g. residents at Western edge of District), daytime spending while at work outside the District,

<sup>6</sup> The only categories where there is net inflow of dollars to Maple Ridge are: pharmacy, general personal services, home improvement and restaurants/pubs/lounges. Much of that inflow is likely a function of both daytime employee spending and tourist dollars during the peak summer season.

<sup>7</sup> Future retail demand is a function of both population growth and outflow spending recapture.



and spending while travelling. A 'healthy' level of outflow is 15% to 20% of total spending potential.

Based on our analysis of Albion Flats' visibility, accessibility, driving distances from population and employment centres and location vis-à-vis other shopping centres in the area, we believe that retail development at the Flats could lead to recapture of outflow spending in the range of 10% to 30%. The following three scenarios are a function of the different competitive scenarios that could emerge.

**Scenario 1:** *300,000+ square feet are constructed at Kwantlen by 2012 and the Albion Flats come on stream shortly thereafter.*

- Here we assume that the Kwantlen project's 300,000+ square feet lead to significant recapture of retail leakage, creating larger pool of retail dollars within the District that a new centre could draw from;
- Albion Flats retail would capture a small share of Maple Ridge retail spending (not more than 3% in any category, and 1% in most categories);
- We believe that a **20-30% retail leakage recapture rate** is realistic in this scenario;
- The combination of 20-30% outflow recapture and small allocation of Maple Ridge retail dollar share to the Albion Flats would allow for **between 140,000 and 192,000 square feet of retail at Albion Flats by 2015, and between 297,000 and 426,000 by 2025.**

**Table 8: Retail Space Supportable at Albion Flats, Scenario 1**

Retail Space Supportable at Albion Flats, 2013 to 2029 (sq.ft.)* 10 to 30% retail spending recapture scenarios + Opening of Kwantlen Shopping Centre in 2012									
	2013	2015	2017	2019	2021	2023	2025	2027	2029
<b>Retail \$ Leakage Recapture</b>									
10%	77,000	85,000	98,000	112,000	129,000	149,000	171,000	193,000	215,000
15%	100,000	112,000	130,000	152,000	175,000	205,000	237,000	269,000	301,000
20%	123,000	139,000	161,000	189,000	216,000	256,000	297,000	339,000	381,000
25%	146,000	166,000	193,000	228,000	261,000	310,000	362,000	414,000	466,000
30%	169,000	192,000	225,000	266,000	306,000	365,000	426,000	488,000	551,000

\*Based on CanEx 2008 spending data. Analysis by G.P. Rollo & Associates Ltd.

**Scenario 2:** *300,000+ square feet are constructed at Kwantlen by 2012, 400,000 square feet are constructed east of Harris Road in Pitt Meadows, and Albion Flats comes on stream around 2017.*

- As above, we assume that the Kwantlen project leads to significant recapture of retail leakage in 2012;
- However, a large addition of retail space in Pitt Meadows, within a 10 minute drive of the large population base of west Maple Ridge, creates greater difficulties for a centre at Albion to recapture spending leakage;
- We believe that **10-15% retail leakage recapture** is realistic;
- Again we maintain a capture of a small share (not more than 3% in any category and 1% in most categories) of retail dollars from within the Maple Ridge market;
- Under this scenario, the Albion Flats could sustain **between 85,000 and 112,000 square feet of retail space by 2015, between 129,000 and**



175,000 square feet by 2021, and between 171,000 and 237,000 square feet by 2025.

**Table 9: Retail Space Supportable at Albion Flats, Scenario 2**

Retail Space Supportable at Albion Flats, 2013 to 2029 (sq.ft.)*									
10 to 30% retail spending recapture scenarios + Opening of Kwantlen Shopping Centre in 2012									
	2013	2015	2017	2019	2021	2023	2025	2027	2029
<b>Retail \$ Leakage Recapture</b>									
10%	77,000	85,000	98,000	112,000	129,000	149,000	171,000	193,000	215,000
15%	100,000	112,000	130,000	152,000	175,000	205,000	237,000	269,000	301,000
20%	123,000	139,000	161,000	189,000	216,000	256,000	297,000	339,000	381,000
25%	146,000	166,000	193,000	228,000	261,000	310,000	362,000	414,000	466,000
30%	169,000	192,000	225,000	266,000	306,000	365,000	426,000	488,000	551,000

\*Based on CanEx 2008 spending data. Analysis by G.P. Rollo & Associates Ltd.

**Scenario 3a:** Only Albion Flats are constructed, without new competitive retail at Kwantlen Lands or along Lougheed Highway in Pitt Meadows.

- If Albion Flats were the only new major retail project in the area, then the retail dollars that would have otherwise been recaptured by Kwantlen would still be flowing out of the community and available for recapture by other projects.
- Under this scenario, a leakage recapture rate of 25% to 30% is likely;
- Recaptured retail dollars could sustain between **226,000 and 264,000 square feet by 2015 and between 444,000 and 524,000 square feet by 2025.**

**Table 10: Retail Space Supportable at Albion Flats, Scenario 3a**

Retail Space Supportable at Albion Flats, 2013 to 2029*									
10 to 30% retail spending recapture scenarios + no Kwantlen Shopping Centre									
	2013	2015	2017	2019	2021	2023	2025	2027	2029
<b>Retail \$ Leakage Recapture</b>									
10%	99,000	111,000	125,000	141,000	160,000	181,000	203,000	226,000	249,000
15%	132,000	149,000	169,000	193,000	221,000	251,000	283,000	317,000	351,000
20%	165,000	187,000	214,000	245,000	281,000	321,000	363,000	407,000	452,000
25%	199,000	226,000	259,000	296,000	342,000	391,000	444,000	498,000	553,000
30%	232,000	264,000	303,000	348,000	403,000	462,000	524,000	589,000	654,000

\*Based on CanEx 2008 spending data. Analysis by G.P. Rollo & Associates Ltd.

**Scenario 3b:** Albion Flats are constructed, without new competitive retail at Kwantlen Lands or along Lougheed Highway in Pitt Meadows, **and higher percentage of market share captured from existing retailers (5% in all categories).**

- It is unlikely that retail leakage recapture rates will exceed 30%; in order to maintain a reasonable outflow allowance of 15 to 20% of retail dollars, recapture rates cannot be set higher than 30%.
- Given a 30% 'cap' on retail outflow recapture, support for larger amounts of retail space at the Albion Flats would require a greater

capture of retail dollars already circulating within the Maple Ridge market.

- Under a scenario where between 25% and 30% of retail outflow spending is recaptured, and approximately 5% of Maple Ridge retail spending is diverted to the Albion Flats (versus approximately 1% in all other scenarios), a shopping centre of between **340,000 and 379,000 square feet of retail space could be sustained by 2015. By 2025, a centre of 586,000 to 667,000 square feet could be sustained.**
- Capture of more than 5% of market share in any given category from existing Maple Ridge businesses would likely have negative implications for the health and vitality of businesses in the Town Centre and elsewhere in the District.

**Table 11: Retail Space Supportable at Albion Flats, Scenario 3b**

<b>Retail Space Supportable at Albion Flats, 2013 to 2029*</b>									
10 to 30% retail spending recapture scenarios + no Kwantlen Shopping Centre + higher capture of market share from existing businesses									
	2013	2015	2017	2019	2021	2023	2025	2027	2029
<b>Retail \$ Leakage Recapture</b>									
10%	211,000	225,000	244,000	264,000	290,000	317,000	346,000	376,000	406,000
15%	244,000	264,000	288,000	316,000	350,000	387,000	426,000	467,000	508,000
20%	277,000	302,000	333,000	368,000	411,000	457,000	506,000	557,000	609,000
25%	310,000	340,000	378,000	420,000	472,000	527,000	586,000	648,000	710,000
30%	343,000	379,000	422,000	472,000	532,000	597,000	667,000	738,000	811,000

\*Based on CanEx 2008 spending data. Analysis by G.P. Rollo & Associates Ltd.

## 5.6 ALBION FLATS & THE TOWN CENTRE: CHALLENGES AND OPPORTUNITIES

Discussion of locating retail uses at the Albion Flats has been a contentious issue in part due to concerns around the potential affects it may have on the Town Centre. Concerns have been raised that a large new shopping centre on the Lougheed could attract both business and shoppers away from the Town Centre, or could prolong the number of years it might take to revitalize the core.

While GPRA has not undertaken a comprehensive “impact study” as part of this report, (indeed without an understanding of the tenant mix at Albion or Kwantlen such an impact study is not yet feasible), we do offer a number of comments relating to competitive considerations for the Town Centre in relation to the Albion Flats.<sup>8</sup>

### 5.6.1 Objectives for the Town Centre

The District of Maple Ridge has outlined a number of objectives and policies relating to Town Centre commercial in the Town Centre Area Plan. These include:

- Policy 3-1: *An increase in...commercial density is encouraged in the Town Centre...*
- Policy 3-3: *Commercial uses that support the residential population of the Town Centre through the provision of necessary goods, including food, and services such as*

<sup>8</sup> “Impact” refers to the loss of sales at an existing retail store due to an increase in the level of competition.

*medical care are a priority function and will be encouraged to develop or remain in and around the Central Business District.*

- Objective (p.28): *Intent to create a compact and vibrant commercial area that is pedestrian-oriented.*
- Policy 3-27: *Retail, service and entertainment uses...shall be encouraged...*
- Policy 6-22: *Outside the existing Urban Area Boundary, commercial uses... are not supportable and will be considered premature prior to the development and implementation of a comprehensive strategy outlined in Section 11.1.3. In the long term, prior to considering large scale commercial development outside the existing Urban Area Boundary... the District will determine specific success criteria for the Town Centre based on.... number of housing units constructed, amount of commercial development, and the vibrancy of the Town Centre as outlined by criteria.*

These indicate a need to consider all retail developments in the District in relation to the Town Centre's health and vitality.

#### 5.6.2 *Status of the Town Centre*

The Maple Ridge Town Centre today faces strong retail competition from modern shopping centres and large and medium format retailers located in Maple Ridge, Coquitlam, Langley and across the Metro region.

The Town Centre has lost a number of its core retail anchors of the past, and the few that remain do not necessarily offer the magnetism to keep people from driving west to Pitt Meadows and Coquitlam or south to Langley for shopping. Furthermore, new large and medium format retail entrants to the Maple Ridge market do not appear to currently want to locate in the Town Centre for a variety of reasons, ranging from lack of traffic and visibility vis-à-vis highway locations, to the difficulties presented by fragmented property ownership.

The Town Centre has also faced a number of other factors, including:

- Limited residential density in the Town Centre;
- Restrictive covenants at key shopping centre sites, preventing full utilization of strategic locations;
- An aging enclosed shopping centre at 224<sup>th</sup> and Lougheed (Haney Place Mall) which is no longer generating sufficient traffic for other businesses in the area;
- Haney Place Mall having poor linkages to other retail and non-retail uses in the area;
- Significant retail development to the west in the Lougheed Corridor, including relocation of Safeway from Haney Place Mall;
- The downtown core has lost tenants over the years to shopping centres near the western boundary of the District and elsewhere;

- Haney Bypass diverts traffic around the Town Centre;
- Lack of a concentrated commercial precinct in the Town Centre.

The Town Centre does have a number of factors that could form a baseline for future revitalization. These include:

- Significant population growth potential;
- Significant non-retail anchors (e.g. leisure, cultural and institutional);
- Relatively low rental rates compared to shopping centres, which benefits incubator and start-up businesses and local independents;
- Grid pattern and sidewalks creating prerequisites for an attractive pedestrian environment, including upgrades at 224<sup>th</sup> and attractive public spaces.

Downtown revitalization projects are long, multi-faceted and complicated processes, often taking 10-20 years or longer before significant progress is visible. This process is currently under way in Maple Ridge where significant steps have already been taken including:

- Creation of a strong vision and Area Plan for the Town Centre
- Support for the Maple Ridge BIA
- Tax-exemption By-law
- Public space improvement
- Reduction in Development Cost Charges
- Increase in residential development
- Sidewalk improvements

The key for Maple Ridge Town Centre will be to play on its strengths and seek to complement rather than compete with shopping centres at highway locations. By building on its non-retail anchors in the leisure, cultural and institutional categories, the Town Centre will offer a compelling place for people to come visit.

All stakeholder groups involved in the Town Centre, including retailers, property owners and the District, have to work together to facilitate change, and this is currently underway.

### 5.6.3 *Albion Flats and the Town Centre*

This section discusses what new commercial development in Maple Ridge will mean for the Town Centre, and the challenge to maintain and increase its health and vitality in the coming years.

In our opinion, the Town Centre faces a number of challenges but also opportunities in the face of Kwantlen and Albion Flats retail development.

If the Kwantlen project proceeds and an additional 130,000 to 175,000 square feet of retail space are constructed at the Albion Flats in the coming decade (consistent with Scenario 2 above), the implications for the Town Centre may include the following:

- Depending on the tenant mix at Albion Flats and Kwantlen, there may be some competitive implications for larger retailers such as the Zellers at

Haney Place Mall, London Drugs, and Save-on-Foods. This is attributable to the fact that large format retail tends to compete primarily with like stores, and less so with small local specialty stores.

- Implications for existing small businesses will be mixed. On the one hand, retail businesses in the Town Centre have already experienced the opening of other shopping centres within the catchment area and are unlikely to be adversely influenced by another new market entrant. On the other hand, depending upon the tenant mix of both Kwantlen and Albion Flats, there will be a small number of businesses whose sales volumes could be affected – this is the nature of a competitive market with new competitors selling similar products. The challenge for existing businesses is to review their products, services and promotion strategies to better compete. Most will rise to the occasion and survive the entry of new competitors.
- There are certain retail categories, such as specialty retail and ethnic retail that prove to be especially resilient to competition from large shopping centres and benefit from lower rents in the Town Centre. Specialty retail is typically a common retail category for Town Centres.
- There will be pressure from existing and new Maple Ridge shopping centres with vacant space to attract downtown businesses. Both national retailers and successful independent retailers could be targeted by leasing agents to move into new shopping centres. Higher rental rates in new projects will cause the majority of businesses to stay in the Town Centre. As mentioned above, downtown businesses with an interest in considering alternate locations have already moved and there are not many left who are able and interested in paying the higher rents associated with new shopping centre development. However, with the potential for some downtown businesses to be offered financial incentives (tenant improvement allowance, free rent period, initially low rents) to move to new shopping centres, there undoubtedly will be interest from a small number of businesses to consider such relocations.
- It is unlikely that large and medium format retailers will consider a downtown location. This is largely attributable to the high cost of land and difficulty in assembling the large number of parcels for new development. Retail development at the Albion Flats and Kwantlen lands provides an alternative that is more affordable and creates synergy between these retailers (cross shopping experiences) locating in close proximity to each other.
- Additional residential development in the downtown will enhance the viability of downtown retail and service businesses. However, the pace of new residential development will have a significant impact on the downtown commercial market. As new residential development evolves, it will reinforce the potential downtown businesses to offer convenience retail and services to cater specifically for the downtown. And as new residential development occurs, the downtown will increasingly be viewed as a place to live, work and play increasing opportunities for existing and new commercial businesses in the downtown.
- Built form matters. Historically, the downtown is where one could have a pedestrian-oriented shopping experience. If either or both Kwantlen and Albion Flats shopping centres offer a pedestrian-oriented

experience (i.e. a pedestrian 'high street' concept), this could give them a competitive edge over the Town Centre for attracting retail dollars. This could be countered by downtown businesses and the District working together to create competitive built-forms and streetscape environments that are similarly attractive to Maple Ridge shoppers.

If the Kwantlen project proceeds and 250,000 or more square feet of retail space are constructed at the Albion Flats over the next decade, implications for the Town Centre would remain as above, with the addition of more opportunities for users to locate outside of the Town Centre. Again, if either or both new centres create a pedestrian-oriented shopping experience in the form of a lifestyle centre or high-street-type environment, this would give them a competitive edge and likely attract more spending.

Overall, the merchandising strategy for the Kwantlen Shopping Centre is focussed almost exclusively on attracting large and medium format national and regional chains and ancillary commercial retail units (CRU's). The merchandising strategy for a shopping centre at the Albion Flats would likely be similar. This presents an opportunity for the Town Centre to focus on a more unique mix of strong independent retailers, taking advantage of the lower rental rates and operating costs.

There is also an excellent opportunity at hand for Maple Ridge Town Centre to become a focal point for leisure, recreation, independent retailers and food & beverage services. Amenities and public gathering places are increasingly being considered the 'new anchors' of successful downtowns in medium-sized cities. Maple Ridge already possesses some of the unique starting points to create such a hub, including excellent outdoor gathering spaces and recreational amenities.

The Town Centre could also focus to a greater extent on who it serves day-to-day (i.e. downtown workers and nearby residents). By creating a mix of uses that serve workers during the day and residents in the evenings and weekends, downtown can become a vibrant all-hours hub.

## 5.7 COMPLEMENTARY LAND USES

Retail development at the Albion Flats does not necessary need to be a stand-alone use. Retail could work with a number of other land uses in the following ways:

**Recreational:** An expansion of recreational facilities at the Albion Flats could be done in conjunction with small or large-scale retail development. Other communities (e.g. Prince George) have shown that there are generally no major issues locating recreational uses next to large scale retail.

**Residential:** Regulatory issues aside, residential is a good complementary use to small, medium or large-scale retail development. Retail could be integrated with residential in the form of a neighbourhood-serving commercial centre, medium/large-scale lifestyle centre or power centre, or some combination that includes a mixed-use high street environment and good connections/interfaces between residents and businesses.

**Industrial:** Light industrial development could complement a retail centre at the Albion Flats.

**Agricultural:** Agricultural uses next to retail development would not pose significant short term issues. Retail beside agricultural could result in longer term development pressure on agricultural lands, but this could be alleviated by a strong commitment to indefinite agricultural uses on the site from the ALC and the District of Maple Ridge. Large parking lots could create drainage issues for agricultural lands.

## 5.8 LOCATING RETAIL AT THE ALBION FLATS: STRENGTHS AND WEAKNESSES

There are a number of key strengths and weaknesses that must be considered when debating whether retail is an appropriate use at the Albion Flats. These are presented in the table below.

**Table 12: Retail Strengths & Weaknesses at the Albion Flats**

RETAIL USES AT ALBION FLATS			
Criteria	Strengths	Weaknesses	Placement
<b>OCP, Neighbourhood Plans</b>	Nothing Significant	Inconsistent with the current OCP policies	Retail uses in the small node at the south-east corner of the Albion Flats would not require removal of land from ALR
<b>Metro Vancouver: LRSP and Draft RGS</b>	Designated as a 'Special Study Area' by the Draft RGS, which allows for re-designation with only a 50% + 1 vote from the Metro Vancouver Board.	Inconsistent with Metro Vancouver designation of Albion Flats (green zone, agricultural).	
<b>ALR</b>	Nothing Significant	Not an approved use of ALR lands. Would require removal of lands from the ALR.	
<b>Tax Implications</b>	Provides new source of business tax revenue for the District.	Nothing Significant	
<b>Strategic Considerations</b>	Major retailers look for highway locations due to visibility and ease of access/egress. Albion Flats provide both. Also, Albion Flats is 10-15 minutes by car from major population concentration in West MR. Would also help to serve historically underserved east MR.	The site would require significant fill given its location within the floodplain, as well as servicing extensions prior to construction.	Location along the Lougheed Highway would provide good visibility and access. Any configuration of retail would work at the Flats, from small neighbourhood-serving node to large community-serving shopping centre.
<b>Employment</b>	Will provide some short-term employment during planning and construction, and long-term service sector jobs.	Provides fewer full-time and high paying employment opportunities than would industrial or business park uses.	Placement of retail uses in areas south of 105th Avenue could allow for areas of higher agricultural potential north of 105th to be preserved.
<b>Environmental Protection</b>	Removal of lands from ALR for shopping centre construction could be done as part of a trade-off leading to higher quality lands elsewhere being placed within the ALR, or other lands being upgraded for greater agricultural production potential.	Could require removal of high quality agricultural lands north of 105th Avenue from farm use.	
<b>Town Centre Implications</b>	Nothing Significant	Pre-empting retailers from possibly considering the Town Centre. Could attract shoppers and businesses from the Town Centre.	



## 6.0 AGRICULTURAL LAND USES AT THE ALBION FLATS

Most of the Albion Flats today resides within the ALR. The site is designated as "Agricultural Lands in the Green Zone" in the Metro Vancouver Livable Region Strategic Plan, and according to the ALC it contains significant agricultural potential on the lands north of 105<sup>th</sup>. The intent of this section is to consider the future for potential agricultural uses at the Albion Flats.

### 6.1 AGRICULTURAL REVIEW

Approximately 89% or 276 acres of the Albion Flats are within the Agricultural Land Reserve (ALR). The map below displays the boundaries of the ALR on the Albion Flats.

Figure 7: Albion Flats Agricultural Lands



Any development on ALR lands would require the Agricultural Land Commission (ALC) to exclude the Flats from the ALR, or permit additional "non-farm uses" (e.g. recreational).

The ALR lands do allow for commercial uses if 50% of products are produced on site. Examples of commercial uses that have proven successful in other ALR locations have been wine, cheese making, or vegetable stands.

The lands where the Albion Sports Complex, Planet Ice, and the Golden Ears Curling Club are located currently reside within the ALR. Their construction was approved by the ALC as an appropriate non-farm use for ALR lands.

### ***Maple Ridge Agricultural Plan, 2009***

The future of the agricultural sector in Maple Ridge was assessed in a report entitled *The Maple Ridge Agricultural Plan* (2009) produced by the Agricultural Advisory Committee (AAC) for the District of Maple Ridge. The AAC included representatives from the farming community, District Council, Agricultural Land Commission, and members of the Maple Ridge community. The report highlighted a number of issues and provided a series of recommendations for the agricultural sector. Some key issues relating to agricultural uses on the Albion Flats include:

- The need to gain access to underutilized agricultural lands. Many agricultural lands in Maple Ridge are not being used for agricultural purposes;
- The need to consolidate agricultural lands, and to address the impacts that land speculation can have on agricultural growth;
- Loss of agricultural land base;
- Gaps in the local food system infrastructure, including the local marketing system and issues with flood control;
- ‘Stress’ in the Agricultural-Residential interface.

The *Maple Ridge Agricultural Plan* also offers a series of recommendations of relevance to the Albion Flats:

- Promote the importance of agriculture to Maple Ridge residents to raise awareness;
- Implement OCP policies to protect agricultural land base to minimize encroachment of non-agricultural uses on agriculturally designated lands;
- Require compensation from agricultural land conversion to increase the agricultural capacity of the District;
- Promote opportunities for urban agriculture;
- Consolidate smaller adjacent parcels with agricultural potential to allow for more efficient farming;
- Investigate potential for local marketing cooperatives as well as shared industrial infrastructure;
- Look to increasingly incorporate agriculture in economic development strategies.

### ***Census of Agriculture***

The Federal Government completes an Agriculture Census, administered in typical census years. The Agriculture Census tracks land that is actively being used for agriculture purposes and does not track ALR land that is not being used for agriculture purposes.

- The 2006 Census of Agriculture indicated there was 1,923 hectares (4,752 acres) of agriculture land in Maple Ridge;
- The average area for farms in Maple Ridge was 9 hectares (22.2 acres);
- Total value of farm receipts in 2006 was \$34.5 million, a decrease of just under 12% from the 2001 (\$39.2 million);
- The 2006 Census indicated that Maple Ridge had 213 census farms, while in 2001 there were reportedly 237 farms.
- The total number of farm operators in 2006 was 310.

## 6.2 OPPORTUNITY FOR AGRICULTURAL USES ON ALBION FLATS

In conversations with the ALC regarding the Albion Flats, Commission officials noted that lands north of 105<sup>th</sup> Avenue on the Flats have significantly higher soil quality than lands south of 105<sup>th</sup>. This assessment could play a role in future ALC deliberations over ALR land exclusion applications. It also points to where greatest potential exists to increase farmland productivity on site.

However, it was also suggested nearby development maybe influencing seasonal flooding issues which occur on the north end of the site. Bringing these lands to their optimal agricultural productivity potential would require rectification of these issues.

Given the agricultural quality of Albion Flats lands north of 105<sup>th</sup> Avenue, if some Albion Flats lands south of 105<sup>th</sup> Avenue are approved for non-farm use or exclusion from the ALR, the ALC has suggested it would like to see investment to improve drainage on lands north of 105<sup>th</sup> Avenue. A recent agrology report commissioned by the District suggests that with improved drainage could possibly improve the classification of the agricultural lands.

The ALC has also mentioned that ideally it would prefer to see ownership consolidation of the smaller sites on the Albion Flats to make for more efficient agricultural use.

### 6.3 COMPLEMENTARY LAND USES

**Recreational:** The District is looking to expand the recreational facilities on the Albion Flats, based on the *Parks, Recreation and Culture Master Plan*. Providing that these recreational expansion are approved by the ALC (non-farm uses), there would seem to be no major issues locating recreational uses next to active agricultural lands.

**Residential:** An issue raised in the Maple Ridge Agricultural Plan was urban encroachment upon agricultural lands and increasing issues with nearby residents. These issues raise the possibility that residential and agricultural uses might not work well together as adjacent land uses on the Albion Flats, and buffers are recommended to separate residential and agricultural uses.

**Industrial:** The stated need for additional agri-industrial infrastructure suggests that agricultural and industrial uses could work well side by side.

**Commercial:** Commercial uses adjacent to agricultural lands likely would not pose significant short-term issues. Adjacent commercial development could result in longer term development pressures on agricultural lands, but this could likely be alleviated by a strong commitment to agricultural uses on the site from the ALC and the District. The large parking lots associated with shopping centres could create drainage issues.

#### 6.4 STRENGTHS & WEAKNESSES OF AGRICULTURAL USES AT ALBION FLATS

There are a number strengths and weaknesses to retaining agricultural uses on the Albion Flats. The table below offers the strengths and weaknesses of agricultural land use on the Albion Flats based on different criteria.

**Table 13: Strengths & Weaknesses of Agricultural Uses at Albion Flats**

<b>Agricultural</b>			
<b>Criteria</b>	<b>Strengths</b>	<b>Weaknesses</b>	<b>Placement</b>
<b>OCP, Neighbourhood Plans</b>	The OCP respects the Regional designation of the Albion Flats as a Green Zone.	N/a	Most of the Albion Flats are within the ALR, but the ALC suggested the soils north of 105th are best suited to agriculture.
<b>Metro Vancouver: LRSP and Draft RGS</b>	Agriculture use on the Albion Flats is consistent with the LRSP and the Draft RGS.	The Draft RGS will allow re-designation with only a 50% + 1 vote from the Metro Vancouver Board with no public hearing.	
<b>ALR</b>	Most of the site is within the ALR and the ALC considers the soils good agricultural potential.	Urban encroachment can reportedly cause issues with agricultural users.	
<b>Tax Implications</b>	Nothing significant	Low tax base for District.	
<b>Strategic Considerations</b>	Consistent with District Agricultural Plan's calls for preservation of agricultural land base.  ALC suggested the lands north of 105th Avenue have the best soils on the Albion Flats for agriculture.  Agricultural uses are well suited to land situated within the Fraser River floodplain.  Regional goals call for protecting agricultural lands.	Agricultural lands would ideally need to be consolidated. Efficient agricultural use is more difficult on smaller lots.  Speculation on the land has driven up the value of agricultural lands.  Current drainage issues at Albion Flats must be resolved to capitalize on soil potential	
<b>Employment</b>	Promotes agricultural service sector. Value added agriculture could create additional employment.	Traditional agriculture may not provide significant new diversified job opportunities depending on product.	
<b>Environmental Protection</b>	Preserves greens space. Environmentally sensitive areas can be protected.	Nothing significant	
<b>Town Centre Implications</b>	No negative impact on Town Centre.	Nothing significant	

Agricultural lands are protected by ALC and Metro Vancouver by-laws which consider agriculture necessary for the long-term health of the Metro Region.

## 7.0 RECREATIONAL AND COMMUNITY LAND USES AT THE ALBION FLATS

### 7.1 RECREATIONAL & COMMUNITY LAND OVERVIEW

Currently the Albion Flats include the Albion Sports Complex, Planet Ice, Golden Ears Winter Club, as well as the Albion Fairgrounds.

All these uses occur on ALR lands and are allowed by the ALC as approved non-farming uses.

The Districts of Maple Ridge and Pitt Meadows coordinated to produce a Parks, Recreation and Culture Master Plan (March 2010), which outlines the District's goals for public facilities.

Recommendations from the report include specific goals for the Albion Flats. An image of the proposed new recreational facilities based on a 2002 concept plan. Recommendations for recreational and community facilities include:

- Adding 2 new baseball diamonds and 2 new soccer fields, including a soccer field surrounded by an outdoor running track and bleachers for 2,500 spectators.
- A new indoor multi-purpose facility. The indoor facility is still under consideration and would be located atop two existing all-season fields.
  - If the expansion plans go ahead without the indoor facility, two new grass fields are planned for the site.
  - Potential uses in the new facility could be a 'field-house' with an indoor soccer field, a running track, activity space, as well as a fitness centre (weight and exercise room).
- Additional parking space
- Skateboard park / youth centre
- Community Garden
- New buildings for the Albion Fairgrounds.

It is suggested that a new sheet of ice will soon be required in Maple Ridge / Pitt Meadows to maintain the target ratio of one ice sheet per 18,400 residents. The report suggested Planet Ice on the Albion Flats could possibly be renovated to include an additional sheet.

## 7.2 FUTURE FOR RECREATIONAL & COMMUNITY USES ON ALBION FLATS

The Albion Flats are already a very important location for recreational and community uses for Maple Ridge and Pitt Meadows.

The Parks, Recreation and Culture Master Plan outline specific targets based on population for recreational facilities. In order to meet these targets new facilities will be needed as Maple Ridge and Pitt Meadows grow. This is particularly true of eastern Maple Ridge, which is expected to see significant population growth in the coming years.

With much of the District's field space currently operating at capacity, the Recreation Master Plan cites the urgent need for additional space.

Any new recreational uses of lands at the Albion Flats would require approval from the ALC for non-farm uses of ALR land.

## 7.3 COMPLEMENTARY LAND USES

- Agricultural:** Future construction of recreational and cultural facilities will need to consider water table impacts. Otherwise, agricultural and recreational uses should not have any conflicts.
- Residential:** Residential and recreational uses have strong synergies as adjacent uses, especially for seniors and families.
- Industrial:** As long as the industrial uses are light-industrial in nature, there should not be any conflict between industrial and recreational uses.
- Commercial:** Commercial uses adjacent to recreational uses would be able to capitalize on the traffic generated by recreational facilities. Convenience or Food & Beverage uses would be best suited to a recreational area.

### 7.3 STRENGTHS & WEAKNESSES OF RECREATIONAL USES AT ALBION FLATS

There are a number strengths and weaknesses to expanding recreational and cultural uses on the Albion Flats. The table below offers the strengths and weaknesses of recreational and cultural land uses on the Albion Flats based on different criteria:

**Table 14: Strengths and Weaknesses of Recreational Uses at Albion Flats**

Recreational			
Criteria	Strengths	Weaknesses	Placement
<b>OCP, Neighbourhood Plans</b>	Expansion of recreational facilities is promoted by District plans.	Nothing Significant	Recreational uses are planned to be adjacent to existing facilities on lands that currently include some private ownership.
<b>Metro Vancouver LRS and Draft RGS</b>	Already was accepted as a 'Non-Farm' use of ALR lands by the ALC.	Nothing Significant	
<b>ALR</b>	Would not require removal of lands from the ALR	Requirement of ALC approval for non-farm uses	
<b>Tax Implications</b>	n/a	Provides little to no tax revenue.	
<b>Strategic Considerations</b>	Builds on existing recreational facilities base already existing at Albion Flats	Requirements for more surface parking	
	Expanded recreational facilities could provide a regional draw for tournaments, etc.	Recreational facilities such as the planned multi-purpose facility make excellent anchors in Town Centres	
	Low density recreational facilities are a suitable use for lands in a floodplain	Development of the Ice Palace has reportedly had a negative impact on the water flows on the Albion Flats.	
	Continues in tradition of recreation and family activity at Albion Flats		
<b>Employment</b>	Traffic created by recreation facilities could promote nearby retail and other services.	Will create few direct jobs.	
<b>Environmental Protection</b>	Recreational and cultural uses are less invasive than other uses and would be suitable next to environmentally sensitive areas.	Nothing Significant	
<b>Town Centre Implications</b>	Would help enhance & promote Maple Ridge as family-friendly, healthy, sustainable community	Recreational / public amenities are important uses in the Town Centre, location of a new facility at Albion would preclude its location in the Town Centre.	



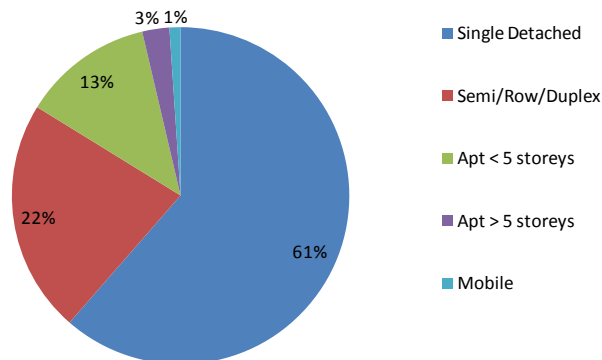
## 8.0 RESIDENTIAL DEMAND ANALYSIS & IMPLICATIONS FOR THE ALBION FLATS

### 8.1 RESIDENTIAL OVERVIEW

As of the last Federal Census in 2006, the District of Maple Ridge had an average household size of 2.9 (compared to 2.6 for Metro Vancouver), and 24,480 total dwelling units.

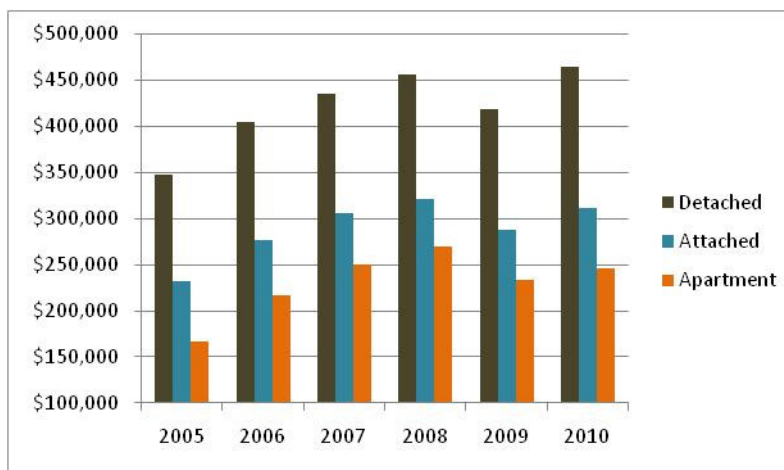
Single-detached homes are by far the most common type of home in Maple Ridge, accounting for 61% of all dwelling units. Other ground-oriented units (such as duplexes, row houses, or town homes) made up 23% of dwelling units, while apartments with less than 5 storeys accounted for an additional 13% of homes in Maple Ridge. The remaining housing stock was split between apartments over 5 storeys (3%) and mobile homes (1%).

**Distribution of Maple Ridge Dwelling Units by Structure Type, 2006**



According to the Real Estate Board of Greater Vancouver, the Benchmark Price for a single-family home in Maple Ridge was \$464,125 in mid-year 2010.

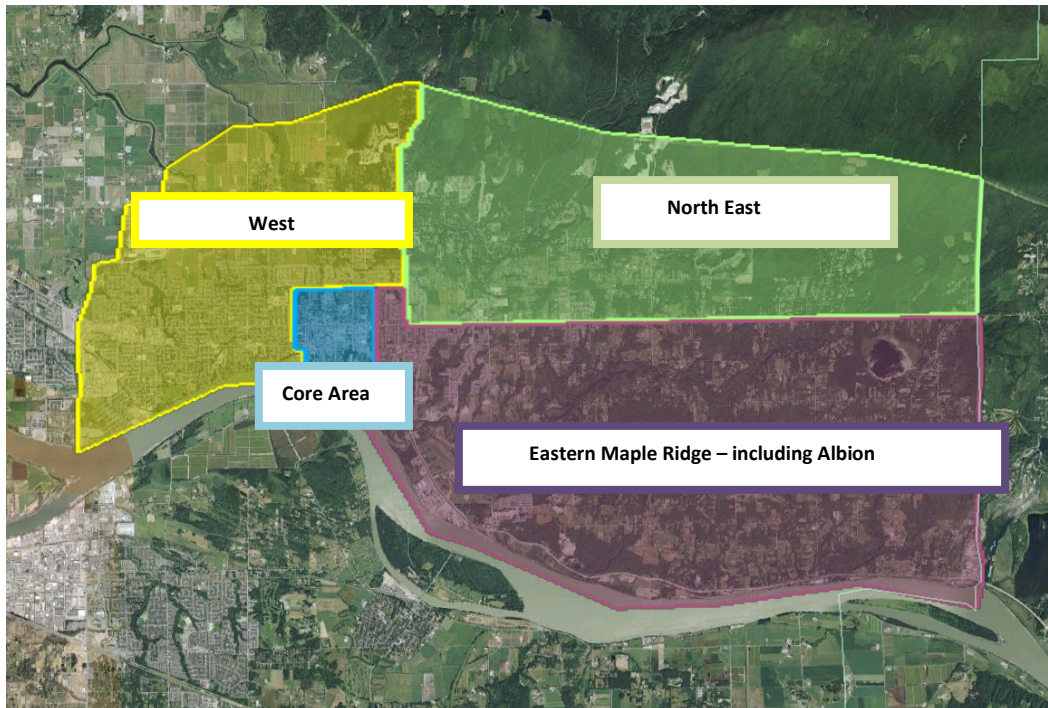
**Figure 8: Historical Housing Values in Maple Ridge**



Since 2005, values for detached and attached homes have increased by 34%, while the value of apartments has increased by 48%.

Currently, the majority of the housing units in Maple Ridge are found on the west side of the District, based on sub-regions delineated in Figure 10 below.

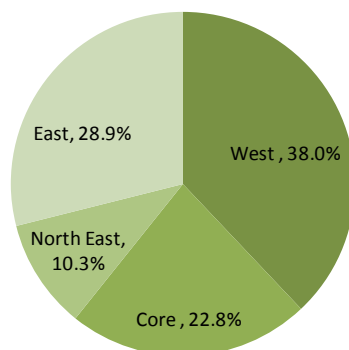
**Figure 9: Maple Ridge Sub-Regions**



In 2010 the distribution of dwelling units by region across Maple Ridge was as follows:

**West:** 10,100 dwelling units  
**Core:** 6,050 dwelling units  
**North East:** 2,750 dwelling units  
**East:** 7,700 dwelling units

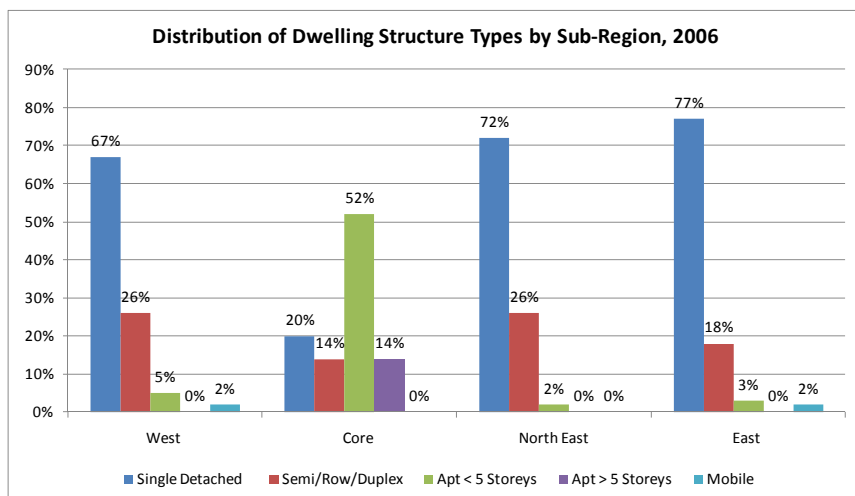
**Total Dwelling Unit Distribution by Sub-Region, Maple Ridge**



The northeast sub-region includes Silver Valley, which is considered one of the new residential growth areas in Maple Ridge.

Looking at structure type by sub-region, it is clear that the Town Core offers housing options not present elsewhere in the district. The Core is the only area with apartment buildings over 5 storeys, and a significant inventory of sub-5-storey apartment dwellings. All the other sub-regions of Maple Ridge have housing type distribution dominated by single family detached dwellings.

**Figure 10: Dwelling Structure Types by Sub-Region**



As Maple Ridge grows and ages, demand for multi-family units in close proximity to amenities and transit will increase.

BC Stats forecasts a long-term decline in household size for Maple Ridge, which can be caused by smaller families, and more multi-family dwelling units.

**Table 15: Household Size and Dwelling Unit Forecast**

Maple Ridge Household Size and Dwelling Unit Forecast			
	Population	Hhld Size	Dwelling Unit Forecast
2010	76,650	2.88	26,600
2021	93,000	2.63	35,300
2026	101,700	2.62	38,800
2031	109,600	2.61	41,900
2036	116,300	2.59	44,800
Change, 2010-2036	39,650	-0.29	18,200
Source: BC Stats, District of Maple Ridge			

As the above table describes there will be demand for 18,200 new dwelling units between 2010 and 2036.

Based on these growth forecasts, Maple Ridge would require 700 housing units per year. According to the CMHC, housing starts in Maple Ridge over the past 10 years (1999 – 2009) have averaged 522 per year.

The increase in unit requirements over historical housing starts is a function of both decreasing household size and the trend of Maple Ridge gaining a growing share of the region's population growth.

## 8.2 MAPLE RIDGE GROWTH STRATEGY

Since 2004, the District of Maple Ridge has taken a number of steps to increase its housing capacity within urban areas in order to accommodate projected future growth. This was culminated in the 2006 OCP, in which objectives and policies were put in place to increase allowable densities in all areas (particularly the Town Centre), provide flexibility in area plans to allow for changing market demands, allow for densification of major corridors and some neighbourhoods, and adopt a District Growth Strategy.

Three areas in particular have been targeted for growth:

- Silver Valley: Expected to have built-out population of 11,000
- Albion: Albion Growth Plan projects a built out population of 9,175
- Town Centre: Forecasted in the Area Plan to have a population of 21,750 by 2021

In addition to the above, the OCP identifies Thornhill as an urban reserve, within the urban area boundary. With Silver Valley, Albion, Town Centre, infill, and the reserve Maple Ridge has ample designated residential lands within its designated urban area boundary.

Significant residential development in the Albion Flats will likely delay growth in other planned growth areas such as the Town Centre and Thornhill, the urban reserve.

## 8.3 RESIDENTIAL POTENTIAL AT THE ALBION FLATS

What demand potential is there for residential development at the Albion Flats? While consideration of residential uses at the Flats goes against the policies of key approval agencies such as the ALC and Metro Vancouver, and currently runs counter to the District's Growth Strategy and OCP, the Flats' strategic location along the Lougheed Highway and in close proximity to existing urban residential areas lends some credence to consideration of residential uses on the site.

The total land area potentially available for residential development at the Albion Flats was calculated as follows:

- Total Albion Flats site area: 311 acres
- Albion Flats area remaining after expansion of recreational facilities as per recreation concept plan: 211 acres
- Area remaining after consideration of land requirements for roads, parks, stream setbacks: 127 acres
- Land remaining after areas allocated to commercial and other potential uses: 117 acres

The following sample residential unit mix was created as a means to understand the range of structure types that could be developed and mixed at the Albion Flats.

**Table 16: Residential Unit Mix at Albion Flats**

<b>Sample Residential Unit Mix Calculation</b>			
<b>Unit Type</b>	<b>% Of Developable Land</b>	<b>Units per Acre</b>	<b>Total Units (Rounded)</b>
Small Lots (5,000 sq. ft. lots)	25%	8	230
Regular Lots (7,000 sq. ft. lots)	25%	6	170
Townhouses	35%	20	820
Apartments	15%	40	700
<b>Total Units</b>			<b>1,920</b>

By altering the percentage of multi-family units, the total number of developable residential units at the Albion Flats could rise to 2,500 or fall to 1,500.

Absorption of residential units at the Flats would be dependent on market conditions and forecast population growth. District-level population and dwelling unit forecasts call for 18,200 new residential units over 26 years. If we assume that residential sales at the Albion Flats captured 15-20% of the Maple Ridge housing market, 1,500 to 2,500 dwelling units constructed at the Flats could be absorbed in a period of 9 to 24 years.

#### 8.4 POLICY AND MARKET CONSIDERATIONS

As noted in section 8.3, residential development at the Albion Flats is currently not an approved land-use from the perspective of the District of Maple Ridge, Metro Vancouver and the ALC.

For residential development to be approved on the Albion Flats, amendments would be required to the District OCP, the Regional Context Statement and the Metro Regional Growth Strategy. Furthermore, there are concerns within the District around developing a significant number of new residential units within the Fraser River Floodplain.

While the District of Maple Ridge will likely not require additional lands to accommodate population growth due to current OCP designations and densification policies incorporated within the 2006 OCP, from a market perspective the Albion Flats present a relatively attractive development proposition:

- A mix of residential structure types (low-rise, town homes, small lot single family) and tenures (rent & own) within a planned community would likely sell well at the Albion Flats given proximity to recreational amenities and relatively short driving distance to the Town Centre.
- Residential would be attractive with the inclusion of neighbourhood-serving commercial uses.
- The potential returns associated with residential development would allow a developer to incur the significant up-front costs associated with necessary site fill and servicing extensions. Other uses would likely have significantly lower return potential and higher financial risk profiles.

However, one important issue regarding residential development at the Albion Flats is the current capacity of nearby schools. Reportedly students that live near the Albion Flats are already attending schools in other areas.

## 8.5 COMPLEMENTARY LAND USES

- Agricultural:** Typically residential and agricultural uses do not work well together, and the Maple Ridge Agricultural Plan cites complaints from residents near agricultural lands as a key issue facing the agricultural sector. Buffer zones between residential and agricultural uses are recommended.
- Recreational:** Recreational and residential uses work very well together, as nearby residents would be placed within walking distance of public facilities. Adjacent residents would add traffic to the proposed new indoor multi-purpose facility. During tournaments and the Fair, residents would need to accept increased traffic in their area.
- Industrial:** Industrial and residential uses typically do not work well together, unless the uses are light industrial. There are examples of progressive mixed-use projects combining light-industrial and residential uses, but in most cases a buffer separates the two uses.
- Commercial:** Residential and commercial uses are a natural fit. Mixed-use projects with commercial on the ground floor and residential above are a traditional form of development. Residential uses can also be located beside large or medium-format commercial projects, but would typically require landscaping to the parking area and good pedestrian connections between the retail and residential areas.

## 8.6 STRENGTHS AND WEAKNESSES OF RESIDENTIAL USES AT ALBION FLATS

The table below offers the strengths and weaknesses of residential uses on the Albion Flats based on different criteria:

**Table 17: Strengths & Weaknesses of Residential at Albion Flats**

<b>Residential</b>			
<b>Criteria</b>	<b>Strengths</b>	<b>Weaknesses</b>	<b>Placement</b>
<b>OCP, Neighbourhood Plans</b>	Nothing Significant	Residential is inconsistent with growth policies and would require a significant policy shift. Would slow growth in planned communities including the Town Centre and Thornhill.	Residential could be located anywhere provided approval.
<b>Metro Vancouver: LRSP and Draft RGS</b>	Designated as a 'Special Study Area' by the Draft RGS, which allows for re-designation with only a 50% + 1 vote from the Metro Vancouver Board.	Re-designation of agricultural lands for residential lands is becoming more difficult.	
<b>ALR</b>	If ALR was re-designated for residential use, the ALC could ask for a fee to promote the efficiency of agricultural lands elsewhere or new lands to be designated within the ALR.	Not an approved use of ALR lands.	
<b>Tax Implications</b>	Residential development would bring the high tax revenues for the site.	Growth on Albion Flats would likely have occurred elsewhere in Maple Ridge, limiting the net tax revenue increase for the District.	
<b>Strategic Considerations</b>	Locating residents near recreational facilities will likely increase utilization and health.  Residential and commercial uses could be combined to create a small village with public gathering places.  Places residents near highway corridor.	Located in flood plain. There would be significant front-end fill and servicing costs.  A village type development with a mix of residential and commercial uses would compete with the Town Centre.  Nearby schools operating at capacity.  Locating residential uses near agricultural lands has reportedly caused issues according to the most recent Maple Ridge Agricultural Plan.	
<b>Employment</b>	Creates short-term full-time construction jobs.	Creates limited long-term full-time jobs (property managers, etc.)	Residential could be designed to highlight environmentally sensitive areas, and use greenspace for marketing purposes.
<b>Environmental Protection</b>	Development could include development of new public greenspaces.	Overall, greenspace will be lost.	
<b>Town Centre Implications</b>	Nothing Significant	Density on Albion Flats would likely delay residential density in the Town Centre.	

## 9.0 SUMMARY OF LAND USE STRENGTHS & WEAKNESSES

The purpose of this report has been to provide background information on a variety of land uses and their potential for location at the Albion Flats. This information is intended to help ground the Albion Flats public engagement and visioning process, providing market and policy ‘checks’ against which the visions can be tested.

Perhaps the most fitting summary statement to conclude this report is that the Albion Flats could accommodate a wide range of different land uses or mixes thereof. This report shows the potential for each of these uses on the site. It is now the task of the District planning staff, planning consultants, and all the stakeholders to engage in a process that allows for uses presented here to be debated, analysed and accepted or rejected as being consistent with, or counter to, the best long-term interests of the District and its residents.

### 9.1 CONCLUDING LAND USE REMARKS

#### **Industrial:**

There is long-term demand in Maple Ridge for industrial land base growth in areas with good access to major transportation corridors. Demand for industrial land at the Albion Flats will be influenced if the Pelton Lands are removed from the ALR. The Pelton Lands are in a more desirable location for light industrial and business park developers given their proximity to the Golden Ears and Pitt Meadows Bridges. It is expected the industrial lands currently being marketed in Pitt Meadows will be the first industrial lands in the area to be absorbed, after which developers will become more interested in developing lands in Maple Ridge.

#### **Commercial:**

There is significant potential for commercial growth in the District, and the Albion Flats offer an attractive location for potential users. The extent of demand for commercial at the Albion Flats will be a function of which other projects come to market, when, at what size, and with what tenant mix. These factors were addressed in preceding sections. Under all scenarios analysed, there was still significant potential for new retail at the Flats. Development of commercial at the Flats would require ALC exclusion and amendments to relevant plans at the District and Metro levels. The potential implications of commercial at the Albion Flats for the Town Centre must also be considered.

#### **Agricultural:**

While quantifying future demand for agricultural lands is a difficult, it is clear that agricultural lands throughout the Metro Region require protection and optimal utilization. At the Albion Flats, the soil quality north of 105<sup>th</sup> Avenue is considered to be relatively high quality. However, these same areas suffer from hydrological issues. Improvement of drainage systems are required to maximize potential of these lands.



**Recreational:**

Demand for new recreational facilities is based on forecast population growth. Maple Ridge and Pitt Meadows have coordinated plans for recreational facilities, and have targeted the Albion Flats for additional field space and potentially a new indoor multi-purpose facility. Development of additional recreational uses at the Flats would require ALC approval for non-farm agricultural uses, but would not require full ALR exclusion. There would also not be a requirement for policy amendments at the District or Metro levels.

**Residential:**

Residential development on the Albion Flats would require a significant shift in policy at the District and Metro levels. Exclusion of lands from the ALR for residential development is inconsistent with the current outlook of the ALC, and will likely not be an acceptable proposition for Metro Vancouver. However, the Albion Flats would be an attractive location for residential development from a market perspective, and could provide the financial returns required to justify high up-front fill and servicing costs.

## 9.2 LAND USE STRENGTHS AND WEAKNESSES SUMMARY TABLES

Industrial / Business Park				
Criteria	Strengths	Weaknesses	Placement	Demand
OCP, Neighbourhood Plans	Nothing Significant	Inconsistent with the current OCP policies	Agricultural land north of 105th are reportedly of higher quality.	Maple Ridge lacks contiguous industrial land in convenient locations for users. Industrial land close to Golden Ears or Pitt River Bridges is in highest demand.
Metro Vancouver: LRSP and Draft RGS	Designated as a 'Special Study Area' by the Draft RGS, which allows for re-designation with only a 50% + 1 vote from the Metro Vancouver Board.	Industrial would require an ammendment to the existing Metro Vancouver LRSP as it is inconsistent with the designation of 'Green Zone'.		
ALR	Nothing Significant	Not an approved use of ALR lands. Would require removal of lands from the ALR.		
Tax Implications	Provides good tax revenue, and diversifies the District's tax base.	Nothing Significant		
Strategic Considerations	Agricultural sector in Maple Ridge needs more agri-industrial space. Potential for agricultural / industrial mixed use.	Indusrial lands closer to Golden Ears and Pitt River Bridges (e.g. Pitt Meadows south Harris Road area, Lougheed Highway, potentially Pelton Lands in Maple Ridge) will likley be preferred by potential users.	Requirements for stream setbacks might make the south of the site a better location for industrial development.	Based on two different approaches, it is believed there will be demand for approximately 200 to 300 acres of industrial land in Maple Ridge by 2040. By 2025 it is estimated that demand for industrial land in Maple Ridge will be between approximately 85 to 115 acres.
	Proximity to existing Albion Industrial Area			
	Promotes and enhances MR industrial sectors. Offers significant contiguous industrial land base within close proximity to Golden Ears Bridge.			
Employment	Will provide the highest number of jobs of all land uses.	Nothing Significant	Best location for industrial development will depend on location of environmental constraints.	Demand was calculated based on historical industrial growth rates and employment forecasts.
Environmental Protection	Could allow for retention of some agriculturally or environmentally significant lands. Could provide a base for agri-industrial uses.	Could lead to removal of significant productive farmland from the agricultural land base.		
Town Centre Implications	More employment in Maple Ridge would increase the need for services, most of which are located in the Town Centre.	An Industrial / Business Park might draw office tenants from Town Centre, or preclude future office space from locating in the Town Centre.		

RETAIL USES AT ALBION FLATS				
Criteria	Strengths	Weaknesses	Placement	Demand
<b>OCP, Neighbourhood Plans</b>	Nothing significant	Inconsistent with the current OCP policies	Retail uses in the small node at the south-east corner of the Albion Flats would not require removal of land from ALR	The potential for retail on Albion Flats will vary depending on competitive developments that are being discussed on the Kwantlen Lands and in Pitt Meadows. Three different scenarios were considered based on whether these two projects go ahead.
<b>Metro Vancouver: LRSP and Draft RGS</b>	Designated as a 'Special Study Area' by the Draft RGS, which allows for re-designation with only a 50% + 1 vote from the Metro Vancouver Board.	Inconsistent with Metro Vancouver designation of Albion Flats (green zone, agricultural).		
<b>ALR</b>	Nothing significant	Not an approved use of ALR lands. Would require removal of lands from the ALR.		
<b>Tax Implications</b>	Provides new source of business tax revenue for the District.	Nothing significant		
<b>Strategic Considerations</b>	Major retailers look for highway locations due to visibility and ease of access/egress. Albion Flats provide both. Also, Albion Flats is 10-15 minutes by car from major population concentration in West MR. Would also help to serve historically underserved east MR.	The site would require significant fill given its location within the floodplain, as well as servicing extensions prior to construction.	Location along the Lougheed Highway would provide good visibility and access. Any configuration of retail would work at the Flats, from small neighbourhood-serving node to large community-serving shopping centre.	<b>Scenario 1: 300,000 sq. ft. of retail is developed on the Kwantlen Lands.</b>  Between 140,000 and 190,000 sq. ft. would be warranted by 2015 and between 300,000 and 425,000 by 2025.
<b>Employment</b>	Will provide some short-term employment during planning and construction, and long-term service sector jobs.	Provides fewer full-time and high paying employment opportunities than would industrial or business park uses.		<b>Scenario 2: 300,000+ sq. ft. on Kwantlen Lands &amp; 400,000 sq. ft. in Pitt Meadows:</b> Between 85,000 and 112,000 sq. ft. by 2015 and between 170,000 and 237,000 by 2025.
<b>Environmental Protection</b>	Removal of lands from ALR for shopping centre construction could be done as part of a trade-off leading to higher quality lands elsewhere being placed within the ALR, or other lands being upgraded for greater agricultural production potential.	Could require removal of high quality agricultural lands north of 105th Avenue from farm use.	Placement of retail uses in areas south of 105th Avenue could allow for areas of higher agricultural potential north of 105th to be preserved.	<b>Scenario 3a: Only Albion Flats are developed:</b> By 2015 between 226,000 and 264,000 sq. ft. would be warranted, and between 430,000 to 524,000 sq. ft. by 2025.
<b>Town Centre Implications</b>	Nothing significant	Pre-empts retailers from possibly considering the Town Centre. Could attract shoppers and businesses from the Town Centre.		<b>Scenario 3b: Only Albion Flats are developed and project captures 5% of market share from existing retail:</b> By 2015 between 340,000 and 380,000 sq. ft. would be warranted, and between 586,000 to 667,000 sq. ft. by 2025.

Agricultural				
Criteria	Strengths	Weaknesses	Placement	Demand
<b>OCP, Neighbourhood Plans</b>	The OCP respects the Regional designation of the Albion Flats as a Green Zone.	N/a	Most of the Albion Flats are within the ALR, but the ALC suggested the soils north of 105th are best suited to agriculture.	Demand for agricultural land is difficult to quantify, but retaining agricultural capacity is a strategic goal for the Metro Vancouver Region, and also for the District of Maple Ridge, as stated in its 2009 Agricultural Plan.
<b>Metro Vancouver: LRSP and Draft RGS</b>	Agriculture use on the Albion Flats is consistent with the LRSP and the Draft RGS.	The Draft RGS will allow re-designation with only a 50% + 1 vote from the Metro Vancouver Board with no public hearing.		
<b>ALR</b>	Most of the site is within the ALR and the ALC considers the soils good agricultural potential.	Urban encroachment can reportedly cause issues with agricultural users.		
<b>Tax Implications</b>	Nothing significant	Low tax base for District.		
<b>Strategic Considerations</b>	<p>Consistent with District Agricultural Plan's calls for preservation of agricultural land base.</p> <p>ALC suggested the lands north of 105th Avenue have the best soils on the Albion Flats for agriculture.</p> <p>Agricultural uses are well suited to land situated within the Fraser River floodplain.</p> <p>Regional goals call for protecting agricultural lands.</p>	<p>Agricultural lands would ideally need to be consolidated. Efficient agricultural use is more difficult on smaller lots.</p> <p>Speculation on the land has driven up the value of agricultural lands.</p> <p>Current drainage issues at Albion Flats must be resolved to capitalize on soil potential</p>		The 2006 Federal Census of Agriculture measured the value of farm receipts from Maple Ridge agricultural lands at \$34.5 million in 2006, down approximately 12% from 2001 when receipts were \$39.2 million.
<b>Employment</b>	Promotes agricultural service sector. Value added agriculture could create additional employment.	Traditional agriculture may not provide significant new diversified job opportunities depending on product.		
<b>Environmental Protection</b>	Preserves greens space. Environmentally sensitive areas can be protected.	Nothing significant		
<b>Town Centre Implications</b>	No negative impact on Town Centre.	Nothing significant		

Recreational				
Criteria	Strengths	Weaknesses	Placement	Demand
<b>OCP, Neighbourhood Plans</b>	Expansion of recreational facilities is promoted by District plans.	Nothing Significant	Recreational uses are planned to be adjacent to existing facilities on lands that currently include some private ownership.	The 2010 Recreation and Culture Master Plan for both Pitt Meadows and Maple Ridge indicates desire to expand the recreational facilities on Albion Flats. Demand for recreational facilities is population based, and based on growth forecasts, Maple Ridge and Pitt Meadows will need new fieldspace and indoor facilities in the near future.
<b>Metro Vancouver: LRSP and Draft RGS</b>	Already was accepted as a 'Non-Farm' use of ALR lands by the ALC.	Nothing Significant		
<b>ALR</b>	Would not require removal of lands from the ALR	Requirement of ALC approval for non-farm uses		
<b>Tax Implications</b>	n/a	Provides little to no tax revenue.		
<b>Strategic Considerations</b>	<p>Builds on existing recreational facilities base already existing at Albion Flats</p> <p>Expanded recreational facilities could provide a regional draw for tournaments, etc.</p> <p>Low density recreational facilities are a suitable use for lands in a floodplain</p> <p>Continues in tradition of recreation and family activity at Albion Flats</p>	<p>Requirements for more surface parking</p> <p>Recreational facilities such as the planned multi-purpose facility make excellent anchors in Town Centres</p> <p>Development of the Ice Palace has reportedly had a negative impact on the water flows on the Albion Flats.</p>		The Albion Flats are considered a good location for expanding recreational facilities for a number of reasons, including the opportunity to create a strong cluster of facilities, easier approval process compared to other non-agricultural uses, and the facilities will service the growing population of eastern Maple Ridge,
<b>Employment</b>	Traffic created by recreation facilities could promote nearby retail and other services.	Will create few direct jobs.		
<b>Environmental Protection</b>	Recreational and cultural uses are less invasive than other uses and would be suitable next to environmentally sensitive areas.	Nothing Significant		
<b>Town Centre Implications</b>	Would help enhance & promote Maple Ridge as family-friendly, healthy, sustainable community	Recreational / public amenities are important uses in the Town Centre, location of a new facility at Albion would preclude its location in the Town Centre.		The expansion plans include adding approximately 40 acres for new facilities including 2 baseball fields and 3 new soccer fields.

Residential				
Criteria	Strengths	Weaknesses	Placement	Demand
OCP, Neighbourhood Plans	Nothing Significant	Residential is inconsistent with growth policies and would require a significant policy shift.  Would slow growth in planned communities including the Town Centre and Thornhill.	Residential could be located anywhere provided approval.	Demand for residential units will be based on forecasted population growth.
Metro Vancouver: LRSP and Draft RGS	Designated as a 'Special Study Area' by the Draft RGS, which allows for re-designation with only a 50% + 1 vote from the Metro Vancouver Board.	Re-designation of agricultural lands for residential lands is becoming more difficult.	Non-ALR lands outside the floodplain are preferable for residential, and include some undeveloped lands on the east of the site.	Forecasts for dwelling units indicate an average annual demand for 700 new units through to 2036.
ALR	If ALR was re-designated for residential use, the ALC could ask for a fee to promote the efficiency of agricultural lands elsewhere or new lands to be designated within the ALR.	Not an approved use of ALR lands.		
Tax Implications	Residential development would bring the high tax revenues for the site.	Growth on Albion Flats would likely have occurred elsewhere in Maple Ridge, limiting the net tax revenue increase for the District.		
Strategic Considerations	Locating residents near recreational facilities will likely increase utilization and health.	Located in flood plain. There would be significant front-end fill and servicing costs.		
	Residential and commercial uses could be combined to create a small village with public gathering places.	A village type development with a mix of residential and commercial uses would compete with the Town Centre.		
	Places residents near highway corridor.	Nearby schools operating at capacity.  Locating residential uses near agricultural lands has reportedly caused issues according to the most recent Maple Ridge Agricultural Plan.		
Employment	Creates short-term full-time construction jobs.	Creates limited long-term full-time jobs (property managers, etc.)	Residential could be designed to highlight environmentally sensitive areas, and use greenspace for marketing purposes.	With a mix of small lot single family homes, townhomes, and apartments it is estimated that Albion Flats could accommodate between 1,500 to 2,500 units.   