1.0 Purpose of Memo

Dillon Consulting Limited (Dillon) and Watson & Associates Economists Ltd. (Watson) prepared Phase 2 of the Employment Lands Study for the City of Burlington (the City) in 2011-2014, the results of which were intended to provide the City with foundational analysis needed to develop a long range employment lands strategy. Dillon subsequently completed an analysis of employment land conversion requests, as well as a number of policy topics in 2016 as part of the City’s Municipal Comprehensive Review efforts.

As some time has passed since the Phase 2 report, the City retained Dillon and Watson to undertake a scoped review of the employment land supply, demand and market analysis to determine whether the key findings and conclusions of the Phase 2 study remain valid. This memo constitutes a scoped review of the conditions relating to employment lands, focused on supply, demand and market trends. The contents of this technical memo are intended to provide additional context on employment lands needs aspects of the City’s Official Plan project.

2.0 Overview of Current Macro-economic Trends

The following section provides a summary of recent macro-economic conditions influencing employment trends within the Greater Toronto Hamilton Area (GTHA), Halton Region and the City of Burlington relative to the Province as a whole.

2.1 Recent Macro-economic Trends in Ontario and Greater Golden Horseshoe

The economic recession hit Ontario relatively hard, with significant declines in manufacturing output particularly in the auto sector and in construction. While the Ontario economy has experienced a rebound in economic activity since the 2008/2009 downturn, this recovery was relatively slow to materialize. That said, provincial GDP levels have sharply rebounded since 2014 and are forecast to remain well above the national average in 2017, as summarized in Figure 1. Stronger provincial economic growth is attributed, in part, to a steady improvement in the economic outlook for the U.S. and an improving export market due to a lower-valued Canadian dollar in recent years.
Manufacturing remains vitally important to the provincial economy with respect to jobs and economic output. As summarized in Figure 2, the manufacturing sector is among Ontario’s largest source of employment. While manufacturing is an important component of the Ontario economy, this sector is not anticipated to generate significant labour-force growth across the Province. In general, globalization has led to increased outsourcing of production processes to overseas manufacturers. While there will continue to be a manufacturing focus in Ontario, industrial processes have become more capital/technology intensive and automated. The highly competitive nature of the manufacturing sector will require production to be increasingly cost effective and value-added oriented, which bodes well for firms that are specialized and capital/technology intensive.
As summarized in Figure 3, the manufacturing sector in Ontario experienced significant declines between 2004 and 2009. Between 2009 and 2012, provincial labour force levels stabilized in the manufacturing sector, followed by a modest decline post-2012. Looking forward, modest labour force growth is anticipated in this sector across the Province, as well as more regionally across the GTHA.

Source: Derived from EMSI Data, 2006-2016 Watson & Associates Economists Ltd.

FIGURE 2: ONTARIO EMPLOYMENT BY SECTOR, 2016
2.2 Existing and Emerging Opportunities by Sector

Figures 4 and 5 illustrates the concentration of Burlington’s goods producing and service providing employment sectors and their respective historical growth rates relative to Ontario, between 2011 and 2016. The relative size of each employment cluster (measured in terms of employment) is also illustrated by the size of the spheres depicted in Figures 4 and 5. The results of this analysis indicate the following:

- Burlington’s economy is comprised of a range of goods producing and service providing industries;
- In terms of goods producing employment, most sectors are concentrated in the City of Burlington at a level similar to the Province as a whole. Collectively, the City’s goods producing sectors have experienced modest growth over the past five years;
- The City has a diverse range of service providing sectors, many of which are well-established, concentrated and rapidly growing; and
- The City of Burlington is also comprised of a number of emerging knowledge-based/creative class employment clusters, including real estate and rental leasing, information and cultural industries as well as arts, entertainment and recreation. These employment clusters have exhibited steady to strong employment growth over the past five years.
FIGURE 4: CITY OF BURLINGTON EMPLOYMENT GOODS PRODUCING EMPLOYMENT CLUSTERS

Source: Data from EMSI derived by Watson & Associates Economists Ltd.
Note: Agriculture, forestry, fishing and hunting have an LQ of 3.98 and Mining, quarrying, and oil and gas extraction have an LQ of 4.68 are not shown in this graph.

FIGURE 5: CITY OF BURLINGTON SERVICE PROVIDING EMPLOYMENT CLUSTERS

Source: Data from EMSI derived by Watson & Associates Economists Ltd.
Note: Agriculture, forestry, fishing and hunting have an LQ of 3.98 and Mining, quarrying, and oil and gas extraction have an LQ of 4.68 are not shown in this graph.
2.3 Importance of Employment Lands in Accommodating Employment Growth

Employment lands form a vital component of the City’s land-use structure and are an integral part of the local economic development potential of Burlington and Halton Region. They are also home to many of the Region’s largest private-sector employers. Employment lands provide opportunities to accommodate a wide-range of businesses and employment sectors, including:

- Traditional industrial sectors, including manufacturing, construction, logistics and distribution facilities requiring large sites with strong 400-series highway connectivity and opportunities for future expansion.
- Business requiring integrated operations on larger sites in a "campus-style" setting. These integrated facilities often accommodate a combination of office, research and development, warehousing and logistics and on-site manufacturing (e.g. Mazda Canada and BMW Canada in Richmond Hill, Honda Headquarters Training Centre and Distribution Centre in Markham and L3 WesCam in Burlington).
- Flex office space, which has become a major trend across the GTHA and beyond. Flex office space allows occupants flexibility in the use and allocation of space according to operation needs. Tenants of flex office space may include businesses that require a blend of office and industrial site characteristics.
- Research and development facilities requiring large 1-storey facilities to operate equipment.

Over the past five years, the vast majority of office development within the City of Burlington has also been accommodated in Employment Areas. In recent years, new office development outside of Burlington’s Employment Areas has been largely comprised of smaller-scale (<500 sq.m./5,000 sq.ft.) professional and medical offices.

2.4 Planning for Office Development in the City of Burlington

Section 5.1.2 (b) of the City’s Official Plan directs Major Office and appropriate major institutional development to Urban Growth Centres (UGC) or major transit station areas, with existing or planned higher order transit services. While the majority of stand-alone office development has been concentrated on the City’s employment lands in recent years, this trend is anticipated to evolve in the coming decades. Looking forward, market demand for stand-alone office space is anticipated to strengthen within mixed-use environments which are transit supportive, pedestrian oriented and offer proximity/access to amenities, entertainment, cultural activities and public spaces.

Based on a review of recent trends within Halton Region and the GTHA as a whole, employment density levels associated with new major office development within the City of Burlington are anticipated to average above 150 employees per net ha. Other remaining new office development not captured as Major Office development is also anticipated to generate relatively high average employment densities. As such, urban land needs associated with office employment growth is anticipated to be minimal.

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1 In accordance with the Growth Plan for the Greater Golden Horseshoe (2017). Major Office is defined as free-standing office buildings, of approximately 4,000 sq.m. (43,000 sq.ft.) of floor space or greater, or with approximately 200 jobs or more.
2.5 Planning for Employment in Burlington’s Mobility Hubs

N. Barry Lyon Consultants in association with Brook McIlroy prepared a report titled, Burlington Mobility Hub Market Analysis and supporting technical memos for the GO Station Mobility Hubs as part of a broader planning initiative by the City to prepare Area Specific Plans for four Mobility Hub areas in the City of Burlington. The Market Analysis Study provides an outlook for the four mobility hubs with respect future population, housing and employment growth to 2031. The subject report notes that new office space is unlikely to be a significant part of growth in the non-residential market to 2031. However, the overall economic base is expected to shift towards a higher proportion of office and service based employment over the long term and given the importance that transit and vehicular accessibility will have for new development, the four Mobility Hub areas are well positioned to absorb a significant amount of the new growth (both residential and non-residential).

3.0 Assessment of Non-residential Growth Trends

The following section provides a summary of recent regional employment growth and non-residential development trends occurring in the City of Burlington’s Employment Areas.

3.1 Historical Employment Growth by Sector – Halton Region

Figures 6 and 7 provide a summary of the estimated 2016 employment base for each of the local municipalities within Halton Region in comparison to the 2011 Halton Region Best Planning Estimates (BPE) forecast for 2016. Key highlights include:

- The City of Burlington and the Town of Halton Hills exceeded the 2016 BPE employment forecast.
- The Town of Milton and the Town of Oakville have fallen well short of the forecast employment for 2016. For the Town of Milton, this shortfall is largely a result of servicing delays within the Derry Green Business Park. For the Town of Oakville, servicing and development approval delays in North Oakville are a key reason for the employment shortfall relative to the 2011 Halton BPE employment estimate for year 2016.
- Estimated 2016 industrial employment levels across each of the local municipalities in Halton Region did not reach the 2016 forecast established in the 2011 Halton BPE, although the gap has been more pronounced in Oakville and Milton.

It is further noted that all municipalities within the Greater Toronto and Hamilton Area (GTHA), except for the City of Toronto, fell short of the 2016 employment estimates set out in the Provincial Growth Plan. This shortfall was largely attributed to lower actual industrial development activity relative to

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what was anticipated between 2011 and 2016. This difference has been further magnified by lower average employment density levels achieved on recently absorbed employment lands in this area.


**FIGURE 6: MUNICIPALITIES IN HALTON REGION, 2016 EMPLOYMENT AND BEST PLANNING FORECASTS FOR 2016**
3.2 Historical Employment Growth by Sector – City of Burlington

Over the 2011 to 2016 period, employment in the City of Burlington grew at annual employment growth rate of 1.7% annually which is slightly lower than the estimated annual employment growth rate of Halton Region at 1.9%.

As summarized in Figure 8, employment growth over the period was driven by a diverse range of sectors, including those in the knowledge-based sectors, retail and industrial sectors. Among the industrial sectors that experienced growth include construction, utilities, wholesale trade as well as administration and support, waste management and remediation services. Employment in manufacturing and transportation and warehousing declined slightly over this period.


FIGURE 7: MUNICIPALITIES IN HALTON REGION, 2016 INDUSTRIAL EMPLOYMENT AND BEST PLANNING FORECASTS FOR 2016
Employment land absorption in the City of Burlington has averaged 8 hectares annually over the 2007 to 2016 period, as summarized in Figure 9. More recently, absorption on employment over the past three years has averaged 11 hectares annually. As summarized in Figure 10, employment lands over this period has primarily accommodated new industrial development.

Land absorption on employment lands is driven by regional/local economic conditions, but is also influenced by the availability of serviced (i.e. shovel-ready) employment land. Major developments over this period are outlined in Figure 11 and include two manufacturing facilities which collectively total 22 hectares, or 64% of the City’s employment lands absorbed over the 2014 to 2017 period. Other developments accommodated on employment lands over this period included, office, medical offices, self-storage, wholesale and logistics facilities and multi-tenant industrial.
FIGURE 9: CITY OF BURLINGTON EMPLOYMENT LAND ABSORPTION, 2007 TO 2016

Historical Average: 8 ha

Source: 2007 to 2014 data from Halton OP Review
2014 to 2016 data from City of Burlington Building Permit Data

FIGURE 10: CITY OF BURLINGTON EMPLOYMENT LAND ABSORPTION BY SECTOR, 2014 TO 2016

Source: City of Burlington Building Permit Data from 2014 to 2016
FIGURE 11: CITY OF BURLINGTON EMPLOYMENT LAND ABSORPTION RATE BY DEVELOPMENT TYPE

Over the past decade, the City of Burlington has experienced steady employment growth and a sizeable share of the employment lands absorption growth in Halton Region:

- Over the 2007 to 2014 period (which comparable data is available), employment land absorption within the City has accounted for 20% of the Region of Halton’s employment land absorption.  
- Over the 2011 to 2016 period, the City of Burlington has accounted for 32% of Halton Region industrial employment growth and 35% of Halton Region total employment growth.  

### 4.0 Employment Land Needs

The GTHA and Halton Region economy is transitioning from goods production to service providing sectors. The trend towards more knowledge-intensive and creative forms of economic activity is evident across many sectors within both the broader national and provincial economies and within Halton Region’s economy. Looking forward over the next 20 years and beyond, employment growth within the City’s Employment Areas will ultimately be driven by demand from a broad range of goods producing, knowledge-based and employment supportive sectors. Reflective of recent development trends and broader employment growth trends in Employment Areas within Halton Region and GTHA, the City’s employment areas are anticipated to be particularly attractive over the long-term towards small to mid-size development (i.e. 1 to 5 ha) in the form of multi-tenant industrial and commercial office space. Provided that serviced employment land supply opportunities are available, larger industrial development (greater than 5 ha) is also anticipated across the City’s Employment Areas within the manufacturing, construction, utilities, and logistics/warehousing sector. Furthermore, the trend towards more knowledge-intensive and creative forms of economic activity is anticipated to drive

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7 Based on background work for the Halton Official Plan Review by Watson & Associates.
demand in employment sectors such as professional, technical and scientific services, information and cultural services, real estate and insurance, health care and social assistance, education as well as arts, entertainment and recreation.

4.1 Employment Land Needs within the City of Burlington to 2031 and 2041

At the Halton Region level, the rate of forecast employment growth on employment lands is anticipated to significantly increase over the next 25 years relative to the past decade. According to the Technical Report to the Growth Plan Amendment No. 2, employment lands employment in Halton Region is forecast to increase by approximately 93,500 jobs over the 2011 to 2041. This represents approximately 44% of the forecast employment growth in Halton Region over the 30-year planning horizon. In order to accommodate forecast employment lands employment growth in Halton Region, each local municipality has a role to play in attracting and accommodating employment lands development across a wide range of traditional and emerging employment sectors.

Our review of recent development trends (i.e. last 10 years) identifies that land absorption levels on the City’s employment lands are tracking slightly above the forecast generated as part of the City of Burlington 2014 Phase 2 Employment Land Study. This suggests that the supply of remaining vacant employment lands within the City may be absorbed at a slightly faster pace than projected in the City of Burlington 2014 Phase 2 Employment Land Study. It is important to note that historic absorption levels could still be understated somewhat, as there remains several areas within the City that require additional planning and infrastructure investment, which once completed, could help to make them more attractive to private sector investment (thereby increasing the pace of absorption).

5.0 Updated Employment Land Supply

5.1 Evolution of the Vacant Employment Land Supply

The Phase 1 Employment Lands study (Phase 1 study) was completed by MKI in 2011 and estimated that the City had a total of 1,378 net hectares of land designated for employment purposes. Of those lands, 78 sites totaling 314.3 net hectares of land were identified as forming the vacant employment land supply. The Phase 2 Employment Lands study (Phase 2 study) was then undertaken by Dillon and Watson in 2011-2014. This study utilized the employment land supply as identified in the Phase 1 study, and updated it based on lands that had been developed since the 2011 study. The Phase 2 study noted that five (5) sites totaling 15.3 net hectares had been developed, resulting in a revised supply of 308.1 net hectares of vacant employment land across 73 sites.

In 2017, City staff reviewed the vacant employment lands to confirm if any sites had been developed since the Phase 2 study, based on building permit data and aerial imagery (performed in August 2017).

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10 As noted above, five parcels totaling 15.3 hectares were developed between the Phase 1 and 2 studies. The actual difference between the total vacant land inventories is 6.2 hectares (314.3 to 308.1) due to some additional refinements to several of the vacant land parcels.
The 2017 review identified 16 sites totaling 34.3 net hectares that had been developed since the Phase 2 study. Without accounting for lands recently identified for conversion to non-employment uses or those subject to current development applications, the total supply of vacant employment lands is 57 sites totaling 273.8 net hectares. The evolution of these changes is described Table 1.

**TABLE 1: EVOLUTION OF THE VACANT EMPLOYMENT LAND SUPPLY**

<table>
<thead>
<tr>
<th></th>
<th>Sites</th>
<th>Total Unadjusted Net Area (ha)</th>
<th>Average Unadjusted Parcel Size, Net Area (ha)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phase 1 Inventory (2010-2011)</td>
<td>78</td>
<td>314.3</td>
<td>4.0</td>
</tr>
<tr>
<td>Sites Developed Since Phase 1 Inventory</td>
<td>5</td>
<td>15.3</td>
<td>3.0</td>
</tr>
<tr>
<td>Phase 2 Inventory (2011-2014)</td>
<td>73</td>
<td>308.1</td>
<td>4.2</td>
</tr>
<tr>
<td>Sites Developed Since Phase 2 Inventory</td>
<td>16</td>
<td>34.3</td>
<td>2.1</td>
</tr>
<tr>
<td>Vacant Sites Designated for Employment Uses (August 2017)</td>
<td>57</td>
<td>273.8</td>
<td>4.8</td>
</tr>
</tbody>
</table>

*Area values may not add up due to rounding*

### 5.2 Sites Recommended for Removal from Current Inventory

The City and Dillon Consulting undertook an Employment Lands Conversion Analysis in 2016 which recommended that up to 133 sites totaling 152.8 hectares of the designated employment land be converted to non-employment uses. The findings and recommendations of the Study are documented in the Burlington Employment Lands Policy Recommendations and Conversion Analysis Report (September, 2016). Some refinements to the recommendations for conversion were made in alignment with the Mobility Hub Study Area boundaries, which were confirmed after the completion of the Employment Lands Conversion Analysis. These refinements did not impact the vacant land inventory.

Notwithstanding the fact that the City intends to redesignate the recommended conversion sites to non-employment uses, most of these sites are subject to the Region’s Municipal Comprehensive Review process, which is forthcoming. At the time of the study, portions of 8 sites totaling 9.5 net hectares were identified as being part of the vacant land inventory and recommended for conversion.

Since the completion of the Study, City staff identified some further modifications to the sites recommended for conversion:

- One additional site totalling 0.8 hectares to be recommended for conversion;
- An expansion of 0.6 ha to the amount of land to be converted for a previously recommended for conversion

The result of the above-noted minor modifications is a total of 9 sites recommended for conversion, totalling 11 hectares.

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11 Input provided by City Staff for the following two parcels (see Figure 12): Vacant parcel number 49 (0.8 hectares); and a modest expansion to vacant parcel number 16 (from 1.14 hectares to 1.75 hectares). The combined area of additional conversions beyond those recommended in September 2016 equals 1.4 hectares.
Once the sites which have been preliminarily recommended for conversion are removed from the vacant land supply inventory, the City will have total supply of 262.9 net hectare spread across 48 sites. **Table 2** depicts the impact of these potential conversions on the vacant land inventory.¹²

**TABLE 2: ADJUSTMENTS FOR SITES RECOMMENDED FOR CONVERSION TO NON-EMPLOYMENT USES**

<table>
<thead>
<tr>
<th>Updates to Vacant Land Supply</th>
<th>Area (ha)</th>
<th>Sites</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017 Vacant Land Inventory</td>
<td>273.8</td>
<td>57</td>
</tr>
<tr>
<td>2016 Sites Recommended for Conversion</td>
<td>9.5</td>
<td>8</td>
</tr>
<tr>
<td>2017 Additional Sites Recommended for Conversion</td>
<td>1.4</td>
<td>1</td>
</tr>
<tr>
<td>Estimated 2017 Vacant Land Inventory, Adjusted for Conversions</td>
<td>262.9</td>
<td>48</td>
</tr>
</tbody>
</table>

*Area values may not add up due to rounding*

### 5.3 Adjustment Factors

The majority of parcels within the vacant land inventory can be considered as “net” lands, such that they represent the net developable area within the limits of a given parcel. Since large parcels would require internal infrastructure to accommodate development (e.g. local roads, stormwater infrastructure, active transportation infrastructure, etc.), an adjustment of 30% has been applied to parcels greater than 10 hectares in net area. Six (6) sites remaining in the vacant inventory are larger than 10 hectares in net area, and these sites have a total area of 151.3 net hectares, of which 45.4 hectares is removed for infrastructure. Once the 30% infrastructure adjustment factor is applied to these sites the total supply of employment lands amounts to 217.5 net hectares.

Furthermore, market constraints may mean that a portion of the land supply may not be available for development over the next 20 years. Accordingly, a structural vacancy factor of 5% has been applied to the vacant employment lands to account for sites that are not intended to be developed within the 20 year planning horizon. A total of 10.9 hectares of land is removed from the overall inventory to account for the structural vacancy adjustment.

Once these adjustment factors are applied, the total effective supply of employment lands is 206.6 net hectares. An outline of these adjustments is provided in **Table 3**.

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¹² As of August 2017 seven (7) sites totaling 18.2 net hectares are currently subject to development applications. The status of those development applications varies and does not necessarily imply that their development will be realized. Accordingly, these sites have been left in the vacancy inventory until such time as they are actually developed.
### TABLE 3: EMPLOYMENT LAND ADJUSTMENT FACTORS

<table>
<thead>
<tr>
<th></th>
<th>Total Net Vacant Area (after removing sites recommended for conversion, ha)</th>
<th>Total Net Area (ha) of sites 1, 5, 6, 7, 17 and 61</th>
<th>Potential land required for infrastructure (30%, ha)</th>
<th>Adjusted Net Area (ha)</th>
<th>Structural vacancy factor of 5% (ha)</th>
<th>Total Effective Net Supply (ha)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vacant Employment Lands</td>
<td>262.9</td>
<td>151.3</td>
<td>45.4</td>
<td>217.5</td>
<td>10.9</td>
<td>206.6</td>
</tr>
</tbody>
</table>

Area values may not add up due to rounding

### 5.4 Current Employment Land Supply

From the 1,378 hectares of land designated for employment uses, after removing those sites which have been recommended for conversion and adjusting for infrastructure and structural vacancy factors, the City has an estimated vacant land supply of 206.6 net hectares of employment land, spread across 48 sites, which is approximately 15%. An outline of the current employment land supply, adjusted for infrastructure and structural vacancy factors and not including sites recommended for conversion to non-employment uses, is provided in Table 4.

### TABLE 4: SUMMARY OF THE VACANT EMPLOYMENT LAND SUPPLY, 2017

<table>
<thead>
<tr>
<th></th>
<th>Sites</th>
<th>Total Unadjusted Net Area (ha)</th>
<th>Total Net Area to remain designated for employment uses (ha)</th>
<th>Total Net Area after industrial adjustment factor (ha)</th>
<th>Total Effective (Adjusted) Net Area (ha)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vacant Employment Lands</td>
<td>48</td>
<td>273.8</td>
<td>262.9</td>
<td>217.5</td>
<td>206.6</td>
</tr>
</tbody>
</table>

Area values may not add up due to rounding

An overview of the properties identified as being vacant is depicted in Figure 12.
6.0 Comparing Supply and Demand

A high level comparison of supply and demand shows that there is sufficient supply of vacant land to accommodate the forecast 20-year demand. The potential range of supply of employment land is based on forecast and historic absorption rates is presented in Table 5.

**TABLE 5: FORECAST YEARS OF EMPLOYMENT LAND SUPPLY**

<table>
<thead>
<tr>
<th>Effective Vacant Employment Lands Supply</th>
<th>Total Net Area (ha)</th>
<th>Years of Supply (based on 7.45ha/year absorption, assumed average from ROPA 38 employment allocation)</th>
<th>Years of Supply (based on 11 ha/year absorption, 3 year historic average)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>206.6</td>
<td>28</td>
<td>19</td>
</tr>
</tbody>
</table>

*Area values may not add up due to rounding*

The analysis is consistent with the Phase 2 study findings, showing that the City’s supply of vacant employment lands would be exhausted sometime before 2044. However, it is important to note that both absorption scenarios probably under estimate the City’s growth potential. The 11 hectare scenario represents the short term historic average and has been achieved with a constrained land supply during the early post-recessionary period. Looking ahead, it is not unreasonable to envision the supply of vacant lands being built out by around 2031, in a scenario where the vacant land supply constraints are removed (i.e. full municipal servicing for the remaining vacant land inventory). These findings emphasize the need for the City to protect and proactively plan its remaining designated vacant employment lands and also provide the basis for planning for employment land intensification over the long term.

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13 Annual absorption since Phase 2 study. Note that the Phase 2 Study also tested a scenario based on 12.5 hectares per year.
### Summary of Employment Lands to Remove

<table>
<thead>
<tr>
<th>Map ID</th>
<th>Conversion ID</th>
<th>Area (ha)</th>
</tr>
</thead>
<tbody>
<tr>
<td>15</td>
<td>25A</td>
<td>1.15</td>
</tr>
<tr>
<td>25</td>
<td>24C</td>
<td>1.30</td>
</tr>
<tr>
<td>26</td>
<td>19</td>
<td>2.02</td>
</tr>
<tr>
<td>49</td>
<td>31</td>
<td>0.80</td>
</tr>
<tr>
<td>61</td>
<td>5</td>
<td>0.13</td>
</tr>
<tr>
<td>62</td>
<td>22B</td>
<td>0.34</td>
</tr>
<tr>
<td>63</td>
<td>4</td>
<td>0.67</td>
</tr>
<tr>
<td>67</td>
<td>16</td>
<td>0.83</td>
</tr>
<tr>
<td>72</td>
<td>40</td>
<td>2.12</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>10.97</strong></td>
</tr>
</tbody>
</table>

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**Legend:**
- **HIGHWAY**
- **MAJOR ROAD**
- **MINOR ROAD**
- **RAILWAY**
- **VACANT EMPLOYMENT LANDS**
- **DEVELOPED PARCELS FROM PHASE 1 INVENTORY**
- **DEVELOPED PARCELS FROM PHASE 2 INVENTORY**
- **EMPLOYMENT LANDS TO REMOVE**
- **URBAN BOUNDARY**

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**Map: Burlington Employment Lands Study**
- **Vacant Employment Lands in the City of Burlington 2017**

**Figure 1**
- **Scale:** 1:40,000
- **Base Data:** Provided by the City of Burlington
- **Map Created by:** Dillon Consulting
- **Map Checked by:** JG
- **Map Projection:** NAD 1983 UTM Zone 17N

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**Data Source:**
- **G:\GIS\163351 Burlington Conversion Lands\GIS Data\MXD\2017-08-15 Update\Burlington_Vacant_Empl_2017.mxd**
- **Project:** 163351
- **Status:** Draft
- **Date:** 1/26/2018

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**City of Burlington**

**Town of Oakville**

**Lake Ontario**
6.0 Recommendations

This Phase 2 scoped review updated the supply, demand and market trends that were identified in the 2014 Phase 2 employment lands study. The update has determined that the key findings and conclusions of the study are still valid. The recommendations, as included in Section 6 of the Phase 2 study are also still valid:

- Recommendation 1: Strengthen the policy framework to fully utilize the employment generation and economic potential of the employment lands
- Recommendation 2: Build a strategy to promote office development in the Mobility Hubs and the Downtown Urban Growth Centre
- Recommendation 3: Leverage existing assets and work closely with BEDC to build a proactive approach to economic development
- Recommendation 4: Implement brownfield redevelopment program
- Recommendation 5: Work with the Region of Halton to track alignment of growth with Best Planning Estimates
- Recommendation 6: Develop a phasing strategy for the City’s unserviced lands
- Recommendation 7: Consider preparing community improvement plans for some employment areas
- Recommendation 8: Consider developing secondary plans for larger greenfield areas
- Recommendation 9: Investigate opportunities for limiting the amount or type of institutional uses on serviced employment lands
- Recommendation 10: Prepare a comprehensive strategy for employment land intensification
- Recommendation 11: Continue dialogue with local utilities