



CRD Industrial Land Use Inventory and Assessment 2009

FINAL REPORT

Prepared by:
CRD Regional Planning Division

December 2009

1. Introduction

In 2008, the CRD Regional Planning Division initiated an Industrial Land Study to examine the supply and demand characteristics of industrial land in the region. This inventory addresses the industrial land supply and demand characteristics. The industrial land inventory will be incorporated into the CRD Land Inventory and Capacity Model being developed to support the Regional Growth Strategy 5 year review.

1.1 Purpose

The purpose of the inventory is to establish a detailed GIS based Industrial Land Inventory that will be used to inform the RGS review, monitor and track changes to the industrial land base and explore the future absorption of industrial land. The resulting database will estimate how much land is currently zoned or designated as industrial, and how much land is currently under use by industry.

1.2 Study Area

The study area consists of the Growth Management Planning Area (GMPA) or the CRD without the Salt Spring Island Electoral Area and Southern Gulf Islands Electoral Area. The growth strategy planning area does not include these two electoral areas as the land use planning for the Gulf Island Electoral Areas falls under the jurisdiction of the Islands Trust.

Subregion	Municipalities
Peninsula	Central Saanich, North Saanich, Sidney
Core	Esquimalt, Oak Bay, Saanich, Victoria, View Royal
West Shore	Colwood, Highlands, Juan de Fuca Electoral Area, Metchosin, Langford, Sooke

1.3 Data Sources

The following data sources were used to develop the Industrial Land Inventory:

- OCP designations
- Zoning Bylaws
- GIS Cadastral
- 2007 Orthophotos
- BC Assessment Authority

To the extent possible, the zoning and OCP information was verified by the municipal planning staff.

1.4 Historical

The last CRD Industrial Land Inventory was completed in 1983. The report noted that there were 1,252 acres of industrial land (including extraction lands) within the region, the majority of which was located within the western communities. The Core municipalities had minimal provision for further industrial land. At that time, there was a regional occupancy rate of 54% for industrial lands (excluding land used for extraction), with a significant amount under development. Approximately 19% or 199 acres were deemed vacant, some due to development constraints.

The 1983 report concluded that there was a 10 year supply of industrially zoned land, enough to last until 1994, assuming that the consumption rate of 15 acres/year calculated over the previous decade would carry forward into the next. The recommendation was also for more large lot (>5 acres) industrial lands, to fulfil the rising demand.

2. Study Approach

The inventory began with a preliminary analysis of the industrial land within the region, followed by a development constraints analysis.

The methodology included:

Supply Analysis

1. Create a database containing all OCP designated and zoned industrial parcels.
2. Translate designations and zoning into common industrial land types.
3. Map known sites: Compile municipal zoning and OCP GIS data – Convert AutoCAD to GIS where necessary.

Vacancy Analysis

1. Determine vacancy through 2007 Orthophotos, Municipal Review and BC Assessment data.

Vacancy: Primarily Greenfield sites zoned or designated as industrial. Industrially zoned land that is cleared but not occupied by vehicles or structures and does not appear to be used. This vacancy definition is adapted from the *2005 Industrial Lands Inventory for Greater Vancouver*.

2. BCAA data will be used to confirm ownership and current occupation of the property.
3. The CRD Employers Database will be used to determine the types of businesses and number of employees at each site.
4. Data confirmation: may require validation (site visits, review by municipal planners and examining information from leasing companies).
5. Report on current Industry Conditions using Industry Reports.

Constraint Analysis

1. Examine environmental, topographical and access constraints to industrial lands.
2. Determine which sites have multiple development constraints.

Demand Analysis

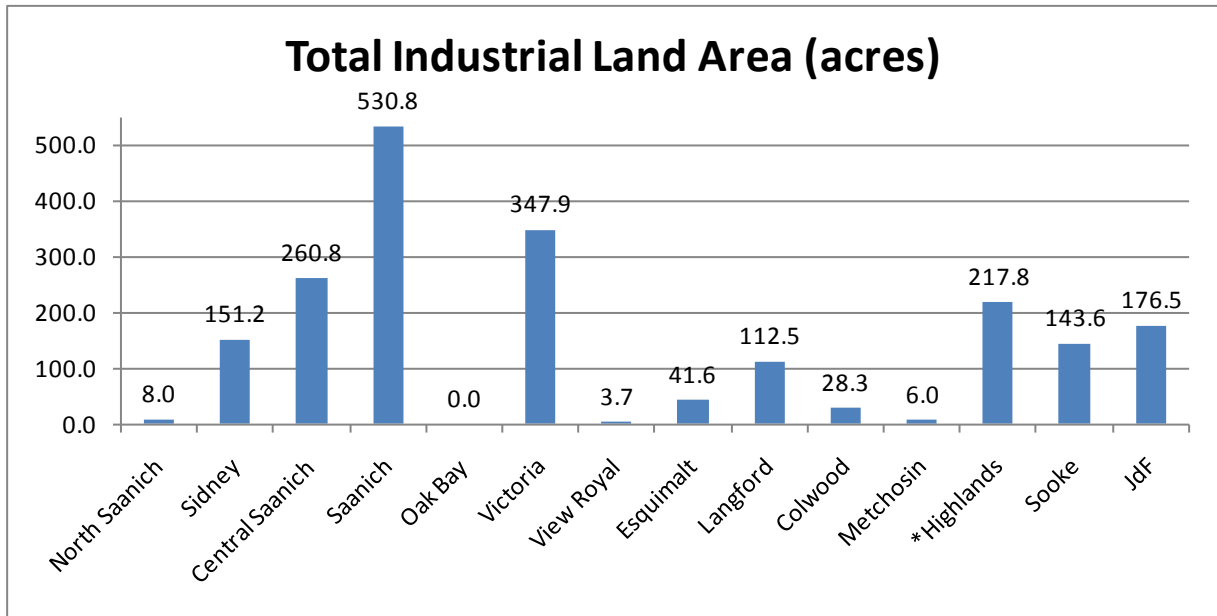
1. Examine trends in industrial land demand.
2. Investigate absorption rates.
3. Track changes over time.
4. Incorporate growth and employment projections from the RGS 5 year review.
5. Undertake a survey/interview with industry experts, major users and municipal staff.

3. Industrial Land Supply

3.1 Supply and Vacancy Analysis

Industrial land availability is a critical factor in economic sustainability. The Victoria market has limited supply, strong absorption rates, low vacancy rates and high land and construction costs. The industrial land supply has been under development pressure from the expanding residential/condo market creating limited capacity for existing businesses to expand and new business to locate within certain parts of the region.

Chart 1:

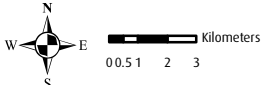


In 2007, there were 2,028.6 acres (821 ha) of industrial land in the Capital Regional District, accounting for 2% of the urbanized land area. Approximately 87% or 1,748 acres (707 ha) was/were developed, including properties that were entirely or partially developed for industrial use. This represents 0.44% of the GMPA land base.

Of the remaining 13% approximately 7% or 161 acres (65 ha), was classified as vacant. For the purpose of this inventory vacancy is defined as: not currently in use for industrial purposes, greenfield sites zoned or designated as industrial, industrially zoned land that is cleared but not occupied by vehicles or structures, and land that does not appear to be used. This definition is adapted from the *2005 Industrial Lands Inventory for Greater Vancouver*.

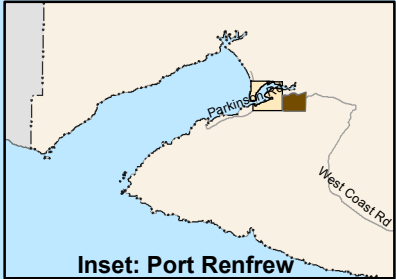
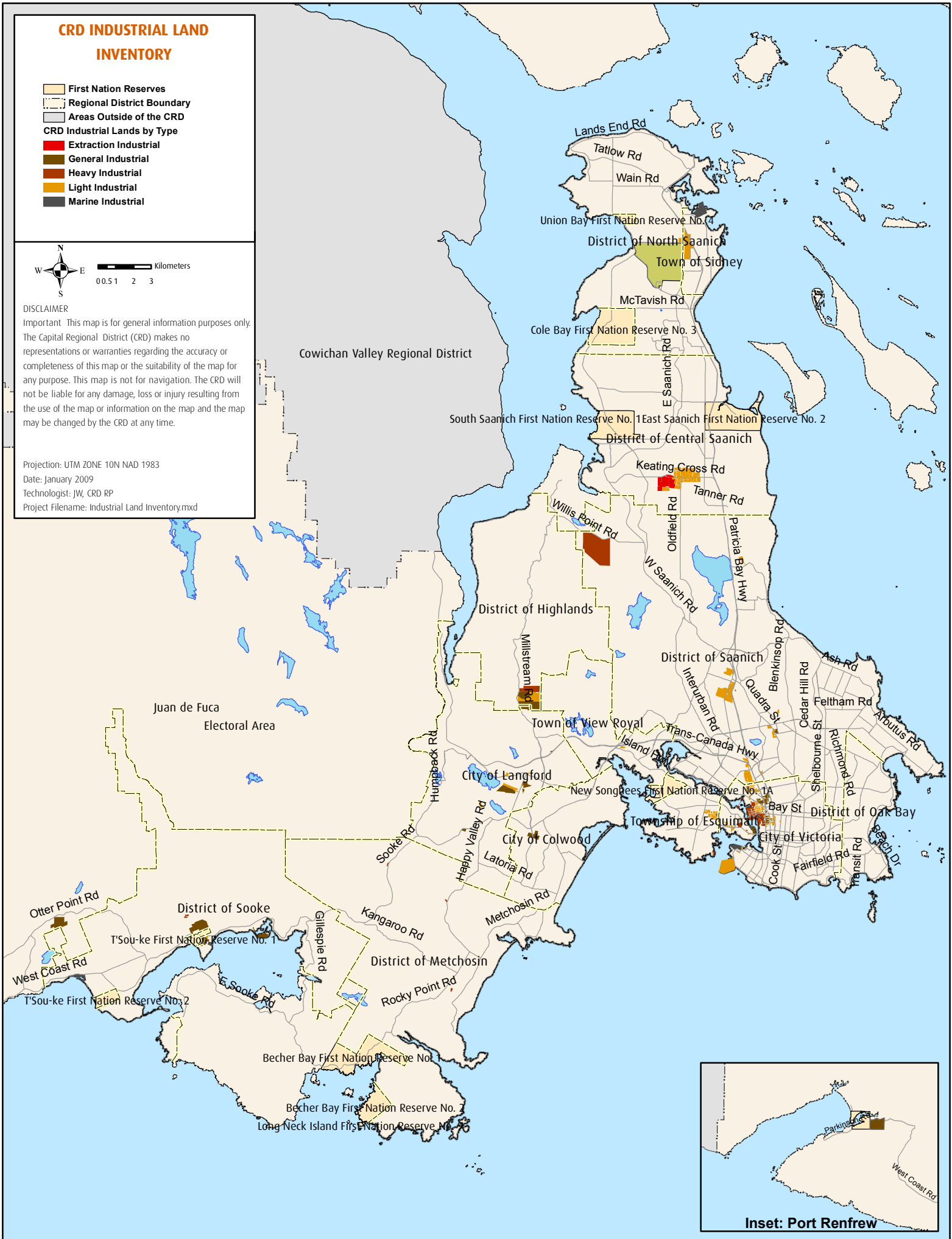
CRD INDUSTRIAL LAND INVENTORY

- First Nation Reserves
- Regional District Boundary
- Areas Outside of the CRD
- CRD Industrial Lands by Type**
- Extraction Industrial
- General Industrial
- Heavy Industrial
- Light Industrial
- Marine Industrial



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 Technologist: JW, CRD RP
 Project Filename: Industrial Land Inventory.mxd



The residual 6% (114 acres) is not known to be developed or vacant as it existed outside of the orthophoto study area (in the Juan de Fuca Electoral Area) and was not clearly defined in BCAA data. Estimates of the vacant land supply are approximate; parcels may have environmental, servicing or development constraints or residential uses. A number of municipal and electoral area industrial zoning bylaws allow for non industrial uses such as a single detached dwelling unit.

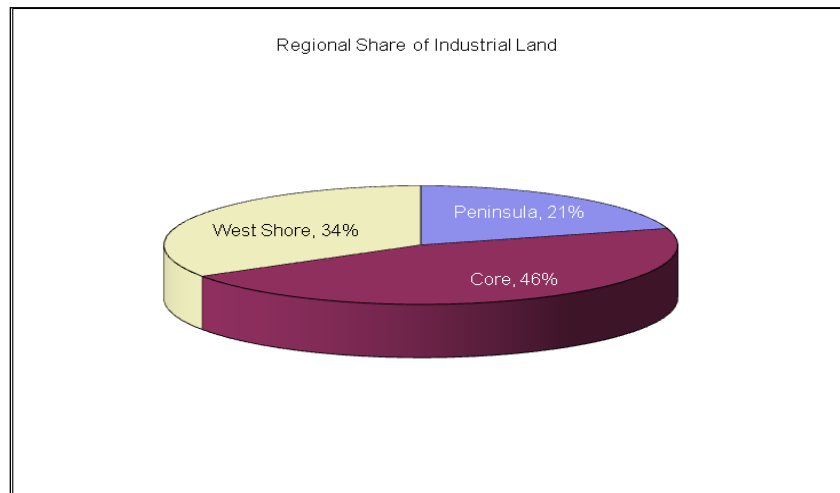
Five common industrial land types account for the industrial land supply in the region:

1. Light
2. General
3. Heavy
4. Extraction
5. Marine

Over 815 acres or 40% of the regional industrial land was zoned or designated for light industrial use, while 28% or 564 acres was used for general industrial use. Heavy industrial land accounts for 23% or 473 acres, while extraction industrial and marine industrial had 91 acres (5%) and 84 acres (4%) respectively.

3.2 Supply Analysis by Subregion

Chart 2:



Core

Over 46% of the industrial land in the region was located within the Core municipalities (Esquimalt, Oak Bay, Saanich, Victoria and View Royal) with only 5.4% of the region's vacant industrial land. The Core municipalities contained 53% or, 433 acres of the region's light industrial land base, mostly in the City of Victoria and District of Saanich. In addition, over 86% of the heavy industrial land supply or 407 acres was divided between Saanich, Esquimalt and the City of Victoria. Of the 565 acres of general industrial land in the region, 65 acres, or 12% was found in the Core subregion.

In the of City of Victoria industrial land holdings are expected to be rezoned and likely removed from the industrial land inventory in the new OCP (2009), View Royal also anticipates potential changes. Once these policy areas have been adopted, the areas will be updated on the tables, charts and maps.

West Shore

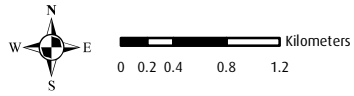
The West Shore (Colwood, Highlands, Juan de Fuca, Langford, Metchosin and Sooke) contained 34% of the regional industrial land (685 acres); with 83% of the region's vacant industrial land. Light industrial land accounted for 12%, or 100 acres, the smallest amount of light industrial land compared to the other subregions. Over 14% (66 acres) of the heavy industrial land existed within the West Shore. The majority of the regions general industrial land was in the West Shore, over 89% or 499 acres. In addition, Sooke possessed over 20% of the marine industrial land, over 22 acres, the only zoned or designated marine industrial land in the West Shore.

Peninsula

The Peninsula (Central Saanich, North Saanich and Sidney) had 21% of the industrial land in the region (420 acres), and 11% of the vacant industrial land. Light industrial land accounted for over 34%, or 282 acres mostly occurring in Sidney and Central Saanich. The region's extraction industrial land supply existed mostly in Central Saanich,(accounting for over 4% of the regional industrial land supply), just over 90 acres. Over 50%, 46 acres, of marine industrial land is located within the Peninsula sub-region; located in and around Sidney.

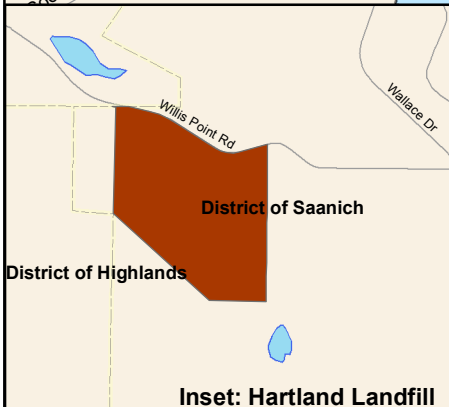
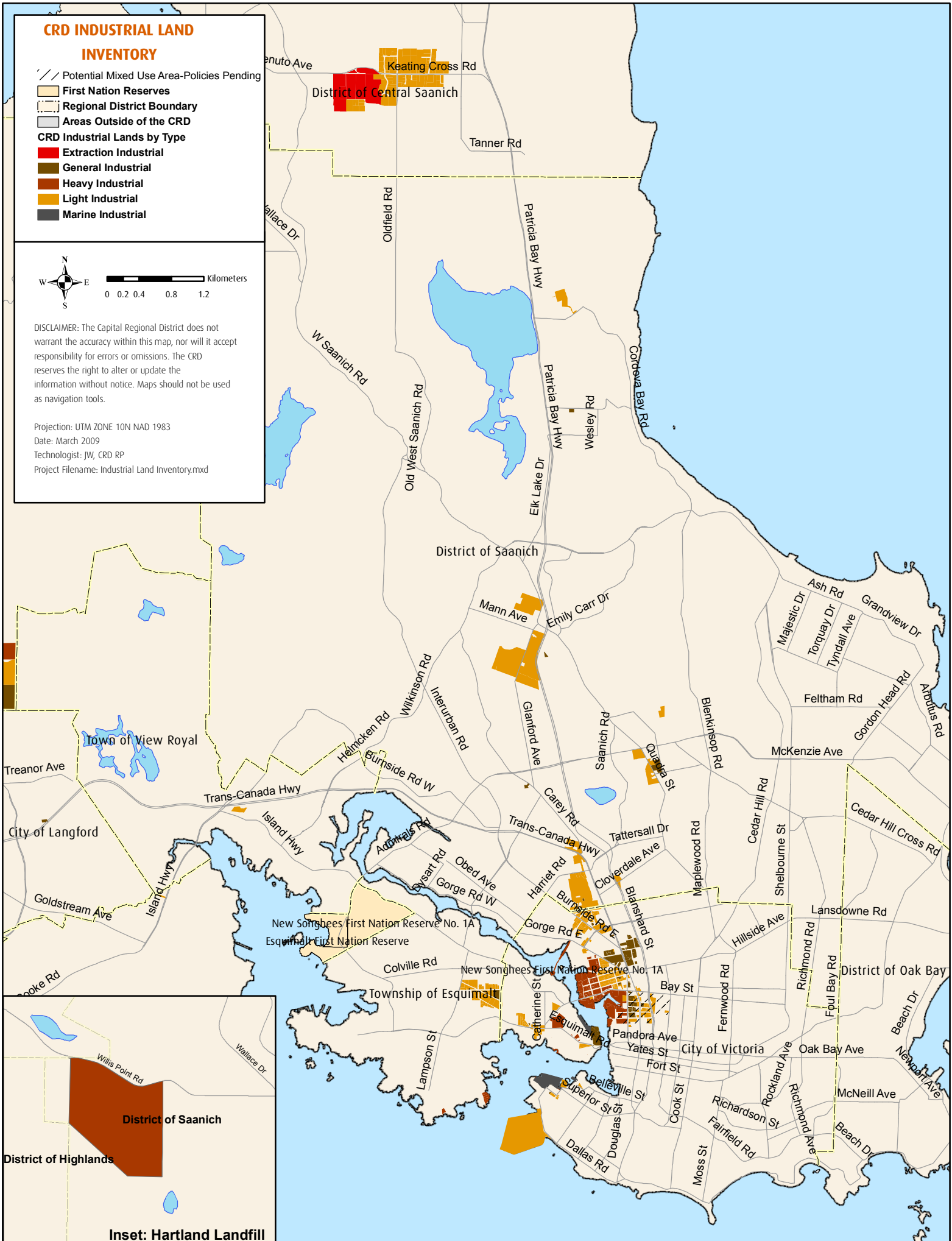
CRD INDUSTRIAL LAND INVENTORY

-  Potential Mixed Use Area-Policies Pending
-  First Nation Reserves
-  Regional District Boundary
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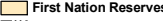
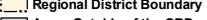
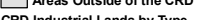
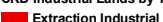


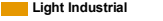
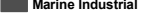


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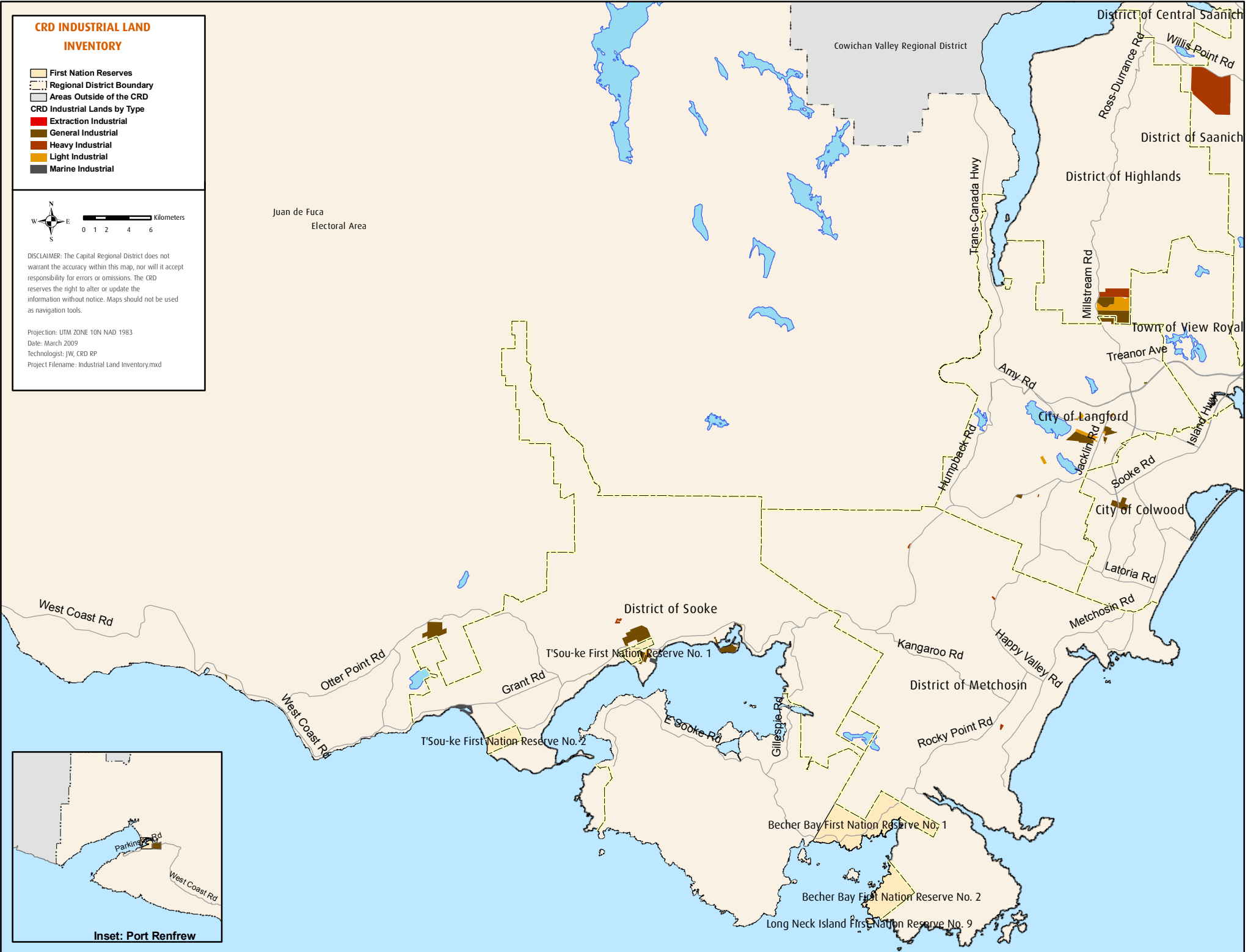
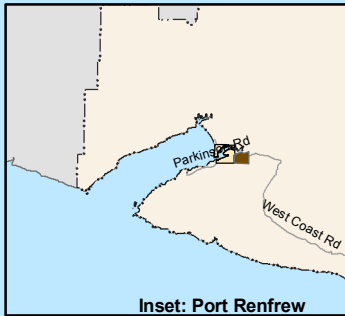
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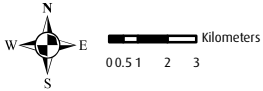
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Juan de Fuca
 Electoral Area



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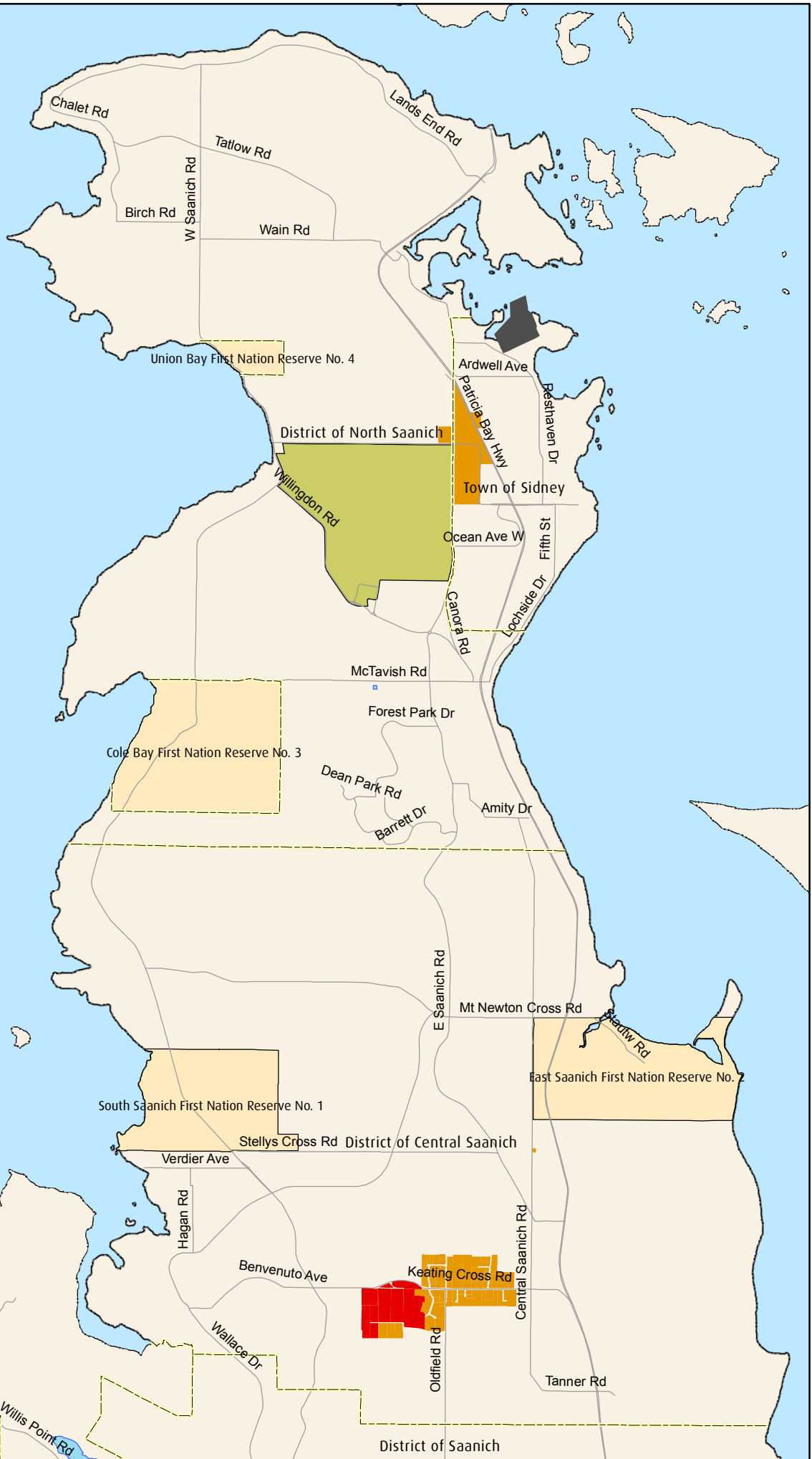


Table 1: Industrial Land Area by Type:

	Total (acres)	Light Industrial (acres)	General Industrial (acres)	Heavy Industrial (acres)	Extraction Industrial (acres)	Marine Industrial (acres)
North Saanich	8.0	8.0	0.0	0.0	0.0	0.0
Sidney	151.2	104.8	0.0	0.0	0.0	46.4
Central Saanich	260.8	169.6	0.0	0.0	91.2	0.0
Peninsula	420.0	282.3	0.0	0.0	91.2	46.4
Saanich	530.8	210.7	9.9	310.2	0.0	0.0
Oak Bay	0.0	0.0	0.0	0.0	0.0	0.0
Victoria	347.9	185.2	51.1	92.1	0.0	19.5
View Royal	3.7	3.7	0.0	0.0	0.0	0.0
Esquimalt	41.6	33.4	4.0	4.2	0.0	0.0
Core	923.9	433.0	64.9	406.5	0.0	19.5
Langford	112.5	29.5	82.4	0.6	0.0	0.0
Colwood	28.4	1.3	27.1	0.0	0.0	0.0
Metchosin	6.0	0.0	0.0	6.0	0.0	0.0
Highlands	217.8	65.1	97.5	55.2	0.0	0.0
Sooke	143.6	4.3	116.0	4.7	0.0	18.6
Juan de Fuca	176.5	0.0	176.5	0.0	0.0	0.0
West Shore	684.7	100.2	499.4	66.5	0.0	18.6
Capital Regional District	2028.5	815.6	564.3	473.0	91.2	84.4

3.3 Constrained Land Analysis

To determine the amount of industrial land affected by potential development constraints or restricted uses a land constraints analysis was undertaken. Land from the supply analysis was overlaid with a series of environmental and topographic constraints which included:

- Riparian Area 30m Setback
- Steep Slopes
- Wetland 30m Setback

The results of this analysis showed minimal impact on the land supply; no one industrial land parcel was fully within the constraints polygons. Approximately 5.5%, or 117 acres of industrial land was considered constrained; these areas occurred where the industrial land supply polygons overlap with the constraints layers indicating potential development limitations on part or the entire industrial parcel.

The riparian setback layer in the Juan de Fuca accounted for the largest constrained area, 60 acres of general industrial land. Steep slopes only affected 1.45 acres or 0.07% of the total industrial area comprised of a single parcel of General Industrial land in the Juan de Fuca.

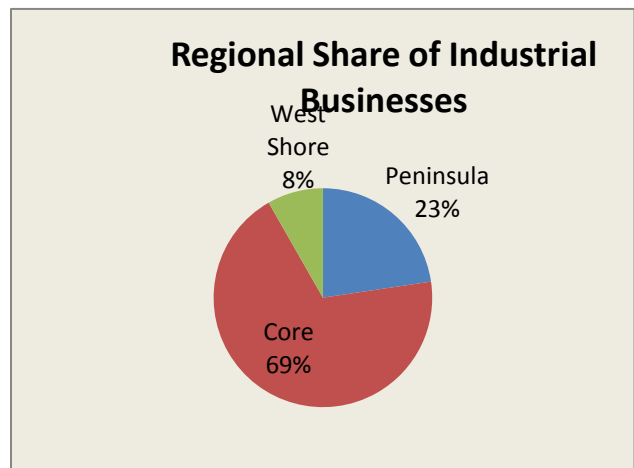
The 30 m wetland setback affected a number of industrial land polygons totalling 55 acres or 2.6% of the light industrial land in the region. These figures reflected a “worst-case” scenario, as not all developments retain the full 30 m setback.

3.4 Industrial Land – Employment

The 2006 CRD Employers database (produced by CRD Regional Planning) was used in conjunction with 2006 Census data to derive industrial employment figures for the inventory. The analysis selected the addresses from of employer’s whose addresses were within the industrial land parcels. This provided the means to display the distribution of businesses visually.

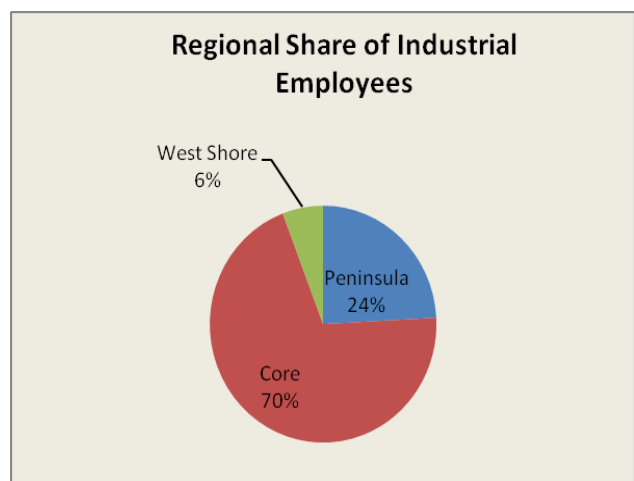
A total of 1,744 industrial businesses existed within the CRD industrial land area, supporting 20,276 employees. The Core had the largest number of businesses; 1,205, representing a 69% share of the regional total. Those businesses supported 14,208 employees, 70% of the total number of regional industrial employees. The majority of these businesses and employees were concentrated in Victoria and Saanich.

Chart 3:



The Peninsula contained the second largest number of industrial businesses at 395, or a 23% share of the total. Nearly 4,900 employees (24%) were supported by the businesses in this sub-region, the majority of which were found in Central Saanich near the Keating Industrial complex.

Chart 4:



In the West Shore 144 industrial businesses (8%) made up the lowest share of businesses in the region, however, these businesses made up 34% or the second largest amount of industrial land compared to the other two sub regions. The industrial employers in the West Shore provided work for 1,175 people, 6% of the total.

The industrial employer’s density map illustrates the distribution of industrial business development across the region. The employers concentrated around the main designated industrial areas such as the downtown industrial lands and the Keating Industrial Park. Both these areas are well serviced by transportation infrastructure and other services.

4. Land Demand and Employment Characteristics

Demand for industrial land in the Greater Victoria area remains high, with little new supply entering the market. The 2009 population and demographic study done by Urban Futures provided a projection of industrial land over the next 30 years. This reflects a very general projection – based on past trends and current absorption rates. According to their study, the Capital region is projected to see 6,351 industrial employees (a 16% increase) come into the market, requiring an additional 343 acres of industrial land over the next 30 years. Industrial employment will experience slower growth compared to other sectors however due to the larger land area per employee ratio, requiring relatively larger amounts of additional land. The subregional distribution of this additional land is based on the current and forecasted industrial land share providing a scenario of how industrial land and employment demand may unfold over the next 3 decades.

Table 2: Projected Industrial Land Demand and Employment Figures by Subregion 2008-2038

Subregion	Additional Land Demand (acres)	Additional Employees
Peninsula	71	1,315
Core	156	2,893
West Shore	116	2,144
GMPA	343	6,351

(Source: Urban Futures 2009 Employment Projections, CRD Regional Planning)

The West Shore has the most vacant land available and therefore will likely see the greatest growth in terms of its share in the regional industrial economy. The majority of the municipalities in the West Shore made OCP commitments to support, promote and develop industrial projects with in their communities. This commitment along vacant land creates a strong opportunity to accommodate the 116 additional industrial acres estimated by the land demand analysis. The additional land is projected to accomodate an estimated 2,140 workers.

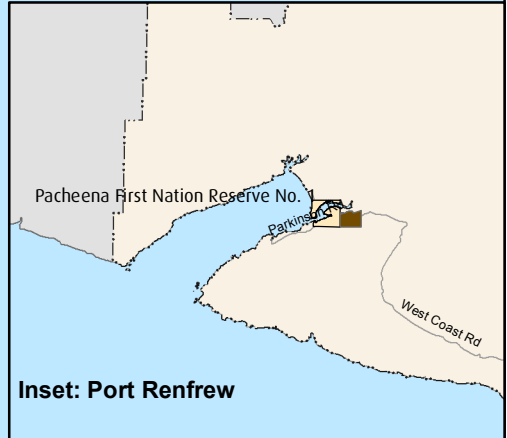
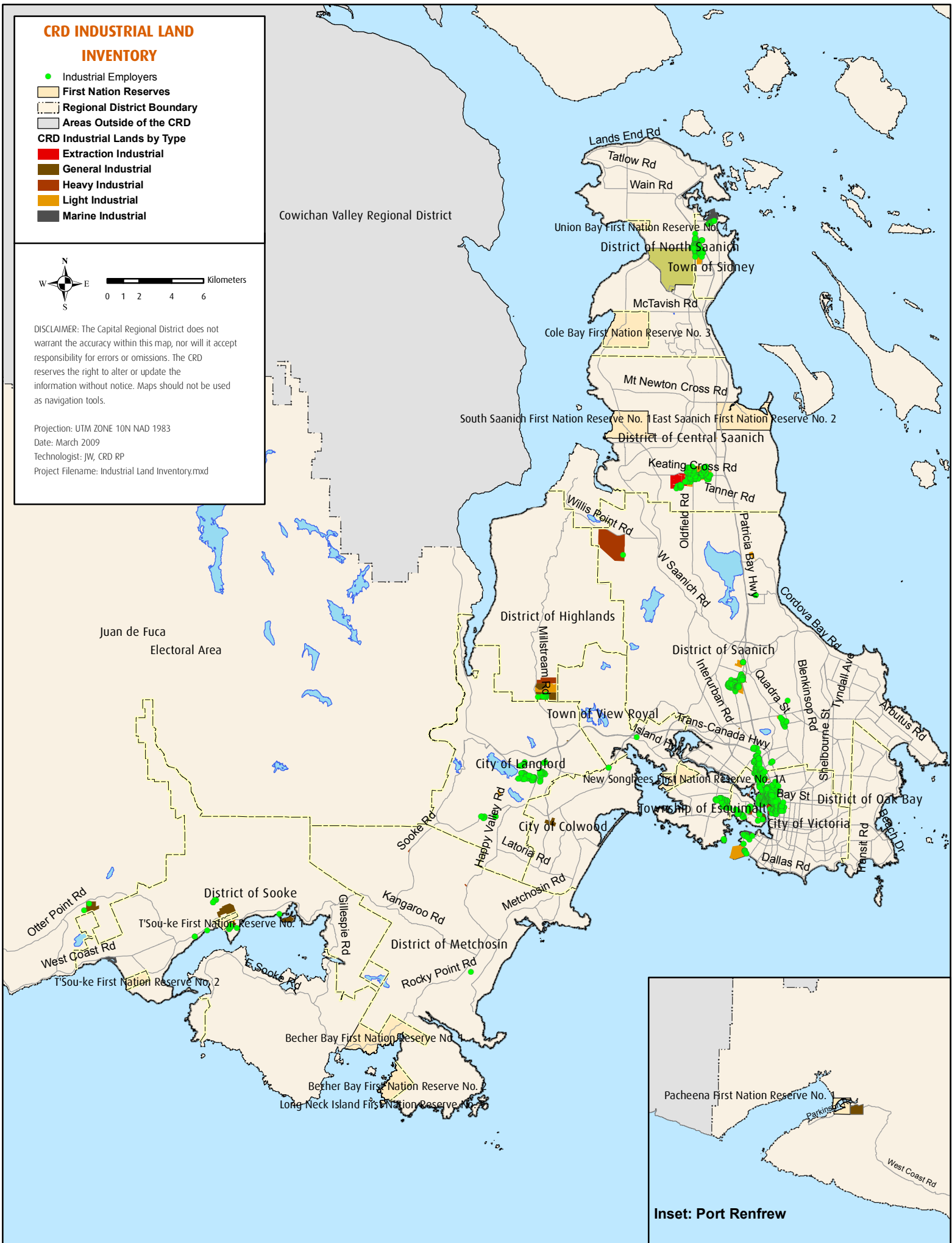
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The projected demand indicates that industrial land close to the Core subregion will continue to be highly sought after. The 30 year land demand for the Core is 156 additional acres requiring approximately more than 2,900 industrial employees. This demand is unlikely to decrease according to Core municipality OCP's which state that they will support, maximize the efficiency of and re-develop existing industrial lands. But have not zoned or designated any additional parcels for industrial uses.

The Peninsula's industrial land demand is roughly 71 additional acres over the next 30 years, the least of all the subregions. These additional acres are expected to employ and estimated 1,300 people. Although the subregional municipalities have committed to supporting and intensifying industrial areas, no additional industrial expansion has been designated; with the exception of the gravel pit conversion in Central Saanich. The Victoria International Airport Authority (VIAA) was also suggested as an area of potential industrial expansion.

5. Land Demand Analysis

This section summarizes the key findings from an industrial land focus group held with a selection of commercial industrial realtors at the Victoria Real Estate Board. The methodology for the land demand analysis was based on the Urban Futures report, the focus of which was primarily population and employment based. The resulting industrial land demand was based on these values. In an effort to capture the qualitative perspective of the future of industrial land in the region the goal of the focus group was to capture this future view through the lens of the commercial industrial realtor and industrial clientele.

The group identified a number of concerns beyond those extracted from the CRD's industrial data. The major issues were:

- Lack of storage and distribution specific warehouse space to support higher populations.
- Minimal alternatives for those businesses that cannot find suitable land in the region
- Quality of existing, available industrial supply is low
- A shift in industrial land perception is needed – a transition has occurred in industrial land to more high tech manufacturing with minimal off-site effects.
- OCP commitments to industrial intensification may not be appropriate.

Demand Characteristics: Industrial land is required to accommodate a number of uses within this region, including warehousing and distribution, technology sector development & manufacturing, storage, and gravel extraction.

The group noted that demand for distribution and warehouse space to accommodate the retail products increases with the population – so demand will continue to increase . A substantial lack of this type of industrial space was noted. Due to the high cost of industrial land in this region large retailers are finding it more economical to truck their products in from other regions as opposed to maintaining a distribution centre in the region. Often the existing storage and distribution spaces are not large enough forcing companies maintain many smaller warehouses. This results in increased storage, transportation and logistical costs.

Retailers have taken a number of alternative approaches to keeping a distribution/storage warehouse in the region; goods are transported in from larger warehouses on the mainland and/or over the Malahat where space is more readily available and affordable. The increased cost of transportation is passed along to the consumer, increasing the price of retail goods.

Demand is such that most new industrial space is built to suit as the older existing stock is unsuitable for most prospective small high tech businesses looking to develop or expand. The high cost to retrofit an industrial building is not easily recovered through increased lease/rental fees because the industrial land market is unable to support higher rents. The constrained supply conditions results in a market with low vacancy and does not attract new business.

Very few industrial uses currently reflect the traditional perception of heavy industrial land use, characterised by noise, odours, environmental contaminants and negative visual impacts. Although the traditional perception of 'industrial' persists, the new form of industrial business entering the CRD market has shifted towards high tech – manufacturing companies that are much cleaner and compatible with surrounding commercial uses. This new type of clean industrial use has not yet been included in most municipal zoning bylaws. Focus group members noted that this generation of land use should not be seen as industrial but rather as alternative employment lands, which attract specialized, well paying job opportunities.

A number of the municipal Official Community Plan's state that the industrial sector will be supported and intensified however, no further additional land will be zoned or designated for

additional industrial uses. Focus group members noted that Industrial intensification would be difficult as most industrial uses require access to a ground level loading and unloading and therefore are not conducive to multiple stories. While it was recognized that the European model of industrial intensification using multi-storey industrial buildings and industrial elevators has been successful; this success was dependent on economies of scale and a comparatively high population to support it. The concern articulated by the group was that this solution may not be possible in the region's market.

First Nations partnerships were discussed as a potential solution to the industrial land shortage in the region. Although a number of Nations have been interested in the clean industrial uses, industrial partnerships have not been developed to date due to infrastructure and servicing constraints.

Due to the CRD's strategic position on the island and relatively small metropolitan area, it continues to be an incubator industry for many small industrial start-up companies. The main result of the regional industrial market conditions is a loss of industrial business and the tax base that comes with it. Increased costs and other barriers to entering the market have pushed a number of prospective businesses to other regions.

6. Development Trends

According to industrial leasing companies, Greater Victoria has experienced a combination of steady absorption and limited supply, keeping vacancy rates low (around 1%). The low vacancy rate results from a shortage of industrial zoned land, rising land values, residential/commercial development pressure, and increased construction costs. As no industrial parks are currently planned, opportunities will remain scarce, keeping industrial real estate highly sought after. Although new supply has entered the market in 2008 with more expected for 2009, the vacancy rate is expected to remain low as the market remains under-supplied.

The vacancy rate for Greater Victoria has experienced 4 consecutive years at less than 1%, remaining below the 5 year average vacancy rate of 1.05%. (Colliers International). While land values and rental rates both doubled between 2003 and 2008.

Absorption rates have remained positive for the past 12 consecutive years highlighted by a record setting year in 2008 according to Colliers, with 336,291 square feet absorbed, exceeding the 5 year average for Greater Victoria of 154,331 square feet. Colliers suggests

that the high rate of absorption in 2008 reflects the increased new supply figures from new development, as new supply is generally leased shortly after coming on the market.

7. Additional Industrial Land Areas (Non-municipal)

7.1 Victoria International Airport Authority (VIAA)

The Airport Authority Industrial Lands are wholly contained within the industrial area of Sidney (VIAA industrial lands were included in regional, sub-regional and municipal totals) according to the submission from the VIAA. The August 2008 *Industrial Knowledge Report* from Colliers International reported that the Airport Authority has expressed an interest in expanding its industrial base with private lease deals; they are currently considering a new lease agreement with Thrifty Foods. Further industrial expansion of airport lands will depend largely on these private sector partnerships.

7.2 Department of National Defence (DND) Lands

DND lands add significantly to the industrial land supply in both Esquimalt and Colwood. However, due to the fact that these lands are exempt from municipal zoning, data is incomplete. Currently, information is being sought from DND, BC Assessment Authority and municipalities to fill this information gap.

7.3 First Nations

Approximately 3,746 acres of First Nations land existed within the region at the time of this study, with an estimated population of 4,800. Some of these lands have existing industrial uses on them and may accommodate future growth depending on the economic development objectives of each community.

8. Summary and Discussion of Industrial Statistics

8.1 Overview

The industrial land statistics for the Capital Region are as follows:

Capital Region:

- 2,029 acres
- 1,744 employers
- 20,276 employees

Peninsula:

- 415 acres (21% of the regional total)
- 395 employers (23% of the regional total)
- 4,893 employees (24% of the regional total)

Core:

- 924 acres (46% of the regional total)
- 1,205 employers (69% of the regional total)
- 14,208 employees (70% of the regional total)

West Shore:

- 685 acres (34% of the regional total)
- 144 employers (8% of the regional total)
- 1,175 employees (6% of the regional total)

GMPA Industrial Land Demand (2008-2038):

- 343 additional acres
- 6,351 additional jobs

8.2 Discussion

Based on the supply and vacancy analysis there is very little vacant land currently available, the majority is located in the West Shore subregion. Of the 2,024 acres of industrial land in the Capital Region, over 90% is developed or currently under use for industrial purposes. The Core municipalities held the most industrial land in the region, nearly half of the regional industrial land supply. The City of Victoria and View Royal are both entering an OCP review in 2009 which could see currently zoned and designated industrial lands rezoned and/or converted in to other uses. These changes could result in a redistribution of industrial businesses to other jurisdictions and regions, reducing the Core's large share of industrial land, employers and employees.

Over 70% (1,510) of industrial employers in the region reside in the Core municipalities. The West Shore contained the majority of vacant industrial land, and comparatively few industrial businesses (8% or 144), positioning the subregion to increase its share of industrial businesses and employees once its vacant lands are market ready. The Peninsula had 21% of the regional industrial land share and 23% of the regional industrial businesses. Almost all of the extraction industrial land supply is located on the Peninsula. Once the resources have

been exhausted the Central Saanich OCP encourages the land to be converted to other industrial uses. This conversion would represent a 55% expansion to the Keating Industrial Park, but may take a number of years to occur. The Victoria International Airport Authority industrial lands also offer some limited additional industrial development opportunities for the Peninsula subregion. Beyond these areas, there is little undeveloped vacant land available on the Peninsula; however, under-developed industrial properties have the potential to accommodate some expansion.

According to projections, the Capital region could see 6,351 new industrial employees requiring 343 acres of new industrial land over the next 30 years. Although the greatest demand is anticipated within the Core subregion it is anticipated that most of the industrial growth will occur in the West Shore municipalities due to the combination of vacant land and support from OCP's. The Peninsula has the least industrial land demand and expects small scale industrial expansion around the gravel pit in Central Saanich and VIAA land.

Appendix A – Definitions & Designations

Definitions and identification of industrial land in the Capital Regional District

The base for the industrial land inventory is land designated for industrial use in Official Community Plans (OCPs), zoning bylaws and BCAA land classifications. Industrial land is defined as land designated in plans and zoning bylaws for manufacturing, heavy or light industrial, research and development, wholesale trade, warehousing, distribution and outdoor storage.

The categories of industrial land used in the regional inventory include:

- Light industrial
- General industrial
- Heavy industrial
- Special Industrial

Light Industrial Land

This designation includes employment-oriented land uses contained within buildings; producing no environmental impacts or nuisance effects. These include clean industry, business industrial and advanced technology uses as well as ancillary and accessory uses. They may include business parks. Light industrial areas often serve as transitional areas between heavier industry and nearby institutional, commercial or agricultural use. To differentiate between commercial and light industrial zones, retail uses are restricted, usually through limits on floor area, parking, hours of sale and/or type of goods sold (e.g. limited to goods manufactured on site – or bulky goods such as building supplies). Examples of light industrial uses include:

- Auto repair, servicing and body shops (not usually sales)
- Limited institutional
- Car wash
- Light manufacturing and processing
- Printing & publishing
- Research establishment
- Warehouse sales
- Warehousing and (indoor) storage
- Wholesaling and wholesale distribution.

General Industrial Land

This designation covers most “conventional” industrial uses and limited accessory and ancillary uses. Land uses may include many of those listed under “Light industrial” but may have more restrictions on retail sales activity and other commercial activity. Requirements for lot coverage, parking, loading facilities and setbacks are usually less restrictive than found in light industrial zones.

Permitted land uses may include:

- Manufacturing
- Processing
- Research
- Storage
- Commercial dry cleaning
- Servicing & repair of goods
- Printing & publishing establishments
- Commercial cleaning facilities
- Utilities & sub-stations
- Communication facilities
- Telecommunication facilities
- Lumber yards, building supply yards; landscaping supplies, etc.

Heavy Industrial Land

Lands designated for heavy industry accommodate uses that may have impacts associated with noise, odour, vibrations and visual impacts. Heavy industrial zones usually accommodate outdoor storage. They are not usually a compatible neighbor with residential. While height restrictions may be less than for light industrial – there are usually very strict conditions placed on retail/commercial uses.

Land uses may include:

- General and heavy construction contractors
- Heavy equipment manufacturing, sales, servicing and storage
- Cargo handling
- Manufacturing, processing and packaging of goods and materials
- Bulk storage

- Waste management facilities and storage
- Recycling plants and facilities

Special Industrial

Some jurisdictions have special industrial zones which are restricted to a certain type of use or location. These may include:

Marine industrial: a specific industrial land use designation to accommodate water-dependant uses such as:

- ship building
- moorage facilities
- marine commercial uses
- aquaculture processing operations
- industrial marine uses
- warehousing and marine-related storage

Airport Industrial: a specific industrial land use designation to accommodate either airplane related uses or industrial uses that can co-exist with airport/noise exposure conditions. The lands included in the inventory are limited to lands zoned for industrial uses and do not include the runways, terminal building and control tower.

DND Industrial: a specific land use designation associated with industrial land use located on Department of National Defence –owned lands. The lands included in the inventory are limited to lands zoned for industrial uses and available to non-DND users.

Industrial – Comprehensive Development Zones: CD zones are designed to accommodate site-specific, unique or innovative land uses or mix of uses that cannot be accommodate within more conventional zones. For the purpose of the industrial land inventory – only CD zones containing a significant portion of industrial use will be included.

Extraction Industrial Land: These are usually sub-sets of heavy industrial limited to large scale resource-based operations. Operations usually involve noise, vibration and dust/air emissions. Land use may include:

- sand and gravel extraction, crushing and washing
- large-scale outdoor storage
- large-scale municipal yard works

- waste management facilities and landfills.