



City of Niagara Falls Employment Land Strategy

Council Presentation
April 20, 2021

Study Purpose



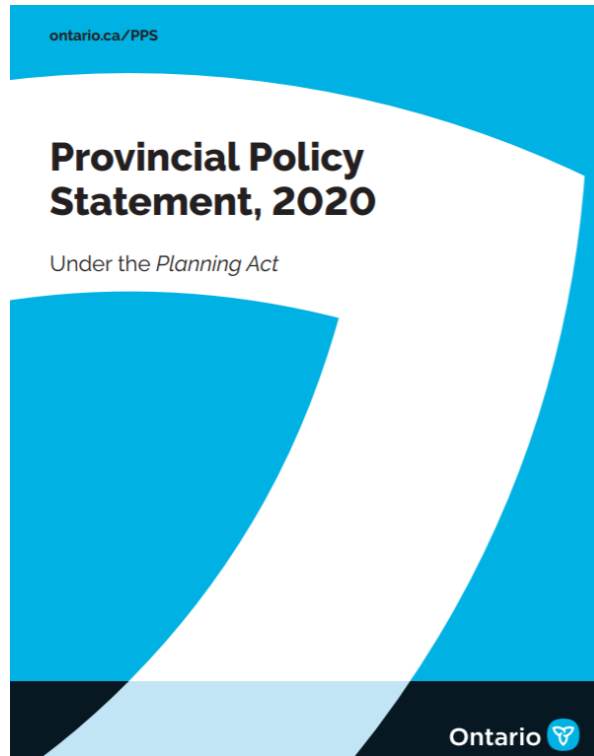
- Watson & Associates Economists Ltd. (Watson), in partnership with Dillon Consulting Ltd. (Dillon), and MDB Insight Inc. (MDB) were retained in the winter of 2020 by the City of Niagara Falls to conduct an Employment Lands Strategy (E.L.S.) for the City.
- This E.L.S. will contribute to a long-term vision and planning policy framework which will enhance the City's competitive position for industrial and office employment, including other employment-supportive uses in its Employment Areas. This study will provide the following outcomes:
 - Long-Term Land Needs Analysis;
 - Public and Stakeholder Engagement; and
 - Policy and Strategic Recommendations.

Purpose of Presentation



- The purpose of this presentation is to provide Council with the findings of our technical analysis as it relates to Phase 1 and 2 of the E.L.S.
- Furthermore, for information purposes, Watson will explore several of the non-residential policy recommendations for the City of Niagara Falls.
- Ask City Council to authorize staff to proceed with an open house/public engagement and finalize the study.
- Upon the completion of Phase 3 of the E.L.S., an additional council presentation will be provided to summarize the final results of the study.

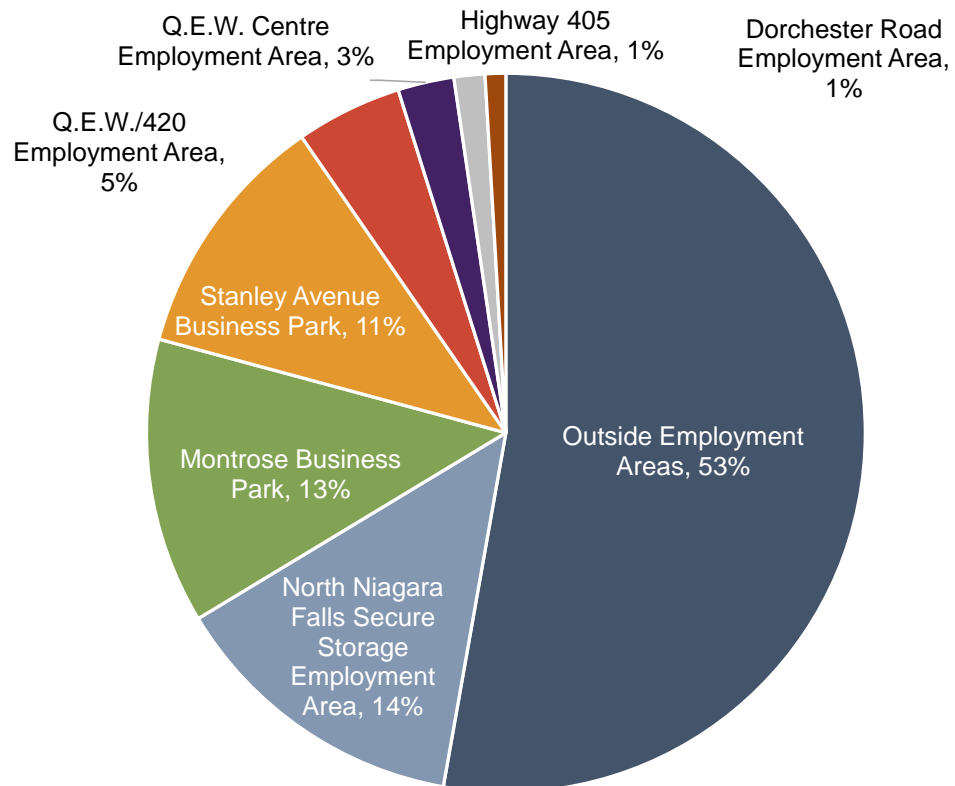
Planning Context



Preliminary Employment Land Supply

Designated Employment Lands by Location

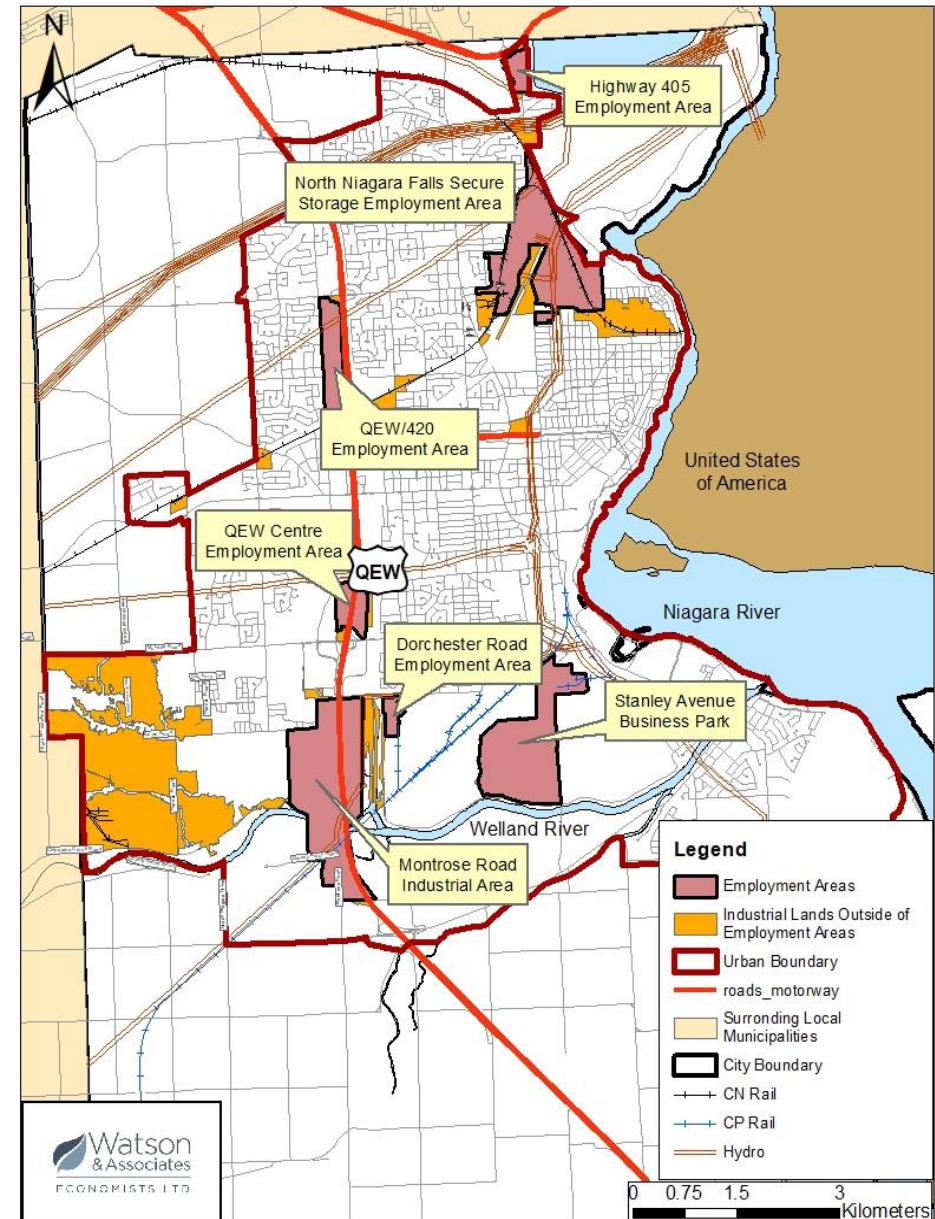
Total: 1,142 gross ha



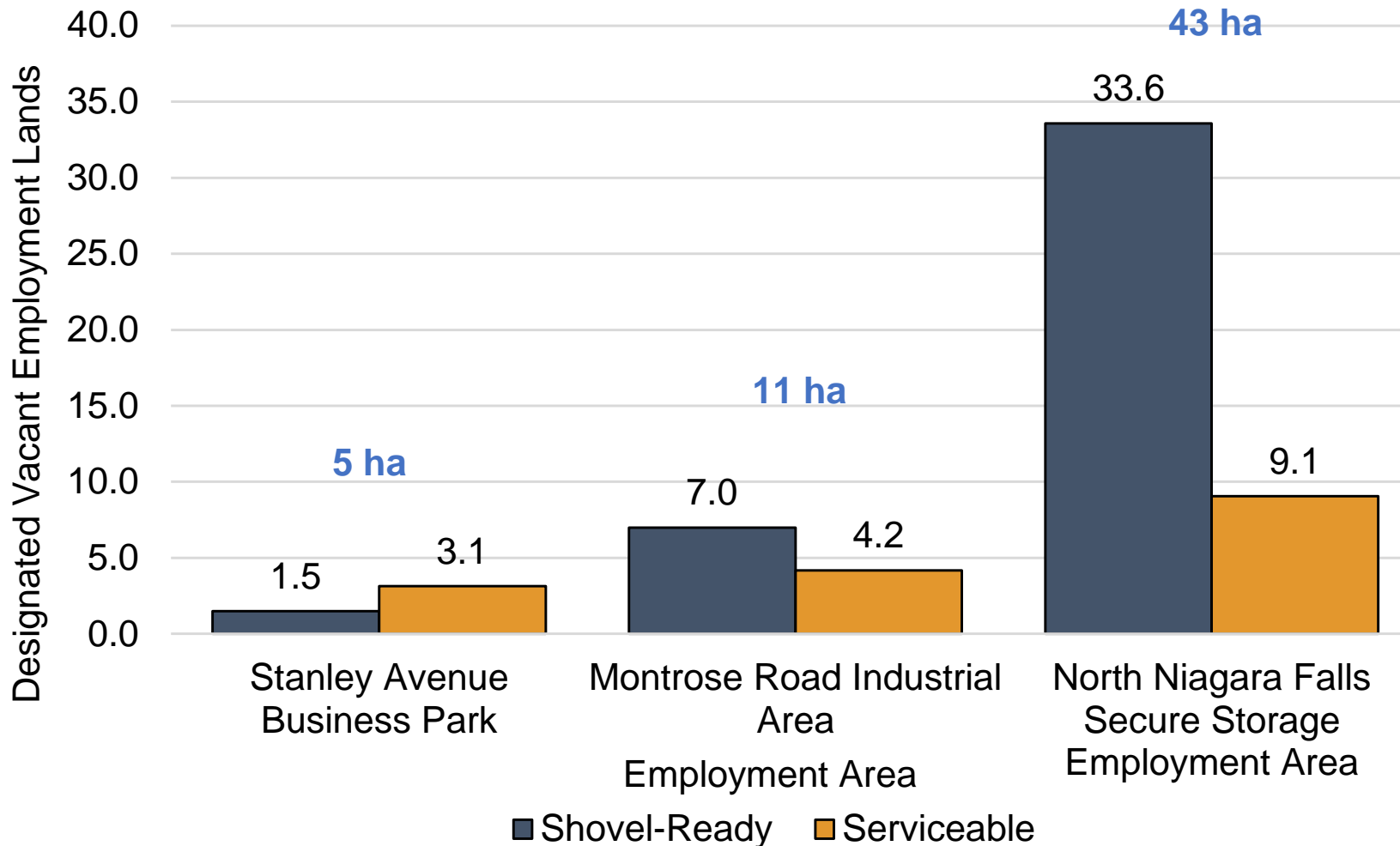
Source: Derived from the City of Niagara Falls G.I.S. data, by Watson & Associates Economists Ltd., 2020.

Note: Based on gross land area with take-outs in accordance with Growth Plan, 2019.

Vacant: 60 gross ha (5%)



Vacant Employment Lands Supply by Employment Area and Shovel-Ready Status



Source: Derived from City of Niagara Falls G.I.S. data by Watson & Associates Economists Ltd., 2020.

City of Niagara Falls Target Employment Sectors

City of Niagara Falls Target Employment Sectors



- Advanced Manufacturing
- Construction
- Research and Development / “Knowledge-Based” Sectors
- Corporate / Government Office
- Professional, Scientific, and Technical Services/Business Services



Employment Area Analysis

North Niagara Falls Secure Storage Employment Area



Youngs Insurance Brokers on Regional Rd 57.

Diverse employment base, with no discernable industry concentration existing.

There have been difficulties promoting vacant employment land absorption historically because of expensive land costs.

112 gross ha developed (72% of Employment Area)

43 ha gross vacant land remaining. Buildout approaching.

34 ha of vacant land are shovel-ready

Minimal supply of underutilized lands (8 gross ha)

Limited demand for parcels. Residential encroachment and parcel fragmentation

City of Niagara Falls Employment Areas



Turkstra Lumber on Kent Ave.
Q.E.W./420 Employment Area



Battlefield Equipment Rentals (left) and
Danceworks (right), on Oakwood Drive.
Q.E.W. Centre Employment Area



Premier Trucking Group on
Oakwood Drive
Montrose Road Industrial Area

Minimal vacant
and
underutilized
lands
remaining.



Highway 405 Employment Area



Palfinger Inc., on Dorchester Road.
Dorchester Road Employment Area

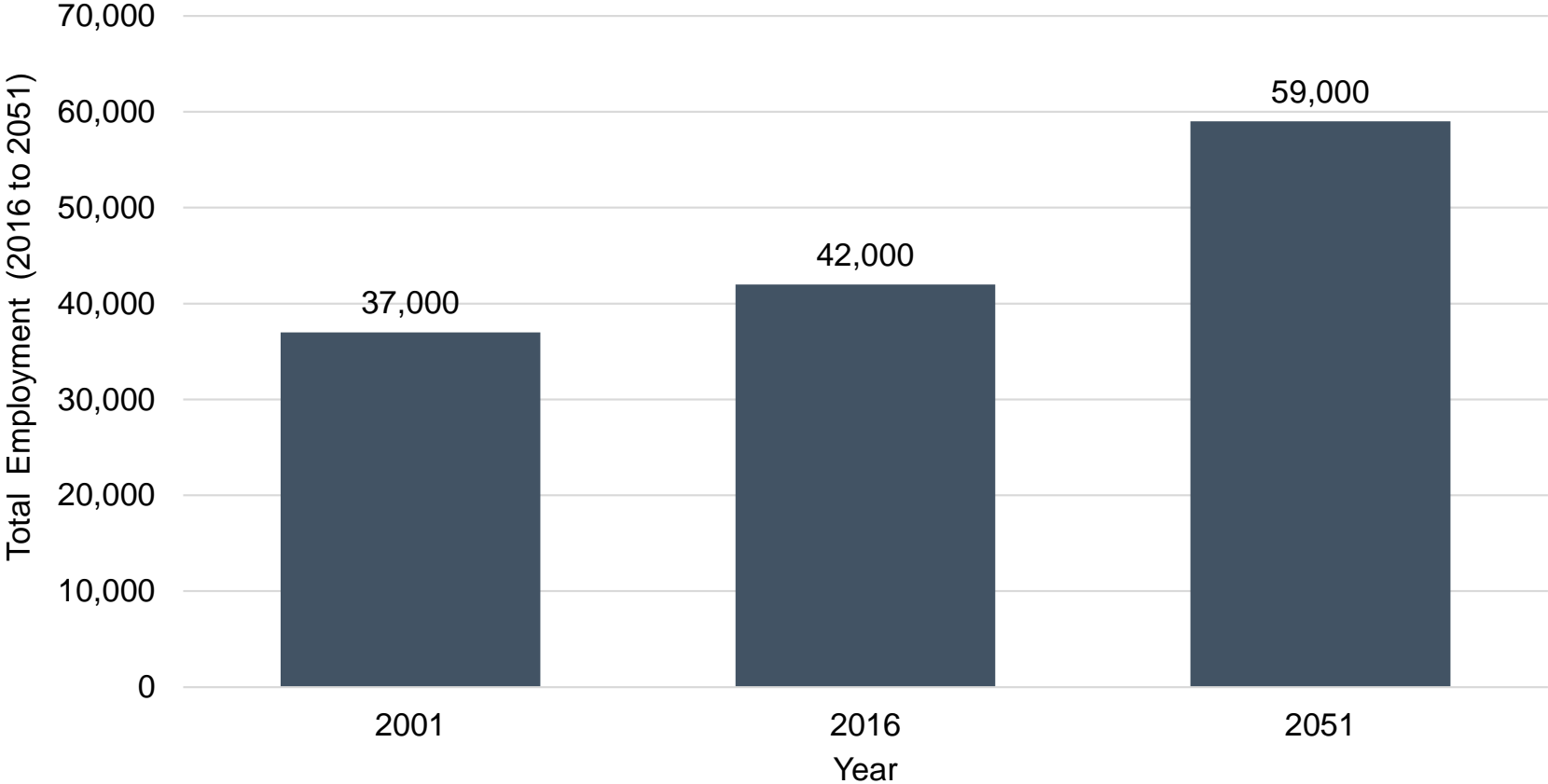


Centennial Concrete Niagara Inc., on
Progress Street
Stanley Avenue Business Park

Future growth
largely limited to
redevelopment
and expansion
opportunities.

Employment Forecast and Employment Area Land Demand to 2051

City of Niagara Falls Employment Forecast, 2016 to 2051



17,000 New
Jobs Expected
Over the 2016
to 2051
Forecast Period

Source: 2001 to 2016 derived from Statistics Canada Census. 2051 by Watson & Associates, derived from A Place to Growth: Growth Plan for the Greater Golden Horseshoe (2020). Figure by Watson & Associates Economists Ltd., 2021.

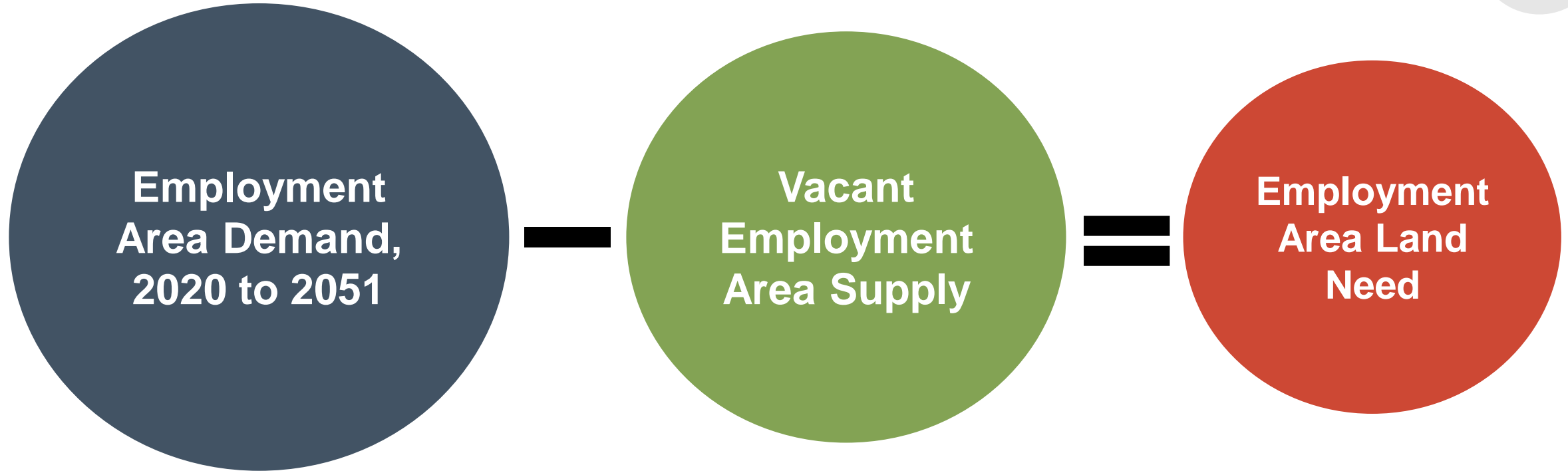
City of Niagara Falls Employment Growth on Employment Areas, 2020 to 2051



Employment Type	City of Niagara Falls Employment Growth by Type	City of Niagara Falls Employment Growth in Employment Areas	% in Employment Areas
	2020-2051	2020-2051	
Major Office	1,310	-	0%
Population Related	12,650	620	5%
Employment Land	2,370	2,370	100%
Rural Area	1,430	-	0%
Total Employment	17,760	2,990	17%

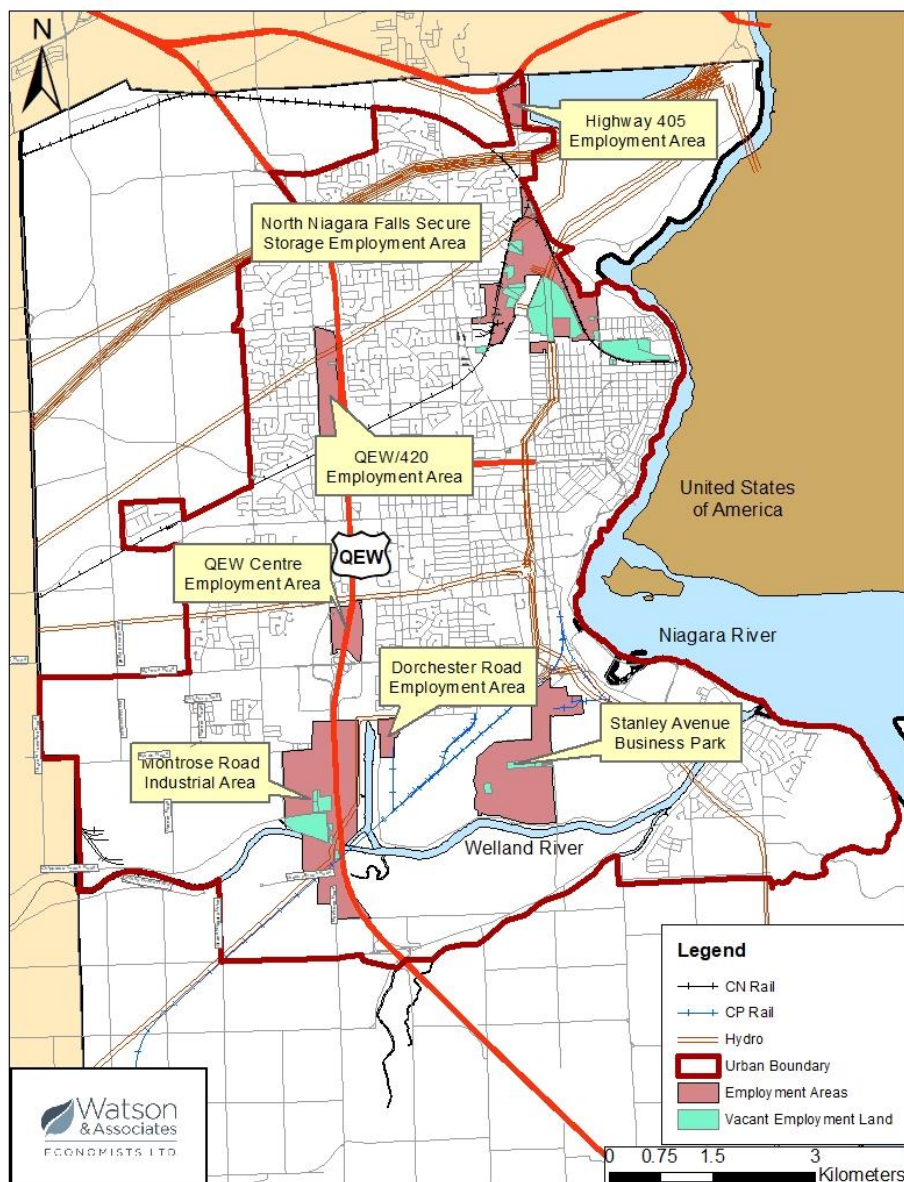
Source: Share of employment in Niagara Falls Employment Areas derived from Niagara Region Municipal Comprehensive Review – Review and Update of MCR Forecast Allocations and Land Needs Assessment Results, September 9, 2019. Total 2020 to 2051 employment growth derived from Golden Greater Horseshoe Technical Report: Growth Forecasts to 2051. Figure by Watson & Associates Economists Ltd., 2020.

City of Niagara Falls Employment Growth on Employment Areas, 2020 to 2051



- Initial technical results indicate the City of Niagara Falls will experience a shortfall of employment land within the next 20 years.
- As a part of it's Official Plan Review, the City should begin exploring lands for a future Employment Area designation to ensure the long-term employment demand forecast can be accommodated.

City of Niagara Falls Vacant Employment Lands



Vacant Employment Land Remaining

North Niagara Falls Secure Storage Area:
43 gross hectares

Montrose Industrial Park:
11 gross hectares

Stanley Avenue Business Park:
5 gross hectares

Policy Recommendations

Policy Recommendations



- Key Themes:
 - **Future vision for the City's Employment Lands**
 - “Employment Lands within the City of Niagara Falls will provide the City with a diverse collection of parcels; opportunities for Greenfield Development and intensification of existing sites; and, allow the City to competitively respond to market demands and meet the City's employment needs to 2051.”
 - **Provincial and Regional Policy Conformity and Alignment;**
 - There are a number of changes to the City's current O.P. framework required to address matters of consistency and conformity with the P.P.S., 2020; Growth Plan, 2019 (including Amendment 1); and the Niagara Region O.P.

Policy Recommendations



- **Key Themes:**
 - **Employment Land Conversion**
 - It is recommended that the O.P. Schedules and any associated policies be updated, as required, to reflect the recommended conversion areas with the appropriate land use designations applied.
 - **Future Land Needs**
 - There will be a need for the City to provide additional land to meet the demand to the 2051 planning horizon. The City will have to start developing employment lands in the short-term to avoid long-term supply issues.
 - **Competitiveness of Supply**
 - Continue to utilize investment-incentives such as the Economic Gateway Program and Municipal Employment Incentive Program.

Conclusions

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- The City should strengthen policies to protect and retain the existing vacant employment land supply to ensure that future demand on employment lands is not unduly constrained by a lack of market choice throughout its remaining vacant parcels and constrained by conflicting land uses.
- The City of Niagara Falls is expected to experience an Employment Area land shortfall before 2051.
- This shortfall, accompanied with the difficulty of marketing the North Niagara Falls Secure Storage Employment Area, will require a new Employment Area to be identified and developed.
 - As a part of it's Official Plan Review, the City should begin exploring lands for a future Employment Area designation to ensure the long-term employment demand forecast can be accommodated.

Next Steps

Phase 3 Next Steps



- City Council to authorize staff to proceed with an open house/public engagement and finalize the study.
- Stakeholder Session/Public Open House – Virtual Environment
- Draft Official Plan Amendments and Zoning By-Law Amendments
- Statutory Public Meeting
- Final Official Plan Amendments and Zoning By-Law Amendments
- Council Meeting to Deliver Phase 3 Results