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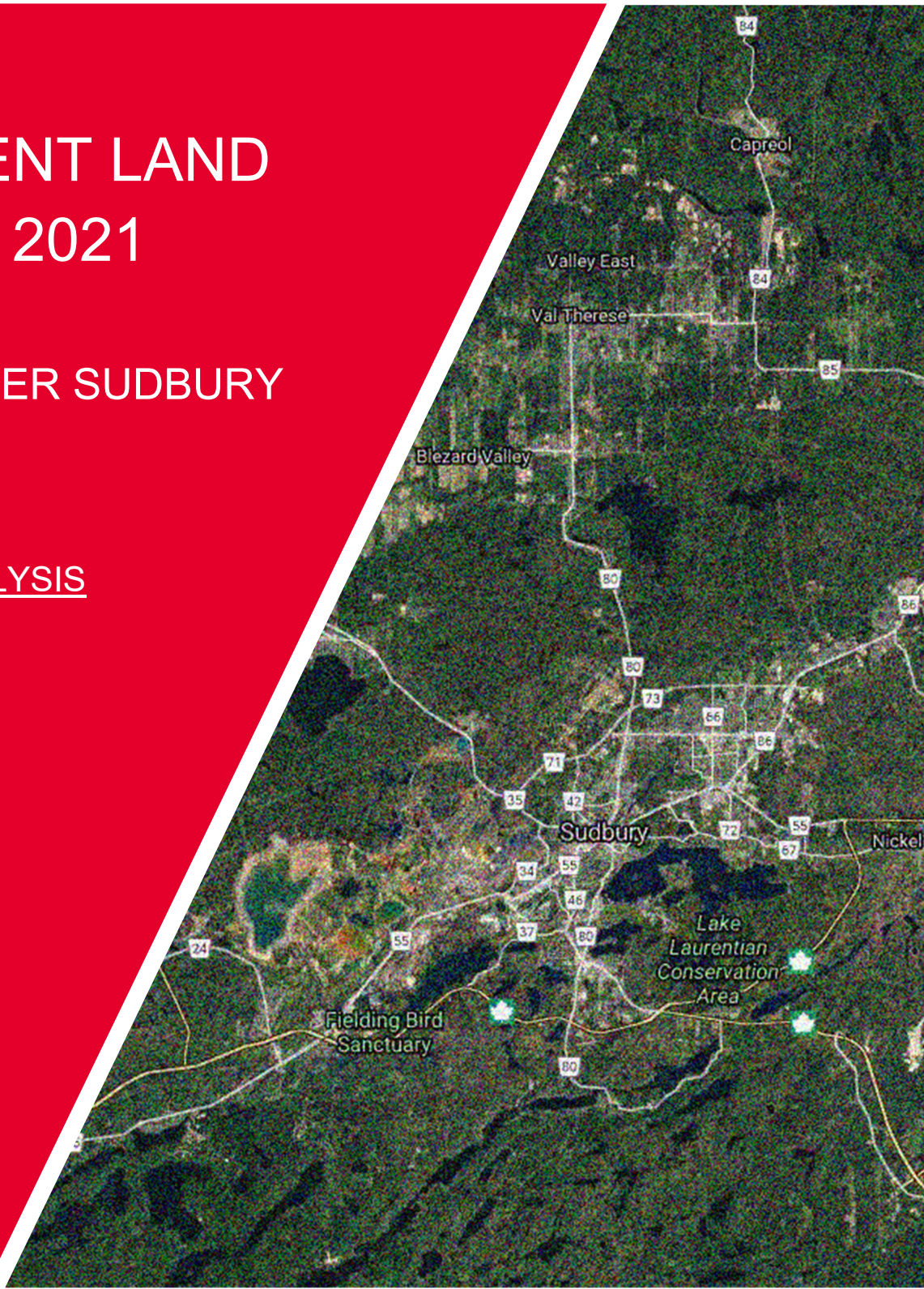
EMPLOYMENT LAND STRATEGY 2021

CITY OF GREATER SUDBURY

DELIVERABLE #2

LAND SUPPLY ANALYSIS



2.0 LAND SUPPLY ANALYSIS

2.1 Overview of Approach and Methodology

The Consultant Team used Geographic Information Systems (GIS) data provided by City staff to identify the inventory of employment lands city-wide – both occupied sites (those with one or more buildings), as well as vacant sites (undeveloped land). Our analysis focused on sites under the following Official Plan designations: Downtown, Regional Centre, Town Centre, Mixed Use Commercial, General Industrial, Heavy Industrial, and Institutional. Sites located under the following Official Plan designations were not relevant to our analysis of lands that support employment: Living Area 1, Living Area 2, Urban Expansion Reserve, Mining/Mineral Reserve, Aggregate Reserve, Agricultural Reserve, Parks & Open Space, and Rural. Of note, while there may be future employment generated on lands identified as Mining/Mineral Reserve, Aggregate Reserve, and Agricultural Reserve, this Employment Land Strategy is focused on Industrial, Commercial, and Institutional land requirements.

There are over 3,000 properties – individual Assessment Roll Numbers (ARN) – across Greater Sudbury identified within the Official Plan designations that are the focus of our analysis. For the purposes of this study, an individual property refers to a single Assessment Roll Number (which may be comprised of more than one parcel of land, all of which share that ARN).

In some cases, due to the nature of the GIS mapping and the potential for an overlap across a single site of more than one Official Plan designation (e.g. General Industrial and Parks & Open Space), it was necessary to take a close look at the mapping to identify whether or not a given property was suited for inclusion in the overall employment land inventory (i.e. in this stated example, is it potentially developable land, or is there a body of water present or other feature that it might preclude development as an employment use?).

The City of Greater Sudbury covers a vast land area, and is a geographically dispersed cluster of settlements located around the urban core of Sudbury. The GIS data enabled the Consultant Team to identify whether an individual property is located within an established Settlement Area, or whether it is located beyond a Settlement Area boundary (note: when a property straddled a boundary, it was considered to be inside the Settlement Area, for the purposes of our analysis). This employment land inventory is focused on properties within the Settlement Areas across Greater Sudbury. Should the land supply and demand analysis indicate that there is a shortfall of suitable properties to accommodate growth, it may be necessary to explore the viability of adjusting Settlement Area boundaries; however, at this initial stage of the analysis, such work is considered premature. In our inventory, we have identified the geography associated with each property, drawing upon the former Secondary Plan names that were in place pre-amalgamation, in order to understand the spatial distribution of employment lands across the city.

The data provided by City staff has enabled the Consultant Team to compile a comprehensive employment land inventory with the following attributes for each property:

- Municipal address;
- Settlement name, former Secondary Plan name, and identified geography for our analysis;
- Location within or beyond a Settlement Area boundary;
- Municipal Property Assessment Corporation (MPAC) property code and description;
- Land area, in hectares (ha);
- Building footprint, in square metres (m^2);
- Site coverage – the building footprint divided by the land area, as a percentage (%);

- Official Plan designation(s) and Zoning designation(s);
- Property owner (including City-owned properties); and,
- Whether there is water and/or wastewater and/or natural gas service to the property, or within a 50 metre buffer of the property line.

The preceding information was used by the Consultant Team to identify whether or not each property should be included as part of the City's employment land inventory. The following additional notes apply to our development of the inventory:

- Properties associated with utilities have been excluded from the employment land inventory – whether occupied or vacant. While some future employment growth may be related to these sites, it is not part of the focus of this report. The following MPAC property codes apply to this exception:
  - 555 – OPG hydraulic generating station
  - 558 – Hydro One transformer station
  - 560 – MEU transformer station
  - 561 – Hydro One right-of-way
  - 590 – Water treatment/filtration/water towers/pumping station
  - 591 – Sewage treatment/waste pumping/waste disposal
  - 595 – Heat or steam plant
- Surface parking lots – whether in conjunction with another property, or a stand-alone use – are a feature of the built environment across the city, and account for a share of the vacant designated lands. We have taken these sites into consideration in our employment land inventory as follows:
  - There are 32 properties identified as MPAC code 480 – Surface parking lot which excludes parking facilities that are used in conjunction with another property. These properties are predominantly located within the Downtown area (28 of the 32 properties), and are generally very small (all are less than one-third of a hectare). While these have been included as part of the vacant employment land inventory, it must be recognized that any future development of these sites may require the parking to be replaced in order to maintain an adequate supply in the Downtown area. However, given the small size of many of these sites, future development may not be feasible.
  - There are 41 properties identified as MPAC code 482 – Surface parking lot used in conjunction with another property. These properties are predominantly located within the Downtown area (26 properties) and in the Mixed Use Commercial areas (11 properties). These sites are generally quite small (37 of the 41 properties are less than one-third of a hectare), and collectively total approximately 9 hectares in size. While these properties are included within the vacant employment land inventory, it is unlikely that they will meaningfully contribute to future development within the city, from a land needs perspective, given their association with another (likely adjacent) parcel of land which has been developed.
- In terms of identifying the level of municipal services available to undeveloped employment lands, we have used GIS data to determine whether there is water and/or wastewater and/or natural gas service available directly to the site, or within a 50 metre buffer from the property boundary (considered readily serviceable, and classified as "serviced" in our database, for the purpose of this analysis). We were unable to identify the extent of hydro service available, due to GIS data limitations. This will be addressed separately in a later section of this report.

The Consultant Team has developed a detailed inventory of vacant employment land by type for the City of Greater Sudbury, as presented below.

2.2 Industrial Land Supply

2.2.1 Analysis of Industrial Land Supply

The Consultant Team has identified a vacant industrial land inventory of over 830 gross hectares across 150 individual sites within the Settlement Areas that comprise Greater Sudbury. These vacant lands are distributed across the two types of Official Plan categories of industrial land as follows: General Industrial (783 gross hectares – 94% share of all vacant Industrial-designated land), and Heavy Industrial (49 gross hectares – 6% share of total). While the Official Plan identifies that general industrial uses may be permitted in Mixed Use Commercial areas (subject to certain conditions being met), for the purposes of preparing this industrial land inventory, we have focused our review on only the General Industrial and Heavy Industrial-designated lands.

In terms of municipal services (including water, wastewater, and natural gas), 46% of the total vacant industrial land supply (General Industrial and Heavy Industrial, combined) is serviced (382 hectares), 38% is partially serviced (318 hectares), and 16% is unserviced (132 hectares).

VACANT INDUSTRIAL LAND BY OFFICIAL PLAN DESIGNATION AND SERVICING STATUS

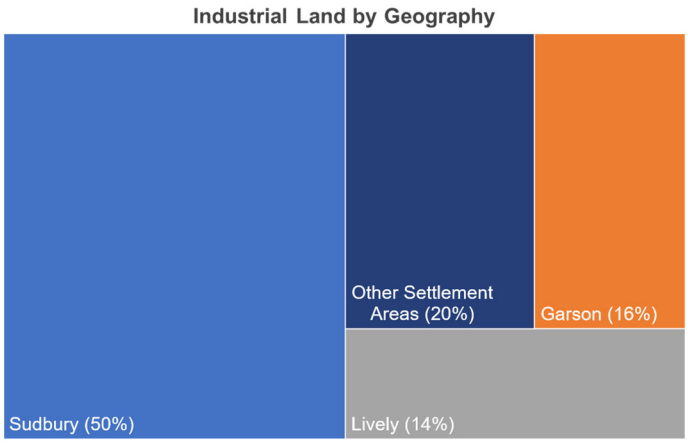
Official Plan Designation	Serviced		Partially-Serviced		Unserviced		TOTAL	
	# of sites	Area (ha)	# of sites	Area (ha)	# of sites	Area (ha)	# of sites	Area (ha)
General Industrial	69	382.1	58	269.1	21	131.5	148	782.6
Heavy Industrial	0	0.0	2	49.0	0	0.0	2	49.0
TOTAL	**69**	**382.1**	**60**	**318.1**	**21**	**131.5**	**150**	**831.6**

The exhibit below illustrates the location of occupied and vacant Industrial-designated lands across Greater Sudbury, by geographic area.

INDUSTRIAL LAND BY GEOGRAPHY

Geography	Occupied (ha)	% Share	Vacant (ha)	% Share	TOTAL (ha)	% Share
Sudbury	1,202.0	54%	340.7	41%	1,542.7	50%
Garson	457.8	20%	36.7	4%	494.5	16%
Lively	322.8	14%	94.2	11%	417.0	14%
Coniston	69.1	3%	226.2	27%	295.3	10%
Valley East	55.4	2%	80.0	10%	135.4	4%
Capreol	73.7	3%	0.5	0%	74.1	2%
Chelmsford	13.4	1%	52.2	6%	65.6	2%
Onaping	28.0	1%	0.0	0%	28.0	1%
McFarlane Lake Flats	16.2	1%	0.0	0%	16.2	1%
Other Settlement Areas	4.5	0%	1.2	0%	5.7	0%
TOTAL	**2,243.0**	**100%**	**831.6**	**100%**	**3,074.6**	**100%**

- Sudbury is home to roughly one-half of the occupied Industrial-designated lands and approximately 40% of the vacant Industrial-designated lands, with a total of some 1,540 hectares. Of this supply, just over 340 hectares is vacant.
- Garson has the second largest inventory of industrial land (close to 500 hectares), followed by Lively (roughly 420 hectares).
- Coniston is home to Greater Sudbury's second largest inventory of vacant Industrial-designated lands, at close to 230 hectares.

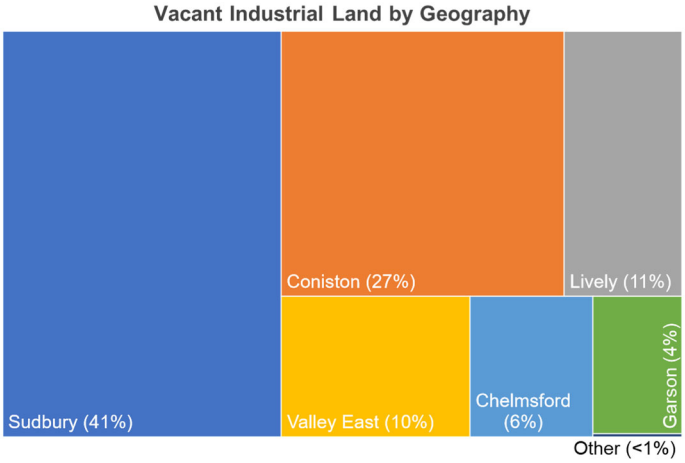


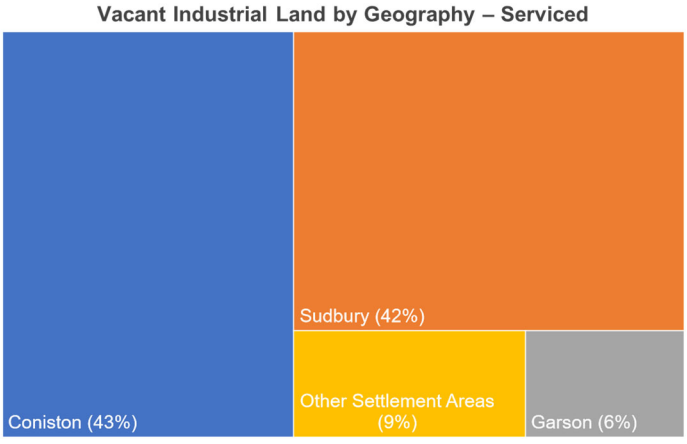
- Together, the three Settlement Areas of Sudbury, Garson, and Lively account for 80% of the City's total Industrial-designated lands, and 57% of the vacant land supply.

The following identifies the vacant industrial lands by geography, along with servicing status.

VACANT INDUSTRIAL LAND BY GEOGRAPHY AND SERVICING STATUS

Geography	Serviced (ha)	% Share	Partially-Serviced (ha)	% Share	Unserviced (ha)	% Share	TOTAL (ha)	% Share
Sudbury	161.3	42%	137.3	43%	42.1	32%	340.7	41%
Coniston	163.4	43%	0.0	0%	62.9	48%	226.2	27%
Lively	5.9	2%	72.4	23%	15.9	12%	94.2	11%
Valley East	9.4	2%	70.6	22%	0.0	0%	80.0	10%
Chelmsford	17.1	4%	35.1	11%	0.0	0%	52.2	6%
Garson	23.4	6%	2.7	1%	10.6	8%	36.7	4%
Other Settlement Areas	0.7	0%	0.0	0%	0.0	0%	0.7	0%
TOTAL	**382.1**	**100%**	**318.1**	**100%**	**131.5**	**100%**	**831.6**	**100%**





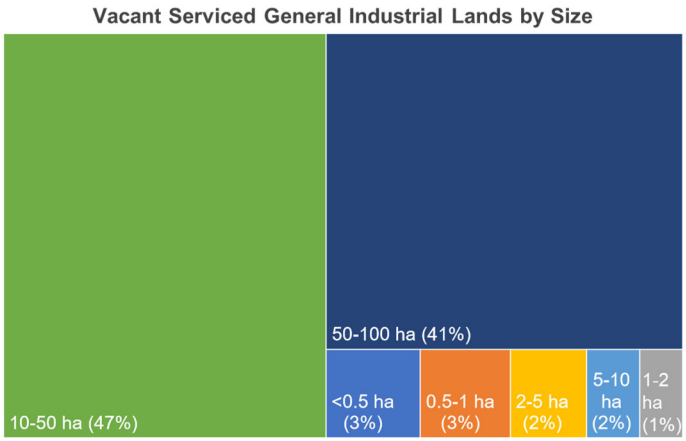
- Together, Sudbury and Coniston account for 85% of the vacant, serviced industrial land (325 hectares, split evenly between the two Settlement Areas). Garson (23 hectares, 6% share) represents the next largest opportunity for serviced industrial land.
- Partially-serviced lands refer to properties with one or two but not all three of the following services: water, wastewater, and natural gas (either in-place, or available within 50 metres of the property line). Partially-serviced lands total nearly 320 hectares within Settlement Areas city-wide (accounting for almost 40% of the total Industrial-designated land supply), and may represent an opportunity to accommodate future growth, depending on the needs of occupiers.

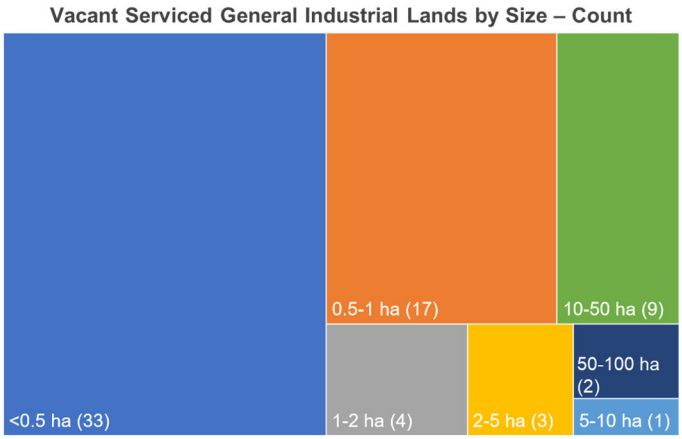
Since there is only a single large, vacant site designated as Heavy Industrial (a nearly 50-hectare parcel located at 3045 Lasalle Boulevard, on the east side of Sudbury), our remaining analysis of vacant Industrial-designated land is focused on the General Industrial category. The exhibit below illustrates the distribution of vacant General Industrial-designated lands by parcel size and servicing.

VACANT GENERAL INDUSTRIAL LANDS BY PROPERTY SIZE AND SERVICING

	<0.5 ha	0.5-1 ha	1-2 ha	2-5 ha	5-10 ha	10-50 ha	50-100 ha	>100 ha	TOTAL ha
Serviced									
# of Parcels	33	17	4	3	1	9	2	0	**69**
Total Area (ha)	11.6	11.1	5.3	9.4	6.6	181.4	156.6	0.0	**382.1**
% Share of Total Area									**46%**
Partially Serviced									
# of Parcels	19	10	11	7	3	9	1	0	**60**
Total Area (ha)	5.8	6.5	14.6	25.3	20.0	185.4	60.6	0.0	**318.1**
% Share of Total Area									**38%**
Unserviced									
# of Parcels	11	1	2	1	3	2	1	0	**21**
Total Area (ha)	3.5	0.5	2.6	4.1	22.4	35.5	62.9	0	**131.5**
% Share of Total Area									**16%**
TOTAL									
# of Parcels	63	28	17	11	7	20	4	0	**150**
Total Area (ha)	20.9	18.1	22.5	38.7	49.0	402.3	280.1	0	**831.6**
% Share of Total Area									**100%**

- In terms of parcel size, just over 70% of the vacant General Industrial-designated industrial parcels are less than 2 hectares in size (and 60% are less than 1 hectare), meaning that there is a limited range of site selection options for users seeking a large site for development.





In addition to this analysis of undeveloped (unoccupied) lands, there is potential capacity across the existing stock of developed industrial lands to accommodate future growth. In particular, properties that exhibit a low site coverage (the building footprint divided by the land area, typically expressed as a percentage) may offer excess land that can accommodate expansion.

For industrial uses, a typical site coverage is in the range of 25-30%. This facilitates sufficient space for shipping/receiving and truck movements, staff parking, outside materials storage, landscaping, etc. In high-cost land markets, the industrial site coverage may reach 40% for some properties (particularly warehousing and distribution-type uses, with some on-site truck parking, but no outside materials storage). Properties with a very high site coverage may serve a function as ancillary buildings on small sites that are adjacent to other primary business operations. Properties with a high site coverage very likely have no future intensification potential through building expansion. In lower cost land markets – and where storage of vehicles, machinery, and raw and finished goods is a prevalent feature in industrial areas – the typical site coverage may be as low as 15-20%. A low site coverage ratio could also be influenced by minimum distance separation requirements from adjacent properties, depending on the on-site use. Undevelopable land due to topography, soil conditions, and/or natural features may also be a limiting factor.

In reviewing the City's GIS data, developed industrial lands across Greater Sudbury have an average site coverage of just 13%. This overall average is impacted by the presence of some very large land parcels with comparatively limited building space on site – in many cases related to resource extraction. When only smaller land parcels are considered, sites less than 2 hectares in size have an average site coverage of 16%, while sites less than 1 hectare average approximately 17%.

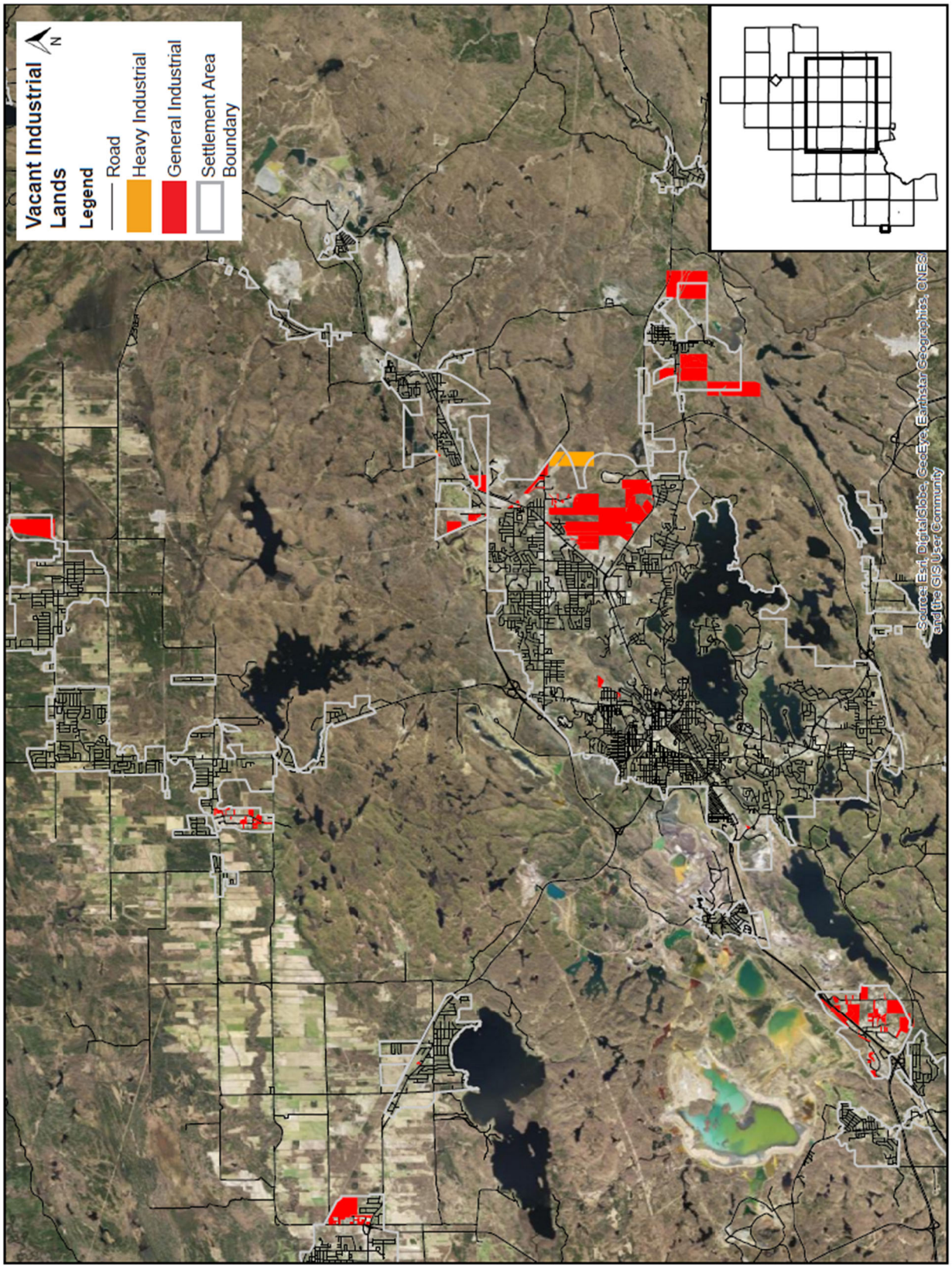
This analysis of industrial site coverage suggests that there is some capacity for expansion across the existing industrial stock to accommodate future industrial-type employment growth. However, while this enables expansion of existing businesses, it does not address land needs for new market entrants. Accordingly, it is incumbent upon the City to plan for a 20-year supply of employment land for development purposes.

2.2.2 Conclusions

At an aggregate level, there is a considerable supply of remaining undeveloped, designated industrial lands across Greater Sudbury. This is particularly the case for General Industrial-designated sites (over 780 vacant hectares). However, the location, size, and servicing status of these lands must be considered in assessing their capacity to be absorbed over time. As well, there are existing occupied lands which may represent opportunities for intensification, or potentially redevelopment. Further, there are serviced employment lands at Greater Sudbury Airport that may be suitable for industrial development (excluded from our inventory) – although these lands are not available for acquisition. These Airport lands would be subject to a land lease arrangement.

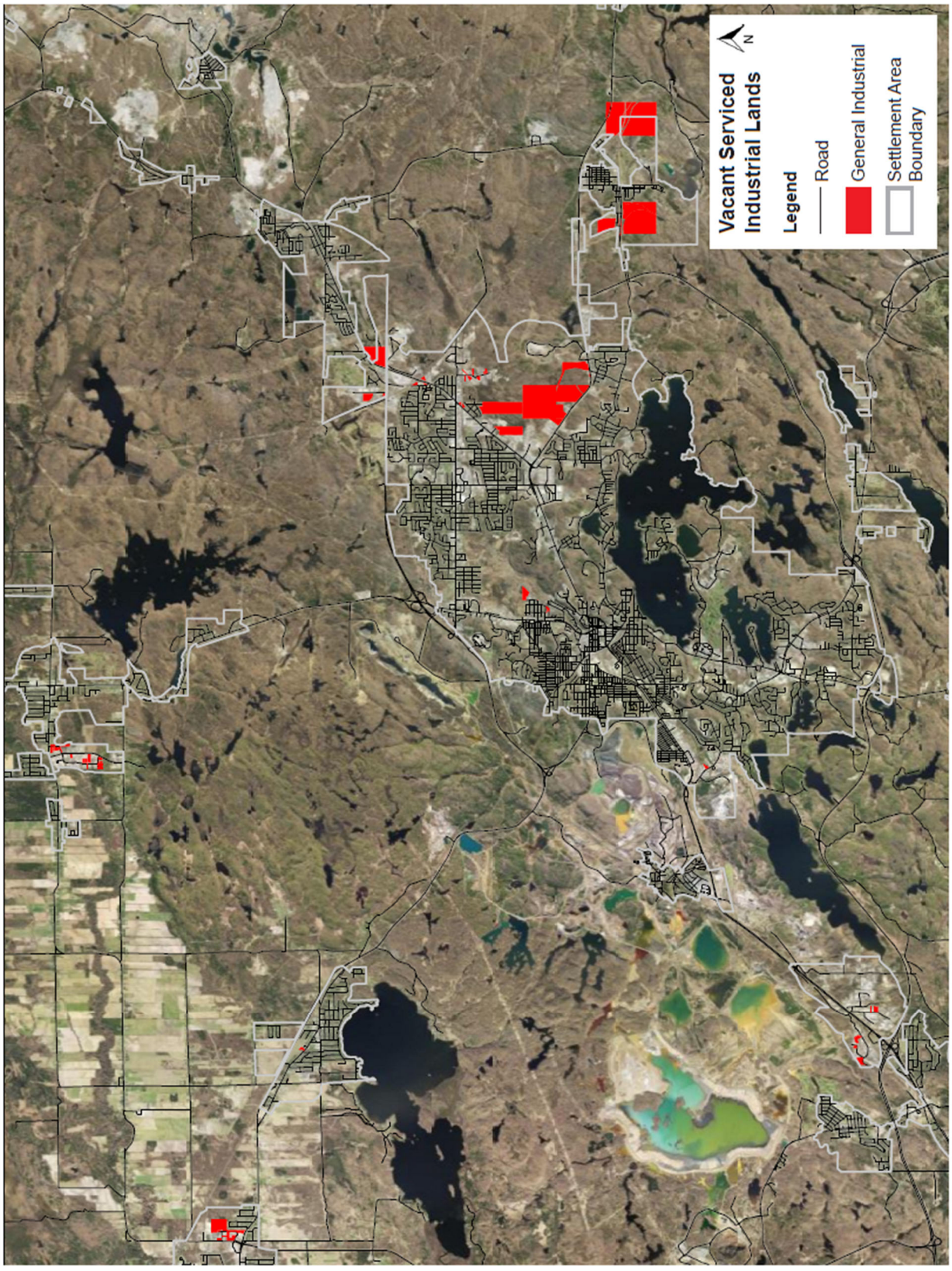
2.2.3 Vacant Industrial Lands Map

The following map identifies the vacant industrial lands across the city, by type (General Industrial and Heavy Industrial).



2.2.4 Vacant Serviced Industrial Lands Map

The following map identifies the vacant, serviced industrial lands across the city (all of which are General Industrial).



2.3 Local Industrial Market Perspectives

In June 2020, members of the Consultant Team completed market reconnaissance of the city's industrial/business park areas. Our focus was on the industrial areas in Sudbury and Lively, which comprise the vast majority of the City's designated Industrial lands. The more outlying Settlement Areas were not visited, although a desktop inspection of available mapping was completed. The following is a summary of key observations:

- Single occupant buildings constitute a significant share of the properties located in Greater Sudbury's industrial areas, as opposed to multi-tenanted properties. This is likely due to the presence of a high degree of owner-occupied buildings (as opposed to investor-owned buildings leased to tenants) in this market.
- The Consultant Team observed very little space for lease, as indicated by a scarcity of real estate brokerage signage within the industrial areas. It is our impression that the relatively high rate of owner-occupied buildings contributes to this low vacancy rate observed.
- In some areas, there is a significant amount of outside storage of vehicles, machinery, equipment, and materials. In particular, heavy vehicle/equipment storage is a common feature of Greater Sudbury's industrial areas, due to the extent of mining and related support activity that takes place nearby.

2.4 Commercial Land Supply

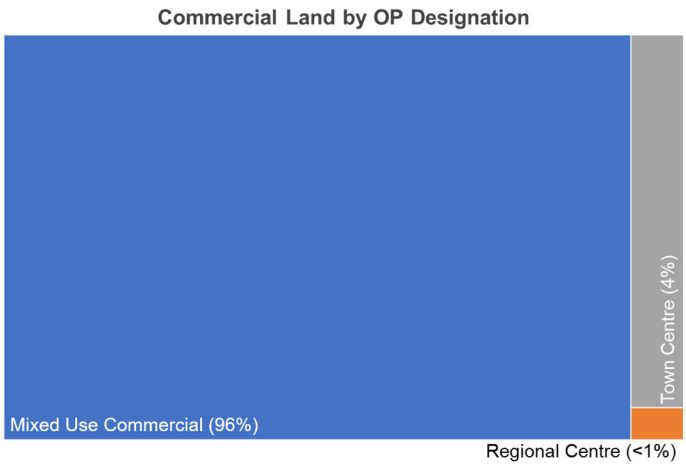
2.4.1 Analysis of Commercial Land Supply

The Consultant Team has identified a vacant commercial land inventory of some 340 gross hectares across nearly 160 individual sites. These vacant lands are distributed across the three types of Official Plan categories of commercial land as follows: Mixed Use Commercial (326 gross hectares – a 96% share of all vacant Commercial-designated land), Town Centre (just over 12 hectares, 4% share), and Regional Centre (1 gross hectares, <1% share).

In terms of servicing, close to one-half of the vacant Commercial-designated land is unserviced – although this comment pertains entirely to two properties located in the south part of Sudbury (southeast of the Long Lake Road and Trans-Canada Highway interchange) which are partially designated as Mixed Use Commercial, and partially Rural (due to their large size).

VACANT COMMERCIAL LANDS BY OFFICIAL PLAN DESIGNATION AND SERVICING STATUS

Official Plan Designation	Serviced		Partially-Serviced		Unserviced		TOTAL	
	# of sites	Area (ha)	# of sites	Area (ha)	# of sites	Area (ha)	# of sites	Area (ha)
Mixed Use Commercial	127	156.2	8	10.6	2	158.9	137	325.7
Regional Centre	3	1.0	0	0.0	0	0.0	3	1.0
Town Centre	17	12.1	0	0.0	0	0.0	17	12.1
TOTAL	**147**	**169.3**	**8**	**10.6**	**2**	**158.9**	**157**	**338.8**

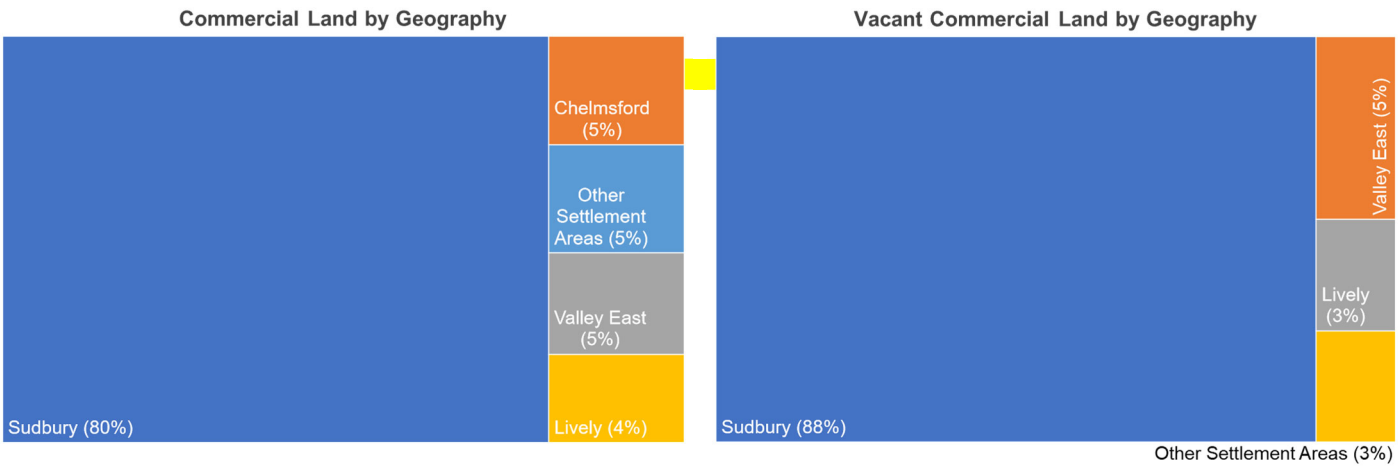


The exhibit below illustrates the location of occupied and vacant Commercially-designated lands across Greater Sudbury, by geographic area.

COMMERCIAL LAND BY GEOGRAPHY

Geography	Occupied (ha)	% Share	Vacant (ha)	% Share	TOTAL (ha)	% Share
Sudbury	541.9	76%	299.3	88%	841.2	80%
Chelmsford	51.3	7%	4.6	1%	55.9	5%
Valley East	34.3	5%	17.8	5%	52.1	5%
Lively	34.7	5%	10.9	3%	45.6	4%
Garson	14.3	2%	0.3	0%	14.6	1%
Capreol	5.6	1%	5.0	1%	10.7	1%
Dowling	8.9	1%		0%	8.9	1%
Azilda	6.6	1%	0.3	0%	6.9	1%
Coniston	4.7	1%		0%	4.7	0%
Other Settlement Areas	9.3	1%	0.6	0%	9.9	1%
TOTAL	**711.6**	**100%**	**338.8**	**100%**	**1,050,5**	**100%**

- Sudbury is home to 80% of the overall Commercial-designated land supply, and nearly 90% of the vacant Commercially-designated lands in the city.
- Valley East (nearly 18 hectares, 5% share of vacant commercial land supply) and Lively (nearly 11 hectares, 3% share) also contribute to opportunities for future commercial development in Greater Sudbury. The remaining Settlement Areas have only limited commercial lands.

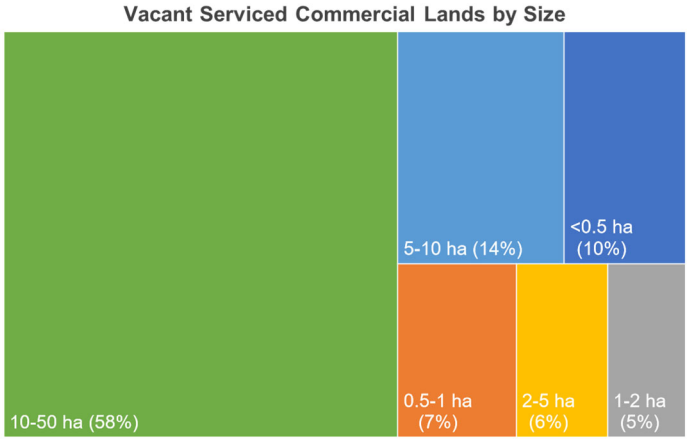


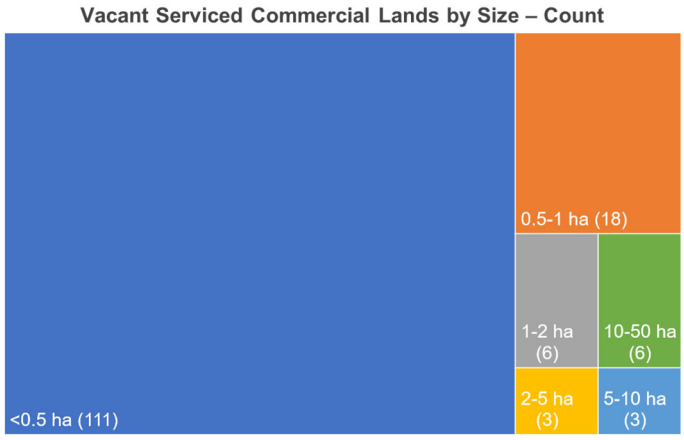
The exhibit below illustrates the distribution of vacant, serviced Commercial-designated lands by parcel size and Official Plan designation.

VACANT SERVICED COMMERCIAL LANDS BY PROPERTY SIZE AND OFFICIAL PLAN DESIGNATION

	<0.5 ha	0.5-1 ha	1-2 ha	2-5 ha	5-10 ha	10-50 ha	>50 ha	TOTAL ha
Mixed Use Commercial								
# of Parcels	95	15	6	3	2	6	0	**127**
Total Area (ha)	15.4	10.5	8.3	9.7	14.4	97.9	0.0	**156.2**
% Share of Total Area								**92%**
Regional Centre								
# of Parcels	2	1	0	0	0	0	0	**3**
Total Area (ha)	0.3	0.7	0.0	0.0	0.0	0.0	0.0	**1.0**
% Share of Total Area								**1%**
Town Centre								
# of Parcels	14	2	0	0	1	0	0	**17**
Total Area (ha)	1.5	1.4	0.0	0.0	9.2	0.0	0.0	**12.1**
% Share of Total Area								**7%**
TOTAL								
# of Parcels	111	18	6	3	3	6	0	**147**
Total Area (ha)	17.2	12.6	8.3	9.7	23.6	97.9	0.0	**169.3**
% Share of Total Area								**100%**

- By count of property, there is a concentration of undeveloped, serviced Commercial-designated sites in the smallest categories (properties less than 1 hectare in size account for 129 of the total 147 sites, or almost 90% of all parcels). This means that that there is a limited range of site selection options for users seeking a large parcel for development with servicing in place.





The 25 largest existing retail-commercial properties in the city have an average site coverage of 26%, which is considered typical (25% is a reasonable benchmark). This scale of development enables sufficient parking space and circulation, plus shipping/receiving, and on-site landscaping. Overall, it can be concluded that there likely is limited capacity across the existing retail-commercial inventory to absorb additional floorspace.

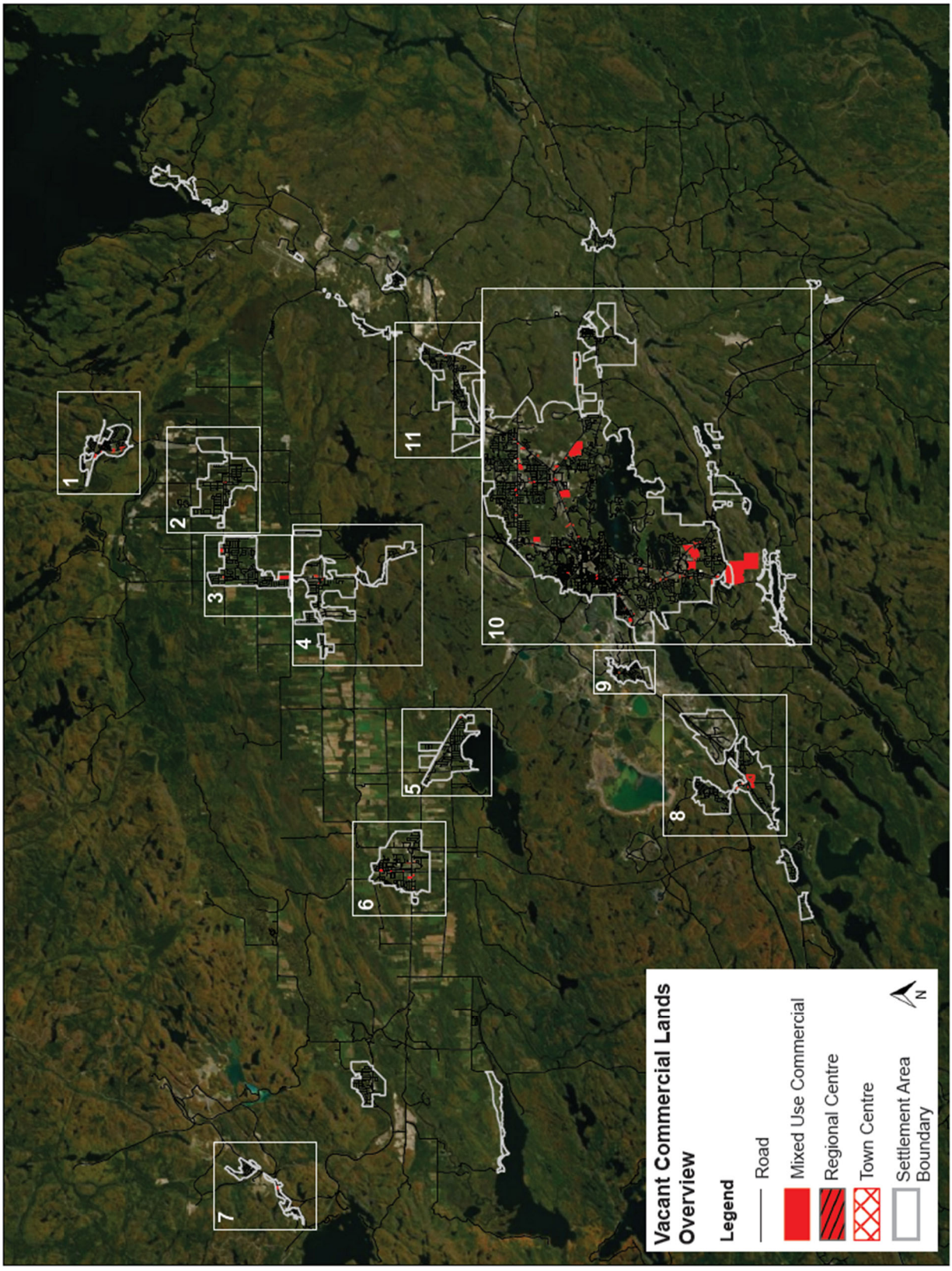
2.4.2 Conclusions

While there is an identified supply of nearly 340 hectares of Commercially-designated lands city-wide – almost half of which is serviced – there are limitations to the development prospects for a portion of this supply. The vast majority of these vacant lands are Mixed Use Commercial, meaning that the Regional Centre designation has only a limited extent of vacant lands. However, there may be considerable potential to intensify some existing large sites, as well as redevelop under-performing properties over time.

When examining the property size by count of parcels available, it is clear that the smallest parcels account for the largest share of available, serviced lands (properties less than 1 hectare in size account for 129 of the total 147 sites, or 90% of all parcels). However, the limited extent of larger, undeveloped, Commercially-designated lands may not be problematic, depending on the outcome of the land demand assessment, which is presented in a later section of this report.

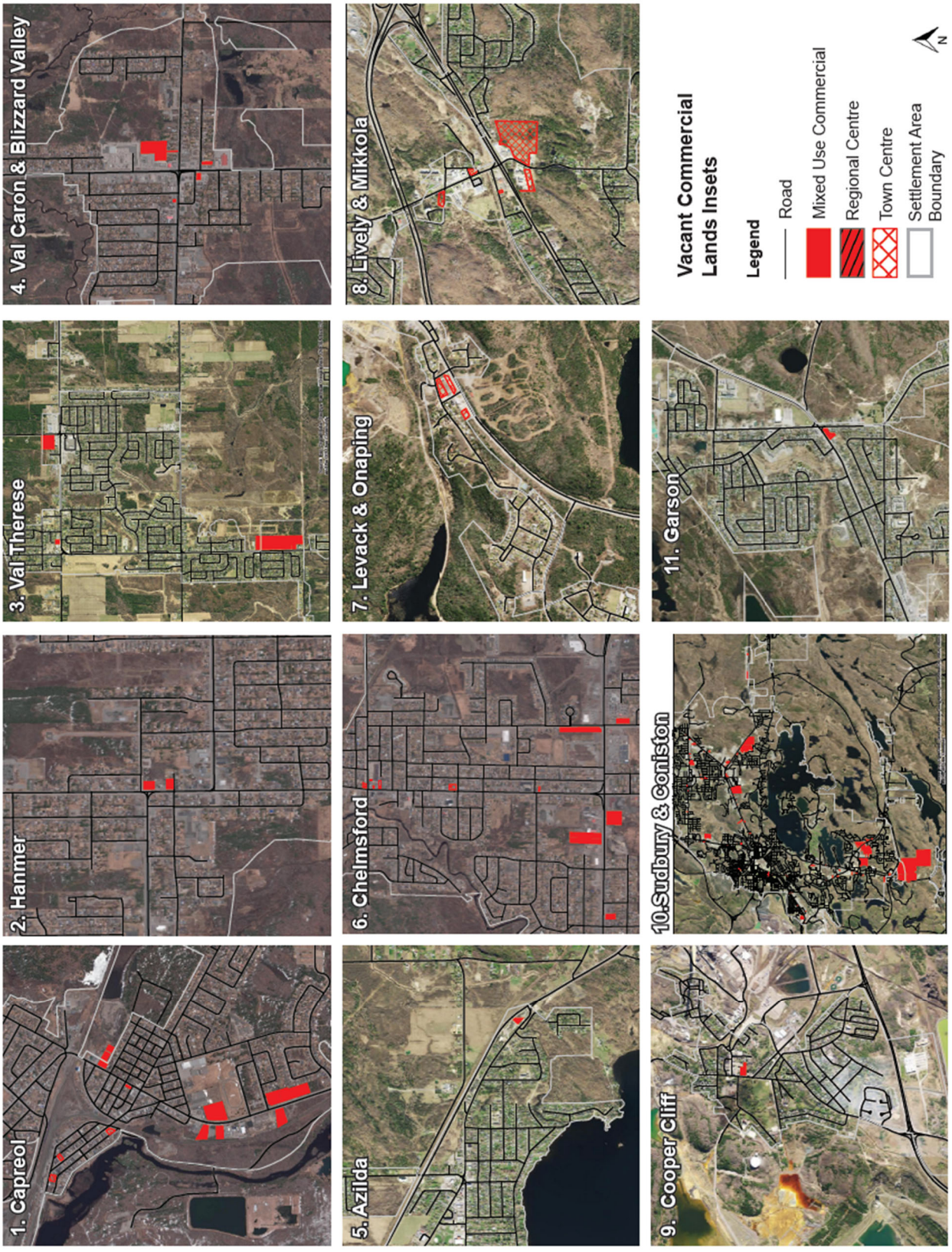
2.4.3 Vacant Commercial Lands Map – Overview

The following map identifies the vacant commercial lands across the city, by type (Mixed Use Commercial, Regional Centre, and Town Centre). Please refer to the insets on the following page.



2.4.4 Vacant Commercial Lands Map – Insets

The following map insets identify the vacant commercial lands across the city, by type (Mixed Use Commercial, Regional Centre, and Town Centre).



2.5 Shopping Centre Space

The Centre for the Study of Commercial Activity (CSCA) maintains an inventory of shopping centre space in major Canadian markets. In 2016, CSCA identified nearly 57 million m^2 of shopping centre space across the country, or 1.57 m^2 per capita. Canada's 28 Census Metropolitan Areas (CMAs) have on average 1.78 m^2 per capita – a higher figure, since major retail uses are concentrated in urban areas, rather than smaller, outlying communities. The Greater Sudbury CMA, with a 2016 population of 165,536, had 1.96 m^2 of shopping centre space per capita. This translates to a shopping centre inventory of approximately 324,500 m^2 for Greater Sudbury.

In a 2018 report, CSCA groups the 28 CMAs into five "clusters", based upon shared economic and demographic indicators including population size, population growth rate, and personal income per capita. Greater Sudbury is clustered with Québec City, London, Oshawa, Windsor, Sherbrooke, Kingston, Saguenay, Trois-Rivières, Moncton, and Thunder Bay. These 11 CMAs mostly range in population from 100,000-400,000, have shopping centre space per capita ratios below or close to the overall CMA average, personal income below the overall average, and low population growth rates. These CMAs are characterized as traditional regional service centres originally established with respect to an agricultural or logging hinterland that now provide a full range of commercial, public administration, higher education, and health care activities.[1]

ECONOMIC AND DEMOGRAPHIC INDICATORS BY CMA

Census Metropolitan Area	Population 2016	Population Annual Growth Rate 2014-2016	Personal Income per Capita	Shopping Centre Space per Capita (m^2)	Shopping Centre Space per $Million Personal Income (m^2)
Québec City	807,211	0.67%	$45,715	1.70	37.07
London	512,432	1.04%	$42,363	1.90	44.78
Oshawa	393,977	1.30%	$45,173	1.93	42.74
Windsor	340,279	0.88%	$42,989	1.79	41.71
Sherbrooke	215,594	0.89%	$40,191	0.99	39.20
Kingston	171,372	0.94%	$44,655	1.69	37.81
Greater Sudbury	**165,536**	**-0.08%**	**$45,749**	**1.96**	**42.83**
Saguenay	159,669	-0.18%	$40,921	1.65	40.32
Trois-Rivières	157,764	0.48%	$41,302	1.51	36.70
Moncton	149,744	1.14%	$43,135	1.87	43.39
Thunder Bay	124,166	-0.33%	$44,966	1.74	38.74
Cluster Mean (unweighted)	**190,700**	**0.61%**	**$43,378**	**1.76**	**40.51**
28 Canadian CMAs (unweighted)	**882,350**	**1.12%**	**$45,951**	**1.86**	**40.69**

Source: CSCA

Greater Sudbury exhibits a population growth rate (2014-2016) that is below the average for the 28 Canadian CMAs, including many of the other markets within the cluster. While this is true for the brief time period indicated (2014-2016), Greater Sudbury's population actually increased overall from 2011-2016 by approximately 1,620 persons, or 1.0% (source: Census of Canada).

[1] Shopping Centre Over-Spacing in Canadian Cities. Centre for the Study of Commercial Activity. 2018. p. 8.

Greater Sudbury's personal income per capita is on par with the average for the Canadian CMAs, and above the average for the comparative markets. Notably, on a per capita basis, the amount of shopping centre space in Greater Sudbury is greater than the cluster mean, and the average figure for the 28 CMAs.

While CSCA remarks that there is evidence in their low growth rates and average incomes to suggest that the shopping centres in this CMA cluster might be susceptible to eCommerce impacts and could be considered "over-spaced", they also note that there may be some further nuance with respect to retail space needs in the local markets that warrants further investigation.[2] For the purposes of this report, it can be concluded that the present shopping centre inventory in Greater Sudbury represents an over-supply risk – certainly relative to comparative markets – although retail trends such as declining store sizes and the increasing consumer adoption of eCommerce are topics that needs to be considered in greater detail in terms of growth management decision-making.

The following exhibit identifies the 22 largest shopping centres in Greater Sudbury, as identified in the Canadian Directory of Shopping Centres.

SHOPPING CENTRES IN GREATER SUDBURY

Centre Name	Type	Year Opened	GLA (m^2)	Major Tenant(s)
RioCan Centre Sudbury	Power Centre	1999	62,170	Costco, Home Depot, Cineplex, Staples
New Sudbury Centre	Regional	1957	52,736	Walmart, Sport Chek, Shoppers Drug Mart
Rainbow Centre Mall	Retail Mixed Use	1971	32,516	Hart, World Gym, Imagine Cinemas
Southridge Mall	Community	1981	30,658	Giant Tiger, TSC Stores, Sport Chek, Fabricland
SmartCentres Sudbury	Power Centre	2010	21,639	Walmart, Dollarama
Sudbury Place	Community	1981	17,835	Canadian Tire, Real Canadian Superstore
Silver Hills Centre	Power Centre	2009	13,935	Best Buy, Marshalls, Toys R Us
Place Bonaventure Mall	Community	1978	12,077	Your Independent Grocer, Hart
Place Val Est Shopping Centre	Neighbourhood	1983	10,273	Metro, Rossy
Lasalle Court Mall	Neighbourhood	1988	8,633	Metro
747 Notre Dame Ave.	Community	1998	8,451	The Brick, Staples, Dollarama
Notre Dame Square	Neighbourhood	1985	5,114	N/A
Garson Mall	Neighbourhood	1990	4,865	Foodland
Algonquin Square	Neighbourhood	1995	4,730	Smith's Markets
Cedar Pointe Plaza	Neighbourhood	1981	4,181	Bulk Barn
Four Corners Plaza	Neighbourhood	1979	3,962	Food Basics
Times Square	Neighbourhood	1975	3,918	N/A
Metro Plaza	Neighbourhood	1989	3,308	Metro
450 Notre Dame Ave.	Convenience	1984	3,298	N/A
Lasalle Street Plaza	Neighbourhood	1969	3,038	N/A
Lasalle Square	Neighbourhood	1989	2,602	N/A
1380 Lasalle Blvd.	Neighbourhood	1975	2,328	N/A
TOTAL			**312,265**	

Note: Major tenants verified using online sources August 28, 2020 (but subject to change).

[2] Shopping Centre Over-Spacing in Canadian Cities. Centre for the Study of Commercial Activity. 2018. p. 8.

2.6 Local Retail Market Perspectives

In June 2020, members of the Consultant Team completed market reconnaissance of the city's commercial areas. Our focus of interest was on the three Regional Centre areas, Sudbury's Mixed Use Commercial arterials, as well as the Downtown. The outlying Settlement Areas were not visited, although a desktop inspection of available mapping was completed. The following is a summary of key observations:

- The three Regional Centres each exhibit a very different character:
  - The Regional Centre in the north, at the intersection of Lasalle Boulevard and Barrydowne Road, is home to New Sudbury Centre – the largest enclosed regional shopping centre in Northern Ontario. It is situated directly across from Sudbury Place community shopping centre, creating a retail agglomeration. Beyond the Regional Centre's geographic limits, both Lasalle Boulevard and Barrydowne Road feature additional retail-commercial uses at various scales. This area appeared to exhibit a healthy level of occupancy (although a store-by-store inventory was not undertaken).
  - The Regional Centre at Kingsway and Silver Hills Drive/Barrydowne Road is a concentration of power centre-type uses – a spectrum of big box/small box retailers that are found in markets across Canada. With few exceptions, these properties appeared to be well occupied at the time of our inspection. Undeveloped lands (designated Mixed Use Commercial) on the west side of Silver Hills Drive at Kingsway have the potential to expand upon this critical mass of retail-commercial activity.
  - The Regional Centre in the southwest part of Sudbury is home to Southridge Mall. This enclosed, community-scale shopping centre has major tenants including Giant Tiger, TSC Stores, Sport Chek, and Fabricland. However, there is presently a considerable amount of available space within the mall, which has seen turnover of its anchor tenants (formerly department store and grocery store uses). In contrast to the other two Regional Centres, this area – which extends beyond the mall site – has considerable land remaining for future development, as well as prospective redevelopment sites.
- The city's Mixed Use Commercial corridors exhibit a range of uses, including a significant amount of retail-commercial development. The following observations pertain to various areas we toured:
  - Lorne Street – A principal east-west arterial in the west part of the city, Lorne Street (between Kelly Lake Road and Martindale Road) features a mix of industrial, commercial, retail, and motel properties. There are also some houses that have been converted to commercial use. While the properties along the north side of Lorne Street are generally small, the greater depth of some properties on the south side would more easily facilitate future redevelopment, should such demand arise.
  - Regent Street and Paris Street/Long Lake Road – The Mixed Use Commercial environment in the vicinity of the Regional Centre at the Four Corners is a concentration of retail-commercial activity. There are a mix of freestanding properties, strip plazas, and neighbourhood-scale shopping centres.
  - Kingsway – The portion of Kingsway between Kitchener Avenue and Silver Hills Drive is home to numerous restaurants and automotive-related businesses, including new and used vehicle sales, service, and rental. The properties tend to be freestanding, rather than multi-tenanted plazas/shopping centres. The commercial mix also includes hotels in the vicinity of Silver Hills Drive, and further to the east.
  - Falconbridge Road – The Mixed Use Commercial corridor along Falconbridge Road, northeast of Kingsway, is more commercial in character, as opposed to retail and personal services functions. There are a few automotive-related uses in this area.

  - Lasalle Boulevard – The principal east-west arterial across the north part of Sudbury, Lasalle Boulevard features a mix of land uses, including retail-commercial properties at all scales of development. A number of the shopping centres along Lasalle Boulevard were constructed in the 1970s and 1980s, with some newer freestanding properties completing the composition of this area, from a retail-commercial perspective.
  - Notre Dame Avenue – The Mixed Use Commercial corridor from Lasalle Boulevard south towards Downtown includes restaurants, freestanding sites, strip plazas, automotive uses, and big box retail – a wide variety of retail-commercial uses.
- Greater Sudbury's Town Centres are found in the Settlement Areas beyond Sudbury, and offer a range of retail-commercial uses at different scales that are guided by the size of the local population. Overall, there is only a limited amount of undeveloped land in the Town Centres category. The prospects for growth in the Town Centres will be dictated by future population increases in these communities, while recognizing that Sudbury itself will continue to be the dominant retail-commercial hub for the broader region.

2.7 Institutional Land Supply

2.7.1 Analysis of Institutional Land Supply

The city's existing institutional lands accommodate a range of uses, including: schools (elementary, secondary, post-secondary, and specialty uses); hospitals; nursing homes; other institutional residences; office buildings; a correctional facility; and others. These uses have varying site selection requirements, and are incorporated into the fabric of the community in different ways; some are campus settings, while others blend into the environment more seamlessly. These existing sites may offer the ability to accommodate on-site expansion to meet future growth.

In reviewing the large land holdings of Laurentian University, Cambrian College, and Collège Boréal, all three sites offer excess lands that would be suited to accommodate future institutional and related development. In contrast, one of the city's other large institutional sites, Health Sciences North, appears to have limited capacity for expansion.

In our assessment of Institutionally-designated lands across Greater Sudbury, the Consultant Team has not identified any vacant sites that are considered well-suited for future development. One vacant site (3.6 hectares) lies behind an institutional property located on 2nd Avenue N. It is a running track and playing field area, and has only limited roadway frontage, making development/redevelopment more challenging.

2.7.2 Conclusions

The Consultant Team has observed that the city has essentially no vacant (undeveloped) land specifically designated as Institutional to accommodate future needs – although certain Official Plan designations (such as Living Areas, where such uses are compatible with the residential function of neighbourhoods; Mixed Use Commercial; Regional Centres; Town Centres; and Downtown) permit institutional uses.

2.8 Downtown Land Supply

2.8.1 Analysis of Downtown Land Supply

The Consultant Team has identified a vacant land inventory of some 10 gross hectares across 79 individual sites in the Downtown. All of this land is serviced. Of these sites, 50 are surface parking lots. A total of 25 sites are surface parking lots used in conjunction with another property (1.9 hectares), while another 25 are parking lots not specifically associated with another property (3.4 hectares), which together total 5.3 hectares (or close to 50% of the vacant Downtown land supply).

VACANT DOWNTOWN LANDS								
Official Plan Designation	Serviced		Partially-Serviced		Unserviced		TOTAL	
	# of sites	Area (ha)	# of sites	Area (ha)	# of sites	Area (ha)	# of sites	Area (ha)
Institutional	79	10.4	0	0.0	0	0.0	79	10.4
TOTAL	**79**	**10.4**	**0**	**0.0**	**0**	**0.0**	**79**	**10.4**

2.8.2 Conclusions

In general, the vacant Downtown lands are very small parcels – 70 of the 79 sites are less than one-quarter of a hectare. While there are certainly sites that have the potential for future development, parking needs will have to be addressed, and it may be necessary to assemble multiple parcels (occupied and vacant) in order to execute a significant development/redevelopment project.

2.8.3 Vacant Downtown Lands Map

The following map identifies the vacant Downtown lands.