



# Employment Area Expansion Analysis

Municipality of Middlesex Centre

---

Final Report

February 4, 2022

Watson & Associates Economists Ltd.  
905-272-3600  
[info@watsonecon.ca](mailto:info@watsonecon.ca)

In association with:





# Appendix B

## Middlesex Centre Foreign Direct Investment Strategy Presentation



# Middlesex Centre Foreign Direct Investment Strategy

## Proposed Employment Areas

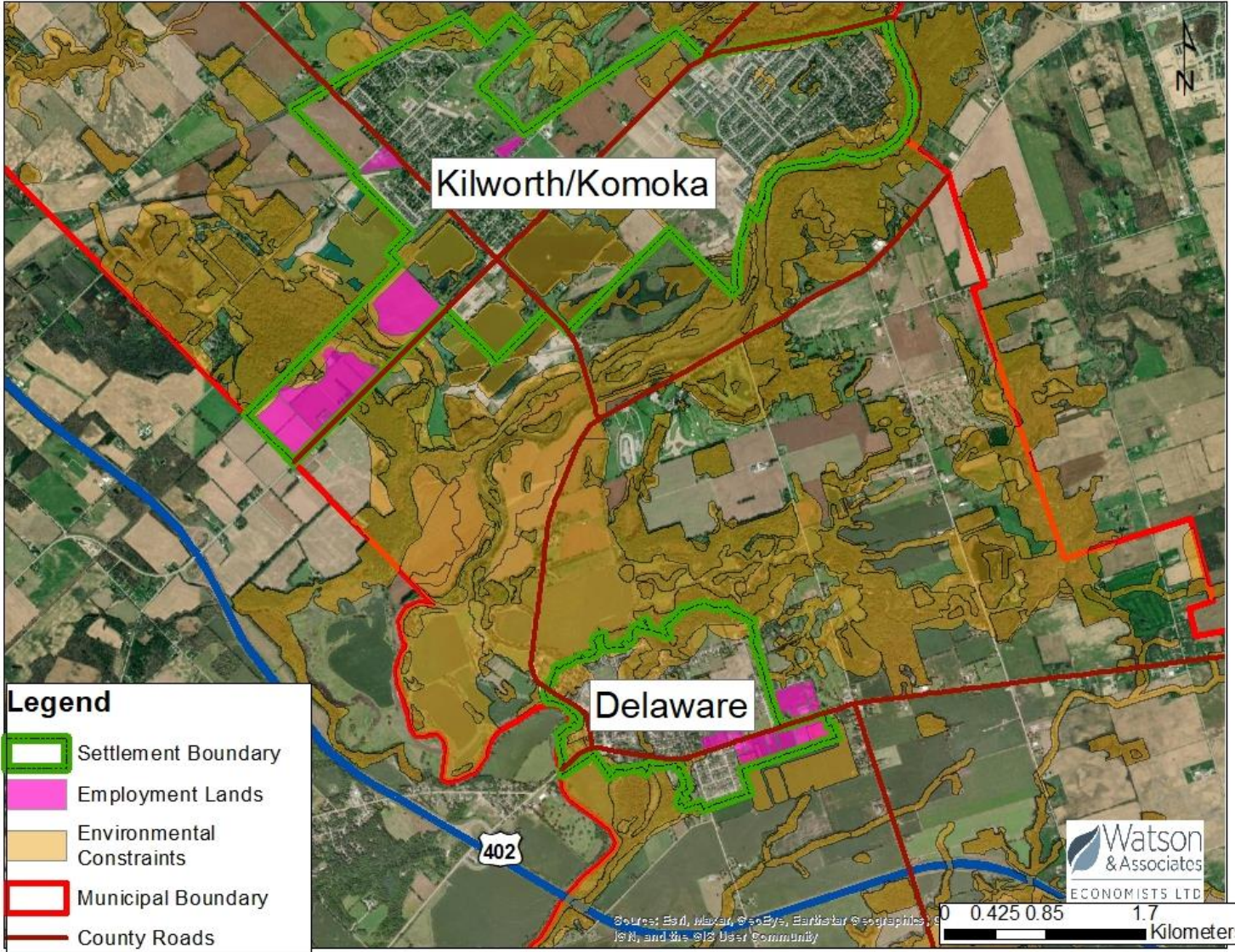
---

July 12, 2021

# Middlesex Centre Employment Land Needs, 2046



Gross Land Area Deficit of 152 Hectares



# Planning for the New Middlesex Centre Employment Area

# Planning for the Future

## Key Themes for Employment Areas

- Consolidation and Blurring of Uses: Integrated Use Campuses and Buildings

### Planning Implications:

- Need for development options which provide for large prestige employment sites with future expansion potential
- Demand for office space within industrial buildings increase employment density
- Accessory commercial uses



*Honda Canada, Markham Ontario*



*Blum Canada, Mississauga*

Supplier of furniture hinges, runners and lift systems.

*Retail showroom to demonstrate products.*

*Office, warehouse (high ceilings, 80 ft'), retail showroom*

# Planning for the Future

## Key Themes for Employment Areas

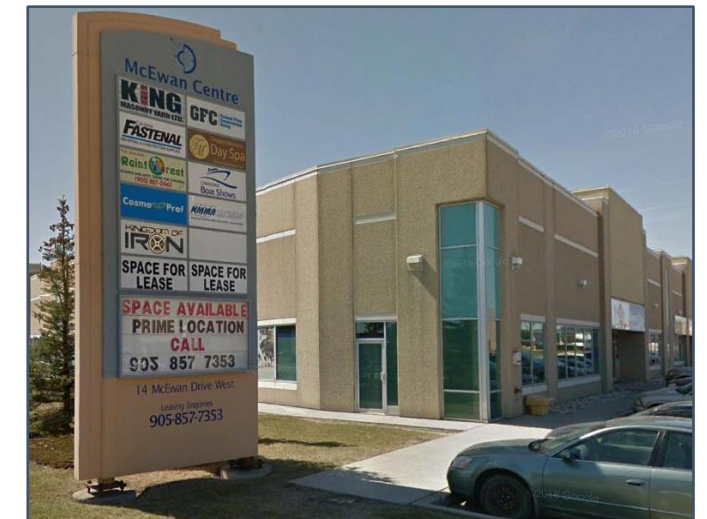
- Market Choice and Opportunities for Employment Supportive Uses

### Planning Implications:

- Adaptive planning and design which support a diversity of small, medium and large-scale business growth, including flex-space and multi-tenant industrial uses
- Unencumbered access to all sites, highway visibility primarily for office uses
- Need to identify the right balance of permitted commercial uses, particularly non-retail, non-commercial uses.
- Restriction of major retail uses
- Employment Area supportive uses typically located at gateway locations and along arterial roads



Flex-Office/Industrial, Hanlon Creek, Guelph



Multi-Tenant McEwan Centre, Bolton

# Planning for the Future

## Key Themes for Employment Areas

- Attracting Innovation and Creative Industries

### Planning Implications:

- Building a theme around an established cluster, existing or potential anchor
- Competitive industrial real-estate market requires coordination with County to enhance the regional profile of the broader area
- Employment supportive uses which limit trips by automobile and improve pedestrian accessibility
- Incubator facilities
- Synergies with research facilities and post-secondary institutions
- Linking labour force attraction with housing affordability



Bromont Science Park, Bromont, QC  
*Microelectronics, Aerospace and Advanced Manufacturing*



Oro-Station Innovation Automotive Park,  
Oro-Medonte (Simcoe County)  
*Automotive engineering, field testing,  
education, and manufacturing businesses*



# Planning for the Future

## Key Themes for Employment Areas

- Best Practices Towards “Greener” Employment

Walmart Fresh Food Distribution Centre, Calgary, AB  
*60% more energy-efficient than the company's traditional refrigerated centres*



### Planning Implications:

- “Green standards” and/or policies which sustainably integrate business park design and site planning with the natural environment
- Development standards which require adaptive development practices which target environmental monitoring to pre-construction conditions
- Supporting and incentivising infrastructure development practices that minimize resource use and support conservation as well as renewable energy sources
- Explore and support green building design principles and energy efficiency



Hanlon Creek Business Park, Guelph  
*Environmental reserve, 9% of land area used for Innovative stormwater management design and environmental monitoring.*

# Planning for the Future

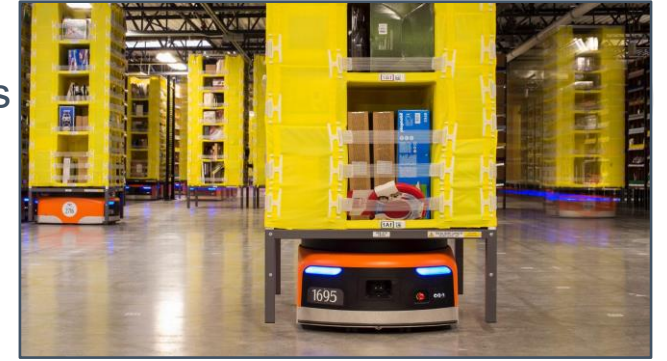
## Key Themes for Employment Areas

- Evolving Goods Movement Sector

### Planning Implications:

- Reduced demand for retail square footage, in particular retail space for goods-based retailers, increased demand for fulfillment centres
- Office uses add increase employment density and add prestige image
- Automated warehouse reduce employment opportunity
- Last mile delivery may involve drawing customer traffic to area

Automated Warehouses



NTN Head Office and Warehouse, Mississauga



Ikea Customer Pick-up Warehouse, Toronto  
*Reduces cost of last mile delivery.*

# Middlesex Centre Proposed Employment Area Target Sectors

# Target Sector Requirements



Employment Sector/Land Use	Location	Parcel Sizes	Transportation	Labour Force	Surrounding Context	Development Characteristics
Manufacturing / Advanced Manufacturing	General or prestige setting	1 to 4 ha and greater	<ul style="list-style-type: none"> <li>• Access to 400 series/controlled access highways</li> <li>• Proximity to markets and related industries</li> </ul>	Access to skilled and unskilled labour	<ul style="list-style-type: none"> <li>• Expansion potential</li> <li>• Buffers from surrounding non-industrial uses.</li> <li>• Emphasis on integrated operations (logistics and office), landscaping and enclosed storage</li> </ul>	<ul style="list-style-type: none"> <li>• Low to high design quality</li> <li>• 10,000 to 250,000 sq.ft.</li> <li>• High building coverage and on-site employment density</li> <li>• Range of building types, including small, large single-tenant and multi-tenant buildings</li> <li>• Loading/unloading areas</li> </ul>
Distribution and Logistics	General or prestige setting	5 to 20 ha  Flexibility in parcel configuration to accommodate large-scale users	<ul style="list-style-type: none"> <li>• Access to 400 series/controlled access Hwy</li> <li>• Excellent access/traffic circulation for heavy truck traffic ; Truck access, loading/unloading requirements</li> <li>• Proximity to markets, customer base and related industries</li> </ul>	Mobile labour force	<ul style="list-style-type: none"> <li>• Need for open storage or enclosed vertical storage</li> <li>• Compatible surrounding land uses/ buffers from surrounding non-industrial uses</li> <li>• Access to on-site and proximity to off-site services</li> <li>• Expansion potential</li> </ul>	<ul style="list-style-type: none"> <li>• Low to moderate design quality</li> <li>• 10,000-1,000,000 sq. ft.</li> <li>• Ceiling height - 30 ft.+</li> <li>• Large parcels with flat topography</li> <li>• Low to high building coverage and low on-site employment density</li> <li>• Loading/unloading areas</li> </ul>

# Target Sector Requirements



Employment Sector/Land Use	Location Criteria	Parcel Sizes	Transportation	Labour Force	Surrounding Context	Development Characteristics
Professional, Scientific, and Technical Services/Business Services	Prestige Industrial or Business Parks	Type of buildings: flexible leasing structures and market choice (multi-tenant vs. free standing office, Class A vs. B office space)	<ul style="list-style-type: none"> <li>Proximity to transit or within walkable environments</li> </ul>	Access to skilled labour force	<ul style="list-style-type: none"> <li>Access to on-site amenities and proximity to off-site services</li> <li>Prestige setting</li> </ul>	<ul style="list-style-type: none"> <li>Low to high design quality</li> <li>2,000 to 10,000 sq.ft.</li> <li>&lt;1 to 2 ha lots</li> <li>Storefront entrance for general public</li> <li>High building coverage and on-site employment density</li> <li>Small multi-tenant and flex office space</li> <li>Street lighting</li> </ul>
Research and Development/"Knowledge-based" Sectors	Prestige Industrial or Business Parks	1 to 2 ha  For stand-alone building or facility	<ul style="list-style-type: none"> <li>Proximity to transit or within walkable environments</li> </ul>	Access to skilled labour force	<ul style="list-style-type: none"> <li>Proximity to related industry cluster (companies and public institutions)</li> <li>Prestige "campus-like" setting</li> <li>Access to on-site amenities and proximity to off-site services</li> </ul>	<ul style="list-style-type: none"> <li>Low to high design quality</li> <li>2,000 to 10,000 sq.ft.</li> <li>1-2 ha lots</li> <li>High building coverage and on-site employment density</li> <li>Space for manufacturing / research as well as multi-tenant or flex office space</li> </ul>

# Target Sector Requirements



Employment Sector/Land Use	Location Requirements	Parcel Sizes	Transportation	Labour Force	Surrounding Context	Development Characteristics
Agri- Business	General or Light Industrial Setting	1 to 4 ha and greater	<ul style="list-style-type: none"> <li>• Access to highways and multi modal facilities</li> <li>• Access to warehousing, markets and distribution centers</li> </ul>	Access to both skilled and semi-skilled labour force	<ul style="list-style-type: none"> <li>• Access to upstream &amp; downstream industries</li> <li>• Storage space for material and equipment</li> <li>• Loading / unloading requirements</li> </ul>	<ul style="list-style-type: none"> <li>• Low to high design quality</li> <li>• High building coverage and on-site employment density</li> <li>• Range of building types, including small, large single-tenant and multi-tenant buildings</li> <li>• Loading/unloading areas</li> </ul>
Food and Accommodation Services / and other Employment Supportive Uses	Prestige Industrial or General Industrial	1 to 5 ha lots	<ul style="list-style-type: none"> <li>• High traffic exposure from major road and surrounding employment and commercial uses</li> </ul>	Access to skilled and semi-skilled labour force	<ul style="list-style-type: none"> <li>• Prestige and general industrial setting</li> <li>• Surrounding a large employment base</li> <li>• Clustering of retail uses in a retail court or at high traffic areas (e.g. major intersections, gateway entrances to Employment Area)</li> </ul>	<ul style="list-style-type: none"> <li>• High design quality</li> <li>• 2,000 (fast food restaurant) to 50,000 sq.ft. (hotel/convention centre)</li> <li>• Commercial floor space per acre ratio of 200 to 400 sq.ft. of retail/service space per acre of developed Employment Area</li> <li>• High building coverage and on-site employment density</li> <li>• Street lighting</li> </ul>

# Select Employment Sector Opportunities for Middlesex Centre



## Agricultural and food processing

- Access to agricultural land and market
- Proximity to storage / warehousing
- Access and transportation (Hwy 402 and 401)
- Proximity to other employment areas
- Proximity to downstream industries
- Competitive land prices

## Manufacturing / Advanced Manufacturing

- Access to ample labour force
- Proximity to storage / warehousing
- Access and transportation (Hwy 402 and 401)
- Proximity to other employment areas
- Compatible land uses
- Competitive prices and availability of space

## Logistics & Distribution

- Access to agricultural areas, manufacturing industrial base and market
- Access and potential for intermodal transportation
- Availability of land
- Varied / flexible parcel sizes
- Competitive prices
- Compatible surrounding uses

## Tech and Light Industrial

- Access to skilled and unskilled labour force presence of post secondary institutions in surrounding areas
- Access and transportation
- Proximity to other employment areas
- Compatible land uses
- Competitive prices and availability of space

# Conclusions



# Conclusions



- The Municipality will require approximately 150 hectares of new employment land to accommodate forecast demand to 2046;
- Proposed Employment Area Site 1 is the preferred location to accommodate future employment growth in Middlesex Centre;
- A broad range of target sectors have been identified for the Municipality, with a focus on advanced manufacturing and distribution and logistics which can leverage the exposure and access to Highway 402; and
- The proposed Employment Configuration can accommodate a mix of larger parcel sizes which can accommodate business operations identified within the target sectors.