LETHBRIDGE COUNTY





INDUSTRIAL-COMMERCIAL LAND USE STRATEGY

2023 UPDATE

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Prepared for Lethbridge County by

OLDMAN RIVER REGIONAL SERVICES COMMISSION

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LETHBRIDGE COUNTY
INDUSTRIAL-COMMERCIAL LAND USE STRATEGY

EXECUTIVE SUMMARY

The following is an overview and summary of some of the main study findings and highlighted strategies identified in the report, provided for convenience and a quick synopsis. For a more comprehensive and complete understanding of the present Lethbridge County land use conditions and the suggested industrial-commercial growth strategies, it is recommended the report be read and reviewed in its entirety.



- The main purpose of the strategy is to identify and protect suitable land areas within the municipality that may appropriately be planned to accommodate industrial or commercial development, without unduly affecting other existing uses or conflict with other County policies or goals.
- The primary vision is to create a planning policy framework that will properly plan for and guide the growth of business development in Lethbridge County to help support the creation of a stable, healthy local economy, based on the principles of sustainable, managed growth.
- In reviewing economic conditions, the County has been holding steady on the average portion of assessment contributed to non-residential assessment over the past decade. After experiencing a significant decline in 2019, the portion of non-residential assessment has steadily increased each subsequent year since.
- In comparing Lethbridge County's provincial equalized assessment compares to other southern Alberta rural municipalities, many have a larger non-residential assessment than Lethbridge County. The County has a higher non-residential assessment than the closer rural municipalities of the County of Newell, MD of Taber and MD of Willow Creek, most of these have a much higher linear property assessment, along with a higher value for machinery and equipment.
- Lethbridge County does not experience the benefits of having a large 'linear property' or 'machinery and equipment' component to its equalized property assessment base, which helps many other rural municipalities off-set for having a lower non-residential assessment component.
- The majority of existing industrial-commercial activity is concentrated in the southern portion of the County and has primarily established along main transportation corridors (both highways and rail lines), in close proximity to the urban centres, and in or in close proximity to the established and designated industrial parks.
- The amount of light-industrial/commercial type land use (e.g. shop buildings, trade contractors, equipment service and sales) has traditionally been somewhat higher than industrial processing/ manufacturing uses and this trend will likely continue into the foreseeable future.

- On average, 32.4 industrial/commercial development permits were approved and issued each year during the 2013–2021 study period. This is an increase from the average of 16.7 industrial/commercial development permits between 2000 and 2012. On average commercial/industrial permits represent 16.9 percent of the development permits issued each year. This is higher than what was previously noted for the 2000-2012 timeframe, where these types of permits represented 12.2 percent of the annual total number of permits issued.
- Based on the analysis it appears the average use occupies 5.0 acres, but the range varies widely, with half being 3.0 acres or less. Applying the range of sizes to the permits and averaging the total yields is a simplistic approach, however, using this method the County may expect 55 - 65 acres of land consumption, on average, for industrial and commercial uses per year.
- The 55 - 65 acres figure comprises both isolated uses and the uses that established in the designated industrial parks. Thus, in examining the data and separating the percentages of isolated development (49%) and designated/grouped development (51%), it would be anticipated that 25 - 30 acres per year may be developed within designated industrial business park areas based on past data trends. However, depending on land availability or lack-thereof in business parks, the amount occurring in the parks may actually decrease in the future.
- Slightly more land than what is typically developed in a year should be available to prospective business interests, as it takes time to plan for, obtain necessary approvals, subdivide and service land and it cannot be brought to market in a short time frame. A two - three year land acreage inventory may be considered reasonable.
- The County should recognize that if there is not available an overall minimum of 55 - 65 acres of readily accessible land amongst the various business parks to accommodate the expected development trends, additional isolated land parcels will likely be needed to provide the land base required to support the same annual level of non-residential development.
- The long-term planning for available land should consider a strategy of situating it in a number of locations rather than one location only, to assist with market choices and locational factors.
- The areas identified for future industrial-commercial growth as types of grouped or clustered land use developments consist of primarily expansions to existing industrial business parks, along with some new areas which are in close proximity to the existing parks (refer to section 5.6).
- As the County does not have its own water treatment facility, the growth of industrial or commercial land use is somewhat dependent on the County obtaining and delivering water, entering into agreements for treatment of the County's water (under its own license), or planning for uses which require limited water supply. It is recognized that overall, any growth area(s) identified will require a water delivery strategy or will be restricted to accommodating low volume water users only.
- Due to likely continued business interest in the Highway 3 Lethbridge-Coaldale Corridor and Broxburn area for development and to take advantage of existing transportation systems and synergy opportunities, the long-term protection and planning of lands identified for potential future industrial-commercial growth should be regarded and the Highway 3 Corridor area should remain a 'priority' growth area for Lethbridge County and not compromised.
- The south Highway 4 Corridor and Wilson Siding area is considered a "priority" growth area due to the area transportation networks, including highway and rail-line, and growing interest in the area with existing and expanding businesses. In particular, access to the rail transportation network and the possibility of spur-trackage is a significant benefit.

- The growth areas identified should not be converted to other incompatible land uses, such as grouped country residential, and an attempt should be made to keep them as unfragmented as possible.
- As nearly all potential land identified as preferable for clustered/grouped type industrial-commercial development is privately held, there is the reality that the development of such new land could become stagnant if the private sector does not participate in the development process. Thus, the County will need to observe the situation over time and may need to consider and adjust the long-term approach accordingly to support continued non-residential growth.
- In 2021, the County adopted a joint business park plan in partnership with the Town of Coalhurst. The County should continue to pursue these types of collaborative opportunities in the future.
- The County should actively approach and engage on an on-going basis those private landowners whose land is identified as a preferred growth area, to gauge interest in developing the land, selling the land, or ascertain long-term interest in using the land, and assist with the process as much as it can.
- Presently, the County is limited in the ability to provide water or sanitary sewer service to businesses. However, if these circumstances were to ever change in the future, any identified areas which may benefit from or be recipients of future water or sanitary sewer service should then be protected and reserved at that time for those types of industrial-commercial businesses that require larger volumes of water for processing.
- Prior to land development occurring, additional planning exercises will need to be done for the undeveloped lands identified as growth areas. This would include the preparation and adoption of area structure plans, which typically will include servicing information, engineering evaluation on soils, storm water management engineering, and a transportation access management strategy. Additionally, the provision of adequate water services will need to be considered in the overall planning.
- This report has identified over 2,900 acres of preferred clustered growth land areas for industrial-commercial lands. If approximately 25-30 acres a year on average of industrial-commercial land was developed in business parks, the growth areas identified should provide for a 100-to-120-year land supply. If more new development occurs on isolated parcels outside business parks, then this time frame will be extended out further.
- It is expected that the development of isolated parcels of land (i.e., outside business parks) for industrial-commercial land will increase over time, due to the current challenges in providing services (particularly water) to business parks, a need for larger parcels of land to accommodate certain types of business, the low stock and availability of vacant parcels in existing business parks, and the economic objectives of the County to grow and expand the non-residential assessment base.

LETHBRIDGE COUNTY
INDUSTRIAL-COMMERCIAL LAND USE STRATEGY

PART ONE | Overview

1.0 Introduction

This *Industrial-Commercial Land Use Strategy* report is to identify issues and opportunities for the development of industrial-commercial lands in Lethbridge County and present solutions or strategies that will help provide for those economic opportunities while respecting the principles of managed growth.

1.1 Background

Over the last decade the County has experienced increased interest and pressure to accommodate non-agricultural (i.e., industrial and commercial) land use activities on parcels of land within the municipality, particularly in proximity to transportation (highway and rail) corridors and urban areas. There has also been an expansion in the local economy relating to the agricultural/food/chemical processing industries and source-point manufacturing/processing with larger and multi-national businesses. New technologies in the alternative energy (such as biofuels, waste to energy) sectors have also created interest in the establishment of these industries within the municipality. With Lethbridge County being situated in the heart of the irrigation zone of southern Alberta, this presents both opportunities and challenges on parcels of land.

In addition to these external economic forces, Lethbridge County also has an interest and desire to expand its non-agricultural tax base. An objective in the current MDP is to *"support commercial and industrial development that will diversify employment opportunities within the County. Further intentions are to provide a positive environment for development, encourage development in suitable locations and mitigate potentially negative impacts to local residents and the environment."* The MDP also states that the *"County shall direct the location of industrial development towards established industrial parks provided that adequate infrastructure servicing is available."*

In addition to these external economic forces, Lethbridge County also has an interest and desire to maintain and expand its non-agricultural tax base. An objective in the current MDP is to *"plan for and pursue a strategy of growth in the industrial/commercial sector to help provide the County a more balanced, diversified, and healthier tax base, and particularly encourage growth of value-added processing in the region."*

An issue for the County is the ability or constraints present in providing adequate potable water and sewage treatment for higher intensity types of developments. The County has recognized that although industrial and commercial growth for the municipality is desirable, it wants to proceed in consideration of good land use planning practices and principles of managed growth.

1.2 Purpose and Intent

The purpose of this strategy report is to identify a long-term vision and policy framework for Lethbridge County, to provide new opportunities for the diversification of the industrial – commercial sector in the County. The intent of the strategy is to guide future planning decisions and policy development related to business development and the creation of a stable, healthy local economy. Ultimately, a main purpose of the strategy is to identify and protect suitable land areas within the municipality that may appropriately be planned to accommodate industrial or commercial development, without unduly affecting other existing uses or conflict with other County policies or goals.

The identified strategies are meant to assist the County in making decisions on land use and guide non-residential type development to appropriate and desirable areas based on rationale planning policies and Lethbridge County strategic growth objectives.

Terms of Reference were created to guide the development of the report and strategy framework.

1.3 Report Context

The compilation of the *Industrial-Commercial Land Use Strategy* study has been based on a thorough review of the existing and past Municipal Development Plans (MDP), Land Use Bylaws (LUB), Area Structure Plans (ASP), land use studies, strategic plans, the County's Sustainable Community Resource plan, and previous General Municipal Plans (GMP). It also involved reviewing transportation studies, economic studies and reports, Stats Canada data, industrial/commercial land use siting planning standards, and historic documents. It has been prepared in consideration of the Municipal Government Act (MGA), the Alberta Land Stewardship Act (ALSA) and involved communication and input from municipal administration, government agencies (e.g., Alberta Transportation) and some County industry players. The South Saskatchewan Regional Plan (SSRP) also requires a municipal council to consider the Strategic Plan and Implementation Plan in the SSRP when carrying out any function in respect of council's powers, duties and responsibilities. Thus, the SSRP has been carefully considered as part of the overall growth strategy.

As a main goal of the strategy is to identify and map suitable land use locations/nodes to accommodate future industrial and commercial development within Lethbridge County, it is recognized that servicing constraints may ultimately direct where and what types of industries may establish.

1.4 Strategy Plan Vision

The primary vision of the strategy report is to create a planning policy framework that will properly plan for and guide the growth of business development in Lethbridge County to help support the creation of a stable, healthy local economy, based on the principles of sustainable, managed growth.

1.5 Strategy Plan Goals

1. To recognize and promote the importance of industry (business sector) to Lethbridge County.

2. To recognize that Lethbridge County as a rural municipality, has the right to non-agricultural and non-residential land use development, and may create policy to support such uses.

3. To provide a framework which will facilitate a viable and feasible business sector in the County by addressing land use and locational opportunities and constraints.

4. To promote well planned, managed growth when supporting and encouraging the establishment of industrial business parks or centres, while also allowing for the opportunity for businesses to establish on isolated parcels deemed appropriate in relation to the proposed use.

5. To promote a strategy and framework for Lethbridge County to provide additional opportunities for industrial-commercial land use development and attract new business ventures to the County.

6. To encourage and enable local employment opportunities by expanding and diversifying the local economy and allowing new businesses to establish and succeed.

7. To provide flexible and realistic policy framework to enable a successful implementation of the planning strategies.

8. To support where suitable the planning for industrial-commercial land use with consideration for the planning principles of nodal or clustered type development, mixed land use, and sustainable planning practices, while allowing for flexibility in considering opportunities for appropriate isolated development.

9. To provide for a range of industrial-commercial land use options based on selected land use siting criteria, industry needs, servicing availability, and locational factors.

10. To allow additional opportunities to assist with diversifying the County's tax base and enabling a stronger, healthier local economy.

11. To recognize the importance of protecting good agricultural land while also allowing opportunities to enhance, expand, and diversify the agriculture industry itself.

12. To promote and enable value added agricultural processing to expand and establish within a rural area by creating additional opportunities for businesses and plants to set-up operations within the County closer to the material source.

13. To provide businesses and developers with tangible options, realistic land possibilities, and clear policy directions when looking to locate or expand a business in the County.

14. To review County plans, policies, and regulations to provide for the recommendations of this report to be implemented.

15. To undertake the planning strategies in a manner that considers and protects the Provincial Highway Network as a safe and efficient transportation corridor.

PART TWO | Economic Analysis

2.0 Economic Review

Alberta's economy has consistently been the fastest growing and most stable in the country since 2005, with an exception in the late 2020 to 2021. As a result, it has been experiencing significant population growth and economic expansion. In 2022 Alberta grew by 58,203 residents between the beginning of July and the end of September in 2022, posting a growth rate of 1.28%. While international net migration was the biggest driver of growth, Alberta attracted the most net interprovincial migrants in the country by a large margin, and by 2024 it is expected that Alberta's population will reach five million. Consequently, Lethbridge County will likely also experience positive growth and economic development, albeit at a slower and more stable rate.

At the time this report was originally released, ATB Financial Economics and Research group forecast that real GDP growth for Alberta would be 2.0 percent.[1] They found that livestock prices and a strong agricultural sector would partially offset any negative shocks in the energy sector. These factors should continue to hold true into the future. ATB Financial was of the opinion that non-resource based economies were expected to further benefit from energy cost savings and an accompanying depreciation in the Canadian dollar. It also expected that solid economic growth from the U.S. should also provide a lift to these economies. As this strategy report is updated in 2022 and the global economy has been dealing with the effects of the COVID-19 pandemic, the stability of an agri-business economy should continue to benefit Lethbridge County.

Although the entire province is somewhat impacted by any fluctuations in the energy sector in Alberta, Lethbridge County is fortunate in that its local economy is not heavily dependent on the oil industry directly. The local economy is more diversified and is largely more concentrated on the agriculture sector, food production, and related agri-businesses. These types of businesses may actually see some benefit from energy cost savings and a depreciation in the Canadian dollar. For these reasons, the County needs to continue to move forward in appropriately planning for economic growth. In particular, ensuring there is identified, well-planned, suitably sited commercial/industrial lands, based on the County's principles of managed growth, readily available to potential businesses.

The following section and economic analysis are for the purpose of determining the current context of where Lethbridge County is at and to identify general trends and is not in itself a detailed or complete indicator of overall economic growth and health of the municipality.

[1] Economic Outlook for 2015 Prepared by ATB Financial, Economics and Research, January 5, 2015

2.1 Population

The population in the County increased steadily over the first half of the 30-year period before but began to level off after 2006 as shown in Table 1. Over the past 15 years the population of the County has remained relatively steady, posting a small loss or gain in each census period. It is noted that there were some statistical errors observed in much of Statistics Canada 2011 census data, and the 2011 population may not be entirely accurate.

Population projections as prepared by the ORRSC (based on Statistics Canada 2021 census data) indicate that over the next 25 years, the County's population should remain consistent at around 10,000 residents (figure 1).

TABLE 1

Lethbridge County Population 1991 to 2021

Year	Population	5-Year Rate of Change (%)	Average Change Per Annum (%)
1991	8,442	2.13	0.43
1996	9,290	10.05	2.01
2001	9,930	7.3	1.46
2006	10,302	3.75	0.75
2011	10,061	-2.34	-0.47
2016	10,353	2.90	0.58
2021*	10,120	-2.25	-0.45

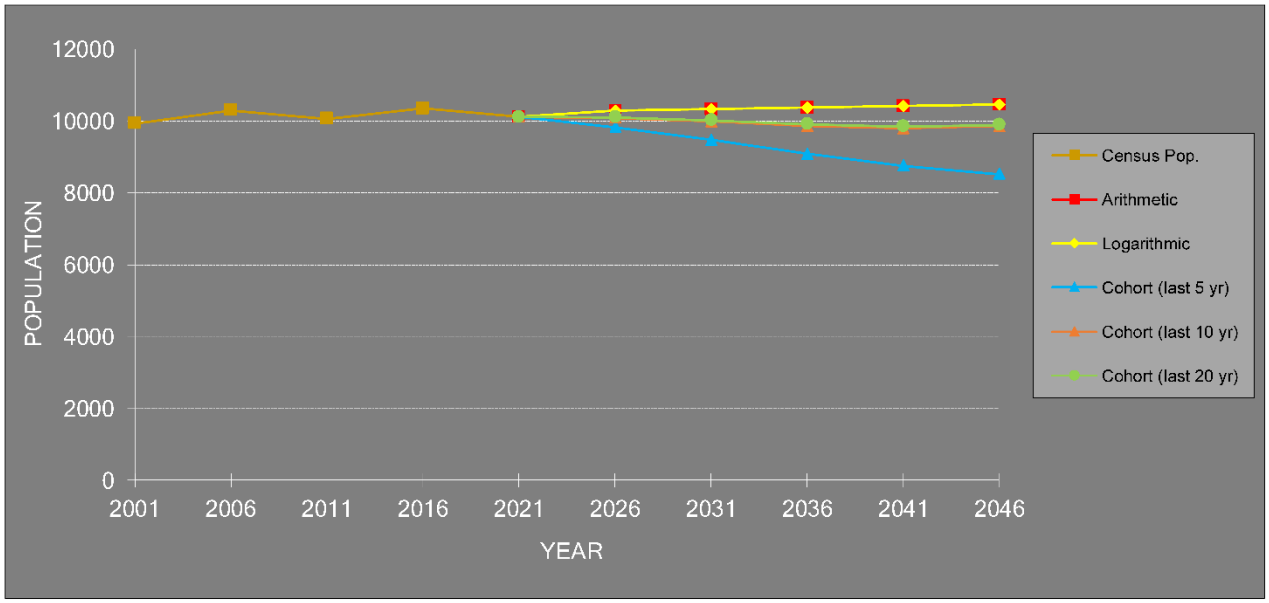
* It is noted that an annexation of land by the Town of Coaldale occurred between the 2016 and 2021 census period which partially accounts for the population decrease reflected in 2021 data.

Population growth itself is not as an important economic health or growth indicator for the County such as it is for urban municipalities. Industry may establish in a rural municipality due to locational factors, source or proximity to resources, transportation linkages, etc., and people employed in these industries may reside in the rural municipality, but they also often reside in neighbouring urban centres and commute for employment purposes.

Figure 1

Lethbridge County Population Projections to 2046

Year	Census Pop.	Arithmetic	Logarithmic	Cohort (last 5 yr)	Cohort (last 10 yr)	Cohort (last 20 yr)
2001	9930					
2006	10302					
2011	10061					
2016	10353					
2021	10120	10120	10120	10120	10120	10120
2026		10283	10283	9832	10088	10102
2031		10326	10327	9479	9989	10022
2036		10369	10372	9089	9859	9909
2041		10412	10416	8753	9798	9851
2046		10455	10461	8526	9858	9891



(Prepared by ORRSC based on Statistics Canada 2021 Census data)

2.2 Labour Force

Labour force statistics indicate the changing nature of Lethbridge County and employment as it relates to economic activity. For example, in 2001, 37.7 percent of the labour force was engaged in agriculture. The 2011 census indicated that number fell to just under 28 percent, while the 2021 numbers show a trend reversal with the percentage climbing to over 32 percent. Table 2 indicates the sectors of the economy and the employment in each.

A review of the labour force by industry division illustrates that the overall percentage of labour engaged in agriculture rose over 4 percent from 2011. The labour statistics for the County's agricultural economy convey a trend opposite to its economy as a whole: while the total workforce in Lethbridge County has shrunk since 2011, the County's agricultural sector has expanded by more than 100 workers. This gain amounts to an increase of more than 8 percent over the 10-year review period. The outlook is similarly positive for the County's transportation, warehousing and utility industries. Collectively, these industries posted an impressive gain in the number of workers since 2011 of more than 52 percent—a testament to

the elevated role of logistics in the global economy over the past decade. As of 2021, close to 7 percent of the County's workforce are employed in these industries. In comparison, labour in the mining, quarrying, oil and gas sectors decreased by almost 27% since 2011, the likely culprit being a prolonged period of depressed oil prices leading up to the COVID-19 pandemic. Both the construction as well as the finance and insurance fields remained somewhat level over the 10-year period and did not experience significant growth as far as overall labour force activity.

TABLE 2

Lethbridge County Labour Force By Industry Division 2011 and 2021

Labour Force by Industry Division	2011	% of total	2021	% of total
Agriculture	1,370	27.96%	1,480	32.17%
Mining, quarrying, oil & gas	75	1.53%	55	1.20%
Manufacturing	340	6.94%	225	4.89%
Construction	450	9.18%	465	10.11%
Transportation, warehousing & Utilities	210	4.29%	320	6.96%
Retail and Wholesale	485	9.90%	385	8.37%
Finance & Insurance	115	2.35%	120	2.61%
Business, professional, technical, educational, & Community Services	1,690	34.49%	1,410	30.65%
Public Administration	165	3.35%	140	3.04%
Total All Industries	**4,900**	**100.00%**	**4,600**	**100.00%**

Source: Statistics Canada 2011 and 2021 Census (numbers may not add up due to rounding)

2.3 Assessment Base

In Alberta, equalized assessment is the means of comparing property wealth in a uniform manner for all municipalities. Alberta uses an ad valorem assessment and tax system where property taxes are based on wealth and wealth is measured by the value of property expressed as an assessment.

The Annual Equalized Assessment Report prepared by Alberta Municipal Affairs breaks property down into five major categories:

- residential
- farmland,
- non-residential (which includes the commercial and industrial),
- linear, and
- machinery and equipment.

Prior to 2020, the provincial framework listed railway as a sixth category of property. In 2020 and subsequent years, railway is a sub-category of the linear category along with telecommunications, electric power generation, power systems, pipeline, wells, cable and gas distribution system.

As noted, commercial and industrial uses are classified as non-residential property assessment as defined in section 297(4)(b) of the Municipal Government Act as:

> *"linear property, components of manufacturing or processing facilities that are used for the cogeneration of power or other property on which industry, commerce or another use takes place or is permitted to take place under a land use bylaw passed by a council, but does not include farm land or land that is used or intended to be used for permanent living accommodations."*

Table 3 illustrates the breakdown of equalized property assessment for Lethbridge County between 2014 and 2023 (for the official provincial reporting year as prepared the previous fall). During this period, non-residential assessment has climbed slightly from 20.7 percent to 21.9 percent of the total assessment levied each year. Previously, between 2002 and 2014, non-residential assessment had remained fairly constant at 20.7 percent of the total assessment.

TABLE 3

Lethbridge County Equalized Assessment 2014 to 2018 (report years)

Type of Assessment	2014	2015	2016	2017	2018
Residential	873,122,024	887,340,738	938,510,371	988,167,418	1,020,248,721
Farmland	156,314,990	156,595,230	157,272,550	157,291,180	157,546,390
Non-residential	**358,363,026**	**379,308,827**	**398,427,641**	**442,727,267**	**448,540,349**
Linear	201,980,040	239,109,040	240,647,420	225,840,110	201,357,120
Machinery & Equipment	136,934,120	133,009,410	134,636,480	127,291,660	125,897,650
Railway	5,699,570	5,746,280	5,979,880	6,306,910	6,260,170
TOTAL	**1,732,413,770**	**1,801,109,525**	**1,875,474,342**	**1,947,624,545**	**1,959,850,400**

Lethbridge County Equalized Assessment 2019 to 2023 (report years)

Type of Assessment	2019	2020	2021	2022	2023
Residential	1,012,295,469	1,046,386,188	1,079,684,285	1,133,421,872	1,193,711,116
Farmland	156,698,250	156,630,700	157,030,570	157,438,360	157,835,060
Non-residential	**403,368,355**	**409,085,266**	**416,111,003**	**433,639,029**	**469,182,787**
Linear	198,705,870	219,764,860	203,401,240	204,709,060	203,523,140
Machinery & Equipment	121,056,680	118,116,740	115,100,870	112,667,890	114,982,920
Railway	6,400,330	–	–	–	–
TOTAL	**1,898,524,954**	**1,949,983,754**	**1,971,327,968**	**2,041,876,211**	**2,139,235,023**

Table 4 illustrates how Lethbridge County's provincial equalized assessment compares to other various rural municipalities in Alberta for 2023. More populated rural areas, and those in close proximity to larger urban centres and major transportation routes, such as Red Deer County and Rocky View County, obviously have a much higher non-residential component to their equalized property assessment. Cypress County and Wheatland County also have a larger non-residential assessment than Lethbridge County, as they both likely benefit from being in proximity to major urban cities and have the Trans-Canada Highway traverse through their boundaries.

TABLE 4

Provincial 2023 Equalized Assessment – Rural Municipal Comparison

Municipality	Residential	Farmland	Non-residential	NR Linear Property	Machinery & Equipment	Grand Total
Cypress Co.	1,388,818,537	146,539,110	**630,689,503**	1,796,224,090	854,102,830	4,816,374,070
Newell Co.	809,044,934	145,308,660	**392,400,716**	1,995,385,890	563,854,110	3,905,994,310
Red Deer Co.	3,690,019,605	162,169,260	**1,457,652,240**	806,757,610	236,376,130	6,352,974,845
Rocky View Co.	13,960,035,502	151,428,740	**3,903,388,315**	1,186,056,440	641,726,350	19,842,635,347
Taber, MD	713,032,128	178,771,400	**252,662,662**	656,448,530	260,160,490	2,061,075,210
Wheatland Co.	1,240,783,084	199,840,080	**582,191,586**	1,258,563,940	703,532,670	3,984,911,360
Willow Cr. MD	728,363,802	143,535,240	**85,542,995**	706,287,020	59,517,790	1,723,246,847
Lethbridge Co.	**1,193,711,116**	**157,835,060**	**469,182,787**	**203,523,140**	**114,982,920**	**2,139,235,023**

The comparison table illustrates that Lethbridge County does have a higher non-residential assessment than the closer rural municipalities of the County of Newell, MD of Taber and MD of Willow Creek. However, it is of interest to note that all three of these have a much higher linear property assessment, and with the exception of the MD of Willow Creek, a higher value for machinery and equipment also.

2.4 Economic Summary

The previously presented population and economic data is provided to identify overall trends and to gauge how activity and the local economy has changed over the defined study analysis period. This brief review of the economy of the County indicates a diversification of the rural area, however, non-residential growth has not significantly increased its share in the overall growth of the County. Agriculture is still the main economic driver of the County; however, agricultural operations can be seen to be getting larger in scales (i.e. less persons employed directly on farms, but farm sizes and operations are increasing in scope, value and in land holdings). To support the fact that agriculture is the main economic engine, an economic impact study prepared for the County in 2014 found that Lethbridge County is the only County in Alberta that generates over $1 billion in gross farm receipts.[2] The report estimated that the County made a contribution of $1.1 billion to the economy for an impact of $415 million on Gross Domestic Product.

Over the last decade, industry sectors such as construction, agri-business, retail, service and professional service have experienced increases in activity. Increases in these sectors may, in part, be due to:

- economic health of the urban areas in the County,
- locational factors,
- slow and stable economy and labour market in southern Alberta,
- spin-off activity from agriculture, and
- the diversification and establishment of new industries/processes, especially those in relation to agriculture and agricultural bi-products.

Likely these trends will continue, and council should consider providing sufficient and suitable areas for supporting the diversity of uses.

The economic overview also highlights the fact the Lethbridge County does not experience the benefits of having a large 'linear property' or 'machinery and equipment' component to its equalized property assessment base, which helps many other rural municipalities off-set for having a lower non-residential assessment component. Planning for and pursuing a strategy of growth in the non-residential sector will help provide the County a more balanced, healthier tax base.

In December 2022 the County Council approved the Commercial and Industrial Municipal Tax Incentive Bylaw (Bylaw 22-008) to help attract and keep existing businesses in Lethbridge County. This study will help form the basis of helping to promote, support, recruit, and steer businesses to developing in the Country, as it will help highlight industrial-commercial trends and identify potential suitable land areas for businesses and land developers.

[2] Economic Impact Study by Markus Weber & Michael Krokosh, Serecon Services Inc.

PART THREE | Legislative Review

3.0 Historical Background

Policy directions and decisions pertaining to the development of industrial and commercial land use have occurred over time and using different legislative parameters. The province had established a system of land use planning that depended on various levels of legislative planning documents adopted by bylaw, legislated up until 1995 through the provincial Planning Act, and after that the Municipal Government Act. Since the mid-1970s, the primary change in direction of provincial legislation has been the continued transfer of decision authority from the regional or provincial bodies to the local level.

Another significant change that affected industrial and commercial land use policies related to municipal finances in the 1990s. Major changes and reductions in the provincial funding of municipalities resulted in both urban and rural municipalities having to rely heavily on their own resources to fund the various services provided and property taxes had to support more of the expenditure. It is understandable that industrial and commercial land development is sought after by municipalities because the tax rate applied is higher, resulting in both urban and rural municipalities competing for industrial and commercial tax revenue.

3.1 Provincial Government Rural Industrial Policy Prior to 1995

In January 1981, the Alberta Planning Board and the Minister of Municipal Affairs issued a rural industrial land use policy. The report entitled*, "Rural Industrial Land Use; Some Policy Guidelines for the 1980s"* outlined what the Provincial Government at the time viewed as suitable criteria for the establishment of industrial development in rural municipalities. In summary, the policy generally suggested:

- rural areas are to take advantage of industrial development,
- industry should be grouped into industrial parks,
- industrial land should be generally unserviced by the rurals,
- rural-oriented and land-extensive industries should be accommodated, and
- development should locate close to established transportation routes.

The effect of this policy was to allow and encourage large lot, unserviced agricultural industry into the rural areas and suggest that all other industries would go into urban areas. This was supported in the Regional Plan up to 1995 and in Lethbridge County bylaws until 1998.

3.2 Regional Plan Rural Industrial Policy

The Oldman River Region: Regional Plan, adopted in 1985, and the 1974 *Preliminary Regional Plan* broadly outlined regional goals and objectives specifically tailored to the needs of the southwest region of the province. The policies contained in the Plan acted as a framework to help guide the physical development of a region. It was the general recommendations from these Regional Plan documents which directed rural and commercial development from before 1985 up to 1995.

The Regional Plan had specific objectives and policies intended to manage rural industrial and commercial development within the region. Prior to the mid-1980s, there was little pressure or demand for industrial or commercial development outside the urban areas of the region. At the time of plan adoption in 1985, consideration to future management strategies were beginning to warrant more attention as the demand for such development was increasing.

Policies that likely had an effect on industrial development in rural municipalities were the policies that outlined criteria for decisions on rural industrial uses. Various criteria outlined what classes of industrial uses may be approved in rural areas which included:

- agriculture-related industries which support agriculture directly in rural areas;
- non-labour intensive industries which required relatively large areas of land, but require minimal on-site improvements, services, and public amenities;
- natural resource extractive uses such as gravel pits which are governed by the location of a natural resource; and
- hazardous, offensive, or noxious industries which cannot co-exist compatibly with other uses in an urban environment.

In the mid-1990s the provincial government undertook major restructuring which included rescinding the Planning Act and planning matters were incorporated into Part 17 of the Municipal Government Act in 1995. The main outcome of these changes was to empower the local municipalities with the authority to wholly decide upon most subdivision and development matters. As a result, industrial and commercial development occurring since 1995 has been guided and directed by individual municipalities and their vision of rural development, or has occurred on a complete ad-hoc basis. Regional planning was reintroduced into Alberta's legislative scheme in 2009 with the proclamation of the Alberta Land Stewardship Act (ALSA). The pertinent ALSA regional plan for Lethbridge County is the South Saskatchewan Regional Plan (SSRP), which was brought into force in 2014. An overview of the SSRP is provided in Section 3.6 of this study.

3.3 Municipal Development Plan

A first General Municipal Plan (GMP) for Lethbridge County was adopted in 1985 and contained policies that reflect provincial policy and were intended to recognize the service center function of urban areas in the County. The plan also promoted clustered rather than strip development, hamlet industrial areas, and locations other than the urban fringe area.

For the most part, these policies appeared to be unsuccessful and in 2000, the County's new Municipal Development Plan (MDP) changed policy to reflect the existing situation. The major changes included:

- broadening the definition of suitable commercial and industrial uses to include most categories including those that would have, in the past, been directed to urban areas;
- suggesting that lands with rail and highway access be promoted for industrial use;
- identifying the portion of Highway 3 between Lethbridge and Coaldale as an area that could accommodate a wide variety of non-residential uses.

These type of policies were further reinforced in the 2010 MDP and also in the 2022 MDP which states the following:

- To plan for an pursue a strategy of growth in the industrial/commercial sector to help provide the County a more balanced, diversified, and healthier tax base, and particularly encourage growth of value-added processing in the region.
- To plan and direct industrial and commercial growth towards business parks provided that adequate infrastructure servicing is available.
- To consider and apply through policy, the recommendations and direction of the County's Industrial-Commercial Land Use Strategy (2016) in decision making.
- To plan for effective, managed growth when supporting and encouraging the establishment and expansion of industrial business parks or centres and provide some locational certainty to businesses locking to located within the municipality.

3.4 Intermunicipal Development Plans

Lethbridge County has completed Intermunicipal Development Plan (IDP) with all the adjacent municipalities as per the Municipal Government Act Section 631. The Intermunicipal Development Plans amongst other things look at the future land uses within the area, the manner of and the proposals for future development in the area and co-ordination of intermunicipal programs relating to the physical, social, and economic development of the area

The IDP's with the adjacent urban municipalities being the City of Lethbridge, Town of Coalhurst, Town of Nobleford, Town of Picture Butte, the Town of Coaldale, all include policies and areas for future growth and specifically industrial/commercial growth within the County. The Plans speak to working collaboratively with the adjacent municipalities on industrial/commercial ventures that have a regional benefit.

The IDP's with the other rural municipalities, being the MD of Willow Creek, Vulcan County, MD of Taber, County of Warner, and Cardston County, do not include growth areas but do acknowledge each municipalities right to have industrial development where deemed compatible with existing land uses.

3.5 Land Use Bylaws

Up until 2001, the County's Land Use Bylaw only generally allowed three opportunities for industrial uses:

- areas could be designated 'rural grouped industrial' for clustered (i.e. grouped) development;
- under the agricultural district, an isolated industrial use may be allowed as a discretionary use; and,
- a 'hamlet industrial district' allowed for higher-density industrial development in hamlets.

Amendments were made to the 2001 Land Use Bylaw to provide for a wider variety of industrial and commercial uses, and this was further expanded in the most recent 2013 bylaw adopted. Land Use Bylaw No. 1404 includes four industrial districts to accommodate various business-industrial type uses and also contains two commercial land use districts.

3.6 Other Municipal Plans

Lethbridge County has a number of other approved municipal documents and plans that reaffirm the goals and objectives of supporting and fostering non-residential development in the County, including the following:

- Over the last number of years County Councils' *Strategic Planning* documents have outlined the need, desire and direction to actively work towards properly planning for and encouraging economic growth.
- The 2009 *Integrated Community Sustainability Plan* for the County stated that economic sustainability is a crucial pillar to all elements of sustainability. The plan indicates that the County views sustainable economic development as a balance between agricultural, industrial and commercial sectors.

  In 2010 the County also partnered with the Town of Coaldale and created an *Integrated Development Strategy* for the Highway 3 corridor to provide a high-level framework to help guide regional economic opportunities for this area, while also properly managing water and drainage issues. This document focuses on recognizing Broxburn Business Park as an industrial-business centre (i.e. industry-commercial business node) for the area while planning within the context of the future Canamex freeway and service interchange that will be constructed in proximity.

Overall, the most recent planning and municipal documents, including the 2010 updated Municipal Development Plan, approved by Council reflect a desire by the County to expand, properly plan for, and enable wider participation/opportunities in commercial and industrial land use development within the municipality.

3.7 South Saskatchewan Regional Plan

The South Saskatchewan Regional Plan (SSRP) came into effect September 1, 2014. The SSRP uses a cumulative effects management approach to set policy direction for municipalities to achieve environmental, economic and social outcomes within the South Saskatchewan Region until 2024. The SSRP requires a municipal council to consider the Strategic Plan and Implementation Plan in the SSRP when carrying out any function in respect of council's powers, duties and responsibilities. Some of the applicable strategies identified in the SSRP that have been considered in this study (as summarized), include that municipalities:

1.1 Maintain an agricultural land base by reducing the conversion and fragmentation of agricultural land;

1. 2 Support a diverse and innovative irrigated agricultural and agri-food sector;

1.3 Assist the agricultural and agri-food industry to maximize opportunities for value-added agricultural products;

5.1 Consider the efficient use of land principles which include, increasing the proportion of new development that takes place within already developed or disturbed lands through infill, redevelopment, shared use; and plan, design and locate new development in a manner that best utilizes existing infrastructure and minimizes the need for new or expanded infrastructure;

8.21 Direct non-agricultural development to areas that will not constrain agricultural activities or to areas of lower quality agricultural lands.

Overall, the strategy of the SSRP that emphasizes land-use decisions are to promote the efficient use of land has been carefully respected as part of the overall growth strategy identified in the report.

PART FOUR | Existing Land Use Analysis

4.0 Review

This analysis is to identify and evaluate the various types of development, specific locational characteristics, and site requirements of existing industrial and commercial developments. By creating a profile of industrial and commercial development, including generating a set of criteria associated with industrial and commercial development, this can be used to help develop a land use strategy to assist in the management and direction of future industrial and commercial expansion to the most appropriate areas of the County.

4.1 Uses Being Reviewed

As this report is to guide the County's municipal land use decision-making process, it will therefore only focus on the industrial and commercial uses that Lethbridge County has decision-making authority over. Both federal and provincial levels of government make decisions on other uses such as:

- the oil and gas industry,
- telecommunication towers and systems,
- railway-lines,
- wind energy systems and solar collector facilities connecting into the electrical transmission grid,
- any Crown controlled use, (i.e. timber harvesting, gravel pits).

The report also recognizes that in the rural agricultural community there is an informal system of uses that support the agricultural land base and activities, but do not have formal development permits for industrial, commercial or home occupation use. A number of factors which reflect development within these sectors have been examined in order to illustrate the development of industrial and/or commercial activity within the County. Uses in this study have been attempted to be identified through the development permit and subdivision files. It is likely other uses may exist in various areas, as the field work sampled identified areas of the County rather than an intensive land use study. It is recognized that some uses also often cannot be seen from the road unless some signage exists. Thus, some gaps in data may occur.

Both industrial and commercial uses are generally dealt-with and analyzed in a related manner as the impacts, such as traffic, noise, aesthetics, etc. are similar for those types of uses.

4.2 Regional Location

Lethbridge County is located in the heart of southern Alberta approximately 80 km (50 miles) from the border with the United States. Occupying 2338.84 km^2 (903.1 sq. miles), the municipality is comprised of diverse landforms, soil types, and land uses. According to the 2021 Census of Population, approximately 10,120 people reside within Lethbridge County and many are not only employed within the rural municipality, but also in the six urban municipalities found within the County's boundaries as well as seven unincorporated urban hamlets.

Excellent provincial highways serve Lethbridge County, and the CANAMEX Corridor, one of the first north-south trade routes designated as a High Priority Corridor under the National Highways Systems Designation Act, includes portions of Highways 3 and 4 and represents a major link between the United States and Canada. As well, Highway 3 is a major east-west traffic route linking the region with the west coast and eastern centres through Medicine Hat where it joins the TransCanada Highway.

Canadian Pacific Railway (CPR) provides active rail service both to and through the region. The main east-west line is located through the southern portion of the County, often in close alignment to Highway 3. As well, rail trackage is available in all four directions so freight can be shipped easily to different markets. A large modern marshalling yard facility, operating at or near capacity in 2015 according to the CPR, is located in the County and is situated a ¼-mile north-west of the Town of Coalhurst adjacent to Highway 3.

4.3 Study Area

For the purpose of analysis, the detailed non-residential development activity data within the entire County was originally collected and examined starting in the year 2013 up to the end of 2021. The data from the original Industrial/Commercial Land Use Strategy completed in 2016 provided a base line of information to compare data. Data was also reviewed from other previous planning studies, dating from 1986 to 1995, which was the time period representing approximately nine years prior to 1995 when rural industrial and commercial policy was provincially directed. Also, a review of data from 1995 to 2000, when the elected officials of Lethbridge County had a greater influence on land use policy and development, was also undertaken.

A primary goal of the analysis was to identify existing patterns of development with regards to the frequency, density and location of industrial and commercial activity, and therefore a review of the following 2013-2021 data was conducted:

- subdivision application approvals which created industrial and commercial lots,
- development permit data pertaining to home occupations approved, and
- development permit approvals for industrial and commercial developments.

The other more specific objectives of the general analysis are:

- to identify the average number of non-residential permits approved on an annual basis;
- to recognize and map trends in location and density in order to build a logical profile of rural industrial and commercial development;
- to identify the average subdivision parcel sizes applied for by developers;
- to use the profile to identify key areas experiencing development pressure;
- to appropriately site and plan for industrial and commercial development within the County in consideration of the areas where businesses most desire to locate, and where the land type and location aligns with broader County policy environments (i.e., Strategic Plan, Municipal Development Plan).

4.4 Subdivision Activity

Subdivision records from the Oldman River Regional Services Commission illustrate that during the study period (2012-2021) Lethbridge County received 331 applications for subdivision from which approximately 34 applications were to create industrial or commercial lots. On average, 3.4 new applications were submitted per year and just over 5.7 new lots created (see Table 5). During this most recent study period, the majority of lots were created for industrial use (56 of the 57 total). The largest number of multi-lot or grouped industrial subdivisions were approved in 2012 (11 of the 57 total), with another 10 new lots in both 2017 and 2019.

TABLE 5

Lethbridge County Subdivision Activity 2012 to 2021

YEAR	Total No. of Applications (all types)	Total No. of Commercial Industrial Applications	No. of Lots Approved By Land Use Type		Total Lots Created
			Commercial	Industrial	Commercial & Industrial
2012	42	7	0	11	11
2013	36	4	0	7	7
2014	27	1	0	0	0
2015	37	4	0	4	4
2016	40	2	0	6	6
2017	35	6	1	9	10
2018	25	2	0	1	1
2019	27	3	0	10	10
2020	31	1	0	1	1
2021	31	4	0	7	7
TOTAL	**331**	**34**	**1**	**56**	**57***

*Note: Some applications and lots were applied for but were not approved or were approved but not registered.

The review of subdivision files also indicates the applied-for size of a lot or lots to be subdivided from a parcel of land. The average median size commercial lot created was 6.58 acres, while the average industrial lot was 5.59 acres in size. Table 6 reveals that nearly 46 percent of the lots created for both commercial and industrial use during the study period were between 1.0 and 2.9 acres in size. Overall, exactly 50 percent of the lots were less than 3.0 acres in size and slightly more than 65 percent of the total lots were less than 5.0 acres in size.

TABLE 6

Lethbridge County Parcel Sizes Approved 2012 to 2021

Parcel Size	Percentage of Total	Combined Percentages
Less than 1 acre	4.17%	50%
1.0 to 2.9 acres	45.83%	
3.0 to 4.9 acres	15.28%	65%
5.0 to 9.9 acres	16.67%	
10.0 to 14.9 acres	6.94%	
15.0 to 19.9 acres	6.94%	
20.0 to 49.9 acres	4.17%	
50 acres or more	0.00%	
TOTAL	**100.00%**	

A mapping exercise was conducted from the subdivision records to illustrate the locations at which non-residential subdivisions have been approved. For purpose of analysis, the scale is such that an entire quarter section is highlighted if a subdivision application or multiple applications have been approved at any location within the quarter-section. The pattern is somewhat scattered; however, the following trends are recognized:

- Most of the subdivisions have been occurring in the southern portion of the County (described as southerly of Highway 519, and primarily south of the Oldman River).
- Subdivision has occurred largely in proximity to the main transportation corridors and also in proximity to urban centres.
- Activity can also be identified at a higher degree between Lethbridge and Coaldale along the Highway 3 corridor, and along Highway 4 towards the southern boundary of the County.
- Similarly, subdivision in quarter-sections that have involved four or more subdivisions have primarily occurred in existing designated grouped industrial park areas and adjacent to the provincial highways.

4.5 Development Permit Applications

Over time, the development permits approved represent a diverse number of uses and the density of uses has also increased as both the County and the urban municipalities in the area have grown and prospered. This would indicate that Lethbridge County appears to be in transition from its traditional role as an agricultural-based municipality to a more diversified, perhaps semi-urban type municipality. Table 7a depicts the number of permits issued between 2000 and 2012 and Table 7b shows the permits issued for the subsequent study period between 2013 and 2021.

Between 2013 and 2021, 1,679 development permits were issued of which 275 were industrial/commercial development permits and 102 were home occupations. On average commercial/industrial permits represent 16 percent of the development permits issued each year. This is higher than what was previously noted for the 2000-2012 timeframe where 12.2 percent of permits issued yearly. Home occupations represent approximately 6 percent of permits issued each year. This number has been relatively consistent over the last two decades.

Maps were created to illustrate the locations at which permits have been applied for and approvals given between 2013 and 2021. As the information on the permits sometimes does not indicate what portion of the quarter-section is being utilized for proposed development, the entire quarter-section was depicted as developed. Where more than one permit has been issued on a parcel or in a smaller area, such as a business park, the number of permits issued has been included on the map. The locational mapping analysis indicates the following trends regarding commercial/industrial developments:

- Commercial and industrial uses are more concentrated along major provincial highways and less so along minor provincial highways.
- The area with most of the development has been along Highway 3 between Lethbridge and Coaldale, with Broxburn Business Park being an area of concentrated growth.
- Home occupations are scattered throughout the municipality but are more likely to be located in the southern portion of the County (i.e. south of Highway 519, south side of Oldman River).
- Industrial uses are more concentrated in industrial cluster areas or designated parks and in proximity to urban centres, such as Broxburn Business Park, Stewart Siding, and Duncan Industrial Park
- Commercial and industrial permit approvals decline in numbers as the distance from the City of Lethbridge increases.
- These trends are similar to what occurred in the 2000 to 2013 study with the area around the City of Lethbridge having more development.

TABLE 7A

Commercial/Industrial and Home Occupation Permits 2000 – 2012

Year	Total Development Permits Approved	Total Business Type Permits (all category types)	Industrial / Commercial* Permits Issued	Home Occupation Permits Issued
2000	159	21	10	11
2001	152	36	20	16
2002	120	30	14	16
2003	126	22	14	8
2004	124	30	12	18
2005	146	27	20	7
2006	154	44	28	16
2007	171	33	18	15
2008	128	26	12	14
2009	142	31	20	11
2010	111	26	18	8
2011	131	17	9	8
2012	115	32	22	10
TOTAL	**1,779**	**375**	**217**	**158**

Source: Lethbridge County Development Records 2000–2012

** Excludes permits issued for non-business uses (e.g., compressor sites) and livestock operations)*

TABLE 7B

Commercial/Industrial and Home Occupation Permits 2013 – 2021

Year	Total Development Permits Approved	Total Business Type Permits (all category types)	Industrial / Commercial* Permits Issued	Home Occupation Permits Issued
2013	168	41	30	11
2014	174	49	36	13
2015	187	37	25	12
2016	193	32	23	9
2017	206	47	34	13
2018	177	34	22	12
2019	179	54	38	16
2020	172	44	34	10
2021	266	60	49	11
TOTAL	**1,779**	**374**	**216**	**158**

Source: Lethbridge County Development Records 2013–2021

** Excludes permits issued for non-business uses (e.g., compressor sites) and livestock operations*

4.6 Land Use Conclusions

Four historical and existing broad land use category types relating to approvals of commercial or industrial activity can be identified from the examination of subdivision and development data. These include:

- isolated industrial and commercial uses,
- home occupations,
- hamlet activity, and
- grouped industrial/commercial areas, including airport industry.

By examining past subdivision activity and the issuance of development permits in relation to the location of industrial and commercial development within Lethbridge County, the following general observations can be made:

- The majority of existing industrial and commercial activity is concentrated in the southern portion of the County.
- Industrial and commercial uses have primarily established along main transportation corridors (both highways and rail lines) that allows for visibility and frontage, as well as availability of pavement and ease of access to trucking routes.
- Industrial and commercial activity adjacent to or in close proximity to the urban centres is of significance, and it is likely that location to market and a source for labour pool may play a role.

- A large portion of industrial activity is situated in or in close proximity to the established and designated industrial parks. Proximity to existing industry may also highlight the importance of linkages to associated industries.
- Other than agricultural related developments, non-residential development in the northern portion of the County is limited and the majority of existing development is concentrated along the rail lines and highways.

It is noted that the siting and locational pattern created by the indicators of industrial and commercial development can only imply activity because:

- The act of subdividing land in itself does not guarantee development activity. For example, a large grouped industrial subdivision may be approved but it often takes time to fully engineer, service and market the land, or the lots can sit vacant waiting for a lot purchaser to build on.
- The issuance of a development permit does not guarantee the construction of a proposed project. Over time (and still a current reality), there has been no comprehensive method of tracking if a business or industry is active or not once the development permit has been issued.

As previously mentioned, other industrial type activities may occur within the County, such as resource-based activities, but these often do not require a municipal development permit or are regulated by other levels of government.

4.7 Existing Land Use Overview

4.7.1 Isolated Industrial and Commercial Development

This type of development is the hardest to examine because more detailed permit information has only been kept over the last decade or so (note: this category does not include home occupations). Overall, it is not precisely known exactly what activity is occurring in what location and how intensely. Prior to Land Use Bylaw No. 1404 (October 2013), these types of uses were primarily located in the 'Rural Agriculture' land use district, and they did not require a rezoning to a separate commercial/industrial zoning. In some situations, the land was redesignated from rural agriculture to rural grouped industrial to facilitate certain types of industry to develop as permitted or discretionary uses, typically in respect of potential impacts to neighbours.

Land Use Bylaw No. 1404 would now require most uses to rezone to one of the appropriate commercial/industrial land use districts. Older developments may have also established prior to municipal permitting requirements or were in operation before better records were kept. These uses are both large and small, and some of the larger uses are agricultural produce processors or handlers that often locate on main transportation routes, either highway or railway or both. Often these uses locate on properties owned by the operator who started the operation.

Isolated uses comprise approximately 49 percent of all industrial and commercial development within Lethbridge County. These uses occur in a scattered pattern throughout the County possibly due to either the access to transportation, closeness to markets or previous ownership of the land on which the industry or commercial business has developed. The number of isolated use development permits has slightly dropped since the 2016 report where more than half of the permits issued were for isolated development.

4.7.2 Home Occupations

The Land Use Bylaw allows for issuance of permits for home occupations which are intended to allow a person to have a small-scale enterprise in the house. In the past, only one other person could be employed in the business and there couldn't be a change in appearance in the dwelling. These controls are more important in the hamlets, while in the rural area the definition between home occupation and an industrial or commercial use is less clear. For example, small trucking operations have been approved as home occupations or industrial uses. Land Use Bylaw No. 1404 was expanded to allow for a wider scope of businesses to operate as home occupations, while also allowing a small number of staff to be employed on site.

It is important to take note of these smaller-scale home based developments, as some are in the business 'incubate' stage and may grow and expand into industrial parks in the County. As Lethbridge County does not require business licenses, there is no up-to-date tracking system that allows the County to determine which uses are still operating and where. From reviewing the home occupation permits issued in the study period, it is evident that although these developments are scattered throughout the County, the majority are approved on lands situated in the southern portion.

4.7.3 Hamlet Industrial/Commercial Activity

Within the boundaries of Lethbridge County, eight incorporated communities have been designated as hamlets: Chin, Fairview, Kipp, Monarch, Diamond City, Iron Springs, Turin, and Shaughnessy shown in Figures 2 through 9. These urban settlements within the County provide both services and amenities, and a variety of housing options to County residents.

As outlined in section 59 of the Municipal Government Act, an unincorporated community may be designated as a hamlet if the community:

- consists of five or more buildings used as dwellings on parcels smaller than 1859 m^2,
- has a generally accepted boundary and name, and
- contains parcels of land that are used for non-residential purposes.

Only seven of the eight designated hamlets meet the above criteria of the MGA, as Kipp does not have the required number of dwellings. The province is no longer permitting municipalities to apply for provincially recognized hamlet status for new unincorporated communities. These rural urban areas are largely residential in nature and approvals of industrial uses have, in the past, met with some opposition and complaints from residents. The County has completed growth studies for all the hamlets. These reports look at the current state of the hamlets and some of the reports identify and illustrate non-residential growth opportunities as described below.

Hamlet of Chin Area – located in the NE¼ 25-9-19-W4, adjacent to the Municipal District of Taber.

The hamlet lies just north of Highway 3 and the CPR line and occupies approximately 18.97 acres. Chin presently has no commercial or industrial development and no land designated as hamlet commercial or hamlet industrial. There are few vacant lots present, and the majority of the lots have been developed for residential purposes. The growth study for Chin does not include any future commercial or industrial development due to the servicing restrictions and general residential nature of the hamlet. However,

directly south of the hamlet, approximately 140.18 acres has been zoned for rural general industrial development and McCain's Foods operates a large processing plant at that location.

Hamlet of Fairview – located in the NW¼ 34-8-21-W4, adjacent to the eastern boundary of the City of Lethbridge.

The hamlet lies at the junction of Highways 4 (43 St.) and 512 and occupies approximately 37.19 acres. Due to the close proximity of the hamlet to Lethbridge, Fairview has one of the largest commercial and industrial development areas within its boundaries of all of the hamlets. Approximately 5.43 acres are designated as hamlet industrial while much of the commercial development is zoned direct control (2.13 acres). The largest parcel of land, consisting of 4.92 acres is the former site of Hepp Autowreckers. With environmental reclamation work, this site could be repurposed for development provided the hamlet's current infrastructure handling/capacity problems were resolved. Overall, land use survey fieldwork revealed that there are few vacant lots present, and the majority of the lots have been developed for residential purposes. The growth study for the hamlet of Fairview includes an opportunity for infill commercial/industrial development on the east side adjacent to the existing commercial development.

Hamlet of Kipp – located in the SW¼ 29-9-22-W4, between Highway 3 and the CPR line.

The hamlet occupies approximately 2.47 acres and all of the land within the hamlet boundaries is designated as direct control. Although Kipp does not meet the formal criteria for hamlet under the Municipal Government Act, it is still a historically designated hamlet with a name and a boundary defined in the Lethbridge County Land Use Bylaw. A land use survey revealed two residences present and no industrial or commercial development has occurred. All land within the hamlet boundary is privately held or owned by the province (i.e., Alberta Transportation).

Hamlet of Monarch – located in the SW¼ 7-10-23-W4, adjacent to Highway 3A.

The hamlet occupies approximately 92.66 acres of land. Approximately 1.93 acres is designated as hamlet commercial and no land is zoned hamlet industrial. The only main designated commercial development site within Monarch is the former hotel site. In the mid-2000s, the hamlet obtained a municipal wastewater lagoon system and treated water is available from a water line from Lethbridge. Again, the majority of the lots within the hamlet have been developed for residential purposes and there are only a few undeveloped parcels located throughout the community. The relocation of Highway 3 south of the hamlet may have had a negative impact on the commercial and industrial appeal of Monarch. It is noted that there is a 14.8-acre strip of railway land north of the hamlet boundary that currently contains an industrial development. This business takes advantage of the CP rail siding and has seen some expansion in the last few years. The growth study for the hamlet of Monarch looks at future development on the west side of the hamlet and there may be an opportunity for future commercial development in that area. It is noted that the population of the hamlet and area must increase to support any future commercial activity.

Hamlet of Diamond City – located in the SW¼ 6-10-21-W4, adjacent to Highway 25.

The hamlet occupies approximately 125.89 acres with approximately 0.26 acres of land designated as hamlet commercial and no land is zoned hamlet industrial. A land use survey for the hamlet revealed that the majority of the lots have been developed for residential purposes and vacant parcels are located adjacent to the highway. Over the last decade, the hamlet has benefited from the installation of a treated water line and sewage treatment system although there is presently no additional capacity without an expansion occurring. The growth study for the hamlet of Diamond City looks mainly at residential growth

with a potential for highway commercial development along Highway 25. It is noted that commercial development may not occur until such time that the population of the hamlet and surrounding area can support such uses.

Hamlet of Iron Springs – located in the NW¼ 20-11-20-W4 and NE¼ 21-11-20-W4, adjacent to Highway 25.

The hamlet occupies nearly 47 acres. Approximately 1.24 acres of land in Iron Springs is designated as hamlet commercial and 12.91 acres is designated hamlet industrial. A land use review and survey for the hamlet reveals that there is no active commercial development, but some industrial activity related to agriculture located on the former CPR right-of-way. Again, the majority of the lots within the hamlet have been developed for residential purposes and undeveloped parcels were located in the eastern portion of the community. In the early 2000s, the hamlet benefited from the installation of a treated water line, which supplies the domestic water for the hamlet. The County's 2012 purchase of former railway land and subsequent sale of some of those lands has resulted in industrial development. The growth study for the hamlet of Iron Springs has identified that the land currently owned by the County on the east side of the hamlet would be areas that could see future commercial/industrial growth.

Hamlet of Turin – located in the SE¼ 4-12-19-W4 and SW¼ 3-12-19-W4, adjacent to Highway 25.

The hamlet occupies an area of approximately 67.05 acres. Approximately 0.32 acres of land is designated as hamlet commercial, and 8.6 acres of land is zoned hamlet industrial along the former rail right-of-way. A land use survey for the hamlet reveals here is one active commercial development and some minor industrial activity related to agriculture. Like other hamlets, the majority of the lots within Turin have been developed for residential purposes and undeveloped parcels were located in the eastern portion of the community. Such as Iron Springs, the hamlet has also benefited from the installation of a treated water line, and a municipal wastewater lagoon system was installed in 2011. The growth study for the hamlet of Turin includes opportunities for future commercial and industrial development. Since the creation of the growth study the County has expanded the hamlet industrial area and created 8 lots. Four of the lots which were serviced (water and sewer), were sold but currently remain undeveloped. The remaining four lots are currently not serviced and may be listed for sale in the future once the existing industrial lots have been developed.

Hamlet of Shaughnessy – located in the W½ 30-10-21-W4 and portion of NE¼ 25-10-22-W4, adjacent to Highway 25.

The hamlet occupies approximately 76.78 acres of land. Shaughnessy contains the largest amount of hamlet commercial zoning at approximately 5.56 acres and an additional 2.8 acres of land is zoned hamlet industrial. The majority of the lots within the hamlet have been developed for residential purposes, but parcels located adjacent to Highway 25 form a corridor of non-residential development. The hamlet receives potable water through a regional water line and sewage is handled by a municipal wastewater lagoon system. The growth study for the hamlet of Shaughnessy includes some areas for future commercial development south of the hamlet adjacent to the existing commercial development.

HAMLET MAPS

Figure 2: Hamlet of Chin Area from Land Use Bylaw

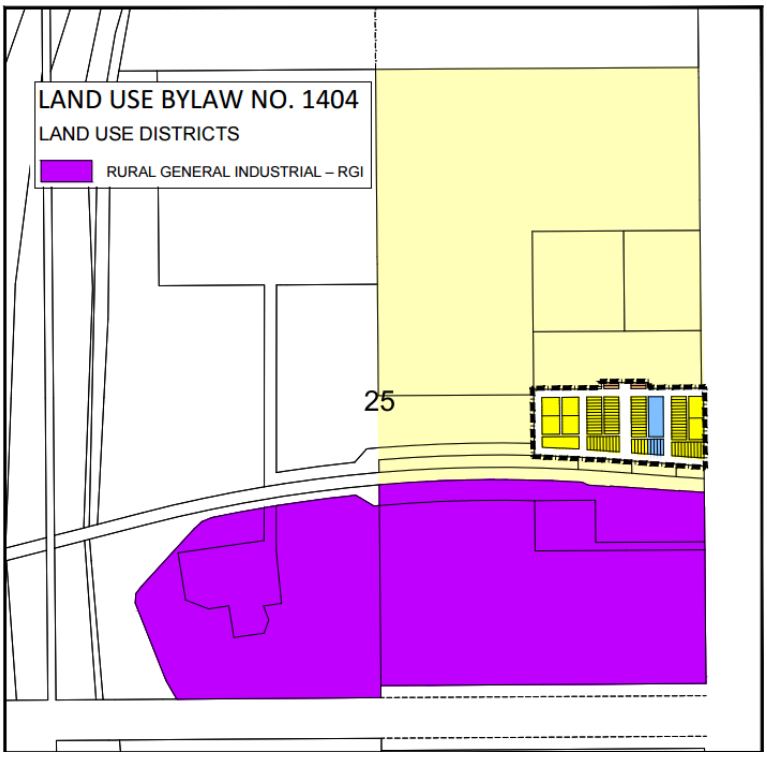


Figure 3: Hamlet of Fairview from Land Use Bylaw

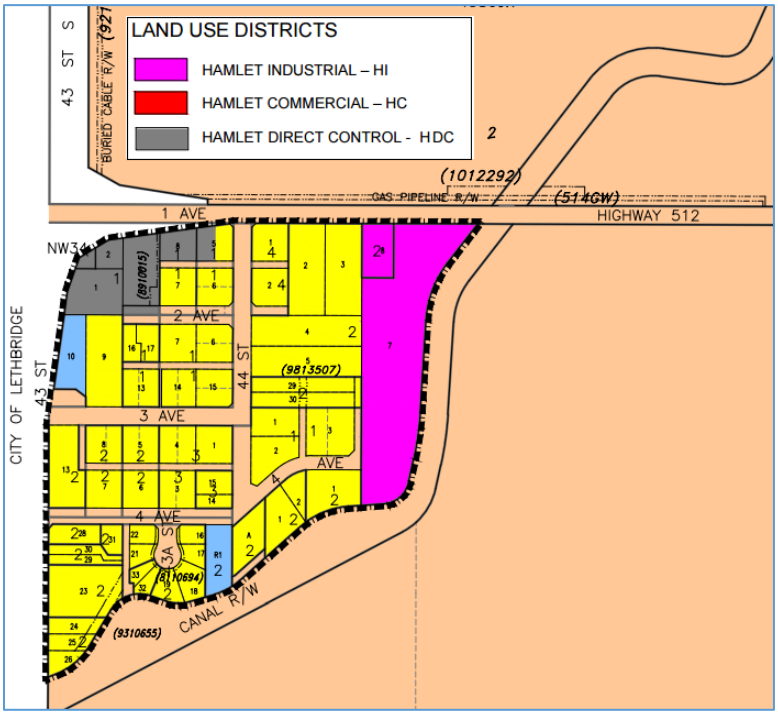


Figure 4: Hamlet of Kipp from Land Use Bylaw

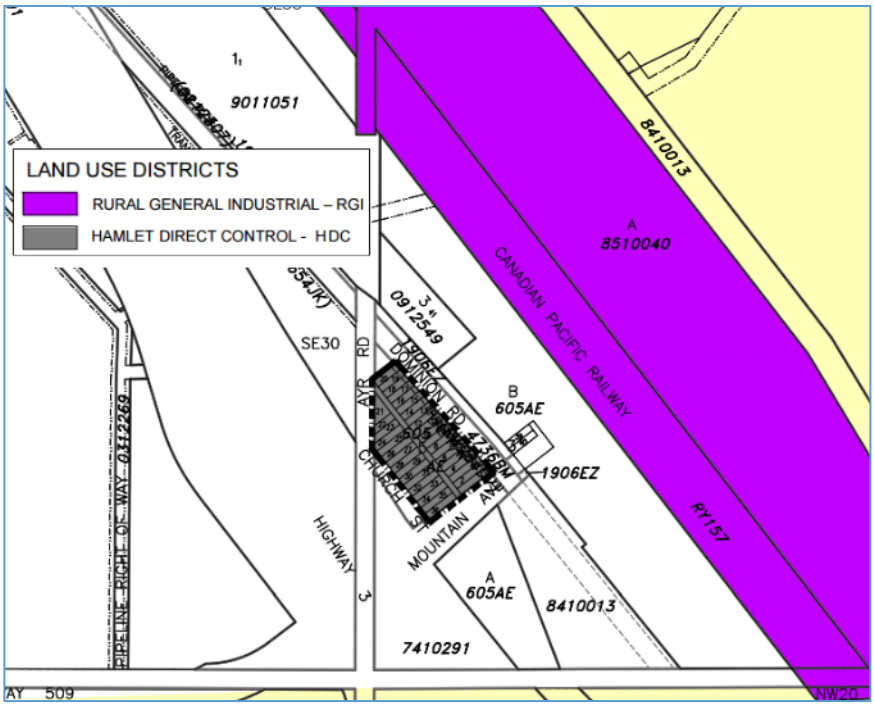


Figure 5: Hamlet of Diamond City from Land Use Bylaw

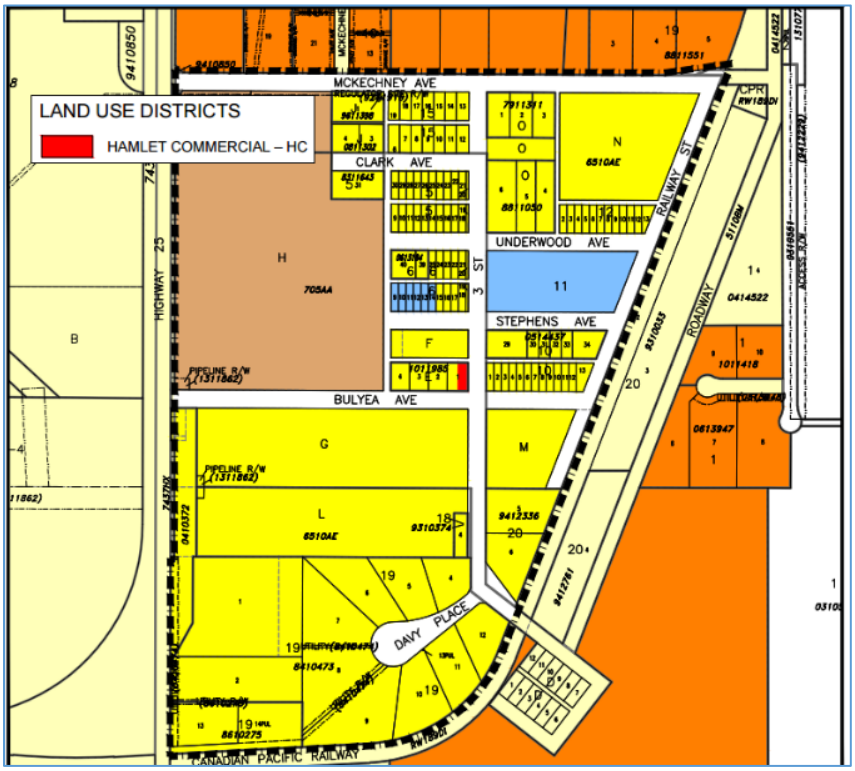


Figure 6: Hamlet of Iron Springs from Land Use Bylaw

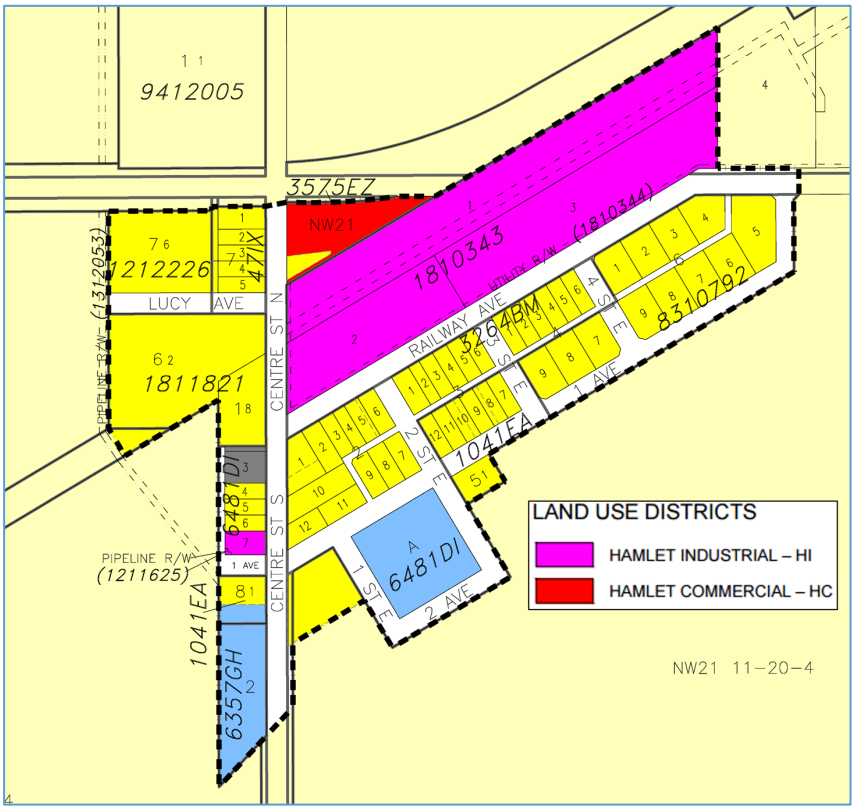


Figure 7: Hamlet of Monarch from Land Use Bylaw

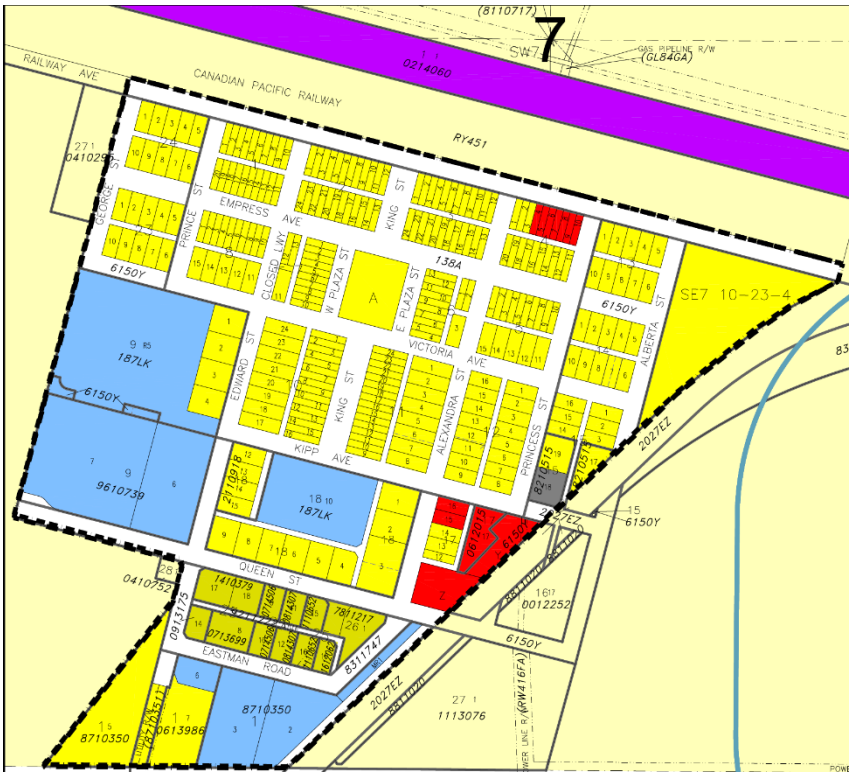


Figure 8: Hamlet of Turin from Land Use Bylaw

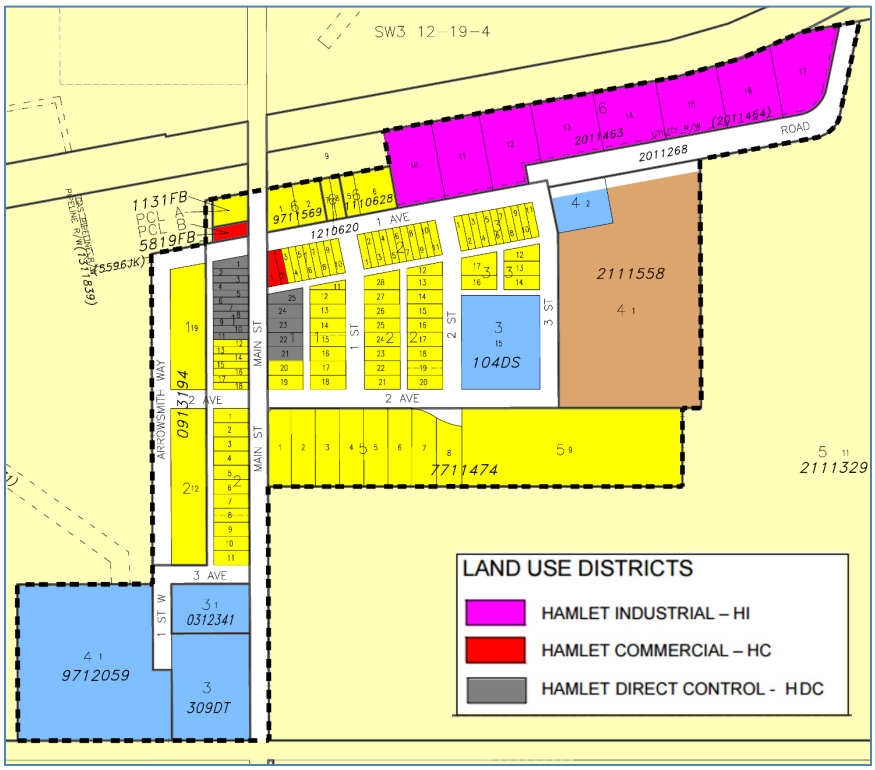


Figure 9: Hamlet of Shaughnessy from Land Use Bylaw

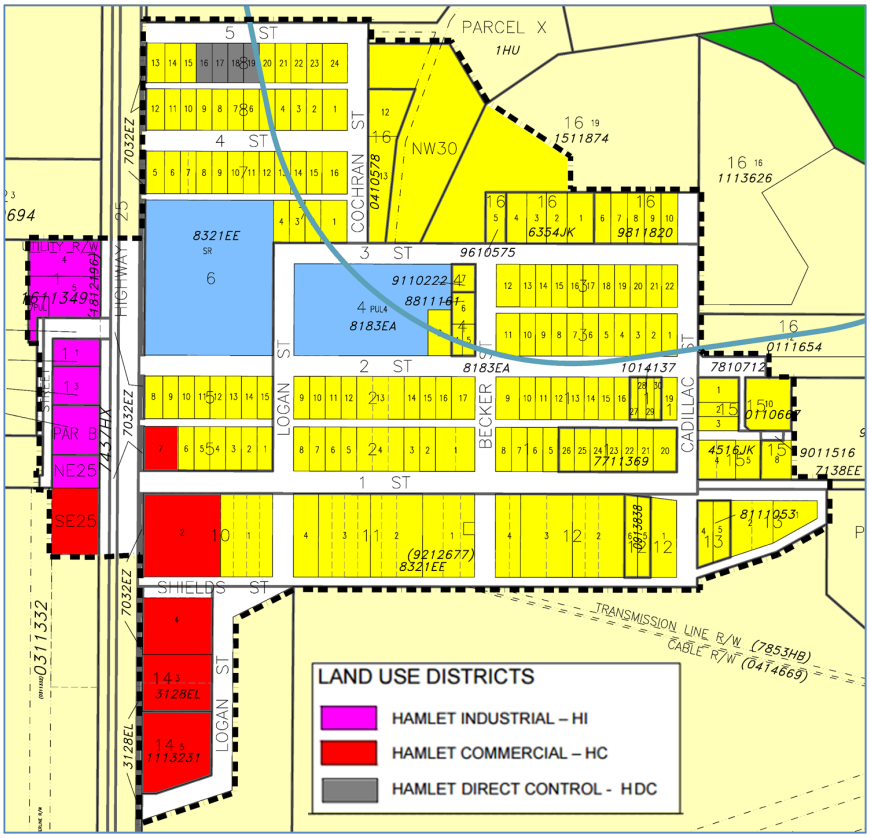


TABLE 8

Hamlet - Designated Commercial/Industrial Land Use 2022

Hamlet	Industrial land Existing Acres	Commercial land Existing Acres	Vacant Industrial Acres	Vacant Commercial Acres
Chin	0.0	0.0	0.0	0.0
Fairview	5.43	0.0*	3.5	0.0
Kipp	0.0	0.0	0.0	0.0
Monarch	0.0	1.93	0.0	0.2
Diamond City	0.0	0.26	0.0	0.0
Shaughnessy	2.8	5.56	0.0	1.83
Iron Springs	12.91	1.24	5.7	0
Turin	8.6	0.32	8.6	0.0
TOTAL	**29.74**	**9.05**	**17.8**	**2.03**

Source: ORRSC Land Use Analysis 2022

* Fairview has land designated as Direct Control (2.13 acres) which contains commercial type developments.

4.7.4 Grouped Industrial/Commercial Areas

For the purpose of this study, grouped industrial or commercial areas have been defined as those areas where development has been approved, by either zoning, subdivision or both, into clustered industrial business park type developments. Within Lethbridge County, ten such formal and established sites exist which include:

- Stewart Siding Industrial Park
- RAVE Industrial Park
- Chinook Industrial Park
- Broxburn Business Park and Corridor Area
- Railside Business Park
- Kipp Marshalling Yard Area
- Duncan Airport Industrial Park
- Airport Lands – Lethbridge Regional Airport
- Taylor Business Park
- Viterra/Transmark

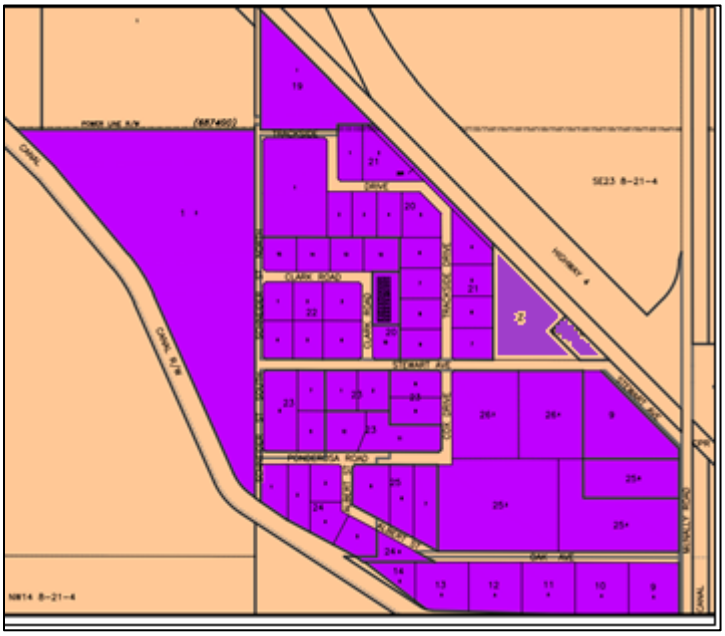
Stewart Siding

Stewart Siding is located east and south of the City of Lethbridge limits on Highway 4 and was originally surveyed in 1911. In 1978, County Council decided to formally allow light industrial development to occur and consequently, an area structure plan was prepared and adopted in 1981. Stewart Siding became the first rural area within the County to be comprehensively planned and developed as an industrial park. Stewart Siding's potential as a light industrial area and its subsequent rezoning from rural agriculture to light industrial use in 1978 was based on a number of site characteristics:

- the area is well-defined and self-contained due to severe physical barriers (e.g. roads, highway, irrigation canal, railway);
- there is good access from a provincial highway;
- the area has a high water table and poor drainage and is not suitable for other non-agricultural development — although this may appear problematic, it enabled higher value use to the land allowing for improvements to occur;
- land ownership pattern was fragmented.

Stewart Siding is approximately 200 acres in size and the area, most of which forms part of the plan registered in 1911, was originally divided into 5-acre parcels. Further subdivision of the area occurred in 1980, 1982, 1986, 1990 and most recently in 2010. An additional 31.26 acres of undeveloped land was zoned and added to Stewart Siding in 2013, increasing it in size from the previous 169 acres. Currently, there are approximately 60 lots within the area structure plan boundary, 27 more than were depicted in the original 1981 plan.

Figure 10: Stewart Siding

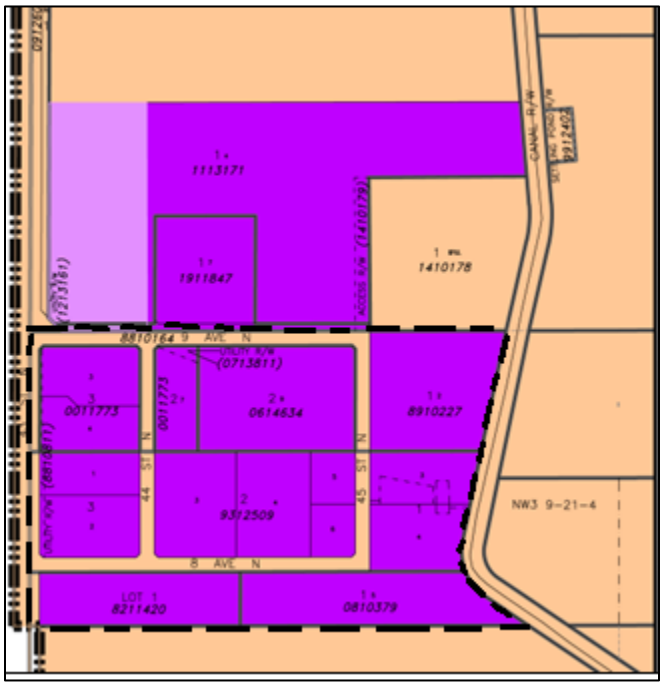


RAVE Industrial Park

The RAVE Industrial Park is located on approximately 60.0 acres of land adjacent to the east side of 43rd Street North, between 5th and 9th Avenues (NW 3-9-21-W4). Ideally located with excellent access via Highway 3 and 43rd Street, the property was zoned industrial by Lethbridge County in 1968, primarily for light industry. An area structure plan was prepared for the area in 1982 and subdivisions occurred in 1987, 1988 and 1993. A 10-acre serviced area immediately north of RAVE was designated to Direct Control for parking lot use in 2013, and a public utility lot was constructed to help manage surface drainage in the area. These lands are now officially within Chinook Industrial Park, which was approved in 2018.

The existing developments in RAVE are serviced with water and sanitary sewer by the City of Lethbridge through an agreement with the County. The City of Lethbridge recently has indicated that there is no present additional city capacity to service this area. Issues with the proper control of surface drainage run-off have also been a problem in the past. Currently, the RAVE subdivision is primarily fully developed with 15 lots of various sizes with development taking place on the majority of lots. There is little internal room for in-fill development unless some existing uses or buildings were to be redeveloped or removed.

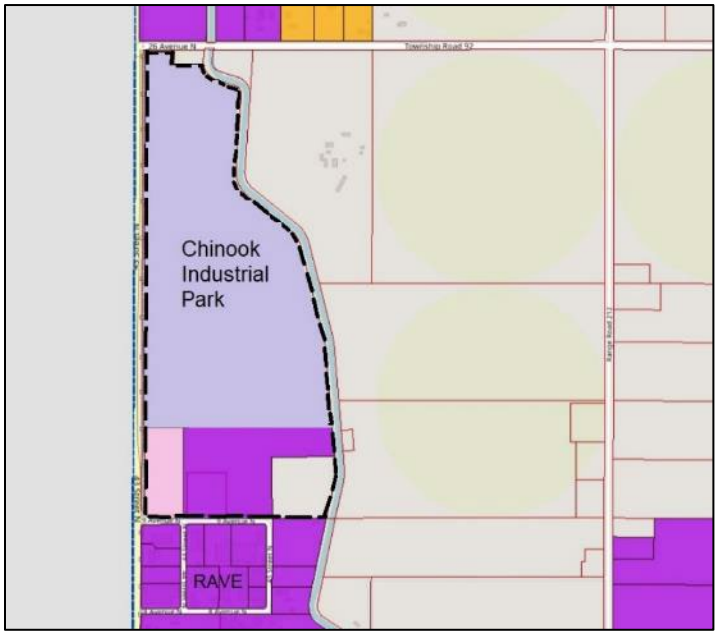
Figure 11: Rave Industrial Park



Chinook Industrial Park

The Chinook Industrial Area Structure Plan (Bylaw 18-012) was adopted in 2018 by the County. The subject land is comprised of 202.25 acres for future business light industrial and general industrial use and is located east of the Lethbridge Industrial Park and directly north of Rave Industrial Park. This location benefits from access to 43rd Street, which is one of the major transportation points for the industrial area. Parcels along 43rd Street will provide for business light industrial uses, while the remaining lands in Chinook Industrial Park will accommodate rural general industrial, which is a valid land use siting decision and should be beneficial for a variety of businesses looking to establish in the industrial park. Roads will be paved and meet municipal standards to allow for truck access. There has been development along the south side of the area for Southland Industries, but the remainder remains undeveloped. It is anticipated that the area will be serviced with potable water from the City of Lethbridge but access to the wastewater system will be limited due to the constraints on the City's wastewater system.

Figure 12: Chinook Industrial Park



Highway 3 Corridor Area (west of Broxburn)

In proximity to the Broxburn Business Park are some other parcels of land that have begun to develop unofficially as part of the Highway 3 corridor commercial-industrial area. Almost a half-mile west of Broxburn on the southside of the highway is approximately 69 acres of land designated as rural general industrial, used entirely at this time by Corteva (formerly Pioneer Seeds). Further development is likely to occur in these areas if further planning is undertaken. Applicable to this area is the *Integrated Development Strategy* report which recognized the potential of the Highway 3 corridor to be developed to support economic development for the region, albeit in a clustered, orderly and managed fashion.

Directly to the north of Corteva and east of Marshall Auto wreckers is a cluster of parcels that include a mix of residential and light industrial businesses. This area is seen as a future development area and has seen increased light industrial activity with the expansion of Advantage Trailers. The Advantage Trailers parcel is designed business light industrial. This area is seen as transitional and will require that an area structure plan be created and approved to create a framework for the future subdivision and development of this area for light industrial/commercial purposes.

Figure 13a: Marshall Auto

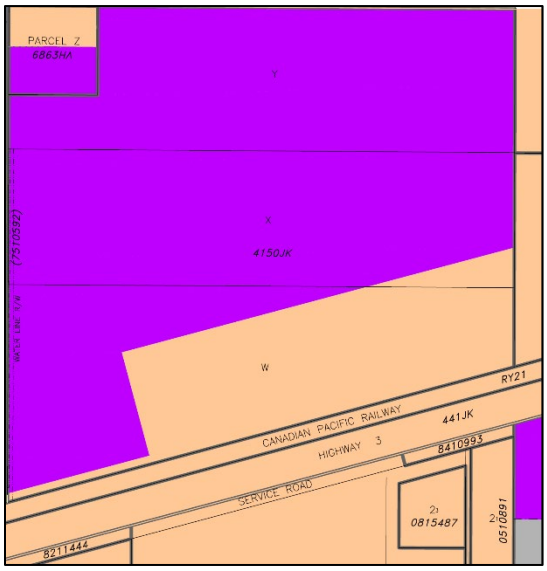
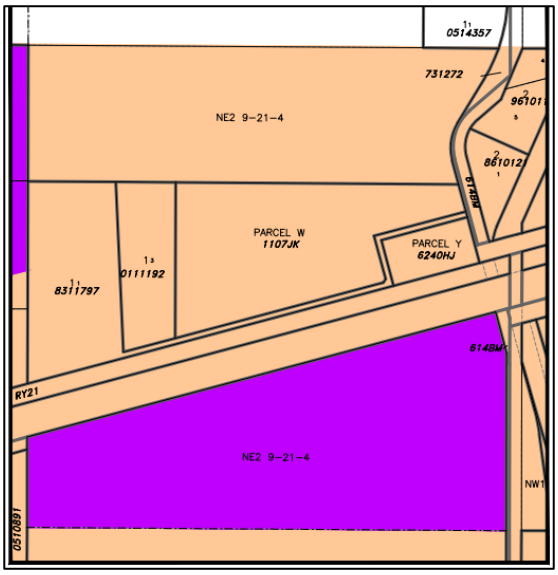


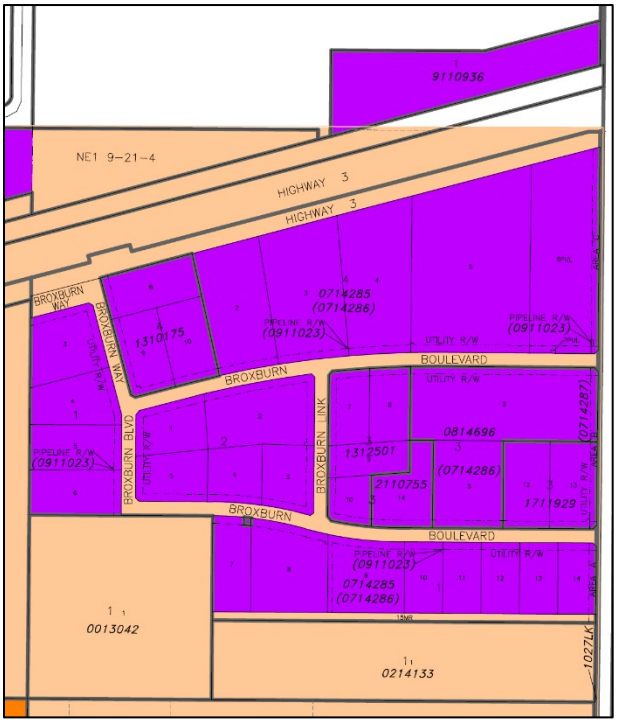
Figure 13b: Corteva



Broxburn Business Park

The Broxburn Business Park is located in the NE¼ 1-9-21-W4, adjacent to east-bound lanes of Highway 3 between Lethbridge and Coaldale. The area was originally approximately 122 acres in size and was first rezoned to grouped rural industrial in the 1970s with no serious attempts to develop the area until the early 2000s. The property became known as the McKay Brothers Industrial Area, who subdivided approximately 15 acres for a church development and prepared an area structure plan to guide future development on the remainder. This land development later changed ownership once again and later took-on the Broxburn Business Park name in which it is now known by. The average lots range in size from 1.3 acres to 10 acres and the highway frontage lots will see the highest traffic counts in southern Alberta. Although there are currently eight lots sitting vacant, the majority of lots have been sold and likely will be built upon in the short-term. Some larger lots (e.g. 4 - 10 acres) may potentially be resubdivided, but overall, Broxburn Business Park has very limited further development capacity.

Figure 14: Broxburn Business Park Area



Railside Business Park

East of Broxburn on the north side of the Highway 3 corridor to Coaldale, a portion of the SE 7-9-20-W4 (approximately 70 acres) was redesignated to 'Rural Grouped Industrial' in 2016 for an expansion to the Railside Business Park. This parcel is immediately adjacent to and west of the existing business park. The parcel is the land lying between the west title boundary and future CANAMEX area, the existing Railside Business Park to the east. Approximately 18 acres has been developed for the initial park along with the internal road and storm pond land included. The business park does not take access directly from the highway, but from a private internal local service road. The redesignation in 2016 excluded the western-most 160 meters to address Alberta Transportation's requirements and ensure that the CANAMEX corridor remains in the Rural Agriculture district. Railside Business Park comprises of small bay industrial buildings, Andres Trailer Sales, Ditech Corporation, large cold storage units and the Superior bulk propane. There is approximately 11 acres of vacant land within this area that is zoned rural general industrial.

Figure 15: Railside Business Park / Andres Trailers



Kipp Marshalling Yards

The Kipp Marshalling Yards consist of 90 acres of land located adjacent to the Hamlet of Kipp and Highway 3. The yards are managed by Canadian Pacific Railway (CPR) as their southern Alberta operations hub. The lands are primarily used for the transportation operations of the CPR itself and have been operating at capacity (2013-2014). Although the CPR lands themselves may not be presently utilized by other private business, there may be future opportunity for compatible land uses on lands in the vicinity.

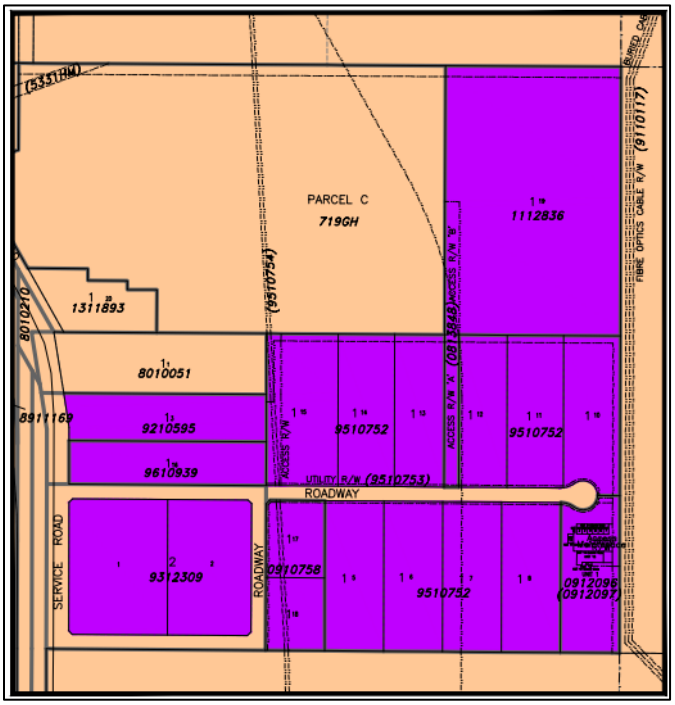
Figure 16: Kipp Marshalling Yard



Duncan Airport Industrial Park

The Duncan Airport Industrial Park is located adjacent to the Lethbridge County Airport along the east side of Highway 5. This area consists of approximately 95 acres of unserviced industrial lots. The grouped industrial development evolved from an original proposal to subdivide a 7.4-acre parcel from an 80-acre parcel for a hay compaction plant. In 1978, further subdivision occurred and the property (approximately 75 acres) was rezoned from rural agriculture to rural grouped industrial as required by the County Bylaw at the time. The lots are mainly 4.0 acres in size, and most are developed but may have some undeveloped portions of the lot used for storage. Some private land owners own 2 or 3 adjacent titles. In 2011 expansion started to occur into the north 80-acre title, as 23.10 acres was designated to RGI. This area may be suitable for growth subject to additional long-term planning and design work being undertaken.

Figure 17: Duncan Airport Industrial Park



Lethbridge Airport

The Lethbridge Airport is located approximately 5 km south of the City of Lethbridge adjacent to Highway 5 (south of Mayor Magrath Drive in the city). These 37 acres of industrial airport land originally established in 1939, and currently plays host to several different businesses and organizations. Existing commercial development is concentrated to the northeast of Runway 12-30 and is a cluster of both aviation related and non-aviation related development. The City of Lethbridge took over ownership of the airport in 2018 and is in the process of creating a new Master Plan for the airport lands. If at some point the airport lands are annexed into the city, the commercial business portion would no longer contribute to the County non-residential assessment base.

Taylor Business Park

The Taylor Business Park is located on the north side of Highway 508 west of Highway 4. There have been some grain handling facilities adjacent to the CPR tracks for decades, and in 2008 some preliminary subdivision to allow for some other business uses occurred. In 2015, an area structure plan was prepared and adopted and over 96 acres of land was designated to Rural General Industrial use for the Taylor Business Park. This industrial park–has seen recent subdivision and development activity with the expansion of the Ritchie Brothers Auction and some industrial bays being developed. Future development phases will see the creation of up to 25 parcels for industrial/commercial uses. Due to Highway 4 and 508 and future transportation access issues that need to be addressed, approximately 55 of the 96 acres may be developed in an initial first phase. Once longer term planning and transportation strategies have been formalized, there is the potential for expansion to the north of this in the future.

Figure 18 : Taylor Business Park



SW & NW 27-7-20-W4 – Viterra/Transmark

Southeast of Lethbridge situated adjacent to Highways 4 and 845 and the CPR line are lands being used for some industrial use. In 2014 Viterra purchased the former Lethbridge Inland Terminal Ltd. grain handling facility which is situated on 200 acres of land adjacent to Highway 845. To the northeast, and parallel to the rail-line, a 65-acre parcel is owned by Transmark Ltd. which is presently designated as RGI. Both Transmark and Viterra actively utilize a siding of the CP Rail. Transmark have 20-spur tracks and can accommodate a full unit train off the mainline along with storage capacity for up to 600 rail cars. This is an area of interest for further expansion of this type of commodity handling/industrial land use activity by Transmark. The area is substantially developed with Transmark having added railcar storage and a laydown area for wind turbines, while Viterra has also expanded and has plans for a loop rail track next to the grain elevators. As a result, although this is a large land area there is not much surplus vacant land available for other industries due to Transmark and Viterra's own growth plans. The Area Structure Plan was approved in 2016 with the objective of allowing for the future development and subdivision on this area for industrial uses. There is a small, currently undeveloped, 2.5-acre parcel north of the Transmark property that is designated rural commercial.

Figure 19 : Viterra/Transmark



Intermunicipal Development Plan (IDP) Areas

The County has also identified new commercial/industrial areas in accordance with some Intermunicipal Development Plan agreements with neighboring urban municipalities, including Nobleford, Coalhurst and Picture Butte. These areas are largely undeveloped at this time and remain in agricultural use, with some additional planning and servicing work required prior to industrial conversion. These would be considered longer-term development and growth areas. These areas will be further discussed in the Land Use Strategy section of this report.

Summary

As a snapshot in the present time (2022 year-end) it is estimated that there is approximately 379 acres of designated vacant land currently available within the nine designated grouped/clustered business parks zoned to accommodate industrial use. Some of the vacant lands are presently raw parcels with no roads or servicing, and although they are considered for industrial-commercial use, they would require additional planning processes to occur, including subdivision and in some cases an Area Structure Plan update. It is noted that Taylor Business Park may initially only develop 55 acres, so the actual total available in the foreseeable future may be closer to 324 acres.

Table 9 illustrates a summary of existing land use and land availability.

TABLE 9
Grouped/Clustered/Designated Industrial Land Use 2022

Industrial / Business Park	Total Area Zoned for Industrial / Commercial (acres)	Existing Area Occupied (acres)	Existing Vacant Developable Land (acres)*
Stewart Siding	169.0	97.7	71.3
RAVE	60.00	58.00	2.00
Chinook Industrial Park	202.25	38.08	164.17
Broxburn Business Park	95.00	77.32	17.68**
Railside Business Park	70.00	59.00	11.00
Kipp Marshalling yards	90.00	90.00	0.00
Duncan Airport Industrial Park	81.00	70.74	10.26
Taylor Business Park	137.70	38.4	99.5
Viterra/Transmark	278.7	275.8	2.9
TOTAL	**1183.65**	**805.04**	**378.81**

Source: ORRSC Land Use Analysis 2022
** Vacant developable land refers to both vacant and unplanned internal unsubdivided raw land that could be developed if accordingly planned*
*** Some of the parcels have approved development permits but construction has not commenced, so vacant land availability in reality is likely much lower*

PART FIVE | Land Use Strategy

5.0 Introduction

The previous sections of this report contained an overview and analysis of past and present economic and land use conditions pertaining to industrial/commercial land use development in Lethbridge County. That data forms the basis of guiding and planning for future land use to support economic growth in the County. The County desires to attract good, sustainable industry that will be a "net positive" for the municipality, that overall, the business will bring in more tax revenue than it will cost to provide services.

This section is to address the main purpose of the report which is to identify and protect suitable land areas within the municipality that may appropriately be planned to accommodate industrial or commercial development, without negatively affecting other existing uses or conflict with other County policies or goals.

5.1 Identification of Economic and Land Use Trends

In 2018 Lethbridge County undertook a business retention and expansion survey to assess existing businesses satisfaction within Lethbridge and where there are areas where the County may improve upon or assist in the retention and expansion of those businesses. The survey indicated that for the most part businesses within the County are satisfied with being within Lethbridge County. Some areas that were noted as concerns were the investment with internet infrastructure, availability of skilled labour and general internet services. The survey noted that over 50 percent of respondents were planning to expand within the next two years and would do so within Lethbridge County.

5.1.1 Broad Industrial and Economic Processes

There has been a considerable change to urban industrial development during the twentieth century which scholars have attributed to three different processes: de-industrialization (traditional industries declining in the face of international competition), decentralisation (the movement of manufacturing industries to better locations outside of urban core areas), and decongestion (decentralisation of manufacturing to suburban locations)[3]. These processes have resulted in significant amounts of industry relocating from inner city locations to outer locations with better access to highways.

It is obvious that good location is strongly desired for businesses and supports industrial development. However, what constitutes a 'good' location differs by industry and business, but proximity to highways is of growing importance. Major industries increasingly do not want to be located in inner urban areas, due to potential land use conflicts and congestion, and instead prefer close proximity to highways.

Many industrial businesses also desire larger parcels of land in order to accommodate their horizontal-design buildings along with sufficient space for other uses such as parking, loading and storage. Additionally, businesses will characteristically acquire more land than they initially require in order to

[3] Daniel J Graham, *Identifying urbanization and localisation externalities in manufacturing and service industries, Imperial College London – Centre for Transport Studies. 2007*.

accommodate potential future expansion of business. Businesses typically want the opportunity to expand their facility at their existing site rather than experiencing the disruption associated with relocating to another site. Some industrial uses have significant negative impacts (such as noise, vibration, smell, traffic, etc.) which can be offensive to surrounding land uses, especially residential.

Transportation access and infrastructure improvements are major drivers of industrial development. Development is very site specific, and what may be possible in one location may not be possible in another. As land prices increase, some industrial users that can relocate to other lower cost jurisdictions will do so, while other industrial users that are local serving will need to remain in the region. Availability of servicing, as required by the type of business or use, will also factor into locational decision making.

Other general industrial land use concepts that the County should consider and may influence or be beneficial for industrial businesses to locate on a larger parcel of rural land, include:

- Logistics - Intermodal Transportation Facilities/ Logistics Centres
- Industrial intensification
- Industrial symbiosis / localization
- Clustered/ Nodal Development
- Growth in Alternative Energy Sources
- Eco-Industrial Parks

Intermodal Transportation Facilities / Logistics Centres are where intermodal shipping containers are off-loaded or on-loaded from trains to semi-trucks for distribution. Intermodal distribution (logistics) centres are large facilities that combine intermodal railway terminals with nearby warehouse distribution and freight facilities. Both the transfer and storage operations are combined on one site and these facilities also require easy access to major highways. These inland "terminals" can be large scale, typically a minimum of 200-300 acres in size (often over 500 acres), contain massive warehouses and often represent a collaboration between the shipping companies, rail companies, development companies and various levels government. These complexes are designed to handle goods brought by rail from coastal ports and then transfer them by truck to on-site warehouses for storage and are then eventually transported to distant retail outlets, distribution centres and manufacturing plants.

Industrial intensification optimizes land potential by allowing industrial sites to achieve higher density forms of development, and by facilitating new growth through the re-development of existing underutilized sites. The benefits of industrial land intensification are to reduce the pressure to convert agricultural and rural lands to industrial uses by using lands and resources more efficiently, reducing impact on the environment, accommodating an increase in economic and employment activity on a limited land base, using transportation infrastructure more efficiently, and generally extending the lifespan of available industrial lands.

Industrial symbiosis / localization refers to industrial interaction or sharing of by-products between industries, depending upon what type of industries are developed in the area. Symbiosis may occur for example, when an industry produces waste by-products (i.e., heat, toxic chemicals) that are useful to other industries located in proximity. Instead of these industries functioning separately, these industries can create an association that is mutually beneficial to one another and function in a format similar to natural biological processes. In order for industrial symbiosis to work properly there must be a grouping or cluster of industries in relatively close geographical proximity to one another, with commonality

between certain uses in their inputs and outputs, and an intricate, connected infrastructure network between the uses (i.e. pipes between facilities). Using agricultural processing waste or bi-mass processes to generate geo-thermal heating is a simple example.

Localization refers to many businesses in the same industry locating close to each other, as geographical proximity increases the ease of communication facilitating 'technological spillovers' and innovation between firms within the same industry, and often results in greater efficiency through increasing return of scale in intermediate inputs for a product at lower costs.[4] The introduction of related services in industrial areas also often makes them more attractive to larger employers.

Clustered/ Nodal Development refers to a planning and development land use approach that encourages using land resources and services more efficiently (i.e., compact building forms, infill development etc.) and concentrates uses in close proximity, typically adjacent to major transportation corridors or nodes (intersections), appropriately planned to preserve adjacent agricultural land or greenspace. Site specific, buildings are also in close proximity together on a portion of the site, often sharing common yard space, to allow the remaining land to be used for recreation, open space, agriculture or preservation of historically or environmentally sensitive lands.

Growth in Alternative Energy Sources, which refers to renewable or sustainable energy that is generally derived from natural sources (for example, the earth, sun, wind, water), are ideal to be located in rural municipalities and are compatible with agricultural land use. For example, wind turbine farms utilize a small footprint on the land and the structures can still be grazed or farmed around. Large solar panel farms also often require a large land base and do not want to be located in high density urban settings. Where traditional services (i.e., electricity, gas heat) are deficient, alternative energy sources may be developed or used as a by-product of large-scale alternative energy facilities. The growth in other alternative energy industries, such as biomass or bio-fuel production, also benefit from being close to a raw crop or nutrient source/stock which is provided by agricultural producers.

Eco-Industrial Parks refer to a business or industrial park that is designed to help achieve sustainable development, with the intention of increasing economic gains and improving environmental quality. It typically attempts to integrate a variety of preservation and renewable energy technologies throughout the park. This may be desirable in a rural setting, as a well-designed eco-park can assist with storm water management for an area by introducing a more natural wetland system and can utilize different servicing tools where providing traditional services may be challenging, such as sanitary sewage treatment. For example, an eco-park may be designed to employ an alternative wastewater system that will utilize wetlands. Some parks have been designed to use a "Small Bore Sanitary Sewer System (SBS)" in which a clarifier tank is located on each lot which provides primary treatment of sewage. SBS also uses high density polyethylene pipes, which is a trenchless technology that minimizes construction surface disturbance. The use of "grey" water may also be encouraged, where non-potable water can be used. Typically, the buildings in the park have double plumbing to carry both potable and non-potable water, such as is done in the Broxburn Business Park in Lethbridge County. Grey water may also come from wastes created by industrial processes or from an on-site local wastewater treatment plant.

[4] *Daniel J Graham, Identifying urbanization and localisation externalities in manufacturing and service industries, Imperial College London – Centre for Transport Studies. 2007.*

5.1.2 Local Economic Factors

The agricultural services industry is a major contributor to the Lethbridge County and regional economy. It is obvious there is a strong correlation between the profitability of primary agriculture in the County and the high number of businesses that service it. Over time, the acreage of specialty crops processed in Lethbridge County has been increasing due to their high value, improved plant breeding, machine development, processing and marketing options, low grain prices, and restrictive quotas for grain delivery. The achievement of better crop yields and a wider variety of crop production has also led to the substantial growth of seed and forage industry within the County. It is apparent that much of the present innovation that is occurring in the local economy is associated to the number of companies that focus on research and development to enhance the growth cycle and fortitude of the seeds and inputs associated with crop production. The "bio-industrial" sector is establishing an interest in the Lethbridge area which is not surprising, given that it can benefit from synergies with local producers, educational institutions, and the research centre.

Additionally, there are many other businesses and opportunities for growth and investment outside of the primary agricultural industry. This includes the growth of industries related to transportation, warehousing, construction, manufacturing and food processing. There are also numerous local trucking and shipping firms offering local, provincial, national and international freight services.

The Canadian Pacific Railway (CPR) company has also recently indicated that it envisions there to be long-term local growth in the transportation of rail freight. However, the CPR itself is not contemplating developing any major intermodal transportation facilities in the Lethbridge area and will likely locally focus on increasing its share of bulk shipping (grains, potash etc.). Canadian Pacific, however, does recognize there may be potential opportunities for additional spur lines that would serve local industries or the setting up of a smaller-scale transloading facility. A benefit to Lethbridge County regarding this, is the fact that the main marshalling yards for the region are located at Kipp, and logistics or transloading centres, even smaller-scale, do benefit from synergies of being located near highways and in proximity to other related uses.

It is recognized that agri-business is an important industrial sector for Lethbridge County and is both closely associated to and is a complimentary industry to agriculture. This is an ideal and logical industry sector to establish and expand in a rural municipality, as the industry is processing products or by-products close to the supply source. Examples such as cheese processing (Agropur and Crystal Springs Cheese), potato processing (McCain's), etc., are prime examples of agri-businesses operating in the County. A prime factor in locating these industries, in addition to proximity to source/supply and major transportation networks, is access to a municipal water source that can provide the volume of water needed for processing. Depending on the processing business, access to a suitable sewage treatment system may also be important. It is noted in the 'Growth Strategy' section in this report, that agribusiness industry is not specifically singled-out, but is included in the general description category of "industrial" land use.

5.2 Classification of Industry Land Use Types

The previous land analysis identified various types of industrial and commercial developments that have been occurring in the County, and include the following six general categories:

1. Isolated Agriculture Related Industry
2. Resource Extraction or Point Source Industry
3. Home Occupations
4. Hamlet Industrial or Commercial
5. Isolated Industrial or Rural Commercial
6. Clustered or Grouped Industrial or Commercial

5.2.1 Isolated Agriculture Related Industry

These types of uses are listed as discretionary land uses within the Rural Agriculture land use district of the Land Use Bylaw and may occur without the need to redesignate the parcel. Typically, these include uses associated with agricultural activity, such as seed processing facilities, garden markets, feed mills, etc., and they may establish anywhere in the County. Some more intense uses are required to redesignate to an appropriate industrial land use district. These are important secondary industries to agriculture and should be permitted to continue on a site-specific basis.

5.2.2 Resource Extraction or Point Source Industry

Resource extraction uses are difficult to predict where or what frequency they may occur, as they are very specific to the site of a desirable resource (e.g., gravel source) and are very dependent on market conditions for the resource. Thus, they are often dealt with in a reactionary basis by a municipality, with regard given to land use impacts, such as environmental considerations, impacts to neighboring uses, etc. Some uses, such as oil and gas activity, are also under the jurisdiction of the provincial government to regulate. Thus, these uses will continue to operate throughout all areas of Lethbridge County, and the latest Land Use Bylaw (Bylaw No. 1404) was updated to better manage, where possible at the local government level, many of these types of uses.

5.2.3 Home Occupations

Home Occupations are found to be located all over the County, but the majority are closer to the City of Lethbridge where more residential development occurs. This category of land use includes a wide diversity of businesses, such as a home office, while others are more intense such as welding shops, automotive/machinery repair, etc. Many are related to servicing the agricultural producers in an area. Between the years 2013 and 2021, 102 development permits were issued for home occupations (16.5 per year average). This is above what had been previously observed where there was 12% of development permit were issued for home occupations. This could be due to the updates in the Land Use Bylaw No. 1404 which broadened the scope of home occupations allowing for more employees on the site, along with limited outdoor storage and commercial vehicles. This is important as many of these smaller scale home-based developments are in the business 'incubate' stage and may eventually grow and expand into industrial parks in the County. These types of uses should continue to be allowed wherever deemed appropriate, with the County reviewing and monitoring their success or constraints over time, wherever

possible. At some point in future time, some uses that have grown or need to expand should be encouraged to relocate to established industrial areas.

5.2.4 Hamlet Industrial or Commercial

As noted, the majority of hamlets are largely residential in nature and approvals of industrial uses have, in the past, met with some opposition and complaints from residents. Based on historical trends, it is foreseen that except for perhaps a couple of hamlets that may experience interest in additional industrial/commercial development, such as on lands adjacent to highways, the majority will experience slower growth and cater to a more local service area, either to the urban residents or agricultural producers in the general area. Most future new growth will likely occur adjacent to areas or parcels already designated for such uses. Any industrial uses approved within a designated hamlet should be compatible with existing development.

To expand the hamlet industrial/commercial land base, additional studies on expansions to hamlet infrastructure services and capacities may need to occur. Thus, except for some general areas described, the majority of potential hamlet industrial/commercial land use considerations should be addressed in subsequent hamlet growth studies, as previously identified by Lethbridge County as a future planning exercise.

This study and land use emphasis is to primarily highlight the following two land uses as the main focus of Lethbridge County's strategy.

5.2.5 Isolated Industrial or Rural Commercial

These types of land uses may be found in all areas of the municipality. They are often very site specific, depending on the use or needs of the business. Examples are McCain Foods located adjacent to the Hamlet of Chin or the Corteva facility on the south side of Highway 3 on the Lethbridge County-Coaldale highway corridor. Often siting criteria is based on proximity to suppliers/producers, proximity to major transportation corridors, availability of required size of raw-land parcel, availability of servicing for the need, and price of the land. Rural commercial uses are typically very dependent on being adjacent to a highway, have good access available to the highway, high traffic volumes present, and the availability of water. These are more difficult to preplan locations for, as often the business is very specific in their needs, and it is very dependent on the developer's ability to negotiate the purchase of the land.

Some areas may be predetermined as being acceptable, such as near major intersections of transportation corridors; however, others will need to be reviewed on a site-specific basis and on the merits of the proposal. Lethbridge County should continue to allow for these opportunities, but the management of such may primarily need to be accomplished through the application of general land use and siting criteria to guide decision makers as well as prospective developers in locating suitable sites. General land use and siting criteria for isolated commercial and industrial uses that may be considered are outlined in the next section.

Alternative energy developments, such as wind or solar farms, may also be categorized as isolated industrial developments. These are very dependent on the availability of large parcels of unfragmented land, proximity to transmission lines, capacity in the system, and little conflict with other land uses, including irrigation systems.

5.2.6 Clustered or Grouped Industrial or Commercial

The primary focus of this study and accompanying strategy is to identify and appropriately plan for well managed industrial and commercial uses, as located in clustered or grouped business parks. As identified, seven such formal and established sites presently exist within Lethbridge County. The strategy will attempt to focus business and industrial/commercial growth to strategic locations based on clustered/nodal development concepts, sensitivity and integration with the agricultural landscape, and adjacent land uses. Industrial localization and intensification optimize the industrial land potential by enabling more efficient servicing, takes advantage of existing infrastructure that may be present, uses land more efficiently, allows sites to achieve higher density forms, may facilitate new growth through the re-development of existing underutilized sites, and helps preserve agricultural land in other areas of the municipality.

5.3 Defining Land Use Criteria

A main purpose of the strategy is to identify and protect suitable land areas within the municipality that may appropriately be planned to accommodate industrial or commercial development growth, without impacting other existing uses or conflict with other County policies or goals. There will always be a certain level of potential conflict between industrial land uses and other uses, such as residential and sometimes agricultural; however, appropriate siting, design and spatial separation can help to mitigate many of these conflicts to a manageable degree. Identification of suitable lands to accommodate industrial/commercial growth is based on the following principles and criteria:

5.3.1 Isolated Industrial and Commercial Uses

Defined/located according to the following criteria:

- Strategic location of highway business based on proximity to highways, especially intersections and interchanges
- Direct to cut-off or poor quality agricultural lands wherever feasible
- The proposal compatibility with existing development and the land
- Higher quality agricultural lands should only be considered if they are parcels adjacent to major transportation corridors
- Availability of existing infrastructure/services
- Ability to obtain/install infrastructure/services
- Future considerations for the land and lands adjacent to them
- The potential to mitigate any negative impacts of the development

Additionally, for **commercial** uses the following should also be considered:

- Location should be based on service centre role, service being provided to the general public
- Parcels with visibility and frontage along highway a priority
- Ease of access to paved roads
- Recreational uses may be considered suitable commercial uses

5.3.2 Regional or Clustered Industrial and Commercial Uses (Business Parks)

Defined/located according to the following criteria:

- Existing policy areas
    - As identified in the Municipal Development Plan (MDP) and Intermunicipal Development Plans (IDPs)
    - Existing and designated industrial parks in accordance with the Land Use Bylaw (infill or expansion)
- Identification or expansion of lands based on principles of clustered/nodal development
- Market demand/ developer preference, as aligned with County policy directives and planning policies
- Possibility of access or proximity to rail
- Availability of existing infrastructure/services
- Ability to obtain/install infrastructure/services
- The potential to mitigate any negative impacts of the development at the location
- Future considerations for adjacent land uses
- Availability of suitable land (e.g. not susceptible to flooding, environmentally sensitive land, etc.)
- Land use does not conflict with other land uses or other County policies
- Close proximity or connection to the provincial highway network
- Connection to or ease of access to the local road network

In identifying and siting business park locations it is recognized that highway locations offer the following advantages:

- Transport savings – speed of transport brings economies in transport costs and saves time
- Visibility – allows prominent sites with exposure
- Semi-truck circulation – highways can readily accommodate the traffic of heavy trucks
- Traffic safety – less congestion with the public and other general vehicle traffic than within a higher density urban setting

Overall, as part of the strategy, identifying a number of industrial sites in a variety of locations instead of one large concentrated area is advantageous to:

- Provide a choice of business environments
- Avoid large concentrations of industrial traffic in one location
- Provide a variety of locations with different transport orientations, and some with rail access and some without
- Help limit potential off-site impacts by reducing the scale or concentration of development in one area

- Reduce transportation distances or costs for some businesses that need to be in a certain area or in proximity to a specific supply or market
- Enable more competitive land sales and market conditions
- Take advantage of symbiosis that may exist by associating with existing industrial users

5.4 Business Park and Layout Design

The establishment or expansion of industrial business parks or centres should be planned for and consider a wide variety of uses, but there are some basic trends or best practices/factors that should be considered. Many planning studies have indicated that warehousing and distribution activities rather than production facilities are easier to plan for and often are the dominant use in industrial parks. These activities do not typically generate nuisances (noise, odour and smoke), usually require less servicing such as water, and they are usually dependent on good access and ability to accommodate large truck traffic.

Commercial businesses may be located within industrial parks and provide a number of beneficial services but are much more dependent on water and sewer services. Depending on the size and location of the park, hotels, restaurants, and gas stations may be suitably located and planned in conjunction with industrial land use if they can be adequately serviced. Typically, these types of commercial uses are located at the entrance to the parks and adjacent to major transportation corridors.

The planning process for industrial areas should be ongoing and reviewed regularly. Improvements in transportation, shifts in tenant mix, technological advancements in providing services, technological changes in processing or communication, and other economic factors may modify the range of uses, the layout, the structures, and the function of the area. Also, special consideration is needed for promoting industrial growth adjacent to rail lines and in proximity to highway and municipal road crossings due to safety and traffic issues. Often, rail crossing protection infrastructure will need to be installed, which is typically done at the developer's expense.

5.4.1 Design Considerations

The establishment of new industrial business parks or the expansion of existing ones should be based on a cost effective and suitable design, in conjunction with servicing considerations. The industrial site should be effectively laid out for efficient road network considerations and the accommodation of storm water management. In designing and/or approving plans for the expansion or establishment of industrial parks, the following criteria should be considered at a minimum:

- A gridiron or modified-grid system layout is preferred, as planning and industrial land use studies indicate layouts which create a road network with square and rectangular parcels are best suited for industrial development and for warehouse use in particular (See figure 20).
- Lot depth is more important than lot width and a 200-foot depth is often not deep enough for yards that must accommodate semi-truck traffic. Thus, industrial parks should ideally be designed so parcels can have 300 to 400 feet minimum depth. Minimum site dimensions should be 200 feet of width and 300 feet of depth, and a minimum 500 feet of depth should be considered for parcels backing onto a highway.

- Designing square and rectangular parcels or 'blocks' no less than 12 - 20 acres in size offers flexibility, as one business may require a large site, but these blocks can also be further subdivided to accommodate small area users (e.g., 1 - 2 acres), if properly designed at the start.
- Property frontages should be landscaped, two-thirds of the area is a common standard, and storage in the rear only, parking and loading space should not permitted in the front yard. Parking should be limited to customers in the front yard and employee or main equipment inventory in the rear.
- Arterial or main business park roads should be designed at a minimum 30 m width, with a wider carriage way, instead of the traditional 20 m.
- There should be no dead-end roadways or small cul-de-sacs in the subdivisions. For growth areas, future access and connectivity to adjacent lands that may also be developed must be considered.
- A Floor Area Ratio (FAR) of 0.50 is encouraged (i.e., this relates to site coverage), as this assures sufficient space for parking, loading, and unloading facilities without using public streets, and encourages the reservation of additional land for future facility expansion.
- Mixed-use (both vertical and horizontal) should be encouraged – office space above buildings, multi-use or lease bays, condominium plans.
- If commercial sites are included, they should ideally be placed at the entrance of the subdivision or business park.
- Best environmental practices for industrial development, like those espoused in the Efficient Use of Land Implementation Tools Compendium published by the Government of Alberta, should be incorporated wherever feasible. These include clustering the layout of buildings to minimize the development footprint and total surface area required for roads, utilizing joint logistics facilities and on-site amenity spaces, integrating technology that reduces the dependency on raw materials by enabling the reuse of by-products and waste materials within the industrial park, designing wetlands as part of the storm water management system, reusing water where possible and incorporating recreational opportunities in green space or buffer areas.
- The layout and design of the business park should be based on best siting and engineering practices and consideration of the topography of the land, with storm water management containment systems sited in the logical catchment area and be designed to accommodate expansion if required.
- Area structure plans should be designed to allow for logical phasing of subdivision or development.

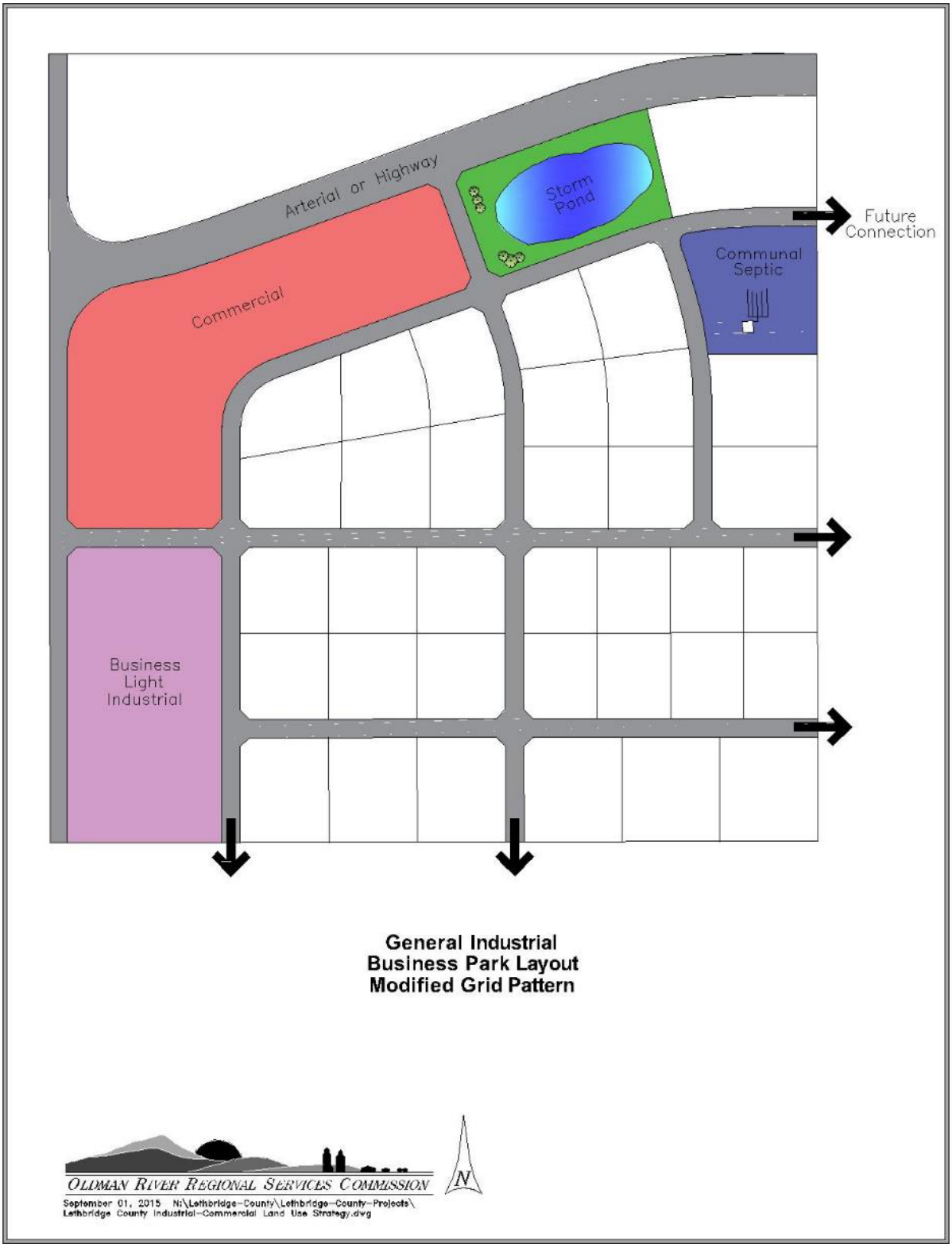
Highway Issues – For proposals in proximity to highways, Alberta Transportation will need to be consulted and the department's requirements taken into consideration as it is the approval authority relating to access on the highway and manages control over how development and traffic may impact the integrity of the highway system. Alberta Transportation's mandate, under the Highways Development and Protection Act, is to facilitate a practical network of safe transportation routes in the province. Access management strategies will need to be considered as part of the additional planning and design of business parks. ASPs within referral distances that require circulation to Alberta Transportation should be considered for Ministerial approval prior to redesignation.

With respect to safety, the number and the physical design of access points onto primary highways are major concerns. These factors are considered by Alberta Transportation when subdivision and

development occur within 300 m (1,000 feet) of a highway. Roadside permit approvals are also required from the department for any development within the right-of-way or within 300 metres beyond the limit of the highway or within 800 metres from the centre point of the intersection of the highway and another highway. In order to satisfy the department's goal of supplying safe transportation, Alberta Transportation will consider minimizing the number of access points onto the highway by closing existing intersections of municipal roads onto the highway as it determines necessary.

Rail-line Considerations – Developments desiring rural service for spur-trackage must conform to the requirements of the CPR. Thus, close contact with rail company officials is desirable throughout any process of planning for access to trackage. Consideration of setbacks and potential impacts of industry adjacent to the safe operation of the rail line should also be taken into consideration. The County's land use bylaw contains setback standards based on the *Guidelines for the Federation of Canadian Municipalities for Development Adjacent to CPR Lands.*

Figure 20: General Industrial Business Park Layout Modified Grid Pattern



5.4.2 Servicing Considerations

The availability of servicing, or the potential to feasibly service, are important considerations in the planning for efficient industrial-commercial growth areas. Thus, a strategy that involves expanding existing business park areas or clustering development in specific areas offers a number of advantages including at the very least, the ability to take advantage of existing infrastructure or expand existing systems rather than develop all new. This enables efficiencies and economies of scale with less roads and pipe, less infrastructure to maintain and manage, etc. The installation of services for a business park should be completed up-front before individual lots are sold and is typically provided at the expense of the developer and constructed to municipal standards.

Sewage Treatment

Without a municipal piping and treatment sewage facility, there are a number of viable options available for industry and the County to consider. On-site individual septic treatment systems may be used for isolated industries or low volume waste/effluent producers with a 2.0-acre minimum lot size. To potentially reduce the lot size, other technologically advanced septic systems which have been proven to be more efficient may be considered such as the "FAST system" (Fixed Activated Sludge Treatment) process to treat and denitrify wastewater, or a "Small Bore Sanitary Sewer System (SBS)" in which a clarifier tank is located on each lot.

For grouped industrial/ business parks, it may be more ideal for the County to encourage communal/municipal treatment systems which may be implemented in a variety of forms (e.g., leach field, mound system, lagoons, aerobic digesters, etc.) with the County ultimately taking control of the infrastructure. Also, a business eco-park plan may be designed to employ an alternative wastewater system that will utilize wetlands as part of the process. Depending on the industry, some businesses may also capture and reuse some processing water as part of their internal system which reduces the ultimate volume of wastewater produced which leaves the plant.

Water

Water is needed to service industrial-commercial developments, but the amount will vary to different degrees of need and volume. Some businesses are very low volume users and only require it for a staff /coffee room and washroom facilities for employees, while others require larger volumes for processing or manufacturing. As the County does not have its own water treatment facility, the growth of industrial or commercial land use is quite dependent on the County obtaining and delivering water, entering into agreements for treatment of the County's water (under its own water license), or planning for uses which require limited water supply. There may also be opportunity for considering raw water delivery through agreements with the irrigation districts. This may be utilized in business parks in conjunction with dual piping systems required for buildings, or eventual package water treatment plants being constructed. The County has been looking a developing a water strategy to provide guidance with regards to water needs for all types of development within the County.

Fire Protection

A method of providing fire protection will need to be considered in the design of business parks. Historically, this has been provided in the form of a dugout or fire pond for the subdivision. Often in County rural subdivisions, a dry hydrant has been required to be installed in the pond. Access to water and availability on a year-round basis is required for adequate fire protection, and therefore, depending on dugouts can be problematic. Some businesses install sprinkler systems in buildings as part of their

safety system, but such infrastructure does not help with fires external to the building or property. Often, a fire pond properly engineered and designed in combination with the storm water management (pond) system is effective for serving this purpose. Thus, the provision of water needs to be addressed in conjunction with the fire suppression needs of an isolated industrial/commercial development or the overall design of a new or expanding business park.

Land use siting practices should also be implemented for the proper siting and separation of more volatile or hazardous industries (e.g., processing chemicals, fertilizers, fuels), from other types of land uses.

Storm Water Management

The management of storm water drainage must be addressed as part of the planning process. Engineered storm water management plans will be required at the area structure plan stage, or in some cases subdivision or development stages for isolated developments. Traditionally, it has been the developer who has been responsible for providing the engineers report and obtaining any Alberta Environment approvals. In some cases, the overall strategy will need to align with larger County storm water management initiatives, such as the Malloy Drainage Basin Master Plan. The County should encourage, wherever practicable, combining storm management ponds with fire supply methods. Additionally, encouraging low impact design principles, such as developing more natural wetland systems, should also be considered if feasible.

5.5 Land Use Assumptions and Projections

5.5.1 Land Demand

Forecasting land demand is a difficult exercise for rural municipalities and may be somewhat limited in value because of:

- inaccuracy of calculations,
- the large amount of land available gives considerable flexibility,
- fluctuating economic conditions,
- lands usually not serviced can usually be brought on stream relatively quickly.

Cities often forecast general industrial development growth based on a ratio of square feet of industrial floor space per capita. In many Western Canadian municipalities, this ratio appears to be between 95 - 110 square feet, while smaller population centres have an industrial floor space of 80 - 90 square feet per capita respectively. Making such forecasts on this method is difficult for a rural municipality, as industry activity is not directly related to local population. Also, basing it on previous annual average growth rates for general industrial development based on square feet of industrial building space is difficult for the County since it has not been recorded or tracked in the past.

Big-box commercial development typically requires large vacant tracts of relatively inexpensive, serviced land that is located along major transportation arteries and is easily accessible from major highways. Thus, some areas of the County would be suitable strictly on parcel size, price and possible location. However, it is unlikely significant commercial development would occur outside of the urban boundaries, especially the city, due to lower population densities, distance to market clientele, and the lack of availability of adequate services.

Overall, the anticipated amount of retail/service commercial development that can be expected in the County is low based on past trends and servicing constraints. Water and sewer servicing to surrounding City of Lethbridge municipalities (i.e., Coaldale, Lethbridge County, Coalhurst, etc.) is also provided and controlled by the city through various agreements.

The amount of light-industrial/commercial type land use (e.g. shop buildings, trade contractors, equipment service and sales) has traditionally been somewhat higher than industrial processing/manufacturing uses. This trend will likely continue into the foreseeable future. The agri-business and bio-industrial sectors continue to grow and are compatible rural industrial land uses. Parcels or areas located within 10 km of the city appear to be most desirable based on past trends and data analysis.

5.5.2 Land Projections

The preparation of land use projections and forecasting likely industrial-commercial land demand for Lethbridge County is based on the analysis of past data and some assumptions about the future.

- In order to give some impression of likely land consumption, it may be assumed that 27 development permits per year on average may be approved. This represents the average number of industrial-commercial permits approved yearly between 2013 and 2021. Based on the data analysis it appears the average (median) use occupies 5.0 acres, but the range varies widely, with half being 3.0 acres or less. Applying the range of sizes to the 27 permits and averaging the total yields is a simplistic approach, however, using this method the County may expect 80 - 100 acres of land consumption, on average, for industrial and commercial uses per year.
- The 80 - 100 acres figure comprises both isolated uses and the uses that established in the designated industrial parks. Thus, in examining the data and separating the percentages of isolated development (49%) and designated/grouped development (51%), it appears that 40 - 50 acres may be anticipated per year within designated industrial business park areas based on previous data trends. This is dependent on the scenario that the vacant land is actually available in the various business parks.
- Planning for available land should consider situating it in a number of locations rather than one location only, to assist with market choices and locational factors. Thus, slightly more land than what actually may be developed on a yearly basis needs to be considered overall as part of the planning and economic strategy.
- In the future, the percentage of industrial-commercial land likely to be in designated business parks should stay consistent in relation to the percentage of isolated uses, as the County is actively promoting and encouraging both types of development to establish.
- For business park growth activity, it is anticipated that the build-out of Stewart Siding area, Taylor Business Park and the new Chinook (Frontier) Business parks with vacant land supplies available will be the areas of preferred interest in the foreseeable future.
- Broxburn Business Park is substantially completed but there will likely continue to be interest in the Highway 3 Lethbridge-Coaldale Corridor and Broxburn area for development due to the advantages of existing transportation systems and synergy opportunities, the close proximity to the City of Lethbridge. Therefore, long-term protection and planning of lands identified for potential future industrial-commercial growth should be respected and the Highway 3 Corridor area should remain a 'priority' growth area for Lethbridge County and not compromised.

- Slightly more land than what is typically developed in a year should be available to prospective business interests, as it takes time to plan for, obtain necessary approvals, subdivide and service land and it cannot be brought to market in a short time frame. A two-to-three year land acreage inventory may be considered reasonable.

As part of the strategy the County should try to ensure there is continually available an overall minimum of 70 - 80 acres of readily accessible land amongst the various business parks to accommodate development. This estimated amount of land should only be used as a target amount and with closer monitoring over time, better estimates can be made in the future. If more isolated industrial parcels are being developed over the next few years, this figure may be slightly lower.

5.6 Growth and Expansion Areas

5.6.1 Agricultural Land Considerations

From the provincial South Saskatchewan Regional Plan land use strategies through to the local Land Use Bylaw and Municipal Development Plan, protection of agricultural land is a priority. Agriculture, although it has a changing role, is still the major use and economic driver of the County. It still needs to be considered as a primary use and in all decisions must be protected as best possible from other uses that may conflict or unnecessarily remove land from production. Although most of the soils within the growth areas are considered fertile, the majority of the entire undeveloped area, if properly managed, represents good quality productive agricultural land. The Irrigation Districts (LNID and SMRID) administer irrigation in much of the areas encompassed by the growth strategy and many parcels have irrigation or water rights.

The bylaws allow industrial and commercial uses on better-quality land if deemed appropriate, however, a balance is required and may be difficult to achieve. An industrial/commercial policy should take into account land quality and wherever possible to direct uses to poorer-quality lands. However, a goal of the strategy is that by encouraging and clustering development to specific areas, and in particular by promoting the expansion of non-agricultural development in existing industrial areas, agricultural land in other areas of the County will be preserved from being removed from production and being converted to other uses. Both infill and expansion wherever feasible and logical, should be a high priority.

5.6.2 Overview – Primary Growth Areas

It is noted that as part of the growth strategy, access to or the availability of water is not the highest locational factor consideration due to present conditions within Lethbridge County. Treated water is currently limited to specific areas or existing developments, and the County is somewhat dependent on existing agreements with urban neighbors as the County has no treatment facility of its own. So overall, any growth area(s) identified, will require a water delivery strategy or will be restricted to accommodating low volume water users only. Sewage is not as major of constraint, as treatment can be handled through various means as identified earlier in this report, including on-site individual treatment systems for low volume producers, lagoon systems, package sewage treatment plants, or communal systems.

As in the past, it is suggested that in the future industrial and commercial uses will locate in:

- hamlet areas, as appropriately planned for;

- isolated uses located in the general rural areas, as deemed suitable; and
- designated grouped or clustered industrial/commercial areas, both existing and new.

It is anticipated that in moving forward, the majority of industrial-commercial uses will be located in designated business parks. The primary focus of the land use strategy will be to appropriately plan for and manage industrial/commercial growth in designed and designated grouped or clustered areas.

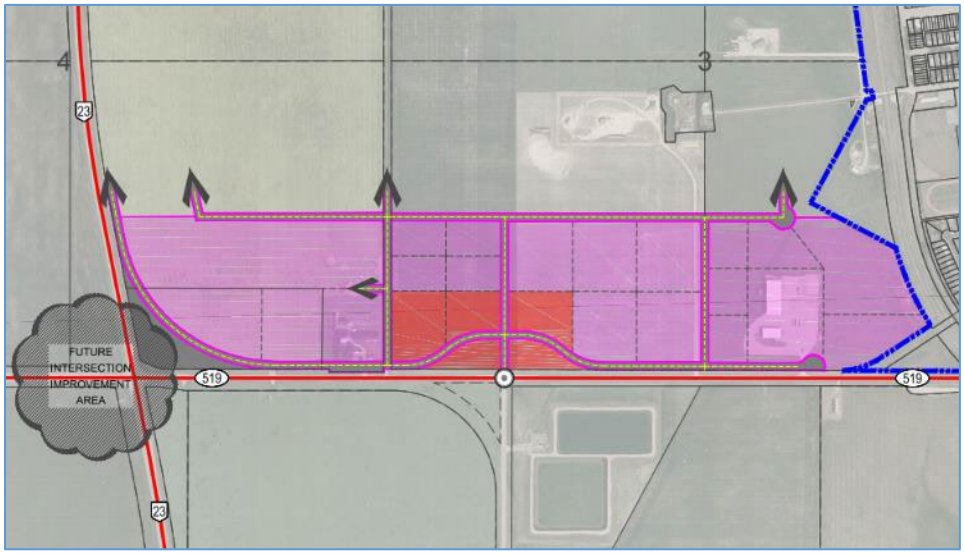
5.6.3 Areas Identified in IDPs

The County has completed Intermunicipal Development Plans with all if its urban neighbors. In some of the plans, areas have been identified in the agreements where the County may grow and develop land for non-agricultural purposes. It is of importance to note that although these areas have been identified, little additional planning, engineering or subdivision work has occurred in these areas to make them turn-key ready for business.

Nobleford West Area

The 2012 Intermunicipal Development Plan between the County and the Village of Nobleford identified an area west of the village that could be planned and utilized for industrial-commercial development. The area is bordered on the west by Highway 23, on the south by Highway 519, on the east by the CPR and the village. This area is highly visible, has good access to major transportation routes (both highway and rail) and nearby access to municipal services such as water and sanitary sewer that may be extended from the village in the future (if agreed to and available). There are presently several commercial/agri-business operations located within this area. Both municipalities agreed that the acceptable types of uses for the corridor are highway commercial type businesses and/or business/light industrial uses. Approximately 140 acres of undeveloped could be planned for additional non-agricultural land use development, with potential future growth lands also available to the north. In accordance with the IDP, an Area Structure Plan (ASP) would be needed to be prepared and an addendum Traffic Impact Assessment that should include approval of the Minister of Transportation as well as the County prior to the redesignation of any parcel of land.

Figure 21



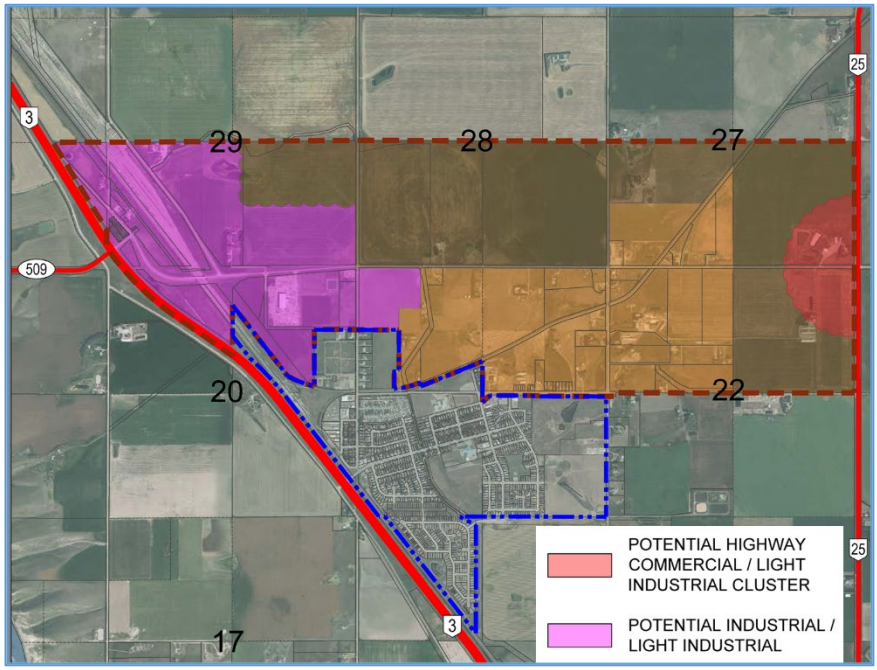
Coalhurst North-Kipp Road Area and Highway 25 Area

The 2014 Intermunicipal Development Plan between the County and the Town of Coalhurst identified areas around Coalhurst that could be planned for County industrial-commercial uses. Primarily, the IDP identified the western portion, north of the town and adjacent to the CPR rail-line, as the focus for industrial type uses. The west portion of this area is identified as suitable for industrial type land uses, as there are a number of such uses already established in the area. It has convenient access to major transportation routes (both highway, local pavement and rail) and the area south of the Kipp Road is in proximity to municipal services such as water and sanitary sewer that may have the potential to be extended in the future when feasible (if agreed to and available).

In 2020 the Town of Coalhurst and Lethbridge County approved the North Coalhurst – Kipp Area Structure Plan which provides details on the future development of this area and the provision of services. The Plan divides the area into two main sections, with the area north of Kipp Road being unserviced industrial lots that would be to a rural standard and the area south of Kipp Road being an area were servicing may be put in if feasible and more urban style development would be constructed.

As well, approximately 60 – 70 acres of land adjacent to the Kipp Road and Highway 25 intersection is identified for potential commercial/light industrial use (see Diagram 1 and Figure 22). The types of uses deemed appropriate will be dependent on servicing capabilities/constraints. It should be noted that the development of this cluster would be based on a more detailed land use concept that would require the development of a paralleling or internal service road off Highway 25 from the Kipp Road. Similarly, to the Nobleford IDP area situation, any future large scale or multi-lot development in the Coalhurst area is subject to future planning and engineering work as undertaken in the preparation of an ASP, as the land is presently undeveloped and primarily used for agriculture.

Figure 22



Picture Butte East Area

The County and Town of Picture Butte started the discussions to prepare an IDP in 2014 and the IDP was ultimately adopted in May 2018. The IDP identified areas that may be suitable for different types of land use and development. Planning Area 1 in the IDP encompasses a stretch of lands along the west of the Town as well as a significant extent of surrounding lands located in the County. The potential for highway commercial uses is earmarked in Planning Area 1A (north of Highway 25) and Planning Area 1B (south of Highway 25), both of which are within the County. IDP policy observes that these areas (see figure 23a) may be well suited for the development of highway commercial as an intermunicipal joint venture. An area east of the Town, depicted as Planning Area 4 in the IDP, is identified as a suitable location for industrial-commercial growth on account of its adjacency to the Town's existing industrial area as well as its convenient access to Highway 519, a major transportation route. The IDP envisions predominantly industrial and light-industrial uses for Planning Area 4, with some possibility for highway commercial uses on land fronting Highway 519. Highway commercial is also contemplated in a portion of Planning Area 3A, which is situated west of Planning Area 4 and south of Highway 519 (see figure 23b). Development in Planning Area 4 is projected to occur incrementally, with lands furthest from the Town earmarked as an Agriculture Holding Area. The County's financial contribution to the existing improvements along Factory Drive that were completed in 2011 is a preliminary gesture toward an equitable, shared vision for growth and economic development that sets the stage for a potential joint business park venture in partnership with the Town.

Figure 23a

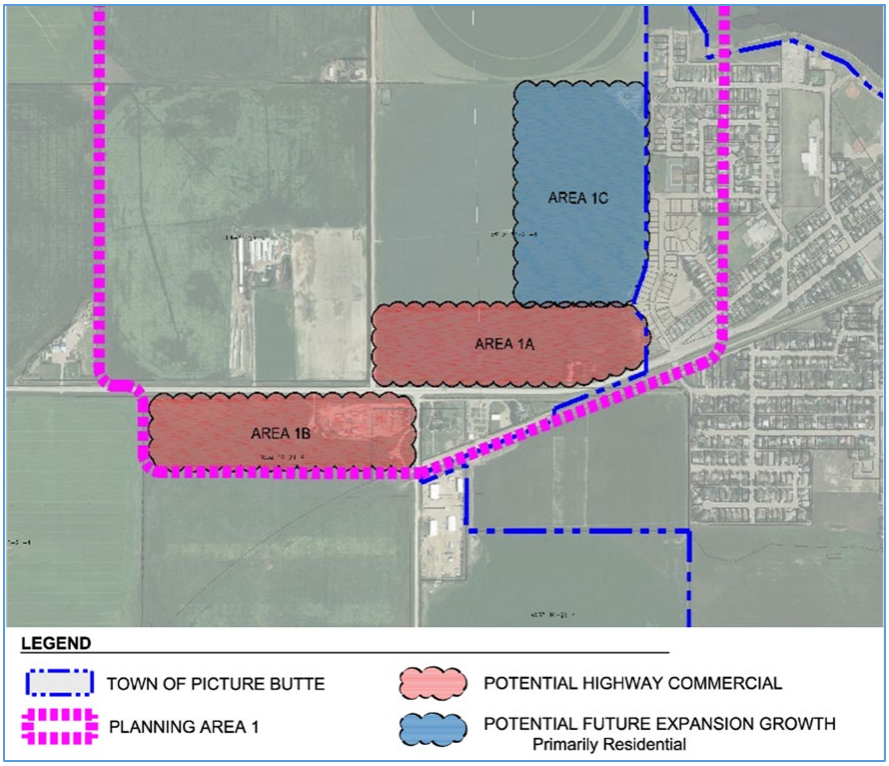
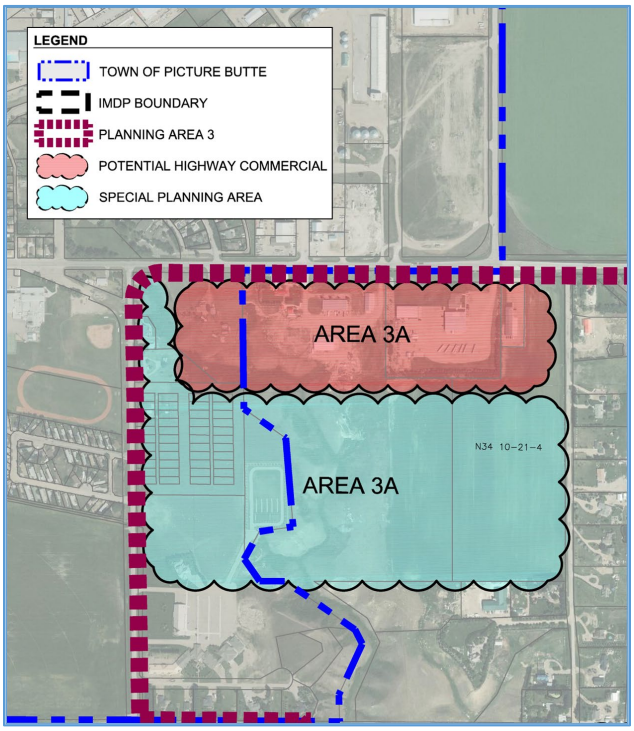
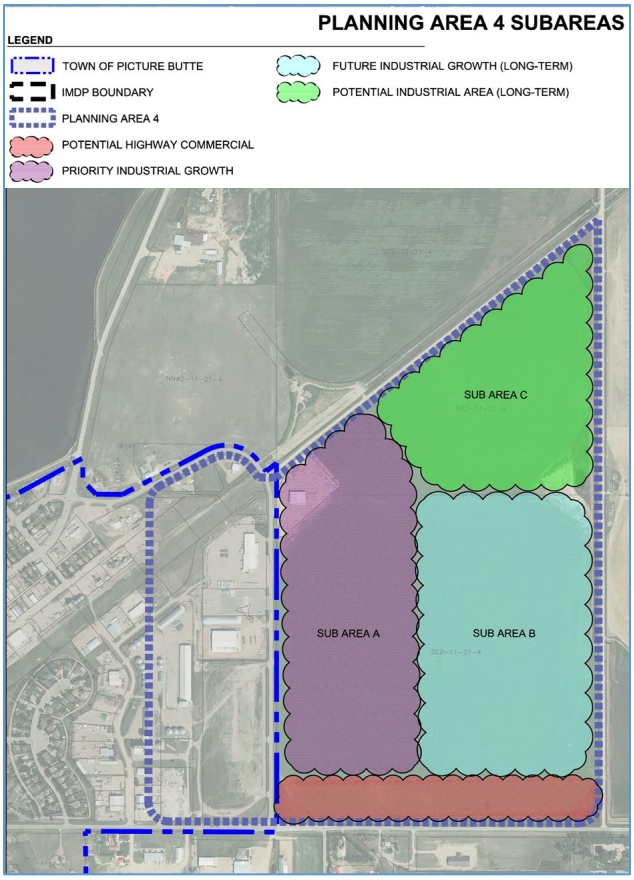


Figure 23b

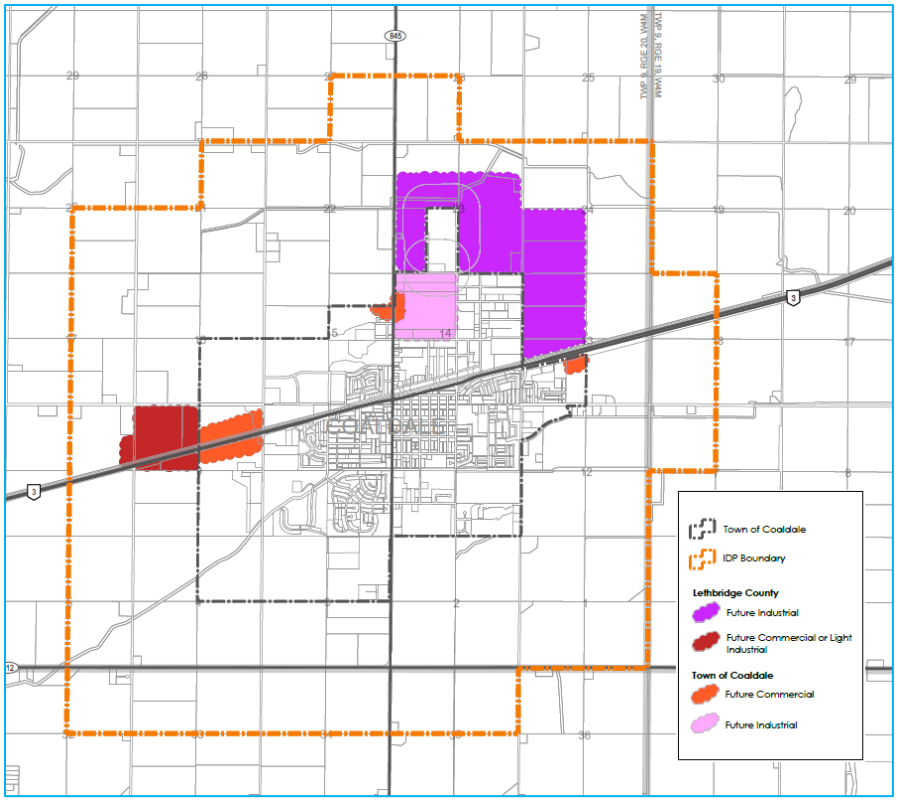

LEGEND
TOWN OF PICTURE BUTTE
IMDP BOUNDARY
PLANNING AREA 3
POTENTIAL HIGHWAY COMMERCIAL
SPECIAL PLANNING AREA
AREA 3A
AREA 3A
N34 10-21-4


PLANNING AREA 4 SUBAREAS
LEGEND
TOWN OF PICTURE BUTTE
IMDP BOUNDARY
PLANNING AREA 4
POTENTIAL HIGHWAY COMMERCIAL
PRIORITY INDUSTRIAL GROWTH
FUTURE INDUSTRIAL GROWTH (LONG-TERM)
POTENTIAL INDUSTRIAL AREA (LONG-TERM)
SUB AREA C
SUB AREA A
SUB AREA B

Coaldale Fringe Area

As part of the Intermunicipal Development Plan with the Town of Coaldale areas along Highway 3 and north-east of the town have been designated for future industrial/commercial uses. These areas align with the industrial/commercial development proposed within the Town of Coaldale.

Figure 24



5.6.4 CANAMEX Interchanges

Highway 843 (43 Street North)

- **Highway Commercial Cluster (see diagram 2)**

As part of the long-term growth strategy, the area around or in proximity to the future CANAMEX service interchange northeast of the City of Lethbridge, north-end of 43 Street (Highway 843), may be considered for a future commercial (highway commercial) land use cluster. The planning for such is subject to discussions with City of Lethbridge which have been taking place in the form of updating the IDP between the two municipalities. The City has also expressed some interest in development in this area. The issues of servicing, connectivity between uses and municipal jurisdictions, long-term planning, the detailed design plans and the time-frame of the provincial government in constructing the CANAMEX will need to be addressed. As a result, the questions of how much land, exactly where, and how the land may be developed are long-term planning considerations. In the interim, this interchange area should be reserved for future commercial type use and protected from significant fragmentation or incompatible land uses being allowed.

Highway 25 Interchange

- **Highway Commercial Cluster**
  (see diagram 3)

Similar to the previous identified area, the land around or in proximity to the future CANAMEX service interchange north of the City of Lethbridge on Highway 25 may also be considered for a future commercial (highway commercial) land use cluster. Correspondingly, the issues of being dependent on the provincial government to complete the detailed design plans and determining the time frame to actually construct the CANAMEX will factor into planning for and allowing land use in proximity. How much land, exactly where, and how the land may be serviced and developed are long-term planning considerations. It is anticipated that due to locational factors, this would likely be a smaller area and take longer to develop than the 43 Street (Highway 843) area. However once again, in the interim this interchange area should be reserved and considered for future highway commercial type land uses as being considered the most desirable land uses.

5.6.5 Grouped/Clustered Industrial-Commercial Areas

The areas identified for future industrial-commercial growth as types of grouped or clustered land use developments consist of primarily expansions to existing industrial business parks, along with some new areas which are in close proximity to the existing parks. As part of the land use and growth strategy, the diagrams depict and refer to three categories of growth lands: 'Priority – Initial', 'Successive – Secondary', and 'Prospective – Future'. The rationale for this three-tier approach is to identify the most logical areas that may be suitable for accommodating initial industrial-commercial development growth in the near future, and to protect long-term growth lands in the immediate vicinity in respect of the clustering/expansion land use planning concepts. Generally, the three-tier categories radiate out from the existing "core" built-up area. The 'Priority – Initial' areas are lands that are adjacent to existing designated industrial lands and may potentially connect to the existing road network and other infrastructure. They logically should be the first or primary areas to be developed. The 'Prospective – Future' growth areas are in consideration of very long-term growth in the County and should remain as agricultural lands until such time they may be needed. These long-term areas identified should not be converted to other incompatible land uses, such as grouped country residential, and an attempt should be made to keep them as unfragmented as possible.

It is important to note, that although the growth strategy identifies the three-tier categories for growth lands, they do not necessarily have to be strictly developed in this manner and the reference is to act more as a plausible guide. As the County moves forward in the process and consults with landowners and developers, land categorized as 'Successive – Secondary' or 'Prospective – Future' may actually be developed earlier (or even before Priority – Initial' lands), as some land owners may choose not to be involved in the land development process, or servicing issues/opportunities may evolve that may make one area more advantageous to develop over another. Thus, a practice of exercising flexibility with respect to a managed growth approach should be employed when possible.

RAVE Industrial Park - NW 3-9-21-W4 and SW 10-9-21-W4

(see diagram 4)

The RAVE Industrial Park is fully developed with the exception of possibly minor infill, and any growth would logically occur to the north, on the east side of 43 Street. There is potentially 2.0-acres available for new development and re-development in the existing RAVE Industrial Park. The north is an ideal area

to expand (into SW 10-9-21-W4) as it is compatible with the adjacent land use and an area structure plan has now been prepared (refer to next section on Chinook). The City has indicated that potable water can be accessed but that any additional sewer hook-ups are unlikely due to a capacity issue.

Chinook Industrial Park
(see diagram 4)

This area has been identified in the Lethbridge County/City of Lethbridge IDP as a Lethbridge County Growth Node. An Area Structure Plan for the 202.25 acres comprising Chinook Industrial Park (recently marketed as Frontier Business Park) was created and approved by County Council in 2018. A 38.08-acre phase at the south end of has been developed, along with a 10.77 acres developed for a storm water management pond. It is anticipated that the remaining 164.17 acres will be developed in as many as three additional phases, with development occurring south to north. This area will not be serviced by City wastewater but there is an opportunity to request City potable water for non-intensive water use only.

Duncan Airport Industrial Park – SW 10-8-21-W4, E½ 9-8-21-W4 and NW 10-8-21-W4

(see diagrams 5 & 6)

The Duncan Airport Industrial Park (east side of Highway 5) is approximately 80% developed out. Some business or land owners are only utilizing a portion of their lot, and some own the adjacent one or two titles, which may accommodate future expansion plans. There may be some infill development potential if some of the large lots were resubdivided, and presently there is approximately 23 acres of undeveloped land that could be made available for development, if the landowners are willing to sell.

This area has been identified in the Lethbridge County/City of Lethbridge IDP as a Lethbridge County Growth Node. An initial 73.93 acres (Priority - Initial) immediately north could developed, and 84.21 acres (Successive - Secondary) across from the airport adjacent to Highway 5 with some potential for Highway Commercial use. A long-term area to protect for future growth (Prospective – Future) contains approximately 107 acres. This industrial area is unserviced, and if water services in particular cannot be provided, this area will likely experience slower growth and would cater to less intense, storage type uses. To expand Duncan Industrial Park, an area structure plan, with servicing, drainage and a transportation/access strategy being addressed, would need to be prepared.

Lethbridge Airport Infill and Expansion

The Lethbridge Airport (adjacent to Highway 5) is owned and operated by the City of Lethbridge and contains commercial lands for lease. The County transferred ownership of the Airport to the City in 2018 and it is anticipated that the City will request to annex in the airport lands into the City at some point in the future. Upon annexation these lands will no longer be available to Lethbridge County to support economic development and business growth.

Stewart Siding – Section 23-8-21-W4

(see diagram 7)

Stewart Siding (east and south of the City of Lethbridge on Highway 4) is approximately 68% developed. This area has been identified in the Lethbridge County/City of Lethbridge IDP as a Lethbridge County Growth Node. In addition to the 32.85 acres of potential infill and 31.26 acres (SW 23-8-21-W4) already designated as RGI and as illustrated on Diagram 7 as “Priority – Initial”, another 39.27 acres has been identified for future expansion into the NW 23-8-21-W4 (Successive - Secondary). To the west of this is 54.88 acres of land which fronts onto the County road allowance on the boundary with the City of

Lethbridge, identified as a "Prospective – Future" growth area. After this, Stewart Siding would effectively be developed out, as no additional adjacent land is available for expansion due to many physical constraints including the SMRID canal, CPR rail-line, Highway 4, location of City of Lethbridge municipal boundary, and acreage development to the south.

This industrial area is unserviced and it has also experienced some public perception issues in the past with a number of unsightly premises. This business park is in good location but would benefit from applying and enforcing development standards in the future. Also, if secure water servicing cannot be provided, this area will likely continue to cater to less intense, shop building and storage type uses. To expand Stewart Siding, an updated area structure plan with servicing, drainage and an internal road network/access strategy being addressed, would need to be prepared.

Broxburn Area – Highway 3 Coaldale Corridor

(see diagrams 8 – 9)

Broxburn Business Park and Corridor Area

The Broxburn Business Park (NE¼ 1-9-21-W4), adjacent to east-bound lanes of Highway 3 between Lethbridge and Coaldale, has experienced both good interest and growth. Approximately 90% of the lots have been sold and close to 80% have either been developed or are planning to do so in the near future. At the time of this report, 20.43 acres of land is currently vacant, but many of those parcels have development/building plans being formalized for them.

Having been identified in the Integrated Development Strategy and in the IDP update discussions with the City as a commercial-industrial area with unique capacity to support economic development, the Highway 3 Corridor should be a 'priority' growth area for the County. This is a logical area for growth due to many factors: existing area transportation networks, intersection improvements being installed at Highway 3 & Broxburn Road, future CANAMEX and interchange plans, number of fragmented parcels, proximity to two urban centres, and opportunities for enhancement of servicing, storm water management, and the symbiosis of industry.

The Integrated Development Strategy (see diagram 8) identifies 155.58 acres to the immediate south and east of Broxburn Business Park as 'Priority – Initial' growth lands, 68.08 acres as 'Successive – Secondary', and 249.74 acres as 'Prospective – Future'. Generally, the three-tier categories radiate out from the existing "core" built-up area. The 'Priority – Initial' areas are lands that are adjacent to existing designated industrial lands and may potentially connect to the existing road network and other infrastructure. The growth lands identified should not be converted to other incompatible land uses and an attempt should be made to keep them as unfragmented as possible for future planning. As stated previously, that although the growth strategy identifies the three-tier categories for growth lands, they do not necessarily have to be strictly developed in this manner. Some land owners may not want to participate or be included in the process. (It must also be noted that the total acreage identified is a raw land number and the actual acreage that may be available for development would be smaller, as some land may have development constraints and between 20 -30% may be utilized for roads, utility right-of-ways, and other infrastructure, such as storm water management systems and fire ponds.) The *Integrated Development Strategy* identified approximately 150 acres of land adjacent to the proposed CANAMEX as a future storm water management area.

To the east and north east of the future CANAMEX and Highway 3 interchange, lands have been identified for future commercial or light industrial type use. The actual area available may likely not be determined

until the detailed design plans for the CANAMEX have been finalized. However, on the north side of Highway 3 approximately 20 acres of the 51.86 acres identified has already started to be developed. There is also 78.97 acres located immediately south of Broxburn Business Park identified as a potential "Prospective – Future" growth area. This land would have to be carefully planned, likely with more business light industrial and commercial type use, as there is a grouped country residential subdivision located to the immediate west.

Railside Business Park
(see diagram 8)

A conceptual design scheme was provided in 2016 in support of the redesignation that expanded the Railside Business Park, but it did not fully address all future considerations of what the land may ultimately become and be used for. However, the County may request additional details, engineering and information be provided at future proposal stages, including both development and subdivision. The County may also require a more detailed area structure plan be provide at future subdivision stages to also address this aspect, along with the provision of architectural controls to be applied and registered on title. The southwest portion of Railside Business Park contains 11 acres of vacant land to accommodate future development.

Highway 3 Corridor – Sunny Side Road to Broxburn
(see diagram 9)

There exists a number of parcels parallel to the highway that are fragmented and/or contain existing industrial or agri-business uses. Most of these areas have either been discussed with the City of Lethbridge as part of the IDP discussions or have been referenced in the *Integrated Development Strategy.* Part of the strategy is to further plan and allow development and infill on these parcels. Approximately 116 acres of undeveloped land exists in the northside Highway 3 / Marshall Auto Wreckers area that could be used for potential additional industrial and commercial development. Existing businesses, such as Marshall Auto Wreckers and Corteva, may not further develop their excess undeveloped land areas, or may use them for their own future business expansion. Due to existing land utilization by businesses, the overall land acreage may not be as large as depicted in the diagrams and table. However, there is 83.77 acres of raw land identified as a 'Priority – Initial' growth area immediately to the west of Broxburn Business Park and south of Highway 3, which would be an ideal extension of the core Broxburn development area. Across the highway to the north, on the west side of Sunny Side Road, is 20.20 acres that has started to be developed for light industrial agri-business use.

It is recognized that none of the potential growth areas identified have had any professional plans (e.g., area structure plans) prepared for them to facilitate subdivision or higher density industrial-commercial development in the foreseeable future. Additionally, the provision of adequate water services will need to be considered in the overall planning. To expand the Broxburn and Highway 3 Coaldale Corridor area, Area Structure Plans, with servicing, drainage and a connected transportation/access strategy being addressed, would need to be prepared.

Wilson Siding and Highway 4 Corridor
(see diagrams 10 – 13)

This should be considered as a "priority" growth area for Lethbridge County to encourage industrial-commercial development due to the area transportation networks, including highway and rail-line, and

growing interest in the area with existing and expanding businesses. Access to the rail transportation network and the possibility of spur-trackage is a significant benefit, with room to expand and grow.

Taylor Business Park – Section 5-8-20-W4

(see diagram 10)

The Wilson Siding Area (west of Highway 4) at Highway 508 has approximately 30 acres of land presently used adjacent to the rail-line for existing businesses. The new Taylor Business Park contains over 115 acres of land with an approved area structure plan, but no land developed. Initially only 55 acres may be developed in a first phase, primary due to future transportation and intersection issues that will need to be addressed with Highways 4 and 508 if the industrial park was fully developed. The strategy identifies the initial 71.15 acres as a 'Priority – Initial' growth area, and 41.99 acres as 'Successive – Secondary'. The Taylor Business Park Area Structure Plan outlined that water would be both raw irrigation and cistern delivered, and sewage treatment will be a communal mound system. There is also 90.83 acres of land identified to the immediate north, which may be planned for and developed in the future ('Prospective - Future") in conjunction with the Taylor Business Park. These land areas should be reserved for industrial-commercial use pending consideration for the long-term transportation management strategy that will be implemented for the Highway 4 and Highway 508 area. This is an area that will require consultation and discussion with Alberta Transportation.

Highway 845 - Viterra/Transmark SW & NW 27-7-20-W4

(see diagram 11)

Situated adjacent to Highways 4 and 845 and the CPR rail-line are over 343 acres of land. An Area Structure Plan was approved for this area in 2016 showing the potential development for the area. Since that time most of the lands have been developed by both Transmark and Viterra for their respective businesses. The Viterra grain terminals are situated on 115 acres of land adjacent to Highway 845, most of which is being used as they have recently installed a loop track on the site. There could be some development adjacent to highway 845 but that would be very limited. To the northeast and east, Transmark Ltd. owns a 97-acre parcel presently designated as RGI. The remaining lands to the north of the Viterra/UFA facilities includes a 57-acre parcel currently being used by Transmark for storage purposes (i.e. wind turbines). At the intersection of Highway 4 and 845 there is a vacant 2.9 acre parcel zoned Highway Commercial. As this area is mostly developed, the strategy identifies 126.42 acres in the SE 27-7-20-W4 is identified as long-term 'Prospective – Future' growth lands.

Diagrams 12 and 13 illustrate some lands in the Wilson Siding area, section 33-7-20-W4 (NW and SE 33-7-20-W4) and a portion in NE 32-7-20-W4 comprising approximately 219.72 acres, as long-term 'Prospective – Future' growth lands. These lands themselves would likely be a low priority area, other than perhaps some land parallel to the rail-line. However, the important aspect of identify this is that they may be considered as part of a larger planning exercise. These lands may provide a possible access and service road solution to the issues affecting the Taylor Business Park and Highway 508, and future restrictions to Highway 4 and the future development of the CANAMEX (see diagram 13).

Other than the Taylor Business Park area, all other identified growth areas would require an Area Structure Plan to be prepared, with servicing, drainage and a transportation/access strategy being addressed. In this Wilson Siding/Highway 4 area, consultation with Alberta Transportation is of pertinent importance.

Kipp - Coalhurst Area

(see diagram 14)

Additional opportunities are situated in the Highway 3, Kipp and Coalhurst area in proximity to the CPR Marshalling Yards. Earlier, 189.88 acres was identified immediately north of the Town of Coalhurst, along the Kipp Road, as outlined in the IDP with Coalhurst. This is recommended as a 'Priority – Initial' growth area, as the Town of Coalhurst has agreed to this concept, and the town has expressed some interest in collaborating with the County in facilitating its development. An additional, 262.71 acres is identified as potential 'Successive – Secondary' and 240.11 acres as 'Prospective – Future' growth areas, located primarily north of the existing marshalling yards. These areas are realistically long-term; however, they should be reserved for industrial growth due to their location as they are ideal to either expand the marshalling yards if ever needed, or they may accommodate inter-modal rail facilities that may benefit from the proximity to both the railway and highway. The future CANAMEX will have a system interchange at Highway 3 which will be near the growth area.

Chin – Highway 3 Area – SE 25-9-19-W4

(see diagram 15)

This is a small area in proximity to the Hamlet of Chin that is worth noting due to locational factors. This land is part of the McCain holdings, just north of Highway 3 and the CPR rail-line. The area consists of 26.18 acres and is identified as a 'Prospective – Future' growth area. If McCain's deems this to be surplus land to their business operations and is partial to selling it, this site is a suitable size to accommodate a business, especially an agri-business, which may desire good highway access. It is noted that the parcel across the municipal road allowance to the east is in the MD of Taber and contains a bio-mass processing facility. Such or similar uses would also be considered a compatible land use on the Lethbridge County side.

TABLE 10

Growth Areas – Potential Land Available for Industrial-Commercial Land Use

Industrial / Business Park Growth Area	Priority – Initial (acres)	Successive – Secondary (acres)	Prospective – Future (acres)
IDP & Other Special Areas			
Nobleford West	40.00	100.00	- - -
Coalhurst – Kipp North	189.88	262.71	240.11
- Kipp - Highway 25 Commercial	70.00	- - -	- - -
Picture Butte IDP	unknown	unknown	unknown
CANAMEX – Highway 25	unknown	unknown	unknown
CANAMEX – 43 Street N	unknown	unknown	unknown
Chin – Highway 3	- - -	- - -	26.18
Sub-Total	**299.88**	**362.71**	**266.29**
Grouped / Clustered Areas			
RAVE	- - -	- - -	2.00
Chinook Industrial Park	39.15	40.91	105.77
Duncan Airport Industrial Park	73.93	84.21	107.01
Stewart Siding	31.26	39.27	54.88
Broxburn - CANAMEX Corridor	155.58	96.84	328.70
- East of interchange	51.86	28.76	- - -
Highway 3 Lethbridge – Coaldale Corridor	103.97	19.95	81.08
Railside Business Park	- - -	- - -	11.00
Taylor Business Park	66.20	41.99	74.83
Viterra/Transmark - Highways 4 & 845	2.93	- - -	126.42
Wilson Siding – Highway 4	- - -	- - -	265.89
Sub-Total	**524.88**	**351.93**	**1,157.58**
TOTAL	**824.76**	**714.64**	**1,423.87**

Source: ORRSC Land Use Analysis 2022

- If approximately 30 acres per year of industrial-commercial land was developed in business parks, the growth areas identified should provide for a 100 to 120 year land supply.
- If approximately 20 acres per year of industrial-commercial land was developed in business parks, the growth areas identified should provide for over 150 to 170 year land supply.

PART SIX | Strategy and Recommendations

6.1 Primary Strategy

In moving forward with preparing a land use strategy for Lethbridge County, the question is how may the County attempt to meet the goals of this report, and in particular, assist in the diversification of the local economy? The County's Industrial-Commercial Land Use Strategy is a framework for guiding actions and considering policies that may need to be adopted to implement the goals and strategies of the plan. Over time, these also may eventually need to be updated to respond to changing requirements and market conditions. The primary elements of the general strategy, which are associated with the goals of this report, are listed below.

1. The growth plan is to provide a framework which will facilitate the development of a viable and feasible business sector in the County by addressing land use and locational opportunities and constraints, by effectively planning for a suitable and readily available land supply at realistic marketing and consumption rates.

2. To plan for effective, managed growth when supporting and encouraging the establishment and expansion of industrial business parks or centres and provide some locational certainty to businesses looking to locate within the municipality.

3. To identify and outline the required land use planning activities to facilitate the development and redevelopment of industrial areas in an orderly, cost-effective way, and ensure land development opportunities are continually available.

4. To reserve and protect those areas within the municipality identified as the logical and suitable areas to be utilized for future growth and expansion of industrial/commercial activities, so that they may appropriately be planned to accommodate industrial or commercial development.

5. To use the recommended planning framework to guide and plan for the building of transportation, drainage and other infrastructure in industrial areas at the rate required to meet demand for industrial/commercial land and to enable the services to be efficiently provided that support business activity.

6. To assist in diversifying the local economy and allow new businesses to establish, by providing developers tangible options and ensuring land is available for development possibilities.

7. To have a clear land use plan that can be used to form and participate in strategic partnerships and programs to create or capitalize on economic development opportunities that are associated with industrial/commercial land development.

6.2 Key Principles and Recommendations

In addition to the previously identified general strategy objectives, several key principles and recommendations are suggested for Council's consideration, in order to successfully implement the overall strategy and help plan for land use decisions regarding industrial/commercial land development.

This report makes a number of recommendations based on the investigation that occurred as interpreted by the authors and as discussed with County administrative staff. It is important that Council continue the process beyond this point and this section provides suggestions on how to proceed after the report is accepted for information.

6.2.1 Economic

1. The County should maintain an up-to-date and reliable information database on vacant industrial land, land absorption rates and market trends.

2. Attempts should be made, wherever possible, to assist landowners, businesses and prospective new industrial-commercial developers through providing up-to-date potential land sites and parcel details, development process information, and enhanced communication to help facilitate the development of industrial land and buildings with potential developers.

3. The County should actively approach and engage those private landowners whose land is identified as a preferred growth area, to gauge interest in developing the land, selling the land, or ascertain long-term interest in using the land.

4. If a future secured water supply is secured for a specific business park or area, the County should strive to reserve those areas for industries that require water for processing or manufacturing, and appropriately direct potential business to those areas, and direct non-water users to other areas that may be suitable.

6.2.2 Land Use and Planning

1. It should be ensured that there is a minimum two-three year supply of ready or serviced industrial - commercial land in various industrial areas, based on current trends and local absorption rates (for the most recent five-year period).

2. It is recommended that slightly more land than what is typically developed in a year should be available to prospective business interests, as it takes time to plan for, obtain necessary approvals, subdivide and service land and it cannot be brought to market in a relative short time frame.

3. As part of the strategy the County should try to ensure there is continually available a minimum of 70 - 80 acres of readily accessible land amongst the various business parks and suitable isolated parcels to accommodate development.

4. Home occupations should continue to be allowed wherever deemed appropriate, with the County reviewing and monitoring their success or constraints over time. At some point in future time, those home occupations that have successfully grown or desire to expand should be encouraged to relocate to established industrial areas. The County may also wish to expand the parameters of home occupations to enable more flexibility for landowners to operate a commercial business on their property.

5. The Highway 3 Lethbridge-Coaldale Corridor and Broxburn area have future development potential, taking advantage of existing transportation systems and synergy opportunities. The long-term protection and planning of lands identified for potential future industrial-commercial growth should

be considered and the Highway 3 Corridor area should remain a 'priority' growth area for Lethbridge County.

6. The south Highway 4 Corridor (Taylor Business Park, Wilson Siding area) is considered a "priority" growth area due to the area transportation networks, including highway and rail-line, and growing interest in the area with existing and expanding businesses (refer to Diagrams 8 & 9). In particular, access to the rail transportation network and the possibility of spur-trackage are a significant benefit.

7. The long-term planning for available land should consider a strategy of situating it in a number of locations rather than one location only, to assist with market choices and locational factors. Thus, slightly more land than what actually may be developed on a yearly basis needs to be considered overall as part of the planning and economic strategy.

8. To continue to support, where deemed suitable, the opportunities for appropriate isolated development to occur, especially for those that enable value added agricultural processing to expand and establish within a rural area closer to the material/commodity source.

9. Isolated parcels may be considered for industrial-commercial use, especially those that are agricultural related or support agri-business. Such consideration should include that it is determined the site is appropriate, any servicing required in relation to the proposed need can be provided, roads will not be significantly impacted, and the use is determined not to negatively affect any pre-established residents in proximity.

10. All industrial land uses which are considered by the approving authority to be detrimental to public health, safety, and welfare, or those uses which, because of their toxic gases, noxious smells, noise, odour, dust or smoke emissions are incompatible with other developments, should be located on lands specifically established for such uses through the land use designation of the land use bylaw (e.g. zoned 'Rural Heavy Industrial' or 'Direct Control').

11. For applications pertaining to isolated industrial uses, the County should request as complete of information as possible on the proposal in order to better track, manage and even direct uses to appropriate locations. Redesignation or development application information should include:
    - data on the use such as number of employees, area required, buildings and signs, traffic impact;
    - site plan which is accurate and shows existing structures, proposed structures, proposed storage area;
    - structure elevations;
    - proposed storage and screening;
    - source of water supply and firefighting supply;
    - drainage plan prepared by an engineer;
    - a statement explaining why the location is requested and why the use should be allowed outside a hamlet or designated clustered/grouped industrial area.

12. Where or when development of new industrial land appears stagnant by the private sector, the County may consider playing a strategic and active role either by engaging proactively with landowners or providing assistance in preplanning processes (e.g., undertaking Concept Plans or Area Structure Plans).

13. The County has Intermunicipal Development Plans (IDPs) with all if its urban neighbors and in some of the plans areas have been identified where the County may grow and develop land for non-agricultural purposes. The most likely areas to be developed should be considered first for additional planning, engineering or subdivision work that will need to occur by developers prior to selling lots.

14. The type of new industrial or commercial business likely to establish in the County may depend on its water usage needs as water availability is limited and the County has no water treatment facility itself. As part of the long-term strategy, the County should continue to examine and pursue all options and arrangements possible to help establish and develop a long-term and stable strategy regarding the provision of water for industry. In consideration of this reality, the ability to expand the industrial and commercial land use sector may be more limited to those uses that only need a limited water supply.

15. As part of the strategy, any potential areas which may in the future benefit from or be recipients of water and/or sanitary sewer service should it become available, should be reserved for industrial-commercial land use and not prematurely converted to some other type of use, especially residential.

16. The County should be proactive and wherever possible seek new funding methods or sources, and consider new technology for developing major infrastructure required to service industrial/commercial development.

17. The design of business parks needs to allow for phasing of subdivision or development in a logical and feasible fashion, so too much land is not removed from agricultural production and is sitting vacant for long periods of time.

18. The lands identified as industrial-commercial growth areas should be reserved for those uses and they should not be used for grouped county residential use or other incompatible land uses.

19. County Council may consider predesignating in the land use bylaw some priority growth area lands to industrial in order to prevent other unwanted land uses from establishing on the identified lands, and to help streamline the development process for land developers.

20. It is recognized that nearly all of the future growth lands identified are presently in an undeveloped raw land state, primarily being utilized for agricultural purposes by private landowners. Therefore, additional consultation, planning and development steps must be undertaken prior to any of these areas being brought on-line for development purposes and these processes will take significant time. In respect of this, the County should timely and actively consult landowners, especially in the 'priority" areas about the development possibilities, and assist with the process as much as it can.

21. Prior to land development occurring, additional planning exercises will need to be done for the undeveloped lands identified as growth areas. This would include the preparation and adoption of area structure plans, which typically will include servicing information, engineering evaluation on soils, storm water management engineering, and a transportation access management strategy.

22. The County may consider preparing some higher level concept design schemes in specific areas, that illustrate desired design elements and a transportation road network that aligns with adjacent land parcels and both the local municipal and provincial road networks in the vicinity. Any area structure plans subsequently prepared would then be required to "align" with the overall higher concept plan for the larger area. This will help guide planning and ensure cohesiveness between planning areas that will likely be developed over time or in phases.

23. The County needs to actively engage and consult with Alberta Transportation as it is the approval authority relating to access on the highway and manages control over how development and traffic may impact the integrity of the highway system, as the majority of identified industrial business parks are adjacent to the provincial highway network.

24. The County needs to be in close contact with CPR rail company officials throughout any process of planning adjacent to rail-lines or where access to trackage is desired, especially at the Area Structure Plan stages. All rural service and spur-trackage must conform to the requirements of the CPR and the County adheres to the setback guidelines as prepared and agreed to by the Federation of Canadian Municipalities and the CPR.

25. The County may consider undertaking some enhanced form of proactive public pre-engagement for specific industrial-commercial areas when development plans arise, in order to better explain County initiatives and the proposal itself, especially when the land is in proximity to residential uses. Proposed industrial-commercial uses may raise concerns for residents, especially if all the information or plans are not fully known or understood.

26. This report may be viewed as the first step in the preparation of a comprehensive policy framework for the promotion and development of an enhanced industrial and commercial sector in Lethbridge County. An overall framework should include policy or strategies related to:
    - protection of higher quality agricultural lands by strategically developing in accordance with the strategy,
    - providing logical and suitable land areas for future business development,
    - reserving and protecting identified future development areas for industrial-commercial uses,
    - managing or guiding future planning processes, such as area structure plan preparation, to be prepared in accordance with this report,
    - applying development standards as provided for in the Land Use Bylaw to approvals, and
    - undertaking the active promotion of Lethbridge County as a choice location for industrial-commercial uses.
27. The information and data in this report is based on a snapshot in time and should be reviewed over a period of time, to help better gauge active land development that is occurring and adjust the strategy as deemed necessary. For example, the projection of land consumption is based on past trends and variable data and after a period of time (e.g., 5 years) the estimate may need to be revised.

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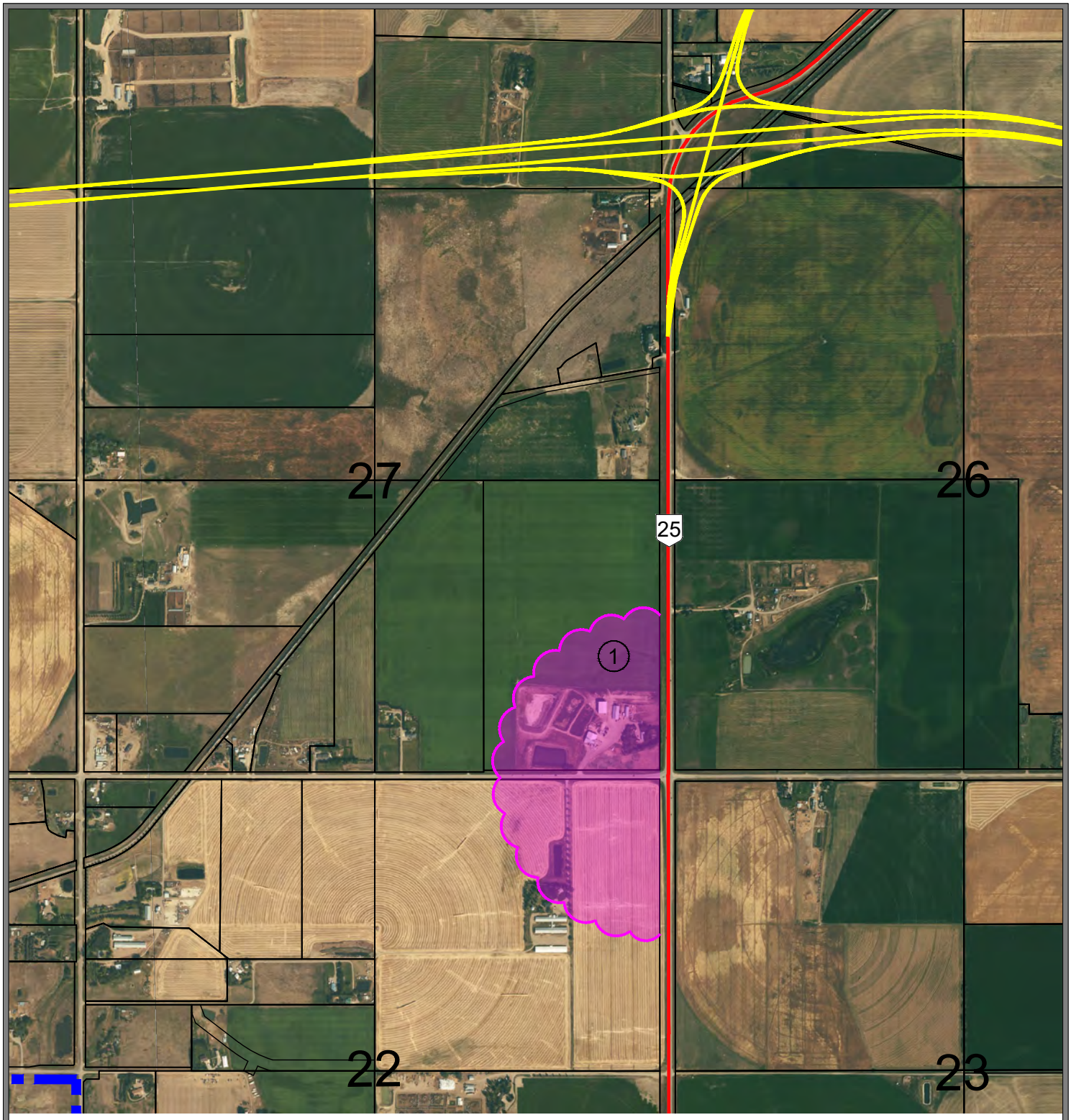
APPENDIX A

BACKGROUND ANALYSIS MAPS



LETHBRIDGE COUNTY INDUSTRIAL -
COMMERCIAL LAND USE STRATEGY

GROWTH AREAS - DIAGRAM 1

HIGHWAY 25 & KIPP ROAD

GROWTH AREA BOUNDARY

1 PRIORITY - INITIAL
NE22-9-22 W4M & SE27-9-22 W4M
BUSINESS LIGHT INDUSTRIAL OR COMMERCIAL

PROPOSED CANAMEX
HIGHWAY

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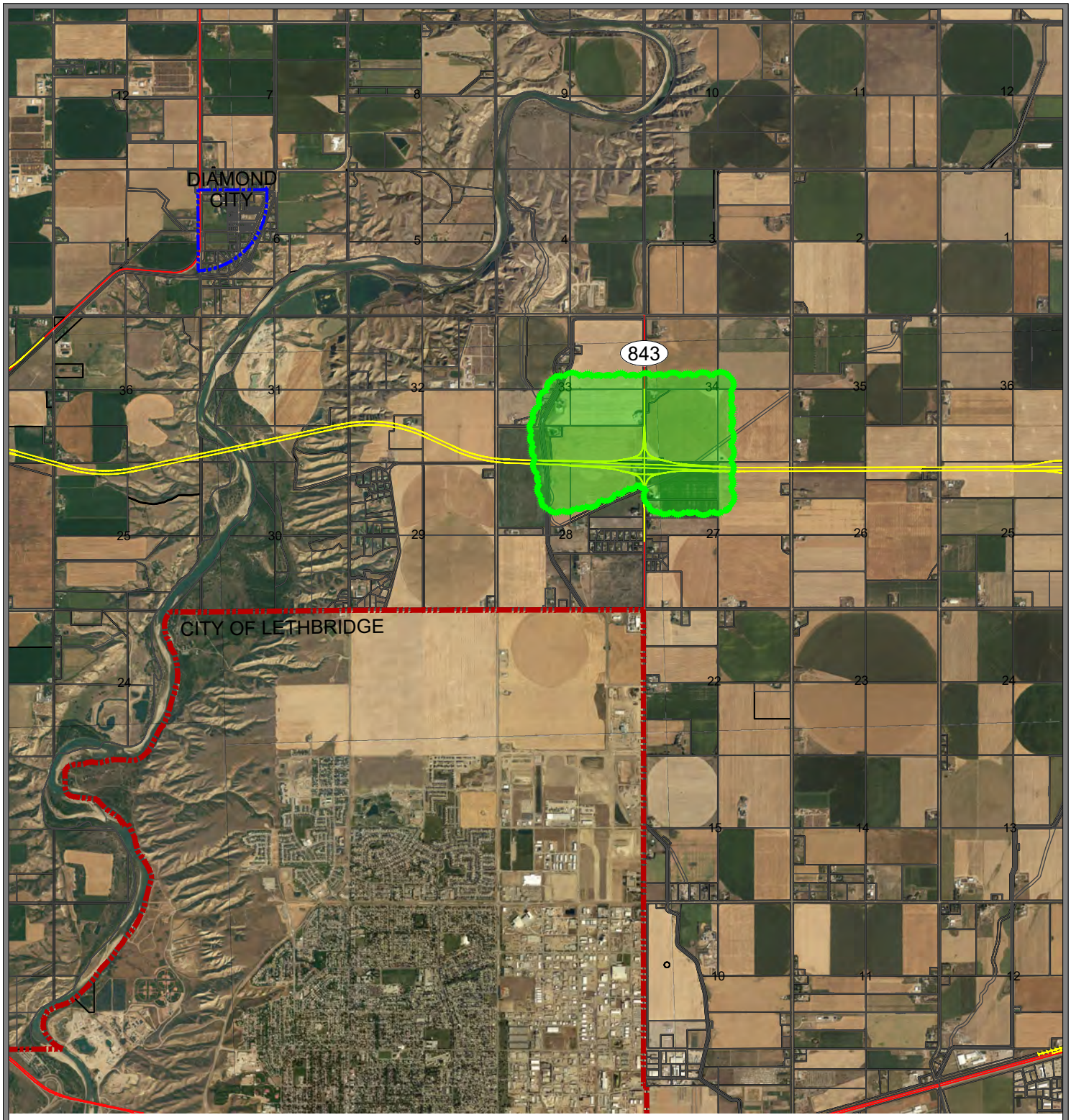

LETHBRIDGE COUNTY INDUSTRIAL -
COMMERCIAL LAND USE STRATEGY

GROWTH AREAS - DIAGRAM 2

CANAMEX & HIGHWAY 25 INTERCHANGE AREA

GROWTH AREA BOUNDARY

PROSPECTIVE FUTURE
HIGHWAY COMMERCIAL CLUSTER
(3) SECTIONS 27, 28, 33 & 34 TWP 9 RGE 21 W4M

PROPOSED CANAMEX
HIGHWAY

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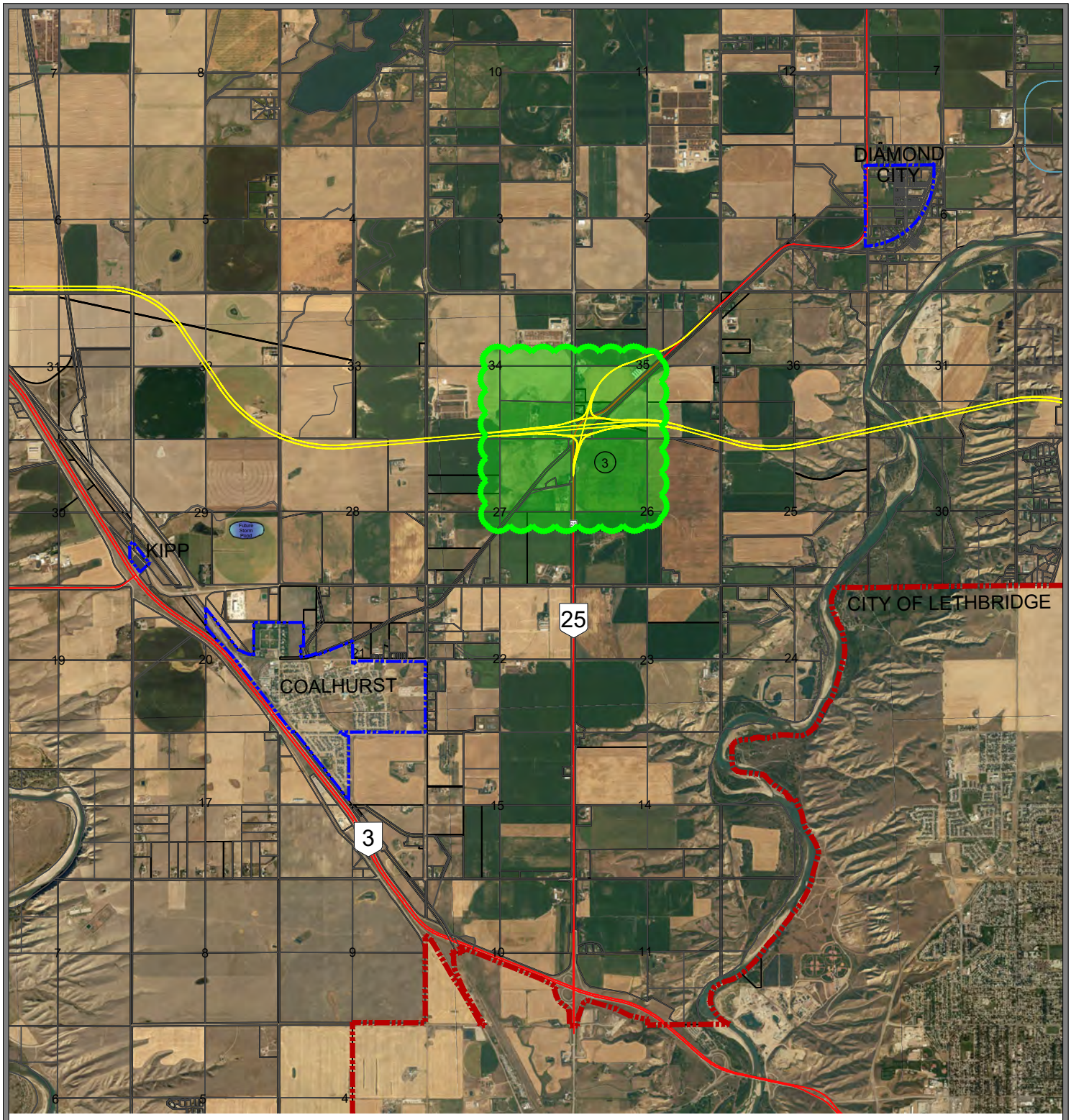

LETHBRIDGE COUNTY INDUSTRIAL -
COMMERCIAL LAND USE STRATEGY

GROWTH AREAS - DIAGRAM 3

CANAMEX & HIGHWAY 25 INTERCHANGE AREA

GROWTH AREA BOUNDARY

PROSPECTIVE FUTURE
HIGHWAY COMMERCIAL CLUSTER
SECTIONS 26, 27, 34 & 35 TWP 9 RGE 22 W4M

PROPOSED CANAMEX
HIGHWAY

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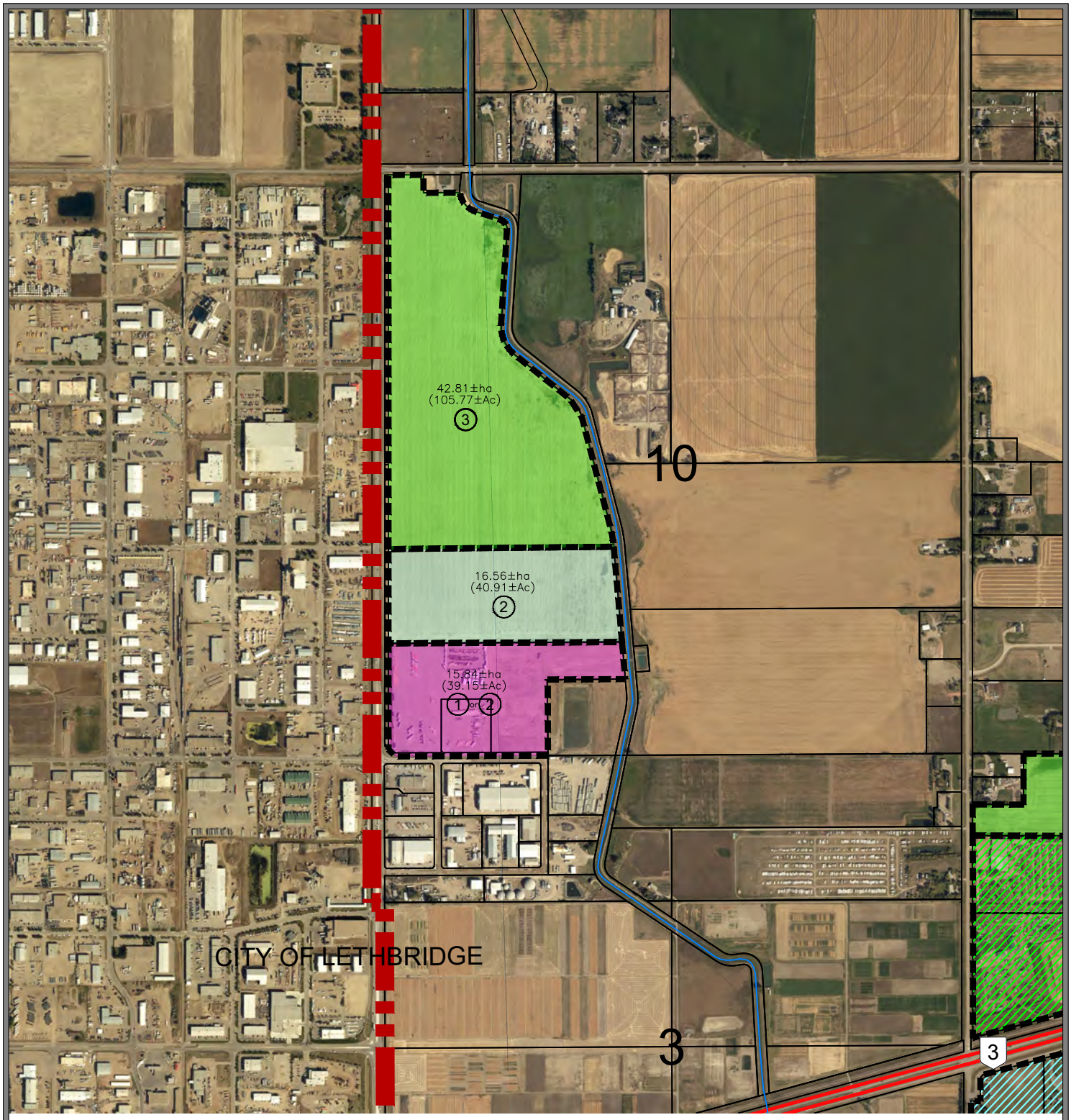

LETHBRIDGE COUNTY INDUSTRIAL - COMMERCIAL LAND USE STRATEGY

GROWTH AREAS - DIAGRAM 4

RAVE INDUSTRIAL AREA

GROWTH AREA BOUNDARY

(1) or (2) PRIORITY - INITIAL
LOT 4, BLOCK 1, PLAN 1113171
WITHIN SW10 9-21-W4M
15.84±ha(39.15±Ac)

(3) PROSPECTIVE - FUTURE
LOT 5, BLOCK 1, PLAN 1113171
WITHIN SW10 9-21-W4M
42.81±ha(105.77±Ac)

(2) SUCCESSIVE - SECONDARY
LOT 5, BLOCK 1, PLAN 1113171
WITHIN SW10 9-21-W4M
16.56±ha(40.91±Ac)

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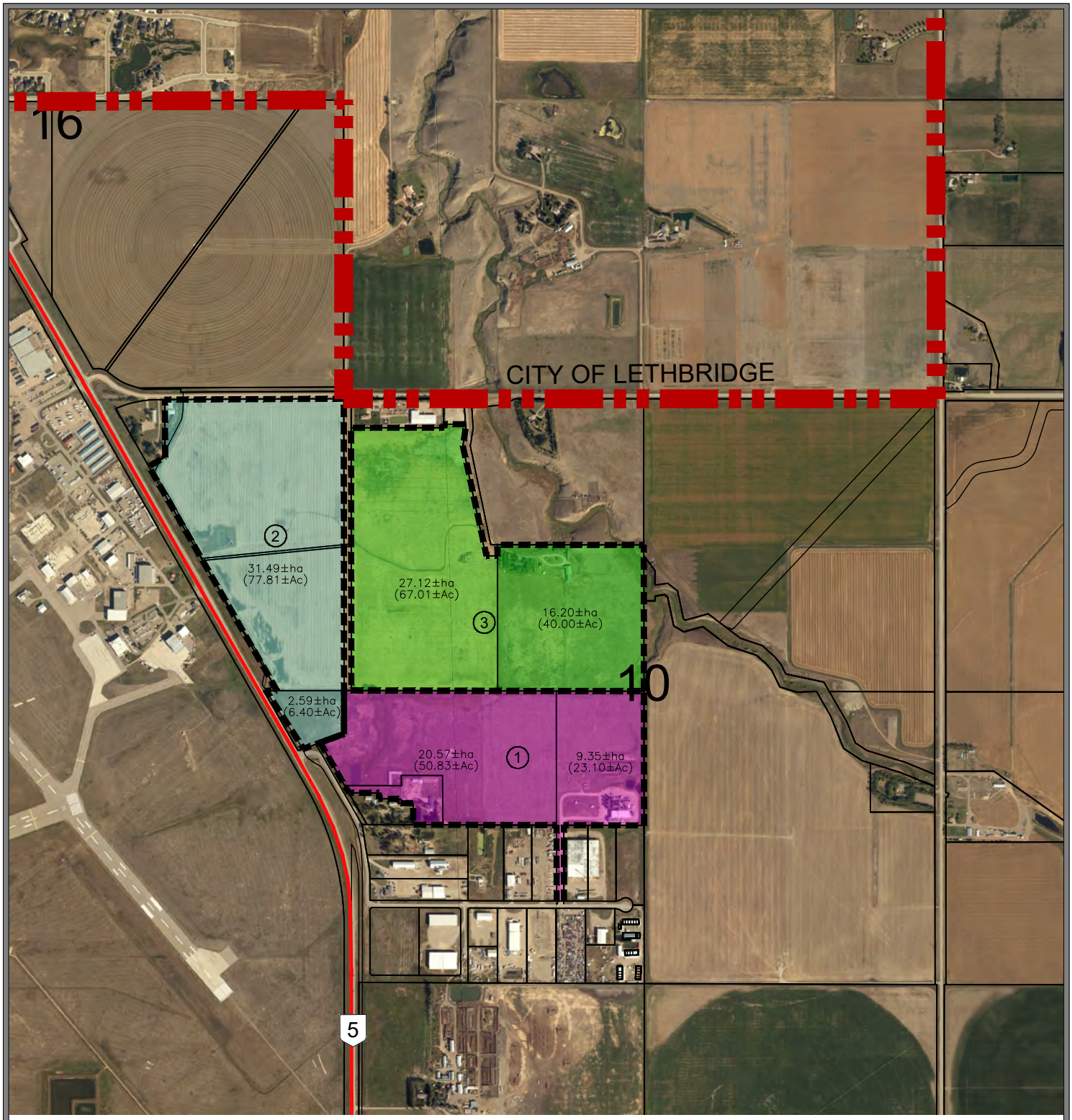

LETHBRIDGE COUNTY INDUSTRIAL - COMMERCIAL LAND USE STRATEGY

GROWTH AREAS - DIAGRAM 5

DUNCAN AIRPORT INDUSTRIAL AREA

- GROWTH AREA BOUNDARY
- ① PRIORITY - INITIAL
  SW10-8-21 W4M
  29.92±ha(73.93±Ac)
- ② SUCCESSIVE - SECONDARY
  E9-8-21 W4M
  34.08±ha(84.21±Ac)
- ③ PROSPECTIVE - FUTURE
  NW10-8-21 W4M
  43.32±ha(107.01±Ac)

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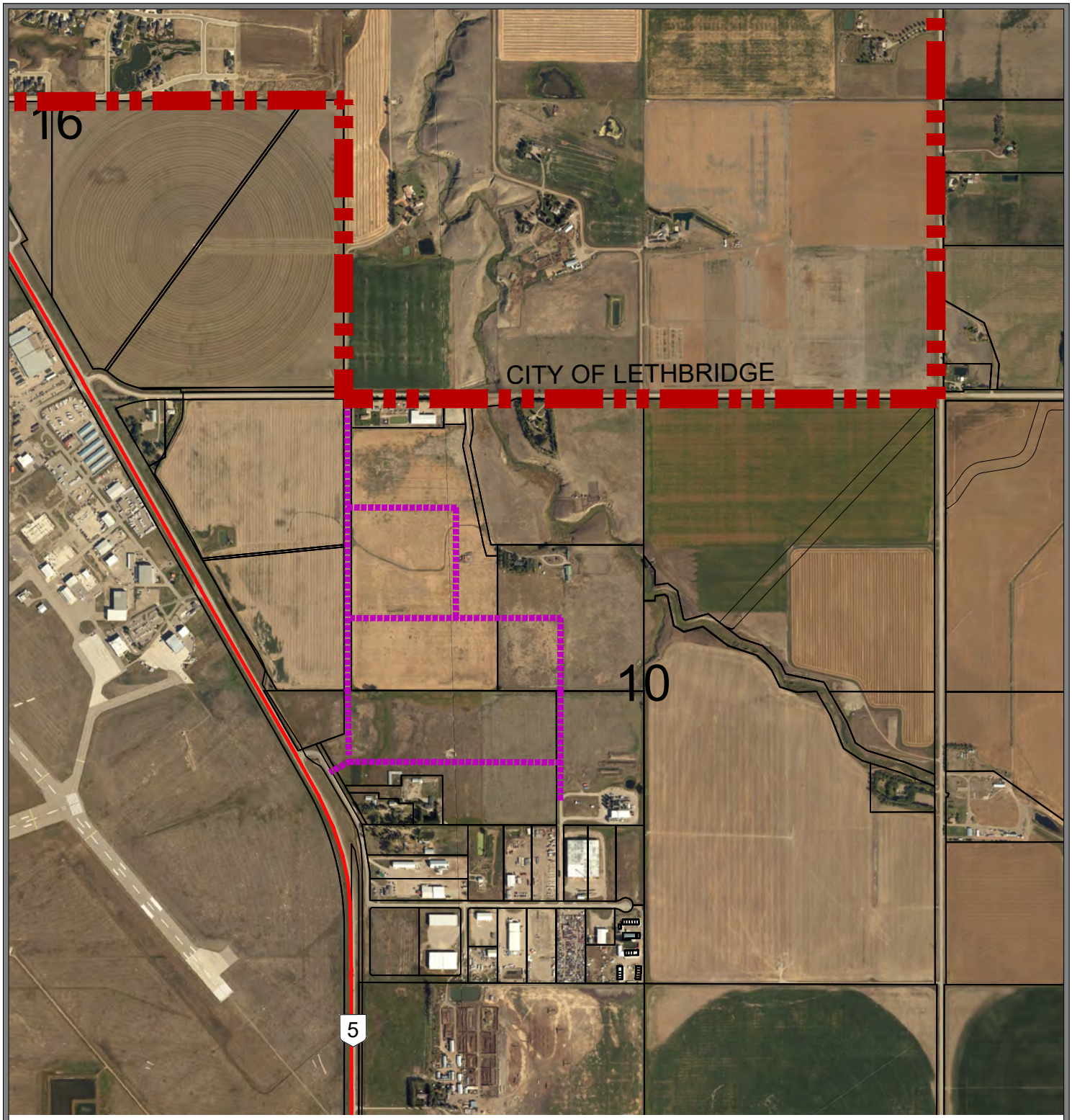

LETHBRIDGE COUNTY INDUSTRIAL -
COMMERCIAL LAND USE STRATEGY

CONCEPTUAL ROAD NETWORK
DIAGRAM 6

DUNCAN AIRPORT INDUSTRIAL AREA

- EXISTING HIGHWAYS
- EXISTING COLLECTORS
- CONCEPTUAL ROAD NETWORK

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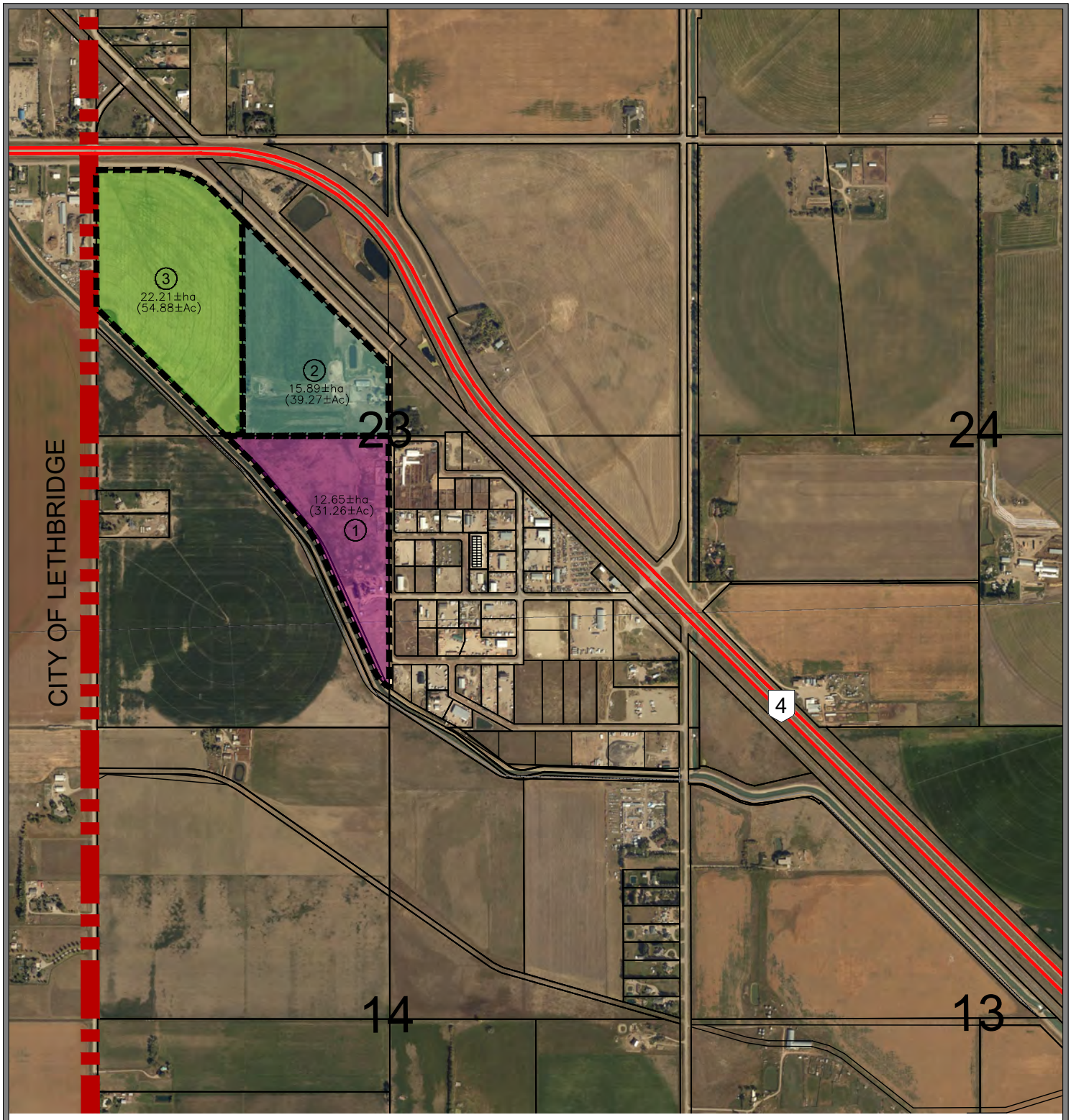

LETHBRIDGE COUNTY INDUSTRIAL - COMMERCIAL LAND USE STRATEGY

GROWTH AREAS - DIAGRAM 7

STEWART SIDING AREA

- GROWTH AREA BOUNDARY
- PRIORITY - INITIAL
  1 SW23-8-21 W4M
  12.65±ha(31.26±Ac)
- SUCCESSIVE - SECONDARY
  2 NW23-8-21 W4M
  15.89±ha(39.27±Ac)
- PROSPECTIVE FUTURE
  3 NW23-8-21 W4M
  22.21±ha(54.88±Ac)

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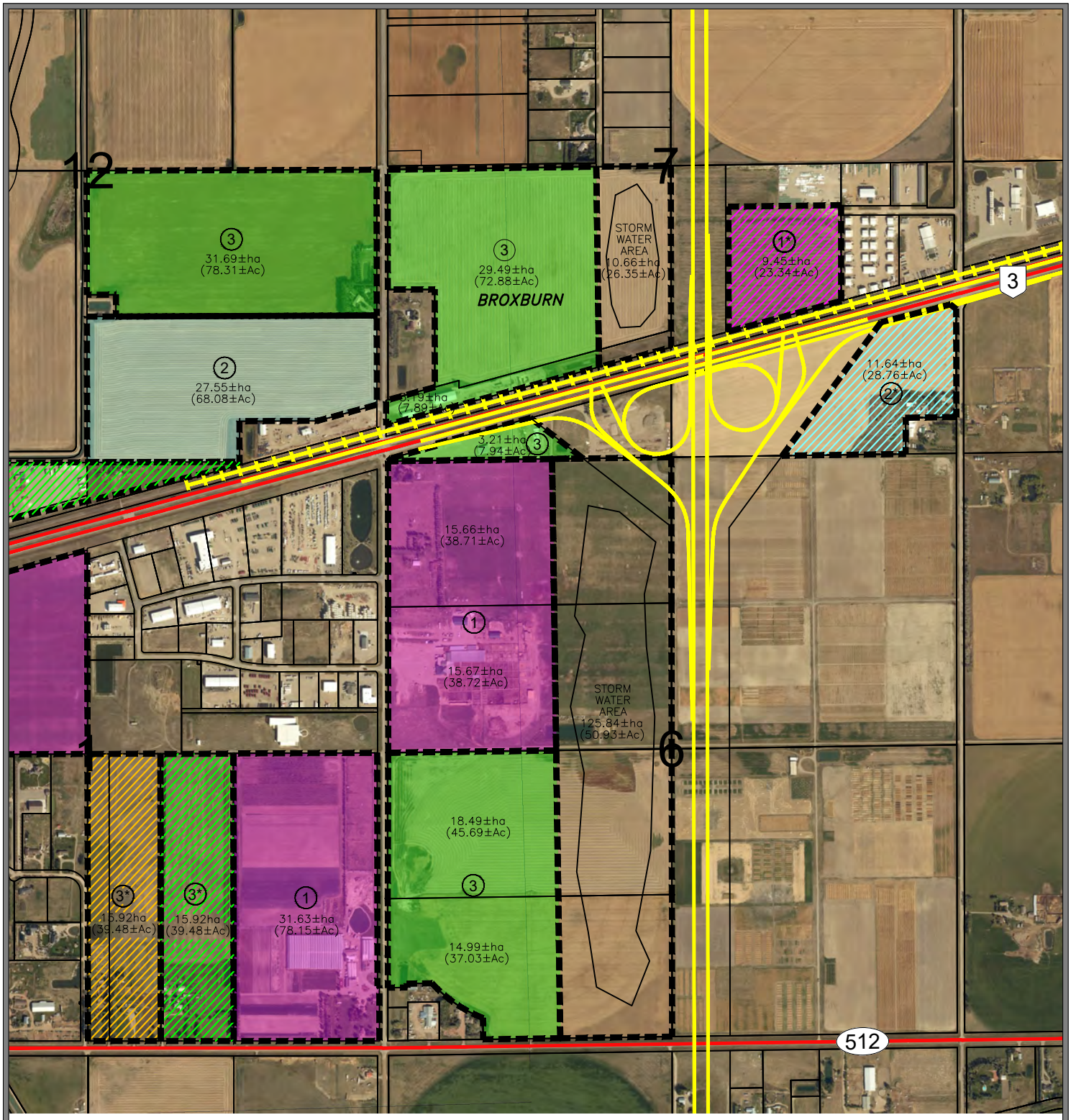

BROXBURN & CANAMEX INTERCHANGE AREA
HIGHWAY 3 CORRIDOR

LETHBRIDGE COUNTY INDUSTRIAL - COMMERCIAL LAND USE STRATEGY

GROWTH AREAS - DIAGRAM 8

- GROWTH AREA BOUNDARY
- PROPOSED CANAMEX HIGHWAY
- (1) PRIORITY - INITIAL 62.96±ha(155.58±Ac)
- (1*) PRIORITY - INITIAL LIGHT INDUSTRIAL OR COMMERCIAL 9.45±ha(23.34±Ac)
- (3*) PROSPECTIVE - FUTURE MIXED-USE RESIDENTIAL AND/OR LIGHT INDUSTRIAL 15.92±ha(39.48±Ac)
- (2) SUCCESSIVE - SECONDARY 27.55±ha(68.08±Ac)
- (2*) SUCCESSIVE - SECONDARY LIGHT INDUSTRIAL OR COMMERCIAL 11.64±ha(28.76±Ac)
- (3) PROSPECTIVE - FUTURE 101.07±ha(249.74±Ac)
- (3*) PROSPECTIVE - FUTURE LIGHT INDUSTRIAL OR COMMERCIAL 15.92±ha(39.48±Ac)

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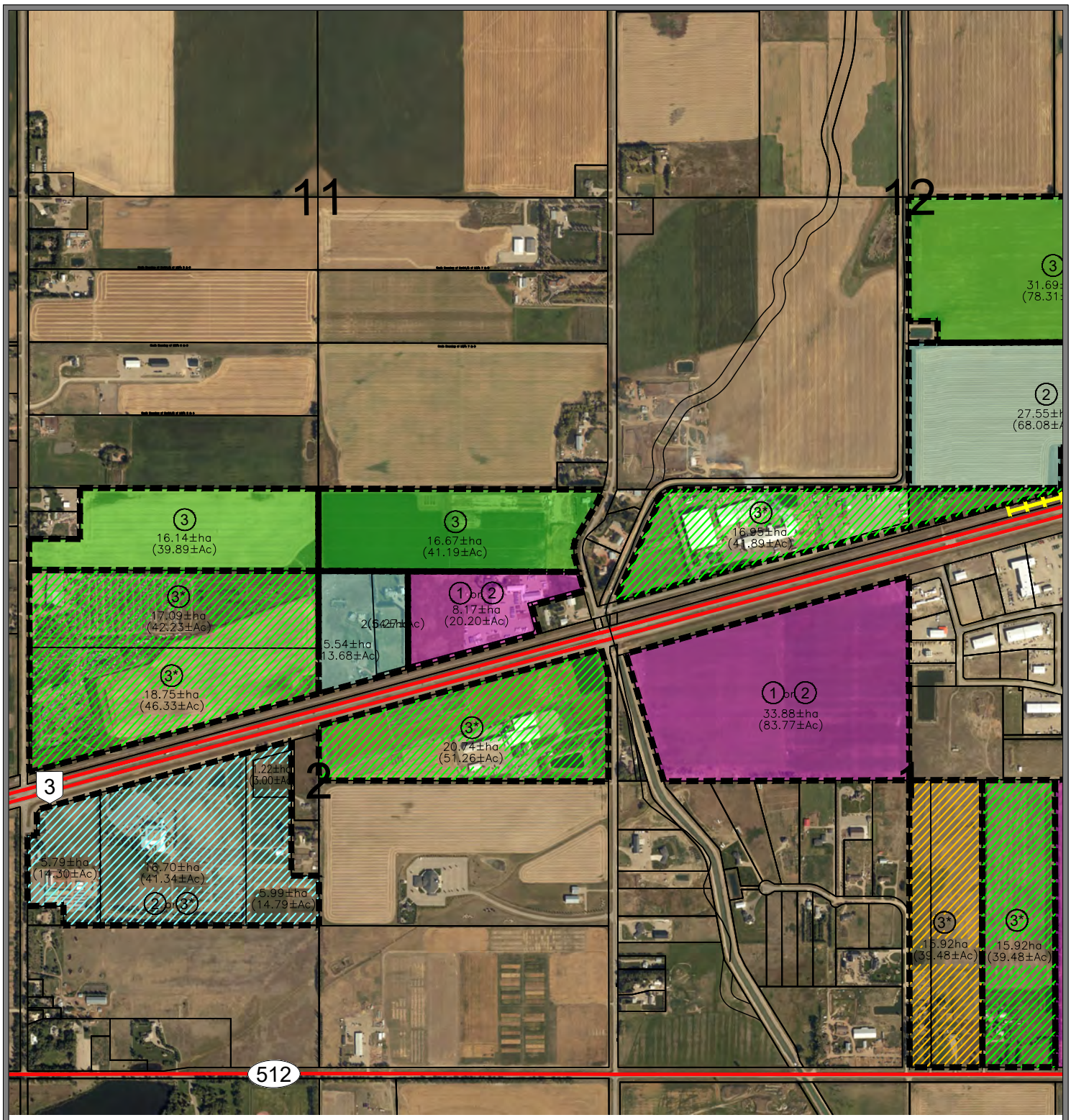

HIGHWAY 3 LETHBRIDGE - COALDALE CORRIDOR

LETHBRIDGE COUNTY INDUSTRIAL - COMMERCIAL LAND USE STRATEGY

GROWTH AREAS DIAGRAM 9

GROWTH AREA BOUNDARY

(1) or (2) PRIORITY - INITIAL
42.05±ha(103.97±Ac)

(2) SUCCESSIVE - SECONDARY
8.08±ha(19.95±Ac)

(3) PROSPECTIVE - FUTURE
32.81±ha(81.08±Ac)

(3*) EXISTING DEVELOPMENT - INFILL POTENTIAL
89.45±ha(221.19±Ac)

(3*) EXISTING DEVELOPMENT - INFILL FOR COUNTRY RESIDENTIAL/COMMERCIAL
15.92±ha(39.48±Ac)

(2) or (3*) EXISTING MIXED USE - INFILL FOR COMMERCIAL/INSTITUTIONAL
29.72±ha(73.43±Ac)

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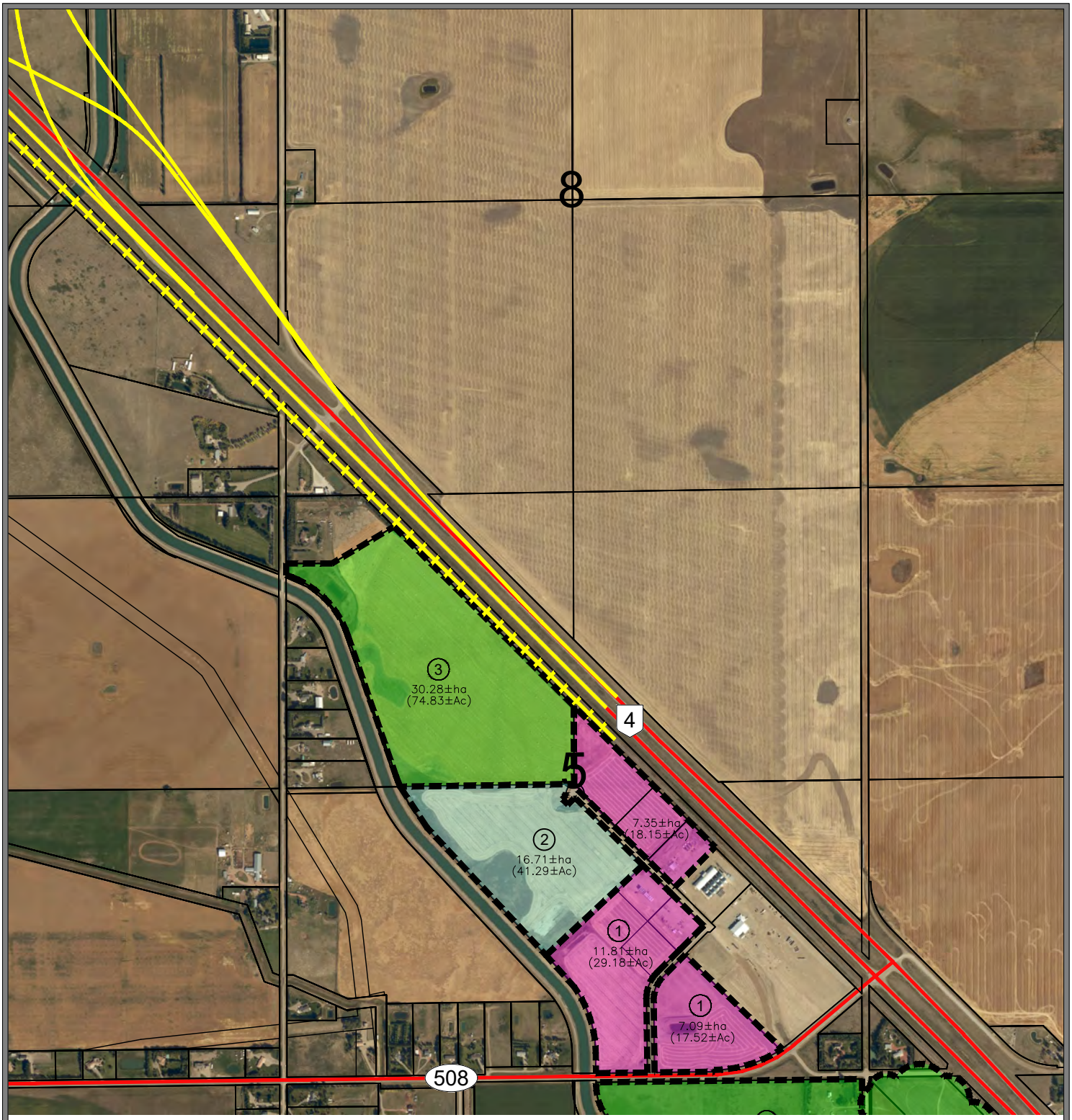

LETHBRIDGE COUNTY INDUSTRIAL - COMMERCIAL LAND USE STRATEGY

GROWTH AREAS - DIAGRAM 10

TAYLOR BUSINESS PARK/WILSON SIDING AREA

- GROWTH AREA BOUNDARY
- PROPOSED CANAMEX HIGHWAY
- PRIORITY - INITIAL (1) SE5-8-20 W4M 26.80±ha(66.20±Ac)
- SUCCESSIVE - SECONDARY (2) SW, SE & NE5-8-20 W4M 16.99±ha(41.99±Ac)
- PROSPECTIVE - FUTURE (3) NW5-8-20 W4M 30.28±ha(74.83±Ac)

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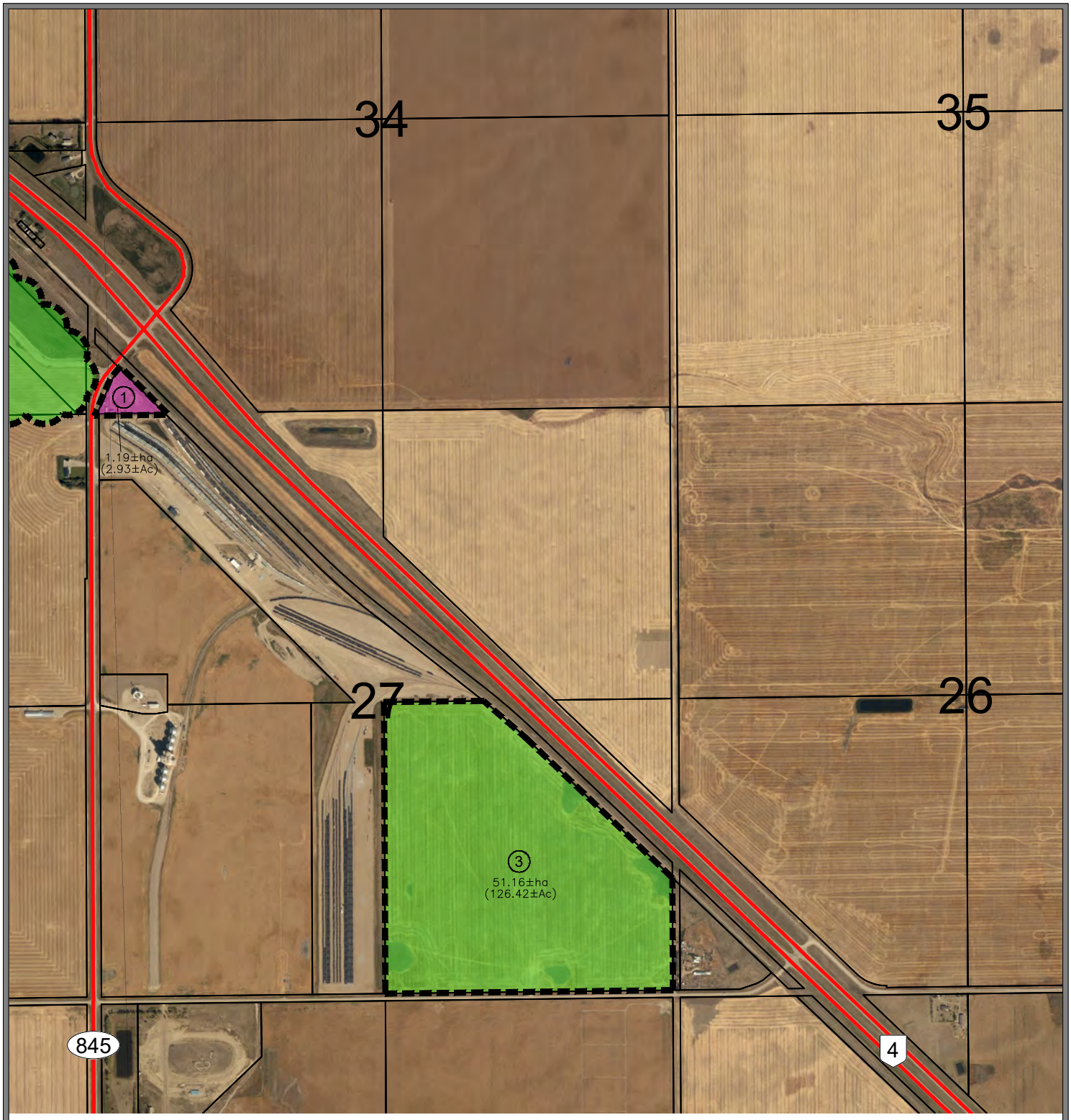

TRANSMARK/VITERRA AREA
HIGHWAY 4 & 845

LETHBRIDGE COUNTY INDUSTRIAL - COMMERCIAL LAND USE STRATEGY

GROWTH AREAS - DIAGRAM 11

GROWTH AREA BOUNDARY

PRIORITY - INITIAL
(1) SW34-7-20 W4M
1.19±ha(2.93±Ac)

PROSPECTIVE - FUTURE
(3) SE27-7-20 W4M
51.16±ha(126.42±Ac)

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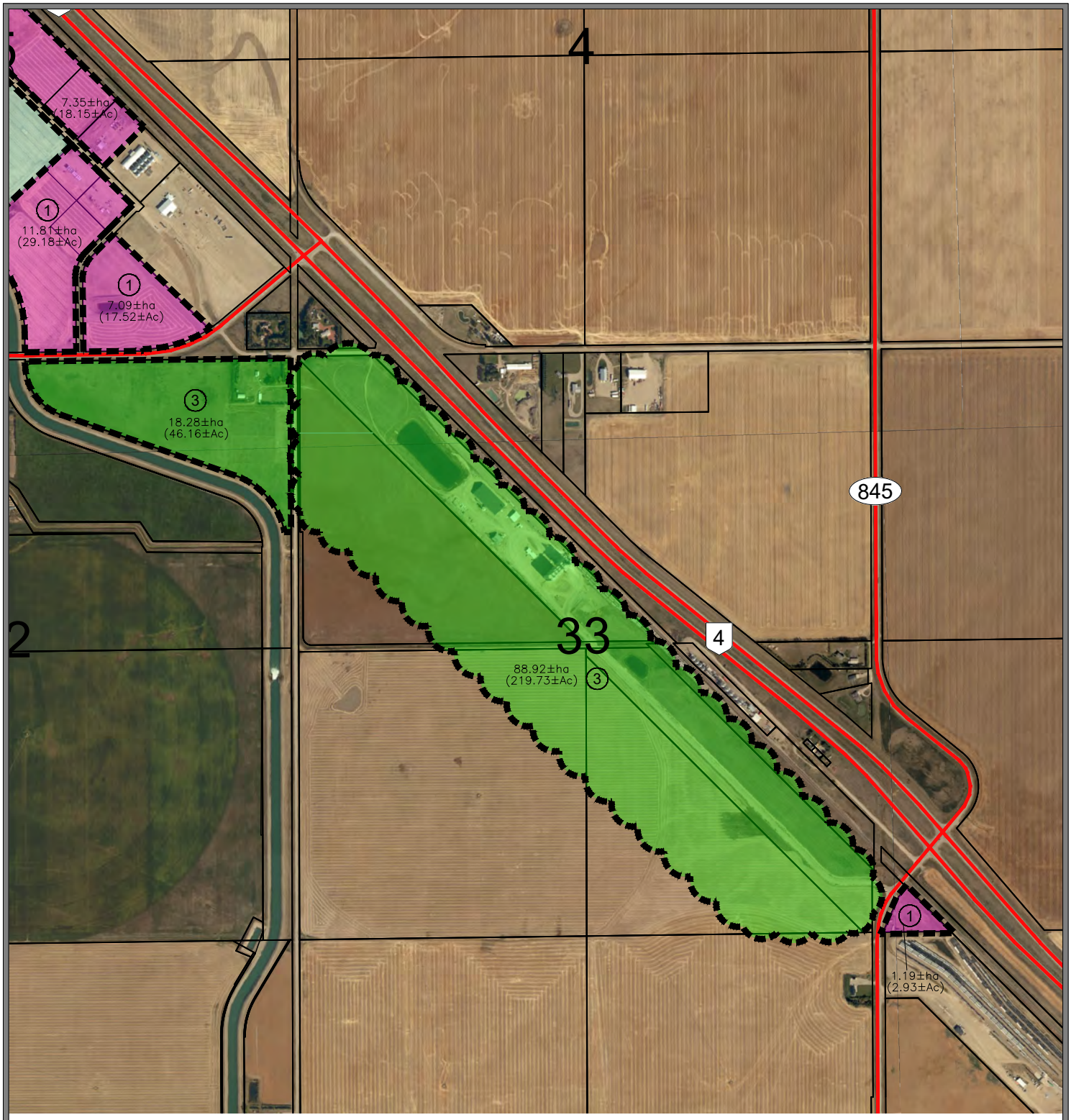

LETHBRIDGE COUNTY INDUSTRIAL - COMMERCIAL LAND USE STRATEGY

GROWTH AREAS - DIAGRAM 12
CONCEPTUAL

WILSON SIDING/HIGHWAY 4 AREA

- GROWTH AREA BOUNDARY
- ③ PROSPECTIVE - FUTURE
  SEC 33-7-20 W4M & NE32-7-20 W4M
  107.20±ha(265.89±Ac) *
- ① PRIORITY - INITIAL
  REFER TO GROWTH DIAGRAM 10
- ② SUCCESSIVE - SECONDARY
  REFER TO GROWTH DIAGRAM 11

*Area is approximate

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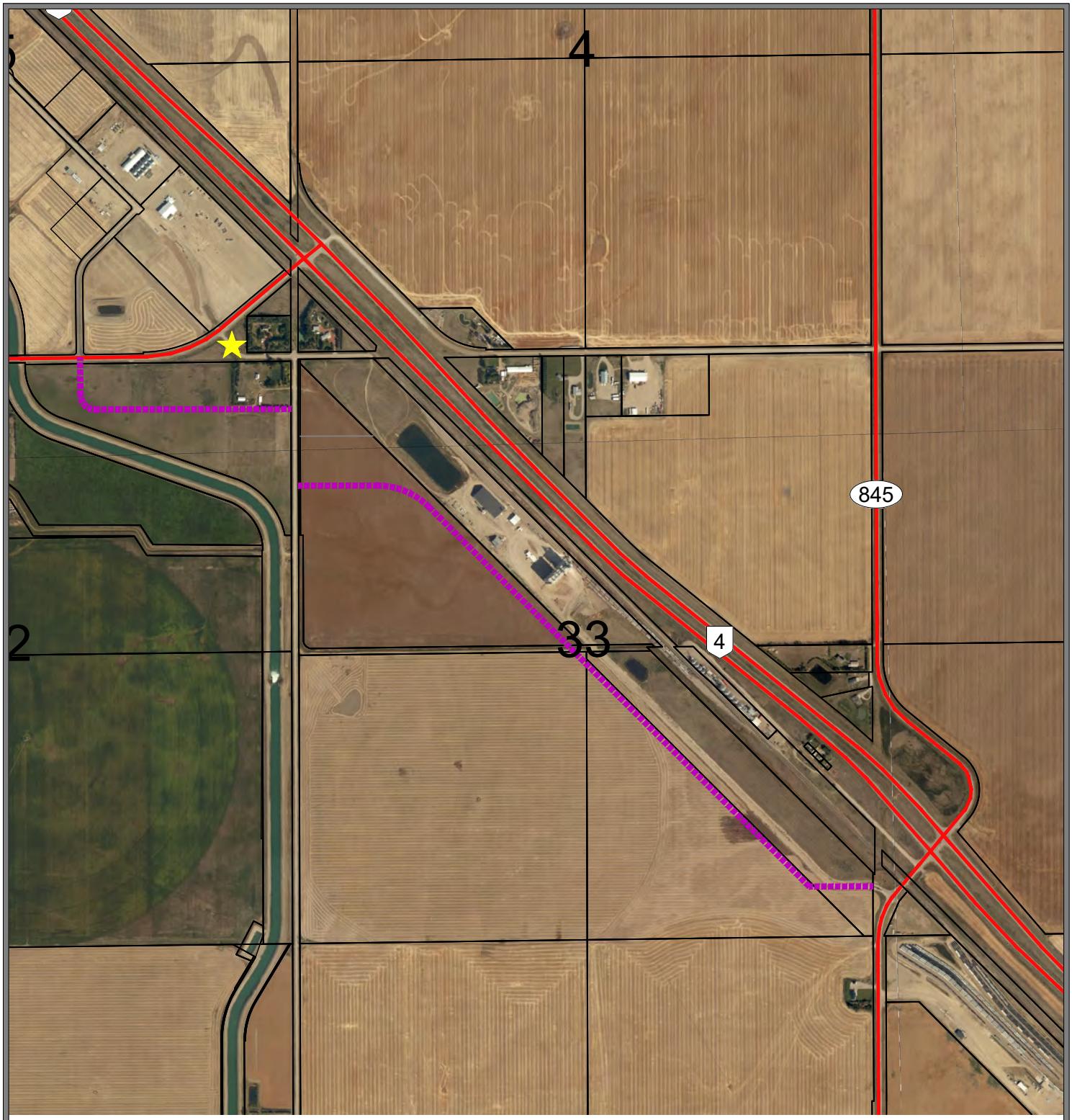

LETHBRIDGE COUNTY INDUSTRIAL -
COMMERCIAL LAND USE STRATEGY

FUTURE CONCEPTUAL SERVICE ROAD
DIAGRAM 13

WILSON SIDING/HIGHWAY 4 AREA

- EXISTING HIGHWAYS
- EXISTING SERVICE ROADS
- CONCEPTUAL ROAD NETWORK
- POTENTIAL FUTURE CLOSURE

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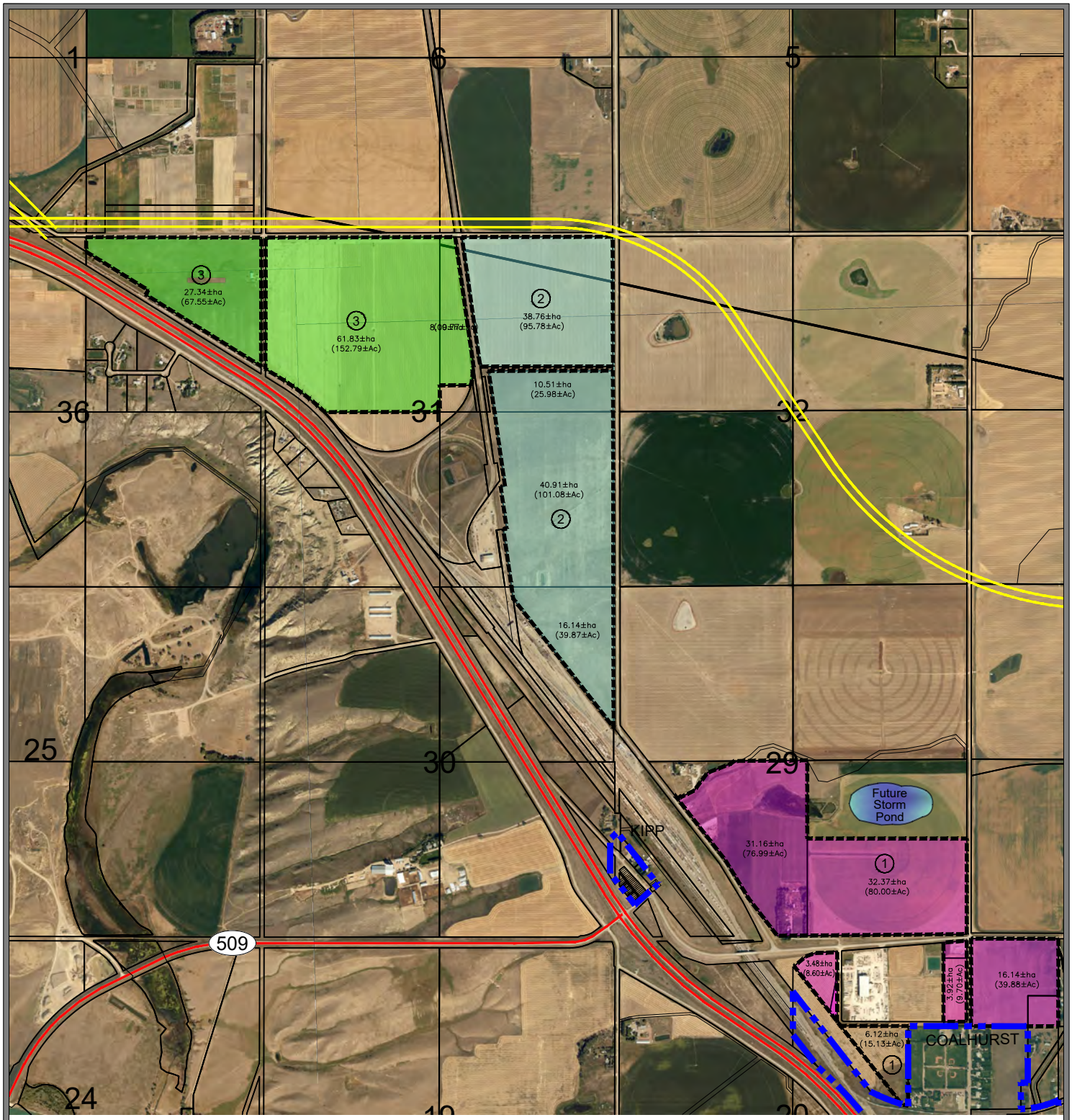

LETHBRIDGE COUNTY INDUSTRIAL - COMMERCIAL LAND USE STRATEGY

GROWTH AREAS - DIAGRAM 14

KIPP-COALHURST AREA

- GROWTH AREA BOUNDARY
- PROPOSED CANAMEX HIGHWAY
- ① PRIORITY - INITIAL
  S29 9-22 W4M & NE20 9-22 W4M
  93.19±ha(230.30±Ac)
- ② SUCCESSIVE - SECONDARY
  NE30 & E31-9-22 W4M
  106.32±ha(262.71±Ac)
- ③ PROSPECTIVE - FUTURE
  NE36-9-23 W4M & N31-9-22 W4M
  97.17±ha(240.11±Ac)

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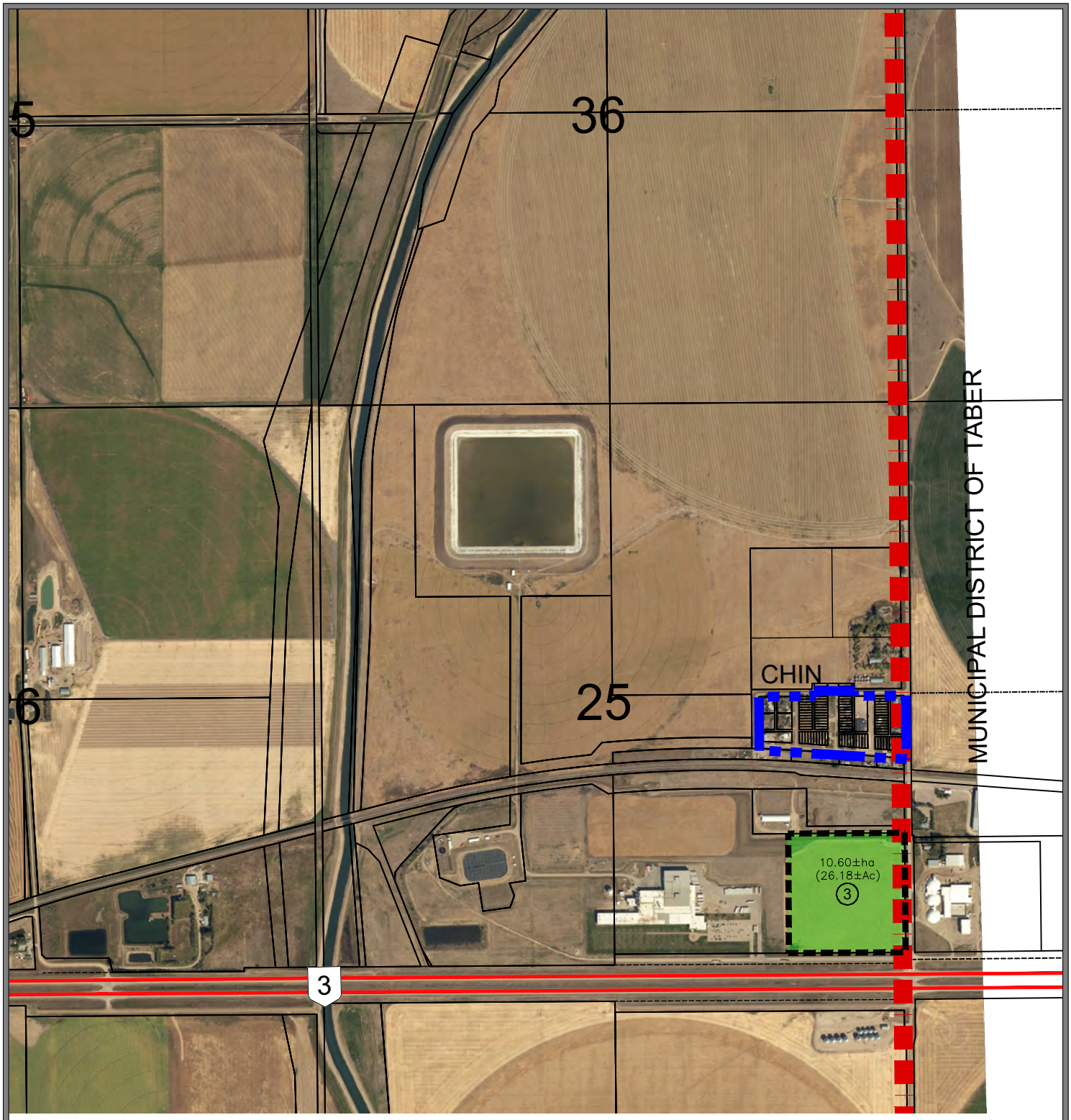

LETHBRIDGE COUNTY INDUSTRIAL -
COMMERCIAL LAND USE STRATEGY

GROWTH AREAS - DIAGRAM 15

CHIN - HIGHWAY 3 AREA

GROWTH AREA BOUNDARY

PROSPECTIVE - FUTURE
③ SE25-9-19 W4M
10.60±ha(26.18±Ac)

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Lethbridge County Industrial-Commercial Land Use Strategy.dwg