Non-Residential Market Analysis

Municipality of East Hants

May 2026

Completed by:

FBM

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EAST HANTS

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Preface

FBM Architecture Ltd. ("FBM") was commissioned by the Municipality of East Hants ("East Hants") to conduct a Non-Residential Market Analysis. The objective of this Analysis is to assist East Hants in establishing a baseline database for future benchmarking and assessment of market supply and demand for non-residential real estate, which includes retail, industrial, and office buildings, parcels and land uses.

The study was carried out over the period September 2025 to May 2026. On-the-ground fieldwork in the study area was carried out in October 2025.

The process of inventory tabulation and reconciling considers the primary building use as the key metric for determining whether the uses are classified as retail, industrial, or office based on the predominant building use.

For the purposes of identifying the business counts by business category, FBM applied its own business classifications for retail and services to provide additional depth to the analysis. Some minor deviations exist based on FBM's professional interpretation of the business category, supported by on-the-ground fieldwork evaluations, photography and videos.

The inventory of businesses presented in this report were obtained from on-the-ground video and photographic fieldwork specifically in East Hants' West, Central and East Sectors. It is important to note that the number of tabulated business does not reflect the full number of registered businesses across East Hants. Rather, the inventory reflects those documented in the identified and mapped Sectors.It also excludes home-based businesses and other businesses that may not have outward facing names on buildings or spaces.

Examples of areas not included in the non-residential inventory include Upper Rawdon, Maitland, Noel, Walton and others along the Fundy Shore. These are important small clusters with further travel times to the major corridors, however the primary focus of this study has largely been on those areas along major corridors that have the highest likelihood of investment attraction over the next 10-years.

This study provides a near-term real-estate analysis, providing projections for the next 10 years; it differs from a long-term growth plan, which typically looks at growth over an approximate 30-year period. Utilizing a 10-year timeline allows for more accurate forecasts.

Demand forecasts are based on "market-driven" methodologies that take into account historic and recent patterns of economic growth, population growth, employment and labour growth, as well as retail spending patterns. These are considered baseline conservative figures and are subject to influences that are often referred to as "economic development-driven" which can in some cases exceed forecasts. Recent cost of living increases (i.e. housing prices, cost of goods, trade tariffs etc) have had an impact on purchasing power as it relates to personal and business spending, so this study has attempted to use conservative forecasts that reflect where possible curtailed population and spending growth.

FBM does not warrant that any estimates contained within the study will be achieved over the identified time horizons but that they have been prepared conscientiously and objectively on the basis of information obtained during the course of this study.

This analysis was conducted by FBM as an objective and independent party. As is customary in an assignment of this type, neither our name nor the material submitted may be included in a prospectus, or part of any printed material, or used in offerings or representations in connection with the sale of lands, businesses or participating interest to the public, without the expressed permission of the Municipality of East Hants.

FBM

2026

Image sources: Unless otherwise noted, all images were taken by FBM.

Acronyms, Terminology & Resources

During the course of this study, a number of industry-recognized acronyms, terminology and resources have been utilized. This section provides clarity to highlight their meaning and/or definition to assist with the understanding of the report:

ACRONYMS (alphabetically listed)

DSTM - Department Store Type Merchandise - An aggregated series of retail categories including comparison goods often found in department stores, such as clothing, electronics, and home furnishings.

FAR - Floor Area Ratio - A metric used to calculate building site coverage, representing the ratio of a building's total floor area to the size of the piece of land upon which it is built.

GBA - Gross Building Area (measured in sq. ft.)

GLA - Gross Leasable Area (measured in sq. ft.)

GMA - Growth Management Area

GRA - Growth Reserve Area

HIAA - Halifax International Airport Authority

HRM - Halifax Regional Municipality

LUB - Land Use Bylaw

MPS - Municipal Planning Strategy

NAICS - North American Industry Classification System - A standard industry-recognized system used to classify businesses by their primary economic activity.

SPS - Secondary Planning Strategy

sf - Square Foot / Square Feet

$/sf - Sales productivity applied for retail businesses measured in dollars per square foot.

TERMINOLOGY (alphabetically listed)

Absorption - The pace at which available real estate (land or building space) is sold or leased in the market over a specific period.

Community Centre - As distinct from a civic project, community-serving retail centres between 100,000 and 400,000 sf of GLA (including pad sites) that typically offer products and services focused on daily shopping needs but may also offering a wider range of merchandise and services than a smaller neighbourhood centre format.

Eco-Industrial Park - A community of businesses on a common industrial property or cluster of properties that collaborate to enhance environmental, economic, and social performance.

Economic Development-Driven Demand - Growth projections based on specific catalysts or multipliers (e.g. mass timber facility in Elmsdale) that can cause growth to exceed standard market trends.

Employment Density - A ratio estimating the number of employees per acre or the amount of building sf per employee/worker.

Flex Industrial - Versatile industrial units ranging from 1,000 to 5,000 sf, that cater to diverse users such as light manufacturers or service contractors.

Infill - The development of vacant or underutilized land within areas that are already largely built out.

Land Utilization - The amount of developed building space measured against the total available land area, used to estimate how efficiently land is being used.

Market-Driven Demand - Forecasts based on historic and recent patterns of economic, population, spending and employment growth.

Market Share or Capture - The percentage of total retail spending potential within a trade area that is captured by local businesses.

Power Centre - Open-air centre between 100,000 and 1,000,000 sf (GLA) that often clusters together large-format retailers ("big boxes").

Retail Leakage - A situation where residents of a specific area spend their retail dollars in businesses outside of that area (e.g. East Hants residents shopping in Halifax).

Trade Area - The geographic area from which a community, business or node draws the majority of its customer sales.

RESOURCES (alphabetically listed)

Bank of Canada
CBRE
Colliers
Endurance Equities & Millbrook First Nation
FBM Architecture Inc.
Google Earth/Google Maps
Google Gemini Artificial Intelligence
Halifax Regional Municipality
Halifax International Airport Authority
International Council of Shopping Centres
KW Commercial Advisors
Manifold Data Mining, Inc.
Municipality of East Hants
Nova Scotia Department of Public Works
QGIS/ArcGIS
Realtor.ca
ReMax
Statistics Canada
Town of Truro

Executive Summary

Introduction

This Non-Residential Market Analysis provides a comprehensive 10-year outlook for the real estate market comprising industrial, retail and office sectors in East Hants. The analysis establishes a comprehensive database for quantifying and benchmarking market supply and demand across industrial, retail, and office land uses through the year 2035. By utilizing a market-driven methodology that accounts for historic and projected economic growth, population shifts, development and employment trends, the analysis offers projections for floorspace and land demand intended to guide strategic investment attraction and land-use planning in core nodes within East Hants.

Current Market Conditions

As of early 2026, East Hants has a non-residential inventory conservatively totaling approximately 2.3 million sf (excluding home-based businesses or other rural outliers).

This inventory is heavily concentrated in the Central Sector which comprises the Highway 102 corridor communities of Elmsdale, Enfield, and Lantz and which functions as East Hants' primary economic engine, housing 67% of the total building inventory and 68% of the estimated employment base.

The non-residential market is characterized by a lean overall vacancy rate of 3.5%, with retail and office vacancies estimated at less than 2%. Industrial uses are prominently along the well-traveled Highway 102 and 101 commuter shed corridors. The combination of low vacancy and industrial prominence illustrates immediate pent-up demand for new supply across the light industrial and commercial land-use categories at varying scales.

Demographic Advantage

East Hants presents a compelling demographic profile that supports sustained non-residential growth.

Population growth accelerated to 2.6% per year between 2021 and 2025, and average household incomes reach an estimated $108,914, which is well above the estimated provincial average of $96,237.

Furthermore, East Hants benefits from a skilled workforce, specifically a high concentration of residents with apprenticeship or trades certificates, providing an advantage for the manufacturing and construction sectors. While an estimated 44% of workers currently commute outside of East Hants, the strategic position along Highways 101 and 102 positions it as a vital regional hub for the flow of goods and services.

10-Year Demand Forecast (to 2035)

To meet the needs of a growing population and evolving regional economy, the study forecasts estimated demand for an estimated 822,676 sf of new floorspace and 251 acres of gross land by 2035 as summarized below:

Land Use	Floorspace	Gross Land Area
Industrial	~543,459 sf	~211 acres
Retail	~239,008 sf	~35 acres
Office	~40,209 sf	~5 acres

Because existing industrial infill land is extremely limited, a large share of the above forecasted demand will necessitate the opening or expansion of new lands in areas like Elmsdale, Lantz and Mount Uniacke to support business growth in East Hants over the coming decade and beyond.

Strategic Allocation and Opportunities

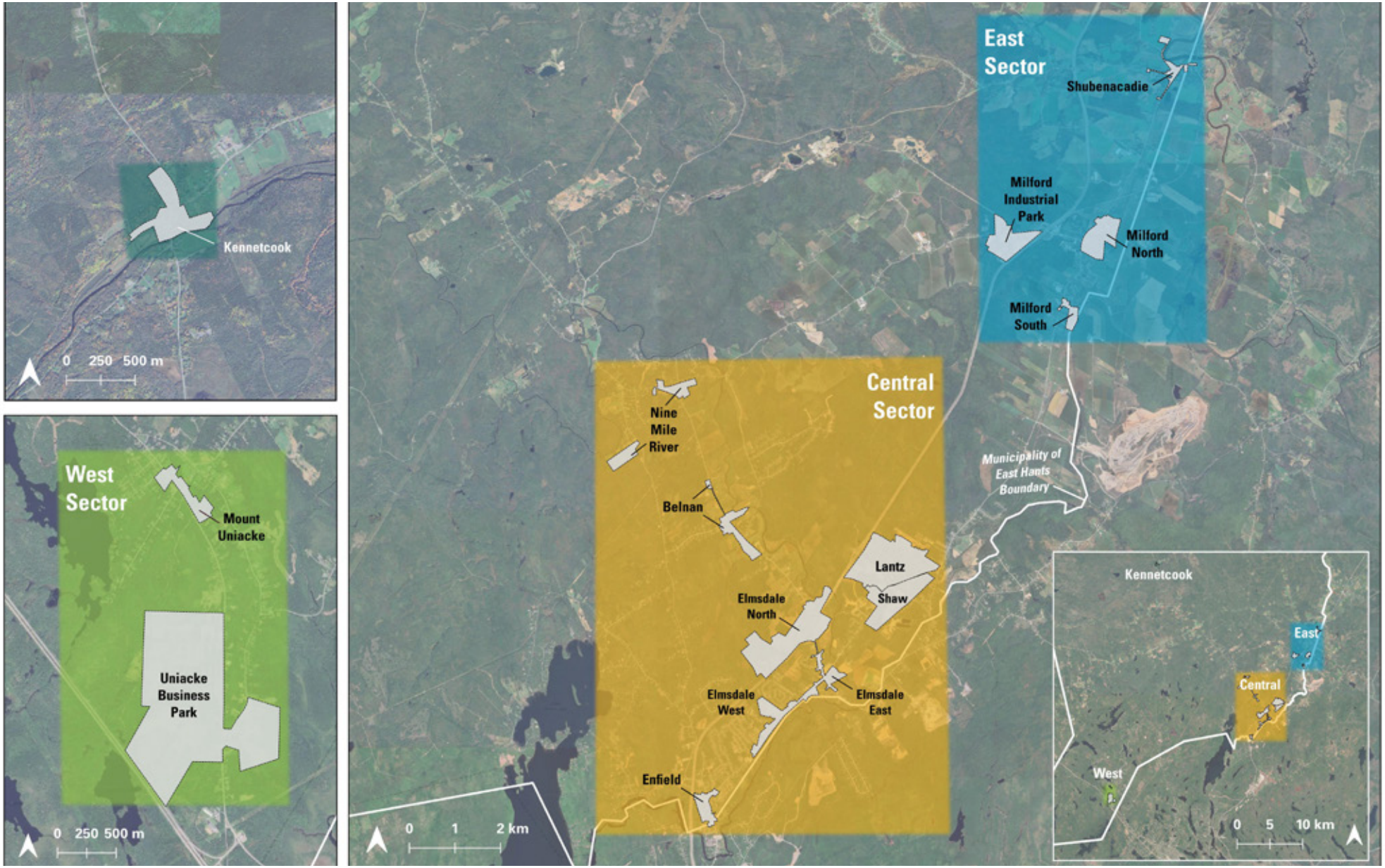
Strategic growth over the next ten years will be overwhelmingly centered in the Central Sector along the Highway 102 corridor and is forecast to capture 75% of all future demand. Key priorities should include expanding industrial lands in Elmsdale North and developing medium-to-large format retail near the Lantz Connector (Exit 8A). Beyond organic growth, East Hants is uniquely positioned to capture Halifax overflow where industrial development that the HRM cannot accommodate due to land shortages, geological challenges, high land values and property taxes will continue.

With continued positive buildout and overflow of demand from Halifax, the Mount Uniacke Business Park 'area' should seek to expand its industrial land base to accommodate growth along the Highway 101 corridor and account for 18% of all future demand. Along with growth in the Central Sector, Mount Uniacke expansion would provide East Hants with an increased offering of investment ready lands along two of the region's primary economic corridors, each with unique locational investment attraction attributes.

Traditional office demand is recovering though may be slow, but office uses are increasingly being integrated into multi-tenant industrial and retail spaces. This trend is likely to accelerate as commuting pressures toward Halifax rise, thereby reinforcing the compatibility of business park opportunitiies along the Highway 101 and 102 corridors.

Non-Residential Location Sectors - West / Central / East with Sub-Nodes

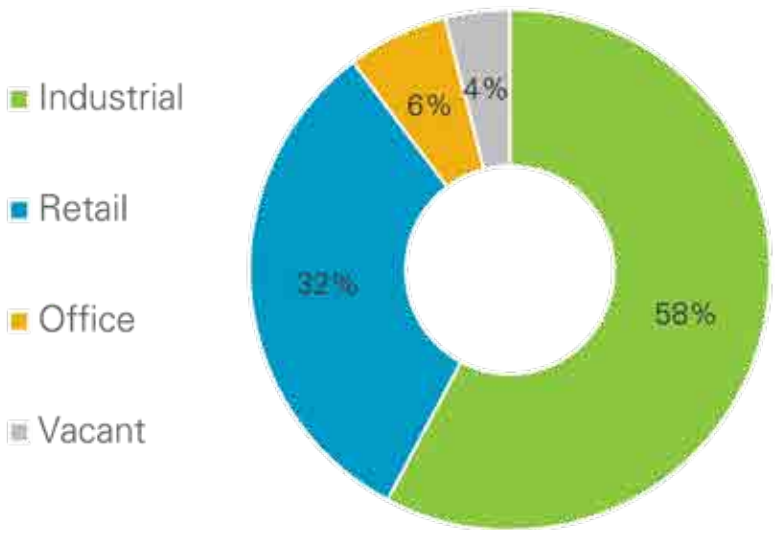
(Source: FBM)



Municipality-wide Inventory Summary

(Source: FBM)

Sector & Sub-Node	Industrial Building Area (sf)	Retail Building Area (sf)	Retail/Auto Building Area (sf)	Office Building Area (sf)	Vacant Building Area (sf)	Vacant Building Area (%)	Vacant Land/Lot Area (ac)	Total Building Area (sf)	Total Land Area (ac)	Overall Land Utilization Estimate
Uniacke Business Park	343,402	37,568	35,570	6,485	31,599	7.0%	11.6	454,624	249.1	4.2%
Mount Uniacke	7,740	16,598	0	0	0	0.0%	0.0	24,338	7.1	7.9%
WEST SUB-TOTAL	***351,141***	***54,166***	***35,570***	***6,485***	***31,599***	**6.6%**	***11.6***	***478,962***	***256.2***	**4.3%**
Nine Mile River	7,973	0	965	0	0	0.0%	0.0	8,938	56.8	0.4%
Belnan	7,960	11,622	2,700	0	0	0.0%	0.0	22,282	19.6	2.6%
Elmsdale N	414,326	314,856	23,535	42,627	24,146	2.9%	1.7	819,489	235.1	8.0%
Elmsdale E	36,526	16,542	14,789	29,246	1,246	1.3%	0.0	98,348	36.1	6.2%
Elmsdale W	99,324	25,126	33,967	15,679	2,257	1.3%	2.0	176,353	71.8	5.6%
Shaw	260,631	16,879	0	0	23,754	7.9%	0.0	301,264	103.9	6.7%
Lantz	4,495	0	0	3,741	0	0.0%	0.0	8,236	2.1	9.2%
Enfield	1,142	61,636	0	13,126	1,739	2.2%	0.0	77,644	24.6	7.2%
CENTRAL SUB-TOTAL	***832,378***	***446,661***	***75,956***	***104,419***	***53,142***	**3.5%**	***3.7***	***1,512,555***	***550.0***	**6.3%**
Kennetcook	0	20,393	0	3,825	0	0.0%	0.0	24,217	11.9	4.7%
KENNETCOOK SUB-TOTAL	***0***	***20,393***	***0***	***3,825***	***0***	**0.0%**	***0***	***24,217***	***11.9***	**4.7%**
Milford Industrial Park	56,966	7,982	29,934	0	0	0.0%	20.1	94,881	120.4	1.8%
Milford N	24,008	18,732	0	0	0	0.0%	0.0	42,739	32.4	3.0%
Milford S	21,969	0	0	0	2,504	10.2%	0.0	24,473	22.3	2.5%
Shubenacadie	19,653	34,374	4,437	27,157	3,432	3.9%	0.1	89,054	15.7	13.0%
EAST SUB-TOTAL	***122,596***	***61,088***	***34,370***	***27,157***	***5,936***	**2.4%**	***20.2***	***251,147***	***214.5***	**3.0%**
Total	1,306,115	582,307	145,896	141,886	90,677	4.0%	35.5	2,266,881	1,008.9	5.2%



Municipality-wide Inventory Summary Share of Building Floorspace by Primary Use

(Source: FBM)

Sector Clusters Inventory & Employment Summary

(Source: FBM)

	Central Sector	Share of Municipal Total	West Sector	Share of Municipal Total	East Sector	Share of Municipal Total	Kennetcook	Share of Municipal Total
Business Count	190	61%	51	17%	47	15%	10	3%
Home Based Businesses (est)	13	59%	2	9%	6	27%	1	5%
Inventory (sf)	1,512,555	67%	478,962	21%	251,147	11%	24,217	1%
Employment (persons) - see bottom for industry breakdown	1,793	68%	495	19%	309	12%	54	2%
Vacant (sf)	53,142	59%	31,599	35%	5,936	7%	0	0%
Vacant (%) / *Index to Municipal Average*	3.5%	*88%*	6.6%	*165%*	2.4%	*59%*	0.0%	*0%*
Industrial Inventory (sf)	832,378	64%	351,141	27%	122,596	9%	0	0%
Industrial Employment	609	56%	382	35%	102	9%	0	0%
Employment Ratio (sf/emp)	1,366		919		1,208			
Retail Inventory (sf)	522,616	72%	89,736	12%	95,458	13%	20,393	3%
Retail Employment	1,011	78%	104	8%	144	11%	43	3%
Employment Ratio (sf/emp)	517		865		665		476	
Office Inventory (sf)	104,419	74%	6,485	5%	27,157	19%	3,825	3%
Office Employment	261	76%	9	3%	64	18%	11	3%
Employment Ratio (sf/emp)	400		690		426		341	
Land Utilization / *Index to Municipal Average*	7.3%	*143.9%*	4.3%	*84.2%*	3.0%	*59.4%*	4.9%	*95.2%*

Employment By NAICS Code	Central Sector	West Sector	East Sector	Kennetcook
Agriculture, Forestry, Fishing and Hunting	11	0	0	0
Mining, Quarrying, and Oil and Gas Extraction	0	1	0	0
Utilities	3	0	0	0
Construction	79	96	22	0
Manufacturing	305	246	55	0
Wholesale Trade	90	7	18	0
Retail Trade	708	40	90	38
Transportation and Warehousing	2	3	6	0
Information and Cultural Industries	1	8	0	0
Finance and Insurance	69	0	10	5
Real Estate and Rental and Leasing	28	9	1	0
Professional, Scientific and Technical Services	62	0	7	7
Management of Companies and Enterprises	0	0	0	0
Administrative and Support, Waste Management and Remediation Services	80	2	0	0
Educational Services	3	0	0	0
Health Care and Social Assistance	104	0	22	0
Arts, Entertainment and Recreation	30	4	6	0
Accommodation and Food Services	148	20	12	5
Other Services (Except Public Administration)	124	59	39	0
Public Administration	2	0	21	0

Municipality of East Hants 10-Year Demand Forecast Allocation to Year 2035

Total New Demand Allocation by 2035 (sf)	Industrial East Hants Study Area				Retail East Hants Study Area				Office East Hants Study Area			
	% Share of Demand	Share of Demand (sf)	Site Coverage Factor (%)	Net Land Area (acres)	% Share of Demand	Share of Demand (sf)	Site Coverage Factor (%)	Net Land Area (acres)	% Share of Demand	Share of Demand (sf)	Site Coverage Factor (%)	Net Land Area (acres)
West Sector **Sub-Node**	**26%**	**141,299**	**5%**	**69**	4%	**9,560**	**15%**	**1**	0%	**0**	**n/a**	**0**
Uniacke Business Park Existing Infill	6%	32,608	4%	18.7	0%	0	15%	0.0	0%	0	20%	0.0
Uniacke Business Park New Land	0%	0	4%	0.0	0%	0	15%	0.0	0%	0	20%	0.0
Mount Uniacke Existing Infill	0%	0	4%	0.0	2%	4,780	15%	0.7	0%	0	20%	0.0
Mount Uniacke New Land	20%	108,692	5%	49.9	2%	4,780	15%	0.7	0%	0	20%	0.0
Central Sector **Sub-Node**	**66%**	**358,683**	**7%**	**118**	**93%**	**222,277**	**16%**	**33**	**90%**	**36,188**	**20%**	**4**
Nine Mile River	0%	0	7%	0.0	0%	0	20%	0.0	0%	0	20%	0.0
Belnan	0%	0	7%	0.0	0%	0	20%	0.0	5%	2,010	20%	0.2
Elmsdale N Existing Infill	6%	32,608	7%	10.7	0%	0	20%	0.0	10%	4,021	20%	0.5
Elmsdale N New Land	60%	326,075	7%	106.9	4%	9,560	15%	1.5	15%	6,031	20%	0.7
Elmsdale E Existing Infill	0%	0	7%	0.0	5%	11,950	20%	1.4	10%	4,021	20%	0.5
Elmsdale W Existing Infill	0%	0	7%	0.0	0%	0	20%	0.0	10%	4,021	20%	0.5
Shaw Existing Infill	0%	0	7%	0.0	5%	11,950	20%	1.4	0%	0	20%	0.0
Lantz Existing Infill	0%	0	7%	0.0	60%	143,405	15%	21.9	20%	8,042	20%	0.9
Lantz New Land (SPS)	0%	0	7%	0.0	15%	35,851	15%	5.5	15%	6,031	20%	0.7
Enfield Existing Infill	0%	0	7%	0.0	4%	9,560	20%	1.1	5%	2,010	20%	0.2
East Sector **Sub-Node**	**7%**	**38,042**	**4%**	**22**	**2%**	**4,780**	**15%**	**1**	**10%**	**4,021**	**20%**	**0.5**
Milford Industrial Park Existing Infill	7%	38,042	4%	21.8	0%	0	15%	0.0	0%	0	20%	0.0
Milford North Existing Infill	0%	0	4%	0.0	0%	0	15%	0.0	0%	0	20%	0.0
Milford South Existing Infill	0%	0	4%	0.0	0%	0	15%	0.0	0%	0	20%	0.0
Shubenacadie Existing Infill	0%	0	4%	0.0	2%	4,780	15%	0.7	10%	4,021	20%	0.5
Kennetcook **Sub-Node**	**1%**	**5,435**	**5%**	**2**	**1%**	**2,390**	**15%**	**0.4**	**0%**	**0**	**n/a**	**0**
Kennetcook & Surrounds	1%	5,435	5%	2.5	1%	2,390	15%	0.4	0%	0	20%	0.0
Total	**100%**	**543,459**	**5.9%**	**211**	**100%**	**239,008**	**15.5%**	**35**	**100%**	**40,209**	**20.0%**	**5**

The East Sector covers the communities of Milford and Shubenacadie and is forecast to accommodate demand of 6% of future industrial, retail and office space premised on smaller localized businesses.

Conclusion

Beyond baseline market-driven projections, "economic development-driven" factors act as potential multipliers that could enable East Hants' growth to exceed conservative estimates. A primary catalyst is the persistent industrial land supply gap in the HRM, where limited market choice and topographical challenges in the Burnside area make assembling large parcels (50+ acres) difficult. Add to this the proximity of East Hants to the growing Halifax International Airport.

Though East Hants has its own dwindling supply of industrial lands, it is well-positioned to capture regional "overflow" by providing more affordable, shovel-ready land for large-scale manufacturing and logistics. Furthermore, regional projects like the proposed ScotiaPort inland terminal and the comprehensive rezoning of Aerotech Business Park to more permissive industrial uses could shift regional supply chains, further increasing demand for supportive industrial space within East Hants, where housing for employees is more affordable and closer to their place of employment. As the HRM region grows, commuting patterns will change and become more congested, further presenting an opportunity for East Hants to be a preferred business and living community.

To accomplish the goal of accommodating regional overflow, East Hants must continue to identify future compatible lands for light and medium industrial uses and business parks. Areas such as Elmsdale, Milford and Mount Uniacke represent important existing clusters around which future land should be identified and planned for the future beyond the 545,000 sf and approximate 200 acres identified in this study's 10-year horizon.

On the commercial side, strategic infrastructure investments like the Lantz Connector (Exit 8A) serve as major anchors capable of realizing retail and commercial demand far faster than organic population growth alone would suggest.

If East Hants successfully attracts new-to-market junior and large-format retailers to sub-nodes like Elmsdale North and Lantz, it could noticeably reduce existing retail leakage to Halifax or Truro. Additionally, the "blurring" of land uses where office demand is integrated into multi-tenant retail and industrial formats could lead to higher-than-expected absorption rates as commuting pressures to Halifax, Bedford or Dartmouth drive a shift toward local, flexible workspaces.

East Hants is evolving from a "local convenience market" or "bedroom community" into a self-sufficient regional destination with commensurate demand and need for commercial and industrial employment growth. To capitalize on this, East Hants must focus on providing shovel-ready land in the Central Sector, particularly in the Enfield, Elmsdale, Lantz corridor while encouraging higher-density, compact forms of industrial and commercial development to maximize land efficiency and attractiveness for multiple industry format needs.

Section 1: Introduction

1.0 Introduction

1.1 Scope of Study

FBM was commissioned to conduct a Non-Residential Market Analysis for East Hants. The Analysis was carried out over the period September 2025 to May 2026. On-the-ground fieldwork in the study area (refer to **Figure 1-1)** was carried out in October 2025.

This Non-Residential Market Analysis is intended to:

1. Provide a baseline inventory for East Hants' non-residential real estate.
2. Perform an analysis of current local market demand, market gaps, and opportunities.
3. Recommend directions for East Hants to support future demand and growth forecasts.
4. Advise on the advantages of opportunities presented in industrial and commercial sectors.

By identifying gaps in the commercial and industrial market, East Hants can position itself better to identify investment and business attraction targets.

1.2 Report Structure

This report contains the following sections:

Section 1 – Introduction: Introduces the study scope/objectives and structure.

Section 2 - Regional and Local Context: Provides an overview of key location factors affecting the market, including transportation, development, and relevant Municipal plans and studies.

Section 3 - Regional Influences: Discusses major commercial and industrial developments (past, present, and future) with a major focus along the 100-kilometre Highway 102 economic corridor stretching from Halifax in the south to Truro and Colchester County to the north.

Section 4 - Trends and Best Practices: Provides an overview of commercial and industrial trends shaping business, consumer and investor sentiment and activity.

Section 5 - Demographic Profile and Population Projection: Analyzes the demographic profile of East Hants as a basis to developing employment, labour and population demand forecasts.

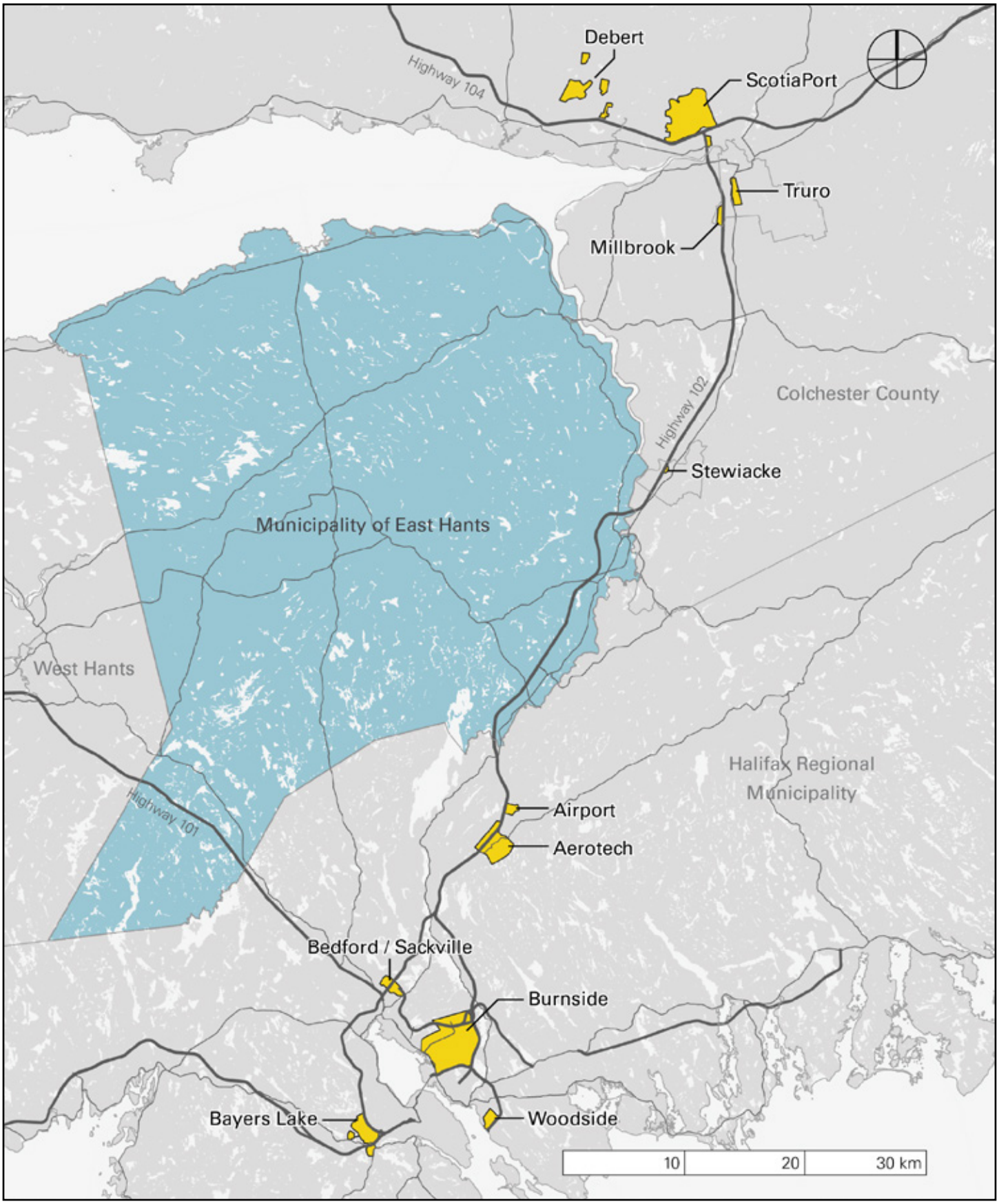
Section 6 - Business Inventory: Identifies and profiles East Hants' key sectors and nodes, documenting critical market figures ranging from non-residential building floorspace, land inventory and site utilization, vacancy, business counts, and industry-based NAICS business classifications.

Section 7 – Demand Analysis: Estimates future demand for retail, office, and industrial land uses over the next ten years.

Section 8 – Demand Allocation Summary: Provides an overview of where forecasted retail, office, and industrial demand could be most compatible to accommodate growth and investment attraction needs.

Figure 1-1. Study Area Context Map for the Municipality of East Hants

(Source: FBM)



Section 2: Regional and Local Context

2.0 Regional and Local Context

2.1 Introduction

Location factors are an essential foundation to commercial and industrial success, and an understanding of these factors can help create the necessary conditions for attracting and retaining businesses in a community. This section identifies the regional and local characteristics of East Hants, as they relate to the attraction and retention of commercial and industrial businesses.

2.2 Regional and Local Context

East Hants serves as a prime corridor between Truro, HRM and Annapolis Valley. East Hants' economic and residential growth is bolstered by its direct access to two major transport routes: Highway 102, which is the province's primary north-south corridor and Highway 101, which connects the region to the Annapolis Valley. Additionally, Nova Scotia Trunk 1, and Trunk 2 serve as key corridors in East Hants, offering connections between communities like Mount Uniacke, Enfield, Elmsdale, Shubenacadie and Milford.

Within East Hants, there are two business parks and one industrial park: Elmsdale Business Park, Uniacke Business Park, and Milford Industrial Park. These Business and Industrial Parks all serve as important nodes for commercial and industrial activities. The Elmsdale Business Park is serviced by the municipal water and wastewater system, and the Uniacke Business Park and the Milford Industrial Park has on-site services available[1].

2.3 Relevant Plans and Policies

This section examines relevant plans and policies that shape the current state of land use and growth planning in East Hants.

Municipal Planning Strategy (MPS)

The most recent **Municipal Planning Strategy** (MPS) adopted in 2023 is set to be updated over the period 2026 - 2028 and serves as a primary planning document in East Hants, along with the accompanying Land Use Bylaw (LUB) and the Subdivision Bylaw.

The MPS is guided by the following eight "Community Priorities" that were identified during engagements with residents. While all these Priorities are interconnected with each other, the Priorities 2, 3, 5 & 6 in the MPS (highlighted in **bold blue**) offer particular relevance to this Market Analysis:

- **Priority 1 - Develop parks, open space and recreation facilities in a Municipal and regional network**: Open spaces should be designed and programmed to serve local needs by connecting between communities, especially village core areas. Where possible, regional active transportation and open space connections will connect East Hants to neighbouring areas.
- **Priority 2 - Support well-designed, pedestrian-friendly small town centres:** Communities including Mount Uniacke, Shubenacadie, Enfield, Elmsdale, Milford, and Lantz were identified as "village cores" in East Hants. The MPS is committed to making these village cores walkable while offering a sense of urban character.
- **Priority 3 - Foster economic development, creative entrepreneurship, and home-based commerce:** The MPS recognizes that continuous economic growth is key to offer a prosperous and vibrant community environment in East Hants. The MPS especially highlights the importance of supporting entrepreneurship and home-based businesses, as well as protecting agricultural land.
- **Priority 4 - Develop healthy transportation networks including walking and cycling**: The MPS supports creating an active transportation network in the existing corridor, recognizing that East Hants' main roads have been experiencing heavy traffic due to reliance on vehicles to get around.
- **Priority 5 - Develop in a manner which is compact, environmentally and fiscally sustainable:** The MPS is committed to encouraging compact and infill developments to achieve an efficient use of land and to preserve the existing natural environment. The MPS also highlights the importance of offering an on-site stormwater management system and encouraging energy-efficient design.
- **Priority 6 - Mix compatible land uses and buildings, and provide transitions between different areas of density:** The MPS emphasizes that a mixed-use community development can directly contribute to reducing distance between home, work, and shopping and creating an accessible community environment for pedestrians and cyclists. The MPS highlights the importance of offering a gradual transition between low-density residential neighbourhoods and higher-density neighbourhoods.

The MPS highlights important roles of 'Growth Management Areas' and 'Growth Reserve Areas' in the following policies:

1 Municipality of East Hants Official Website. (n.d.). *Business.*

- **GM1**: *Council shall establish Growth Management Areas for the purpose of containing urban development in areas where water and wastewater are available, and to optimize the density of development for maximum efficiency in providing services and infrastructure.*

- **GM18**: *Council shall establish Growth Reserve Areas for the purpose of directing future growth into appropriate areas for future residential or commercial development.*

Secondary Planning Strategies

East Hants has two recently completed Secondary Planning Strategies (SPS): the *Uniacke SPS* and the *Lantz SPS*. A new Enfield SPS is set to commence in Spring 2026.

The **Uniacke SPS** was officially approved in February 2025 (**Figure 2-2**). The SPS made several recommendations, including completing a water and wastewater servicing feasibility study and expanding commercial and light industrial/business opportunities. The Strategy highlighted the need to expand the Regional Commercial (RC) Zone, recognizing the geographical constraints to expand the Uniacke Business Park and residents' needs for enhanced access to daycare facilities, food establishments, and grocery stores. The Strategy also indicated a possible need to create a new interchange in the Lakelands and Ardoise area.

The **Lantz SPS** was completed in August 2025 to provide a comprehensive regulatory framework for the Lantz Growth Reserve Area and adjacent properties (**Figure 2-2**). Located in along Highway 102, the Lantz SPS area is considered compatible for larger commercial and business park activities. The core element of the proposed land use concept plan was to offer a walkable "Urban Centre Area" as well as a "Commercial Urban Centre Area", which would serve as a primary neighbourhood for commercial activities. The concept plan also offers the Business Park and Institutional Use area accommodating a variety of retail, office, institutional, and light industrial uses to provide local educational and employment opportunities, as well as the possibility of a longer-term northern Highway 102 interchange.

Timing of development for the Lantz SPS is expected to be towards the latter part of this study's 10-year horizon but regardless, the SPS is important for future growth in terms of much needed non-residential land allocation.

The **Enfield SPS** is set to begin in Spring 2026 with a focus on the Horne Lake Settement and Growth Reserve Area along the Highway 102 corridor.

Figure 2-1. Study Area Location for the Uniacke Secondary Planning Strategy (Highlighted in Yellow)

(Source: Uniacke Secondary Planning Strategy)

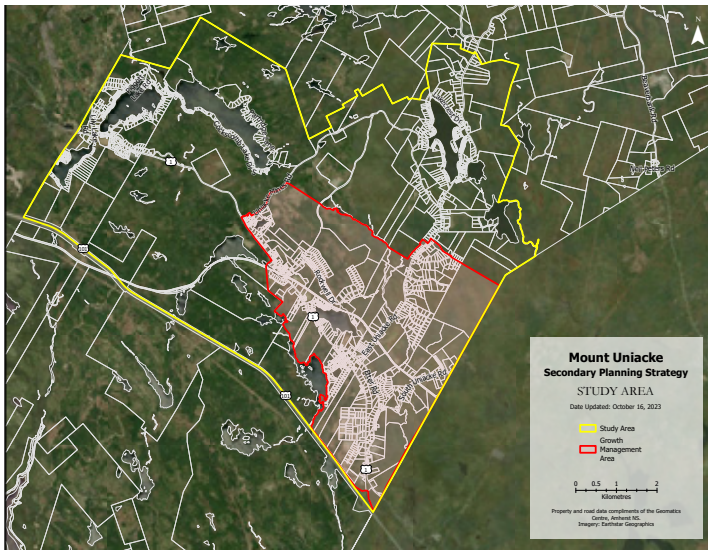


Figure 2-2. Study Area Location for the Lantz Secondary Planning Strategy (Highlighted in Yellow)

(Source: Lantz Secondary Planning Strategy)

Other Plans and Studies for the Town

Completed in 2014, the **Growth Management Review** assessed the capacity of Growth Management Areas (GMAs) and Growth Reserve Areas (GRAs) to support strategic growth over 30 years. The Review assessed existing land uses, infrastructure, population densities, remaining serviceable land, "soft" services (like schools and emergency services), transportation, and environmental factors to offer directions to support long-term sustainable growth.

The Review also incorporated findings from the Sewer Capacity Study (completed in 2014) to address the fiscal implications of wastewater infrastructure and potential upgrades.

Key findings from the Review included the following:

- **Regional Serviceable Boundary GMA**: This area includes the serviced communities of Enfield, Elmsdale, and Lantz, and offers opportunities to accommodate a variety of residential, commercial, institutional, and industrial developments. The report recommends that all future developments in this area use a gross population density of 45 persons per hectare. This is meant to encourage the development of "complete communities" that provide a mix of services and opportunities for residents to live, work, and be active nearby. The Review also recommended that East Hants should continue to apply Local Improvement Charges to support the upgrade and expansion of the wastewater and transmission systems.

- **Milford GMA**: This area includes the Milford Industrial Park, which is located on the west of Highway 102 (**Figure 2-3**). The Review indicated that while municipal wastewater services are available within the GMA boundary, water service is only available on-site for residential and commercial development. The Review suggested providing central water supply to this GMA to support increased density.

- **Growth Reserve Areas (GRAs)**: The Review identified the Belnan GRA, the Lantz GRA, and the Grand Lake/Horne Settlement GRA as additional areas for future commercial and industrial developments. These GRAs offer large supplies of undeveloped lands, although the desired density for these areas will depend on municipal water and wastewater servicing capacity.

A **Retail Market Analysis** for East Hants was completed in 2018. The Analysis documented the retail inventory in East Hants, identified the trade area served by that retail stock, and estimated East Hants' retail demand (i.e., spending). It aimed to assist East Hants in supporting and retaining existing retailers, as well as helping to attract new retail and business growth.

In 2018, East Hants had an approximately 453,000 sf of retail floor space with a vacancy rate of around 3%. This was considered to be an especially low vacancy rate, suggesting there could be demand for more retail space.

The report noted that the Elmsdale centre is located roughly halfway between two strong retail poles to the Halifax-Dartmouth metropolitan area (to the south) and Truro (to the north). The retail trade area (the area from which East Hants' retail sales are largely generated) is centred on the Highway 102 corridor, between Halifax and Truro, and draws from the surrounding rural and semi-rural hinterland. Traffic along Highway 102 has continually increased, making East Hants even more attractive to prospective retailers. The area also has benefits from increasing economic activity at the nearby HIA.

The report concluded that East Hants (especially Elmsdale), is already positioned as a "strong local convenience destination", and was on the verge of becoming a more self-sufficient retail market, and would be suited for "the gradual introduction of more merchandise and food and beverage offerings" as well as "specifically-targeted comparison or DSTM (department store-type merchandise) categories and stores".

Figure 2-3. Milford Growth Management Area Boundary

(Source: Municipality of East Hants Municipal Planning Strategy)

The **Conceptual Main Street Design for Elmsdale's Route 214** (2022) outlined a 10-year streetscape vision to transform a portion of Route 214 in Elmsdale into a "Main Street", with the aim of prioritizing pedestrian and community life while accommodating vehicular traffic.

The Consultant Team developed three Concept Design Options. All proposed options included walking and cycling paths on both sides.

- **Concept A**: Maintains the current two-lane roadway with improved walking and cycling paths on both sides. This concept is likely to be the least expensive option as less paving is required.
- **Concept B**: Adds a third, two-way centre turn lane. This option may improve traffic flow but makes crossings wider, which can result in speeding vehicle traffic.
- **Concept C**: Offers a "flex" lane on the west side for on-site parking, loading, and bus stops. The report highlighted that the flex lane could offer an increased sense of safety, as parked cars would create a buffer from moving vehicles.

The report concluded that Concept C is preferred as it aligned more closely with municipal goals including enhanced access to public transportation and open spaces. **Figure 2-4** shows the visualization of Route 214 featuring some of the proposed streetscape design elements.

The **East Hants Economic Development Plan 2023-2027** is a four-year plan that was built upon the *East Hants Strategic Plan 2021-2024* and the former *Strategic Economic Plan 2015-2020*.

The Plan is guided by the following Vision: "East Hants is a thriving and growing community with vibrant business districts and a robust, skilled workforce"[2].

2 *East Hants Economic Development Plan 2023-2027*. Page 6.

Based on this Vision, the Plan has two goals with measurable targets:

1. Grow Investment – Grow commercial property tax assessment to $200,000,000.
2. Support Workforce Development – Increase population to 25,000 residents.

For the first goal, the Plan offered two objectives: attracting businesses and supporting businesses. Key actions for encouraging investment included expanding Municipally owned business parks, exploring opportunities to acquire land for future business park developments, strengthening local, regional, and national partnerships, and supporting businesses that offer sustainable operation practices.

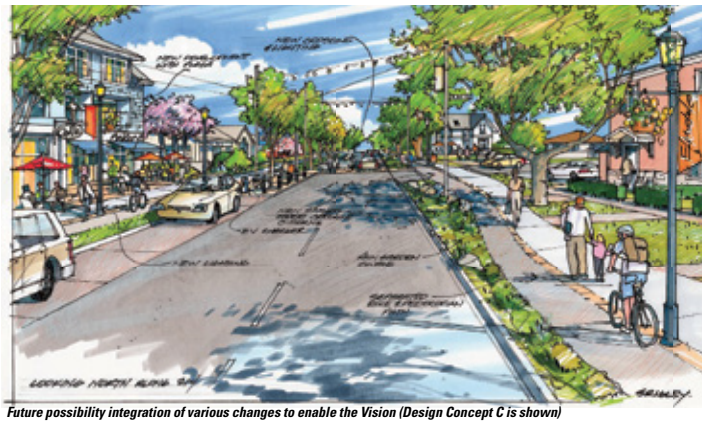
Prepared for the Nova Scotia Department of Public Works and completed by Griffin Transportation Group Inc., the **East Hants Corridor Area Traffic Study** (2024) provides a long-term strategy for roadway capacity in the growing communities of East Hants. The study forecasts population and employment growth to project future traffic volumes and identify necessary road infrastructure upgrades through 2043 and beyond. The study recommends building a new Highway 102 interchange in northern Lantz as the preferred option to manage future traffic, presenting a feasible alternative to widening Trunk 2. This recommendation is reflected in the *Lantz Secondary Planning Strategy*.

The **Village Core (VC) Zone Density Increase** is adopted by Council as one of the nine initiatives identified in the Housing Accelerator Fund (HAF) agreement. While the primary objective of this initiative is to increase as-of-right dwelling units from 12 dwelling units to 16 in the Village Core (VC) Zone, the Staff Report recognizes the importance of integrating commercial uses in this Zone.

Figure 2-4. Before and After Visualization of Route 214 as Elmsdale's Main Street

(Source: Conceptual Main Street Design for Elmsdale's Route 214; Artist credit for Placemaker: Cal Srigley)

Current Route 214 (Looking to the North)



Future possibility integration of various changes to enable the Vision (Design Concept C is shown)

The Staff Report recommended that at least 75% of the ground floor facing frontage should be for commercial uses, which would apply for buildings with 13 to 16 dwelling units.

Another key recommendation was exempting this commercial requirement for existing flag lots to ensure that all commercial uses in the Village Core Zone would be compatible with each other.

2.4 Development and Building Permit History

Building permit activity can provide empirical evidence of growth dynamics necessary to support commercial and industrial opportunities.

Figure 2-5 and **Figure 2-6** illustrate the historic volume of commercial and industrial permits in East Hants over the past five years (2020 to September 2025). The numbers of permits suggest that both commercial and industrial development activities have rebounded after the decline in 2022.

Commercial Development

Commercial development in this context includes uses such as restaurants, markets, medical offices, and personal care services. From January 1, 2025 to September 18, 2025, there were 25 commercial building permits and 14 commercial development permits that received a full permit. The total construction value thus far is $12,711,630. Commercial development activity is most concentrated in District 2, both in terms of number of permits issued (16) and the construction value ($10,788,649).

From 2023 to 2024, the number of both building and development permits increased, suggesting a promising trend for commercial development. Notably, the number of development permits issued in 2025 already surpassed the number in 2024.

Industrial Development

Compared to the previous five years, industrial development has been less active in East Hants. From January 1, 2025 to September 18, 2025, there have been two building permits and one development permit that have been issued. The total construction value among all issued industrial developments was $695,526. Like commercial developments, District 2 had the highest total construction value and the number of permits issued.

2.5 Traffic Counts

Transportation attributes (e.g. counts, interchanges, road network connectivity etc) are important considerations in investment attraction for retail, commercial and industrial attraction.

An understanding of these attributes can help create the necessary conditions for attracting and retaining businesses and residents to locate in a community.

This section presents traffic counts as provided by the *East Hants Corridor Area Traffic Study* prepared by Nova Scotia Department of Public Works in March 2024. **Figure 2-7** presents peak hour traffic volume in morning (AM) and afternoon (PM) times as of June 2023 in the following four intersections:

- Trunk 2 and Milford Road;
- Trunk 2 and Lantz Connector Road;
- Trunk 2 and Route 214 / Elmsdale Road; and
- Trunk 2 and Old Enfield Road.

The map suggests that traffic coming from the north generally has larger traffic counts in the morning peak hours, while the traffic counts coming from the south tend to peak in the afternoon peak hours.

Enfield and Elmsdale have larger peak hour traffic volume, though specific traffic counts vary between morning and afternoon peak hours. Elmsdale generally has larger traffic volume in the afternoon, particularly for those coming from the south, while the traffic count in Enfield showed smaller gaps in traffic volume between morning and afternoon peak hours.

Highway 101 & Trunk 1 Corridor Traffic Counts

According to the latest 2026 datasets by the Province of Nova Scotia for Highway 101, the stretch of highway from Exit 2a Margeson Dr interchange to Exit 3 Mount Uniacke interchange has an AADT of 15,700 vehicles.

For the Trunk 1 route located 1.5 km west of the Halifax/Hants County Line nearest the Mount Uniacke Business Park, the AADT is in the range of 6,000 vehicles.

The province is continually researching, engaging in conversations with municipalities and preparing plans to ensure that the flow of goods and residents are balanced to meet growth while accommodating safe and efficient transportation with economic benefit.

Figure 2-5. Total Number of Commercial Building and Development Permits (2020 to September 2025)

(Source: Municipality of East Hants)

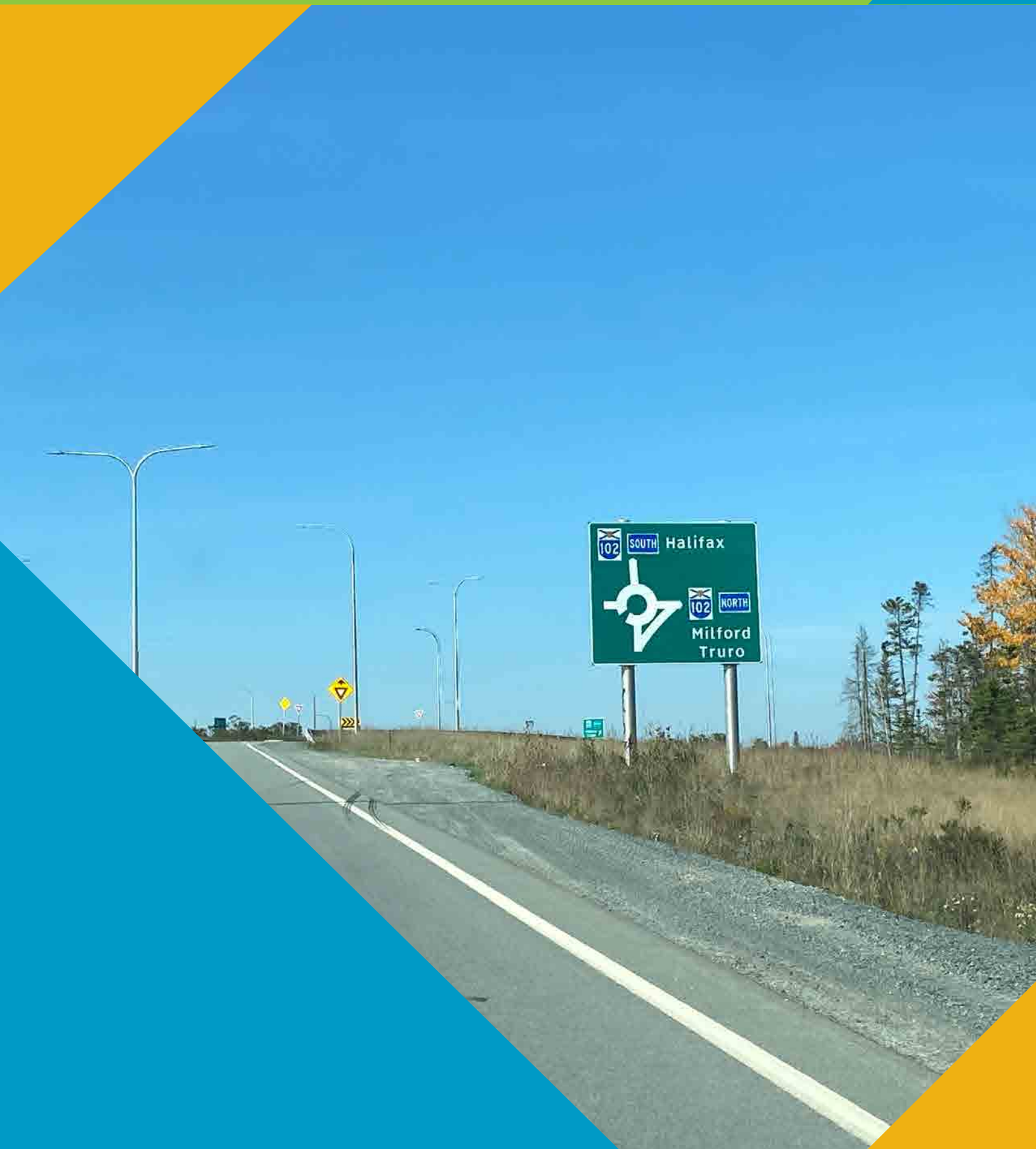
Figure 2-6. Total Number of Industrial Building and Development Permits (2020 to September 2025)

(Source: Municipality of East Hants)

Figure 2-7. Municipality of East Hants Local Traffic Peak Hour Volume, June 2023

(Source: FBM with data from East Hants Corridor Area Traffic Study)

Section 3: Regional Influences



3.0 Regional Influences

3.1 Introduction

Future prospects for East Hants are heavily influenced by regional activities, particularly in areas along Highway 102, as well as Highway 101. This section discusses major commercial and industrial developments (past, present, and future) predominantly along the 100-kilometre Highway 102 economic corridor stretching from Halifax in the south to Colchester County to the north. For the purposes of this section, Halifax is referenced as a specific competitive area (like Dartmouth, Bedford or Sackville), unless specifically referenced in the context of the Halifax Regional Municipality (HRM).

3.2 Airport area

Halifax International Airport (HIA) is located at Exit 6 of Highway 102 around 6 km south of East Hants' municipal boundary in Enfield. Nearly four million passengers passed through HIA in 2024, making it the eighth-busiest airport in Canada ("Halifax Stanfield's Passenger Volumes Take Off in 2024."). The airport and its associated commercial and industrial developments represents the nearest major economic influence beyond East Hants' border.

Aerotech Business Park

Aerotech Business Park (refer to **Figure 3-2**) comprises around 2,400 acres of land adjacent to HIA. However, the large majority of this area remains undeveloped. According to the HRM, the park employs around 550 people at 17 enterprises.

The business park was initially conceived as a high-technology airport industrial park catering to the aerospace industry. Plans called for sites of around 10 acres, which are large enough to accommodate aircraft and aircraft component manufacturing and overhaul plants. Development of the park formed part of efforts to diversify Nova Scotia's economy by attracting high-tech companies, offsetting the decline of older industries. The first tenants were Pratt and Whitney Canada, which completed a 124,000 sf manufacturing plant in 1987, and a Litton Systems radar factory in1988. The park also has one multi-tenant building, a two-storey office building at 209 Aerotech Drive.

Aerotech Business Park remains largely undeveloped due to restrictions on development imposed due to the limitations of the water and wastewater systems as well as zoning restrictions. Halifax Water has since upgraded both of the water systems helping to pave the way for future development. While the new Aerotech Connector at Exit 6, which opened in 2025 connects the community of Fall River to Highway 102 makes access to the Aerotech Business Park more convenient, it also makes access to the Highway 102 corridor to Enfield, Elmsdale and Lantz more convenient and accessible for potential workforce.

Figure 3-1. Highway 102 at Halifax International Airport

(Source: FBM)

Aerotech Business Park	
Area	2,400 acres (approx.)
Positioning	Aerospace technology and manufacturing (original) General industrial park with supporting commercial uses (future)
Businesses/tenants	17
Management	Halifax Regional Municipality
Transportation	Highway 102 (direct access), public transit
Expandability	Approx. 1,700 gross acres with around 130 net acres of serviced, shovel-ready land available pending zoning changes

Figure 3-2. Initial phases of development in Aerotech Business Park

(Source: Halifax Regional Municipality)

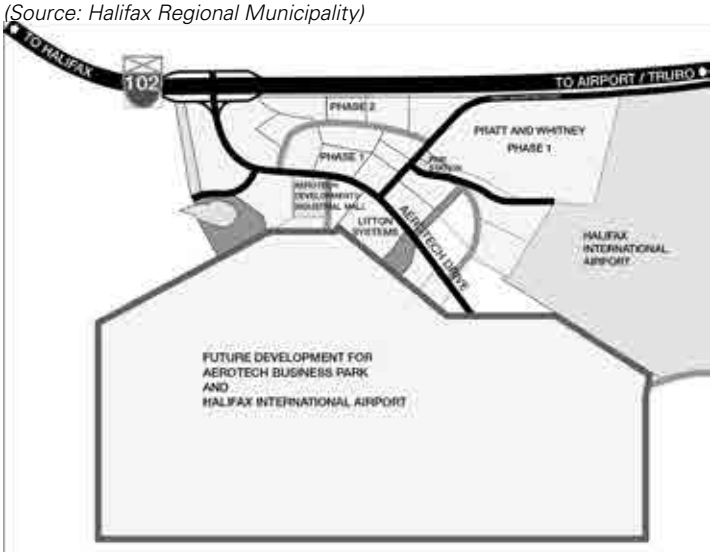
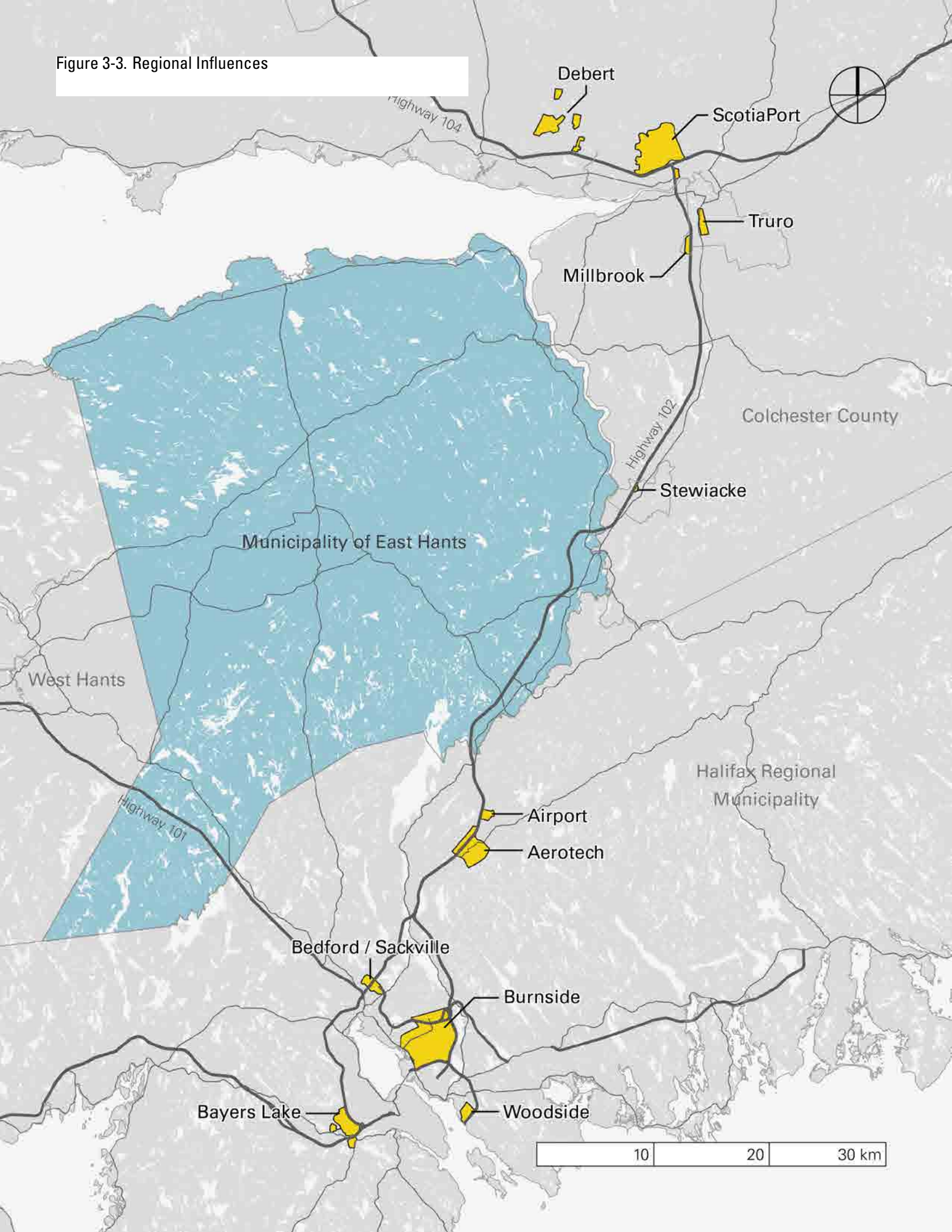


Figure 3-3. Regional Influences



According to HRM Staff, interest in the park has been consistently high, however the existing zoning precludes many proposed uses. Most of the park was zoned AE-1 "Aerotech Core" under the prevailing land-use by-law, which is a relatively restrictive designation permitting various aerospace/high-tech industrial and manufacturing uses; communications facilities; and educational and training centres. As such, many of the uses traditionally found in other Halifax-area business parks (such as Burnside) have traditionally not been permitted in Aerotech.

Most of the park's land remains under the ownership of the HRM. The only substantial developments to take place in the early 2000s were the openings of two airport hotels, the Hilton Garden Inn (2005) and Holiday Inn Express and Suites (2008). There is also a limited amount of development along Sky Boulevard on the western side of Highway 102. This land is zoned "AE-4 (Aerotech Business)", a designation that permits a wide variety of general business uses including retail stores, offices, restaurants, parking lots, hotels, and warehouses. At present, the street is home to an aviation museum, an airport hotel, a car racing track, and several expansive car lots. All of this land is privately owned.

The HRM's Industrial Employment Lands Strategy (IELS) recommended that the range of permitted industrial uses in Aerotech be expanded, within the AE-1 zone, by allowing warehousing, logistics, and distribution uses.

In 2021, HRM Staff began the process of expanding the range of permitted industrial uses in Aerotech, proposing to replace the existing zones with three new, more permissive zones: an Airport General Industrial zone allowing heavy and light industry as well as supporting commercial uses; Airport Commercial Industrial zone permitting light industrial and supportive commercial uses; and a Halifax International Airport zone catering to airport operations and associated manufacturing, construction and warehousing uses. This comprehensive rezoning process remains underway as of December 2025.

Airport property

The airport property itself shown in **Figure 3-4** constitutes a modest commercial node. The entire airport is zoned "AE-2 (General Airport)" which permits a wide variety of commercial uses including accommodation (such as hotels), retail stores, restaurants, service stations, and offices.

At present, the airport is home to a small number of food and beverage outlets independent of the airport terminal, including a Tim Hortons and a Subway restaurant associated with an on-site Irving gas station and convenience store. The airport terminal contains around 17 shops and 16 dining outlets (around half of them located beyond airport security). The airport property is also home to a 169-room hotel.

According to Halifax International Airport Authority's Master Plan 2021, further commercial development is planned for areas of the airport property that are 1) not suitable for aviation activity, and 2) closer to Highway 102. The intention is to increase HIAA's "non-aeronautical revenues" (i.e. commercial leases). This development is planned to take place on several (around four) undeveloped sites that currently exist within the loop formed by Bell Boulevard (in the vicinity of the Irving gas station), and in the longer term in the large area of forested land between Bell Boulevard and the highway.

The latter stage of development would enjoy excellent highway visibility and potentially exert a strong competitive influence with similar highway commercial-type development in East Hants. However, implementation of this plan would require significant upfront investment in roads and site formation, and would likely only take place after the existing vacant commercial sites have been developed, as dictated by commercial demand (and to an extent by the fortunes of the aviation sector). Lastly, development at the airport is also constrained by the existing water infrastructure capacity, which could further influence development timelines.

Figure 3-4. Airport master plan showing commercial development opportunities in green

(Source: Halifax International Airport Authority, 2025)

3.3 Halifax area

The HRM completed a comprehensive study of its industrial/business park areas in 2008 – the *Business Parks Functional Plan* – which was updated and superseded in 2020 by the *Industrial Employment Lands Strategy* (IELS).

The IELS noted that Halifax accommodated an average of 539,000 sf. of development in industrial parks each year between 2009 and 2018, absorbing 564 net acres (228 ha) of industrial land during that period, or 54 net acres (22 ha) per year. It noted that Halifax has "approximately 2,474 net acres (1001 net ha) of developable vacant industrial employment land [...] [including] 363 net acres (147 net ha) of shovel-ready industrial land including 220 net acres (89 net ha) within the Urban Service Area".

A range of public and private actors previously led industrial and commercial land development in Halifax County. The HRM has become, since it was established in 1996, the primary provider of new, non-residential serviced land in the form of business parks.

Halifax now has approximately nine (9) urban business parks developed by a range of entities:

- Municipal business parks (4) include Aerotech, Bayers Lake, Burnside (including City of Lakes and Dartmouth Crossing), and Ragged Lake
- Provincial and privately developed business parks (5) include Atlantic Acres, Bedford, Beechville, Sackville, and Woodside.

The IELS noted issues with limited market choice in the Halifax area:

- Limited supply of smaller development parcels – while medium-sized parcels (2 to 5 acres) were readily available, there were few small (< 2 acre) and large (10+ acres) sites available
- Lack of geographic diversity – Most available land was located in Burnside and Aerotech. The report commented: "there is a lack of urban supply of industrial lands in other geographic locations including Halifax, Bedford, and Sackville".

Since the report was published in 2020, some larger sites were made available in phase 13 of the Burnside Industrial Park in Dartmouth. Still, these apparent challenges for the Halifax and Dartmouth markets may represent opportunities when considering the positioning of future industrial development in East Hants.

Pending supply

The IELS found that the HRM needs at least 510 net acres of urban industrial lands to meet demand up to 2039, but existing plans only provided for lands sufficient to meet demand up to 2024.

Similarly, a report released by HRM's auditor general in December 2022 identified a lack of "sufficient long-term plans to meet expected future demand" for industrial lands, and was critical of the scarcity of details and timelines for the implementation of industrial park plans. Since then, HRM has initiated planning for future development of existing industrial parks including Burnside (Phase 14), Ragged Lake, and Aerotech business parks, described in more detail below.

HRM aims to supply at least 50-100 acres of industrial land per year. Whether the HRM can meet this goal on a long-term basis depends on the outcome of ongoing planning exercises. In any case, there is an opportunity for East Hants to allocate and plan for additional business park land that is competitive to HRM's offering with excellent highway accessibility along the Highway 101 and 102 corridors.

Figure 3-5. Woodside Industrial Park, Dartmouth

(Source: FBM, 2025)

Beechville Industrial Park

Lakeside Industrial Park was established in the community of Beechville in the 1960s by the former Halifax County Industrial Commission. Now called Beechville Industrial Park, the park is accessed from Highway 3 and was originally served by CN's now-defunct Chester Subdivision. Unlike in other Halifax-area industrial parks, the HRM retains no lot inventory in Beechville Industrial Park. All lots were sold off before the establishment of the HRM in 1996. Today, Beechville Industrial Park occupies around 115 acres. Major enterprises established there include Loblaw (grocery distribution centre), Coca-Cola, Nova Scotia Power, Russel Metals, and Sysco (food services).

Beechville Industrial Park	
Area	115 acres
Positioning	General industry, wholesale distributors
Businesses/tenants	27 (2020)
Management	Privately owned
Transportation	Highway 103 (indirect access), public transit
Expandability	Limited/none

Bayers Lake Business Park

In 1969, the former City of Halifax annexed neighbouring areas of the county including today's Clayton Park, Fairview, and Spryfield. This new land allowed the city to begin examining sites for possible large-scale industrial development to help meet anticipated demand. An early study carried out by CN identified the Bayers Lake area as the most optimal location for a new industrial park, however most of the site fell within the watershed area of Halifax's water supply and could not be developed.

The watershed area was phased out after the commissioning of a new water supply system in 1977, and Bayers Lake Business Park was subsequently developed in the mid 1980s.

The park was served by Highway 3 and the CN Rail Chester Subdivision. Originally developed at a cost of $43 million by the former Halifax Industrial Commission, Bayers Lake was originally intended to be an industrial park.

Access to the area was improved with the opening of Exit 2 of Highway 102 in December 1989, which connects to Bayers Lake's main artery, Chain Lake Drive. The industrial commission sold land below cost to United States retailer Price Club (now Costco), kick-starting an era of intensive retail development at the northern end of the business park in the early 1990s and attracting other warehouse-style retailers including Kent, Walmart, Future Shop, and K-Mart. Today, Bayers Lake is one of the Halifax area's major retail destinations. It also has a critical mass of industrial and office uses.

Bayers Lake Business Park	
Area	582 acres
Positioning	Business park with major retail hub
Businesses/tenants	335
Management	Halifax Regional Municipality
Transportation	Highway 102, Highway 103, public transit
Expandability	Limited

Figure 3-6. Retail development in Bayers Lake Business Park, 2025

(Source: FBM)

Rail service to both Beechville and Bayers Lake parks ended with the removal of the tracks around 2010. Ragged Lake Industrial Park was never served by rail.

Bayers Lake has limited expansion potential. A large proportion of the park's undeveloped area was purchased in 2013 by Banc Group and has since been developed for light industrial use. A community outpatient medical clinic was also built here.

Ragged Lake Business Park

Ragged Lake Industrial Park was developed in the 1980s by the Halifax Industrial Commission and originally targeted high-tech research and development industries. Initial concepts included a golf course, tennis courts, restaurants, and lounges. Today, Ragged Lake is home to around 13 enterprises employing around 575 workers. Early plans for a Silicon Valley-esque development failed to pan out; most of the business park remains undeveloped.

Very limited expansion of the park has taken place in recent years. In 2010, Halifax Transit opened a new bus garage and storage facility which was accompanied by the construction of a new transit access road. The transit centre was recently expanded to accommodate a fleet of battery-electric buses. Two new lots were also sold on Grassy Lake Drive, one now home to Oberland Agri-science and another still under construction.

Further development is constrained by servicing capacity. Access to Highway 103 would need to be improved. Expansion of Ragged Lake Business Park is contingent on the completion of background/environmental studies leading to a secondary planning process that will guide future industrial park expansion. An environmental systems study has been completed, while a watershed study is underway.

Figure 3-7. New multi-tenant industrial development in Bayers Lake Business Park, 2025

(Source: FBM)

Ragged Lake Business Park	
Area	60 developed acres (approx.)
Positioning	General business park
Businesses/tenants	11 (approx.)
Management	Halifax Regional Municipality
Transportation	Highway 103 (indirect access), public transit
Expandability	2,000-acre industrial reserve zone subject to further studies. Municipality expects to expand park within 10 years.

Bedford/Sackville business parks

This section describes the significant cluster of industrial and commercial development at Exit 4C of Highway 102, including the Sackville Business Park, Bedford Industrial Park, and Bedford Common business park.

Bedford Industrial Park was established by a private owner (Rocky Lake Quarry Limited) in 1972 at the intersection of Rocky Lake Drive and Duke Street, prior to the incorporation of the former Town of Bedford, and comprised 57.5 acres of occupied land by 1981, home to eight companies. It developed minimally beyond this due in part to the dominance of older, larger, government-supported industrial parks such as Burnside, coupled with comparatively poor road access. The Bedford Industrial Park was acquired by the province of Nova Scotia and much of the undeveloped land was used for the extension of Highway 107, which opened in December 2024. According to Halifax's 2008 *Business Parks Functional Plan*, the park has a gross area of 112.5 acres which is fully occupied. Expansion potential is limited by geographic constraints.

Sackville Industrial Park, located on the other side of Highway 102, was developed by Industrial Estates Limited, a provincial Crown corporation, with an initial investment of $2 million in 1981. It was developed with the large-scale, provincially led residential development of the Lower Sackville area. Initially, both the Bedford and Sackville industrial parks lacked direct highway access. A new connector road linking the two parks with Highway 102 (Exit 4C) opened in November 1997, greatly improving road access to the area. Sackville Industrial Park comprises around 232 acres and is marketed as a general business park. The park is relatively built out, with less than 50 acres undeveloped. Expansion is constrained by adjacent highways (Highways 101 and 102) and neither the Bedford nor Sackville parks have seen any significant new industrial supply in recent years.

Uniacke Business Park, favourably located along Highway 101, is a direct competitor to the Sackville and Bedford Business Parks. The HRM's *Industrial Employment Lands Strategy* notes a lack of new industrial land supply in Bedford and Sackville. As business park development in HRM is expected to be concentrated in Dartmouth, Aerotech, and Halifax, there is an opportunity for Mount Uniacke to potentially attract businesses seeking a location in the vicinity of Highway 101 within the commuter shed.

Bedford/Sackville business parks	
Area	232 acres (Sackville Industrial Park) 112.5 acres (Bedford Industrial Park) 260 acres (Bedford Common)
Positioning	General industrial park Retail park with future mixed-use element (Bedford Common)
Businesses/tenants	87 (estimated)
Management	Mixed (provincial, private)
Transportation	Highway 102, Highway 107, public transit, rail
Expandability	Approx. 41 acres (Sackville Industrial Park) 140 acres (Bedford Common)

Lastly, the area is home to the Bedford Common commercial area which was built by a private developer, Banc Group, which opened in 2007. Centred on Damascus Road, Bedford Common is a significant retail centre anchored by a Walmart Supercentre, Canadian Tire, and Winners/HomeSense. In addition to smaller-format retail and quick-service restaurants, the site hosts several non-retail commercial and community uses including office space and an Army Cadets facility. Bedford Common has around 123 acres of undeveloped land that was originally zoned for light industrial use. Since 2012, Banc Group has sought to have the land rezoned for mixed-use development and has produced a variety of design concepts, the latest being a relatively high-density, residential-led scheme with 6,216 dwelling units.

Given limited expansion capacity in the Bedford and Sackville industrial parks, and the residential nature of current plans for the remaining undeveloped lands at Bedford Common, there is limited opportunity for the Bedford/Sackville commercial-industrial node to attract new growth compared to other areas in the Halifax region such as Burnside and Aerotech.

The 2024 opening of the Highway 107 Sackville-Burnside-Dartmouth connector and new Exit 4C combined with unconfirmed reports of a new Costco suggests this area will face development interest for commercial and light industrial development though the issues of creating developable land remain challenging, thereby opening the door for East Hants to capture spillover demand.

Burnside Industrial Park (Dartmouth)

According to the HRM, Burnside (including the City of Lakes Business Park) employs around 30,000 people at approximately 2,000 different enterprises, and has an annual Gross Domestic Product of more than $2.5 billion.

Occupying around 3,400 acres (gross), Burnside is the largest industrial park east of Montreal. Burnside contains several specialized sub-districts positioned as follows:

- Atlantic Gateway Halifax Logistics Park – a transportation distribution complex
- City of Lakes Business Park – a high-grade commercial office park
- Dartmouth Crossing – a privately developed retail centre

Burnside Industrial Park's development started as a private development in 1961 by Commodore Commercial Estates, followed by publicly led development on an adjacent site later in the decade. Burnside benefited from the opening of new transport links in 1970/71 including the Mackay Bridge, Highway 118, and an extension of Highway 111. By the early 1980s, Burnside was home to 450 companies.

Direct access to highways 107 and 118 was added in the early 1990s, and the opening in December 2024 of the Highway 107 extension has further improved connectivity between Burnside, Highway 102, and the Bedford/Sackville industrial cluster. Burnside is well served by public transit and Halifax Transit intends to build a new bus terminal in the Wrights Cove area in the near future. The industrial park is located along CN Rail's Dartmouth Subdivision and is served by three industrial spur lines.

The HRM is currently undertaking the development of Phase 13 of Burnside Business Park, which is being completed in three phases: 13-1, 13-2, and 13-3. Phase 13-1, where lots are currently being sold, comprises 120 net acres of prepared and serviced industrial sites located just off two directional interchanges on an extension of Highway 107 that opened in December 2024.

The Burnside Phase 14 lands were acquired by HRM in 2015 and represent 427 gross hectares which will be designated for industrial use. Located adjacent to Phase 13, these lands are well located with direct access to Highway 107. Topographical and hydrological considerations (including substantial wetlands) will limit the net developable area. In addition, the terrain in the Burnside area makes formation of large (20+ acre) sites challenging.

Burnside Industrial Park	
Area	3,400 acres (including internal precincts such as Dartmouth Crossing)
Positioning	General industrial park with specialized precincts (logistics park, prestige office, retail)
Businesses/tenants	Approx. 2,000
Management	Halifax Regional Municipality
Transportation	Highway 102, Highway 107, Highway 111, public transit, rail
Expandability	200 net acres (two remaining sub-phases of Burnside Phase 13) 427 additional gross acres (Burnside Phase 14)

Figure 3-8. New multi-tenant building in Burnside Industrial Park

(Source: FBM)

Atlantic Gateway Halifax Logistics Park

The Halifax Logistics Park was developed as part of the "Atlantic Gateway" initiative, part of federal government efforts in the early 2000s to capture more of the international container trade by enhancing transportation infrastructure across the country. While Canada's infrastructure on the west coast was well developed, strategic improvements were required to capture the benefits of international trade in Atlantic Canada. The Atlantic Gateway initiative was supported by the Atlantic Canada Opportunities Agency.

In 2007, HRM released a report outlining the Halifax area's envisaged role in the Atlantic Gateway strategy. It recommended various infrastructure improvements including the development of a distri-park/transload sector. This was to be implemented by HRM by rebranding Burnside Phrase 12 as the Halifax Logistics Park, building off the presence of two major logistics companies, Consolidated Fastfrate (which was already in operation) and Armour Transportation.

The Halifax Logistics Park is located in a newer area of Burnside with direct access to highways 107 and 118 and roads designed to accommodate long combination vehicles (i.e. trucks hauling multiple trailers).

The newest addition to the Halifax Logistics Park is a Midland Transport facility that opened in December 2024. The 78,820 sf facility contains warehousing space, offices, and is the company's largest trucking terminal in Atlantic Canada. The logistics park proper has limited expansion potential as it is nearly completely built out, but space is available in Burnside phases 13 (and later 14) to the north.

City of Lakes Business Park

The City of Lakes Business Park was created in 1983, shortly following the opening of Burnside Drive, and is positioned as a "prestige office park" with excellent highway visibility. The business park comprises around 350 acres bounded by Highway 111, Burnside Drive, Wright Avenue, and the Dartmouth Crossing lands to the east.

The area is today home to suburban office space in a variety of low and mid-rise buildings, three hotels, a school, a regional recreation complex, and various public agencies including the RCMP's Nova Scotia headquarters, the Nova Scotia Medical Examiner Service, and the local school board. Unlike many other parts of Burnside, nearly all streets in City of Lakes Business Park have sidewalks and trail systems have been constructed in the lands surrounding Frenchman and Spectacle lakes.

The City of Lakes Business Park is approaching full build-out as the undeveloped lands that remain (primarily in the vicinity of John Savage Avenue) are constrained by watercourse buffer areas as well as a Nova Scotia Power transmission line right of way.

City of Lakes Business Park	
Area	350 acres (approx.)
Positioning	Prestige office park
Businesses/tenants	Approx. 211
Management	Halifax Regional Municipality
Transportation	Burnside Drive, Highway 111, public transit
Expandability	Limited, perhaps 15 acres

Dartmouth Crossing

Dartmouth Crossing is a large-scale, primarily commercial (retail) development located next to Highway 118 on the eastern side of Burnside Industrial Park. It was developed privately by North American Development Group (NADG) on a 511-acre site formerly home to two quarries, an asphalt plant, and a waste management facility. NADG purchased the site in 2004 and began work on the first phase of development, which primarily consisted of over 200 acres of retail development supported by new highway interchanges.

Dartmouth Crossing initially had around 95 retail stores and restaurants, two hotels, 10 service uses, and an office component. Over 85% of the retail opened within 2007. The retail park gradually expanded in the 2010s. Notable openings in this period included IKEA, which opened in late 2017, and Kent building supplies, which relocated from Mic Mac Mall in 2018.

The retail park includes small-format retail stores, which are concentrated in a lifestyle centre format surrounding a park; mid-sized plaza-style stores; and large-format regional stores including Walmart, Costco, and Home Depot.

Today, Dartmouth Crossing is one of the Maritimes' largest shopping nodes, with around 1.8 million sf of retail space, around 150,000 sf of office space, and three hotels. The development's first residential project is currently underway, providing 284 apartments in two high-rise towers. Around 150 acres is set aside for further retail and high-density residential use, with a total of around 2,500 residential units planned.

Dartmouth Crossing	
Area	551 acres
Positioning	Regional retail park, mixed use
Businesses/tenants	Approx. 120
Management	Private
Transportation	Highway 111, Highway 107, Highway 118 (direct access), Halifax Transit
Expandability	Around 150 acres for residential and retail use (privately owned)

Figure 3-9. Highway 118 and Hampton Inn & Suites at Dartmouth Crossing

(Source: FBM)

Woodside Industrial Park (Dartmouth)

Woodside Industrial Park (also known as Woodside Ocean Industrial Park) is one of the older industrial parks in the Halifax region, having been established by Industrial Estates Limited, a former provincial Crown corporation, in the 1960s. In the 1980s, the park was positioned as a service base for the growing oil and gas sector. The Mount Hope Avenue interchange, Exit 8 of Highway 111, opened in 2006 and significantly improved highway access to the park. In the 2000s, the province promoted a newly developing section of the park as a home for the biosciences sector.

The IELS notes that Woodside is approaching full build-out, but that there is significant zoned industrial land in the nearby Eastern Passage area.

Woodside Industrial Park	
Area	290 acres (approx.)
Positioning	Light industrial, ocean industry, technology
Businesses/tenants	Approx. 118
Management	Provincial
Transportation	Highway 111, public transit
Expandability	Limited

Truro area

The Truro area, and Colchester County as a whole, has been nicknamed "the Hub of Nova Scotia" for its location near the centre of the province at the crossroads of major highways and rail lines. This aided in Truro's development as a centre for manufacturing and logistics. These industries were originally located near the town's downtown area. The 2021 Canadian census recorded a population of 13,875 in Truro (including Millbrook First Nation) and a population of 46,157 in the Truro census agglomeration.

There is no public transit in Truro at present, but a potential future bus service is being studied under a Regional Transit Study carried out jointly by Colchester County and the Town of Truro. The routes under consideration would serve Truro's major industrial and business centres including downtown, the Truro Power Centre, and Truro Industrial Park. A peak-hour-only service to Debert is also under consideration.

Truro Power Centre

The Truro Power Centre, also known as Millbrook Power Centre, is located at Exit 13 of Highway 102 (refer to **Figure 3-10**). Owned and administered by the Millbrook First Nation, a Mi'kmaw community, the Truro Power Centre offers around 80 acres of leaseable commercial land with good highway visibility. The band government's economic development strategy aims to create revenue for the community, support First Nation businesses and entrepreneurship, and generally create economic opportunities for band members.

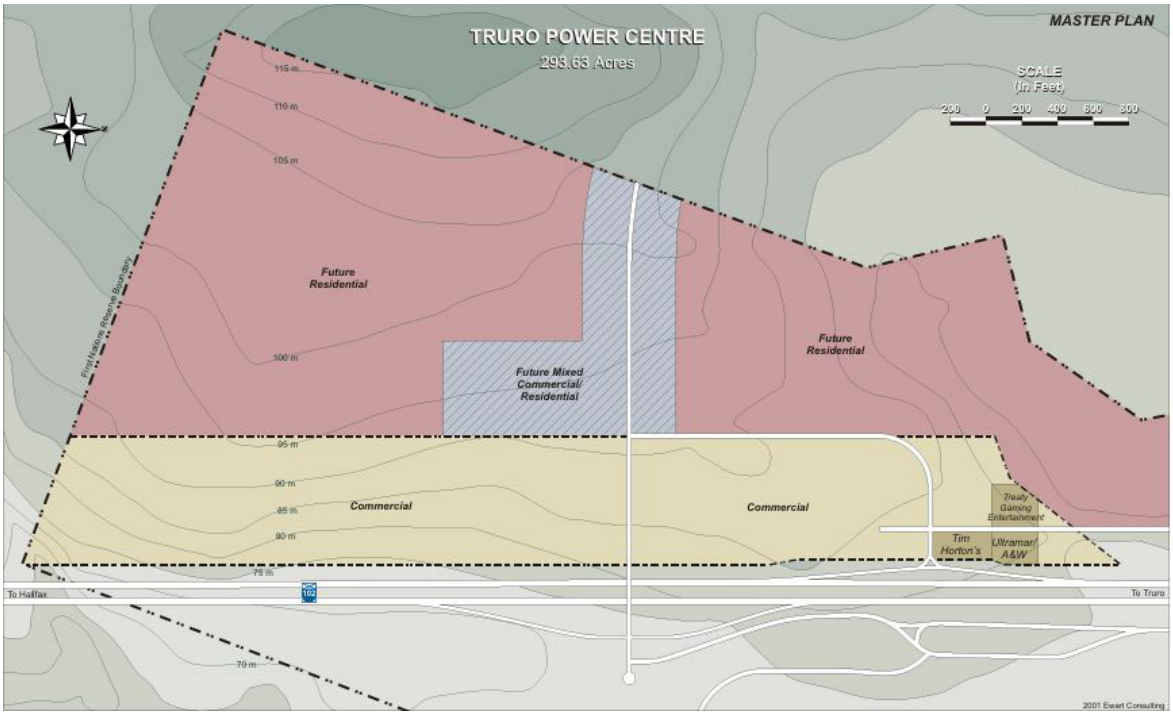
Although the power centre is located in the Town of Truro, the First Nation lands are not regulated by the town. Millbrook advertises that tenants of the power centre are "free of municipal planning controls and restrictions on hours of operation".

Development of the power centre has been accompanied by residential construction set further away from Highway 102.

Since development began around the turn of the millennium, Truro Power Centre has developed into a significant economic centre home to highway commercial development, hotels, cultural and community buildings, light industry, and a gaming/convention centre. There remains around 52 acres of serviced commercial land available for long-term lease.

Figure 3-10. Truro Power Centre plan showing land set aside for commercial development (yellow).

(Source: Province of Nova Scotia)



Truro Industrial Park	
Area	195 acres
Positioning	General industrial park with established manufacturing presence
Businesses/tenants	76
Management	Truro Industrial Development Society
Transportation	Highway 102 (indirect access), potential future public transit, rail
Expandability	Approx. 500 acres

Debert Industrial Park	
Area	Approx. 550 acres
Positioning	Light industrial park, warehousing and distribution
Businesses/tenants	50 (approx.)
Management	Municipality of Colchester
Transportation	Highway 104, potential future public transit, rail
Expandability	Approx. 182 acres of serviced land for sale

Hub Centre Drive	
Area	Approx. 85 acres
Positioning	Small light industrial park
Businesses/tenants	11 (approx.)
Management	Privately developed. County-owned roads.
Transportation	Highway 102 (direct southbound access only)
Expandability	Limited, nearly built out

Figure 3-11. Truro Industrial Park

(Source: Town of Truro)

Truro Industrial Park

In 1962, the Truro Industrial Park was established in the southern part of the town. Now called the Truro Business Park and managed by the Truro Industrial Development Society, the precinct is now the largest industrial area in the county, home to nearly 80 businesses engaged in sectors such as manufacturing, warehousing, processing, and agricultural supply.

The industrial park is relatively diversified and, as Truro's municipal planning strategy notes, has seen a shift away from larger dominant employers to a variety of smaller, locally owned businesses.

The expandability of the industrial park is somewhat limited by the surrounding land uses and the park lacks direct access and exposure to the highway. Some attempts at expansion took place on Young Street, however it was determined that the commercial viability of these efforts were limited, and that future expansion would take place southwards in the form of an extension of Industrial Avenue. A future interchange along Highway 102 in Hilden, coupled with an extension of Industrial Avenue, has been proposed. However, there are no concrete plans to pursue the project at this time.

There are other, smaller pockets of industrial activity elsewhere in Truro, including the Stanfield's clothing factory. The town is also a regional centre for shopping and public services such as health care and post-secondary education.

Debert Industrial Park

Another industrial node in the vicinity of the ScotiaPort site is the Debert Business Park, located at the former Canadian Forces Station Debert in the farming area of Debert, Nova Scotia, around 15 km northwest of Truro.

Operated by the Municipality of Colchester, the industrial park takes the form of several discrete areas of serviced and developed lands, in the general vicinity of the former air base, along Plains Road, which connects to the Trans-Canada Highway. The Canadian National Railway passes through the area, but the only rail spur serving the industrial lands appears to be abandoned. The former military airport is now the civilian Debert Airport.

The military gradually shut down operations at Debert in phases, from the 1970s to the 1990s, and the area was transformed into an industrial park due to its advantageous transportation connections, namely its proximity to the Trans-Canada, the railway main line, and the airport.

The Canadian Forces station closed in 1996, and by the early 2000s, around 1,000 people were employed at the industrial park.

Today, the area is a centre for industry and aviation. The airport is home to the Debert Aviation Centre, the Truro Flying Club, and the Department of National Defence's Air Cadets flying program. Major business tenants include Sobeys and Home Hardware, which operate distribution centres, the Debert Hospitality Centre, and TDL Group (Tim Hortons).

The Municipality is actively marketing several industrial and commercial sites in the area, all in the vicinity of Ventura Drive. These range in size from 1 to 7.82 acres and are fully serviced with municipal road access, water, and sewer.

There is no public transit at present, but a peak-hour "rural shuttle service" between Truro and Debert is under consideration as part of the Regional Transit Study.

Hub Centre Drive

This is a privately owned business park on Hub Centre Drive located at Exit 14A of Highway 102 in Upper Onslow, near the Town of Truro, just off Onslow Road. The property has experienced strong growth in recent years and is considered a direct competitor to Truro Industrial Park. The park is approximately 47 acres in size and home to around 11 enterprises.

All lots are zoned C-2 Highway Commercial, which permits a variety of commercial, service, civic, and light industrial uses. Under the existing zoning, expansion prospects for this business park are limited as the surrounding area is zoned for residential or environmental protection purposes.

Hub Centre Drive is not serviced by rail. Road access is somewhat indirect from locations west or north of Truro (e.g. New Brunswick) since Exit 14A is an incomplete highway interchange that provides access only to areas south. Public transit may be provided in the future under one of the two routing options proposed by the Regional Transportation Study. The other option does not service the Onslow Road area.

Scotiaport (proposed)

ScotiaPort is a proposed industrial development in Onslow, just north of Truro, adjacent to the strategic intersection of Highways 104 and 102. The project is led by a partnership between Endurance Equities of Edmonton and the Millbrook First Nation, which is located next to Truro.

Like the Debert Industrial Park, the project takes advantage of the area's advantageous location and transportation infrastructure. An inland rail terminal is planned to be built adjacent to the existing CN rail line, while direct road access would be provided to the two highways.

The conceptual master plan for ScotiaPort calls for highway access through a new interchange on Highway 104 at Crowes Mills Road, which is currently a simple overpass, as well as a redesign of the existing T-shaped intersection of highways 102 and 104 in order to provide an additional, direct access to the ScotiaPort site.

One of the main elements of the ScotiaPort development is a new, $100-million inland shipping terminal to be developed on approximately 218 acres surrounding the CN rail line. The site offers over 2.5 km (8,200 ft) of frontage along the railway. The facility is being developed in partnership with the Canadian Rail Equipment Works and Services (CREWS) company, which operates similar rail yards elsewhere in North America. CN has certified ScotiaPort a "rail-ready site" suitable for rail-centric industries.

The conceptual site plan for ScotiaPort covers an area of more than 3,000 acres and lays out major roads and highway accesses, rail facilities, and tentative land use designations. A large solar power plant is envisaged for nearly 1/3 of the site, north of the rail line.

The lands adjacent to the inland rail terminal are envisaged to be developed as a manufacturing and logistics park, taking advantage of highway connections and proximity to the rail yard.

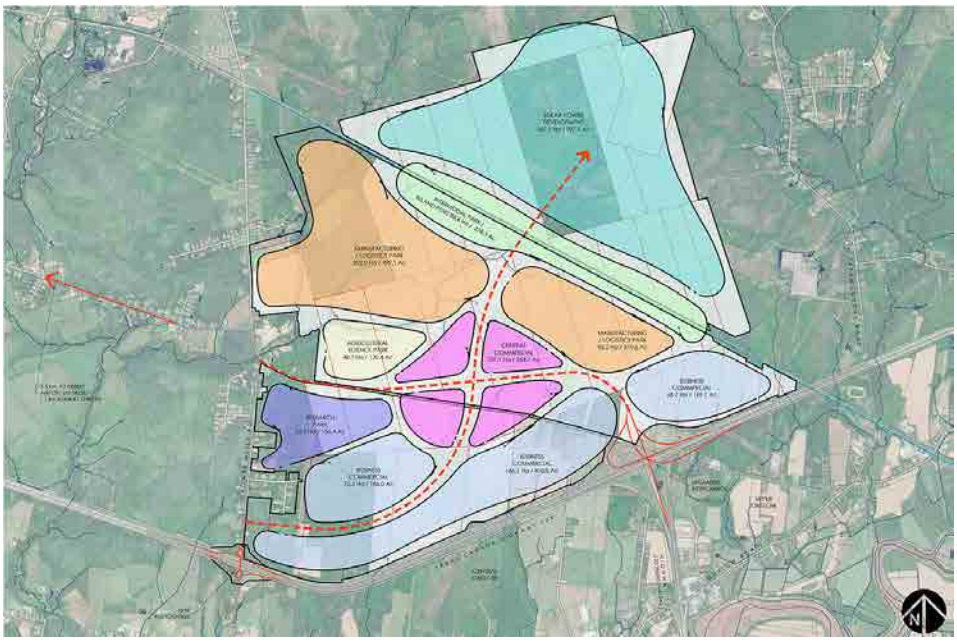


Figure 3-12. Conceptuallayoutplanfor ScotiaPort, located at the intersection of highways 102 and 104.

(Source: Endurance Equities, Millbrook First Nation)

Figure 3-13. Rendering of proposed intermodal terminal at ScotiaPort

(Source: Millbrook First Nation, CREWS)

3.4 Conclusion

Regionally influential commercial and industrial nodes are concentrated in the Halifax, Bedford and Dartmouth areas to the south, and Truro/Colchester to the north. By examining trends in these areas we can identify possible opportunities and challenges for East Hants.

Both the Halifax and Truro areas have experienced challenges providing a supply of industrial land that fully meets market needs. Halifax municipal staff consider that the Halifax region misses out on economic development opportunities due to an undersupply of industrial employment lands and a lack of certain lot sizes. The topography of the Burnside area makes assembling large lots (e.g. 50 acres and above) difficult, especially due to the manner in which business park expansion is carried out without specific purchasers arranged ahead of time. There could, therefore, be opportunity for East Hants to capture development that fails to find appropriately sized sites in the Halifax area, yet still falls within a comfortable commuter shed for workforce attraction and retention.

The Truro Industrial Park possesses ample land for expansion, but poor highway access compared to East Hants' industrial parks.

It appears that marketing of vacant land in the long-dormant Aerotech Business Park may take place in the medium term together with the introduction of a far more permissive zoning regime and the recent opening of the Aerotech connector to Fall River.

Given the park's direct access to Highway 102 and proximity to East Hants, Aerotech will continue to be a direct competitor to further development in Elmsdale, however the Aerotech connector also benefits accessibility to workforce for areas like Elmsdale and Lantz as the Fall River community is not more conveniently accessible.

ScotiaPort in Colchester County is an ambitious proposal rivaling Burnside in scale. However, implementation details and timelines are unknown at this time, though a Request For Proposals was recently issued (May 2026) seeking developer partners for the project. It is noted that ample land remains available in the adjacent Debert Industrial Park.

Figure 3-14. Highway 102 in Truro

(Source: FBM)

Section 4: Trends and Best Practices

4.0 Trends and Best Practices

4.1 Introduction

Over the past decade, East Hants has emerged as a primary destination for both residential and non-residential investment. East Hants serves as a critical link between the HRM and Truro/Colchester, as well as Windsor/West Hants, effectively anchoring the province's two most heavily-traveled and significant transportation corridors along Highway 101 and Highway 102.

This section documents industrial and commercial trends shaping East Hants and the wider region it serves, with a focus on best practices in land development pertaining to targeted investment sectors. By leveraging its strategic location near the Halifax International Airport and the Port of Halifax, as well as valuable agricultural areas in the Annapolis Valley and Truro/Colchester, not to mention the high value agricultural land in Milford, East Hants can continue its transition from rural-residential into a progressive industrial, agricultural and commercial hub. The following content examines the driving economic considerations and best practices that are most developable and profitable in the current economic climate, providing a roadmap for site selectors, investors, tenants and developers.

4.2 Canadian Real Estate Market

Understanding the non-residential market in East Hants requires an examination of the underlying economic indicators that support long term investment for commercial and industrial activity.

Across Canada, the retail market has seen steady growth after fluctuating trends during and post pandemic. A Coldwell Banker Richard Ellis (CBRE) Outlook Report[1] described the current Canadian retail market as "supply-constrained", with low vacancy rates and increase in rents.

Current challenges in Canadian retail market include potential recession and reduced target for immigrants, which can pose impact on maintaining retail revenue and retaining required labour force population. The report highlighted that the entertainment and beauty sectors are becoming more successful in Canada, as consumers had begun to see these sectors as more of "essential" categories like other necessity-based retail.

CBRE's Industrial Figures Report (Q3 2025) highlighted a general increase in availability rates and negative net absorption. Both trends are also evident in the industrial market in Halifax.

While the industrial market in Halifax has been generally steady in Q3 2025, average asking rental rates have been increasing in the past few years.[2]

4.3 U.S. Relations

An ongoing consideration is how geopolitical trade negotiations with the United States are going to affect the Canadian economy. The industries expected to be most affected are oil and gas, potash production, farmers and farming equipment, and the steel and aluminum industries.[3] Ripple effects like higher prices resulting from tariffs can also affect Canadian retail market.[4]

Uncertainty created by ever-changing tariff threats are also leading to a decrease in hiring and consumer spending, both of which are likely to affect retail and industrial markets in Canada. During the first quarter of 2025, employment across Canada in wholesale and retail trade declined by 1% (a loss of ~29,000 jobs).[5] However, the change in employment in this category year-over-year was minimal, and there were increases in employment in personal and repair services (both of which are retail merchandise categories).

One emerging retail impact in response to tariffs is a renewed directive and desire to purchase more local products. A heightened local focus aligns well with East Hants' local business communities and current composition.

Stability provided by the United States-Mexico-Canada Agreement (USMCA), particularly as it undergoes a 2026 joint review, serves as a catalyst for potential industrial expansion within East Hants. As global supply chains shift towards greater regional resilience (e.g. food security and mass timber construction), East Hants is strategically positioned to capture overflow from the Halifax gateway, offering affordable industrial lands, with supportive approval processes, capable of facilitating alternative multi-modal access to the U.S. Eastern seaboard.

4.4 Retail Trends and Typologies

1 CBRE. (2025). *Canada Real Estate Market Outlook.*

2 CBRE (2025). *Canada Industrial Figures Q3 2025.*

3 Bank of Canada. (2025). *Tariffs and trade uncertainty are hurting the Canadian economy.*

4 Bank of Canada. (2025). *Tariffs and trade uncertainty are hurting the Canadian economy.*

5 Statistics Canada. (March 2025). *Labour Force Survey.*

Single-use commercial has been the most popular format of retail development over the past several decades in many Canadian cities and towns, especially where land is plentiful. These include stand-alone stores, power centres, and retail strip malls. While these development formats continue to be the format of choice for developers, there have been shifts in how retail development is perceived from consumer, tenant, and municipal perspectives.

Recent studies and data from organizations such as Urban Land Institute (ULI), Urban Development Institute (UDI), and ICSC (International Council of Shopping Centers) suggest retail trends are shifting in response to a variety of factors including economic, demographic, geographic, and lifestyle.

Modern retail development is moving away from the isolated shopping experience and toward the "community hub" model. These hubs are designed as mixed-use environments that combine retail, food and beverage, services, office space, entertainment, and recreation. The goal is to create local destinations that serve multiple needs, reducing the reliance on private vehicles and fostering a sense of place.

Three prominent factors driving this shift include:

1. Walkability and Lifestyle: Consumers increasingly prefer communities where they can walk or cycle to services. This is particularly relevant in urban locations, but it also showing growth and acceptance in suburban communities like Lantz and Elmsdale where new, gently denser residential developments are being planned to include active transportation and transit access.
2. Supply Chain Efficiencies: Higher efficiencies in logistics are allowing retail tenants to downsize their physical footprints, focusing on "right-sized" spaces that serve as showrooms or pick-up points for e-commerce.
3. The Evolution of E-commerce: As online shopping continues to grow, accounting for over $50 billion in annual retail sales in Canada, brick-and-mortar stores must offer experiences that cannot be replicated digitally.

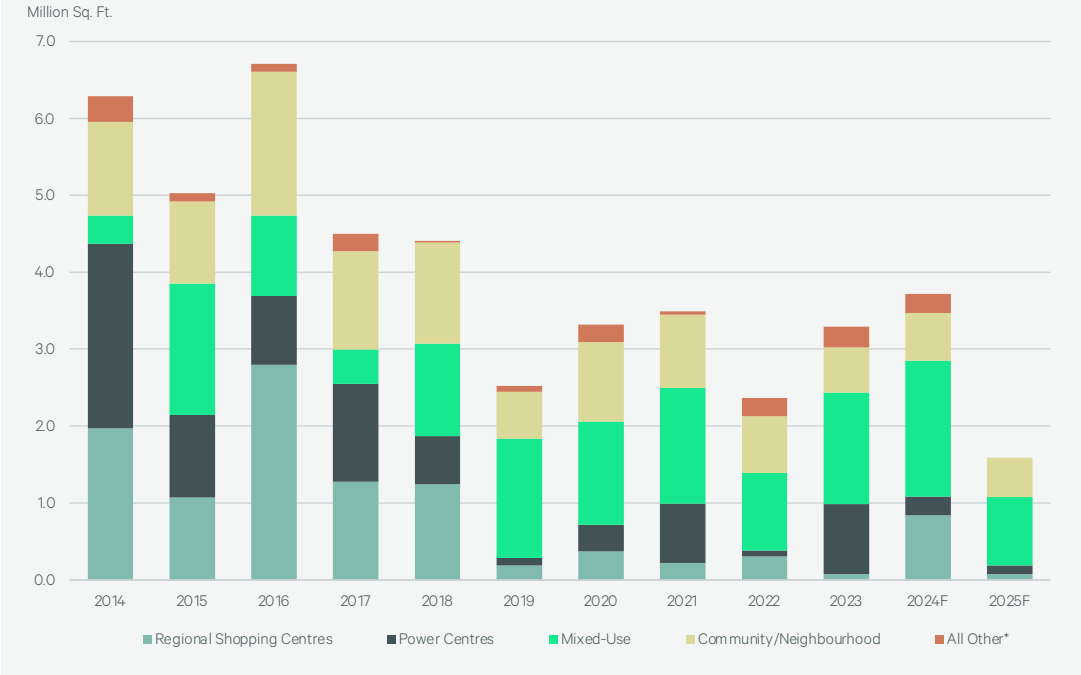
As a consequence of these trends, as well as general labour and economic outlooks, retail development may not be as prolific as in the past, where enclosed malls were commonplace, and will likely take a different form. However, grocery-anchored community scale shopping centres averaging 100,000 sf in size will still be attractive.

Commercial developments that are "right-sized" and act as local community hubs, with a mix of uses including retail, food and beverage, services, office, entertainment and recreation will become sought after by consumers and therefore developable and profitable. This trend is considered to be a logical direction for East Hants as it plans for its future growth.

Figure 3-1 illustrates the total square footage of new retail supply across Canada. While the total new supply is in decline, this figure shows that mixed-use format (indicated in green), including smaller-format retail stores, represents the majority of the new supply in Canadian retail market in recent years.

Figure 4-1. Canada Retail New Supply by Format, 2014-2025F

(Source: CBRE, Q3 2024)



4.5 Industrial Trends and Opportunities

The industrial sector in East Hants has emerged to become prominent regionally and is healthy and stable. It too is rapidly evolving to capitalize on East Hants' proximity to the HIA and HRM. This proximity has made the Enfield, Elmsdale, and Lantz corridor a primary target for high-value industrial sectors that require rapid market access. Similarly, Mount Uniacke also benefits from proximity and accessibility between the HRM and Windsor/West Hants commuter shed.

Aerospace, Defence, and High-Tech Manufacturing

Enfield is the anchor for one of the region's most significant industrial clusters focused on Aerospace and Defence. Though not specifically in East Hants, firms like IMP Aerospace & Defence, headquartered at the HIA and the Aerotech Business Park, utilize massive campuses comprising hundreds of thousands of sf for military and civilian aircraft sustainment, manufacturing, and technical services. This cluster attracts highly skilled professionals and supports a diverse supply chain in advanced manufacturing, including avionics, electronics, and precision machining. East Hants is a major contributor to the aerospace workforce and is equally well-positioned to leverage its proximity for supportive industries, considering that IMP has an off-site facility in Upper Tantallon. With increased federal investment in arctic and coastal sovereignty, this sector is expected to provide strong growth over the next decade.

Cold Chain and Perishables Logistics

With Nova Scotia's seafood export industry generating significant revenue, there is a critical and growing demand for specialized logistics. East Hants' proximity to the airport could be leveraged to support the cold chain requirements of seafood and other perishables beyond that which exists airside at the airport. Facilities in this sector utilize cutting-edge infrastructure, including 24/7 refrigerated storage and specialized handling procedures, to ensure products reach global markets in prime condition. As cold storage capacity in the region reaches near-peak occupancy, there is a significant opportunity for new development in climate-controlled warehousing in areas like Elmsdale or Enfield.

Small Bay and Flex Industrial Formats

A significant trend in the Nova Scotia industrial market is the rising demand for small bay or "flex" industrial spaces. These units typically range from 1,000 to 5,000 sf and cater to a wide variety of users, including HVAC contractors, light manufacturers, and service companies.

As rents in the Halifax core (such as Burnside or Bayers Lake) increase to record levels, many of these businesses are looking to communities like Enfield, Elmsdale, Lantz, Mount Uniacke or Milford for more affordable options.

Mass Timber & Forestry

The highly anticipated opening of Nova Scotia's first mass timber production facility in the Elmsdale Business Park is expected to have a transformational impact on supportive, value added forestry and construction industries in East Hants and the region. This $215 million project establishes a vertically integrated supply chain that keeps jobs, innovation, and value-added manufacturing within the province.

The facility will revolutionize the local forest economy by creating a high-value market for undervalued resources and will support a circular economy by utilizing wood residues from forest harvesting, sawmilling, and thinning operations. This provides a critical market for low-grade wood, which has been in decline since the closure of major pulp mills in the province. The facility will also anchor and stimulate a growing off-site construction cluster. Prefabricating large-scale components in controlled environments reduces on-site labour requirements and minimizes material waste.

Beyond the most evident product benefits, the facility will trigger growth in specialized downstream businesses that will wish to gravitate within and around the Municipality of East Hants. These downstream industries will include professional services, logistics and trucking and education and training.

Agri-Business & Ag-Tech

As East Hants transitions from its rural roots and a more balanced suburban future, not to mention the increasing role of food security in a new global trading economy, processing and manufacturing of agricultural products will become a vital industrial sector.

Agriculture is a major contributor to provincial economy and East Hants is increasingly leveraging its important agricultural land, particularly in the Milford area, for high-intensity food production.

The Milford area offers prime agricultural land that should increasingly be targeted and sought after for industrial-scale greenhouses.

Larger, high-tech industrial greenhouses in Milford could represent a significant advancement in regional agriculture by merging environmental stewardship with economic stability. Through the implementation of closed-loop irrigation and soilless substrates, these facilities could minimize water waste and eliminate the risk of soil-borne bacterias. This controlled setting enables the economical production of a diverse range of crops such as tomatoes, peppers, cucumbers, and strawberries. Strategically anchored near the Highway 102 transportation corridor, a cluster of industrial greenhouses could strengthen regional food security and provide consistent, year-round employment, shifting the local agricultural sector away from its traditionally seasonal nature.

Eco-Industrial Parks & Sustainability

An Eco-Industrial Park (EIP) is a community of businesses located on a common property that seek enhanced environmental, economic, and social performance through collaborative resource management. This approach emphasizes collaboration over competition, turning environmental challenges into business opportunities.

At the heart of a successful EIP is where the waste or byproducts of one business become the feedstock or energy source for another.

In Nova Scotia, the Burnside Business Park has successfully implemented EIP principles with the support of Dalhousie University's Eco-Efficiency Centre; East Hants may wish to dovetail onto this initiative. Over 1,500 businesses have worked to improve their environmental performance through profitable partnerships.

The integration of eco-industrial activities in East Hants represents a forward-thinking approach to regional development that aligns with the municipality's 2026 strategic goals for sustainable growth.

By incorporating green infrastructure such as rain gardens, permeable pavements, and bioswales, industrial sites can manage stormwater runoff on-site, directly supporting East Hants' aspirations for advanced wastewater and water management strategies.

This environmental stewardship is complemented by energy redistribution systems, which recover waste heat from industrial processes to provide low-cost heating for adjacent buildings or greenhouses, significantly boosting energy efficiency.

Furthermore, by fostering shared services, businesses could potentially collaborate on shipping and receiving facilities, parking, and green technology, reducing individual overhead while creating a more resilient, interconnected, and resource-efficient industrial ecosystem.

4.6 Summary Implications

The Highway 101 Corridor: Mount Uniacke

Mount Uniacke is the gateway to the Annapolis Valley and Windsor/West Hants and is increasingly being integrated into the HRM commuter shed. The Uniacke Business Park is the centrepiece of this corridor, offering over 250 acres of commercial and light industrial land. Proximity to Halifax and the presence of high-speed fibre infrastructure make this area attractive for technology companies. The selection of the park for the Atlas Structural Systems plant highlights its viability and visibility for high-productivity manufacturing.

The Highway 102 Corridor: Elmsdale, Enfield, Lantz and Milford

The Highway 102 corridor is the backbone of the province's logistics and distribution network. This area is seeing significant population growth and residential densification, particularly in Elmsdale and Lantz.

Key areas of focus include:

- **Elmsdale Business Park**: This business park is East Hants' primary hub for serviced industrial and commercial activity. Its proximity to the airport makes it an ideal location for freight related businesses and large-scale manufacturing expansion and diversification, as will be evident with the soon-to-open mass timber plant.
- **Milford Industrial Park**: Offering high visibility and large lot sizes, this privately owned park serves heavy industrial users and the transportation sector, though its proximity to the heart of agricultural activities presents a major opportunity to capture missed food security opportunities.
- **Lantz Exit 8A Interchange:** The area west of Highway 102 in Lantz is being planned for future residential, commercial and light industrial business park uses and will become a major employment, civic and economic centre.

Section 5: Demographic Profile

5.0 Demographic Profile

5.1 Introduction

This section presents a summary of the local economic and market-driven dynamics in East Hants and includes a demographic profile, population forecasts, housing demand forecast, and commercial retail demand forecast. This information has been used to provide inputs to support the development of the Non-Residential Market Analysis.

5.2 Demographic Summary

The most recent Statistics Canada Census release (2021), as well as Manifold Data Mining Inc (2025), a leading supplier of demographic information, were used to tabulate demographic estimates for East Hants. Manifold data provides current estimates between census years.

Table 5-1 shows the summary of the demographic profile, including total population, age distribution, educational attainment, household income, and mobility status.

Population Overview

The population for East Hants is estimated at 26,370 for 2025. From 2016 to 2021 annual population estimates indicate that East Hants experienced an average annual growth rate of 1.2%, a rate which has increased to 2.6% per year on average between 2021-2025.

Age: East Hants has a relatively younger population compared to the provincial average with a slightly lower proportion of people aged 65 and over (**Figure 5-1**). East Hants has a slightly higher percentage of population aged between 0-14 and 45-54, suggesting a higher proportion of families.

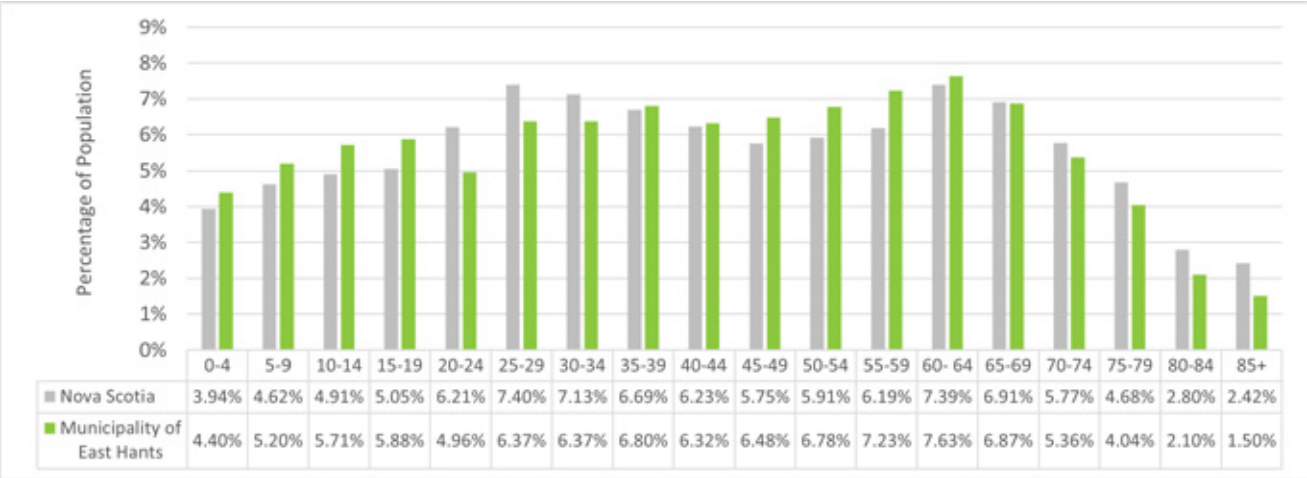
Educational Attainment: Of those over the age of 15, 53.1% have a post-secondary certificate, diploma or degree, aligning closely with the provincial average at 56.7%. East Hants has higher percentage of population with an apprenticeship or trades certificate (11.3%) as well as those with a college diploma (24.6%), compared to the provincial average at 8.4% and 21.04% respectively. The higher percentage of the population with apprenticeships is an advantage for East Hants to leverage construction, manufacturing, and trade sectors.

Household Income: The average household income in East Hants is estimated at $108,914 in 2025, which is slightly higher than the provincial average income at $96,237. East Hants has a slightly higher proportion of households earning $100,000 and over (42.8%), compared to the provincial percentage at 32.8% (**Figure 5-2**). Notably, East Hants has similar breakdown of household income between $60,000 and $99,999, with slightly lower proportion of households earning $20,000 to $39,999 and even lower percentage of households with income below $20,000. Collectively, this data suggests a relatively high proportion of affluent households with smaller income gap between households.

Mobility: East Hants has a similar percentage of total migrants compared to the Province. However, East Hants consistently has higher percentage of internal migrants, particularly intra-provincial migrants. This suggests that East Hants is becoming an increasingly attractive place to live for Nova Scotians, including those from HRM.

Figure 5-1. Age Breakdown

(Source: FBM, Manifold Data Mining Inc. & Statistics Canada, 2025)



	0-4	5-9	10-14	15-19	20-24	25-29	30-34	35-39	40-44	45-49	50-54	55-59	60- 64	65-69	70-74	75-79	80-84	85+
Nova Scotia	3.94%	4.62%	4.91%	5.05%	6.21%	7.40%	7.13%	6.69%	6.23%	5.75%	5.91%	6.19%	7.39%	6.91%	5.77%	4.68%	2.80%	2.42%
Municipality of East Hants	4.40%	5.20%	5.71%	5.88%	4.96%	6.37%	6.37%	6.80%	6.32%	6.48%	6.78%	7.23%	7.63%	6.87%	5.36%	4.04%	2.10%	1.50%

Index	Description
>= 180	Extremely High
>=110 and <180	High
>=90 and <110	Similar
>=50 and <90	Low
<50	Extremely Low

Table 5-1. Demographic Summary Table

(Source: FBM, Manifold Data Mining Inc. & Statistics Canada, 2025)

Attribute	Benchmark: Nova Scotia		Municipality of East Hants, NS		
	value	percent	value	percent	index
SUMMARY					
Total population	1,085,900		26,370		
Total population age 15 and over	939,705		22,333		
Total number of private households	481,655		10,988		
Average number of persons in private households	2.22		2.40		108
POPULATION AGE					
Population age 0-14	146,195	13.46%	4,037	15.31%	114
Population age 15-24	122,352	11.27%	2,859	10.84%	96
Population age 25-34	157,800	14.53%	3,360	12.74%	88
Population age 35-44	140,369	12.93%	3,457	13.11%	101
Population age 45-54	126,573	11.66%	3,497	13.26%	114
Population age 55-64	147,476	13.58%	3,919	14.86%	109
Population age 65+	245,136	22.57%	5,242	19.88%	88
EDUCATION					
Total population aged 15 years and over by highest certificate, diploma, or degree	939,705		22,333		
No certificate, diploma, or degree	154,251	16.42%	3,873	17.34%	106
High school diploma or equivalent	251,151	26.73%	6,597	29.54%	111
Post-secondary certificate, diploma, or degree	534,303	56.86%	11,863	53.12%	93
Postsecondary certificate or diploma below bachelor level	297,958	31.71%	8,429	37.74%	119
Apprenticeship or trades certificate or diploma	78,445	8.35%	2,528	11.32%	136
College, CEGEP or other non-university certificate or diploma	196,806	20.94%	5,496	24.61%	117
University certificate or diploma below bachelor level	22,707	2.42%	402	1.80%	75
University certificate, diploma, or degree at bachelor level or above	236,345	25.15%	3,435	15.38%	61
Bachelor's degree	156,047	16.61%	2,638	11.81%	71
HOUSEHOLD INCOME					
Average family income $	$118,912		$125,925		106
Average household income $	$96,237		$108,914		113
Median household income $	$52,432		$55,462		106
MOBILITY STATUS - 1 YEAR AGO					
Total - Mobility status 1 year ago	1,076,738		26,370		
Non-movers	938,607	87.17%	23,933	90.76%	104
Movers	138,131	12.83%	2,437	9.24%	72
Non-migrants	83,151	7.72%	1,073	4.07%	53
Migrants	54,981	5.11%	1,363	5.17%	101
Internal migrants	48,868	4.54%	1,361	5.16%	114
Intraprovincial migrants	22,702	2.11%	1,108	4.20%	199
Interprovincial migrants	26,166	2.43%	253	0.96%	39
External migrants	6,113	0.57%	3	0.01%	1
MOBILITY STATUS - 5 YEARS AGO					
Total - Mobility status 5 years ago	1,040,263		26,370		
Non-movers	646,426	62.14%	18,570	70.42%	113
Movers	393,836	37.86%	7,800	29.58%	78
Non-migrants	183,216	17.61%	2,474	9.38%	53
Migrants	210,620	20.25%	5,327	20.20%	100
Internal migrants	166,329	15.99%	5,166	19.59%	122
Intraprovincial migrants	86,911	8.36%	3,845	14.58%	174
Interprovincial migrants	79,418	7.63%	1,321	5.01%	66
External migrants	44,291	4.26%	161	0.61%	14

Figure 5-2. Household Income Breakdown

(Source: FBM, Manifold Data Mining Inc. & Statistics Canada, 2025)

	Under $19,999	$20,000 to $39,999	$40,000 to $59,999	$60,000 to $79,999	$80,000 to $99,999	Above $100,000
Nova Scotia	5.48%	17.43%	16.74%	14.80%	12.77%	32.79%
Municipality of East Hants	2.46%	12.92%	13.93%	14.44%	13.51%	42.79%

Employment and Labour

The total labour force for the year-end 2025 in East Hants was 14,537, accounting for approximately 55.5% of the estimated total population in 2025. This includes permanent and temporary employees as well as self-employed individuals. While the breakdown of types of workers is largely similar to the Province as a whole, East Hants has a slightly lower percentage of temporary employees (13.5%) compared to the provincial average at 17.1%.

Prominent Industries and Occupations

The top three North American Industry Classification System (NAICS) industry sectors (where people work) were:

- **Construction (23)**: 1,871 jobs (12.8% of the labour force)
- **Retail Trade (44-45):** 1,680 jobs (11.5%)
- **Health care and social assistance (62)**: 1,588 jobs (10.9%)

Meanwhile, the top three occupational categories (what people do for work) were:

- **Trades, transport and equipment operators and related occupations**: 3,944 jobs (27.4%)
- **Sales and service occupations**: 3,219 jobs (22.4%)
- **Business, finance, and administration occupations**: 2,138 jobs (14.8%)

Relative to the Province, East Hants specializes in certain industries as identified in the following NAICS industries:

- Mining, quarrying, and oil and gas extraction (21)
- Transportation and warehousing (48-49)
- Wholesale trade (41)
- Construction (23)

Relative to the Province, the labour force in East Hants has a lower share of labour in the following NAICS industries:

- Management of companies and enterprises (55)
- Information and cultural industries (51)
- Arts, entertainment and recreation (72)
- Educational services (61)

More details can be found in **Table 5-2** where an index >100 indicates a greater specialization relative to the Province as a whole.

Table 5-2. Labour Force Industry and Occupation

(Source: FBM, Manifold Data Mining Inc. & Statistics Canada, 2025)

Index	Description
>= 180	Extremely High
>=110 and <180	High
>=90 and <110	Similar
>=50 and <90	Low
<50	Extremely Low

Attribute	Benchmark: Nova Scotia		Municipality of East Hants, NS		
	value	percent	value	percent	index
LABOUR FORCE INDUSTRY					
Total labour force population aged 15+ years North American Industry Classification System (NAICS) 2017	587,548		14,637		
Industry - not applicable	11,978	2.04%	233	1.59%	78
All industries	575,570	97.96%	14,404	98.41%	100
11 Agriculture, forestry, fishing, and hunting	20,557	3.50%	422	2.88%	82
21 Mining, quarrying, and oil and gas extraction	2,835	0.48%	184	1.26%	261
22 Utilities	3,607	0.61%	88	0.60%	97
23 Construction	43,244	7.36%	1,871	12.78%	174
31-33 Manufacturing	37,812	6.44%	1,152	7.87%	122
41 Wholesale trade	13,115	2.23%	574	3.92%	175
44-45 Retail trade	72,862	12.40%	1,680	11.48%	93
48-49 Transportation and warehousing	23,538	4.01%	1,243	8.49%	212
51 Information and cultural industries	9,393	1.60%	121	0.83%	52
52 Finance and insurance	19,977	3.40%	375	2.56%	75
53 Real estate and rental and leasing	7,291	1.24%	162	1.11%	89
54 Professional, scientific, and technical services	39,359	6.70%	774	5.29%	79
55 Management of companies and enterprises	559	0.10%	0	0.00%	0
56 Administrative and support, waste management and remediation services	25,417	4.33%	719	4.91%	114
61 Educational services	47,035	8.01%	826	5.64%	70
62 Health care and social assistance	87,633	14.92%	1,588	10.85%	73
71 Arts, entertainment, and recreation	10,226	1.74%	151	1.03%	59
72 Accommodation and food services	36,551	6.22%	689	4.71%	76
81 Other services (except public administration)	23,078	3.93%	534	3.65%	93
91 Public administration	51,482	8.76%	1,249	8.53%	97
OCCUPATION					
Total labour force 15 years and over by occupation	587,548		14,637		
Occupation - not applicable	11,978	2.04%	233	1.59%	78
All occupations	575,570	97.96%	14,404	98.41%	100
0 Management occupations	5,447	0.93%	52	0.36%	39
1 Business, finance, and administration occupations	90,286	15.37%	2,138	14.84%	97
2 Natural and applied sciences and related occupations	39,767	6.77%	905	6.28%	93
3 Health occupations	55,086	9.38%	994	6.90%	74
4 Occupations in education, law and social, community and government services	80,634	13.72%	1,716	11.91%	87
5 Occupations in art, culture, recreation, and sport	15,290	2.60%	200	1.39%	54
6 Sales and service occupations	150,166	25.56%	3,219	22.35%	87
7 Trades, transport and equipment operators and related occupations	97,258	16.55%	3,944	27.38%	165
8 Natural resources, agriculture, and related production occupations	19,884	3.38%	513	3.56%	105
9 Occupations in manufacturing and utilities	21,753	3.70%	497	3.45%	93

Commuting Destination

Among the total labour force population (14,637 workers), 69.7% (or 9,928 workers) have a "usual place of work" or fixed commuting destination (**Table 5-3**; **Figure 5-3**). 19.2% of workers have no fixed workplace address, which is slightly higher than the provincial average at 14.3%. 7.9% work from home, 0.5% work outside of Canada, and 2.7% are reported as uncategorized.

When examining the workforce population who commute to work, 22.1% of the total workers commute within East Hants, 2.9% commute outside of East Hants but still within Hants County, and 0.8% to a different province or territory. Notably, the percentage of workers who commute to outside of the census division of residence (i.e., outside of Hants County) is significantly higher than the provincial average. Amongst commuters in East Hants, 43.9% commute to outside of Hants County for work, compared to the provincial average of 5.9%. These commuting patterns highlight that East Hants is conveniently located within commuting distance to key employment hubs including the HRM.

Mode of Transportation

Table 5-3 highlights the primary mode of transportation for commuting among workers with a usual place of work or with no fixed workplace address (13,020 workers). Of those, over 85.2% (11,095 workers) use vehicles as a main mode of commuting. Approximately 2.0% of commuters use active transportation options for commuting, which includes walking, bicycling, and public transit. It is important to note that this data solely focuses on commuting patterns and is not reflective of all trips being made. As a result, it does not consider the trips made by pedestrians to shops and services, children walking or biking to school, or for social purposes such as a resident visiting their local park.

The high proportion of residents commuting to work using a private vehicle is to be expected for rural municipalities where residents often make long commutes to their jobs and/or where effective transit options are not available.

However, supporting alternatives such as a community transit service can help to reduce the cost of vehicle ownership and provide options for those who may not be able to drive due to disabilities, financial barriers, age, or simply convenience.

Figure 5-3. Commuting Destination

(Source: FBM, Manifold Data Mining Inc. & Statistics Canada, 2025)

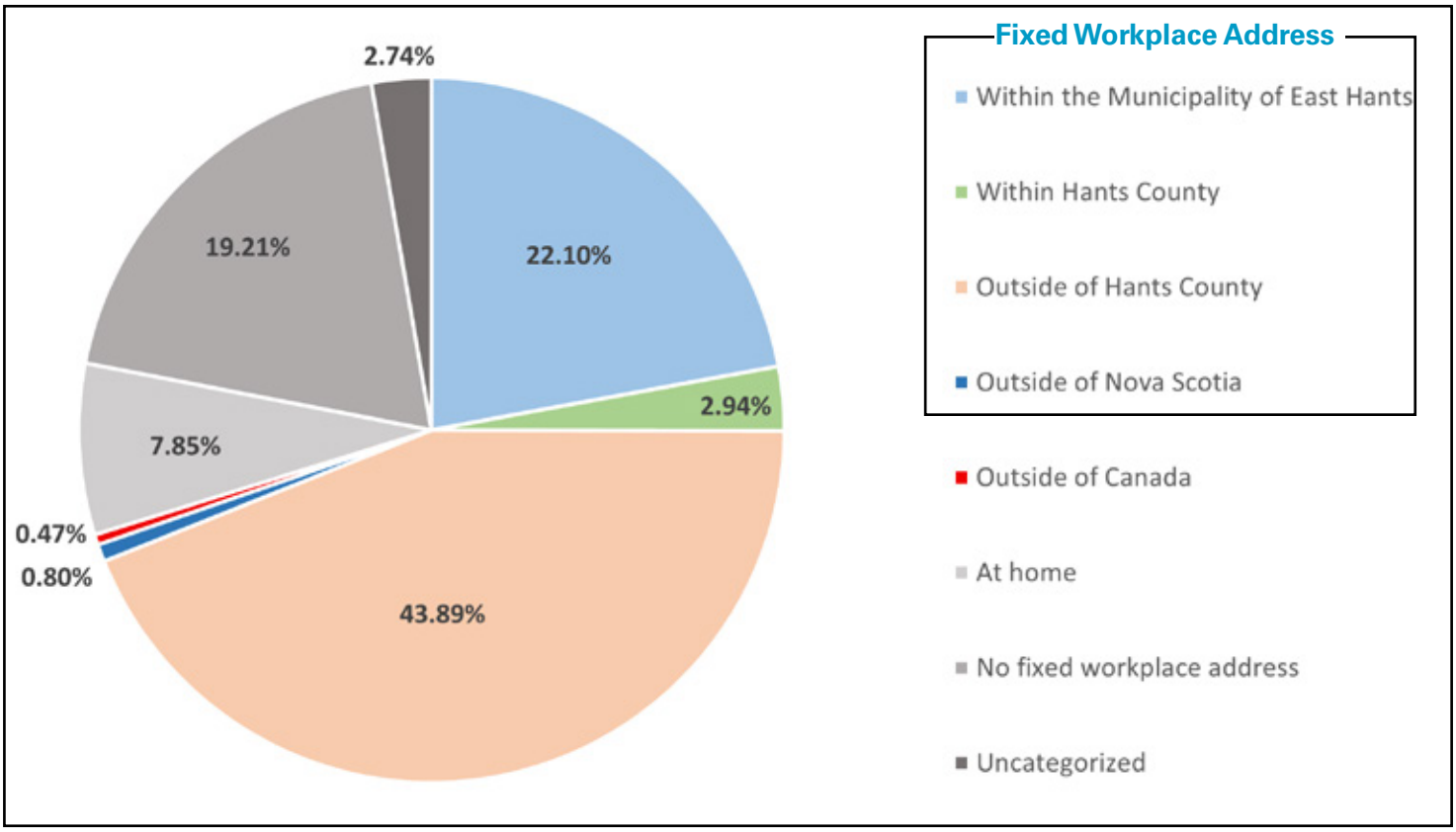


Table 5-3. Labour Force and Commute

(Source: FBM, Manifold Data Mining Inc. & Statistics Canada, 2025)

Index	Description
>= 180	Extremely High
>=110 and <180	High
>=90 and <110	Similar
>=50 and <90	Low
<50	Extremely Low

Attribute	Benchmark: Nova Scotia		Municipality of East Hants, NS		
	value	percent	value	percent	index
CLASS OF WORKER					
Total labour force 15 years and over by class of worker	587,548		14,637		
Class of worker - Not applicable	11,978	2.04%	233	1.59%	78
All classes of worker	575,570	97.96%	14,404	98.41%	100
Employees	509,281	86.68%	12,847	87.77%	101
Permanent position	408,811	69.58%	10,867	74.24%	107
Temporary position	100,470	17.10%	1,980	13.53%	79
Fixed term (1 year or more)	26,467	4.51%	474	3.24%	72
Casual, seasonal or short-term position (less than 1 year)	74,002	12.60%	1,506	10.29%	82
Self-employed	66,289	11.28%	1,557	10.64%	94
PLACE OF WORK					
Total employed labour force 15 years and over by place of work status	552,723		14,236		
At home	52,853	9.00%	1,118	7.85%	87
Outside Canada	1,195	0.20%	67	0.47%	233
No fixed workplace address	84,122	14.32%	2,735	19.21%	134
Usual place of work	414,553	70.56%	9,928	69.74%	99
COMMUTING DESTINATION					
Total employed labour force 15 years and over with a usual place of work commuting destination	414,553		10,208		
Commute within census subdivision (CSD) of residence	312,425	53.17%	2,256	22.10%	42
Commute to a different census subdivision (CSD) within census division (CD) of residence	62,317	10.61%	300	2.94%	28
Commute to a different census subdivision (CSD) and census division (CD) within province or territory of residence	34,729	5.91%	4,480	43.89%	742
Commute to a different province or territory	5,083	0.87%	82	0.80%	93
MODE OF TRANSPORTATION					
Total employed labour force 15 years and over who commute to work by mode of transportation	498,675		13,020		
Car, truck or van	433,466	73.78%	11,095	85.22%	116
Car, truck, van, as driver	396,178	67.43%	10,371	79.66%	118
Car, truck, van, as passenger	37,289	6.35%	724	5.56%	88
Public transit	22,198	3.78%	70	0.54%	14
Walked	30,377	5.17%	191	1.47%	28
Bicycle	2,182	0.37%	0	0.00%	0
Other method	10,452	1.78%	225	1.73%	97
COMMUTING DURATION					
Total employed population aged 15 years and over with a usual place of work	498,675		13,020		
Less than 15 minutes	189,428	32.24%	2,625	20.16%	63
15 to 29 minutes	187,810	31.97%	3,037	23.33%	73
30 to 44 minutes	77,028	13.11%	3,751	28.81%	220
45 to 59 minutes	22,007	3.75%	1,435	11.02%	294
60 minutes and over	22,401	3.81%	733	5.63%	148

5.3 Trade Area Summary

Identifying the Trade Area is important for understanding the total market potential available to current and future businesses. It is important to note that the Trade Area boundary does not always align with municipal boundaries; the major considerations in delineating Retail Trade Area are outlined below.

Retail Trade Area Determinants:

1. Transportation networks, including streets and highways, which affect access, travel times, commuting and employment distribution patterns;
2. Major infrastructure projects (both planned or under development) which will affect future travel patterns;
3. Growth and development vision, including an understanding of area characteristics and potential target 'audience';
4. Local and regional competitive environment, present and future;
5. Proposed generative land uses (retail, cultural, civic, etc.) and their relationship within the wider market;
6. Significant natural and man-made barriers (e.g., water features, highways, industrial areas);
7. De facto barriers resulting from notable socioeconomic differentiation, and
8. Patterns of existing and future residential and commercial development.

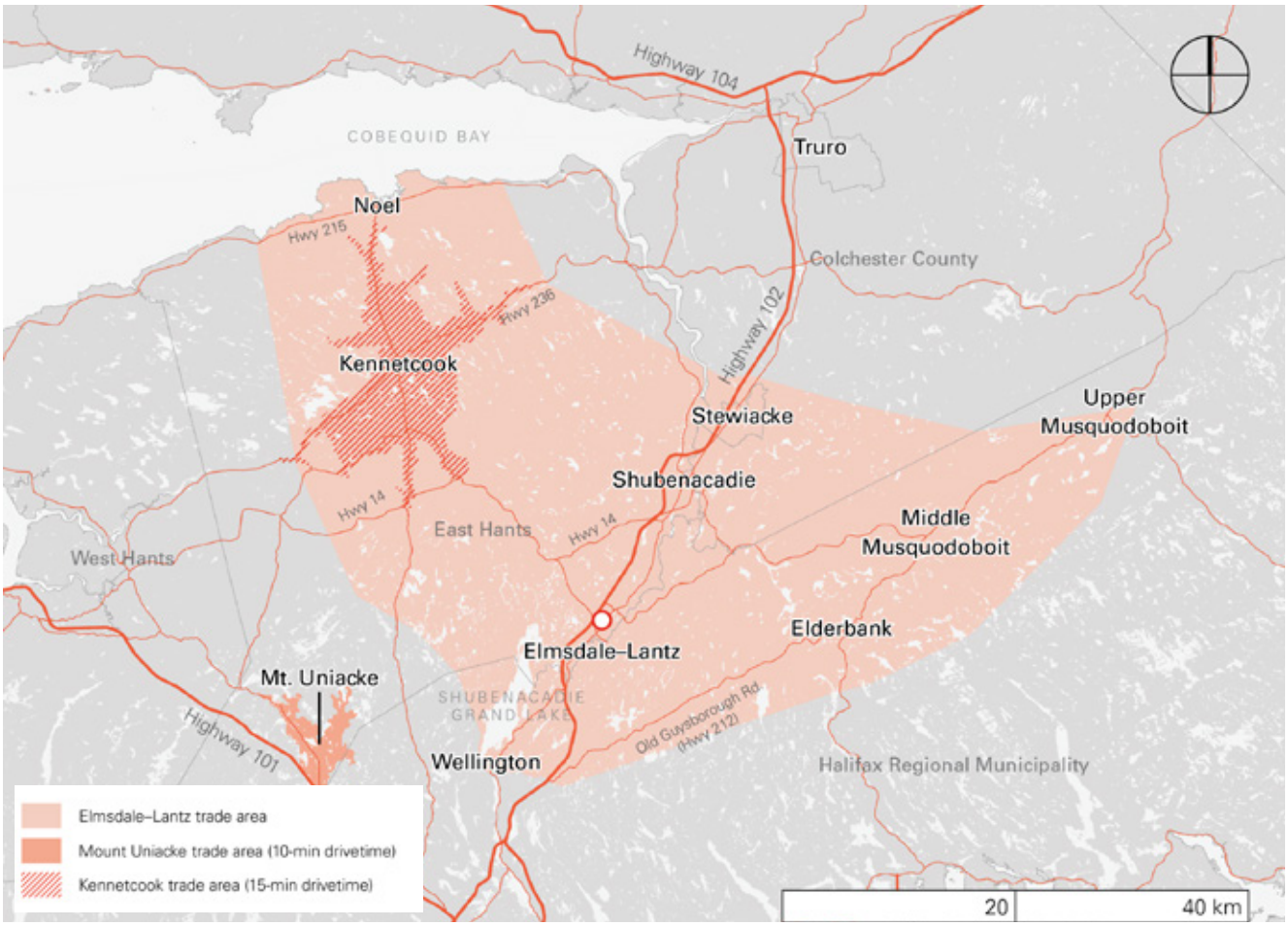
Elmsdale / Lantz Corridor Trade Area

This Trade Area includes several key communities along Highway 102, including Elmsdale, Enfield, Lantz, Milford, and Shubenacadie, as well as surrounding key communities such as Kennetcook, Stewiacke, and HIA. The total population in this Trade Area is conservatively estimated at 33,594 in 2025 and is expected to be at 37,572 by 2035.

Figure 5-4 presents the location of the Trade Area.

Figure 5-4. Elmsdale-Lantz Retail Trade Area

(Source: FBM, replicated from Cushing Terrell from 2018 Retail Market Study)



5.4 Trade Area Retail Spending Profile

Detailed information of retail spending within the Trade Area was collected from Manifold Data Mining Inc., a leading supplier of demographic and consumer expenditure information, using 2025 year end data. The data was consolidated into 22 specific spending categories in order to build a spending profile for the Trade Area.

These spending categories, as shown in **Table 5-4** include:

1. Grocery & Specialty Foods
2. Pharmacy
3. Alcohol & Tobacco
4. Personal Services
5. *Health Care & Medical Services****
6. Fashion & Accessories
7. Jewelry
8. Beauty & Personal Care
9. Home Furniture & Decor
10. Appliances & Electronics
11. Home Improvement & Gardening
12. Books & Media
13. Sporting Goods
14. Toys & Hobbies
15. Specialty Retail
16. Quick Service F&B
17. Restaurants & Pubs
18. Arts & Entertainment
19. Fitness & Leisure
20. Auto Parts & Accessories
21. Auto / RV / Motorsports Dealership
22. *Auto Fuel****

*****While categories such as "Health Care and Medical Services" and "Auto Fuel" have an associated household expenditure, they are only included in the spending profile and not quantified in the overall demand. Health Care & Medical Services do not have a typical productivity associated with them for forecasting space since a large component of the business model is not a traditional fee-for-service or fee-for-product model and involves a direct insurance payment.*

Having established the respective Trade Area boundary and population, the size of the retail market's spending potential was quantified.

The task involved developing an understanding of Trade Area residents' household spending on shopping and leisure for each of 22 categories. **Table 5-4** illustrates the spending potential profile with an emphasis on the Elmsdale-Lantz corridor Trade Area.

Overall, the Elmsdale - Lantz corridor represents an approximate $455 million retail market which increases to almost $464 million including estimated retail sales inflow generated by highway motorists and non-frequent visitors to the area such as business travelers or leisure visitors.

This core value of spending represents the potential against which retailers must market themselves for garnering retail spending and therefore demand. As the corridor continues to grow with a number of under construction and proposed housing units, the retail potential (i.e. demand) will continue to grow and present viable and meaningful opportunities for expansion and attraction of new-to-market retailers of many sizes and formats from local independent to junior and larger format branded retailers.

Table 5-4. Trade Area Spending Potential - 2025

(Source: FBM, Manifold Data Mining Inc. & Statistics Canada, 2025)

Retail Spending by Merchandise Category		2025 ELMSDALE - LANTZ CORRIDOR TRADE AREA Household Retail Spending	2025 ELMSDALE - LANTZ CORRIDOR Aggregate Retail Spending	2025 ELMSDALE - LANTZ CORRIDOR Misc Inflow Spending
Convenience & Day-to-Day Goods/Services	Grocery & Convenience	$8,382	$109,077,920	$2,181,558
	Pharmacy	$812	$10,563,143	$211,263
	Alcohol & Tobacco	$1,313	$17,081,281	$341,626
	Personal Services	$2,648	$34,457,428	$344,574
	Health Care & Medical Services	$605	$7,876,103	
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Accessories	$1,965	$25,573,037	$255,730
	Jewelry	$143	$1,866,672	$9,333
	Beauty & Personal Care	$774	$10,067,593	$100,676
	Home Furniture & Décor	$860	$11,189,929	$223,799
	Appliances & Electronics	$1,396	$18,163,404	$90,817
	Home Improvement & Gardening	$3,090	$40,207,355	$804,147
	Books & Media	$759	$9,872,804	
	Sporting Goods	$292	$3,798,259	$18,991
	Toys & Hobbies	$271	$3,531,834	$17,659
	Specialty Retail	$1,172	$15,245,408	$381,135
Leisure, Recreation & Entertainment Goods/Services	Quick Service F&B	$1,748	$22,741,248	$1,137,062
	Restaurants & Pubs	$2,118	$27,556,150	$275,562
	Arts & Entertainment	$116	$1,511,708	$7,559
	Fitness & Leisure	$323	$4,200,555	
Automotive Goods (excluding repair)	Auto Parts & Accessories	$2,162	$28,133,642	$703,341
	Auto/RV/Motorsports Dealership	$3,942	$51,299,077	$2,564,954
	TOTAL CATEGORIES	**$34,889**	**$454,014,548**	**$9,669,786**
	TOTAL (excluding Health Care & Auto)	**$28,180**	**$366,705,727**	**$6,401,492**

Section 6: Business Inventory

6.0 Business Inventory

6.1 Introduction

Industrial, office, and retail uses can be found across East Hants. For the purpose of this analysis, East Hants is divided into three broad inventory sectors: Central, West, and East. To allow for further depth to this analysis, each sector is divided into smaller sub-areas, called "clusters". The locations of the clusters and how they fit within the three broad sectors are shown in **Figure 6-1**, with detailed maps of each sub-node provided in **Appendix D**. The communities including Upper Rawdon, Maitland, Noel, Walton and others along the Fundy Shore are excluded due to their small and dispersed locations.

Commercial and industrial uses are predominantly concentrated along major roads, where convenient access to major interchanges or highway access points is within short reach. Such attributes are a necessity for larger commercial and industrial endeavors.

6.2 North American Industry Classification System (NAICS)

The documented inventory of businesses from on-the-ground video and photographic fieldwork in East Hants' West, Central and East Sectors was organized and sorted by the twenty NAICS industries is shown in **Table 6-1.** The table illustrates a total in those identified areas of approximately 2,697 employees across an estimated 309 businesses. It is important to note that this number of business does not reflect the full number of registered businesses across the municipality, but rather reflects those documented in the identified and mapped Sectors.

It also excludes home-based businesses and other businesses that may not have outward facing names on buildings or spaces, or located in rural contexts that are outside of the core identified sectors.

Employment estimates are based on applying typical and reasonable ratios as shown in **Table 6-1** and summarized in **Table 6-4**. Further, each node's individual businesses were examined to sensitize applicable employment density assumptions to reflect market realities where reasonable.

6.3 Municipality-wide Summary

Tables 6-2 and 6-3 summarize the key profile data for the whole municipality across all of the identified nodes. A combination of business directory data provided by East Hants, on the ground fieldwork conducted by FBM and secondary desktop research was used to validate business type, location and status. The results of this analysis are used throughout the report and generally align with the business directory data within a reasonable margin of error. Parcel boundaries were based on the data according to the data from East Hants.

The results yield a total non-residential business area inventory of over 2.26 million sf with a low vacancy of 4.0% illustrating a competitive market. Since almost 60% of East Hants' building inventory is industrial (refer to **Figure 6-1**), the vacancy for retail and office commercial uses is estimated to be less than 2% which is a further indication of strong demand.

Table 6-1. Employment Density Assumptions by NAICS
(Source: FBM)

North American Industry Classification System (NAICS) 2018 - Canada	Est. Employees per 1,000 sf	Est. sf per Employee	Est. Employees per Acre
11 Agriculture, Forestry, Fishing and Hunting	0.2 – 0.5	2,000 – 5,000	<1 - 5
21 Mining, Quarrying, and Oil and Gas Extraction	0.3 – 0.6	1,600 – 3,300	1 - 4
22 Utilities	0.5 – 1.0	1,000 – 2,000	5 - 10
23 Construction	1.0 – 2.0	500 – 1,000	12 - 25
31-33 Manufacturing	1.3 – 2.5	400 – 750	15 - 35
41 Wholesale Trade	0.8 – 1.2	800 – 1,250	10 - 18
44-45 Retail Trade	2.0 - 4.0	250 - 500	20 - 30
48-49 Transportation and Warehousing	0.4 – 0.8	1,250 – 2,500	5 - 12
51 Information and Cultural Industries	4.0 – 6.0	175 – 250	60 - 90
52 Finance and Insurance	5.0 – 6.5	150 – 200	75 - 100
53 Real Estate and Rental and Leasing	3.0 – 4.0	250 – 330	45 - 65
54 Professional, Scientific and Technical Services	4.0 – 5.5	180 – 250	60 - 85
55 Management of Companies and Enterprises	4.5 – 6.0	160 – 220	70 - 95
56 Adminsitrative and Support, Waste Management and Remediation Services	2.5 – 4.0	250 – 400	35 - 60
61 Educational Services	2.0 – 3.5	280 – 500	30 - 55
62 Health Care and Social Assistance	2.5 – 4.0	250 – 400	40 - 65
71 Arts, Entertainment and Recreation	1.0 – 2.5	400 – 1,000	10 - 30
72 Accommodation and Food Services	3.0 – 5.0	200 – 330	40 - 75
81 Other Services (Except Public Administration)	2.0 – 3.0	330 – 500	25 - 45
91 Public Administration	4.0 – 5.0	200 – 250	60 - 80

Source: Statistics Canada http://www.statcan.gc.ca/pub/12-501-x/12-501-x2012001-eng.pdf
Source: FBM Project History Case Studies supplemented byreviewed and validated AI Research

Figure 6-1. Municipality-wide Non-Residential Locations Sector Map

(Source: FBM)

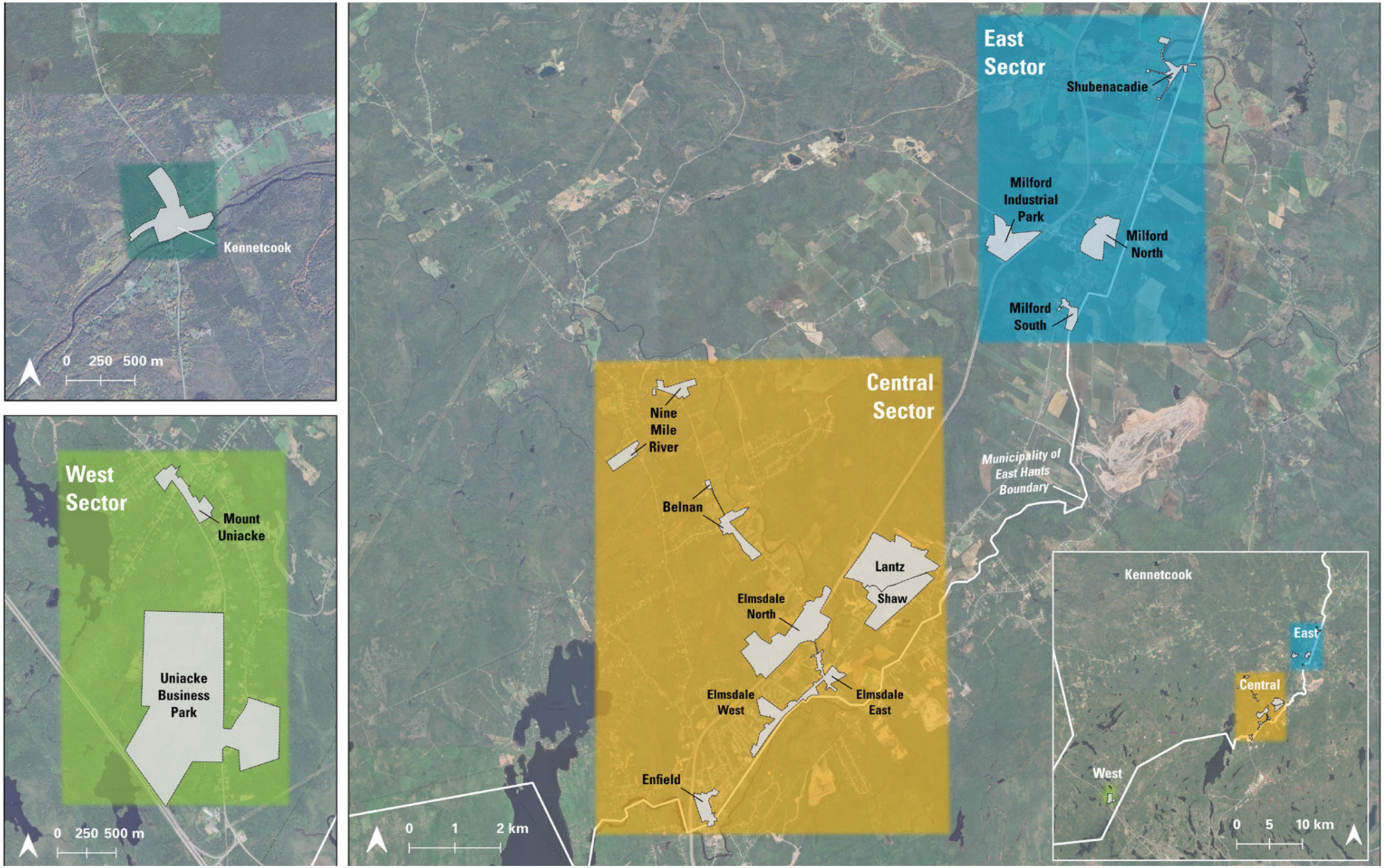


Table 6-2. Municipality-wide Inventory Summary
(Source: FBM)

Sector & Sub-Node	Industrial Building Area (sf)	Retail Building Area (sf)	Retail/Auto Building Area (sf)	Office Building Area (sf)	Vacant Building Area (sf)	Vacant Building Area (%)	Vacant Land/Lot Area (ac)	Total Building Area (sf)	Total Land Area (ac)	Overall Land Utilization Estimate
Uniacke Business Park	343,402	37,568	35,570	6,485	31,599	7.0%	11.6	454,624	249.1	4.2%
Mount Uniacke	7,740	16,598	0	0	0	0.0%	0.0	24,338	7.1	7.9%
WEST SUB-TOTAL	***351,141***	***54,166***	***35,570***	***6,485***	***31,599***	**6.6%**	***11.6***	***478,962***	***256.2***	**4.3%**
Nine Mile River	7,973	0	965	0	0	0.0%	0.0	8,938	56.8	0.4%
Belnan	7,960	11,622	2,700	0	0	0.0%	0.0	22,282	19.6	2.6%
Elmsdale N	414,326	314,856	23,535	42,627	24,146	2.9%	1.7	819,489	235.1	8.0%
Elmsdale E	36,526	16,542	14,789	29,246	1,246	1.3%	0.0	98,348	36.1	6.2%
Elmsdale W	99,324	25,126	33,967	15,679	2,257	1.3%	2.0	176,353	71.8	5.6%
Shaw	260,631	16,879	0	0	23,754	7.9%	0.0	301,264	103.9	6.7%
Lantz	4,495	0	0	3,741	0	0.0%	0.0	8,236	2.1	9.2%
Enfield	1,142	61,636	0	13,126	1,739	2.2%	0.0	77,644	24.6	7.2%
CENTRAL SUB-TOTAL	***832,378***	***446,661***	***75,956***	***104,419***	***53,142***	**3.5%**	***3.7***	***1,512,555***	***550.0***	**6.3%**
Kennetcook	0	20,393	0	3,825	0	0.0%	0.0	24,217	11.9	4.7%
KENNETCOOK SUB-TOTAL	***0***	***20,393***	***0***	***3,825***	***0***	**0.0%**	***0***	***24,217***	***11.9***	**4.7%**
Milford Industrial Park	56,966	7,982	29,934	0	0	0.0%	20.1	94,881	120.4	1.8%
Milford N	24,008	18,732	0	0	0	0.0%	0.0	42,739	32.4	3.0%
Milford S	21,969	0	0	0	2,504	10.2%	0.0	24,473	22.3	2.5%
Shubenacadie	19,653	34,374	4,437	27,157	3,432	3.9%	0.1	89,054	15.7	13.0%
EAST SUB-TOTAL	***122,596***	***61,088***	***34,370***	***27,157***	***5,936***	**2.4%**	***20.2***	***251,147***	***214.5***	**3.0%**
Total	1,306,115	582,307	145,896	141,886	90,677	4.0%	35.5	2,266,881	1,008.9	5.2%

Municipality-wide Inventory Summary Share of Building Floorspace by Primary Use
(Source: FBM)

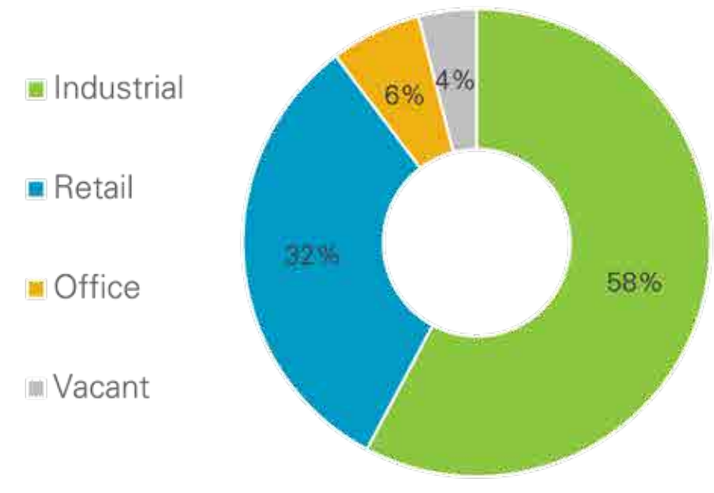


Table 6-3. Employment & Employment Density Breakdown by Sector Sub-Node
(Source: FBM)

Share of Employees	Employees Per Acre	Building Area Per Employee (sf)	Estimated Number of Employees	Sector Sub-Node
42%	4.8	674	1,123	Elmsdale North
17%	1.8	770	455	Uniacke Business Park
8%	3.0	756	216	Elmsdale West
7%	4.9	547	178	Elmsdale East
6%	10.0	511	153	Shubenacadie
6%	6.1	491	149	Enfield
4%	1.1	2,346	118	Shaw
3%	0.7	1,020	83	Milford Industrial Park
2%	2.0	661	65	Milford North
2%	4.7	510	54	Kennetcook
1%	1.8	647	34	Belnan
2%	5.7	600	41	Mount Uniacke
0%	0.2	798	11	Nine Mile River
0%	4.8	839	10	Lantz
0%	0.4	3,106	8	Milford South
100%	2.7	841	2,697	

Table 6-4. Municipality-wide NAICS Summary
(Source: FBM)

Number of Employees	Number of Businesses	NAICS Classification
11	2	11 Agriculture, Forestry, Fishing and Hunting
1	1	21 Mining, Quarrying, and Oil and Gas Extraction
3	1	22 Utilities
199	40	23 Construction
605	34	31 Manufacturing
134	16	41 Wholesale Trade
860	75	44 Retail Trade
12	4	48 Transportation and Warehousing
9	2	51 Information and Cultural Industries
78	7	52 Finance and Insurance
37	10	53 Real Estate and Rental and Leasing
69	13	54 Professional, Scientific and Technical Services
0	0	55 Management of Companies and Enterprises
82	5	56 Administrative and Support, Waste Management and Remediation Services
3	1	61 Educational Services
127	15	62 Health Care and Social Assistance
40	8	71 Arts, Entertainment and Recreation
180	28	72 Accommodation and Food Services
225	44	81 Other Services (Except Public Administration)
23	3	91 Public Administration
2,697	309	

Of the total building area, industrial uses account for an estimated 1,306,115 sf (58% of total built building inventory). Retail (including auto) accounts for an estimated 728,203 sf 32% of total built building area), with the remaining 6% (141,886 sf) occupied by office commercial uses.

Overall employment density based on the documented inventory is estimated at 2.7 employees per acre or 841 sf of building area per employee. Overall land utilization is estimated at just over 5.0%, which is low, yet indicative of the vehicle oriented, suburban/rural context of East Hants' land uses and notable industrial locations in areas like Elmsdale, Mount Uniacke and Milford.

6.4 Central Sector Profile

The Central Sector primarily includes Elmsdale Business Park and covers communities primarily located along or just off the heavily traveled Highway 102 corridor. The map shown in **Figure 6-2** provides a visual overview of the Central Sector's non-residential inventory. Clusters in this sector are comprised of the following sub areas:

- Elmsdale (North, East, and West)
- Belnan / Nine Mile River
- Shaw
- Lantz
- Enfield

Inventory Summary

The overall profile of the Central Sector is summarized in **Table 6-5** which confirms that Elmsdale is the most developed community comprising a broad share of retail, office, and industrial uses.

Total occupied business inventory in the Central Sector is estimated at 1,459,413 sf in over 190 businesses. The inventory is broken down into the following primary uses:

Industrial	***832,378 sf***
Retail (including Auto)	***522,616 sf***
Office	***104,419 sf***

Elmsdale North offers the largest mix of industrial and retail businesses, with a building vacancy rate of approximately 3.5%. Compared to the other clusters in Elmsdale, Elmsdale East offers more quasi-retail and office spaces, including health care as well as personal and professional services. The Elmsdale North node is at capacity and should be a prime location for land expansion consideration.

Enfield is primarily a local-serving retail cluster, with a number of multi-tenant buildings.

Outside of the Highway 102 Corridor, the smaller communities of Nine Mile River and Belnan have correspondingly small clusters of businesses. Belnan has experienced some recent new development, which could be a precursor for further infill/new development over the next decade.

Overall, the Central Sector has a very low vacancy rate at 3.5%, suggesting that existing buildings are filled with businesses and at capacity, requiring new development lands for industrial and commercial businesses specifically. Representative imagery of some vacancies is shown in **Figure 6-4.**

In terms of overall land utilization, or the amount of developed building space measured against the land area, the Central Sector is estimated at 6.3%, which is the highest ratio across the various Sectors and is indicative of the older nature of the area and the emergence as a vehicle-dominated industrial and commercial suburban hub.

Employment & Business Mix Summary

Referring to **Table 6-5**, the Central Sector is home to a total estimated employment base of 1,793 workers or 67% of East Hants' inventoried employment. Because of the Central Sector location within the wider suburban community, the area benefits from significant inflow of employees from outside of the municipal resident base. Similarly, many East Hants residents in the area commute to external locations like Halifax, Dartmouth, Bedford and Truro.

The estimated employment base is broken down into the following primary uses:

Industrial	***609 persons***
Retail	***1,018 persons***
Office	***261 persons***

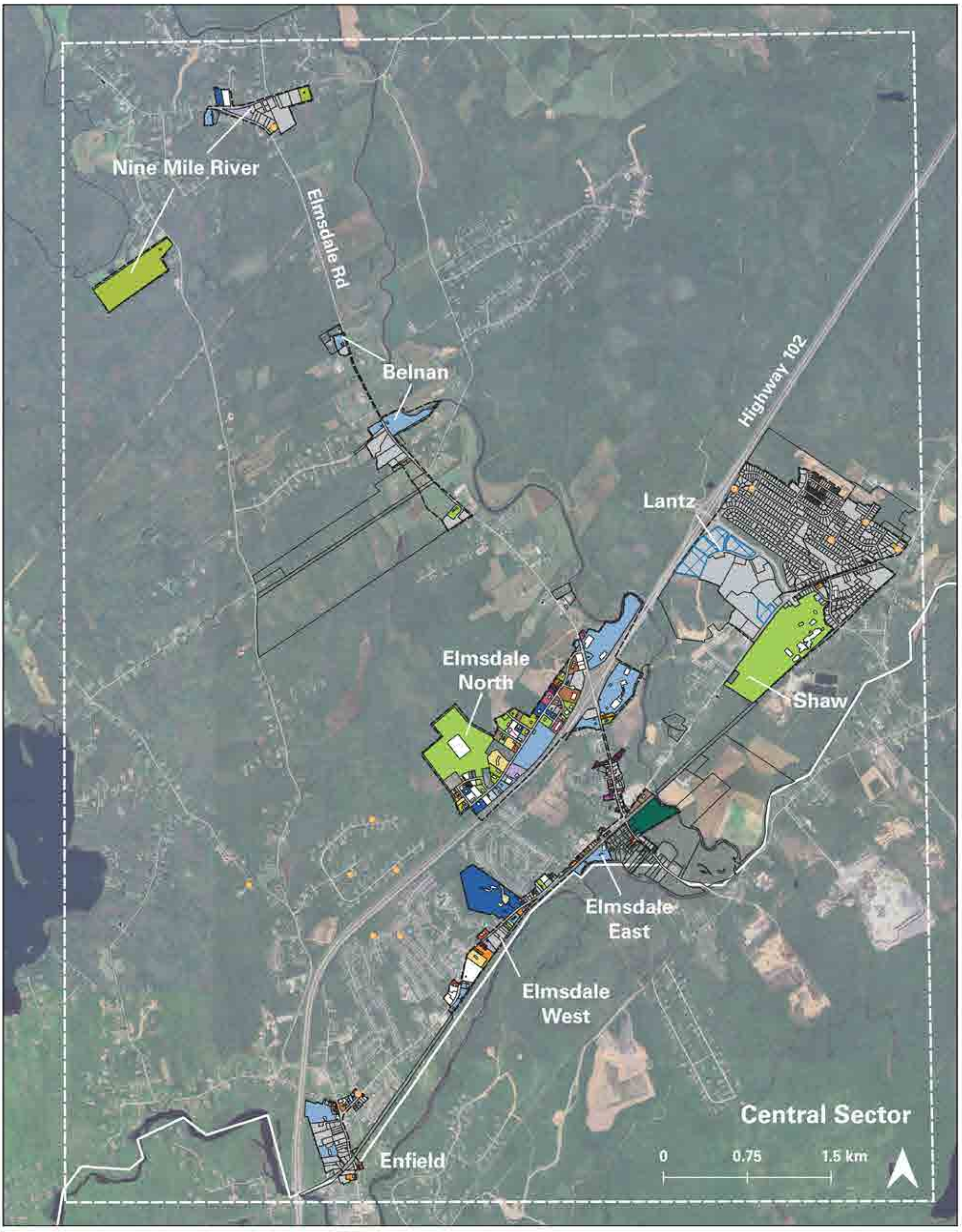
As a strong confluence of regional industrial and commercial land uses, the share of employees in these two respective industries illustrate the emerging strength of the area as a major employment centre, with a variety of business sizes and formats.

The Top employment categories by NAICS code include:

Retail Trade	***708 persons***
Manufacturing	***305 persons***
Accommodation & Food Services	***148 persons***
Services (except Public Admin)	***124 persons***
Health Care & Social Assistance	***104 persons***

Figure 6-2. Central Sector Inventory Locations Map

(Source: FBM)



NAICS Codes

- Agriculture, Forestry, Fishing and Hunting
- Mining, Quarrying, and Oil and Gas Extraction
- Utilities
- Construction
- Manufacturing
- Wholesale Trade
- Retail Trade
- Transportation and Warehousing
- Information and Cultural Industries
- Finance and Insurance
- Real Estate and Rental and Leasing
- Professional, Scientific and Technical Services
- Management of Companies and Enterprises
- Adminsitrative and Support, Waste Management and Remediation Services
- Educational Services
- Health Care and Social Assistance
- Arts, Entertainment and Recreation
- Accommodation and Food Services
- Other Services (Except Public Administration)
- Public Administration
- Other uses (non-commercial / non-industrial)
- Vacant
- Undeveloped
- To be Confirmed
- Cluster Boundary
- Sector Boundary
- Kiln Creek New Commercial Area

Table 6-5. Central Sector Inventory Summary

(Source: FBM)

	Central Sector	Share of Municipal Total
Business Count	190	61%
Home Based Businesses (est)	13	59%
Inventory (sf)	1,512,555	67%
Employment (persons) - see bottom for industry breakdown	1,793	68%
Vacant (sf)	53,142	67%
Vacant (%) / *Index to Municipal Average*	3.5%	*100%*
Industrial Inventory (sf)	832,378	64%
Industrial Employment	609	56%
Employment Ratio (sf/emp)	1,366	
Retail Inventory (sf)	522,616	72%
Retail Employment	1,011	78%
Employment Ratio (sf/emp)	517	
Office Inventory (sf)	104,419	74%
Office Employment	261	76%
Employment Ratio (sf/emp)	400	
Land Utilization / *Index to Municipal Average*	7.3%	*143.9%*

Employment By NAICS Code	Central Sector
Agriculture, Forestry, Fishing and Hunting	11
Mining, Quarrying, and Oil and Gas Extraction	0
Utilities	3
Construction	79
Manufacturing	305
Wholesale Trade	90
Retail Trade	708
Transportation and Warehousing	2
Information and Cultural Industries	1
Finance and Insurance	69
Real Estate and Rental and Leasing	28
Professional, Scientific and Technical Services	62
Management of Companies and Enterprises	0
Administrative and Support, Waste Management and Remediation Services	80
Educational Services	3
Health Care and Social Assistance	104
Arts, Entertainment and Recreation	30
Accommodation and Food Services	148
Other Services (Except Public Administration)	124
Public Administration	2

Figure 6-3. Central Sector Fieldwork Photos

(Source: FBM)

Figure 6-4. Vacancies in the Central Sector

(Source: FBM)

293 Park Road

20 Development Drive

31 Highway 277

1 Enterprise Way

6.5 West Sector Profile

The West Sector covers the community of Mount Uniacke, including Uniacke Business Park. The map shown in **Figure 6-5** provides a visual overview of the West Sector's non-residential inventory.

Clusters in this sector are:

- Uniacke Business Park;
- Mount Uniacke.

Inventory Summary

The West Sector is dominated by industrial businesses, particularly construction and manufacturing industries. Industrial uses are found throughout the Uniacke Business Park, with the northern portion of the park being the and along Nova Scotia Trunk 1 most densely packed and fully built-out areas.

The total occupied business inventory in the West Sector is estimated at 447,362 sf in over 51 businesses. The inventory is broken down into the following primary uses:

Industrial	***351,141 sf***
Retail (including Auto)	***89,736 sf***
Office	***6,485 sf***

A few retail businesses are also present in Uniacke Business Park, including those in retail trade and food sectors. This will increase with new development situated at the intersection of Nova Scotia Trunk 1 at Etter Rd, which will add approximately 10,000 sf of new mixed-commercial space.

The southern portion of the Uniacke Business Park offers several multi-tenant buildings, with two new multi-tenant buildings fronting Nova Scotia Trunk 1 with a mix of new retail tenancies. Together with only limited availability of vacant lots and vacant buildings, these new multi-tenant buildings suggest an increased appetite for commercial and industrial activities.

Outside of Uniacke Business Park, the community of Mount Uniacke offers a scattering of retail and industrial businesses, many of which are located along Nova Scotia Trunk 1 in the northern and southern portions of the Business Park cluster boundary, some of which could be considered home-based businesses.

As noted in the Uniacke Secondary Plan, the main concerns for development in this area are poor water quality resulting in challenging lands that will limit larger scale expansion of industrial lands and more specific needs for local-serving retail, which is in the process of being addressed with new multi-tenant space along Nova Scotia Trunk 1 at Etter Rd.

Overall, the West Sector has a vacancy rate of 6.6%, with most available spaces located in very new buildings in the Business Park and along Nova Scotia Trunk 1. In reality, since much of the vacancy is new, the actual vacancy is very low and supportive of the idea that there are very limited opportunities. Representative imagery of some vacancies is shown in **Figure 6-7.**

In terms of overall land utilization, or the amount of developed building space measured against the land area, the West Sector is estimated at 4.3%, which is low and indicative of favourable land values that allowed for development to have smaller buildings on larger lots as illustrated in **Figure 6-6**. Many of the uses are warehouse or construction-based which further contributes to lower land utilization rates.

Employment & Business Mix Summary

Referring to **Table 6-6**, the West Sector is home to a total estimated employment base of 476 persons or 18% of East Hants' inventoried employment. The West Sector likely benefits from employment inflow from closer areas such as Windsor and Upper Sackville as well as outer parts of HRM along the Highway 101 corridor.

The estimated employment base is broken down into the following primary uses:

Industrial	***382 persons***
Retail	***104 persons***
Office	***9 persons***

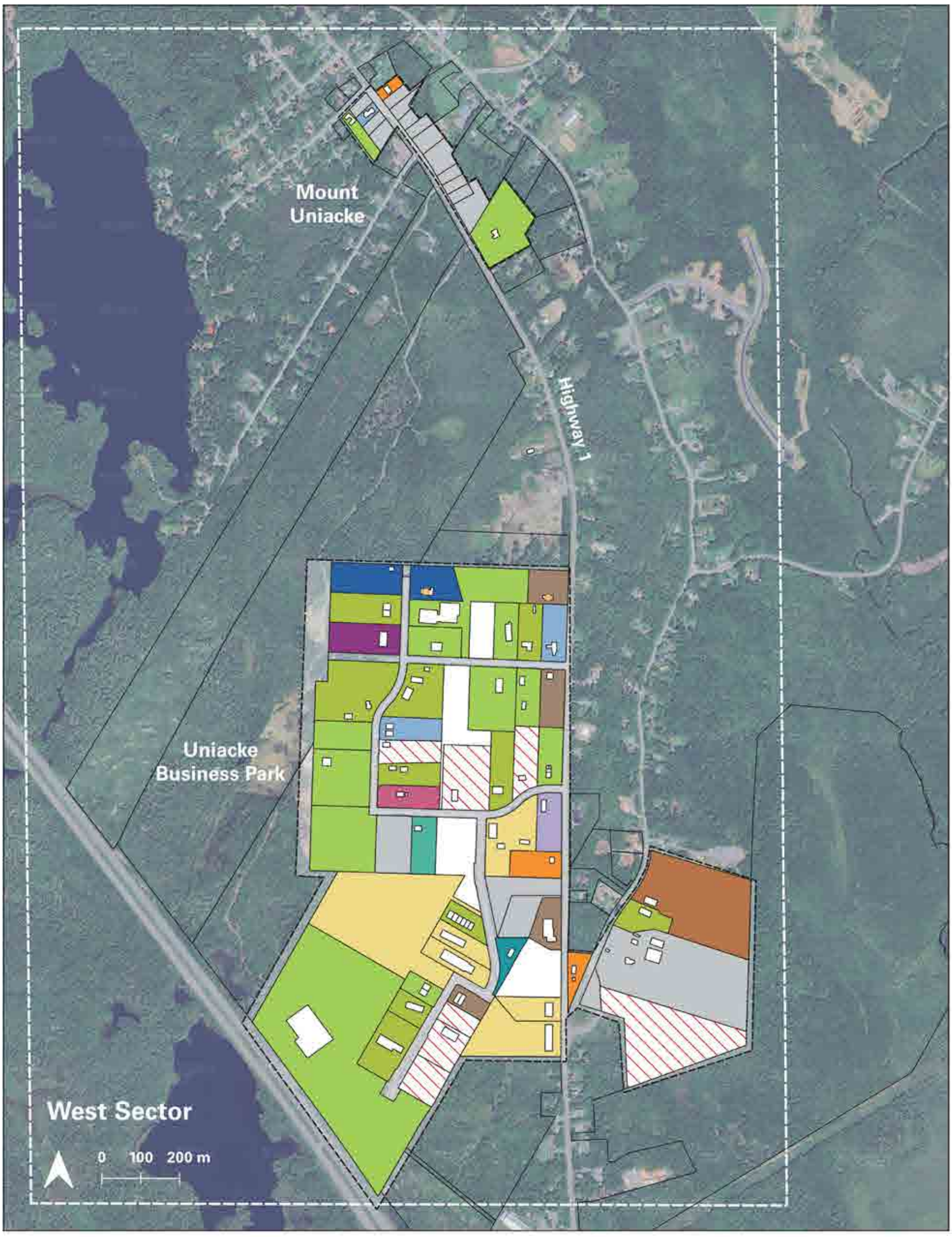
As a strong confluence of regional industrial and commercial land uses, the share of employees in these two respective industries illustrate the emerging strength of the area as a major employment centre, with a variety of business sizes and formats.

The Top employment categories by NAICS code include:

Manufacturing	***246 persons***
Construction	***96 persons***
Services (except Public Admin)	***59 persons***
Accommodation & Food Services	***20 persons***
Retail Trade	***40 persons***

Figure 6-5. West Sector Inventory Locations Map

(Source: FBM)



NAICS Codes

- Agriculture, Forestry, Fishing and Hunting
- Mining, Quarrying, and Oil and Gas Extraction
- Utilities
- Construction
- Manufacturing
- Wholesale Trade
- Retail Trade
- Transportation and Warehousing
- Information and Cultural Industries
- Finance and Insurance
- Real Estate and Rental and Leasing
- Professional, Scientific and Technical Services
- Management of Companies and Enterprises
- Adminsitrative and Support, Waste Management and Remediation Services
- Educational Services
- Health Care and Social Assistance
- Arts, Entertainment and Recreation
- Accommodation and Food Services
- Other Services (Except Public Administration)
- Public Administration
- Other uses (non-commercial / non-industrial)
- Vacant
- Undeveloped
- To be Confirmed
- Cluster Boundary
- Sector Boundary

Table 6-6. West Sector Inventory Summary

(Source: FBM)

	West Sector	Share of Municipal Total
Business Count	51	17%
Home Based Businesses (est)	2	9%
Inventory (sf)	478,962	21%
Employment (persons) - see bottom for industry breakdown	495	19%
Vacant (sf)	20,723	26%
Vacant (%) / *Index to Municipal Average*	4.3%	*123%*
Industrial Inventory (sf)	351,141	27%
Industrial Employment	382	35%
Employment Ratio (sf/emp)	919	
Retail Inventory (sf)	89,736	12%
Retail Employment	104	8%
Employment Ratio (sf/emp)	865	
Office Inventory (sf)	6,485	5%
Office Employment	9	3%
Employement Ratio (sf/emp)	690	
Land Utilization / *Index to Municipal Average*	4.3%	*84.2%*

Employment By NAICS Code	West Sector
Agriculture, Forestry, Fishing and Hunting	0
Mining, Quarrying, and Oil and Gas Extraction	1
Utilities	0
Construction	96
Manufacturing	246
Wholesale Trade	7
Retail Trade	40
Transportation and Warehousing	3
Information and Cultural Industries	8
Finance and Insurance	0
Real Estate and Rental and Leasing	9
Professional, Scientific and Technical Services	0
Management of Companies and Enterprises	0
Administrative and Support, Waste Management and Remediation Services	2
Educational Services	0
Health Care and Social Assistance	0
Arts, Entertainment and Recreation	4
Accommodation and Food Services	20
Other Services (Except Public Administration)	59
Public Administration	0

Figure 6-6. West Sector Fieldwork Photos

(Source: FBM)

Figure 6-7. Vacancies in the West Sector

(Source: FBM)

18 James Boyle Drive West

25 Alicia Scott Avenue

30 Lady Mary Way

6.6 East Sector Profile

Consisting of four clusters, the East Sector is more dispersed than other Sectors in East Hants. The map shown in **Figure 6-8** provides a visual overview of the East Sector's non-residential inventory.

Clusters in this sector are:

- Milford North;
- Milford South;
- Milford Industrial Park;
- Shubenacadie.

Inventory Summary

Each cluster in the East Sector offers a unique mix of businesses. Milford Industrial Park is primarily an industrial cluster, offering a mix of construction, manufacturing, wholesale, and transportation industries. Milford North offers both industrial and retail businesses, ranging from food establishments to wholesale trade industries. Milford South is a relatively small cluster comprising businesses occupied by non-commercial or non-industrial uses.

The total occupied business inventory in the East Sector is estimated at 245,211 sf in over 47 businesses. The inventory is broken down into the following primary uses:

Industrial	***122,596 sf***
Retail (including Auto)	***95,458 sf***
Office	***27,157 sf***

Unlike other clusters, Shubenacadie is primarily a retail cluster, followed by the presence of more traditional office uses. Shubenacadie has larger land utilization, offering a more dense business mix near the intersection of Highways 2 and 215, representative of the area as an older established commercial main street area. Even with a main street concentration, businesses in Shubenacadie are still quite dispersed across the community, with a selection of identified home-based businesses in the western residential neighbourhood.

The prominent industrial areas include Milford Industrial Park which does have several vacant lots, suggesting slower demand but an opportunity for more shovel-ready industrial development. The broader East Sector area is characterized by more agricultural land and farming activities (many of which are not documented in this inventory).

For the most part, existing buildings in the East Sector appear to be almost fully occupied, resulting in a low vacancy rate. Overall, the East Sector has a low vacancy rate of 2.4% which is reasonable since there has not been a significant uptick in new builds requiring absorption. Vacancies are most attributable to older commercial spaces in Shubenacadie.

Representative imagery of some vacancies is shown in **Figure 6-10.** The Milford Industrial Park currently has just over 20 acres of available lots for development as shown in **Figure 6-8**.

In terms of overall land utilization, or the amount of developed building space measured against the land area, the East Sector is estimated at a very low 3.0%. This is misleading however as it is more an indication of the very low utilization in the large land areas in the Milford Industrial Park and Milford North area as seen in **Figure 6-9**. In the case of Shubenacadie, the utilization is much higher, but the total area is a smaller, more compact cluster.

Employment & Business Mix Summary

Referring to **Table 6-7**, the East Sector is home to a total estimated employment base of 309 persons or 12% of East Hants' inventoried employment. The East Sector location is the furthest from the HRM and closer to Colchester County and Truro, where some of its employment is likely sourced.

The estimated employment base is broken down into the following primary uses:

Industrial	***102 persons***
Retail	***144 persons***
Office	***64 persons***

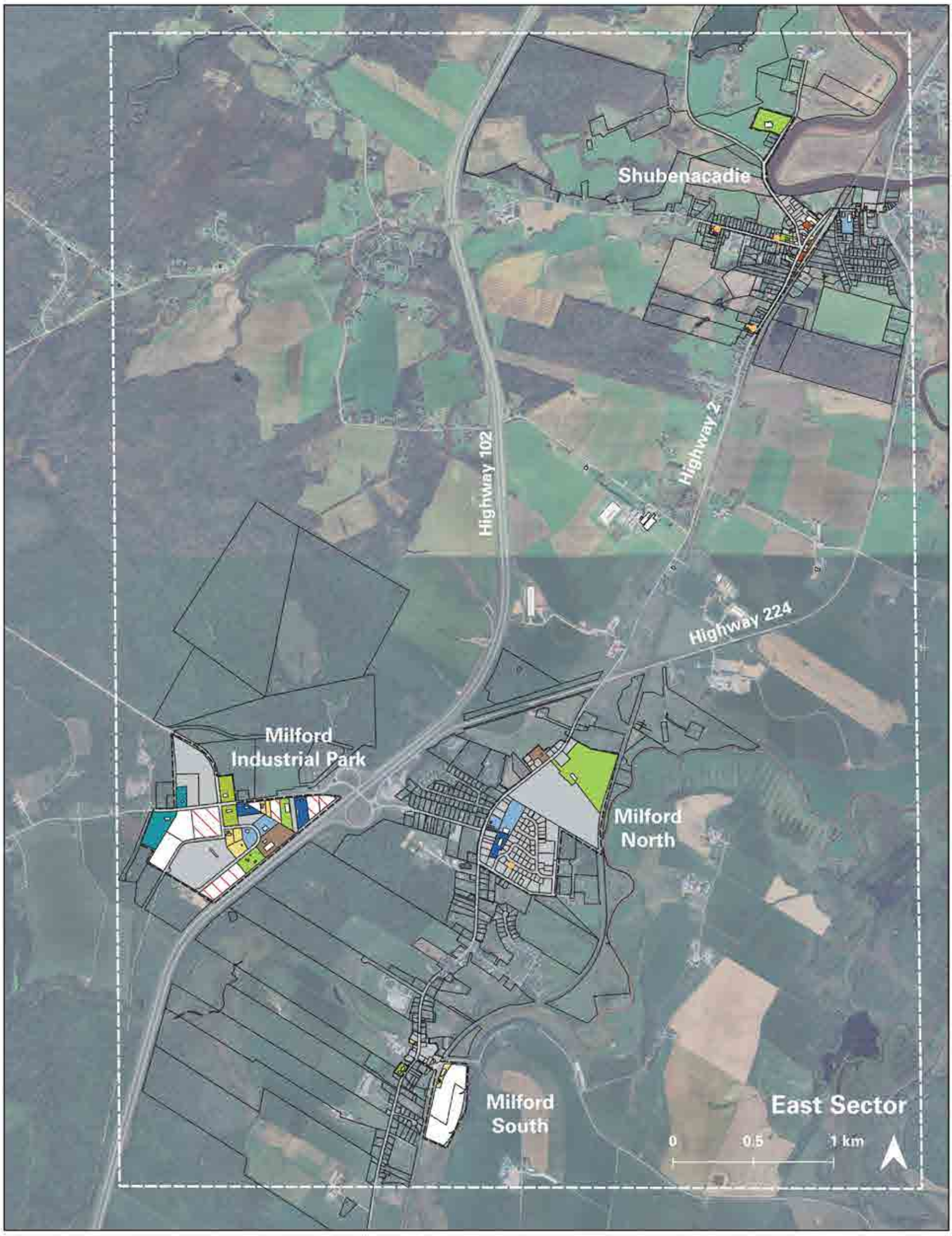
The historic nature of Shubenacadie as well as the slower emergence of Milford as an industrial cluster lends itself to a somewhat balanced employment composition between industrial, retail and office. The somewhat isolated distance from Milford relative to larger population centres, namely Elmsdale/Lantz and Truro is a likely contributing factor to the slower absorption of industrial lands in the Milford area. Land values however, are likely favourable for appropriate longer-term investment.

The Top employment categories by NAICS code include:

Retail Trade	***90 persons***
Manufacturing	***55 persons***
Services (except Public Admin)	***39 persons***
Construction	***22 persons***
Health Care & Social Assistance	***22 persons***

Figure 6-8. East Sector Inventory Locations Map

(Source: FBM)



NAICS Codes

- Agriculture, Forestry, Fishing and Hunting
- Mining, Quarrying, and Oil and Gas Extraction
- Utilities
- Construction
- Manufacturing
- Wholesale Trade
- Retail Trade
- Transportation and Warehousing
- Information and Cultural Industries
- Finance and Insurance
- Real Estate and Rental and Leasing
- Professional, Scientific and Technical Services
- Management of Companies and Enterprises
- Adminsitrative and Support, Waste Management and Remediation Services
- Educational Services
- Health Care and Social Assistance
- Arts, Entertainment and Recreation
- Accommodation and Food Services
- Other Services (Except Public Administration)
- Public Administration
- Other uses (non-commercial / non-industrial)
- Vacant
- Undeveloped
- To be Confirmed
- Cluster Boundary
- Sector Boundary

Table 6-7. East Sector Inventory Summary

(Source: FBM)

	East Sector	Share of Municipal Total
Business Count	47	15%
Home Based Businesses (est)	6	27%
Inventory (sf)	251,147	11%
Employment (persons) - see bottom for industry breakdown	309	12%
Vacant (sf)	5,936	7%
Vacant (%) / *Index to Municipal Average*	2.4% *59%*	
Industrial Inventory (sf)	122,596	9%
Industrial Employment	102	9%
Employment Ratio (sf/emp)	1,208	
Retail Inventory (sf)	95,458	13%
Retail Employment	144	11%
Employment Ratio (sf/emp)	665	
Office Inventory (sf)	27,157	19%
Office Employment	64	18%
Employement Ratio (sf/emp)	426	
Land Utilization / *Index to Municipal Average*	3.0% *59.4%*	

Employment By NAICS Code	East Sector
Agriculture, Forestry, Fishing and Hunting	0
Mining, Quarrying, and Oil and Gas Extraction	0
Utilities	0
Construction	22
Manufacturing	55
Wholesale Trade	18
Retail Trade	90
Transportation and Warehousing	6
Information and Cultural Industries	0
Finance and Insurance	10
Real Estate and Rental and Leasing	1
Professional, Scientific and Technical Services	7
Management of Companies and Enterprises	0
Administrative and Support, Waste Management and Remediation Services	0
Educational Services	0
Health Care and Social Assistance	22
Arts, Entertainment and Recreation	6
Accommodation and Food Services	12
Other Services (Except Public Administration)	39
Public Administration	21

Figure 6-9. East Sector Fieldwork Photos

(Source: FBM)

Figure 6-10. Vacancies in the East Sector

(Source: FBM)

2316 Highway 2

2808 Highway 2

6.7 Kennetcook Profile

Figure 6-12 illustrates the business inventory in the Kennetcook cluster. In this analysis, this cluster is treated as an individual cluster located outside of all three broad sectors.

The community of Kennetcook is a small, yet important local-serving commercial cluster, consisting of predominantly retail businesses. Traditional retail trade businesses are most prominent in this community, particularly day-to-day groceries and convenience retailers. Current business offerings are concentrated along Highway 354.

Inventory Summary

The total occupied business inventory in Kennetcook is 24,217 sf in 10 businesses, premised almost solely on retail commercial, with some supportive office-type services as summarized in **Table 6-8**.

Retail 20,392 sf

Within the Retail Trade and Accommodation & Food Services industries there are an estimated 43 employees largely attributed to Anthony's Grocery and Home Hardware which combined have an estimated 17 employees. While Kennetcook is not a large community, the node is stronger than average in its employment in retail businesses.

Office 3,825 sf

Kennetcook has a small collection of businesses comprising Professional, Financial, Scientific & Technical Service industries with an estimated 12 employees in the identified boundary.

Kennetcook is a centrally-located rural node that plays an important role in providing day-to-day needs and services for a largely rural base in the northern half of East Hants.

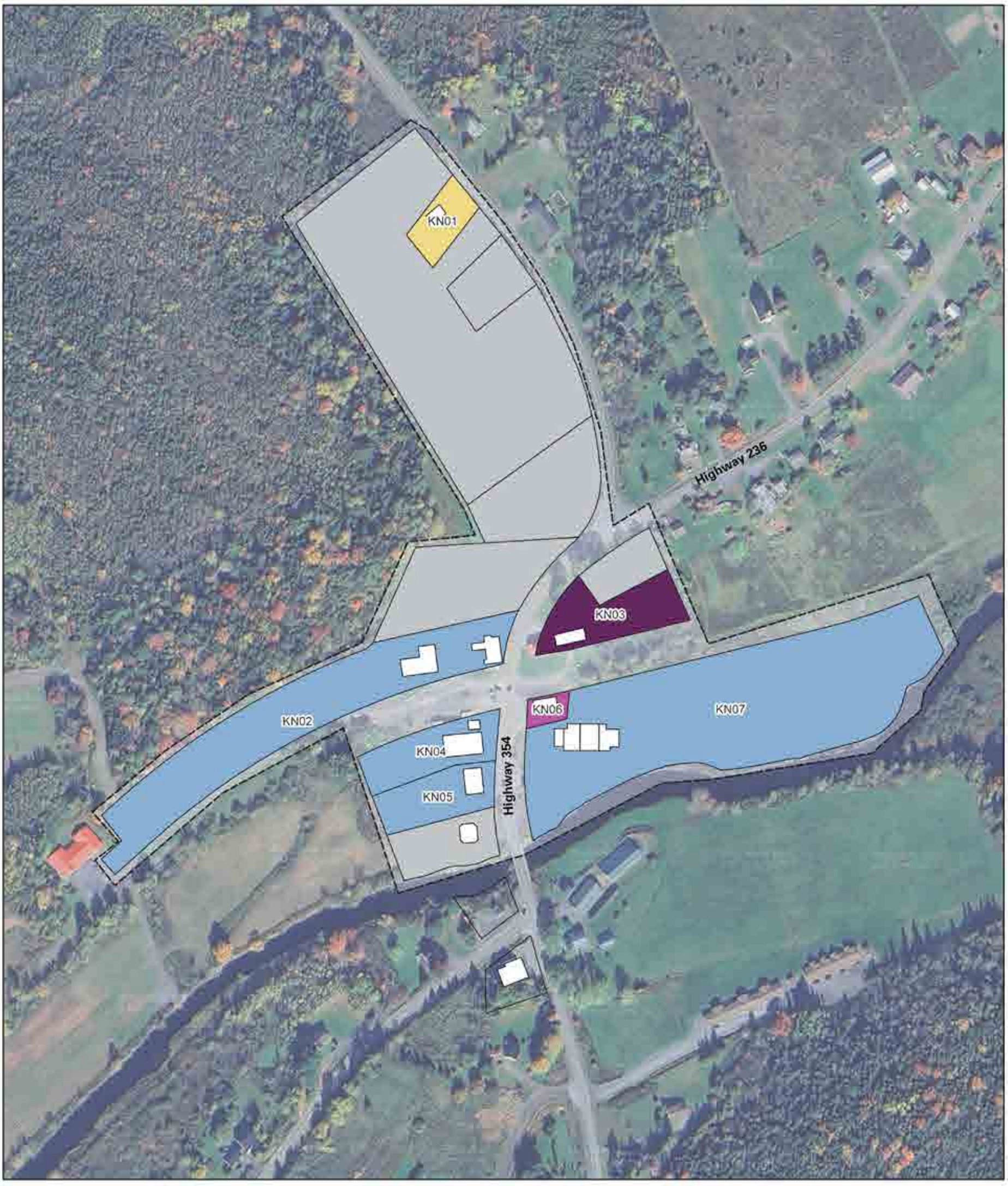
Within the surrounding area there a number of visible home-based businesses that include automotive, transport or construction trades. Many of these have not been captured in this study, but are recognized as present along Nova Scotia Routes 354 and 236.

Figure 6-11. Kennetcook Fieldwork Photos

(Source: FBM)

Figure 6-12. Kennetcook Inventory Locations Map

(Source: FBM)



Kennetcook

0 50 100 m

NAICS Codes

- Agriculture, Forestry, Fishing and Hunting
- Mining, Quarrying, and Oil and Gas Extraction
- Utilities
- Construction
- Manufacturing
- Wholesale Trade
- Retail Trade
- Transportation and Warehousing
- Information and Cultural Industries
- Finance and Insurance
- Real Estate and Rental and Leasing
- Professional, Scientific and Technical Services
- Management of Companies and Enterprises
- Adminsitrative and Support, Waste Management and Remediation Services
- Educational Services
- Health Care and Social Assistance
- Arts, Entertainment and Recreation
- Accommodation and Food Services
- Other Services (Except Public Administration)
- Public Administration
- Other uses (non-commercial / non-industrial)
- Vacant
- Undeveloped
- To be Confirmed
- Home Based Business Location
- Cluster Boundary

Table 6-8. East Sector Inventory Summary

(Source: FBM)

	Kennetcook	Share of Municipal Total
Business Count	10	3%
Home Based Businesses (est)	1	5%
Inventory (sf)	24,217	1%
Employment (persons) - see bottom for industry breakdown	54	2%
Vacant (sf)	0	0%
Vacant (%) / *Index to Municipal Average*	0.0% *0%*	
Industrial Inventory (sf)	0	0%
Industrial Employment	0	0%
Employment Ratio (sf/emp)		
Retail Inventory (sf)	20,392	3%
Retail Employment	43	3%
Employment Ratio (sf/emp)	476	
Office Inventory (sf)	3,825	3%
Office Employment	11	3%
Employment Ratio (sf/emp)	341	
Land Utilization / *Index to Municipal Average*	4.9% *95.2%*	

Employment By NAICS Code	Kennetcook
Agriculture, Forestry, Fishing and Hunting	0
Mining, Quarrying, and Oil and Gas Extraction	0
Utilities	0
Construction	0
Manufacturing	0
Wholesale Trade	0
Retail Trade	38
Transportation and Warehousing	0
Information and Cultural Industries	0
Finance and Insurance	5
Real Estate and Rental and Leasing	0
Professional, Scientific and Technical Services	7
Management of Companies and Enterprises	0
Administrative and Support, Waste Management and Remediation Services	0
Educational Services	0
Health Care and Social Assistance	0
Arts, Entertainment and Recreation	0
Accommodation and Food Services	5
Other Services (Except Public Administration)	0
Public Administration	0

Section 7: Market Demand Analysis

7.0 Market Demand Analysis

7.1 Industrial Demand Forecast to 2035

This section provides an overview of the Industrial market demand reflecting future floorspace and corresponding land needs in East Hants up to the year 2035.

Referring to **Figure 7-1**, four (4) methods were used to forecast the demand for future industrial space in East Hants. These include an examination of: 1) historic annual absorption, 2) employment forecasts by NAICS sector, 3) the forecast of working age population, and 4) estimated space per capita ratio measured against future population growth.

Each of these methods produces its own forecast, but to accurately and realistically ensure sound market-driven forecasts, the methodologies are blended for a weighted average.

Historic Annual Absorption Method

The first method to forecasting entails using historic absorption data for estimating future demand. While no specific local data is available, estimates based on the pace of growth and land sales in East Hants suggest that the average annual absorption has been in the range of 75,000 sf per year.

Employment by NAICS Sector Method

This approach **(detailed in Appendix A)** examines historic employment growth sourced to Statistics Canada forecasted with assumptions based on the economic growth of East Hants and region. In this approach, employment projections were made for specific NAICS industry sectors which were determined by quantifying the estimated amount of floorspace per worker/employee in East Hants and applying this figure to future industrial-related employment growth.

Top Industrial Labour Growth Segments

According to data extrapolated from the past two Federal Census (2016 and 2012), augmented with provincial forecasts for NAICS categories, the following are forecast to exhibit the strongest industrial labour growth in East Hants over the next decade.

1. Construction: 3.7%/yr
2. Wholesale Trade: 3.1%/yr
3. Management of companies and enterprises: 2.8%/yr
4. Transportation and warehousing: 2.2%/yr
5. Manufacturing: 2.2%/yr

The soon-to-open mass timber plant is expected to have a positive impact on the "agriculture, *forestry, fishing and hunting*" NAICS labour classification through supportive downstream value-added industries that may gravitate near the facility.

This approach yielded an industrial demand forecast of approximately 852,450 sf by 2035 for East Hants.

Demand at this level suggests that East Hants should start intensifying and densifying its existing industrial land with more compact forms of industrial development capable of generating higher employment density. This trend would allow for more efficient industrial land use, particularly if new land availability becomes scarce or harder to secure.

In the near term, increased densification will be challenging to achieve, but over a longer period, assuming lands such as that in the Lantz SPS enter the market, the goal of increased intensification could be more realistic.

Labour Force Method

The labour force method **(detailed in Appendix A)** examines future population growth, particularly those in the labour force aged 15+ years.

Figure 7-1. Demand Methodology Inputs (Industrial)

(Source: FBM)

This is important given the young, aspirational demographic and commensurate impact on the workforce. **Appendix A** details this analysis. Unlike office and retail, the labour force for industrial is almost always accommodated in physical form in dedicated and zoned formats and spaces.

Current levels of industrial vacancy and growth suggest that the market is supportive of immediate demand by 2035 for an estimated 294,229 sf using a Labour Force approach.

Per Capita Population Growth Method

A per capita ratio is another reasonable statistical input based that measures East Hants' inventory against its population. Currently, this ratio is estimated to be 49.5 sf per capita. By applying growth at 60 sf per capita against population forecasts, the resulting future demand could be estimated at 277,158 sf by 2035.

Summary Weighted Average

Since market economies can impact factors such as employment or labour, a weighted average of the methodologies was used to accurately sensitize and estimate future demand.

Table 7-1 details the weighted summary of the demand methodologies.

In total there is an estimated demand over the next decade for an estimated 543,459 sf of new industrial floorspace.

Based on a floor-area ratio (FAR) or site coverage of 0.08, reflecting a marginal increase over the current estimate, future development could conservatively require approximately 200 gross acres (including roads) to accommodate additional industrial development in East Hants over the next 10 years.

Not all forecasted demand requires new land since there are still parcels of varying sizes available for development that could absorb some demand. However, in the case of East Hants the amount of available infill industrial land is dwindling and limited. Therefore, it is expected that a large share of demand will require new land to meet forecasts over the next decade, and beyond.

Table 7-1. Weighted Average Industrial Demand Forecast to Year 2035

(Source: Statistics Canada, Manifold Data Mining Inc. & FBM)

Forecast Model	Projected Average Annual Growth	Projected Total Growth over next 10-yrs
Historic Annual Absorption (avg last 5 yrs)	75,000	750,000
Employment Growth Forecast (by industry) (sf)	85,245	852,450
Labour Force Growth (aged >15 yrs) (sf)	29,423	294,229
Per Capita Population Growth (at 60 sf/capita)	27,716	277,158
Blended Average (sf/yr) / Total	**54,346**	**543,459**
Avg Industry Standard Site Coverage Ratio		0.08
Net Land Area Required (acres)		166.3
Gross Land Area Required (acres)		199.6

7.2 Office Demand Forecast to 2035

This section provides an overview of the Office market demand and the projected future development floorspace and corresponding land needs in East Hants up to the year 2035. While this quantification of office demand is distinct from industrial, there are many instances where office demand can be integrated into industrial demand.

Referring to **Figure 7-2**, four (4) methods were used to forecast the demand for office space in East Hants. These include an examination of: 1) historic annual absorption, 2) employment forecasts by NAICS sector, 3) the forecast of working age population, and 4) estimated space per capita ratio measured against future population growth.

Each of the methods produces its own forecast, but to accurately and realistically ensure sound market-driven forecasts, the methodologies are blended for a weighted average.

Historic Annual Absorption Method

The first method to forecasting entails using historic absorption data as a basis for estimating future demand. While no specific market data is available, office demand in East Hants has been historically slow and limited to very localized segments. On this basis, average annual office absorption is estimated to be only in the range of 2,500 sf per year.

Employment by Sector Method

This approach **(detailed in Appendix B)** examines historic employment growth as sourced to Statistics Canada with forecast with assumptions based on the economic growth of East Hants.

In this method, employment projections were made for specific NAICS industry sectors which were determined by quantifying the estimated amount of floorspace per worker/employee in East Hants and applying this figure to future office-related employment growth.

Top Office Labour Growth Segments

According to data extrapolated from the past two Federal Census (2016 and 2012), augmented with provincial forecasts for NAICS categories, the following are forecast to exhibit the strongest office labour growth in East Hants over the next decade.

1. Health care and social assistance: 3.2%/yr
2. Management of companies and enterprises: 2.8%/yr
3. Real Estate Rental and leasing: 2.4%/yr
4. Other Services: 2.1%/yr
5. Public Administration: 2.0%/yr

Professional, scientific and technical services also rank well and are likely to represent a strong component of growth as the corridor expands and diversifies.

This approach yielded an office demand forecast of approximately 69,926 sf by 2035.

Demand at this level would suggest a strategy that looks to include office space in smaller multi-bay flex commercial/light industrial formats in business parks and in retail nodes, as well as possible small infill lots in existing commercially-zoned areas.

Labour Force Method

The labour force method **(detailed in Appendix B)** examines future population growth, particularly those people in the labour force aged 15+ years.

Figure 7-1. Demand Methodology Inputs (Office)

(Source: FBM)

This is important given the growing suburban nature of East Hants and the high likelihood that as commuting pressures increase, businesses may seek out suburban communities for smaller satellite office locations. **Appendix B** details this analysis. Office space is a very nimble and compatible land use with respect to formats and locations, particularly in growing suburban locations. Office can and does often co-exist with retail and/or light industrial development formats at varying sizes.

Current levels of office vacancy and growth suggest that the market would support future demand by 2035 for an estimated 33,573 sf using a Labour Force approach.

Per Capita Population Growth Method

A per capita ratio is another reasonable statistic input that measures East Hant's office inventory against its population. Currently, this ratio is estimated to be only 5.4 sf per capita illustrating the current low office space offering. By applying a forecasted growth at a modest increase to 7.0 sf per capita, the resulting future demand is estimated at 32,335 sf by 2035.

Summary Weighted Average

Since market economies can impact factors such as employment or labour, a weighted average of the methodologies was used to accurately sensitize and estimate future demand.

Table 7-2 details the weighted summary of the demand methodologies.

Based on a floor-area ratio (FAR) or site coverage of 0.5 which would be representative of more suburban forms of office typologies, this could equate to office floorspace demand of approximately 40,209 sf by 2035.

It is highly likely that office space in this lower magnitude will not take place in a traditionally built office development but is more likely to be dispersed across some key areas mixed within retail and industrial nodes in multi-tenant types of buildings. An example might be similar to that which was recently completed in Mount Uniacke at 116 Nova Scotia Trunk 1 and Etter Rd. Over the longer term, and as areas like Elmsdale/Lantz continue to become hotbeds for residential growth, with increased commuting pressures, office demand could become more prominent along the Highway 102 corridor, and may exceed these conservative forecasts.

Table 7-2. Weighted Average Office Demand Forecast to Year 2035

(Source: Statistics Canada, Manifold Data Mining Inc. & FBM)

Forecast Model	Projected Average Annual Growth	Projected Total Growth over next 10-yrs
Historic Annual Absorption (avg last 5 yrs)	2,500	25,000
Employment Growth Forecast (by industry) (sf)	6,993	69,926
Labour Force Growth (aged >15 yrs) (sf)	3,357	33,573
Per Capita Population Growth (at 7 sf/capita)	3,234	32,335
Blended Average (sf/yr) / Total	**4,021**	**40,209**
Avg Industry Standard Site Coverage Ratio		0.30
Net Land Area Required (acres)		3.1
Gross Land Area Required (acres)		3.7

7.3 Retail Demand Forecast to 2035

This section provides an overview of retail demand and the projected future floorspace development and corresponding land needs in East Hants up to the year 2035.

Referring to **Figure 7-3**, five (5) different methods were used to forecast the demand for retail space and land. These include an examination of: 1) trade area retail spending and market share, 2) historic annual absorption, 3) employment forecasts by NAICS sector, 4) the forecast of working age population, and 5) estimated space per capita ratio measured against future population growth.

Each of these methods produces its own forecast, but to accurately and realistically ensure sound market-driven forecasts, the methodologies are blended for a weighted average.

Trade Area Market Share Method

In traditional retail market analyses, a core approach to quantifying demand is using a defined retail trade area that does not adhere to municipal boundaries and quantifies the household retail spending potential and applies a market share or market capture rate against the spending. In the case of East Hants, the majority of retail demand over the next decade and beyond is likely to continue along the Highway 102 corridor between Enfield and Shubenacadie, yet centered around Elmsdale and Lantz. **Appendix C** details the results of this approach which applies the trade area shown previously in **Figure 5-4**.

This approach yielded future retail demand over the next decade to be conservatively just under 256,000 sf. **Appendix C** further provides a reasonable allocation of future demand into respective targeted retail merchandise category/store types that reflects the expected growth in residential as well as future competitive conditions regionally.

The 255,742 sf of category-based market share demand by the year 2035 is summarized as follows:

- Convenience & Day-to-Day Goods/Services estimated to comprise 76,598 sf
- Comparison or Department Store Type Merchandise (DSTM) Goods/Services estimated to comprise 112,116 sf.
- Leisure, Recreation & Entertainment Goods/Services estimated to comprise 35,209 sf
- Automotive Goods (excluding repair) estimated to comprise 31,392 sf.

This level of demand and compatible category/store type composition is premised on continued growth and support within the identified trade area. It is not inconceivable that with continued healthy residential growth, East Hants' Trade Area could become larger and more destination-oriented whereby greater demand could be realized than estimated.

Historic Annual Absorption Method

The second method to forecasting entails using historic absorption data as a basis for estimating future demand. While no specific market data is available, retail absorption in East Hants has been relatively stable over the past decade at an estimated 10,000 sf per year.

However, combining the recent population surge with significant residential development proposals submitted and/or approved, East Hants is at the precipice of a new retail growth phase that suggests future absorption will outpace that of the past decade.

Therefore, average annual absorption is estimated to be in the range of an estimated 20,000 sf per year, equating to 200,000 sf of demand by 2035.

Employment by NAICS Sector Method

This method **(detailed in Appendix C)** examines historic employment growth as sourced to Statistics Canada with forecast assumptions based on the economic growth of East Hants.

Figure 7-1. Demand Methodology Inputs (Retail)

(Source: FBM)

In this approach, employment projections were made for specific NAICS industry sectors which were determined by quantifying the estimated amount of floorspace per worker/employee in East Hants and applying this figure to future retail-related employment growth.

Top Retail Labour Growth Segments

According to data extrapolated from the past two Federal Census (2016 and 2012), augmented with provincial forecasts for NAICS categories, the following are forecast to exhibit the strongest retail labour growth in East Hants over the next decade.

1. Retail Trade: 3.2%/yr
2. Accommodation and food services: 3.1%/yr
3. Other Services: 2.1%/yr
4. Finance and Insurance: 1.5%/yr

Sustained residential growth along the Enfield, Elmsdale and Lantz corridor will support healthy growth in retail and food & beverage labour categories that will also occupy ground floor/street level frontages in the community.

This approach yielded a retail demand forecast of approximately 431,363 sf by 2035.

Demand at this level would suggest that East Hants could be ready to embark on its next stage of growth as a retail location for new-to-market retailers looking to grow their portfolio outside of the increasingly competitive Halifax/Dartmouth locations with new or additional locations.

Labour Force Method

The labour force method **(detailed in Appendix C)** examines future population growth, particularly those people in the labour force aged 15+ years. Retail is a significant employer and provides necessary labour opportunities for youth, new immigrants and in some cases seniors. As East Hants continues to attract young families and new immigrants, retail/retailers will only succeed if there is a strong local labour force. **Appendix C** details this analysis.

The current low levels of retail vacancy suggest the market is supportive of immediate demand by 2035 for an estimated 169,044 sf using a Labour Force approach.

Per Capita Population Growth Method

A per capita ratio is another reasonable statistical input that measures the estimated inventory against the population. Currently, this ratio is estimated to be 27.4 sf per capita, which suggest the community is slightly underserved by its current population base. For a comparable market like East Hants which is on the urban fringe but capable of having a wider draw, this figure should fall in the 30 to 35 sf per capita range. By conservatively forecasting a per capita figure at 30 sf, the resulting future demand could be estimated at 138,579 sf by 2035.

Table 7-3. Weighted Average Retail Demand Forecast to Year 2035

(Source: Statistics Canada, Manifold Data Mining Inc. & FBM)

Forecast Model	Projected Average Annual Growth	Projected Total Growth over next 10-yrs
Retail Trade Area Spending Market Capture (sf)	25,574	255,742
Historic Annual Absorption (avg last 5 yrs)	20,000	200,000
Employment Growth Forecast (by industry) (sf)	43,167	431,673
Labour Force Growth (aged >15 yrs) (sf)	16,904	169,044
Per Capita Population Growth (at 30 sf/capita)	13,858	138,579
Blended Average (sf/yr) / Total	**23,901**	**239,008**
Avg Industry Standard Site Coverage Ratio		0.20
Net Land Area Required (acres)		27.4
Gross Land Area Required (acres)		32.9

Summary Weighted Average

Since market economies can impact factors such as employment or labour, a weighted average of the methodologies was used to accurately estimate future demand.

Table 7-3 details the weighted summary of all demand methodologies.

Based on a floor-area ratio (FAR) or site coverage of 0.2 which would be more consistent with automobile-centric types of retail development formats, the demand could be in the range of an estimated 239,008 sf by 2035.

The 2018 East Hants Retail Market Study (*by Cushing Terrell & Key Planning Strategies*) forecast demand for 2027 to be in the range of 227,700 sf. This figure is likely to be realized by at least half or more of the Kiln Creek retail development at the new Lantz Connector at Exit 8A, which commenced in 2026 (refer to **Figure 7-4**).

Demand forecasts in this study assumes this new market entrant as part of the current supply picture and not forecasted demand.

Consequently demand over the next decade will support further new retail development. Retail demand, for the most part, should continue to focused along the Highway 102 corridor centred around the Elmsdale/Lantz interchanges as well as in or around the Enfield area and appropriate scales.

Figure 7-1. Kiln Creek Concept Plan (exit 8A)
(Source: FBM)

Section 8: Demand Allocation Summary

8.0 Demand Allocation Summary

8.1 Introduction

Using the demand forecasts presented in Section 7, the final step involves allocating future demand across East Hants in a manner consistent with strategic directions and land use planning documents and also respectful of the new growth areas as well as those areas that are likely to either exhibit infill or intensification attributes. While the focus may emphasize certain major nodes for future allocation, other unidentified nodes/areas could accommodate some future demand. Demand, as evidenced in this study, is based only on near term 10-year market demand parameters, but "economic development-driven" demand factors could increase the figures.

8.2 10-year Demand Summary

The total forecasted demand for the year 2035 for East Hants in terms of floorspace is summarized below. These forecasted demand figures may not happen at once, but will likely to be part of pragmatic phased developments, unless dictated by external non-market or speculative factors. Additionally, larger facilities like the mass timber manufacturing facility or large format retailers are more likely to be outliers:

Industrial	*543,459 sf / 211 ac*
Office	*40,209 sf / 5 ac*
Retail	*239,008 sf / 35 ac*
TOTAL	***824,000 sf / 251 ac***

8.3 Allocation by Sector and Sub-Node

Demand allocation is based on the conservative forecasts and figures presented in this study, and does not take into account economic development-driven demand that could increase the estimates, particularly for industrial and retail segments, which could see noticeable increases in the longer-term demand prospects.

The demand allocation estimates also consider backfilling of vacant lots and therefore is not solely premised on new land, but rather efficient land use and planning where consistent with East Hants' *Municipal Planning Strategy* and other guiding growth documents such as the Lantz and Mount Uniacke Secondary Planning Strategies.

East Hants must ensure sufficient land supply beyond 10 years for industrial and commercial needs such as that envisioned in the Lantz SPS.

While "traditional" office demand has been historically slow, the market has proven that office uses can and often do fill spaces in what would normally be considered retail or light industrial spaces.

This trend is expected to gain momentum over the next decade. This "blurring" suggests that while office allocation appears low, some retail and industrial allocation will very likely contain an additional amount of office space, as the community grows and especially as commuting times to the city undoubtedly continue to present challenges.

Table 8-1 provides an allocation breakdown of future 10-year floorspace and land demand,for each broad sector, with a view to the sub-nodes within each.

Central Sector Demand Allocation

(including Elmsdale, Shaw, Lantz and Enfield)

The Central Sector is where an estimated 75% of future industrial, retail and office demand is forecast to be located over the next decade. The breakdown is forecast to be:

Industrial	*358,683 sf / 118 ac*
Office	*36,188 sf / 4 ac*
Retail	*222,277 sf / 33 ac*

Overall, the strategy for East Hants is to dedicate its targeted growth to the Central Sector and its prominent sub-nodes like Elmsdale North where new land is being considered to continue the build-out momentum of the existing Elmsdale Business Park. Similarly, lands around or near the Lantz Connector at Exit 8A should continue to focus on commercial activity, capable of accommodating medium and larger format retailers and other auto-centric commercial nodes.

West Sector Demand Allocation

(including Mt Uniacke)

The West Sector covering the community of Mount Uniacke is forecast to accommodate demand of 18% of future industrial and retail space premised on smaller localized businesses.

Industrial	*141,299 sf / 69 ac*
Office	*n/a / n/a*
Retail	*9,560 sf / 1 ac*

For the West Sector, continuing to attract industrial infill in the Mount Uniacke Business Park should be a priority over the near term, with a broader objective to securing future industrial land inventory near existing industrial/business park activities.

East Sector Demand Allocation

(including Milford & Shubenacadie)

The East Sector covers the communities of Milford and Shubenacadie and is forecast to accommodate demand of 6% of future industrial, retail and office space premised on smaller localized businesses.

Industrial	*38,042 sf / 22 ac*
Office	*4,021 sf / < 1ac*
Retail	*4,780 sf / 1 ac*

In the East Sector, renewed marketing should be pursued to attract industrial tenants for the Milford Industrial Park and its remaining available lots including consideration for industrial greenhouses or other agri-business industries.

Kennetcook Demand Allocation

Kennetcook will continue to serve a very localized community and therefore is only expected to garner 1% of the total forecasted floorsapace demand allocation as summarized below:

Industrial	*5,435 sf / 3 ac*
Office	*n/a / n/a*
Retail	*2,390 sf / < 1 ac*

In the Kennetcook surrounding area there are a number of industrial-related businesses that are located on larger residential properties, which is likely to continue. Consequently, purpose built industrial land is not needed. Similarly, new retail would likely be purpose built in the existing commercial area. If population growth dynamics change in the area, there could be support for more commercial activity, but at present and for the next 10 years, demand allocation for Kennetcook remain conservative and low.

Figure 8-1. 10-Year Demand Forecast Allocation to Year 2035

Total New Demand Allocation by 2035 (sf)		Industrial East Hants Study Area				Retail East Hants Study Area				Office East Hants Study Area			
		% Share of Demand	Share of Demand (sf)	Site Coverage Factor (%)	Net Land Area (acres)	% Share of Demand	Share of Demand (sf)	Site Coverage Factor (%)	Net Land Area (acres)	% Share of Demand	Share of Demand (sf)	Site Coverage Factor (%)	Net Land Area (acres)
West Sector	**Sub-Node**	**26%**	**141,299**	**5%**	**69**	4%	**9,560**	**15%**	**1**	0%	**0**	**n/a**	**0**
Uniacke Business Park Existing Infill		6%	32,608	4%	18.7	0%	0	15%	0.0	0%	0	20%	0.0
Uniacke Business Park New Land		0%	0	4%	0.0	0%	0	15%	0.0	0%	0	20%	0.0
Mount Uniacke Existing Infill		0%	0	4%	0.0	2%	4,780	15%	0.7	0%	0	20%	0.0
Mount Uniacke New Land		20%	108,692	5%	49.9	2%	4,780	15%	0.7	0%	0	20%	0.0
Central Sector	**Sub-Node**	**66%**	**358,683**	**7%**	**118**	**93%**	**222,277**	**16%**	**33**	**90%**	**36,188**	**20%**	**4**
Nine Mile River		0%	0	7%	0.0	0%	0	20%	0.0	0%	0	20%	0.0
Belnan		0%	0	7%	0.0	0%	0	20%	0.0	5%	2,010	20%	0.2
Elmsdale N Existing Infill		6%	32,608	7%	10.7	0%	0	20%	0.0	10%	4,021	20%	0.5
Elmsdale N New Land		60%	326,075	7%	106.9	4%	9,560	15%	1.5	15%	6,031	20%	0.7
Elmsdale E Existing Infill		0%	0	7%	0.0	5%	11,950	20%	1.4	10%	4,021	20%	0.5
Elmsdale W Existing Infill		0%	0	7%	0.0	0%	0	20%	0.0	10%	4,021	20%	0.5
Shaw Existing Infill		0%	0	7%	0.0	5%	11,950	20%	1.4	0%	0	20%	0.0
Lantz Existing Infill		0%	0	7%	0.0	60%	143,405	15%	21.9	20%	8,042	20%	0.9
Lantz New Land (SPS)		0%	0	7%	0.0	15%	35,851	15%	5.5	15%	6,031	20%	0.7
Enfield Existing Infill		0%	0	7%	0.0	4%	9,560	20%	1.1	5%	2,010	20%	0.2
East Sector	**Sub-Node**	**7%**	**38,042**	**4%**	**22**	**2%**	**4,780**	**15%**	**1**	**10%**	**4,021**	**20%**	**0.5**
Milford Industrial Park Existing Infill		7%	38,042	4%	21.8	0%	0	15%	0.0	0%	0	20%	0.0
Milford North Existing Infill		0%	0	4%	0.0	0%	0	15%	0.0	0%	0	20%	0.0
Milford South Existing Infill		0%	0	4%	0.0	0%	0	15%	0.0	0%	0	20%	0.0
Shubenacadie Existing Infill		0%	0	4%	0.0	2%	4,780	15%	0.7	10%	4,021	20%	0.5
Kennetcook	**Sub-Node**	**1%**	**5,435**	**5%**	**2**	**1%**	**2,390**	**15%**	**0.4**	**0%**	**0**	**n/a**	**0**
Kennetcook & Surrounds		1%	5,435	5%	2.5	1%	2,390	15%	0.4	0%	0	20%	0.0
Total		**100%**	**543,459**	**5.9%**	**211**	**100%**	**239,008**	**15.5%**	**35**	**100%**	**40,209**	**20.0%**	**5**

Appendices

Appendix A: Industrial Demand Forecasting Tables

Appendix B: Office Demand Forecasting Tables

Appendix C: Retail Demand Forecasting Tables

Appendix D: Detailed Business Inventory Cluster Maps

Appendix A: Industrial Demand by Employment Category

EMPLOYMENT CATEGORY	Census Year 2016	Census Year 2021	Manifold Data Mining 2025	change per year 16-25	% of Employees in Industrial Related Uses	# of Employees in Industrial Related Uses	Forecasted Growth	Number of Employees in Industrial Related Spaces 2026	2036
Agriculture, forestry, fishing & hunting	370	375	422	1.5%	25%	105	0.70%	106	114
Mining and oil and gas extracton	160	175	184	1.6%	85%	157	0.80%	158	171
Utilities	70	90	88	2.6%	75%	66	2.06%	67	82
Construction	1,380	1,560	1,871	3.4%	100%	1,871	3.67%	1,939	2,781
Manufacturing	900	965	1,152	2.8%	100%	1,152	2.20%	1,177	1,463
Wholesale Trade	420	470	574	3.5%	100%	574	3.08%	591	801
Retail Trade	1,380	1,415	1,680	2.2%	0%	0	3.22%	0	0
Transportation and warehousing	1,040	1,010	1,243	2.0%	100%	1,243	2.24%	1,271	1,586
Information and cultural industries	200	110	121	-5.4%	25%	30	0.53%	31	32
Finance and insurance	325	325	375	1.6%	5%	19	1.50%	19	22
Real estate and rental and leasing	195	155	162	-2.0%	20%	32	2.38%	33	42
Professional, scientific and technical services	630	650	774	2.3%	20%	155	1.86%	158	190
Management of companies and enterprises	0	0	0		0%	0	2.76%	0	0
Administrative and support & waste management	685	590	719	0.5%	50%	359	2.06%	367	450
Educational services	650	700	826	2.7%	5%	41	2.58%	42	55
Health care and social assistance	1,255	1,310	1,588	2.7%	5%	79	3.17%	82	112
Arts, entertainment and recreation	165	145	151	-1.0%	10%	15	2.04%	15	19
Accommodation and food services	750	595	689	-0.9%	5%	34	3.08%	36	48
Other services	570	475	534	-0.7%	30%	160	2.08%	164	201
Public administration	1,025	1,055	1,249	2.2%	30%	375	2.00%	382	466
Total Workforce	12,170	12,170	14,402	2.4%					
Total Industrial-Related Workforce			6,468		45%	6,468	2.6%	6,638	8,634
Estimated Floorspace Ratio per Worker						202		250	250
Total Industrial Related Floorspace (sq.ft)						1,306,115		1,659,518	2,158,565
Annual New Industrial Space Demand (sq.ft)								353,403	56,576
Cumulative New Industrial Space Demand (sq.ft)								**353,403**	**852,450**

Appendix A: Industrial Demand by Labour Force

East Hants Population				
Scenario	**2025**	**2026**	**2027**	**2036**
Medium	26,370	26,760	27,155	30,989

East Hants Labour Force				
Scenario	**2025**	**2026**	**2027**	**2036**
% aged 15+ in labour force	55.5%	55.8%	56.1%	58.6%

East Hants Labour Force				
Scenario	**2025**	**2026**	**2027**	**2036**
Medium	14,637	14,928	15,224	18,171

2025 Industrial Market Conditions East Hants	
Current Industrial Inventory	1,306,115
Current Industrial Square Foot per capita	49.5
Current Industrial Vacancy Rate	6.7%
Occupied Industrial Inventory	1,218,605
Occupied Square Foot per Employable Resident	83.3
"Balanced" Industrial Vacancy Rate	3%
"Balanced" Industrial Occupied Inventory	1,266,932
Absorption Required to Support New Construction	48,326

Projected Cumulative Occupied Industrial Space				
Scenario	**2025**	**2026**	**2027**	**2036**
Medium		1,291,128	1,315,806	1,561,161

Cumulative New Industrial Space Demand				
Scenario	**2025**	**2026**	**2027**	**2036**
Medium		24,197	48,874	294,229

Source: Statistics Canada, Manifold Data Mining Inc., and FBM Ltd.

Appendix B: Office Demand by Employment Category

EMPLOYMENT CATEGORY	Census Year	Census Year	Manifold Data Mining	change per year 16-25	% of Employees in Office Related Uses	# of Employees in Office Related Uses	Forecasted Growth	Number of Employees in Office Related Spaces	
	2016	2021	2025					2026	2036
Agriculture, forestry, fishing & hunting	370	375	422	1.5%	0%	0	0.70%	0	0
Mining and oil and gas extracton	160	175	184	1.6%	0%	0	0.80%	0	0
Utilities	70	90	88	2.6%	5%	4	2.06%	4	5
Construction	1,380	1,560	1,871	3.4%	0%	0	3.67%	0	0
Manufacturing	900	965	1,152	2.8%	0%	0	2.20%	0	0
Wholesale Trade	420	470	574	3.5%	0%	0	3.08%	0	0
Retail Trade	1,380	1,415	1,680	2.2%	5%	84	3.22%	87	119
Transportation and warehousing	1,040	1,010	1,243	2.0%	0%	0	2.24%	0	0
Information and cultural industries	200	110	121	-5.4%	75%	91	0.53%	92	97
Finance and insurance	325	325	375	1.6%	75%	281	1.50%	285	331
Real estate and rental and leasing	195	155	162	-2.0%	75%	122	2.38%	125	158
Professional, scientific and technical services	630	650	774	2.3%	75%	581	1.86%	592	711
Management of companies and enterprises	0	0	0		100%	0	2.76%	0	0
Administrative and support & waste management	685	590	719	0.5%	30%	216	2.06%	220	270
Educational services	650	700	826	2.7%	5%	41	2.58%	42	55
Health care and social assistance	1,255	1,310	1,588	2.7%	5%	79	3.17%	82	112
Arts, entertainment and recreation	165	145	151	-1.0%	10%	15	2.04%	15	19
Accommodation and food services	750	595	689	-0.9%	5%	34	3.08%	36	48
Other services	570	475	534	-0.7%	30%	160	2.08%	164	201
Public administration	1,025	1,055	1,249	2.2%	45%	562	2.00%	573	699
Total Workforce	12,170	12,170	14,402	2.4%					
Total Office-Related Workforce			2,271		16%	2,271	2.0%	2,316	2,824
Estimated Floorspace Ratio per Worker						62		75	75
Total Office Related Floorspace (sq.ft)						141,886		173,720	211,812
Annual New Office Space Demand (sq.ft)								31,834	4,181
Cumulative New Office Space Demand (sq.ft)								**31,834**	**69,926**
Market Share of New Office Space Demand							**100%**	**100%**	**100%**
Share of New Office Space (sq.ft)								**31,834**	**69,926**

Appendix B: Office Demand by Labour Force

East Hants Population				
Scenario	**2025**	**2026**	**2027**	**2036**
Medium	26,370	26,760	27,155	30,989

East Hants Labour Force				
Scenario	**2025**	**2026**	**2027**	**2036**
% aged 15+ in labour force	55.5%	55.8%	56.1%	58.6%

East Hants Labour Force				
Scenario	**2025**	**2026**	**2027**	**2036**
Medium	14,637	14,928	15,224	18,171

2025 Office Market Conditions East Hants	
Current Office Inventory	141,886
Current Office Square Foot per capita	5.4
Current Office Vacancy Rate	2.0%
Occupied Office Inventory	139,048
Occupied Square Foot per Employable Resident	9.5
"Balanced" Office Vacancy Rate	8%
"Balanced" Office Occupied Inventory	130,535
Absorption Required to Support New Construction	-8,513

Projected Cumulative Occupied Office Space				
Scenario	**2025**	**2026**	**2027**	**2036**
Medium		133,296	136,112	164,108

Cumulative New Office Space Demand				
Scenario	**2025**	**2026**	**2027**	**2036**
Medium		2,761	5,577	33,573

Source: Statistics Canada, Manifold Data Mining Inc., and FBM Ltd.

Appendix C: Retail Demand by Employment Category

EMPLOYMENT CATEGORY	Census Year	Census Year	Manifold Data Mining	change per year 16-25	% of Employees in Retail Related Uses	# of Employees in Retail Related Uses	Forecasted Growth	Number of Employees in Retail Related Spaces	
	2016	2021	2025					2026	2036
Agriculture, forestry, fishing & hunting	370	375	422	1.5%	0%	0	0.70%	0	0
Mining and oil and gas extracton	160	175	184	1.6%	0%	0	0.80%	0	0
Utilities	70	90	88	2.6%	0%	0	2.06%	0	0
Construction	1,380	1,560	1,871	3.4%	0%	0	3.67%	0	0
Manufacturing	900	965	1,152	2.8%	0%	0	2.20%	0	0
Wholesale Trade	420	470	574	3.5%	0%	0	3.08%	0	0
Retail Trade	1,380	1,415	1,680	2.2%	95%	1,596	3.22%	1,648	2,262
Transportation and warehousing	1,040	1,010	1,243	2.0%	0%	0	2.24%	0	0
Information and cultural industries	200	110	121	-5.4%	0%	0	0.53%	0	0
Finance and insurance	325	325	375	1.6%	20%	75	1.50%	76	88
Real estate and rental and leasing	195	155	162	-2.0%	5%	8	2.38%	8	11
Professional, scientific and technical services	630	650	774	2.3%	5%	39	1.86%	39	47
Management of companies and enterprises	0	0	0		0%	0	2.76%	0	0
Administrative and support & waste management	685	590	719	0.5%	0%	0	2.06%	0	0
Educational services	650	700	826	2.7%	5%	41	2.58%	42	55
Health care and social assistance	1,255	1,310	1,588	2.7%	0%	0	3.17%	0	0
Arts, entertainment and recreation	165	145	151	-1.0%	10%	15	2.04%	15	19
Accommodation and food services	750	595	689	-0.9%	90%	620	3.08%	640	866
Other services	570	475	534	-0.7%	30%	160	2.08%	164	201
Public administration	1,025	1,055	1,249	2.2%	0%	0	2.00%	0	0
Total Workforce	12,170	12,170	14,402	2.4%					
Total Retail-Related Workforce			2,555		18%	2,555	3.0%	2,632	3,549
Estimated Floorspace Ratio per Worker						282		325	325
Total Retail Related Floorspace (sq.ft)						721,781		855,551	1,153,454
Annual New Retail Space Demand (sq.ft)								133,770	34,032
Cumulative New Retail Space Demand (sq.ft)								**133,770**	**431,673**

Appendix C: Retail Demand by Labour Force

East Hants Population				
Scenario	**2025**	**2026**	**2027**	**2036**
Medium	26,370	26,760	27,155	30,989

East Hants Labour Force				
Scenario	**2025**	**2026**	**2027**	**2036**
% aged 15+ in labour force	55.5%	55.8%	56.1%	58.6%

East Hants Labour Force				
Scenario	**2025**	**2026**	**2027**	**2036**
Medium	14,637	14,928	15,224	18,171

2025 Retail Market Conditions East Hants	
Current Retail Inventory	721,781
Current Retail Square Foot per capita	27.4
Current Retail Vacancy Rate	3.0%
Occupied Retail Inventory	700,128
Occupied Square Foot per Employable Resident	47.8
"Balanced" Retail Vacancy Rate	4%
"Balanced" Retail Occupied Inventory	692,910
Absorption Required to Support New Construction	-7,218

Projected Cumulative Occupied Retail Space				
Scenario	**2025**	**2026**	**2027**	**2036**
Medium		706,812	720,990	861,954

Cumulative New Retail Space Demand				
Scenario	**2025**	**2026**	**2027**	**2036**
Medium		13,902	28,080	169,044

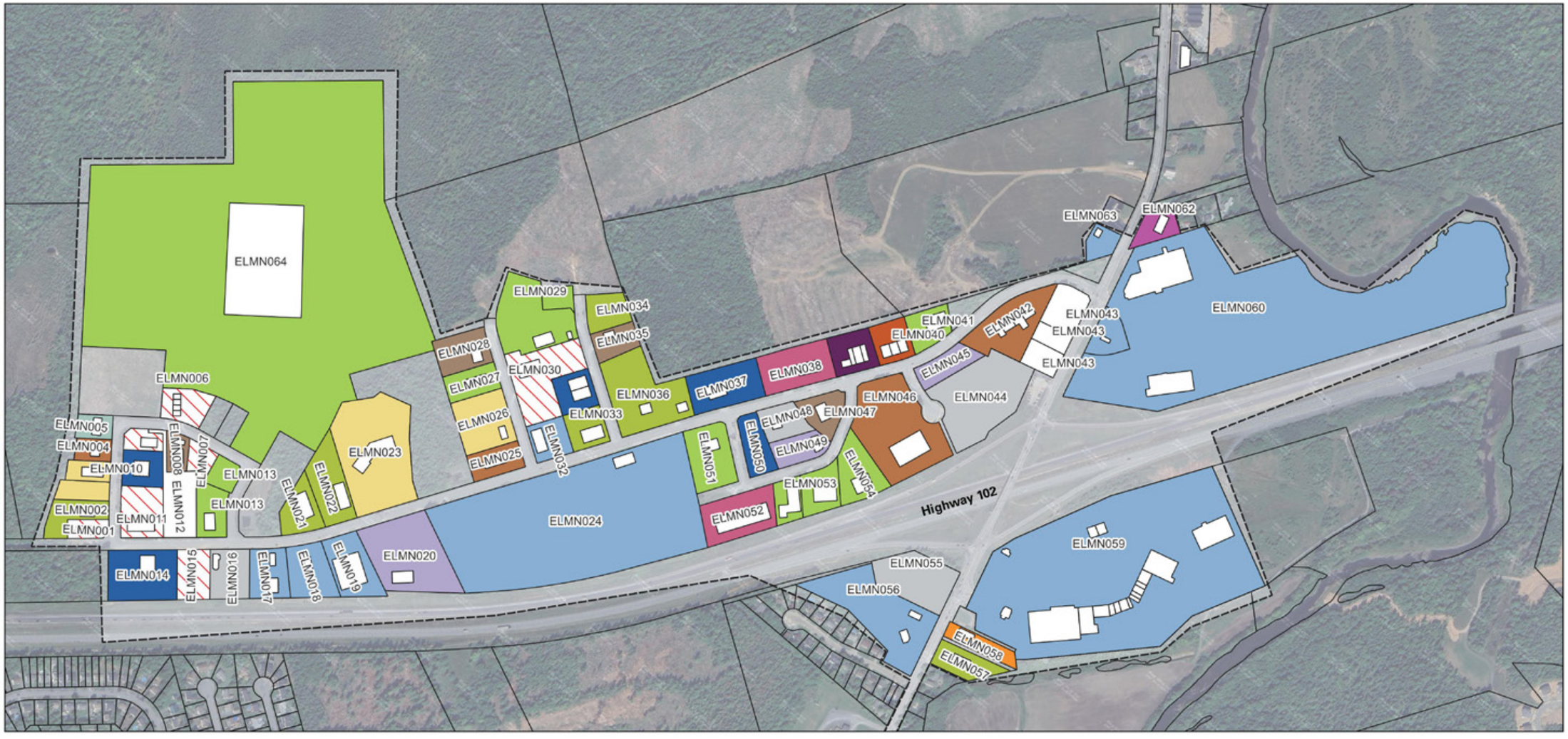
Source: Statistics Canada, Manifold Data Mining Inc., and FBM Ltd.

Appendix C: Retail Demand by Detailed Category Spending & Market Share

Retail Spending by Merchandise Category		2035 ELMSDALE - LANTZ CORRIDOR TRADE AREA Household Retail Spending	2035 ELMSDALE - LANTZ CORRIDOR Aggregate Retail Spending	2035 Estimated Retail Sales Productivity ($ per sq. ft.)	2035 Supportable Trade Area Floorspace (sq. ft.)	2035 Current Estimated ELMSDALE - LANTZ CORRIDOR Market Share of Supportable Floorspace (%)	2035 Estimated ELMSDALE - LANTZ CORRIDOR Future Floorspace (sq. ft.)
Convenience & Day-to-Day Goods/Services	Grocery & Convenience	$10,353	$156,002,145	$603	258,906	21%	54,370
	Pharmacy	$1,003	$15,107,302	$634	23,835	15%	3,575
	Alcohol & Tobacco	$1,621	$24,429,476	$384	63,697	5%	3,185
	Personal Services	$3,271	$49,280,667	$159	309,363	5%	15,468
	Health Care & Medical Services	$748	$11,264,323				0
Comparison or Department Store Type Merchandise (DSTM) Goods/Services	Fashion & Accessories	$2,427	$36,574,301	$252	144,931	10%	14,493
	Jewelry	$177	$2,669,695	$385	6,928	5%	346
	Beauty & Personal Care	$956	$14,398,570	$236	61,110	5%	3,055
	Home Furniture & Décor	$1,062	$16,003,724	$242	66,170	10%	6,617
	Appliances & Electronics	$1,724	$25,977,118	$400	65,010	10%	6,501
	Home Improvement & Gardening	$3,816	$57,504,155	$193	298,037	15%	44,706
	Books & Media	$937	$14,119,985	$173	81,499	5%	4,075
	Sporting Goods	$361	$5,432,232	$253	21,467	20%	4,293
	Toys & Hobbies	$335	$5,051,193	$210	24,090	20%	4,818
	Specialty Retail	$1,447	$21,803,830	$188	116,058	20%	23,212
Leisure, Recreation & Entertainment Goods/Services	Quick Service F&B	$2,159	$32,524,305	$324	100,503	10%	10,050
	Restaurants & Pubs	$2,616	$39,410,529	$264	149,169	10%	14,917
	Arts & Entertainment	$143	$2,162,030	$74	29,237	10%	2,924
	Fitness & Leisure	$399	$6,007,592	$82	73,184	10%	7,318
				$0			
Automotive Goods (excluding repair)	Auto Parts & Accessories	$2,479	$37,346,463	$313	119,445	10%	11,945
	Auto/RV/Motorsports Dealership	$4,519	$68,097,800	$350	194,467	10%	19,447
	TOTAL CATEGORIES	**$42,552**	**$641,167,434**	**$291**	**2,207,108**	**12%**	**255,316**
	TOTAL (excluding Auto)	**$34,806**	**$524,458,848**	**$277**	**1,893,197**	**12%**	**223,925**

Appendix D: Business Inventory Cluster Maps

Central Sector

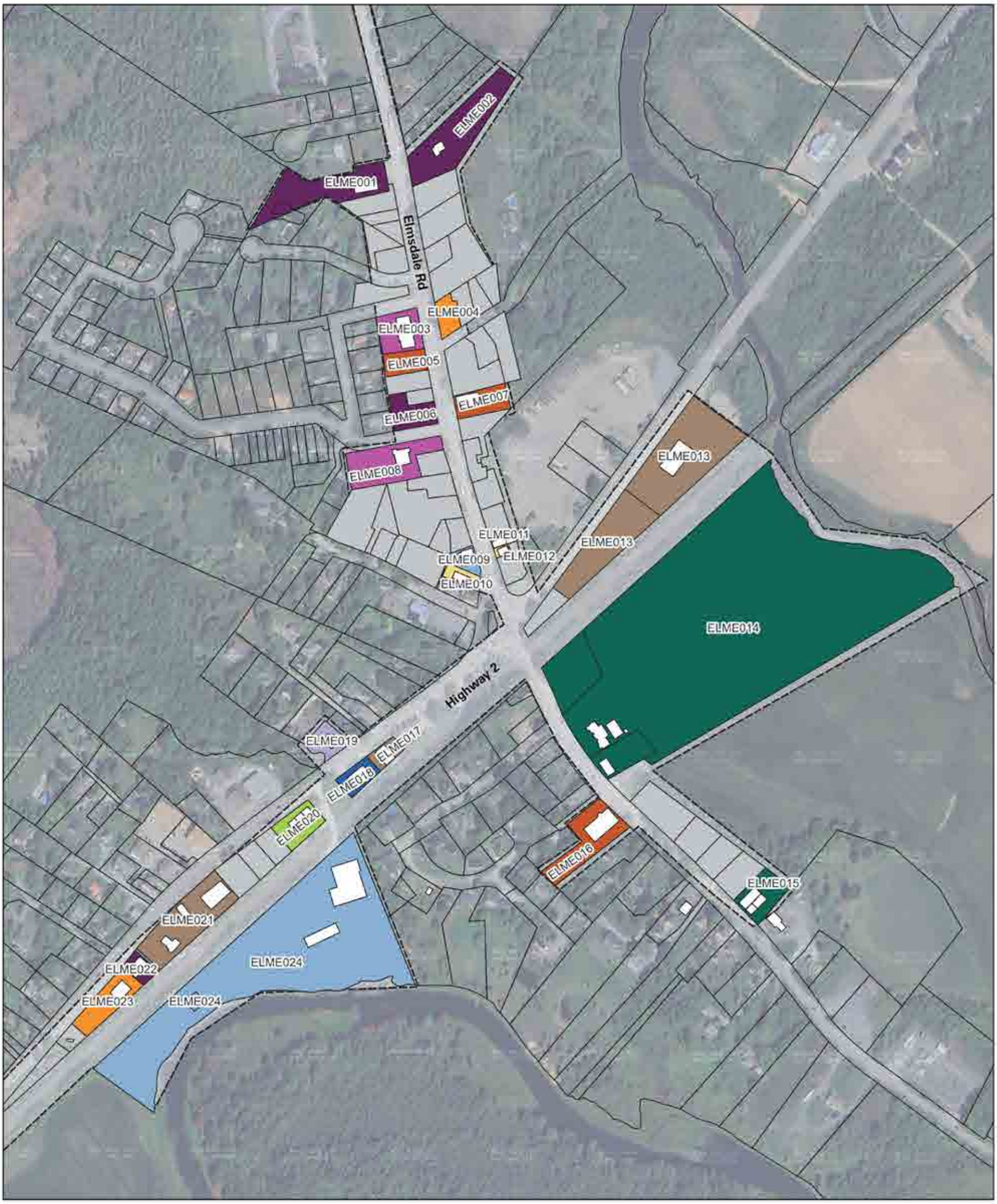


Elmsdale North

0 250 500 m

NAICS Codes

- Agriculture, Forestry, Fishing and Hunting
- Mining, Quarrying, and Oil and Gas Extraction
- Utilities
- Construction
- Manufacturing
- Wholesale Trade
- Retail Trade
- Transportation and Warehousing
- Information and Cultural Industries
- Finance and Insurance
- Real Estate and Rental and Leasing
- Professional, Scientific and Technical Services
- Management of Companies and Enterprises
- Adminsitrative and Support, Waste Management and Remediation Services
- Educational Services
- Health Care and Social Assistance
- Arts, Entertainment and Recreation
- Accommodation and Food Services
- Other Services (Except Public Administration)
- Public Administration
- Other uses (non-commercial / non-industrial)
- Vacant
- Undeveloped
- To be Confirmed
- Home Based Business Location
- Cluster Boundary



Elmsdale East

0 100 200 m

NAICS Codes

- Agriculture, Forestry, Fishing and Hunting
- Mining, Quarrying, and Oil and Gas Extraction
- Utilities
- Construction
- Manufacturing
- Wholesale Trade
- Retail Trade
- Transportation and Warehousing
- Information and Cultural Industries
- Finance and Insurance
- Real Estate and Rental and Leasing
- Professional, Scientific and Technical Services
- Management of Companies and Enterprises
- Adminsitrative and Support, Waste Management and Remediation Services
- Educational Services
- Health Care and Social Assistance
- Arts, Entertainment and Recreation
- Accommodation and Food Services
- Other Services (Except Public Administration)
- Public Administration
- Other uses (non-commercial / non-industrial)
- Vacant
- To be Confirmed
- Home Based Business Location
- Cluster Boundary

Elmsdale West

NAICS Codes

- Agriculture, Forestry, Fishing and Hunting
- Mining, Quarrying, and Oil and Gas Extraction
- Utilities
- Construction
- Manufacturing
- Wholesale Trade
- Retail Trade
- Transportation and Warehousing
- Information and Cultural Industries
- Finance and Insurance
- Real Estate and Rental and Leasing
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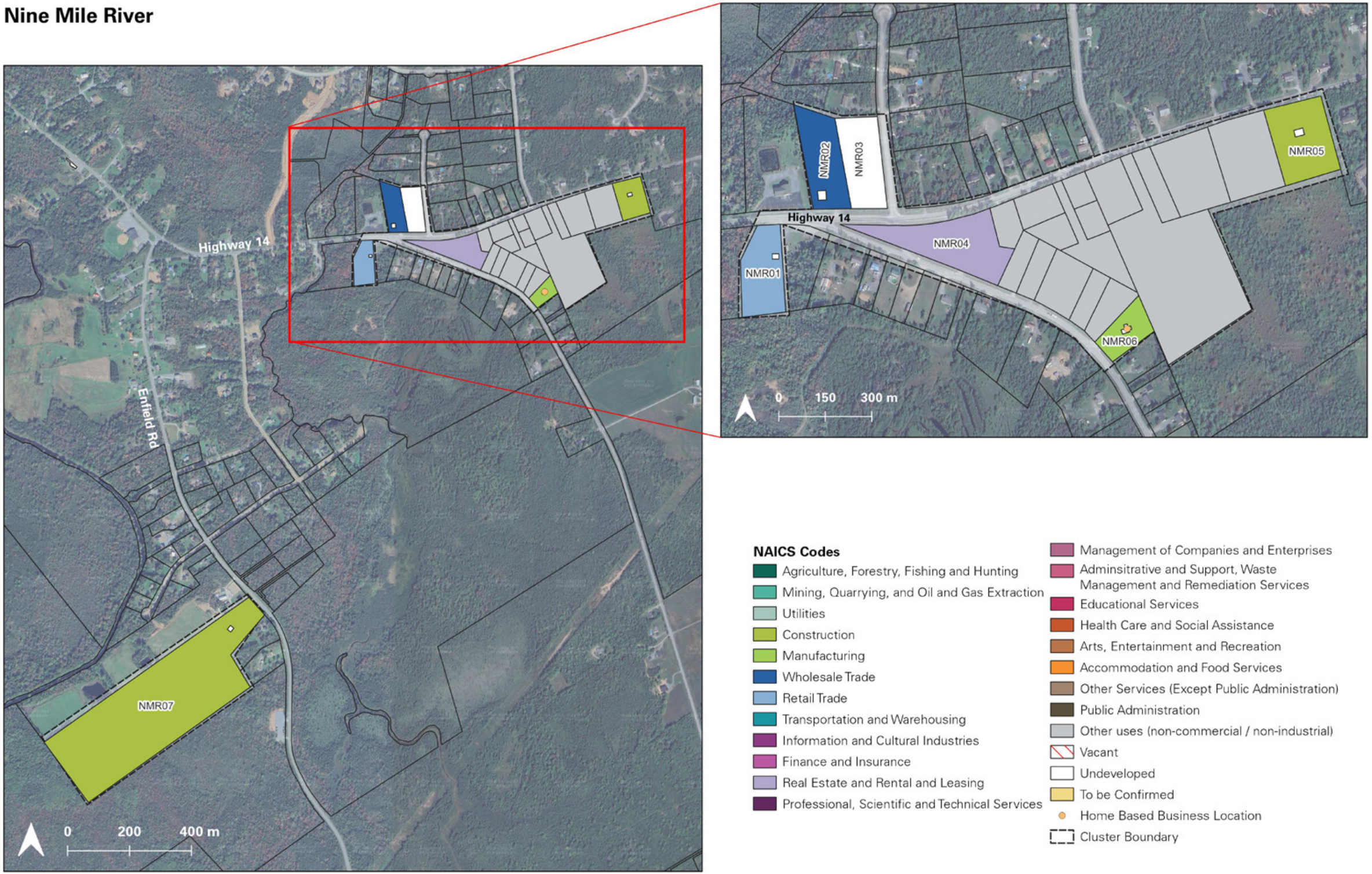
- Accommodation and Food Services
- Other Services (Except Public Administration)
- Public Administration
- Other uses (non-commercial / non-industrial)
- Vacant
- Undeveloped
- To be Confirmed
- Home Based Business Location
- Cluster Boundary

0 100 200 m

Nine Mile River



Belnan

0 100 200 m

NAICS Codes

- Agriculture, Forestry, Fishing and Hunting
- Mining, Quarrying, and Oil and Gas Extraction
- Utilities
- Construction
- Manufacturing
- Wholesale Trade
- Retail Trade
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- Vacant
- Undeveloped
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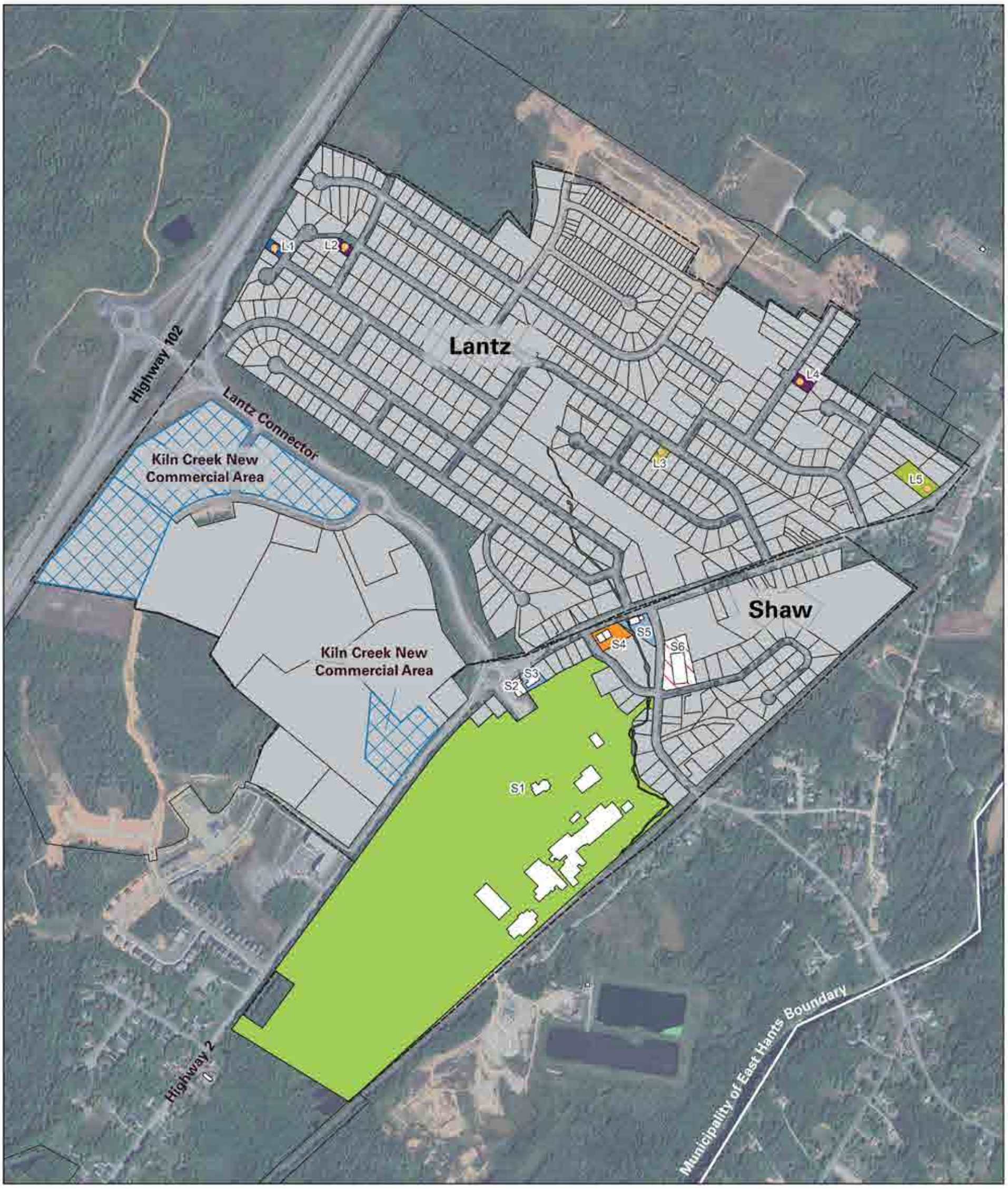
- Home Based Business Location
- Cluster Boundary



Shaw + Lantz

0 100 200 m

NAICS Codes

- Agriculture, Forestry, Fishing and Hunting
- Mining, Quarrying, and Oil and Gas Extraction
- Utilities
- Construction
- Manufacturing
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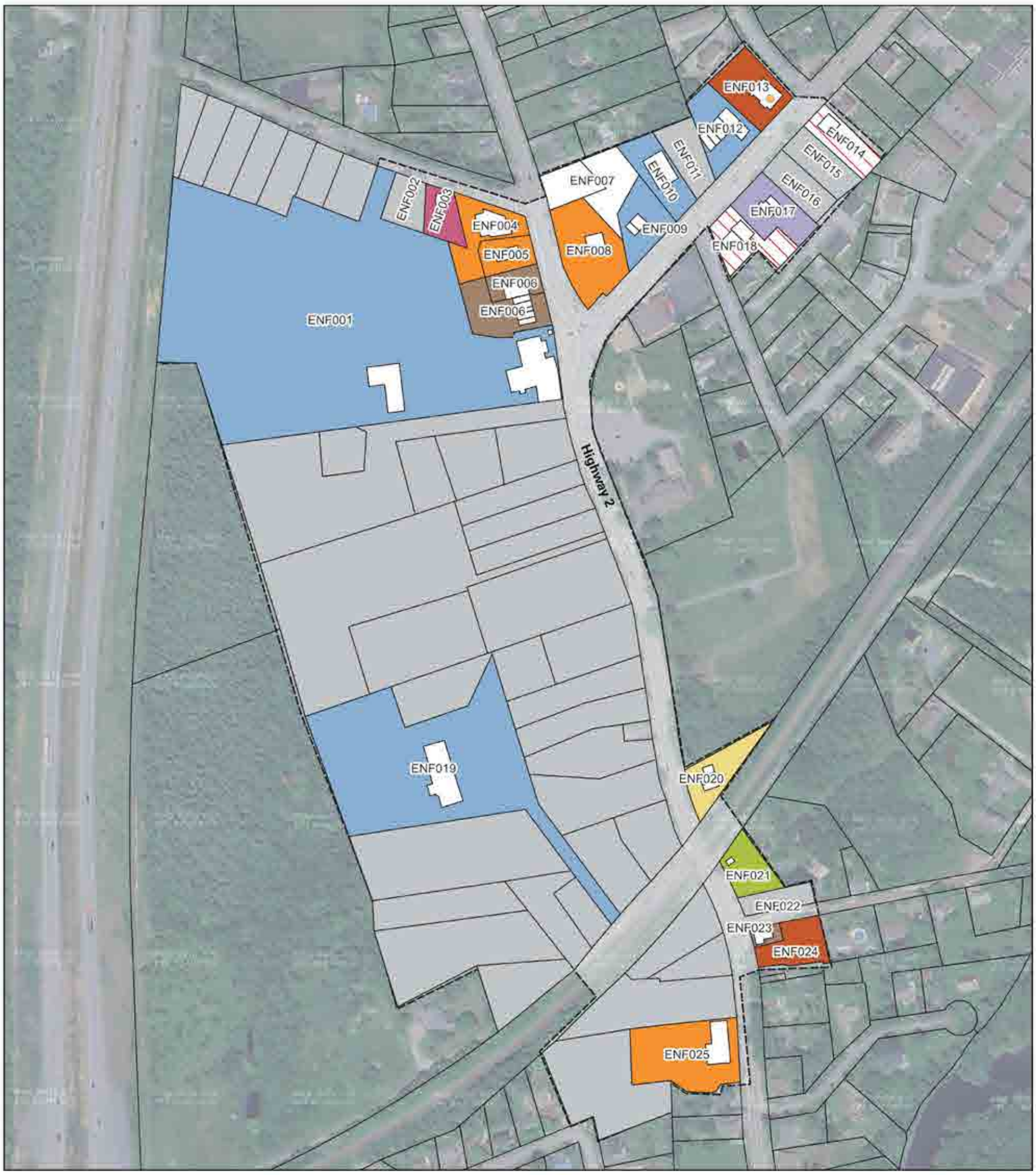
- Other Services (Except Public Administration)
- Public Administration
- Other uses (non-commercial / non-industrial)
- Vacant
- Undeveloped
- To be Confirmed
- Home Based Business Location
- Cluster Boundary
- Kiln Creek New Commercial Area



Enfield

0 75 150 m

NAICS Codes

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- Utilities
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- Cluster Boundary

Uniacke Business Park

0 100 200 m

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- Undeveloped
- To be Confirmed
- Home Based Business Location
- Cluster Boundary

Mount Uniacke

NAICS Codes

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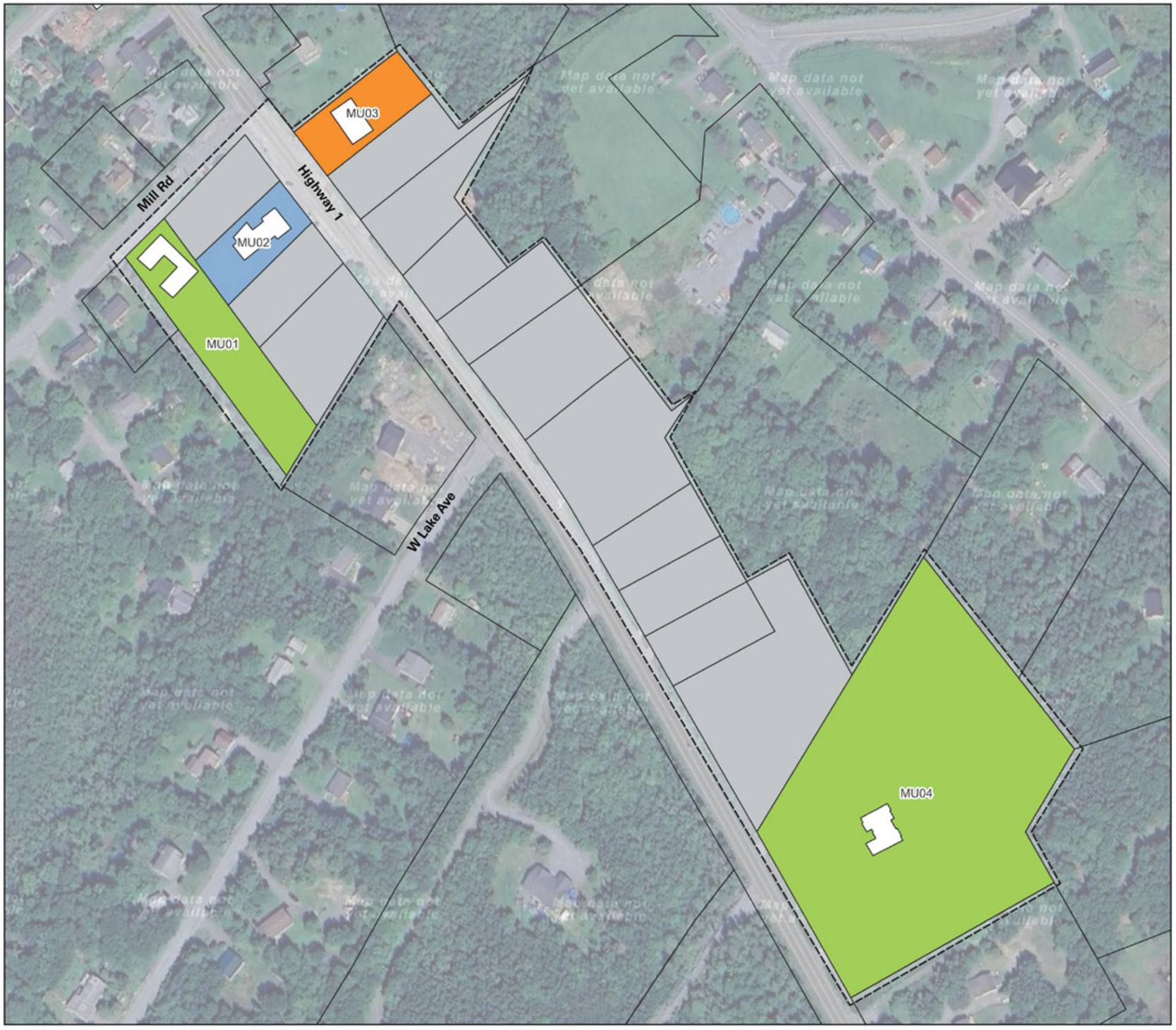
- Other uses (non-commercial / non-industrial)
- Vacant
- Undeveloped
- To be Confirmed
- Home Based Business Location
- Cluster Boundary

0 50 100 m



Milford Industrial Park

NAICS Codes

- Agriculture, Forestry, Fishing and Hunting
- Mining, Quarrying, and Oil and Gas Extraction
- Utilities
- Construction
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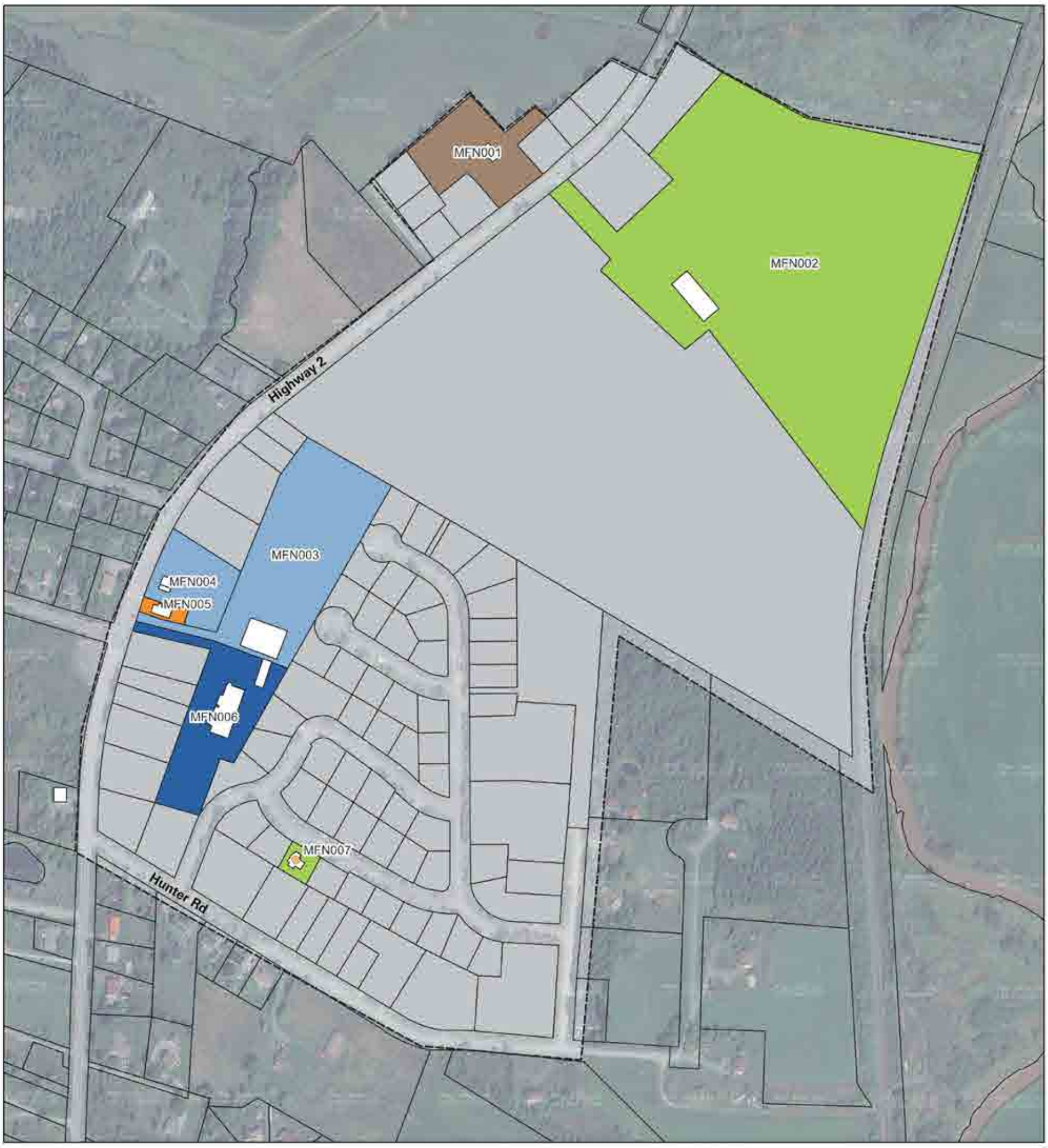

Milford North

0 100 200 m

NAICS Codes

- Agriculture, Forestry, Fishing and Hunting
- Mining, Quarrying, and Oil and Gas Extraction
- Utilities
- Construction
- Manufacturing
- Wholesale Trade
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- Undeveloped
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Milford South

0 50 100 m

NAICS Codes

- Agriculture, Forestry, Fishing and Hunting
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- Vacant
- Undeveloped
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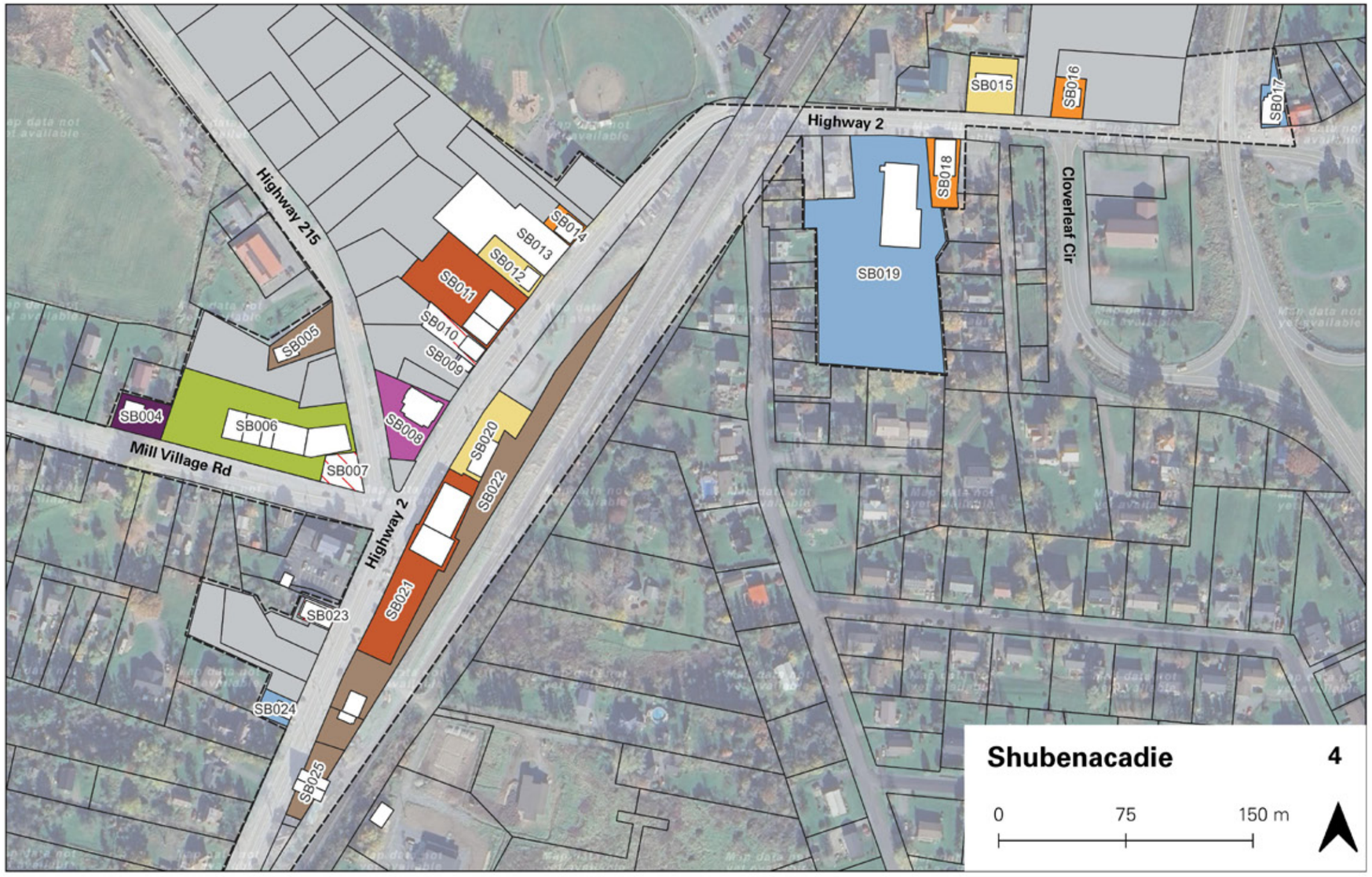
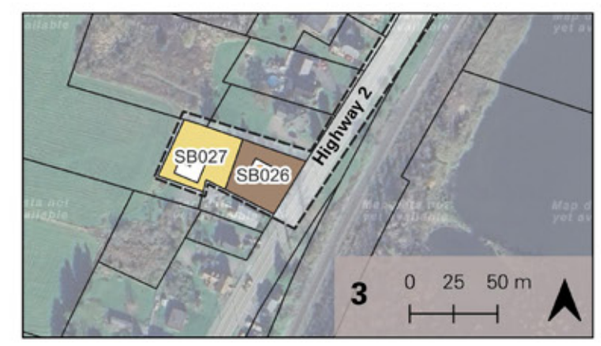
- Home Based Business Location
- Cluster Boundary





NAICS Codes

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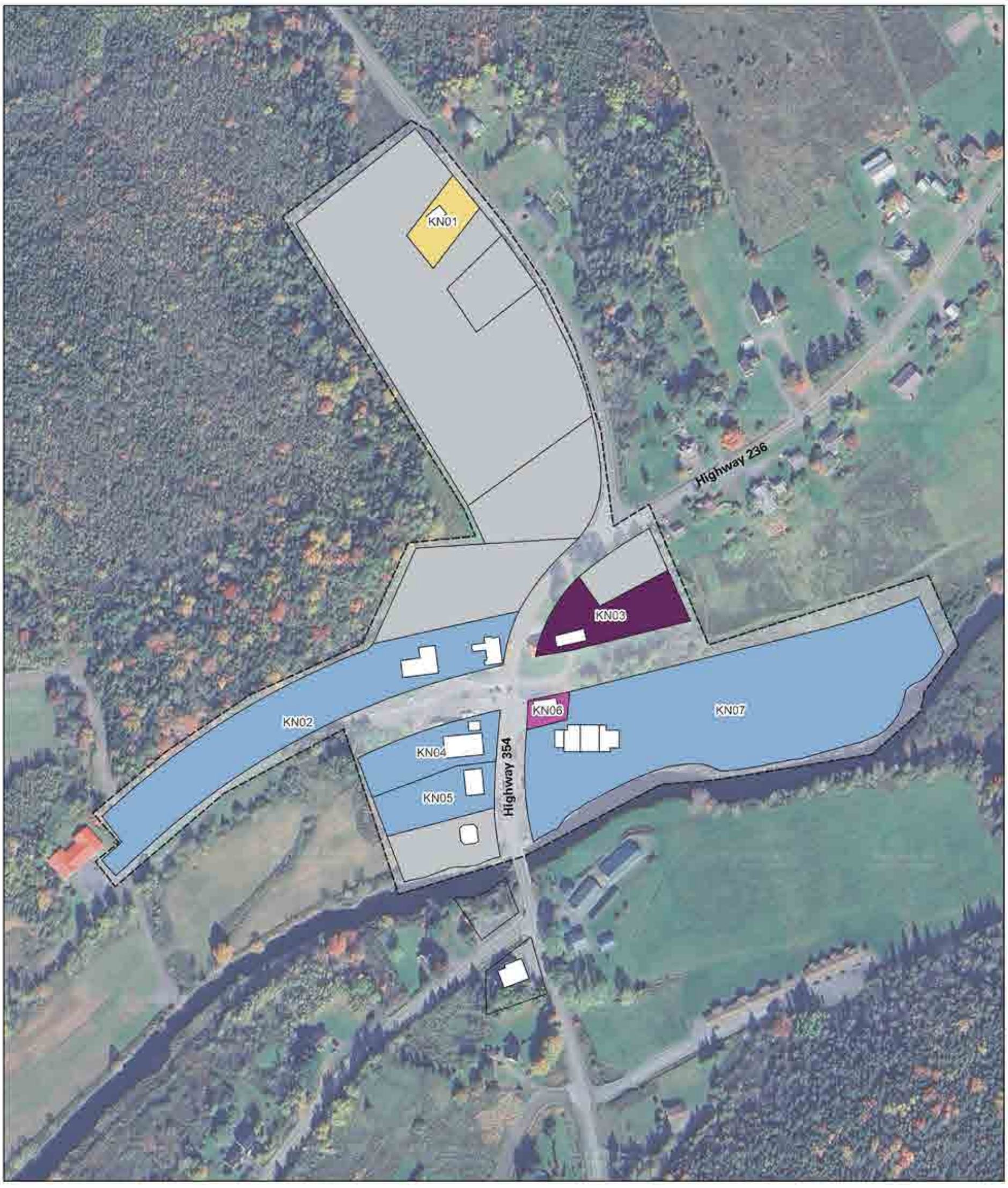

Kennetcook

0 50 100 m

NAICS Codes

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- Undeveloped
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- Home Based Business Location
- Cluster Boundary

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FBM

EAST HANTS