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 LLOYDMINSTER

INDUSTRIAL INVENTORY ANALYSIS

CITY OF LLOYDMINSTER

OCTOBER 2024

Land

Acknowledgment

We acknowledge that the City of Lloydminster is located on Treaty 6 Territory which encompasses the traditional lands of the Métis, Dene Suliné, Cree, Nakota Sioux and Saulteaux peoples. We are all treaty people.

Table of Contents

Preface	i
Executive Summary	i - ii

1.0 Introduction	1
1.1 Scope of Study.....	1
1.2 Report Structure.....	1
1.3 Methodology	1
1.4 North American Industry Classification System (NAICS)	2
1.5 Industrial Density	3

2.0 Regional and Local Context	4
2.1 Introduction	4
2.2 Regional and Local Context	4
2.3 Growth and Development	6
2.4 Relevant Plans and Studies	8
2.5 Transportation	21
2.6 Demographic Snapshot 2024	22

3.0 Trends.....	25
3.1 Introduction.....	25
3.2 Key Industries	25
3.3 Sustainability in Industrial Development	26
3.4 Emerging Trends in Industrial Development	27

4.0 Industrial Profile	29
4.1 Introduction.....	29
4.2 Summary: Total Industrial ALL (City / County / RM).....	29
4.3 Summary: Total Industrial City.....	30
4.4 Summary: Total Industrial (County).....	30
4.5 Summary: Total Industrial (RM)	30
4.6 City North Sector	36
4.7 City West Sector	47
4.8 City East Sector	57
4.9 County West Sector	63
4.10 Rural Municipality (RM) East Sector.....	73

5.0 Stakeholder Outreach.....	77
5.1 Introduction.....	77
5.2 Summary of Stakeholder Engagement Themes	77

6.0 Demand Analysis.....	80
6.1 Introduction.....	80
6.2 Demand Analysis Methodology	80

Appendices.....	84
Appendix A: Stakeholder Outreach.....	84

Table of Tables

Table 1-1	NAICS Classification System	2	Table 6-1.	Industrial Labour Based Forecast.....	82
Table 2-1.	Labour Force Information (2024).....	23	Table 6-2.	Industrial Employment-Based Forecast.....	83
Table 2-2.	Labour Force Industry and Occupation (2024)	24	Table 6-3.	Industrial Demand Forecast Summary by Weighted Average Methodology.....	84
Table 4-1	Typical Industrial Employment Floorspace Ratios.....	29			
Table 4-2	Lloydminster's Industrial Sectors Employment Mix by NAICS Code and Broad Community (City/County/RM)	31			
Table 4-3	City North Sector Industrial Inventory Summary	36			
Table 4-4.	Husky Industrial Park Business Inventory	40			
Table 4-5.	Glenn E. Nelson Industrial Park Business Inventory...	44			
Table 4-6	City West Sector Industrial Inventory Summary	47			
Table 4-7.	Hill Industrial Park NORTH Business Inventory.....	50			
Table 4-8.	Hill Industrial Park SOUTH Business Inventory.....	53			
Table 4-9.	Airport Business Inventory	56			
Table 4-10	City East Sector Industrial Inventory Summary	57			
Table 4-11.	East Business Inventory	60			
Table 4-12.	County West Sector Industrial Inventory Summary....	63			
Table 4-13.	Reinhart Industrial Park Business Inventory.....	67			
Table 4-14.	West Peripheral Business Inventory	67			
Table 4-15.	Reinhart Business Park Business Inventory.....	69			
Table 4-16.	County Energy Park Business Inventory	69			
Table 4-17.	Corridor Business Park Business Inventory	69			
Table 4-18.	Devonia Business Park Business Inventory.....	71			
Table 4-19.	Kam's Industrial Park Business Inventory	71			
Table 4-20.	Rural Municipality East Sector Industrial Inventory Summary	73			
Table 4-21.	Foote Industrial Park Business Inventory	77			
Table 4-22.	Cenovus Energy Business Inventory	77			
Table 4-23.	NE Shadow Area Business Inventory	77			

Table of Figures

Figure 2-1. Approximate Treaty 6 Boundaries	4	Figure 4-1. Lloydminster's Industrial Nodes.....	32
Figure 2-2. Context Map for Lloydminster.....	5	Figure 4-2. Relationship Between the Total Number of Businesses and Total Number of Employees in Lloydminster's Industrial Nodes	33
Figure 2-3. Total Number of All Approved Building Permits in Lloydminster (2019 to 2024).....	6	Figure 4-3. Distribution of Employment By Node.....	34
Figure 2-4. Total Number of Industrial Building Permits (2019 to 2024)	7	Figure 4-4. Distribution of Building Square Footage By Node.....	34
Figure 2-5. Total Construction Value of Industrial Building Permits (2019 to 2024)	7	Figure 4-5. City North Sector Summary Inventory Map.....	38
Figure 2-6. Future Land Use Map from OCP for Lloydminster & RMs	9	Figure 4-6. Husky Industrial Park Node Inventory by NAICS Industry	39
Figure 2-7. City's New City Limits and Annexation Area	10	Figure 4-7. Glenn E. Nelson Industrial Park Node Inventory by NAICS Industry - Part 1.....	41
Figure 2-8. Population Projections 2011 to 2041 from 2013 Growth Strategy	10	Figure 4-8. Glenn E. Nelson Industrial Park Node Inventory by NAICS Industry - Part 2.....	42
Figure 2-9. City of Lloydminster Land Use District, Updated in January 2024.....	12	Figure 4-9. Glenn E. Nelson Industrial Park Node Inventory by NAICS Industry - Part 3.....	43
Figure 2-10. City of Lloydminster Future Land Use, Updated in January 2024.....	13	Figure 4-10. City West Sector Map	48
Figure 2-11. Goals and Objectives for Economic Development	14	Figure 4-11. Hill Industrial Park NORTH Node Inventory by NAICS Industry	49
Figure 2-12. Hill Industrial ASP Future Land Use Concept	15	Figure 4-12. Hill Industrial Park SOUTH Node Inventory by NAICS Industry	52
Figure 2-13. Northeast ASP Future Land Use Concept	16	Figure 4-13. Airport Node Inventory by NAICS Industry	55
Figure 2-14. What do you see as some of the key strengths of operating a business in Lloydminster?.....	17	Figure 4-14. East Sector and Node Inventory by NAICS Industry ..	59
Figure 2-15. What do you see as some of the key challenges of operating a business in Lloydminster?.....	17	Figure 4-15. County West Sector Map	65
Figure 2-16. Recommended Airport Land Use Plan.....	19	Figure 4-16. Reinhart Industrial Park and West Peripheral Node Inventories by NAICS Industry	66
Figure 2-17. Recommended Airport Off-Site Land Use Plan.....	20	Figure 4-17. Reinhart Business Park, County Energy Park and Corridor Business Park Node Inventories by NAICS Industry	68
Figure 2-18. Lloydminster Traffic Count Map.....	21	Figure 4-18. Devonian Business Park and Kam's Industrial Park Node Inventories by NAICS Industry	70
Figure 2-19. Commute Mode of Transport (% of labour force over 15yrs of age).....	22	Figure 4-19. Employment Numbers By Node and by NAICS.....	72
Figure 3-1. Wellness Objectives of Distribution Facilities	26	Figure 4-20. RM East Sector Map	74
Figure 3-2. Key Components of Eco-Industrial Park	27	Figure 4-21. RM East Sector: Foote Industrial and Cenovus Energy Node Inventories by NAICS Industry	75
		Figure 4-22. RM East Sector: NE Shadow Area.....	76
		Figure 5-1. Industrial Inventory Analysis - Stakeholder Input.....	79

Preface

FBM Planning Ltd. ("FBM") in collaboration with Preferred Choice Development Strategies ("Preferred Choice") was commissioned by the Economic Development Department of the City of Lloydminster ("Lloydminster") to prepare an Industrial Inventory Analysis. The study was carried out over the period of January to November 2024 and also included the assistance of Preferred Choice Development Strategists ("Preferred Choice") for stakeholder outreach. Stakeholder meetings and interviews were undertaken between April and July 2024, with on-the-ground fieldwork conducted in January 2024.

The objective of this study is to conduct a thorough and informative industrial inventory for Lloydminster. This study will assist Lloydminster in developing a database for future benchmarking and assessment of market supply and demand for its industrial positioning. Additionally, by identifying gaps in the industrial market, Lloydminster can position itself better to identify investment and business attraction as part of its overall Economic Development Strategy. This study entailed the undertaking of on-site fieldwork and mapping as well as supplemental research of industrial businesses in Lloydminster to gauge their estimated number of employees.

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 securities or participation interest to the public, without the expressed permission of Economic Development; a department within the City of Lloydminster or FBM.

FBM

2024

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Executive Summary

Regional Context

Lloydminster is a dynamic economic hub, recognized for its strengths in heavy oil production and agriculture. Surrounded by some of Canada's most fertile land, the region plays a pivotal role in producing key agricultural products such as canola, barley, and wheat. On the energy front, Lloydminster is home to major operations in crude oil, asphalt, and other petroleum products.

Cenovus Energy, the region's largest employer, has further solidified its presence following the acquisition of Husky Energy, making it the 3rd largest crude oil and natural gas company in Canada². This concentration of industry positions Lloydminster as a strategic location for new technologies, leveraging both its agricultural and energy feedstocks.

While the economy thrives on these core sectors, Lloydminster's retail and commercial activities also play an essential role in stabilizing the local economy, helping to mitigate the impact of fluctuations in the oil and agricultural markets. This diverse economic foundation, combined with opportunities for innovation and sustainable growth, makes Lloydminster a prime location for both established industries and emerging ventures.

Lloydminster is half-way between Edmonton (250km west) and Saskatoon (275km east) and boasts a unique geographic trait among cities in Canada: it is a city located in two provinces. The border running down the city centre became official in 1905 when the Fourth Meridian was chosen to separate Alberta and Saskatchewan¹. Of the 31,582 city residents recorded in the 2021 census, 62.5% live on the Alberta side while 37.5% call the Saskatchewan side home (19,739 and 11,843 respectively)². The County of Vermilion River encompasses the city's western boundary in Alberta and the Rural Municipalities of Britannia and Wilton surround the city to the east in Saskatchewan.

1. Lloydminster Downtown Area Redevelopment Plan, 2020

2. Lloydminster, Census Profile, 2021 Census of Population, Statistics Canada

Summary: Total Industrial ALL (City/County/RM)

The following represents a summary of the City plus surrounding County and RM Total Industrial Area Business Composition, Land Use Mix and Employment Profile:

- Total Gross Land Area: 3,745 acres
- Total Occupied Land Area: 2,741 acres
- Total Building Space (est.): 7,994,046 sq. ft.
- Total Occupied Building Space (est.): 7,409,258 sq. ft.
- Number of Vacant Space: 434,900 sq. ft. / 5.4%
- Average Building Site Coverage: 5.8%
- Vacant or Undeveloped Lots: 599 acres
- Number of Businesses: 422
- Number of Industrial Employees (est): 7,112
- Employee Density per Developed Acre (est): 2.3 employees per acre
- Employee Density per Building Area (est): 1,115 sq. ft. per employee
- Average range of Asking Lease Rates: \$9 to \$15 per sq. ft.

Summary: Total Industrial Lloydminster

The following represents a summary of Lloydminster's Total Industrial Area Business Composition, Land Use Mix and Employment Profile:

- Total Gross Land Area: 2,165 acres
- Total Occupied Land Area: 1,302 acres
- Total Building Space (est.): 5,399,409 sq. ft.
- Total Occupied Building Space (est.): 5,115,786 sq. ft.
- Number of Vacant Space: 283,623 sq. ft. / 5.3%
- Average Building Site Coverage: 79.5%
- Vacant or Undeveloped Lots: 460 acres
- Number of Businesses: 335
- Number of Industrial Employees (est): 5,377
- Employee Density per Developed Acre (est): 4.1 employees per acre
- Employee Density per Building Area (est): 951 sq. ft. per employee

Industrial Demand Summary

Demand forecasting estimates a reasonable forecast for demand over the next decade could approach 500,000 sq. ft. of new industrial floorspace (449,754 sq. ft.) requiring approximately 124 gross acres (50 ha).

This magnitude of demand suggests that given the availability of current parcels of existing and future proposed industrial lands, mostly in Lloydminster that demand for the next decade could reasonably and feasibly be accommodated in potentially serviced and investment-ready lands.

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1.0 Introduction

1.1 Scope of Study

The objective of this study is to assist Lloydminster in developing a database for future benchmarking and assessment of market supply and demand for its industrial positioning.

This Industrial Inventory Analysis is intended to:

- Provide a baseline inventory for Lloydminster's industrial and mixed-industrial real estate.
- Perform an analysis of current and future market demand and opportunities.
- Identify potential industry clusters for potential compatibility.
- Identify industrial development trends and formats that are most compatible with current and target industry clusters as well as market demand.
- Advise advantages of the opportunities presented in industrial and commercial sectors.

By identifying gaps in the commercial and industrial market, Lloydminster can better position itself to identify investment and business attraction in the retail sector as well as those target sectors identified in its Economic Development Strategy.

1.2 Report Structure

This report contains the following sections:

Section 1 – Introduction: Introduces the study process and structure.

Section 2 - Regional and Local Context: Lays out important regional and local context factors including geographic location, regional access, traffic counts, along with a review of relevant plans and studies.

Section 3 - Trends and Best Practices: Provides an overview of industrial trends and best practices shaping consumer, tenant and investor sentiment and actions.

Section 4 - Industrial Profiles: Identifies and defines Lloydminster's industrial sectors and nodes and provides a summary of Lloydminster's total industrial composition, land use mix and employment profile.

Section 6 - Stakeholder Outreach: Summarizes key takeaways from stakeholder interviews.

Section 7 - Demand Analysis: Quantifies future light and heavy industrial demand based on a triangulation of employment growth, historic absorption and per capita estimates along with an estimated fair market share for future growth and land requirements.

Section 8 - Findings and Summary: Identifies key findings and observations of the industrial inventory and industries and provides a timeline of action priorities over a 10-year window for economic development, municipal capital budgeting/operations, and land use planning.

1.3 Methodology

The methodology used to profile Lloydminster's industrial business composition and inventory entailed the following process:

1. Conduct on-the-ground fieldwork and detailed documentation of the businesses and primary industry types within Lloydminster.
2. Using Lloydminster's GIS database, document the parcel sizes of each business. Parcel sizes were modified in select circumstances to better represent the data.
3. Using online aerial mapping as well as GIS information, estimate total building areas on each parcel/lot.
4. Using the North American Industry Classification System (NAICS), identify general Industry Code (2-digit and 3-digit) to which each business is allocated.
5. Based on extensive fieldwork and building assessments, identify the estimated employment density (employees per acre) to estimate the potential number of employees. Where buildings exist on a respective parcel/lot, calculate the estimated employee ratio (employees per building sq. ft.).

6. Using other available public information, document or sensitive detailed business and operations information such as building size, number of employees, and business type, as a verification of research and overall profiling
7. Using Lloydminster's business licensing data, validate industrial business inventory, if and as necessary.
8. Using the NAICS general classification, create a thematic map for each industrial district highlighting visually the business composition of Lloydminster's industrial parks/nodes.
9. Create a master database spreadsheet for each industrial district/node in the City/County/RMs.

1.4 North American Industry Classification System (NAICS)

The North American Industry Classification System (NAICS) is an industry classification system developed by the statistical agencies of Canada, Mexico and the United States. Created against the background of the North American Free Trade Agreement, it is designed to provide common definitions of the industrial structure of the three countries and a common statistical framework to facilitate the analysis of the three economies.

NAICS is a comprehensive system with a hierarchical structure encompassing all economic activities. At the highest level, it divides the economy into 20 sectors. At lower levels, it further distinguishes the different economic activities in which businesses are engaged at a more detailed level.

The criteria used to group establishments in NAICS typically include the primary activity of the business. When NAICS is used this way, the following caveat applies: NAICS has not been specifically designed to take account of the wide range of vertically- or horizontally-integrated activities of large and complex, multi-establishment companies and enterprises.

Hence, there will be a few large and complex companies and enterprises whose activities may be spread over the different sectors of NAICS, in such a way that classifying them to one sector may misrepresent the range of other activities.

Table 1-1 documents the major 2-digit NAICS Industry Codes for Canada, within which a more complex system of up to 6-digit sub-categories (referred to as 'Canadian industries') exist.

For Lloydminster, each of the businesses inventoried have been allocated a 2-digit Industry sector code as well as a 3-digit sub-sector code.

Table 1-1. NAICS Classification System

(Source: [Statistics Canada, 2022](#))

North American Industry Classification System (NAICS) 2022 - Canada	
11	Agriculture, Forestry, Fishing and Hunting
21	Mining, Quarrying, and Oil and Gas Extraction
22	Utilities
23	Construction
31-33	Manufacturing
41	Wholesale Trade
44-45	Retail Trade
48-49	Transportation and Warehousing
51	Information and Cultural Industries
52	Finance and Insurance
53	Real Estate and Rental and Leasing
54	Professional, Scientific and Technical Services
55	Management of Companies and Enterprises
56	Administrative and Support, Waste Management and Remediation Services
61	Educational Services
62	Health Care and Social Assistance
71	Arts, Entertainment and Recreation
72	Accommodation and Food Services
81	Other Services (Except Public Administration)
91	Public Administration

1.5 Industrial Density

The analysis of industrial inventory and business composition will yield strategic information as to current land utilization, but equally as important, directions for future land utilization.

1.5.1 Factors Affecting Intensification

The following outlines some of the factors that affect intensification and employment density. Lloydminster could respond to these factors in the future, if and as land values increase or market-driven development trends shift in the regional marketplace. This is more of a general trend in more urban/suburban markets and thus is not as likely to be a consideration outside of Lloydminster.

That said, Lloydminster may benefit from some of the principles affecting intensification.

Intensification typically occurs as a developer or an individual firm's activity grows while remaining on the same site. Many firms are motivated to remain at a site as long as possible due to:

- Availability of additional space on site;
- High relocation costs;
- Proximity to market or suppliers/familiar location for customers; and
- Closeness to location of employees.

There has also been a tendency for firms relocating to the fringe of urban areas to increase their occupied land relative to their previous location, including 'occupying' more land than immediately required to allow some room for future expansion without relocating again. In effect they are privately banking land for their own future use, with the relatively lower cost of the land making this affordable. Over time, they will intensify this land use again, but in the short term there is a significant increase in land use for each firm that relocates.

1.5.2 Factors Affecting Industrial Employment Densities

There has been a recent trend in more metropolitan and land-scarce markets towards higher developed floor area per employee in many of the industrial sectors. This has been driven by greater capital intensiveness of most industry sectors leading to larger floor area per employee, with technological change underpinning the productivity increases required to maintain competitiveness.

While a key part of Lloydminster's business attraction is the availability of land for both light and general industrial uses, gradual intensification is nonetheless a trend that could become evident over time. This trend is also dependent upon the types of industry and particular industrial user needs, which often include:

- Many industrial districts may have low building Floor Area Ratios (FAR) as users need significant outdoor spaces for loading, parking, and storage.
- Industrial users prefer single level buildings for efficient operations.
- Some businesses are consolidating industrial operations into larger facilities to achieve greater efficiencies which require large sites.
- Major industrial users do not want to be located in inner urban areas, due to congestion and potential land use conflicts, and instead prefer proximity to highways.
- Logistics facilities benefit from synergies of being located near related uses and highway access.
- Some industrial uses have significant negative impacts (such as noise, vibration, smell, traffic, etc.) which can be offensive to surrounding land uses, especially residential.
- Industrial businesses generally do not want to have to interact with other user groups.

2.0 Regional and Local Context

2.1 Introduction

Location factors are an essential foundation to business 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 Lloydminster as they relate to the attraction and retention of industrial businesses.

2.2 Regional and Local Context

Lloydminster is a dynamic economic hub, recognized for its strengths in heavy oil production and agriculture. Surrounded by some of Canada's most fertile land, the region plays a pivotal role in producing key agricultural products such as canola, barley, and wheat. On the energy front, Lloydminster is home to major operations in crude oil, asphalt, and other petroleum products.

Cenovus Energy, the region's largest employer, has further solidified its presence following the acquisition of Husky Energy, making it the 3rd largest crude oil and natural gas company in Canada. This concentration of industry positions Lloydminster as a strategic location for new technologies, leveraging both its agricultural and energy feedstocks.

While the economy thrives on these core sectors, Lloydminster's retail and commercial activities also play an essential role in stabilizing the local economy, helping to mitigate the impact of fluctuations in the oil and agricultural markets. This diverse economic foundation, combined with opportunities for innovation and sustainable growth, makes Lloydminster a prime location for both established industries and emerging ventures.

Lloydminster is half-way between Edmonton (250km west) and Saskatoon (275km east) and, as shown in **Figure 2-2**, boasts a unique geographic trait among cities in Canada: it is a city located in two provinces. The border running down the city centre became official in 1905 when the Fourth Meridian was chosen to separate Alberta and Saskatchewan¹. Of the 31,582 city residents recorded in the 2021 census, 62.5% live on the Alberta side while 37.5% call the Saskatchewan side home (19,739 and 11,843 respectively)². The County of Vermilion River encompasses the city's western boundary in Alberta

and the Rural Municipalities of Britannia and Wilton surround the city to the east in Saskatchewan.

2.2.1 First Nations

Lloydminster is located within Treaty 6 territory which spans across present day Alberta and Saskatchewan (**Figure 2-1**). Seventeen First Nations are part of Treaty 6 which includes the Dene Suliné, Cree, Nakota Sioux and Saulteaux peoples³. North of Lloydminster lie Big Island Lake Cree Nation, Cold Lake First Nations, Frog Lake First Nations, Kehewin Cree Nation, Makwa Sahgaiehan First Nation, Ministikwan Lake Cree Nation and Onion Lake Cree Nation. To the east are Little Pine First Nation, Moosomin First Nation, Poundmaker Cree First Nation, Saulteaux First Nation, Sweetgrass First Nation and Thunderchild First Nation. In addition to the strong First Nations presence in the area, the prairies also form a portion of the traditional Métis Homeland. Lloydminster is a part of Region II of the Métis Nation of Alberta and the Western Region 1A of the Métis Nation of Saskatchewan.

3. Stepping Stones: First Nations Treaties in Alberta Treaty 6, Alberta Teacher's Association, 2017

Figure 2-1. Approximate Treaty 6 Boundaries

(Source: The Alberta Teacher's Association - Education for Reconciliation, Stepping Stones - Treaty 6)

Note: This map shows the approximate area of treaty land as there is no consensus between rights-holders and stakeholders about exact treaty boundaries.

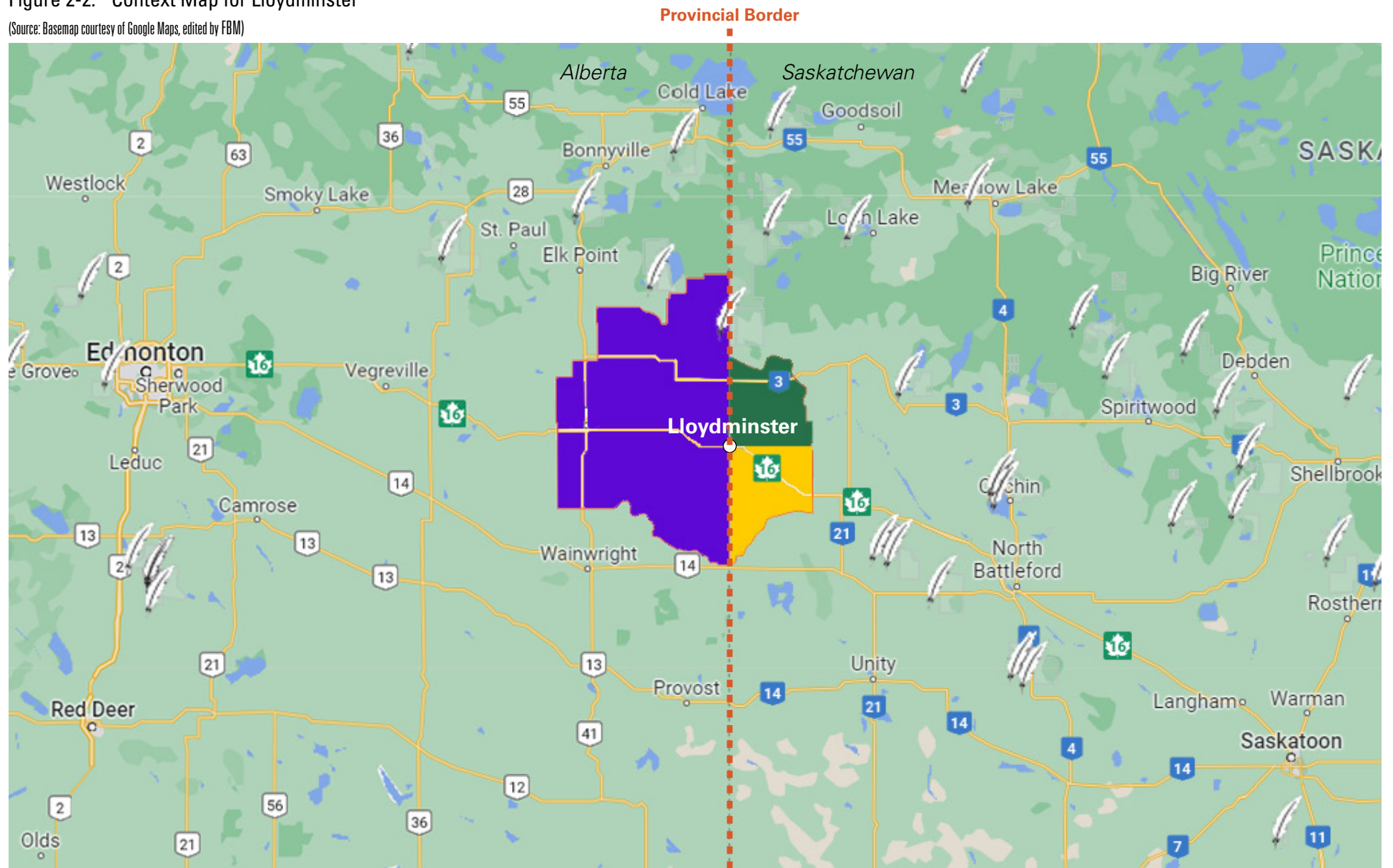


1. Lloydminster Downtown Area Redevelopment Plan, 2020

2. Lloydminster, Census Profile, 2021 Census of Population, Statistics Canada

Figure 2-2. Context Map for Lloydminster

(Source: Basemap courtesy of Google Maps, edited by FBM)



County of Vermilion River, AB

Rural Municipality of Britannia, No. 502

Rural Municipality of Wilton, No. 472

 **First Nations Reserves**

Lloydminster is a signatory of the Heart of Treaty 6 Reconciliation initiative in partnership with the Métis Nation of Alberta, Onion Lake Cree Nation, Poundmaker Cree Nation, Frog Lake Cree Nation, Lloydminster Native Friendship Centre, Lloydminster Chamber of Commerce, Startup Lloydminster, and other community-based organizations. The group prioritizes education and awareness, and healing from the effects of colonization with the intent of strengthening relationships along the path of reconciliation.

From an economic development perspective, Indigenous People contribute significantly to Canada's economy, with the Indigenous economy contributing \$6.74 billion in GDP to Alberta's economy in 2019⁴. Indigenous People represent the fastest growing population segment in Alberta, yet they have lower incomes than other Albertans and fewer than 1% of businesses in the province are Indigenous-owned. This trend presents an opportunity to stimulate Indigenous entrepreneurship and engagement in the labour market thereby supporting the growth of Indigenous-owned businesses.

2.3 Growth and Development

As a border city, Lloydminster has proactively worked to coordinate with the three surrounding entities in Alberta and Saskatchewan when planning for growth and development. For instance, the County of Vermilion River and Lloydminster began working together to create policies and plans in 1982⁵. Recent inter-municipal planning exports to expand the city limits via annexation are profiled in Section 2.4.

Current commercial and industrial development is centered around agriculture, oil, and gas, and located mainly along the intersecting Highway 16 (44th Street) and Highway 17 (50 Avenue)⁶. Businesses have tended to locate on the Alberta side of the city because of more attractive business policies.

2.3.1 Building Permits

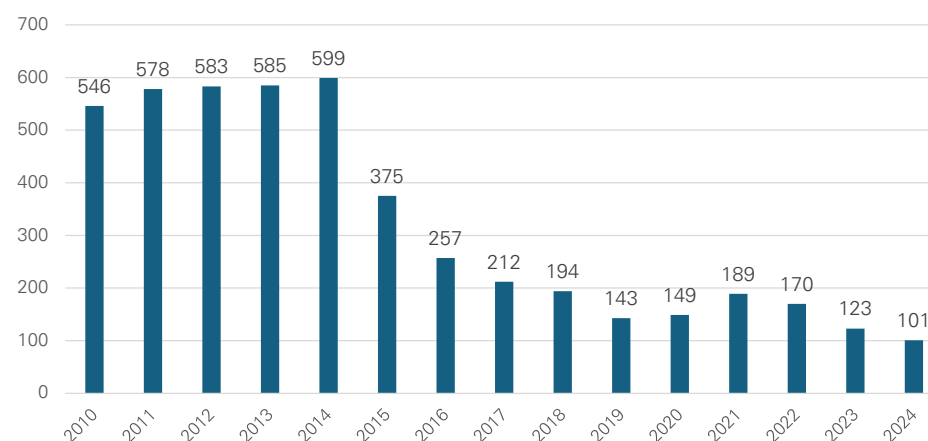
Building permit activity can provide empirical evidence of growth dynamics necessary to support industrial development opportunities.

Figure 2-3 illustrates the historic volume of all building permits in Lloydminster over the past fourteen years, averaging 320 per year over that period, while **Figure 2-4** and **Figure 2-5** show the number and value of **industrial-only** building permits over the past six years.

The number of industrial permits for new construction held steady between 2010-2024, while construction value varied significantly. The Lloydminster industrial market rebounded significantly in 2024 (as of August 31) with 9 significant industrial investments totaling over \$9.1 million. **Notably, improvements in existing buildings accounted for 6 of these permits and \$3.27 million in construction value, while there were 3 new industrial buildings with a value of just under \$6 million (\$5.84 million). This latter statistic represents the highest value over the past 6 years. Most importantly, the recent trends illustrate a renewed confidence in the Lloydminster market. In particular, industrial permit construction value accounts for 30% of the total year-to-date.**

Figure 2-3. Total Number of All Approved Building Permits in Lloydminster (2010 to 2024)

(Source: City of Lloydminster Building Statistics, August 2010 to August 2024 inclusive)



4. Opening the Door to Opportunity: Reporting on the Economic Contribution of Indigenous Peoples in Alberta, ATB & MNP, 2021

5. Lloydminster/Vermilion County Inter-municipal Development Plan, 2008

6. Lloydminster Planning District Official Community Plan, 2014

Figure 2-4. Total Number of Industrial Building Permits (2010 to 2024)

(Source: City of Lloydminster Building Statistics, August 2010 to August 2024 inclusive)

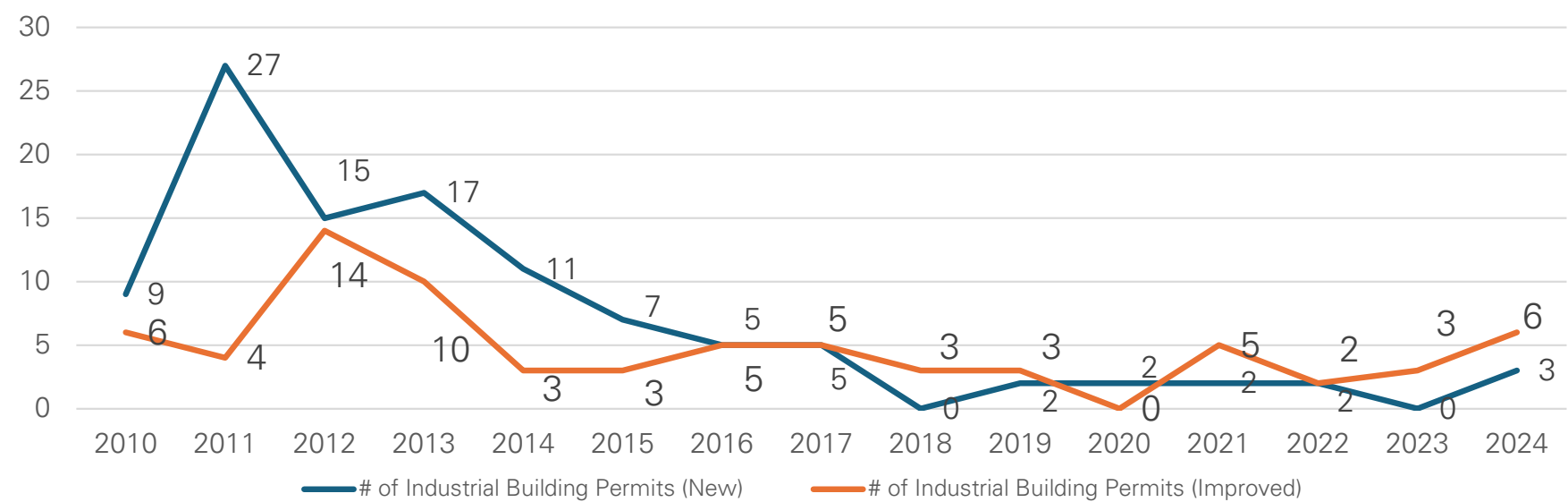
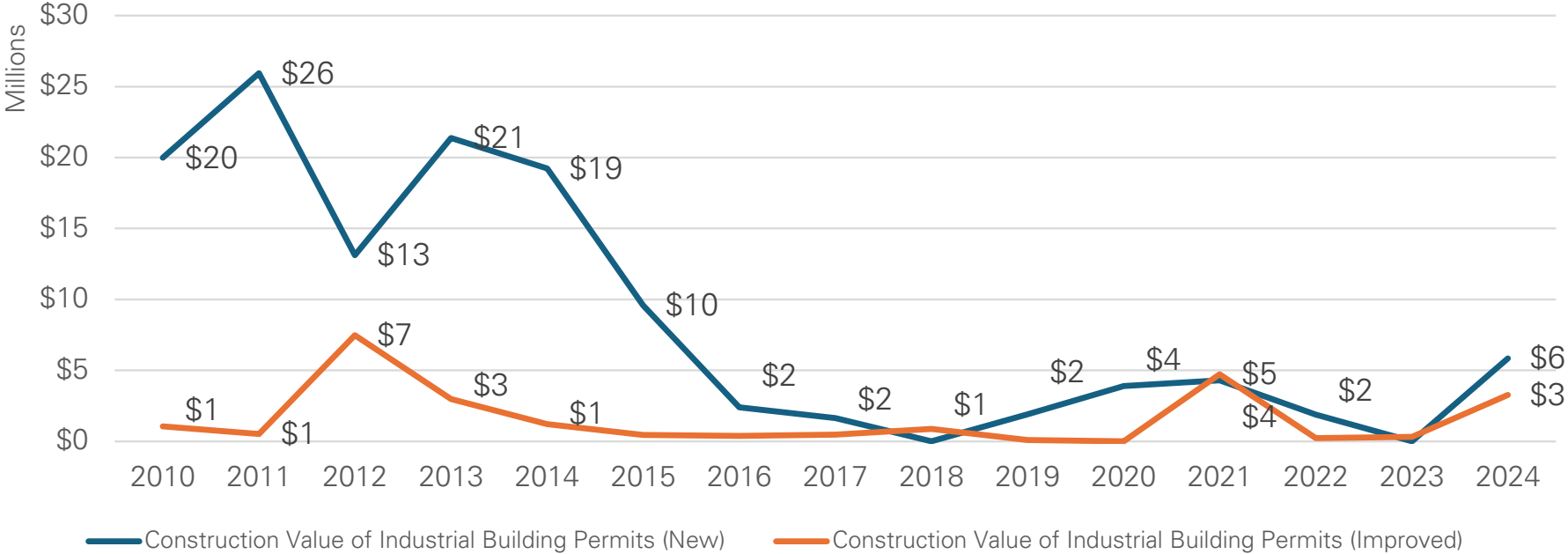


Figure 2-5. Total Construction Value of Industrial Building Permits in Millions of \$ (2010 to 2024)

(Source: City of Lloydminster Building Statistics, August 2010 to August 2024 inclusive)



2.4 Relevant Plans and Studies

Growing the economy and attracting businesses is a clear priority reflected throughout Lloydminster's plans. The following section presents a review of plans and studies which are relevant to the growth and development of Lloydminster's industrial offerings.

2.4.1 Inter-municipal Planning

With the provincial border running through its centre, Lloydminster is governed by a specialized piece of provincial legislation called the Lloydminster Charter which is approved by both provinces¹. Planning matters are governed by the Alberta Municipal Government Act, despite Lloydminster's location in both provinces, with the exception of subdividing and replotting lands in Saskatchewan².

Lloydminster has coordinated with its neighboring county and rural municipalities (RM) using two key plans. Both plans focus on coordinating regional transportation, servicing, and stormwater/wetland management, but also emphasize the importance of growing the regional economy.

The **Inter-municipal Development Plan (IDP) for Lloydminster and Vermilion River County (2008)** aimed to "establish a regional framework for attracting economic opportunities and managing land use, subdivision and development"³ for Lloydminster and the County of Vermilion River. In doing so, the IDP aimed to further enhance the current regional assets and offer a long-term economic base in both urban and rural communities.

The IDP indicated that approximately ten-quarter sections of the Plan Area could be industrial and/or secondary commercial land, which "could theoretically accommodate a 60-year industrial land supply for the entire City"⁴. Additionally, the IDP highlighted industrial opportunities in the community north of Highway 16.

The IDP offered the Future Vision for the Plan area for year 2036, based on the discussions held among the steering committee between

December 2004 and March 2006. The IDP envisioned that in addition to oil and gas industry, the IDP area would also serve as a regional hub for warehousing, and service industries. The IDP also highlighted the importance of continuously upgrading road infrastructure to accommodate heavy loads of traffic, which would also support industrial activities.

Building upon the IDP, the **Joint Regional Growth Study (2019)** aimed to offer "a mutually agreed upon and beneficial growth scenario" between the City and the County.

The Growth Study developed several Growth Principles which aimed to guide urban and rural economic growth:

- Future growth directions will recognize that **agriculture** is an economic driver in the region and minimize conversion of agricultural lands to the lands needed to accommodate future urban growth requirements.
- Lands identified for **future development** should respect local character while supporting sustainable growth, and be planned and developed in a manner that is consistent with best management practices that support environmental features such as wetlands. Environmentally significant and natural areas will also be protected where possible.
- Future residential and employment growth should be in **proximity to existing and planned transportation and utility infrastructure** to maximize these capital investments.
- The **Lloydminster Airport** is a regional asset that benefits both the City and the County. Development opportunities and operational constraints shall be investigated for both the City and the County.

The Study developed growth forecasts, which included population forecasting modeling and employment projections from 2015 to 2045. According to the Medium Growth Scenario, the population of the region is expected to increase from 31,727 in 2015 to 56,390 in 2045, with an average annual growth rate of 1.9%.

1. Draft Annexation Transition Plan, City of Lloydminster, 2022

2. Lloydminster Municipal Development Plan (MDP), 2023

3. Page 3, Lloydminster Inter-municipal Development Plan (IDP), 2008

4. Page 18, Lloydminster IDP, 2008

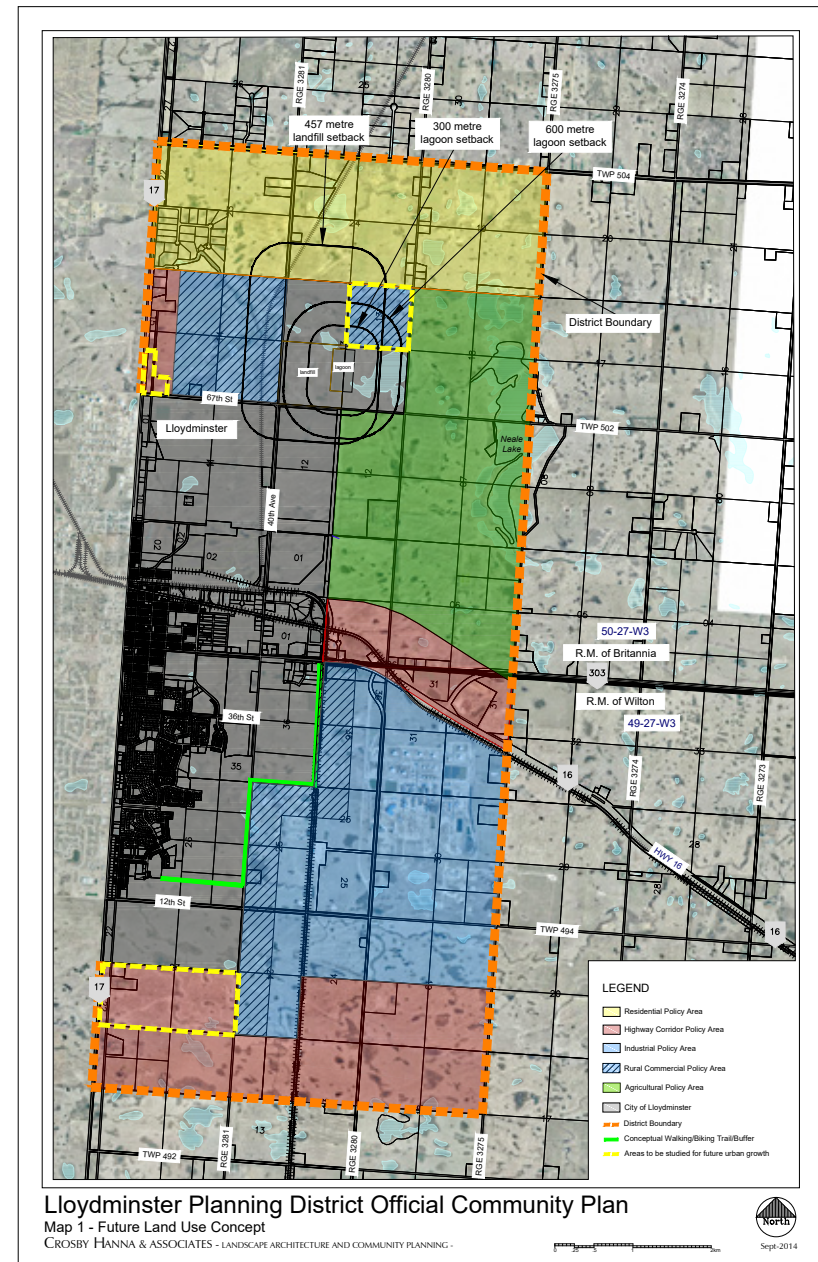
The **Lloydminster Planning District Official Community Plan (OCP) (2014)** focused on the future land use planning for Lloydminster, aiming to offer guidance for physical, social, and economic development. This Plan covers Lloydminster, the Rural Municipality (R.M.) of Britannia and the R.M. of Wilton.

The OCP offered several goals that were to support industrial development opportunities:

- to strengthen the economic base of the member municipalities by creating a positive environment for growth and sustainable business development;
- to identify lands which are suitable for future urban and rural industrial, commercial, residential and other land use categories;
- to identify and protect future growth areas of Lloydminster, the R.M. of Britannia and the R.M. of Wilton.
- to collaborate in regional land use matters such as transportation, storm water and watershed management, utilities, recreation and economic development.

The OCP developed the Future Land Use Concept for the Plan Area, which identified the five priority “Policy Areas”: Agricultural, Residential, Highway Corridor, Rural Commercial, and Industrial (**Figure 2-6**). Agricultural Policy Area is to diversify agriculture-related enterprise, such as agribusiness and agri-tourism. The Highway Corridor Policy Area is intended for service commercial and industrial uses that require large amounts of land but minimal services as well as highway commercial development to meet traveler needs. Rural Commercial Policy area allows “a selective range of commercial and light industrial development in designated areas adjacent to Lloydminster based on the availability of services”⁵. The Industrial Policy Area will also accommodate larger industrial development, and this area will support a wider range of industrial uses.

Figure 2-6. Future Land Use Map from OCP for Lloydminster & RMs
(Source: Lloydminster Planning District Official Community Plan, 2014)



2.4.2 Annexation

Lloydminster undertook an official annexation process to accommodate projected future growth with a particular motivation to create more space for future commercial and industrial development.

As of April 1st, 2022, Lloydminster has officially annexed certain portions of the County of Vermilion River in Alberta via the **Annexation Bylaw**, creating official new city limits as shown in **Figure 2-7**. Those looking to develop on newly annexed land will now follow the regulations for the “Urban Transition (UT) District” in the city’s Land Use Bylaw⁶. The UT District is intended to enable relatively undeveloped agricultural and rural land uses as the area awaits future urban development; some such uses are as-of-right, others discretionary, and examples include farming, public parks, solar collectors, campgrounds, utility services, and industrial storage⁷.

The **2013 Comprehensive Growth Strategy**⁸ significantly informed Lloydminster’s decision to pursue annexation*. The strategy took into account the 30-year land supply needs for Lloydminster. Of the high, medium, and low population scenarios shown in **Figure 2-8**, the Strategy recommended the high scenario for land planning. The Strategy estimated that if the city took no action to acquire new lands, available commercial land would be depleted by 2015 and industrial land by 2018. The City identified a desire to maintain a split of 65% residential and 35% non-residential (commercial and industrial), so as not to increase the tax burden on residents.

The Strategy’s vision for all of the proposed annexation areas (except for those around the airport and landfill) enable commercial development, as summarized below:

- South Annexation Area: residential with neighbourhood commercial and highway-oriented, large format commercial
- West Annexation Area: highway-oriented, large format commercial, plus **industrial** uses
- Northwest Annexation Area: **industrial** development, non-residential
- North Annexation Area: residential with neighbourhood commercial and highway-oriented, service commercial, along with **industrial**.

6. Draft Annexation Transition Plan, City of Lloydminster, 2022

7. Bylaw No. 5-2016, City of Lloydminster

8. City of Lloydminster Final Report: Growth Study, 2013

Figure 2-7. City’s New City Limits and Annexation Area

(Source: City of Lloydminster, Annexation Bylaw)

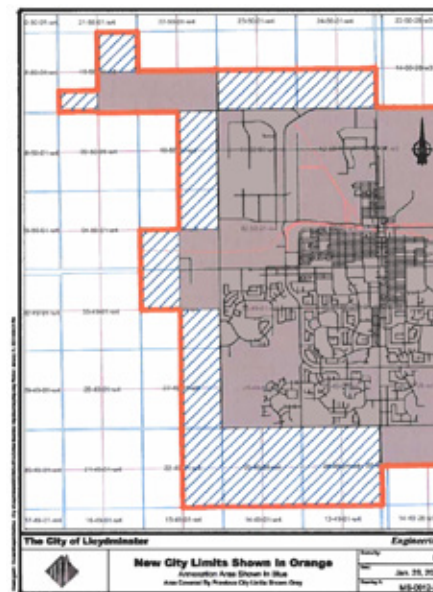
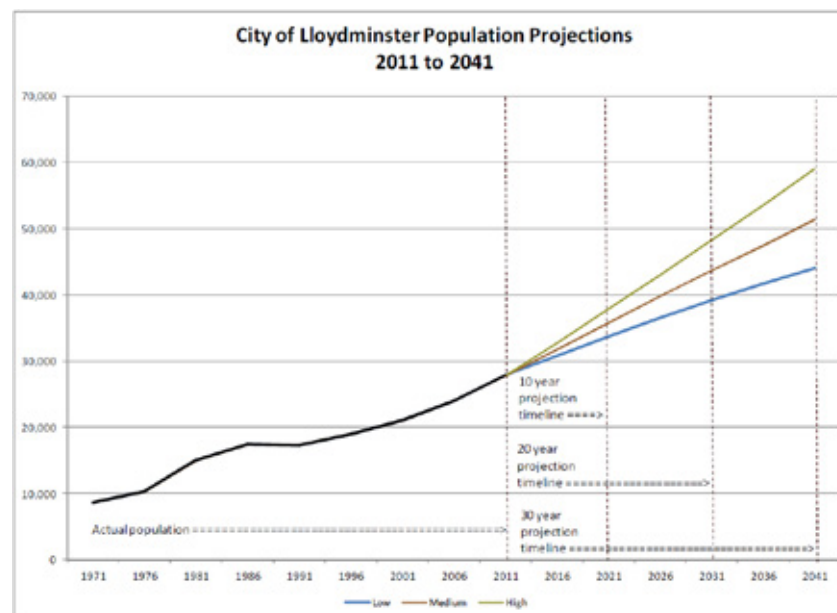


Figure 2-8. Population Projections 2011 to 2041 from 2013 Growth Strategy

(Source: City of Lloydminster Final Report: Growth Study, 2013)



**The city is currently conducting a Comprehensive Growth Strategy Update that will replace the 2013 Strategy and serve in plans and negotiations for future annexation to meet 50-year growth needs⁹.*

2.4.3 Municipal Development Plan and Land Use Bylaw

Titled as “Connection to Our Future”, Lloydminster’s **Municipal Development Plan** (MDP, 2023) aimed to offer guidance and direction for community development while aligning with the needs of residents, workers, and businesses.

The core principle of the MDP was the “value-based approach,” which the Plan described as a more future-oriented approach compared to the “population-based approach.” By focusing and reflecting on community values, the MDP aimed to offer a long-term, consistent planning framework for Lloydminster.

The MDP developed its values based on a series of engagements with community stakeholders between May and June 2022. The City sought to gain input from various community representatives, including (but not limited to) Indigenous communities, newcomers, business communities, and local developers.

The MDP identified “innovation” as one of the core values of the Plan, aiming to encourage economic diversification and community prosperity. In relation to the following five community drivers*, the MDP offered “intended outcomes” for the future of Lloydminster (2.4.1):

- **Urban Form:** the built environment should incorporate innovative design interventions to create value for the community.
- **Mobility and Connectivity:** offer “technologically advanced movement systems and networks” to enhance mobility opportunities for the community.
- **Resilience to the Climate:** encourage the use of affordable and alternative technologies as part of developing a diverse and environmentally responsible economy.
- **Social Equity:** the population should have equitable opportunities to pursue economic prosperity.
- **Fiscal Responsibility:** Lloydminster should deliver services efficiently to both residents and businesses.

**Note: “community drivers” were defined as “the physical and non-physical that directly informs how a city looks, feels, and functions” (Section 2.3).*

The MDP highlighted that communities along transportation corridors (75 Avenue, 40 Avenue, 67 Street, and Highway 17/50) could provide opportunities for industrial and commercial mixed-use developments. For this area, the MDP called for ensuring safety for pedestrians and cyclists while also enhancing the built environment and the landscaping appearance. These corridors were intended to act as “buffers” from medium and heavy industrial nodes including Hill Industrial Park and the northeast quadrant of Lloydminster’s boundary.

As for future directions, the MDP called for clustering industrial developments to “encourage partnerships and efficiencies between industrial park tenants” (4.4.8). The Plan also highlighted the importance of maintaining vacant and serviced industrial parcels of various lot sizes and types to accommodate for a variety of needs for businesses and industries. **Figure 2-9** shows current land uses while **Figure 2-10** shows future land use.

2.4.4 Municipal Plans and Studies

2022-2025 Strategic Plan built upon the previous four-year Strategic Plan initiated in 2017. The Plan identified four key priorities for Lloydminster:

- **Deliver Good Governance:** the Council aimed to sustain the quality of municipal services by retaining quality staff and making informed investment decisions for Lloydminster.
- **Build Economic Resilience:** the Plan’s goal included promoting Lloydminster as a destination for investment. The Council aimed to work closely with existing and new business stakeholders to identify the current market opportunities and barriers.
- **Manage our Environment and Infrastructure:** the Plan highlighted the importance of offering reliable access to roadways and public facilities.
- **Provide a Safe Community:** the Plan emphasized that enhancing safety and inclusivity of the community could contribute toward improving “the flow of key information and resources between community stakeholders” (p. 5).

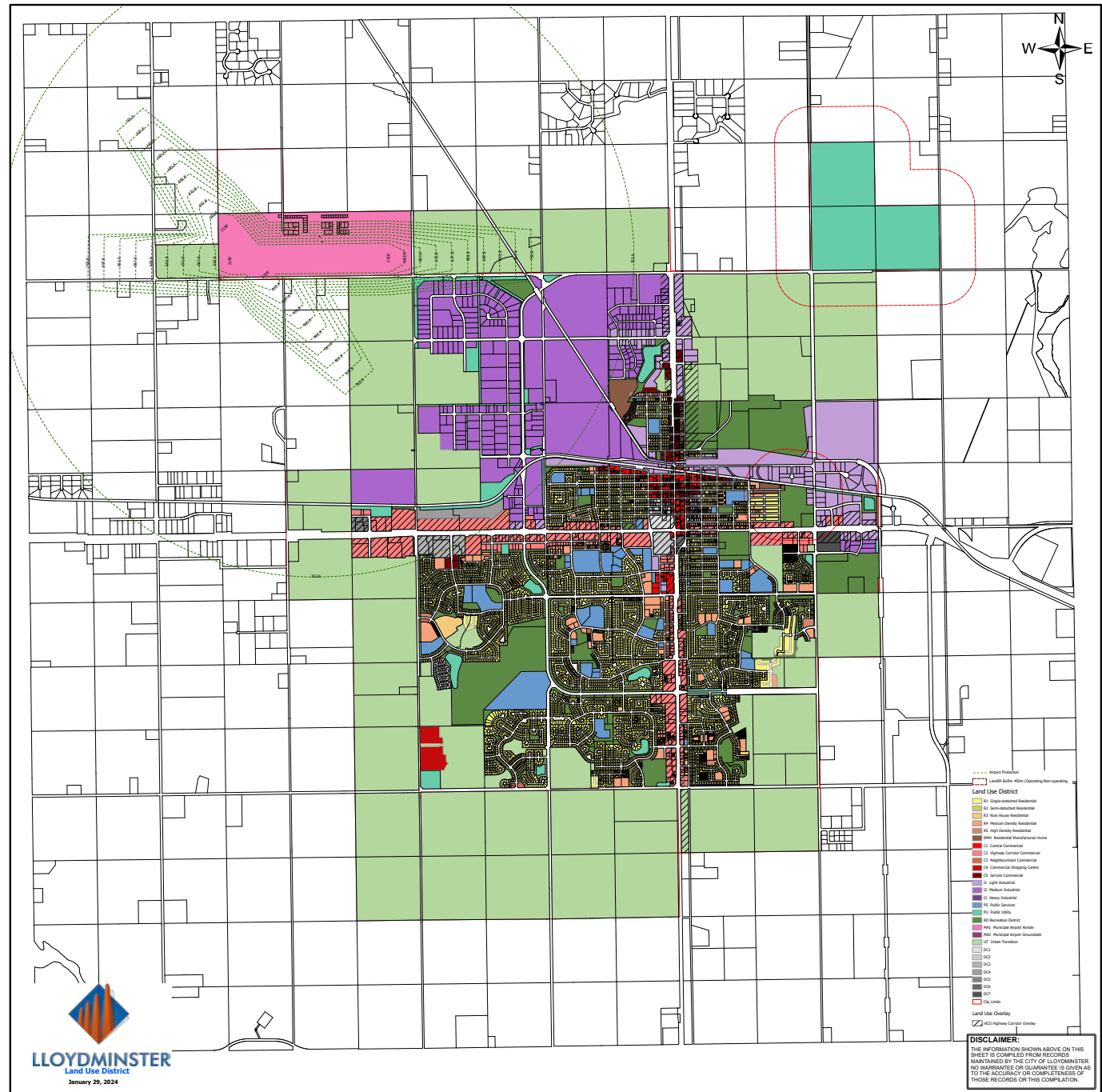
⁹ Lloydminster.ca, Annexation, Accessed July 26, 2024

Figure 2-9. City of Lloydminster Land Use District, Updated in January 2024

(Source: City of Lloydminster)

Land Use District

- R1 Single-detached Residential
- R2 Semi-detached Residential
- R3 Row House Residential
- R4 Medium Density Residential
- R5 High Density Residential
- RMH Residential Manufactured Home
- C1 Central Commercial
- C2 Highway Corridor Commercial
- C3 Neighbourhood Commercial
- C4 Commercial Shopping Centre
- C5 Service Commercial
- I1 Light Industrial
- I2 Medium Industrial
- I3 Heavy Industrial
- PS Public Services
- PU Public Utility
- RD Recreation District
- MA1 Municipal Airport Airside
- MA2 Municipal Airport Groundside
- UT Urban Transition
- DC1
- DC2
- DC3
- DC4
- DC5
- DC6
- DC7
- City Limits



In developing goals and strategies for building economic resilience, the Strategic Plan offered two sub-sections: 1) Regional Perspective and 2) Business Attraction and Retention. For the Regional Perspective, the Plan called for creating a business a business retention strategy with regional partners (3.3.a), including the Chamber of Commerce, Startup Lloydminster, and Community Futures.

For Business Attraction and Retention, the Plan encouraged economic diversification, which echoed many of the other plans. The Plan aims to determine the most feasible area for future economic growth and support an innovation-driven economy.

The Economic Development Strategic Plan: Overview 2018-2021 was based on the vision of “going beyond borders to secure economic opportunities”. In the objectives, the Plan explicitly stated the aim of encouraging growth in industrial areas, in addition to retail, commercial, and residential zones. The Plan also called for establishing and strengthening partnerships with local groups, including business owners and the Indigenous communities. Although the Strategy did not explicitly address specific opportunities for industrial development, the Strategy called for promoting opportunities for business investment in this area. The complete list of goals and objectives are summarized in **Figure 2-10**.

Figure 2-10. Goals and Objectives for Economic Development

(Source: The Economic Development Strategic Plan: Overview 2018-2021)



The Northeast ASP supports industrial development in this area, given its proximity to major roadways and reasonable distance from incompatible uses. While most of the lands in this Plan area has been categorized as Urban Transition (UT) District, the future land use concept aims to convert most of the UT District to Industrial District to enhance employment opportunities in Lloydminster. The ASP called for identifying areas which could act as “transition areas” between light, medium, and heavy industrial areas.

In addition to the Industrial District, the ASP also offered Commercial & Industrial Service District. This district offers more flexibility in development in the sense that:

- *Compatible industrial uses may be located within commercially-dominate areas; and*
- *Commercial uses may extend into more light industrial uses (5.5).*

The ASP identified the intersection of Highway 17 and 67th Street as an “important gateway” to Lloydminster. The ASP emphasized that “development should respond to and enhance the importance of this area as an economic driver” (Section 5.5). This District also permits development of commercial amenities as well as large scale commercial facilities, including shopping centres and service facilities).

2.4.5 Business Surveys

The goal of the **Lloydminster Northeast ASP Market Study (2019)** was to determine demand for residential, retail, office, industrial, and institutional land in Lloydminster to inform the Northeast ASP, although its analysis includes the whole City. Based on 2046 population and business growth projections, the study noted the following implications for land use planning related to industrial:

- **Lloydminster:** Projects 8,446 new industrial-oriented jobs in Lloydminster, which would require additional demand for between 1,000 and 1,200 acres of new industrial land by 2046.
- **Northeast ASP:** the medium market share scenario indicated forecast 474 acres of industrial absorption during the 30-year study timeline, with a low scenario of 255 acres and a high scenario of 620 acres.

Figure 2-12. Northeast ASP Future Land Use Concept

(Source: Northeast ASP)

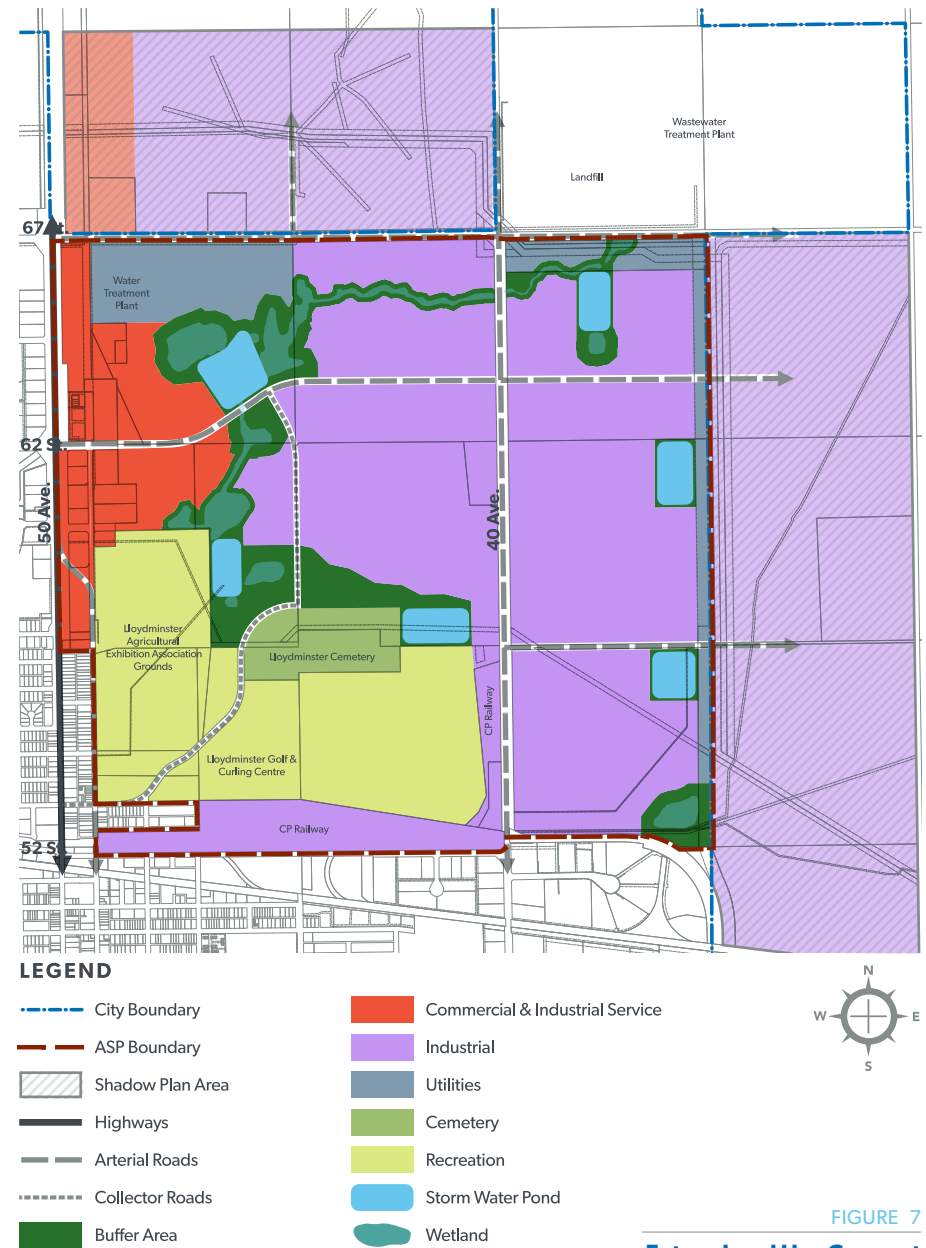


FIGURE 7
Future Land Use Concept

In **Lloydminster’s 2023 Annual Business Survey** aimed to explore current needs of businesses in Lloydminster, which would determine Lloydminster’s priorities for investment and strategies for business growth.

The survey included phone calls and web surveys. In both forms, respondents were selected randomly and were directly prompted to complete the survey. The survey collected total of 311 responses (70 phone interviews and 241 web surveys). The web survey was open from November 15th to December 17th, 2023. While the majority of the survey respondents were in retail and service sectors (27% and 21% respectively), the survey respondents also included business owners from industrial sectors, namely:

- Mining, oil and gas: 11%
- Construction: 7%
- Transportation: 5%
- Manufacturing: 3%.

Respondents were generally satisfied with operating their business in Lloydminster (79%). Among local business owners, municipal property taxes, support from Lloydminster, and the availability of skilled labour forces were the most crucial factors.

Figure 2-14 and **Figure 2-15** illustrate the key strengths and challenges that respondents highlighted. Respondents identified access to two provinces and strong local support as two top assets in Lloydminster (24% and 21% respectively). The most prominent challenge for business owners was a lack of skilled labour forces (21%). Notably, “being a border city” was the second top challenge that respondents identified for operating a business (18%).

Figure 2-13. What do you see as some of the key STRENGTHS of operating a business in Lloydminster?

(Source: Lloydminster, 2023 Annual Business Survey)

Figure 24: Key strengths of operating a business in the City (n=240)

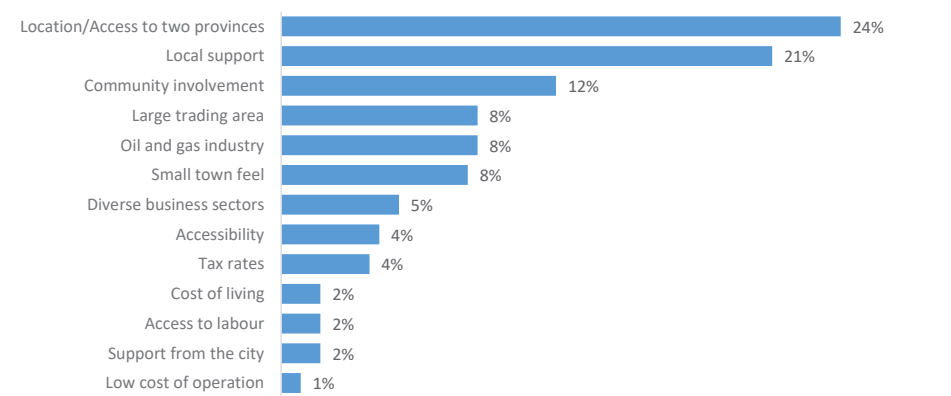
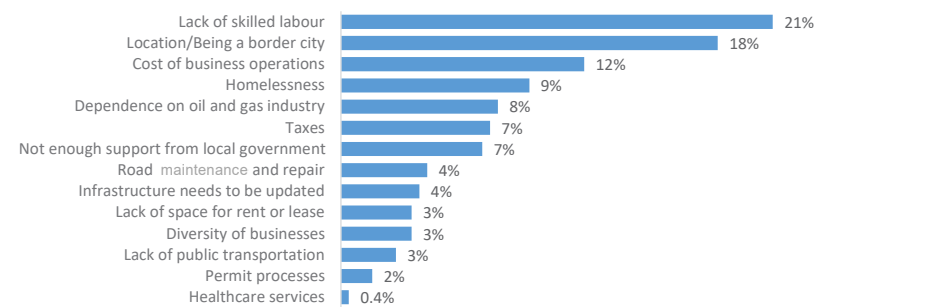


Figure 2-14. What do you see as some of the key CHALLENGES of operating a business in Lloydminster?

(Source: Lloydminster, 2023 Annual Business Survey)

Figure 25: Key challenges (n=266)



2.4.6 Airport Study

Lloydminster Airport Master Plan (2020) and Update (2024) aimed to offer directions for development in the Lloydminster Municipal Airport over the time span of 2025 to 2044. The Plan offered three planning horizons for development: short (1-5 years), medium (6-10 years), and long term (11-25 years). This Plan supported one of the objectives of the Economic Development Strategic Plan (2018), which was to “achieve optimal use of the Airport”.

The vision statement of the Plan emphasized that:

“Lloydminster Airport shall be a transportation, economic development, and community asset through responsible growth, financial sustainability, and service excellence. The Airport will be recognized as one of the top regional facilities in the Prairies”¹⁰

Figure 2-16 illustrates the recommended land use plan within the Airport land boundary. The recommendations were made based on the following five objectives:

- *Protect for safe and efficient Airport operations;*
- *Provide sufficient land for recommended Airport projects;*
- *Maximize opportunities for land development;*
- *Minimize adverse impacts to off-Airport land uses; and*
- *Ensure that all development occurs in a logical and orderly manner.”¹¹*

While most of the airport lands are dedicated for Airport operation purposes, parcels designated as “Flexible Development” (illustrated in blue) can accommodate both aviation and non-aviation development, including compatible commercial and industrial uses.

The Updated 2024 Plan¹² also developed recommended off-site land use plan (**Figure 2-17**) for the surrounding parcels. Notably, most of the parcels are in Aviation Development (highlighted in blue north of the airport) to allow for a wide range of compatible commercial and industrial developments. Examples of uses included gasoline and service stations, warehouses, distribution facilities, factories, and photovoltaic power generation.

10. Page 9, Lloydminster Airport Master Plan, April 2020

11. Page 90, Lloydminster Airport Master Plan, April 2020

12. Lloydminster Airport Master Plan Update, October 2024

The 2020 Plan and 2024 Update highlighted that the Airport area could be a feasible location for processing and manufacturing of agricultural products, given the access to air transportation and the abundant supply of land. The Plan noted that the Airport is located near Lakeland College’s crop research facility, providing opportunities to create “synergies between the agricultural industry and Lloydminster Airport”¹³.

Together, the Plan highlighted the intent of expanding commercial and industrial opportunities beyond the existing Airport land boundary. The Plan emphasized that the Airport could be an attractive node for businesses, “[given] the visibility of the Airport to the traveling public and its role as a gateway to Lloydminster”¹⁴. However, the Plan noted that a lack of municipal servicing could be a challenge in operating industrial activities.

The COVID-19 pandemic transformed and unprecedentedly affected the domestic and international aviation industries and fundamentally impacted the assumptions, analysis, and recommendations of the Master Plan. As the effects of the pandemic have decreased, the City is now positioned to reexamine the Airport amid a changed aviation industry, capitalize on new opportunities, and address emergent challenges such as the loss of scheduled passenger air services. The purpose of the 2024 update was to assess the state of the scheduled passenger air service market, complete detailed research on postpandemic regional demand, identify prospective opportunities for service restoration, and provide an implementation strategy. The Master Plan Update identified the following objectives:

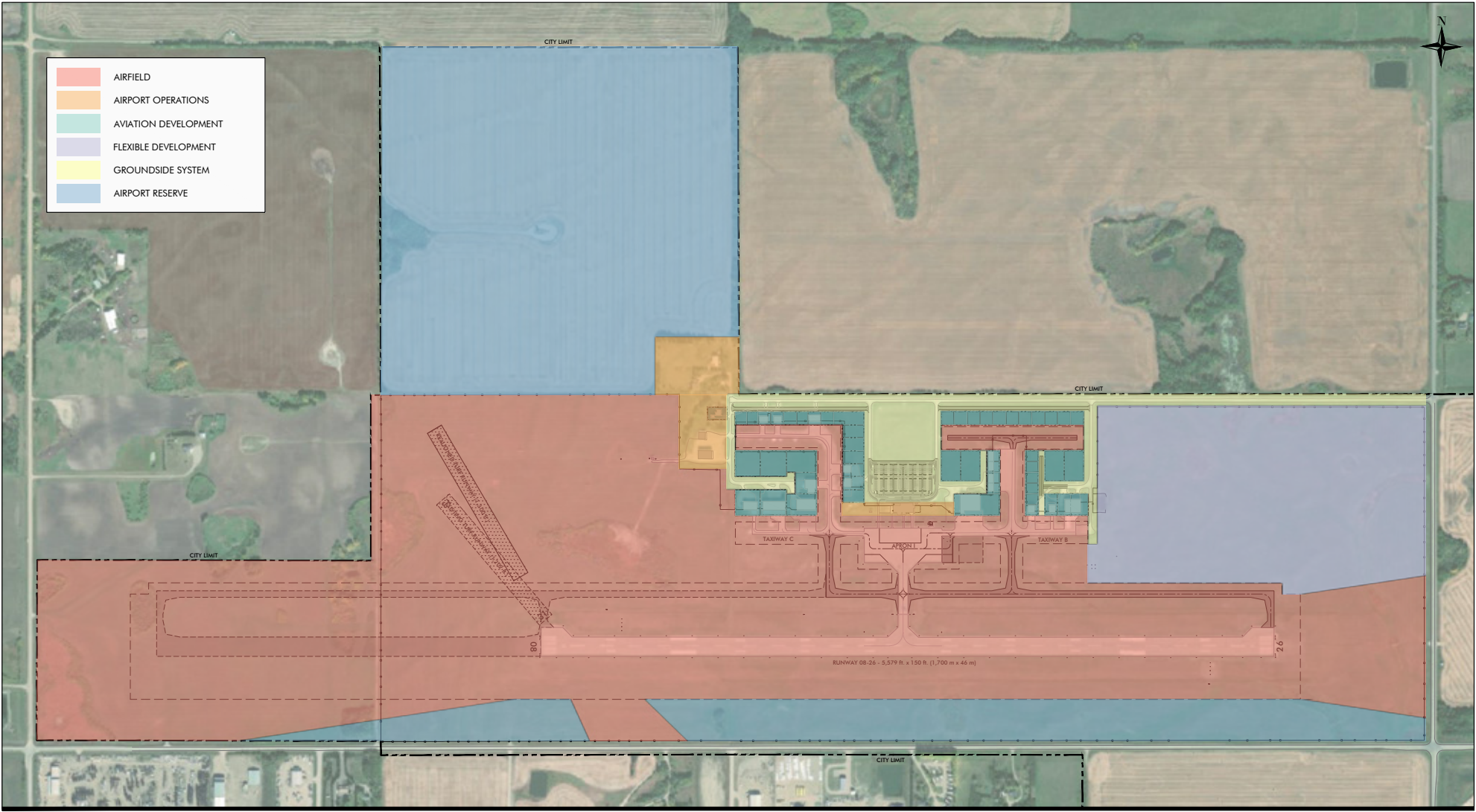
1. Evaluate the implementation of the Master Plan and the facility’s activities between 2020 and 2024;
2. Prepare an updated demand outlook considering the cessation of scheduled passenger services in 2024 and the evolution of the regional economy and aviation industry; and
3. Provide updated recommendations on renewing and improving the Airport’s infrastructure and services to meet demand.

13. Page 100, Lloydminster Airport Master Plan, April 2020

14. Page 99, Lloydminster Airport Master Plan, April 2020,

Figure 2-15. Recommended Airport Land Use Plan

(Source: Lloydminster Airport Master Plan UPDATE, 2024)



(Source: Lloydminster Airport Master Plan, 2020)



2.5 Transportation

Transportation attributes are an essential foundation to meeting demand in the industrial sector. An understanding of these attributes can help create the necessary conditions for attracting and retaining businesses and residents to locate in a community.

Highway 16 and 17 are key transportation routes for Lloydminster with Yellowhead Highway 16 connecting Lloydminster with Edmonton and Saskatoon. **Figure 2-18** presents traffic counts on both highways as provided by the provinces of Alberta and Saskatchewan. Overall, the traffic volume has been steady in both provinces.

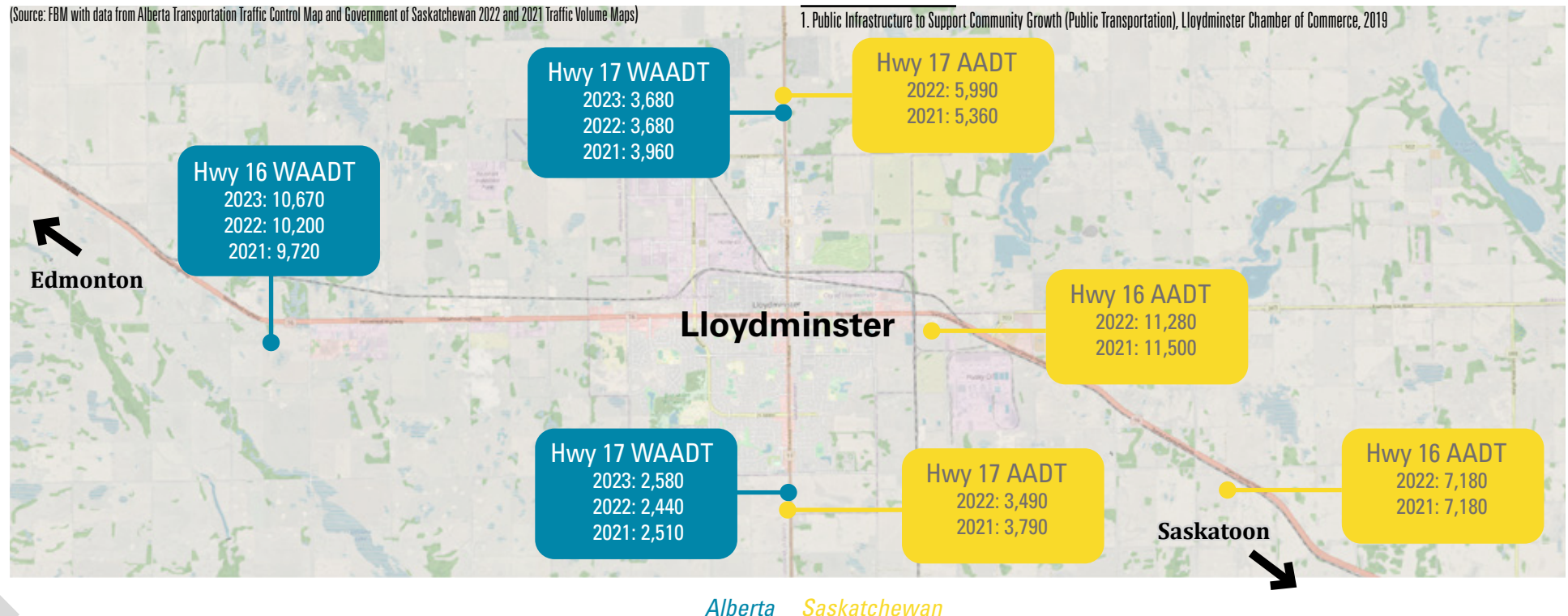
Traffic volume in Saskatchewan was based on Average Annual Daily Traffic (AADT) at given location over the entire year. Alberta's traffic information differs from Saskatchewan's in that it is provided as Weighted Average Annual Daily Traffic (WAADT) volume which is a synthesis of several point AADT volumes into a single volume number

for each portion of road with similar characteristics (i.e. per Traffic Control Section). Despite these differences, Highway 16 consistently has the highest traffic volumes with traffic slightly higher to the West. Looking at the shared border between Alberta and Saskatchewan, the northern portion of Highway 17 sees higher traffic volumes than the southern portion which suggests visitors to Lloydminster often come from the north.

Within Lloydminster, Rider Express Travels provides regional passenger bus services between Edmonton, AB and Saskatoon, SK with service to Lloydminster, North Battleford, and Vermilion. Border City Connects also provides people who have special needs and/or mobility challenges with door-to-door transportation within and beyond Lloydminster. Lloydminster currently has no public transportation system despite repeated calls from local organizations (such as the Lloydminster Chamber of Commerce¹) to invest in a small scale pilot projects intended to support students, senior citizens, low-income individuals, and immigrants in safely accessing goods and services across Lloydminster.

Figure 2-17. Lloydminster Traffic Count Map

(Source: FBM with data from Alberta Transportation Traffic Control Map and Government of Saskatchewan 2022 and 2021 Traffic Volume Maps)



2.6 Demographic Snapshot 2024

The following section details notable demographic markers for Lloydminster, Vermilion River County, and RM County of Wilton, based on year end 2024 data. This represents the most recent available data from Manifold Data Mining Inc., whose projections differ from, and are informed by, sources including but not limited to: Statistics Canada, Provincial & Municipal Open Data, CMHC, and Real Estate Boards / Companies.

City of Lloydminster

- Top **occupations**: Sales and service (27.58%) & Trades, transport and equipment operators and related occupations (21.22%)
- Prominent **industries**: Mining, quarrying, and oil and gas extraction (14.62%) & Retail trade (14.61%)
- Dominant commute mode: Vehicle (85.22%)
- Commutes less than 15 min: 55.29%

Vermilion River County

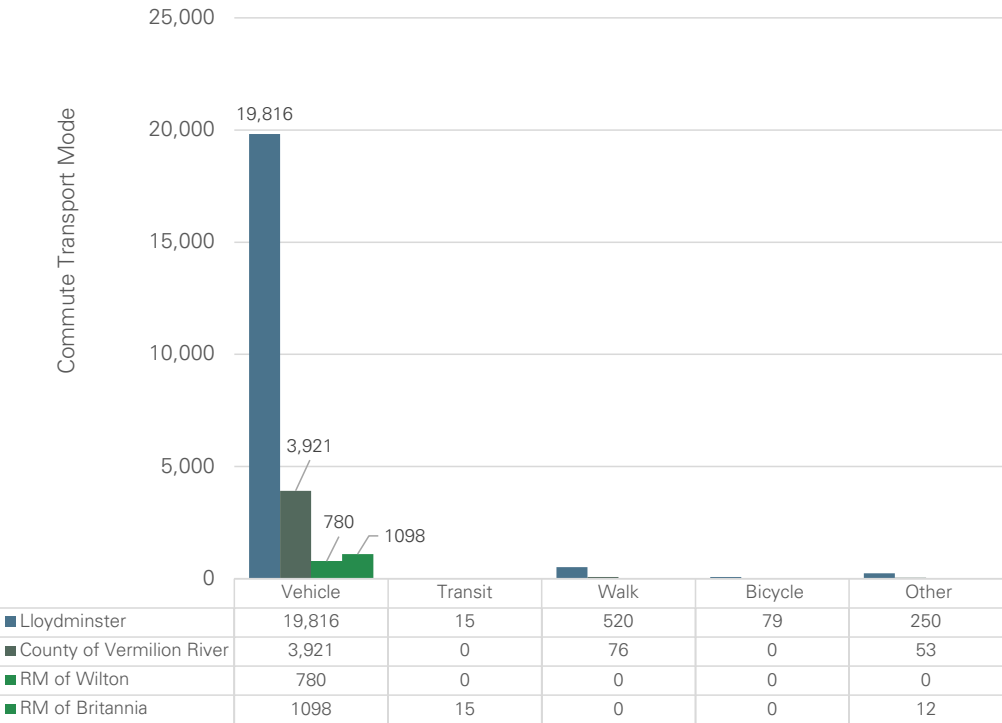
- Top **occupations**: Natural resources, agriculture, and related production occupations (31.86%) & Trades, transport and equipment operators and related occupations (19.05%)
- Prominent **industries**: Agriculture, forestry, fishing, and hunting (28.84%) & Mining, quarrying, and oil and gas extraction (10.81%)
- Dominant commute mode: Vehicle (78.62%)
- Commutes less than 15 min: 22.08%

RM of Wilton

- Top **occupations**: Natural resources, agriculture, and related production occupations (33.26%) & Trades, transport and equipment operators and related occupations (18.78%)
- Prominent **industries**: Agriculture, forestry, fishing, and hunting (29.83%) & Mining, quarrying, and oil and gas extraction (13.09%)
- Dominant commute mode: Vehicle (83.69%)
- Commutes less than 15 min: 17.49%

Figure 2-18. Commute Mode of Transport (% of labour force over 15yrs of age)

(Source: FBM & Manifold Data Mining Inc.)



RM of Britannia

- Top **occupations**: Trades, transport and equipment operators and related occupations (24.12%), Natural resources, agriculture and related production occupations (19.16%) & Sales and service occupations (18.32%)
- Prominent **industries**: Mining, quarrying, and oil and gas extraction (20.53%) & Agriculture, forestry, fishing, and hunting (15.57%)
- Dominant commute mode: Vehicle (83.82%)
- Commutes less than 15 min: 22.29%

Table 2-1. Labour Force Information (2024)

(Source: FBM and Manifold Data Mining Inc.)

Attribute	Alberta		Saskatchewan			Lloydminster, AB/SK			Vermilion River County, AB			Wilton No. 472, SK			Britannia No. 502, SK		
	value	percent	value	percent	index	value	percent	index	value	percent	index	value	percent	index	value	percent	index
LABOUR FORCE ACTIVITY - TOTAL																	
Total population 15+ years	3,816,820		994,642			31,060			6,854			1,205			1,675		
In the labour force	2,666,910	69.87%	668,637	67.22%	96	23,253	74.87%	107	4,987	72.76%	104	932	77.34%	111	1,310	78.21%	112
Employed	2,503,440	65.59%	637,657	64.11%	98	21,618	69.60%	106	4,772	69.62%	106	894	74.19%	113	1,252	74.75%	114
Unemployed	163,470	4.28%	30,980	3.12%	73	1,634	5.26%	123	215	3.14%	73	38	3.15%	74	58	3.46%	81
Not in the labour force	1,149,900	30.13%	326,005	32.78%	109	7,807	25.14%	83	1,866	27.23%	90	273	22.66%	75	365	21.79%	72
Participation rate (%)		69.87%		67.22%	96		74.86%	107		72.77%	104		77.34%	111		78.22%	112
Employment rate (%)		65.59%		64.11%	98		69.60%	106		69.62%	106		74.20%	113		74.75%	114
Unemployment rate (%)		6.13%		4.63%	76		7.03%	115		4.32%	70		4.06%	66		4.44%	72
PLACE OF WORK																	
Total employed labour force 15 years and over by place of work status	2,503,440		637,657			21,618			4,772			894			1,252		
At home	246,445	9.24%	52,259	7.82%	85	933	4.01%	43	718	14.40%	156	113	12.12%	131	126	9.62%	104
Outside Canada	6,609	0.25%	793	0.12%	48	4	0.02%	8	3	0.06%	24	1	0.11%	44	1	0.08%	32
No fixed workplace address	443,845	16.64%	95,952	14.35%	86	4,288	18.44%	111	851	17.06%	103	164	17.60%	106	355	27.10%	163
Usual place of work	1,806,540	67.74%	488,654	73.08%	108	16,393	70.50%	104	3,200	64.17%	95	616	66.09%	98	770	58.78%	87
MODE OF TRANSPORTATION																	
Total employed labour force 15 years and over who commute to work by mode of transportation	2,250,390		584,606			20,681			4,051			780			1,125		
Car, truck or van	1,968,890	73.83%	534,982	80.01%	108	19,816	85.22%	115	3,921	78.62%	106	780	83.69%	113	1,098	83.82%	114
Car, truck, van, as driver	1,843,970	69.14%	503,805	75.35%	109	18,512	79.61%	115	3,837	76.94%	111	735	78.86%	114	1,098	83.82%	121
Car, truck, van, as passenger	124,923	4.68%	31,178	4.66%	100	1,304	5.61%	120	84	1.68%	36	45	4.83%	103	0	0.00%	0
Public transit	126,360	4.74%	9,935	1.49%	31	15	0.07%	1	0	0.00%	0	0	0.00%	0	15	1.15%	24
Walked	89,201	3.35%	27,261	4.08%	122	520	2.24%	67	76	1.52%	45	0	0.00%	0	0	0.00%	0
Bicycle	14,910	0.56%	3,097	0.46%	82	79	0.34%	61	0	0.00%	0	0	0.00%	0	0	0.00%	0
Other method	51,027	1.91%	9,330	1.40%	73	250	1.08%	57	53	1.06%	55	0	0.00%	0	12	0.92%	48
COMMUTING DURATION																	
Total employed population aged 15 years and over with a usual place of work	2,250,390		584,606			20,681			4,051			780			1,125		
Less than 15 minutes	683,568	25.63%	275,144	41.15%	161	12,857	55.29%	216	1,101	22.08%	86	163	17.49%	68	292	22.29%	87
15 to 29 minutes	885,329	33.20%	210,708	31.51%	95	4,720	20.30%	61	1,653	33.15%	100	372	39.91%	120	458	34.96%	105
30 to 44 minutes	436,508	16.37%	57,577	8.61%	53	1,557	6.70%	41	687	13.78%	84	159	17.06%	104	236	18.02%	110
45 to 59 minutes	120,108	4.50%	18,156	2.72%	60	565	2.43%	54	308	6.18%	137	15	1.61%	36	35	2.67%	59
60 minutes and over	124,875	4.68%	23,022	3.44%	74	981	4.22%	90	302	6.06%	129	71	7.62%	163	104	7.94%	170

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

Table 2-2. Labour Force Industry and Occupation (2024)

(Source: FBM and Manifold Data Mining Inc.)

Attribute	Alberta		Saskatchewan			Lloydminster, AB/SK			Vermilion River County, AB			Wilton No. 472, SK			Britannia No 502, SK		
	value	percent	value	percent	index	value	percent	index	value	percent	index	value	percent	index	value	percent	index
LABOUR FORCE INDUSTRY																	
Total labour force population aged 15+ years - North American Industry Classification System (NAICS) 2017	2,666,910		668,637			23,253			4,987			932			1,310		
Industry - not applicable	79,692	2.99%	14,562	2.18%	73	661	2.84%	95	41	0.82%	27	0	0.00%	0	0	0.00%	0
All industries	2,587,220	97.01%	654,075	97.82%	101	22,592	97.16%	100	4,946	99.18%	102	932	100.00%	103	1,310	100.00%	103
11 Agriculture, forestry, fishing, and hunting	76,906	2.88%	62,441	9.34%	324	734	3.16%	110	1,438	28.84%	1,001	278	29.83%	1,036	204	15.57%	541
21 Mining, quarrying, and oil and gas extraction	128,887	4.83%	20,946	3.13%	65	3,400	14.62%	303	539	10.81%	224	122	13.09%	271	269	20.53%	425
22 Utilities	23,738	0.89%	5,361	0.80%	90	103	0.44%	49	1	0.02%	2	0	0.00%	0	0	0.00%	0
23 Construction	248,409	9.31%	52,600	7.87%	85	1,741	7.49%	80	351	7.04%	76	76	8.16%	88	95	7.25%	78
31-33 Manufacturing	138,533	5.20%	29,743	4.45%	86	820	3.53%	68	163	3.27%	63	64	6.87%	132	43	3.28%	63
41 Wholesale trade	81,098	3.04%	22,015	3.29%	108	756	3.25%	107	185	3.71%	122	19	2.04%	67	60	4.58%	151
44-45 Retail trade	299,104	11.22%	73,547	11.00%	98	3,396	14.61%	130	432	8.66%	77	43	4.61%	41	135	10.31%	92
48-49 Transportation and warehousing	149,929	5.62%	27,203	4.07%	72	1,063	4.57%	81	256	5.13%	91	0	0.00%	0	128	9.77%	174
51 Information and cultural industries	30,769	1.15%	7,973	1.19%	103	155	0.67%	58	2	0.04%	3	0	0.00%	0	13	0.99%	86
52 Finance and insurance	77,096	2.89%	21,166	3.17%	110	640	2.75%	95	91	1.83%	63	19	2.04%	71	30	2.29%	79
53 Real estate and rental and leasing	42,822	1.61%	6,890	1.03%	64	206	0.89%	55	46	0.92%	57	0	0.00%	0	0	0.00%	0
54 Professional, scientific, and technical services	206,433	7.74%	29,751	4.45%	57	899	3.87%	50	288	5.78%	75	13	1.40%	18	66	5.04%	65
55 Management of companies and enterprises	3,940	0.15%	522	0.08%	53	12	0.05%	33	0	0.00%	0	0	0.00%	0	0	0.00%	0
56 Administrative and support, waste management and remediation services	105,824	3.97%	18,652	2.79%	70	623	2.68%	68	40	0.80%	20	32	3.43%	86	13	0.99%	25
61 Educational services	174,157	6.53%	54,816	8.20%	126	1,464	6.30%	96	326	6.54%	100	44	4.72%	72	51	3.89%	60
62 Health care and social assistance	337,388	12.65%	97,471	14.58%	115	2,690	11.57%	91	311	6.24%	49	77	8.26%	65	97	7.41%	59
71 Arts, entertainment, and recreation	47,147	1.77%	10,322	1.54%	87	327	1.41%	80	54	1.08%	61	19	2.04%	115	0	0.00%	0
72 Accommodation and food services	155,048	5.81%	37,379	5.59%	96	1,558	6.70%	115	82	1.64%	28	13	1.40%	24	13	0.99%	17
81 Other services (except public administration)	121,523	4.56%	29,344	4.39%	96	1,354	5.82%	128	211	4.23%	93	97	10.41%	228	72	5.50%	121
91 Public administration	138,471	5.19%	45,936	6.87%	132	651	2.80%	54	131	2.63%	51	13	1.40%	27	23	1.76%	34
OCCUPATION																	
Total labour force 15 years and over by occupation	2,666,910		668,637			23,253			4,987			932			1,310		
Occupation - not applicable	79,692	2.99%	14,562	2.18%	73	661	2.84%	95	41	0.82%	27	0	0.00%	0	0	0.00%	0
All occupations	2,587,220	97.01%	654,075	97.82%	101	22,592	97.16%	100	4,946	99.18%	102	932	100.00%	103	1,310	100.00%	103
0 Management occupations	24,427	0.92%	4,609	0.69%	75	98	0.42%	46	21	0.42%	46	23	2.47%	268	11	0.84%	91
1 Business, finance, and administration occupations	436,463	16.37%	96,181	14.39%	88	3,293	14.16%	86	702	14.08%	86	93	9.98%	61	199	15.19%	93
2 Natural and applied sciences and related occupations	210,767	7.90%	34,000	5.09%	64	1,057	4.55%	58	193	3.87%	49	31	3.33%	42	50	3.82%	48
3 Health occupations	211,314	7.92%	57,875	8.66%	109	1,533	6.59%	83	272	5.45%	69	48	5.15%	65	83	6.34%	80
4 Occupations in education, law and social, community and government services	287,317	10.77%	83,331	12.46%	116	2,170	9.33%	87	326	6.54%	61	80	8.58%	80	88	6.72%	62
5 Occupations in art, culture, recreation, and sport	57,155	2.14%	11,051	1.65%	77	325	1.40%	65	23	0.46%	21	0	0.00%	0	17	1.30%	61
6 Sales and service occupations	631,812	23.69%	157,259	23.52%	99	6,412	27.58%	116	715	14.34%	61	148	15.88%	67	240	18.32%	77
7 Trades, transport and equipment operators and related occupations	518,146	19.43%	124,123	18.56%	96	4,934	21.22%	109	950	19.05%	98	175	18.78%	97	316	24.12%	124
8 Natural resources, agriculture, and related production occupations	114,520	4.29%	65,121	9.74%	227	1,782	7.66%	179	1,589	31.86%	743	310	33.26%	775	251	19.16%	447
9 Occupations in manufacturing and utilities	95,298	3.57%	20,526	3.07%	86	986	4.24%	119	154	3.09%	87	23	2.47%	69	55	4.20%	118

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

3.0 Trends

3.1 Introduction

The following section provides a high-level overview of FBM's research on broader, prevailing industrial trends, including agribusiness, eco-industrial parks, warehousing and distribution facilities, and oil and gas industries. Key implications for Lloydminster are presented throughout.

3.2 Key Industries

3.2.1 Agribusiness

Agribusiness is an emerging trend in recent industrial markets in Canada. Agribusiness is different from "agriculture" in the sense that it "comprises all of the steps through which a given commodity has to go in order to reach the consumer's plate"¹. Agribusiness offers three key components: agricultural input, production and the processing-manufacturing sectors². In other words, agribusiness oversees the entire process of agricultural practices, from harvesting to reaching out to consumers through shipping and manufacturing. Agribusiness is an important trend to watch as commercial and industrial developments have been expanding to suburban, rural, and urban fringe areas in response to rapid economic and population growth.

Along with the wider range of roles, what differentiates agribusiness from agriculture is the reliance on **advanced technology**³. Advanced technology and efficient data collection are critical in sustaining this rapidly growing industry. Artificial Intelligence (AI) has been playing a prominent role in expanding agribusiness. Agribusiness sectors have been taking advantage of AI for data analysis and modeling to "gather data on details from soil health to weather, disease, and pest mitigation"⁴. This helps agribusiness owners to offer consistent and efficient food production. Alberta has been the leading province for agribusiness. One of the factors that encourage the growth of agribusiness is that Alberta is "the fastest-growing adopter of digital transformative technologies"⁵.

1. FASKEN, Doing Business in Canada 2022, 2021

2. Climate Smart Agriculture Youth Network (CSAYN). Agribusiness, n.d.

3. Dentons, Agribusiness in Canada, n.d.

4. Calgary Economic Development, Digital transformation drives growth in Alberta's agribusiness, n.d.

5. Calgary Economic Development, Digital... n.d.

Agribusiness is particularly relevant in Lloydminster's industrial market, given the strong ties to the productions of wheat, barley, and canola. The City's website highlights that "Home to one of Canada's largest canola crushing facilities and Canada's largest bio-diesel plant, Lloydminster has long been a manufacturing and value-added destination for the agriculture and oil industries"⁶. The City's MDP also highlighted that "Lloydminster shall promote and encourage the establishment of agri-business in Lloydminster by taking advantage of Lloydminster's status as an important transportation hub for agricultural and oil and gas commodities"⁷.

3.2.2 Oil and Gas Sector

The oil and gas sector has been experiencing two major trends: responding to the rise of clean energy alternatives and growing awareness toward improving the work environment.

Oil and gas companies have been seeking opportunities for investing in green initiatives to enhance an operational efficiency and to reduce emissions. Deloitte's survey of oil and gas company executives in July 2023 highlighted that 60% of the respondents would "invest in low-carbon projects if the returns on these projects [were expected to] exceed 12% to 15%"⁸. Common strategies included using low-carbon fuels as their primary source of operations.

Growing interest in clean energy transition also ties into another emerging trend, which was improving the work environment in an effort to attract and retain employees in the oil and gas sector. With the growing interest in advanced technology and adapting innovative practices, retaining highly skilled workers is crucial. Young workers with specialized degrees and skills can play a vital role in sustaining the research.

The Deloitte report highlighted the growing interest towards generative artificial intelligence (AI) in the oil and gas sector. Defined as "a subset of artificial intelligence in which machines create new content in the form of text, code, voice, images, videos, processes, and even the

6. City of Lloydminster, Business and Growth, 2024

7. City of Lloydminster Municipal Development Plan (MDP), 2023

8. Deloitte, 2024 Oil and Gas Industry Outlook

structure of proteins”⁹, generative AI could be a leading factor in enhancing operational efficiency and reducing material consumption.

McKinsey & Company report highlighted the growing interest towards adding a distinctive employee value proposition (EVP). Examples of EVP’s include compensation, work-life balance, and company culture.

3.2.3 Warehousing and Storage

Like the oil and gas sector, retaining employees has been critical in the warehousing and distribution sector. Since the pandemic, there has been a growing interest towards enhancing designs of industrial warehousing and distribution facilities to support the health and well-being of employees¹⁰. Distribution facilities are often located in remote communities due to the size of the facilities and zoning regulations, hindering workers from accessing restaurants and services during work hours. Locating distribution facilities near public transportation and existing amenities can contribute to supporting employees’ health and well-being, which in turn can result in increased productivity of the industry.

While Edmonton has been facing a shortage of industrial warehousing and distribution facilities¹¹, Lloydminster can serve as a hub for offering those facilities given the proximity to major transportation corridors including TransCanada Yellowhead Highway and Highway 17. Warehousing facilities are dispersed across Lloydminster, including Cenovus Production Warehouse, Pinnacle Distribution, and Wesco Distribution Canada. By exploring opportunities for design interventions, Lloydminster can be an attractive location for warehousing and distribution workers.

Figure 3-1. Wellness Objectives of Distribution Facilities
(Source: (NAIOP Research Foundation, June 2023)



3.3 Sustainability in Industrial Development

3.3.1 Sustainable Manufacturing

Sustainable manufacturing can be defined as “the creation of manufactured products through economically-sound processes that minimize negative environmental impacts while conserving energy and natural resources”¹². Sustainable manufacturing can be applicable to all sizes of business and all sectors because it improves “operational efficiency by reducing costs and waste”¹³. By pursuing this vision of sustainable manufacturing, companies can also “protect and strengthen brand and reputation and build public trust”¹⁴. Collectively, sustainable manufacturing has been gaining popularity among companies that aim to convey a strong message to the public that they are committed to protecting natural resources.

9. Deloitte, 2024 Oil and Gas Industry Outlook
10. NAIOP Research Foundation, Designing Wellness in Distribution Centers by KSS Architects, Jun 19 2023
11. Colliers, Edmonton Industrial Market Report, Q4 2022

12. United States Environmental Protection Agency, Sustainable Manufacturing, Jan 10 2023
13. United States Environmental Protection Agency, Sustainable... 2023
14. United States Environmental Protection Agency, Sustainable...2023

Adding a sustainability lens to manufacturing is especially relevant in Lloydminster. Lloydminster's MDP identified innovative manufacturing as one of the key industries in Lloydminster. There is a growing demand to be more conscious of the impacts of development on the environment, in response to customers' increased awareness of climate change and associated crises such as extreme weather, wildfires and drought.

3.3.2 Eco-Industrial Park

An eco-industrial park (EIP) can be defined as: "an earmarked area for industrial use at a suitable site that ensures sustainability through the integration of social, economic and environmental quality aspects into its siting, planning, operations, management and decommissioning"¹⁵. Eco-industrial parks often feature several ecological and innovative design features, namely green energy systems, on-site solar generators, and efficient ventilation systems.

Another component of eco-industrial parks is the consideration for more efficient use of land and operation of costs. In more urban locations or in some areas, smaller geographically constrained communities where land is at a premium, such consideration could include vertical or multi-storey buildings with green roofs or living walls, while providing a format for multiple businesses to share overall building operational costs and property taxes.

As Lloydminster looks toward innovative industrial development options, purpose built eco-industrial parks present a unique opportunity to balance economic development and environmental objectives.

15. UNIDO, *Eco-Industrial Handbook*, 2017

Figure 3-2. Key Components of Eco-Industrial Parks

(Source: UNIDO Handbook)



3.4 Emerging Trends in Industrial Development

3.4.1 Multi-Tenant Industrial Facilities

Multi-tenant buildings have been gaining attention in industrial markets across North America. In multi-tenant facilities, growing businesses can expand into an additional available unit within the same property or at the same industrial complex without the need to relocate. By serving as a shared hub for industrial activities, multi-tenant industrial facilities can also be affordable, cost-effective spaces for small and medium-sized enterprises.

Multi-tenant industrial facilities can also support the growing interest toward economic diversification. Designed to house tenants across varying industries, multi-tenant facilities offer greater flexibility in response to the needs of the market. Lloydminster's MDP included economic diversification as part of supporting innovation and economic prosperity.

3.4.2 Industrial Clustering

Industrial clusters are typically defined as "geographic areas that comprise co-located companies representing either a single or multiple industries"¹⁶. Industrial clustering offers both economic and environmental benefits. Research by Indiana University highlights that industry cluster is "a strategy to improve overall business environment conditions, by upgrading skills, access to finance and infrastructure, by streamlining government rules and regulations, by supporting local demand, and by being open to foreign investment and competition"¹⁷. From an environmental perspective, industrial clustering can generate a more efficient energy network. Energy sources such as hydrogen can be co-located and shared among tenants, which helps to save investment for long-distance infrastructure¹⁸. The City's MDP supported the clustering of industrial development as part of offering a resilient community environment in response to climate change. In doing so, the MDP encouraged "partnerships and efficiencies between industrial park tenants consistent with eco-industrial planning principles"¹⁹.

16. Accenture, *Achieving net-zero future with industrial clusters*, March 1 2021

17. Indiana University, *Industry Cluster and Economic Development*, 2015

18. World Economic Forum, *Industrial clusters are critical to getting to net-zero. Here's why*, October 29 2020

19. Page 69, Lloydminster MDP, 2023

3.4.2 Transportation and Enhancing Connectivity

There is a growing interest in creating integrated and connected community environments. While this has been a common vision in many planning subfields, this has also been a trend in the context of industrial and commercial developments. Improving connectivity is also important in recruiting workers and researchers, especially in the fields of robotics, agribusiness, and sustainable manufacturing.

Transportation has been a topic of interest because as economies grow and diversify, the surrounding communities will also grow and diversify, leading to the need to expand, improve and enhance the transportation network for public transit, vehicles, and trucks. Located along the Yellowhead Highway, CN rail line, CPR rail line, Lloydminster has a potential to further position itself as a critical transportation hub.

Efficient transportation network is “critical for many industrial businesses, both local serving and trade-oriented, in terms of where they choose to locate”²⁰. The transportation network can also enhance or constrain the distribution of goods and services, which is especially important “with limited options to increase the land base”²¹. The report also called for “[providing] transit for industrial workers”²², indicating that transportation could play a role in improving the flow of workers.

20. Metro Vancouver, Regional Industrial Land Strategy, June 2020.

21. Metro Vancouver, Regional... June 2020

22. Metro Vancouver, Regional... June 2020

3.4.3 The Lloydminster Factor

As will be seen in the summary of Stakeholder Engagement and from the overall industrial inventory details, Lloydminster and its surrounding supporting and complementary industrial offering broadly specializes in the following critical economic clusters for its success, many of which are reflective of the emerging trends and best practices and in some cases are leaders therein, such as Ecoplast Solutions.

Energy and Oil Services: Lloydminster has long been a hub for oil and gas, given its location in one of Canada’s most productive oil regions. Though traditional energy remains a dominant force, there has been a shift toward more sustainable and diversified energy solutions. This includes investments in renewable energy, carbon capture technologies, and environmental services that support cleaner and more efficient energy production. As energy markets fluctuate, oil service providers in Lloydminster are increasingly focused on adaptive, tech-driven approaches.

Agriculture and Agri-Tech: With a strong agricultural base in the surrounding region, Lloydminster has become a center for agri-business, including grain and livestock processing, fertilizer, and agri-tech. Innovations in precision agriculture and crop sciences are attracting interest, and these ventures have been driving up land demand for both production facilities and storage.

Logistics and Warehousing: As a transit point between Alberta and Saskatchewan, Lloydminster is seeing more development in logistics and distribution facilities, especially along Highway 16. With rising demand for regional distribution networks, more warehouse and cross-docking facilities are emerging to serve nearby rural and urban markets, contributing to higher lease rates in prime locations.

4.0 Industrial Profile

4.1 Introduction

Each of Lloydminster's existing industrial nodes were profiled in detail based on fieldwork observations, City licensing data and desktop research. For the purposes of this analysis, the study area is divided into five broad Sectors. To allow for further depth of analysis, each sector is divided into smaller sub-areas, called "nodes". These nodes and how they fit within the five broad Sectors are shown in **Figure 4-1**. Future industrial areas are captured within the sector boundaries and respective nodes that fall within those broader sectors.

The parcel boundaries were based on the data according to the data from Lloydminster as well as industrial subdivision maps provided by the Vermilion County. Parcels were modified in select circumstances to better represent the parcel area. Employment estimates are based on applying typical ratios as shown in **Table 4-1**.

The results of the profiling exercise yielded an overall picture of Lloydminster's industrial composition and current development status. Tables and Figures provide a summary of Lloydminster's Industrial Business Composition, Land Use Mix and Employment. **Table 4-2** shows the breakdown of the total estimated 422 businesses and estimated 7,112 employees across all Lloydminster's industrial nodes, which includes the immediate surrounding County and RM areas.

Table 4-3 provides a deeper dive into the overall industrial employment, floorspace and land area by each respective node within the same City, County and RM areas.

Table 4-1. Typical Industrial Employment Floorspace Ratios

NAICS	NAICS Category Description	Average Industrial Employment Ratio (sq. ft. per employee)
11	Agricultural Production	1000 to 3000
21	Mining, Quarrying, and Oil and Gas Extraction	1500 to 3000
22	Utilities	800 to 1500
23	Construction	500 to 750
31-33	Manufacturing	500 to 1000
41 - 42	Wholesale Trade	1000 to 2000
48-49	Transportation & Warehousing	1000 to 3000
53	Real Estate and Rental and Leasing	250 to 750
54	Professional, Scientific, and Technical Services	250 to 500
56	Administrative and Support, Waste Management and Remediation Services	800 to 1500
62	Health Care and Social Assistance	250
81	Other Services	500
91	Public Administration	500

Figures 4-3 to 4-5 provide a visual representation of the employment and inventory overall illustrating the relationship between the amount and type of business and floorspace across the market and the value of the employment and number of businesses generated across a wide area of sectors.

4.2 Summary: Total Industrial ALL (City/County/RM)

The following represents a summary of Lloydminster's Total Industrial Area Business Composition, Land Use Mix and Employment Profile:

- Total Gross Land Area: 3,745 acres
- Total Occupied Land Area: 2,741 acres
- Total Building Space (est.): 7,994,046 sq. ft.
- Total Occupied Building Space (est.): 7,409,258 sq. ft.
- Number of Vacant Space: 434,900 sq. ft. / 5.4%
- Average Building Site Coverage: 5.8%
- Vacant or Undeveloped Lots: 599 acres
- Number of Businesses: 422
- Number of Industrial Employees (est): 7,112
- Employee Density per Developed Acre (est): 2.3 employees per acre
- Employee Density per Building Area (est): 1,115 sq. ft. per employee
- Average range of Asking Lease Rates: \$9 to \$15 per sq. ft.

4.3 Summary: Total Industrial City

The following represents a summary of Lloydminster's Total Industrial Area Business Composition, Land Use Mix and Employment Profile:

- Total Gross Land Area: 2,165 acres
- Total Occupied Land Area: 1,302 acres
- Total Building Space (est.): 5,399,409 sq. ft.
- Total Occupied Building Space (est.): 5,115,786 sq. ft.
- Number of Vacant Space: 283,623 sq. ft. / 5.3%
- Average Building Site Coverage: 79.5%
- Vacant or Undeveloped Lots: 460 acres
- Number of Businesses: 335
- Number of Industrial Employees (est): 5,377
- Employee Density per Developed Acre (est): 4.1 employees per acre
- Employee Density per Building Area (est): 951sq. ft. per employee

4.4 Summary: Total Industrial County

The following represents a summary of the adjacent County of Vermilion River's Total Industrial Area Business Composition, Land Use Mix and Employment Profile:

- Total Gross Land Area: 820 acres
- Total Occupied Land Area: 684 acres
- Total Building Space (est.): 1,643,627 sq. ft.
- Total Occupied Building Space (est.): 1,497,250 sq. ft.
- Number of Vacant Space: 146,378 sq. ft. / 8.9%
- Average Building Site Coverage: 5.5%
- Vacant or Undeveloped Lots: 136 acres
- Number of Businesses: 67
- Number of Industrial Employees (est): 1,203
- Employee Density per Developed Acre (est): 1.8 employees per acre
- Employee Density per Building Area (est): 1,244 sq. ft. per employee

4.5 Summary: Total Industrial RM

The following represents a summary of adjacent R.M. of Britannia No. 502 and R.M. of Wilton No. 472 Total Industrial Area Business Composition, Land Use Mix and Employment Profile:

- Total Gross Land Area: 761 acres
- Total Occupied Land Area: 755 acres
- Total Building Space (est.): 951,010 sq. ft.
- Total Occupied Building Space (est.): 946,110 sq. ft.
- Number of Vacant Space: 4,900 sq. ft. / 0.5%
- Average Building Site Coverage: 2.8%
- Vacant or Undeveloped Lots: 3 acres
- Number of Businesses: 26
- Number of Industrial Employees (est): 559
- Employee Density per Developed Acre (est): 0.7 employees per acre
- Employee Density per Building Area (est): 1,691 sq. ft. per employee

Table 4-2. Lloydminster's Industrial Sectors Employee & Business Mix by NAICS Code and Broad Community (City / County / RMs)

(Source: FBM)

Number of TOTAL Employees	Number of TOTAL Businesses	Percentage Share	Number of CITY Employees	Number of CITY Businesses	Number of COUNTY Employees	Number of COUNTY Businesses	Number of RM Employees	Number of RM Businesses	NAICS Code
1,814	110	26%	1,134	85	266	22	414	3	Agriculture, Forestry, Fishing and Hunting
1,091	64	15%	768	48	295	14	28	2	Mining, Quarrying, and Oil and Gas Extraction
1,029	55	13%	810	41	198	10	21	4	Utilities
703	44	10%	573	31	110	9	19	4	Construction
393	34	8%	314	28	65	5	13	1	Manufacturing
552	29	7%	435	23	105	4	11	2	Wholesale Trade
328	24	6%	268	21	40	2	20	1	Retail Trade
231	18	4%	162	16	64	1	5	1	Transportation and Warehousing
121	14	3%	98	12	18	0	5	2	Information and Cultural Industries
233	10	2%	191	9	41	0	1	1	Finance and Insurance
343	6	1%	343	6	0	0	0	0	Real Estate and Rental and Leasing
137	7	2%	137	6	0	0	0	1	Professional, Scientific and Technical Services
36	5	1%	36	5	0	0	0	0	Management of Companies and Enterprises
122	4	1%	112	2	0	0	10	2	Administrative and Support, Waste Management Services
10	1	0%	10	1	0	0	0	0	Educational Services
4	2	0%	0	1	0	0	4	1	Health Care and Social Assistance
0	0	0%	0	0	0	0	0	0	Arts, Entertainment and Recreation
0	0	0%	0	0	0	0	0	0	Accommodation and Food Services
0	0	0%	0	0	0	0	0	0	Other Services (Except Public Administration)
8	1	0%	0	0	0	0	8	1	Public Administration
7,155	428	100%	5,392	335	1,203	67	559	26	

Percentage of Employee Allocation	Average Estimated Employment Density (sf / employee)	Average Estimated Employment Density (employee / acre)	Estimated Number of Employees	Total Building Floorspace	Estimated Building Vacancy (sf)	Estimated Vacancy (%)	Gross Land Area (acres)	Estimated Occupied Land Area (acres)	Estimated Occupied Land Area (sf)	Estimated Occupied Site Coverage (%)	Industrial Node	General Location City/County/RM
0%	1889	1.4	25	47,800	4,900	10.3%	21	19	815,996	5.9%	NE Shadow Area	RM
1%	1349	0.9	54	73,343	0	0.0%	59	59	2,587,254	2.8%	West Peripheral	County
2%	923	1.8	147	135,388	0	0.0%	84	81	3,542,410	3.8%	Foote Industrial	RM
1%	1945	1.5	79	152,846	70,996	46.4%	136	52	2,263,792	6.8%	Reinhart Business Park	County
3%	994	1.7	232	231,172	11,048	4.8%	140	140	6,119,906	3.8%	Reinhart Industrial Park	County
2%	1645	1.7	158	260,313	15,386		127	92	4,015,629	6.5%	Kam's Industrial Park	County
3%	1436	1.8	186	267,717	0	0.0%	105	105	4,562,057	5.9%	Corridor Business Park	County
3%	1324	1.8	215	285,282	35,183	12.3%	125	119	5,167,117	5.5%	Devonia Business Park	County
4%	1343	2.4	278	372,955	13,766	3.7%	127	116	5,068,427	7.4%	County Energy Park	County
8%	1275	1.9	566	721,636	4,770	0.7%	482	291	12,655,748	5.7%	Husky Industrial	City
5%	2000	0.6	384	767,822	0	0.0%	655	655	28,526,813	2.7%	Cenovus Energy	RM
12%	914	5.0	856	781,962	33,583	4.3%	389	171	7,466,553	10.5%	East	City
12%	1023	3.4	889	909,194	65,997	7.3%	527	261	11,365,365	8.0%	Hill Industrial Park North	City
21%	995	6.0	1493	1,485,423	87,816	5.9%	435	249	10,861,664	13.7%	Hill Industrial Park South	City
22%	5	4.9	1562	1,501,194	91,455	6.1%	323	321	13,987,332	10.7%	Glenn E. Nelson Industrial Park	City
0%	n/a	3.0	26	n/a	n/a	n/a	9	9	370,279	n/a	Airport	City
100%	1,111	2.6	7,151	7,994,046	434,900	5.4%	3,745	2,741	119,376,340	6.7%		

Figure 4-1. Lloydminster's Industrial Sectors and Nodes

(Source: FBM)

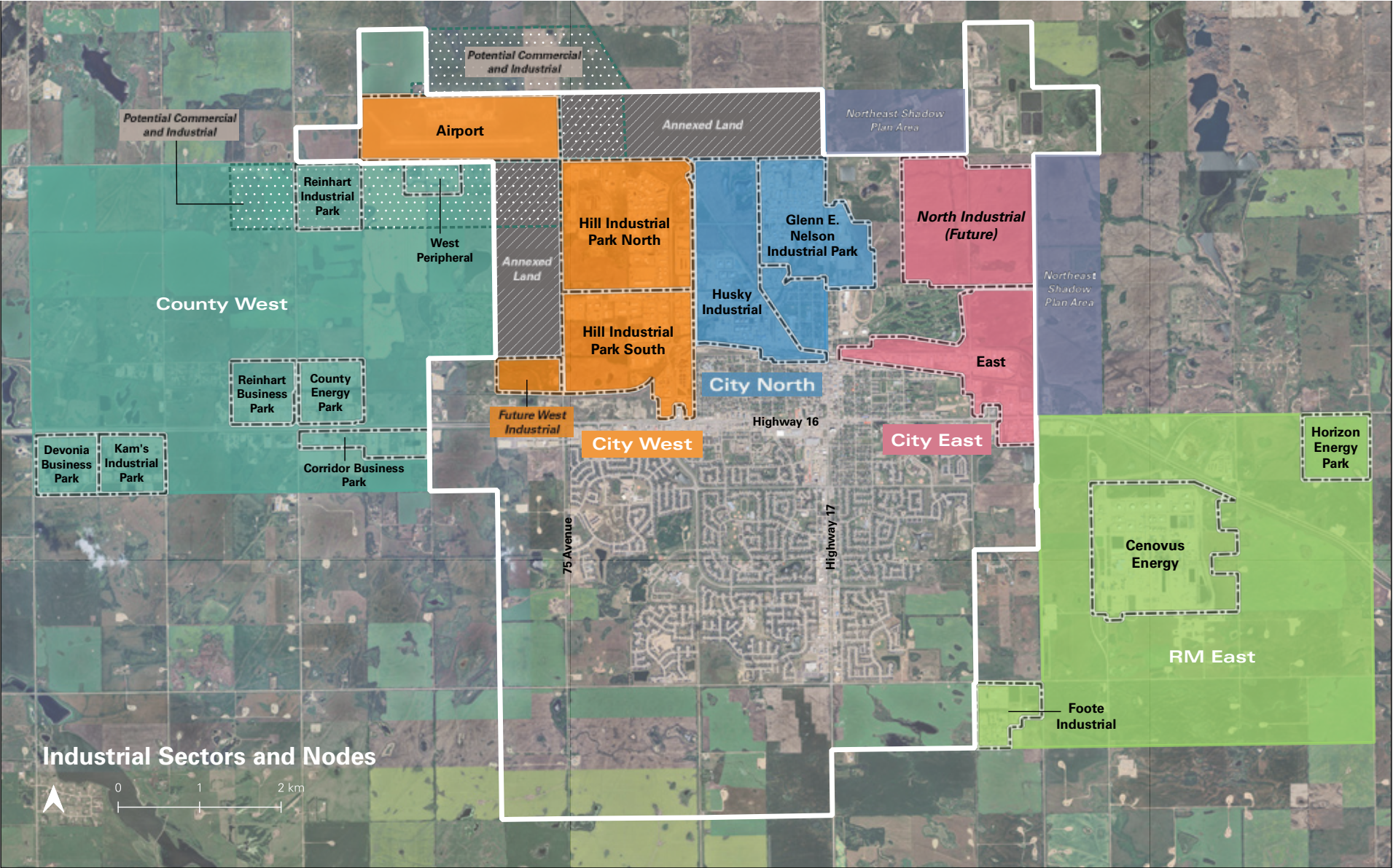


Figure 4-2. Relationship Between the Total Number of Businesses and Total Number of Employees in all of Lloydminster's Industrial Nodes

(Source: FBM)

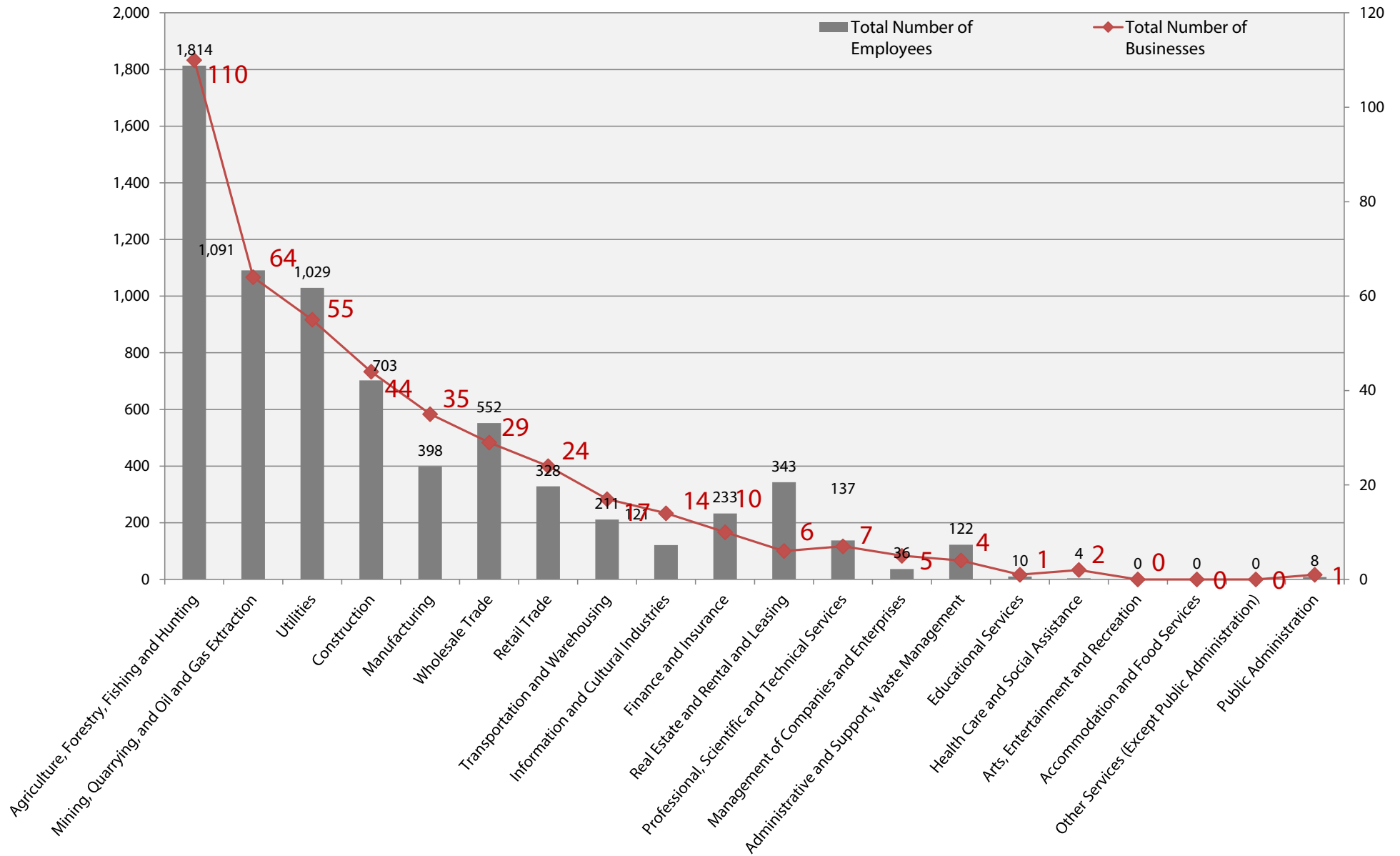


Figure 4-3. Distribution of Employment by Node

(Source: FBM)

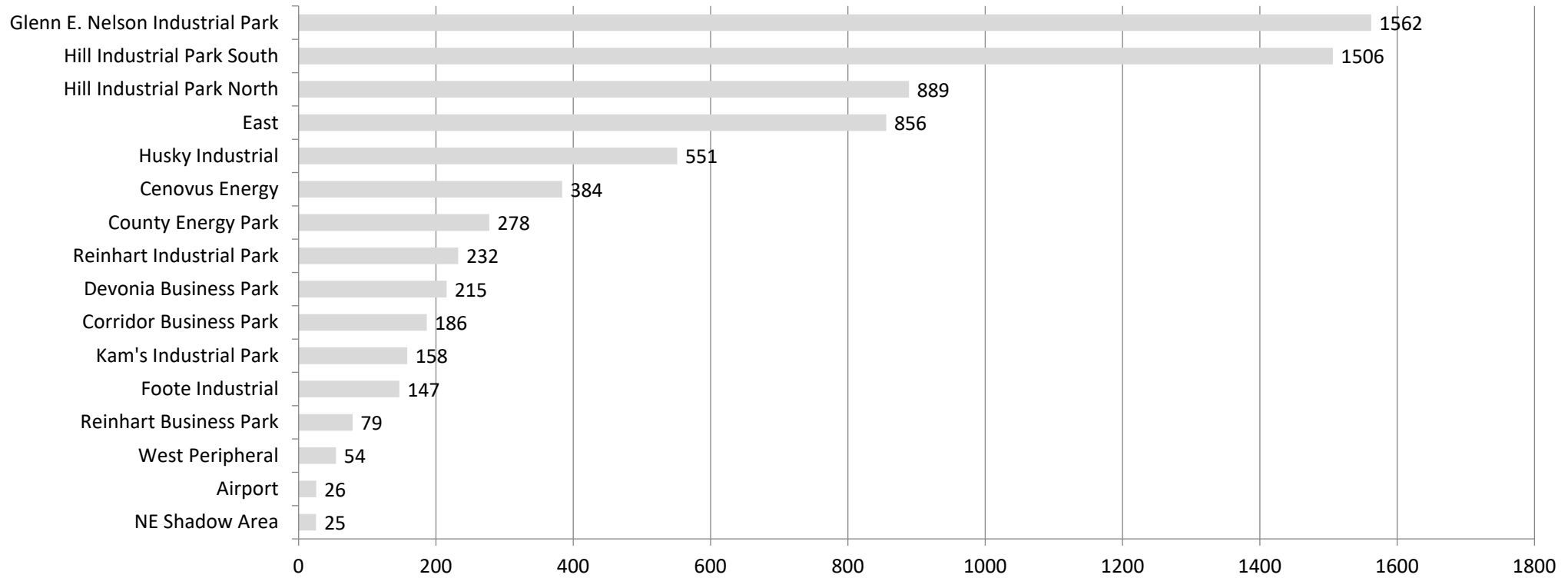
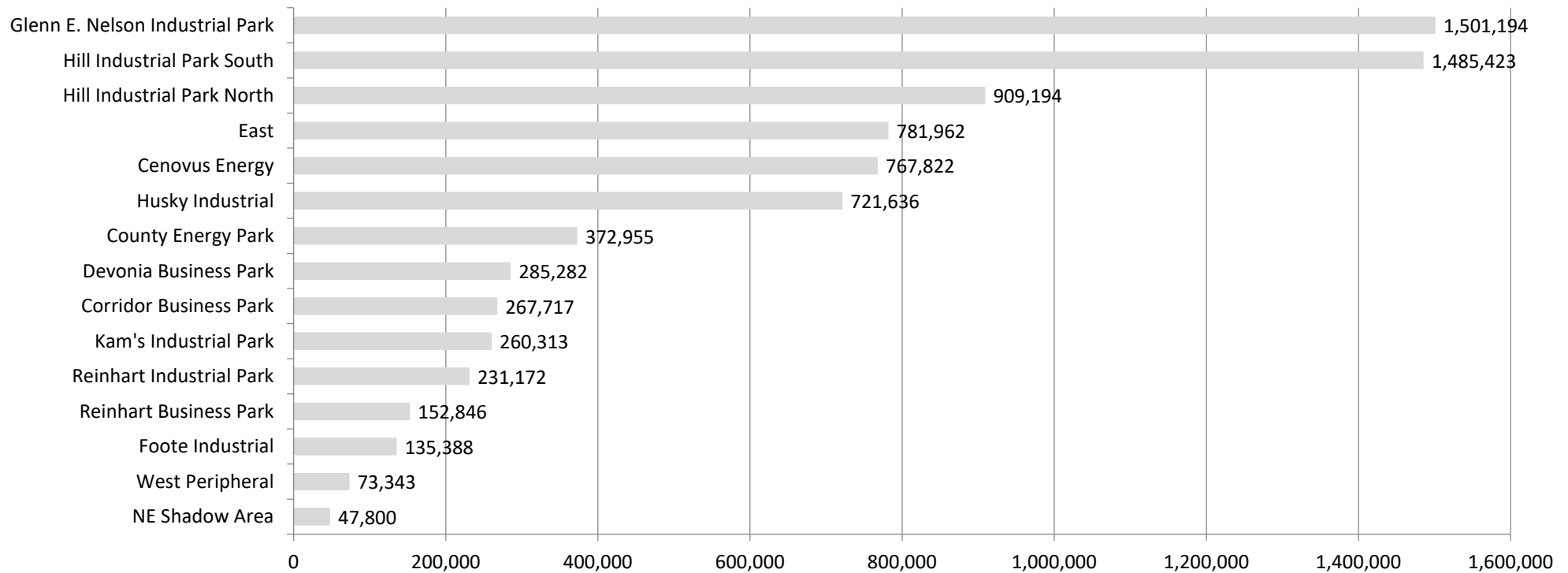


Figure 4-4. Distribution of Building Square Footage By Node (excl airport lands)

(Source: FBM)





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4.6 City North Sector

The map shown in **Figure 4-6** provides a visual overview of Lloydminster North Sector's inventory.

Specific nodes in the North Sector are:

- Husky Industrial Park
- Glenn E. Nelson Industrial Park

Table 4-3 summarizes the North Sector while **Tables 4-4 & 4-5** detail the inventory of each node, including vacancy, business count, percentage share of primary business uses, and NAICS categories. Visually, **Figures 4-5 to 4-10** illustrate the composition and mix of each of the respective nodes within the City North Sector.

Top Industries (by NAICS Code)

1. Mining & Quarrying - 27 businesses & 658 employees
2. Construction - 19 businesses & 188 employees
3. Other Services (Except Public Admin) - 18 businesses & 339 employees

Miscellaneous Observations:

- While there are a few undeveloped parcels in Husky Industrial, City North Sector appears to be mostly filled with the existing businesses.
- Glenn E. Nelson had a greater variety of business types within the node than many of the other nodes. The NAICS categories of the businesses included agriculture, construction, manufacturing, retail trade, health care, and recreation.
- Many buildings in the Glenn E. Nelson Industrial Park are multi-tenant buildings contributing to one of the areas with the most efficient use of lands
- The Area north and east of the airport in the vicinity the Glen E Nelson Industrial Park has been recommended as 'commercial/ industrial' uses as has the land to the east and northeast of the Glen E Nelson Industrial Park.

Table 4-3. City North Sector Industrial Inventory Summary by Node

(Source: FBM and City of Lloydminster)

	Husky Industrial Park	Glenn E. Nelson Industrial Park
Total Gross Land Area (ac)	482	323
Estimated Total Building Space (sq. ft.)	721,636	1,501,194
Estimated Occupied Industrial Site Coverage Ratio	5.7%	10.7%
Total existing vacant land without buildings	192	2
Total existing vacant building space	4,770	91,455
Number of Businesses	23	112
Number of Industrial Employees (est)	551	1,562
Employees per Developed Acre (Est)	1.9	4.9



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CLASSIC



Figure 4-5. City North Sector Summary Inventory Map
(Source: FBM with parcel data provided by Lloydminster)

City North Sector
Business Inventory

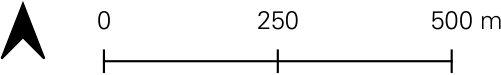
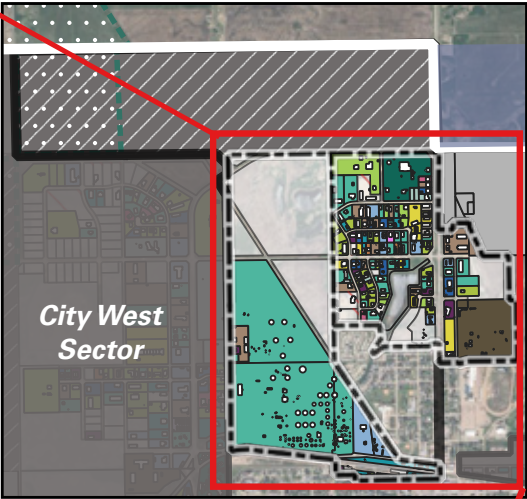
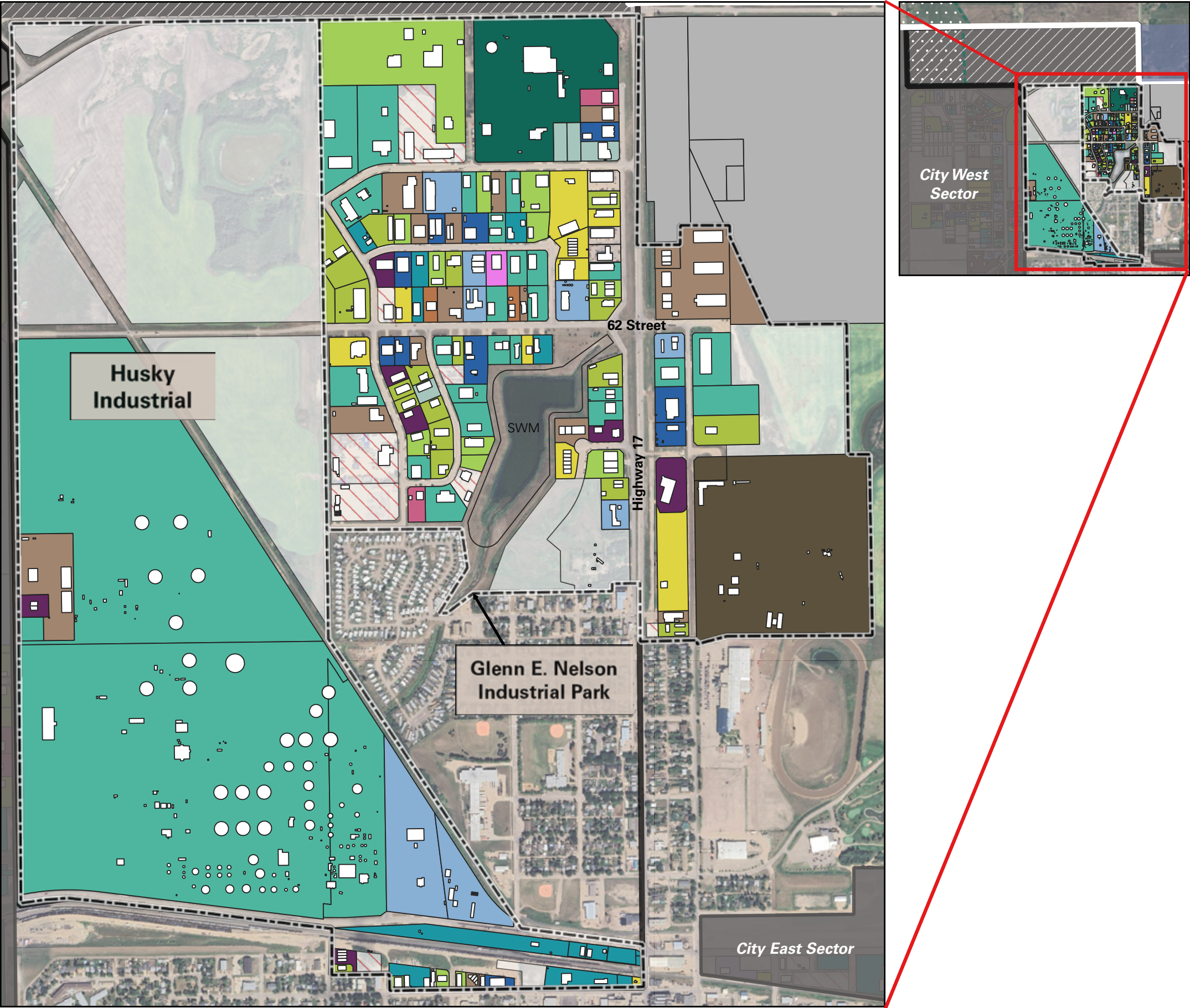


Figure 4-6. Husky Industrial Park Node Inventory by NAICS Industry
(Source: FBM with parcel data provided by Lloydminster)

Husky Industrial
Nodal Business Inventory

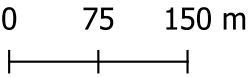
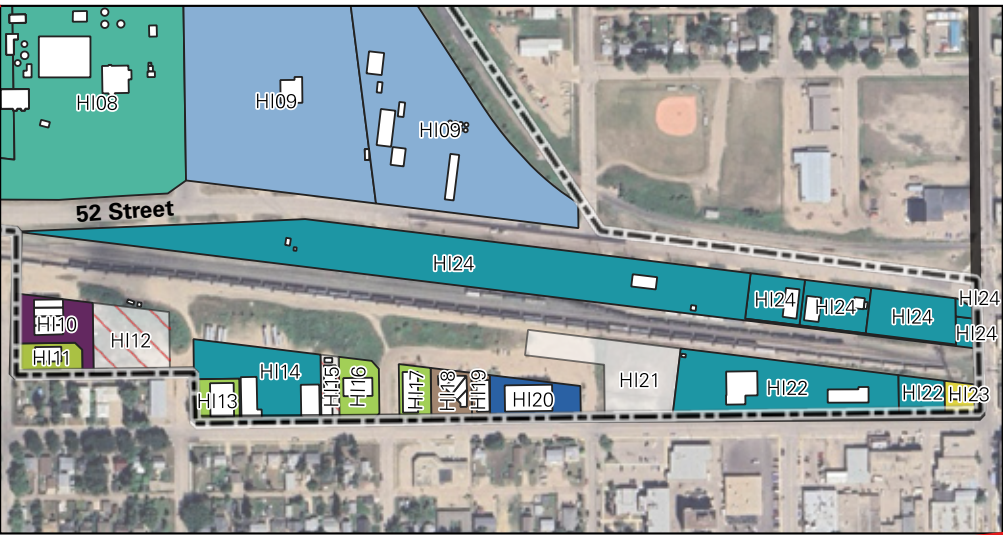
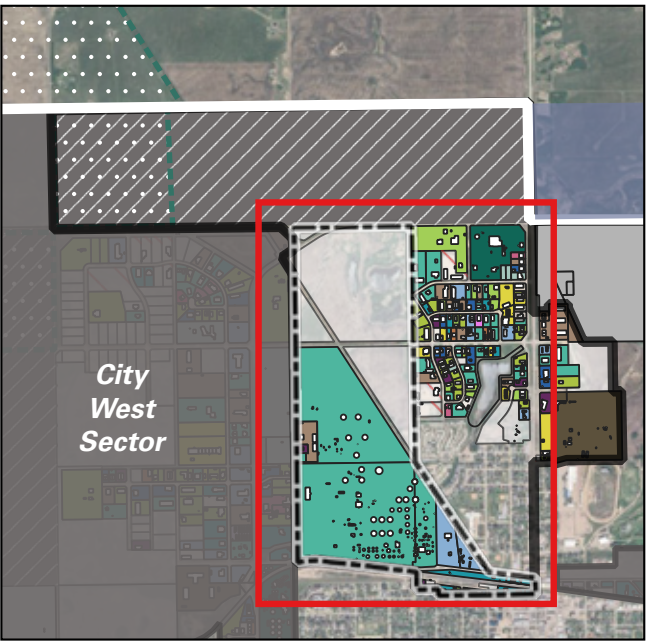
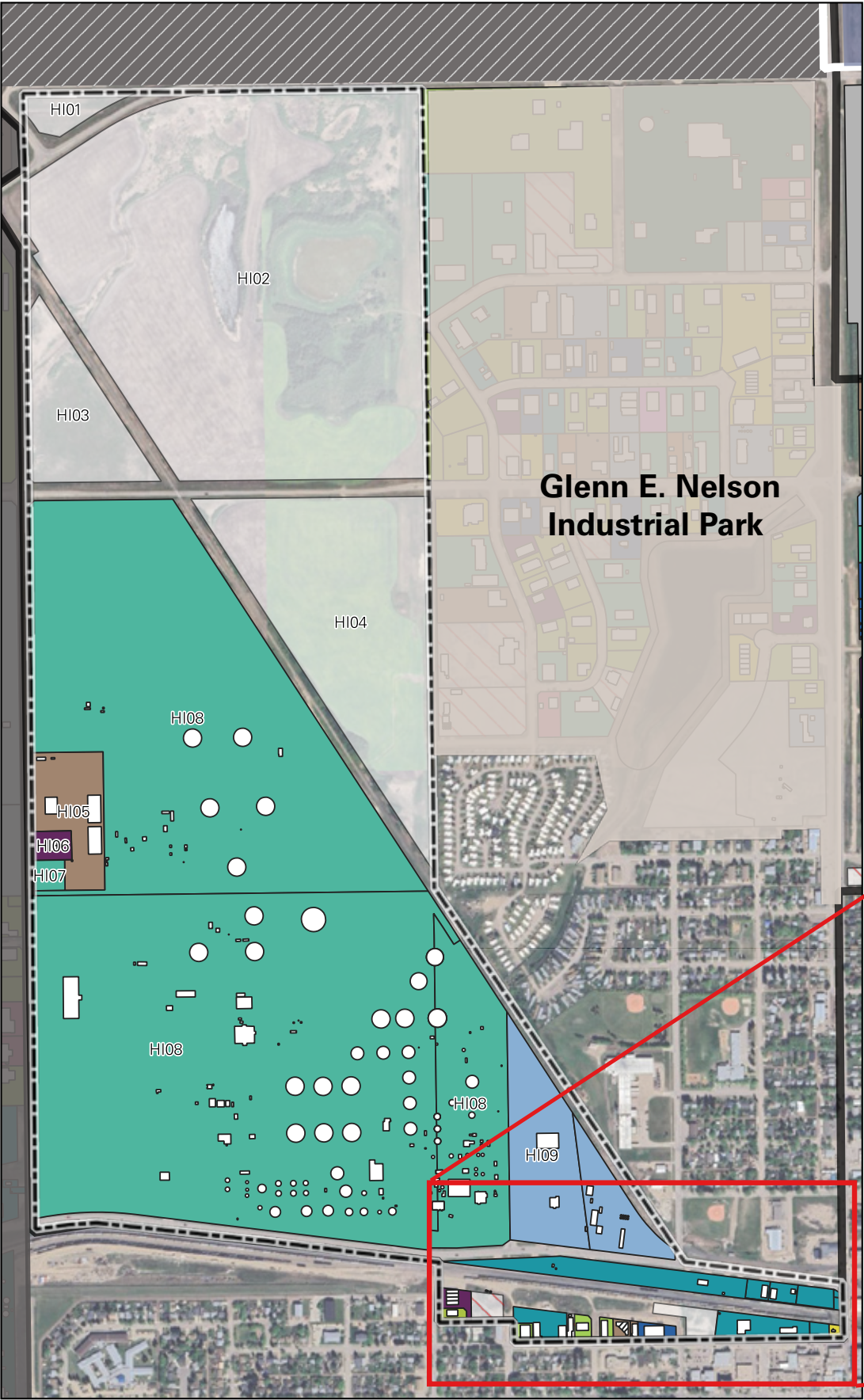


Table 4-4. Husky Industrial Park Business Inventory
(Source: FBM)

Parcel #	Business Name	Civic	Street Address	Land Use	Lot Area (Acres)	Total Bldg Area (inc outbldgs) - sq. ft.	NAICS Code	NAICS Category
HI01			59 67 Street	Public Utility	2.87			
HI02			67 Street 55 Avenue	Cenovus Energy	129.33			
HI03			67 Street 55 Avenue	Cenovus Energy	13.41			
HI04			55 59 Street	Cenovus Energy	43.89			
HI05			5701 59 Avenue	Auto body shop	7.64	41,514	81	Other Services (Except Public Administration)
HI06			5701 59 Avenue		1.07	4,557		Mining, Quarrying, and Oil and Gas Extraction
HI06			5701 59 Avenue	Oil and gas extraction		0	21	Mining, Quarrying, and Oil and Gas Extraction
HI06			5701 59 Avenue	Bookkeeping service		0	54	Professional, Scientific and Technical Services
HI07			5617 59 Avenue	Oil and gas extraction substation	0.92	0	21	Mining, Quarrying, and Oil and Gas Extraction
HI08			5650 52 Street	Oil and gas extraction	248.92	562,843	21	Mining, Quarrying, and Oil and Gas Extraction
HI09			5310 52 Street	Gasoline station	18.00	34,298	44-45	Retail Trade
HI10			5115 55 Avenue	Lawn care service		0	56	Administrative and Support, Waste Management and Remediation Services
HI10			5115 55 Avenue		0.66	7,660		Construction
HI10			5115 55 Avenue	General contractor	0.00	0	23	Construction
HI10		F	5115 55 Avenue	Pet store	0.00	0	44-45	Retail Trade
HI10			5115 55 Avenue	Bookkeeping service	0.00	0	54	Professional, Scientific and Technical Services
HI11			5109 55 Avenue	Plumbing service	0.35	2,901	23	Construction
HI12			51 54 Avenue	C1 Commercial	0.87	0		
HI13			5316 51 Street	Welding and machine shop	0.35	6,098	31-33	Manufacturing
HI14			5314 51 Street	Truck transportation	1.32	9,905	48-49	Transportation and Warehousing
HI15			5306 51 Street		0.21	4,770		
HI16			5302 51 Street	Food manufacturing	0.42	4,005	31-33	Manufacturing
HI17			5220 51 Street	Print shop	0.30	4,698	31-33	Manufacturing
HI18			5214 51 Street		0.35	4,347	44-45	Retail Trade
HI18		4	5214 51 Street	Convenience store		0	44-45	Retail Trade
HI18		6	5214 51 Street	Truck drivers training		0	61	Educational Services
HI18		3	5214 51 Street	Game store		0	71	Arts, Entertainment and Recreation
HI18			5214 51 Street	Hair salon		0	81	Other Services (Except Public Administration)
HI19			5212 51 Street	Auto repair and maintenance service	0.14	3,112	81	Other Services (Except Public Administration)
HI20			5202 51 Street	Second hand store	0.60	9,467	41	Wholesale Trade
HI21			51 52 Avenue	I1 Light Industrial	1.27	0		
HI22			5010 51 Street	Shipping service	2.35	11,442	48-49	Transportation and Warehousing
HI23					0.16	329		
HI24			5104 SK-17	CN Rail Spur Yards	6.78	9,690	48-49	Transportation and Warehousing
	TOTAL			Occupied Land	290.5	721,636		

Figure 4-7. Glenn E. Nelson Industrial Park Node Inventory by NAICS Industry - Part 1
(Source: FBM with parcel data provided by Lloydminster)

Glenn E. Nelson Industrial Park Pt. 1
Nodal Business Inventory

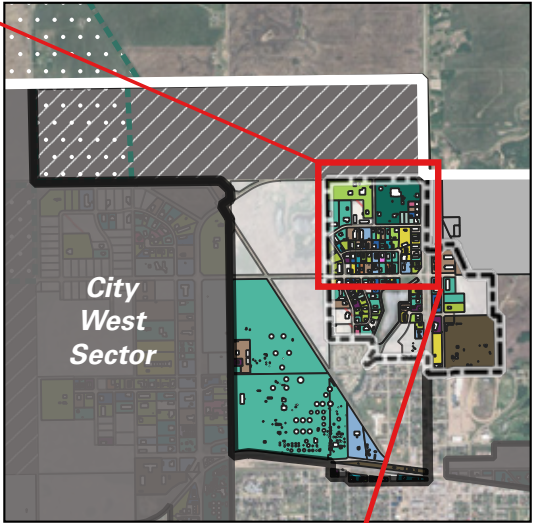
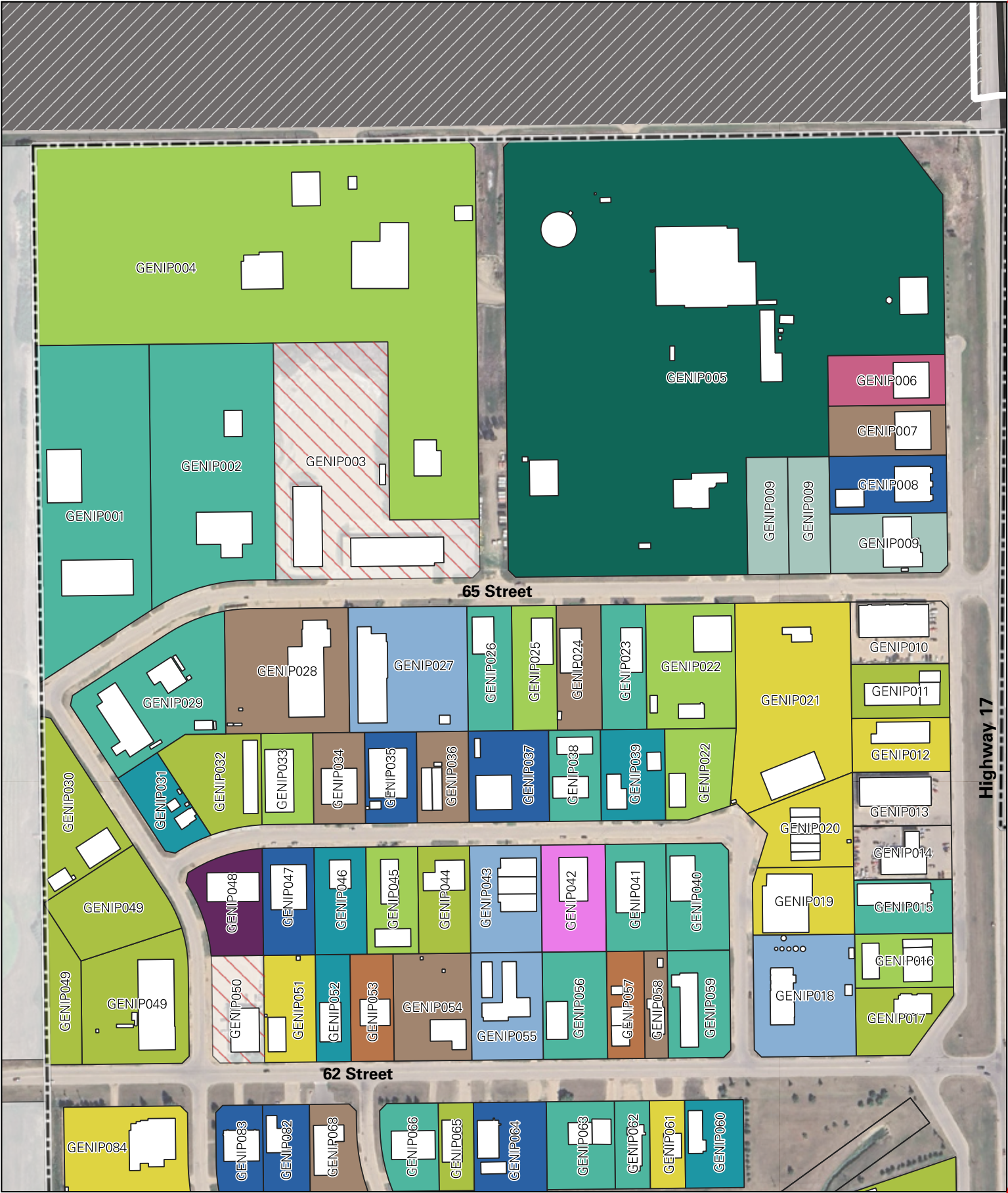


Figure 4-8. Glenn E. Nelson Industrial Park Node Inventory by NAICS Industry - Part 2
(Source: FBM with parcel data provided by Lloydminster)

Glenn E. Nelson Industrial Park Pt. 2
Nodal Business Inventory

- City Boundary
- Glenn E. Nelson Industrial Park Node Boundary

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
- Real Estate and Rental and Leasing
- Professional, Scientific and Technical Services
- Management of Companies and Enterprises
- Administrative 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
- Vacant Lot
- Undeveloped
- User Unknown
- Future Industrial Land
- Annexed Land
- Potential Future Commercial / Industrial Land

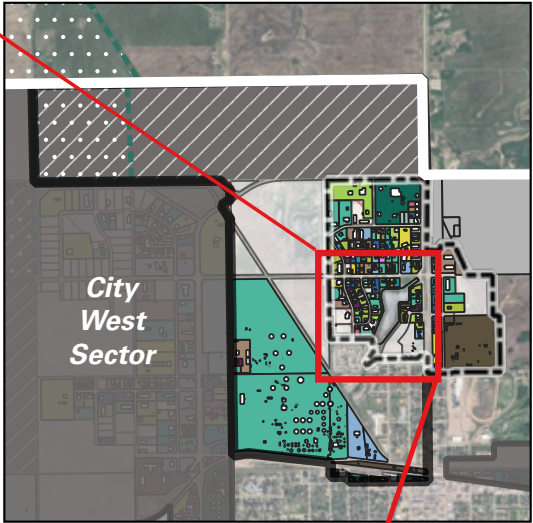
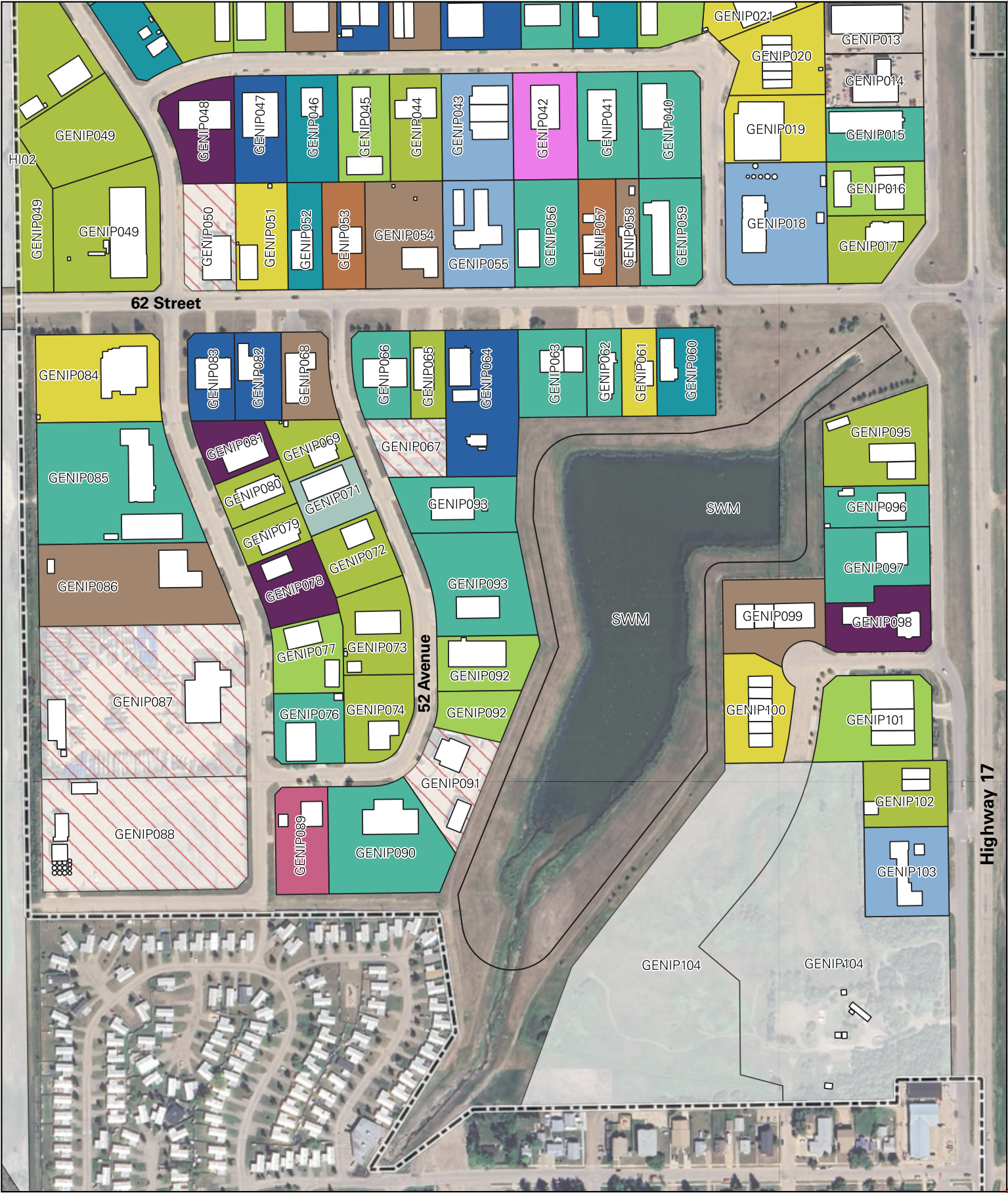
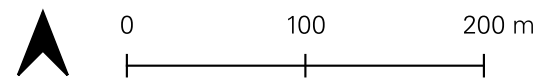


Figure 4-9. Glenn E. Nelson Industrial Park Node Inventory by NAICS Industry - Part 3
(Source: FBM with parcel data provided by Lloydminster)

Glenn E. Nelson Industrial Park Pt. 3
Nodal Business Inventory



Table 4-5. Glenn E. Nelson Industrial Park Business Inventory
(FBM)

Parcel #	Business Name	Civic	Street Address	Land Use	Lot Area (Acres)	Total Bldg Area (inc outbldgs) - sq. ft.	NAICS Code	NAICS Category	NAICS Sub-Code
GENIP001			5222 65 Street	Services to oil and gas extraction	6.11	34,519	21 Mining, Quarrying, and Oil and Gas Extraction		213
GENIP002			5212 65 Street	Oil and gas extraction	5.46	20,188	21 Mining, Quarrying, and Oil and Gas Extraction		211
GENIP003			5202 65 Street		5.81	39,758			
GENIP004			6506 52 Avenue	Metal fabrication	18.78	54,609	31-33 Manufacturing		332
GENIP005			6614 50 Avenue	Services to agriculture	27.93	106,640	11 Agriculture, Forestry, Fishing and Hunting		115
GENIP006			6606 50 Avenue	Waste management	1.06	10,007	56 Administrative and Support, Waste Management and Remediation Services		562
GENIP007			6602 50 Avenue	Property maintenance service	1.06	10,705	81 Other Services (Except Public Administration)		811
GENIP008			6506 50 Avenue	Electric motor store	1.21	14,318	41 Wholesale Trade		415
GENIP009			6502 50 Avenue		3.00	13,549	22 Utilities		221
GENIP010			6314 50 Avenue		0.00	0			
GENIP011			6310 50 Avenue			0			
GENIP011			6310 50 Avenue			0			
GENIP011			6310 50 Avenue	Construction		9,489	23 Construction		236
GENIP011			6310 50 Avenue		0.95	0			
GENIP012			6306 50 Avenue		0.95	9,330			
GENIP013			6302 50 Avenue		0.00	0			
GENIP014			6214 50 Avenue		0.00	0			
GENIP015			6210 50 Avenue	Oil and gas extraction	0.95	12,447	21 Mining, Quarrying, and Oil and Gas Extraction		211
GENIP016			6206 50 Avenue			0			
GENIP016			6206 50 Avenue		0.95	14,411	31-33 Manufacturing		
GENIP016		2	6206 50 Avenue	Signage manufacturing		0	31-33 Manufacturing		339
GENIP016			6206 50 Avenue	Martial arts school		0	61 Educational Services		611
GENIP017			6202 50 Avenue	Electrician	0.96	5,698	23 Construction		238
GENIP018		2	6205 51 Avenue	Hot tub sales	2.22	12,735	44-45 Retail Trade		459
GENIP019			6209 51 Avenue		1.22	21,605			
GENIP020			6211 51 Avenue		1.29	12,018	81 Other Services (Except Public Administration)		
GENIP020		1	6211 51 Avenue			0			
GENIP020		2	6211 51 Avenue			0			
GENIP020		3	6211 51 Avenue			0			
GENIP020			6211 51 Avenue			0			
GENIP020		5	6211 51 Avenue	Truck repair		0	81 Other Services (Except Public Administration)		811
GENIP020		6	6211 51 Avenue	Welder repair		0	81 Other Services (Except Public Administration)		811
GENIP021			5007 65 Street		4.03	16,527			
GENIP022			5101 65 Street	Fabrication and construction	3.06	19,041	31-33 Manufacturing		332
GENIP023			5103 65 Street	Services to oil and gas extraction	1.00	7,552	21 Mining, Quarrying, and Oil and Gas Extraction		213
GENIP024			5107 65 Street	Dog training	1.00	7,850	81 Other Services (Except Public Administration)		812
GENIP025			5109 65 Street	Welding	1.00	7,827	31-33 Manufacturing		332
GENIP026			5111 65 Street	Services to oil and gas extraction	1.00	6,330	21 Mining, Quarrying, and Oil and Gas Extraction		213
GENIP027			5205 65 Street	Truck accessories dealers	2.67	22,154	44-45 Retail Trade		441
GENIP028			5205 65 Street	Truck repair	2.78	25,860	81 Other Services (Except Public Administration)		811
GENIP029					2.72	24,525	21 Mining, Quarrying, and Oil and Gas Extraction		
GENIP029			5211 65 Street	Services to oil and gas extraction		0	21 Mining, Quarrying, and Oil and Gas Extraction		213
GENIP029			5211 65 Street	Excavating contractor		0	23 Construction		238
GENIP030			6306 53 Avenue	Well drilling contractor	1.62	9,933	23 Construction		238
GENIP031			5212 63 Street	Truck transportation	0.80	3,163	48-49 Transportation and Warehousing		484
GENIP032			5210 63 Street	Insulation contractor	1.39	8,440	23 Construction		238
GENIP033			5208 63 Street	Coating service	0.85	14,075	31-33 Manufacturing		325
GENIP034			5206 63 Street	Animal shelter	0.85	10,035	81 Other Services (Except Public Administration)		812
GENIP035			5204 63 Street		0.85	15,514	41 Wholesale Trade		
GENIP035		1	5204 63 Street	Industrial equipment supplier		0	41 Wholesale Trade		417
GENIP035			5204 63 Street	Boxing gym		0	61 Educational Services		611
GENIP036			5202 63 Street		0.85	7,016	54 Professional, Scientific and Technical Services		
GENIP036			5202 63 Street	Home inspection		0	54 Professional, Scientific and Technical Services		541
GENIP036		A	5202 63 Street	Weight loss service		0	81 Other Services (Except Public Administration)		812
GENIP037			5114 63 Street	Construction equipment supplier	1.32	10,554	41 Wholesale Trade		417
GENIP038			5110 63 Street	Oil and gas extraction	0.85	10,809	21 Mining, Quarrying, and Oil and Gas Extraction		211
GENIP039			5106 63 Street	Truck transportation	1.05	6,871	48-49 Transportation and Warehousing		484
GENIP040			5101 63 Street	Oil and gas extraction	1.20	8,904	21 Mining, Quarrying, and Oil and Gas Extraction		211
GENIP041			5105 63 Street	Oil and gas extraction	1.17	11,434	21 Mining, Quarrying, and Oil and Gas Extraction		211

Parcel #	Business Name	Civic	Street Address	Land Use	Lot Area (Acres)	Total Bldg Area (inc outbldgs) - sq. ft.	NAICS Code	NAICS Category	NAICS Sub-Code
GENIP042			5109 63 Street	Telecommunications	1.24	9,821	51	Information and Cultural Industries	517
GENIP043			5113 63 Street		1.38	15,696	44-45	Retail Trade	
GENIP043		B	5113 63 Street	Electrical supply store		0	44-45	Retail Trade	444
GENIP043		C	5113 63 Street	Auto parts store		0	44-45	Retail Trade	441
GENIP043			5113 63 Street	Engineering services		0	54	Professional, Scientific and Technical Services	541
GENIP044			5201 63 Street	Electrician	1.00	8,751	23	Construction	238
GENIP045			5205 63 Street	Tool manufacturing	1.00	11,315	31-33	Manufacturing	332
GENIP046			5209 63 Street	Truck transportation	1.00	4,843	48-49	Transportation and Warehousing	484
GENIP047			5213 63 Street	Electrical supply store	1.00	12,601	41	Wholesale Trade	416
GENIP048			5217 63 Street	Interior design service	1.15	11,832	54	Professional, Scientific and Technical Services	541
GENIP049			6302 53 Avenue	Contractor	4.77	26,709	23	Construction	238
GENIP050			5218 62 Street		0.99	9,821			
GENIP051			5214 62 Street		1.00	5,022			
GENIP052			5210 62 Street	Distribution service	0.67	6,618	48-49	Transportation and Warehousing	493
GENIP053			5208 62 Street	Recreational facility	0.83	6,223	71	Arts, Entertainment and Recreation	713
GENIP054			5202 62 Street	Auto repair and maintenance	1.50	7,173	81	Other Services (Except Public Administration)	811
GENIP055			5114 62 Street	Tire dealership	1.38	14,318	44-45	Retail Trade	441
GENIP056			5110 62 Street	Oil and gas extraction	1.24	6,365	21	Mining, Quarrying, and Oil and Gas Extraction	211
GENIP057			5108 62 Street		0.72	6,391	31-33	Manufacturing	
GENIP057			5108 62 Street	Engraving service		0	31-33	Manufacturing	332
GENIP057		1	5108 62 Street	Recreational facility		0	71	Arts, Entertainment and Recreation	713
GENIP058			5106 62 Street	Auto repair and maintenance	0.45	4,706	81	Other Services (Except Public Administration)	811
GENIP059			5102 62 Street	Oil and gas extraction	1.20	11,230	21	Mining, Quarrying, and Oil and Gas Extraction	211
GENIP060			5101 62 Street	Warehousing	0.93	5,185	48-49	Transportation and Warehousing	493
GENIP061			5103 62 Street		0.56	3,454			
GENIP062			5105 62 Street	Services to oil and gas extraction	0.56	4,725	21	Mining, Quarrying, and Oil and Gas Extraction	213
GENIP063			5107 62 Street		1.08	7,861			
GENIP063		1	5107 62 Street	Drilling contractor		0	21	Mining, Quarrying, and Oil and Gas Extraction	213
GENIP063			5107 62 Street	Auto repair and maintenance		0	81	Other Services (Except Public Administration)	811
GENIP064			5109 62 Street	Industrial equipment supplier	1.91	10,776	41	Wholesale Trade	417
GENIP065			5111 62 Street	Plumbing service	0.55	6,633	23	Construction	238
GENIP066			5113 62 Street	Oil and gas extraction	0.88	9,796	21	Mining, Quarrying, and Oil and Gas Extraction	211
GENIP067			6015 52 Avenue		0.74	0			
GENIP068			5201 62 Street	Pet grooming service	0.78	8,838	81	Other Services (Except Public Administration)	812
GENIP069			6016 52 Avenue	Concrete contractor	0.67	4,295	23	Construction	238
GENIP071			6014 52 Avenue	Energy distributor	0.74	7,502	22	Utilities	221
GENIP072			6012 52 Avenue	Construction	0.86	4,800	23	Construction	238
GENIP073			6006 52 Avenue	Oilfield construction and maintenance	1.13	9,514	23	Construction	238
GENIP074			6002 52 Avenue	Masonry contractor	1.00	5,829	23	Construction	238
GENIP076			6001 53 Avenue	Oil and gas extraction	0.89	9,548	21	Mining, Quarrying, and Oil and Gas Extraction	211
GENIP077			6007 53 Avenue	Metal fabrication	0.93	9,080	31-33	Manufacturing	332
GENIP078			6011 53 Avenue	Environmental consulting services	0.91	4,005	54	Professional, Scientific and Technical Services	541
GENIP079			6007 53 Avenue	Construction	0.51	7,328	23	Construction	238
GENIP080			6015 53 Avenue	Electrician	0.61	7,620	23	Construction	238
GENIP081			6017 53 Avenue	Engineersing consultant	0.69	7,462	54	Professional, Scientific and Technical Services	541
GENIP082			5203 62 Street	Plumbing supplier	0.74	5,163	41	Wholesale Trade	416
GENIP083			5205 62 Street	Industrial equipment supplier	0.73	8,722	41	Wholesale Trade	417
GENIP084			5301 62 Street		1.96	16,494			
GENIP085			6010 53 Avenue	Oil and gas extraction	3.19	27,560	21	Mining, Quarrying, and Oil and Gas Extraction	211
GENIP086			6006 53 Avenue	Truck repair	2.73	11,075	81	Other Services (Except Public Administration)	811
GENIP087			6002 53 Avenue		5.62	23,482			
GENIP088			5902 53 Avenue		4.14	8,822			
GENIP089			5205 60 Street	Vegetation management and weed co	1.01	5,143	56	Administrative and Support, Waste Management and Remediation Services	561
GENIP090			5201 60 Street	Oil and gas extraction	2.14	13,164	21	Mining, Quarrying, and Oil and Gas Extraction	211
GENIP091			6001 52 Avenue		1.14	9,571			
GENIP092			6007 52 Avenue	Welding	1.55	11,791	31-33	Manufacturing	332
GENIP093			6013 52 Avenue	Services to oil and gas extraction	3.03	18,477	21	Mining, Quarrying, and Oil and Gas Extraction	213
GENIP095			6010 50 Avenue		1.58	11,859	41	Wholesale Trade	
GENIP095			6010 50 Avenue	Electrician		0	23	Construction	238

Parcel #	Business Name	Civic	Street Address	Land Use	Lot Area (Acres)	Total Bldg Area (inc outbldgs) - sq. ft.	NAICS Code	NAICS Category	NAICS Sub-Code
GENIP095		A	6010 50 Avenue	Safety equipment supplier		0	41 Wholesale Trade		417
GENIP096			6006 50 Avenue		0.79	7,086	21 Mining, Quarrying, and Oil and Gas Extraction		
GENIP096		B	6006 50 Avenue			0			
GENIP096		A	6006 50 Avenue	Services to oil and gas extraction		0	21 Mining, Quarrying, and Oil and Gas Extraction		213
GENIP097			6004 50 Avenue	Oil and gas extraction	1.26	8,055	21 Mining, Quarrying, and Oil and Gas Extraction		211
GENIP098			6002 50 Avenue	Animal hospital	1.09	8,043	54 Professional, Scientific and Technical Services		541
GENIP099			5006 60 Street		1.33	15,111	81 Other Services (Except Public Administration)		
GENIP099			5006 60 Street			0			
GENIP099		B	5006 60 Street	Truck diesel parts		0	44-45 Retail Trade		441
GENIP099			5006 60 Street	Auto repair and maintenance		0	81 Other Services (Except Public Administration)		811
GENIP100			5194 51 Avenue		1.23	13,037	56 Administrative and Support, Waste Management and Remediation Services		
GENIP100		1	5194 51 Avenue			0			
GENIP100		2	5194 51 Avenue			0			
GENIP100		3	5194 51 Avenue			0			
GENIP100		5	5194 51 Avenue			0			
GENIP100		6	5194 51 Avenue	Energy distributor		0	22 Utilities		221
GENIP100		4	5194 51 Avenue			0	56 Administrative and Support, Waste Management and Remediation Services		562
GENIP101			5984 50 Avenue		1.72	0			
GENIP101		101	5984 50 Avenue			0			
GENIP101		105	5984 50 Avenue			0			
GENIP101		107	5984 50 Avenue	Fastener manufacturing		9,556	31-33 Manufacturing		332
GENIP102			5912 50 Avenue		1.00	6,305	23 Construction		
GENIP102			5912 50 Avenue	Construction		0	23 Construction		238
GENIP102			5912 50 Avenue	Land and environmental consulting		0	54 Professional, Scientific and Technical Services		541
GENIP103			5906 50 Avenue	Gas station	1.35	9,320	44-45 Retail Trade		457
GENIP104			60 51 Avenue		18.35	2,622			
GENIP105			5703 50 Avenue		0.27	0			
GENIP106			5704 49 Avenue	Roofing service	0.69	6,706	23 Construction		238
GENIP107			5705 50 Avenue	Auto detailing	0.60	11,857	81 Other Services (Except Public Administration)		811
GENIP108			5709 50 Avenue		5.01	3,153			
GENIP109			5905 49 Avenue	Public works department building	51.27	54,488	91 Public Administration		913
GENIP110			5925 49 Avenue	Water mill	1.27	0	91 Public Administration		913
GENIP111			5921 50 Avenue	Laboratory	2.70	20,557	54 Professional, Scientific and Technical Services		541
GENIP112			6005 50 Avenue	Janitorial equipment supplier	2.99	23,284	41 Wholesale Trade		417
GENIP113			6001 49 Avenue	Construction	3.23	5,936	23 Construction		238
GENIP114			5905 49 Avenue		22.64	0			
GENIP115			6107 49 Avenue	Oil and gas extraction	6.62	29,973	21 Mining, Quarrying, and Oil and Gas Extraction		211
GENIP116			6106 49 Avenue	Oil and gas extraction	1.42	15,353	21 Mining, Quarrying, and Oil and Gas Extraction		211
GENIP117			6110 49 Avenue		1.24	0			
GENIP117		B	6110 49 Avenue			0			
GENIP117		A	6110 49 Avenue	Gas station		5,162	44-45 Retail Trade		457
GENIP118					13.70	104,137	21 Mining, Quarrying, and Oil and Gas Extraction		
GENIP118			5209 50 Avenue			0			
GENIP118		C	6201 50 Avenue	Industrial gas distributor		0	21 Mining, Quarrying, and Oil and Gas Extraction		211
GENIP118			6205 50 Avenue	Oil field equipment distributor		0	21 Mining, Quarrying, and Oil and Gas Extraction		211
GENIP118			6209 50 Avenue	Equipment wholesaler		0	41 Wholesale Trade		417
GENIP118		E	6209 50 Avenue	Security guard services		0	56 Administrative and Support, Waste Management and Remediation Services		561
GENIP118		A	6201 50 Avenue	Technical rescue and emergency services		0	62 Health Care and Social Assistance		621
GENIP118			6201 50 Avenue	Truck wash and storage		0	81 Other Services (Except Public Administration)		811
GENIP118			6303 50 Avenue			0			
		TOTAL			Occupied Land	321.1	1,501,194		

4.7 City West Sector

The map shown in **Figure 4-11** provides a visual overview of Lloydminster's West Sector's inventory.

Nodes in the North Sector are:

- Hill Industrial North
- Hill Industrial South
- Airport

Table 4-6 summarizes the North Sector while **Tables 4-7, 4-8 & 4-9** detail the inventory of each node, including vacancy, business count, percentage share of primary business uses, and NAICS categories. Visually, **Figures 4-11 to 4-14** illustrate the composition and mix of each of the respective nodes within the City West Sector

Top Industries (by NAICS Code)

1. Mining & Quarrying - 18 businesses & 132 employees
2. Transportation & Warehousing - 25 business & 126 employees
3. Retail Trade - 13 businesses & 418 employees

Miscellaneous Observations:

- The combination of city-owned and private lands in the Hill Industrial Nodes provides an excellent opportunity for serviced and investment-ready lands.
- Not surprisingly, the Airport presents a strong opportunity for future growth in supporting aerospace businesses or further transportation related sectors. Opportunities could include the development of a helicopter training and maintenance centre of excellence or perhaps wildfire training.
- Hill Industrial North does include a number of currently vacant spec-built buildings suitable for owner-occupier types of businesses.
- The Hill Industrial South Park includes many older businesses and a larger composition of Manufacturing businesses (18) housing approximately 271 employees.

Table 4-6. City West Sector Industrial Inventory Summary by Node

(Source: FBM and City of Lloydminster)

	Airport	Hill Industrial North	Hill Industrial South
Total Gross Land Area (ac)	8.5	527	435
Estimated Total Building Space (sq. ft.)	n/a	909,194	1,485,423
Estimated Occupied Industrial Site Coverage Ratio	n/a	4.3%	13.7%
Total existing vacant land without buildings (acres)	0	266	184
Total existing vacant building space (sq. ft.)	n/a	99,037	87,816
Number of Businesses	16	54	79
Number of Industrial Employees (est)	26	889	1,506
Employees per Developed Acre (Est)	3.0	1.8	6.0

Figure 4-10. City West Sector Map
(Source: FBM with parcel data provided by Lloydminster)

City West Sector Business Inventory

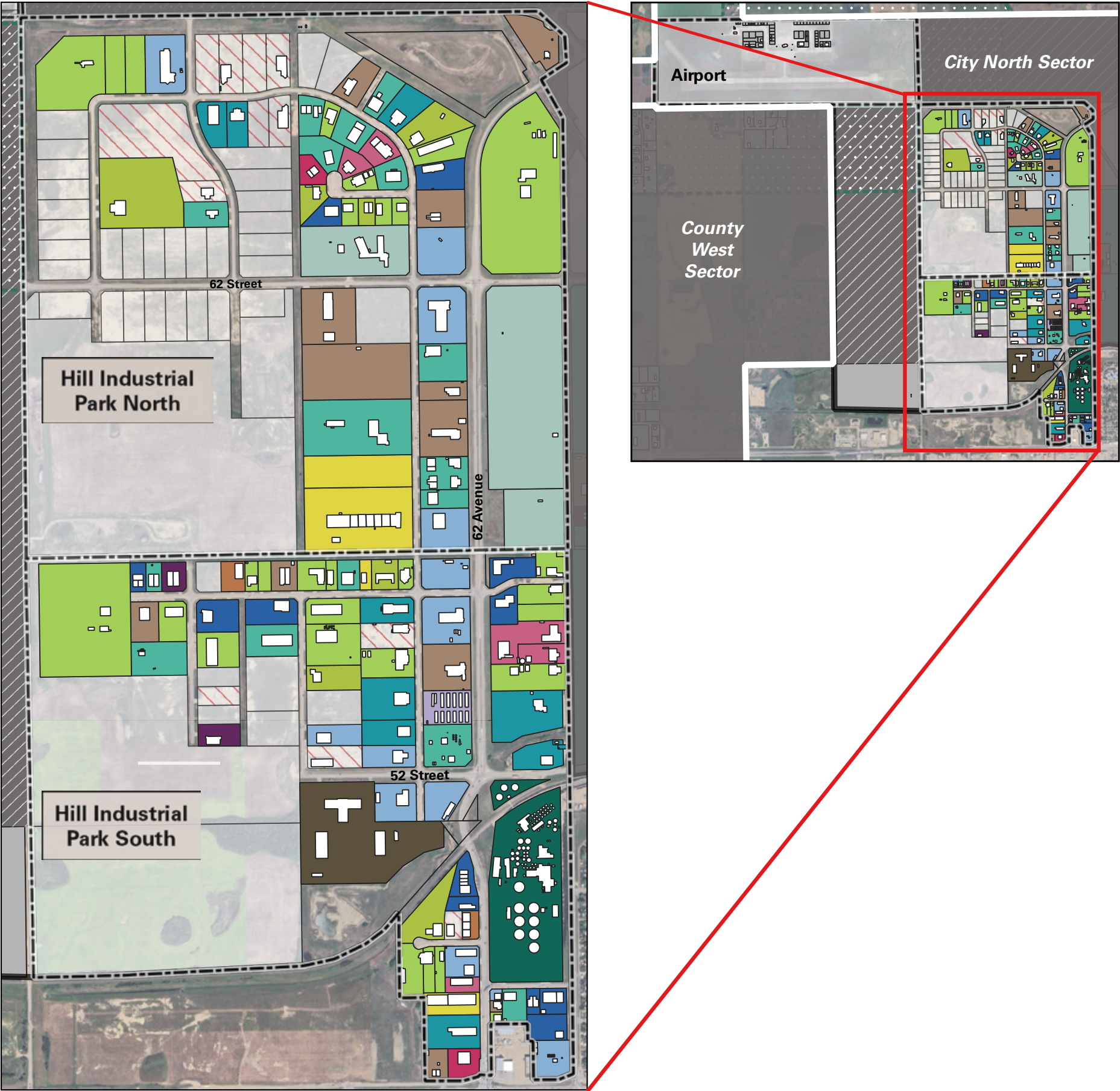


Figure 4-11. Hill Industrial Park NORTH Node Inventory by NAICS Industry
(Source: FBM with parcel data provided by Lloydminster)

Hill Industrial Park North
Nodal Business Inventory



Table 4-7. Hill Industrial Park NORTH Business Inventory
(FBM)

Parcel #	Business Name	Civic	Street Address	Land Use	Lot Area (Acres)	Total Bldg Area (inc outbldgs) - sf	NAICS Code	NAICS Category
HIPN12			6301 63 Avenue		4.0	9,216	21	Mining, Quarrying, and Oil and Gas Extraction
HIPN26			6405 66 Street		2.0	23,011	21	Mining, Quarrying, and Oil and Gas Extraction
HIPN27			6451 66 Street		2.5	20,177	21	Mining, Quarrying, and Oil and Gas Extraction
HIPN29					2.1	15,606	21	Mining, Quarrying, and Oil and Gas Extraction
HIPN17			6415 63 Street Close		1.0	8,594	23	Construction
HIPN49			5702 63 Avenue		23.2	93,146	23	Construction
HIPN50					5.5	54,182	41	Wholesale Trade
HIPN21			6643 63 Street Close		1.5	8,052	61	Educational Services
HIPN07			6452 66 Street	Services to oil and gas extraction	2.0	16,994	21	Mining, Quarrying, and Oil and Gas Extraction
HIPN12		#1	6301 63 Avenue	Well servicing		0	21	Mining, Quarrying, and Oil and Gas Extraction
HIPN22			6544 63 Street Close	Services to oil and gas extraction	2.4	10,655	21	Mining, Quarrying, and Oil and Gas Extraction
HIPN25			6320 63 Avenue	Services to oil and gas extraction	2.0	15,999	21	Mining, Quarrying, and Oil and Gas Extraction
HIPN26			6405 66 Street	Engineering service		0	21	Mining, Quarrying, and Oil and Gas Extraction
HIPN27			6451 66 Street	Services to oil and gas extraction		0	21	Mining, Quarrying, and Oil and Gas Extraction
HIPN29			6605 66 Street	Services to oil and gas extraction			21	Mining, Quarrying, and Oil and Gas Extraction
HIPN37			6308 70 Avenue	Services to oil and gas extraction	2.5	7,597	21	Mining, Quarrying, and Oil and Gas Extraction
HIPN45			6003 63 Avenue	Services to oil and gas extraction	4.0	15,815	21	Mining, Quarrying, and Oil and Gas Extraction
HIPN48			5902 63 Avenue	Services to oil and gas extraction	13.3	38,635	21	Mining, Quarrying, and Oil and Gas Extraction
HIPN50		2	5803 63 Avenue	Services to oil and gas extraction			21	Mining, Quarrying, and Oil and Gas Extraction
HIPN14			6404 66 Avenue	Electricity services	12.0	48,383	22	Utilities
HIPN29		#2	6673 66 Street	Energy service			22	Utilities
HIPN52			5702 59 Avenue	Utility Hill Substation	8.3	772	22	Utilities
HIPN53			5800 59 Avenue	Oil tank storage	34.1	2,038	22	Utilities
HIPN09			6364 66 Street	Services to oil and gas extraction	4.0	13,376	23	Construction
HIPN17		B	6415 63 Street Close	Construction		0	23	Construction
HIPN20			6619 63 Street Close	Property restoration	1.7	9,611	23	Construction
HIPN36			6311 73 Avenue	Construction	12.4	19,467	23	Construction
HIPN49			A 5702 63 Avenue	Rod pumping contractor			23	Construction
HIPN01			7204 66 Street	Concrete supplier	15.1	6,230	31-33	Manufacturing
HIPN10			6302 66 Street	Machinery manufacturing	3.0	28,854	31-33	Manufacturing
HIPN15			6301 63 Street Close	Tool manufacturing	1.0	8,058	31-33	Manufacturing
HIPN16			6371 63 Street Close	Glass and door manufacturing	1.0	6,758	31-33	Manufacturing
HIPN18			6511 63 Street Close	Tool manufacturing	1.0	8,004	31-33	Manufacturing
HIPN24			6302 63 Street Close	Heating contractor	1.3	16,640	31-33	Manufacturing
HIPN28			6525 66 Street	Machinery manufacturing	1.1	11,996	31-33	Manufacturing
HIPN54			6300 59 Avenue	Steel manufacturing	28.1	44,311	31-33	Manufacturing
HIPN11			6401 63 Avenue	Oil field equipment rental	3.0	15,699	41	Wholesale Trade
HIPN19			6609 63 Street Close	Safety equipment supplier	1.7	14,085	41	Wholesale Trade
HIPN50		3A	5803 63 Avenue	Services to oil and gas extraction			41	Wholesale Trade
HIPN50			5803 63 Avenue	Industrial equipment supplier			41	Wholesale Trade
HIPN50			5803 63 Avenue	Industrial equipment supplier			41	Wholesale Trade

Parcel #	Business Name	Civic	Street Address	Land Use	Lot Area (Acres)	Total Bldg Area (inc outbldgs) - sf	NAICS Code	NAICS Category
HIPN02			7004 66 Street	Trailer dealer and repair	5.2	37,548	44-45	Retail Trade
HIPN13			6201 63 Avenue	Gas station	5.0	595	44-45	Retail Trade
HIPN44			6101 63 Avenue	Truck dealer	6.0	42,765	44-45	Retail Trade
HIPN51			5701 63 Avenue	Trailer supply store	4.6	18,006	44-45	Retail Trade
HIPN08			6404 66 Street	Trucking	3.0	15,596	48-49	Transportation and Warehousing
HIPN32			6847 66 Street	Trucking	2.1	14,621	48-49	Transportation and Warehousing
HIPN33			6925 66 Street	Transportation and Warehousing	2.6	20,489	48-49	Transportation and Warehousing
HIPN49			B 5702 63 Avenue	Manufacturing Data processing service			51	Information and Cultural Industries
HIPN50			5801 63 Avenue	Equipment rentals			53	Real Estate and Rental and Leasing
HIPN50			3B 5803 63 Avenue	Engineering consultant			54	Professional, Scientific and Technical Services
HIPN17			A 6415 63 Street Close	Water restoration		0	56	Administrative and Support, Waste Management and Remediation Services
HIPN23			6478 63 Street Close	Waste management	1.4	10,054	56	Administrative and Support, Waste Management and Remediation Services
HIPN26			6405 66 Street	Property restoration		0	56	Administrative and Support, Waste Management and Remediation Services
HIPN21			6643 63 Street Close	Recreation facility		0	61	Educational Services
HIPN50			1A 5803 63 Avenue	Safety training service			61	Educational Services
HIPN06			6513 66 Street	Truck repair	2.5	13,487	81	Other Services (Except Public Administration)
HIPN12			#2 6301 63 Avenue	Services to oil and gas extraction		0	81	Other Services (Except Public Administration)
HIPN27			6451 66 Street	Massage therapist		0	81	Other Services (Except Public Administration)
HIPN42			6601 62 Street	Truck repair	20.0	36,035	81	Other Services (Except Public Administration)
HIPN46			6001 63 Avenue	Auto repair	2.0	11,028	81	Other Services (Except Public Administration)
HIPN47			5901 63 Avenue	Pumping and compression services	6.0	27,466	81	Other Services (Except Public Administration)
HIPN56			6202 67 Street	Animal shelter	3.7	3,546	81	Other Services (Except Public Administration)
HIPN03			6852 66 Street	I2 Medium Industrial	6.2	16,559		
HIPN04			6710 66 Street	I2 Medium Industrial	5.9	18,321		
HIPN05			6710-6804 66 Street	I2 Medium Industrial	6.1			
HIPN21			6643 63 Street Close			0		
HIPN29			#1 6673 66 Street					
HIPN29			6605 66 Street					
HIPN30			6715 66 Street		4.6	20,297		
HIPN31			6201-6417 70 Avenue	I2 Medium Industrial	16.6			
HIPN34			7115 66 Street	I2 Medium Industrial	15.2	10,820		
HIPN35			6202-6510 73 Avenue	I2 Medium Industrial	19.4			
HIPN38			7002-7212 62 Street	I2 Medium Industrial	14.4			
HIPN39			75, 6190 62 Street	I2 Medium Industrial	123.0			
HIPN40			7001-7211 62 Street	I2 Medium Industrial	14.4			
HIPN41			6001, 6191 70 Avenue	I2 Medium Industrial	15.1			
HIPN43			6301 62 Street	I2 Medium Industrial	6.7			
HIPN49			C 5702 63 Avenue					
HIPN49			D 5702 63 Avenue					
HIPN49			E 5702 63 Avenue					
HIPN49			F 5702 63 Avenue					
HIPN49			G 5702 63 Avenue					
HIPN55			6602 62 Avenue	Stormwater pond	18.6			
	TOTAL			Occupied Land	481.9	909,194		

Figure 4-12. Hill Industrial Park SOUTH Node Inventory by NAICS Industry
(Source: FBM with parcel data provided by Lloydminster)

Hill Industrial Park South
Nodal Business Inventory

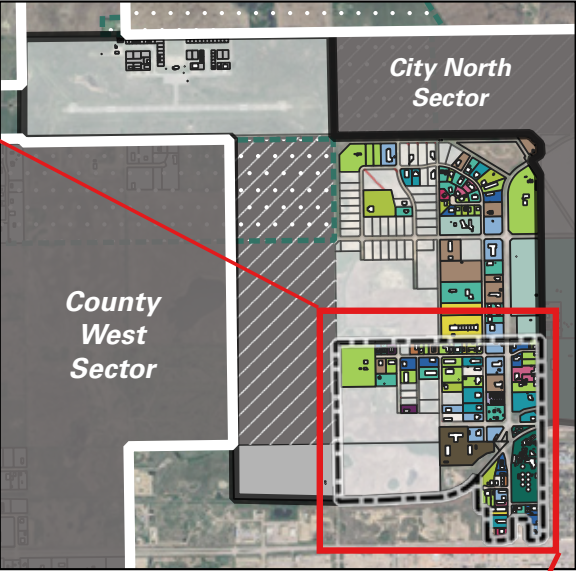
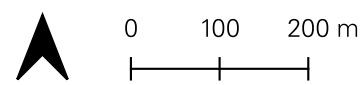


Table 4-8. Hill Industrial Park SOUTH Business Inventory
(FBM)

Parcel #	Business Name	Civic	Street Address	Land Use	Lot Area (Acres)	Total Bldg Area (inc outbldgs) - sq. ft.	NAICS Code	NAICS Category
HIPS01			7307 56 Street	Concrete contractor	22.8	15,181	31-33	Manufacturing
HIPS02			7214 56 Street		1.0	12,186	21	Mining, Quarrying, and Oil and Gas Extraction
HIPS02		1	7214 56 Street			0		
HIPS02			7214 56 Street	Services to oil and gas extraction		0	21	Mining, Quarrying, and Oil and Gas Extraction
HIPS02			7214 56 Street	Equipment supplier		0	41	Wholesale Trade
HIPS03			7156 56 Street		1.0	12,315	21	Mining, Quarrying, and Oil and Gas Extraction
HIPS03		B	7156 56 Street	Services to oil and gas extraction		0	21	Mining, Quarrying, and Oil and Gas Extraction
HIPS03		A	7156 56 Street	Construction		0	23	Construction
HIPS04			7024 56 Street		1.6	17,020	54	Professional, Scientific and Technical Services
HIPS04			7024 56 Street	Testing and inspection services		0	54	Professional, Scientific and Technical Services
HIPS04			7024 56 Street	Ice hockey team		0	71	Arts, Entertainment and Recreation
HIPS05			6918 56 Street		1.6	0		
HIPS06			6822 56 Street	Bowling alley	1.6	11,999	71	Arts, Entertainment and Recreation
HIPS07			6710 56 Street	Machinery manufacturing	1.7	8,391	31-33	Manufacturing
HIPS08			6702 56 Street		1.7	17,542	31-33	Manufacturing
HIPS08		2	6702 56 Street	Machinery manufacturing		0	31-33	Manufacturing
HIPS08			6702 56 Street	Tool services		0	81	Other Services (Except Public Administration)
HIPS09			6602 56 Street	Machinery manufacturing	1.9	15,489	31-33	Manufacturing
HIPS10			6502 56 Street	Machinery manufacturing	0.7	8,657	31-33	Manufacturing
HIPS11			6402 56 Street	Services to oil and gas extraction	1.5	14,495	21	Mining, Quarrying, and Oil and Gas Extraction
HIPS12			6308 56 Street		0.8	5,058		
HIPS13			6304 56 Street	Electrical contractor	1.8	15,471	23	Construction
HIPS14			5602 63 Avenue	Machinery manufacturing	1.0	12,146	31-33	Manufacturing
HIPS15			5601 63 Avenue	Gasoline station	3.2	4,070	44-45	Retail Trade
HIPS16			6102 56 Street	Infrastructure products and services	2.3	16,877	41	Wholesale Trade
HIPS17			5602 59 Avenue	Engineering and manufacturing	1.8	13,735	31-33	Manufacturing
HIPS18			5520 59 Avenue	Concrete contractor	4.0	9,940	31-33	Manufacturing
HIPS19			6101 56 Street	Oil field equipment supplier	2.0	16,521	41	Wholesale Trade
HIPS20			5510 59 Avenue	Waste management service	7.0	60,897	56	Administrative and Support, Waste Management and Remediation Services
HIPS21			5502 59 Avenue	Steel manufacturing	4.5	22,229	31-33	Manufacturing
HIPS22			5406 59 Avenue	Truck transportation	7.1	13,159	48-49	Transportation and Warehousing
HIPS23			5202 59 Avenue	Truck transportation	2.9	11,706	48-49	Transportation and Warehousing
HIPS24			5203 63 Avenue	Oil and gas extraction	4.4	13,115	21	Mining, Quarrying, and Oil and Gas Extraction
HIPS25			5205 63 Avenue	Self storage	3.6	54,529	53	Real Estate and Rental and Leasing
HIPS26			5503 63 Avenue	Repair shop	4.9	23,372	81	Other Services (Except Public Administration)
HIPS27			6203 56 Street	Truck dealer	5.0	30,770	44-45	Retail Trade
HIPS28			5520 63 Avenue	Truck transportation	3.0	22,590	48-49	Transportation and Warehousing
HIPS29			5518 63 Avenue		3.0	13,673		
HIPS30			5510 63 Avenue	Machinery manufacturing	3.4	27,095	31-33	Manufacturing
HIPS31			5502 63 Avenue	Truck transportation	5.0	18,989	48-49	Transportation and Warehousing
HIPS32			5204 63 Avenue	Truck transportation	3.0	12,610	48-49	Transportation and Warehousing
HIPS33			5202 63 Avenue	Truck dealer	2.6	15,057	44-45	Retail Trade
HIPS34			5201 67 Avenue		2.7	16,130		
HIPS35			5267 67 Avenue	Auto parts store	2.5	14,282	44-45	Retail Trade
HIPS36			5315 67 Avenue	I2 Medium Industrial	4.2	0		
HIPS37			5509 67 Avenue	Excavating contractor	3.0	9,898	23	Construction
HIPS38			5515 67 Avenue	Fabrication services	5.0	26,178	31-33	Manufacturing
HIPS39			5519 67 Avenue	Welding services	3.1	29,988	31-33	Manufacturing
HIPS40			5520 67 Avenue	Plumbing supply store	2.9	15,972	41	Wholesale Trade
HIPS41			5504 67 Avenue	Services to oil and gas extraction	3.7	32,346	21	Mining, Quarrying, and Oil and Gas Extraction
HIPS42			75 62 Street; 5250 67 Avenue	Urban Transition - I2 Medium Industrial	10.3	0		
HIPS43			5237 70 Avenue	Engineering	2.0	11,515	54	Professional, Scientific and Technical Services
HIPS44			5325 70 Avenue	I2 Medium Industrial	1.8	0		
HIPS45			5411 70 Avenue	I2 Medium Industrial	1.8	0		
HIPS46			5451 70 Avenue	I2 Medium Industrial	1.8	0		

Parcel #	Business Name	Civic	Street Address	Land Use	Lot Area (Acres)	Total Bldg Area (inc outbldgs) - sq. ft.	NAICS Code	NAICS Category
HIPS47			5511 70 Avenue	Steel manufacturing	3.3	29,425	31-33	Manufacturing
HIPS48			5531 70 Avenue	Safety equipment supplier	3.0	12,647	41	Wholesale Trade
HIPS49			7035 56 Street	Lifting product supplier	2.5	16,708	31-33	Manufacturing
HIPS50			7187 56 Street	Computer repair	2.5	12,561	81	Other Services (Except Public Administration)
HIPS51			5464 70 Avenue	Oilfield cementing	4.2	3,244	21	Mining, Quarrying, and Oil and Gas Extraction
HIPS52			75 62 Street; 75 50 Street	I2 Medium Industrial	162.7	0		
HIPS53			6623 52 Street	City government office	23.1	111,943	91	Public Administration
HIPS54			5110 63 Avenue	Tire shop	3.5	20,230	44-45	Retail Trade
HIPS55			5109 63 Street	Gasoline station	3.0	8,347	44-45	Retail Trade
HIPS56			52 62 Avenue		1.7	13,135		
HIPS57			4805 62 Avenue	Crop production	28.1	233,842	11	Agriculture, Forestry, Fishing and Hunting
HIPS58			4810 62 Avenue		1.8	20,264	81	Other Services (Except Public Administration)
HIPS58			4 4810 62 Avenue	Uniform store		0	31-33	Manufacturing
HIPS58			A 4810 62 Avenue	Industrial equipment supplier		0	41	Wholesale Trade
HIPS58			2 4810 62 Avenue	Geochemical fingerprinting services		0	54	Professional, Scientific and Technical Services
HIPS58			3 4810 62 Avenue	Radiator repair service		0	81	Other Services (Except Public Administration)
HIPS58			5 4810 62 Avenue	Auto detailing service		0	81	Other Services (Except Public Administration)
HIPS59			4806 62 Avenue	Building material supplier	1.0	7,522	41	Wholesale Trade
HIPS60			6202 48 Street		1.1	17,741	23	Construction
HIPS60			5 6202 48 Street	HVAC contractor		0	23	Construction
HIPS60			6202 48 Street	Construction		0	23	Construction
HIPS60			7 6202 48 Street	Gym		0	71	Arts, Entertainment and Recreation
HIPS61			6204 48 Street		1.1	8,536		
HIPS62			6208 48 Street	Construction		0	23	Construction
HIPS62			6208 48 Street		4.5	14,885	31-33	Manufacturing
HIPS62			6208 48 Street	Environmental consulting		0	54	Professional, Scientific and Technical Services
HIPS63			6207 48 Street	Engine rebuilding service	4.0	23,586	31-33	Manufacturing
HIPS64			6205 48 Street	Machinery manufacturing	1.0	4,389	31-33	Manufacturing
HIPS65			4706 62 Avenue	Fireworks supplier	2.3	24,776	44-45	Retail Trade
HIPS66			4702 62 Avenue	Business consulting	1.2	15,365	56	Administrative and Support, Waste Management and Remediation Services
HIPS67					2.8	49,477		
HIPS67			4604 62 Avenue			0		
HIPS67			4606 62 Avenue			0		
HIPS68			4602 62 Avenue	Warehousing	4.2	21,082	48-49	Transportation and Warehousing
HIPS69			6210 44 Street		1.6	6,962	81	Other Services (Except Public Administration)
HIPS69			6210 44 Street	Engine repair		0	81	Other Services (Except Public Administration)
HIPS69			6210 44 Street	Motorcycle repair		0	81	Other Services (Except Public Administration)
HIPS70			6206 44 Street	Safety training centre	2.1	14,527	61	Educational Services
HIPS71			4605 62 Avenue	Clothing store	0.3	4,038	44-45	Retail Trade
HIPS72			4603 62 Avenue	Auto repair	0.3	5,716	81	Other Services (Except Public Administration)
HIPS73			4601 62 Avenue	Cabinet manufacturing	0.3	6,042	31-33	Manufacturing
HIPS74			5905 47 Street	Oil and gas extraction	1.9	11,007	21	Mining, Quarrying, and Oil and Gas Extraction
HIPS75			5903 47 Street		0.8	9,873	41	Wholesale Trade
HIPS75			B 5903 47 Street	Hose supplier		0	41	Wholesale Trade
HIPS75			A 5903 47 Street	Testing services		0	54	Professional, Scientific and Technical Services
HIPS76			5901 47 Street		1.5	23,012	41	Wholesale Trade
HIPS76			A 5901 47 Street	Electrical supply store		0	41	Wholesale Trade
HIPS76			B 5901 47 Street	Plumbing supply store		0	41	Wholesale Trade
HIPS77			4502 59 Avenue	Auto electrical services	2.3	5,656	41	Wholesale Trade
HIPS78			5904 44 Street	Gasoline station	3.3	5,691	44-45	Retail Trade
		TOTAL			Occupied Land	249.3	1,485,423	

Figure 4-13. Airport Node Inventory by NAICS Industry
(Source: FBM with parcel data provided by Lloydminster)

Airport Nodal Business Inventory

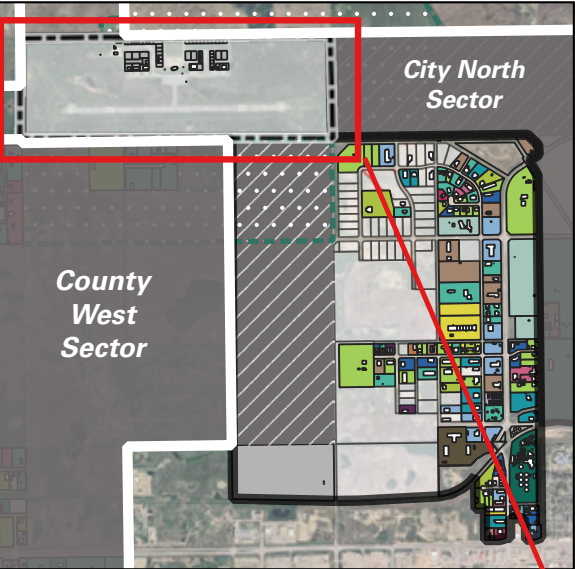
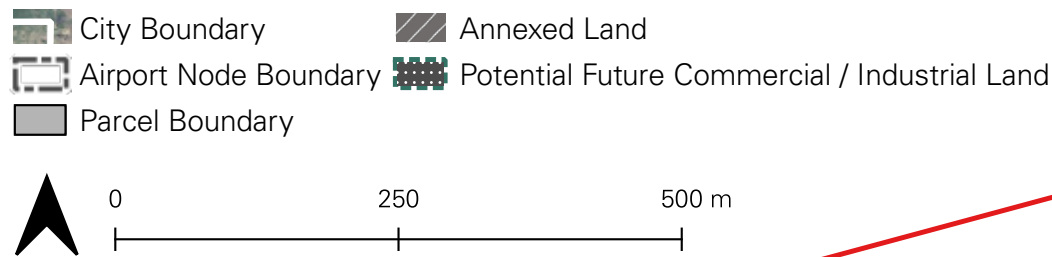


Table 4-9. Airport Business Inventory
(FBM)

Parcel #	Business Name	Civic	Street Address	Land Use	Lot Area (Acres)	Total Bldg Area (inc outbldgs) - sf	NAICS Code	NAICS Category
			7027 81 Avenue	Airport Hangar	0.37		48-49	Transportation and Warehousing
			8041 70 Street	Airport Hangar	0.37		48-49	Transportation and Warehousing
			7084 83 Avenue	Airport Hangar	0.37		48-49	Transportation and Warehousing
			7054 83 Avenue	Airport Hangar	0.37		48-49	Transportation and Warehousing
			7022 83 Avenue	Airport Hangar	0.37		48-49	Transportation and Warehousing
			6952 80A Avenue	Airport Hangar	0.19		48-49	Transportation and Warehousing
			7095 81 Avenue	Airport Hangar	0.37		48-49	Transportation and Warehousing
			8449 72 Street	Airport Hangar	0.22		48-49	Transportation and Warehousing
			8357 72 Street	Airport Hangar	0.22		48-49	Transportation and Warehousing
			8439 70 Street	Airport Hangar	0.89		48-49	Transportation and Warehousing
			8009, 8025 70 Street	Airport Hangar	0.89		48-49	Transportation and Warehousing
			7025 84 Avenue	Airport Hangar	0.62		48-49	Transportation and Warehousing
			8143 70 Street	Airport Hangar	1.30		48-49	Transportation and Warehousing
			6955 84 Avenue	Airport Hangar	0.86		48-49	Transportation and Warehousing
			8419 72 Street	Airport Hangar	0.22		48-49	Transportation and Warehousing
			8485 70 Street	Airport Hangar	0.86		48-49	Transportation and Warehousing
	TOTAL			Occupied Land	8.50	0		

4.8 City East Sector

The map shown in **Figure 4-16** provides a visual overview of Lloydminster's East Sector's inventory.

Nodes in the City East Sector are:

- East
- (North Industrial) - future industrial

Table 4-10 summarizes the North Sector while **Table 4-11** details the inventory of the East node, including vacancy, business count, percentage share of primary business uses, and NAICS categories. Visually, **Figures 4-15 to 4-16** illustrate the composition and mix of each of the respective nodes within the City East Sector.

Top Industries (by NAICS Code)

1. Transportation & Warehousing - 13 business & 96 employees
2. Other Services (excl public admin) - 9 business & 292 employees
3. Mining Quarrying and Oil & Gas - 7 businesses & 79 employees

Miscellaneous observations:

- Most (or all) buildings in the East node are single-tenant.
- Some businesses appeared to own more than one parcel for storage and other operational uses.
- Parcel E02 is an undeveloped train yard, although further investigation may be required.
- The East node has a large parcel E26 which could be an attractive parcel for larger users or equally could have a concept plan prepared for another specialized business park concept.
- Future Industrial lands represent a large, as yet unserved potential for expansion.

Table 4-10. City East Sector Industrial Inventory Summary by Node

(Source: FBM and City of Lloydminster)

	East	North Industrial (Future)
Total Gross Land Area (ac)	389	
Estimated Total Building Space (sq. ft.)	781,962	n/a
Estimated Occupied Industrial Site Coverage Ratio	10.5%	n/a
Total existing vacant land without buildings (acres)	218	n/a
Total existing vacant building space (sq. ft.)	33,583	n/a
Number of Businesses	51	n/a
Number of Industrial Employees (est)	856	n/a
Employees per Developed Acre (Est)	5.0	n/a



G.Force DIESEL SERVICE



Figure 4-14. East Sector and Node Inventory by NAICS Industry
(Source: FBM with parcel data provided by Lloydminster)

City East Sector Business Inventory



Table 4-11.East Business Inventory
(FBM)

Parcel #	Business Name	Civic	Street Address	Land Use	Lot Area (Acres)	Total Bldg Area (inc outbldgs) - sf	NAICS Code	NAICS Category
E01			0 40 Avenue		9.7			
E02				Train yard	55.9			
E03			5125 49 Avenue	I1 Light Industrial	0.4			
E04			4819 52 Street	Equipment rental	1.0	3,996	53	Real Estate and Rental and Leasing
E05			4801 52 Street	I1 Light Industrial	0.7	0		
E06			5104 48 Avenue	I1 Light Industrial	0.2	0		
E07			4729 52 Street	I1 Light Industrial	0.7	4,616		
E08					1.7	4,956		
E09			4701 52 Street	I1 Light Industrial	0.7	0	48-49	Transportation and Warehousing
E10			4609 52 Street	Truck transportation	3.7	19,962	48-49	Transportation and Warehousing
E11			4515 52 Street	Agricultural service	7.7	27,134	11	Agriculture, Forestry, Fishing and Hunting
E12			4409 52 Street	Door supplier	1.2	6,568	31-33	Manufacturing
E13			4407 52 Street	Auto repair and services	2.6	18,202	81	Other Services (Except Public Administration)
E14			4401 52 Street	Mailing service	5.7	19,097	48-49	Transportation and Warehousing
E15			4303 52 Street	Storage	2.0	5,159	53	Real Estate and Rental and Leasing
E16			4301 52 Street	Equipment repair	4.2	26,759	81	Other Services (Except Public Administration)
E17			4205 52 Street	Oil and gas extraction	2.2	10,895	21	Mining, Quarrying, and Oil and Gas Extraction
E18			4201 52 Street		1.1	10,641		
E19			5104 42 Avenue	Waste management	1.5	15,626	56	Administrative and Support, Waste Management and Remediation Services
E20			5102 42 Avenue	Services to oil and gas extraction	2.4	1,946	21	Mining, Quarrying, and Oil and Gas Extraction
E21			4007 52 Street	Truck transportation	1.1	6,210	48-49	Transportation and Warehousing
E22			4005 52 Street	Gun shop	0.9	4,823	44-45	Retail Trade
E23			4003 52 Street	Drilling contractor	1.4	12,288	23	Construction
E24			4001 52 Street	Paving contractor	9.6	10,721	23	Construction
E25			5002 40 Avenue	Storage	1.3	5,164	48-49	Transportation and Warehousing
E26					133.7	0		
E27			5201 40 Avenue	Truck dealer	3.1	30,220	44-45	Retail Trade
E28			3916 52 Street Close	Mechanical repair	2.4	13,620	81	Other Services (Except Public Administration)
E29			3908 52 Street Close	School bus transportation	2.0	5,689	48-49	Transportation and Warehousing
E30			3902 52 Street	Oil field equipment supplier	2.0	15,319	41	Wholesale Trade
E31			3710 52 Street	HVAC contractor	5.7	2,612	23	Construction
E32			3702 52 Street Close	I1 Light Industrial	13.5	0		

Parcel #	Business Name	Civic	Street Address	Land Use	Lot Area (Acres)	Total Bldg Area (inc outbldgs) - sf	NAICS Code	NAICS Category
E33			3701 52 Street Close	Services to oil and gas extraction	3.1	7,425	21	Mining, Quarrying, and Oil and Gas Extraction
E34			3705 52 Street Close	Oil and gas extraction	3.6	23,430	21	Mining, Quarrying, and Oil and Gas Extraction
E35			3711 52 Street Close	Utilities	3.3	10,846	22	Utilities
E36			3915 52 Street Close	Services to oil and gas extraction	8.5	48,601	21	Mining, Quarrying, and Oil and Gas Extraction
E37			5003 40 Avenue	Auto repair and maintenance	5.3	16,479	81	Other Services (Except Public Administration)
E38			4802 40 Avenue	Auto repair and maintenance	1.0	7,202	81	Other Services (Except Public Administration)
E39			4704 40 Avenue	Towing service	1.2	5,941	48-49	Transportation and Warehousing
E40			4702 40 Avenue	Services to oil and gas extraction	1.8	15,507	21	Mining, Quarrying, and Oil and Gas Extraction
E41			4807 40 Avenue	Truck wash	2.4	16,008	81	Other Services (Except Public Administration)
E42			4801 40 Avenue	Truck dealer	1.9	13,058	44-45	Retail Trade
E43			4701 40 Avenue	Diesel engine dealer	1.9	13,277	44-45	Retail Trade
E44			3860 47 Street	Storage	6.8	0	48-49	Transportation and Warehousing
E45			3752 47 Street	Institutional	5.1	16,432	91	Public Administration
E46			3714 47 Street	I1 Light Industrial	2.2	0		
E47			4405 37 Avenue	Truck repair	3.9	26,985	81	Other Services (Except Public Administration)
E48			4401 37 Avenue	Equipment rental	2.6	7,071	53	Real Estate and Rental and Leasing
E49			4404 37 Avenue	Farm equipment supplier	13.7	59,221	41	Wholesale Trade
E50			3835 47 Street	Construction	3.1	16,079	23	Construction
E51			3915 47 Street		1.3	0		
E52			4615 40 Avenue	Distribution and logistics facility	2.0	27,020	48-49	Transportation and Warehousing
E53					2.2	140		
E54			3912 44 Street	Towing service	1.9	9,961	48-49	Transportation and Warehousing
E55			3711 44 Street	I1 Light Industrial	2.4	13,370		
E56			3804 41 Street	Self-storage facility	2.2	32,463	48-49	Transportation and Warehousing
E57			3709 44 Street	Diesel engine dealer	3.1	8,230	44-45	Retail Trade
E58			3701 44 Street	Sign manufacturing	3.4	18,625	31-33	Manufacturing
E59			4202 37 Avenue	Utility	1.7	3,906	51	Information and Cultural Industries
E60			3702 41 Street	Truck transportation	2.4	18,004	48-49	Transportation and Warehousing
E61			3607 44 Street	Boat repair	1.9	9,059	81	Other Services (Except Public Administration)
E62			3603 44 Street	Institutional	3.4	20,423	91	Public Administration
E63			4203 37 Avenue	Truck transportation	2.0	9,885	48-49	Transportation and Warehousing
E64			4201 37 Avenue	Oil and gas extraction	2.4	13,535	21	Mining, Quarrying, and Oil and Gas Extraction
E65			4103 37 Avenue	Maintenance shop	3.0	11,556	81	Other Services (Except Public Administration)
	TOTAL			Occupied Land	171.41	781,962		

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4.9 County West Sector

The map shown in **Figure 4-18** provides a visual overview of the County West Sector's inventory. Lands herein fall within the County of Vermilion River on the periphery of Lloydminster.

Nodes in the County West Sector are:

- West Peripheral
- Reinhart Industrial Park
- Reinhart Business Park
- County Energy Park
- Corridor Business Park
- Devonia Business Park
- Kam's Industrial Park

Table 4-12 summarizes the County Sector while **Tables 4-13 through 4-18** details the inventory of all the individual nodes in the County West Sector, including vacancy, business count, percentage share of primary business uses, and NAICS categories.

Table 4-12. County West Sector Industrial Inventory Summary by node

(Source: FBM and City of Lloydminster)

	West Peripheral	Reinhart Industrial Park	Reinhart Business Park	County Energy Park	Corridor Business Park	Devonia Business Park	Kam's Industrial Park
Total Gross Land Area (ac)	33.84	140.49	135.86	127.14	104.73	125.11	127.08
Estimated Total Building Space (sq. ft.)	73,343.25	231,171.56	152,845.76	372,954.89	267,716.98	285,282.27	260,312.53
Estimated Building Site Coverage Ratio (FAR)	2.8%	3.8%	6.8%	7.5%	5.9%	5.5%	6.5%
Number of vacant land without buildings (acres)	0	0	84	11	0	6	35
Estimated Total building space vacancy (sq. ft.)	73,343	11,048	70,996	13,766	0	35,183	15,386
Number of Businesses	6	18	5	20	7	21	8
Number of Industrial Employees (est)	54	232	79	278	186	215	158
Employees per Developed Acre (Est)	0.9	1.7	1.5	2.4	1.8	1.8	1.7

Visually, **Figures 4-17 to 4-21** illustrate the composition and mix of each of the respective nodes within the County West Sector

Top Industries (by employment and NAICS Code) for the overall West Sector are visually shown in **Figure 4-22** and reveal a wide cross-section of industries and business type. Overall however the Mining, Quarrying and Oil & Gas Extraction business type (by NAICS) is the most prominent in terms of business:

Miscellaneous observations:

- Kam's Industrial Park and Reinhart Business Park has have the largest available acreage as vacant or undeveloped.
- Corridor Business Park and Reinhart Industrial Park have strong occupancy of existing businesses.
- Both the Reinhart Industrial Park and West Peripheral fall within recommended 'commercial/industrial' area of the airport (2020 study)

LAKELAND COLLEGE



Figure 4-15. County West Sector Map
(Source: FBM with parcel data provided by Lloydminster)

County West Sector
Business Inventory

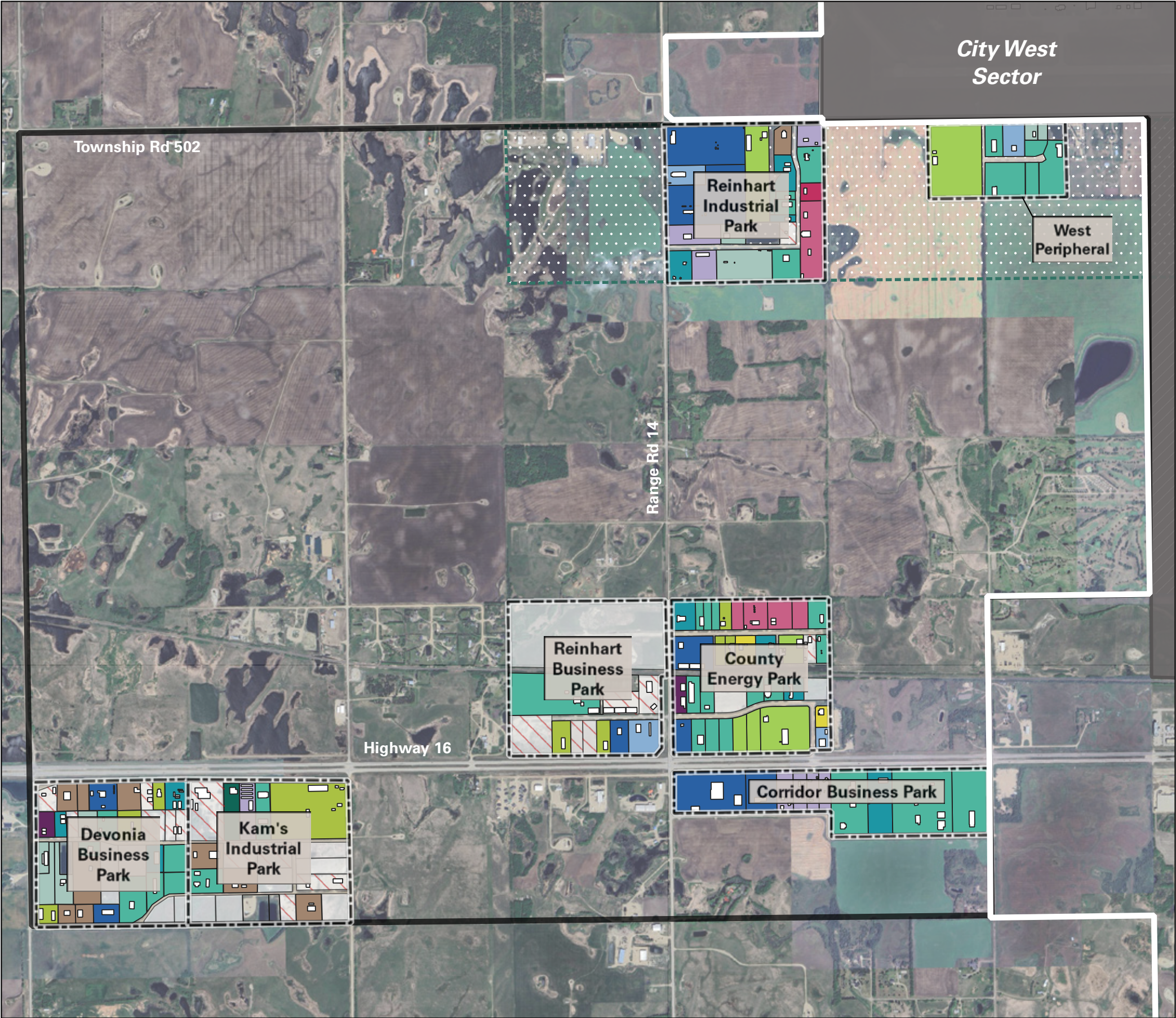


Figure 4-16. Reinhart Industrial Park and West Peripheral Node Inventories by NAICS Industry
(Source: FBM with parcel data provided by Lloydminster)

Reinhart Industrial Park & West Peripheral Nodal Business Inventory

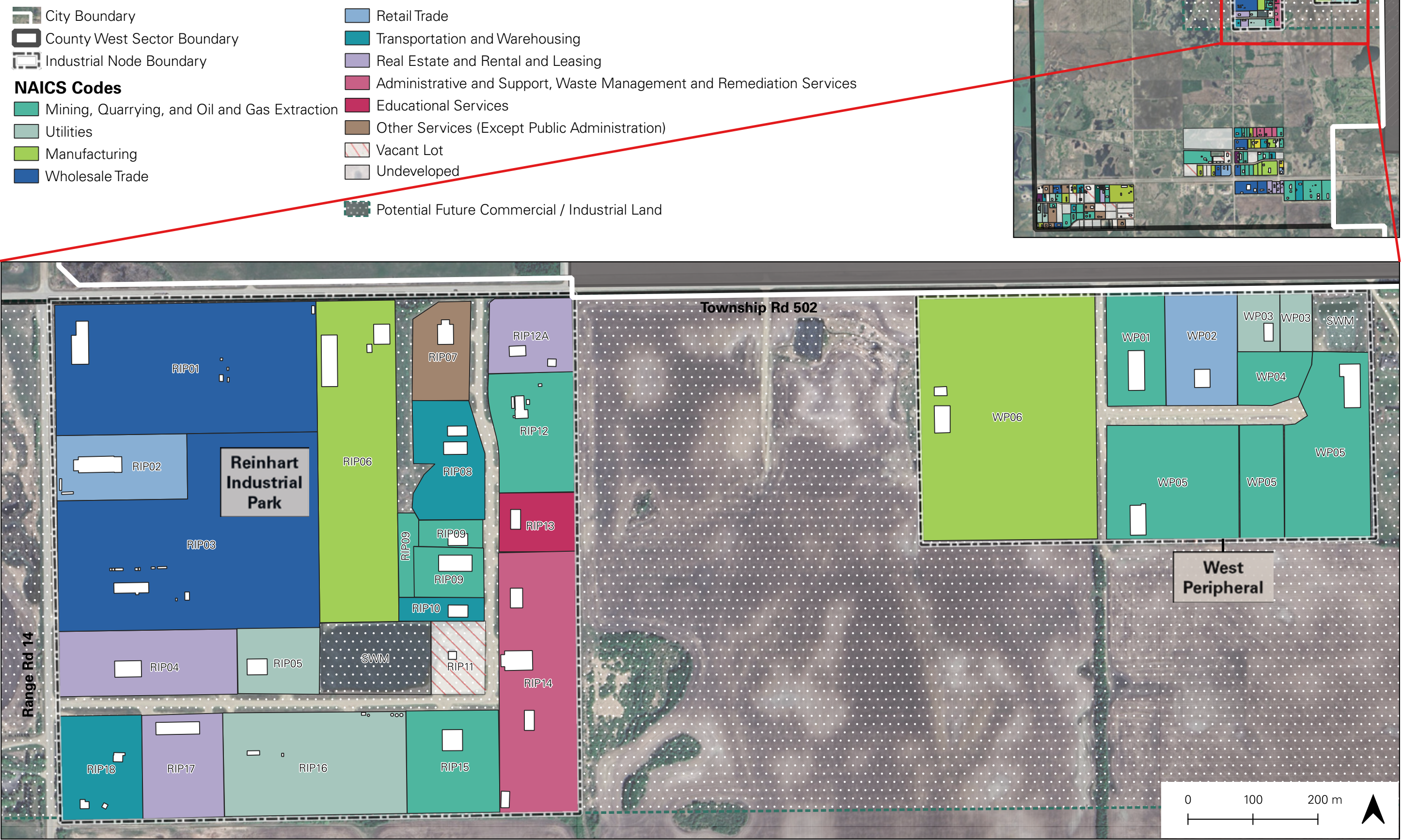


Table 4-13.Reinhart Industrial Park Business Inventory
(FBM)

Parcel #	Business Name	Civic	Street Address	Land Use	Lot Area (Acres)	Total Bldg Area (inc outbldgs) - sf	NAICS Code	NAICS Category
RIP01			501075 Range Road 14	Oil field equipment supplier	20.0	18,986	41	Wholesale Trade
RIP02			501069 Range Road 14	Auto parts dealer	5.0	20,441	44-45	Retail Trade
RIP03			501057 Range Road 14	Industrial equipment supplier	25.0	12,335	41	Wholesale Trade
RIP04			Lot 5 Reinhart Industrial Park	Property management	6.8	11,048	53	Real Estate and Rental and Leasing
RIP05			Lot 8B Reinhart Industrial Park	Utilities	3.2	8,173	22	Utilities
RIP06			13061 Township Road 502	Pipe supplier	14.9	30,397	31-33	Manufacturing
RIP07			Site 10A Reinhart Industrial Park	Truck repair	3.2	9,072	81	Other Services (Except Public Administration)
RIP08				Transportation warehousing	4.6	12,570	48-49	Transportation and Warehousing
RIP09			12 Reinhart Industrial Park	Oil and gas extraction	3.9	19,836	21	Mining, Quarrying, and Oil and Gas Extraction
RIP10				Transportation services	1.2	6,144	48-49	Transportation and Warehousing
RIP11					2.3	1,632		
RIP12				Service to oil and gas extraction	5.6	7,617	21	Mining, Quarrying, and Oil and Gas Extraction
RIP12A			13045 Township 502	Property management	3.7	5,940	53	Real Estate and Rental and Leasing
RIP13				Driver training school	2.6	5,027	61	Educational Services
RIP14				Waste management service	12.0	29,892	56	Administrative and Support, Waste Management and Remediation Services
RIP15			Site 15 Reinhart Industrial Park	Oil and gas extraction	5.6	10,881	21	Mining, Quarrying, and Oil and Gas Extraction
RIP16			Site 6 Reinhart Industrial Park	Utilities	11.0	2,552	22	Utilities
RIP17			Site 7 Reinhart Industrial Park	Trailer rental	4.9	13,799	53	Real Estate and Rental and Leasing
RIP18			501043A Range Road 14 - 6 Reinhart I	Outdoor storage	5.0	4,832	48-49	Transportation and Warehousing
	TOTAL			Occupied Land	140.49	231,172		

Table 4-14.West Peripheral Business Inventory
(FBM)

Parcel #	Business Name	Civic	Street Address	Land Use	Lot Area (Acres)	Total Bldg Area (inc outbldgs) - sf	NAICS Code	NAICS Category
WP01			Range Road 13 Township Road 502	Service to oil and gas extraction	4.0	16,569	21	Mining, Quarrying, and Oil and Gas Extraction
WP02			NW 10-50-1-W4 Airport Road	Propane supplier	4.9	7,221	44-45	Retail Trade
WP03				Utilities	2.7	4,213	22	Utilities
WP04				Service to oil and gas extraction	2.1		21	Mining, Quarrying, and Oil and Gas Extraction
WP05			501077 Range Road 13	Oil and gas extraction	20.2	31,592	21	Mining, Quarrying, and Oil and Gas Extraction
WP06				Blasting and coating services	25.6	13,748	31-33	Manufacturing
	TOTAL			Occupied Land	59.40	73,343		

Figure 4-17. Reinhart Business Park, County Energy Park and Corridor Business Park Node Inventories by NAICS Industry
(Source: FBM with parcel data provided by Lloydminster)

Reinhart Business Park, County Energy Park, and Corridor Business Park
Nodal Business Inventory

- City Boundary

County West Sector Boundary

Industrial Node Boundary
- NAICS Codes**

Mining, Quarrying, and Oil and Gas Extraction

Utilities

Construction

Manufacturing

Wholesale Trade

Retail Trade

Transportation and Warehousing

Real Estate and Rental and Leasing

Professional, Scientific and Technical Services

Administrative and Support, Waste Management and Remediation Services

Vacant Lot

Undeveloped

User Unknown

Potential Future Commercial / Industrial Land

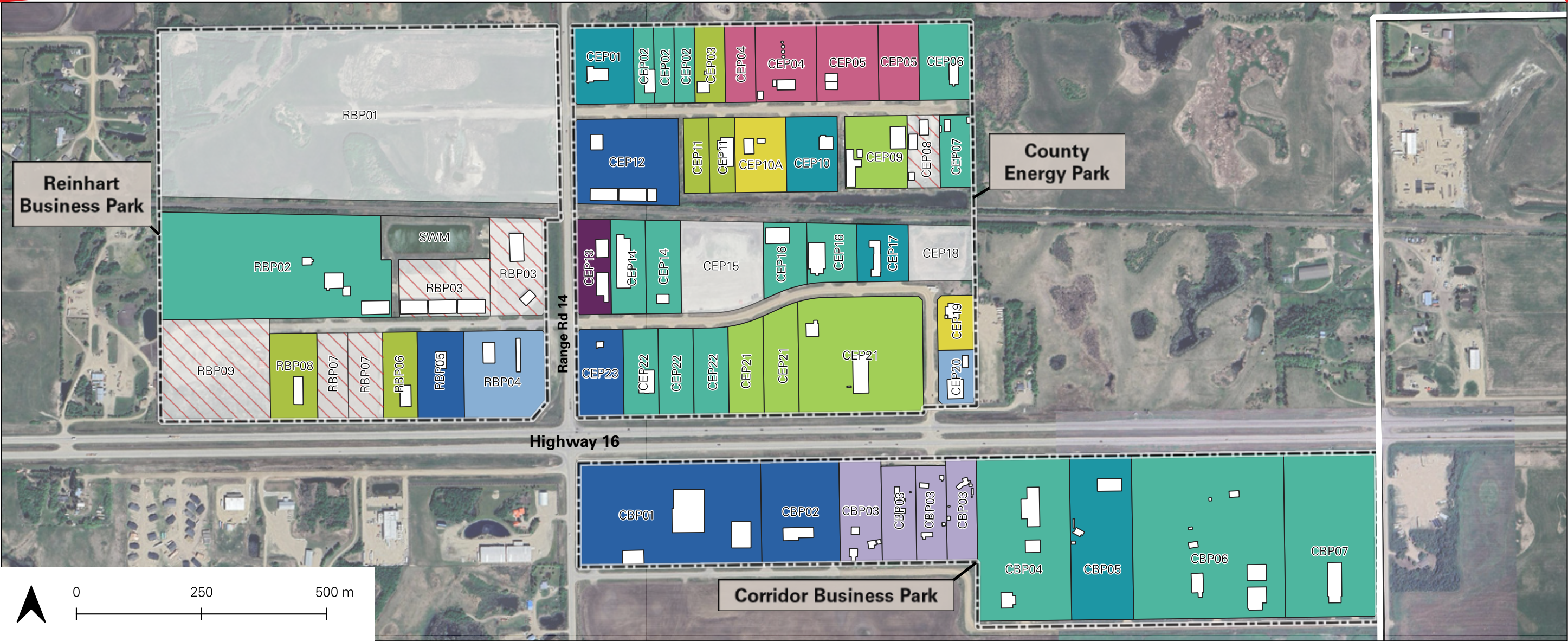
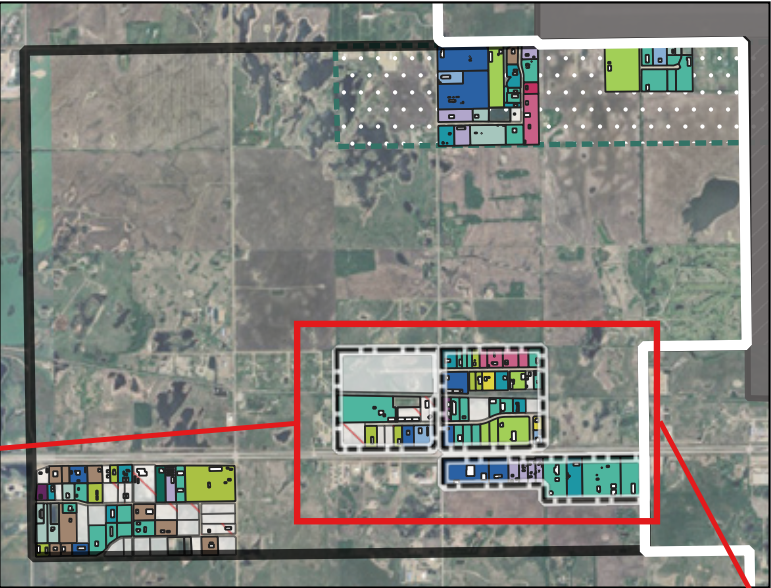


Table 4-15.Reinhart Business Park Business Inventory
(FBM)

Parcel #	Business Name	Civic	Street Address	Land Use	Lot Area (Acres)	Total Bldg Area (inc outbldgs) - sf	NAICS Code	NAICS Category	NAICS Sub-Code
CBP01			13086 Spruce Hill Road	Agricultural equipment supplier	18.6	93,365	41	Wholesale Trade	417
CBP02			13064 Spruce Hill Road	Agricultural equipment supplier	8.0	15,256	41	Wholesale Trade	417
CBP03			13051 Spruce Hill Road	Tent rental service	13.5	27,778	53	Real Estate and Rental and Leasing	532
CBP04			13036 Spruce Hill Road	Service to oil and gas extraction	15.0	43,402	21	Mining, Quarrying, and Oil and Gas Extraction	213
CBP05			13026 Spruce Hill Road	Truck transportation	10.0	16,854	48-49	Transportation and Warehousing	484
CBP06			13020 Spruce Hill Road	Service to oil and gas extraction	24.5	47,142	21	Mining, Quarrying, and Oil and Gas Extraction	213
CBP07			13004 Spruce Hill Road	Service to oil and gas extraction	15.0	23,921	21	Mining, Quarrying, and Oil and Gas Extraction	213
	TOTAL			Occupied Land	104.73	267,717			

Table 4-16. County Energy Park Business Inventory
(FBM)

Parcel #	Business Name	Civic	Street Address	Land Use	Lot Area (Acres)	Total Bldg Area (inc outbldgs) - sf	NAICS Code	NAICS Category
CEP01			4 Production Avenue	Truck transportation	4.6	12,369	48-49	Transportation and Warehousing
CEP02			8 Production Avenue	Service to oil and gas extraction	4.7	10,939	21	Mining, Quarrying, and Oil and Gas Extraction
CEP03			20 Production Avenue	Sandblasting service	2.3	6,487	23	Construction
CEP04			28 Production Avenue	Waste management	7.0	12,338	56	Administrative and Support, Waste Management and Remediation Services
CEP05			32 Production Avenue		7.8	8,480		
CEP05			32 Production Avenue	Equipment supplier			41	Wholesale Trade
CEP05			32 Production Avenue	Property management			56	Administrative and Support, Waste Management and Remediation Services
CEP06			40 Production Avenue	Service to oil and gas extraction	4.0	8,259	21	Mining, Quarrying, and Oil and Gas Extraction
CEP07			43 Production Avenue	Service to oil and gas extraction	2.3	5,062	21	Mining, Quarrying, and Oil and Gas Extraction
CEP08			39 Production Avenue		2.3	13,766		
CEP09			35 Production Avenue	Welder	4.5	33,003	31-33	Manufacturing
CEP10			27, 31 Production Avenue	Truck transportation	3.8	16,104	48-49	Transportation and Warehousing
CEP10A					3.8			
CEP11			23 Production Avenue	Sandblasting service	3.8	17,188	23	Construction
CEP12			5 Production Avenue	Safety equipment supplier	8.8	42,301	41	Wholesale Trade
CEP13			84 Auto Road	College laboratory	3.3	23,247	54	Professional, Scientific and Technical Services
CEP14			80 Auto Road	Service to oil and gas extraction	6.5	35,711	21	Mining, Quarrying, and Oil and Gas Extraction
CEP15			72 Auto Road		7.2	0		
CEP16			58 Auto Road	Service to oil and gas extraction	5.8	38,170	21	Mining, Quarrying, and Oil and Gas Extraction
CEP17			54 Auto Road	Truck transportation	2.9	12,888	48-49	Transportation and Warehousing
CEP18			9PUL County Energy Park		3.6	0		
CEP19			51 King Street	Business type to be confirmed	2.0	8,596		
CEP20			47 King Street	Motorsports dealer	2.0	16,648	44-45	Retail Trade
CEP21			44 King Street	Machinery manufacturing	21.1	33,995	31-33	Manufacturing
CEP22			79 Auto Road	Service to oil and gas extraction	9.0	15,446	21	Mining, Quarrying, and Oil and Gas Extraction
CEP23			83 Auto Road	Farm equipment supplier	4.0	1,959	41	Wholesale Trade
	TOTAL			Occupied Land	116.36	372,955		

Table 4-17.Corridor Business Park Business Inventory
(FBM)

Parcel #	Business Name	Civic	Street Address	Land Use	Lot Area (Acres)	Total Bldg Area (inc outbldgs) - sf	NAICS Code	NAICS Category	NAICS Sub-Code
RBP01					67.2				
RBP02			98 Auto Road	Service to oil and gas extraction	23.4	35,360	21	Mining, Quarrying, and Oil and Gas Extraction	213
RBP03			88 Auto Road		10.5	70,996			
RBP04			87 Auto Road	Gas station	7.0	17,037	44-45	Retail Trade	457
RBP05			91 Auto Road	Construction equipment supplier	4.0	7,887	41	Wholesale Trade	417
RBP06			95 Auto Road	Electrician	3.0	10,178	23	Construction	238
RBP07			97, 101 Auto Road		5.7	0			
RBP08			105 Auto Road	Electrician	4.1	11,388	23	Construction	238
RBP09					11.0	0			
	TOTAL			Occupied Land	51.97	152,846			

Figure 4-18. Devonia Business Park and Kam's Industrial Park Node Inventories by NAICS Industry
(Source: FBM with parcel data provided by Lloydminster)

Devonia Business Park & Kam's Industrial Park
Nodal Business Inventory

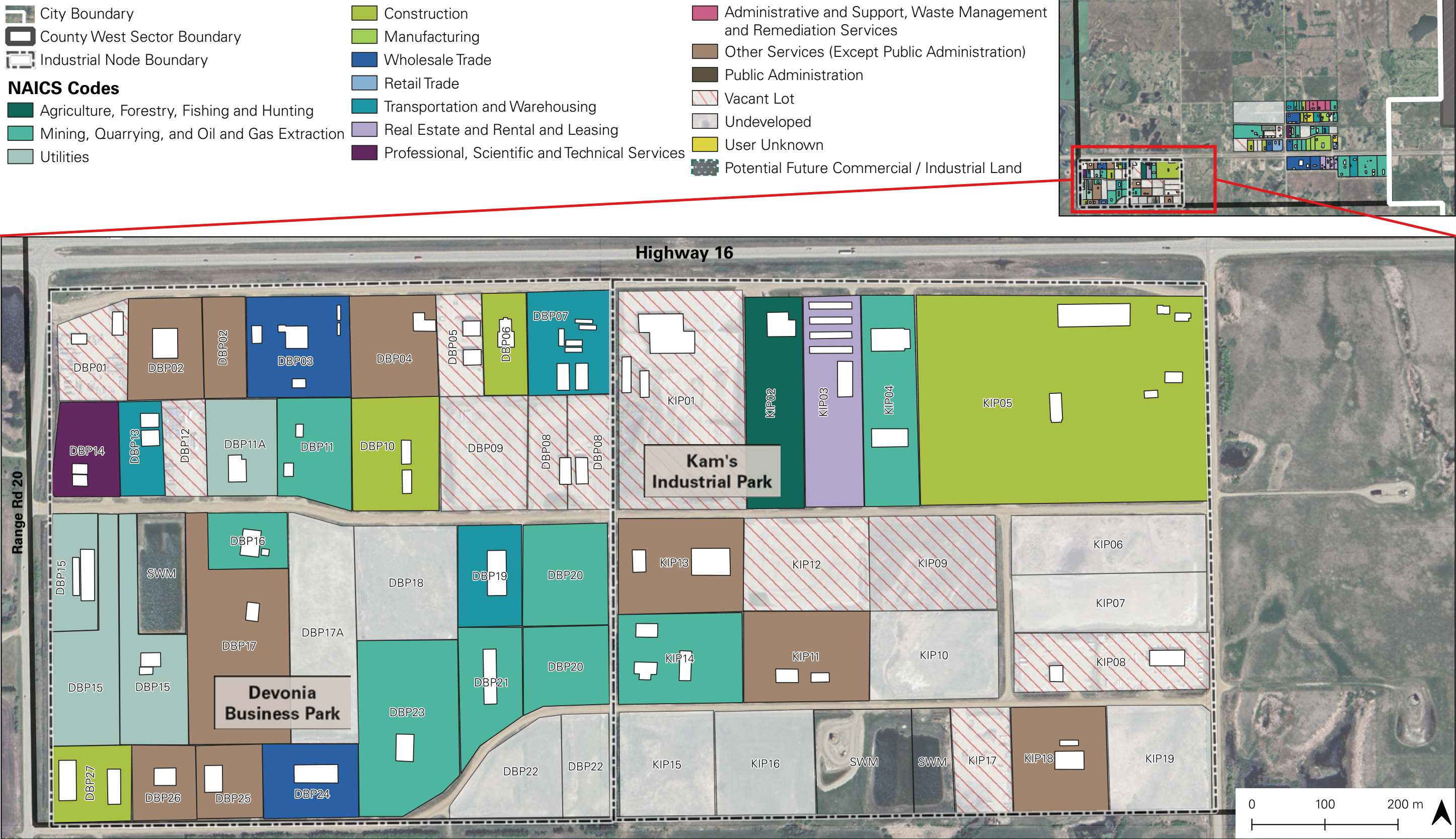


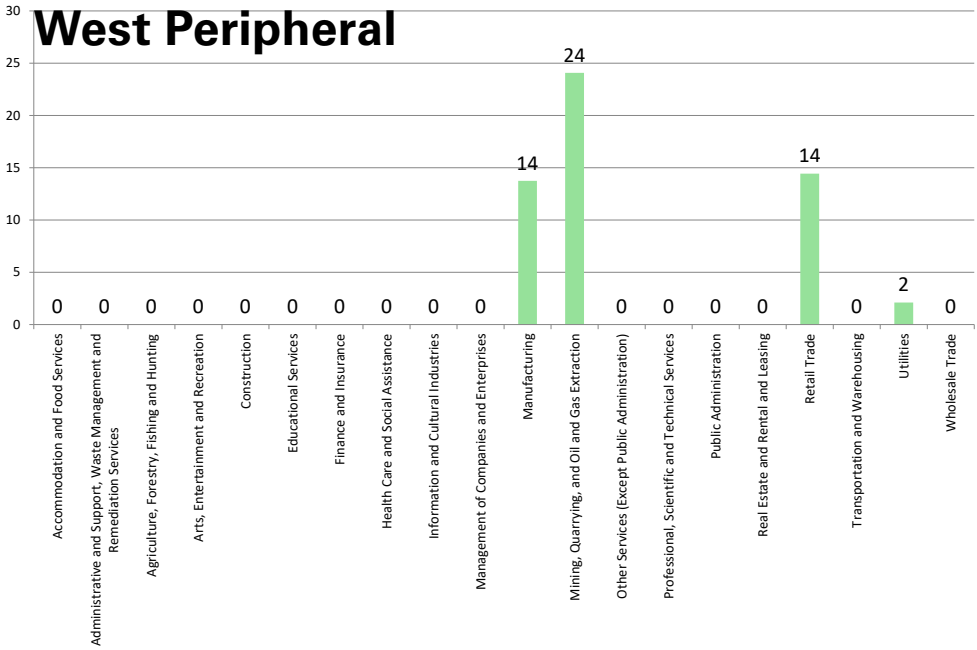
Table 4-18.Kam’s Industrial Park Business Inventory
(FBM)

Parcel #	Business Name	Civic	Street Address	Land Use	Lot Area (Acres)	Total Bldg Area (inc outbldgs) - sf	NAICS Code	NAICS Category
KIP01			15037 Highway 16		12.7	47,352		
KIP02			15031 Highway 16	Agrochemicals supplier	5.6	12,951	11	Agriculture, Forestry, Fishing and Hunting
KIP03			15025 Highway 16	Self-storage facility	5.7	34,358	48-49	Transportation and Warehousing
KIP04			15021 Highway 16	Service to oil and gas extraction	5.3	30,842	21	Mining, Quarrying, and Oil and Gas Extraction
KIP05			Lot 1 Kam's Industrial Park	Modular home construction	27.7	50,124	23	Construction
KIP06			Lot 2 Kam's Industrial Park		5.3	0		
KIP07			Lot 3 Kam's Industrial Park		5.3	0		
KIP08			120 Miller Street		5.2	15,386		
KIP09			105 Willoughby Street		5.5	0		
KIP10			136 Miller Street		5.3	0		
KIP11			140 Miller Street	Machine repair	5.3	9,621	81	Other Services (Except Public Administration)
KIP12			95 Willoughby Street		5.4	0		
KIP13			91 Willoughby Street	Trailer repair	5.5	26,978	81	Other Services (Except Public Administration)
KIP14			146 Miller Street	Oil and gas extraction	5.2	19,846	21	Mining, Quarrying, and Oil and Gas Extraction
KIP15			149 Miller Street		4.6	0		
KIP16			143 Miller Street		4.8	0		
KIP17			131 Miller Street		2.8	0		
KIP18			127 Miller Street	Auto service	4.7	12,854	81	Other Services (Except Public Administration)
KIP19			123 Miller Street		5.1	0		
	TOTAL			Occupied Land	92.19	260,313		

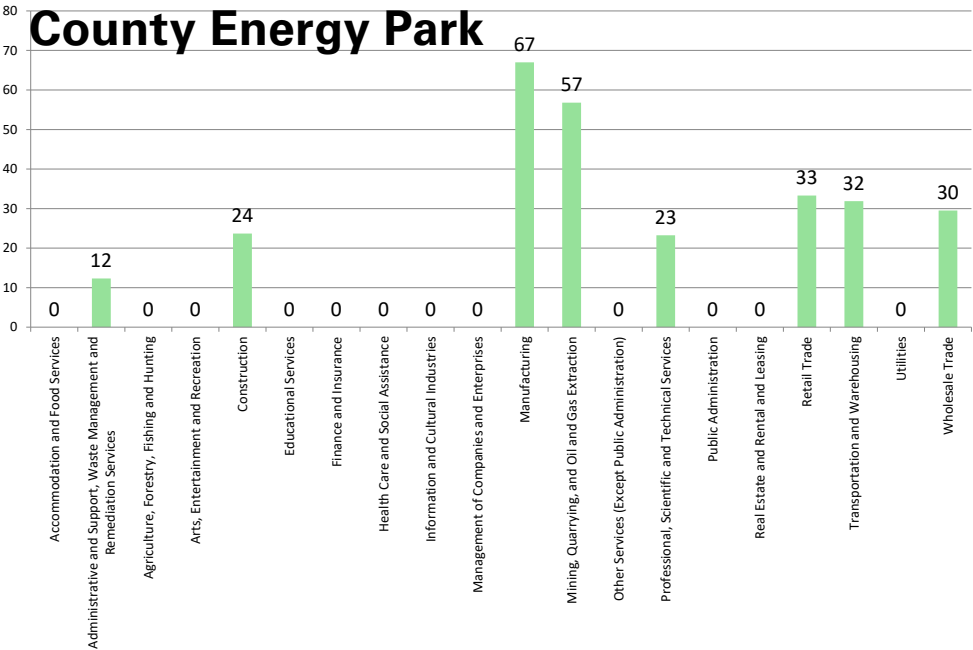
Table 4-19.Devonia Business Park Business Inventory
(FBM)

Parcel #	Business Name	Civic	Street Address	Land Use	Lot Area (Acres)	Total Bldg Area (inc outbldgs) - sf	NAICS Code	NAICS Category
DBP01			15077 Highway 16		2.9	8,350		
DBP02			15071 Highway 16 Lot 2 Devonia Busin	Pump repair	5.5	15,160	81	Other Services (Except Public Administration)
DBP03			15067 Highway 16	Construction equipment supplier	4.8	19,127	41	Wholesale Trade
DBP04			15059 Highway 16	Church	4.1	6,821	81	Other Services (Except Public Administration)
DBP05			15053 Highway 16		2.1	10,903		
DBP06			15049 Highway 16	Industrial insulation and scaffolding	2.1	8,343	23	Construction
DBP07			15047 Highway 16	RV Storage	4.0	22,125	48-49	Transportation and Warehousing
DBP08			90 Willoughby Street		4.3	12,674		
DBP09			78 Willoughby Street		4.6	0		
DBP10			78 Willoughby Street	Pile driving service	4.6	9,055	23	Construction
DBP11			70 Willoughby Street	Oil and gas storage	3.6	13,875	21	Mining, Quarrying, and Oil and Gas Extraction
DBP11A			66 Willoughby Street	Service to oil and gas extraction	3.2		22	Utilities
DBP12			62 Willoughby Street		1.9	0		
DBP13			58 Willoughby Street	Outdoor storage	1.9	11,006	48-49	Transportation and Warehousing
DBP14		#103	52 Willoughby Street	Laboratory		3,478	54	Professional, Scientific and Technical Services
DBP14			52 Willoughby Street		2.8			
DBP14		#101	52 Willoughby Street			3,256		
DBP15			49 Willoughby Street	Utilities	11.7	27,227	22	Utilities
DBP16			69 Willoughby Street	Service to oil and gas extraction	2.1	10,867	21	Mining, Quarrying, and Oil and Gas Extraction
DBP17			65 Willoughby Street	Massage therapist	8.9	4,610	81	Other Services (Except Public Administration)
DBP17A			65 Willoughby Street		6.9			
DBP18			77 Willoughby Street		5.4	0		
DBP19			81 Willoughby Street	Warehousing	3.0	17,358	48-49	Transportation and Warehousing
DBP20			87 Willoughby Street; 150 Miller Street	Oil tanks	7.2	0	21	Mining, Quarrying, and Oil and Gas Extraction
DBP21			154 Miller Street	Service to oil and gas extraction	3.3	14,388	21	Mining, Quarrying, and Oil and Gas Extraction
DBP22			151, 161 Miller Street		6.1	0		
DBP23			158 Miller Street	Oil and gas shop and repair	7.8	9,652	21	Mining, Quarrying, and Oil and Gas Extraction
DBP24			164 Miller Street	Tire wholesaler	3.3	16,160	41	Wholesale Trade
DBP25			168 Miller Street	Repair service	2.3	9,697	81	Other Services (Except Public Administration)
DBP26			172 Miller Street	Heavy truck repair	2.2	7,688	81	Other Services (Except Public Administration)
DBP27			176 Miller Street	Electrical installation service	2.8	23,461	23	Construction
	TOTAL			Occupied Land	118.62	285,282		

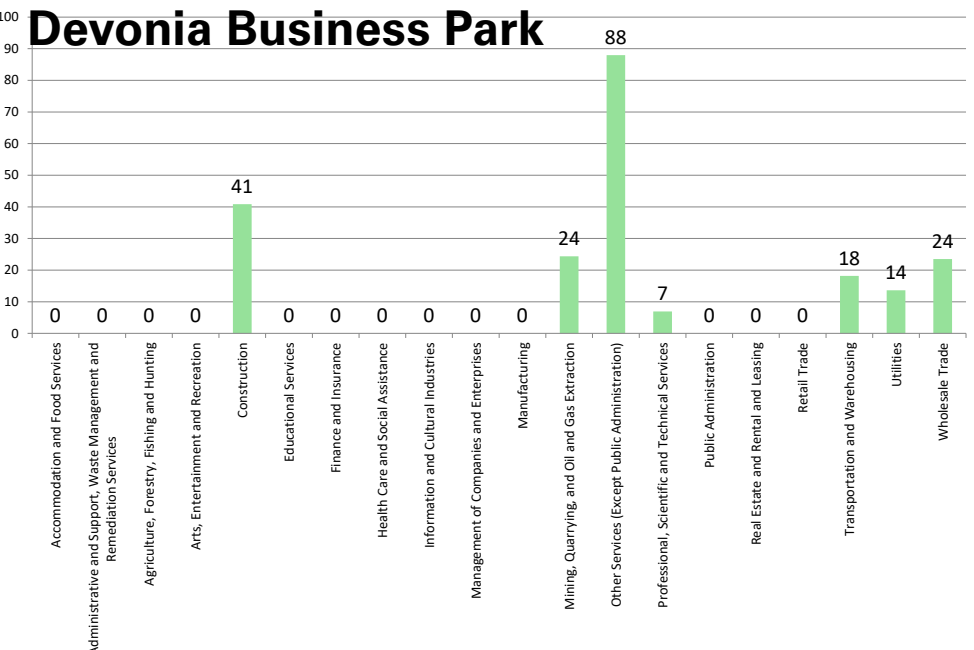
West Peripheral



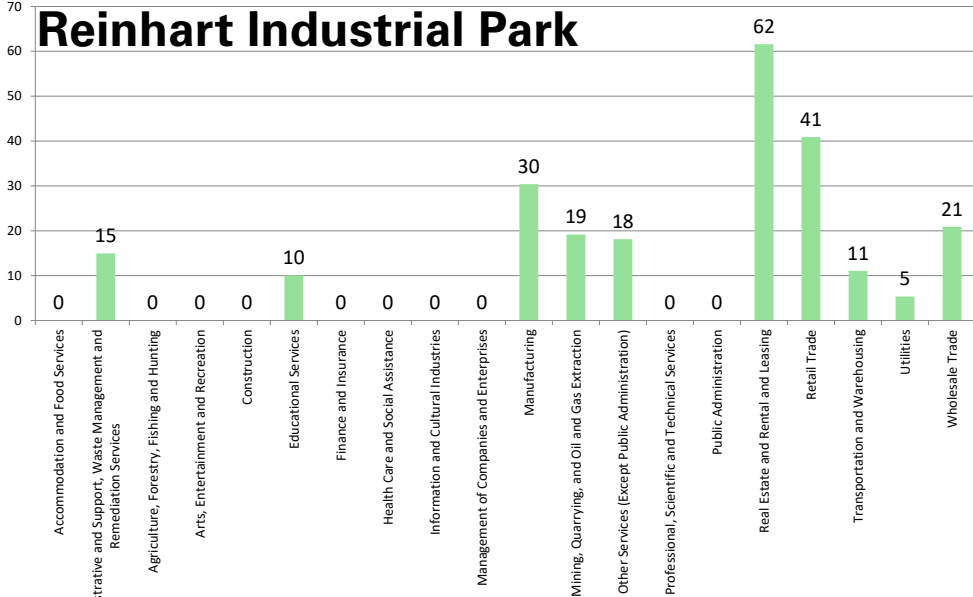
County Energy Park



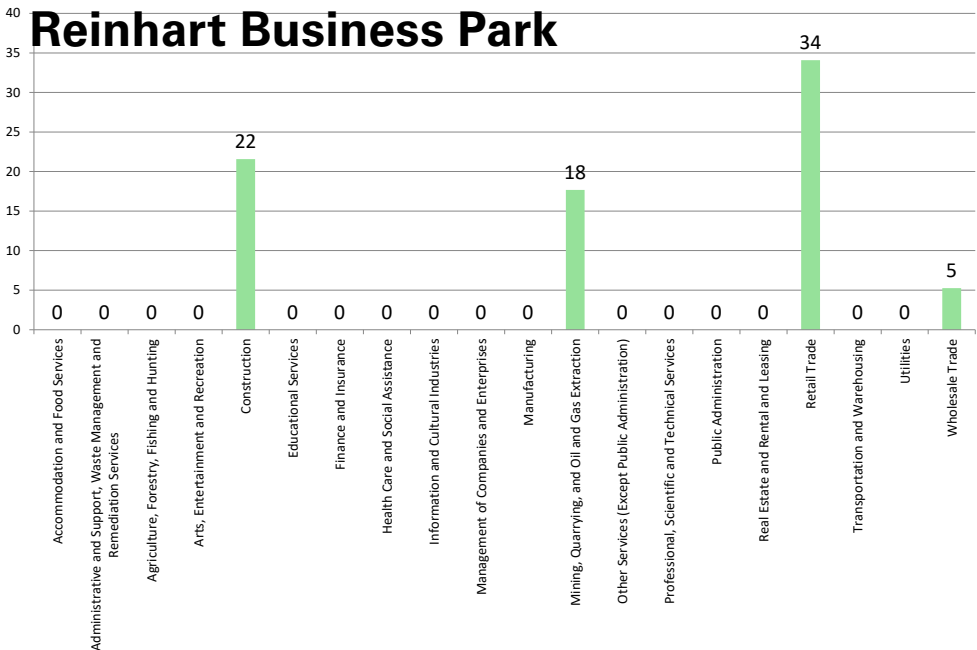
Devonia Business Park



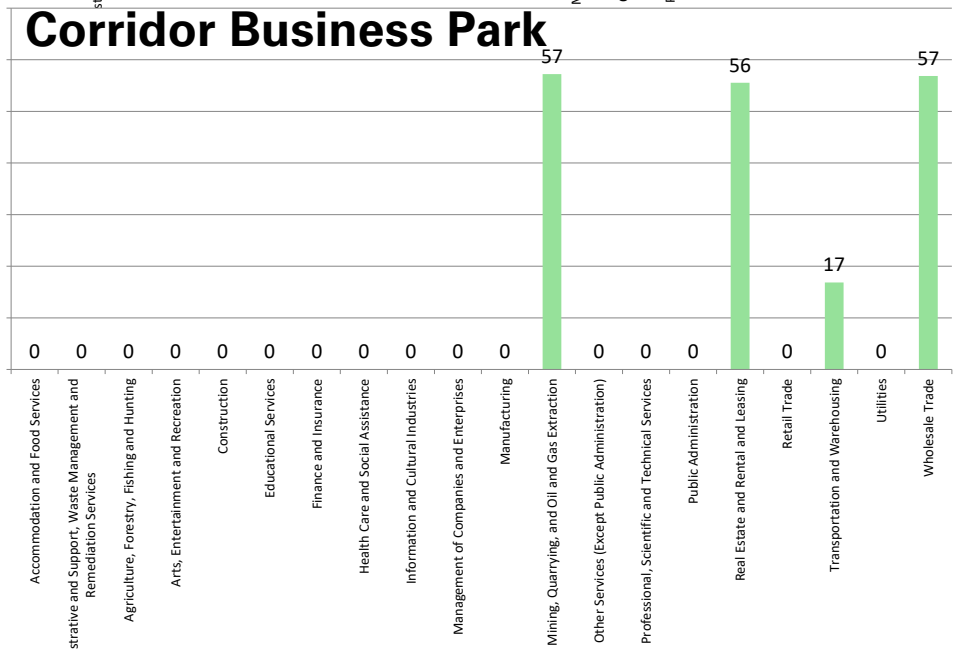
Reinhart Industrial Park



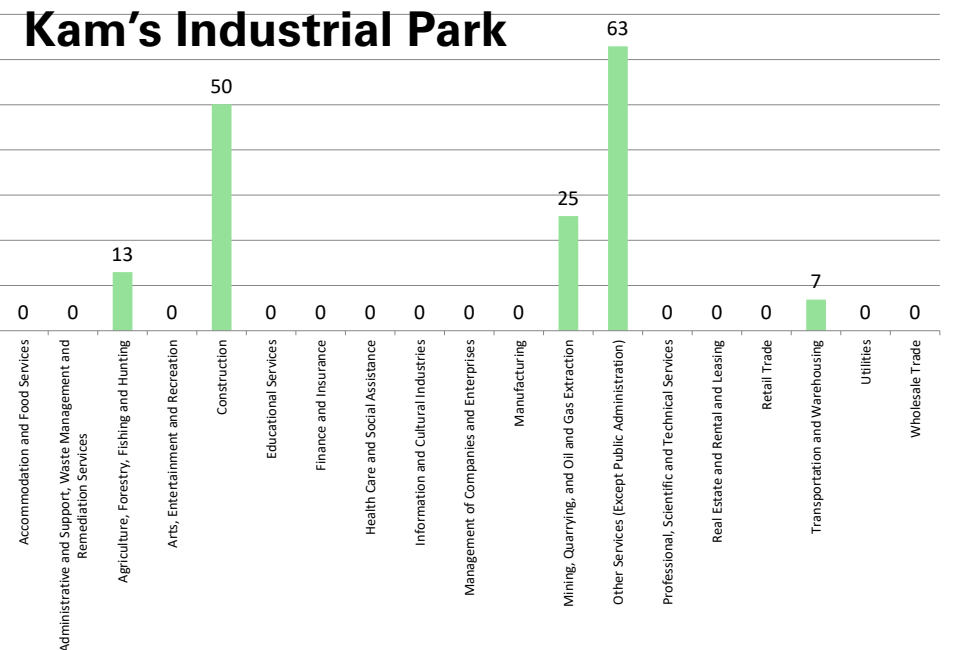
Reinhart Business Park



Corridor Business Park



Kam's Industrial Park



4.10 Rural Municipality (RM) East Sector

The map shown in **Figure 4-20** provides a visual overview of the RM East Sector's inventory and includes inventory in the R.M. of Britannia and R.M. of Wilton on the immediate periphery of Lloydminster.

Nodes in the RM East Sector are:

- Cenovus Energy
- Foote Industrial
- Northeast (NE) Shadow Area
- (Horizon Energy Park) - future industrial

Table 4-20 summarizes the RM East Sector while **Tables 4-21 & 4-22** detail the inventory of all the individual nodes in the RM East Sector, including vacancy, business count, percentage share of primary business uses, and NAICS categories.

Visually, **Figures 4-21, 4-22 & 4-23** illustrate the composition and mix of each of the respective nodes within the RM East Sector.

Miscellaneous observations:

- The Foote Industrial area benefits from convenient proximity to Lloydminster's southeastern boundary and near future residential growth areas.
- Currently, the Foote Industrial is experiencing demand for smaller owner-occupier condominium style formats with front loading bays and/or storage as "man-caves". With existing self storage in the area this could likely be a continued area of growth for low cost and stable cash-flow types of businesses.

Table 4-20. Rural Municipality East Sector Industrial Inventory Summary by Node

(Source: FBM and City of Lloydminster)

	Cenovus Energy	Foote Industrial	NE Shadow Area
Total Gross Land Area (ac)	655	75	21
Estimated Total Building Space (sq. ft.)	767,822 (including refinery/upgrader)	135,388	47,800
Estimated Building Site Coverage Ratio (FAR)	3.9%	3.8%	5.9%
Estimated Total building space vacancy (sq. ft.)	0	0	4,900
Number of vacant land without buildings (acres)	0	3	0
Number of Businesses	2	19	5
Number of Industrial Employees (est)	384	147	25
Employees per Developed Acre (Est)	0.6	1.8	1.4

Figure 4-20. RM East Sector Map
(Source: FBM with parcel data provided by Lloydminster)

RM East Sector
Business Inventory

- City Boundary
- RM East Sector Boundary
- Industrial Node Boundary
- 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

Real Estate and Rental and Leasing

Professional, Scientific and Technical Services

Management of Companies and Enterprises

Adminisitrative 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

Vacant Lot

Undeveloped

User Unknown

Future Industrial Land

Annexed Land

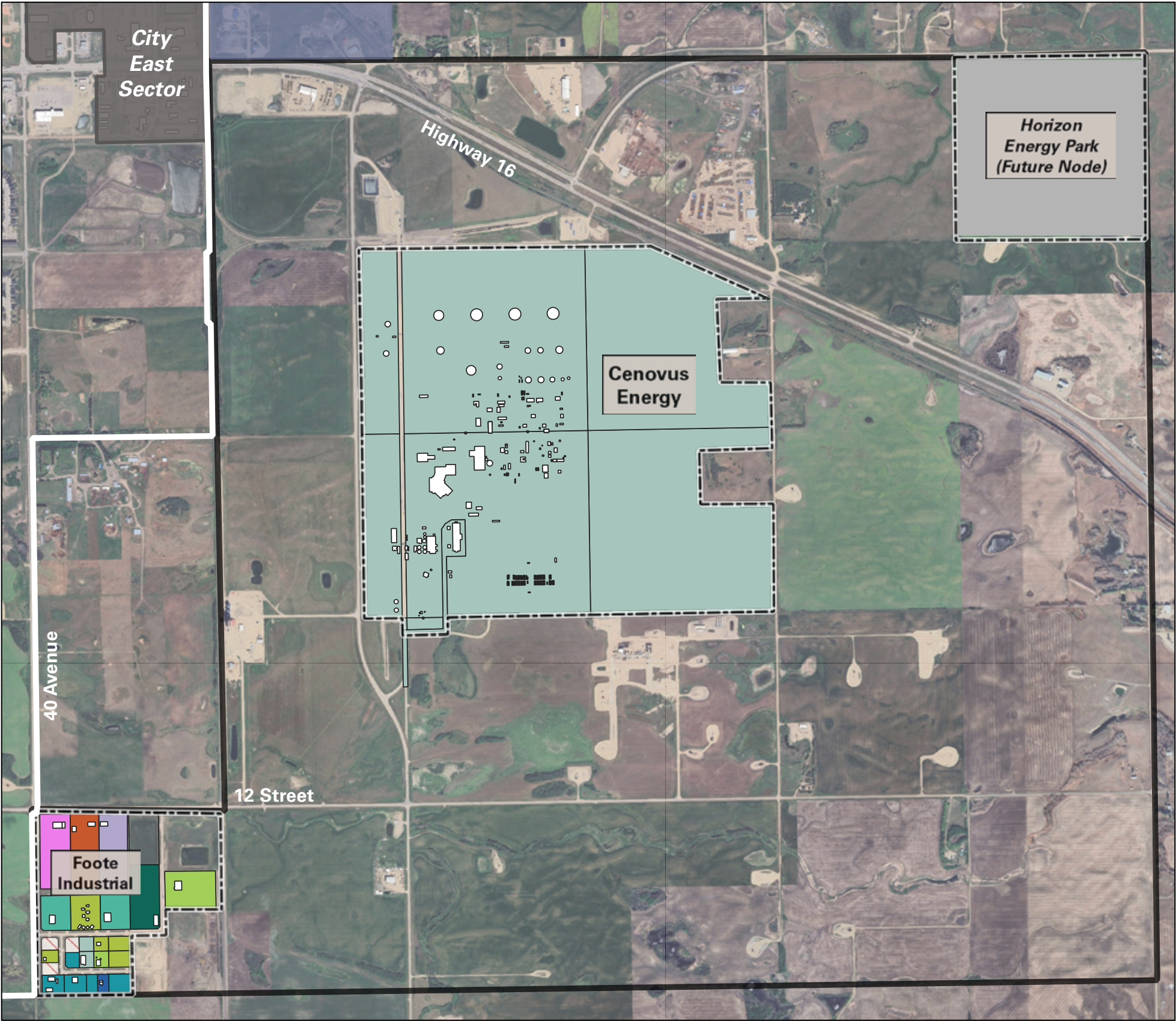
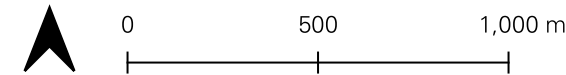


Figure 4-21. RM East Sector: Foote Industrial and Cenovus Energy Node Inventories by NAICS Industry
(Source: FBM with parcel data provided by Lloydminster)

Foote Industrial & Cenovus Energy
Nodal Business Inventory

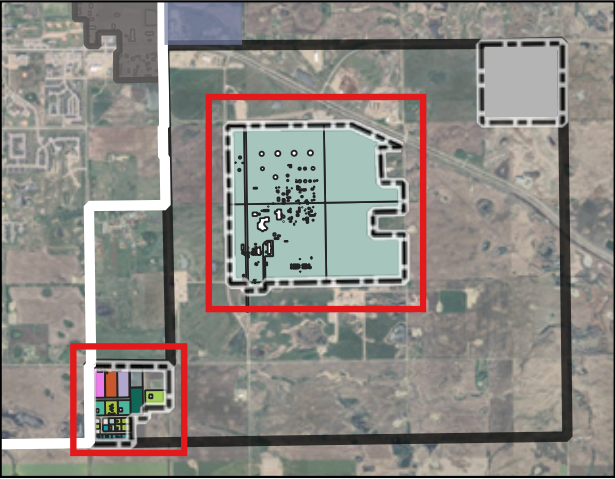
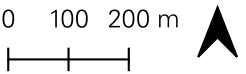
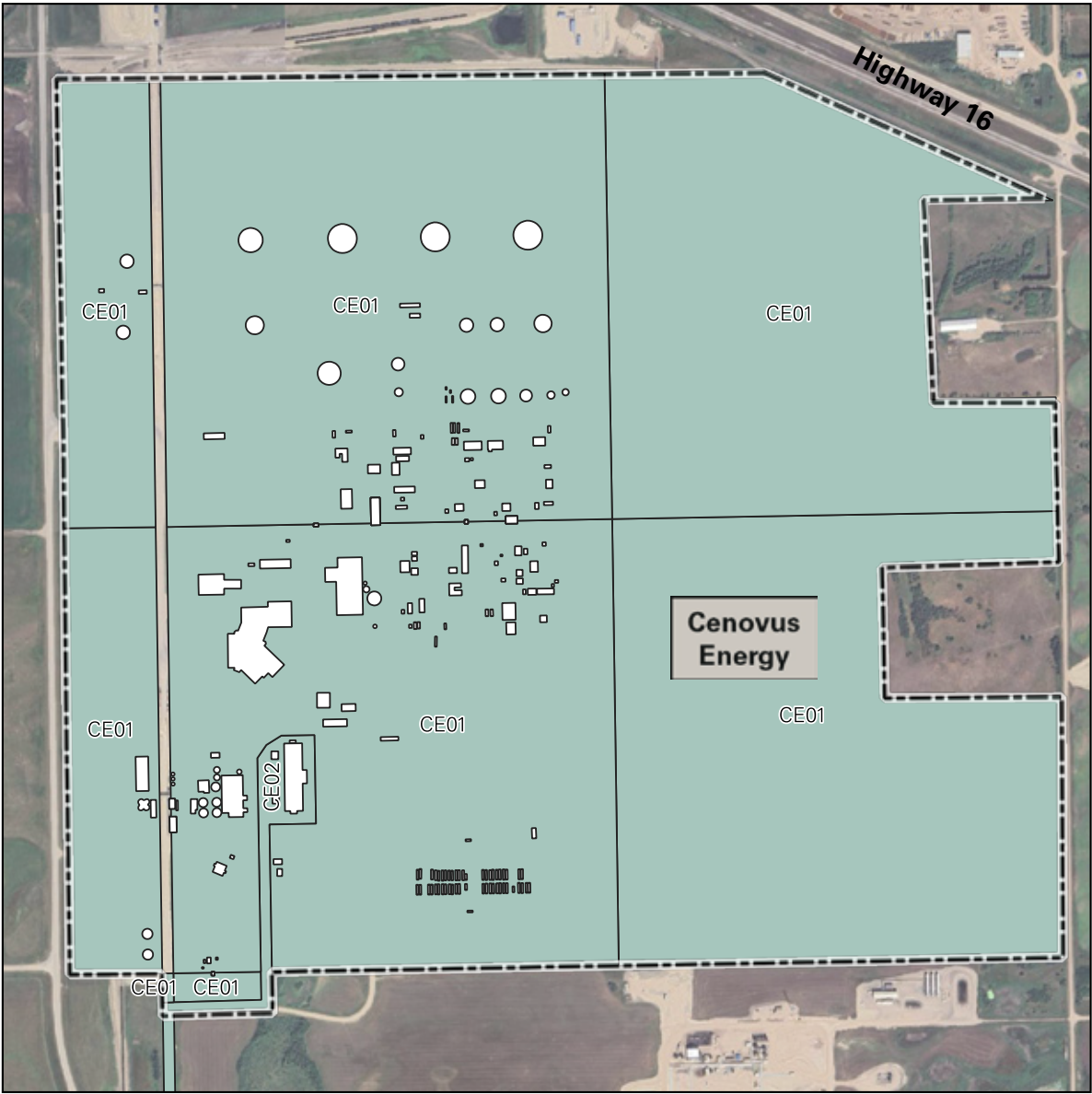
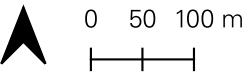
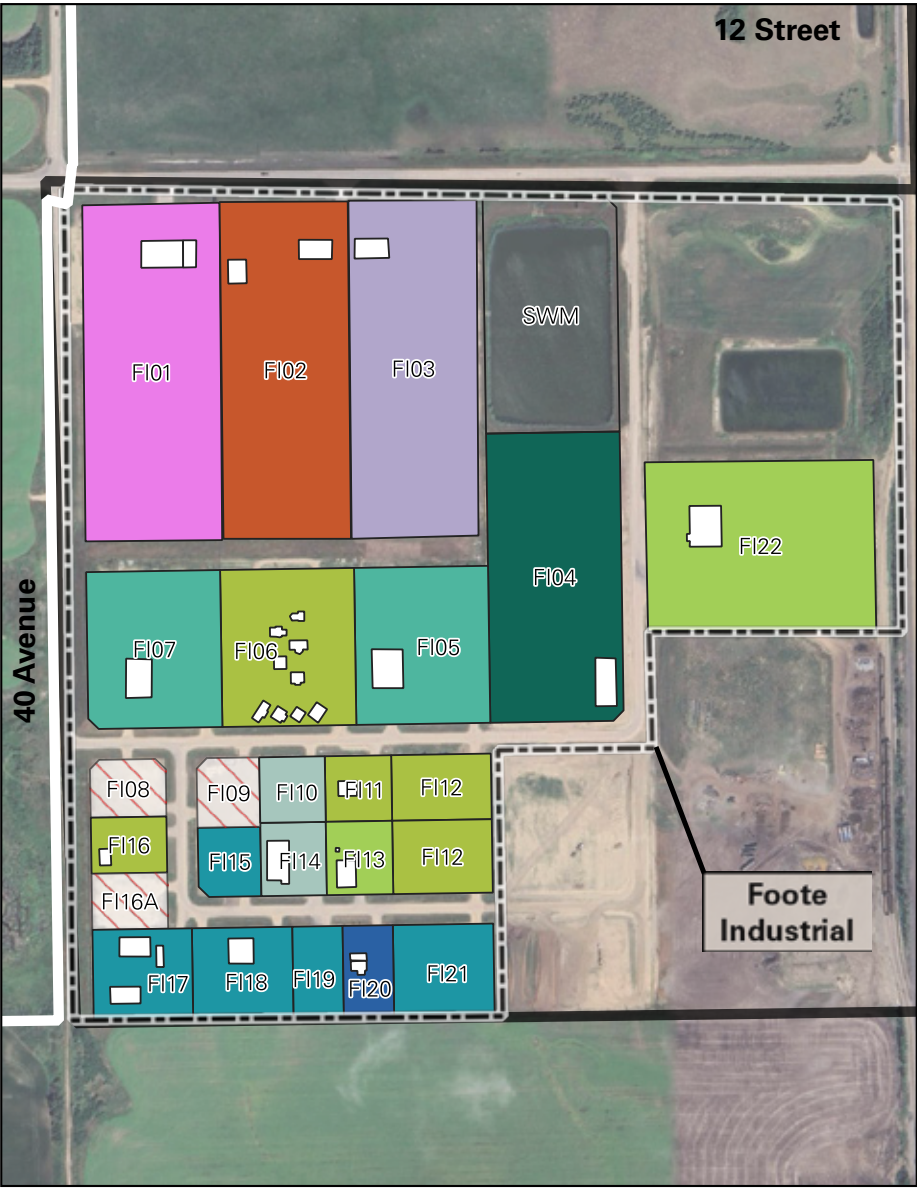


Figure 4-22. RM East Sector: Foote Industrial and Cenovus Energy Node Inventories by NAICS Industry
(Source: FBM with parcel data provided by Lloydminster)

RM of Britannia Northeast Shadow Plan
Business Inventory

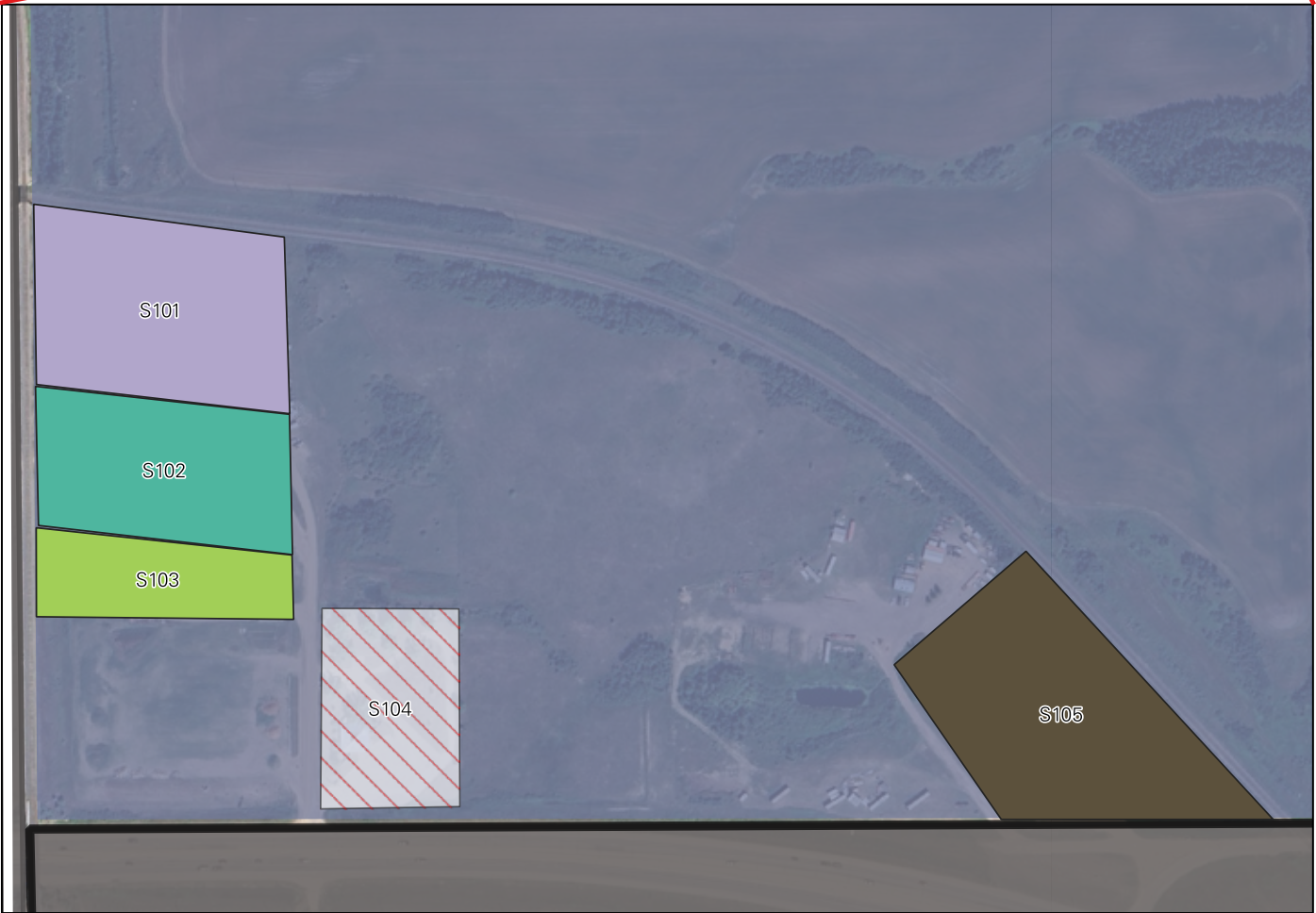
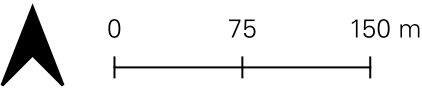
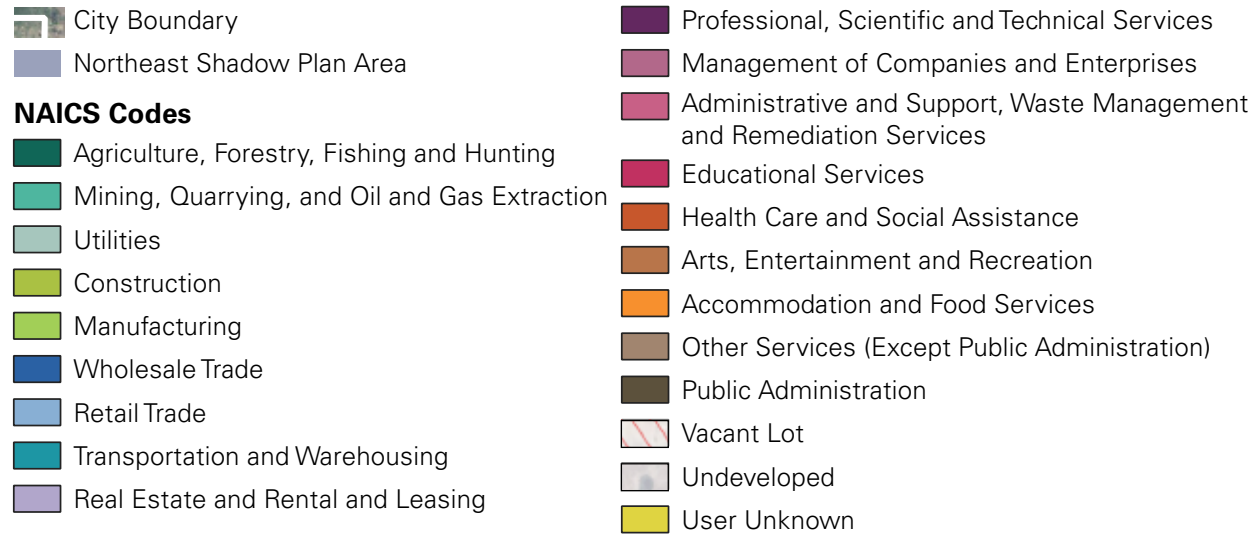
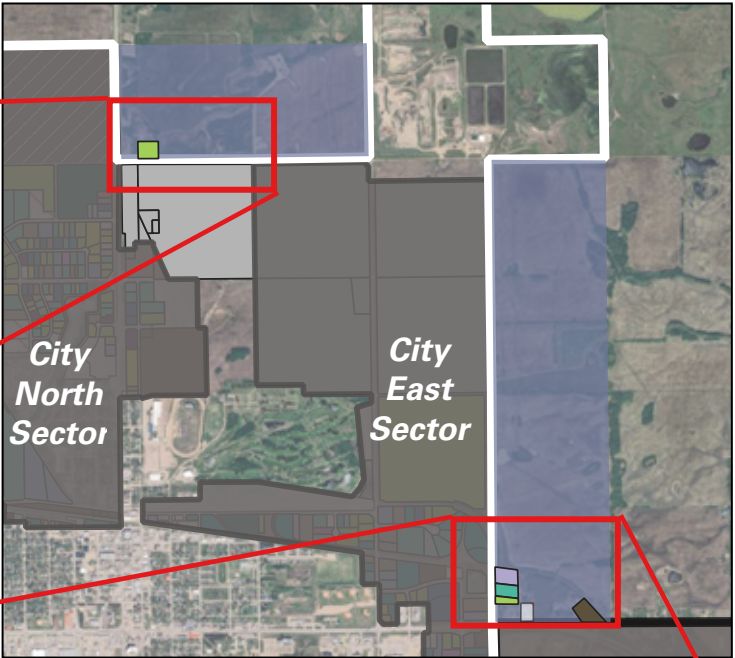
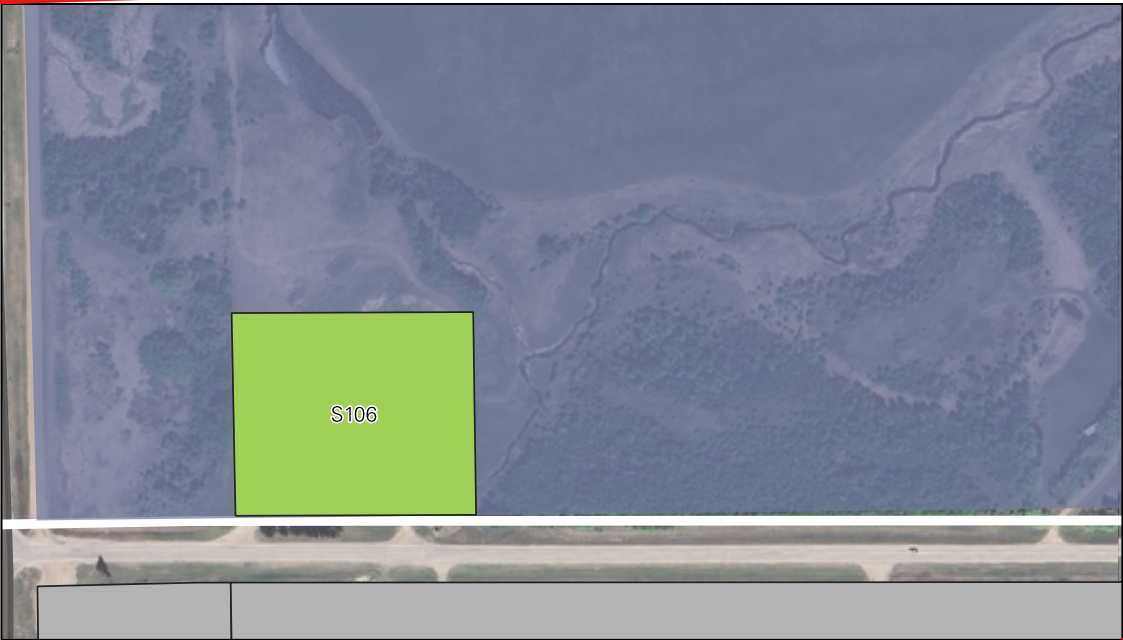


Table 4-21.Foote Industrial Park Business Inventory
(FBM)

Parcel #	Business Name	Civic	Street Address	Land Use	Lot Area (Acres)	Total Bldg Area (inc outbldgs) - sq. ft.	NAICS Code	NAICS Category
FI01			3917 12 Street		10.7	14,942	91	Public Administration
FI01			3917 12 Street	Internet service provider		0	51	Information and Cultural Industries
FI01			3917 12 Street	Fire station		0	91	Public Administration
FI02		A203	3909 12 Street	Ambulance	10.0	10,924	62	Health Care and Social Assistance
FI03			3909 12 Street	Self-storage facility	10.0	6,748	53	Real Estate and Rental and Leasing
FI04			3702 10 Street	Agricultural service	9.0	10,154	11	Agriculture, Forestry, Fishing and Hunting
FI05			3708 10 Street	Service to oil and gas extraction	4.9	12,142	21	Mining, Quarrying, and Oil and Gas Extraction
FI06				Construction	4.9	14,666	23	Construction
FI07			3804 10 Street	Oil and gas extraction	4.9	10,111	21	Mining, Quarrying, and Oil and Gas Extraction
FI08			906 39 Avenue		1.0	0		
FI09					1.0	0		
FI10				Utilities	1.0	0	22	Utilities
FI11				Concrete contractor	1.0	2,820	23	Construction
FI12				Construction	3.2	0	23	Construction
FI13				Concrete contractor	1.1	5,563	31-33	Manufacturing
FI14				Utilities	1.1	9,114	22	Utilities
FI15				Condo Storage	1.0	0	48-49	Transportation and Warehousing
FI16				Roofing contractor	1.0	1,905	23	Construction
FI16A					1.0			
FI17			904 39 Avenue	Truck transportation	2.1	12,818	48-49	Transportation and Warehousing
FI18				Truck transportation	2.1	6,404	48-49	Transportation and Warehousing
FI19				Condo Storage	1.1	0	48-49	Transportation and Warehousing
FI20					1.1		23	Construction
FI20				Construction		1,207	23	Construction
FI20				Equipment supplier		1,869	41	Wholesale Trade
FI21				Storage	2.1	0	48-49	Transportation and Warehousing
FI22			1009 37 Avenue	Industrial	9.0	14,000	31-33	Manufacturing

Table 4-22.Cenovus Energy Business Inventory
(FBM)

Parcel #	Business Name	Civic	Street Address	Land Use	Lot Area (Acres)	Total Bldg Area (inc outbldgs) - sf	NAICS Code	NAICS Category
CE01			Highway 16E Upgrader Rd	Utilities	647.3	718,065	22	Utilities
CE02			Wilton No. 472	Utilities	7.6	49,758	22	Utilities
	TOTAL			Occupied Land	654.89	767,822		

Table 4-23.NE Shadow Plan
(FBM)

Parcel #	Business Name	Civic	Street Address	Land Use	Lot Area (Acres)	Total Bldg Area (inc outbldgs) - sq. ft.	NAICS Code	NAICS Category
S101			4502 35 Avenue	Storage	4.3	17,600	53	Real Estate and Rental and Leasing
S102		#2	Buffalo Park	Service to oil and gas extraction	3.4	6,500	21	Mining, Quarrying, and Oil and Gas Extraction
S103		#1	Buffalo Park	Manufacturing	1.9	3,500	31-33	Manufacturing
S104			4502 35 Avenue		2.6	4,900		
S105			4828 47 Street	Fire department	5.0	8,400	91	Public Administration
S106			Hwy 17 N 67 Street	Manufacturing	4.2	6,900	31-33	Manufacturing
	TOTAL			Occupied Land	18.73	47,800		

5.0 Stakeholder Outreach

5.1 Introduction

Engagement is an essential component of the study process. To accurately obtain the most comprehensive data against which on-the-ground fieldwork can be integrated, the analysis included interviews with business people active in the industrial market in the area. From April 11, 2024 to July 4, 2024 Preferred Choice as directed by FBM with support from Lloydminster interviewed 10 stakeholders plus additional input from 2 realtors.

The following section summarizes the key findings from the stakeholder outreach session for the Lloydminster industrial market. Full results can be found in **Appendix A**.

5.2 Summary of Stakeholder Engagement Themes

Businesses and contacts interviewed were confident in Lloydminster as an excellent location for industry and growth. There are challenges that can impact the rate of growth. Insights shared were done in a manner to help Lloydminster become even better positioned for future growth.

During the stakeholder interviews a range of topics were discussed. Ten themes arose through these conversations as shown on **Figure 5-1** and summarized below:

Variety of land needs: A range of property sizes are needed by industrial users. One size does not fit all. The number of industrial land transactions are limited at any particular point of time. There are significant differences between one site to another so that apples to apples comparisons are not readily available. Some firms need larger lots and buildings while other firms need smaller sites for their business. There was a period of time when industrial land owners preferred to lease properties to business tenants and there were limited properties available for owner occupants. That has changed recently, and more owner occupant options are available.

Location features and amenities: Lloydminster is situated in the heart of a significant oil and gas and agricultural production area. There are many differences from one property to another property of similar size such as:

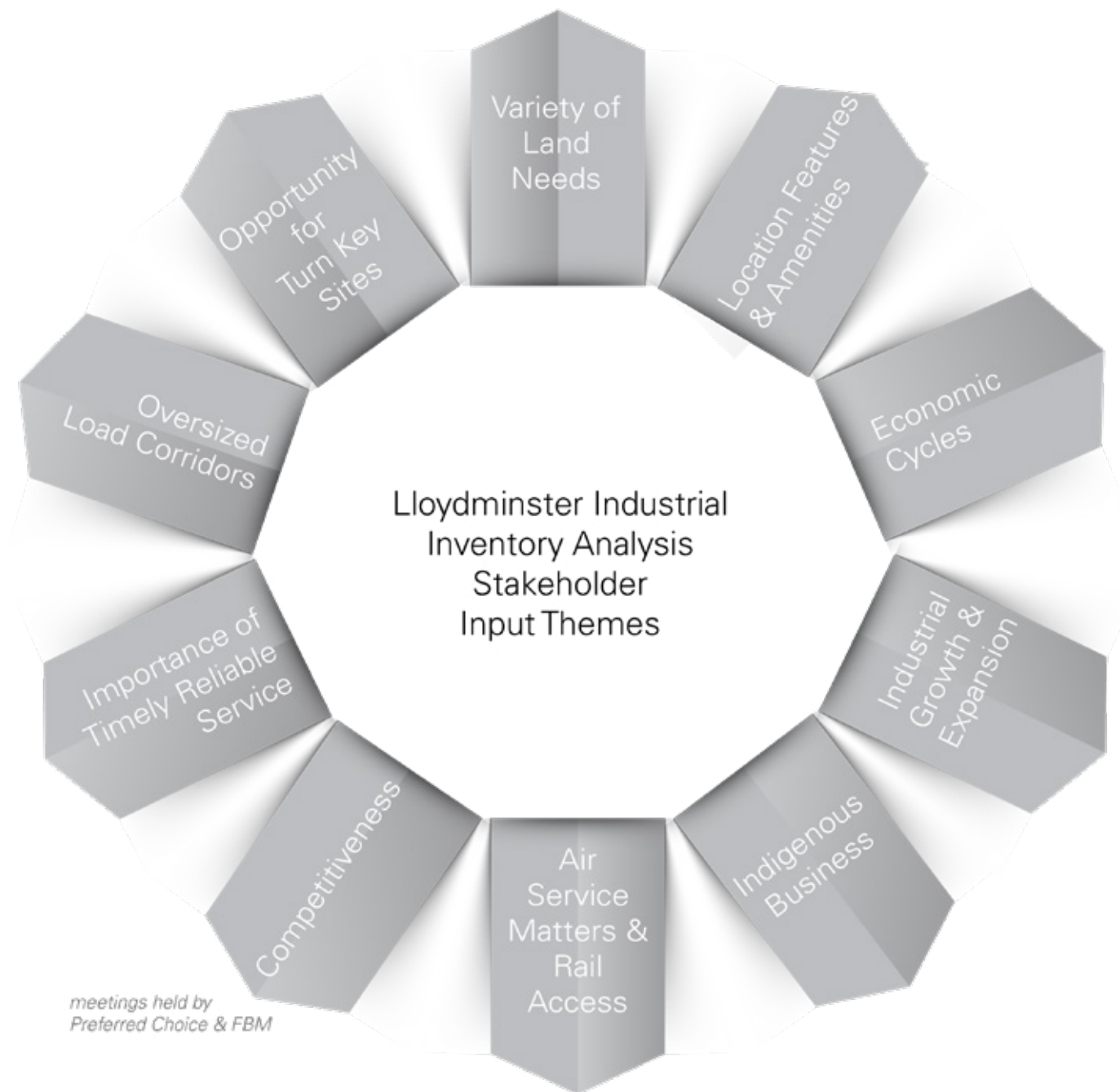
- *What is the location of the property?*
- *Which industrial park is it in?*
- *Is it in Saskatchewan or Alberta?*
- *Does the site have highway frontage?*
- *Is there rail through the site?*
- *What are the transportation linkages for production inputs and finished product shipments?*
- *Is there a crane(s) in the property and what are the specifications?*
- *What are the door sizes (width and height) of the building?*
- *What is the production space layout including building dimensions (L × W × H)?*
- *What are the HVAC, electrical, and other features of the property?*
- *What is the building condition?*
- *What is the site condition and environmental status?*
- *What is the level of earthworks done on the site? Is the site grading and drainage sufficient?*

In general, the location of Lloydminster is considered a good location for business on two major highways and a mid-point between Edmonton and Saskatoon with a market catchment of 150,000 people. CN (Canadian National) Railway and CPKC (Canadian Pacific [CP] and Kansas City Southern [KCS]) offer rail services in Lloydminster. Lloydminster has good utility services including water and sewer plus industrial power and gas to meet the needs of industry.

Economic cycles: Resource economic cycles continue to have a significant impact on the Lloydminster market. Companies noted the significant impact of resource economic cycles on the Lloydminster market. The last oil and gas sector economic downturn depressed industrial market lease rates by over 35%. One firm noted the Lloydminster economy is challenged as the market is the first to go down and the last to come back. Only recently has industrial lease rates moved above levels from 2013-14 before the last downturn. Another factor of note is the impact of senior government policy on the resource sector. These national and provincial policies can also impact firms and the economy of Lloydminster.

Figure 5-1. Industrial Inventory Analysis - Stakeholder Input Themes

(Source: Industrial Inventory Analysis Stakeholder Engagement Report, Preferred Choice & FBM, 2024)



Industrial growth and expansion: Future industrial growth opportunities include oil and gas innovations, agri-business, agri-value processing, biofuels, mining support businesses, and power generation. While traditional oil & gas and agribusiness activity have been mainstays of the Lloydminster economy a number of comments were made on the potential for further growth. A number of innovations in the oil & gas sector were developed in the Lloydminster area with potential for additional sector innovations. Further agri-business, agri-value processing, and biofuels were some of the noted areas with opportunities for the area. Mining support businesses for Potash and other minerals was a suggested opportunity. Additional power generation could be another opportunity for the community. Old properties redevelopment could open up some existing properties including in places with limited sites such as highway frontage. Further highway properties was noted as an area of market interest.

Air service matters: Air connections to Calgary and even Regina are important to a number of businesses. Good air service is important to industry, businesses, tourism, and leisure travel and the attraction & retention of people, professionals, and businesses. The loss of regular scheduled air service from WestJet is being actively addressed. A challenge of filling the gap with charter or regular service from another vendor is the disconnect that occurs from not being part of a larger airline that can offer ticketing and transfers onto other flights to destinations across the country and continent.

Competitiveness: Further consideration should be given to how Lloydminster's overall services to businesses compare to surrounding communities. Lloydminster needs to be aware of how its own policies, procedures, service, fees, rates, taxation levels, and overall service to businesses compare to the nearby municipalities of the County of Vermilion River, R.M. of Britannia No. 502, and R.M. of Wilton No. 472. In addition Lloydminster needs to be aware of incentives and cost of business in Vermilion, Kitscoty, Vegreville, and other centres. Some firms are also actively approached to relocate or establish a presence in the United States. The City needs to regularly connect with existing businesses and ensure a deep understanding of firms' needs and take proactive steps by the city to retain and encourage expansion of these existing firms.

Oversized load corridors: The mobility of goods, services, and people was important to stakeholders. An oversized load corridor would allow high and oversized shipments to be made easily from key industrial park sites. The maintenance and renewal of the road network within the municipality, connecting the area, and highways is a consideration of businesses, residents, visitors, and developers. Rail service improvements and access by industrial properties was an area suggested for Lloydminster to explore.

Opportunity for turnkey sites: If turnkey sites (where the costs for added features built into the price) were made available, this could entice more businesses. A suggestion was to explore options to offer land lease options on some available sites. Innovative sales and marketing may bring in additional businesses and increase absorption of land to realize more growth in the near-term.

Importance of timely reliable service: Assessment of municipal approval timelines may be needed, as well as further promotion of supports for industrial businesses. The municipal regulatory process must be competitive with other centres regarding criterion, specifications, timeliness, transparency, and clarity. There was a perception that while the Economic Development Department has been a good champion of growth, opportunities may be getting bogged down in the municipal approval process. One suggestion was to develop a roadmap so companies have a clear understanding of each approval process, requirements, decision timelines, and tips & tricks to do it well through a development guide for the process including a checklist

Indigenous business: The significance of Lloydminster as a centre for business for area First Nations such as Frog Lake and Onion Lake was noted by stakeholders. Indigenous business interests, community services, member services, employment, and economic activity are parts of the benefits of strong Indigenous participation in the economy and Economic Reconciliation.

6.0 Demand Analysis

6.1 Introduction

The following section will quantify future light and heavy industrial demand using a triangulation of employment growth, historic absorption and per capita estimates along with an estimated fair market share for future growth and land requirements, forecast over the next 10 years. The analysis will then lead to allocating industrial demand by building typology and format, including heavy, light, flex, and business park.

6.2 Demand Analysis Methodology

Three (3) different approaches were used to forecast the demand for additional industrial space in Lloydminster. These include an examination of 1) employment forecasts by sector, 2) the forecast of working age population, and 3) application of current space per capita ratio against future population growth.

Each of these singular methods will produce its own forecast, but in order to most accurately and realistically ensure sound market-driven forecasts, all of the methodologies are blended together for a weighted average. It is important to acknowledge the role that labour and population growth play in attracting demand, since no project can have success if it does not have the requisite labour force, skilled or otherwise to support the business.

1) Labour Force Approach

The first approach to forecasting industrial space demand examines future population growth, particularly those people in the labour force (15+ years) cohorts.

Table 6-1 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. This approach yielded a demand forecast to the year 2033 of just under 100,000 sf. While this is a lower than expected figure, this methodology takes into account that current vacancies are above the industry norm and therefore approximately 126,000 sq. ft. of space would need to be absorbed by existing space to support new construction. This may not always be the case, which is a factor in using a triangulated methodology to effectively find the true “sweet spot” for future demand.

2) Employment by Sector Forecast Approach

A second approach detailed in **Table 6-2** examines a historic employment growth as sourced to Statistics Canada and forecast with assumptions based on the growth of Lloydminster and the surrounding County and RM employment across all sectors realizing that not just employment trades work in industrial lands. In this approach, employment projections were made for specific NAICS industry sectors. These projections were associated with typical industrial employment floorspace standards as previously noted in **Table 4-1**.

This approach yielded an industrial forecast of just over 1 million sq. ft. (1,092,474 sq. ft.) by 2033.

3) Per Capita Population Growth

A per capita ratio is yet another reasonable input that is statistically based on Lloydminster’s actual inventory measured against its actual population (City + County + RMs). Currently, this ratio in Lloydminster is estimated to be 155 sq. ft. per capita. For the purposes of forecasting a ratio of 100 sq. ft. per capita has been applied which yields a forecasted demand for 156,800 sq. ft. of new space by 2033 as shown in **Table 6-3** (premised solely on population growth at current forecasts).

Summary Weighted Average

Since no one methodology is prudent and market economies can impact factors such as employment or labour, a weighted average of all three methodologies was used to more accurately estimate future demand. The result is shown in **Table 6-3** and shows that a reasonable forecast for demand over the next decade could approach 500,000 sq. ft. of new industrial floorspace (449,754 sq. ft.) requiring approximately 124 gross acres (50 ha).

This magnitude of demand suggests that given the availability of current parcels of existing and future proposed industrial lands, mostly in Lloydminster, that demand for the next decade could reasonably and feasibly be accommodated in potentially serviced and investment-ready lands.

Table 6-1. Industrial Labour Based Forecast

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

Lloydminster/Vermilion River/Wilton/Britannia											
Scenario	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033
	51,323	51,482	51,641	51,801	51,958	52,116	52,270	52,425	52,580	52,735	52,891
Lloydminster/Vermilion River/Wilton/Britannia Labour Force (15 + years)											
Scenario	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033
% aged 15+	79.5%	79.5%	79.5%	79.5%	79.5%	79.5%	79.5%	79.5%	79.5%	79.5%	79.5%
Lloydminster/Vermilion River/Wilton/Britannia											
Scenario	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033
	40,794	40,920	41,047	41,174	41,299	41,424	41,547	41,670	41,793	41,916	42,040
2023 Industrial Market Conditions											
Lloydminster / Vermillion / Wilton / Britannia											
Current Industrial Inventory			7,932,246								
Current Industrial Square Foot per capita			154.6								
Current Industrial Vacancy Rate			6.6%								
Occupied Industrial Inventory			7,409,258								
Occupied Square Foot per Employable Resident			181.6								
"Balanced" Industrial Vacancy Rate			5%								
"Balanced" Industrial Occupied Inventory			7,535,634								
Absorption Required to Support New Construction			126,376								
Projected Cumulative Occupied Industrial Space											
Scenario	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033
		7,432,189	7,455,191	7,478,265	7,500,968	7,523,740	7,545,984	7,568,295	7,590,671	7,613,114	7,635,623
Cumulative New Industrial Space Demand											
Scenario	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033
	-	103,445 -	80,442 -	57,369 -	34,666 -	11,894	10,351	32,661	55,037	77,480	99,989

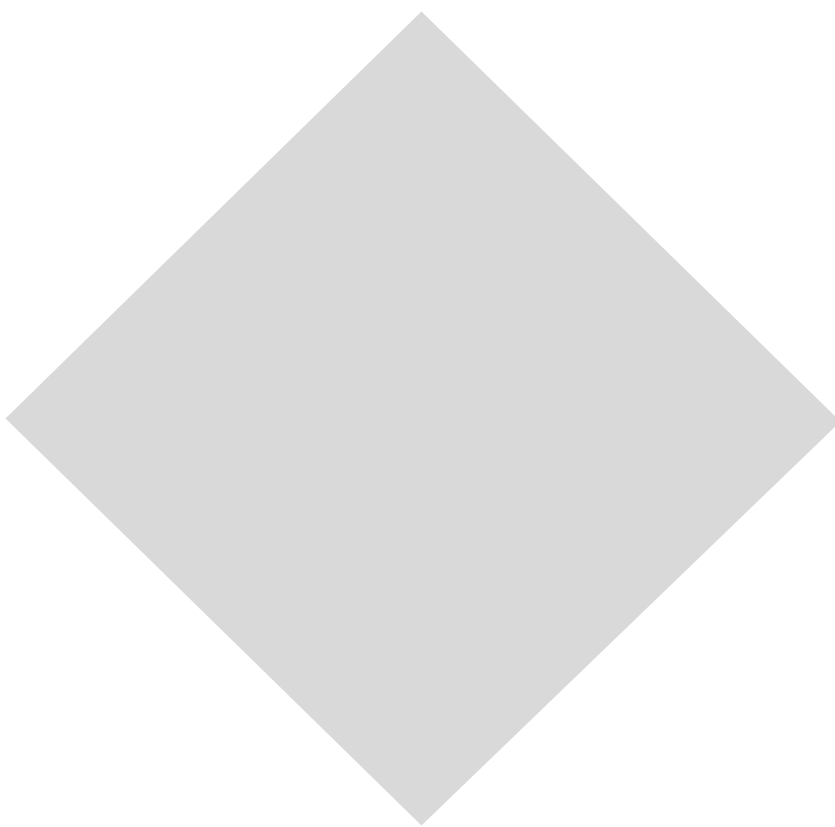
Source: Statistics Canada, Manifold Data Mining Inc., and FBM Ltd.

Table 6-2. Industrial Employment-Based Forecast
(Source: Statistics Canada, Manifold Data Mining Inc. & FBM)

EMPLOYMENT CATEGORY	Census Year	Manifold Data Mining	change per year 16-23	% of Employees in Industrial Related Uses	# of Employees in Industrial Related Uses	Forecasted Growth	Number of Employees in Industrial Related Spaces										
							2016	2023	2023	2024	2025	2026	2027	2028	2029	2030	2031
Agriculture, forestry, fishing & hunting	2,195	2,654	2.7%	25%	664	2.7%	682	700	720	740	760	781	802	824	847	870	894
Mining and oil and gas extraction	3,965	4,330	1.3%	85%	3,681	1.3%	3,727	3,774	3,822	3,870	3,919	3,969	4,019	4,070	4,122	4,174	4,227
Utilities	145	104	-4.6%	75%	78	-4.6%	74	71	68	65	62	59	56	53	51	49	46
Construction	2,210	2,263	0.3%	90%	2,037	0.3%	2,044	2,051	2,057	2,064	2,071	2,078	2,086	2,093	2,100	2,107	2,114
Manufacturing	1,035	1,090	0.7%	95%	1,036	0.7%	1,043	1,051	1,059	1,067	1,075	1,082	1,091	1,099	1,107	1,115	1,123
Wholesale Trade	895	1,020	1.9%	95%	969	1.9%	987	1,006	1,025	1,044	1,064	1,084	1,104	1,125	1,146	1,168	1,190
Retail Trade	3,630	4,006	1.4%	0%	0	1.4%	0	0	0	0	0	0	0	0	0	0	0
Transportation and warehousing	1,280	1,447	1.8%	95%	1,375	1.8%	1,399	1,424	1,449	1,474	1,500	1,527	1,554	1,581	1,609	1,638	1,667
Information and cultural industries	150	170	1.8%	25%	43	1.8%	43	44	45	46	46	47	48	49	50	51	52
Finance and insurance	775	780	0.1%	5%	39	0.1%	39	39	39	39	39	39	39	39	39	39	39
Real estate and rental and leasing	490	252	-9.1%	20%	50	-9.1%	46	42	38	34	31	29	26	24	21	19	18
Professional, scientific and technical services	1,415	1,266	-1.6%	20%	253	-1.6%	249	245	241	238	234	230	227	223	219	216	213
Management of companies and enterprises	15	12	-3.1%	0%	0	1.5%	0	0	0	0	0	0	0	0	0	0	0
Administrative and support & waste management	630	708	1.7%	50%	354	1.7%	360	366	372	378	385	391	398	405	411	418	425
Educational services	1,760	1,885	1.0%	5%	94	1.0%	95	96	97	98	99	100	101	102	103	104	105
Health care and social assistance	2,310	3,175	4.6%	5%	159	4.6%	166	174	182	190	199	209	218	228	239	250	262
Arts, entertainment and recreation	285	400	5.0%	10%	40	5.0%	42	44	46	49	51	53	56	59	62	65	68
Accommodation and food services	1,565	1,666	0.9%	0%	0	0.9%	0	0	0	0	0	0	0	0	0	0	0
Other services	1,455	1,734	2.5%	30%	520	2.5%	533	547	561	575	590	605	620	636	652	668	685
Public administration	700	818	2.3%	5%	41	2.3%	42	43	44	45	46	47	48	49	50	51	52
Total Workforce	26,905	29,780	1.5%														
Total Industrial-Related Workforce		11,431		38%	11,431	1.2%	11,572	11,717	11,865	12,016	12,171	12,330	12,493	12,659	12,829	13,003	13,180
Estimated Floorspace Ratio per Worker		694					694	694	694	694	694	694	694	694	694	694	694
Total Industrial Related Floorspace (sq.ft)		7,932,246					8,030,080	8,130,351	8,233,072	8,338,264	8,445,947	8,556,150	8,668,901	8,784,234	8,902,186	9,022,796	9,146,106
Annual New Industrial Space Demand (sq.ft)							97,834	100,270	102,721	105,191	107,684	110,203	112,751	115,333	117,952	120,610	123,311
Total New Industrial Space Demand (sq.ft)							97,834	198,105	300,826	406,018	513,701	623,904	736,655	851,988	969,940	1,090,550	1,213,860
Market Share of New Industrial Space Demand						100%	90%	90%	90%	90%	90%	90%	90%	90%	90%	90%	90%
Share of New Industrial Space (sq.ft)							88,051	178,294	270,744	365,416	462,331	561,514	662,990	766,790	872,946	981,495	1,092,474

Table 6-3. Industrial Demand Forecast Summary by Weighted Average Methodology
 (Source: Statistics Canada, Manifold Data Mining Inc. & FBM)

Forecast Model	Projected Average Annual Growth	Projected Total Growth over next 10-yr
Employment Growth Forecast (sf)	109,247	1,092,474
Labour Force Growth (sf)	9,999	99,989
Per Capita Population Growth	15,680	156,800
Blended Average (sf/yr) / Total	44,975	449,754
Current Avg Site Coverage Ratio		0.50
Avg Industry Standard Site Coverage Ratio		0.10
Gross Land Area Required (acres)		123.9
Gross Land Area Required (hectares)		50.1



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