ASBB

Council Presentation

Municipality of Shelburne

Contents:

01 Background

Background

Background

The municipality of Shelburne purchased two parcels of land for development.

The 103 Property was acquired from the Wardens and Rectors of the United Parishes of St. George and St. Patrick, by the Municipality of Shelburne, and is one of two strategic land acquisitions by MODS, alongside the 282-acre property near Exit 25. They are both located in Shelburne, Nova Scotia.

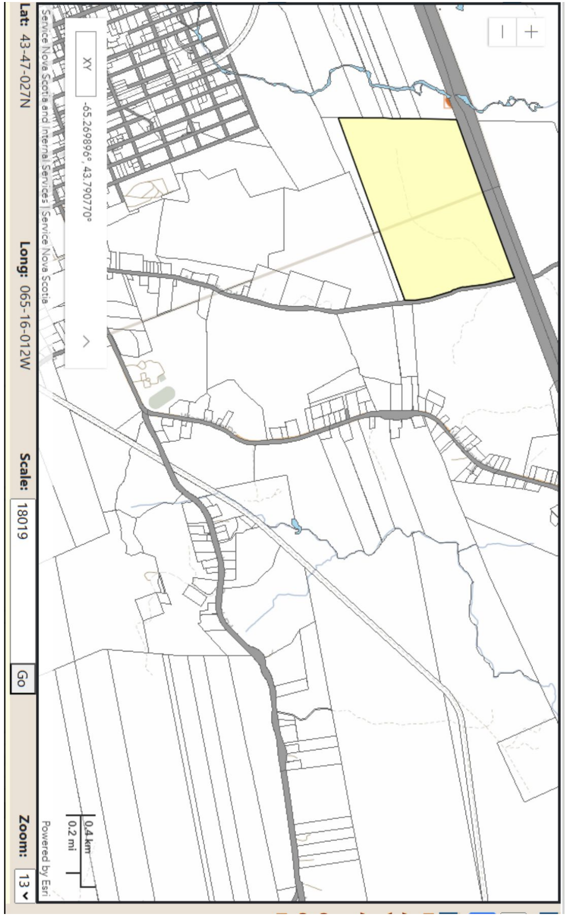
These parcels of land are located strategically, they are adjacent to highways which receive a lot of traffic. Both the properties promise a strong economic development opportunity for council and municipality.

Objectives and Study Approach

The objectives are to:

- Identify market gaps and opportunities
- Evaluate potential development opportunities and highest-and-best uses through evaluation.
- Assess investment readiness
- Evaluate economic and community benefits
- Develop an implementation roadmap

The study will use a phased approach that combines market analysis, community input, site readiness assessment, comparable case studies, and implementation planning to identify realistic development pathways for the properties.



02
Methodology

Stakeholder Methodology

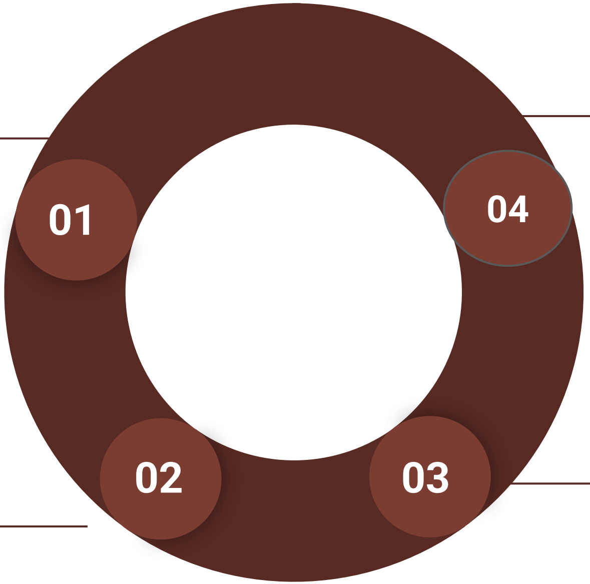
Surveys

- ASBB conducted two surveys, one with community (34 responses) and one with staff and council (8 responses)
- The goal was to understand:
- Public perceptions of the region's market readiness,
- identify community needs and market gaps
- Explore opportunities and priorities for future economic and community development.

Business Consultations (In-person)

ASBB conducted a series of in-person consultation sessions with local businesses and organizations
To understand:

- The challenges,
- Limitations, and gaps they are currently experiencing.
- A total of six businesses and organizations participated in the consultations.



Community Engagement Sessions (2 In person)

ASBB conducted two in-person community consultation sessions to

- Understand community members' perspectives on market readiness,
- Identify local needs and market gaps,
- Explore opportunities,
- Investments, and priorities that can support long-term economic and community development.
- We had 20-25 participants.

Stakeholder (1-on-1s)

ASBB conducted 8–10 individual stakeholder consultations with key stakeholders:

- This included representatives from the Province of Nova Scotia, Invest Nova Scotia,
- Various levels of government, local businesses,
- Community organizations,
- Industry leaders.

Project Methodology

1

Document Review:
This involved reviewing documentation about the parcel of land, establishing the scope, reviewing municipal planning strategies, land use by-laws.

2

Community Consultations:
A detailed community consultations methodology can be found in slide 6. The community consults were done to establish the mission, vision, and priorities of the community.

3

Jurisdictional Scan:
Were done to evaluate similar land development projects across different jurisdictions to evaluate feasibility and investment readiness across municipalities.

4

Market Analysis:
Gather demographic trends, employment figures, industry breakdowns, consumer expenditure patterns to identify opportunities and target industries

5

Final Reporting:
Combining the jurisdictional scan, market analysis, and community consultations, potential developments were identified and an implementation roadmap was developed.

03
What We Heard

Key Insights From Stakeholder Consults (Business & Community)

Area	Description
1 **Quality of Life and Sense of Peace**	Residents and businesses consistently identified Shelburne's natural beauty, waterfront, heritage, safety, community trust, and small-town atmosphere as its strongest assets. These characteristics were viewed as the foundation for attracting and retaining new residents, visitors, entrepreneurs, and investment.
2 **Gaps in everyday services**	A major theme was that residents often have to leave the community to access basic goods and services, such as healthcare, food and grocery options, retail and shopping, and banking and financial services.
3 **Workforce shortages**	Businesses identified workforce capacity as one of the biggest constraints to future development, with barriers including, shortages of skilled labour; difficulty attracting and retaining workers; aging demographics; limited housing options for employees.
4 **Improved investment readiness**	Businesses identified that Shelburne's future growth depends on becoming more prepared for investment. Key needs included: clearer investment opportunities; infrastructure readiness; workforce availability; stronger destination branding; support for entrepreneurs and new businesses.
5 **Growth Sectors**	Participants identified several areas where Shelburne has potential for future investment: including tourism, marine industries, remote work and technology, housing and residential development, retail, recreation, arts, renewable energy, and light industry

Gaps Identified by Community

To evaluate key gaps and market opportunities, we identified the key gaps raised through community engagement (business and public engagement), where we spoke to the community residents, and businesses. The following gaps were raised in the community engagements and give us a strong idea of what the community would like to see and is lacking in.

Limited local retail and commercial services

There are gaps in grocery options, specialty food retailers (delis, bakeries), and other shopping services, resulting in residents leaving the area for basic needs.

Limited employment opportunities and large employers

Residents identified a lack of availability of quality jobs and opportunities for youth and working-age residents, as well as large employers that hire many people and provide benefits.

Housing Availability

Residents identified a need for additional affordable residential units to support population growth and workforce needs. This will also help attract population, skills workers, investors and businesses that can create employment opportunities

Sustainable infrastructure and recreation/health facilities

Residents identified a need for more recreation facilities, healthcare infrastructure, social spaces, and community activities.

Improved infrastructure will also play a big role in workforce retention.

Gaps Identified (Community Survey)

This slide breaks down the key gaps identified by the community and delves into the long term impacts and importance of addressing the gaps.

01	28% of residents identified retail and amenities as missing from Shelburne, 56% travel outside of Shelburne to shop for goods.	• There is a lot of consumer spending leakage, especially when it comes to retail, with more than half of the residents leaving Shelburne to shop
02	16.2% want to see more local employment, and 28% identify limited jobs as a key barrier to economic growth	• When asked what community outcomes future development should prioritize, local employment was a key point, as well as improved services, and housing.
03	21.5% identify housing costs as a barrier to economic growth.	• This is a barrier in terms of accommodating population and employment growth and also with retaining migrants and skilled workers.
04	85.3% regularly travel outside of MOS for recreation, and 13.2% would like to see recreation expanded	• 83% travel outside of Shelburne for shopping, health and recreation • This also has a long term impact of attracting and retaining people, businesses and investors to the community.

SWOT (Business)

A SWOT analysis is a strategic tool used to assess internal strengths and weaknesses, as well as external opportunities and threats, to support program planning and service improvement.

Strengths

- Quality of life, natural scenery, community trust, and small-town character were consistently identified as core competitive advantages.
- Waterfront assets, heritage, beaches, safety, and a welcoming community create strong business demand.

Weaknesses

- Youth retention, workforce development (and retention), destination branding, investment readiness, and protecting community identity were identified as weaknesses.
- The common thread is balanced growth that creates jobs while preserving place-based / small town feeling of place.

Opportunities

- Tourism, healthcare and senior services, housing, remote work, recreation, renewable energy, local retail, arts, and light industry emerged as growth areas.
- These opportunities build on Shelburne's lifestyle appeal and underused market potential.

Threats

- Workforce and skilled labour shortages, housing affordability, childcare access, transportation, and funding were raised as growth constraints.
- Participants also noted taxation, limited amenities, aging demographics, and resistance to change.

04

Key Gaps & Market Opportunities

What Retailers Look for Before Entering a Market

Retailers assess whether a market has enough nearby customers, easy access, future growth and enough spending to support a new location. The examples below show how these conditions have supported retail development in other communities.

Condition	Description and Examples
Trade-area size	• Retailers count all residents who are likely to shop at the location, not only people living within the municipality. • The number of customers needed depends on the store format. A specialty shop needs fewer customers than a supermarket or large chain. • **Example:** The Town of Bridgewater of Nova Scotia has 9,626 residents, but its wider trade area reaches 71,078 people. The study found demand for about 195,000 sq. ft. of new retail, including 30,173 sq. ft. of grocery space.
Customer concentration and access	• Retailers assess how many customers live or travel within a practical walk or drive time. • Concentrated housing, nearby workplaces and strong road traffic help one location receive regular customer visits. • **Example:** Downtown Bridgewater has more than 5,300 residents within a 20-minute walk. The study linked this concentration to opportunities for local shops, dining and mixed-use development.
Growth outlook	• Retailers prefer markets where population, households and income are expected to increase. • Growth in housing adds customers and gives retailers more confidence that sales can grow over time. • **Example**: Alberta's City of Fort Saskatchewan's retail trade area was expected to grow from 38,700 to 46,000 residents over ten years, an increase of about 19%. Its retail study found that this growth would increase support for new shops and services.
Spending and market capture	• Retailers measure how much trade-area spending is captured by local businesses and how much is spent elsewhere. • A market opportunity is identified when a realistic increase in local spending creates measurable demand for new store space. • **Example:** Alexandria, Ontario retained 52.7% of trade-area spending. A 5-percentage-point increase in local market share was projected to create demand for 152,613 sq. ft. of new retail by 2031, including 22,025 sq. ft. for grocery and specialty food retail.

Typical Retail Market Thresholds and Trade Area

Retail Type	Typical Trade Area Population	Approximate Rural Density	Typical Drive Time	Approximate Distance	Primary Source(s)
Convenience Store (Irving, Circle K, Needs)	1,500–5,000	10–50 people/km^2	5–10 minutes	3–8 km	ICSC; RadiusMapper; Geod
Small Grocery / Independent	5,000–10,000	15–50 people/km^2	10–15 minutes	5–10 km	University of Minnesota Extension; Geod
Sobeys / Foodland	8,000–20,000	20–75 people/km^2	10–20 minutes	8–15 km	ICSC Retail Market Analysis; Geod
Canadian Tire	25,000–60,000	40–100 people/km^2	20–30 minutes	15–30 km	MIT Center for Real Estate; ICSC
Home Depot	80,000–150,000	Variable	20–30 minutes	20–35 km	MIT Center for Real Estate; ICSC
Walmart Supercentre	60,000–120,000	75–200 people/km^2	20–40 minutes	20–40 km	MIT Center for Real Estate; Wal-Mart geography research
Costco	150,000–300,000+	Generally urban	30–60+ minutes	30–60+ km	MIT Center for Real Estate; RadiusMapper
IKEA	500,000–1,000,000+	Major metropolitan markets	45–90 minutes	40–100 km	MIT Center for Real Estate; ICSC destination retail guidance

- Shelburne County has roughly 13,000–15,000 people spread over about 3,700 km^2, giving a density of only 3–4 people/km^2.
- 5,000–10,000 people: grocery store, pharmacy, bank, local services.
- 20,000–40,000 people: Canadian Tire, Kent, regional shopping.
- 50,000–80,000 people: Walmart becomes more feasible.
- 150,000–300,000+ people: Costco becomes viable.

Current Retail Market Gaps

Shelburne county has meaningful household spending and steady growth, but four market conditions reduce the sales available to larger retailers: a small trade area, dispersed customers, gradual growth and spending that leaves the community.

Relatively small trade area size

Shelburne county's estimated trade area includes about 14,399 people. This provides fewer regular customers to support supermarkets and other large-format stores.

Fewer current customer concentration

Shelburne county has only 12.5 residents and 6.1 households per inhabited km^2. Fewer nearby customers means lower and less predictable traffic around one retail location.

Opportunity to grow population in LR

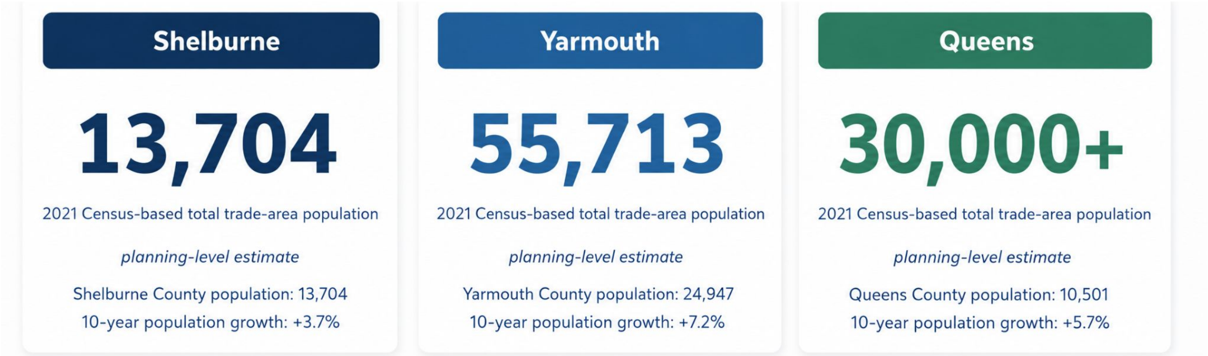
Over ten years, population is projected to grow by 3.7%, households by 8.5%, and household income by 19.2%. Retail demand is increasing, but it will build gradually.

Current smaller total retail spending

Shelburne county households generate $374.1 million in annual consumption, compared with $665.1 million in Yarmouth. Spending per household is similar, but fewer households reduce the total market size and many rely on travelling outside the county.

Market Gap 1: Relatively Small Trade Area Size

A retail trade area includes the people likely to shop at a location, not only municipal residents. Using road access, competing retail centres and expected shopping patterns, Shelburne County's total trade area is smaller than both Yarmouth's and Queens Counties.



- Retail analysis studies divide markets into primary, secondary and tertiary areas based on road access, distance, competing retail centres and shopping patterns. The total trade area includes the full population of every unique community assigned to the three levels. The same approach was applied here at a planning level.
- Shelburne's trade area includes the Town and District of Shelburne as the **primary area**, Lockeport as the **secondary area,** and Barrington and Clark's Harbour as the **tertiary area**. Yarmouth's trade area includes the Town and District of Yarmouth, Argyle and Yarmouth 33 as the **primary area**; Clare, Barrington and Clark's Harbour as the **secondary area**; and Digby, Bear River (Part) 6, Shelburne and Lockeport as the **tertiary area**.
- Queens' **primary area** includes the Region of Queens Municipality, Medway River 11, Ponhook Lake 10 and Wildcat 12. Its **secondary area** includes Lockeport, western Lunenburg and eastern Shelburne, while its tertiary trade area includes the Town and District of Shelburne, as well as tourism and seasonal populations.

Key Takeaway: Shelburne County's total trade area is about four times smaller than Yarmouth's and one-fifth the size of Bridgewater's. This gives large retailers fewer regular customers and helps explain why smaller, locally focused retail formats are more realistic for Shelburne County.

Market Gap 2: Low Customer Concentration

Retailers need customers to live close enough to visit one location regularly. Shelburne county has 14,303 residents spread across 1,140 km^2 of inhabited area, while Yarmouth has 26,432 residents within 900 km^2. This gives Shelburne county fewer nearby customers around each potential store location.

Shelburne

12.5
residents per inhabited km^2

Total land area	**2,463 km^2**
Inhabited area	**1,140 km^2**
Households per inhabited km^2	**6.1**

Yarmouth

29.4
residents per inhabited km^2

Total land area	**2,122 km^2**
Inhabited area	**900 km^2**
Households per inhabited km^2	**13.4**

Queens

6.9
residents per inhabited km^2

Total land area	**2,393 km^2**
Inhabited area	**1,586 km^2**
Households per inhabited km^2	**3.4**

- A scan of retail analysis studies shows that retailers benefit from a dense, accessible customer base near one location. The Shelburne county market is much more spread out.
- Shelburne county has 12.5 residents per inhabited km^2, compared with 29.4 in Yarmouth. It also has 6.1 households per inhabited km^2, less than half of Yarmouth's 13.4.
- Shelburne county's inhabited area covers 1,140 km^2, compared with 900 km^2 in Yarmouth, despite having fewer residents. Retailers cannot rely as heavily on a wider catchment because longer travel distances reduce visit frequency, increase travel and delivery costs, and make customer traffic less predictable.

Key Takeaway: Shelburne county is more concentrated than Queens county but much less concentrated than Yarmouth. Its customers are spread across a larger area, reducing the number of regular shoppers available near one retail location.

Market Gap 3: Opportunity to Strengthen Market Growth

Retailers are attracted to markets where customers, households and spending power are increasing. Shelburne county is projected to grow across all three measures, but at a more gradual pace than the comparison markets, creating an opportunity to build retail demand over time.

	Shelburne	Yarmouth	Queens
10-year population growth	+3.7%	+7.2%	+5.7%
10-year household growth	+8.5%	+11.2%	+12.6%
10-year household income growth	+19.2%	+29.9%	+32.0%

- A scan of retail analysis studies showed that Bridgewater, Nova Scotia projected 7.1% population growth over ten years, while Fort Saskatchewan, Alberta projected about 19%. Both studies linked customer growth with stronger support for new shops and services.
- Shelburne county's population is projected to grow by 3.7%, compared with 7.2% in Yarmouth and 5.7% in Queens county. This means that the Shelburne county retail market is growing, but demand will build more gradually.
- Shelburne county's number of households are expected to grow by 8.5%, while average household income rises by 19.2%. These gains can support additional retail demand even when population growth is moderate.

Key Takeaway: The Shelburne county market is expanding at a measured pace. The strongest opportunity is for smaller and flexible retail formats that can serve current demand and grow as the number of households and household income increase.

Market Gap 4: Smaller Total Spending Market

Retailers look at both the total spending available and how much of it is captured locally. Shelburne county households spend almost as much per household as Yarmouth households, but the smaller market and frequent shopping trips outside the municipality reduce sales available to local businesses.

Shelburne

$374.1M
annual household consumption

Consumption per household	**$53,873**
Total annual expenditure	**$468.5M**
Share of Yarmouth market	**56%**

Yarmouth

$665.1M
annual household consumption

Consumption per household	**$55,269**
Total annual expenditure	**$834.3M**
Share of Yarmouth market	**100%**

Queens

$243.4M
annual household consumption

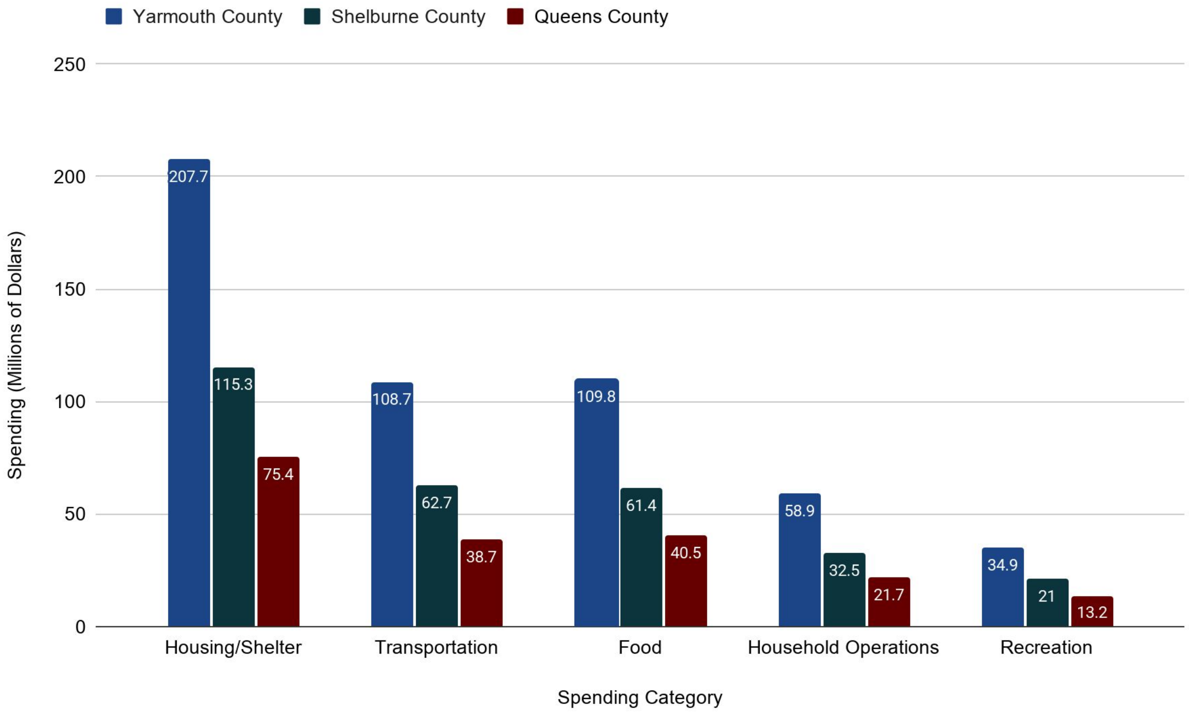
Consumption per household	**$44,802**
Total annual expenditure	**$306.4M**
Share of Yarmouth market	**37%**

- A scan of retail analysis studies showed that the town of Bridgewater of Nova has about $1.19 billion in trade-area spending potential. Shelburne county generates $374.1 million in annual household consumption, compared with $665.1 million in Yarmouth and $243.4 million in Queens county.
- Shelburne county households spend about $53,873 annually, close to Yarmouth's $55,269. The main difference is the number of households, which makes Shelburne county's total market only 56% of Yarmouth's.
- The community survey found that 85.3% regularly travel outside Shelburne county for services and amenities, while 55.9% identified shopping for goods as their main reason for travel. This shows an opportunity to capture more existing spending locally.

Key Takeaway: Shelburne county households have meaningful spending power, but the total spending market is smaller than Yarmouth's and much of the demand is not captured locally. With 85.3% of respondents regularly travelling outside Shelburne county for services and amenities, local businesses have fewer consumer dollars available to support additional retail.

Top Five Areas of Household Spending

Households in Shelburne county, Yarmouth and Queens county spend the most on the same five areas outlined below. Together, these categories account for about 78% of annual household consumption in each municipality.



This graph displays the top spending categories, aggregated (household spending data consolidated), across the tri-county region. The top spending category is housing/shelter.

Shelburne’s Retail Market Readiness

This report card shows how Shelburne county performs across the four conditions that influence whether new retail can operate successfully. Green means the condition strongly supports new retail, yellow means it partly supports retail or is better suited to smaller/local businesses, and red means it creates a major challenge for attracting larger stores.

Condition	Description	Shelburne’s Performance
Trade-area size	Shelburne county’s estimated trade area includes about 14,399 people, compared with approximately 58,479 in Yarmouth and 71,078 in the Bridgewater example. This provides fewer regular customers to support supermarkets and other large stores.	Red
Customer concentration and access	Shelburne county has 12.5 residents and 6.1 households per inhabited km^2 across a 1,140 km^2 inhabited area compared to 29.4 in Yarmouth’s case and 19 in Queens.	Yellow
Growth outlook	Shelburne county’s population is projected to grow by 3.7%, while household income by 19.2% over ten years. Whereas Yarmouth & Queens county’s population and income growth are significantly higher.	Yellow
Spending and market capture	Shelburne county households spend about $53,873 each year, close to Yarmouth’s level. However, total household consumption is only $374.1 million, and 85.3% of survey respondents regularly travel outside Shelburne for services and amenities. Shopping for goods was the main travel reason for 55.9% of respondents.	Yellow

Key Takeaway: Shelburne county has solid household spending and gradual growth, but its small trade area, dispersed customers, smaller total spending base and spending leakage reduce sales available to large retailers. Together, these factors help explain the municipality’s limited retail presence.

05

Jurisdictional Scan

Case Study Selection Criteria

We selected case studies from communities with similar characteristics, including governance structure, leadership approach, site characteristics, and development context. However, finding examples that aligned across all criteria was challenging; therefore, some case studies differ in terms of population size while maintaining relevance in other key areas.

	Glooscap Landing, NS	North Caledonia, ON	Agerton Secondary Plan, ON	Caledon, Ontario	Foothills County, AB	Lacombe County, AB
Population	62,914	56,059	158,022	93,100	26,238	11,171
Municipal ownership of lands	✓	✓	✓	Privately held	Privately held	Privately held
Site characteristics - strategic highway adjacent location	✓	✓	✓	✓	✓	✓
Financial feasibility and financial comparability	✓; requires infrastructural funding	✓; requires alternative financing	Coordinated investment is required	Financial feasibility was not evaluated	Financial feasibility was not evaluated	✓; development in some areas requires future infrastructure investment
Comparable scale for development	✓	✓	✓	✓	✓	✓
Canada	✓	✓	✓	✓	✓	✓

Glooscap Landing

Link

Situation

Glooscap Landing is a proposed commercial, tourism, and cultural development located at Exit 8A on Highway 101 in Kings County, Nova Scotia.

Kings County has 62,914 residents, and draws of nearby communities including: Hantsport Wolfville Kentville Windsor Glooscap First Nation

The proposed amenities on the land were: a commercial vehicle service area, a restaurant and retail space, a community gathering space, and a cultural centre showcasing Glooscap First Nation heritage, as well as aesthetic improvements.

How it was evaluated

The study assessed the market, site suitability, community needs, and financial viability of developing the lands.

To evaluate the feasibility, viability of the project, ability to attract investment, the land was evaluated across certain categories.

Partnerships: these included consulting firms, real estate advisors as well as community input.

Market Feasibility: identified market potential based on the site's strategic highway location and surrounding population base.

Financial Feasibility: The financial analysis evaluated multiple funding scenarios, development costs, revenue potential, and investment requirements.

Lessons learnt

1. Strategic location isn't enough. Need to have a clear development plan
2. Market demand should be validated through service gap analysis - this showed there was unmet demand between Windsor and New Minas. This strengthens the case and reduces risk.
3. Infrastructure readiness is often the determining factor – even though market demand existed, it was only deemed feasible with funding for infrastructure.
4. Phased development reduces financial risk
5. Community support strengthens project viability
6. The mixed development plan diversified revenue sources, increased visitation, and created a stronger value proposition for investors and the community.

Windsor, West Hants - Nova Scotia

ASBB conducted an interview with the Director of Planning, West Hants Regional Municipality

Background

Although Windsor's commercial development is now well established, it continues to be recognized as a successful example of municipal-led investment facilitation.

It shows how commercial developments came together from the municipality's perspective, including the role of municipal planning, infrastructure investment, partnerships with private developers, development approvals, and the factors that contributed to the project's success.

Development in Windsor has grown from concept-stage planning on purchased/surplus municipal land into a broader mix of urban and rural commercial activity. Growth was historically shaped around highway-commercial nodes

How it was evaluated

The municipality emphasized that its role was not to directly develop commercial projects, but rather to create the conditions that encourage private-sector investment.

Municipality's role: reviews proposals, and community consultations to establish community vision, priorities and benefits.

Constraints for small municipalities: servicing capacity is a must, having water and sewer infrastructure must be in place before development makes it easier to attract investors. Having the community vision early on, so this doesn't have to be negotiated project-by-project also makes the process of attracting developers easier. Some flexibility in planning and proposals also makes it easier to attract developers, but flexibility should be anchored in planning documents and community priorities.

Strategies for small municipalities: financial incentives are a key tool, this includes cost sharing and phased taxation.

Lessons learnt

1. Developers are more likely to invest when the land is already prepared, i.e serviced.
2. Financial incentives can be a valuable *low-cost* tool to attract developers and to get them to act on underutilized lands.
3. This can include phased taxation on the land, which eases the immediate cost hit for developers. A simultaneous provincial cap ensures the municipality still collects at least 50% of the added revenue over that period. Bridgewater already has a program like this in place
4. Cost sharing is also important tool for attracting developers. Especially for projects at the edge of serviced boundaries. Cost is shared by the municipality and the developer on an upgrade they may need, if it also benefits the community. This can be future profiles for other developments that may take place in the community.

Key Lessons for Investment Readiness

Becoming investment ready entails:

1. The ability to provide key data to business inquiries, by an appointed
2. Having an inventory of available land and buildings including the current zoning and any limitations.
3. Knowing the strengths and weaknesses of the County and being able to communicate those effectively to investors.
4. Creating a unique community economic development identity: This involves developing a strong brand, a value proposition for business investment, and economic development identity, and marketing strategy.
5. Building stronger economic development partnerships: Creating business partnerships, with neighbouring communities, and aligning economic development efforts with regional partners.
6. Showcasing investment opportunities; through community events or website, this builds visibility and in this way the audience can be tracked
7. Recurring reporting can be done in the form of an annual "Employment Lands Readiness Report" which tracks land uptake, servicing capacity assessments, and developer commitments.

Financial Tools for Attracting Investors

Tax Increment Equivalent Grant) (TIEG): it shares a portion of the new property taxes generated by the completed development with the developer for a limited period. If developers demonstrate certain criteria, they can be eligible for this. Criteria can include demonstrating the development will increase the value of the property by a certain amount, provide affordable housing, support cultural activities.

Development Charge Abatement Program: supports the development and redevelopment of properties by offsetting or deferring Development Charges levied by the Town. Development charges include road and transportation costs, stormwater management, fire and emergency fees.

Municipal Fee Programs: intended to offset costs associated with Planning Act applications, building permits, and development charges. Municipal fees include site plan approvals, permit fees, demolition permit fees, zoning by-law amendments. It can be delivered in the form of a rebate, or a grant.

Employment Creation Incentive Program: A development incentive tied specifically to job creation, it requires a certain amount of net jobs to be created by the development for the incentive to be rolled out. It is delivered in the form of a TIEG.

Cost sharing: the municipality shares the cost of developing/building something with the developer, if it will benefit the broader community. This could include servicing, or splitting road paving costs.

Phased Taxation: Due to the fact that a property's taxes will increase because of a development there, Instead of a property's tax bill jumping to its full new amount the moment its assessed value increases (because of new construction or a big improvement), the increase is introduced gradually — in phases — over a set number of years, rather than all at once. This works in a similar way to the TIEG but instead of receiving a rebate, tax is cut at the source.

05

Target Industries

Target Industries Selection Criteria

The table below outlines how the target industries were selected and prioritized. Given the large number of industries considered, sectors were assessed against a set of criteria, with priority given to those demonstrating strong growth potential and alignment with provincial economic priorities.

Criteria	Tourism and Hospitality	Healthcare	Renewable Energy
Community Priorities - What We Heard Report	✓	Residents have to travel outside of Shelburne to access healthcare facilities.	Residents would like to see larger employers, and employment is a concern and barrier for economic development
Shelburne Strategic Plans	Shelburne Town Council Strategic Plan 2024–2028	Local healthcare services are a priority, as well as promoting workforce attraction.	Eastern Shelburne County Energy Strategy
Provincial priorities and policies	Provincial initiatives promote destination development, tourism product diversification, to enhance Nova Scotia's tourism economy.	The province is heavily investing in the recruitment and retention of family physicians, nurse practitioners, and family practice nurses. Aim is to build 5,700 new and replacement long-term care spaces by 2032.	Reinforce renewable energy and clean technology as strategic growth sectors for Nova Scotia. The Province's Clean Power Plan targets 80% clean electricity by 2030
Market Demand	✓	✓	✓
Competitive advantage of Shelburne	Port of Shelburne markets competitive marine terminal rates and cruise visits in an ice-free, deep-water harbour.	Ongoing municipal physician recruitment initiatives	Deep water can support marine infrastructure, coastal location, available land for expansion
Economic Impact	Can create jobs, hotels would facilitate this sector whilst creating jobs	Investment in healthcare can create high-quality, year-round employment, attract skilled professionals, support population growth, increase demand for housing and local services.	Attracts businesses

Other industries we evaluated include: Forestry & Value-Added Wood Products, Ocean Industries (Fisheries & Marine), Renewable Energy & CleanTech, Tourism, Culture and the Creative Economy, Manufacturing and Value-Added Industry, Housing and Community Development, Healthcare

Key Investments/Clusters

Tourism and Hospitality (Hotels/Gas Station/Regional Regional Shopping Experience)

Health Care (Community Health Clinic/Seniors Health Facility/Seniors Home)

Renewable Energy (Mixed Use Housing/Commercial Development)

Tourism and Hospitality Industry Shelburne

According to our market research, as well as the community engagements, tourism is a key industry in Shelburne, and it has the potential to grow even more.

Shelburne has a lot of economic assets which can drive tourism, these include the natural beauty, the beaches, the harbour, lighthouses, and seafood/fishing culture as unique cultural assets.

The recent strategic plan for the Municipality of Shelburne calls for using the existing tourism assets, such as the harbour to attract tourists and generate revenue.

The region is part of Nova Scotia's South Shore tourism area, with provincial initiatives like the Lighthouse Route.

The region generally sees over 180,000 direct overnight stops per year, not counting same-day visits.

The parcel of land can be used to complement the tourism industry and facilitate its growth.

Using the case studies as a guide, specifically the Caledon, Ontario case study, a hotel would complement the tourism industry and help encourage its growth by giving tourists a place to stay in Shelburne overnight.

This will help increase spending related to tourism as longer stays generate more revenue.

As it is by the highway, it will also draw in travellers travelling across Nova Scotia, and therefore won't be dependent on those staying in Shelburne, or coming to Shelburne specifically for tourism. This reduces overall financial risk and makes it easier to draw in investors.

There is also a convenience store and a gas station located on this parcel of land, in the case study. This would complement the hotel even more. During the off-seasons of tourism, the gas station and convenience store would still generate revenue.

Healthcare

The population of Shelburne is an aging one (a breakdown of population demographics can be found in the appendix). Seniors make up the largest proportion of the population, and Shelburne needs to take this into consideration when planning.

The community engagements also revealed that residents travel outside of Shelburne to access healthcare. The nearest hospital is in Yarmouth.

There are also limited options for seniors, and the need for these will only increase as the population is an aging one.

A province-wide plan aims to build 5,700 new and replacement long-term care spaces by 2032, significantly relieving pressure on rural hospitals

Development of the healthcare sector should build upon Shelburne's existing healthcare assets while responding to increasing demand for rural healthcare services. Development should focus on strengthen existing healthcare infrastructure, improve access to care, and attracting healthcare professionals to the region.

Clustered development would help meet this goal. It would integrate primary care, specialist services, diagnostics, rehabilitation, seniors' care, and supporting businesses. This clustered approach improves service coordination, attracts healthcare professionals, supports private investment, and strengthens Shelburne's role as a regional healthcare centre.

This includes:

- A community health clinic so residents don't have to travel outside of Shelburne for basic check-ups, it would be a first response/stop for health issues. This would also take the burden off of hospitals for primary healthcare related check-ups.
- Long-term care spaces need to be addressed. These are dedicated spots in residential facilities that provide 24/7 supervised care, medical monitoring, and assistance with daily living for individuals who can no longer safely live independently. This would also majorly reduce the burden of hospitals
- A seniors health facility/seniors home to address the aging population.
- Pharmacies; a complementary service that supports the overall healthcare ecosystem.
- Healthcare workforce housing to retain physicians and healthcare workers that are coming into Shelburne

This concept is common in economic development because clusters generate economies of scale, encourage collaboration, and attract related investment rather than isolated projects, and overall reduce risk for investors.

Renewable Energy

The community engagements revealed residents look for job opportunities in Shelburne, and this is a key barrier.

They would also specifically like to see more employment opportunities from large employers, which this industry can bring in.

→ If these conditions are not addressed, this can lead to out migration from Shelburne, and this is already occurring across Nova Scotia.

Nova Scotia is executing a massive grid transition to eliminate coal by 2030 and reach 80% renewable energy. Current rates (since May 1, 2026) are $20.08/month for base charges and 19.128 cents/kWh.

The province is building vast onshore wind farms and seeking 600 MW of fast-acting natural gas capacity for backup. [1, 2, 3, 4, 5, 6]

Fisheries & Aquaculture Fund: Efficiency Nova Scotia is administering millions in funding for local seafood and aquaculture businesses to transition to solar or hybrid power systems. [1]

The municipal plan specifically notes that it would like to move away from more heavy industrial activity in Shelburne and promote growth and development in a way that benefits the community.

Clean energy equipment assembly could be a valuable option, rather than heavy manufacturing:

- electrical control panels
- switchgear assembly
- battery enclosure assembly
- renewable energy components
- prefabricated modular energy systems

These require less labour than full-scale manufacturing but create skilled jobs.

Developing the area into an industrial park, as done with North Caledonia, with marine related renewable energy developments, or battery and critical minerals recycling would be a valuable long term opportunity, as it isn't revolved around one employer.

This also means mixed-use and affordable housing to facilitate the increased businesses, and incentivize them.

06
Implementation Roadmap

Implementation Roadmap

This roadmap sets out a structured, ten-year pathway to move the 103 Property from its current state of market readiness to becoming an established, investment-ready location for employment, commercial, tourism, and mixed-use development. It translates a broad economic-development ambition into sequenced, accountable workstreams, each with a clear rationale, a designated lead, a comparable jurisdiction to draw lessons from, and a defined deliverable. Delivery is organized into 4 phases.

Phase 1

Plan and Prepare

Purpose: Establish the strategic, planning, & technical foundation required to reduce development risk and position this land as an investment-ready opportunity.

Investors are more likely to commit to a site with:

- a clear vision,
- planning certainty,
- an understanding of development constraints.

Phase 2

Enable Investment

Purpose: Identify and address infrastructure, funding, and partnership requirements to improve site readiness and competitiveness for future investment.

- Infrastructure is a key determinant of development feasibility.
- Servicing the site, securing funding, and strengthening partnerships make the 103 property more competitive.
- They improve its attractiveness to private investors.

Phase 3

Attract Investment

Purpose: Develop an investment attraction approach that positions the 103 property as a competitive site for target industries through targeted marketing, investor engagement, and strategic partnerships.

Investment does not occur passively. Successful municipalities:

- actively market their sites,
- engage directly with investors,
- build strategic partnerships.

Phase 4

Growth and Monitor

Purpose: Establish a phased implementation and monitoring approach to ensure long-term success, measure outcomes, and support evidence-based decision-making.

Long-term success depends on:

- Phased development,
- continuous monitoring, and
- adapting to changing market conditions.

Measuring performance ensures public investments deliver economic outcomes and that future decisions remain evidence-based.

Timeline

Workstream	Y1	Y2	Y3	Y4	Y5	Y6–10	Lead
VISION, PLANNING & STRATEGY							
Establish Development Vision & Governance	■	■					Council / CAO
Land Use Framework & Secondary Planning	■	■					Planning
Market Analysis & Target Sector Strategy	■	■	■				Economic Development
SITE READINESS & ENVIRONMENT							
Engineering & Geotechnical Studies	■	■	■				Engineering
Environmental Assessments & Permitting	■	■	■				Municipality / Province
INFRASTRUCTURE & SERVICING							
Infrastructure Master Plan	■	■	■				Municipality
Infrastructure Funding Applications	■	■	■	■			Municipality
Roads, Water & Wastewater Upgrades		■	■	■	■		Municipality
Broadband & Electrical Capacity		■	■	■	■		Municipality / Utilities
Housing Partnerships		■	■	■	■	■	Municipality / Housing NS
INVESTMENT ATTRACTION & MARKETING							
Investment Prospectus & Branding	■	■					Economic Development
Investment Website & GIS Portal	■	■					Municipality
Investment Missions & Conferences		■	■	■	■	■	Economic Development
Anchor Tenant Recruitment		■	■	■	■		Municipality / Invest Nova Scotia
DEVELOPMENT & GROWTH							
Employment Land Development			■	■	■	■	Developers
Commercial Gateway Development				■	■	■	Developers
Tourism & Hospitality Development				■	■	■	Municipality / Private Sector
Mixed-Use & Waterfront Development					■	■	Municipality / Developers
PERFORMANCE & GOVERNANCE							
Annual KPI Monitoring & Reporting	■	■	■	■	■	■	Council
Five-Year Strategy Review					■		Council

07 Appendix

SWOT (Community Survey)

A SWOT analysis is a strategic tool used to assess internal strengths and weaknesses, as well as external opportunities and threats, to support program planning and service improvement.

Strengths

- Shelburne's natural environment, slower pace of life, safety, and community character is important.
- There are strong connections to the area and local knowledge of community needs.
- Residents want to prioritize maintaining the small-town character and environmental assets.

Weaknesses

- Residents identified gaps in grocery options, retail, restaurants, healthcare access, recreation, and other services, with many travelling outside the area to meet their needs.
- Residents identified limited jobs as a concern and a barrier to economic growth.
- Limited transportation options create barriers for residents without access to private transportation.
- Housing constraints were also identified.

Opportunities

- Opportunities for additional grocery stores, retail, restaurants, healthcare-related services, trades, childcare, and recreation options.
- Concerns around limited jobs can be supported by aiding businesses and sectors residents identify with growth potential.
- Quality of life can be improved through community-focused amenities

Threats

- Limited employment, housing, and service options affects the community's ability to retain younger residents and attract new households.
- Dependence on outside communities and spending leakage is a major threat.
- Limited confidence in future economic conditions by residents can lead to skewed investor perception

SWOT (Municipal Staff and Council Survey)

A SWOT analysis for YLS is a strategic tool used to assess internal strengths and weaknesses, as well as external opportunities and threats, to support program planning and service improvement.

Strengths

- The strategic location and highway access provide visibility for commercial development and future growth opportunities.
- Municipal ownership means flexibility with planning and makes it easier for investors as well.
- There are many existing economic assets and community anchors such as natural beauty, waterfront assets, fishing/marine-related industries, and Roseway Hospital as existing anchors that attract activity to the community.

Weaknesses

- Limited servicing capacity and infrastructure uncertainty – Access to water/sewer services, power, and other infrastructure
- Respondents identified wanting to see upgraded infrastructure, serviced land inventory, improved site marketing, and faster approvals as areas requiring improvement.
- There is limited clarity on preferred development direction, as well as workforce and housing constraints

Opportunities

- Development of employment-generating uses such as light industrial, commercial services, tourism-related businesses, and other job-creating activities.
- Improving municipal investment readiness by preparing the lands through servicing analysis, clear approval processes, etc to improve the Municipality's ability to respond to investment opportunities.

Threats

- Without confirming investor demand, infrastructure requirements, and appropriate uses, there is a risk of investing in lands without sufficient uptake.
- Infrastructure costs and financial pressures, such as required upgrades to water, sewer, power, or transportation infrastructure could create significant upfront costs for the Municipality.

How the Retail Trade-Area Estimates Were Calculated

A retail trade area is the area from which a business is likely to draw regular customers. These planning-level estimates divide each market into primary, secondary and tertiary areas based on road access, competing retail centres and expected shopping patterns. The full population of every unique community in the three areas is then added. The same method was used for Shelburne, Yarmouth and Queens.

Step 1: Define the likely shopping area

Trade areas were based on:

- major roads and normal travel patterns;
- nearby competing retail centres;
- geographic and municipal boundaries; and
- how regularly residents are expected to use each retail centre.

Step 2: Set the catchment area for each market:

Market	Catchment used	Reason
Shelburne	**Primary**: 5,980: Town and District of Shelburne; **Secondary**: 476: Town of Lockeport; **Tertiary**: 7,248: District of Barrington and Town of Clark's Harbour	Shelburne serves the Town and District most regularly. Lockeport has a moderate connection, while Barrington and Clark's Harbour are farther away and also use Yarmouth.
Yarmouth	**Primary**: 24,947: Town and District of Yarmouth, District of Argyle and Yarmouth 33; **Secondary**: 14,926: Districts of Clare and Barrington and Town of Clark's Harbour; **Tertiary**: 15,840: Town and District of Digby, Bear River (Part) 6, Town and District of Shelburne and Town of Lockeport	Yarmouth is the strongest regional retail and service centre. Nearby areas use it regularly, while more distant communities also have local or competing shopping options.
Queens	**Primary:** Region of Queens Municipality, Medway River 11, Ponhook Lake 10 and Wildcat 12; **Secondary**: Town of Lockeport, western Lunenburg County and eastern Shelburne County; **Tertiary**: tourism and seasonal populations that increase the number of potential customers during peak periods.	Queens primarily serves residents of the Region of Queens and nearby Indigenous communities. Its wider secondary market extends into western Lunenburg and eastern Shelburne because residents in these areas may travel to Queens for selected stores and services. Tourism and seasonal residents add further demand, but their contribution changes throughout the year and is therefore treated as a tertiary market.

Step 3: Add the population

- Shelburne: 5,980 + 476 + 7,248 = 13,704
- Yarmouth: 24,947 + 14,926 + 15,840 = 55,713
- More than 30,000 people across its primary and secondary geographic markets, with additional seasonal demand from tourists and seasonal residents.

Step 4: Interpret the estimates

The figures show each centre's potential customer reach. Queens' estimate also includes a wider regional catchment and seasonal demand, so it should be read as a planning-level market estimate rather than a fixed year-round population.

Foothills County - Alberta

Link

Situation

The proposed development is for a Highway side commercial centre located in High River Alberta. The parcel of land is strategically located on the intersection of highway 2 and 23, and it is located just 30 minutes from Calgary. It sees a lot of traffic, as it is designated a 'freeway' trade route under the North American Free Trade Agreement (NAFTA).

The area concept established a vision for a highway commercial centre, which includes a travel centre/truck stop, a gas station, restaurants, a retail outlet mall, a farmers' market and an RV Campground.

How it was evaluated

Partnerships: Development and planning consultants were engaged, as well as engineering consultants.

Market Demand: Tourism demand was a reason for development; the RV ground serves tourists, and the location being 30 minutes away from Calgary, helps capture tourists.

Site Feasibility: Location on two highway intersections and a freeway, which brings in much traffic and travellers. In terms of availability, there is a large, undeveloped land base which allows for careful, thought out development.

Infrastructural feasibility: It evaluated infrastructural availability, how much needed and serving requirements. It requires investment and further planning and service would be a key factor in planning. It also recommends phased development in 5 phases.

Lessons learnt

1. Infrastructure is often the primary constraint to investment. – Servicing and infrastructure requirements represented the largest challenge. Roads, utilities, and site servicing required significant financing before commercial development could occur.
2. Phased development reduces investment risk – This allows infrastructure and commercial uses to expand in response to market demand while reducing upfront capital requirements.
3. Integrated and coordinated planning creates stronger investment opportunities. Integrating the facilities into one commercial node reduces risk.
4. Market demand should be tied to identifiable user groups, such as tourists and travellers. This reduces risk for investors.

Caledon, Ontario

Link

Situation

This project evaluates the proposed development of the property, located at 12476 Highway 50, Town of Caledon, Ontario, for a five storey hotel and associated parking area. There is a pre existing convenience store and gas station on the land.

The plan for the land proposed that land can be developed for a proposed five storey hotel, and existing Retail Fuel Outlet and associated convenience store.

How it was evaluated

Partnerships: BVD Bolton Hospitality Inc – landowner. Deanlee Management Inc – planning consultant. Toronto and Region Conservation Authority (TRCA) reviewed environmental constraints and natural heritage considerations.

Market Demand: The property is also located within Bolton's Highway Commercial and Prestige Industrial area, prone to receiving business travellers, contractors, industrial clients and visitors to nearby businesses. Being located in the rapidly growing GTA area is very beneficial as well.

Environmental Feasibility: The project addressed environmental requirements through supporting studies which evaluated environmental impacts, stormwater management, and natural heritage..

Infrastructural feasibility: Engineering infrastructure is available to serve the proposed development without a major upgrade.

Lessons learnt

1. Maximizing underutilized land can create strong investment opportunities. – The project capitalized on vacant land surrounding an existing gas station and convenience store, allowing additional commercial development without requiring new land acquisition.
2. Existing infrastructure significantly improves investment readiness.
3. Complementary land uses strengthen the business case. The hotel complements the existing fuel station and convenience store by serving overlapping customer groups, including business travellers, contractors, and highway users.
4. Completing technical due diligence reduces development risk – environmental, infrastructural, servicing, stormwater management.

Lacombe County, Alberta

Link

Situation

The Highway 2 Corridor Economic Development Study – Phase 2: Land Use Strategy was undertaken by Lacombe County, Alberta to evaluate the economic development potential of lands located along the Highway 2 corridor.

The primary focus was to encourage industrial businesses, trucking and logistics operations, warehousing and distribution, and manufacturing and industrial services.

How it was evaluated

Partnerships: This was a municipally led project, and the key partners include, Lacombe County, the project leads, the Town of Blackfalds, and external consultants. The lands were also not municipally owned, so the landowners were key partners.

Market Demand: The presence of existing trucking operations, industrial businesses, storage uses, suggested that there was demand for highway-oriented employment uses – only market evaluation done.

Site Feasibility: The project addressed environmental requirements through supporting studies which evaluated environmental impacts, stormwater management, and natural heritage.

Infrastructural feasibility: Some areas had limited servicing capacity, meaning development intensity would depend on future infrastructure investments.

Lessons learnt

1. Identifying the right development type strengthens the investment case.
2. Infrastructure capacity must be addressed before development can scale. Although the locations were strategically strong, some areas had limited servicing capacity. Future development intensity would depend on additional infrastructure investments.
3. Existing businesses can demonstrate market demand. – The existing trucking operations, industrial businesses, and storage uses in the corridor as evidence that there was demand for highway-oriented employment uses. This helps strengthen investor confidence.
4. The study evaluated large, undeveloped parcels, which allows for larger-scale business parks and industrial areas rather than fragmented individual developments.

North Caledonia - Ontario

Link

Situation

The North Caledonia Employment Lands Feasibility and Servicing Study was undertaken by Haldimand County to assess whether approximately 184 hectares of land in North Caledonia could be developed into future employment lands.

The lands are primarily agricultural, with some existing light industrial and agriculture-related employment uses.

The overall vision was to establish a general employment area focused on industrial and job-generating uses.

How it was evaluated

The study examined potential development options through a phased approach, considering market demand, servicing requirements, development costs, and revenue potential.

It established development and **target sectors,** manufacturing and light industrial uses, logistics and distribution, agri-business and agricultural services, construction and trade services.

The **market analysis** identified North Caledonia as a competitive location due to its position within the Greater Golden Horseshoe, fast-growing economic regions.

Financial Feasibility: only feasible with alternative models of financing, different types of ownership of the infrastructure and buildings.

Lessons learnt

1. The study demonstrates that investment-ready sites require a comprehensive assessment of market demand, infrastructure capacity, servicing requirements, financial feasibility
2. Regional competitive advantages should drive investment attraction
3. Market demand should guide target sectors
4. Financial feasibility should inform development strategy
5. Phased development reduces municipal and investor risk
6. Aligning land use planning with provincial policy increases investor confidence

Agerton Secondary Plan - Ontario

Link

Situation

The Agerton Secondary Plan is located along Trafalgar Road, south of Highway 401 and north of Derry Road, in Milton Ontario

The Agerton Secondary Plan was considered feasible as a long-term mixed-use development area under a comprehensive planning and infrastructure framework, as long as it takes place incrementally.

Agerton was evaluated as a complete community consisting of residential, employment, commercial, institutional, and community uses

How it was evaluated

Partnerships: they partnered with consulting firms, provincial agencies and infrastructure stakeholders, landowners and the public participated

Infrastructure feasibility: The project is feasible because infrastructure planning was integrated into the Secondary Plan rather than being addressed after development pressures emerged. That being said, coordinated investment is required.

Economic feasibility: The analysis evaluated whether the lands could support employment creation; business attraction; commercial growth; expansion of Milton's economic base.

Financial feasibility: The large-scale greenfield development requires substantial upfront investment before financial benefits are realized.

Community Feasibility: Public consultation conducted also helped identify priorities related to community design, recreation, transportation and environmental protection

Lessons learnt

1. One of the strongest aspects of the plan is that it clearly communicates what the area will become over the next 25 years rather than simply identifying land uses.
2. Plan Infrastructure Before Development → The plan recognizes that higher-order transit and transportation investments are essential to unlocking employment and population growth.
3. Integration of employment and housing → instead of separating employment and residential growth, the plan intentionally creates a mixed-use community where people can live close to employment centres → they plan for employment and population growth
4. Strong intergovernmental coordination increases investor confidence because it reduces implementation risk.

Key Lessons

Glooscap Landing, Kings County, NS
North Caledonia – Haldimand County, Ontario
Agerton Secondary Plan – Milton Ontario
Foothills County – Alberta
Caledon, Ontario
Lacombe County, Alberta

The key lessons we learned across these case studies are:

1. **Strategic location** alone does not make a project investment-ready
   Successful projects combined market conditions for ultimate viability. Market conditions included market demand, surrounding population or employment growth, access to regional transportation networks, and provincial policies.
2. **Market development** should drive the type of development.
   Instead of starting off with a predetermined land use, evaluate consumer and business demand as well as regional economic trends.
3. For large developments, **phased implementation** often determines success, as it reduces financial risk.
4. **Infrastructure** is the biggest development of success and feasibility.
   It is important to integrate infrastructure planning into development plans rather than addressing it later.Infrastructure investment also heavily determines feasibility of projects.
5. **Investment decisions** should be based on integrated technical, economic, market, environmental, and community analyses, and these factors also increase investor confidence.
6. **Collaboration** is essential, this includes:
   Collaboration with the community to understand their priorities.
   Collaboration with planners, real estate developers, developers, municipalities

Workstream

Workstream	Why It Matters	Lead	Comparable Jurisdiction	Key Deliverable
VISION, PLANNING & STRATEGY				
Establish Development Vision & Governance	Provides a clear long-term direction, builds investor confidence, aligns Council decisions, and ensures continuity across future Councils.	Council / CAO	Glooscap Landing; Milton	**Development Vision & Steering Committee**
Land Use Framework & Secondary Planning	Identifies where employment, commercial, tourism, recreation, and future development should occur while reducing planning uncertainty.	Planning	Milton	**Development Framework**
Market Analysis & Target Sector Strategy	Ensures development responds to market demand rather than speculation and focuses investment attraction on sectors with the greatest potential.	Economic Development	North Caledonia	**Investment Target Sector Strategy**
SITE READINESS & ENVIRONMENT				
Engineering & Geotechnical Studies	Confirms site suitability, identifies servicing constraints, reduces investor risk, and provides accurate infrastructure costs.	Engineering	North Caledonia	**Site Readiness Assessment**
Environmental Assessments & Permitting	Identifies environmental constraints early, reduces project delays, and improves investment certainty.	Municipality / Province	Glooscap Landing	**Environmental Clearance**
INFRASTRUCTURE & SERVICING				
Infrastructure Master Plan	Determines future road, water, wastewater, power, and broadband requirements before development begins.	Municipality	High River	**Infrastructure Master Plan**
Infrastructure Funding Applications	Reduces the municipal financial burden by leveraging provincial and federal funding for enabling infrastructure.	Municipality	Glooscap Landing	**Funding Agreements**
Roads, Water & Wastewater Upgrades	Provides the essential infrastructure required for private-sector investment and future business development.	Municipality	High River	**Serviced Employment Lands**
Broadband & Electrical Capacity	Modern businesses require reliable digital connectivity and sufficient power capacity to operate and expand.	Municipality / Utilities	High River	**Utility Upgrades**

Workstream

Workstream	Why It Matters	Lead	Comparable Jurisdiction	Key Deliverable
Housing Partnerships	Supports workforce attraction and retention by ensuring adequate housing for employees and their families.	Municipality / Housing NS	All Jurisdictions	**Workforce Housing Projects**
INVESTMENT ATTRACTION & MARKETING				
Investment Prospectus & Branding	Creates a professional investment identity that clearly communicates Hartz Point's competitive advantages to investors.	Economic Development	All Jurisdictions	**Investment Prospectus**
Investment Website & GIS Portal	Provides site selectors and investors with easy access to property information, infrastructure data, and development opportunities.	Municipality	All Jurisdictions	**Investment Portal**
Investment Missions & Conferences	Raises Hartz Point's profile nationally, builds relationships with developers, and generates investment leads.	Economic Development	All Jurisdictions	**Annual Investment Campaign**
Anchor Tenant Recruitment	Securing a major employer builds confidence, attracts complementary businesses, and accelerates development.	Municipality / Invest Nova Scotia	All Jurisdictions	**Anchor Tenant Secured**
DEVELOPMENT & GROWTH				
Employment Land Development	Creates shovel-ready industrial and commercial sites that generate employment and expand the tax base.	Developers	Milton	**Phase 1 Employment Lands**
Commercial Gateway Development	Supports employees, visitors, and residents through restaurants, retail, and local services while reducing consumer spending leakage.	Developers	Glooscap Landing	**Commercial District**
Tourism & Hospitality Development	Expands visitor spending, supports local businesses, and complements waterfront development.	Municipality / Private Sector	Caledon Hotel Study	**Hotel & Tourism Node**
Mixed-Use & Waterfront Development	Creates a vibrant waterfront that enhances quality of life, attracts residents, and supports tourism and investment.	Municipality / Developers	Milton	**Waterfront District**
PERFORMANCE & GOVERNANCE				
Annual KPI Monitoring & Reporting	Tracks progress, measures economic outcomes, and allows the Municipality to adjust the strategy as market conditions change.	Council	All Jurisdictions	**Annual Performance Report**
Five-Year Strategy Review	Ensures the strategy remains aligned with changing market conditions, infrastructure needs, and community priorities.	Council	Milton	**Updated Strategy**

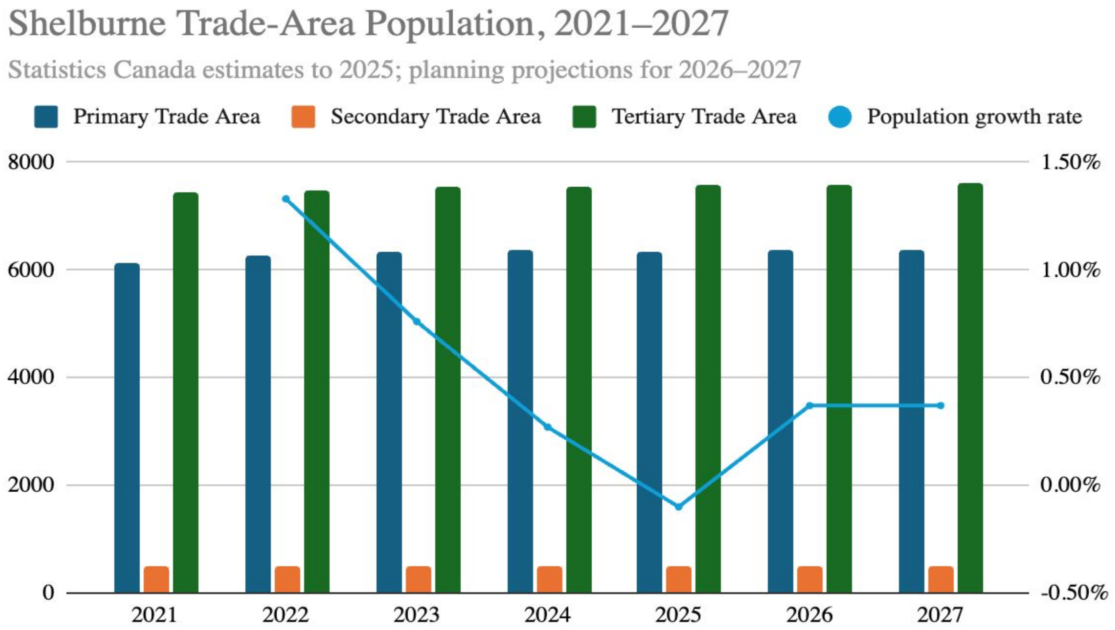
Top Five Areas of Household Spending

Households in Shelburne county, Yarmouth and Queens county spend the most on the same five areas outlined below. Together, these categories account for about 78% of annual household consumption in each municipality.

Spending Area	Comparison Across Municipalities
Housing/Shelter	• Includes spending on rent, mortgage payments, utilities, property taxes, repairs and renovations. • **Shelburne County**: $115.3M, or $16,608 per household; **Yarmouth**: $207.7M, or $17,263 per household; **Queens County**: $75.4M, or $13,872 per household.
Transportation	• Includes expenditure on vehicle purchases, fuel, repairs, insurance and public transportation. • **Shelburne County**: $62.7M, or $9,027 per household; **Yarmouth**: $108.7M, or $9,032 per household; **Queens County**: $38.7M, or $7,132 per household.
Food	• Includes expenses on groceries, specialty food stores, convenience stores and restaurants. • **Shelburne County**: $61.4M, or $8,842 per household; **Yarmouth**: $109.8M or $9,128 per household,; **Queens County**: $40.5M, or $7,463 per household.
Household Operations	• Includes expenses on internet and telephone services, childcare, pet expenses, cleaning supplies and garden services. • **Shelburne County**: $32.5M, or $4,685 per household; **Yarmouth**: $58.9M, or $4,893 per household; **Queens County**: $21.7M, or $3,986 per household.
Recreation	• Includes expenses on recreation equipment, entertainment, facility fees, travel packages and related services. • **Shelburne County**: $21.0M, or $3,018 per household; **Yarmouth**: $34.9M, or $2,903 per household; **Queens County**: $13.2M, or $2,433 per household.

Shelburne Trade-Area Population Trend, 2021-2027

Shelburne's combined primary, secondary and tertiary trade-area population has remained stable and grown gradually. The chart uses Statistics Canada annual population estimates for 2021–2025 and planning projections for 2026-2027.



- The trade-area population grew from 14,064 in 2021 to 14,399 in 2024 and is projected to reach 14,491 by 2027.
- Most customers are in the primary and tertiary areas.
- Growth remains modest, limiting near-term demand for larger retailers.

Key Takeaway: Shelburne's trade-area population is stable and slowly expanding. This supports existing businesses and smaller retail formats, while stronger population growth or greater local spending capture would be needed to support larger retail development.

Retail Studies

Recommended references:

For an economic development or market readiness report, these are the strongest references to include:

1. International Council of Shopping Centers (ICSC) – Industry guidance on retail site selection, trade areas, and rural retail development.
2. MIT Center for Real Estate. *Site Selection Criteria in Community Shopping Centers.* Widely cited academic work summarizing trade area and population requirements for major retail formats.
3. University of Minnesota Extension. *How to Identify New Business Opportunities.* Practical guidance on rural retail thresholds and trade area analysis.
4. Shonkwiler, J.S. & Harris, T.R. (1996). *Rural Retail Business Thresholds and Interdependencies. Journal of Regional Science.* Foundational academic research on rural retail thresholds.

Opportunity to Build Stronger Retail Demand Over Time

Shelburne County's trade area size currently favours smaller and locally focused businesses. Retail demand can become stronger and more dependable by keeping more spending local, concentrating customer activity, growing the household base and reaching customers from outside the county.

Recommendation	Description
Capture More Local Spending	• Focus on goods and services that residents currently travel elsewhere to purchase, especially shopping goods and everyday services. • Help existing businesses expand product lines, coordinate operating hours and offer online ordering, delivery or pickup. • Track spending leakage regularly and recruit businesses only where clear demand exists.
Concentrate Retail Activity	• Direct new retail toward visible and accessible locations near existing businesses, community services and major travel routes. • Group stores, food services and public amenities together so one trip can meet several customer needs. • Improve signage, parking, storefront visibility and connections between commercial areas.
Grow the Local Customer Base	• Support housing development in serviced areas close to shops, employment and community facilities. • Align retail planning with projected growth in population, households and household income. • Encourage smaller and adaptable commercial spaces that can expand as demand increases.
Reach More Regional and Visitor Customers	• Promote Shelburne as a shopping, dining and service stop for Highway 103 users, visitors and nearby communities. • Connect retail promotions with tourism, events, the waterfront and locally made products. • Use regional marketing, seasonal programming and delivery services to extend the market beyond local residents.

Population Demographics

	Shelburne, NS		Yarmouth, NS		Queens, NS	
Population	Value	Percentage	Value	Percentage	Value	Percentage
Population age 0-14	1,835	12.83%	3,538	13.39%	1,122	10.18%
Population age 15-24	1,339	9.36%	2,712	10.26%	1,009	9.16%
Population age 25-34	1,604	11.21%	3,009	11.38%	942	8.55%
Population age 35-44	1,485	10.38%	2,963	11.21%	1,058	9.60%
Population age 45-54	1,673	11.70%	3,105	11.75%	1,309	11.88%
Population age 55-64	2,280	15.94%	4,001	15.14%	1,914	17.37%
Population age 65+	4,086	28.57%	7,103	26.87%	3,663	33.25%

The population in Shelburne is an aging one. Seniors (65 years or older) makeup the largest proportion of the population of Shelburne, as well as Yarmouth and Queens

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