

ASBB Economics & Research

Prepared for the Municipality of the District of Shelburne

103 Property Market Readiness Assessment

Findings, recommended anchors, and
implementation roadmap

Council presentation · October 2026



The question

What can realistically succeed on the 103 Property?

Which uses can the market support?

Evidence-based, not wish-list

What should anchor it, and where?

Highway frontage and Woodlawn Drive lands

What does the Municipality do first?

A phased, ten-year roadmap

The site

~284 acres

Two undeveloped municipal parcels
beside Highway 103, between Exits 25
and 26

Reached today from Pells Road and
Woodlawn Drive

Within a Special Planning Area: any
use can be considered through a
development agreement

How we did it

Six lines of evidence, one decision matrix

Market profile

Population, income, labour, and \$374.1M in household spending

Engagement

2 surveys, 8-10 interviews, business and community sessions

Retail gap analysis

Trade areas, store inventory, and spending leakage

Site assessment

Access, servicing, planning designation, surrounding uses

Jurisdictional scan

Glooscap Landing, Bridgewater, Windsor, Moncton, ONroute and more

Decision matrix

Each anchor scored on community fit, site, market need, impact, and strategic fit

What we heard

Residents want a more self-sufficient Shelburne

85.3%

regularly leave Shelburne for services and amenities

56%

travel outside Shelburne to shop for goods

55.9%

rate local access to healthcare as poor

28%

name limited jobs as a key barrier to growth



Engagement

Who we heard from, and what else they told us

How we engaged

2 surveys: residents and businesses;
municipal staff and Council

8-10 interviews, including Southwest
Employment Services and the
Chamber of Commerce

Business and community
consultation sessions

52.9%

rate local banking and financial
services poor

28%

say retail and amenities are missing

21.5%

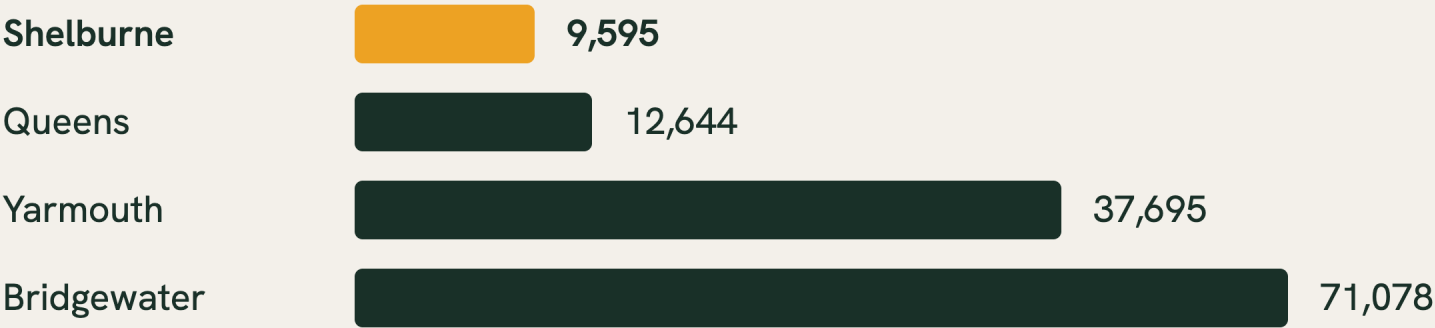
see housing costs as a barrier to growth

16.2%

want more local employment

The market

Shelburne's trade area is small, so smaller stores fit best



People in each trade area (Bridgewater bar not to scale)

Fits Shelburne

Small grocery, value retail, building supply, a bank or credit union, quick-service food

Stays in Yarmouth and Bridgewater

Walmart, Canadian Tire, Superstore, Winners and other large stores

What is a trade area?

The area a shopping location draws most of its regular customers from, set by how far people actually travel to shop, not by municipal boundaries.

Households here spend almost as much as Yarmouth's, but there are far fewer of them.

Retail gap analysis

What is missing, and which node can fill each gap

Type of store or service	In Shelburne today	Nearest	Where it fits
EV fast charging	None	Liverpool, Yarmouth	Highway gateway node (Rec. 05)
Fast food brands	Tim Hortons and Subway only	Barrington Passage	Highway gateway node (Rec. 05)
Local products, taproom outlet	Downtown only	—	Highway gateway node (Rec. 05)
Discount and value stores	No Dollarama or Giant Tiger	Yarmouth	Mixed-use cluster (Rec. 06)
Café, bakery, deli	Few options; residents asked for more	Yarmouth	Mixed-use cluster (Rec. 06)
Banking	52.9% rate services poor	Yarmouth	Mixed-use cluster (Rec. 06)
Professional offices	Residents travel for dentists, lawyers	Yarmouth, Bridgewater	Offices in the mixed-use cluster (Rec. 06)
Grocery, building supply	One Sobeys; Home Hardware	Yarmouth	Test small formats (Rec. 06)
Pharmacy, clinic space	Limited; care is out of town	Yarmouth, Bridgewater	Health and community node (Rec. 07)
Branded hotel	None; 4 motels, 4 inns	Yarmouth, Liverpool	Only if demand proven (Rec. 06)

Big box stores are not recommended: they already serve the region from Yarmouth and Bridgewater

Where demand is strongest

Demand is strongest where residents and travellers overlap

Sector	Evidence
Highway travellers	180,000+ overnight stops a year; \$13.5M gasoline and \$11.0M restaurant spending
Healthcare	28.6% of residents are 65+; 55.9% rate access poor; needs a provincial partner
Retail and services	No Dollarama or Giant Tiger in the county; 52.9% rate financial services poor
Accommodation	4 hotels and motels, 4 inns, no branded hotel; demand at the site not yet proven

Why EV charging is a growing traveller need

No public fast charger between Liverpool and Yarmouth, the longest gap on Highway 103

Ontario added fast charging to all 23 ONroute highway stops, with federal funding

Nova Scotia is targeting 80% clean electricity by 2030

Our first recommendation

Start with a highway stop with EV charging, then build the rest of the site in phases.

Lowest risk

Fills a clear gap on Highway 103 that already has customers

Easiest to deliver

Private fuel and food operators build and run it

Little municipal money

Land, studies and incentives, not construction costs

Unlocks the rest

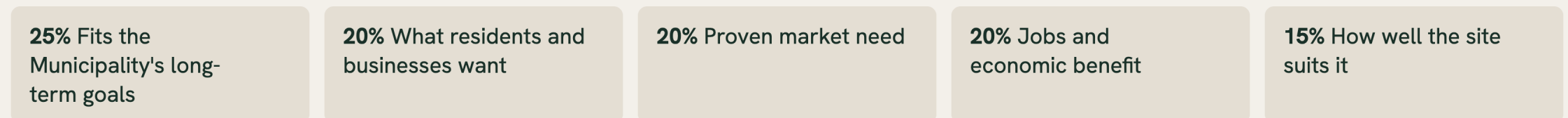
Its traffic makes shops and a hotel more viable

The four anchors

We recommend four anchors, built in order



How the score works: each anchor is rated 1 to 10 on five questions, weighted and added to a score out of 10.



The health centre scores well on need but sits third because Nova Scotia Health controls its timing

Highway Stop / Rest Area with EV Charging

What it is

Fuel and convenience, 1-2 quick-service restaurants, washrooms and visitor information, a DC fast-charging hub, and truck and RV parking on a 20-25 acre first pod

How it is delivered

Ground lease or conditional sale to a fuel operator, approved through a development agreement; First Nation joint venture as an option

Proceeds when

Access approach is settled, traffic supports the format, and a fuel operator and charging partner commit



Example of the format, not the site

Why first

No fast charger between Liverpool and Yarmouth;
serves traffic beyond Shelburne's trade area

Retail and a possible hotel follow the traffic

Highway Commercial / Retail

Small-format value retail, small grocery, building supply, a bank or credit union, and restaurants on an 8-12 acre first phase

No big-box retail and nothing that duplicates downtown

Proceeds when the stop is open and two or more tenants sign letters of intent

Micro-Hotel (conditional)

A limited-service hotel at the lower end of 25-50 rooms on a reserved 2-3 acre pad beside the stop

Feasibility study first; seasonality and the Yarmouth-Bar Harbor ferry are key risks

Proceeds only with year-round occupancy at or above 65% and a committed operator



Regional Health & Specialist Centre

What it is

A public-private centre on 2-4 acres at Woodlawn Drive: Nova Scotia Health outreach, lab collection and diagnostics alongside pharmacy, physio, dental, optometry and audiology tenants

How it is delivered

Build-to-suit by a healthcare developer on a municipal ground lease, approved through a development agreement

Proceeds when

Nova Scotia Health commits services, or private tenants commit enough space to anchor the building, by Year 5

Why it matters

55.9%

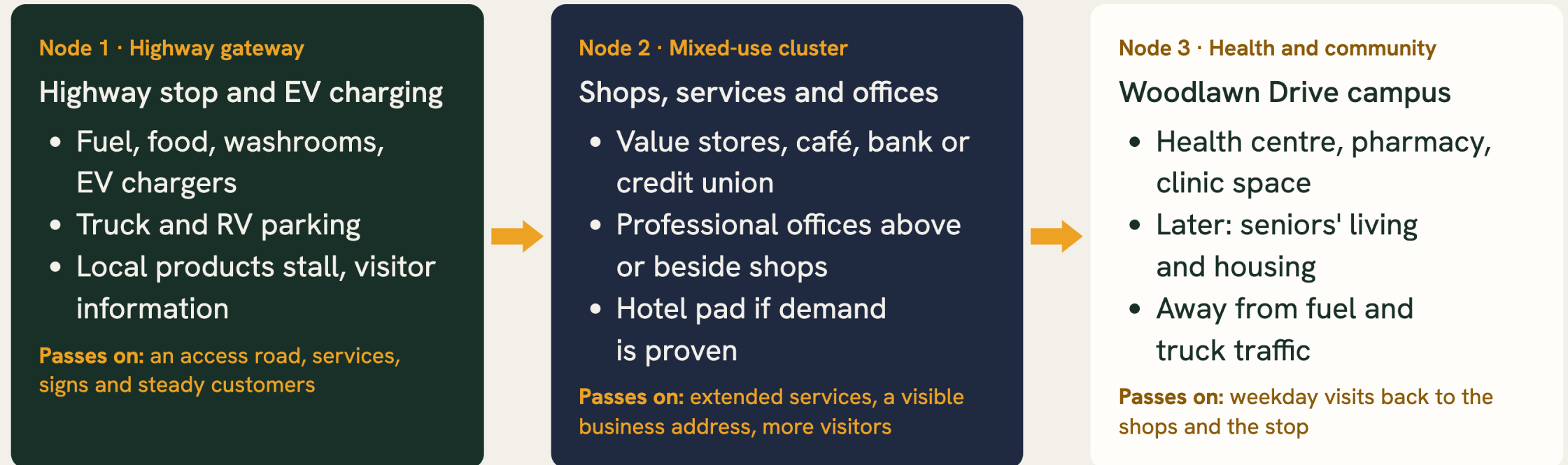
rate local healthcare access as poor

28.6%

of residents are 65 or older

A mixed-use site, built in nodes

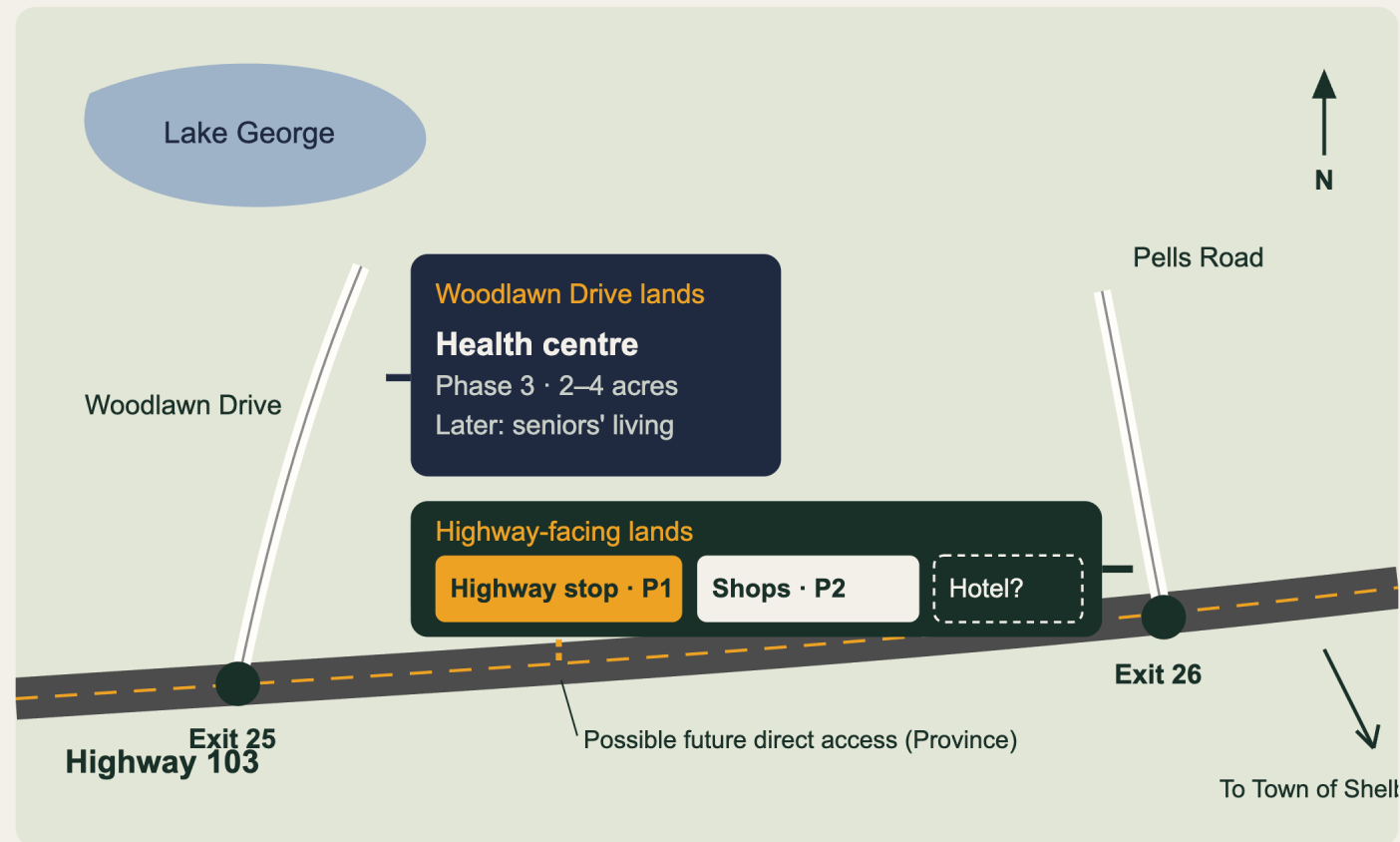
Three mixed-use nodes, each one starting the next



Recommendation: plan the whole property for mixed use, so each node can combine commercial, service, office, health and community uses as demand grows, approved through development agreements under the Special Planning Area.

Concept map

How the nodes sit on the 103 Property



Highway-facing lands

Highway stop first, then shops and a hotel pad, sharing one access and services

Woodlawn Drive lands

Health centre and later destination uses, away from fuel and truck traffic

Access

From Pells Road and Woodlawn Drive now; land kept for a direct highway connection

Approvals and access

The site can move forward under today's planning and access

Planning: Special Planning Area

No rezoning needed

Council can consider any anchor through a development agreement, setting uses, layout, servicing, access, phasing and timelines

Recommended: a mixed-use approach, so each node can combine shops, services, offices, health and community uses

Access: a risk to manage, not a barrier

Pursue direct access; plan for local roads

Direct access from Highway 103 would strengthen the stop, so lobby the Province for it and for advance signage

If not approved, develop from Pells Road or Woodlawn Drive and size the stop to that access

In practice

What each recommendation will look like

01 A site plan

Council adopts a map showing where each use goes and land kept for future ramps

02 Talks with the Province

Meetings, traffic counts and a letter asking for an access point and highway signs

03 Site studies

Engineers test soil, water, sewer, power and flooding so businesses know the costs

04 Clear rules and a package

A guide to how Council reviews proposals, a site profile online, one staff contact

05 A highway stop opens

Gas, food, washrooms, EV chargers and truck and RV parking, run by a private operator

06 A mixed-use cluster

Smaller stores, a café, a bank and offices next door, and a hotel only if demand is proven

07 A health centre

Clinic space, specialists and a pharmacy at Woodlawn Drive, once Nova Scotia Health is on board

08 Fair, protected deals

Tax phase-ins for businesses, and the right to take land back if a project stalls

Now, next and later

	Now Year 1	Next Years 2-5	Later Years 6-10
01 Agree on a mixed-use site plan	• Adopt the four anchors and mixed-use approach • Map the three nodes • Keep land for future ramps	• Refine the plan as Node 1 opens • Coordinate with the Town on Exit 26	• Review before Node 3 • Release ramp land once access is settled
02 Highway access, with local roads as the base	• Meet Nova Scotia Public Works • Traffic counts, Exits 24 to 27 • Design for Pells Road and Woodlawn Drive	• Council resolution; meet the Minister • Seek a capital-plan place • Advance signs before opening	• Build direct access if approved • Otherwise keep the request active

Now, next and later

	Now Year 1	Next Years 2-5	Later Years 6-10
03 Study the land	• Soil and ground conditions • Water, sewer, power for chargers • Flood, wetland and wildfire checks	• Choose a servicing option • Agree cost-sharing with developers	• Extend services to Woodlawn Drive for Node 3
04 Set the rules and the welcome package	• Mixed-use development agreement framework • Council confirms welcome uses • One staff contact	• Investment package with all studies • Approvals timeline; Invest Nova Scotia listing	• Refresh the package for each node

Now, next and later

	Now Year 1	Next Years 2-5	Later Years 6-10
05 Node 1: the highway gateway	• Check existing highway services • Concept plan, three funding scenarios • Talk to operators; apply for EV funding	• Sign the operator (Year 2) • Open the stop (Year 3) • Record traffic and sales	• Add chargers and truck parking as demand grows
06 Node 2: the mixed-use cluster	• Keep pads and a hotel pad in the plan • Measure what residents leave town to buy • Build a target tenant list	• Go decision once Node 1 is open (Year 3) • Two or more tenant letters • Hotel decision (Year 4); stores open (Year 5)	• Offices above or beside shops • More pads as demand grows

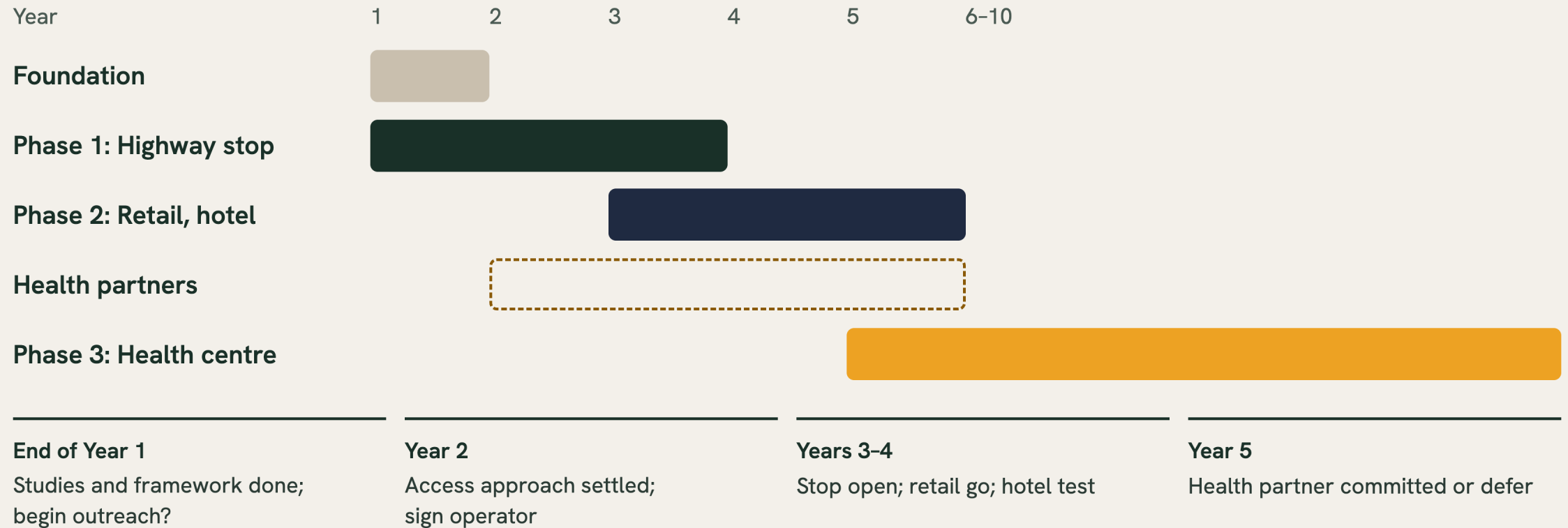
Recommendations 07 and 08 in detail

Now, next and later

	Now Year 1	Next Years 2-5	Later Years 6-10
07 Node 3: health and community	• Keep 2-4 acres at Woodlawn Drive • Start Nova Scotia Health talks (Year 2)	• Tenant letters: pharmacy, physio, dental • Partner decision (Year 5)	• Build-to-suit centre opens (Years 8-10) • Seniors' living and housing later
08 Incentives and protection	• Choose incentives such as phased taxes • Draft a land policy with buy-back rights	• Search for operators node by node • Tie each sale or lease to milestones	• Monitor agreements • Report to Council every year

Roadmap

A ten-year roadmap with a decision point before each phase



Indicative timing; Phase 1 depends on the access approach

How the phases connect

Each phase builds what the next one needs



If a trigger is not met, the next phase waits and its land stays reserved; nothing is built ahead of demand.

Risks

The main risks, and how the plan manages them

Risk	How it is managed
No direct highway access	Lobby early; design for Pells Road and Woodlawn Drive; strong signage
Traffic lower than needed	Get traffic counts first; size Phase 1 to the data
Servicing and power costs	Test on-site options; cost-sharing; EV funding
Seasonal demand, small market	Favour operators with year-round local demand; keep hotel conditional
Pull from downtown businesses	No duplicate retail; steer apparel, gifts, dining to Water Street
Loss of control after land sale	Development agreements; disposition policy with reacquisition clause

For Council's consideration

Five decisions to start Year 1

- 1 Receive the Market Readiness Assessment
- 2 Endorse the four-anchor hierarchy and phasing as the direction for the 103 Property
- 3 Direct staff to prepare a development agreement framework under the Special Planning Area
- 4 Authorize engagement with Nova Scotia Public Works on direct access and signage
- 5 Consider Year 1 study funding of [\$___] through the budget process



Questions and discussion

Full report and summary report available

ASBB Economics & Research

Agamani (Mani) Chakrabarty

mani@asbbconsulting.ca