

ASBB
Economics & Research

Prepared for the Municipality of the District of Shelburne

Market and Investment Readiness Analysis

Market Readiness Assessment — Full Report: market gaps, opportunity assessment, and implementation roadmap for the 103 Property

Full Report | October 2026 | Final report

Humanizing Economics

ASBB Economics & Research Ltd.

Abbreviations

Abbreviation	Meaning
AAN	Assessment Account Number
BIA	Business Improvement Association
CANAMEX	Canada–Mexico (trade corridor)
CMHC	Canada Mortgage and Housing Corporation
COMFIT	Community Feed-in Tariff
EGCCRA	Environmental Goals and Climate Change Reduction Act
GTA / GTHA	Greater Toronto Area / Greater Toronto and Hamilton Area
HAF2	Housing Accelerator Fund (round two)
HRM	Halifax Regional Municipality
ICSP	Integrated Community Sustainability Plan
LUB	Land Use By-law
MODS	Municipality of the District of Shelburne
MPS	Municipal Planning Strategy
NAICS	North American Industry Classification System
NS	Nova Scotia
PACE	Property Assessed Clean Energy (financing)
PID	Property Identification (number)
PMTSA	Protected Major Transit Station Area
PTA / STA	Primary Trade Area / Secondary Trade Area. A trade area is the geographic area from which a business or shopping location draws most of its regular customers (see Section 5.2).
SPA	Special Planning Area: a designation in the 2025 Municipal Planning Strategy that allows Council to consider any type of development on the lands through a development agreement
TIEG	Tax Increment Equivalent Grant
WWHR	What We Heard Report
RES / RD / RR / RC / MI / GI / SC	Residential, Rural Development, Rural Resource, Rural Commercial, Marine Industrial, General Industrial, Suburban Commercial (the seven Land Use By-law zones)

Acknowledgements

ASBB Economics and Research Ltd. would like to sincerely thank the residents of the Municipality of the District of Shelburne who generously shared their time, experiences, and perspectives throughout the development of this Market and Investment Readiness Analysis. Their local knowledge and insights were essential to ensuring that this work reflects the realities, priorities, and aspirations of the community.

We also extend our appreciation to the business owners, community partners, municipal staff, and Council members who contributed to the project. We are particularly grateful to everyone who participated in the community and business surveys and one-on-one interviews. These conversations provided valuable insight into local labour-market conditions, business needs, service and market gaps, barriers to investment, and opportunities for future economic growth.

ASBB Economics and Research Ltd. would also like to acknowledge the leadership and support of the Municipality of the District of Shelburne's staff and Council throughout the project. Their assistance in providing information, facilitating community engagement, and considering the future of the 103 Property was instrumental in shaping the analysis and recommendations presented in this report.

Ultimately, this report reflects the collective input of the Shelburne community and its partners. It is intended to help the Municipality position its land assets for sustainable investment and long-term economic growth while remaining grounded in the priorities, character, and vision expressed by residents and businesses throughout the engagement process.

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Executive Summary

The Municipality of the District of Shelburne acquired the 103 Property, approximately 284 undeveloped acres beside Highway 103 between Exits 25 and 26, as a strategic economic development opportunity. This report assesses which uses can realistically succeed on the site, in what order, and what the Municipality must do to make it ready for investment.

The recommendation in one paragraph

Develop the 103 Property as a phased highway commercial node led by a **highway travel stop with DC fast charging** (Phase 1), followed by a **small-format retail and commercial cluster** (Phase 2), with a **health/medical centre** as a longer-term opportunity on the Woodlawn Drive lands (Phase 3) and a **micro-hotel** only if demand is proven. Because the site is within a **Special Planning Area**, each anchor can proceed through a development agreement approved by Council, with no rezoning required. **Direct access to Highway 103** would strengthen the highway stop and is worth pursuing with the Province, but it is not a precondition: the property can be developed with access from Pells Road or Woodlawn Drive. The first year should be spent completing technical studies, preparing a development agreement framework, and opening the access conversation with the Province.

9,595
people in Shelburne's contribution-weighted retail trade area

85.3%
of residents regularly leave Shelburne for services and amenities

180,000+
direct overnight stops a year in the region

0
fast-charging sites between Liverpool and Yarmouth

Key findings. Shelburne County is an aging, slow-growing community (14,303 residents; 28.6% aged 65 and over) whose households spend almost as much as Yarmouth's but are far fewer. The retail trade area (the area from which Shelburne's shops draw their regular customers) is too small for large-format stores, which Yarmouth and Bridgewater already provide. Demand is strongest where it combines residents and highway travellers: fuel, food, EV charging, and small-format retail. Healthcare is a pressing community need, but its delivery depends on a provincial partner. Housing is the structural constraint behind workforce and population growth and is being addressed through the Municipality's own mixed-use plan.

What the plan delivers. The 103 Property brings in no tax revenue today. Each node of the plan creates jobs, keeps spending in Shelburne, and adds commercial assessment taxed at the commercial rate of $1.82 per $100: as an illustration, every $1 million of new commercial assessment adds about $18,200 a year in municipal revenue. The plan also aligns with provincial priorities (clean electricity, health care, tourism, and investment attraction), which strengthens the case for provincial partnership on highway access and the health centre. Section 12 sets out the benefits and the approach to working with the Province, and Section 11.5 lists the next steps and recommended studies.

Table 1: Anchor hierarchy and phasing

Priority	Anchor	Phase	Where	Why this order
Tier 1 / Priority 1	Highway Stop / Rest Area with EV Charging	Phase 1	Highway 103-facing lands	The clearest service gap; serves traffic that does not depend on Shelburne's small trade area; deliverable by private operators. Stronger with direct highway access, but can proceed with access from Pells Road or Woodlawn Drive.
Tier 2 / Priority 2	Highway Commercial / Retail Cluster	Phase 2	Highway 103-facing lands	Builds on the traffic the travel stop generates; small-format and value-oriented, without duplicating downtown.

Priority	Anchor	Phase	Where	Why this order
Tier 2 / Priority 3	Regional Health & Specialist Centre	Phase 3	Woodlawn Drive and/or near the municipal offices	A real need, but only proceeds if Nova Scotia Health or the Province commits.
Conditional	Micro-Hotel	Phase 2, if demand is proven	Alongside the travel stop	Tourism potential is real, but site-specific demand is not yet demonstrated, and demand is seasonal.

Table 2: The eight recommendations at a glance

#	Recommendation	Headline actions	When
01	Confirm the anchor hierarchy, phasing, and spatial plan	Adopt the hierarchy as the Municipality's position; prepare a concept spatial plan reserving access land; size the first pod; coordinate with any Town plans at Exit 26.	0–6 months
02	Pursue direct highway access, plan local-road access, and seek advance signage	Meet Public Works early; obtain traffic data; commission a traffic impact study; design the site to work from Pells Road and Woodlawn Drive while preserving room for future direct access; request signage guidance.	0–12 months, then ongoing
03	Commission technical and servicing studies	Geotechnical, servicing capacity (including power for fast charging), flood/wetland/coastal hazard, and wildfire work; compare on-site servicing with municipal extension; test cost-sharing.	0–9 months
04	Prepare a development agreement framework and investor materials	Set out how anchor proposals will be considered under the Special Planning Area and the standard terms Council expects; assemble an investment-readiness dossier; name a single point of contact; list with Invest Nova Scotia.	0–9 months
05	Deliver Phase 1: travel stop and EV charging	Approach fuel, quick-service, and charging operators once the access approach (direct or local-road) and servicing are clear; pursue ZEVIP and other EV funding; explore First Nation joint-venture partners.	6–18 months
06	Build the Phase 2 retail cluster; test the micro-hotel	Define a cluster concept; approach Dollarama and Giant Tiger; reserve a 2- to 3-acre hotel pad; commission a hotel feasibility study before deciding.	Medium term
07	Explore the Phase 3 health/medical centre	Open discussions with Nova Scotia Health and Roseway Hospital; assess Woodlawn Drive land; do not market until a partner commits.	Medium to long term
08	Offer incentives and protect the concept through land disposition	Design phased taxation, cost-sharing, and fee incentives; run a tier-by-tier, local-first operator solicitation; adopt a disposition policy with a reacquisition clause.	Medium to long term

01 Introduction

1.1 Project Background
1.2 Project Scope and Objectives
1.3 Strategic Positioning
1.4 Objectives of the Report
1.5 Project Methodology

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Shelburne's historic waterfront and harbour

1.1 Project Background

The Municipality of the District of Shelburne is undertaking a Market and Investment Readiness Analysis to better understand local and regional market opportunities and determine how its municipally owned land assets can support future economic development.

The analysis is conducted on "the 103 Property", a 282-acre property adjacent to Highway 103, which was acquired by the Municipality alongside a 558-acre waterfront property (the Hartz Point property), both located in Shelburne. The properties were acquired as a strategic economic development opportunity, intended to support long-term growth and attract employment and investment opportunities.



Shelburne Harbour from the air

1.2 Project Scope and Objectives

The project will ultimately provide the Municipality with a clear roadmap for positioning its land assets for investment and supporting broader economic growth. This will be done through:

- Project initiation and background research, including policy and GIS reviews to understand land assets and context.
- Market gap analysis supported by quantitative data and qualitative stakeholder insights, to identify unmet demand.
- Commercial viability and opportunity profiling with site visits, scenario planning, and opportunity scoring.
- Investment readiness and asset planning to identify infrastructure gaps and propose a development roadmap.
- Investment attraction and marketing involving investor targeting, marketing collateral development, and outreach strategies.
- Ongoing engagement and reporting to provide transparent progress updates and final actionable recommendations.



Shelburne's harbour front in autumn

1.3 Strategic Positioning

The Municipality's 2025 Municipal Planning Strategy (MPS) introduced a Special Planning Area (SPA) Overlay for Hartz Point. This designation provides flexibility to accommodate future development proposals through a development agreement process rather than limiting the property to a single predetermined use.

The location of the 103 Property gives it strong strategic positioning. Across Nova Scotia, most economic hubs are located within an hour of each other, except on the stretch between Bridgewater and Yarmouth. Shelburne sits at that one-hour midpoint, and this location allows the Municipality to bridge that gap and attract new investment opportunities.

The parcel's location provides several logistical advantages. It is situated near Highway 103, the primary transportation corridor connecting the South Shore region with Halifax and western Nova Scotia, allowing future development to access regional markets and supply chains. Large-scale land availability, proximity to transportation corridors, and connection to existing industrial infrastructure open the path for many opportunities.

Although the site itself is undeveloped, it is well connected and close to existing industrial infrastructure and economic assets, including the Shelburne Industrial Park, municipal water and wastewater servicing in nearby industrial areas, existing marine terminals and ship repair facilities, fibre-optic internet coverage, and regional electricity infrastructure.



Beaches of the Shelburne coast



Inshore fishing fleet

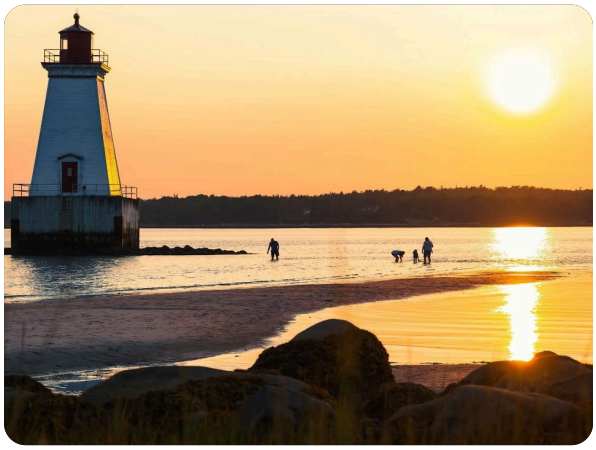
1.4 Objectives of the Report

The objectives of this study are to identify the key market gaps, assess development readiness, identify business retention opportunities, and determine viable future development opportunities.

1. Identify current and emerging market gaps and opportunities by examining demographic trends, economic conditions, consumer spending patterns, tourism demand, workforce needs, housing requirements, and community priorities.
2. Evaluate potential development opportunities and highest-and-best uses for the parcels by assessing the suitability, demand, and strategic alignment of potential commercial, industrial, tourism, recreational, institutional, and mixed-use concepts.
3. Conduct a jurisdictional scan of comparable municipal and community-led development projects to identify best practices, successful development models, partnership structures, funding approaches, and implementation strategies.
4. Evaluate the economic and community benefits associated with potential development scenarios, including employment creation, investment attraction, population growth, tax assessment impacts, tourism benefits, and improvements to community services and amenities.
5. Assess the investment readiness of the properties by evaluating the conditions required to attract private sector investment, including infrastructure needs, municipal supports, servicing requirements, planning approvals, incentives, and potential partnership opportunities.
6. Identify appropriate land development opportunities through the jurisdictional scan, market gaps analysis, and public engagements.
7. Develop a prioritized implementation roadmap that identifies short-, medium-, and long-term actions required for development, including recommended next steps, potential partners, infrastructure priorities, and investment attraction strategies.

1.5 Project Methodology

Our project methodology involved collecting data from multiple sources and perspectives to understand the market, the site, and the community's priorities.



Sandy Point Lighthouse

Table 3: Study methodology

Component	Details
Jurisdictional scan	We reviewed six jurisdictions where similar highway-adjacent developments aimed at economic development were undertaken, and interviewed three other jurisdictions to understand their approaches to attracting investment.
Site and parcel assessments	Evaluation of the physical, regulatory, servicing, access, and development characteristics of the municipal parcels.
Public and stakeholder engagements	Two surveys (community; municipal staff and Council); 8–10 one-on-one interviews; business consultation sessions; community consultation sessions.

Component	Details
Local market profile	Compilation of economic, community, consumer, and tourism market profiles to understand the baseline conditions that shape investment demand and development feasibility.
Market gap analysis	Evaluation of unmet demand and market opportunities relevant to the parcels, through analysis of retail and service gaps as well as housing, employment, industrial, and tourism gaps.
Future growth drivers	Identification of provincial initiatives and growth drivers to identify target industries and their implications for the parcels.
Investment readiness framework	Assessment of how ready the Municipality and parcels are to attract and execute investment, by identifying key risks, developing an investment proposition, and an investment readiness scorecard.

02 Local Market Context: Current State Analysis

2.1 Community Profile
2.2 Economic Profile
2.3 Key Industries and Sectors
2.4 Consumer Profile

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Beaches of the Shelburne coast

The purpose of this section is to develop a community, economic, consumer market, and tourism market profile, evaluating population demographics, the major current industries, and the gaps, needs, and opportunities in the consumer and tourist markets across Shelburne and the nearby regions of Yarmouth and Queens.

2.1 Community Profile

The community profile establishes the demographic and socioeconomic context for the MODS and the broader regional market. It examines population and growth trends, age demographics, labour force and employment characteristics, income, education, and housing conditions to identify the factors shaping current and future community needs. Together, these indicators provide a baseline for understanding population change, workforce availability, housing pressures, and the capacity of the community to support future growth and investment. The analysis considers Shelburne alongside Yarmouth and Queens to provide a broader regional perspective.

Table 4: Population and age trends

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

Manifold market assessment data.

Across the tri-county region, the largest share of the population is the retired population, those aged 65 and older, which is in line with Canada's aging population. This will have an impact on the demand for services and resources. As the senior population increases, more seniors downsize, putting pressure on smaller homes. It will also place pressure on healthcare, as an aging population has increased healthcare needs.

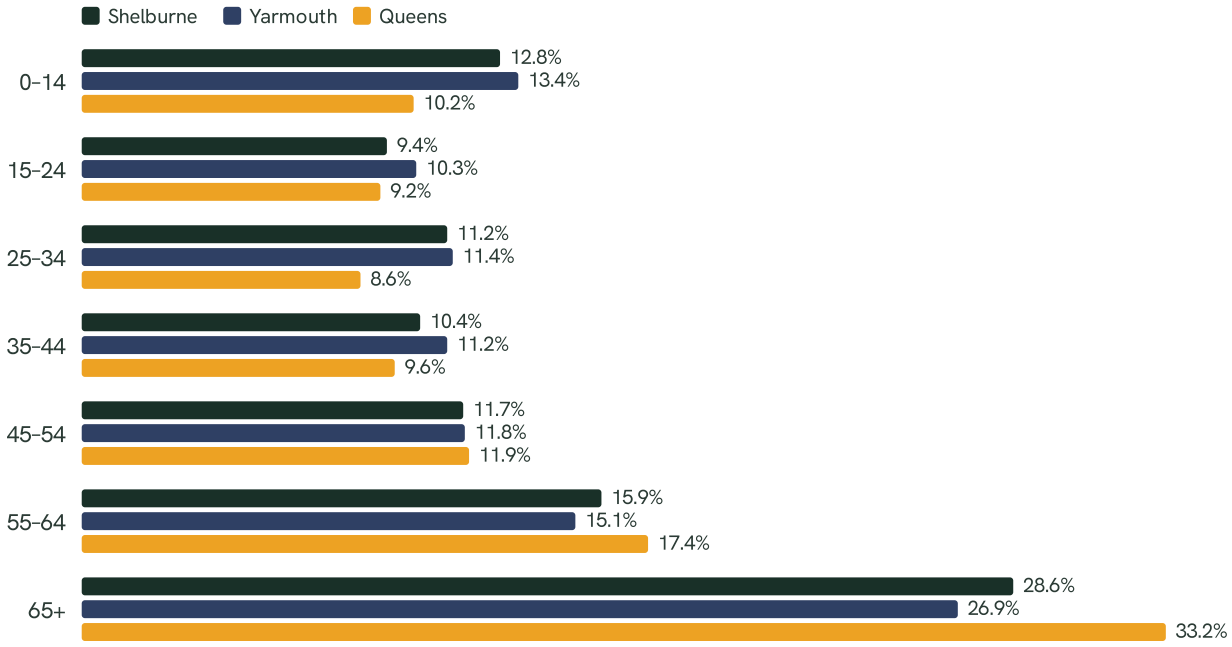


Figure 1: Population by age group, Shelburne County. Data: Manifold market assessment data; see also Nova Scotia Department of Finance, Economics and Statistics Division, Nova Scotia population estimates by county and census subdivision, July 1, 2024.

Shares of the population aged 50–70 were notably higher in Shelburne than in other regions of Nova Scotia, such as Halifax, Cape Breton, and Antigonish counties.

Table 5: Population growth rates

Population growth	Shelburne	Yarmouth	Queens
Current total population	14,303	26,432	11,017
Annual growth, next 3 years	0.30%	0.70%	0.53%
Annual growth, next 5 years	0.39%	0.74%	0.60%
Annual growth, years 5 to 10	0.34%	0.65%	0.52%

Manifold market assessment data.

A top-heavy population pyramid and a low population growth rate indicate low birth rates over a sustained period, so fewer people are entering at the bottom. This signals a shrinking or aging workforce relative to retirees, which strains pension systems, health care, and labour supply. It leads to higher dependency ratios, as fewer working-age people support each retiree. Local demand for retirement-related services (home care, long-term care beds, health care capacity) tends to rise faster than the tax base needed to fund and staff them.

Shelburne cannot rely on births to sustain its population, so attention needs to be placed on attracting migrants and workers by making Shelburne more attractive for businesses and skilled labour.

Table 6: Labour market and employment trends

Labour force status	Shelburne (Municipality)	Shelburne (Town)	Yarmouth (Municipality)	Yarmouth (Town)	Queens (Municipality)
Population aged 15+	11,740	1,395	8,585	5,625	9,205
In the labour force	6,700	755	5,085	2,965	4,180
Employed	5,895	655	4,435	2,505	3,585
Unemployed	800	105	655	460	600
Not in the labour force	5,045	640	3,500	2,655	5,025
Participation rate	57.1%	54.1%	59.2%	52.7%	45.4%
Employment rate	50.2%	47.0%	51.7%	44.5%	38.9%
Unemployment rate	11.9%	13.9%	12.9%	15.5%	14.4%

Manifold market assessment data.

Key definitions

The **labour force** is the total number of people of working age (15 or older) who are either employed or unemployed and actively looking for a job. The **employment rate** is the number of employed persons as a percentage of the population aged 15 and over. The **unemployment rate** is the number of unemployed persons as a percentage of the labour force. The **participation rate** is the labour force as a percentage of the population aged 15 and over.

A significant portion of the population is not participating in the labour force (43.9% in the Municipality). This could include people who have retired or who choose not to participate, but given the high share of the population over the age of 65, it is most likely the retired population.

Table 7: Household income growth

Household income	Shelburne	Growth	Yarmouth	Growth	Queens	Growth
Current average household income	$78,643		$83,543		$76,914	
3-year projection	$81,980	4.2%	$88,852	6.4%	$82,163	6.8%
5-year projection	$86,760	10.3%	$96,286	15.3%	$89,497	16.4%
10-year projection	$93,749	19.2%	$108,496	29.9%	$101,529	32.0%

Manifold market assessment data.

Shelburne's projected income growth over the next ten years is the flattest of the three counties, even compared with Queens, a neighbouring county with a lower starting point and a similar demographic profile. Residents would benefit from this being addressed through attracting new labour and businesses, which would provide more employment opportunities and raise average household income.

Table 8: Education trends (population aged 15+ by highest certificate, diploma, or degree)

Education	Shelburne	Share	Yarmouth	Share	Queens	Share
Total population aged 15+	12,467		22,893		9,895	
No certificate, diploma, or degree	4,003	32.11%	5,975	26.10%	2,454	24.80%
High school diploma or equivalent	3,446	27.64%	5,773	25.22%	2,913	29.44%
Post-secondary certificate, diploma, or degree	5,019	40.26%	11,145	48.68%	4,529	45.77%
Below bachelor level	3,907	31.34%	8,231	35.95%	3,373	34.09%
Apprenticeship / trades	1,171	9.39%	2,222	9.71%	1,076	10.87%
College, CEGEP, or other non-university	2,532	20.31%	5,576	24.36%	2,120	21.43%
University below bachelor level	204	1.64%	433	1.89%	177	1.79%
Bachelor level or above	1,112	8.92%	2,914	12.73%	1,156	11.68%
Bachelor's degree	853	6.84%	2,074	9.06%	861	8.70%

Manifold market assessment data.

Shelburne's lower post-secondary and bachelor's-level attainment, especially compared with Yarmouth and Queens, puts hard data behind the skills shortage businesses reported directly. Shelburne's local labour pool cannot fully supply the credentialed workforce needed for specialized sectors and income growth.



A community festival on the harbour



Market day on the historic waterfront

2.2 Economic Profile

An economic profile identifies the key industries, employment patterns, and sectors driving a local economy, establishing a baseline for understanding its current economic base and capacity for future growth and investment. The table below shows employment counts across industries for the labour force in Shelburne County, categorized by the North American Industry Classification System (NAICS).

Table 9: Employment by industry, Shelburne County (NAICS 2017, 25% sample data)

NAICS sector	Total	Share	Men+	Women+
Total labour force aged 15+	6,695		3,685	3,015
Industry not applicable	90		45	45
All industries	6,610	100%	3,635	2,970
11 Agriculture, forestry, fishing and hunting	1,810	27.4%	1,560	250
21 Mining, quarrying, and oil and gas extraction	25	0.4%	25	0
22 Utilities	25	0.4%	25	0
23 Construction	200	3.0%	170	30
31–33 Manufacturing	1,275	19.3%	835	445
41 Wholesale trade	190	2.9%	130	60
44–45 Retail trade	725	11.0%	265	460
48–49 Transportation and warehousing	150	2.3%	95	50
51 Information and cultural industries	45	0.7%	20	25
52 Finance and insurance	100	1.5%	25	75
53 Real estate and rental and leasing	40	0.6%	0	35
54 Professional, scientific and technical services	155	2.3%	50	100
55 Management of companies and enterprises	0	0.0%	0	0
56 Administrative and support, waste management	100	1.5%	55	40
61 Educational services	260	3.9%	50	205
62 Health care and social assistance	740	11.2%	90	655
71 Arts, entertainment and recreation	55	0.8%	25	25
72 Accommodation and food services	300	4.5%	55	250
81 Other services (except public administration)	190	2.9%	80	110
91 Public administration	220	3.3%	80	145

Statistics Canada, Census of Population, 2021.

The industries that employ the most people in Shelburne County are agriculture, forestry, fishing and hunting (1,810 people), manufacturing (1,275), health care and social assistance (740), and retail trade (725).

2.3 Key Industries and Sectors

Having established Shelburne's current economic base and demographic trends, this section identifies the sectors best positioned to drive future growth. We evaluate provincial and municipal strategies, plans, and priorities to determine which industries are already being targeted for investment across Nova Scotia, and how these align with the opportunities and constraints identified through our community engagements, market research, and jurisdictional scan. This provides the basis for selecting the target industries most relevant to the 103 Property.



Lobster traps and an inshore fishing boat

2.3.1 Fisheries and Ocean Industries

The fisheries and ocean industries sector is a key economic driver in Shelburne. Western Nova Scotia contains more than 1,100 companies connected to the fisheries value chain, including harvesting, processing, marine services, boatbuilding, and niche producers. Shelburne County accounts for almost half of all aquaculture production in the province, producing 5,680,773 kg worth $57,437,181, or 49% of Nova Scotia's total aquaculture production.

New sites for marine and shellfish aquaculture have been identified in the Municipality through the Aquaculture Development Area, alongside major research initiatives and innovations in boat building.

2.3.2 Forestry and Wood Products

Western Nova Scotia is heavily forested, and forestry is identified as a key sector by Western REN, which notes that Nova Scotia's forestry industry is a $2.1 billion sector and that the Western region has significant forest resources that can be harvested sustainably.

Shelburne's economic plans mention interest in wood pellet or biofuel facilities, as well as secondary wood processing that could create jobs using local timber. Western REN emphasizes leveraging the full extent of the forestry value chain, from lumber to advanced products and biomass energy, making forestry a continued target sector for investment in the region.

2.3.3 Renewable Energy

There is a strong strategic focus on renewable energy as a growth area. The Municipality's Integrated Community Sustainability Plan (ICSP) explicitly welcomes renewable energy and sustainable industries. The 2020 ICSP proposes launching a PACE financing program to help residents afford solar and efficiency upgrades (modelled on Halifax's Solar City), advancing an 800 kW municipal wind project in Sandy Point under the COMFIT program pending favourable analysis, and exploring a municipal electric utility as a vehicle to invest in the Kaizer Meadow wind project.

The plan also commits the Municipality to educating residents on renewable energy technology and funding opportunities, while advocating provincially for stronger renewable energy policy and generation targets. These actions build on earlier efforts such as the 2020 Energy

Strategy and reinforce renewable energy's relevance as a target growth sector.



Sandy Point Lighthouse, a federal and provincial heritage building on the Lighthouse Route.

2.3.4 Tourism

The county identifies tourism as a sector to grow by capitalizing on its natural and cultural assets. The waterfront and historic heritage, 18th-century architecture, museums, the Black Loyalist Heritage Centre, and the harbour are seen as underutilized drivers of economic activity.

Shelburne also benefits from provincial tourism strategies such as the Lighthouse Route, which makes tourism a sustainable, growing industry from an investor's point of view. Tourism does not require major infrastructure in the way industrial sectors do, but rather the preservation of culture and nature, alongside complementary infrastructure such as accommodation.

2.3.5 Housing and Community Development

Although not a traditional sector, housing stock and community amenities have become an economic priority in Shelburne. Without sufficient and affordable housing and amenities, it is hard to attract and retain workforce and investment. The Municipality and Town are encouraging housing developments that are sustainable, affordable, accessible, and mixed-use, through the Housing Incentive Program and the Affordable Housing Grant Policy, funded by the Housing Accelerator Fund.

2.3.6 Manufacturing

Attracting light manufacturing and value-added processing is a priority. The Town and District have relatively low commercial tax rates and available land, which are marketed to prospective investors. Western REN's strategy documents encourage growth in sectors that build on local strengths, such as food processing (seafood, agrifood) and niche manufacturing tied to marine (boat building, ship refit) and forestry (wood products). The Municipality is currently prioritizing light industrial development over large-scale heavy industry.



Marine industrial infrastructure on Shelburne Harbour

2.3.7 Critical Minerals

Nova Scotia has a vital role to play in Canada's critical mineral supply chain, through mining, refining, manufacturing, and recycling, as the province (through the Environmental Goals and Climate Change Reduction Act and Nova Scotia's Climate Change Plan for Clean Growth) and the country move toward net-zero greenhouse gas emissions by 2050. With its natural resources, skilled labour, strategic location, and strong business and academic communities, the province is well positioned to engage with this emerging sector.

The critical minerals strategy identifies key minerals in Nova Scotia, updated in 2025 to reflect evolving government priorities and shifts in global market dynamics since 2023. These minerals are prioritized for their potential to attract investment, support domestic supply chains, and position Nova Scotia within growing clean-energy, defence, and technology manufacturing markets.

Table 10: Critical minerals identified for Nova Scotia

Antimony	Cobalt	Copper	Manganese
Rare earth elements	Tellurium	Uranium	Lithium
Gallium	Germanium	Molybdenum	Silver
Zinc	Graphite	Tantalum	Indium
Niobium	High-purity silica	Tungsten	

Nova Scotia Critical Minerals Strategy; Nova Scotia Mineral Occurrence Database.

The strategy shows that Nova Scotia has an opportunity to participate not only upstream (mineral production) but also midstream (processing, refining, and recycling) and downstream (manufacturing and end use).

Table 11: Value chain segments

Segment	Activity
Primary / upstream	Mineral production and extraction
Secondary / midstream	Mineral processing, refining, and recycling
Downstream	Manufacturing and use of metals and minerals

The strategy anticipates analysing economic opportunities from critical minerals along supply chains, in partnership with Invest Nova Scotia (2024–2026), and supporting exploration, research, and education through the Mineral Resources Development Fund (2024–2027). Two points of entry are relevant to Shelburne: secondary processing on highway-accessible land, where Highway 103 provides a transport advantage connecting processing with upstream and downstream activity; and recycling, in line with sustainable development and net-zero goals.



Coastal beach at sunset



Historic waterfront buildings, Shelburne Harbour

2.4 Consumer Profile

A consumer profile characterizes how residents earn, spend, and allocate their household budgets. It provides insight into local purchasing power, spending patterns across major expense categories, and the overall scale of the market available to businesses and investors, establishing the demand base that shapes retail viability and investment potential.

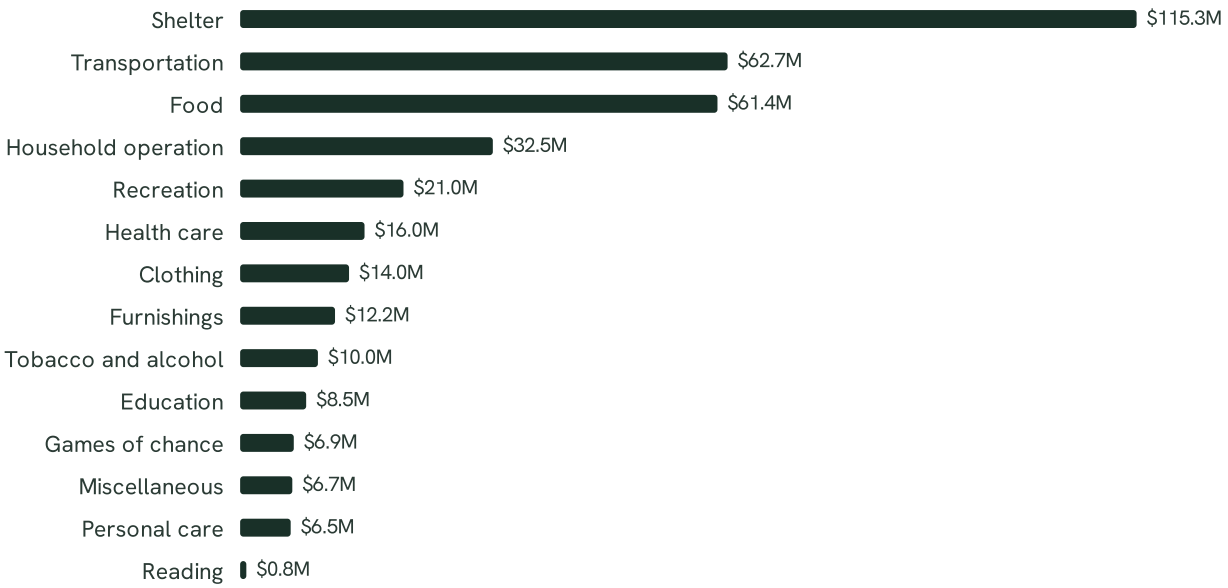


Figure 2: Annual consumer spending by category, Shelburne County. Source: Manifold market assessment data.

Housing and shelter is the highest spending category by far, and it is growing. The tables below show average monthly shelter costs from 2016 to 2021.

Table 12: Average monthly shelter cost, Town of Shelburne, 2016 to 2021

Year	Total	Owner	Renter
2016	$688	$736	$592
2021	$748	$768	$710

Table 13: Average monthly shelter cost, Municipality of the District of Shelburne, 2016 to 2021

Year	Total	Owner	Renter
2016	$674	$668	$705
2021	$693	$679	$764

Manifold market assessment data.

In the Town of Shelburne especially, shelter costs have increased considerably (renter costs rose 20% over five years), and they are expected to continue rising as infrastructure, labour, and capital costs increase. Demand for affordable housing will grow, and if it is not addressed this can lead to out-migration, the loss of skilled labour, and a shrinking tax base.

03 Site and Parcel Assessment

3.1 Location and Identification
3.2 Ownership and Current Condition
3.3 Planning Designation: Special Planning Area
3.4 Access and Transportation
3.5 Infrastructure and Servicing
3.6 Environmental and Flood Considerations
3.7 Surrounding Land Uses and Regional Context
3.8 Strategic Positioning

ASBB



Coastal landscape of the Municipality

This section summarizes the size, location, ownership, current condition, surrounding uses, visibility, access, and strategic context of the 103 Property.

3.1 Location and Identification

The 103 Property consists of two adjacent, undeveloped parcels acquired by the Municipality of the District of Shelburne (MODS) in 2024 from the Wardens and Rectors of the United Parishes of St. George and St. Patrick. It is one of two strategic municipal land acquisitions, alongside the 558-acre Hartz Point property. Both parcels sit adjacent to each other and to Highway 103, between Exits 25 and 26, on the corridor connecting the South Shore region with Halifax and western Nova Scotia. Property 1 is located on Woodlawn Drive in the community of Woodlawn, close to Lake George to the north; Property 2 is located on Pells Road, Shelburne. Both are connected to the Town of Shelburne.



Shelburne Harbour from the air

Table 14: Property location and identification

	Property 1	Property 2
PID	80113889	80143555
AAN	01240749	10435668
Address	Woodlawn Drive, Woodlawn	Pells Road, Shelburne
Assessed value (2025, resource exempt)	$86,800	$31,700

	Property 1	Property 2
County	Shelburne County	Shelburne County
Owner	Municipality of the District of Shelburne	Municipality of the District of Shelburne
Approximate coordinates	~43.79°N, -65.31°W	~43.79°N, -65.27°W

Total land area: approximately 284 acres.

3.2 Ownership and Current Condition



Shelburne's harbour front in autumn

Both parcels are municipally owned by MODS and are currently undeveloped, with no existing structures. Municipal ownership simplifies land assembly and title for prospective developers, and because the land is undeveloped, the site can be planned comprehensively rather than adapting to an existing development.

3.3 Planning Designation: Special Planning Area

The 103 Property is within a **Special Planning Area (SPA)**. Under the Municipality's 2025 Municipal Planning Strategy, the SPA allows Council to consider any type of development on the lands through a **development agreement**, rather than limiting the property to the uses listed for one of the seven standard zones in Part 6 of the Land Use By-law (V.4.1, 2025): Residential (RES), Rural Development (RD), Rural Resource (RR), Rural Commercial (RC), Marine Industrial (MI), General Industrial (GI), and Suburban Commercial (SC).



Shelburne's harbour front in autumn

What the Special Planning Area means for the anchors

No rezoning or zoning confirmation is required. Each recommended anchor (the highway stop with EV charging, the retail cluster, the health centre, and the micro-hotel) can be brought forward as a development agreement for Council to consider. A development agreement sets site-specific terms such as uses, layout, building form, servicing, access, phasing, and timelines, and gives the Municipality a clear tool to secure the anchor concept. Development agreements follow the process set out in the Municipal Planning Strategy and provincial legislation, including public notice and a public hearing, so that step should be built into each anchor's timeline.

The same 2025 Municipal Planning Strategy introduced a Special Planning Area Overlay for Hartz Point, giving that property the same flexibility to accommodate development proposals through a development agreement process rather than a single predetermined use.

3.4 Access and Transportation



Marine industrial infrastructure on Shelburne Harbour

The site's defining locational advantage is its position on Highway 103, the primary corridor connecting the South Shore region with Halifax and western Nova Scotia. Nova Scotia's economic hubs are generally located within an hour of one another, except for the stretch between Bridgewater and Yarmouth; Shelburne sits at that one-hour midpoint, positioning the site to draw both through-traffic and new investment. The Municipality encourages new residential and business development in areas where roads and municipal services are already in place, a criterion the 103 Property meets.

Access: a risk to manage, not a barrier

The parcels are adjacent to Highway 103 but do not currently have direct access to it. They are reached by local roads, Woodlawn Drive for Property 1 and Pells Road for Property 2, and any new direct access to the highway would need the approval of the Province. Direct access would make the highway-facing uses more visible and convenient, and is worth pursuing, but **the property can still be developed with access only from Pells Road or Woodlawn Drive**, supported by strong advance signage from Highway 103. Without direct access, the highway stop would likely capture a smaller share of passing traffic, so its format should be sized to local-road access first.

3.5 Infrastructure and Servicing

The site itself is undeveloped and has no confirmed on-site servicing, but the surrounding area has established infrastructure relevant to future development:

- The Shelburne Industrial Park, expanded by 12 hectares (18 new lots) with road, power, water, and sewer extended to the new lots; its major tenants include an Irving Shipbuilding ship repair facility and Cooke Aquaculture operations.
- The Shelburne Marine Terminal and Shelburne Ship Repair facility, offering 752 m of wharfage, 9.75 m of water depth alongside, drydock capacity for vessels up to 4,000 tonnes displacement, and repair capacity up to Panamax-size vessels.
- Complete high-speed broadband coverage under the Shelburne/Barrington zone of the province's Internet for Nova Scotia Initiative.

- Regional electricity infrastructure and connection to the Town of Shelburne.



Historic waterfront buildings, Shelburne Harbour

3.6 Environmental and Flood Considerations



Shelburne Harbour from the air

Nova Scotia maintains provincial coastal hazard and flood risk mapping tools, and the Municipality directs coastal property owners to these resources when assessing flood and erosion exposure. Property 1 is near Lake George and Property 2 is inland on Pells Road; this profile does not include a site-specific flood, wetland, or coastal hazard determination for either parcel. This would need to be confirmed against the provincial mapping tools before development proceeds.

3.7 Surrounding Land Uses and Regional Context

The surrounding region benefits from a significant fisheries and marine industries sector, a heavily forested hinterland supporting forestry and wood products, and Shelburne's waterfront, 18th-century heritage architecture, and the nearby Black Loyalist Heritage Centre.

The 103 Property lies within the Municipality of the District of Shelburne (the rural municipal unit, distinct from the Town of Shelburne), which recorded a 2021 census population of 4,336 across 1,816.71 km^2 of land, a density of roughly 2.4 people per km^2, reflecting a dispersed, low-density rural setting. This differs from the wider Shelburne County trade area (approximately 14,300 residents), which includes the Town of Shelburne and is the geography used in the market analysis later in this report.



Shelburne Harbour from the air



Historic waterfront buildings, Shelburne Harbour

3.8 Strategic Positioning

The 103 Property was acquired as a strategic economic development opportunity intended to support long-term growth, attract employment and investment, and expand the commercial tax base. It is being evaluated against several potential uses as part of the Municipality's broader effort to determine the highest-value use for the site.

Housing-related funding context is relevant regardless of eventual use: in January 2025, the Municipality received $1.54 million through round two of the federal Housing Accelerator Fund (HAF2), administered by CMHC. The funding supports five initiatives, including a surplus municipal lands program, e-permitting, a housing design catalogue, and financial incentives for builders, tied to a commitment to a net increase of 40 housing units (at least 14 designated affordable) within three years, within a broader municipal Housing Supply Growth Target of 116 new residential units.

04 Public Engagement

4.1 Engagement Methodology
4.2 Limitations
4.3 Key Insights
4.4 One-on-One Interviews
4.5 Areas of Prioritization

ASBB



A community festival on the harbour

Community perspectives were a key component of our analysis. Understanding what residents would like to see is pivotal to understanding what sorts of developments should take place on the land, and this helps to prioritize potential developments. A What We Heard Report, with detailed community responses, is provided separately.

4.1 Engagement Methodology



Shelburne's harbour front in autumn

2	8–10	Business	Community
surveys	**one-on-one interviews**	**consultation sessions**	**consultation sessions**
Community; municipal staff and Council	Employment services, Chamber of Commerce, and others	Local business owners and operators	Residents of the Municipality

4.2 Limitations



Market day on the historic waterfront

The findings presented here are based on feedback collected through surveys and stakeholder engagement activities. Participation was voluntary, and the number of survey responses was relatively low. As a result, the findings may not fully represent the views and priorities of all residents, businesses, and stakeholders within the Municipality of the District of Shelburne.

While efforts were made to engage a broad range of participants, some groups and perspectives may be underrepresented. The findings reflect participant perceptions and experiences at the time of engagement and should be considered as one source of information supporting future planning, economic development initiatives, and decision-making.

4.3 Key Insights

The two surveys assessed the key strengths and gaps identified by residents, municipal staff, and Council members. They are outlined below.

1. Shelburne's biggest strengths are its quality of life and sense of place

Maintaining community identity was identified as an important priority while pursuing economic growth. Community members emphasized that future development should build on what makes Shelburne unique rather than replicate larger urban centres. Residents and businesses consistently identify Shelburne's natural beauty, waterfront, heritage, safety, community trust, and small-town atmosphere as its strongest assets, and see these as the foundation for attracting new residents, visitors, entrepreneurs, and investment.

2. Residents identified significant gaps in everyday services

85.3% of survey respondents regularly travel outside Shelburne to access services and amenities, highlighting local spending leakage and unmet demand.

Source: ASBB internal survey, Community Market & Investment Readiness Survey.

Key service gaps identified include:

Healthcare. Residents identified improved healthcare access as critical for community well-being, attracting families, and supporting an aging population.

How residents rate local access to healthcare



Food and grocery options. Responses suggest demand for stronger grocery, food retail, and local food options.

Retail and shopping. Residents noted opportunities for additional retail services, including clothing, hardware, and general shopping options.

Banking and financial services. Respondents rated local financial services poorly.

How residents rate local banking and financial services



Source: ASBB internal survey, Community Market & Investment Readiness Survey.

3. Workforce shortages are a major barrier to growth

Businesses identified workforce capacity as one of the biggest constraints to future development, including shortages of skilled labour, difficulty attracting and retaining workers, aging demographics, and limited housing options for employees. Growth opportunities exist, but the community needs the workforce capacity to support new investment.

4. Housing was viewed as essential to attracting people and investment

Housing emerged as a major priority for both residents and businesses. Participants identified the need for more housing options, affordable housing, and housing that supports workers, families, and seniors. Businesses specifically identified housing affordability as a barrier to economic growth and workforce recruitment.

5. Community members saw opportunities in several growth sectors

- **Tourism:** waterfront assets, heritage, beaches, and destination development.
- **Marine industries:** building on Shelburne's historical fisheries and marine economy.
- **Healthcare and senior services:** supporting an aging population and expanding local services.
- **Remote work and technology:** leveraging lifestyle advantages to attract remote workers.
- **Housing and residential development:** creating opportunities for population growth and workforce attraction.
- **Diversification:** retail, recreation, arts, renewable energy, and light industry.

6. Businesses want improved investment readiness

Businesses identified that Shelburne's future growth depends on becoming more prepared for investment, including clearer investment opportunities, infrastructure readiness, workforce availability, stronger destination branding, and support for entrepreneurs and new businesses.

7. Residents want growth, but not at the expense of community character

A consistent message was that growth should be intentional. Residents supported development that creates jobs, improves services, attracts younger residents and families, strengthens infrastructure, and maintains Shelburne's identity and natural assets.

We also conducted a SWOT analysis of community themes and business consultation themes. A SWOT analysis is a strategic tool used to assess internal strengths and weaknesses, as well as external opportunities and threats.

Table 15: Community survey SWOT analysis — community themes

Strengths	Weaknesses	Opportunities	Threats
Shelburne's natural environment, slower pace of life, safety, and community character. Strong connections to the area and local knowledge of community needs. Residents want to prioritize maintaining small-town character and environmental assets.	Gaps in grocery options, retail, restaurants, healthcare access, recreation, and other services, with many travelling outside the area. Limited jobs. Limited transportation options for residents without private vehicles. Housing constraints.	Additional grocery stores, retail, restaurants, healthcare-related services, trades, childcare, and recreation. Supporting businesses and sectors with growth potential. Quality of life improved through community-focused amenities.	Limited employment, housing, and service options affect the ability to retain younger residents and attract new households. Dependence on outside communities and spending leakage. Limited confidence in future economic conditions can skew investor perception.

Table 16: Community survey SWOT analysis — business consultation themes

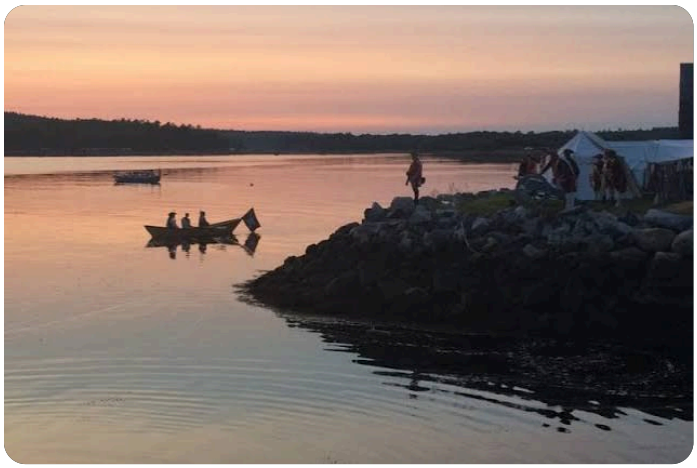
Strengths	Weaknesses	Opportunities	Threats
Quality of life, natural scenery, community trust, and small-town character are core competitive advantages. Waterfront assets, heritage, beaches, safety, and a welcoming community underpin Shelburne's attraction story.	Youth retention, workforce development, destination branding, investment readiness, and protecting community identity. The common thread is balanced growth that creates jobs while preserving place-based character.	Tourism, healthcare and senior services, housing, remote work, recreation, renewable energy, local retail, arts, and light industry, building on Shelburne's lifestyle appeal and underused market potential.	Workforce and skilled labour shortages, housing affordability, childcare access, transportation, and funding. Taxation, limited amenities, aging demographics, and resistance to change.

Source: ASBB internal survey, Community Market & Investment Readiness Survey.

Table 17: Municipal staff and Council survey SWOT analysis

Strengths	Weaknesses	Opportunities	Threats
Strategic location and highway access provide visibility for commercial development. Municipal ownership means planning flexibility and is easier for investors. Existing assets and anchors such as natural beauty, waterfront assets, fishing and marine industries, and Roseway Hospital.	Limited servicing capacity and infrastructure uncertainty (water, sewer, power). Desire for upgraded infrastructure, serviced land inventory, improved site marketing, and faster approvals. Limited clarity on preferred development direction; workforce and housing constraints.	Employment-generating uses such as light industrial, commercial services, and tourism-related businesses. Improving investment readiness through servicing analysis and clear approval processes.	Without confirming investor demand, infrastructure requirements, and appropriate uses, a risk of investing in lands without sufficient uptake. Infrastructure costs and financial pressures could create significant upfront costs.

Source: ASBB internal survey, Municipal Lands & Investment Readiness Survey (municipal staff and Council).



Heritage re-enactment on the harbour at dusk



Beaches of the Shelburne coast

4.4 One-on-One Interviews

4.4.1 Project Manager, Southwest Employment Services (Nova Scotia Works Centre)

This interview gave important insight into labour-market challenges in Southwest Nova Scotia and what needs to be in place to connect workers with emerging employers and industries.

- **Transportation.** People may be willing and able to work but cannot get to where the jobs are. SES sees value in exploring shuttle buses, employer transportation, or other ways of moving workers to employment centres, especially in rural areas where jobs are spread out.
- **Wages.** Even when employment is available, people may not take it if starting wages cannot cover costs such as transportation and childcare. This matters in communities without large employers offering competitive salaries.
- **Childcare costs.** Childcare is a major barrier, particularly for shift work and non-standard hours. Labour-force participation depends on supports such as reduced-cost daycare.
- **Aligning training with employer demand.** SES is working to understand which skills new industries will need and whether local training can supply them. There is often a mismatch between the number of people trained and the number of workers needed, particularly in health care, skilled trades, fisheries, butchery, carpentry, and early childhood education.
- **Geographic challenges.** Where jobs are located and where people live do not always line up, especially in health care, fisheries, and mining, which inflates transportation costs.

4.4.2 Director, Shelburne & Area Chamber of Commerce

This interview discussed the key barriers to attracting and retaining residents, businesses, and investment, including housing, amenities, labour, services, and the overall community experience.

- **Housing is the most significant challenge.** There is strong demand for rental housing but not enough supply. Property taxes increase operating costs and therefore rents, and short-term rentals and underused properties contribute to the shortage of full-time housing.
- **Business concerns.** Businesses are concerned about attracting enough people to live locally, particularly professionals and families. Lacking key services such as dentists, lawyers, and healthcare providers makes the community less attractive to new residents, and worker retention ties back to housing and amenities such as recreation.
- **Recommendations.** Bring vacant and underused properties (including vacant second floors and short-term rentals) into the long-term rental market; consider temporary property-tax relief to improve the feasibility of long-term rental units; leverage Shelburne's rural and coastal identity as an economic advantage; and focus diversification on healthcare, tourism, marine, clean industry, and senior services.

Overall, increasing the supply of housing would enable more people to live in Shelburne, which in turn would help local businesses attract and retain workers. A larger and more stable population could also support professional services and make amenities such as childcare, recreation, retail, and healthcare more viable, creating a positive cycle of population and economic growth.



Shelburne's harbour front in autumn

4.5 Areas of Prioritization

Residents envision a self-sufficient Shelburne, where they do not have to leave the area for recreation, work, or shopping. According to the community survey, 85.3% of respondents regularly travel outside Shelburne for recreation, shopping, or healthcare, and 13.2% would like to see recreation facilities expanded. More healthcare and recreation facilities, with sustainable infrastructure, was raised as a leading concern.

Residents also want more affordable residential units, employment opportunities, social spaces and activities, and commercial spaces such as delis, bakeries, and grocery stores. Housing costs were identified as a barrier to economic growth by 21.5% of respondents; 16.2% want improved local employment, while 28% identified limited jobs as a key barrier to economic growth; and 28% identified retail and amenities as missing, with 56% travelling outside Shelburne to shop for goods. Residents would also like more large employers, specialized healthcare, and an emergency room.

Although limited local employment was the single barrier cited most often (28%), residents consistently linked employment, population, and business growth back to the availability of housing. Housing was therefore identified as the key structural constraint, and growth in other sectors will be challenging if it is not addressed.

Residents also noted feeling burdened by the tax load without seeing its benefits in the community. Having these amenities and facilities would attract more people, help retain them, and encourage youth to return.

05 Market Gap and Demand Analysis

5.1 Community Gaps Analysis: What We Heard
5.2 Retail Market Gap Analysis
5.3 Retail and Service Inventory
5.4 Market Gap 1: Relatively Small Trade Area
5.5 Market Gap 2: Low Customer Concentration
5.6 Market Gap 3: Opportunity to Strengthen Market Growth
5.7 Market Gap 4: Smaller Total Spending Market
5.8 Top Five Areas of Household Spending
5.9 Shelburne's Retail Market Readiness
ASBB



Market day on the historic waterfront

5.1 Community Gaps Analysis: What We Heard

Affordable housing was one of the themes identified by residents in the What We Heard Report. Housing is being addressed separately through the Municipality's own mixed-use plan, so it is treated here as context. The other gaps residents identified, in healthcare, local services, retail, and employment, are set out below.



Shelburne's harbour front in autumn

21.5% identify housing costs as a barrier to economic growth

85.3% regularly travel outside Shelburne for recreation, shopping, and healthcare

28% identify limited jobs as a key barrier to economic growth

56% travel outside Shelburne to shop for goods

- **Housing.** A barrier to accommodating population and employment growth and to retaining migrants and skilled workers.
- **Healthcare, recreation, and social spaces.** Residents want a self-sufficient community where they do not have to leave the area for recreation, work, or shopping; 13.2% would like to see recreation expanded. This affects the long-term attraction and retention of people, businesses, and investors.
- **Employment.** Residents would like more large employers; 16.2% want improved local employment.

- **Retail and food.** Residents want more grocery stores, delis, bakeries, and retail; 28% identified retail and amenities as missing. With more than half of residents leaving Shelburne to shop, there is considerable consumer spending leakage.
- **Specialized healthcare** and an emergency room.

Taken together, residents point to gaps in healthcare access, local shopping and services, and local employment, and to spending that currently leaves the community.

5.2 Retail Market Gap Analysis

What is a trade area?

A **trade area** is the geographic area from which a business or shopping location draws most of its regular customers. It is defined by where customers actually live and how far they will reasonably travel to shop, not by municipal boundaries, so it can include neighbouring communities and exclude places that are closer to a competing centre. Retail studies usually divide it into a **primary** trade area (the closest communities, which shop there most often), a **secondary** trade area (nearby communities with other options), and a **tertiary** trade area (more distant communities that visit occasionally). Retailers use the size of the trade area, and how much its households spend, to decide whether a location can support a store.

A retail market gap analysis examines whether the goods and services available in a community match what residents and other customers are able and willing to buy. It considers the size and location of the customer base, access to potential store locations, expected population and household growth, household spending, and how much spending is captured locally or leaves the community. Together, these measures help determine whether an identified gap represents enough demand to support a new business.

For Shelburne County, the analysis explains why some retail gaps persist and identifies the types of businesses more likely to succeed. Shelburne has meaningful household spending and steady growth, but its relatively small trade area, dispersed customers, smaller total spending market, and spending leakage limit the sales available to large retailers. The findings therefore support smaller, flexible, and locally focused businesses that can serve residents, capture spending that currently leaves the county, and attract highway users, workers, and visitors.

5.2.1 What Retailers Look for Before Entering a Market

The four conditions used in this analysis are supported by comparable retail market studies. Bridgewater's study examined trade-area population, access, and customer concentration before estimating the retail space the market could support. Fort Saskatchewan's study assessed trade-area growth, household income, spending patterns, and spending leakage. North Glengarry's study measured local market capture and tested how retaining more spending could create demand for additional retail space. Together, these studies show that retail potential depends on the number and location of customers, future growth, and spending captured locally, not population alone.

The level of demand required also varies by business type. A specialty shop or small local business can operate with fewer customers and lower sales than a supermarket or large national chain.

Table 18: Conditions for market entry

Condition	What retailers assess	Evidence from comparable retail studies
Trade-area size	Retailers count all people likely to shop at the location, not only those within the municipal boundary. The number of customers required depends on the store format and expected sales.	The Town of Bridgewater has 9,626 residents, but its wider trade area reaches 71,078 people. Its retail study identified demand for about 195,000 sq ft of new retail space, including 30,173 sq ft of grocery space.

Condition	What retailers assess	Evidence from comparable retail studies
Customer concentration and access	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 visits.	Downtown Bridgewater has more than 5,300 residents within a 20-minute walk. The study linked this concentration with opportunities for local shops, dining, and mixed-use development.
Growth outlook	Retailers prefer markets where population, households, and income are expected to increase. New housing adds customers and confidence that sales can grow.	Fort Saskatchewan's retail trade area was expected to grow from 38,700 to 46,000 residents over ten years (about 19%), strengthening support for new shops and services.
Spending and market capture	Total spending within the trade area, how much local businesses capture, and how much is spent elsewhere. An opportunity exists when a realistic increase in local share creates measurable demand for store space.	Alexandria, Ontario captured 52.7% of trade-area spending. Its study estimated that a five-point increase in local market share could support 152,613 sq ft of new retail by 2031, including 22,025 sq ft for grocery and specialty food.

These examples show how retail studies connect market conditions with potential store space. They are not universal minimum requirements; each retailer applies its own sales targets, operating model, and site criteria.

5.2.2 Trade-Area Size and Population Calculation

A retail trade area is the geographic area from which a retail centre is expected to attract regular customers. It may include communities outside the retail centre's municipal boundary. The method uses four definitions:

- **Primary trade area:** communities with the strongest and most regular connection to the retail centre.
- **Secondary trade area:** nearby communities that use the retail centre but also have local stores or other shopping choices.
- **Tertiary trade area:** more distant communities that may visit for selected stores or services but less often.
- **Total trade area:** the combined population of all unique communities in the primary, secondary, and tertiary areas.

Step 1: Defining trade-area levels and market boundaries. The boundary for each retail centre was set using road access and travel distance, the presence of competing retail centres, whether local stores already exist in a community, and the regional role each centre plays.

For Shelburne, the Town and District of Shelburne form the primary area because the Town is the nearest retail and service centre for most of the district. Lockeport forms the secondary area: it is close enough to use Shelburne, but it also has its own businesses and access to Liverpool. Barrington and Clark's Harbour form the tertiary area because they sit farther west, where Yarmouth becomes a stronger competing centre.

For Yarmouth, the Town and District of Yarmouth, the District of Argyle, and Yarmouth 33 form the primary area. The District of Clare, the District of Barrington, and the Town of Clark's Harbour form the secondary area. The Town and District of Digby, Bear River (Part) 6, the Town and District of Shelburne, and the Town of Lockeport form the tertiary area.

Yarmouth's trade area is larger than Shelburne's or Queens' because Yarmouth plays a genuinely regional role, for two reasons. First, it already has an established base of large-format and comparison retail: the Town's Economy and Commercial Areas Discussion Paper (UPLAND Planning + Design Studio, June 2024) documents the Starrs Road corridor's function as a large-format retail and service area for the region. This kind of destination retail draws customers from a much wider area than convenience retail. Second, Yarmouth Regional Hospital provides emergency, diagnostic, surgical, and specialist care to an estimated 58,000 people across Shelburne, Yarmouth, and Digby Counties (Nova Scotia Health). A hospital of that size functions as a traffic generator: every visit is also a trip into Yarmouth that residents of Shelburne and Digby Counties would not otherwise make, and many are combined with shopping or errands.

For Queens, the Region of Queens Municipality together with the Medway River 11, Ponhook Lake 10, and Wildcat 12 reserve census subdivisions form the primary area. Lockeport forms the secondary area, and the Town and District of Shelburne form the tertiary area.

Step 2: Consistent population inputs. All figures use Statistics Canada's 2021 population estimates, based on the 2021 Census adjusted for undercounting. Each town, municipal district, regional municipality, and reserve census subdivision was entered separately and counted once

within each retail centre's calculation. County totals were not added when their municipalities were already listed, and Liverpool was not added separately because it is included in the Region of Queens Municipality. Trade areas may overlap across retail centres; this reflects real shopping patterns and does not duplicate population within an individual market total.

Step 3: Calculating the trade-area totals.

Table 19: Trade-area totals for Shelburne, Yarmouth, and Queens

Retail centre	Primary trade area	Secondary trade area	Tertiary trade area	Total
Shelburne	Town of Shelburne (100%): 1,673; District of Shelburne (100%): 4,458. **Subtotal 6,131**	Town of Lockeport (100%): 484. **Subtotal 484**	District of Barrington (40%): 2,681.2; Town of Clark's Harbour (40%): 298.4. **Subtotal 2,979.6**	**9,594.6**
Yarmouth	Town of Yarmouth: 7,017; District of Yarmouth: 10,338; District of Argyle: 8,084; Yarmouth 33: 187 (all 100%). **Subtotal 25,626**	District of Clare (100%): 7,862; District of Barrington (15%): 1,005.45; Town of Clark's Harbour (10%): 74.6. **Subtotal 8,942.05**	Town of Digby (5%): 102.4; District of Digby (5%): 371.8; Bear River (Part) 6 (5%): 7.2; Town of Shelburne (40%): 669.2; District of Shelburne (40%): 1,783.2; Town of Lockeport (40%): 193.6. **Subtotal 3,127.4**	**37,695.45**
Queens	Region of Queens: 10,676; Medway River 11: 15; Ponhook Lake 10: 15; Wildcat 12: 50 (all 100%). **Subtotal 10,756**	Town of Lockeport (10%): 48.4. **Subtotal 48.4**	Town of Shelburne (30%): 501.9; District of Shelburne (30%): 1,337.4. **Subtotal 1,839.3**	**12,643.7**

Source: Statistics Canada, Population Estimates, July 1, 2021, Table 17-10-0155-01. Figures with a decimal are not partial people; they result from applying a contribution percentage to a community's population. Where totals are rounded elsewhere in this report, they are rounded to the nearest whole person.

Each total was built in four stages. Every community was matched to its Statistics Canada population estimate; each community was assigned to exactly one trade-area level per retail centre; a contribution percentage was applied to every secondary and tertiary community, reflecting the share of its population who are realistic customers of that centre rather than a closer one (primary communities are always counted at 100%); and the results were summed by level and combined into the total.

For example, Shelburne's tertiary area includes the District of Barrington, whose estimate is 6,703 people. Because Yarmouth is a stronger, closer retail centre for Barrington residents, only 40% of that population (about 2,681 people) is counted toward Shelburne's tertiary trade area.

Step 4: Interpreting the results. These totals already reflect how likely each community is to shop at the retail centre. Secondary and tertiary communities are counted at between 5% and 40% of their population, because only part of their population is a realistic customer of that centre. Counting their full population, as earlier analysis did, would overstate the realistic customer base. Any further adjustment, for example for visit frequency or spend per visit, belongs in a separate spending-capture or retail-sales analysis, not in the population count. Detailed calculations and Statistics Canada source links are provided in the accompanying trade-area methodology spreadsheet.



Historic waterfront buildings, Shelburne Harbour

5.3 Retail and Service Inventory

The inventory below records which major retail and service brands operate in Shelburne and in the nearest comparison markets. It shows what residents already travel to find, and which formats the region already supports. It was built from store locators and business directories. ✔ means the location was verified; ✘ means it was not found in the sources reviewed (absence is likely but not proven); ? means it was not researched.

Table 20: Store-by-store commercial inventory

Category / brand	Shelburne (Town / MODS)	Barrington Passage	Yarmouth	Liverpool / Queens	Bridgewater
Sobeys	✔ 115 King St (Shelburne Mall)	✔ 3552 Hwy 3	✔ 76 Starrs Rd	?	✔ South Shore Centre
Atlantic Superstore	✘	✘	✔ 104 Starrs Rd	?	✔ 21 Davison Dr
Walmart Supercentre	✘	✘	✔ 108 Starrs Rd	✘	✔ Pine Grove
Giant Tiger	✘	✘	✔	?	?
Dollarama	✘	✘	✔ 130 Starrs Rd	?	✔ South Shore Centre
Canadian Tire	✘	✘	✔ 120 Starrs Rd	✘	✔ 16 Pine Grove Rd
Building supply	✔ Home Hardware, 201 Water St	?	✔ Kent	?	?
Mark's / Winners / Sport Chek / JYSK	✘	✘	✘	✘	✔ all four
Pharmacy	✔ Lawtons, 115 King St; TLC Pharmasave, 157 Water St	✔ Pharmasave, 22 Hwy 330	✔ Shoppers, Superstore, Sobeys	?	✔

Category / brand	Shelburne (Town / MODS)	Barrington Passage	Yarmouth	Liverpool / Queens	Bridgewater
Staples / The Source	✘	✘	✔ both	?	?
Tim Hortons	✔ 85 Ohio Rd	✔ 14 Hwy 330	✔	✔ (likely)	✔
McDonald's	✘	✔ 38 Hwy 330	? (likely)	?	? (likely)
Subway	✔ 41 Falls Lane	✔ 22 Hwy 330	✔	?	?
Pizza Delight	✘	✔ 3469 Hwy 3	✔	?	?
Mary Brown's / Boston Pizza / Pizza Hut	✘	✘	✔ all three	?	?
Tire / auto	✔ D&E Tirecraft, 27 Falls Lane	?	✔ Walmart Tire & Lube; Canadian Tire	?	✔ Canadian Tire
Brewery / winery	✔ Boxing Rock; District 33 Winery	—	—	—	—
Tesla Supercharger	✘	✘	✔	Named future location	✘
NS Power 180 kW DC fast charging	✘	✘	✔	✔	✔
Costco / Home Depot / Best Buy	✘	✘	✘	✘	✘ (Halifax only)

Several formats are absent in both Shelburne and Yarmouth counties but present in Bridgewater, namely Winners, Sport Chek, JYSK, and Mark's. Costco, Home Depot, and Best Buy are found only in Halifax. A second group is absent in Shelburne County but present in Yarmouth, Bridgewater, or both: Walmart, Canadian Tire, Atlantic Superstore, Giant Tiger, Dollarama, Shoppers Drug Mart, Staples, Kent, Mary Brown's, Boston Pizza, Pizza Hut, the Tesla Supercharger, and NS Power 180 kW charging.

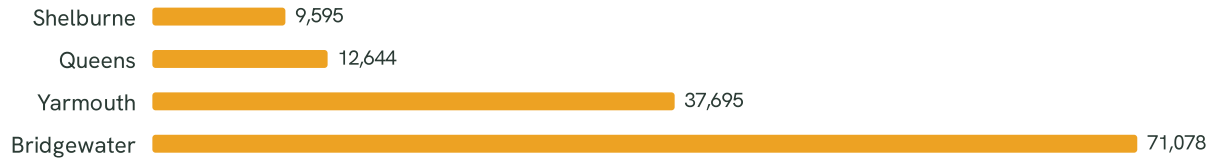
The trips residents make out of the county are for full-line discount, hardware and auto, and apparel. Yarmouth's Starrs Road strip already holds Walmart, Superstore, Canadian Tire, Dollarama, Giant Tiger, Shoppers, Kent, and Staples within a few hundred metres, and Bridgewater's South Shore Centre holds the apparel and home formats. Shelburne's catchment is too small to support a second copy of these stores, and the larger formats need far bigger trade areas than the three counties combined can provide. The nearest quick-service brands outside Shelburne are in Barrington Passage.

5.4 Market Gap 1: Relatively Small Trade Area

Shelburne County's total trade-area population is estimated at approximately 9,595 people. This is about one-quarter of Yarmouth's approximately 37,695-person trade area, about three-quarters of Queens' approximately 12,644-person market, and about one-seventh of Bridgewater's 71,078-person trade area. This smaller customer base makes supermarkets and other large stores harder to support. Smaller grocery stores, specialty retailers, and locally focused formats are more realistic for Shelburne County.

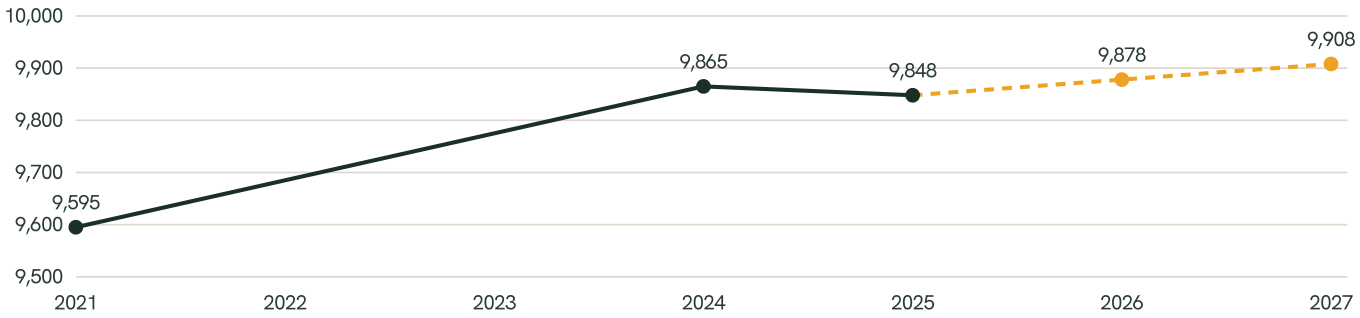


Shelburne's historic waterfront and harbour



Contribution-weighted trade-area population. Bridgewater figure from the Town's 2025 retail study.

5.4.1 Shelburne Trade-Area Population Trend, 2021–2027



Solid: Statistics Canada estimates (2022–2023 values not shown). Dashed: planning projection at 0.3% per year.

Figure 3: Shelburne trade-area population, 2021–2027. Sources: Statistics Canada annual population estimates (2021–2025); Manifold growth projections (2026–2027).

The total trade-area population increased from approximately 9,595 in 2021 to 9,865 in 2024, before declining slightly to 9,848 in 2025. It is projected to reach approximately 9,908 by 2027. Most potential customers are located in the primary area; the tertiary area represents a smaller share, and the secondary area a much smaller share still.

The 2026 and 2027 figures are planning projections. Because Statistics Canada has not yet published estimates for those years, the 2025 total was carried forward using Manifold's demographic forecast for Shelburne County (Census Division 1201), which projects growth of 0.3% per year over the next three years, from 14,303 to 14,431 (Manifold Data Mining Inc., 2026). Census Division 1201 includes the Municipal District of Shelburne, the Municipal District of Barrington, the Town of Shelburne, the Town of Clark's Harbour, and the Town of Lockeport.

The trend shows a stable and gradually expanding customer base. This supports existing businesses and smaller, flexible retail formats, but the modest pace of growth is unlikely to significantly increase demand for large-format retail in the near term. Visitors and travellers passing through are not counted in the trade-area population, so they add demand beyond these figures.

5.5 Market Gap 2: Low Customer Concentration

Retailers benefit when many people live, work, or travel near one store. Shelburne County has 12.5 residents and 6.1 households per inhabited square kilometre; Yarmouth has 29.4 residents and 13.4 households. Shelburne's inhabited area also covers 1,140 km^2, compared with 900 km^2 in Yarmouth, despite having fewer residents.

Shelburne's customers are therefore spread across longer distances. Residents may visit less often when a store is farther away, and businesses may face higher delivery costs and less predictable traffic. Retail opportunities are stronger at visible and accessible locations that serve several customer groups: local residents, highway users, workers, and visitors.



Shelburne's harbour front in autumn

5.6 Market Gap 3: Opportunity to Strengthen Market Growth



Historic waterfront buildings, Shelburne Harbour

Shelburne County's market is growing, but demand will build at a measured pace. Over ten years, population is projected to grow by 3.7% (compared with 7.2% in Yarmouth and 5.7% in Queens), households by 8.5%, and average household income by 19.2%. The household and income gains increase the customer base and local spending power, but moderate population growth means new demand will be added gradually. This favours phased expansion and smaller business formats that can enter at a manageable scale and grow as households and income increase.

5.7 Market Gap 4: Smaller Total Spending Market

Shelburne County households have meaningful spending power. Average annual consumption is approximately $53,873 per household, close to Yarmouth's $55,269. The main difference is the number of households: Shelburne generates $374.1 million in annual household consumption, compared with $665.1 million in Yarmouth and $243.4 million in Queens. Shelburne's total spending market is about 56% of Yarmouth's.

The local market is further reduced when spending leaves the community: 85.3% of survey respondents regularly travel outside Shelburne for services and amenities, and shopping for goods was the main reason for 55.9%. The gap is not caused by low spending per household; it results from fewer households and limited local capture. Retail development should focus on goods and services that residents already purchase but cannot easily access locally.



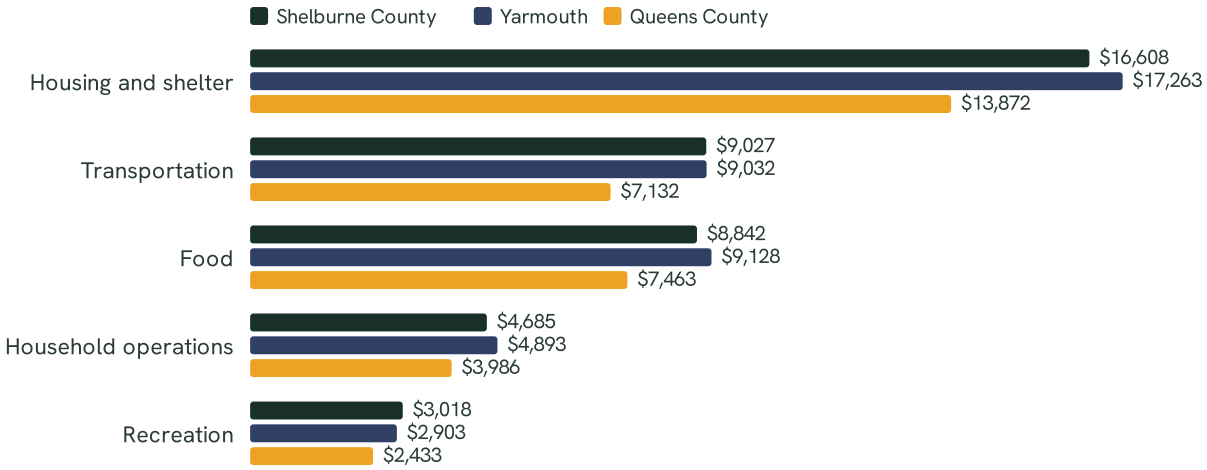
Shelburne's harbour front in autumn



Coastal beach at sunset

5.8 Top Five Areas of Household Spending

The same five categories account for approximately 78% of annual household consumption in Shelburne County, Yarmouth, and Queens.



Annual spending per household.

Figure 4: Top five areas of household spending, tri-county region. Source: Manifold market assessment data.

Table 21: Spending category breakdown

Spending area	What it includes	Shelburne County	Yarmouth	Queens County
Housing and shelter	Rent, mortgage payments, utilities, property taxes, repairs and renovations	$115.3M; $16,608 per household	$207.7M; $17,263 per household	$75.4M; $13,872 per household
Transportation	Vehicle purchases, fuel, repairs, insurance, public transportation	$62.7M; $9,027 per household	$108.7M; $9,032 per household	$38.7M; $7,132 per household
Food	Groceries, specialty food stores, convenience stores, restaurants	$61.4M; $8,842 per household	$109.8M; $9,128 per household	$40.5M; $7,463 per household
Household operations	Internet and telephone, childcare, pets, cleaning supplies, garden services	$32.5M; $4,685 per household	$58.9M; $4,893 per household	$21.7M; $3,986 per household

Spending area	What it includes	Shelburne County	Yarmouth	Queens County
Recreation	Recreation equipment, entertainment, facility fees, travel packages	$21.0M; $3,018 per household	$34.9M; $2,903 per household	$13.2M; $2,433 per household

Source: Manifold market assessment data. See Appendix A for calculations.

Shelburne households spend amounts close to Yarmouth households in several categories. Transportation spending is almost equal per household, recreation spending is higher in Shelburne, and food spending is substantial. However, the smaller number of households limits total sales in each category. Housing and shelter is the largest category but is not retail spending; transportation (including fuel), food (including restaurants and convenience stores), and recreation are the retail-related categories with the largest household spending.

5.9 Shelburne's Retail Market Readiness

The report card below summarizes how Shelburne performs across the four market conditions.



A community festival on the harbour

Table 22: Retail market readiness for Shelburne

Condition	Rating	Assessment
Trade-area size	Poor	The estimated trade area of approximately 9,595 people is a major constraint for supermarkets and other large-format stores.
Customer concentration and access	Adequate	The market can support retail, but dispersed customers favour accessible sites and smaller formats.
Growth outlook	Adequate	Population, households, and income are increasing, but additional demand will develop gradually.
Spending and market capture	Adequate	Household spending is solid, but the total market is smaller and a significant share is spent outside the county.

Overall, Shelburne County is better positioned for right-sized retail than for large, demand-intensive formats. The strongest prospects are businesses that address clear local gaps, limit fixed costs, combine related products or services, and attract more than one customer group. Capturing even part of the spending that currently leaves the county would strengthen existing businesses and create a stronger base for future retail growth.

5.10 Building Stronger Retail Demand Over Time



Shelburne's harbour front in autumn

Retail demand can become stronger and more reliable over time. The priority is to retain more local spending, concentrate customer activity, grow the household base, and attract additional customers from outside the county.

1. **Capture more of the spending that currently leaves the community.** Focus business development on goods and services residents travel elsewhere to buy. Support existing businesses to expand product lines, coordinate hours, and offer online ordering, delivery, or pickup, and track spending leakage regularly.
2. **Concentrate retail activity in visible and accessible locations.** New businesses have a stronger chance of success near existing stores, community services, employment areas, and major travel routes. Grouping shops, food services, and public amenities lets customers meet several needs in one trip.
3. **Cluster retail with other uses and community services.** Smaller and adaptable commercial spaces allow businesses to enter at a manageable scale and expand as demand grows. Population and household growth, including through the Municipality's own mixed-use plan, will add customers over time.
4. **Extend customer reach beyond county residents.** Connect retail promotion with Highway 103 traffic, tourism, events, the waterfront, and locally made products.

Together, these actions would strengthen existing businesses, retain more spending locally, and gradually create a larger and more dependable customer base for future retail development.

How a cluster on the 103 Property can grow the market. Shelburne's trade area of about 9,595 people shows where retail should start, not where it has to stop. A cluster can grow the market in three steps.

Table 23: How retail potential grows as the cluster grows

Step	What drives it	Retail it can support
Step 1: Today	What the 9,595 regular shoppers in the trade area can support now	Small grocery, value store, café or bakery, bank or credit union, quick-service food
Step 2: Add travellers	The highway stop brings in travellers on top of local shoppers; the region sees more than 180,000 overnight stops a year	More food brands, local products, convenience, and a hotel if demand is proven
Step 3: Grow and keep spending	Households grow about 8.5% over ten years, and spending now made in Yarmouth and Bridgewater stays in Shelburne	Professional offices, pharmacy and health retail, building supply, and more shop pads

Where each retail gap fits on the 103 Property. The store-by-store inventory points to specific gaps, and each has a natural place in one of the three nodes described in Section 10.4.

Table 24: Retail gaps and where they fit

Type of store or service	In Shelburne today	Nearest	Where it fits
EV fast charging	None	Liverpool, Yarmouth	Node 1: highway gateway
Fast food brands	Tim Hortons and Subway only	Barrington Passage	Node 1: highway gateway

Type of store or service	In Shelburne today	Nearest	Where it fits
Local products, taproom outlet	Downtown only	—	Node 1: highway gateway
Discount and value stores	No Dollarama or Giant Tiger	Yarmouth	Node 2: mixed-use cluster
Café, bakery, deli	Few options; residents asked for more	Yarmouth	Node 2: mixed-use cluster
Banking	52.9% rate services poor	Yarmouth	Node 2: mixed-use cluster
Professional offices	Residents travel for dentists and lawyers	Yarmouth, Bridgewater	Node 2: offices in the mixed-use cluster
Grocery, building supply	One Sobeys; Home Hardware	Yarmouth	Node 2: test small formats
Pharmacy, clinic space	Limited; care is out of town	Yarmouth, Bridgewater	Node 3: health and community campus
Experiential tourism: tasting room, artisan market, tour and outfitter hub	Scattered downtown and seasonal	—	Node 2: mixed-use cluster
Branded hotel	None; four hotels and motels, four inns	Yarmouth, Liverpool	Only if demand is proven

Large-format stores are not recommended: they need much larger trade areas and already serve the region from Yarmouth and Bridgewater.

06 Competitive Market Necessities

6.1 Current State
6.2 Demand and Absorption Indicators
6.3 Development Economics

ASBB



Marine industrial infrastructure on Shelburne Harbour

6.1 Current State

Shelburne's existing economic and physical assets provide the foundation against which market gaps, competitive positioning, and future investment opportunities are assessed.

Major industries and employers

- **Fisheries and aquaculture.** Shelburne County accounts for 49% of Nova Scotia's total aquaculture production (5,680,773 kg, valued at $57,437,181), and agriculture, forestry, fishing and hunting is the county's largest employer (1,810 workers, 27.4% of the labour force).
- **Manufacturing.** The second-largest employing sector (1,275 workers, 19.3%), supported by low commercial tax rates and available serviced land.
- **Marine industrial infrastructure.** The Shelburne Industrial Park (expanded by 12 hectares and 18 lots with road, power, water, and sewer), anchored by an Irving Shipbuilding ship repair facility and Cooke Aquaculture operations; and the Shelburne Marine Terminal and Ship Repair facility (752 m of wharfage, 9.75 m water depth, drydock capacity up to 4,000 tonnes, repair capacity up to Panamax-size vessels).
- **Roseway Hospital.** Identified by municipal staff as an existing community asset alongside natural and waterfront assets.

Hotels and short-term accommodation

The directory confirms only 4 hotels and motels and 4 inns currently operating in Shelburne, against 61 cottages and cabins and 71 Airbnb listings. Overnight capacity is overwhelmingly short-term-rental and cottage-based rather than hotel-grade, and named properties (Wildwood Motel, MacKenzie's Motel & Cottages, The Cooper's Inn) confirm a motel and B&B-dominated market with no branded or full-service hotel product. By comparison, the regional catchment includes branded hotel products absent from Shelburne: the Rodd Grand Yarmouth Hotel and a Tru by Hilton in Yarmouth, and the Best Western Plus Liverpool Hotel & Conference Centre and White Point Beach Resort in Queens County.

Industrial and marine-commercial supply

Under "Commercial & Industrial," the directory lists Marine (17), Small Craft Harbours (8), Welding & Machining (6), Utilities (6), Seafood Processing (5), and Manufacturing (2). The heavy weighting toward marine and seafood processing confirms the fisheries and ocean-industries orientation of Shelburne's commercial base, while the small manufacturing count shows that the local manufacturing base is not crowded.



Lobster traps and an inshore fishing boat



Historic waterfront buildings, Shelburne Harbour

6.2 Demand and Absorption Indicators

6.2.1 Demand Indicators

The following indicators are drawn from the community survey, the market research, and the jurisdictional scan, and summarize the demand evidence by sector. They are carried into the opportunity assessment later in this report.

Table 25: Demand indicators by sector

Sector	Demand evidence
Healthcare	Seniors (65+) make up the largest share of the population (28.57%). Residents rated local access to healthcare poorly (55.9% poor, 38.2% fair, 5.9% good), and 85.3% regularly travel outside Shelburne for recreation, shopping, and healthcare.
Accommodation and tourism	The region sees over 180,000 direct overnight stops per year, yet Shelburne has only 4 hotels and motels and 4 inns, against 61 cottages and cabins and 71 Airbnb listings, with no branded or full-service hotel. Bridgewater's accommodation study found demand for a boutique hotel of 20 to 40 rooms, with annual occupancy of 66%.
Retail	The trade area of about 9,595 people is small; 56% of residents travel outside Shelburne to shop for goods, and 28% identify retail and amenities as missing. Annual household consumption in the county is $374.1 million, so demand exists but is best met by small-format retail.
Highway traffic and traveller spending	Highway traffic adds customers not counted in the trade area. Market research identified spending on gasoline ($13.5M), restaurants ($11.0M), and recreational vehicles ($4.5M), and transportation spending per household ($9,027) is close to Yarmouth's ($9,032).

Taken together, these indicators show that demand is strongest where it draws on both residents and travellers, and weakest for large-format retail, which the size of the trade area cannot support.

6.2.2 Housing Context

Housing is being addressed through the Municipality's own mixed-use plan. The Turner Drake housing memo is summarized below as context for workforce and service needs. It examines current housing demand and projections over the 2024–2034 period, and shows substantial demand in the coming years.

The analysis estimates total net dwelling demand ranging from 5 to 480 units, with an average requirement of approximately 250 units by 2034. Demand incorporates projected household growth and existing housing pressures:

- **Suppressed households:** households that might have existed if housing conditions were healthy.
- **Extreme core housing need:** households requiring adequate and affordable housing.
- **Vacancy:** additional dwellings needed to reach a 3% vacancy rate.
- **Anticipated demand growth:** additional dwellings needed from household growth, adjusted for non-permanent dwellings.

Shelburne has averaged approximately 20 new units annually, and under the average scenario this pace could result in a 50-unit housing deficit by 2034. Depending on the scenario, an additional 2.5 to 14 units per year above the historical rate may be required. The projections may understate actual demand because they do not fully capture regional spillover demand or foreign-worker housing needs: at least 77 foreign workers were identified locally, and approximately 60 new families associated with a planned long-term-care expansion could move to Shelburne by 2027.

6.3 Development Economics



Shelburne's harbour front in autumn

Indicative land and servicing costs

The combined area of the 103 Property is 284 acres, with a combined assessed value of $118,500. The largest development cost is servicing, as the property is currently undeveloped.

The MPS makes developers responsible for building local roads, water, wastewater, and stormwater systems required to service new subdivisions. When infrastructure is transferred to the Municipality following construction, it requires ongoing operations and maintenance expenditure at the Municipality's expense.

Property tax rates also play an important role in land costs. After development occurs, property taxes are recalculated in line with the new value. Under Council's current budget, the residential and resource tax rate remains at $1.26 per $100 of assessment and the commercial rate at $1.82 per $100 of assessment. The higher commercial rate is a consideration for commercial development and a reason to consider phased-taxation and cost-sharing tools (see Section 7.12). Indicative rents, revenues, and development costs have not yet been estimated for the 103 Property; they would need to be developed with prospective operators and partners.

Municipal contributions and incentives

The Municipality's existing incentive programs are oriented toward housing, so they do not directly support commercial development. Tools that the jurisdictional scan shows can support commercial development, such as phased taxation, servicing cost-sharing, municipal fee rebates, and tax increment or employment creation grants (Section 7.12), would need to be designed for the 103 Property.

For context, the MPS states that it is Council policy to encourage diverse housing projects, especially affordable housing, that are accessible (near community services and transportation routes), affordable, energy efficient, and mixed-use. MODS has established the Housing Incentive Program, with a potential ongoing budget of $300,000. Applications require a business plan, project budget, funding sources, construction timeline, unit information, and proposed rent structure; the policy gives priority to non-profit organizations and may prioritize developers approved under the provincial housing program. This is funded by the Housing Accelerator Fund, for which MODS received $1.546 million.

07 Jurisdictional Scan

7.1 Glooscap Landing, Kings County, Nova Scotia
7.2 Caledon, Ontario
7.3 High River Highway Commercial Centre, Foothills County, Alberta
7.4 North Caledonia, Haldimand County, Ontario
7.5 Lacombe County, Alberta
7.6 Agerton Secondary Plan, Milton, Ontario
7.7 Windsor, Nova Scotia (West Hants Regional Municipality)
7.8 Halifax Regional Municipality
7.9 Bridgewater, Nova Scotia
ASBB



Historic waterfront buildings, Shelburne Harbour

A jurisdictional scan was conducted to evaluate how municipalities with similar characteristics approached land development. Six case studies of communities with similar characteristics, including governance structure, leadership approach, site characteristics, and development context, were used.

Finding examples that aligned across all criteria was challenging; some case studies therefore differ in population size and municipal ownership of lands while remaining relevant in other key areas, mainly financial capacity and the ability to attract investment within available funding resources. Interviews were also conducted with the Director of Planning of the West Hants Regional Municipality, a regional planner from Halifax Regional Municipality, and the City of Moncton's Director of Economic Development and Immigration, to understand how mixed-use and commercial development is managed and strategies for investment readiness.

Each case study closes with a short note on its relevance to the 103 Property. Ontario's ONroute highway service centres (Section 7.11) are included as a further reference for planned, highway-integrated services; because ONroute is a provincially procured corridor network rather than a single municipal site, it is described separately and is not part of the comparison in Table 22.

Table 26: Criteria for case studies

Criteria	Glooscap Landing	North Caledonia	Agerton Secondary Plan	Caledon, Ontario	Foothills County	Lacombe County
Population	62,914	56,059	158,022	93,100	26,238	11,171
Municipal ownership of lands	✔	✔	✔	Privately held	Privately held	Privately held
Strategic highway-adjacent location	✔	✔	✔	✔	✔	✔
Financial feasibility and comparability	✔ Requires infrastructure funding	✔ Requires alternative financing	Coordinated investment required	Not evaluated	Not evaluated	✔ Some areas require future infrastructure investment

Criteria	Glooscap Landing	North Caledonia	Agerton Secondary Plan	Caledon, Ontario	Foothills County	Lacombe County
Comparable scale for development	✔	✔	✔	✔	✔	✔
Canada	✔	✔	✔	✔	✔	✔

7.1 Glooscap Landing, Kings County, Nova Scotia



Example of the format: fuel, convenience, and a drive-thru on one site

Feasible under certain conditions.

Background. The Glooscap First Nation Economic Development Corporation engaged Stantec to conduct a feasibility study and concept plan for lands owned by the Glooscap First Nation Band at Exit 8A on Highway 101. The study evaluated market feasibility, what can be built on the land and whether the site can support it, community demands, and financial feasibility.

Area. Two properties (PID 55234439, 19.5 acres; PID 55234454, 5.3 acres), a combined 24.8 undeveloped acres in the southeast quadrant of the interchange off Ben Jackson Road, about 11 minutes (6.2 km) from the Glooscap Reserve.

Plan for the area. A commercial vehicle service (gas station or truck stop, car wash); commercial market and restaurants in leasable space; a stormwater management pond; a cultural centre; pow wow grounds; a pedestrian bridge across the pond; a preserved stand of birch trees as a buffer; and a tall structure or sign to identify Glooscap Landing to highway travellers. It combines commercial development, tourism, and green space.

Partnerships. Glooscap First Nation (landowners); Glooscap First Nation Economic Development Corporation (project managers); Stantec; Altus Group and Tom McGuire of TM Solutions (real estate); community members; and the Municipality of Kings County.

Market and population. Businesses can draw on the adjacent Town of Hantsport and the populations of Kentville, Wolfville, and Windsor, and the site is a potential employment centre for Reserve residents. Exit 8A sits in a substantial gap between commercial nodes at Exit 5A (Windsor) and Exit 12 (New Minas) where no gas or food is available on the highway.

Development trigger. Glooscap First Nation created its Economic Development Corporation to pursue economic self-sufficiency, and Glooscap Landing became the flagship project, driven by highway access, the lack of nearby commercial nodes, and tourism traffic to Windsor, Mt Denson, and Scots Bay.

Table 27: Feasibility of Glooscap Landing

Feasibility	Feasible?	Notes
Community	Yes	Community engagements confirmed priorities: economic benefits for Glooscap First Nation, employment opportunities, and cultural representation.
Financial	Yes	Three funding scenarios were evaluated. The project is only feasible with infrastructure funding, planned through the Community Opportunities Readiness Program (CORP). Revenue potential (rent by phase) and investment requirements were assessed.
Market	Yes	Draws on Hantsport, Kentville, Wolfville, and Windsor, and is within 10 minutes of the Glooscap Reserve.

Key lessons for investment readiness

- **Strategic location isn't enough; there needs to be a clear development plan.** A long-term plan identifies target industries, site concept, infrastructure strategy, phasing, financial sustainability, and implementation, which increases investor confidence and reduces risk.
- **Validate market demand through service gap analysis.** The unmet retail and commercial demand between Windsor and New Minas strengthened the case for investors.
- **Infrastructure readiness is often the determining factor.** Even with demand, the project was only feasible with infrastructure funding.
- **Phased development reduces financial risk.** Early phases attract investment and generate revenue that supports later phases.
- **Community support strengthens viability.** Engagement defines priorities and improves social acceptance.
- **A mixed-use plan diversifies revenue.** Complementary activities increase visitation and reduce reliance on one business or market segment.

> Relevance to the 103 Property
>
> Glooscap Landing shows how a highway-adjacent site can be developed around demonstrated unmet retail demand. Its reliance on infrastructure funding also shows why servicing and highway access need to be confirmed for the 103 Property parcels before they are brought to market.

7.2 Caledon, Ontario

Feasible according to the conditions evaluated.

Background. A proposed five-storey hotel and parking area at 12476 Highway 50, Town of Caledon, on a property with an existing convenience store and gas station.

Area. A rectangular 1.05-hectare lot on the southwest corner of Highway 50 and George Bolton Parkway, with a retail fuel outlet and convenience store in the southeast corner and the rest vacant.

Partnerships. BVD Bolton Hospitality Inc. (proponent and landowner); Deanlee Management Inc. (planning consultant); Toronto and Region Conservation Authority (environmental review); and the Town of Caledon.

Market and population. Highway 50 is a heavily used GTA highway, and the intersection provides excellent visibility and access. The property lies within Bolton's Highway Commercial and Prestige Industrial area, surrounded by employment lands that generate business travellers, contractors, and visitors.

Development trigger. Underutilized land beside an existing fuel and convenience node could be intensified with a complementary hotel.

Table 28: Feasibility for Caledon

Feasibility	Feasible?	Notes
Site	Yes	On Highway 50 with strong visibility, an existing commercial use, and an existing access point from George Bolton Parkway.
Infrastructure	Yes	Engineering infrastructure is available without a major upgrade.
Environmental	Yes	Supporting studies addressed environmental impacts, stormwater management, and natural heritage.

The report did not evaluate financial feasibility; the project relies on private investment, existing site infrastructure, and market-driven hotel investment.

Key insights for investment readiness

- **Maximizing underutilized land creates strong opportunities** without new land acquisition.
- **Existing infrastructure significantly improves readiness,** reducing risk, cost, and timelines.
- **Complementary uses strengthen the business case:** the hotel serves the same business travellers, contractors, and highway users as the fuel station.
- **Technical due diligence reduces risk** by identifying challenges upfront.

> Relevance to the 103 Property
>
> Caledon shows how a highway site with a fuel station and convenience store can add a complementary use, with the fuel and convenience uses continuing to generate revenue in the tourism off-season. It also shows the advantage of a site that already has an access point and available servicing, which the 103 Property currently lacks.

7.3 High River Highway Commercial Centre, Foothills County, Alberta



Concept rendering: heavy-truck charging bays

Feasible, but requires financing for infrastructure.

Background and area. A proposed highway-side commercial centre on the northeast corner of the intersection of Highways 2 and 23, about 30 minutes from Calgary. Highway 2 is a designated freeway trade route under NAFTA, and the land was envisioned as a regional highway

commercial gateway serving the Calgary–Lethbridge/Edmonton corridor, trucking traffic, tourists, and the surrounding regional population.

Plan for the area. A travel centre and truck stop, gas station, restaurants, a retail outlet mall, a farmers' market, and an RV campground, integrated into a single commercial node with a coordinated internal road network and shared infrastructure.

Partnerships. Highwood Management Consultants (landowners); Stonefield Development Consultants (lead planning); Bel-MK Engineering Ltd. (infrastructure, servicing, and access); Foothills County (approval authority).

Development trigger. The strategic location at two major highways, with high visibility, access to regional and long-distance traffic, and proximity to High River; tourism demand; and the opportunity to turn agricultural land into revenue-generating development.

Table 29: Feasibility for Foothills County

Feasibility	Feasible?	Notes
Site	Yes	Located at two highway intersections on a freeway with heavy traffic.
Infrastructure	Conditional	Requires investment and further planning; servicing is a key factor. Phased development in five phases is recommended.
Land availability	Yes	A large, undeveloped land base allows careful, planned development.

Key insights for investment readiness

- **Infrastructure is often the primary constraint.** Roads, utilities, and servicing required significant financing before commercial development could occur.
- **Phased development reduces investment risk** and lets infrastructure expand with demand.
- **Integrated planning creates stronger opportunities,** reducing financial and operational risk.
- **Tie demand to identifiable user groups,** such as tourists and travellers.

> Relevance to the 103 Property
>
> High River is a comparable for a highway-side commercial centre. Its plan integrated a travel centre, fuel, restaurants, and retail into a single node with shared infrastructure, and its finding that the project was feasible but required infrastructure financing is directly relevant to the Highway 103 sites.

7.4 North Caledonia, Haldimand County, Ontario

Feasible under certain financing scenarios.

Background. The North Caledonia Employment Lands Feasibility and Servicing Study assessed whether approximately 184 hectares beside Highway 6 could become future employment lands, which type of development would be most suitable, and the financial implications.

Area. Adjacent to Highway 6 and near Highway 403, with access to Hamilton, Brantford, Toronto, Niagara, and the U.S. border, and near John C. Munro Hamilton International Airport. About 99.3 of the 184 hectares are net developable after natural features, stormwater areas, roads, and woodlots. The lands are primarily agricultural with some light industrial uses.

Plan for the area. A general employment area focused on manufacturing and light industrial uses (clean technologies, electrical components, light assembly, advanced manufacturing), many with low wastewater requirements that can operate under interim servicing; distribution and logistics; agri-business; and construction and trade services, developed incrementally to avoid premature infrastructure investment.

Partnerships. Haldimand County (landowner and decision-maker); Watson & Associates Economists Ltd.; WSP Canada Group Limited; and GM BluePlan Engineering.

Market and development trigger. The site's position in the Greater Golden Horseshoe and near growing centres such as Hamilton, with spillover population and industrial growth, and the County's recognition that more employment lands were needed.

Table 30: Feasibility for North Caledonia

Feasibility	Feasible?	Notes
Financial	In certain scenarios	Traditional full municipal servicing created sustained negative cash flows over 30 years in several scenarios. With alternative financing and ownership models for infrastructure and buildings, the project was feasible and profitable.
Community	Yes	Engagement was a major component of every phase, identifying concerns and priorities.
Economic	Yes	Larger parcels at lower cost than surrounding urban markets, with access to major corridors.
Planning	Yes	Reviewed Official Plan policies, Provincial Planning Statement requirements, employment area designation, and permitted uses.

Key insights for investment readiness

- **Investment-ready sites need a comprehensive assessment** of market demand, infrastructure capacity, servicing, and financial feasibility.
- **Build on regional competitive advantages** rather than attracting industries with little connection to the local economy.
- **Let market demand guide target sectors,** not speculative demand.
- **Test multiple financial scenarios** to find financially sustainable approaches and justify plans to investors.
- **Phased development reduces municipal and investor risk** and times infrastructure with demand.
- **Align with provincial policy** to reduce regulatory uncertainty for investors.

7.5 Lacombe County, Alberta

Background. The Highway 2 Corridor Economic Development Study, Phase 2: Land Use Strategy, evaluated the development potential of highway-adjacent lands, including the Blackfalds South area at the Highway 2 / Highway 597 interchange, the Lacombe West site, and the Morningside site. The Highway 2 corridor between Edmonton and Calgary is a critical link in the CANAMEX trade corridor, carrying 20,000 to 25,000 vehicles per day.

Plan for the area. Industrial businesses, trucking and logistics, warehousing and distribution, and manufacturing and industrial services, plus a planned business and commercial area for employment uses requiring highway exposure, delivered as coordinated business and industrial parks rather than individual commercial sites.

Partnerships. Lacombe County (lead), the Town of Blackfalds, external consultants, and private landowners.

Development trigger. The need for economic growth and employment, and the desire for coordinated growth on strategically located highway-adjacent lands.

Table 31: Feasibility for Lacombe County

Feasibility	Feasible?	Notes
Location	Yes	Strategic sites near major intersections with heavy daily traffic.
Site / land	Yes	Larger parcels allowed planned development rather than isolated applications.
Market demand	Yes	Existing trucking, industrial, and storage uses indicated demand for highway-oriented employment uses, though no further analysis identified business types.

Feasibility	Feasible?	Notes
Infrastructure	In some sites	Some areas had limited servicing capacity, so development intensity depends on future investment.

Key insights for investment readiness

- **Identifying the right development type strengthens the case,** through market research, spending and leakage analysis, and community engagement.
- **Infrastructure capacity must be addressed before development can scale.**
- **Existing businesses can demonstrate market demand** and strengthen investor confidence.
- **Large, undeveloped parcels** allow business parks rather than fragmented developments.

7.6 Agerton Secondary Plan, Milton, Ontario

Feasible as a long-term mixed-use area under a comprehensive planning and infrastructure framework, if delivered incrementally.

Area and plan. A large growth area along Trafalgar Road, south of Highway 401 and north of Derry Road, coordinated with the Trafalgar Secondary Plan. It comprises a Protected Major Transit Station Area for a high-density mixed-use community, an Employment Area, Business Commercial Areas, community uses, and housing.

Partnerships. The Town of Milton (lead), Malone Given Parsons Ltd., Watson & Associates Economists Ltd., provincial agencies and infrastructure stakeholders (Highways 401, 407, and the future 413), landowners, and the public.

Development trigger. The need for additional urban lands to accommodate projected growth in the GTHA, and for employment growth to keep pace with population growth.

Table 32: Feasibility for Milton

Feasibility	Feasible?	Notes
Infrastructure	Requires coordinated investment	Infrastructure planning was integrated into the Secondary Plan rather than addressed after development pressures emerged.
Economic	Yes	Proximity to major corridors is a major advantage; the plan is expected to generate 17,500 jobs.
Financial	Requires investment	Large-scale greenfield development needs substantial upfront investment before benefits are realized, so it must be phased.
Community	Yes	Consultation shaped priorities on design, recreation, transportation, and environmental protection.

Key insights for investment readiness

- **A clear development plan** communicates what the area will become over 25 years, not just land uses.
- **Plan infrastructure before development;** transit and transportation investment unlock growth.
- **Integrate employment and housing** so people live close to jobs.
- **Strong intergovernmental coordination** reduces implementation risk and increases investor confidence.

7.7 Windsor, Nova Scotia (West Hants Regional Municipality)

ASBB interviewed the Director of Planning of the West Hants Regional Municipality to understand how Windsor's commercial development was established, including the role of municipal planning, infrastructure investment, partnerships with private developers, and development approvals. Development in Windsor grew from concept-stage planning on purchased and surplus municipal land into a broader mix of urban and rural commercial activity, historically shaped around highway-commercial nodes.

- **The municipality's role** is to review proposals and lead community consultation to establish vision, priorities, and benefits, creating the conditions that encourage private investment rather than developing projects directly.
- **Servicing boundaries** heavily influence where growth can happen. Smaller municipalities have far less room to absorb infrastructure costs upfront and must look to other financial tools.
- **Anchor development** catalyzes surrounding smaller business and residential infill and reduces investor risk, but usually requires the municipality or an economic development officer to actively broker developer relationships.
- **Community consultation before development** is critical; proposals discussed with the community before formal decisions face less opposition.
- **Constraints for small municipalities:** water and sewer must be in place before development; a community vision set early avoids project-by-project negotiation; and flexibility should be anchored in planning documents and community priorities.
- **Strategies:** serviced land attracts developers; financial incentives are a valuable low-cost tool; phased taxation eases the immediate cost for developers while a provincial cap ensures the municipality still collects at least 50% of the added revenue over the period (Bridgewater already has such a program); and cost sharing on upgrades that also benefit the community, especially at the edge of serviced boundaries.

7.8 Halifax Regional Municipality

ASBB interviewed a regional planner from HRM to understand how mixed-use and commercial development is managed under the Regional Centre Plan.

- **Mixed-use developments:** plan for complete communities that balance residential and commercial space, walkability, transit, and proximity to services. Commercial space should be added where there is genuine market demand.
- **Public investment as a catalyst:** investments such as the Halifax Central Library, public squares, waterfront redevelopment, transit, and streetscapes build developer confidence and reduce risk for first movers.
- **Flexibility and predictability:** developers value predictable approvals and clear permitted uses, with room to respond to market conditions, anchored in planning documents.
- **Forward planning:** anticipate schools, health services, recreation, transit, utilities, and emergency services as populations grow.
- **Municipal land strategy:** decide strategically when to sell and when to retain public land, considering density requirements, market conditions, interest rates, sales to non-profits, and strategic parcels for future needs. The Halifax Waterfront is the clearest long-term success.
- **Infrastructure and cost-sharing:** developer contributions toward roads, water and wastewater, parks, and facilities, increasingly formalized through development cost charges, show that cost sharing is not limited to small municipalities.
- **Municipal finance tools:** development charges, cost contributions, and commercial taxation are being explored as sustainable revenue tools.

7.9 Bridgewater, Nova Scotia

Meaningful unmet capacity for retail floorspace and a boutique hotel, contingent on population growth and downtown revitalization.

Background. The Town of Bridgewater commissioned Fowler Bauld & Mitchell Ltd. (FBM) to complete a Retail Market and Accommodations Analysis (January 2025), including parts of the Municipality of the District of Lunenburg in Hebbville, Cookville, and Wileville, to document

business inventories, define trade areas, and identify retail and commercial gaps.

Area. Bridgewater covers 13.6 km^2, on Highway 103 about an hour southwest of Halifax, and serves as the commercial hub of the South Shore, organized around eight commercial nodes including Downtown East and West, Exit 12A, and Exit 12 (Osprey Village). The 2024 trade area population is 71,078: the Town (9,626), the Primary Trade Area including the Town (53,257), STA East (11,153), and STA West (6,668).

Plan for the area. By 2034, Bridgewater could support an additional 193,613 sq ft of retail at current market share, rising to 336,317 sq ft if market share increases by about 5%. Demand modelling supports a 20- to 40-room boutique hotel by 2032–2034 near Downtown and the LaHave River. The Exit 12A interchange unlocked almost 125 acres of light industrial and commercial land, better suited to light industrial, flex, and large-format "compatible" retail.

Partnerships. The Town of Bridgewater (lead); FBM; Manifold Data Mining Inc.; AirDNA LLC and Tourism Nova Scotia.

Market and population. The Town is projected to reach 10,332 residents by 2034 (+7.3%) and the Total Trade Area 75,942 (+7.1%), with average Town household income rising from $76,312 to $103,104 (+35.1%). Growth is anchored by a $300 million Michelin expansion, a $112.7 million South Shore Regional Hospital expansion, and an almost $51 million Exit 12A interchange, expected to bring 2,600 to 2,900 new residents supported by roughly 1,300 housing units. Retail spending potential is $1.19 billion (2024), but local retailers capture only about 30.6%, meaning roughly 70% of spending leaks out, notably more than comparable towns such as New Minas, Yarmouth, or Truro (40% to 45% retention).

Development trigger. The convergence of the three catalytic investments with a persistent leakage gap. Retail space per capita (19.5 sq ft in the PTA) sits below the 25–30 sq ft benchmark, and sales productivity of $301 per sq ft is healthy, so new entrants would be additive.

Table 33: Feasibility for Bridgewater

Feasibility	Feasible?	Notes
Retail demand	Yes	$1.19B trade-area spending at 30.6% share supports 193,613 sq ft of new retail by 2034, or 336,317 sq ft with a 5% share increase. Grocery and specialty foods, and home improvement and gardening, are the largest gaps.
Accommodations demand	Yes	Hotel occupancy averages 66%, above the 65% benchmark, supporting a 20- to 40-room boutique hotel by 2032–2034 (as few as 25 rooms feasible by 2032).
Site / land (Exit 12A)	Yes, with conditions	125 acres unlocked, recommended for light industrial, flex, and compatible large-format retail rather than downtown-style retail.
Downtown revitalization	Requires targeted investment	15.5% gross downtown vacancy (about 8% excluding two legacy spaces). Feasible with residential intensification, flexible leasing, a pedestrian river crossing, and a Downtown BIA.

Key insights for investment readiness

- **Retail follows rooftops.** As residential density near downtown declined, so did retail support; housing mix and density near the downtown are essential.
- **Retail leakage signals opportunity** rather than a saturated market.
- **Catalytic anchor investment de-risks surrounding development.** Over $460 million in combined investment is driving demand for housing, retail, and accommodation.
- **Occupancy is the clearest leading indicator for hotel investment,** alongside short-term rental growth (Airbnb listings up 12% year over year).
- **Not all vacancies are a red flag;** distinguishing legacy spaces from healthy turnover is critical.
- **A clear target-tenant list and downtown governance** increase investor confidence.

Relevance to the 103 Property

Bridgewater is the closest local benchmark for accommodation demand: demand modelling supports a boutique hotel of 20 to 40 rooms, and annual occupancy of 66% sits above the 65% benchmark. Its hospital expansion acts as a catalytic investment, and its Exit 12A interchange shows that major investments can justify highway access improvements. Exit 12A is a comparable only; the 103 Property is located at Exits 25 and 26.

7.10 Industrial Development in Moncton, New Brunswick

ASBB interviewed the City of Moncton's Director of Economic Development and Immigration about its downtown and industrial development. Since 2017, 1,500 new residential units have been built, compared with none from 2010 to 2016, and building permit investment has grown from $13 million to $52 million.

- **A dedicated economic development team,** separate from planning, with clear investment targets and a proactive mandate, and a coordinated development review process across departments.
- **Local market focus:** priority to local investors who already know and are committed to the market, applying an 80/20 rule.
- **Financial incentives:** reimbursing building permit and planning fees for vacant properties, redevelopment grants, and heritage incentives, also used to steer design outcomes such as underground parking and taller buildings.
- **Land disposition with safeguards:** a formal policy with a reacquisition clause, so the City can repurchase land if development does not proceed.
- **Relationship-building:** proactive, responsive engagement with developers through conferences (Atlantic Real Estate Forum, International Downtown Association) and industry associations, treated as long-term infrastructure.
- **Labour and services as investment factors:** developers weigh access to labour and healthcare almost as heavily as land and financing; the City runs job fairs and works with the Moncton Construction Association to help retain skilled crews.
- **Division of roles with the province:** the province leads investment attraction, while the City focuses on being ready to execute.

Relevance to the 103 Property

Moncton's finding that developers weigh access to labour and healthcare shows that the availability of local services influences where commercial development locates, in addition to their value to residents.

7.11 Ontario's ONroute Highway Service Centres

Background. ONroute is the network of 23 highway service centres on Ontario's busiest highways (19 on Highway 401 and four on Highway 400). Twenty were rebuilt between 2010 and 2013 under a design-build-finance-maintain public-private partnership procured by Infrastructure Ontario, at a reported construction cost of about $300 million. It is the best-known Canadian example of planned, highway-integrated service stops combining fuel, food, parking, and EV charging, but it differs in scale and ownership: it is a provincial program on very high-volume 400-series highways, and Highway 103 traffic near Shelburne is a small fraction of those volumes. ONroute is therefore a reference for format and delivery approach rather than a benchmark for demand.

Delivery model and partnerships. Host Kilmer Service Centres (HMSHost, Kilmer Van Nostrand, and EllisDon) financed, built, and maintains the centres under a long-term agreement with the Province, with financing from the Bank of Nova Scotia and TD. The fuel brand is reported differently across sources (Canadian Tire in earlier reporting; Petro-Canada, with ON Market convenience stores and Tim Hortons at every location, in more recent reporting), and should be confirmed. Secondary sources report a 50-year concession to about 2060, with the operator interest sold to Arjun Infrastructure Partners and Fengate Asset Management in 2019. The term, land ownership, and rent arrangements should be verified with Infrastructure Ontario before they are relied on.

Services. Each centre operates 24/7 with fuel and a convenience store, Tim Hortons and a rotating mix of quick-service brands, truck and car parking, accessible washrooms, WiFi, and pet areas, built to LEED Silver, with about 100 to 150 jobs per centre (about 2,500 in total). Infrastructure Ontario reports 20 of the 23 centres were redeveloped, while other sources report 22 operating, so the count is approximate. No traffic or sales figures were available in the sources reviewed.

EV charging. Ivy, a joint venture of Ontario Power Generation and Hydro One, is ONroute's exclusive EV charging partner. It opened its first six sites in February 2022 and planned 69 DC fast chargers across all 23 locations (two to four per site, up to 150 kW), supported by a $3.45 million loan from Natural Resources Canada.



ONroute Cambridge service centre, Highway 401

Table 34: ONroute project facts

Item	Detail
Location	Across Ontario, from the Quebec to the Michigan border, on Highways 401 and 400
Owner	Infrastructure Ontario
Client	Host-Kilmer
Architect	Quadrangle Architects Ltd.
Size	20 sites, each 8,000–20,000 sq ft (about 800–1,900 m^2)
Construction value	About $300 million
Procurement	Design Build Finance Maintain
Completion	2013
Certification	LEED Silver
Jobs	About 100–150 per centre, about 2,500 in total
EV charging	69 fast chargers planned across 23 stops through Ivy; first six opened February 2022 (Cambridge North and South, Napanee, Odessa, West Lorne, Dutton); a $3.45 million federal contribution covered about 30% of the cost

Quadrangle Architects project profile; Ontario Power Generation (February 2022); Infrastructure Ontario.

Economic and tax lessons for Shelburne. ONroute shows the economic value of a well-run highway stop: year-round jobs, traveller spending captured along the corridor, and charging added later at low public cost through a utility partner. Because ONroute sits on provincial highway land under a provincial concession, its tax arrangements are not a guide for Shelburne. The 103 Property is municipal land, so a stop there would add commercial assessment, taxed at the commercial rate, on land that brings in no tax revenue today (Section 12.1).

Highway access. Centres are listed by exit and direction of travel, with separate facilities for each direction, reached directly from the highway.

Key insights for investment readiness

- **Direct highway access is built into the format.** A site that makes drivers exit and follow another road captures less traffic, so where direct access is not available, clear advance signage and a short route matter most.
- **A single operator-ready package reduces risk,** shifting build and maintenance risk to the operator.
- **Recognizable fuel and food brands** give operators and drivers confidence.
- **EV charging can be layered on with public support** through a utility-backed partner.
- **The Province controls access and signage.** In Nova Scotia, direct access to Highway 103 and advance signage are provincial matters.

> Relevance to the 103 Property
>
> ONroute shows what a planned highway service stop looks like in practice: fuel, quick-service restaurants, truck and RV parking, and DC fast charging, reached directly from the highway. It does not transfer directly in scale, delivery model, or demand, so any comparison with Highway 103 should wait for mainline traffic data. The Province's role in access and signage is the main practical point for the Municipality.



Example of the format: DC fast chargers beside parking stalls



Example of the format: a canopy-covered EV charging station

7.12 Antigonish County, Highway 104, Nova Scotia

Background. Antigonish County is a close Nova Scotia example of growth at highway exits through development agreements, on a rural highway with traffic closer to Highway 103's than Ontario's 400-series highways.

Table 35: Antigonish County highway exit developments

Location	What is there	How it was delivered
Nova Landing, Highway 104 and Trunk 7	A Microtel Inn & Suites by Wyndham with a restaurant, meeting space, and EV charging; a larger highway-oriented commercial development approved beside it	Development agreement with Nova Construction, revised and approved by County Council in November 2021
Beech Hill Business Park, Exit 33	More than 80 acres of commercial and light industrial land with full municipal services and flexible lot sizes; a gas station with convenience store and restaurant proposed on Lot 9	Development agreement advanced by County Council in 2025 (status of construction to be confirmed)
Bayside Travel Centre, Exit 36-B (Paqtnkek Mi'kmaw Nation)	An $11 million travel centre: Esso fuel, diesel cardlock, truckers' lounge, two quick-service restaurants, an NSLC agency store, and visitor information	First Nation-led, at a new Highway 104 interchange opened in 2018, with federal support

989 XFM (November 2021); Eastern District Planning Commission; Tourism Antigonish; Paqtnkek Mi'kmaw Nation; Indigenous Services Canada (2019).

Key insights for investment readiness

- **Development agreements work for highway commercial uses.** The County approved each project through a development agreement, as Shelburne can under its Special Planning Area.
- **Serviced lots draw operators.** Beech Hill's full municipal servicing and flexible lots make it straightforward for operators to commit.
- **A hotel, fuel stop, and restaurants can grow side by side** at one exit.
- **A First Nation partner can lead a travel centre,** as Paqtnkek did with Bayside.

> Relevance to the 103 Property
>
> Antigonish County shows that a rural Nova Scotia municipality can attract a branded hotel, fuel, and food at its highway exits using development agreements and serviced land. It supports the 103 Property's phased, mixed-use approach and the option of a First Nation joint venture for the highway stop.

7.13 Financial Tools for Attracting Investors

Infrastructure, servicing, and transit costs are rising across Canada. The case studies, interviews, and research identified the most common financial incentives used to attract investors, which are especially helpful for smaller municipalities with limited capital capacity.

Table 36: Financial tools for attracting investors

Tool	How it works
Tax Increment Equivalent Grant (TIEG)	Shares a portion of the new property taxes generated by a completed development with the developer for a limited period, where criteria are met (for example, a defined increase in property value, affordable housing, or cultural activities).
Development Charge Abatement	Offsets or defers development charges (roads and transportation, stormwater, fire and emergency) to support development and redevelopment.
Municipal Fee Programs	Offset planning application, building permit, and development charge costs (site plan approvals, permits, zoning amendments) through a rebate or grant.

Tool	How it works
Employment Creation Incentive	An incentive tied to a minimum number of net new jobs, typically delivered as a TIEG.
Cost sharing	The municipality shares the cost of servicing or road works with the developer where they benefit the broader community, as in Windsor.
Phased taxation	Instead of a tax bill jumping to its full new amount when assessed value increases, the increase is phased in over a set number of years. Similar to a TIEG, but tax is reduced at source rather than rebated.

7.14 Key Lessons for Investment Readiness from the Case Studies

- **Strategic location alone does not make a project investment-ready.** Successful projects combined market demand, population or employment growth, regional transportation access, and provincial policy.
- **Market evidence should drive the type of development,** rather than a predetermined land use.
- **Phased implementation often determines success** for large developments, by reducing financial risk.
- **Infrastructure is the biggest determinant of feasibility.** Integrate infrastructure planning into development plans from the start.
- **Base decisions on integrated technical, economic, market, environmental, and community analyses.**
- **Collaboration is essential,** with the community, planners, developers, and other levels of government.
- **Start investment attraction with local conversations, not broad marketing.**
- **Direct highway access helps highway-oriented services,** and securing it and advance signage are provincial decisions. Where it is not available, clear advance signage and an easy local-road route can still support a smaller-format stop.
- **Highway services are most investable as a complete, operator-ready site.**

Implications for the 103 Property

Taken together, these lessons indicate that the choice of land uses for the 103 Property should follow evidence of demand and be sequenced by servicing and highway access readiness, with phasing used to reduce risk. Direct highway access would strengthen the highway-facing uses, but the site can be developed from Pells Road and Woodlawn Drive if it is not approved. Uses that private operators can deliver on their own are likely to move faster than uses that depend on a provincial or institutional partner.

08 Future Growth Drivers

8.1 Highway Stop / Rest Area with EV Charging (Tier 1, Priority 1)
8.2 Highway Commercial / Retail Cluster (Tier 2, Priority 2)
8.3 Regional Health & Specialist Centre (Tier 2, Priority 3)
8.4 Micro-Hotel / Limited-Service Hotel (Conditional)
8.5 Commercial Anchor Matrix
8.6 How the Roadmap Anchors Compare with This Report

ASBB



Inshore fishing fleet

This section identifies the four commercial anchors recommended for the 103 Property, drawing on the community engagements, market research, community, economic and consumer profiles, gaps analysis, the Internal Market Gap Report, and the jurisdictional scan. Each anchor responds to a specific community or market gap, and each is a land use that the jurisdictional scan shows can be delivered on highway-adjacent land.

The anchors were developed in two stages. The Highway 103 Commercial Development & Investment Roadmap (October 2026) tested three anchor concepts (a Regional Health & Specialist Centre, a Micro-Hotel / Limited-Service Hotel, and a Highway Commercial / Retail Anchor) and identified a fourth through market-gap research: a Highway Stop / Rest Area with EV Charging. The roadmap presents them in the order they were tested, not in priority order. This report carries all four forward and sets their priority using the decision-making matrix in Section 9. Section 8.5 sets out the full market and development case for each anchor, and Section 8.6 compares the roadmap's anchors with this report.

The anchors are presented in the agreed order. Tier 1 is the highway commercial and EV travel stop, the primary anchor and the most immediate and realistic opportunity. Tier 2 comprises the retail and commercial cluster (Priority 2) and the health/medical centre (Priority 3), the latter a longer-term and more difficult opportunity. The micro-hotel is a conditional opportunity rather than a standalone anchor.

Community input was a valuable and necessary part of shaping this section, but it was not the sole basis for the anchors selected or their order. Community priorities were weighed alongside market research, demographic and economic profiling, the gaps analysis, and the jurisdictional scan. The order also reflects how realistic each anchor is to deliver and how much control the Municipality has over its timing.

Table 37: Anchor selection criteria

Criteria	Highway Stop / Rest Area with EV Charging (Tier 1)	Highway Commercial / Retail Cluster (Tier 2)	Regional Health & Specialist Centre (Tier 2, longer-term)	Micro-Hotel (Conditional)
Community priorities (WWHR)	Residents and businesses identified limited local services; a travel stop adds convenience retail, food, fuel, and EV charging.	Residents identified limited commercial and retail space as a priority.	Residents travel outside Shelburne for healthcare, and 55.9% rate local access as poor.	Tourism that maintains community character, charm, and culture was identified as a growth area.

Criteria	Highway Stop / Rest Area with EV Charging (Tier 1)	Highway Commercial / Retail Cluster (Tier 2)	Regional Health & Specialist Centre (Tier 2, longer-term)	Micro-Hotel (Conditional)
Shelburne strategic plans	Supports tourism and economic growth goals by serving visitors passing through.	Municipal objectives include expanding the commercial tax base and promoting growth.	Local healthcare services and workforce attraction are priorities.	The Shelburne Town Council Strategic Plan 2024–2028 calls for using tourism assets to generate revenue.
Provincial priorities	The Clean Power Plan targets 80% clean electricity by 2030, supporting EV charging. Highway access is a provincial matter and is not in the current five-year highway plan.	Supports provincial tourism and destination development.	The Province is investing in recruiting physicians, nurse practitioners, and family practice nurses, and aims to build 5,700 new and replacement long-term care spaces by 2032.	Provincial initiatives promote destination development and tourism diversification.
Market demand	✔ Gasoline $13.5M, restaurants $11.0M, recreational vehicles $4.5M. Nova Scotia Power's fast-charging network lists no site between Liverpool and Yarmouth.	✔	✔ Demand is evident, but delivery depends on a provincial partner.	Conditional on demonstrated demand (180,000+ direct overnight stops per year in the region).
Shelburne's competitive advantage	Highway frontage at Exits 25 and 26, with traffic that does not depend on Shelburne's own trade area.	Highway frontage on undeveloped land that can be planned comprehensively.	Roseway Hospital as an existing anchor, and ongoing physician recruitment initiatives.	Highway location draws travellers, with harbour and heritage assets nearby.
Economic impact	Creates jobs, generates off-season revenue, and adds to the commercial tax base.	Broadens the commercial tax base and creates local jobs.	Year-round, high-quality employment; attracts skilled professionals.	Creates jobs; longer stays generate more tourism spending.

8.1 Highway Stop / Rest Area with EV Charging (Tier 1, Priority 1)

Tier 1 · Priority 1

Highway Stop / Rest Area with EV Charging

The primary anchor and the most immediate, realistic opportunity.

The highway commercial and EV travel stop is a service stop that combines fuel, convenience retail, quick-service food, DC fast charging, and parking for cars, RVs, and trucks. The region sees over 180,000 direct overnight stops per year, and market research identified spending on gasoline ($13.5M), restaurants ($11.0M), and recreational vehicles ($4.5M).

The Internal Market Gap Report found two clear service gaps on this stretch of Highway 103. Nova Scotia Power's fast-charging network lists sites in Liverpool and Yarmouth but none in between, and Shelburne's only national quick-service brands are a Tim Hortons and a Subway, both in town. The Caledon case study shows how a hotel can complement an existing fuel station and convenience store, with the commercial uses generating revenue during tourism off-seasons, and the High River case study shows a highway-side commercial centre that was feasible but required infrastructure financing.

Land use planning. The frontage at Exits 25 and 26 suits a travel stop that serves Highway 103 traffic whether or not travellers are visiting Shelburne. The first phase could include:

- A fuel and convenience operator, such as Irving Oil/Circle K, Petro-Canada, or a similar established brand.
- A DC fast-charging hub, consistent with the Clean Power Plan target of 80% clean electricity by 2030, with provincial and federal EV infrastructure support explored.
- One or two quick-service restaurants, such as A&W, Mary Brown's, or Dairy Queen.
- Truck and RV parking and charging, with washrooms, a rest area, and visitor information.

Indicative program. The roadmap suggests an 8,000–12,000 sq ft building (washrooms, three to four food units, convenience retail, and visitor information), an 8- to 12-pump fuel canopy with a truck lane, EV charging, and 30 to 50 truck and RV parking spaces, with a tall highway sign of the kind Glooscap Landing used to identify its site to travellers. Locating fuel and truck traffic on the highway-facing lands also keeps it off Woodlawn Drive. Existing fuel, food, and RV stops along Highway 103 have not yet been inventoried, so the service gap needs to be verified before the format is fixed.



Example of the format: a fuel canopy and convenience store with a quick-service drive-thru on one site.

Highway access. The 103 Property does not currently have direct access to Highway 103, and nothing near Shelburne appears in the Province's five-year highway improvement plan. Direct access would let the stop function as a true rest stop and capture more passing traffic, so the Municipality should pursue it with the Province. It is not a precondition: the stop can be developed with access from Pells Road or Woodlawn Drive, supported by advance signage several kilometres before the exit in each direction, and sized for that access first. Servicing and the access approach need to be confirmed before this anchor is advanced, and the anchor would be approved through a development agreement under the Special Planning Area (Recommendations 02, 03, and 04).

8.2 Highway Commercial / Retail Cluster (Tier 2, Priority 2)



Example of the format: DC fast chargers

Tier 2 · Priority 2

Highway Commercial / Retail Cluster

Small-format retail that reinforces the travel stop.

Residents and businesses identified limited commercial and retail space as a priority, and market research identified spending in categories such as restaurants ($11.0M) that is not being fully captured locally. Shelburne's trade area is small (about 9,595 residents) compared with Yarmouth (37,695), Queens (12,644), and Bridgewater (71,078), so commercial and retail space on the 103 Property should rely on traveller as well as resident demand and complement rather than compete with existing local commercial areas. Glooscap Landing and High River show highway-adjacent commercial development led by demonstrated gaps, delivered in phases, and dependent on infrastructure funding; Bridgewater shows that retail follows demand and that a clear target-tenant list increases investor confidence.

The roadmap compared Shelburne with Yarmouth, Liverpool/Queens, Antigonish, and similar communities across larger-format retail, service commercial, automotive, building supply, food, and other formats. Its target formats are small-format grocery, hardware and home improvement, fuel and convenience, restaurants, and financial services, where about 53% of residents rated local services poor. It suggests a first phase of 8 to 12 acres, with room to grow toward the 24.8-acre scale of Glooscap Landing.

Land use planning. The retail component should be a cohesive cluster that reinforces the travel stop. Value-oriented, small-format retail such as Dollarama or a similar retailer is a plausible fit, because neither Dollarama nor Giant Tiger currently has a store in Shelburne County. Other formats to test are a small-format grocery (Sobeys or Co-op), building supply (Home Hardware or Kent, noting Home Hardware already operates on Water Street), and a bank or credit union branch or shared financial services kiosk. Large-format retail is not realistic, because Yarmouth and Bridgewater already serve the region, and retail that duplicates downtown should be avoided. This anchor follows the travel stop, whose traffic supports it, and should be sized against tenant demand testing (Recommendation 06). Any development the Town is planning around Exit 26 should be acknowledged and coordinated with.

8.3 Regional Health & Specialist Centre (Tier 2, Priority 3)



Market day on the historic waterfront

Tier 2 · Priority 3

Regional Health & Specialist Centre

A real need, but a longer-term opportunity that depends on a provincial partner.

The roadmap frames this anchor as a commercial health centre combining provincially funded and private services: specialist outreach, primary care, diagnostics, physiotherapy and rehabilitation, pharmacy, dental, and allied health, on approximately 2 to 4 acres.

Shelburne's population is aging: seniors make up the largest share (28.57%), and county households spend $16.0 million a year on health care. Roseway Hospital serves approximately 15,000 Shelburne County residents; roadmap research reports low bed capacity, frequent temporary emergency department closures, and ultrasound available only one to two days a week, and residents travel to Yarmouth Regional Hospital (serving about 58,000 people across three counties) and Bridgewater for specialists, diagnostics, and rehabilitation. Residents travel outside Shelburne for healthcare and specialist services and rated local access poorly (55.9% poor, 38.2% fair, 5.9% good). Options for seniors are limited, including care facilities, walk-in clinics, and retirement homes, and the need will increase as the population ages.

The Province is investing in recruiting and retaining family physicians, nurse practitioners, and family practice nurses, and plans to build 5,700 new and replacement long-term care spaces by 2032. Nova Scotia Health's Strategic Plan also calls for more local decision-making.

A health centre needs a committed provider, operator, or institutional partner, and alignment with Nova Scotia Health's service planning, before it can proceed; major healthcare infrastructure is typically tied to the Province's capital planning. This report does not assume that a major private medical development can be attracted, and the health centre follows the privately delivered anchors unless a partner commits early (Recommendation 07).

Land use planning. A health centre would build on existing assets, including Roseway Hospital, rather than replace them. As a destination use that does not depend on highway visibility, it is better suited to Woodlawn Drive and/or the area near the municipal offices, subject to land availability and suitability. A clustered approach integrating primary care, diagnostics, rehabilitation, seniors' care, and supporting businesses would improve coordination and help attract professionals. A later phase could include a community health clinic, pharmacies, space for visiting specialists, diagnostics, and rehabilitation, and seniors' care services, with long-term care as a later-phase option dependent on provincial planning.

Comparable models. The Antigonish Community Health Clinic (Nova Scotia Health, 2026) has 36 clinic rooms, more than 30 professionals, and over 10,000 patients, located beside a pharmacy and Access Nova Scotia. The Bridgewater and Area Family Health Centre was delivered

as an addition to the Medical Arts Building on Glen Allen Drive. Millbrook First Nation is planning a facility with Nova Scotia Health and its regional economic development partnership combining collaborative practice, urgent care, a chronic disease clinic, and blood collection.

Potential partners and tenants. Nova Scotia Health's Western Zone (specialist outreach, lab collection, diagnostics); private tenants such as pharmacy (TLC Pharmasave in Shelburne already runs a pharmacy primary care clinic), physiotherapy and rehabilitation, dental, optometry, and audiology; and build-to-suit developers able to meet healthcare requirements. The recommended first step is to engage Nova Scotia Health's Western Zone and the Shelburne Community Partners committee while collecting letters of interest from private tenants. Once established, the centre could unlock a seniors' living campus and housing for healthcare workers on the Woodlawn Drive lands.

8.4 Micro-Hotel / Limited-Service Hotel (Conditional)

Conditional

Micro-Hotel

Proceeds only if demand is demonstrated.

Tourism is a key industry in Shelburne with potential to grow, building on natural beauty, beaches, the harbour, lighthouses, and seafood and fishing culture. The region is part of the South Shore tourism area and the Lighthouse Route, and sees over 180,000 direct overnight stops per year, not counting same-day visits.

Market research identified traveller accommodation as a $2.3M spending category, and Bridgewater's study supports a 20- to 40-room boutique hotel with 66% annual occupancy, above the 65% benchmark. These figures benchmark the scale of a hotel in Shelburne but do not by themselves prove demand at the 103 Property, and seasonality is a risk. The roadmap tested a limited-service hotel of 25 to 50 rooms, supported by tourism, highway traffic, business travel, and contractors; the Bridgewater benchmark suggests the lower end of that range is more realistic. Potential partners include Atlantic Canadian franchisees of limited-service brands (Hampton, Holiday Inn Express, Comfort Inn, Best Western), brands already in the catchment (Tru by Hilton, Best Western Plus, Rodd), and local motel and inn owners. Because the site is within the Special Planning Area, a hotel can be considered by Council through a development agreement, without rezoning.

Land use planning. As in Caledon, a micro-hotel would give visitors a place to stay overnight, and because the site is by the highway it would draw travellers across Nova Scotia rather than depending only on those visiting Shelburne. It should proceed only if demand is demonstrated, most likely during the commercial and retail phase (Phase 2), and should fit visually and functionally with the travel stop.



Coastal beach at sunset



Sandy Point Lighthouse

8.5 Commercial Anchor Matrix

The matrix below brings together the market case (Part A) and the development case (Part B) for each anchor, drawing on the Highway 103 Commercial Development & Investment Roadmap and this report's analysis. Anchors are shown in this report's priority order. "Highway-facing lands" refers to the frontage near Exits 25 and 26.

Table 38: Anchor matrix, Part A — market case

	Highway Stop / Rest Area with EV Charging	Highway Commercial / Retail	Regional Health & Specialist Centre	Micro-Hotel / Limited-Service Hotel
Market gap	Shelburne sits at the midpoint of the Bridgewater–Yarmouth stretch, the one gap in Nova Scotia's one-hour highway hub pattern. No NS Power fast-charging site between Liverpool and Yarmouth. Existing highway fuel, food, and RV stops still need to be inventoried.	About 85% regularly leave for services and 56% leave mainly to shop; 28% say retail and amenities are missing; about 53% rate financial services poor.	Only 5.9% rate healthcare access good (55.9% poor). Residents travel to Yarmouth and Bridgewater for specialists, diagnostics, and rehab; Roseway Hospital has limited capacity and intermittent ER closures.	Only 4 hotels/motels and 4 inns, versus 61 cottages and 71 Airbnb listings, and no branded hotel, while Yarmouth and Queens have several.
Evidence of demand	$13.5M gasoline, $11.0M restaurants, and $4.5M recreational vehicles a year in the county; 180,000+ direct overnight stops in the region. Fuel and convenience earn off-season revenue.	$374.1M household consumption ($53,873 per household), including food $61.4M, gasoline $13.5M, clothing $14.0M.	$16.0M a year in household health care spending; 28.57% of the population is 65+.	180,000+ direct overnight stops a year; $2.3M traveller accommodation spending in the county.
Regional catchment	Highway 103 through-traffic, South Shore and Lighthouse Route tourists, truckers serving the Industrial Park and marine terminal, business travellers, and local drivers.	Retail trade area of about 9,595 (6,131 primary, 484 secondary, 2,980 tertiary), plus highway customers.	Roseway serves about 15,000 county residents; Yarmouth Regional serves about 58,000 across three counties.	Highway through-traffic at the Bridgewater–Yarmouth midpoint, tourists, and workers and contractors; demand does not rely only on visitors to Shelburne.
Comparables	Glooscap Landing, Exit 8A (24.8 acres, fuel, restaurants, tall sign); High River, AB (travel centre, RV campground); ONroute (Section 7.11) as a design model.	Bridgewater Exit 12A (125 acres, light industrial and compatible large-format retail); Glooscap Landing; High River.	Antigonish Community Health Clinic; Bridgewater and Area Family Health Centre; Millbrook First Nation planned facility.	Caledon, ON (five-storey hotel beside a fuel station, 1.05 ha); Bridgewater boutique hotel (20–40 rooms).

Table 39: Anchor matrix, Part B — development case

	Highway Stop / Rest Area with EV Charging	Highway Commercial / Retail	Regional Health & Specialist Centre	Micro-Hotel / Limited-Service Hotel
Approximate size	8,000–12,000 sq ft building (washrooms, 3–4 food units, convenience, visitor information); 8–12 pump canopy with truck lane; EV charging; 30–50 truck and RV spaces. First pod of about 20–25 acres including circulation and buffers.	8–12 acres for a first phase, growing toward Glooscap's 24.8-acre scale, built parcel by parcel.	About 2–4 acres for a clinic, pharmacy, specialist space, and parking.	25–50 rooms tested; Bridgewater benchmark points to the lower end. About 2–3 acres reserved.
Land requirement and model	To be confirmed.	To be confirmed.	To be confirmed.	To be confirmed.
Location	Highway-facing lands	Highway-facing lands	Woodlawn Drive	Highway-facing lands, alongside the travel stop
Why this location	Relies on visibility, signage, and easy on/off access; keeps fuel and truck traffic off Woodlawn Drive.	Retail does best when visible, accessible, and near travel routes and other services.	Easy access from the highway for patients from Queens, Barrington, and Shelburne, and for emergency vehicles; does not need frontage.	Passing travellers reduce the risk of relying purely on tourism.
Access and servicing	Direct highway access preferred; otherwise a short, well-signed route from Pells Road or Woodlawn Drive; truck turning room, tall signage, water, sewer or a large on-site system, power for charging, stormwater; fuel storage and provincial access approvals.	Internal road network, shared servicing, and stormwater; servicing was the main constraint at Glooscap and High River.	Water, power, and sewage servicing; approval through a development agreement under the Special Planning Area.	Highway access, signage, turning lanes; water, sewer, power, stormwater. Caledon worked because servicing already existed.
Potential operators and investors	Irving/Circle K, Ultramar, Petro-Canada, Co-op, Wilsons, Parkland; Tim Hortons, A&W, Mary Brown's, Dairy Queen, McDonald's; NS Power, Tesla, FLO; a private RV-park operator; a First Nation development corporation as landowner-partner.	Dollarama, Giant Tiger; Sobeys or Co-op (small grocery); Home Hardware or Kent; a bank or credit union; developers active in Shelburne, Yarmouth, and Bridgewater.	Nova Scotia Health Western Zone; pharmacy, physio, dental, optometry, audiology tenants; build-to-suit healthcare developers.	Franchisees of Hampton, Holiday Inn Express, Comfort Inn, Best Western; Choice and Wyndham brands; local motel and inn owners.
Complementary businesses	Micro-hotel, farmers' market or local-products stall, RV campground, visitor information promoting the waterfront and heritage.	Fuel and convenience, family and quick-service restaurants, grocery, pharmacy.	Pharmacy, physio, dental, optometry, medical supply and home care, lab collection, café, seniors' living.	Fuel and convenience, restaurants, services for contractors and business travellers.

	Highway Stop / Rest Area with EV Charging	Highway Commercial / Retail	Regional Health & Specialist Centre	Micro-Hotel / Limited-Service Hotel
What it could unlock	Draws travellers into the node so retail and a hotel can follow; earns off-season revenue; promotes Shelburne to passing traffic; opens the Woodlawn Drive lands behind it.	Recaptures spending currently leaking to other trade areas.	A seniors' living campus, housing for healthcare workers, overnight hotel demand, and daily traffic for food and convenience.	Longer stays and more visitor spending; a second customer base for food and fuel; less short-term-rental pressure on housing.
Key constraints	Direct highway access is preferred but not required (local-road access from Pells Road or Woodlawn Drive is possible); servicing and infrastructure funding; seasonal volumes; entry-level workforce; possible pull from in-town businesses.	Small trade area, slow growth (+3.7% in ten years), dispersed customers, risk of drawing trade from downtown.	Nova Scotia Health controls publicly funded services and timing; competition with Roseway Hospital; specialist recruitment; servicing.	Seasonality; demand not yet demonstrated.
Next step	Obtain traffic counts for Exits 24–27 and inventory existing highway services; commission a Glooscap-style concept plan with three funding scenarios; hold local-first talks with fuel and franchise operators; seek infrastructure funding.	Measure spending leakage by category, build a named target-tenant list, and hold local-first talks with active regional developers.	Engage NS Health Western Zone and the Shelburne Community Partners committee; collect letters of interest from private tenants; then approach build-to-suit developers.	Commission a hotel feasibility study (need, competition, visitor demand), then seek investors and developers.

8.6 How the Roadmap Anchors Compare with This Report



Historic waterfront buildings, Shelburne Harbour

Table 40: Comparison of roadmap anchors with this report

Roadmap anchor	Position in this report	What the roadmap adds	How it has been integrated
Anchor 4: Highway Stop / Rest Area with EV Charging (analyst-identified)	Tier 1 / Priority 1, Phase 1	Building program (8,000–12,000 sq ft, 8–12 pumps, 30–50 truck/RV spaces), tall sign, RV-park operator, landowner-partner model, need to inventory existing highway services.	Program and constraints added to Section 8.1 and the matrix; services inventory added to Recommendation 05.
Anchor 3: Highway Commercial / Retail	Tier 2 / Priority 2, Phase 2	Wider format list (small grocery, building supply, financial services), 8–12 acre first phase, Antigonish as a comparison community.	Formats and sizing added to Section 8.2 and Recommendation 06; financial services added as a target.
Anchor 1: Regional Health & Specialist Centre	Tier 2 / Priority 3, Phase 3 (longer-term)	Public–private model, 2–4 acres, Roseway capacity evidence, Antigonish, Bridgewater, and Millbrook comparables, private tenant list, Western Zone and Community Partners engagement.	Added to Section 8.3 and Recommendation 07. Priority unchanged because delivery depends on a provincial partner.
Anchor 2: Micro-Hotel / Limited-Service Hotel	Conditional, Phase 2 if demand is proven	25–50 room range, named limited-service brands.	Added to Section 8.4; hotel feasibility study already in Recommendation 06.
Location labels	The roadmap labels the highway-facing lands "Exit 12."	—	The 103 Property is between Exits 25 and 26 (Exit 12 is in Bridgewater), so this report uses "highway-facing lands at Exits 25–26."
Zoning	The roadmap reported RES zoning on both parcels.	—	Corrected: the lands are within a Special Planning Area, so every anchor can be considered by Council through a development agreement and no rezoning is required (Section 3.3).

09 Opportunity Assessment

9.1 Highway 103 Commercial Anchors
9.2 Decision-Making Matrix

ASBB



Coastal landscape of the Municipality

9.1 Highway 103 Commercial Anchors



Shelburne's harbour front in autumn

ASBB's final recommendation for the 103 Property is a set of commercial anchors along Highway 103, delivered in three phases and led by a highway commercial and EV travel stop.

Table 41: Anchor hierarchy and phasing for the 103 Property

Priority	Anchor	Phase	Where
Tier 1 / Priority 1	Highway Stop / Rest Area with EV Charging (primary anchor)	Phase 1	Highway 103-facing lands
Tier 2 / Priority 2	Highway Commercial / Retail Cluster	Phase 2	Highway 103-facing lands
Tier 2 / Priority 3	Regional Health & Specialist Centre (longer-term)	Phase 3	Woodlawn Drive and/or near the municipal offices
Conditional	Micro-Hotel (only if demand is proven)	Phase 2, if demand is proven	Alongside the travel stop

The anchors respond to gaps identified across the market research, community engagement, and jurisdictional scan, and use the property's main strength: highway frontage at Exits 25 and 26 in a region that sees more than 180,000 direct overnight stops per year. The travel stop and EV charging hub address a visible highway service gap and serve traffic that does not depend on Shelburne's own trade area. The retail cluster reinforces it and captures spending not currently captured locally. The health/medical centre addresses a documented local gap but is a longer-term opportunity. Together they are more resilient than a single use, because they draw on both resident and traveller demand.

The sequence also reflects which anchors are realistic to deliver soonest and how much control the Municipality has over timing. The Highway 103-facing lands should host highway commercial uses, and the Woodlawn Drive and municipal-office area should host health/medical and other less highway-dependent uses, so that the two areas function together as one commercial node.

The 103 Property does not yet have direct highway access. This is a risk for the highest-priority anchor, because a stop reached from Pells Road or Woodlawn Drive will capture less passing traffic than one reached directly from the highway, but it does not prevent development. The Municipality should pursue direct access and advance signage with the Province, design the first phase to work from the local roads, and preserve land and layout options for future ramps (Section 10.3). The anchors create year-round jobs, broaden the commercial tax base, and strengthen local services, supporting the retention of residents and workers.

Housing is not recommended as an anchor for the 103 Property. The Municipality is advancing its own mixed-use plan, and the housing evidence in this report is retained as context for workforce and service needs.

9.2 Decision-Making Matrix

The decision-making matrix assesses each anchor against five weighted criteria reflecting the key considerations identified throughout the market analysis, site assessment, jurisdictional scan, and engagement. Strategic fit carries the most weight (25%), as the anchors must contribute to longer-term growth objectives and complement other municipal assets. Public and stakeholder alignment, demonstrated market need, and economic impact are each weighted 20%. Site suitability is weighted 15%, recognizing that some site constraints can be addressed through future planning and infrastructure. The highway access constraint is reflected in the site suitability scores, and each anchor's deliverability and timing control in strategic fit.



Shelburne Harbour from the air

Table 42: Scoring rubric

Score	Meaning
9–10	Strong, unambiguous fit. The evidence directly and fully satisfies the criterion, with no material constraint.
7–8	Good fit with clear support, resting on secondary or indirect indicators rather than a direct gap.
5–6	Moderate fit with real constraints: positive evidence offset by a concrete regulatory, financial, or structural barrier.
1–4	Weak or unsupported fit. Evidence is largely absent or contradicted.



Weighted totals out of 10. Scores are one input to the priority order and do not set it by themselves.

Table 43: Decision-making matrix

Highway Stop / Rest Area with EV Charging

7.4
weighted total / 10

Criterion	Evidence	Score
Public and stakeholder engagement 20% weight	Residents and businesses identified limited local services as a barrier, and a travel stop would add convenience retail, food, fuel, and EV charging within the municipality.	6
Site suitability 15% weight	Highway frontage at Exits 25 and 26 is the property's main asset, and demand comes from Highway 103 traffic rather than Shelburne's trade area. There is no direct highway access today and none is in the Province's five-year plan, so the stop would initially be reached from Pells Road or Woodlawn Drive and capture less passing traffic; fuel, EV charging, and RV and truck circulation need space, servicing, and electrical capacity still to be confirmed. The Special Planning Area allows the use through a development agreement.	6
Demonstrated market need 20% weight	Spending on gasoline ($13.5M), restaurants ($11.0M), and recreational vehicles ($4.5M); over 180,000 direct overnight stops per year. No fast-charging site between Liverpool and Yarmouth, and Shelburne's only national quick-service brands are in town.	8
Economic impact and development 20% weight	Creates jobs, adds to the commercial tax base, and generates revenue in the tourism off-season, as in Caledon. EV charging positions the site for growing electric vehicle travel.	7
Strategic fit 25% weight	The most immediate and realistic anchor, deliverable by private operators with limited municipal capital, and it draws the traffic that supports the retail cluster and a possible hotel. Aligns with the Clean Power Plan. Direct highway access and advance signage would strengthen it, but it can proceed with local-road access.	9

Table 44: Decision-making matrix

Highway Commercial / Retail Cluster

6.9
weighted total / 10

Criterion	Evidence	Score
Public and stakeholder engagement 20% weight	Residents identified limited commercial and retail space as a priority, and businesses identified retail as an area of interest. Residents valued small-town character, so retail should be small-format and complement existing commercial areas.	7
Site suitability 15% weight	Highway frontage provides visibility, and undeveloped land can be planned comprehensively, as at Glooscap Landing and High River. Access and servicing are not yet confirmed; the Special Planning Area allows commercial and retail uses through a development agreement.	6
Demonstrated market need 20% weight	Restaurant spending ($11.0M) is not fully captured locally. The trade area is small (about 9,595), so retail relies on traveller as well as resident demand. Neither Dollarama nor Giant Tiger has a store in Shelburne County, but larger formats are served from Yarmouth and Bridgewater.	7
Economic impact and development 20% weight	Broadens the commercial tax base and creates local jobs. Glooscap Landing and High River both depended on infrastructure funding, so servicing costs affect the economic case.	7

Criterion	Evidence	Score
Strategic fit 25% weight	A cohesive cluster beside the travel stop reinforces the primary anchor. Because the trade area is small, retail is best phased in after the travel stop establishes traffic, and coordinated with any Town development around Exit 26.	7

Table 45: Decision-making matrix

Regional Health & Specialist Centre

7.0
weighted total / 10

Criterion	Evidence	Score
Public and stakeholder engagement 20% weight	Residents rated healthcare access poorly (55.9% poor, 38.2% fair, 5.9% good) and see it as critical for families and an aging population. Businesses said lacking healthcare providers makes the community less attractive; staff and Council see Roseway Hospital as an anchor.	9
Site suitability 15% weight	Does not depend on highway visibility, and there appears to be sufficient municipal land near Woodlawn Drive and the municipal offices, with direct local-road access. Servicing must be confirmed; a health use can be approved through a development agreement under the Special Planning Area; suitability ultimately depends on Nova Scotia Health's service planning.	6
Demonstrated market need 20% weight	Seniors are the largest population share (28.57%), and residents travel outside Shelburne for healthcare. The Province plans 5,700 long-term care spaces by 2032 and is investing in physician and nurse recruitment.	8
Economic impact and development 20% weight	Can create high-quality, year-round employment and attract skilled professionals, but is not viable in the short term without a committed partner and does not on its own solve recruitment.	6
Strategic fit 25% weight	Healthcare is a local and provincial priority, but a centre needs provincial alignment and funding, so the Municipality has less control over timing. A longer-term opportunity.	6

Table 46: Decision-making matrix

Micro-Hotel (Conditional)

6.2
weighted total / 10

Criterion	Evidence	Score
Public and stakeholder engagement 20% weight	Residents and businesses identified tourism as a growth area, with an emphasis on tourism that maintains community character. A small-format hotel is consistent with this.	7
Site suitability 15% weight	The highway location draws travellers passing through. In Caledon, a hotel was proposed on about 1.05 ha beside a fuel station. There is no direct highway access today, though a hotel can be reached from Pells Road or Woodlawn Drive and approved through a development agreement; the site lacks the waterfront access better suited to Hartz Point.	6
Demonstrated market need 20% weight	180,000+ direct overnight stops per year; traveller accommodation is a $2.3M spending category; Bridgewater supports a 20- to 40-room boutique hotel at 66% occupancy. These are benchmarks, not proof of demand at the site.	6

Criterion	Evidence	Score
Economic impact and development 20% weight	Creates jobs and increases tourism spending, but a micro-hotel is small by design and demand is seasonal, partly offset by pairing with the travel stop.	6
Strategic fit 25% weight	Supported by the Town Council Strategic Plan 2024–2028 and provincial tourism priorities. A conditional opportunity that could proceed during Phase 2 if demand is proven.	6

The anchors are all credible fits for the 103 Property, but they are not equally ready. The highway commercial and EV travel stop has the highest weighted total (7.4 out of 10), followed by the health/medical centre (7.0), the retail and commercial cluster (6.9), and the conditional micro-hotel (6.2). The weighted totals are one input to the priority order and do not set it by themselves.

The health/medical centre scores well on community support and market need, but it depends on a committed provider and provincial planning, so it is a longer-term, Priority 3 opportunity. The retail cluster is Priority 2 because it builds directly on the traffic the travel stop generates. The micro-hotel scores lowest because its demand is not yet demonstrated, which is why it is conditional. The scores reflect ASBB's preliminary assessment and should be reviewed with the Municipality; they also depend on servicing and on the outcome of the highway access request, which affects how much passing traffic the highway-facing uses can capture.

How the scores and tiers are read. Each anchor is rated 1 to 10 on each criterion, and the ratings are weighted and added to a score out of 10. For the highway stop, that is 9 × 25% + 6 × 20% + 8 × 20% + 7 × 20% + 6 × 15% = 7.4. A score of 9 to 10 is a strong fit, 7 to 8 a good fit, and 5 to 6 a fit with real constraints. Tiers reflect delivery as well as score: **Tier 1** is done first because private operators can start now; **Tier 2** follows Tier 1's traffic or needs a partner; **Conditional** proceeds only if demand is proven. The final rank is the score plus how soon the anchor can be delivered, which is why the health centre (7.0) follows the retail cluster (6.9).

10 Investment Readiness

10.1 Investment Readiness Framework
10.2 Developer Outreach
10.3 Highway Access, Signage, and Spatial Planning
10.4 Spatial Direction: One Mixed-Use Node, Three Parts

ASBB



Example of a highway service format

The purpose of an investment readiness framework is to provide a structured approach for assessing whether a municipality, community, or development site is prepared to attract, accommodate, and support private-sector investment. Municipalities do not directly deliver private investment, but they play a critical role in creating the conditions that enable it: ensuring lands are strategically planned, development barriers are identified and addressed, infrastructure and servicing requirements are understood, and approval processes are predictable and efficient.

This framework draws on investment readiness frameworks across Atlantic Canada and nationally, and on the feasibility metrics identified in the jurisdictional scan. For the 103 Property, two points are specific: the Special Planning Area already gives the Municipality a flexible approval route through development agreements, and the lead anchor benefits from highway visibility and access, which is currently by local road only. Sections 10.3 and 10.4 set out what readiness requires for access, signage, and spatial planning.

10.1 Investment Readiness Framework

Community profile

The community profile ensures that the investment a municipality attracts benefits the community and meets its needs, and serves as a baseline for what is missing. It draws on demographic, income, housing, population, consumer spending, and leakage data, complemented by surveys, focus groups, and interviews.

Table 47: Community profile indicators

Indicator	Key questions
Economic vision	What form of economic development would the community like to see: emerging sectors, technological innovation, infrastructure, or more?
Sector priorities	Have priority industries been identified based on local advantages and community preferences? Which new businesses can thrive in the local ecosystem, based on an analysis of existing goods, services, and supply chains?

Indicator	Key questions
Competitive advantage	What makes this location different from competing communities: workforce and talent, market demand, customer base, partnerships, and marketing resources?
Regional alignment	Does the opportunity align with regional and provincial strategies, and with the community's vision, culture, and history?
Market demand	Is there evidence of demand, through sector gaps, consumer spending and leakage, and underserved local markets?

Current industry profile and impact forecasting

This pillar evaluates the industries that exist in the Municipality and surrounding regions, and the growth drivers emerging across the province and Atlantic Canada, including provincial initiatives, new legislation, tourism and housing strategies, defence policy, and critical mineral discoveries. It assesses whether and how Shelburne can benefit, and identifies complementary industries and sectors.

Economic development capacity: market, workforce, and community

Table 48: Economic development capacity

Indicator	Key questions
Labour force	Are the required skills available locally for the identified industries? If not, is affordable local training available, and what talent attraction strategies are needed?
Population trends	Is the community growing?
Housing	Can workers be accommodated, and are housing and infrastructure planning aligned with investment and growth?
Training	Are education and training partners available, and are people willing to develop these skills?
Quality of place	Is the community attractive for employees?
Policies and programs	Which policies and programs encourage investment, and is the community aware of federal and provincial programs?
Inventory of local businesses	Is there an inventory of local businesses for site selectors and testimonials?
Streamlined economic development system	Is there a dedicated economic development contact, and a strategic plan updated in the last three to five years?

Investment attraction has increasingly shifted from attracting employers toward creating ecosystems that attract and retain talent, including housing, amenities, and quality of life.

Land use planning, infrastructure, and readiness

Table 49: Land use planning indicators

Indicator	Key questions
Ownership	Is ownership clear and development-ready?

Indicator	Key questions
Zoning and approvals	Do current planning tools allow the intended uses (for the 103 Property, through development agreements under the Special Planning Area), and is the approval process clear and published online?
Land inventory	Is there a database of available sites?
Development constraints	Are environmental, servicing, and regulatory constraints understood, including a water resource and wastewater study?
Expansion potential	Can the site accommodate future growth?
Fees	Is clear information on application fees, timing, and charges published?
Growth	Does the community have a growth plan?

Nova Scotia's economic development land-use guidance highlights that industrial areas should have supporting transportation and infrastructure capacity, particularly near major routes. For the 103 Property, transportation is an important readiness indicator: the parcels are near Exits 25 and 26 and reached from Pells Road and Woodlawn Drive, but lack direct highway access, and no access improvement near Shelburne is programmed by the Province.

Table 50: Infrastructure indicators

Indicator	Key questions
Transportation	Is the site connected to highways, ports, airports, rail, or transit?
Water / wastewater	Are servicing capacities sufficient?
Energy	Is adequate power available for intended uses?
Broadband	Is digital infrastructure available?
Future capacity	Can infrastructure expand with demand?

Investment planning toolkit: support, partnerships, and marketing

Table 51: Investment planning toolkit

Indicator	Key questions
Partnerships	Are government, business, and community partners aligned, including trade commission contacts and events?
Investor materials	Are site profiles and data, such as quarterly economic indicators and investment packages, readily available?
Lead management	Is there a process for responding to inquiries?
Promotion	Is there a clear investment brand, with strategies supporting trade diversification, export development, and cost-sharing?
Marketing	Is there a published investment marketing plan with proactive outreach, and marketing profiles for each target sector?

Indicator	Key questions
Collaboration	Are regional partners coordinated?



Shelburne's harbour front in autumn

10.2 Developer Outreach

This section sets out how the Municipality should actively find and secure operators and developers for the 103 Property, in the order of the anchor hierarchy. The jurisdictional scan identified three approaches: Moncton's proactive, relationship-first model; HRM's public-investment-as-catalyst model; and Windsor's incentive-led model for small municipalities with limited capital.

10.2.1 Community Vision Establishment

Windsor showed that settling community vision early, rather than negotiating it project by project, makes attracting developers easier. For the 103 Property, this means finalizing a vision statement drawing on what residents told the Municipality (a self-sufficient community with strong local services, growth that preserves small-town character and natural assets, desired amenities, and non-negotiables) and securing Council sign-off before any developer conversation begins.

10.2.2 Relationship Building

Moncton prioritizes local investors who already know and are committed to the market, with most attraction effort going to known local and regional developers. Because the anchors attract different operators, outreach should be organized by tier: fuel, EV charging, and quick-service operators first; retail operators once the travel stop is committed; and health partners on a longer timeline.

Table 52: Relationship-building action plan

Stage	Action	Rationale
1. Local-first conversations	Meet directly with developers already active in Shelburne, Yarmouth, Bridgewater, and the South Shore before releasing public marketing materials.	Familiarity and trust built locally move a project forward faster than broad marketing.
2. Regional expansion	Extend conversations to fuel, travel-centre, restaurant, and retail operators active elsewhere in Atlantic Canada with experience in comparable highway nodes.	Matches Moncton's local-first principle while building a wider pipeline.

Stage	Action	Rationale
3. Broad marketing	Publish investor-facing materials and register with Invest Nova Scotia's site inventory.	Broad marketing supplements, rather than replaces, relationship-based outreach.

10.2.3 De-Risking the Site Before Asking a Developer to Commit

HRM's experience shows that public investment builds developer confidence by reducing the risk borne by first movers. Shelburne need not replicate HRM's scale: completing the technical and servicing studies (Recommendation 03), securing written guidance on highway access (Recommendation 02), and assembling an investment-readiness dossier (Recommendation 04) is Shelburne's equivalent signal, telling operators the Municipality has absorbed the up-front risk and cost of due diligence.

10.2.4 Outreach Channels and Ongoing Relationship-Building

Relationship-building should be treated as long-term infrastructure. Moncton also treats labour and healthcare access as factors developers weigh nearly as heavily as land and financing, so Shelburne should address workforce-training partnerships proactively in developer conversations.

10.2.5 Industry Conferences and Forums

Adopting Moncton's approach to forums such as the Atlantic Real Estate Forum builds familiarity with Shelburne's vision before any solicitation is announced. Shelburne should prioritize Atlantic Canadian venues, attend consistently to build familiarity, and track contacts and follow-ups in the team's work plan, with one to two targeted regional events per year. Appendix B lists relevant events.

10.2.6 Anchor Operators and Partners

The operators and partners below are drawn from the Internal Market Gap Report. They are candidates for early conversations, not commitments or confirmed interest.

Table 53: Candidate operators and partners by anchor

Anchor	Candidate operators and partners	Why they are relevant
Tier 1: Fuel and convenience	Irving Oil/Circle K, Ultramar, Co-op, Wilsons Gas Stops, Petro-Canada (Suncor) dealers, Parkland (Esso/On the Run); a private RV-park operator	Established Atlantic fuel brands, some with travel-centre formats. The fuel operator makes the rest of the node viable.
Tier 1: DC fast charging	Nova Scotia Power, Tesla, FLO, the fuel operator's own network	Nova Scotia Power's 180 kW network lists sites in Liverpool and Yarmouth but none in between, the clearest highway service gap on the corridor.
Tier 1: Quick-service restaurants	A&W, Mary Brown's, Dairy Queen, McDonald's, the existing Shelburne Tim Hortons franchisee	Shelburne's only national quick-service brands are a Tim Hortons and a Subway, both in town. A second Tim Hortons would partly compete with the existing store, so its franchisee is a natural partner.
Tier 2: Retail and commercial	Dollarama, Giant Tiger, other small-format value retailers; Sobeys or Co-op (small-format grocery); Home Hardware or Kent; a bank or credit union; Crombie REIT	Neither Dollarama nor Giant Tiger has a store in Shelburne County. Giant Tiger already serves the area from Yarmouth, so a downtown or Ohio Road location may suit it better.
Conditional: Micro-hotel	Franchisees of Hampton, Holiday Inn Express, Comfort Inn, and Best Western; Choice Hotels, Wyndham; local motel and inn owners	These brands franchise in small Atlantic markets, but interest depends on demonstrated demand.

Anchor	Candidate operators and partners	Why they are relevant
Tier 2: Health/medical centre	Nova Scotia Health (Western Zone), Roseway Hospital, the Shelburne Community Partners committee; private tenants (pharmacy, physio, dental, optometry, audiology); build-to-suit healthcare developers	Proceeds only if the Province or Nova Scotia Health commits; private tenants can be lined up in parallel.
Joint-venture partners	First Nation development corporations such as Membertou and Glooscap	Proven developer-operators of highway fuel and quick-service nodes in Nova Scotia.

Contact details and each operator's site criteria (such as minimum population and traffic thresholds) have not yet been confirmed and should be gathered before outreach begins.

10.2.7 Development Structures

The roadmap does not assume the Municipality sells the entire property. Each anchor can use the structure that best fits its operator and the Municipality's need to retain control over phasing and future access.

Table 54: Development structures under consideration

Structure	How it works	Best suited to
Land sale	The Municipality sells a defined parcel, with conditions, phasing commitments, and a reacquisition clause (Recommendation 08).	Established operators that want to own their site, such as a fuel brand or retailer.
Ground lease	The Municipality keeps the land and leases it long term; the tenant builds and operates. ONroute used a long-term concession of this kind.	Uses where the Municipality wants long-term control and revenue, including the travel stop.
Build-to-suit	A developer builds a facility to a tenant's specification and leases it to them.	The health centre and specialized tenants.
Individual commercial parcels	The frontage is subdivided into serviced pads offered one at a time as demand appears.	The Phase 2 retail cluster and the hotel pad.
Partnership structures	The Municipality partners with a landowner-developer or community organization, as with the First Nation landowner-partner model at Glooscap Landing.	Joint ventures on the travel stop or the wider node.



Example of the format: a canopy-covered EV charging station

10.3 Highway Access, Signage, and Spatial Planning

Direct access to Highway 103 would strengthen the highway commercial component, and the 103 Property does not currently have it. Without it, some travellers will continue to the next stop rather than leave the highway and follow a local road, so the Municipality should pursue direct access with the Province. However, the property can still be developed with access from Pells Road or Woodlawn Drive. In that case, clear advance signage, a short and well-signed route from the exit, and a format sized to the traffic it can realistically capture become the priorities.

What is known. According to the Internal Market Gap Report, Exits 24 to 27 on Highway 103 are at-grade junctions rather than grade-separated interchanges; this comes from a secondary source and should be confirmed with Public Works. In an October 11, 2023 letter to the Minister of Public Works, Council raised serious concern about accidents at Exit 26 and urged a lower speed limit. Any plan that adds turning truck traffic at Exits 25 and 26 will need a provincial traffic impact study and may trigger intersection upgrades at the developer's or the Municipality's cost. Nothing for Shelburne appears in the Province's 2026–27 Five-Year Highway Improvement Plan other than repaving near Exit 30, so the Municipality should raise the request proactively.

What the Municipality should do.

- Engage the Province early on access, interchange, on-ramp and off-ramp requirements, and controlled-access considerations, before the site concept is finalized.
- Obtain mainline Highway 103 traffic volumes and truck share at Exits 24 to 27, and commission a traffic impact study for access at Exits 25 and 26.
- Explore whether the site can function as a natural commercial extension of the existing Sobeys and highway area.
- Request written guidance from Public Works on access permits, turning lanes, and service and pylon signage near a 100-series highway.

Advance signage. Signage on provincial highways is controlled by the Province. The Municipality should seek signs several kilometres before the site for traffic from each direction, so travellers can plan to stop for fuel, food, EV charging, and rest.

Preserving future access in the site layout. Even if direct access cannot be secured immediately, the concept must preserve the option. The layout should consider potential on-ramps and off-ramps, internal circulation, access points, and adequate right-of-way, and land needed for access should be reserved before any parcel is subdivided or sold.

Related development around Exit 26. The Town may already be planning development around Exit 26. This should be coordinated so that the 103 Property complements it rather than competing with it; the details have not yet been confirmed.

10.4 Spatial Direction: One Mixed-Use Node, Three Parts



Shelburne's harbour front in autumn

The Highway 103-facing lands and the Woodlawn Drive and municipal-office lands should ultimately function as one commercial node, while serving different market functions.

Table 55: Spatial direction for the 103 Property

Area	Intended uses	Why
Highway 103-facing lands	Fuel and convenience, EV charging, quick-service restaurants, truck and RV parking, complementary retail, and potentially the micro-hotel.	These uses depend on highway visibility, through traffic, and direct access.
Woodlawn Drive and municipal-office area	Health/medical uses and other development less dependent on highway visibility and access.	Destination uses, with apparently sufficient municipal land, subject to availability and suitability.

The highway lands draw traveller and pass-through demand. The Woodlawn Drive lands serve destination uses that residents and the wider region travel to, and add weekday traffic that supports the travel stop.

A mixed-use site, built in three nodes. This report recommends planning the whole property for mixed use, so each node can combine commercial, service, office, health, and community uses as demand grows. Under the Special Planning Area, this is done through development agreements, with no rezoning required. Mixed use keeps the site open: an office above a shop, or housing later on the Woodlawn Drive lands, can be approved without starting over.

Table 56: Three mixed-use nodes, each one starting the next

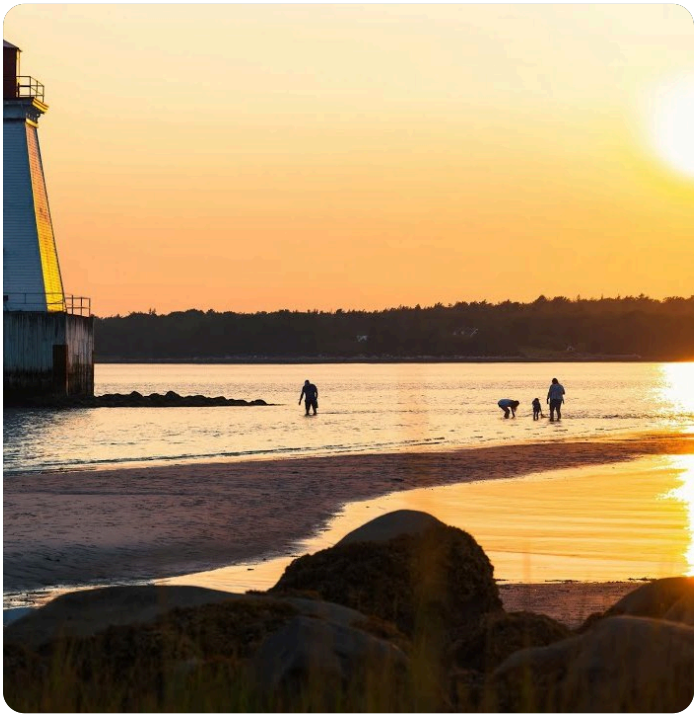
Node	Uses	What it passes on to the next node
Node 1: Highway gateway (Years 1–3)	Fuel, food, washrooms, EV charging, truck and RV parking, local products, visitor information	An access road, water, power, signs, steady customers, and real traffic and sales data
Node 2: Mixed-use cluster (Years 3–5)	Value stores, café, bank or credit union, professional offices above or beside shops, experiential tourism (tasting room, local food and artisan market, tour and outfitter hub), and a hotel pad if demand is proven	Extended services, a visible business address, and more visitors
Node 3: Health and community campus (Years 5–10)	Health centre, pharmacy, clinic space; later seniors' living and housing	Weekday visits that flow back to the shops and the stop

Experiential tourism in the mixed-use cluster. The cluster should also make room for experiential tourism: things travellers do, taste, and learn rather than just buy. Examples that fit Shelburne include a tasting room or outlet for local producers such as Boxing Rock and District 33; a local food and artisan market showcasing seafood, crafts, and makers; and a tour and outfitter hub that books harbour, beach, cycling, and kayak experiences and sends visitors on to Sandy Point, the historic waterfront, and the Black Loyalist Heritage Centre in Birchtown. These uses give highway travellers a reason to stay longer, extend the visitor season, and connect the 103 Property to Hartz Point and downtown rather than competing with them. They also align with provincial tourism priorities and could be tested early with seasonal pop-ups before permanent space is built.

Each phase builds what the next one needs. The first operator effectively brings the road and services in; later businesses share them, lowering their costs and risk. If a phase's trigger is not met, the next phase waits and its land stays reserved, so nothing is built ahead of demand.

11 Recommendations and Implementation

11.1 Next Steps
Recommendation 01: Confirm the Anchor Hierarchy, Phasing, and Spatial Plan for the 103 Property
Recommendation 02: Pursue Direct Highway Access, Plan for Local-Road Access, and Seek Advance Signage
Recommendation 03: Commission Outstanding Technical and Servicing Studies
Recommendation 04: Prepare a Development Agreement Framework and Make Investor-Facing Materials Readily Available
Recommendation 05: Deliver Phase 1: Highway Travel Stop and EV Charging
Recommendation 06: Build the Phase 2 Highway Commercial / Retail Cluster, and Test the Micro-Hotel
Recommendation 07: Explore the Phase 3 Regional Health & Specialist Centre Opportunity
Recommendation 08: Offer Incentives, Attract Operators, and Protect the Concept Through Land Disposition
ASBB



Sandy Point Lighthouse

11.1 Next Steps

The recommendations below follow the agreed anchor hierarchy and phasing. The highway travel stop with EV charging is the primary anchor and the most immediate and realistic opportunity. The retail and commercial cluster follows it, the health/medical centre is a longer-term opportunity, and the micro-hotel is a conditional opportunity alongside the highway commercial cluster.

Table 57: Anchor hierarchy for the 103 Property

Priority	Anchor and role	Evidence and conditions	Location
Tier 1 / Priority 1	Highway Stop / Rest Area with EV Charging (primary anchor)	A branded fuel and convenience stop, a DC fast-charging hub, one or two quick-service restaurants, truck and RV parking, and complementary highway-oriented uses. The strongest evidence is the highway service gap: no Nova Scotia Power fast-charging site between Liverpool and Yarmouth, and Shelburne's only national quick-service brands are in town. Stronger with direct highway access, but can proceed with access from Pells Road or Woodlawn Drive.	Highway 103-facing lands
Tier 2 / Priority 2	Highway Commercial / Retail Cluster	Value-oriented, complementary retail such as Dollarama or a similar small-format retailer, forming a cohesive cluster with the travel stop. Large-format retail is not realistic. Coordinate with development planned around Exit 26.	Highway 103-facing lands

Priority	Anchor and role	Evidence and conditions	Location
Tier 2 / Priority 3	Regional Health & Specialist Centre	A longer-term and more difficult anchor that depends on Nova Scotia Health or the Province committing, on partnerships, and on operator interest.	Woodlawn Drive and/or near the municipal offices
Conditional	Micro-Hotel	Not a standalone anchor or a guaranteed phase. Could proceed during Phase 2 if demand is demonstrated, and should fit visually and functionally with the travel stop.	Highway 103-facing lands, alongside the travel stop

Table 58: Proposed phasing for the 103 Property

Phase	Focus	Components	Conditions
Phase 1	Highway Travel Stop + EV Charging	Travel stop; fuel and convenience; DC fast charging; quick-service food; truck and RV parking.	Access approach confirmed (direct or local-road); development agreement approved; operators secured; EV incentives explored.
Phase 2	Commercial / Retail Expansion	Additional retail and commercial uses, such as Dollarama or a similar value retailer, building on Phase 1 traffic. The micro-hotel could be developed in this phase.	Demonstrated demand for retail and a hotel; Phase 1 operating.
Phase 3	Health / Medical Development	Health/medical centre opportunities, likely at Woodlawn Drive or the municipal-office area.	Longer-term; depends on partnerships, service demand, and operator interest.

01

Recommendation 01

Confirm the Anchor Hierarchy, Phasing, and Spatial Plan for the 103 Property

The Municipality and the commissioning team have agreed an anchor hierarchy and a three-phase approach. Recording these decisions, and the land allocation that follows from them, before external outreach begins ensures the Municipality goes to operators and partners with a clear and consistent position. The spatial plan should show how the Highway 103-facing lands (highway commercial) and the Woodlawn Drive lands (health/medical and other less highway-dependent uses) can function together as one commercial node.

Table 59: Actions — 1.1 Anchor hierarchy and land allocation (short term)

Priority	Action	Lead	Timing
High	Adopt the anchor hierarchy and three-phase approach as the Municipality's position, and document it as a short internal statement to guide all materials and conversations with operators.	Economic Development, Council	0–3 months
High	Prepare a concept-level spatial plan allocating uses between the Highway 103-facing lands and the Woodlawn Drive and municipal-office lands, reserving land for future highway access improvements (Recommendation 02).	Planning, Public Works	0–6 months

Priority	Action	Lead	Timing
High	Size a first-phase pod on the highway frontage. The Internal Market Gap Report suggests about 20 to 25 acres, including fuel and convenience, EV charging, one or two restaurants, truck and RV parking, internal roads, and buffers. Test it against the land available.	Planning, Economic Development	0–6 months
Medium	Confirm how the 103 Property concept relates to any development planned by the Town around Exit 26, so that the two complement each other.	CAO, Economic Development	0–6 months

Recommendation 02

02 Pursue Direct Highway Access, Plan for Local-Road Access, and Seek Advance Signage

Direct highway access would strengthen the primary anchor, and it is not currently in the Province's Five-Year Highway Improvement Plan, so the Municipality should lobby proactively for it. It is a risk to manage rather than a barrier: the property can be developed with access from Pells Road or Woodlawn Drive, so the site should be designed to work from those roads first while preserving room for direct access later. Signage several kilometres before the stop is important in either case.

Table 60: Actions — 2.1 Provincial engagement and access (short term)

Priority	Action	Lead	Timing
High	Request an early meeting with Nova Scotia Public Works to discuss direct access to Highway 103, including interchange, on-ramp and off-ramp requirements and controlled-access considerations, before the site concept is finalized.	CAO, Council, Public Works	0–3 months
High	Obtain Highway 103 mainline traffic volumes and truck share at Exits 24 to 27, including seasonal factors. These are the most important missing numbers for the travel stop.	Public Works	0–3 months
High	Commission a traffic impact study for access at Exits 25 and 26, and ask the Province to confirm requirements for access permits, turning lanes, and intersection upgrades, including who bears their cost.	Public Works, Engineering	3–9 months
Medium	Prepare an advocacy case, building on Council's October 2023 letter on safety at Exit 26, asking the Province to consider direct access in future highway improvement plans.	Council, CAO	3–9 months
High	Design the first phase to work with access from Pells Road and Woodlawn Drive, including the route from Exits 25 and 26, turning movements for trucks and RVs, and any local-road upgrades.	Planning, Public Works, Engineering	3–9 months
Medium	Explore whether the site can function as a natural commercial extension of the existing Sobeys and highway area.	Planning, Public Works	3–9 months

Table 61: Actions — 2.2 Advance signage (short term)

Priority	Action	Lead	Timing
High	Ask the Province for written guidance on tourism and service signage and on-premises pylon signs near a 100-series highway.	Public Works, Planning	0–6 months

Priority	Action	Lead	Timing
High	Request advance signage several kilometres before the site, for traffic from each direction, advertising fuel, food, EV charging, and rest area facilities.	Public Works, Economic Development	6–12 months
Medium	Agree signage and pylon requirements with prospective fuel operators early, since a highway-visible pylon is essential to the anchor.	Economic Development	6–12 months

Table 62: Actions — 2.3 Preserving future access in the site layout (short term)

Priority	Action	Lead	Timing
High	Engage planners and Public Works at the start of site design, so that the layout does not preclude future access improvements.	Planning, Public Works	0–3 months
High	Design the concept to include potential on-ramps and off-ramps, internal circulation, access points, and adequate right-of-way, and reserve this land before any parcel is subdivided or sold.	Planning, Engineering	3–9 months
Medium	Preserve the option of direct highway access even if it cannot be secured immediately, and carry this reservation into the disposition terms (Recommendation 08).	Planning, Legal	3–9 months

Recommendation 03

03 Commission Outstanding Technical and Servicing Studies

The 103 Property is undeveloped, with no confirmed on-site servicing and no site-specific flood, wetland, or coastal hazard determination. The jurisdictional scan identifies servicing and infrastructure cost as the single biggest determinant of feasibility. Fuel, EV charging, restaurant, retail, and clinical uses have different servicing needs, so the studies should be scoped to the anchor hierarchy. The Internal Market Gap Report suggests the first phase may be able to run on an on-site well and septic system or a package plant; this assumption should be confirmed with Nova Scotia Environment.

Table 63: Actions — 3.1 Technical due diligence (short term)

Priority	Action	Lead	Timing
High	Commission a geotechnical and soils assessment covering both parcels.	Public Works, Engineering	0–6 months
High	Commission a servicing capacity study confirming water, sewer, and power extension requirements, distances, and costs, including the electrical capacity needed for DC fast charging.	Public Works, Engineering	0–6 months
High	Commission a site-specific flood, wetland, and coastal hazard determination for both parcels against provincial mapping tools.	Planning, Engineering	0–6 months
Medium	Incorporate wildfire considerations into site design, including firebreaks and emergency access, given that Highway 103 was closed between Exits 27 and 30 during the 2023 Barrington Lake fire.	Planning, Engineering	3–9 months

Table 64: Actions — 3.2 Servicing feasibility and financing (short term)

Priority	Action	Lead	Timing
Medium	Obtain a concept-level engineering estimate comparing on-site well and septic or package plant servicing with a municipal water and sewer extension. Municipal extensions should be costed but not pre-built.	Public Works, Engineering	3–9 months
Medium	Complete a servicing and infrastructure feasibility study testing financing structures, including the developer-funded model in the MPS and municipal / private-developer cost-sharing partnerships.	Economic Development, Finance	3–9 months

Recommendation 04

04 Prepare a Development Agreement Framework and Make Investor-Facing Materials Readily Available

Readily available investor materials (a site profile, the planning approval route, and regulatory requirements) are a market-readiness indicator. The 103 Property is within a Special Planning Area, which allows Council to consider any type of development through a development agreement, so no rezoning or zoning confirmation is required. What operators need instead is a clear, published explanation of how a development agreement application will be considered, the terms Council is likely to expect, and how long the process takes.

Table 65: Actions — 4.1 Development agreement framework and regulatory package (short term)

Priority	Action	Lead	Timing
High	Prepare a development agreement framework for the 103 Property: the process under the Special Planning Area, the information applicants must submit, and standard terms for uses, layout, servicing, access, phasing, signage, and reacquisition.	Planning, Legal	0–6 months
High	Confirm with Council the anchor uses it is prepared to consider on each part of the site (fuel, EV charging, quick-service restaurants, retail, a hotel, and health uses), so operators know what proposals are welcome. The Internal Market Gap Report suggests a highway frontage pod of 20 to 30 acres.	Planning, Council	0–6 months
Medium	Compile a regulatory summary for operators: the Special Planning Area and development agreement process, public hearing requirements, site plan expectations, and other approvals (fuel storage, provincial access and signage).	Planning, Economic Development	0–3 months
Low	Publish the site profile and regulatory summary on the Municipality's investment webpage.	Economic Development, Communications	3–6 months

Publishing a site profile is necessary but not sufficient. Comparable jurisdictions treat investment readiness as a standing package (studies, a single point of contact, a clear approvals timeline, and visibility to provincial channels) that lets an operator underwrite the site without duplicating work.

Table 66: Actions — 4.2 Investment readiness (short term)

Priority	Action	Lead	Timing
High	Bundle the access guidance (Recommendation 02) and technical and servicing studies (Recommendation 03) into a single investment-readiness dossier.	Economic Development, Engineering	3–9 months
High	Designate a single point of contact within Economic Development for all 103 Property inquiries across planning approvals, servicing, access, and incentives.	Economic Development, CAO	0–3 months
Medium	Publish an indicative approvals timeline covering site plan review, servicing sign-off, and building permits.	Planning, Economic Development	3–6 months
Medium	Prepare a one-page summary for each anchor (market evidence, comparable projects, site fit) for the site profile.	Economic Development	3–6 months
Medium	Register the 103 Property with Invest Nova Scotia's site and property inventory.	Economic Development	3–6 months

Recommendation 05

05 Deliver Phase 1: Highway Travel Stop and EV Charging

Phase 1 is the most immediate and realistic opportunity. Nova Scotia Power's 180 kW fast-charging network lists sites in Liverpool and Yarmouth but none in between, leaving Shelburne at the midpoint of the longest uncovered stretch of Highway 103 (roughly 140 to 150 km, an estimate), and Shelburne's only national quick-service brands are in town. A branded fuel and convenience stop with a DC fast-charging hub, one or two quick-service restaurants, and truck and RV parking would address this gap. Several inputs remain to be confirmed, including mainline traffic at Exits 24 to 27, and the first phase should be sized to what that data supports. A full truck stop with showers, scales, and a full-service restaurant is not recommended until traffic and truck share are known.



Concept rendering: covered charging bays for heavy trucks, a later option once truck volumes are known.

Table 67: Actions — 5.1 Operators and format (medium term)

Priority	Action	Lead	Timing
High	Approach candidate fuel and convenience operators (Irving Oil/Circle K, Wilsons Gas Stops, Petro-Canada dealers, Parkland) with a site package once the access approach and servicing are clarified. Confirm first that no existing station at Exit 25 already captures this trade.	Economic Development, CAO	6–12 months
High	Approach quick-service operators about one or two drive-thru units, including brands absent from Shelburne (A&W, Mary Brown's, Dairy Queen, McDonald's) and the existing Tim Hortons franchisee.	Economic Development	6–12 months
High	Inventory existing fuel, food, EV charging, and RV services along Highway 103 between Liverpool and Yarmouth to verify the service gap before fixing the format.	Economic Development	0–6 months
Medium	Commission a Glooscap-style concept plan for the travel stop with three funding scenarios, testing an 8,000–12,000 sq ft building, 8–12 pumps with a truck lane, EV charging, and 30–50 truck and RV spaces.	Economic Development, Planning	6–12 months
Medium	Define truck and RV parking requirements (gravel first, with washrooms and a dump station), and ask Public Works whether a provincial rest-area or washroom partnership is possible.	Economic Development, Public Works	6–12 months
Medium	Explore a joint-venture model with First Nation development corporations that have developed highway nodes in Nova Scotia.	CAO, Economic Development	6–18 months

Table 68: Actions — 5.2 EV charging and funding (medium term)

Priority	Action	Lead	Timing
High	Approach Nova Scotia Power, Tesla, FLO, and the fuel operator's own network about a co-located DC fast-charging hub. The Internal Market Gap Report suggests 8 to 12 stalls.	Economic Development	6–12 months
High	Explore provincial and federal EV infrastructure support, including the federal Zero Emission Vehicle Infrastructure Program (ZEVIP), and confirm eligibility, timing, and requirements.	Economic Development, Finance	3–9 months
Medium	Confirm electrical capacity and utility upgrade costs for the charging hub (Recommendation 03).	Public Works, Engineering	3–9 months

Recommendation 06

06 Build the Phase 2 Highway Commercial / Retail Cluster, and Test the Micro-Hotel

Phase 2 builds on the traffic generated by Phase 1, aiming for a cohesive cluster rather than isolated developments. Most shopping trips residents make out of the county are for full-line discount, hardware, auto, and apparel formats already established in Yarmouth and Bridgewater, which would not rationally duplicate in Shelburne. Only small-format, value-oriented uses are plausible, and retail that duplicates downtown should be avoided, with apparel, gifts, and dining steered to Water Street.

Table 69: Actions — 6.1 Retail and commercial cluster (medium term)

Priority	Action	Lead	Timing
High	Identify the retail and commercial uses that fit beside the travel stop, and set out how each reinforces the others as a single cluster concept.	Economic Development, Planning	Medium term
High	Map any development the Town is planning around Exit 26, and confirm that the cluster complements it.	CAO, Economic Development	Medium term
Medium	Make inquiries to Dollarama and Giant Tiger real estate. Giant Tiger already serves the area from Yarmouth, so a downtown or Ohio Road location may suit it better than the highway site.	Economic Development	Medium term
Medium	Measure spending leakage by category and test interest from a small-format grocer (Sobeys or Co-op), building supply (Home Hardware or Kent), and a bank or credit union, given that about 53% of residents rate local financial services poor. Plan a first phase of about 8–12 acres.	Economic Development	Medium term
Low	Make a single inquiry to Canadian Tire real estate about a small-market store, without planning around it.	Economic Development	Medium term

The micro-hotel is a conditional opportunity. Seasonality is a key risk: traffic on Trunk 3 near Shelburne shows summer peaks 30% to 40% above the annual average, and the future of the Yarmouth–Bar Harbor ferry is uncertain, with the provincial contract expiring after the 2026 season.

Table 70: Actions — 6.2 Micro-hotel, conditional (medium term)

Priority	Action	Lead	Timing
High	Reserve a pad of about 2 to 3 acres for a hotel within the highway commercial cluster, without marketing it until demand is proven.	Planning, Economic Development	Medium term
High	Commission a hotel feasibility study using Tourism Nova Scotia room-night data, and test interest from local owner-operators.	Economic Development	Medium term
Medium	Set the trigger for proceeding during Phase 2 (demonstrated demand and an operator commitment), and require the design to fit with the travel stop.	Economic Development, Council	Medium term

Recommendation 07

07 Explore the Phase 3 Regional Health & Specialist Centre Opportunity

Health care remains an opportunity, but a longer-term and more difficult one. A health centre is a destination use and proceeds only if Nova Scotia Health or the Province commits; the Municipality has less control over timing, and this report does not assume a major private medical development can be attracted. The need is real (55.9% of residents rated access poor), there appears to be sufficient municipal land near Woodlawn Drive and the municipal offices, and a health centre would add weekday traffic that supports the Phase 1 restaurants.

Table 71: Actions — 7.1 Partnerships and site (long term)

Priority	Action	Lead	Timing
High	Open discussions with Nova Scotia Health, Roseway Hospital, and physician-recruitment partners to confirm whether a community health centre fits provincial service planning, and what commitment would be required.	CAO, Economic Development	Medium term
High	Engage the Shelburne Community Partners committee alongside Nova Scotia Health's Western Zone, and collect letters of interest from private tenants (pharmacy, physiotherapy, dental, optometry, audiology) before approaching build-to-suit developers.	CAO, Economic Development	Medium term
Medium	Assess land availability and suitability at Woodlawn Drive and the municipal-office area for a clinic and complementary uses such as a pharmacy, diagnostics, and seniors' care.	Planning, Economic Development	Medium term
Medium	Identify provincial and federal capital or recruitment programs that could support a health centre, and record their eligibility conditions.	Economic Development, Finance	Medium term
Low	Set criteria for advancing (a committed partner and evidence of service demand), review at the Phase 2 mid-point, and do not market the opportunity until a partner is identified.	CAO, Council	Long term

Recommendation 08

08 Offer Incentives, Attract Operators, and Protect the Concept Through Land Disposition

Smaller municipalities have limited capacity to absorb servicing and infrastructure costs upfront. Windsor, HRM, and Moncton show that phased taxation, cost-sharing, and fee-based incentives let a municipality attract investment without expanding its capital plan, by sharing risk and cost with developers. A formal land disposition policy then protects the Municipality's long-term interest in the 103 Property and the agreed concept.

Table 72: Actions — 8.1 Financial incentive tool selection and design (medium term)

Priority	Action	Lead	Timing
High	Finalize the incentive tools for the 103 Property: phased taxation (as in Windsor and Bridgewater), cost-sharing on servicing upgrades, and municipal fee rebates or grants.	Economic Development, Finance	Medium term
Medium	Evaluate a TIEG or Employment Creation Incentive tied to job targets. A TIEG could rebate a declining share of the municipal tax increment, with the developer always paying the pre-development base tax in full. Servicing cost-sharing is a separate tool: a capped municipal share of eligible on-site servicing costs, recoverable through a local improvement charge or future tax increment.	Finance, Economic Development	Medium term
Medium	Confirm the provincial cap applicable to phased taxation, so the Municipality retains at least the minimum share of added revenue.	Finance	Medium term
Low	Document the finalized incentive package in the investor-facing materials.	Economic Development	Medium term

Table 73: Actions — 8.2 Operator and developer outreach (medium to long term)

Priority	Action	Lead	Timing
High	Run an operator solicitation tier by tier, beginning with the Tier 1 travel stop once the access approach, development agreement framework, and technical studies are in place, followed by retail operators in Phase 2.	Economic Development, CAO	Medium term
Medium	Prioritize local and regional operators already familiar with the Shelburne market, consistent with Moncton's relationship-first approach.	Economic Development	Medium term
Medium	Build ongoing relationship-building (industry associations, regional real estate forums) into the Economic Development team's mandate.	Economic Development	Medium term, then ongoing
Low	Track and report solicitation outcomes to Council against phase milestones.	Economic Development, CAO	Long term

Table 74: Actions — 8.3 Land disposition policy (long term)

Priority	Action	Lead	Timing
High	Draft and adopt a formal land disposition policy covering conditions of sale, phasing commitments, and a reacquisition clause modelled on Moncton's approach.	CAO, Legal, Council	Long term
Medium	Tie disposition terms to the anchor concept, phasing, and reserved access land (Recommendations 01 and 02), linking reacquisition rights to measurable milestones.	Legal, Planning	Long term
Medium	Where a proposal combines anchors on one parcel or departs from the agreed concept, address it through the development agreement terms, and build the approval timeline (including the public hearing) into phasing commitments.	Planning, Legal	Long term, as triggered
Medium	Designate a staff lead to monitor compliance with disposition agreements once development begins.	CAO	Long term, then ongoing

11.2 Implementation Plans by Anchor

Recommendations 01 to 08 set out what the Municipality needs to do across the whole site. This section turns them into a stand-alone implementation plan for each of the four anchors, so that each one can be managed as its own project with a clear sequence of steps, a lead, partners, funding routes, a go/no-go test, and measures of success. Timing is shown in project years from the start of the Foundation year, and every plan depends on the shared foundation work: preparing the development agreement framework under the Special Planning Area, completing the technical studies, and opening the highway access discussion with the Province. Each anchor is approved by Council through its own development agreement, and each can proceed with access from Pells Road or Woodlawn Drive if direct highway access is not approved.

Table 75: Indicative schedule — Implementation roadmap by anchor (Years 1-10)

Activity	Lead	Y1	Y2	Y3	Y4	Y5	Y6-10
Anchor 1: Highway Stop / Rest Area with EV Charging							

Activity	Lead	Y1	Y2	Y3	Y4	Y5	Y6-10
Verify gap and traffic; development agreement framework; studies; concept plan	Economic Development, Planning, Public Works						
Access campaign; local-road access design; signage	CAO, Council, Public Works						
Operator outreach, funding applications, and agreements	Economic Development, CAO						
Design, approvals, construction, and opening	Operator, Municipality						
Travel stop open; traffic and sales baseline	Economic Development						
Anchor 2: Highway Commercial / Retail Cluster							
Reserve pads; leakage study; target-tenant list	Planning, Economic Development						
Phase 2 go decision	Economic Development, Council						
Tenant agreements and pad servicing	CAO, Legal, Public Works						
Tenant construction and openings	Developers, tenants						
Anchor 3: Regional Health & Specialist Centre							
Reserve 2–4 acres on Woodlawn Drive	Planning						
Nova Scotia Health, Community Partners, and tenant engagement	CAO, Economic Development						
Partner decision gate	CAO, Council						
Build-to-suit selection, design, construction, opening	Developer, partners						
Anchor 4: Micro-Hotel (conditional)							
Reserve pad; include hotel use in the development agreement framework	Planning						
Feasibility study and operator test	Economic Development						
Hotel decision gate	Economic Development, Council						
Design and construction (if approved)	Operator						

Planned activity Conditional on a gate or partner commitment Decision point

Indicative timing. Phase 1 dates depend on the Province's response to the access request; Phase 2 and Phase 3 dates depend on the decision gates described in each plan.

Anchor 1: Highway Stop / Rest Area with EV Charging

Tier 1 · Phase 1 · Years 1-3

Highway Stop / Rest Area with EV Charging

Objective: open a branded highway service stop with fuel, food, convenience, washrooms, DC fast charging, and truck and RV parking that serves Highway 103 traffic year-round and draws travellers into the node.

Table 76: Anchor 1 at a glance

Element	Plan
Concept	8,000–12,000 sq ft building (washrooms, 3–4 food units, convenience retail, visitor information); 8–12 pump canopy with a truck lane; DC fast-charging hub (8–12 stalls suggested); 30–50 truck and RV spaces; tall highway sign. A full truck stop is not recommended until truck volumes are known.
Location and land	A first pod of about 20–25 acres on the highway-facing lands near Exits 25 and 26, with right-of-way reserved for future ramps and internal circulation.
Recommended delivery model	Long-term ground lease to a fuel and convenience operator (the Municipality keeps the land and future access control), or a conditional sale with phasing commitments and a reacquisition clause. A joint venture with a First Nation development corporation is a strong alternative.
Municipal role	Prepare the development agreement framework, lead the access and signage campaign, complete studies, offer incentives (phased taxation, servicing cost-sharing), and run a local-first operator solicitation.
Lead	Economic Development, with the CAO and Public Works
Partners	Fuel: Irving/Circle K, Ultramar, Petro-Canada dealers, Co-op, Wilsons, Parkland. Food: Tim Hortons (existing franchisee), A&W, Mary Brown's, Dairy Queen, McDonald's. Charging: Nova Scotia Power, Tesla, FLO. Province: Public Works (access, signage, traffic data).
Funding routes	Operator capital; federal Zero Emission Vehicle Infrastructure Program (ZEVIP) and any provincial EV programs; utility partnership for charging; servicing cost-sharing and phased taxation from the Municipality; federal or provincial infrastructure funding for access works where eligible (to be confirmed).

Table 77: Anchor 1 implementation steps

Step	Action	Lead	Timing	Output
1	Obtain Highway 103 traffic and truck share at Exits 24–27, and inventory existing fuel, food, charging, and RV services between Liverpool and Yarmouth.	Public Works, Economic Development	Year 1, Q1–Q2	Verified service gap and traffic base
2	Prepare the development agreement framework for the highway frontage under the Special Planning Area, setting out the anchor uses, layout, and terms Council expects.	Planning, Council	Year 1, Q1–Q3	Development agreement framework
3	Open the access campaign (pre-consultation with Public Works, traffic impact study scope, Council resolution, ministerial meeting) and, in parallel, design the stop to work from Pells Road or Woodlawn Drive.	CAO, Council, Public Works	Year 1 – Year 2	Provincial position on access; local-road access design
4	Complete geotechnical, servicing, hazard, and electrical-capacity studies for the pod; test on-site well and septic or a package plant against municipal extension.	Public Works, Engineering	Year 1, Q2–Q4	Servicing solution and cost estimate
5	Commission a concept plan with three funding scenarios (Glooscap model), including site layout, phasing, and reserved access land.	Economic Development, Planning	Year 1, Q3–Q4	Concept plan and business case
6	Run local-first conversations with fuel, food, and charging operators, then a formal expression-of-interest call.	Economic Development	Year 1 H2 – Year 2 H1	Short-list of operators with site criteria

Step	Action	Lead	Timing	Output
7	Apply for EV charging and infrastructure funding with the selected charging partner.	Economic Development, Finance	Year 1 H2 – Year 2	Funding applications submitted
8	Select the operator and negotiate the ground lease or conditional sale and the development agreement, including phasing commitments, signage, access, and reacquisition terms.	CAO, Legal, Council	Year 2 H2	Executed agreements; development agreement approved
9	Detailed design, development approvals, fuel storage approvals, and advance signage application.	Operator, Planning, Public Works	Year 2 H2 – Year 3 H1	Permits and signage approval
10	Construction, servicing connection, and opening; record a traffic and sales baseline.	Operator, Municipality	Year 3	Travel stop open

Go / no-go test for Anchor 1

Proceed to agreements when	The access approach is settled (direct access approved, or a local-road access design and advance signage that operators accept); traffic data supports the format; a fuel operator and a charging partner have committed.
Pause or adjust if	Operators will not commit on local-road access alone (pursue direct access further or resize the format), traffic is too low for the format, or servicing costs exceed what cost-sharing can cover.
Measures of success	Opening date achieved; jobs created; new commercial assessment added; charger sessions and fuel and food transactions (targets set with the operator); year-round, off-season revenue; travellers directed to Shelburne attractions.

Anchor 2: Highway Commercial / Retail Cluster

Tier 2 · Phase 2 · Years 3–5

Highway Commercial / Retail Cluster

Objective: add small-format retail and services beside the travel stop that recapture spending currently leaving the county, without competing with downtown.

Table 78: Anchor 2 at a glance

Element	Plan
Concept	A cohesive cluster of pads for small-format value retail (Dollarama-type), a small-format grocery, building supply, a bank or credit union branch or financial services kiosk, and one or two restaurants. No large-format retail and no apparel, gift, or dining uses that belong on Water Street.
Location and land	A first phase of about 8–12 acres on the highway-facing lands beside the travel stop, sharing its access, internal roads, and servicing; room to grow parcel by parcel.

Element	Plan
Recommended delivery model	Individual serviced pads offered by ground lease or conditional sale, or a single developer for the whole cluster under a development agreement.
Municipal role	Measure leakage by category, build the target-tenant list, plan and service pads in step with Phase 1, and coordinate with any Town development at Exit 26.
Lead	Economic Development, with Planning
Partners	Dollarama, Giant Tiger, Sobeys or Co-op, Home Hardware or Kent, a bank or credit union, Crombie REIT, regional developers active in Shelburne, Yarmouth, and Bridgewater.
Funding routes	Private developer and tenant capital; municipal fee rebates, phased taxation, or a TIEG tied to job creation; shared servicing with Phase 1.

Table 79: Anchor 2 implementation steps

Step	Action	Lead	Timing	Output
1	Reserve the retail pads and their shared access in the Year 1 spatial plan.	Planning	Year 1	Land reserved
2	Measure spending leakage by category and survey businesses on what residents leave to buy.	Economic Development	Year 2	Leakage profile
3	Build a named target-tenant list and confirm each retailer's site criteria (population, traffic, pad size).	Economic Development	Year 2 – Year 3	Target-tenant list
4	Review Phase 1 traffic and sales baseline and confirm the cluster concept.	Economic Development, Council	Year 3 H1	Go decision for Phase 2
5	Approach tenants and developers, local-first, starting with value retail, grocery, and financial services.	Economic Development	Year 3 H2 – Year 4 H1	Letters of intent
6	Agree pad leases or sales and any incentives.	CAO, Legal	Year 4	Executed agreements
7	Extend servicing and site works to the pads.	Public Works, Engineering	Year 4 H2 – Year 5 H1	Serviced pads
8	Tenant construction and openings.	Developers, tenants	Year 5	Cluster open

Go / no-go test for Anchor 2

Proceed when	The travel stop is open and its traffic baseline supports retail; at least two tenants have signed letters of intent for the first pads; uses do not duplicate downtown.
Pause or adjust if	Phase 1 traffic is below expectations; tenants require a larger trade area than Shelburne can offer; Town development at Exit 26 targets the same tenants.
Measures of success	Floor area leased and occupied; new businesses and jobs; reduction in residents leaving to shop (tracked through repeat surveys); new commercial assessment.

Anchor 3: Regional Health & Specialist Centre

Tier 2 · Phase 3 · Years 5–10 (partnership work from Year 2)

Regional Health & Specialist Centre

Objective: bring primary care, visiting specialists, diagnostics, rehabilitation, pharmacy, and allied health closer to residents, complementing Roseway Hospital.

Table 80: Anchor 3 at a glance

Element	Plan
Concept	A public–private health centre: Nova Scotia Health services (specialist outreach, lab collection, diagnostics) alongside private tenants (pharmacy, physiotherapy, dental, optometry, audiology), with seniors' services as a later option.
Location and land	About 2–4 acres on Woodlawn Drive or near the municipal offices, away from fuel and truck traffic, with room for a later seniors' living campus and health-worker housing.
Recommended delivery model	Build-to-suit by a healthcare developer on a municipal ground lease, with Nova Scotia Health and private tenants leasing space.
Municipal role	Convene partners, reserve and service the land, gather tenant commitments, and advocate for provincial services.
Lead	CAO, with Economic Development
Partners	Nova Scotia Health (Western Zone), Roseway Hospital, the Shelburne Community Partners committee, physician-recruitment partners, private health tenants (including TLC Pharmasave's pharmacy primary care model), build-to-suit developers.
Funding routes	Provincial health capital planning; private tenant and developer capital; provincial and federal recruitment programs; municipal land contribution through a ground lease.

Table 81: Anchor 3 implementation steps

Step	Action	Lead	Timing	Output
1	Reserve 2–4 acres on Woodlawn Drive in the Year 1 spatial plan.	Planning	Year 1	Land reserved
2	Open discussions with Nova Scotia Health's Western Zone, Roseway Hospital, and the Community Partners committee on service gaps and fit with provincial planning.	CAO	Year 2 – Year 3	Confirmed service list
3	Collect letters of interest from private tenants (pharmacy, physio, dental, optometry, audiology).	Economic Development	Year 3 – Year 4	Tenant commitments
4	Assess servicing and local-road access for the Woodlawn Drive site, and prepare development agreement terms for a health facility.	Planning, Engineering	Year 4	Site ready for an offer
5	Decision gate: committed public partner or enough private tenants to anchor the building.	CAO, Council	Year 5	Go / defer decision

Step	Action	Lead	Timing	Output
6	Issue a request for build-to-suit proposals and select a developer.	Economic Development, Legal	Year 5 – Year 6	Developer agreement and ground lease
7	Design, approvals, and construction.	Developer, Planning	Year 6 – Year 8	Centre built
8	Opening and later phases (seniors' services, health-worker housing).	Partners	Year 8 – Year 10	Centre open; campus expansion

Go / no-go test for Anchor 3

Proceed when	Nova Scotia Health commits services to the site, or private tenants have committed to enough space to anchor the building; servicing is resolved and a development agreement can be brought to Council.
Defer if	No public or private anchor commits by Year 5. Keep the land reserved, review at each roadmap review, and do not market the opportunity until a partner is identified.
Measures of success	Services and specialist clinic days delivered locally; residents served without travelling to Yarmouth or Bridgewater; health professionals recruited; jobs created.

Anchor 4: Micro-Hotel / Limited-Service Hotel (Conditional)

Conditional · Phase 2 · Years 3–5

Micro-Hotel / Limited-Service Hotel

Objective: add branded, year-round overnight accommodation beside the travel stop, only if demand is proven.

Table 82: Anchor 4 at a glance

Element	Plan
Concept	A limited-service hotel at the lower end of the 25–50 room range tested in the roadmap, consistent with Bridgewater's 20–40 room benchmark.
Location and land	A reserved pad of about 2–3 acres beside the travel stop, sharing access and servicing.
Recommended delivery model	Pad sale or ground lease to a franchisee or local owner-operator, with a build-by date and reacquisition clause.
Municipal role	Reserve the pad, commission the feasibility study, set the trigger for proceeding, and bring a hotel proposal to Council as a development agreement.
Lead	Economic Development
Partners	Franchisees of Hampton, Holiday Inn Express, Comfort Inn, Best Western, Choice, and Wyndham brands; local motel and inn owners; Tourism Nova Scotia.

Element	Plan
Funding routes	Private hotel capital; regional tourism and business development programs (eligibility to be confirmed); municipal phased taxation.

Table 83: Anchor 4 implementation steps

Step	Action	Lead	Timing	Output
1	Reserve the hotel pad in the spatial plan and include hotel use in the development agreement framework.	Planning	Year 1	Pad reserved
2	Commission a hotel feasibility study using Tourism Nova Scotia room-night data, seasonality, competition, and the status of the Yarmouth–Bar Harbor ferry.	Economic Development	Year 3	Demand and occupancy estimate
3	Test interest with brands and local owner-operators.	Economic Development	Year 3 H2 – Year 4 H1	Operator interest confirmed or not
4	Decision gate.	Economic Development, Council	Year 4 H1	Go / defer decision
5	If go: agree pad terms, design, approvals, and construction.	Operator, Planning	Year 4 H2 – Year 5	Hotel open

Go / no-go test for Anchor 4

Proceed when	The feasibility study shows year-round occupancy at or above the 65% benchmark used in the Bridgewater study; an operator commits; the travel stop is open.
Defer if	Demand is too seasonal or no operator commits. Keep the pad reserved and revisit at the next roadmap review.
Measures of success	Occupancy and room nights; overnight stays captured in Shelburne; visitor spending; jobs.



Shelburne Harbour from the air

11.3 Implementation Roadmap

This roadmap sets out a ten-year pathway to move the 103 Property from its current state of market readiness to an established commercial node, in the order of the agreed phasing. Timing is indicative: Phase 1 operators are unlikely to commit until the highway access position is clear, so the dates depend on the Province's response to the access request.

Year 1
Foundation
Confirm, study, and prepare before asking anyone to commit.

Years 1–3
Phase 1
Highway travel stop and EV charging, with the access campaign.

Years 3–5
Phase 2
Retail and commercial cluster; micro-hotel if demand is proven.

Years 5–10
Phase 3
Health/medical centre, once a partner commits.

The Highway 103 roadmap describes four phases. They map onto this report's phasing as follows.

Table 84: Roadmap phases compared with this report

Roadmap phase	Question it answers	Equivalent in this report
Phase 1: First Anchor	What should be developed first, where, and with what land, access, and servicing?	Foundation year and Phase 1: the highway travel stop with EV charging on the highway-facing lands.
Phase 2: Supporting Businesses	Which two to four complementary uses could follow?	Phase 2: retail and commercial cluster, and the micro-hotel if demand is proven.
Phase 3: Expansion	How could more parcels, roads, and servicing open more of Woodlawn Drive and the highway lands?	Phase 2 servicing and Phase 3: opening the Woodlawn Drive lands for the health centre.
Phase 4: Commercial Node	What could the two areas look like functioning together?	Phase 3 build-out (Years 6–10): the full node, with possible seniors' living and health-worker housing on Woodlawn Drive.

Table 85: Indicative schedule — Phased implementation plan

Activity	Lead	Y1	Y2	Y3	Y4	Y5	Y6-10
Foundation: confirm, study, and prepare							
Anchor hierarchy and spatial plan (Rec. 01)	Economic Development, Planning, Council	■					
Technical and servicing studies (Rec. 03)	Public Works, Engineering, Planning	■					
Development agreement framework and investor materials (Rec. 04)	Planning, Economic Development	■					
Incentives and land disposition policy (Rec. 08)	CAO, Legal, Council, Finance	■	■	■			
Phase 1: highway travel stop + EV charging							
Highway access and signage (Rec. 02)	CAO, Council, Public Works, Planning	■	■	■	■		

Activity	Lead	Y1	Y2	Y3	Y4	Y5	Y6-10
Operators and EV funding (Rec. 05)	Economic Development, CAO						
Travel stop build-out	Operator(s), Municipality						
Phase 2: commercial / retail expansion							
Retail cluster and hotel test (Rec. 06)	Economic Development, Planning						
Retail and hotel build-out (if demand proven)	Developer(s), Municipality						
Phase 3: health / medical development							
Health/medical partnerships (Rec. 07)	CAO, Economic Development						
Health/medical build-out (if partner commits)	Partner, Municipality						
Compliance and performance monitoring	CAO, Economic Development, Council						



Bars show the indicative timing of each workstream, based on the action timing in Recommendations 01 to 08. Phase 1 in particular depends on the Province's response to the access request.

11.3.1 Foundation: Confirm, Study, and Prepare (Year 1)

Purpose. Settle the anchor hierarchy and spatial plan, begin highway access discussions, complete technical due diligence, prepare the development agreement framework, and assemble investor-facing materials, reducing risk before any external outreach begins.

Table 86: Indicative schedule — Foundation (Year 1, by quarter)

Activity	Lead	Q1	Q2	Q3	Q4
Anchor hierarchy, spatial plan, and development agreement framework					
Adopt anchor hierarchy, phasing, and spatial direction	Economic Development, Council				
Concept spatial plan, with land reserved for future access	Planning, Public Works				
Confirm the anchor uses Council will consider under the SPA	Planning				
Prepare the development agreement framework	Planning, Council				
Coordinate with the Town on development around Exit 26	CAO, Economic Development				
Highway access and signage (start)					
Assemble the access fact base	Public Works, CAO				
Request pre-consultation meeting with Public Works	CAO, Council				
Obtain mainline traffic volumes and truck share, Exits 24–27	Public Works				
Agree traffic impact study scope; commission the study	Public Works, Engineering				

Activity	Lead	Q1	Q2	Q3	Q4
Request written guidance on service signage and pylons	Public Works, Planning				
Technical studies and servicing					
Geotechnical / soils assessment, both parcels	Public Works, Engineering				
Servicing capacity study, incl. electrical capacity for charging	Public Works, Engineering				
Flood, wetland, coastal hazard; wildfire design inputs	Planning, Engineering				
Servicing feasibility and financing study	Economic Development, Finance				
Investor readiness and policy					
Single point of contact; indicative approvals timeline	Economic Development, Planning				
Draft incentive tools and land disposition policy	CAO, Legal, Finance				
Investment-readiness dossier; Invest Nova Scotia listing	Economic Development, Engineering				
Foundation review and decision to proceed to outreach	CAO, Council				

Planned activity Conditional on a gate or partner commitment Decision point

The Foundation phase removes uncertainty before the Municipality asks anyone to commit. It has three objectives: settle the Municipality's position on what it wants on the 103 Property and where; find out what the Province will and will not allow on Highway 103; and produce the technical and regulatory information operators will expect. Nothing in this phase requires an operator, a developer, or a provincial decision, which is why it can start immediately.

The first quarter is largely internal. Council adopts the anchor hierarchy and phasing, Planning begins the development agreement framework under the Special Planning Area, and a concept spatial plan allocates uses between the two areas, shows how each works with access from Pells Road and Woodlawn Drive, and reserves land for future ramps, circulation, and right-of-way. In the same quarter the Municipality requests its first meeting with Nova Scotia Public Works and begins assembling the access fact base. From the second quarter, geotechnical, servicing, hazard, and wildfire work runs in parallel, and the traffic impact study is scoped with the Province before it is commissioned.

Decision gates and dependencies

End of Q1	Council has adopted the anchor hierarchy, phasing, and spatial direction, and confirmed the anchor uses it is prepared to consider under the Special Planning Area.
End of Q2	The Province has given an initial view on access options and the traffic impact study scope, and a draft development agreement framework is ready.
End of Q4	Studies are complete, the investment-readiness dossier is assembled, and Council decides whether to proceed to operator outreach.
Dependency	The Province's willingness to meet early. If it is slow, internal and technical work continues and the request is escalated through Council and the local MLA.

Risks and how they are managed. A study may identify a constraint that changes the layout, so studies are commissioned early and treated as inputs to the spatial plan. Provincial engagement may be slower than planned, so internal work runs in parallel and the site is designed to work from the local roads.

Outputs. An adopted anchor hierarchy, phasing, and concept spatial plan with reserved access land; a development agreement framework; an access fact base, a provincially scoped traffic impact study, and written signage guidance; geotechnical, servicing, hazard, and wildfire studies and a financing assessment; and an investment-readiness dossier, single point of contact, approvals timeline, and draft incentive and disposition policies.

11.3.2 Phase 1: Highway Travel Stop + EV Charging (Years 1–3)

Purpose. Secure the primary anchor: continue the highway access request, bring in fuel, EV charging, and quick-service operators, and build the first phase of the travel stop.

Table 87: Indicative schedule — Phase 1 (Years 1–3, by half-year)

Activity	Lead	Y1 H1	Y1 H2	Y2 H1	Y2 H2	Y3 H1	Y3 H2
Highway access campaign							
Stage 1: build the case and evidence package	Public Works, CAO						
Stage 2: technical engagement; traffic study review	Public Works, Engineering						
Stage 3: political engagement and letters of support	Council, CAO						
Stage 4: provincial decision and capital-plan inclusion	Council, CAO						
Stage 5: design and construction of access (if approved)	Public Works, Province						
Advance signage							
Confirm signage rules; prepare application	Public Works, Planning						
Provincial approval of advance signs	Public Works						
Installation of advance signage, timed to opening	Public Works, Operator						
Operators and EV charging							
Fuel and convenience operator outreach; short-list	Economic Development, CAO						
Quick-service restaurant outreach	Economic Development						
EV partners, utility capacity, and subsidy applications	Economic Development, Finance						
Truck and RV parking and rest-area format	Economic Development, Public Works						
Land, servicing, and build-out							
Land disposition, operator, and development agreements (once access approach is settled)	CAO, Legal, Council						
Site servicing and electrical upgrades	Public Works, Engineering						
Construction and opening of the travel stop	Operator(s), Municipality						
Performance baseline and Phase 2 trigger review	Economic Development, Council						

Planned activity Conditional on a gate or partner commitment Decision point

Phase 1 has two tracks that run together: the access and signage campaign with the Province, and the commercial track in which operators, charging partners, and funding are lined up. Operator conversations begin in the second half of Year 1. Agreements should wait until the access approach is settled, either direct access approved or a local-road access design from Pells Road or Woodlawn Drive that operators accept, so that the format and terms reflect how customers will reach the site. A provincial deferral or refusal of direct access changes the format, not whether the site can be developed.

EV charging runs alongside from the start. ONroute shows that highway fast charging has relied on a utility-backed partner and public financing, so the Municipality should approach Nova Scotia Power, charging operators, and the fuel operator early, confirm electrical capacity and upgrade costs, and pursue funding such as ZEVIP before application windows are missed.

Highway access lobbying plan. Highway 103 is a 100-series highway where new connections are controlled by the Province, and nothing near Shelburne is in the current five-year plan, so the Municipality should plan for a campaign of two to three years rather than a single request.

Table 88: Highway access lobbying stages

Stage	What happens	Lead	Output
1. Build the case (Year 1)	Assemble mainline traffic and truck share, collision history at Exits 24 to 27, and Council's October 2023 letter. Document the highway service gap, and prepare concept access options and a short economic case.	Public Works, CAO	Evidence package and one-page summary of the ask
2. Technical engagement (Year 1 H2 – Year 2 H1)	Meet Public Works traffic and highway design staff, agree the traffic impact study scope, share concept options, and request written feedback on feasibility, permits, geometry, and cost-sharing.	Public Works, Engineering	Provincially accepted study and written technical feedback
3. Political engagement (Year 1 H2 – Year 2 H2)	Council resolution; ministerial meeting with the local MLA's support; letters of support from the Town, Chamber, tourism partners, and (as expressions of interest) prospective operators and charging partners.	Council, CAO	Resolution, ministerial meeting, and letters
4. Provincial decision (Year 2 H1 – Year 3 H1)	Request inclusion of access works in the capital plan, aligned to the annual cycle, and negotiate conditions, design and construction responsibility, and cost-sharing.	Council, CAO	Written provincial position; agreement in principle
5. Design and delivery (Year 2 H2 – Year 3 H2)	If approved, complete detailed design, permits, and construction, sequenced with servicing and the operator's build.	Public Works, Province	Access works open with the travel stop

Table 89: Highway access lobbying — audiences and requests

Audience	What the Municipality asks for	When
Nova Scotia Public Works (staff)	Technical guidance on access options, permits, and traffic study scope; written feedback; signage guidance.	Year 1 H1 onward
Minister of Public Works	Inclusion of access works in the capital plan, or a clear written position and conditions for approval.	Year 1 H2 to Year 2 H2
Local MLA	Support within government and help securing a ministerial meeting.	Year 1 H1 onward
Council and the Warden	A formal resolution, delegation to the Province, and annual updates.	Year 1 H1; annually

Audience	What the Municipality asks for	When
Town of Shelburne	A joint position, and coordination on development planned around Exit 26.	Year 1 H1 onward
Chamber of Commerce and local businesses	Letters describing the service gap and the jobs and tax base the stop would add.	Year 1 H2
Tourism partners	Letters on the need for traveller services and advance signage.	Year 1 H2
Nova Scotia Power and charging operators	Expressions of interest in a fast-charging hub and confirmation of the corridor gap (not commitments).	Year 1 H1 to Year 2 H1
Federal partners	Funding for charging infrastructure and, where eligible, access works.	Year 1 H1 onward

Advance signage. The Municipality should first confirm in writing what signage is permitted and how far ahead of the exit it can be placed, then request signs several kilometres before the stop for traffic from each direction. The application should be made about a year before opening, with the operator's pylon sign agreed at the same time.

Table 90: Possible provincial responses

Provincial response	What it means	Municipality's next step
Approval in principle	Direct access can be planned, and operator commitments can proceed.	Agree design responsibilities and cost-sharing; proceed to land disposition and operator agreements; sequence construction with access works.
Conditional approval	Access is possible, subject to conditions such as intersection upgrades, a phased build, or cost-sharing.	Negotiate conditions; secure developer contributions through the disposition; adjust phasing to match.
Deferred to a future capital plan	Direct access will not be available within Phase 1 as planned.	Proceed with access from Pells Road or Woodlawn Drive and strong advance signage, sizing the format to that access; keep the reserved land and the direct-access request active each year.
Declined, or alternative route proposed	Direct access is not possible as designed.	Develop with access from Pells Road or Woodlawn Drive (or the nearest approved connection) and a well-signed route from the exit; confirm operator interest in that format before committing.

Decision gates and dependencies

Gate 1 (end of Year 1)	The evidence package is complete and the Province has accepted the traffic impact study scope.
Gate 2 (Year 2)	The access approach is settled: direct access approved, or a local-road access design and advance signage that operators accept.
Gate 3 (Year 2 H2)	Servicing, electrical capacity, and incentives are confirmed, and at least a fuel operator and a charging partner are committed.
Gate 4 (Year 3 H2)	The stop is open, and a traffic and sales baseline is recorded to inform Phase 2.

Risks and how they are managed. The largest risk is that the Province defers or declines access, which is outside the Municipality's control; it is managed by building the case early, engaging technically and politically at the same time, keeping land and layout options open, and agreeing fallbacks in advance. Operator hesitation on a small, seasonal market is managed by favouring operators that serve local daily demand as well as travellers and confirming traffic data before marketing. The cost of access works and servicing is managed through the tools in Recommendation 08.

Outputs. A settled access approach (direct access delivered or scheduled, or local-road access built); advance signage approved and installed; an open travel stop with fuel and convenience, one or two quick-service restaurants, truck and RV parking, and DC fast charging; an approved development agreement and executed disposition agreements with reacquisition clauses; and a traffic and sales baseline.

11.3.3 Phase 2: Commercial / Retail Expansion (Years 3–5)

Purpose. Build a cohesive commercial cluster on the traffic generated by Phase 1, and decide whether the micro-hotel proceeds.

Table 91: Indicative schedule — Phase 2 (Years 3–5, by half-year)

Activity	Lead	Y3 H1	Y3 H2	Y4 H1	Y4 H2	Y5 H1	Y5 H2
Review and coordination							
Roadmap review and Phase 1 performance check	Economic Development, Council	◆					
Coordination with the Town's Exit 26 development	CAO, Economic Development	■	■	■	■	■	■
Access monitoring and follow-on provincial requests	Public Works, CAO		■	■	■	■	■
Retail and commercial cluster							
Cluster concept and target tenant list	Economic Development, Planning	■	■				
Inquiries to Dollarama, Giant Tiger, and similar retailers	Economic Development		■	■			
Land disposition or leases for retail pads	CAO, Legal			■	■		
Servicing and site works	Public Works, Engineering				■	■	
Retail build-out and openings	Developer(s), Municipality					■	■
Micro-hotel (conditional)							
Reserve pad; hotel feasibility study and demand test	Planning, Economic Development	■	■				
Decision gate: proceed only if demand is proven	Economic Development, Council			◆			
Design, approvals, and build (if approved)	Developer(s), Municipality				▨	▨	▨
Preparing Phase 3							
Early discussions with Nova Scotia Health and partners	CAO, Economic Development	■	■	■	■	■	■
Land and servicing assessment, Woodlawn Drive and municipal offices	Planning, Engineering			■	■	■	

■ Planned activity ▨ Conditional on a gate or partner commitment ◆ Decision point

The phase opens with a review comparing the Phase 1 traffic and sales baseline with this report's assumptions, confirming that Phase 2 is justified. Coordination with any Town development around Exit 26 continues so the two do not compete for the same tenants. The micro-

hotel pad is reserved but not marketed, and a feasibility study using Tourism Nova Scotia room-night data tests demand; the hotel proceeds only at a decision gate in Year 4 if demand is demonstrated and an operator commits. By this phase, access works and signage should be in place or scheduled; the work is to monitor them and make follow-on requests, such as turning lanes, where added retail traffic calls for them.

Decision gates and dependencies

Gate 1 (Year 3 H1)	The review confirms that Phase 1 is operating and the retail concept still reflects demand.
Gate 2 (Year 4 H1)	Hotel decision gate: demand is proven and an operator commits, or the hotel is deferred.
Dependency	Phase 1 traffic. If the travel stop underperforms, the retail program is scaled back and phased.

Risks and outputs. Thin retail demand is managed by testing tenants before building and keeping units small and adaptable; the hotel is kept conditional so no capital is committed ahead of demand; and competition with Town development is managed through early coordination. Outputs are an operating retail cluster, a hotel decision, and a land and servicing assessment for the health/medical site with partner discussions under way.

11.3.4 Phase 3: Health / Medical Development (Years 5–10)

Purpose. Pursue the health/medical centre as a longer-term opportunity, advancing only when a committed partner and evidence of service demand are in place.

Table 92: Indicative schedule — Phase 3 (Years 3–10, by year)

Activity	Lead	Y3	Y4	Y5	Y6	Y7	Y8–10
Partnerships and planning							
Discussions with Nova Scotia Health, Roseway Hospital, recruitment partners	CAO, Economic Development						
Land availability and servicing, Woodlawn Drive and municipal offices	Planning, Engineering						
Provincial and federal capital and recruitment programs scan	Economic Development, Finance						
Decision gate: committed partner and evidence of service demand	CAO, Council						
Development (if a partner commits)							
Land disposition or lease and agreements	CAO, Legal, Council						
Design and approvals	Partner, Planning						
Construction and opening of the health/medical centre	Partner, Municipality						
Complementary uses: pharmacy, diagnostics, seniors' care	Partner, Economic Development						
Monitoring and reporting							
Compliance monitoring of disposition agreements	CAO, Economic Development						
Local road and access improvements for destination uses	Public Works, Planning						

Activity	Lead	Y3	Y4	Y5	Y6	Y7	Y8-10
Progress reports to Council and roadmap reviews	CAO, Council						

Planned activity Conditional on a gate or partner commitment Decision point

Phase 3 is the longest and least certain phase, because it depends on decisions the Municipality does not control. Partnership work starts in Year 3 so the Municipality is part of the Province's planning conversations before decisions are made. The decision gate at the start of Year 5 sets the test for advancing: a committed partner and evidence of service demand. If met, land disposition, design, and construction follow, with complementary uses added later; if not, the land stays reserved and is reviewed at each roadmap review. Access work in this phase is mainly about local roads on Woodlawn Drive and connecting streets, with clear routes between the highway lands and the health/medical lands.

Decision gates and dependencies

Gate 1 (Year 5)	A committed partner and evidence of service demand. Without these, the opportunity is not marketed.
Gate 2 (Year 6)	Land agreements signed with phasing commitments and a reacquisition clause.
Dependency	Provincial capital and service planning, which sets the timing.

Risks and outputs. The main risk is that no partner commits within this report's horizon; it is managed by explicit criteria, reserved land, and no municipal capital in advance of a partner. Overstating the opportunity to the community is avoided by describing it as longer-term and conditional in all public materials. Outputs are a committed partner and signed agreements (or a documented decision to defer), and, if it proceeds, an operating health/medical centre with ongoing compliance monitoring and reporting to Council.



Beaches of the Shelburne coast

11.4 Risk Management and Evaluation Criteria

The risks below are drawn from the 103 Property assessment, the agreed anchor hierarchy and phasing, and the recommendations and phase plans above. Most are already present rather than hypothetical. They are presented roughly in the order in which they would affect the plan, each with its mitigation, and should be reviewed at the 18-24 month mid-point and before each phase begins.

Table 93: Principal risks and mitigations

Risk	Description	Mitigation
No direct highway access	No direct access to Highway 103 and nothing for Shelburne in the five-year plan; Council has raised safety concerns at Exit 26. The Province may defer, attach conditions, or decline. Without direct access the stop would capture less passing traffic, but the site can still be developed from Pells Road or Woodlawn Drive.	Begin the access campaign in the Foundation year; design the first phase to work from the local roads; seek strong advance signage; size the format to the access available; preserve land for future ramps (Rec. 02).
Limited or delayed advance signage	Signage is provincially controlled, and the rules have not been confirmed. Without it the stop captures less passing traffic.	Request written guidance early, apply about a year before opening, agree the pylon sign at the same time, and make signage a condition of opening (Rec. 02, 05).
Unconfirmed traffic and other inputs	Mainline traffic and truck share are not yet obtained and are likely modest; junction types, the charging gap length, and ONroute terms rest on secondary sources.	Obtain traffic data and confirm inputs before marketing; size Phase 1 to the data (Rec. 02, 05).
A Phase 1 delay delays what follows	Retail depends on travel stop traffic, and operators will not commit before access is known.	Run internal, technical, and operator work in parallel; review before each phase; keep health partner discussions on their own timeline.
EV charging capacity, funding, and partners	Fast charging needs substantial power; funding has eligibility rules and windows; partners may wait for traffic data.	Confirm capacity in the servicing study; approach partners in Year 1; apply early, including ZEVIP (Rec. 03, 05).
Seasonality, operator interest, and the hotel	Summer traffic runs 30% to 40% above average; the trade area is small; the Yarmouth–Bar Harbor ferry contract expires after 2026.	Favour operators serving local daily demand; test interest early; keep the hotel conditional with its pad reserved but not marketed (Rec. 05, 06).
Cannibalization of existing businesses	A highway stop will draw trade from Ohio Road and King Street businesses, including the existing Tim Hortons.	Avoid duplicating downtown retail; steer apparel, gifts, and dining to Water Street; engage the existing franchisee (Rec. 05, 06).
Overlap with Town development at Exit 26	Competing for the same tenants, traffic, or provincial attention.	Confirm the Town's plans early; coordinate through Phases 1 and 2; consider a joint approach to the Province (Rec. 01).
Development agreement approval	Each anchor needs Council approval of a development agreement under the Special Planning Area, which includes public notice and a public hearing.	Publish a development agreement framework early, consult the community on the concept in advance, and build the approval step into each anchor's timeline (Rec. 04).
Unconfirmed site conditions	No confirmed servicing or hazard determination; wildfire risk (the 2023 Barrington Lake fire closed Highway 103).	Commission geotechnical, servicing, hazard, and wildfire work before marketing (Rec. 03).
Servicing cost feasibility	Developers are responsible for servicing under the MPS; high costs may deter operators.	Concept-level estimate; test well and septic or package plant against municipal extension; test cost-sharing (Rec. 03).
Health centre depends on a provincial partner	Little municipal control over timing; overstating the likelihood would damage credibility.	Treat as Phase 3; set advancement criteria; do not market until a partner is identified (Rec. 07).

Risk	Description	Mitigation
Community alignment and expectations	The travel stop was not a direct community request; placing health third and excluding housing may be read as unresponsive.	Explain how anchors were chosen and sequenced, show how travel stop revenue supports later phases, and test public alignment during outreach (Rec. 01, 07).
Loss of municipal leverage after disposition	Without a policy, no recourse if an operator does not follow through.	Adopt a disposition policy with a Moncton-style reacquisition clause tied to milestones and reserved access land (Rec. 08).
Municipal capacity and coordination	Delivering all workstreams at once exceeds current team capacity.	Phase external scopes through the budget process, assign clear leads, and consider dedicated project support in the Foundation year (Rec. 01–08).

Evaluation Criteria for Prioritizing Investment

These criteria should be applied consistently when evaluating any development proposal for the 103 Property and allocating limited municipal capacity and incentive budget. Applying them transparently protects Council from ad hoc pressure and provides a defensible basis for decisions.

1. **Anchor hierarchy fit (highest weighting):** the extent to which a proposal matches the anchor hierarchy, phasing, and land allocation in Recommendation 01, with the travel stop and EV charging first.
2. **Highway access and technical feasibility:** the cost, complexity, and risk of access, servicing, geotechnical conditions, and hazard exposure (Recommendations 02 and 03).
3. **Financial exposure to the Municipality:** how far a proposal minimizes municipal capital exposure using the tools in Recommendation 08, weighed against the cost of continued deferral.
4. **Contribution to a cohesive cluster:** whether a proposal reinforces the other uses on the highway lands rather than standing alone or duplicating downtown.
5. **Community vision alignment:** consistency with the community-endorsed vision (Section 10.2.1) and priorities raised through engagement.
6. **Delivery capacity and track record:** demonstrated ability to deliver committed phases, favouring local and regional operators familiar with the Shelburne market.

Decision Gate for Any Future Disposition Proposal

No disposition of the 103 Property, whether a sale, long-term lease, or phased development agreement, should proceed unless the proposal meets all of the following conditions. The gate applies equally to municipally initiated solicitations and unsolicited proposals.

1. Confirms alignment with the anchor hierarchy, phasing, and land allocation in Recommendation 01, including land reserved for future highway access.
2. Is supported by completed access guidance and geotechnical, servicing, and hazard studies (Recommendations 02 and 03), with no unresolved red flags and, for any proposal that depends on the travel stop, a settled access approach (direct or local-road).
3. Includes a servicing cost-sharing structure consistent with the model tested under Recommendation 03, so costs do not fall solely to the Municipality.
4. Demonstrates the proponent's capacity to deliver committed phases, with references or a track record.
5. Is brought forward as a development agreement under the Special Planning Area, with the public hearing built into the phasing timeline (Recommendations 04 and 08).

6 Includes phasing commitments and a reacquisition clause consistent with the land disposition policy (Recommendation 08).

7 For any hotel proposal, demonstrates sufficient demand (Recommendation 06) and a visual and functional fit with the travel stop.

11.5 Next Steps and Recommended Studies

The first step is for Council to adopt this assessment and its recommendations as the direction for the 103 Property, aligned with the Hartz Point waterfront property strategy so both sites can start development together. The studies and specialist work below then carry the recommendations forward. Scope and budget for each are to be set by staff and Council; engineering studies should be carried out by qualified engineering firms.

Table 94: Next steps and recommended studies

When	Study or task	Purpose	Recommendation
First 90 days	Highway access business case	Make the case to Public Works for direct access and signage, with traffic, safety, and economic evidence, a draft Council resolution, and a ministerial briefing	Rec. 02
First 90 days	Economic and fiscal impact model	Estimate jobs, construction spending, and annual tax revenue by phase, updated as operators and formats are confirmed	Rec. 01, 08
First 90 days	Hartz Point and 103 Property alignment	A short joint strategy so the two municipal sites complement each other	Rec. 01
Year 1	Geotechnical, servicing, power, flood, wetland, and wildfire studies	Confirm what can be built and at what cost	Rec. 03
Year 1	Concept site plan with three funding scenarios	Settle layout, phasing, and funding before marketing	Rec. 01, 05
Year 1	Development agreement framework and investor package	Clear rules, a regulatory summary, anchor pitch sheets, and an Invest Nova Scotia listing	Rec. 04
Year 1	Operator market sounding and call for interest	Confidential conversations with fuel, food, and charging operators, then a local-first call for interest	Rec. 05
Year 1	EV charging funding application	Federal ZEVIP support with a charging partner	Rec. 05
Year 1	Incentive and land disposition policy	Phased taxation and cost-sharing modelled for Council; a buy-back clause	Rec. 08
Years 2 to 3	Retail leakage and tenant targeting study	Spending leakage by category and a named tenant list for the mixed-use cluster	Rec. 06
Years 3 to 4	Hotel feasibility study	Occupancy, rates, seasonality, and ferry sensitivity, tested against the 65% year-round benchmark	Rec. 06
Years 2 to 5	Health centre partnership business case	Service gaps for Nova Scotia Health and letters of interest from private tenants	Rec. 07
Ongoing	Progress monitoring	Quarterly Year 1 updates and annual reports to Council	All

11.6 Potential Investors by Node and Investor Attraction Strategy

The plan depends on private investors and public partners committing to each node. The table below lists the types of investors and named examples the Municipality should approach. Names are illustrative of who typically invests in each format; none has been approached or has committed.

Table 95: Potential investors and partners by node

Node	Operators and tenants	Developers and owners	Public and funding partners
Node 1: Highway gateway	Fuel and convenience: Irving/Circle K, Ultramar, Petro-Canada dealers, Co-op, Wilsons, Parkland. Food: the local Tim Hortons franchisee, A&W, Mary Brown's, Dairy Queen, McDonald's. EV charging: Nova Scotia Power, Tesla, FLO	Fuel operators on a ground lease; a Mi'kmaw First Nation development corporation as a joint-venture partner	Nova Scotia Public Works (access and signage); federal ZEVIP (charging); Invest Nova Scotia
Node 2: Mixed-use cluster	Retail: Dollarama, Giant Tiger, Sobeys or Co-op (small format), Home Hardware or Kent. Services: a bank or regional credit union, professional offices. Experiential tourism: local producers such as Boxing Rock and District 33, artisans, outfitters and tour operators	Regional commercial developers active in Shelburne, Yarmouth, and Bridgewater; Crombie REIT; local owner-builders	Invest Nova Scotia; Tourism Nova Scotia; ACOA business and tourism programs (eligibility to be confirmed)
Micro-hotel (if proven)	Franchisees of Hampton, Holiday Inn Express, Comfort Inn, Best Western, Microtel, and other Choice and Wyndham brands; local motel and inn owners	Hotel franchisee-developers	Tourism Nova Scotia (room-night data, marketing)
Node 3: Health and community campus	Nova Scotia Health (Western Zone) services; pharmacy (including local operators such as TLC Pharmasave); physiotherapy, dental, optometry, and audiology practices	Healthcare build-to-suit developers; Nova Scotia seniors' living operators for later phases	Nova Scotia Health; provincial recruitment programs

Investor attraction strategy. A small, focused strategy is enough at this stage. The steps below should start once the Year 1 studies and development agreement framework are under way.

1. **Get investment-ready.** Complete the site studies, the development agreement framework, and a concept site plan so investors can see what can be built, at what cost, and how quickly it can be approved.
2. **Prepare an investor package for each node.** A short prospectus for each node: the opportunity, key market numbers (trade area, traffic, spending, the service gap), site and servicing facts, the approval route, available incentives, and one contact.
3. **Build and rank a target list.** Start local and regional (businesses already in Shelburne County and the South Shore), then Atlantic operators, then national brands and franchisees. Prioritize Node 1 operators first.
4. **Use the right channels.** Direct outreach to operators' real estate and franchise development teams; a listing and introductions through Invest Nova Scotia; ACOA and Tourism Nova Scotia for tourism and business programs; and retail real estate networks for Node 2.
5. **Run a call for interest for each node.** A local-first call for interest for Node 1 in Year 1, then for Node 2 once Node 1 opens, with clear criteria for selecting partners.
6. **Have terms ready.** Agree in advance the incentives (phased taxation, servicing cost-sharing, fee rebates) and the land terms (ground lease or sale, milestones, buy-back clause), so the Municipality can respond quickly.
7. **Respond fast and follow up.** One staff contact, a published approvals timeline, and a commitment to answer investor questions within days.
8. **Track and report.** Keep a simple investor pipeline (contacted, interested, negotiating, committed) and report it to Council quarterly in Year 1.

12 Benefits and Provincial Partnership

12.1 Economic, Job, and Tax Revenue Benefits
12.2 Provincial Partnership and Negotiations

ASBB



Shelburne Harbour from the air

This section sets out what the plan delivers for the Municipality in jobs, economic growth, and tax revenue, and how the Municipality should work and negotiate with the Province. The next steps and recommended studies are in Section 11.5.

12.1 Economic, Job, and Tax Revenue Benefits

The 103 Property is undeveloped and brings in no tax revenue today. Every node in the plan changes that in three ways: it creates jobs, it keeps spending in Shelburne that now leaves for Yarmouth and Bridgewater, and it adds commercial assessment taxed at the commercial rate.

Table 96: Benefits by node

Node	Jobs	Economic growth	Tax revenue
Node 1: Highway stop and EV charging	Fuel, convenience, food service, and site maintenance; year-round	Captures spending from Highway 103 travellers; the region sees more than 180,000 overnight stops a year; county households spend $13.5 million a year on gasoline and $11.0 million at restaurants	First commercial assessment on the site
Node 2: Mixed-use cluster	Retail, café, banking, and professional office jobs	Keeps local spending here: 85.3% of residents now leave Shelburne for services, and county households spend $374.1 million a year	Each new shop pad or office building adds assessment
Micro-hotel (if demand is proven)	Front desk, housekeeping, and maintenance	Overnight stays and visitor spending in Shelburne	A further commercial building
Node 3: Health and community campus	Year-round, skilled health and care jobs	Helps keep families and attract workers and professionals; fewer trips out of town for care	Private tenants add assessment; publicly owned space depends on ownership

Tax revenue. New businesses on the 103 Property pay the commercial rate of $1.82 per $100 of assessment (to be confirmed against the current budget). The table below shows the scale of annual municipal revenue at different levels of new assessment. These are illustrations only: actual figures depend on what is built and how it is assessed, and are not forecasts.

Table 97: Illustrative annual municipal tax revenue from new commercial assessment

New commercial assessment	Annual municipal tax at $1.82 per $100
$1 million	About $18,200
$5 million	About $91,000
$10 million	About $182,000
$20 million	About $364,000

ASBB calculation. Illustrative only; excludes any phased taxation or incentives.

If Council offers phased taxation to attract operators, early tax bills are lower, but under the provincial cap the Municipality still collects at least half of the added revenue during the phase-in, as in Windsor and Bridgewater (Section 7.13). A larger commercial tax base helps fund the services residents asked for without relying only on residential taxes.

Jobs. This report does not forecast job numbers, because they depend on the operators and formats chosen. Comparable sites show the direction: each ONroute centre employs about 100 to 150 people at far higher traffic volumes (Section 7.11), and Antigonish County's Highway 104 exits now support a hotel, fuel stops, restaurants, and a travel centre. Jobs at the 103 Property would be local and largely year-round, which matters in a county where 28% of residents name limited jobs as a barrier to growth.

Wider benefits. Travellers who stop can be pointed to Sandy Point, the waterfront, and Hartz Point; health services and everyday shops give families reasons to stay; and a visible, growing node helps attract further investment.

12.2 Provincial Partnership and Negotiations

Several of the plan's most important decisions sit with the Province: direct highway access and signage, publicly funded health services, and support for investment attraction and EV charging. The plan is designed to fit provincial priorities, which strengthens the Municipality's position.

Table 98: How the plan aligns with provincial priorities

Provincial priority	How the 103 Property plan supports it
Clean Power Plan: 80% clean electricity by 2030	EV fast charging at the highway stop
Health: physician and nurse recruitment; new and replacement long-term care spaces	A health and community campus planned with Nova Scotia Health
Tourism: destination development and the Lighthouse Route	Traveller services, local products, visitor information, and a hotel if proven
Investment attraction through Invest Nova Scotia	A listed, investment-ready site with one point of contact
Climate goals: net-zero emissions by 2050 (EGCCRA)	Charging, energy-efficient buildings, and a compact mixed-use node

Table 99: Provincial partners and what to negotiate

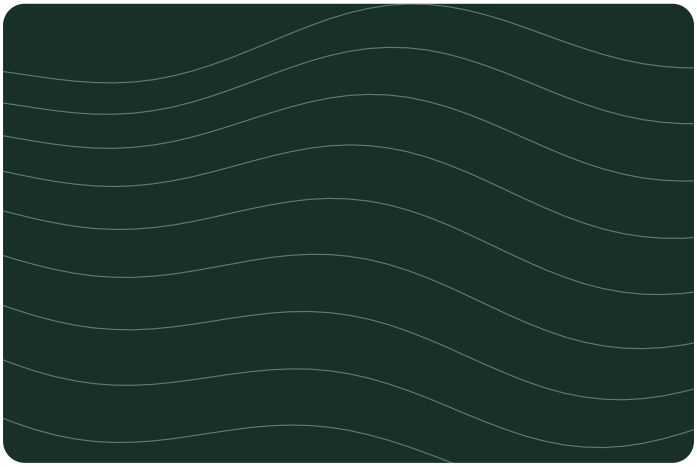
Partner	What the Municipality is asking for	What the Municipality brings	Timing
Nova Scotia Public Works	Direct access to Highway 103 near Exits 25 and 26; advance signage; traffic data; a place in the five-year highway plan	Traffic and collision evidence, Council's October 2023 Exit 26 safety letter, the economic case, land reserved for ramps, and a local-road access design	Year 1 to Year 3
Nova Scotia Health (Western Zone)	Publicly funded services at a health and specialist centre	2 to 4 acres at Woodlawn Drive, servicing, private tenants, and a build-to-suit model	Year 2 to Year 5
Invest Nova Scotia	Site listing and investor introductions	An investment-ready package and a single point of contact	Year 1
Tourism Nova Scotia	Visitor information, destination marketing, and room-night data for the hotel test	Traveller services at the stop and links to Sandy Point and the waterfront	Year 1 to Year 4
Nova Scotia Power and federal EV programs	Grid capacity and a charging partner; ZEVIP funding	A charging site on the one Highway 103 stretch with no fast charger	Year 1 to Year 2

Negotiation approach. The Municipality should approach the Province with evidence first and a clear fallback:

1. Build the evidence: traffic and truck counts at Exits 24 to 27, collision history, the service gap, and the economic and tax case in Section 12.1.
2. Meet Public Works technical staff early, before any formal request, to agree the scope of a traffic impact study.
3. Pass a Council resolution and request a meeting with the Minister, with the MLA's support.
4. Ask for the access works to be considered in the five-year highway plan, showing what the Municipality brings: reserved right-of-way, a site design ready for ramps, and willingness to discuss cost-sharing.
5. Present the health centre to Nova Scotia Health as a ready site that meets provincial recruitment and service goals, with private tenants already interested.
6. Keep a fallback: if direct access is deferred, proceed from Pells Road or Woodlawn Drive with advance signage, and keep the request active each year.

App. A Household Spending and Demographic Data





Calculation of the Top Five Areas of Household Spending

Household spending figures were taken from market assessment data and projections provided by Manifold, using the same method for Shelburne, Yarmouth, and Queens counties. The five largest current-consumption categories were identified by comparing the total annual spending reported for each broad category. Two calculations were completed for each category:

- **Spending per household** = total category spending ÷ total households
- **Share of current consumption** = total category spending ÷ annual current consumption × 100

Annual current consumption was used as the denominator because these categories represent goods and services consumed by households. Total annual household expenditure was not used because it also includes personal taxes, pension contributions, savings, and financial transfers.

Table A-1: Detailed calculation of top five spending areas

Spending area	Measure	Shelburne County	Yarmouth County	Queens County
Inputs	Total households	6,945	12,033	5,433
	Annual current consumption	$374,147,985	$665,051,877	$243,409,266
Housing and shelter	Total spending	$115,342,560	$207,725,679	$75,366,576
	Per household	$16,608	$17,263	$13,872
	Share of consumption	30.8%	31.2%	31.0%
Transportation	Total spending	$62,692,515	$108,682,056	$38,748,156
	Per household	$9,027	$9,032	$7,132
	Share of consumption	16.8%	16.3%	15.9%

Spending area	Measure	Shelburne County	Yarmouth County	Queens County
Food	Total spending	$61,407,690	$109,837,224	$40,546,479
	Per household	$8,842	$9,128	$7,463
	Share of consumption	16.4%	16.5%	16.7%
Household operations	Total spending	$32,537,325	$58,877,469	$21,655,938
	Per household	$4,685	$4,893	$3,986
	Share of consumption	8.7%	8.9%	8.9%
Recreation	Total spending	$20,960,010	$34,931,799	$13,218,489
	Per household	$3,018	$2,903	$2,433
	Share of consumption	5.6%	5.3%	5.4%
Combined top five	Sum of category totals	$292,940,100	$520,054,227	$189,535,638
	Share of consumption	78.3%	78.2%	77.9%

Table A-2: Household spending market overview

Measure	Shelburne	Queens	Yarmouth
Total households	6,945	5,433	12,033
Annual household expenditure	$468,488,865	$306,372,303	$834,259,923
Annual current consumption	$374,147,985	$243,409,266	$665,051,877

Table A-3: Summary of major spending categories

Category	Shelburne	Queens	Yarmouth
Food	$61,407,690	$40,546,479	$109,837,224
Shelter	$115,342,560	$75,366,576	$207,725,679
Household operation	$32,537,325	$21,655,938	$58,877,469
Furnishings and equipment	$12,195,420	$8,078,871	$21,731,598
Clothing	$14,028,900	$9,067,677	$25,425,729
Transportation	$62,692,515	$38,748,156	$108,682,056
Health care	$16,008,225	$10,898,598	$27,543,537
Personal care	$6,479,685	$4,063,884	$11,611,845
Recreation	$20,960,010	$13,218,489	$34,931,799
Reading materials	$812,565	$548,733	$1,468,026

Category	Shelburne	Queens	Yarmouth
Education	$8,493,735	$5,481,897	$15,835,428
Tobacco and alcoholic beverages	$9,973,020	$6,628,260	$17,941,203
Games of chance	$6,882,495	$4,498,524	$11,274,921
Miscellaneous expenditures	$6,736,650	$4,585,452	$11,828,439
Taxes	$56,080,875	$38,395,011	$101,642,751
Insurance and pension contributions	$26,793,810	$16,782,537	$47,903,373
Contributions to RRSP	$10,861,980	$7,752,891	$19,096,371
Gifts, support payments, and charitable contributions	$11,459,250	$7,780,056	$19,661,922
Grocery (included within Food)	$49,538,685	$32,929,413	$88,225,956

Table A-4: Food

Spending item	Shelburne	Queens	Yarmouth
Total food	$61,407,690	$40,546,479	$109,837,224
↳ Food purchased from stores	$50,372,085	$33,483,579	$89,693,982
↳↳ Locally and on day trips	$49,976,220	$33,206,496	$88,996,068
↳↳↳ Supermarkets	$39,044,790	$25,861,080	$69,430,410
↳↳↳ Specialty stores	$2,882,175	$1,950,447	$4,981,662
↳↳↳ Convenience stores	$4,583,700	$3,064,212	$8,062,110
↳↳↳ Other stores	$3,472,500	$2,287,293	$6,521,886
↳↳↳ Online or delivery from stores	$0	$43,464	$0
↳↳ While on trips overnight or longer	$395,865	$260,784	$697,914
↳ Board paid to private households	$55,560	$21,732	$385,056
↳ Food purchased from restaurants	$10,973,100	$7,046,601	$19,758,186
↳↳ Restaurant meals	$9,757,725	$6,182,754	$17,411,751
↳↳ Restaurant snacks and beverages	$1,222,320	$863,847	$2,346,435

Table A-5: Shelter

Spending item	Shelburne	Queens	Yarmouth
Total shelter	$115,342,560	$75,366,576	$207,725,679
↳ Principal accommodation	$96,604,950	$64,196,328	$177,787,575

Spending item	Shelburne	Queens	Yarmouth
↳↳ Rented living quarters	$14,126,130	$9,366,492	$32,705,694
↳↳↳ Rent	$13,799,715	$9,149,172	$31,959,648
↳↳ Owned living quarters	$60,185,370	$39,785,859	$105,048,090
↳↳↳ Regular mortgage payments	$29,169,000	$18,081,024	$52,126,956
↳↳↳ Maintenance, repairs, and replacements	$7,340,865	$4,802,772	$11,996,901
↳↳↳ Condominium charges	$7,146,405	$4,862,535	$12,345,858
↳↳↳ Property taxes	$6,701,925	$5,454,732	$11,768,274
↳↳↳ Homeowners insurance premiums	$7,556,160	$5,068,989	$12,754,980
↳↳ Water, fuel, and electricity	$22,265,670	$15,011,379	$39,805,164
↳ Other accommodation	$11,084,220	$6,269,682	$17,339,553
↳↳ Traveller accommodation	$2,333,520	$1,667,931	$4,235,616
↳ Additions, renovations, and alterations	$7,076,955	$4,525,689	$11,647,944
↳ New installations of equipment and fixtures	$576,435	$369,444	$950,607

Table A-6: Household operation

Spending item	Shelburne	Queens	Yarmouth
Total household operation	$32,537,325	$21,655,938	$58,877,469
↳ Communications	$16,105,455	$10,925,763	$29,902,005
↳↳ Telephone	$10,445,280	$6,568,497	$18,795,546
↳↳↳ Telephones and equipment	$555,600	$353,145	$1,010,772
↳↳↳ Landline telephone service	$2,541,870	$1,705,962	$4,416,111
↳↳↳ Cellular services	$7,347,810	$4,509,390	$13,356,630
↳↳ Internet services	$5,326,815	$4,134,513	$10,528,875
↳↳↳ Online services	$562,545	$434,640	$1,131,102
↳ Child care expenses	$1,639,020	$994,239	$3,224,844
↳↳ Child care outside the home	$1,083,420	$641,094	$2,105,775
↳↳↳ Day-care centres	$798,675	$461,805	$1,407,861
↳↳↳ Other child care outside the home	$277,800	$179,289	$709,947
↳↳ Child care in the home	$555,600	$353,145	$1,119,069

Spending item	Shelburne	Queens	Yarmouth
↳ Domestic and other custodial services	$1,007,025	$679,125	$1,829,016
↳ Pet expenses	$5,368,485	$3,509,718	$9,072,882
↳↳ Pet food	$2,437,695	$1,597,302	$4,115,286
↳↳ Purchase of pets	$576,435	$369,444	$974,673
↳↳ Pet-related goods	$423,645	$309,681	$673,848
↳↳ Veterinarian and other services	$1,937,655	$1,233,291	$3,309,075
↳ Household cleaning supplies	$1,263,990	$814,950	$2,274,237
↳ Paper, plastic, and foil supplies	$2,277,960	$1,461,477	$4,079,187
↳ Garden supplies and services	$3,458,610	$2,330,757	$5,980,401
↳↳ Nursery stock, flowers, and plants	$1,152,870	$749,754	$2,033,577
↳↳ Fertilizers, soil, and soil conditioners	$513,930	$336,846	$890,442
↳↳ Pesticides	$180,570	$124,959	$336,924
↳↳ Horticultural, snow, and garbage removal	$1,611,240	$1,113,765	$2,719,458

Table A-7: Furnishings and equipment

Spending item	Shelburne	Queens	Yarmouth
Total household furnishings and equipment	$12,195,420	$8,078,871	$21,731,598
↳ Household furnishings	$4,354,515	$2,895,789	$8,074,143
↳↳ Furniture	$3,208,590	$2,140,602	$6,088,698
↳↳ Rugs, mats, and underpadding	$208,350	$135,825	$373,023
↳↳ Window coverings and household textiles	$520,875	$358,578	$890,442
↳↳ Art, antiques, and decorative ware	$416,700	$266,217	$721,980
↳ Household equipment	$6,951,945	$4,552,854	$12,189,429
↳↳ Household appliances	$2,500,200	$1,662,498	$4,512,375
↳↳ Home and workshop tools and equipment	$882,015	$565,032	$1,480,059
↳↳↳ Power tools and equipment	$576,435	$374,877	$926,541
↳↳ Lawn, garden, and snow-removal equipment	$763,950	$483,537	$1,263,465
↳↳ Home security equipment	$250,020	$168,423	$409,122
↳ Maintenance and repairs of furniture and equipment	$340,305	$271,650	$505,386

Spending item	Shelburne	Queens	Yarmouth
↳ Services related to furnishings and equipment	$548,655	$364,011	$962,640

Table A-8: Clothing

Spending item	Shelburne	Queens	Yarmouth
Total clothing	$14,028,900	$9,067,677	$25,425,729
↳ Women's and girls' wear (4 years and over)	$8,306,220	$5,405,835	$14,704,326
↳↳ Clothing	$4,201,725	$2,749,098	$7,448,427
↳↳ Footwear	$1,354,275	$885,579	$2,418,633
↳↳ Accessories	$354,195	$228,186	$637,749
↳↳ Jewellery and watches	$590,325	$385,743	$1,046,871
↳ Men's and boys' wear (4 years and over)	$5,340,705	$3,417,357	$9,987,390
↳↳ Clothing	$2,791,890	$1,782,024	$5,246,388
↳↳ Footwear	$1,027,860	$651,960	$1,949,346
↳↳ Accessories	$180,570	$114,093	$348,957
↳↳ Jewellery and watches	$138,900	$86,928	$252,693
↳ Children's wear (under 4 years)	$208,350	$114,093	$397,089
↳ Clothing services	$166,680	$130,392	$324,891

Table A-9: Transportation

Spending item	Shelburne	Queens	Yarmouth
Total transportation	$62,692,515	$38,748,156	$108,682,056
↳ Private transportation	$56,810,100	$34,901,592	$97,828,290
↳↳ Purchase of automobiles and trucks	$20,869,725	$12,300,312	$34,125,588
↳↳ Automotive accessories	$423,645	$260,784	$746,046
↳↳ Rented automobiles and trucks	$166,680	$157,557	$385,056
↳↳ Operation of owned and leased vehicles	$33,731,865	$20,672,565	$58,949,667
↳↳↳ Gasoline and other fuels	$13,501,080	$7,981,077	$23,139,459
↳↳↳ Tires, batteries, parts, and supplies	$3,201,645	$2,059,107	$5,787,873
↳↳↳ Maintenance and repair	$6,646,365	$4,014,987	$11,527,614
↳↳↳ Garage rent and parking	$812,565	$510,702	$1,455,993

Spending item	Shelburne	Queens	Yarmouth
↳↳↳ Car insurance premiums	$7,125,570	$4,541,988	$12,767,013
↳ Public transportation	$5,882,415	$3,846,564	$10,853,766
↳↳ Local and commuter transportation	$1,889,040	$1,211,559	$3,561,768
↳↳ Inter-city transportation	$2,840,505	$1,852,653	$5,234,355

Table A-10: Health care

Spending item	Shelburne	Queens	Yarmouth
Total health care	$16,008,225	$10,898,598	$27,543,537
↳ Direct costs to household	$11,042,550	$7,611,633	$19,601,757
↳↳ Health care supplies	$236,130	$168,423	$625,716
↳↳ Medicinal and pharmaceutical products	$5,250,420	$3,591,213	$9,181,179
↳↳↳ Prescribed medicines	$3,139,140	$2,108,004	$5,571,279
↳↳↳ Cannabis for medical use	$90,285	$59,763	$168,462
↳↳ Physicians' care	$2,014,050	$1,385,415	$3,549,735
↳↳ Eye-care goods and services	$854,235	$565,032	$1,504,125
↳↳ Dental services	$1,347,330	$950,775	$2,382,534
↳↳ Hospital care	$125,010	$65,196	$180,495
↳ Health insurance premiums	$4,958,730	$3,286,965	$7,941,780
↳↳ Public hospital, medical, and drug plans	$1,236,210	$744,321	$1,696,653
↳↳ Private health insurance plans	$3,729,465	$2,542,644	$6,245,127

Table A-11: Personal care

Spending item	Shelburne	Queens	Yarmouth
Total personal care	$6,479,685	$4,063,884	$11,611,845
↳ Personal care supplies and equipment	$4,354,515	$2,683,902	$7,809,417
↳↳ Personal care preparations	$1,687,635	$1,021,404	$2,972,151
↳↳ Electric hair-styling and personal care appliances	$201,405	$103,227	$421,155
↳ Personal care services	$2,118,225	$1,379,982	$3,802,428
↳↳ Hair grooming	$1,743,195	$1,140,930	$3,128,580

Table A-12: Recreation

Spending item	Shelburne	Queens	Yarmouth
Total recreation	$20,960,010	$13,218,489	$34,931,799
↳ Recreation equipment and services	$7,243,635	$4,471,359	$12,369,924
↳↳ Sports and athletic equipment	$722,280	$402,042	$1,203,300
↳↳ Toys, electronic games, and hobby materials	$1,055,640	$651,960	$1,636,488
↳↳ Computer equipment and supplies	$2,604,375	$1,678,797	$4,741,002
↳↳ Photographic goods and services	$701,445	$418,341	$1,239,399
↳↳ Camping and picnic equipment	$430,590	$249,918	$697,914
↳ Recreation vehicles and services	$4,542,030	$2,787,129	$6,425,622
↳↳ Purchase of recreation vehicles	$2,854,395	$1,814,622	$3,898,692
↳↳ Operation of recreation vehicles	$1,687,635	$972,507	$2,526,930
↳ Home entertainment equipment and services	$1,069,530	$689,991	$1,997,478
↳ Recreation services	$8,097,870	$5,270,010	$14,138,775
↳↳ Entertainment	$4,444,800	$2,955,552	$8,001,945
↳↳↳ Admission to museums and other activities	$277,800	$184,722	$529,452
↳↳↳ Cablevision and satellite services	$3,868,365	$2,580,675	$6,882,876
↳↳ Use of recreation facilities	$1,590,405	$967,074	$2,719,458
↳↳ Package travel tours	$1,743,195	$1,184,394	$2,960,118

Table A-13: Other spending categories

Spending item	Shelburne	Queens	Yarmouth
Reading materials and other printed matter	$812,565	$548,733	$1,468,026
Education	$8,493,735	$5,481,897	$15,835,428
↳ Education supplies and textbooks	$1,305,660	$977,940	$3,080,448
↳ Tuition fees	$6,806,100	$4,275,771	$12,093,165
↳↳ University tuition	$4,778,160	$3,020,748	$8,507,331
↳↳ College, trade, and professional tuition	$1,736,250	$1,070,301	$3,044,349
Tobacco products and alcoholic beverages	$9,973,020	$6,628,260	$17,941,203
↳ Tobacco products and smokers' supplies	$3,146,085	$2,184,066	$5,860,071
↳ Alcoholic beverages	$6,833,880	$4,444,194	$12,081,132

Spending item	Shelburne	Queens	Yarmouth
↳↳ Served on licensed premises	$2,611,320	$1,705,962	$4,692,870
↳↳ Purchased from stores	$4,021,155	$2,575,242	$7,087,437
Games of chance (net)	$6,882,495	$4,498,524	$11,274,921
Miscellaneous expenditures	$6,736,650	$4,585,452	$11,828,439
↳ Financial services	$4,750,380	$3,270,666	$8,182,440
Personal taxes	$56,080,875	$38,395,011	$101,642,751
Personal insurance and pension contributions	$26,793,810	$16,782,537	$47,903,373
↳ Retirement and pension fund payments	$19,571,010	$11,974,332	$34,907,733
Registered retirement savings plans	$10,861,980	$7,752,891	$19,096,371
Gifts of money and contributions	$11,459,250	$7,780,056	$19,661,922
↳ Contributions to charity	$4,007,265	$2,705,634	$6,714,414

Table A-14: Grocery product breakdown

Spending item	Shelburne	Queens	Yarmouth
Total grocery	$49,538,685	$32,929,413	$88,225,956
↳ Dairy products and eggs	$7,111,680	$4,753,875	$12,610,584
↳ Bakery	$5,250,420	$3,520,584	$9,313,542
↳ Cereal grains and cereal products	$2,903,010	$1,896,117	$5,210,289
↳ Fruit and nuts	$4,729,545	$3,129,408	$8,411,067
↳ Vegetables	$4,792,050	$3,178,305	$8,519,364
↳ Meat	$10,493,895	$6,975,972	$18,627,084
↳ Fish and other marine products	$1,152,870	$755,187	$2,081,709
↳ Non-alcoholic beverages and other food	$13,112,160	$8,714,532	$23,452,317
↳↳ Non-alcoholic beverages	$4,021,155	$2,613,273	$7,255,899
↳↳ Other foods and food preparations	$9,084,060	$6,101,259	$16,196,418

Table A-15: Demographic summary

Attribute	Shelburne County	Yarmouth County	Queens County
Total population	14,303	26,432	11,017
Population age 15 and over	12,467	22,893	9,895

Attribute	Shelburne County	Yarmouth County	Queens County
Private households	6,945	12,033	5,433
Average persons per household	2.03	2.16	1.99
Census families in private households	4,476	7,887	3,401
Average persons per census family	2.54	2.64	2.52
Labour force age 15 and over	7,124	13,541	4,676
Land area	2,462.58 km^2	2,121.64 km^2	2,393.44 km^2
Inhabited area	1,140.36 km^2	899.96 km^2	1,585.82 km^2

Table A-16: Dwellings and housing tenure

Attribute	Shelburne County	Yarmouth County	Queens County
Occupied private dwellings	6,945	12,033	5,433
Average dwelling value	$278,919	$282,291	$341,502
Homeowners	5,615 (80.9%)	9,111 (75.7%)	4,490 (82.6%)
Tenants	1,331 (19.2%)	2,852 (23.7%)	918 (16.9%)
Band housing	0 (0.0%)	70 (0.6%)	25 (0.5%)
One-family households	4,404 (63.4%)	7,623 (63.4%)	3,371 (62.1%)
Multiple-family households	108 (1.6%)	231 (1.9%)	88 (1.6%)

Table A-17: Average income

Income measure	Shelburne County	Yarmouth County	Queens County
Average family income	$95,787	$101,575	$91,899
Average household income	$78,643	$83,543	$76,914
Average income, population 15+	$44,563	$45,637	$42,789

Table A-18: Population by individual income range

Income range	Shelburne	Share	Yarmouth	Share	Queens	Share
Under $10,000 (incl. losses)	963	7.7%	1,629	7.1%	885	8.9%
$10,000–$19,999	1,734	13.9%	3,236	14.1%	1,539	15.6%
$20,000–$29,999	2,381	19.1%	4,556	19.9%	1,891	19.1%
$30,000–$39,999	1,764	14.2%	3,504	15.3%	1,581	16.0%

Income range	Shelburne	Share	Yarmouth	Share	Queens	Share
$40,000–$49,999	1,601	12.8%	2,711	11.8%	1,246	12.6%
$50,000–$59,999	1,091	8.8%	1,981	8.7%	775	7.8%
$60,000–$69,999	750	6.0%	1,281	5.6%	530	5.4%
$70,000–$79,999	584	4.7%	999	4.4%	369	3.7%
$80,000–$89,999	458	3.7%	727	3.2%	233	2.4%
$90,000–$99,999	260	2.1%	487	2.1%	140	1.4%
$100,000–$149,999	486	3.9%	805	3.5%	279	2.8%
$150,000 and over	128	1.0%	318	1.4%	112	1.1%

Table A-19: Annual growth-rate projections

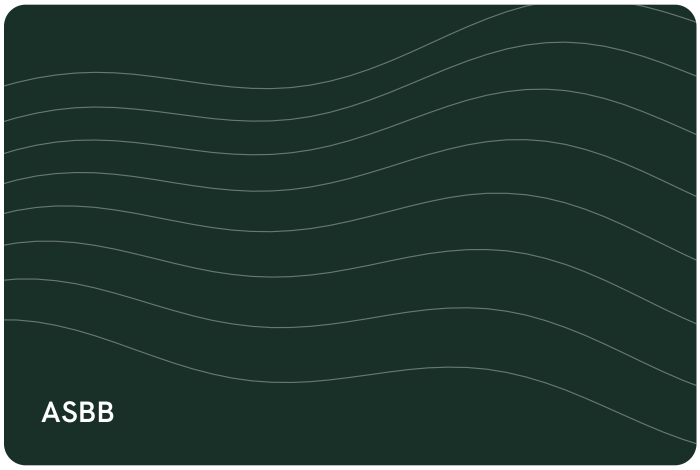
Period and measure	Shelburne County	Yarmouth County	Queens County
Next 3 years: population	0.30%	0.70%	0.53%
Next 3 years: households	0.81%	1.04%	1.22%
Next 3 years: families	0.34%	0.70%	0.58%
Next 5 years: population	0.39%	0.74%	0.60%
Next 5 years: households	0.87%	1.08%	1.23%
Next 5 years: families	0.42%	0.74%	0.63%
Years 5–10: population	0.34%	0.65%	0.52%
Years 5–10: households	0.76%	0.94%	1.07%
Years 5–10: families	0.37%	0.65%	0.56%

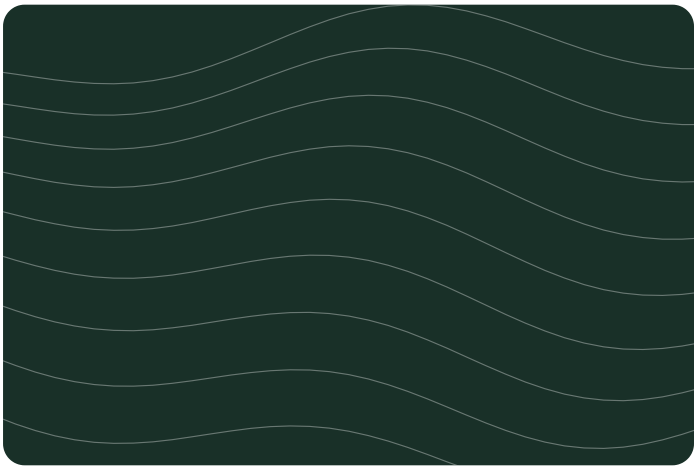
Table A-20: Population, household, family, and income projections

Measure	Shelburne County	Yarmouth County	Queens County
Population: current	14,303	26,432	11,017
Population: 3-year	14,431	26,989	11,195
Population: 5-year	14,581	27,425	11,349
Population: 10-year	14,831 (+3.7%)	28,329 (+7.2%)	11,649 (+5.7%)
Households: current	6,945	11,963	5,409
Households: 3-year	7,116	12,414	5,634
Households: 5-year	7,253	12,695	5,775

Measure	Shelburne County	Yarmouth County	Queens County
Households: 10-year	7,534 (+8.5%)	13,304 (+11.2%)	6,090 (+12.6%)
Census families: current	4,476	7,887	3,401
Census families: 10-year	4,656 (+4.0%)	8,454 (+7.2%)	3,609 (+6.1%)
Avg. household income: current	$78,643	$83,543	$76,914
Avg. household income: 3-year	$81,980	$88,852	$82,163
Avg. household income: 5-year	$86,760	$96,286	$89,497
Avg. household income: 10-year	$93,749 (+19.2%)	$108,496 (+29.9%)	$101,529 (+32.0%)

App. B Conferences and Investors to Approach





Dates and venues were checked against each organizer's own page in October 2026, except where marked "to be confirmed." Events are listed in order of fit with the anchor hierarchy, starting with those that serve the primary anchor. Contact details for the organizations below have not been verified and should be confirmed before outreach.

Table B-1: Conferences and events for attracting investment

Event	Date and location	Who attends	Relevance to the 103 Property	Timing and status
NACS Show	October 6–9, 2026, Las Vegas Convention Center. One listing shows the 2027 edition in Atlanta in October.	Fuel and convenience retailers, dealers, suppliers, EV charging providers	Primary anchor: fuel and convenience operators and charging providers in one place.	In progress now. Plan for 2027 and confirm dates and city.
EVVE (Electric Mobility Canada)	October 20–22, 2026, Fort Garry Hotel, Winnipeg	About 400 participants: automakers, utilities, charging operators, fleets, governments	Primary anchor: charging hub partners, utility contacts, and funding program staff.	Soon. Consider 2026 or the 2027 edition (dates to be confirmed).
ICSC@Whistler	January 24–26, 2027, Fairmont Chateau Whistler, BC	Retailers, developers, brokers, landlords	Retail cluster: small-format discount, quick-service, and service tenants and their brokers.	Confirmed. Best used once access and servicing information exist.
CFA National Convention	April 17–19, 2027, Sheraton Fallsview, Niagara Falls, ON	Franchisors, franchisees, suppliers	Primary anchor and retail: quick-service and fuel brands that expand through franchisees.	Confirmed. Suited to Phase 1 quick-service discussions.

Event	Date and location	Who attends	Relevance to the 103 Property	Timing and status
Canadian Hotel Investment Conference	Toronto; 2027 dates to be confirmed	Hotel owners, investors, brands, lenders	Conditional micro-hotel only.	Low priority until demand is demonstrated.
Atlantic Venture Forum	June 7–8, 2027, Halifax Convention Centre	Atlantic Canadian entrepreneurs and investors	Regional investor contacts; a weaker fit for land and real estate.	Confirmed. Optional.
Invest Canada '27	June 1–3, 2027, JW Parq Marriott, Vancouver	VC, private equity, pension funds, family offices	Large-scale private capital; a weaker fit until a defined package exists.	Confirmed. Low priority.
TIANS Tourism Summit	November 30 – December 1, 2027, Westin Nova Scotian, Halifax	Nova Scotia tourism operators and organizations	Conditional micro-hotel and visitor demand; signage and tourism policy contacts.	Confirmed. Relevant to the Phase 2 hotel decision.
Invest Nova Scotia events and missions	Ongoing (investnovascotia.ca/calendar)	Provincial investment staff, exporters, investors	Investor introductions and inclusion in provincial promotion.	Ongoing. Ask for a meeting rather than waiting for an event.

Several other events fit the plan but their 2027 dates were not confirmed: the Restaurants Canada Show (Toronto), the Economic Developers Association of Canada annual conference, and the 2027 Electric Mobility Canada conference. The Province showcased 20 Nova Scotia projects at the Canada Investment Summit in September 2026, and the Municipality should ask whether the 103 Property could be included in similar future showcases.

Table B-2: Operators, investors, and funders to approach

Organization	Why approach	Anchor and phase	Suggested route
Irving Oil / Circle K	Dominant Atlantic fuel brand with highway travel-centre formats.	Travel stop; Phase 1	Direct contact; NACS Show
Wilsons Gas Stops	Nova Scotia family-owned fuel operator active in rural markets.	Travel stop; Phase 1	Direct contact
Suncor (Petro-Canada) dealer network	Own EV network and highway focus.	Travel stop; Phase 1	Direct contact; NACS Show
Parkland (Esso / On the Run)	Dealer model suits independent local owners.	Travel stop; Phase 1	Direct contact; NACS Show
Nova Scotia Power (EV network)	The corridor gap is visible on its charging map; key contact for electrical capacity.	EV charging; Phase 1	Direct contact; EVVE
Tesla Supercharger site team and FLO	Already serve Yarmouth and Digby, with a corridor gap near Shelburne.	EV charging; Phase 1	Direct contact; EVVE

Organization	Why approach	Anchor and phase	Suggested route
McDonald's Canada real estate and the Barrington Passage franchisee	No Shelburne store exists.	Quick-service; Phase 1	Direct contact; CFA Convention
Tim Hortons (RBI) and the Shelburne franchisee	Manage a relocation or second unit rather than create a competitor.	Quick-service; Phase 1	Direct contact
A&W, Mary Brown's, Dairy Queen, Pizza Delight (Foodtastic)	Present in Yarmouth or Barrington Passage but not Shelburne.	Quick-service; Phases 1–2	CFA Convention
Dollarama and Giant Tiger real estate	Small-format discount gap in Shelburne County.	Retail cluster; Phase 2	ICSC@Whistler; direct contact
Crombie REIT	Sobeys-affiliated; knows the Shelburne Mall and regional grocery-anchored retail.	Retail cluster; Phase 2	Direct contact
Choice Hotels Canada, Wyndham, Best Western	Limited-service brands franchising in small Atlantic markets.	Micro-hotel; Phase 2	CHIC; TIANS Summit
First Nation development corporations (e.g., Membertou, Glooscap)	Have built highway nodes in Nova Scotia; explore a joint venture.	Travel stop and retail; Phases 1–2	Direct contact
Boxing Rock Brewery and District 33 Winery	A highway-visible taproom or outlet would give the node a local identity.	Retail cluster; Phase 2	Direct contact
Nova Scotia Public Works	Decides highway access, signage, and traffic data; the first contact for the primary anchor.	Highway access; Foundation year	Formal request (Section 11.3)
Nova Scotia Health and the Province	A partner is required before a health centre can proceed.	Health centre; Phase 3	Direct contact
Natural Resources Canada (ZEVIP), Invest Nova Scotia, ACOA	Possible funding and introductions for charging infrastructure and site promotion.	EV charging; Foundation year and Phase 1	Direct contact; Invest Nova Scotia events

Photography: images of Shelburne and area supplied by the Municipality and the project team.

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Figures reflect information available at the time of writing. Third-party information should be confirmed with its source before decisions rely on it.

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