

ASBB
Economics & Research

Prepared for the Municipality of the District of Shelburne

Market and Investment Readiness Analysis

Market Readiness Assessment — Summary Report

Summary Report | October 2026 | Final report

Humanizing Economics

ASBB Economics & Research Ltd.

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About This Summary

This summary condenses the full Market and Investment Readiness Analysis for the 103 Property, prepared by ASBB Economics and Research Ltd. for the Municipality of the District of Shelburne. It sets out what we found, what we recommend, and what the Municipality should do first. Supporting data, methods, case studies, and detailed action tables are in the full report.

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.

01 The Site and the Question

1.1 The 103 Property
1.2 What We Set Out to Answer

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Shelburne's historic waterfront and harbour

1.1 The 103 Property

The 103 Property is approximately 284 acres across two adjacent, undeveloped, municipally owned parcels beside Highway 103 between Exits 25 and 26: Property 1 on Woodlawn Drive (PID 80113889) and Property 2 on Pells Road (PID 80143555). The Municipality acquired the land in 2024, alongside the 558-acre Hartz Point property, as a strategic economic development opportunity.

284
acres across two municipally owned parcels

$118,500
combined 2025 assessed value (resource exempt)

0
direct connections to Highway 103 today

1 hour
Shelburne sits at the midpoint of the Bridgewater–Yarmouth gap

Strengths. Highway frontage on the main South Shore corridor; municipal ownership that simplifies land assembly; undeveloped land that can be planned comprehensively; and nearby industrial, marine, broadband, and power infrastructure.

Constraints. No direct highway access (the lands are reached from Woodlawn Drive and Pells Road, which can serve development if direct access is not approved); no confirmed on-site servicing; and no site-specific flood, wetland, or coastal hazard determination. **Planning.** The lands are within a Special Planning Area, which allows Council to consider any type of development through a development agreement, so no rezoning is required.



Marine industrial infrastructure on Shelburne Harbour



Shelburne Harbour from the air

1.2 What We Set Out to Answer

Which uses can realistically succeed on the 103 Property, in what order, and what the Municipality must do to make the site ready for investment. We combined a community, economic, and consumer profile; two surveys, interviews, and consultation sessions; a retail market gap analysis; a scan of comparable jurisdictions in Nova Scotia, New Brunswick, Ontario, and Alberta; and a weighted decision-making matrix.

02 What We Found

2.1 An Aging Community That Wants to Be More Self-Sufficient
2.2 A Real but Small Retail Market
2.3 Where Demand Is Strongest
2.4 What Comparable Places Teach Us

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Market day on the historic waterfront

2.1 An Aging Community That Wants to Be More Self-Sufficient

Shelburne County's population is 14,303, growing slowly (about 0.3% a year), with 28.6% aged 65 or older. Projected household income growth over ten years (19.2%) is the flattest of the three neighbouring counties, and post-secondary attainment trails Yarmouth and Queens.

85.3%
of survey respondents regularly leave Shelburne for services and amenities

55.9%
rate local access to healthcare as poor

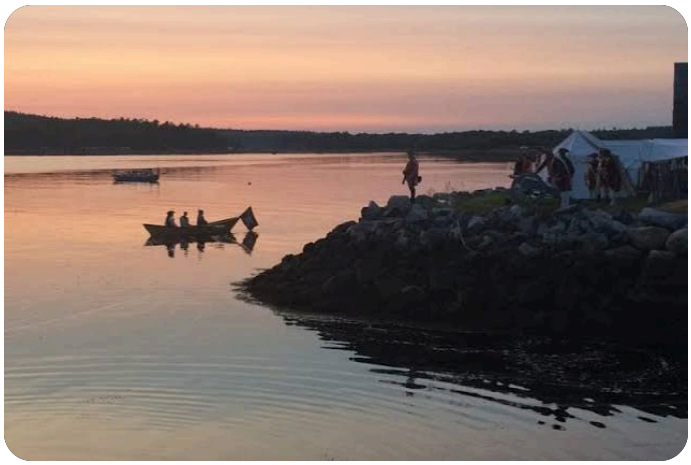
28%
name limited jobs as a key barrier to growth

56%
travel outside Shelburne to shop for goods

Residents value Shelburne's natural beauty, safety, heritage, and small-town character, and want growth that creates jobs and improves services without losing that character. Housing was consistently identified as the structural constraint behind workforce, business, and population growth; it is being addressed through the Municipality's own mixed-use plan and is not recommended as an anchor for this site.



A community festival on the harbour



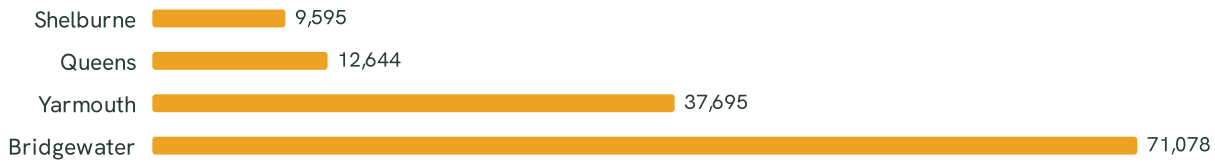
Heritage re-enactment on the harbour at dusk

2.2 A Real but Small Retail Market

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 primary, secondary, and tertiary areas, from the most to the least regular customers. Retailers use the size of the trade area, and how much its households spend, to decide whether a location can support a store.

Households in Shelburne County spend almost as much as Yarmouth households ($53,873 a year versus $55,269), but there are far fewer of them. The realistic retail trade area is about 9,595 people, a quarter of Yarmouth's and a seventh of Bridgewater's.

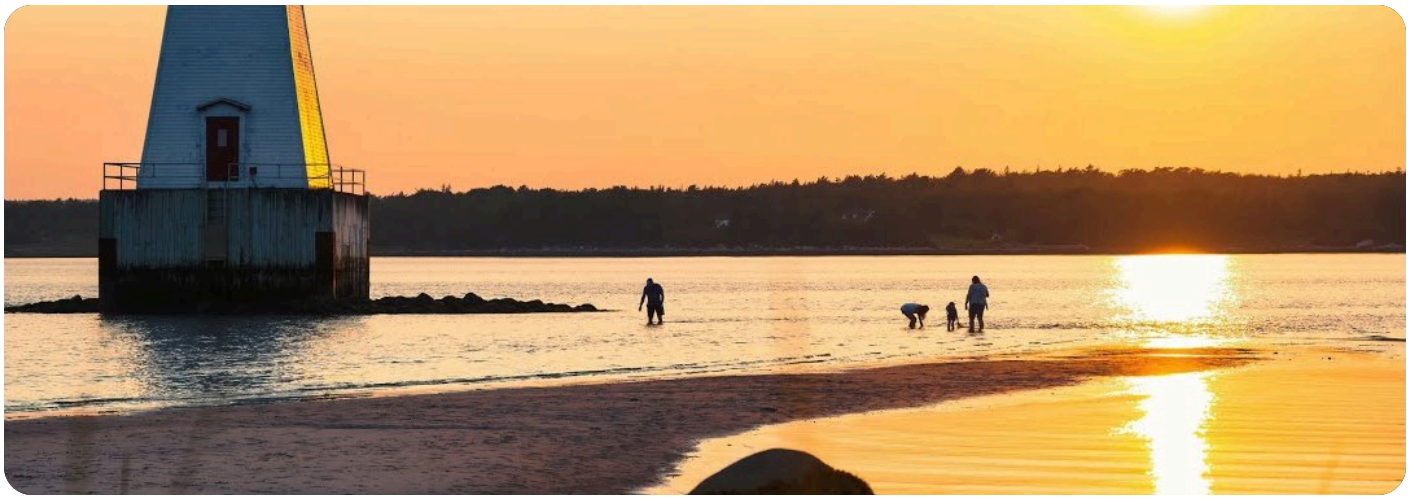


Contribution-weighted trade-area population. Bridgewater figure from the Town's 2025 retail study.

Table 1: Shelburne's retail market readiness

Condition	Rating	Assessment
Trade-area size	Poor	About 9,595 people: a major constraint for supermarkets and large-format stores.
Customer concentration and access	Adequate	Customers are dispersed (12.5 residents per inhabited km^2 versus 29.4 in Yarmouth), favouring accessible sites and smaller formats.
Growth outlook	Adequate	Population, households, and income are growing, but gradually.
Spending and market capture	Adequate	$374.1M in annual consumption, but a significant share leaves the county.

Shelburne is positioned for right-sized retail, not large formats: Yarmouth's Starrs Road and Bridgewater's South Shore Centre already hold the discount, hardware, auto, and apparel stores residents travel for.



Sandy Point Lighthouse

How the cluster can grow the market. The small trade area shows where to start, not where to stop. Step 1, today: a small grocer, value store, café or bakery, bank or credit union, and quick-service food. Step 2, add travellers: the highway stop brings in visitors on top of local shoppers, supporting more food brands, local products, and a hotel if proven. Step 3, grow and keep spending: households grow about 8.5% over ten years and spending now made elsewhere stays here, opening the door to offices, pharmacy, building supply, and more shop pads.

2.3 Where Demand Is Strongest

Table 2: Demand indicators by sector

Sector	Evidence
Highway travellers	Over 180,000 direct overnight stops a year in the region. Local spending on gasoline ($13.5M), restaurants ($11.0M), and recreational vehicles ($4.5M). Nova Scotia Power's fast-charging network lists no site between Liverpool and Yarmouth, and Shelburne's only national quick-service brands are a Tim Hortons and a Subway, both in town.
Healthcare	Seniors are the largest age group (28.57%); 55.9% rate healthcare access poor; the Province is investing in recruitment and long-term care. Delivery depends on a provincial partner.
Retail	Demand exists but suits small-format, value-oriented stores; neither Dollarama nor Giant Tiger has a store in Shelburne County.
Accommodation	Only 4 hotels and motels and 4 inns, against 61 cottages and 71 Airbnb listings, and no branded hotel. Bridgewater's study supports a 20- to 40-room boutique hotel at 66% occupancy, but this is a benchmark, not proof of demand at the site.

Demand is strongest where it draws on both residents and travellers, and weakest for large-format retail.

2.4 What Comparable Places Teach Us

The jurisdictional scan (Glooscap Landing, Caledon, High River, North Caledonia, Lacombe County, Milton, Windsor, Halifax, Bridgewater, Moncton, Ontario's ONroute, and Antigonish County) points to the same lessons:

- **Location is not enough.** Successful sites pair a clear plan with demonstrated demand.
- **Infrastructure decides feasibility.** Glooscap Landing and High River were only feasible with servicing financed; North Caledonia needed alternative financing models.
- **Phase it.** Early, privately delivered uses generate traffic and revenue for later phases.



Lobster traps and an inshore fishing boat

- **Highway stops work best with direct access and signage,** both provincial decisions in Nova Scotia; where direct access is not available, signage and a short local-road route matter most.
- **Start with local relationships.** Moncton's growth came from a proactive, relationship-first economic development team and a disposition policy with a reacquisition clause.
- **Small municipalities share cost and risk** through phased taxation, cost-sharing, and fee incentives rather than expanding their capital plans.

A close Nova Scotia example: Antigonish County. On Highway 104, the County used development agreements to grow a Microtel hotel with EV charging and a larger commercial development at Nova Landing, serviced lots and a proposed gas station and restaurant at Beech Hill Business Park (Exit 33), and Paqtnkek Mi'kmaw Nation's $11 million Bayside Travel Centre at Exit 36-B. It shows that a rural Nova Scotia municipality can attract a hotel, fuel, and food at its exits through development agreements and serviced land.

03 What We Recommend

3.1 Four Anchors, in Order
3.2 What the First Phase Looks Like
3.3 The Four Anchors at a Glance
3.4 One Mixed-Use Node, Built in Three Parts
3.5 Implementation Plan by Anchor

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Inshore fishing fleet

3.1 Four Anchors, in Order



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

The Highway 103 Commercial Development & Investment Roadmap tested three anchors (a Regional Health & Specialist Centre, a Micro-Hotel / Limited-Service Hotel, and a Highway Commercial / Retail Anchor) and identified a fourth through gap research: a Highway Stop / Rest Area with EV Charging. All four are carried forward here, ordered by deliverability and evidence.

Table 3: 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	Phase 2	Highway 103-facing lands	Builds on the traffic the travel stop generates; small-format and value-oriented, without duplicating downtown.
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 / Limited-Service 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.



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

The scores weigh community alignment, site suitability, market need, economic impact, and strategic fit. They inform the order but do not set it alone: the health centre scores well on need but sits third because its timing is outside the Municipality's control.

How the order was set. Each anchor was rated 1 to 10 on five weighted questions: fit with long-term goals (25%), what residents and businesses want (20%), proven market need (20%), jobs and economic benefit (20%), and site suitability (15%). Tier 1 goes 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 rank combines the score with how soon each anchor can be delivered.

3.2 What the First Phase Looks Like

Tier 1 · Phase 1

Highway Stop / Rest Area with EV Charging

A branded fuel and convenience stop, a DC fast-charging hub (8 to 12 stalls suggested), one or two quick-service restaurants, and truck and RV parking with washrooms and visitor information, on a first pod of about 20 to 25 acres.



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



Example of the format: DC fast chargers beside parking stalls.



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

Candidate partners include Irving Oil/Circle K, Wilsons Gas Stops, Petro-Canada dealers, and Parkland for fuel; Nova Scotia Power, Tesla, and FLO for charging; and A&W, Mary Brown's, Dairy Queen, McDonald's, and the existing Tim Hortons franchisee for food. These are candidates for early conversations, not confirmed interest. A full truck stop is not recommended until mainline traffic and truck share are known.

3.3 The Four Anchors at a Glance



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

Table 4: Development case summary

	Highway Stop / Rest Area + EV	Highway Commercial / Retail	Regional Health & Specialist Centre	Micro-Hotel
Indicative size	8,000–12,000 sq ft building; 8–12 pumps with truck lane; EV charging; 30–50 truck/RV spaces	First phase 8–12 acres, growing parcel by parcel	About 2–4 acres	25–50 rooms tested; lower end more realistic
Location	Highway-facing lands	Highway-facing lands	Woodlawn Drive	Beside the travel stop

	Highway Stop / Rest Area + EV	Highway Commercial / Retail	Regional Health & Specialist Centre	Micro-Hotel
Target partners	Irving/Circle K, Ultramar, Petro-Canada, Co-op; Tim Hortons, A&W; NS Power, Tesla, FLO; First Nation landowner-partner	Dollarama, Giant Tiger, Sobeys or Co-op, Home Hardware or Kent, a bank or credit union	NS Health Western Zone; pharmacy, physio, dental, optometry tenants; build-to-suit developers	Hampton, Holiday Inn Express, Comfort Inn, Best Western franchisees; local owners
Key constraint	Direct access preferred (local-road access possible); servicing	Small trade area; downtown overlap	Provincial control of services and timing; recruitment	Unproven demand; seasonality
Next step	Traffic counts and highway-services inventory; concept plan with funding scenarios	Leakage by category; named tenant list	Engage Western Zone and Community Partners; tenant letters of interest	Hotel feasibility study

The Municipality does not need to sell the whole property. Each anchor can use the structure that suits it: a conditional land sale, a ground lease, build-to-suit, individual serviced parcels, or a partnership such as the First Nation landowner-partner model used at Glooscap Landing.

3.4 One Mixed-Use Node, Built in Three Parts



Historic waterfront buildings, Shelburne Harbour

We recommend planning the whole property for mixed use, so each part can combine commercial, service, office, health, and community uses as demand grows, approved through development agreements under the Special Planning Area. Highway-dependent uses sit on the Highway 103-facing lands near Exits 25 and 26; destination uses such as health care sit on the Woodlawn Drive lands.

Table 5: Three mixed-use nodes, each one starting the next

Node	Uses	Passes on to the next node
Highway gateway (Years 1–3)	Fuel, food, EV charging, truck and RV parking, local products	Access road, services, signs, steady customers
Mixed-use cluster (Years 3–5)	Value stores, café, bank, professional offices, experiential tourism, hotel pad if proven	Extended services, a business address, more visitors
Health and community campus (Years 5–10)	Health centre, pharmacy, later seniors' living and housing	Weekday visits back to the shops and the stop

The cluster should include experiential tourism: a tasting room for local producers such as Boxing Rock and District 33, a local food and artisan market, and a tour and outfitter hub that sends visitors on to Sandy Point, the historic waterfront, and the Black Loyalist Heritage Centre. These give travellers reasons to stay longer and link the site to Hartz Point and downtown.

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

3.5 Implementation Plan by Anchor

Each anchor is managed as its own project, built on the shared Year 1 foundation work (the development agreement framework, technical studies, and the highway access discussion), and each is approved by Council through a development agreement. The full report sets out step-by-step plans for each.

Table 6: Implementation plan by anchor

Anchor	Lead	Timing	First steps	Go / no-go test	Measures of success
Highway Stop / Rest Area with EV Charging	Economic Development, CAO, Public Works	Years 1–3	Traffic counts and highway-services inventory; development agreement framework; servicing and power studies; concept plan with three funding scenarios; local-first operator talks.	Access approach settled (direct, or local-road access operators accept); traffic supports the format; fuel operator and charging partner committed.	Opening date; jobs; new assessment; charger and fuel transactions; off-season revenue.
Highway Commercial / Retail Cluster	Economic Development, Planning	Years 3–5	Reserve pads; measure leakage by category; build a named target-tenant list.	Travel stop open with supportive traffic; two or more tenant letters of intent; no duplication of downtown.	Space leased; new businesses and jobs; fewer residents leaving to shop.
Regional Health & Specialist Centre	CAO, Economic Development	Partnership from Year 2; build Years 5–10	Reserve 2–4 acres on Woodlawn Drive; engage NS Health Western Zone and Community Partners; collect tenant letters of interest.	NS Health commits services, or private tenants commit enough space to anchor the building.	Local specialist days and services; residents served locally; professionals recruited.

Anchor	Lead	Timing	First steps	Go / no-go test	Measures of success
Micro-Hotel (conditional)	Economic Development	Years 3–5	Reserve a 2–3 acre pad; include hotel use in the development agreement framework; commission a feasibility study.	Year-round occupancy at or above the 65% benchmark; operator committed; travel stop open.	Occupancy and room nights; visitor spending; jobs.

Table 7: 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							
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				■		

Activity	Lead	Y1	Y2	Y3	Y4	Y5	Y6–10
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

04 Highway Access: A Risk to Manage

4.1 Why It Matters
4.2 What the Municipality Should Do

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Beaches of the Shelburne coast

4.1 Why It Matters

A highway rest stop works best when drivers can reach it directly; if they must leave the highway and follow a local road, some will continue to the next stop. The 103 Property has no direct access today, and nothing near Shelburne appears in the Province's 2026-27 Five-Year Highway Improvement Plan other than repaving near Exit 30. Exits 24 to 27 are reported to be at-grade junctions, and Council raised safety concerns about Exit 26 with the Minister in October 2023. **This is a risk, not a barrier:** the property can still be developed with access from Pells Road or Woodlawn Drive, with the highway stop sized to the traffic it can capture that way.



Concept rendering: covered charging bays for heavy trucks

4.2 What the Municipality Should Do

Pursue direct access as a two- to three-year campaign while designing the site to work from the local roads from the start:

1. **Build the case** (Year 1). Obtain mainline traffic and truck share at Exits 24 to 27, assemble collision history and Council's 2023 letter, and document the corridor service gap.
2. **Engage technically** (Year 1–2). Agree the scope of a traffic impact study with Public Works before commissioning it, and request written feedback on access options, permits, and cost-sharing.
3. **Engage politically** (Year 1–2). Council resolution, a ministerial meeting with the local MLA's support, and letters from the Town, Chamber, tourism partners, and prospective operators.
4. **Seek a provincial decision** (Year 2–3) and capital-plan inclusion, negotiating conditions and cost-sharing.
5. **Design and deliver** (Year 2–3) the access works with the operator's build, if approved.

Advance signage several kilometres before the stop should be requested in parallel, and the site layout should reserve land for future ramps and right-of-way before any parcel is subdivided or sold. If direct access is deferred or declined, the Municipality should proceed with access from Pells Road or Woodlawn Drive and strong signage, keep the direct-access request active, and confirm that operators accept the local-road format before committing.

05 Recommendations

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Historic waterfront buildings, Shelburne Harbour



Shelburne's harbour front in autumn

Table 8: 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

Next steps and recommended studies. First, Council adopts the assessment, 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 are to be set by staff and Council.

Table 9: Next steps and recommended studies

When	Study or task	Purpose
First 90 days	Highway access business case	Evidence for Public Works; Council resolution and ministerial briefing
First 90 days	Economic and fiscal impact model	Jobs, spending, and tax revenue by phase
First 90 days	Hartz Point and 103 Property alignment	A joint strategy for the two municipal sites
Year 1	Engineering site studies	Soil, servicing, power, flood, wetland, and wildfire
Year 1	Concept site plan with funding scenarios	Layout, phasing, and three funding scenarios
Year 1	Development agreement framework and investor package	Clear rules, site profile, Invest Nova Scotia listing
Year 1	Operator market sounding and call for interest	Test interest from fuel, food, and charging operators
Year 1	EV funding application; incentive and land policy	ZEVIP; phased taxation, cost-sharing, buy-back clause
Years 2 to 5	Retail tenant study, hotel feasibility, health centre business case	Tenant list; hotel test; case for Nova Scotia Health
Ongoing	Progress monitoring	Quarterly Year 1 updates and annual reports

Potential investors by node. Node 1: fuel operators (Irving/Circle K, Ultramar, Petro-Canada dealers, Co-op, Wilsons, Parkland), food brands (the local Tim Hortons franchisee, A&W, Mary Brown's, Dairy Queen, McDonald's), EV charging (Nova Scotia Power, Tesla, FLO), and a Mi'kmaw First Nation development corporation as a possible partner. Node 2: Dollarama, Giant Tiger, a small-format grocer, Home Hardware or Kent, a bank or credit union, professional offices, local producers and tour operators, and regional developers; hotel franchisees if demand is proven. Node 3: Nova Scotia Health, pharmacy and allied health

practices, healthcare build-to-suit developers, and later seniors' living operators. None has been approached yet.

Investor attraction: next steps. Get investment-ready (studies, development agreement framework, site plan); prepare a short investor package for each node; build a local-first target list, starting with Node 1; reach operators directly and through Invest Nova Scotia, ACOA, and Tourism Nova Scotia; run a call for interest for each node; have incentives and land terms ready; respond quickly through one contact; and report the investor pipeline to Council quarterly.

06 Roadmap and Risks

6.1 A Ten-Year Pathway
6.2 Decision Gates
6.3 Principal Risks

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A community festival on the harbour

6.1 A Ten-Year Pathway

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.

Table 10: Indicative schedule — Phased implementation plan

Activity	Lead	Y1	Y2	Y3	Y4	Y5	Y6–10
Foundation: confirm, study, and prepare							

Activity	Lead	Y1	Y2	Y3	Y4	Y5	Y6–10
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						
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						

Planned activity Conditional on a gate or partner commitment Decision point

Timing is indicative. Phase 1 depends on the Province's response to the access request.



Coastal beach at sunset



Market day on the historic waterfront

6.2 Decision Gates

Key gates before the Municipality commits land or capital

End of Year 1	Studies complete, development agreement framework ready, dossier assembled; Council decides whether to begin operator outreach.
Year 2	Access approach settled: direct access approved, or a local-road access design and signage that operators accept.
Year 3	Travel stop open; traffic and sales baseline confirms whether Phase 2 proceeds.
Year 4	Hotel proceeds only with proven demand and an operator commitment.
Year 5	Health centre proceeds only with a committed partner and evidence of service demand.



Coastline and beaches are among the area's strongest attraction assets.

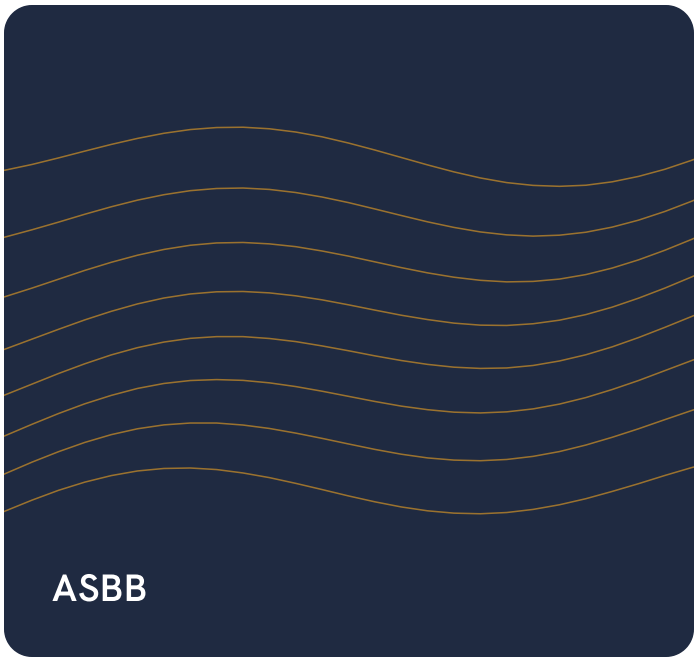
6.3 Principal Risks

Table 11: Principal risks and mitigations

Risk	Mitigation
The Province defers or declines direct access	Develop from Pells Road or Woodlawn Drive with strong advance signage and a format sized to that access; keep pursuing direct access; preserve land for future ramps.
Traffic volumes are lower than needed	Obtain mainline traffic and truck share before marketing; size Phase 1 to the data.
Servicing and power costs are too high	Test on-site servicing against municipal extension; confirm electrical capacity; use cost-sharing and EV funding.
Development agreement approval	Publish a development agreement framework early; consult on the concept before formal applications; build the public hearing into each timeline.
Seasonal demand and a small market deter operators	Favour operators that also serve local daily demand; keep the hotel conditional.
The node draws trade from existing businesses	Avoid duplicating downtown; steer apparel, gifts, and dining to Water Street; engage the existing Tim Hortons franchisee.

Risk	Mitigation
Community expectations around healthcare and housing	Explain how and why anchors are sequenced; describe the health centre as longer-term and conditional.
Loss of leverage after land is sold	Adopt a disposition policy with milestones and a reacquisition clause.
Limited staff capacity	Phase work through the budget; assign clear leads; consider dedicated project support in Year 1.

07 The First 90 Days





Coastal beach at sunset



Lobster traps and an inshore fishing boat



Coastal landscape of the Municipality

The first actions require no operator, developer, or provincial decision, so they can begin immediately and carry the least risk.

1. Council adopts the anchor hierarchy, three-phase approach, and spatial direction as the Municipality's position (Recommendation 01).

2. Council confirms the anchor uses it is prepared to consider under the Special Planning Area, and Planning begins a development agreement framework for the 103 Property (Recommendation 04).

3. The CAO requests a pre-consultation meeting with Nova Scotia Public Works on direct access, and Public Works requests mainline traffic and truck-share data for Exits 24 to 27 (Recommendation 02).

4. Economic Development is designated as the single point of contact for all 103 Property inquiries (Recommendation 04).

5. The geotechnical, servicing capacity, and flood/wetland/coastal hazard studies are scoped and procured (Recommendation 03).

6. The Municipality confirms the Town's plans for development around Exit 26 and agrees how to coordinate (Recommendation 01).

7. Initial, informal conversations begin with Nova Scotia Power about the corridor charging gap and the site's electrical capacity (Recommendation 05).

08 Benefits and the Province

8.1 Jobs, Economic Growth, and Tax Revenue
8.2 Working with the Province

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Shelburne Harbour from the air

8.1 Jobs, Economic Growth, and Tax Revenue

The 103 Property brings in no tax revenue today. Each node creates jobs, keeps spending in Shelburne, and adds commercial assessment.

Table 12: Benefits by node

Node	Jobs	Economic growth	Tax revenue
Highway stop and EV charging	Fuel, convenience, food service, maintenance	Captures spending from Highway 103 travellers (180,000+ overnight stops a year in the region)	First commercial assessment on the site
Mixed-use cluster	Retail, café, banking, professional offices	Keeps local spending here; 85.3% of residents now leave for services	Each new shop pad adds assessment

Node	Jobs	Economic growth	Tax revenue
Micro-hotel (if proven)	Hospitality	Overnight visitor spending	A further commercial building
Health and community campus	Year-round skilled health and care jobs	Helps keep families and attract professionals	Private tenants add assessment

At the commercial rate of $1.82 per $100, every $1 million of new commercial assessment adds about $18,200 a year in municipal revenue; $10 million adds about $182,000. These figures are illustrations, not forecasts. Phased taxation can lower early bills while the Municipality still collects at least half of the added revenue.

The Ontario example. Ontario's 20 rebuilt ONroute highway service centres on Highways 401 and 400 (about $300 million, Design Build Finance Maintain, completed 2013, LEED Silver) employ about 100 to 150 people each, about 2,500 in total. Fast charging was added later through Ivy, a utility partner, with 69 chargers planned across 23 stops and a federal contribution covering about 30% of the cost. The 103 Property would follow the same model at a much smaller scale, on municipal land that adds to Shelburne's tax base.

8.2 Working with the Province

The Province decides highway access and signage and controls publicly funded health services, so partnership is essential. The plan supports provincial priorities: clean electricity (EV charging), health recruitment and care (the health campus), tourism and the Lighthouse Route (traveller services), and investment attraction (an Invest Nova Scotia listing).

Table 13: Provincial partners and what to negotiate

Partner	The Municipality asks for	The Municipality brings
Nova Scotia Public Works	Direct access near Exits 25 and 26, advance signage, traffic data	Traffic and safety evidence, the 2023 Exit 26 letter, the economic case, reserved ramp land, a local-road design
Nova Scotia Health (Western Zone)	Services at a health and specialist centre	2 to 4 acres at Woodlawn Drive, servicing, private tenants
Invest Nova Scotia	Site listing and investor introductions	An investment-ready package and one contact

Partner	The Municipality asks for	The Municipality brings
Nova Scotia Power and federal EV programs	Grid capacity, a charging partner, ZEVIP funding	A charging site on the corridor's longest gap

Lead with evidence, meet technical staff before making a formal request, seek Council and MLA support for a ministerial meeting, and keep the local-road fallback ready.

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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