



B&A | REGIONAL DISTRICT  
OF CENTRAL OKANAGAN

# Regional Employment Lands Inventory

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**Final Report & Findings**

February 20, 2025

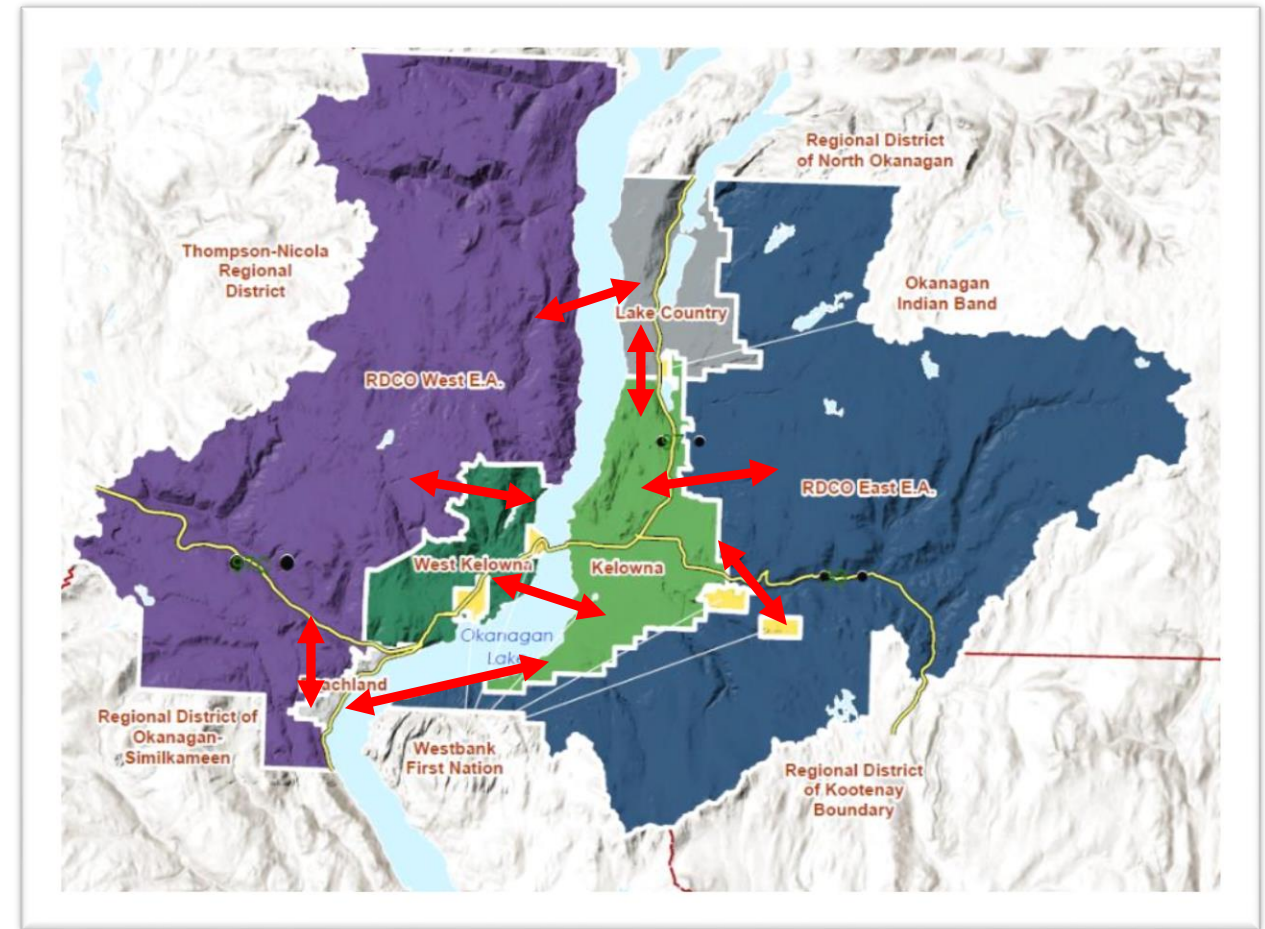
**Deloitte.**

**B&A**



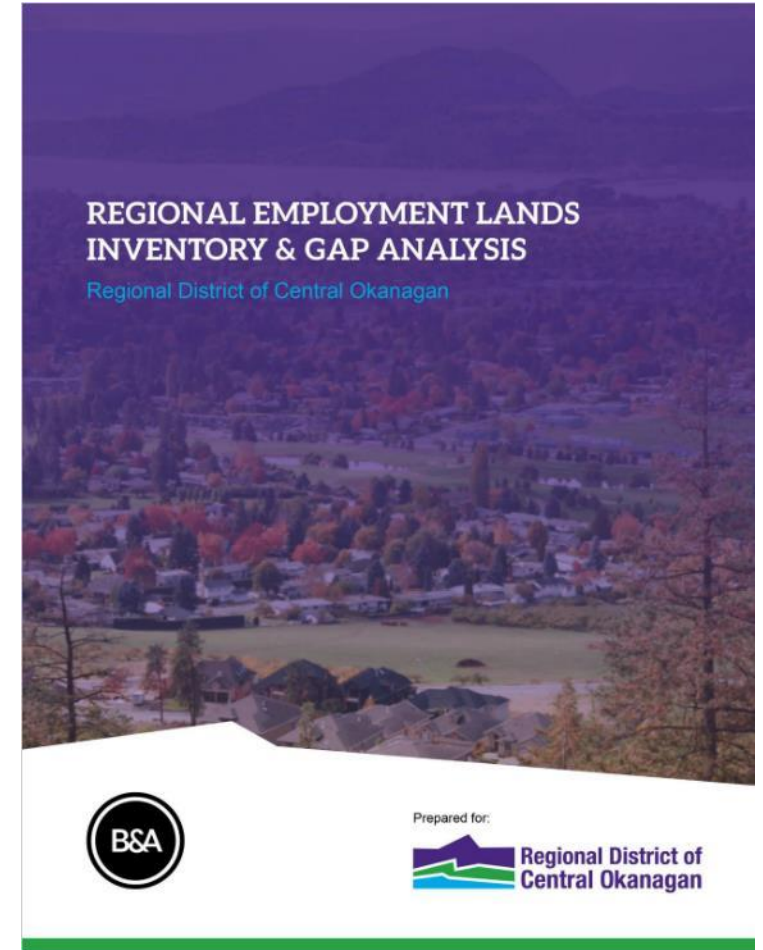
# Background

- As part of implementing the Regional Growth Strategy, RDCO is advancing regional planning initiatives on topics that cross jurisdictional boundaries
- The Regional Employment Lands Inventory (RELI) helps all partner jurisdictions plan for growth and support a strong regional economy



# Regional Employment Lands Inventory (RELI)

- An adequate supply of employment lands is vital for supporting economic development in our rapidly growing region
- The RELI provides information on future deficits/surplus of employment lands region-wide
- The RELI interactive mapping tool helps the business community, real estate professionals, and public easily locate employment lands with desired features

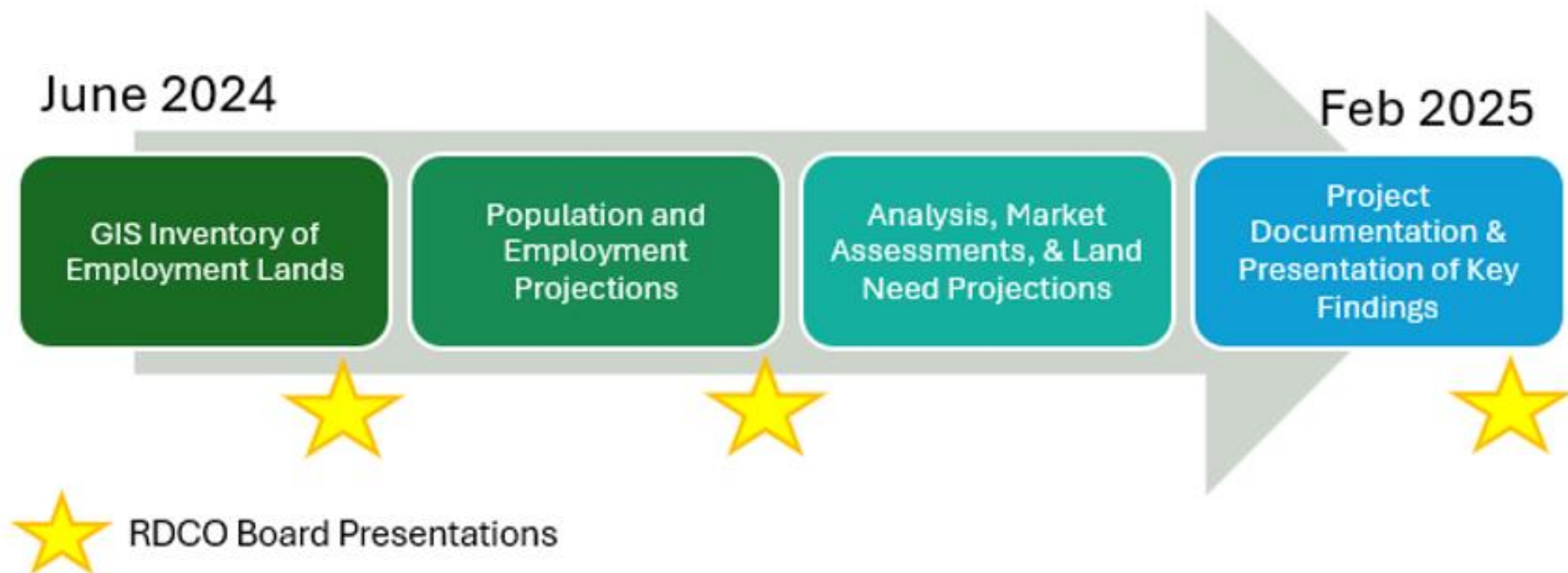


# Regional Employment Lands Inventory (RELI)

- Final project of the 2017 RGS Priority Projects Plan
- Developed in collaboration with the Central Okanagan Economic Development Commission and the RELI Technical Committee
- Funded by provincial grants



# Project Timeline







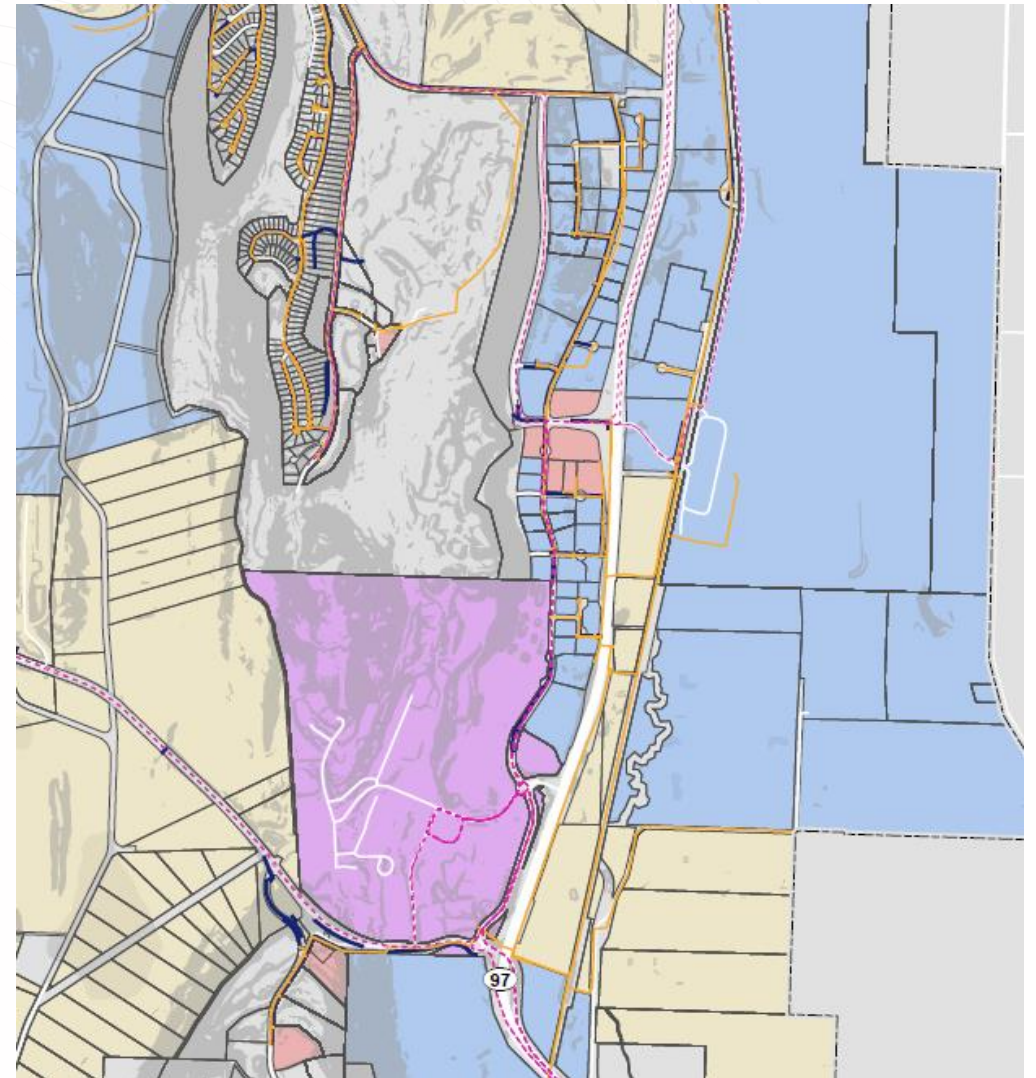
# The Regional Employment Land Inventory at a Glance





# The Regional Employment Lands Inventory (RELI) Tool

- Provides a **detailed, up-to-date, and easy to use tool that tracks different employment land uses** for planning and economic development functions
- At its core, the RELI seeks to understand three key elements:
  - **EMPLOYMENT CHANGE:** How much employment growth is reasonable to expect across the region by 2046?
  - **LAND USE DEMAND:** How do those jobs relate to different types of land and how much land is needed to accommodate that demand?
  - **POTENTIAL SUPPLY:** How much land do we have available to accommodate that demand? Where are there shortfalls or constraints?



# Defining Employment Lands

Lands are classified into **six** categories:

**Commercial:** Retail, service and office uses, including most mixed-use

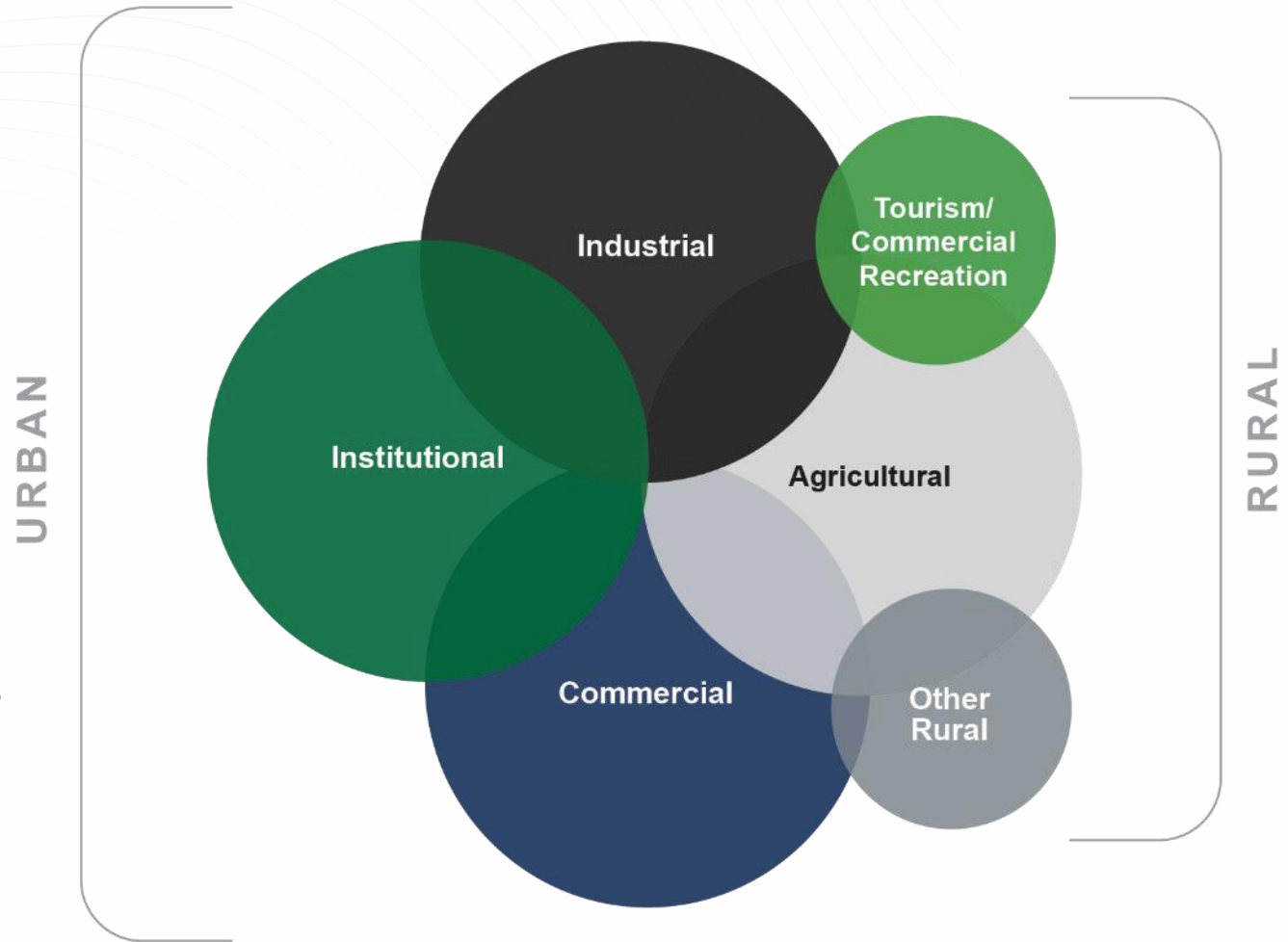
**Institutional:** Civic, health care, educational uses

**Industrial:** Light and heavy manufacturing, business parks, warehousing and transportation

**Agricultural:** Farming and other agricultural uses (includes both ALR/non-ALR), including wineries

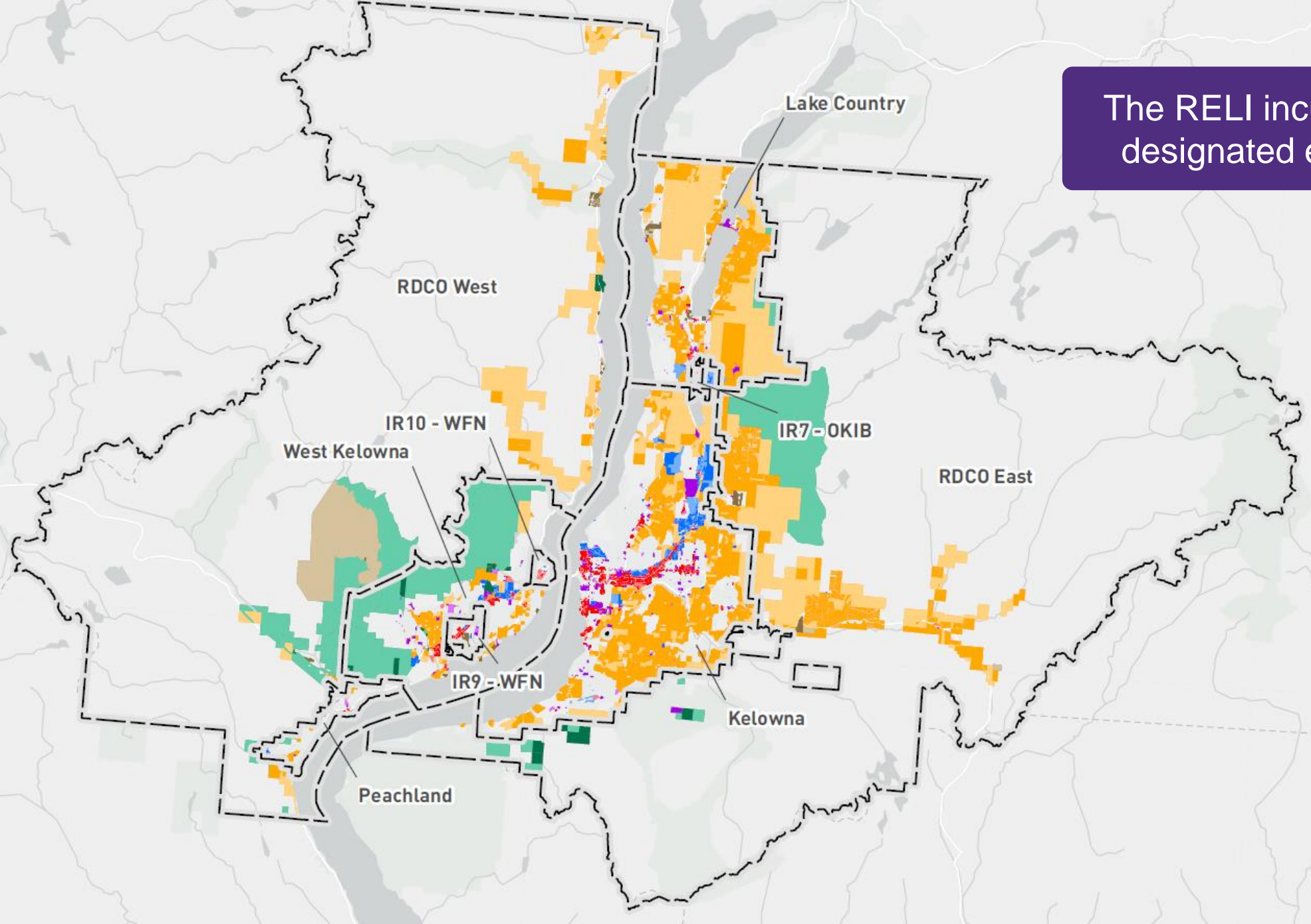
**Tourism/Commercial Recreation (TCR):** Tourist-oriented uses, resorts, private golf courses

**Other Rural:** Extractive, hunting, forestry, and other non-urban uses





The RELI includes 56,741 ha of designated employment land



- ELAC (Occupied)
  - Agricultural
  - Commercial
  - Industrial
  - Institutional
  - Rural
  - Tourist/Commercial Recreation
- ELAC (Vacant)
  - Agricultural
  - Commercial
  - Industrial
  - Institutional
  - Rural
  - Tourist/Commercial Recreation
- Municipal Boundary



# The Regional Context at a Glance

URBAN: 3,552 ha (6%)

**COMMERCIAL**  
1,036 ha

- Parcels: 2,558
- Occupied: 877 ha
- Vacant: 159 ha

**1.8%**

**INSTITUTIONAL**  
720 ha

- Parcels: 583
- Occupied: 654 ha
- Vacant: 66 ha

**1.6%**

**INDUSTRIAL**  
1,559 ha

- Parcels: 945
- Occupied: 1,199 ha
- Vacant: 597 ha

**3.2%**

RURAL: 53,189 ha (94%).

**AGRICULTURAL**  
33,630

- Parcels: 3,992
- Occupied: 16,311 ha
- Vacant: 17,320 ha

**59.3%**

**TOURISM /  
COMMERCIAL  
RECREATION**  
3,339 ha

- Parcels: 617
- Occupied: 311 ha
- Vacant: 3,028 ha

**5.9%**

**OTHER RURAL**  
16,220 ha

- Parcels: 103
- Occupied: 778 ha
- Vacant: 15,442 ha

**28.6%**

*Figures may not sum to total due to rounding*



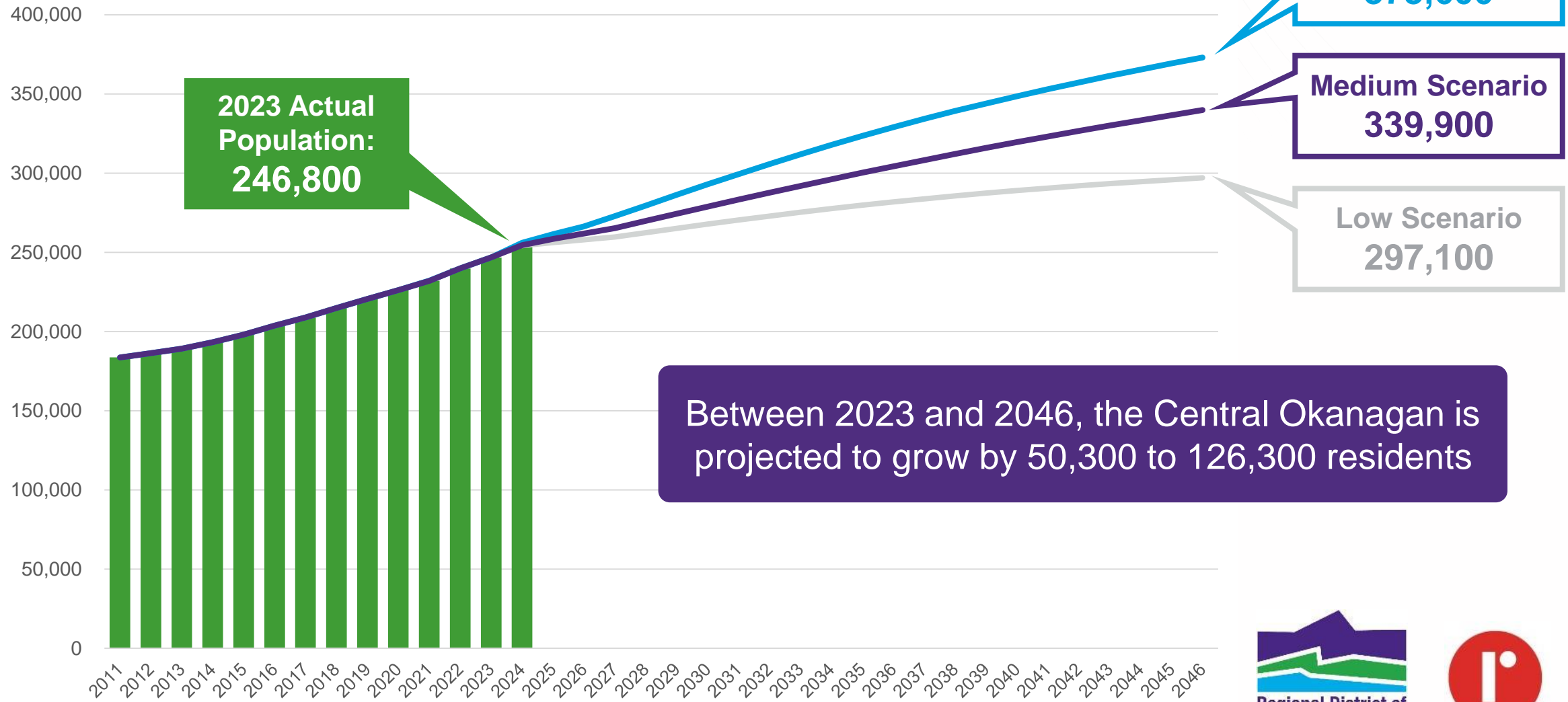


# The Outlook for Growth



**Deloitte.**

# REGIONAL POPULATION PROJECTIONS



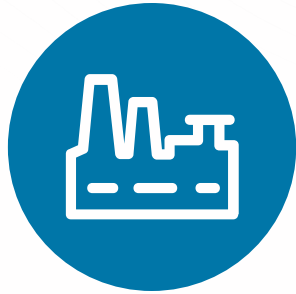
Population Projections prepared by Rennie Group





# Regional Economic Modeling

Employment projections are based on the **role that each industry plays** in the regional economy:



## Traded Sectors

Sell primarily **outside the region.**

Growth driven by global/national trends and regional competitiveness.



## Business Support Sectors

Sell primarily to **other local businesses.**

Growth follows overall regional employment.



## Population Serving Sectors

Sell primarily to **local households.**

Growth is determined by population change.

Employment growth is consistent with future labour force growth.

# Regional Employment Projections by Sector

SECTOR	ESTIMATED 2023 JOBS	PROJECTED 2046 JOBS	EMPLOYMENT CHANGE	AVERAGE GROWTH RATE
Health	18,210	34,365	<b>16,155</b>	2.8%
Retail/Wholesale	18,605	28,445	<b>9,845</b>	1.9%
Professional, technical, business services	16,090	25,795	<b>9,705</b>	2.1%
Construction	13,410	20,920	<b>7,510</b>	2.0%
Accommodation & Food	9,680	14,280	<b>4,600</b>	1.7%
Finance, Insurance, Real Estate	6,925	10,800	<b>3,875</b>	2.0%
Education	8,535	11,520	<b>2,985</b>	1.3%
Manufacturing	5,635	8,265	<b>2,630</b>	1.7%
Other Services	5,025	7,590	<b>2,565</b>	1.8%
Utilities, Transportation, Warehousing	4,980	7,475	<b>2,495</b>	1.8%
Public Administration	4,680	7,070	<b>2,390</b>	1.8%
Information, culture, recreation	4,975	7,005	<b>2,030</b>	1.5%
Forestry/Mining	1,300	1,425	<b>125</b>	0.4%
Agriculture	2,025	2,040	<b>15</b>	0.0%
<b>TOTAL REGIONAL EMPLOYMENT</b>	<b>120,100</b>	<b>187,000</b>	<b>66,900</b>	<b>1.9%</b>

\* Based on High (BC Stats) Growth Scenario



# Employment Growth Highlights

- Under the high growth scenario, the region will add **more than 3,000 jobs per year for the next 15 years.** (Average is 2,400 per year in medium scenario, 2,100 per year in low scenario).
- **Health** and **retail/wholesale** are the largest source of new jobs, driven mainly by a growing population.
- The region is emerging as a major centre of **professional, technical and business services.**
- **Manufacturing** is a growth sector but spread across a variety of high-value specialties rather than large, dominant employers.
- Agriculture employment is constant, but **economic value of food production grows** through food & beverage manufacturing growth.
- **Commercial land** projected to have largest employment increase, followed by industry and institutional.

LAND USE TYPE	EMPLOYMENT CHANGE (2023-2046)	AVERAGE GROWTH RATE
Commercial	<b>26,575</b>	1.9%
Industrial	<b>17,165</b>	1.8%
Institutional	<b>13,000</b>	2.3%
Home-based	<b>8,825</b>	1.9%
Agricultural	<b>770</b>	0.9%
TCR	<b>455</b>	1.6%
Other Rural	<b>140</b>	1.1%
<b>TOTAL</b>	<b>66,900</b>	<b>1.9%</b>



# Employment Land Demand & Gap Analysis



# Employment Land Demand Projections

## Projected Land Demand by ELAC, Central Okanagan

Analysis Class	Low Scenario		Medium Scenario		High Scenario	
	Job Change (2023-46)	Land Demand (ha)	Job Change (2023-46)	Land Demand (ha)	Job Change (2023-46)	Land Demand (ha)
<b>Urban Employment Land</b>						
Commercial	17,110	195	21,350	242	26,575	300
Industrial	11,135	245	13,700	301	17,165	378
Institutional	8,460	191	9,945	222	13,000	281
<b>Rural Employment Land</b>						
Agricultural	770	2,741	770	2,741	770	2,741
TCR	335	35	320	33	400	42
Other Rural	95	72	105	79	140	106
<b>Total</b>	<b>37,900</b>	<b>3,478</b>	<b>46,190</b>	<b>3,619</b>	<b>58,050</b>	<b>3,848</b>

*Projected job change 2023-2046 figures exclude jobs Working from Home  
 Figures have been rounded and may not sum to total*





# Gap Analysis

**Total Vacant  
Land Supply**

—

**Projected Land  
Demand  
(2023-46)**

=

**Surplus /  
(Deficit)**

- Not all vacant sites will turn over
- Many of these lands feature constraints that may limit potential
- Some occupied sites may redevelop / intensify over time

- The nature of employment is changing and shaped by market
- Amount of land required may change based on constraints

# Regional Gap Analysis (2023 – 2046)

COMMERCIAL				
TOTAL VACANT SUPPLY	LOWEST SCENARIO		HIGHEST SCENARIO	
	DEMAND	SURPLUS / (DEFICIT)	DEMAND	SURPLUS / (DEFICIT)
159 ha	195 ha	(56 ha)	300 ha	(141 ha)

*Figures are rounded and may not sum to total*

- Demand averages between **8 ha to 13 ha per year**. Vacant land between **12 to 19 years of supply**.
- As much as 3/4 of demand generated in Kelowna, exceeding supply. Much of this growth will need to be accommodated via intensified redevelopment of underutilized lands (145 ha)
- Outside of Kelowna, most jurisdictions projected to have a modest surplus. May potentially absorb some regional spillover from Kelowna.



# Regional Gap Analysis (2023 – 2046)

INDUSTRIAL				
TOTAL VACANT SUPPLY	LOWEST SCENARIO		HIGHEST SCENARIO	
	DEMAND	SURPLUS / (DEFICIT)	DEMAND	SURPLUS / (DEFICIT)
597 ha	245 ha	352 ha	300 ha	(141 ha)

*Figures are rounded and may not sum to total*

- Demand averages between **11 ha to 16 ha per year**. Vacant land equates to between **36 and 56 years of supply *not accounting for constraints***.
- With 522 ha of vacant land, Kelowna is projected to accommodate the largest share of Industrial growth. Under 2/3 of this land (344 ha) is currently serviced, and only ~60 ha are not otherwise constrained.
- Throughout the rest of the region, only Lake Country appears to have sufficient supply to meet projected local Industrial demand.





# Regional Gap Analysis (2023 – 2046)

INSTITUTIONAL				
TOTAL VACANT SUPPLY	LOWEST SCENARIO		HIGHEST SCENARIO	
	DEMAND	SURPLUS / (DEFICIT)	DEMAND	SURPLUS / (DEFICIT)
66 ha	191 ha	(125 ha)	281 ha	(216 ha)

*Figures are rounded and may not sum to total*

- Demand averages between **8 ha to 12 ha per year**. Supply could be **depleted in less than a decade**.
- Kelowna is projected to see bulk of demand, putting considerable pressure on limited supply.
- Growth in other jurisdictions will also create local need for additional Institutional space, notably in Westbank First Nation (IR#9 & IR#10), Lake Country, and West Kelowna.



# Regional Gap Analysis (2023 – 2046)

AGRICULTURAL				
TOTAL VACANT SUPPLY	LOWEST SCENARIO		HIGHEST SCENARIO	
	DEMAND	SURPLUS / (DEFICIT)	DEMAND	SURPLUS / (DEFICIT)
17,920 ha	2,741 ha	14,579 ha	2,741 ha	14,579
TOURISM / COMMERCIAL RECREATION				
TOTAL VACANT SUPPLY	LOWEST SCENARIO		HIGHEST SCENARIO	
	DEMAND	SURPLUS / (DEFICIT)	DEMAND	SURPLUS / (DEFICIT)
3,028 ha	35 ha	2,993 ha	42 ha	2,986 ha
OTHER RURAL				
TOTAL VACANT SUPPLY	LOWEST SCENARIO		HIGHEST SCENARIO	
	DEMAND	SURPLUS / (DEFICIT)	DEMAND	SURPLUS / (DEFICIT)
15,442 ha	72 ha	15,370 ha	106 ha	15,336 ha

Figures are rounded and may not sum to total



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# Findings and Implications





# Findings from the Gap Analysis

- There are several areas where the projected rate of job growth **will be greater than the current land supply's capacity to accommodate**.
- This is **most prevalent amongst urban employment land uses**, namely Commercial and Institutional, but also unconstrained Industrial lands.
- Most **demand is focused within the City of Kelowna**, but population growth across all parts of the region **will drive the demand for local services** and businesses.
- Gap analysis **assumes no net loss of existing employment lands** - RDCO and partners must continue to protect existing employment lands.




# Recommendations

- The **provision of sufficient land** to accommodate employment growth is **necessary to support a strong, robust economy.**
- **Proactive management and planning** for continued growth across each of the different types of employment land are crucial for the **long-term success of the Central Okanagan.**
- **Strategic review and planning** for each land use class will better position the region to attract and accommodate future economic opportunity.







# RELI Interactive Mapping Tool





# Regional Employment Lands Inventory

A resource for employment land availability for the Central Okanagan.

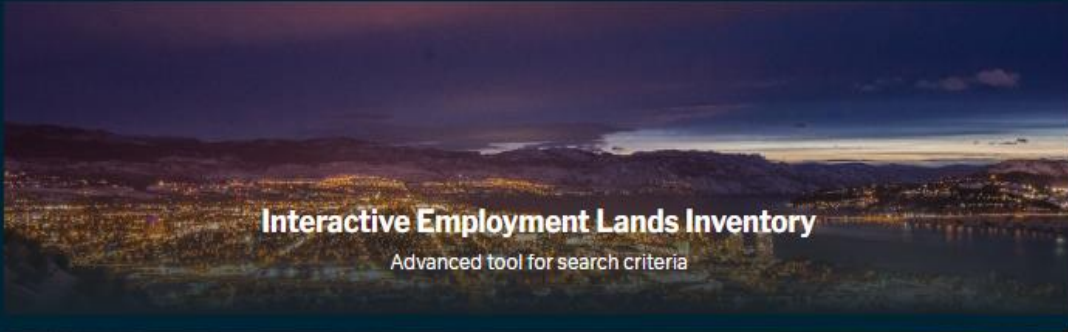
Get started

As one of the fastest growing regions in Canada, the Central Okanagan offers one of the most desirable locations in British Columbia for business development and expansion. The Regional Employment Lands Inventory (RELI) provides employment land availability and information for RDCO electoral areas, partner municipalities and First Nation lands.



## Regional Employment Lands Community Information


Introduction to each community and their focused sites of development



## Interactive Employment Lands Inventory

Advanced tool for search criteria

### District of Lake Country



Lake Country Town Centre

One of the fastest growing communities in British Columbia, the District of Lake Country is located at the northeastern point of the Central Okanagan, only 30 minutes from both Okanagan-Kelowna and Okanagan-Verona. A rural community with agriculture at its heart, many businesses have worked the land for generations.


Known for tranquil lakes, rolling hills, lush orchards and vineyards, Lake Country is the perfect setting to enjoy the unparalleled natural beauty of the area. Great recreation access to urban amenities while also providing the peace and serenity of small town living.

The District of Lake Country is focused on smart industrial and commercial growth that complements its rural and agricultural nature with a growing focus on dedicated to commercial, industrial and residential development.

The top three industry sectors based on employment distribution in Lake Country are construction, health care and social assistance and retail trade. There are more than 3000 businesses based in Lake Country.

- Town Centre
- Woodbine Island/Lake Neighborhood
- Lake Country Business Park

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- Town Centre
- Woodbine Island/Lake Neighborhood
- Lake Country Business Park

Regional Employment Lands Inventory (RELI) - Lake Country

- Industrial
- Commercial
- Community
- Residential
- Other
- Unzoned/Undeveloped

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- Commercial
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Search Criteria

Map Inventory

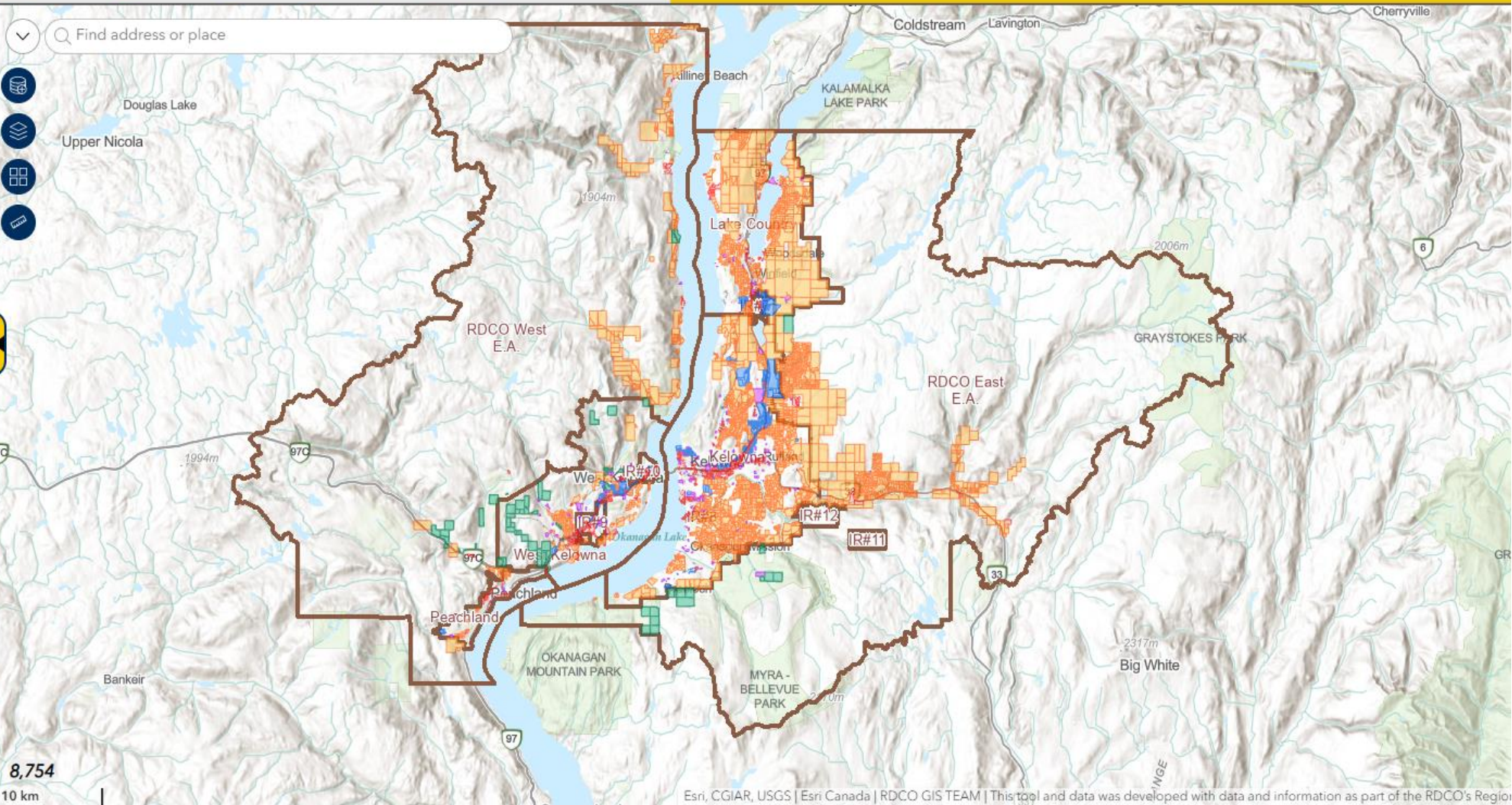
Data Table

Record Details

Field Definition

Central Okanagan Regional Employment Lands Inventory

- Agricultural
- Commercial
- Industrial
- Institutional
- Rural
- Tourist/Commercial Recreation



8,754

10 km

Esri, CGIAR, USGS | Esri Canada | RDCO GIS TEAM | This tool and data was developed with data and information as part of the RDCO's Region

**Employment Lands Category**

Select the employment lands category you are looking for

Agricultural    Commercial

Industrial    Institutional    Rural

Tourist/Commercial Recreation

*You can select multiple*

Base Filters

Services

- Has Water Service within 100m
- Has Sanitary Service within 100m
- Has Road Service within 100m

Constraints

- Slope is Unconstrained
- Environmental is Unconstrained
- Has frequent Transit within 400m





# Next Steps





# Next Steps

Phase 1 - Regional Employment Lands Inventory (Complete!)

Phase 2 - Regional Employment Lands Strategy (Planned to launch in 2026)

- Further study on commercial and institutional projected shortages
- Work collaboratively with regional partners to identify strategies and actions to address projected employment land shortages



# Recommendation

THAT the Regional Board receives the Regional Employment Lands Inventory project update from the Director of Development and Engineering Services, dated February 20, 2025, for information.

AND THAT the Regional Board direct staff to incorporate the Phase 2: Regional Employment Lands Strategy into the 2026 workplan and budget cycle, for future consideration by the Regional Board.