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DEVELOPMENT UPDATE

THE CITY OF MISSISSAUGA PLANNING AND BUILDING DEPARTMENT

□ REPORT ON YEAR END 1993 □

Mississauga Growth Forecasts

An important function of the Policy Planning Division is to prepare forecasts of population, housing and employment growth for the City of Mississauga. These projections are necessary to ensure that City funds are spent appropriately and that the City plans for the needs of Mississauga residents and businesses.

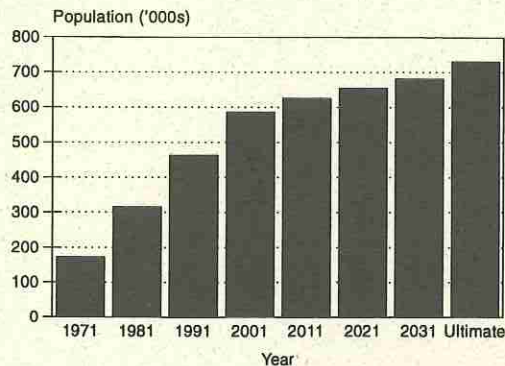
In November, 1993 a document titled *Mississauga Growth Forecasts* was received by City Council. The document presented detailed projection results as well as an explanation of the projection method. Some highlights of this study will be presented here.

The population of Mississauga was about 463,000 persons in 1991, is projected to be approximately 682,000 persons by 2031, and when the City is fully developed will be more than 730,000 persons. Mississauga has experienced tremendous population growth in the last two decades and will continue to grow rapidly in the next decade before the population begins to level. Population growth will slow as the City's supply of land for detached dwellings is exhausted shortly after the turn of the century.

Households sizes are expected to continue to decline. In 1991 the average household size was 3.1 persons, by 2031 this will be 2.6. Declining household size means that housing growth will be stronger than population growth. The decline in household size is the result of many factors, one of which is an aging trend. The average age of a Mississauga resident was 32.6 years in 1991 and will be 43.8 years by 2031. The percentage of children and those in the working age groups will decrease while the percentage of people over the age of 65 years will increase.

Between 1991 and 2031 it is forecast that 110,000 residential units will be built in Mississauga. In 2031, apartments will constitute the largest proportion of the housing stock. This represents a shift from detached dwellings to apartment dwellings. In 1991 almost half the housing stock was detached dwellings; by 2031 only one third will be detached dwellings. *(continued on page 8)*

MISSISSAUGA POPULATION GROWTH



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Mississauga Market Conditions

Housing

The existing housing stock in the City of Mississauga as of December, 1993 consisted of 163,660 units, a slight increase from the same period last year. The mix of dwelling types have remained stable with detached houses and apartments making up the largest portions at 44% and 34% respectively and townhouses and semi-detached each representing 11% of the total housing stock.

Construction activity in 1993 was characterized by a significant decrease in building permits particularly townhouses and apartments, and also a decrease in housing starts. Building permits decreased by 54% compared to 1992. Townhouses, apartments and semi-detached units were down significantly, with detached permits decreasing slightly. Housing starts decreased by 22% from 1992 to 1993; with semi-detached and apartment starts decreasing the most at 38% and 31%, respectively.

Mississauga continues to have a large supply of land ready for building permits; these are unbuilt units on registered plans or zoned lands. There is a capacity of approximately 26,900 units in this category of which 71% are apartments. The number of draft approved units has decreased by 26% from December, 1992 and stands at just under 14,000. Again, apartments represent the largest share with detached units running a close second. Lands under application for development but not yet draft approved remains relatively stable at 31,500 units. Mississauga has lands to accommodate approximately 37,000 units designated for residential development which are not developed or under application for development.

Improved opportunities in the housing market is evident. As in the last period, this may be as a result of the continued decline in the average resale house price which dropped by 5% and the three year mortgage rate remaining low at 8.1%. Rental vacancy rates have fallen, from 3.1% in October, 1992 to 2.2% in October, 1993. Although the vacancy rate has fallen, the short to medium term trend is for the rate to move upward.

The Housing Strategy prepared for Mississauga proposed several targets for residential development. Sixty-four to 74% of the ultimate housing stock by type has been achieved for all but townhouses; only 51% of the target townhouse stock has been built.

Office

Royal LePage predicts that the suburban office markets will recover at a faster rate than similar markets in the core and midtown sectors. New office space will not be coming onto the market for at least a few years partly because the office sector is still troubled by an excess of space. With no new office buildings under construction, Metro West, as well as Mississauga, is assured further reductions with regards to its vacancy rate. This will happen also because of the fact that most companies are seeking quality office space of which Mississauga has a good supply.

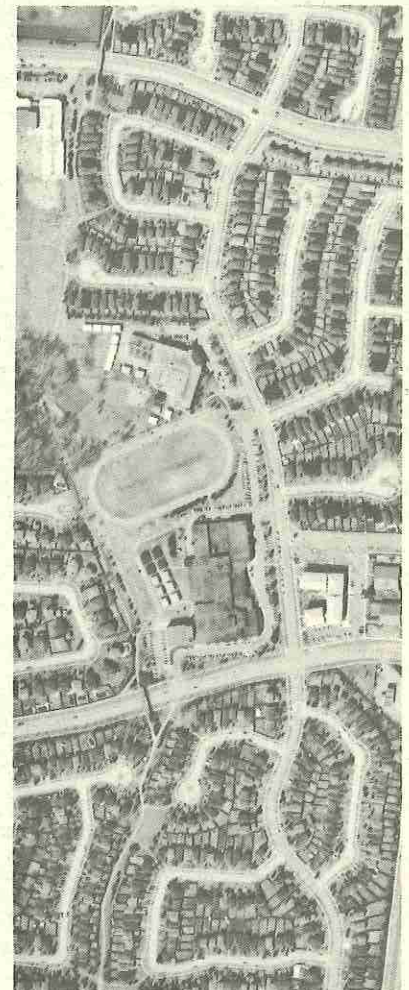
Leasing activity in 1993 indicates that market growth is a result of firms relocating from elsewhere in Metro and from outside the Region. Mississauga was the most active leasing market in GTA as tenant migration from Toronto to Mississauga continues. The first quarter of 1993 leasing activity was higher in Mississauga than in downtown Toronto. The majority of new office leasing activity has focused on the City Centre, the Airport, and Highway 10 Corridor. These office nodes have attracted new tenancies based on highway accessibility and visibility, competitive tax rates, and good supply of space.

Royal LePage reports the Toronto area vacancy rate at 19% as of December 1993, identical to the year end 1992 rate. Metro West (Mississauga, Brampton, Oakville, and Etobicoke) is operating at a vacancy rate of 22% during the fourth quarter of 1993. The vacancy rate in Mississauga has dropped since the 1992 year end from 28% to a rate of 23% as of June 1993. Further, Mississauga continues to gain a larger percentage of the Toronto CMA's inventory, making up 10% of the market, an increase from the 8% reported at the end of 1992. The Metro West area holds at 17% share of the market.

Housing

Housing Development Activity

Construction Activity 1993 Total	Detached	Semi-detached	Townhouse	Apartment	Total
Building Permits	1,692	203	509	210	2,614
Housing Starts ¹	1,709	256	765	922	3,652
Application Activity as of December 31	Detached	Semi-detached	Townhouse	Apartment	Total
Unbuilt Units on Registered Plans or Zoned Lands	4,469	617	2,696	19,104	26,886
Draft Approved	4,899	980	2,110	5,939	13,928
Under Application for Development	3,058	983	5,203	22,257	31,501
Lands Designated, Not Under Application for Development	8,327	81	8,066	20,459	36,933
Existing Units	72,655	17,530	18,603	54,872	163,660
Total	93,408	20,191	36,678	122,631	272,908



Housing Market Indicators

(For the Month of December)	1992	1993	Increase or Decrease
Residential Resales ²	260	451	Increased by 74%
Average Resale House Price ²	\$196,773	\$187,468	Decreased by 5%
Three-Year Mortgage Rate ¹	8.99%	8.10%	Stay the Same
Average Rental Rate 2 Bedrooms (October) ¹	\$802	\$821	Increased by 3%
Rental Vacancy Rate (October) ¹	3.1%	2.2%	Decreased by 29%

Housing Policy Targets

Housing Targets	Target	% Achieved
Dwelling Units		
Short Term Target	197,000	83%
Ultimate Target	245,000	67%
Ultimate Housing Stock		
Detached	98,000	74%
Semi-detached	24,500	72%
Townhouse	36,750	51%
Apartments	85,750	64%

Tenure Targets	Target	% Achieved
Ultimate Tenure Split		
Ownership	60%	65% ³
Rental	40%	35% ³
Average Annual Target Rental Units	1,700	884 (52%)
Non-Profit Units	550	884 (161%)
Average Annual Ownership Units	2,700	2,768 (103%)
Low Density	1,350	1,965 (146%)
Medium Density	900	643 (72%)
High Density	450	160 (36%)

Source: City of Mississauga Planning & Building Department

¹ CMHC Local Housing Market Report and Rental Market Report

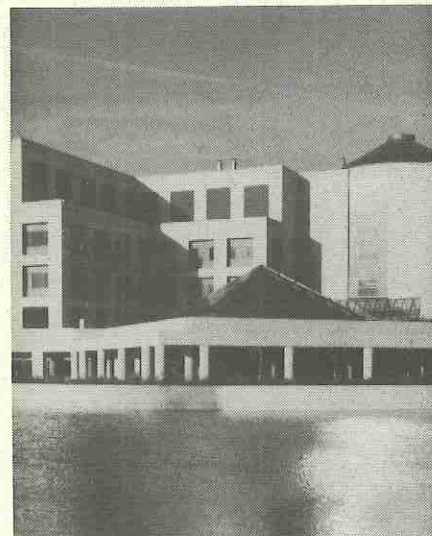
² Canadian Real Estate Association

³ Statistics Canada, Census 1991

DEVELOPMENT UPDATE

Office Commercial

Office Node	Existing m ² (sq.ft)	# Bldgs	On-Stream m ² (sq.ft)	# Bldgs
Airport Corporate	262 543 (2 826 087)	36	101 448 (1 092 011)	9
Airport (Others)	186 213 (2 004 447)	25	55 016 (592 211)	5
City Centre	337 310 (3 630 896)	20	54 660 (588 379)	3
Cooksville	65 845 (708 775)	11	46 103 (496 263)	4
Hurontario (North of 403)	150 369 (1 618 608)	22	130 908 (1 409 126)	5
Meadowvale	133 395 (1 435 904)	21	61 420 (661 137)	9
Sheridan	32 925 (354 412)	4	0	0
Other	137 396 (1 478 972)	31	42 489 (457 364)	6
Total	1 305 997 (14 058 101)	170	492 044 (5 296 491)	41



Source: City of Mississauga Planning and Building Department

Note: A building moves from the on-stream inventory to the existing inventory once the building permit has been issued.

Retail Commercial

As of December, 1993	Regional		District		Neighbourhood		Convenience		Other ¹		Total
	GFA* m ² (sq.ft.)	#	GFA m ² (sq.ft.)	#	GFA m ² (sq.ft.)	#	GFA m ² (sq.ft.)	#	GFA m ² (sq.ft.)	#	GFA m ² (sq.ft.)
Existing	197 227 (2 123 003)	2	269 734 (2 903 488)	10	197 128 (2 121 938)	32	128 415 (1 382 293)	89	157 525 (1 695 640)	26	950 029 (10 226 361)
Unbuilt Units on Registered Plans or Zoned Lands:											
Approved Site Plans					10 658 (114 726)	3	12 350 (132 939)	6	5 769 (62 099)	3	28 777 (309 763)
Site Plans Submitted					15 454 (166 351)	3	13 616 (146 566)	6	18 918 (203 638)	6	47 988 (516 555)
No Site Plan Submitted			34 423 (370 538)		33 274 (358 170)	4	11 866 (127 729)	8		4	79 563 (856 437)
Draft Approved					12 110 (130 355)	2	2 915 (31 378)	2		1	15 025 (161 733)
Under Application for Development					18 580 (200 000)	2	1 800 (19 376)	1	6 258 (67 363)	10	26 638 (286 738)
Lands Designated, Not Under Application for Development					9 290 (100 000)	1	7 200 (77 503)	4			16 490 (177 503)
Additions									7 064 (76 039)	4	7 064 (76 039)
Total	197 227 (2 123 003)	2	304 157 (3 274 026)	10	296 494 (3 191 540)	47	178 162 (1 917 783)	116	195 534 (2 104 779)	56	1 137 151 (12 240 592)

Source: City of Mississauga Planning and Building Department

*GFA refers to Gross Floor Area

¹ Includes the following types of uses Mixed Use, Mixed Commercial and Employment. Some applications for this type of use do not indicate a GFA.

Industrial

Industrial Application Activity

December 1993	Heavy		General		Prestige (includes Office)		Mixed Industrial & Commercial		Total	
	Hectares	Acres	Hectares	Acres	Hectares	Acres	Hectares	Acres	Hectares	Acres
Unbuilt Registered Plans or Zoned Lands	59	146	373	922	688	1 700	114	282	1 234	3 049
Draft Approved	0	0	142	351	324	801	2	5	468	1 156
Under Application for Development	0	0	141	348	257	635	8	20	406	1 003
Lands Designated Not Under Application for Development	145	358	447	1 105	484	1 196	147	363	1 223	3 022
Existing	406	1 003	2 531	6 254	1 053	2 602	429	1 060	4 419	10 919
Total	610	1 507	3 634	8 979	2 806	6 934	700	1 730	7 750	19 150

Source: City of Mississauga Planning and Building Department

Retail Commercial

The existing gross floor area of retail space in the City of Mississauga as of December 1993 included approximately 950,000m² (10.2 million sq.ft.). District Centres comprise the largest portion with 29% of this space, followed by Regional and Neighbourhood Centres each representing 21%. Convenience and the Other category represent the smallest portions at 13% and 16% respectively.

Other than the unbuilt balance of the Britannia West District Centre, on-stream retail commercial space is made up of Neighbourhood, Convenience, and Other types of centres. On-stream, which includes unbuilt units on registered plans or zoned lands, draft approved, under application for development, totalled 192,000m² (2.1 million sq.ft.). Lands designated for retail commercial space but not yet under application include a total of 16,490m² (177,500 sq.ft.); 56% of this space is in the form of Neighbourhood Centres and 44% Convenience Centres.

As of December, 1993 the total retail commercial space, including existing, on-stream, designated lands and additions, is 1,137,000 m² (12.2 million sq.ft.) with District and Neighbourhood Centres representing 27% and 26%, respectively. Regional, Convenience and Other centres range from 15% to 18% of the total retail commercial space in the City. Although some opportunity exists for additional Neighbourhood and Convenience Centres in certain local areas, the City of

Mississauga has reached capacity for Regional and District Centres.

Industrial

At year end 1993 Mississauga had approximately 4,410 ha (10,900 ac) of land developed for industrial purposes. Most was designated as General Industrial (57%) followed by Prestige Industrial (24%), Mixed Industrial and Commercial (10%) and Heavy Industrial (9%).

Mississauga has a large inventory of land ready for development; 1,700 ha (4,200 ac.) of land are registered and zoned or draft approved for industrial purposes. A further 400 ha (1,000 ac.) of land are under application for development. Approximately 1,200 ha (3,000 ac.) of land are designated for industrial development but have not been developed and no application activity has occurred. Several permits were reissued, that is, where permits had been allowed to lapse, they were reactivated in 1993.

In 1993 several large developments received building permits. Among them were the new Price Club and Aikenheads in the Britannia Road West and Mavis Road area, the Unisource building on Courtney Park Drive and South Gateway containing retail, office and industrial. Industrial vacancies are expected to gradually decline in the next few years. Existing space will be absorbed since new construction remains slow. Mississauga has a good quality building stock and is well positioned to receive new growth and relocations. ♦

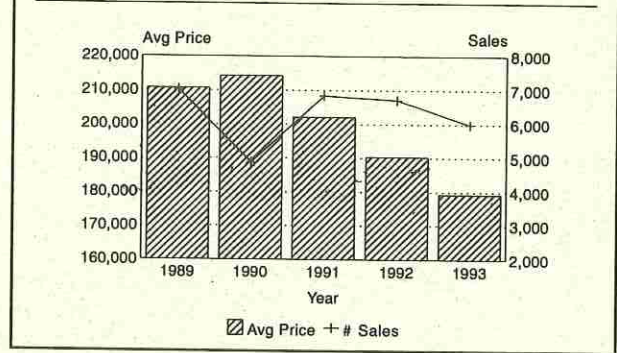
Housing Sales Data

Housing Starts

The Greater Toronto Area (GTA) had a total of 17,500 housing starts from January to December 1993, a decrease of 25% from the last year's total of 23,299 housing starts. The Region of Peel experienced 5,373 starts during 1993, compared to 7,104 during the same period in 1992, representing a decrease of 24%. The decline in Mississauga's new construction activity was similar to that of the GTA and Peel. The Mississauga total decreased by approximately one-fifth (22%) between 1992 and 1993, from 4,703 to 3,652 starts respectively.

The City of Mississauga plays a major role in new development activity. Mississauga contributes significantly to construction activity in the GTA as a whole, accounting for almost one-fifth (20.9%) of the total GTA starts in 1993, in line with the 20.2% recorded in 1992. Further, the City made up just over two-thirds (68.0%) of the total Peel Region housing starts from January to December 1993, remaining constant during the same period in 1992 (66.2%). Brampton and Caledon combined for the other one-third of the activity. Historically, Mississauga has maintained at least 54.6% of the total number of housing starts in the Peel Region between 1978 and 1993, and peaked with 73.8% in 1989.

MISSISSAUGA RESEAL ACTIVITY
1989 - 1993



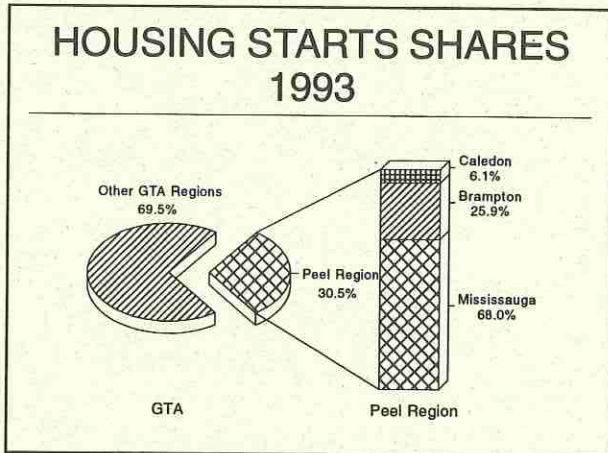
Resale Activity

The resale activity statistics provided by CMHC refer only to new listings for each month; listings are not carried over from month to month. Since 1989 the number of sales and listings in Mississauga has been fairly constant, with the exception of 1990 when there was a dip in activity - that is, more listings but less sales. The sales to listings ratio was only 11.9% compared to an average ratio of 19.9% from 1989 to 1993. Interestingly the average resale price in Mississauga was higher in 1990 when the sales to listing ratio was at its lowest than in any year from 1989 to 1993. The average resale price in Mississauga peaked in 1990 at \$214,261 and then began to decline. The average price was \$179,256 in 1993. Meanwhile, in the Toronto Branch Area the highest average resale price for December 1993 occurred in Oakville-Milton at \$217,448; the lowest in the Haliburton District at \$79,438, whereas the December average for Mississauga was \$187,468. The above chart reveals the trend concerning the average price and the number of sales independently, as well as their correlation.

New Home Sales

In December 1993, Mississauga's total sales were the strongest of the GTA areas reporting, (continued on page 8)

HOUSING STARTS SHARES
1993



1991 Census Employment Data for Mississauga

On June 4, 1991 Statistics Canada conducted the 17th Census of Population and Housing with the initial data announcements focusing on population and dwelling counts. Further releases contained information regarding employment including place of work data with origins and destinations of employed persons within regions and municipalities.

Employment objectives in the Mississauga Official Plan (1981) strive to provide both a sufficient number of jobs for the local labour force as well as to provide jobs that match the jobs skills of the resident population.

In 1991 the Census reported for Mississauga a population of 463,388 persons and 273,825 jobs. This translates into an activity rate of .59, or three jobs for every five residents. When those residents not active in the labour force (eg. children, retired persons, persons choosing not to participate in the labour force) are removed from the population figure, Mississauga has an estimated labour force of 231,000. Therefore, in 1991 there were approximately 42,800 more jobs available in Mississauga than could be filled by the local labour force.

Mississauga has done well in providing a sufficient number of jobs for its resident population, but what of the match between skills and jobs? Census place of work data provides some insight to this question. Of the 273,825 people working in Mississauga, 133,565 persons lived in Mississauga. Approximately 49% of the people working in Mississauga also lived here and approximately 58% of the resident labour force was able to work in Mississauga.

Given Mississauga's proximity to other municipalities and the large number of households with more than one person working, it is unrealistic to expect that all working persons living in Mississauga would work locally; however, there is room for improvement.

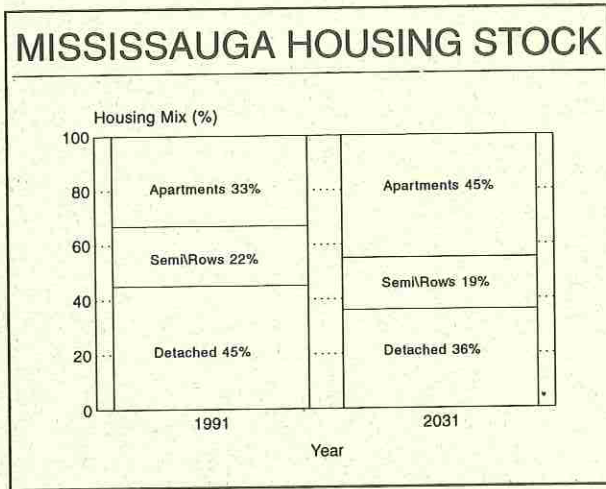
Mississauga has a highly skilled labour force and needs to attract employers offering employment opportunities attractive to people living here. The Official Plan (1981) has set aside lands that are well situated to the needs of businesses. These include several areas for office development. Also, an economic development strategy has been prepared that targets the biomedical, aerospace, automotive, information technology and distribution industries. These industries have been chosen for a variety of reasons, including their potential of offering jobs well suited to the skills of people living in Mississauga.

Matching the skills of the resident labour force with local jobs opportunities is important for several reasons. Keeping people who live in Mississauga working in Mississauga reduces the demand on the road system and makes the use of public transit more viable, which in turn lessens the strain on the environment. Also, by shorting the journey to work people have more free time which improves the quality of their life. ♦



DEVELOPMENT UPDATE

Mississauga Growth Forecasts (continued from page 1)



Mississauga has been a stronger performer in employment growth and is well positioned to capture new employment growth. Employment in the City of Mississauga is expected to almost double between 1991 and 2031, increasing from approximately 269,000 to 523,000. Mississauga has sufficient land designated to ultimately accommodate an employment force of 660,000. To fill these positions Mississauga will continue to be a net importer of labour. ♦

Housing Sales Data (continued from page 6)

233, more than twice the amount of the next highest area - Brampton and Scarborough reporting 102 and 81 sales respectively. Mississauga recorded 212 freehold and 11 condominium new home sales in December 1993. Therefore, Mississauga's total new home sales recorded just over one-quarter (28.4%) of the Toronto Branch Area sales (223 of 786). Mississauga's freehold new home sales consisted of just over one-third (34.6%) of the 613 sales in December 1993 in the Toronto Area. Further, condominium new home sales in Mississauga represented 6.4% of the 173 total sales (11). Of the 11 297 total new home sales in the Toronto Area between January and December 1993, Mississauga made up one-fifth (22.4%) of them (2,535). These statistics provide evidence of the large and important role the City plays in the activity of the immediate market area. ♦

DEVELOPMENT CHARGES

As a condition of building permit issuance, development charges, also referred to as levies, may be payable. Development charges are levied upon new development to help finance the costs of municipal facilities to service new growth. They are used to construct facilities such as major roads, storm drainage facilities, fire stations and community centres. In addition to the City of Mississauga's development charges, the City is responsible for collecting development charges on behalf of Hydro Mississauga and the Region of Peel

You may be required to pay Development Charges if you are constructing:

- a new residential dwelling unit,
- a non-residential building/structure (commercial, industrial, office, institutional, recreational, storage/warehouse), or
- an addition to a non-residential building/structure including mezzanines.

Development Charges do not apply to:

- additions to residential dwellings,
- accessory buildings on residential properties, or
- the replacement of residential dwelling units or non-residential gross floor area (provided a demolition permit has been issued).

To determine if development charges apply to your project and to obtain the current rates, please contact:

*Development Services
Planning and Building Department
4th Floor (905) 896-5517*



City of Mississauga, 300 City Centre Drive
Mississauga, Ontario L5B 3C1