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□ POLICY PLANNING DIVISION □

DEVELOPMENT UPDATE

THE CITY OF MISSISSAUGA PLANNING AND BUILDING DEPARTMENT

□ REPORT ON YEAR END 1992 □

Economic Development: A New Approach

The City of Mississauga has recently released the Draft City Plan ("the Plan") which proposes policies that will direct development into the next century. Included in the document are proposed economic development policies that will guide the location and type of business establishing in the City.

The Plan is an update of the existing Official Plan approved in 1981. Accompanying both the existing and the proposed Plan are a series of District Plans prepared for smaller areas of the City that provide specific locations for various types of activities and detailed policies for their development. The Plan is a draft document only and presently has no status. An extensive public participation exercise is now underway to solicit comment and input to the Plan which will be taken to Council late this year for recommended changes and City approval. After this the Plan will be submitted to the Ministry of Municipal Affairs for Provincial approval. All development applications will then be evaluated for their conformity to the Plan.

Fundamental to the Plan is a view that the economy, the environment, and the community are inextricably linked with actions in one sphere influencing the others. A strong economy is needed to ensure a healthy community and protect natural features; a pleasant community in which to live and a robust natural environment is attractive to business. Therefore, although the focus of this article is on the economic development policies of the Plan, policies relating to matters such as housing, environment, and urban design are also important to the economic health of Mississauga.

The long term concept for Mississauga is that it will be an *urban* municipality with a population of approximately 715 000 and employment in excess of 500 000. It will have a hierarchy of centres, the most significant being the City Centre. The Plan identifies 15 Employment Districts in addition to the City Centre.

Employment Districts may be designated Business Employment or Industrial. The Business Employment designation will allow for an integrated mix of business activities. The designation is very broad in what it permits in order to be responsive to a wide variety of business opportunities and future trends in how business is conducted. Common elements to the uses permitted is that they occur mostly inside of buildings and will be designed, sited and landscaped to present a prestige image. Businesses requiring extensive outdoor processing and storage areas will be permitted in Employment Districts under the Industrial designation.

Employment Districts will also contain Employment Centres and be the focus of office development. Three types of Employment Centres are identified in the Plan: the City Centre which will be the Primary Office Centre and contain the greatest concentration with densities ranging from a Floor Space Index (FSI) of 2 to 4; Secondary Office Centres will be major centres for office

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Mississauga Market Conditions

Housing

The existing housing stock in the City of Mississauga as of December, 1992 consisted of 161 078 units, an increase of 3% from 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 stock.

Construction activity for 1992 was characterized by an increase in building permits and housing starts, particularly in the townhouse market. Building permits increased 31% since this time last year and housing starts were up 21%. For detached units permits and starts were down; however, townhouse and semi-detached starts and permits were up significantly since this time last year.

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 25 000 units in this category of which 76% are apartments. The number of draft approved units is up from last year and now stands at almost 19 000 units. Again, apartments represent the biggest share. Lands under application for development but not yet draft approved remains relatively stable at approximately 28 000 units. The number of detached and semi-detached units in this category decreased somewhat while townhouses and apartments increased with apartments also dominating at 73%. Mississauga has lands to accommodate almost 50 000 units designated for residential development which are not developed or under application for development.

Improved opportunities in the housing market is evident by the 29% increase in residential resales from 1991 to 1992 for the month of December. This may be a result of the continued decline in the average resale house price which dropped by 6% and the three year mortgage rate down by almost 2 percentage points to 8.99%. Rental vacancy rates have continued to increased since 1987, reaching a rate 3.1% in October 1992. Average rents in 1992 increased slightly from the same period in 1991. Rents for one and two bedroom apartments increased by approximately 3% while bachelor and three bedroom rents increased by 1.2% and 0.5% respectively.

The Housing Strategy prepared for Mississauga proposes several targets for residential development. Sixty-four to 72% of the ultimate housing stock by type has been achieved for all but townhouses; only 50% of the target townhouse stock has been built.

Office Commercial

According to the Royal LePage Office Survey, the Toronto Census Metropolitan Area (Toronto CMA) has existing office space of 13.6 million m^2 (146.4 million sq ft) as of December 31, 1992. The vacancy rate increased from 17% in 1991 to 19% in 1992. New supply in 1992 decreased 50% from 1991 levels.

Metro West continues to attract tenancies from the entire CMA. The vacancy rate edged down to 24% after a record high rate of 26% in 1991. The Metro West market (Mississauga, Brampton, Oakville and Etobicoke) had 10 000 m^2 (109 000 sq ft) of new office space developed in 1992. The Metro West market is the most oversupplied market in the Metro region. Nonetheless, Royal LePage predicts that the vacancy rate will be below 20% by 1994 and will continue to fall as the appeal of low taxes and the suburbanization of Toronto bring businesses to the area.

The City of Mississauga has had considerable success with its City Centre marketing program, but the Airport districts remain the most popular location for tenants. It accounted for over half of Metro West's absorption. Vacancy rates increased drastically from 22% to 28%, again, due to the oversupply caused from the over building during the 1980s.

According to the projections prepared by Hemson Consulting Limited for the City of Mississauga, 1.47 million m^2 (15.8 million sq ft) of office space is forecast in Mississauga by 2001. Office vacancies are expected to be in the 6% range as a long term average.

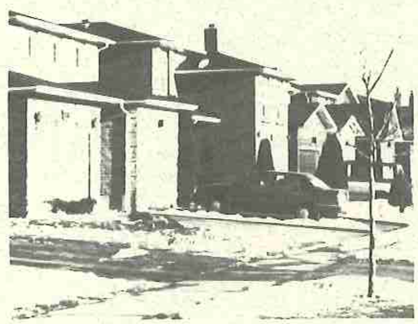
Housing

Housing Development Activity

Construction Activity 1992 Total	Detached	Semi-detached	Townhouse	Apartment	Total
Building Permits	2,090	543	1,813	1,247	5,693
Housing Starts[1]	1,983	412	971	1,337	4,703
Application Activity as of December 31	**Detached**	**Semi-detached**	**Townhouse**	**Apartment**	**Total**
Unbuilt Units on Registered Plans or Zoned Lands	3,651	154	2,069	19,101	24,975
Draft Approved	5,713	376	3,220	9,517	18,826
Under Application for Development	3,077	516	3,921	20,586	28,100
Lands Designated, Not Under Application for Development	16,328	508	11,976 35653	20,103	48,915
Existing Units	70,900	17,274	18,379	54,525	161,078
Total	99,669	18,828	39,565	123,832	281,894

Housing Market Indicators

(For the Month of December)	1991	1992	Increase or Decrease
Residential Resales[2]	202	260	Increased by 29%
Average Resale House Price[2]	$209,267	$196,773	Decreased by 6%
Three-Year Mortgage Rate[1]	10.97%	8.99%	Decreased by 18%
Average Rental Rate 2 Bedrooms (October)[1]	$777	$802	Increased by 3%
Rental Vacancy Rate (October)[1]	2.8%	3.1%	Increased by 10%



Housing Policy Targets

Housing Targets	Target	% Achieved
Dwelling Units		
Short Term Target	197,000	82%
Ultimate Target	245,000	66%
Ultimate Housing Stock		
Detached	98,000	72%
Semi-detached	24,500	70%
Townhouse	36,750	50%
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	1,136 (67%)
Non-Profit Units	550	795 (445%)
Average Annual Ownership Units	2,700	3,040 (125%)
Low Density (50%)	1,350	2,395 (79%)
Medium Density (35%)	900	645 (21%)
High Density (17%)	450	0 (0%)

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

Office Commercial

Year End 1992	Toronto Census Metro Area	Metro West	Mississauga
Total Space (in millions)	13.6 m^2 (146.4 sq.ft.)	2.3 m^2 (25.0 sq.ft.)	1.33 m^2 (14.3 sq.ft.)[1]
Vacancy Rate	19%	24%	28%
New Supply (in thousands)[2]	420 m^2 (4,520 sq.ft.)	10 m^2 (109.98 sq.ft.)	38 m^2 (411.5 sq.ft.)
% Share of Market	100%	17%	8%
Buildings	1,260	324	168[1]

Source: Royal Le Page
[1] City of Mississauga Planning and Building Department
[2] Some office space in Metro West was shifted to another node. Mississauga was not affected.

Retail Commercial

As of December, 1992	Regional		District		Neighbourhood		Convenience		Other[1]		Total
	GFA* m^2 (ft^2)	#	GFA m^2 (ft^2)	#	GFA m^2 (ft^2)	#	GFA m^2 (ft^2)	#	GFA m^2 (ft^2)	#	GFA m^2 (ft^2)
Existing	197 227 (2 123 000) ~~(22,852,529)~~	2	269 734 (2 903 487) (31,253,896)	10	197 128 (2 121 939) (22,841,108)	32	128 415 (1 382 297) ~~(14,879,407)~~	89	111 420 (1 199 351) ~~(12,910,129)~~	30	903 924 (9 730 074) ~~(104,737,066)~~
Unbuilt Units on Registered Plans or Zoned Lands:											
Approved Site Plans							11 200 (120,510)	5	5 769 (62,099)	3	16 969 (182,659)
Site Plans Submitted					23 648 (254,553)	4	5 416 (58,299)	5	18 827 (202,659)	4	47 891 (515,511)
No Site Plan Submitted					14 694 (158,170)	2	11 866 (127,728)	8	N/A	5	26 560 (285,899)
Draft Approved					21 400 (230,355)	3	4 715 (50,753)	3	N/A	3	26 115 (281,108)
Under Application for Development					29 357 (316,006)	4	3 602 (38,773)	2	15 311 (164,811)	11	48 270 (519,590)
Lands Designated, Not Under Application for Development					9 290 (100,000)	1	7 200 (77,503)	4			16 490 (177,503)
Total	~~2 123 000~~ ~~(22,852,529)~~	2	~~2 903 487~~ ~~(31,253,896)~~	10	~~2 220 928~~ ~~(23,900,193)~~	46	~~1 426 296~~ ~~(15,353,024)~~	116	~~1 239 258~~ ~~(13,339,698)~~	56	~~9 912 369~~ ~~(106,699,337)~~

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.

Retail Commercial

The existing gross floor area of retail space in the City of Mississauga as of December, 1992 consisted of 9.73 million m^2 (104.7 million sq ft). District Centres represent the largest portion of this space at 30% while Regional Centres have 22% and Neighbourhood Centres represent 21%. Convenience and the Other category of retail commercial space represent the smallest proportions at 14% and 13% respectively.

There is a supply of approximately 92 000 m^2 (990,300 sq ft) of retail space that could be brought onto the market quickly; these are unbuilt units on registered

Industrial

Industrial Application Activity[1]

December 1992	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	376	929	691	1,707	117	289	1 243	3,071
Draft Approved	0	0	110	272	324	800	9	22	443	1,094
Under Application for Development	0	0	156	386	282	697	8	20	446	1,103
Lands Designated Not Under Application for Development	145	358	442	1,092	483	1,193	147	363	1 217	3,006
Existing	406	1,003	2 527	6,244	1 050	2,595	420	1,038	4 403	10,880
Total	610	1,507	3 611	8,923	2 830	6,992	701	1,732	7 752	19,154

Industrial Statistics

	1991	1992
Building Inventory (sq.ft.)[2]	135.9 million	136.0 million
Available Space (sq.ft.)[2]	15.9 million	14.9 million
Vacancy Rate (%)[2]	11.0	12.0
Building Permits Value ($)[1]	126.6 million	112.9 million
Building Permits Issued[1]	24	17

Industrial/Commercial Land Values[2]

	Spring 1992	Fall 1992
General Industrial	$275,000-300,000	$200,000-225,000
Prestige Industrial	$325,000-375,000	$225,000-275,000
Prestige Industrial /High Exposure	$400,000-450,000	$300,000-375,000

[1] City of Mississauga Planning and Development Department
[2] Royal Le Page

plans or zoned lands including centres with approved site plans, centres where site plans have been submitted and lands where no site plan has been submitted. This category is entirely made up of Neighbourhood, Convenience and Other retail space; the City of Mississauga has reached it capacity in terms of Regional and District Centres.

The amount of retail space draft approved totals 26 000 m^2 (281,100 sq ft) and centres that are under application for development is 56 000 m^2 (603,600 sq ft). Again, it is the Neighbourhood, Convenience and Other types of centres which fall under the above categories of development.

Industrial

The total existing industrial land in the City of Mississauga as of December, 1992 is approximately 4 400 ha (10,000 ac). The proportions have remained the same with General and Prestige industrial lands making up the largest portions at 57% and 24% and Heavy and Mixed Industrial Commercial lands making up 9% and 10%. Mississauga has a large supply of industrial lands ready for building permits; these are unbuilt lands on registered plans or zoned lands and totals 1 200 ha (3,100 ac). The potential inventory of industrial lands includes draft approved lands, lands under application for development and lands designated not under application for development. These total 2 100 ha (5,200 ac), with the largest amount of this land designated Prestige industrial.

There were 17 industrial building permits issued in 1992 with a value of $112.9 million, a decrease of 30% from 1991. The available space increased slightly from 1991 with vacancy rates increasing in industrial building to 12%. Land values continue to drop. Between the spring and fall of 1992 industrial/commercial land values were down between 20% to 30%.

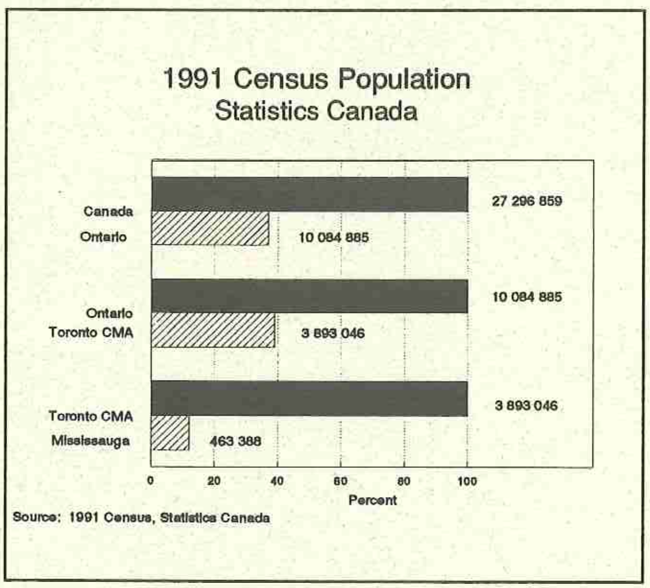
1991 Census of Population and Housing

On June 4, 1991 Statistics Canada conducted the 17th Census of Population of Housing with the initial data announcements focusing on population and dwelling counts.

Population

The 1991 Census population of Mississauga was 463 388 persons, an increase of 89 338 persons from the 1986 Census. This represents a growth of 24%. In the Toronto Census Metropolitan Area (Toronto CMA) Mississauga had the largest absolute increase and was fourth in terms of percentage growth. Mississauga is ranked the ninth largest municipality in Canada, the same ranking as in the 1986 Census.

The Toronto CMA grew by 13% since 1986 and had a total population of 3 893 046 persons as of June, 1991. The province of Ontario grew by 10.8% and reported a population of 10 084 885 persons. This exceeds the 7.9% national growth. Canada's population was 27 296 859 persons, an increase of approximately 2 million people.



Age Structure

The age structure in the City of Mississauga, from 1986 to 1991 has generally remained the same. The share of persons aged 0 to 24 decreased by 1%, persons aged 25 to 54 increased by 1% and the 65 to 75 age group remained the same.

CITY OF MISSISSAUGA AGE STRUCTURE: 1986 VERSUS 1991

Age Group	1986 Pop'n	% Share	1991 Pop'n	% Share	Pop'n Change
0-14	86 475	23	102 460	22	15 985
15-19	29 720	8	33 170	7	3 450
20-24	33 900	9	36 795	8	2 895
25-34	70 695	19	91 295	20	20 600
35-44	63 595	17	81 050	18	17 455
45-54	40 260	11	53 450	12	13 190
55-64	27 340	7	33 785	7	6 445
65-74	14 240	4	20 070	4	5 830
75+	7 775	2	11 315	2	3540
Total	374 000	100	463 390	100	89 390

Source: 1991 Census, Statistics Canada

Population by Mother Tongue

The proportion of Mississauga residents reporting English as their mother tongue (306 185) has decreased since the 1986 Census while those reporting French as their mother tongue (6 820) has increased slightly. After English and French the most frequently reported mother tongues were: Italian, Portuguese, Chinese, Polish and German.

Further Release Dates

The next releases from the 1991 Census will be regarding labour force activity, occupational groups, industry groups, educational attainment, school attendance, fertility, mobility, migration, income, religion, place of work, households and families.

A New Approach *(continued from p.1)*

development with an FSI of 1 to 2; Tertiary Office Centres will be characterized by low-rise buildings and an FSI of 0.5 to 1. Office development outside these centres will be restricted to an FSI of less than 0.5. The Plan identifies the City Centre and the location of Secondary Nodes. District Plans will identify Tertiary Office Centres and area specific policies.

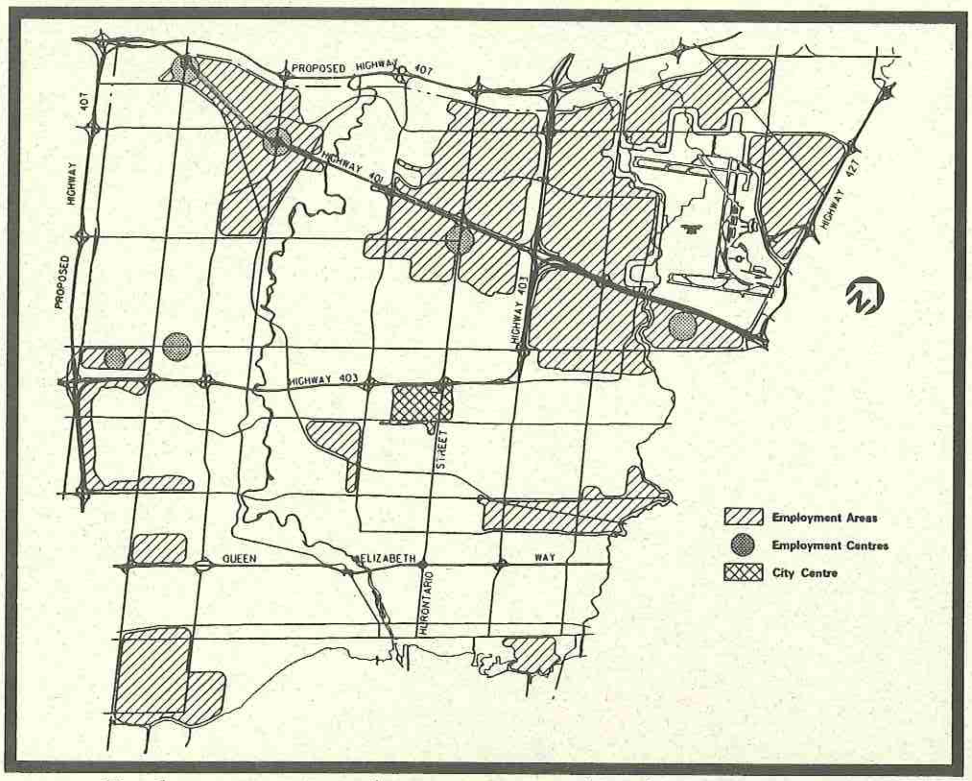
Retail Commercial uses will continue to be developed in accordance with an established hierarchy based on the City Centre containing the greatest concentration and variety of retail activities followed, in order of size, by Regional, District, Neighbourhood and Convenience Commercial Centres. As well, the Mixed Commercial designation, which encourages pedestrian-oriented and street-related development, will apply to primarily older commercial areas of the City.

Emerging trends in the retail industry has necessitated that a new category, Special Purpose Commercial, be included in the Retail Commercial policies to accommodate large scale non-shopping centre retail facilities with a regional draw and a requirement for large land parcels and exposure to traffic. Mississauga examples include the Home Centre and the Price Club.

A need for retail uses in Employment Districts is also recognized. Conventional thought on employment based retail uses was to restrict it to uses that directly served the needs of business with other retail uses being directed to commercial facilities in residential areas. However, there is a high demand for convenience and personal uses in employment areas. To respond to this demand while still reserving lands for manufacturing, wholesale trade, communication and similar types of industry, and without jeopardizing residential based commercial facilities, an Employment Commercial designation is proposed.

Automotive Service Commercial will identify lands for gas stations and automobile maintenance and Arterial Commercial will allow establishments which are not usually accommodated by traditional shopping centres and have locational requirements suitable to arterial locations.

For more information about the Employment Policies of the Draft City Plan call the Official Plan Review hotline at 896-5732.



Employment areas and centres proposed in the Draft City Plan

The Assessment Ratio

Mississauga strives to maintain an appropriate relationship between residential and non-residential assessment in order to maximize City revenues and minimize expenditures. The residential to commercial assessment ratio is frequently used as a barometer of how well the City is doing in this regard; however, the assessment ratio and what it means is often misunderstood.

In accordance with the *Assessment Act*, realty assessment is divided into two main taxable categories - residential and commercial realty assessment. A third category, business assessment, is levied directly against businesses.

Residential assessment refers to the value placed on those properties taxed at the residential mill rate. These include residential and farm properties, vacant lands regardless of zoning categories, vacant commercial and industrial buildings or portions thereof. The phase "residential assessment" is a misnomer. It does not mean that the assessment applies only to residential properties, but covers all properties that are *not occupied by a business.*

Commercial assessment refers to the value placed on properties taxed at the commercial mill rate. These include commercial and industrial properties that are *occupied by a business.*

Business assessment is levied on the actual businesses occupying commercial or industrial properties and is in addition to the commercial assessment. The business assessment is calculated by multiplying the assessed value of the property by a business percentage rate which is specific to the business. For instance, the business percentage rate for manufacturing establishments is 60%, and for professional offices it is 50%.

As an example, if a building is half occupied by a business and the rest is vacant, only 50% of the assessed value plus the business assessment will be taxed at the commercial mill rate. The vacant portion will be taxed at the residential mill rate.

Using the *Assessment Act* definitions, the 1992 residential to commercial assessment ratio for Mississauga was 66.25 to 33.75. In 1982 this ratio was 68.19 to 31.81. Between 1982 and 1992 the average annual compound growth rate was higher for commercial (6.1%) than for residential (5.3%) assessment.

Overall, Mississauga improved its commercial assessment to a peak in the 1990 taxation year (35.32), but this ratio dropped in 1991 and 1992. This decline is probably because of a greater number of vacant commercial-industrial properties due to a poor economy, and an oversupply of office space.

Although the residential to commercial assessment ratio is an indicator of economic development, it does not reflect the true picture as the assessed values of vacant commercial-industrial improved (ie. developed) properties (VCR) are taxed at the residential mill rate.

If the assessed values of the VCR are also subtracted from residential assessment and added to the commercial assessment, the adjusted commercial assessment ratio for 1992 would be 38.89 rather than 33.75. Except for a small decline in 1986, when the rate of increase in residential development exceeded that of commercial-industrial development, the adjusted commercial assessment ratio in Mississauga has been increasing. (If data were available to further adjust the assessment ratio by moving undeveloped commercial and industrial lands from the residential to the commercial assessment, the adjusted commercial ratio would be even higher.)

Overall, the residential to commercial assessment ratio in the City has gradually improved during the past 10 years. The adjusted ratio in 1992 is 61.11 residential compared to 38.89 commercial, which almost achieves the "magical target" 60/40 split sought after by many municipalities.

MISSISSAUGA

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