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EMPLOYMENT LAND REVIEW STUDY



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Consulting Ltd.

June 2008

HEMSON

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June 3, 2008

Ms. Angela Dietrich
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Dear Ms. Dietrich:

Re: City of Mississauga Employment Land Review Study

We are pleased to submit the following report, which provides a review of the City of Mississauga's employment land supply and conclusions on where and what types of changes may be appropriate.

The conclusion is that the majority of the City's employment land supply should be retained for continued employment purposes, and that only limited changes are appropriate for compelling land use planning reasons.

We trust that our recommendations are of assistance to staff and Council as they make plans for the future. We would like to thank City staff for their valuable input during the preparation of this study.

Yours truly,

HEMSON Consulting Ltd.



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EXECUTIVE SUMMARY

This report provides a review of the City of Mississauga employment land supply and recommendations for new policy directions to be considered as part of the City's official plan review and the required conformity with the 2006 Provincial *Growth Plan for the Greater Golden Horseshoe* (the *Growth Plan*).¹ Employment land, for the purposes of this report, are the industrial-type lands primarily located in the City's Employment Districts. Employment in commercial, office and institutional uses outside the Employment Districts is not addressed in this assignment.

While the entire employment land supply is reviewed, the focus is on responding to some of the challenges facing the City's mature Employment Districts, including pressure for conversion to other uses. The key findings are as follows:

- The City of Mississauga has a large and competitive employment land supply. Mississauga's employment land supply is one of the largest in the Greater Toronto Area and Hamilton (GTAH). Mississauga is nearing full development of its vacant urban land.
- The City's supply of vacant employment land is limited, consistent with the profile of a nearly fully built-out community. The vacant employment land supply consists primarily of smaller sites scattered throughout the developed Employment Districts and a small number of additional vacant employment land parcels scattered throughout the City's residential planning districts.
- The City's occupied employment land supply is well-developed, with relatively high building and employment densities and low building vacancy rates observed for all of the Employment Districts. There are also small pockets of developed industrial land outside the Employment Districts.
- The occupied employment land supply has developed largely as planned, with only a limited number of non-industrial-type uses, including residential and various institutional uses such as schools, community facilities and places of religious assembly.
- The trend towards accommodating these types of institutional uses on employment land is expected to continue, as the City's land supply becomes more constrained for all types of uses, and the City makes the transition to a fully developed mature community with more "central place" functions.

¹ This report is a "municipal comprehensive review" of the employment land supply within the meaning of the Provincial Policy Statement and the Growth Plan.

- All of the City's Employment Districts play a key role in accommodating economic activity. The following key points warrant attention:
 - The newer Employment Districts in the northern part of the City are home to major concentrations of economic activity, particularly within the very large areas surrounding the Lester B. Pearson International Airport (LBPIA), with an emphasis on traditional industrial activities including manufacturing, goods movement and distribution.
 - The City's older Employment Districts in central and southern Mississauga play a key role in accommodating economic activity through the use and reuse of older industrial space.

The City's older Employment Districts continue to house many of their original manufacturing occupants, but also accommodate a range of uses which value a central location or access to the surrounding community, such as small office and service-type uses, for which relatively low-cost, existing built space is an advantage.

- The Southdown District is distinct from other districts in the City due to the concentration of traditional industry. While often seen as visually less attractive with operational impacts that are not compatible with non-industrial uses, the industrial properties in Southdown accommodate valuable economic activities. Southdown plays an important role in accommodating this specific type of industrial activity.

- Scattered employment sites outside of the Employment Districts also play an important role in accommodating economic activity by providing space for a range of viable economic activities. They are quite stable in most parts of the City.
- However, some of the larger vacant or under-utilized parcels located outside of the Employment Districts do present a challenge for development. For example, some of the larger industrial properties along the waterfront in Port Credit and Lakeview will be a challenge to develop due to a combination of their location and potential impact with surrounding uses, and the possibility of site contamination.

Given this profile of land and building occupancy, and City and Provincial planning policy directions, our report presents the following recommendations regarding the City's policy direction for Employment Districts.

- For the most part, no change should be considered for the City's northern areas around the Lester B. Pearson International Airport and those to the south and east along Highway 403. All of these areas remain competitive and suitable for continued employment land uses.
- A minor change to the boundary of the Airport Corporate Employment District has already been recommended in the City's office strategy. We agree that it may be appropriate to expand the market area and land supply to allow a concentration of major office development in this location.

- A wider range of economic use may be appropriate for a parcel in the Meadowvale Business Park to the west of Winston Churchill Boulevard. There is also a small parcel in Streetsville at the intersection of Britannia and Mississauga Roads and the area abutting it in the Meadowvale Business Park that should be considered for a wider range of uses.
- Some change may also be appropriate for some arterial road frontages of older Districts, particularly in the Mavis-Erindale and Dixie areas. The low-density pattern of use along Burnhamthorpe Road may provide an opportunity for a mixed-use gateway to the City Centre, and the Dundas Street frontage of the Dixie District may provide an opportunity for mixed-use development along the proposed transit corridor.
- The Southdown Employment District should be retained largely as currently designated, that is, as a location to accommodate mainly industrial uses. Some reorientation of the area to make more efficient use of the land supply may be desirable from an economic development perspective, but care needs to be taken to avoid generating land use conflicts with any of the large long-standing traditional industrial uses in the area.

- Conversion of scattered vacant sites within Employment Districts is not appropriate because they remain part of the long-term employment land supply of the City and the potential for land use conflicts and area destabilisation is high.
- Carefully managed change to other urban uses may also be appropriate for some scattered sites throughout the City's Residential Districts. Within this category, changes should be considered on the merits of the use and the characteristics of the site within the context of the City's other objectives and planning initiatives, such as the transit strategy and the Port Credit and Lakeview visioning processes.

To implement these recommendations, three main policy directions should be followed:

1. Strong policies for employment land retention should be included in the new official plan, setting out the rationale for protecting the vast majority of the employment land supply as currently planned;
2. Site-specific policies and designations should be developed for those areas where some change may be considered appropriate. Where the preferred land use is known, that designation should be put in place. Where a number of potential land uses are possible, a special policy area could be implemented with land use determined through future work; and

3. Minor additional updates to City-wide policies for employment land should be made, generally reflecting the City's transition from a suburban greenfield to a more mature community.

New policies could include maintaining the competitiveness of developed areas, highlighting the role employment land plays in supporting transit use, guidelines for community uses on employment land, the trend towards converting multi-unit buildings to condominium arrangements, and other more specific issues, such as the site orientation of office buildings, surface parking, daycare and outdoor storage.

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I INTRODUCTION

Hemson Consulting Ltd. was retained in August 2007 to undertake a review of the City of Mississauga's employment land supply and recommend new policy directions to be considered as part of the City's official plan review.

The overall purpose of the study is to review the City's employment land supply and to identify the employment land policy directions that are required to maintain Mississauga as a major employment concentration within the Greater Toronto Area and Hamilton (GTAH) as it makes the transition from a fast-growing suburban community developing greenfield land to a more mature, slower-growing and increasingly urban City.

For the purposes of this review, employment land is defined as the lands designated for employment uses in the nine Employment Districts identified in the Mississauga official plan. In addition, some smaller occupied areas and other scattered parcels that are not within the designated Employment Districts, but designated for either *Business Employment* or *Industrial* in the City's Residential Districts were considered in this review.

This report, in turn, focuses on employment within the City's employment districts, which includes industrial employment and business commercial employment, including retail.

In this report, employment areas in Mississauga are referred to as the Employment Districts — i.e. the Northeast Employment District, or the Airport Corporate Employment District.¹

The two exceptions are the Meadowvale and Western employment areas, which are referred to as Business Parks, as currently identified in the City's official plan. Although these two areas are labelled as Business Parks, they have been included as Employment Districts for the purposes of this analysis.

All of the City's Employment Districts are reviewed as part of this study. A specific focus, nonetheless, is on the challenges facing the City's mature Employment Districts, including pressure to convert employment land to other uses. The City will need to develop policies to protect the employment land supply, but will also need to identify those areas where some change may be appropriate for sound planning reasons.

¹ *Mixed-use and retail lands in the Mississauga City Centre are not included, although they are counted in the City's 2007 vacant employment land inventory. For detail see the 2007 Vacant Employment Lands report, prepared by the Planning and Building Department.*

A. FOCUS OF THE STUDY IS ON MISSISSAUGA'S MATURE EMPLOYMENT DISTRICTS

The issue of Mississauga's transition to a mature urban community and the implications for employment land has been documented in a number of reports, including:

- *A Review of Long-Term Employment Land Needs*, prepared for the City of Mississauga in 1997.
- *Long Range Forecasts, City of Mississauga 2006 to 2031*, prepared for the City of Mississauga in 1998;
- *Growth in a Maturing Community*, prepared for the City of Mississauga in 2003; and
- *Understanding Employment Land in the Region of Peel*, prepared for the Regional Municipality of Peel in 2005.

The conclusion of these and other related studies has been consistent — that the City of Mississauga will remain a major employment concentration within the GTA but is entering a period of transition during which it will move from a fast-growing City based on greenfield development to a more mature, and slower growing urban area. This shift will have a number of implications for long-range planning, including planning for employment land.

1. Mississauga's Shift to a Mature Community Has Implications for Employment Land

As described in *Growth in a Maturing Community*, the growth outlook for the City of Mississauga is determined largely by the greenfield land supply, which is anticipated to be depleted within a few short years.

As a result, during the period from now to 2011, the City will begin to shift from a fast-growing suburban community at the edge of the Greater Toronto Area (GTA) to a more central, more mature, and fully built-out urban community within the Greater Golden Horseshoe (GGH). This shift has several key planning implications:

- As the City of Mississauga builds out its greenfield land supply for lower density housing and employment land, the overall rate of growth will slow;
- New housing and employment growth will be provided through more intensive forms of development, particularly apartments for housing and major offices for new jobs;
- In employment, the City will begin to assume more "central place" functions, which include concentrations of producer services, government, health care and education services that serve the population and businesses of the broader economic region.¹

¹For details on the nature of employment growth in older, central urban areas see *The Growth Outlook for the Greater Golden Horseshoe*, prepared by Hemson Consulting Ltd., 2005.

- As the City of Mississauga's economic base matures, the focus of economic development will shift from attracting new investment to business retention and ensuring that existing businesses are satisfied;
- There will also be growing pressure to change land use designations, including pressure to convert employment land to other non-employment uses, due mainly to growing market opportunities for more intensive residential development and a widening value differential between employment and non-employment land.¹

The role that the City's mature Employment Districts will play is an important consideration in the context of the City's transition to a more mature community, the rise of more central place functions and the pressure to convert employment land to other uses.

¹ Residential and increasingly major retail lands have a higher market value than employment land in nearly every urban circumstance. The reason is that they can be developed more intensely and in a shorter time frame, meaning a greater and quicker return on investment to the private landowner. The difference in land value produces a strong incentive to seek changes to these types of land uses.

2. A Wider Range of Use May Be Appropriate for Some of the City's Mature Employment Districts

As the City makes the transition to a more mature community, a wider range of use may be appropriate for some older Employment Districts. As described in *A Review of Long-Term Employment Land Needs* (1997), industrial buildings and business parks typically have a lifespan of approximately 30 to 40 years in their initial use²:

- Initially, nearly every new business park follows a pattern of maximising employment density while it is relatively new and at its most productive, with relatively little turnover in occupancy during the first three decades.
- This is followed by a period of gradual change, where many of the original users leave and the buildings are reused, often by a lower intensity use. Vacancy rates tend to rise and employment densities tend to decline due to the turn-over and ownership changes.
- This pattern is well-established in the older industrial areas of the GTA central cities of Toronto and Hamilton.

² 40 to 50 years may be a more accurate description. When the 1997 report was written, just at the end of the long 1990s recession, and an observed trend of more rapid obsolescence may in fact have been related more to cyclical factors of the day.

Although nearly all of Mississauga's supply of industrial building space is relatively new, built largely in the last 30 to 35 years, some of the City's original industrial areas to the south and along the lakeshore are now entering a period where significant change may start to occur.

3. The Key Issue Is Where and What Types of Change Should Be Permitted

Some carefully managed change may be appropriate for the City's more mature Employment Districts, particularly in the vicinity of existing or planned higher-order transit, where employment intensification or other types of re-investment may be possible. The key issue is where and what type of change is appropriate. On the matter of type, two potential changes are being considered:

- Potential changes to permit a different or wider range of employment uses within existing employment districts; and
- Potential changes to convert employment land to other non-employment (retail, commercial, residential and institutional) types of use.

The question of where such change may be appropriate is addressed through a consideration of a wide range of land use planning factors, including:

- The adequacy of the employment land supply to accommodate forecast employment growth;

- The types of economic activities currently accommodated on employment land and the role that different employment areas play in the City;
- Opportunities for employment intensification or other types of re-investment;
- The suitability and competitiveness of the City's employment areas for continued employment use; and
- The potential for land use conflicts that may be introduced by non-employment uses.

Provincial and City policy objectives for employment land are also a key consideration, as they provide clear direction on employment land and economic development.

B. PROVINCIAL AND CITY POLICY OBJECTIVES ARE A KEY CONSIDERATION

One of the major objectives of new Provincial policy initiatives, particularly the *Growth Plan*, as well as the City of Mississauga's official plan, is to promote economic development, economic vitality and employment growth. Providing and maintaining an adequate supply of employment land is considered very important for achieving these goals.

At the same time, however, both City and Provincial policy objectives have identified the need to promote the development of a more compact urban form, in part through the redevelopment and intensification of the existing built-up area. These two objectives need to be carefully balanced in addressing the issues of where, and what type of change may be appropriate for employment land.

1. New Provincial Policies Seek to Minimize Employment Land Conversion

The Province of Ontario has recently undertaken a number of planning policy and growth management initiatives that affect Mississauga's employment land planning, particularly the 2006 *Growth Plan*, the 2005 *Provincial Policy Statement* (PPS) and recent amendments to the *Planning Act* (often referred to as Bill 51).

Taken together, these new Provincial policies generally seek to promote economic vitality and discourage the conversion of employment land to other uses:

- Overall, the Provincial *Growth Plan* places a strong emphasis on economic development and sets out strict criteria regarding the conversion of employment land to non-employment uses.¹

¹ *The conversion policies can be found in Section 2.2.6.5, which states generally that conversions of employment land may only be permitted through a municipal comprehensive review and where a series of tests are met.*

- Under the *Growth Plan*, major retail uses are not considered employment uses (Section 2.2.6.5). Although these uses still generate jobs, for long-range planning purposes under the new Provincial initiatives they are excluded.
- Similar to the *Growth Plan*, the PPS states in Section 1.3.2 that conversions may be permitted through a comprehensive review, only where it has been demonstrated that the land is not required over the long-term and there is a need for the conversion.

The *Growth Plan* and PPS policies are further reinforced by Bill 51, which seeks to strengthen the municipality's ability to refuse applications to convert employment land by removing the private applicant's ability to appeal such applications to the Ontario Municipal Board.

Although new Provincial policies place an emphasis on protecting employment land, it is also recognized that changes in use or conversion of employment land may be appropriate in some circumstances. These new policy directions provide a great deal of guidance on the overall policy direction for employment land in Mississauga, however, by seeking to limit conversions to other uses.

This report represents a "municipal comprehensive review" of employment land in the City of Mississauga, as the term is defined by the PPS and the *Growth Plan*. The completion of a municipal comprehensive review is one of the new minimum requirements needed to allow the City to make changes to its employment land if it so desires.

2. City of Mississauga Has a Long-Standing Policy of Protecting Employment Land

The City of Mississauga has a long history of actively pursuing economic development opportunities, primarily through the provision and protection of opportunities for employment land development. This policy direction is reflected in both the *Strategic Plan* and the Mississauga official plan:

- The vision in the City's *Strategic Plan* is for Mississauga to be a significant regional employment centre in excess of 500,000 jobs, translating into an increase of about 75,000 jobs from the 2006 Census employment of approximately 425,000 jobs.¹
- Employment is also a principal theme of the *Mississauga* official plan, which states that the City will have a strong and diverse economic base and will continue to be a net importer of labour within the GTAH.

¹ The City's 2006 Census employment is different than the total that is shown in the City's 2006 Employment Profile report, prepared by the Mississauga Planning and Building department. This is because the employment survey is not able to capture all of the "work at home" and "no fixed place of work" jobs that are reported in the Census place of work data. In 2006, the City of Mississauga reported a total of 406,000 employees and in 2007 reported a total of 416,000 employees.

The provision of a large and competitive supply of employment land has been the key tool through which the City has implemented these objectives. Likewise, maintaining the remaining greenfield employment land supply and carefully planning for the future of its mature employment areas will play a key role in ensuring that Mississauga remains a major regional employment concentration as the City makes the transition to a mature and fully built-out state.

A full consideration of the City's employment land base requires more than just a consideration of the City's economic policies. As always in planning, all relevant policies need to be considered. In addition to the economic policies of the City, there are other relevant policies such as those supporting the office sector, those seeking appropriate redevelopment in the City and those concerning the need for transit investments to support more intensive land use.

3. The "Need" for Change Is Considered from the Perspective of Achieving These Goals

For the purposes of this study, the issue of what types of changes, if any, should be considered for the City's employment land supply is considered in the context of the City's transition to a mature community and clear Provincial and City policies to promote economic vitality, and to provide and protect an adequate supply of employment land to accommodate future job growth.

As a result, the notion of the “need” to make changes to the employment land supply, including the potential to convert employment land to a non-employment use, is considered from a land use planning perspective. The following points warrant attention in this regard:

- From a land use planning perspective, there is only a “need” to change uses or convert employment land if it is required to achieve a City of Mississauga or Provincial planning policy objective, such as employment intensification or the promotion of transit-oriented development.
- This is very different than the notion of a “need” to change uses or convert employment land from the private landowners’ perspective, which is determined mainly by the presence of market demand.
- Given that there is market demand for all types of urban development in Mississauga, and that the Provincial *Growth Plan* and *Mississauga Official Plan* both seek to achieve specific economic development and employment land objectives, the issue of where and what type of change may be appropriate is considered from this perspective.

For these reasons, this report does not recommend major changes in the planning of employment land in Mississauga. Instead, recommendations are made to assist the City in putting in place a framework that allows for some limited change to occur — where appropriate compelling local land use planning reasons are identified — without significantly accelerating declines in the size and diversity of the City’s economic base, which would be contrary to both City and new Provincial policy objectives for economic development.

C. THIS REPORT IS ORGANIZED INTO FOUR CHAPTERS

The following report provides a review of the City of Mississauga employment land supply, with a specific focus on the City’s mature employment districts, and reaches conclusions on where, and what type of changes may be appropriate. It is organized into four chapters.

- This introduction provides an overview of the overall objectives of the study and the policy context in which its major conclusions are reached.
- Following this introduction, the second chapter provides a review of the employment land supply, including the occupied and vacant supply, densities, the economic activities accommodated and the adequacy of the supply to accommodate future demand. Conclusions are provided on the areas in the City of Mississauga where no changes to the employment land supply should be considered.
- The third chapter turns to a discussion of the areas where some changes may be considered, including the results of field work and a number of working sessions held with the study Working and Steering Committee comprised of staff from City Departments. Conclusions are provided on the types of changes that may be considered for these areas.
- Based upon these conclusions, the final chapter recommends a number of new official plan policy directions, including the overall policy framework, conversion policies and direction for specific areas within the City.

This report is intended to provide direction on the future of employment land development in the City of Mississauga, and recommend new policies to be considered by City staff. Specific policies, including the necessary official plan amendments, will be determined through more detailed work including a consideration of other studies being undertaken, such as the study of nodes and corridors, the office strategy study, the Port Credit and Lakeview District Policies Review and the transit ridership growth strategy.

II MISSISSAUGA HAS A LARGE AND COMPETITIVE SUPPLY OF EMPLOYMENT LAND

This chapter presents an overview of Mississauga's employment land supply, including the occupied and vacant supply, the profile of the vacant inventory, land use designations and employment densities, as well as a description of the types of economic activities and built forms that are accommodated throughout the City.

The City of Mississauga has performed very well in the GTAH employment market over the past three decades. Mississauga has a large employment base of over 425,000 jobs, accounting for 70% of Peel Region employment, and continues to be a net importer of labour within the GTAH.¹

One of the main reasons for the City's success is a large and competitive employment land supply, which is nearly fully developed. A wide range of economic activities are accommodated, with major concentrations of traditional industrial activity.

¹ 2006 Census results indicate Mississauga, Vaughan, Markham, Newmarket and Toronto are the only municipalities in the GTAH that are net importers of labour — Mississauga had a 2006 resident employed labour force of just over 350,000 compared to the total jobs in the community of just over 425,000. These five communities also have the highest activity rates, with Vaughan the highest at 64% and Mississauga just below at 63%, compared to a GTAH average of 53%.

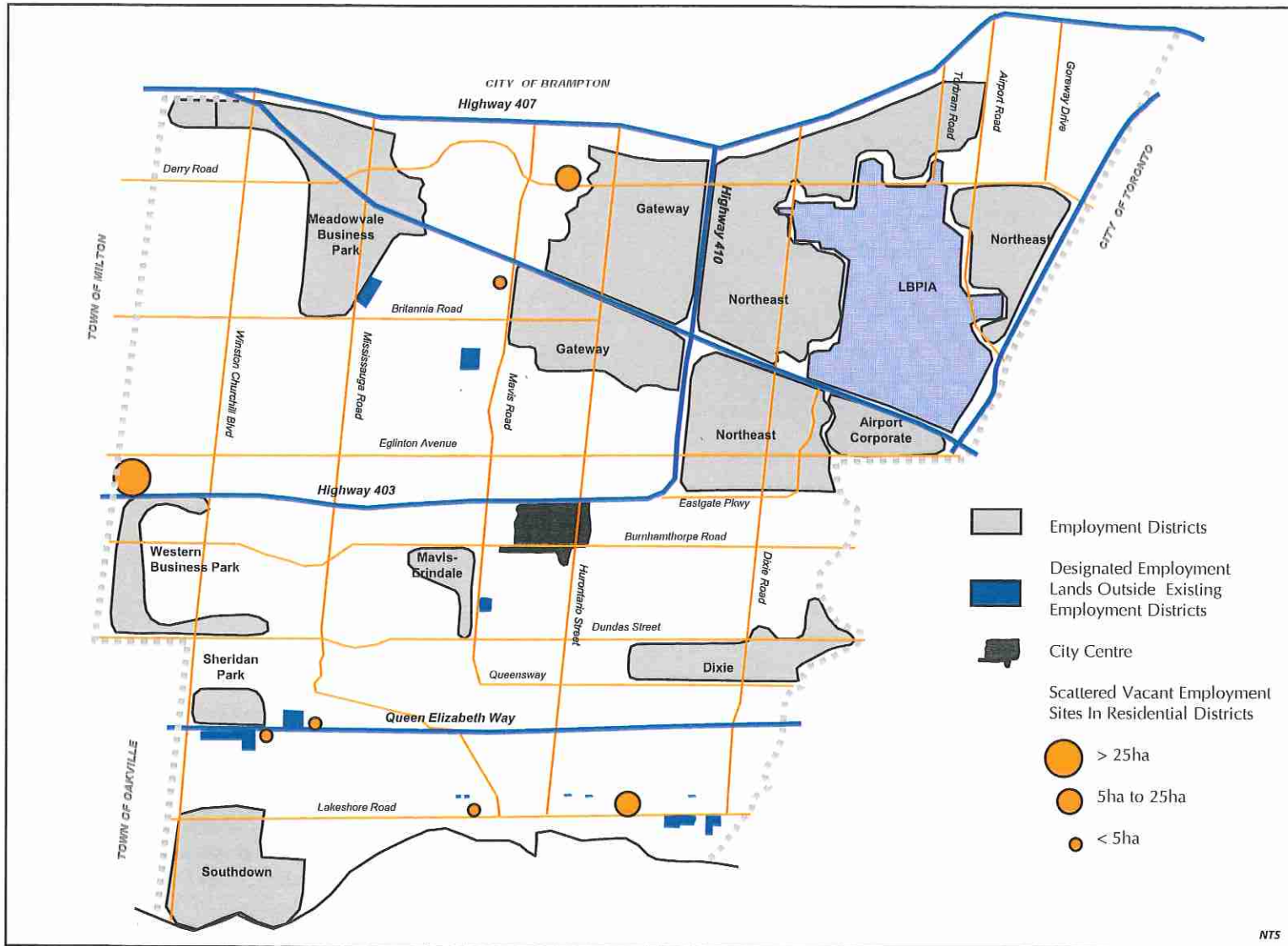
A. MISSISSAUGA'S EMPLOYMENT LAND SUPPLY IS NEARLY FULLY DEVELOPED

Mississauga has the largest supply of employment land in Peel Region and one of the largest supplies in the GTA. These lands contribute substantially to the City's economic base, and provide a major contribution to local employment.

Nearly all of the City's employment land supply is developed, the result of the City's age and a combination of good employment land planning, resistance to conversion pressure, provision of services, a competitive location and a well-developed transportation network. The City has a total designated supply of approximately 6,480 net ha of employment land, of which approximately 5,510 ha, or 85%, is occupied.

The employment land supply is primarily located in the City's nine designated Employment Districts, particularly the large areas around LBPIA, with a small additional amount in smaller occupied areas and vacant sites within some of the City's Residential Districts. The City of Mississauga's employment land supply is illustrated on Map 1 on the following page.

MAP 1: CITY OF MISSISSAUGA EMPLOYMENT LAND SUPPLY



Note: Map is conceptual.
 Source: Hemson Consulting Ltd, based on The City of Mississauga Official Plan

NTS

1. Employment Land Supply Is Concentrated in the North and West

Mississauga's employment land supply is heavily concentrated in the north, particularly in the large areas around the LBPIA, and to the west along Highway 401 in the Meadowvale Business Park. The remainder is distributed in smaller, older areas throughout central and southeast Mississauga.

- The Employment Districts around the LBPIA include the Gateway, Airport Corporate and Northeast Employment Districts. The concentrations of employment development in the vicinity of LBPIA extend beyond Mississauga into Toronto in the Rexdale area and into Brampton in the area around Airport Road.
- There are two smaller employment areas in central Mississauga: the Mavis-Erindale and Dixie Employment Districts; which are located along major arterial roads and within areas that are now well-established with residential uses. The Dixie Employment District forms part of a much larger employment concentration entering into Toronto in the South Etobicoke Employment District.
- To the southwest, there are three other employment areas: the Western Business Park, the Sheridan Park Employment District and the Southdown Employment Districts, the last of which is the City's primary concentration of traditional industry.

- There are also some scattered vacant employment land parcels within the City's Residential Districts, and some other smaller pockets of development employment land in other areas such as the Lakeview and Port Credit Residential Districts.

2. Approximately 5,510 Net Ha Are Occupied and 970 Net Ha Are Vacant

Of the City's total employment land supply of 6,480 net ha, approximately 85%, or 5,510 net ha are occupied. The remaining 970 net ha, or about 15% of the supply, is vacant. The City of Mississauga's employment land supply is summarized in Table 1, which shows the estimated net occupied and net vacant supply by area for 2008. At 85% developed, the City's employment land supply is rapidly nearing full build out.¹

¹ The net supply is adjusted to account for land that will be lost to roads and other servicing for larger parcels in the inventory. Employment land supplies are considered to be fully built out at 95% development. This is because the "tail end" of the employment land supply is typically made up of sites that are a challenge to develop, and remain vacant over the long-term. This is referred to as "long-term vacancy" for the purposes of employment land planning.

| Employment Districts and Business Parks | Total | Occupied | Net Vacant | Percent Vacant |
|--|--------------|--------------|------------|----------------|
| Northeast | 2,530 | 2,350 | 180 | 7% |
| Gateway | 1,220 | 1,030 | 190 | 16% |
| Meadowvale BP | 850 | 630 | 220 | 26% |
| Southdown | 580 | 430 | 160 | 27% |
| Dixie | 390 | 370 | 20 | 6% |
| Western BP | 270 | 220 | 50 | 18% |
| Airport Corporate | 190 | 150 | 40 | 22% |
| Mavis-Erindale | 170 | 160 | 10 | 8% |
| Sheridan Park | 110 | 70 | 40 | 39% |
| Supply Outside the Designated Employment Districts | 170 | 130 | 50 | 27% |
| Grand Total Supply | 6,480 | 5,510 | 970 | 15% |

Source: Hemson Consulting Ltd. based on City of Mississauga Planning and Building Department data.

Notes: Totals may not add due to rounding. The nine Employment Districts are designated primarily for *Business Employment* or *Industrial* land use, although there are also some commercial designations within the supply. The supply outside the designated Employment Districts is made up of the scattered parcels not within the designated Employment Districts, but designated for either *Business Employment* or *Industrial* use.

Net vacant supply is adjusted for parcels greater than 10 ha as shown in the City's 2008 inventory. The total (gross) area of these parcels is reduced by 15%.

3. Only a Small Portion Is Considered Readily Available for Development

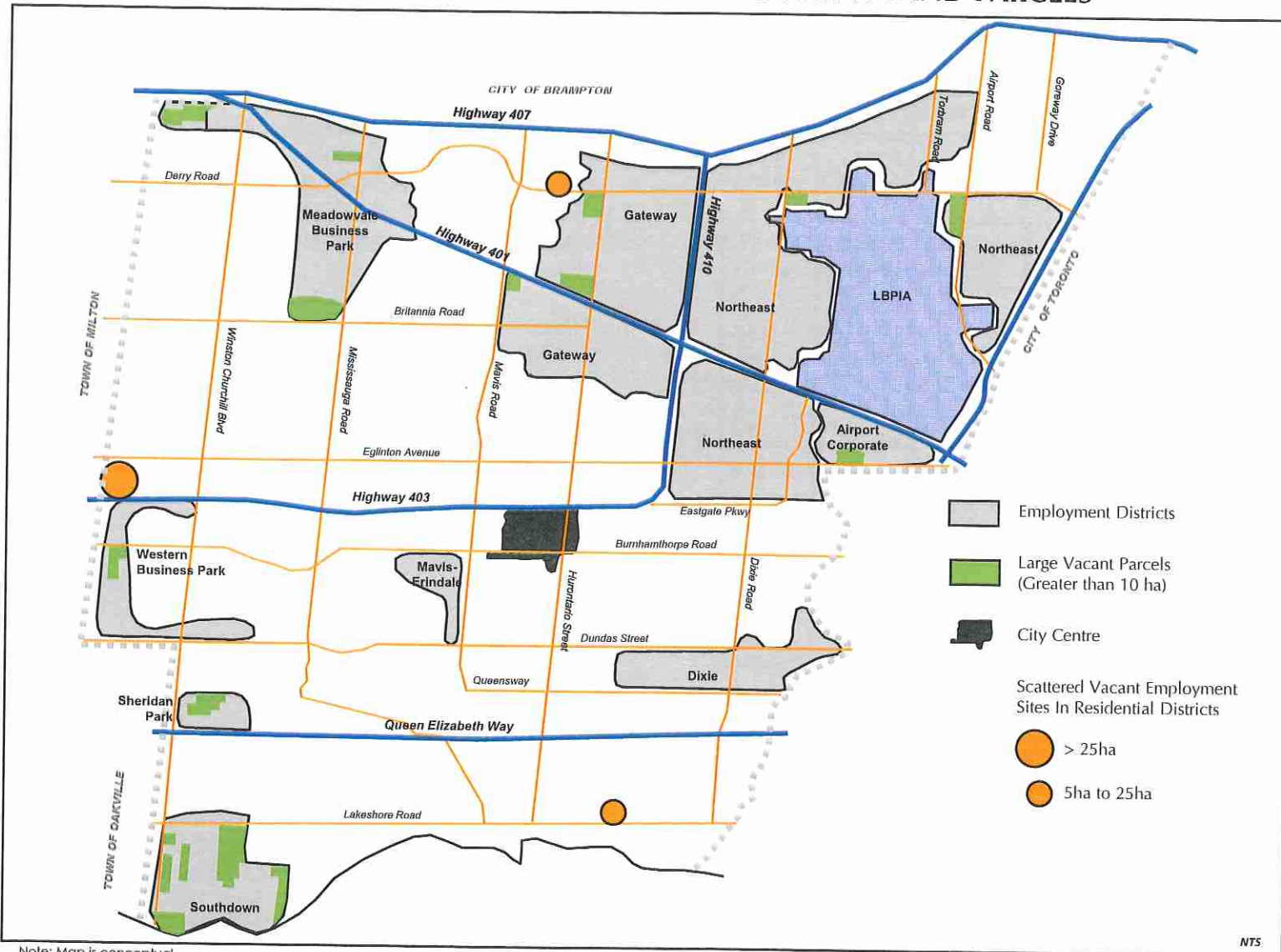
Despite an apparently large amount of vacant employment land — almost 1,000 net ha — only a small portion is considered readily available for development. These are the large greenfield parcels focussed in the Gateway Employment District, the Meadowvale Business Park and the Southdown Employment District.

As shown in Table 2, most of the City's vacant employment land supply is in the form of smaller parcels which are likely to remain vacant over the long-term, consistent with the experience of most other communities.¹

The location of the major parcels are shown on Map 2 on the following page.

¹ These sites remain vacant for a variety of reasons. They may be being held for expansion purposes, or constrained for other physical reasons such as site configuration, access, contamination or reasons related to the landowners' business decisions. Within this supply (excluding large greenfield parcels), some of these vacant parcels are also often used for temporary functions such as overflow parking or non-permanent storage. These may be low-intensity uses but are still important for the businesses using the land.

MAP 2: CITY OF MISSISSAUGA LARGE VACANT EMPLOYMENT LAND PARCELS



Note: Map is conceptual.
 Source: Hemson Consulting Ltd. based on the City of Mississauga 2007 Vacant Employment Lands

| Table 2 | |
|---|------------|
| Summary: City of Mississauga Employment District Land Supply, 2008 | |
| Component of Estimate | Net ha |
| Occupied | 5,510 |
| Net Vacant | <u>970</u> |
| Total Land Supply | 6,480 |
| Net Vacant Land Supply is made up of large parcels (greater than 10ha): | |
| Airport Corporate | 10 |
| Gateway | 50 |
| Meadowvale Business Park | 120 |
| Northeast | 50 |
| Sheridan Park | 20 |
| Southdown | 130 |
| Western Business Park | 10 |
| Supply outside the designated employment districts | 30 |
| Sub-Total Large Parcels | 410 |
| Vacant Supply in smaller parcels (less than 10ha) | 560 |
| Total Net Vacant Supply (including long-term vacancy) | 970 |
| Share Occupied | 85% |
| Share Large Vacant Sites | 6% |
| Share Other Vacant | 9% |

Source: Hemson Consulting Ltd. 2008, based upon City of Mississauga Employment Land Supply Data.

Note: Totals may not add due to rounding.

4. Land and Building Supply Has High Occupancy

The supply of land and buildings in the City of Mississauga is very well occupied, as reflected in relatively high employment densities and low building vacancy rates in the City's Employment Districts. Significantly lower employment densities and building vacancies are only observed for one of the City's Employment Districts (Southdown) and smaller sites and areas outside of the Employment Districts.

As discussed in the 2005 report, *Understanding Employment Land in the Region of Peel*, the City of Mississauga's overall employment density is estimated to be approximately 38 employees per net ha, excluding land occupied by free-standing offices and land occupied by population-related employment uses such as commercial and institutional facilities.¹

As shown in Table 3, employment land employment density—excluding offices and major retail and institutional concentrations—ranges from a low of 11 jobs per net ha in the Southdown Employment District to a high of 51 jobs per net ha in the Western Business Park.

¹ The City of Mississauga includes these uses in the measurement of employment land density, resulting in a City-wide estimate of 44 employees per net ha. For details, see the 2007 Employment Profile report, prepared by the Mississauga Planning and Building Department.

| Employment District | Jobs per net ha |
|--|--------------------|
| Western Business Park | 51 |
| Northeast | 47 |
| Gateway | 43 |
| Dixie | 37 |
| Mavis-Erindale | 35 |
| Meadowvale Business Park | 33 |
| Airport Corporate | 32 |
| Sheridan Park | 21 |
| Southdown | 11 |
| Supply Outside the Designated Employment Districts | 17 |
| Overall Employment Density | 38 |
| Overall employment density, excluding specialized low-density areas | 42 |

Source: Hemson Consulting Ltd. based on City of Mississauga Planning and Building Department data.

The employment land employment density of 38 jobs per net ha may seem low compared to typical industrial-type buildings — a building at 35% lot coverage with 80 m² per employee would be about 44 employees per net ha.

A number of unique uses with very low employment densities, however, tend to reduce the overall average. The industries in the Southdown Employment District and at some other scattered locations, such as oil refineries and cement plants, for example, have a much lower employment density than typical development because they are more land-extensive uses.

Excluding these low-density areas from the calculation results in an employment land density of 42 jobs per net ha. Mississauga's employment density compared to other GTAH communities is shown in Table 4.

| Municipality | Employees per net ha |
|-----------------------|----------------------|
| Town of Richmond Hill | 65 |
| Town of Markham | 60 |
| City of Toronto | 45 |
| City of Burlington | 54 |
| City of Ottawa | 48 |
| City of Brampton | 42 |
| Town of Oakville | 40 |
| City of Mississauga | 38 |
| Town of Caledon | 35 |
| City of Vaughan | 35 |
| Town of Whitby | 30 |

Source: Estimates prepared by Hemson Consulting Ltd. based on a range of data sources including municipal land and employment data and Census employment data.

Note: This measure of Mississauga's employment density includes specialized low-density areas.

As can be seen, the densities range from a high of approximately 30 employees per net ha in the Town of Whitby to a high of between 60 and 65 employees per net ha in the Towns of Markham and Richmond Hill. Markham and Richmond Hill have particularly high employment densities because they accommodate a large number of smaller industrial multiples that contain office-type uses.

The vacancy rates for standing space in both the industrial and office markets indicate that Mississauga and the GTA West market have moderate and competitive vacancy rates, as shown over in Table 5. The relatively low vacancy rates indicate continued market demand for space in the area, but the rates are not so low that there is a significant limitation to the availability of space that would result in upward pressures on rents.

On balance, the City's employment land supply has developed very successfully and continues to display signs of a healthy and growing market, recognising that the long-term supply of new development opportunities is increasingly limited. The supply is nearly fully developed and the vacancy rates of existing industrial and office buildings compare favourably to other markets in the GTAH.

| Table 5 | |
|--|------|
| Industrial and Office Vacancy Rates City of Mississauga, 2007 | |
| Industrial Space | |
| Mississauga | 6.6% |
| GTA West Market Area (Peel & Halton) | 6.4% |
| GTA | 5.5% |
| Competitive Office Space | |
| Mississauga | 8.2% |
| GTA West Market Area (Peel & Halton) | 6.9% |
| GTA | 6.2% |

Source: Cushman and Wakefield LePage, Greater Toronto Industrial Report, Fourth Quarter 2007.

Cushman and Wakefield LePage, Toronto Office Space market, Fourth Quarter 2007. The vacancy rate of the City of Mississauga is from the Second Quarter of 2007.

B. PATTERN OF DEVELOPMENT REFLECTS THE CITY'S INDUSTRIAL HISTORY

The type of activities accommodated on employment land in the City of Mississauga reflects the historic pattern of industrial land development, which began in the south with the establishment of the Dixie area in the 1950s. This was followed by the Sheridan Park Research Centre in 1964 and additional development in the Southdown and Mavis-Erindale Employment Districts.

Beginning in the early 1970s, significant development began to occur in areas around the LBPIA and along Highway 401. These areas tend to be larger and newer, and accommodate development at higher densities than the older areas to the south. The older employment areas of central and south Mississauga are characterized by smaller lots, and a more fine-grained pattern of development.

Like the City of Toronto, the diversity of age and type in Mississauga's employment land and building supply can be an economic advantage. All of the City's Employment Districts play an important economic role, from accommodating major concentrations of economic activity to providing relatively lower-cost space to users who value a central location in the community.

1. Employment Districts Accommodate About 284,000 Jobs

The City's Employment Districts, according to the City's 2007 employment survey accommodate about 284,000 jobs. Of this total about 210,000 jobs would be in industrial-type employment-land employment, about 63,000 jobs would be in major office development and about 11,000 jobs would be in major retail centres. Like land supply, jobs are mostly concentrated in the areas around the LBPIA, as shown in Table 6 below.

| Employment in Employment Districts City of Mississauga | |
|---|----------------|
| Northeast | 117,600 |
| Gateway | 54,000 |
| Meadowvale Business Park | 40,600 |
| Airport Corporate | 23,000 |
| Dixie | 16,800 |
| Western Business Park | 11,700 |
| Mavis-Erindale | 8,600 |
| Southdown | 6,200 |
| Sheridan Park | 5,800 |
| Total | 284,300 |

Source: City of Mississauga Planning and Building Department, 2007 Employment Profile.

Note: Totals may not add due to rounding.

One area of interest that is not included in this analysis is the LBPIA itself. The following points with respect to the airport warrant attention from the perspective of employment land analysis:

- According to the City's 2007 employment survey the Airport site accommodated about 20,000 employees. This is a significant amount of employment for a single use in a community.
- Much of this employment is of a similar character to employment-land employment; examples include air cargo and aircraft maintenance.

- Despite this character, however, LBPIA employment is not included in the Employment District analysis, since it does not have a specific employment land base associated with it, nor are most of the planning policies associated the Employment Districts applicable to the Airport site.
- However, a major issue that is related to development around the Airport site — which does involve the City's Employment Districts — is road congestion and goods movement.

As described in *Understanding Employment Land in the Region of Peel*, prepared for the Regional Municipality of Peel in 2005, actions need to be taken to ensure that the full economic potential of the areas around the LBPIA are realized. In the report, a transportation demand strategy is recommended for consideration because the economic activity around the LBPIA depends on goods movement.

A transportation demand strategy could suggest initiatives to improve the efficiency of the transportation network. These initiatives could include providing transit service to connect employers in airport areas with local communities, promoting car pooling, adding truck-only lanes to area expressways, and identifying possible dedicated expressway links and high speed rail to connect the airport to other urban centres. In addition, restricting business in the area surrounding the airport to higher order uses would promote intensification of employment areas.

2. Employment Districts Accommodate a Wide Range of Economic Sectors

The profile of employment in the Employment Districts indicates a wide range of economic activities. As noted above, about one-quarter of employment in the Districts is made up of major office employment and a smaller amount of employment in retail centres.

- Within the Employment Districts, office uses are concentrated in the Airport Corporate Employment District and the Meadowvale Business Park.
- There are also a small number of large format retail developments, or “power centres” in some of the Employment Districts, including: along Dundas Street in the Western Business Park, at Mavis Road in the Gateway Employment Districts (Heartland Centre) and at the intersection of Winston Churchill Boulevard and Highway 401 in the Meadowvale Business Park (Winston Churchill Centre).
- Retail uses are also located along some of the arterial road frontages of older Employment Districts, including Burnhamthorpe Road West in Mavis-Erindale, Dundas Street in Dixie, and Dixie Road in Northeast.

Notwithstanding real and perceived changes in the GTAH economy, Mississauga's Employment Districts remain very much concentrated in many of the traditional industrial sectors of manufacturing, wholesale trade, and transportation and warehousing. This is summarized in Table 7 below.

| Table 7 | |
|---|---|
| Clusters of Leading Employment Sectors City of Mississauga | |
| Sector | Predominant Locations |
| Wholesale Trade | Airport Corporate, Dixie, Gateway, Mavis-Erindale, Meadowvale Business Park, Northeast, Western Business Park |
| Manufacturing | Dixie, Gateway, Mavis-Erindale, Meadowvale Business Park, Northeast, Sheridan Park, Southdown, Western Business Park |
| Transportation and Warehousing | Airport, Airport Corporate, Dixie, Gateway, Mavis-Erindale, Northeast, Western Business Park, scattered sites in all other employment areas |

Source: City of Mississauga 2007 Employment Profile

In terms of overall employment, these three sectors accommodate nearly half (46%) of the total employment in the City of Mississauga, the vast majority of which is located in the City's Employment Districts and, in the case of transportation, the LBPIA and surrounding areas.

3. Pockets of Employment Land Outside the Districts Are Also Attractive Business Locations

In addition to the Employment Districts, there are also a number of smaller occupied industrial employment areas throughout the community:

- The largest of these pockets of employment uses are in the Clarkson-Lorne Park, Port Credit, Streetsville and Lakeview Districts.
- Most of the pockets of employment land outside of the districts are generally older, traditional developments oriented towards rail transportation along the railway tracks in the these Districts.
- One of the largest of these pockets is located in the Lakeview District on the south side of Lakeshore Road East abutting the former Lakeview Generating Station, and the Lakeview water and wastewater treatment plant sites.

Within these scattered locations there is also a range of economic activities, however, with a somewhat greater concentration of businesses in some of the service industries serving the local population such as indoor and outdoor storage and auto maintenance and repair.

Based on visual observation of these smaller areas, the majority remain attractive locations for businesses, as they have near full land occupancy and low building vacancy.

4. Buildings Reflect the Age and Characteristics of Different Employment Districts

Generally, the older Employment Districts in central and southern Mississauga are characterized by smaller lots, smaller businesses and more of a fine-grained pattern of development with both the land and building supply near full occupancy. While specific data are not available, these areas appear to have a similar vacancy level to the rest of the City. For example:

- The Dixie Employment District is characterized by a pattern of smaller lots and smaller buildings, which are older but occupied at a relatively high density.
- This is consistent with the pattern of development in areas that are of a similar age in the City of Toronto and elsewhere. Typical building and lot sizes within industrial areas have increased significantly over the past 40 years and particularly in the last 15 years, as is notable in the Gateway area.
- Although Dixie is mostly characterized by smaller lots, it does accommodate a number of large users, such as AstraZeneca Canada Inc. The Mavis–Erindale Employment District is similar in character to Dixie, but, on average, accommodates somewhat newer development.

There are two specialised Districts in southern Mississauga, Southdown and Sheridan Park, which are distinct from other parts of the City:

- The Southdown Employment District is based mainly on industrial activities and, as a result, has a pattern of generally large development parcels.
- With an entirely opposite character, the Sheridan Park Employment District is a historic research park, mainly accommodating office and research uses, some dating back to the early days of its development in the 1960s, but also accommodating recent office and research facilities.

Unlike older areas in the south, the newer Employment Districts in the north are characterized by larger industrial box buildings and are oriented primarily towards the major Highways, such as Highway 401, Highway 403, and Highway 427.¹ Among the characteristics of these areas are:

- The Employment Districts around the LBPIA are home to larger buildings and larger employers. Most of the City's businesses with 300 employees or more are accommodated in the Gateway and Northeast Employment Districts and the Meadowvale Business Park.

¹ *The Western Business Park, while located in the southern part of Mississauga is much newer than the other Districts in the south. For the purposes of this discussion, Western has the characteristics of the newer northern districts.*

- Office development is found in a number of Employment Districts in the north, generally along Highway 401, with particular concentrations in the Airport Corporate Employment District (one of the most desirable office nodes in the GTAH), as well as in other locations in the Meadowvale Business Park and the Gateway Employment District.
- The Meadowvale Business Park Employment District accommodates office uses, in addition to a range of large, “big-box” buildings fronting on to major highways and arterial roads, such as Highway 401, Mississauga Road, and Erin Mills Parkway

5. **An Emerging Trend Is for Community Uses to Locate Within Employment Districts**

Overall, the City’s official plan policies for employment land have been implemented very effectively. The predominant land uses within each of the City’s employment areas correspond well to the specific designations that have been applied to each area.

There are, however, some non-industrial uses, notably some older residential development and more recently a pattern of community uses locating within Employment Districts. Not including transit stations, the main types of community uses that tend to locate within the City’s Employment Districts are schools (mainly private), community and recreation centres and other institutional uses such as cultural centres and places of religious assembly. Examples include:

- The Gateway Employment District, which contains numerous non-industrial uses, such as institutional uses, which are located south of Derry Road at Capital Court, North of Brumel Road at Kennedy Road, West of Chedworth Way at Matheson Blvd, and other locations.
- The Mavis–Erindale Employment District, which has existing institutional uses abutting Burnhamthorpe Road, Central Park West, and Wolfdale Road on lands that are designated Business Employment.
- The Meadowvale Business Park, which has institutional uses in areas designated for Business Employment at Queen Street and Alpha Mills Road, North of Kitimat Road at Rinmi Mews, and North of Britannia Road West. The City has received an application for the development of a place of religious assembly at Tenth Line West south of Highway 401, in a location designated for business employment uses.
- The Northeast Employment District contains a number of non-industrial uses, including a school north of Beverley St. at Kennedy Rd., a school south of Eglinton Avenue east, and schools in other locations.

Institutional uses will often seek to locate within employment areas, mainly because of the high price of land within residential neighbourhoods — an unintended consequence of planning to achieve higher densities. In several cases non-industrial institutional uses within designated employment areas are located in close proximity to residential areas.

This trend is expected to continue as the City's urban land supply becomes increasingly constrained for all types of uses and begins to provide more central place functions, including a wider range of community uses to serve a more diverse and older population as well as broader metropolitan-wide economic functions.

The land and building supply in the City of Mississauga is well-occupied, in a manner that reflects the age and character of the areas. Areas closer to central Mississauga developed when goods movement was primarily by rail, and many older buildings in these areas have now been reused for other employment uses. The highway-oriented areas located around the LBPIA are larger, newer and home primarily home to modern industrial uses, including offices.

C. ALL OF THE CITY'S EMPLOYMENT DISTRICTS PLAY AN IMPORTANT ECONOMIC ROLE

Employment land plays a key role in accommodating employment. Across all of the City's employment districts there are major concentrations of economic activity, particularly in traditional industrial sectors such as manufacturing, wholesale trade, and transportation and warehousing. While the built form varies, all employment areas play an important role in the City's economy.

1. Large Northern Employment Districts Are the Major Economic Concentrations

The economic role of the City's northern Employment Districts is to accommodate the bulk of the City and Regional employment base, including traditional economic sectors important to the southern Ontario economy. As shown previously Table 6, the areas around the LBPIA alone account for nearly 200,000 jobs, which is more jobs than are in Toronto's financial core.

The City's northern Employment Districts are home to many of the City's largest employers, including major offices, which is a very intensive employment land use and a rare form of development for most communities.

As shown in Map 3 on the following page, a strong concentration of new offices is focussed in Airport Corporate, and increasingly to the east in the Northeast District abutting the Airport Corporate Employment District.

A similar picture is painted by examining the change in land values. As illustrated in Figure 1 below, the value of industrial land has risen rapidly in the northern Employment Districts, particularly around the Airport and in the Meadowvale Business Park. This strong rise in land values further reflects the market attractiveness of these locations for employment land development, including major offices.

MAP 3: LOCATION OF OFFICE DEVELOPMENT WITHIN MISSISSAUGA OFFICE BUILDINGS 1990 – PRESENT

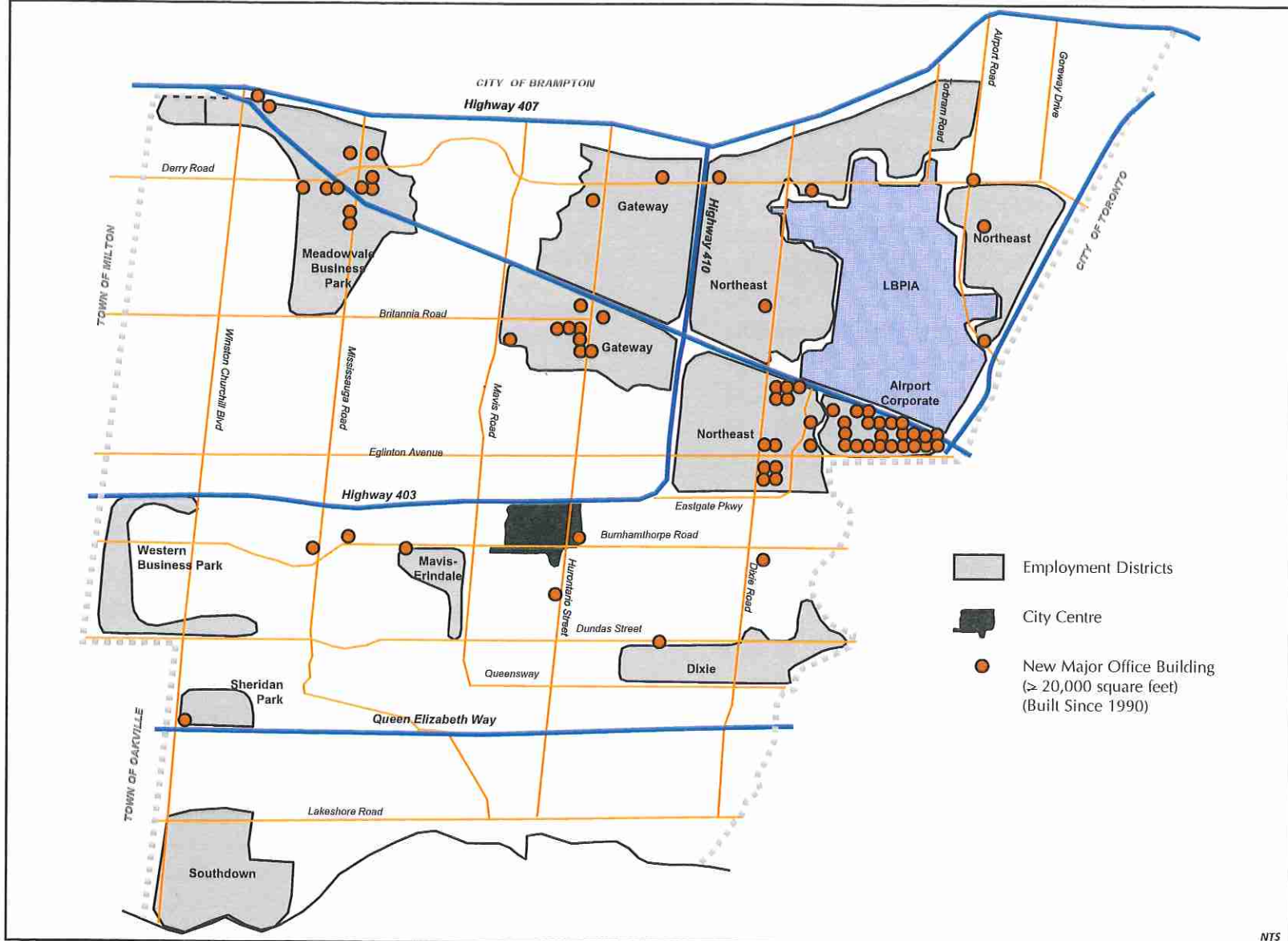
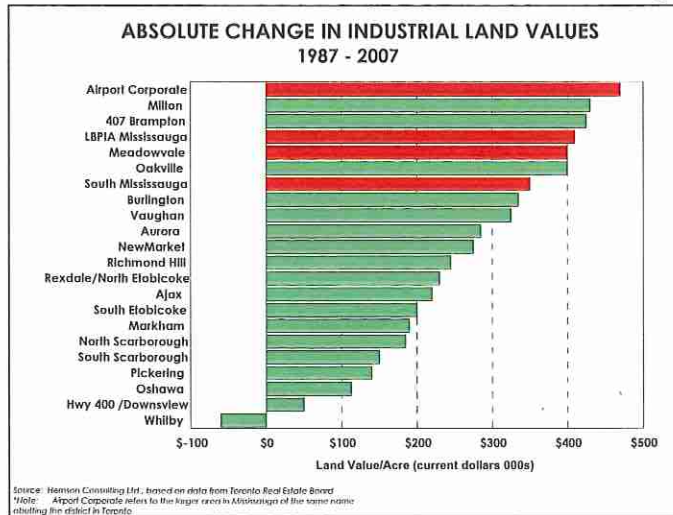


Figure 1



Interestingly, the value of industrial land has also increased in a number of the older Employment Districts in southern Mississauga, indicating that these areas are also attractive locations for new investment.

2. Older Employment Districts Are Also Attractive Business Locations

In addition to the strong performance and attractiveness of the City's northern Employment Districts, the City of Mississauga's older Employment Districts, including Dixie, Mavis-Erindale, and Southdown, also play a key role in economic development:

- They accommodate a number of major employers, and are attractive for a wide range of economic use, including activities servicing the service sector and supporting office development, a role for these older areas which will become increasingly important over time.
- They are also attractive for a range of other commercial activities for which relatively cheaper space is an advantage, or for higher impact uses that are not appropriate for other locations in the City, such as auto-repair or recycling facilities.
- “New economy” uses are increasingly seeking locations within older industrial areas. The “new economy” generally refers to the shift from a manufacturing-based employment to a service and knowledge-based economy. This shift increases the importance of data management and telecommunications infrastructure.
- In the new economy, new industrial facilities still depend on goods movement networks, and are focussed around highways. The buildings can be larger, more automated and often combine storage with other functions such as office, assembly and sometimes manufacturing in a low-profile, large-scale format. These tend to be relatively more benign in their impacts on neighbouring uses compared to industrial uses although they still depend upon truck access. These flex-space facilities are not what was imagined by some analysts who thought that job growth would only favour knowledge-workers in offices and not new kinds of manufacturing and assembly combined with creative work.

- The existing building stock in areas vacated by industry also provides a wide variety of space in different locations, of different size and levels of finish, at prices that cannot be duplicated in new buildings. Start-up firms that need space immediately and firms looking for less capital-intensive space seek out these spaces which increases the mix of uses in employment areas. Many of these uses can also be found in the pockets of industrial areas located outside of the Employment Districts.
- While the shift does not appear to be reducing the overall need for employment land, it is having other effects. One of these effects is the transformation of the city from a suburban community to a mature urban place.
- The attractiveness of these areas for a wide range of uses is reflected in the rise in land values and also through continued interest in reuse of the existing building stock for many economic activities. To this end, an emerging trend in the older Employment Districts is the conversion of multi-unit industrial buildings to condominium ownership, which has the effect of securing long-term certainty in employment land use.

The City's older Employment Districts are a valuable economic asset, since most of these areas have not yet reached the age where rapid business turnover and reduced functionality can be expected.

One of the main challenges for future planning for these areas will be to maintain the quality of infrastructure and the overall design and streetscapes in order to support the competitiveness of these areas.

3. Industrial Character of Southdown Gives the District a More Limited Market Appeal

There is a total of 160 net vacant hectares of employment land in the Southdown District, consisting of a number of larger parcels and some smaller scattered sites. Generally these lands, particularly the larger sites, are best suited and most attractive to industries, given the character of existing development.

At the current City-wide employment density, excluding low density areas, of 42 jobs per net hectare, and assuming 95% development, this vacant supply could accommodate approximately 6,400 jobs. The potential to capitalize on this opportunity, however, is limited by the current land use controls and the pattern of development.

The appearance of existing industrial development acts as a disincentive to a many modern employment land users, particularly light industrial or office uses. There is also a strong potential for land use conflicts as traditional industrial uses tend to have noxious impacts, require outdoor storage of materials, and require outside operations and generate heavy truck traffic. These conditions present a number of significant challenges to making a more efficient use of the vacant employment land supply.

4. Some Large Occupied Properties Outside the Districts May Be Challenging to Develop

Like the Southdown District, some of the large occupied properties scattered outside the designated Employment Districts may also be a challenge to develop.

- These parcels include the larger, older, occupied or under-utilized parcels outside of the designated Employment Districts that may be home to some very long-standing uses that may be nearing the end of their life-cycle, or are standing vacant.
- The supply includes some of the older commercial properties along arterial roads, such as old supermarkets, and some older industrial properties along the lakefront, such as in Port Credit and Lakeview.
- These parcels are likely to be a challenge to redevelop for continued employment land use because of a combination of real estate economics, surrounding land uses and, in some cases, contamination.
- Many of these parcels are also within, or in close proximity to established residential areas, raising the possibility of land use conflicts.

Notwithstanding some of these challenges to developing a broader range of economic uses, overall the City of Mississauga's employment land supply is very well-suited for continued employment use. The supply is large, very competitive, nearly fully-developed and accommodates a wide range of economic activities and built forms. On the whole, it is very well-suited for modern employment use in that all of the City's employment districts have:

- Good transportation access;
- Good access to the LBPIA with a large surrounding concentration of firms, customer base and available labour force; and
- Have already been planned to minimize conflict with nearby residential uses.

Notwithstanding these strong locational advantages, there are a limited number of sites within the currently designated employment land supply where some land use change may be appropriate for site-specific planning reasons. The next chapter turns to a discussion of these areas, and the types of changes that may be considered.

III CHANGES TO THE EMPLOYMENT LAND SUPPLY ARE ONLY APPROPRIATE FOR MARGINAL VACANT SITES AND SOME AREAS WITH SPECIAL CONDITIONS

The appropriateness of permitting changes to the City's employment land supply is considered primarily within the context of the adequacy of the supply to accommodate growth projected by the City and Provincial *Growth Plan* and its competitiveness and suitability for continued employment land use.

Within this context, it is clear that the vast majority of the City's employment land supply should be retained for continued employment land use. Demand for employment will remain strong in the GTAH. Virtually the entire supply is competitive and suitable for continued employment land use. It needs to be retained to achieve City and Provincial *Growth Plan* employment forecasts.

There are some scattered and marginal sites, however, that may be suitable for other use, as well as a number of low-intensity uses along major arterial roads where some change may also be appropriate. This includes marginal vacant sites located *outside* of the designated Employment Districts and some large low-intensity uses located along major arterial roads and the City's waterfront. Refer to Map 2.

A. VAST MAJORITY OF THE EMPLOYMENT LAND SUPPLY SHOULD BE MAINTAINED

As discussed in previous assignments undertaken for the City of Mississauga, demand for employment land in the GGH is anticipated to remain strong. Neither the "new economy" nor the evolution of manufacturing appears to be significantly reducing the need for employment land. Traditional employment areas are still required, including those in Mississauga.

1. Employment Is Forecast to Grow Strongly

The employment outlook in the Provincial *Growth Plan* is for continued strong performance in the GTAH and broader GGH to 2031. The strong employment outlook is based on the continued attractiveness of the southern Ontario economy for new investment and a strategic location relative to markets in the United States.

A significant component of the future employment growth will be accommodated in industrial-type buildings on employment land, consistent with the current built-form demanded by businesses. As shown in Figure 2 below, the GTAH is the most industrialized metropolitan economy in Canada and the United States.

Figure 2

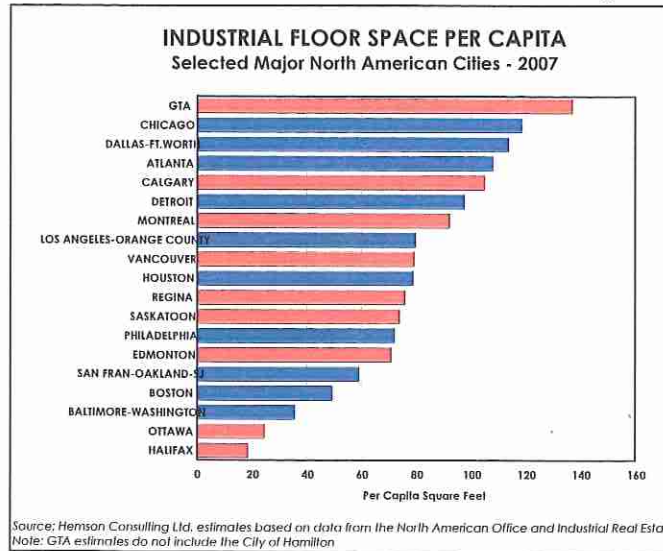
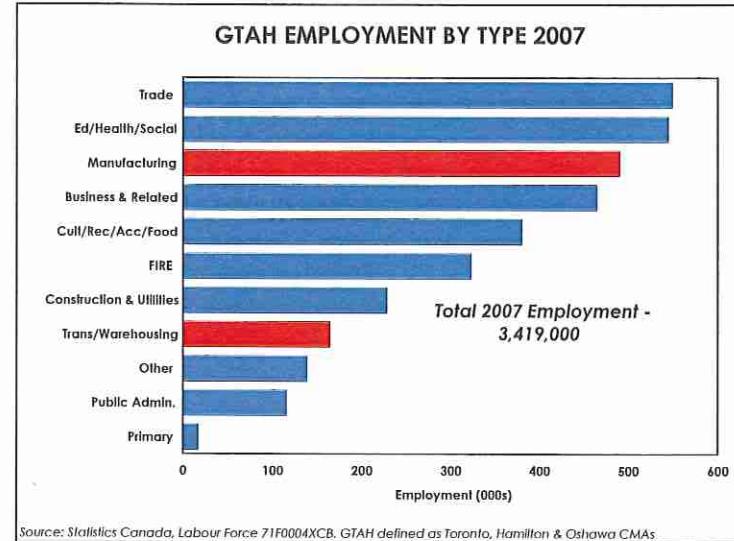


Figure 3



2. Employment Land Is Required to Accommodate Future Growth in Jobs

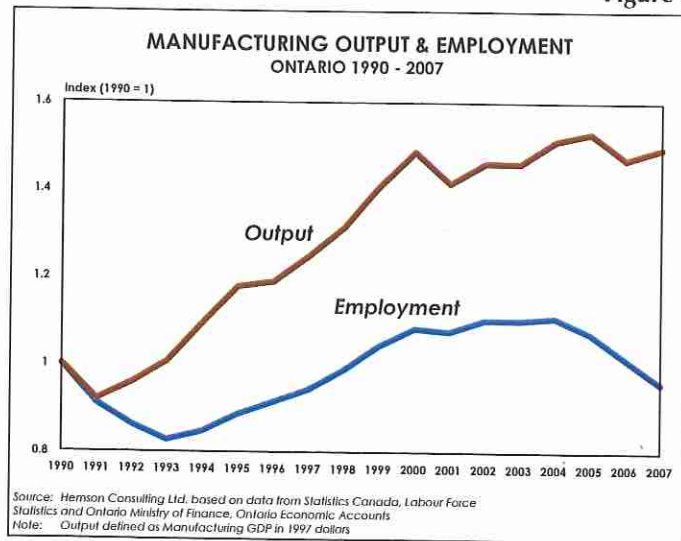
As shown in Figure 3, manufacturing and trade remain two of the largest sectors of employment in the GTA, and these economic activities are overwhelmingly accommodated in industrial-type buildings on employment land.

Although the transportation and distribution sector appears small from an employment perspective, it has significant implications for employment land. Much of the economic activity accommodated in these sectors is in the form of large distribution facilities at fairly low densities. Balancing these, however, are other uses such as manufacturing and offices developed at higher densities.

From the graph, it is interesting to note that — for the first time in decades — manufacturing is not the largest sector of employment. This is the result of many factors, including changes in the nature of work, increased productivity and likely a range of other changes that are commonly attributed to the rise of the service economy.

Although some changes are occurring in the nature of work for some people, this has not been sufficient to change the overall structure of the GTA and GG economy. As shown in Figure 4, manufacturing output continues to grow at a more rapid rate than manufacturing employment.

Figure 4



In our view, it is not appropriate to conclude from this observation that manufacturing as an economic activity is declining, though there are strong cyclical factors at play in 2007 and 2008. As a result, there is no indication that the need for employment land is declining:

- The GTAH is still an industrial-based economy, with significant components of the economic base accommodated on employment land.
- When the output of manufacturing is taken into consideration, it appears as if the GTAH economy is still oriented towards manufacturing, contrary to rumours of the “death” of manufacturing due to economic shifts; and

- If anything, new generation facilities which combine storage with other functions such as office, assembly and manufacturing, may increase demand for industrial-type buildings in employment areas.

Employment land continues to play a major role in the competitiveness of the GTAH and the broader GGH, and needs to be retained to accommodate the employment outlook in the *Provincial Growth Plan*.

Although the Region of Peel has yet to allocate the *Growth Plan* forecasts, the anticipation is that most of the supply will be retained as employment land, including the occupied supply in older industrial areas. These older industrial areas, particularly in southern Peel Region, play a key role in economic development through the use and reuse of existing industrial buildings.

Our experience from the City of Toronto indicates that many service economy uses, such as printing companies, caterers and other support services such as secure file destruction and storage, are accommodated in older buildings in older employment areas. This is different than the common perception of the service economy as being primarily accommodated in large office buildings.¹

As a result, the City of Mississauga needs to retain the vast majority of its Employment District land supply in order to accommodate projected growth:

¹ For detail see *City of Toronto Employment Land Strategy (Phase 2 Report)* prepared by Hemson Consulting Ltd, in January 2007.

- The occupied supply must be protected to maintain the existing economic base and ensure that existing users remain satisfied. This focus should support business retention and protect opportunities for employment intensification.
- The vacant supply must be protected in newer areas to accommodate investment opportunities in modern industrial uses and in older areas to provide opportunities for uses that value a central location and access to large labour force; and
- Although some of the vacant supply may remain vacant in the long term (referred to as “long-term vacancy”) these sites are not appropriate for conversion because of the potential for destabilisation in the vicinity.

3. Limited Change, However, May Be Appropriate to Achieve Other Planning Objectives

This is not to say, however, that no change for employment land should ever be considered or permitted. There will clearly be some cases where a conversion of employment land is considered to be good planning based on site-specific reasons. A number of key points warrant attention in this regard:

- The Regional forecast in the *Growth Plan* accounts for Mississauga’s shift to a maturing community and the continued evolution of older employment areas, including wider range of use or limited conversions to non-employment uses.¹
- Some change may allow the City to make more efficient use of the employment land supply by permitting a wider range of economic use in certain areas. These uses may include business employment and institutional uses supporting the City’s vision for mixed-uses and allowing the City to achieve other planning objectives, such as redevelopment and employment intensification. It would also help ensure that non-employment uses, including educational and cultural facilities, can be developed.
- Change to permit a wider range of economic use is supported as opposed to residential redevelopment, which has potential to destabilise areas and therefore is not consistent with City and Provincial objectives.

While conversions to residential use are almost always very desirable from a private market perspective, from a public policy perspective they are detrimental to other community-wide planning objectives, such as the City’s continued strong employment and economic growth.

¹ For detail on the method for employment forecasting used to create the employment allocations in the *Growth Plan*, see *Hemson’s 2005 Growth Outlook for the Greater Golden Horseshoe*.

Any proposals for conversion of employment lands to residential use should require a comprehensive study undertaken on an area-wide basis. Otherwise, the potential for severe land use conflicts with long-term industrial operations and quality of life impacts for new residents risk destabilising area employment land. Residential infilling on an ad hoc basis (even along edges or peripheries of employment districts) could also undermine the stability of employment land, or where conversion may be desired over the long term, may introduce built form and use patterns that prevent good quality urban place-making.

Conversion of employment land to more mixed uses requires substantial public investment to upgrade streetscapes and community facilities to serve new residents. The City should ensure that the policy framework for conversions directs the use of Section 37 of the Planning Act, the aggressive implementation of urban design guidelines, and other methods to ensure that a high quality urban environment is produced.

A limited amount of change would also not affect the City's ability to achieve *Growth Plan* forecasts. The employment forecast accounts for the evolution of the industrial supply, including some limited changes to other uses. Significant change, however, is not desirable.

4. Major Redevelopment Opportunity Is for Larger Parcels Outside the Employment Districts

For the most part, the large designated Employment Districts should be maintained as currently planned, given the important role the occupied and vacant land supply will play in their future economic development and the risk of destabilisation through conversion.

While some marginal or "edge" sites may be appropriate for a wider range of use, from a planning perspective the vast majority of the employment land supply should be maintained. The major redevelopment opportunities for employment land are with the scattered vacant or under-utilized sites outside the districts:

- Within the City of Mississauga, there are a number of larger industrial parcels located outside of the designated Employment Districts in residential planning districts, including many older industrial areas along the waterfront.
- There is the potential for carefully managed change of these parcels assuming that they could be planned comprehensively and buffered from surrounding areas. Other parcels, however, may be suitable for continued employment use given their market prospects.
- The primary opportunity within this class of sites are the parcels of larger, former industrial operations for which the prospects of redevelopment for continued industrial use are very low.

- These types of sites present no particular economic advantage to the City and will likely be a challenge to develop. Where environmental contamination is an issue, only higher value land uses may be possible, such as residential or retail uses, where appropriate within the surrounding land-use context. Examples of sites where soil contamination may be an issue include the former Imperial Oil lands in Port Credit and the Inglis site in Lakeview.
- In the interest of making more efficient use of the existing land supply and achieving other City and Provincial policy objectives for more intensive forms of development, these sites may be considered for other types of uses.

While the vast majority of the City's employment land supply should be retained, there are some cases where change may be appropriate to achieve other planning objectives. Accordingly, the following sections set out our conclusions and recommendations on where, and what type of changes should be considered for the City's employment land supply.

Incorporated into our conclusions is input received during two Employment Lands Workshops held with City and Region of Peel staff and two meetings held with the project steering and working committee as well as Region of Peel staff.

Based on the foregoing review of the employment land supply, City and Provincial planning objectives and input from the workshops and meetings with City staff, the key recommendations are as follows.¹

B. MINOR CHANGES ARE RECOMMENDED IN THE NORTHERN EMPLOYMENT DISTRICTS

Generally, no significant change should be considered for the northern Employment Districts, which include the Gateway, Northeast and Airport Corporate Employment Districts and the Meadowvale Business Park. These areas contain major economic concentrations and are healthy and competitive for continued employment land use. Two minor changes, however, are recommended.

¹ The first workshop was held on November 27th, 2007 and the second on December 4th, 2007. Each of the workshops was a full-day event, comprised of morning field work by way of a bus tour to visually examine each of the areas, followed by an Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis in the afternoon. The SWOT analysis provided input for the analysis contained in this report, however the recommendations contained in this report are based on Hemson's experience in employment land planning in Mississauga and other communities in Southern Ontario.

1. A Small Boundary Change May Be Appropriate for Airport Corporate

A small boundary change is being recommended for the Airport Corporate Employment District to expand the market opportunities to accommodate major office development in this location:

- A significant number of prestige industrial sites and major office buildings have been developed on the eastern boundary of the Northeast Employment District on lands abutting the Airport Corporate Employment District. The market for this type of office development is attracted to this location because of the transportation access with Highways 401, 400 and 427 nearby, the clustering of other major offices, as well as a tributary of the Etobicoke Creek providing a measure of natural amenity.
- While the supply of land to accommodate major office development in the City is nearly unlimited, there is a more limited supply of lands in the City suited for the campus-style of office development occurring in this area. Therefore, there may be advantages to expanding the boundaries of Airport Corporate from a land supply marketing perspective.
- Expanding the boundary of the Airport Corporate Employment District may also help support Bus Rapid Transit (BRT) in the area to the extent that it may promote higher employment densities through additional major office development.

- From a planning perspective, expansion beyond that is not recommended, as this would begin to include some of the more standard industrial users who are more appropriately associated with the bulk of like uses in the Northeast Employment District.
- Since the planning objective for the Airport Corporate Employment District is to accommodate mainly prestige and office-type uses, extending the area too far may generate a number of non-conforming uses and may restrict future flexibility to accommodate more general industrial development.
- The SWOT analysis undertaken as part of this exercise confirmed that, for the most part, the City's northern Employment Districts were high-performing, high demand and appropriate locations for continued employment land use.

2. A Broader Range of Use May Be Appropriate on One Parcel in the Meadowvale Business Park

The parcel located west of Winston Churchill Boulevard and south of Highway 401, in the southeast quadrant of the Highway 401 – Highway 407 interchange may be appropriate for a broader range of use:

- The parcel in question is considered to be distinct from the main area of the Business Park by the nature of both its location and recent development patterns.

- Located on the west side of Winston Churchill Boulevard, the parcel is relatively isolated and recently has been developed for major retail. A new GO Transit station has also been recently constructed southwest of the retail development.
- Although it is located at a major highway intersection, access to the site is far from ideal: the area suffers from a lack of local road access, which presents at least a short-term constraint to development.
- The combination of stand-alone large-format retail uses, poor local road access and the presence of higher-order transit has led to suggestions that a wider range of uses may be appropriate in this location. The potential for change must be considered from both an economic development and land use planning perspective.
- From an economic development perspective, the parcel should be retained as employment land. The Meadowvale Business Park is one of the most successful employment areas in the GTA, and one of Mississauga's premier locations for office and prestige industrial development.
- While the parcel may suffer from short-term access constraints, these could be addressed. The parcel in question also contains a number of the few remaining large greenfield employment land sites in the City, and is therefore considered to be an asset for accommodating new investment.

From a site-specific and use planning perspective, however, and given the presence of a higher-order transit facility it may be appropriate to consider allowing for a more intense pattern of mixed-use.

At minimum, the site constraints, location and improved transit access suggest a broader range of employment uses are appropriate, potentially including offices, business commercial and institutional uses. The most appropriate change in our view would be to develop a mixed employment district geared to the transit station with a more intense pattern of employment uses, including additional institutional and community uses.

3. A Small Parcel in the Streetsville District and the Area Abutting It in the Meadowvale Business Park May Be Suitable for Change

The second area where a broader range of use may be appropriate is in a small parcel in the Streetsville Planning District and the area abutting it in the Meadowvale Business Park where the pattern of larger industrial land uses shifts to a smaller scale of local retail and commercial service uses found along the Mississauga Road corridor in the Streetsville Planning District:

- During the SWOT analysis undertaken for this exercise, this area was identified by City of Mississauga staff as a zone of limited activity between the Streetsville node and the south end of Meadowvale, containing a number of sites with awkward configurations.

- The area also accommodates some municipal uses such as works yards and vehicle storage facilities, along with other larger commercial and institutional uses.
- A wider range of economic use may be appropriate for the east side of Mississauga Road, recognizing that this area is firmly entrenched in employment use and acts as a buffer to nearby residential.
- A wider range of use may also may be appropriate at the intersection of Britannia Road West and Mississauga Road to improve the linkage between the Streetsville and Meadowvale areas.
- Through the SWOT analysis, it was noted that there may be an opportunity to encourage a concentration of institutional uses in this location, recognizing the broader trend for these types of uses to demand space in or near employment districts.
- The suggested changes were for the potential development of an “institutional campus”, and permission for residential development up to Matlock Avenue on the east side of Mississauga Road.

For both of these areas, further analysis is required through a comprehensive, area-wide study to identify the specific pattern of use that is most appropriate to take advantage of opportunities for transit-oriented development while protecting the economic advantages of such well-located and competitive employment land sites.

C. CHANGE MAY BE APPROPRIATE FOR SOME OLDER ARTERIAL FRONTAGE LANDS

Like the northern Employment Districts, the City’s older Employment Districts should also be largely retained as employment land. The City’s older Employment Districts remain important business locations, both for accommodating long-standing major employers as well as the range of service-type activities that value a lower-cost, central-city location, such as business start-ups and informal business incubators.

As a result, no change is recommended for the interior portions of any of the City’s Employment Districts. Change, however, may be appropriate for some of the arterial frontage lands in the older areas, particularly in locations that are planned for higher order transit or have strong potential for redevelopment.

Planned higher-order transit facilities, combined with the pattern of development along the major arterial frontages in the Mavis–Erindale and Dixie Employment Districts provide a major opportunity for mixed-use corridor development to support the City Centre, and other transit-oriented development goals that are identified as desirable in both City and Provincial policies.

1. Planned Higher-Order Transit May Be an Important Change for Older Employment Districts

One of the more common arguments used to support the conversion of employment land is that it would support transit use. However, experience from the City of Toronto indicates that transit actually works best where it serves concentrations of employment. This includes central Toronto and the major transit nodes located along Yonge Street between Downtown and Steeles Avenue.

In partnership with the Province, the City of Mississauga is planning to undertake a number of transit improvements, including planned higher-order transit along some of the major arterial roads. A combination of both a wider range of economic use, including Business Employment and Institutional uses and changes to other use may be considered for its transportation corridors. It should be noted that contrary to popular perception in planning, employment land uses can be amenable to transit-oriented development.¹

¹ Experience in the GTAH suggests that transit actually works best where destinations include concentrated employment opportunities. This is contrary to the popular planning perception that the success of transit depends mainly on the density of residential development. Within employment lands, some of the employment uses that are amenable to transit oriented development include office development and business employment. In addition, low-density industrial land uses, including manufacturing and warehousing can support transit-oriented development depending on the relative location of and access to the station.

Presently, the existing and planned transit corridors are Burnhamthorpe Road in Mavis-Erindale and Dundas East in Dixie. The primarily low-intensity *commercial* character of these locations speaks to the potential for more intense employment uses or, as appropriate, mixed-use development.

2. Burnhamthorpe Road May Provide an Opportunity for a Mixed-Use Gateway to the City Centre

During the SWOT analysis undertaken for this exercise, the north and east edges of the Mavis-Erindale District were identified as having potential to accommodate a wider range of uses, which may include a greater emphasis on commercial and mixed uses. In particular, there is a strong potential for redevelopment along the arterial frontage of Burnhamthorpe Road because of the area's proximity to the Erindale GO station, the existing office development at Central Parkway West and relatively good local transit service.

- The main opportunity that was identified by staff was for a mixed-use gateway along Burnhamthorpe Road to City Centre, which ends west of Erindale, to provide additional commercial services for the local population and to fill in and improve the streetscape with more pedestrian-oriented uses.
- It was agreed by the participants in the SWOT analysis and workshops that the existing conversions to commercial uses along these frontage lands has not seemed to impair functioning of internal industrial users, which remain strong.

- To permit residential uses along the frontage of Burnhamthorpe Road West, however, would require a commitment to the overall mixed-use character of the area. Proposals for developments including a residential component could be considered if the project is of sufficient size to be planned comprehensively in the context of an area-wide study. Buffering of employment uses to the south, possibly with a backlot road and other mitigation measures, is a priority. Creating a comfortable and lively pedestrian-oriented streetscape would be part of the comprehensive planning approach.

3. Mavis Road May Provide Opportunities for a Wider Range of Use

The opportunities for redevelopment along Mavis Road were viewed as somewhat more limited because of the presence of a number of stable and entrenched industrial uses. These are scrap yards and industrial uses serving municipal functions that play an important economic role and have few relocation options.

Notwithstanding these limitations, both frontages of Mavis Road were identified as areas that should be examined to accommodate a wider range of use. The area has good access and connection to Highway 403. The general appearance of the area could be improved, however, by encouraging some of the low-intensity employment uses in the area to adopt better design standards.

4. Dundas Street East Provides an Opportunity to Develop a Mixed-Use Corridor

Like Burnhamthorpe Road, the Dundas Street East frontage within the Dixie Employment District was also identified through the SWOT analysis as having potential for redevelopment. Much of the redevelopment potential and opportunities along Dundas Street East are the same as those along Burnhamthorpe Road, including:

- Most of the existing development along Dundas Street is in retail and service uses and has not been industrial in character for a very long time.
- Good accessibility to transit, roads and highways and a pattern of strong internal employment land use.
- Planned transit improvements, including a possible Higher Order Transit and other initiatives intended to create the potential for “nodes” at key locations such as Cawthra or Dixie Roads;
- The presence of a number of larger development parcels which are unlikely to redevelop for modern industrial uses given their location in close proximity to established residential communities to the north; and
- The potential for linkages to employers and residential communities along the Dundas East Corridor to the City of Toronto, including the large employers within the South Etobicoke Employment District and residential neighbourhoods to the north.

Residential uses should not be considered in the Dixie Employment District. The most appropriate change in our view would be to promote a more intense pattern of employment use on the south side of Dundas Street. Other non-employment uses may be considered for sites within the Dundas corridor, but outside of the Dixie Employment District. Like the frontage of Burnhamthorpe Road West, such proposals should be subject to a set of conditions including appropriate size, comprehensive planning and buffering for sensitive land uses.

Based upon the pattern of development and planned higher order transit initiatives, the potential for redevelopment along the arterial frontages in both the Mavis-Erindale and Dixie Employment Districts has been identified.

Carefully managed change in these locations may be appropriate to advance both City and Provincial planning objectives for a more efficient use of the urban land supply and for the development of transit-oriented use. Further analysis, however, will be required to identify the uses that will be most supportive of the planned transit investment, how this relates to the current pattern of land use and options for promoting a wider range of use.

As discussed in the following section, change may also be appropriate for a number of scattered, marginal sites outside of the designated Employment Districts.

D. CHANGE MAY BE APPROPRIATE FOR MARGINAL SCATTERED SITES

The scattered sites located outside of the designated Employment Districts consist of two broad categories: vacant parcels designated for either *Business Employment* or *Industrial* in the City's Residential Districts, and the larger, occupied parcels that are developed with a low-intensity use or are currently vacant. This latter category tends to be concentrated in the older areas of the City, particularly along the waterfront, and older arterial frontages.

1. No Change Should Be Considered for Scattered Vacant Sites in the Employment Districts

Within the City of Mississauga's employment land supply are a number of parcels that are likely to remain vacant over the long-term, as a result of physical or other constraints to development. This is referred to as long-term vacancy for employment land planning.

Some planners have suggested that such sites in long-term vacancy should be allowed to convert to other uses, because their development prospects as employment land are limited and such changes would serve broader planning goals such as intensification:

- While this may be true, it does not mean that this would be good planning from the broader community's perspective. Permitting non-employment uses on these sites is not appropriate because of the potential for land use conflicts and area destabilisation, which would be contrary to City and Provincial policies.
- Permitting the conversion of such sites would have the effect of lowering the perceived risk of failure in seeking conversion of other parcels in the vicinity, which in turn would increase the land value expectations of nearby land owners.
- Long-term vacant sites should be largely retained as employment land for all areas, including the older Employment Districts in central and southern Mississauga.

Where already noted in Dixie and Mavis-Erindale, carefully managed change may be appropriate based on analysis through a comprehensive, area-wide analysis of the long-term vacant sites along major arterial frontages in some designated Districts.

2. Vacant Sites Outside Designated Employment Districts May Be Suitable for Other Uses

The vacant sites outside of the designated Employment Districts are defined as scattered vacant sites outside of the designated Employment Districts in the City's Residential Districts. The lands in Churchill Meadows, while technically in this category, are vacant greenfield lands of some scale and should be retained as part of the remaining greenfield supply in the City in accordance with the still-relatively-new Secondary Plan. For the other scattered sites, we would make the following observations:

- These are the vacant sites that are "remnant" or otherwise may be constrained and unlikely to develop as employment land for physical planning reasons such as site size, configuration or access.
- Conversion of some of these sites would make more efficient use of the urban land supply and therefore help to achieve related City and Provincial planning goals, such as intensification.
- Others may be suitable for retention as employment land based on local land use conditions. In particular, sites that may be very large and in close proximity to existing designated Employment Districts may be suitable for employment land if properly planned. For example the small industrial area directly south of Sheridan Park in Clarkson-Lorne Park, should be retained as employment land because the uses are healthy and fully occupied.

- Similarly, some of these scattered sites may face constraints in development for non-employment uses due to other factors, such as their location within the Airport noise influence area. These sites should not be converted to other sensitive uses.

In most cases, change in uses among the scattered sites can be responsive to redevelopment applications. Sites that are appropriate for conversion are those where there are compelling local land use planning objectives which outweigh the property's desirability as a continued location for employment.

3. **New Uses May Be Appropriate for Some Larger Industrial Properties Outside the Districts**

Consideration of new uses through comprehensive, area-wide studies may be appropriate for some of the larger industrial properties that are unlikely to redevelop for modern industrial use:

- The larger industrial sites that may no longer be suited to industrial use are the areas along the Lakeshore in the Port Credit and Lakeview Planning District. They may be suitable for a broader mix of use because of their limited feasibility and competitiveness for continued industrial use and the presence of Lake Ontario as a natural amenity.
- Significant investments in parks and open space along the waterfront combined with the presence of several large under-utilized parcels suggest a potential for comprehensive redevelopment.

- To this end, the Port Credit and Lakeview District visioning exercise will provide key input to the types and location of change that are appropriate.
- The major exception is the substantial employment area on the south side of Lakeshore Road East in Lakeview, abutting the Lakeview generating station site. It is different from other larger vacant sites because this area is nearly fully occupied and appears to be a small, but healthy employment area. It does, however, abut the large Lakeview generating station site and the future of the generating station site will in many ways dictate the future character of the entire area.
- If a new generating station is approved, the Lakeview employment area should be retained. If the generating station site is to be redeveloped as a mixed-use or residential area, the approach to employment land would have to be revisited. Even with large-scale redevelopment of the generating site, employment uses should be privileged but with a broad range of business commercial and other use.

E. **SOUTHDOWN SHOULD BE RETAINED FOR INDUSTRIAL USE**

Southdown is an industrial district with businesses operating with outdoor processing and storage. These businesses are large land users with outdoor operations and storage generating noise, vibration, dust and truck traffic. This area plays a significant role in the City's economic base, and these industrial-type activities are important to the economy of southern Ontario generally.

The viability of this area must be supported but on the edges of the District a broader range of employment uses may be considered to support the City's investment in park redevelopment, including Lakeside Park and Park 389.

While industrial designations internal to the District should maintain the supply of industrial lands over the long-term, the corridors along the edges of the District could support a broader range of some types of business employment uses to create a more comfortable pedestrian experience and link the City's neighbourhoods to the lake. Public and private investment along the corridors should result in an improved streetscape by creating a street wall to buffer users from industrial operations. Recognition that heavy truck traffic will have to be accommodated and that this area is to remain industrial in character over the long-term may require a creative approach to revitalization.

The recommendation is for the Southdown District to be retained primarily for continued industrial use. Given that many other communities in the GTAH are actively discouraging industrial activity, the supply of vacant land in the Southdown District is considered a unique competitive advantage.

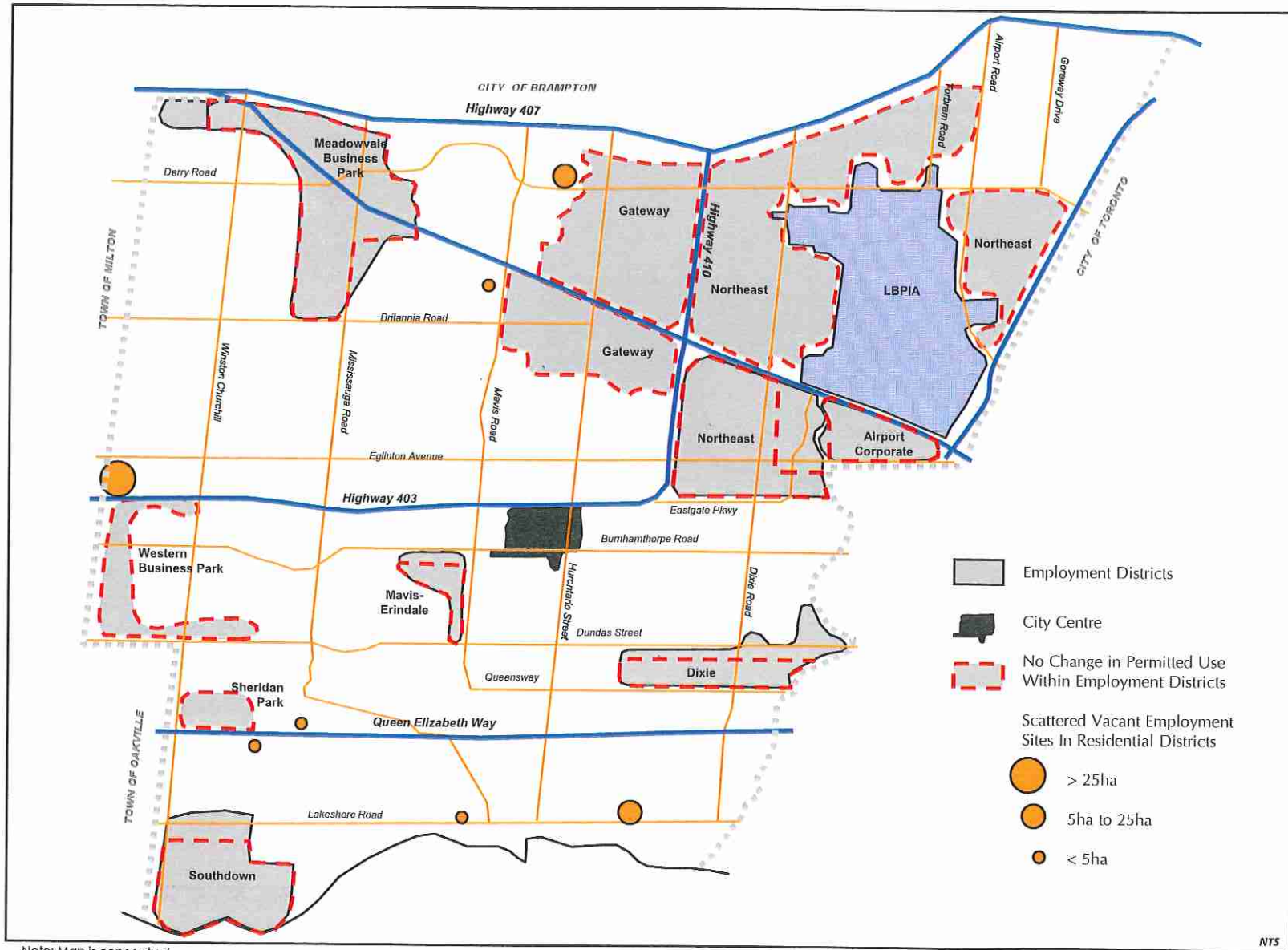
Consistent with City and Provincial policy directions for employment land, most of the City's employment land should remain in its current use, with only a limited number of site specific changes recommended to achieve other planning objectives in the community.

A small number of minor boundary and permitted use changes are recommended for the major Employment Districts in the north, and the only major change recommended for some of the City's older Employment Districts is on key arterial frontage lands which provide an opportunity to create key mixed-use gateway features or corridors.

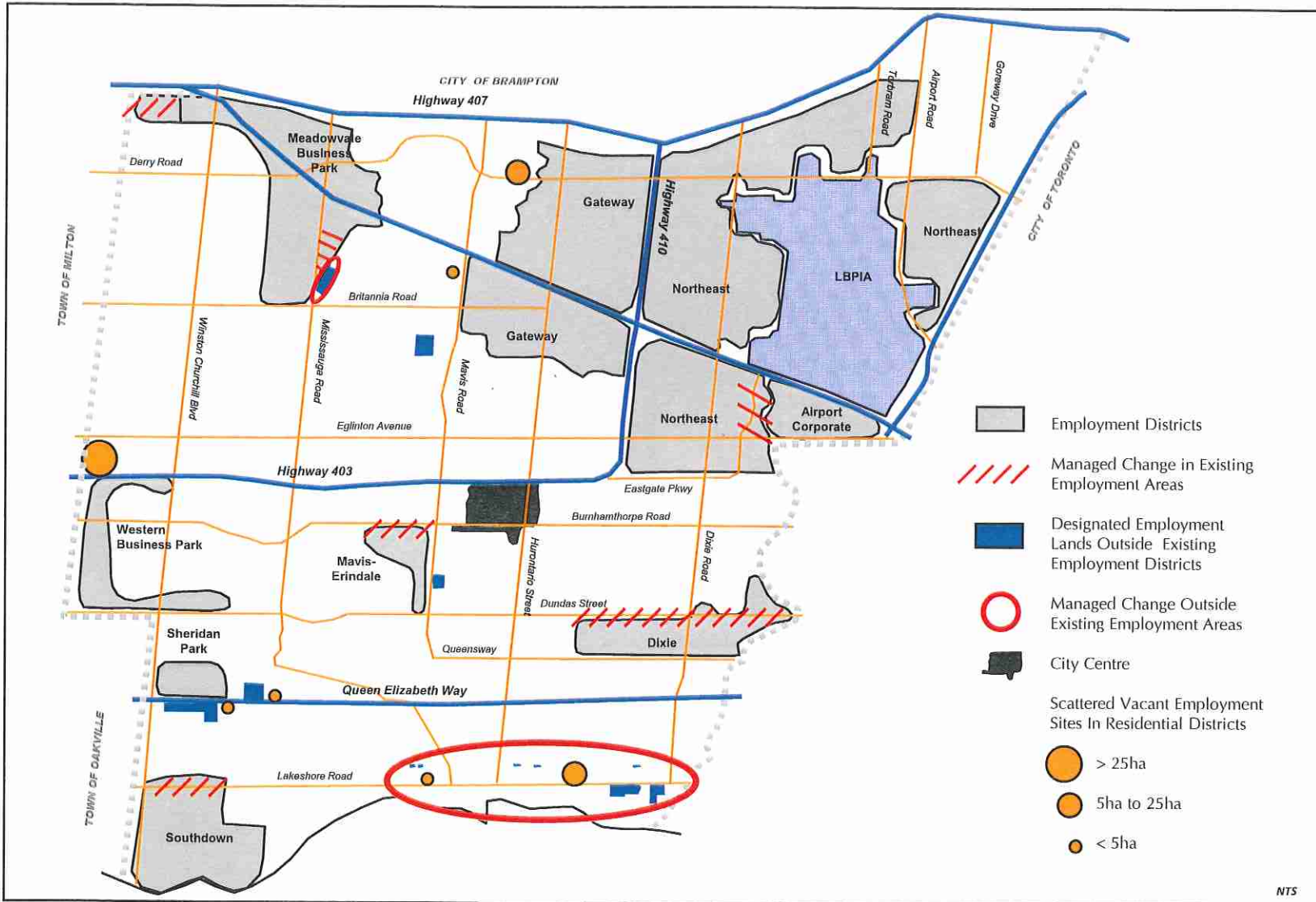
Although there may be potential to allow a wider range of use in Southdown, the potential to disrupt existing users leads us to the conclusion that the area should be maintained primarily in industrial use. The area can be revisited at the time of the next five-year review as land use patterns or other conditions may change.

The areas which have been identified as appropriate for change in this chapter are identified in the following pages shown as Map 4 and Map 5. Map 4 shows the areas where no change in use recommended. Map 5 shows the areas where some change may be appropriate. Following the two maps, in the final chapter we turn to a discussion of the policy directions that are required to implement these recommendations.

MAP 4: AREAS WHERE NO CHANGE IN USE IS RECOMMENDED



MAP 5: AREAS & TYPE OF CHANGE APPROPRIATE IN MISSISSAUGA'S EMPLOYMENT DISTRICTS



Note: Map is conceptual.
 Source: Hemson Consulting Ltd. based upon City of Mississauga Official Plan.

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IV THREE MAIN POLICY DIRECTIONS ARE RECOMMENDED

The conclusions of this study are:

- The key conclusion is that the vast majority of the City of Mississauga's employment land supply should be retained as currently planned. The supply is large and competitive and nearly fully developed, with all of the Employment Districts playing a key role in accommodating economic activity.
- Based on this conclusion, change is only recommended for a small portion of the City's northern Employment Districts, including: a boundary adjustment of the Airport Corporate Employment District; a change in use to a parcel in the northwest Meadowvale Business Park; a change in use to a small parcel in the Streetsville District and the area abutting it in the Meadowvale Business Park; and change on some of the older arterial frontage lands in the Dixie and Mavis-Erindale Districts; and for some marginal scattered vacant sites *outside* of the designated Employment Districts.
- Parcels within the designated Employment Districts that may form part of the City's long-term vacancy are not recommended for conversion because of the potential for area destabilisation.
- The Southdown Employment District is an area for which change in land use is very challenging. For this reason, it should continue to play its current role in accommodating industrial use.

In order to implement these recommendations, the following policy directions should be included in the new official plan. These are summarized below and described in more detail in the remainder of the chapter.

1. Strong policies for employment land retention should be developed. In the context of a constrained urban land supply for all types of uses, and a widening value differential between employment and non-employment uses, strong employment land retention policies are required to ensure that City and Provincial economic objectives are implemented;
2. Site-specific policies and employment land designations should be developed for those sites where conversion may be considered appropriate. A set of criteria should be established to guide the transition of these areas to other urban uses over time; and
3. A series of other policy updates should be made to reflect changing development conditions as the City makes the transition to a more mature community and accommodates more central place functions.

A. DEVELOP STRONG POLICIES FOR EMPLOYMENT LAND RETENTION

Notwithstanding that new Provincial policy directions bring a greater emphasis to protecting employment land and minimizing conversions to non-employment uses, the high demand and high value of residential land will continue to provide a strong incentive for private landowners to seek conversions to other uses.

The main factor driving pressure for conversion of employment land will be the nearing build-out of the supply of land for ground-related housing. This pressure will be compounded by the Provincial *Growth Plan* target for all municipalities to accommodate 40% of new units after 2015 within the existing urban area. Mississauga needs to continue to resist pressure to convert employment land — as it has in the past — in order to achieve both the City's and Provincial economic objectives.

1. The Importance of Employment Land Needs to Be Made Clear

A separate section describing the importance of employment land, pressure for conversion and the rationale for retaining the vast majority of the employment land supply is recommended. This could take the form of a refinement of Section 2.3 of the Mississauga official plan and Section 3.3 and 3.4 to reinforce the need to retain, support and improve conditions for businesses in employment lands in the city. This would be consistent with the need for the City to conform to the employment land policies of the *Growth Plan*.

It is important to note that diversity in land and building space is an economic advantage. The City has the capacity to accommodate the new facilities housing mixed warehousing, assembly and office space that are participating in the new economy as well as more traditional industrial uses, the reuse of older industrial buildings, and basically everything in between. This ability to promote economic vitality through a variety of employment land opportunities meets City and Provincial economic objectives.

2. Specific Policies Need to Be Incorporated into the Official Plan

Following this context piece, specific policies regarding employment land retention should be included in the official plan along with policies to address employment land conversion. It should be indicated that conversion is only being considered for a limited number of sites for specific local planning reasons.

The retention policies will be a key implementing tool to ensure that the City and Provincial economic objectives are achieved, within the context of a constrained land supply for all urban uses, and a widening value differential between employment land, and land for residential or major retail development.

The specific policies could include:

- Need for employment land in both new and older areas given that they all play a vital economic role in the overall community.

- Related to the need for employment land, new policy directions are required to clarify the role that major office employment will play in the future of the City, and counter the mistaken proposition that conversions of employment land are appropriate because most future jobs will be in major offices.
- Need to resist conversion pressure in the vicinity of higher order transit, by highlighting the role employment land plays in supporting transit use. Transit-supportive uses are not limited to residential, and transit actually works well where destinations include concentrated employment opportunities; and
- Need to maintain competitiveness of existing occupied areas including a focus on the areas around the Airport and the other large northern employment area, and improve the quality of streetscapes in the older industrial areas to support reuse to a range of both traditional and non-traditional employment activities.

B. DEVELOP SITE SPECIFIC POLICIES AND EMPLOYMENT LAND DESIGNATIONS

In order to implement the recommendation that some carefully managed change may be appropriate, site specific policies and employment land designations will need to be developed for the affected areas.

The first step would be to identify those specific parcels or areas where a change in use over time may be appropriate. Once the sites or areas are identified, the parcels should be removed from the employment land inventory and placed into one of two new designations:

- If the preferred land use is known, then that specific designation may be put in place — residential, commercial, institutional, etc. and the desired proportions of each if mixed-use; and
- If the preferred use is not known, or a range of uses is possible, the parcels or area should be put into a special policy designation with the preferred use to be determined through further analysis.

This approach will give the City the ability to proactively plan for the role of these areas in the long-term urban structure, rather than respond on site-by-site basis to individual applications. The approach would also remove parcels from consideration in next 5-year review.

1. First Step Is to Identify Sites or Areas Where Conversion May Be Appropriate

The area-by-area review in Chapter III has identified the areas where changes in the employment land base may be appropriate. These areas will still need to be clearly defined and mapped. The locations and boundaries may be clear for individual scattered sites.

Other areas, such as the arterial road frontages will need significant additional local analysis to determine the appropriate extent and depth of the properties to be considered. Sites thus identified could then be removed from the employment land inventory and placed in one of two designations.

2. If the Appropriate Use Is Clear, That Designation Should Then Be Applied

If there are situations where it is clear and appropriate as to what an alternative use may be, these changes could be undertaken in the near term. None of the parcels we have discussed are, to our knowledge, yet in this category.

Small scattered sites in the middle of residential areas that have no reasonable prospects for redevelopment could well be converted if requested, but this need not be done in advance as it would unnecessarily create a number of legal non-conforming uses.

However, criteria and a system to consider such changes should be incorporated into the planning regime, such that applications which may occur will not need to wait for the next five-year municipal comprehensive review.

3. If the Appropriate Use Is Not Clear, a Special Policy Designation Should Be Applied

If the preferred land use is not known, the lands could be given some type of special policy designation. The designation would allow for the continuation of existing industrial uses. It would also allow the planning for change and, ultimately the implementation of change without needing to wait for the next five-year municipal comprehensive review.

If there is interest in converting such lands to another land use, a series of criteria would need to be satisfied, including but not limited to:

- City and Provincial land use planning and economic objectives.
- Land use compatibility; and
- Potential effects on current and future planned uses, including industries that are located in close proximity.

The redesignation of these sites or areas will occur as part of the preparation of the City's new official plan policies, land use designations and zoning districts.

Future land uses would be identified as part of the City's official plan review, where there is an opportunity to consider the results of other studies and initiatives underway as part of the review process.

C. UPDATE OTHER CITY-WIDE EMPLOYMENT LAND POLICIES

A number of other updates are recommended in order to reflect the City's transition to a more mature, urban community. Many of these issues were raised through the SWOT analysis and staff workshops. They are discussed in more detail below.

1. Guidelines for Community Uses in Employment Areas Are Required

The location of community uses in employment areas is an established trend in Mississauga and elsewhere and is unlikely to change in the future. Indeed, these uses are often part of sound creative reuse of existing buildings in employment areas.

Some of the areas identified for managed change may be appropriate locations to concentrate new community and institutional facilities. However, based on the discussions in the workshops, new policies are required to direct, restrict, or concentrate institutional uses in ways that minimize disruption and destabilisation to industrial-type users to ensure that the community uses are well-planned in respect to such matters as parking and well-integrated into the surrounding areas.

2. Strategy for the Southdown Employment District Is Required

As discussed elsewhere in this report, the Southdown area is to remain focussed on industrial uses. However, there may be opportunities to allow a wider range of uses on the periphery of the District to support the development of edge corridors that create a comfortable link between the community and the park areas.

Within this context, a wider range of use permission would be acceptable on the arterial road frontages of Southdown where it can be demonstrated that such uses would not interfere with or restrict existing industrial operations or their future on-site expansion. Options for greening the waterfront can be investigated, but must be planned to recognize the operational needs of existing industries.

3. A Range of Specific Policy Matters Should Also Be Considered for the New Official Plan

In addition to the land designation and other policy matters already discussed, there are a number of specific issues related to employment lands that should be considered for inclusion in the City's policy regime:

- Guidelines for converting multi-unit industrial development to industrial condominiums should be considered. Commercial-industrial condominiums are desirable to ensure that employment use locates in an area over the long term, however they also could limit possibilities for the long-term development and redevelopment of lands in employment areas, for instance along arterial road frontages where redevelopment may be encouraged.

- Guidelines for the site positioning of office buildings can provide for longer-term employment intensification potential. Office buildings are often sited in the centre of a property and surrounded by surface parking. Buildings sited to one side or a corner of a site would allow for future additional development with structure parking, should that become an economic development form in the future.
- Clarification of policies respecting daycare facilities have been suggested to assure that daycare can be made available in employment areas, but also to assure that locations are appropriate for this sensitive use.

The City of Mississauga is entering an important transition period where it will move from a rapidly growing urban community to a more mature, urban community where redevelopment and intensification will become more important. A number of issues related to employment land need to be addressed, particularly the need to protect the majority of the supply in the face of what is anticipated to be rising pressure for conversion.

At the same time, however, there will be some limited circumstances where the conversion of employment land may be considered to be good planning, particularly for some of the larger and older scattered sites in southern Mississauga and along some of the City's older arterial frontages. We trust that the initiatives recommended in this report are of assistance to staff and Council as they look forward to the next exciting chapter in the City's history.