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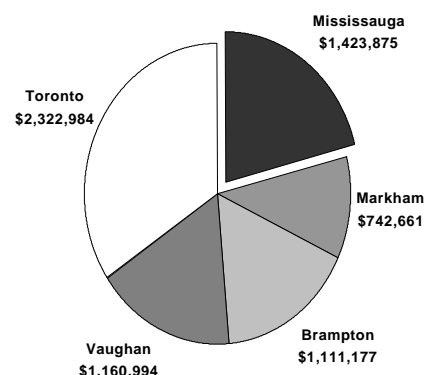
Development Conditions

During 2000, development activity in Mississauga remained strong, although it did not achieve the record value of permits issued in 1999. The total prescribed value of \$1.42 billion in building permits issued in 2000 was 24% below the 1999 value of \$1.88 billion. The value of building permits for 2000, however, represents the fourth consecutive billion-dollar year.

Ontario's economy remained among the strongest in the country and fuelled a healthy housing market. Housing demand has been driven by a buoyant economy, job creation, tax cuts and income growth. Despite the predictions of an economic slowdown, housing forecasts remain strong due to lower interest rates and inflation as well as good affordability and housing choices.

Housing starts in Ontario reached 71,521, up from 67,200 starts in 1999. The Province experienced the highest starts level in eleven years and accounted for just under half of Canada's home starts.

2000 Total Value of Building Permits
Mississauga vs Selected Other Municipalities



According to CMHC, Mississauga's housing starts increased to 5,375 in 2000 from 4,601 starts in 1999, an increase of 17%. In 2000, Mississauga was ranked fourth in terms of new home sales with a total of 4,593 sales of new freehold and condominium units. These units represented 11% of the total sales in the Greater Toronto Area (GTA).



Intria Items Inc., a call centre at 155 Britannia Road East, was one of the largest employers in the City in 2000.

The office market in Mississauga remained strong in 2000 with an increase in leased square footage and new construction. New speculative development that occurred in 1998 and 1999 is slowing down with new development proceeding on the traditional pre-lease basis.

The GTA West industrial market continued its impressive performance with 7 million square feet of absorption and increases in net rental rates. In Mississauga, demand for distribution facilities over 100,000 square feet with clear heights of 24 feet from the manufacturing, warehousing, high tech and distribution sectors are driving the market.

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Building Permits

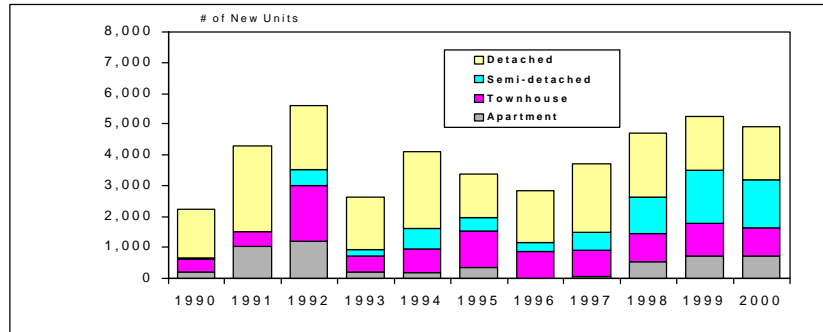
The \$1.42 billion of prescribed construction value for all types of permits issued in 2000 represents a decrease of 24% or \$456 million over the total for 1999.

Although housing starts increased from 1999 to 2000, there was a decrease for all four types of residential units issued building permits during this time period due. Many of the 2000 starts would have had permits issued in 1999. Permits for semi-detached units decreased the greatest with 178 fewer units issued permits. Townhouse units issued permits decreased by 13% while detached units decreased by 3%.

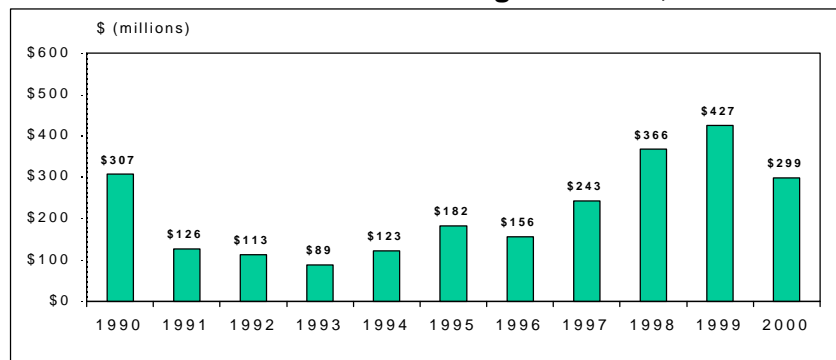
Prescribed construction value for industrial building permits decreased from their benchmark high of \$427 million in 1999 to \$299 in 2000.

Total non-residential building permits for new structures declined 50% from 1999 to 2000 to represent a value of \$384 million.

New Residential Units Based on Building Permits Issued, 1990-2000



Prescribed Construction Value Based on Industrial Building Permits, 1990-2000



Note: Includes industrial building permits for new construction and additions and alterations.

Industrial/Commercial/Institutional Building Permits for New Structures, 2000

| Type | # of Buildings | Application Area (m ²) | Application Area (sq.ft.) | \$ Value |
|-------------------|----------------|------------------------------------|---------------------------|----------------------|
| Office | 4 | 32,383 | 348,570 | \$30,532,000 |
| Retail/Commercial | 44 | 98,259 | 1,057,646 | \$93,686,000 |
| Industrial | 36 | 406,915 | 4,379,997 | \$206,037,000 |
| Institutional | 18 | 37,760 | 406,449 | \$54,178,000 |
| Total | 102 | 575,318 | 6,192,662 | \$384,433,000 |

Note: Does not include industrial building permits for additions and alterations.

2000 Employment Profile

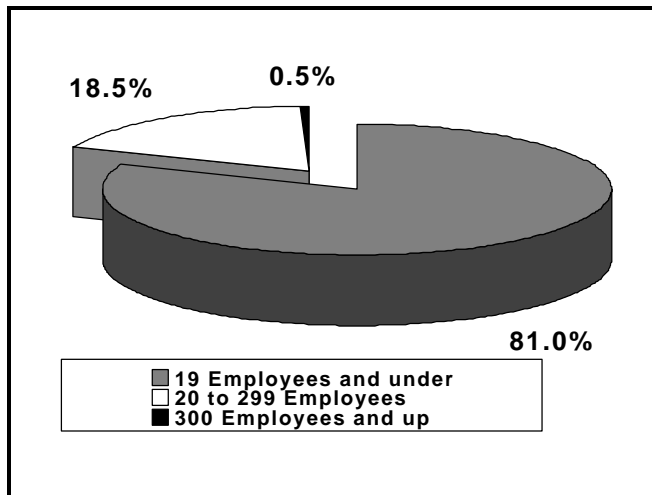
The City of Mississauga is a major regional employer. The 2000 Mississauga Employment Survey revealed that the City had a total of 366,000 employment positions at the end of 2000. This is an increase of 20,500 employment positions from the total estimated employment of 345,500 in 1999. Businesses increased to a total of 20,000 in 2000, from 18,800 in 1999 which represents a year-over-year increase of 6% from 1999 to 2000. These employment figures indicate that Mississauga is importing approximately 55,700 employees.

| Employment and Businesses in Mississauga 1999 and 2000 | | | |
|---|---------|---------|----------|
| | 1999 | 2000 | % Change |
| Employment | 345,500 | 366,000 | 6% |
| Businesses | 18,800 | 20,000 | 6% |

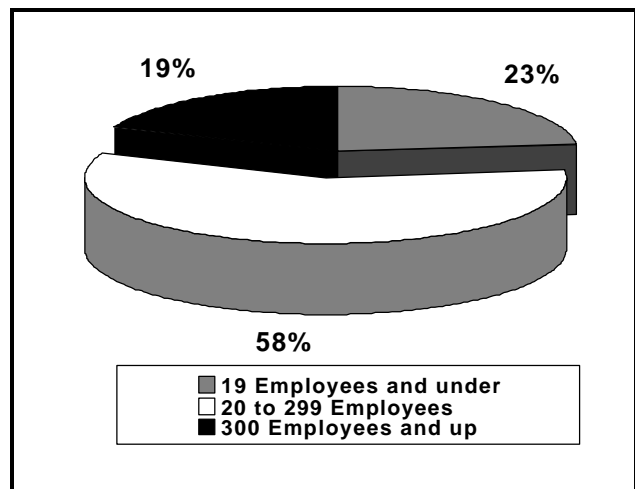
Businesses were concentrated heavily in the Employment Districts in the northern part of the City. Fifty-two percent of the businesses in the City were found in the Northeast, Gateway, Meadowvale Business Park, and Airport Corporate Planning Districts and Lester B. Pearson International Airport (See map on page 8).

An analysis of businesses by business size found that a significant portion of the businesses operating in the City were small establishments. Where size is measured by the number of employees, firms with fewer than 20 employees, represented 81% of the total businesses in the City. Although small firms make up the largest portion of businesses, mid-size firms account for the majority of employment opportunities. Mid sized firms of between 20 and 300 employees had 58% of total employment in the City.

Percent of Businesses by Business Size



Percent of Employees by Business Size



The dominant business activities in Mississauga have been prevalent for over a decade. The largest proportion of employees are in manufacturing industries. Although employment in manufacturing has declined from 33.6% of total employment in 1987 to 27.4% in 2000, it continues to represent the largest concentration of businesses and employment. The decline in the industry reflects the overall restructuring in the manufacturing sector over the last economic cycle. Wholesaling is ranked second in terms of businesses and employment. It had 12% of total employment positions in 1987 and 18.3% of employment positions in 2000.

Overall, the Employment Survey found that Mississauga had businesses in all size ranges and all employment classifications. This speaks to the diversity of employment and business activity in the City.

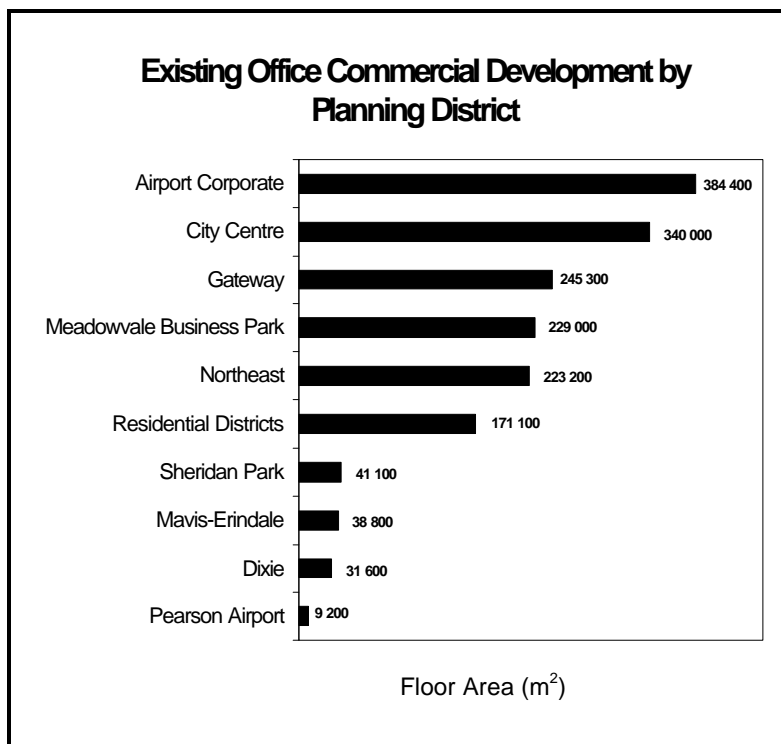
Office Market

Existing office commercial development is defined as office development that is built, under construction or for which a building permit has been issued.

The total amount of existing office commercial development as of December 31, 2000 is 1 714 400 m² (18,454,000 sq.ft.) which represents 17% of the City's office commercial capacity.

The Airport Corporate and City Centre planning districts account for over 40% of existing office commercial development in the City. Other employment districts with significant office commercial floor space include Gateway, Meadowvale Business Park and Northeast.

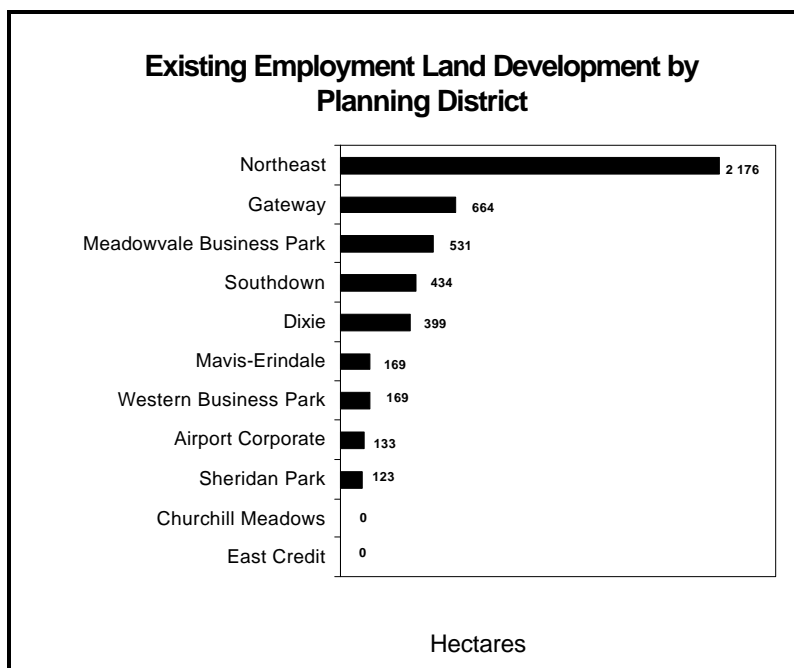
In 2000, the greatest amount of new office floor space was added to the Gateway Planning District, where two new buildings were issued foundation to roof permits for a total of 16 700 m² (180,000 sq.ft.). The largest building issued a permit during this year is also located in this district. This building, constructed for Maritz Canada, is located at 6900 Maritz Drive and adds a total of 9 300 m² (101,000 sq.ft.) of floor space to existing office commercial development.



Employment Lands

The total area of developed employment lands in the City of Mississauga was 4 798 hectares (11,857 acres). The Northeast District has the most significant concentration with 2 176 hectares (5,378 acres). This is followed by Gateway with 664 hectares (1,640 acres) and Meadowvale Business Park with 531 hectares (1,313 acres).

Developed employment lands represent 73% of the employment lands capacity in Mississauga. Among the undeveloped employment lands 16% are in committed lands which are designated and zoned for employment; 7% are in potential lands where zoning does not conform to the employment land designation; and 4% are in endorsed development applications where Council has adopted a recommendation approving an application.



Retail Commercial Trends

Existing retail commercial centre development totalled 1 139 400 m² (12,265,000 sq.ft.) or 85% of the City's retail commercial centre capacity. Each planning district within the City is well served by existing retail facilities with the exception of Churchill Meadows and Meadowvale Village which are currently being developed.

The City Centre has an active and growing retail presence and has recently undergone a major expansion. In 2000, the development of the first phase of a new special purpose commercial centre at Winston Churchill and Highway 401 and the expansion of the Heartland Power Centre began. As well, a number of new convenience and neighbourhood commercial centres were built or issued permits.

Recent retailing trends have included consolidation within the book, grocery and home improvement industry. In addition, the continued introduction of U.S. retailers into the Canadian marketplace is another trend and is expected to result in profound changes to the Canadian retailing landscape over time.

Other trends include the development of more mall kiosk retail space which was traditionally seasonally based and intended to be temporary. This space allows smaller retailers into the mall retail market at a more price conscious entry point.



Heartland Power Centre

| Number of Existing Retail Centres by Type of Centre and Size | | |
|---|------------|--|
| Convenience | 66 | 73 100 m ² (787,000 sq.ft.) |
| Neighbourhood | 57 | 349 500 m ² (3,762,000 sq.ft.) |
| District | 11 | 281 000 m ² (3,026,000 sq.ft.) |
| Regional | 1 | 91 400 m ² (984,000 sq.ft.) |
| City Centre (Square One only) | 1 | 158 000 m ² (1,700,000 sq.ft.) |
| Special Purpose Commercial | 4 | 175 000 m ² (1,884,000 sq.ft.) |
| Employment Commercial | 3 | 11 300 m ² (122,000 sq.ft.) |
| TOTAL | 143 | 1 139 400 m² (12,265,000 sq.ft.) |

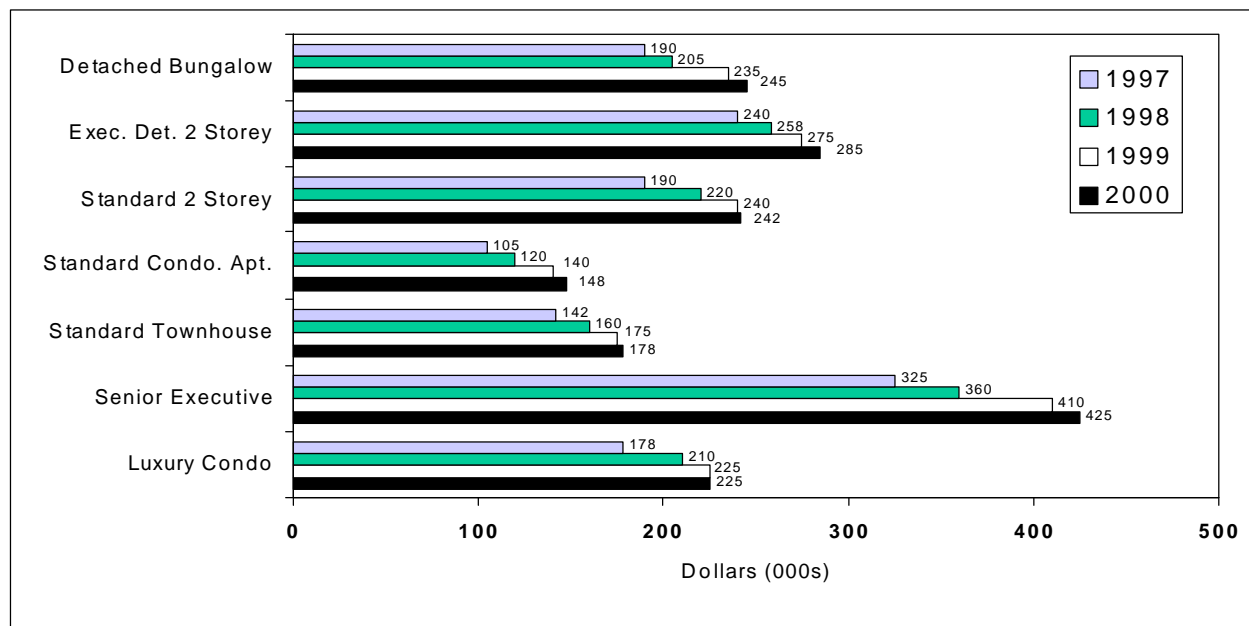
Existing Retail Commercial Development Outside of Centres

In addition to the 158 000 m² (1,700,000 sq.ft.) of floor area in the Square One Shopping Centre, City Centre currently has another 44 000 m² (473,600 sq.ft.) in the entertainment focused uses along Rathburn Road and retail commercial uses within the various office towers located throughout City Centre. In total, City Centre has approximately 202 000 m² (2.2 million sq.ft.) of retail space.

Retail commercial development also exists outside of centres and includes the traditional mainstreet areas, other concentrations of retail development, and isolated retail sites throughout the residential and employment planning districts. Together these areas and sites add approximately 2 million m² (21 million sq.ft.) of retail commercial space to the City's inventory.

Adding the space in retail commercial centres (approximately 1.14 million m² /12.3 million sq.ft.) to the retail commercial space outside of centres (approximately 2.04 million m² /21.5 million sq.ft.), Mississauga has a total of approximately 3.2 million m² (34 million sq.ft.) of existing retail commercial space.

House Prices in Mississauga, 1997-2000 (excluding Meadowvale/Streetsville)



Note: Prices are for fourth quarter of each year (October to December).

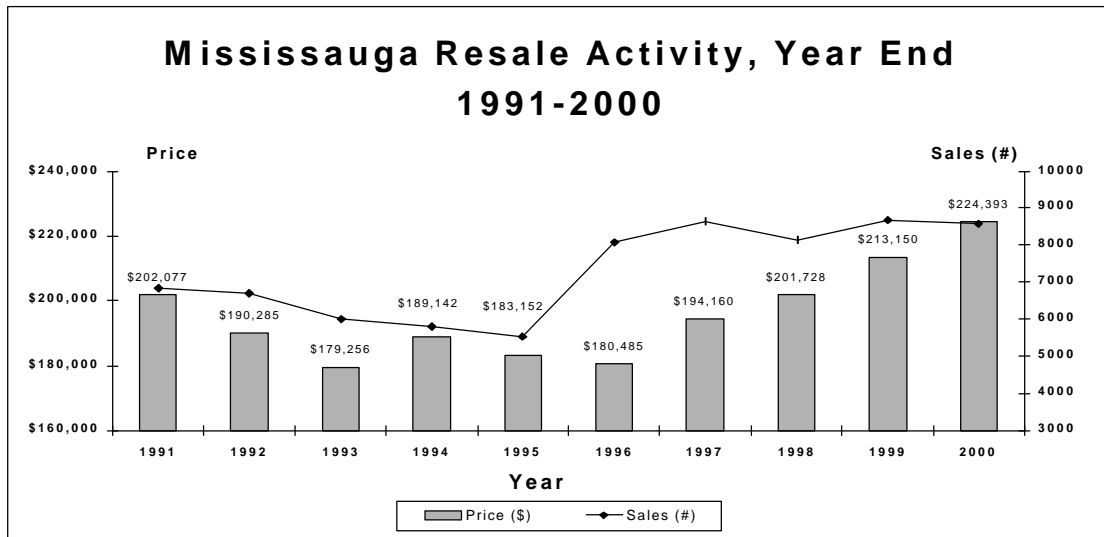
Source: Royal LePage Survey of Canadian House Prices

Housing

The housing market in 2000 was fuelled by the strong Ontario economy. Total housing starts, at 71,521 represent an eleven year high in the province. In Mississauga, a total of 4,905 residential units were issued building permits in 2000. Although this was 8% below the 5,274 units issued permits in 1999, 2000 was one of the stronger years for residential construction in the past ten years.

Resale activity in the City, as illustrated by real estate transactions, reached 8,573 units in 2000. This is the highest number of resale transactions in the decade. The average value of resale homes increased to \$224,393, 5% above the 1999 average value. A review of resale prices by type of dwelling indicated that, year-over-year, resale prices increased between 1% and 6%. Luxury condominiums were the exception as the average resale price remained constant between 1999 and 2000. The Royal LePage Survey of Canadian House prices attributes the demand from move-up and second time home buyers for single detached housing and first-time buyer interest with the performance of the high-rise, townhome and semi-detached markets.

Strong job and migration trends with only modest increases in private rental housing contributed to a tighter than normal rental housing market. Rental accommodation was in short supply and vacancy rates in Mississauga rental housing declined for all types of rental housing in 2000. A strong local economy is the principle cause. As well, immigration, an increasing young renter-aged population, and declining affordability in the housing market put additional pressure on vacancies. Imbalances between demand and supply continues to put upward pressure on the price of rental housing. In Mississauga, with the exception of bachelor units, rents have increased between 9% and 11% for every type of rental unit.



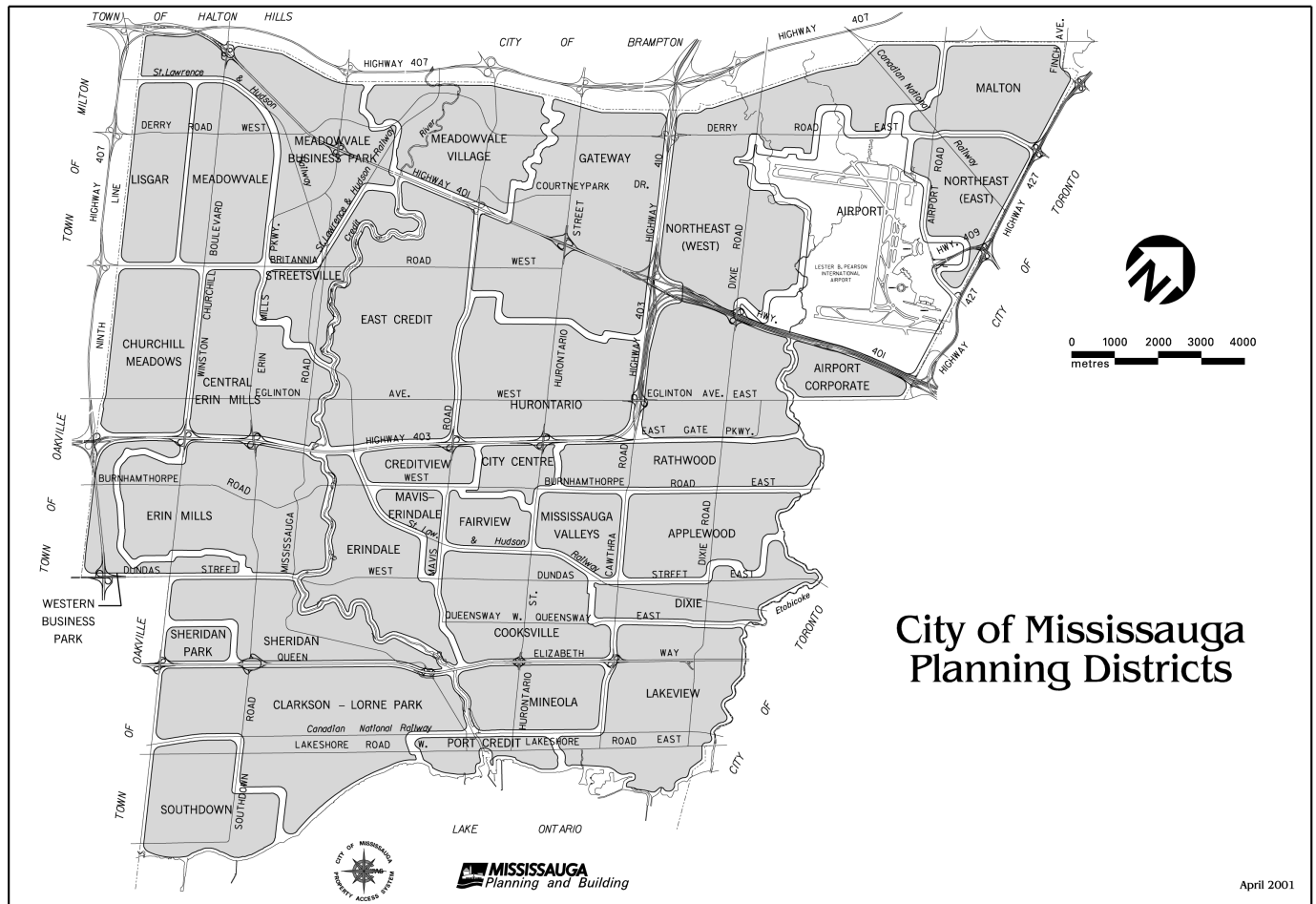
City of Mississauga Vacancy Rates, 3 Units and Over October 1996-2000

| Year | Overall % | Bachelor % | 1 Bedroom % | 2 Bedroom % | 3 Bedroom % |
|------|-----------|------------|-------------|-------------|-------------|
| 1996 | 1.7 | 2.3 | 1.4 | 1.8 | 1.6 |
| 1997 | 0.9 | 0.8 | 1.0 | 0.9 | 0.8 |
| 1998 | 0.7 | 0.7 | 0.7 | 0.6 | 0.8 |
| 1999 | 0.8 | 0.9 | 0.9 | 0.7 | 1.0 |
| 2000 | 0.5 | 0.4 | 0.5 | 0.4 | 0.7 |

Average Rents for the City of Mississauga October 1996-2000

| Unit Type/Area | Year/\$ | | | | |
|----------------|---------|-------|---------|---------|---------|
| | 1996 | 1997 | 1998 | 1999 | 2000 |
| Bachelor | \$578 | \$589 | \$639 | \$695 | \$666 |
| 1 Bedroom | \$699 | \$714 | \$758 | \$771 | \$837 |
| 2 Bedroom | \$847 | \$845 | \$901 | \$898 | \$994 |
| 3 Bedroom | \$914 | \$910 | \$1,003 | \$1,016 | \$1,111 |

Sources: CMHC "Rental Market Report", "Housing Now Newsletter"; CHBA "Pulse Survey"; TREB "Market Watch", "Commercial Realty Watch"; Colliers International "Canadian Real Estate News 1999-2000"; Royal LePage "Survey of Canadian House Prices"; Statistics Canada "Building Permits"; RealNet Canada.



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