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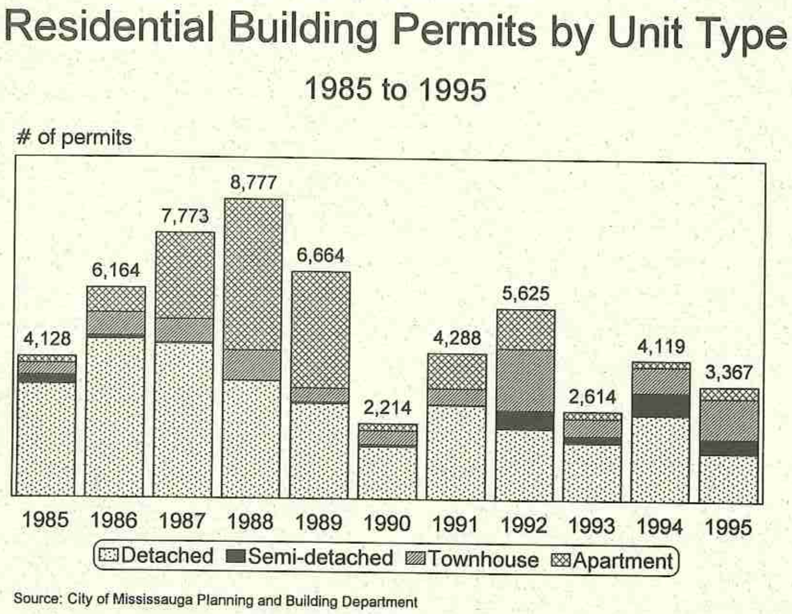
□ POLICY PLANNING DIVISION □

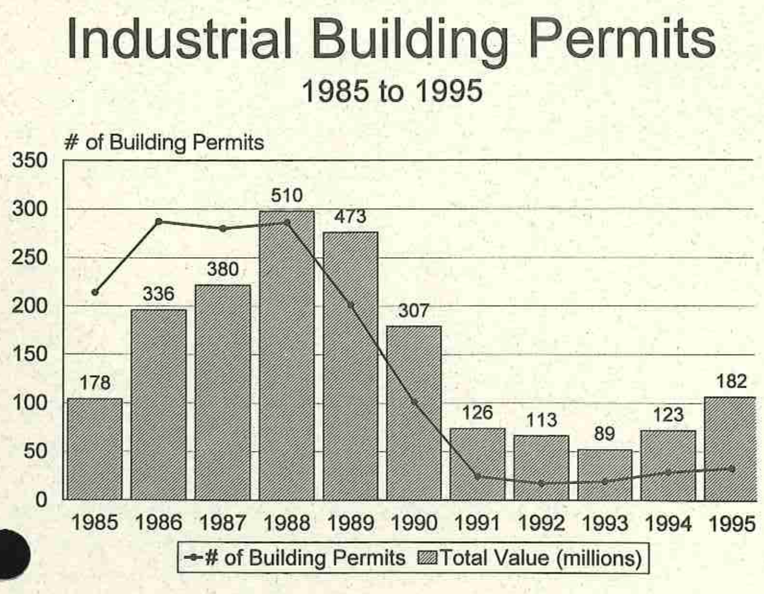
DEVELOPMENT UPDATE

THE CITY OF MISSISSAUGA PLANNING AND BUILDING DEPARTMENT

□ REPORT ON YEAR END 1995 □

A Review of Building Permits





Inside This Issue:

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Mississauga Market Conditions

Housing

The existing housing stock in the City of Mississauga as of December, 1995 consisted of 168,798 units, a one percent increase from the same period last year. The mix of dwelling types have remained stable with detached houses and apartments making up the largest portions at 45% and 33% respectively. Townhouses represent 11% and semi-detached units also represent 11% of the total housing stock.

Construction activity in 1995 was characterized by an overall decrease in building permits and housing starts. Building permits decreased by 18% compared to 1994. Detached and semi-detached building permits decreased by 44% and 35% respectively, however, townhouse and apartment units increased significantly by 56% and 91% respectively. Housing starts decreased by approximately 20% from 1994 to 1995; however, townhouse units increased by 54% along with apartment units by 55%.

Mississauga continues to have a large supply of land ready for building permits; these are unbuilt units on registered plans or zoned lands. There is a capacity of approximately 27,750 units in this category of which 76% are apartments. The number of draft approved units has increased by 28% from December, 1994 and stands at 14,260 units. Again, apartments represent the largest share, with detached units representing the next largest share. Lands under application for development but not yet draft approved remains relatively stable at 35,740 units. Mississauga has lands to accommodate approximately 35,110 units designated for residential development which are not developed or under application for development.

Opportunities in the housing market have improved from 1994 as is evident in the 29% increase in the number of residential resales. Although the average resale house price decreased slightly from 1994 to 1995, the three-year mortgage rate remained stable at approximately 9%. The decrease in average resale price is likely not attributed to a depressed market given the increase in number of resales. Rather, this decrease in resale price is more indicative of a shift in the market demand for housing type. That is, a shift to smaller and/or different types of homes, such as townhouses. This market shift is also reflected in the breakdown of construction activity as discussed above.

Rental vacancy rates have fallen, from 1.4% in October 1994 to 0.6% in October, 1995.

The Housing Strategy prepared for Mississauga proposed several targets for residential development. Approximately 65% to 75% of the ultimate housing stock by type has been achieved for all but townhouses; only 53% of the target townhouse stock has been built.

Office

The office market continues to improve slowly from the oversupply generated in the 1980's. The vacancy rate for the Toronto Census Metropolitan Area (Toronto CMA) dropped from 17.4% at the end of 1994 to 16.4% in 1995. Although vacancy rates continue to drop throughout the Toronto CMA, no new office construction is anticipated.

Vacancy rates for office space in Metro West (comprised of Mississauga, Oakville, Brampton and Etobicoke) continued to decline from 21.1% in 1994 to 17.3% at the end of 1995. Leasing activity was slightly lower than in 1994, and a great deal of this activity consisted of companies moving between buildings in search of more competitive prices. According to Royal LePage projections, the vacancy rate for this market is anticipated to drop to 14.9% by the end of 1996.

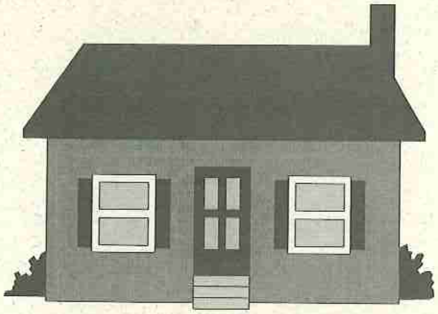
The inventory levels for the Toronto CMA and the Metro West market are virtually unchanged at 13.6 million m² (146.9 million sq ft) and 2.3 million m² (25 million sq ft) respecively. Mississauga continues to hold approximately 11% of the total inventory in the Toronto CMA.

Within Mississauga, the Meadowvale and Airport markets were most active during 1995 with respective absorption at 23 and 11 percent of their total inventory. These markets, in addition to the Mississauga City Centre, continue to attract new tenants because of a good supply of class A space, relatively low taxation, high visibility and competitive lease rates. According to Royal LePage, the office markets in City Centre and the Airport will have significant office development occuring in 1996. Preliminary research indicates a possible vacancy rate drop to near 10% in the City Centre market.

Housing

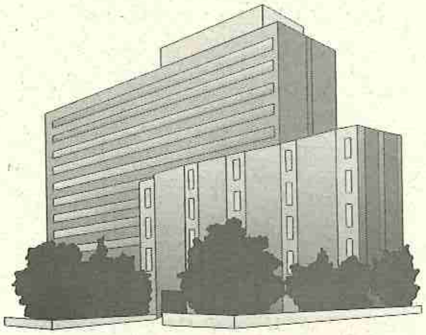
Housing Development Activity

Construction Activity 1995 Total	Detached	Semi-detached	Townhouse	Apartment	Total
Building Permits	1,406	427	1,189	345	3,367
Housing Starts[1]	1,289	356	1,120	499	3,264
Application Activity as of December 31	**Detached**	**Semi-detached**	**Townhouse**	**Apartment**	**Total**
Unbuilt Units on Registered Plans or Zoned Lands	3,398	357	2,963	21,035	27,753
Draft Approved	4,063	1,128	1,990	7,082	14,263
Under Application for Development	7,115	3,182	7,026	18,421	35,744
Lands Designated, Not Under Application for Development	8,856	48	8,070	18,139	35,113
Existing Units	75,740	18,432	19,568	55,058	168,798
Total	99,172	23,147	39,617	119,735	281,671



Housing Market Indicators

(For the Month of December)	1994	1995	Increase or Decrease
Residential Resales[2]	264	341	Increased by 29%
Average Resale House Price[2]	$187,380	$180,877	Decreased by 3.5%
Three-Year Mortgage Rate[1]	8.82%	8.88%	Increased by 7%
Average Rental Rate 2 Bedrooms (October)[1]	$813	$832	Increased by 2.3%
Rental Vacancy Rate (October)[1]	1.4%	%0.6	Decreased by 57%



Housing Policy Targets

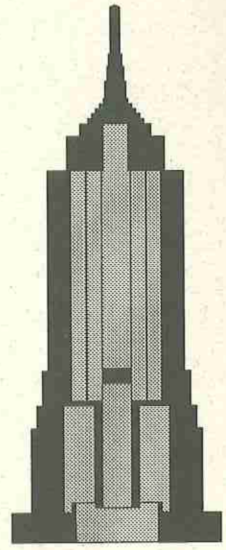
Housing Targets	Target	Achieved %
Dwelling Units		
Short Term Target	197,000	86%
Ultimate Target	245,000	69%
Ultimate Housing Stock		
Detached	98,000	77%
Semi-detached	24,500	75%
Townhouse	36,750	53%
Apartments	85,750	64%

Tenure Targets	Target	Achieved %
Ultimate Tenure Split		
Ownership	60%	65%[3]
Rental	40%	35%[3]
Average Annual Target Rental Units	1,700	499 (29%)
Non-Profit Units	550	499 (91%)
Average Annual Ownership Units	2,700	2,765 (102%)
Low Density	1,350	1,645 (122%)
Medium Density	900	1120 (124%)
High Density	450	0 (0%)

Source: City of Mississauga Planning & Building Department
[1] CMHC Local Housing Market Report and Rental Market Report
[2] Canadian Real Estate Association
[3] Statistics Canada, Census 1991

Office Commercial

Office Node	Existing m² (sq.ft)	# Bldgs	On-Stream m² (sq.ft)	# Bldgs
Airport Corporate	250 223 (2,693,466)	34	53 149 (572,104)	4
Airport (Others)	193 353 (2,081,302)	27	31 757 (314,841)	3
City Centre	337 310 (3,630,893)	24	46 982 (505,727)	3
Cooksville	65 845 (708,773)	11	10 191 (109,698)	5
Hurontario	159 379 (1,715,597)	24	667 142 (7,181,292)	12
Meadowvale	151,515 (1 ,630,947)	29	176 186 (1,896,512)	9
Sheridan	36 178 (389,412)	5	0	0
Other	126 158 (1,357,998)	30	63 793 (686,685)	9
Total	1 319 961 (14,208,406)	184	1 049 200 (11,293,864)	45



Source: City of Mississauga Planning and Building Department
Note: A building moves from the on-stream inventory to the existing inventory once the building permit has been issued.

Retail Commercial

As of December, 1995	Regional		District		Neighbourhood		Convenience		Other[1]		Total
	GFA* m² (sq.ft.)	#	GFA m² (sq.ft)	#	GFA m² (sq.ft)	#	GFA m² (sq.ft.)	#	GFA m² (sq.ft.)	#	GFA m² (sq.ft.)
Existing	180 720 (1,945,317)	2	343 463 (3,697,120)	10	277 031 (2,982,034)	36	128 609 (1,384,381)	89	179 776 (2,090,179)	30	1 109 599 (11,944,015)
Unbuilt Units on Registered Plans or Zoned Lands:											
Approved Site Plans	-	-	-	-	3 479 (37,449)	1	-	-	-	-	3 479 (37,449)
Site Plans Submitted	-	-	10 951 (117,879)	1	15 821 (139,688)	3	3 386 (29,515)	2	1 122 (12,078)	1	31 280 (336,706)
No Site Plan Submitted	-	-	14 632 (157,503)	1	9 290 (100,000)	1	21 246 (228,698)	14	99 116 (1,066,911)	8	144 284 (1,553,111)
Draft Approved	-	-	6 503 (70,000)	2	-	-	11 730 (126,265	3	4 502 (48,461)	2	22 735 (244,726)
Under Application for Development	-	-	10 219 (110,000)	1	55 770 (600,323)	5	16 209 (174,478)	11	51 150 (550,592)	8	133 348 (1,435,393)
Lands Designated, Not Under Application for Development	-	-	-	-	9 290 (100,000)	1	5 400 (58,127)	3	-	-	14 690 (158,127)
Additions	-	-	159 (1,712)	0	883 (9,505)	0	-	-	-	-	1 042 (11,216)
Total	180 720 (1,945,317)	2	385 927 (4,154,220)	20	371 564 (3,999,612)	47	186 580 (2,008,396)	12 2	335 666 (3,613,197)	49	1 460 457 (15,720,742)

Source: City of Mississauga Planning and Building Department
*GFA refers to Gross Floor A

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

Industrial

Industrial Application Activity

December 1995	Heavy		General		Prestige (includes Office)		Mixed Industrial & Commercial		Total	
	Hectares	Acres	Hectares	Acres	Hectares	Acres	Hectares	Acres	Hectares	Acres
Unbuilt Registered Plans or Zoned Lands	93	230	576	1,423	691	1,707	91	225	1 451	3,585
Draft Approved	0	0	98	242	310	766	0	0	408	1,008
Under Application for Development	0	0	112	275	230	568	2	5	344	848
Lands Designated Not Under Application for Development	0	0	237	587	150	371	46	114	433	1072
Existing	409	1,011	2 449	6,051	1 087	2,686	421	1,040	4 366	10,788
Total	502	1,241	3 472	8,578	2 468	6,098	560	1,384	7 002	17,301

Source: City of Mississauga Planning and Building Department

Retail Commercial

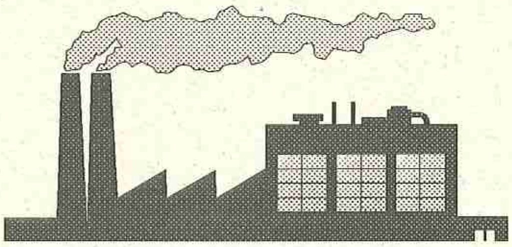
The existing gross floor area of retail space in the City of Mississauga as of December 1995 included over one million m^2 (11.9 million sq.ft.). District Centres comprise the largest portion with 31% of this space, followed by Neighbourhood and Regional Centres representing 25% and 16% respectively. Convenience and the Other category represent the smallest portions at 12% and 16% respectively.

On-stream retail commercial space is made up of District, Neighbourhood, Convenience, and Other types of retail space. On-stream, which includes unbuilt development proposals on registered plans or zoned lands, and development proposals that have been draft approved or are under application for development, totalled 335 000m^2 (3.6 million sq.ft.). Lands designated for retail commercial space but not yet under application include a total of 14 690m^2 (158,127 sq.ft); 63% of this space is in the form of Neighbourhood Centres and 37% Convenience Centres.

As of December 1995 the total retail commercial space, including existing, on-stream, designated lands and additions, is 1 460 460 m^2 (15.7 million sq.ft.) with District and Neighbourhood Centres representing 26% and 25%, respectively. Regional and Convenience Centres each represent approximately 13% and Other centres 24%.

Included in the existing space are two Power Centres. One is located on lands designated District Commercial and Mixed Industrial and Commercial on the south-east quadrant of Mavis Road and Britannia road. The other location is comprised of various sites and landowners along Dundas Road West at Winston Churchill Boulevard. These sites collectively function as a Power Centre.

Industrial



At year end 1995 Mississauga had approximately 4,366 ha (10,788ac) of land developed for industrial purposes. Most was designated as General Industrial (56%), followed by Prestige Industrial (25%), Mixed Industrial and Commercial (10%) and Heavy Industrial (9%).

Mississauga has 1,859 ha (4,593ac) of land registered and zoned or draft approved for industrial purposes. An additional 344 ha (848ac) of land are under application for development, and 433 ha (1072 ac) of land are designated for industrial uses but have not been developed and no application activity has occurred. There were 33 new industrial permits issued in 1995 (prescribed value \$182,000,000), compared with the 29 permits issued in 1994 (prescribed value of \$123,000,000). ♦

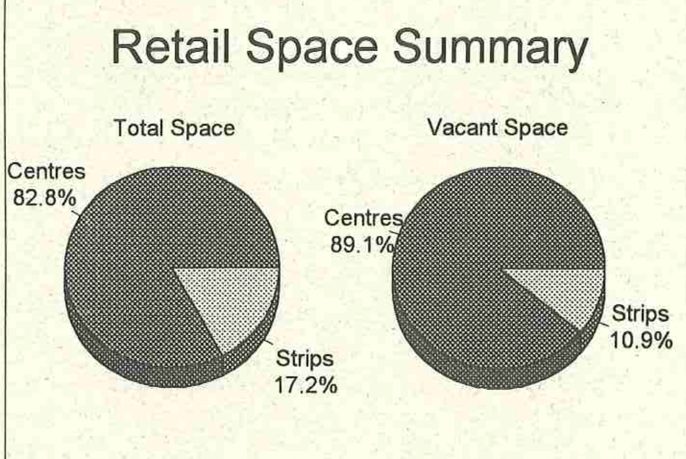
Retail Inventory Profile

In March 1995, the Planning and Building Department employed the Centre for the Study of Commercial Activity (CSCA) based at Ryerson Polytechnic University to update the **Retail Inventory**. The inventory was completed in September 1995, and is currently being operated through the Planning and Building Department. The CSCA collected information on both retail strips and commercial centres and includes details such as centre name; address; business name; industry type (Standard Industrial Code); floor area; employment; ethnicity; and structure type. The CSCA collected information for retail and service commercial uses along retail strips and in centres (malls, plazas, etc.). The database does not include information on Highway Commercial sites, or accessory retail uses in office or industrial buildings.

The database is primarily used for the evaluation of retail development when conducting and reviewing market studies and retail strategies, and as background information for various planning studies. Further, the database forms an important part of the Planning and Building Department's monitoring function, of the amount and type of retail space in Mississauga, and is used in response to enquiries from other departments, industry, and the public.

The existing gross leasable area of retail space in the City of Mississauga as of August 1995, included 4,589 businesses and 1 295 327 m^2 (13,943,238 sq. ft.). Eighty-three percent of the retail space was found in centres and 17% along retail strips (Figure 1). Of a total 207 centres, there were two Regional Centres and 10 District Centres. The balance was comprised of Neighbourhood Centres, Convenience Centres, and others such as the Home and Design Centre.

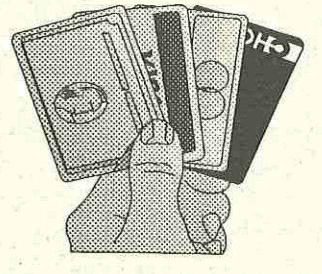
Figure 1



Vacancy levels are an important indicator of real estate market conditions. A healthy retail real estate market would reflect a vacancy level in the range of five to ten percent. As of August 1995, the retail vacancy rate in Mississauga was 6.7%. Commercial Centres demonstrated a vacancy rate of 7.2% and 89.1% share of the total vacant space, whereas strips had a 4.2% vacancy and 10.9% share of total vacant space (Figure 1).

The retail inventory identifies a total of approximately 17,300 full time employees of which 79.1% were within centres. The centres' lower proportion of total employees than total space (gross leasable area) as compared against the respective proportion for strips is likely attributed to the higher vacancy levels in centres.

With respect to retail type, the retail businesses (excluding Other Businesses) which occupy the largest amount of space included general merchandise stores, furnishings and appliances, and supermarkets at 14.2%, 11.3% and 10.8%, respectively (Figure 2). The largest space users in centres were comparable to the total including general merchandise stores (16.1%), supermarkets and grocery stores (12.6%), and furnishings and appliances (9.2%). Strips, however, demonstrated a different distribution of space with furnishings and appliances at 21.2%, restaurants at 8.4%, and other semi-durable stores (books and stationary stores, florists, garden centres, hardware stores, hobby stores, gift stores, etc.) at 6.7%. *(continued on page 8)*



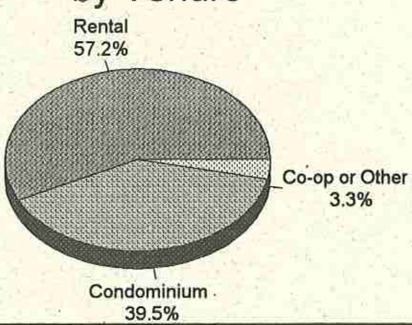
Residential Multiple Unit Inventory Profile

The Residential Multiple Unit Inventory, originally initiated in the mid 1980's, is an electronic database that contains information on existing townhouse and apartment sites within the City. In March 1995, a comprehensive review of the database was undertaken, and consequently it has been updated and expanded. It will continue to be maintained by the Planning and Building Department.

The database consists of two separate tables, a property table and a building table, linked by a common identity number. The property table contains general information such as location, site area, planning district, the total number of units, the number of parking spaces and the provision of amenities. The building table contains more detailed information such as building type, building height, tenure, and the number of bedrooms in each unit. The database contains information regarding 867 townhouse and apartment sites.

Figure 1

Existing Apartment Units by Tenure

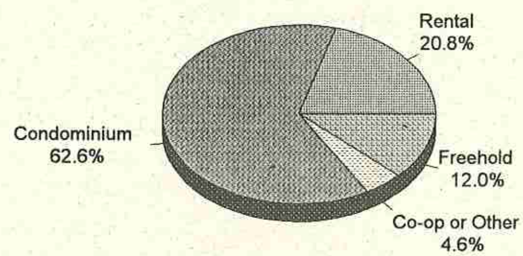


There are 472 existing apartment buildings recorded within the City, which account for a total of 52,187 separate units. Figure 1 illustrates that of the 52,187 existing apartment units recorded, 57.2% are rental in tenure, 39.5% are condominiums, 2.8% are co-operatives and residential institutions account for 289 units (0.5%). Of the total number of rental units, 4,318 units (14.4%) are Peel Living and 2,918 units (9.8%) are Private Non-Profit. Rental apartments for senior citizens account for 5.2% of all rental apartment units within the City. Approximately 44.2% of the existing apartment units within the City are located in the Cooksville, Applewood and Mississauga Valleys planning districts.

Sixty-two apartment sites have more than one building, and of the total number of units within the City, 7% of all existing apartment units are located in buildings less than five storeys in height. Twenty-one percent are located in buildings between five and nine storeys in height, 48% are located in buildings between 10 and 19 storeys in height, and 24% are located in buildings greater than 20 storeys high. With respect to the provision of outdoor amenities, 78% of all apartment units have access to play equipment, 23% of all the apartment units within the City have access to an outdoor swimming pool and 24% have access to an outdoor tennis court. Nine percent of all apartment units have access to all three types of outdoor amenities.

Figure 2

Existing Townshouse Units by Tenure

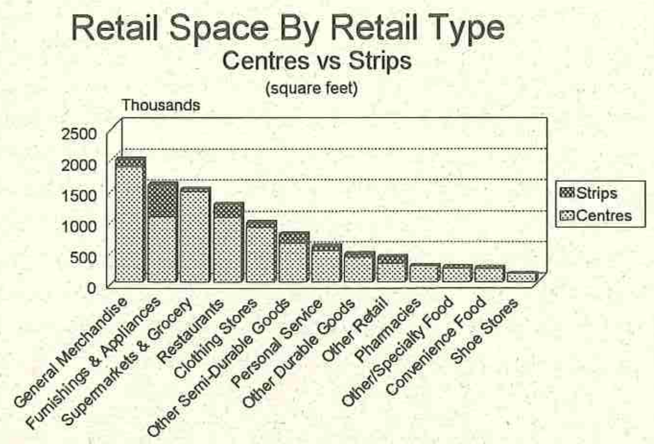


There are 418 existing townhouse sites within the City, which account for 24,472 individual townhouses. Figure 2 illustrates that of the 24,472 units recorded, 20.8% are rental, 62.6% are condominiums, 12% are freehold and 4.6% are co-operatives. Eighty percent of all townhouse units have access to outdoor play equipment, 5.3% have access to an outdoor tennis court and 22.4% have access to an outdoor swimming pool. Approximately 3.4% of all townhouse units have access to all three types of outdoor amenities. The Erin Mills, Meadowvale and Hurontario planning districts together account for approximately 41.2% of the total number of townhouse units.

A detailed report on the Residential Multiple Unit Inventory is available through the Planning and Building Department.♦

Retail Inventory Profile *(continued from page 7)*

Figure 2



The largest number of businesses include restaurants with 13.4%, personal service with 10.1% and clothing stores with 8.1%. Both centres and strips demonstrated a somewhat similar distribution with respect to number of businesses. Total number of businesses in centres include 13.5% restaurants, 10.3% personal service, and 8.8% clothing stores. Strips identify 12.8% in the restaurant businesses, 9.02% in the personal service business, and 5.5% in other retail stores (liquor/wine/beer stores, opticians' stores, art galleries, luggage and leather goods stores, pet stores, etc.) .

The total gross leasable area derived from this database differs from the amount presented on page 4. This is as a result of two different data sources. Also, the Ryerson inventory includes retail strips and commercial centres whereas the inventory presented on page 4 includes commercial centres along with mixed industrial and commercial facilities but excludes traditional main street retail strips. It is the intention of the Planning and Building Department to create one inventory which combines information from both databases and correct any data discrepancies that may exist. It is also intended that the Retail Inventory be improved and updated annually. In addition, the inventory will form part of the Policy Planning Database which will include information on all businesses within the City of Mississauga. A detailed report on the Retail Inventory is available through the Planning and Building Department.♦

MISSISSAUGA

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Development Related Publications:

Listings of Rezoning & Subdivision Applications

Listing of Approved & Outstanding Site Plans

Monthly Status of Industrial Development

Monthly Status of Residential Development

Multiple Unit Inventory by Planning District

Existing & On-Stream Retail Commercial Inventory by Planning District

Existing & On-Stream Office Inventory by Planning District

Summary of Committed Development on Registered Plans (residential month end)

Summary of Development Applications by Planning Districts (residential month end)

Summary of Committed Industrial Lands on Registered Plans

Summary of Industrial Devleopment Applications by Planning District

Monthly Building Permit Summaries

"Development Summary" - Monthly

For more information regarding development related publications, contact:
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