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City of Mississauga, Planning and Building Department

MARKET MATTERS

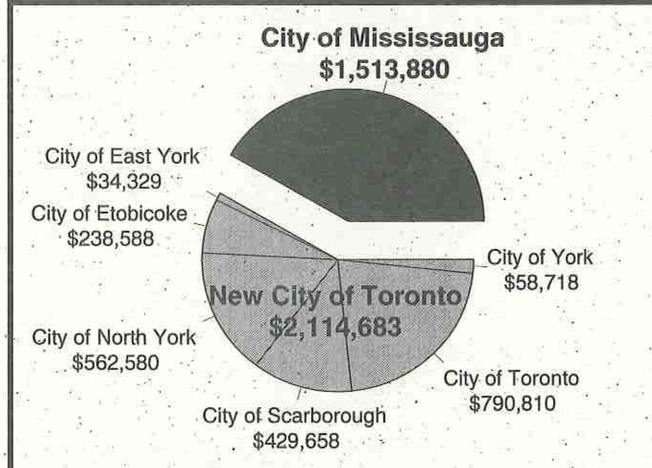
Development Conditions

Development activity during 1997 in Mississauga could be described as steady and strong. This strong growth was evident as building permit values exceeded 1.5 billion.

With the stabilizing of interest rates and lower long-term mortgage rates since the beginning of 1997, consumer confidence in the housing market has remained stable. It is anticipated that if conditions remain the same, 1998 will be another good year for the residential market. According to CMHC in 1997, Mississauga led all other cities in the Toronto CMA with 4,209 housing starts, up 37% from 1996.

According to Colliers Research, Mississauga led the West with the most active industrial leasing market in 1997. The West study area, which consists of Brampton, Burlington, Mississauga, Oakville, Milton and Halton Hills, dominated the leasing market in the GTA with almost 50% of the total industrial space leased in the first half of 1997.

1997 Total Value of Building Permits
Mississauga vs Toronto
(Thousands of Dollars)



Further, Mississauga accounted for over 50% of the total new industrial construction during the first half of 1997 with 2.5 million square feet.

The office market continued to improve in Mississauga with a total of 14 new office buildings under application in 1997. Although declining vacancy rates still indicate available space, custom builds appear more attractive for larger tenants.

The Port Credit Harbour Development is one of many new projects completed in 1997.

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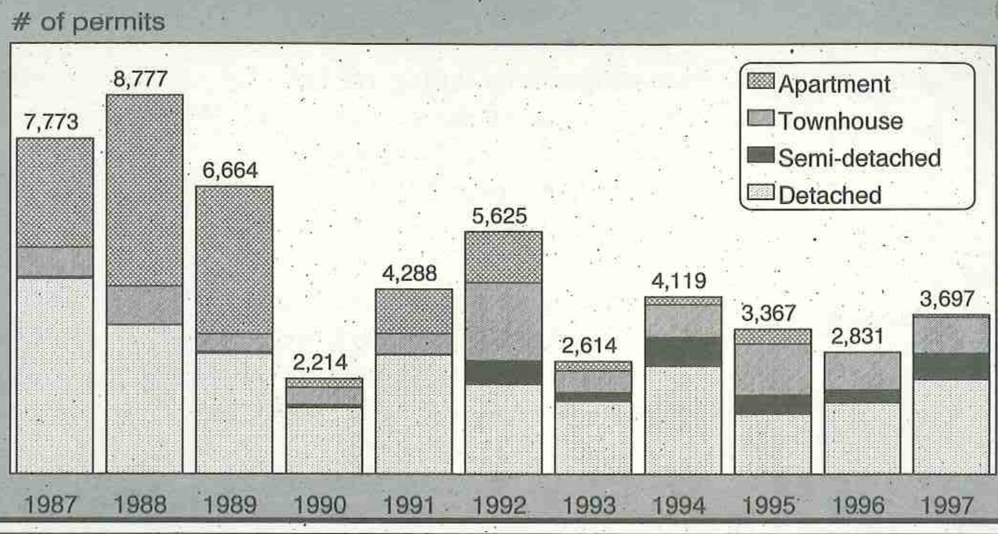
Building Permits

Residential building permit activity in 1997 totalled 3,697 units throughout the four major residential types. Singles and semi-detached dwellings had the most notable increases, townhouses remained consistent and apartment construction remained relatively inactive.

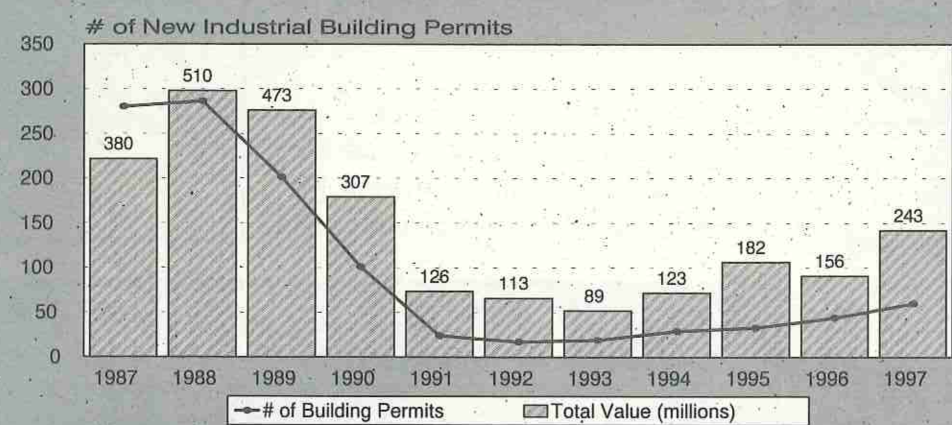
The number of new industrial buildings in 1997 totalled 60, an increase of 16 from 1996. Industrial permit values also increased by 87 million from the year before to reach a total of 243 million.

Permits issued for office and institutional buildings had increases of two and four buildings respectively from 1996.

Residential Building Permits, 1987-1997



Industrial Building Permits, 1987-1997



Industrial/Commercial/Institutional Building Permits, 1997

Type	# of Buildings	Application Area (m^2)	Application Area (sq.ft.)	$ Value
Office	3	53,951	580,743	$196,590,000
Retail	16	119,511	1,286,448	$47,825,000
Industrial	60	866,420	9,326,372	$243,389,000
Institutional	7	106,261	1,143,821	$58,809,000
Total	86	1,146,143	12,337,384	$546,613,000

Statistics Canada Releases 1996 Family Structure & Immigration and Language Data

According to Statistics Canada, a trend has developed in Mississauga's family structure. Although married couples are still the most prominent family type, lone parent families increased marginally from 11.6% in 1991 to 13.2% in 1996. The rate of increase in the total number of families in Mississauga and Ontario has declined. The decline is attributed to couples waiting longer to marry or form a common-law relationship.

Regarding immigration and language, 43% of Mississauga's population are immigrants and Chinese is the most commonly spoken non-official home language. For more information regarding these topics see releases two and three of the Planning and Building Department's "1996 Census Update" publications.

Mississauga Family Types	1986		1991		1996	
Married Couple	89.2%	90,515	82.5%	103,255	80.8%	120,190
Common-Law	N/A	N/A	5.9%	7,400	5.9%	8,815
Lone - Parent	10.8%	10,905	11.6%	14,540	13.2%	19,685
Total Families	**100.0%**	**101,420**	**100.0%**	**125,195**	**100.0%**	**148,690**

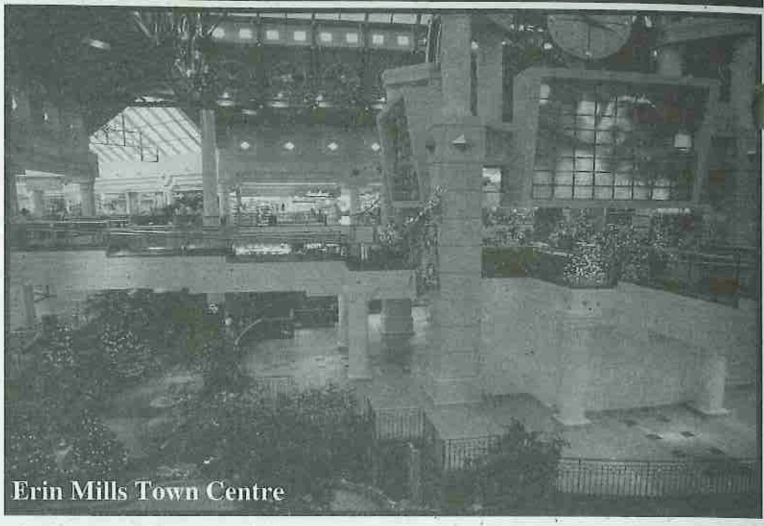
Mississauga Population by Ethnic Origin (Total Responses)

Rank		#	%
Rank	**Total**	**542,450**	**100.0%**
	Single responses	381,885	70.4%
	Multiple responses	160,565	29.6%
1	English	103,115	19.0%
2	Canadian	88,040	16.2%
3	Scottish	63,390	11.7%
4	Irish	57,445	10.6%
5	East Indian	49,450	9.1%
6	Italian	47,365	8.7%
7	Polish	34,905	6.4%
8	Chinese	33,755	6.2%
9	French	30,970	5.7%
10	Portuguese	28,175	5.2%

Total Immigrants and Immigrants Arriving Between 1991 and 1996 in Mississauga

Rank	Place of Birth	Total Immigrants	
		#	%
1	India	23,860	10.2%
2	United Kingdom	19,980	8.5%
3	Poland	19,570	8.3%
4	Philippines	14,310	6.1%
5	Italy	13,780	5.9%
6	Portugal	13,280	5.7%
7	Jamaica	11,855	5.0%
8	Hong Kong	10,270	4.4%
9	Guyana	6,940	3.0%
10	Vietnam	6,575	2.8%
	Other	94,440	40.2%
	Total	234,860	100.0%

Retail Commercial


Erin Mills Town Centre

In 1997, the Policy Planning Division developed a new model for retail planning in Mississauga. In accordance with new City Plan policies, staff prepare Retail and Service Commercial Strategies, which are used as the basis for the preparation and review of new District Policies. The Strategies are also used to assist in the review of retail and service commercial development applications for sites that are not designated for commercial uses in current planning documents.

The Strategies review the potential for additional retail and service commercial uses, and are to be updated every three years. In 1997, the Policy Planning Division produced two new and one updated retail strategy. The Central Area and the Malton Area Retail and Service Commercial Strategies were both new documents, while the Northwest Retail and Service Commercial Strategy was a three year review of the Streetsville Secondary Plan Review - Retail Commercial Strategy. All of these reports are available through the Office of the City Clerk.

Estimated Existing Retail Square Footage, 1997

Planning District	Strip Plazas				Enclosed Malls			
	# of Centres	GLA m2 (sq.ft.)		% of Total	# of Centres	GLA m2 (sq.ft.)		% of Total
Applewood	11	32,548	(350,355)	7.7%	1	3960	(42,626)	0.9%
Central Erin Mills	5	16,653	(179,257)	3.9%	1	73931	(795,813)	16.1%
City Centre	—	—	—	—	1	134751	(1,450,495)	29.4%
Clarkson - Lorne Park	14	44,369	(477,600)	10.5%	—	—	—	—
Cooksville	15	49,303	(530,710)	11.6%	1	1944	(20,926)	0.4%
Creditview	3	12,331	(132,734)	2.9%	—	—	—	—
East Credit	6	24,002	(258,364)	5.7%	—	—	—	—
Erin Mills	7	24,564	(264,413)	5.8%	1	21866	(235,371)	4.8%
Erindale	7	9,195	(98,977)	2.2%	1	16387	(176,394)	3.6%
Fairview	1	9,300	(100,108)	2.2%	—	—	—	—
Hurontario	8	50,976	(548,719)	12.0%	—	—	—	—
Lakeview	10	28,246	(304,047)	6.7%	1	59335	(638,697)	13.0%
Lisgar	1	1,115	(12,002)	0.3%	—	—	—	—
Malton	5	10,277	(110,624)	2.4%	1	29905	(321,905)	6.5%
Meadowvale	15	27,972	(301,098)	6.6%	1	33396	(359,483)	7.3%
Mineola	3	5,698	(61,335)	1.3%	—	—	—	—
Mississauga Valleys	4	12,863	(138,461)	3.0%	—	—	—	—
Port Credit	6	18,033	(194,112)	4.3%	—	—	—	—
Rathwood	3	15,757	(169,612)	3.7%	2	36059	(388,149)	7.9%
Sheridan	4	17,911	(192,799)	4.2%	1	46500	(500,538)	10.2%
Streetsville	6	13,164	(141,701)	3.1%	—	—	—	—
TOTAL	134	424,277	(4,567,028)	100.0%	12	458,034	(4,930,397)	100.0%

***NOTE: Does not include strip retail (eg. Port Credit) or retail in employment districts**

Vacant Employment Land

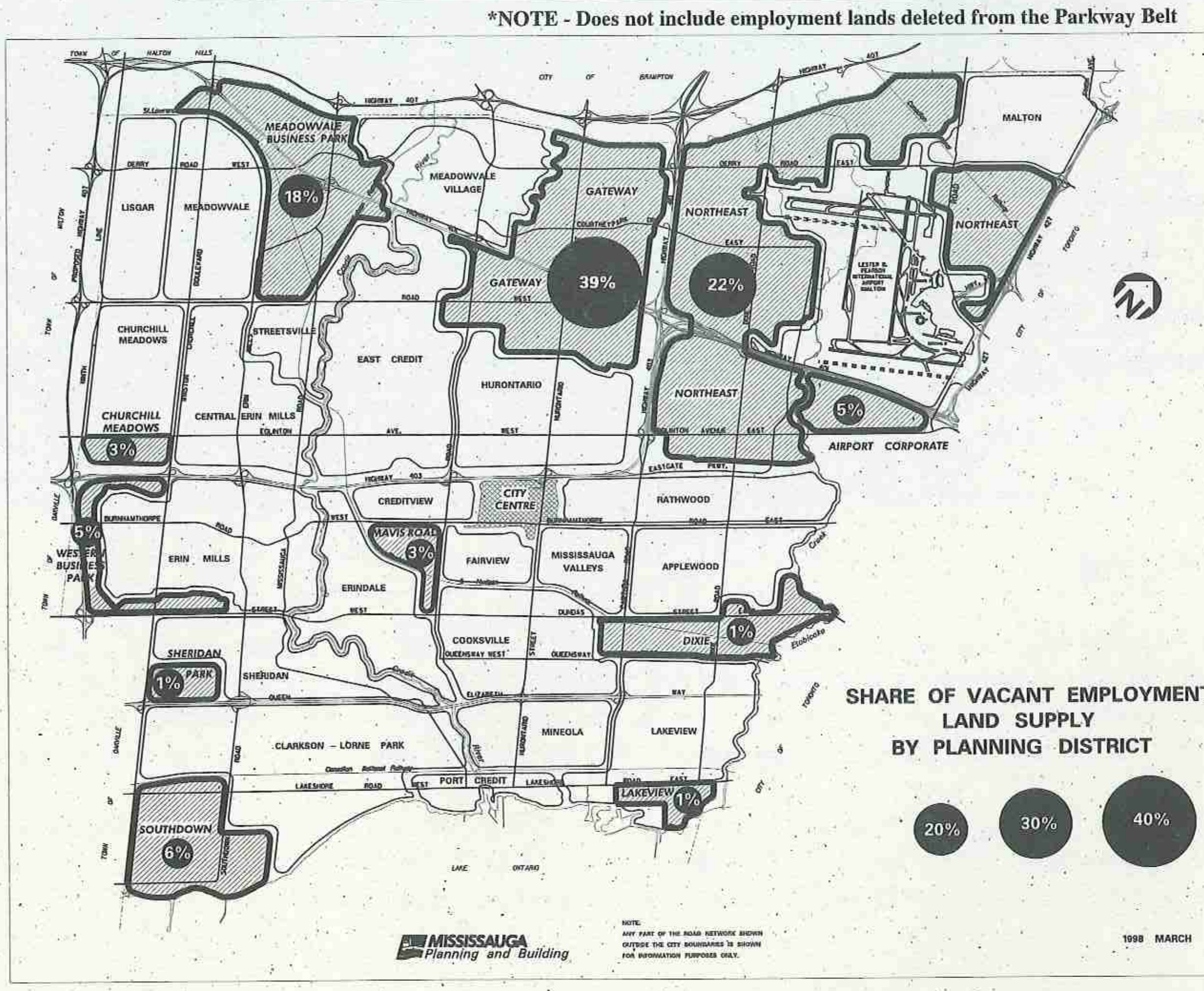
In 1997, Mississauga undertook a study on vacant employment lands. It is anticipated that applications for employment land conversions will increase because of the limited supply of residential lands left in the City. The purpose of the study was to document Mississauga's supply of vacant employment lands to provide a basis for decisions on development applications that involve the conversion of these lands to other uses.

***NOTE - Does not include employment lands deleted from the Parkway Belt**

Available Vacant Employment Lands Inventory March 1997

Planning District	Available Vacant Employment Land ha (Acres)		Expansion Lands ha (Acres)		Total ha (Acres)		% of Total
Airport Corporate	90.8	(224.4)	2.1	(5.2)	92.9	(229.6)	4.6%
Gateway	784.9	(1939.5)	9.3	(23)	794.2	(1962.4)	39.2%
Meadowvale Business Park	348.1	(860.1)	8.6	(21.3)	356.7	(881.4)	17.6%
Churchill Meadows	65	(160.6)	0	(0)	65	(160.6)	3.2%
Dixie	19.7	(48.7)	5	(12.4)	24.7	(61)	1.2%
Mavis Road	4.6	(11.4)	2.3	(5.7)	6.9	(17)	0.3%
Northeast	403.2	(996.3)	38.8	(95.9)	442	(1092.2)	21.8%
Sheridan Park	13.9	(34.3)	12.2	(30.1)	26.1	(64.5)	1.3%
Southdown	91.3	(225.6)	20	(49.4)	111.3	(275)	5.5%
Western Business Park	106	(261.9)	0	(0)	106	(261.9)	5.2%
Dixie Shorefront	1.1	(2.7)	0	(0)	1.1	(2.7)	0.1%
Total	1928.6	(4765.5)	98.3	(242.9)	2026.9	(5008.4)	100%

***NOTE - Does not include employment lands deleted from the Parkway Belt**



Office Market

According to Colliers International, the Metro West office market continued its strong performance in the GTA by absorbing 400,000 square feet of space in the third quarter and 128,000 square feet in the fourth quarter of 1997. This represents a vacancy rate drop from 16.4% to 14.4% in the last half of 1997. The Airport district of this market led the area with a vacancy drop from just under 20% at mid-year to 14.9% at the end of 1997. Conditions in the other submarkets remained unchanged in the fourth quarter except for the Mississauga City Centre where there was a vacancy rate increase of 2.3% to 10.4%. Although, Metro West office market still has the highest vacancy rate in the GTA, the vacancy rate for the end of 1997 is the lowest this decade. The future for this market well likely be a vacancy rate reduction to the low double digits in 1998. The lack of adequate functional space will likely stimulate design-builds for larger tenants.

The Co-Operators Office Building in Airport Corporate

*NOTE - The Metro West area (defined by Colliers International) includes: Airport, Bloor-Islington, Brampton, Burlington, Cooksville, Hwy 427 Corridor, Highway 10 Corridor, Mississauga City Centre, Meadowvale, Oakville, Sheridan.

Areas	Office m2 (sq.ft.)	Office / Retail m2 (sq.ft.)
Northwest	465,312 (5,008,740)	5,827 (62,723)
Northeast	510,904 (5,499,505)	9,076 (97,696)
Central	374,408 (4,030,226)	5,016 (53,994)
Southwest	56,402 (607,126)	—
Southeast	29,848 (321,292)	—
Total	**1,436,874 (15,466,889)**	**19,919 (214,413)**

Office: A building or structure used for the purpose of providing accommodation for offices, which may include accessory retail.

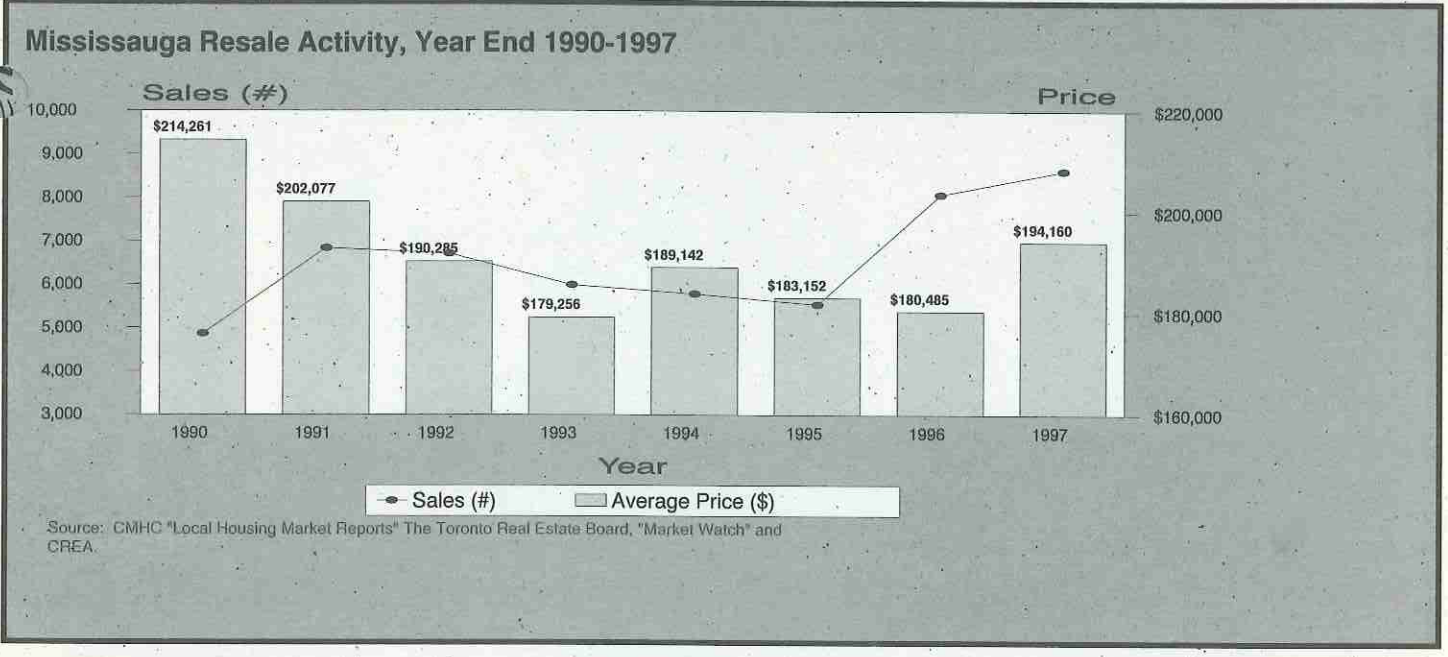
Office / Retail: A building or structure used for the purpose of providing accommodation for offices, and retail uses to a level beyond the accessory use definition.

***Note:** Does not include offices grouped in Industrial Malls and those not meeting the above definitions.

Housing

Mississauga recorded another good year in the housing market with strong activity in the sale of new and resale homes. Mississauga and Brampton tied for the most significant drop in rental vacancies in the Toronto CMA with a decline from 1.7% to 0.7% for all unit types combined. According to CMHC, factors attributing to this decline are strong employment growth, with subsequent migration to the area, and income growth.

Residential building permits in 1997 increased 23%. Single detached homes recorded the most issuances with 2,202 permits, up 32% from 1996. Townhouses jumped by 210% from 286 to 602 permits issued and apartment permits revived from 0 to 54 issuances. Semi-detached homes had the only drop from 875 to 839 permits, a decrease of 4%.



City of Mississauga Vacancy Rates, 3 Units and Over October 1993-1997

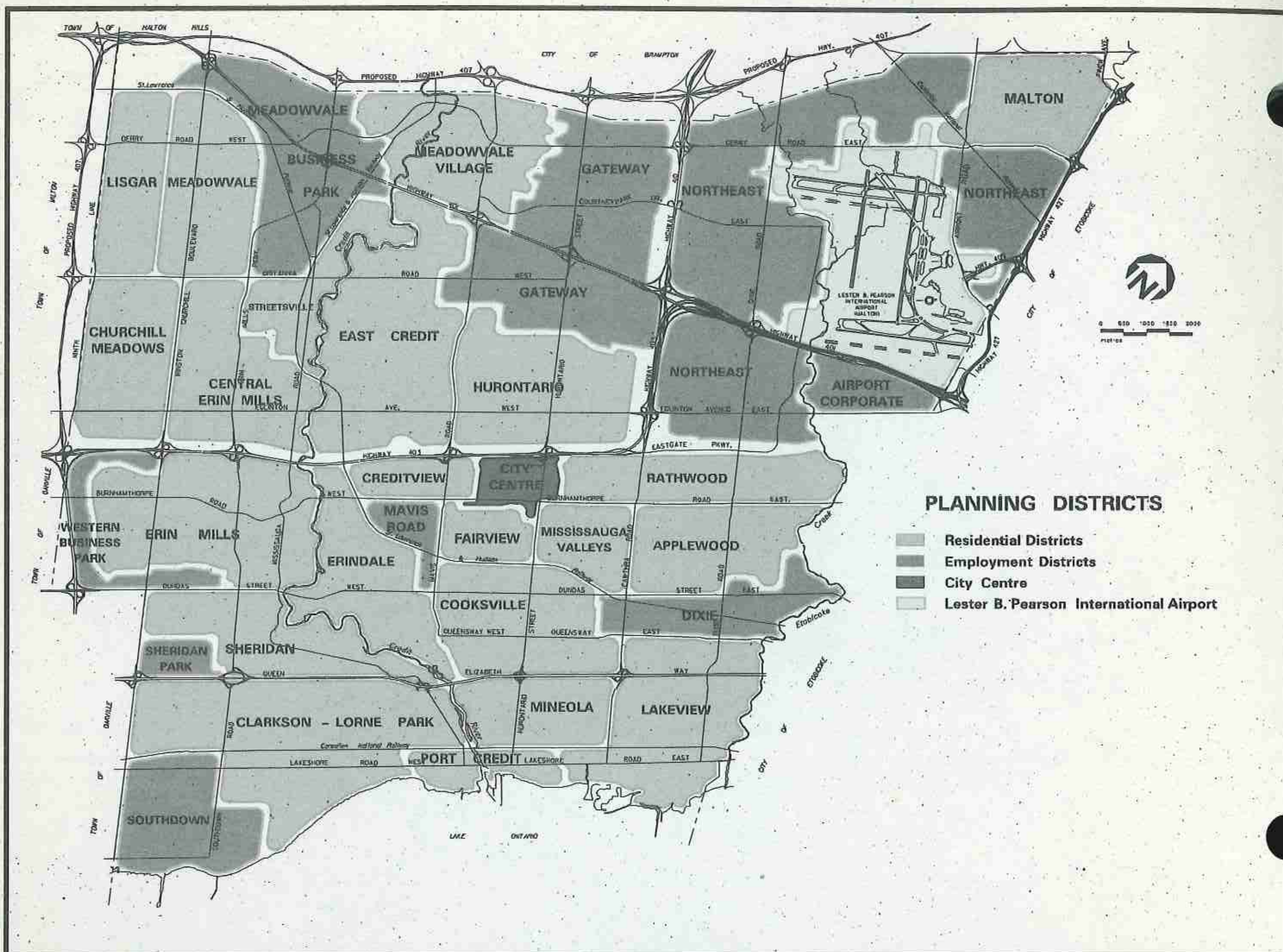
Year	Overall %	Bachelor %	1 Bedroom %	2 Bedroom %	3 Bedroom %
1993	2.2	2.9	2.3	1.9	2.9
1994	1.4	1.3	1.9	2.1	1.7
1995	0.6	1.1	0.6	0.5	0.9
1996	1.7	2.3	1.4	1.8	1.6
1997	0.9	0.8	1.0	0.9	0.8

Source: CMHC Rental Market Report, October, 1993-1997 and The Toronto Real Estate Board, "Market Watch"

Average Rents for the City of Mississauga October 1993-1997

	Year/$				
Unit Type/Area	1993	1994	1995	1996	1997
Bachelor	$544	$551	$563	$578	$589
1 Bedroom	$659	$675	$681	$699	$714
2 Bedroom	$821	$813	$832	$847	$845
3 Bedroom	$882	$894	$906	$914	$910

Source: CMHC Rental Market Report, October, 1993-1997



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ERRATA

Total Building Permit Values for 1997

There has been an error in the building permit values reported by Statistics Canada for Mississauga. The total building permit value reported at 1.5 billion found in the first paragraph and the accompanying chart should read 1.1 billion.