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Economic & Development Review 2004

Economic and Development Review 2004

The Economic and Development Review is a semi-annual report on economic and development activity in the Regional Municipality of York. The information in this document has been compiled from a variety of sources and includes the most current data available at the time of printing. Sources are listed at the end of the report.

The Economic and Development Review 2004 is one of a family of documents available from the York Region Planning and Development Services Department that deals with the Region's economy and its residents. Other publications in the series include: the Economic and Development Review 2003 and mid year 2004 (reports on the economic and development activity in York Region for 2003 and the first half of 2004);

Opportunities for Investment (provides key facts and figures on a variety of indicators to businesses looking to locate in York Region); Employment & Industry 2003 (highlighting Regional employment trends by municipality and industry sector); and York Region's 2004 print Business Directory (provides industry sector, business name, size, address and contact information on thousands of businesses in York Region).

Inquiries about this, and other reports, should be directed to the Planning and Development Services Department at 905-830-4444 ext. 1550 or 1-877-464-9675 ext. 1550.

The report is also available on the York Region web site: www.york.ca

Economic & Development

Review

2004

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Highlights

- York Region's total population was estimated to be 889,600 on December 31, 2004, an increase of approximately 34,600 from December 2003.
- York Region contains 15% of the GTA's population and 14% of its employment population.
- Building permits for 9,306 new residential units were issued in 2004. York Region issued the sixth largest number of new residential permits in the country.
- Housing completions reached 10,679 units in 2004.
- Total construction for 2004 was valued at approximately $2.56 billion.
- Industrial, commercial, institutional (ICI) construction made up 34% of the total construction value in York Region during 2004.
- The total estimated value of industrial construction was $277 million.
- The value of commercial construction was $385 million a 16% increase over 2003.
- The value of institutional construction $203 million.
- The estimated number of jobs as of December 2004 in York Region was approximately 440,000.
- The unemployment rate as of December 2004 in York Region was estimated to be 6.1%.
- Performance in 2005 is being carefully monitored to detect the impact of an ever-changing economy and shifting global geopolitical events on the Regional economy.

Overview

York Region continued to grow at a rapid pace in 2004. By December 2004, the total population of York Region was estimated to be 889,600. This represents an increase of 34,600 persons (4.0%) in 2004 down slightly from the 4.1% growth rate in 2003. York is a major growth area in the Greater Toronto Area, accounting for 16% of the total GTA's population.

Total construction for 2004 was valued at $2.56 billion, a slight decrease from 2003. From January to December 2004 industrial, commercial and institutional (ICI) construction remained strong. The ICI values went down by only 0.8% over the year. Residential construction ($1.69 billion) across the Region in 2004 was 8.7% lower than 2003.

York Region had the fourth highest total residential construction value in Canada for 2004 once again and the sixth highest number of new residential permits issued. Between January and December 2004, 9,306 building permits for new residential units were issued in York Region, an 8% decrease from 2003.

Building permits were issued for over 46,700 new residential units in the GTA in 2004. York Region's share of the permits accounted for 19% of all GTA building permits. Durham Region issued 9%, the Region of Halton issued 11%, the Region of Peel issued 32%, and the City of Toronto issued 29%.

Housing resales remain strong in the Region. The Toronto Real Estate Board recorded sales of nearly 15,000 dwelling units in York Region in 2004. This is a 10% increase over the number of homes sold in 2003. The value of the 2004 resales was $5.4 billion. The Region had 10,221 homes started and 10,679 new houses completed in 2004.

In 2004, the number of jobs in York Region is estimated to have grown by approximately 20,000. There were 440,000 jobs in York Region in December 2004. The number of jobs has increased by more than 110,000 since the 1998 Employment Survey. The unemployment rate in York Region was 6.1% in December 2004.

1. Strong Population Growth

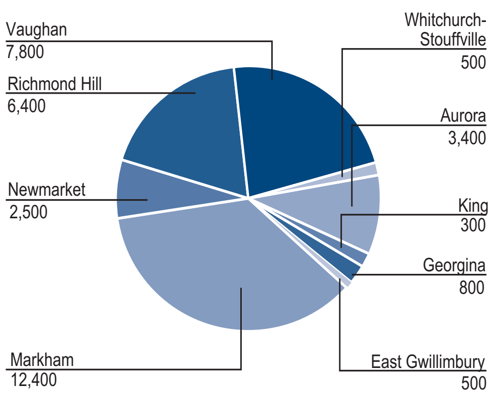
York Region's Population Growth

In the thirty plus years since York Region's creation, its population has grown dramatically. In 1971, the Region's population was 169,000 people. Over thirty years later, on December 31, 2004, the Region's population was an estimated 889,600 (Table 1.1). The year-end population estimate represents an increase of approximately 34,600 persons from December 2003 (Figure 1.1). By comparison, population growth during 2003 totalled approximately 34,500 people.

Although all municipalities in York Region are growing (Figure 1.2), the largest population increase is concentrated in the southern urban half of the Region. The Town of Markham experienced the largest population growth (12,400 people), followed by the City of Vaughan (7,800 people) and the Town of Richmond Hill (6,400 people) (Figure1.3).

York Region Population Increase 2004

(FIGURE 1.3)



Source: York Region Planning and Development Services Department, 2004.

Historically, the highest average annual growth rate experienced in York Region was 7.6%, which occurred over the five-year period from 1986-1991. The recession of the early 1990s triggered a sharp decline in the Region's average annual growth rate. It dropped to a low of 3.3% between 1991 and 1996. Spurred by improving economic conditions, the average annual growth rate increased to 4.4% for the 1996 to 2001 period. Between 2000-2002, the Region grew at an average annual growth rate of over 5.0% (adding approximately 40,000 people per year). In 2002, the Region's population grew at a rate of 5.3% (42,000 people). The Region's 2003 and 2004 growth rate was 4.1 and 4.0%.

York Region Population 2003 - 2004

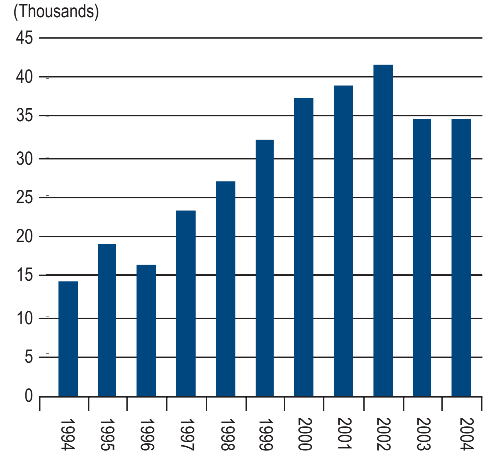
(TABLE 1.1)

	2003	2004	Increase in Persons	Change (%)
Aurora	44,700	48,100	3,400	7.6
East Gwillimbury	21,500	22,000	500	2.3
Georgina	43,300	44,100	800	1.8
King	19,700	20,000	300	1.5
Markham	245,000	257,400	12,400	5.1
Newmarket	72,600	75,100	2,500	3.4
Richmond Hill	156,400	162,800	6,400	4.1
Vaughan	227,500	235,300	7,800	3.4
Whitchurch-Stouffville	24,000	24,500	500	2.1
York Region Total	**855,000**	**889,600**	**34,600**	**4.0**

Source: York Region Planning and Development Services Department, 2004.
Note: Data in this report has been rounded up and therefore some totals may be affected

York Region Annual Population Growth 1994-2004

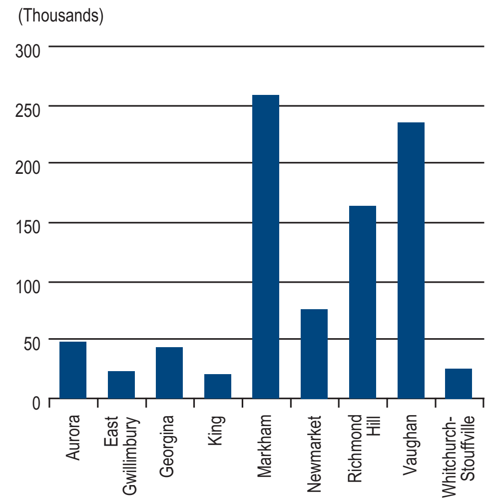
(FIGURE 1.1)



Source: York Region Planning and Development Services Department, 2004.

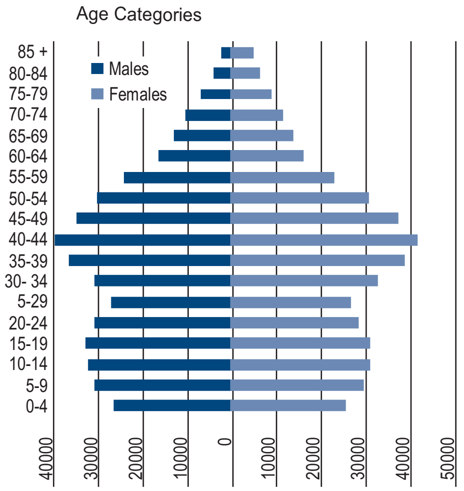
York Region Population 2004

(FIGURE 1.2)



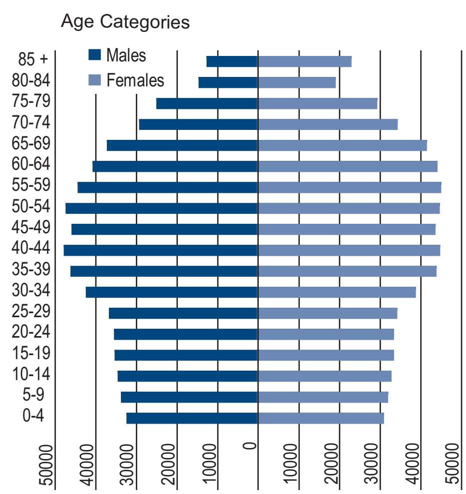
Source: York Region Planning and Development Services Department, 2004.

York Region 2003 Age and Gender Composition
(FIGURE 1.4a)



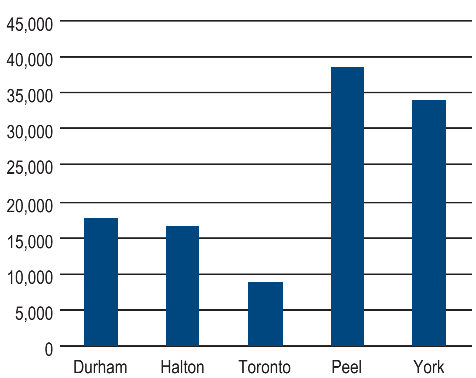
Source: York Region Planning & Development Services Department and Statistics Canada Annual Demographics Statistics.

York Region 2026 Age and Gender Composition
(FIGURE 1.4b)



Source: York Region Planning & Development Services Department and Statistics Canada Annual Demographics Statistics.

GTA Population Change 2004
(FIGURE 1.5)



Source: York Region Planning and Development Services Department, 2004.

Demographics of York Region's Population

As the Region's population continues to grow, the age, social, economic and ethnic composition in York Region will continue to diversify. Relative to the GTA and Canada, the Region in 2003 (most current data) has a "younger" population (Table 1.2). This is primarily due to the large proportion of the population between the ages of 37 and 56 years of age. These "baby boomers" make up 32.9% of the Region's population. By comparison, only 30.8% of the GTA population and 31.0% of the Canadian population are in this age bracket. Only 9.2% of York Region's population falls into the over 65 age bracket, while both the GTA and Canada have higher proportions at 11.0% and 12.8% respectively.

By 2026, York Region's large proportion of ageing baby boomers will contribute to a substantial increase in the senior's population. It is expected that by 2026, the senior's population will increase four times over 2001 levels.

Canada Mortgage and Housing Corporation (CMHC) identify changes in the age make-up of the population as a factor behind an increasing variety of Canadian household types. Ageing contributes to increases in single-person households and childless couples. Over the next ten years, as the oldest "baby boomers" move into the pre-senior and seniors age brackets (Figure 1.4a and 1.4b), their housing choices will exert considerable influence on the housing market (CMHC). As well, this will have critical, long term effects on the demand for all services including health, community and social services.

Increasing diversity is a key characteristic of York Region's population. It is expected that by 2026, York Region will see a significant increase in its numbers of seniors, as well as continuing diversification of incomes and household types.

Age Groups For York Region, the GTA and Canada 2003
(TABLE 1.2)

	% of Population York Region	GTA	Canada
The Future Born 1996 - 2003 (0-7)	10.2	9.9	9.0
Baby Boom Echo Born 1980 - 1995 (8-23)	23.1	20.9	21.5
Baby Bust Born 1967 - 1979 (24-36)	18.1	20.8	18.0
Baby Boom Born 1947 - 1966 (37-56)	32.9	30.8	31.0
Pre-Seniors Born 1936 - 1946 (57-64)	6.5	6.7	7.6
Seniors Born before 1935 (65+)	9.2	11.0	12.8

Source: York Region Planning and Development Services Department, based on Statistics Canada Annual Demographic Statistics 2003 data.

York Region in the GTA

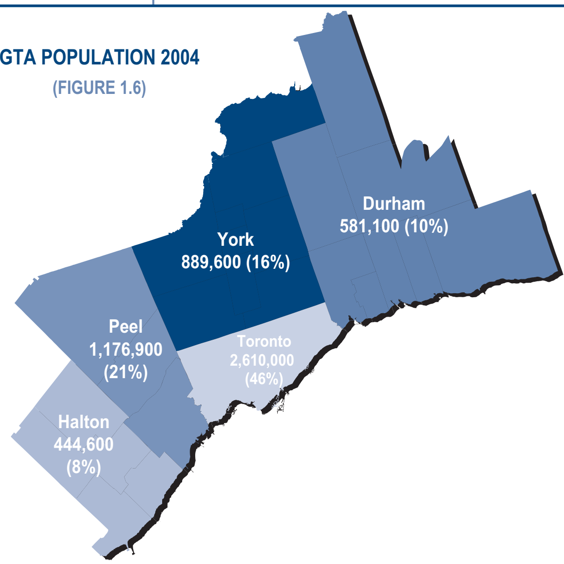
York Region's rapid population growth is due, in part, to its proximity to the City of Toronto. Benefiting from an excellent transportation network, a high quality of life, a vibrant diversified economy and available serviced land, York Region has become a major growth area in the Greater Toronto Area (GTA) (Figure 1.5).

As of December 31, 2004, the GTA's population was estimated to be 5.7 million. This is an increase of 109,250 (2.1%) people since December 2003. Between 1996 and 2001 the GTA added approximately 500,000 people to its population. As Figure 1.6 illustrates, York Region's proportion of the total GTA population was 16% in December 2004, making York Region the third most populace Region in the GTA.

In 2004, York Region accounted for 31.6% of the GTA's population growth. Durham had 15.8%, Halton had 15.0%, Peel had 35.7%, and Toronto had 1.9% of the population increase. Therefore York Region had the second highest share of growth in the GTA.

GTA POPULATION 2004

(FIGURE 1.6)



Source: York Region Planning and Development Services, 2004.

York Region in Canada

A national comparison of the population for Canadian cities, Regions, and Regional Districts indicates that, as of December 2004, York Region was the sixth largest municipality in Canada in terms of its population (Table 1.3).

Canada's Largest Municipalities 2004

(TABLE 1.3)

Rank	Municipality	Population
1	City of Toronto	2,610,000
2	Greater Vancouver Regional District	2,132,800
3	City of Montreal	1,877,200
4	Peel Region	1,176,900
5	City of Calgary	933,500
6	**York Region**	**889,600**
7	City of Ottawa	846,000
8	City of Edmonton	707,300
9	City of Winnipeg	648,300
10	City of Quebec	528,700

Source: York Region Planning and Development Services Department 2004.

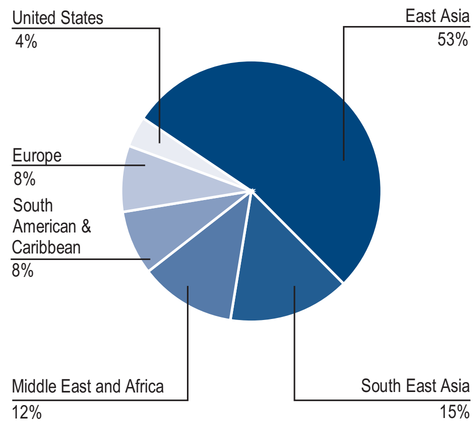
Migration

Immigrant arrival statistics include only new Canadians who moved directly to selected cities in Ontario (primary migration) and does not include those people who originally resided in other Canadian cities before moving to York Region (secondary migration). According to the Catholic Community Services, over a period of eight years (1993-2001), primary migration from East Asia to York Region was the highest (Figure 1.7a).

Citizenship and Immigration Canada statistics show that the pattern for 2004 was different. Asian (east, south and south-east) countries accounted for a combined 50% of primary immigrants to York Region in 2004 (Figure 1.7b). Immigrants from the Middle East and Africa made up 25% of this year's total.

York Region Immigrant Arrival 1993 - 2001

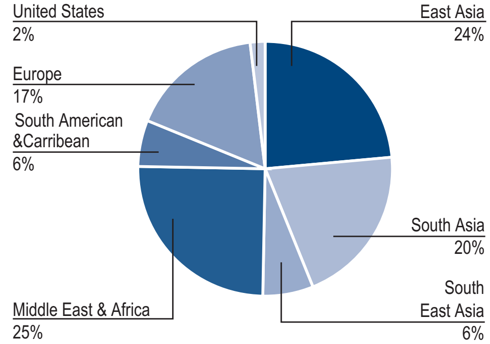
(FIGURE 1.7a)



Source: Citizenship & Immigration Canada, Catholic Community Services of York Region, 2001.

York Region Immigrant Arrival, 2004

(FIGURE 1.7b)



Source: Citizenship and Immigration Canada, 2004.

2. Economic Activities Positive

Provincial, National & North American Context

Considering the number and magnitude of shocks that hit the Canadian economy in 2003 - SARS, BSE, the stronger Canadian dollar, massive forest fires in the west, a hurricane in the Maritimes, a power blackout in Ontario - 2004 was a time of recovery. According to Statistics Canada "Real gross domestic product advanced 2.8% in 2004, an acceleration from the 2.0% growth in the previous year. Exports rebounded despite remarkable strength in the Canadian dollar, and strong growth in final domestic demand was sustained.

The Canadian dollar continued to strengthen against US currency, appreciating 7.7% on top of a 12.1% gain in 2003. While exports increased 4.9%, imports picked up speed, growing a much stronger 8.2%, leading to a significant decline in Canada's trade balance.

Corporate surpluses burgeoned as profits skyrocketed (+17.7%). Businesses took advantage of the strong dollar to invest in machinery and equipment, with purchases surging 9.4% in 2004, in tandem with rising imports.

Industrial production increased 3.2% after a lacklustre 0.7% performance in the previous year. Manufacturers boosted production 3.9% after a flat 2003, with gains spanning a range of categories. Wholesale and retail trade activity posted solid gains, and the finance and insurance industries had a bright year. Mining and oil and gas extraction output grew 2.7%, boosted by increased production of potash, diamonds, coal and certain metals. Oil and gas exploration continued to expand after the surge in 2003, triggered by high energy prices.

Despite strong growth in labour income, personal saving continued to decline, as growth in spending outstripped income growth. The saving rate fell to the lowest level on record since the 1930s. With sustained robust growth in residential construction, personal sector net borrowing continued to climb" (Statistics Canada, Year-end Review, February 2005).

With most situations returning to normal in 2004 after the slowdown of 2003, Ontario's economy was recovering gradually. A rebound in manufacturing fostered a moderate improvement in Ontario's economy despite the earlier rise in the Canadian dollar.

In 2004, Ontario employment grew by 108,000 new jobs, up by 1.7 % from 2003. All the new jobs were full-time as part-time employment declined. This accounted for 38% of all job creation in Canada.

According to CB Richard Ellis Limited Market Outlook 2005, "the economy in the Greater Toronto Area (GTA) expanded by 5% in 2004. This growth was fuelled by a combination of new housing starts, which numbered approximately 41,000, and continued gains in employment. The rising Canadian dollar did not impede the manufacturing sector as anticipated, as both U.S. and Canadian consumers continued to spend. The outlook for the economy in 2005 is mixed; GDP will grow by 2.3% (Conference Board of Canada) but U.S. consumers are nearing their debt limits, and the expectation of slightly higher interest rates will curtail spending. On the corporate side, capital expenditure is expected to increase slightly as companies seek to increase productivity and maximize profits through updated technology."

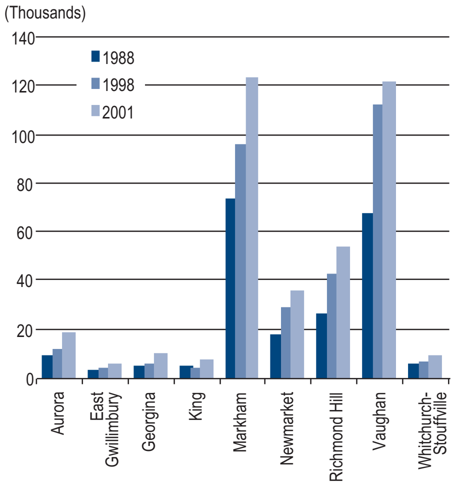
The strong Canadian loonie also effected the GTA's economy, as high Canadian dollar made Canadian manufactured exports less appealing to American (and global) consumers. However, low interest rates, a strong housing market and a strong population growth rate continued to stimulate the GTA market in 2004 and produced solid employment gains in 2004. Output in the manufacturing sector was another stimulus as automakers increased production and replenished their inventory levels (Ontario Ministry of Finance, Ontario Economic Update, Februrary 2005).

York Region has not been immune to the effects of a slower Canadian and U.S. economy, but it continues to grow. In 2004 the Region witnessed continued job growth and higher levels of non-residential construction. York Region's strong and diversified economy has been a key factor in helping it withstand the uncertainty that surrounds the direction of the Canadian and U.S. economies. As such, the prospects for healthy, sustainable economic growth remain for 2005.

Overall, the economic indicators for York Region, the Greater Toronto Area, Ontario and Canada as a whole appear positive for 2005. It is anticipated that Canada will continue to witness improved economic performance with 2.3% GDP growth in 2005 and 2.8% in 2006 (Conference Board of Canada).

Number of Employees in York Region 1988, 1998 & 2001

(FIGURE 2.1)



Source: York Region Planning and Development Services Department, 2001.

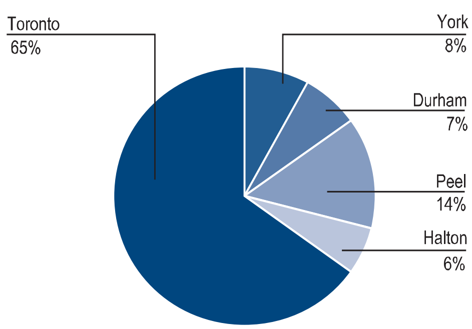
Employment Growth

In spite of the economic slowdown in many sectors of the economy, the number of jobs in York Region is estimated to have grown by approximately 20,000 jobs in 2004. With approximately 440,000 jobs in York Region, the number of jobs has increased by 110,000 since the 1998 Employment Survey (Figure 2.1). In the past five years, growth has been particularly strong in the business service and retail sectors. There are now an estimated 27,000 businesses in York Region (2004).

The Region is forecasted to have approximately 696,000 jobs in 2026. Since 1971, York Region's employment growth has increased at a higher rate than its population growth. This is an indication of the strength of the Region's rapidly expanding economy. For the five year period between 1996 and 2001, employment growth is estimated to have been 6.1% while population growth is estimated to have been 4.8%. As the Region's employment increased, its share of the GTA's employment also increased. In 1986, York Region accounted for 8% of all the jobs in the GTA (Figure 2.2a). In 2001 that percentage grew to 14% (Figure 2.2b). It is interesting to note that York Region's proportion of the total GTA employment at 14% is roughly equivalent to York's proportion of the total GTA population.

York Region's Share of GTA Employment 1986

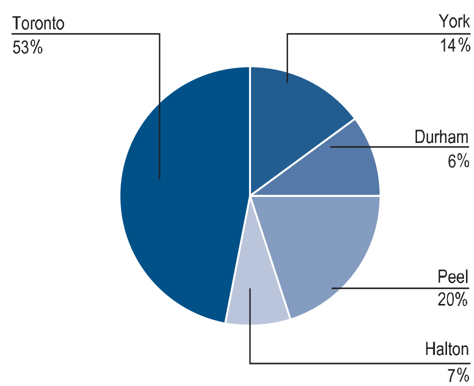
(FIGURE 2.2a)



Source: York Region Planning and Development Services Department, 2002.

York Region's Share of GTA Employment 2001

(FIGURE 2.2b)



Source: York Region Planning and Development Services Department, 2003.

Small Business in York Region

Small firms are the predominant form of enterprise in York Region. While the Region is host to a number of large international firms, over 93% of the firms employ less than 20 people in 2003. Enterprises without payroll employees accounted for over 60% of the total. This large proportion of small firms and enterprises without payroll employees reflect the entrepreneurial nature of the Region's growing population. These small firms contribute to a diversified and innovative economy, which helps to stabilize the Region from cyclical shifts in the national and global economies. For this reason, one of the Strategic Directions of the Regional Economic Strategy is to continue to strengthen entrepreneurship and support small business development.

Top Private Sector Employers

As of December 2004, there were approximately 39 private sector companies in York Region with 500 or more employees. In 1996, there were only 18 private sector employers with 500 or more employees. Table 2.1 shows the summary of the largest private sector employers in the Region. The list shows the broad diversity of sectors including manufacturing, financial services, transportation and commerce. In addition, there are a number of public sector employers with more than 500 employees in the Region which are not included in the table. These are Markham Stouffville Hospital, York Central Hospital, Southlake Regional Health Centre and York Region Board of Education, to mention a few.

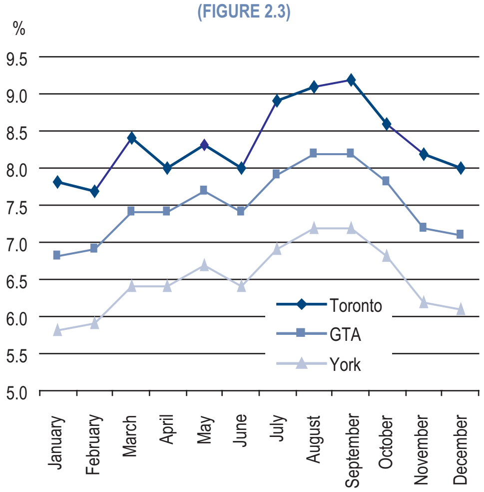
Top Employers in York Region, 2004

(TABLE 2.1)

Rank	Company	Location	No. of Emp.	Industry Type
1	Magna International Inc.	York Region	13,397*	Manufactures automotive components & systems
2	IBM Canada Ltd.	Markham	7,133	Provides information technology solutions
3	Paramount Canada's Wonderland	Vaughan	4,150**	Theme Park
4	Royal Group Technologies Ltd.	Vaughan	3,800	Manufactures polymer based home improvement, consumer & construction products
5	Amex Canada	Markham	3,000	Financial services & call centre
6	Acklands-Grainger	Richmond Hill	2,332	Trucking company
7	ATI Technologies Inc.	Markham	1,740	Designs & manufactures innovative 3D graphics solutions
8	The Miller Group	Markham	1,700	Road construction engineering services, paving, & manufacture asphalt
9	Con Drain Company Ltd.	Vaughan	1,350	Sewer & water main contractors
10	Canadian National Railway	Vaughan	1,300	Rail based transportation & real estate services
11	Sears Canada National Service Centre	Vaughan	1,200	Distribution centre and warehouse for Sears retail stores
12	Quebecor World	Richmond Hill, Aurora, Vaughan	1,156	Commercial printer/publisher
13	Progressive Moulded Products Ltd.	Vaughan	1,024	Manufactures custom injection moulds for automobiles & appliances
14	CGI Information Systems & Management Consultants Inc	Markham	1,000	Independent adjusters for insurance claims
15	Canac Kitchens	Markham	1,000	Manufactures kitchen cabinets & counters
16	Panigas Group of Companies	Vaughan	960	General contractor, manufacturing signage & exhibits
17	Hewlett Packard (Canada) Ltd.	Markham	900	Computer sales, service & corporate administration
18	A.C. Nielsen of Canada Ltd.	Markham	850	Market research
19	Highland Transport	Markham	775	Trucking company
20	Steelcase Canada Ltd.	Markham	750	Manufactures office furniture
21	Nova Services Group Inc	Vaughan	720	Janitorial services contractor
22	Noma Automotive	Vaughan	700	Manufactures wiring products for vehicles & appliances
23	407 ETR	Vaughan	682	Administration & Maintenance of Highway 407
24	Allstate Insurance	Markham	650	Insurance carrier
25	Novex Pharma	Richmond Hill	650	Pharmaceutical company
26	Toromont Industries Ltd.	Vaughan	621	Distributes & services heavy construction equipment & engines
27	Scholastic Canada Ltd	Markham	600	Publishes & distributes children's books & educational materials in both official languages
28	Crown Metal Packaging Canada Inc.	Vaughan	580	Manufacutures metal containers
29	Exco Technologies Ltd.	Markham	550	Manufactures die-cast moulds & extrusion tooling
30	The Toronto Star Press Centre	Vaughan	530	Newspaper printing centre
31	Emerson Electric Canada	Markham	525	Manufactures climate control systems, tools, appliances & industrial automation systems
32	Robert B. Somerville	King	525	Pipeline & utility installation contractors
33	Maritime Life Insurance Company	Markham	520	Insurance carrier
34	Waterford Building Maintenance Inc	Markham	510	Janitorial services contractor
35	Woodbridge Foam Corp.	Vaughan	510	Manufactures automotive polyurethane foam components
36	Omega Direct Response	Markham	500	Call center services company
37	The Linkage Group Inc	Markham	500	Sales and merchandising services
38	Grand & Toy Ltd.	Vaughan	500	Warehouse office supplies for retail stores
39	MDS Sciex	Vaughan	500	Involved in research, design & production of mass spectrometers

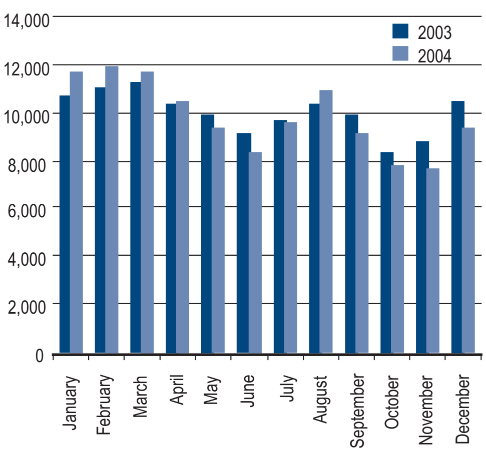
Note: * Includes employees of subsidiary companies located in York Region. This table represents private-sector employers with 500 or more employees working in York Region.
**This includes seasonal employees.
Source: York Region Planning and Development Services Department, 2004.

Unemployment Rates 2004
(FIGURE 2.3)



Source: Toronto Economic Development Division, Toronto Economic Indicators, 2004.
York Region unemployment figures are estimates.

Employment Insurance Claims in York Region 2003-2004
(FIGURE 2.4)



Source: Human Resources Development Canada, 2003 and 2004.

Labour Market Conditions

Unemployment Rate

Following a slow start early in the year, employment picked up momentum in the second quarter and over the last four months of 2004. According to Statistics Canada, overall employment gains for the year were 228,000 (+1.4%), slightly lower than in 2003 when employment grew by 1.8%. All of the employment gains in 2004 were in full-time jobs. Canada's December 2004 unemployment rate at 6.7 % was down slightly from the rate recorded in December 2003 (7.0%).

Manufacturing in Ontario rose slightly despite gains in the value of the Canadian dollar compared to the U.S. dollar. Ontario's December unemployment rate remained the same from December 2003 to December 2004 at 6.2%. Toronto's unemployment rate increased slightly to 8.0% in 2004 from 7.6% in 2003. The GTA unemployment rate also increased from the 6.2% in 2004 from 7.1% in 2003.

Human Resources Development Canada estimates put York Region's unemployment rate at 1.0-2.0% lower than the GTA's unemployment rate (Figure 2.3). Thus, York Region's unemployment rate in December 2004 was approximately 6.1%, slightly higher than in December 2003 (5.7%). York Region figures are general estimates based on HRDC and Statistics Canada figures and are not seasonally adjusted.

York Region's low unemployment rate may be viewed as an indication of a strong and diverse economy better able to withstand economic downturns.

Employment Insurance

In 2004, York Region's Human Resources Development Canada Centres received 117,500 Employment Insurance claims (Figure 2.4). This number is lower than the number of claims that were received in 2003 (119,000). Over 2004, the number of workers on Employment Insurance ranged from a high of 11,870 in February, to a low of 7,776 in October. The average number of workers on Employment Insurance during 2004 was 9,796 per month. By comparison the monthly average for claims was 9,928, in 2003.

Ontario Works

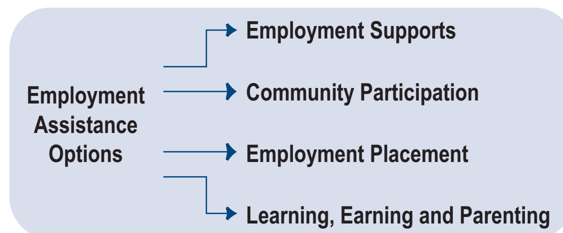
The Community Services and Housing Department's Social Assistance Division delivers Ontario Works (employment assistance and financial assistance) for eligible residents in the nine municipalities of York Region.

Financial assistance eligibility is determined through an eligibility assessment mandated by the Ontario Works Act. The majority of recipients are required to participate in one or more employment assistance activities as a condition of eligibility for financial assistance. Exceptions apply to disabled individuals, seniors over 65 years, and individuals caring for young children.

Ontario Works provides four types of employment assistance to help individuals achieve financial independence:

Employment Supports

The Employment Supports program helps individuals to develop action plans so that they can become financially independent. An individual's action plan can include basic education, training, independent or structured job searches, use of available York Region resource centres, and access to funding to assist with transportation, clothing, training, or child care costs.



- From January to December of 2004, an average of 4,928 individuals were assisted each month through the Employment Supports program.
- Approximately 878 individuals who received assistance through Employment Supports in conjunction with Community Placement; and Employment Placement program supports have found paid employment.
- Since January 1998, 7,288 individuals have found paid employment through York Region's Ontario Works employment programs.

Community Participation

Community Participation gives Ontario Works participants opportunities to volunteer with non-profit organizations, service clubs, or public sector organizations to build new employment skills or to update current skills.

- From January to December of 2004, 269 placement organizations created opportunities and 1,147 participants took part in community participation activities.
- Since the beginning of the Community Participation in 1998, program volunteer participants have contributed approximately 242,345 hours of volunteer work to their communities.

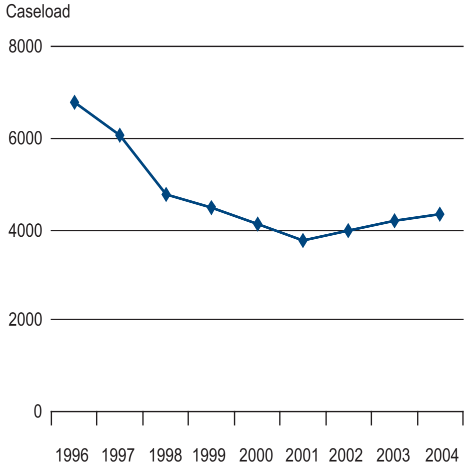
Employment Placement

Working in conjunction with the Employment Supports program options, the Employment Placement program links individuals, many of whom have developed their skills through training and volunteering, to paid job opportunities in the community.

- In 2004, 333 job ready individuals were linked to paid job opportunities through this targeted job matching program.

Social Assistance Average Monthly Caseload (1996-2004)

(FIGURE 2.5)



Source: York Region Community Services and Housing Department, 2004.

Learning, Earning and Parenting Program (LEAP)

The Learning, Earning and Parenting Program (LEAP) was introduced to York Region in December of 1999. LEAP is designed to encourage young parents (aged 16 to 21) to complete their high school education, learn about child development, acquire parenting skills, and develop employment skills. Additional financial supports are made available to the parents based on an individual service plan.

- 58 young parents participated in LEAP during 2004.

Social Assistance Caseload

York Region's social assistance caseload has remained relatively stable since 1999 (Figure 2.5). The caseload declined from 1995 through 1999, consistent with the Region's economic recovery. The Province's download of sole-support parent cases to municipalities in 1999 impacted the social assistance caseload for subsequent years. In 2004, the social assistance caseload averaged 4,304 cases (households) per month. These cases were comprised of over 8,300 individual beneficiaries (including spouses and children).

Average monthly caseloads are projected to increase slightly through 2005 and 2006.

3. Property Market

Residential Property

The year 2004 set new records in home sales, average price, new listings and was the best year for housing starts across Canada since 1987 according to the RBC Economics latest Housing Affordability Index.

York Region's resale market was quite strong in 2004 and the average price of residential dwellings was up significantly reaching a year-end total of $315,231 (all dwelling types for the entire GTA). The Toronto Real Estate Board (TREB) reported 83,501 sales in 2004. This figure is up about 6% from the previous record 78,898 level set in 2003. According to Toronto Real Estate Board (TREB) President Ron Abraham, "2004 was the best year for sales ever recorded."

According to CIBC World Markets, "the strong dollar kept interest rates low last year and that, in turn, helped boost record high real estate prices."

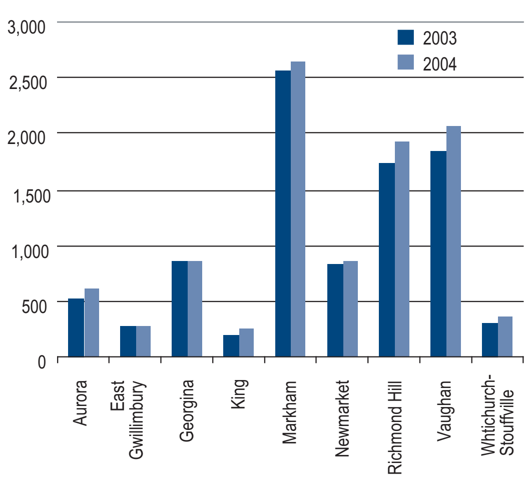
RBC Royal Bank, commenting on the home buying intent of people in the GTA in 2005, sees the level of interest home purchase even higher than in 2004. Low interest rates, flexible payment plans, rising household incomes and continued affordability are credited with the flurry of activity.

Scotia Economics also notes that part of the rise in homeownership reflects the aging of the population. Homeownership rates have been increasing steadily over the past three decades as Canada's large "baby boom" generation made the transition from renters to owners. The "boomers ", today in their 40s and 50s are now in their prime homeowning years (Scotiabank Group, March 2005).

According to the Toronto Real Estate Board's Market Watch Report, York Region sales for 2004 were 6.0% higher than 2003 (Figure 3.2). From January to December 2004, the resales of residential units in York Region totalled 14,935 dwelling units (Figure 3.1) with a value of $5.4 billion. This was an increase from the 13,573 housing units (with a value of $4.5 billion) sold in 2003.

Total Number of Resales of Detached Dwellings in York Region 2003 and 2004

(FIGURE 3.2)

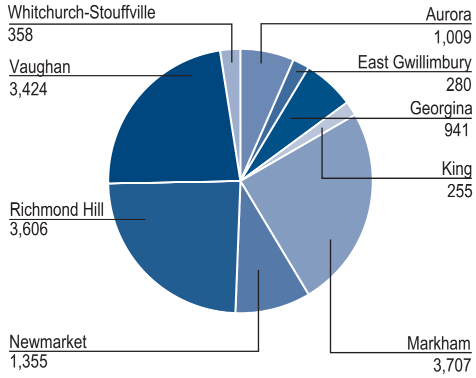


Source: Toronto Real Estate Board, Market Watch, 2003 and 2004.

In 2004, the average price of single family residential detached dwelling unit increased to $407,896 (Table 3.1). By comparison, the average price of a single family home in York Region in 2003 was $378,037 (increased 7.9% in 2004). The average price of the multi-family units varied between municipalities. The increase in house prices occurred across the range of dwelling types that were sold in York Region. The average house price (for all dwelling types) was 14% higher in York Region ($359,753) than in the GTA ($315,231).

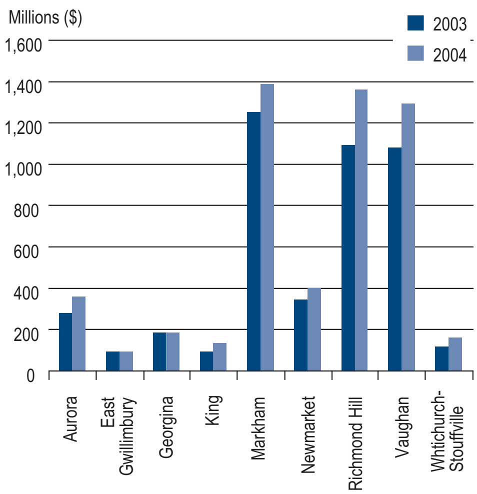
Total Residential Resales of all Dwelling Types, 2004

(FIGURE 3.1)



Source: Toronto Real Estate Board, Market Watch, 2004.

Total Value of Resales in York Region, 2003 - 2004
All Dwelling Types
(FIGURE 3.3)



Source: Toronto Real Estate Board, Market Watch, 2003 and 2004.

From January to December 2004, resales in York Region made up 20.0% of the total sales in the GTA (by $ volume). The Region's share of the total sales in the GTA in 2004 is higher than it was in 2003 (19.8%). The number and value of residential sales were consistently higher than they were in 2003 (Table 3.1). The average price reflected the price of the homes that were actually sold in this period (not the assessed value of housing in each community).

Total Number of Resales and Average Price of Single Family Detached Dwellings by Area Municipality 2003 & 2004

(TABLE 3.1)

	Sales		Average Price	
	2003	2004	2003	2004
Aurora	511	608	388,554	430,410
East Gwillimbury	264	268	320,967	350,661
Georgina	857	844	205,836	201,102
King	206	252	484,607	526,607
Markham	2,565	2,633	389,203	413,389
Newmarket	827	849	310,294	333,606
Richmond Hill	1,733	1,924	437,024	464,751
Vaughan	1,853	2,067	405,649	439,045
Whitchurch-Stouffville	305	347	408,551	468,728
York Region Total	**9,121**	**9,792**	**378,037**	**407,896**

Source: Toronto Real Estate Board, Market Watch 2003 and 2004.

The Toronto Real Estate Board reports that the resale of multi-family units in York Region is up 15.5% from last year (based on the number of units). Multi-family dwellings include semi-detached, townhouse condominiums, condominium apartments, and attached row houses. In 2004, 5,143 multi-family units were sold. By comparison, for the same time period in 2003, 4,452 multi-family units were sold in the Region. Multi-family units were popular with first time buyers at this time of continued low interest because of some units' lower selling price.

Table 3.2 outlines the number of resales and average prices of homes for each area municipality in York Region. In total, as shown in Figure 3.3, 2004 has been another strong year in home resales in York Region with approximately $5.4 billion of real estate transactions occurring.

The Toronto Real Estate Board reported that the average number of days that a residential dwelling was on the market in York Region to 36 days in 2004. The Board also reported that properties were sold at 97% of their listed prices.

York Region Resales & Average Prices All Dwelling Types, 2004

(TABLE 3.2)

	Detached		Semi		Town/Row/Attach		Condo/Apt	
	Sales	Price	Sales	Price	Sales	Price	Sales	Price
Aurora	608	430,410	132	256,363	242	255,173	27	204,715
East Gwillimbury	268	350,661	0	0	11	206,473	1	142,000
Georgina	844	201,102	30	207,427	61	179,503	6	97,333
King	252	526,607	2	264,000	1	242,000	0	0
Markham	2,633	413,389	237	294,511	583	275,830	254	252,590
Newmarket	849	333,606	187	234,191	250	221,705	69	188,375
Richmond Hill	1,924	464,751	254	409,706	805	295,605	623	194,630
Vaughan	2,067	439,045	418	309,649	637	287,328	302	237,378
Whitchurch-Stouffville	347	468,728	3	240,733	8	199,113	0	0
York Region Total	**9,792**	**407,896**	**1,263**	**307,525**	**2,598**	**274,839**	**1,282**	**215,563**

Source: Toronto Real Estate Board, Market Watch, 2004.

York Region Resales & Average Prices 2003 & 2004
($000's)

(TABLE 3.3)

Standard Condominium Apt.	2003	2004
Markham	260	260
Richmond Hill	n.a.	225
Thornhill	215	235
Unionville	295	295
Woodbridge	229	263

Standard Two-Storey	2003	2004
Markham	355	358
Richmond Hill	n.a.	290
Thornhill	315	340
Unionville	380	388
Woodbridge	357	350

Luxury Condominium Apt.	2003	2004
Markham	320	320
Richmond Hill	n.a.	230
Thornhill	260	275
Unionville	355	355
Woodbridge	289	272

Executive Detached Two-Storey	2003	2004
Markham	390	395
Richmond Hill	n.a.	355
Thornhill	400	440
Unionville	430	435
Woodbridge	422	439

Standard Townhouse	2003	2004
Markham	225	245
Richmond Hill	n.a.	225
Thornhill	210	225
Unionville	285	290
Woodbridge	225	263

Senior Executive	2003	2004
Markham	430	465
Richmond Hill	n.a.	410
Thornhill	500	535
Unionville	545	565
Woodbridge	581	550

Detached Bungalow	2003	2004
Markham	335	352
Richmond Hill	n.a.	290
Thornhill	375	425
Unionville	390	402
Woodbridge	389	384

Source: Royal LePage, Survey of Canadian House Prices, 2003 and 2004.
n.a.: Figures no longer available from Royal LePage.

Detached Bungalow: A single storey 3-bedroom home with a full basement and a house area of 111 sq. metres (1,200 sq. ft.) situated on a 511 sq. metre (5,500 sq. ft.) lot.
Executive Detached Two Storey: A 4-bedroom home with a full basement and a house area of 186 sq. metres (2,000 sq. ft.) situated on a 604 sq. metre (6,500 sq. ft.) lot.
Standard Two Storey: A 3-bedroom home with a full basement and a house area of 139 sq. metres (1,500 sq. ft.) situated on a 325 sq. metre (3,500 sq. ft.) lot.
Standard Townhouse: A 3-bedroom condominium or freehold home with a full unfinished basement and an inside area of 92 sq. metres(1,000 sq. ft.).
Senior Executive: A two storey 4 or 5 bedroom home with a full unfinished basement and a house area of 279+ sq. metres (3,000 sq. ft.) situated on a 627 sq. metres (6,750 sq. ft.) lot.
Standard Condominium Apt.: A 2-bedroom unit in a high rise with an inside floor area of 84 sq. metres (900 sq. ft.).
Luxury Condominium Apt.: A 2-bedroom unit in a high rise with an inside floor area of 130 sq. metres (1,400 sq. ft.).

York Region Range of Industrial Land Prices ($'000 Per Acre) 2001-2003

(TABLE 3.4)

	Price Range
Aurora	195 - 320
East Gwillimbury	55 - 90
Georgina	50 - 100
King	60 - 120
Markham	400 - 500*
Newmarket	350 - 500
Richmond Hill	400 - 500*
Vaughan	400 - 500*
Whitchurch - Stouffville	110 - 250

Source: Planning and Development Department 2003 and Royal LePage, 2002 and *Collier International 2003.
Based on 2-5 acre parcels zoned and serviced.

Industrial & Commercial Property Market

Industrial Land

The GTA industrial market, with almost 700 million square feet of inventory (the third largest in North America), is favourably located to serve major Canadian and U.S. markets. Due to the close integration of the Canadian and American economies it is not surprising that the Canadian industrial sector has been mirroring trends in the U.S. industrial markets.

In 2004, a record volume of industrial land was sold in the Greater Toronto Area. Dollar values were the highest annual total of the last eight years. The eight-year high in sales reflects the Toronto industrial market's current building boom, which began earlier in the year and will continue into 2005.

The lack of prime development parcels in prestige parks has exerted upward pressure on pricing. Rising land prices have forced developers to look beyond traditional nodes for development parcels (Colliers International Year-End 2004).

Industrial Buildings

Royal LePage tracks the industrial market in five of the nine municipalities in York Region including Aurora, Markham, Newmarket, Richmond Hill and Vaughan. According to Royal LePage, in the last quarter of 2004 the average lease rate for industrial buildings in these municipalities was $6.15 per square foot. By comparison, in the last quarter of 2003 the average lease rate was $6.09 per square foot (Figure 3.4). The market forces of location and product quality determine lease rates and sale prices. A trend across all major industrial markets was the "lease versus purchase scenario" which continues to result in increased rental activity and a shortage of buildings for sale therefore, higher sale prices. Industrial sale prices per square foot ranged from $78.07 in the first quarter of 2004 to $76.27 by year end. In York Region the industrial vacancy rate was 4.4% in December 2004.

The Region's overall industrial vacancy rates remained low for the individual municipalities and new inventory was quickly absorbed (Table 3.5). According to Royal LePage, in the GTA market Vaughan reported the highest market share for lease and sale transactions for York Region.

It is important to note that as the high-tech market may have softened over time, it has also influenced the kind of industrial product now being built. Today, industrial buildings are smaller with more office space, more parking and building features similar to that of commercial space.

Commercial/Office Properties

Canada's office market improved in 2004 due to an increase in the activity in most of the downtown office markets across Canada. As a result of the increases in the demand for office space, vacancy rates across Canada decreased. The Greater Toronto Area, which represents nearly one-half of the Canadian market in terms of size, also showed a slight decrease by the fourth quarter of 2004 with an increase in inventory. The 2003 year end vacancy rate of 15.6% fell by the 2004 year end to 14.4% (Table 3.6).

Vacancy Rates and Total Inventory of Industrial Buildings in York Region, 2004

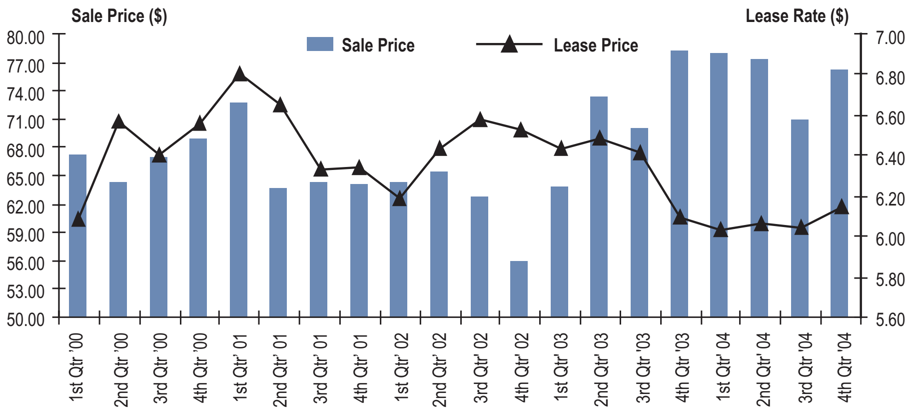
(TABLE 3.5)

	1st Qtr. 2004		2nd Qtr. 2004		3rd Qtr. 2004		4th Qtr. 2004	
	Inventory	Vac. Rate	Inventory	Vac. Rate	Inventory	Vac. Rate	Inventory	Vac. Rate
Aurora	6,002,531	4.2%	6,002,531	3.2%	6,034,710	4.9%	6,034,710	4.9%
Markham	33,626,199	4.1%	33,798,650	4.2%	34,180,892	4.4%	34,226,776	4.1%
Newmarket	5,831,772	2.8%	5,831,772	3.0%	5,952,078	4.0%	5,995,378	4.2%
Richmond Hill	11,056,878	3.8%	11,076,598	4.4%	11,800,629	7.7%	11,288,334	4.8%
Vaughan	73,437,144	3.7%	73,739,489	3.9%	77,599,858	5.2%	77,024,993	4.4%
Total (sq. ft.)	**129,954,524**	**3.8%**	**130,449,040**	**3.9%**	**135,568,167**	**5.1%**	**134,570,191**	**4.4%**

Source: Royal LePage, Industrial Market Update, 2004.

York Region Industrial Sale Price & Lease Rates ($/sq.ft.) 2000-2004

(FIGURE 3.4)



Note: North area includes Vaughan, Richmond Hill, Markham, Newmarket and Aurora.
Source: Royal LePage Suburban Industrial Research Department, 2000-2004.

While it is anticipated that the Canadian office market will continue to improve in 2005, the timing and magnitude of the recovery is dependent upon several factors. First and foremost is the health of the U.S. economy. What happens in the U.S. impacts Canada's economy. Many companies' expansion and relocation plans in the past few years have been put on hold for the time being. Companies have delayed major real estate decisions and opted for shorter-term leases, renewals and sublet opportunities.

Shadow space is another factor that have an effect on the office market according to CB Richard Ellis Ltd. Shadow space - office space that is currently leased but is not being used by the tenant - will come back on the market as sublet space or will not be renewed by tenants when their current leases are finished. "Either way, until the shadow space is absorbed it will have an impact upon vacancy rates."

Finally, companies will continue to effectively maximize the utilization of their office space. "Due to technology advances which brought about increased productivity, the average amount of space allocated per employee is now down to 210 square feet from 240 square feet a decade ago." Subsequently this reduces a company's demand for office space because they will not require as much space overall as they have had in the past (CB Richard Ellis, 2003).

Selected Office Market Vacancy Rates 2002-2004

(TABLE 3.6)

		2002				2003				2004			
Office Nodes	**2003 Inventory Total**	**1st Qtr.**	**2nd Qtr.**	**3rd Qtr.**	**4th Qtr.**	**1st Qtr.**	**2nd Qtr.**	**3rd Qtr.**	**4th Qtr.**	**1st Qtr.**	**2nd Qtr.**	**3rd Qtr.**	**4th Qtr.**
Markham North & Richmond Hill	6,435,855	22.3	21.5	20.5	20.7	24.4	23.5	23.8	21.2	16.6	16.5	14.2	14.7
Steeles Woodbine	2,716,959	14.1	13.5	13.8	16.7	13.6	13.6	12.4	12.4	12.1	11.4	11.9	9.4
Vaughan	1,433,404	11.2	10.1	8.6	9.2	12	11.8	11.2	10.4	7.9	6.4	5.9	10.7
GTA Total/Average	**138,520,882**	**12.4**	**13.3**	**13.2**	**13.7**	**14.5**	**15.2**	**15.7**	**15.6**	**15.4**	**15.2**	**14.5**	**14.4**

Source: CB Richard Ellis, Office Market Review, 2002-2004.

The three office nodes in York Region tracked by CB Richard Ellis Ltd had a vacancy rate between 14.7% in Markham North & Richmond Hill and 9.4% at Steels and Woodbine. All of these vacancy rates have fallen during 2004 as the office market has increased in step with greater economic activity in the Region. In comparison, the vacancy rate for the Greater Toronto Area was 14.4% (Table 3.6). For 2005, it is anticipated that the York Region office market will continue to see more new construction and increasing activity resulting from expected corporate expansions following economic recovery. The lease rates per sq. foot in York Region were between $11.99 and $14.71, with the lease rate for the GTA being $14.91 (Table 3.7).

Selected GTA Office Market Lease Rates ($/sq.ft.) 2002-2004

(TABLE 3.7)

		2002				2003				2004			
Office Nodes	**2003 Inventory Total**	**1st Qtr.**	**2nd Qtr.**	**3rd Qtr.**	**4th Qtr.**	**1st Qtr.**	**2nd Qtr.**	**3rd Qtr.**	**4th Qtr.**	**1st Qtr.**	**2nd Qtr.**	**3rd Qtr.**	**4th Qtr.**
Markham North & Richmond Hill		17.27	17.04	15.13	16.90	17.22	17.05	10.88	15.73	15.35	15.05	14.34	14.71
Steeles Woodbine		12.20	11.89	10.03	12.11	12.31	11.22	17.05	11.17	10.95	10.96	11.17	11.99
Vaughan		13.15	12.71	12.16	12.56	13.15	13.15	8.35	11.68	11.67	11.77	11.20	13.74
GTA Total/Average		**17.01**	**18.51**	**16.96**	**16.78**	**16.49**	**16.25**	**16.35**	**16.10**	**15.89**	**16.08**	**15.60**	**14.91**

Source: CB Richard Ellis, Office Market Review, 2002-2004.

Taxable Assessment

Taxable Assessment is a barometer of economic health and it helps to determine the fiscal capacity of the Region to sustain the services and infrastructure that the people of York Region depend on as they live, work and play.

Current Value Assessment (CVA) represents the fair market value of a property as of a certain date. In 2004, the CVA for properties in York Region totalled $107.4 billion, representing a growth of 4.9% ($5.0 billion) over 2003. The assessments determined by the Municipal Property Assessment Corporation (MPAC) for both 2003 and 2004 were based on the estimated market values as of June 30, 2003.

In May 2004, the Province announced a number of property taxation initiatives in the new Ontario Budget that would affect municipalities. According to the new legislation, the new assessment cycle will be as follows:

Taxation Year	Assessed Value
2005	June 30, 2003
2006 and beyond	January 1 of the preceding year

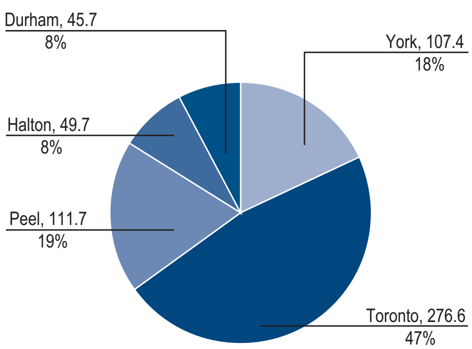
The Region's growth rates from 1998 to 2004 are illustrated in Table 3.8.

The overall ratio of residential to non-residential assessment in York Region was 83.3%/16.7% in 2004. All the York Region local municipalities had at least 80% assessment values in the residential category, except for the City of Vaughan which had 76.1% (Figure 3.5).

York Region's assessment growth was 4.9% in 2004 (Table 3.8). A comparison of taxable assessment for York Region with other Greater Toronto Area members is illustrated in Figure 3.6. As shown, York Region shared 18.2% of the total assessment of $591 billion in the GTA in 2004.

GTA Taxable Assessment ($Billions) 2004

(FIGURE 3.6)

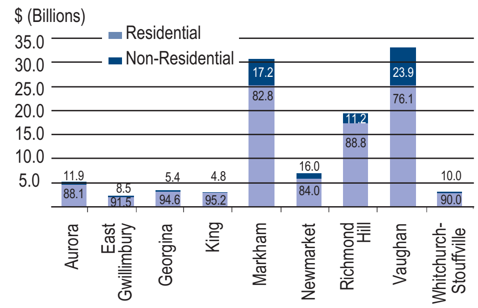


Source: Regional Tax Offices within the GTA, 2004.

Development charges are used to fund needed infrastructure improvements and to recover costs incurred to service new development. The total development charges collected by the Region since 1998 are illustrated in Table 3.9. Development charges collected in 2004 totalled $74.6 million. The major factor contributing to the decline in collections in 2004 is attributable to increased collections in 2003. Over $75 million in prepaid development charges were collected in the month immediately prior to the enactment of the revised DC By-law effective June 23, 2003. This influx of receipts accounted for virtually half of the total collections received in 2003, significantly increasing revenue over both prior and subsequent years.

Ratio (%) of Residential/Non-Residential Taxable Assessment 2004

(FIGURE 3.5)



Source: York Region Finance Department, 2004.

York Region Assessment Growth 1998 - 2004

(TABLE 3.8)

Year	Growth %
1998	3.8
1999	4.4
2000	4.1
2001	5.1
2002	3.8
2003	3.8
2004	4.9

Source: York Region Finance Department, 2004.

Total Development Charges for New Development in York Region 1998-2004

(TABLE 3.9)

Year	$ Millions
1998	108.2
1999	92.5
2000	90.1
2001	89.5
2002	108.4
2003	153.1
2004	74.6

Source: York Region Finance Department, 2004.

4. Building Activities

Number of Permits Issued for New Residential Units in York Region, 2003 & 2004

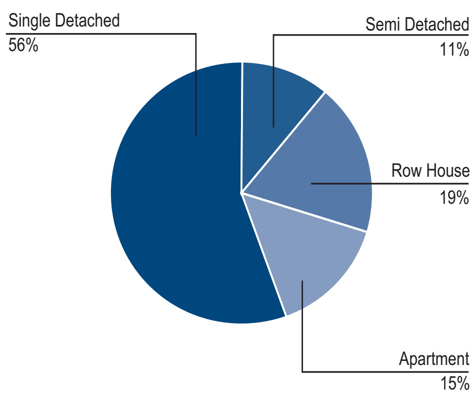
(TABLE 4.1)

Municipality	2003	2004	% Change
Aurora	1,169	350	-70
East Gwillimbury	169	112	-34
Georgina	261	240	-8
King	212	46	-78
Markham	3,385	3,143	-7
Newmarket	658	876	33
Richmond Hill	1,826	2,259	24
Vaughan	2,244	2,028	-10
Whitchurch-Stouffville	219	252	15
York Region Total	**10,143**	**9,306**	**-8**

Source: Area Municipal Building Permit Reports, Statistics Canada Building Permit Reports, 2004.

York Region 2004 Building Permit Mix

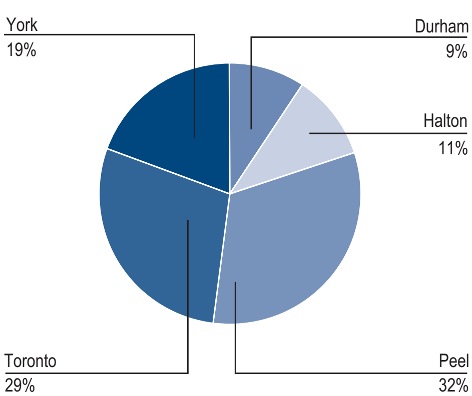
(FIGURE 4.1)



Source: York Region Planning and Development Services, 2004 and Area Municipal Bulding Permits Reports, 2004.

York Region's Share of GTA Building Activity 2004

(FIGURE 4.3)



Source: Statistics Canada Table 32.2, 2004.

Building Permits

Building permit activity is a standard indicator of local investment and economic performance. In 2004, York Region experienced strong activity in the residential construction sector. Compared to 2003, the total number of permits issued for new residential dwellings was lower. On the other hand, the value of ICI (industrial commercial and institutional construction) maintained its strong 2003 growth in 2004.

In 2004, building permits were issued for 9,306 new residential units in York Region (Table 4.1). This figure represents an 8% decrease from the 10,143 residential units with permits that were issued during the same period in 2003.

It must be remembered that the Regional Official Plan calls for the production of an average of 8,750 housing units annually. In the last several years the number of residential building permits issued has been well above that forcast. Softening of this growth still represents very strong growth. It is still well above the Regional Official Plan average. The municipalities of Vaughan, Markham and Richmond Hill accounted for 80% of the total residential building permit activity in 2004.

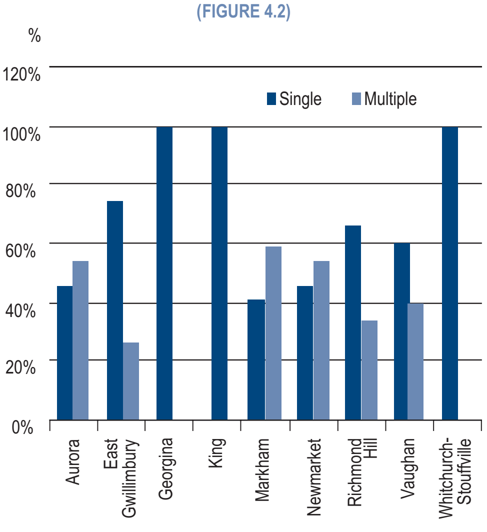
A majority of the building permits issued for new residential units were for single detached units. These made up 56% of the total, while 11% were for semi-detached units, 19% were for row house units and 15% were for apartments (Figure 4.1). A mix of dwelling types was recorded in the nine area municipalities. Single detached units accounted for as much as 100% of the new residential building permits issued in Georgina, King and Whitchurch-Stouffville and as little as 41% of the new residential building permits issued in Markham (Figure 4.2).

Building permits were issued for approximately 46,700 new residential units in the GTA during 2004. York Region accounted for 19% of all the building permits issued for new residential units in the GTA. Durham Region issued 9%, the Region of Halton issued 11%, the Region of Peel issued 32%, and the City of Toronto issued 29% (Figure 4.3).

When comparing the number of permits issued for new residential units across the whole of Canada, York Region ranked in the top 6 (Table 4.2). York ranked 5th last year. It is important to note that cities across Canada are organized in different ways. This list includes cities, Regions and Regional Districts as defined locally.

York Region Building Permit Mix 2004

(FIGURE 4.2)



Source: York Region Planning and Development Services Department, 2004.

Construction Value

The total estimated construction value for York Region in 2004 was $2.56 billion. This value was less that the value recorded during the same period in 2003 ($2.72 billion). The largest percentage increases in construction value were Richmond Hill 25% ($534 million), Georgina 24% ($46 million), East Gwillimbury 18% ($50 million) (Table 4.3).

York Region Estimated Value of Total Construction in York Region 2003-2004

(TABLE 4.3)

Municipality	($'000's) 2003	($'000's) 2004	% Change
Aurora	$191,243	$192,680	1
East Gwillimbury	$42,345	$50,171	18
Georgina	$37,265	$46,063	24
King	$70,163	$38,656	-45
Markham	$658,952	$631,384	-4
Newmarket	$175,978	$148,151	-16
Richmond Hill	$426,798	$534,172	25
Vaughan	$1,067,040	$861,775	-19
Whitchurch-Stouffville	$57,116	$56,719	-1
York Region Total	**$2,726,900**	**$2,559,770**	**-6**

Source: York Region Planning and Development Services Department and Area Municipal Building Permit Reports, 2004.

Comparative Residential Building Permit Figures Across Canada 2004

(TABLE 4.2)

Rank	Municipality	# of Permits
1	Greater Vancouver Regional District	20,973
2	Peel Region	14,390
3	City of Calgary	13,200
4	City of Toronto	12,487
5	City of Montreal	12,313
6	**York Region**	**9,306**
7	City of Edmonton	9,142
8	City of Ottawa	7,180
9	Halton Region	5,652
10	Durham Region	4,903

Note: List includes cities, Regions and Regional Districts as defined locally.
Source: Statistics Canada Building Permit Reports and Table 32.2 (unpublished), 2004.

Although residential construction activity moderated in 2004, the value of non-residential construction permits rebounded from a very difficult 2002 and recovery in 2003. Due to increased demand for commercial (office and retail) uses, the value of ICI construction dipped only slightly from $873 million in 2003 to $ 866 million in 2004 (an decrease of 0.8%). Overall, there was a 16.4% increase in the value of commercial construction permits in 2004. Industrial construction decreased by 1% and institutional construction decreased by 22.3%.

By contrast, the value of residential construction in 2004 ($1.69 billion) declined by 8.7% from very strong residential construction in 2003 - valued at $1.85 billion (Table 4.4). However, two municipalities in York Region, Newmarket and Richmond Hill, experienced increases in residential construction values while the rest experienced slight decreases in residential construction.

York Region Estimated Value ($000's) of Construction* 2003-2004

(TABLE 4.4)

	Residential		Industrial**		Commercial		Institutional		Total	
Municipality	**2003**	**2004**	**2003**	**2004**	**2003**	**2004**	**2003**	**2004**	**2003**	**2004**
Aurora	172,188	75,408	1,184	2,261	5,954	89,882	11,918	25,128	191,244	192,680
East Gwillimbury	25,928	24,110	2,688	15,355	11,035	8,838	2,694	1,868	42,345	50,171
Georgina	32,915	35,867	2,320	7,436	1,300	2,535	730	225	37,265	46,063
King	61,063	33,243	6,614	1,457	1,761	430	725	3,526	70,163	38,656
Markham	542,909	503,798	23,694	25,705	44,756	73,327	47,593	28,554	658,952	631,384
Newmarket	75,984	97,843	33,432	16,531	27,489	7,819	39,072	25,958	175,977	148,151
Richmond Hill	350,397	439,678	16,113	38,775	26,203	25,870	34,086	29,848	426,799	534,172
Vaughan	547,887	429,166	191,688	169,522	208,159	175,387	119,306	87,700	1,067,040	861,775
Whitchurch-Stouffville	44,965	54,799	2,313	307	4,330	1,073	5,509	540	57,117	56,719
York Region Total	**1,854,236**	**1,693,913**	**280,046**	**277,350**	**330,987**	**385,161**	**261,633**	**203,347**	**2,726,902**	**2,559,770**

Source: York Region Planning and Development Services Department
Area Municipal Building Permits Reports
Statistics Canada Building Permits Publication, 2004
*Estimated values of construction include additions, renovations, temporary structures and new construction
**Agricultural permits are included under the industrial category

The residential construction in York Region was down slightly from the rebounding market in 2003. Interest rates remained low and residential construction was still strong (Figure 4.4).

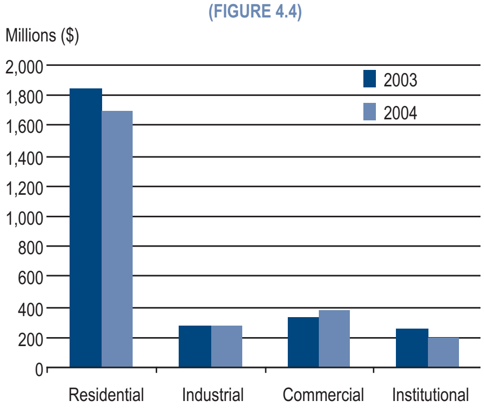
Traditionally, building activity in York Region has been dominated by the residential sector, but recent building permit reports (with the exception of 2002) demonstrate a more balanced distribution of building activity in York Region. In 2002, the strength of the residential construction sector in combination with a noticeable decline in the industrial, commercial and institutional construction resulted in 78% of the total construction value in York being residential. In 2003, a slowdown in the pace of residential construction allowed the Region's building permits to once again have a more balanced distribution (68% residential). In 2004, 66% of the total construction value in York Region was generated from residential construction.

York Region maintained its strong ICI construction in 2004. The ICI values went down by only 0.8% compared to the strong value of ICI construction in 2003.

York Region's ICI values rose 47.4% in 2003 after a very difficult 2002. Institutional construction was way up in 2003 and was not up to those record highs in 2004. Commercial and industrial construction was up or held its own in 2004. Historically, ICI values usually rise in the second half of the calendar year as indicated in Figure 4.5. The trend also shows that construction in York Region is becoming more diversified. Also of interest is that an increase in the value of ICI signals a potential expansion in industrial and commercial activities. This will stimulate more employment generation in the Region in the long run.

Estimated Construction Values by Building Type in York Region 2003 & 2004

(FIGURE 4.4)



Source: Area Municipal Building Permit Reports, 2004.

It is important to note that the value of industrial, commercial and institutional (ICI) construction in York Region has increased steadily since 1995. The annual value of ICI construction has increased from $315 million (1995) to $866 million in 2004 (Figure 4.6). Non-residential construction was so strong in 2001 (a record year) that it may have played a role in dampening ICI construction values in 2002. Overall, the trend for ICI construction in York Region has been on the rise with the exception of a lower value recorded in 2002, which is considered an anomaly. The remarkable increase in the value of ICI in 2003 and 2004 demonstrates recovery and a positive development.

Building Permits with the Highest Construction Values in York Region 2004

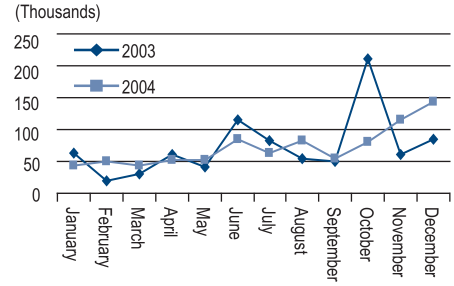
(TABLE 4.5)

Project	Value $000	Use	Municipality
Apartment Building (Circa)	53,238	Residential	Markham
Office Building (State Farm)	50,000	Commercial	Aurora
Apartment Building (Gates of Bayview Glen)	33,084	Residential	Richmond Hill
Secondary School	23,706	Institutional	Vaughan
Office Building (CGI building)	20,648	Commercial	Markham
Recreation Facility (Commercial)	19,890	Commercial	Vaughan
Recreation Facility (Aurora Complex)	19,000	Institutional	Aurora
Apartment Building	18,829	Residential	Vaughan
Apartment Building (Yonge Street)	18,545	Residential	Richmond Hill
Nursing/Retirement Home	18,500	Institutional	Vaughan
Industrial Addition/Alteration	17,000	Manf-Industrial	Richmond Hill
Apartment Building	16,143	Residential	Markham
Shopping Centre (Loblaws)	15,000	Commercial	Aurora
Single Use (Industrial)	14,479	Manf-Industrial	Vaughan
Single Use (Industrial)	14,000	Manf-Industrial	East Gwillimbury
Single Use (Industrial)	13,935	Manf-Industrial	Vaughan
Recreation Facility (Commercial)	13,898	Commercial	Vaughan
Nursing/Retirement Home	13,000	Institutional	Newmarket
Commercial Addition/Alteration (Vaughan Mills addition)	12,077	Commercial	Vaughan
Apartment Building	11,095	Residential	Markham
Single Use (Industrial)	10,312	Manf-Industrial	Vaughan
Nursing/Retirement Home (Thornhill)	10,000	Institutional	Vaughan
Office Building	9,598	Commercial	Vaughan
Single Use (Industrial)	9,102	Manf-Industrial	Vaughan
Business and Prof. Office Unit	9,000	Commercial	Aurora

Source: Area Municipality Building Permits, January to December 2004.

Monthly Comparison for York Region ICI Values 2003-2004

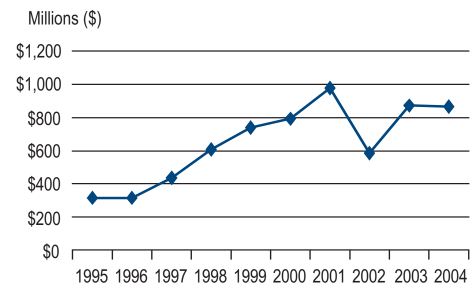
(FIGURE 4.5)



Source: York Region Planning and Development Services Department, 2004.

Value of ICI Construction in York Region 1995 - 2004

(FIGURE 4.6)



Source: York Region Planning and Development Services Department, 2004.

Construction Activity - National Comparisons

To help gauge the level of construction activity in York Region, a comparison of the construction values for the top ten municipalities throughout Canada was conducted. For residential activity, York Region ranked fourth with approximately $1.69 billion of residential construction (Table 4.6).

The total estimated value of institutional construction in York Region in 2004 was $203 million - a decrease of 6.1% from 2003. As Table 4.5 indicates, the construction projects in York Region in 2004 were diverse. The list included new schools (secondary and elementary schools), community recreation facilities and long-term care facilities along with commercial, industrial and residential uses.

When the values of all types of construction activity are combined, York Region is ranked fourth in the country with $2.56 billion (Table 4.7). The total value of York Region's industrial, commercial and institutional construction (ICI) accounted for 34% of total construction value in York Region in 2004.

When compared to other municipalities across Canada, York Region's ICI value in 2004 moves the Region up to fifth place in the country (from sixth place in 2003) (Table 4.8).

Cross Canada Comparisons 2004: Values of Residential Construction ($000's)

(TABLE 4.6)

Rank	Municipality	Residential Value
1	Greater Vancouver Regional District	3,613,017
2	Peel Region	2,850,427
3	City of Toronto	1,887,608
4	**York Region**	**1,693,913**
5	City of Calgary	1,591,059
6	City of Montreal	1,442,226
7	City of Ottawa	1,631,618
8	Halton Region	1,379,189
9	City of Edmonton	1,265,521
10	Durham Region	1,232,033

Source: Area Municipal Building Permit Reports, Statistics Canada Building Permit Reports and Table 32.2 (unpublished), 2004.

Cross Canada Comparisons 2004: Values of Total Construction ($000's)

(TABLE 4.7)

Rank	Municipality	Total Value
1	Greater Vancouver Regional District	4,842,781
2	Peel Region	4,210,606
3	City of Toronto	3,749,326
4	**York Region**	**2,559,770**
5	City of Montreal	2,490,722
6	City of Calgary	2,447,730
7	City of Ottawa	1,631,618
8	Halton Region	1,379,189
9	City of Edmonton	1,265,521
10	Durham Region	1,232,033

Source: Area Municipal Building Permit Reports, Statistics Canada Building Permit Reports and Table 32.2 (unpublished), 2004.

Cross Canada Comparisons 2004: Values of ICI Construction ($000's)

(TABLE 4.8)

Rank	Municipality	Industrial	Commercial	Institutional	Total
1	City of Toronto	181,167	947,455	733,096	1,861,718
2	Peel Region	448,645	486,148	425,386	1,360,179
3	Greater Vancouver Regional District	140,419	812,400	276,945	1,229,764
4	City of Montreal	150,476	523,962	374,058	1,048,496
5	**York Region**	**227,350**	**385,161**	**203,347**	**865,857**
6	City of Calgary	620,883	53,220	182,568	856,671
7	City of Ottawa	14,504	403,503	119,514	537,521
8	City of Edmonton	334,581	67,736	79,619	481,936
9	Durham Region	43,985	228,188	104,223	376,396
10	Halton Region	71,997	242,944	33,768	348,709

Source: Area Municipal Building Permit Reports, Statistics Canada Building Permit Reports and Table 32.2 (unpublished), 2004.

Housing Starts

Housing starts declined slightly in 2004 compared to 2003 by about 7.5%. A total of 10,221 housing units were started in 2004 compared to 11,049 housing units were started in 2003. (Table 4.9). This represents a softening of housing construction activity over the period. The Regional Official Plan calls for the production of an average of 8,750 housing units annually. Although there was a decline in housing starts in 2004, the figure is well above the target set forth in the Regional Official Plan.

Housing Starts by Municipality in York Region 2003 & 2004

(TABLE 4.9)

Aurora	2003	2004
Singles	777	188
Semis	136	18
Rows	279	228
Apts.	0	0
Total	**1192**	**434**

King	2003	2004
Singles	169	56
Semis	10	0
Rows	20	0
Apts.	0	0
Total	**199**	**56**

Richmond Hill	2003	2004
Singles	1,355	1,391
Semis	52	62
Rows	394	283
Apts.	233	454
Total	**2,034**	**2,190**

East Gwillimbury	2003	2004
Singles	75	94
Semis	0	0
Rows	4	76
Apts.	0	0
Total	**79**	**170**

Markham	2003	2004
Singles	2,167	1,669
Semis	554	820
Rows	650	654
Apts.	614	710
Total	**3,985**	**3,853**

Vaughan	2003	2004
Singles	1,681	1,293
Semis	222	92
Rows	376	274
Apts.	278	454
Total	**2,557**	**2,113**

Georgina	2003	2004
Singles	177	262
Semis	26	0
Rows	49	0
Apts.	0	0
Total	**252**	**262**

Newmarket	2003	2004
Singles	300	377
Semis	72	174
Rows	242	335
Apts.	0	0
Total	**614**	**886**

Whitchurch-Stouffville	2003	2004
Singles	137	257
Semis	0	0
Rows	0	0
Apts.	0	0
Total	**137**	**257**

York Region		
Singles	6,838	5,587
Semis	1,072	1,166
Rows	2,014	1,850
Apts.	1,125	1,618
Total	**11,049**	**10,221**

Source: Canada Mortgage and Housing Corporation - Local Housing Market Report 2003 and 2004.

York Region Residential Building Permit Activity 2003 & 2004

(TABLE 4.10)

	2003	2004
New Residential Permits	10,143	9,306
Housing Starts	11,049	10,221
Housing Completions	10,410	10,679

Source: York Region Planning and Development Services Department, 2003 and 2004.

Housing Completions

Housing completions, which represent the end of the construction cycle (Table 4.10), increased by 2.5% in 2004. A total of 10,679 houses were completed in York Region by the end of 2004, as compared to 10,410 houses completed in 2003 (Table 4.11). The housing completion numbers are also directly related to housing starts.

Housing Completions by Municipality in York Region 2003 & 2004

(TABLE 4.11)

Aurora	2003	2004
Singles	329	687
Semis	2	134
Rows	84	248
Apts.	0	0
Total	**415**	**1,069**

King	2003	2004
Singles	118	113
Semis	4	8
Rows	14	15
Apts.	0	0
Total	**136**	**136**

Richmond Hill	2003	2004
Singles	1,280	1,239
Semis	38	72
Rows	555	463
Apts.	426	215
Total	**2,299**	**1,989**

East Gwillimbury	2003	2004
Singles	36	106
Semis	0	0
Rows	0	60
Apts.	0	0
Total	**36**	**166**

Markham	2003	2004
Singles	2,127	1,845
Semis	264	778
Rows	565	631
Apts.	126	602
Total	**3,082**	**3,856**

Vaughan	2003	2004
Singles	2,474	1,603
Semis	364	234
Rows	494	364
Apts.	138	0
Total	**3,470**	**2,201**

Georgina	2003	2004
Singles	150	229
Semis	30	10
Rows	43	52
Apts.	0	0
Total	**223**	**291**

Newmarket	2003	2004
Singles	279	287
Semis	60	130
Rows	248	285
Apts.	39	132
Total	**626**	**834**

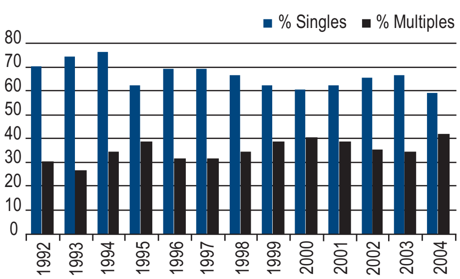
Whitchurch-Stouffville	2003	2004
Singles	121	137
Semis	2	0
Rows	0	0
Apts.	0	0
Total	**123**	**137**

York Region		
Singles	6,914	6,246
Semis	764	1,366
Rows	2,003	2,118
Apts.	729	949
Total	**10,410**	**10,679**

Source: Canada Mortgage and Housing Corporation - Local Housing Market Report 2003 and 2004.

York Region Residential Completion History (1992 - 2004)

(FIGURE 4.7)



Source: Canada Mortgage and Housing Corporation, 1992 - 2004.

A breakdown shows that 6,246 or 58% of the housing units completed in 2004, were single family detached units, 1,366 or 13% were semi-detached units, 2,118 or 20% were row house units and 949 or 9% were apartments. Over time the number of multiple unit dwellings has increased across the Region (Figure 4.7).

Diversity of Housing Supply

As outlined in the Region's Housing Supply Strategy, one of York Region's key goals is to encourage the further diversification of the housing stock to ensure that the needs of the Region's workers and residents are met. Although the Region's housing stock is composed primarily of single detached dwellings, the stock is becoming increasingly diversified over time.

In the last ten years, for example, the supply of single detached homes has fallen from 80% of the total housing stock to 73%. This figure varies considerably across the area municipalities from highs of 94% and 91% in King and East Gwillimbury respectively to 63% in Markham and Newmarket (Table 4.12).

As the percentage of single detached units has decreased, more housing choice is available to the residents of York Region. As of December 31, 2004, 27% of the stock in York Region was made up of multiple-dwelling units, of which 5% were semi-detached, 10% were row houses and 12% were apartment units (Figure 4.8).

Persons Per Unit

In the 30 year period from 1971 to 2001, (most recent census figures available on persons per unit) York Region's persons per unit figure (PPU) has decreased for residential dwellings. In 1971, the Region had an average of 3.65 persons per unit. Thirty years later, in 2001, the PPU figure was 3.25 - a pattern reflected nationally.

The Canada Mortgage and Housing Corporation (CMHC) identify the ageing population as shaping national household composition. Between 1971 and 2001, one person households grew faster than all other types. The collective effect of changes in household composition has been a steady drop in average household sizes nation wide.

Locally, the 2001 Census also revealed some variation between the area municipalities with regard to the PPU. Markham and Vaughan had the highest figure with 3.43 persons per household and Georgina had the lowest with 2.81 persons per household (Table 4.13).

Persons Per Dwelling Unit, York Region, 1971-2001

(TABLE 4.13)

Municipality	1971	1991	1996	2001
Aurora	3.68	3.08	3.09	3.05
East Gwillimbury	3.41	3.22	3.16	3.09
Georgina	3.41	2.8	2.86	2.81
King	3.76	3.14	3.06	3.05
Markham	3.81	3.5	3.5	3.43
Newmarket	3.53	3.14	3.1	3.05
Richmond Hill	3.71	3.12	3.23	3.18
Vaughan	3.66	3.71	3.58	3.43
Whitchurch-Stouffville	3.56	2.98	2.96	2.92
York Region Total	**3.65**	**3.32**	**3.31**	**3.25**

Source: Statistics Canada, Census 1971, 1991, 1996, 2001.

Percentage of Dwellings by Structural Type in York Region 2004

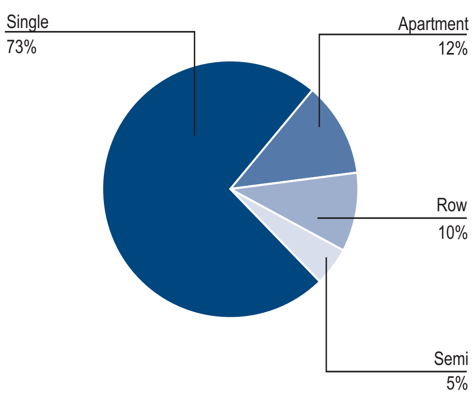
(TABLE 4.12)

Municipality	% Singles	% Multiples
Aurora	68%	32%
East Gwillimbury	91%	9%
Georgina	85%	15%
King	94%	6%
Markham	73%	27%
Newmarket	63%	37%
Richmond Hill	65%	35%
Vaughan	75%	25%
Whitchurch-Stouffville	84%	16%
York Region Total	**73%**	**27%**

Source: York Region Planning and Development Services Department, 2004.
Multiples: includes semis, rows and apartments.

York Region Mix of Housing Stock 2004

(FIGURE 4.8)



Source: Planning and Development Services Department, 2004.

5. Planning

When preparing development plans and strategic policies, the Regional Planning and Development Services Department works co-operatively with area municipalities and other stakeholders. The interactive relationships between the Region and area municipalities produce innovative planning policies and initiatives. A number of significant planning activities and approvals have occurred in 2004.

York Region Official Plan Amendment 43
Centres and Corridors Strategy

Significant strides were made in 2004 to advance the implementation of the Region's planned urban structure of Regional Centres linked by Regional Corridors, served by rapid transit.

The York Region Centres and Corridors Strategy: Making it Happen! was endorsed by Regional Council on June 24. The Strategy is a comprehensive, long-term and action-oriented approach to implementing the Region's planned urban structure through supportive policies, programs, infrastructure investment and financial tools.
Regional Official Plan Amendment (ROPA) No. 43 was adopted by Regional Council on December 16 and came into force and effect without appeal on January 7, 2005. The amendment enhances the existing policies of Chapter 5 - Regional Structure and Growth Management, and Chapter 6 - Regional Infrastructure to advance the implementation of the Region's planned urban structure. Policy enhancements include the identification of Key Development Area, a density target of 2.5 FSI (Floor Space Index), urban design guidelines and infrastructure co-ordination.

Town of Georgina
Official Plan Amendment 93 - The Keswick Secondary Plan

On September 23, 2004 Regional Council approved Official Plan Amendment No. 93 (OPA 93) for the Town of Georgina Planning Area. The Keswick Secondary Plan area is generally defined by Ravenshoe Road on the south, Old Homestead Road and Boyer's Sideroad on the north, Woodbine Avenue on the east and Cook's Bay on the west.

The purpose and effect of this Amendment is to amend the Town of Georgina Official Plan to introduce a comprehensive update to the existing Keswick Secondary Plan, replacing OPA 71; introduce a business park study area outside of the existing urban boundary of southeastern Keswick; and to advance the concept of an additional Highway 404 interchange at the proposed intersection of the Highway extension and Glenwoods Avenue.

The Region approved the OPA 93 with 49 modifications and 4 deferrals. Despite an appeal to the Ontario Municipal Board being submitted on the boundaries of the proposed business park and the proposed interchange of Highway 404 at Glenwoods Avenue, the Secondary Plan came into effect on October 26, 2004.

Township of King
Official Plan Amendment 57 - Nobleton Community Plan

Regional Council approved Official Plan Amendment (OPA) No.57 on January 22 - putting in place a new Community Plan for Nobleton, one of the Township's three urban centres. The plan will guide development and infrastructure investment in Nobleton to 2016 - providing opportunities for population and employment growth while maintaining the community's unique, historic rural character.

Highlights on the Plan include the provision of full municipal services, a 2016 urban serviced population of approximately 6,500 persons, additional employment lands totalling 21.5 hectares (53 acres), a development form and design that is compatible with existing built-up areas, a mix of housing opportunities, and approximately 160 hectares (395 acres) for new residential development.

City of Vaughan
Official Plan Amendment 610 - Highway 27 Valley Corridor Study

On November 17, 2004 Regional Council approved Amendment 610 to the City of Vaughan's Official Plan. OPA 610 completes the Kleinberg-Nashville Community Plan by providing detailed policies for the environmental area currently designated "Regional Road 27 Valley Corridor Study Area" between Rutherford Road and Nashville Road which makes up about 20% of the community plan area.

The main objectives of OPA 610 are to put in place a framework for the development of a natural trail system in the valley corridor, improve the policies for enhancement, restoration and acquisition of natural areas in the valley corridor and define where limited development potential is appropriate. OPA 610 came into force on December 16, 2004.

6. Processing of Development Applications

Plans of Subdivision and Condominium

In 2004, the Region received 53 subdivision applications with 13,269 dwelling units and a further 13 condominium plans with 333 units. A total of 9 subdivision applications with 1,736 dwelling units and 7 condominium plans with 87 units received draft plan approval by the Region and the area municipalities in 2004. In the same period, 69 plans with 5,480 dwelling units were registered (Table 6.1).

Subdivision and Condo Activity, York Region, 2004

(TABLE 6.1)

	Subdivision Applications	Dwelling Units	Condo Applications	Dwelling Units
New Applications	53	13,269	13	333
Draft Approved	9	1,736	7	87
Registered	69	5,480	0	0

Source: York Region Planning and Development Services Department, 2004.

Among the new applications received, 65% of the total dwelling units proposed were single-detached, 18% were semi-detached, 9% were row houses and 8% were apartments.

Among the 2004 registered plans 3,252 (59%) of the total dwelling units were single-detached and 2,228 (40%) were multi-family dwelling units (1,047 were semi-detached and 1,181were row houses).

In 2004, draft approval was given to plans of subdivision and plans of condominium containing 7.21 hectares of industrial lands and commercial lands. Industrial and commercial lands totalling 53.40 hectares were registered.

As of December 31, 2004 there were 240 subdivision applications with 44,894 dwelling units (currently under review) and 61 condominium plans for 2,671 units draft approved and awaiting registration (Table 6.2).

Unit Breakdown in New Subdivisions and Condos York Region, 2004
Percentage of Dwelling Units

(TABLE 6.2)

	Single	Semi	Row	Apartment
Applications	52	10	21	17
Draft Approved	48	9	19	24
Registered	60	19	21	0

Source: York Region Planning and Development Services Department, 2004.

Among the draft approved applications 21,633 of the total dwelling units were single-detached, 4,003 were semi-detached, 8,444 were row houses and 10,814 were apartments.

The Regional Official Plan recommends a 3-7 year supply of draft approved and registered lots and blocks for housing. The total of 53,045 draft approved and registered units represents a 6 year supply of draft approved and registered lots/units based on the forecasted average production of the 8,750 units per year.

Appendices

Municipal Economic Development Contacts

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Town of Richmond Hill Economic and Development Department
City of Vaughan Economic and Development Department
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York Region Planning and Development Services Department
Conference Board of Canada

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Town of East Gwillimbury Building Department
Town of Georgina Building Department
Township of King Building Department
Town of Markham Building Department
Town of Newmarket Building Department
Town of Richmond Hill Building Department
City of Vaughan Building Department
Town of Whitchurch-Stouffville Building Department

5. Planning Activities

York Region Planning and Development Services Department

6. Processing of Development Applications

York Region Planning and Development Services Department

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