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YORK REGION VACANT EMPLOYMENT LAND INVENTORY

The Planning and Economic Development Committee recommends the following:

- 1. The presentation by Paul Bottomley, Manager, Growth Management Economy and Information Research, Long Range and Strategic Planning Branch, be received; and**
- 2. The recommendations contained in the following report dated November 20, 2007, from the Commissioner of Planning and Development Services, be adopted:**

1. RECOMMENDATIONS

It is recommended that:

1. This report be received as first in a series of reports on employment in York Region.
2. This report be circulated by the Regional Clerk to local municipal planning departments and other interested stakeholders.

2. PURPOSE

The purpose of this report is to provide Regional Council with an update on the Region's Vacant Employment Land Inventory as follows:

- Updating the January 1, 2005 inventory and reporting significant changes.
- Overview of intensification potential in employment areas.

3. BACKGROUND

Economic vitality is a cornerstone of the Regional Official Plan. A diverse range of vacant employment lands aids York Region communities in achieving economic development objectives, and bolsters the fiscal health of the Region.

Places to Grow, the Provincial Growth Plan for the Greater Golden Horseshoe contains policies on:

- The need to protect employment areas and promote economic development and competitiveness.
- The conversion of lands within employment areas, to non-employment uses that can only occur through a municipal comprehensive review.
- Promoting intensification to accommodate a significant portion of new growth.

This updated Vacant Employment Land Inventory is current to July 1, 2006. The Vacant Employment Land Inventory is an important component of York Region's growth management system. It is anticipated that the inventory will continue to provide relevant employment land information to assist in monitoring the pace and location of growth.

3.1 Study Objectives

An update to the regional inventory of the supply of employment lands was created in 2001. In 2005, a complete update to the 2001 inventory took place. This report updates the inventory using a revised data collection methodology that provides greater detail and accuracy.

The key objectives of the vacant employment land inventory are to:

- Provide an inventory of the supply and characteristics of vacant employment land.
- Provide data on the rate of employment land absorption.
- Identify employment land development trends.
- Identify intensification opportunities in employment areas.
- Provide a basis for reviewing Regional Official Plan policies.
- Provide a basis for supply/demand analysis.
- Provide a basis to attract investment to the Region

3.2 Employment Areas & Vacant Employment Lands

Employment Areas refer to those areas designated in an official plan for clusters of business and economic activities including, but not limited to, manufacturing, warehousing, offices and associated retail and ancillary facilities. Traditionally employment areas referred strictly to districts dedicated to industrial land uses. Changes in the economy have altered the function of employment areas to include a broader range of uses. In addition to traditional manufacturing and industrial activities, employment lands now include commercial, business, personal service, and other activities.

Vacant employment lands refer to vacant parcels of land in designated employment areas, as well as vacant lands in rural areas that have received approval for industry on private services. Isolated industrial/commercial parcels in the rural area that are outside designated employment areas are not included in the inventory. Mixed use areas such as the Vaughan Corporate Centre, Bayview Glen in Richmond Hill and the Whitchurch-Stouffville live-work area have not been captured.

3.2.1 Potential Future Employment Areas

The following six areas are in various planning stages, and will potentially be added to the Vacant Employment Land Inventory in the near future.

Keswick Business Park, in the Town of Georgina, has not been included in this inventory because it has been appealed to the Ontario Municipal Board (OMB) and has not received final approval. The lands comprise approximately 260 gross hectares (642

gross acres), located on the east side of Woodbine Avenue, north of Ravenshoe Road, with approximately 208 net hectares (514 net acres) of employment land. The proposed area is on the easterly limits of the community of Keswick, adjacent to the Keswick West Employment Area.

Highway 400 Employment Lands in Vaughan are located along Highway 400 between Teston Road to the south and the King-Vaughan boundary to the north. These lands have not been included in this inventory, pending the approval of ROPA 52 and Vaughan OPA 637. The area comprises approximately 415 net hectares (1,026 net acres) of employment lands.

Buttonville Airport has been added to Markham's Allstate Employment Area, but has not been considered vacant as part of this analysis. The airport lands are zoned for both industrial and airport uses. If the lands become available, it will add 52 net hectares (128 net acres) of employment land to Markham's vacant employment land inventory.

Aurora 2C lands are the only remaining greenfield lands within the Town of Aurora. An application has been made to expand the urban boundary to include these lands. This 445 hectare site (1,100 acres) is located north of Wellington Street, east of Bayview, and extends to Highway 404 and the Aurora/Newmarket boundary. A preliminary assessment indicates there is approximately 238 hectares (588 acres) of developable land, and approximately 75 net hectares (185 net acres) of employment land. Currently, the Aurora 2C lands are before the OMB.

North Leslie in Richmond Hill is an area of approximately 620 hectares (1,530 acres) within the area generally bounded by Bayview Avenue to the west, Highway 404 to the east, Elgin Mills Road East to the south and Nineteenth Avenue to the north. There is an estimated 76 net hectares (188 net acres) of employment land in North Leslie. An OMB decision regarding the North Leslie Secondary Plan is currently under appeal. At issue are employment designations within the planning area.

Cornell Employment Lands are projected in Markham, along the town's eastern urban boundary limit. There is an estimated 70 net hectares (173 net acres) of employment land north of the current Box Grove Employment Area and Highway 407, on either side Highway 7.

The estimated net total of these potential future employment areas is approximately 896 net hectares (2,214 net acres).

3.3 Employment Categories

Employment is typically divided into three broad land use based categories:

- **Major office employment** in free standing office buildings 20,000 square feet or greater.

- **Population related employment** serves the population, such as retail services, education services, municipal government services, social and community services, medical services and local office uses (banks, legal and accounting services).
- **Employment land employment** occurs in employment areas (i.e. business and industrial parks) and includes such activities as manufacturing, research and development, wholesale warehousing, etc. This type of employment generally requires new vacant land for development.

All three land use categories of employment can occur within employment areas, however the majority is employment land employment. According to the York Region employment survey, approximately 57% of jobs in York Region are in employment areas. The availability of a wide variety of vacant employment lands over the last decade has made it possible to maintain a strong job creation rate that has kept pace with population growth.

3.4 Intensification in Employment Areas

The Provincial Policy Statement and *Places to Grow* identify intensification as the development of a property, site or area at a higher density than already exists through:

- a) redevelopment, including the reuse of brownfield sites;
- b) the development of vacant and/or underutilized lots within previously developed areas;
- c) infill development; or
- d) the expansion or conversion of existing buildings.

Places to Grow gives priority to accommodating population and employment growth by directing a significant portion to the built-up areas of the community through intensification. The analysis section of this report will include a preliminary investigation into how these intensification options may apply to employment areas in York Region.

3.5 Internet Mapping

For the 2005 Vacant Employment Land Inventory, interactive map layers and reference maps for each of the nine local municipalities were made available online. These reference maps display the locations of all employment lands as well as the vacant parcels within the employment lands. These maps are being updated to reflect the 2006 Vacant Employment Land Inventory and are included in *Attachment 1*. Internet mapping makes vacant employment land information readily available to economic development staff, the real estate industry and businesses seeking site options.

4. ANALYSIS AND OPTIONS

4.1 Key Findings

The key findings of the 2006 Vacant Employment Land Inventory are:

1. From 2001 to 2006, the average annual absorption rate of employment lands was 120 net hectares (304 net acres).
2. As of July 1, 2006 the total vacant employment land supply amounted to 2,894 net hectares (7,151 net acres). This includes lands in registered, draft approved, and pending plans of subdivision as well as lands designated for employment uses in approved official plans where no application has yet been received.
3. The supply of registered and draft approved employment land in York Region is 1,127 net hectares (2,787 net acres).
4. Approximately 810 net hectares (2,002 net acres), or 28% of the Region's vacant land supply is located in areas that are not available for development in the short to medium term. Approximately 628 net hectares (1,553 net acres) in west Vaughan are encumbered until the route of the Highway 427 extension is determined. Similarly, approximately 182 net hectares (450 net acres) in the Queensville employment area are encumbered pending the Highway 404 extension and the expansion of wastewater services into the area.
5. A total of 191 net hectares, or 7% of the regional vacant employment land total have been approved for Industries on Private Services in York Region. Lower densities and thus less employment can be expected on these lands.
6. Excluding encumbered lands and Industries on Private Services combined reduces the York Region vacant employment land total by over 1,000 hectares (2,475 acres), to 1,892 net hectares (4,676 net acres).
7. Approximately one quarter of vacant employment land is within a half-kilometre of a 400 Series Highway. This share, and total number has decreased since 2005 when 32% of the total supply was within a half-kilometre of a 400 Series Highway. Over three-quarters of all vacant lands are within five kilometres of a 400 Series Highway.
8. Based on a preliminary analysis, there is a relatively small amount of built under-utilized parcels that could be intensified totalling 186 net hectares (459 net acres).

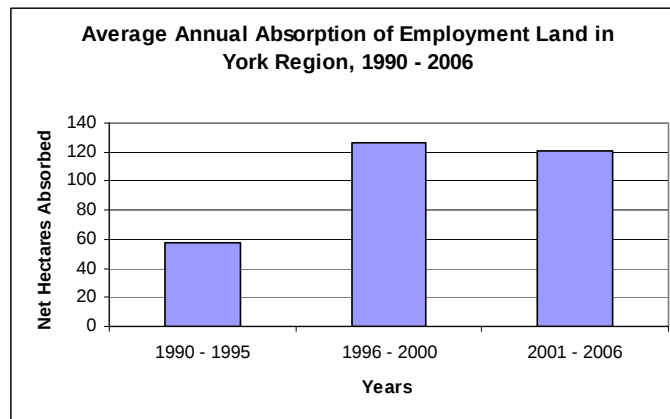
4.2 Supply of Employment Lands

From January 1, 2005 to July 1, 2006, 184 net hectares (455 net acres) of vacant employment lands were absorbed in York Region. This absorption includes all lands that were built for employment uses and discounts lands that were redesignated for non-

employment uses. The annual absorption from mid-year 2001 to mid-year 2006 was 120 hectares (297 net acres), a slight increase over the 119 net hectares (205 net acres) absorbed annually from July 2001 to December 2004. As seen in *Figure 1* below, the 2001-2006 rate is slightly lower than the rate recorded from 1996 to 2000. The current absorption rate has moderated slightly since the 1996-2000 period of 126 hectares annually (312 acres), which saw a steady climb each year over the absorption rate of the early 1990's.

Note: Net vacant employment land excludes non-employment uses within employment areas, such as roads, railways, residential properties, and open space. For unsubdivided vacant parcels, net figures were derived from application data. For large parcels with no application, net area was assumed to be 80% of the gross area.

Figure 1



Source: York Region Planning and Development Services Department, 1993 – 2007.

Historical information obtained from area municipal economic development offices and/or planning departments.

A more detailed technical methodology for this 2006 update has resulted in more accurate data. Two employment areas were also added for 2006; Highway 404 North and Rodick Road. These two new employment areas in Markham total 142 net hectares (351 net acres) of vacant employment land. Several employment areas were removed since they have primarily retail/commercial uses, and boundary adjustments occurred in existing employment areas.

Figure 2

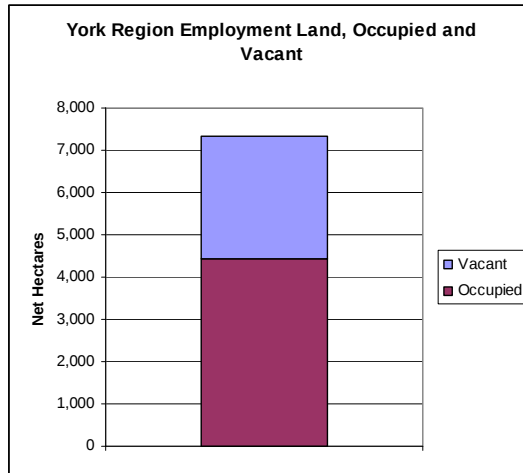
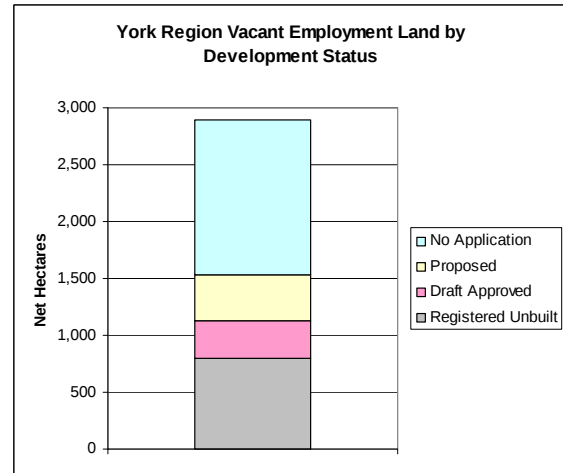


Figure 3



Source: York Region Planning and Development Services Department, 2007.

As of July 1, 2006, the total supply of vacant employment land in York Region is approximately 2,894 net hectares (7,151 net acres). This is relatively unchanged from the previous reporting period, approximately 1% higher than the 2,862 net hectares (7,073 net acres) reported in 2005. *Figure 2* illustrates that 39% of employment lands are currently vacant, while 61% are occupied.

Table 1

York Region Vacant Employment Land Inventory: Planning Status, July 1, 2006

Municipality	Registered Unbuilt ¹		Draft Approved ²		Proposed ³		No Application ⁴		Total	
	Hectares	Acres	Hectares	Acres	Hectares	Acres	Hectares	Acres	Hectares	Acres
Aurora	76	189	15	38	23	57	22	53	137	337
East Gwillimbury	77	189	24	59	0	0	240	593	340	841
Georgina	0	0	36	89	10	25	62	153	108	268
King	52	129	0	0	9	23	35	86	96	237
Markham	144	357	54	133	62	154	218	539	479	1,183
Newmarket	36	90	0	0	0	0	23	57	59	147
Richmond Hill	111	275	32	79	30	75	36	90	210	519
Vaughan	240	592	141	347	194	478	695	1,718	1,269	3,136
Whitchurch-Stouffville	63	156	26	64	72	178	35	85	196	483
York Region	800	1,977	328	810	400	989	1,366	3,375	2,894	7,151

Source: York Region Planning and Development Services Department, October 2007.

1. Vacant lots in registered plan of subdivision that are unbuilt

2. Proposed lots in a plan of subdivision, which received draft plan approval, but not final approval

3. Potential lots in a plan of subdivision, which have been applied for but have not received draft approval

4. Those areas that have approved official plan designations, but do not have a plan of subdivision application.

Note: All figures are recorded in net hectares and net acres.

The supply of registered and draft approved employment land in York Region is 1,127 net hectares (2,787 net acres). Registered and draft approved employment lands are the portion of the inventory which is readily available for development.

The City of Vaughan possesses the largest supply of vacant employment land at 1,269 net hectares (3,136 net acres), while the Town of Newmarket has the smallest supply at 60 net hectares (147 net acres) (*Table 1*).

Staff are currently in the process of updating the supply/demand analysis for employment land based on the Provincial forecasts, and will report to Council shortly with the results.

In order to continue to attract high quality employers to the Region, it is important that the Region offers a diverse and quality selection of employment lands with a wide variety of size, location and accessibility. The Region should provide a flexible and varied supply of vacant lands in order to respond quickly to changing economic circumstances.

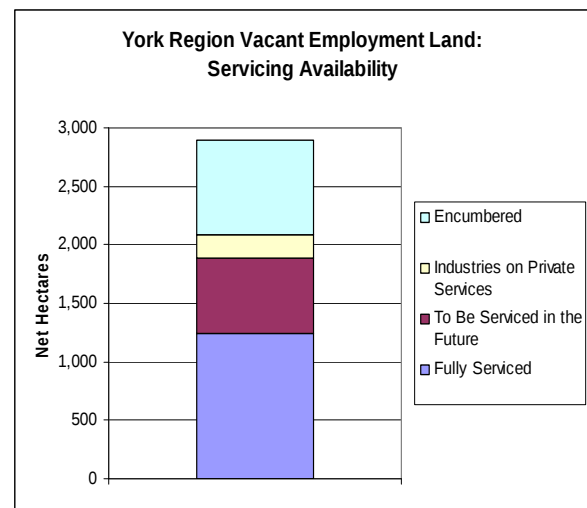
While the current supply of employment land should be able to readily serve the short-term, there are long-term issues in some municipalities. Aurora, Newmarket and Richmond Hill are approaching complete build out. Newmarket in particular is the only municipality without any active proposed or draft approved plans for employment lands. The City of Vaughan continues to dominate the long-term supply of vacant lands, with 48% of the total net inventory (1,269 net hectares or 3,136 net acres). However, nearly half of the Vaughan total is currently encumbered, pending the completion of the Highway 427 extension studies.

Figure 4

4.2.1 Availability of Lands for Development

One determining factor in an employment land site selection process is the provision of necessary infrastructure. Fully serviced parcels allow for more immediate development of a site whereas unserviced parcels present restrictions. Encumbered parcels are currently constrained from being developed in the near future. Parcels of land that have been approved for Industries on Private Services (IPS) are not precluded from development; they just cannot sustain the same level of employment density on stand-alone servicing as those lands with full services.

Figure 4 displays the Region's vacant employment land supply by servicing availability, illustrating encumbered lands, lands approved for industries on private services, lands to be serviced in the future, and lands currently fully serviced. *Attachment 2* further geographically illustrates servicing availability by municipality.



Source: York Region Planning and Development Services Department, 2007.

Of the total inventory, approximately 1,240 net hectares (3,064 net acres), or 43%, are presently fully serviced with water and wastewater. A further 652 net hectares, or 23% of the inventory are not currently serviced; however, it is the Region's intention to service them in the future.

Lands are considered unserviced if lacking water services, wastewater services, or both. These lands are otherwise not encumbered, not planned for IPS and are intended to be fully serviced in the future, either through extension of regional services or local provision. Note: Unserved lands include parcels in the following employment areas; Wellington/404 in Aurora; Holland Landing in East Gwillimbury; Keswick West in Georgina; King City, Nobleton & Schomberg in King; Box Grove, Cathedral & Highway 404 North in Markham; Barker Business Park & Headford in Richmond Hill; and West Woodbridge in Vaughan.

Nearly one third of the total inventory has development constraints in the short to medium term. Approximately 628 net hectares in west Vaughan are encumbered until the route of the Highway 427 extension is determined. Encumbered employment areas in west Vaughan are Elder Mills, Huntington East, Huntington West and Nashville. Similarly, approximately 182 net hectares in the Queensville Employment Area are encumbered pending the Highway 404 extension and the provision of wastewater services. In total, 810 net hectares (2,002 net acres), or 28% of the regional total are encumbered in some fashion.

Approximately 7% of the inventory or 191 net hectares (473 net acres) have been approved for industries on private services. These lands are located in the municipalities of East Gwillimbury, Georgina, King and Whitchurch-Stouffville. *Table 2* below illustrates the current servicing availability of net vacant employment land in York Region.

Table 2
York Region Vacant Employment Land Inventory: Servicing Availability

Servicing Availability	Supply		
	Hectares	Acres	% Total
Fully Serviced	1,240	3,064	43%
To Be Serviced in the Future	652	1,612	23%
Industry on Private Services	191	473	7%
Encumbered Lands	810	2,002	28%
York Region Vacant Employment Lands	2,894	7,151	100%

Source: York Region Planning and Development Services Department, 2007.

4.2.2 Parcel Size

A stock of vacant employment land that varies in size addresses the potential needs of a variety of employers. Currently, 36% of the total number of vacant parcels in the inventory are less than 1 hectare. The total supply of these smaller parcels amounts to 134 net hectares (332 net acres), or 5% of the inventory. Conversely, 11% of the total number of parcels are greater than 10 hectares. The total supply of these larger parcels amounts to 1,528 net hectares (3,776 net acres), or 53% of the inventory (*Table 3*).

Table 3
York Region Vacant Employment Land Inventory: Site Size Profile

Site Size Range (Hectares)	Supply				
	Parcels		Total Size		
	Number	Inventory Share	Hectares	Acres	Inventory Share
Less Than 1	260	36%	134	332	5%
1 to 10	376	52%	1,232	3,044	43%
Greater Than 10	82	11%	1,528	3,776	53%
Total	718	100%	2,894	7,151	100%

Source: York Region Planning and Development Services Department, 2007.

Approximately 32% of the parcels greater than 10 hectares are currently encumbered, while 20%, or 16 parcels, are currently registered unbuilt. Parcels still in the draft approved and proposed stage may potentially be subdivided into parcels smaller than 10 hectares. The supply of parcels greater than 10 hectares by municipality is illustrated in *Table 4* below.

Table 4
York Region Vacant Employment Land Inventory: Distribution of 10+ Ha Sites

Municipality	Supply of Parcels Greater Than 10 Hectares				
	Parcels		Total Size		
	Number	Inventory Share	Hectares	Acres	Inventory Share
Aurora	4	5%	65	161	4%
East Gwillimbury	11	13%	223	552	15%
Georgina	5	6%	61	151	4%
King	3	4%	71	175	5%
Markham	10	12%	163	403	11%
Newmarket	1	1%	11	27	1%
Richmond Hill	6	7%	132	327	9%
Vaughan	36	44%	692	1,709	45%
Whitchurch-Stouffville	6	7%	110	271	7%
York Region	82	100%	1,528	3,776	100%

Source: York Region Planning and Development Services Department, 2007.

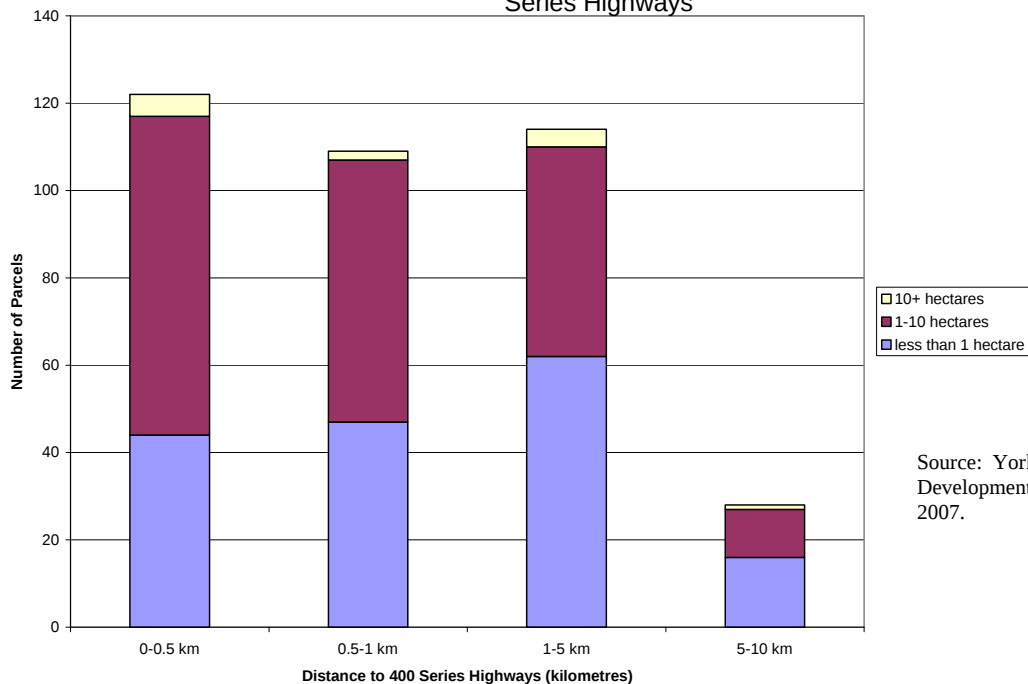
4.2.3 Accessibility

Employment areas should be strategically located within urban areas near major transportation corridors. This allows for the efficient transport of goods and access by employees.

Seven hundred and sixty-four (764) net hectares (1,889 net acres) of the vacant employment land inventory are within half a kilometre of existing 400 Series Highways. This represents 26% of the total supply, and is a 16% decrease over the 2005 inventory, when 913 hectares of the total supply was within half a kilometre of existing 400 Series Highways. Prime industrial locations continue to be absorbed faster than new employment lands near 400 Series Highways can be added to the inventory. Two thousand, two hundred and thirty (2,230) net hectares (5,511 net acres) of the inventory are within five kilometres of existing 400 Series Highways, which is 77% of the total supply. The vacant employment lands in East Gwillimbury and Vaughan that are encumbered are currently greater than one kilometre from a 400 Series Highway. However, these areas will become more accessible once Highway 404 is extended into the Queensville area and Highway 427 is extended into the west Vaughan area.

The 400 Series Highways are extremely important for employment lands from a strategic location and market accessibility point of view. The pressure to redesignate lands along these corridors to residential uses will continue to be great. Additionally, there is increasing pressure to redesignate these lands to allow for non employment land uses such as large scale big box retail development. It is important to ensure these strategically located lands are preserved for employment uses in the long term.

Figure 5 Fully Serviced & Registered/Draft Approved Vacant Land by Size & Proximity to 400 Series Highways



Source: York Region Planning and Development Services Department, 2007.

Figure 5 combines the key elements pertaining to the suitability of vacant land; planning status, the provision of water and wastewater services, the size of the parcel, and the accessibility of the parcel to the 400 Series Highways. Included are only fully serviced, registered or draft approved vacant parcels (i.e. available in the short-to-medium term). These 373 parcels Region wide are categorized by parcel size, and by distance from 400 Series Highways. Sites that are 10+ hectares in size within a half kilometre of a 400-series Highway, total five parcels, making up approximately one percent of the total number of fully serviced and available parcels. The largest single category is 1-10 hectare sites within a half-kilometre of the 400 Series Highways (73 total parcels).

4.2.4 Employment Intensification Opportunities

While there are no employment-specific intensification targets set out in *Places to Grow*, intensification of employment and population is identified to accommodate a significant portion of new growth. Intensification in existing employment areas could help accommodate some of the 340,000 additional jobs forecasted to locate in York Region by 2031. Redevelopment, infill development, the expansion or conversion of existing buildings, and the development of underutilized lots within previously developed areas are several intensification options. A scan of potential areas for intensification was undertaken. Built underutilized parcels were the main option investigated, while other potential opportunities are also noted.

4.2.4.1 Intensification through Underutilized Parcels

One opportunity for intensification within employment areas is the development of underutilized lots within developed areas (e.g. vacant portions of built parcels). Based on a preliminary investigation into potential built underutilized land, a parcel was included as built underutilized if it was approximately half vacant, or if the vacant portion of a built parcel was approximately a half-hectare or greater. The list of potentially built underutilized land was 85 parcels. The total area of the underutilized portions of those parcels was 186 hectares (459 acres).

Figure 6
Underutilized Parcel Example, 2002



Figure 7
Underutilized Parcel Example, 2006



Produced by: Planning and Development Services Department. © J. D. Barnes Limited, 2005 & 2006 Orthophotography.
Please Note: This is not a Plan of Survey. For actual measurements of the parcels, refer to legal survey and documents.

Figure 6 and Figure 7 above show a historical example of how an underutilized employment land parcel has been further developed. The parcel shown is in the Markham employment area of Denison Steeles, and is a pharmaceutical manufacturing facility. The total parcel size is approximately 2 hectares, and approximately half the site was previously underutilized. In 2004, a \$1.9 million expansion added the second attached building, totalling 2,733 square metres (29,418 square feet). Refer to *Attachment 3* for further examples of air photos illustrating built underutilized parcels in York Region municipalities.

Table 5 shows that if the underutilized total were included as part of the vacant inventory, the vacant inventory would increase by 6%.

Table 5
York Region Vacant Employment Land Inventory: Intensification Potential
through Underutilized Parcels

Municipality	Net Vacant Land (Ha)	Built Under-Utilized (Ha)	% Increase to Vacant Inventory
Aurora	137	11	7.8%
East Gwillimbury	340	20	6.0%
Georgina	108	3	2.9%
King	96	18	18.5%
Markham	479	19	4.0%
Newmarket	59	15	25.2%
Richmond Hill	210	9	4.5%
Vaughan	1,269	81	6.4%
Whitchurch-Stouffville	196	10	5.0%
York Region	2,894	186	6.4%

Source: York Region Planning and Development Services Department, 2007.

4.2.4.2 Other Intensification Options

Another option suggested in *Places to Grow* to accommodate intensification is redevelopment, or the creation of new units of lots on previously developed land in existing communities. Currently, there are three active applications to redevelop existing employment land parcels – one in Vaughan and two in Markham, totalling 27.5 hectares. Also in the future, Buttonville Airport will be redeveloped for employment land. Redevelopment can also include brownfield sites. The Provincial Policy Statement identifies brownfield sites as undeveloped or previously developed properties that may be contaminated. They are usually, but not exclusively, former industrial or commercial properties that may be underutilized, derelict, or vacant. More analysis is required to determine the intensification potential through redevelopment opportunities, including brownfields in York Region.

4.3 Summary Analysis

Key findings from the analysis presented above include:

- The average annual absorption rate from 2001 and 2006 is 120 hectares (304 acres).
- The total vacant employment land supply in York Region is 2,894 net hectares (7,151 net acres), up slightly from the 2005 total of 2,862 net hectares (7,073 net acres).
- The supply of registered and draft approved employment land in York Region is 1,127 net hectares (2,787 net acres).
- Approximately 28% of the Region's vacant land supply, or 810 net hectares (2,002 net acres), is currently encumbered in west Vaughan and Queensville.

- 191 net hectares (473 net acres), or 7% of the regional vacant employment land total have been approved for Industries on Private Services. These lands can be expected to accommodate less employment than regionally-serviced lands.
- Excluding both encumbered lands and Industries on Private Services reduces the York Region vacant employment land total to 1,892 net hectares (4,676 net acres).
- Approximately 26% of vacant employment land is within a half-kilometre of a 400 Series Highway and approximately 77% of all vacant lands are within five kilometres of a 400 Series Highway.
- There is a shortage of serviced and available large lots in the Region, with only 12 parcels above 10 hectares in size which are fully serviced and either draft approved or registered.
- A relatively small amount of employment lands throughout the Region could be intensified, totalling 186 net hectares (459 net acres).
- The threat of conversions of employment land to non-employment uses continues to be an issue.

4.4 Next Steps

It is the Region's intention to continue to update the Vacant Employment Land database, utilizing the Region's Growth and Development Information Management System and Geographic Information Systems. An up to date Vacant Employment Land Inventory will continue to be an integral component of York Region's growth management work for monitoring development and the pace of growth, thereby allowing for better supply management decisions and more regular reports to Council.

A series of further reports on employment in York Region are being prepared:

1. An Employment Area Analysis report, including discussion of employment densities and sectoral analysis.
2. An update to the demand/supply analysis for employment land will be based on new employment forecasts for York Region.
3. A final report will combine the supply/demand analysis to update land budget needs and discuss policy implications.

4.5 Relationship to Vision 2026

The York Region 2006 Vacant Employment Land Inventory supports the Vision 2026 goal of maintaining managed and balanced growth by addressing the action area of taking a strategic approach to growth management. By producing an inventory of the total supply of vacant employment lands, we are better able to plan for future demand.

5. FINANCIAL IMPLICATIONS

Employment lands play a central role in the Region's economy. The availability of a wide range of vacant employment lands is integral to the fiscal health of a community and can directly affect economic development and diversification of the assessment base.

Updating the Vacant Employment Land Inventory has been completed by staff within the approved budget for York Region's Planning and Development Services Department.

6. LOCAL MUNICIPAL IMPACT

Vacant employment lands from each of the nine area municipalities of York Region are identified and analyzed in this report. Staff from the local municipalities provided comment on the last full inventory, in 2005. For this report, municipal staff provided input on employment area boundary changes since the previous update. When the supply/demand projections are updated to account for the updated provincial employment forecasts, further consultations with the local municipalities will be required.

7. CONCLUSION

The total supply of net vacant employment land, the absorption rate, and encumbered land remain relatively unchanged from the 2005 update.

While the addition of vacant land in newly designated employment areas helped maintain the regional total supply, these additions were countered by reductions to existing employment areas. Stronger policies to prevent the redesignation of employment lands to non-employment uses would help ensure a healthy supply mix of vacant employment land.

Long-term supply issues still remain, as Vaughan accounts for nearly half the Regional total of vacant employment land. Of that Vaughan total, nearly half of it is currently encumbered pending the Highway 427 extension. The local municipalities of Aurora, Newmarket, and Richmond Hill are approaching complete build-out of employment lands.

The total of all encumbered lands in west Vaughan and Queensville, combined with the lower-density employment approved through development on private services, account for over 1,000 hectares (2,475 acres), or 35% of the vacant inventory total.

There is a limited supply of large lots readily available for development, and a limited supply of strategically located lands along the 400 Series Highways. Employment areas need to be better planned and preserved to accommodate these important characteristics.

With significant employment growth expected in York Region (340,000 additional jobs by 2031), there is a need for a long term perspective in planning for employment lands.

Through a detailed tracking system of employment lands, supply can be monitored to ensure an adequate amount is available to accommodate growth.

Given the many economic and policy variables affecting the supply and absorption of employment land, continued monitoring and reporting of the employment land inventory is necessary.

For more information on this report, please contact Paul Bottomley, M.C.I.P., R.P.P., Manager, Growth Management, Economy and Information Research, Long Range and Strategic Planning Branch, at 905-830-4444 ext 1530 or Paul.Bottomley@york.ca.

The Senior Management Group has reviewed this report.

(The attachments referred to in this clause are attached to this report.)