

Summary of Highlights

The Vacant Employment Land Inventory report contains a number of key findings:

1. From June 1, 2001 to January 1, 2005 the average annual absorption rate of employment lands built for employment uses was 119 net hectares (295 net acres) region wide.
2. As of January 1, 2005 the total vacant employment land supply of designated lands amounted to 2,862 net hectares (7,073 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. Approximately one third of the total supply of vacant employment land is located in areas that are not available for development in the short to medium term. Approximately 682 net hectares (1,685 net acres) in west Vaughan are encumbered until the route of the Highway 427 extension is determined. Similarly, approximately 214 net hectares (528 net acres) in the Queensville Employment Area are encumbered pending the Highway 404 extension and the expansion of wastewater services into the area. In total, 896 net hectares (2,213 net acres) are encumbered in some fashion.
4. The total net supply of vacant employment land less the encumbered lands equals 1,966 net hectares (4,860 net acres).
5. A further 212 net hectares (524 net acres) of vacant employment land is approved only for development on private services.
6. The supply of all vacant employment lands in York Region represents an approximate 18.5 year supply. Excluding encumbered lands and lands approved for industry on private services the supply amounts to 1,754 net hectares (4,336 net acres), or an 11.8 year supply.
7. The portion of vacant employment land in registered and draft approved plans of subdivision is 856 net hectares (2,114 net acres).
8. Of the total inventory, approximately 982 net hectares (2,426 net acres), or 30% are presently fully serviced with water and wastewater facilities supplied by the Region.
9. Forty-five percent (45%) of the total number of vacant parcels in the inventory are less than 1 hectare in size. The total supply of these smaller size parcels amounts to 187 net hectares (462 net acres). Ten percent (10%) of the parcels are greater than 10 hectares. The total supply of these larger size parcels amounts to 1,488 net hectares (3,676 net acres).
10. Of the total inventory, 913 net hectares (2,255 net acres) are within half a kilometre of existing 400 Series Highways, representing 30% of the total supply. A total of 2,207 net hectares (5,454 net acres), or 77% of the total supply, are within 5.0 km of existing 400 Series Highways.

1.0 Introduction

1.1 Background

In 2001 a comprehensive up-to-date regional inventory of the supply and demand of employment lands was created. In 2002 a brief update was compiled. The 2005 Vacant Employment Land Inventory is the first extensive update to the 2001 inventory.

This update to the Vacant Employment Land Inventory is current to January 1, 2005. It is the Region's intention to continue to update the Vacant Employment Land database on an ongoing basis.

The key objectives of the vacant employment land inventory include the following:

- To provide an inventory of the supply of vacant employment land.
- To provide data on the rate of employment land consumption.
- To provide a supply/demand analysis.
- To identify the quality of vacant employment land.
- To identify employment land development trends.
- To provide a basis for reviewing Regional Official Plan policies.
- To provide a basis for comment on recent Provincial initiatives.
- To attract investment to the Region.

A current, integrated and detailed tracking system of employment lands provides an up to date picture of consumption patterns and trends. This type of information allows for better supply management decisions, and for the close monitoring of development within employment districts.

Economic vitality is one of the key themes of the Regional Official Plan. The provision of a broad array of vacant employment lands aids communities in achieving economic development objectives and bolsters the fiscal health of a community by expanding and diversifying the assessment base.

The *Provincial Policy Statement* also emphasizes that an appropriate mix and range of employment should be provided to meet long term needs.

It is anticipated that an up to date Vacant Employment Land Inventory will be an integral component of York Region's growth management system for monitoring the pace of growth, thereby allowing for more regular reports.

1.2 Definitions

Employment Lands 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 lands referred strictly to districts dedicated to industrial land uses. Changes in the economy have altered the function of employment lands to include a broader range of uses. In addition to traditional manufacturing and industrial activities, employment lands now include commercial, business, personal service, and industrial support activities.

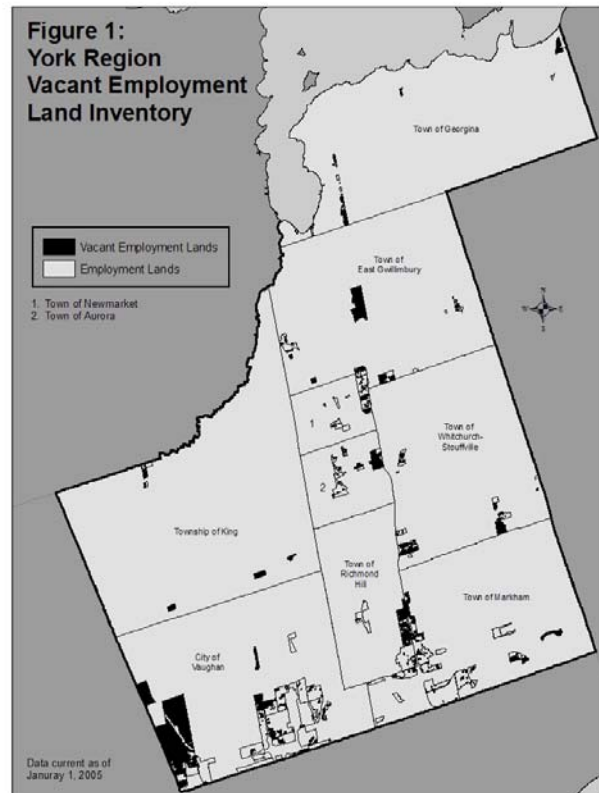
Vacant employment lands refer to vacant parcels of land in designated employment lands, as well as those lands in rural areas that have received approval for industry on private services¹. Isolated parcels in the rural area that are outside designated employment lands are not included in the inventory. Mixed use areas such as the Vaughan Corporate Centre, Markham Centre, Bayview Glen in Richmond Hill and the Whitchurch-Stouffville live-work area have not been captured. The 2005 inventory also does not include the North 404 Employment Area in Markham which was recently approved by Council, nor the Buttonville Airport.

Included in the Vacant Employment Land Inventory:

- *Registered plans of subdivision (unbuilt).*
- *Draft Approved plans of subdivision.*
- *Pending applications that lie within an approved official plan designation.*
- *Approved official plan amendments as of January 1, 2005.*

Not Included in the Vacant Employment Land Inventory

- *Isolated employment lands outside designated employment areas (i.e. industrial use on a single lot in a rural area).*
- *Mixed use areas such as the designated live/work lands of the Stouffville Secondary Plan, or the Regional Centres such as Vaughan Corporate Centre, Richmond Hill Centre, Markham Centre, and Newmarket Centre.*



¹ Industry on private services are serviced by individual, autonomous water supply systems that are owned, operated and managed by the owner of the property upon which the system is located.

- *Existing buildings that are vacant.*
- *Vacant parcels (generally small in size) that may be developed through infilling or redevelopment.*
- *Sites with existing employment buildings that could be expanded.*
- *Areas covered by local official plan amendments, which have not been given final approval as of January 1, 2005.*
- *Buttonville Airport.*

1.3 Sources of Data

The Region's Vacant Employment Land Inventory was updated in conjunction with the local municipalities, using a broad range of sources. The sources of data used to compile this update included the 2001 Vacant Employment Land Inventory, the provincial assessment database (OASYS), plan of subdivision applications, local vacant employment land inventories, local official plans, local official plan amendments, local secondary plans, and 2002 aerial photographs.

1.4 Internet Mapping

Included in Appendix Two of this publication are reference maps for each of the nine local municipalities. These reference maps display the locations of all employment lands as well as the vacant parcels within the employment lands. An internet address is provided with the reference maps. When the user navigates to the specified internet address, site specific information such as planning status and parcel area for each of the vacant parcels of land is displayed.

2.0 Trends in York Region's Employment Lands

The absorption rate of vacant employment land during the mid 1980s was very strong due, primarily, to the strength of the provincial economy. Average annual absorption of employment land from 1981-1991 was 190 net hectares (470 net acres). The City of Vaughan accounted for an annual average of 100 net hectares (250 net acres) or 55% of total employment land, followed by the Towns of Markham with 24%, Richmond Hill 10%, Newmarket 6%, and Aurora at 5%. Data for the more rural municipalities of East Gwillimbury, Georgina, King and Whitchurch-Stouffville is not available for this time period.

The recession and subsequent restructuring of the early 1990s slowed vacant land absorption and created a higher vacancy rate in employment areas. This period also resulted in a rethinking and more efficient approach by the business community to the use of employment space as well as a more cautious approach to investment.

The global marketplace and the speed and intensity of technological innovation are transforming the Region's economy. Knowledge-based industries will continue to have a significant impact on future employment and will be key employment generators in the future of York Region. Since the 1980's, an increasing proportion of growth has come from the office sector, which includes:

information and cultural industries; finance, insurance and real estate; business services; and public administration. Recently, in addition to industrial and warehousing activities, non-traditional employment activities such as business and industrial support services, commercial (e.g. theatres, restaurants etc.) and retail warehouse operations have become more common in employment/business parks.

The manufacturing sector of employment is currently the dominate employer in the Region, with approximately 22%² of all employment.

From 1996-2001 York Regions economy witnessed strong employment growth: approximately 15,000 – 20,000 new jobs each year. With such a large increase in employment, the employment areas of York Region's five urban municipalities have once again experienced high levels of absorption with an average of 126 net hectares (312 net acres) per year.

Since 2001, the average annual absorption rate for all of York Region has slowed slightly from the 1996-2001 average for the five urban municipalities to an average of 119 net hectares (295 net acres) per year.

3.0 Supply of Vacant Employment Lands in York Region

3.1 Employment Categories

Typically employment is divided into three land use based categories:

- Major office employment is defined as employment in free standing office buildings 20,000 square feet or greater.
- Population related employment consists primarily of employment which serves the local population such as retail services, education services, municipal government services, social and community services, medical services and local office uses (local banks, local legal and accounting services).
- Employment land employment occurs in employment areas and includes such activities as manufacturing, research and development, wholesale warehousing, etc., and does not include employment already classified in the other two categories. This type of employment generally requires new vacant land for development.

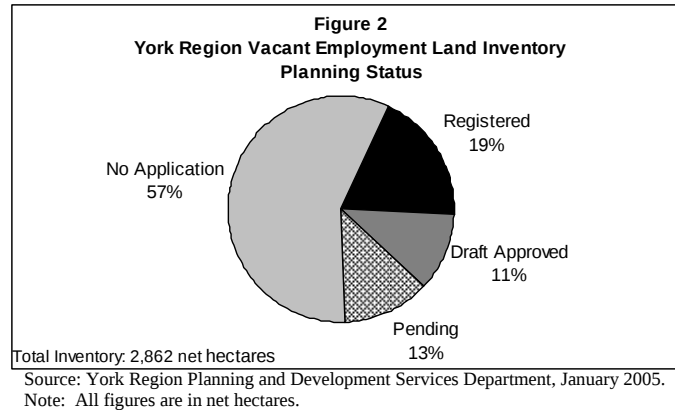
In the Region approximately 58% of our total employment occurs on employment lands. The 2001 inventory analyzes only the employment lands portion of the total employment.

² Statistics Canada, 2001 Census Canada, excluding "no fixed address" portion of total employment.

3.2 Overview of Current Supply

As of January 1, 2005 the total vacant employment land supply of designated lands amounted to 2,862 net hectares (7,073 net acres)³. 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 (figure 2).

All parcels of land in the Vacant Employment Land Inventory are in areas with an approved Official Plan designation. Figure Three illustrates the total supply by planning status. The following four categories were used to identify status:



Registered: Vacant lots in registered plans of subdivision that are unbuilt.

Draft Approved: Proposed lots in a plan of subdivision, which received draft approval but have not received final approval.

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

No Application: Those areas that have approved official plan designations, but do not have a plan of subdivision application.

³ Net employment area includes the private lands (lot area) that support employment uses and excludes non-employment land uses such as roads, highways and open space. Net figures are derived from the assessment database where applicable. For large parcels net area was assumed to be 80% of the gross area.

Figure 3
York Region Vacant Employment Land Inventory
Planning Status

Municipality	Registered		Draft Approved		Pending		No Application		Total	
	Hectares	Acres	Hectares	Acres	Hectares	Acres	Hectares	Acres	Hectares	Acres
Aurora	30	75	54	134	45	111	35	86	164	405
East Gwillimbury	84	209	23	57	0	0	243	600	350	865
Georgina	0	0	0	0	1	2	126	312	127	314
King	2	4	0	0	12	29	84	209	98	242
Markham ⁵	97	239	52	130	57	140	50	124	256	633
Newmarket	21	52	27	67	0	0	27	68	76	187
Richmond Hill	86	213	0	0	0	0	135	334	221	547
Vaughan	185	457	147	364	149	368	886	2,188	1,367	3,377
Whitchurch-Stouffville	35	86	12	29	96	238	61	151	204	503
York Region	540	1,335	316	780	359	888	1,647	4,071	2,862	7,073

Source: York Region Planning and Development Services Department, January 2005.

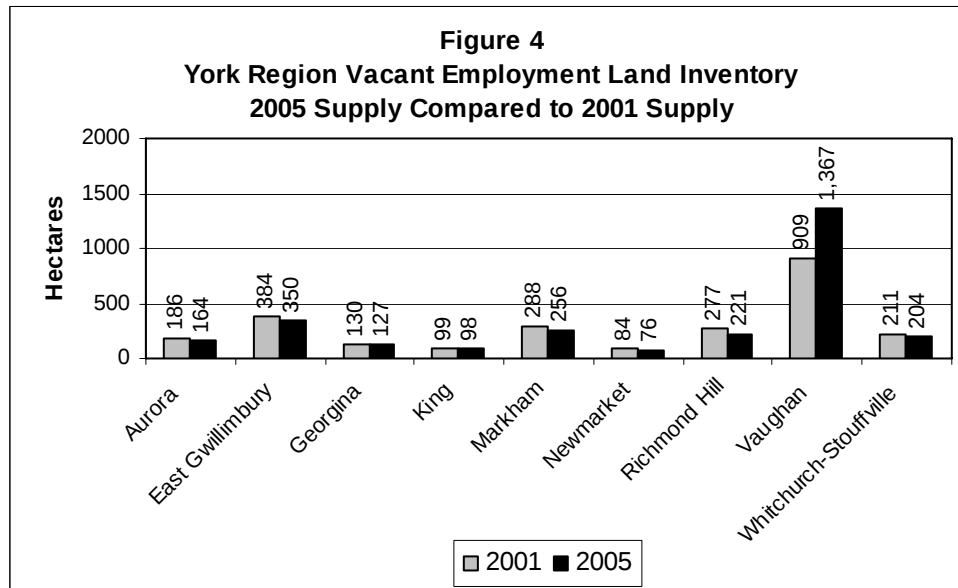
Note: All figures are recorded in net hectares/acres.

3.3 2005 Vacant Employment Land in Relation to 2001 Supply

As of January 1, 2005 the total vacant employment land supply of designated lands amounted to 2,862 net hectares (7,073 net acres).

As of June 1, 2001 the total vacant employment land supply of designated lands was 2,691 net hectares (6,662 net acres).

The current 2005 inventory includes 11.5% more vacant employment lands than the 2001 inventory. It is notable that the vast majority of the increase in the inventory is found in the municipality of Vaughan (figure 4). The remaining eight municipalities have experienced minor changes in the overall supply.



Source: York Region Planning and Development Services Department, January 2005.

Note: All figures are in net hectares.

The municipalities of Markham, Newmarket and Vaughan experienced high absorption rates and replenished their supply of vacant employment lands by adding new employment areas to the inventory, thus maintaining the overall supply.

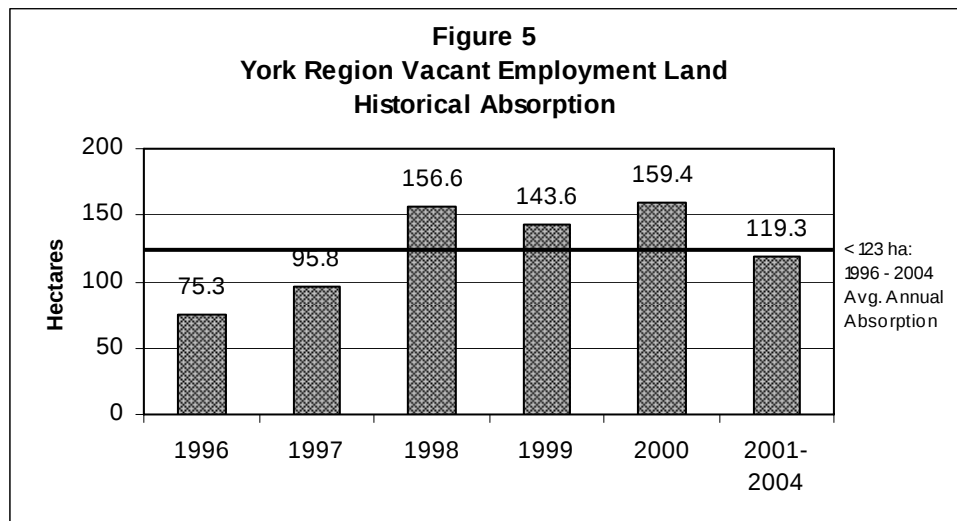
Alternatively, the municipalities of Aurora, King and Whitchurch-Stouffville experienced lower absorption rates relative to their overall supply, and did not add additional employment lands to their inventory.

4.0 Absorption

4.1 Employment Land Absorption

Employment land absorption refers to all lands that were built for employment uses and discounts lands that were redesignated for non-employment uses.

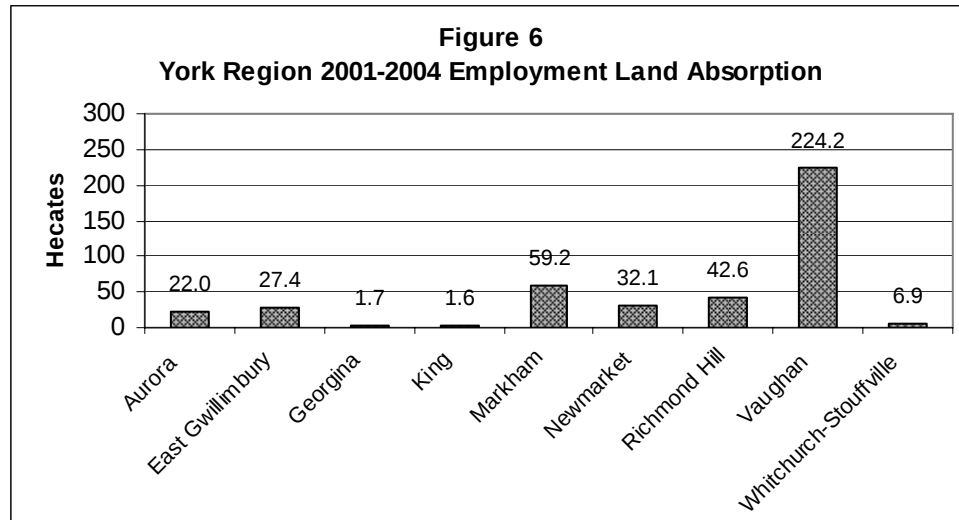
The average annual absorption of employment lands from June 1, 2001 to January 1, 2005 was 119 net hectares (295 net acres). This average annual absorption rate was less than that experienced in the preceding three year period from 1998 to 2000, which was 153 net hectares (378 net acres) a year. The overall average annual absorption from 1996 to 2004 was 123 net hectares (304 net acres) a year (figure 5).



Source: York Region Planning and Development Services Department, January 2005.
1996 – 2000 data for the urban municipalities (Aurora, Markham, Newmarket, Richmond Hill, Vaughan).
2001 – 2004 data represents the aggregate average annual absorptions of all nine municipalities in York Region.
Note: All figures are in net hectares.

From June 1, 2001 to January 1, 2005 a total of 418 net hectares (1,032 net acres) of vacant employment land was absorbed (figure 6). In this three and a half year period, the City of Vaughan accounted for a total of 224 net hectares (554 net acres) or 54% of total absorption. Markham experienced the second highest absorption with 59 net hectares (146 net acres) or 14% of total absorption,

followed by Richmond Hill at 10%, Newmarket at 8%, and East Gwillimbury at 7%. The higher absorption rate in East Gwillimbury can be largely attributed to the development of a new York Region Operations Centre and Materials Recycling Facility in the Bales Drive Employment Area.

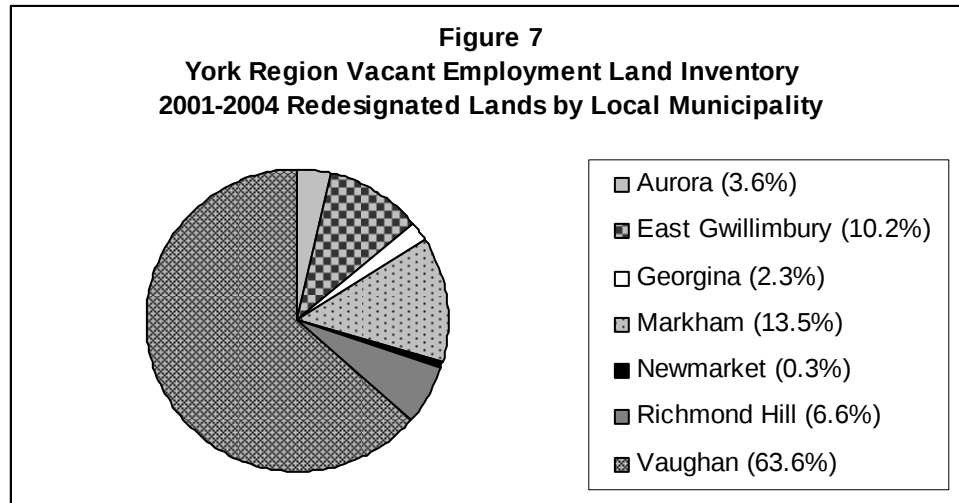


Source: York Region Planning and Development Services Department, January 2005.
Note: All figures are in net hectares.

From June 1, 2001 to January 1, 2005 new construction has been primarily concentrated in the southern part of York Region (Vaughan, Richmond Hill and Markham). The opening of Highway 407 has contributed significantly to the surge in economic activity within southern York Region, providing commuters and industry with a quick and easy transportation route through one of the more congested parts of the Greater Toronto Area. The City of Vaughan in particular has benefited with a total absorption of 224 net hectares (554 net acres), due to its proximity to Pearson International Airport and major transportation corridors such as Highway 401, Highway 407, and Highway 427.

4.2 Vacant Employment Land Re-designations

Since 2001, some vacant employment lands have been redesignated to allow for non-industrial uses and thus have been removed from the employment area. From June 1, 2001 to January 1, 2005 approximately 61 net hectares (151 net acres) of vacant employment lands were redesignated from employment to other uses (figure 7).



Source: York Region Planning and Development Services Department, January 2005.
Note: All figures are in net hectares.

The redesignations displayed in figure seven can be attributed to the following:

Aurora: Residential redesignation in the Magna Employment Area (2.2 net hectares).

East Gwillimbury: Residential and Open Space redesignations in the Mount Albert Employment Area (1.9 net hectares residential, 4.3 net hectares open space).

Georgina: Residential redesignation in the Keswick Employment Area (1.4 net hectares).

Markham: Residential and Park Space redesignations in the Commerce Valley Employment Area (1.3 net hectares residential, 6.9 net hectares park space).

Newmarket: Residential redesignation in the Mulock North Employment Area (0.2 net hectares).

Richmond Hill: Residential redesignation in the Beaver Creek Employment Area (4.0 net hectares).

Vaughan: Commercial redesignation in the Vaughan 400 North Employment Area (38.7 net hectares).

5.0 Quality of Vacant Employment Lands

In order to continue to attract diverse and 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. Uncertainties in short

to medium term prospects for the economy indicate that the Region should provide a flexible and diverse supply of vacant lands in order to respond quickly to changing economic circumstances.

5.1 Availability of Vacant Employment Lands for Development

One of the main determining factors when assessing the supply of vacant employment land is the provision of necessary infrastructure.

5.1.1 Servicing Status

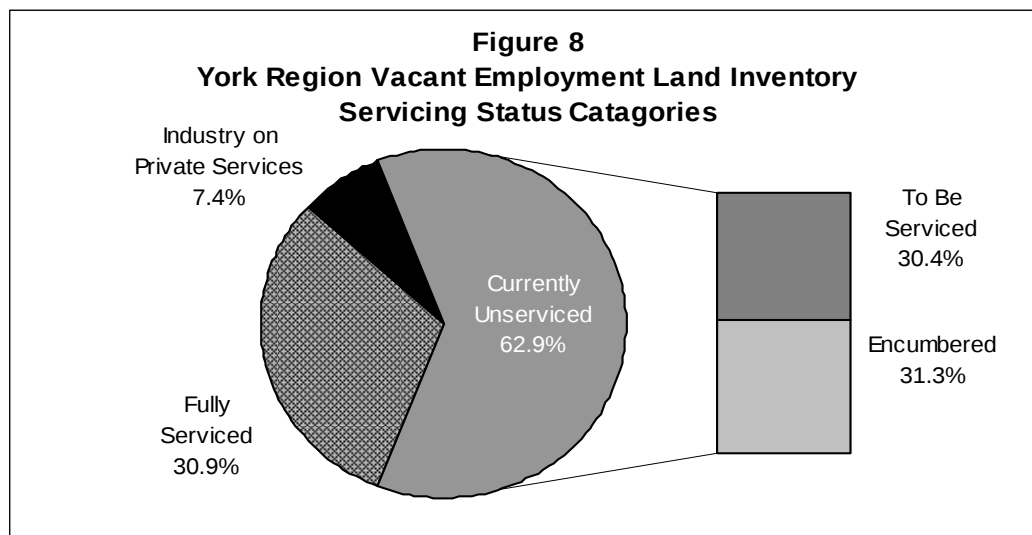
For the purposes of this analysis all parcels of vacant employment land have been categorized according to the degree of water and wastewater services available. The following four categories were used to identify level of servicing:

Fully Serviced: Parcels that are serviced by regional water and wastewater services. These parcels allow for more immediate development of a site whereas unserviced parcels present restrictions.

Unserviced: Parcels that are currently unserviced; however, it is the Region's intention to service them in the future.

Encumbered: Parcels that are currently unserviced and that are constrained from being developed in the short to medium term.

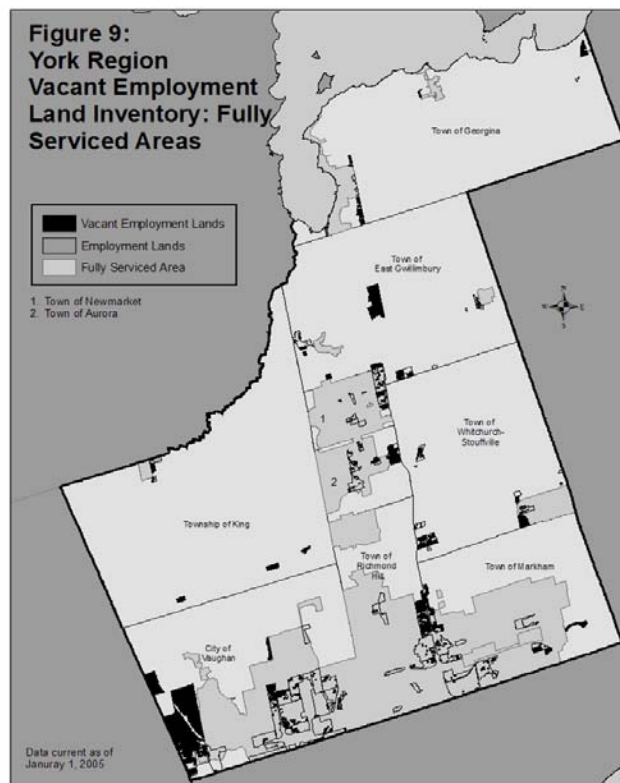
Industries on Private Services (IPS): Parcels of land that have been approved for individual, autonomous water supply systems that are owned, operated and managed by the owner of the property upon which the system is located. The type of industry that is sustainable on these parcels is restricted and provides less employment density than on regionally serviced parcels.



Source: York Region Planning and Development Services Department, January 2005.
Note: All figures are based on net areas.

5.1.2 Location of Vacant Employment Lands by Servicing Status

The majority of employment areas in the five urban municipalities (Aurora, Markham, Newmarket, Richmond Hill and Vaughan) are currently fully serviced by the York Durham Sewage System. Additionally, some of the employment areas in the towns and villages of the more rural municipalities (East Gwillimbury, Georgina, King and Whitchurch-Stouffville) are fully serviced by local production wells and treatment plants. The towns and villages that have regionally supplied local water and wastewater systems include Stouffville, Schomberg, Mount Albert and Sutton. Figure eight displays fully serviced vacant employment areas. Approximately 884 net hectares (2,184 net acres), or 31% of the total inventory is fully serviced with water and wastewater facilities supplied by the Region.



In the five urban municipalities unserviced parcels currently are found in new employment areas at the fringe of the urban boundary. It is the Region's intention to service these lands in the future. Furthermore, it is anticipated that most of the employment areas found in designated Town's and Villages will be serviced in the future. Of the total inventory, 871 net hectares (2,153 net acres), or 30% is not currently serviced.

Encumbered lands are found in the municipalities of Vaughan and East Gwillimbury. Approximately 682 net hectares (1,685 net

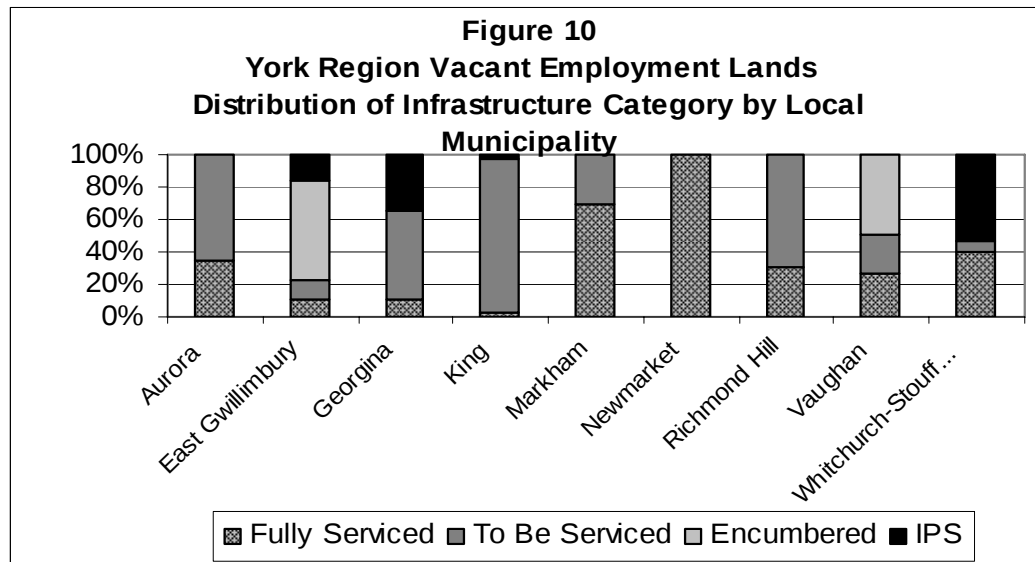
acres) in west Vaughan are encumbered until the route of the Highway 427 extension is determined. Similarly, approximately 214 net hectares (528 net acres) in the Queensville Employment Area are encumbered pending the Highway 404 extension and the expansion of wastewater services. In total, 896 net hectares (2,213 net acres), or 31% are encumbered in some fashion.

Parcels that have been approved for industry on private services are found in the more rural municipalities of East Gwillimbury, Georgina, King and Whitchurch-Stouffville. In total, 212 net hectares (524 net acres) have been approved for industry on private services. Approximately half of these lands are found in the

Cardico, Vandorf, and Gormley Employment Areas in the municipality of Whitchurch-Stouffville.

5.1.3 Local Municipal Distribution of Vacant Employment Lands by Servicing Status

The distribution of the servicing status categories within each municipality varies throughout the Region. The more rural municipalities of King and Georgina have the highest percentage of lands with no services with 97% and 89% unserviced respectively. Conversely, the more built-up municipalities of Newmarket and Markham have the highest percentage of lands with full servicing with 100% and 69% respectively. Encumbered lands have a significant impact on the local municipalities, accounting for 61% of East Gwillimbury's total supply and 50% of Vaughan's total supply.



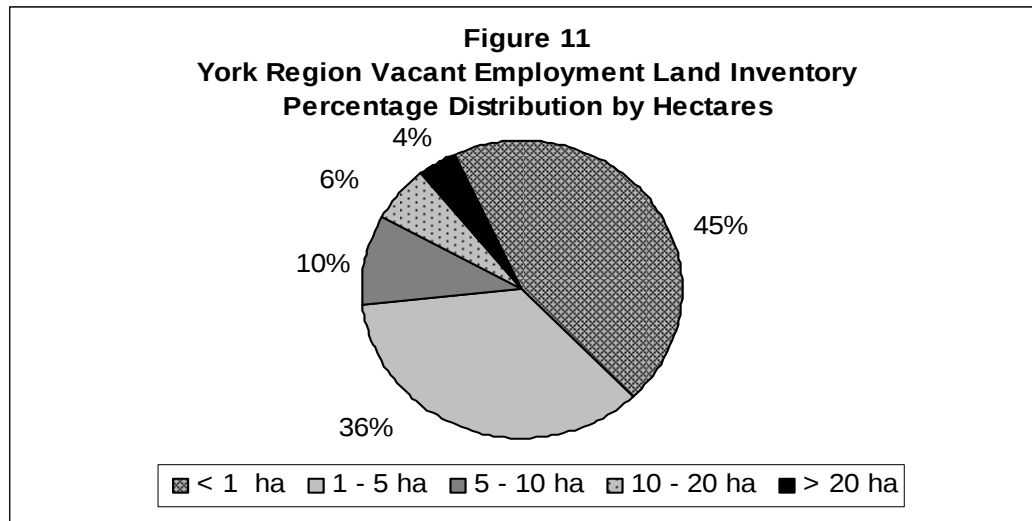
Source: York Region Planning and Development Services Department, January 2005.
Note: All figures are based on net areas.

The availability of servicing on vacant employment lands is a key determinant in assessing the ability of an area to attract desirable industry. When monitoring the supply of vacant employment lands, it is important to consider the short to medium term development potential. The vacant employment lands that currently have no services available will likely remain vacant and unproductive until servicing infrastructure is in place.

5.2 Site Size Profile

A stock of vacant employment land that varies in size allows for diverse investment opportunities. Different land uses and scales of operation require different parcel sizes.

Currently, 45% of the total number of vacant parcels in the inventory are less than 1 hectare in size. The total supply of these smaller parcels amounts to 187 net hectares (462 net acres), or 6% of the inventory. Conversely, 10% of the parcels are greater than 10 hectares. The total supply of these larger parcels amounts to 1,488 net hectares (3,676 net acres), or 52% of the inventory. Of these larger parcels, 38% are greater than 20 hectares. Of the total number of parcels greater than 20 hectares, approximately half are currently encumbered lands.

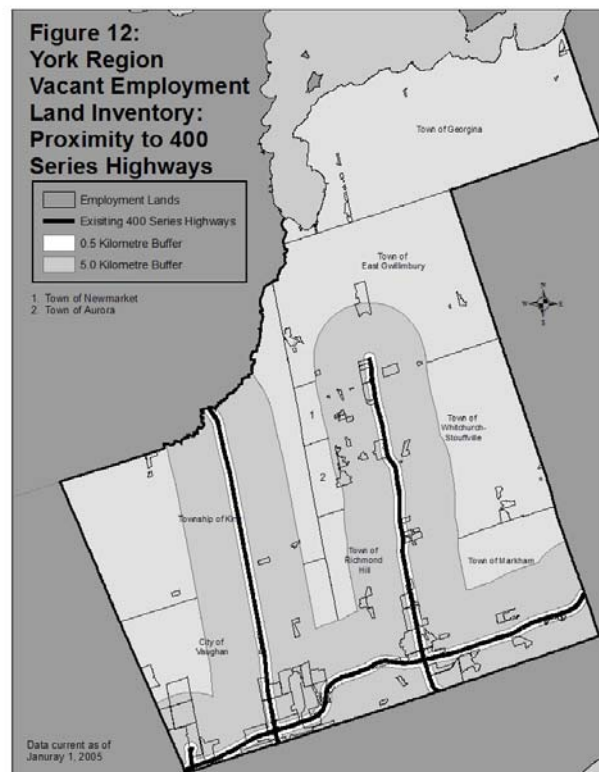


Source: York Region Planning and Development Services Department, January 2005.
Note: All figures are based on net areas.

5.3 Proximity to 400 Series Highways

Places to Grow, the Draft Growth Plan proposed by the Provincial Ministry of Infrastructure Renewal (PIR) states that employment areas should be strategically located within urban areas near major transportation corridors or with good access to the U.S. border. Accessibility to employment lands allows for the efficient transport of goods and people.

Nine and thirteen (913) net hectares (2,255 net acres) of the inventory of vacant employment land is within half a kilometre of existing 400 Series Highways. This is 30% of the total supply. Two



thousand, two hundred and seven (2,207) net hectares (5,454 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 have greater access once Highway 404 is extended into the Queensville area and Highway 427 is extended into the West Vaughan area.

5.4 Summary of Quality Analysis of Vacant Employment Lands

The suitability of any given parcel of vacant employment land for immediate development varies greatly depending on the parcels planning status, the provision of water and wastewater services, the size of the parcel, and the accessibility of the parcel in relation to the 400 Series Highways.

As outlined above, there is a wide variety of parcels within each of the categories of quality. More in depth analysis of the inter-relationships of the data regarding servicing, site size and site accessibility will be considered for the next update to the inventory.

Larger parcels that are fully serviced and adjacent to a 400 Series Highway are considered to be particularly desirable as there are fewer development constraints and they are able to accommodate larger corporations. Many of these prestige parcels are located in lands that are currently encumbered. It is important that the infrastructure constraints that are impacting the encumbered lands are dealt with in a timely manner.

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 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.

6.0 Supply/Demand Analysis

6.1 Employment Forecasts

In February 2005 the Draft Growth Plan proposed by the Provincial Ministry of Infrastructure Renewal (PIR) included an updated employment forecast to 2031 for all upper tier municipalities in the Greater Golden Horseshoe.

The updated employment forecast for York Region anticipates 740,000 jobs by 2026 and 780,000 jobs by 2031. The current Regional Official Plan forecast

anticipates 696,000 jobs will be located in the Region by 2026. Staff are currently working on distributing the updated Provincial forecast to the local municipalities. This work will be completed by the fall of 2005. When the updated Provincial forecast has been distributed to the local municipalities, staff will assess the supply of vacant employment lands at the local level.

The supply/demand analysis found in this report has been conducted at the Regional level only, using the Council approved Regional Official Plan 2026 forecast. When the updated Provincial forecast has been distributed to the local municipalities, staff will assess the supply of vacant employment lands at the local level.

6.2 Regional Analysis

The Regional Official Plan employment forecast to 2026 was used to calculate future demand for employment land in York Region. According to this forecast approximately 154,000 additional jobs will need to be accommodated on employment lands over the next 18.5 years.

The total supply of vacant employment land in York Region is 2,862 net hectares (7,073 net acres). This total supply of vacant employment lands will be able to accommodate employment land growth for approximately 18.5 years.

The 18.5 year supply of employment lands takes into account the net area of all vacant employment lands, regardless of planning status or servicing availability.

There are long term supply issues in some municipalities. Aurora, Newmarket and Richmond Hill are approaching complete build out. In addition, the City of Vaughan currently dominates the long term supply with 48% of the total inventory.

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. It is important to ensure these strategically located lands are preserved for employment uses in the long term.

Of the total supply of vacant employment lands, 896 net hectares (2,213 net acres) are currently encumbered and 212 net hectares (524 net acres) are approved for industry on private services. The supply of vacant employment land in York Region, excluding encumbered lands and lands approved for industry on private services is 1,754 net hectares (4,336 net acres), or a 11.8 year supply.

As of January 1, 2005 there are an estimated 250,000 jobs located on employment lands. The Regional Official Plan 2026 forecast anticipates that 404,000 jobs will be located on employment lands. This compares to 411,000

jobs for the updated 2026 Provincial forecast. Based on the Regional Official Plan forecast the total supply of vacant employment land will satisfy demand for approximately 18.5 years. Using the updated Provincial forecast the supply will be adequate for approximately 17.8 years.

7.0 Vacant Employment Land Overview by Local Municipality

7.1 Aurora

The total supply of vacant employment land in Aurora is 164 net hectares (405 net acres).

The supply of vacant employment land that is in a registered or draft approved plan of subdivision is 85 net hectares (209 net acres), or 52% of the local inventory.

The average annual absorption from June 2001 to December 2004 was 6.3 net hectares (15.5 net acres).

Of the total vacant employment lands available, approximately one third are fully serviced. The remaining two thirds are found in the new Wellington/404 Employment Area and will be serviced in the future.

7.2 East Gwillimbury

East Gwillimbury has 350 net hectares (865 net acres) of vacant employment lands. Of the total supply 107 net hectares (265 net acres), or 31% are in registered or draft approved plans of subdivision.

The average annual absorption from 2001 – 2005 has been 7.8 net hectares (19.4 net acres). This absorption rate is notably higher than what has historically been experienced and can be largely attributed to the development of a new York Region Operations Centre and Materials Recycling Facility in the Bales Drive Employment Area.

Of the total supply of vacant employment lands approximately 11% are fully serviced. Two hundred and fourteen (214) net hectares (528 net acres), or 61% of the local inventory, are currently encumbered from development; awaiting the extension of Highway 404 and the expansion of the York/Durham Sewage System to the Queensville Employment area.

East Gwillimbury has an adequate overall supply of vacant employment lands; however the efficient utilization of the encumbered lands is dependent on the provision of infrastructure. In the interim, while awaiting the provision of said infrastructure, it is important that the Queensville employment lands be maintained for employment uses.

7.3 Georgina

A total of 127 net hectares (314 net acres) of vacant employment lands are found in Georgina. Currently, none of the inventory is in draft approved or registered plans of subdivision.

Georgina has experienced a low average annual absorption of 0.49 net hectares (1.21 net acres) a year since 2001. It is anticipated that this rate will increase when Highway 404 is expanded to Georgina and the Bradford By-pass to Highway 400 is constructed.

Currently, 14 net hectares (35 net acres), or 11% of the local inventory are fully serviced and 44 net hectares (108 net acres), or 35% of the inventory are approved for industry on private services. The portion of the inventory that has been approved for industry on private services is located exclusively in the Pefferlaw Employment Area.

7.4 King

The total supply of vacant employment land in King is 98 net hectares (242 net acres). Two (2) net hectares (4 net acres), or 2% of the local inventory is in a registered or draft approved plan of subdivision.

From June 2001 to January 2005 the average annual absorption in King was 0.46 net hectares (1.14 net acres).

Currently, 3 net hectares (7 net acres), or 3% of the vacant employment lands are fully serviced with water and wastewater. These fully serviced parcels are located in Schomberg. Ninety-four percent (94%) of the total inventory in King is unserviced.

7.5 Markham

The Town of Markham has a total of 256 net hectares (632 net acres) of vacant employment land that were included in this analysis. In addition to these lands, the North 404 Employment Area and the Buttonville Airport lands have been approved for industrial uses. These two additional employment areas account for approximately 174 net hectares (465 net acres) of vacant employment land.

The supply of vacant employment land that is in a registered or draft approved plan of subdivision is 149 net hectares (369 acres), or 58% of the local inventory.

The average annual absorption of employment lands since the last inventory has been 16.9 net hectares (41.8 net acres). From 1996-2000 the average annual absorption was 30 net hectares.

Almost 70% of Markham's total inventory of vacant employment lands is fully serviced. The remaining portion of the inventory, found in the new employment areas at the urban fringe, will be serviced in the future.

7.6 Newmarket

Newmarket has 76 net hectares (187 net acres) of vacant employment land. This is the smallest local supply in the Region and accounts for only 2.35% of the total supply. The registered and draft approved portion of the inventory is 48 net hectares (119 net acres), or 64%.

The average annual absorption from 2001-2004 was 9.2 net hectares. This compares to an average of 5.8 net hectares per year from 1996-2000.

Newmarket is the only municipality in the Region with 100% of its vacant employment land inventory fully serviced.

7.7 Richmond Hill

A total of 221 net hectares (547 net acres) of vacant employment lands are found in Richmond Hill. The registered and draft approved portion of the inventory is 86 net hectares (213 net acres), or 39%.

From June 2001 to January 2005 the average annual absorption in Richmond Hill was 12.2 net hectares (30.0 net acres).

Of the total local inventory, 67 net hectares (165 net acres) are fully serviced with water and wastewater services. The remaining lands are not currently serviced, however it is anticipated that they will be serviced in the future. The unserviced lands are located in the newer Headford and Headford North Employment Areas.

7.8 Vaughan

The total supply of vacant employment lands in Vaughan is 1,367 net hectares (3,377 net acres). This is approximately 48% of the Region's inventory. Of the total supply 331 net hectares (821 net acres), or 23% are in registered or draft approved plans of subdivision.

Vaughan continues to have a very strong absorption rate with an average annual absorption of 64 net hectares (158 net acres) from June 2001 to January 2005.

The fully serviced portion of Vaughan's inventory is 371 net hectares (917 net acres), or 27%. The remaining portion of the inventory is currently unserviced. Of this unserviced portion, 682 net hectares (1,685 net acres), or 50% of the total local inventory are currently encumbered from development, awaiting the extension of Highway 427.

7.9 Whitchurch-Stouffville

A total of 204 net hectares (503 net acres) of vacant employment lands are found in Whitchurch-Stouffville. The registered and draft approved portion of the inventory is 46 net hectares (115 net acres), or 23%.

The average annual absorption was 2 net hectares (5 net acres) from June 2001 to January 2005.

Currently, 80 net hectares (199 net acres), or 40% of the local inventory are fully serviced. This portion of the inventory is found in the Community of Stouffville.

Industry on private services has been approved for 107 net hectares (267 net acres), or 53% of the local inventory. The parcels approved for industry on private services are found in the Gormley, Vandorf and Cardico Employment Areas.

8.0 Emerging Issues and Implications

8.1 Emerging Issues

As of January 1, 2005 there are 2,862 net hectares (7,073 net acres), or an 18.5 year supply, of vacant employment land in York Region. Of this total supply approximately 896 net hectares (2,213 net acres) are encumbered from development in the short to medium term. A further 212 net hectares (524 net acres) of the inventory are approved for development on private services. Excluding encumbered lands and lands approved for industry on private services the supply of vacant employment lands in York Region amounts to 1,754 net hectares (4,336 net acres), or a 11.8 year supply.

The availability of greenfield sites that could potentially be redesignated for employment uses is limited due to the greenbelt and other environmental conditions within the Region. Some of the local municipalities such as Aurora, Newmarket and Richmond Hill are approaching complete build-out. As such, it is important that the current supply of vacant employment lands be maintained for employment uses and that redesignations to non-employment uses are discouraged. Additionally, intensification efforts that aim to achieve higher employment densities should be encouraged.

The suitability of any given site for immediate development varies greatly depending on a number of factors such as the parcels' planning status, the provision of water and wastewater services, the size of the parcel, and the accessibility of the parcel in relation to the 400 Series Highways. In order to attract investment from all employment sectors the diversity of the supply should be maintained.

It is notable that approximately 28% of the total inventory is currently encumbered from development in the short to medium term. These encumbered lands contain large parcels and are easily accessible from 400 Series Highways. In order for the Region to maintain a highly diverse supply of vacant employment lands, these encumbered lands should receive the infrastructure necessary for development in a timely manner.

8.2 Policy Implications

The total supply of developable land in York Region has diminished over recent years due to steady population and employment growth, and to various environmental policies which have restricted the use of certain lands for low intensity purposes only.

The reduced supply of developable land has resulted in increased competition between land uses for the available lands, particularly those in prestige locations with full servicing and good access to transportation corridors.

As demand for developable land continues to increase with growth in the Region, the two main themes of "retention" and "intensification" of employment lands must be addressed. In order to properly address these themes at a regional level Section 3: Economic Vitality of the Regional Official Plan should be reviewed by staff and revisions that support stronger retention and intensification policies should be considered.

9.0 Conclusion

The 2005 Vacant Employment Land Inventory indicates that there are currently 2,862 net hectares (7,073 net acres), or an 18.5 year supply of vacant employment land. Excluding the encumbered and industry on private services lands from the analysis, there are currently 1,754 net hectares (4,336 net acres), or an 11.8 year supply.

The vacant employment land supply/demand analysis has been undertaken for York Region based on the Regional Official Plan 2026 forecast. Staff are currently working on distributing the updated Provincial forecast to the local municipalities. This work will be completed by the fall of 2005.

The tracking of employment land is a key component of York Region's growth management system for monitoring the pace of growth. More in depth analysis of the inter-relationships of the data regarding servicing, site size and site accessibility should be considered.

A current, integrated, and detailed tracking system of employment lands provides an up to date picture of consumption patterns and trends. This type of information allows for the provision of adequate employment lands to accommodate growth, yet avoids over commitments that would waste land or capital works. In this regard, there needs to be a continued emphasis on the efficient use of already designated employment lands to ensure that existing infrastructure is used wisely, thus promoting sustainable development.

In order for the Region to continue to offer a wide variety of vacant employment lands to potential investors, especially in light of the new forecasts, it is essential that investments in transportation and servicing infrastructure are provided in a timely manner.

Given the evolving nature of economic activity and the land needs of business in York Region careful, continued monitoring of the employment land inventory figures is necessary.