Appendix C

State of Manufacturing in Toronto Report Update - 2015

Summary

As part of its endorsement of the Collaborating for Competitiveness economic growth and job creation strategy, City Council has directed the preparation of an annual report on the state of manufacturing in Toronto to keep a special focus on this high value sector.

The Appendix for this report highlights key trends in manufacturing in Toronto and in the broader context, speaks to the significance of manufacturing in Toronto's economic and employment landscape.

While manufacturing in Toronto, as elsewhere, has experienced significant decreases both in the number of firms and the number of jobs, reflecting a variety of economic forces, it remains a crucial part of Toronto's economic landscape. Toronto's manufacturing and warehousing firms employ over 126,000 people representing 9.2% of Toronto's total employment which compares with the national average. Manufacturing creates quality jobs, has high economic multipliers, and needs to be recognized and supported as a component of a strong and balanced economy with good growth prospects.

In an increasingly competitive global economy, Toronto manufacturers face challenges and pressures that require them to have a stable yet flexible, cost-competitive and supportive operating environment, so they can survive, innovate and expand. With focussed and collaborative efforts, Toronto is well positioned to capitalize on its unique advantages and on the strengths of its diverse manufacturing sector, to build on emerging trends, to position the sector for growth and to continue to enhance the health and vitality of this important sector.

Decision History

At its meeting of February 20 and 21, 2013, City Council endorsed *Collaborating for Competitiveness: A Strategic Plan to Accelerate Economic Growth and Job Creation in Toronto*:
http://app.toronto.ca/tmmis/viewAgendaItemHistory.do?item=2013.ED19.4
The Collaborating for Competitiveness report recommended an annual report on the state of manufacturing in Toronto to keep a special focus on this group of high value sectors. The State of Manufacturing in Toronto report was considered by City Council on December 16, 2013.
At its meeting of December 16, 2013,`City Council endorsed State of Manufacturing in Toronto (Collaborating for Competitiveness – Implementation Action 5):
http://app.toronto.ca/tmmis/viewAgendaItemHistory.do?item=2013.ED27.1

Recommendation 5 from the State of Manufacturing in Toronto report:
City Council request the General Manager, Economic Development and Culture to report back to Economic Development Committee in the first quarter of 2015 with the next annual report on the state of manufacturing in Toronto, in the form of a 'dashboard' report providing an update

on key indicators related to manufacturing activity in Toronto and to report on the impacts of supportive measures taken in 2013 and 2014.

This Appendix responds to Council direction and forms the basis from which the manufacturing dashboard report was developed.

Employment

Manufacturing and Warehousing Employment

Manufacturing and warehousing employment in the City of Toronto was 126,136 in 2013. This was a decrease of 2,030 or 1.6% from 2012 (figure 1). Between 1998 and 2013, total manufacturing employment in Toronto declined by 51,668 jobs or 29.1%, where overall employment in the city increased by 166,827 jobs or 13.9% during the same time period (figures 1, 2 & 3).

Figure 1
Employment* by Sector City of Toronto
1998, 2003, 2008, & 2013

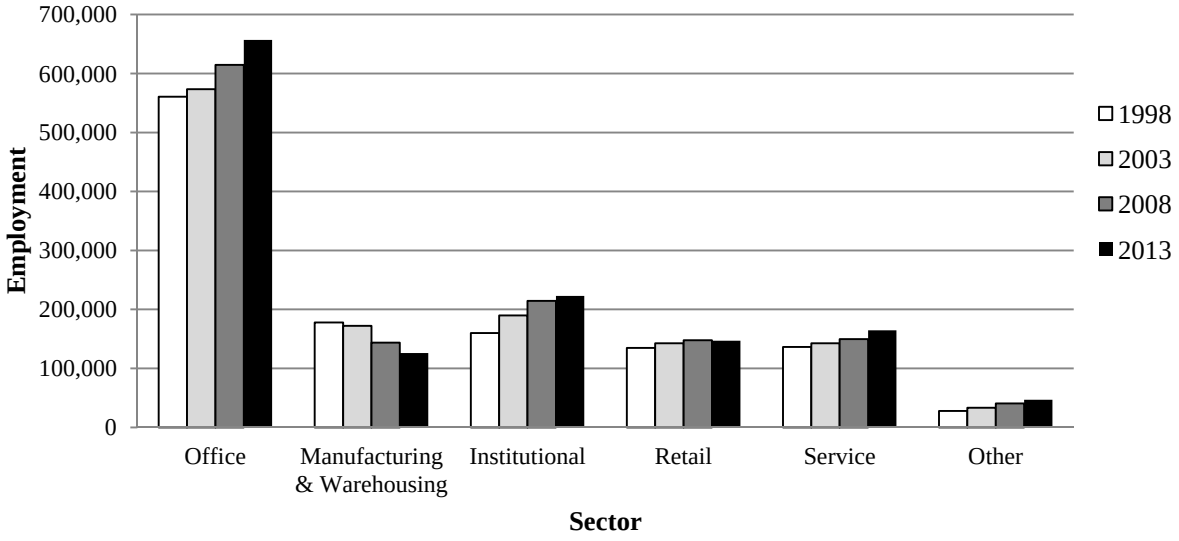
Sector	1998 #	2003 #	2008 #	2013		1998 to 2013	
				#	% of Total	# Change	% Change
Office	560,613	573,468	614,657	656,874	48.2	96,261	17.2
Manufacturing & Warehousing**	177,804	172,114	143,783	126,136	9.2	-51,668	-29.1
Institutional	159,814	189,709	214,358	222,755	16.3	62,941	39.4
Retail	134,604	142,600	147,770	146,838	10.8	12,234	9.1
Service	136,356	142,650	149,580	164,534	12.1	28,178	20.7
Other	27,832	33,149	40,701	46,713	3.4	18,881	67.8
Total	**1,197,023**	**1,253,690**	**1,310,849**	**1,363,850**	**100.0**	**166,827**	**13.9**

*Full time and part time employment

**Manufacturing & Warehousing includes all businesses with and activity codes 411 to 476 (Manufacturing) and 521 to 539 (Storage & Warehousing) in the City of Toronto, City Planning Division, Strategic Initiatives, Policy & Analysis, Toronto Employment Survey. The sub-sectors of Manufacturing include energy production, raw material processing, processed goods processing, product assembly, waste treatment, research and development (laboratories), printing, reproduction, data processing & sorting, and construction. Head offices for manufacturers are not included if the employment of the office component is greater than the employment of the manufacturing component. Warehouse and storage employment is included in this report to be consistent with the information reported in the *Profile Toronto, Toronto Employment Survey 2013* report. For the purposes of this report, manufacturing is defined as engaging in the transformation of materials into new or modified products through fabrication, processing, assembly, packaging, producing, making, repairing, finishing or blending.

Source: City of Toronto, City Planning Division, Strategic Initiatives, Policy & Analysis, Toronto Employment Survey, 1998, 2003, 2008 & 2013

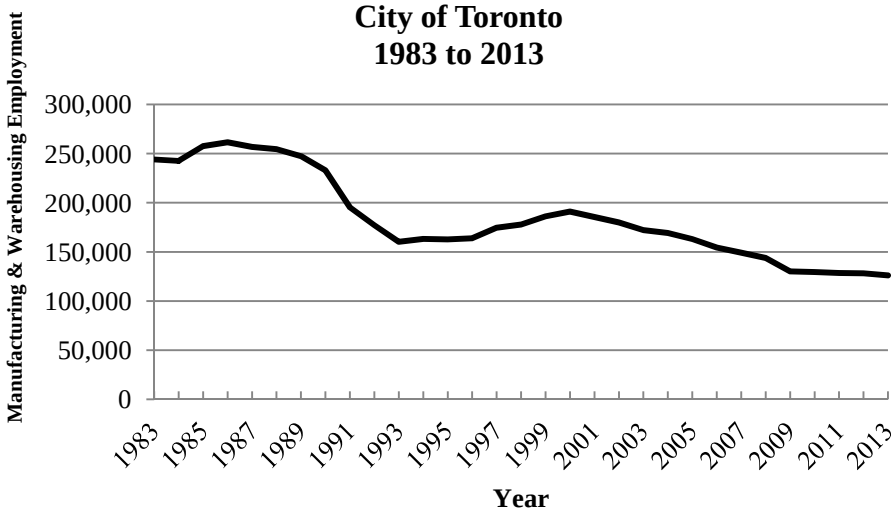
Figure 2
Employment* by Sector
City of Toronto
1998, 2003, 2008 & 2013



*Full time and part time

Source: City of Toronto, City Planning Division, Strategic Initiatives, Policy & Analysis, Toronto Employment Survey, 1998, 2003, 2008 & 2013

Figure 3
Manufacturing & Warehousing Employment*
City of Toronto
1983 to 2013



*Full time and part time

Source: City of Toronto, City Planning Division, Strategic Initiatives, Policy & Analysis, Toronto Employment Survey, 1998-2013

Manufacturing and Warehousing Sector Employment by Sub-Sector

The manufacturing and warehousing sector is dominated by the food processing, pharmaceuticals & chemicals and warehousing sub-sectors (figure 4). The manufacturing and warehousing sub-sectors experiencing employment growth from 1998 to 2013 were food processing, waste treatment, postal sorting station and storage.

Figure 4
Employment* by Manufacturing and Warehousing Sub-Sectors
City of Toronto
1998 & 2013

Manufacturing and Warehousing Sub-Sectors	1998 #	2013		1998 to 2013	
		#	% of Total	# Change	% Change
Food Processing	19,929	20,345	16.1	416	2.1
Clothing	13,953	4,662	3.7	-9,291	-66.6
Textiles, Leather	5,421	3,112	2.5	-2,309	-42.6
Paper & Wood Products	7,014	5,154	4.1	-1,860	-26.5
Component Parts	6,389	3,687	2.9	-2,702	-42.3
Metal Products	11,452	7,577	6.0	-3,875	-33.8
Pharmaceuticals & Chemicals	14,825	11,702	9.3	-3,123	-21.1
Cabinet Making	9,437	5,926	4.7	-3,511	-37.2
Building Components	6,512	5,204	4.1	-1,308	-20.1
Scientific Equipment	7,745	3,850	3.1	-3,895	-50.3
Machinery & Equipment	7,642	5,330	4.2	-2,312	-30.3
Electrical Equipment	9,020	5,505	4.4	-3,515	-39.0
Vehicles & Parts	7,924	4,097	3.2	-3,827	-48.3
Other Product Assembly	4,336	3,116	2.5	-1,220	-28.1
Waste Treatment	2,496	3,107	2.5	611	24.5
R&D Laboratories	5,696	4,871	3.9	-825	-14.5
Printing	8,963	4,877	3.9	-4,086	-45.6
Postal Sorting Station	2,722	4,327	3.4	1,605	59.0
Other Manufacturing	11,436	6,232	4.9	-5,204	-45.5
Warehousing	13,607	11,989	9.5	-1,618	-11.9
Storage	1,285	1,466	1.2	181	14.1
Total Manufacturing	**177,804**	**126,136**	**100.0**	**-51,668**	**-29.1**

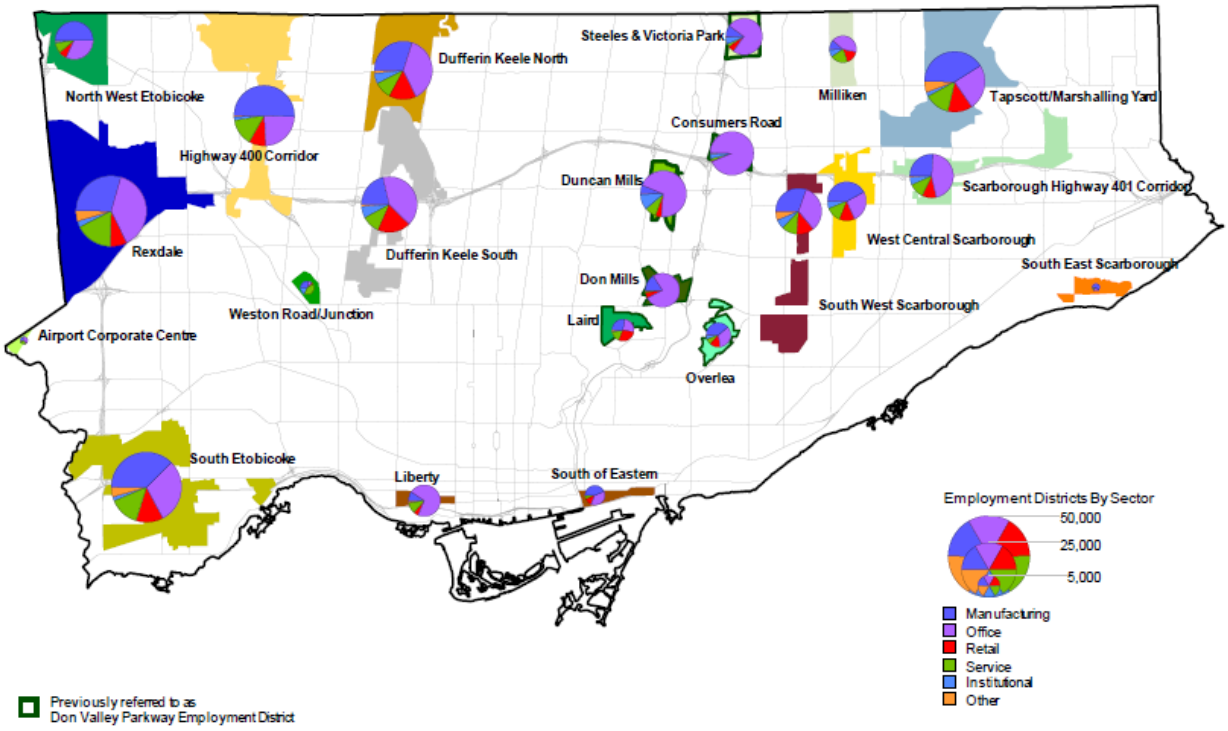
*Full time and part time
Source: City of Toronto, City Planning Division, Strategic Initiatives, Policy & Analysis, Toronto Employment Survey, 1998 & 2013

Location of Manufacturing and Warehousing Employment

The majority of manufacturing and warehousing employment is located in the 22 recognized employment districts in the City of Toronto (figure 5). Manufacturing and warehousing employment is also located in other employment related lands (figure 6). Manufacturing and warehousing employment in the employment districts was 116,640 or 92.3% of the City's total. Manufacturing and warehousing employment in the employment districts decreased by 2,420 or

2.0% from 2010 to 2013 and total employment in the employment districts increased by 8,080 or 2.1% during the same time period (figure 7). Manufacturing and warehousing employment in the employment districts increased in 11 of the 22 employment districts between 2012 and 2013 (figure 8).

Figure 5
Map of Employment Districts*
City of Toronto, 2013



*On December 18, 2013, Council enacted Amendment 231 of the Official Plan regarding Economic Health and Employment Lands Policies and Recommendations on Conversion Requests. Among other items, OPA 231 amends Policy 2.1.2 of the Official Plan by deleting the term Employment Districts and replacing it with Employment Areas. Map 2 of the Official Plan, which depicts the Employment Districts, was replaced by a new Map 2 showing Employment Areas and a different geography of land use designations. Pending Provincial approval of OPA 231, Employment Districts, as they are described in this report will change. In the interest of providing a profile of employment and Employment Districts in Toronto, this report includes a final summary of each Employment District. To reflect the change of geographies in this bulletin, all other designated employment lands not included in Employment Districts are reported as Other Employment-Related Lands

Source: Toronto City Planning, Research and Information - March 2014

Figure 6
Employment* in Employment Districts and Rest of City
City of Toronto
2010 and 2013

Sector	2010		2013			2010 to 2013	
	Employment District	Rest of City	Employment District	% of Employment District	Rest of City	# Change Employment District	% Change Employment District
Office	158,240	465,060	160,040	40.7	496,660	1,800	1.1
Manufacturing & Warehousing	118,880	10,620	116,460	29.6	9,740	-2,420	-2.0
Institutional	13,970	199,530	15,880	4.0	206,820	1,910	13.7
Retail	39,440	101,060	42,070	10.7	122,730	2,630	6.7
Service	47,560	103,340	48,370	12.3	115,370	810	1.7
Other	7,460	33,040	10,050	2.6	36,550	2,590	34.7
Total	**385,550**	**912,750**	**393,630**	**100.0**	**969,920**	**8,080**	**2.1**

*Full time and part time employment

Source: City of Toronto, City Planning Division, Strategic Initiatives, Policy & Analysis, Toronto Employment Survey, 2010 & 2013

Figure 7
Employment* in Employment Districts
City of Toronto
2008, 2012 and 2013

Employment District	2008	2012	2013	2008 to 2013		2012 to 2013	
				# Change	% Change	# Change	% Change
South Etobicoke	44,000	40,390	41,080	-2,920	-6.6	690	1.7
Rexdale	47,090	39,150	40,790	-6,300	-13.4	1,640	4.2
Highway 400 Corridor	34,170	33,540	32,490	-1,680	-4.9	-1,050	-3.1
Tapscott/Marshalling Yard	31,340	30,960	31,440	100	0.3	480	1.6
Dufferin Keele North	30,780	31,080	30,350	-430	-1.4	-730	-2.3
Dufferin Keele South	26,130	25,100	26,400	270	1.0	1,300	5.2
Duncan Mills	17,750	18,580	19,090	1,340	7.5	510	2.7
South West Scarborough	19,170	18,670	19,030	-140	-0.7	360	1.9
Consumers Road	17,770	17,490	17,660	-110	-0.6	170	1.0
Scarborough Highway 401 Corridor	18,080	16,820	16,990	-1,090	-6.0	170	1.0
West Central Scarborough	16,610	14,730	14,270	-2,340	-14.1	-460	-3.1
North West Etobicoke	13,630	13,010	13,450	-180	-1.3	440	3.4
Steeles & Victoria Park	14,140	13,270	13,020	-1,120	-7.9	-250	-1.9
Don Mills	11,940	11,990	11,550	-390	-3.3	-440	-3.7
Liberty	7,260	8,300	9,450	2,190	30.2	1,150	13.9
Milliken	7,050	7,300	7,550	500	7.1	250	3.4
Overlea	6,620	6,220	6,150	-470	-7.1	-70	-1.1
Laird	5,160	4,390	4,960	-200	-3.9	570	13.0
South of Eastern	5,520	3,970	4,280	-1,240	-22.5	310	7.8
Weston Road/Mount Dennis	990	1,850	1,940	950	96.0	90	4.9
South East Scarborough	1,020	980	980	-40	-3.9	0	0.0
Airport Corporate Centre	1,080	1,230	890	-190	-17.6	-340	-27.6
Other Employment Related Lands	27,220	29,480	29,720	2,500	9.2	240	0.8
All Employment Districts/Lands	**404,520**	**388,860**	**393,530**	**-10,990**	**-2.7**	**4,670**	**1.2**
Rest of City	**906,330**	**942,620**	**970,920**	**64,590**	**7.1**	**28,300**	**3.0**
City Total	**1,310,850**	**1,331,480**	**1,363,550**	**52,700**	**4.0**	**32,070**	**2.4**

*Full time and part time employment

Source: City of Toronto, City Planning Division, Strategic Initiatives, Policy & Analysis, Toronto Employment Survey, 2008, 2012 & 2013

Figure 8
Manufacturing and Warehousing
Employment* in Employment Districts
City of Toronto
2010, 2012 and 2013

Employment District	2010	2012	2013	2008 to 2013		2012 to 2013	
				# Change	% Change	# Change	% Change
South Etobicoke	16,000	15,980	15,470	-530	-3.3	-510	-3.2
Rexdale	13,430	12,560	12,030	-1,400	-10.4	-530	-4.2
Highway 400 Corridor	15,180	16,840	16,440	1,260	8.3	-400	-2.4
Tapscott/Marshalling Yard	12,890	12,710	12,940	50	0.4	230	1.8
Dufferin Keele North	8,630	8,600	9,100	470	5.4	500	5.8
Dufferin Keele South	4,920	5,250	5,640	720	14.6	390	7.4
Duncan Mills	940	1,070	1,180	240	25.5	110	10.3
South West Scarborough	5,650	5,770	5,820	170	3.0	50	0.9
Consumers Road	110	40	80	-30	-27.3	40	100.0
Scarborough Highway 401 Corridor	3,250	4,610	4,490	1,240	38.2	-120	-2.6
West Central Scarborough	6,880	6,640	6,020	-860	-12.5	-620	-9.3
North West Etobicoke	7,420	5,530	6,750	-670	-9.0	1,220	22.1
Steeles & Victoria Park	1,520	1,270	1,290	-230	-15.1	20	1.6
Don Mills	2,590	2,070	1,830	-760	-29.3	-240	-11.6
Liberty	1,070	950	890	-180	-16.8	-60	-6.3
Milliken	1,010	920	860	-150	-14.9	-60	-6.5
Overlea	2,650	2,490	2,400	-250	-9.4	-90	-3.6
Laird	1,470	1,360	1,340	-130	-8.8	-20	-1.5
South of Eastern	2,120	1,860	1,870	-250	-11.8	10	0.5
Weston Road/Mount Dennis	400	410	520	120	30.0	110	26.8
South East Scarborough	700	600	620	-80	-11.4	20	3.3
Airport Corporate Centre	470	450	220	-250	-53.2	-230	-51.1
Other Employment Related Lands	9,570	8,690	8,660	-910	-9.5	-30	-0.3
All Employment Districts/Lands	**118,880**	**117,670**	**116,460**	**-2,420**	**-2.0**	**-1,210**	**-1.0**
Rest of City	**10,620**	**10,530**	**9,740**	**-880**	**-8.3**	**-790**	**-7.5**
City Total	**129,500**	**128,200**	**126,200**	**-3,300**	**-2.5**	**-2,000**	**-1.6**

*Full time and part time employment

Source: City of Toronto, City Planning Division, Strategic Initiatives, Policy & Analysis, Toronto Employment Survey, 2010, 2012 & 2013

Establishments

Manufacturing and Warehousing Establishments

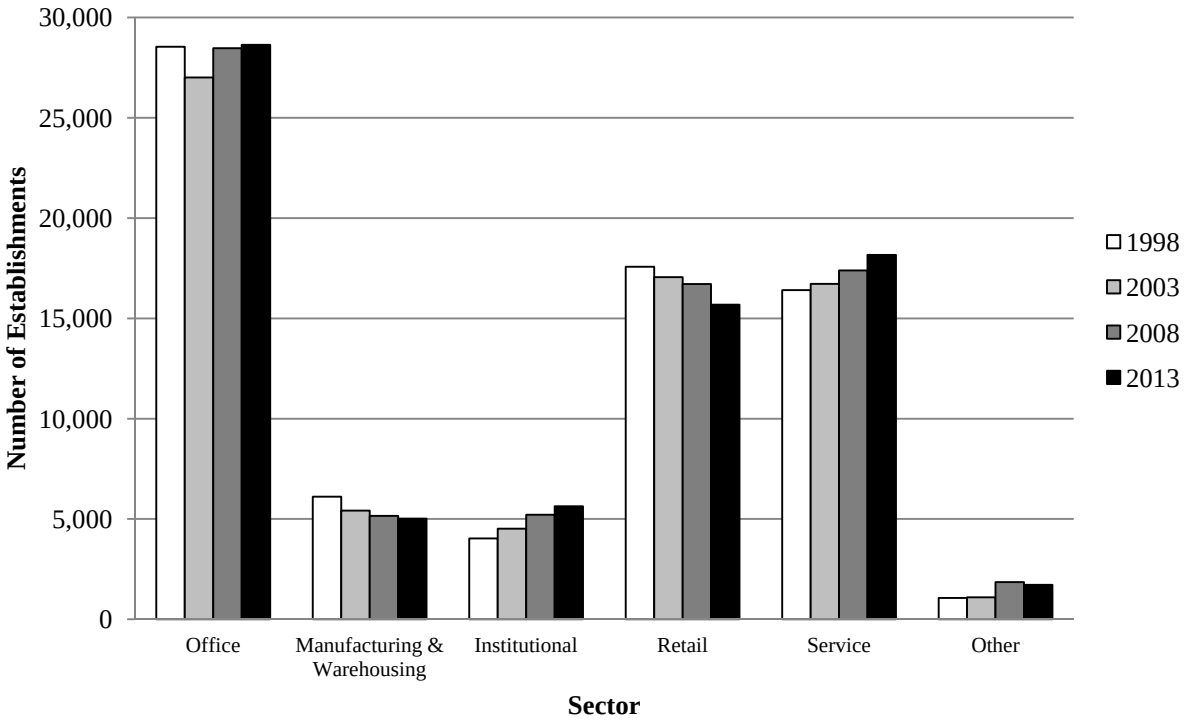
There were 5,018 manufacturing and warehousing establishments in the City of Toronto in 2013 representing 6.7% of the total number of establishments (figure 9 & 10). Manufacturing and warehousing establishments have decreased by over 1,091 or 17.9% since 1998. The total number of establishments in the City increased by 1,128 or 1.5% between 1998 and 2013.

Figure 9
Establishments by Sector
City of Toronto
1998, 2003, 2008, and 2013

Sector	1998 #	2003 #	2008 #	2013		1998 to 2013	
				#	% of Total	# Change	% Change
Office	28,539	27,012	28,469	28,641	38.3	102	0.4
Manufacturing & Warehousing	6,109	5,414	5,157	5,018	6.7	-1,091	-17.9
Institutional	4,029	4,512	5,209	5,632	7.5	1,603	39.8
Retail	17,577	17,059	16,711	15,682	21.0	-1,895	-10.8
Service	16,406	16,722	17,390	18,168	24.3	1,762	10.7
Other	1,065	1,094	1,853	1,712	2.3	647	60.8
Total	**73,725**	**71,813**	**74,789**	**74,853**	**100.0**	**1,128**	**1.5**

Source: City of Toronto, City Planning Division, Strategic Initiatives, Policy & Analysis, Toronto Employment Survey, 1998, 2003, 2008 & 2013

Figure 10
Establishments by Sector
City of Toronto
1998, 2003, 2008 & 2013



Source: City of Toronto, City Planning Division, Strategic Initiatives, Policy & Analysis, Toronto Employment Survey, 1998, 2003, 2008 & 2013

Establishments by Manufacturing and Warehousing Sub-Sector

In the manufacturing and warehousing sub-sectors, several have shown an increase between 1998 and 2013 including food processing with an increase of 21 or 5.8%, paper wood products with an increase of 36 or 21.8%, building components with an increase of 3 or 1.0%, vehicles & parts with an increase of 10 or 15.9%, waste treatment with an increase of 37 or 59.7% and warehousing with an increase of 127 or 28.1% (figure 11).

Figure 11
Establishments by Manufacturing and Warehousing Sub-Sector
City of Toronto
1998 and 2013

Manufacturing and Warehousing Sub-Sectors	1998 #	2013		1998 to 2013	
		#	% of Total	# Change	% Change
Food Processing	360	381	7.6	21	5.8
Clothing	595	240	4.8	-355	-59.7
Textiles, Leather	197	160	3.2	-37	-18.8
Paper & Wood Products	165	201	4.0	36	21.8
Component Parts	245	190	3.8	-55	-22.4
Metal Products	466	391	7.8	-75	-16.1
Pharmaceuticals & Chemicals	286	211	4.2	-75	-26.2
Cabinet Making	465	363	7.2	-102	-21.9
Building Components	308	311	6.2	3	1.0
Scientific Equipment	93	60	1.2	-33	-35.5
Machinery & Equipment	360	241	4.8	-119	-33.1
Electrical Equipment	215	166	3.3	-49	-22.8
Vehicles & Parts	63	73	1.5	10	15.9
Other Product Assembly	307	240	4.8	-67	-21.8
Waste Treatment	62	99	2.0	37	59.7
R&D Laboratories	76	58	1.2	-18	-23.7
Printing	753	554	11.0	-199	-26.4
Postal Sorting Station	18	16	0.3	-2	-11.1
Other Manufacturing	376	281	5.6	-95	-25.3
Warehousing	452	579	11.5	127	28.1
Storage	247	203	4.0	-44	-17.8
Total Manufacturing	**6,109**	**5,018**	**100.0**	**-1,091**	**-17.9**

Source: City of Toronto, City Planning Division, Strategic Initiatives, Policy & Analysis, Toronto Employment Survey, 1998 & 2013

Manufacturing and Warehousing Establishments by Number of Employees

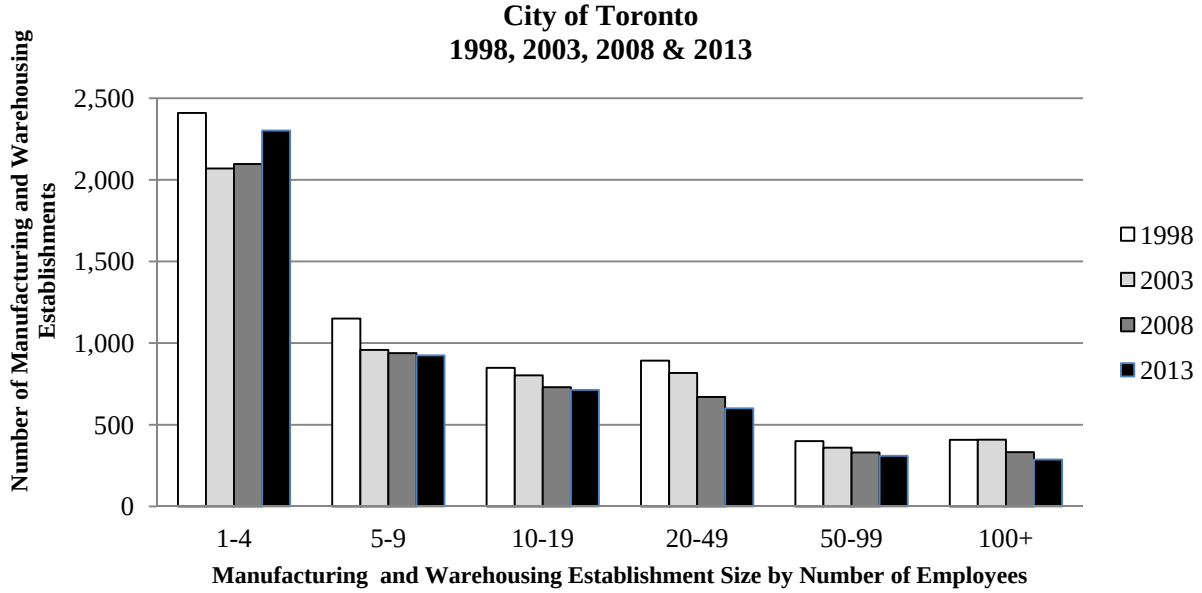
The number of manufacturing and warehousing establishments by the number of employees is dominated by the 1 to 4 employee category with 2,302 or 44.8% of the total establishments in the City of Toronto (figure 12 & 13). The 1 to 4 employee category saw an increase of 205 establishments or 9.8% from 2008 to 2013.

Figure 12
Manufacturing and Warehousing Establishments by Number of Employees*
City of Toronto
1998, 2003, 2008, and 2013

Establishment Size by Number of Employees	1998 #	2003 #	2008 #	2013		1998 to 2013	
				#	% of Total	# Change	% Change
1 to 4	2,410	2,070	2,097	2,302	44.8	-108	-4.5
5 to 9	1,150	958	939	925	18.0	-225	-19.6
10 to 19	849	802	730	713	13.9	-136	-16.0
20 to 49	893	817	670	601	11.7	-292	-32.7
50 to 99	400	359	330	309	6.0	-91	-22.8
100+	407	408	332	287	5.6	-120	-29.5
Total Establishments	**6,109**	**5,414**	**5,157**	**5,137**	**100.0**	**-972**	**-15.9**

*Full time and part time employment
Source: City of Toronto, City Planning Division, Strategic Initiatives, Policy & Analysis, Toronto Employment Survey, 1998, 2003, 2008 & 2013

Figure 13
Manufacturing and Warehousing Establishments by Number of Employees
City of Toronto
1998, 2003, 2008 & 2013



Source: City of Toronto, City Planning Division, Strategic Initiatives, Policy & Analysis, Toronto Employment Survey, 1998, 2003, 2008 & 2013

New Establishments

There were 200 new manufacturing and warehousing establishments in the City of Toronto in 2013. This represented 4.6% of the new establishments in all sectors (figure 14). 1,310 new establishments located in employment districts in 2013 representing 30.2% of the total (figure 15).

Figure 14
New Establishments* by Sector
City of Toronto
2007, 2008, 2009, 2012 & 2013

Sector	2007	2008	2009	2012	2013	2013 % of Total
Office	1,525	1,267	1,393	1,380	1,690	**38.9**
Manufacturing & Warehousing	172	150	170	180	200	**4.6**
Institutional	208	151	223	180	330	**7.6**
Retail	867	769	770	630	820	**18.9**
Service	954	999	930	910	1,070	**24.7**
Other	124	620	338	120	230	**5.3**
Total	**3,850**	**3,956**	**3,824**	**3,400**	**4,340**	**100.0**

*New establishments include new business start-ups as well as existing firms relocating from outside the City of Toronto and new locations of multi-location firms.
Source: City of Toronto, City Planning Division, Strategic Initiatives, Policy & Analysis, Toronto Employment Survey, 2007, 2008, 2009, 2012 & 2013

Figure 15
New Establishments by Location
City of Toronto
2007, 2008, 2009, 2012 & 2013

Location	2007	2008	2009	2012	2013	2013 % of Total
Centres	220	260	270	170	190	4.4
Downtown	980	830	820	760	970	22.4
Employment District	970	1,120	960	1,100	1,310	30.2
Rest of City	1,680	1,750	1,770	1,380	1,870	43.1
Total	**3,850**	**3,960**	**3,820**	**3,410**	**4,340**	**100.0**

Source: City of Toronto, City Planning Division, Strategic Initiatives, Policy & Analysis, Toronto Employment Survey, 2007, 2008, 2009, 2012 & 2013

Business Establishment Longevity

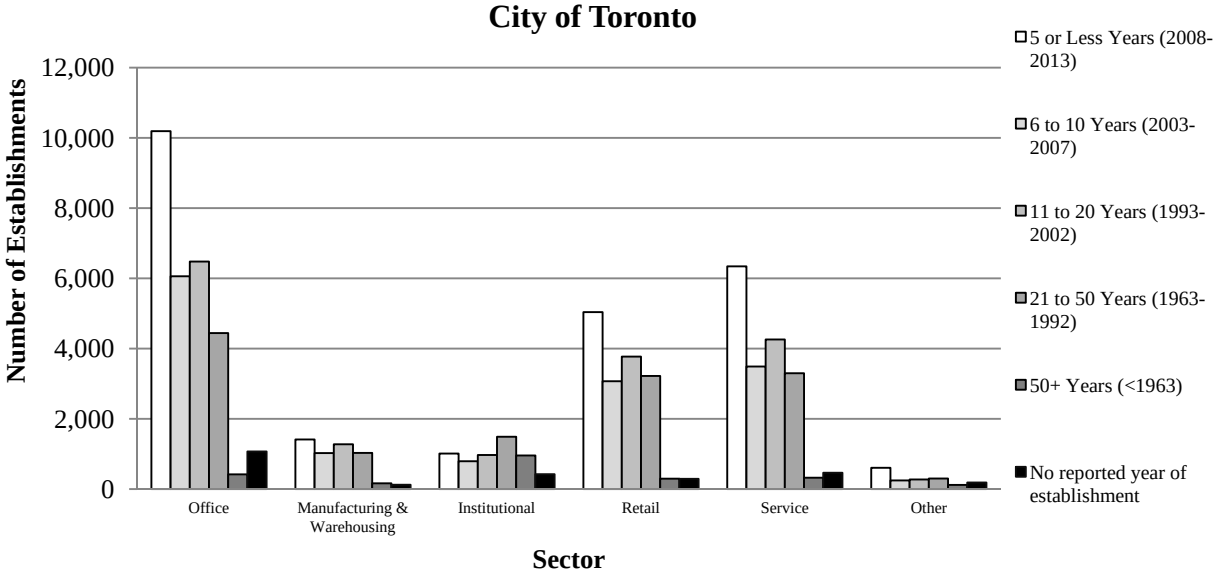
Longevity of establishments in the manufacturing and warehousing sector is one of the highest of the six identified sectors in the City of Toronto. Manufacturing and warehousing establishments 21 years and older accounted for 1,190 establishments or 23.7% of the total in 2013 (figure 16 & 17). Office, retail and service sector establishments 21 years and older accounted for 16.9%, 22.4% and 19.9% respectively. The change in number of establishment from 5 or less years to 6 to 10 years for the manufacturing and warehousing sector was 391 or 27.7%. By comparison, the change from 5 or less years to 6 to 10 years for the office, retail and service sectors in 2013 was 40.6%, 39.0% and 44.9% respectively (figure 16 & 17).

Figure 16
Longevity of Establishments by Sector by Year Started
City of Toronto
2013

Sector	5 or Less Years (2008-2013)	6 to 10 Years (2003-2007)	11 to 20 Years (1993-2002)	21 to 50 years (1963 to 1992)	Greater than 50 Years (<1963)	No Reported Start Year	Total
Office	10,188	6,056	6,475	4,438	416	1,068	28,641
Manufacturing & Warehousing	1,412	1,021	1,274	1,028	162	121	5,018
Institutional	1,009	791	970	1,487	954	421	5,632
Retail	5,039	3,071	3,769	3,218	294	291	15,682
Service	6,338	3,490	4,260	3,298	320	462	18,168
Other	602	243	271	298	115	183	1,712
Total	**24,588**	**14,672**	**17,019**	**13,767**	**2,261**	**2,546**	**74,853**

Source: City of Toronto, City Planning Division, Strategic Initiatives, Policy & Analysis, Toronto Employment Survey, 2013

Figure 17
Establishment Longevity by Sector
by Number of Years in Business
City of Toronto



Source: City of Toronto, City Planning Division, Strategic Initiatives, Policy & Analysis, Toronto Employment Survey, 2013

Employees per Establishment

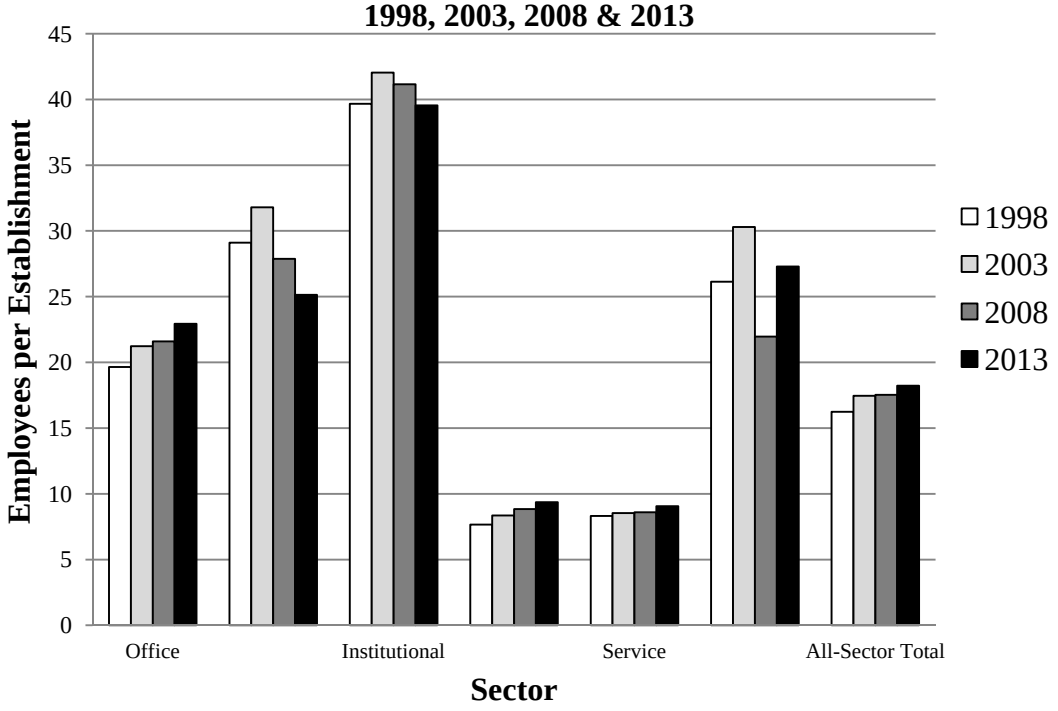
The average number of employees per establishment in the manufacturing and warehousing sector has decreased slightly from 29 to 25 employees per establishment or 13.7% from 1998 to 2013. The only other sector to show a decrease in employees per establishment during this time period was the institutional sector. All sectors showed an increase of two employees per establishment or 12.3% from 1998 to 2013 (figure 18 & 19).

Figure 18
Employees* per Establishment by Sector
City of Toronto
1998, 2003, 2008 & 2013

Sector	1998	2003	2008	2013	1998 to 2013	
					# Change	% Change
Office	19.6	21.2	21.6	22.9	3.3	16.8
Manufacturing & Warehousing	29.1	31.8	27.9	25.1	-4.0	-13.7
Institutional	39.7	42.0	41.2	39.6	-0.1	-0.3
Retail	7.7	8.4	8.8	9.4	1.7	22.1
Service	8.3	8.5	8.6	9.1	0.7	8.4
Other	26.1	30.3	22.0	27.3	1.2	4.6
Total	**16.2**	**17.5**	**17.5**	**18.2**	**2.0**	**12.3**

*Full time and part time employees
Source: City of Toronto, City Planning Division, Strategic Initiatives, Policy & Analysis, Toronto Employment Survey, 1998, 2003, 2008 & 2013

Figure 19
Employees* per Establishment by Sector
City of Toronto
1998, 2003, 2008 & 2013



*Full time and part time employees
Source: City of Toronto, City Planning Division, Strategic Initiatives, Policy & Analysis, Toronto Employment Survey, 1998, 2003, 2008 & 2013

Productivity

Gross Domestic Product in Manufacturing Sub-Sectors

Gross Domestic Product (GDP), or output per job, is a measure of productivity, the efficiency with which the economy uses labour to produce goods and services. Productivity will be higher in sectors that are more capital-intensive, and where firms exploit economies of scale, employ more skilled workers, or use advanced technologies. Productivity growth in manufacturing may occur for a number of reasons. For example, labour productivity may rise if output increases while employment levels decrease or stay the same. This phenomenon may also occur as a result of firms increasing their use of technology and capital inputs in order to become more productive.

In 2013, manufacturing industries produced an estimated $13.9 billion of output (in constant 2002 dollars), which accounted for 11% of the total output of goods and services produced in the city of Toronto (figure 20 & 21). Over the period of 1998-2013, estimated manufacturing GDP decreased by over 16.8%. Among the major manufacturing sub-sectors, the pharmaceutical sub-sector had the largest GDP percent growth between 1998 and 2013 in an increase of 68.8% (from $481 million to $813 million). GDP for all industries in the city increased from $96.3 billion to $126.9 billion or 31.8% during the same time period.

In terms of GDP per job, manufacturing increased from $78,400 to $97,000 or 23.7% over the period of 1998-2013 (figure 22). During the same time period, the GDP per job for all industries increased from $69,300 to $79,000 or 14.0%. The pharmaceutical sub-sector had the largest absolute and percent increase in GDP per job from 1998 to 2013 with an increase of $67,947 per job or 106.3%.

Figure 20
Gross Domestic Product* (GDP) in Manufacturing Sub-Sectors
City of Toronto
1998, 2003, 2008 & 2013

Manufacturing Sub-Sector	1998 ($ millions)	2003 ($ millions)	2008 ($ millions)	2013 ($ millions)	$ Change (millions) 1998 to 2013	% Change 1998-2013
Food and Beverage	2,929	2,916	2,576	2,832	-97	-3.3
Printing	808	646	555	518	-290	-35.9
Pharmaceutical	481	825	728	813	331	68.8
Primary and Fabricated Metal	1,250	1,517	1,315	1,258	8	0.6
Machinery and Equipment	783	636	569	502	-281	-35.8
Computer and Electronic Products	889	1,058	656	727	-163	-18.3
Motor Vehicle	1,574	1,358	860	638	-936	-59.5
Furniture	1,048	780	680	620	-428	-40.8
Other Manufacturing	6,904	6,465	6,030	5,955	-949	-13.7
Manufacturing Total	16,666	16,201	13,968	13,862	-2,804	-16.8
All Industries	**96,289**	**111,320**	**121,513**	**126,863**	**30,574**	**31.8**

*Note: Gross Domestic Product (GDP) in constant 2002 dollars
Source: City of Toronto, Toronto Econometric Model (Version 8)

Figure 21
Gross Domestic Product* (GDP) in All Industries
City of Toronto
1998, 2003, 2008 & 2013

Sector	1998 ($ millions)	2003 ($ millions)	2008 ($ millions)	2013 ($ millions)	$ Change (millions) 1998 to 2013	% Change 1998 to 2013
Goods	22,177	21,526	19,289	19,847	-2,329	-10.5
Primary	238	217	246	252	13	5.6
Construction	3,127	3,735	4,057	4,429	1,303	41.7
Utilities	2,145	1,374	1,018	1,305	-841	-39.2
Manufacturing	16,666	16,201	13,968	13,862	-2,804	-16.8
Services	74,112	89,794	102,224	107,016	32,904	44.4
Wholesale & Retail Trade	8,872	10,403	11,343	11,040	2,168	24.4
Transportation, Storage & Communication	8,437	12,130	13,015	13,780	5,343	63.3
Finance, Insurance & Real Estate	27,892	34,401	40,263	42,797	14,905	53.4
Commercial Services	14,116	17,261	19,692	19,511	5,395	38.2
Public Administration & Defence	4,522	4,448	5,135	6,202	1,680	37.2
All Industries	**96,289**	**111,320**	**121,513**	**126,863**	**30,574**	**31.8**

*Note: Gross Domestic Product (GDP) in constant 2002 dollars
Source: City of Toronto, Toronto Econometric Model (Version 8)

Figure 22
Gross Domestic Product* (GDP) per Job in Manufacturing Sub-Sectors
City of Toronto
1998, 2003, 2008 & 2013

Manufacturing Sub-Sector	1998 ($GDP/Job)	2003 ($GDP/Job)	2008 ($GDP/Job)	2013 ($GDP/Job)	$ Change ($GDP/Job) 1998 to 2013	% Change ($GDP/Job) 1998 to 2013
Food and Beverage	91,425	92,438	85,883	98,755	7,330	8.0
Printing	58,501	56,484	56,157	56,927	-1,574	-2.7
Pharmaceutical	63,942	92,939	109,933	131,888	67,947	106.3
Primary and Fabricated Metal	78,617	100,275	97,513	98,175	19,559	24.9
Machinery and Equipment	123,868	98,068	112,753	119,169	-4,700	-3.8
Computer and Electronic Products	46,938	54,389	59,803	71,041	24,103	51.4
Motor Vehicle	120,158	111,442	113,702	123,523	3,365	2.8
Furniture	76,811	54,236	48,745	54,977	-21,834	-28.4
Other Manufacturing	75,733	78,801	96,502	107,872	32,140	42.4
Manufacturing Total	**78,448**	**80,389**	**87,305**	**97,047**	**18,600**	**23.7**
All Industries	**69,330**	**75,060**	**77,326**	**79,051**	**9,720**	**14.0**

*Note: Gross Domestic Product (GDP) in constant 2002 dollars
Source: City of Toronto, Toronto Econometric Model (Version 8)

Employee Profile

Wages

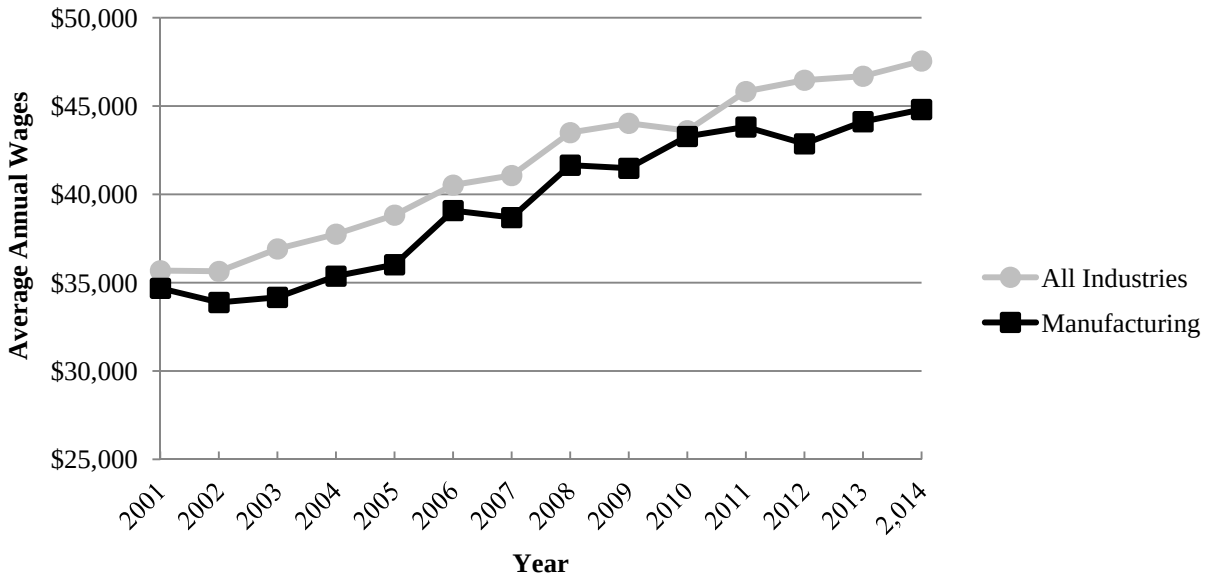
Average annual wages for City of Toronto manufacturing increased by $10,124 or 29.2% from 2001 to 2014 (figure 23, 24 & 25). By comparison, the average annual wages for all industries increased by $11,874 or 33.3% during the same time period. In 2014, the average annual wage for manufacturing was $44,810 and for all industries was $47,556.

Figure 23
Average Annual Wages*
City of Toronto
2001, 2006, 2011, 2013 & 2014

	Average Annual Wages per Year					Change 2001 to 2014	
	2001	**2006**	**2011**	**2013**	**2014**	**#**	**%**
Manufacturing	$34,686	$39,087	$43,821	$44,123	$44,810	$10,124	29.2
All Industries	$35,682	$40,528	$45,828	$46,695	$47,556	$11,874	33.3
Difference between All Industries and Manufacturing	$996	$1,441	$2,007	$2,572	$2,746	$1,750	4.1

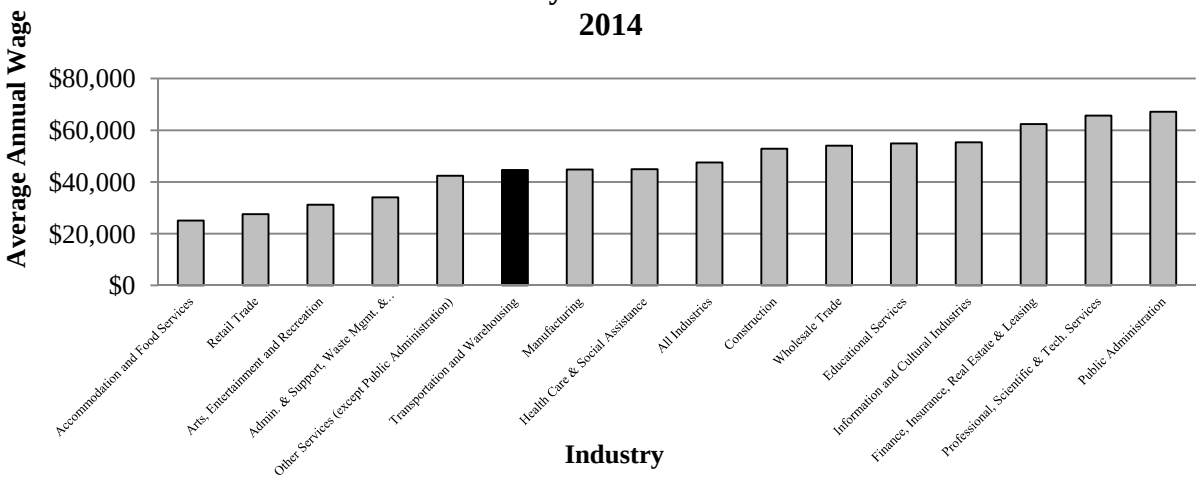
Note: *Employees only, does not include self-employed.
Source: Statistics Canada, Labour Force Survey, 2001-2014

Figure 24
Average Annual Wages
City of Toronto
2001-2014



Note: *Employees only, does not include self-employed.
Source: Statistics Canada, Labour Force Survey, 2001-2014

Figure 25
Industry Average Annual Wage
City of Toronto
2014



Note: *Employees only, does not include self-employed.
Source: Statistics Canada, Labour Force Survey, 2001-2014

Education

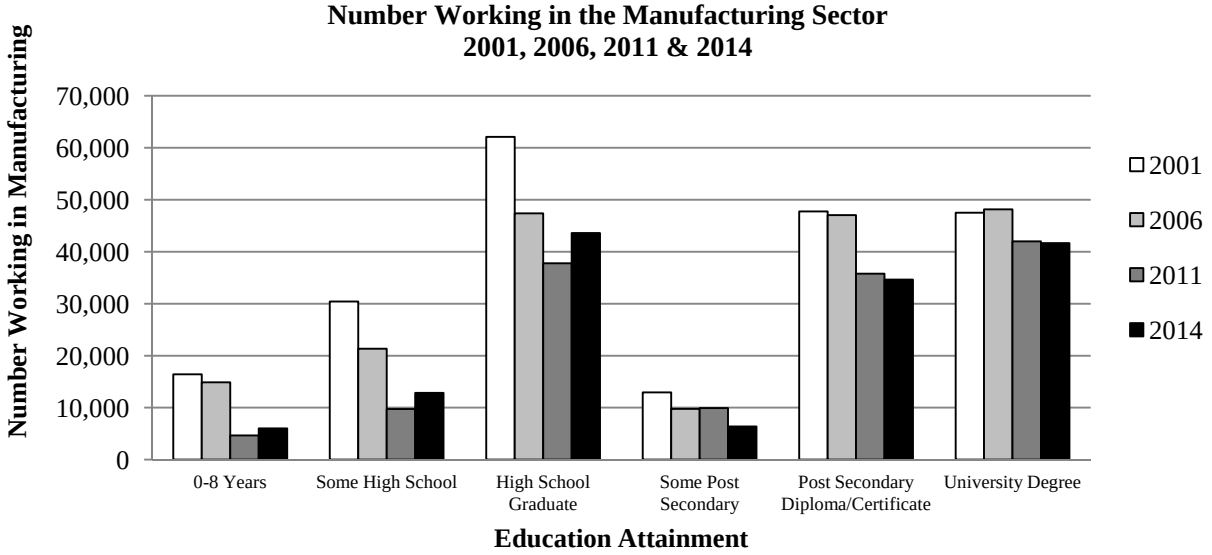
An increasing proportion of City of Toronto residents working in the manufacturing sector possess a post secondary diploma/certificate or a university degree (figure 26-28). The percentage of residents working in the manufacturing sector holding a university degree increased from 12.9% to 18.2% from 2001 to 2014. Likewise, those holding a post secondary diploma/certificate increased from 32.8% to 37.8%. All other education categories showed a decrease during the same time period.

Figure 26
Educational Attainment of City of Toronto Residents
Working in the Manufacturing Sector
2001, 2006, 2011 & 2014

Education Attainment	2001 #	2006 #	2011 #	2014		2001 to 2014	
				#	% of Total	# Change	% Change
0-8 Years	16,420	14,880	4,670	6,020	4.1	-10,400	-63.3
Some High School	30,430	21,340	9,740	12,850	8.9	-17,580	-57.8
High School Graduate	62,100	47,390	37,790	43,600	30.0	-18,500	-29.8
Some Post Secondary	12,930	9,770	9,910	6,370	4.4	-6,560	-50.7
Post Secondary Diploma / Certificate	47,760	47,050	35,780	34,630	23.9	-13,130	-27.5
University Degree	47,490	48,160	41,980	41,640	28.7	-5,850	-12.3
Total	217,130	188,590	139,870	145,110	100.0	-72,020	-33.2

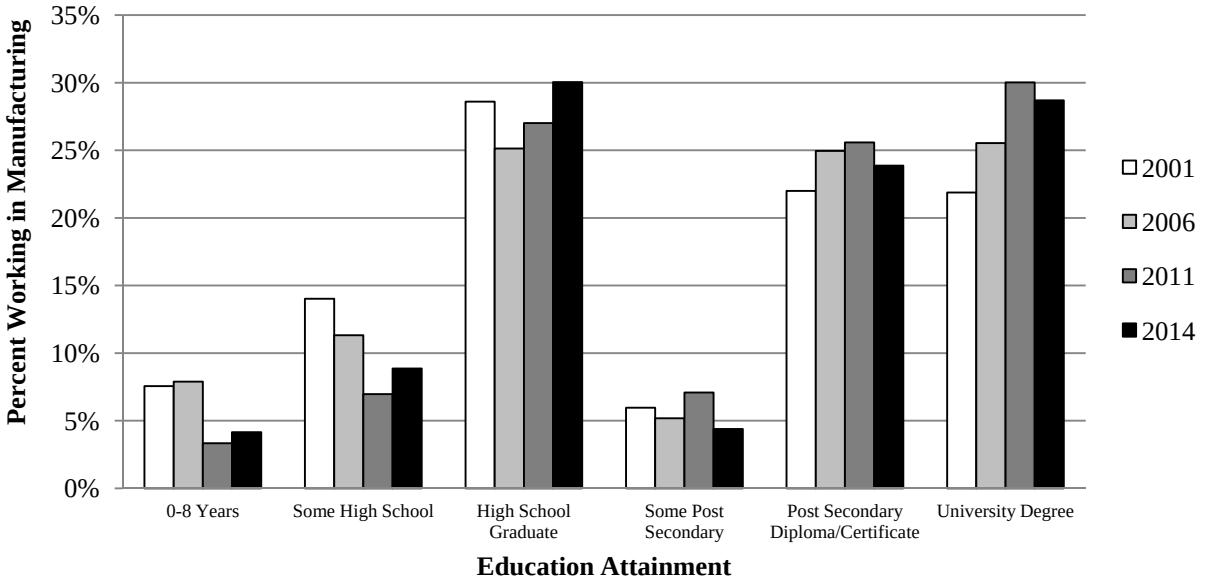
Source: Statistics Canada's Labour Force Survey, 2001-2014. Includes total employees and self-employed individuals.

Figure 27
Educational Attainment of City of Toronto Residents
Number Working in the Manufacturing Sector
2001, 2006, 2011 & 2014



Source: Statistics Canada's Labour Force Survey, 2001-2014. Includes total employees and self-employed individuals.

Figure 28
Educational Attainment of City of Toronto Residents
Percent Working in the Manufacturing Sector
2001, 2006, 2011 & 2014



Source: Statistics Canada's Labour Force Survey, 2001-2014. Includes total employees and self-employed individuals.

Wages and Education

As with all industries, wages in manufacturing tend to increase with the level of education attained. Wages for both manufacturing and all industries tend to be lower in the City of Toronto than in the Toronto CMA, Ontario and Canada (figure 29). This may be a factor in the cost competitiveness of manufacturing in Toronto compared to other regions (figure 38). Adjusting for education levels, manufacturing wages exceed all industries wages for most education attainments levels of City of Toronto residents. For example, City of Toronto residents in manufacturing with some post-secondary education earn $2.00 more per hour on average than residents in all industries (figure 29).

Figure 29
Median Hourly Wages and Education Attainment in Manufacturing and All Industries
City of Toronto, Toronto CMA, Ontario & Canada
2014

Education Attainment	City of Toronto		Toronto CMA		Ontario		Canada	
	Manuf.	All Ind.	Manuf.	All Ind.	Manuf.	All Ind.	Manuf.	All Ind.
0-8 years of school	$18.00	$16.60	$17.26	$17.00	$18.00	$16.50	$17.26	$15.50
Some secondary	$16.00	$13.75	$17.00	$13.46	$18.00	$12.98	$18.00	$14.00
Graduate from high school	$18.75	$16.30	$18.84	$17.00	$20.00	$17.00	$20.00	$18.00
Some post-secondary	$16.00	$14.00	$18.00	$14.00	$20.13	$15.00	$19.85	$15.00
Post-secondary certificate or diploma	$18.00	$20.00	$23.00	$22.00	$24.35	$22.62	$23.75	$22.00
University degree	$22.00	$27.50	$25.00	$28.21	$27.00	$30.00	$27.69	$29.45
Total	$19.00	$20.84	$20.00	$21.33	$22.00	$21.15	$21.90	$21.00

Source: Statistics Canada - Labour Force Survey

Employment in All Sectors by Full-Time Employment

The manufacturing and warehousing sector remains the sector with the highest percentage of full time workers with 92.7% in 2013 (figure 30). This is the same percentage of full time workers in the manufacturing and warehousing sector in 1998. The percentage of full time workers for all sectors was 76.9% in 2013 which was a decrease of 2.4% from 1998 to 2013.

Figure 30
Full-Time Employment by Sector City of Toronto
1998 and 2013

Sector	1998		2013		% Change 1998 to 2013
	Full Time Employment	Full Time Employment %	Full-Time Employment	Full Time Employment %	
Office	486,110	86.7	575,410	87.6	0.9
Manufacturing & Warehousing	164,777	92.7	116,867	92.7	0.0
Institutional	113,098	70.8	151,728	68.1	-2.7
Retail	78,779	58.5	77,363	52.7	-5.8
Service	92,309	67.7	104,969	63.8	-3.9
Other	13,806	49.6	21,958	47.0	-2.6
Total	948,879	79.3	1,048,295	76.9	-2.4

Source: City of Toronto, City Planning Division, Strategic Initiatives, Policy & Analysis, Toronto Employment Survey, 1998 & 2013

Manufacturing Employment by Age Group

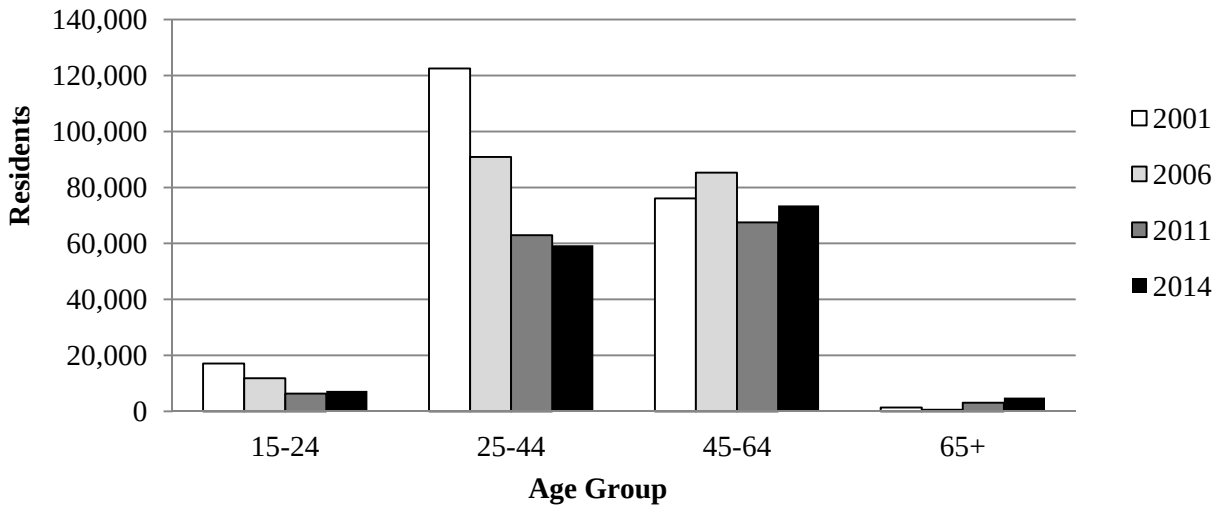
The average age of City of Toronto residents working in the manufacturing sector is increasing. From 2001 to 2014, the number of workers aged 65+ increased by 3,500 or over 250%. At the same time, the number of workers aged 25-44 decreased by 63,190 or 51.6% and the number of workers aged 15-24 decreased by 9,810 or 57.4% (figure 31 & 32). What is occurring in the manufacturing sector in terms of an aging workforce is mirrored across all sectors which showed an increase of 169,260 or 41.3% in the number of workers aged 45-64 and 41,470 or 178.2% in the number of workers aged 65+ from 2001 to 2014 (figure 33 & 34).

Figure 31
City of Toronto Residents Working in the Manufacturing Sector by Age Group
2001, 2006, 2011 & 2014

Age Group	2001	2006	2011	2014	2001 % of Total	2014 % of Total	# Change 2001 to 2014	% Change 2001 to 2014
15-24	17,100	11,820	6,370	7,290	7.9	5.0	-9,810	-57.4
25-44	122,530	90,900	62,920	59,340	56.4	40.9	-63,190	-51.6
45-64	76,110	85,310	67,490	73,590	35.1	50.7	-2,520	-3.3
65+	1,390	550	3,070	4,890	0.6	3.4	3,500	251.8
Total	217,130	188,580	139,850	145,110	100.0	100.0	-72,020	-33.2

Source: Statistics Canada's Labour Force Survey, 2001-2014.

Figure 32
City of Toronto Residents Working in Manufacturing by Age Group
2001, 2006, 2011 & 2014



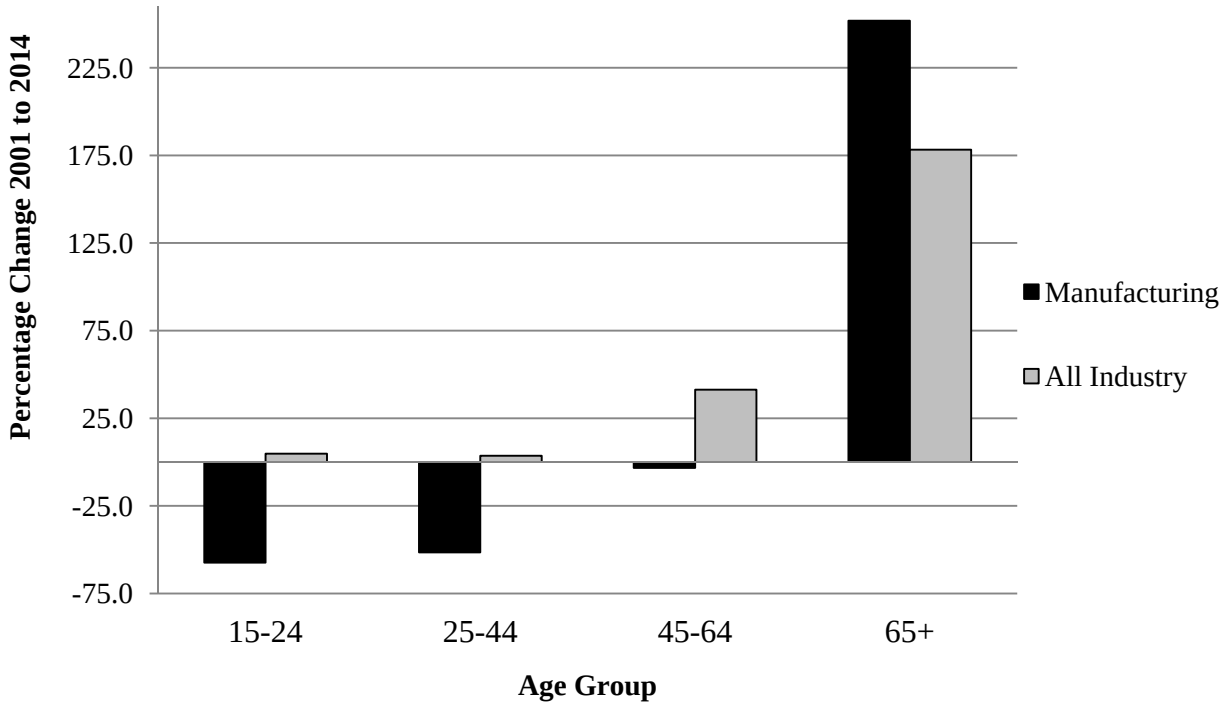
Source: Statistics Canada's Labour Force Survey, 2001-2014.

Figure 33
City of Toronto Residents Working in the Manufacturing Sector and All Industries by Age Group
2001 & 2014

Age Group	2001 All Ind.	2014 All Ind.	2001 Manuf. % of Total	2001 All Ind. % of Total	Manuf. # Change 2001 to 2014	Manuf. % Change 2001 to 2014	All Ind. # Change 2001 to 2014	All Ind. % Change 2001 to 2014
15-24	174,160	182,510	7.9	13.4	-9,810	-57.4	8,350	4.8
25-44	693,870	719,040	56.4	53.3	-63,190	-51.6	25,170	3.6
45-64	409,970	579,230	35.1	31.5	-2,520	-3.3	169,260	41.3
65+	23,270	64,740	0.6	1.8	3,500	251.8	41,470	178.2
Total	**1,301,270**	**1,545,520**	100.0	100.0	**-72,020**	**-33.2**	**244,250**	**18.8**

Source: Statistics Canada's Labour Force Survey, 2001-2014.

Figure 34
Percent Change of Residents Working in Manufacturing and All Industriesby Age Group
City of Toronto
2001 & 2014



Source: Statistics Canada's Labour Force Survey, 2001-2014.

Unemployment Rate

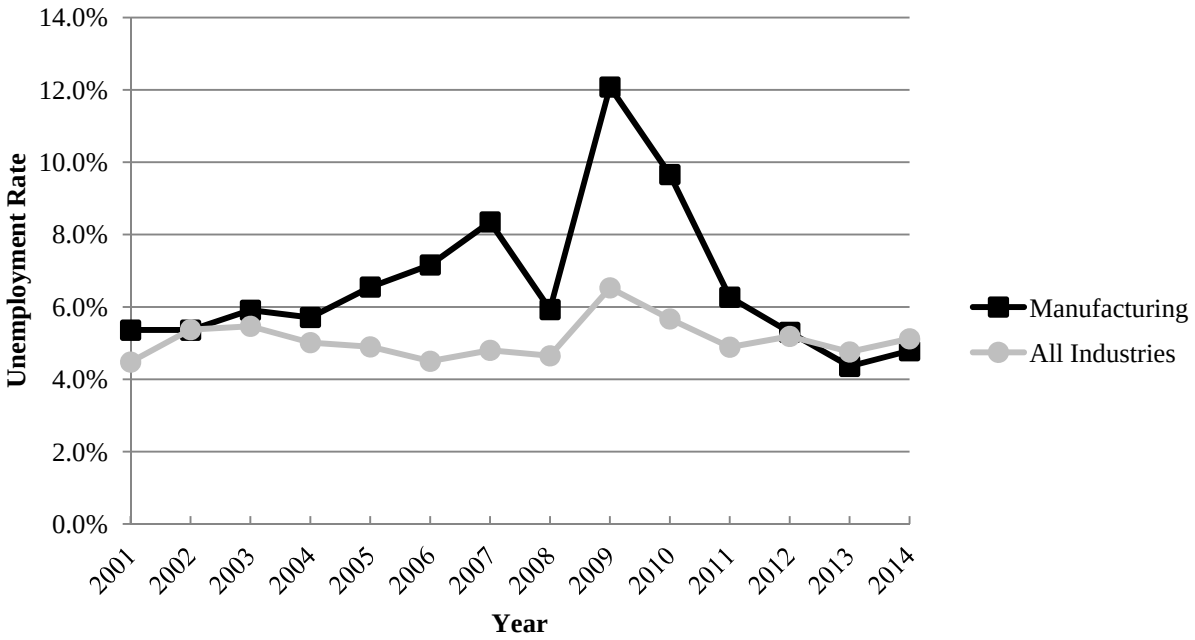
The unemployment rate of City of Toronto residents for manufacturing increased slightly from 4.36 % in 2013 to 4.79% in 2014. The unemployment rate of City of Toronto residents for all industries experienced labour force stood at 5.12% in 2014. The unemployment rate for manufacturing experienced labour force has been lower than the unemployment rate for all industries experienced labour force for most the past two years (figure 35 & 36).

Figure 35
Unemployment Rate of Residents
City of Toronto
2001 to 2014

Year	Manufacturing Experienced Labour Force Unemployment Rate*	All Industries Experienced Labour Force Unemployment Rate*	All Industries Unemployment Rate
2001	5.36%	4.48%	7.30%
2002	5.36%	5.37%	8.46%
2003	5.91%	5.47%	8.66%
2004	5.71%	5.01%	8.44%
2005	6.55%	4.90%	8.02%
2006	7.16%	4.50%	7.57%
2007	8.35%	4.80%	7.90%
2008	5.93%	4.65%	7.53%
2009	12.08%	6.53%	9.97%
2010	9.66%	5.67%	9.94%
2011	6.27%	4.89%	9.21%
2012	5.30%	5.19%	9.64%
2013	4.36%	4.76%	8.79%
2014	4.79%	5.12%	9.52%

*Note: Based on experienced labour force and does not include new entrants into the labour force. Total unemployment rate is significantly higher.
Source: Statistics Canada Labour Force Survey, 2001-2014

Figure 36
Unemployment Rate* of Residents by Industry
City of Toronto, 2001 to 2014



*Note: Based on experienced labour force and does not include new entrants into the labour force. Total unemployment rate is significantly higher.
Source: Statistics Canada Labour Force Survey, 2001-2014

Cost Competitiveness

Toronto's Competitive Advantages for Manufacturing Activity

Internationally and in relation to other large cities in North America, the Toronto region ranks very well in terms of its competitiveness for manufacturing activity.

The Toronto region offers a number of competitive advantages from a business attraction, retention and expansion perspective, including its relative cost competitiveness, the existing scale and diversity of industry, strong labour force, proximity and access to large North American markets and supply chains, good transportation networks and high quality of life. Further, the industrial land inventory of the Toronto area is the third largest in North America, making the Toronto region a draw for manufacturers taking advantage of existing concentrations and infrastructure.

In its Competitive Alternatives – 2014 Edition report, KPMG conducted an analysis of the relative costs of manufacturers doing business in 91 cities in Canada, United States and Mexico. The study measured the combined impact of 26 significant cost components that vary by location, over a 10-year horizon. The KPMG study considered international as well as regional cost advantages, including cost advantages for manufacturing industry specifically, and also

provided information on important non-cost factors that influence the business attractiveness of different locations. Aspects addressed by the study included labour availability and skills, economic conditions, innovation, infrastructure, regulatory environment, cost of living and personal quality of life factors.

Figure 37 shows the Toronto region's manufacturing cost competitiveness relative to selected other North American cities. The Toronto region fared well in cost advantage relative to the 91 international cities reviewed, ranking tied for 13th overall. It should also be noted that for the manufacturing sub-sectors reported as part of the study, the Toronto region ranked within the top 15 of 91 cities for aerospace, agri-food, automotive, chemicals, electronics, green energy, medical devices, pharmaceuticals, precision manufacturing and telecommunications (figure 37 & 38).

Figure 37
Average Cost Index of All Manufacturing Industries
Selected North American Regions, 2014

Region	Average Manufacturing Cost Index*	Rank**
Montreal PQ	92.0	9th – tied
Winnipeg MB	92.0	9th – tied
Toronto ON	93.6	13th – tied
Edmonton AB	94.0	16th – tied
Vancouver BC	94.6	21st – tied
Cleveland OH	96.3	34
Pittsburgh PA	96.4	35
Chicago IL	99.1	48
Detroit MI	98.2	44th – tied
Los Angeles CA	100.5	53
Boston MA	101.1	54
New York City	103.6	56

Note: * Business costs are expressed as an index, with the US being assigned a baseline index of 100.0. An index below 100 indicates lower costs than the US. An index over 100 indicates higher costs than the US. (e.g., an index of 95.0 represents a 5.0% cost advantage relative to the US.
, **Rank among 91 cities in mature and high growth markets in Canada, United States and Mexico
Source: KPMG Competitive Alternatives – 2014 Edition

Figure 38
Cost Advantage by Manufacturing Industry
Toronto
2014

Industry	Toronto Region's Cost Index*	Toronto Region's Rank**
Aerospace (aircraft parts)	96.4	10th - tied
Agri-Food (food processing)	96.6	10th - tied
Automotive (auto parts)	97.1	12th
Chemicals (specialty chemicals)	96.7	11th tied
Electronics (electronics assembly)	95.8	11th
Green Energy (advanced battery/fuel cells)	96.4	9th - tied
Medical Devices (medical devices manufacturing)	95.0	13th
Metal Components (metal machining)	96.5	19th
Pharmaceuticals (pharmaceutical products)	97.5	11th
Plastics (plastic products)	97.5	22nd - tied
Precision Manufacturing (precision components)	97.2	8th - tied
Telecommunications (telecom equipment)	95.8	14th
Manufacturing Average	**93.6**	**13th - tied**

Note: * Business costs are expressed as an index, with the US being assigned a baseline index of 100.0. An index below 100 indicates lower costs than the US. An index over 100 indicates higher costs than the US. (e.g., an index of 95.0 represents a 5.0% cost advantage relative to the US. , **Rank among 91 cities in mature and high growth markets in Canada, United States and Mexico
Source: KPMG Competitive Alternatives – 2014 Edition

Drilling down a little further, while a number of additional advantages are also regional in nature, manufacturers and the firms in their supply, customer and business support networks operating and expanding in the city of Toronto can take advantage of: the clustering of firms and activities in a range of sectors; a large, diverse and skilled labour force; access to public transit; and a concentration of academic, government, institutional networks and alliances to facilitate research and innovation.

Manufacturers wishing to locate or expand in Toronto also benefit from a supportive business environment, increasingly competitive property tax rates for business, various cost savings including reduced development charges for industrial development, the Imagination, Manufacturing, Innovation, Technology (IMIT/TIEG) tax incentive for eligible projects, and a variety of additional business development and assistance programs offered by the City of Toronto and other agencies and orders of government, including support for key industry sectors.

Property

Industrial Vacancy Rate

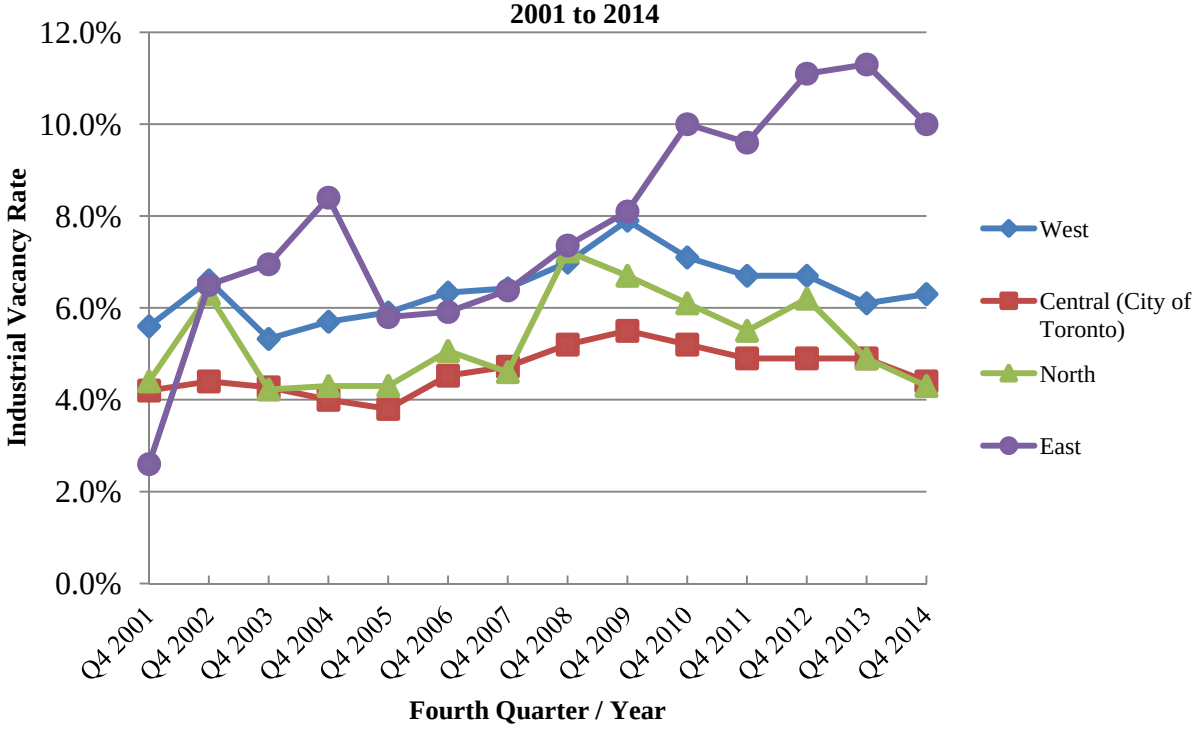
The City of Toronto industrial vacancy rate remains one of the lowest in the Greater Toronto Area (GTA). In the 4th quarter of 2014, the industrial vacancy rate was 4.4%, 1.0% lower than the GTA average of 5.4% (figure 39 & 40). The City of Toronto industrial vacancy rate has remained steady in the 4% to 5% range since 1998.

Figure 39
Industrial Vacancy Rate
Greater Toronto Area (GTA)
Fourth Quarter1998, 2003, 2008, 2013 & 2014

Region	1998 (%)	2003 (%)	2008 (%)	2013 (%)	2014 (%)
Central (City of Toronto)	4.9	4.3	5.2	4.9	4.4
East	2.0	7.0	7.4	11.3	10.0
North	4.2	4.2	7.2	4.9	4.3
West	5.3	5.3	7.0	6.1	6.3
Greater Toronto Area	**4.9**	**4.8**	**6.4**	**5.7**	**5.4**

Source: Cushman & Wakefield Ltd, 1998, 2003, 2008, 2013 & 2014

Figure 40
Industrial Vacancy Rate
Greater Toronto Area (GTA)
2001 to 2014



Source: Cushman & Wakefield Ltd, 2001-2014

Industrial Property Taxes

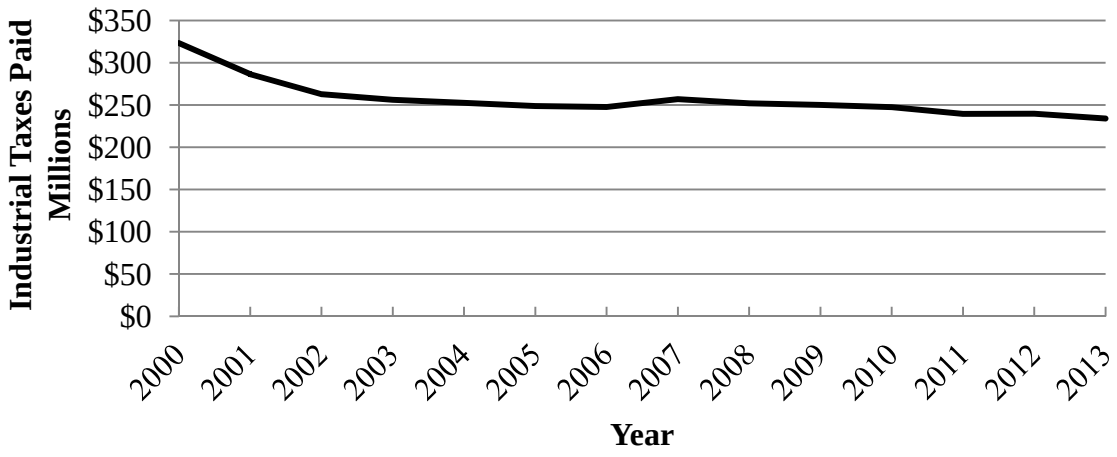
Due to a combination of a reduction in the property taxes per sq.ft. for industrial space in the City of Toronto (figure 44) and the conversion of industrial sites to non-industrial uses, the industrial property taxes paid in Toronto declined by over $5 million from 2012 to 2013 (figure 41 & 42).

Figure 41
Industrial Property Taxes Paid
City of Toronto
2000, 2003, 2008 & 2013

	2000 ($)	2003 ($)	2008 ($)	2012 ($)	2013 ($)
City of Toronto	323,352,666	256,183,705	251,994,776	239,727,697	234,022,690

Source: Ontario Ministry of Municipal Affairs and Housing, Municipal Finance Policy Branch, 2000-2013

Figure 42
Industrial Taxes Paid
City of Toronto
2000 to 2013

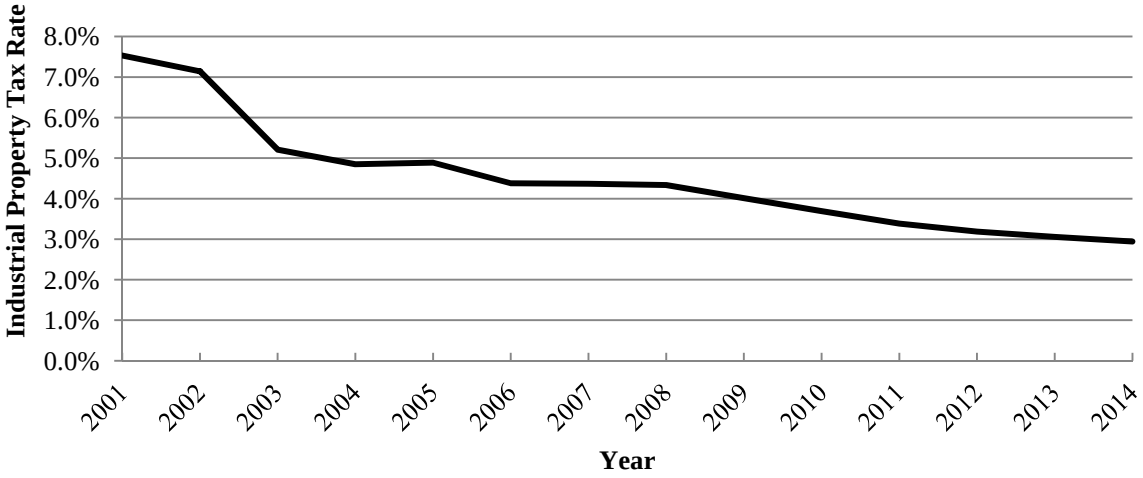


Source: Ontario Ministry of Municipal Affairs and Housing, Municipal Finance Policy Branch, 2000-2013

Industrial Property Tax Rate

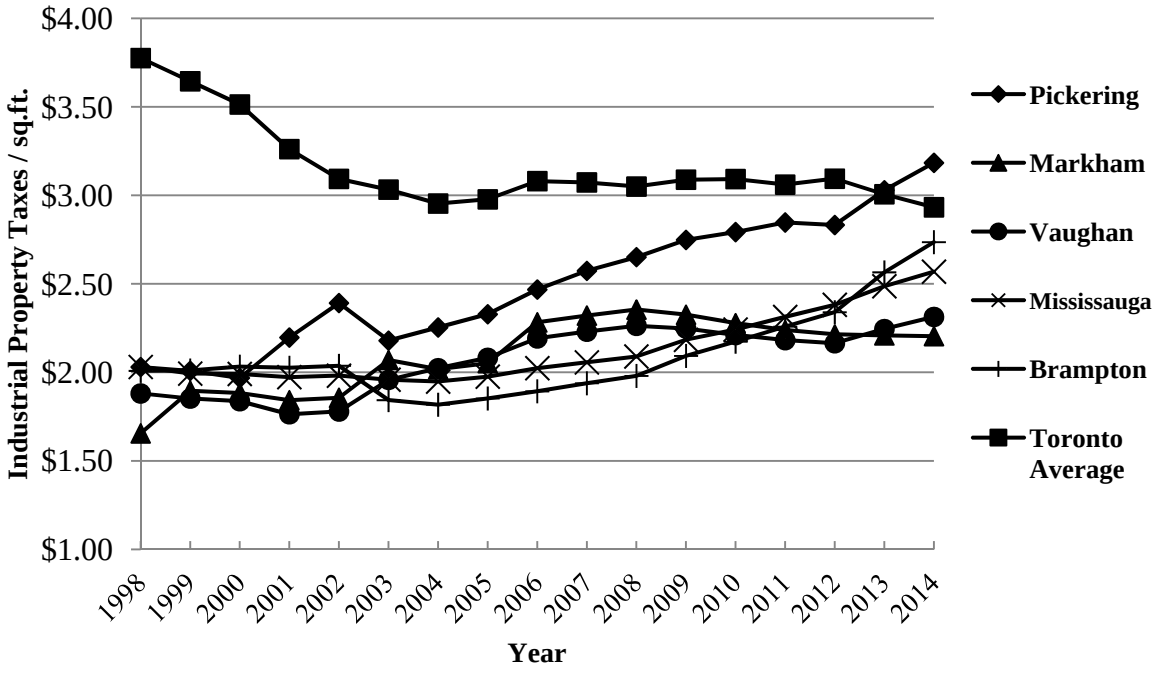
The City of Toronto industrial property tax rate has decreased from 10.66% in 1998 to 2.94% in 2014 (figure 43). The decrease in the industrial tax rate is in part a response from Toronto City Council to reduce the industrial property tax rate to a ratio 2.5 times that of residential. Only one-third of a residential property tax increase can be applied to the industrial side to reach the 2.5 times ratio target. Figure 44 shows the decrease in industrial property taxes per square foot in the City of Toronto from 1998 to 2014. Industrial property taxes have decreased from an average of $3.78/sq.ft. in 1998 to $2.93/sq.ft. in 2014, a decrease of $0.85/sq.ft. or 22.5%. Industrial property taxes/sq.ft. in Vaughan, Mississauga and Brampton, are trending upward and may surpass Toronto as Pickering did in 2013 (figure 44).

Figure 43
Industrial Property Tax Rate
City of Toronto
2001 to 2014



Source: City of Toronto, Revenue Services, 2001-2014

Figure 44
Industrial Property Taxes / sq.ft.
Selected GTA Municipalities
1998-2014



Source: City of Toronto Revenue Services, City of Toronto Economic Development and Culture, Municipal Property Assessment Corporation (MPAC), 1998-2014

Building

Value of Building Permits

The City of Toronto industrial value of building permits issued increased from1998 to 2014 by $85.2 million or 33.2%. The industrial value of building permits issued in 2014 was $341.8 million representing 4.3% of the total value of building permits (figure 45).

Figure 45
Value of Building Permits Issued
City of Toronto
1998, 2003, 2008 & 2014

Building Type	1998 ($,000)	2003 ($,000)	2008 ($,000)	2014		1998 to 2014	
				($,000)	% of Total	($,000) Change	% Change
Industrial	256,560	227,368	295,753	341,756	4.3	85,196	33.2
Residential	1,068,267	1,933,094	2,941,572	4368127	56.6	3,299,860	308.9
Commercial	713,284	872,323	1,845,628	1963987	32.9	1,250,703	175.3
Institutional	263,576	693,194	634,305	400237	6.2	136,661	51.8
Total	2,301,687	3,725,979	5,717,258	7,074,107	100.0	4,772,420	207.3

City of Toronto, Toronto Building, 1998-2014

Building Permits New Gross Floor Area (GFA)

The number of permits issued where new industrial gross floor area was added in 2014 was 42 representing 452,250 sq.ft (42.014 m^2) (figure 46).

Figure 46
Industrial Building Permits Issued, New Gross Floor Area (GFA)
City of Toronto
2001 to 2014

Year	Number of Permits Issued	Gross Floor Area (sq.ft.)	Gross Floor Area (m2)
2001	87	1,682,185	156,275
2002	58	501,130	46,555
2003	52	1,185,382	110,122
2004	71	1,672,788	155,402
2005	47	858,934	79,795
2006	57	1,611,098	149,671
2007	38	1,028,719	95,568
2008	52	1,527,190	141,876
2009	21	372,217	34,579
2010	34	275,953	25,636
2011	26	953,132	88,546
2012	41	726,766	70,861
2013	41	758,472	70,462
2014	42	452,250	42,014

Source: City of Toronto, Toronto Building, 2001-2014