

## Final Report

Prepared by Hemson for the City of Toronto

# Future of Toronto Employment Areas and the Office Market

## Appendix 2

April 7<sup>th</sup> 2022



In association with:



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## **APPENDIX 2**

### **AREA OF EMPLOYMENT PROFILES**

## **Profile 1**

**South of Eastern Area of Employment**

# South of Eastern Area of Employment

## Area Context:

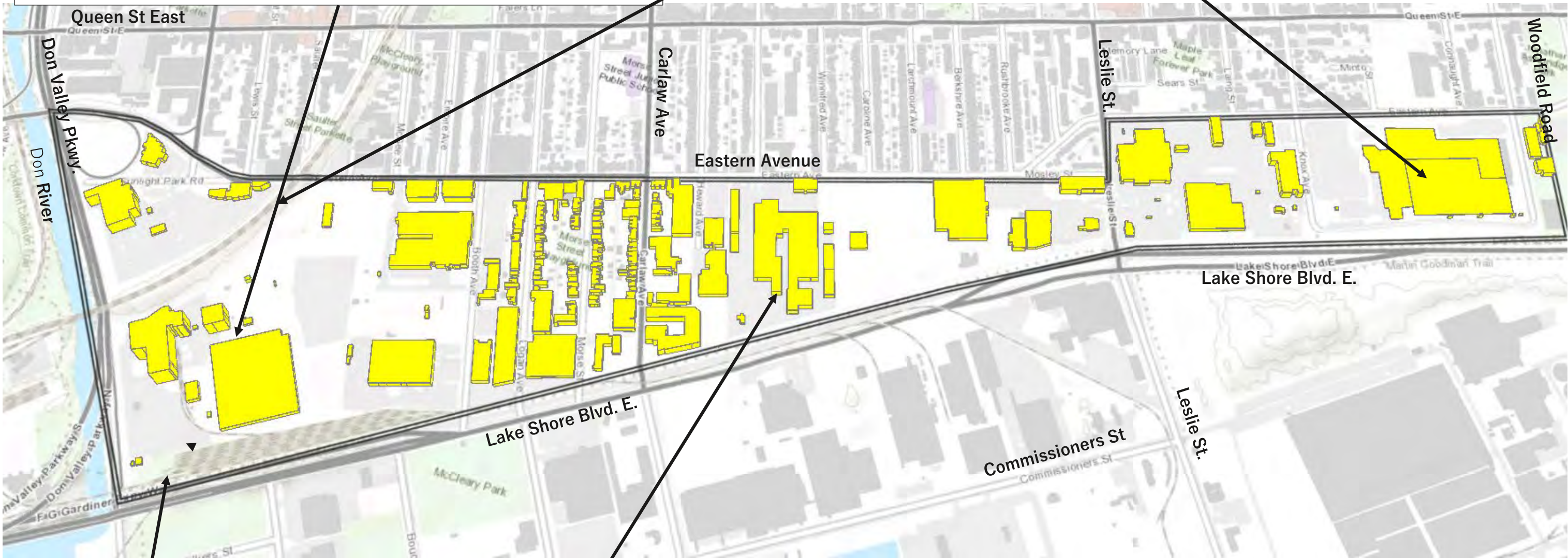
The South of Eastern area of employment is bounded by Woodfield Road to the east, the Don Valley Parkway to the west, Eastern Avenue to the north, and Lakeshore Boulevard to the south. This area has been identified under the Growth Plan as part of a Provincially Significant Employment Zone (PSEZ).

The former Unilever Soap Factory site is planned to be redeveloped as East Harbour. At 10 million square feet of commercial space, this will be one of the largest concentrations of office space outside of the Financial District. In April 2021, the Province announced a Transit Oriented Communities (TOC) partnership for the site that proposes to add residential development. An MZO to permit residential uses is anticipated to be made by the Province in early 2022.

The East Harbour Transit Hub includes facilities for both the SmartTrack/GO station and the Ontario Line station.

Canada Post is the largest employer in the area.

Key Map



Removal of the Carlaw exit from the Gardiner Expressway will lead to improved access from Lakeshore Blvd.

South of Eastern, along with the Port Lands to the south, is a Provincially Significant Employment Zone (PSEZ) where Toronto's film and television production facilities are concentrated; an industry that employs 30,000 Torontonians.

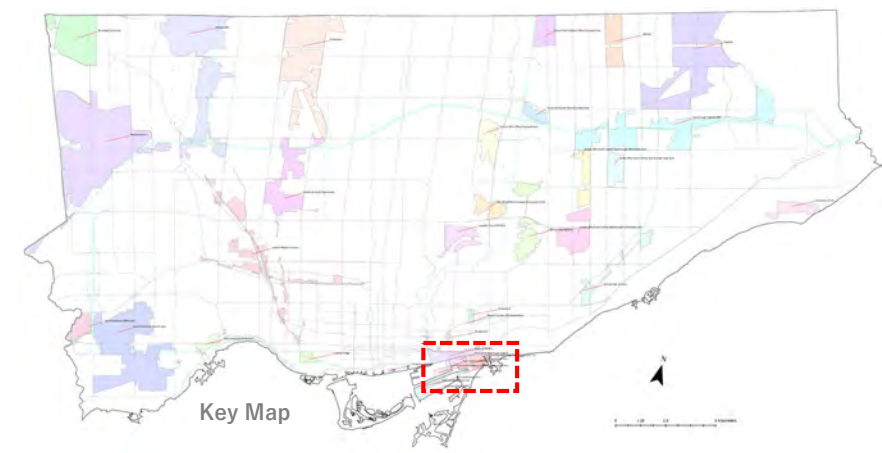
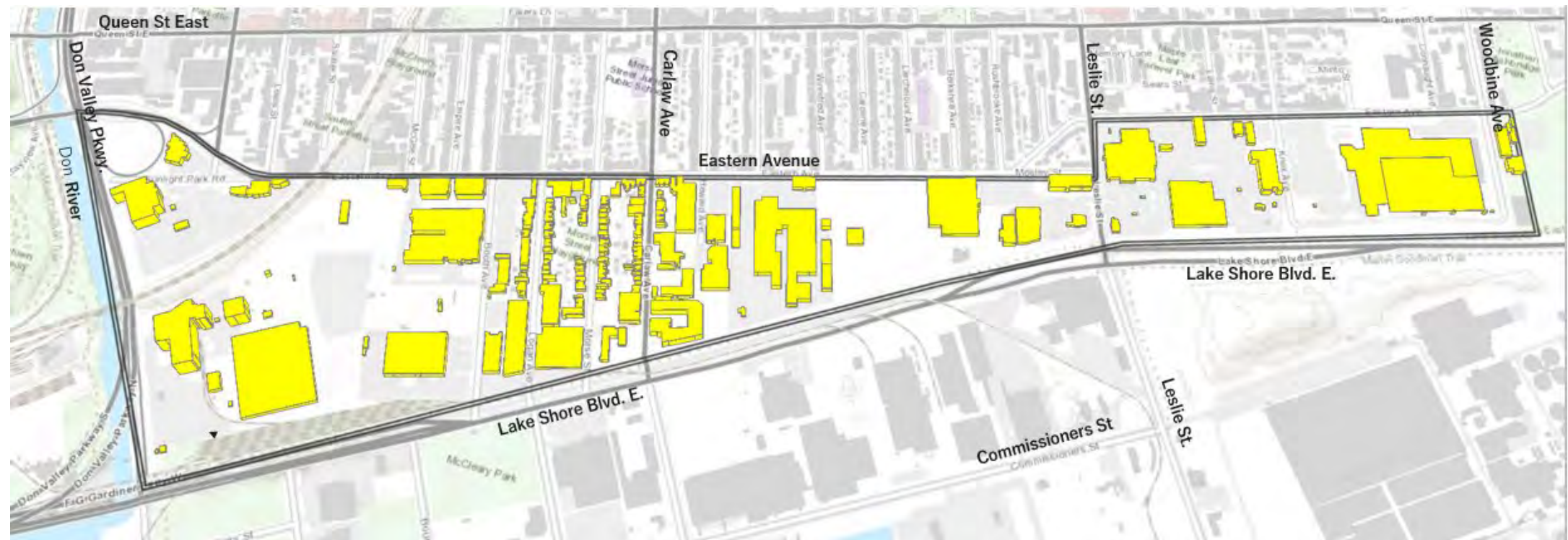
Key Facts:	
Total Land Area (net ha)	59.9 ha
Total Employment	4,757
Total Establishments	185
Rentable Building Area (Industrial)**	2.1 Million Square Feet
Vacancy Rate(2021)	1.0%
Employment Density (Net Jobs/ ha)	79.4
** Source: CoStar Group, www.costar.com	

Source: City of Toronto 3D Massing





# South of Eastern Area of Employment: Overview



- Top Employers:**

  - Canada Post
  - Revival Studios (multiple productions)
  - Loblaws
  - Toronto District School Board
  - BMW Toronto

## Function & Focus

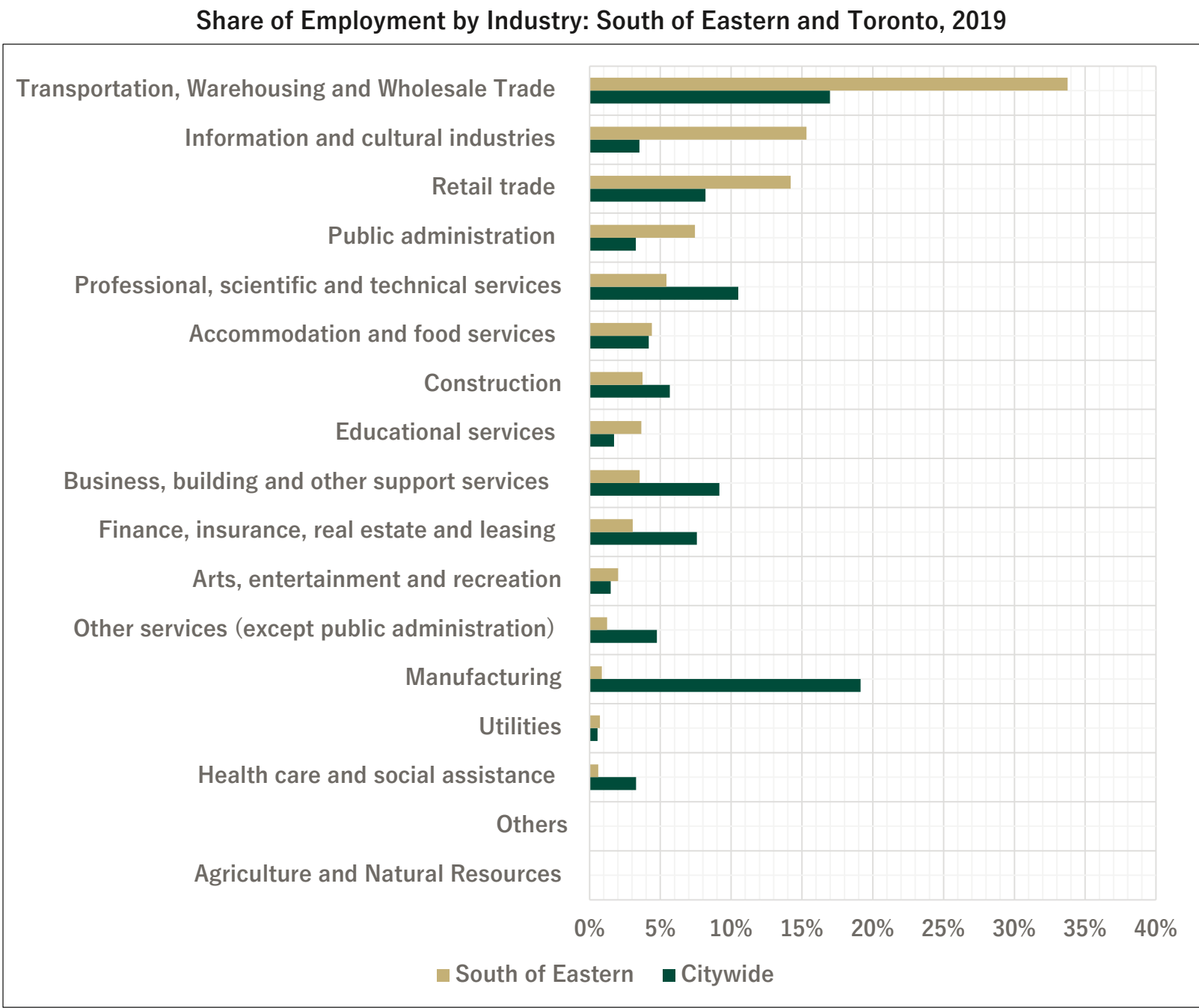
- The South of Eastern area has good access to the Don Valley Parkway and Gardiner Expressway, and is well-served by TTC surface routes. There is a number of large sites devoted to city services in the area.
- Along with facilities in the Port Lands, this is the focal point for film and television production in Toronto and related artists and businesses, including studio and a number of businesses that support the film industry such as prop suppliers and visual effects and sound studios.
- A total of 4,800 jobs are concentrated in Transportation, Warehousing & Wholesale Trade (34%) and Information & Cultural (15%) industries.
- South of Eastern saw investment of almost \$29 million in non-residential construction between 2016 and 2021.
- Currently there is over 1 million square metres (over 10 million square feet) of non-residential development proposed for this area; most tied up in the major proposal to redevelop the Unilever lands.
- Accessibility will be greatly improved with the completion of the Ontario Line subway and the SmartTrack/GO station on the Unilever lands.
- Almost three-quarters of the total workers commuting into the combined areas of South of Eastern and the Port Lands – Central Waterfront live in the City of Toronto, with 16% of those workers residing in Neighbourhood Improvement Areas.
- 16% of all these workers arrive by transit, while 8% arrive by bike or on foot.

## Outlook

- The locational characteristics underpin a positive outlook for this employment area, including potential demand for alternative employment uses given proximity to Downtown.
- There are four conversion applications in South of Eastern, and its proximity to Downtown could lead to conversion pressure building over time.



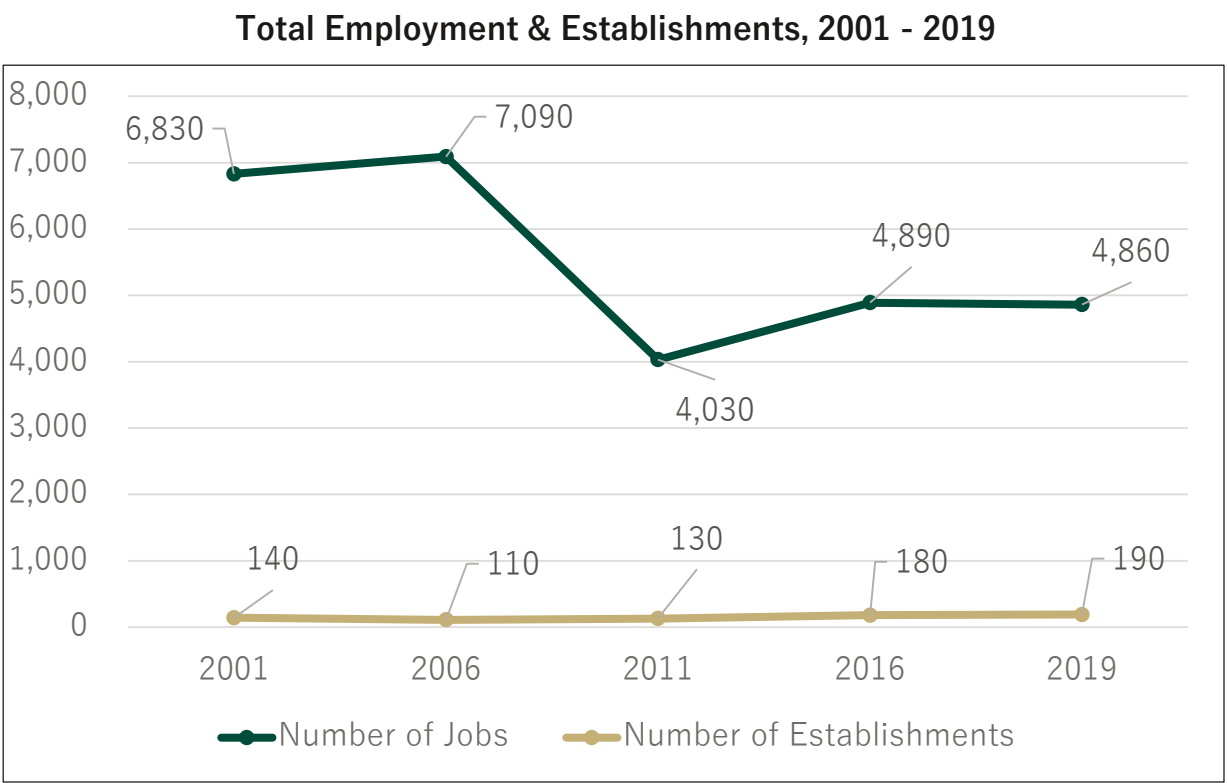
Share of Employment by Industry: South of Eastern and Toronto, 2019



Source: City of Toronto Employment Survey, 2019

NAICS Categories	Number of Jobs
Transportation, Warehousing and Wholesale Trade	1,610
Information and cultural industries	730
Retail trade	680
Public administration	350
Professional, scientific and technical services	260
Accommodation and food services	210
Construction	180
Educational services	170
Business, building and other support services	170
Finance, insurance, real estate and leasing	150
Arts, entertainment and recreation	100
Other services (except public administration)	60
Manufacturing	40
Utilities	40
Health care and social assistance	30
Agriculture and Natural Resources	0
Others	100
Total	4,860

Source: City of Toronto Employment Survey, 2019

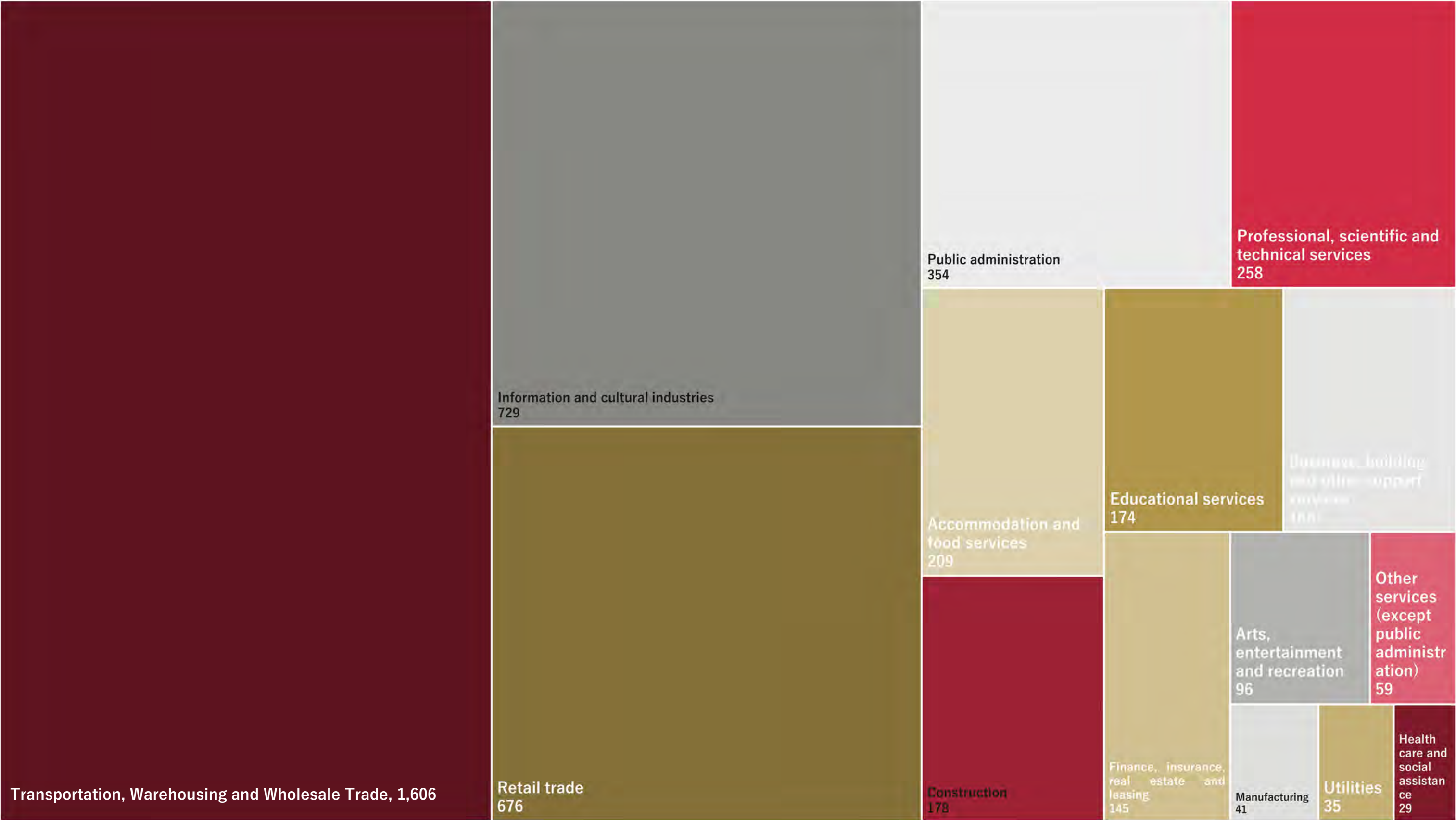


Source: City of Toronto Employment Survey, 2001 - 2019

Toronto Employment Survey data is confidential and has been provided solely for the purpose of this Study. Aggregated information is available in the [TES Bulletin](#) or on request from City of Toronto Planning, Planning Research and Analytics.



Total Employment by Industry (NAICS), 2019

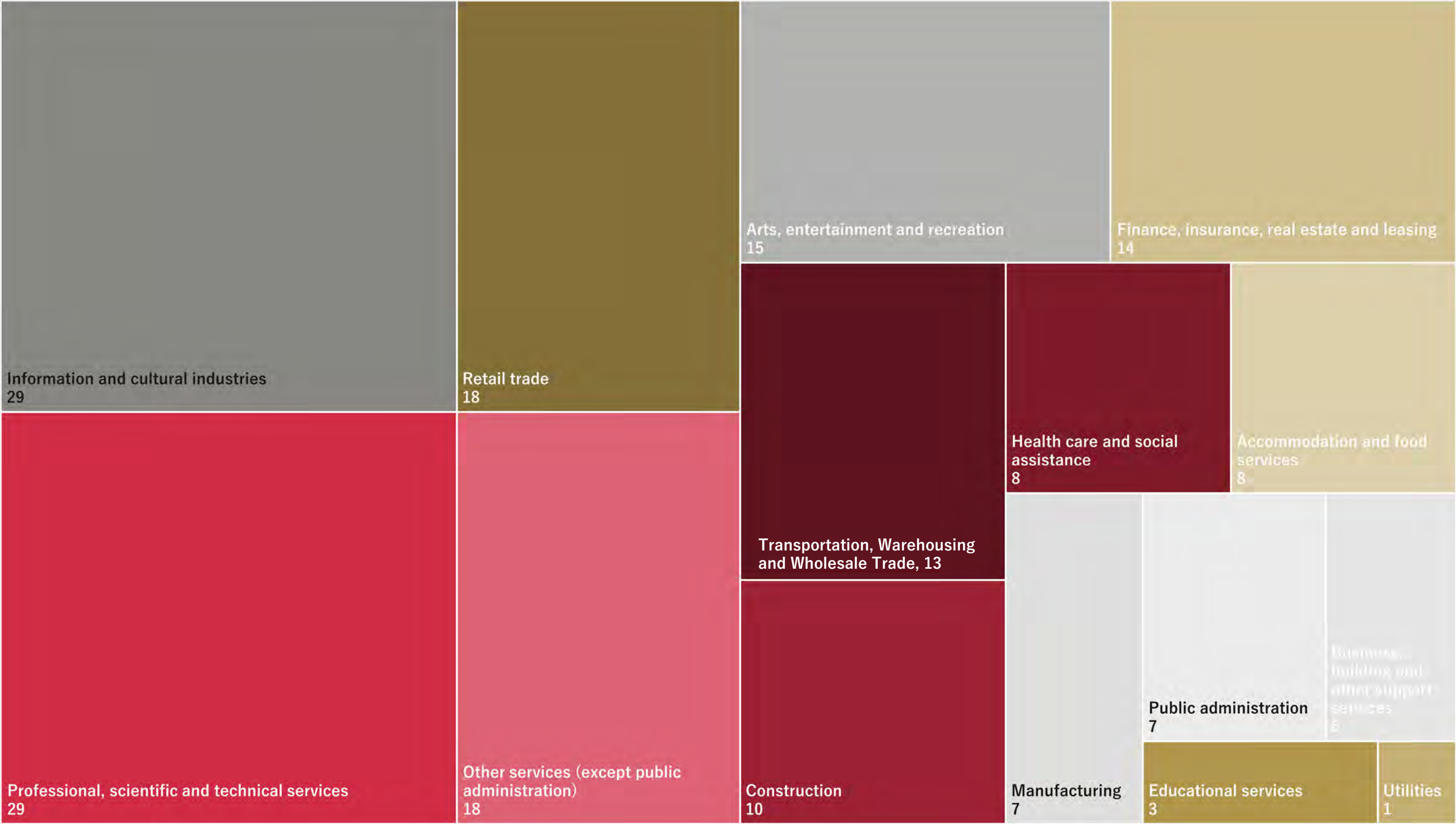


\*NAICS: "North American Industry Classification System, v 3.0 2017

Source: Toronto Employment Survey, 2019



Total Establishments by Industry (NAICS), 2019

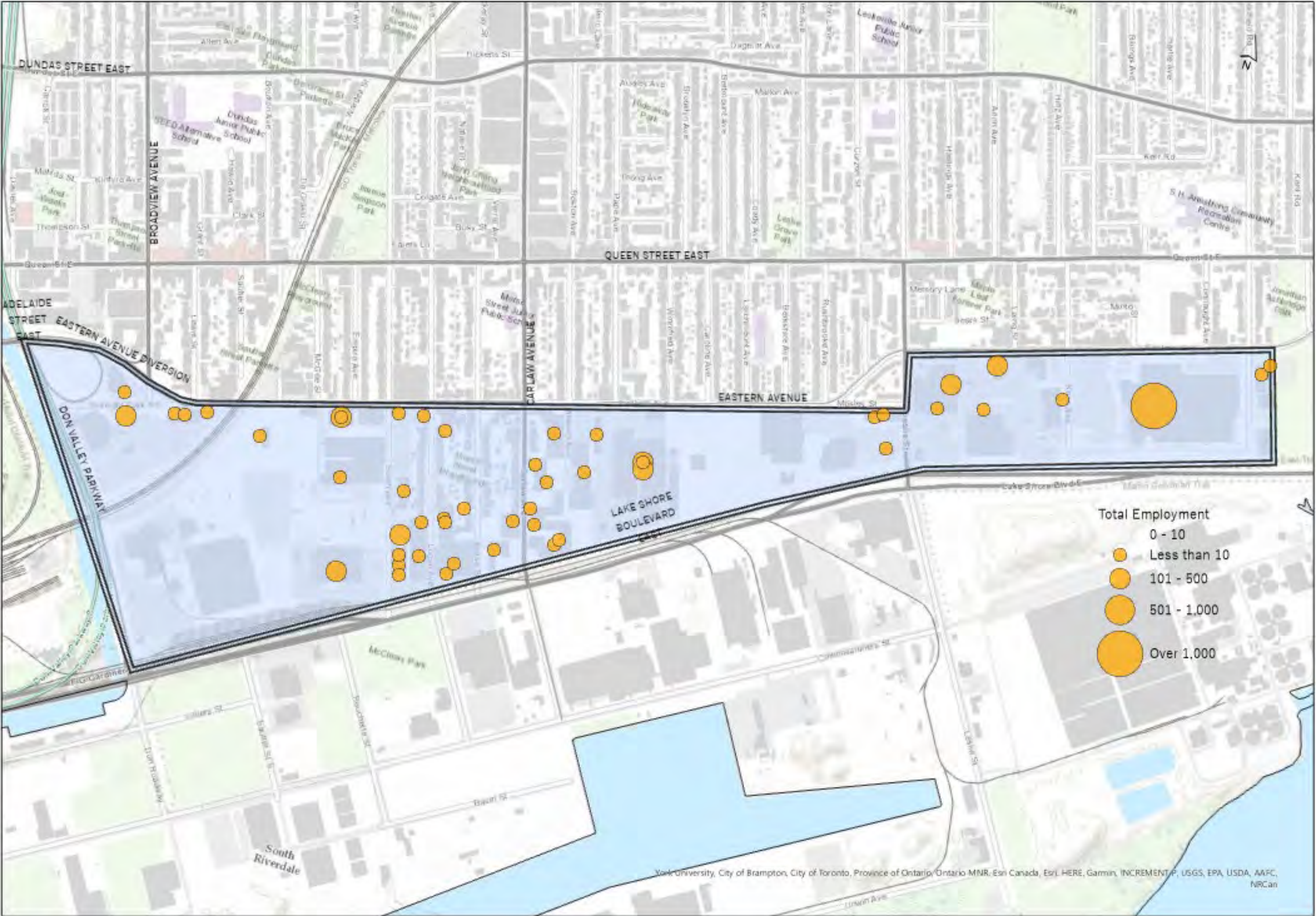


\*NAICS: "North American Industry Classification System, v 3.0 2017

Source: Toronto Employment Survey, 2019



# Employment and Establishments in South of Eastern Area of Employment

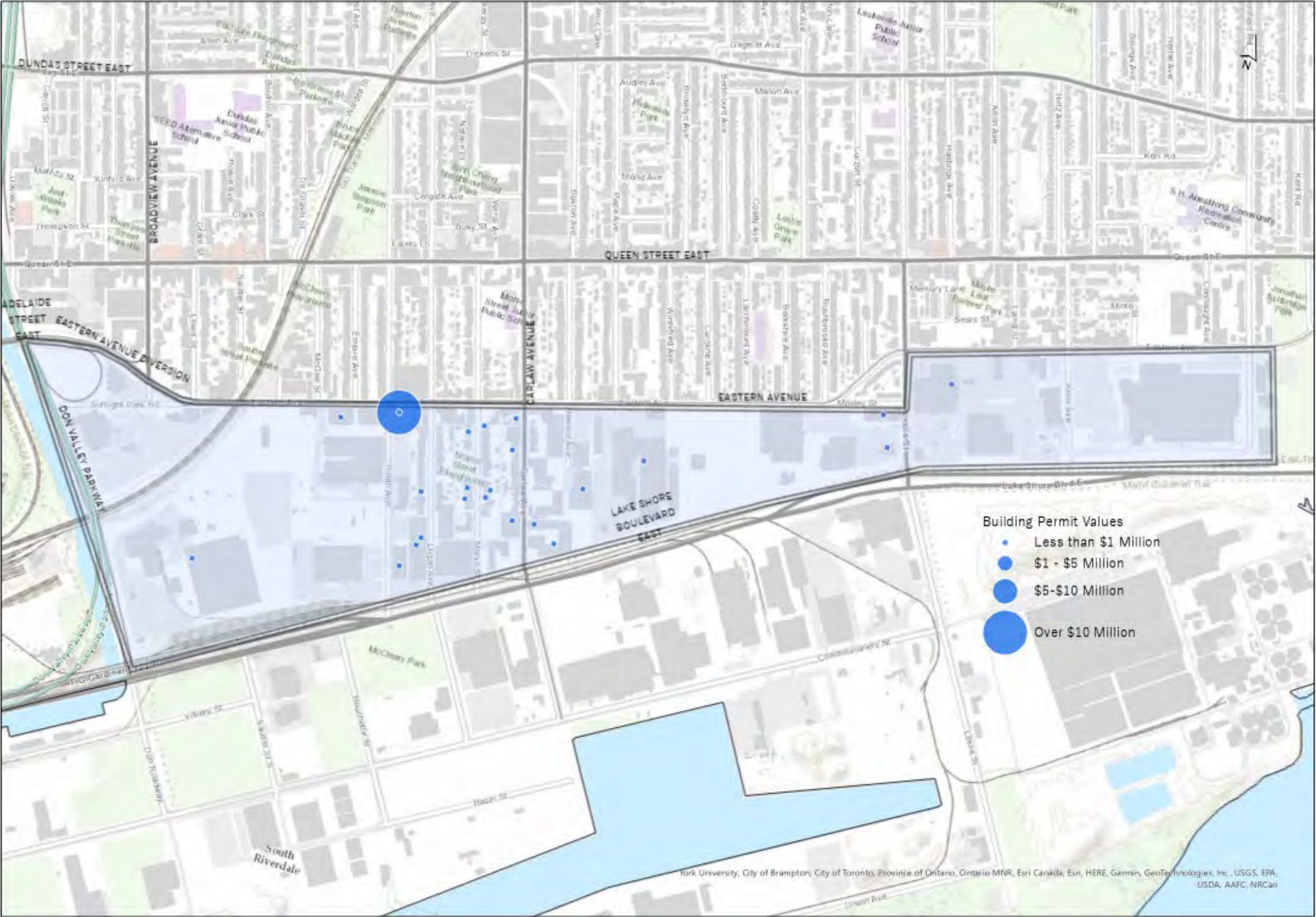


Total Employment by Size of Establishment, 2019

Source: City of Toronto Employment Survey



Value of Non-Residential Building Permits, 2016-2019 in South of Eastern Area of Employment



Total Value of Non-Residential Building Permits, 2016-2019 (\$ ,000s) \$ 28,943

New Buildings	\$13,800
Interior Alterations	\$8,918
Additions	\$2,177
Multiple Projects	\$4,048
Demolition	\$0

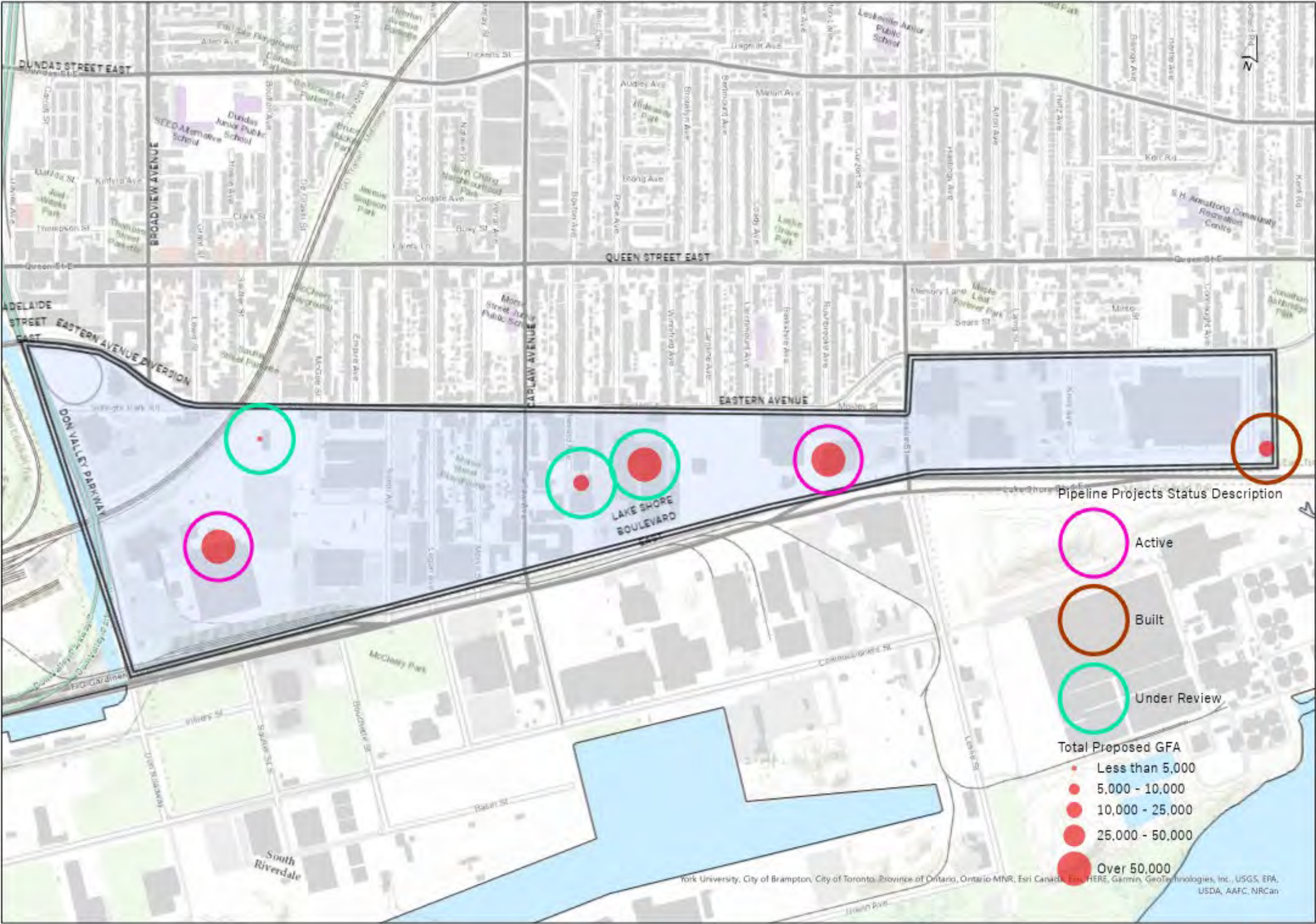
Value of Non-Residential Building Permits, 2016 – 2021

Source: City of Toronto, Building Permits





Non-Residential Development Proposals by Status, Q2-2021



Total Non-Residential GFA in  
Proposed Developments  
1,120,550 (Square Meters)

Active	999,710
Built	12,060
Under Review	108,780

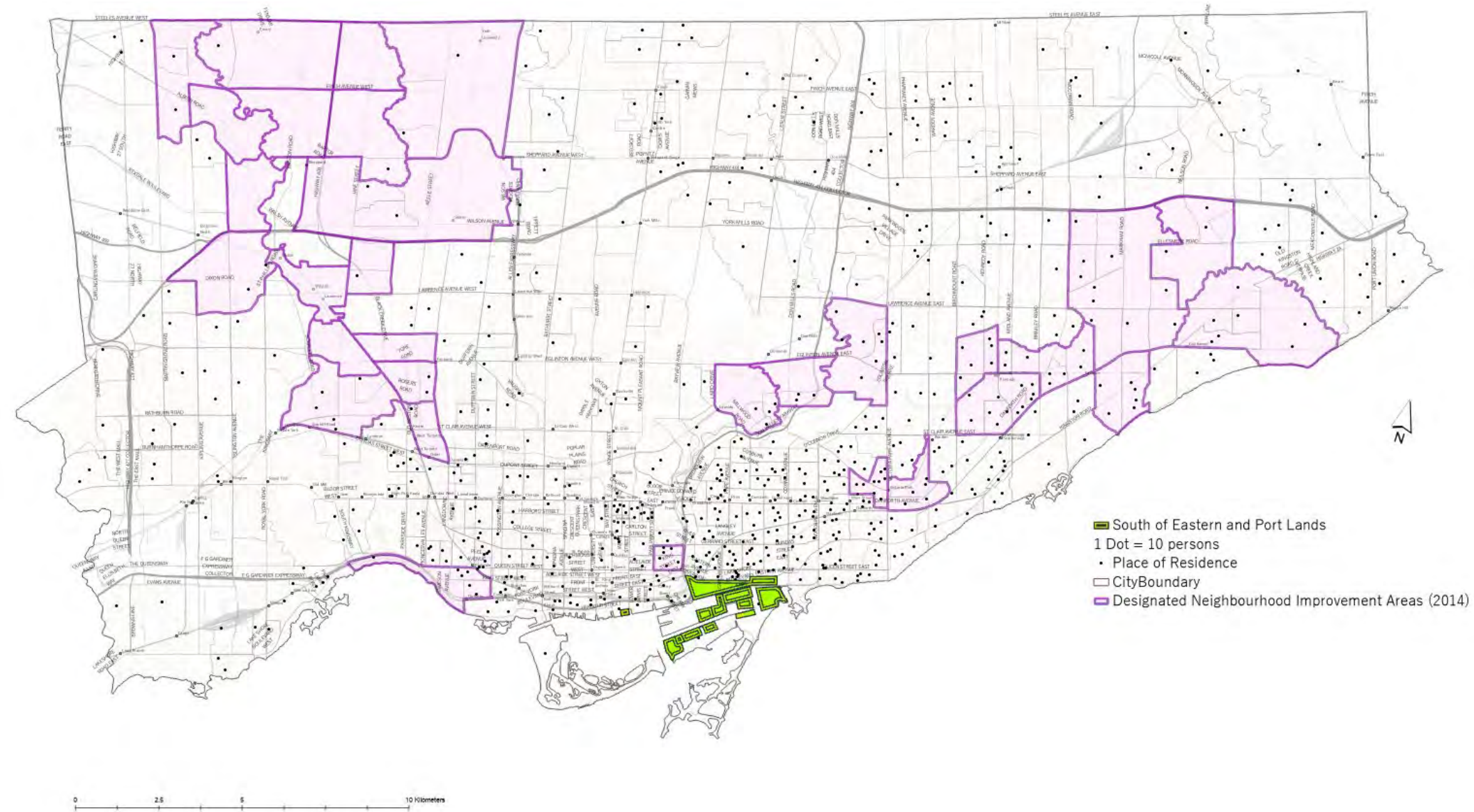
Non-Residential Development Proposals by Status

Source: City of Toronto Development Pipeline





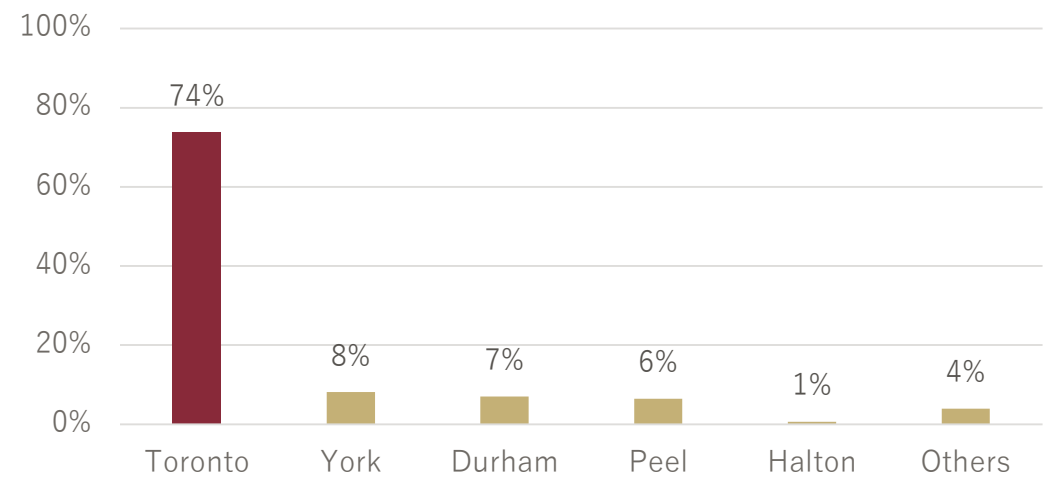
# Place of Residence for Workers in South of Eastern & Port Lands-Central Waterfront Area of Employment



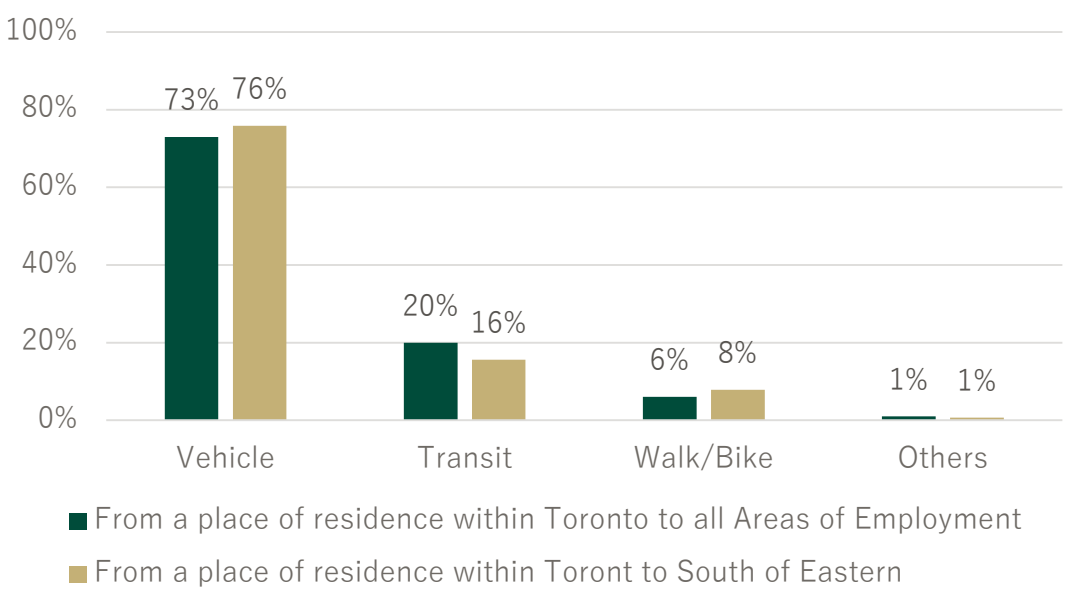
16% of the share of the combined workforce for South of Eastern and the Port Lands –Central Waterfront who reside in Toronto live in Neighbourhood Improvement Areas.

Commuting patterns for the South of Eastern and Port Lands - Central Waterfront Employment Areas are combined due to data constraints.

Percent Distribution of Place of Residence



Mode of Transport of Commuters from Within Toronto to All Areas of Employment Compared to South of Eastern



Source: Statistics Canada, Place of Work Status- 2016 Census



## **Profile 2**

### **Rexdale – Airport Area of Employment**



# Rexdale - Airport Area of Employment

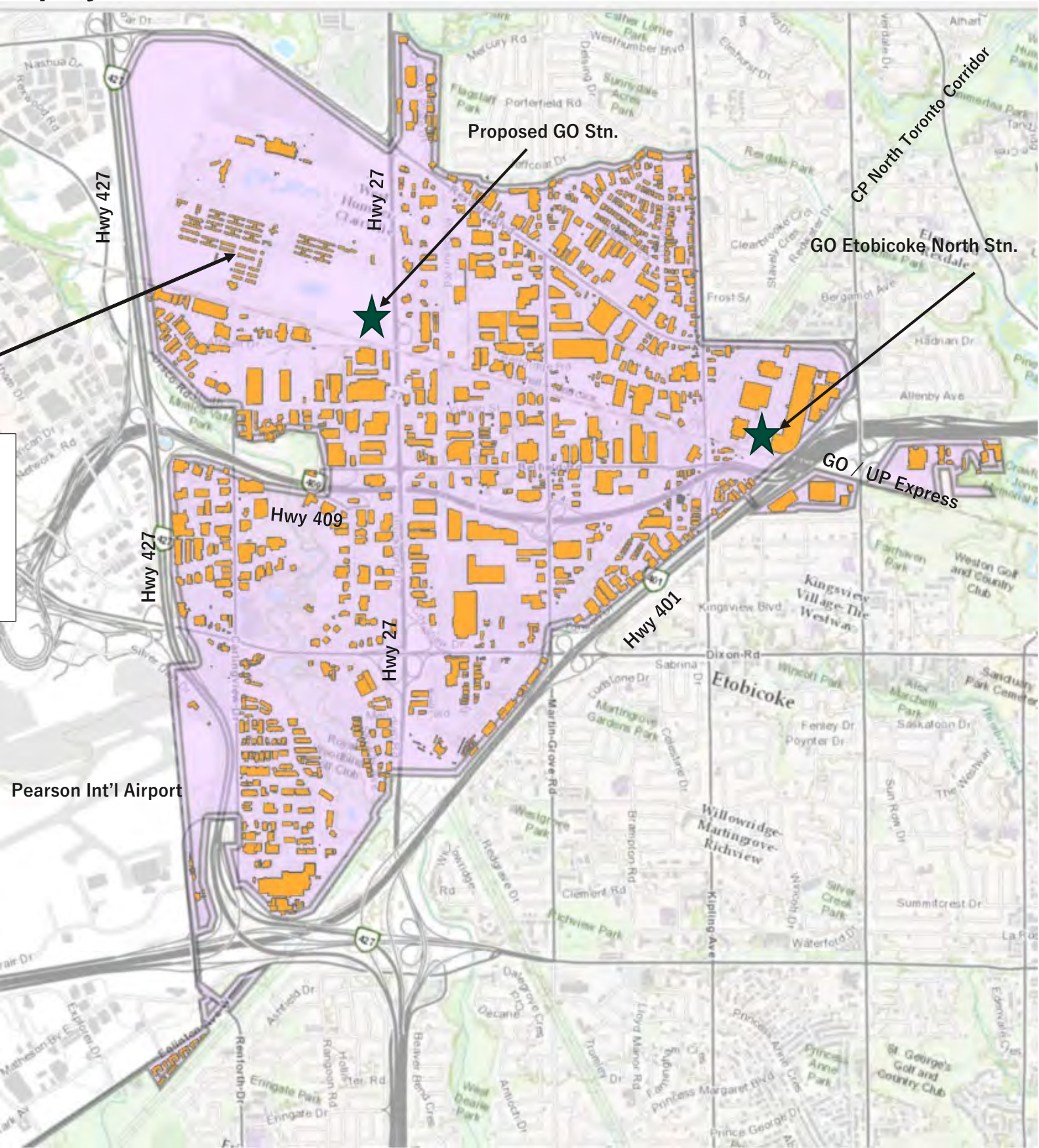
## Area Context

The Rexdale-Airport Employment area is bounded by Highways 401 to the south and 427 to the west, Islington Avenue to the east and Rexdale Boulevard and Berry Creek to the north. Two small areas of employment land just beyond these boundaries have been included in this statistical profile.<sup>1</sup>

The largest employer is Woodbine Entertainment Group located at the north end of the Employment Area. Woodbine is by far the largest site and is currently the subject of a major development proposal.

Rexdale is part of a much larger Provincially Significant Employment Zone (PSEZ) centred on Pearson International Airport. This PSEZ stretches from Islington Ave. and Highway 401 in Toronto to west of Hurontario in Mississauga and from south of Eglinton Avenue to north of Highway 407 and extending north of Williams Parkway in east Brampton.

Within the Lester B. Pearson International Airport Operating Area (SASP 29), new development for residential and other sensitive uses is prohibited.



Source: City of Toronto 3D Massing



Key Map

## Key Facts:

Total Land Area (net ha)	1,052.3 ha
Total Employment	44,847
Total Establishments	1,650
Rentable Building Area** (Industrial)	26.8 million sq. ft.
Vacancy Rate(2021)	3.7%

Employment Density	42.6 jobs/net ha
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\*\* Source: CoStar Group, [www.costar.com](http://www.costar.com)

## Top Employers:

- Woodbine Entertainment Group
- Purolator Courier
- Molson Brewery (office & plant)
- Life Labs Inc.
- Sunwing Travel Group

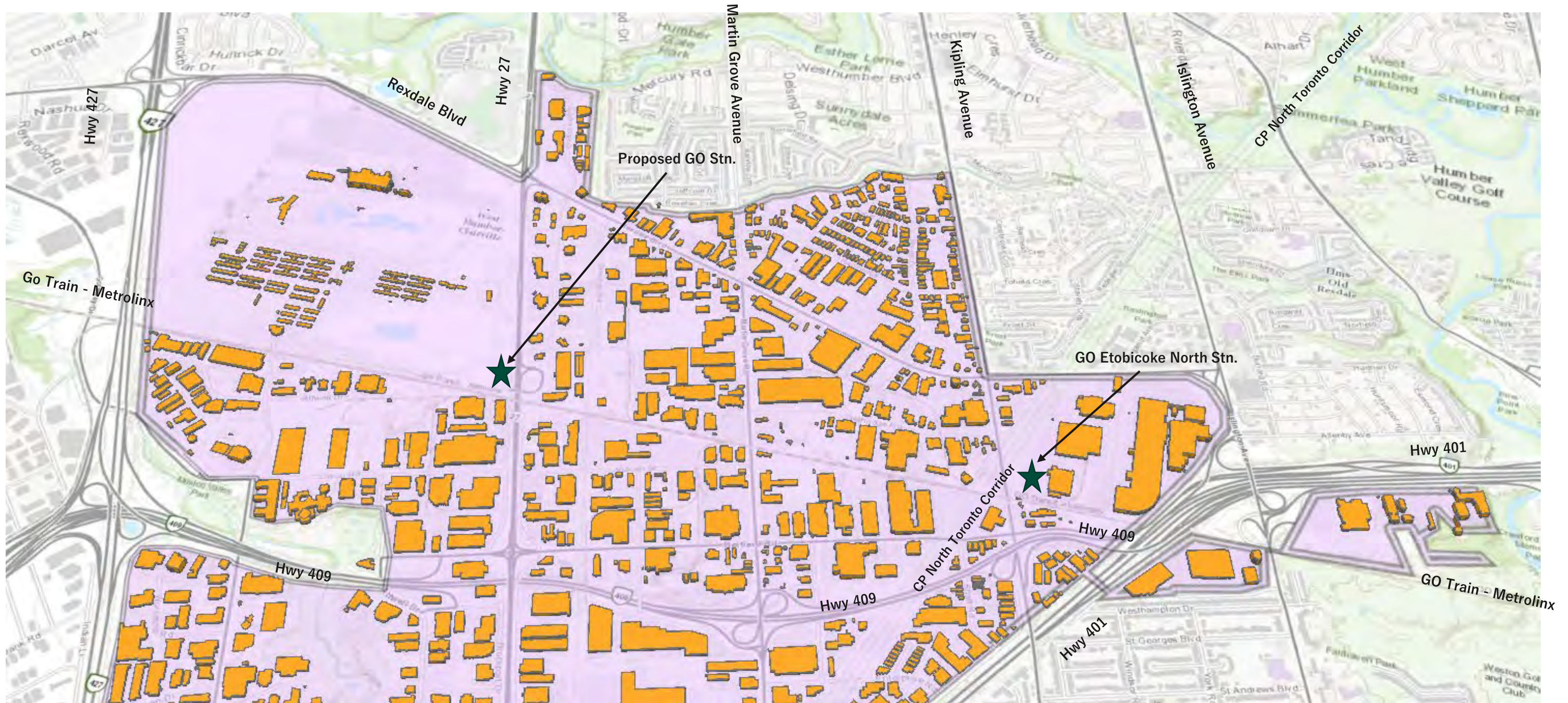
<sup>1</sup> Jobs found in moderate scale office buildings on the south side of Eglinton Avenue between Mimico Creek and Etobicoke Creek associated with the Pearson Airport office node, and an area of employment land west of Islington Avenue between Highway 401 and the rail corridor south of the highway are included in the statistics presented here.



# Rexdale - Airport Area of Employment

## Function & Focus

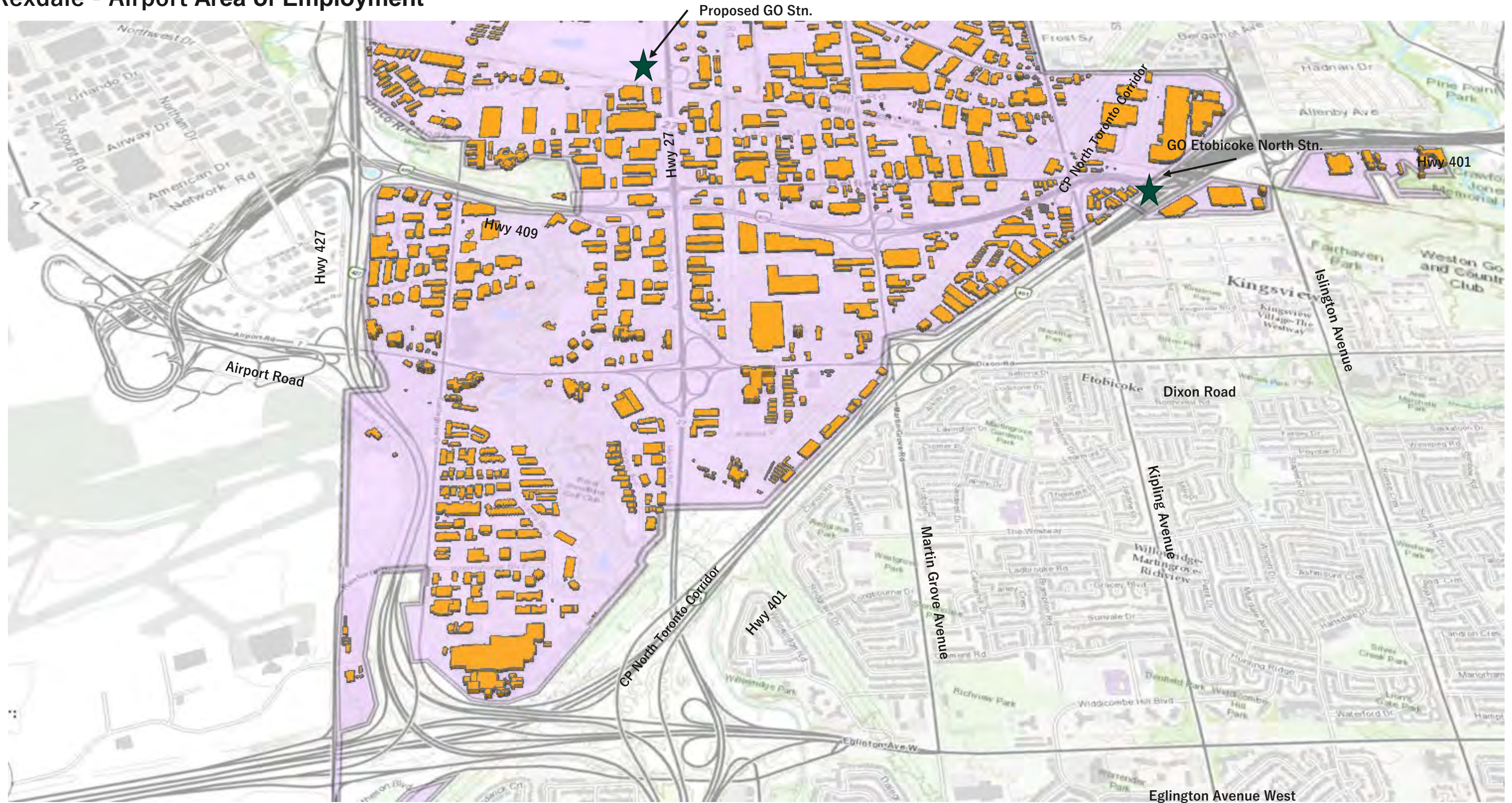
- The Rexdale-Airport area of employment has excellent access to highway, rail and air transport routes. For commuters, the area is well-served by TTC bus routes as well as the Etobicoke North GO transit station.
- The area includes a cluster of 4 million square feet of office properties known as the Airport submarket.
- The industrial function is characterized by a wide mix of industries showing demand for skilled labour, along with transportation and logistics.



- The office market here is a corporate environment with a mix of international and regional companies across a range of industries.
- Two-thirds of the office inventory is Class B. Reinvestment by landlords is necessary to remain competitive.
- Total employment here was 45,000 in 2019; an increase of 4,376 jobs representing growth of 10.8% since 2011. Almost half of this growth in jobs from 2011 to 2019 has been concentrated in the Business, Building and other Support Services sector.



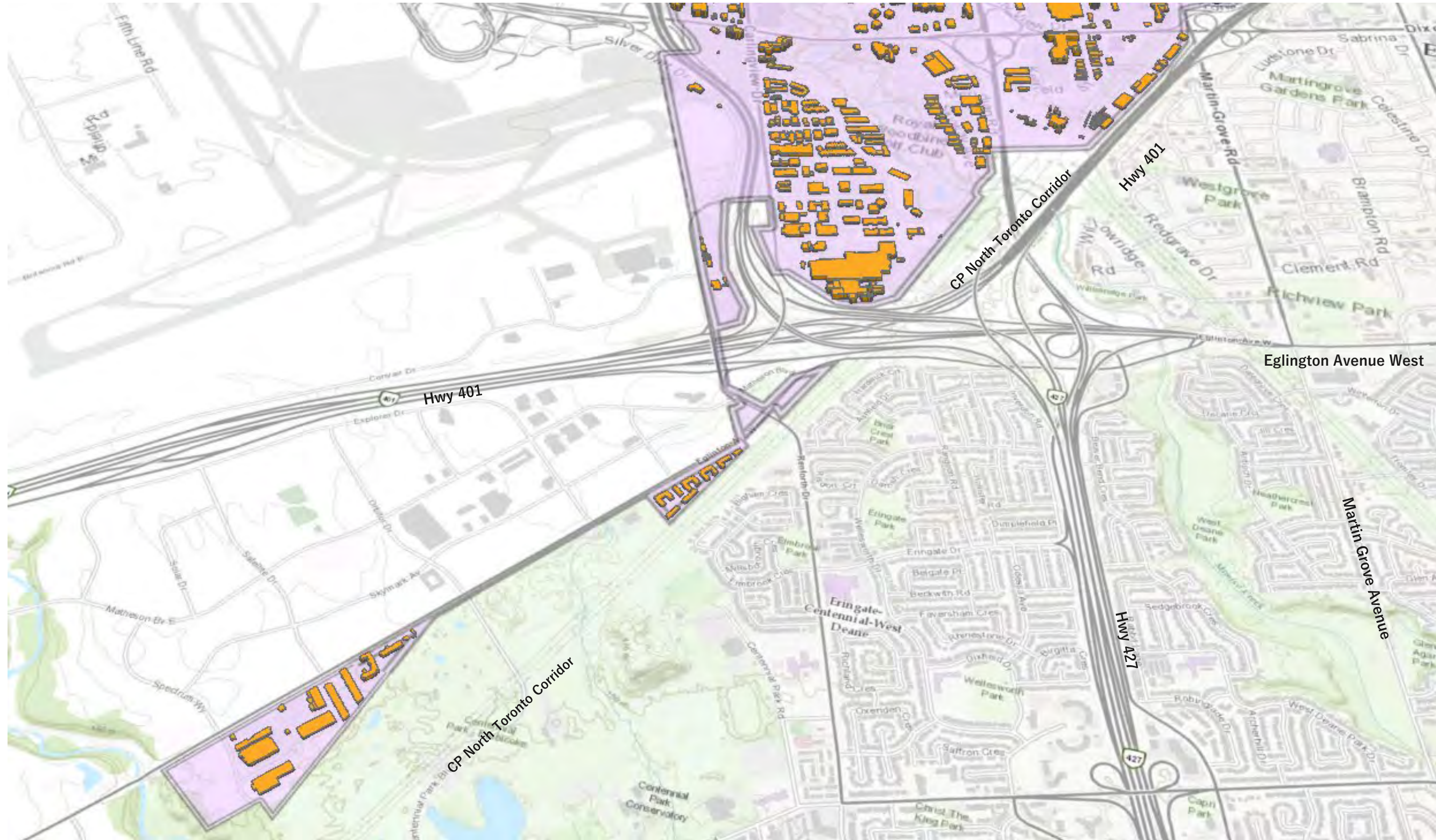
## Rexdale - Airport Area of Employment



- With an occupied land base of over 1,000 ha comprising all building types, there is close to 27 million sq. ft. of industrial rentable building space available. Demands for space have pushed the vacancy rate down from 8.1% in 2011 to 3.7% in 2021. The past five years has seen \$317 million invested towards new industrial and commercial building construction, in addition to almost \$370 million in alterations and additions to existing buildings.
- Currently there is over 434,000 m<sup>2</sup> of non-residential development proposed for this Employment Area.
- 50% of all workers in the Rexdale-Airport area reside in the City of Toronto with one-third of those residing in Neighbourhood Improvement Areas.
- Almost 80% of Toronto commuters to the Rexdale-Airport area arrive by private vehicle while 19% use transit and 2% walk.



## Rexdale - Airport Area of Employment



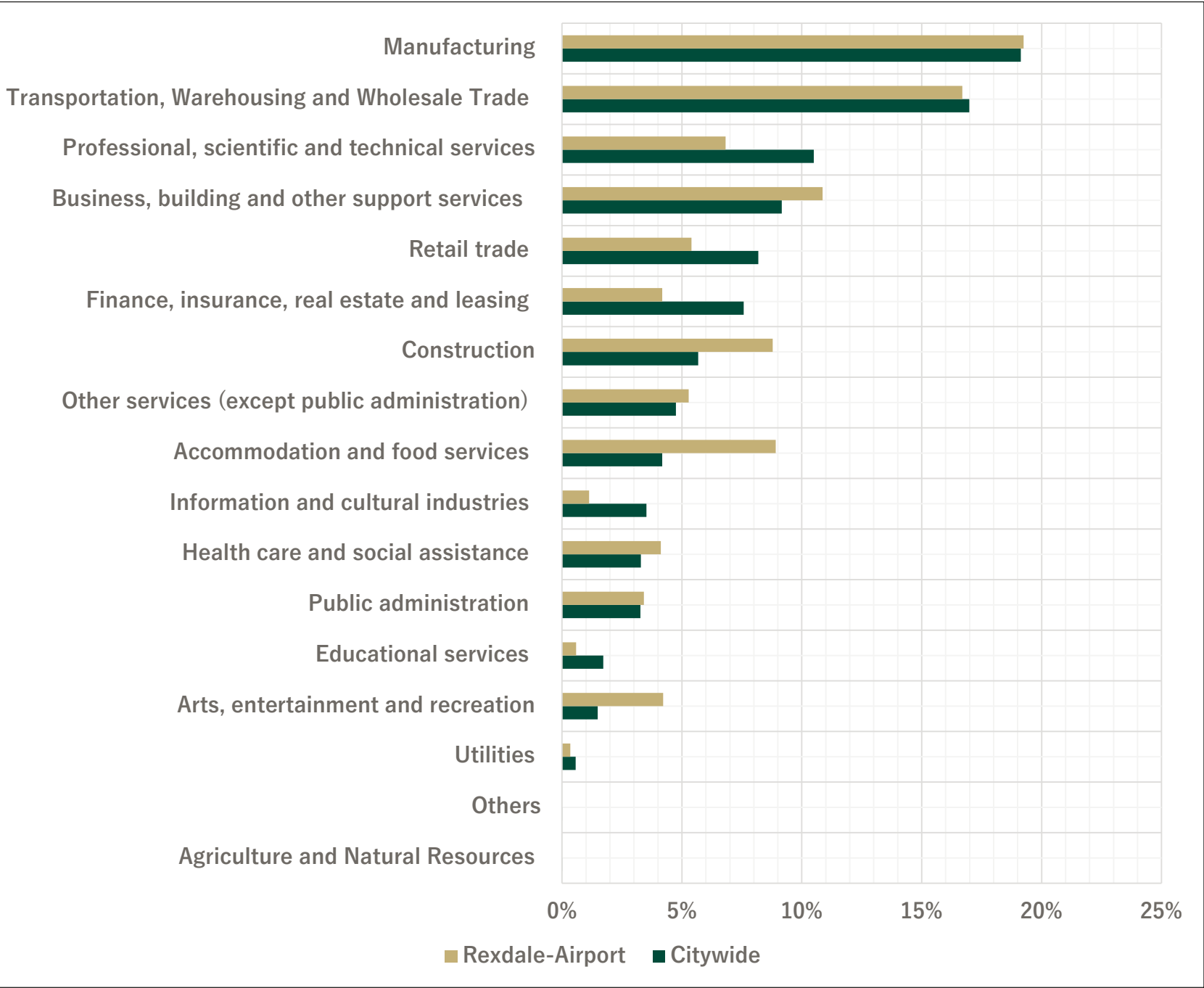
### Outlook

- Adjacency to the airport is an advantage for both the industrial and office markets here.
- Strong demand is anticipated to continue for industrial space, particularly for distribution and light manufacturing.
- Businesses with high shipping traffic prefer this area due to the access to the 400-series highway network. Labour-intensive businesses also prefer this area.
- Pearson International Airport is a Global Hub that, in tandem with the surrounding employment area, helps move products, goods and services.
- Prevailing strong demand for industrial land and buildings is triggering interest in replacing older office buildings with new industrial facilities.



# Share of Employment by Industry: Rexdale and Toronto, 2019

Share of Employment by Industry: Rexdale-Airport and Toronto, 2019



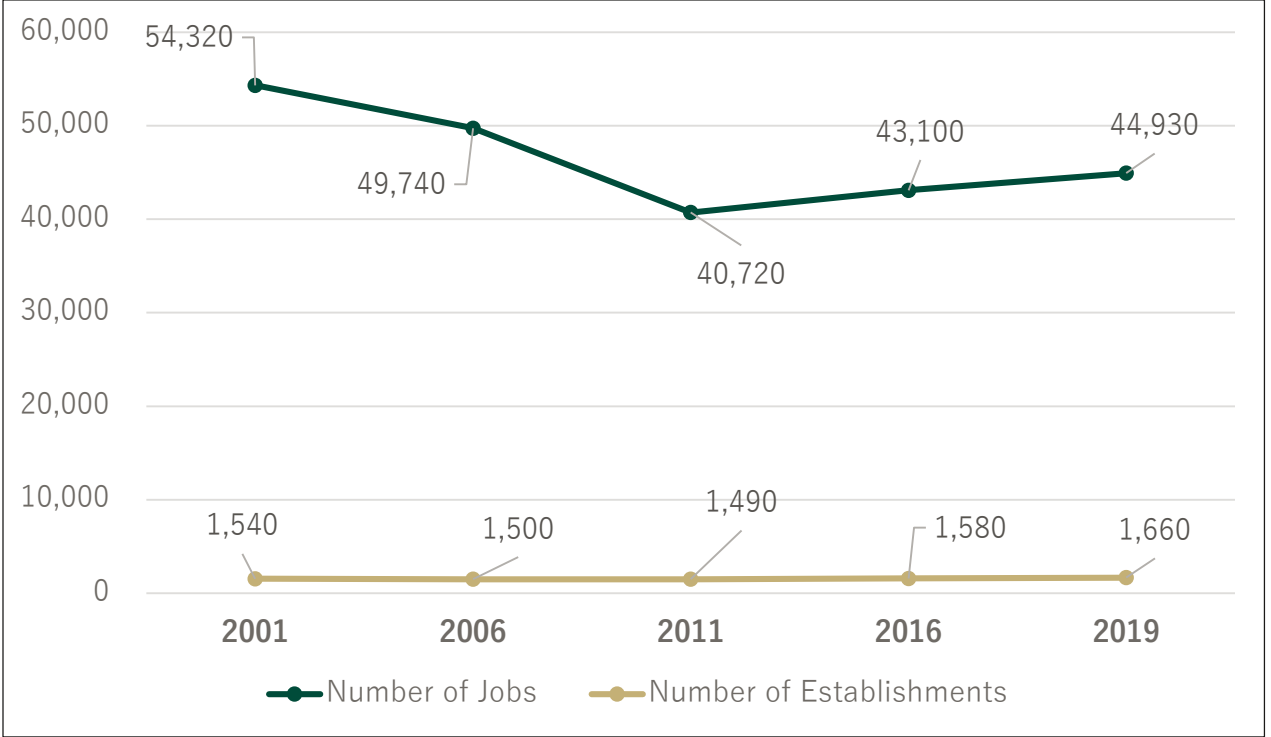
Source: City of Toronto Employment Survey, 2019

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NAICS Categories	Number of Jobs
Manufacturing	8,630
Transportation, Warehousing and Wholesale Trade	7,490
Business, building and other support services	4,870
Accommodation and food services	4,000
Construction	3,940
Professional, scientific and technical services	3,060
Retail trade	2,420
Other services (except public administration)	2,370
Arts, entertainment and recreation	1,890
Finance, insurance, real estate and leasing	1,870
Health care and social assistance	1,850
Public administration	1,530
Information and cultural industries	510
Educational services	260
Utilities	160
Agriculture and Natural Resources	0
Others	0
Total	44,850

Source: City of Toronto Employment Survey, 2019

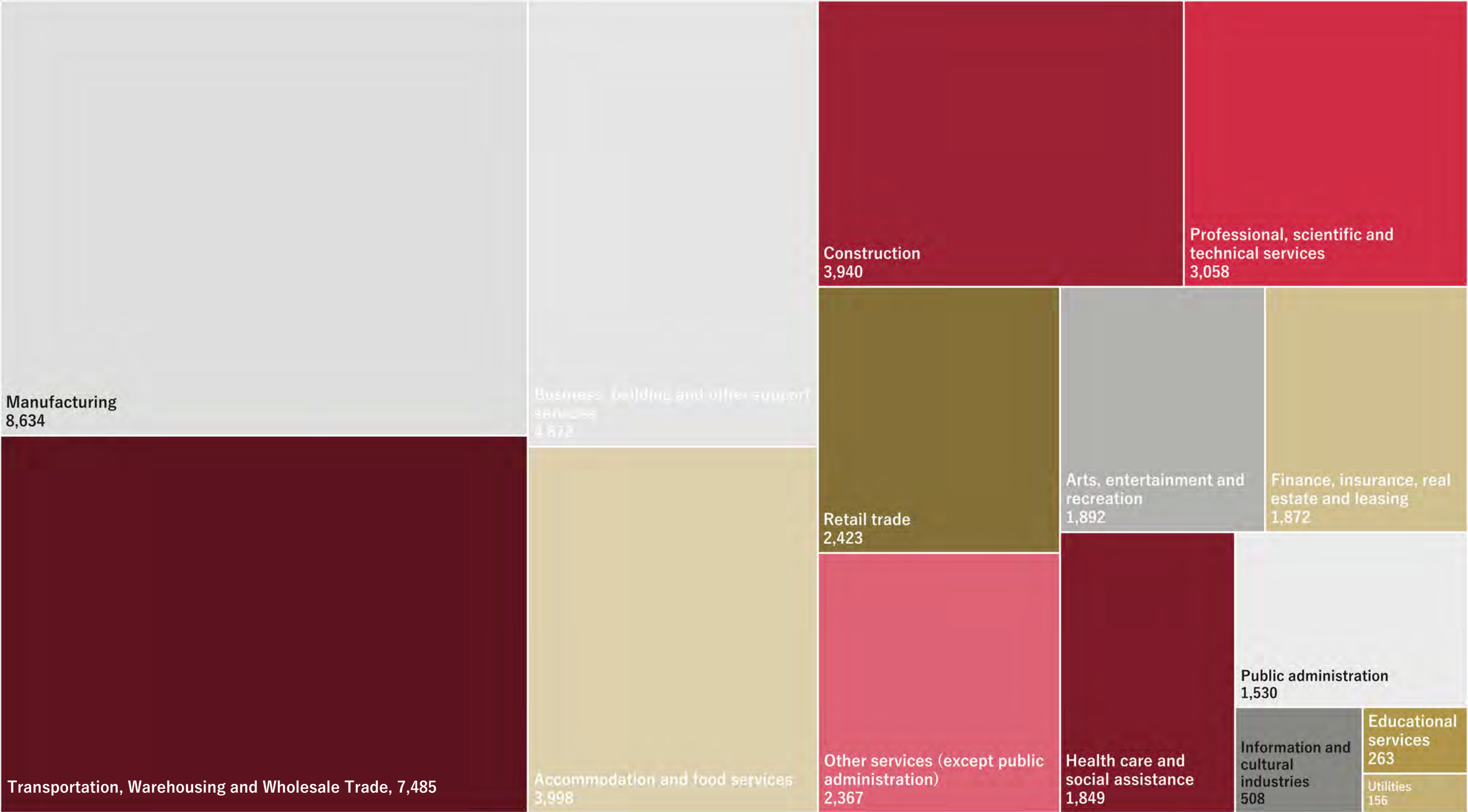
Total Employment & Establishments, 2001 - 2019



Source: Toronto Employment Survey, 2001 - 2019

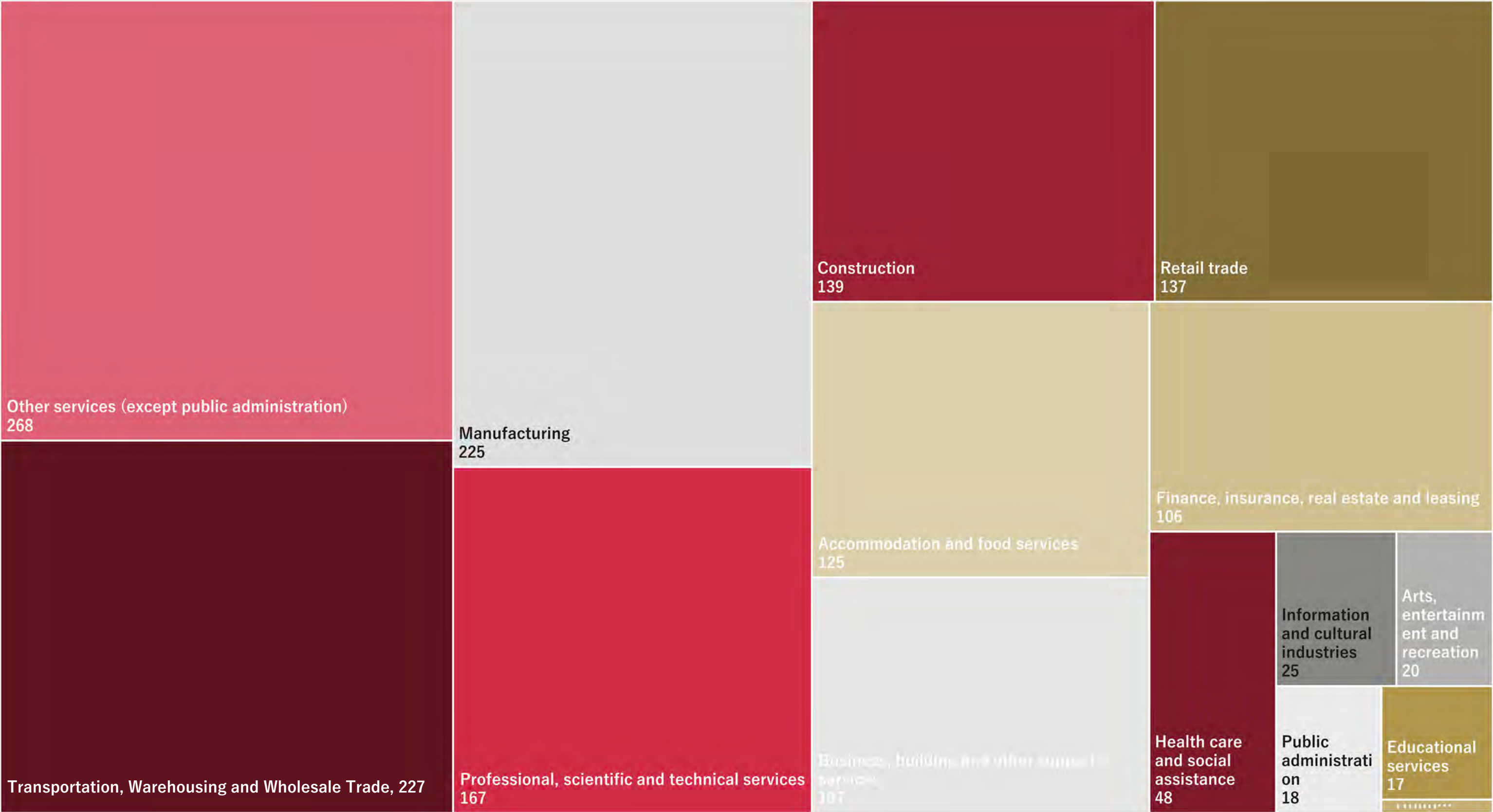


Total Employment by Industry (NAICS), 2019:



\*NAICS: "North American Industry Classification System, v 3.0 2017  
Source: Toronto Employment Survey, 2019

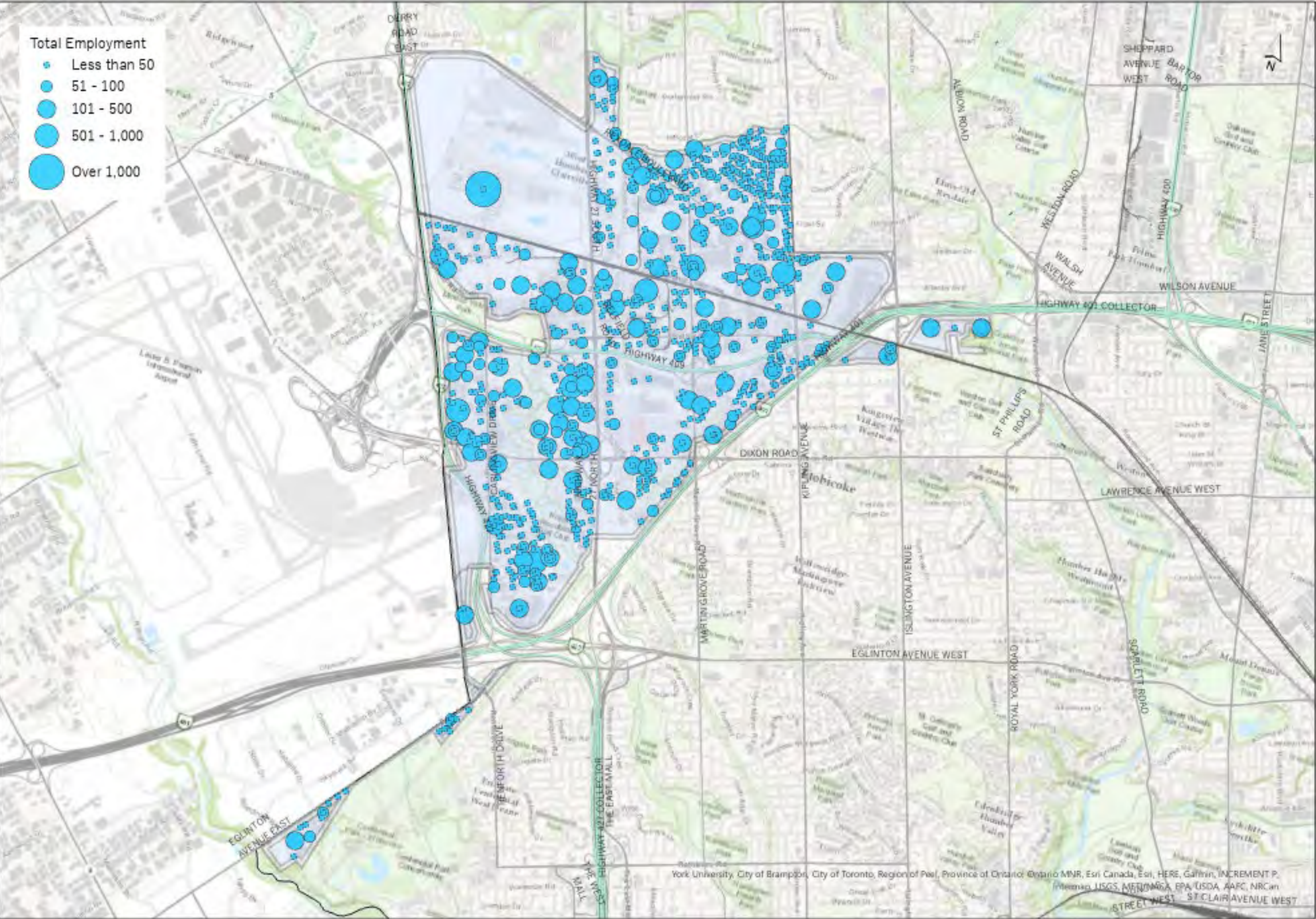
Total Establishments by Industry (NAICS), 2019



\*NAICS: “North American Industry Classification System, v 3.0 2017  
Source: Toronto Employment Survey, 2019



# Employment and Establishments in Rexdale - Airport Area of Employment



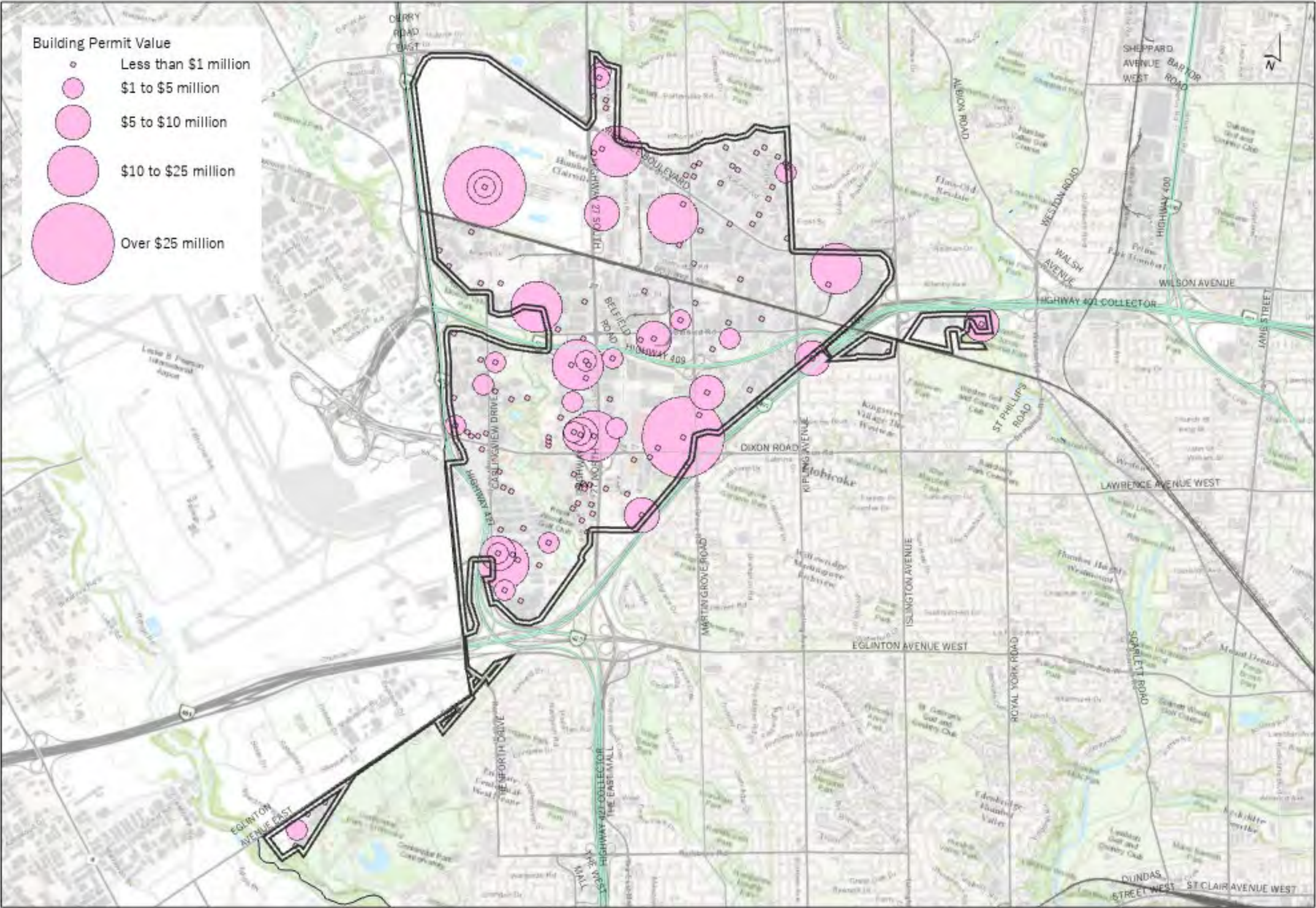
Total Employment by Size of Establishment, 2019

Source: City of Toronto Employment Survey





Value of Non-Residential Building Permits, 2016-2019 in in Rexdale - Airport Area of Employment



<b>Total Value of Non-Residential Building Permits, 2016-2019</b> (\$ millions): <b>\$ 688, 317</b>	
New Buildings	\$ 317,097
Interior Alterations	\$ 171,110
Additions	\$ 29,068
Multiple Projects	\$ 167,259
Demolition	\$ 3,784

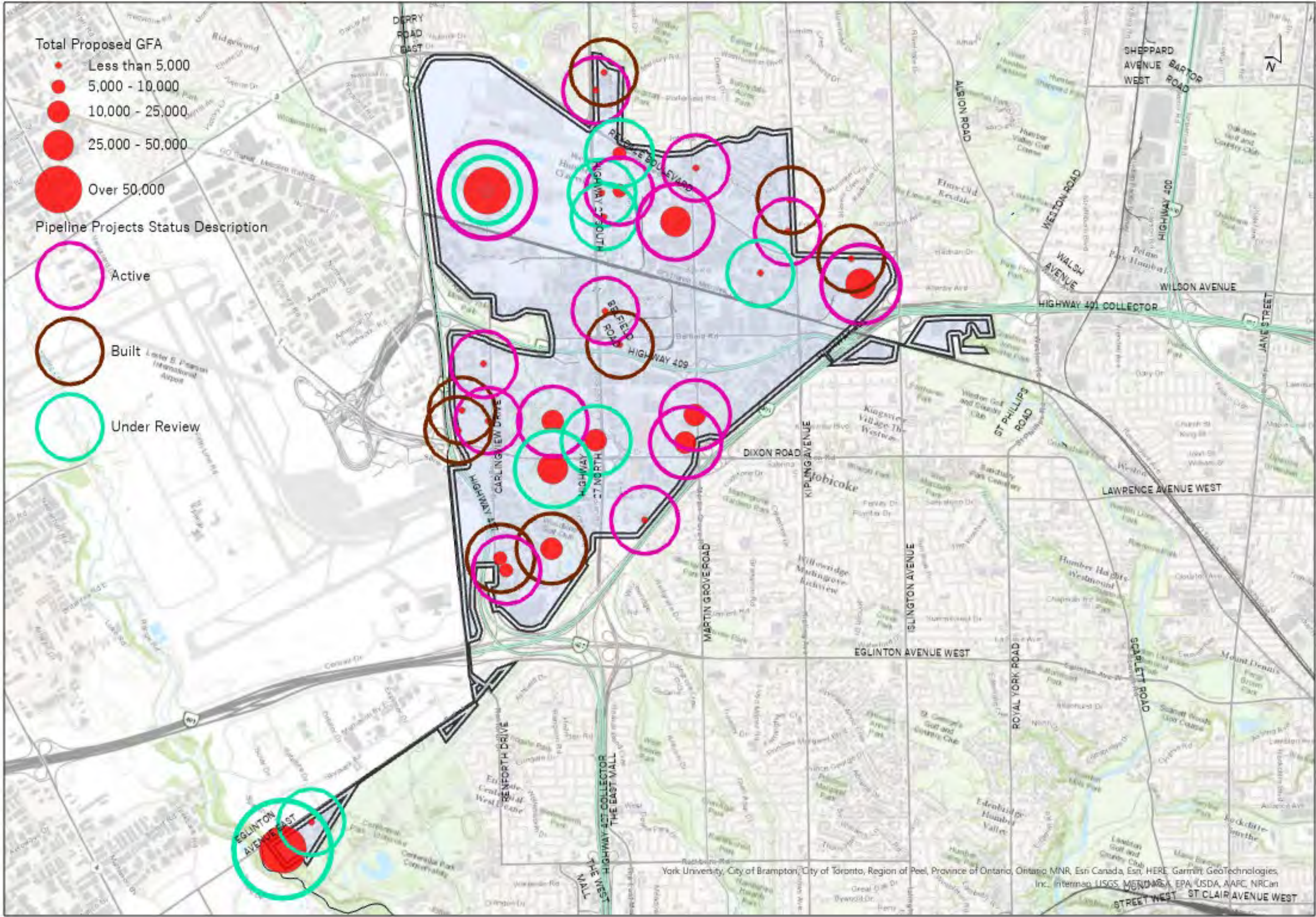
Value of Non-Residential Building Permits, 2016 – 2021

Source: City of Toronto, Building Permits





Non-Residential Development Proposals by Status, Q2-2021



Total Non-Residential GFA in Proposed Developments:

463,320 (Square Meters)

Active	254,370
Built	28,410
Under Review	180,540

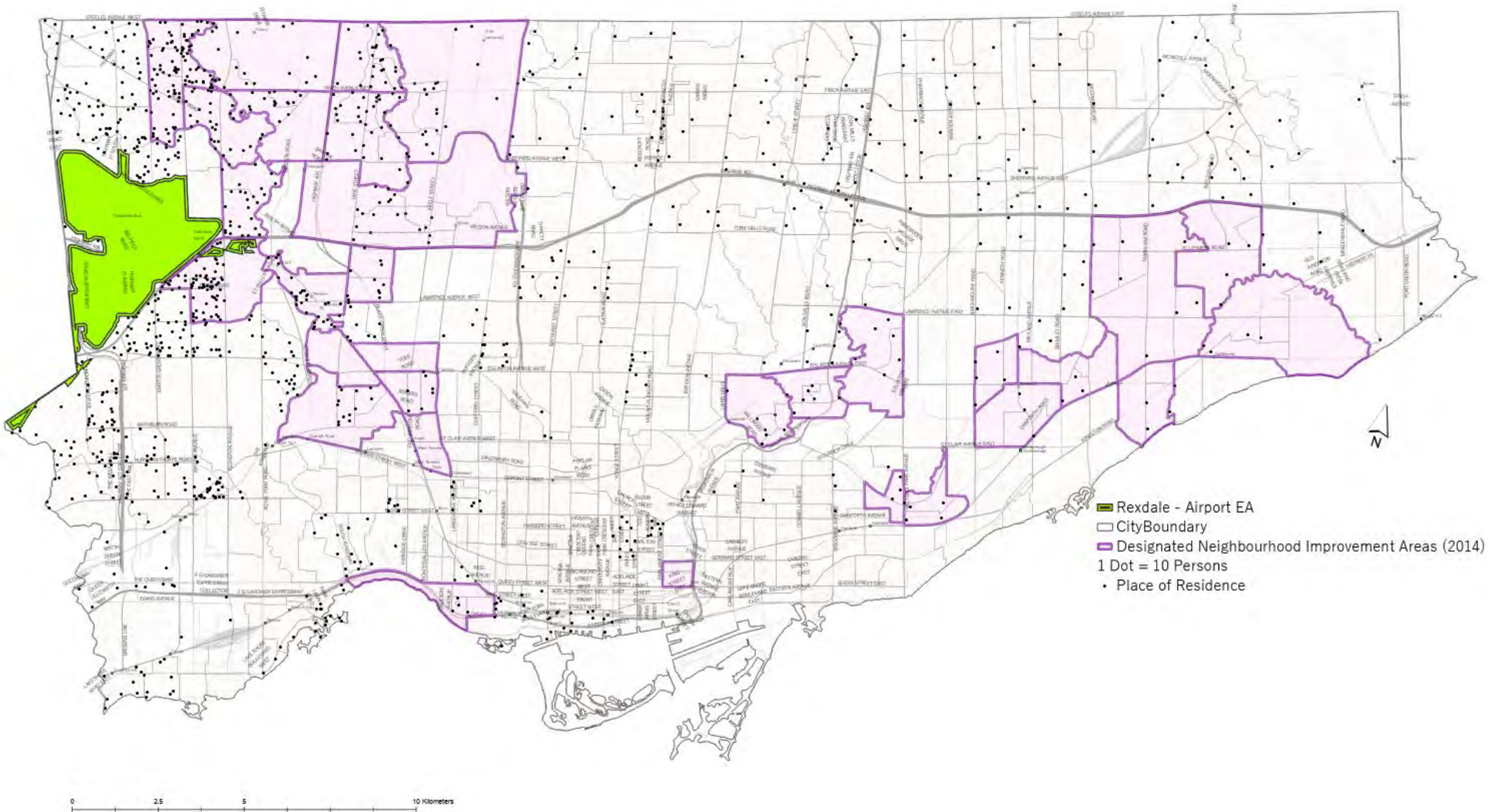
Non-Residential Development Proposals by Status

Source: City of Toronto Development Pipeline



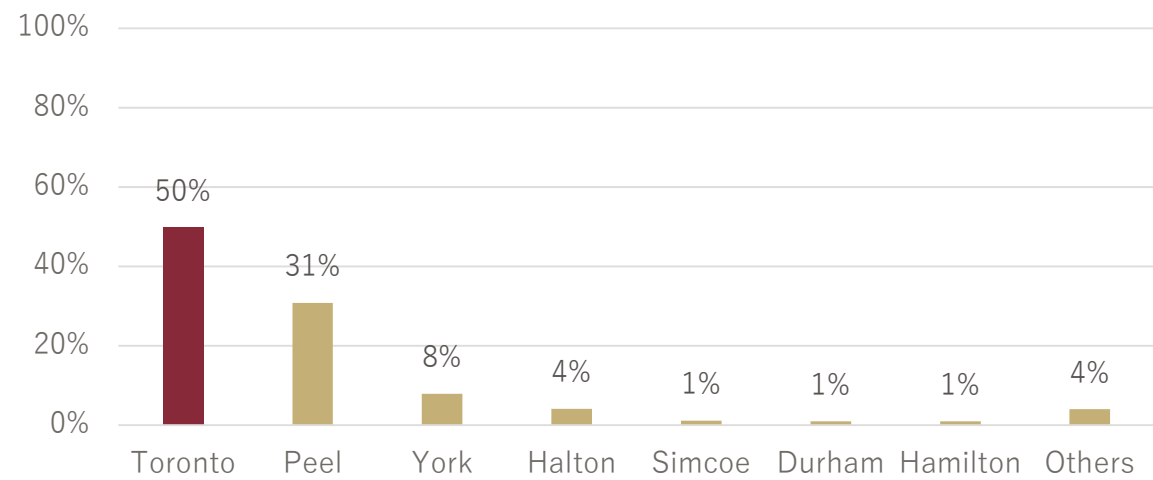


Place of Residence for Workers in Rexdale - Airport Area of Employment

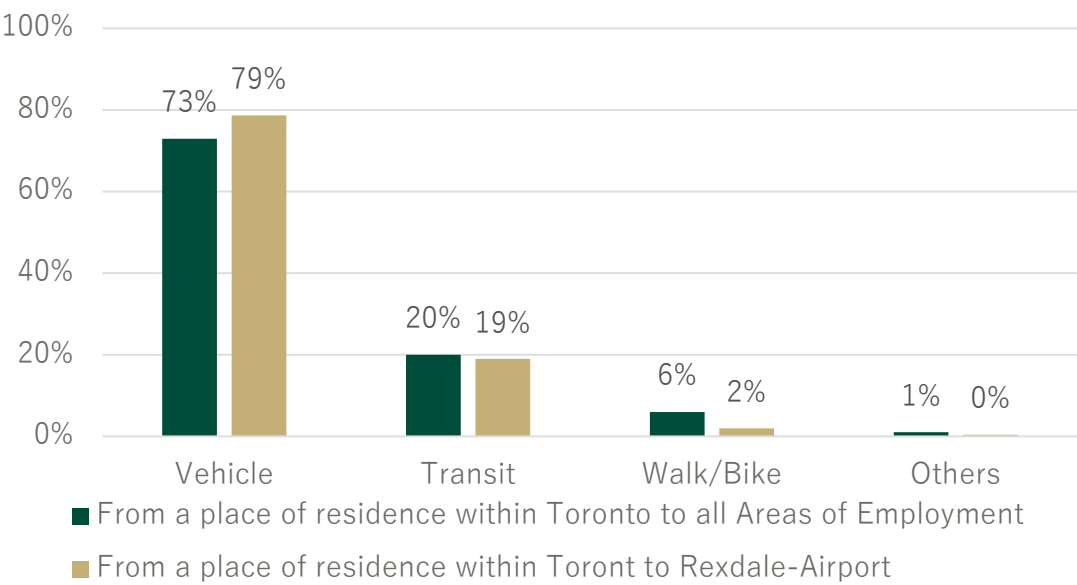


33% of the workforce share residing in Toronto live in Neighbourhood Improvement Areas.

Percent Distribution of Place of Residence



Mode of Transport of Commuters from within Toronto to all the Areas of Employment compared to Rexdale-Airport



Source: Statistics Canada, Place of Work Status- 2016 Census





## **Profile 3**

**Junction – Weston – Dupont Area of Employment**



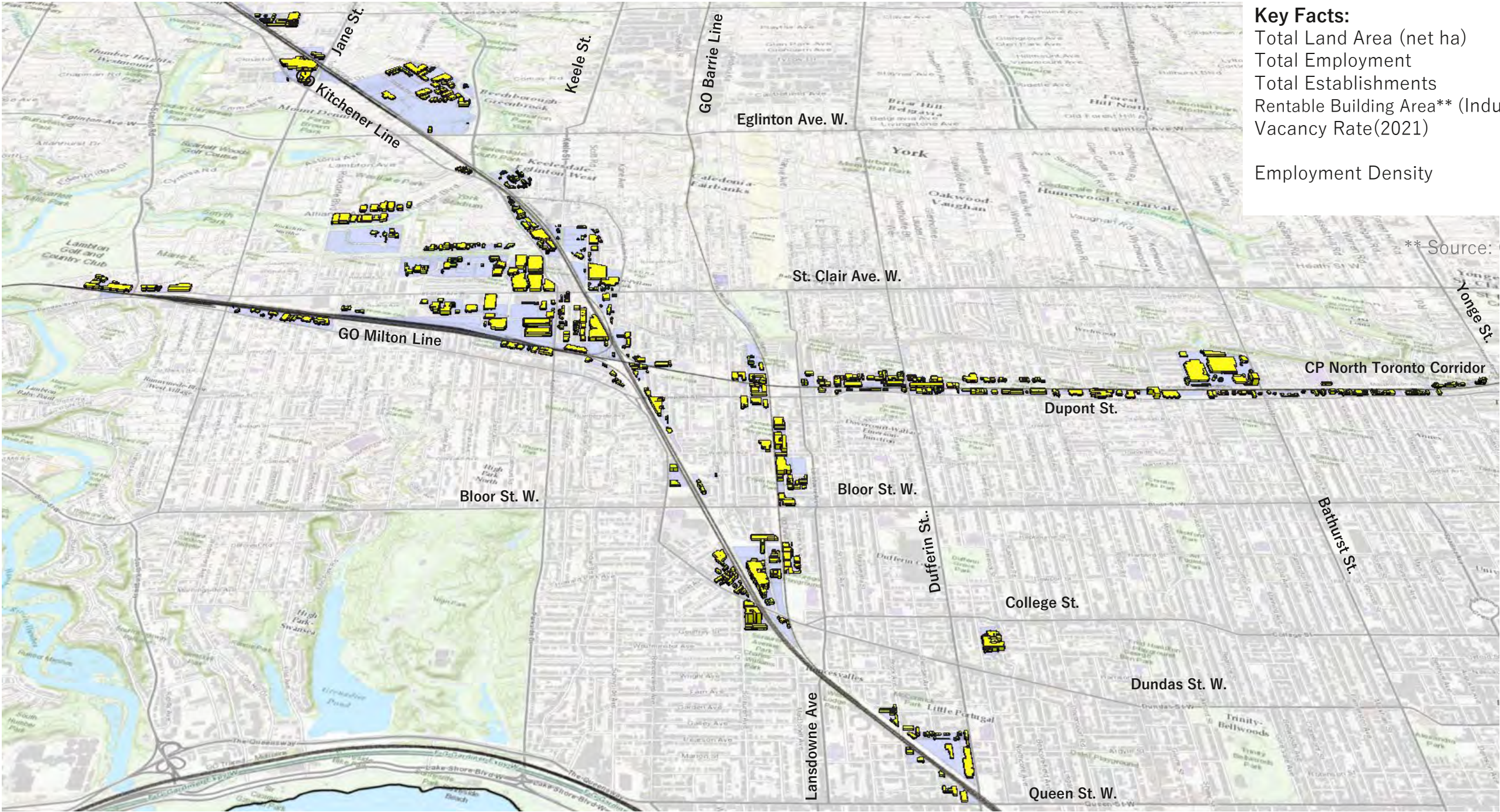
# Junction-Weston-Dupont Area of Employment

## Area Context:

The Junction-Weston-Dupont area of employment comprises employment lands originally developed along, or in the vicinity of, the 19th century rail corridors in the west end of Toronto. With close to 22,000 jobs in these areas, earlier losses in 2006 have been overcome and jobs in the area continue to grow. About 82% of these workers live within Toronto and 24% of those reside in Neighbourhood Improvement Areas.



Key Map



Key Facts:	
Total Land Area (net ha)	197.1 ha
Total Employment	21,759
Total Establishments	1,266
Rentable Building Area** (Industrial)	7.54 million sq. ft.
Vacancy Rate(2021)	1.1%
Employment Density	110.4 jobs per net ha

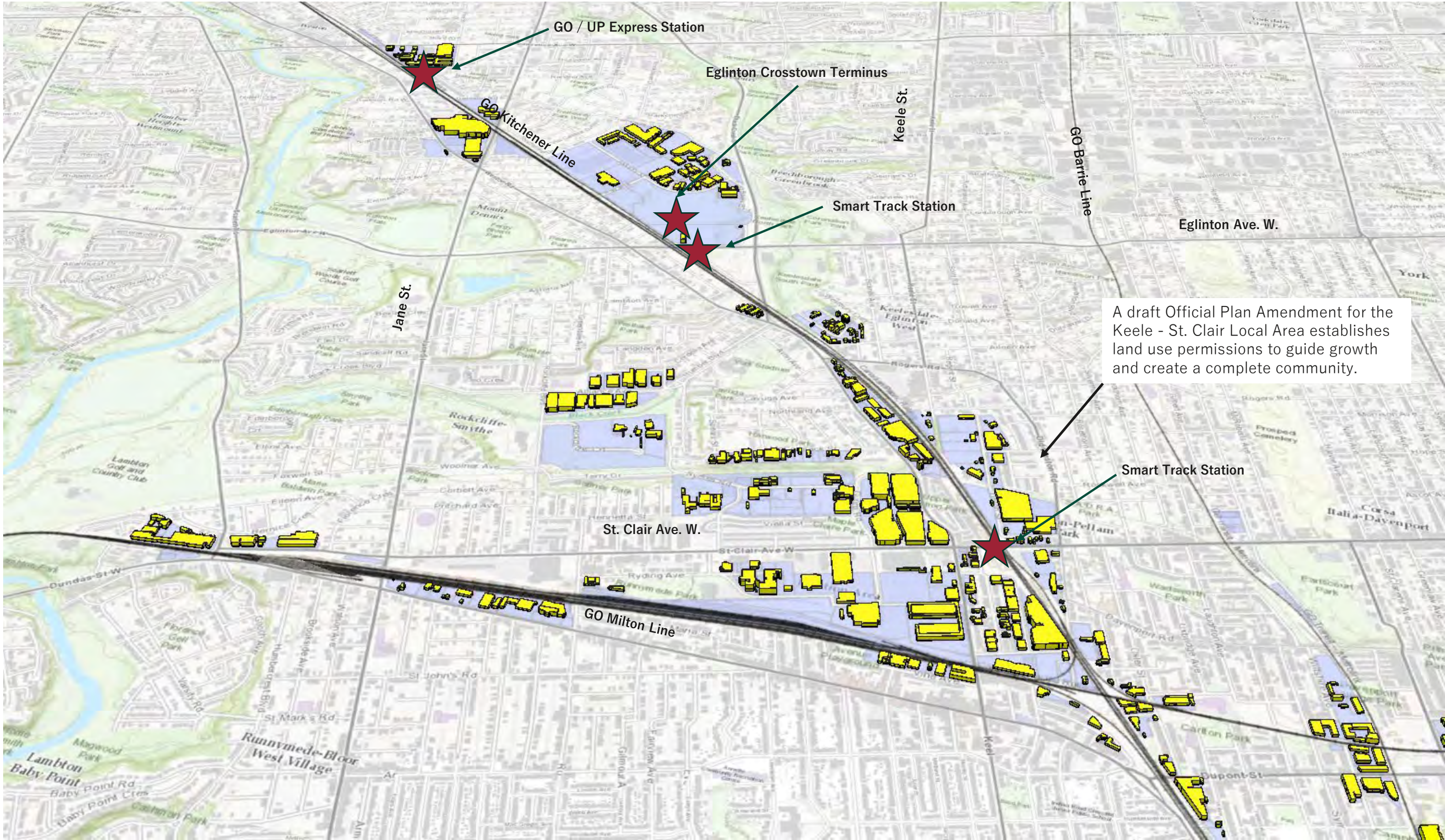
\*\* Source: CoStar Group, [www.costar.com](http://www.costar.com)

Source: City of Toronto 3D Massing





Junction-Weston-Dupont Area North





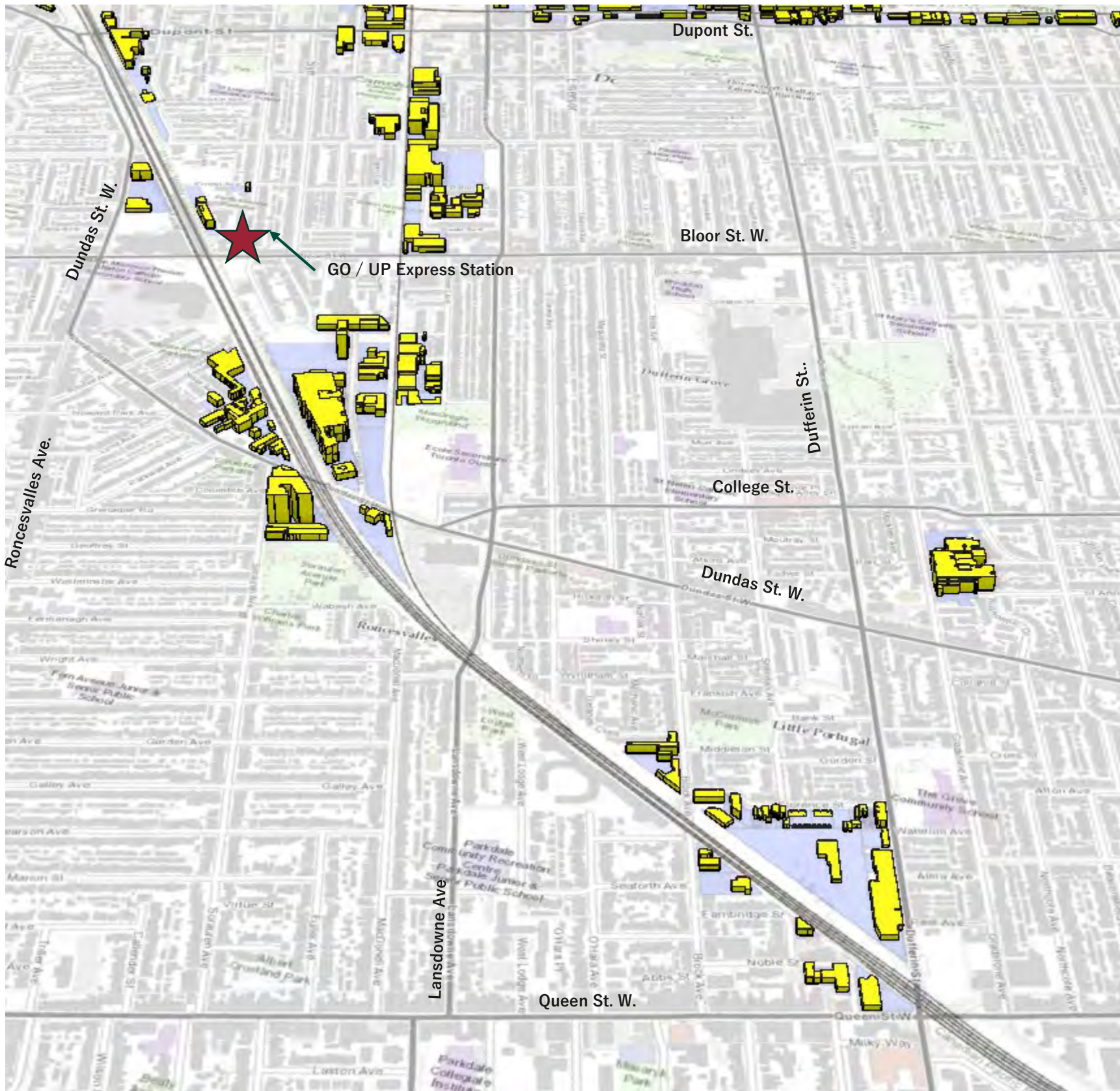
# Junction-Weston-Dupont Area South

## Function & Focus

- The focus here features long-established uses including meat packing, a range of manufacturing establishments, and business services.
- With close to 22,000 jobs in a broad spectrum of employment land uses, earlier losses from 2001 to 2006 have been overcome with an increase of 39% since 2011.
  - 31% of all jobs are in Transportation, Warehousing and Wholesale Trade;
  - 16% of all jobs are in Manufacturing, a significant recovery; and
  - 13% of all jobs are in Professional, Scientific & Technical Services.
- Combined, employment lands here total over 197 ha with 7.5 million sq. ft. of industrial inventory with a vacancy rate of 1.1%
- Employment density is over 110 jobs per ha net.
- The past five years has seen \$510 million invested in new industrial buildings and alterations, a significant increase from the 2006– 2010 period.
- Currently, 436,000 square metres of non-residential floor space is in development.
- 82% (17,800) of all workers in the Junction-Weston-Dupont area live within the City of Toronto, with 24% of those residing in Neighbourhood Improvement Areas.
- For those 17,800 Toronto residents, 11% commute on foot or bicycle while 18% use transit.

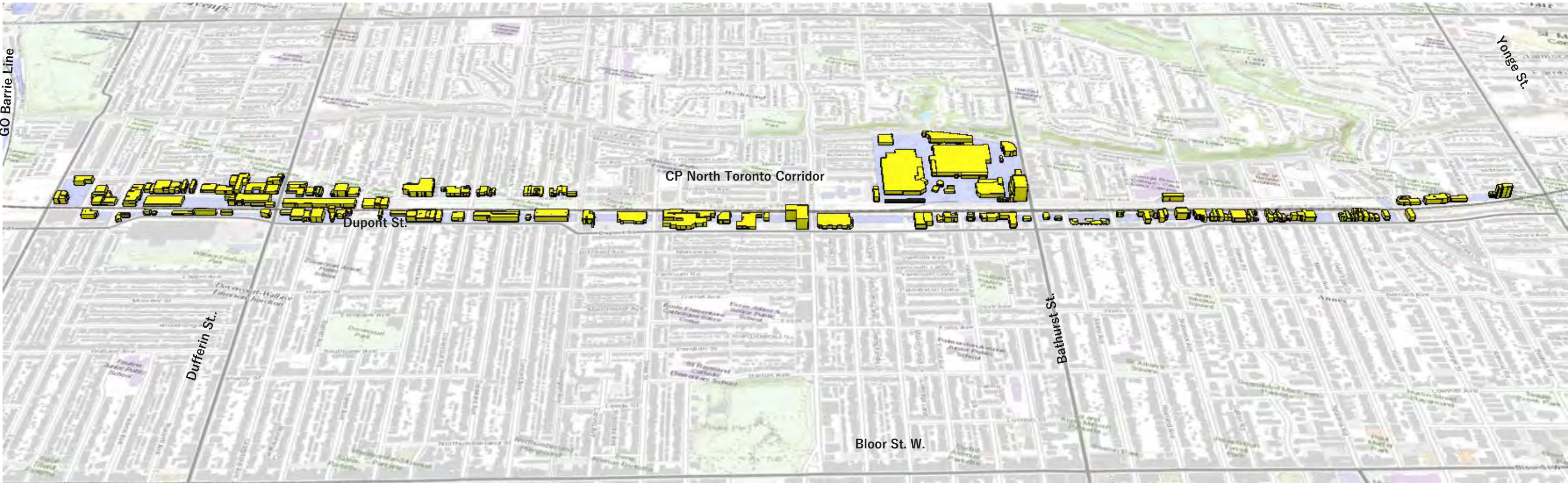
### Top Employers:

- Toronto Transit Commission (2 locations)
- Maple Leaf Poultry
- Ubisoft
- Nestle Canada
- Toronto District School Board





# Junction-Weston-Dupont Area East

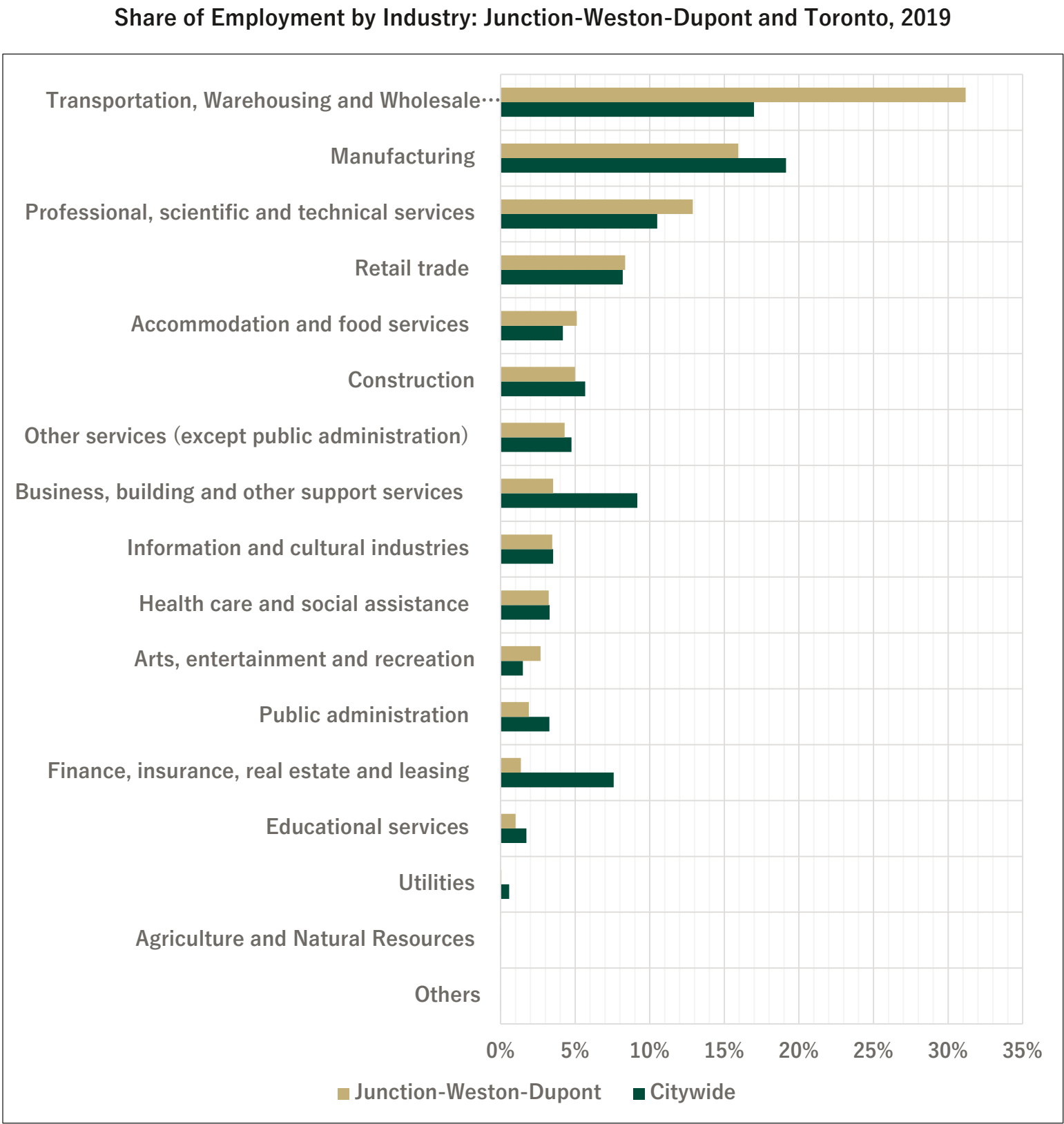


## Outlook

- The area appeals to a range of users at various scales, attracted to the unique mix of building types; there is also a significant presence of commercial activity in some areas.
- Significant transit and road improvements are planned throughout the Keele-St. Clair area including the construction of the Smart Track Station.
- Transit improvements will increase accessibility for workers.



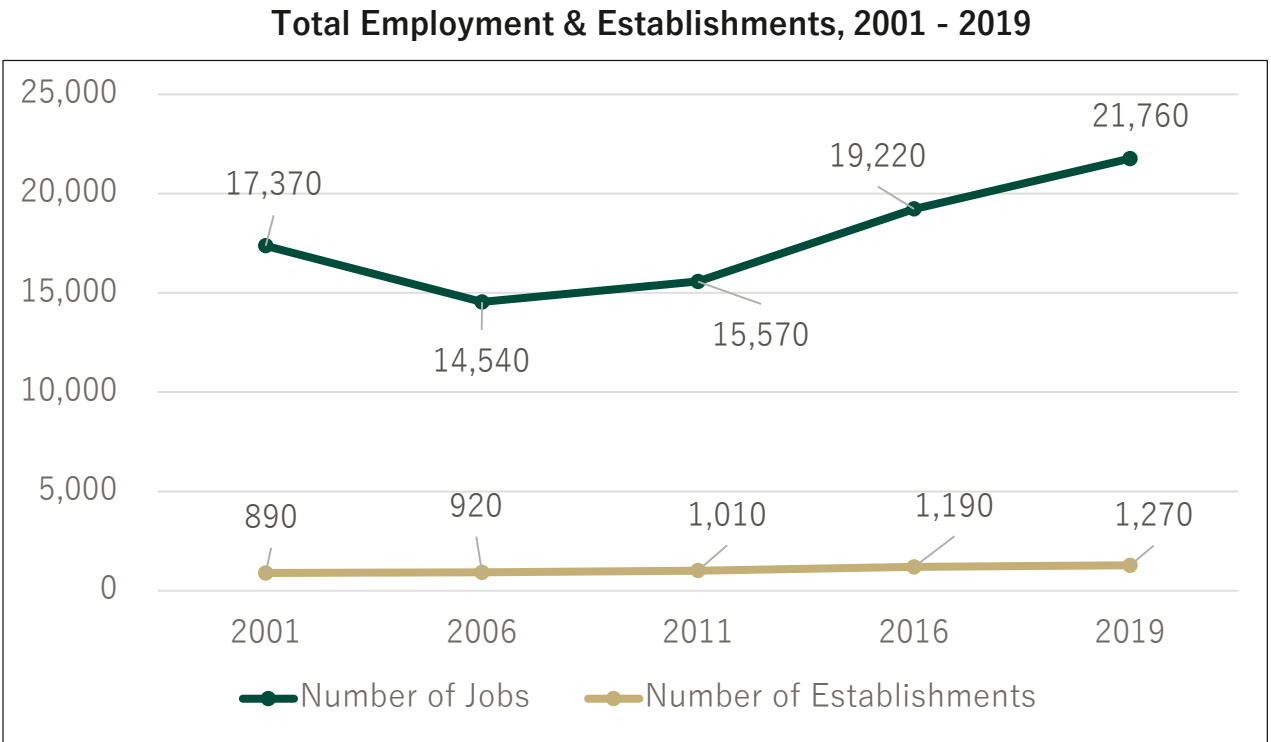
Share of Employment by Industry: Junction-Weston-Dupont and Toronto, 2019



Source: City of Toronto Employment Survey, 2019

NAICS Categories	Number of Jobs
Transportation, Warehousing and Wholesale Trade	6,780
Manufacturing	3,470
Professional, scientific and technical services	2,810
Retail trade	1,820
Accommodation and food services	1,110
Construction	1,090
Other services (except public administration)	930
Business, building and other support services	770
Information and cultural industries	750
Health care and social assistance	700
Arts, entertainment and recreation	580
Public administration	410
Finance, insurance, real estate and leasing	300
Educational services	220
Utilities	10
Agriculture and Natural Resources	10
Others	0
Total	21,760

Source: City of Toronto Employment Survey, 2019



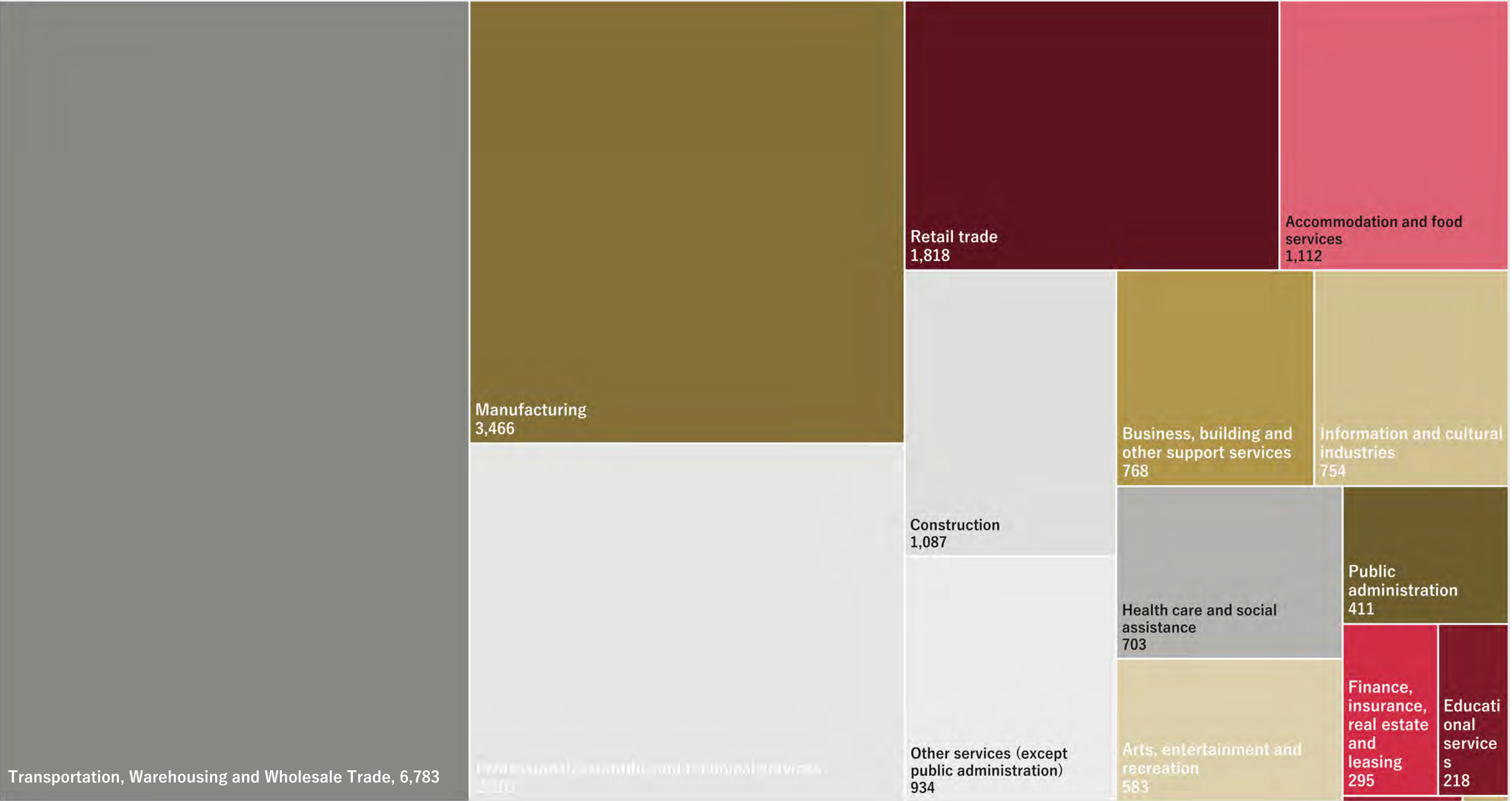
Source: City of Toronto Employment Survey, 2001-2019

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Total Employment by Industry (NAICS), 2019:



\*NAICS: "North American Industry Classification System, v 3.0 2017  
Source: Toronto Employment Survey, 2019



Total Establishments by Industry (NAICS), 2019



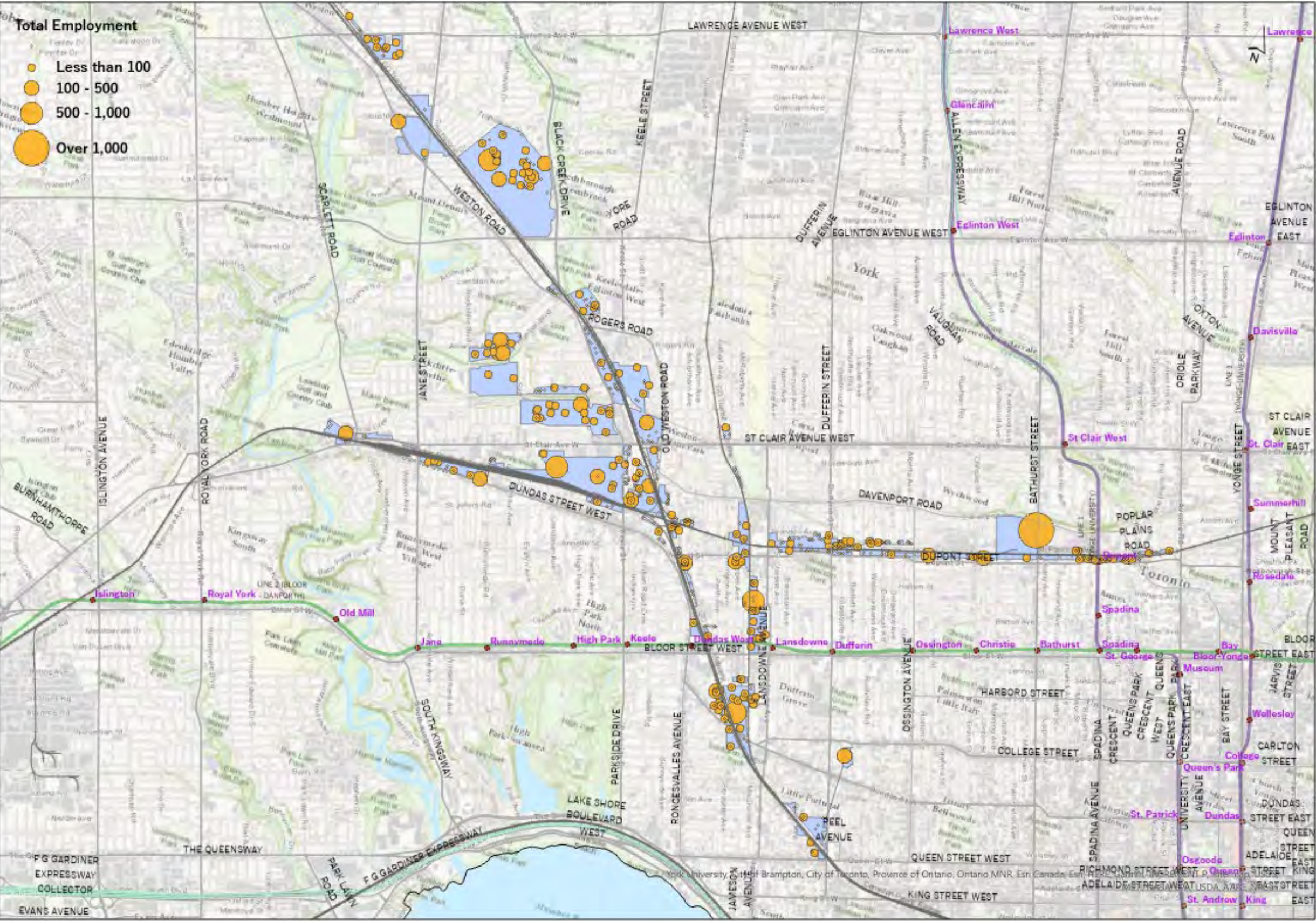
\*NAICS: "North American Industry Classification System, v 3.0 2017

Source: Toronto Employment Survey, 2019





# Employment and Establishments in Junction-Weston-Dupont Area



Total Employment by Size of Establishment, 2019

Source: City of Toronto Employment Survey



Value of Non-Residential Building Permits, 2016-2019 in Junction-Weston-Dupont Area



Total Non-Residential Investment (\$000s): \$510,396

New Building: \$389,290  
Interior Alterations: \$100,537  
Additions: \$6,240  
Multiple Projects: \$14,279  
Demolition: \$50

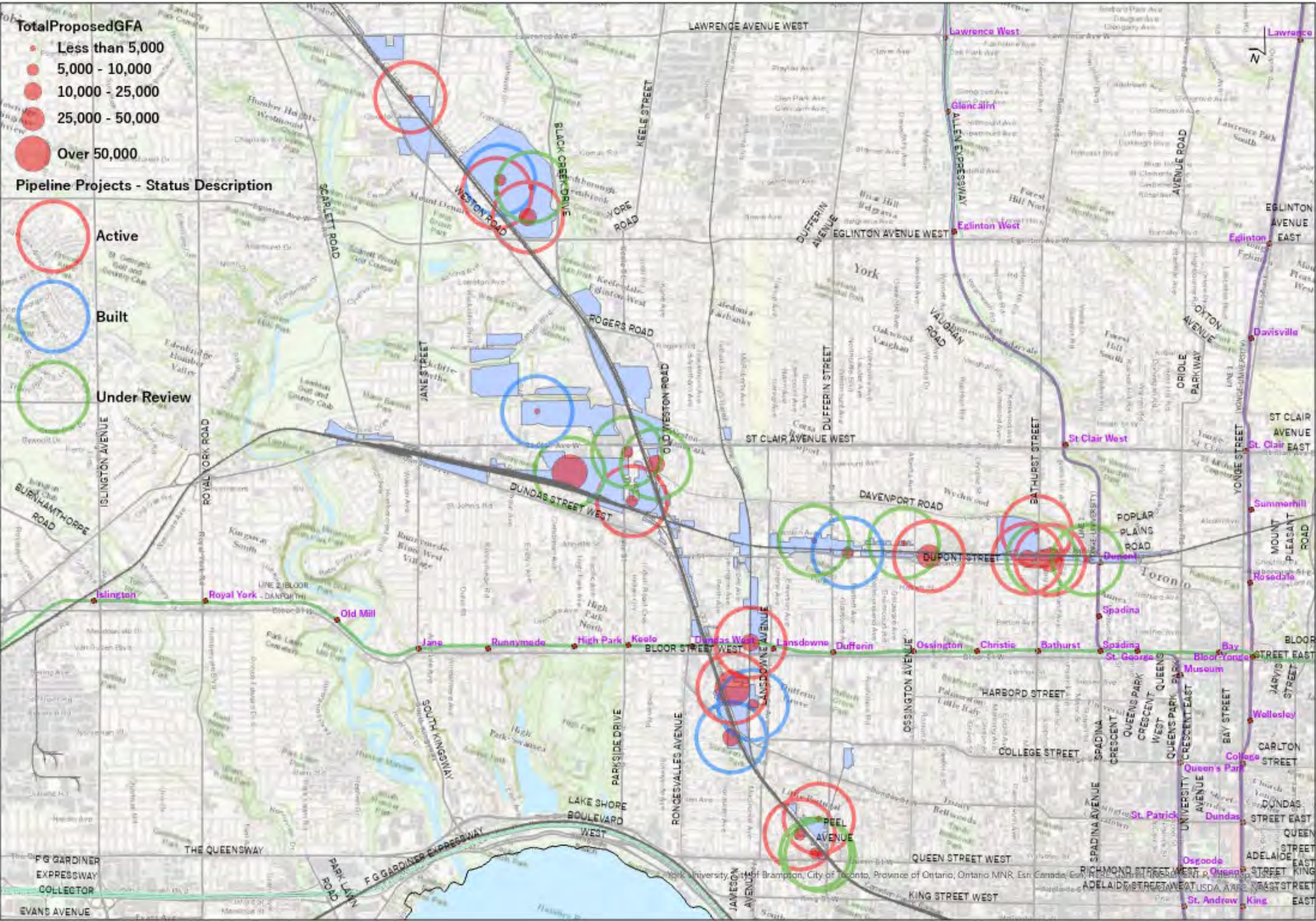
Value of Non-Residential Building Permits, 2016 – 2021

Source: City of Toronto, Building Permits





# Non-Residential Development Proposals by Status, Q2-2021



Total Non-Res GFA in Proposed Developments:	495,640 sq.m.
Active:	232,350
Under Review:	204,110
Built	59,180

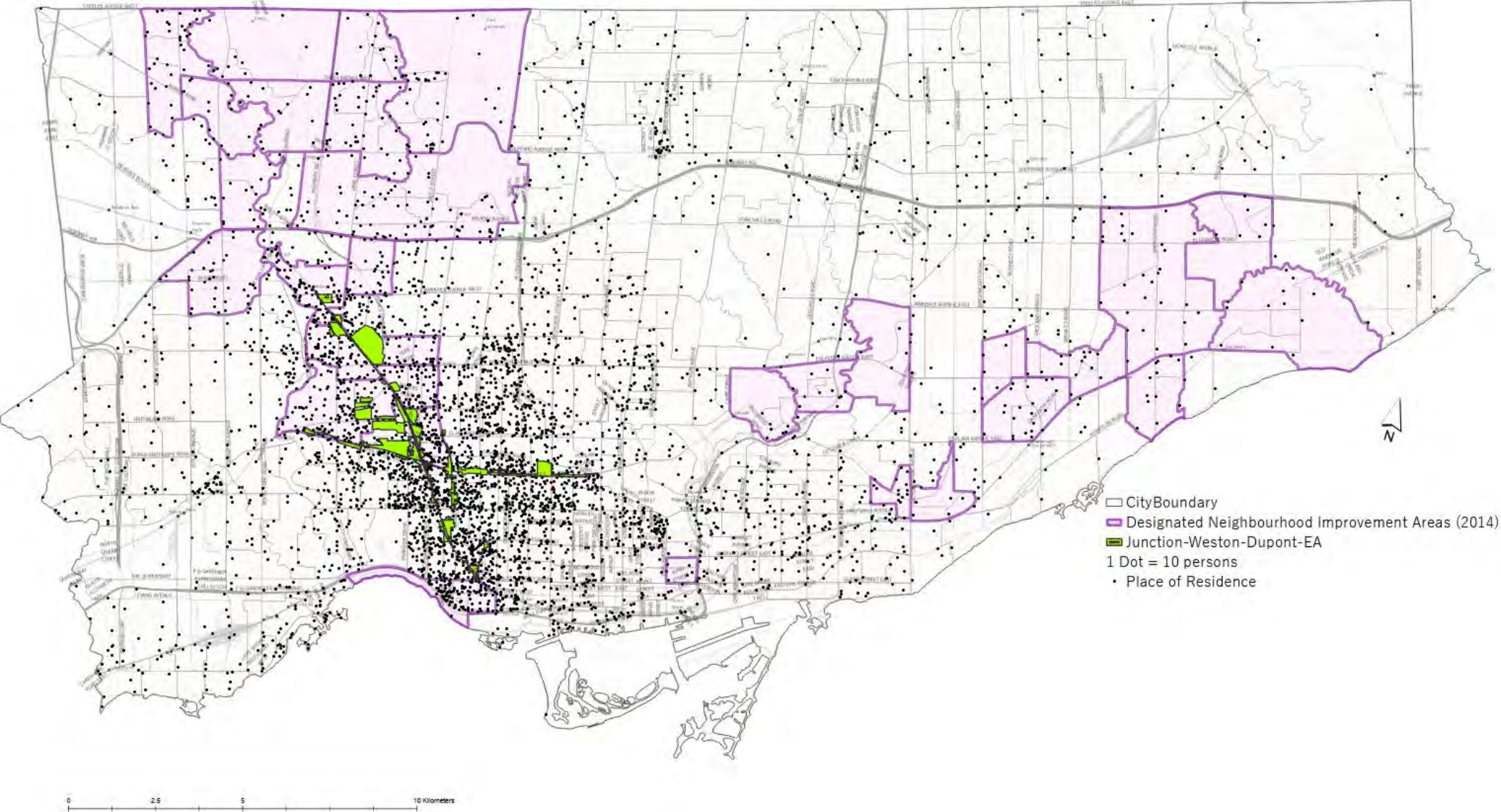
Non-Residential Development Proposals by Status

Source: City of Toronto Development Pipeline



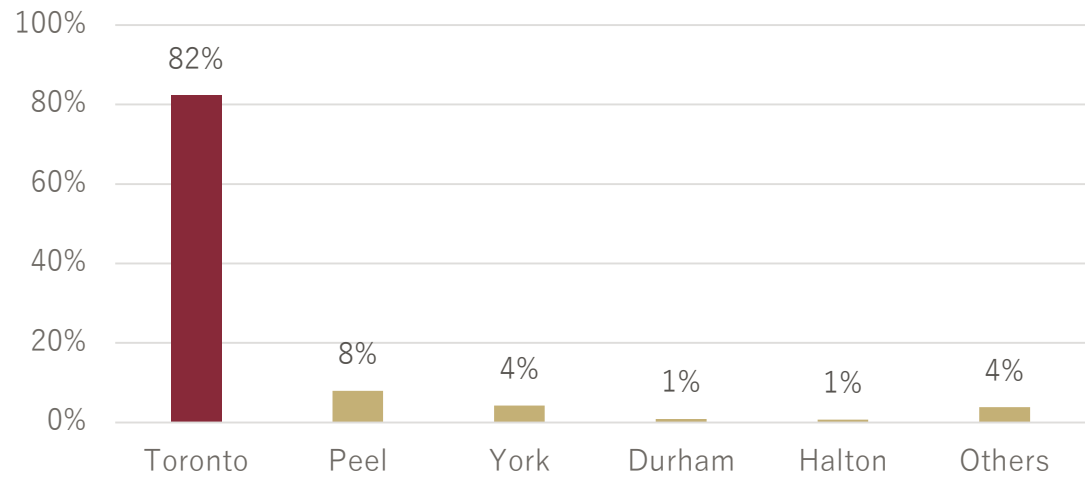


# Place of Residence for Workers in Junction-Weston-Dupont Area

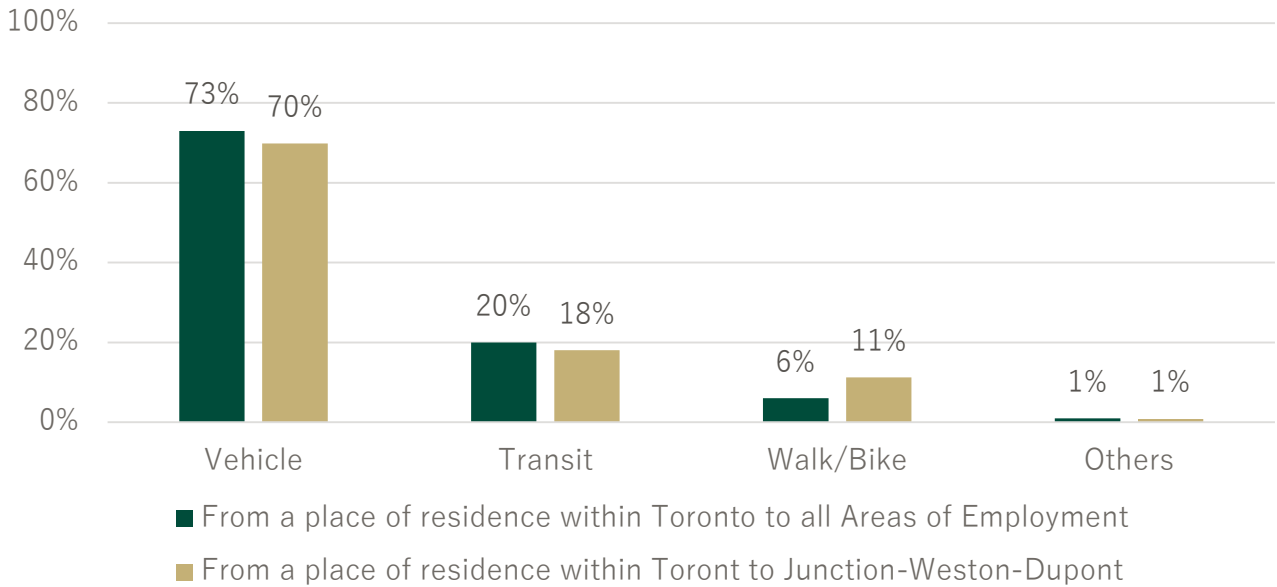


24% of the workforce share residing in Toronto live in Neighbourhood Improvement Areas.

Percent Distribution of Place of Residence



Mode of Transport of Commuters from Within Toronto to All Areas of Employment Compared to Junction-Weston-Dupont



Source: Statistics Canada, Place of Work Status- 2016 Census





## Profile 4

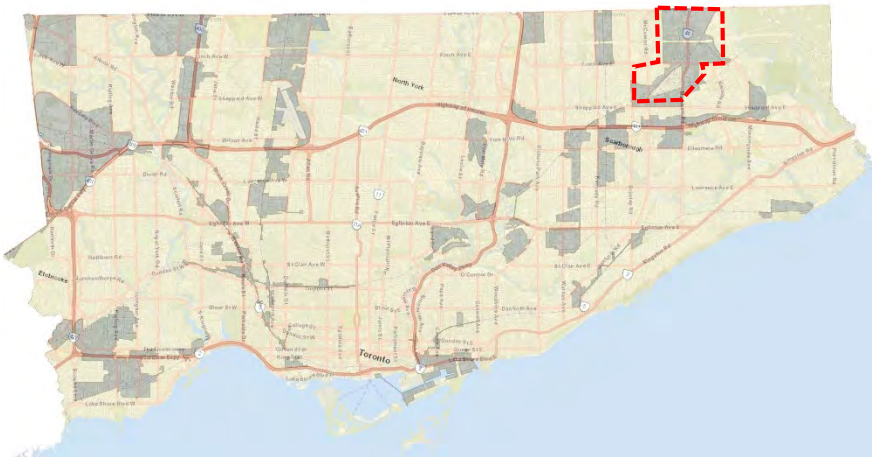
### Tapscott Area of Employment



# Tapscott Area of Employment

## Area Context:

Tapscott, located in the north-east area of Toronto, is the city’s third largest area geographically, with 666 ha of employment land. The Tapscott area of employment is a home to 13% of all Toronto Manufacturing jobs, Tapscott is also a favoured location for Transportation, Warehousing and Wholesale trade. Some of the last vacant lands in the city have been developed for employment purposes in recent years.



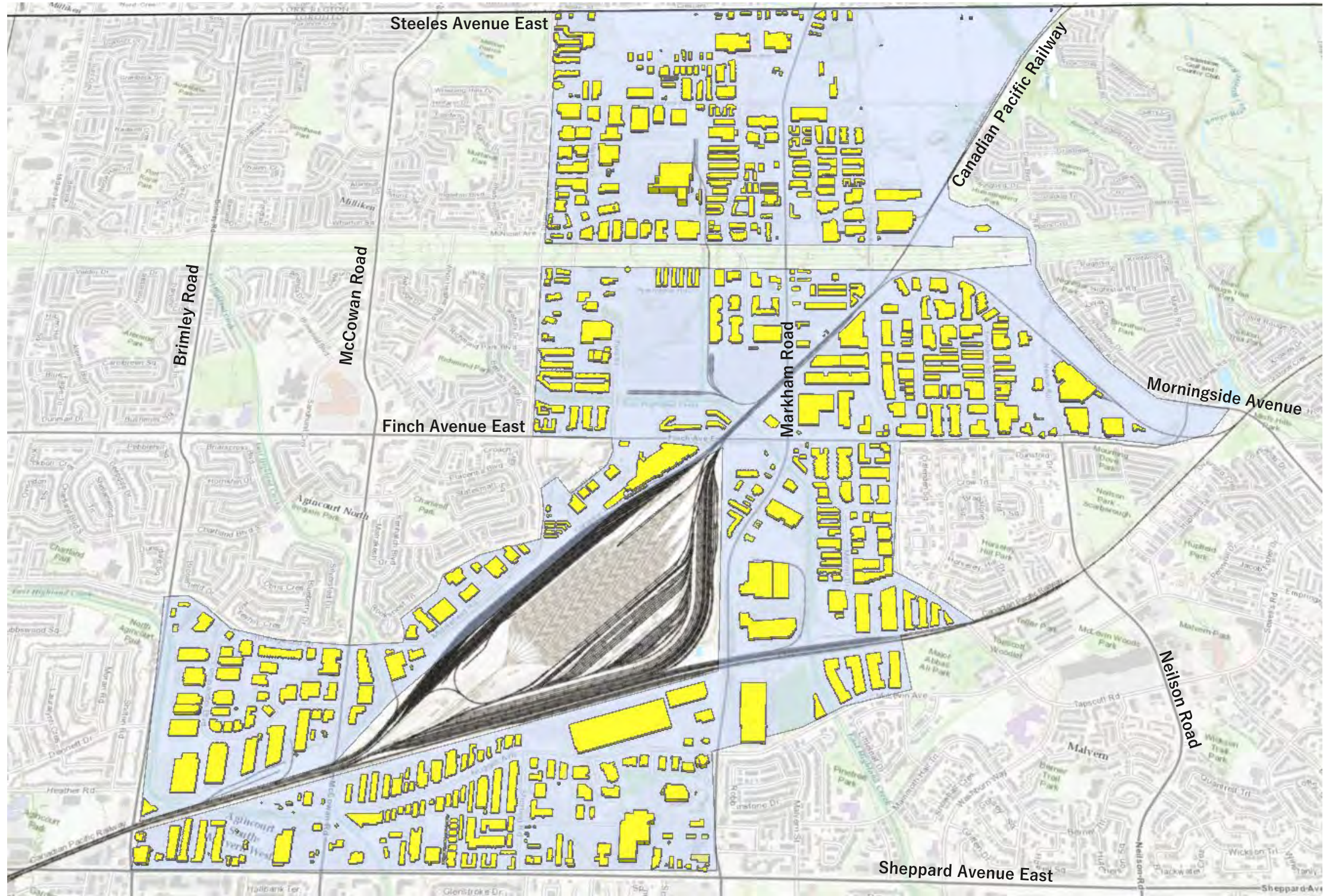
Key Map

## Key Facts:

Total Land Area (Net Ha)	666.4 ha
Total Employment	32,894
Total Establishments	2,268
Rentable Building Area**(Industrial)	22.4 million sq. ft.
Vacancy Rate(2021)	3.5 %
Employment Density (Net jobs/ha)	49.2
** Source: CoStar Group, <a href="http://www.costar.com">www.costar.com</a>	

## Top Employers:

- Black & McDonald Ltd.
- Toronto Transit Commission
- Toronto District School Board
- Estee Lauder Cosmetics Ltd.
- Canada Goose

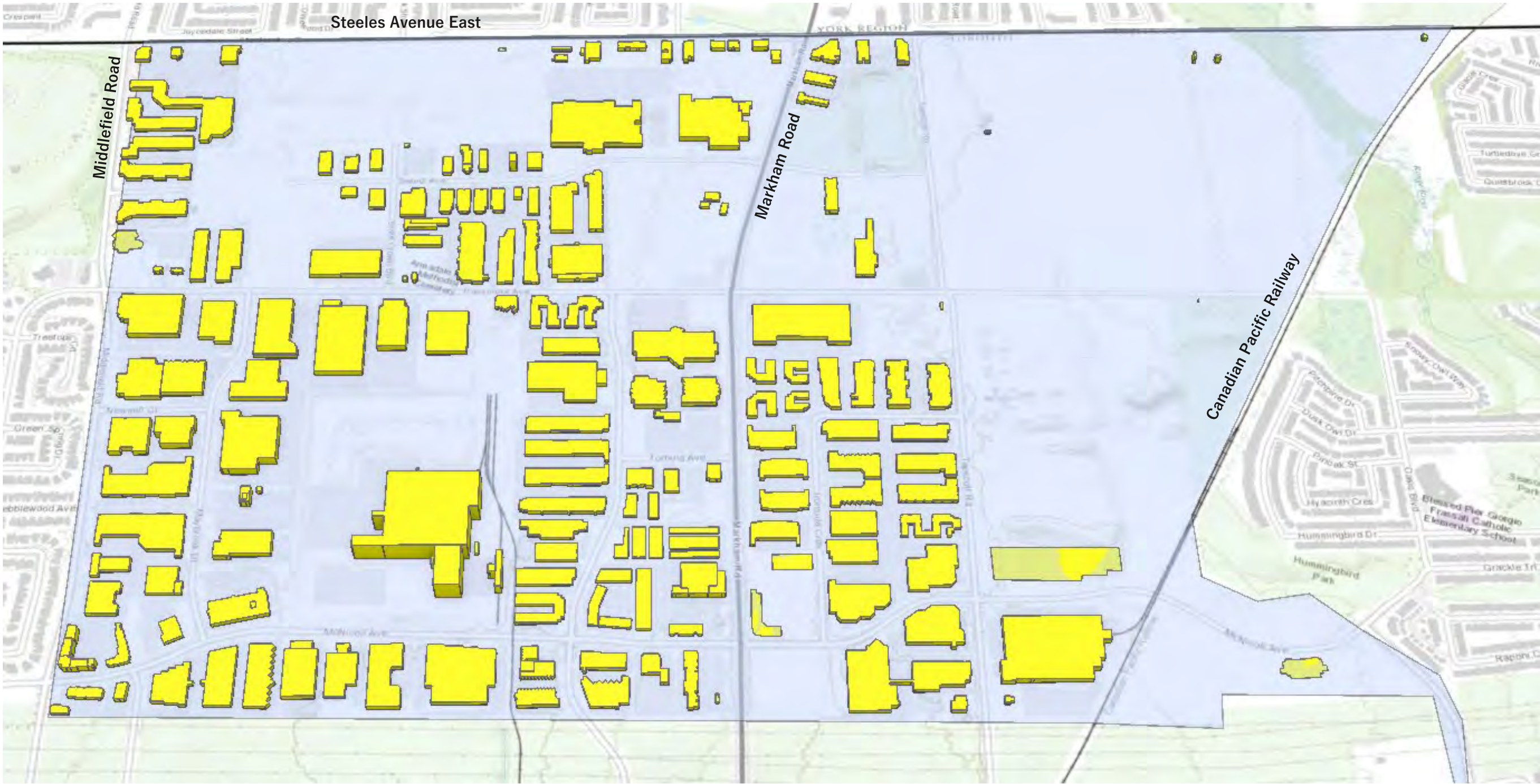


Source: City of Toronto 3D Massing





# Tapscott Area North



## Function & Focus

- Tapscott area of employment is among the city’s most dynamic employment areas, with almost 33,000 jobs primarily in Manufacturing (31%) and Transportation / Warehousing (22%).
- Tapscott is home to 13% of all manufacturing jobs in the city.
- The loss in jobs from 2006 to 2016 has been more than made up for with a gain of almost 3,600 jobs since 2016.
- A variety of firms, including local-serving businesses in 22.4 million sq. ft. of industrial space, with a current vacancy rate of around 3.5%.
- Over \$500 million has been invested in new buildings (\$450 million) and alterations over the past five years.





# Tapscott Area East

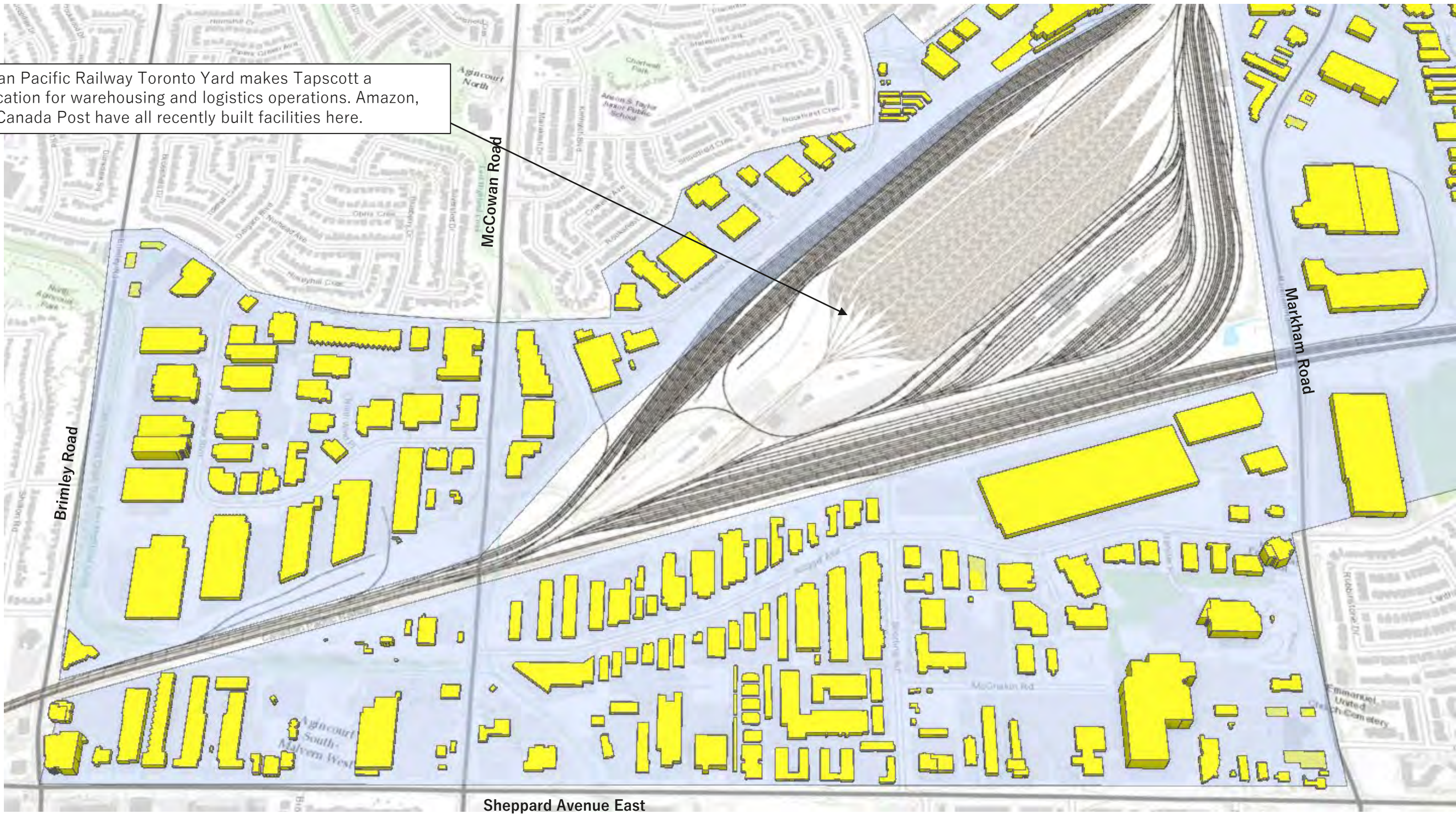


- There is 307,000 square metres of new development on the horizon.
- Recent large-scale new supply activity, including warehousing / distribution businesses (Amazon, Canada Post and FedEx) has reduced the city's supply of vacant employment land.
- With over 666 ha of land designated for employment, the current employment density is 49.2 jobs per ha.
- 59% of Tapscott workers reside within the City of Toronto and 22% of those live in Neighbourhood Improvement Areas.
- The 19,500 workers who live in Toronto predominantly travel to work by private vehicle (81%), while 19% chose a low-carbon mode of travel as 17% made their work trips by transit while 2% walked.



# Tapscott Area South

The Canadian Pacific Railway Toronto Yard makes Tapscott a favoured location for warehousing and logistics operations. Amazon, FedEx and Canada Post have all recently built facilities here.

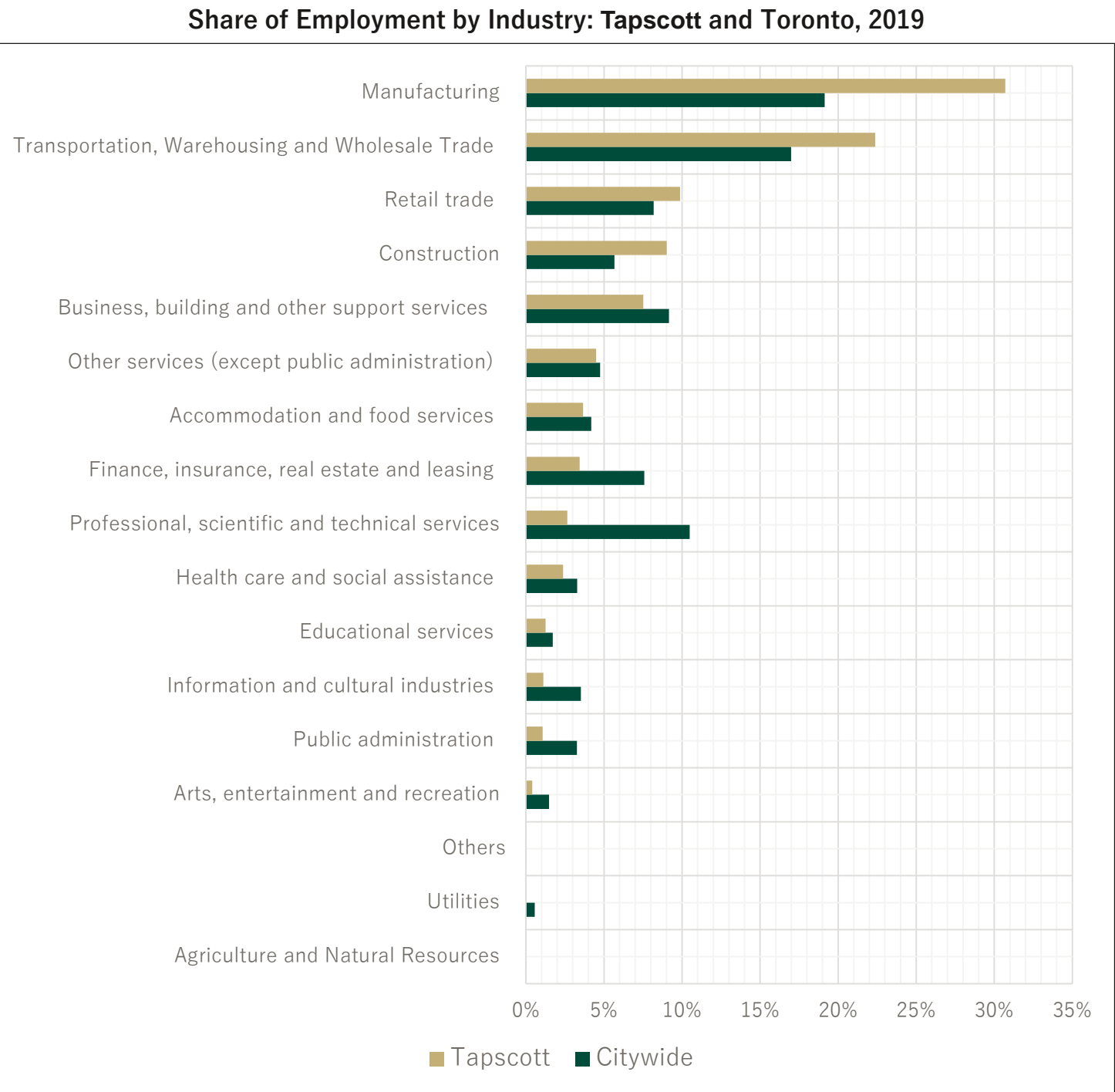


## Outlook

- Tapscott will continue to appeal to a range of users, including manufacturers and warehousing / distribution uses.
- There is some conversion pressure located on Sheppard Avenue East at the south end.



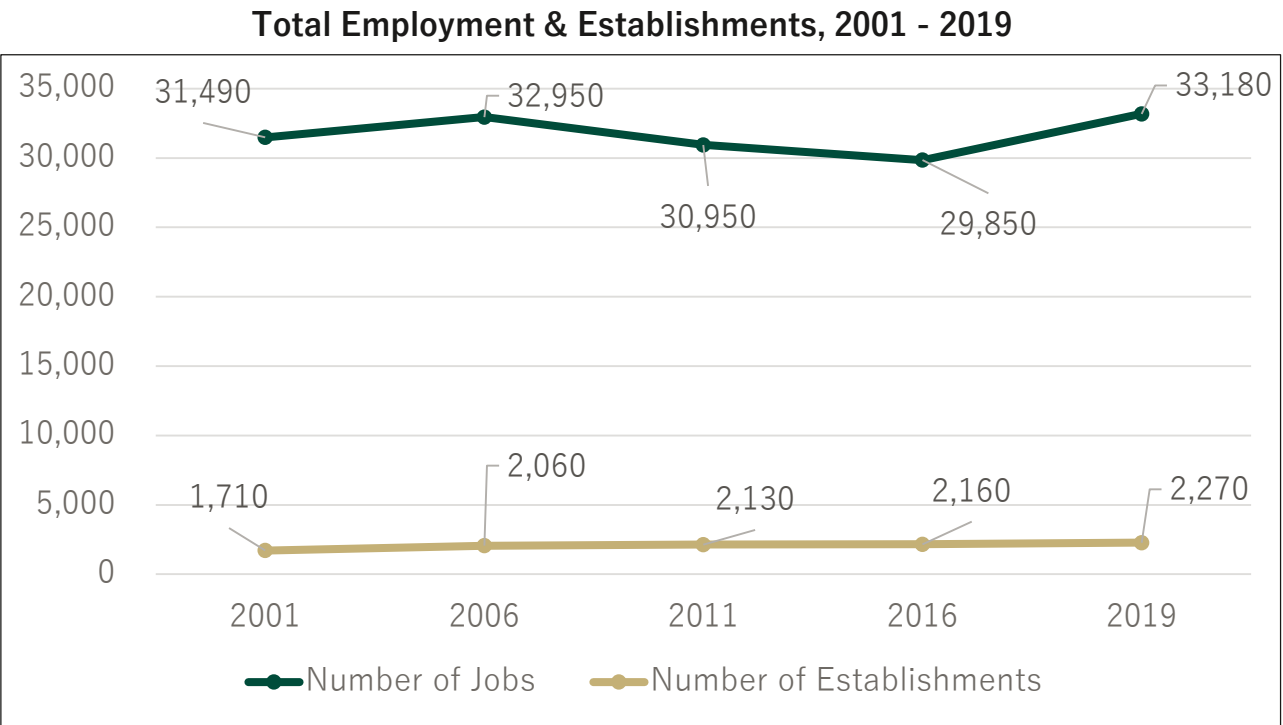
Share of Employment by Industry: Tapscott and Toronto, 2019



Source: City of Toronto Employment Survey, 2019

NAICS Categories	Number of Jobs
Manufacturing	10,100
Transportation, Warehousing and Wholesale Trade	7,360
Retail trade	3,250
Construction	2,970
Business, building and other support services	2,470
Other services (except public administration)	1,480
Accommodation and food services	1,200
Finance, insurance, real estate and leasing	1,130
Professional, scientific and technical services	870
Health care and social assistance	780
Educational services	420
Information and cultural industries	370
Public administration	350
Arts, entertainment and recreation	130
Others	10
Agriculture and Natural Resources	0
Utilities	0
Total	32,890

Source: City of Toronto Employment Survey, 2019



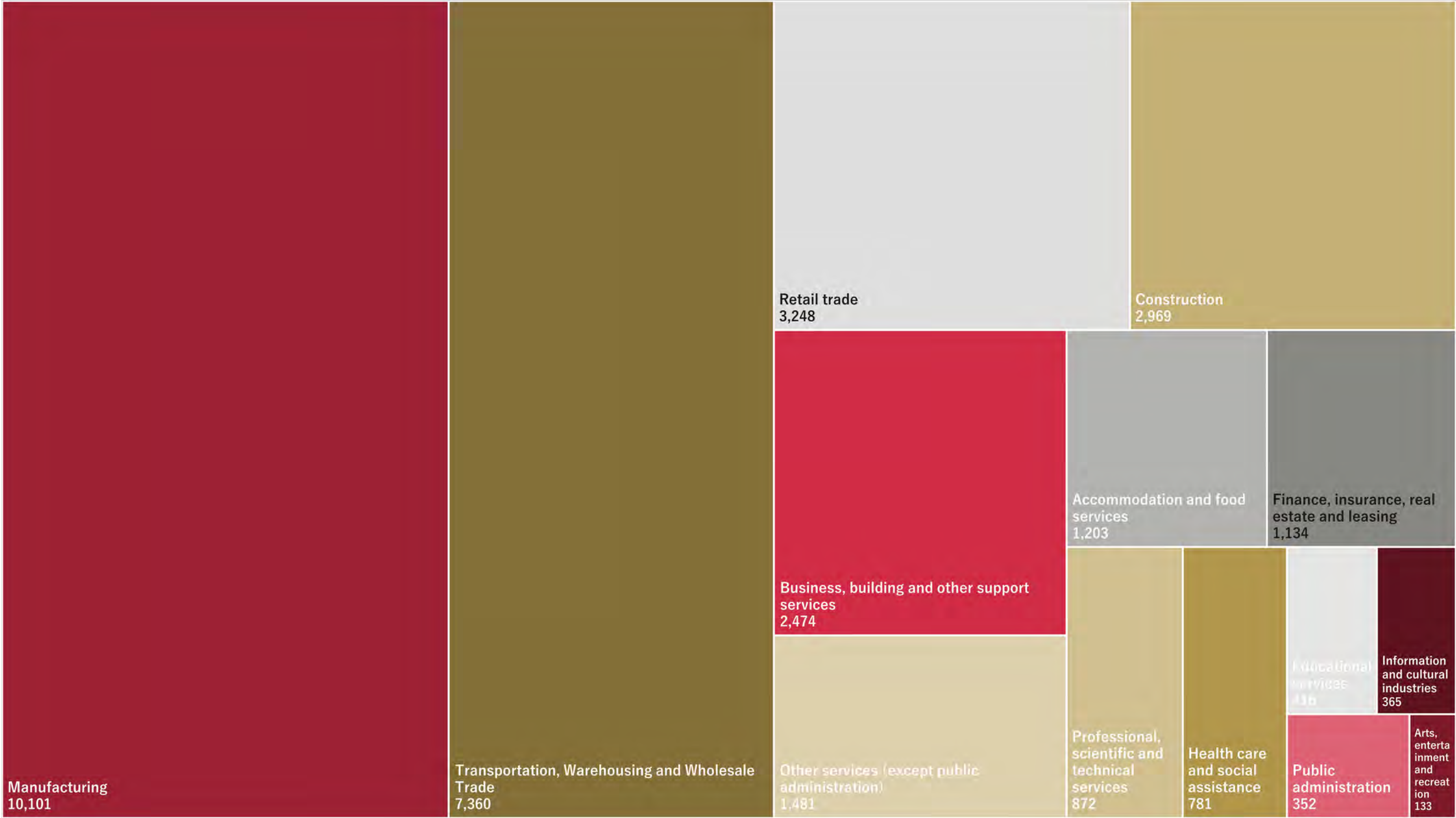
Source: City of Toronto Employment Survey, 2001-2019

Toronto Employment Survey data is confidential and has been provided solely for the purpose of this Study. Aggregated information is available in the [TES Bulletin](#) or on request from City of Toronto Planning, Planning Research and Analytics.





Total Employment by Industry (NAICS), 2019:



\*NAICS: "North American Industry Classification System, v 3.0 2017

Source: Toronto Employment Survey, 2019



Total Establishments by Industry (NAICS), 2019

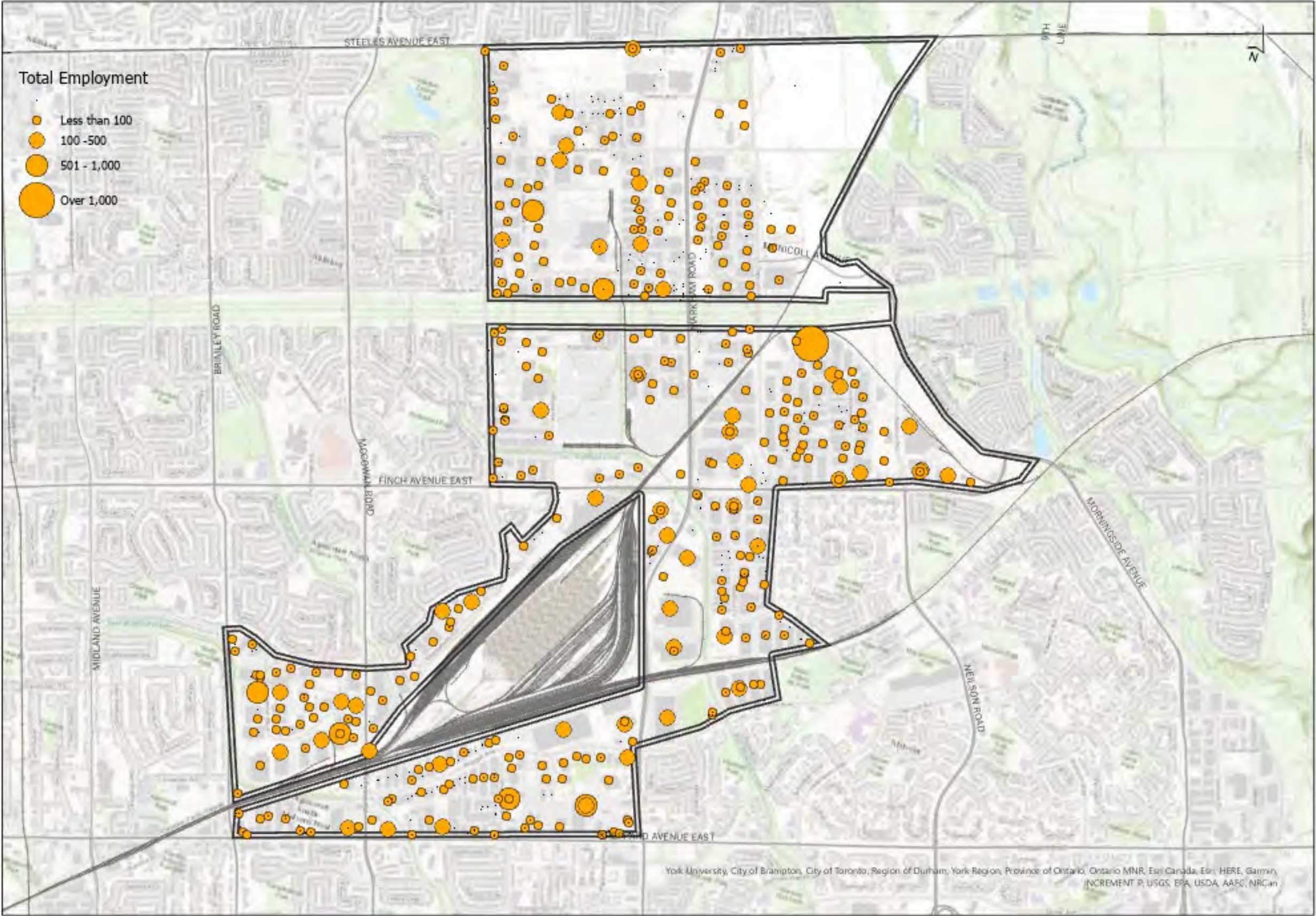


\*NAICS: "North American Industry Classification System, v 3.0 2017

Source: Toronto Employment Survey, 2019



# Employment and Establishments in Tapscott Area



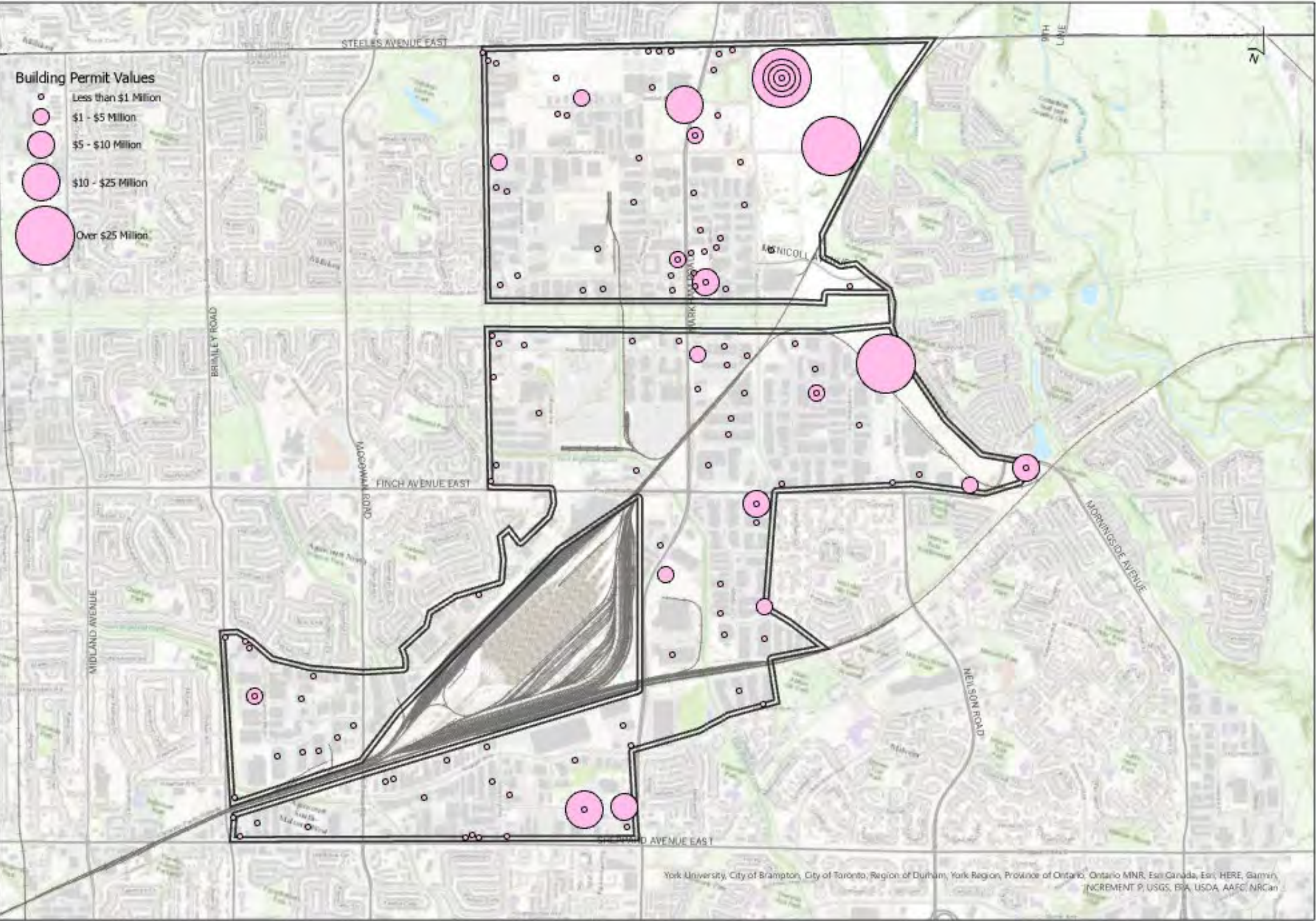
Total Employment by Size of Establishment, 2019

Source: City of Toronto Employment Survey





Value of Non-Residential Building Permits, 2016-2019 in Tapscott Area



Total Non-Residential Investment  
(\$000s): \$570,089

New Building:	\$452,963
Interior Alterations:	\$71,264
Additions:	\$10,015
Multiple Projects:	\$35,847
Demolition:	\$0

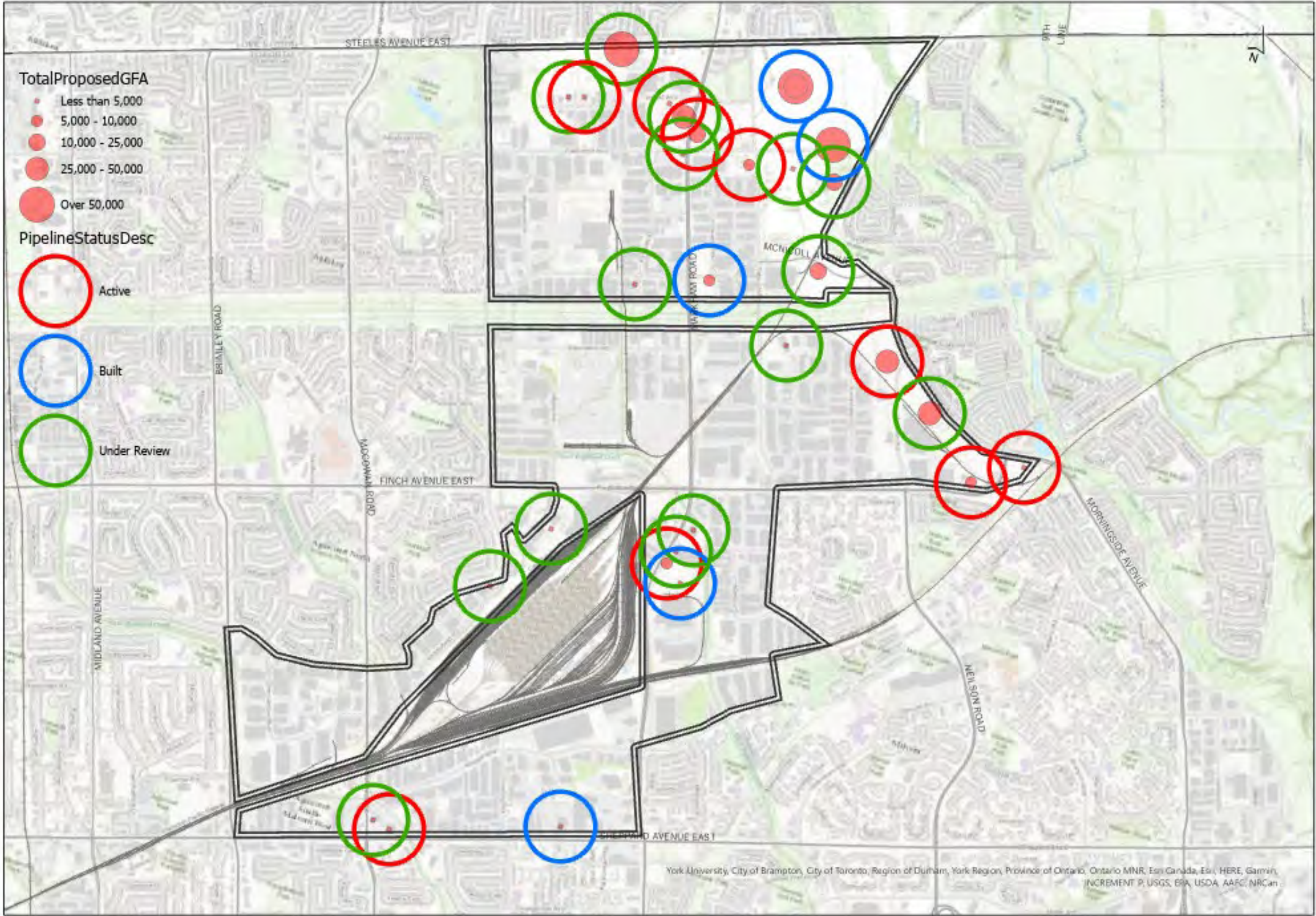
Value of Non-Residential Building Permits, 2016 – 2021

Source: City of Toronto, Building Permits





# Non-Residential Development Proposals by Status, Q2-2021



Total Non-Res GFA in Proposed Developments: 484,630 (sq. m.)

Active:	129,210
Under Review:	177,630
Built:	177,790

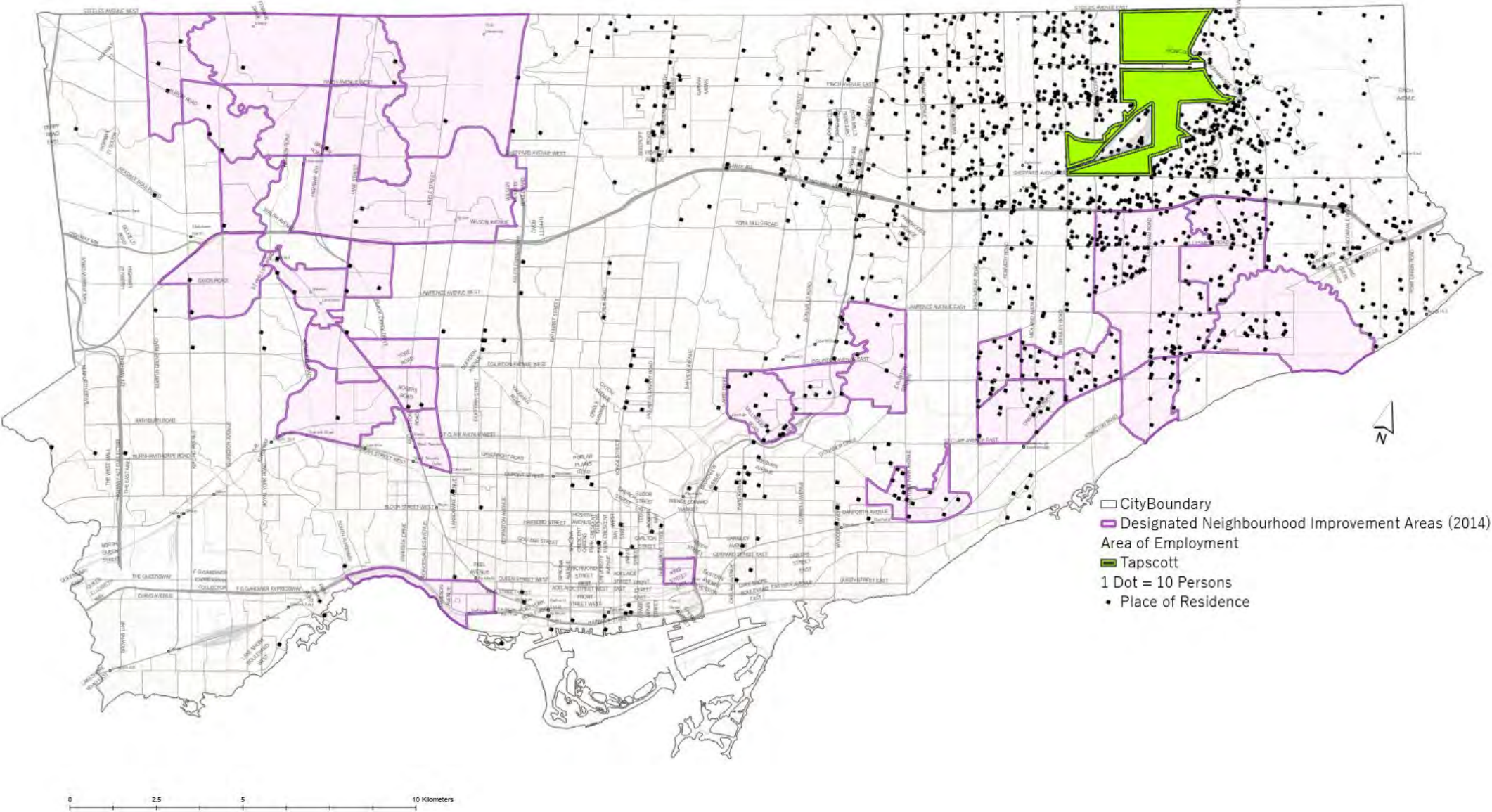
Non-Residential Development Proposals by Status

Source: City of Toronto Development Pipeline



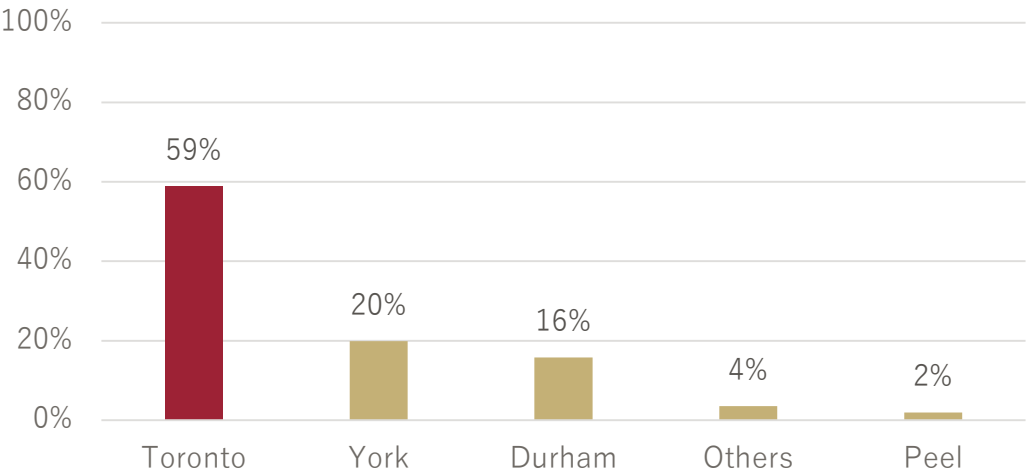


# Place of Residence for Workers in Tapscott Area

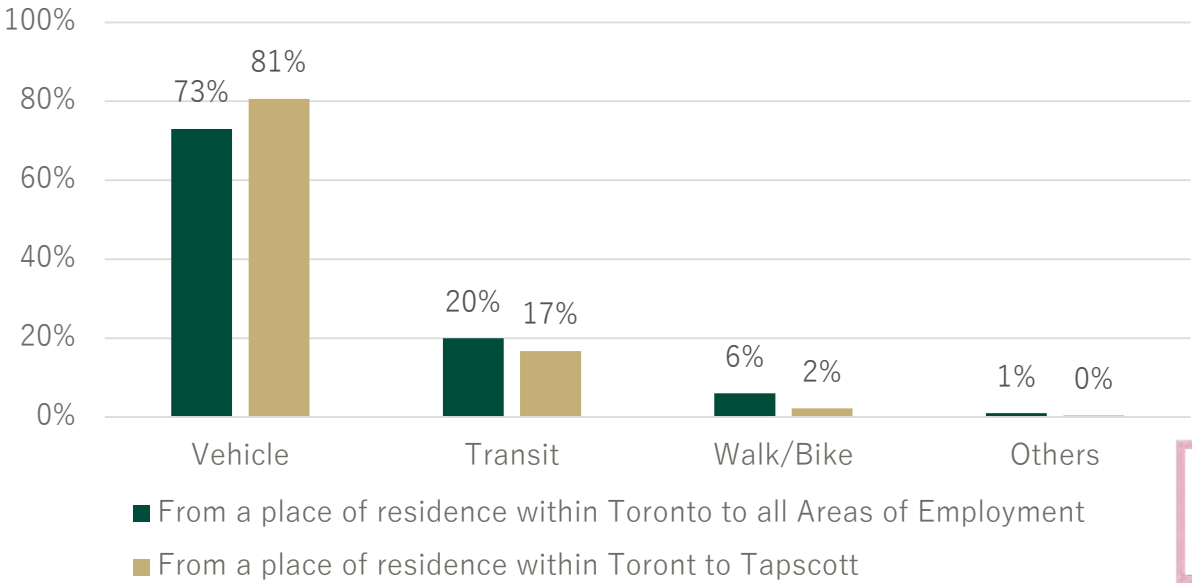


22% of the workforce share residing in Toronto live in Neighbourhood Improvement Areas.

Percent Distribution of Place of Residence



Mode of Transport of Commuters from Within Toronto to All Areas of Employment Compared to Tapscott



Source: Statistics Canada, Place of Work Status- 2016 Census





## **Profile 5**

### **Liberty Village Area of Employment**



# Liberty Village Area of Employment

## Area Context:

Liberty is a historic industrial area just west of Downtown that has transformed into a unique office hub with historic industrial buildings converted to brick and beam style offices, along with new office construction. The historic buildings here offer a product that cannot be authentically replicated elsewhere.



Key Map



Source: City of Toronto 3D Massing

<b>Key Facts:</b>	
Total Land Area (net ha)	20 ha
Total Employment	11,116
Total Establishments	409
Rentable Building Area (Industrial)**	0.32 Million Square Feet
Vacancy Rate(2021)	2.0%
Employment Density (Net Jobs/ ha)	555.4

\*\* Source: CoStar Group, [www.costar.com](http://www.costar.com)





# Liberty Village Area of Employment: Overview



## Top Employers:

- Softchoice
- Cossette
- Toronto Police Service
- 9 Story
- Loblaws Digital

## Function & Focus

- The 11,000 jobs found here are overwhelmingly concentrated in Professional, Scientific and Technical Services (53%) and Information and Cultural Industries (19%), reflecting the office character of the area.
- Employment here has grown by 2700 jobs since 2016.
- 14% of Toronto’s Information and Cultural jobs are located in this geographically small area of 20 ha, where the employment density is 555 jobs per ha.
- The area caters to non-corporate users seeking non-traditional office space, with a concentration of information, technology and cultural firms here, including space for start-ups.
- \$135 million has been invested in new buildings and refurbishments over the past five years.
- Currently there is only about 62,000 square metres of new non-residential space planned for the Liberty area.
- A very high proportion of workers here live in the City and a significant number walk or bike to work, demonstrating the critical nature of these employment lands from a sustainable community perspective.
- Fully 83% of the Liberty Village workforce live within Toronto, and 13% of those live in Neighbourhood Improvement Areas.
- 36% of the Toronto resident workforce commute by transit while 32% arrive on foot or by bicycle.

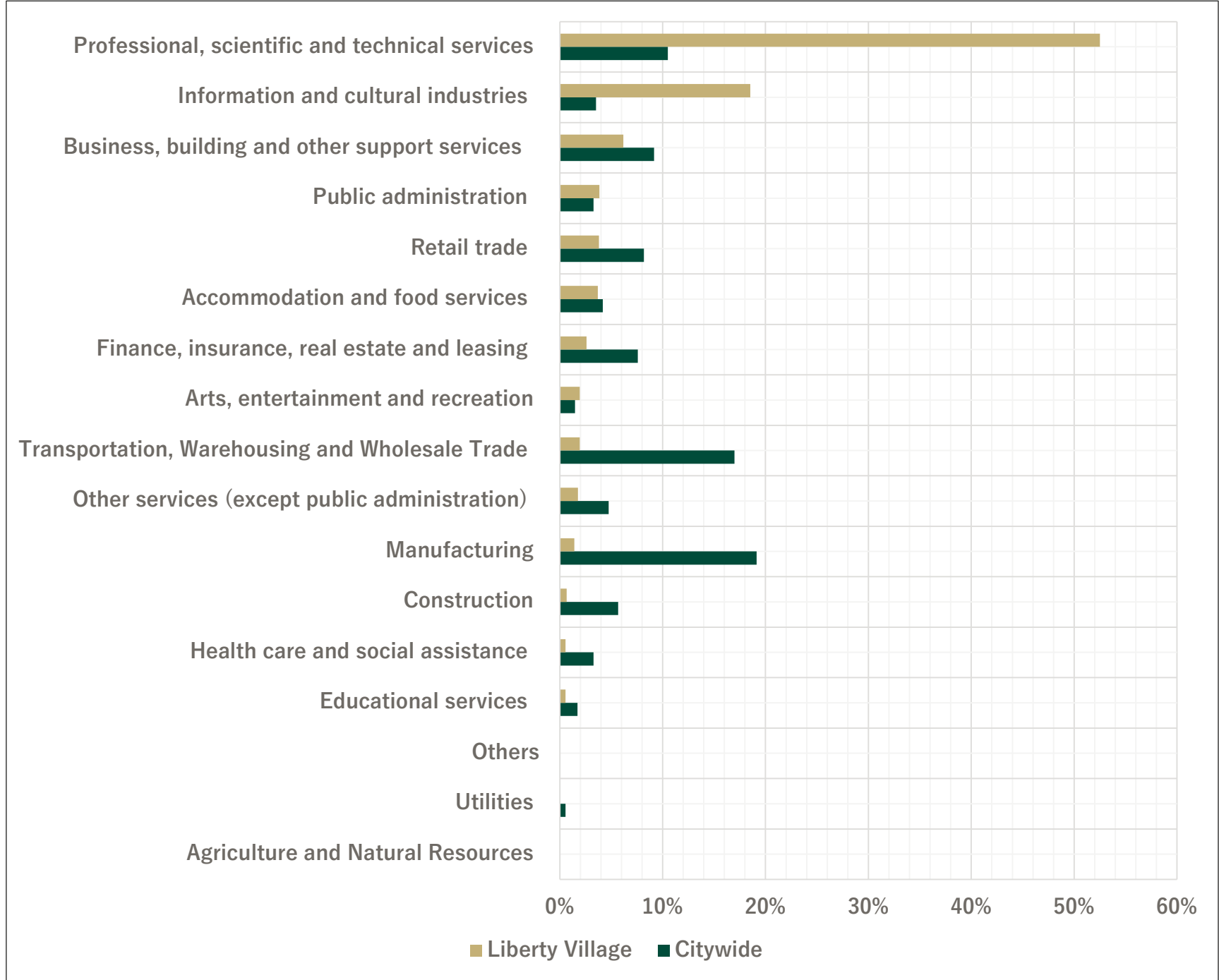
## Outlook

- The mixed use area to the east has seen significant high-density residential development in recent years.
- This area will continue to attract niche start-up firms and establishments that are attracted to the unique building space and the local workforce.



# Share of Employment by Industry: Liberty Village and Toronto, 2019

Share of Employment by Industry: Liberty Village and Toronto, 2019

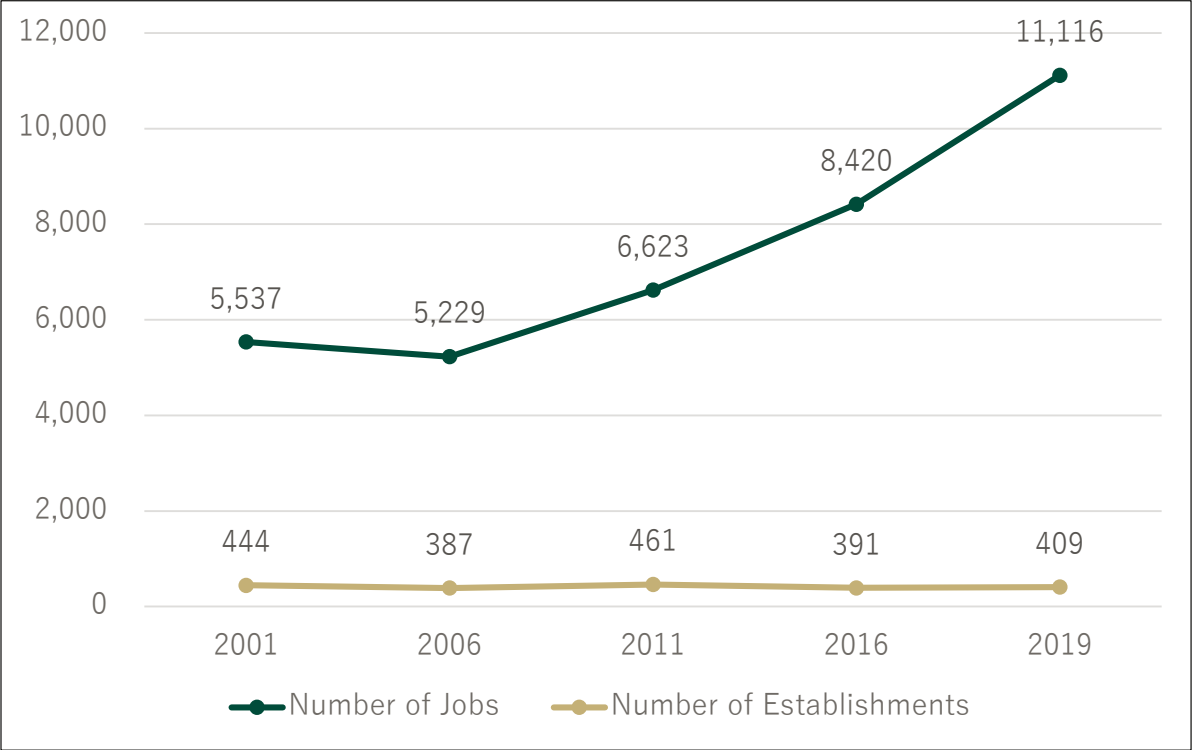


Source: City of Toronto Employment Survey, 2019

NAICS Categories	Number of Jobs
Professional, scientific and technical services	5,840
Information and cultural industries	2,060
Business, building and other support services	690
Public administration	430
Retail trade	420
Accommodation and food services	410
Finance, insurance, real estate and leasing	290
Transportation, Warehousing and Wholesale Trade	220
Arts, entertainment and recreation	220
Other services (except public administration)	200
Manufacturing	160
Construction	70
Health care and social assistance	60
Educational services	60
Others	0
Agriculture and Natural Resources	0
Utilities	0
Total	11,120

Source: City of Toronto Employment Survey, 2019

Total Employment & Establishments, 2001 - 2019



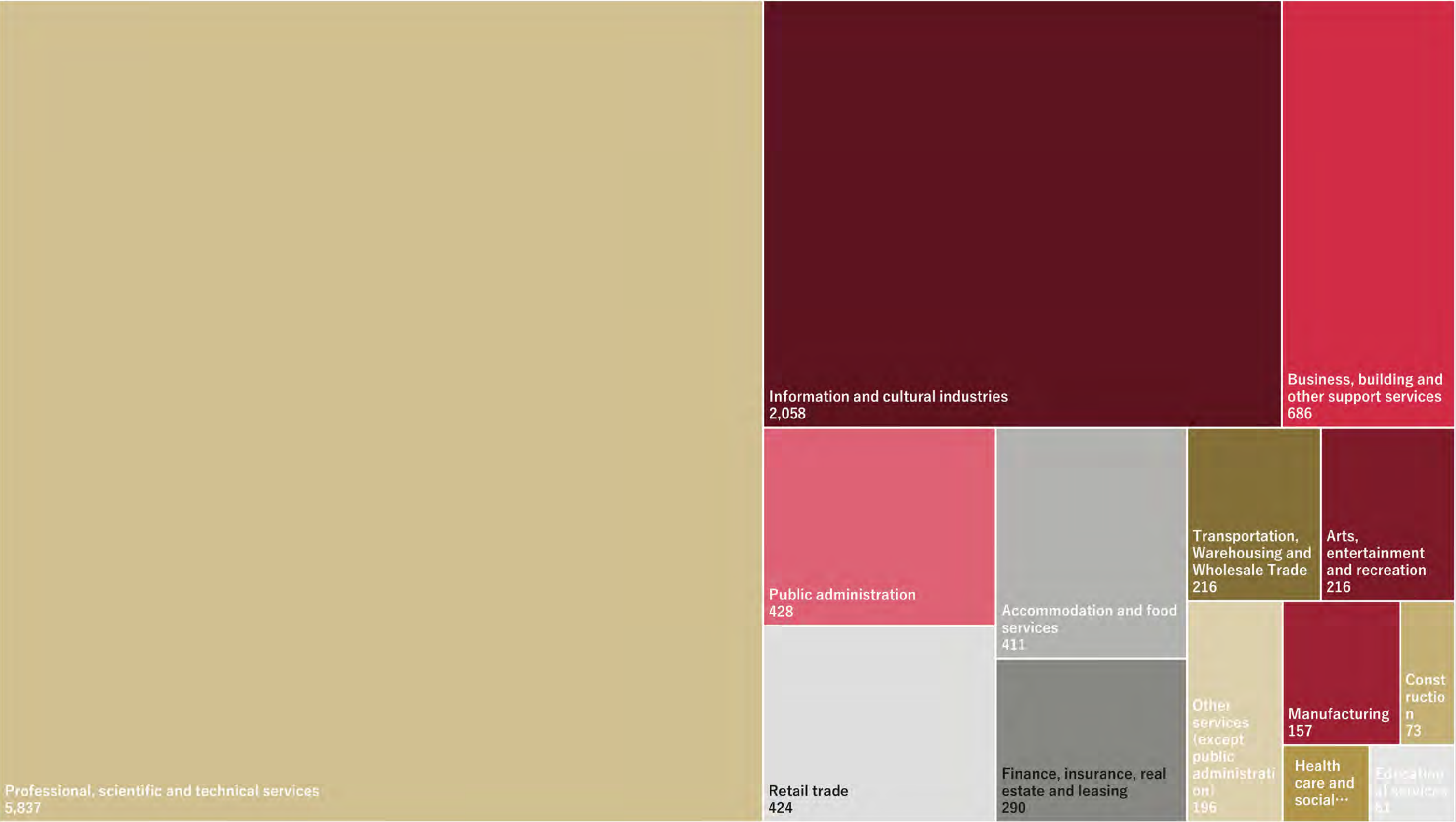
Source: City of Toronto Employment Survey, 2001 - 2019

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Total Employment by Industry (NAICS), 2019



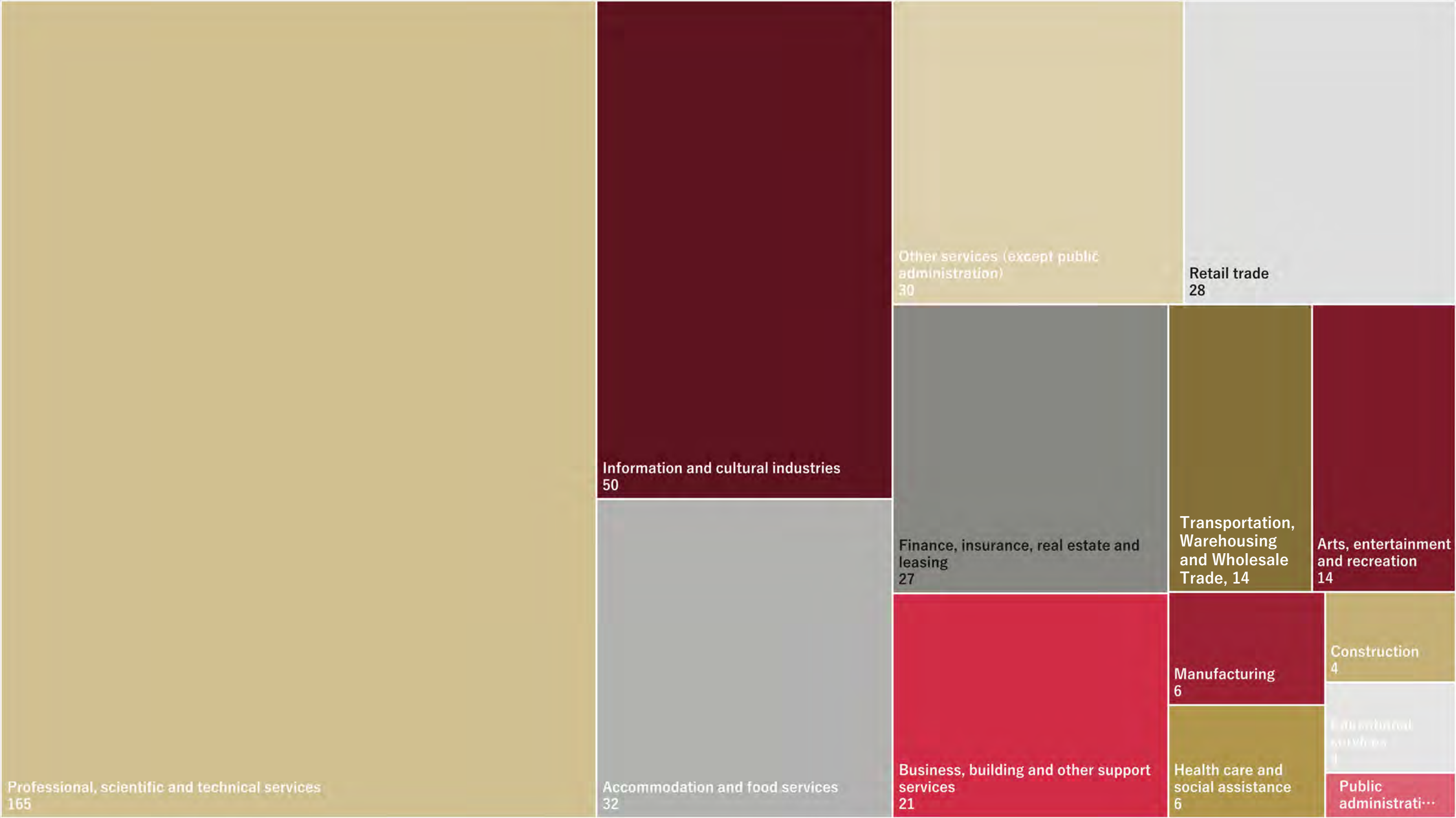
\*NAICS: "North American Industry Classification System, v 3.0 2017

Source: Toronto Employment Survey, 2019





Total Establishments by Industry (NAICS), 2019

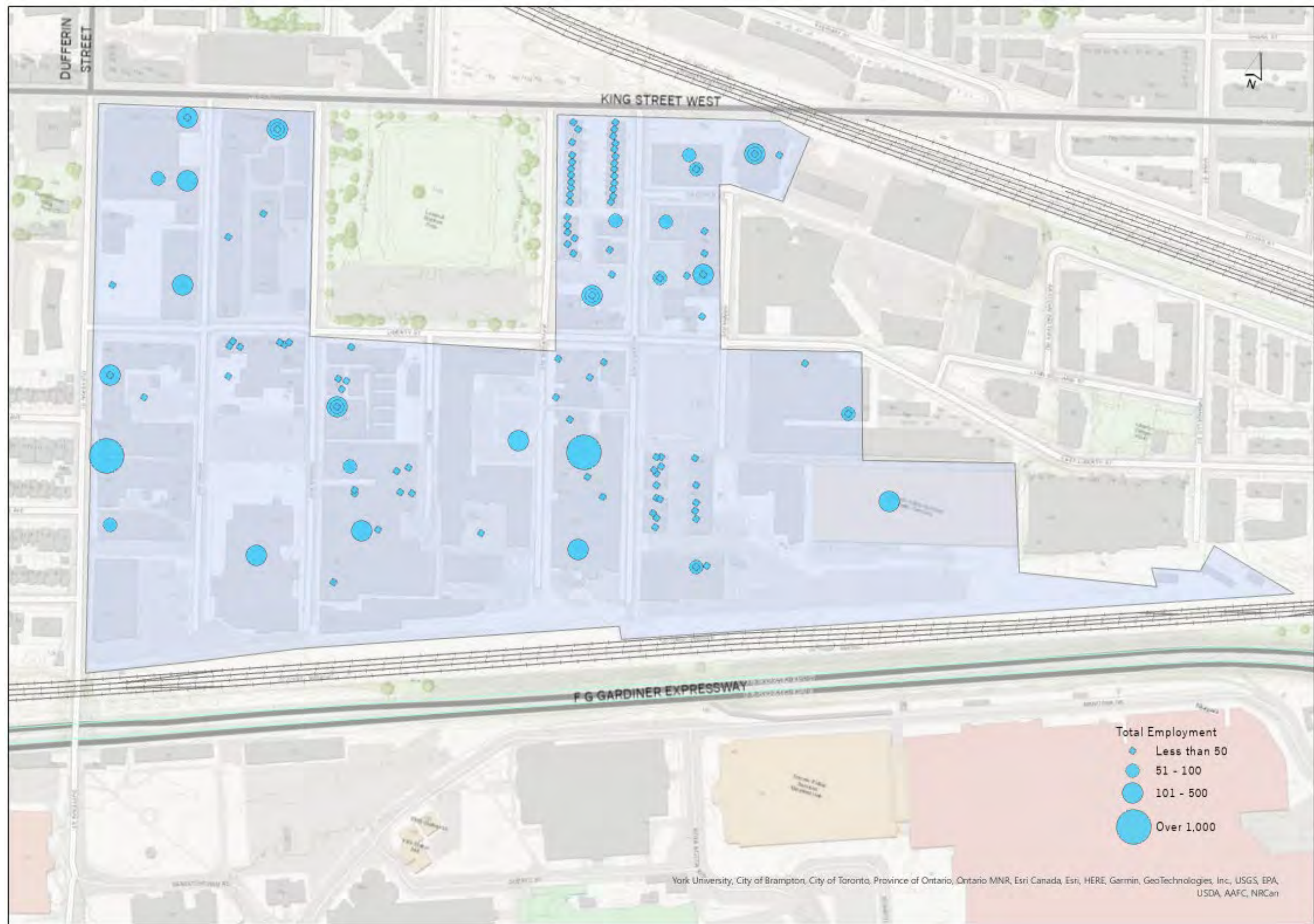


\*NAICS: "North American Industry Classification System, v 3.0 2017

Source: Toronto Employment Survey, 2019



Employment and Establishments in Liberty Village Area of Employment



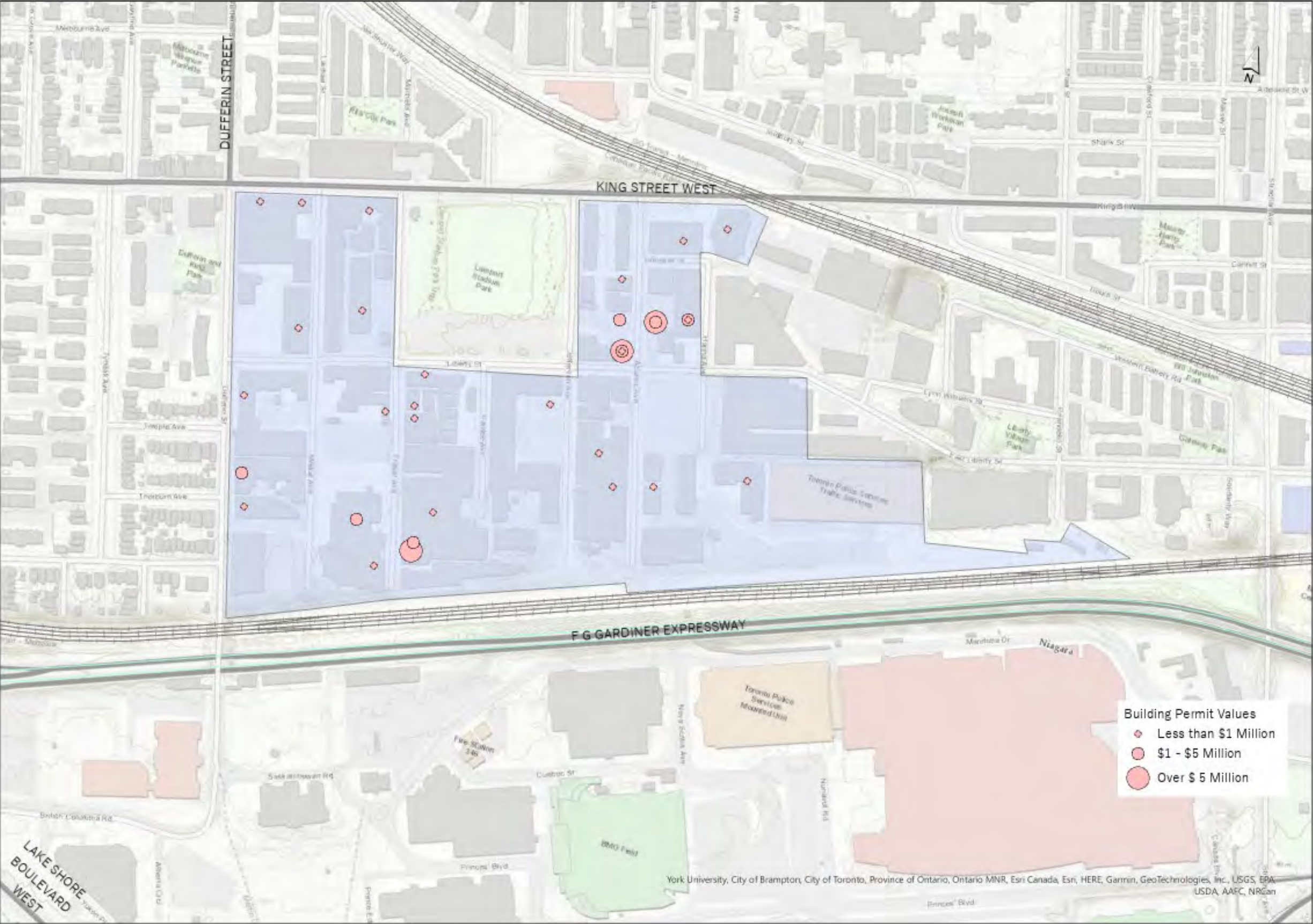
Total Employment by Size of Establishment, 2019

Source: City of Toronto Employment Survey





Value of Non-Residential Building Permits, 2016-2019 in Liberty Village Area of Employment

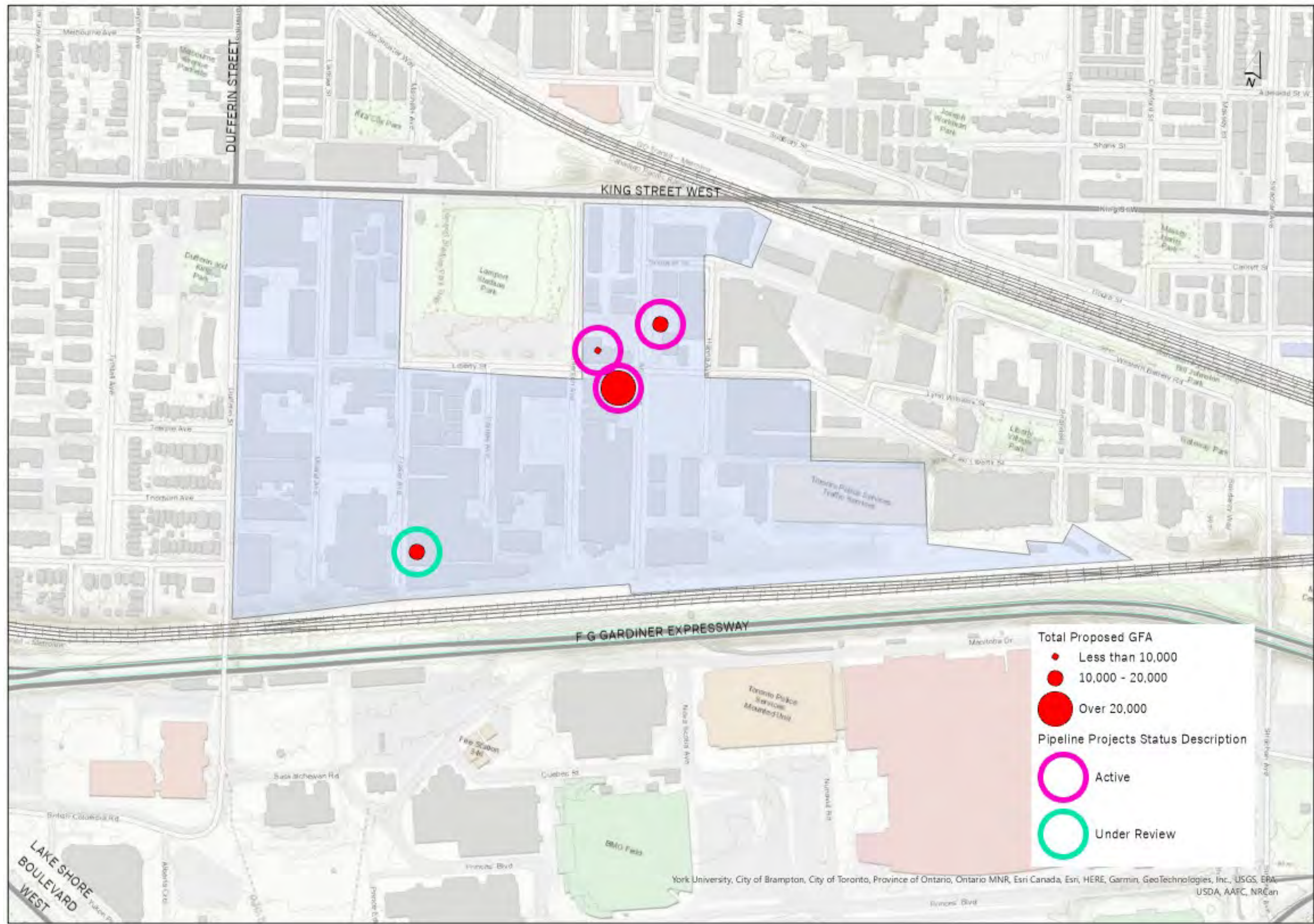


Total Value of Non-Residential Building Permits, 2016-2019 (\$ ,000s) \$ 135,394

New Buildings	\$35,000
Interior Alterations	\$62,047
Additions	\$900
Multiple Projects	\$37,447
Demolition	\$0



Non-Residential Development Proposals by Status, Q2-2021



Total Non-Residential GFA in Proposed Developments: 61,820 (Square Meters)

Active	45,600
Under Review	16,220
Built	0

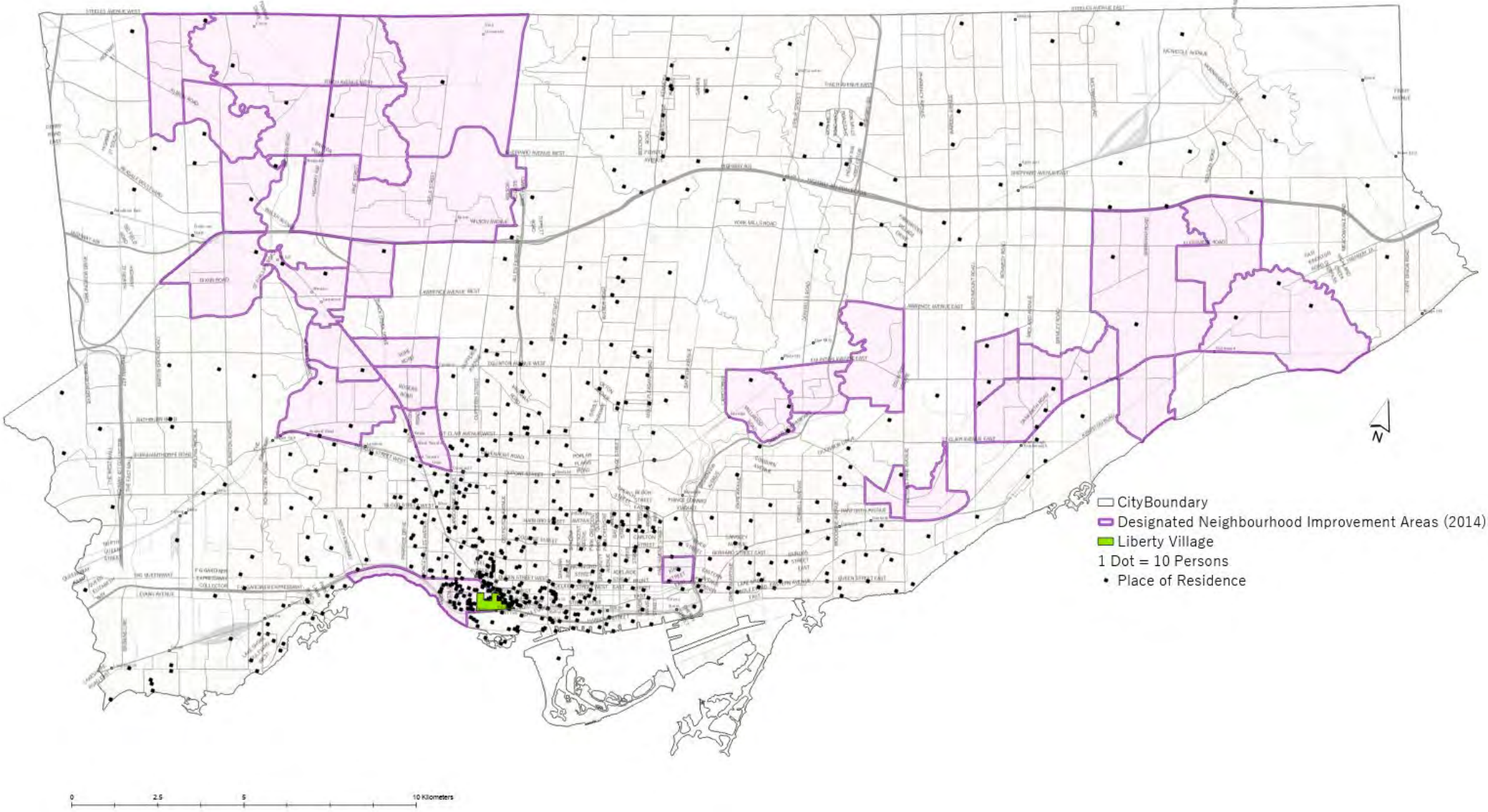
Non-Residential Development Proposals by Status

Source: City of Toronto Development Pipeline

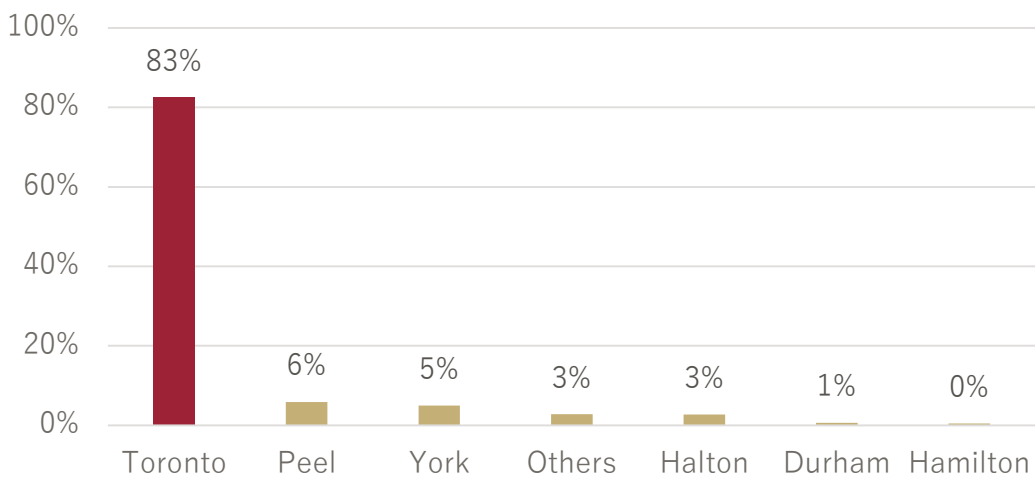




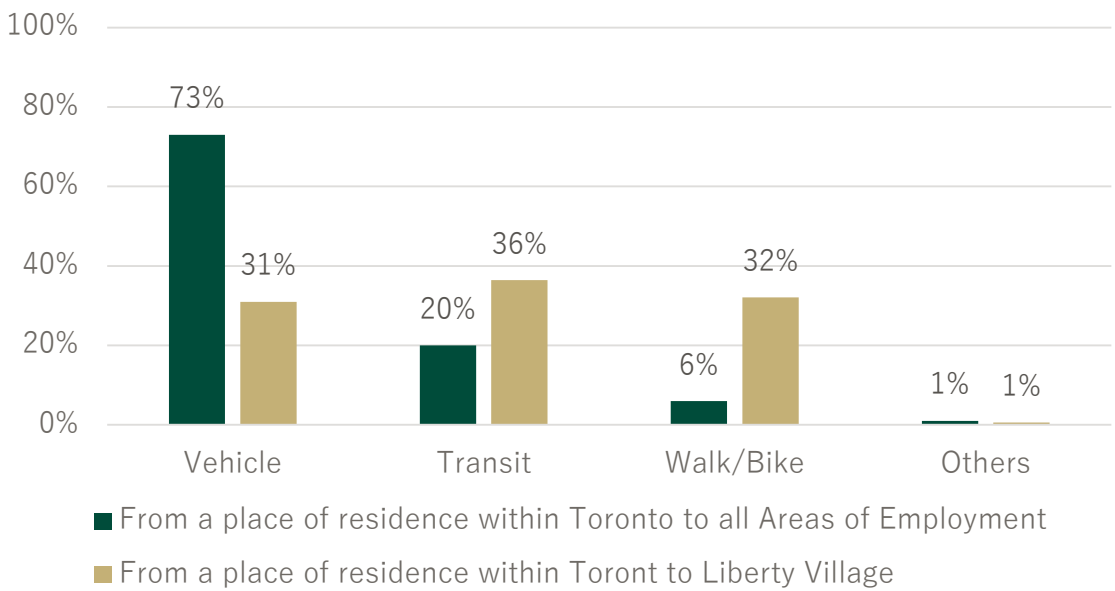
# Place of Residence for Workers in Liberty Village Area of Employment



Percent Distribution of Place of Residence



Mode of Transport of Commuters from Within Toronto to All Areas of Employment Compared to Liberty Village



Source: Statistics Canada, Place of Work Status- 2016 Census





## **Profile 6**

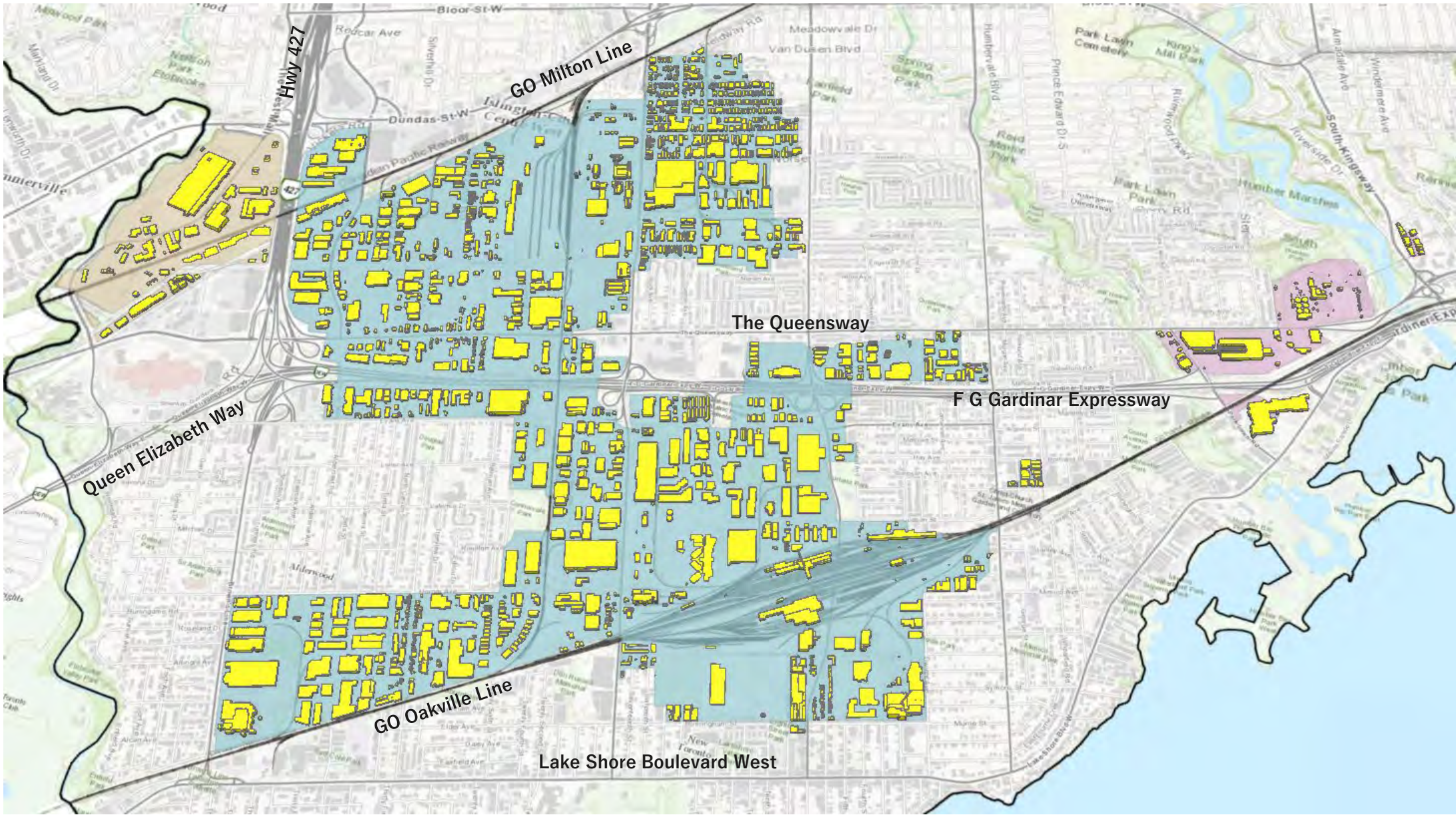
### **South Etobicoke Area of Employment**



# South Etobicoke Area of Employment

## Area Context:

South Etobicoke represents the second concentration of land designated employment areas in Toronto. Located in the south-west corner of the city, with excellent transportation access, it is a desirable location owing to its adjacency to the Queen Elizabeth Way and Highway 427. It also is quite accessible for workers, by road and by transit.



Source: City of Toronto 3D Massing



Key Map

## Key Facts:

Total Land Area (Net Ha)	833.7 ha
Total Employment	43,028
Total Establishments	1,738
Rentable Building Area**(Industrial)	27.3 million sft.
Vacancy Rate(2021)	3.7 %
Employment Density (Net jobs/ha)	51.6

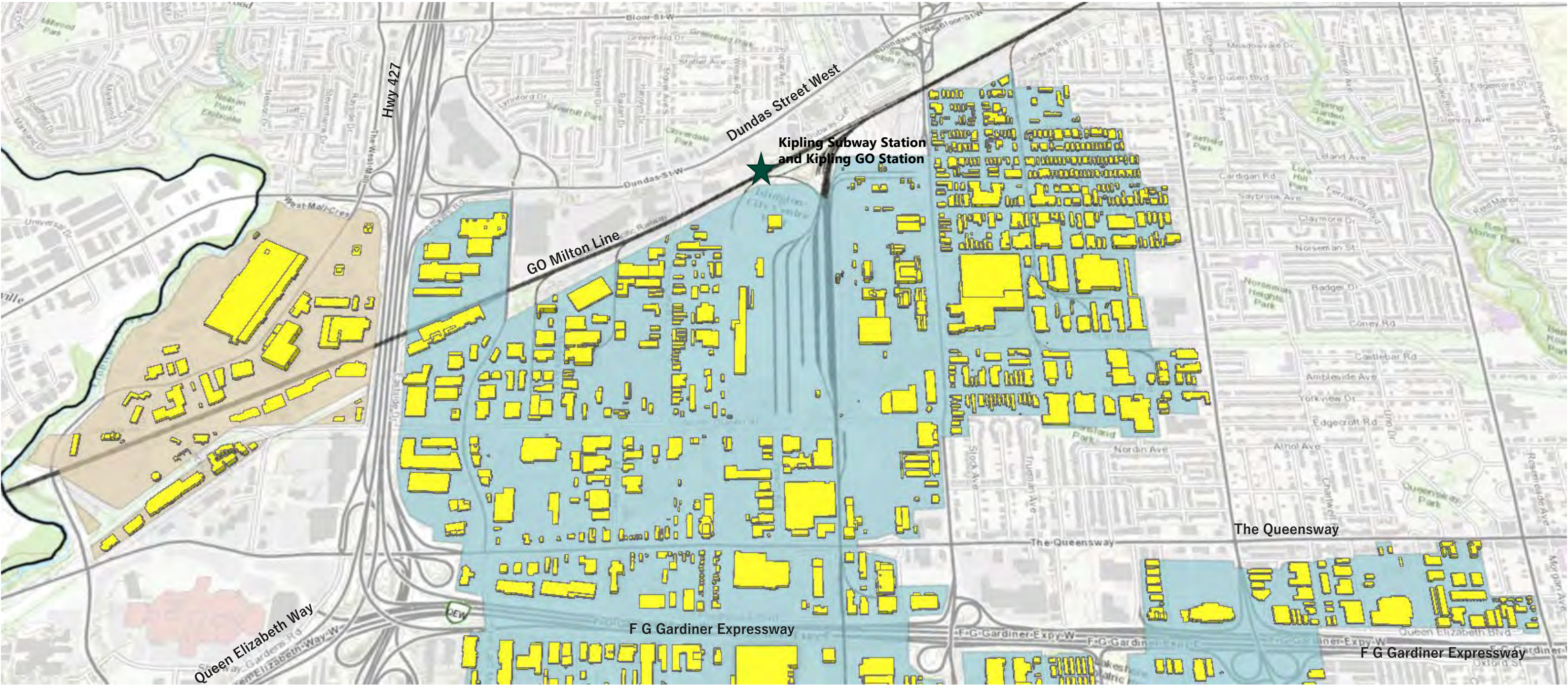
\*\* Source: CoStar Group, [www.costar.com](http://www.costar.com)

## Top Employers:

- Willowbrook Maintenance Facility
- Ontario Gov’t. (Detention Centre)
- Purolator Courier
- SNC Lavalin
- Metro Canada Co.



# South Etobicoke Area – North Portion



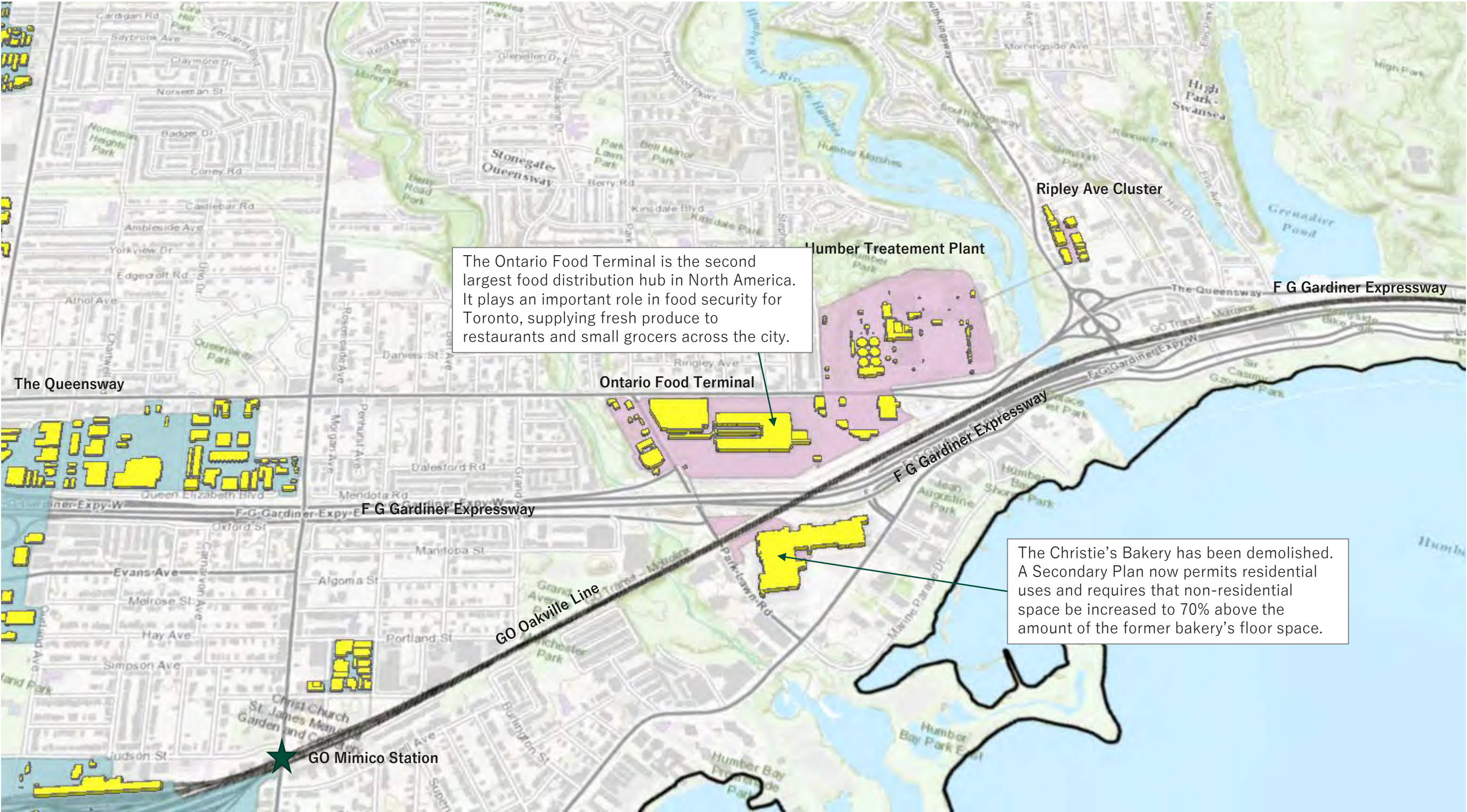
## Function & Focus

- South Etobicoke appeals to a broad pool of firms including large manufacturing / distributors and smaller-scale local-serving businesses as well as last-mile fulfilment centres.
- The past couple of decades has seen the departure of some major traditional manufacturers. Replacement businesses have occupied the older buildings, or demolished and rebuilt.
- The film industry, production and support functions, have established a foothold in South Etobicoke.
- The area appeals to small, service-oriented industrial firms, last-mile fulfilment centres, and film production, among others.
- Total employment is over 43,000, an increase of over 5,000 since 2011.
- Jobs are concentrated in Transportation, Warehousing & Wholesale Trade (28% or 17% of all Toronto jobs in this industry) and Manufacturing (17% or 9% of all Toronto jobs).
- Interestingly, 12% of all Toronto jobs in Information & Cultural Industries are located in South Etobicoke; and 10% of all Professional, Scientific & Technical Services jobs are found here.
- There is over 27 million sq. ft. of industrial space with a healthy vacancy rate of 3.7%.





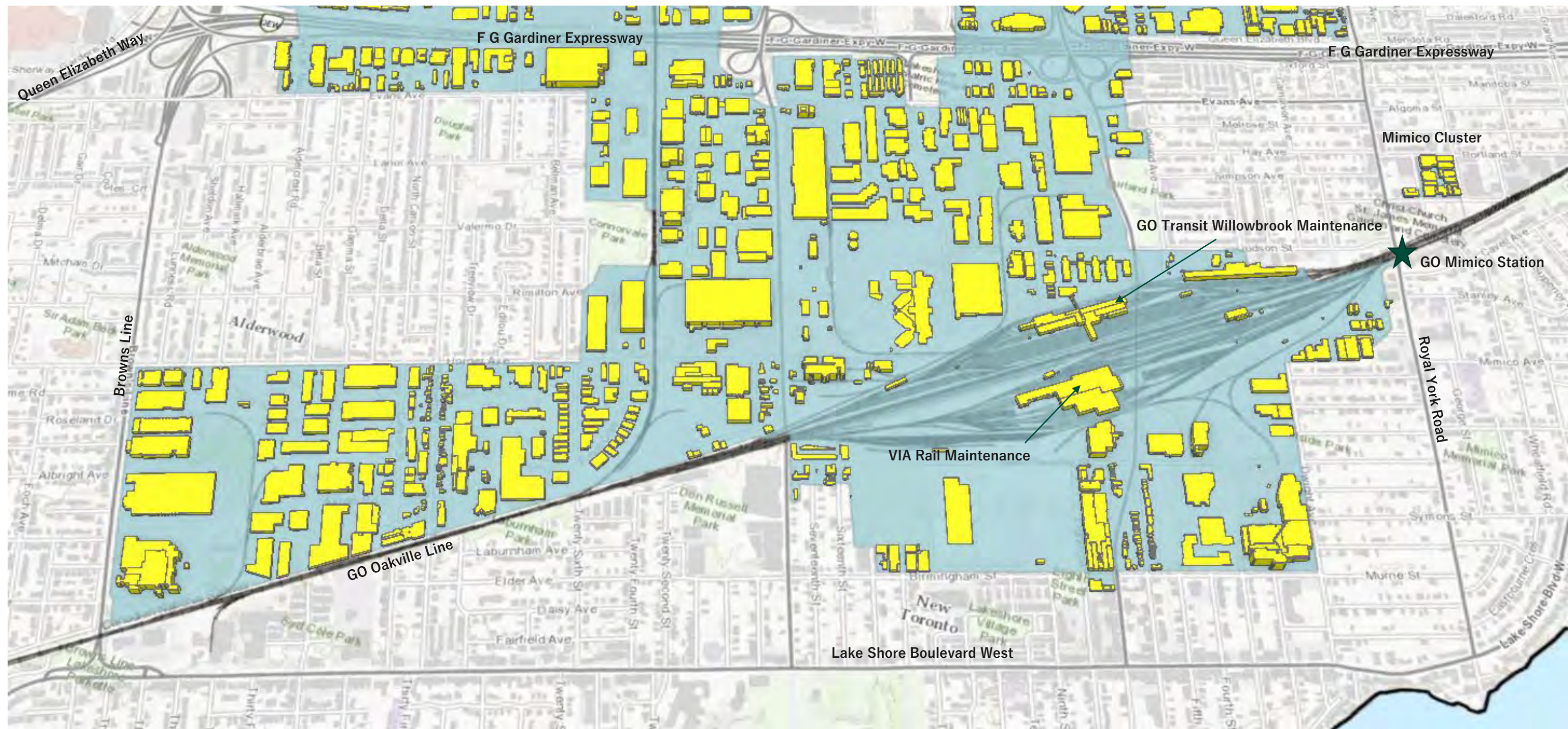
# South Etobicoke Area – East Portion



- \$358 million has been invested in new buildings and alterations over the past five years.
- Currently, there is over 300,000 square metres of non-residential space in development.
- Of the 59% of South Etobicoke workers who live within the City of Toronto (25,500), 41% chose a low-carbon mode of travel to work: 34% use transit, while 7% walk or bicycle.
- 19% of those workers reside in Neighbourhood Improvement Areas.



# South Etobicoke Area – South Portion



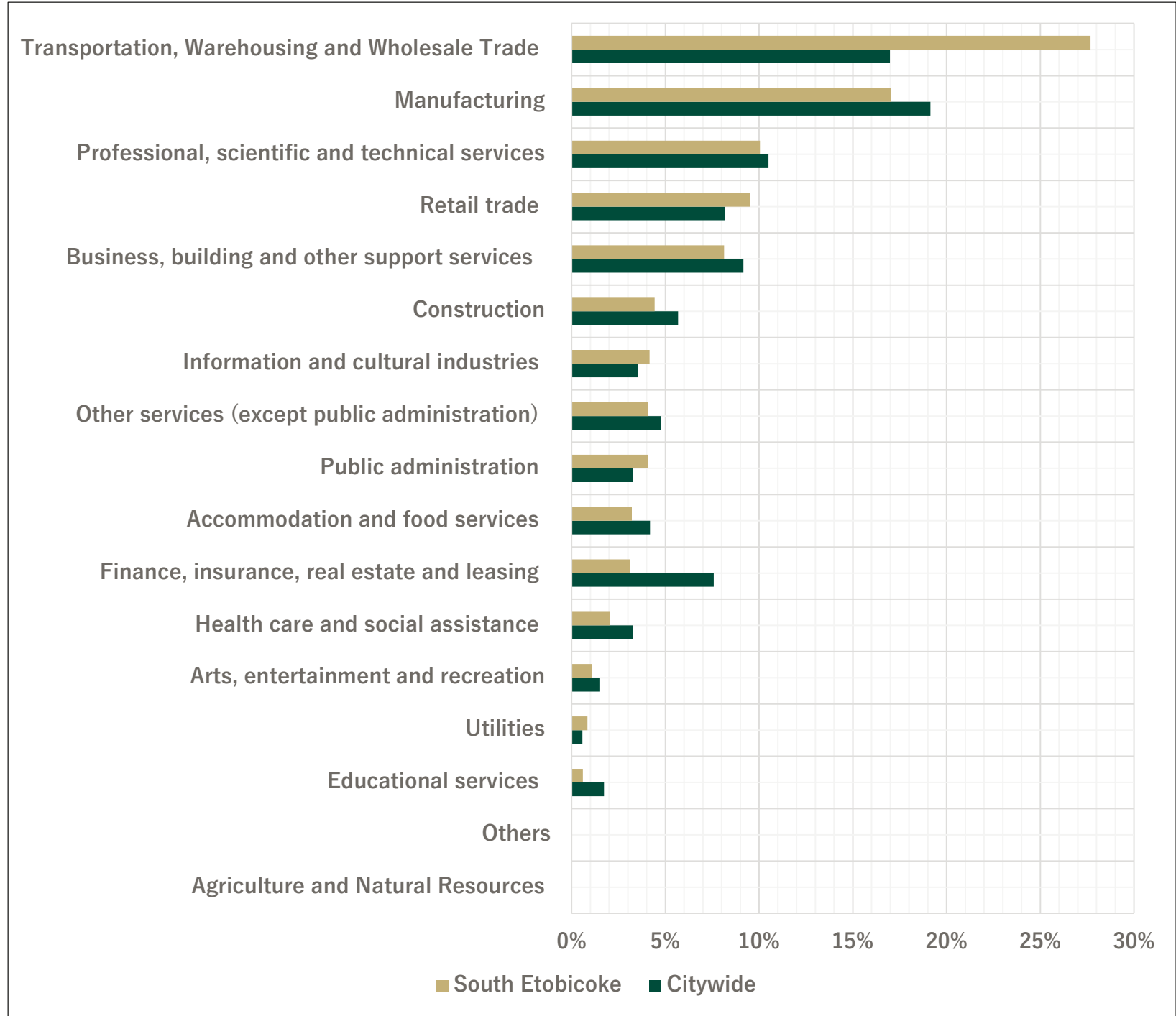
## Outlook

- The outlook remains positive as this area is well suited to labour-intensive uses across a range of industries, benefitting from highway access and accessibility to Downtown Toronto.



# Share of Employment by Industry: South Etobicoke and Toronto, 2019

Share of Employment by Industry: South Etobicoke and Toronto, 2019

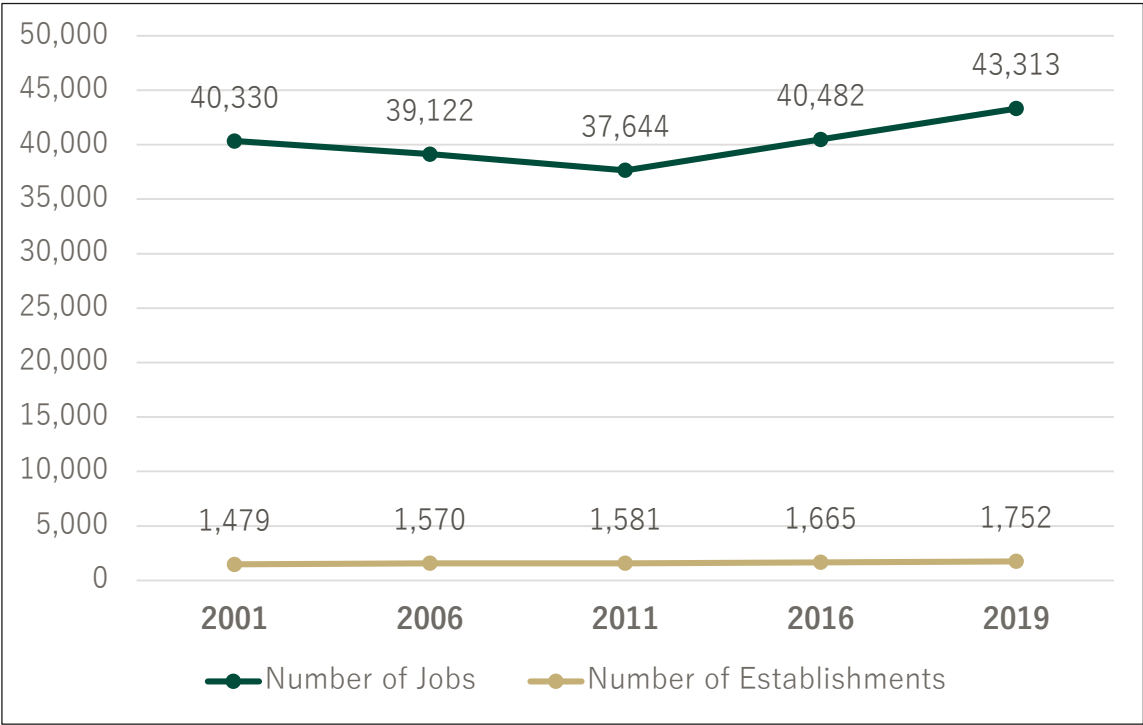


Source: City of Toronto Employment Survey, 2019

NAICS Categories	Number of Jobs
Transportation, Warehousing and Wholesale Trade	11,910
Manufacturing	7,320
Professional, scientific and technical services	4,320
Retail trade	4,090
Business, building and other support services	3,500
Construction	1,910
Information and cultural industries	1,790
Other services (except public administration)	1,750
Public administration	1,750
Accommodation and food services	1,380
Finance, insurance, real estate and leasing	1,340
Health care and social assistance	890
Arts, entertainment and recreation	470
Utilities	370
Educational services	260
Agriculture and Natural Resources	0
Others	0
Total	43,030

Source: City of Toronto Employment Survey, 2019

Total Employment & Establishments, 2001 - 2019



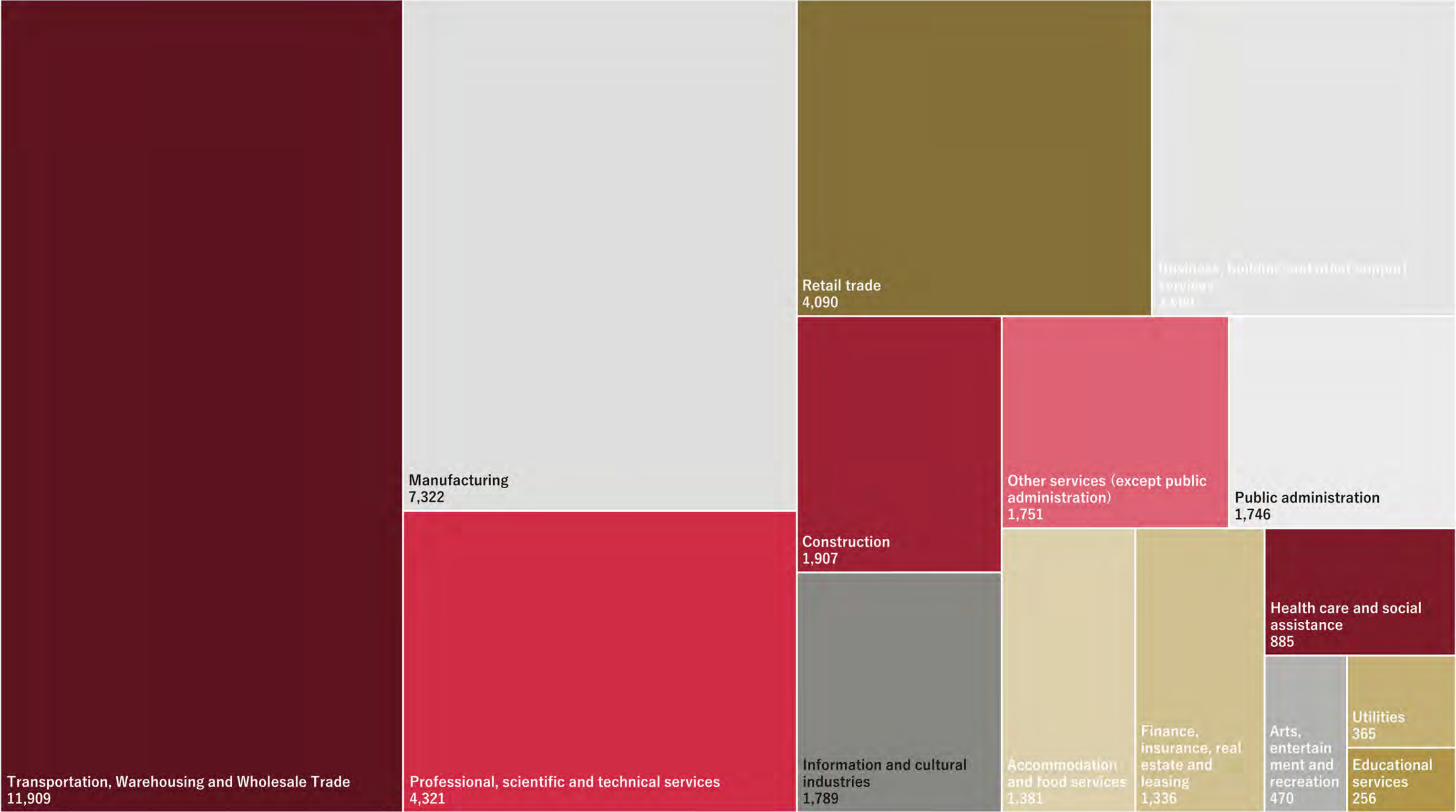
Source: City of Toronto Employment Survey, 2001-2019

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Total Employment by Industry (NAICS), 2019



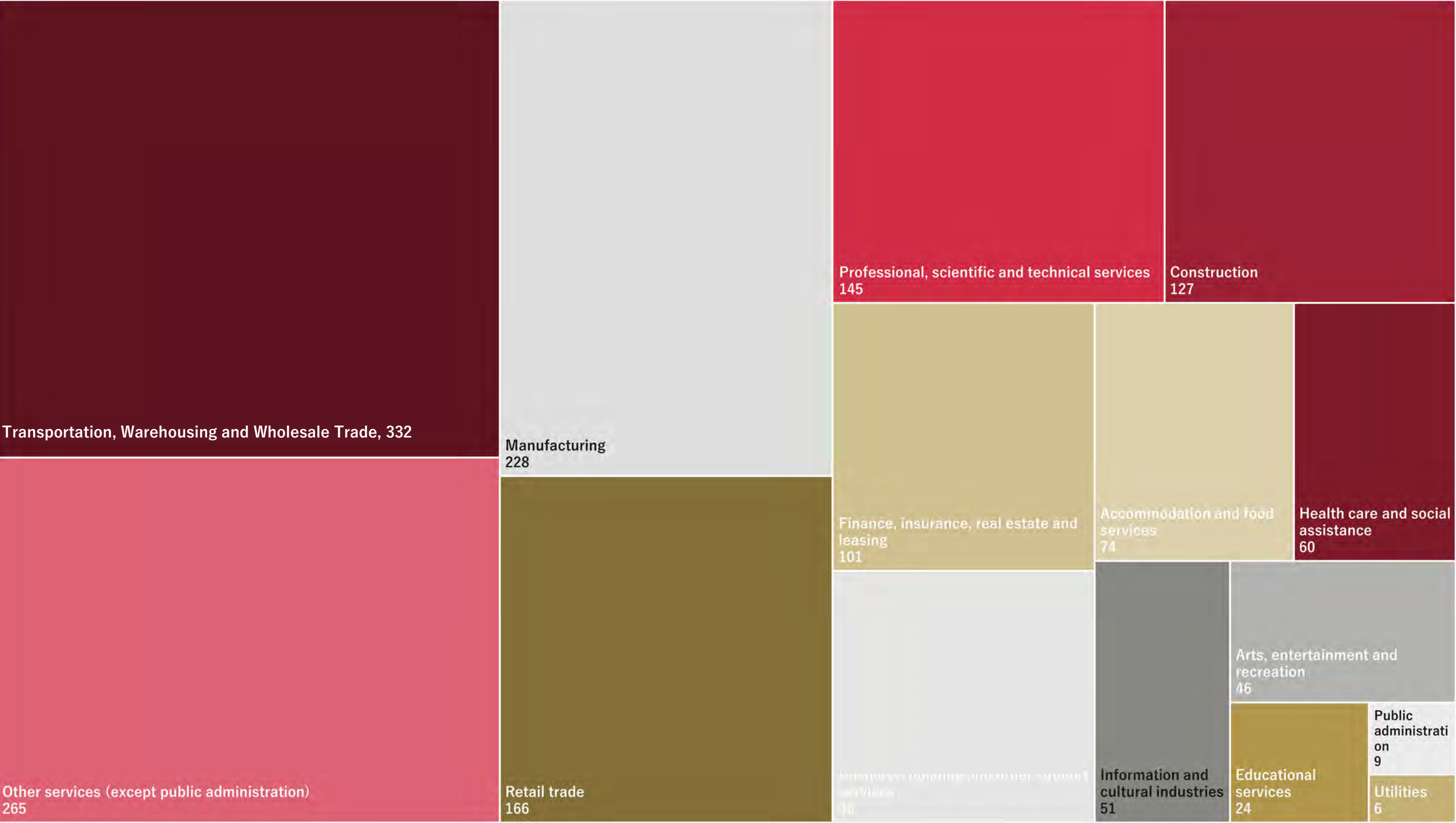
\*NAICS: "North American Industry Classification System, v 3.0 2017

Source: Toronto Employment Survey, 2019





Total Establishments by Industry (NAICS), 2019

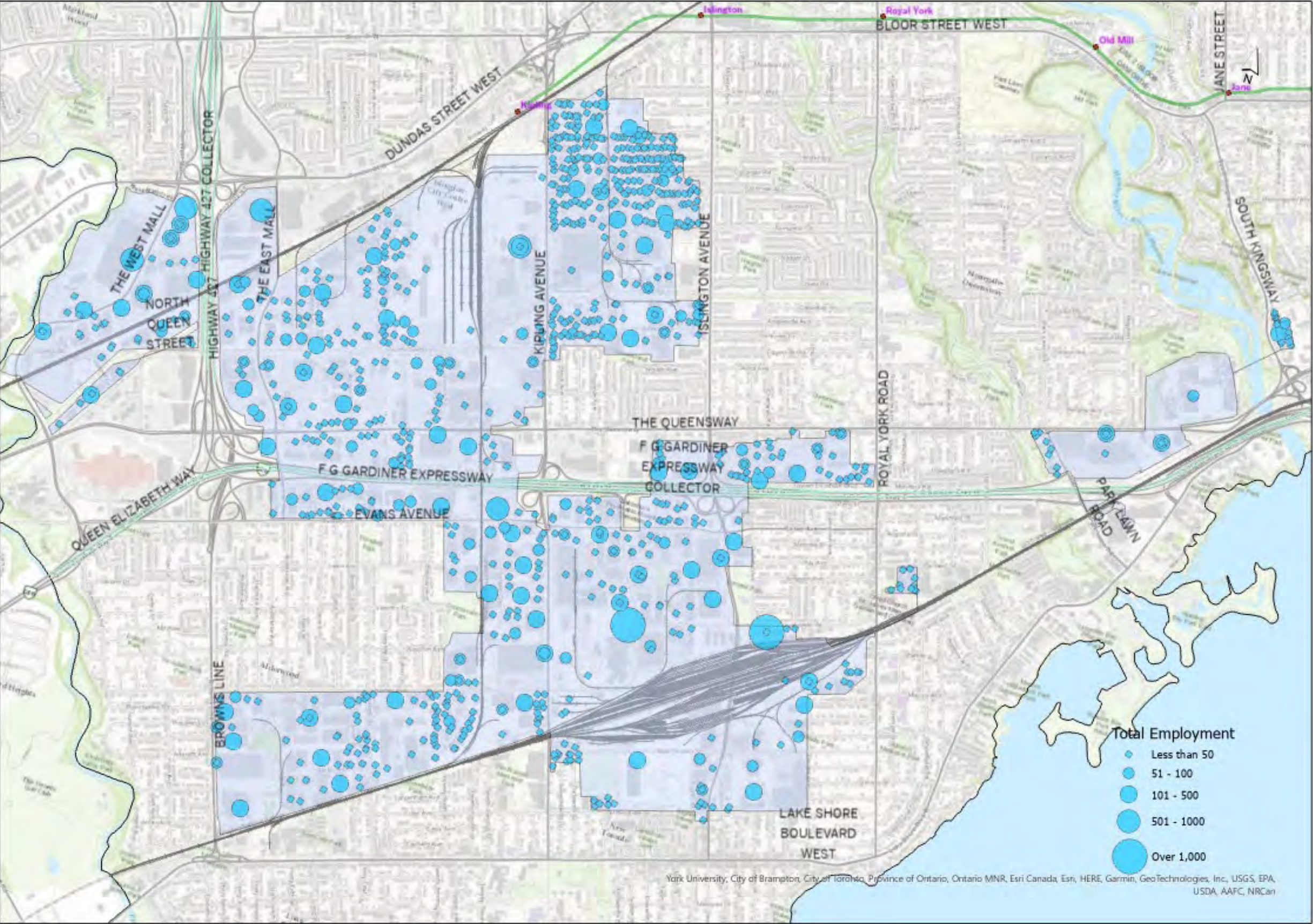


\*NAICS: "North American Industry Classification System, v 3.0 2017

Source: Toronto Employment Survey, 2019



# Employment and Establishments in South Etobicoke Area

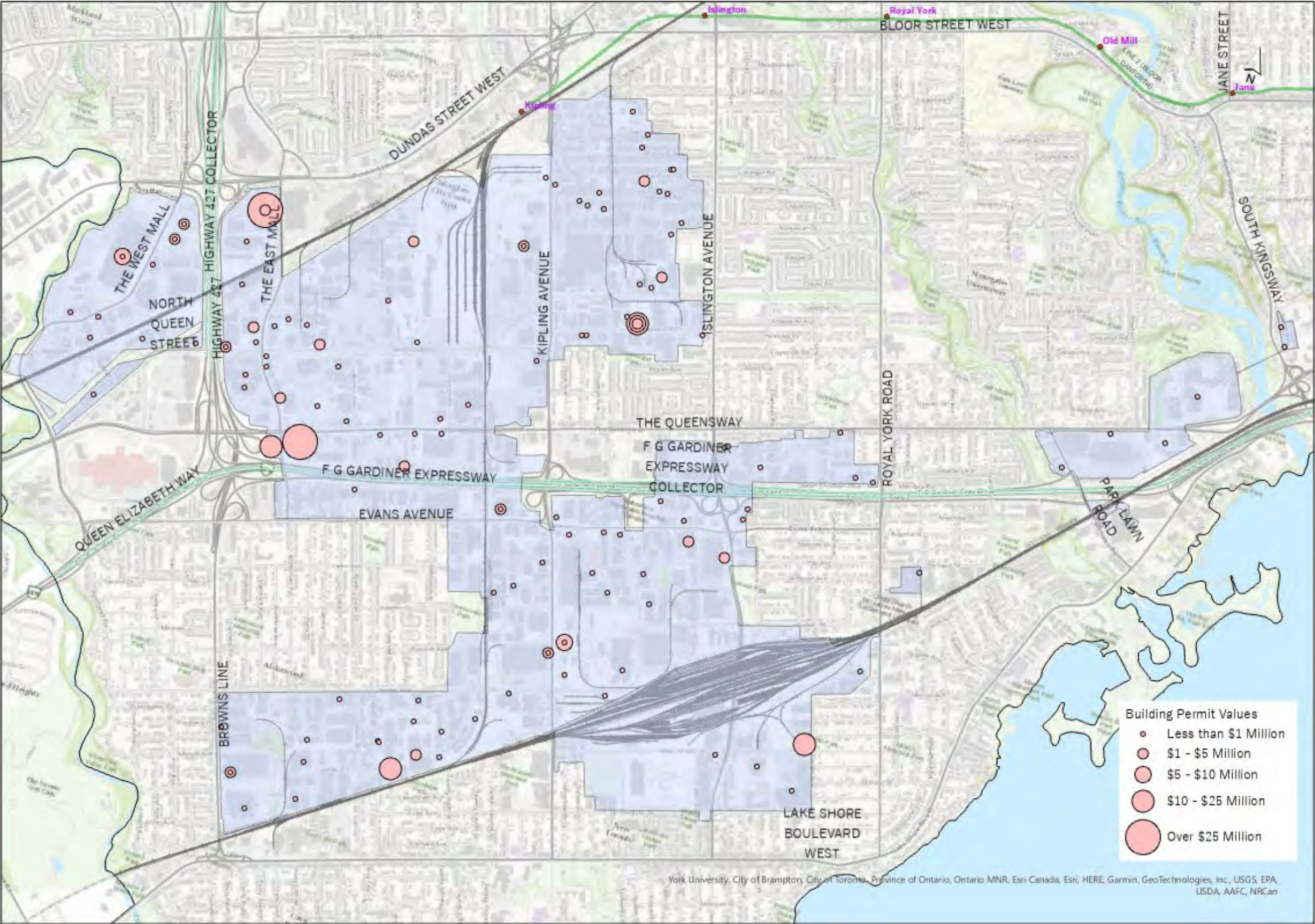


Total Employment by Size of Establishment, 2019

Source: City of Toronto Employment Survey



Value of Non-Residential Building Permits, 2016-2019 in South Etobicoke Area



Total Non-Residential Investment

(\$000s):	\$357,931
New Building:	\$167,159
Interior Alterations:	\$73,065
Additions:	\$25,445
Multiple Projects:	\$83,978
Demolition:	\$8,284

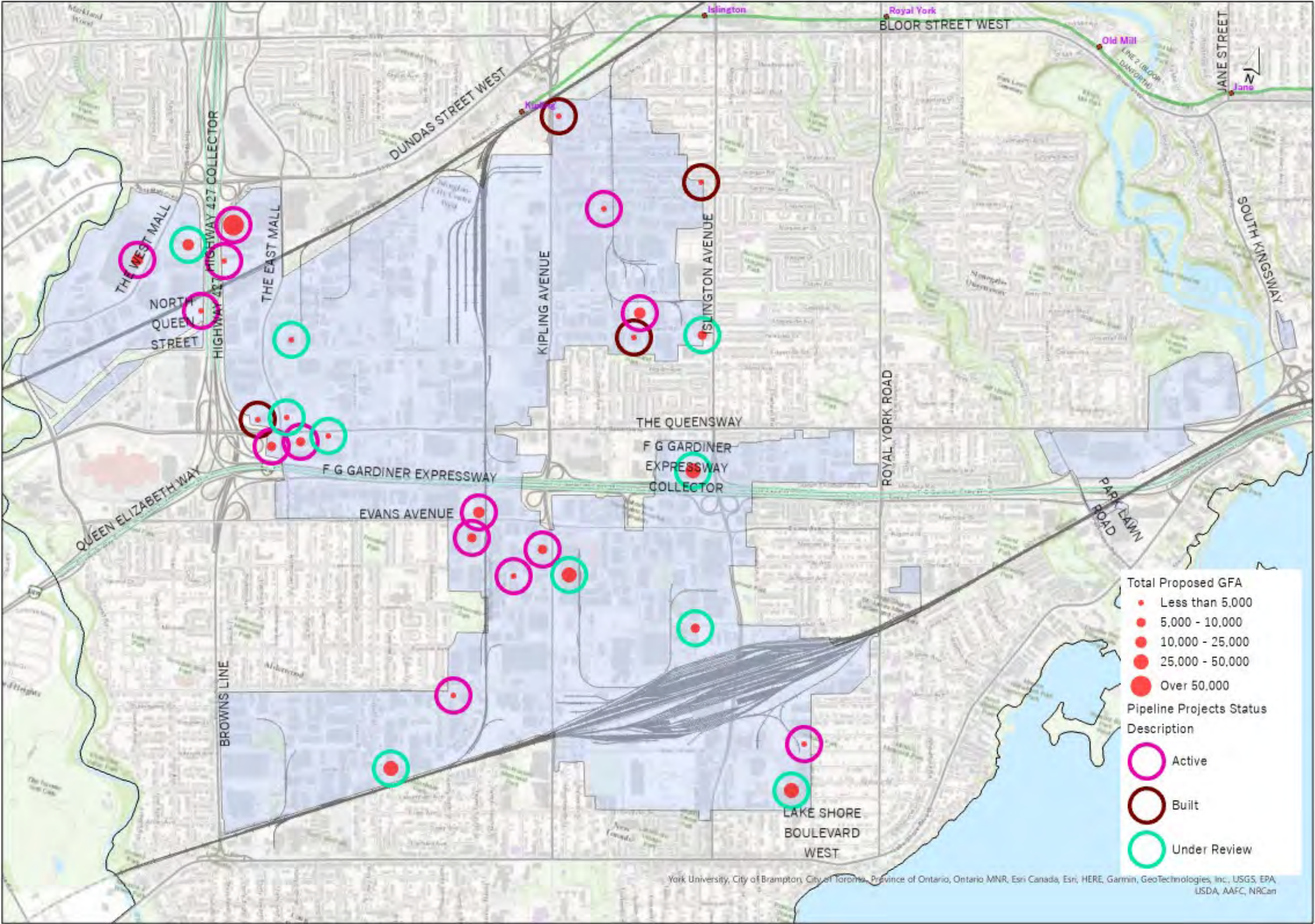
Value of Non-Residential Building Permits, 2016 – 2021

Source: City of Toronto, Building Permits





# Non-Residential Development Proposals by Status, Q2-2021



Total Non-Res GFA in Proposed Developments: 306,370 (sq. meters)

Active:	123,630
Under Review:	178,870
Built:	3,870

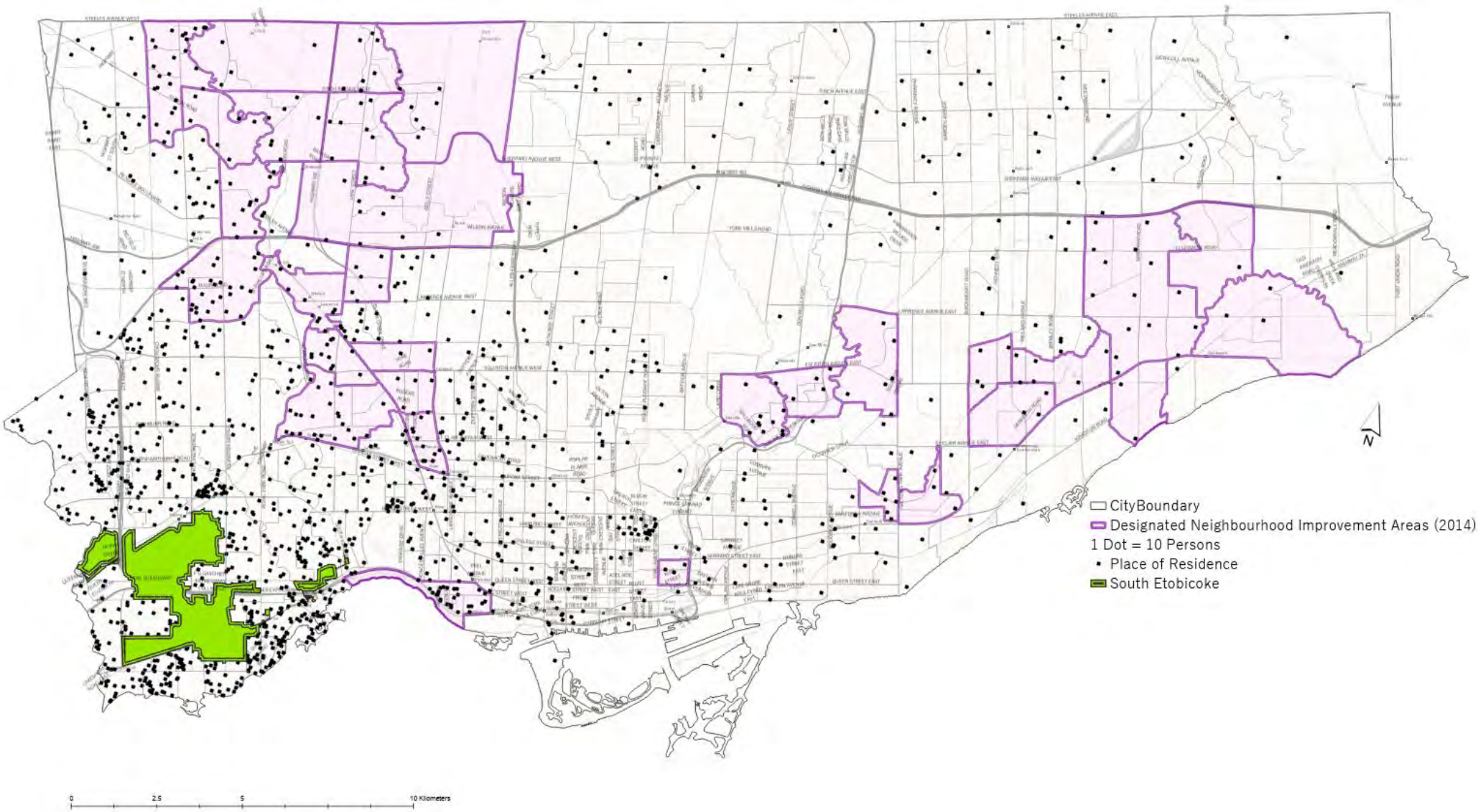
Non-Residential Development Proposals by Status

Source: City of Toronto Development Pipeline



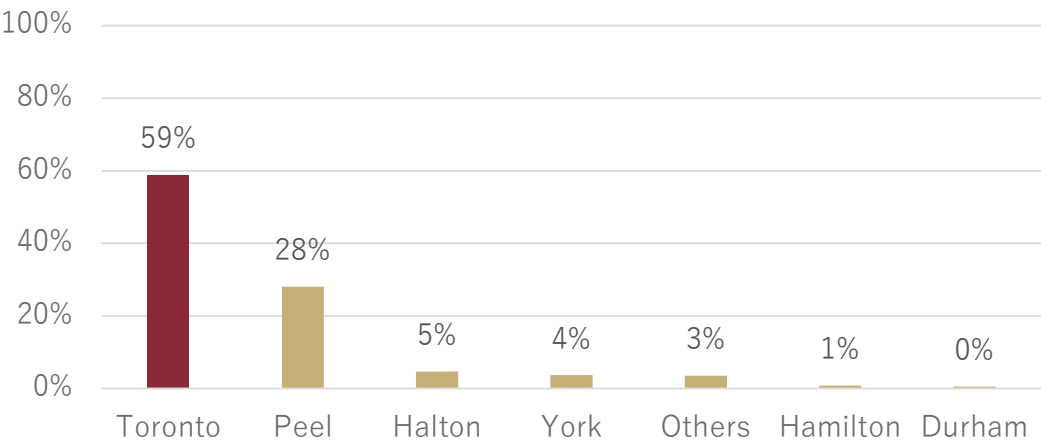


# Place of Residence for Workers in South Etobicoke Area

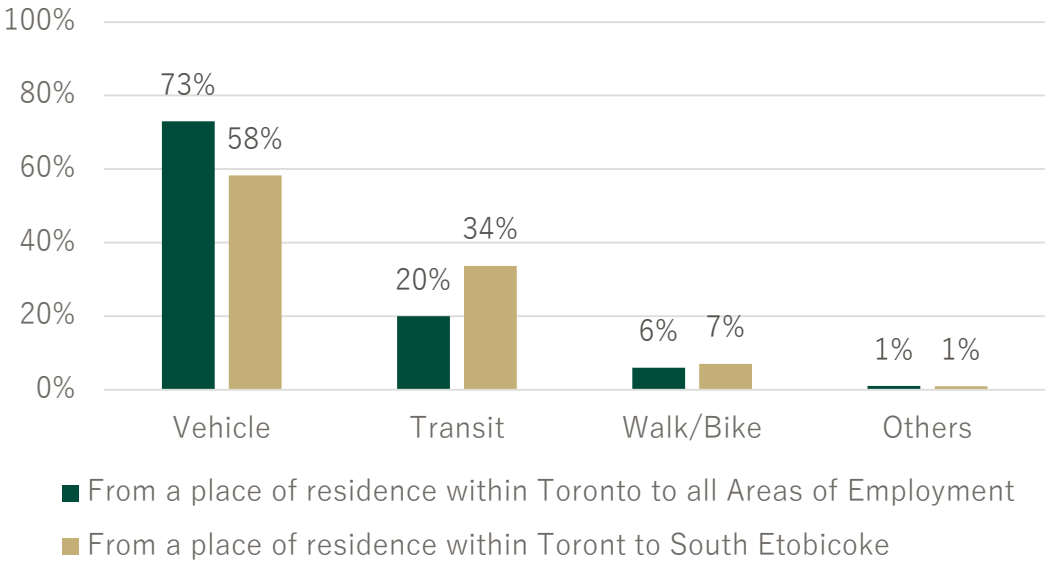


19% of the workforce share residing in Toronto live in Neighbourhood Improvement Areas.

Percent Distribution of Place of Residence



Mode of Transport of Commuters from Within Toronto to All Areas of Employment Compared to South Etobicoke



Source: Statistics Canada, Place of Work Status- 2016 Census





## **Profile 7**

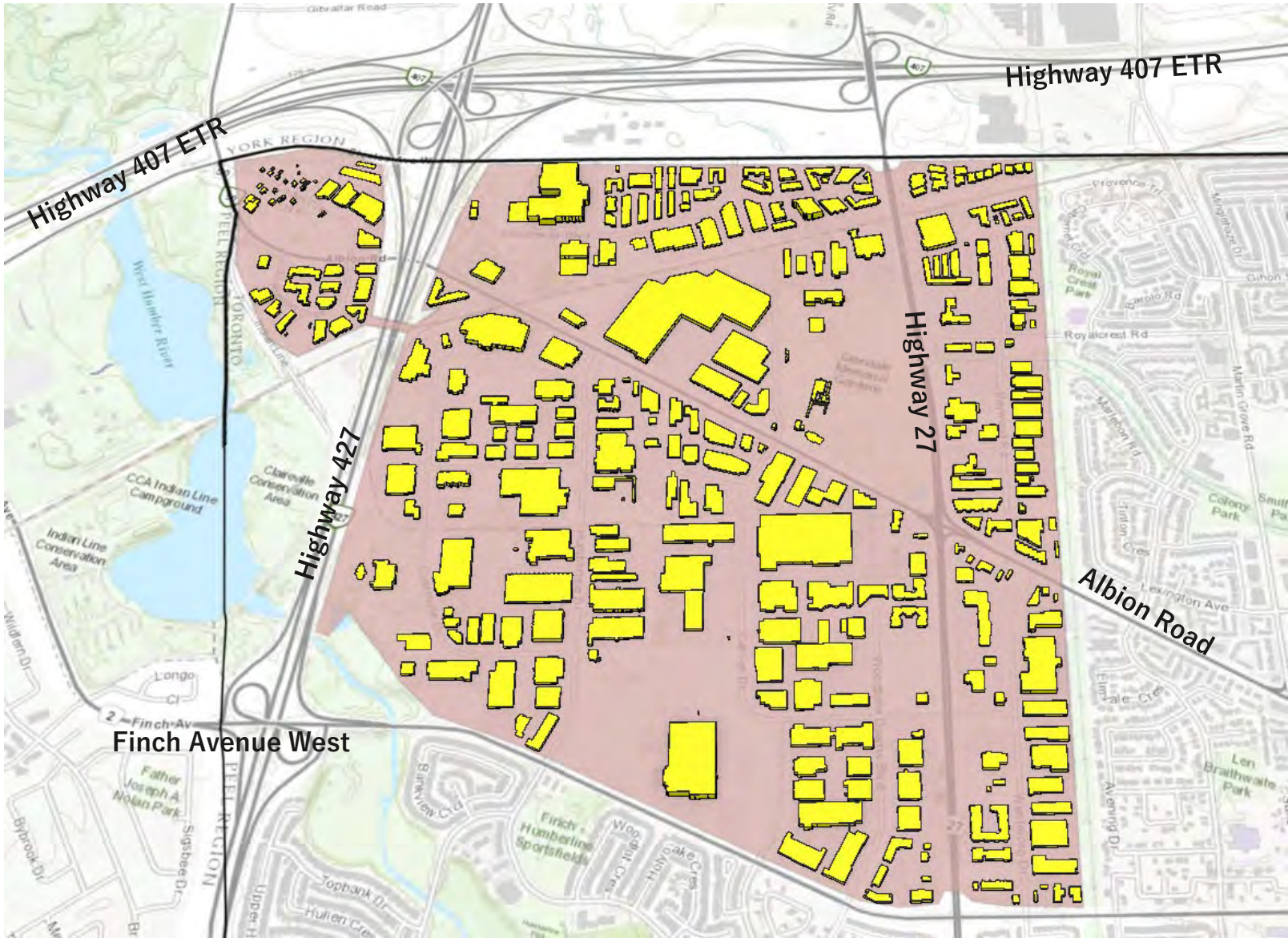
### **Northwest Etobicoke Area of Employment**



# Northwest Etobicoke Area of Employment

## Area Context:

The North West Etobicoke area of employment is located along the northwest border of Toronto with excellent accessibility to Highways 27, 427 and 407. It is bounded by Hwy. 427 to the west, Steeles Ave. to the north, Finch Ave. to the south, and, on the east, by a Hydro right of way east of Hwy. 27. There is a significant manufacturing presence along with warehousing and distribution uses.



Source: City of Toronto 3D Massing

### Top Employers:

- Apotex Inc.
- Give & Go Prepared Food Inc.
- Homelife Superstars Real Estate
- Deco Automotive Industries
- Century 21

### Key Facts:

Total Land Area (net ha)	197.1 ha
Total Employment	16,306
Total Establishments	926
Rentable Building Area (Industrial)**	12.5 Million Square Feet
Vacancy Rate(2021)	0.7%
Employment Density (Net Jobs/ ha)	110.4

\*\* Source: CoStar Group, [www.costar.com](http://www.costar.com)



Key Map

## Function & Focus

- Total employment was 16,300 in 2019, resulting from growth of over 400 since 2016, following an increase of 2,700 during the previous five years: a 24% increase since 2011.
- Jobs are concentrated in Manufacturing (40%) and Transportation, Warehousing & Wholesale Trade (15%); 8% of all the manufacturing jobs across the City are found here.
- There has been a notable increase in Professional, Scientific & Technical Services since 2011. The almost-doubling of the number of establishments in these industries has resulted in sector employment growing from 410 to 1120 over this period.
- Employment density is 110 jobs per hectare over the 197 hectares of employment land.
- There has been investment in industrial and commercial construction of over \$427 million over the past five years.
- Currently, there is 63,000 square metres of new non-residential space in planning stages.
- With 12.5 million square feet of industrial building area, the vacancy rate is below 1%.
- Of the 39% of workers in Northwest Etobicoke who live within the City of Toronto (6,390), 35% chose a low-carbon mode of travel to work: 31% use transit, while 4% walk or bicycle.
- Fully 41% reside in Neighbourhood Improvement Areas.

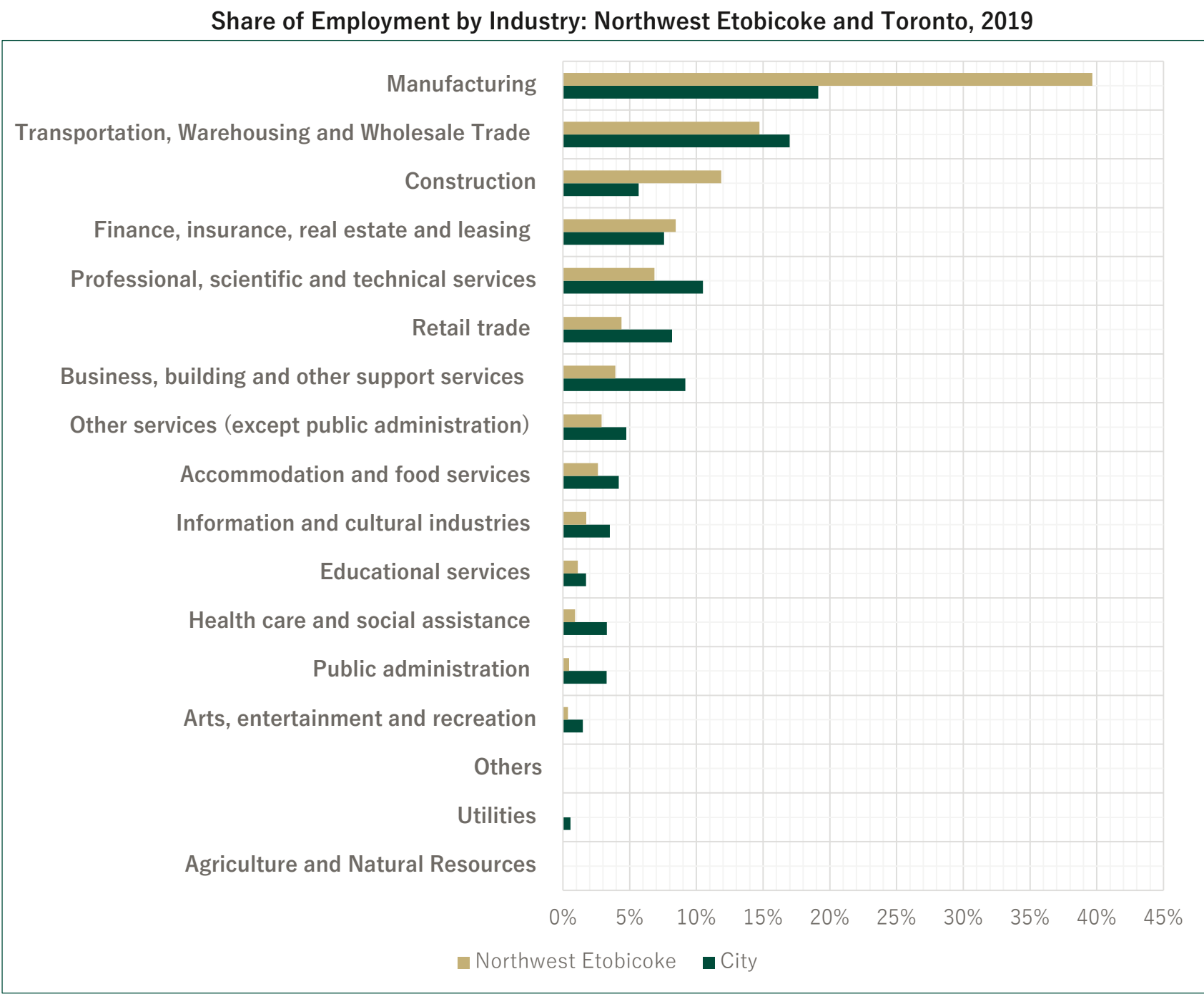
## Outlook

- Labour-intensive businesses are attracted to this area.
- Land use conversion pressure is not being experienced in this well-established cluster of businesses.





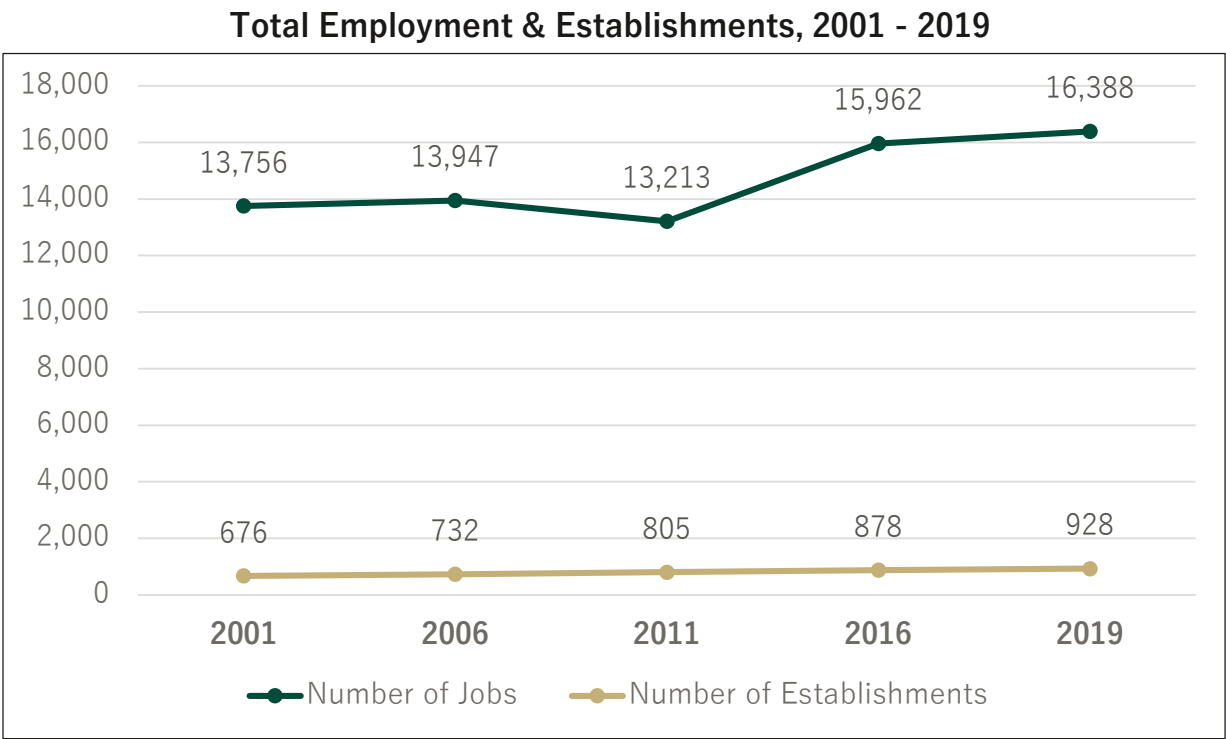
Share of Employment by Industry: Northwest Etobicoke and Toronto, 2019



Source: City of Toronto Employment Survey, 2019

NAICS Categories	Number of Jobs
Manufacturing	6,470
Transportation, Warehousing and Wholesale Trade	2,400
Construction	1,940
Finance, insurance, real estate and leasing	1,380
Professional, scientific and technical services	1,120
Retail trade	720
Business, building and other support services	640
Other services (except public administration)	470
Accommodation and food services	430
Information and cultural industries	290
Educational services	180
Health care and social assistance	150
Public administration	80
Arts, entertainment and recreation	60
Agriculture and Natural Resources	0
Utilities	0
Others	0
Total	16,310

Source: City of Toronto Employment Survey, 2019



Source: City of Toronto Employment Survey, 2019

Toronto Employment Survey data is confidential and has been provided solely for the purpose of this Study. Aggregated information is available in the [TES Bulletin](#) or on request from City of Toronto Planning, Planning Research and Analytics.





Total Employment by Industry (NAICS), 2019

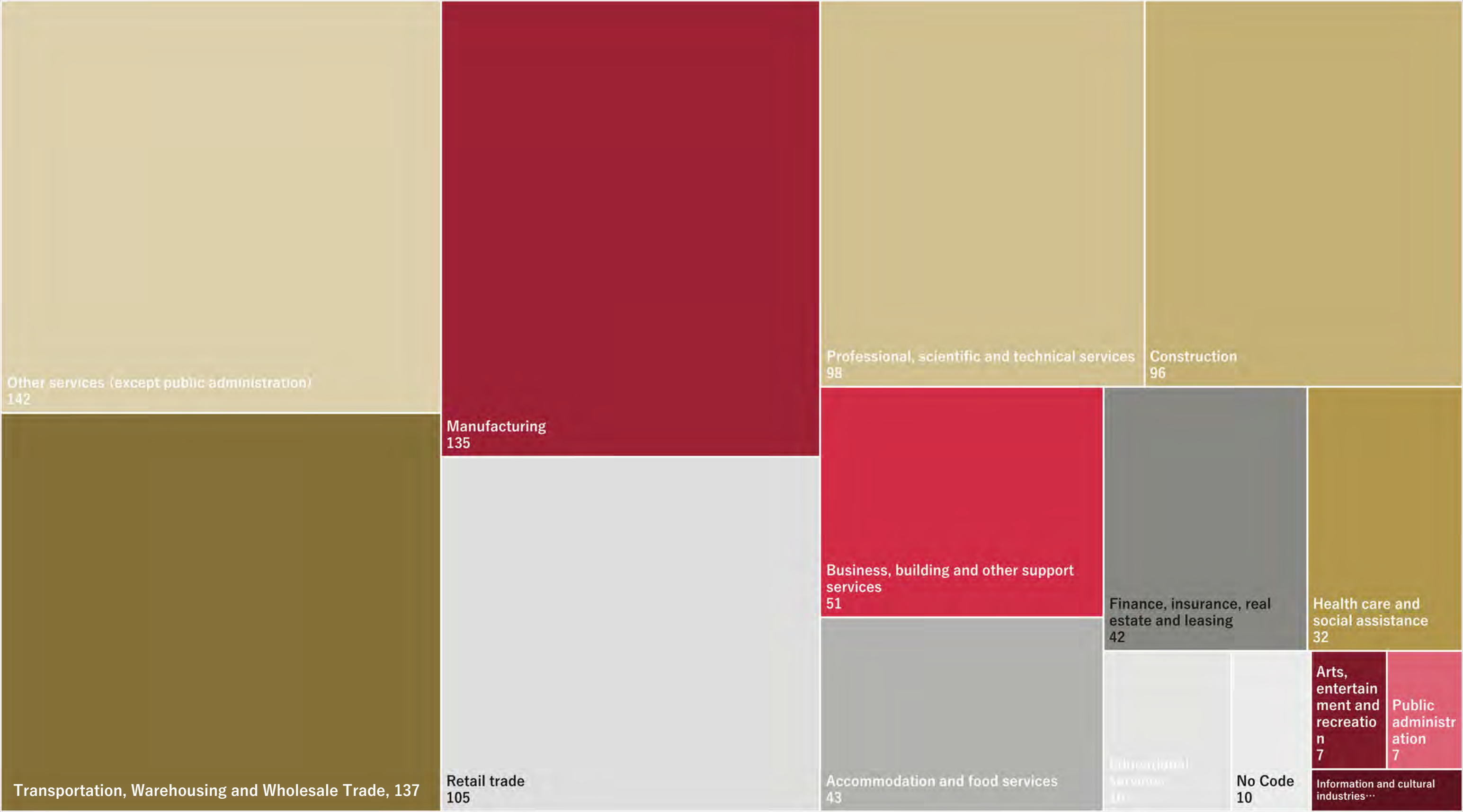


\*NAICS: “North American Industry Classification System, v 3.0 2017  
Source: Toronto Employment Survey, 2019





Total Establishments by Industry (NAICS), 2019

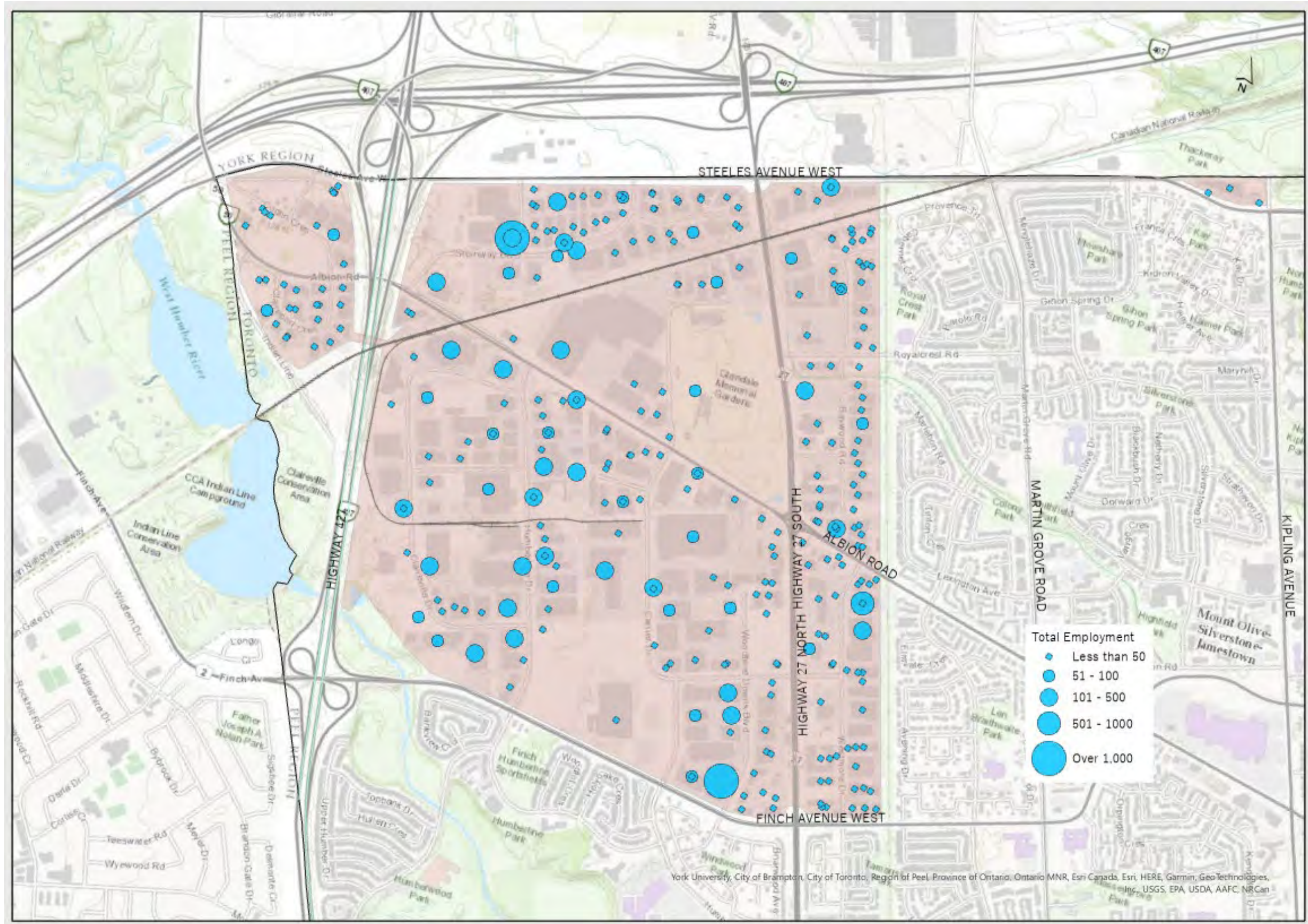


\*NAICS: "North American Industry Classification System, v 3.0 2017

Source: Toronto Employment Survey, 2019



# Employment and Establishments in Northwest Etobicoke Area of Employment

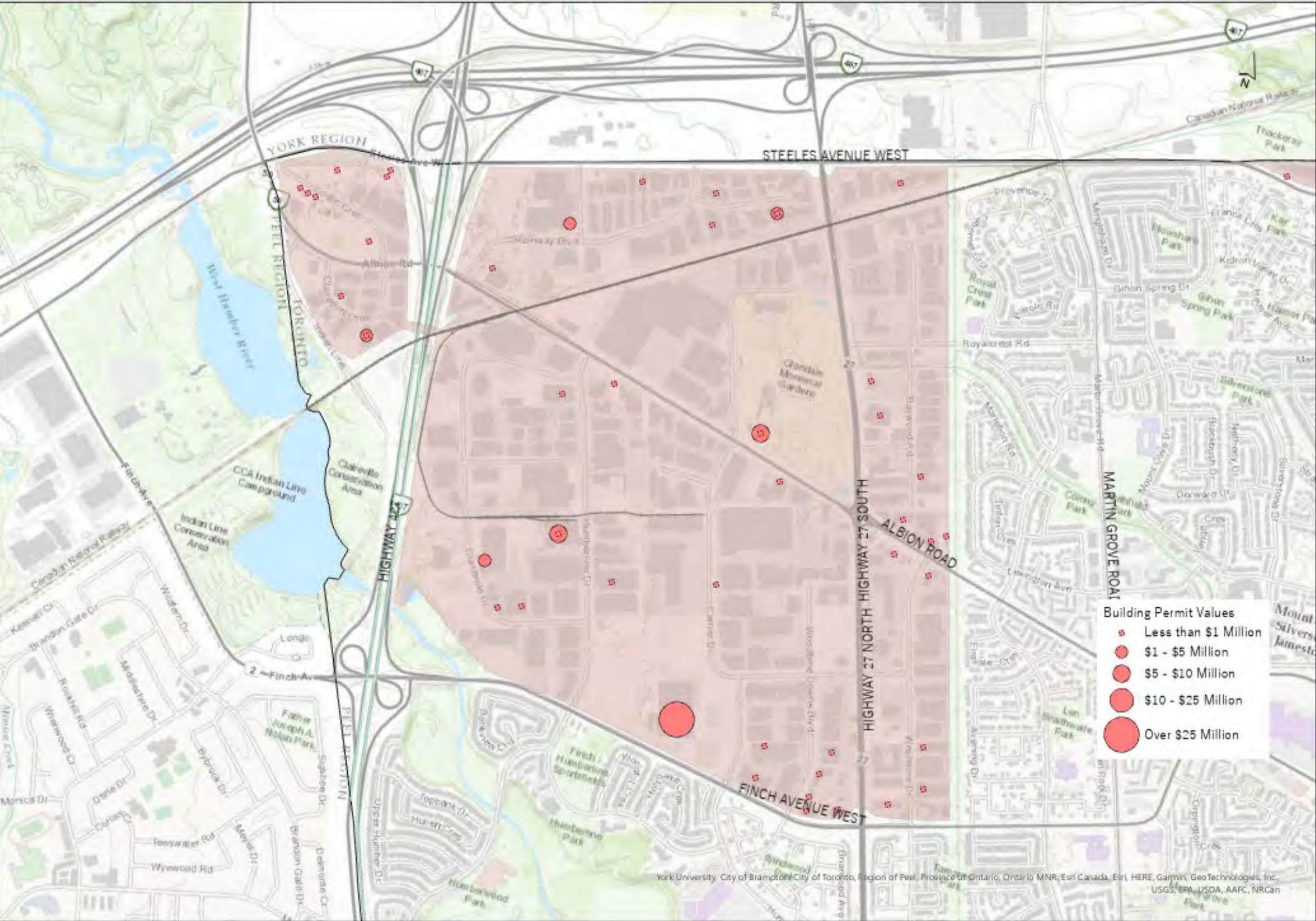


Total Employment by Size of Establishment, 2019

Source: City of Toronto Employment Survey



Value of Non-Residential Building Permits, 2016-2019 in Northwest Etobicoke Area of Employment



Total Value of Non-Residential Building Permits, 2016-2019 (\$ ,000s)		\$427,398
New Buildings		\$336,682
Interior Alterations		\$58,870
Additions		\$10,105
Multiple Projects		\$21,690
Demolition		\$50

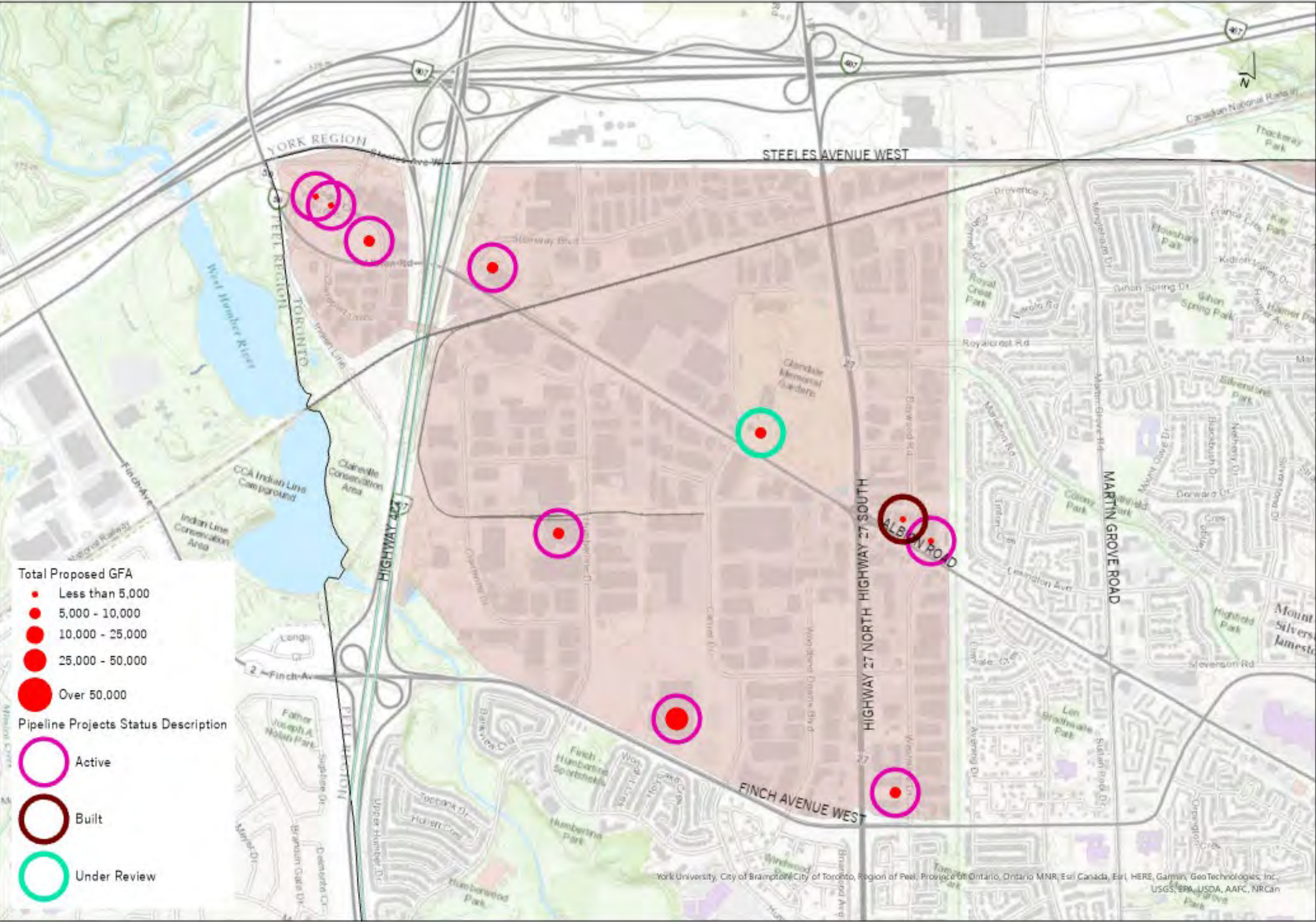
Value of Non-Residential Building Permits, 2016 – 2021

Source: City of Toronto, Building Permits





Non-Residential Development Proposals by Status, Q2-2021



Total Non-Residential GFA in Proposed Developments: 69,940 (Square Meters)

Active	60,430
Built	7,330
Under Review	2,180

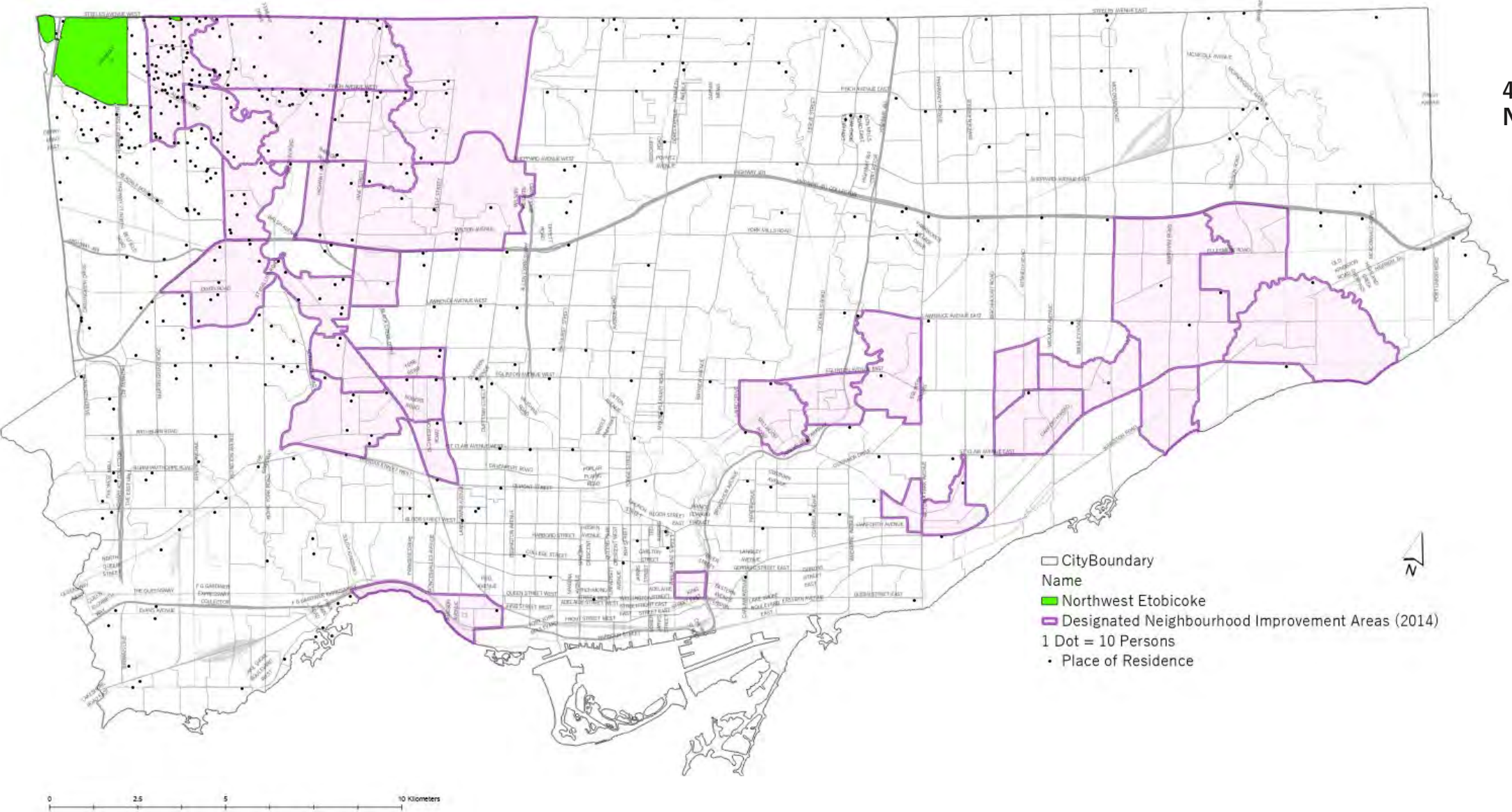
Non-Residential Development Proposals by Status

Source: City of Toronto Development Pipeline



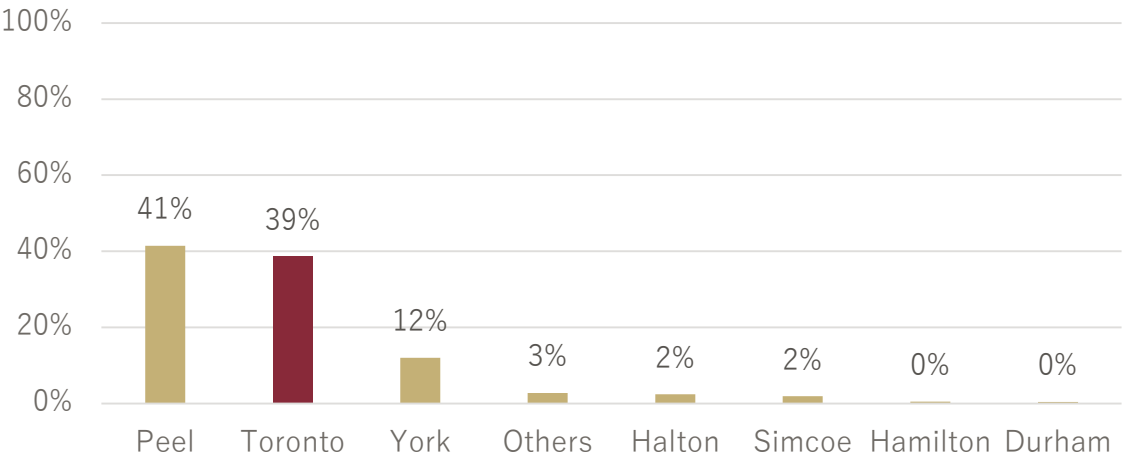


# Place of Residence for Workers in Northwest Etobicoke Area of Employment

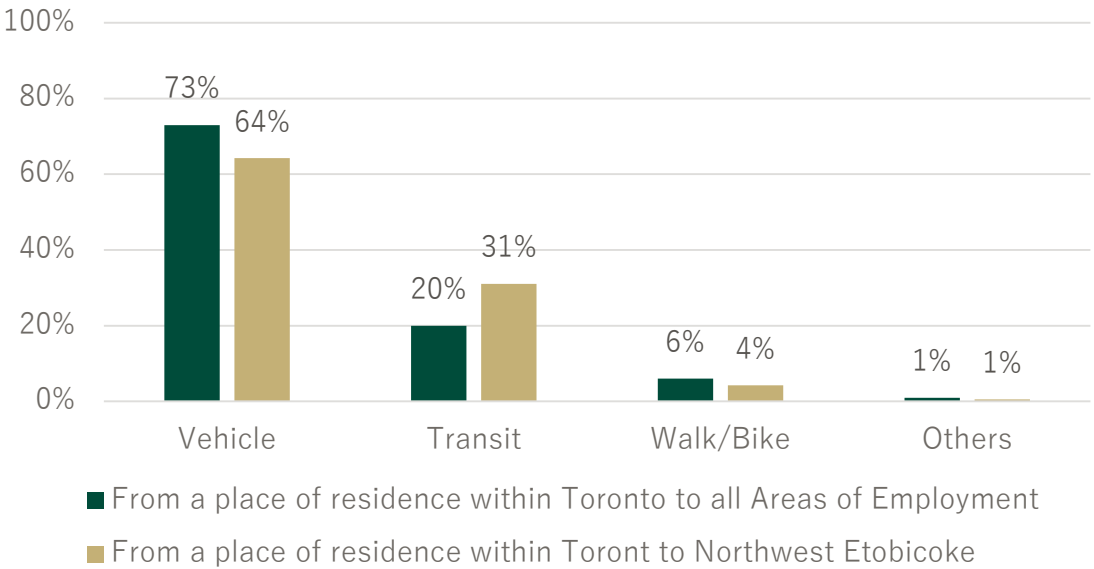


41% of the workforce share residing in Toronto live in Neighbourhood Improvement Areas.

Percent Distribution of Place of Residence



Mode of Transport of Commuters from Within Toronto to All Areas of Employment Compared to North Etobicoke



Source: Statistics Canada, Place of Work Status- 2016 Census

