

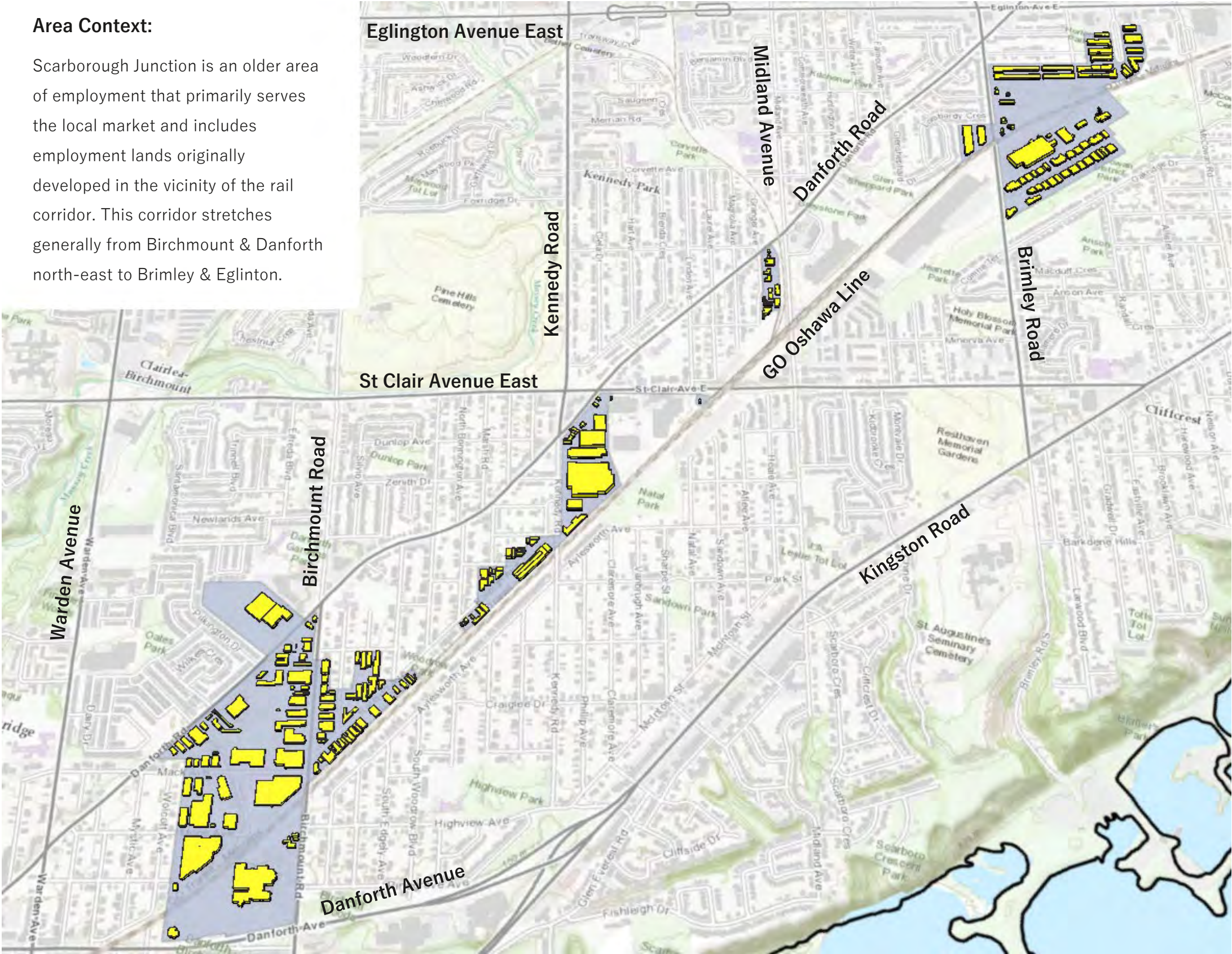
Profile 16

Scarborough Junction Area of Employment

Scarborough Junction Area of Employment

Area Context:

Scarborough Junction is an older area of employment that primarily serves the local market and includes employment lands originally developed in the vicinity of the rail corridor. This corridor stretches generally from Birchmount & Danforth north-east to Brimley & Eglinton.



Key Map

Key Facts:

Total Land Area (Net Ha)	75.1 ha
Total Employment	3,231
Total Establishments	234
Rentable Building Area**(Industrial)	2.66 million sft.
Vacancy Rate(2021)	0.9 %
Employment Density (Net jobs/ha)	43.0
** Source: CoStar Group, www.costar.com	

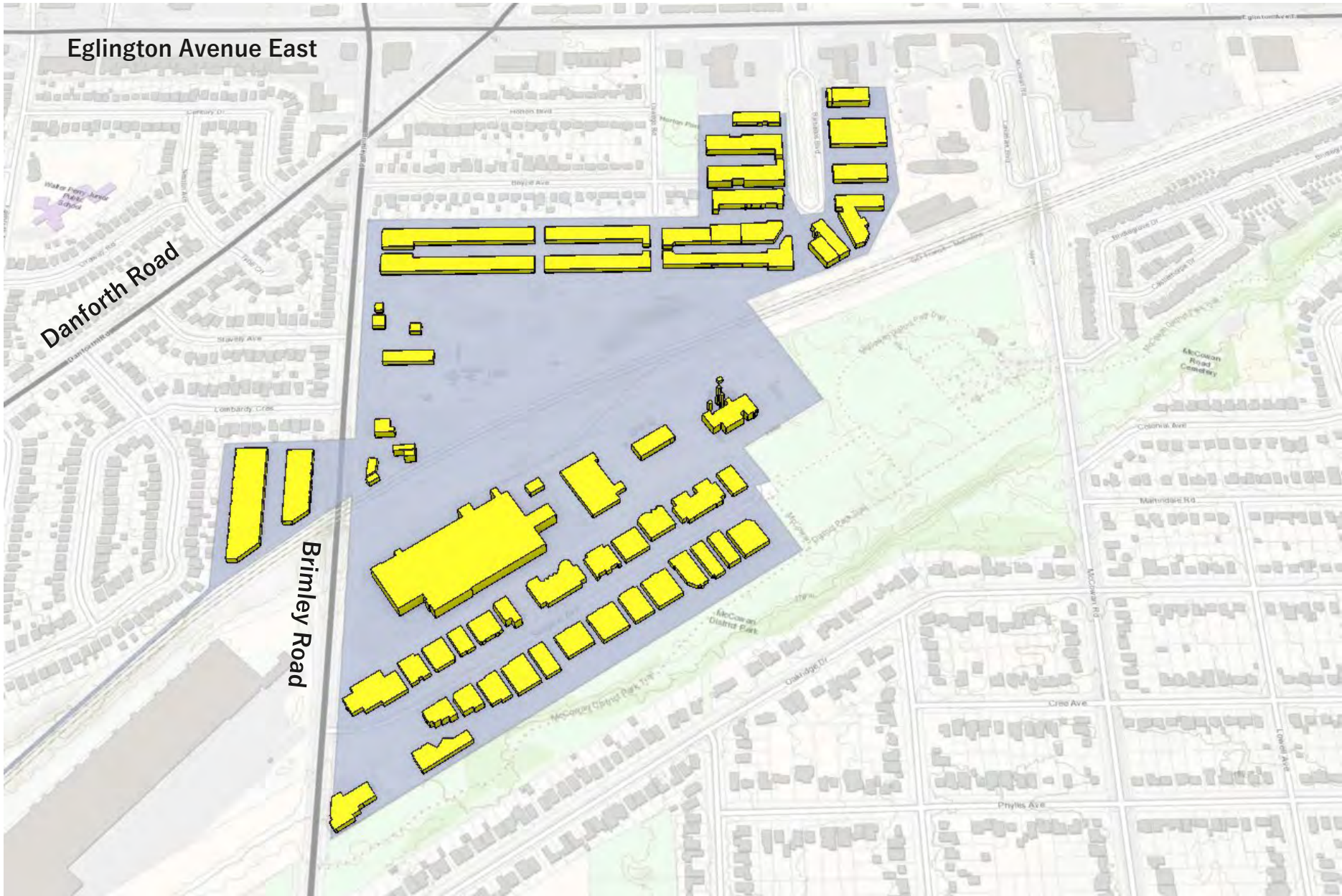
Top Employers:

- Toronto Transit Commission
- Tubular Steel Inc.
- Divine Furniture Rental
- Elizabeth Grant Inc.
- City of Toronto

Source: City of Toronto 3D Massing



Scarborough Junction Area North



Source: City of Toronto 3D Massing

Function & Focus

- Total employment here of 3,200 is significantly below (2,300 jobs) the total observed in 2001. There has, however, been a marginal increase of 300 jobs since 2011, while the area has maintained its focus on Transportation, Warehousing & Wholesale Trade (49%), Manufacturing (14%) and Construction (8%).
- The employment density here is estimated at about 43 jobs per hectare over the 75 hectares of employment land.
- \$129 million was invested in construction and alterations of industrial / commercial projects over the past five years, and there is 134,000 square metres of new development in the pipeline.
- Of the 81% of workers in this area who live within the City of Toronto, 39% chose a low-carbon mode of travel to work: 31% use transit, while 8% walk or bicycle.
- 34% of these workers reside in Neighbourhood Improvement Areas.

Outlook

- The locational attributes of this area of employment may be considered inferior to businesses requiring access to regional customers and/or separation from sensitive uses because of its distance from highway infrastructure and the encroachment of residential uses over time.
- The linear orientation of this area makes it more susceptible to land use conversion pressure, which has been observed on select sites.

Scarborough Junction Area Central



Source: City of Toronto 3D Massing

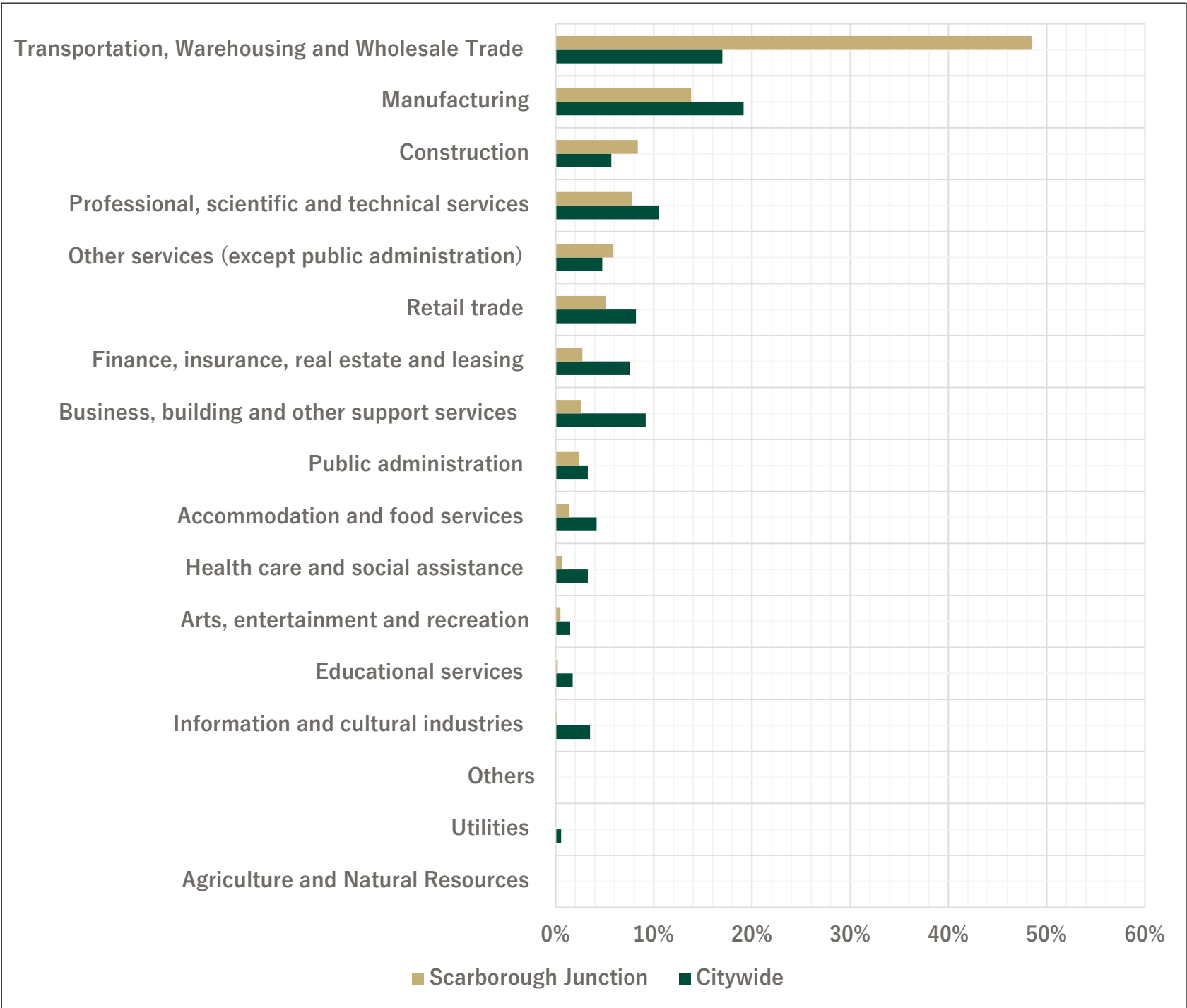
Scarborough Junction Area South-West



Source: City of Toronto 3D Massing

Share of Employment by Industry: Scarborough Junction and Toronto, 2019

Share of Employment by Industry: Scarborough Junction and Toronto, 2019

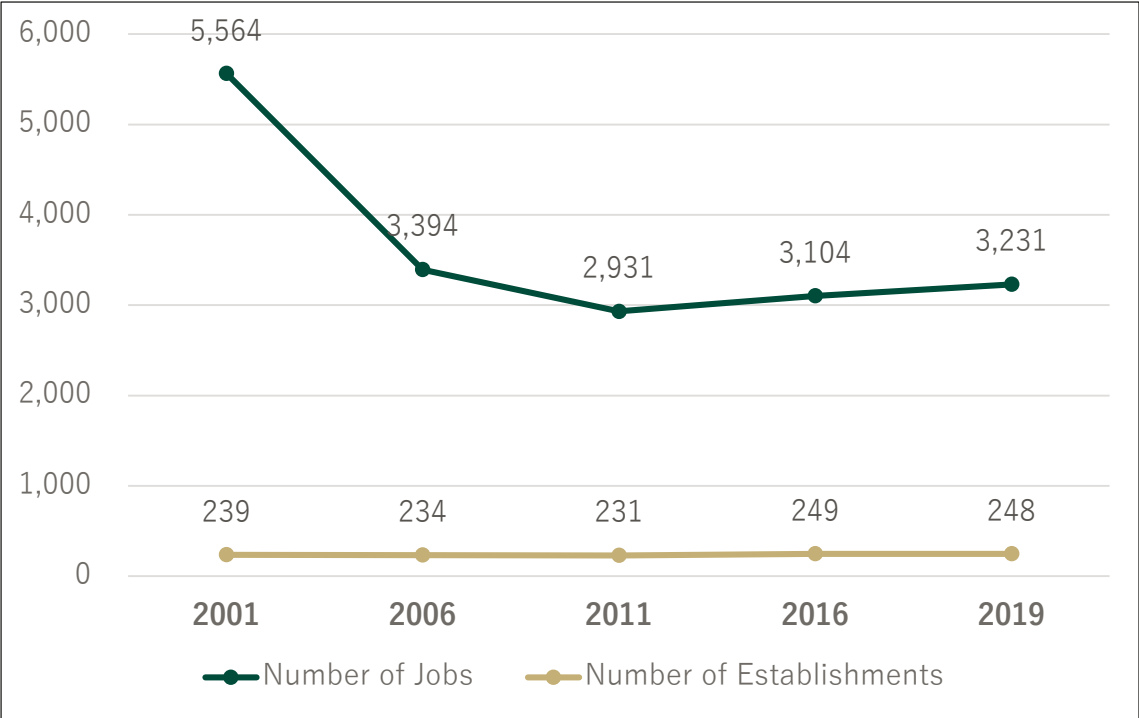


Source: City of Toronto Employment Survey, 2019

NAICS Categories	Number of Jobs
Transportation, Warehousing and Wholesale Trade	1,570
Manufacturing	450
Construction	270
Professional, scientific and technical services	250
Other services (except public administration)	190
Retail trade	170
Finance, insurance, real estate and leasing	90
Business, building and other support services	90
Public administration	80
Accommodation and food services	50
Health care and social assistance	20
Arts, entertainment and recreation	20
Educational services	10
Information and cultural industries	0
Agriculture and Natural Resources	0
Utilities	0
Others	0
Total	3,230

Source: City of Toronto Employment Survey, 2019

Total Employment & Establishments, 2001 - 2019

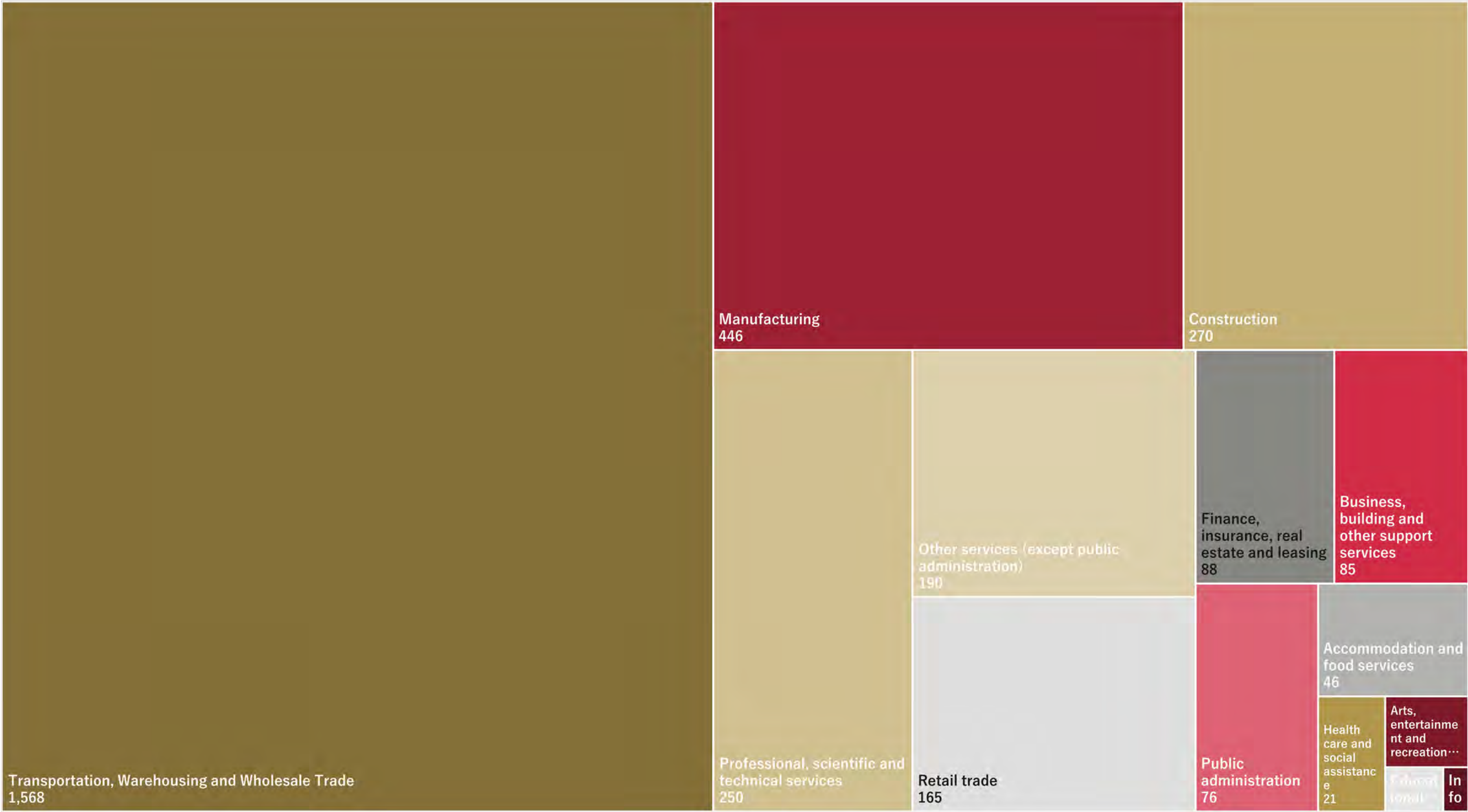


Source: City of Toronto Employment Survey, 2001-2019

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:

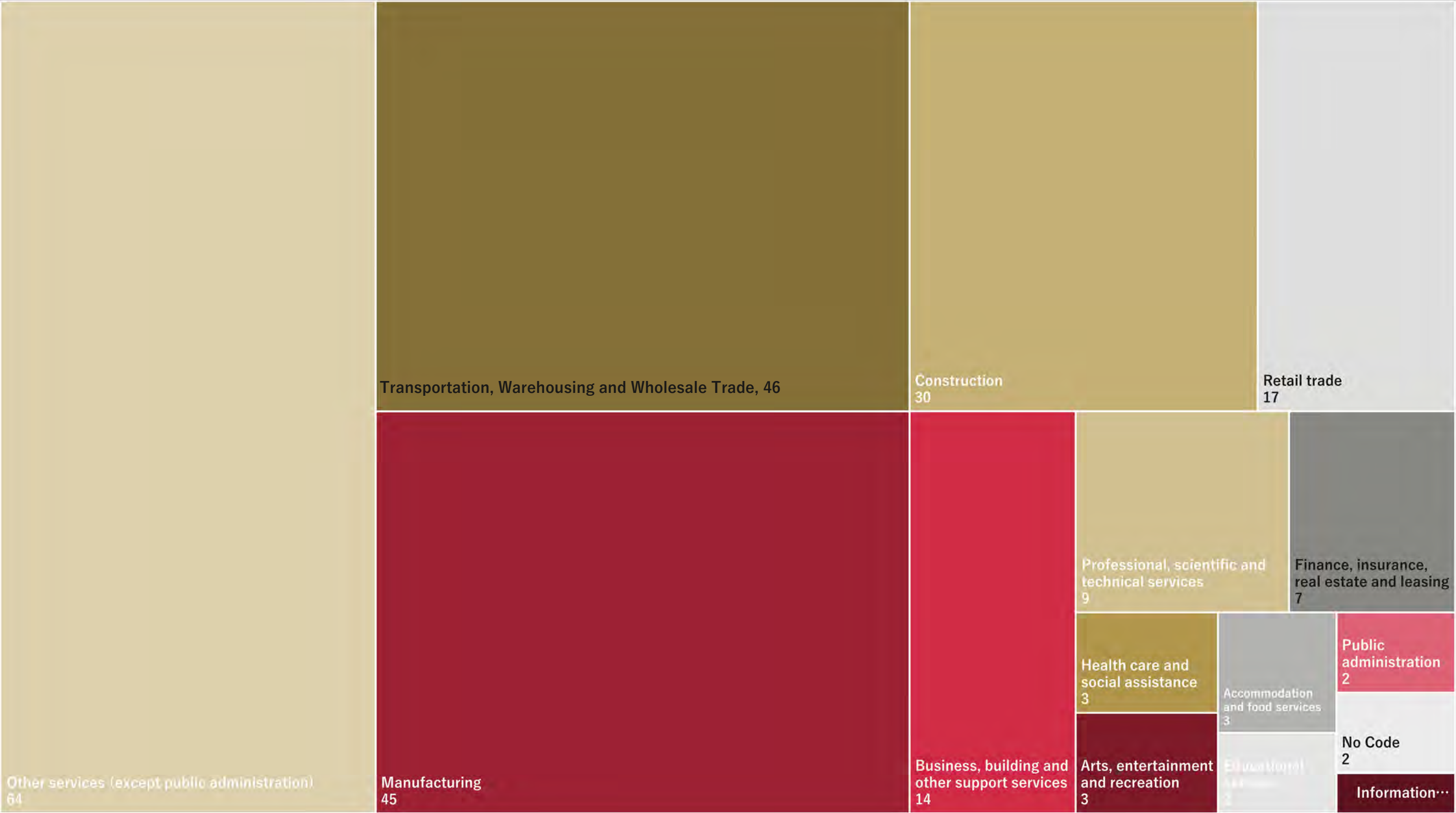


*NAICS: "North American Industry Classification System, v 3.0 2017

Source: Toronto Employment Survey, 2019



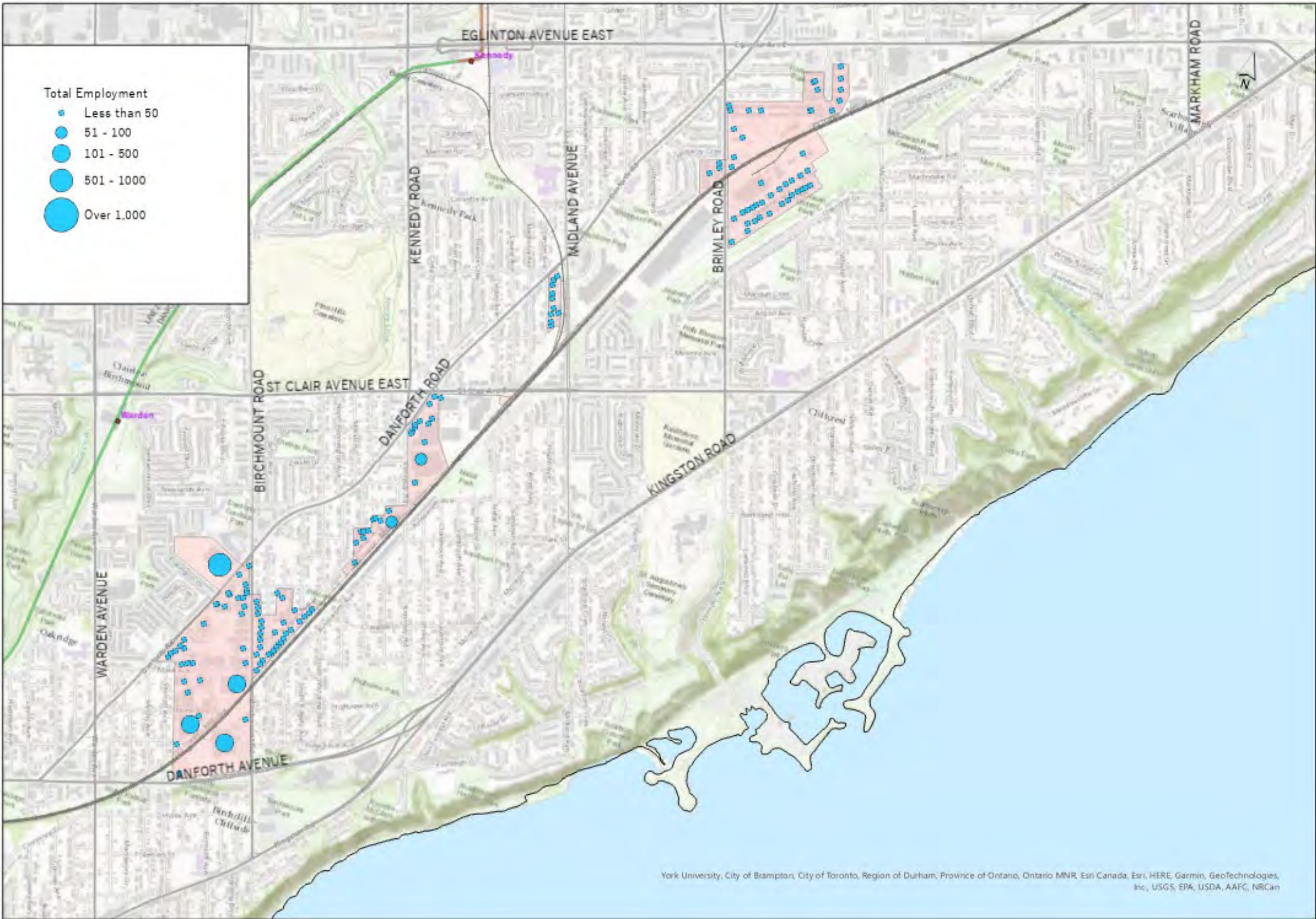
Total Establishments by Industry (NAICS), 2019



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

Source: Toronto Employment Survey, 2019

Employment and Establishments in Scarborough Junction Area

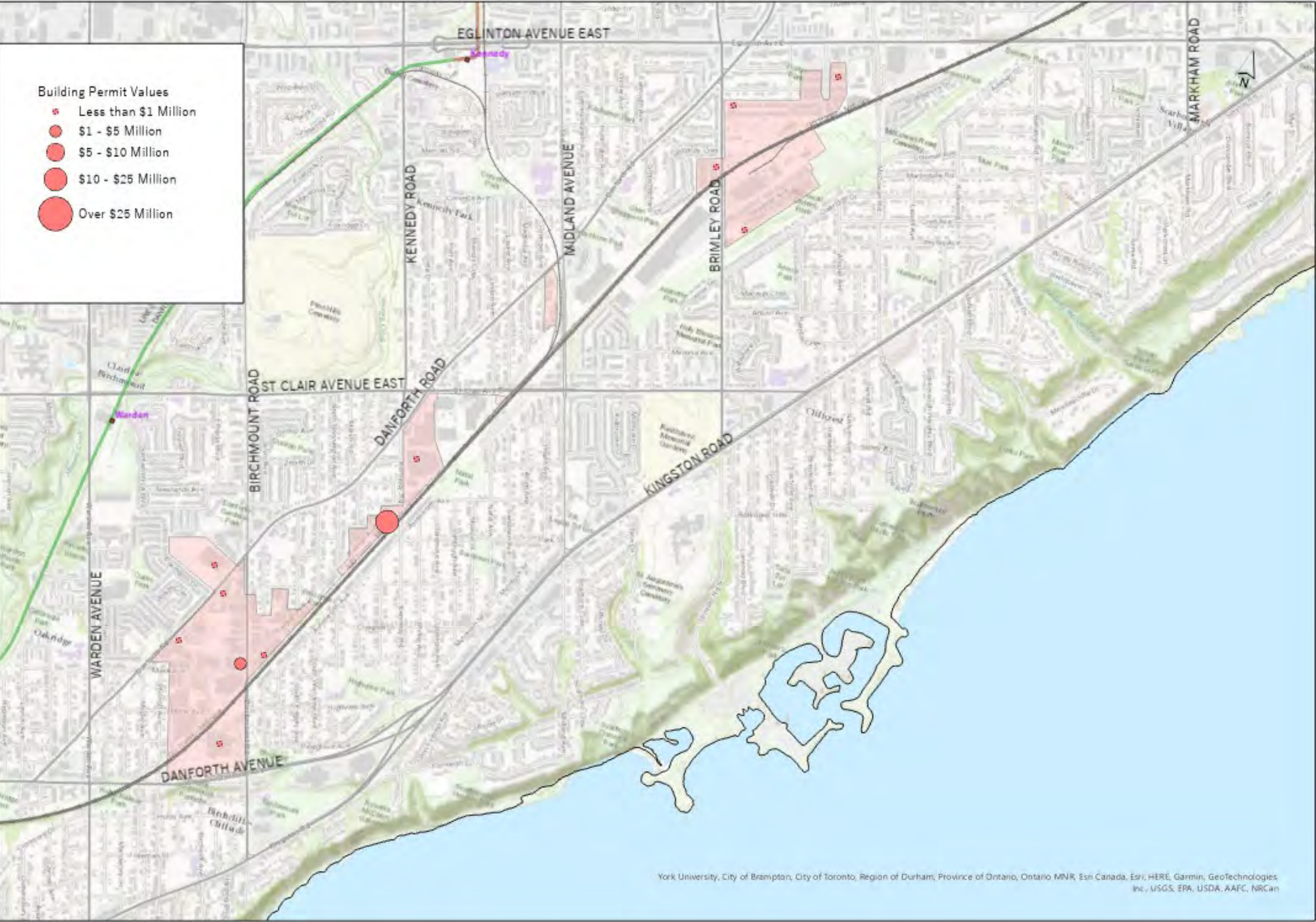


Total Employment by Size of Establishment, 2019

Source: City of Toronto Employment Survey



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



Total Non-Residential Investment

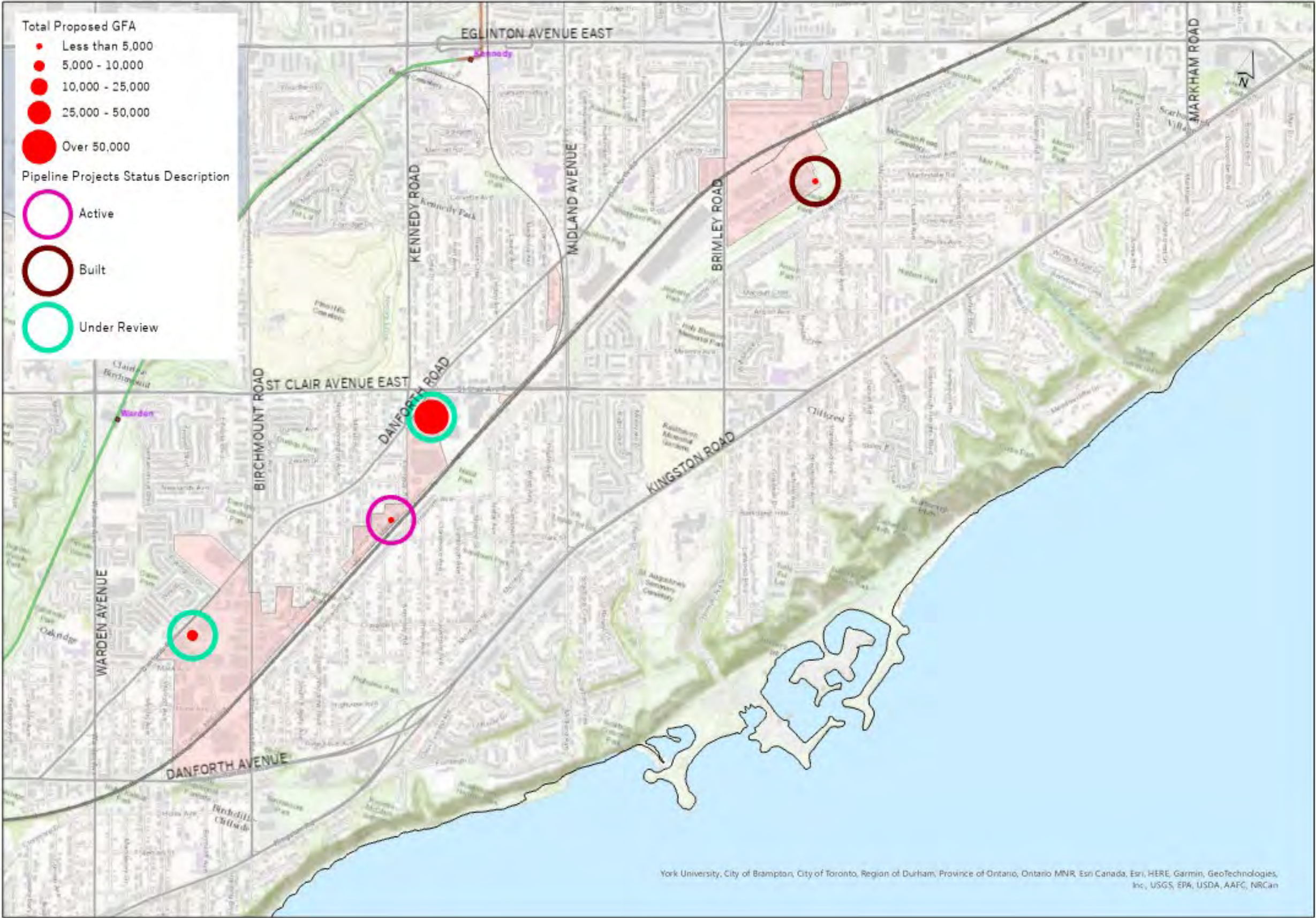
(\$000s):	\$129,025
New Building:	\$8,250
Interior Alterations:	\$8,505
Additions:	\$1,150
Multiple Projects:	\$111,120
Demolition:	\$0

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:
134,800 (sq. meters)

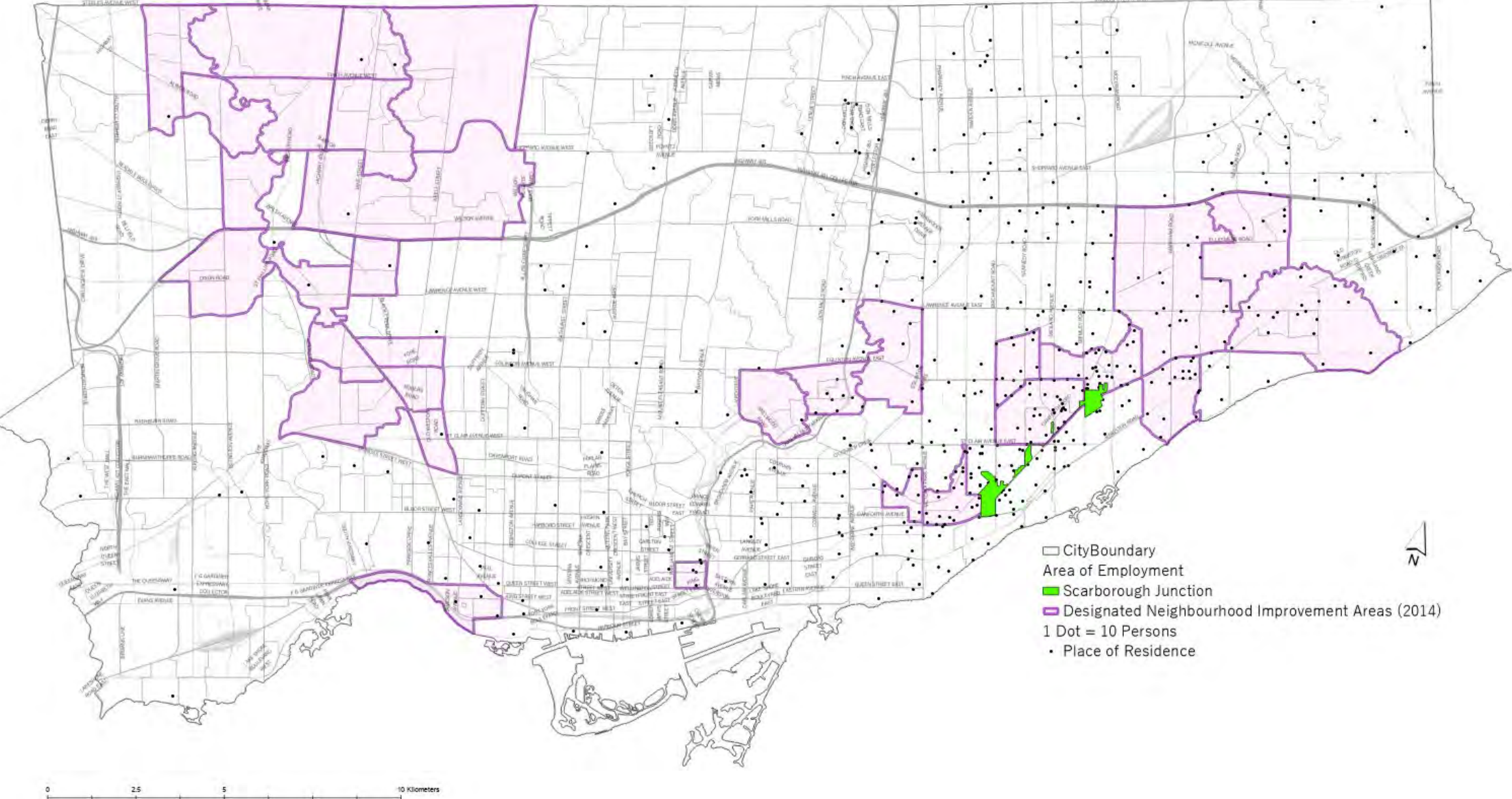
Active:	3,000
Built:	300
Under Review:	131,500

Non-Residential Development Proposals by Status

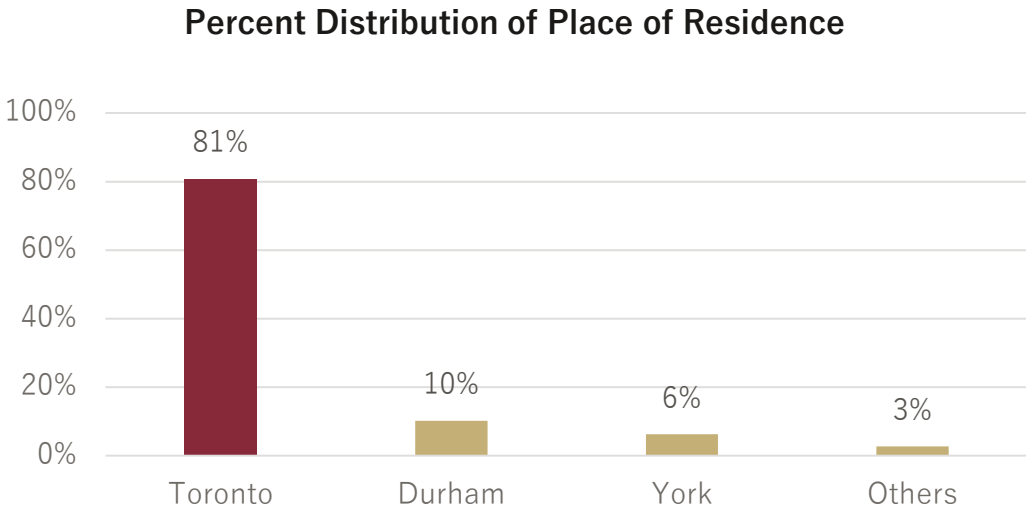
Source: City of Toronto Development Pipeline



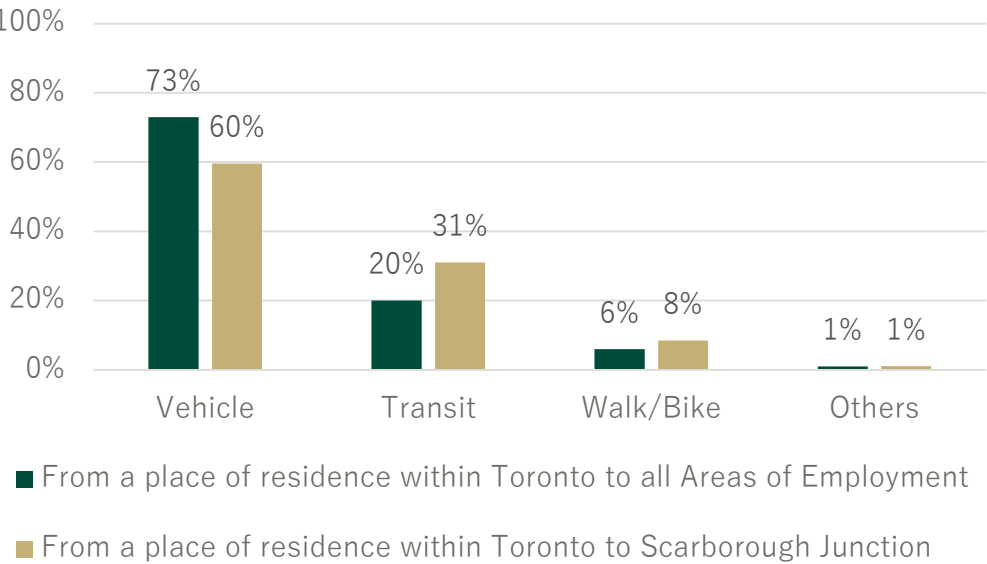
Place of Residence for Workers in Scarborough Junction Area of Employment



34% of the workforce share residing in Toronto live in Neighbourhood Improvement Areas.



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



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



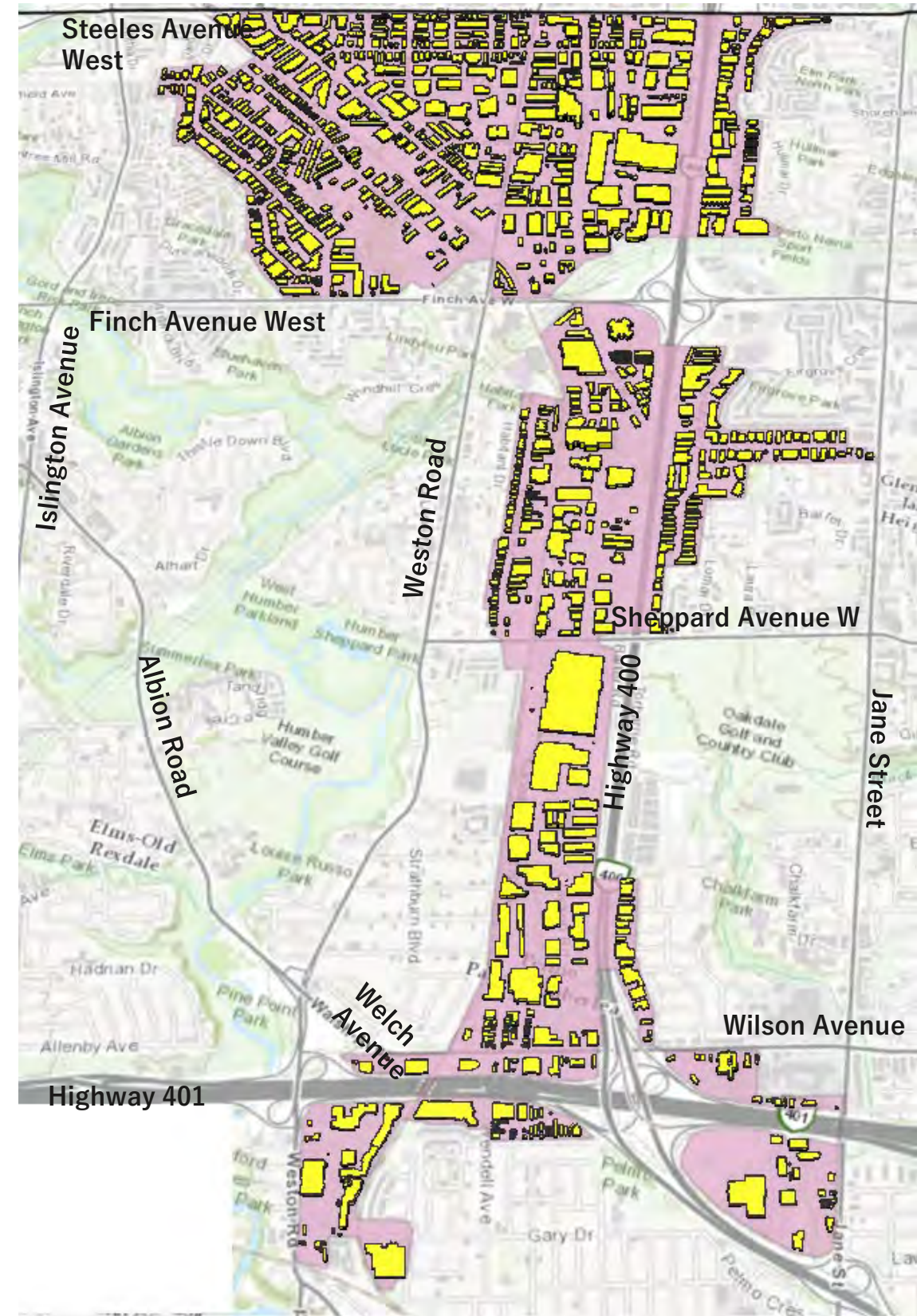
Profile 17

Highway 400 Area of Employment

Highway 400 Area of Employment

Area Context:

Straddling Highway 400 from Highway 401 north to Steeles Ave. W., this is a diverse employment area with a variety of manufacturing uses along with many large distribution centres, attracted to this corridor due to its excellent highway access.



Source: City of Toronto 3D Massing

Function & Focus

- With 34,400 total jobs, employment has been fairly stable since 2001, although the number of businesses has grown by 15%.
- Dominant sectors are Manufacturing (34%), Transportation, Warehousing & Wholesale Trade (21%) and Construction (10%); a profile that has been consistent since 2011.
- 14% of all Toronto employment area jobs in Manufacturing are found here, along with 14% of all Construction jobs and 10% of all Transportation jobs.
- The employment density here is estimated at about 48 jobs per hectare over the 716 hectares of employment land.
- It is estimated that the 27 million sq. ft. of industrial space is essentially fully occupied with less than 1% vacancy.
- \$421 million was invested in construction and alterations of industrial / commercial projects over the past five years, and there is over 126,000 square metres of new development in the pipeline.
- Of the 53% of workers in the Highway 400 area who live within the City of Toronto, 35% chose a low-carbon mode of travel to work: 30% use transit, while 5% walk or bicycle.
- 45% of these workers reside in Neighbourhood Improvement Areas.

Outlook

- The attributes of sites in this area ensure continued appeal for new businesses across a range of employment uses.
- There is excellent access to labour and facilitates goods movement. The completion of the Finch West LRT will improve access workers.
- The OLT has issued an Interim Order to convert lands at 8 Oak Street to a designation permitting residential uses near to Weston Road and Highway 401. Adjacent land owners are seeking similar permissions.
- Other land use conversion pressure is not identified as a significant concern for this well-established and thriving area. A recent example is of an older (functionally obsolete) facility that was demolished to allow for modern warehousing/distribution buildings.



Key Map

Key Facts:

Total Land Area (Net Ha)	716.4 ha
Total Employment	34,380
Total Establishments	2,166
Rentable Building Area**(Industrial)	27.0 million sft.
Vacancy Rate(2021)	0.7 %
Employment Density (Net jobs/ha)	47.9

** Source: CoStar Group, www.costar.com

Top Employers:

- FGF Brands Inc.
- Apotex Inc.
- Toronto Transit Commission
- Knoll North American Corp.
- ABC Group

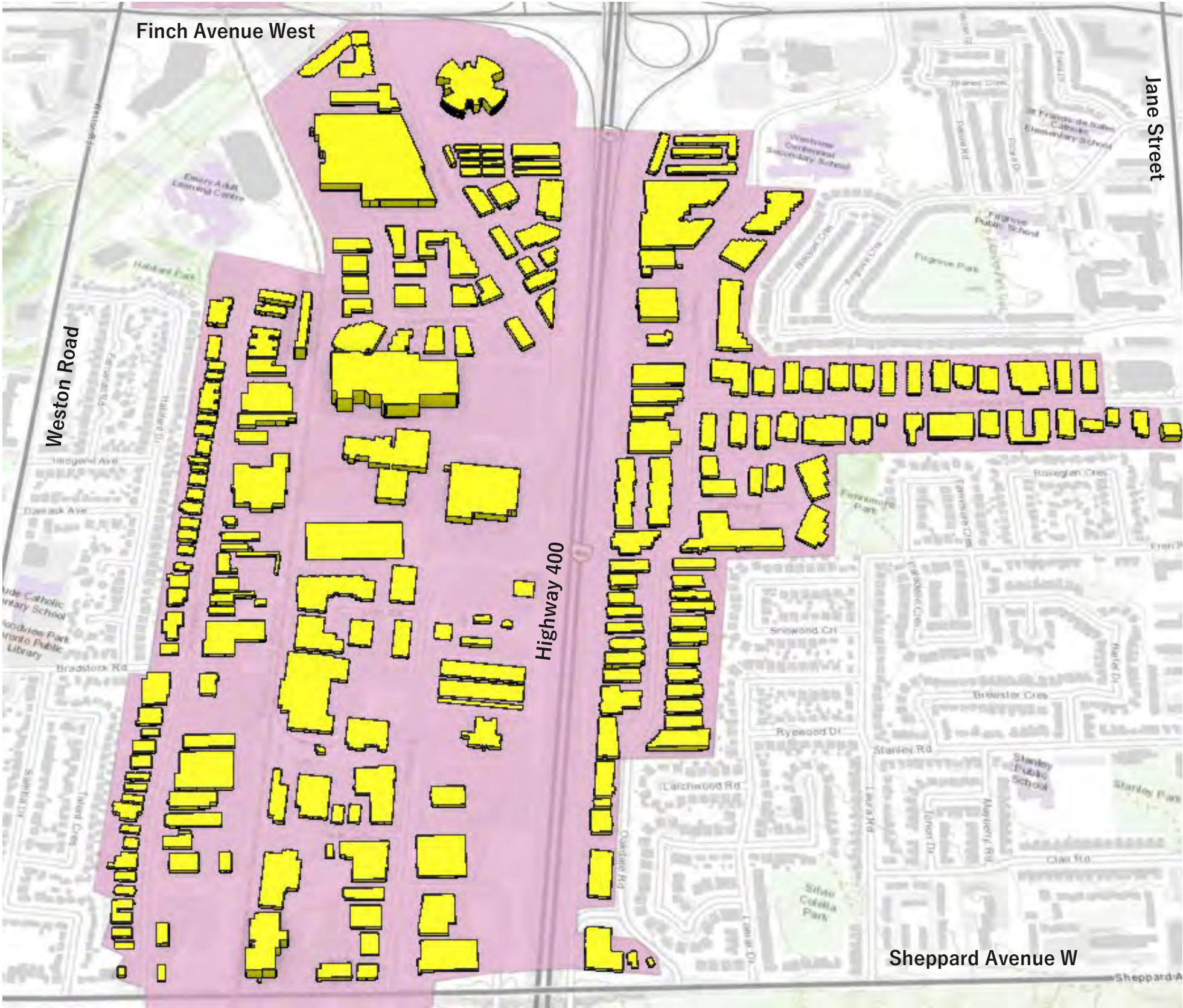


Highway 400 Area – North Portion



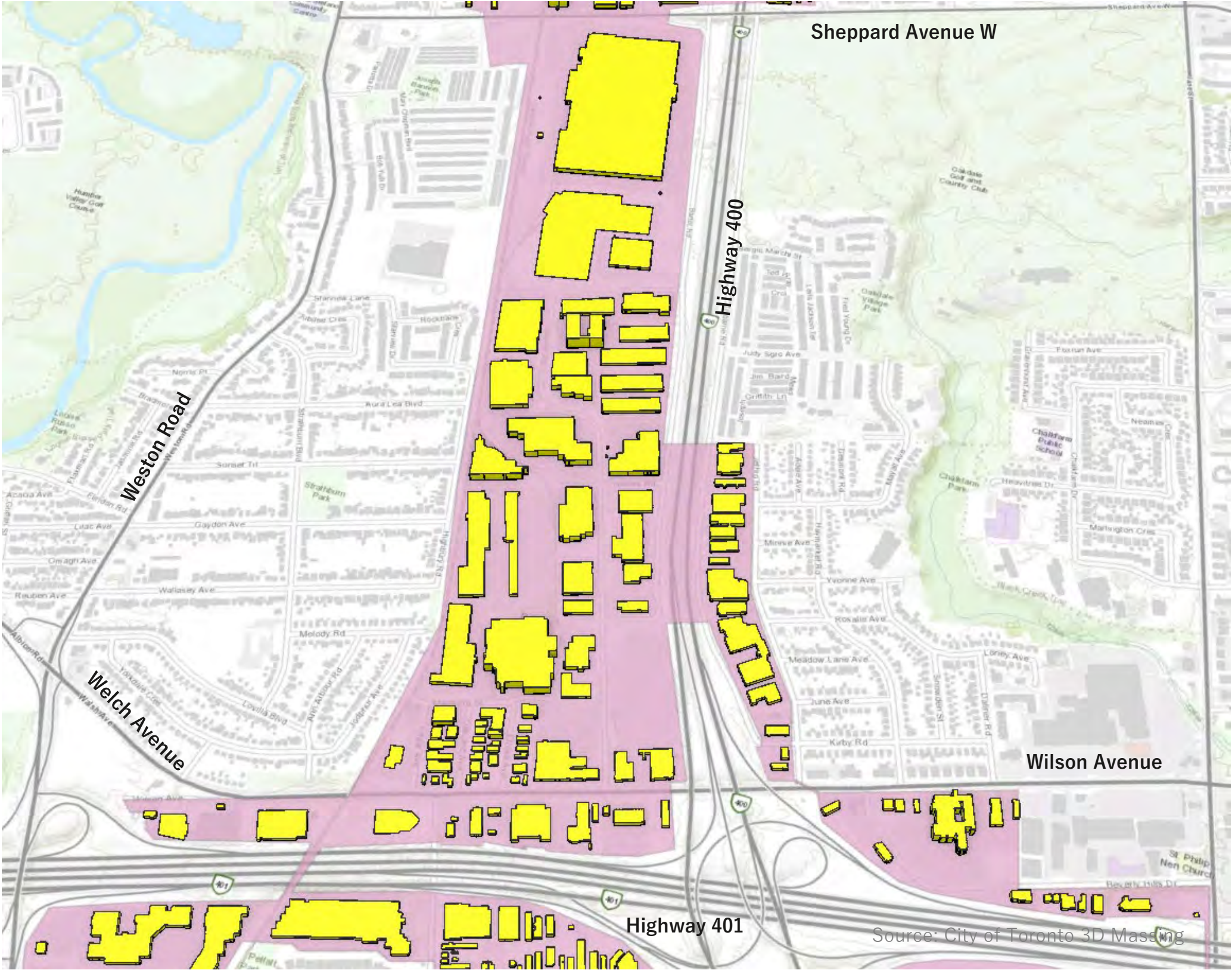
Source: City of Toronto 3D Massing

Highway 400 Area - North-Central Portion

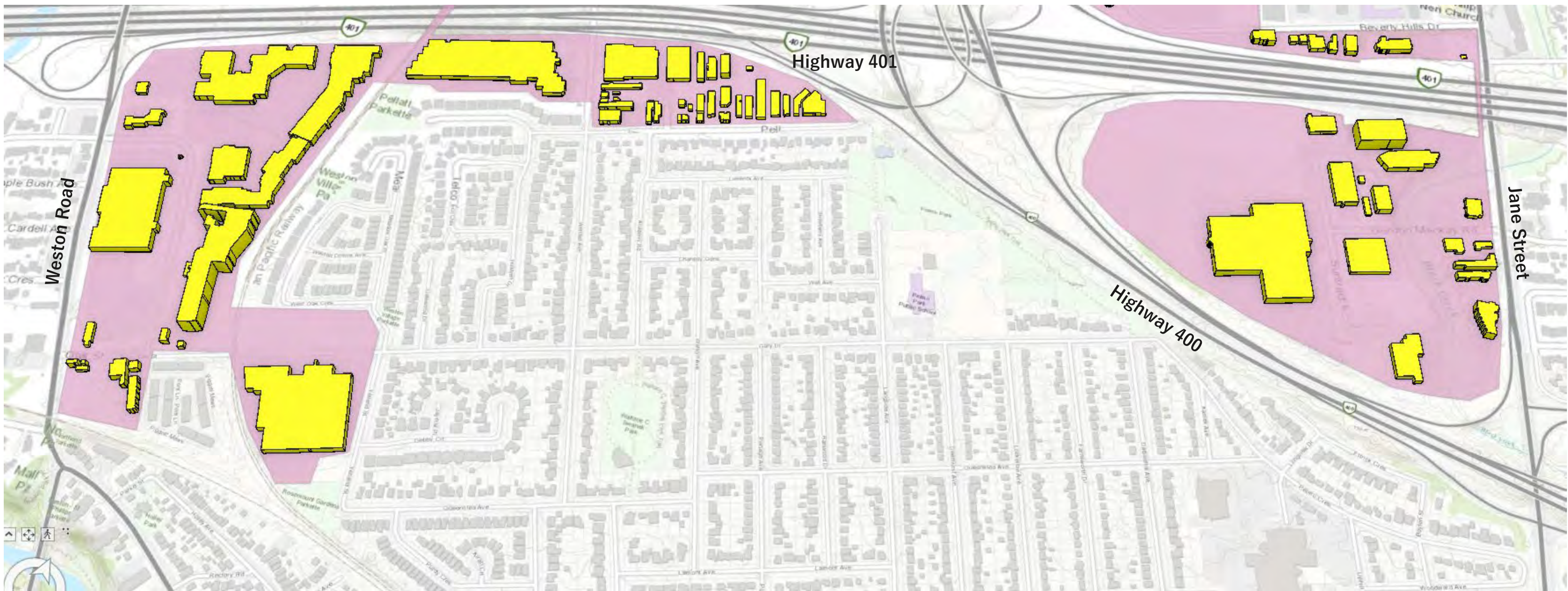


Source: City of Toronto 3D Massing

Highway 400 Area - South-Central Portion

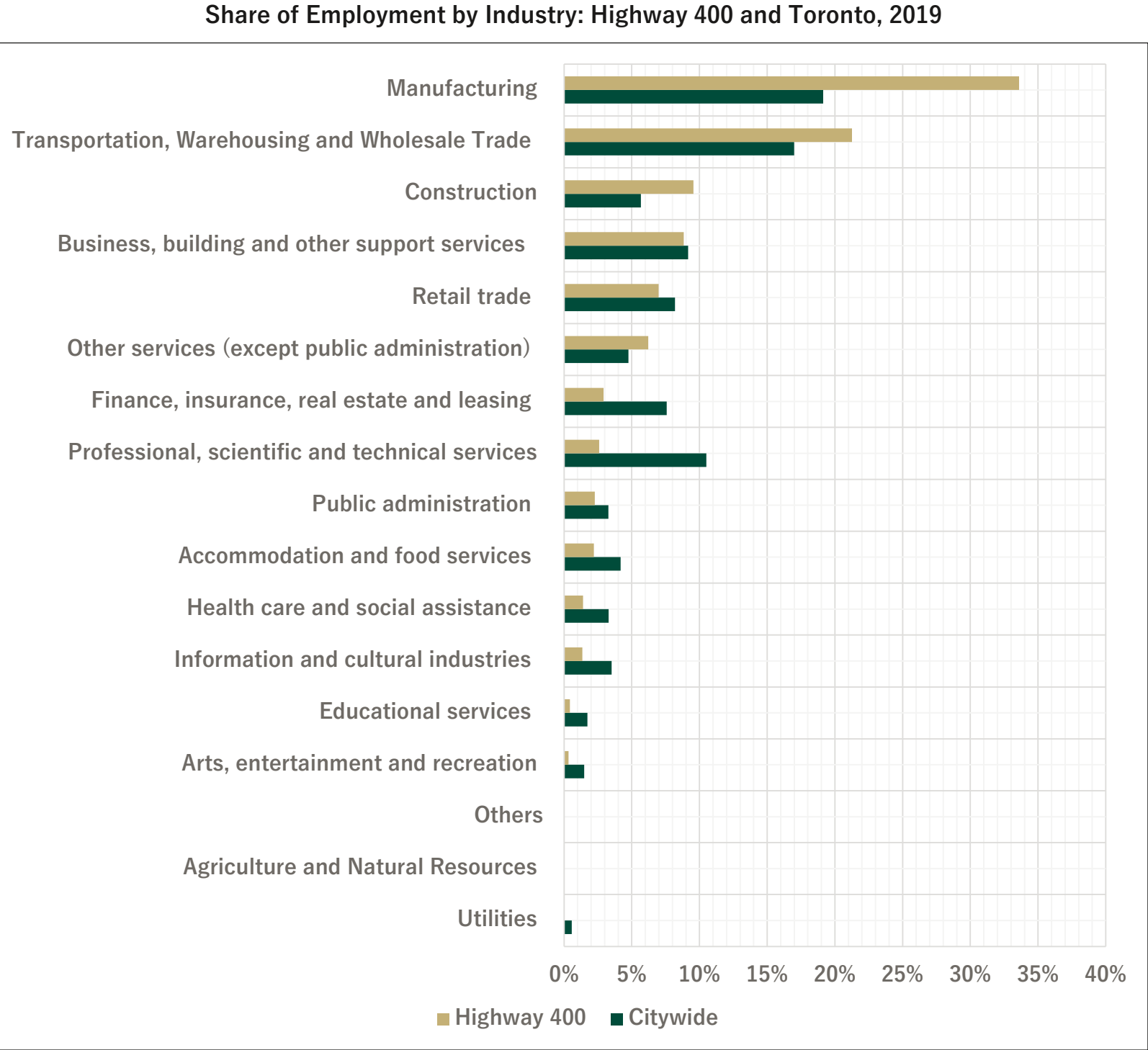


Highway 400 Area – South Portion



Source: City of Toronto 3D Massing

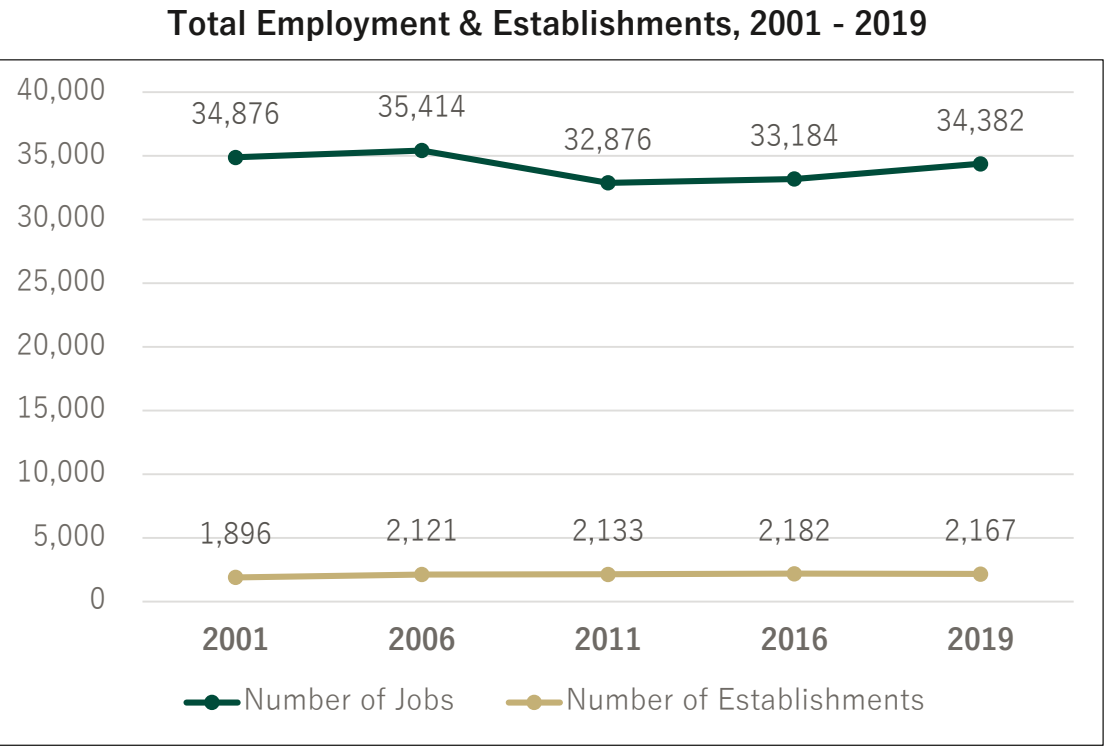
Share of Employment by Industry: Highway 400 and Toronto, 2019



Source: City of Toronto Employment Survey, 2019

NAICS Categories	Number of Jobs
Manufacturing	11,550
Transportation, Warehousing and Wholesale Trade	7,310
Construction	3,290
Business, building and other support services	3,040
Retail trade	2,400
Other services (except public administration)	2,140
Finance, insurance, real estate and leasing	1,000
Professional, scientific and technical services	890
Public administration	780
Accommodation and food services	760
Health care and social assistance	480
Information and cultural industries	470
Educational services	150
Arts, entertainment and recreation	110
Agriculture and Natural Resources	0
Others	0
Utilities	0
Total	34,380

Source: City of Toronto Employment Survey, 2019

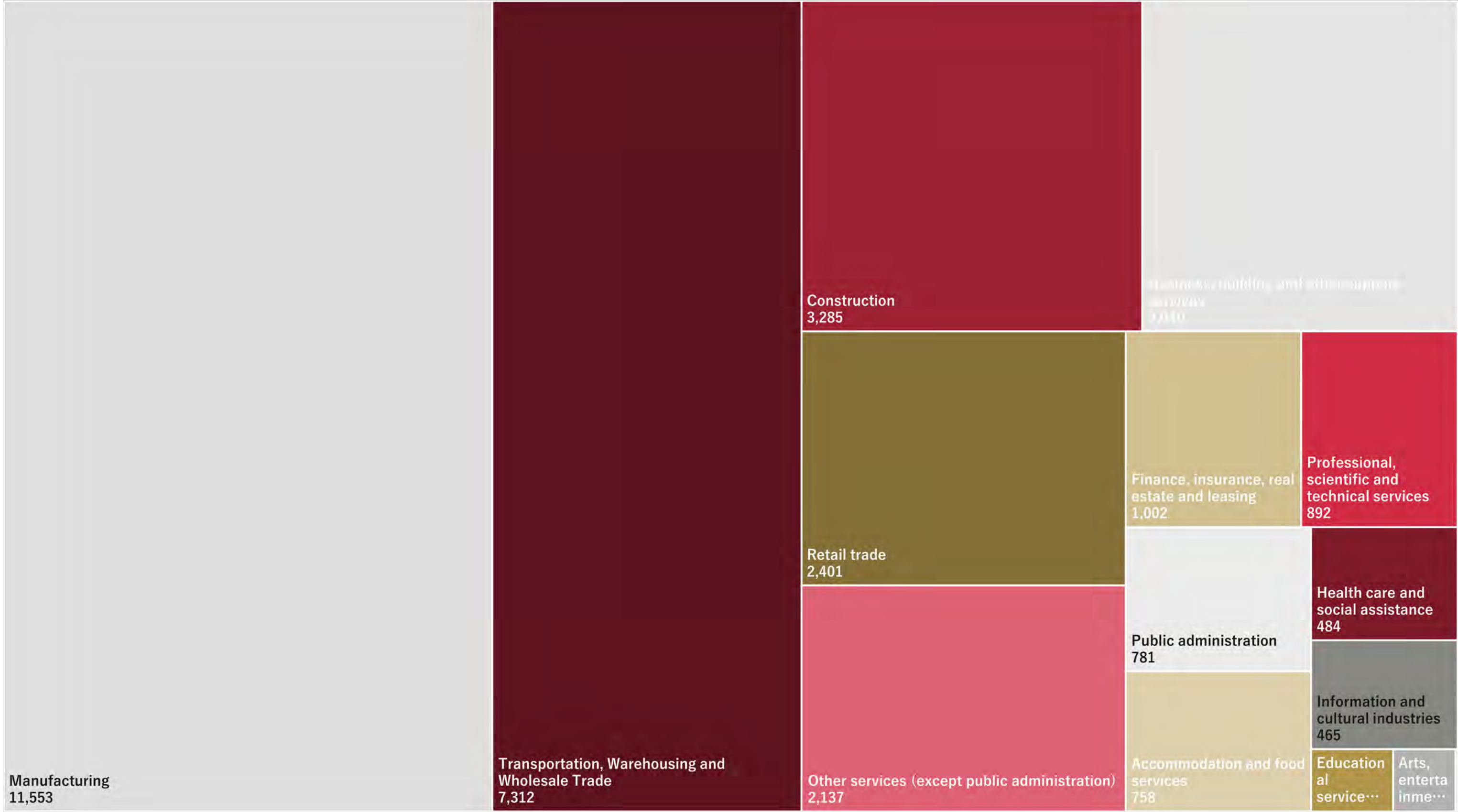


Source: City of Toronto Employment Survey, 2001-2019

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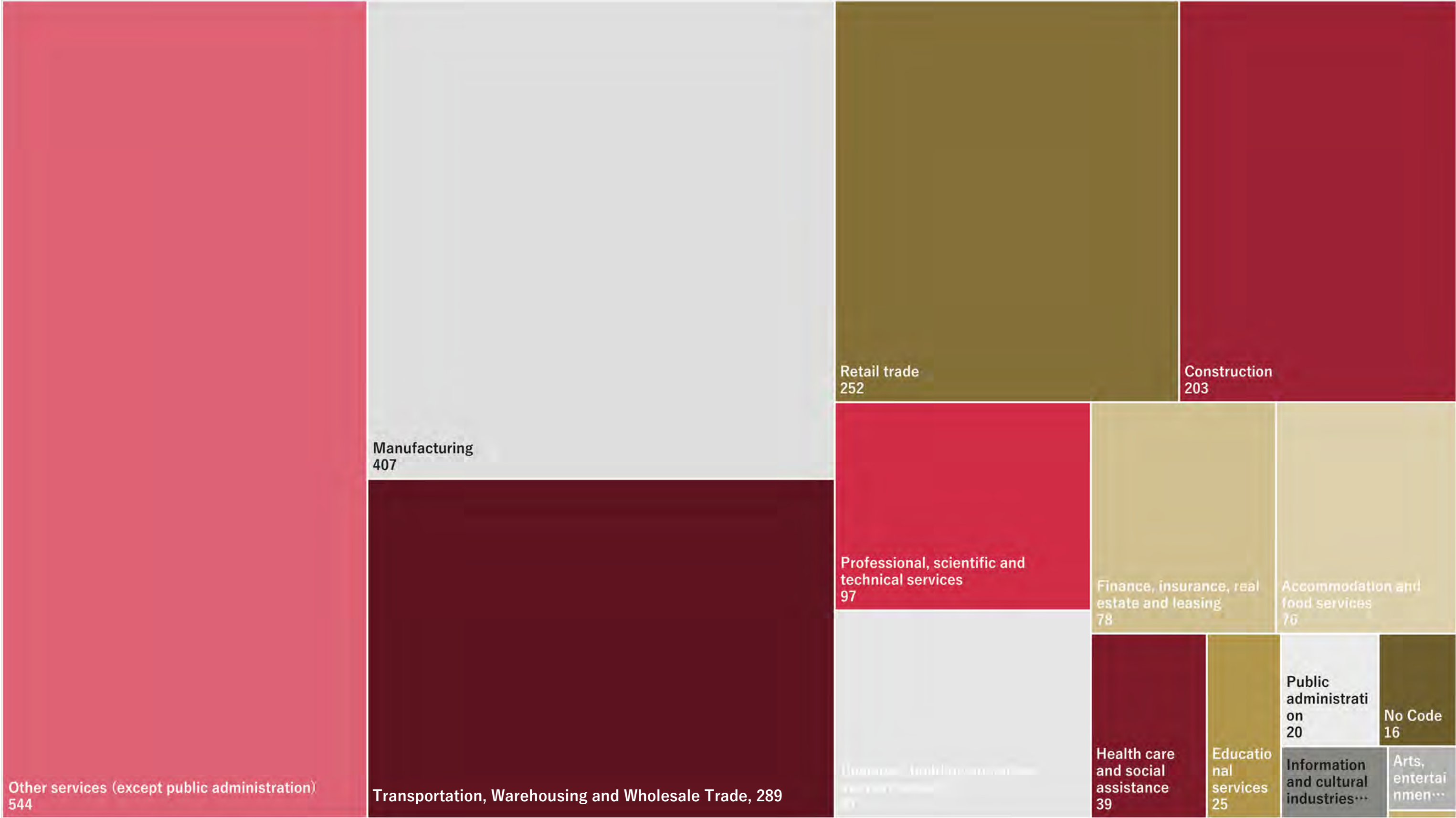
Total Employment by Industry (NAICS), 2019:



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

Source: Toronto Employment Survey, 2019

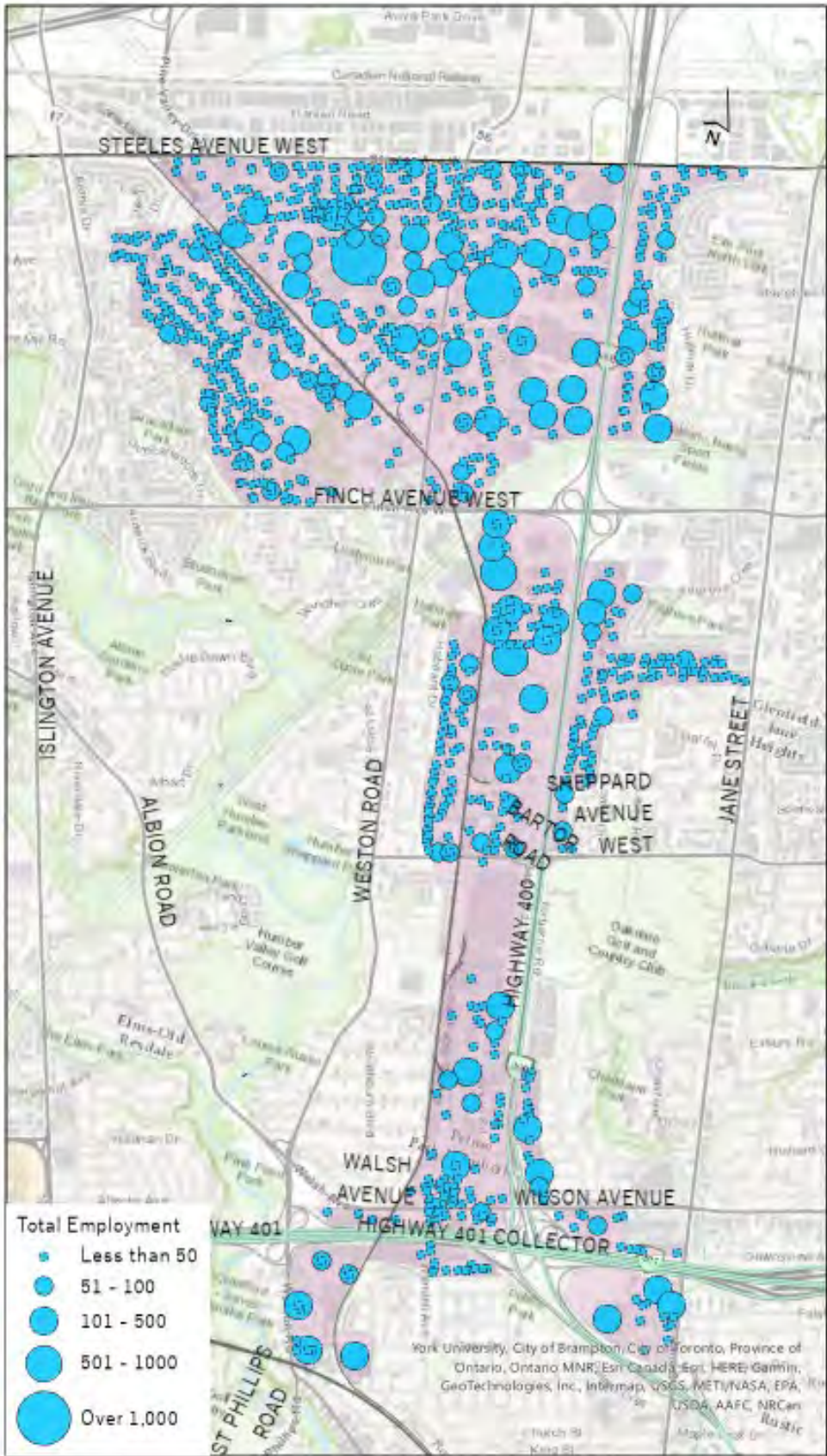
Total Establishments by Industry (NAICS), 2019



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

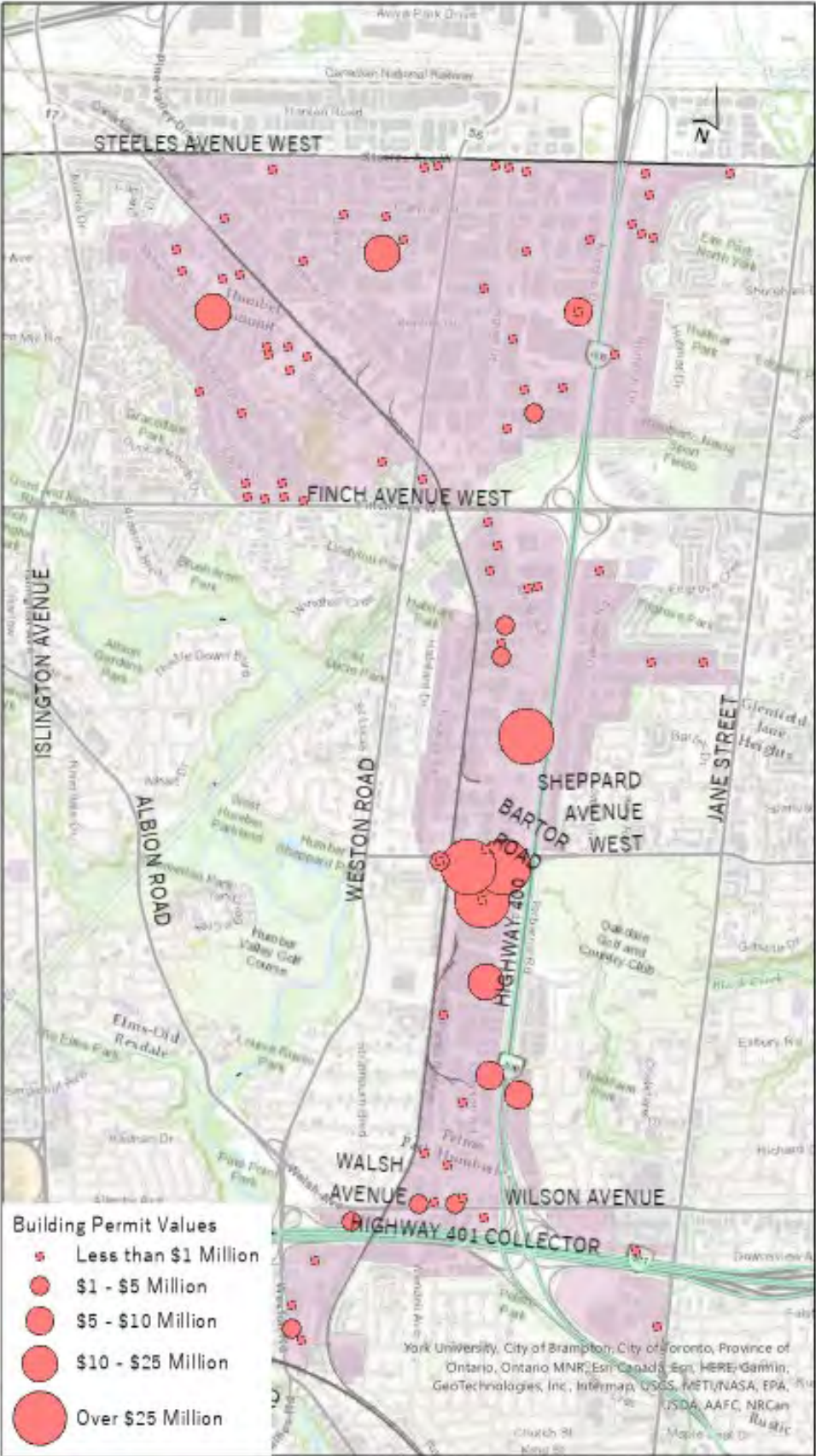
Source: Toronto Employment Survey, 2019

Employment and Establishments in Highway 400 Area



Total Employment by Size of Establishment, 2019
Source: City of Toronto Employment Survey

Value of Non-Residential Building Permits, 2016-2019 in Highway 400 Area

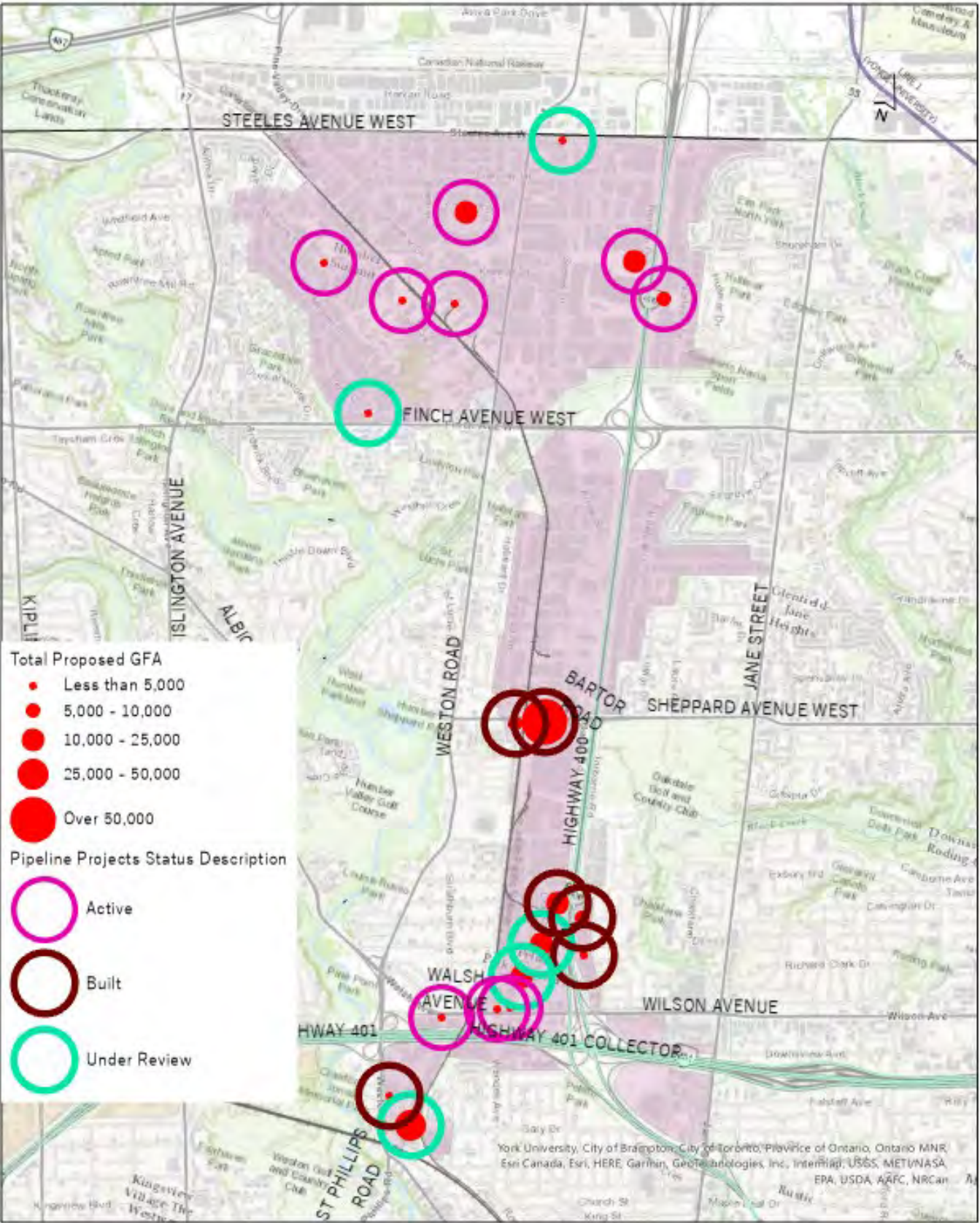


Total Non-Residential Investment (\$000s):	\$421,114
New Building:	\$191,349
Interior Alterations:	\$125,185
Additions:	\$2,810
Multiple Projects:	\$101,540
Demolition:	\$230

Value of Non-Residential Building Permits, 2016 – 2021
Source: City of Toronto, Building Permits



Non-Residential Development Proposals by Status, Q2-2021



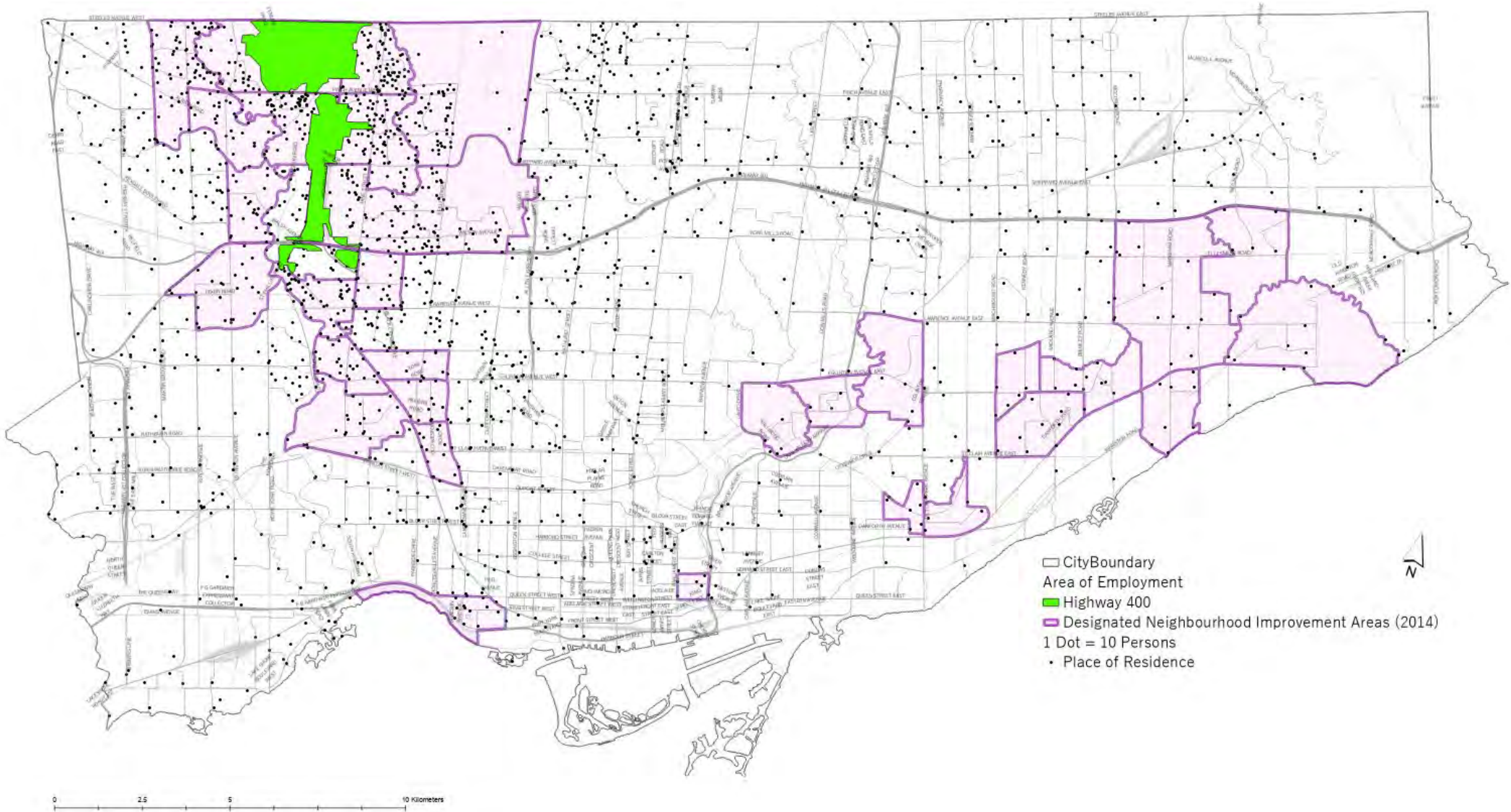
Total Non-Res GFA in Proposed Developments:
257,020 (sq. meters)

Active:	45,640
Built:	130,620
Under Review:	80,760

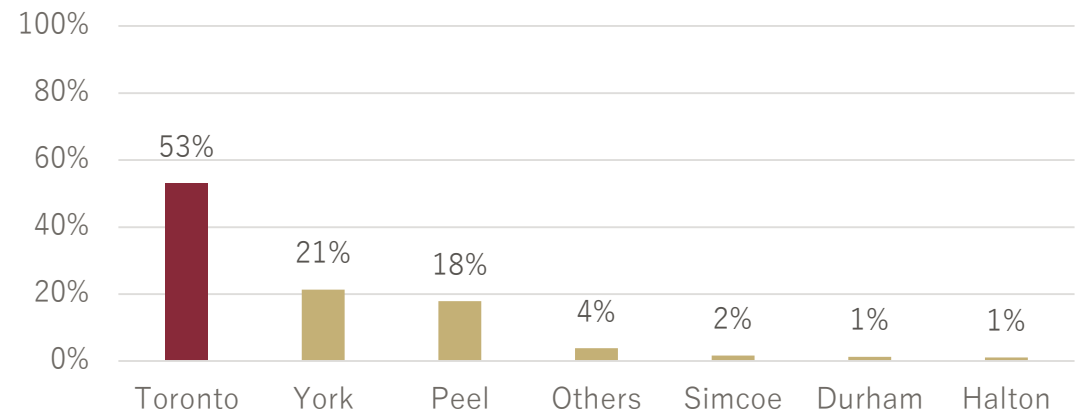
Non-Residential Development Proposals by Status
Source: City of Toronto Development Pipeline



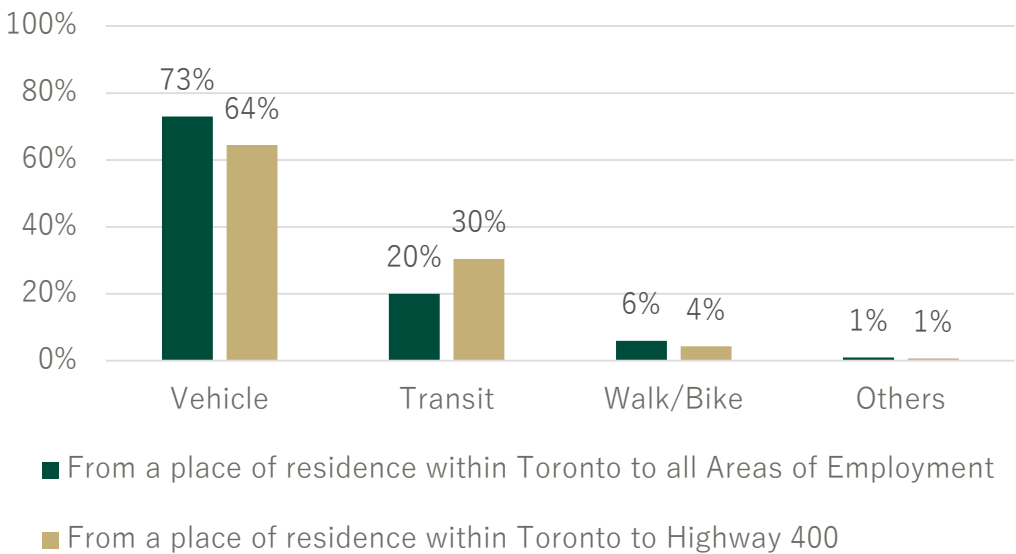
Place of Residence for Workers in Highway 400 Area of Employment



Percent Distribution of Place of Residence



Mode of Transport of Commuters from Within Toronto to All Areas of Employment Compared to Highway 400



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

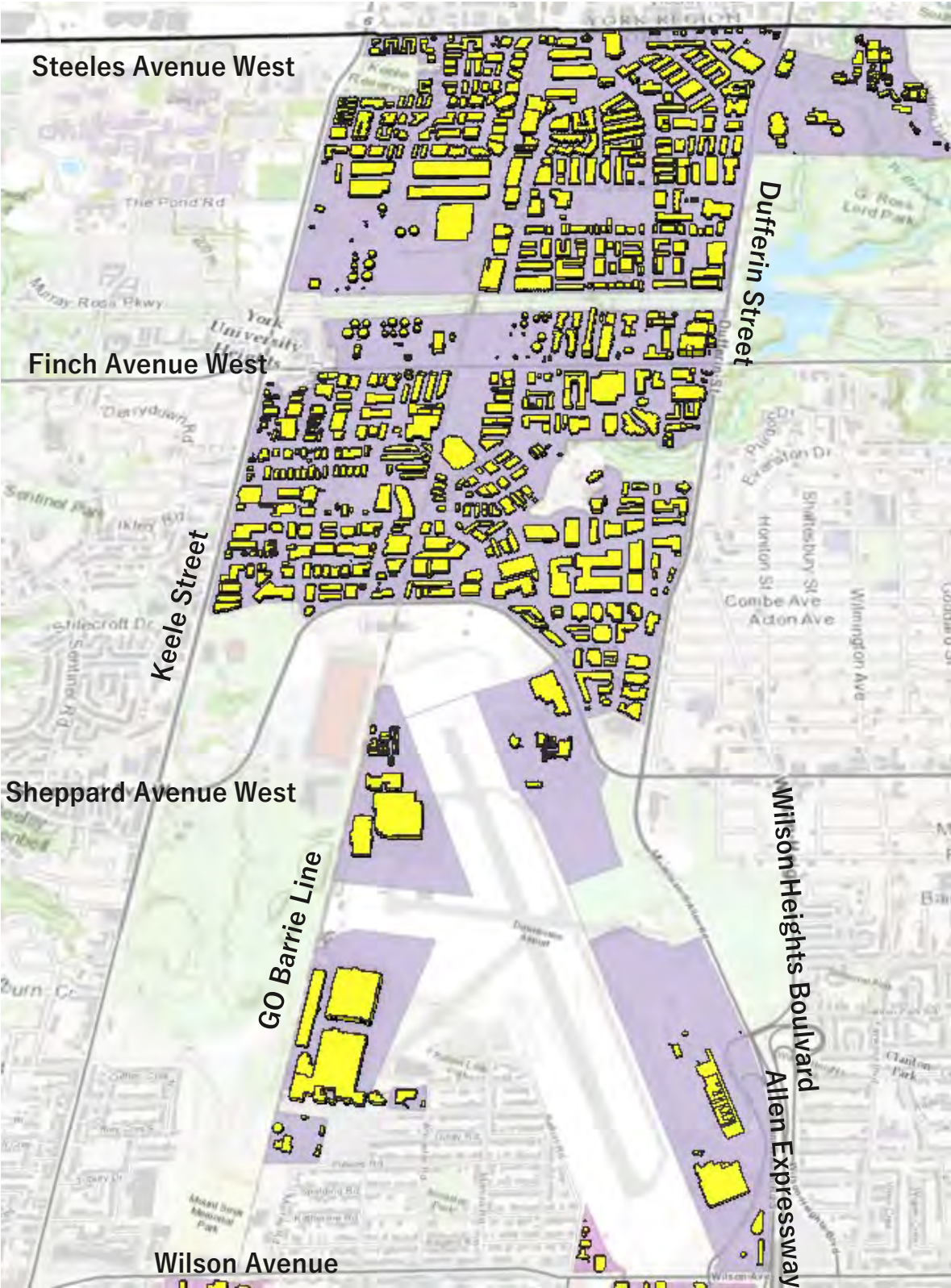


Profile 18

Downsview Area of Employment

Downsview Area of Employment

Area Context: The Downsview area of employment lies between Keele and Dufferin Streets south of Steeles to Wilson Ave., including the former Downsview airport lands (currently subject to redevelopment discussions). It is a large area featuring manufacturing and warehousing/distribution facilities at different scales, and is home to numerous business services firms and commercial showrooms. The Duke Heights Business Improvement Area represents over 2,500 businesses in Downsview North and Central areas and is the second largest in North America.



Source: City of Toronto 3D Massing

Function & Focus

- With 35,700 total jobs, this area of employment continues to thrive, having almost doubled the slight drop of 1,000 jobs between 2011 and 2016 with the addition of 1,800 jobs in the last three years.
- Dominant sectors are Manufacturing (22%), Transportation, Warehousing & Wholesale Trade (16%) and Professional, Scientific & Technical Services (12%); a profile that has been consistent since 2011.
- 22% of Public Administration jobs in all Toronto areas of employment are found here, along with 13% of all Education Service jobs and 10% each of all jobs in Arts, Entertainment & Recreation, Health Care and Professional, Scientific & Technical Services.
- This area includes an office cluster known as the Dufferin – Finch submarket with inventory of about 1 million square feet generally built during the 1970s and 1980s.
- 60% of the office inventory is Class C space with a tenant mix of smaller occupants including non-profits and call centres.
- The employment density here is estimated at about 61 jobs per hectare over the 588 hectares of employment land.
- It is estimated that less than 1% of the 18 million sq. ft. of industrial space is vacant.
- \$251 million was invested in construction and alterations of industrial / commercial projects over the past five years, and there is 56,000 square metres of new development in the pipeline.
- Of the 56% of workers in the Downsview area of employment who live within the City of Toronto (19,000), 34% chose a low-carbon mode of travel to work: 30% use transit, while 4% walk or bicycle.
- 29% of these workers reside in Neighbourhood Improvement Areas.



Key Map

Key Facts:

Total Land Area (Net Ha)	587.9 ha
Total Employment	35,661
Total Establishments	2,511
Rentable Building Area**(Industrial)	17.7 million sft.
Vacancy Rate(2021)	0.8 %
Employment Density (Net jobs/ha)	60.6

** Source: CoStar Group, www.costar.com

Top Employers:

- Toronto Transit Commission
- Sanofi Pasteur Ltd.
- Department of National Defense
- Teknion
- Global Upholstery

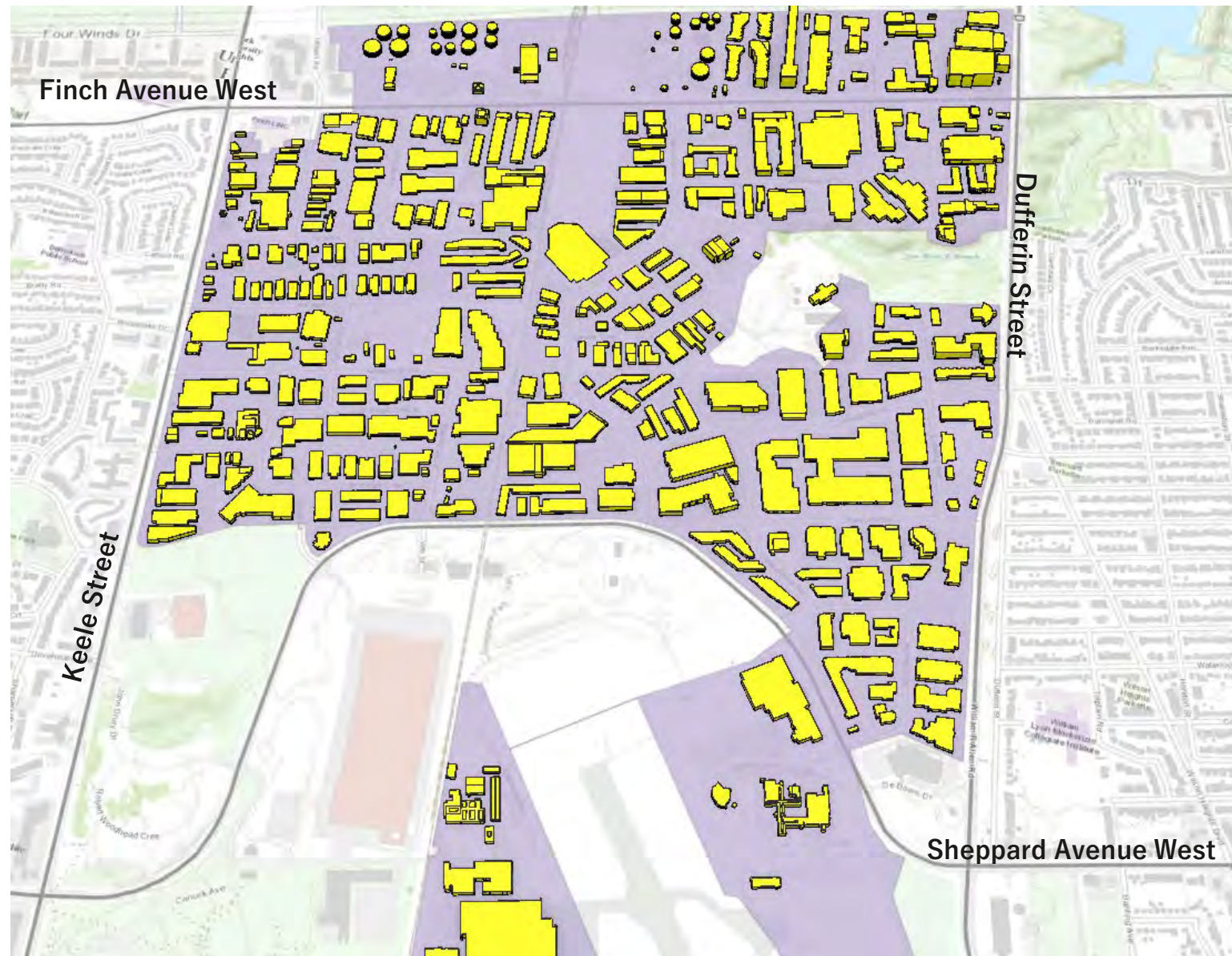


Downsview Area North



Source: City of Toronto 3D Massing

Downsview Area Central



Source: City of Toronto 3D Massing

Downsview Area South

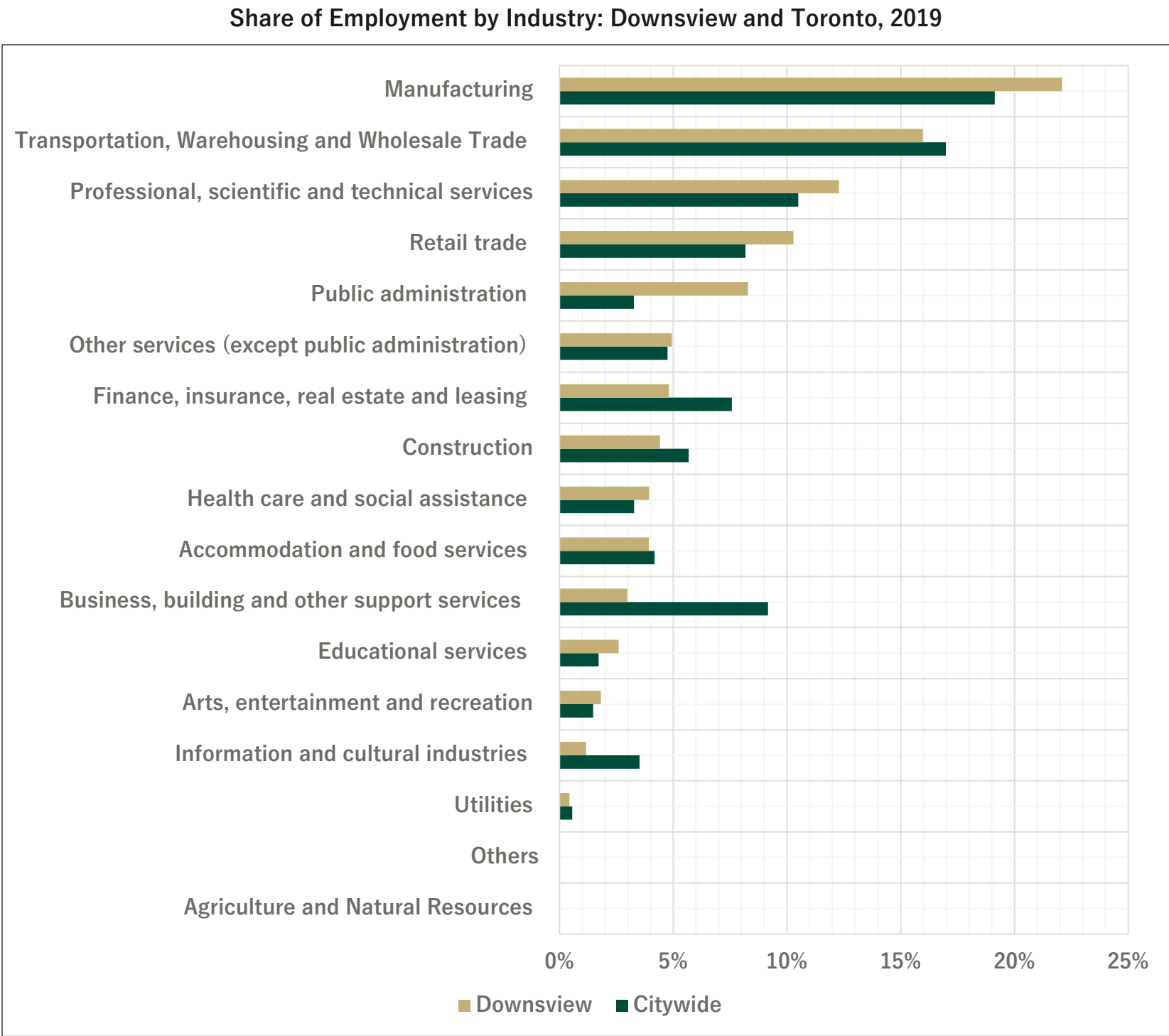


Source: City of Toronto 3D Massing

Outlook

- Downsview will continue to attract a range of users as it offers good access to labour and a central location. New transit stops are planned for Keele / Finch and Sheppard / Chesswood.
- Downsview South contains Northcrest's Downsview lands that will be developed after Bombardier Aerospace closes its assembly plant in December 2023. One of the first phases will be the construction of a new \$200 million (102,260 square metre) television and film studio complex, which will serve as an anchor for the area's new Media, Technology & Innovation Hub.
- Development occurring in the neighbourhoods surrounding Downsview Park is creating pressure for land use conversion in portions of this employment area.
- The small inventory of office space will continue to appeal to low-cost businesses, particularly those businesses serving nearby industrial firms.
- A portion of the employment land is within the boundaries of the Update Downsview Secondary Plan Study, which looks to update the Secondary Plan and set out a long-term vision.

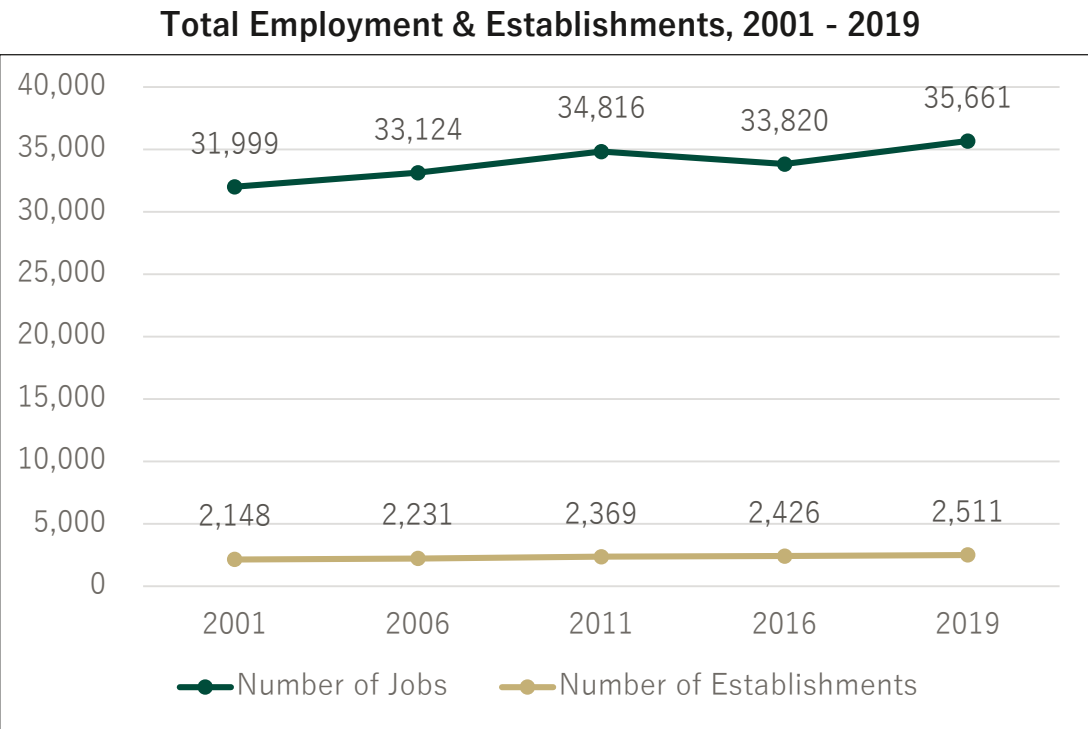
Share of Employment by Industry: Downsview and Toronto, 2019



Source: City of Toronto Employment Survey, 2019

NAICS Categories	Number of Jobs
Manufacturing	7,880
Transportation, Warehousing and Wholesale Trade	5,700
Professional, scientific and technical services	4,380
Retail trade	3,670
Public administration	2,960
Other services (except public administration)	1,760
Finance, insurance, real estate and leasing	1,720
Construction	1,580
Health care and social assistance	1,400
Accommodation and food services	1,400
Business, building and other support services	1,060
Educational services	930
Arts, entertainment and recreation	650
Information and cultural industries	420
Utilities	160
Others	10
Agriculture and Natural Resources	0
Total	35,660

Source: City of Toronto Employment Survey, 2019

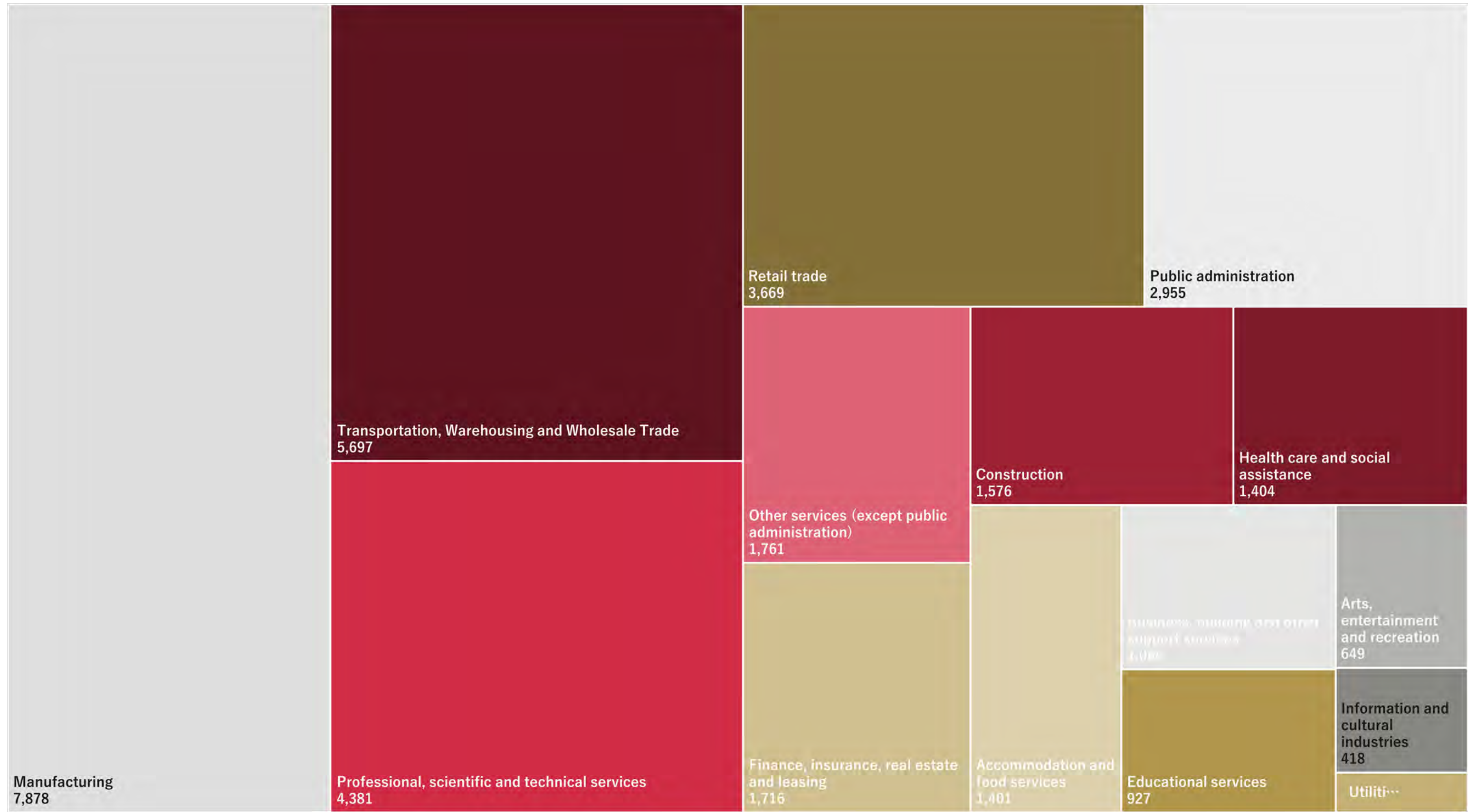


Source: City of Toronto Employment Survey, 2001-2019

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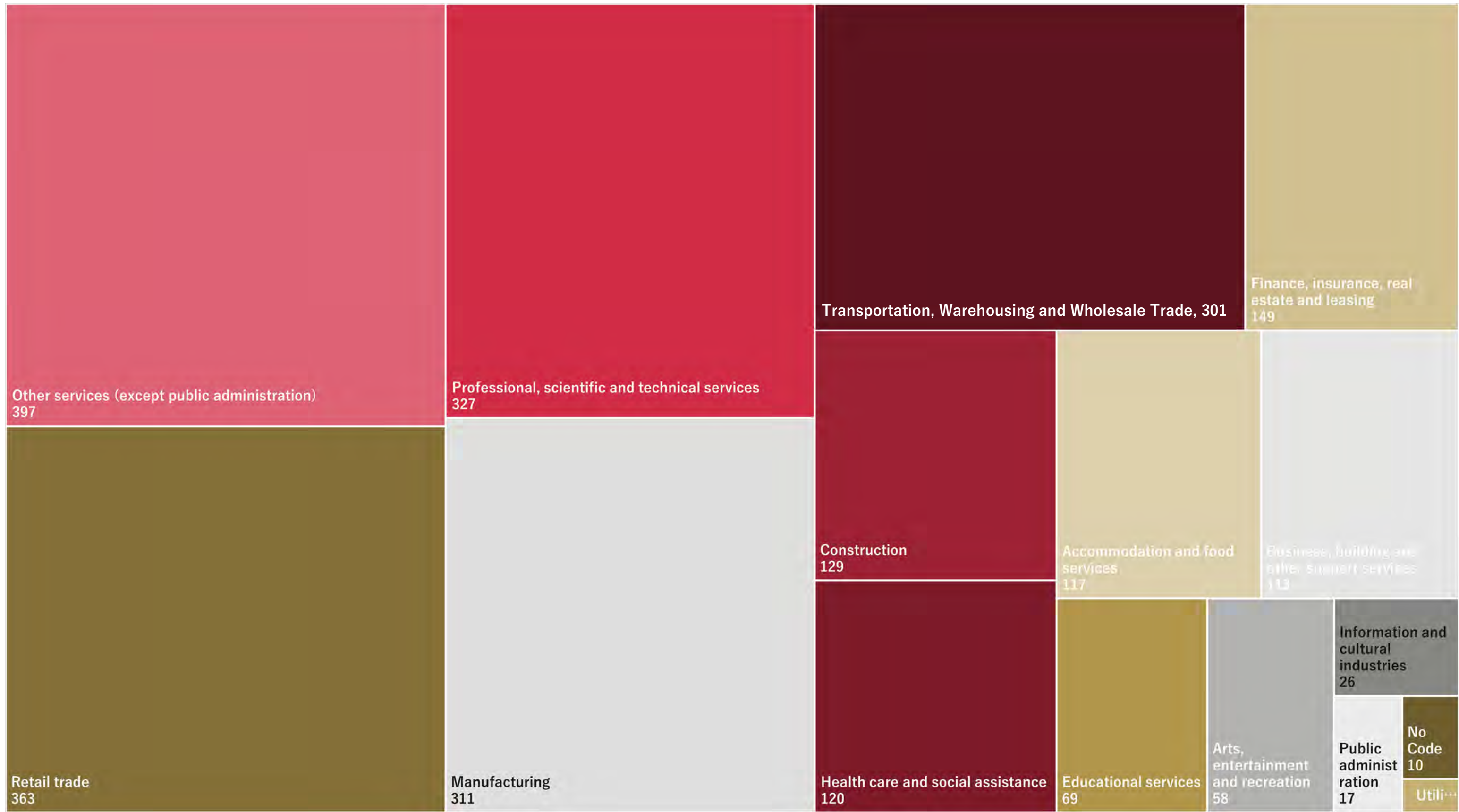
Total Employment by Industry (NAICS), 2019:



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

Source: Toronto Employment Survey, 2019

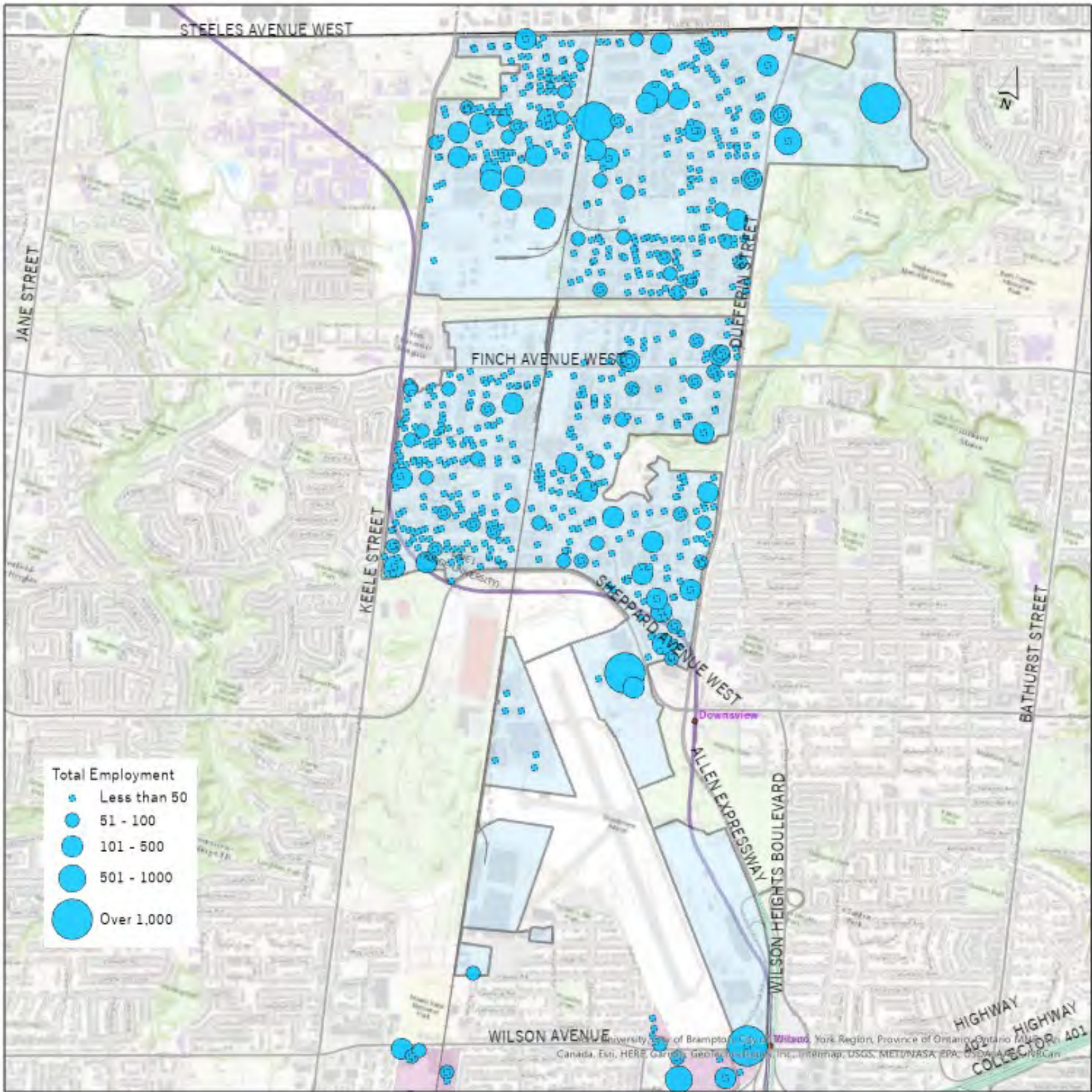
Total Establishments by Industry (NAICS), 2019



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

Source: Toronto Employment Survey, 2019

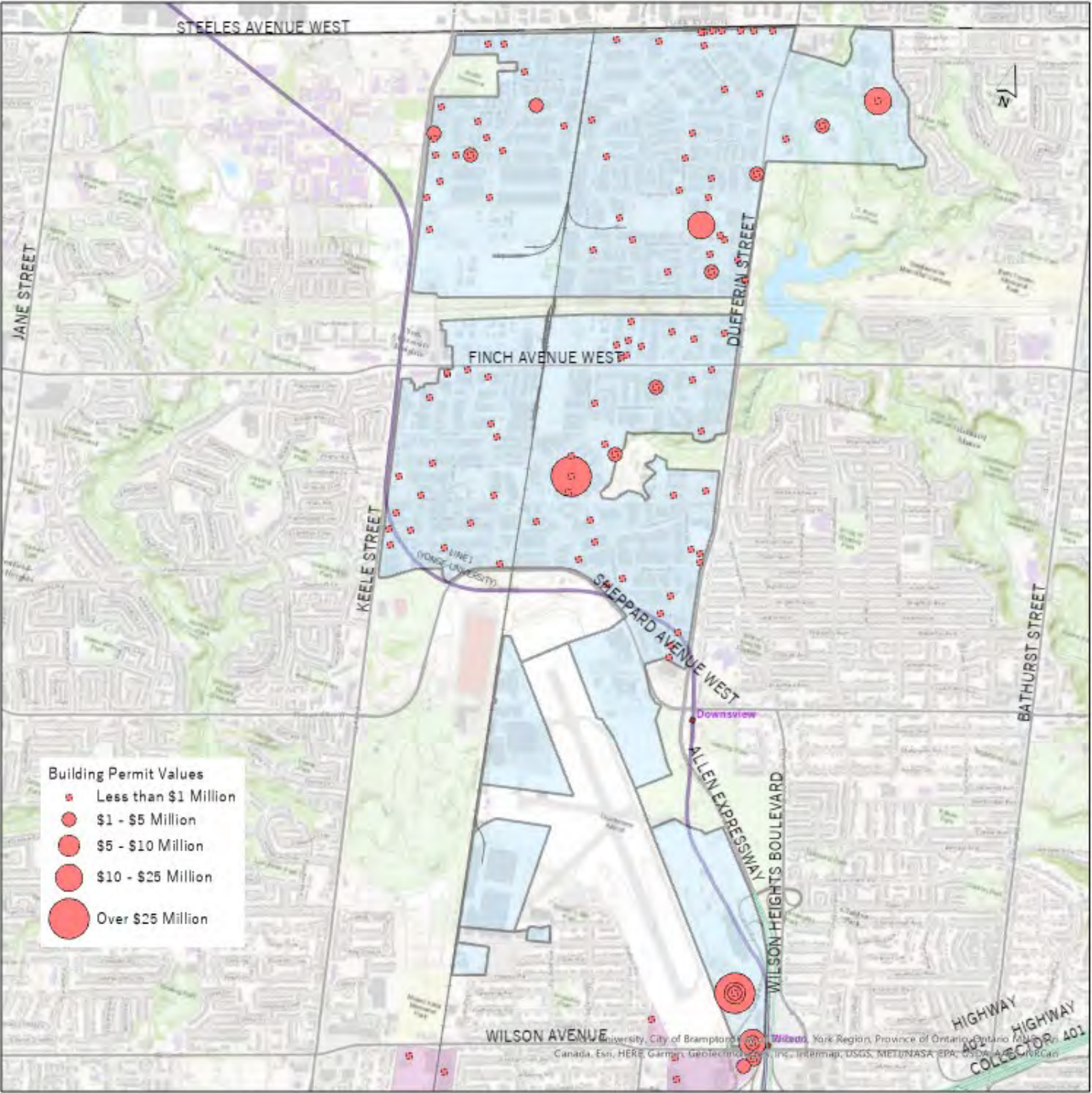
Employment and Establishments in Downsview Area



Total Employment by Size of Establishment, 2019

Source: City of Toronto Employment Survey

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

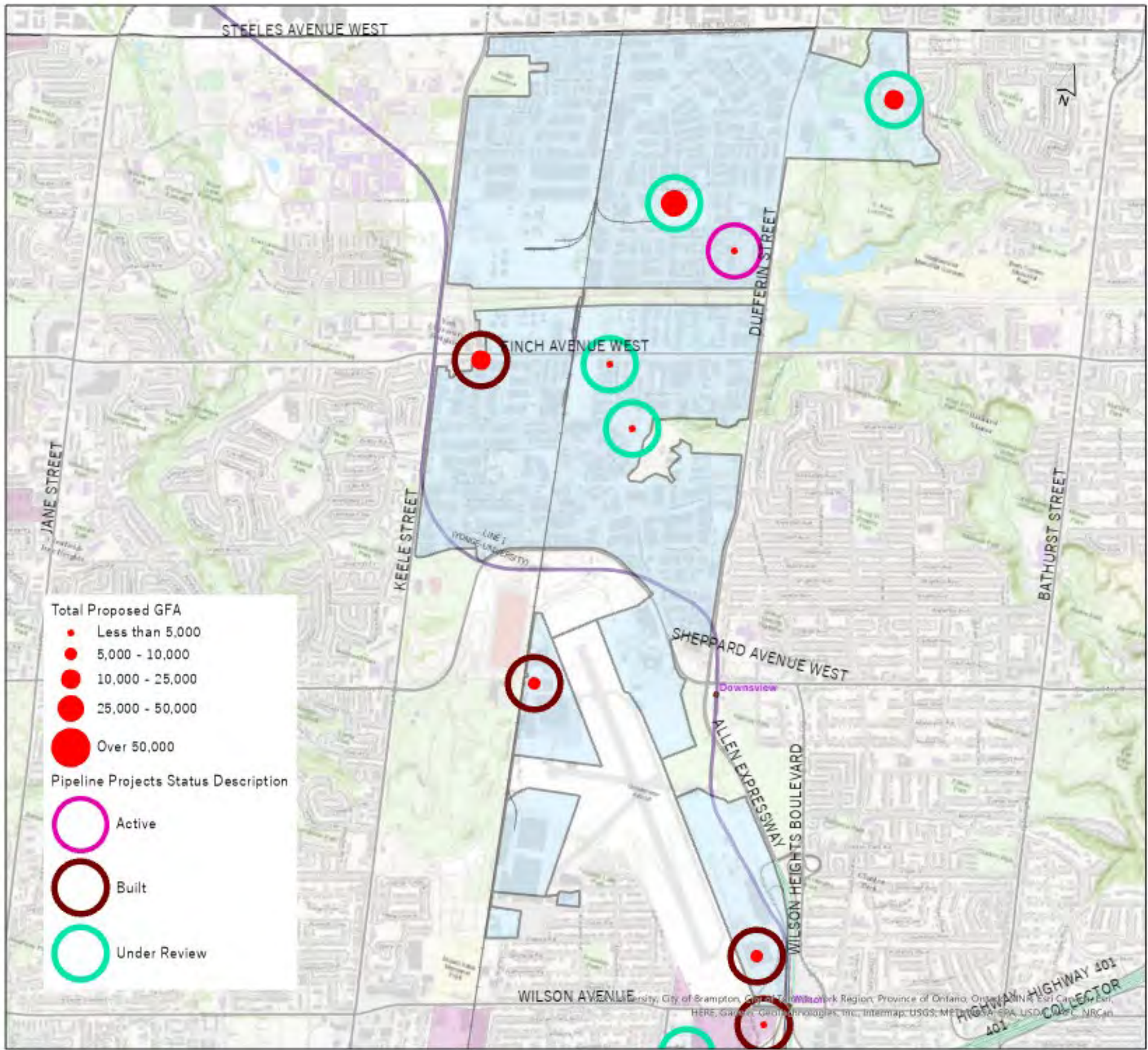


Total Non-Residential Investment (\$000s):	\$250,598
New Building:	\$24,575
Interior Alterations:	\$187,036
Additions:	\$16,087
Multiple Projects:	\$22,901
Demolition:	\$0

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:
82,090 (sq. meters)

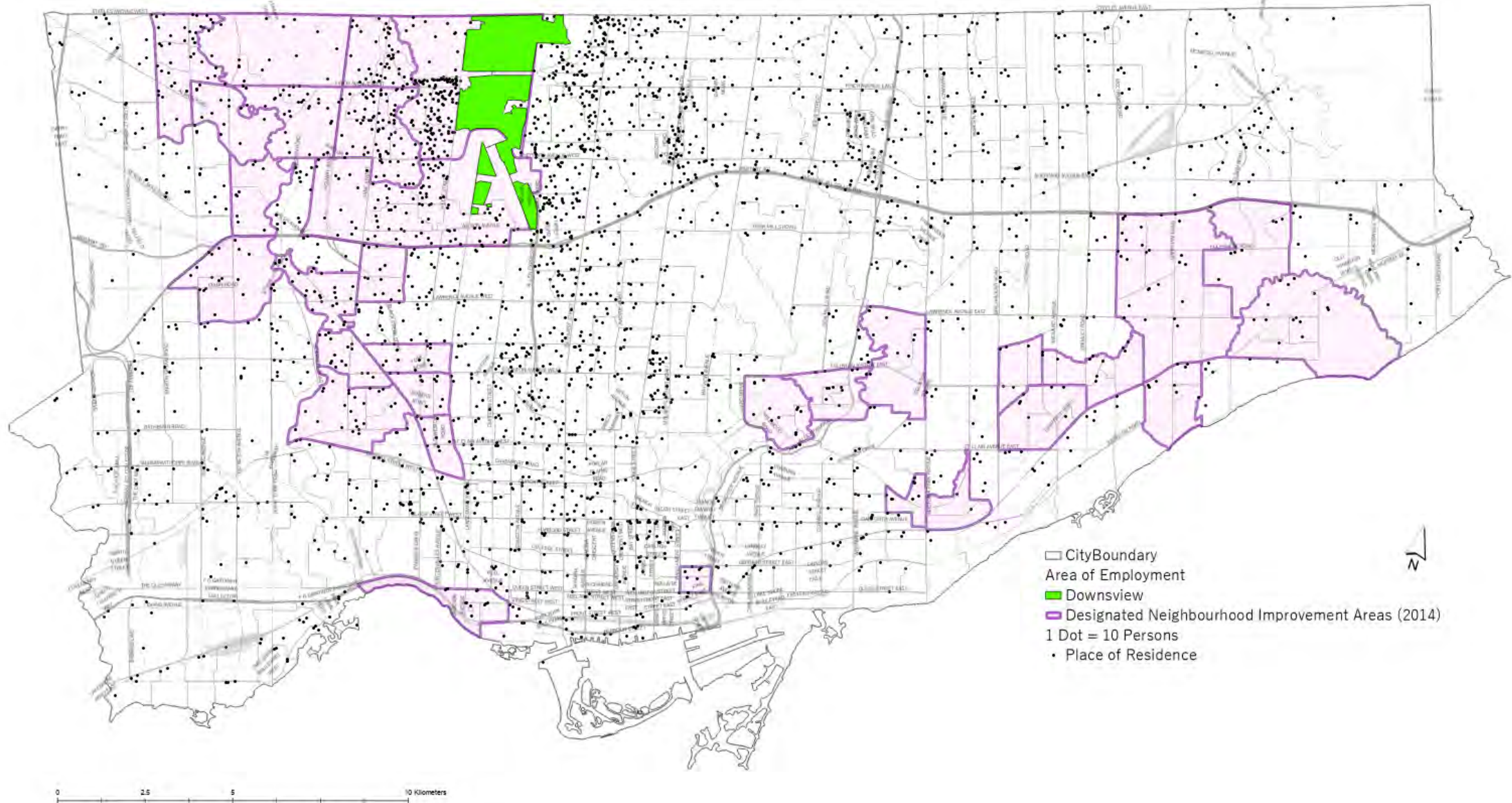
Active:	19,410
Built:	25,690
Under Review:	36,990

Non-Residential Development Proposals by Status

Source: City of Toronto Development Pipeline

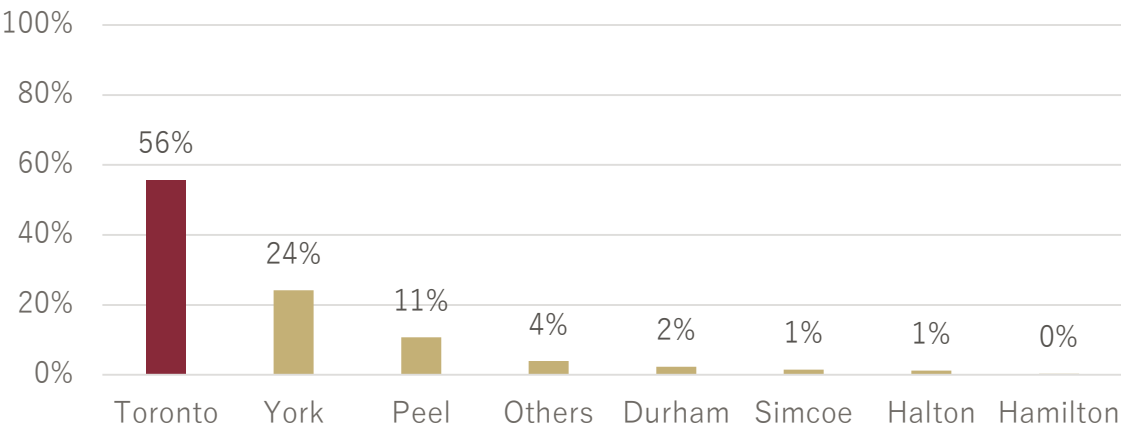


Place of Residence for Workers in Downsview Area of Employment

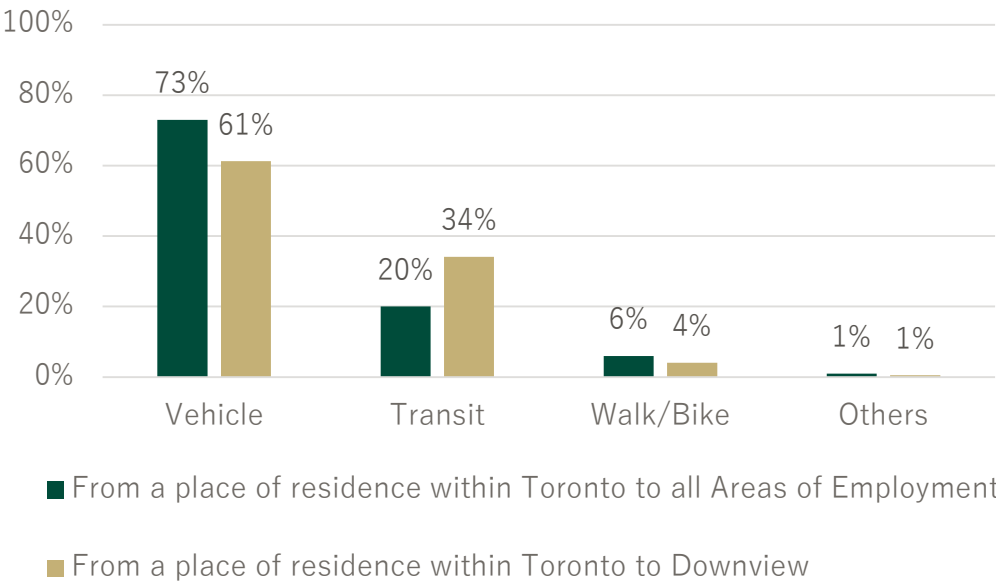


29% of these workers reside in Neighbourhood Improvement Areas.

Percent Distribution of Place of Residence



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



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



Profile 19

Caledonia – South Downsview Area of Employment

Caledonia – South Downsview Area of Employment

Area Context:

The Caledonia – South Downsview area of employment, roughly between Keele and Dufferin Streets south of Highway 401 to Castlefield Ave., may seem like an extension of the Downsview area. However, it warrants a separate profile owing to its focus on design and décor which differentiates it from other areas.



Key Map

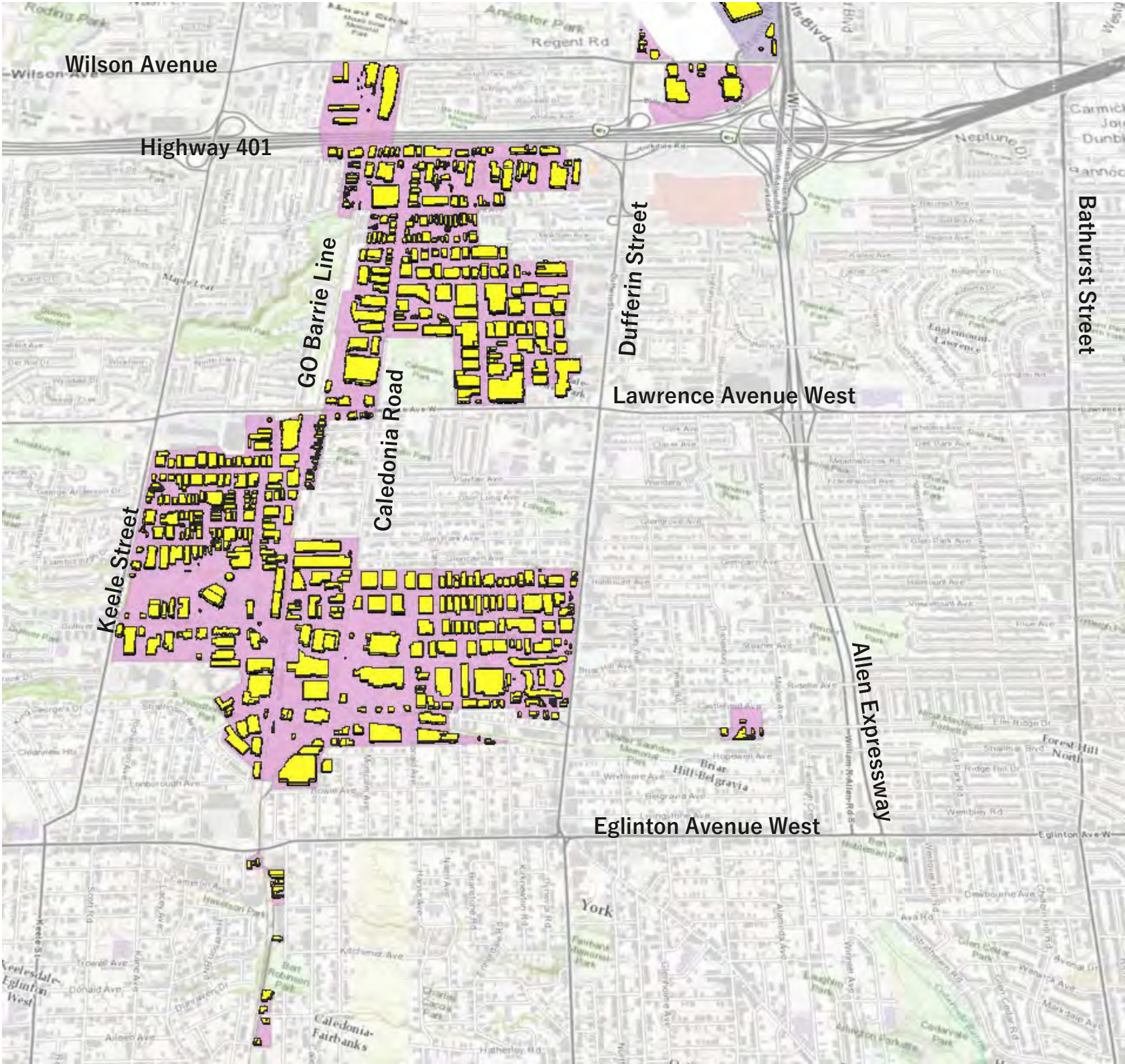
Key Facts:

Total Land Area (Net Ha)	289.2 ha
Total Employment	20,390
Total Establishments	1,322
Rentable Building Area**(Industrial)	8.90 million sft.
Vacancy Rate(2021)	1.6 %
Employment Density (Net jobs/ha)	70.3

** Source: CoStar Group, www.costar.com

Top Employers:

- Precise ParkLink
- Regal Security
- Costco
- Canada Goose
- Y. M. Inc.



Source: City of Toronto 3D Massing



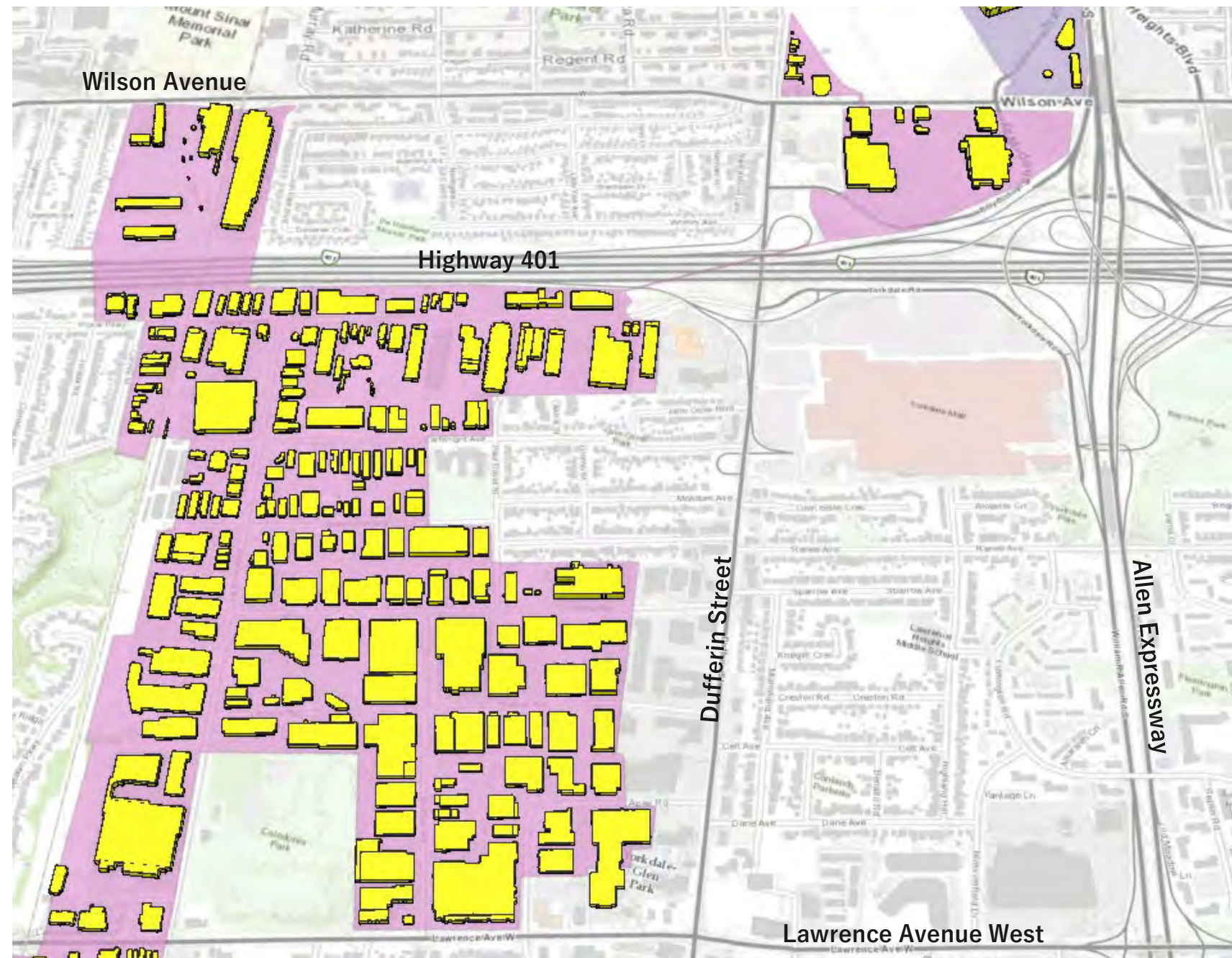
Caledonia – South Downsview Area North

Function & Focus

- With 20,400 total jobs, this area continues to thrive, having added over 4,000 jobs since 2011.
- Dominant sectors are Retail Trade (20%), Business, Building & Support Services (17%), Manufacturing (16%), and Transportation, Warehousing & Wholesale Trade (15%); a profile that has been fairly consistent since 2011 when Manufacturing was last the top sector.
- This area includes a cluster of office properties known as the Keele & Hwy 401 submarket. The small inventory of just under 1 million square feet is older, some buildings dating back to the 1950s.
- 60% of the office market is considered Class C space with a mix of smaller tenants.
- The employment density here is estimated at about 70 jobs per hectare over the 289 hectares of employment land.
- It is estimated that less than 1.6% of the 8.9 million sq. ft. of industrial space is vacant.
- \$116 million was invested in construction and alterations of industrial / commercial projects over the past five years, and there is about 43,000 square metres of new development in the pipeline.
- Of the 71% of workers in the Caledonia – South Downsview area who live within the City of Toronto, 46% chose a low-carbon mode of travel to work: 40% use transit, while 6% walk or bicycle.
- 29% of these workers reside in Neighbourhood Improvement Areas.

Outlook

- Completion of the Eglinton Crosstown transit line will improve labour accessibility to the southern portion of this area of employment
- A portion of the area is within the boundaries of the Update Downsview Secondary Plan Study, which looks to update the Secondary Plan and set out a long-term vision.
- This area offers a critical mass of furniture, home furnishings and décor businesses, which is unique.
- Some properties have been converted from older factory and warehouse uses to commercial showrooms or retail demonstrating how the building stock is able to adapt to market conditions.
- The small office inventory will continue to appeal to low-cost firms.



Caledonia – South Downsview Area Central

Lawrence Avenue West

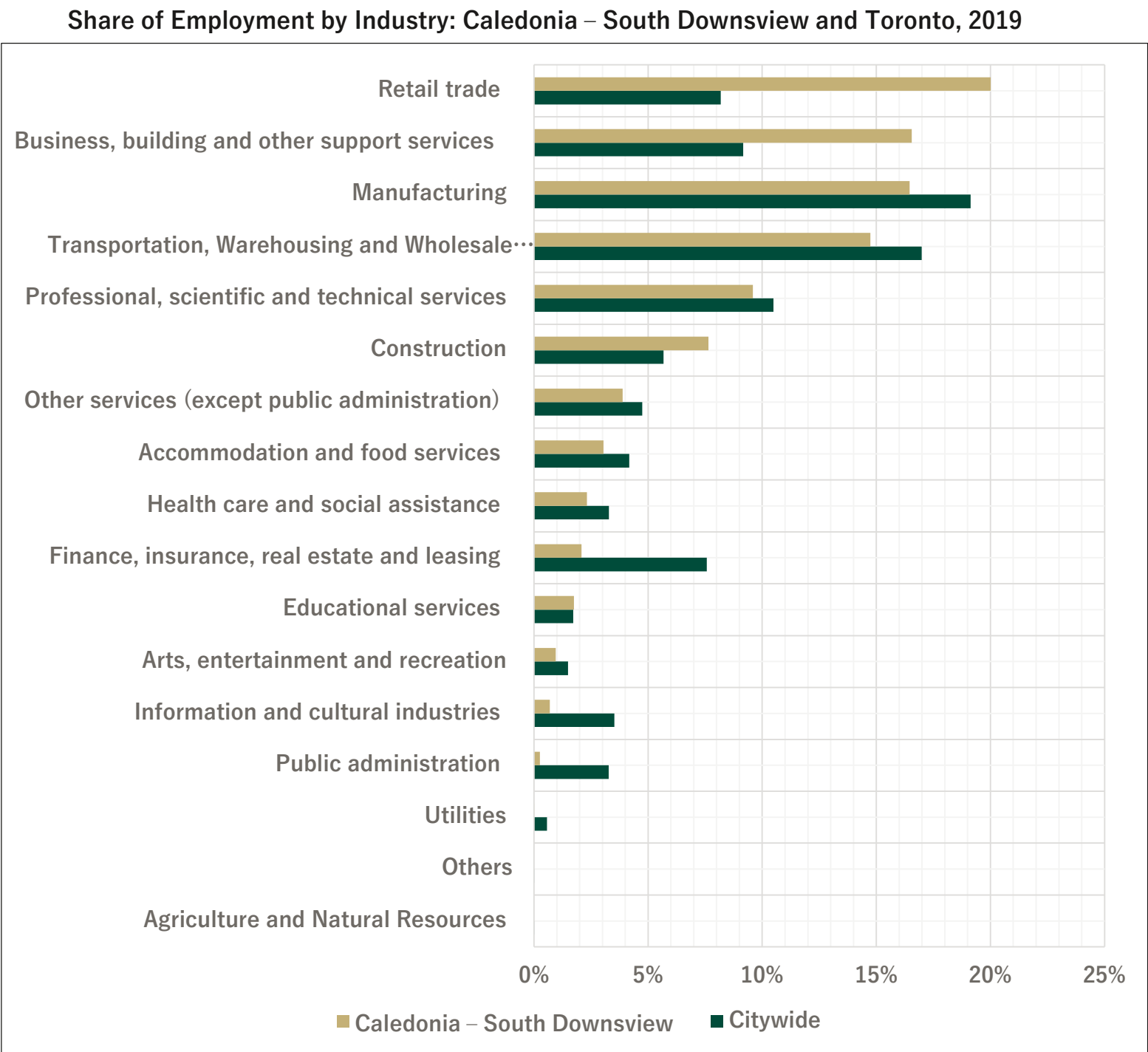


Caledonia – South Downsview Area South

Eglinton Avenue West



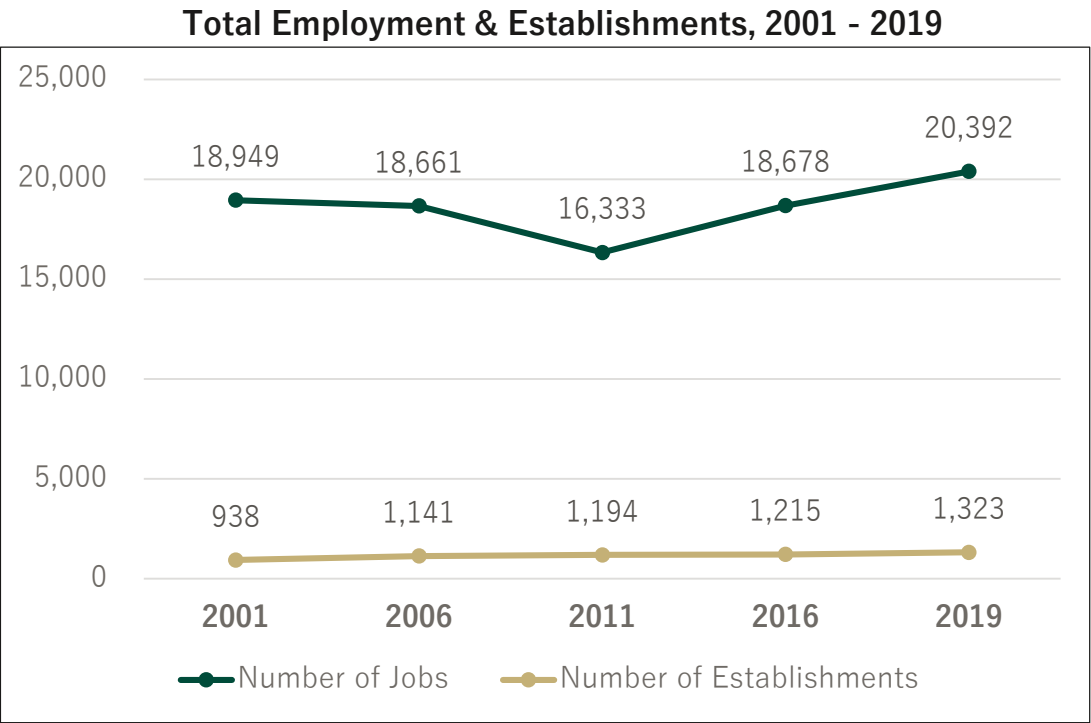
Share of Employment by Industry: Caledonia – South Downsview and Toronto, 2019



Source: City of Toronto Employment Survey, 2019

NAICS Categories	Number of Jobs
Retail trade	4,080
Business, building and other support services	3,370
Manufacturing	3,360
Transportation, Warehousing and Wholesale Trade	3,010
Professional, scientific and technical services	1,950
Construction	1,560
Other services (except public administration)	790
Accommodation and food services	620
Health care and social assistance	470
Finance, insurance, real estate and leasing	430
Educational services	360
Arts, entertainment and recreation	200
Information and cultural industries	140
Public administration	50
Utilities	0
Agriculture and Natural Resources	0
Others	0
Total	20,380

Source: City of Toronto Employment Survey, 2019

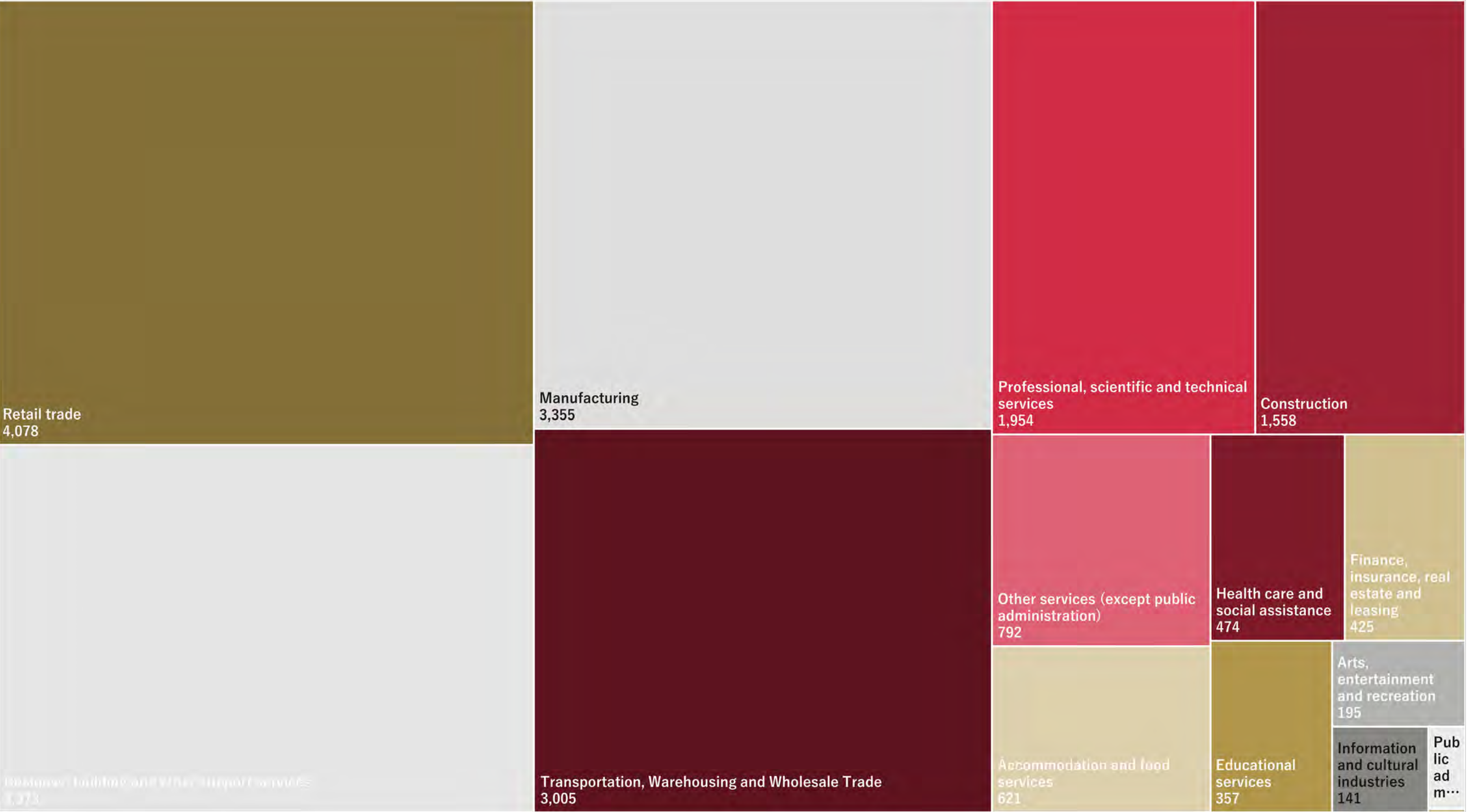


Source: City of Toronto Employment Survey, 2001-2019

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

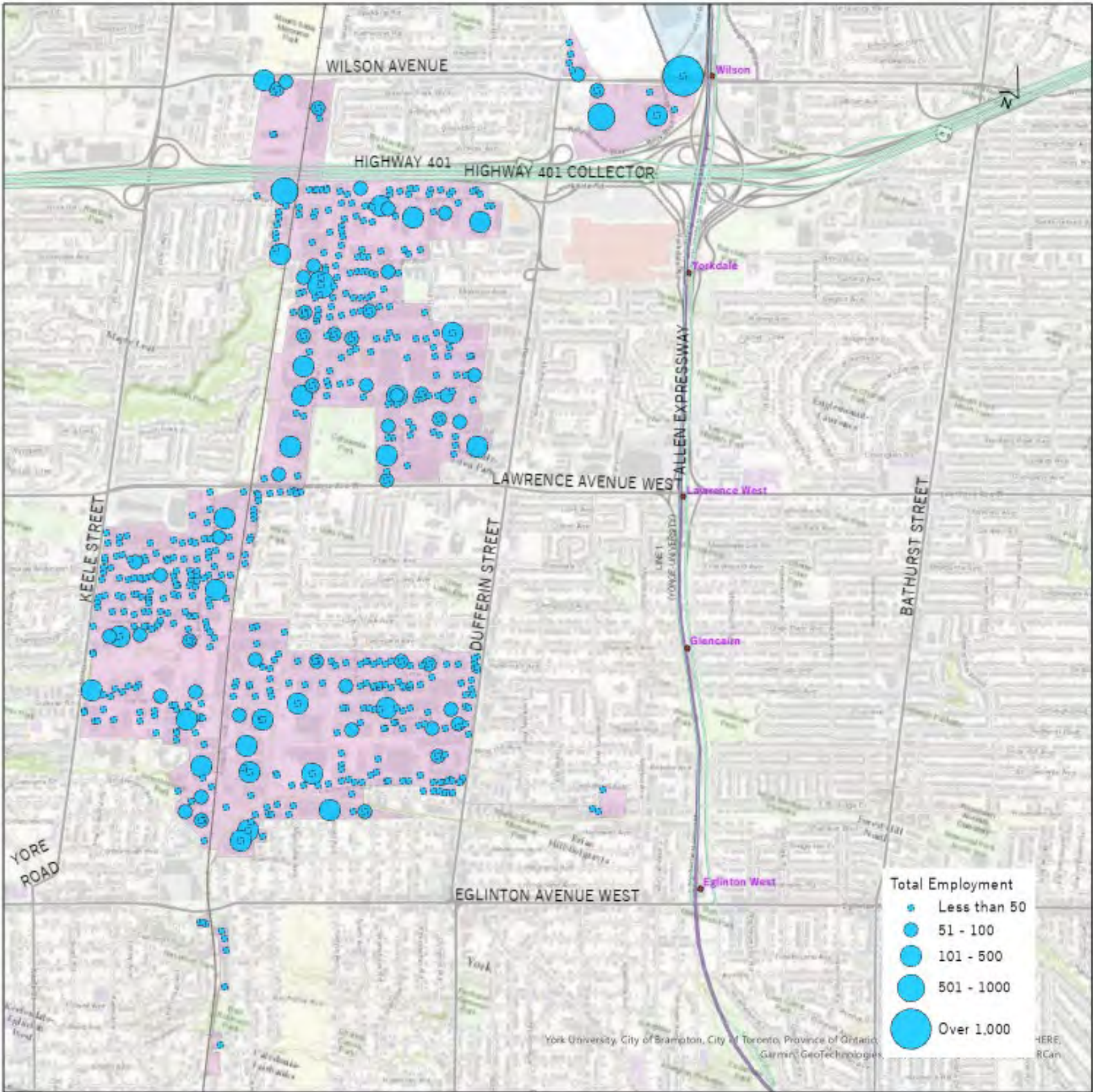
Total Establishments by Industry (NAICS), 2019



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

Source: Toronto Employment Survey, 2019

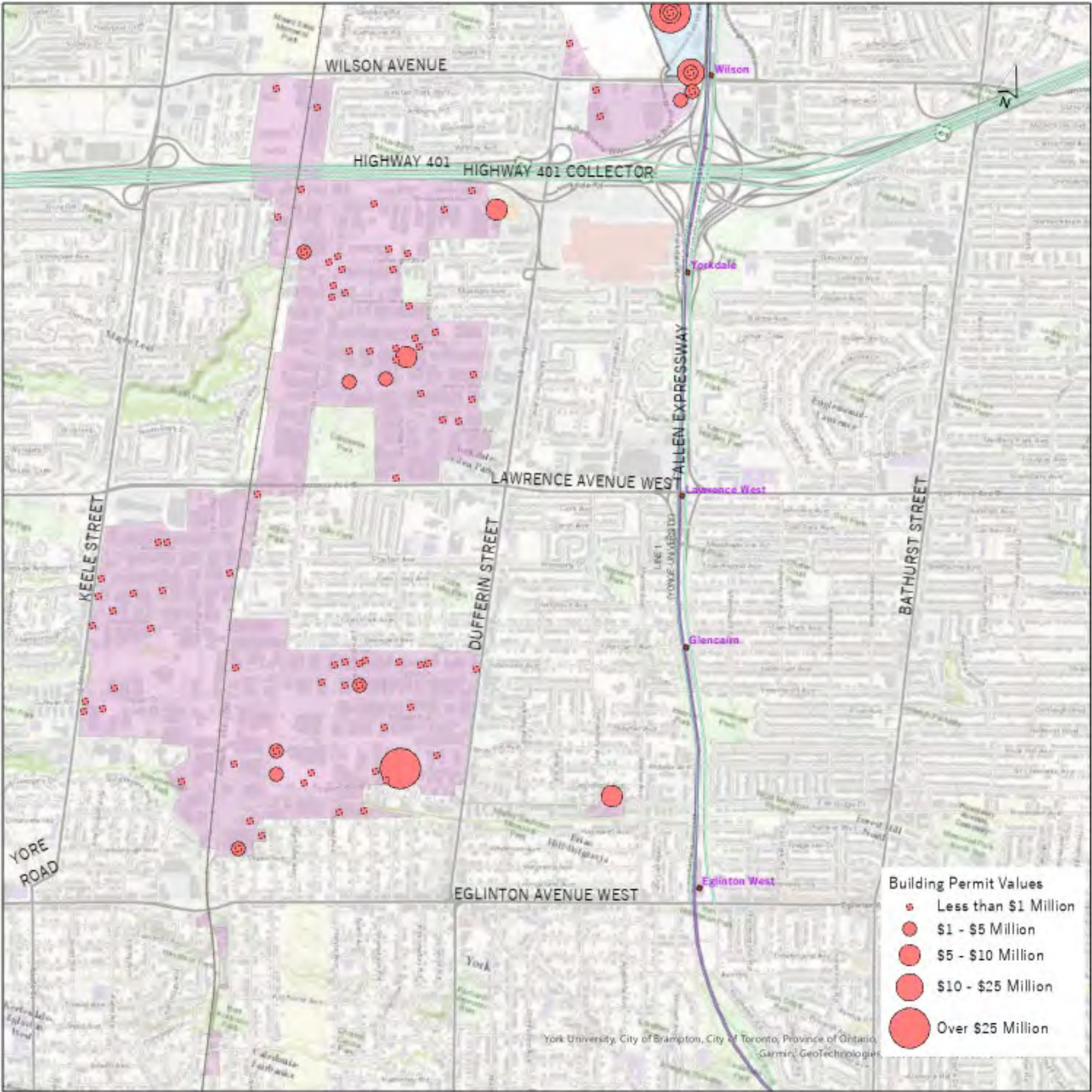
Employment and Establishments in Caledonia – South Downsview Area



Total Employment by Size of Establishment, 2019

Source: City of Toronto Employment Survey

Value of Non-Residential Building Permits, 2016-2019 in Caledonia – South Downsview Area



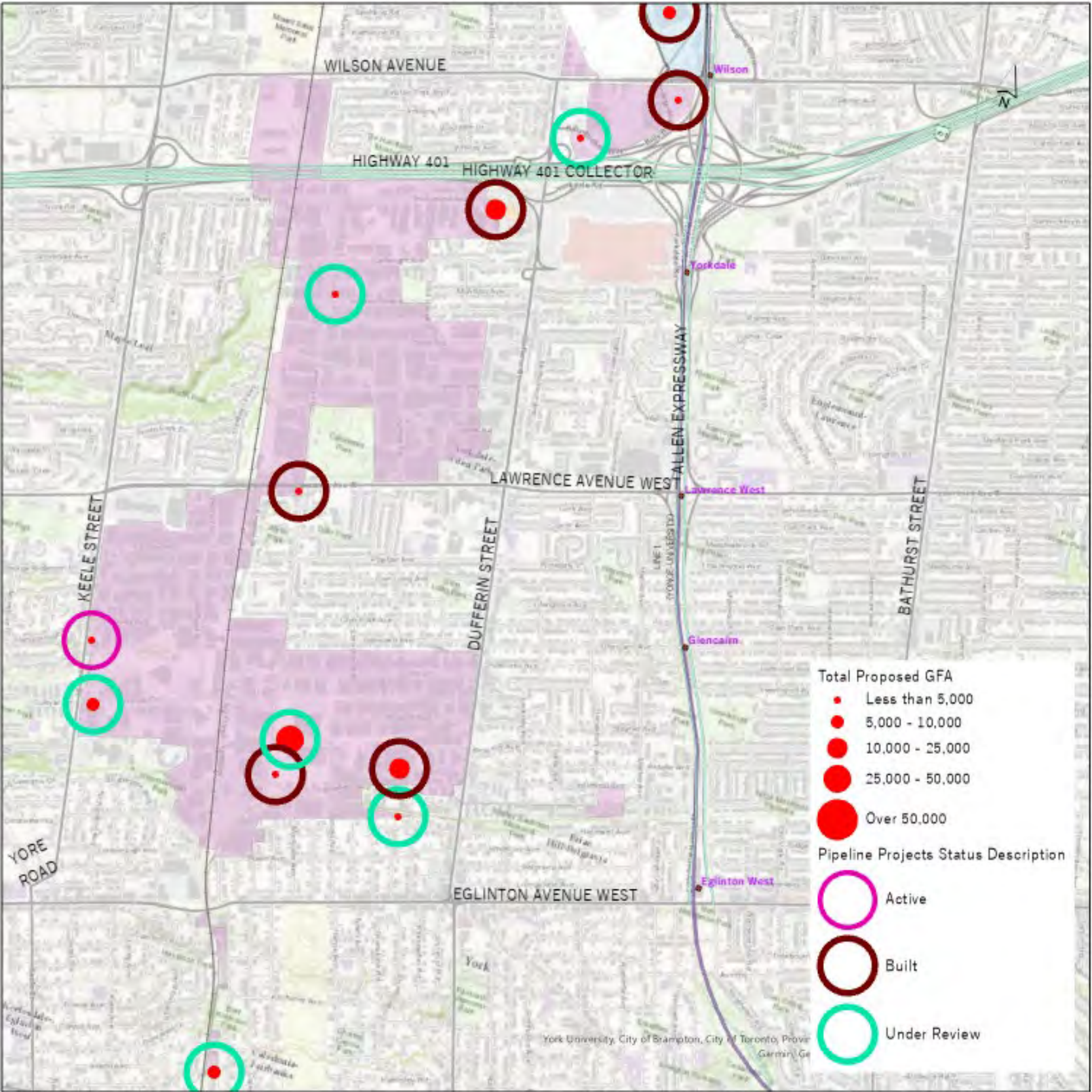
Total Non-Residential Investment (\$000s):	\$116,033
New Building:	\$62,715
Interior Alterations:	\$44,761
Additions:	\$3,097
Multiple Projects:	\$5,370
Demolition:	\$90

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:
83,750 (sq. meters)

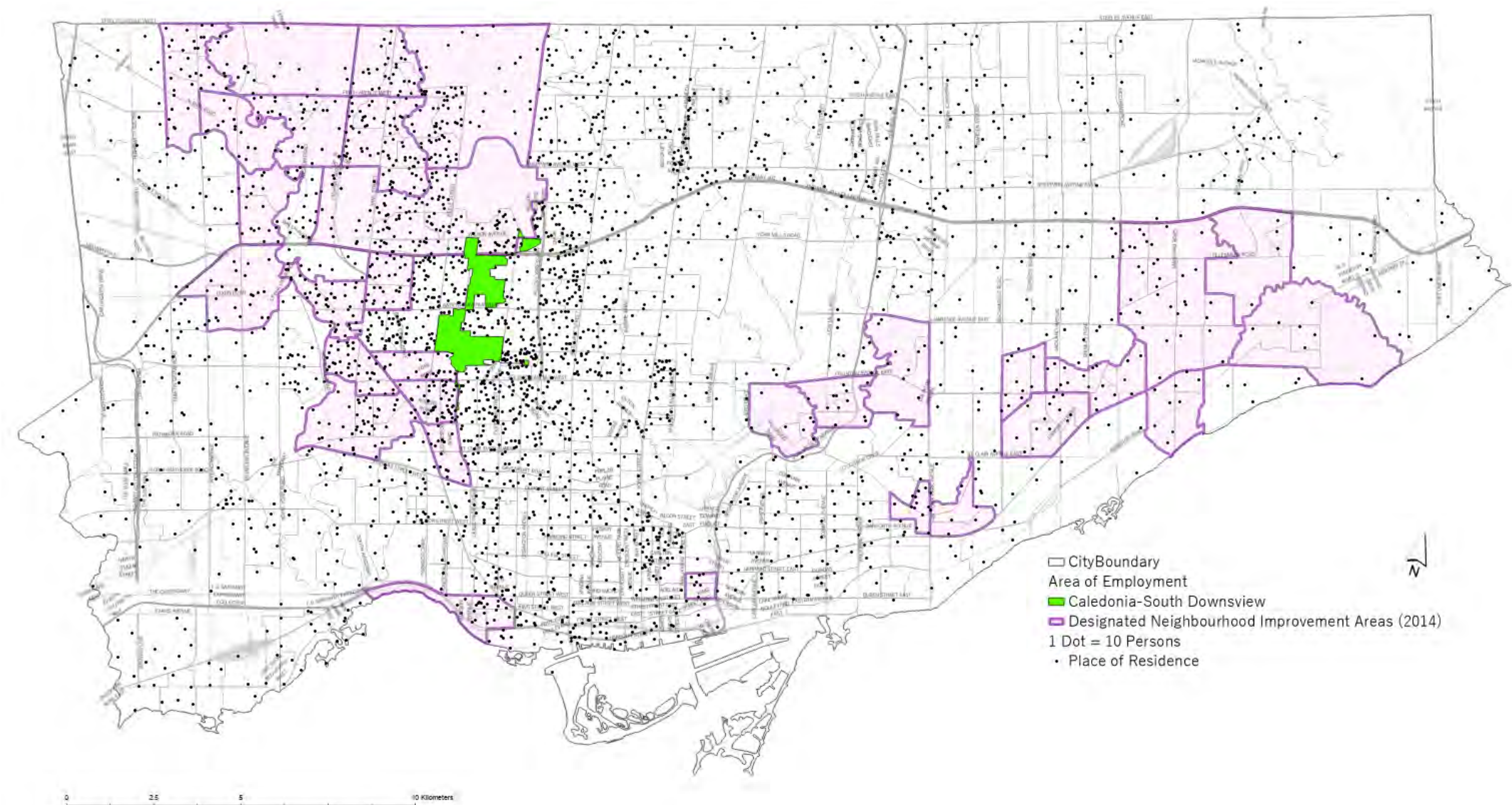
Active: 20
Built: 41,030
Under Review: 42,700

Non-Residential Development Proposals by Status

Source: City of Toronto Development Pipeline

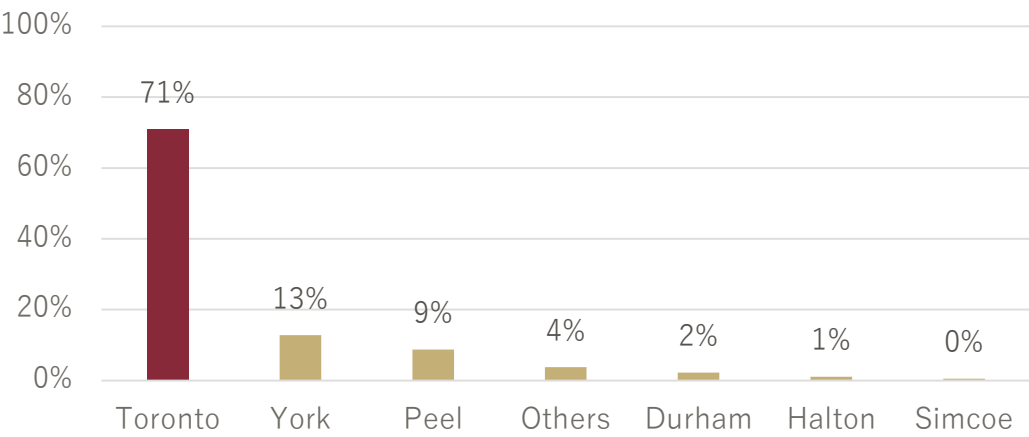


Place of Residence for Workers in Caledonia – South Downsview Area of Employment

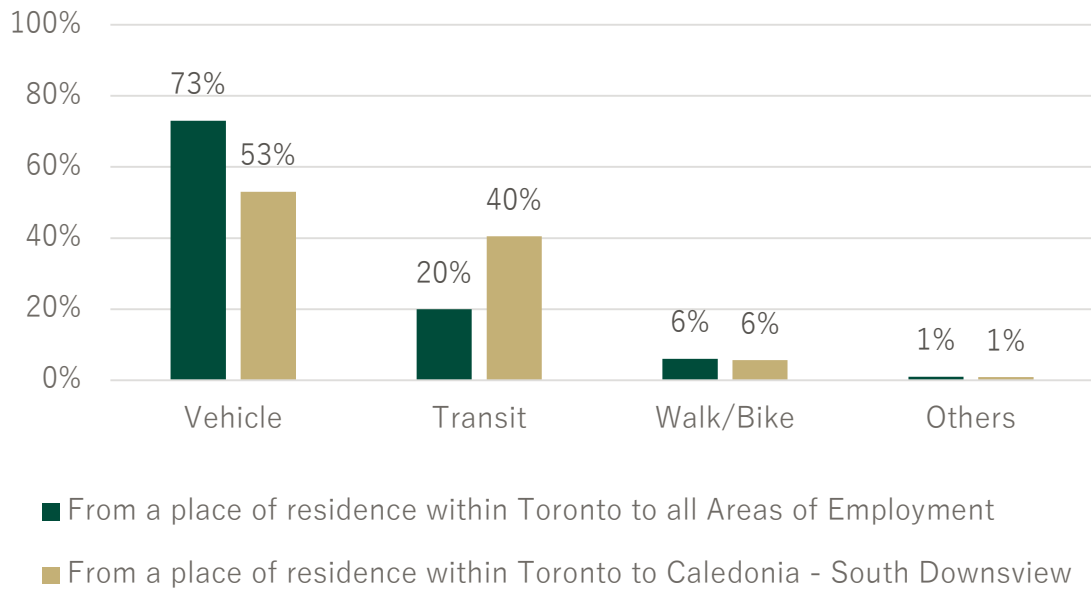


29% of the workforce share residing in Toronto live in Neighbourhood Improvement Areas.

Percent Distribution of Place of Residence



Mode of Transport of Commuters from Within Toronto to All Areas of Employment Compared to Caledonia-South Downsview



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



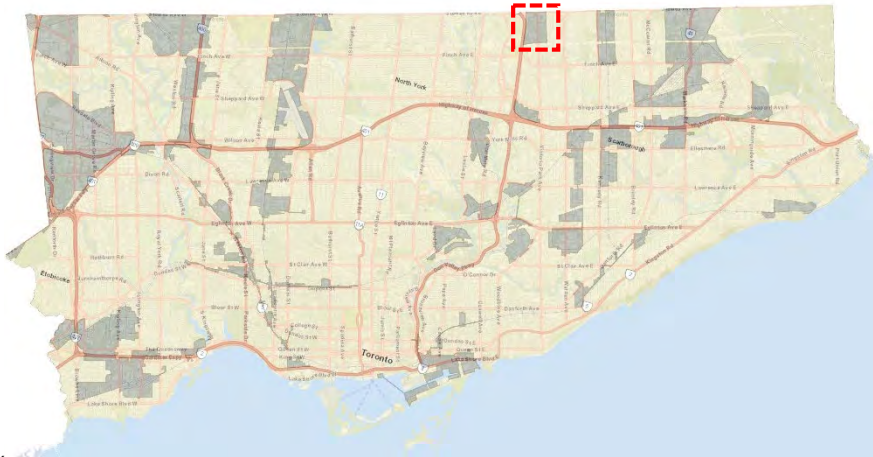
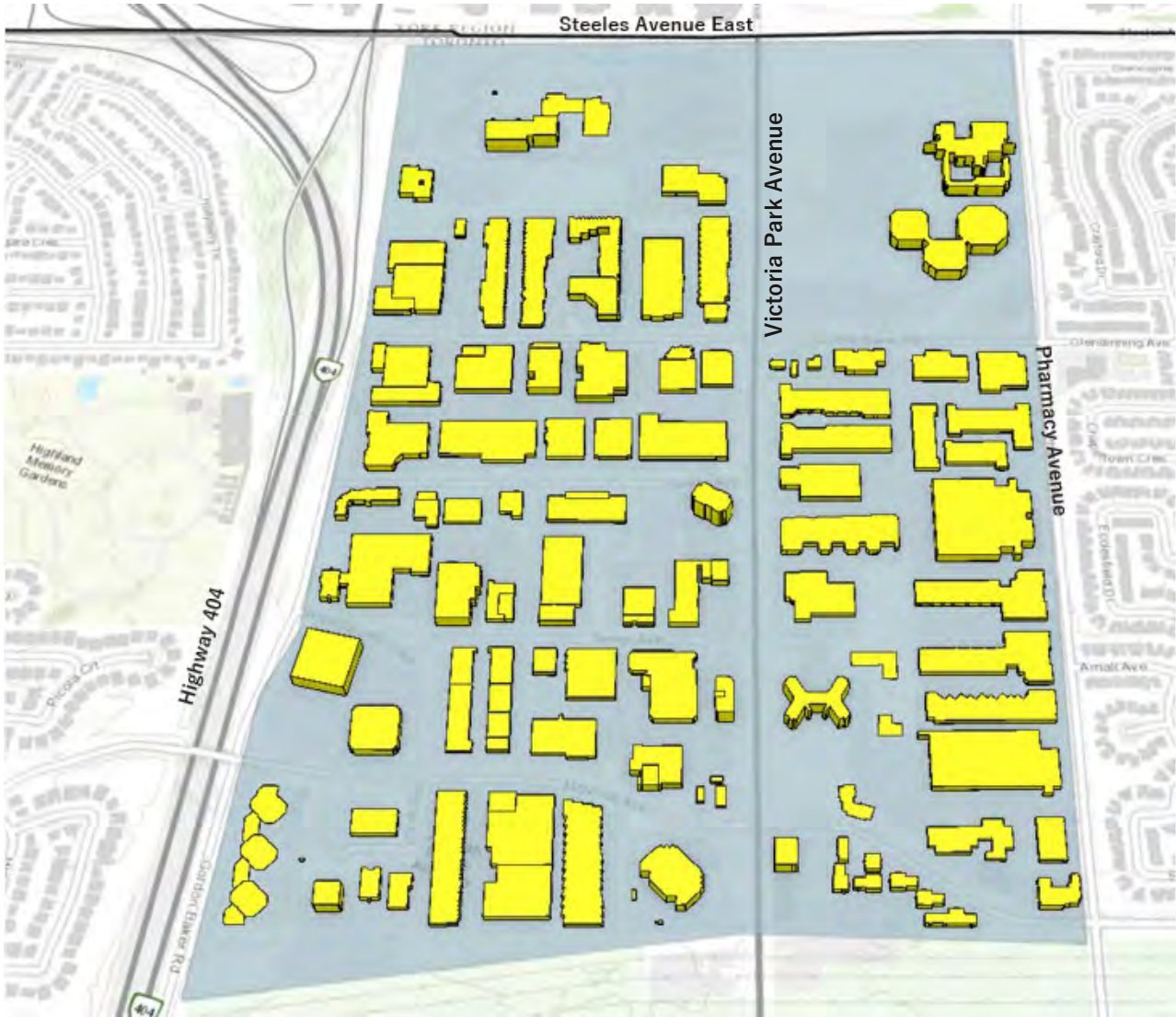
Profile 20

Victoria Park – Steeles Office-Focused Area of Employment

Victoria Park – Steeles Office-Focused Area of Employment

Area Context:

Situated between Highway 404 and Pharmacy Ave., this is one of several auto-oriented office nodes in the DVP / Hwy. 404 corridor. More recently built-out, the Victoria Park – Steeles node features more modern inventory.



Key Map

Function & Focus

- The 6.4 million square feet of office inventory makes this the largest of the office-focused areas of employment with adjacency to Highway 404.
- 60% of the inventory is Class B, while 30% is Class A with a mix of corporate and private occupiers.
- The 13,800 jobs in 2019 represents a modest recovery (1,300) following a decline of 3,600 from 2006 to 2011.
- 37% of all jobs are in Finance, Insurance & Real Estate, while 11% are in Professional, Scientific & Technical Services, and 8% are Information and Culture jobs.
- 16% of all Toronto jobs in the broader Finance industry within the areas of employment are found here.
- The employment density here is estimated at about 106 jobs per hectare over the 130 hectares of employment land.
- \$136 million was invested in construction and alterations of projects over the past five years, and there is over 84,000 square metres of new development in the pipeline.
- Of the 52% of workers in this office-focused area of employment who live within the City of Toronto, 31% chose a low-carbon mode of travel to work: 29% use transit, while 2% walk or bicycle.
- 16% of these workers reside in Neighbourhood Improvement Areas.

Key Facts:

Total Land Area (Net Ha)	129.8 ha
Total Employment	13,839
Total Establishments	454
Rentable Building Area**(Industrial)	3.06 million sft.
Vacancy Rate(2021)	2.2 %
Employment Density (Net jobs/ha)	106.3

** Source: CoStar Group, www.costar.com

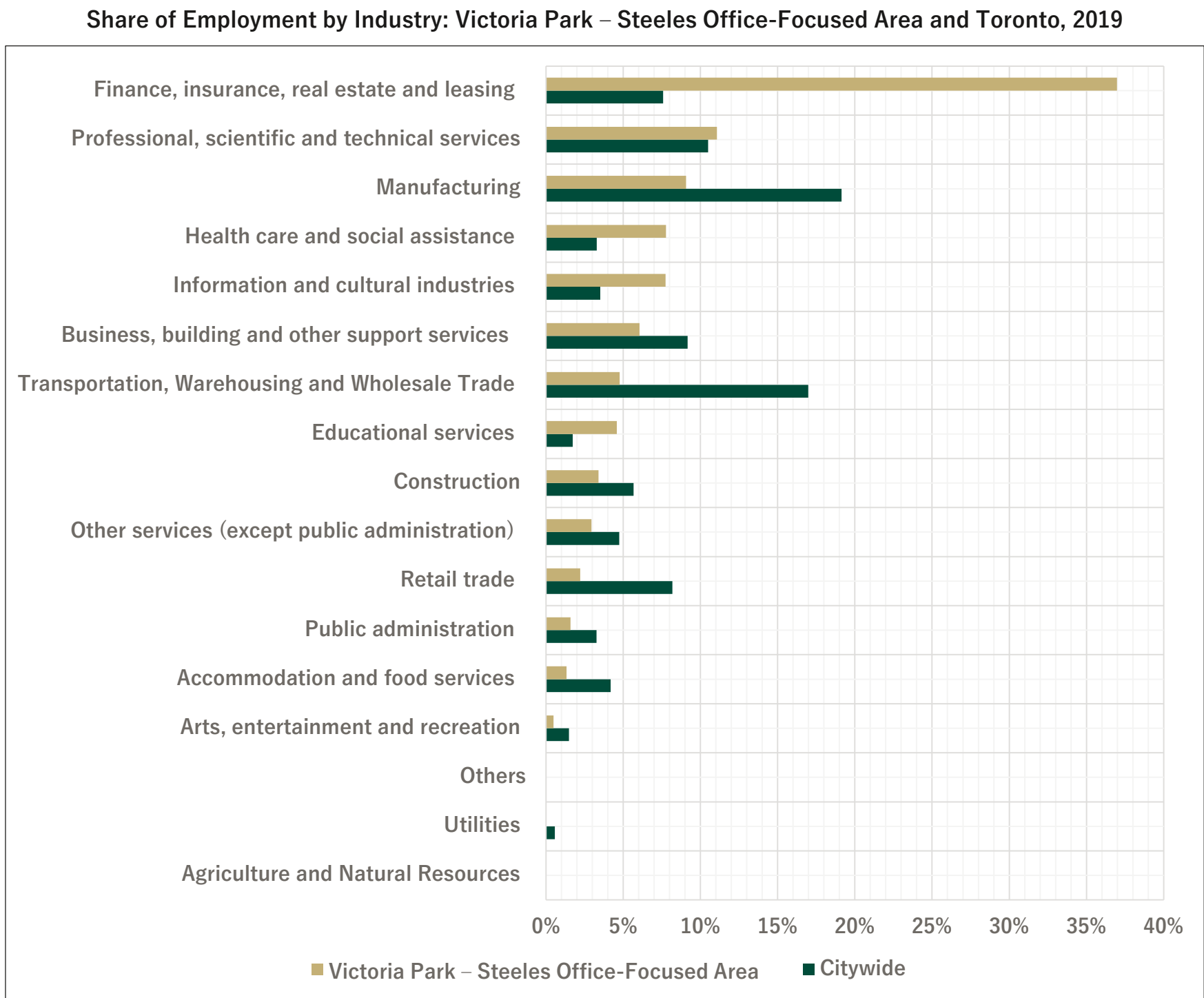
Top Employers:

- BMO
- Tangerine
- TD Insurance
- Paramed
- Dell Computer Corp

Outlook

- The Class A product is more competitive than the older stock and, in fact, larger tenants have migrated from older buildings to the Class A stock.
- While this area will continue to compete with office space in Markham and Richmond Hill, the Class B stock presents an affordable option with a Toronto address.
- Conversion pressure is not perceived as significant as compared to office nodes to the south.

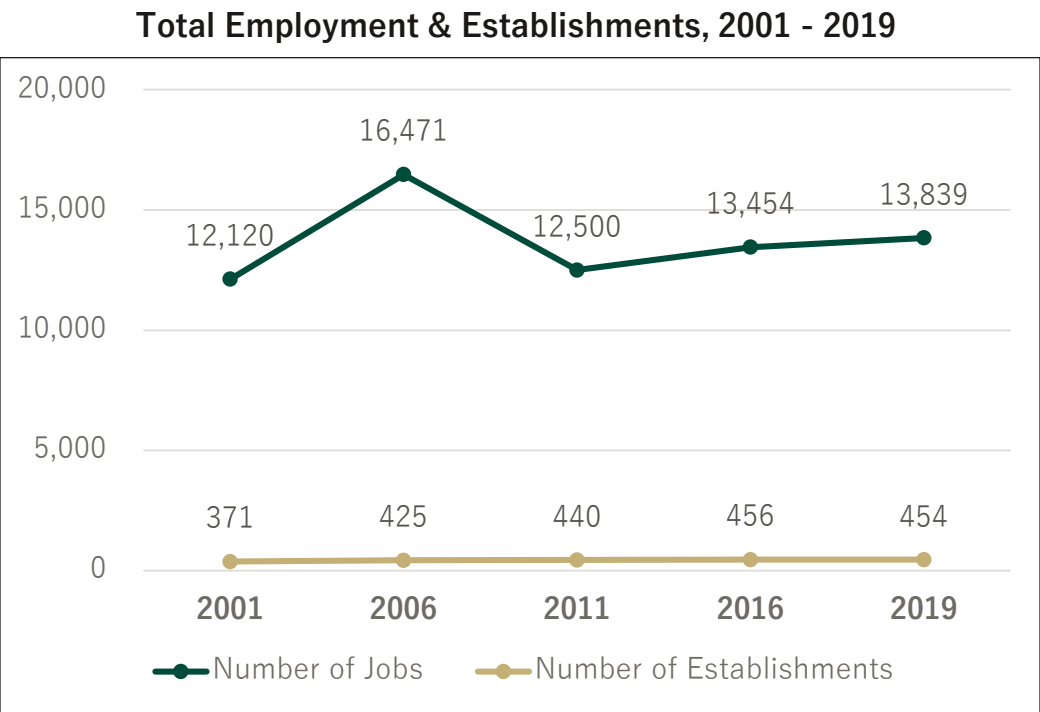
Share of Employment by Industry: Victoria Park – Steeles Office-Focused Area and Toronto, 2019



Source: City of Toronto Employment Survey, 2019

NAICS Categories	Number of Jobs
Finance, insurance, real estate and leasing	5,120
Professional, scientific and technical services	1,530
Manufacturing	1,250
Health care and social assistance	1,080
Information and cultural industries	1,070
Business, building and other support services	840
Transportation, Warehousing and Wholesale Trade	660
Educational services	640
Construction	470
Other services (except public administration)	410
Retail trade	310
Public administration	220
Accommodation and food services	180
Arts, entertainment and recreation	70
Agriculture and Natural Resources	0
Utilities	0
Others	0
Total	13,840

Source: City of Toronto Employment Survey, 2019

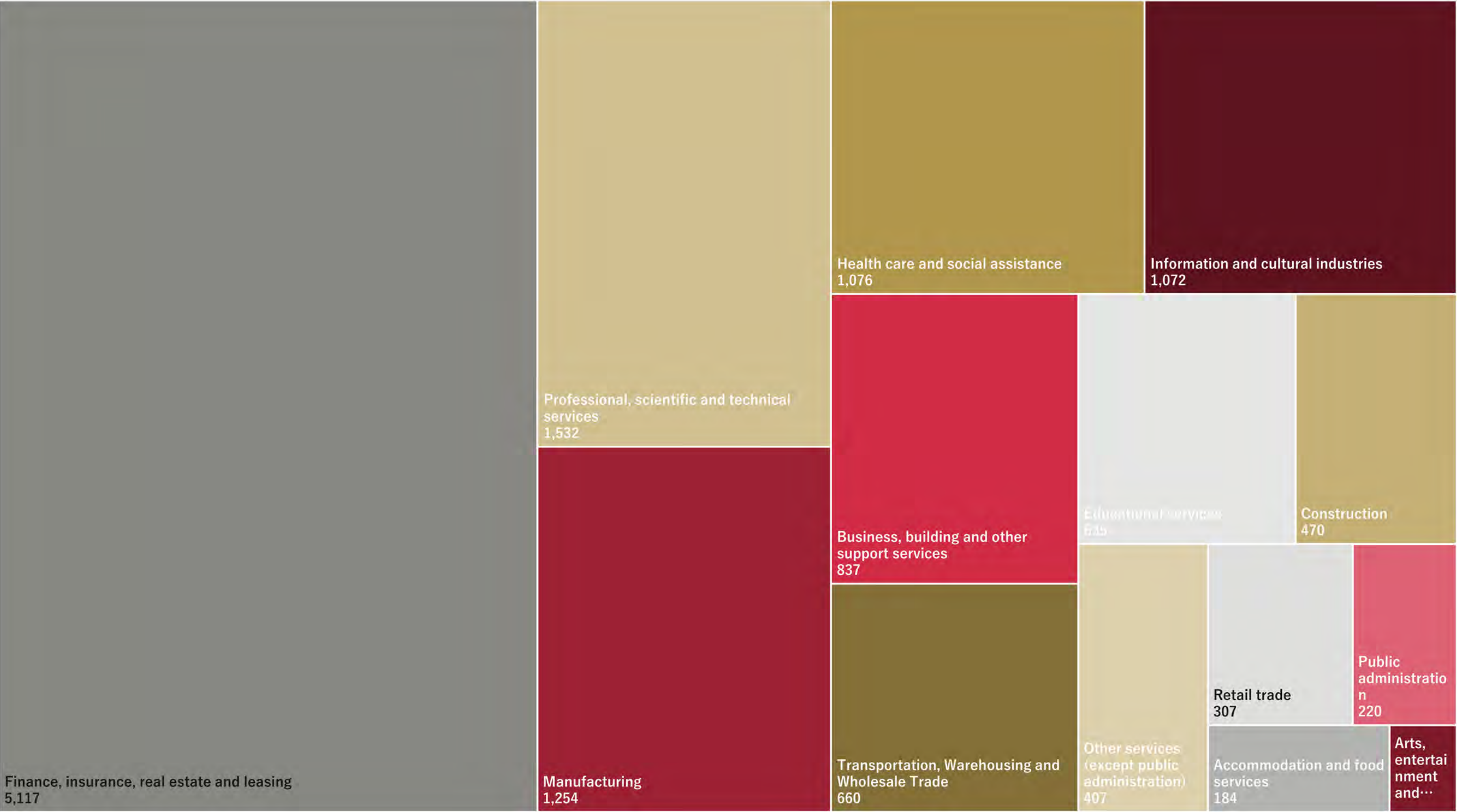


Source: City of Toronto Employment Survey, 2011-2019

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Total Employment by Industry (NAICS), 2019:

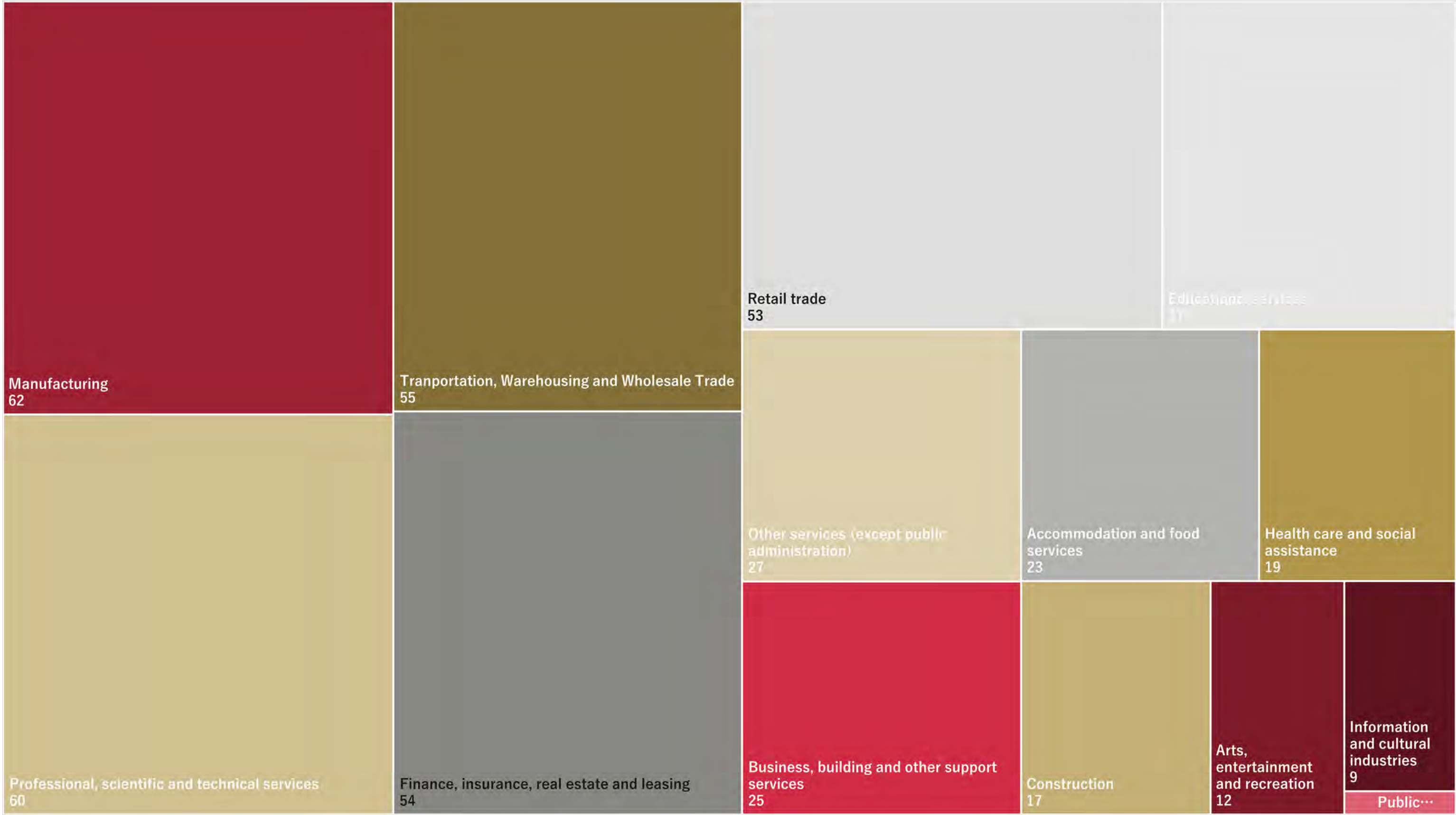


*NAICS: "North American Industry Classification System, v 3.0 2017

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 Victoria Park – Steeles Office-Focused Area



Total Employment by Size of Establishment, 2019

Source: City of Toronto Employment Survey



Value of Non-Residential Building Permits, 2016-2019 in Victoria Park – Steeles Office-Focused Area



Total Non-Residential Investment

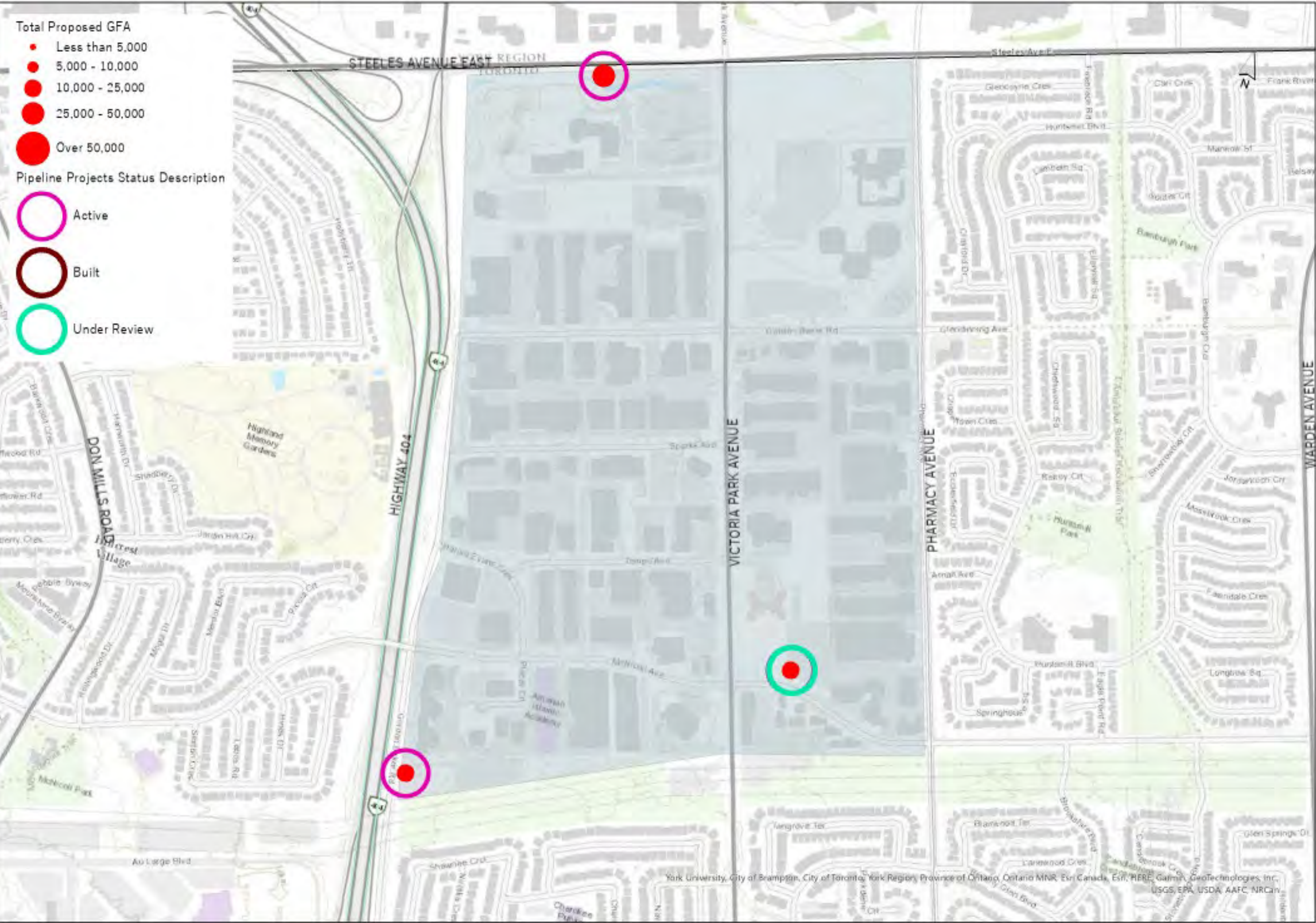
(\$000s):	\$135,698
New Building:	\$72,665
Interior Alterations:	\$56,158
Additions:	\$2,600
Multiple Projects:	\$4,275
Demolition:	\$0

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: 84,160 (sq. meters)

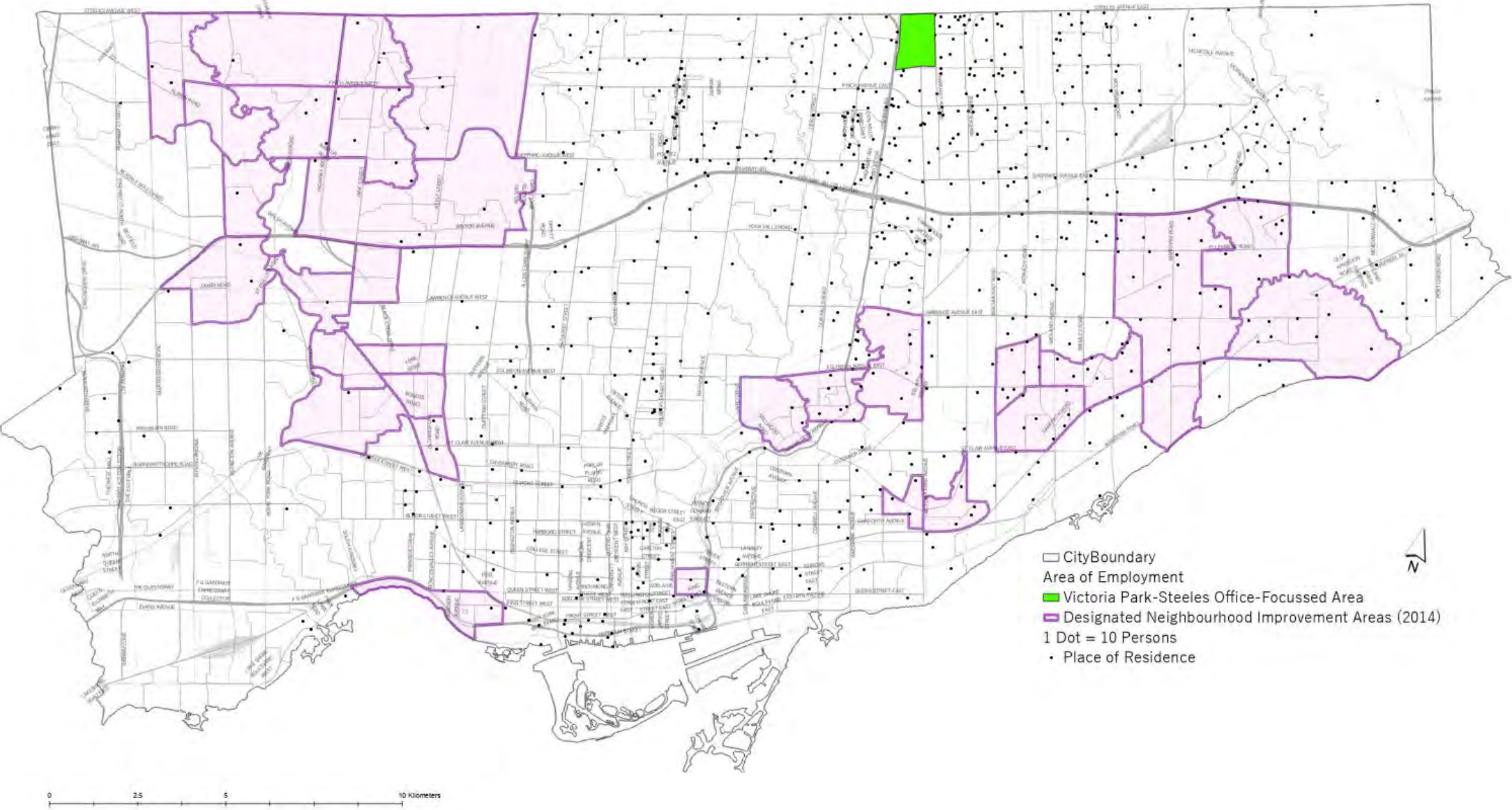
Active:	83,020
Built:	0
Under Review:	1,140

Non-Residential Development Proposals by Status

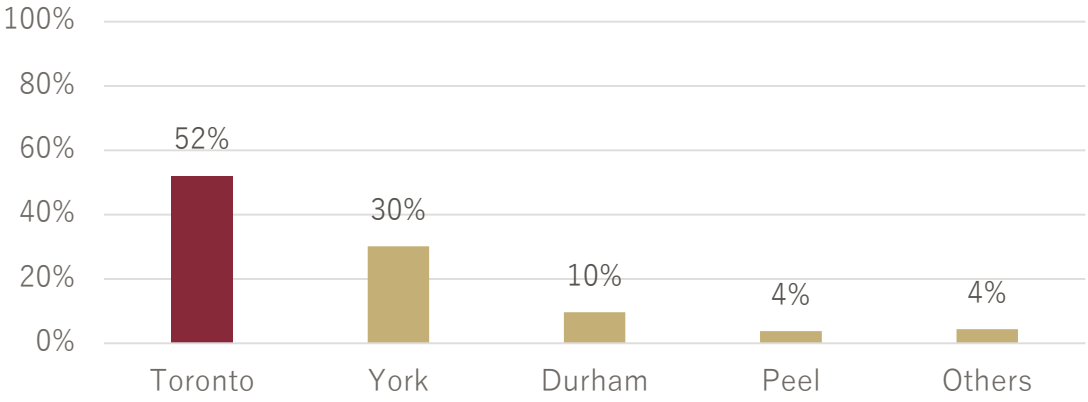
Source: City of Toronto Development Pipeline



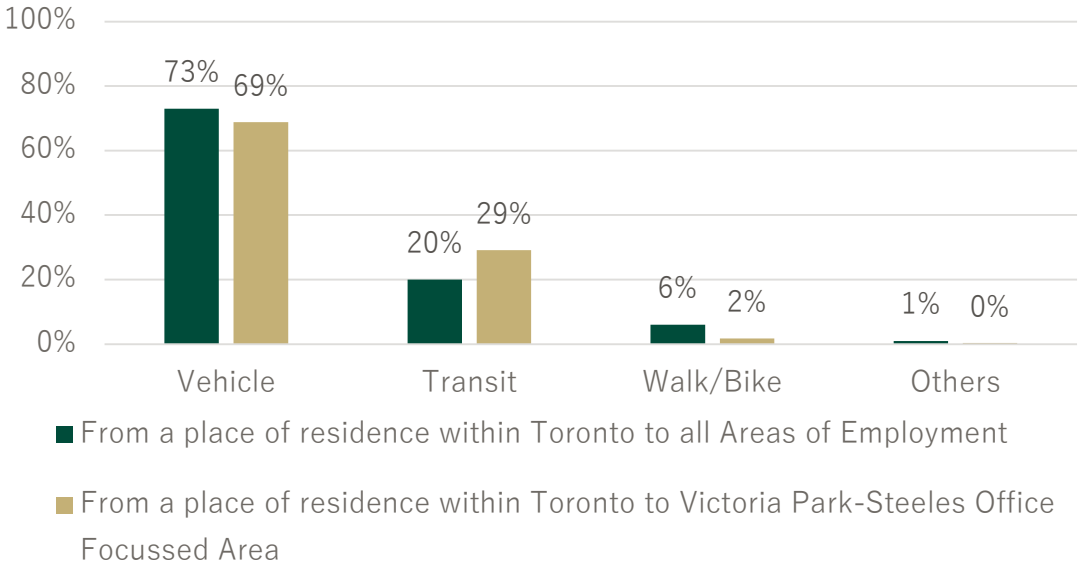
Place of Residence for Workers in Victoria Park – Steeles Office-Focused Area of Employment



Percent Distribution of Place of Residence



Mode of Transport of Commuters from Within Toronto to All Areas of Employment Compared to Victoria Park-Steeles Office



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



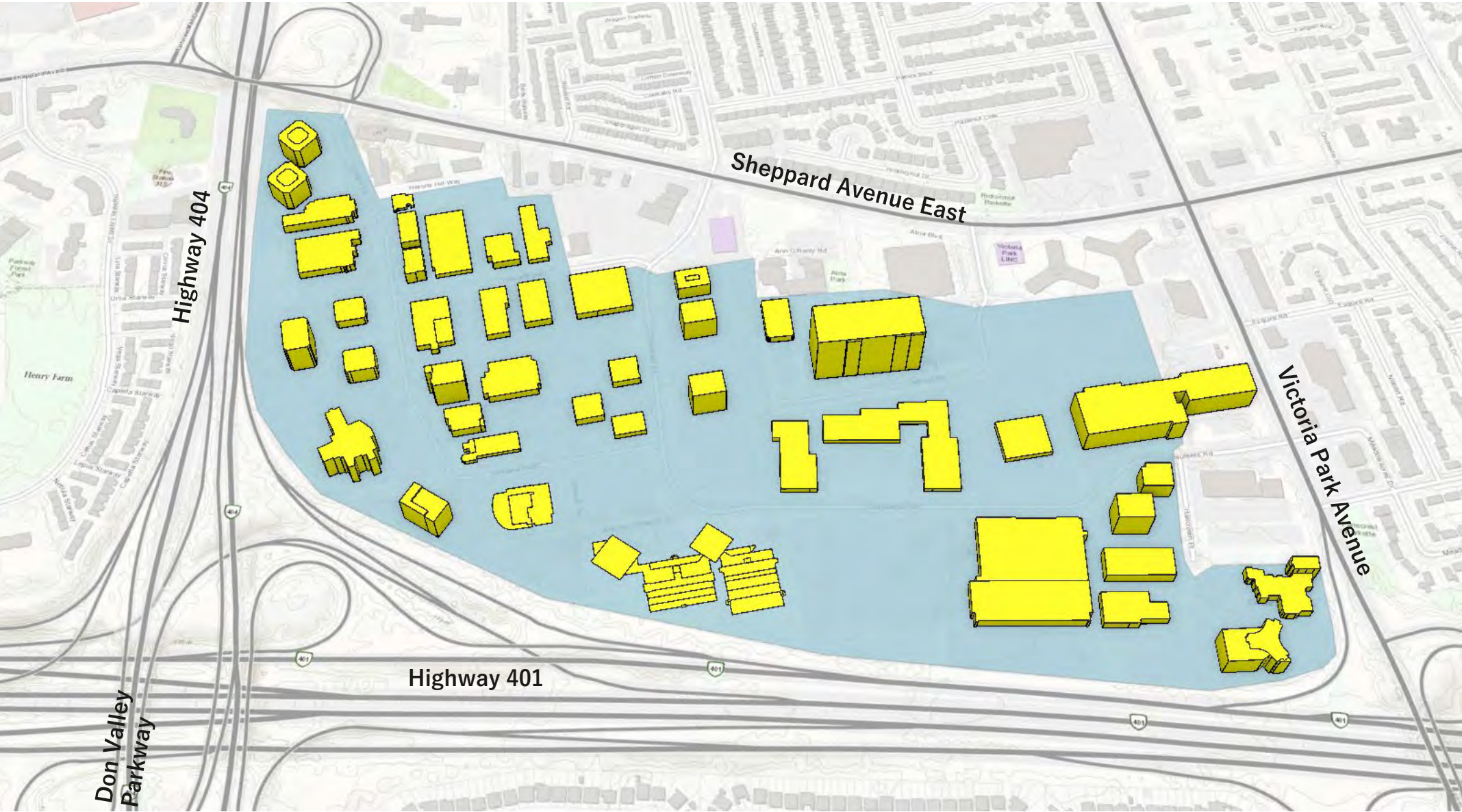
Profile 21

Consumers Road Office-Focused Area of Employment

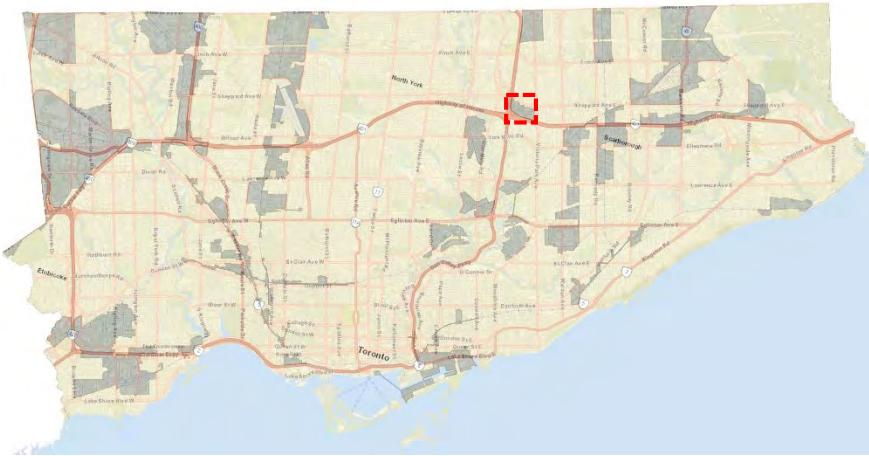
Consumers Road Office-Focused Area of Employment

Area Context:

The Consumers Road area is an office park largely built during the 1970s and 1980s at the confluence of Highways 401 (on the south) and 404 (on the west). It offers excellent visibility and access for firms and employees with higher parking ratios and good transit service, and enjoys almost immediate access to ramps for these highways.



Source: City of Toronto 3D Massing



Key Map

Key Facts:

Total Land Area (Net Ha)	54.5
Total Employment	18,515
Total Establishments	601
Rentable Building Area**(Industrial)	0.57 million sft.
Vacancy Rate(2021)	0 %
Employment Density (Net jobs/ha)	339.9

** Source: CoStar Group, www.costar.com

Top Employers:

- American Express
- Shoppers Drug Mart
- Securitas Canada
- Enbridge Gas
- Homelife New World Realty

Consumers Road Office-Focused Area North



Source: City of Toronto 3D Massing

Function & Focus

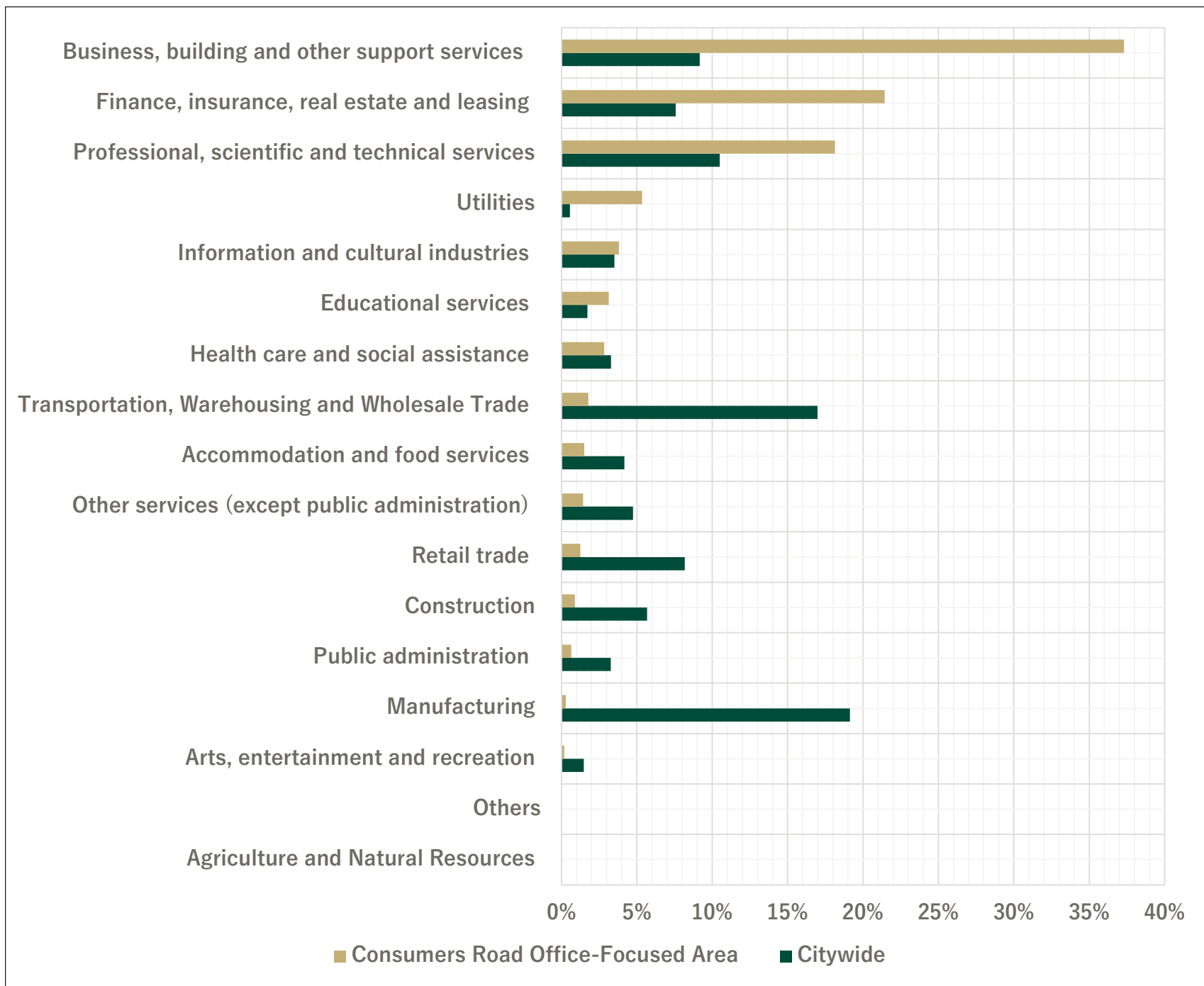
- The 4.5 million square feet of office inventory is largely Class B space (45%) while 27% is Class A.
- There is a mix of high quality, multi-national companies in the Class A towers and smaller, private companies in the Class B/C towers.
- The 18,500 jobs (600 establishments) in 2019 is a result of consistent strong growth since 2006.
- 37% of all jobs are in Business and Other Support Services, and 21% are in Finance, Insurance & Real Estate, while 18% are in Professional, Scientific & Technical Services.
- Growth since 2011 has largely been in these sectors, while jobs in Information and Cultural firms has declined.
- 18% of all Toronto Business Support industry located in areas of employment are found here.
- The employment density here is estimated at about 340 jobs per hectare over the 55 hectares of employment land.
- \$70 million was invested in construction and alterations of projects over the past five years, including the Porsche Canada head office and dealership.
- Of the 56% of workers in this office-focused area who live within the City of Toronto, 33% chose a low-carbon mode of travel to work: 29% use transit, while 4% walk or bicycle.
- 16% of these workers reside in Neighbourhood Improvement Areas.

Outlook

- The big benefit of this node is the mix of transit available and the higher parking ratios, including free parking (except for the Class A towers).
- The ConsumersNext Secondary Plan is now in force and will guide future development in the area. The vision is for this area to continue as an important location for business and a vibrant destination for employees. The area will benefit from the future construction of higher-order transit along Sheppard Avenue.
- Consumers Road should outperform other nodes along the Don Valley Parkway / Highway 404 due to multiple highway access points and the availability of public transit.
- The outlook remains positive relative to the nodes to the south, provided that landlords invest in their buildings to upgrade to modern space requirements.

Share of Employment by Industry: Consumers Road Office-Focused Area and Toronto, 2019

Share of Employment by Industry: Consumers Road Office-Focused Area and Toronto, 2019

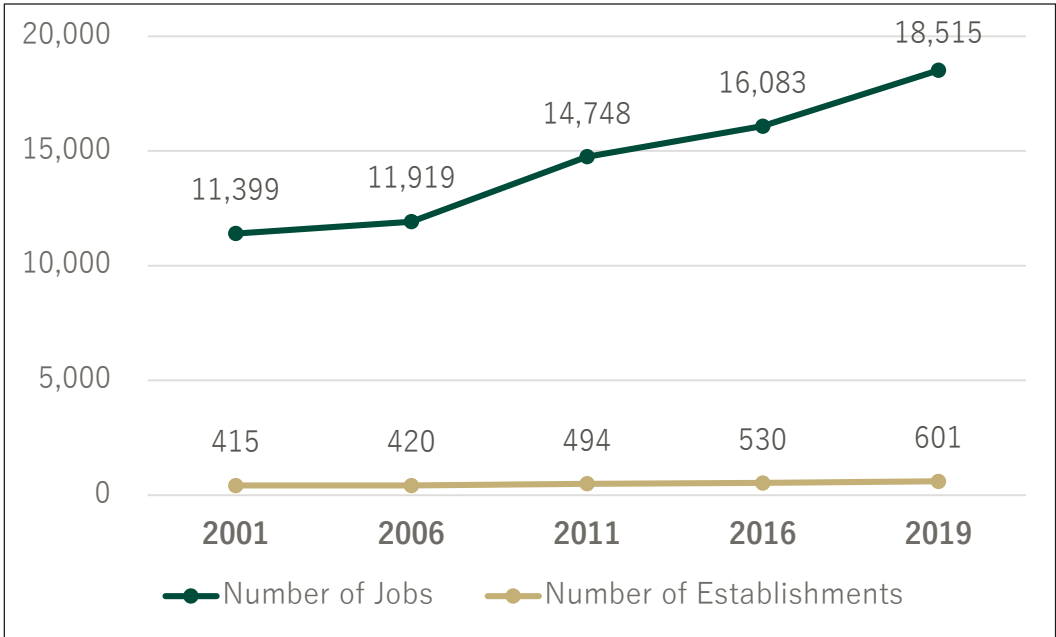


Source: City of Toronto Employment Survey, 2019

NAICS Categories	Number of Jobs
Business, building and other support services	6,910
Finance, insurance, real estate and leasing	3,970
Professional, scientific and technical services	3,360
Utilities	990
Information and cultural industries	710
Educational services	580
Health care and social assistance	520
Transportation, Warehousing and Wholesale Trade	330
Accommodation and food services	280
Other services (except public administration)	270
Retail trade	230
Construction	170
Public administration	120
Manufacturing	60
Arts, entertainment and recreation	40
Agriculture and Natural Resources	0
Others	0
Total	18,520

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



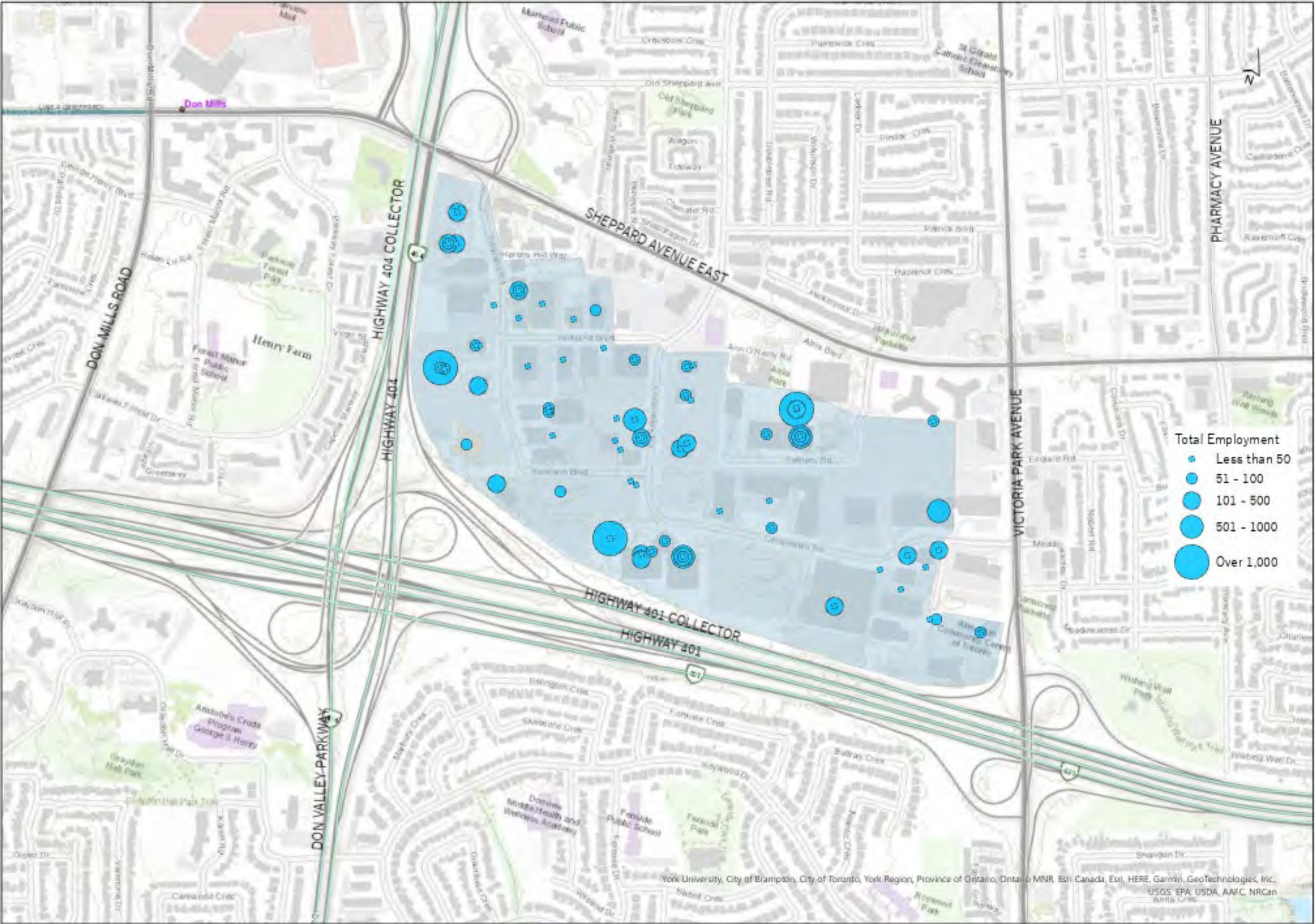
Total Establishments by Industry (NAICS), 2019:



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

Source: Toronto Employment Survey, 2019

Employment and Establishments in Consumers Road Office-Focused Area

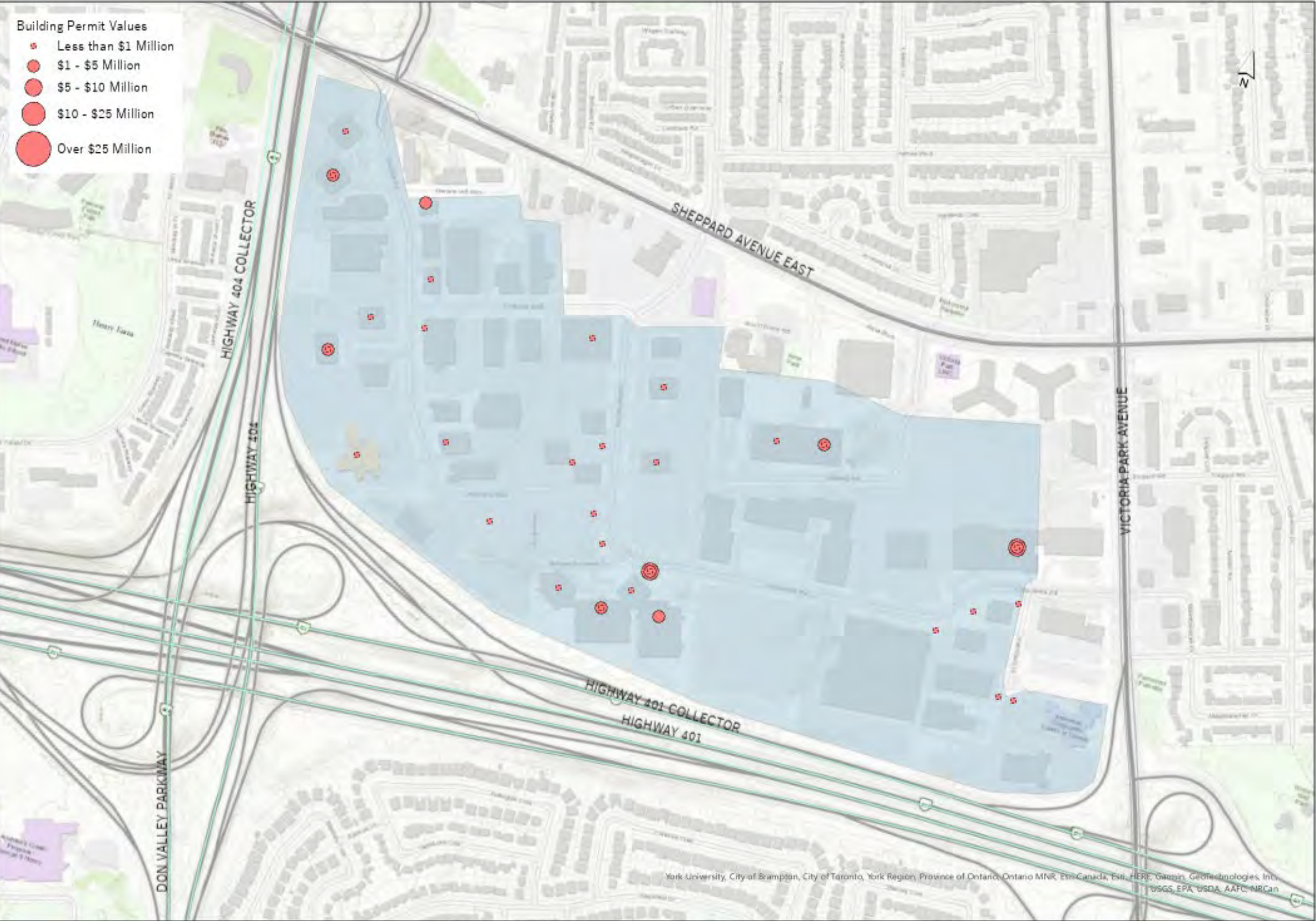


Total Employment by Size of Establishment, 2019

Source: City of Toronto Employment Survey



Value of Non-Residential Building Permits, 2016-2019 in Consumers Road Office-Focused Area



Total Non-Residential Investment

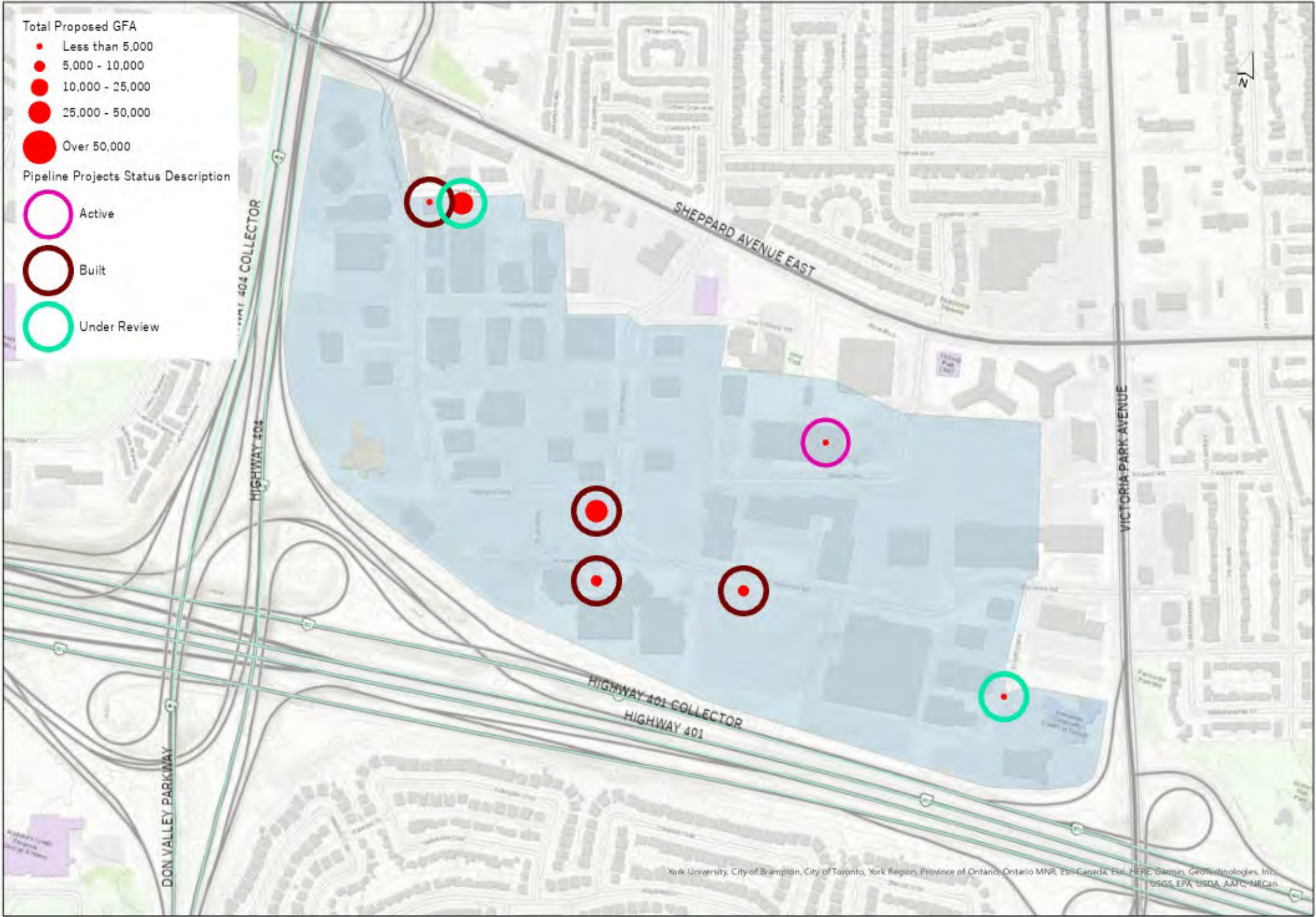
(\$000s):	\$70,703
New Building:	\$1,050
Interior Alterations:	\$61,868
Additions:	\$0
Multiple Projects:	\$7,785
Demolition:	\$0

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:
83,100 (sq. meters)

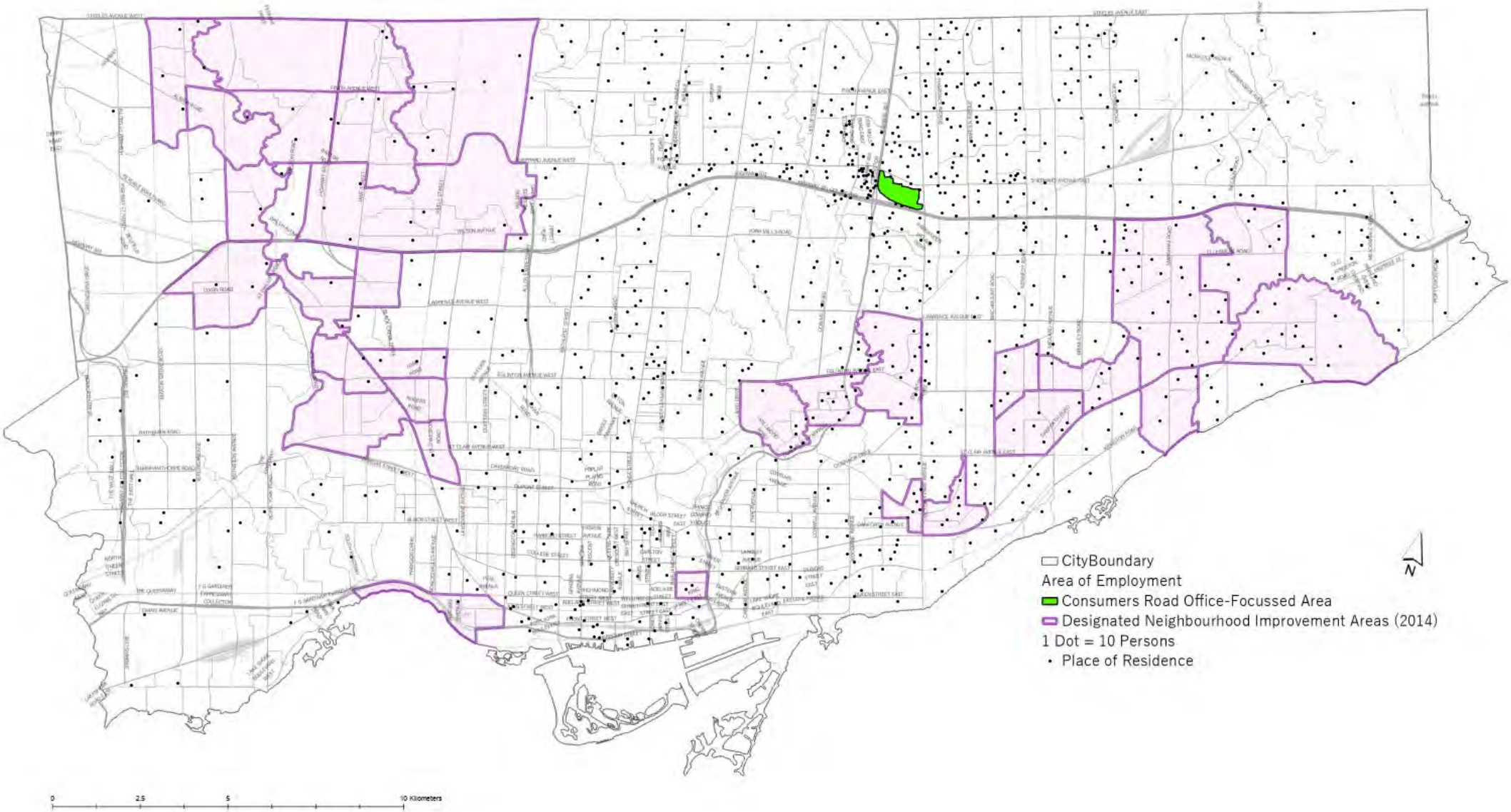
Active:	400
Built:	55,020
Under Review:	27,680

Non-Residential Development Proposals by Status

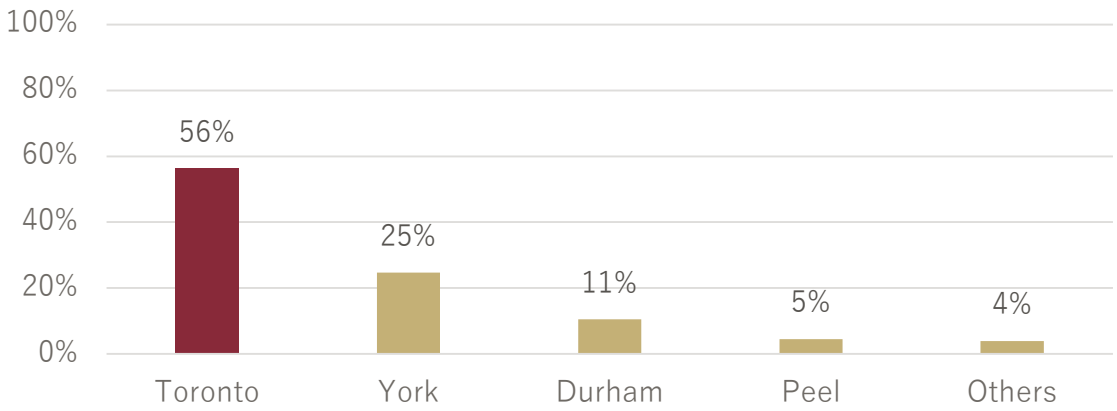
Source: City of Toronto Development Pipeline



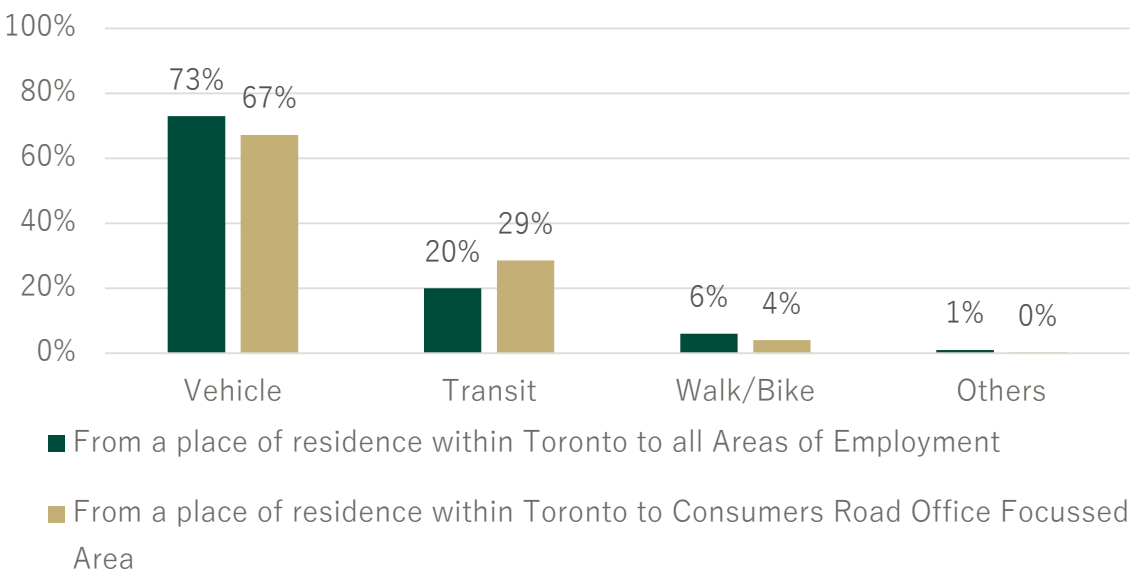
Place of Residence for Workers in Consumers Road Office-Focused Area of Employment



Percent Distribution of Place of Residence



Mode of Transport of Commuters from Within Toronto to All Areas of Employment Compared to Consumers Road Office



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



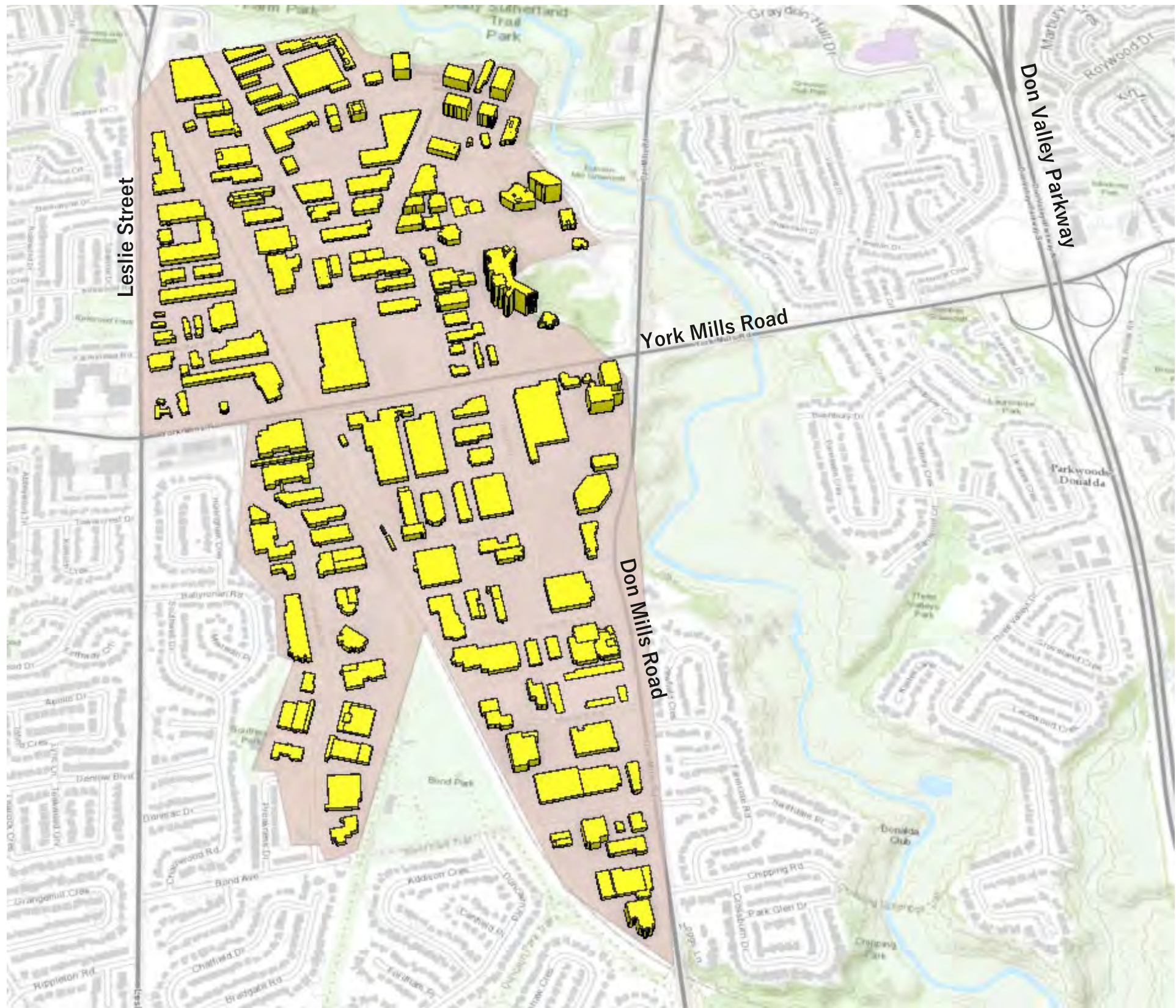
Profile 22

Duncan Mill Office-Focused Area of Employment

Duncan Mill Office-Focused Area of Employment

Area Context:

Duncan Mill is an office business park south of Highway 401 at Leslie Street where 70% of the office inventory was built during the 1970s and 1980s.



Source: City of Toronto 3D Massing



Key Map

Key Facts:

Total Land Area (Net Ha)	127.2 ha
Total Employment	20,270
Total Establishments	803
Rentable Building Area**(Industrial)	1.02 million sft.
Vacancy Rate(2021)	5.2 %
Employment Density (Net jobs/ha)	159.4

** Source: CoStar Group, www.costar.com

Top Employers:

- Right at Home
- Thales Canada Transportation Solutions
- Toronto Police Service
- Gatestone & Co.
- Rogers Media



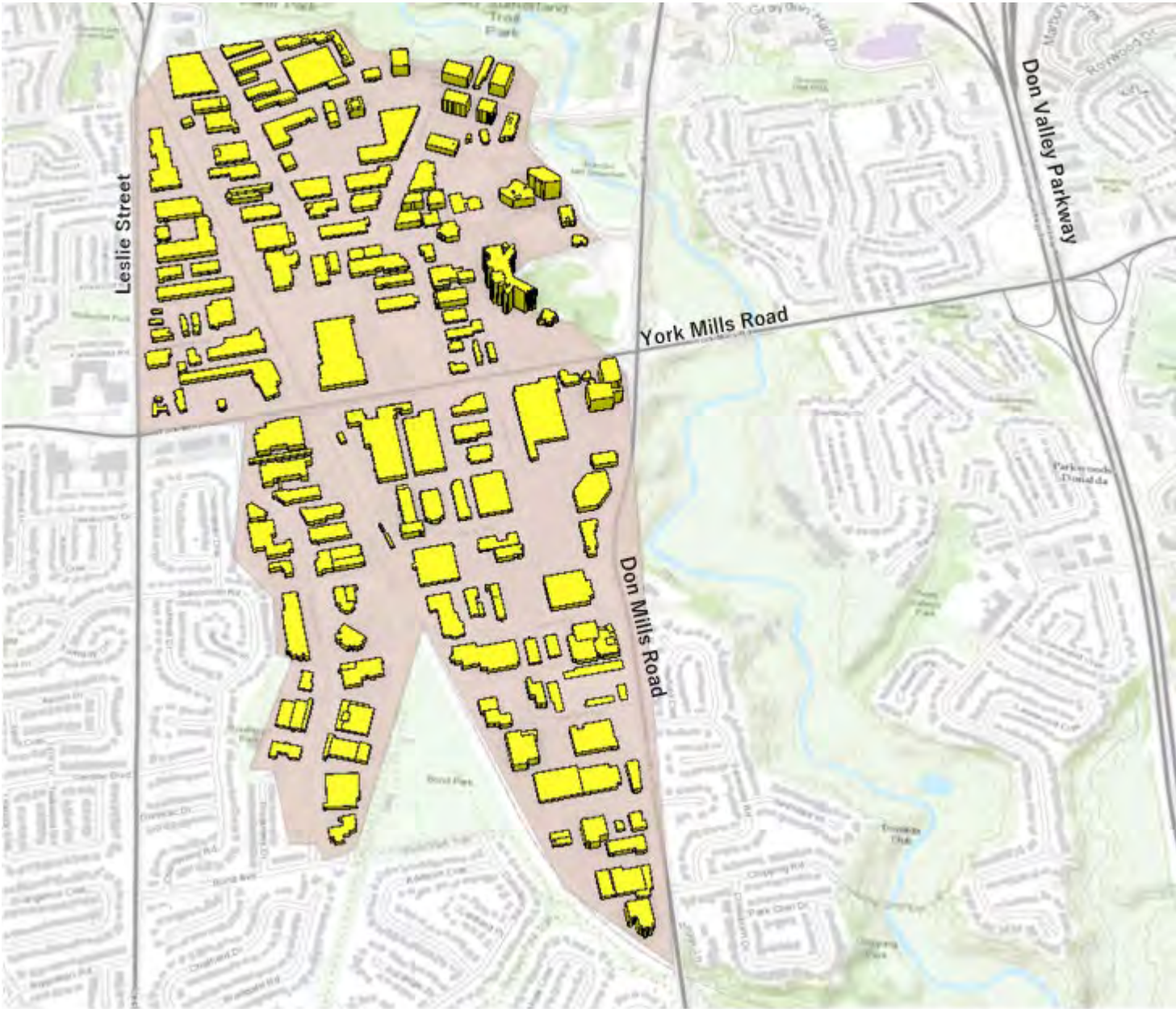
Duncan Mill Office-Focused Area North

Function & Focus

- The 2.4 million square feet of office inventory has a persistently high vacancy rate. It is largely Class B space (45%) while only 17% is Class A.
- While there are lots of amenities along York Mills, it is still a driver’s submarket, with limited parking ratios based on old building standards (when large private offices were the norm). Few tenants occupy more than a single floor.
- Tenants struggle to operate at 3 parking spaces per 1,000 square feet of office space.
- There are fewer ‘corporate’ tenants here. The area is suited to private businesses, high net worth, and entrepreneurial-type occupancies, partly resulting from its proximity to affluent residential neighbourhoods in North Toronto.
- The 20,000 jobs (800 establishments) in 2019 represents a slight decline over the count in 2016. However, today there are 2,800 more people working here than there was in 2001.
- 22% of all jobs are in Finance, Insurance & Real Estate, while 19% are in Professional, Scientific & Technical Services.
- Growth since 2011 has largely been in these sectors, while jobs in Information and Cultural firms has declined.
- 14% of all Toronto jobs in the Finance, Insurance & Real Estate industry that are located in areas of employment are found here.
- The employment density here is estimated at about 159 jobs per hectare over the 127 hectares of employment land.
- \$86 million was invested in construction and alterations of projects over the past five years, and there is just 86,000 square metres of new non-residential development in the pipeline.
- Of the 65% of workers in this office-focused area who live within the City of Toronto, 33% chose a low-carbon mode of travel to work: 30% use transit, while 3% walk or bicycle.
- 15% of these workers reside in Neighbourhood Improvement Areas.

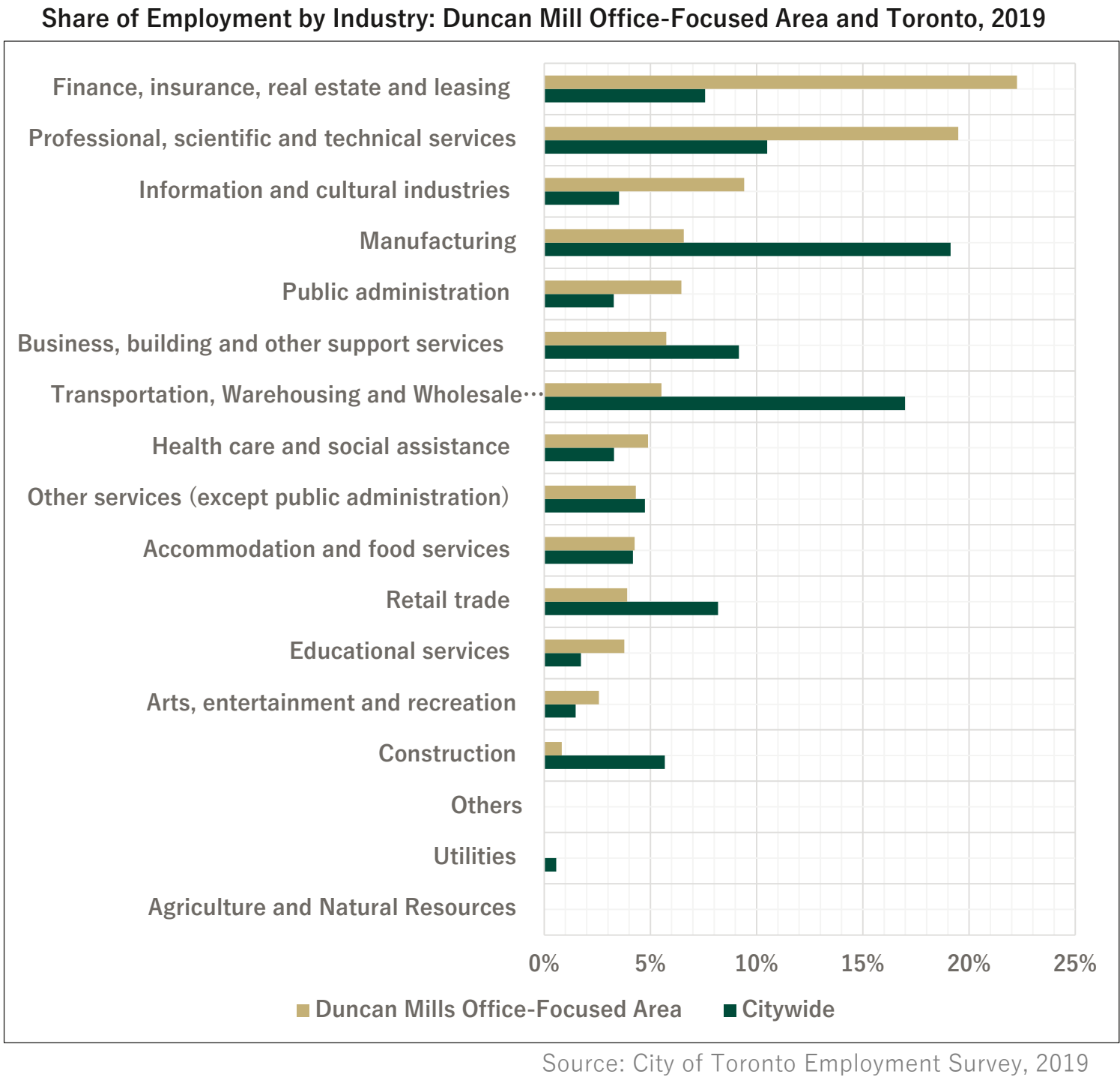
Outlook

- Small and mid-sized tenants seeking lower office occupancy costs will continue to be attracted to all the DVP/Hwy 404 office parks, rather than higher cost nodes Downtown or on Yonge Street.
- A higher propensity for private businesses to operate out of this area means that a transition to a hybrid approach to office occupancy may have greater impacts in this submarket compared with other office-focused areas.
- Conversion pressure is focused on lands that front onto York Mills Road. There is less pressure on the established office lands located in the interior areas, likely due to access and locational attributes.



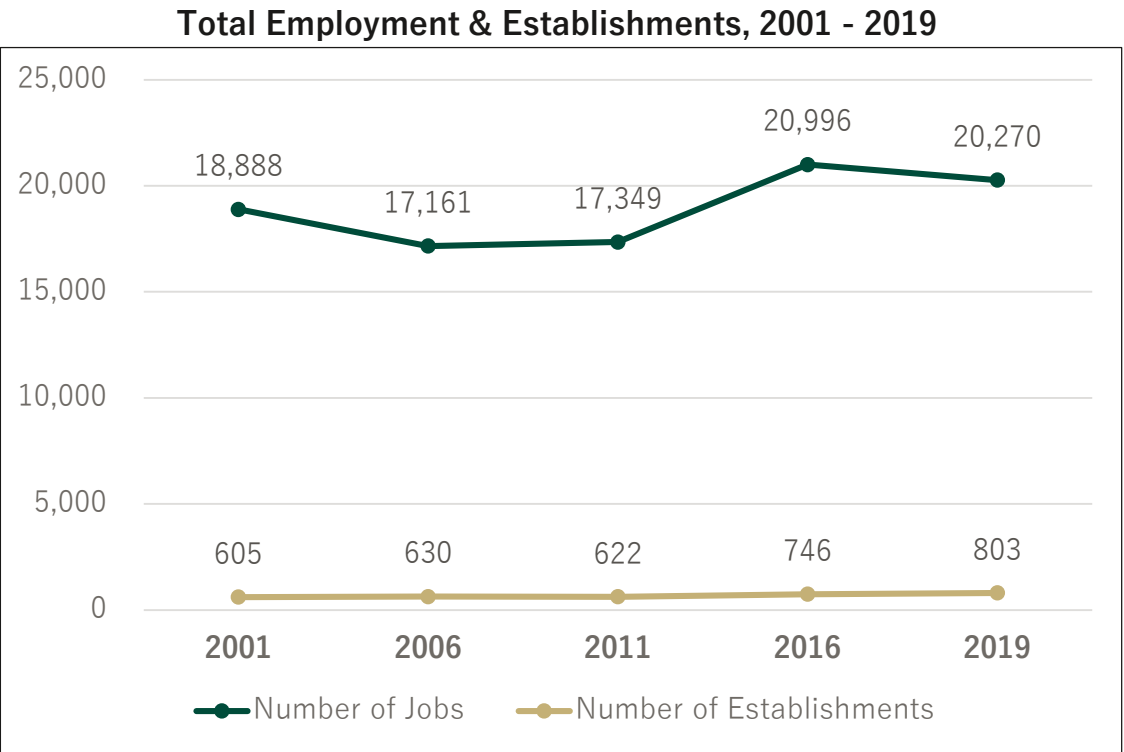
Source: City of Toronto 3D Massing

Share of Employment by Industry: Duncan Mill Office-Focused Area and Toronto, 2019



NAICS Categories	Number of Jobs
Finance, insurance, real estate and leasing	4,510
Professional, scientific and technical services	3,950
Information and cultural industries	1,910
Manufacturing	1,330
Public administration	1,310
Business, building and other support services	1,170
Transportation, Warehousing and Wholesale Trade	1,120
Health care and social assistance	990
Other services (except public administration)	870
Accommodation and food services	860
Retail trade	790
Educational services	760
Arts, entertainment and recreation	520
Construction	170
Others	0
Agriculture and Natural Resources	0
Utilities	0
Total	20,270

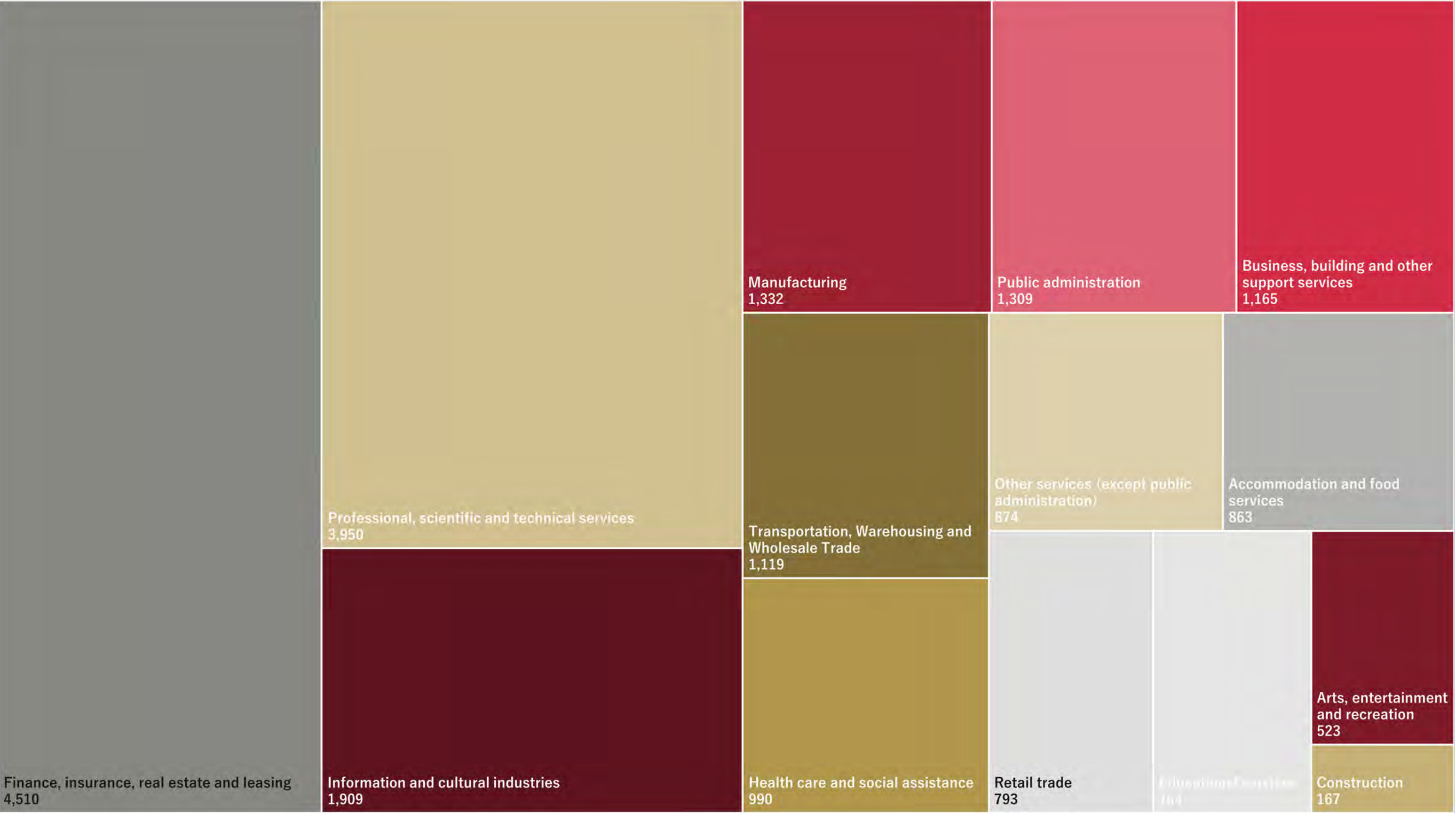
Source: City of Toronto Employment Survey, 2019



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Total Employment by Industry (NAICS), 2019:

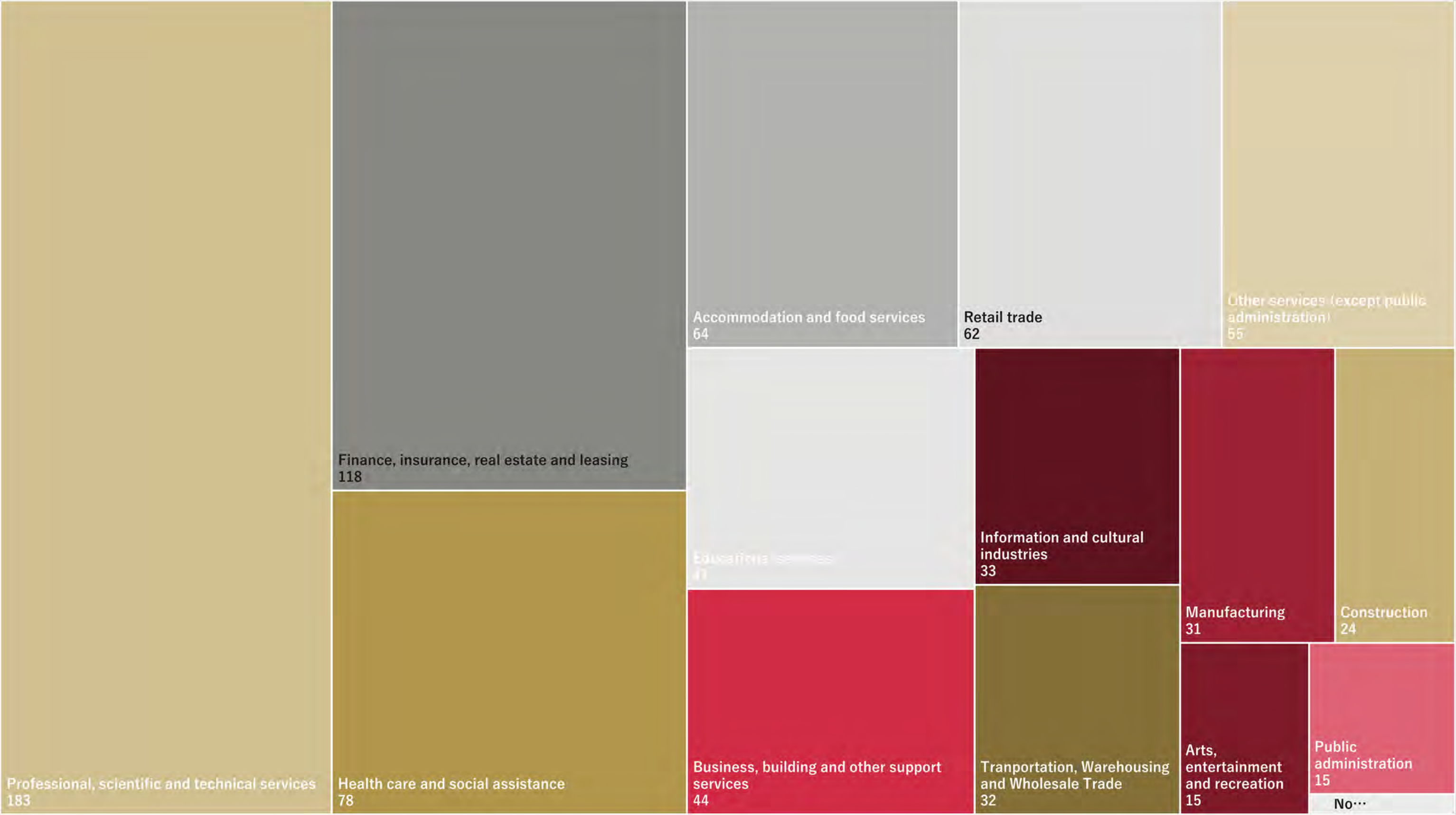


*NAICS: "North American Industry Classification System, v 3.0 2017

Source: Toronto Employment Survey, 2019



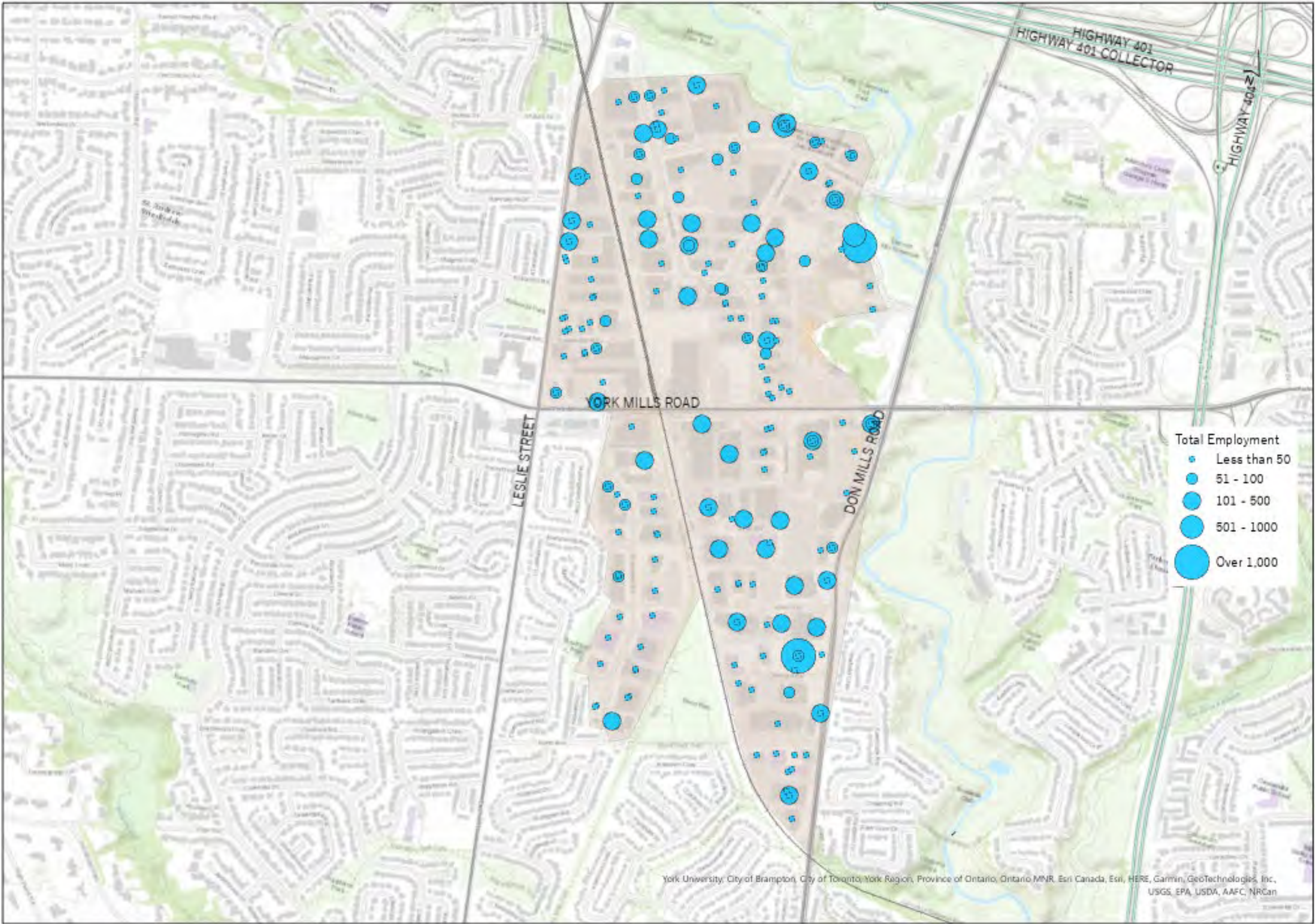
Total Establishments by Industry (NAICS), 2019



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

Source: Toronto Employment Survey, 2019

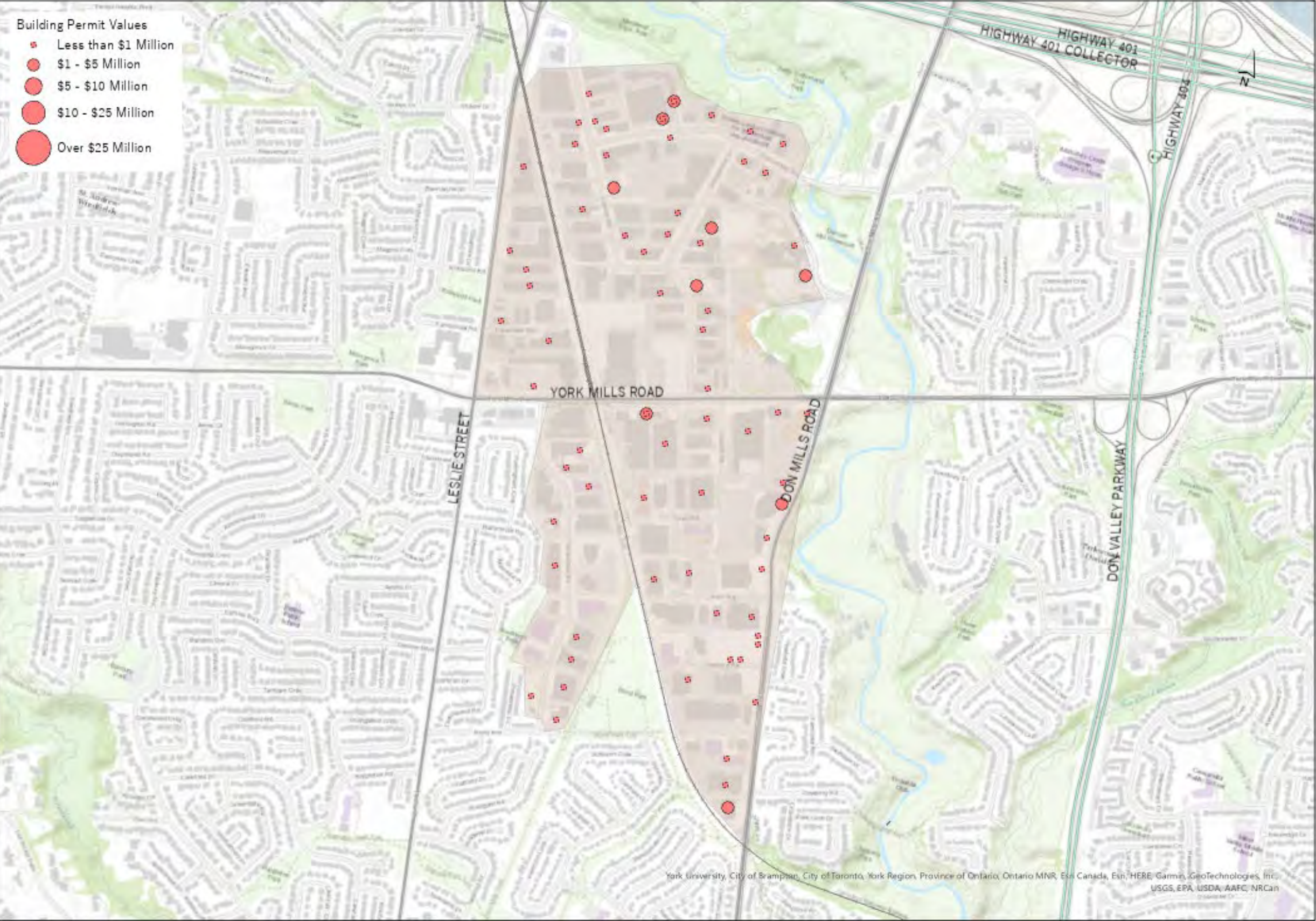
Employment and Establishments in Duncan Mill Office-Focused Area



Total Employment by Size of Establishment, 2019

Source: City of Toronto Employment Survey

Value of Non-Residential Building Permits, 2016-2019 in Duncan Mill Office-Focused Area



Total Non-Residential Investment

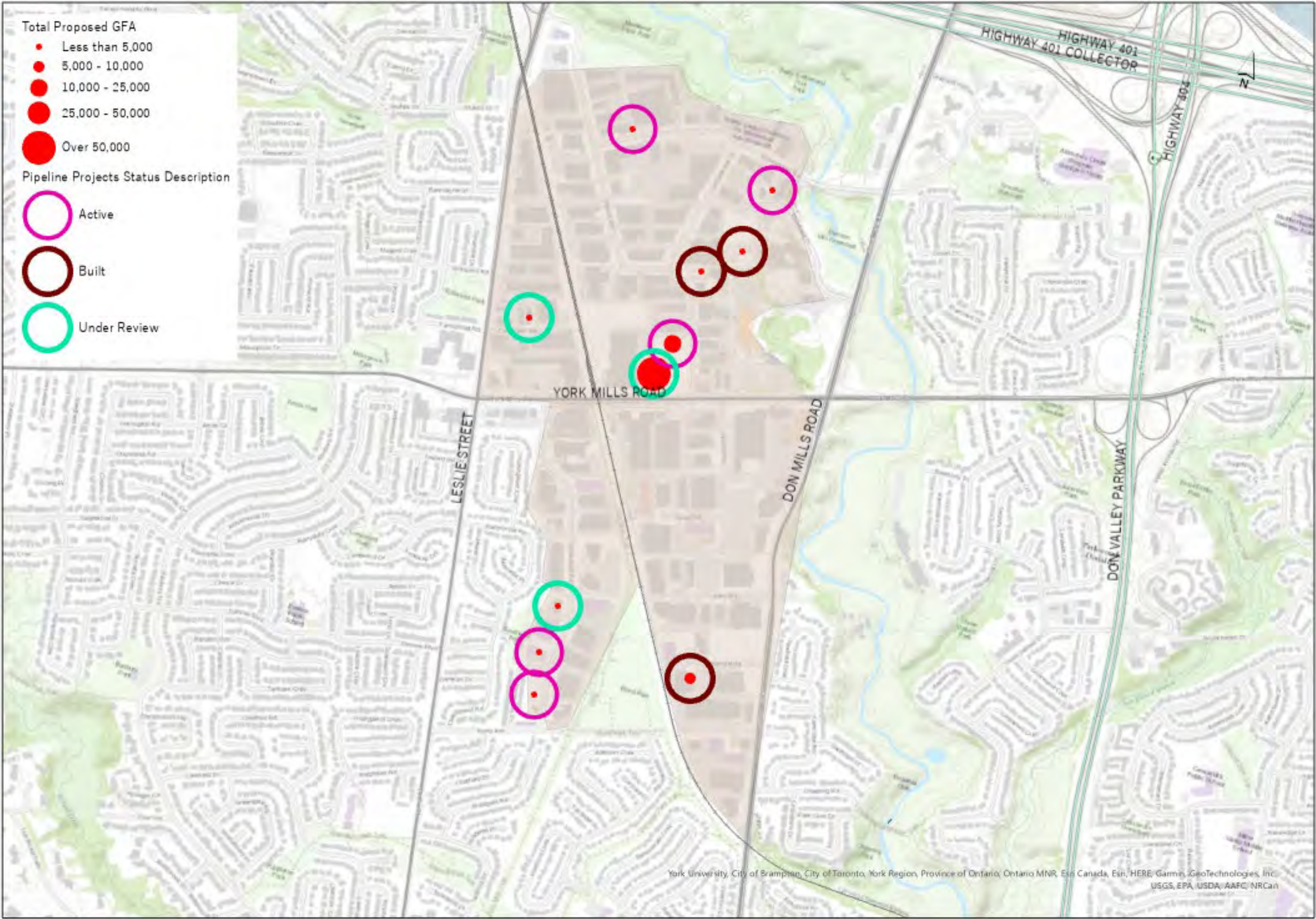
(\$000s):	\$86,364
New Building:	\$1,600
Interior Alterations:	\$53,939
Additions:	\$3,600
Multiple Projects:	\$27,225
Demolition:	\$0

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: 101,740 (sq. meters)

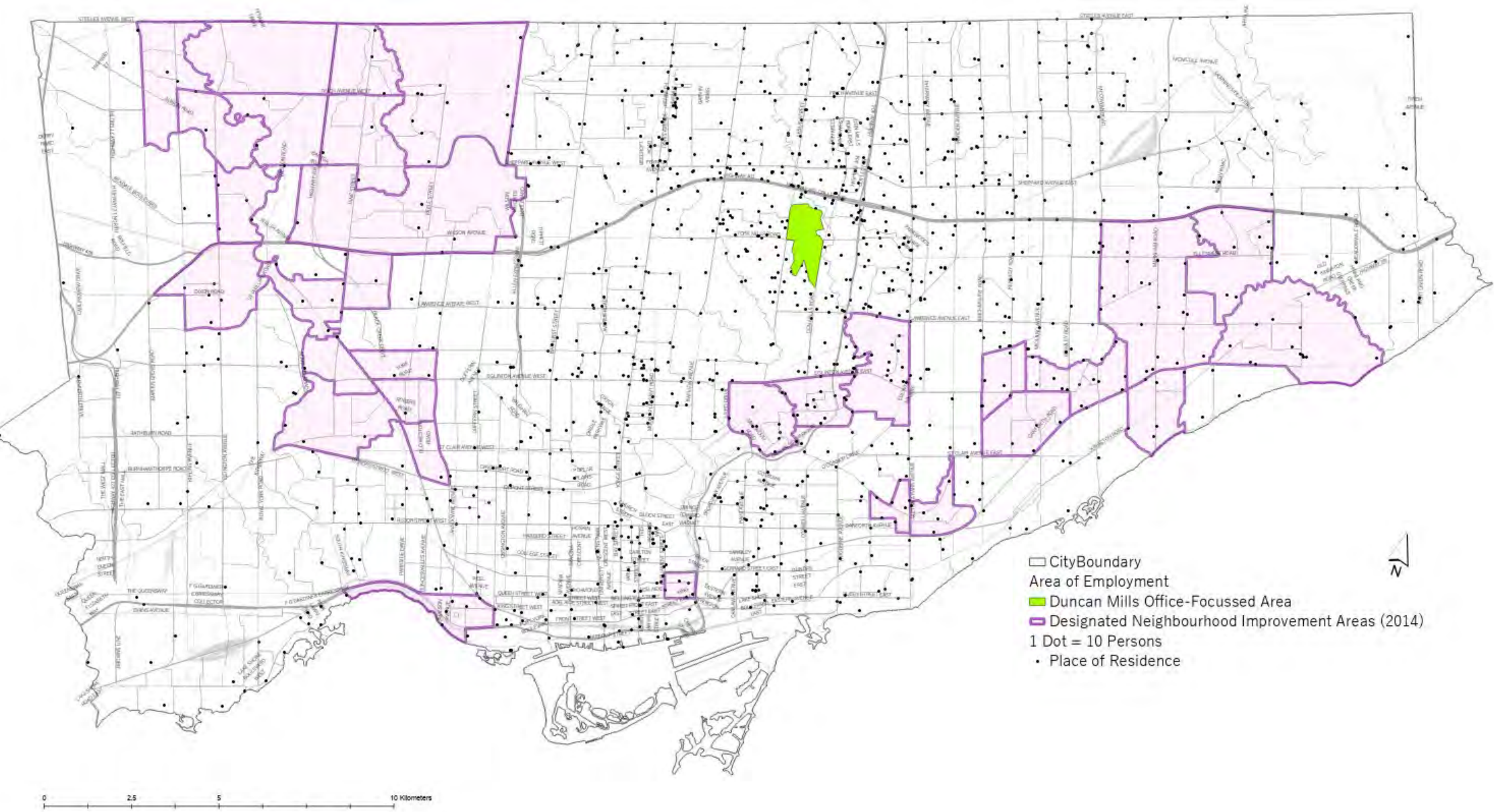
Active:	26,790
Built:	16,010
Under Review:	58,940

Non-Residential Development Proposals by Status

Source: City of Toronto Development Pipeline

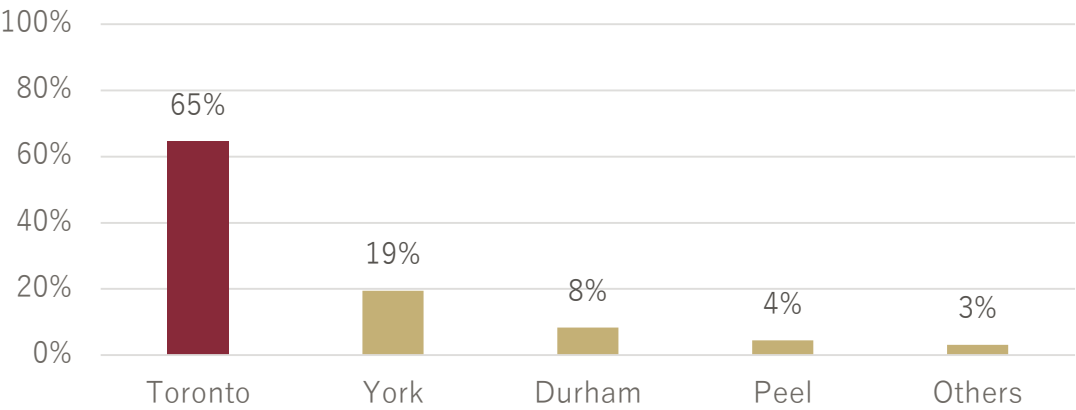


Place of Residence for Workers in Duncan Mill Office-Focused Area of Employment

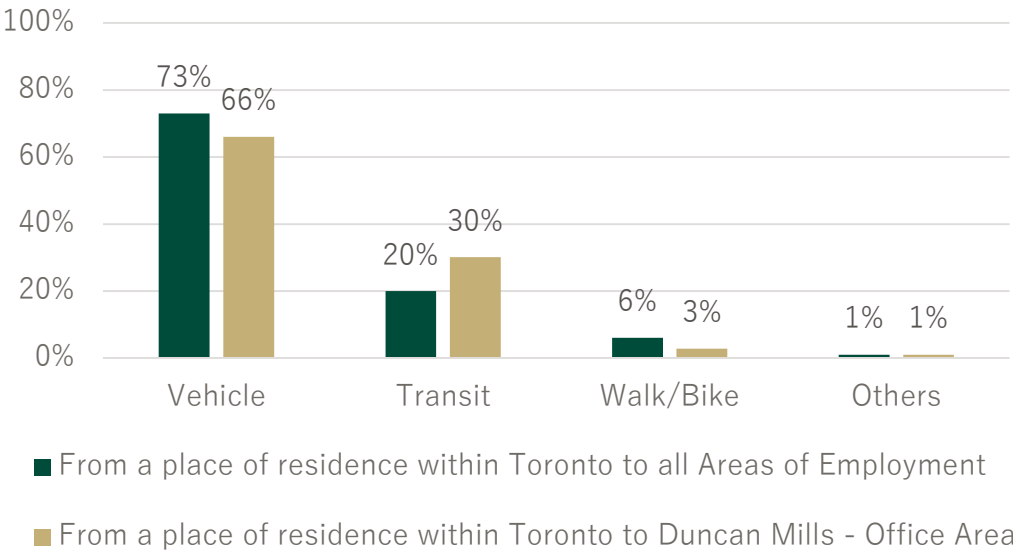


15% of the workforce share residing in Toronto live in Neighbourhood Improvement Areas.

Percent Distribution of Place of Residence



Mode of Transport of Commuters from Within Toronto to All Areas of Employment Compared to Duncan Mill Office



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

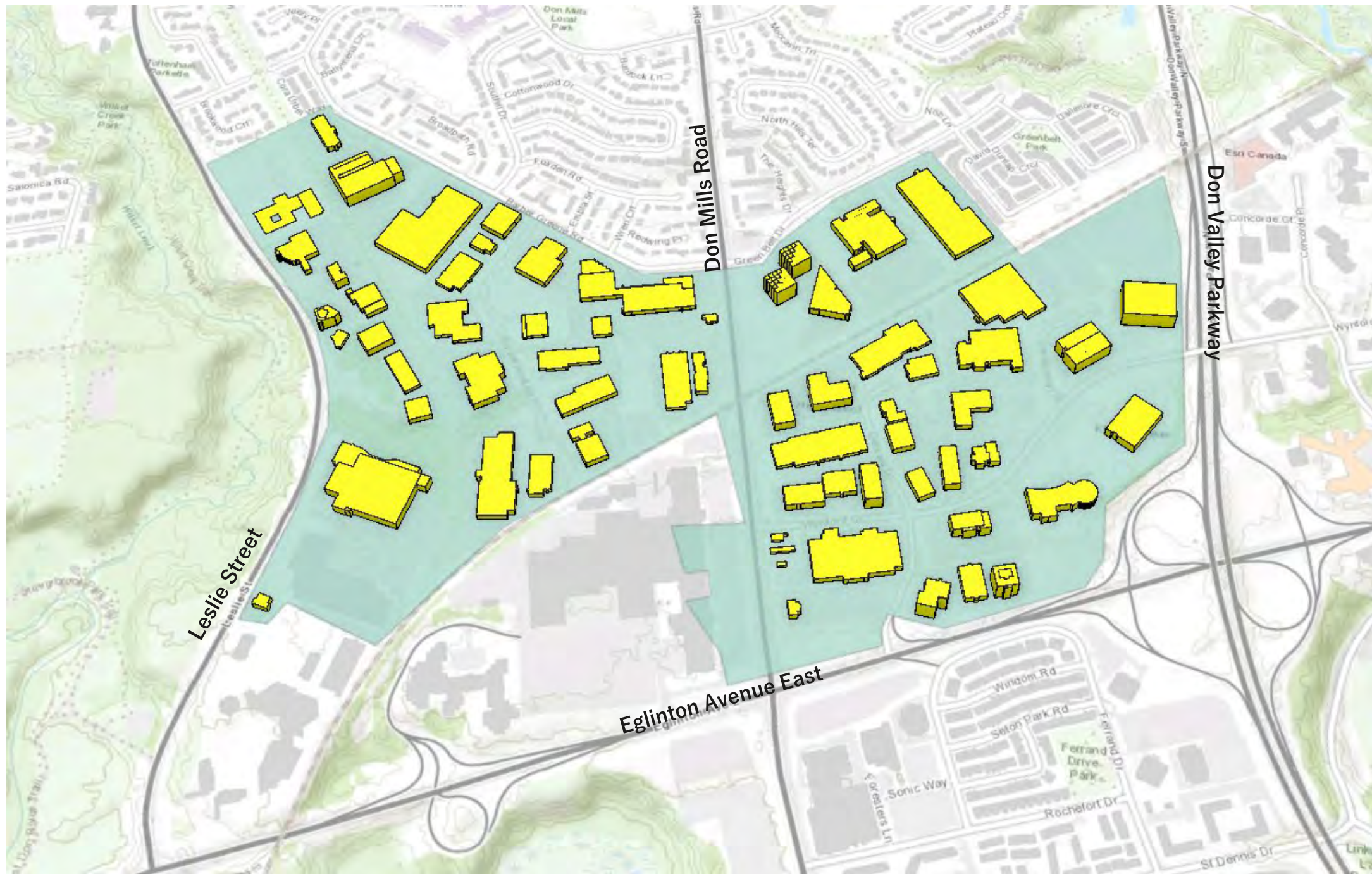


Profile 23

Don Mills Office-Focused Area of Employment

Don Mills Office-Focused Area of Employment

Area Context: Situated around Don Mills Road and Eglinton Ave. E., this was a prestige office park when first developed in the 1960s. It enjoys good access to the Don Valley Parkway and will soon be served by the Eglinton Crosstown transit line.



Source: City of Toronto 3D Massing



Key Map

Key Facts:

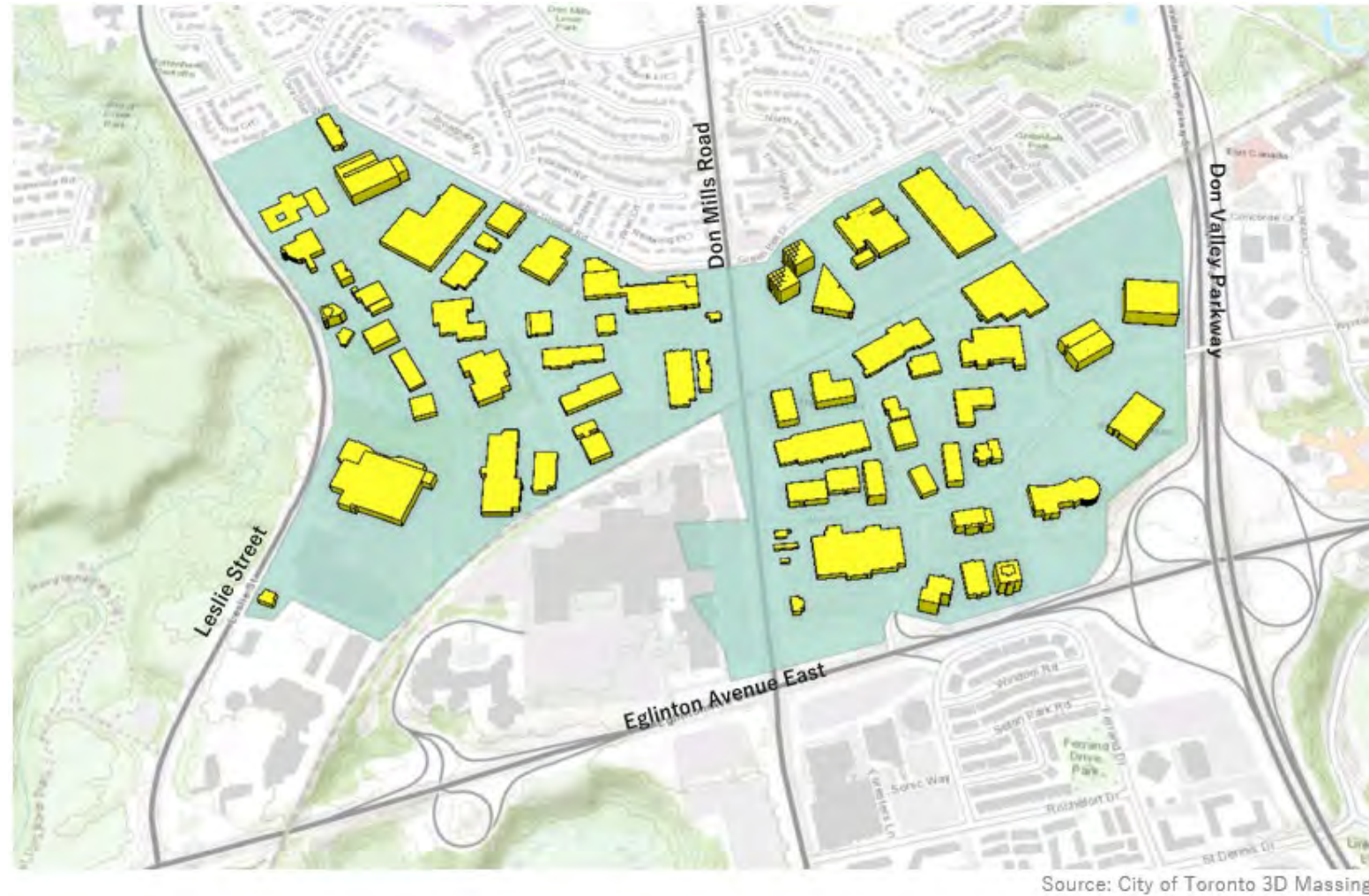
Total Land Area (Net Ha)	81.8 ha
Total Employment	10,628
Total Establishments	394
Rentable Building Area**(Industrial)	1.37 million sft.
Vacancy Rate(2021)	3.2 %
Employment Density (Net jobs/ha)	129.9

** Source: CoStar Group, www.costar.com

Top Employers:

- Morneau Shepell Ltd.
- Bell Canada
- Scotiabank
- Four Seasons Hotels Ltd.
- Symcor Inc

Don Mills Office-Focused Area North



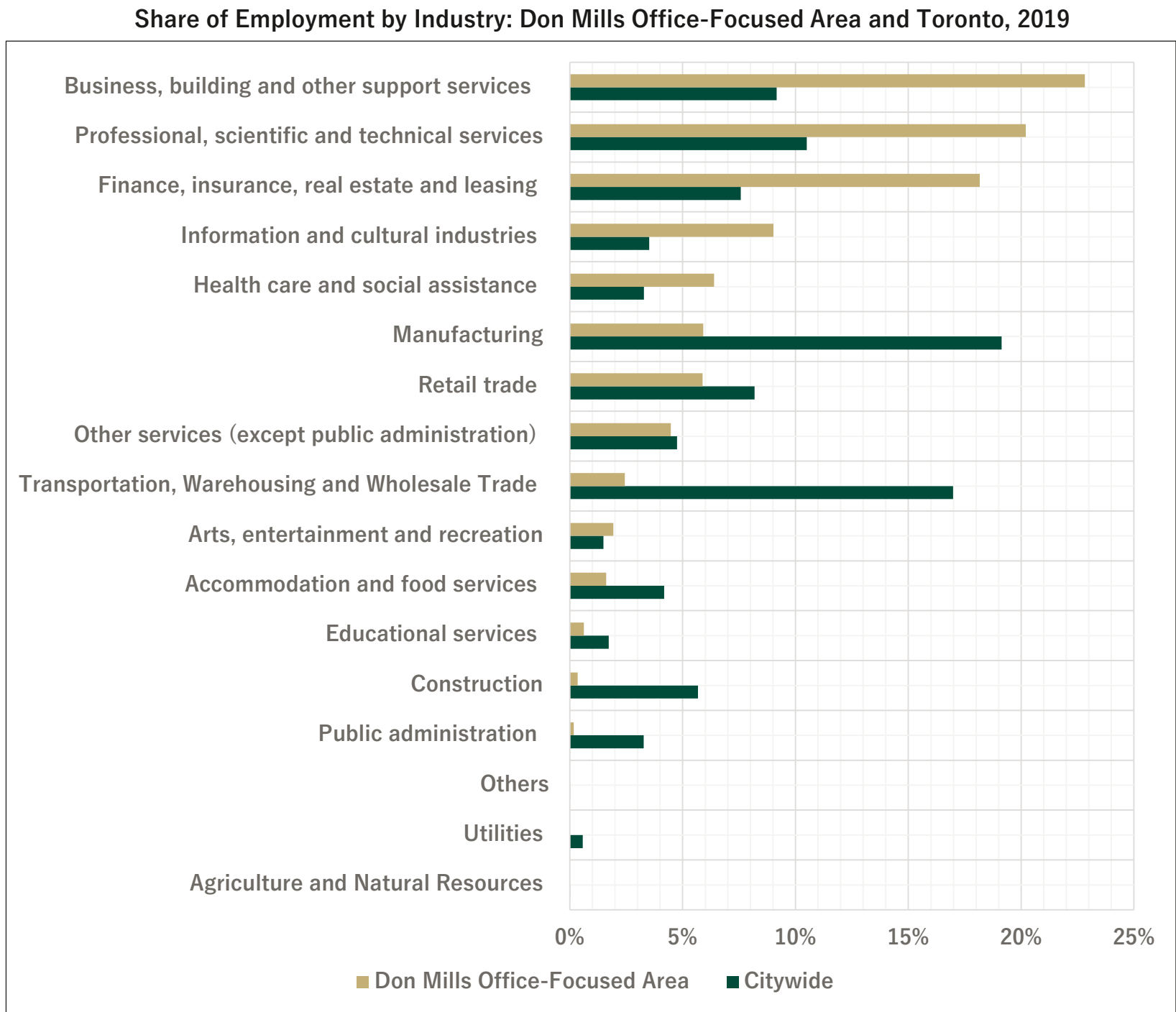
Function & Focus

- The 4.3 million square feet of office inventory was largely built between 1960 and 1980. It is largely Class B space (45%) while only 21% is Class A.
- This is a 'corporate' market with many larger tenants. However, Don Mills can equally accommodate small to medium sized occupancies as compared to some other suburban submarkets which traditionally cater to small occupancies.
- The 10,600 jobs (400 establishments) in 2019 represents a partial recovery from losses experienced from 2006 to 2011. Still, employment is 2,200 higher than it was in 2001.
- 23% of all jobs are in Business and Other Support Services, and 20% are in Professional, Scientific & Technical Services, while 18% are in Finance, Insurance & Real Estate.
- Growth since 2011 has largely been in these sectors, most notably in the broader Finance sector, which has added over 1,600 jobs since 2011.
- The employment density here is estimated at about 130 jobs per hectare over the 82 hectares of employment land.
- \$31 million was invested in construction and alterations of projects over the past five years.
- Of the 72% of workers in this office-focused area who live within the City of Toronto, 38% chose a low-carbon mode of travel to work: 32% use transit, while 6% walk or bicycle.
- 18% of these workers reside in Neighbourhood Improvement Areas.

Outlook

- The future Ontario Line subway will start at Don Mills and Eglinton and connect with the Eglinton Crosstown line.
- Larger tenants have migrated to Downtown in recent years. Some mid-sized tenants have migrated to the North Yonge Corridor. While rents are higher there, they are taking smaller premises to offset the pricing variance.
- A diversity of firms seeking lower office costs will continue to be attracted to all the DVP/Hwy 404 office parks.
- The proposed new head office building for Celestica will add about 250,000 square feet of new office space, while the redevelopment of the former Celestica lands will include 70,000 square metres of non-residential space.
- Land conversion pressure is identified as a significant concern between Don Mills Road and the Don Valley Parkway and on Leslie Street north of Eglinton Avenue East.

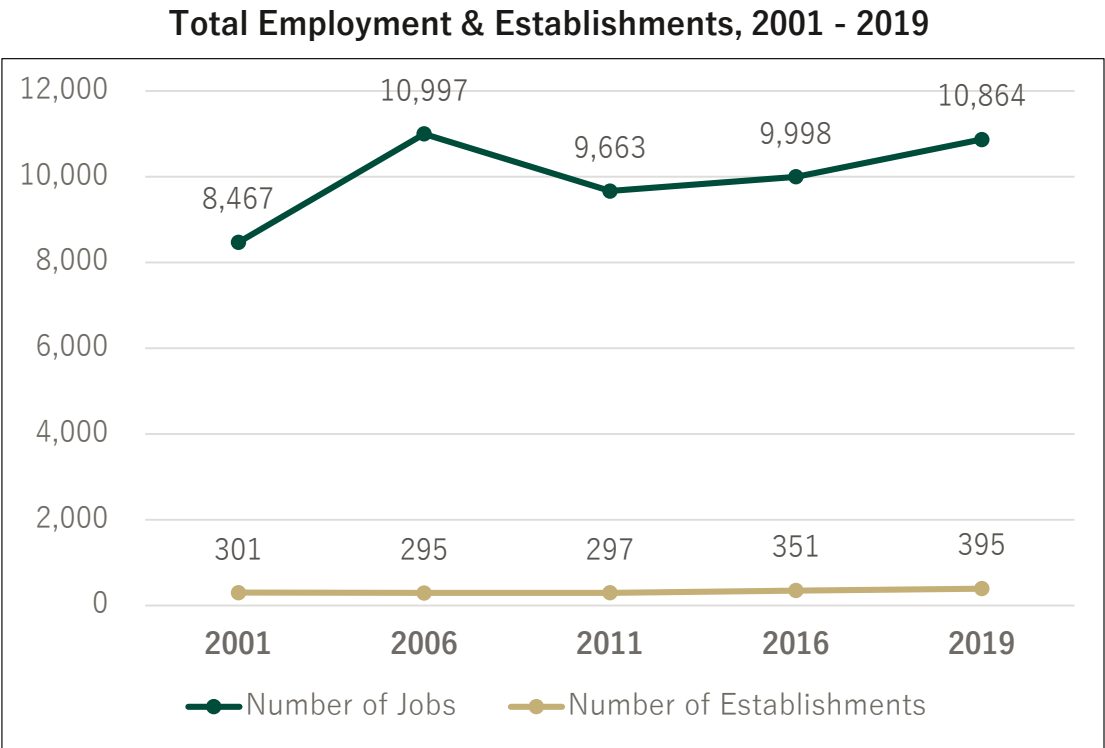
Share of Employment by Industry: Don Mills Office-Focused Area and Toronto, 2019



Source: City of Toronto Employment Survey, 2019

NAICS Categories	Number of Jobs
Business, building and other support services	2,430
Professional, scientific and technical services	2,150
Finance, insurance, real estate and leasing	1,930
Information and cultural industries	960
Health care and social assistance	680
Manufacturing	630
Retail trade	630
Other services (except public administration)	480
Transportation, Warehousing and Wholesale Trade	260
Arts, entertainment and recreation	210
Accommodation and food services	170
Educational services	70
Construction	40
Public administration	20
Agriculture and Natural Resources	0
Utilities	0
Others	0
Total	10,630

Source: City of Toronto Employment Survey, 2019

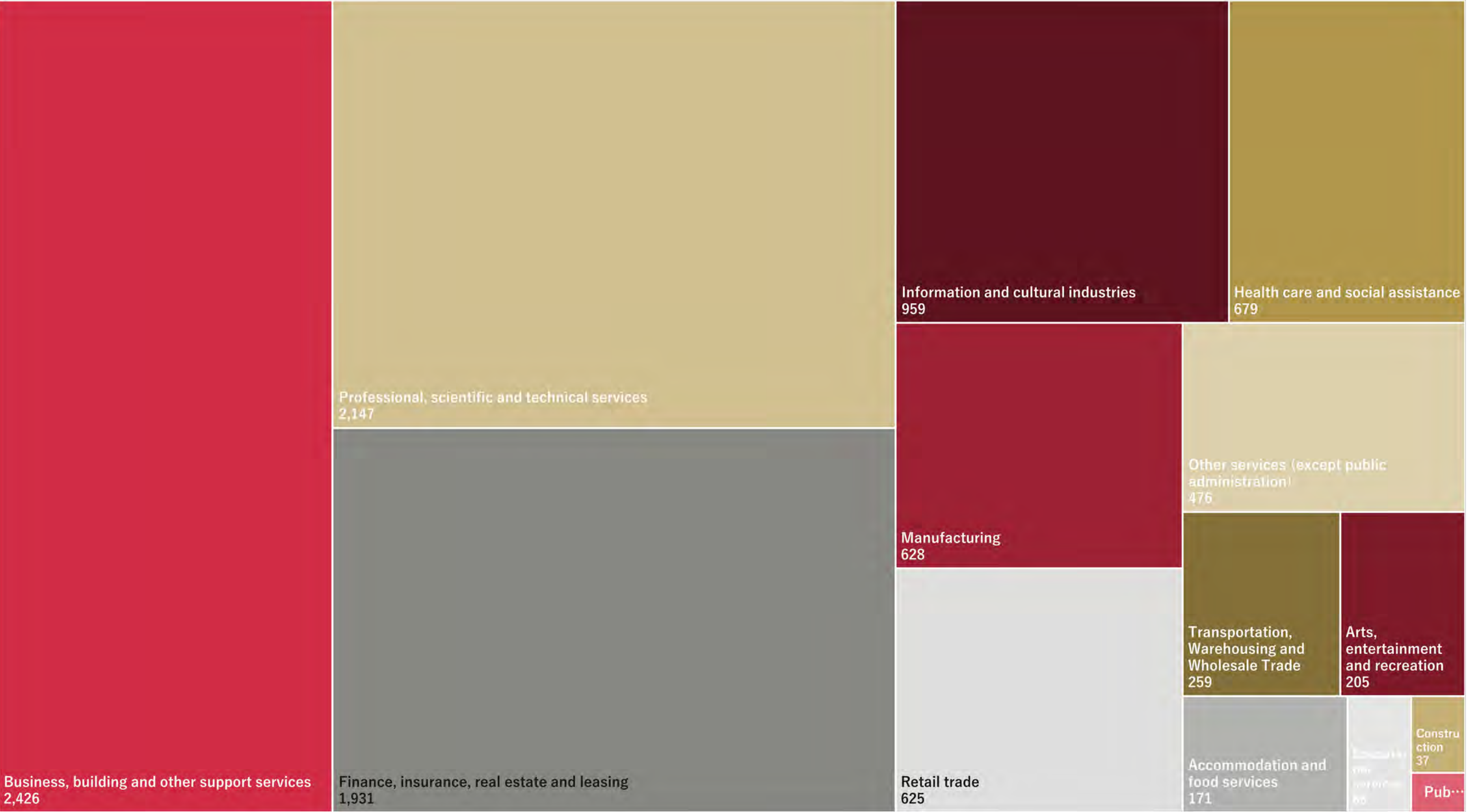


Source: City of Toronto Employment Survey, 2001-2019

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.



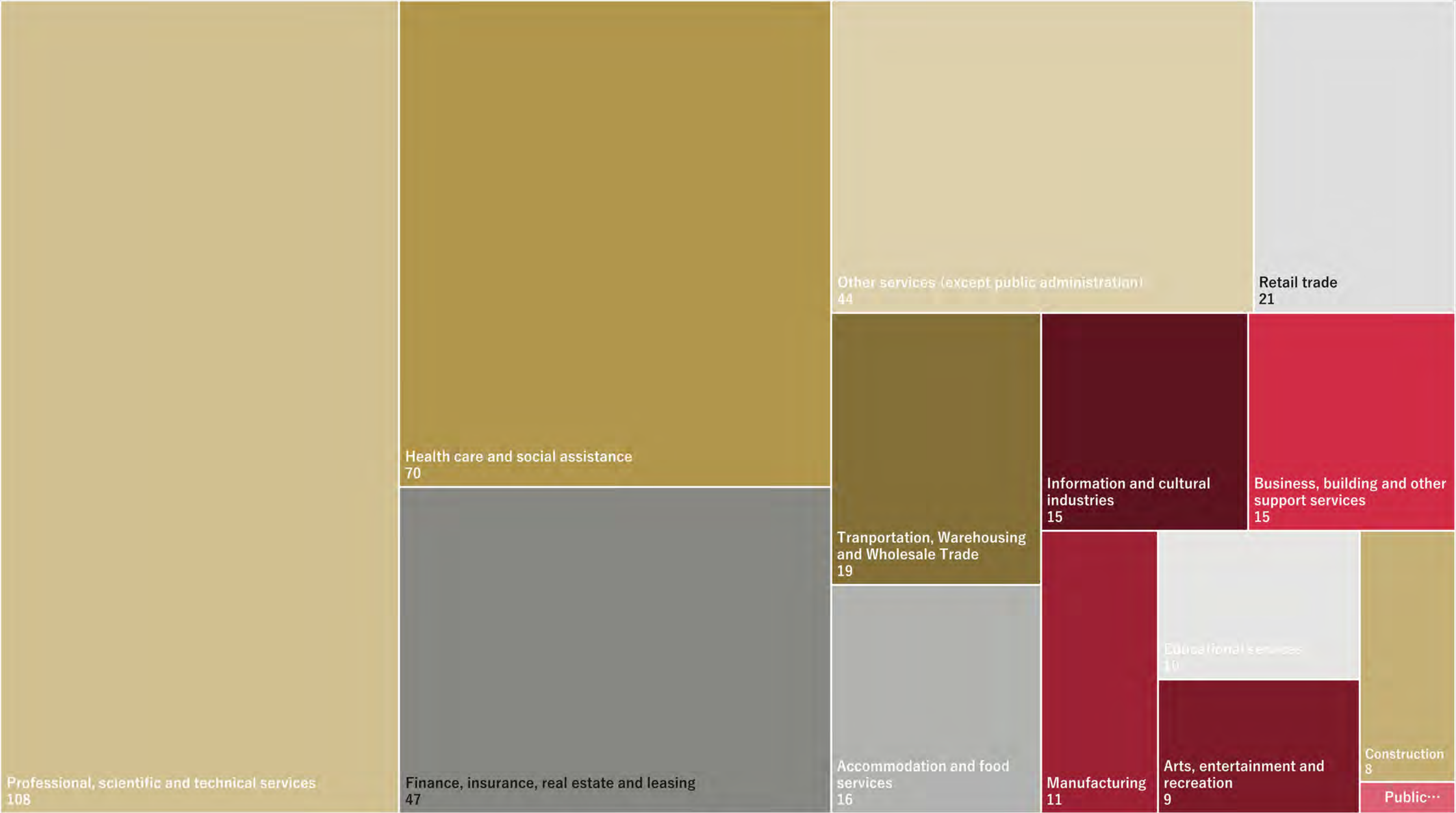
Total Employment by Industry (NAICS), 2019:



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

Source: Toronto Employment Survey, 2019

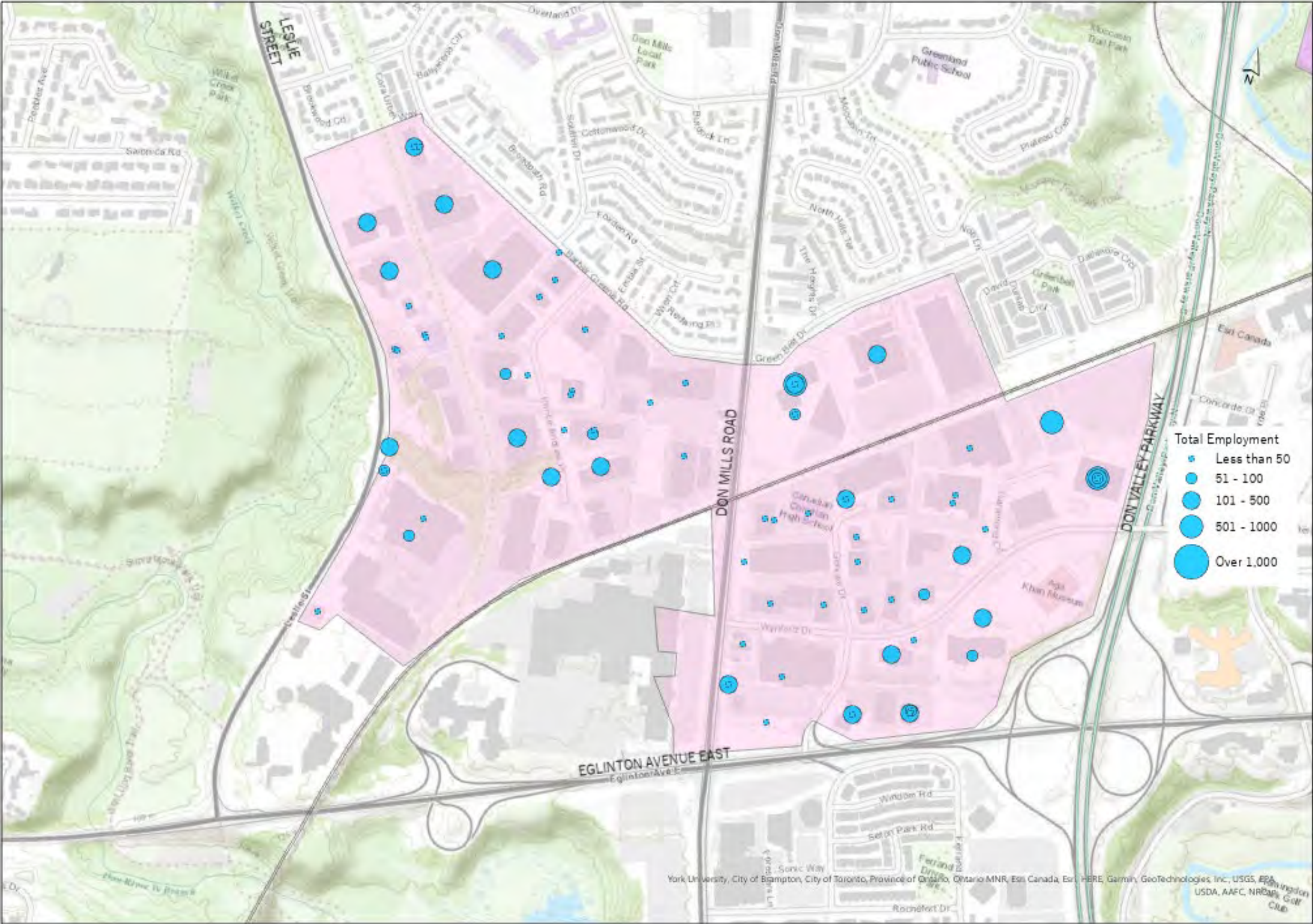
Total Establishments by Industry (NAICS), 2019



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

Source: Toronto Employment Survey, 2019

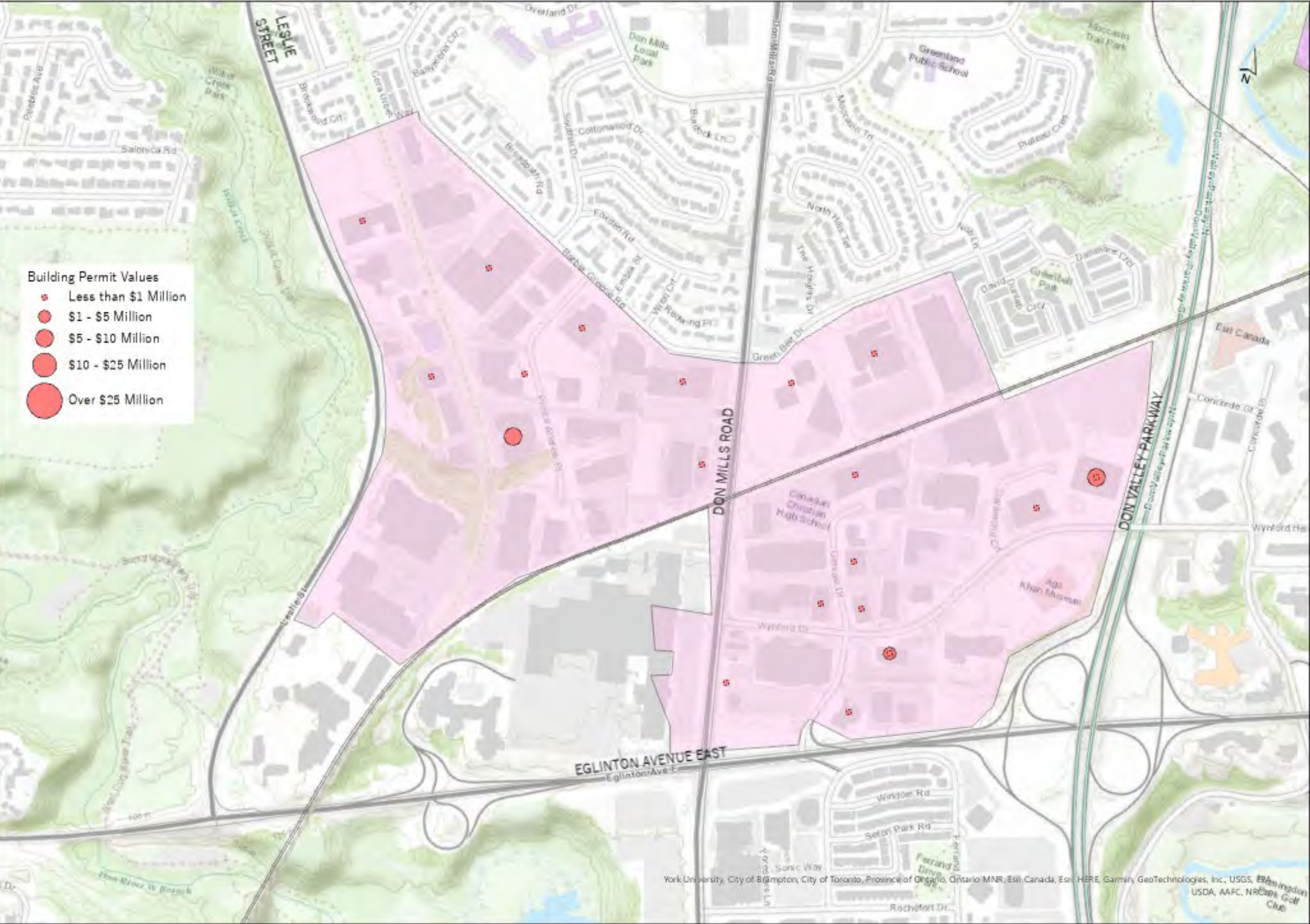
Employment and Establishments in Don Mills Office-Focused Area



Total Employment by Size of Establishment, 2019

Source: City of Toronto Employment Survey

Value of Non-Residential Building Permits, 2016-2019 in Don Mills Office-Focused Area



Total Non-Residential Investment

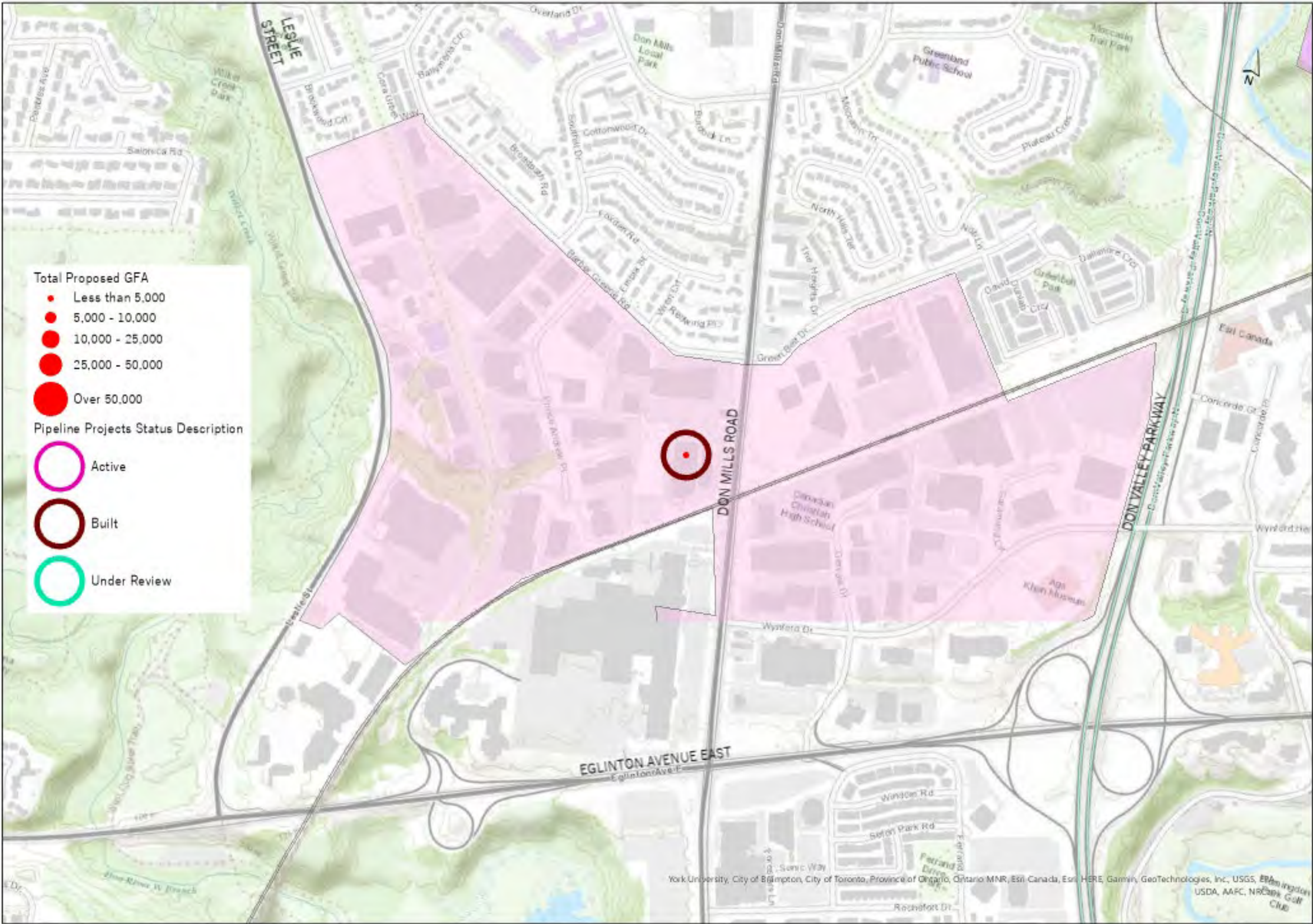
(\$000s):	\$31,411
New Building:	\$0
Interior Alterations:	\$31,211
Additions:	\$0
Multiple Projects:	\$200
Demolition:	\$0

Value of Non-Residential Building Permits, 2016 – 2021

Source: City of Toronto, Building Permits



Non-Residential Development Proposals by Status, Q2-2021



Total Proposed GFA

•

 Less than 5,000

•

 5,000 - 10,000

•

 10,000 - 25,000

•

 25,000 - 50,000

•

 Over 50,000

Pipeline Projects Status Description

○

 Active

○

 Built

○

 Under Review

Total Non-Res GFA in Proposed Developments:

1,930 (sq. meters)

Active: 0

Built: 1,930

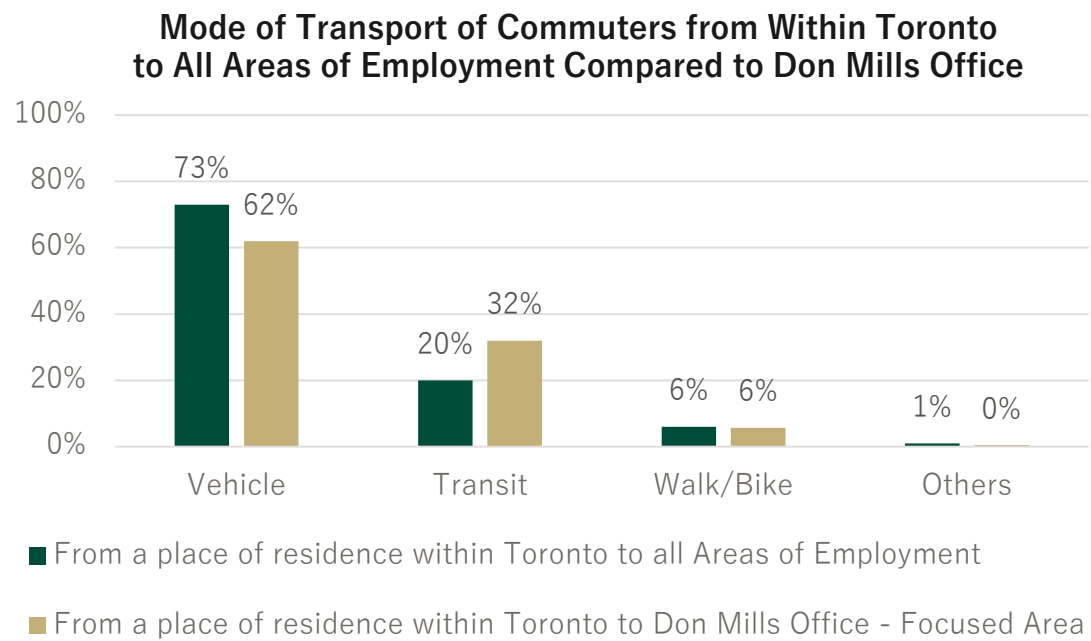
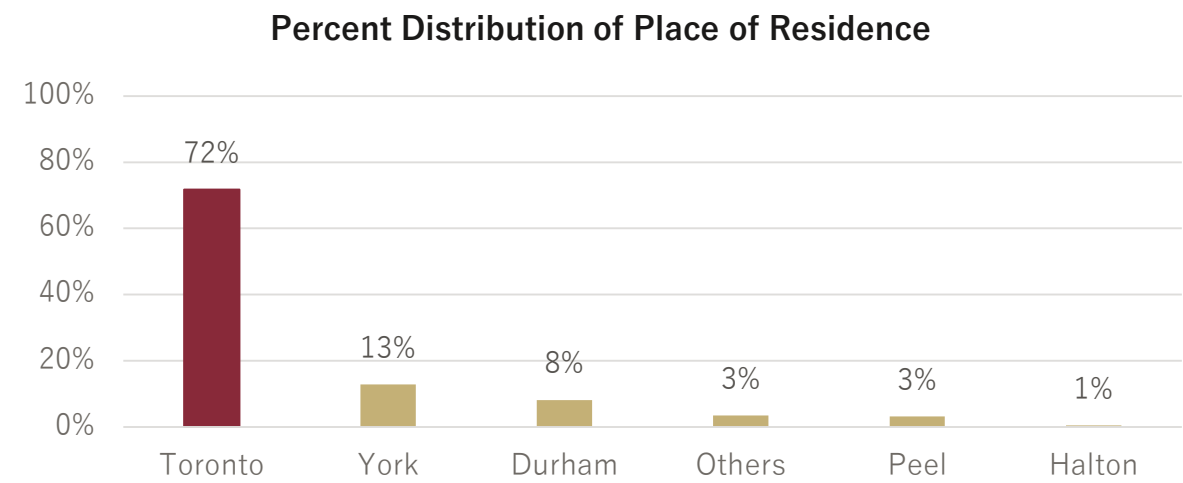
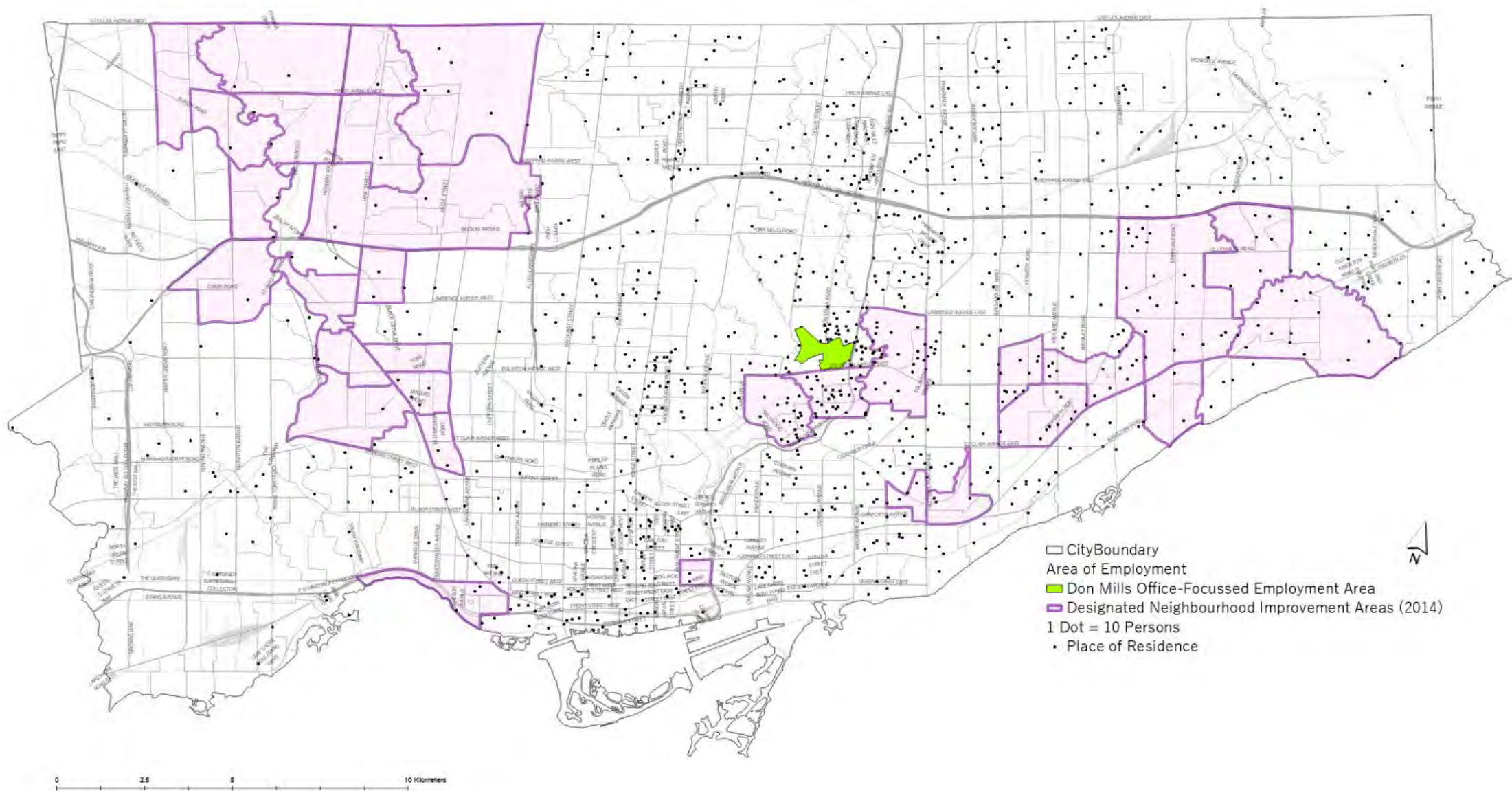
Under Review: 0

Non-Residential Development Proposals by Status

Source: City of Toronto Development Pipeline



Place of Residence for Workers in Don Mills Office-Focused Area of Employment



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

