Mississauga Development Profile 2004

Planning and Building Department, City of Mississauga *May 2004*

RETAIL COMMERCIAL CENTRES DEVELOPMENT

INTRODUCTION

This newsletter reports on existing and proposed retail commercial centre development in the City of Mississauga as of January 1, 2004. Data summaries are provided by retail centre type and Planning District and are divided into existing retail centres and the development of retail centres that is anticipated to occur on vacant lands. Retail commercial centre development on vacant lands is further divided into the following three categories: committed development; development subject to endorsed applications; and estimates of potential development on lands with a retail commercial centre designation. The data are based on building permit issuances, official plan designations, zoning, development applications, aerial photos and site checks.

Adjustments to the base data are made throughout the year as part of a continuous maintenance and verification process.

[1]Mississauga Plan was approved by the Region of Peel on May 5, 2003, however, the Retail Commercial policies were under appeal as of January 1, 2004. As such, City Plan designations were used to estimate the amount of development that could occur on retail commercial lands outside of City Centre. Mississauga Plan policies were in effect for City Centre.

While the focus of this newsletter is on Mississauga's retail commercial centres, information on the estimated amount of existing retail development outside of these centres is provided on page 3.

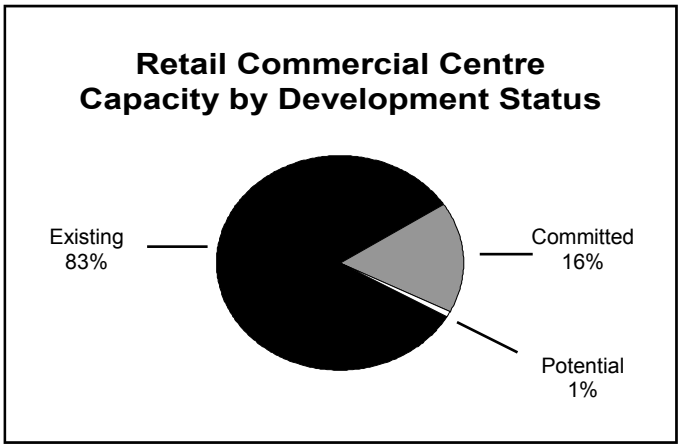
EXISTING DEVELOPMENT

Existing retail commercial centre development is defined as retail commercial centres which are built, under construction or for which building permits have been issued as of January 1, 2004. Information on retail space at Lester B. Pearson International Airport (LBPIA) has not been included.

Existing retail centre development totalled 1 342 600 m^2 (14,462,600 sq.ft.) or 83% of the City's retail centre commercial capacity. In 2003, only one new convenience centre was added to the City's inventory of existing centres. This centre was built in the East Credit Planning District.

The Heartland Town Centre continued to expand and the Erin Mills Town Centre site continued to add

Recently "De-malled" South Common Centre



City Centre

City Centre is a unique area from both a land use and a policy perspective. As such, special assumptions were made for this planning district.

The existing retail development data presented in this newsletter for retail centres includes the Square One Shopping Centre and the retail uses on the north side of Rathburn Road West, between Duke of York Boulevard and City Centre Drive. Data regarding existing accessory retail uses in office buildings throughout City Centre, are included on page 3 with the non-centre data.

Assumptions about future development have been made for all vacant lands in the Retail Core and for sites with existing development where intensification or redevelopment could occur in the Retail Core. Lands currently used for surface parking and the lands on the north side of Rathburn Road West, have been considered as having intensification or redevelopment potential.

Assumptions for vacant lands and lands with intensification and redevelopment potential within the retail core, are based on the a detailed analysis of existing site conditions. It was assumed that future retail development would have an F.S.I. (floor space index) of .8, similar to what exists on the site today. Although accessory retail uses are allowed on lands designated for mixed use development, no retail development potential has been calculated for these lands. Data regarding future retail development have been included in the committed development category as additional retail space could be developed based on the policies and regulations contained in the Official Plan and Zoning By-law.

additional free-standing retail uses. Both Meadowvale Town Centre and South Common Mall continued to "de-mall" and add retail pads along the perimeters of their sites. However, these additions only replaced demolished floorspace and did not result in additional floorspace. In the case of Meadowvale, a slight decrease in the total floorspace occurred.

Minor floorspace additions were also added to existing centres in Churchill Meadows, East Credit, Lisgar and Southdown.

The data for City Centre refers to lands designated Retail Core. This includes the Square One Shopping Centre and the commercial land uses on the north side of Rathburn Road West between Duke of York Boulevard and City Centre Drive.

With the construction of only one new commercial centre in 2003, the City's planned retail landscape is being realized with few remaining planned centres to be built. In future, pressure will mount to covert vacant industrial lands to commercial to allow for the development of additional retail centres/ concentrations.

COMMITTED DEVELOPMENT

Committed development refers to vacant lands that are designated and zoned for retail commercial centres and for which no building permit has been issued.

The total amount of committed retail commercial space is 258 600 m^2 (2,786,400 sq.ft.) which represents 16% of total retail commercial centre capacity in the City.

The committed space identified for City Centre (Retail Core area only) represents existing surface parking areas and additional space that could be developed north of Rathburn Road West. It is assumed that with the removal of these surface parking areas, new buildings would have to incorporate either underground or structured parking areas in order to provide sufficient parking.

Number of Existing Retail Centres by Centre Type and Floor Area

Centre Type	#	Floor Area
Convenience	74	84 200 m^2 (907,000 sq.ft.)
Neighbourhood	60	366 000 m^2 (3,940,800 sq.ft.)
District	12	282 000 m^2 (3,039,000 sq.ft.)
Regional	1	147 000 m^2 (1,581,000 sq.ft.)
City Centre (Retail Core area only)	1	164 000 m^2 (1,765,000 sq.ft.)
Special Purpose Commercial	5	288 000 m^2 (3,107,000 sq.ft.)
Employment Commercial	4	11 400 m^2 (122,800 sq.ft.)
TOTAL	**157**	**1 342 600 m^2 (14,462,600 sq.ft.)**

Number of Committed Retail Centres by Centre Type and Floor Area

Centre Type	#	Floor Area
Convenience[1]	6	9 400 m^2 (101,300 sq.ft.)
Neighbourhood[1]	2	16 700 m^2 (180,100 sq.ft.)
District[1]	1	23 000 m^2 (250,000 sq.ft.)
Regional[2]	1	37 000 m^2 (398,000 sq.ft.)
City Centre (Retail Core area only)[2]	1	115 000 m^2 (1,238,000 sq.ft.)
Special Purpose Commercial[2]	3	51 000 m^2 (549,000 sq.ft.)
Employment Commercial[1]	5	6 500 m^2 (70,000 sq.ft.)
TOTAL	**19**	**258 600 m^2 (2,786,400 sq.ft.)**

1 - refers to new centres
2 - refers to additional capacity at existing centres

ENDORSED APPLICATIONS

Endorsed applications refers to vacant land subject to a development application for which City Council has adopted a recommendation approving the application. While approved by City Council, these applications have not completed the development application process and are still subject to appeal to the Ontario Municipal Board.

As of January 1, 2004, there were no endorsed applications.

POTENTIAL DEVELOPMENT

Potential development refers to vacant lands where the zoning does not conform to the Official Plan and a development application, if submitted, has not been endorsed by City Council. The amount of development estimated to occur is based on what would be permitted by the Official Plan.

This category represents 1% of total retail commercial centre capacity. The total amount of commercial space in this category is 14 700 m^2 (158,300 sq.ft.).

Number of Potential Retail Centres by Centre Type and Floor Area

Centre Type	#	Floor Area
Convenience[1]	3	5 400 m^2 (58,200 sq.ft.)
Neighbourhood[1]	1	9 300 m^2 (100,100 sq.ft.)
TOTAL	**4**	**14 700 m^2 (158,300 sq.ft.)**

1 - refers to new centres
2 - refers to additional capacity

EXISTING RETAIL COMMERCIAL DEVELOPMENT OUTSIDE OF CENTRES

In addition to the 164 000 m^2 (1,765,000 sq.ft.) of retail space in the retail core area, City Centre, there is another 38 000 m^2 (409,000 sq.ft.) of retail space within the various office towers and other free-standing retail uses located throughout City Centre. In total, City Centre has approximately 202 000 m^2 (2.2 million sq.ft.) of retail space.

Outside of City Centre and designated retail commercial centres, retail commercial development also includes the traditional mainstreet areas, other concentrations of retail development and isolated retail sites throughout the residential and employment planning districts. Together these areas and sites add approximately 2.04 million m^2 (22 million sq.ft.) of retail commercial space to the City's inventory.

Adding the space in retail commercial centres (approximately 1.34 million m^2/ 14.5 million sq.ft.) to the retail commercial space in City Centre not in the retail core area (approximately 38 000m^2/409,000 sq.ft.) and the retail space outside of centres (approximately 2.04 million m^2/ 22 million sq.ft.), Mississauga has a total of approximately 3.42 million m^2 (37 million sq.ft.) of existing retail commercial space. These totals exclude retail space located at LBPIA.

Information from the Mississauga Employment Database and 2003 Existing Land Use coding indicates approximately 5,200 businesses in commercial centres (3,100 in designated centres and 2,100 in non-designated centres) with 38,900 employees (26,200 in designated centres and 12,700 in non-designated centres). There are also approximately 1,700 business and 20,300 employees located in other retail locations. Also, LBPIA has approximately 60 retail businesses with 1,200 employees.

* Source: 2003 Employment Survey, Planning and Building Department, City of Mississauga.

Retail Trends

2003 saw only minor changes to the retail landscape in Mississauga. The Heartland Town Centre continued to expand in 2003 with some additional capacity remaining. Both Meadowvale Town Centre and South Common Mall continued their "de-malling" schemes in response to the big box trend.

As major anchor tenants leave district and neighbourhood centres, it becomes increasingly difficult to find suitable and willing tenants to take over the vacant units.

Recently however, Loblaws has opened a "Real Canadian Wholesale Club" big box store at the Parkways West Shoppes centre (N28). Occupying approximately 3 700 m^2 (40,000 sq.ft.) which was previously a ValuMart grocery store, this format is not typical of similar membership type warehouse clubs. It is somewhat smaller, carries a limited range and selection of goods primarily geared to the small business owner, and unlike Costco and Sam's Club, requires no membership.

Perhaps this trend will continue at other district and neighbourhood centres looking to re-define their roles in the retail landscape.

In 2003, Walmart continued its expansion into the Canadian retail sector with the introduction of its Sam's Clubs wholesale membership club concept. Although currently there are no locations in Mississauga, this may change in the future if the other locations prove successful and are unable to adequately supply the marketplace. Given that no large concentrations of commercially designated land remain in the City, pressure may be put on the City to designate additional commercial lands which are currently designated for other land uses such as industrial or office In order to accommodate these types of retail uses.

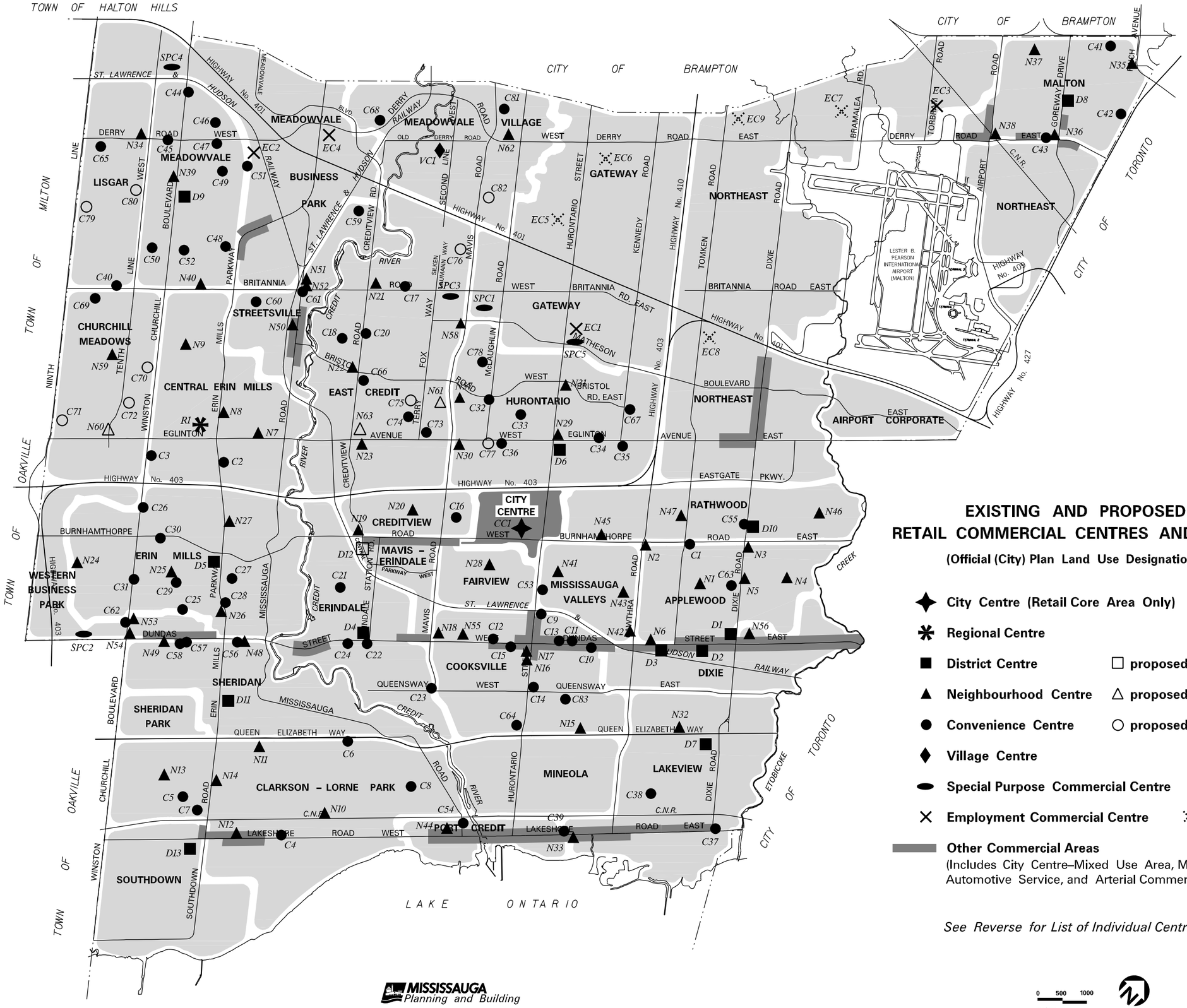
Retail Commercial Centres Development

Planning District	Existing m^2 (sq.ft.)	Committed m^2 (sq.ft.)	Endorsed Applications m^2 (sq.ft.)	Potential m^2 (sq.ft.)	Total m^2 (sq.ft.)
Applewood	42 200 (454,400)	0	0	0	42 200 (454,400)
Central Erin Mills	162 100 (1,743,600)	37 000 (398,000)	0	0	199 100 (2,141,600)
Churchill Meadows	11 400 (122,200)	9 300 (100,100)	0	5 400 (58,200)	26 100 (280,500)
City Centre	164 000 (1,765,000)	115 000 (1,238,000)	0	0	279 000 (3,003,000)
Clarkson-Lorne Park	32 500 (350,100)	0	0	0	32 500 (350,100)
Cooksville	49 300 (530,600)	0	0	0	49 300 (530,600)
Creditview	12 600 (135,600)	0	0	0	12 600 (135,600)
Dixie	17 500 (188,400)	0	0	0	17 500 (188,400)
East Credit	93 700 (1,011,200)	39 300 (423,000)	0	9 300 (100,100)	142 300 (1,534,300)
Erin Mills	52 500 (569,400)	0	0	0	52 500 (569,400)
Erindale	25 000 (268,900)	0	0	0	25 000 (268,900)
Fairview	8 700 (93,600)	0	0	0	8 700 (93,600)
Gateway	123 300 (1,330,000)	11 600 (125,000)	0	0	134 900 (1,455,000)
Hurontario	65 300 (703,100)	1 800 (19,400)	0	0	67 100 (722,500)
Lakeview	69 800 (751,700)	0	0	0	69 800 (751,700)
Lisgar	14 400 (155,500)	3 500 (37,700)	0	0	17 900 (193,200)
Malton	40 000 (431,000)	0	0	0	40 000 (431,000)
Mavis - Erindale	0	23 000 (250,000)	0	0	23 000 (250,000)
Meadowvale	51 100 (547,100)	0	0	0	51 100 (547,100)
Meadowvale Business Park	47 900 (517,600)	14 000 (151,000)	0	0	61 900 (668,600)
Meadowvale Village	9 300 (100,100)	200 (2,200)	0	0	9 500 (102,300)
Mississauga Valleys	13 200 (142,100)	0	0	0	13 200 (142,100)
Northeast	200 (2,200)	3 900 (42,000)	0	0	4 100 (44,200)
Port Credit	8 500 (91,500)	0	0	0	8 500 (91,500)
Rathwood	56 100 (604,300)	0	0	0	56 100 (604,300)
Sheridan	50 900 (552,500)	0	0	0	50 900 (552,500)
Southdown	15 000 (159,000)	0	0	0	15 000 (159,000)
Streetsville	14 300 (154,000)	0	0	0	14 300 (154,000)
Western Business Park	91 800 (987,900)	0	0	0	91 800 (987,900)
City Total	**1 342 600 (14,462,600)**	**258 600 (2,786,400)**	**0**	**14 700 (158,300)**	**1 615 900 (17,407,300)**

Numbers have been rounded to the nearest hundred for Neighourhood, Convenience and Employment Commercial centres, and to the nearest thousand for Regional, District and Special Purpose Commercial centres. Numbers may not add due to rounding.

MISSISSAUGA Planning and Building

May 2004



EXISTING AND PROPOSED RETAIL COMMERCIAL CENTRES AND AREAS

(Official (City) Plan Land Use Designations)

- **City Centre (Retail Core Area Only)**
- **Regional Centre**
- **District Centre** — **proposed**
- **Neighbourhood Centre** — **proposed**
- **Convenience Centre** — **proposed**
- **Village Centre**
- **Special Purpose Commercial Centre**
- **Employment Commercial Centre** — **proposed**
- **Other Commercial Areas**
  (Includes City Centre–Mixed Use Area, Mixed, Historic, Automotive Service, and Arterial Commercial Areas)

See Reverse for List of Individual Centres

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meters

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