

Clause No. 16 in Report No. 11 of Committee of the Whole was adopted, without amendment, by the Council of The Regional Municipality of York at its meeting held on June 26, 2014.

16

YORK REGION VACANT EMPLOYMENT LAND INVENTORY

Committee of the Whole recommends adoption of the following recommendations contained in the report dated May 28, 2014 from the Executive Director, Corporate and Strategic Planning:

1. RECOMMENDATIONS

It is recommended that:

1. Council endorse the vacant employment land supply information within this report.
2. The Regional Clerk circulate this report to the Ministry of Municipal Affairs and Housing, the Building Industry and Land Development Association (York Chapter) and local municipalities for information purposes.

2. PURPOSE

This report provides an overview of vacant employment land in York Region to mid-year 2013. Information on the current supply and characteristics, historic absorption and intensification opportunities of vacant employment lands in the Region is included. Data contained in this report will serve as the basis for the employment forecasts and land budgeting in the Region's upcoming Municipal Comprehensive Review (MCR) of the *York Region Official Plan, 2010 (YROP-2010)*.

3. BACKGROUND

Planning for employment lands is key to economic vitality in York Region

Employment lands are major drivers of economic activity. The 2014 *Provincial Policy Statement (PPS)* and the *Provincial Growth Plan* recognize the need to protect and preserve employment lands within employment areas, especially in freight-supportive locations along 400-series highways and other major goods movement corridors.

Employment land conversions may be considered only at the time of an MCR. An MCR is an official plan review or amendment which is initiated by a planning authority and can update forecasts and land needs.

Provincial and Regional planning policies strive to protect employment lands

The Provincial *Planning Act* identifies the provision of employment lands as a Provincial interest, and as such, allows for “no appeal” of conversion policies in local official plans. This means that local official plans can include policies that prohibit the conversion of employment lands to non-employment uses.

The *YROP-2010* aims to maintain and enhance the long-term viability of employment lands. Ensuring that there is an adequate and diverse supply of vacant employment lands assists the Region in achieving its goal of economic vitality by creating a competitive and flexible economic environment that encourages investment and a diversity of employment opportunities. Policies in the *YROP-2010* strive to protect employment lands from conversions to non-employment uses, limit ancillary uses on employment lands to uses that primarily service businesses within employment lands, and encourage redevelopment and intensification on employment lands.

Employment lands are designated in an official plan to accommodate clusters of business and economic activities

The Employment Land Inventory (the “inventory”) is a parcel based inventory of employment lands within employment areas throughout the Region, as reflected on the *Attachment 1* maps. The 2014 *PPS* defines employment areas as “those areas designated in an official plan for clusters of business and economic activities including, but not limited to, manufacturing, warehousing, offices and associated retail and ancillary facilities.”

For forecasting and monitoring purposes, the Region divides employment into three main employment categories:

- Employment
- Major office
- Population-related

Attachment 2 provides detail on each employment category. This report deals only with employment land employment. Traditionally, employment areas referred strictly to districts dedicated to industrial land uses. Changes in the economy have altered the function of employment areas to include a broader range of uses. In addition to traditional manufacturing and industrial activities, employment areas now include commercial, business, personal service, and other activities.

This inventory includes designated employment lands within approved local Official Plans, including rural areas that have received approval for Industry on Private Services (IPS). The inventory does not include employment uses within commercial or mixed-use areas, such as the Regional centres, or isolated employment land parcels outside of employment areas.

The York Region Employment Land Inventory provides updates to 2013

This report provides an update to the regional inventory of employment lands within employment areas to mid-year (July) 2013. Additional refinements to employment areas have occurred since mid-year 2013, and will be captured in the 2014 update. The last update to the inventory was completed for mid-year 2006. The data from that inventory was updated and incorporated into the March 2010 land budget that formed part of the Region's last MCR. This inventory provides an update to the information used in the last MCR and includes further refinements to the data structure that ensure a comprehensive and consistent approach to analyzing data. It is the Region's intention to continue to update the employment land inventory on a regular basis.

While the inventory includes all lands within employment areas, the analysis in this report focuses on the vacant land portion of the inventory. Future work and a staff report will provide detailed information on the current characteristics, uses and densities of built employment lands within employment areas.

Data contained within this report will inform the next five-year MCR and *YROP-2010* update, which will extend the current 2031 forecasts and land needs analysis to 2041. It is forecast that York Region will grow to 900,000 jobs by the year 2041, which represents growth of approximately 350,000 jobs between 2013 and 2041. Regional staff will assess the characteristics of employment land supply in the context of the short, medium, and long-term.

4. ANALYSIS AND OPTIONS

The supply of vacant employment lands remains healthy but strategically located sites need to be protected

The key findings of the mid-2013 vacant employment land inventory are:

1. There are 2,972 net hectares of vacant employment lands within designated employment areas, compared to approximately 3,140 net hectares in 2006. Forty-four percent of the vacant supply is located in the City of Vaughan.

2. Approximately 645 net hectares of vacant employment lands were absorbed in York Region between 2006 and 2013, representing an average annual absorption rate of 92 net hectares.
3. Seventy-three percent of the vacant employment land supply (2,168 net hectares) is currently supported by Regional infrastructure. Twenty-three percent of the vacant employment land (682 net hectares) requires extension of Regional water and wastewater systems to support the provision of municipal services, and the remaining 4% (121 net hectares) has IPS.
4. Of the 2,168 net hectares that are currently supported by Regional infrastructure, 1,336 net hectares have local municipal services in place as well, while 832 net hectares would require extensions to the local water and/or wastewater systems.
5. Approximately 20% of vacant employment parcels, amounting to 2,158 net hectares, are greater than 5 hectares.
6. Nearly 25% of vacant employment parcels, amounting to over 500 net hectares of land, are within 1 km of a 400-series highway.
7. Approximately 60% of vacant employment parcels, amounting to approximately 1,080 net hectares of vacant employment land, are within 500 metres of a transit stop.
8. There are approximately 225 net hectares of employment lands with intensification potential.

Unless otherwise stated, all area calculations are reported in net hectares. *Attachment 2* provides a more detailed description of area definitions.

There are 2,972 net hectares of vacant employment lands in York Region

As of 2013, there are 2,972 net hectares vacant employment lands in York Region, down slightly from 3,140 net hectares in 2006. The City of Vaughan has 1,296 net hectares of vacant employment land (or 44% of the total net inventory), and continues to dominate the supply of vacant employment lands in the Region.

The employment land inventory includes three main vacant/built status categories: vacant, built, and other. A description of each category is provided in *Attachment 2*. *Table 1* displays 2013 employment lands by vacant/built status and local municipality.

Table 1
Employment Land by Vacant/Built Status and Local Municipality, 2013

	Vacant	Built	Other	Total
Aurora	162	231	23	416
East Gwillimbury	418	116	28	563
Georgina	308	23	7	338
King	75	53	4	132
Markham	363	1,130	85	1,578
Newmarket	34	228	13	275
Richmond Hill	160	377	18	555
Vaughan	1,296	2,257	186	3,740
Whitchurch-Stouffville	154	182	11	347
York Region	2,972	4,598	374	7,944

Source: York Region Office of the Chief Administrative Officer

Note: All area data in net hectares. Numbers may not add up due to rounding. "Other" includes parcels with uses such as stormwater management, environmental uses, legal non-conforming residential uses, rail and road right-of-ways, and other infrastructure uses.

New employment lands have been added since the previous inventory

Through the 2010 land budget work and Regional Official Plan update, new employment lands have been added to the inventory to accommodate the 2031 employment forecasts, as follows:

- ROPA 52 in Vaughan (which includes Highway 400 Northwest, Highway 400 Northeast, Teston East and Teston West Employment Areas that were added to the 2011 inventory)
- ROPA 1 in East Gwillimbury

Together, ROPA 52 and ROPA 1 account for a total of approximately 590 net hectares of employment land (including built, vacant, and other parcels).

The recent ROPA 3, Phase 1 OMB decision approved the Region's land budget methodology and the quantum of land required for urban expansion in the City of Markham to accommodate both population and employment growth to 2031. A future phase of the hearing will determine the location of the employment land required. When the location is determined, the lands will be added to the inventory.

Refinements resulting in minor additions to and removals from the inventory were made to existing employment areas since the March 2010 land budget. *Attachment 3* provides more detailed information on the refinements.

It is anticipated that additional employment lands will be converted to other uses

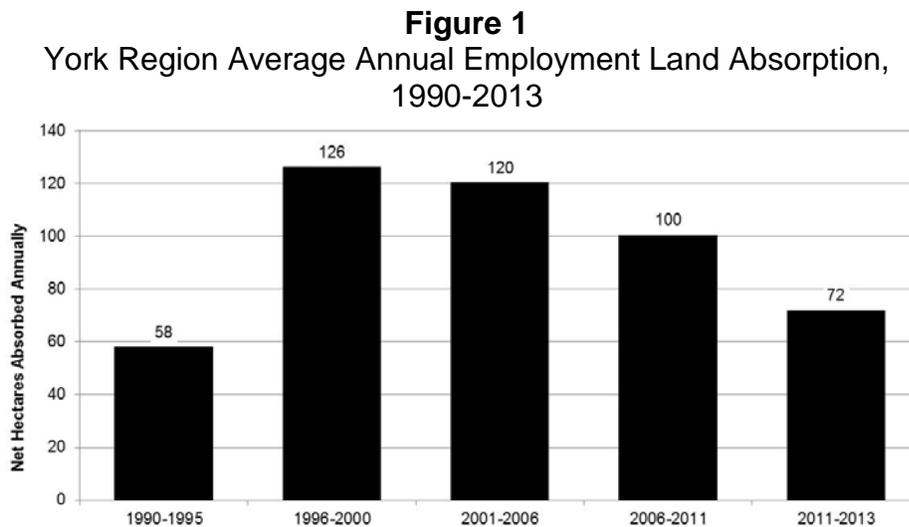
There are a number of local municipal MCRs and legacy conversion requests underway that may result in the removal of up to 260 net hectares of employment lands in the municipalities of Aurora, Georgina, King, Markham, Richmond Hill, and Vaughan.

Legacy conversion requests are privately initiated conversion applications that were submitted prior to the 2005 *PPS* coming into effect on March 1, 2005. The prohibition of conversions outside of MCRs does not apply to legacy applications.

Approximately 645 net hectares of vacant employment lands were absorbed in York Region between 2006 and 2013

From 2006 to 2011, approximately 500 net hectares of vacant employment lands were absorbed in York Region. Between 2011 and 2013, approximately 145 net hectares of employment land were absorbed. This absorption includes all lands that were built for employment uses and discounts lands that were re-designated for non-employment uses.

As seen in *Figure 1* below, the average annual absorption from 2006 to 2011 was 100 net hectares and 72 net hectares between 2011 and 2013 (although it should be noted that the 2011-2013 period does not reflect a full five-year timeframe). This reflects a slower absorption dating back to the 1996 to 2000 time period.



Source: York Region Office of the Chief Administrative Officer, June 2014

The slower absorption of employment lands in the Region's employment areas can be partially attributed to the economic recession of 2008 and 2009. There also continues to be a shift from a manufacturing and goods-producing economy to a service and knowledge-based economy in the Region. In addition to these two factors, lower absorption may be explained by other factors, such as decreased vacancy rates in existing employment facilities and increased land costs.

Although absorption rates have declined, York Region continues to experience job growth as noted in the York Region *Employment and Industry Report, 2013* presented to Council in March 2014. Over the past four years, job growth in the commercial sector has outpaced growth in the industrial sector, but both have increased. Manufacturing jobs, in

particular, still comprise one of the largest shares of employment within the Region (16% as of mid-year 2013).

Seventy-three percent (2,168 net hectares) of the 2013 total vacant employment land supply is currently supported by Regional infrastructure

In order to continue attracting high quality employers to the Region, it is important that a diverse and quality selection of employment lands is available. Sites need to offer readily available servicing, a wide variety of sizes and proximity to the 400-series highways and transit stops.

As of mid-year 2013, 2,168 net hectares (or 73% of the total vacant employment land supply) have Regional servicing infrastructure in place to support the provision of municipal services. Of the 2,168 net hectares of vacant lands, 1,336 net hectares have local municipal services in place as well, while 832 net hectares would require extensions to the local water and/or wastewater systems.

Twenty-three percent of the vacant land supply (or 682 net hectares), in the City of Vaughan and the Town of East Gwillimbury, requires the extension of Regional water and wastewater systems to support the provision of municipal services. Projects are currently in progress for the staged delivery of Regional infrastructure to support servicing of these lands. Timelines for this delivery of infrastructure are in *Attachment 4*.

The remaining 4% of the vacant land supply (121 net hectares) is currently IPS lands. These lands have standalone servicing and may not be able to sustain the same level of density as lands with full servicing infrastructure in place. IPS lands are located in the Town of Georgina and the Town of Whitchurch-Stouffville.

Attachment 4 identifies the supply of vacant lands as of mid-year 2013 by servicing availability.

Over 20% of vacant employment land parcels (2,158 net hectares) are greater than 5 hectares

A stock of vacant employment land that includes a variety of site sizes addresses the potential needs of a variety of employers. Findings indicate that vacant parcels 5 hectares or greater account for 23% of all vacant parcels and approximately 73% of the vacant employment land supply. Approximately 37% of the vacant parcels in the inventory are less than 1 net hectare, accounting for just over 4% of the total vacant land area.

Attachment 5 breaks down the supply of vacant land by parcel size and local municipality as of mid-2013.

The majority of the vacant employment land supply is located in close proximity to 400-series highways and transit stops

There is a high demand for employment lands that are strategically located within urban areas near major transportation corridors and transit stops. The 400-series highways are extremely important for employment lands from a strategic location and market accessibility standpoint as they facilitate goods movement and are highly visible locations for major employers. Providing public transportation helps to manage congestion and travel times in the Region and improves the Region's economy by facilitating more efficient movement of residents, workers, goods, and services alike.

Attachment 6 provides detail on the distribution of vacant employment land parcels by distance to 400-series highways, as well as YRT and VIVA transit stops.

There are 533 parcels (or 78% of all vacant employment parcels) within 5 kilometres of a 400-series highway. Of this, 170 parcels, representing almost a quarter of total vacant employment parcels, are within 1 kilometre of a 400-series highway.

Approximately 60% of vacant employment land parcels in the Region are located within 500 metres of either a York Region Transit (YRT) or VIVA transit stop. The *YROP-2010* cites 500 metres as the distance threshold to which 90% of residents within the Urban Area should be situated from a transit stop.

Given the desirability of employment lands that are in strategic locations near major transportation corridors and transit stops, pressure to re-designate this finite supply of lands to other uses will continue to be great. It is important, therefore, to ensure that these strategically located lands are preserved for employment uses over the long term.

Approximately 230 net hectares of employment land have intensification potential as of mid-year 2013

While there are no employment-specific intensification targets set out in the Provincial *Growth Plan*, the intensification of both residential and employment areas is expected to accommodate a portion of new growth.

A preliminary analysis of built parcels with intensification potential was first undertaken in 2006 and used orthophotography to identify built parcels that were:

- Half vacant
- Had vacant portions of at least 0.5 hectares

This analysis was carried forward through to 2013 to estimate the current intensification potential of employment lands and to assess the extent to which expansions or new development has occurred on previously identified intensification potential sites.

There are 118 parcels that have 225 net hectares of intensification potential, up from 2006, when 85 parcels with 175 hectares were identified as having intensification potential.

Between 2006 and 2013, 50 net hectares of land identified as having intensification potential in 2006 were absorbed, and approximately 125 new net hectares of intensification potential were identified. Further details regarding intensification potential on employment lands is provided in *Attachment 7*.

Link to key Council-approved plans

The vacant land portion of the employment land inventory informs a number of goals in the *2011 to 2015 Strategic Plan* strategic priority area of Economic Vitality, one of which is the protection and securement of employment lands along 400 series highways.

The vacant land portion of the employment land inventory also has links to the Protecting Employment Lands policies of the *YROP-2010*, as well as *Vision 2051*'s goal area of An Innovative Economy.

5. FINANCIAL IMPLICATIONS

Employment lands play a central role in the Region's economy.

The availability of a wide range of vacant employment lands is integral to the fiscal health of a community and can directly affect economic development and diversification of the assessment base.

6. LOCAL MUNICIPAL IMPACT

Vacant employment lands from each of the nine local municipalities of York Region are identified and analyzed in this report. Staff from the local municipalities provided input in the delineation of the areas examined.

Local municipalities are key partners in the ongoing preservation and enhancement of employment areas.

7. CONCLUSION

Maintaining a robust and diverse supply of vacant employment lands supports the economic vitality of the Region. As of mid-year 2013, there were 2,972 net hectares of vacant employment lands within designated employment areas, compared to approximately 3,140 net hectares in 2006.

Seventy-three percent of vacant employment lands in the Region as of 2013 have Regional servicing infrastructure in place to support the provision of municipal services. Projects are currently in progress to facilitate the delivery of Regional infrastructure to support municipal servicing on an additional 682 net hectares of vacant employment lands in the Town of East Gwillimbury and the City of Vaughan.

The data within this report will be used in the Region's five-year Municipal Comprehensive Review. The review will include an evaluation of employment and land needs to the year 2041. Regional staff will assess the characteristics of employment land supply in context of the short, medium, and long-term as a component of the review.

For more information on this report, please contact Valerie Shuttleworth, Director Long Range Planning at Ext. 71525 or Paul Bottomley, Manager Policy, Research and Forecasting at Ext. 71530.

The Senior Management Group has reviewed this report.

Attachments (7)

Town of Aurora

Employment Areas and Vacant Parcels

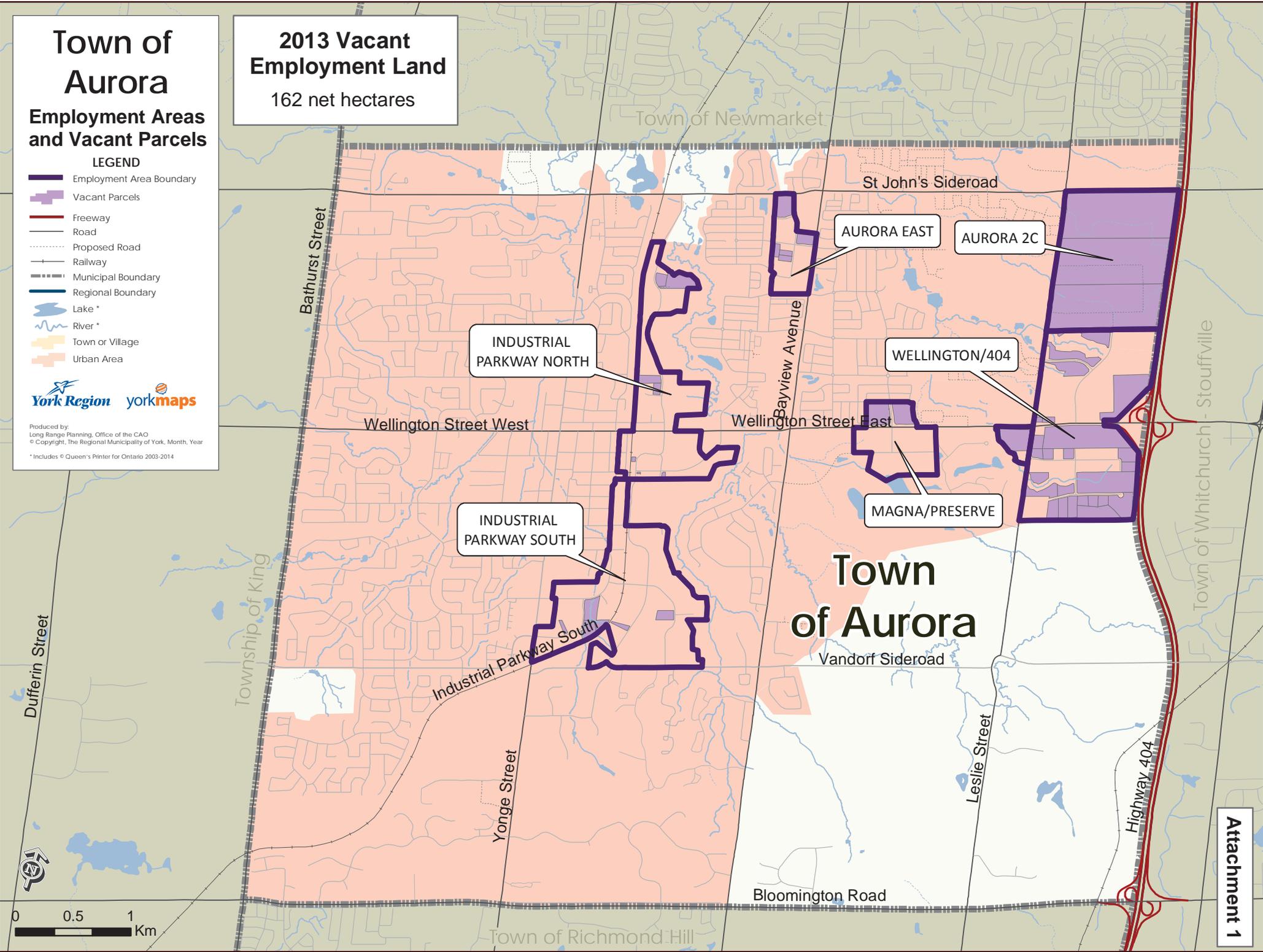
LEGEND

-  Employment Area Boundary
-  Vacant Parcels
-  Freeway
-  Road
-  Proposed Road
-  Railway
-  Municipal Boundary
-  Regional Boundary
-  Lake *
-  River *
-  Town or Village
-  Urban Area



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**2013 Vacant
 Employment Land**
 162 net hectares



INDUSTRIAL
 PARKWAY NORTH

AURORA EAST

AURORA 2C

WELLINGTON/404

MAGNA/PRESERVE

INDUSTRIAL
 PARKWAY SOUTH

**Town
 of Aurora**



Town of East Gwillimbury

2013 Vacant Employment Land
418 net hectares

Employment Areas and Vacant Parcels

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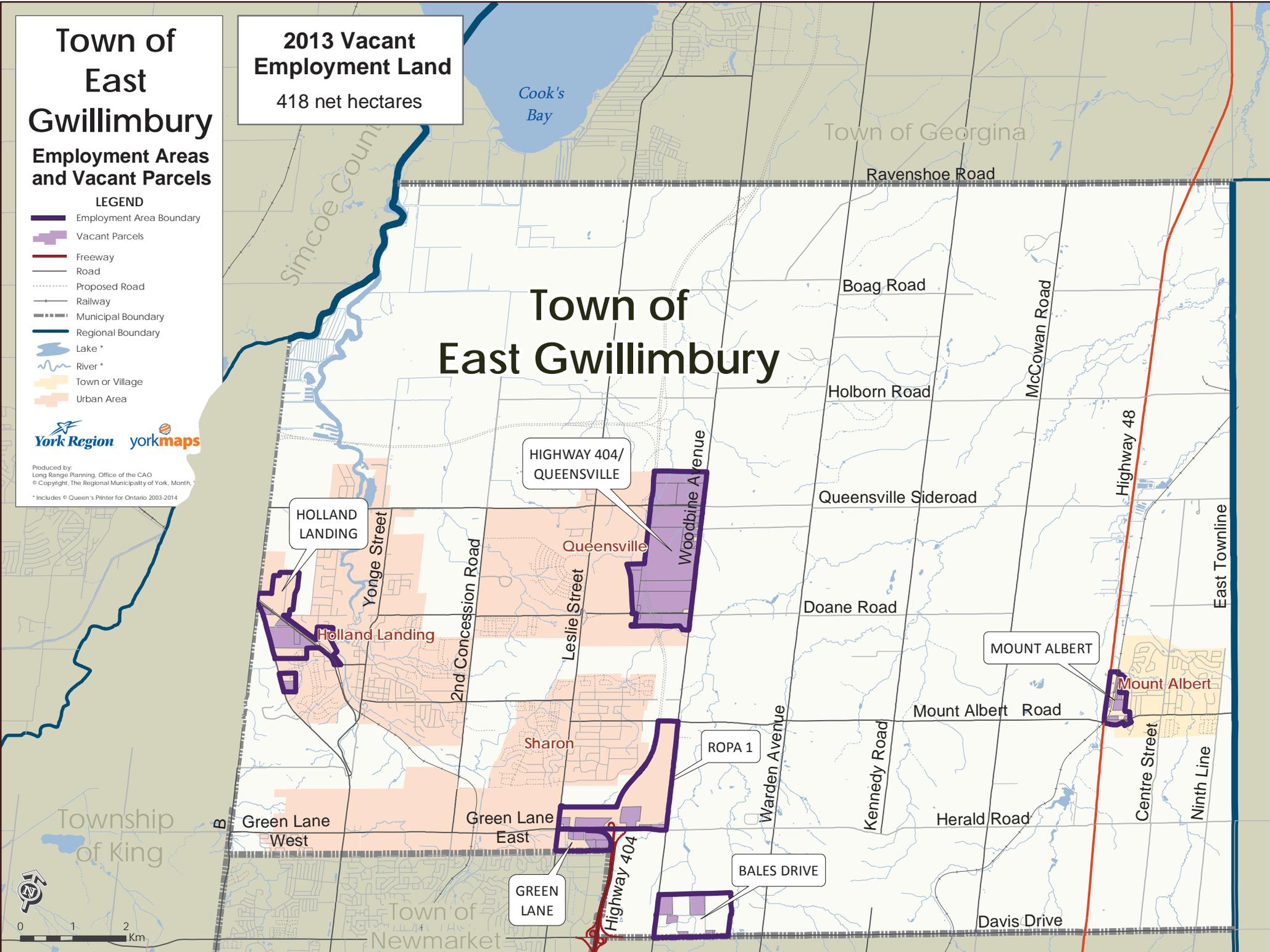
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Town of East Gwillimbury



Town of Georgina

Employment Areas and Vacant Parcels

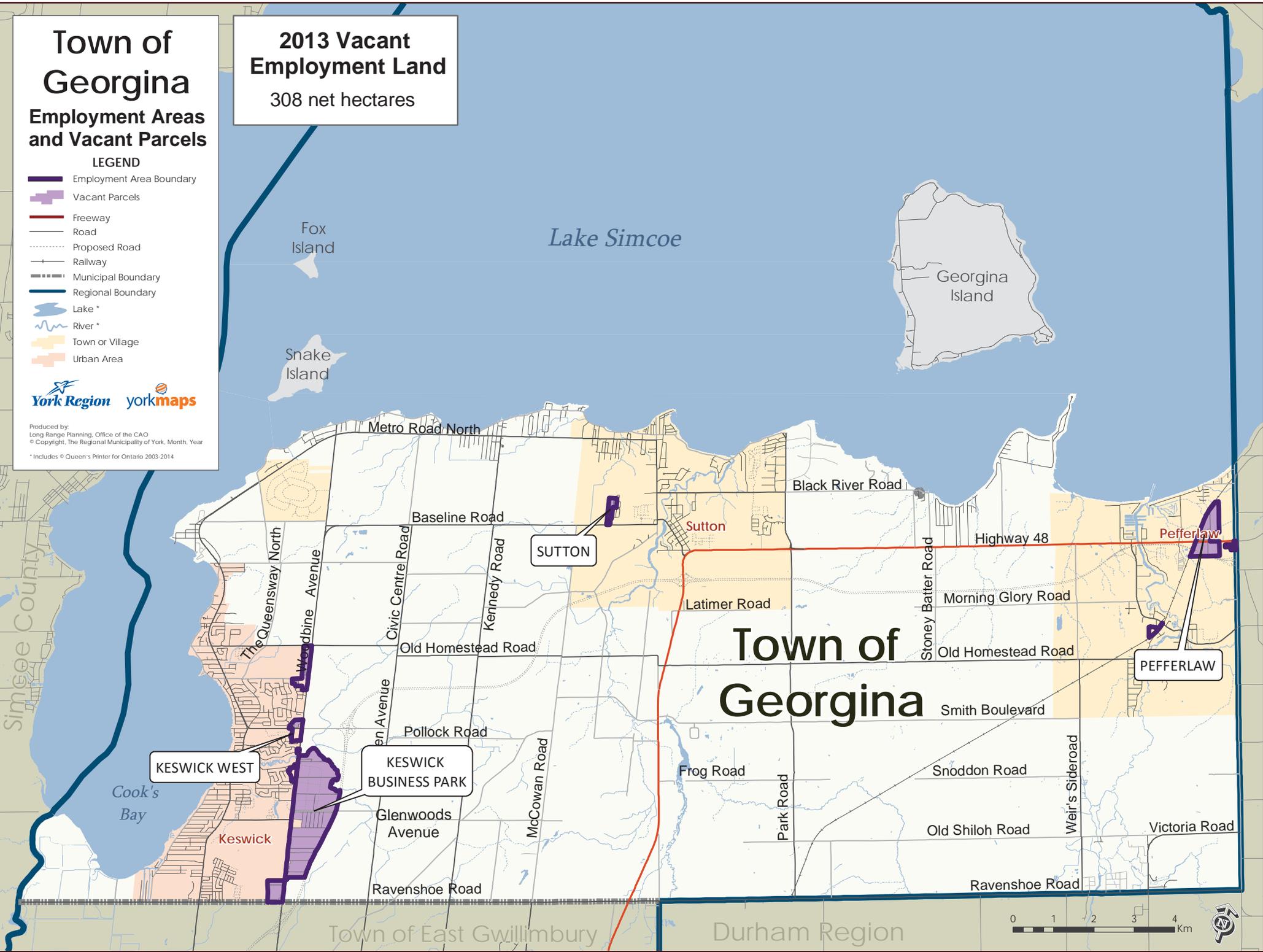
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**2013 Vacant
 Employment Land**
 308 net hectares



Township of King

2013 Vacant Employment Land

75 net hectares

Employment Areas and Vacant Parcels

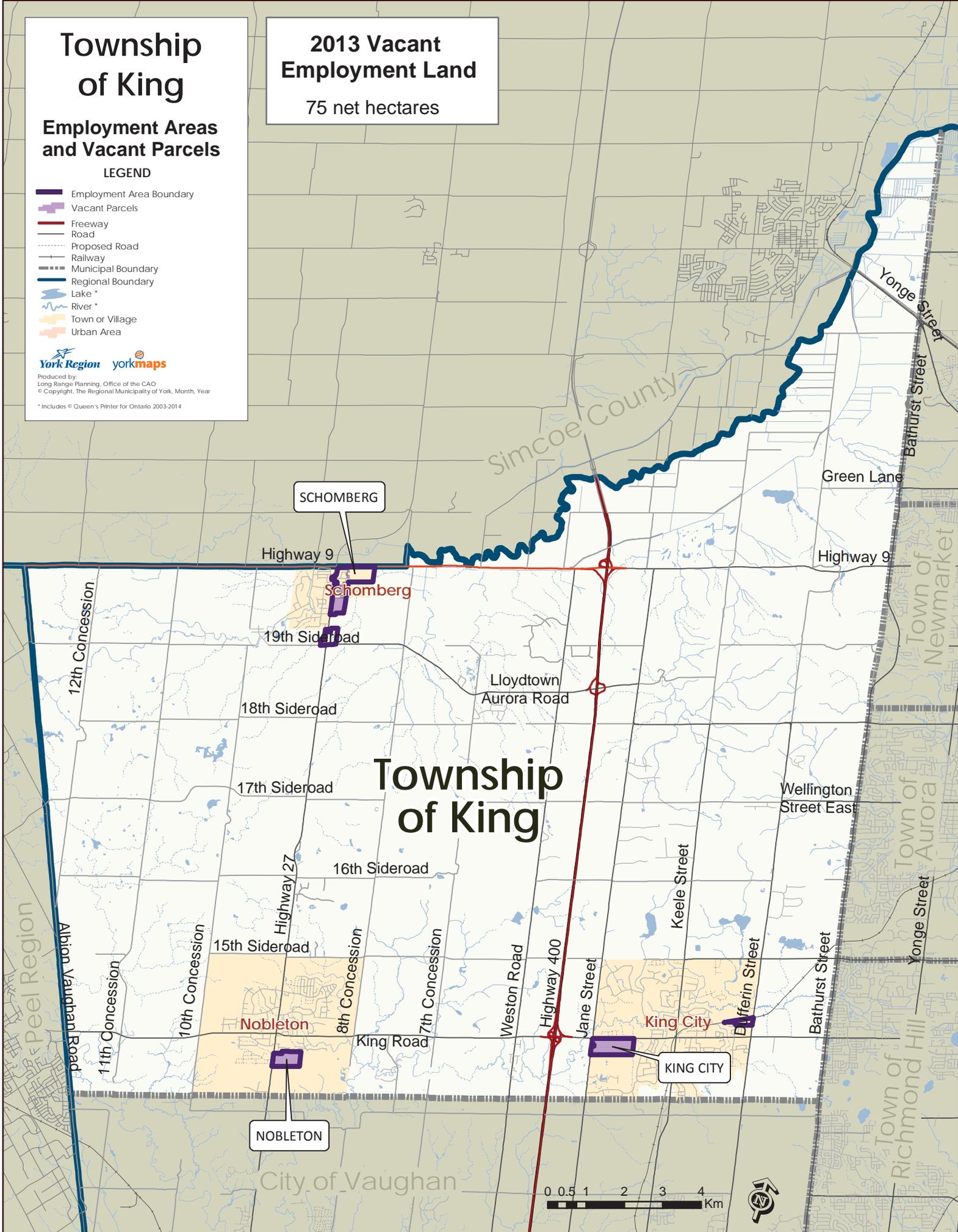
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-  Urban Area

 York Region **yorkmaps**

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City of Markham

Employment Areas and Vacant Parcels

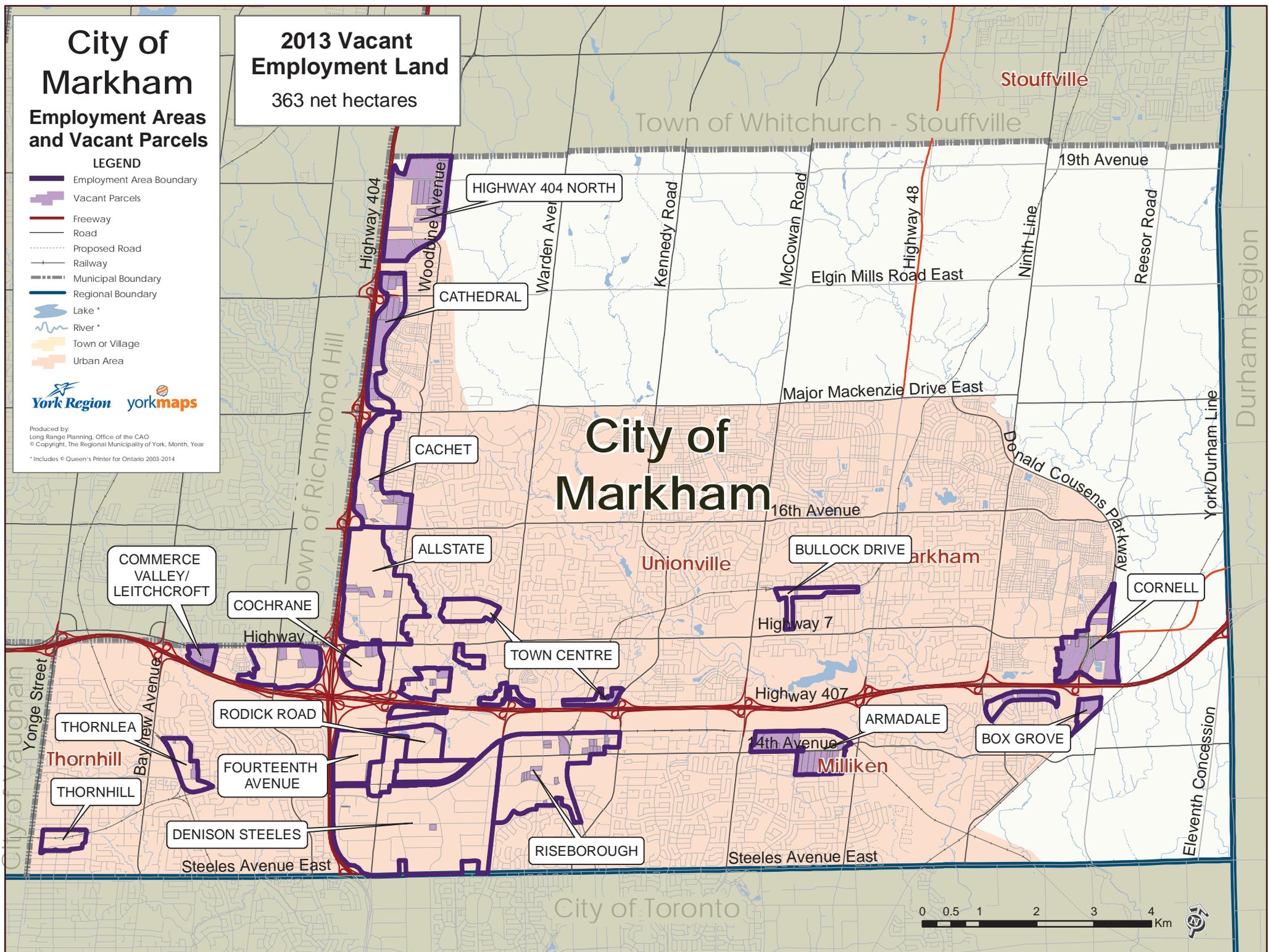
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**2013 Vacant
 Employment Land**
 363 net hectares



Town of Newmarket

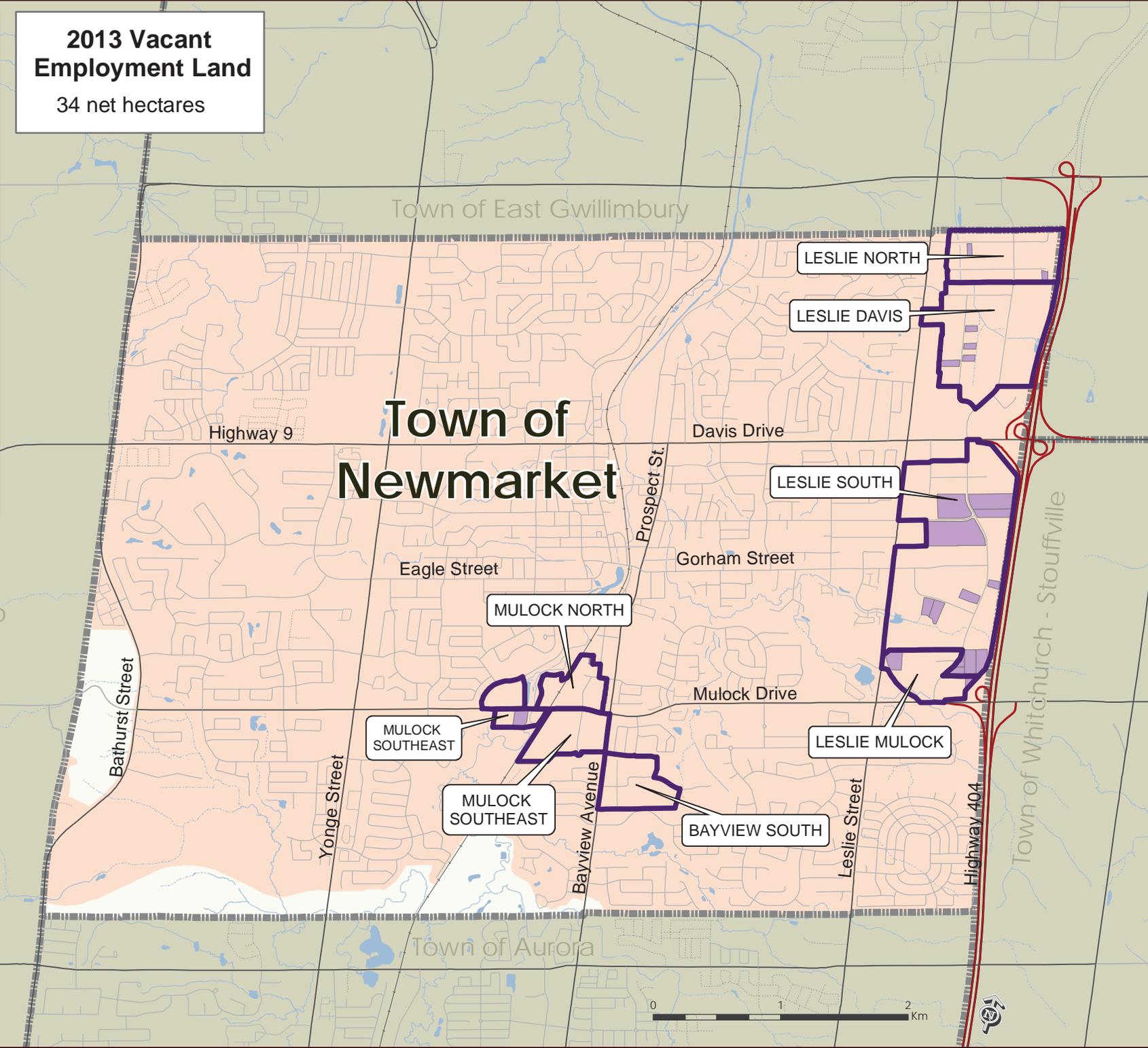
Employment Areas and Vacant Parcels

- LEGEND**
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**2013 Vacant
 Employment Land**
 34 net hectares



Town of Richmond Hill

2013 Vacant Employment Land
160 net hectares

Employment Areas and Vacant Parcels

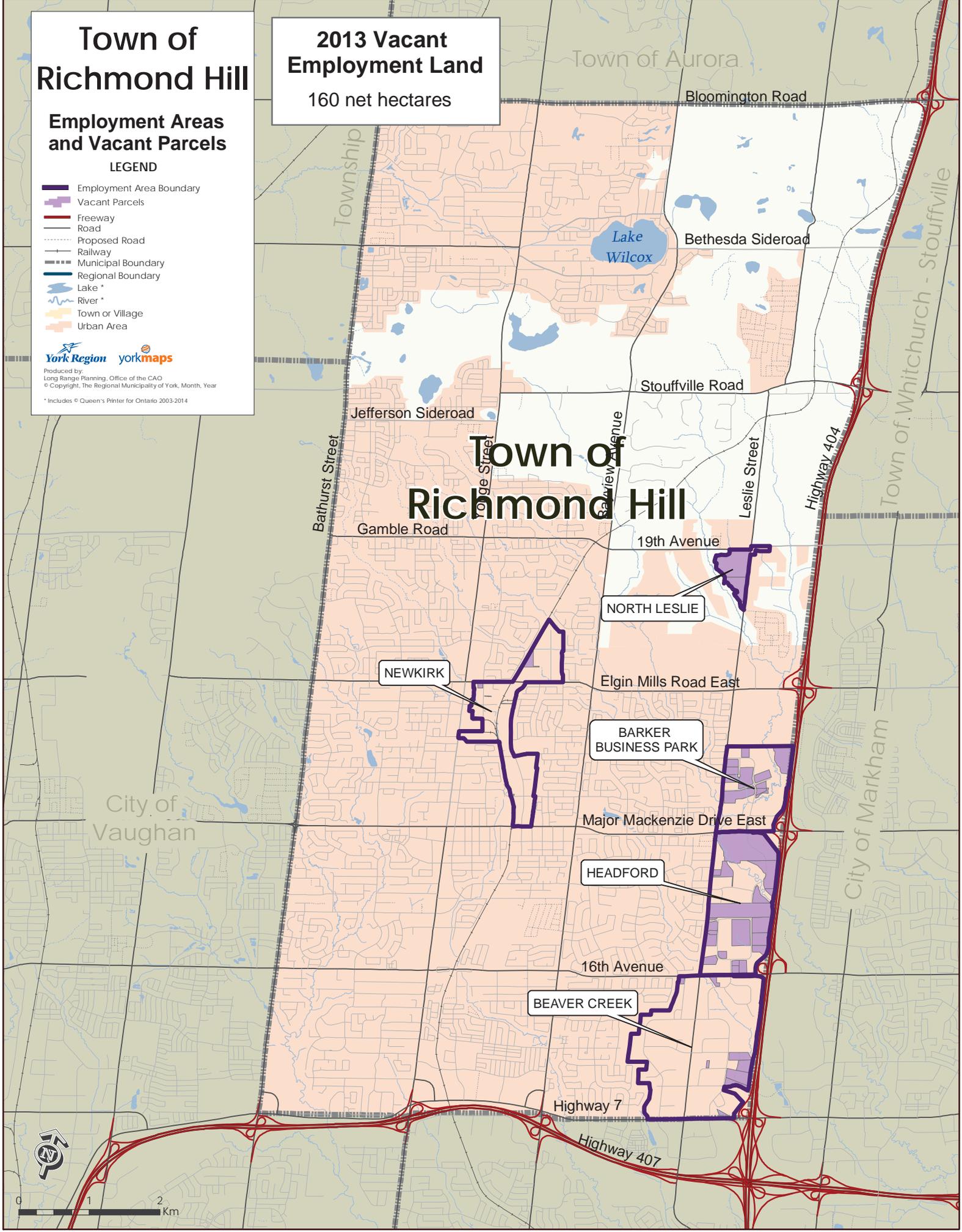
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City of Vaughan

Employment Areas and Vacant Parcels

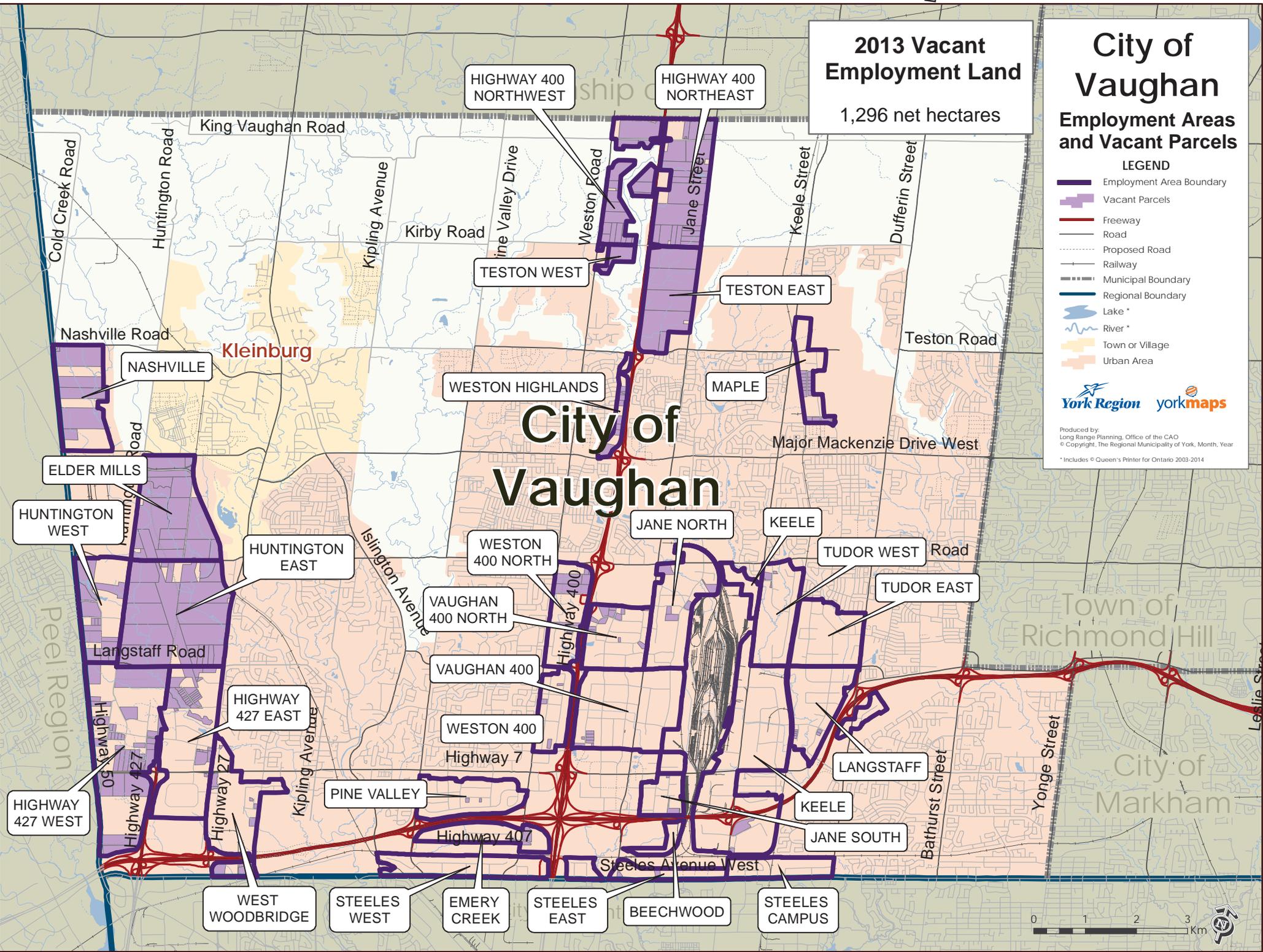
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2013 Vacant Employment Land
 1,296 net hectares



Town of Whitchurch- Stouffville

Employment Areas and Vacant Parcels

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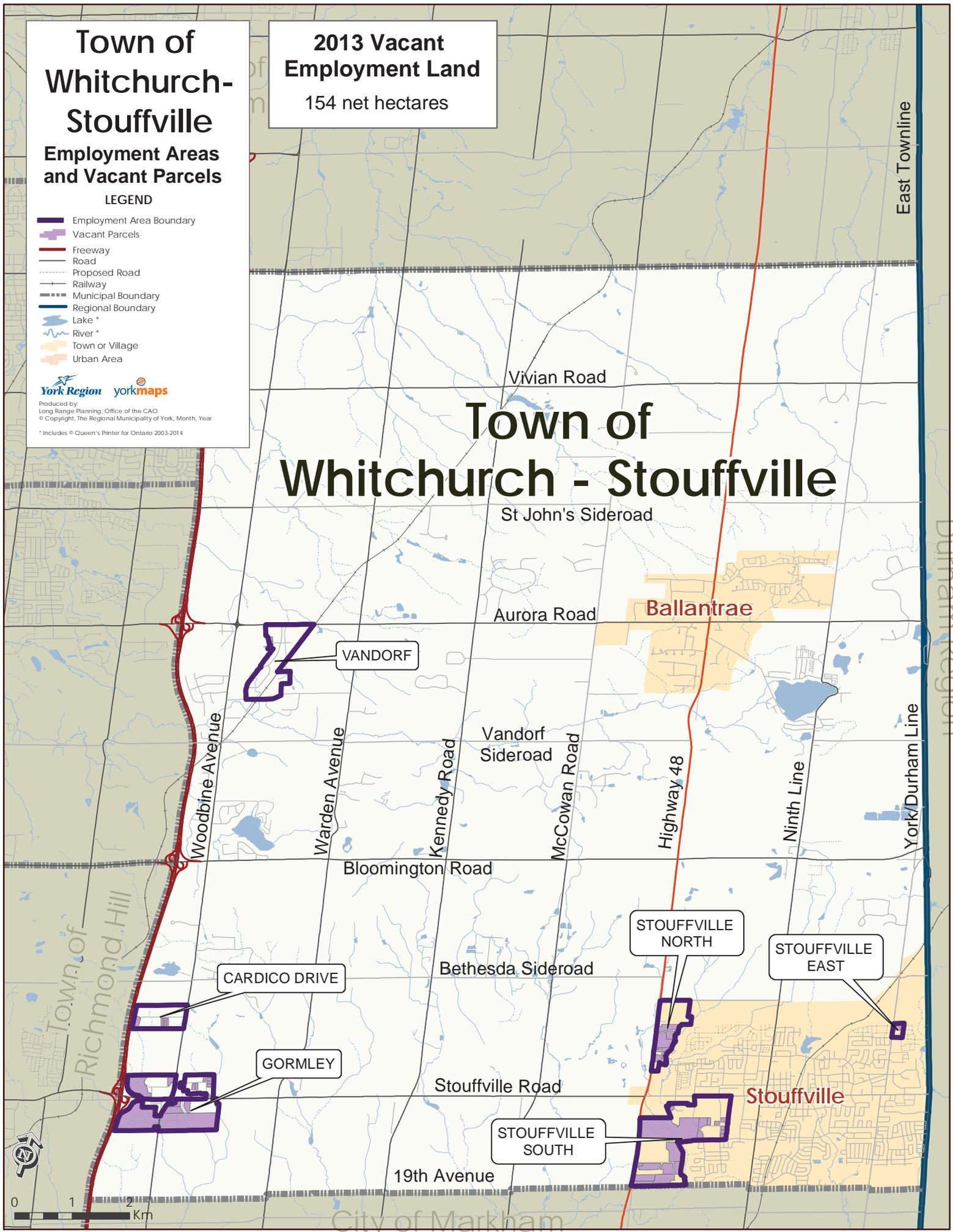
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**2013 Vacant
Employment Land**
154 net hectares

Town of Whitchurch - Stouffville



Explanation of employment types

Employment is typically divided into three main categories for forecasting and analysis purposes:

- **Employment land employment**, defined as employment that geographically occurs within employment areas (business and industrial parks), and includes activities such as manufacturing, research and development, wholesale, and warehousing, but excludes major office employment
- **Major office employment**, which is defined as employment occurring in office buildings 20,000 sq.ft. or larger
- **Population-related employment**, which includes employment that primarily serves the local population, such as retail services, education services, municipal government services, social and community services, medical services, and local office uses

While all three categories can occur within employment areas, the majority is employment land employment. According to the 2013 York Region Employment Survey, approximately half of the jobs in the Region are in employment areas. Other work currently underway, including a retail trends study and major office inventory, focuses on the other employment categories. This report deals only with employment lands.

Definition of area calculations in the Employment Land Inventory

Three types of area calculations are included within the employment land inventory:

- **Gross area** – the total area of each parcel within employment areas;
- **Developable area** – gross area less environmental features and areas, natural heritage systems, major infrastructure and existing uses; and,
- **Net area** – developable area, with a 20% reduction to parcels greater than 25 developable hectares to account for future local roads and stormwater management facilities.

Unless otherwise stated throughout the report, all area calculations are reported in net hectares.

Description of vacant/built status categories in the Employment Land Inventory

The total employment land inventory includes three vacant/built status categories:

- **Vacant** – parcels that are currently vacant. This includes parcels that are not in use as well as parcels currently being used for agricultural purposes.
- **Built** – parcels that are currently in use. This includes parcels that support industrial, major office, parking, and storage uses. Although parking and storage uses may have some redevelopment potential, they have not been included in the vacant analysis.
- **Other** – parcels that are being used for non-employment uses such as road right-of-ways, stormwater management ponds, natural heritage features, legal non-conforming residential, and other infrastructure such as water towers and hydro corridors.

Refinements to employment land areas since the March 2010 land budget

In addition to the addition of new employment areas into the regional inventory, a number of refinements resulting in minor additions and removals were also made to existing employment areas within the inventory since the March 2010 land budget. These refinements were predominately realignments of employment area boundaries to more accurately reflect existing employment uses based on local municipal input.

In addition to these refinements, lands have been removed from the inventory as follows:

- Approximately 17 net hectares in East Gwillimbury based on the local municipal comprehensive review (2013)
- Approximately 63 net hectares in Vaughan based on the local municipal comprehensive review (2011)
- Approximately 25 net hectares in Aurora, Markham, Richmond Hill and Vaughan to allow for major retail and residential uses.

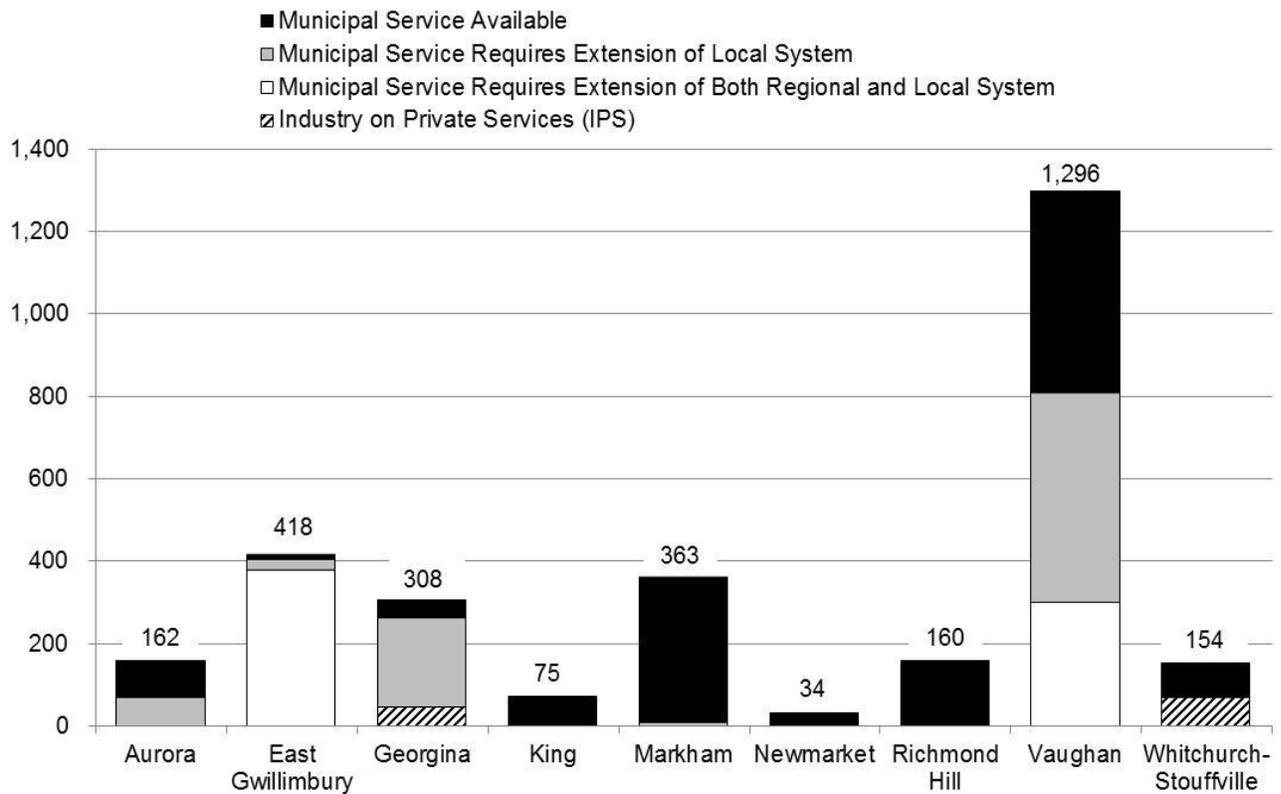
It should be noted that while major retail developments have been removed from employment areas in some cases, other legacy major retail and commercial developments remain on employment lands. These locations will be further analyzed in the upcoming built employment land inventory report.

Planned infrastructure delivery to employment lands

- ROPA 1 Employment Area in East Gwillimbury - 2015
- Holland Landing Employment Area in East Gwillimbury - 2015
- Queensville Employment Area in East Gwillimbury - 2021
- ROPA 52 Employment Areas north of Kirby Road (Highway 400 Northeast and Highway 400 Northwest) in Vaughan - 2021

The timing of infrastructure completion as indicated above is based on the 2014 10-year Capital Program and is subject to change.

Vacant Employment Land by Servicing Availability and Local Municipality, 2013



Source: York Region Office of the Chief Administrative Officer, June 2014

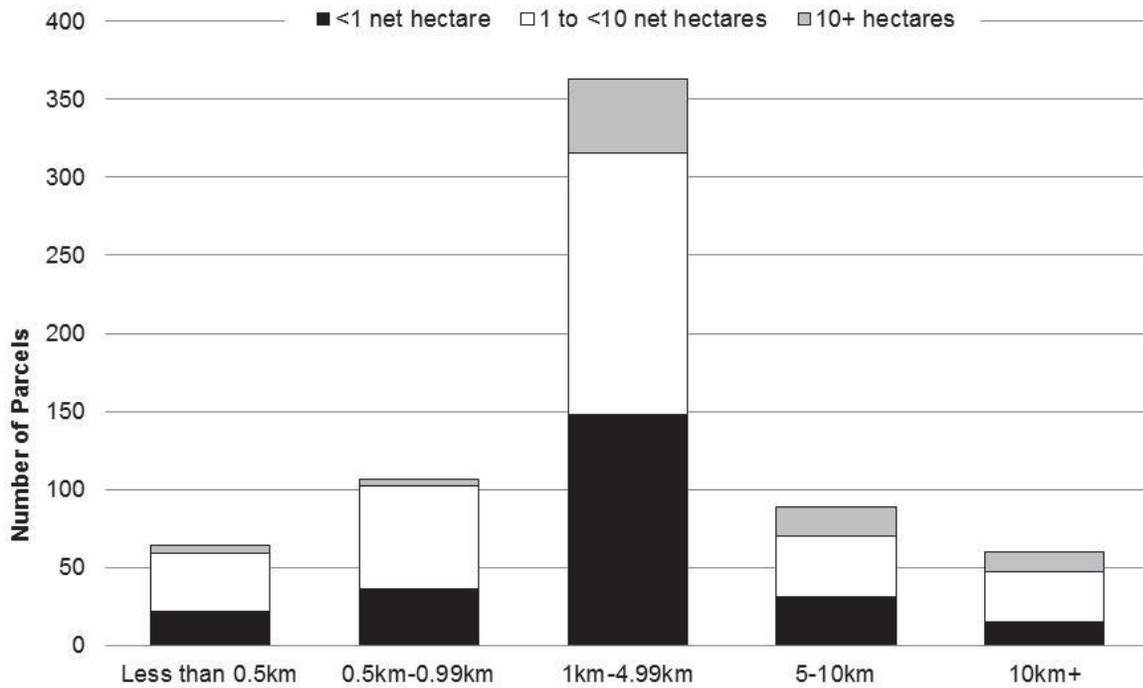
**Supply of Vacant Employment Lands by Site Size and Local Municipality,
York Region, 2013**

	Less than 0.5 ha		0.5 ha to 1.0 ha		1.0 ha to 5.0 ha		Greater than 5.0 ha		Total	
	<i>Parcels</i>	<i>Hectares</i>	<i>Parcels</i>	<i>Hectares</i>	<i>Parcels</i>	<i>Hectares</i>	<i>Parcels</i>	<i>Hectares</i>	<i>Parcels</i>	<i>Hectares</i>
Aurora	8	2	12	9	23	52	6	99	49	162
East Gwillimbury	9	2	8	6	24	61	22	350	63	418
Georgina	2	1	3	2	13	41	17	264	35	308
King	7	3	4	3	3	4	3	65	17	75
Markham	18	5	25	19	66	170	15	170	124	363
Newmarket	8	3	4	3	10	20	1	8	23	34
Richmond Hill	11	2	8	7	19	44	11	107	49	160
Vaughan	55	16	42	30	102	256	72	993	271	1,296
Whitchurch-Stouffville	11	4	17	11	16	39	7	101	51	154
York Region	129	36	123	90	276	688	154	2,158	682	2,972

Source: York Region Office of the Chief Administrative Officer, June 2014

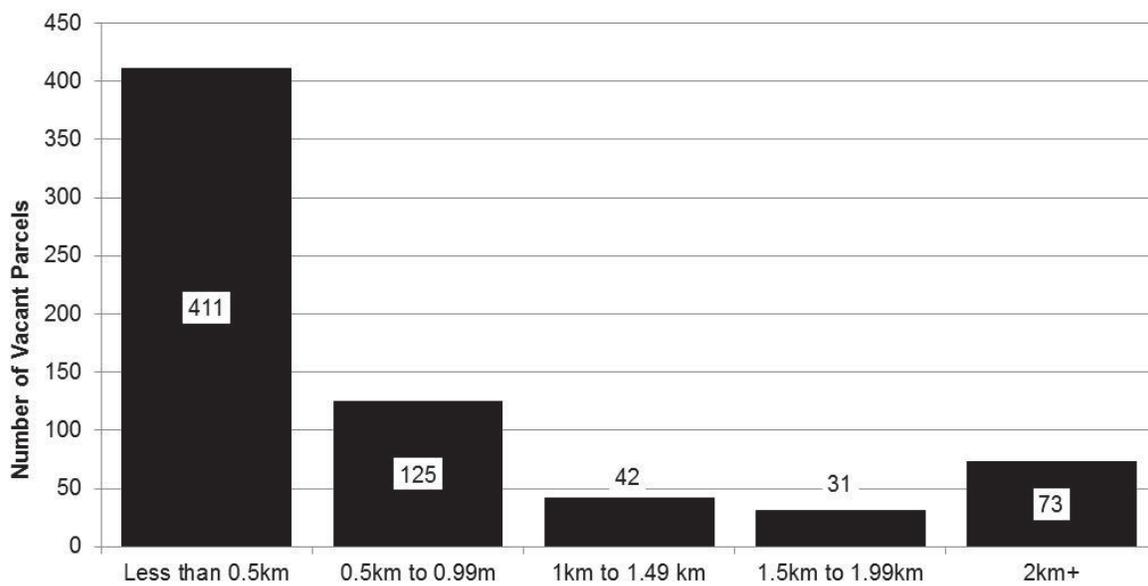
Larger vacant sites provide the opportunity for major employers to locate within the Region. Although there is a healthy supply of these larger vacant sites, it is notable that 39 parcels greater than 5 net hectares, which comprise approximately 20% (580 net hectares) of the vacant employment land supply, will require extensions to both Regional and local systems to facilitate municipal servicing.

Supply of Vacant Employment Land by Site Size and Proximity to 400-Series Highways, York Region, 2013



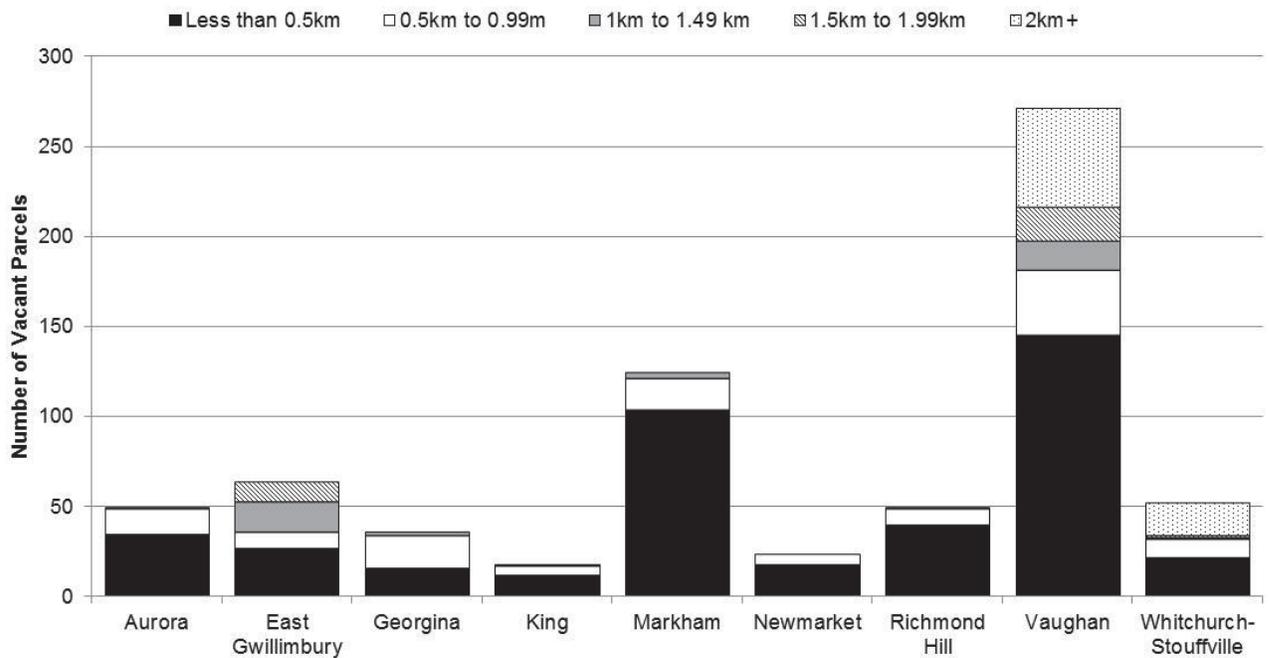
Source: York Region Office of the Chief Administrative Officer, June 2014

Supply of Vacant Employment Land by Proximity to a York Region Transit (YRT) Stop, York Region, 2013



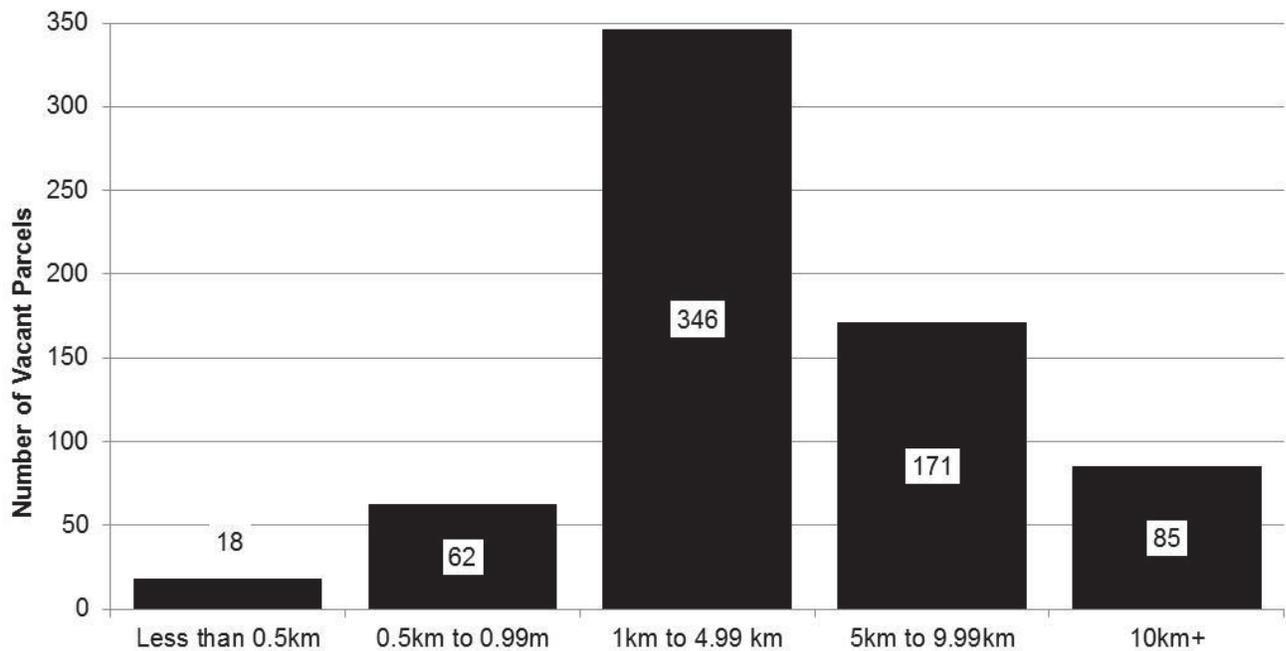
Source: York Region Office of the Chief Administrative Officer, June 2014

Vacant Land by Proximity to a York Region Transit Stop, 2013



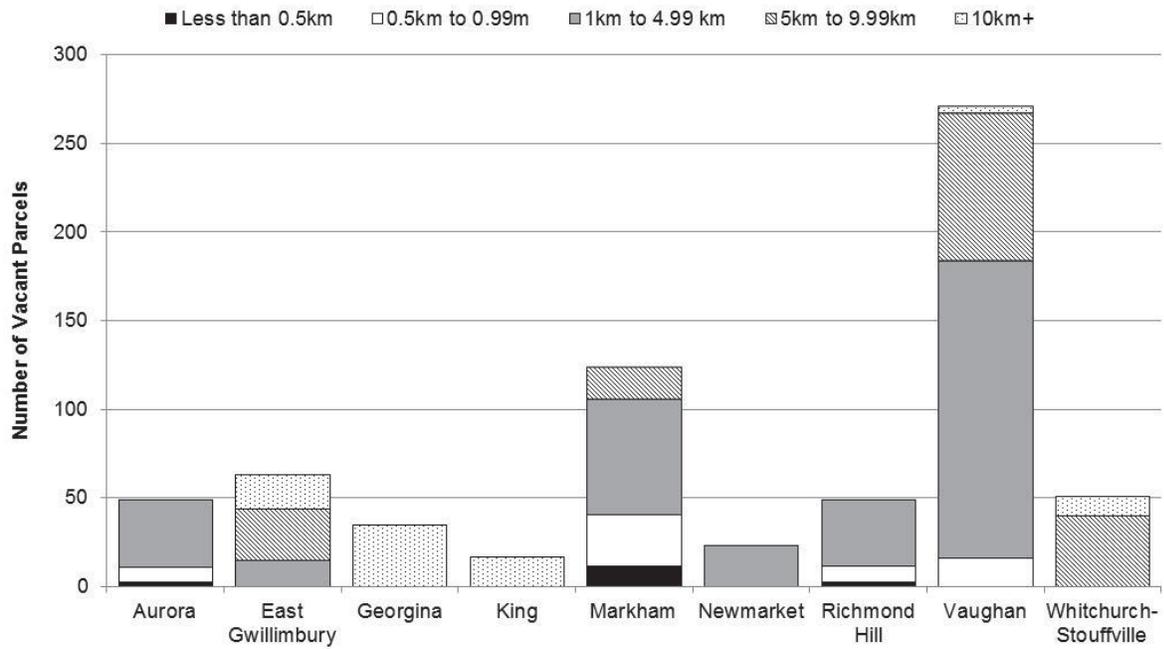
Source: York Region Office of the Chief Administrative Officer, June 2014

Supply of Vacant Employment Land by Proximity to a VIVA Stop, York Region, 2013



Source: York Region Office of the Chief Administrative Officer, June 2014

Vacant Land by Proximity to a VIVA Transit Stop, 2013



Source: York Region Office of the Chief Administrative Officer, June 2014

Intensification Potential on Employment Lands

The figure below displays an example of a 2006 employment land parcel with intensification potential developed in 2011.

Example of 2006 Parcel with Intensification Potential Developed in 2011



Source: York Region Office of the Chief Administrative Officer, June 2014

There are a number of considerations that impact the intensification potential of employment area parcels, such as:

- Road access
- Site specific requirements, such as space required to meet parking requirements space required for loading docks, landscaping requirements, etc.
- Land use compatibility with neighbouring uses (i.e., sensitive uses nearby)
- Parcel and building configurations that may limit the development potential of a site
- Landowner preference

Predicting job growth on parcels with intensification potential is difficult to determine as a result of these factors.