

# Peel Goods Movement

## Goods Movement Intensification Assessment



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## EXECUTIVE SUMMARY

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The Region of Peel retained Watson & Associates Economists Ltd., and WSP Parsons Brinckerhoff, hereafter referred to as the Consultant Team, in 2016 to prepare a business case analysis with respect to the development of a proposed Peel Enterprise Zone (PEZ) within the Region of Peel. In addition to the PEZ business case analysis, the Region of Peel has also requested that the Consultant Team provide an assessment of the opportunities and challenges regarding employment intensification within the Region's established, designated employment areas that are concentrated in the Goods Movement sector.<sup>1</sup> This analysis is intended to complement the PEZ business case analysis and aims to provide a balanced perspective with respect to future employment growth in the Region of Peel related to the Goods Movement sector that considers both greenfield development and redevelopment/infill opportunities.

A key objective of this study is to provide a better understanding of recent industry trends that are shaping development patterns in the Goods Movement sector. These trends are then reviewed against existing conditions within Peel Region's established employment areas that are well-suited for employment intensification related to Goods Movement employment. This is then followed by a detailed evaluation of future development opportunities and challenges in the Goods Movement sector within selected priority employment areas in Peel Region.

This report builds on the objectives of the Peel Region Goods Movement Strategic Plan 2017-2021, which represents a five-year blueprint for action regarding Goods Movement in Peel Region.<sup>2</sup> The Peel Region Goods Movement Strategic Plan 2017-2021 is intended to identify strategic directions, initiatives and outcomes that increase efficiency and mitigate health and environmental impacts associated with Goods Movement in Peel Region. Ultimately, a key aspect of the Goods Movement Strategic Plan is to develop outcomes that guide land use and transportation planning efforts in Peel Region and support the vision of the Peel Region Goods Movement Task Force.

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<sup>1</sup> Provincial Policy Statement and Growth Plan refers to intensification as the development of a property, site or area at a higher density than currently exists through: redevelopment; the development of vacant and/or underutilized lots; infill development; expansion or conversion of buildings.

<sup>2</sup> Peel Region Goods Movement Strategic Plan 2017-2021. March 2017.

It is recognized that efforts to improve land utilization in Peel's established employment areas support the broader objectives of the Peel Region Goods Movement Strategic Plan 2017-2021. These efforts, however, must be coordinated with the other on-going Action items identified in the Plan that focus on strategic improvements to Goods Movement infrastructure.

Across North America, the Goods Movement industry is continuously evolving at a rapid pace. This evolution has been driven in response to the growing demands of industrial and retail customers and individual consumers to receive goods faster, with greater flexibility and, in the case of consumers, at low or no delivery cost.<sup>3</sup> Today, e-commerce represents the biggest driver of change in the Goods Movement industry, driven by the rapid growth of mobile technology. E-commerce sales in Canada have grown at a rate that is five times the pace of overall growth in retail trade. Online sales account for 6% of total Canadian retail spending. By comparison, U.S. online sales account for 9% of total spending.<sup>4</sup> Delivery expectations within this sector are increasing on an annual basis.

Looking forward, it is expected that changing consumer behavior, combined with innovation and technology, will continue to shape the future of the Goods Movement industry. These trends are anticipated to generate growing opportunities for new and expanded Goods Movement operations in both Peel's established and new employment areas. Key industry trends explored herein include:

- Just-in-time manufacturing and the growing demand for fast and accurate delivery services related to the expanded e-commerce market;
- Advancements in automation and robotic technology;
- Autonomous trucking technology;
- Last mile logistics and infill logistics facilities; and
- Reverse logistics.

Further to the above, it is noted that a key focus of the Peel Region Goods Movement Strategic Plan 2017-2021 is sustainability. More specifically, this relates to building strong, sustainable, resilient communities by addressing climate change (i.e. reducing greenhouse gas emissions through alternative fuels and fuel efficiency initiatives), increasing efforts regarding education and outreach, as well as integrating land use planning efforts focused on freight

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<sup>3</sup> Shifting patterns. The future of the logistics industry. PwC. 2016

<sup>4</sup> Purolator Logistics. Adapting your Canadian Supply Chain for E-commerce Efficiency. 2015

and Goods Movement.<sup>5</sup> These strategic objectives directly support efforts in Peel Region and its local municipalities to encourage employment intensification, where appropriate, related to the Goods Movement sector.

While employment intensification is a challenging topic to assess and quantify, this study provides a first step in understanding how anticipated trends in the Goods Movement industry may impact the future of the industrial real estate market. Provided with a description of existing conditions within Peel's established employment areas, the Region is able to more clearly assess what the future opportunities and challenges are regarding employment intensification related to the Goods Movement sector.

The following conclusions are drawn from this analysis:

1. The vast majority of the Region's employment lands are located in direct proximity to one or more 400-series highways or controlled access highways in Peel. The Region's largest established employment areas are concentrated around the Toronto Pearson International Airport (TPIA) in Mississauga and the CN Intermodal yard in Brampton (see Appendix A).
2. Peel Region's employment areas accommodate approximately 100,400 employees related to the Goods Movement sector. This represents the largest concentration of employment related to the Goods Movement sector in the Greater Toronto Hamilton Area (GTHA).<sup>6</sup>
3. Through a Region-wide evaluation, the Northeast Employment Area and the Gateway Employment Area in Mississauga, and the Bramalea Employment Area in Brampton were identified as priority areas for employment intensification related to the Goods Movement sector. Collectively, these employment areas comprise over 60% of existing jobs on employment lands in Peel related to the Goods Movement sector.
4. Over the long term (i.e. years 2031 and 2041), employment intensification within the three consolidated employment areas identified above is anticipated through redevelopment, expansions, infill and re-occupation of vacant industrial buildings.
5. Our analysis indicates that some infill opportunities may exist on large vacant sites (i.e. greater than 5 ha). In total, eight vacant sites were identified within the priority employment areas that are five hectares or greater in land area. While some of these sites may pose development challenges due to configuration and access issues, most sites identified appear to offer opportunities for development related to the Goods Movement sector. It is noted that development applications have been filed for several of the large vacant sites reviewed.

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<sup>5</sup> Peel Region Goods Movement Strategic Plan 2017-2021.

<sup>6</sup> Accounting for all off-site employment; this figure is expected to increase.

6. Redevelopment potential with the priority employment areas is hard to gauge, given uncertainty with respect to future expansions and redevelopment plans of existing and/or prospective industries. Of the priority sites reviewed, the Gateway Employment Area offers the greatest potential to accommodate Goods Movement businesses within existing facilities given the size and age of the existing building stock.
7. Expansion potential is also difficult to gauge given the uncertainty associated with expansion plans of existing businesses. It has been identified that the Bramalea Employment Area currently has a relatively low average building coverage for single-tenant Goods Movement parcels of approximately 33%, which may support future expansion on developed sites.
8. Industrial vacancy rates are currently very low in Peel's employment areas. For the priority employment areas identified herein, average industrial vacancy rates are 1% or less. It is noted that the industry trends identified in section 1 suggest that long-term technological factors, such as autonomous vehicles, may generate further demand for warehouse consolidation – a trend which is already observed in today's real estate market. This may generate future intensification opportunities and challenges in Peel's established employment areas as existing facilities are consolidated.
9. Our review of density trends within occupied industrial buildings within the past several years suggests that employment intensification in the industrial sector is likely to be minimal over the next decade and beyond. This suggests that additional employees are not likely to be added to existing Goods Movement businesses in the near to longer term.

# 1. INTRODUCTION

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## 1.1 Terms of Reference

The Region of Peel retained Watson & Associates Economists Ltd., and WSP Parsons Brinckerhoff, hereafter referred to as the Consultant Team, in 2016 to prepare a business case analysis with respect to the development of a proposed Peel Enterprise Zone (PEZ) within the Region of Peel. In addition to the PEZ business case analysis, the Region of Peel has also requested that the Consultant Team provide an assessment of the opportunities and challenges regarding employment intensification within the Region's established, designated employment areas that are concentrated in the Goods Movement sector.<sup>7</sup> This analysis is intended to complement the PEZ business case analysis and aims to provide a balanced perspective with respect to future employment growth in the Region of Peel related to the Goods Movement sector that considers both greenfield development and redevelopment/infill opportunities.

There are three primary objectives to this study. The first objective is to provide a better understanding of recent industry trends that are shaping development patterns in the Goods Movement sector. The second objective is to broadly review the Region's designated employment areas to determine which areas may be best suited to accommodate additional employment intensification opportunities that relate to the Goods Movement sector. A total of three established employment areas were identified within the Region as priority areas that warrant further consideration and review. Lastly, a more detailed evaluation of future Goods Movement development opportunities and challenges has been provided for each of the priority employment areas identified.

To assist the Region of Peel in assessing future intensification potential within the Goods Movement sector, this report addresses the following major discussion topics:

- A brief overview of recent industry trends related to logistics, warehousing and transportation, as well as existing conditions regarding the Goods Movement employment sector in Peel Region;

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<sup>7</sup> Provincial Policy Statement and Growth Plan refers to intensification as the development of a property, site or area at a higher density than currently exists through: redevelopment; the development of vacant and/or underutilized lots; infill development; expansion or conversion of buildings.

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- The establishment of criteria for evaluating Peel Region's employment areas that may be suitable for employment intensification associated with the Goods Movement sector; and
- A strength, weaknesses, opportunities, and constraints (SWOC) analysis used to identify priority intensification areas that are best suited for Goods Movement development within Peel.

## 1.2 Background

As previously mentioned, the purpose of this assignment is to explore future opportunities associated with employment intensification associated with the Goods Movement sector within Peel Region's established employment areas. As identified in Appendix A, these areas are largely located within the City of Mississauga and the City of Brampton.

This report builds on the objectives of the Peel Region Goods Movement Strategic Plan 2017-2021, which represents a five-year blueprint for action regarding Goods Movement in Peel Region.<sup>8</sup> The Peel Region Goods Movement Strategic Plan 2017-2021 is intended to identify strategic directions, initiatives and outcomes that increase the efficiency and mitigate health and environmental impacts associated with Goods Movement in Peel Region. Ultimately, a key aspect of the Goods Movement Strategic Plan is to develop outcomes that guide land use and transportation planning efforts in Peel Region and support the vision of the Peel Region Goods Movement Task Force.

It is recognized that efforts to improve land utilization in Peel's established employment areas support the broader objectives of the Peel Region Goods Movement Strategic Plan 2017-2021. These efforts, however, must be coordinated with the other on-going Action items identified in the Plan that focus on strategic improvements to Goods Movement infrastructure.

### 1.2.1 Goods Movement Sector Defined

Goods Movement refers to the transportation system, infrastructure, and policy that enables the movement of goods and services. The Goods Movement sector includes air, rail, water, pipeline, and truck transportation industries, as well as warehousing, storage and logistics companies, and support activities for transportation (including numerous public agencies, private firms, and individual shippers and receivers). For the purpose of this analysis, the Goods Movement sector is defined as Wholesale Trade as well as Transportation and

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<sup>8</sup> Peel Region Goods Movement Strategic Plan 2017-2021. March 2017.



Warehousing in accordance with the 2017 North American Classification System (NAICS).<sup>9</sup>

### **1.2.3 Importance of Goods Movement Sector**

The Goods Movement sector forms an integral part of Peel Region's economic development and employment growth potential. Peel Region comprises a high concentration of Goods-Movement-related industries which contribute significantly to the local, provincial and national economies. Freight transportation, warehousing and manufacturing account for approximately one-quarter of Peel's employment base and a significant share of industrial development activity over the past decade has been in the Goods Movement sector.

Peel Region is home to over 2,000 trucking companies, which represents 25% of all truck activity in Ontario and accounts for approximately \$1.8 billion worth of Goods Movement through Peel every day.<sup>10</sup> Goods Movement is the largest industrial employment growth sector within the GTHA and Peel Region. To maintain its competitive edge, Peel Region must ensure the efficient movement of goods through and within the Region to attract industry and investments.<sup>11</sup>

### **1.2.2 Industry Trends Shaping the Goods Movement Sector**

Across North America, the Goods Movement industry is continuously evolving at a rapid pace. This evolution has been driven in response to the growing demands of industrial and retail customers and individual consumers to receive goods faster, with greater flexibility and, in the case of consumers, at low or no delivery cost.<sup>12</sup> Today, e-commerce represents the biggest driver of change in the Goods Movement industry, driven by the rapid growth of mobile technology. E-commerce sales in Canada have grown at a rate that is five times the pace of overall growth in retail trade. Online sales account for 6% of total Canadian retail spending. By comparison, U.S. online sales account for 9% of total spending.<sup>13</sup> Delivery expectations within this sector are increasing on an annual basis.

Looking forward, it is expected that changing consumer behavior, combined with innovation and technology, will continue to shape the future of the Goods

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<sup>9</sup> Refer to NAICS codes 41 and 48-49.

<sup>10</sup> Peel Goods Movement, Strategic Goods Movement Network Study Technical Report, April 25, 2013, Region of Peel.

<sup>11</sup> Peel Region Goods Movement Strategic Plan 2012-2016. Status Update. June, 2014.

<sup>12</sup> Shifting patterns. The future of the logistics industry. PwC. 2016

<sup>13</sup> Purolator Logistics. Adapting your Canadian Supply Chain for E-commerce Efficiency. 2015.

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Movement industry. These trends are anticipated to generate growing opportunities for new and expanded Goods Movement operations in Peel's established and new employment areas. These trends are briefly described below.

- **Just-in-time manufacturing** and the growing demand for fast and accurate delivery services related to the expanded e-commerce market will continue to increase demands for cross-docked parcel delivery centres (PDCs). Cross-dock facilities can reduce the amount of warehouse space required around urban areas where land costs are typically high, and allow for greater speed and responsiveness in delivery. Future development opportunities for these facilities over regional distribution centres may exist within the Region's established employment areas, given land costs and the lack of larger vacant sites. The sizes of these facilities typically range between 5,000 and 10,000 sq.m (55,000 and 110,000 sq.ft.) depending on the number of loading doors; however, smaller units can operate with approximately 3,000 sq.m (32,000 sq.ft.) of internal space. It is noted that average building coverage levels for cross-docked facilities are typically low in order to accommodate a high volume of vehicle movement.<sup>14, 15</sup>
- **Advancements in warehouse automation and robotic technology** continue to significantly impact the logistics real estate market. Using automated logistics solutions and robotic systems improves efficiency and reduces the requirement for daylight or height limits of warehouse space, thus allowing for more vertical storage. Vertical storage and increased automation also reduces the distance inside warehouses, further speeding up the delivery process.<sup>16</sup> Similar to cross-dock facilities, Peel's established employment areas are anticipated to be attractive to vertical storage solutions where average market rents and land costs are high, and the availability of large vacant sites is limited.
- **Autonomous trucking technology** is currently being tested worldwide. A key driver of this technology is the reduction of transportation costs (i.e. labour) combined with improved road safety. Although the full implementation of driverless trucks remains far ahead in the future, advances in technology have come quicker than expected. Overall, the logistics industry is expecting driver-less trucks by 2025. Autonomous

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<sup>14</sup> CBRE EMEA ViewPoint. May 2013. Parcel Delivery Centres: A Growth Opportunity.

<sup>15</sup> Cross-docking is a practice in the logistics of unloading materials from an incoming semi-trailer truck or railroad car and loading these materials directly into outbound trucks, trailers, or rail cars, with little or no storage in between.

<sup>16</sup> Transformation of the Global Supply Chain. Automated Technology: Driving Change in Real Estate. CBRE. 2016.

trucking technology is likely to affect industrial real estate in several ways. Lower transportation costs are anticipated to drive the need for fewer, but larger, consolidated warehouses in locations where land costs are lower.<sup>17</sup> This has the potential to impact the need for new and existing warehousing facilities within the Region's employment areas. The rise of autonomous trucking technology may support further building consolidation within the Region's established employment areas, generating employment intensification opportunities in related or other industrial and commercial sectors.

- **Last Mile Logistics and Infill Logistics Facilities** – The last mile represents the final transportation of goods from the distribution centre or fulfillment hub to the final destination (i.e. the retailer or consumer). As the e-commerce market continues to expand, this component of the supply chain is becoming increasingly important to businesses as it has a direct influence on the customer experience. In addition to the need to provide timely, accurate service delivery, it is also critical for industry to ensure cost efficiency given that 30% to over 50% of total parcel delivery cost is associated with this leg of the supply chain.<sup>18, 19</sup>

Today, online purchases are typically being shipped from large fulfillment centers located in major industrial markets within proximity to metropolitan areas. In certain cases, the retailers' ability to provide fast shipping options from these fulfillment hubs to other regional centres can be cost prohibitive. As such, occupying distribution space close to the final point of consumption is becoming increasingly important for retailers, as they strive to accommodate service delivery demands from customers. More recently, retailers have begun expanding into regional markets with smaller distribution facilities and a focus on infill – positioning themselves as close to the consumer as possible – in order to compete against other retailers and minimize transportation costs. To overcome these challenges, developers are acquiring properties in ideal urban locations and adaptively redeveloping existing buildings to create a new industrial product type: the urban warehouse. The features of the urban warehouse are as varied as the locations in which they are located, and often depend on the amount of goods being distributed. Unlike traditional fulfillment centers that grow horizontally, urban warehouses grow vertically with either high clear heights or multi-level

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<sup>17</sup> Transportation of the Global Supply Chain. Automated Technology: Driving Change in Real Estate. CBRE. 2016.

<sup>18</sup> Breaking Down the "Last-Mile Delivery": Challenges and Solutions. October 12, 2016.

<sup>19</sup> Parcel Delivery. The Future of the Last Mile. McKinsey&Company. September, 2016.

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configurations that utilize complex automated material handling systems. By emphasizing volume of storage as opposed to area, high land prices can be spread across a greater storage capacity.<sup>20</sup>

- **Reverse Logistics** – As more retailers offer free shipping, free returns and relatively lenient refund standards for their online sales, customers are ordering more products online and returning them with less discretion. The sheer volume of products being returned, coupled with the growing number of ways to return products, is challenging the capacity of existing reverse logistics supply chains – return rates can be as high as 30% to 50%, in some cases. As more retailers expand into the e-commerce market, it is expected that more third-party logistics providers will enter into the market place. This trend is also creating demand for new or expanding, strategically located “quick response” facilities near demand centres, dedicated to handling reverse logistics.<sup>21</sup>

Further to the above, it is noted that a key focus of the Peel Region Goods Movement Strategic Plan 2017-2021 is sustainability. More specifically, this relates to building strong, sustainable, resilient communities by addressing climate change (i.e. reducing greenhouse gas emissions through alternative fuels and fuel efficiency initiatives), increasing education and outreach, as well as integrating land use planning efforts focused on freight and Goods Movement.<sup>22</sup> These strategic objectives directly support efforts in Peel Region and its local municipalities to encourage employment intensification, where appropriate, related to the Goods Movement sector.

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<sup>20</sup> Urban Infill: The New Frontier for E-Commerce. April 2017. Coner Commercial Real Estate.

<sup>21</sup> Growth in Ecommerce Returns Will Drive Facilities Demand. March 15, 2016.

<sup>22</sup> Peel Region Goods Movement Strategic Plan 2017-2021.

## 2. UNDERSTANDING THE GOODS MOVEMENT SECTOR IN PEEL REGION

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### 2.1 Overview

Goods move through and within Peel Region for a variety of reasons, including local deliveries, processing and production (i.e. movement of materials and components to and from manufacturing facilities), and imports and exports (i.e. shipping of commodities and goods). The way these goods are transported in Peel Region has also changed the way in which businesses use the space for warehousing and distribution. As previously discussed, the introduction of automation and technological changes, such as robotics and automation, have altered the built form of traditional industrial buildings related to the Goods Movement sector. Newer distribution and logistic centres are increasingly larger, with higher clear heights and greater floor space to meet scheduling demands from consumers.

Generally, businesses associated with the Goods Movement sector in Peel Region are clustered around the Toronto Pearson International Airport (TPIA) in Mississauga and the CN Intermodal facility in Brampton, directly along one or more 400-series highways or controlled access highways. In Peel Region, approximately half of the Goods Movement businesses and associated employment are located within 1 km of a 400-series highway (Highways 401, 410, 407 and 403) and 72% are within 2 km.

By local municipality, the Goods Movement sector accounts for 27% of employment in the City of Mississauga, 29% in Brampton and 17% in Caledon. More than three-quarters (80%) of Peel's Goods Movement employment, representing 80,900 jobs, is located in Mississauga. This is compared to 18% (17,400 jobs) in Brampton and 2% (2,200 jobs) in Caledon<sup>23</sup> (refer to Appendix A).

The City of Mississauga has a large developed employment land inventory. Most of the City's employment lands are well-established and generally have low building vacancies. Manufacturing and Goods Movement sectors are primarily concentrated in the northern part of the City.

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<sup>23</sup> Based on 2016 Employment Surveys from the City of Mississauga, the City of Brampton, and the Town of Caledon.

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The City of Brampton also has a large employment land supply in Peel Region. Similar to the City of Mississauga, Brampton has several distinct employment areas. Manufacturing and Goods Movement businesses are generally centralized around the CN Intermodal yard. Moving further away from the intermodal yard, a mix of employment clusters are located along the Highway 410 and 407 corridors. The majority of businesses in this area are a mix of smaller manufacturers, with some retailers re-using older industrial space. The newest employment area, located on the west side of Brampton, is the Churchill Business Centre. This area is primarily characterized by large distribution and logistic centres.

Within the Town of Caledon, the majority of existing employment activity associated within the Goods Movement sector is concentrated within the Bolton industrial area. Other designated employment areas in Caledon (i.e. Mayfield West and Tullamore) are also experiencing steady demand related to the Goods Movement sector, due to increasing demand for large logistic and warehousing space within the regional market area.

Collectively, the Goods Movement sector forms an integral part of Peel Region's economic development potential and accommodates a significant share of the Region's businesses and employment. Within Peel Region, approximately 27% (100,400 jobs) of total employment in Peel Region is in the Goods Movement sector (refer to Appendix A).

### 3. EVALUATING GOODS MOVEMENT PRIORITY INTENSIFICATION AREAS

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#### 3.1 Criteria Used for Priority Area Selection

At both the Regional and local levels, location requirements of industry can vary considerably depending on the nature of the employment sector/use.

The Goods Movement sector is dispersed throughout the GTHA (primarily the west side), with the largest concentration in the Region of Peel. In general, Goods Movement industries tend to concentrate when a series of key factors come into alignment, including:

- Access via highway networks;
- Proximity and access to employment areas via arterial roads;
- Links to major trading destinations;
- Competitive land costs;
- Proximity to a major urban centre; and
- Proximity to multi-modal hubs (airports, rail and ports).

Historically, Peel Region has offered all of these attributes. Of particular importance in Peel Region is the presence of the following:

- TPIA;
- CN Intermodal yard in Brampton;
- 400-series highway connections to surrounding Ontario and U.S. employment markets; and
- Market choice of greenfield employment lands.

Figure 3-1 summarizes the broad criteria which have been used to evaluate the Region's established employment areas outlined in Appendix A. The maps in Appendix A illustrate all employment areas in Peel Region, while the shaded areas identify Goods Movement businesses. Based on these criteria, a total of three employment areas were selected as the most suitable locations for Goods Movement intensification in Peel Region. For a complete list of all employment areas in Peel Region, please refer to Appendix B.

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FIGURE 3-1: REGION OF PEEL, CRITERIA FOR PRIORITY AREA SELECTION

| Criteria   | Northeast Employment Area | Gateway Employment Area | Bramalea Employment Area |
|--|---------------------------|-------------------------|--------------------------|
| <p><b>400-series Highway Connection</b><br/>Proximity to multiple 400-series highways is an important attribute to the Goods Movement sector, with respect to highway exposure, access and transportation connectivity.</p>  | ✓                         | ✓                       | ✓                        |
| <p><b>Intermodal Connection</b><br/>Rail freight is a key component of the logistics supply chain and a key component of the regional infrastructure which supports the Goods Movement sector.<br/>As such, proximity to intermodal facilities is a key attribute for many Goods Movement businesses within Peel Region.</p> | ✓                         | ✓                       | ✓                        |
| <p><b>Concentration of Goods Movement Businesses</b><br/>The clustering of Goods Movement businesses allows for synergies and efficiencies in the transportation of goods. The selected employment areas represent the three largest concentrations of Goods Movement employees and businesses in Peel Region.</p>           | ✓                         | ✓                       | ✓                        |



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| Criteria  | Northeast Employment Area | Gateway Employment Area | Bramalea Employment Area |
|---|---------------------------|-------------------------|--------------------------|
| <p><b>Proximity to Airport</b><br/>Airports are recognized as an economic catalyst for the communities they serve. Employment areas located within proximity to the Toronto Pearson International Airport (TPIA) provides a significant concentration of Goods Movement employment, as well as other industrial, office and personal service jobs. Access to TPIA increases not only the flow of goods, but people as well.</p> | ✓                         | ✓                       | ✓                        |
| <p><b>Size of Employment Area</b><br/>The total size of an employment area is vital to ensure a wide selection/ flexibility of development options for increasingly larger Goods Movement operations and future expansion potential of existing facilities.</p>   | ✓                         | ✓                       | ✓                        |

3.2 Local Development Characteristics Influencing Site Selection

To further evaluate employment intensification potential within the Goods Movement Sector in the priority development areas identified in section 3.1, several specific local development characteristics have been assessed.

Development characteristics have been broken down into three major categories, including:

- Employment Land Characteristics:
  - Availability of large (i.e. greater than 5 ha) vacant employment sites; and
  - Presence of existing employment clusters related to Goods Movement.
- Transportation Infrastructure Access/Connectivity:
  - Direct access to 400-series highways;
  - Transit/higher-order transit access;
  - Proximity to TPIA;

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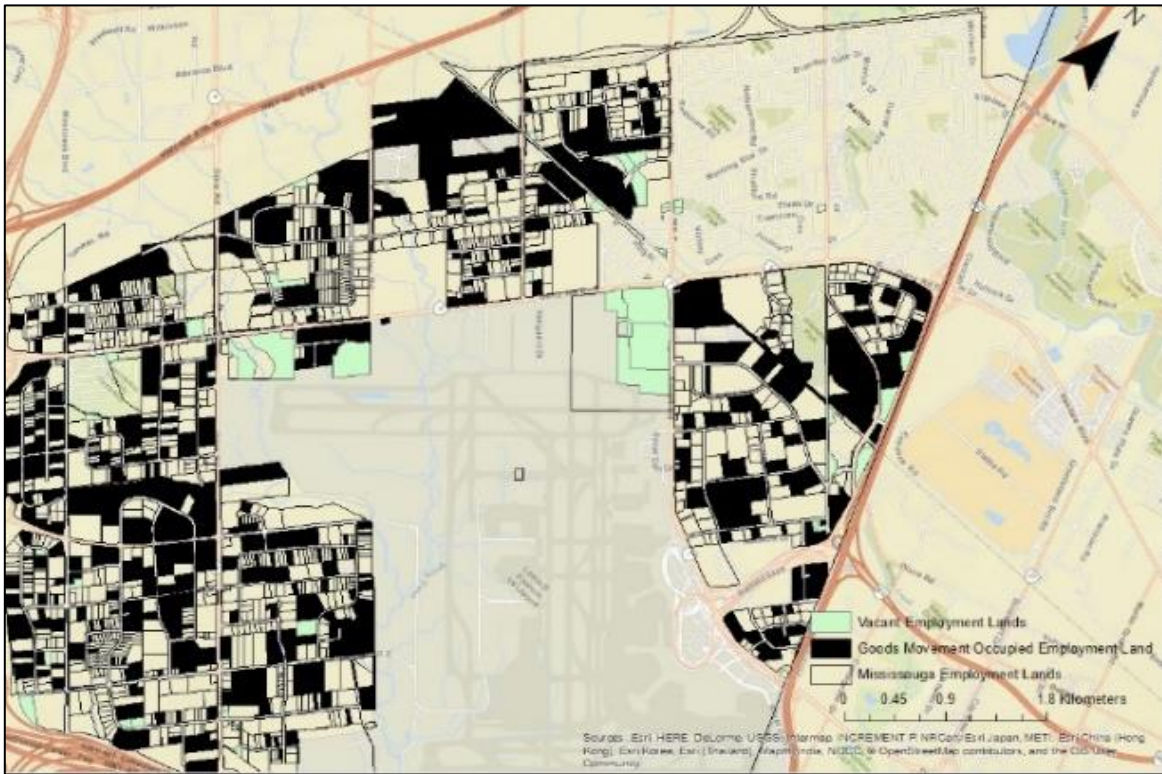
- Access/proximity to intermodal facilities; and
- Access to rail.
- Industrial Buildings Characteristics:
  - Available existing large buildings within the Goods Movement sector constructed within the past 10 years;
  - Available medium to large vacant industrial buildings; and
  - Intensification potential.

3.3 Strengths, Weaknesses, Opportunities, and Challenges Analysis (SWOC)

3.3.1 Northeast Employment Area

Figure 3-2 geographically illustrates the delineation of the Northeast Employment Area. Parcels shaded in black represent lots which are occupied by businesses associated with the Goods Movement sector. Parcels shaded in green depict remaining vacant employment lands.

FIGURE 3-2: NORTHEAST EMPLOYMENT AREA



|                             | Total    | Goods Movement Related |
|-----------------------------|----------|------------------------|
| <b>Number of Businesses</b> | 2,063    | 37%                    |
| <b>Employees</b>            | 69,555   | 42%                    |
| <b>Area</b>                 | 1,739 ha | 44%                    |

Strengths, Weaknesses, Opportunities, and Challenges (SWOC) Analysis:

| Criteria  |   | Comments/Statistics  |
|---|---|--|
| <b>Employment Area Characteristics:</b>   |   |  |
| <ul style="list-style-type: none"> <li>Available vacant employment land (ha)</li> </ul>   | ✓ | 172 ha of vacant employment land available.  |
| <ul style="list-style-type: none"> <li>Availability of medium to large vacant sites (i.e. greater than 5 ha)</li> </ul>         | ✓ | 3 large vacant sites available. Largest vacant site is 45 ha. The second and third largest sites are 11 and 10 ha, respectively. |
| <ul style="list-style-type: none"> <li>Employment area supports a large proportion of the Goods Movement sector</li> </ul>      | ✓ | 42% of total employment within the employment area is related to the Goods Movement sector.                                      |
| <b>Transportation Characteristics:</b>  |   |  |
| <ul style="list-style-type: none"> <li>Direct access to 400-series highways</li> </ul>  | ✓ | Adjacent to four 400-series highways and businesses are no more than 3 km away from a highway interchange.                       |
| <ul style="list-style-type: none"> <li>Access to local public transportation</li> </ul>   | ✓ | Mi Way and TTC.  |
| <ul style="list-style-type: none"> <li>Access to existing higher order transit</li> </ul>                                       | ✓ | Malton GO Station.   |
| <ul style="list-style-type: none"> <li>Proximity to Toronto Pearson International Airport (TPIA)</li> </ul>                     | ✓ | Within a 10-km radius.   |
| <ul style="list-style-type: none"> <li>Direct access to intermodal facilities</li> </ul>  | ✗ | No direct access to intermodal facilities.   |
| <ul style="list-style-type: none"> <li>Proximity to intermodal facilities</li> </ul>  | ✓ | Proximity (within 15 km) to an intermodal yard.  |
| <ul style="list-style-type: none"> <li>Access to rail</li> </ul>  | ✓ | 5 rail spurs in the area.  |
| <b>Building Characteristics:</b>  |   |  |
| <ul style="list-style-type: none"> <li>Large, occupied Goods Movement buildings constructed within the past 10 years</li> </ul> | ✗ | Average size of buildings is 61,800 sq.ft.   |
| <ul style="list-style-type: none"> <li>Available vacant buildings</li> </ul>  | ✗ | < 0.1% building vacancy.   |
| <ul style="list-style-type: none"> <li>Availability of medium to large vacant industrial buildings (100,000 sq.ft.)</li> </ul>  | ✗ | All vacant Goods Movement buildings are smaller than 100,000 sq.ft.  |

| Criteria   |   | Comments/Statistics   |
|--|---|---|
| <ul style="list-style-type: none"> <li>• Intensification potential                             <ul style="list-style-type: none"> <li>○ Expansion opportunities</li> </ul> </li> </ul> | ✘ | Average building coverage for single-tenant Goods Movement parcels is 39%.  |
| <ul style="list-style-type: none"> <li>○ Infill opportunities</li> </ul>   | ✔ | Infill opportunities exist on three large vacant employment sites.  |
| <ul style="list-style-type: none"> <li>○ Redevelopment opportunities</li> </ul>  | ✘ | Limited near-term opportunities for redevelopment of existing buildings. Redevelopment opportunities are uncertain. |

**Strengths and Opportunities**

Bounded by four major 400-series highways, this employment area offers direct access to a highway from most locations within the employment area. In addition to having excellent highway connectivity, this area also is adjacent to TPIA and is approximately 15 km away from the Canadian National (CN) Intermodal. The employment area is also serviced by municipal transit as well as GO train via the Malton GO station. Seven large vacant employment sites in this employment area have been identified as potentially providing opportunities for future Goods Movement development, as shown in Figure 3-2 (green shaded parcels).

Within the Northeast Employment Area, there are three vacant sites that are greater than 5 ha. The largest site, approximately 45 ha, is located on the southwest corner of Derry Road East and Airport Road (shaded green on Figure 3-2). The site remains inactive with respect to development applications. Currently, a small portion of the site facing Airport Road serves as a parking lot, while the west side of the vacant land is adjacent to the Mississauga Cogeneration Plant. Roughly half of this site is owned by the federal government, more specifically Transport Canada, whereas the remaining portion is owned by the City of Mississauga. Currently, there is no Record of Site Condition filed with the Ministry of the Environment and Climate Change for this property. Of the other two remaining large vacant sites, one site remains inactive with no development applications.

**Weaknesses and Challenges**

Being a well-established employment area, many of the buildings in this area were constructed in the 1970s. As a result, many of these buildings may not have the clear height requirements that is typically needed for the Goods Movement sector. In addition to the age of the buildings, the vacancy rate of

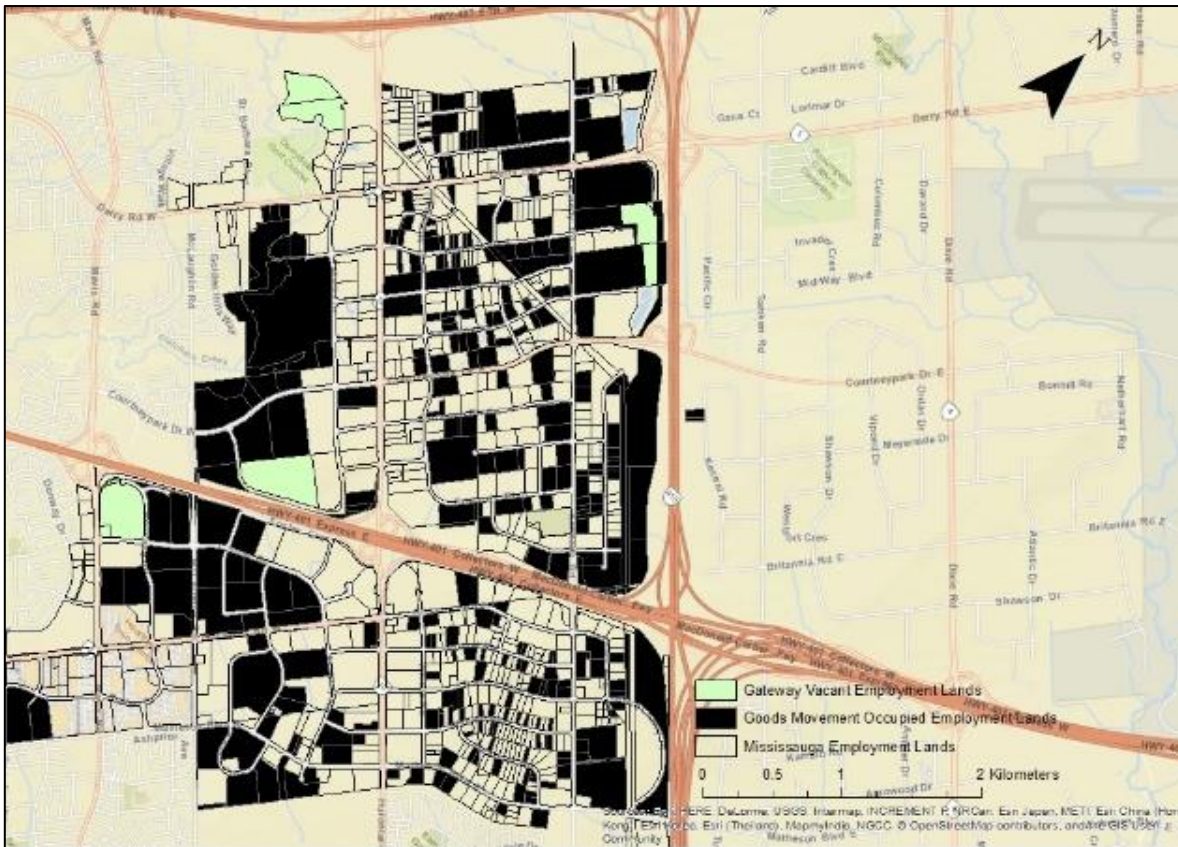
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the employment area is 0.1%, which creates challenges for redevelopment potential. The average building to land coverage ratio of occupied Goods Movement parcels within this employment area is 39%. At this current coverage ratio, there appears to be somewhat limited opportunities for future intensification within the Northeast Employment Area on occupied sites.

**3.3.2 Gateway Employment Area**

Figure 3-3 geographically illustrates the delineation of the Gateway Employment Area. Parcels shaded in black represent lots which are occupied by businesses associated with the Goods Movement sector. Parcels shaded in green depict remaining vacant employment lands.

FIGURE 3-3: GATEWAY EMPLOYMENT AREA



|                             | Total    | Goods Movement Related |
|-----------------------------|----------|------------------------|
| <b>Number of Businesses</b> | 846      | 36%                    |
| <b>Employees</b>            | 43,330   | 35%                    |
| <b>Area</b>                 | 1,211 ha | 32%                    |

Strengths, Weaknesses, Opportunities, and Challenges (SWOC) Analysis:

| Criteria:   |   | Comments/Statistics   |
|---|---|---|
| <b>Employment Area Characteristics:</b>   |   |   |
| <ul style="list-style-type: none"> <li>Available vacant employment land (ha)</li> </ul>   | ✓ | 61 ha of vacant employment land available.  |
| <ul style="list-style-type: none"> <li>Availability of medium to large vacant sites (i.e. greater than 5 ha)</li> </ul>         | ✓ | 4 large vacant sites available. The largest vacant site is 14 ha. The sizes of the remaining vacant sites range between 9 ha and 13 ha. |
| <ul style="list-style-type: none"> <li>Employment area supports a large proportion of the Goods Movement sector</li> </ul>      | ✓ | 35% of the total employment within the employment area is related to the Goods Movement sector.   |
| <b>Transportation Characteristics:</b>  |   |   |
| <ul style="list-style-type: none"> <li>Direct access to 400-series highways</li> </ul>  | ✓ | Adjacent to three 400-series highways and businesses are no more than 3 km away from highway access.                                    |
| <ul style="list-style-type: none"> <li>Access to local public transportation</li> </ul>   | ✓ | Mi Way.   |
| <ul style="list-style-type: none"> <li>Access to existing higher order transit</li> </ul>                                       | ✗ | None.   |
| <ul style="list-style-type: none"> <li>Proximity to Toronto Pearson International Airport (TPIA)</li> </ul>                     | ✓ | Within a 10-km radius.  |
| <ul style="list-style-type: none"> <li>Direct access to intermodal facilities</li> </ul>  | ✗ | No direct access to intermodal facilities.  |
| <ul style="list-style-type: none"> <li>Proximity to intermodal facilities</li> </ul>  | ✓ | Within a 15-km proximity to an intermodal yard.   |
| <ul style="list-style-type: none"> <li>Access to rail</li> </ul>  | ✗ | No rail spurs in the area.  |
| <b>Building Characteristics:</b>  |   |   |
| <ul style="list-style-type: none"> <li>Large, occupied Goods Movement buildings constructed within the past 10 years</li> </ul> | ✓ | Average size of buildings is 110,800 sq.ft.   |
| <ul style="list-style-type: none"> <li>Available vacant buildings</li> </ul>  | ✗ | 1% building vacancy.  |
| <ul style="list-style-type: none"> <li>Availability of medium to large vacant industrial buildings (100,000 sq.ft.)</li> </ul>  | ✗ | Average vacant Goods Movement buildings are smaller than 100,000 sq.ft.   |

| Criteria:  | Comments/Statistics |  |
|--|---------------------|--|
| <ul style="list-style-type: none"> <li>• Intensification potential                             <ul style="list-style-type: none"> <li>○ Expansion opportunities</li> </ul> </li> </ul> | x                   | Average building coverage for single-tenant Goods Movement parcels is 41%.   |
| <ul style="list-style-type: none"> <li>○ Infill opportunities</li> </ul>   | ✓                   | Infill opportunities exist on three of the four large vacant employment sites.   |
| <ul style="list-style-type: none"> <li>○ Redevelopment opportunities</li> </ul>  | ✓                   | Opportunities may exist for redevelopment. Existing occupied buildings constructed over the past ten years are over 100,000 sq.ft., however redevelopment opportunities are uncertain. |

**Strengths and Opportunities**

Similar to the Northeast Employment Area, the Gateway Employment Area has excellent access to highways. This area is bounded by three 400-series highways. In addition, businesses in this area are located within a 10-km radius from the TPIA and a 15-km radius from the CN Intermodal.

In total, the employment area offers four large vacant parcels with an average size of 12 ha. In addition to offering large vacant employment lands, buildings in this area are fairly new (built within the early 2000s). As such, many occupied industrial buildings in this area are large enough to accommodate a wide range of Goods Movement operations. It is noted that of the four vacant sites identified, a development application has been filed for three.

**Weaknesses and Challenges**

One of the challenges of this employment area is the lack of direct access rail. While the employment area is within proximity (approximately 15 km) to the CN Intermodal, there is no access to rail spurs within this area. Similar to the Northeast Employment Area, due to high demand, the industrial vacancy rate within this area is extremely low. While there are vacant industrial buildings currently available, most are not large enough to accommodate the distribution and warehousing sector. The average building to land coverage ratio of occupied Goods Movement parcels within this employment area is 41%. At this coverage ratio, opportunities for future intensification within the Gateway Employment Area on occupied sites may be limited. In addition, the remaining inactive large vacant employment site is noted to have an irregular

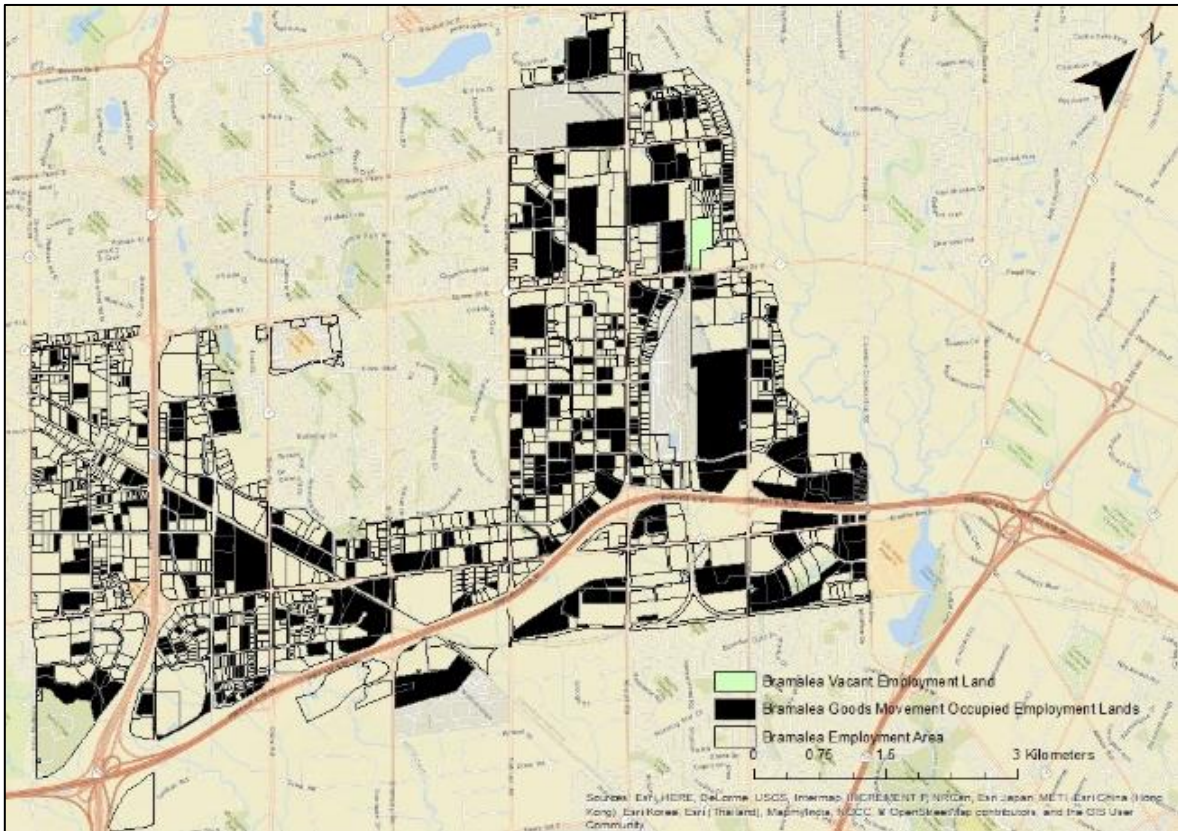
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configuration and potential accessibility constraints, which may pose challenges to development.

**3.3.3 Bramalea Employment Area<sup>24</sup>**

Figure 3-4 illustrates the geographic delineation of the Bramalea Employment Area. Parcels shaded in black represent lots which are occupied by businesses associated with the Goods Movement sector. Parcels shaded in green depict remaining vacant employment lands.

**FIGURE 3-4: BRAMALEA EMPLOYMENT AREA**



|                             | Total    | Goods Movement Related |
|-----------------------------|----------|------------------------|
| <b>Number of Businesses</b> | 1,254    | 21%                    |
| <b>Employees</b>            | 56,360   | 30%                    |
| <b>Area</b>                 | 4,935 ha | 41%                    |

<sup>24</sup> Refers to 410 @ Steeles Business Park, 410 Industrial Corridor, Airport 407 Business Campus, Airport Road Industrial Park, Bramalea Business Park I, Bramalea Business Park II, Gates of Brampton Business Park, Gorewood Business Park, Midair Court Industrial Park, Orenda & East Drive and Orion Gate Business Park.



Strengths, Weaknesses, Opportunities, and Challenges (SWOC) Analysis:

| Criteria   |   | Comments/Statistics  |
|--|---|--|
| <b>Employment Area Characteristics:</b>  |   |  |
| <ul style="list-style-type: none"> <li>Available vacant employment land (ha)</li> </ul>  | x | Minimal vacant employment land available.  |
| <ul style="list-style-type: none"> <li>Availability of medium to large vacant sites (i.e. greater than 5 ha)</li> </ul>  | x | 1 large vacant site available. The vacant parcel is 11 ha.   |
| <ul style="list-style-type: none"> <li>Employment area supports a large proportion of the Goods Movement sector</li> </ul>   | ✓ | 31% of the total employment within the employment area is related to the Goods Movement sector.    |
| <b>Transportation Characteristics:</b>   |   |  |
| <ul style="list-style-type: none"> <li>Direct access to 400-series highways</li> </ul>   | ✓ | Adjacent to two 400-series highways and businesses are no more than 5 km away from highway access. |
| <ul style="list-style-type: none"> <li>Access to local public transportation</li> </ul>  | ✓ | ZUM, Brampton Transit.   |
| <ul style="list-style-type: none"> <li>Access to existing higher order transit</li> </ul>  | ✓ | Bramalea GO Station.   |
| <ul style="list-style-type: none"> <li>Proximity to Toronto Pearson International Airport (TPIA)</li> </ul>  | ✓ | Within a 15-km radius.   |
| <ul style="list-style-type: none"> <li>Direct access to intermodal facilities</li> </ul>   | ✓ | Direct access to intermodal facilities.  |
| <ul style="list-style-type: none"> <li>Proximity to intermodal facilities</li> </ul>   | ✓ | Within a 10-km proximity to an intermodal yard.  |
| <ul style="list-style-type: none"> <li>Access to rail</li> </ul>   | ✓ | 6 rail spurs in the area.  |
| <b>Building Characteristics:</b>   |   |  |
| <ul style="list-style-type: none"> <li>Large, occupied Goods Movement buildings constructed within the past 10 years</li> </ul>  | ✓ | Average size of buildings is 521,400 sq.ft.  |
| <ul style="list-style-type: none"> <li>Available vacant buildings</li> </ul>   | x | Less than 1% building vacancy.   |
| <ul style="list-style-type: none"> <li>Availability of medium to large vacant industrial buildings (100,000 sq.ft.)</li> </ul>   | x | Available vacant Goods Movement buildings average 27,000 sq.ft.                                    |
| <ul style="list-style-type: none"> <li>Intensification potential                             <ul style="list-style-type: none"> <li>Expansion opportunities</li> </ul> </li> </ul> | ✓ | Average building coverage for single-tenant parcels is 33%.  |

| Criteria  | Comments/Statistics |  |
|---|---------------------|--|
| <ul style="list-style-type: none"> <li>○ Infill opportunities</li> </ul>        | <p>×</p>            | <p>Limited opportunities for infill. Limited vacant lands available to accommodate the Goods Movement sector.</p>          |
| <ul style="list-style-type: none"> <li>○ Redevelopment opportunities</li> </ul> | <p>×</p>            | <p>Limited near-term opportunities for redevelopment of existing buildings. Redevelopment opportunities are uncertain.</p> |

**Strengths and Opportunities:**

The Bramalea Employment Area is one of the largest employment areas in Peel Region. One of the key strengths of this area is its direct access to the CN Intermodal. The largest cluster of Goods Movement businesses is concentrated around the intermodal area. Businesses that are located on the western side of the Bramalea Employment Area do not have direct access to the intermodal, but are still located within a 10-km radius from the site. Businesses in the Bramalea Employment Area are also located within a 15-km radius from the TPIA. This employment area also offers transit access via Brampton public transit as well as GO train service, which is served by a transit station situated in the heart of the Bramalea Employment Area. Transportation access is a key strength of this area, with respect to both the movement of people and goods. Another strength of this area is that the majority of the buildings are between 20 and 30 years old, and the average size of the Goods Movement buildings in this area are large (just over 500,000 sq.ft. on average).

In contrast to the other priority employment areas reviewed, the average building to land coverage ratio of occupied Goods Movement parcels within this employment area is relatively low at 33% on average. At this coverage ratio, there appears to be opportunities for future intensification within the Gateway Employment Area on occupied lands.

**Weaknesses and Challenges:**

A key weakness of this employment area for redevelopment is the lack of available vacant land that is readily available for development. As identified, only one vacant parcel is available. This site is situated on the northwest corner of Queen Street East and Sun Pac Boulevard and is approximately 11 ha in size. The property is currently being used as a surface parking lot and is adjacent to the intermodal yard. Currently, there is a development application to construct a motor vehicle washing establishment at the northwest corner of

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Queen Street East and Sun Pac Boulevard. While this site is technically vacant, it is currently not on the market for sale or lease.

## 4. CONCLUSIONS

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The Goods Movement sector forms an integral part of the Region of Peel's economic development and employment growth potential. Peel comprises a high concentration of Goods-Movement-related industries which contribute significantly to the local, provincial and national economies. Freight transportation, warehousing and manufacturing account for approximately one-fifth of Peel's employment base and a significant share of industrial development activity over the past decade has been in the Goods Movement sector. Peel Region accommodates over 2,000 trucking companies, which represents 25% of all truck activity in Ontario and accounts for approximately \$1.8 billion worth of Goods Movement through Peel every day. As Goods Movement is the largest industrial employment growth sector within the G.T.H.A., the Region of Peel must ensure the efficient movement of goods through and within the Region to attract industry and investments.

The outlook for the Goods Movement sector in Peel Region remains strong. It is anticipated that the Goods Movement sector will continue to be a significant driver of employment growth in Peel and more specifically the Region's employment areas. While there is demand for this sector in Peel, the current supply of vacant designated employment lands is diminishing. As such, opportunities to accommodate this industry within established employment lands is limited.

While employment intensification is a challenging topic to assess and quantify, this study provides a first step in understanding how anticipated trends in the Goods Movement industry may impact the future of the industrial real estate market. Provided with the description of existing conditions within Peel's established employment areas, the Region is able to more clearly assess what the future opportunities and challenges are regarding employment intensification related to the Goods Movement sector.

The following conclusions are drawn from this analysis:

1. The vast majority of the Region's employment lands are located in direct proximity to one or more 400-series highways or controlled access highways in Peel. The Region's largest established employment areas are concentrated around the TPIA in Mississauga and the CN Intermodal yard in Brampton (see Appendix A).
2. Peel Region's employment areas accommodate approximately 100,400 employees related to the Goods Movement sector. This represents the

largest concentration of employment related to the Goods Movement sector in the Greater Toronto Hamilton Area (GTHA).<sup>25</sup>

3. Through a Region-wide evaluation, the Northeast Employment Area and the Gateway Employment Area in Mississauga, and the Bramalea Employment Area in Brampton were identified as priority areas for employment intensification related to the Goods Movement sector. Collectively, these employment areas comprise over 60% of existing jobs on employment lands in Peel related to the Goods Movement sector.
4. Over the long term (i.e. years 2031 and 2041), employment intensification within the three consolidated employment areas identified above is anticipated through redevelopment, expansions, infill and re-occupation of vacant industrial buildings.
5. Our analysis indicates that some infill opportunities may exist on large vacant sites (i.e. greater than 5 ha). In total, eight vacant sites were identified within the priority employment areas that are five hectares or greater in land area. While some of these sites may pose development challenges due to configuration and access issues, most sites identified appear to offer opportunities for development related to the Goods Movement sector. It is noted that development applications have been filed for several of the large vacant sites reviewed.
6. Redevelopment potential with the priority employment areas is hard to gauge, given uncertainty with respect to future expansions and redevelopment plans of existing and/or prospective industries. Of the priority sites reviewed, the Gateway Employment Area offers the greatest potential to accommodate Goods Movement businesses within existing facilities given the size and age of the existing building stock.
7. Expansion potential is also difficult to gauge given the uncertainty associated with expansion plans of existing businesses. It has been identified that the Bramalea Employment Area currently has a relatively low average building coverage for single-tenant Goods Movement parcels of approximately 33%, which may support future expansion on developed sites.
8. Industrial vacancy rates are currently very low in Peel's employment areas. For the priority employment areas identified herein, average industrial vacancy rates are 1% or less. It is noted that the industry trends identified in section 1 suggest that long-term technological factors, such as autonomous vehicles, may generate further demand for warehouse consolidation – a trend which is already observed in today's real estate market. This may generate future intensification opportunities and challenges in Peel's established employment areas as existing facilities are consolidated.

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<sup>25</sup> Accounting for all off-site employment; this figure is expected to increase.

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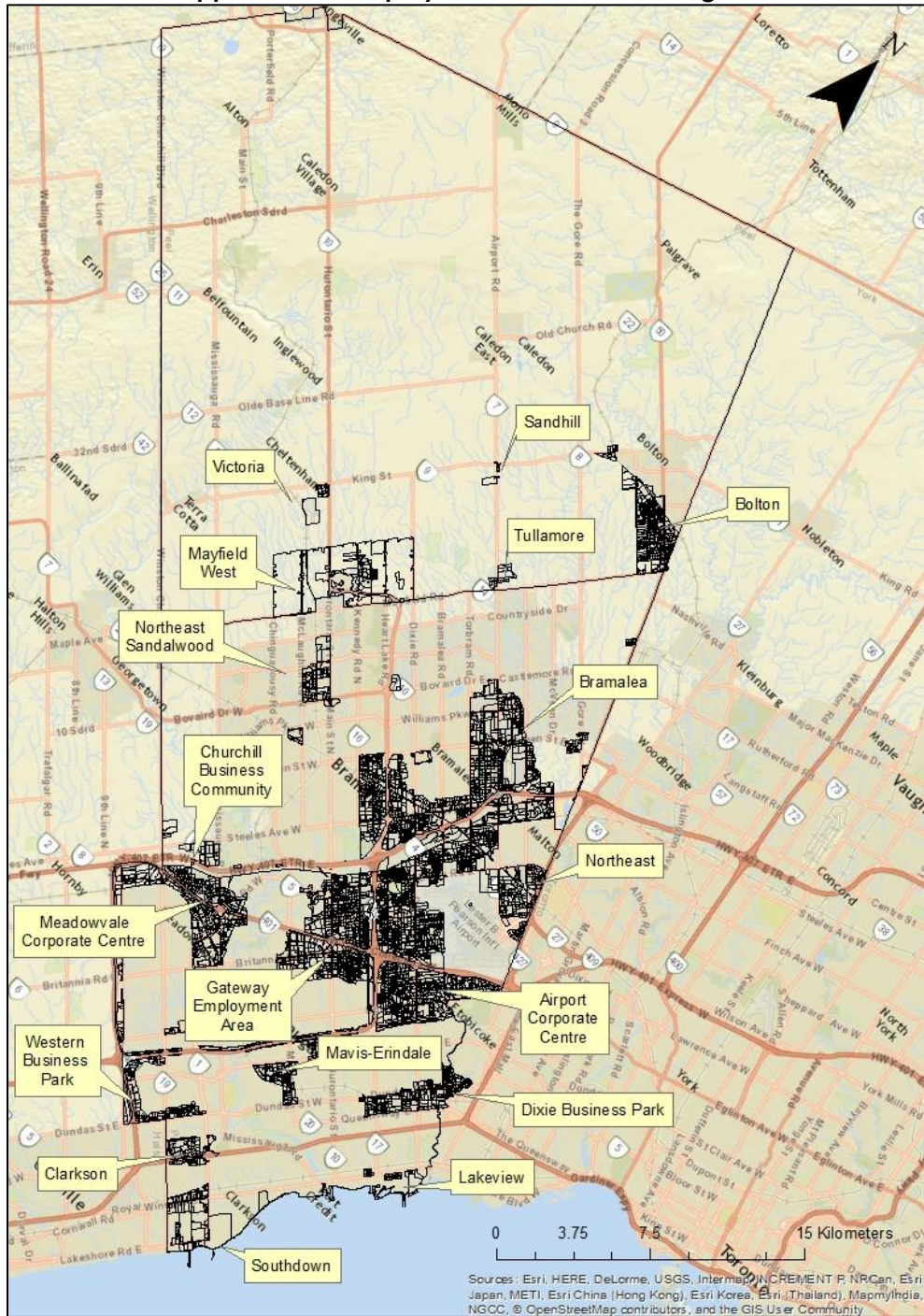
9. Our review of density trends within occupied industrial buildings within the past several years suggests that employment intensification in the industrial sector is likely to be minimal over the next decade and beyond. This suggests that additional employees are not likely to be added to existing Goods Movement businesses in the near to longer term.

# **APPENDIX A**

**Employment Areas in  
Peel Region that  
Accommodate the  
Goods Movement  
Sector**

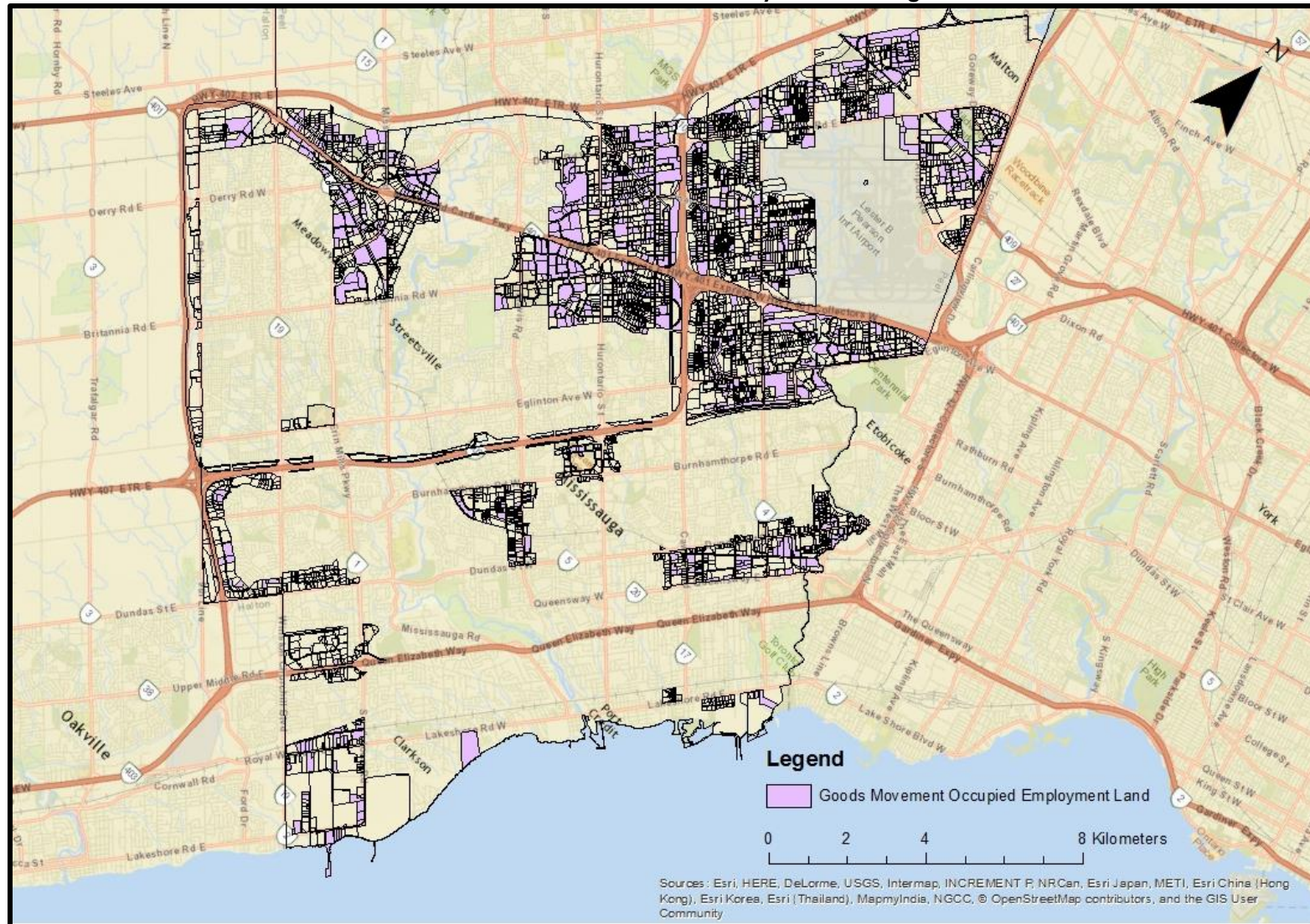
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Appendix A – Employment Areas in Peel Region



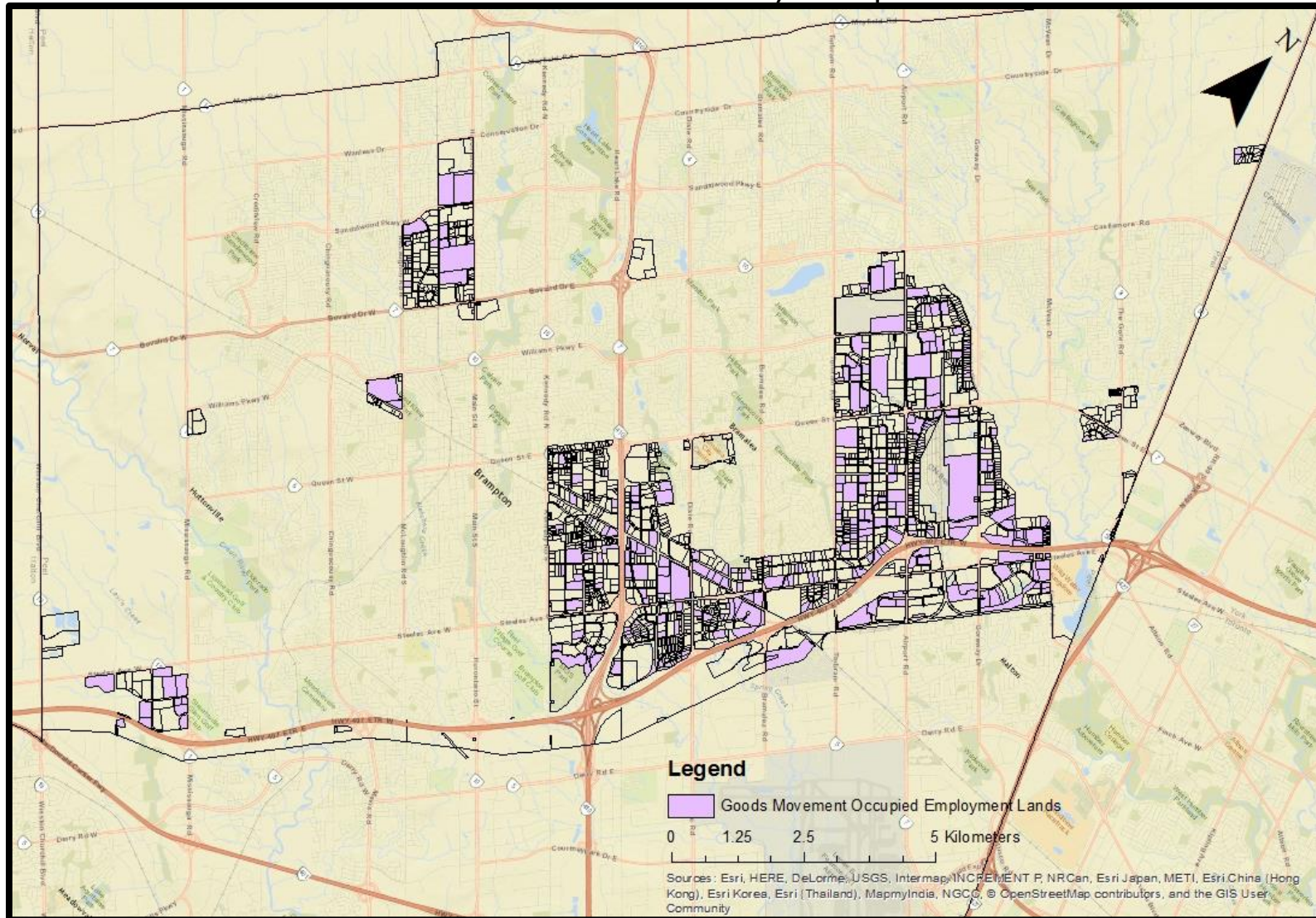


Appendix A – Employment Areas in Peel Region  
Goods Movement Sector in the City of Mississauga

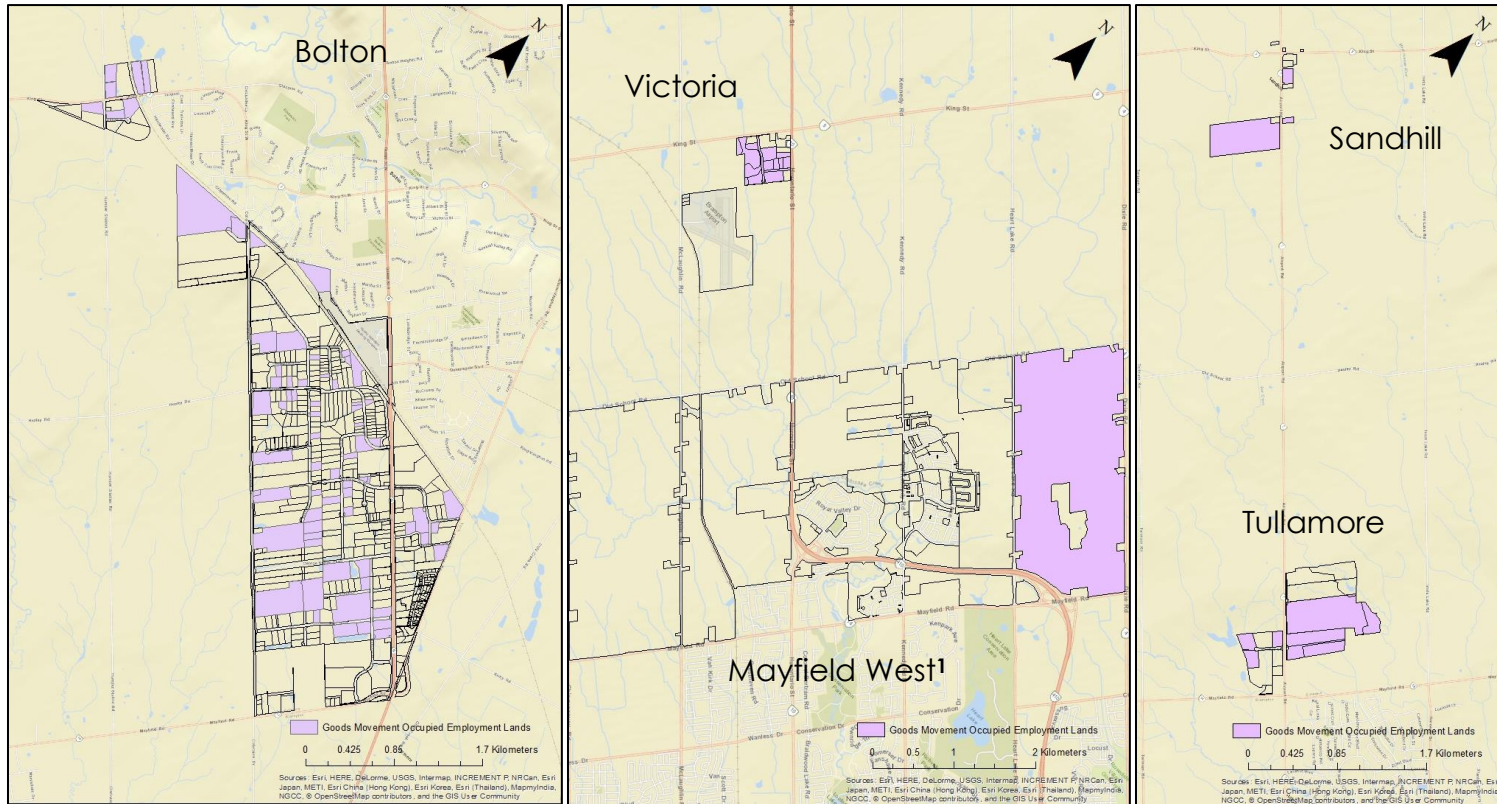


Sources: Esri, HERE, DeLorme, USGS, Intermap, INCREMENT P, NRCan, Esri Japan, METI, Esri China (Hong Kong), Esri Korea, Esri (Thailand), MapmyIndia, NGCC, © OpenStreetMap contributors, and the GIS User Community

Appendix A – Employment Areas in Peel Region  
Goods Movement Sector in the City of Brampton



**Appendix A – Employment Areas in Peel Region  
Goods Movement Sector in the Town of Caledon**



<sup>1</sup> Goods Movement occupied employment lands, as shown in Appendix A, depict a larger land area than shown on Schedule B of the Town of Caledon Official Plan.

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## Appendix A – Employment Areas in Peel Region

| Employment Area              | Total Gross Land Area (ha) | Total Gross Land Area occupied by Goods Movement (ha) | % of Land Area occupied by Goods Movement | Total Gross Floor Area (sq. ft.) | Goods Movement Gross Floor Area (GFA) (sq. ft.) | % of Goods Movement Gross Floor Area | Total Employees | Goods Movement Employees | % of Goods Movement Employees |
|------------------------------|----------------------------|---|---|----------------------------------|---|--------------------------------------|-----------------|--------------------------|-------------------------------|
| Airport Corporate Centre     | 740                        | 230   | 31%                                       | 25,869,903                       | 9,212,109                                       | 36%                                  | 70,300          | 19,795                   | 28%                           |
| Clarkson                     | 159                        | 37  | 23%                                       | 3,513,907                        | 546,021   | 16%                                  | 13,245          | 5                        | 0%                            |
| Dixie Business Park          | 404                        | 125   | 31%                                       | 14,531,051                       | 2,313,816                                       | 16%                                  | 9,820           | 1,415                    | 14%                           |
| Gateway Employment Area      | 1,211                      | 384   | 32%                                       | 44,329,568                       | 24,252,369                                      | 55%                                  | 43,330          | 15,230                   | 35%                           |
| Lakeview                     | 75                         | 16  | 22%                                       | 1,779,909                        | 242,502   | 14%                                  | 5,405           | 410                      | 8%                            |
| Mavis-Erindale               | 189                        | 46  | 25%                                       | 5,498,353                        | 944,250   | 17%                                  | 14,085          | 2,800                    | 20%                           |
| Meadowvale Corporate Centre  | 783                        | 252   | 32%                                       | 23,804,030                       | 9,954,370                                       | 42%                                  | 44,385          | 7,800                    | 18%                           |
| Northeast                    | 1,739                      | 773   | 44%                                       | 69,432,407                       | 28,552,138                                      | 41%                                  | 69,555          | 29,190                   | 42%                           |
| Southdown                    | 491                        | 187   | 38%                                       | 9,047,917                        | 1,156,825                                       | 13%                                  | 19,220          | 3,715                    | 19%                           |
| Western Business Park        | 267                        | 71  | 27%                                       | 8,138,200                        | 1,656,935                                       | 20%                                  | 7,265           | 505                      | 7%                            |
| <b>Mississauga Total</b>     | <b>6,058</b>               | <b>2,122</b>  | <b>35%</b>                                | <b>205,945,244</b>               | <b>78,831,335</b>                               | <b>38%</b>                           | <b>296,610</b>  | <b>80,865</b>            | <b>27%</b>                    |
| Bramalea                     | 4,935                      | 2,028   | 41%                                       | 66,000,060                       | 20,592,076                                      | 31%                                  | 56,360          | 16,685                   | 30%                           |
| Churchill Business Community | 510                        | 394   | 77%                                       | 95,523,933                       | 30,699,220                                      | 32%                                  | 3,780           | 600                      | 16%                           |
| Northeast Sandalwood         | 540                        | 243   | 45%                                       | 6,915,189                        | 2,738,393                                       | 40%                                  | 455             | 60                       | 13%                           |
| <b>Brampton Total</b>        | <b>5,986</b>               | <b>2,665</b>  | <b>45%</b>                                | <b>168,439,182</b>               | <b>54,029,689</b>                               | <b>32%</b>                           | <b>60,595</b>   | <b>17,345</b>            | <b>29%</b>                    |
| Bolton                       | 803                        | 379   | 47%                                       | 11,536,686                       | 3,146,463                                       | 27%                                  | 10,895          | 1,165                    | 11%                           |
| Mayfield West                | 1,694                      | 363   | 21%                                       | 685,203                          | 508,442   | 74%                                  | 428             | 150                      | 35%                           |
| Sandhill                     | 25                         | 22  | 89%                                       | 56,235                           | 6,007   | 11%                                  | 73              | 30                       | 41%                           |
| Tullamore                    | 78                         | 15  | 19%                                       | 1,788,230                        | 1,212,477                                       | 68%                                  | 190             | 120                      | 63%                           |
| Victoria                     | 224                        | 102   | 46%                                       | 362,885                          | 17,746  | 5%                                   | 775             | 685                      | 88%                           |
| <b>Caledon Total</b>         | <b>2,823</b>               | <b>881</b>  | <b>31%</b>                                | <b>14,429,240</b>                | <b>4,891,135</b>                                | <b>34%</b>                           | <b>12,361</b>   | <b>2,150</b>             | <b>17%</b>                    |
| <b>Peel Region Total</b>     | <b>14,866</b>              | <b>5,668</b>  | <b>38%</b>                                | <b>388,813,665</b>               | <b>137,752,159</b>                              | <b>35%</b>                           | <b>369,566</b>  | <b>100,360</b>           | <b>27%</b>                    |

Note: Numbers may not add up due to rounding

# **APPENDIX B**

## **Criteria for Priority Area Selection**

Appendix B – Criteria for Priority Area Selection

| Criteria   | City of Mississauga       |                         |                          |                     |          |                |          |           |                       |                             | City of Brampton         |                           |                      | Town of Caledon |          |           |          |        |
|--|---------------------------|-------------------------|--------------------------|---------------------|----------|----------------|----------|-----------|-----------------------|-----------------------------|--------------------------|---------------------------|----------------------|-----------------|----------|-----------|----------|--------|
|  | Northeast Employment Area | Gateway Employment Area | Airport Corporate Centre | Dixie Business Park | Lakeview | Mavis Erindale | Clarkson | Southdown | Western Business Park | Meadowdale Corporate Centre | Bramalea Employment Area | Churchill Business Centre | Northwest Sandalwood | Mayfield West   | Sandhill | Tullamore | Victoria | Bolton |
| <p><b>400-series Highway Connection</b><br/>Proximity to multiple 400-series highways is an important attribute to the Goods Movement sector, with respect to highway exposure, access and transportation connectivity.</p>  | ✓                         | ✓                       | ✓                        | ✓                   | ✓        | ✓              | ✓        | ✓         | ✓                     | ✓                           | ✓                        | ✓                         | ✓                    | ✓               | ✗        | ✗         | ✓        | ✓      |
| <p><b>Intermodal Connection</b><br/>Rail freight is a key component of the logistics supply chain and a key component of the regional infrastructure which supports the Goods Movement sector.<br/>As such, proximity to intermodal facilities is a key attribute for many Goods Movement businesses within Peel Region.</p> | ✓                         | ✓                       | ✓                        | ✗                   | ✗        | ✗              | ✗        | ✗         | ✗                     | ✗                           | ✓                        | ✗                         | ✗                    | ✗               | ✗        | ✗         | ✗        | ✓      |
| <p><b>Concentration of Goods Movement Businesses</b><br/>The clustering of Goods Movement businesses allows for synergies and efficiencies in the transportation of goods. The selected employment areas represent the three largest concentrations of Goods Movement employees and businesses in Peel Region.</p>           | ✓                         | ✓                       | ✓                        | ✗                   | ✗        | ✗              | ✗        | ✗         | ✗                     | ✗                           | ✓                        | ✗                         | ✗                    | ✗               | ✗        | ✗         | ✗        | ✗      |

PEEL GOODS MOVEMENT – REGION OF PEEL

| Criteria  | City of Mississauga       |                         |                          |                     |          |                |          |           |                       |                             | City of Brampton         |                           |                      | Town of Caledon |          |           |          |        |
|---|---------------------------|-------------------------|--------------------------|---------------------|----------|----------------|----------|-----------|-----------------------|-----------------------------|--------------------------|---------------------------|----------------------|-----------------|----------|-----------|----------|--------|
|   | Northeast Employment Area | Gateway Employment Area | Airport Corporate Centre | Dixie Business Park | Lakeview | Mavis Erindale | Clarkson | Southdown | Western Business Park | Meadowdale Corporate Centre | Bramalea Employment Area | Churchill Business Centre | Northwest Sandalwood | Mayfield West   | Sandhill | Tullamore | Victoria | Bolton |
| <p><b>Proximity to Airport</b><br/>Airports are recognized as an economic catalyst for the communities they serve. Employment areas located within proximity to the Toronto Pearson International Airport (T.P.I.A.) provide a significant concentration of Goods Movement employment as well as other industrial, office and personal service jobs. Access to the T.P.I.A. increases not only the flow of goods, but people as well.</p> | ✓                         | ✓                       | ✓                        | ✓                   | ✓        | ✓              | ✓        | ✓         | ✓                     | ✓                           | ✓                        | ✓                         | ✓                    | ✓               | ✓        | ✓         | ✓        | ✓      |
| <p><b>Size of Employment Area</b><br/>The total size of an employment area is vital to ensure a wide selection/flexibility of development options for increasingly larger Goods Movement operations and the future expansion potential of existing facilities.</p>  | ✓                         | ✓                       | ✗                        | ✗                   | ✗        | ✗              | ✗        | ✗         | ✗                     | ✓                           | ✓                        | ✓                         | ✗                    | ✗               | ✗        | ✗         | ✗        | ✗      |