

2009 GROWTH TRENDS REVIEW



PLANNING SERVICES DEPARTMENT

Clarington
Leading the Way

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1.0 INTRODUCTION

1.1 PURPOSE OF THE GROWTH TRENDS REVIEW

The Planning Services Department conducts on-going monitoring activities to assess the effectiveness of the Municipality of Clarington Official Plan, as well as other municipal and Durham Regional policies. These monitoring activities also assist in identifying emerging issues and trends within the Municipality of Clarington. Building permit activity and other related data are often used as indicators of housing and employment activity within Clarington, the level of local investment, and economic performance.

1.2 INFORMATION SOURCES

The data collected and analyzed in this report is based on building permit information and housing market information gathered from a variety of sources. These sources include:

- Municipality of Clarington's own source data;
- Durham Region;
- Statistics Canada;
- Canada Mortgage and Housing Corporation;
- Royal Bank of Canada Economics Research; and
- The Bank of Canada.

1.3 PUBLISHING OF BUILDING PERMIT ACTIVITY REVIEW

The Planning Services Department publishes the Growth Trends Review on an annual basis. Copies of the document are available from the Planning Services Department directly or alternatively can be accessed online at www.clarington.net.

1.4 CONTACT INFORMATION

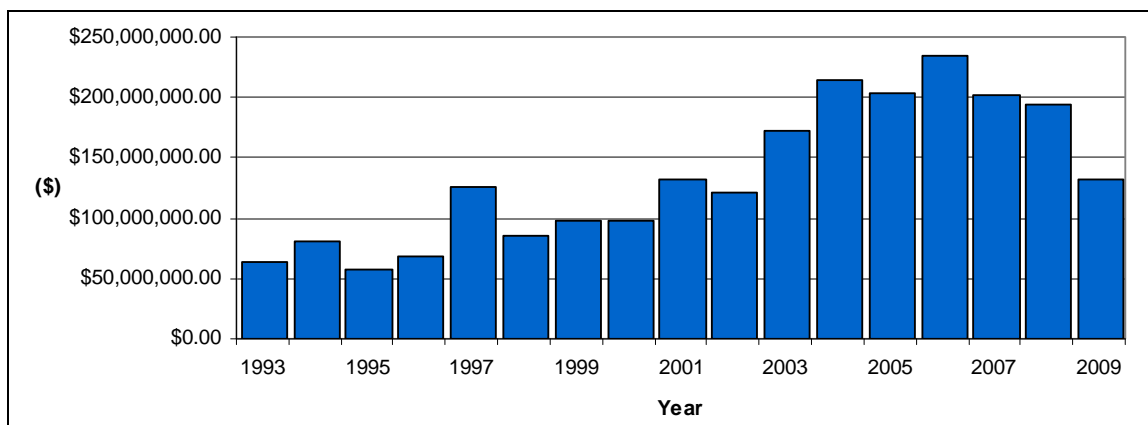
Should you have any questions, comments, and/or suggestions concerning the Growth Trends Review, please contact the Planning Services Department by telephone at 905-623-3379 or by email at planning@clarington.net.

2.0 OVERALL GROWTH TRENDS

2.1 TOTAL BUILDING PERMIT VALUE IN CLARINGTON

The total value of all building permits issued in Clarington decreased by 31.7% from \$193.40 million in 2008 to \$132.17 million in 2009¹. The total value of building permits issued in 2009 was similar to the values realized in the early 2000's (Figure 1). Since 1993², the total value of building permits issued in Clarington has averaged approximately \$134.14 million per year. The results of 2009 lowered the average by approximately \$130,000, which can be attributed to the unfavourable economic conditions of this past year.

Figure 1: Total Building Permit Value in Clarington, 1993-2009



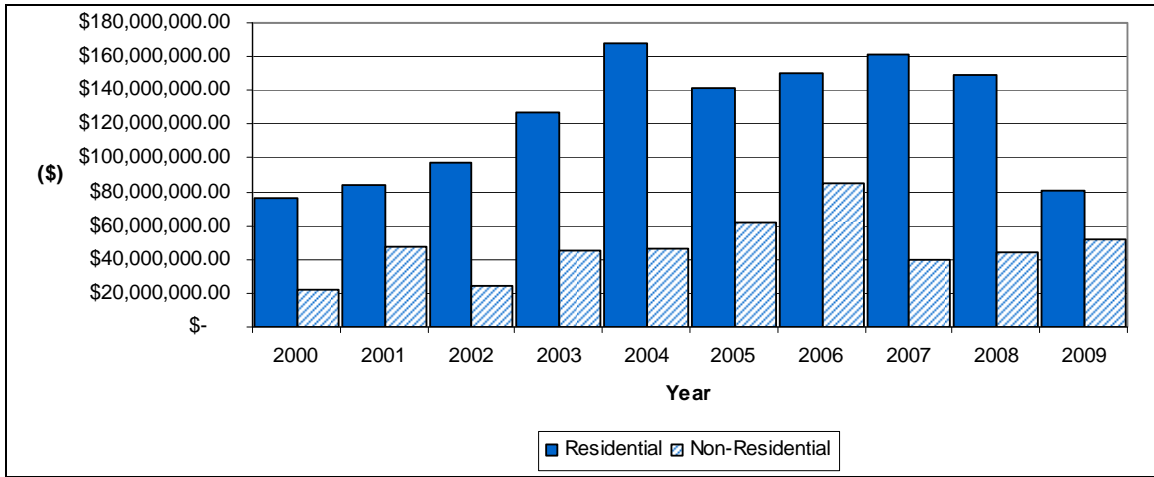
As Figure 2 (next page) illustrates, the decrease in total building permit value for Clarington can be attributed to a sharp decline in the residential building permit value. The non-residential building permit value increased 16% from \$44.45 million in 2008 to \$51.57 million in 2009 whereas the residential building permit value decreased by about 45.9% from \$148.95 million in 2008 to \$80.59 million in 2009³. Residential building permit values have risen significantly over the past ten years. Due to poor economic conditions globally, Clarington saw building permit values decline to a level similar to 2000. Gains made over the last several years in residential building permit activity were lost in 2009 as the residential building permit value weakened significantly. Both the number of permits and the value of permits were well below the average of the last decade. While non-residential building permits edged slightly higher in 2009, the increase in value did not compensate for the reduction in residential building permit value for the year.

¹ Municipality of Clarington, Engineering Services Department, January 2010.

² Municipality of Clarington, Engineering Services Department, January 2010.

³ Durham Region Planning Department, Annual Building Permit Activity Review, March 2010.

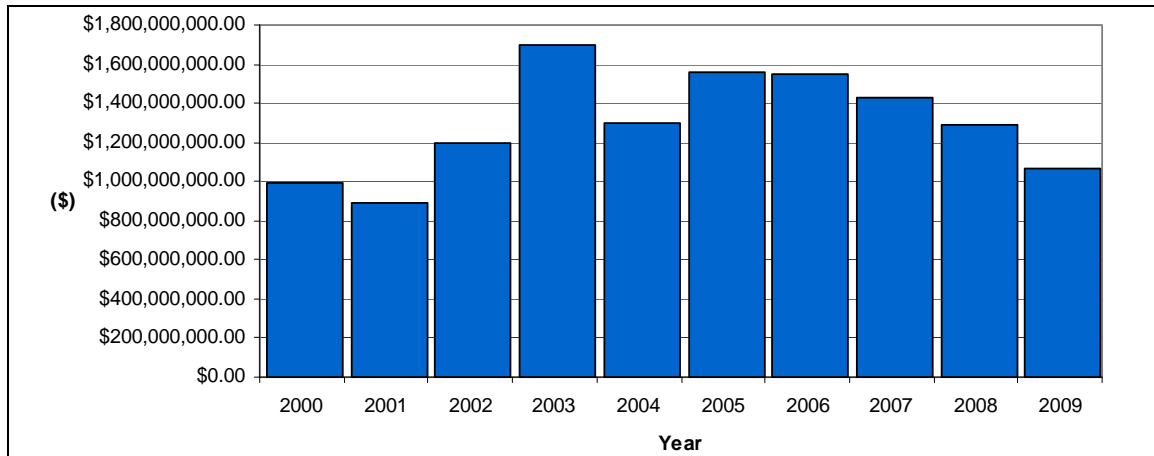
Figure 2: Total Building Permit Value by Residential/Non-Residential Sector in Clarington, 2000-2009



2.2 TOTAL BUILDING PERMIT VALUE IN DURHAM REGION

Durham Region experienced a decrease of 17.7% in total building permit value from \$1.29 billion in 2008 to \$1.06 billion in 2009⁴. Total building permit value has edged lower four years running in Durham Region (Figure 3). Since 2000, the total value of building permits issued in Durham Region has averaged about \$1.3 billion. 2009 was a below average year as a result of lower building permit activity than that of the past several years. The past year was only the second time since 2002 that the total building permit value for Durham Region fell below \$1.3 billion.

Figure 3: Total Building Permit Value in Durham Region, 2000-2009



⁴ Durham Region Planning Department, Annual Building Permit Activity Review, March 2010.

Clarington and Durham Region experienced a decline in total building permit value in 2009. The residential building permit value decreased and the non-residential building permit value rose⁵ in Clarington, while both the residential and non-residential values decreased for Durham Region as a whole. For the fourth year in a row, Durham Region saw a reduction in the value of residential building permits⁶. Non-residential building permit values had been increasing steadily in Durham Region since 2005; however a decline in value of about \$100 million was experienced in 2009.

2.3 SHARE OF TOTAL BUILDING PERMIT VALUE IN DURHAM REGION

In 2009, Clarington's share of total building permit value in Durham Region decreased by 2.54% from 14.96% in 2008 to 12.42% in 2009 (Table 1). The change observed in the past year is typical when compared to the previous years.

Table 1: Share of Total Building Permit Value in Durham Region, 2000-2009

Year	Total Value (Durham)	Total Value (Clarington)	Share of Durham (by Clarington)	% Change (from previous year)
2000	\$997,400,000.00	\$97,760,960.34	9.80%	-
2001	\$889,700,000.00	\$131,319,432.00	14.76%	4.96%
2002	\$1,200,000,000.00	\$120,764,948.00	10.06%	-4.70%
2003	\$1,700,000,000.00	\$172,409,655.00	10.14%	0.08%
2004	\$1,300,000,000.00	\$213,848,329.00	16.45%	6.31%
2005	\$1,560,000,000.00	\$203,220,114.00	13.03%	-3.42%
2006	\$1,548,000,000.00	\$235,245,253.00	15.20%	2.17%
2007	\$1,425,000,000.00	\$201,648,127.00	14.15%	-1.05%
2008	\$1,293,100,000.00	\$193,402,725.00	14.96%	0.81%
2009	\$1,064,200,000.00	\$132,165,301.00	12.42%	-2.54%

⁵ Municipality of Clarington, Engineering Services Department, January 2010.

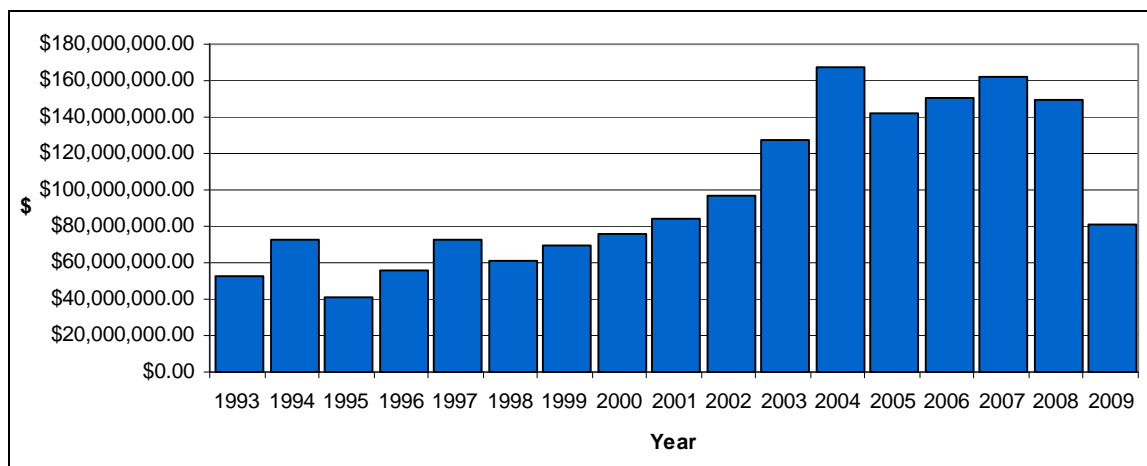
⁶ Durham Region Planning Department, Annual Building Permit Activity Review, March 2010.

3.0 RESIDENTIAL GROWTH

3.1 TOTAL RESIDENTIAL BUILDING PERMIT VALUE IN CLARINGTON

In 2009, the value of residential building permits issued in Clarington totaled \$80.59 million⁷, which was the lowest value of residential building permits issued by the Municipality in the last decade. As shown in Figure 4, the total value of residential building permits issued in 2009 was down 46% from the 2008 value, returning to just under the 2001 value of \$83.96 million. The Municipality has averaged \$97.64 million in annual residential building permit value between 1993 and 2009, due to building permit values of over \$100 million between 2003 and 2008. The significant decrease in residential building permit value in 2009 was primarily attributed to poor economic conditions resulting in a decreased demand for new residential units.

Figure 4: Total Building Permit Value in Clarington, 1993-2009



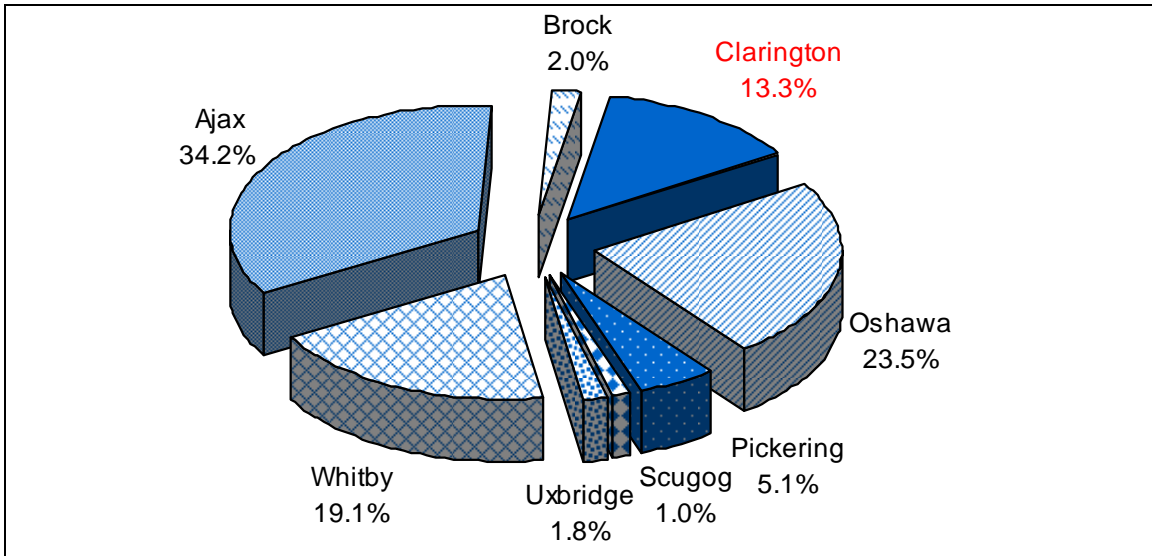
3.2 SHARE OF NEW RESIDENTIAL BUILDING PERMIT VALUE IN DURHAM REGION

As Figure 5 (next page) shows, Clarington’s residential building permits issued in 2009 ranked fourth in value for all of Durham Region, contributing 13.3% of the total value⁸. Clarington’s share decreased 6.9% from 2008 when the Municipality contributed about 20.2% of the total residential building permit value for Durham Region.

⁷ Municipality of Clarington, Engineering Services Department, January 2010.

⁸ Durham Region Planning Department, Annual Building Permit Activity Review, March 2010.

Figure 5: Share of Total Residential Building Permit Value in Durham Region, 2009



3.3 NEW RESIDENTIAL UNIT PRODUCTION IN CLARINGTON

In 2009, residential building permits were issued for 273 new units in Clarington, which was down 54% from the 593 permits issued in 2008⁹. Historically, the number of new residential units approved for construction has averaged at 687 units per year since 1994. The number of building permits issued in 2009 falls short of this number by 414 units or 60%, which accounts for the significant decline in the total value of residential construction in the Municipality for the year.

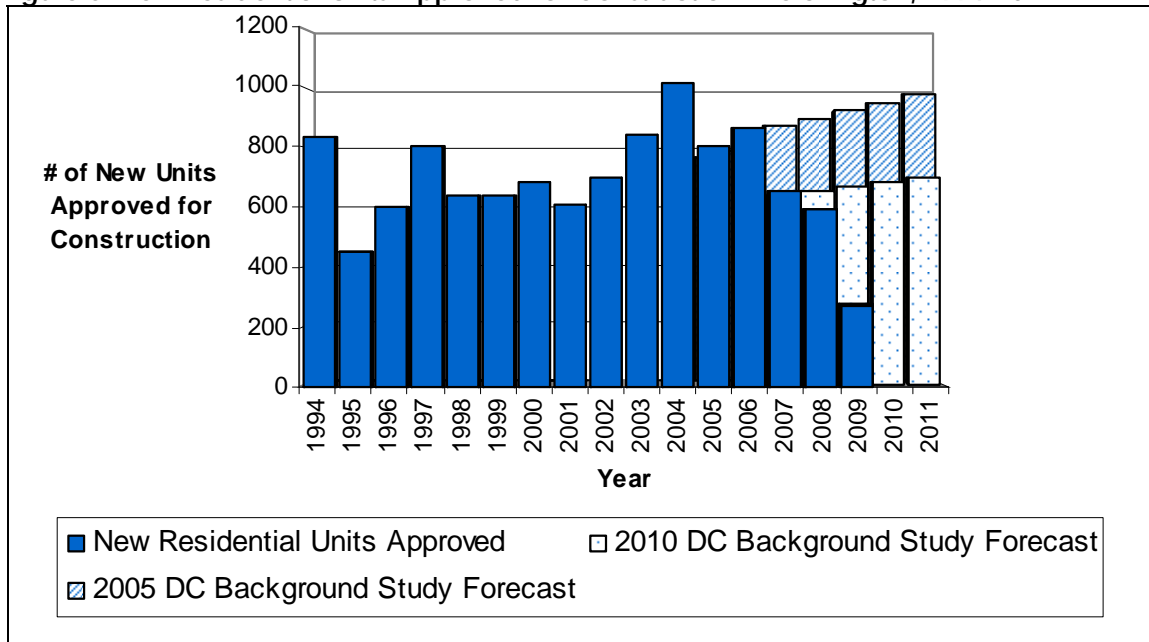
In addition, the number of building permits issued for new residential units has fallen significantly short of the forecast made in the 2005 Development Charges Background Study¹⁰ (Figure 6, next page). The economic environment has changed substantially since 2005 and as a result of tightened credit markets and other economic factors, the demand for new residential units has been lower than expected. The 2010 Development Charges Background Study¹¹ forecasts residential unit growth reflective of economic conditions, however, the new residential units approved in 2009 are still considerably lower than initially anticipated. Figure 6 (next page) also shows these projections, which estimate nearly 300 permits less per year than what was projected by the 2005 Study.

⁹ Municipality of Clarington, Engineering Services Department, January 2010.

¹⁰ Hemson Consulting Ltd., Development Charges Background Study, May 2005.

¹¹ Hemson Consulting Ltd., Development Charges Background Study, April 2010.

Figure 6: New Residential Units Approved for Construction in Clarington, 1994-2011



The growing urban centres of Bowmanville, Courtice and Newcastle continue to make the strongest contributions to the total number of new residential units approved for construction in Clarington. In 2009, these centres accounted for 86% of new residential units approved for construction in the Municipality¹² (Table 2, continued on next page). The share contributed by each community remained relatively stable between 2008 and 2009, with the exception of the shift in share made between Bowmanville and Courtice, and a notable increase in share by the Clarke rural area and the hamlet of Solina.

Table 2: Residential Building Permits by Area in Clarington, 2008-2009

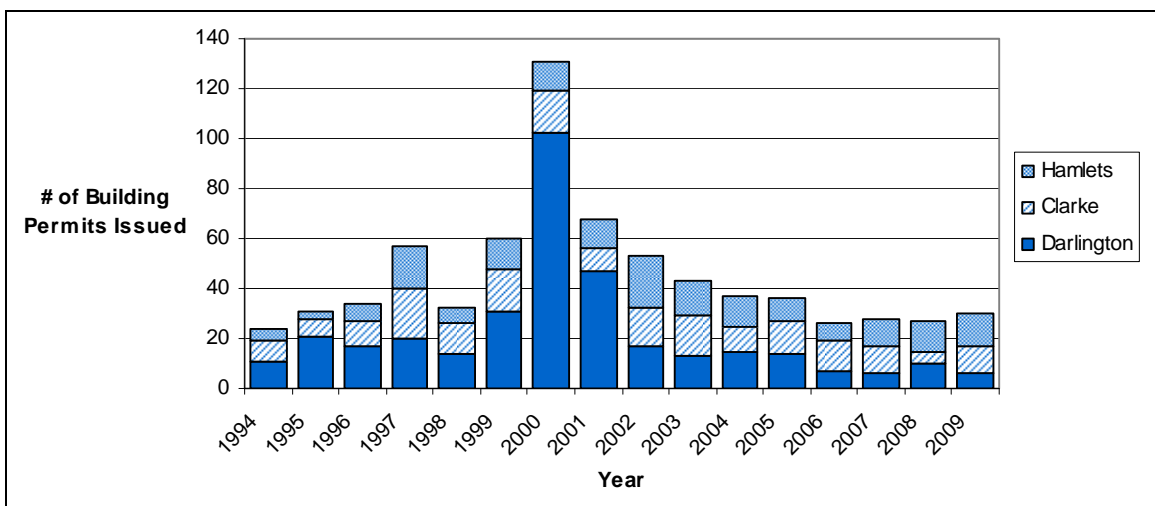
Area	2009		2008		2008-2009 Change
	Units	% Share	Units	% Share	
Bowmanville	98	35.90%	340	57.34%	-21.44%
Courtice	112	41.03%	134	22.60%	18.43%
Newcastle	24	8.79%	60	10.12%	-1.33%
Wilmot Creek	9	3.30%	30	5.06%	-1.76%
Orono	0	0.00%	2	0.34%	-0.34%
Darlington	6	2.20%	10	1.69%	0.51%
Clarke	11	4.03%	5	0.84%	3.19%
Burketon	0	0.00%	0	0.00%	0.00%
Enfield	0	0.00%	0	0.00%	0.00%
Enniskillen	2	0.73%	0	0.00%	0.73%
Hampton	0	0.00%	0	0.00%	0.00%

¹² Municipality of Clarington, Engineering Services Department, January 2010.

Area	2009		2008		2008-2009 Change
	Units	% Share	Units	% Share	
Haydon	0	0.00%	0	0.00%	0.00%
Kendal	1	0.37%	0	0.00%	0.37%
Kirby	0	0.00%	0	0.00%	0.00%
Leskard	0	0.00%	0	0.00%	0.00%
Maple Grove	0	0.00%	0	0.00%	0.00%
Mitchells Corners	0	0.00%	0	0.00%	0.00%
Newtonville	5	1.83%	7	1.18%	0.65%
Solina	5	1.83%	0	0.00%	1.83%
Tyrone	0	0.00%	5	0.84%	-0.84%
TOTALS	273	100.00%	593	100.00%	0.00%

As shown in Figure 7, the number of building permits issued in rural areas of the Municipality has fluctuated greatly over the years, but recently has settled back to levels observed in the mid 1990's¹³. This reduction in building permits issued within rural areas is a positive trend as the Provincial Policy Statement (2005) and the Municipality of Clarington Official Plan (1996) both direct growth to urban areas. Residential growth in Clarington's rural areas has already exceeded the targets set out by the 1996 Official Plan, and is anticipated to continue to decline as the rural population stabilizes at a sustainable level.

Figure 7: Residential Building Permits in Rural Areas of Clarington, 1994-2009



In 2009, building permits issued for single detached homes dominated all other activity. The share of permits for single detached dwellings increased by approximately 1% from 2008 to 2009, controlling about 76%

¹³ Municipality of Clarington, Engineering Services Department, January 2010.

of the market during the last calendar year¹⁴; however the number of such permits decreased by more than half from 2008 to 2009. The number of permits issued for semi-detached dwellings and townhouses was also lower in 2009, with an 86% decrease in building permits issued for townhouses compared to the previous year. Building permits issued for apartment developments, however, held a 4.4% market share compared to only 0.84% market share in 2008 (Table 3).

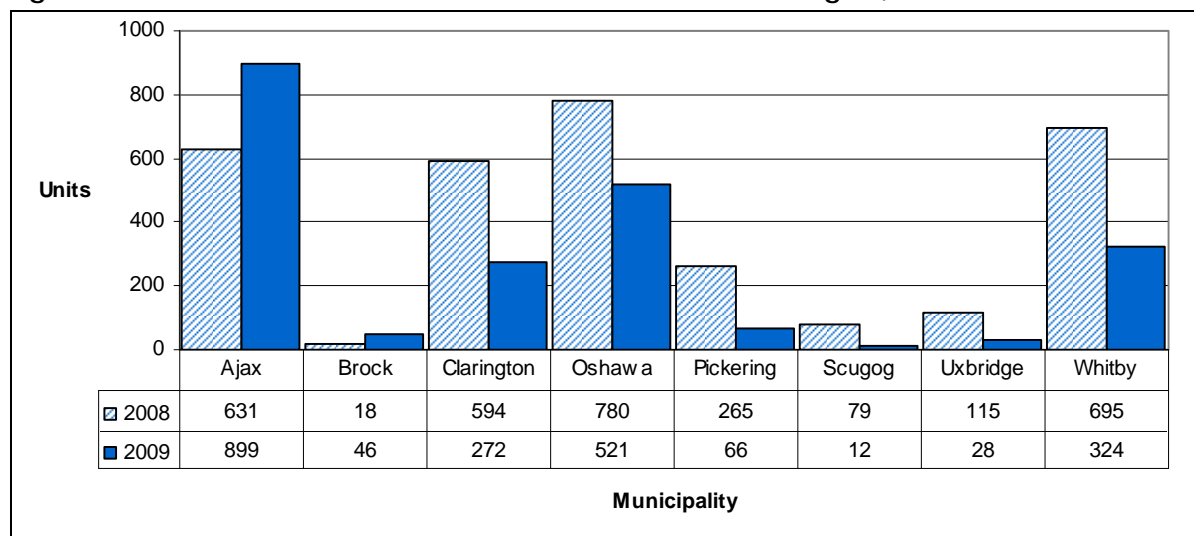
Table 3: New Residential Units in Clarington by Type, 2008-2009

Type of New Residential Unit	2009	% Share	2008	% Share
Single Detached	208	76.19%	447	75.38%
Semi-Detached	46	16.85%	92	15.51%
Townhouse	7	2.56%	49	8.26%
Apartment	12	4.40%	5	0.84%
TOTALS	273	-	593	-

3.4 SHARE OF NEW RESIDENTIAL UNIT PRODUCTION IN DURHAM REGION

In 2009, Durham Region municipalities issued building permits for a total of 2,168 new residential units, a decrease of 32% from 3,177 in 2008¹⁵ (Figure 8). Clarington's share of the total number of new residential units in 2009 was 12.5%, down from 18.7% in 2008, and ranked fourth under Whitby, Oshawa and Ajax. Ajax and Brock were the only municipalities in the Region in 2009 that saw an increase in residential unit production, at 30% and 61%, respectively.

Figure 8: Share of New Residential Unit Production in Durham Region, 2008-2009



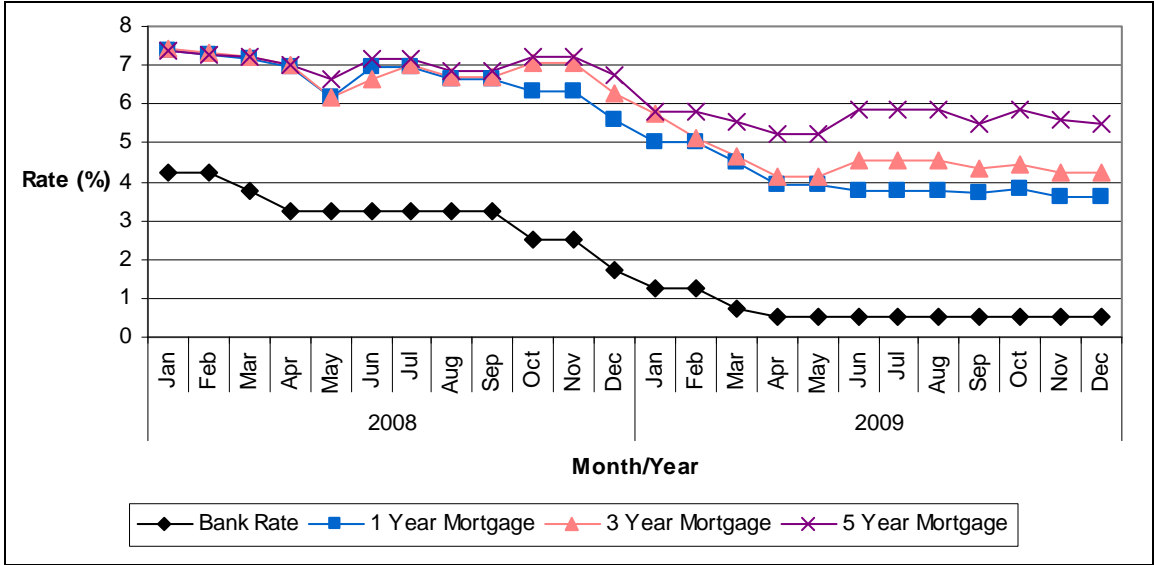
¹⁴ Municipality of Clarington, Engineering Services Department, January 2010.

¹⁵ Durham Region Planning Department, Annual Building Permit Activity Review, March 2010.

3.5 HOUSING MARKET INDICATORS

The average one, three and five year mortgage rates were significantly lower in 2009 as the economy continued to recover, at 4.02%, 4.57% and 5.63%, respectively, in comparison to the 2008 rates, which were 6.70%, 6.87% and 7.06%, respectively¹⁶ (Figure 9). After a considerable drop at the end of 2008 and beginning of 2009, the bank rate remained stable, at 0.5%, from April to December 2009.

Figure 9: Average Monthly Bank Interest Rates, 2008-2009

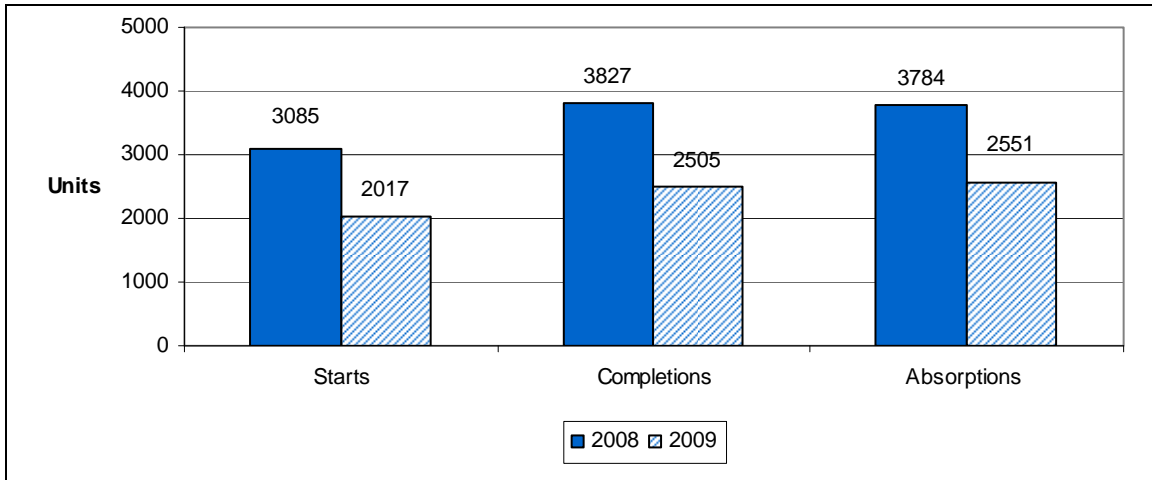


In spring 2009, Canada Mortgage and Housing Corporation (CMHC) reported that “mortgage rates are expected to be relatively stable throughout 2009, remaining within 25-75 basis points of their current levels,”¹⁷ which can be seen in Figure 9. The 2010 CMHC base case scenario reports that “mortgage rates are expected to gradually rise over the course of 2010 and 2011, but will remain very low in a historical context”¹⁸.

The number of housing starts was 2,017 in Durham Region for 2009, which was down 35% from 3,085 in 2008. The number of housing completions was also down 35% from 3,827 in 2008 to 2,505 in 2009. Similarly, housing absorptions decreased 33% from 3,784 in 2008 to 2,551 in 2009¹⁹ (Figure 10 next page).

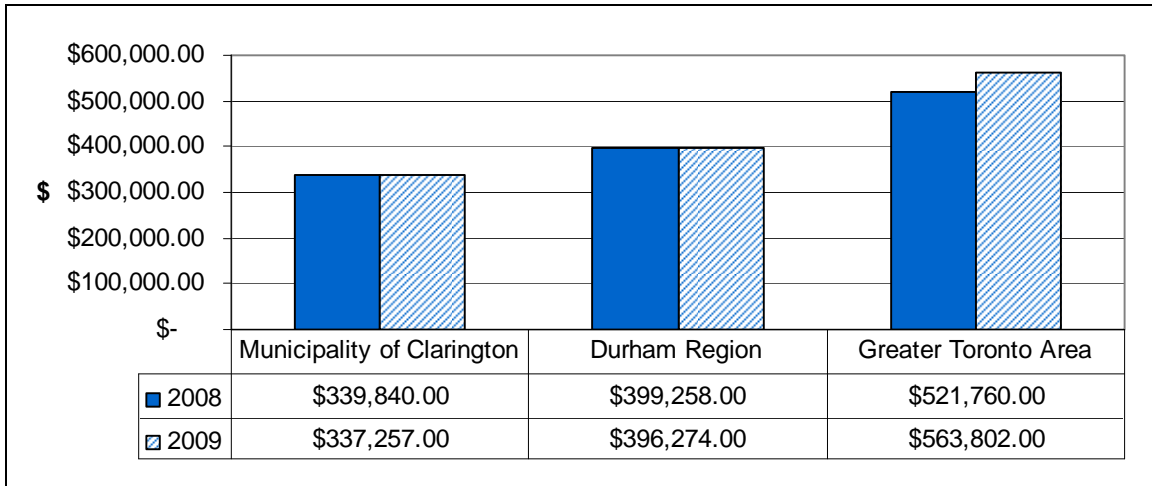
¹⁶ Bank of Canada, Canadian Interest Rates and Monetary Policy Variables, 2008-2009.
¹⁷ Canada Mortgage and Housing Corporation, Housing Market Outlook – Greater Toronto Area, Spring 2009.
¹⁸ Canada Mortgage and Housing Corporation, Housing Market Outlook – Canadian Edition, Spring 2010.
¹⁹ Canada Mortgage and Housing Corporation, Housing Now - Greater Toronto Area, January 2010.

Figure 10: Housing Starts, Completions and Absorptions in Durham Region 2008-2009



The average price of new completed and absorbed single detached dwellings in Durham Region remained stable, dropping only slightly from \$399,285 in 2008 to \$396,274 in 2009. In Clarington, prices also remained stable, only decreasing from \$339,840 in 2008 to \$337,257 in 2009²⁰ (Figure 11). Clarington continues to be an affordable place to live within Durham Region and the Greater Toronto Area.

Figure 11: Housing Prices for Single Detached Homes, 2008-2009



Although the number of residential building permits issued annually has declined over the last few years, the average price of single detached dwellings in Clarington has continued to increase at a steady pace from 2004 to 2008, with a decrease of less than 1% experienced in 2009 (Figure 12 next page).

²⁰ Canada Mortgage and Housing Corporation, Housing Now - Greater Toronto Area, January 2010.

Figure 12: Average Value of Single Detached Dwellings versus Number of New Residential Units Approved, 2004-2009



3.6 SHORT-TERM POPULATION FORECAST

The 2010 Development Charges Background Study estimated the Municipality of Clarington’s population for 2009 to be 86,103²¹ and the total number of households to be 28,850²². Durham Region estimated its population to be 621,120 and the total number of households to be 210,216²³. The estimation of population for Durham may be 15,000 to 25,000 persons higher than the actual population when compared to the 2006 census projections and growth rates for the Region.

Clarington’s estimate had 2.87 people per household²⁴, while the Statistics Canada 2006 census results show that Clarington had 2.9 people per household²⁵. This statistic matches the trends predicted by Clarington’s 2010 Development Charges Background Study. Census data shows that household sizes are decreasing in Clarington, which is a reflection of the older population attracted to the area. However, the decrease in household size has not occurred as predicted by the 2005 Development Charges Background Study.

²¹ Population forecasts include census undercount.

²² Hemson Consulting Ltd., Development Charges Background Study, April 2010.

²³ Growing Durham, Annotated Consolidation of Regional Official Plan Amendment Number 128, June 3, 2009.

²⁴ Hemson Consulting Ltd., Development Charges Background Study, April 2010.

²⁵ Statistics Canada, www.statcan.ca Clarington Community Profile, 2006.

The Growing Durham Annotated Consolidation of Regional Official Plan Amendment Number 128 indicates that Durham’s population is expected to reach approximately 632,560 by the end of 2010 and 643,980 by the end of 2011²⁶, which represents a growth rate of 1.77% annually. For the same period, the 2010 Development Charges Background Study indicates that Clarington’s population is expected to grow to approximately 87,899 by the end of 2010 and reach 89,731 by the end of 2011²⁷. This represents a growth rate of 2.0% annually.

Durham Region is expected to have approximately 215,408 households by the end of 2010 and 220,600 by the end of 2011²⁸. The number of households in Clarington is expected to grow to approximately 29,532 by the end of 2010 and 30,231 by the end of 2011²⁹, as shown in Table 4.

Table 4: Short-Term Population & Household Estimates for Clarington and Durham Region, 2009-2011

Year	Clarington Population	Durham Region Population	% Population Share of Region for Clarington	Clarington Households	Durham Region Households	% Households Share of Region for Clarington
2009	86,103	621,120	13.86%	28,850	210,216	13.72%
2010	87,899	632,560	13.90%	29,532	215,408	13.71%
2011	89,731	643,980	13.93%	30,231	220,600	13.70%

²⁶ Growing Durham, Annotated Consolidation of Regional Official Plan Amendment Number 128, June 3, 2009.

²⁷ Hemson Consulting Ltd., Development Charges Background Study, April 2010.

²⁸ Growing Durham, Annotated Consolidation of Regional Official Plan Amendment Number 128, June 3, 2009.

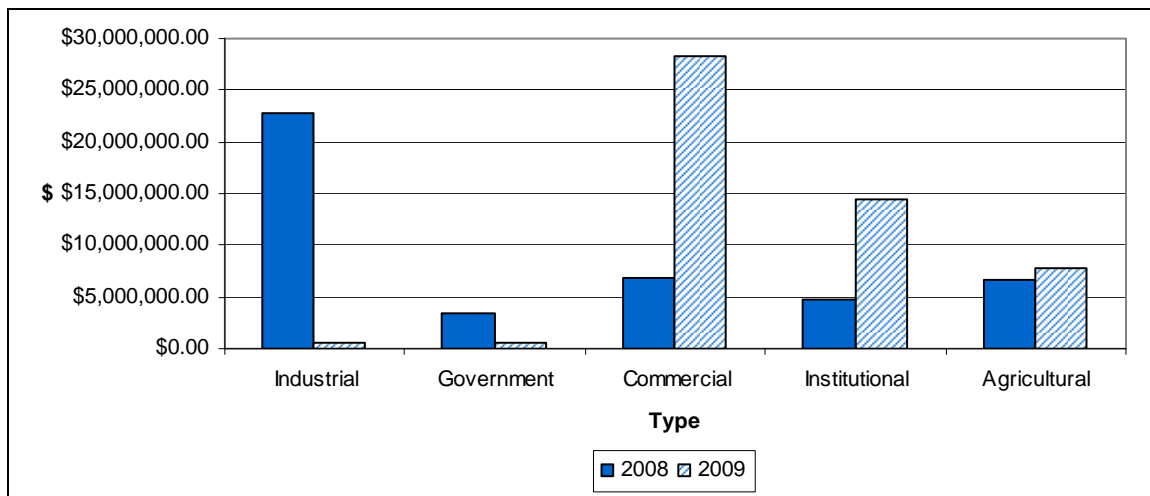
²⁹ Hemson Consulting Ltd., Development Charges Background Study, April 2010.

4.0 NON-RESIDENTIAL GROWTH

4.1 TOTAL NON-RESIDENTIAL BUILDING PERMIT VALUE IN CLARINGTON

The value of non-residential building permits issued in Clarington during 2009 was \$51.57 million, an increase of 16% from 2008 when the value of building permits issued in Clarington topped \$44.45 million. This overall rise in the non-residential building permit value in 2009 was due to a 316% increase in the value of commercial building permits issued and a significant increase (203%) in building permit value in the institutional category³⁰. The decrease in the value of industrial building permits was substantial, down 97% from 2008, but was offset by the increase in value of the commercial and institutional categories (Figure 13). In 2009, the value of agricultural building permits issued by the Municipality of Clarington was up about 17% over the 2008 value.

Figure 13: Non-Residential Building Permit Value in Clarington, 2005-2009



The following list highlights the major non-residential building projects reported in 2009:

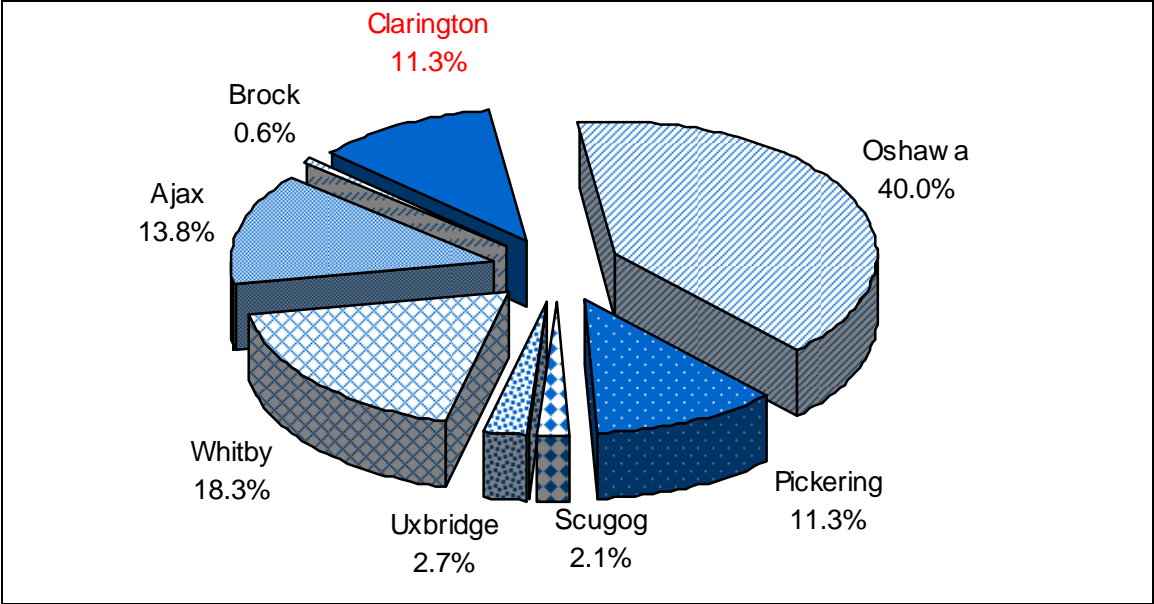
- Tech Shop building and addition to St. Stephen's Secondary School, Bowmanville (\$13.7 million)
- Lange's Photo and Bethesda House, Bowmanville (\$677,447)
- Algoma Orchards addition to apple packing plant, Clarke (\$900,000)
- Shoeless Joe's restaurant, Courtice (\$1.7 million)
- Wal-Mart, Bowmanville (\$23.3 million)
- Witzke Greenhouses expansion, Courtice (\$2.8 million)
- Staples and The Beer Store, Bowmanville (\$625,000)

³⁰ Municipality of Clarington, Engineering Services Department, January 2010.

4.2 SHARE OF NON-RESIDENTIAL BUILDING PERMIT VALUE IN DURHAM

A rise in the non-residential building permit value for Clarington in 2009 increased the Municipality’s share of the total non-residential building permit value within Durham Region from 7.8% in 2008 to 11.3% in 2009 (Figure 14). Clarington had the most significant change year over year within Durham Region. Oshawa, Pickering and Scugog experienced the most significant decreases in share from 2008 to 2009, down 2.5%, 1.5% and 1.9%, respectively, while Ajax made significant gains, up 2.3% in share for the last calendar year. Uxbridge had a slight increase in share while Brock and Whitby remained relatively neutral^{31, 32}.

Figure 14: Share of Total Non-Residential Building Permit Value in Durham Region, 2009



4.3 NON-RESIDENTIAL FLOOR SPACE PRODUCTION IN CLARINGTON

Clarington’s production of non-residential floor space increased 73.2% or 156,400 square feet from 213,700 square feet being added in 2008 to 370,100 square feet being added in 2009. This returned Clarington to the level of production seen in 2007 which was followed by a sharp decline in 2008. Of the municipalities in Durham Region, Clarington made the only increase in non-residential floor space production from the previous year. Uxbridge remained relatively unchanged from 2008 to 2009 while Ajax (-24.7%), Brock (-68.0%), Oshawa (-19.5%), Pickering (-42.8%), Scugog (-45.1%) and Whitby (-16.2%) experienced significant decreases in non-residential floor space production for 2009³³.

³¹ Municipality of Clarington, Engineering Services Department, January 2010.
³² Durham Region Planning Department, Annual Building Permit Activity Review, March 2010.
³³ Durham Region Planning Department, Annual Building Permit Activity Review, March 2010.

5.0 SYNOPSIS AND SHORT-TERM OUTLOOK

5.1 RESIDENTIAL BUILDING PERMIT ACTIVITY

Overall, the pace of new residential building permit activity in the Municipality of Clarington decreased by 53.96% from 2008 to 2009, while the value decreased by 45.89%. Durham Region experienced a decrease of 17.96% in residential building permit value for 2009. Clarington's share of residential building permit activity within Durham Region for 2009 decreased (-6.9%) to only 13.3% of the value for permits issued throughout the Region since 2008. The Municipality brought in the fourth greatest residential building permit value in the Region behind Whitby (19.1%), Oshawa (23.5%) and Ajax (34.2%).

CHMC is forecasting that 2010 will see a strong improvement in housing starts for both single detached and multi-family dwellings as the economy recovers from the downturn of 2009. Nationally, single detached starts will increase from 75,659 units in 2009 to 86,450 units in 2010, with a slight decrease in 2011 to 85,850 units. This will be complemented by approximately 84,800 multiple unit starts in 2010, "increasing to 89,300 units in 2011 as stronger economic activity and employment support housing demand"³⁴. However, CMHC also projects that "measures recently announced for government-backed mortgage insurance will moderate housing starts activity. Some potential buyers will have to save a larger down payment to offset higher qualifying mortgage rates and thus postpone their purchase of new housing"³⁵.

These housing start projections, however, are national in scope and due to the implementation of the provincial Growth Plan (2006) may not be reflective of Clarington's future residential building permit activity. As Clarington brings its Official Plan into conformity with provincial policy, intensification will increase, thereby resulting in a rise in share of multi-family dwelling starts and a decrease in share of single detached dwelling starts.

5.2 NON-RESIDENTIAL BUILDING PERMIT ACTIVITY

Overall, the non-residential building permit activity in Clarington has decreased by 10.1% in 2009, while the value increased by 16.0%. Durham Region experienced a decrease of 19.6% in non-residential building permit value for 2009. The Municipality of Clarington was virtually tied with Pickering for the position of fourth largest share (11.3%) of non-residential

³⁴ CMHC, Housing Market Outlook, Canadian Highlights – First Quarter 2010.

³⁵ CMHC, Housing Market Outlook, Canadian Highlights – First Quarter 2010.

building permit value within Durham Region. The value of non-residential building permits in Durham for 2009 at \$458.2 million was similar to the values realized throughout the mid-2000's.

In Ontario and across the country, investment in non-residential building permit activity was down slightly in 2009. This downward trend continued for the first quarter of 2010. Institutional projects continue to grow in value, however the country has continued to see a sharp decline in commercial building investment³⁶. In contrast, Clarington saw tremendous commercial building value growth in 2009. The Royal Bank of Canada states that the fourth quarter of 2009 saw more growth than originally expected and prospects for 2010 have brightened. Most advanced economies and some emerging economies around the world are expected to grow moderately throughout 2010 and into 2011³⁷.

A number of major infrastructure projects are anticipated in Clarington over the coming years that will enhance Clarington's non-residential building permit values:

- OPG New Build, new office and training complex, refurbishment of Darlington reactors and facilities
- GO Rail extension to Bowmanville (construction of stations)
- Durham/York Energy from Waste Facility
- Highway 407 (construction of maintenance facilities)

These projects will stimulate the local economy and support other non-residential and residential development.

³⁶ Statistics Canada, The Daily www.statscan.gc.ca

³⁷ RBC Economics & Financial Market Outlook, March, 2010, www.rbc.com/economics/market/pdf/fcst.pdf