

## REPORT

### PLANNING AND DEVELOPMENT COUNCIL MEETING

MEETING DATE: APRIL 15, 2019

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**FROM:** Economic Development

**DATE:** March 6, 2019

**SUBJECT:** Economic Development 2018 Annual Report

**LOCATION:**

**WARD:** Town wide

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#### **RECOMMENDATION:**

That the staff report from the Economic Development department entitled *Economic Development 2018 Annual Report*, dated March 6, 2019 be received.

#### **KEY FACTS:**

The following are key points for consideration with respect to this report:

- Council approved the Economic Development Strategy in 2009
- The purpose of this document is to provide Council with an update on 2018 economic activity, competitive positioning, and departmental initiatives
- This report and presentation are provided to Council for information

#### **BACKGROUND:**

In 2009, Council approved the Town's Economic Development Strategy, a comprehensive 10-year plan developed in consultation with the business community. The deliverables in the strategy include annual reporting to Council.

The 2018 annual report is the final update to the 10-year strategy. In 2019, the department will bring forward to Council a new strategy to further strengthen and diversify the Oakville economy over the next five years.

#### **COMMENT/OPTIONS:**

2018 was a year of economic growth in Oakville. Celebrated as *Canada's Best Place to Live*, Oakville experienced new development activity, company expansions, new company arrivals, and the emergence of a new cluster of innovation in additive manufacturing.

## OF NOTE IN 2018

### Canada's Best Place to Live

In 2018, MoneySense Magazine recognized Oakville as *Canada's Best Place to Live* and *Best Place for New Canadians*. Factors such as household income, quality jobs, community safety, and top performing schools were key determinants in Oakville's top ranking. In addition to highlighting livability, these factors are also indicators of a healthy local economy and are key elements for investment attraction.

### Political Change

The legalization of cannabis and the anticipated economic impact on municipalities was evaluated in 2018 as local governments were tasked with determining whether or not to play a role in the retail market. Although Oakville has opted out of retail cannabis for the time being, the Ontario Cannabis Store Distribution Centre opened operations in town in 2018, occupying a 70,000 sq. ft. facility and employing approximately 100 workers.

At the provincial level, a change in party leadership has brought about new government policy and program direction. The department will continue to participate in consultation with the province regarding policy areas affecting local economic growth.

## OAKVILLE BUSINESS UPDATE

*Canada's Best Place to Live* can also be viewed as Canada's best place to work. New and existing companies continue to find success in Oakville's diverse economy. According to the Conference Board of Canada, the town's GDP (gross domestic product) reached \$10.9 billion in 2018, an increase from \$7.7 billion in 2009. Oakville's unemployment rate remained low at 5.03 per cent, below the provincial average of 5.9 per cent. Notwithstanding the departure of one of Oakville's major companies, the total development activity in 2018 evidenced a period of strong economic growth.

### Tim Hortons Departure

In 2018, Oakville lost a major employer after more than 50 years of operation in the community. Tim Hortons moved its Canadian headquarters to downtown Toronto to gain access to a young labour market and changing customer base.

Tim Hortons continues to retain a presence in Oakville through the Tim Hortons University training centre for franchisees and managers on Wycroft Road. The remainder of the company's 100,000 sq. ft. Oakville site consists of two buildings and is currently available for sale or lease.

**New Company Arrivals**

Oakville is proud to welcome new companies to the community each year. The list below highlights major new employers commencing operations in Oakville in 2018. Together, these companies created a combined total of more than 1,600 jobs in the community. Most notably, Aviva Canada, a property and casualty insurance company, moved into their new Canadian headquarters on North Service Road in June, bringing 700 jobs to Oakville.

Company Name	Job Count	Description
Aviva Canada	700	Insurance
GVA Lighting	150	Manufacturing
Farm Boy	150	Canadian grocery retailer
ErinoakKids	140	Children’s treatment centre
Metrolinx	100	Transit operations
Ontario Cannabis Store Distribution Centre	100	Distribution
KPM Industries	80	Construction and packaged materials
Burloak Technologies	80	Additive manufacturing
WW (formerly Weight Watchers)	75	Health and wellness
Gyptech Manufacturing	50	Manufacturing
Muir Tapes & Adhesives	35	Manufacturing

**Oakville Company Growth**

Several Oakville companies invested in expansions in 2018. Leading telematics firm Geotab and engineering firm McIntosh Perry retained operations in Oakville, moving into larger facilities to accommodate rapid company growth. Europhins Alphora, a contract research, development and manufacturing company for the pharmaceutical industry, and Rockstar Games, an industry leading video game company undertook expansions to their existing locations to increase operational capacity.

Several Oakville companies were successful in securing major contracts and funding support for continued growth:

- Laker Energy received a \$144 million contract for Bruce Power’s Major Component Replacement Project, which is anticipated to have a number of high-tech spinoff jobs for Oakville.
- Siemens Canada secured a major order with VIA Rail Canada for a new fleet of passenger trains valued at over \$989 million.

- GVA Lighting received a \$2.5 million federal loan to triple production capacity and invest in manufacturing to scale up for growth in their new Oakville facility.
- Four Oakville companies received funding through Agriculture and Agri-Food Canada's federal-provincial *Growing Forward 2* program:
  - Maverick Distillery Limited: \$54,000 to purchase new distilling process equipment to support the development of new products, expand domestic markets, and access global markets.
  - David Roberts Food Corp.: \$89,000 to purchase and install an automated packaging machine to increase automation, enhance labour productivity, and improve operational efficiency.
  - Reunion Island Coffee: \$100,000 to purchase and install new packaging equipment to increase labour and productivity.
  - S/M Enterprises: \$100,000 to purchase and install new equipment to increase automation and labour productivity to meet increased market demand.

### **Emerging Cluster: Additive Manufacturing**

In 2018, significant activity occurred within the manufacturing sector in the area of additive manufacturing. Private and public sector investment, collaboration, and industry partnership signaled the emergence of a new cluster of innovation and expertise in Oakville.

Also referred to as 3D printing, additive manufacturing is a faster, and more environmentally friendly manufacturing process. The technology has broad applications spanning several of Oakville's key sectors, including automotive, aerospace, energy, industrial, and healthcare.

Oakville's additive manufacturing cluster will play a key role in supporting the sustainability of the town's manufacturing base. The technology will enhance the manufacturing supply chain locally, and provide an opportunity for Oakville companies to innovate and grow.

According to the National Sciences and Engineering Research Council of Canada, the 3D printing industry is projected to grow fivefold by 2020. Additive manufacturing has been identified as a priority area of innovation and job growth for the Canadian economy.

### **Additive Manufacturing in Oakville:**

- **Additive Manufacturing Centre of Excellence:** Burloak Technologies, a division of Samuel, Son & Co. opened a 60,000 sq. ft. state-of-the-art facility specializing in additive manufacturing on the South Service Road in 2018.

The Centre of Excellence was established to help companies adopt 3D printing processes by taking additive manufacturing from concept through to design and production.

In May, the federal government announced a loan of \$14 million to support the opening of the Centre of Excellence through the Strategic Innovation Fund. The provincial government also invested up to \$7 million in the new facility through the Jobs for Prosperity Fund.

- **Company Collaboration:** Oakville company Javelin Technologies announced an integrated partnership with Cimetrix Solutions in 2018. The partnership combines the specialization of both firms to improve service to the 3D printing market and better positions both companies for growth. By coordinating services, the companies can provide support to students, and small to large-scale manufacturers.
- **Industry Network Partnership:** Oakville company Promotion joined *Canada Makes* in 2018, a network of private, public, academic, and non-profit entities dedicated to promoting the adoption and development of advanced and additive manufacturing in Canada.

Promotion has also partnered with the University of Waterloo's Multi-Scale Additive Manufacturing Lab to develop the next generation of metal additive manufacturing processes. In 2018, the Government of Canada invested \$5.5 million in the University of Waterloo-led initiative through the National Sciences and Engineering Research Council of Canada.

- **Next Generation Manufacturing Supercluster (NGen):** The federal government announced a \$230 million investment to support the growth of an Ontario-based Next Generation Manufacturing Supercluster (NGen). NGen was created to support next generation manufacturing capabilities in Ontario, including additive manufacturing, and will be matched dollar for dollar by the private sector.

## MAJOR CONSTRUCTION PROJECTS

Major construction projects completed in 2018 created facilities for new company arrivals. New developments include:

- Melrose Investments: 100,000 sq. ft. industrial building on South Service Road (Additive Manufacturing Centre of Excellence)
- Metrolinx: 40,000 sq. ft. industrial building on Cornwall Road (Metrolinx Transit Operations)
- Carttera: 89,000 sq. ft. two-story flex office building on Joshuas Creek Drive (WW Canadian Headquarters)

- Fengate: 30,000 sq. ft. one-story flex office building on Michigan Drive (KPM Industries)

**COMMERCIAL INDUSTRIAL REAL ESTATE MARKET**

The Economic Development department monitors the commercial industrial real estate market to assess the town’s supply of shovel-ready land and available buildings for continued investment.

**Office Market**

Oakville’s office market absorption totaled more than 216,000 sq. ft. in 2018 with an additional 170,000 sq. ft. under construction. Total office market inventory reached 4.2 million sq. ft in Q4, an increase from 4 million in the same quarter in 2017.

Oakville’s office vacancy rate continued to decrease in 2018 reaching 19.2 per cent in Q4, down from 22.2 per cent in Q4 2017.

Office Market			
Inventory (sq. ft.)	Vacancy Rate	Vacant Space (sq. ft.)	Weighted Avg. Net Rental Rate (per sq. ft.)
4.2 M	19.2%	799,265	\$18.99

Source: CBRE Marketview Snapshot, Oakville Office Q4 2018

**Industrial Market**

Oakville’s industrial market availability remained low in Q4 2018 at 5.1 per cent. Average sale and lease prices for industrial space increased in 2018 due to limited availability and the absorption of new product developed in 2017.

Industrial Market				
Inventory (sq. ft.)	Availability Rate	Avg. Sale Price (per sq. ft.)	Avg. Net Rental Rate (per sq. ft.)	TMI (per sq. ft.)
18.2 M	5.1%	\$220.62	\$7.27	\$3.47

Source: CBRE Marketview Snapshot, Oakville Industrial Q4 2018

**DEVELOPMENT ACTIVITY**

**Non-residential Assessment**

Oakville’s non-residential tax base represents 13.02 per cent of the total assessment base and contributes 18.24 per cent of all town taxes levied. In 2018, this amounted to \$34.6 million in tax revenue collected.

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**Major Non-residential Investment**

Major non-residential investment projects include new office developments, interior alterations for new and expanding companies, and new retail developments.

In 2018, construction values for the top ten non-residential investment projects totaled over \$64 million. This is a decrease from \$185 million in 2017, which can be attributed to the high number of institutional projects in 2017, totaling \$91.3 million. The majority of new construction in 2018 was office development.

**Major Non-residential Investment  
 Highest Total Construction Value by Investment Project**

Address	Type	Area (sq. ft.)	Construction value (\$ millions)	Description
529 & 555 Michigan Drive	Commercial	133,350	\$18.6	Two new one-storey office buildings - Fengate's Oak West Corporate Centre
2770, 2884 & 2892 Portland Drive	Industrial	26,165	\$7.9	Interior alterations and facility addition - Europhins Alphora ( <i>Expansion</i> )
1335 North Service Road East	Commercial	54,702	\$7.6	Interior alterations - Aviva Canada head office ( <i>New company</i> )
1405, 1415, 1425, 1435 Cornwall Road	Commercial	53,492	\$7.5	Four new one-storey office buildings - Melrose Investments
3421 Superior Court	Commercial	82,312	\$7	New one-storey office building - Great Lakes Business Park
2440 Winston Park Drive	Commercial	89,199	\$4.1	Interior alterations - Geotab head office ( <i>Expansion</i> )
2578 Bristol Circle	Commercial	27,330	\$3.8	New one-storey office building - Winston Park
2771 Bristol Circle	Commercial	62,323	\$2.9	Interior alterations - GVA Lighting ( <i>New company</i> )
1011 Upper Middle Road E	Commercial	15,070	\$2.8	Shoppers Drug Mart
1907 Ironoak Way	Commercial	23,412	\$2.5	Farm Boy grocery store ( <i>New company</i> )

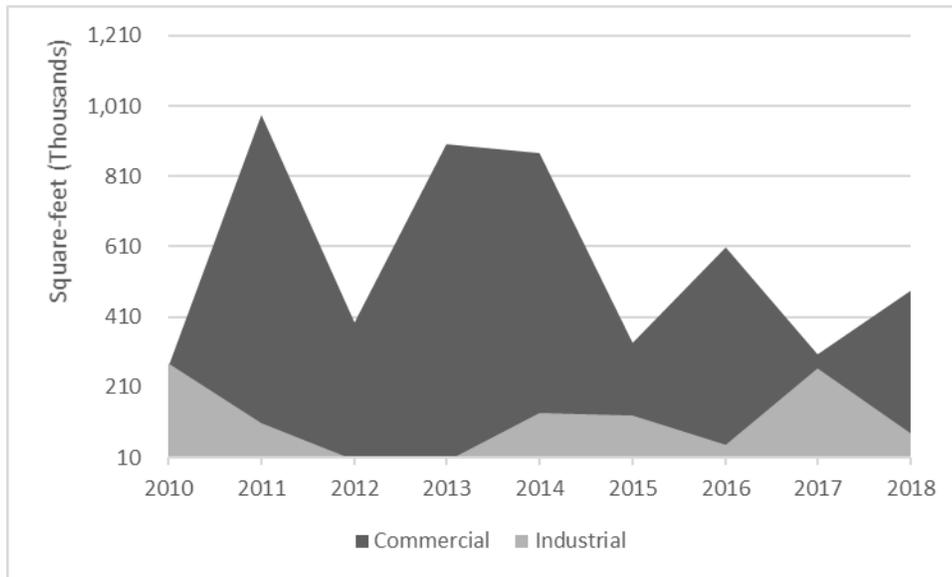
Source: Town of Oakville, Economic Development, AMANDA Building Permits

**BUILDING PERMIT ACTIVITY**

Development activity in Oakville historically follows a cyclical pattern of peaks and valleys, alternating between years of construction and absorption as evidenced in *Figure 1*, below.

As anticipated, the Oakville office market experienced an increase in development activity in 2018, following a valley year of low development and high absorption in 2017. Conversely, the Oakville industrial market transitioned into a valley period in 2018, as new development brought to market in 2017 was absorbed.

**Figure 1: Annual Square Footage of New Development (Includes Additions)**



Source: Town of Oakville, Economic Development, AMANDA Building Permits

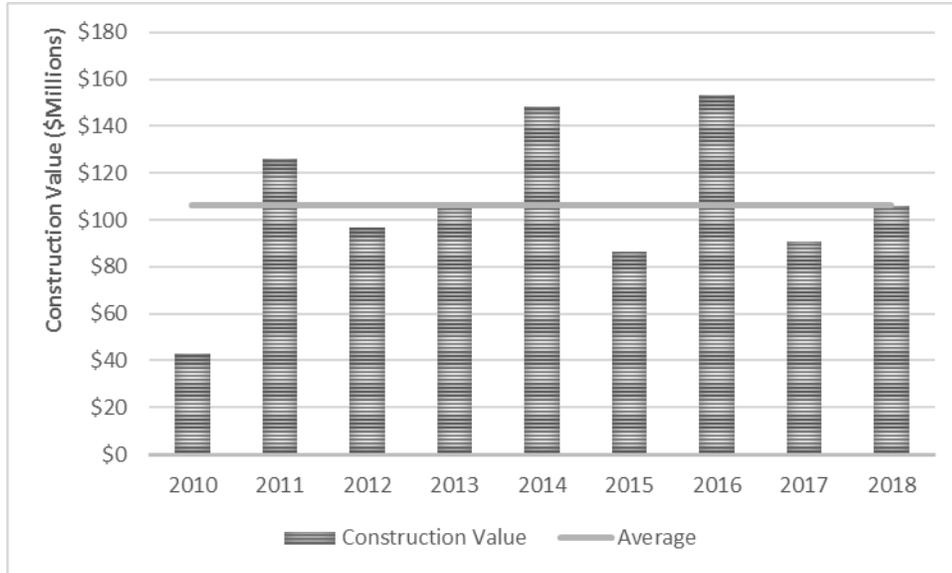
**Commercial Building Permit Activity**

Commercial construction values totaled \$105.9 million in 2018, an increase from \$90.7 million in 2017. The annual total construction value is consistent with the annual average of \$106 million as illustrated in *Figure 2*, below.

Construction value (\$)	Area (sq. ft.)	# of permits
\$105.9 M	1.3 M	279

Source: Town of Oakville, Economic Development, AMANDA Building Permits

**Figure 2: Commercial Building Permit Activity – All Permits Issued  
 Total Annual Construction Value**



Source: Town of Oakville, Economic Development, AMANDA Building Permits

**Industrial Building Permit Activity**

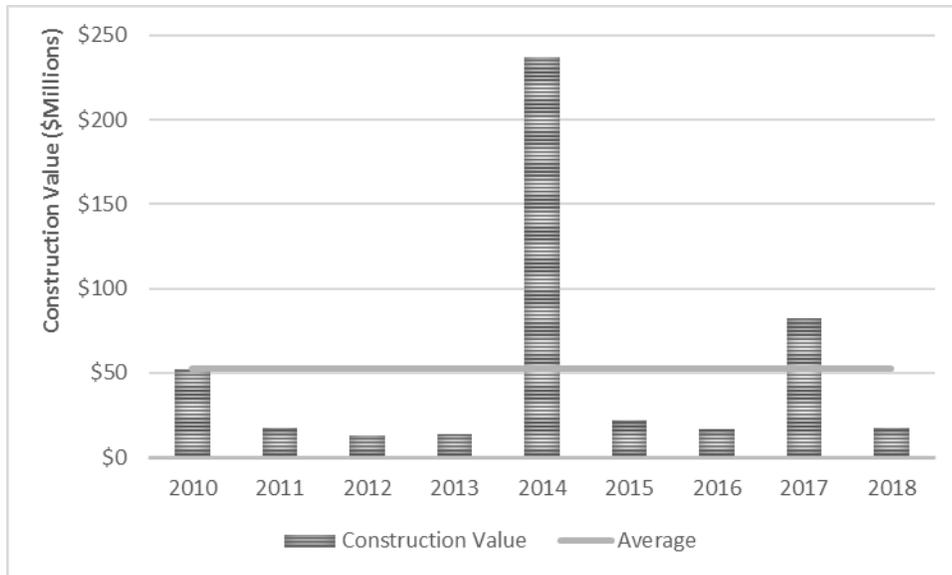
Industrial construction values totaled \$17.5 million in 2018, a decrease from \$82 million in 2017 following a year of higher than average industrial development.

Construction value (\$)	Area (sq. ft.)	# of permits
\$17.5 M	238,359	38

Source: Town of Oakville, Economic Development, AMANDA Building Permits

Annual industrial development activity since 2010 is displayed in *Figure 3*. As illustrated, 2017 construction exceeded expectations. In 2018, total construction returned to a level of expected growth and is consistent with the median construction value of \$17.5 million since 2010.

**Figure 3: Industrial Building Permit Activity – All Permits Issued  
 Total Annual Construction Value**



Source: Town of Oakville, Economic Development, AMANDA Building Permits

**Competitive Position**

Attracting new investment and supporting the growth of the existing business base are key components to ensuring the health of Oakville’s economy.

To understand how well Oakville is positioned for new investment, the Economic Development department benchmarks Oakville against 17 other Greater Toronto Area (GTA) municipalities to evaluate competitiveness in the categories of property taxes, development charges, and industrial land sale values.

As outlined in *Appendix A: Competitive Positioning*, Oakville’s commercial tax rates and development charges are competitive when compared to GTA municipalities with favourable rankings in the cost comparison.

Industrial tax rates, development charges, and land sale values are less competitive, with higher relative costs than over half of the GTA municipalities assessed.

**2018 DEPARTMENT INITIATIVES**

**New Five-year Economic Development Strategy:** In 2018, research and consultation were conducted to develop a new Economic Development strategy for Oakville with the goal to further strength and diversify the local economy. As the current award-winning strategy nears completion, the department is in need of a new strategy to guide work plans and priorities for the next five years. The department was successful in its application for federal funding for this project from the *Invest Canada – Community Initiatives* fund.

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## **Business Retention & Expansion**

**Downtown Mitigation Strategy:** Economic Development led a cross-departmental team in the development of a mitigation strategy for the Downtown Lakeshore Reconstruction Project. In September, Council endorsed the strategy, which aims to soften the impact of the Lakeshore Road reconstruction on the business district.

As part of these efforts, the Project Office for the reconstruction project officially opened in July. The office serves as a central location for information related to the reconstruction of Lakeshore Road. Liaison staff, located in the former Post Office on Church Street, will assume the implementation of the mitigation strategy through the duration of the project.

**Brownfields Community Improvement Plan (CIP):** The Brownfields CIP was approved by Town Council in July of 2018 and includes three financial incentive programs designed to promote private sector reinvestment in brownfields that will bring environmental, economic, and social benefits to the community. The program commenced in 2019 with the first application received in January.

**Ontario Auto Mayors:** Staff organized two Ontario Auto Mayors meetings to engage and inform mayors and stakeholders from across the province on trade negotiations, including the United States-Mexico-Canada Agreement (USMCA), formerly the North American Free Trade Agreement (NAFTA), and the Trans-Pacific Partnership (TPP).

**Corporate Calling:** Staff continue to build relationships with local companies to provide information and assistance through the department's corporate calling program, a proactive approach to connect with the business community.

**Outreach:** The department participated in outreach initiatives in 2018 with community partners, including the Halton Real Estate Forum and the Sheridan College international students welcome.

## **Investment Attraction**

**Digital Marketing:** Tactics undertaken in 2018 were focused on driving traffic to the new Invest Oakville website to grow digital audiences. In 2018, website traffic increased by 97%, with more than 90% of the traffic from new visitors to the site. The top pages viewed were: Data, Top Employers, and Developments & Zoning, which indicates that the website is being utilized successfully as an online business resource for investment attraction.

**Invest Oakville video:** An investment attraction video was launched in 2018 to market Oakville as the premier destination for business investment. The video was developed in partnership with the business community to showcase the town's incredible quality of life, and the talent driving innovation in business.

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The new video has been utilized by partners, translated into Mandarin for international business initiatives, and has more than 2,700 YouTube views.

**Opportunities & Investments Virtual Tour:** The virtual tour was created to provide an overview of new and ongoing economic development in Oakville. Using ArcGIS software, the interactive map takes users on a tour of development activity, infrastructure investment, and opportunities for business growth.

The town received an Award of Excellence from the Economic Developers Council of Ontario (EDCO) in the category of *Promotional Awards, Technology & New Media* for the virtual tour.

**Toronto Global:** The department continued work with Toronto Global in 2018 on foreign direct investment lead servicing. Together with Halton Region, Oakville submitted a site for Toronto Global's bid for the Amazon headquarters. The Toronto bid was considered in a shortlist of 20 potential sites in the second round of site selection.

**International Business:** In February a Chinese New Year reception was hosted in partnership with the Oakville Chinese Business Association and the Oakville Chinese Network. The event featured performances, music and a traditional Lion Dance, enjoyed by more than 600 guests.

As part of the Town's ongoing relationship with Pengzhou, two local artists participated in an international event and created art work to be exhibited in the Chinese city. A reception was held with Council upon their return.

## CORPORATE INITIATIVES

Staff led or participated in various corporate initiatives in 2018, including:

- **Municipal Accommodation Tax:** Staff led the external consultation and cross-departmental development and implementation of this new tax on local accommodations that will support the tourism industry.
- **One-Window for Filming:** Working with a cross-departmental team, a new web portal and on-line application were implemented for filming in Oakville. Further review and streamlining of payments, fees, and process will be undertaken in 2019.
- **Bronte Harbour Banquet and Conference Centre:** Staff engaged a consultant to undertake the analysis and provide recommendations for the future use of this facility.
- **Canadian Open Planning Committee:** Staff participated on the cross-departmental team for the planning of the Canadian Open at Glen Abbey Golf Club.

**CONSIDERATIONS:**

**(A) PUBLIC**

N/A

**(B) FINANCIAL**

There are no financial implications as this report provides an information report to Council.

**(C) IMPACT ON OTHER DEPARTMENTS & USERS**

There is no impact on other departments and users.

**(D) CORPORATE AND/OR DEPARTMENT STRATEGIC GOALS**

This report addresses the corporate strategic goal to:

- enhance our economic environment
- continuously improve our programs and services
- provide outstanding service to our residents and businesses
- be accountable in everything we do

**(E) COMMUNITY SUSTAINABILITY**

This report provides an update regarding the economic activity in Oakville and town initiatives that support economic sustainability.

**APPENDICES:**

Appendix A: Competitive Positioning

Prepared by:  
Amanda St. John  
Senior Economic Development Officer  
Economic Development

Recommended and submitted by:  
Dorothy St. George, MBA, EcD  
Director  
Economic Development

## Appendix A: Competitive Positioning

### 2018 Tax Rates

Tax rates across the Greater Toronto Area (GTA) decreased overall in 2018.

When compared to neighbouring Halton Region municipalities, Oakville's industrial and commercial property tax rates are more competitive than Burlington and Halton Hills.

Oakville's commercial tax rate is a differentiator for investment attraction. Of 18 municipalities reviewed, Oakville ranks fifth most competitive in the cost comparison.

The industrial tax rate is less competitive overall, ranking twelfth out of 18 municipalities assessed in the cost comparison. Although comparable to Halton Region municipalities, the industrial rate is less competitive than rates in Peel, Toronto, and York Region.

Municipality	Industrial Tax		Commercial Tax	
	Per cent (%)	Rank	Per cent (%)	Rank
<b>HALTON (Built Boundary)</b>				
Milton	2.49	11	1.61	1
Oakville	2.65	12	1.71	5
Burlington	2.77	13	1.78	8
Halton Hills	2.80	14	1.80	9
<b>PEEL</b>				
Caledon	2.24	8	1.92	11
Mississauga	2.22	7	1.98	12
Brampton	2.44	9	2.14	13
<b>TORONTO</b>				
Toronto	2.45	10	2.40	14
<b>YORK</b>				
Markham	1.87	1	1.61	2
Richmond Hill	1.91	2	1.64	3
Vaughan	1.93	3	1.65	4
Whitchurch- Stouffville	2.01	4	1.72	6
Aurora	2.07	5	1.77	7
Newmarket	2.13	6	1.82	10
<b>DURHAM</b>				
Ajax	3.48	15	2.50	15
Pickering	3.49	16	2.50	16
Whitby	3.55	17	2.54	17
Oshawa	4.04	18	2.87	18

Source: NRU 2018 GTHA Commercial & Industrial Property Tax Rates, August 2018. Numbers are rounded. Town of Oakville ranking from most (1) to least competitive (18) based on cost.

### 2018 Development Charges

Oakville's non-residential, non-retail development charges decreased from \$20.69 per sq. ft. in 2017, to \$20.34 per sq. ft. in 2018. Of the 18 municipalities assessed, Oakville is the only community to have decreased development charges in 2018, better positioning Oakville for investment.

Oakville's industrial development charges are higher than over half of the municipalities assessed, including those in Halton Region. The community ranks eleventh out of 18 in the cost comparison.

Oakville's commercial development charges are competitive across the GTA. In the cost comparison, the town ranks sixth out of 18, which has been identified as an important driver of office development in Oakville.

Municipality	Industrial Development Charge		Commercial Development Charge	
	\$ per sq. ft.	Rank	\$ per sq. ft.	Rank
<b>HALTON (Built Boundary)</b>				
Milton	\$13.61	3	\$13.61	1
Oakville	\$20.34	11	\$20.34	6
Burlington	\$17.87	7	\$17.87	3
Halton Hills	\$12.13	1	\$15.97	2
<b>PEEL</b>				
Caledon	\$17.80	6	\$24.27	11
Mississauga	\$22.24	12	\$30.53	17
Brampton	\$18.92	8	\$25.39	14
<b>TORONTO</b>				
Toronto	\$19.84	10	\$19.84	5
<b>YORK</b>				
Markham	\$33.15	18	\$33.15	18
Richmond Hill	\$29.01	17	\$29.01	16
Vaughan	\$24.30	15	\$24.30	12
Whitchurch- Stouffville	\$23.28	14	\$23.28	10
Aurora	\$22.99	13	\$22.99	9
Newmarket	\$28.32	16	\$28.32	15
<b>DURHAM</b>				
Ajax	\$16.39	5	\$24.90	13
Pickering	\$12.45	2	\$20.96	7
Whitby	\$16.23	4	\$19.10	4
Oshawa	\$19.74	9	\$22.73	8

Source: Municipal websites. Numbers are rounded. Town of Oakville ranking from most (1) to least competitive (18) based on cost.

### 2018 Industrial Land Values

Industrial land sale values in Oakville increased to an average of \$1.1 million per acre in 2018, up from \$900,000 in 2017. GTA land values continue to rise across the region, with Oakville land values comparatively more competitive than Mississauga, and consistent with values in neighbouring Halton Region municipalities.

Municipality	Average Land Price (\$000s/acre)	Rank
<b>HALTON</b>		
Halton Hills	\$865	6
Burlington	\$900	8
Milton	\$1,075	10
Oakville	\$1,100	11
<b>PEEL</b>		
Caledon	\$1,100	12
Mississauga	\$1,625	17
Brampton	\$1,710	18
<b>TORONTO</b>		
Toronto	\$1,250	13
<b>YORK</b>		
Aurora	\$950	9
Markham	\$1,400	15
Newmarket	\$900	7
Richmond Hill	\$1,400	14
Vaughan	\$1,500	16
Whitchurch-Stouffville	\$550	4
<b>DURHAM</b>		
Oshawa	\$350	1
Whitby	\$400	2
Ajax	\$500	3
Pickering	\$600	5

Source: CBRE Toronto Industrial Summary Q4 2018. Town of Oakville ranking from most (1) to least competitive (18) based on cost.