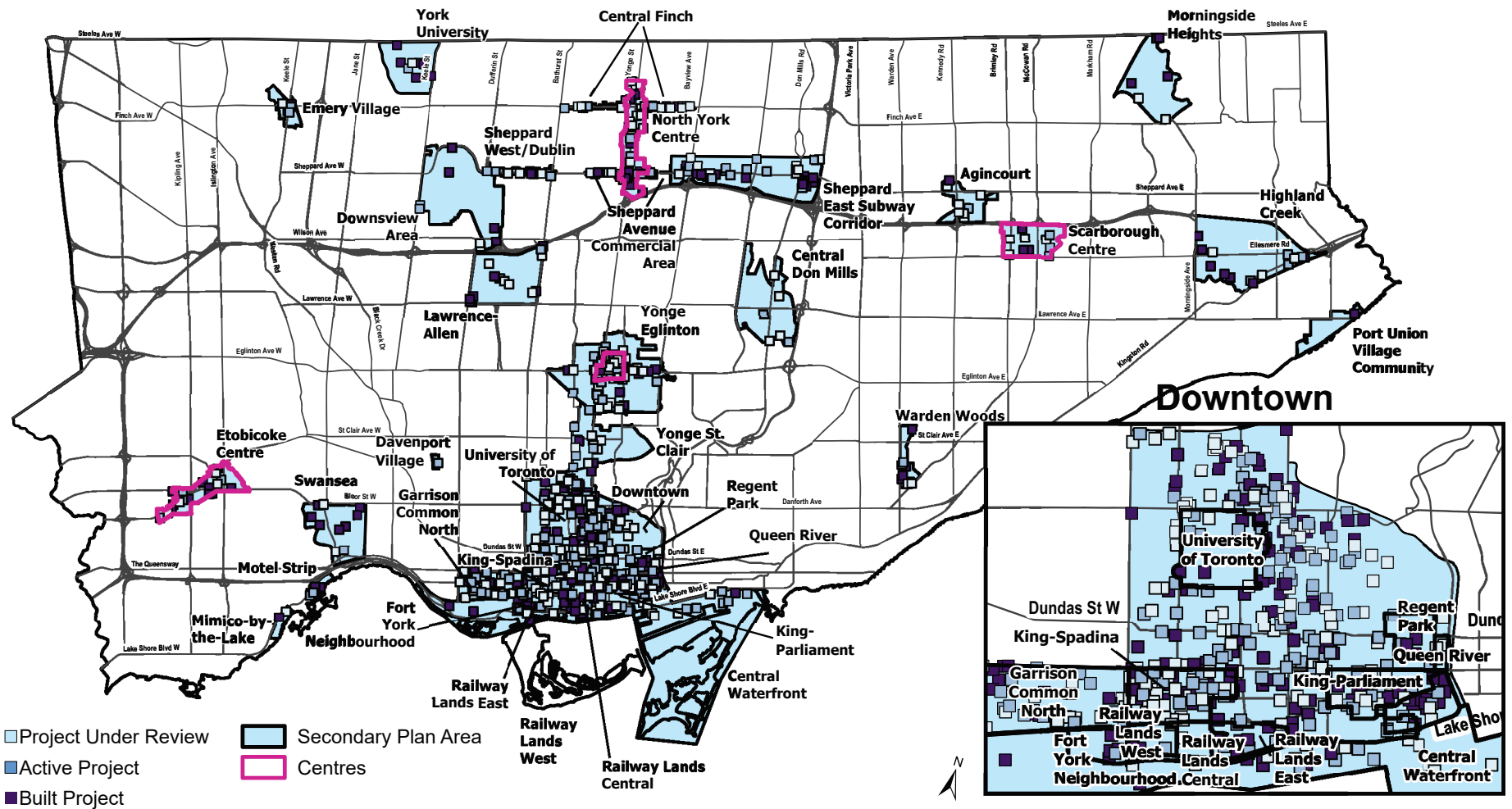


PH7.12 Attachment 1, Part 2

Map 6: Secondary Plan Areas



Source: Land Use Information System II

Development projects with activity between January 1, 2014 and December 31, 2018. Built projects are those which became ready for occupancy and/or were completed. Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal.

Prepared by: Toronto City Planning Division, Research and Information - June 2019

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Table 10a: Proposed Development by Secondary Plan Area

Geography	Number of Projects		Proposed Residential Units		Proposed Non-Residential GFA (m ²)	
		%		%		%
City of Toronto	2,192	100.0	397,327	100.0	11,156,126	100.0
Secondary Plans	857	39.1	255,699	64.4	5,834,628	52.3
Agincourt	10	1.2	10,789	4.2	81,539	1.4
Central Don Mills	6	0.7	2,375	0.9	38,336	0.7
Central Finch	23	2.7	485	0.2	2,484	0.0
Central Waterfront	52	6.1	25,036	9.8	845,559	14.5
Davenport Village	1	0.1	1,420	0.6	2,325	0.0
Downsview Area	8	0.9	1,380	0.5	63,579	1.1
Downtown Plan	436	50.9	142,473	55.7	4,264,232	73.1
Emery Village	5	0.6	1,686	0.7	3,247	0.1
Etobicoke Centre	20	2.3	8,295	3.2	32,185	0.6
Fort York Neighbourhood	7	0.8	2,606	1.0	27,812	0.5
Garrison Common North	42	4.9	10,365	4.1	250,604	4.3
King-Parliament	42	4.9	14,274	5.6	308,724	5.3
King-Spadina	84	9.8	26,534	10.4	637,388	10.9
Highland Creek	15	1.8	174	0.1	85,503	1.5
Lawrence-Allen	16	1.9	4,676	1.8	218,629	3.7
Mimico-by-the-Lake	2	0.2	373	0.1	3,704	0.1
Morningside Heights	7	0.8	90	0.0	52,007	0.9
Motel Strip	8	0.9	5,225	2.0	24,263	0.4
North York Centre	33	3.9	9,697	3.8	117,664	2.0
Port Union Village Community	1	0.1	101	0.0	0	0.0
Queen River	4	0.5	1,580	0.6	6,518	0.1
Railway Lands Central	3	0.4	4,123	1.6	170,116	2.9
Railway Lands East	9	1.1	2,049	0.8	575,964	9.9
Railway Lands West	4	0.5	1,932	0.8	19,460	0.3
Regent Park	7	0.8	5,966	2.3	21,586	0.4
Scarborough Centre	11	1.3	9,327	3.6	101,573	1.7
Sheppard Avenue Commercial Area	13	1.5	551	0.2	7,955	0.1
Sheppard East Subway Corridor	42	4.9	14,587	5.7	47,287	0.8
Sheppard West/Dublin	12	1.4	1,108	0.4	8,253	0.1
Swansea	10	1.2	759	0.3	8,941	0.2
University of Toronto	14	1.6	1,277	0.5	84,043	1.4
Warden Woods	10	1.2	834	0.3	14,659	0.3
Yonge-Eglinton ¹	81	9.5	22,453	8.8	187,555	3.2
Yonge St. Clair	18	2.1	2,529	1.0	24,161	0.4
York University	9	1.1	874	0.3	58,786	1.0

Source: City of Toronto, City Planning : Land Use Information System II.

Development projects with activity between January 1, 2014 and December 31, 2018. Built projects are those which became ready for occupancy and/or were completed. Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or those which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal.

Table Note A: The Centres boundaries on Map 2 of the Official Plan (Map 1 of this document) do not always correspond with the Secondary Plan boundaries on Map 35 of the Official Plan. The values in this table for the Secondary Plan projects with the same name as Centres may differ from Tables 1, 2, and 3 of this document.

Table Note B: The sum of each column may not add up to the totals of all the Secondary Plans because of the overlapping boundaries of various Secondary Plans. The same project may appear in more than one Secondary Plan.

Data Notes: 1: Revised Yonge Eglinton Secondary Plan geography shown on Map 6 has been approved by City Council and is currently awaiting a decision by the Minister of Municipal Affairs and Housing.

The King-Spadina Secondary Plan area continues to attract a significant amount of development activity in the current Pipeline with a proposed 26,534 residential units and 637,388 m² of non-residential GFA. The King-Spadina Secondary Plan area, which is located within *Downtown*, runs from Bathurst Street in the west to John Street and Simcoe Street in the east, and between Queen Street West in the north and Front Street West in the south. The major objectives of this Plan are to attract new investment with a mixture of compatible land uses, while recognizing the importance of maintaining employment uses and protecting heritage buildings.⁶

The Railway Lands East Secondary Plan has also undergone significant non-residential development with 575,964 m² of non-residential GFA proposed. The area for this Secondary Plan is located between John Street and Yonge Street, Front Street West, and the Gardiner Expressway. The Secondary Plan requires that new development be mixed-use and satisfy a broad range of commercial, residential, institutional, cultural, recreational, and open space needs.⁷

Secondary Plan Areas Outside Downtown and Central Waterfront

The newly adopted Yonge-Eglinton Secondary Plan area changes the previous Secondary Plan boundary, resulting in a 9% smaller geography.⁸ This Secondary Plan is under review by the Minister of Municipal Affairs and Housing, pursuant to Section 26 of the *Planning Act*. Despite this reduced area, the Yonge-Eglinton Secondary Plan contains the most development projects outside of the Downtown Plan area, accounting for 22,453 proposed residential units and 187,555 m² of non-residential GFA. The Yonge-Eglinton Secondary Plan area accounts for 9% of proposed residential units within all Secondary Plan areas.

The Garrison Common North Secondary Plan has successfully attracted a mix of residential and non-residential development, in accordance with one of the Plan's major objectives to include a variety of proposed land uses.⁹ The area, which includes Liberty Village and the Centre of Addiction and Mental Health (CAMH) Queen Street site, contains 4% of the proposed residential units and 4% of the proposed non-residential GFA in all Secondary Plan Areas.

The Sheppard East Subway Corridor Secondary Plan area has also attracted a significant amount of development with 14,587 residential units proposed. To a lesser extent, non-residential development is also occurring in this area.

The Etobicoke Centre Secondary Plan area is living up to its objective as the "urban focal point for the western part of the City."¹⁰ Etobicoke Centre has seen the most development out of all of the Secondary Plans in Etobicoke and York in terms of number of projects (20), number of proposed residential units (8,295), and amount of proposed non-residential GFA (32,185 m²). The City is currently reconstructing the Six Points intersection at Kipling, Dundas, and Bloor to support the development of Etobicoke Centre as a vibrant mixed-use transit-oriented community.¹¹ This new road reconfiguration will make new land available for a new civic centre, recreation centre, library, child care facility and private development. The Etobicoke Centre Secondary Plan area will continue to see future development activity as a result of this initiative.

Scarborough Community Council area has a large amount of non-residential development within a number of Secondary Plan areas.

Table 10b: Proposed Development in Secondary Plan Areas by Status

	Number of Projects	%	Proposed Residential Units	%	Proposed Non-Residential GFA (m ²)	%
City of Toronto	2,192	100.0	397,327	100.0	11,156,126	100.0
Secondary Plans	857	39.1	255,699	64.4	5,834,628	52.3
Built	292	34.1	64,998	25.4	1,485,195	25.5
Active (approved but not yet built)	275	32.1	90,092	35.2	1,896,075	32.5
Under Review (not approved)	290	33.8	100,609	39.3	2,453,359	42.0

Source: City of Toronto, City Planning : Land Use Information System II. Development projects with activity between January 1, 2014 and December 31, 2018. Built projects are those which became ready for occupancy and/or were completed. Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or those which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal.

In the Agincourt Secondary Plan area, two projects are proposing over 30,000 m² of commercial GFA each. The recently built Aquatic Centre for the Pan Am Games and a proposed student residence for the University of Toronto Scarborough are within the Highland Creek Secondary Plan area. The Scarborough Centre Secondary Plan area contains three projects proposing more than 20,000 m² of non-residential GFA each, including retail, office and transit uses. Lastly, the Morningside Heights Secondary Plan area has attracted a large project proposing nearly 30,000 m² of industrial uses.

These large projects show the importance of Secondary Plans in directing and managing non-residential growth throughout the city.

Employment Areas

What are Employment Areas?

Toronto's *Employment Areas* "are places of business and economic activity vital to Toronto's economy and future economic prospects".¹² In 2011, the City commenced its Municipal Comprehensive Review (MCR) of employment lands as required by the *Places to Grow Act*.¹³ The MCR concluded in 2013, with Council's adoption of Official Plan Amendment 231 (OPA 231)¹⁴ which received Ministerial approval in part (with minor modifications) in July 2014.

OPA 231 includes new policies for the City's economic health and lands designated as *Employment Areas*. OPA 231 was appealed to the Ontario Municipal Board (now the Local Planning Appeal Tribunal or LPAT) in 2014; some policies are still under appeal while others are in force and effect.

Development in Employment Areas

The Development Pipeline covers development activity during the years 2014 to 2018. Prior to June 2015, *Employment Districts* were part of Toronto's Urban Structure as described in Chapter 2 of the Official Plan. In June 2015, the Ontario Municipal Board approved portions of OPA 231, deleting the term *Employment Districts* within Chapter 2 and replacing it with the term *Employment Areas*. As such, this bulletin outlines development activity in the designated *Employment Areas*.

There is a long standing trend towards North American metropolitan areas losing

manufacturing activities to suburban locations over time.¹⁵ Likewise, employment in the manufacturing sector in Toronto had been decreasing almost every year since 1983, declining from 22% to 9% of all jobs in 2016.¹⁶ However, the Toronto Employment Survey has reported increases in manufacturing employment over the last two years, adding 11,720 jobs and growing by 9.5%. In 2018, the manufacturing sector accounted for 21% of all the jobs in the *Employment Areas* and 93% of manufacturing jobs in the city were located in *Employment Areas*.¹⁷ At the same time, Toronto's employment activity in *Employment Areas* has grown and diversified.

Table 11: Proposed Development in Employment Areas by Status

	Projects		Proposed Non-Residential Gross Floor Area		
	Number	Percent	Number	Percent	
City of Toronto	2,192		11,156,126	100.0	
Total Employment Areas	295	100.0	3,482,999	31.2	100.0
Built	106	35.9	524,934		15.1
Active	106	35.9	1,736,824		49.9
Under Review	83	28.1	1,221,241		35.1
Within Employment Lands	295	100.0	3,482,999	100.0	
Core Employment Areas	156	52.9	1,388,757	39.9	100.0
Built	45	28.8	234,698		16.9
Active	61	39.1	508,990		36.7
Under Review	50	32.1	645,069		46.4
General Employment Areas	139	47.1	2,094,242	60.1	100.0
Built	61	43.9	290,236		13.9
Active	45	32.4	1,227,834		58.6
Under Review	33	23.7	576,172		27.5

Source: City of Toronto, City Planning : Land Use Information System II.

Development projects with activity between January 1, 2014 and December 31, 2018. Built projects are those which became ready for occupancy and/or were completed. Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or those which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal. Gross floor area values are expressed in square metres.

Note: This table cannot be directly compared with Tables 1, 2, and 3 because the designated Employment Areas exist in Downtown, and because some projects' site areas may fall partially within Employment Areas and partially in another Growth Area boundary.

Employment Areas are attractive locations incubating emerging businesses, accommodating 29% of new establishments in 2018.¹⁸ With 1.72 million jobs forecasted for Toronto by 2041,¹⁹ the protection and enhancement of *Employment Areas* is vital to the city's economic health.

Between 2014 and 2018, *Employment Areas* contained 3.5 million m² or 31% of the city's proposed non-residential GFA (see Table 11 and Maps 7 and 8 on pages 22 and 23). By 2018 year-end, 36% of these projects had been built, which amounts to 524,934 m² of new non-residential floor space in 106 different projects.

As development progresses on projects that have been approved, another 1.7 million m² of non-residential GFA in 106 projects is expected to be constructed in *Employment Areas*. A further 83 projects with 1.2 million m² of non-residential GFA is under review and may eventually be approved and constructed in *Employment Areas*.

If non-residential development in *Employment Areas* is added to the development in the *Downtown, Centres, Avenues, and Other*

Mixed Use Areas, the percentage of non-residential development occurring in an area targeted for growth rises to 90%. If Secondary Plan Areas are included, the percentage of non-residential development occurring in an area targeted for growth rises to 94%.

Core Employment Areas and General Employment Areas

In December 2016, the Ontario Municipal Board issued a partial approval of OPA 231, bringing into effect the *Core Employment Area* and *General Employment Area* land use designations. *Core Employment Areas* are, for the most part, geographically located within the interior of *Employment Areas*. Uses that would attract the public into the interior of employment related lands and possibly disrupt industrial operations are not generally permitted in the *Core Employment Areas*. This separation prioritizes goods movement within *Core Employment Areas* and provides operating businesses certainty as to their surrounding uses. Uses permitted in *Core Employment Areas* are all types of manufacturing, processing, warehousing, wholesaling, distribution, storage, transportation facilities, vehicle repair and

services, offices, research and development facilities, utilities, waste management systems, industrial trade schools, media, information and technology facilities, and vertical agriculture.

General Employment Areas are usually located on the periphery of *Employment Areas* on major roads where retail stores, service shops, and restaurants can serve workers in the *Employment Areas* and would also benefit from visibility and transit access to draw the broader public. Uses permitted in *General Employment Areas* include all those permitted in *Core Employment Areas*, as well as restaurants, retail, and service uses.²⁰

In *Core Employment Areas*, the non-residential GFA proposed between 2014 and 2018 is increasing in size when comparing built to active and active to under review projects. This indicates a growing development interest and investment in these areas. In the *General Employment Areas*, the largest amount of proposed non-residential GFA is in active projects, largely due to the East Harbour development at 21 Don Valley Parkway. There are more built projects in these areas than active projects, and more active projects than under review projects.

The Official Plan permits large format retail uses in *General Employment Areas*, while only ancillary retail is permitted within *Core Employment Areas*. These permissions support the development of a buffer between potentially impactful operations in *Core Employment Areas* and nearby land use designations that permit sensitive uses, including residential. The majority of retail GFA proposed for *Employment Areas* is concentrated in *General Employment Areas*.

Employment Areas continue to provide an attractive location for

Table 12: Proposed Industrial GFA in Employment Areas

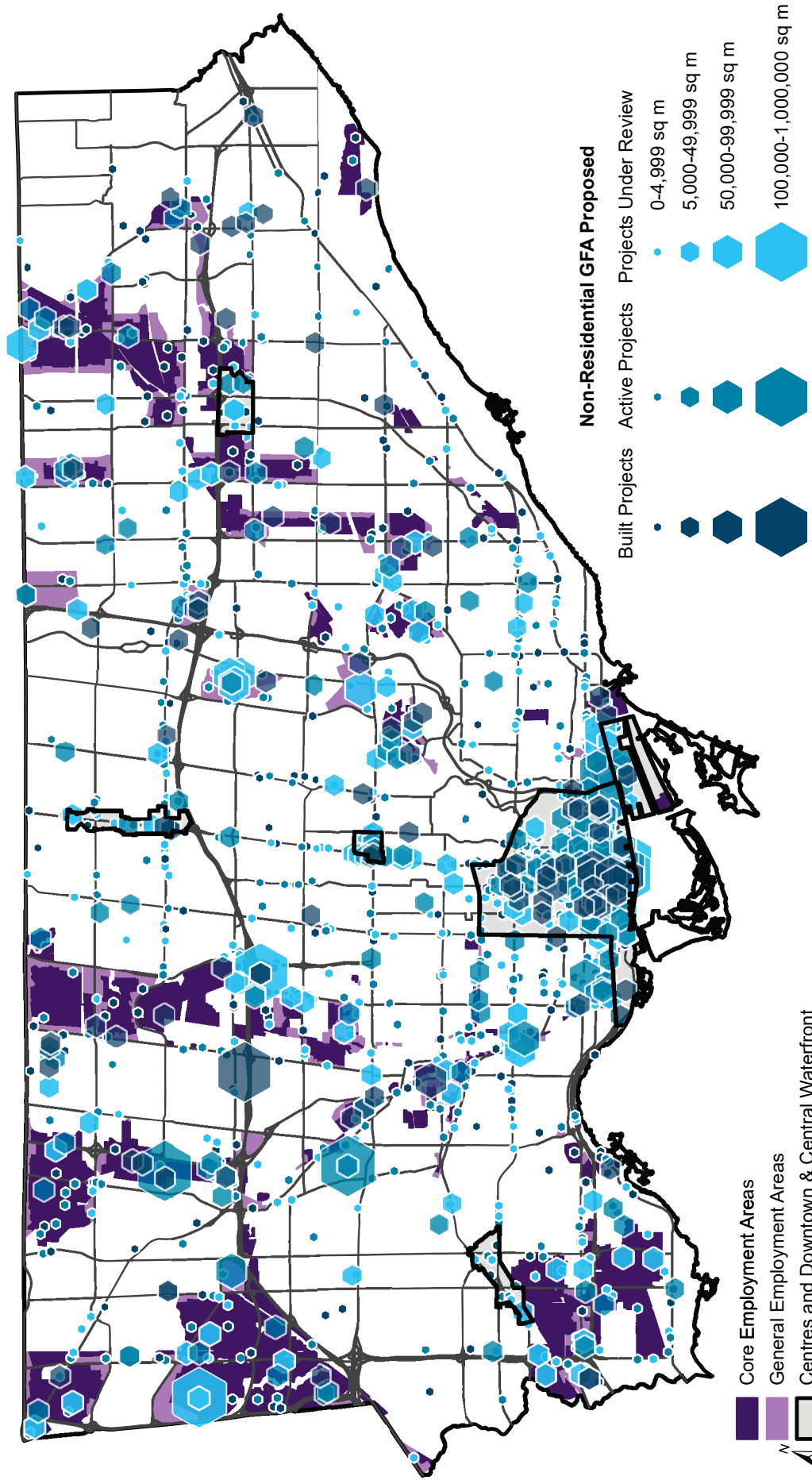
Area	Built	Active	Under Review	Total in Pipeline	% of Total
City of Toronto	210,780	416,726	425,555	1,053,061	100.0
Employment Areas	155,832	373,467	342,228	871,527	82.8
Core Employment	143,114	335,124	225,099	703,337	80.7
General Employment	12,718	38,343	117,129	168,190	19.3

Source: City of Toronto, City Planning : Land Use Information System II.

Development projects with activity between January 1, 2014 and December 31, 2018. Built projects are those which became ready for occupancy and/or were completed. Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or those which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal. Gross floor area values are expressed in square metres.

Note: This table cannot be directly compared with Tables 1, 2, and 3 because the designated Employment Areas exist in Downtown, and because some projects' site areas may fall partially within Employment Areas and partially in another Growth Area boundary.

Map 7: Proposed Non Residential Development



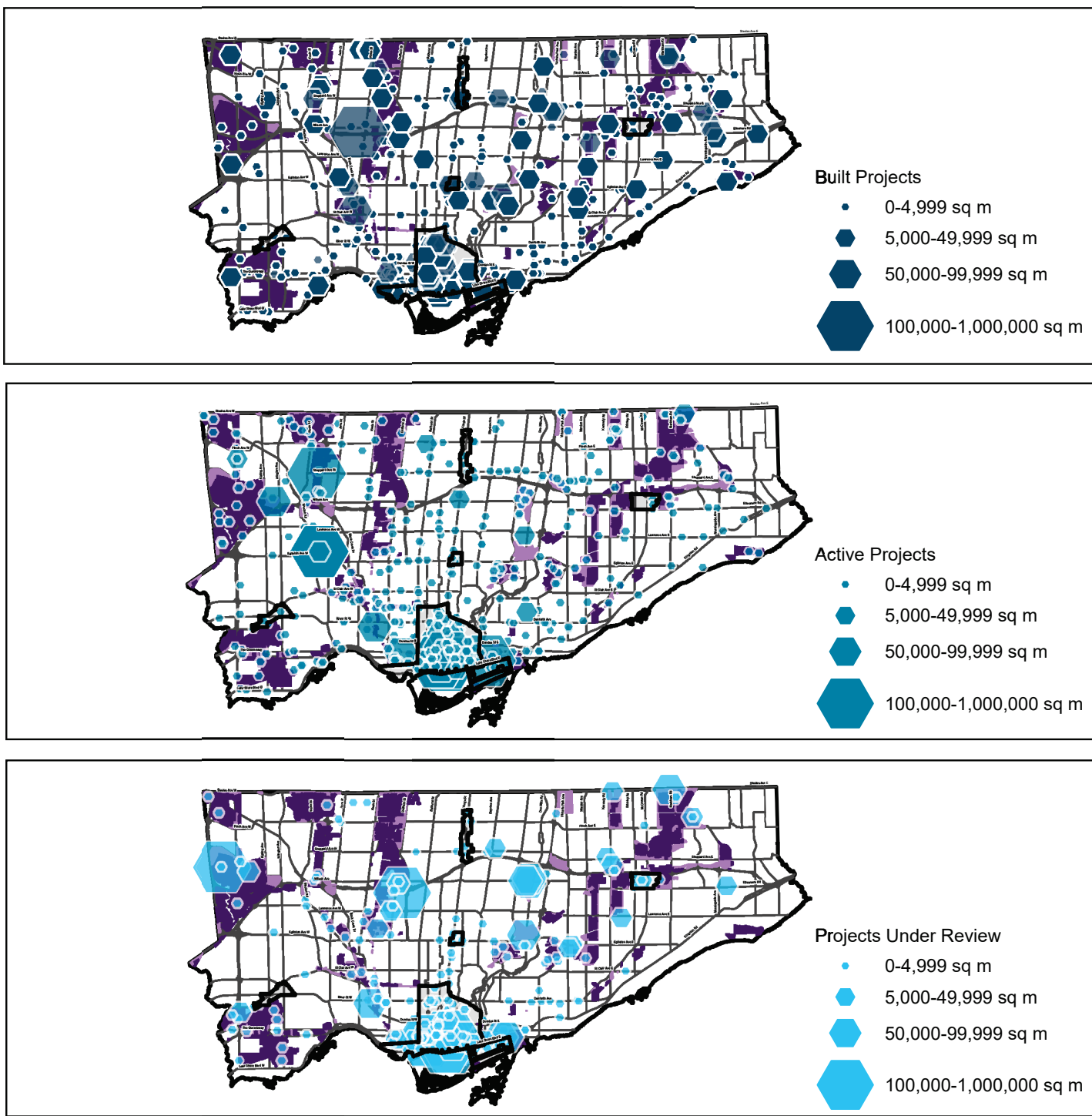
Source: Land Use Information System II

Development projects with activity between January 1, 2014 and December 31, 2018. Built projects are those which became ready for occupancy and/or were completed. Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal.

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Map 8: Proposed Non Residential Development by Status



Source: Land Use Information System II

Development projects with activity between January 1, 2014 and December 31, 2018. Built projects are those which became ready for occupancy and/or were completed. Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal.

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Core Employment Areas
General Employment Areas
Centres and Downtown & Central Waterfront

projects, in particular those that include industrial GFA. The current Pipeline contains 1.1 million m² of proposed new industrial GFA, 83% of which is located in the *Employment Areas* (see Table 12 on page 21). The majority of the industrial GFA, 81%, is proposed in *Core Employment Areas* while 19% is proposed in *General Employment Areas*.

In *Core Employment Areas*, over half of all proposed GFA is industrial, totalling 703,337 m² (see Tables 11 and 12). About 80% of all GFA built in *Core Employment Areas* over the last five years is industrial, accounting for 143,114 m² of GFA. An additional 225,099 m² of proposed industrial GFA in *Core Employment Areas* is under review.

Toronto's Non-Residential Market

The city's non-residential market remains strong, mainly consisting of office space but also including other uses such as retail, institutional and hotels. There was 888,118 m² constructed in projects larger than 50,000 m² (see Table 9). All of these projects were built and ready for occupancy before 2019.

The trend toward significant office construction is continuing. There is more than double the active non-residential development proposed than what was built in the last five years. The fact that applicants are pursuing large new projects as others are being completed points to a continuing demand for non-residential space in the city generally and in *Downtown*.

A number of large non-residential projects are active or under review. Table 9 breaks down the largest proposed non-residential projects by status and location.

Five Largest Active Projects

- East Harbour at 21 Don Valley Parkway, which proposes to

redevelop the Unilever site into a major retail, office, and transportation hub;

- 82 Buttonwood Avenue, a redevelopment of West Park Health Care Centre and other institutional uses;
- 45 Bay Street, which includes a major office tower, an elevated park over a rail corridor and the GO bus terminal integrated into the project;
- 141 Bay Street, the second phase of the development at 45 Bay St, proposing a 53-storey office tower and;
- 156 Front Street West, a 46-storey office tower.

Five Largest Under Review Projects

- 25 King Street West, 64-storey office building and addition to Hotel Victoria;
- 3401 Dufferin Street, a 20+ year phased mixed use plan for the Yorkdale Shopping Centre site which includes retail, office, hotel and residential uses;
- 433 Front Street West, development of eight mixed-use buildings over a rail corridor;
- 440 Front Street West, "The Well", is a redevelopment of the Globe and Mail site with seven mixed use buildings including office and retail uses and;²¹
- 1 Yonge Street, which retains the existing Toronto Star office building and adds several mixed-use towers.²²

Downtown accounts for 91% of the office space currently under construction in the GTA.^{23,24} Outside of the *Downtown*, the bulk of office space construction is occurring beyond the City of Toronto boundaries within Vaughan, Mississauga, Oakville, and Burlington.²⁵

The City of Toronto and the Provincial Growth Plan

Citywide Growth Plan Forecast

It is important to understand Toronto's growth in the context of its population and employment. *A Place to Grow: Growth Plan for the Greater Golden Horseshoe* (2019) was brought into effect on May 16, 2019 by the Province.²⁶ It manages growth and development throughout the region that stretches around Lake Ontario from Niagara Falls to Peterborough, with Toronto at its centre. The 2019 Growth Plan forecasts 3.40 million people and 1.72 million jobs in Toronto by 2041. Currently, Toronto's population is on track with the Growth Plan's population forecasts.

The Growth Plan forecasts are based on a background study about forecasts by Hemson Consulting Ltd. in 2012. They are the basis of the forecasts for 2031 to 2041 in Schedule 3 of the 2006 Growth Plan as amended in 2013, and in the 2017 Growth Plan, as well as the 2019 Growth Plan. These forecasts anticipate a 2016 population of 2,865,000 people (including Census undercoverage), and if interpolated to 2018, an anticipated 2018 population of 2,909,000.

On March 28th, 2019, Statistics Canada released their latest population estimates, estimating Toronto's population in 2018 to be 2,956,024 people,²⁷ exceeding the anticipated population by 47,024 people. The City of Toronto's growth is firmly on track with the forecasts supporting the Growth Plan, if not slightly ahead.

Statistics Canada's latest estimates show that Toronto's population is growing at an accelerating rate as 2017 and 2018 represent the largest increases in population over the last decade. Statistics Canada

estimates that the city grew by 77,455 people or 2.7% over 2017. As a comparison, the growth rate between the census years of 2011 and 2016 was 4.5% while the estimated growth over the last five years of 2013 to 2018 was 7.3%.

Employment Forecast

Each year for the past 36 years, the City Planning Division has conducted the Toronto Employment Survey, collecting employment information from every business establishment in the city. There were 75,680 business establishments counted in 2018. The Toronto Employment Survey does not capture the growing number of people who work at home, nor all of those who do not have usual places of work, such as construction workers. Thus, the total employment in the city is higher than reported by the Survey.

According to the forecasts supporting the Growth Plan, Toronto will need to add approximately 6,670 new jobs each year between 2011 and 2041 to reach the Growth Plan forecast.²⁸ According to the results of the 2018 Toronto Employment Survey, the city grew at an average rate of 13,158 jobs over the past 17 years since 2001, more than double the rate anticipated by the Growth Plan. This has risen to 22,999 jobs per annum over the past decade, more than triple the Growth Plan rate. If these rates were to continue, these trends would be more than sufficient to achieve the Growth Plan forecast. In other words, Toronto would achieve the employment forecast well before 2041.

Housing Forecast

Toronto's housing growth is also on track with the household forecasts supporting the Growth Plan 2017. The forecasts supporting the Provincial Growth Plan anticipate that the city needs to

accommodate 399,270 households between 2001 and 2041.²⁹ Canada Mortgage and Housing Corporation reported that 242,081 residential units were built from 2002 to 2018.³⁰ This is 61% of the units required to accommodate the forecasted growth.

The Development Pipeline contains 2,192 development proposals received by the City representing 397,327 residential units. Of these, 140,441 units are in active projects, those that have received at least their first Planning approval but are not yet built. This represents a further 35% of the required units (see Table 13). Together, the units built from 2002 to 2018 and those units approved but not yet built total 382,522 units. This figure is 96% of the units required to accommodate the household growth to 2041 anticipated by the forecasts supporting the Growth Plan at just 17 years into the forty-year forecast period (see Figure 5 on page 26).

Not all development proposals are approved. However, if the proposals in the Development Pipeline which are still under

review are included, the total potential housing rises to 549,831 units or 138% of the forecasted household demand. This indicates that the city already has more than sufficient potential housing to accommodate the forecasted growth to 2041.

Some units are demolished to realize the new housing. A previous Development Charges Background Study used a demolition rate of 10% to estimate the net new residential units added to the housing stock. Taking this into account, a net total of 217,873 units were completed with a further 126,397 net new units approved but not yet constructed. Combined, this totals 344,270 units or 86% of the units needed to accommodate the forecasted household growth to 2041. Including the proposals in the Development Pipeline still under review, the total net potential housing is 494,848 units, a surplus of 95,578 units or 24% above the forecasts supporting the Growth Plan.

Not all submitted proposals are approved, and not all approved projects are built. However, given these current trends, Toronto is

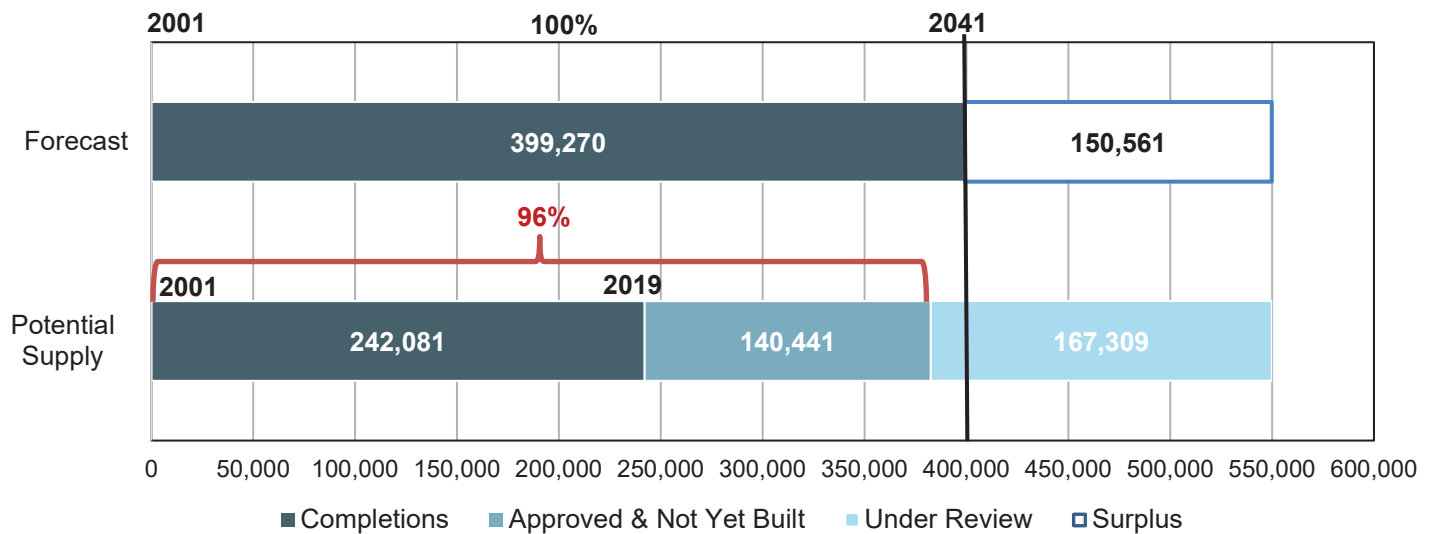
Table 13: Growth Plan Forecasts

	Potential Supply (Units)	%	Potential Supply Less Estimated Demolitions	%
Hemson Forecast to 2041	399,270	100.0	399,270	100.0
Completions 2002 - 2018	242,081	60.6	217,873	54.6
Active 2014-2018	140,441	35.2	126,397	31.7
Under Review 2014-2018	167,309	41.9	150,578	37.7
Total	549,831	137.7	494,848	123.9
Additional Potential Housing	150,561	37.7	95,578	23.9

Source: City of Toronto, City Planning: Land Use Information System II. Hemson Consulting Ltd, Greater Golden Horseshoe Growth Forecasts to 2041, Technical Report, November 2012. CMHC, *Housing Now Tables: Greater Toronto Area*.

Development projects with activity between January 1, 2014 and December 31, 2018. Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or those which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal.

Figure 5: Growth Plan Forecasts



Source: City of Toronto, City Planning : Land Use Information System II.

Development projects with activity between January 1, 2014 and December 31, 2018. Built projects are those which became ready for occupancy and/or were completed. Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or those which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal.

well on its way to housing the population forecasted by the *Growth Plan* to 2041.

Density of Jobs and People in Growth Areas

Toronto’s Official Plan seeks to direct growth to the *Centres* and *Downtown* “in order to promote mixed use development to increase opportunities for living close to work and to encourage walking and cycling for local trips.”³¹

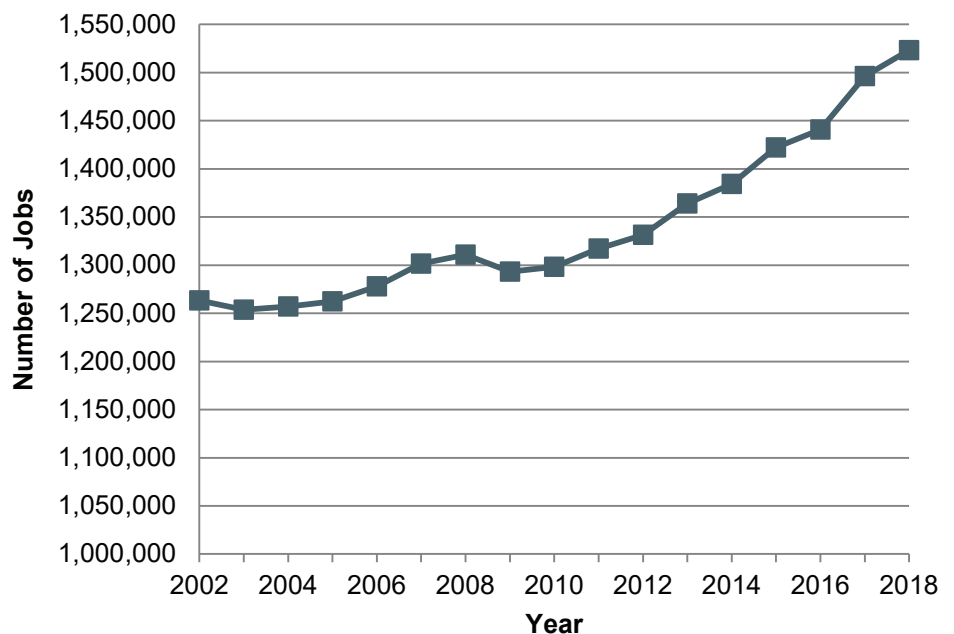
The Provincial Growth Plan sets minimum gross density targets to be achieved by 2031 for *Urban Growth Centres* (UGCs). The minimum gross density target is 400 residents and jobs combined per hectare for each *Centre* and for *Downtown*.

Table 14 (on page 27) shows the density of people and jobs per hectare for *Downtown* and each *Centre* between 2006 and 2016, and for the city overall. Since 2006, each of these areas has become steadily more dense. *North York Centre* and *Yonge-Eglinton Centre* have achieved the 400 people and jobs per hectare target, as early as

2006 in the case of *Yonge-Eglinton Centre*. These *Centres* have continued to become more dense since reaching their targets. Table 14 also shows that *Downtown* and the *Centres* have intensified in comparison to the city overall, as the *Growth Plan* has directed.

If the density trends continue, it is likely that *Downtown* will exceed the UGC density target well before 2031. The 2016 density of the *Downtown* UGC area is 354 people and jobs per hectare. According to the Census, the *Downtown* UGC population increased by 41,668 people

Figure 6: City of Toronto Employment



Source: Toronto City Planning, Toronto Employment Survey

Table 14: Density of People and Jobs Per Hectare in Urban Growth Centres

Measure	Density (People and Jobs Per Hectare)			Percent Change in Density	
	Year	2006	2011	2016	2006-2016
Scenario	Actual	Actual	Actual	Population Change	
City of Toronto	60	62	66	11%	
Urban Growth Centres					
Downtown and Central Waterfront Centres	265	302	354	34%	
Etobicoke Centre	137	144	151	11%	
North York Centre	385	455	480	25%	
Scarborough Centre	138	156	172	25%	
Yonge-Eglinton Centre	482	570	604	25%	

Sources: City Planning, Land Use Information System II. City of Toronto, City Planning, Toronto Employment Surveys 2006, 2011, 2016. Statistics Canada, 2006, 2011, and 2016 Censuses. Custom tabulation. 2006, 2011 and 2016 numbers were calculated based on employment values from the Toronto Employment Survey and population values from the Census.

between 2011 and 2016. According to the City’s Toronto Employment Survey, the employment increased by 69,280 jobs between 2011 and 2016 (see Figure 6 on page 26).³² The increase in density as a result of this growth is an additional 52 people and jobs per hectare over the 2011-2016 period. This demonstrated both the growth in population and employment, and the corresponding growth in density of the UGC.

The 2016 Q4 Pipeline contained 42,556 residential units in projects within the *Downtown* UGC that were built between 2012 and 2016. This area also contained a further 45,236 units in projects which were active.³³ The number of units in active projects is greater than the number of units that were built between 2012 and 2016. If a similar number of units in active projects were realized between 2016 and 2021 as were built between 2011 and 2016 with the same population and employment growth, the *Downtown* UGC would increase by an additional 110,948

people and jobs. The resulting density would be an additional 52 people and jobs per hectare for a total of 406 people and jobs per hectare. Thus if the current trends continued for another five years, the resulting density of the *Downtown* UGC would achieve the minimum *Urban Growth Centre* density target well before 2031.

How the Data is Collected

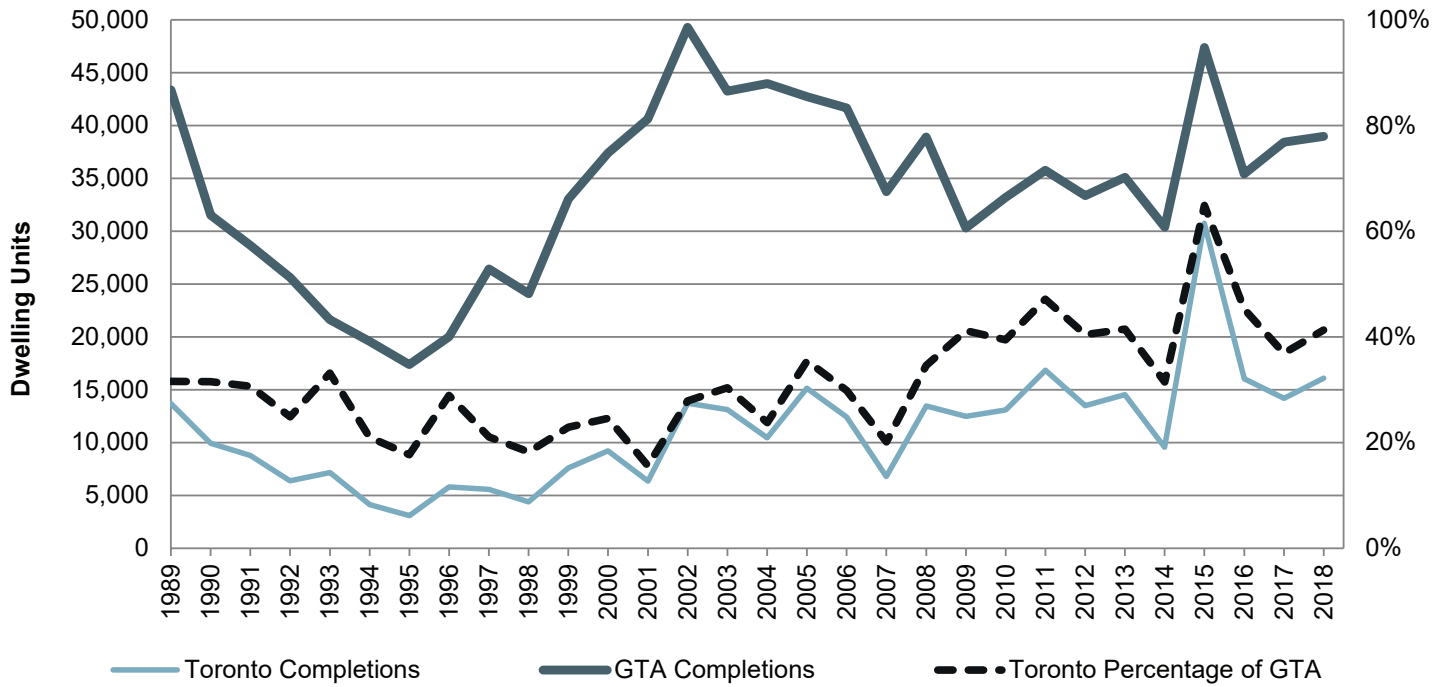
The development information presented in this bulletin was extracted from Land Use Information System II, maintained by the City’s Research and Information unit, Strategic Initiatives, Policy & Analysis section of the City Planning Division. Staff collect detailed information from every development application received by the Division, as well as any revisions to the applications made throughout the planning process. Information is also collected from building permit applications. The result is a rich body of data describing the location, size and built form of development projects across the city of Toronto throughout each stage of development.

Endnotes

- 1 For the purposes of this bulletin, any reference to *Downtown* includes the *Central Waterfront Area* unless otherwise specified.
- 2 The Official Plan states “*Employment Areas* are places of business and economic activities vital to Toronto’s economy and future economic prospects.” The policies for *Employment Areas* were replaced by new policies as part of the Municipal Comprehensive Review of employment lands. These new policies are currently under partial appeal at the Local Planning Appeal Tribunal (LPAT). For more information on the status of the appeals and to access interim Board Orders, please visit the LPAT’s website: <https://www.omb.gov.on.ca/ecs/CaseDetail.aspx?n=PL140860>.
- 3 Canada Mortgage and Housing Corporation, *Housing Now – Greater Toronto Area Reports*.
- 4 City Council enacted a bylaw to adopt the Downtown Plan Official Plan Amendment on July 27, 2018. OPA 406 includes amendments to Section 2.2.1 and Map 6 of the Toronto Official Plan, a new Downtown and future updates to the existing planning framework for Downtown. Accompanying infrastructure strategies are also available. OPA 406 has been submitted to the Ministry of Municipal Affairs and Housing for review and approval pursuant to Section 26 of the Planning Act. More information about the Downtown Plan is available at www.toronto.ca/tocore.
- 5 City of Toronto, City Planning, Official Plan, Downtown Plan Secondary Plan, Policy 2, 2018. <https://www.toronto.ca/wp-content/uploads/2018/08/966f-city-planning-to-core-opa406-attachment-1-schedule-5-downtown-plan.pdf>
- 6 City of Toronto, City Planning, Official Plan, King-Spadina Secondary Plan, Policy 2, 2006.
- 7 City of Toronto, City Planning, Official Plan, Railway Lands East Secondary Plan, Policy 2, 2006.
- 8 City Council adopted the Yonge-Eglinton Official Plan Amendment (OPA 405) with amendments on July 23-27, 2018. City Council also endorsed a Parks and Public Realm Plan and Community Services and Facilities Strategy for Midtown. OPA 405 has been submitted to the Ministry of Municipal Affairs and Housing for review and approval pursuant to Section 26 of the Planning Act. More information about the Downtown Plan is available at www.toronto.ca/planning/yongeeglinton.
- 9 City of Toronto, City Planning, Official Plan, Garrison Common North Secondary Plan, Policy 2.1(c), 2006.
- 10 City of Toronto, City Planning, Official Plan, Etobicoke Centre Secondary Plan, 2006.
- 11 City of Toronto, City Planning, *Six Points Interchange Reconfiguration Common Questions*. <https://www.toronto.ca/community-people/get-involved/public-consultations/infrastructure-projects/etobicokecentre/common-questions/>.
- 12 Toronto City Council adopted Official Plan Amendment (OPA) 231 on December 18, 2013 which contains new economic policies and new policies and designations for *Employment Areas*. See City of Toronto, By-Law No. 1714-2013. Updated to Board order issued December 20, 2016, <https://www.toronto.ca/legdocs/bylaws/2013/law1714.pdf>
- 13 Ontario Ministry of Infrastructure, *Growth Plan for the Greater Golden Horseshoe, 2006: Office Consolidation, June 2013, Policy 2.2.6.5*.
- 14 For more information about OPA 231, please visit <http://www.toronto.ca/opreview>.
- 15 Kneebone, Elizabeth (2013) *Job Sprawl Stalls: The Great Recession and Metropolitan Employment Location*, Brookings Institution.
- 16 City of Toronto, City Planning, *Toronto Employment Survey, 2016*.
- 17 City of Toronto, City Planning, *Profile Toronto: Toronto Employment Survey, 2018*.
- 18 City of Toronto, City Planning, *Profile Toronto: Toronto Employment Survey, 2018*.
- 19 The Official Plan (2006) was adopted before the Growth Plan came into force. By provincial legislation, the Official Plan must be brought into conformity with the policies of the Growth Plan. The City has brought the Official Plan into conformity with the Growth Plan through a series of Official Plan Amendments. Toronto’s Official Plan contemplates the city having 3.19 million people and 1.66 million jobs by 2031. The 2006 Growth Plan forecasts 3.08 million people and 1.64 million jobs in the city of Toronto by 2031. The amended Growth Plan, including revised forecasts, came into effect in June 2013. Official Plan Amendment (OPA) 231 amended this forecast and this policy is in effect. See: <https://www.toronto.ca/legdocs/bylaws/2013/law1714.pdf>.
- 20 City of Toronto, By-Law No. 1714-2013. Updated to Board

- order issued December 20, 2016. See: <https://www.toronto.ca/legdocs/bylaws/2013/law1714.pdf>. The permission for all types of retail uses in *General Employment Areas* is under appeal.
- 21 The project at 440 Front Street West was approved after the current Development Pipeline was created.
- 22 The project at 1 Yonge Street was approved after the current Development Pipeline was created.
- 23 'Downtown' as defined by CBRE in CBRE Marketview, Toronto Office, Q4 2018 does not correlate to the geography of the *Downtown and Central Waterfront* as defined by the City of Toronto's Official Plan.
- 24 CBRE Marketview, Toronto Office, Q4 2018.
- 25 CBRE Marketview, Toronto Office, Q4 2018.
- 26 *A Place to Grow: Growth Plan for the Greater Golden Horseshoe*. May 16, 2019, <https://www.ontario.ca/document/place-grow-growth-plan-greater-golden-horseshoe>.
- 27 Statistics Canada, Annual Demographic Estimates, 91-214-X.
- 28 Hemson Consulting Ltd, *Greater Golden Horseshoe Growth Forecasts to 2041*, Technical Report, 2012.
- 29 Hemson Consulting Ltd, *Greater Golden Horseshoe Growth Forecasts to 2041*, Technical Report, 2012.
- 30 Canada Mortgage and Housing Corporation, *Housing Now – Greater Toronto Area Reports*.
- 31 City of Toronto, City Planning, Official Plan, p. 2-5, Policy 2d, 2006.
- 32 City of Toronto, Toronto Employment Survey Bulletin, 2016.
- 33 Profile Toronto: *How Does the City Grow?* April 2017, Table 4, page 7 presented to Planning and Growth Management Committee on May 31, 2017. See: <https://www.toronto.ca/legdocs/mmis/2017/pg/bgrd/backgroundfile-103953.pdf> and <http://app.toronto.ca/tmmis/viewAgendaItemHistory.do?item=2017.PG21.2>

Appendix Figure 7: Toronto & GTA Dwelling Unit Completions



Source: Canada Mortgage and Housing Corporation, *Housing Now - Ontario Reports*

Appendix Table 15: Dwelling Unit Completions and Absorptions by Type, City of Toronto

Freeholds

	Completions	Absorptions	Net Completions	"Unabsorbed" Percentage
2014	1,583	1,525	58	3.8
2015	1,374	1,342	32	2.4
2016	1,513	1,464	49	3.3
2017	1,849	1,813	36	2.0
2018	1,807	1,797	10	0.6
Total	4,470	4,331	139	3.2

Condominiums

	Completions	Absorptions	Net Completions	"Unabsorbed" Percentage
2014	7,777	7,900	-123	-1.6
2015	28,013	27,082	931	3.4
2016	13,426	14,137	-711	-5.0
2017	11,507	12,257	-750	-6.1
2018	12,257	11,947	310	2.6
Total	72,980	73,323	-343	-0.5

Purpose-Built Rental

	Completions	Absorptions	Net Completions	"Unabsorbed" Percentage
2014	191	195	-4	-2.1
2015	1,362	1,027	335	32.6
2016	1,088	1,028	60	5.8
2017	815	595	220	37.0
2018	2,567	2,111	456	21.6
Total	6,023	4,956	1,067	21.5

Source: Canada Mortgage Housing Corporation, Market Absorption Survey Custom Tabulation.

Note 1. The data in Appendix Table 1 reflects the total number of units for each 12 month period. Due to cyclical variations in the construction and sales industry that are unequally distributed throughout the year 2019 year-to-date data has been excluded.

Note 2. "Unabsorbed Percentage" is the ratio of Completions minus Absorptions to Absorptions.

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