

This bulletin illustrates how the city has developed and how it will continue to grow over time. It provides an overview of all development projects with approval or construction activity between January 1, 2016 and December 31, 2020. Special topics include the City's pandemic response, the Growth Plan forecasts, and land use planning and heritage conservation working together. Available from <https://www.toronto.ca/city-government/data-research-maps/research-reports/planning-development/>



Development Pipeline 2021

Highlights

503,362 residential units and 12,853,823 square metres of non-residential gross floor area (GFA) were proposed, representing all projects with development activity between January 1, 2016 and December 31, 2020

There are 68,293 more residential units and 768,675 square metres more non-residential GFA in this pipeline compared to the 2019 Q4 pipeline

93,836 new residential units were constructed between 2016 and 2020

162,757 residential units and 5,561,590 square metres of non-residential GFA are in active projects that have received at least one Planning approval but have not yet been built

86% of new residential development is proposed in areas targeted for growth by the City's Official Plan

90% of new non-residential development is proposed in areas targeted for growth by the City's Official Plan including Employment Areas

The Downtown and Central Waterfront area is the main location for proposed residential development with 32% of the residential units and 38% of the non-residential GFA proposed in the city

Secondary Plan areas contain proposals for 60% of the residential units and 59% of the non-residential GFA proposed citywide

Introduction

Toronto is Canada's most populous city and the focal point of development and growth for the Greater Toronto Area (GTA). For many years now, Toronto has experienced a surge of both residential and non-residential development. This annual bulletin examines how and where the city has been growing over the past five years, and how it will continue to develop in the near future.

Toronto's Official Plan came into force in June 2006 and has subsequently undergone a number of thematic amendments to bring it into conformity with the Growth Plan and the Provincial Policy Statement. The Official Plan is the guide for development in the city over the next 30 years. While gradual intensification occurs across the city, its central purpose is to direct growth to appropriate areas and away from the city's stable residential neighbourhoods and green spaces. The locations recognized as being most appropriate for residential and employment growth are those identified in the Official Plan's Urban Structure Map as Avenues, Centres and Downtown¹, as well as other areas in the city designated as *Mixed Use Areas* and Employment Areas.² These appropriate areas are also those that are well integrated and serviced by infrastructure, transit and other community services and facilities. The Official Plan's Urban Structure Map is included in this bulletin as Map 1 on page 2. The

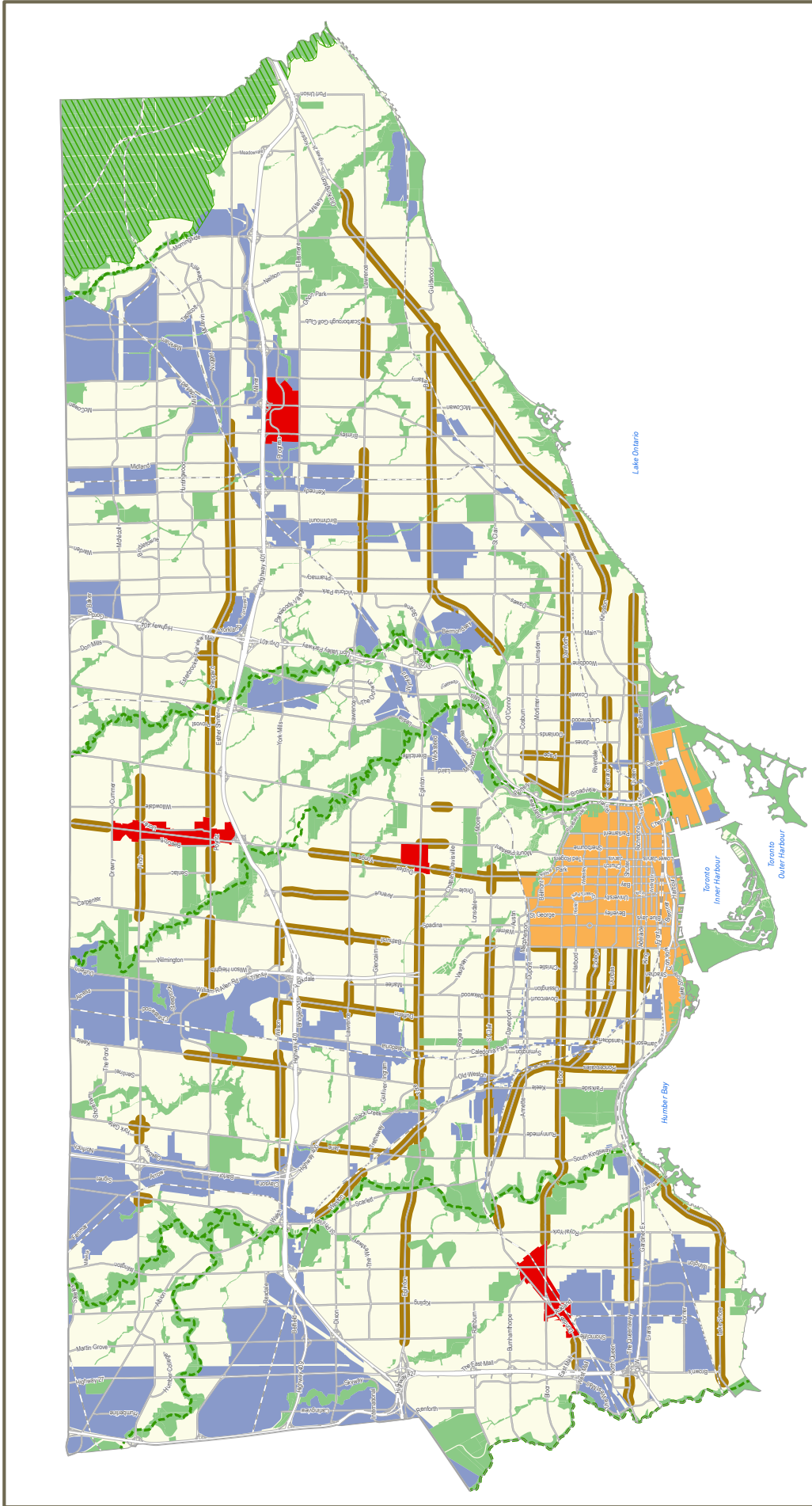
City is also working to facilitate more low-rise housing in residential neighbourhoods to meet the needs of our growing city through the Expanding Housing Options in Neighbourhoods (EHON) initiative.³

Toronto's Development Pipeline

What is the Development Pipeline?

The City of Toronto's Development Pipeline consists of all development projects in the City of Toronto with any development activity in the five-year window, between January 1, 2016 and December 31, 2020. This provides a lens through which to monitor Toronto's near-term housing supply which in turn provides an extensive representation of development activity within the city. A development project is the collection of Planning and Building Permit Applications having to do with a single site. Development activity refers to progress at any stage of the approvals and development processes, including: Planning application submission, review and approval; Building Permit application and issuance, construction, occupancy, and completion.

Map 1: Official Plan Urban Structure Map










Toronto Official Plan

Map 2

Urban Structure

February 2019

-  Green Space System
-  Greenbelt Protected Countryside
-  Greenbelt River-Valley Connections

-  Avenues
-  Centres
-  Employment Areas
-  Downtown and Central Waterfront



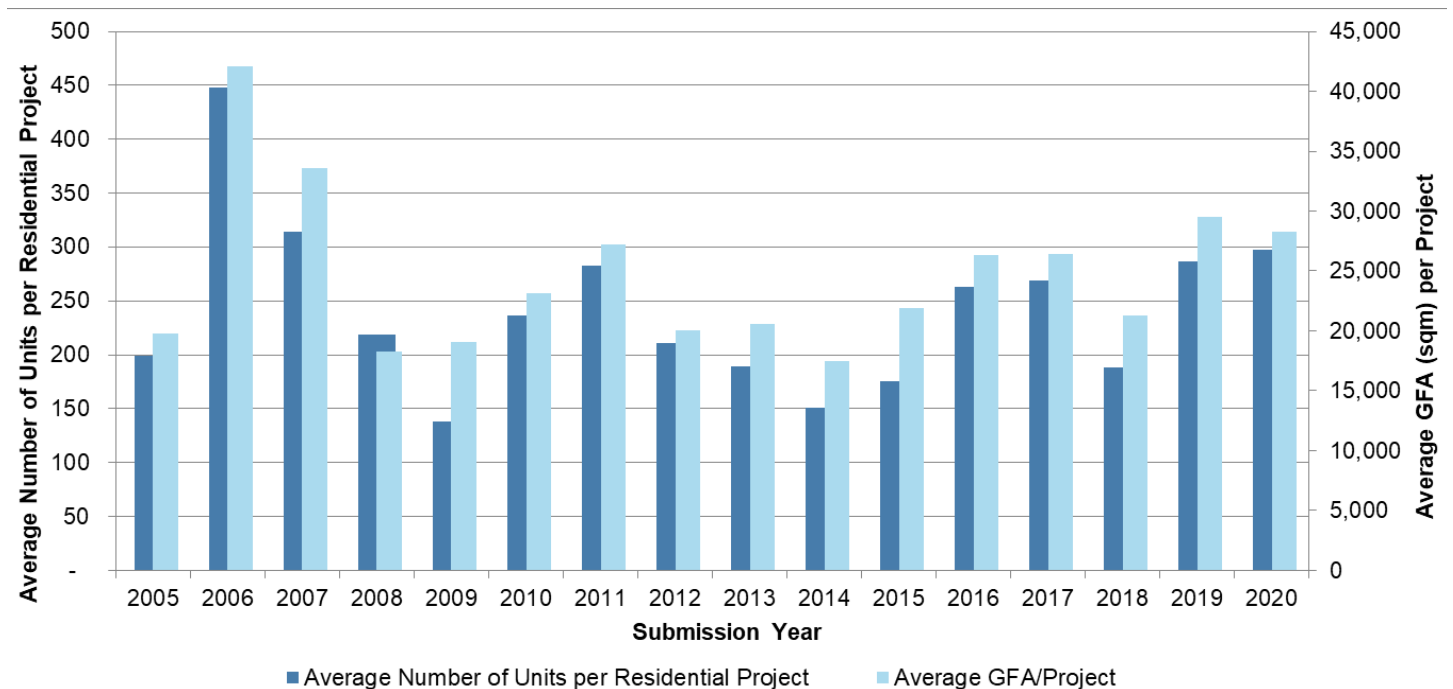
Projects are categorized into three general statuses, based on the stage of the development approvals and construction process they reached between January 1, 2016 and December 31, 2020.

- Built projects are those which became ready for occupancy and/or were completed during the period.
- Active projects are those which have received at least one Planning approval but which have not yet been built, including:
 - projects with their first Planning approval such as approved Official Plan Amendments and/or Zoning By-law Amendments, which may or may not have applications for Site Plan Control submitted or approved;
 - projects with some Planning approvals and for which Building Permits have been applied for or have been issued but for which construction has not yet started; and
 - projects which are under construction but are not yet built.
- Under Review projects are those which have not yet been approved or refused, and those which are under appeal.

The Development Pipeline Prior to 2016

Previous versions of the Pipeline before 2016 are not directly comparable. Prior to 2016, previous issues of this bulletin reported on all applications received within a five-year period. An increasing number of projects still progressing through the development approvals process fell outside of the Pipeline window. Over time projects have become larger and more complex and subsequently require a longer review and construction process (see Figure 1). Consequently, in 2016, the Development Pipeline was enhanced to identify projects with any approval or construction activity within the five-year timeframe, to provide a more fulsome representation of near-term housing supply in the city.

Figure 1: Proposed Units and GFA per Residential Project by Submission Year



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

Development projects submitted between January 1, 2005 and December 31, 2020 and with activity between January 1, 2016 and December 31, 2020.

Proposed GFA includes residential and non-residential GFA.

Project Stages and Statuses

Status	Stage
Under Review	Planning Application Submitted
Active	Delegated/Council Approval
Active	Permit Application
Active	Issuance of a Permit
Active	Work Started
Built	Ready for Occupancy
Built	Work Completed

Delegated approval refers to Site Plan or Plan of Condominium approvals that have been granted by the Chief Planner.

The tracking of development projects has been improved, and undergoes continuous improvement. For example, complex projects have been split into phases so that the different parts of a project can be tracked at different stages of development as they are submitted. This has enabled each phase to be reflected in the Pipeline until that phase is either built or becomes inactive. Tracking has been further enhanced through a two-year data maintenance project, enabling the distinction between existing buildings, uses and residential units that may be retained on the site from previous development, and the new buildings, uses and residential units proposed to be added to the site. The Pipeline in this bulletin reports on newly proposed uses, units and spaces.

The Development Pipeline January 1, 2016 – December 31, 2020

Toronto continues to experience strong growth and development activity (see Maps 2 and 3 on pages 5 and 6). The 2020 Development Pipeline is comprised of 2,114 development projects (see Table 1). Cumulatively, these projects propose a record 503,362 residential units and 12,853,823 square metres of non-residential gross floor area (GFA) (see Tables 2 and 3 on page 7).

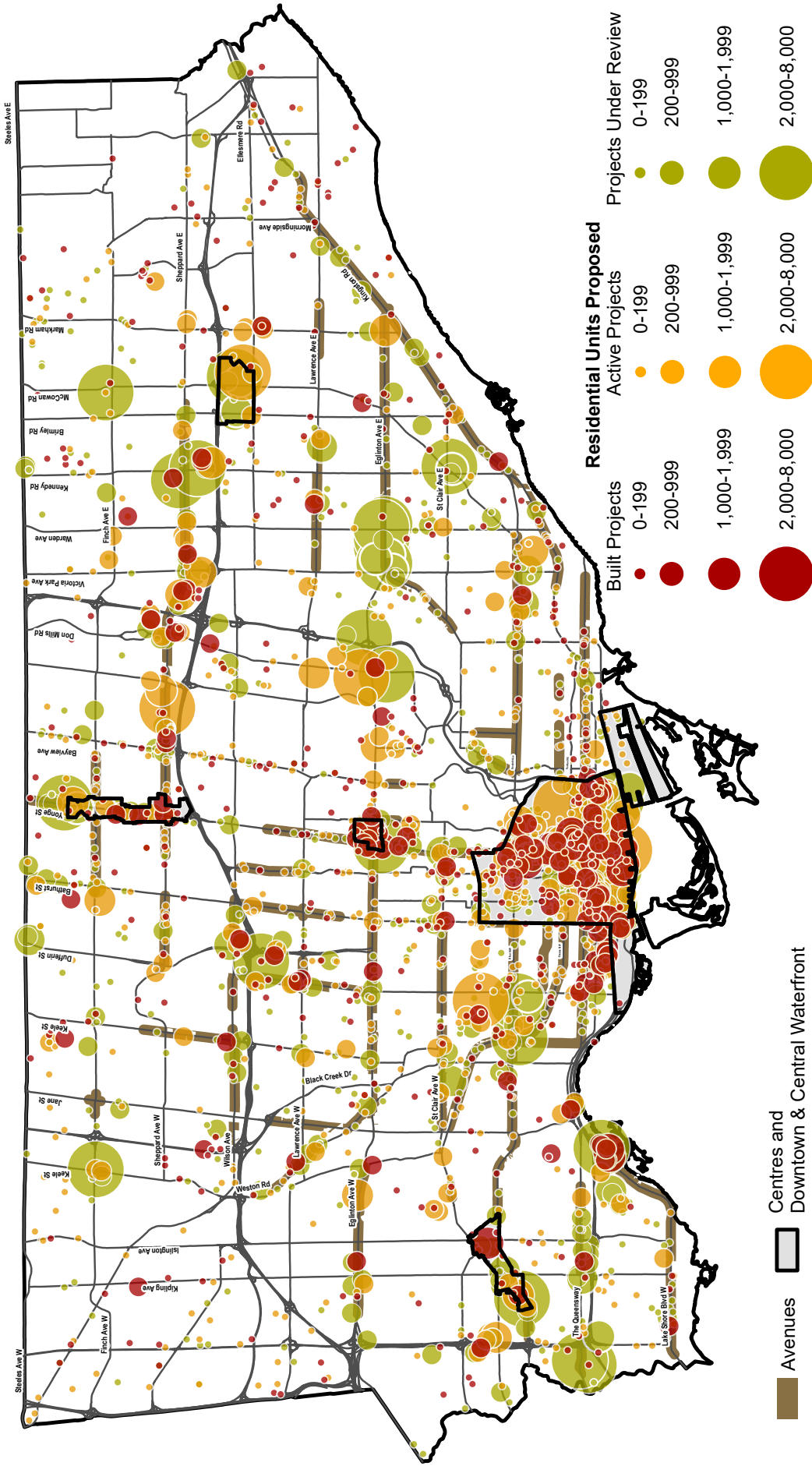
Table 1: Proposed Projects in City of Toronto by Status

	Built	Active	Under Review	Total in Pipeline	% of Total
City of Toronto	584	756	774	2,114	100.0
Growth Areas	335	471	513	1,319	62.4
Downtown and Central Waterfront	122	175	170	467	22.1
Centres	30	31	44	105	5.0
Avenues	124	187	211	522	24.7
Other Mixed Use Areas	59	78	88	225	10.6
All Other Areas	249	285	261	795	37.6

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

Development projects with activity between January 1, 2016 and December 31, 2020. 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.

Map 2: City of Toronto Proposed Residential Development

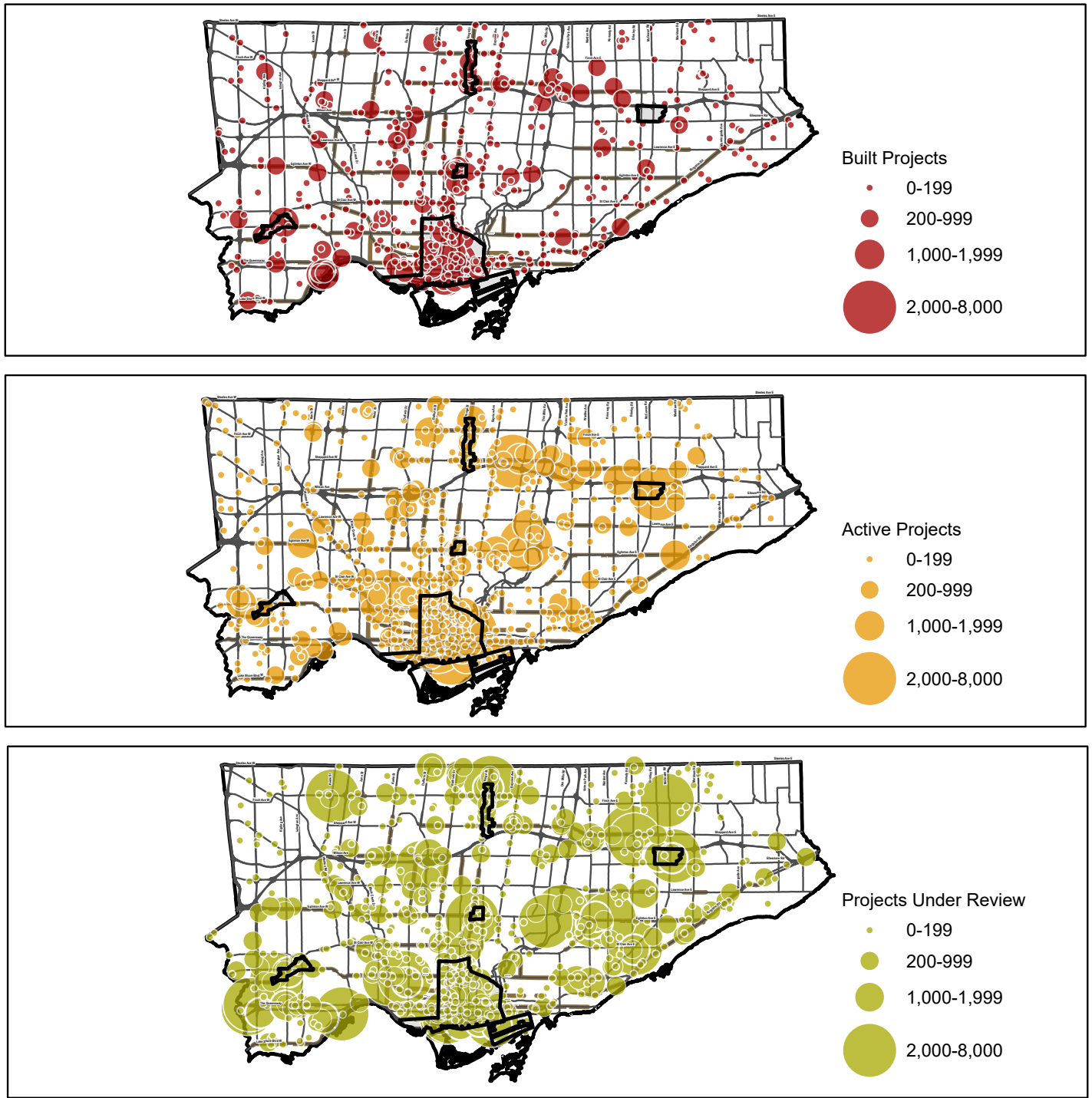


Source: Land Use Information System II
 Development projects with activity between January 1, 2016 and December 31, 2020. Built projects are those which became ready for occupancy and/or were completed. Active projects are those which have been approved, for which Building Permits have been applied or 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, Planning Research and Analytics - June 2021

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Map 3: City of Toronto Proposed Residential Development by Status



Source: Land Use Information System II
 Development projects with activity between January 1, 2016 and December 31, 2020. 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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Avenues

Centres and Downtown & Central Waterfront

Recent years of data maintenance by City Planning staff have enabled the inclusion of Table 4a and Table 4b, which represent both retained and proposed residential units as well as residential and non-residential GFA in square metres. Over 93% of the total

residential units are proposed and the remaining 7% are retained from the previous uses. Over 92% of total residential GFA is proposed and 8% is retained, whereas almost 65% of total non-residential GFA is proposed while 35% is retained uses.

Table 2: Proposed Residential Units in City of Toronto by Status

	Built	Active	Under Review	Total in Pipeline	% of Total	% of Growth Areas
City of Toronto	93,836	162,757	246,769	503,362	100.00	
Growth Areas	83,582	145,717	204,787	434,086	86.2	100.0
Downtown and Central Waterfront	41,685	61,922	55,395	159,002	31.6	36.6
Centres	9,799	17,612	24,702	52,113	10.4	12.0
Avenues	20,216	32,600	68,063	120,879	24.0	27.8
Other Mixed Use Areas	11,882	33,583	56,627	102,092	20.3	23.5
All Other Areas	10,254	17,040	41,982	69,276	13.8	

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

Proposed residential units in development projects with activity between January 1, 2016 and December 31, 2020. 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 3: Proposed Non-Residential GFA (m²) in City of Toronto by Status

	Built	Active	Under Review	Total in Pipeline	% of Total	% of Growth Areas
City of Toronto	2,413,647	5,561,590	4,878,586	12,853,823	100.0	
Growth Areas	1,373,936	3,113,509	3,303,586	7,791,031	60.6	100.0
Downtown and Central Waterfront	926,222	2,175,222	1,774,008	4,875,452	37.9	62.6
Centres	77,257	129,593	213,546	420,397	3.3	5.4
Avenues	190,949	284,894	644,069	1,119,912	8.7	14.4
Other Mixed Use Areas	179,508	523,800	671,963	1,375,271	10.7	17.7
All Other Areas	1,039,712	2,448,082	1,574,999	5,062,793	39.4	

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

Proposed non-residential GFA in development projects with activity between January 1, 2016 and December 31, 2020. 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.

The Development Pipeline tracks and reports on residential units which are newly proposed as part of a development project. In order to realize these proposed residential units, existing residential units may be demolished. The number of “net new” proposed units, which are the proposed units less the units demolished to realize them, can be estimated using Demolition Permits issued by the Toronto Building Division. Based on Demolition Permits in the City of Toronto over the past 16 years from 2005 to 2020, the overall average rate of demolition versus housing units started is 7.8% and the demolition rate is 8.9% of the units completed over the same period as reported by Canada Mortgage and Housing Corporation (CMHC).

Table 4c applies the demolition rate to the number of proposed residential units and proposed

residential gross floor area within the current Development Pipeline. Using the demolition rate of 8.9%, the Development Pipeline contains an estimated 458,563 net new residential units and 35,519,123 m² of net new residential GFA. This is a conservative estimate of the net new housing supply if the Development Pipeline were realized.

The majority of the Demolition Permits issued were for the teardown and replacement of single houses or were associated with lot severances. As-or-right construction, or development below the Site Plan Control threshold, does not require a Site Plan application and is not captured by the Development Pipeline. To apply the overall average demolition rate to the Pipeline will significantly overestimate the units that would need to be demolished to realize the housing potential in the Pipeline.

Table 4a: Proposed, Retained and Total Residential Units and GFA (m²)

	Retained	Proposed	Total	Proposed %
Units	36,754	503,362	540,116	93.2%
Residential GFA	3,224,666	38,989,158	42,214,545	92.4%
Non-Residential GFA	7,001,806	12,853,823	19,855,629	64.7%

Table 4b: Proposed, Retained and Total Non-Residential GFA (m²)

	Retained	Proposed	Total	Proposed %
Total	7,001,806	12,853,823	19,855,629	64.7%
Under Review	2,356,897	4,878,586	7,235,483	67.4%
Active	2,218,046	5,561,590	7,779,637	71.5%
Built	2,426,862	2,413,647	4,840,510	49.9%

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

Proposed, retained and total residential units, residential GFA, and non-residential GFA in development projects with activity between January 1, 2016 and December 31, 2020. 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.

The 2020 Pipeline contained 68,293 more residential units than the 2019 Pipeline which reported on projects active between January 1, 2015 and December 31, 2019. This is growth of 16% in the near-term housing supply in a single year. The 2020 Pipeline also contains 768,675 m² more non-residential GFA or 6% more space over the 2019 Pipeline. The 2020 Pipeline only contains two more development projects than the 2019 Pipeline (2,114 versus 2,112). This surge in both residential and non-residential supply confirms the continuing trend towards larger and more complex projects since the Official Plan was adopted by Council in 2002.

The residential projects in growth management areas of the Official Plan (as described in the Introduction) are almost 11% larger on average than those elsewhere in the city (see Table A.1 in the Appendix). While the size

of residential projects in Downtown and the Central Waterfront has grown slightly, projects in the Centres, along the Avenues and in other *Mixed Use Areas* have grown by a range of 34 to 86 units on average across the different types of growth management areas. This indicates a dispersal of growth and project size to more areas of the city. Average non-residential space per project has also increased significantly in all areas within the city. Projects are also becoming larger within the Pipeline itself. Active residential projects are 34% larger than those already built, while projects Under Review are on average a little over a third larger than those recently completed. The average amount of non-residential space in Under Review and Active projects is more than twice the overall average (see Table A.1 in the Appendix).

Table 4c: Estimated Net Supply of Residential Units and GFA

8.9% Average Demolition Rate	Residential Units			Residential GFA (m ²)		
	Proposed	Estimated Demolition	Net New Units	Proposed	Estimated Demolition	Net New GFA
Total	503,362	44,799	458,563	38,989,158	3,470,035	35,519,123
Under Review	246,769	21,962	224,807	18,811,480	1,674,222	17,137,258
Active	162,757	14,485	148,272	12,903,702	1,148,429	11,755,273
Built	93,836	8,351	85,485	7,273,976	647,384	6,626,592

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

Proposed residential units and residential GFA in development projects with activity between January 1, 2016 and December 31, 2020. 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. Citywide demolition rate is based on Demolition Permits issued 2005-2020 versus CMHC Completions over the same period.

As the average size of development projects increases, so does the magnitude of development approved by Council. Over the five years from 2016 to 2020, Council has approved more residential units than were built (see Table 5). City Council approved an average of 28,170 residential units per year between 2016 and 2020, while 15,303 units on average were built annually. This is a surplus of 12,867 units on average or 84% of the average annual production through the Pipeline. This surplus helps to ensure a steady supply of approved housing will be available for construction and eventual occupancy.

Despite the fact that not all proposed projects are approved, and not all approved projects are built, the Pipeline provides a good indication of near-term housing supply.

Built Projects

Many projects with development activity between 2016 and 2020 have become occupied or have completed construction during this period. In the current Pipeline, 584 projects (28% of the total) have completed construction or received a Partial Occupancy Permit. These projects represent an addition of 93,836 newly constructed residential units to the city's housing supply and 2,413,647 m² of non-residential GFA (see Tables 2 and 3 on page 7).

Table 5: Residential Units Approved and Built by Year

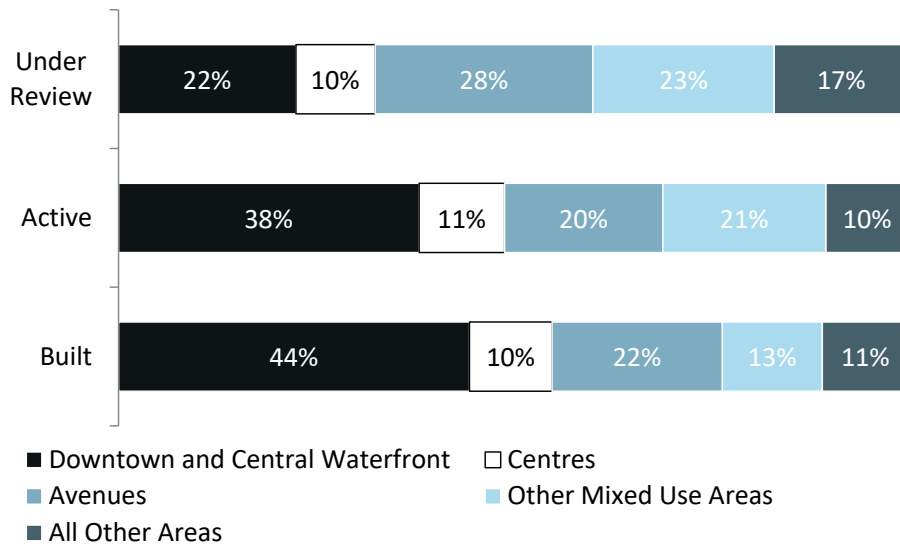
Year	Units Approved	Units Built
2016	17,992	16,684
2017	27,526	10,939
2018	38,371	19,024
2019	35,641	13,043
2020	21,318	16,823
Total	140,848	76,513
Average	28,170	15,303

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

Proposed residential units in development projects with activity between January 1, 2016 and December 31, 2020. Units approved are units in projects that received their first planning approval in the year listed. Units built are units in projects that became ready for occupancy and/or were completed in the year listed.

Note: the number of units built in Table 5 may differ from the number of units in built projects listed in Table 4, as some projects became ready for occupancy before 2016 but had other development activity (such as an application for a Draft Plan of Condominium) during the pipeline window of January 1, 2016 to December 31, 2020. These figures are different than those in Tables 5 and 7 because units in the planning process are recognized as completed when the building is ready for occupancy or substantially complete, whereas CMHC recognizes units as built once the building is fully complete.

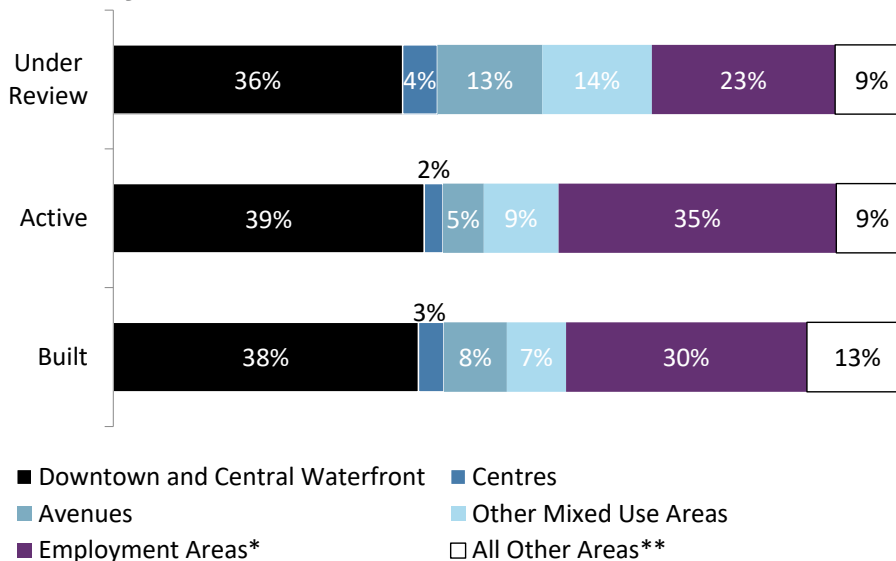
Figure 2: Proposed Residential Units in Growth Areas by Status



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

Proposed residential units in development projects with activity between January 1, 2016 and December 31, 2020. 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.

Figure 3: Proposed Non-Residential Gross Floor Area in Growth Areas by Status



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

Proposed non-residential GFA in development projects with activity between January 1, 2016 and December 31, 2020. 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.

Percentages may not total 100 due to rounding.

*Employment Areas are outside of Downtown, Centres, Avenues, and Other Mixed Use Areas.

**All Other Areas in this figure include Employment Areas.

Active Projects

In the current Pipeline, 32% of projects are active with at least one Planning approval, accounting for 162,757 residential units and 5,561,590 m² of non-residential GFA. Residential projects that are approved but not yet built represent approximately 10 years of potential housing supply,

given the average pace of completions reported by CMHC (see Table 6). At any given time, there are active residential projects at different stages of development from an initial approval to the beginning of construction. Table 7 shows all proposed residential units in active projects broken down by the stage of activity.

Table 6: Dwelling Completions, Greater Toronto Area

Year	Toronto	GTA	Toronto % of GTA
1991 - 1995	29,500	112,853	26.1%
1996 - 2000	32,517	140,983	23.1%
2001 - 2005	58,763	219,839	26.7%
2006 - 2010	58,217	177,801	32.7%
2011 - 2015	85,166	181,980	46.8%
2016 - 2020	78,153	176,198	44.4%
Total	342,316	1,009,654	33.9%
Average 1991-2020	11,411	33,655	33.9%
Average 2011-2020	16,332	35,818	45.6%
Average 2016-2020	15,631	35,240	44.4%

Source: Canada Mortgage and Housing Corporation, *Monthly Housing Now - Greater Toronto Area Reports*

Note: Completions are for whole calendar years

Table 7: Proposed Residential Units in Active Projects by Stage

Stage as of December 31, 2020		Proposed Residential Units in Active Projects		Active Residential Projects	
Stage	Stage Description	Number	Percent	Number	Percent
2	Delegated / Council Approval*	62,238	38%	276	37%
3	Permit Application	17,540	11%	85	11%
4	Issuance of a Permit	6,130	4%	41	5%
5	Work Started	76,849	47%	354	47%
Total		162,757	100%	756	100%

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

Active residential units and development projects with activity between January 1, 2016 and December 31, 2020. 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.

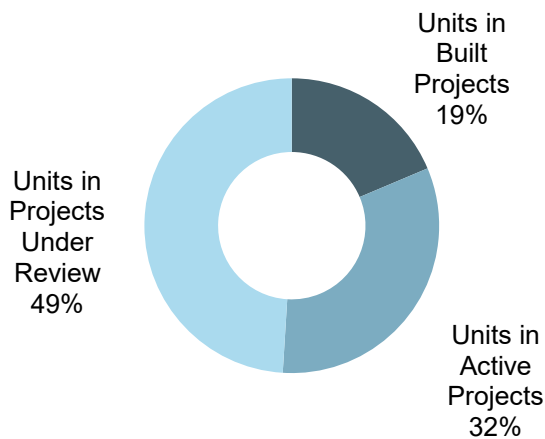
*Delegated approval refers to Site Plan or Plan of Condominium approvals that have been granted by the Chief Planner.

Projects Under Review

In the current Pipeline, there are 246,769 residential units and an additional 4,878,586 m² of non-residential GFA in projects currently under review. Figure 4a displays these units by status, showing that 49% of all proposed residential units are currently under review and Figure 4b shows that 43% of all proposed non-residential GFA are all currently active.

Across the city, more than three-quarters of the residential units and non-residential GFA proposed in the Development Pipeline are not yet built. There are 409,526 residential units and 10,440,176 m² of non-residential GFA that are either under review or active, indicating a continuation of strong construction activity in Toronto in the coming years. If all of these units were eventually built, the total number of dwellings in the city would increase by over one third.

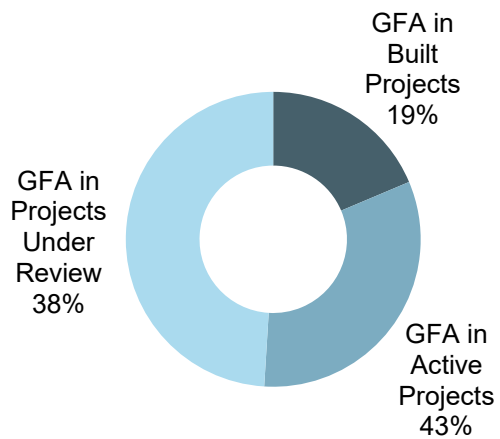
Figure 4a: Residential Units by Status



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

Proposed residential units in development projects with activity between January 1, 2016 and December 31, 2020. 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. Percentages may not total 100 due to rounding.

Figure 4b: Non-Residential GFA by Status



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

Proposed non-residential GFA in development projects with activity between January 1, 2016 and December 31, 2020. 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. Percentages may not total 100 due to rounding.

Dwelling Unit Completions and Absorptions

The city continues to be an exceptionally attractive location for residential development in the Greater Toronto Area (GTA). According to CMHC, Toronto represents about a third of the housing completions in the GTA since 1991 (34%, see Table 6 on page 12). Toronto's housing construction has recovered from the 2008 global recession (see Figure A.1 in the Appendix). Despite the COVID-19 Pandemic, 17,276 units were completed in 2020, the highest figure of the past five years, and 18% more completions than in 2019 (see Table 8 on page 15). Over the last 10 years, unit completions have averaged 16,332 units per year. On average 10% of the units built per year were ground-related, or 1,082 single detached houses (6.6%), 120 semi-detached houses (0.7%), 492 row or townhouses (3.0%) per annum, while 89.6% or 14,637 units were apartments and other units (see Table A.2 in the Appendix).

High-density condominium apartments continue to dominate the new construction landscape in Toronto. Just over 80% or 13,124 units of the built units since 2011 are Condominium units (see Table A.3 in the Appendix). CMHC recorded 78,153 residential units completed in Toronto between 2016 and 2020 inclusive and 77% of these units were condominium apartments.⁴

Along with their Starts and Completions Survey, CMHC also conducts a Market Absorption Survey to determine when residential units are sold or rented once a structure has been constructed. Table 8 (on page 15) compares the number of completions and absorptions in Toronto over the last 15 years. The average percentage of unabsorbed units increased slightly from 4% in the 2006 to 2010 period to 5% from 2011 to 2015. However, it has decreased to 0.1% for the 2016 to 2020 period.

The Market Absorption Survey demonstrates that the bulk of the unabsorbed units are in the purpose-built rental market. Rental completions represented 13% of total completions, but only 12% of total absorptions (see Table A.4 in the Appendix). The higher rate of unabsorbed rental units is not the result of an oversupply of this type of unit. The methodology of the Market Absorption Survey requires that buildings must be 100% completed and that people are beginning to move in before the units become counted as "absorbed". The recording of absorptions will tend to lag completions in the latest periods of the Survey. Therefore, the data on absorptions and completions needs to be cautiously interpreted.

Development in Toronto's Growth Areas

Toronto's Official Plan sets out the urban structure of the city to guide its development over the next few decades. The Plan develops a strategy for directing appropriate growth within this structure and sets out the policies for the management of change, through the integration of land use and transportation. Some areas of the city identified for growth also need more detailed guidance in the form of Secondary Plans, area studies, policies to guide local planning and innovative implementation solutions. The Plan is intended to contribute to a future in which the private sector marshals its resources to help implement public policy objectives, one in which housing choices are available for all people in their communities at all stages of their lives. The 2020 Development Pipeline shows that 86% of proposed residential units and 61% of non-residential development is proposed in areas targeted for growth by the City's Official Plan, including Downtown and the Central Waterfront, the Centres, the Avenues, and other *Mixed Use Areas*.

Downtown and Central Waterfront

Downtown and the Central Waterfront area is one of the most prominent locations for development activity across the city and contains the largest number of proposed residential units and the most proposed non-residential GFA of any growth management area. In the current Development Pipeline, the projects submitted in this area proposed 159,002 new units and

4,875,452 m² of non-residential GFA. This comprises 32% of the residential units and 38% of the non-residential GFA proposed in the entire city (see Tables 2 and 3 on page 7).

Map 4 (on page 17) shows the distribution of residential and non-residential projects throughout Downtown. The Yonge Street corridor and the Central Waterfront have attracted increasingly large

residential development proposals. The proposed projects in Downtown with 1,000 residential units or more are listed in Table 9 (on page 16). One example is Regent Park, a public-private partnership that is in the midst of revitalizing existing social housing stock. On completion, Regent Park will include new retail, community spaces, services, and infrastructure within a more mixed-income and mixed-use neighbourhood.

Table 8: Dwelling Unit Completions and Absorptions, City of Toronto

Year	Completions	Absorptions	Net Completions	"Unabsorbed" Percentage
2006	12,420	11,962	458	3.8%
2007	6,786	7,159	-373	-5.2%
2008	13,450	12,878	572	4.4%
2009	12,473	11,704	769	6.6%
2010	13,088	12,075	1,013	8.4%
2011	16,850	15,868	982	6.2%
2012	13,474	12,009	1,465	12.2%
2013	14,542	13,868	674	4.9%
2014	9,551	9,620	-69	-0.7%
2015	30,749	29,451	1,298	4.4%
2016	16,027	16,629	-602	-3.6%
2017	14,171	14,675	-504	-3.4%
2018	16,086	15,855	231	1.5%
2019	14,593	13,850	743	5.4%
2020	17,276	17,063	213	1.2%
Total	221,536	214,666	6,870	3.2%
2006-2020 Average	14,769	14,311	458	3.2%
2006-2010 Average	11,643	11,156	488	4.4%
2011-2015 Average	17,033	16,163	870	5.4%
2016-2020 Average	15,631	15,614	16	0.1%

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

Note 1: The data in Table 8 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, 2021 year-to-date data has been excluded.

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

Table 9: Downtown Development Projects Proposing ≥1,000 Residential Units

	Proposed Residential Units		Proposed Residential GFA (m ²)		Proposed Storeys (Tallest Building)	Proposed Buildings
	#	%	#	%	#	#
Downtown and Central Waterfront	159,002	100.0%	4,875,452	100.0%		
Proposed Residential Units ≥ 1,000	52,805	33.2%	3,832,066	78.6%		
<i>Built Projects</i>	8,699	16.5%	612,024	16.0%		
90 HARBOUR ST	1,426	2.7%	85,924	2.2%	70	3
25 QUEENS QUAY E	1,408	2.7%	138,213	3.6%	48	5
16 YORK ST ¹	1,343	2.5%	87,650	2.3%	67	2
475 FRONT ST E	1,316	2.5%	93,958	2.5%	58	7
578 FRONT ST W	1,191	2.3%	76,569	2.0%	20	4
200 DUNDAS ST E	1,012	1.9%	54,250	1.4%	45	1
50 ST JOSEPH ST	1,003	1.9%	75,460	2.0%	55	2
<i>Active Projects</i>	25,980	49.2%	1,963,551	51.2%		
325 GERRARD ST E	4,705	8.9%	469,000	12.2%	29	36
55 LAKE SHORE BLVD E	4,571	8.7%	340,588	8.9%	90	5
1 YONGE ST	2,864	5.4%	215,668	5.6%	95	4
266-270 KING ST W	2,087	4.0%	137,438	3.6%	92	2
571 DUNDAS ST W ²	1,900	3.6%	199,464	5.2%	21	17
261 QUEENS QUAY E ³	1,833	3.5%		0.0%	0	9
2 BLOOR ST W	1,595	3.0%	114,988	3.0%	75	3
177 FRONT ST E	1,531	2.9%	107,480	2.8%	29	3
23 SPADINA AVE	1,373	2.6%	108,552	2.8%	69	2
6 GLEN RD	1,339	2.5%	99,693	2.6%	50	4
363 YONGE ST	1,103	2.1%	75,636	2.0%	83	1
37 YORKVILLE AVE	1,079	2.0%	95,044	2.5%	67	1
<i>Projects Under Review</i>	18,126	34.3%	1,256,491	32.8%		
433 FRONT ST W	3,500	6.6%	207,100	5.4%	59	10
429 LAKE SHORE BLVD E	2,280	4.3%	153,960	4.0%	55	13
400 FRONT ST W	2,226	4.2%	142,037	3.7%	63	3
33 GERRARD ST W	1,667	3.2%	118,672	3.1%	85	4
200 QUEENS QUAY W	1,482	2.8%	95,526	2.5%	71	1
80 BLOOR ST W	1,356	2.6%	102,942	2.7%	72	1
245 QUEEN ST E	1,250	2.4%	96,790	2.5%	33	3
215 LAKE SHORE BLVD E	1,147	2.2%	82,782	2.2%	49	3
88 QUEEN ST E	1,117	2.1%	84,544	2.2%	79	3
440 FRONT ST W	1,088	2.1%	100,524	2.6%	68	5
309 CHERRY ST ⁴	1,013	1.9%	71,614	1.9%	52	3

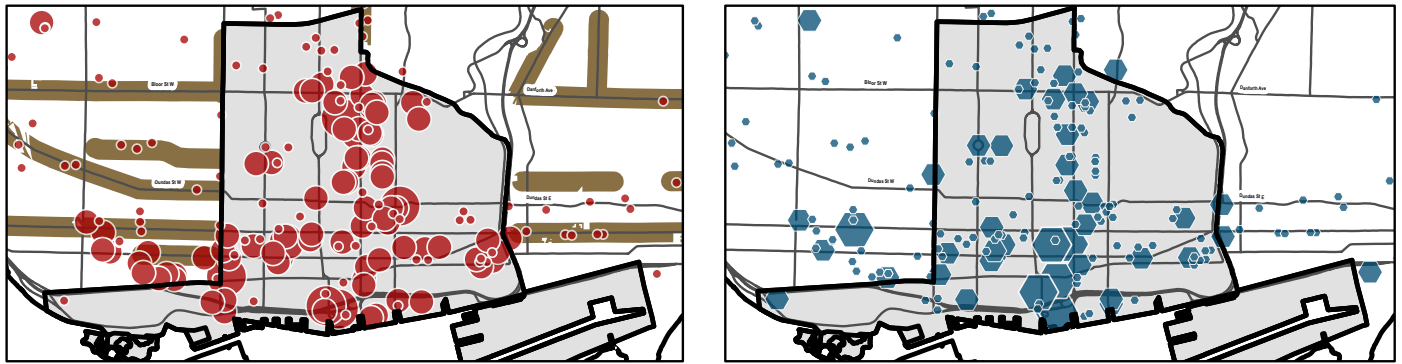
Source: City of Toronto, City Planning: Land Use Information System II

Development projects with activity between January 1, 2016 and December 31, 2020. 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.

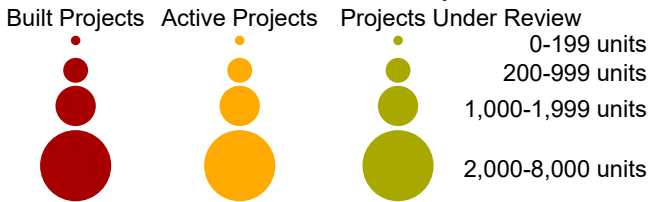
Notes:

- 1: Residential portion of a phased project originally submitted as 16 York St.
- 2: Phase 2 only; Phases 1a and 1b are recorded as separate projects.
- 3: Complete Residential GFA information for 261 Queens Quay E is not yet available
- 4: Phase 2 only; Phase 1 is recorded as a separate project.

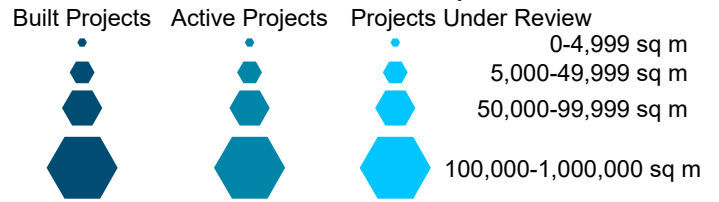
Map 4: Downtown and Central Waterfront Development Activity



Residential Units Proposed



Non-Residential GFA Proposed



Source: Land Use Information System II

Development projects with activity between January 1, 2016 and December 31, 2020. 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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Avenues

Centres and Downtown & Central Waterfront

Dundas Street Name Review

It is important to note here that recent local and world events have led to discussions on racial injustices, inequality and anti-Black racism which in turn have resulted in scrutiny of the origins and history of monuments, street names, parks and buildings across the city. These conversations have also led to the creation of an online petition by members of the public calling for Dundas Street to be renamed.

In September 2020, City staff prepared a Staff Report addressing the request to rename Dundas Street, also proposing that the City look at how systematic racism and discrimination may be embedded in other City assets, commemorative programs and naming policies. That report was adopted by City Council on September 30, 2020, with some amendments. The City Manager will report to the June 1, 2021 meeting of Executive Committee to seek Council direction on a preferred option for responding to the petition to rename Dundas Street and address other civic assets with a Dundas name; a work plan to implement it; and an overall framework of guiding principles for commemorative naming and renaming and other forms of civic recognition.

For more information and the City's next steps, please see the Recognition Review: The Petition to Rename Dundas Street on the City's website: <https://www.toronto.ca/community-people/get-involved/community/recognition-review/>

A notable amount of non-residential activity is occurring in Downtown. In the current Pipeline, there are 11 large projects each proposing over 100,000 m² of non-residential GFA in the Downtown and Central Waterfront area; see Table 10 (on page 20). Many of the largest projects with non-residential components are mixed-use projects that incorporate housing. While most of the major projects are primarily office space, there are notable examples with other types of non-residential uses in Downtown including:

- The ongoing Union Station Revitalization at 61 Front St W;
- The built project at 18 York St includes the Delta hotel and other commercial uses connected to the PATH among residential and office components;
- The approved new courthouse at 11 Centre Ave for which construction work has started;
- The project at 333 King St E which retains the Globe and Mail Centre, while the Coca Cola/George Brown College property also proposes office uses in addition to a 1,000 square metre POPS (privately owned, publicly accessible open space); and
- The proposed Ryerson University student residence at 202 Jarvis St.

These projects are in addition to 19 other development projects in Downtown, proposing 2,598,056 m² of non-residential floor space in total.

Map 4 also shows a strong north-south trend of recently built non-residential development activity between University Avenue and Yonge Street, with the largest built projects located in this corridor. There has been a shift in the non-residential market towards a more east-west pattern of development, with all of the largest Active and Under Review projects proposed south of Dundas Street. Many of these are large, phased, mixed-use projects, proposed

mainly on lands designated as *Mixed Use Areas* or *Regeneration Areas* and in *Secondary Plan* areas that permit both residential and non-residential development. More recently, there has been a concentration of smaller projects (under 50,000 square metres), particularly those projects which are under review, proposing development with a non-residential component along and north of College Street.

Centres

The four Centres are focal points of transit infrastructure where jobs, housing, and services are concentrated. They are vital to the City's growth management strategy. There are 105 projects in the Development Pipeline that are located in the Centres and which contain 10% of the city's proposed residential units and 3% of non-residential GFA. Collectively, these projects account for 52,113 residential units and 420,397 m² of non-residential GFA. Almost 81% of proposed residential units in the Centres are either approved but not yet built, or under review, so there is likely to be substantial construction in the Centres in coming years.

The residential projects in the Centres are generally high-density developments with an average of 496 residential units per project. This is the highest average project size in the growth management areas. In comparison, residential projects in Downtown have an average of 340 units while the citywide average is 238 units per project (see Table A.1 in the Appendix).

Avenues

The Avenues are corridors along major streets that are well served by transit and expected to redevelop incrementally over time. They play an important role within Toronto's urban structure by providing locations for redevelopment outside of the Centres and Downtown. The Avenues contain the most proposed projects of any single growth area (522). They have

120,879 residential units and 1,119,912 m² of non-residential GFA proposed in the Development Pipeline. This represents 24% of the city's proposed units and 9% of its proposed non-residential GFA.

More than 80% of the residential units are in projects that are active or under review. Combined, these units represent 5 times the magnitude of housing supply that have been built along Avenues over the past five years. This trend represents the successful uptake of the Avenues policy framework and points to ongoing strength in residential development in these areas in coming years.

There is 475,843 m² of non-residential GFA that has been built or is in Active projects along Avenues over the past five years. In addition, 644,069 m² or 58% of proposed non-residential GFA on the Avenues is still under review, indicating that there is also likely to be substantial non-residential construction on the Avenues in the years to come.

Other Mixed Use Areas

Outside of Downtown, the Centres and the Avenues, there are numerous other locations throughout the city that are designated as *Mixed Use Areas* and encourage a broad range of commercial, residential and institutional uses. The additional *Mixed Use Areas* have 102,092 residential units and 1,375,271 m² of non-residential GFA proposed. This accounts for 20% of the city's proposed residential units and 11% of its proposed non-residential GFA. Over 88% of the proposed residential units in these areas are in projects that are either under review or active. Similarly, 87% of the proposed non-residential development is in Active and Under Review projects.

All Other Areas

Just under 70,000 residential units or 14% of the units proposed in the city are outside of the growth areas of Downtown, the Centres, the Avenues and other *Mixed Use Areas*.

These projects are generally smaller replacement infill developments in areas designated as Neighbourhoods. About 60% of the residential units proposed in All Other Areas are under review.

There is 5,062,793 m² of non-residential GFA proposed in these Other Areas. Over 60% of this space is located in the designated Core or General Employment Areas which the Official Plan also targets for non-residential growth. Just under half of non-residential GFA proposed in All Other Areas is approved but not yet built.

Table 10: Projects Proposing ≥50,000 m² Non-Residential GFA

	Project Location	Proposed Non-Residential GFA (m ²)	Percent
City of Toronto		12,853,823	100.0%
<i>Proposed Non-Residential GFA ≥50,000 m²</i>		5,931,482	46.1% 100.0%
<i>Built Projects</i>		871,136	14.7%
6351 STEELES AVE E	All Other Areas	128,743	2.2%
2233 SHEPPARD AVE W	All Other Areas	102,991	1.7%
40 ADELAIDE ST W ¹	Downtown and Central Waterfront	94,124	1.6%
100 ADELAIDE ST W	Downtown and Central Waterfront	86,960	1.5%
90 HARBOUR ST	Downtown and Central Waterfront	86,610	1.5%
10-20 BAY ST	Downtown and Central Waterfront	81,772	1.4%
61 FRONT ST W ²	Downtown and Central Waterfront	65,861	1.1%
101 HUMBER COLLEGE BLVD	All Other Areas	59,096	1.0%
18 YORK ST	Downtown and Central Waterfront	57,792	1.0%
1001 QUEEN ST W	Avenues	54,463	0.9%
243-255 CONSUMERS RD	All Other Areas	52,724	0.9%
<i>Active Projects</i>		3,185,014	53.7%
21 DON VALLEY PKWY	All Other Areas	925,314	15.6%
82 BUTTONWOOD AVE	All Other Areas	222,878	3.8%
1201 WILSON AVE	Other Mixed Use Areas	197,884	3.3%
440 FRONT ST W	Downtown and Central Waterfront	148,713	2.5%
45 BAY ST	Downtown and Central Waterfront	143,362	2.4%
1 YONGE ST	Downtown and Central Waterfront	141,175	2.4%
141 BAY ST	Downtown and Central Waterfront	127,816	2.2%
30 BAY ST	Downtown and Central Waterfront	123,854	2.1%
171 FRONT ST W	Downtown and Central Waterfront	116,682	2.0%
156 FRONT ST W	Downtown and Central Waterfront	115,515	1.9%
555 REXDALE BLVD	All Other Areas	106,760	1.8%
844 DON MILLS RD	Other Mixed Use Areas	85,545	1.4%
880 BAY ST	Downtown and Central Waterfront	80,622	1.4%
1181 SHEPPARD AVE E	Avenues	76,546	1.3%
721 EASTERN AVE	All Other Areas	74,399	1.3%
16 YORK ST ³	Downtown and Central Waterfront	74,392	1.3%
55 LAKE SHORE BLVD E	Downtown and Central Waterfront	73,993	1.2%
40 TEMPERANCE ST ⁴	Downtown and Central Waterfront	73,865	1.2%
11 CENTRE AVE	Downtown and Central Waterfront	60,762	1.0%
158 STERLING RD	All Other Areas	59,857	1.0%
1395 TAPSCOTT RD	All Other Areas	54,179	0.9%
3125 STEELES AVE E	All Other Areas	50,730	0.9%
17 VICKERS RD	All Other Areas	50,171	0.8%
<i>Projects Under Review</i>		1,875,332	31.6%
325 FRONT ST W	Downtown and Central Waterfront	274,676	4.6%
25 KING ST W	Downtown and Central Waterfront	187,611	3.2%

Table 10 continues on the next page

Table 10 continued

	Project Location	Proposed Non-Residential GFA (m²)	Percent	
433 FRONT ST W	Downtown and Central Waterfront	157,700	2.7%	
11 BAY ST	Downtown and Central Waterfront	117,380	2.0%	
3401 DUFFERIN ST	Other Mixed Use Areas	115,224	1.9%	
25 THE WEST MALL	Other Mixed Use Areas	114,702	1.9%	
40 RAKELY CRT	All Other Areas	110,496	1.9%	
2150 LAKE SHORE BLVD W	All Other Areas	109,510	1.8%	
629 EASTERN AVE	All Other Areas	96,715	1.6%	
2280 DUNDAS ST W	Avenues	83,657	1.4%	
150 SHERWAY DR	All Other Areas	81,606	1.4%	
900 YORK MILLS RD	All Other Areas	78,495	1.3%	
5951 STEELES AVE E	All Other Areas	64,365	1.1%	
1960 EGLINTON AVE E	Avenues	62,245	1.0%	
2180 YONGE ST	Centres	60,704	1.0%	
333 KING ST E	Downtown and Central Waterfront	54,317	0.9%	
850 YORK MILLS RD	All Other Areas	53,427	0.9%	
202 JARVIS ST	Downtown and Central Waterfront	52,502	0.9%	
Proposed Non-Res GFA between 10,000 m² and 49,999 m²		4,618,180	35.9%	77.9%
Proposed Non-Res GFA less than 10,000 m²		2,466,714	19.2%	41.6%

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

Development projects with activity between January 1, 2016 and December 31, 2020. 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.

1 Phase 2 of a larger 3 phase project, including 40 Adelaide St W, 40 Temperance St and 333 Bay St

2 Union Station Revitalization project has become ready for occupancy although substantial work is still outstanding

3 Phase 3 of a larger 3 phase project

4 Phase 3 of a larger 3 phase project, including 40 Adelaide St W, 40 Temperance St and 333 Bay St

Secondary Plan Areas

Secondary Plans guide development and investment within a local context. There are 39 Secondary Plan areas which are approved and in-force, including five Secondary Plans which are newly in effect since the last publication (Mimico-Judson; Sheppard Lansing Area; Rail Deck Park; Unilever Precinct; and Don Mills Crossing). They cover a wide range of geographies within the city and can be comprised of a mix of land use designations where development may be encouraged. Some Secondary Plans also overlap areas covered by other Official Plan policies, such as Downtown, the Centres, and the Avenues. Map 5 (on page 24) displays the areas of the in-force Secondary Plans and the locations of development projects within each one.

As seen in Table 11a (on page 25), 878 projects are proposed in Secondary Plan areas or 42% of projects in the Pipeline. These projects propose 300,934 residential units and 7,628,700 m² of non-residential GFA. This represents 60% of the proposed residential units and 59% of the proposed non-residential GFA in the entire city. There are the same number of projects that are active and under review. There are slightly fewer built projects.

A number of areas covered by a Secondary Plan fall outside of Downtown, the Centres, the Avenues, and other *Mixed Use Areas*. There are 16,650 residential units and 1,412,069 m² of non-residential GFA proposed in Secondary Plan areas in All Other Areas of the city. If this development were added to the development proposed in Downtown, the Centres, the Avenues and other *Mixed Use Areas*, then 90% of the residential units and 72% of the non-residential GFA in the Pipeline would be proposed in a growth management area.

The Downtown Plan

The Downtown Plan was adopted by Council at its meeting on May 22nd, 23rd, and 24th, 2018.⁵ This Secondary Plan was approved, with modifications, by the Minister of Municipal Affairs and Housing on June 5th, 2019. This new Secondary Plan for Downtown (excluding the Central Waterfront areas west of Bathurst and east of the Don River) provides an updated growth management framework for this rapidly changing area.⁶

The Downtown Plan is a 25-year vision that sets the direction for the city centre as the cultural, civic, retail, and economic heart of Toronto. The Downtown Plan provides detailed direction on the appropriate scale and location of growth within the city's most active location for development activity.

The Downtown Plan is the largest Secondary Plan in the city geographically and is unique as a local and national economic hub. Map 5 (on page 24) shows that the Downtown Plan area contains nine Secondary Plans within its borders, including the newly approved Rail Deck Park Secondary Plan, as well as portions of the Fort York Neighbourhood Secondary Plan and the Central Waterfront Secondary Plan area. Table 11b (on page 25) shows that the Downtown Plan contains the greatest number of development projects of all the Secondary Plan areas (455). Collectively, these projects propose 157,281 residential units and account for 31% of all proposed residential units in the city. The area also contains 4,810,042 m² of non-residential GFA, accounting for 37% of all proposed non-residential GFA in the city and 63% of all proposed non-residential GFA in Secondary Plan areas.

Secondary Plan Areas within the Downtown Plan Area

The Downtown Plan area overlaps several other Secondary Plan areas. The Central Waterfront Secondary Plan area contains the largest amount of non-residential GFA after the Downtown Plan area as a whole, with 966,461 m² of non-residential GFA proposed. Most of this non-residential GFA in the Central Waterfront falls within the Downtown Plan area. There are 27,615 residential units also proposed within the Central Waterfront Secondary Plan area.

The King-Spadina Secondary Plan is an area targeted for growth and new investment. The Secondary Plan recommends that development provide a full mix of uses that are compatible with the existing and planned context, conserve cultural heritage resources, and improve and expand the public realm. The King-Spadina Secondary Plan continues to show strong development activity with the most development projects (82) after the Downtown Plan and the Yonge-Eglinton Secondary Plan. King-Spadina has the most proposed residential units second only to the Downtown Plan with 28,213 units. The Secondary Plan area represents 739,404 m² of proposed non-residential GFA.

The King-Parliament Secondary Plan was considered by the Toronto and East York Community Council on April 21st, 2021. City Council adopted the Secondary Plan and Zoning By-law Amendments without amendments and without debate. The King-Parliament Secondary Plan builds on the Downtown Plan, and provides specific direction on built form, the public realm and heritage conservation. At present, the Secondary Plan contains 46 development projects which propose 18,195 residential units and 378,232 m² of non-residential GFA.

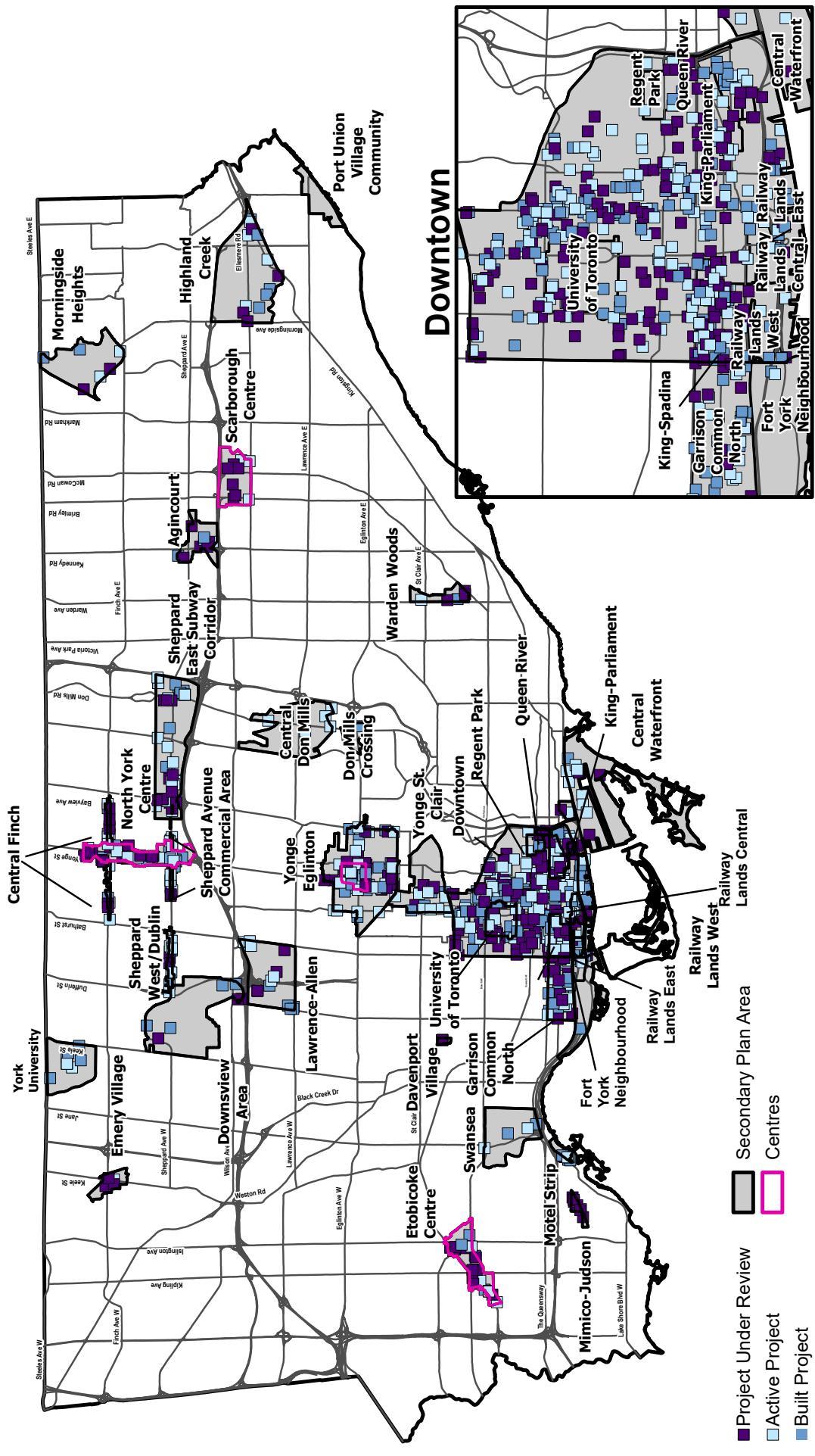
The Railway Lands East Secondary Plan is also undergoing significant non-residential development with 470,221 m² of non-residential GFA proposed. The area for this Secondary Plan is located between John Street and Yonge Street, Front Street West, and the Gardiner Expressway. The Secondary Plan requires 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 Yonge-Eglinton Secondary Plan area changes the previous Secondary Plan boundary, resulting in a 9% smaller geography.⁸ This Secondary Plan was approved by the Minister of Municipal Affairs and Housing on June 5th, 2019. Despite its reduced area, the Yonge-Eglinton Secondary Plan contains the second most development projects (94) outside of the Downtown Plan area, accounting for 28,186 proposed residential units and 245,817 m² of non-residential GFA. The Yonge-Eglinton Secondary Plan area accounts for 9% of proposed residential units within all Secondary Plan areas.

At its meeting of June 26th, 27th and 28th, 2018, City Council approved the Unilever Precinct Secondary Plan which has recently come into effect. The Secondary Plan built on Site and Area Specific Policy (SASP) No. 426 to guide the unique opportunities and challenges presented by the anticipated significant employment growth. With only two projects in the Pipeline, the area represents 926,961 m² of non-residential GFA, the third most non-residential GFA proposed in a Secondary Plan area. No residential units have been proposed. This demonstrates a continued trend toward larger projects in the Pipeline.

Map 5: Proposed Development in Secondary Plan Areas



Source: Land Use Information System II

Development projects with activity between January 1, 2016 and December 31, 2020. 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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Table 11a: Proposed Development in Secondary Plan Areas by Status

	Number of Projects	%	Proposed Residential Units	%	Proposed Non-Residential GFA (m ²)	%
City of Toronto	2,114	100.0	503,362	100.0	12,853,823	100.0
Secondary Plans	878	41.5	300,934	59.8	7,628,700	59.3
Built	244	27.8	72,215	24.0	1,305,012	17.1
Active (approved but not yet built)	317	36.1	110,553	36.7	3,681,380	48.3
Under Review (not approved)	317	36.1	118,166	39.3	2,642,308	34.6

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

Development projects with activity between January 1, 2016 and December 31, 2020. 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 11b: Proposed Development by Secondary Plan Area

Geography	Number of Projects	%	Proposed Residential Units	%	Proposed Non-Residential GFA (m ²)	%
City of Toronto	2,114		503,362		12,853,823	
Secondary Plans	878	41.5	300,934	59.8	7,628,700	59.3
Agincourt	9	1.0	10,380	3.4	81,872	1.1
Central Don Mills	6	0.7	2,367	0.8	38,336	0.5
Central Finch	16	1.8	469	0.2	1,851	0.0
Central Waterfront	51	5.8	27,615	9.2	966,461	12.7
Davenport Village	3	0.3	1,024	0.3	453	0.0
Don Mills Crossing	2	0.2	5,629	1.9	85,545	1.1
Downsview Area	7	0.8	158	0.1	76,989	1.0
Downtown	455	51.8	157,281	52.3	4,810,042	63.1
Emery Village	5	0.6	4,057	1.3	3,644	0.0
Etobicoke Centre	23	2.6	11,236	3.7	114,530	1.5
Fort York Neighbourhood	4	0.5	1,594	0.5	23,655	0.3
Garrison Common North	44	5.0	10,623	3.5	297,360	3.9
Highland Creek	13	1.5	680	0.2	60,413	0.8
King-Parliament	46	5.2	18,195	6.0	378,232	5.0
King-Spadina	82	9.3	28,213	9.4	739,404	9.7
Lawrence-Allen	15	1.7	10,960	3.6	173,273	2.3
Mimico-Judson	7	0.8	4,766	1.6	38,396	0.5
Morningside Heights	6	0.7	74	0.0	78,190	1.0
Motel Strip	7	0.8	4,361	1.4	25,968	0.3

Table 11b continues on the next page

Table 11b continued

Geography	Number of Projects	%	Proposed Residential Units	%	Proposed Non-Residential GFA (m²)	%
North York Centre	36	4.1	10,539	3.5	138,945	1.8
Port Union Village Community	0	0.0	0	0.0	0	0.0
Queen River	7	0.8	2,004	0.7	7,449	0.1
Rail Deck Park	1	0.1	3,500	1.2	157,700	2.1
Railway Lands Central	4	0.5	5,705	1.9	439,915	5.8
Railway Lands East	6	0.7	1,343	0.4	470,221	6.2
Railway Lands West	3	0.3	4,125	1.4	174,437	2.3
Regent Park	5	0.6	5,067	1.7	15,771	0.2
Scarborough Centre	9	1.0	11,644	3.9	61,264	0.8
Sheppard Avenue Commercial Area	6	0.7	65	0.0	2,789	0.0
Sheppard East Subway Corridor	43	4.9	15,319	5.1	143,789	1.9
Sheppard Lansing Area	9	1.0	504	0.2	5,806	0.1
Sheppard West/Dublin	10	1.1	1,108	0.4	5,060	0.1
Swansea	4	0.5	1,831	0.6	9,430	0.1
Unilever Precinct	2	0.2	0	0.0	926,961	12.2
University of Toronto	20	2.3	1,837	0.6	117,692	1.5
Warden Woods	5	0.6	1,113	0.4	10,317	0.1
Yonge Eglinton	94	10.7	28,186	9.4	245,817	3.2
Yonge St. Clair	21	2.4	3,980	1.3	53,476	0.7
York University	9	1.0	860	0.3	48,642	0.6

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

1) Development projects with activity between January 1, 2016 and December 31, 2020. 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.

2) 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.

3) 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.

4) Revised Yonge Eglinton Secondary Plan geography shown on Map 5 has been approved by City Council and, since the *How Does the City Grow? Update 2019* publication, has been approved by the Minister of Municipal Affairs and Housing.

The Rail Deck Park Secondary Plan applies to the land within the rail corridor between Bathurst Street and Blue Jays Way, and directly adjacent city-owned properties. This includes Northern Linear Park and the planned Mouth of the Creek Park. The total area of the Rail Deck Park Secondary Plan is 8.8 hectares. Official Plan Amendment (OPA) 395 was appealed to the LPAT and was subsequently upheld by the LPAT on July 11th, 2019. Within a portion of the Secondary Plan area bounded by Front Street West between Spadina and Bathurst; Blue Jays Way; Ice Boat Terrace; and Bathurst Street, a single project is proposed. The proposal is to develop a rail corridor overbuild (deck) over the existing active rail corridor to accommodate development, while maintaining the rail activities. The ORCA project proposes a mixed-use and open space development, consisting of 10 buildings with 3,500 residential units and 157,700 m² of non-residential GFA proposed. The project was submitted on May 23rd, 2017; appealed to the LPAT on December 6th, 2017; refused by City Council on February 1st, 2018 at the Preliminary Report stage; and approved by the LPAT on May 12th, 2021. This project is discussed above as the third largest non-residential project in the Downtown and Central Waterfront under review.

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. The area, which includes Liberty Village and the Centre for Addiction and Mental Health (CAMH) Queen Street West site, contains 4% of the proposed residential units and 4% of the proposed non-residential GFA in all Secondary Plan Areas.

The Etobicoke Centre Secondary Plan area is achieving its objective as the "urban focal point for the western part of the City".⁹ Etobicoke Centre has seen the most development out of all of the Secondary Plans in Etobicoke and York in terms of the number of projects (23), the number of proposed residential units (11,236), and the amount of proposed non-residential GFA (114,530 m²). The City has almost completed reconstruction of the Six Points intersection at Kipling Ave, Dundas St W, and Bloor St W to support the development of Etobicoke Centre as a vibrant mixed-use transit-oriented community.¹⁰ This new road reconfiguration will make new land available for a new civic centre, recreation centre, library, child care facility and private development. With the new Etobicoke Civic Centre being proposed in 2020 among other projects, the non-residential GFA proposed for the area has more than doubled since the last Pipeline.

Scarborough Community Council area has a large amount of non-residential development within a number of Secondary Plan areas. In the Agincourt Secondary Plan area, nine projects are collectively proposing 81,872 m² of non-residential GFA combined. A student residence and the Instructional Centre, Phase 2, at the University of Toronto Scarborough Campus are larger institutional projects proposed within the Highland Creek Secondary Plan area which has 13 proposed projects. The Scarborough Centre Secondary Plan area contains nine projects proposing 61,264 m² of non-residential GFA including retail, office and transit uses. Lastly, the Morningside Heights Secondary Plan area has attracted a large project proposing 30,996 m² of industrial uses, a warehousing/distribution facility. These large projects show the importance of Secondary Plans in directing and managing non-residential growth throughout the city.

North York Centre Secondary Plan area represents significant development activity in the North York Community Council Area. There are 36 development projects proposing 10,539 residential units and 138,945 square metres of non-residential GFA. The Sheppard East Subway Corridor Secondary Plan area has also attracted a significant amount of development, with 43 development projects representing 5% of all secondary plan area development projects, 15,319 residential units and 143,789 m² of non-residential development proposed. The Downsview Area Secondary Plan area contains a phased project known as Stanley Greene proposing mainly townhouses and apartment buildings with some single-detached homes, and also includes 76,989 square metres of non-residential GFA.

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".¹¹ In 2011, the City commenced its Municipal Comprehensive Review (MCR) of employment lands as required by the *Places to Grow Act*¹² with Council's adoption of Official Plan Amendment 231 (OPA 231)¹³ which received Ministerial approval in part with minor modifications in July 2014. *A Place to Grow*, the new Growth Plan for the Greater Golden Horseshoe, came into force in 2019 and was amended on August 28, 2020 with changes to the forecasts, the horizon year and specific policies. The City Planning Division has commenced a new conformity exercise with a deadline of July 1st, 2022.

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 in 2014. On January 30th, 2020, the LPAT issued its decision on the Council adopted policies related to Employment Area conversions. The LPAT decided in favour of the City's position that the City's Employment Areas are a finite land resource that should be preserved and protected for the long-term. The LPAT decision put into place a policy framework intended to provide a level of land use certainty that can help businesses make long-term investment decisions that support the city's economy and provide a diverse range of jobs.

Development in Employment Areas

The Development Pipeline covers development activity during the years 2016 to 2020. 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.¹⁴ The Manufacturing and Warehousing category declined by 5.3% or 7,270 jobs in 2020 in part due to the impacts of the COVID-19 pandemic. However, this category actually experienced less change relative to the other employment categories and was only outperformed by the Office category. The Provincial Government classified industries such as manufacturing, food retail, and pharmacy as essential businesses at the onset of the pandemic. Only these essential businesses were permitted to operate at that time. While Manufacturing has experienced a long-term decline over the past thirty-five years, the majority of that decline occurred prior to 2009. The category experienced positive growth from 2014 to 2019, adding 10,150 jobs or 8% over that period. Employment Areas are particularly important to the Manufacturing sector with approximately 4 out of 5 Manufacturing establishments and 88% of all Manufacturing jobs located in Toronto's Employment Areas.¹⁵

The protection and enhancement of Employment Areas is vital to the city's economic health. Employment Areas contained 3,816,298 m² or 30% of the city's proposed non-residential GFA from 2016 to 2020 (see Table 12 and Maps 6 and 7 on pages 32 and 33). By 2020 year-end, 28% of these projects had been built, which amounts to 730,636 m² of new non-residential floor space in 77 different development projects.

As development progresses on projects that have been approved, another 1,944,893 m² of non-residential GFA in 105 projects is expected to be constructed in Employment Areas.

A further 91 projects with 1,140,769 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 Downtown, the Centres, the 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 93%.

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

Table 12: Proposed Development in Employment Areas by Status

	Projects		Proposed Non-Residential Gross Floor Area (m ²)		
	Number	Percent	Number	Percent	
City of Toronto	2,114		12,853,823	100.0	
Total Employment Areas	273	100.0	3,816,298	29.7	100.0
Built	77	28.2	730,636	19.1	
Active	105	38.5	1,944,893	51.0	
Under Review	91	33.3	1,140,769	29.9	
Total Employment Areas	273	100.0	3,816,298	100.0	
Core Employment Areas	154	56.4	1,887,533	49.5	100.0
Built	43	27.9	576,924	30.6	
Active	64	41.6	701,714	37.2	
Under Review	47	30.5	608,896	32.3	
General Employment Areas	119	43.6	1,928,765	50.5	100.0
Built	34	28.6	153,712	8.0	
Active	41	34.5	1,243,179	64.5	
Under Review	44	37.0	531,873	27.6	

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

Development projects with activity between January 1, 2016 and December 31, 2020. 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.

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.¹⁶

In Core Employment Areas, the quantity of non-residential GFA proposed between 2016 and 2020 has been increasing in magnitude. 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 Under Review projects in General Employment Areas than Active projects, and more Active projects than Built 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 creation 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 development projects, in particular those that include industrial GFA. The current Pipeline contains more than 1.14 million m² of proposed industrial GFA in Employment Areas (see Table 13). The majority of the industrial GFA in Employment Areas is proposed in Core Employment Areas (81%) while 19% is proposed in General Employment Areas.

In Core Employment Areas, nearly half of proposed GFA is industrial (49%), totaling 928,649 m² (see Table 12 on page 29 and Table 13). Industrial GFA represents about 38% or 718,742 m² of all GFA built and approved in Core Employment Areas over the last five years. An additional 209,907 m² of proposed industrial GFA in Core Employment Areas is under review.

Table 13: Proposed Industrial GFA (m²) in Employment Areas

Area	Built	Active	Under Review	Total in Pipeline	Percent
City of Toronto	235,016	634,962	463,768	1,333,747	100.0
Employment Areas	222,466	570,258	353,525	1,146,249	85.9
Core Employment	216,490	502,252	209,907	928,649	69.6
General Employment	5,977	68,007	143,617	217,600	16.3

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

Development projects with activity between January 1, 2016 and December 31, 2020. 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.