

Toronto's Non-Residential Market

The city's non-residential market, including office, retail, institutional and hotels remained strong during the 2016 to 2020 Development Pipeline period (see Maps 6 and 7 on pages 32 and 33). There was 759,315 m² constructed in projects larger 50,000 m² in the Downtown and Central Waterfront (see Table 10 on page 20). All of these projects were built and ready for occupancy before 2020.

The trend toward significant office construction is continuing. The pursuit of large new projects by applicants points to a continuing demand for non-residential space in the city generally and in Downtown. There is over four times the amount of active non-residential development proposed than what was built in the last five years. A number of large non-residential projects are active or under review. Table 10 (on page 20) 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;
- 1201 Wilson Avenue, which proposed a mix of uses including an expansion of the Humber River Regional Hospital (HRRH), the Forensics Service and Coroners Complex (FSCC), and Provincial office buildings (subsequent phases of development under Provincial approvals are continuing);
- 82 Buttonwood Avenue, a redevelopment of West Park Healthcare Centre campus and other institutional uses;
- 440 Front Street West, "The Well", a redevelopment of the Globe and Mail site with seven mixed use buildings with office and retail uses; and

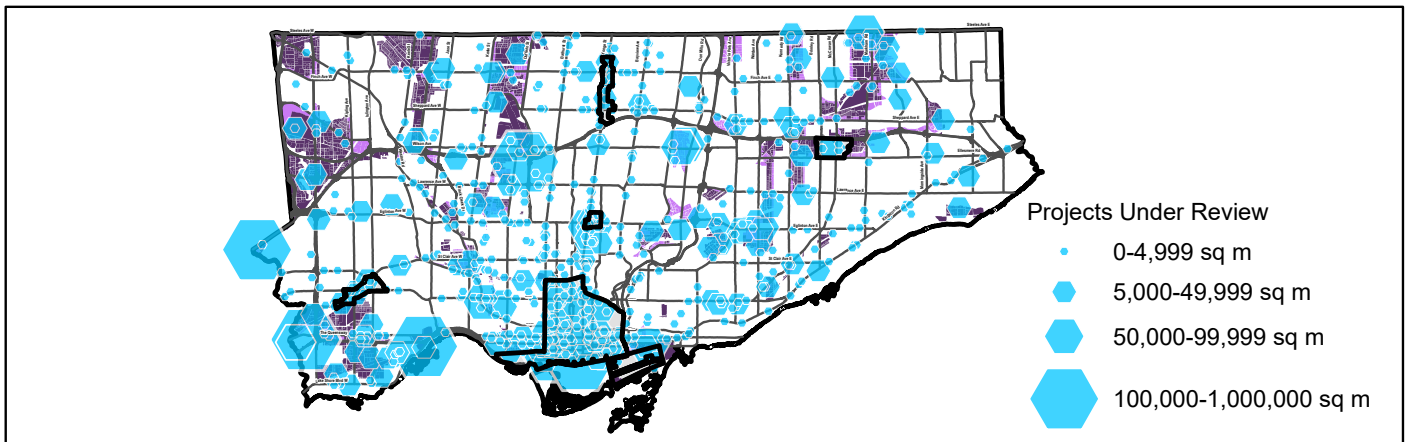
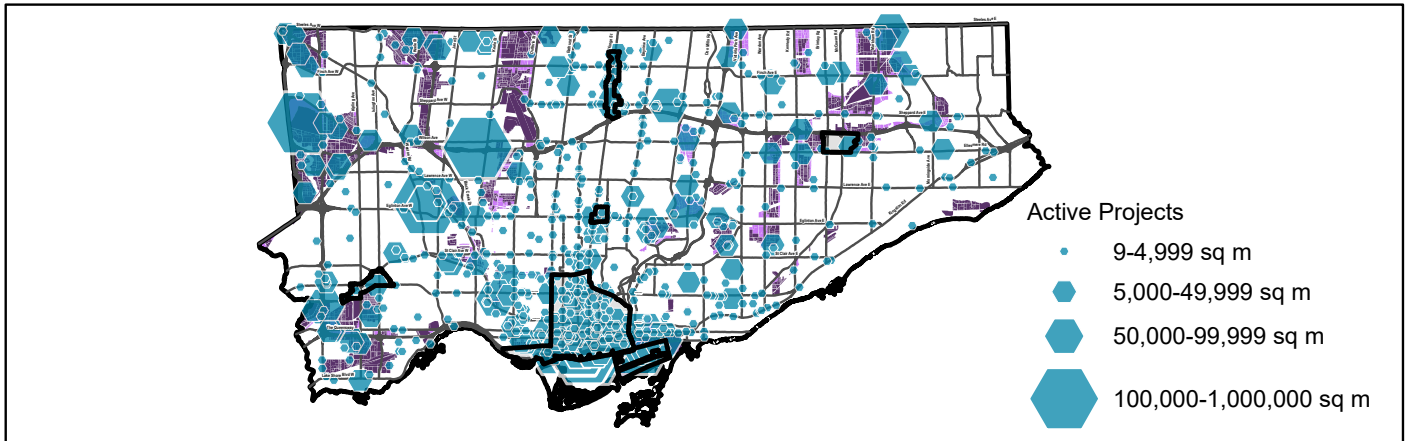
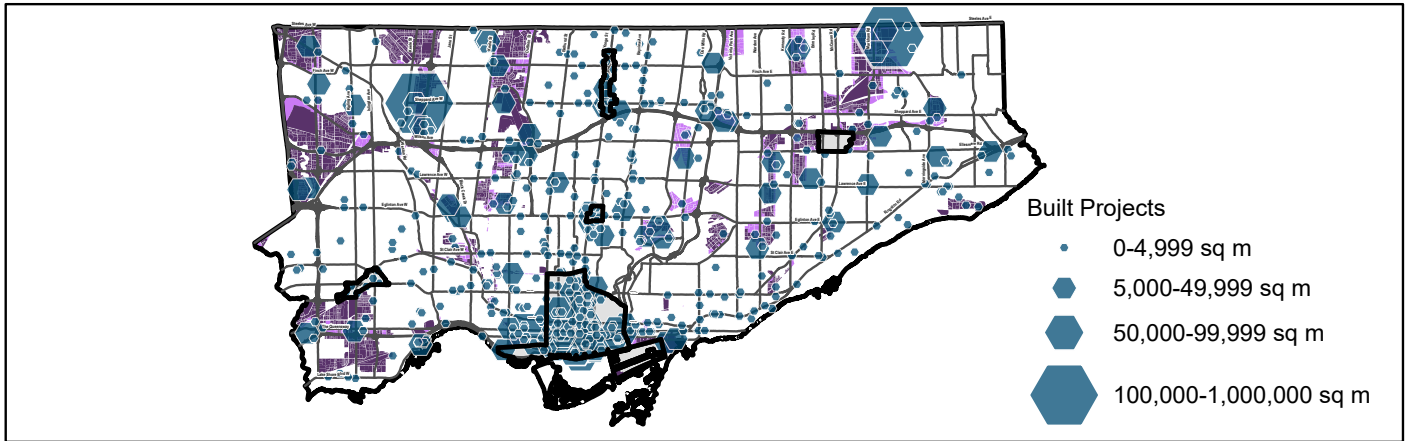
- 45 Bay Street, which includes a major office tower, an elevated park over a rail corridor and the GO bus terminal integrated into the project.

Five Largest Under Review Projects

- 325 Front Street West, a mixed-use development including residential, office and retail uses in four buildings (2 residential and 2 office) and open space uses over the rail corridor;
- 25 King Street West, a 64-storey office-retail building on the Commerce Court site and an addition to Hotel Victoria (approved by Council, appealed to the LPAT which has since been withdrawn);
- 433 Front Street West, the development of ten mixed-use buildings over the rail corridor (refused by Council; appealed to the LPAT);
- 11 Bay Street, a new project proposed in 2020 which proposes a 54-storey office tower with a mixed use podium, including a conference centre associated with the Westin Harbour Castle; and
- 3401 Dufferin Street, a 20+ year phased mixed-use plan for the Yorkdale Shopping Centre site which includes retail, office, hotel, and residential uses.

According to CBRE, Downtown accounts for 99% of the office space currently under construction in the GTA compared to 92% in 2019.^{17,18} Outside of Downtown, the bulk of office space construction is occurring beyond the city of Toronto boundaries within Mississauga (the Airport Corporate Centre) and Burlington.¹⁹

Map 7: City of Toronto Proposed Non-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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Core Employment Areas
 General Employment Areas
 Centres and Downtown & Central Waterfront



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. It manages growth and development throughout the region that stretches around Lake Ontario from Niagara Falls to Peterborough, with Toronto at its centre. On August 28, 2020, the Province released the amended *A Place to Grow*. The amended Growth Plan eliminates the 2031 and 2041 forecast years, replacing them with forecasts at 2051.

The underlying technical forecast study to Amendment 1 was prepared by Hemson Consulting Ltd. and released in August 2020. The 2051 forecasts in the amended Growth Plan correspond to the Reference Scenario in the 2020 technical forecast study. That Scenario has a 2016 population of 2,819,000 and a 2021 forecast population of 3,034,000. If the Reference Scenario is interpolated to 2020, the anticipated 2020 population is 2,991,000.

Statistics Canada's 2020 population estimate as of July 1, 2020 is 2,988,408, just 2,592 below the interpolated forecast. Through the Census, Statistics Canada attempts to count every person. However, some people are missed, and a few are counted more than once. Statistics Canada undertakes follow-up studies to estimate the net undercoverage. The error in the estimated net undercoverage of the Toronto Census Metropolitan Area (CMA) is +/-0.42%. When this error rate is applied to the city of Toronto population, this is an error of +/-11,841 people. Toronto's latest population estimate is well within this error range of the interpolated Growth Plan forecast. Consequently the City's population is on track with the forecasts supporting *A Place to Grow* as amended.

The continuation of the recent growth trends are uncertain due to the COVID-19 pandemic, which has been factored into the 2020 Hemson technical background study supporting the amendment to *A Place to Grow*. The study notes that its forecasts were originally premised on the population of the Greater Golden Horseshoe being consistent with the Ministry of Finance *Population Projections* through the forecast period. However, the study states that the proposed population forecasts were revised with a reduction of approximately 13% growth over the 2016-2021 period and a corresponding decline of 15% in GGH employment in 2020 Q2, with about three-quarters of the job losses anticipated to be recovered by 2021 Census Day. The study states that the long-term effects of the pandemic are very uncertain. According to the results of the 2020 Toronto Employment Survey, the City's employment declined 7.6% from 2019.²⁰ This is half of the anticipated regional decline and outperforms the expectations of the forecasts supporting the Growth Plan.

Employment Forecast

A Place to Grow as amended on August 28, 2020 contains a new forecast horizon of 2051 and a forecast of 1,980,000 jobs by that year. The intervening forecast years were removed from *A Place to Grow*. The Reference Scenario in the technical forecast study supporting the amended Schedule 3 forecast suggests an average annual growth rate of 10,629 jobs per annum from 2016 to 2051.

Each year for the past 37 years, the City Planning Division has conducted the Toronto Employment Survey, collecting employment information from every business establishment in the city. As an establishment based-survey, the Toronto Employment Survey does not capture all people working at home or from 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 results of the Toronto Employment Survey, over the “pre-pandemic” ten-year period 2009 to 2019, the City’s employment grew by 27,661 jobs per annum. This is 2.6 times the rate of growth anticipated by the forecasts supporting the Growth Plan. Over the ten-year period 2010 to 2020 ending “mid-pandemic”, Toronto’s employment grew by 15,161 jobs per annum, or 1.4 times the rate of growth anticipated by the Growth Plan forecasts. To date, the City is still growing faster than forecast and remains on track to achieve the Growth Plan forecast before 2051.²¹

The medium- and long-term impacts of the COVID-19 pandemic are not yet known. The study supporting the revised forecasts in the amended Growth Plan states that the forecasts incorporate a severe economic contraction in 2020 while anticipating a return to pre-pandemic expectations within three years. Nevertheless, the study observes that the pandemic has the potential to affect the assumptions of the forecast, requiring ongoing monitoring.

Housing Forecast

Toronto’s housing growth is also on track with the household forecasts supporting *A Place to Grow* as amended in 2020. The Growth Plan as amended is supported by a technical forecast study by Hemson Consulting Ltd also completed in 2020. The Reference Forecast of that study anticipates 495,000 households need to be accommodated over the forty-year period from 2011 to 2051.

In order to accommodate the additional households, additional housing must be built. To realize this additional housing, some existing housing may need to be demolished. Based on an analysis of Demolition Permits over the 16-year period 2005-2020, the overall average annual demolition rate versus housing units completed over the same period as reported by CMHC was 8.9% (see pages 8-9). The demolition rate can be applied to the potential housing supply to estimate the net supply (see Table 14).

Just nine years into the forty-year forecast period, Toronto has seen built or proposed almost enough potential housing less estimated demolitions to accommodate the forecasted growth to 2051. CMHC reports that 127,481 units were completed between May 2011 and April 2020 for a net total of 116,135 units. The Development Pipeline contains 162,757 units in projects with their first Planning approval but not yet built. If realized, the estimated net new supply would be 148,272 units. Together this is 53% of the net units required to accommodate the forecasted growth over forty years. A further 246,769 units are in development projects still under review for an estimated added net supply of 224,807 units or a further 45% of the forecasted growth. Together this represents almost 99% of the units required to accommodate the forecasted household growth to 2051 (see Figure 5 on page 36). Not all submitted proposals are approved, and not all approved projects are built. However, given these trends, Toronto is well on its way to housing the population forecasted by *A Place to Grow* as amended.

Table 14: Growth Plan Forecast

		Potential Supply (Units)	%	Potential Supply Less Estimated Demolitions	%
Hemson Forecast	2011 - 2051	495,800	100.0	495,800	100.0
CMHC Completions	2011 - 2020	127,481	25.7	116,135	23.4
Active Units	2016 - 2020	162,757	32.8	148,272	29.9
Under Review Units	2016 - 2020	246,769	49.8	224,807	45.3
Total Units		537,007	108.3	489,213	98.7
Additional Potential / Shortfall		41,207	8.3	-6,587	-1.3

Sources: City of Toronto, City Planning Division: Integrated Business Management System; Land Use Information System II; Canada Mortgage and Housing Corporation: Housing Now, GTA Edition tables.

Based on development projects with activity between January 1, 2016 and December 31, 2020 less estimated demolitions using a demolition rate of 8.9% based on Demolition Permits issued 2005-2020 versus CMHC Completions over the same period. 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, but are not yet built. Projects Under Review are those which have not yet been approved or refused and those which are under appeal.

Potential Population

There are 148,272 net units which are approved but not yet built in the Development Pipeline after accounting for estimated demolitions to realize them. If these units were completed and occupied at the average number of persons per household of units built in the last twenty years, 1996 to 2016, the potential population in these units could be about 259,900 people. In addition to Statistics Canada’s 2020 population estimate for the city of 2,988,408, this could bring the city’s population to 3.25 million or 89% of the forecasted population at 2051. If the 224,807 net units which were still under review at the end of 2020 were also approved, built and similarly occupied (already having accounted for estimated demolitions), the potential population in these additional units could be about 394,100 people.

In total, the Development Pipeline could represent a potential population of 654,000 people. This would be the

equivalent of growing the population by over one fifth. Added to the 2020 population estimate, the Pipeline would contribute to a city population of about 3.642 million or 99.8% of the 2051 population forecast of 3.650 million contained in the Provincial Growth Plan as amended.

Density of Jobs and People in Growth Areas

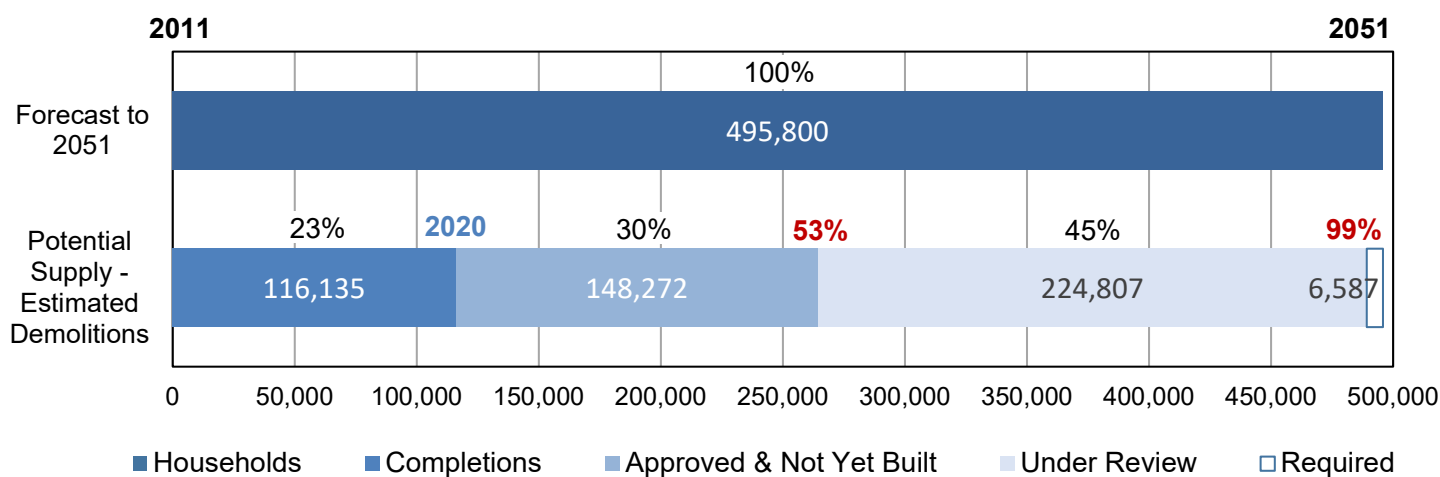
Toronto’s Official Plan seeks to direct growth to the Centres and Downtown “in order to promote mixed use development to increase opportunities for living close to work and to encourage walking and cycling for local trips.”

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 15 shows the density of people and jobs per hectare for Downtown and each Centre between 2006 and 2019, and for the city overall. Since 2006, each of these areas has become steadily denser. 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. In 2020, total employment was lower than in 2019 due to the initial impacts of the COVID-19 pandemic. As a result, the estimated densities in 2020 are lower than they were in 2019. Nevertheless, Table 15 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 2020 density of the Downtown UGC area is estimated to be 366 people and jobs per hectare. According to the Census, the Downtown UGC

Figure 5: Growth Plan Forecast to 2051

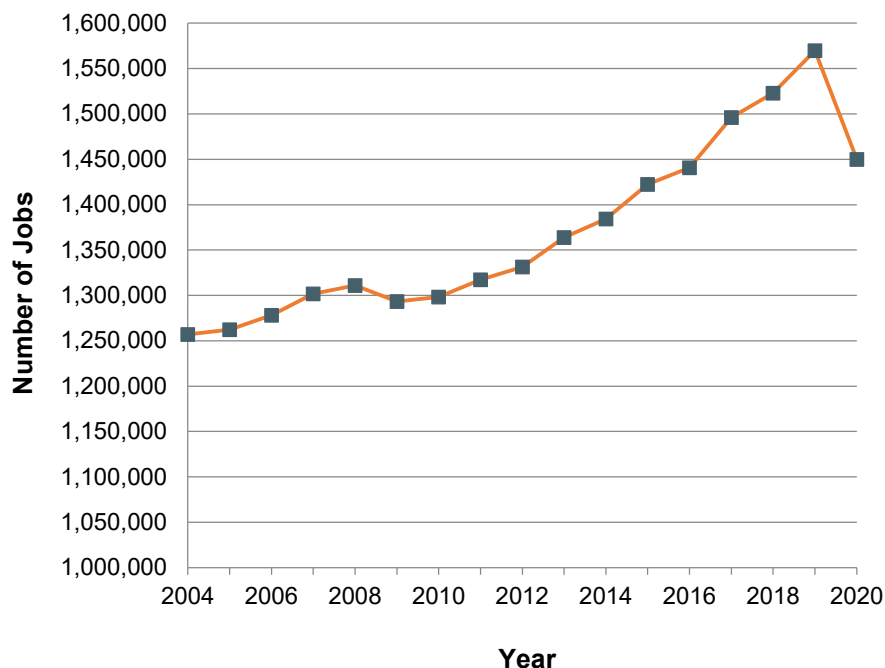


Sources: City of Toronto, City Planning : Integrated Business Management System; Land Use Information System II; Canada Mortgage and Housing Corporation: Housing Now, GTA Edition tables.

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population increased by 41,668 people between 2011 and 2016 or 19.4 persons per hectare. According to the City's Toronto Employment Survey, the employment increased by 95,390 jobs between 2011 and 2020 (see Figure 6) or 44.4 jobs per hectare. The increase in density as a result of this growth is a minimum of an additional 63.8 people and jobs per hectare over the nine-year period 2011-2020, a per annum rate of at least 8.8 people and jobs per year. If the current trends continued for another 4 years after 2020, the additional density would yield a total of 402 people and jobs per hectare in 2024, exceeding the minimum Urban Growth Centre density target well before 2031. The timing of the city's growth will be affected by its recovery from the impacts of the COVID-19 pandemic.

Figure 6: City of Toronto Employment Survey



Source: Toronto City Planning, Toronto Employment Survey

Table 15: Density of People and Jobs Per Hectare in Urban Growth Centres

Measure	Density (People and Jobs Per Hectare)					Percent Change in Density	Percent Change in Density
	Year	2006	2011	2016	2019	2020	2006-2019
Scenario	Actual	Actual	Actual	Estimate	Estimate	Population Change	Population Change
City of Toronto	60	62	66	68	66	14%	11%
Urban Growth Centres							
Downtown and Central Waterfront Centres	265	302	354	388	366	47%	38%
Etobicoke Centre	137	144	155	164	158	20%	16%
North York Centre	385	455	450	460	454	19%	18%
Scarborough Centre	138	156	169	171	163	24%	18%
Yonge-Eglinton Centre	482	570	575	595	574	23%	19%

Sources: City Planning, Land Use Information System II. City Planning, Toronto Employment Surveys 2006, 2011, 2016, 2019, 2020. Statistics Canada, 2006, 2011 and 2016 Censuses, custom tabulations.

The 2006, 2011 and 2016 numbers were calculated based on employment values from the Toronto Employment Survey and population values from the latest Census. The 2019 and 2020 figures include the 2016 Census and the 2019 and 2020 Toronto Employment Survey results respectively.

Provincially Significant Employment Zones in Toronto

The Province brought into effect *A Place to Grow: Growth Plan for the Greater Golden Horseshoe* on May 16, 2019 which included a framework for Provincially Significant Employment Zones (PSEZs). This Growth Plan and this framework were amended August 28, 2020 based, in part, on recommendations from municipalities.

PSEZs are intended to be areas of high economic output, and are strategically located to provide stable, reliable employment across the region. They provide opportunities to improve coordination between land use planning, economic development, and infrastructure investments to support investment and job creation over the longer-term. The Growth Plan (2019) defines PSEZs as:

Areas defined by the Minister in consultation with affected municipalities for the purpose of long-term planning for job creation and economic development. *Provincially significant employment zones* can consist of *employment areas* as well as mixed-use areas that contain a significant number of jobs.

Municipalities are only able to convert lands within PSEZs and non-PSEZs (all Employment Areas outside of the PSEZ geography) to permit non-employment uses provided that a number of “tests” set out in the Growth Plan (2019) are met (see Growth Plan Policies 2.2.5.9 and 2.2.5.10). The City of Toronto Official Plan consists of additional conversion “tests” that are required to be satisfied as well.

There are currently 29 PSEZs in the region and 11 PSEZs fall within the City of Toronto as identified by the Minister on December 20, 2019. The Ontario Food Terminal was the most recent PSEZ accepted by the Province and one of the City’s recommendations.

There are 177 proposed projects located within the identified 11 PSEZs in Toronto. Of these, 96 projects are within the land use designation *Core Employment Areas* and 56 projects are within the *General Employment Areas*. The remaining 25 projects in PSEZs are located within other land use designations. The Province may continue to modify the PSEZ geographies (see Map 8) and Table 16 is based on the most recent geographies available at the time of this bulletin.

Table 16: Development Projects in Provincially Significant Employment Zones (PSEZs)

	PSEZ	Not in PSEZ	Total	% in PSEZ	% Not in PSEZ
Core Employment Areas	96	58	154	62%	38%
General Employment Areas	56	63	119	47%	53%
Other Areas within City	25	1,816	1,841	1%	99%
Total Projects in Pipeline	177	1,937	2,114	8%	92%

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.

COVID-19: Rebuild and Recover

In response to the COVID-19 global pandemic, the City of Toronto closed its offices effective March 18, 2020. Despite this, the City of Toronto remained deeply committed to public service. It quickly adapted by rolling out remote work and resuming services. Both the City Planning and Toronto Building Divisions continued accepting Planning and Building Permit applications, approving planning proposals, issuing building permits, and performing final inspections of completed construction.

In 2020, City Planning received applications for 242 development projects proposing 70,851 residential units and 1,279,479 m² of non-residential GFA. By comparison to the 211 projects proposed in 2019, 16% more residential proposals and 20% fewer non-residential projects were submitted in 2020. Even though City Planning was not able to accept new applications for several weeks at the onset of the pandemic, it received 40%

of the year's total by the end of June, compared to 33% in 2019 (see Table 17 and Figure 7). The comparatively high number of development proposals submitted in 2020 shows continuing confidence in development in Toronto in the foreseeable future, especially in the residential market.

In the early months of the pandemic, City Planning pivoted its focus by prioritizing approvals of affordable and modular housing, as well as condominium applications and other applications that were close to approval. The number of development projects that received at least their first Planning approval in 2020 was 110, a decrease from 155 projects in 2019. The 110 approved projects consisted of 21,318 residential units and 473,644 m² of non-residential GFA. The average number of projects approved per month in 2019 and 2020 were 8.9 and 7.6 respectively. One of the major contributing factors to the decrease in approvals was the cancellation of City Council and Committee meetings between March and May in 2020. Also, the City Planning

Table 17: Development Projects Received 2019-2020

Month	2019		2020	
	Projects	%	Projects	%
January	6	3%	6	2%
February	15	7%	20	8%
March	18	9%	14	6%
April	9	4%	0	0%
May	12	6%	13	5%
June	10	5%	43	18%
July	19	9%	18	7%
August	23	11%	13	5%
September	12	6%	20	8%
October	30	14%	28	12%
November	21	10%	22	9%
December	36	17%	45	19%
Total	211	100%	242	100%

Division and a few other City Divisions that provide development review support experienced critical staffing shortages for much of 2020, impacting development review timelines.

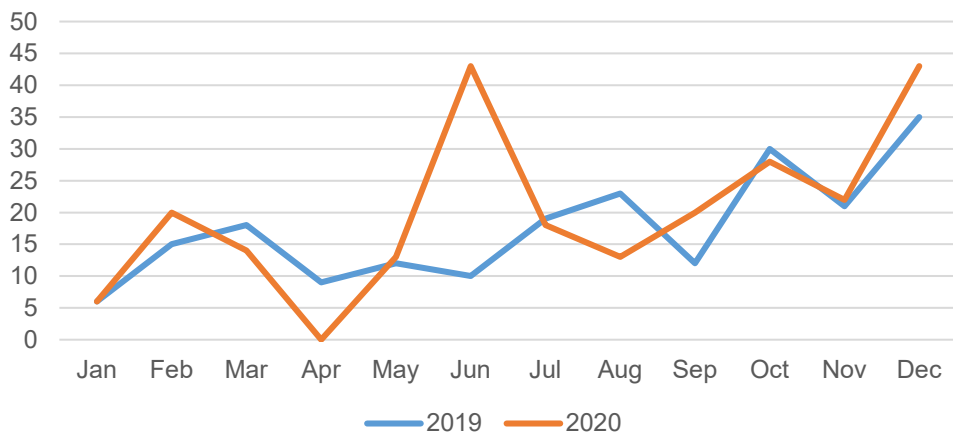
The pandemic did not slow construction activities across the city as residential and some non-residential construction was deemed an essential service by the Province of Ontario. According to CMHC, 20,982 residential units began construction and 56,005 units were under construction in 2020. This is 11% and 7% higher respectively than the 18,877 units that began construction and the 52,317 units that were under construction in 2019. The Toronto Building Division issued 9,717 Building Permits comprising 25,258 residential units in 2020, while 11,636 Building Permits with 12,002 residential units were issued in 2019.

CMHC reports 17,276 residential units were completed in 2020 and the Development Pipeline similarly captured 16,823 units that were built in the same year. Over the five-year period

from 2016 to 2020, CMHC reports 78,513 completed residential units. The Development Pipeline similarly captured 75,510 units that were built during this period. The difference in these numbers is due to methodology. CMHC surveys construction sites while City Planning defines built residential units as those which have reached the stage of Ready for Occupancy and/or Work Completed based on Building Permits. While the methodologies used by CMHC and City Planning differ, the number of built residential units are closely comparable.

The COVID-19 pandemic has not deterred development activity in 2020, especially in residential projects. However, many of these projects might have been pre-sold and were advancing through the development process before the pandemic hit Toronto. Ongoing monitoring of development activities will be necessary to assess the long-term impact of the pandemic and the progress of the economic recovery.

Figure 7: Development Projects Received 2019-2020



Mixed Use Heritage Conservation Districts

As Toronto grows and changes, historic buildings play a crucial role in place-making. The mix of historic and modern plays a key role in attracting the innovation and investment that supports our economy.

The City of Toronto has been designating HCDs since 1985 and in 2015, new Official Plan heritage policies came into effect. Council signaled a commitment to HCDs, providing place-based policies that conserve and enhance storied neighbourhoods, while pointing to opportunities for contextually appropriate growth and change that build on what makes Toronto a unique, competitive and livable city.

Far from being static, HCDs in Toronto continue to evolve and accommodate change in the form of sensitive additions, new development, increased density, new businesses and new residents. A review of the development projects within HCDs between January 1, 2016 and December 31, 2020 highlights that non-residential gross floor area (GFA) has been growing over the past five years and shows how it will continue to develop in the near future within HCDs. About 14% of the proposed non-residential GFA in the City is located in an HCD, demonstrating that City Planning and its private sector partners are finding innovative new opportunities for responsive design interventions within Toronto's historic neighbourhoods.

Table 18a: Proposed Development by Mixed Use Heritage Conservation District

Geography	Number of Projects	% of Total	% in HCDs	Proposed Residential Units	% of Total	% in HCDs	Proposed Non-Residential GFA (m ²)	% of Total	% in HCDs
City of Toronto	2,114	100.0		503,362	100.0		12,853,823	100.0	
<i>Heritage Conservation Districts</i>	122	5.8	100.0	37,746	7.5		1,825,151	14.2	100.0
Mixed Use Designated Districts	22	1.0	18.0	5,094	1.0	13.5	980,289	7.6	53.7
Queen Street West	8		6.6	751		2.0	23,058		1.3
Union Station	14		11.5	4,343		11.5	957,231		52.4
Mixed Use Districts Under Appeal	100	4.7	82.0	32,652	6.5	86.5	844,862	6.6	46.3
Garden District	4		3.3	943		2.5	45,408		2.5
Historic Yonge Street	16		13.1	7,628		20.2	50,522		2.8
King-Spadina	66		54.1	20,636		54.7	540,561		29.6
St. Lawrence Neighbourhood	14		11.5	3,445		9.1	208,371		11.4

Of the 1,825,151 m² of proposed non-residential GFA in the Downtown *Mixed Use* HCDs, 980,289 m² or 8% of proposed non-residential GFA in the city is found in the Union Station and Queen Street West HCDs, which have been in effect since 2006 and 2007, respectively. Meanwhile, 844,862 m² or 7% of proposed non-residential GFA in the city is located in Historic Yonge, St. Lawrence Neighbourhood, Garden District and King-Spadina HCDs, which are all under appeal at this time (see Map 9 on page 44 and Tables 18a and 18b).

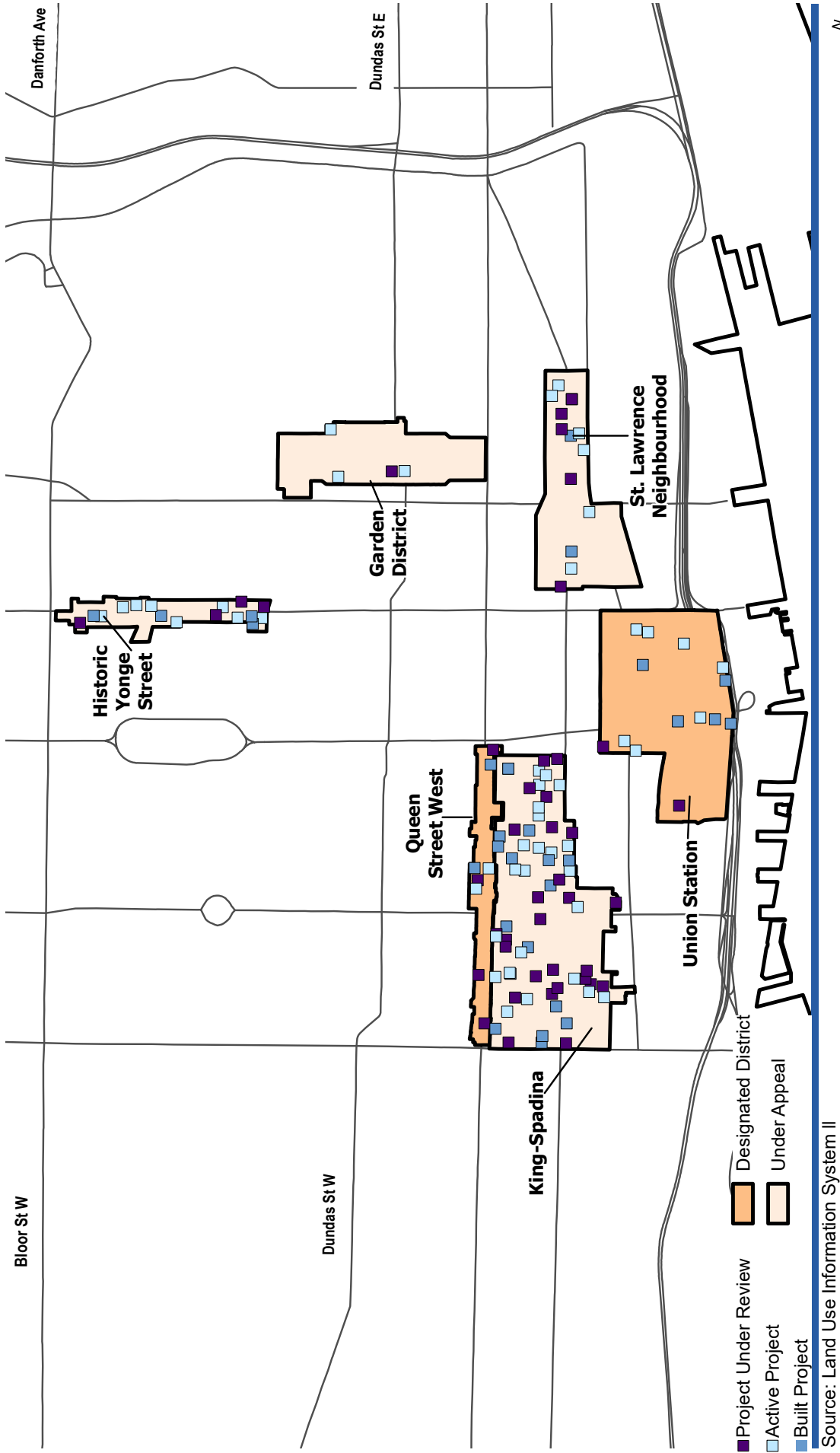
This development activity aligns with the understanding that the lands within several of these HCDs are located within an Urban Growth Centre pursuant to the Provincial Growth Plan

2020, and Policy 4.2.7(1) provides that cultural heritage resources will be conserved, particularly in *strategic growth areas*. These HCD Plans also take into account the municipal land use planning framework, with a view to establishing Plans that will remain relevant and attuned to core principles of cultural heritage. HCD Plans are to be read in conjunction with the Official Plan, which gives further direction on the management and conservation of heritage properties. This snapshot of the Pipeline is encouraging and shows that growth and heritage conservation are not mutually exclusive. Conservation or alteration of heritage resources can help to shape change, not prevent non-residential development.

Table 18b: Proposed Development in Mixed Use Heritage Conservation Districts by Status

Geography	Number of Projects	% of Total	% in HCDs	Proposed Residential Units	% of Total	% in HCDs	Proposed Non-Residential GFA (m ²)	% of Total	% in HCDs
City of Toronto	2,114	100.0		503,362	100.0		12,853,823	100.0	
<i>Heritage Conservation Districts</i>	122	5.8		37,746	7.5		1,825,151	14.2	
Mixed Use Designated District	22	1.0	18.0	5,094	1.0	13.5	980,289	7.6	53.7
Built	7		5.7	3,719		73.0	219,224		22.4
Active	9		7.4	408		8.0	739,932		75.5
Under Review	6		4.9	967		19.0	21,134		2.2
Mixed Use Districts Under Appeal	100	4.7	82.0	32,652	6.5	86.5	844,862	6.6	46.3
Built	24		19.7	7,959		21.1	118,392		6.5
Active	40		32.8	14,083		37.3	340,829		18.7
Under Review	36		29.5	10,610		28.1	385,641		21.1

Map 9: Proposed Development in Mixed Use Heritage Conservation Districts



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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Appendix

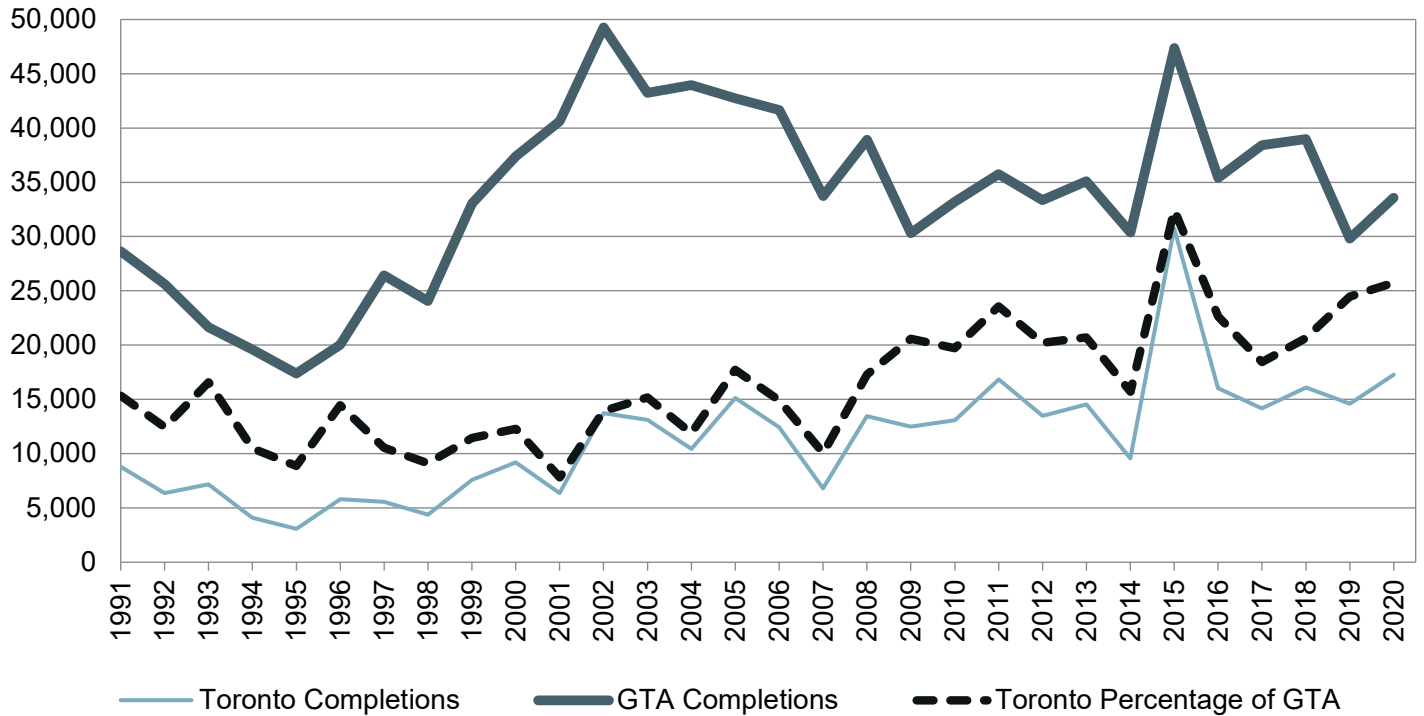
Table A.1: Average Project Size by Status

<i>Average Number of Residential Units per Project</i>					
	Built	Active	Under Review	Total in Pipeline	2019 Q4
City of Toronto	161	215	319	238	206
<i>Growth Areas</i>	249	309	399	329	295
Downtown and Central Waterfront	342	354	326	340	331
Centres	327	568	561	496	453
Avenues	163	174	323	232	198
Other Mixed Use Areas	201	431	643	454	368
All Other Areas	41	60	161	87	71
<i>Average Non-Residential Gross Floor Area per Project (m²)</i>					
	Built	Active	Under Review	Total in Pipeline	2019 Q4
City of Toronto	4,133	7,357	6,303	6,080	5,722
<i>Growth Areas</i>	4,101	6,610	6,440	5,907	5,737
Downtown and Central Waterfront	7,592	12,430	10,435	10,440	10,193
Centres	2,575	4,180	4,853	4,004	3,281
Avenues	1,540	1,523	3,052	2,145	1,899
Other Mixed Use Areas	3,043	6,715	7,636	6,112	5,972
All Other Areas	4,176	8,590	6,034	6,368	5,700

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

Proposed residential units 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.

Figure A.1: Toronto & GTA Dwelling Unit Completions



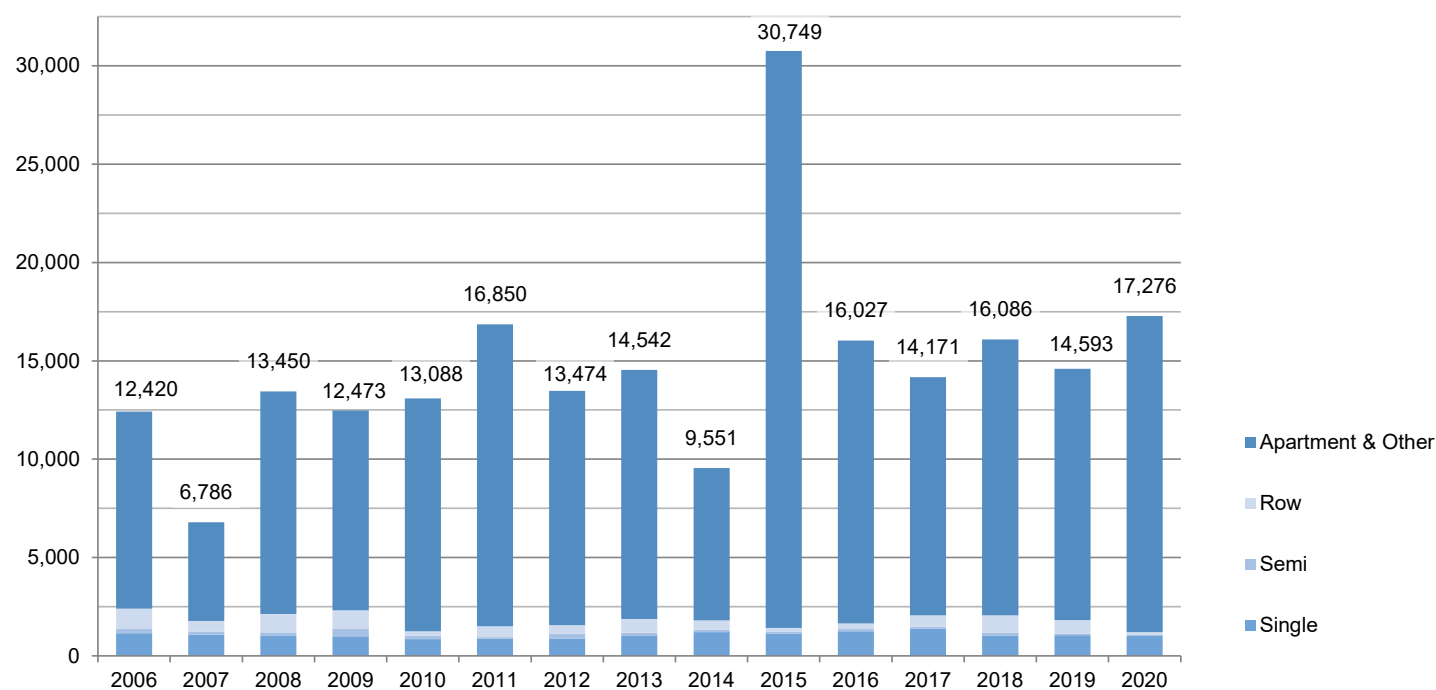
Source: Canada Mortgage and Housing Corporation, Housing Now - Ontario Reports

Table A.2: Residential Unit Completions by Dwelling Type

Market	Single	Semi	Row	Apartment & Other	Total
2006	1,148	221	1,027	10,024	12,420
2007	1,085	142	552	5,007	6,786
2008	1,008	178	944	11,320	13,450
2009	987	408	919	10,159	12,473
2010	849	166	230	11,843	13,088
2011	865	82	558	15,345	16,850
2012	877	230	457	11,910	13,474
2013	1,013	172	685	12,672	14,542
2014	1,205	136	456	7,754	9,551
2015	1,124	106	193	29,326	30,749
2016	1,250	108	296	14,373	16,027
2017	1,384	92	577	12,118	14,171
2018	1,039	140	876	14,031	16,086
2019	1,057	66	701	12,769	14,593
2020	1,009	70	124	16,073	17,276
Avg 10 years	1,082	120	492	14,637	16,332
Percentage	6.6%	0.7%	3.0%	89.6%	100.0%

Source: Housing Now publications, Canada Mortgage and Housing Corporation

Figure A.2: Residential Unit Completions by Dwelling Type



Source: Housing Now publications, Canada Mortgage and Housing Corporation

Table A.3: Completions by Submarket and by Intended Market

Toronto City	Freehold	Condo	Rental	Total	Condo %
2007	1,524	4,690	572	6,786	69%
2008	2,071	10,058	1,321	13,450	75%
2009	2,231	9,322	920	12,473	75%
2010	1,286	10,923	879	13,088	83%
2011	1,449	14,568	804	16,850	86%
2012	1,528	9,961	1,985	13,474	74%
2013	1,735	11,126	1,681	14,542	77%
2014	1,573	7,777	201	9,551	81%
2015	1,368	28,017	1,364	30,749	91%
2016	1,505	13,428	1,090	16,027	84%
2017	1,849	11,507	815	14,171	81%
2018	1,798	11,816	2,472	16,086	73%
2019	1,559	9,724	3,310	14,593	67%
2020	1,247	13,315	2,714	17,276	77%
Avg 10 yrs	1,561	13,124	1,644	16,332	80%
Percentage	10%	80%	10%	100%	

Source: Housing Now publications, Canada Mortgage and Housing Corporation

Table A.4: Dwelling Unit Completions and Absorptions by Type, City of Toronto

Freeholds				
	Completions	Absorptions	Net Completions	"Unabsorbed" Percentage
2016	1,513	1,464	49	3.3
2017	1,849	1,813	36	2.0
2018	1,798	1,797	1	0.1
2019	1,559	1,506	53	3.5
2020	1,247	1,259	-12	-1.0
Total	7,966	7,839	127	1.6
Condominiums				
	Completions	Absorptions	Net Completions	"Unabsorbed" Percentage
2016	13,426	14,137	-711	-5.0
2017	11,507	12,257	-750	-6.1
2018	11,816	11,947	-131	-1.1
2019	9,724	9,556	168	1.8
2020	13,315	13,204	111	0.8
Total	59,788	61,101	-1,313	-2.1
Purpose-Built Rental				
	Completions	Absorptions	Net Completions	"Unabsorbed" Percentage
2016	1,088	1,028	60	5.8
2017	815	595	220	37.0
2018	2,472	2,111	361	17.1
2019	3,310	2,788	522	18.7
2020	2,714	2,600	114	4.4
Total	10,399	9,122	1,277	14.0

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.

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 For more information, see *Expanding Housing Options in Neighbourhoods* at <https://www.toronto.ca/city-government/planning-development/planning-studies-initiatives/expanding-housing-options/>.
- 4 Canada Mortgage and Housing Corporation, *Housing Now – Greater Toronto Area Reports and custom tabulations*.
- 5 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.
- 6 City of Toronto, City Planning, Official Plan, Downtown Plan Secondary Plan, Policy 2, 2018. <https://www.toronto.ca/wpcontent/uploads/2018/08/966fcity-planning-tocore-opa406-attachment-1-schedule-5-downtown-plan.pdf>.
- 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, Etobicoke Centre Secondary Plan, 2006.
- 10 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/>
- 11 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, [By-Law No. 1714-2013](http://www.toronto.ca/by-law-no-1714-2013).
- 12 Ontario Ministry of Infrastructure, *Growth Plan for the Greater Golden Horseshoe, 2006: Office Consolidation*, June 2013, Policy 2.2.6.5.
- 13 For more information about OPA 231, please visit <http://www.toronto.ca/opreview>.
- 14 Kneebone, Elizabeth (2013) *Job Sprawl Stalls: The Great Recession and Metropolitan Employment Location*, Brookings Institution.
- 15 City of Toronto, City Planning, *Toronto Employment Survey, 2020*.
- 16 City of Toronto, By-Law No. 1714- 2013. Updated to Board order issued December 20, 2016. See: [By-Law No. 1714-2013](http://www.toronto.ca/by-law-no-1714-2013). The permission for all types of retail uses in General Employment Areas is under appeal.
- 17 ‘Downtown’ as defined by CBRE in CBRE Marketview, Toronto Office, Q4 2020 does not correlate to the geography of Downtown and the Central Waterfront as defined by the City of Toronto’s Official Plan.
- 18 CBRE Marketview, Toronto Office, Q4 2020.
- 19 CBRE Marketview, Toronto Office, Q4 2020.
- 20 City of Toronto, City Planning Division (2021). *Toronto Employment Survey 2020*. <https://www.toronto.ca/wp-content/uploads/2021/05/9829-Toronto-Employment-Survey-2020-Bulletin.pdf>
- 21 City of Toronto, City Planning Division (2021). *Toronto Employment Survey 2020*, pp. 30-31. <https://www.toronto.ca/wp-content/uploads/2021/05/9829-Toronto-Employment-Survey-2020-Bulletin.pdf>

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