

This bulletin illustrates how the City has developed and how it may continue to grow over time. It summarizes information from the City of Toronto's Land Use Information System II, providing an overview of all projects with any development activity between January 1, 2011 and December 31, 2015. This development pipeline data is supplemented by other data sources such as CMHC, Statistics Canada and the Toronto Employment Survey.



September 2016

Highlights

Toronto is growing with strong development prospects helping to bring more people and jobs into the City.

- From 2011 to 2015, 311,350 residential units and 7.94 million m² of non-residential GFA were proposed in the City of Toronto.
- 83% of new residential development is proposed in areas targeted for growth by the City's Official Plan.
- 224,700 residential units and 5.26 million m² of non-residential floor space proposed have not yet been built. Toronto will continue to grow as proposed developments receive planning approval and building permits.
- The most growth was proposed in the Downtown & Central Waterfront, with 38% of the units and 46% of the non-residential GFA proposed in the City.
- Among the Centres, Yonge-Eglinton Centre has the most residential activity with 39% of the units proposed in the Centres. North York Centre led non-residential development with 52% of all non-residential activity in the Centres.
- More than 72,800 residential units were proposed along the Avenues identified in the Official Plan.
- 23% of the City's proposed non-residential floor space is in the City's Employment Areas.
- 46% of the proposed residential units are located in an area covered by a Secondary Plan.
- As the City's Urban Growth Centres develop, they are progressing towards meeting the Province's density targets. Most of that density is due to residential growth.

How Does the City Grow?

Introduction

Toronto is Canada's most populous city, the focal point of development and growth, and the heart of 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, which came into force in June 2006, is the guide for development in the City over the next few decades. Its central geographic theme 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 growth are those identified in the Official Plan's Urban Structure Map as Avenues, Centres, the Downtown,¹ as well as other areas in the City designated as Mixed Use Areas and Employment Areas.² The Official Plan's Urban Structure Map is included in this bulletin as Map 1 on page 2.

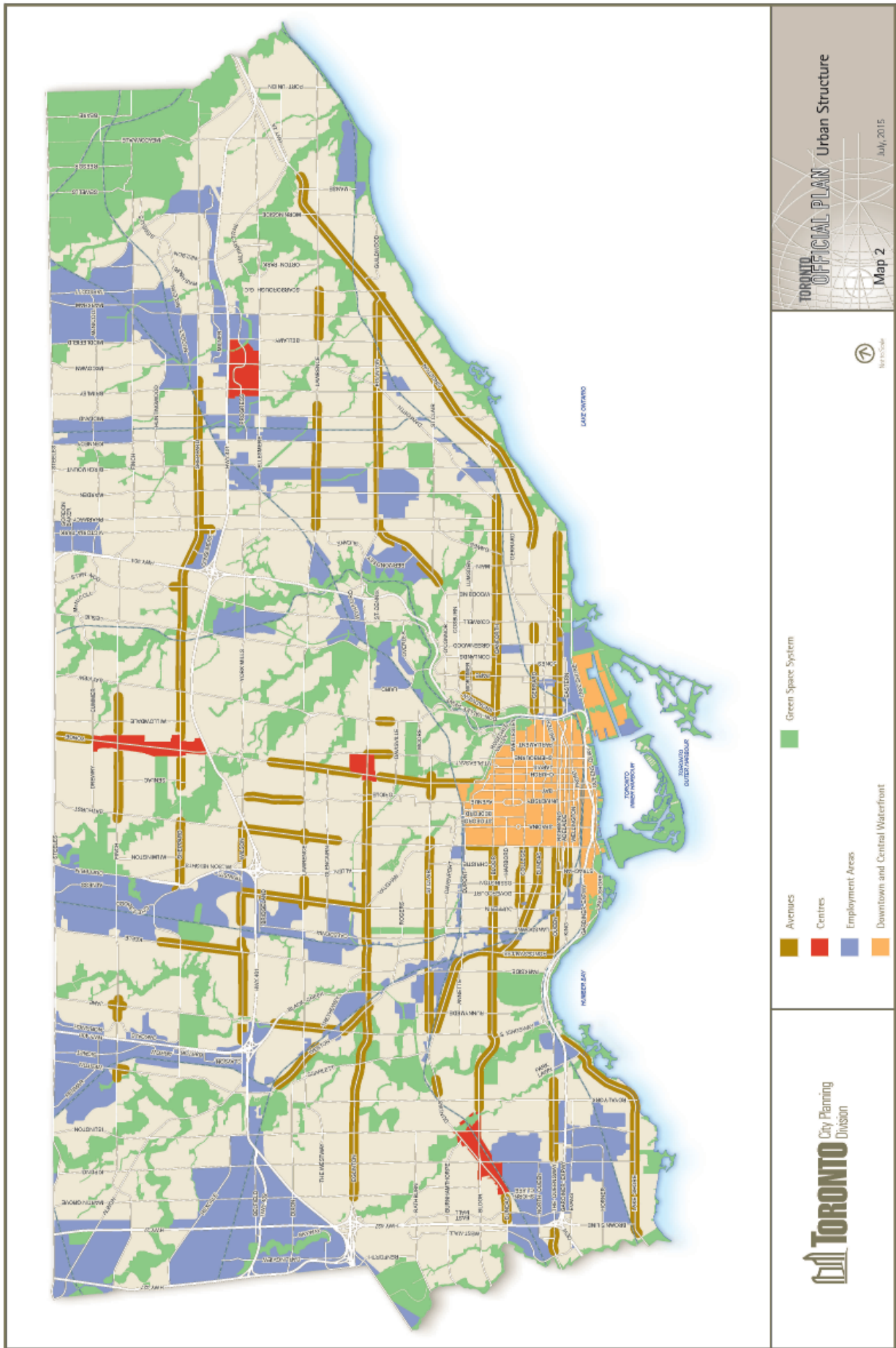
Population and Employment

It is important to understand Toronto's growth in the context of its population and employment. The Growth Plan for the Greater Golden Horseshoe, brought into force by the Provincial Government in June 2006, manages growth and

development throughout the region that stretches around Lake Ontario from Niagara Falls to Peterborough, with Toronto at its centre. The Growth Plan, as amended in 2013, forecasts 3.40 million people and 1.72 million jobs in the City of Toronto by 2041.³

The City's population is on track with the population forecasts in the Growth Plan. The forecast background study supporting the Growth Plan anticipated a 2011 population including Census undercoverage of 2,725,000. The most recent estimate of the City's 2011 population by Statistics Canada is 2,704,622 \pm 14,334.^{4,5} This is close to the forecasted population. Statistics Canada's estimate of the City's 2015 population is 2,826,498. If the forecast supporting the Growth Plan were interpolated to 2015, this would be within the range of error of the Census.

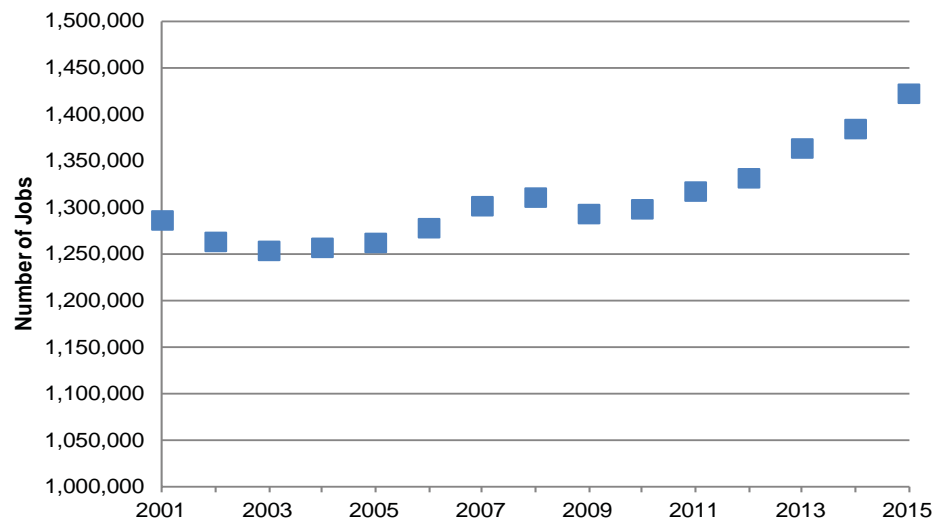
Statistics Canada also reports where people are working. These data include people working at home and those with no usual place of work. Prior to 2011, this information was collected through the long-form Census. In 2011, the voluntary National Household Survey (NHS) was used to collect the Place of Work data. Due to the differences in data collection methods, the NHS data cannot be compared to the Census data. With the return of the long-form Census for the 2016 Census, superior analysis will be possible once results become available in late 2017.



Each year for the past 34 years, the City Planning Division has conducted the Toronto Employment Survey, collecting employment information from each business establishment in the City, a total of 75,710 in 2015. According to the Toronto Employment Survey results as shown in Figure 1, in the five years between 2011 and 2015, an average of 20,990 jobs were added each year. As a survey of business establishments, the Toronto Employment Survey does not capture the growing number of people who work at home nor all of those who do not have usual places of work, e.g. construction workers. Thus, the total employment in the City is higher than reported by the Survey. The results from the Employment Survey demonstrate that employment continues to grow in the City.

On the basis of the Growth Plan forecast background study, Toronto will need to add 6,690 new jobs each year between 2011 and 2041 to reach the Growth Plan forecast.⁶ According to the 2015 Toronto Employment Survey, over the past ten years, the City grew at an average of 14,552 jobs per annum. Over 30 years, this average growth rate would achieve the Growth Plan forecast.

Figure 1: City of Toronto Employment



Source: Toronto Employment Survey, Toronto City Planning Division

Housing in Toronto and the GTA

The City continues to grow. According to the Census, the number of occupied private dwellings increased 68,547 between 2006 and 2011. Canada Mortgage and Housing Corporation (CMHC) reports that 58,074 dwelling units were completed in the City during the same period (May 2006 to April 2011). This does not include demolitions, which would indicate somewhat fewer net new units. The 2011 Census reports more

units occupied than were completed, which suggests that the Census has captured a significant number of dwelling units that may have existed at the time of the 2006 Census but were not classified as “occupied” at that time. This in turn suggests a higher net undercount in the 2006 Census for Toronto than was officially reported and thus a higher actual total population.

The City continues to be an exceptionally attractive location for residential development in the Greater Toronto Area (GTA). According to CMHC, Toronto has represented an average of about 30% of the housing completions in the GTA since 1986 (see Table 1). Toronto’s housing construction has recovered from the low construction levels reported in the mid-1990s and the 2008 global recession (see Figure 2). Last year was a record year for new units. The number of units completed in 2015 was more than double the average number of units completed annually over the past 10 years.

High-density condominium apartments continue to dominate the new construction landscape in Toronto. CMHC recorded 85,166 residential units completed in Toronto between 2011 and 2015 inclusive and 83% of these units were condominium

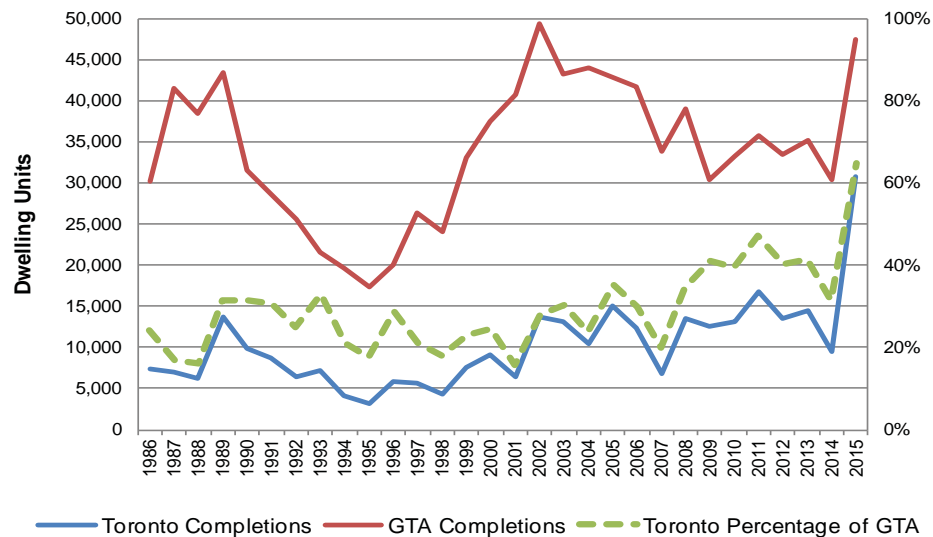
Table 1: Dwelling Completions, Greater Toronto Area

Year	Toronto	GTA	Toronto % of GTA
1986-1990	44,037	184,777	23.8%
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%
Total	308,200	1,018,233	30.3%
Average 1986-2015	10,273	33,941	
Average 2006-2015	14,338	35,978	

Source: CMHC, *Monthly Housing Now - Greater Toronto Area Reports*.

Note: Completions are for whole calendar years.

Figure 2: Toronto & GTA Dwelling Unit Completions



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

apartments, an all-time high in Toronto's development history.⁷ In the GTA outside of Toronto, condominium apartments only comprise 21% of units completed in the last five years.

Toronto's Proposed Development Pipeline

In previous issues of this bulletin, development was reported through the lens of the five-year development pipeline, all applications received within a five-year period. While providing an overview of the near-term housing supply and a consistent window through which to view the ebb and flow in the number of proposals submitted over time, the five-year window is not a complete picture of development activity. Over the past several years there have been fewer projects submitted for approval. However, they represent an increasing number of proposed residential units and larger non-residential gross floor areas. As the projects grow larger on average, they take longer to implement, from application, through approval and to the completion of construction. Many projects received prior to the start of the five-year pipeline window continue to actively progress through the approvals process or undergo construction. These are generally larger or more complex projects which have taken

longer to progress through application review and construction given their size and complexity.

Consequently, in 2016, the parameters of the development pipeline have been changed to provide a better representation of the near-term housing supply. The current development pipeline now consists of all projects with any development activity between January 1, 2011 and December 31, 2015. Development

activity refers to progress at any stage of the approvals and development processes, including application submission, development review, development approval, building permit application, building permit issuance, construction, occupancy, and completion. This produces a more fulsome view of development activity in the city. Previous versions of the pipeline are not directly comparable.

Projects are categorized into three general statuses, based on the stage of development they reached between January 1, 2011 and December 31, 2015. Built projects are those which became ready for occupancy and/or were completed. Active projects are those which have been approved, or for which building permits have been applied or have been issued, and those under construction. Projects under review are those which have not yet been approved or refused, or which are under appeal.

Toronto's development industry is strong and continues to produce new projects. The development pipeline is comprised of 2,362 development projects that were submitted to the City Planning Division for review and

Table 2: Proposed Projects in City of Toronto by Status

	Built	Active	Under Review	Total in Pipeline	% of Total
City of Toronto	1,027	786	549	2,362	
Growth Areas					
Downtown and Central Waterfront	168	134	106	408	17.3
Centres	28	29	18	75	3.2
Etobicoke Centre	6	10	3	19	25.3
North York Centre	15	7	4	26	34.7
Scarborough Centre	4	1	0	5	6.7
Yonge-Eglinton Centre	3	11	11	25	33.3
Avenues	156	143	141	440	18.6
Other Mixed Use Areas	61	83	57	201	8.5
All Other Areas	614	397	227	1,238	52.4

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

Development projects with activity between January 1, 2011 and December 31, 2015. 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 those which are under construction. Projects under review have not yet been approved or refused, or are under appeal.

Table 3: Proposed Residential Units in City of Toronto by Status

	Built	Active	Under Review	Total in Pipeline	% of Total
City of Toronto	86,605	118,610	106,135	311,350	
Growth Areas					
Downtown and Central Waterfront	31,378	50,075	37,700	119,153	38.3
Centres	7,071	12,500	7,621	27,192	8.7
Etobicoke Centre	960	6,196	378	7,534	27.7
North York Centre	4,772	709	2,641	8,122	29.9
Scarborough Centre	947	0	0	947	3.5
Yonge-Eglinton Centre	392	5,595	4,602	10,589	38.9
Avenues	24,469	22,090	26,268	72,827	23.4
Other Mixed Use Areas	7,502	16,357	13,907	37,766	12.1
All Other Areas	16,185	17,588	20,639	54,412	17.5

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

Development projects with activity between January 1, 2011 and December 31, 2015. 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 those which are under construction. Projects under review have not yet been approved or refused, or are under appeal.

approval. These projects contain 311,350 residential units and 7.94 million m² of non-residential Gross Floor Area (GFA).

The majority of the development proposed in the City is occurring in areas that the Official Plan has targeted for growth. Table 2 contains the breakdown of projects proposed in these targeted growth areas by status. Tables 3 and 4 contain the breakdown of residential and non-residential development proposed in each growth area by status. Maps 2 and 3 (on pages 6 and 7) show the distribution of proposed residential developments throughout the City by status. Maps 7 and 8 (on pages 16 and 17) show the distribution of proposed non-residential space.

Figure 3 (on page 8) indicates that 81% of the residential units under review and 85% of active residential units are proposed to be built in the Downtown, in the Centres, along the Avenues, and in other Mixed Use Areas throughout the City. Almost two-thirds (65%) of the non-residential GFA under review and 70% of active non-residential GFA is also proposed in these same areas (see Figure 4 on page 8). Most of the remaining

non-residential GFA is proposed in employment-related lands, which the Official Plan also targets for growth.

The pipeline provides an overview of development proposals that may be expected to see construction in the near-term. Many projects received by the City Planning Division prior to

2011 were occupied or completed construction within the last five years. Under the new definition of the pipeline, these projects are now included in the current pipeline. Between 2011 and 2015, more than 1,000 projects completed construction or received a partial occupancy permit which would indicate construction should be completed before long. These projects represent 86,605 new residential units added to the City's housing supply and 2.7 million m² of non-residential gross floor area.

While City Council has approved an average of 22,700 residential units per year between 2011 and 2015, not all proposed units are approved, and not all approved units are built. In the current pipeline, 106,135 residential units are not yet approved, and 118,610 units are active. Figure 5 (on page 8) displays these units by status, showing that 34% of the proposed residential units are under review, a further 38% are active, and a final 28% are built.

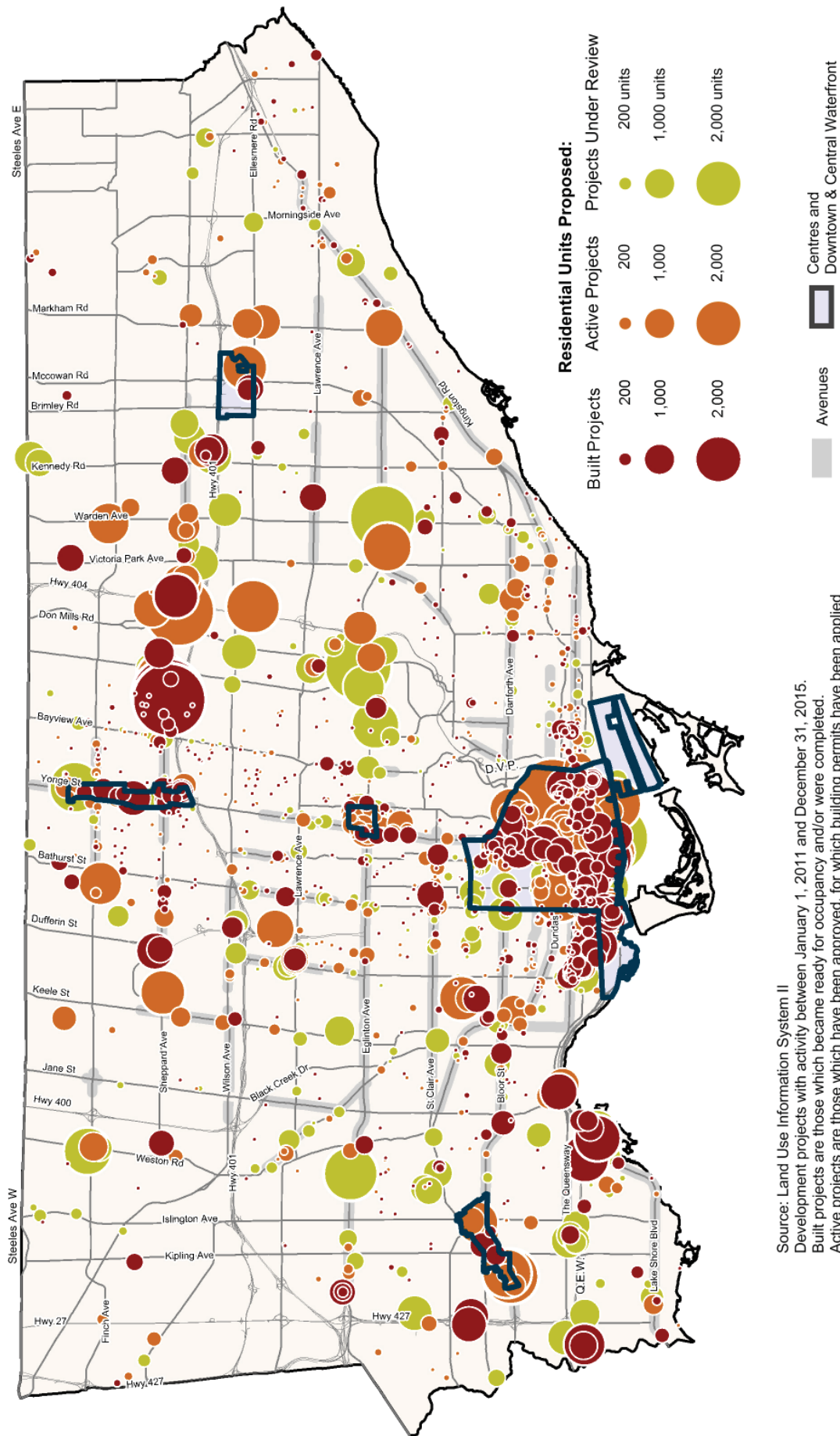
Across the City, almost three-quarters of the residential units and two-thirds of the non-residential GFA proposed in the development pipeline are not yet built. There are 224,745 units and

Table 4: Proposed Non-Residential GFA in City of Toronto by Status

	Built	Active	Under Review	Total in Pipeline	% of Total
City of Toronto	2,687,948	2,857,971	2,398,706	7,944,626	
Growth Areas					
Downtown and Central Waterfront	1,243,632	1,407,781	1,016,507	3,667,921	46.2
Centres	88,860	70,220	61,336	220,416	2.8
Etobicoke Centre	601	16,889	7,183	24,673	11.2
North York Centre	62,373	31,596	21,586	115,555	52.4
Scarborough Centre	2,221	4,141	0	6,362	2.9
Yonge-Eglinton Centre	23,666	17,593	32,567	73,826	33.5
Avenues	455,842	302,284	305,253	1,063,379	13.4
Other Mixed Use Areas	33,553	226,000	170,081	429,634	5.4
All Other Areas	866,061	851,686	845,529	2,563,276	32.3

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

Development projects with activity between January 1, 2011 and December 31, 2015. 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 those which are under construction. Projects under review have not yet been approved or refused, or are under appeal. Gross floor area values are expressed in square metres.

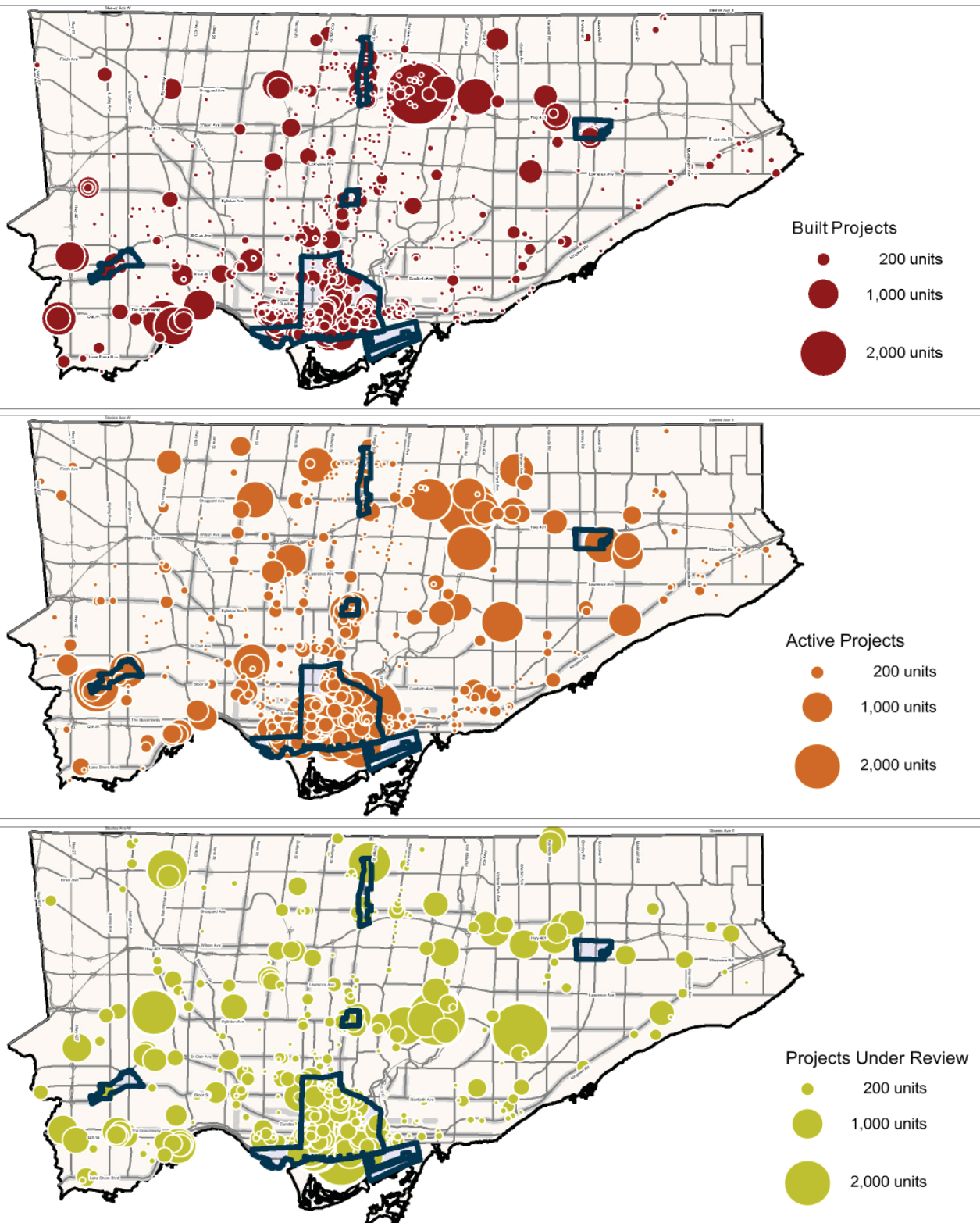


Source: Land Use Information System II
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Toronto City Planning Division, Research and Information - September 2016



Map 3: City of Toronto Proposed Residential Development by Status



Source: Land Use Information System II

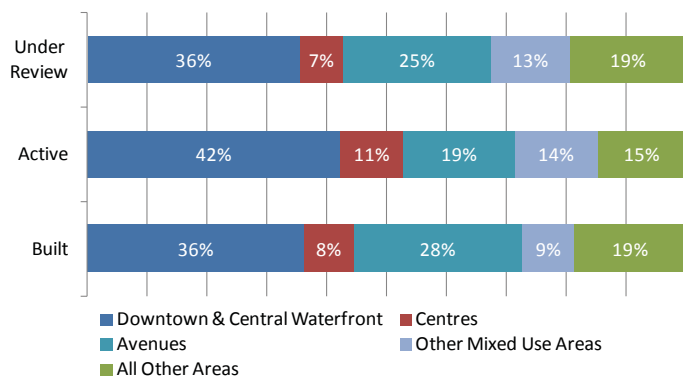
Development projects with activity between January 1, 2011 and December 31, 2015.

Built projects are those which became ready for occupancy and/or were completed.

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Figure 3: Proposed Residential Units in Growth Areas by Status

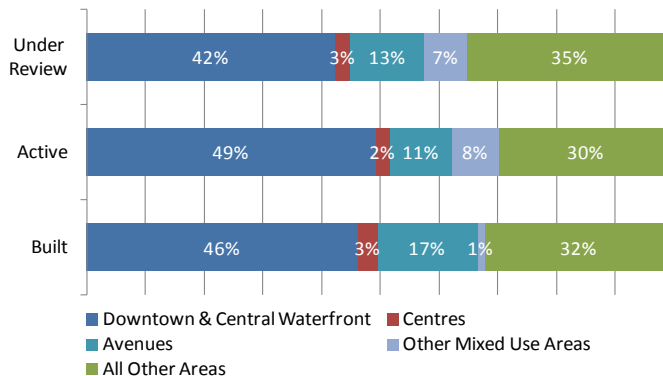


Source: City of Toronto, City Planning Division: Land Use Information System II

Development projects with activity between January 1, 2011 and December 31, 2015. 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 those which are under construction. Projects under review have not yet been approved or refused, or are under appeal. Percentages may not total 100 due to rounding.

5.26 million m² of non-residential GFA that are either awaiting approval or awaiting construction, indicating a continuation of strong construction activity in Toronto in the coming years. The residential projects that are not yet built represent 16 to 22 years of potential housing supply, given the average pace of completions reported by CMHC over the past 10 or 30 years respectively (see Table 1).

Figure 4: Proposed Non-Residential GFA in Growth Areas by Status



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

Development projects with activity between January 1, 2011 and December 31, 2015. 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 those which are under construction. Projects under review have not yet been approved or refused, or are under appeal. Percentages may not total 100 due to rounding.

Dwelling Unit Completions and Absorptions

Given the large number of residential units recently proposed and completed in the City, it is fair to ask whether this reflects growing housing demand or the early signs of an overbuilt market. 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 5 compares the number of completions and absorptions in Toronto over the last 15 years.

The percentage of unabsorbed units is higher over the two most recent 5-year periods compared to 2001–2005. From 2001–2005, the number of units completed and units absorbed in the same year roughly kept pace with each other.

In 2012, about 13,500 residential units were completed and 12,000 units were absorbed, making the unabsorbed percentage in 2012 (12.2%) the highest in the 15-year span. The lag in absorption disappeared in the following year as the 2013 unabsorbed percentage came back down to 4.9% and is closer to the average over the past

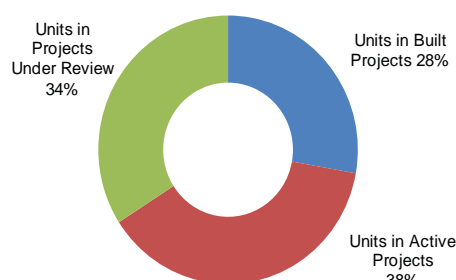
15 years. Further, in 2014, the number of units absorbed was greater than the number completed, indicating those units that completed construction in previous years were absorbed into the market in 2014.

In 2015, an unprecedented number of units were completed and 96% of them were absorbed in the same year. This demonstrates a strong demand for living in Toronto rather than suggesting an overbuilt market.

The Market Absorption Survey data by dwelling type addresses the issue of fluctuating completions and absorptions. It shows no significant net increases in unabsorbed units for freehold and condominiums units over the last five years (see Appendix on page 22). Supply and demand are well balanced. The bulk of the unabsorbed units are in the rental market. Rental completions represented 7% of total completions, but only 5% of total absorptions.

The higher rate of unabsorbed rental units is not the result of oversupply of this type of unit. The methodology of the Market Absorption Survey requires that buildings must be 100% completed and people are beginning to move in before the units become counted as “absorbed”. The recording of absorptions will

Figure 5: Residential Units by Status



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

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tend to lag completions in the latest periods of the Survey. This was the principal factor in the higher level of unabsorbed units in 2012. Therefore, the data on absorptions and completions needs to be interpreted with caution.

Downtown

The Downtown and Central Waterfront area is the most prominent location for development activity in the City and contains the largest percentage of proposed development of all the City's growth management areas. In the current development pipeline, the projects received in this area proposed 119,200 new units and 3.67 million m² of non-residential GFA. This comprises 38% of the residential units and 46% of the non-residential GFA proposed in the entire city.

Maps 4 and 5 (on pages 10 and 11) show the distribution of residential and non-residential projects throughout Downtown, respectively. Map 4 shows that the area between Bay St and Jarvis St continues to remain a strong and steady corridor of development activity. Many new projects with around 500 units each have been proposed even as others are completed along this spine. This region of the Downtown, particularly between Bloor St and Dundas St, is changing very rapidly.

Two of the largest projects in the Downtown are large affordable housing redevelopment projects on both sides of Dundas St. Public-private partnerships in Regent Park and Alexandra Park are developing new market housing to leverage improvements to existing social housing stock and to create new retail developments, community spaces and infrastructure. The results will be more mixed-income, mixed-use neighbourhoods that better integrate with the surrounding communities.

A notable amount of non-residential activity is occurring in the Downtown. In the current pipeline, there are 21 large projects, each proposing over

50,000 m² of non-residential GFA in the Downtown and Central Waterfront. Many of the largest projects with non-residential components are mixed-use projects, proposing large residential development as well. Their non-residential components are mainly office uses, although these projects also include:

- the built Sick Kids Hospital's Peter Gilgan Centre for Research and Learning at 674 Bay St;
- the built Women's College Hospital redevelopment at 76 Grenville St;
- the ongoing Union Station Revitalization at 61 Front St; and

- the new courthouse at 11 Centre Ave, currently under review. The proposed non-residential GFA of each of these projects is listed in Table 8 on page 19.

These projects are in addition to more than 300 other projects in the Downtown proposing less than 50,000 m² of non-residential floor space.

Map 5 shows a strong north-south trend of recent non-residential development between University Ave and Yonge St, with the largest built and active 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 projects under review proposed south of Dundas St. Many of these are large, phased,

Table 5: Dwelling Unit Completions and Absorptions, City of Toronto

	Completions	Absorptions	Net Completions	"Unabsorbed" Percentage
2001	6,349	6,522	-173	-2.7%
2002	13,721	13,293	428	3.2%
2003	13,119	12,478	641	5.1%
2004	10,438	10,575	-137	-1.3%
2005	15,136	15,126	10	0.1%
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%
Total	202,146	194,588	7,558	3.9%
2001-2015 average	13,476	12,973	504	3.9%
2001-2005 average	11,753	11,599	154	1.3%
2006-2010 average	11,643	11,156	488	4.4%
2011-2015 average	17,033	16,163	870	5.4%

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

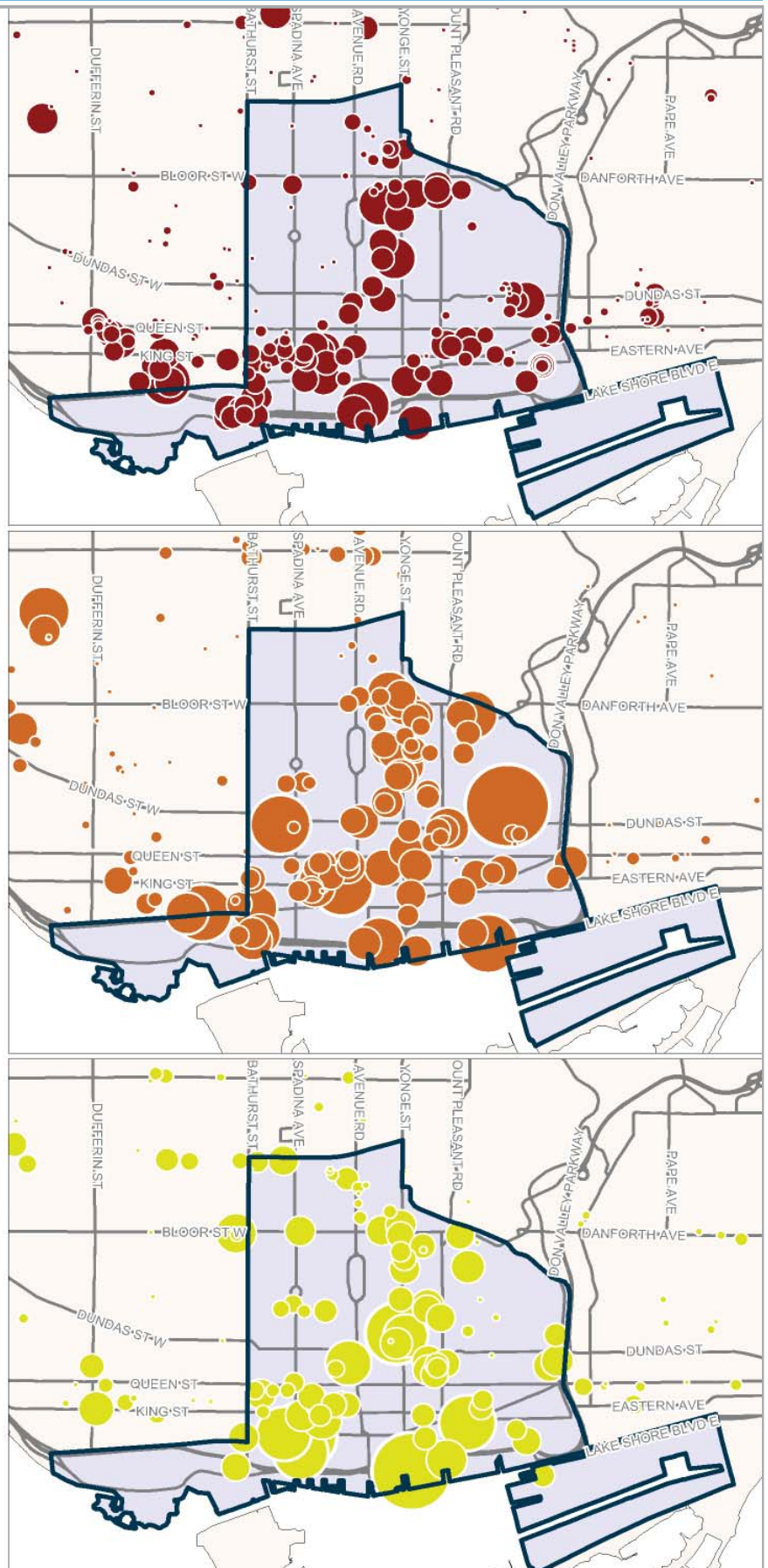
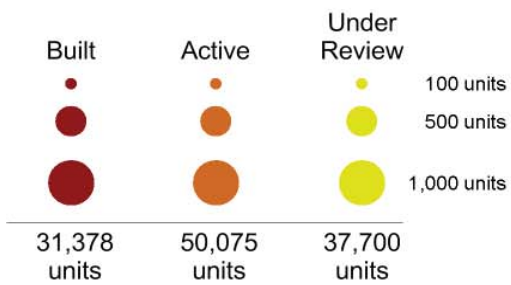
Note 1: The data in Table 5 reflects the total number of units for each 12 month period. Due to cyclical variations in the construction and sales industry that are unequally distributed throughout the year, 2016 year-to-date data has been excluded.

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

Note 3: The total number of Completions in Table 5 varies from the Appendix due to co-operatives and unknown market types. In 2011 there were 29 completed co-operatives in the City of Toronto.

Map 4: Downtown and Central Waterfront Residential Development Activity

Residential Units Proposed



Source: Land Use Information System II

Development projects with activity between January 1, 2011 and December 31, 2015.

Built projects are those which became ready for occupancy and/or were completed.

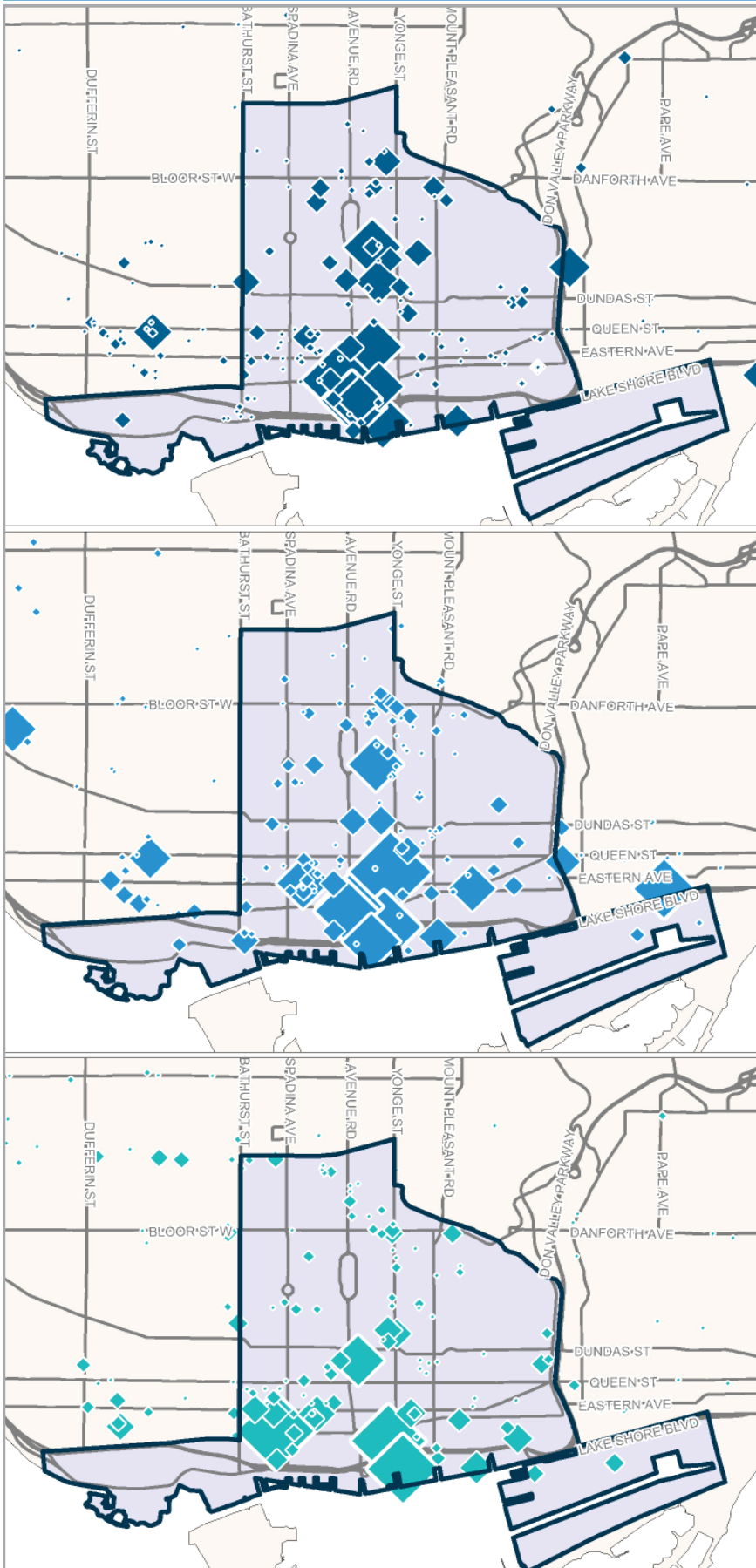
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Toronto City Planning, Research and Information - September 2016



Map 5: Downtown and Central Waterfront Non-Residential Development Activity



Non-Residential GFA Proposed

Built	Active	Under Review	
			5,000 m2
			25,000 m2
			50,000 m2
1,243,632 m2	1,407,781 m2	1,016,507 m2	

Source: Land Use Information System II

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Toronto City Planning, Research and Information - September 2016



mixed-use projects, proposed mainly on lands designated as mixed-use or regeneration areas and in Secondary Plan areas that permit both residential and non-residential development.

Centres

The four Centres are focal points of transit infrastructure where jobs, housing and services are concentrated and that are vital to the City's growth management strategy. There are 75 projects in the development pipeline that are located in the Centres and which contain 9% of the City's proposed residential units. About 20,100 units as well as 131,600 m² of non-residential GFA are proposed in the Centres and not yet built. There is likely to be substantial residential and non-residential construction in the Centres in coming years.

The residential projects in the Centres are generally high-density development with an average of 477 residential units per project. This is the highest average project size in the growth management areas. It is higher than Downtown, which has an average of 414 units per residential project.

Strong residential development activity is occurring within the boundaries of Yonge-Eglinton Centre. With nearly 10,600 units proposed, Yonge-Eglinton Centre contains 39% of the residential units in the pipeline within the Centres. Non-residential development in the Centres is strongest in North York Centre where 115,600 m² of non-residential GFA is in the pipeline, or 52% of all non-residential GFA proposed within the Centres. More than half (54%) of the proposed non-residential development in North York Centre is already built.

Avenues

The Avenues are important corridors along major streets well served by transit which are expected to redevelop incrementally over time. They are an effective alternative to Downtown and the Centres for redevelopment. The Avenues have 72,800 units and 1,063,400 m² of non-residential GFA proposed in the development pipeline. This represents 23% of the City's proposed units and 13% of its proposed non-residential GFA. Roughly equal numbers of residential units proposed in the Avenues are built, active, and under review. A slightly higher percentage of non-residential development is already built, with 455,800 m² or 43% of proposed non-residential GFA having become ready for occupancy or completed.

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, which encourage a broad range of commercial, residential and institutional uses, such as local shopping areas along minor arterial roads. These additional Mixed Use Areas have another 37,800 units and 429,600 m² of non-residential GFA proposed. This accounts for 12% of the City's proposed residential units and 5% of its proposed non-residential GFA. Most of the proposed development occurring in these areas is active, with 43% of residential units and 53% of non-residential GFA proposed falling into the active category.

All Other Areas

Table 3 shows that over 54,400 units or 18% 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 or infill projects, in areas designated as Neighbourhoods.

Almost two-fifths (38%) of the residential units proposed in All Other Areas are under review.

There is 2.56 million m² of non-residential GFA proposed in these other areas, two-thirds of which is in the Core or General Employment Areas which the Official Plan targets for non-residential growth. Roughly equal amounts of non-residential GFA proposed in these other areas are built, active and under review.

Secondary Plan Areas

Secondary Plans enable defined areas of the City to develop in accordance with policies that guide development and investment within a local context. The Secondary Plan areas 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 the Downtown, Centres and Avenues policies. Map 6 (on page 14) displays the areas of the in-force Secondary Plans and the locations of development projects within each one.

As seen in Table 6, 526 projects or 22% of all projects in the pipeline are proposed in Secondary Plan areas. These projects propose 142,200 residential units and 2.34 million m² of non-residential GFA. This represents 46% of the residential units and 30% of the non-residential GFA proposed in the entire City. A higher percentage of the proposed residential units in the Secondary Plan Areas are active (40%) versus those that are built (36%) or under review (26%). The non-residential development is roughly evenly split between built, active, and under review non-residential GFA.

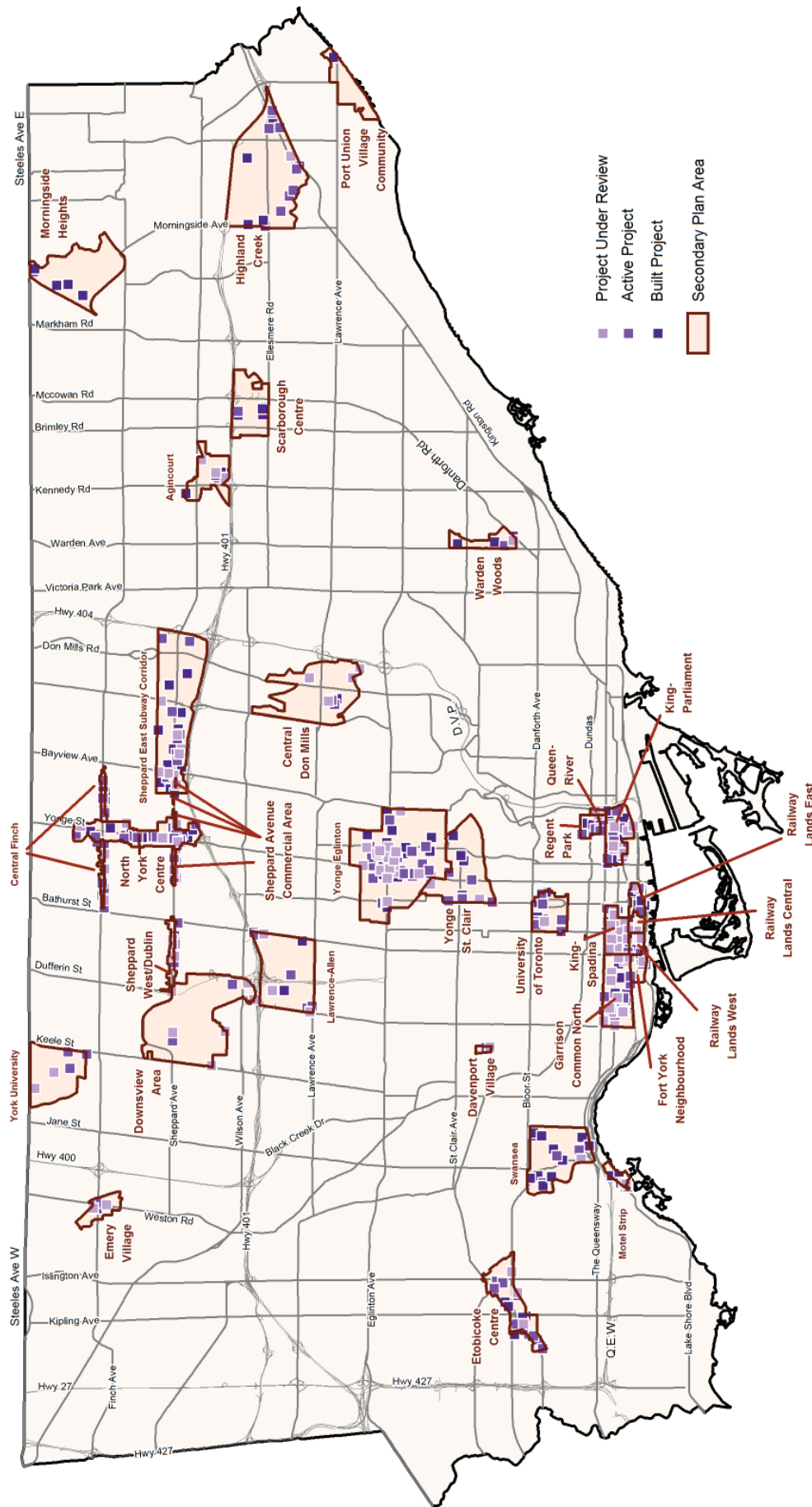
The King-Spadina Secondary Plan area is seeing significant development activity in the current pipeline. Almost one-fifth of both the residential units (18%) and of the non-residential GFA (21%) proposed in all the Secondary Plan areas are located within the King-Spadina area. This is a total of 25,600

Table 6: Proposed Development in Secondary Plan Areas

	Proposed Residential			Proposed Non-Residential		
	Number of Projects	%	Units	%	GFA (m²)	%
City of Toronto	2,362		311,350		7,944,626	
Secondary Plans	526	22.3	142,170	45.7	2,340,562	29.5
Agincourt	8	1.5	5,073	3.6	26,032	1.1
Central Don Mills	8	1.5	1,793	1.3	8,854	0.4
Central Finch Area	27	5.1	391	0.3	5,892	0.3
Davenport Village	2	0.4	1,392	1.0	2,899	0.1
Downsview Area	10	1.9	1,749	1.2	59,880	2.6
Emery Village	5	1.0	2,720	1.9	2,000	0.1
Etobicoke Centre	19	3.6	7,534	5.3	24,673	1.1
Fort York Neighbourhood	10	1.9	4,225	3.0	27,954	1.2
Garrison Common North	46	8.7	13,129	9.2	233,075	10.0
Highland Creek	17	3.2	188	0.1	76,739	3.3
King-Parliament	37	7.0	10,347	7.3	157,861	6.7
King-Spadina	69	13.1	25,553	18.0	493,807	21.1
Lawrence-Allen	15	2.9	3,146	2.2	43,380	1.9
Morningside Heights	5	1.0	139	0.1	9,047	0.4
Motel Strip	8	1.5	4,710	3.3	18,753	0.8
North York Centre	30	5.7	8,904	6.3	116,622	5.0
Port Union Village Community	1	0.2	101	0.1	0	0.0
Queen-River	3	0.6	1,225	0.9	16,588	0.7
Railway Lands Central	2	0.4	1,536	1.1	16,109	0.7
Railway Lands East	9	1.7	2,049	1.4	589,845	25.2
Railway Lands West	5	1.0	2,359	1.7	20,290	0.9
Regent Park	15	2.9	6,691	4.7	34,486	1.5
Scarborough Centre	5	1.0	947	0.7	6,362	0.3
Sheppard Avenue Commercial Area	13	2.5	22	0.0	10,764	0.5
Sheppard East Subway Corridor	35	6.7	16,534	11.6	49,594	2.1
Sheppard West/Dublin	13	2.5	1,369	1.0	9,432	0.4
Swansea	15	2.9	2,052	1.4	5,443	0.2
University of Toronto	12	2.3	1,274	0.9	72,106	3.1
Warden Woods	5	1.0	425	0.3	6,584	0.3
Yonge Eglinton	57	10.8	14,593	10.3	127,402	5.4
Yonge St. Clair	12	2.3	1,343	0.9	846	0.0
York University	11	2.1	487	0.3	67,243	2.9
Status	526	100.0	142,170	100.0	2,340,562	100.0
Built	234	44.5	50,905	35.8	755,565	32.3
Active (approved but not yet built)	169	32.1	56,144	39.5	765,198	32.7
Under Review (not approved)	123	23.4	36,951	26.0	819,799	35.0

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

Development projects with activity between January 1, 2011 and December 31, 2015. 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 those which are under construction. Projects under review have not yet been approved or refused, or are under appeal. Note 1: 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 2, 3, and 4 of this document. Note 2: The sum of each column may not add up to the totals of all the Secondary Plans because of the overlapping boundaries of the Sheppard Avenue Commercial Area Secondary Plan and the Sheppard East Subway Corridor Secondary Plan. The same project may appear in more than one Secondary Plan.



Source: Land Use Information System II

Development projects with activity between January 1, 2011 and December 31, 2015. Built projects are those which became ready for occupancy and/or were completed. Active projects are those which have been applied for, for which building permits have been issued, and those which are under construction. Projects under review have not yet been approved or refused, or are under appeal.

Toronto City Planning Division, Research and Information - September 2016



residential units and 493,800 m² of non-residential GFA proposed in the area. The King-Spadina Secondary Plan area, which is located within the Downtown, runs from Bathurst St in the west to John St and Simcoe St in the east, and between Queen St W in the north and Front St W in the south. It is one of the smaller Secondary Plan areas at 84.5 hectares. The major objectives of this Plan are to attract new investment with a mixture of compatible land uses to the area, while recognizing the importance of maintaining employment uses and protecting its heritage buildings.⁸

The Railway Lands East Secondary Plan has also undergone significant non-residential development. Another Secondary Plan area in the Downtown, the Railway Lands East falls roughly between John St and Yonge St, Front St W and the Gardiner Expressway. Major objectives of this Secondary Plan include mandating that new development be mixed-use, satisfying a broad range of commercial, residential institutional, cultural, recreational, and open space needs.⁹

Employment Areas

Toronto's Employment Areas play an important role in contributing to the City's diverse economic base and to the City's wealth. In 2011, the City commenced its Municipal Comprehensive Review (MCR) of employment lands as required by the Planning Act. The MCR concluded in 2013, with Council's adoption of Official Plan Amendment 231 (OPA 231),¹⁰ which received Ministerial approval (with minor modifications) in July 2014.

OPA 231 includes new policies for the City's Economic Health and lands designated as Employment Areas, representing the policy direction of the City and the Province. OPA 231 was appealed to the Ontario Municipal Board and is currently before the Board for consideration.

The in-force Official Plan states, "Employment Areas are places of business and economic activity. Uses that support this function consist of:

offices, manufacturing, warehousing, distribution, research and development facilities, utilities, media facilities, parks, hotels, retail outlets that are ancillary to the preceding uses and restaurants and small scale stores and services that serve area businesses and workers."¹¹

The development pipeline covered in this bulletin includes the years 2011 to 2015. During this time, Employment Districts were part of Toronto's Urban Structure as described in Chapter 2 of the Official Plan. OPA 231 deletes the term Employment Districts and replaces it with the term Employment Areas. As such, this bulletin outlines development activity in the designated Employment Areas only.

There is a long-standing trend towards central cities in North American metropolitan areas losing manufacturing activities to suburban locations over an extended period of time.¹² Toronto is no different than these other cities. Employment in the manufacturing sector in Toronto has been decreasing almost every year since 1983, from 22% to 9% of total employment in 2015.¹³ Despite this City-wide decline, in 2015, the manufacturing sector accounted for nearly 30% of all the jobs in the Employment Areas and 92% of manufacturing jobs in the City were located in Employment Areas.¹⁴ At the same time, Toronto's employment activity has grown and diversified.

Employment Areas are also attractive locations for the creation of new businesses, with 32% of new establishments in the City in 2015 locating in Employment Areas.¹⁵ With 1.72 million jobs forecasted for the City of Toronto by 2041,¹⁶ the protection and enhancement of the Employment Areas is vital to the City's economic health.

The Employment Areas continue to see significant reinvestment. Over the five years from 2011 to 2015, \$2.16B in Building Permits were applied for in Employment Areas and \$1.54B have already been approved. Moreover, the development projects proposed in the Employment Areas, as seen in Table 7, will help the City reach its forecasted growth potential. New development

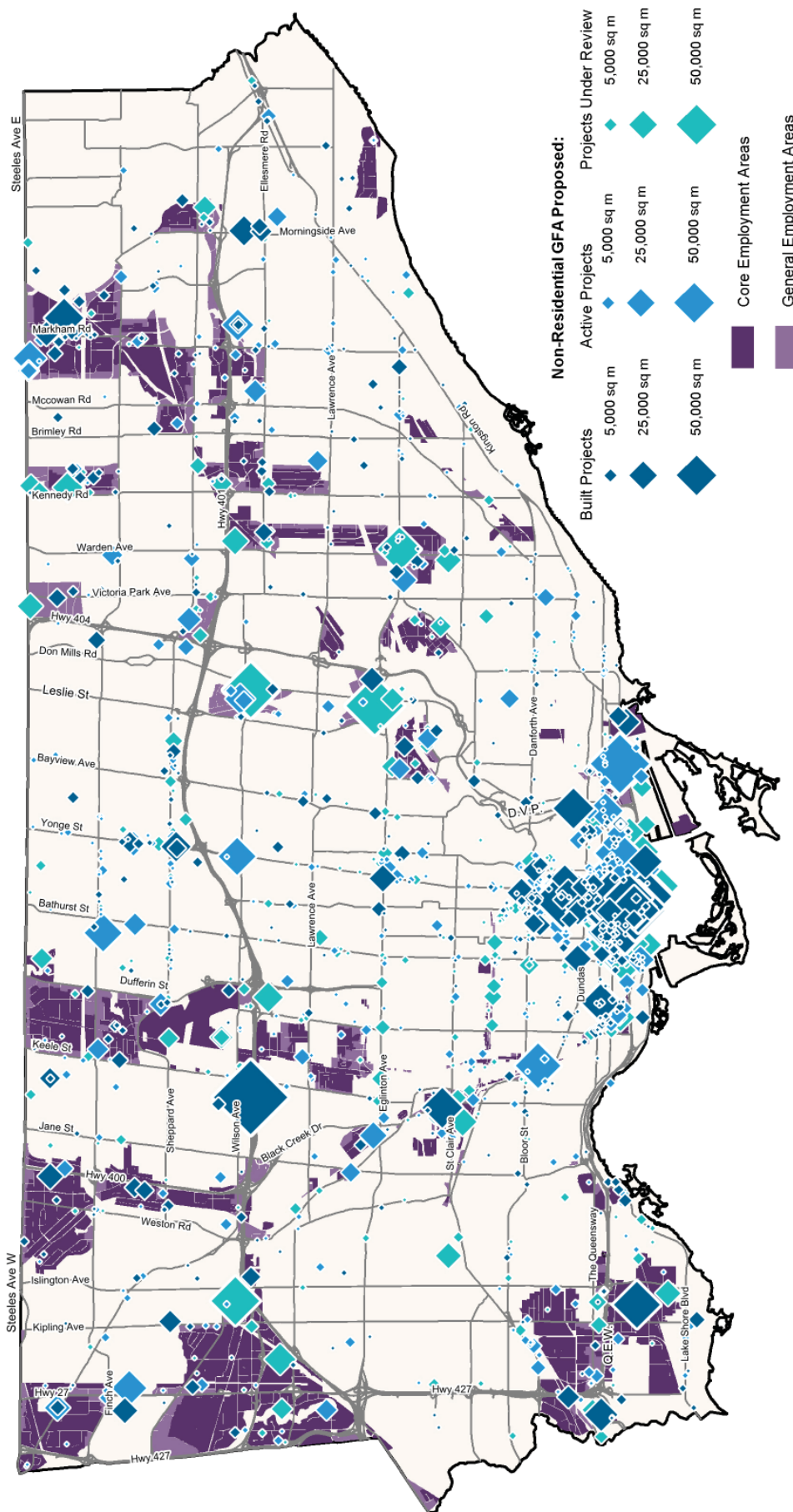
could bring new life and new jobs to many of these areas. The Employment Areas have 1.82 million m² or 23% of the City's proposed non-residential GFA (see Maps 7 and 8 on pages 16 and 17 and Table 7 on page 18). Thirty-seven percent of these projects have been built, which amounts to 549,900 m² of new, non-residential floor space in 100 different projects.

Over the next few years, as development progresses on projects that have been approved, another 562,100 m² of non-residential GFA in 91 projects will be constructed in the Employment Areas. A further 79 projects with 712,800 m² of non-residential GFA is awaiting development approval and may eventually be constructed in Employment Areas.

OPA 231, Section 4.6 categorizes Employment Areas into two different land use designations: Core Employment Areas and General Employment Areas. Core Employment Areas are locations where primary employment uses are permitted. They are, for the most part, geographically located within the interior of Employment Areas. Uses that would attract the general public into the interior of employment related lands and possibly disrupt industrial operations are not generally permitted in the Core Employment Areas. This separation prioritizes goods movement within Core Employment Areas and provides operating industries the certainty of uses surrounding their businesses.

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.

The proposed non-residential GFA in the Employment Areas is split fairly evenly between Core (949,900 m²) and General Employment Areas (874,900 m²). In the Core Employment Areas, the non-residential GFA proposed is roughly equal across the three statuses of built, active, and under review,

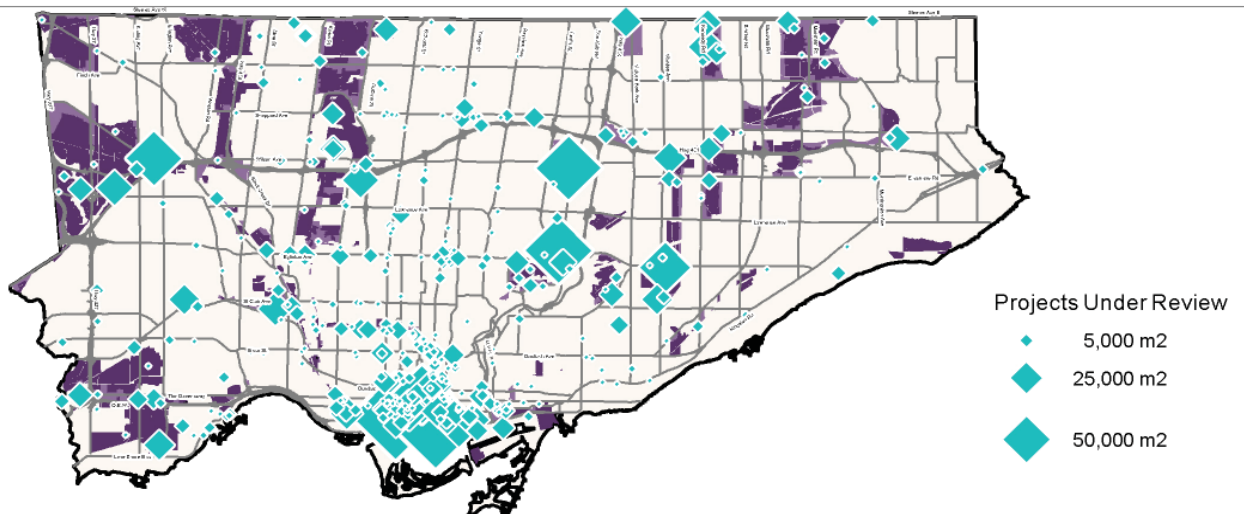
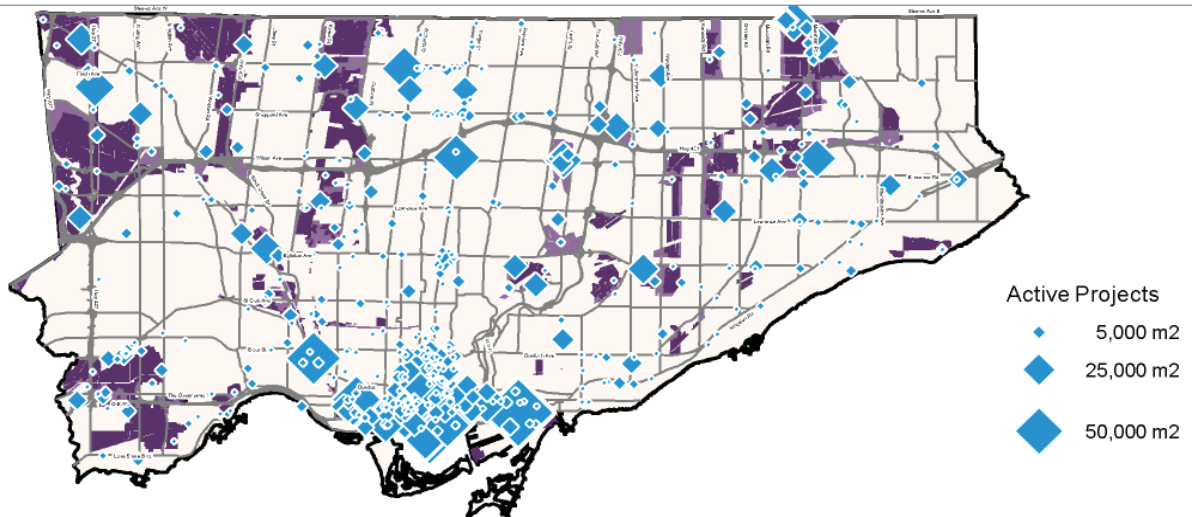
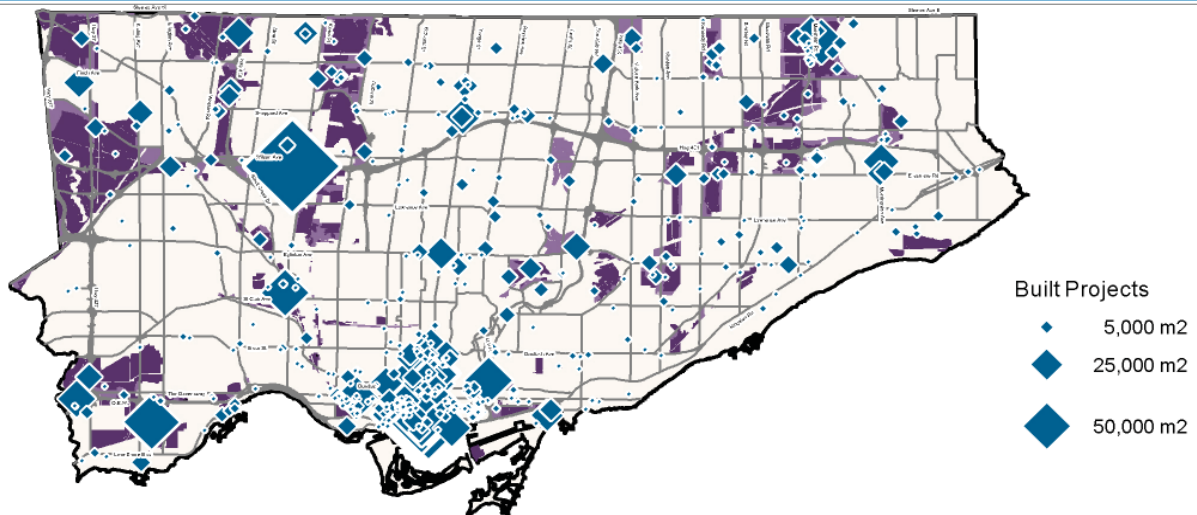


Source: Land Use Information System II
Development projects with activity between January 1, 2011 and December 31, 2015.
Built projects are those which became ready for occupancy and/or were completed.
Active projects are those which building permits have been applied or have been issued, and those which are under construction.
Projects under review have not yet been approved or refused, or are under appeal.

Toronto City Planning Division, Research and Information - September 2016



Map 8: City of Toronto Proposed Non-Residential Development by Status



Source: Land Use Information System II

Development projects with activity between January 1, 2011 and December 31, 2015.

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 issued, and those which are under construction.

Projects under review have not yet been approved or refused, or are under appeal.

Core Employment Areas

General Employment Areas

indicating stable growth in these areas. In the General Employment Areas, projects are increasing in size. There are more built projects in these areas than active projects, and more active projects than under review projects. However, the projects under review are proposing almost twice as much non-residential GFA as what is proposed in the built and active projects. This points to an increasing interest in proposing large non-residential projects in General Employment Areas.

Toronto Non-Residential Market

The City's non-residential market remains strong, mainly consisting of office space but also including other uses such as retail, institutional and hotels. Almost 907,900 m² was constructed in projects larger than 50,000 m², all of which were built between 2011 and 2014 (see Table 8). In 2015, only one new predominantly non-residential building was built Downtown: the Queen-Richmond Centre West with 22,812 m² of new non-residential GFA.¹⁷

Although there was little new non-residential GFA completed in Toronto in 2015, net non-residential absorption in existing buildings increased to 48,512 m² compared to 46,256 m² in 2014 in Central Toronto. Vacancy rates across the GTA decreased to 9.6%, below the Canada-wide rate of 12.2%.¹⁸ Vacancy rates in the Downtown decreased to 4.7%, despite RBC vacating a large office building at 315 Front St W.¹⁹ These measures indicate a strong demand for non-residential space in the Toronto market.

This trend towards significant office development is continuing. After years of a sluggish office market, Toronto is exhibiting strong, sustained growth that demonstrates a renewed vitality in commercial real estate development and dynamic business activity.

A number of large non-residential projects are active or under review. Table 8 also breaks down the largest

Table 7: Proposed Development in Employment Areas by Status

	Projects		Proposed Non-Residential Gross Floor Area		
	Number	Percent	Number	Percent	
City of Toronto	2,362		7,944,626	100.0	
Total Employment Areas	270		1,824,815	23.0	100.0
Built	100	37.0	549,851		30.1
Active	91	33.7	562,124		30.8
Under Review	79	29.3	712,840		39.1
Within Employment Areas	270	100.0	1,824,815	100.0	
Core Employment Areas	133	49.3	949,936	52.1	100.0
Built	45	33.8	314,337		33.1
Active	46	34.6	339,083		35.7
Under Review	42	31.6	296,517		31.2
General Employment Areas	137	50.7	874,879	47.9	100.0
Built	55	40.1	235,514		26.9
Active	45	32.8	223,041		25.5
Under Review	37	27.0	416,324		47.6

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

Development projects with activity between January 1, 2011 and December 31, 2015. 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 those which are under construction. Projects under review have not yet been approved or refused, or are under appeal. Gross floor area values are expressed in square metres.

Note 1. The Employment Areas table can not be directly compared with Tables 2, 3, and 4 because the Avenues as broadly shown on the Official Plan Urban Structure Map run alongside and overlap portions of some Employment Areas. See Map 1 on page 2.

Note 2. Designated Employment Areas exist in Centres and along Avenues as well as in other areas of the City.

proposed non-residential space by status and location. Four of the five largest active projects are in the Downtown. These five projects include:

- 40 Adelaide St W, the three-phased Bay-Adelaide Centre, including two built office towers and a 32-storey office tower that is under review;
- 45 Bay St, which includes a major office tower, an elevated park over a rail corridor and the GO bus terminal integrated into the project;
- 156 Front St W, a 46-storey office tower;
- 171 Front St W, a 48-storey office tower; and
- 629 Eastern Ave, a project that maintains the existing film and production studios while adding 75,600 m² of office flex space, as well as hotel space.

In addition, six large non-residential projects are under review. The three largest projects under review include:

- 440 Front St W, the former site of the Globe and Mail, which proposes seven mixed use buildings and 105,364 m² of office space and 44,824 m² of retail space;
- 141 Bay St, the second phase of the development at 45 Bay St, proposing a 54-storey office tower; and
- 1 Yonge St, which retains the existing Toronto Star office building and adds several mixed-use towers.

The Downtown accounts for 69% of the office space currently under construction in the GTA. The 905 markets now account for the bulk of the remainder, including major concentrations in Oakville, Vaughan, Markham/Richmond Hill and

Table 8: Development Projects Proposing $\geq 50,000$ m² Non-Residential GFA

Project Location		Proposed Non-Residential GFA (m ²)	Percent
City of Toronto		7,944,626	100.0
Proposed Non-Residential GFA $\geq 50,000$ m²		3,007,123	37.9 100.0
Built Projects		907,885	30.2
1201 Wilson Ave	Avenue	197,884	6.6
155 Wellington St W*	Downtown	144,631	4.8
120 Bremner Blvd	Downtown	98,995	3.3
76 Grenville St	Downtown	88,632	2.9
88 Queens Quay W**	Downtown	81,772	2.7
61 Front St W***	Downtown	65,861	2.2
130 Horner Ave	Employment Areas	65,557	2.2
18 York St	Downtown	57,792	1.9
674 Bay St	Downtown	55,615	1.8
30 Weston Rd	Avenue	51,147	1.7
Active Projects		1,305,662	43.4
40 Adelaide St W****	Downtown	284,880	9.5
45 Bay St	Downtown	136,950	4.6
156 Front St W	Downtown	111,679	3.7
171 Front St W	Downtown	100,200	3.3
629 Eastern Ave	Employment Areas	96,715	3.2
100 Adelaide St W	Downtown	86,960	2.9
90 Harbour St	Downtown	86,610	2.9
880 Bay St	Downtown	80,622	2.7
16 York St	Downtown	75,390	2.5
388 King St W	Downtown	74,736	2.5
333 King St E	Downtown	60,028	2.0
158 Sterling Rd	Employment Areas	59,857	2.0
1001 Queen St W	Avenue	51,035	1.7
Projects Under Review		614,847	20.4
440 Front St W	Downtown	150,188	5.0
141 Bay St	Downtown	136,072	4.5
1 Yonge St	Downtown	129,735	4.3
11 Centre Ave	Downtown	73,530	2.4
2200 Islington Ave	Employment Areas	67,322	2.2
1966 Eglinton Ave E	Avenue	58,000	1.9
Projects Under Appeal		178,729	5.9
Proposed Non-Residential GFA between 10,000 m² and 49,999 m²		2,734,797	34.4
Proposed Non-Residential GFA less than 10,000 m²		2,202,705	27.7

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

Development projects with activity between January 1, 2011 and December 31, 2015. 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 those which are under construction. Projects under review have not yet been approved or refused, or are under appeal. Gross floor area values are expressed in square metres.

*Project includes 181 and 183 Wellington St W, and was originally submitted as 230 Front St W. **Third phase of a larger project at 10-20 Bay St. ***Union Station Revitalization project has become partially ready for occupancy although substantial work is still outstanding. ****40 Adelaide St W is a three-phased project; gross floor area includes all three phases.

Meadowvale.²⁰ More than half (58%) of the office space under construction in the GTA is pre-leased, including 70% of the office space under construction in the Downtown.²¹ The high degree of pre-leasing of office buildings is a positive sign for the City's non-residential market.

Density and Mix of Jobs and People in Growth Areas

The Provincial Growth Plan sets minimum gross density targets to be achieved by 2031 for Urban Growth Centres (UGC's). The minimum gross density target is 400 residents and jobs combined per hectare for each Centre and for the Downtown. If an Urban Growth Centre has already achieved a density higher than 400 people and jobs per hectare, then that density is considered to be that UGC's target.²²

Using current pipeline data, it is possible to estimate the density in 2015 in the City overall, in the Downtown and Central Waterfront, and in the Centres. Table 9 on page 20 shows the density of people and jobs per hectare for the Downtown and each Centre between 2006 and 2015. Since 2006, each of these areas has become steadily more dense. North York Centre and Yonge-Eglinton Centre have already exceeded 400 people and jobs per hectare, as early as 2006 in the case of Yonge-Eglinton Centre. These Centres have continued to become more dense. Growth has been slower in Etobicoke Centre and Scarborough Centre, but has been increasing steadily. If the density trends in each area continue, it is likely that the Downtown will exceed the density target well before 2031.

In addition to density measures, the ratio of jobs to people can provide further insight into how Toronto is growing. This measure provides a sense of how mixed the City and its growth areas are, and how they are changing over time. Table 10 reveals that the ratio of jobs to people has been relatively unchanged for the City overall for the past ten years.

However, the ratio of jobs to people has been declining steadily in the Downtown and in each Centre since 2006. This is primarily due to the strong residential growth that has occurred over the last decade.

The rate at which the population growth exceeds employment growth varies across the different growth areas. In North York Centre the jobs-to-people ratio increased between 2006 and 2011 and since then has declined to lower than 2006 levels. In Etobicoke Centre and Yonge-Eglinton Centre, the ratio declined between 2006 and 2011, but has remained relatively steady in more recent years. Scarborough Centre is the only Centre containing more jobs than people in 2015.

Table 11 shows that the declining ratios have occurred primarily because employment growth has not kept pace with population growth in each of the Urban Growth Centres. Since 2006, Downtown employment has grown significantly, by 29%, yet population is estimated to have grown by 51% to 64%. Similarly, the Centres collectively grew in population by 40-45%, while the Centres' employment grew by 11% over the same period. The different growth rates are

Table 9: Density of People and Jobs Per Hectare in Urban Growth Centres

Year	2006	2011	2015
Scenario	Actual	Actual	Estimated Population Change - Low Estimated Population Change - High
City of Toronto	60	62	67 67
Urban Growth Centres			
Downtown and Central Waterfront	265	302	359 369
Centres	250	288	314 321
Etobicoke Centre	137	144	161 164
North York Centre	385	455	501 512
Scarborough Centre	138	156	177 179
Yonge-Eglinton Centre	482	570	589 595

Sources: City of Toronto, City Planning Division: Land Use Information System II. City of Toronto, City Planning, Toronto Employment Surveys 2006, 2011, 2015. Statistics Canada, 2006 and 2011 Censuses. Custom tabulation.

2006 and 2011 numbers were calculated based on actual employment values from the Toronto Employment Survey and actual population values from the Census. 2015 numbers were calculated based on actual employment values from the Toronto Employment Survey and two scenarios of low and high estimated population growth using different persons per unit ratios.

especially pronounced in Etobicoke Centre, where population increased by 42-46% at the same time as employment declined by 8%.

These figures indicate that population is increasing faster than employment in Toronto's Urban Growth Centres, even as their densities increase towards the Growth Plan's targets. Moreover, 74% of proposed residential

units in Downtown and the Centres in the current pipeline have not yet been built, versus 66% of proposed non-residential GFA. These figures suggest that while employment continues to grow overall, the trend of decreasing jobs to people ratios may continue into the future in these growth areas as more residential development is forthcoming than what was built in the past five years.

Table 10: Ratio of Jobs to People in Urban Growth Centres

Year	2006	2011	2015
Scenario	Actual	Actual	Estimated Population Change - Low Estimated Population Change - High
City of Toronto	0.51	0.50	0.50 0.50
Urban Growth Centres			
Downtown and Central Waterfront	2.30	2.15	1.96 1.80
Centres	0.96	0.86	0.77 0.74
Etobicoke Centre	0.90	0.59	0.58 0.56
North York Centre	0.79	0.82	0.65 0.62
Scarborough Centre	1.40	1.23	1.18 1.15
Yonge-Eglinton Centre	1.16	0.94	0.94 0.92

Sources: City of Toronto, City Planning Division: Land Use Information System II. City of Toronto, City Planning, Toronto Employment Surveys 2006, 2011, 2015. Statistics Canada, 2006 and 2011 Censuses. Custom tabulation.

2006 and 2011 ratios were calculated based on actual employment values from the Toronto Employment Survey and actual population values from the Census. 2015 ratios were calculated based on actual employment values from the Toronto Employment Survey and two scenarios of low and high estimated population growth using different persons per unit ratios.

Toronto's Official Plan seeks to direct growth to the Centres and the 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."²³ Toronto's overall growth is encouraging. The divergent rates of change in population and employment growth in the Downtown and the Centres indicate the importance of continuing to promote employment and mixed-use development in these areas.

Table 11: Rate of Change of Population and Employment in Urban Growth Centres, 2006-2015

Scenario	Estimated Population Change - Low	Estimated Population Change - High	Actual Employment Change
City of Toronto	13%	13%	11%
Urban Growth Centres			
Downtown and Central Waterfront	51%	64%	29%
Centres	40%	45%	11%
Etobicoke Centre	42%	46%	-8%
North York Centre	42%	47%	15%
Scarborough Centre	42%	45%	19%
Yonge-Eglinton Centre	36%	39%	10%

Sources: City of Toronto, City Planning Division: Land Use Information System II. City of Toronto, City Planning, Toronto Employment Surveys 2006, 2011, 2015. Statistics Canada, 2006 and 2011 Censuses. Custom tabulation.

Population changes were calculated based on actual population values from the 2006 Census and two 2015 population scenarios based on low and high estimated population growth using different persons per unit ratios. Employment change was calculated based on actual employment values from the Toronto Employment Survey.

How the Data is Collected

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

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

Freeholds

	Completions	Absorptions	Net Completions	"Unabsorbed" Percentage
2011	1,381	1,425	-44	-3.1
2012	1,502	1,529	-27	-1.8
2013	1,735	1,649	86	5.2
2014	1,583	1,525	58	3.8
2015	1,374	1,342	32	2.4
Total	7,575	7,470	105	1.4

Condominiums

	Completions	Absorptions	Net Completions	"Unabsorbed" Percentage
2011	14,568	13,838	730	5.3
2012	9,961	9,831	130	1.3
2013	11,126	10,950	176	1.6
2014	7,777	7,900	-123	-1.6
2015	28,013	27,082	931	3.4
Total	71,445	69,601	1,844	2.6

Rental

	Completions	Absorptions	Net Completions	"Unabsorbed" Percentage
2011	901	605	296	48.9
2012	2,011	649	1,362	209.9
2013	1,681	1,269	412	32.5
2014	191	195	-4	-2.1
2015	1,362	1,027	335	32.6
Total	6,146	3,745	2,401	64.1

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 2016 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.
- ² The Official Plan states “Employment Areas are the hothouses where we grow our enterprises and jobs.” The policies for Employment Areas were recently replaced by new policies as part of the Municipal Comprehensive Review of employment lands. These new policies are currently under appeal at the Ontario Municipal Board (OMB). For more information on the status of the appeals and to access interim Board Orders, please visit the OMB’s website: <https://www.omb.gov.on.ca/ecs/CaseDetail.aspx?n=PL140860>.
- ³ The Official Plan was adopted prior to the Growth Plan coming into effect. The Official Plan is required to conform to the Growth Plan. The City has brought forward a number of Official Plan amendments to bring the Official Plan into conformity with the Growth Plan. The amended Growth Plan, including revised forecasts, came into effect in June 2013. Official Plan Amendment (OPA) 231 amended this forecast and this policy is in effect.
- ⁴ The estimated net undercoverage rate of the 2011 Census for the Toronto CMA is 3.72% ± 0.53% per Table 1.2.2, 2011 Census Technical Report: Coverage, Statistics Canada, Cat.No. 98-303-X2011001.
- ⁵ The estimated population net undercoverage rate of 3.31% for the Toronto Census Division is per Statistics Canada, Annual Demographic Estimates, 91-214-XWE.
- ⁶ Hemson Consulting Ltd, *Greater Golden Horseshoe Growth Forecasts to 2041*, Technical Report, November 2012.
- ⁷ Canada Mortgage and Housing Corporation, *Housing Now – Greater Toronto Area Reports*.
- ⁸ City of Toronto, City Planning, Official Plan, King-Spadina Secondary Plan, Policy 2, 2006.
- ⁹ City of Toronto, City Planning, Official Plan, Railway Lands East Secondary Plan, Policy 2, 2006.
- ¹⁰ 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.
- For more information about OPA 231, please visit, <http://www.toronto.ca/opreview>.
- ¹¹ City of Toronto, City Planning, Official Plan, p. 4-12, Policy 1, 2006. The Employment Areas policies have been replaced by OPA 231, and these are currently under appeal at the Ontario Municipal Board.
- ¹² Kneebone, Elizabeth (2013) *Job Sprawl Stalls: The Great Recession and Metropolitan Employment Location*, Brookings Institution.
- ¹³ City of Toronto, City Planning, *Toronto Employment Survey*, 2015.
- ¹⁴ City of Toronto, City Planning, *Profile Toronto: Toronto Employment Survey*, 2015.
- ¹⁵ City of Toronto, City Planning, *Profile Toronto: Toronto Employment Survey*, 2015.
- ¹⁶ The Official Plan was adopted before the Growth Plan came into force. By provincial legislation, the Official Plan must be brought into conformity with the policies of the Growth Plan. The City is working to bring the Official Plan into conformity with the Growth Plan through a series of Official Plan Amendments. Toronto’s Official Plan contemplates the city having 3 million people and 1.85 million jobs by 2031. The 2006 Growth Plan forecasts 3.08 million people and 1.64 million jobs in the City of Toronto by 2031. The amended Growth Plan, including revised forecasts, came into effect in June 2013.
- ¹⁷ CBRE Marketview, Toronto Office, Q4 2015.
- ¹⁸ CBRE Marketview, Canada Office Q4 2015.
- ¹⁹ CBRE Marketview, Toronto Office, Q4 2015.
- ²⁰ CBRE Marketview, Toronto Office, Q4 2015.
- ²¹ CBRE Marketview, Toronto Office, Q4 2015.
- ²² Ontario Ministry of Infrastructure, *Growth Plan for the Greater Golden Horseshoe, 2006: Office Consolidation, June 2013*, Policy 2.2.4.5 and 2.2.4.6.
- ²³ City of Toronto, City Planning, Official Plan, p. 2-5, Policy 2d, 2006.

Please direct information inquiries and publication orders to:

City Planning Division
Strategic Initiatives, Policy & Analysis
Research and Information
Metro Hall, 22nd Floor
Toronto, Ontario M5V 3C6

tel: 416-392-8343
fax: 416-392-3821
TTY: 416-392-8764
e-mail: cityplanning@toronto.ca
