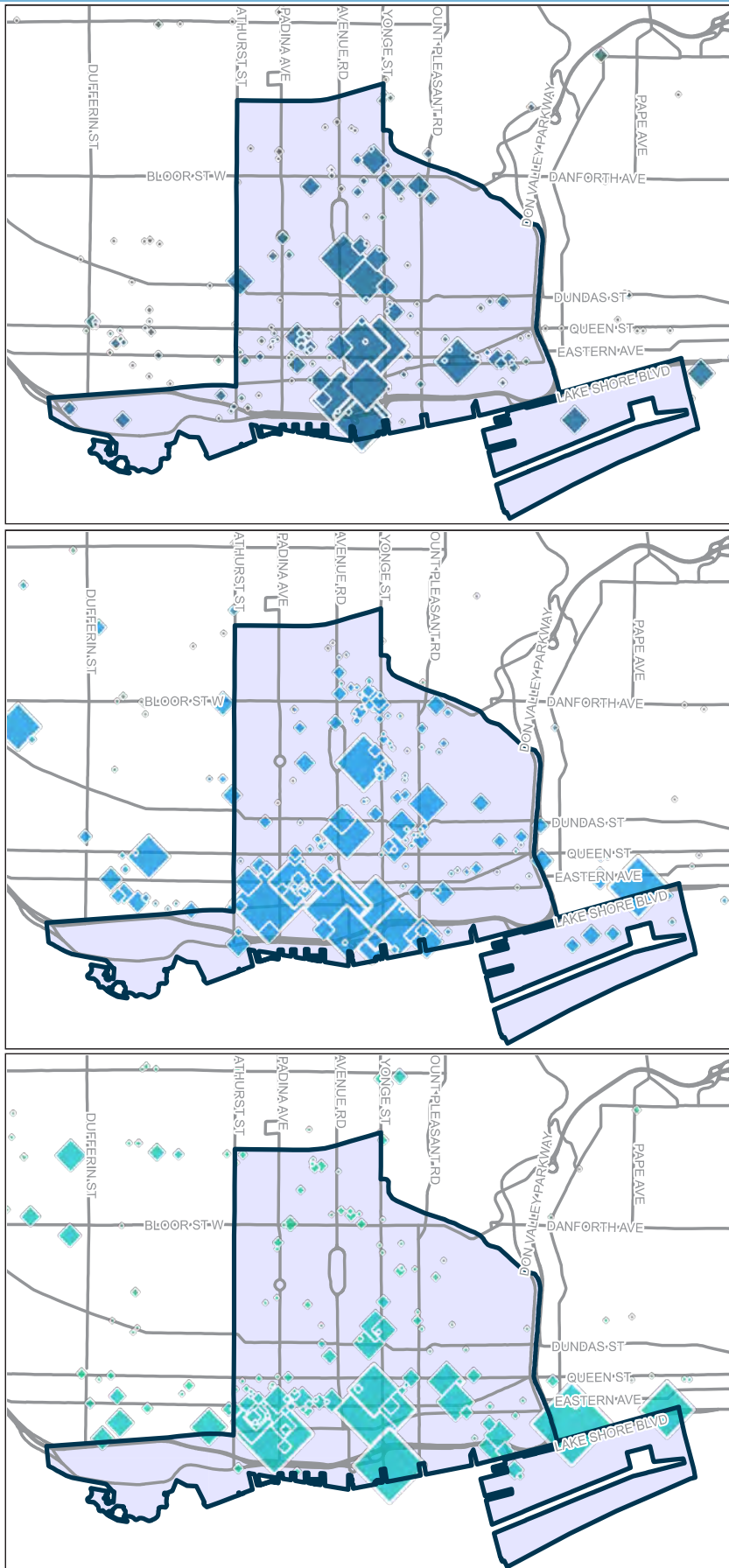


Map 5: Downtown and Central Waterfront Non-Residential Development Activity



Non-Residential GFA Proposed

Built	Active	Under Review
		◆ 5,000 sq m
		◆ 25,000 sq m
		◆ 50,000 sq m
1,138,537 sq m	1,720,351 sq m	1,223,019 sq m

Source: Land Use Information System II

Development projects with activity between January 1, 2013 and December 31, 2017.

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.

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Table 8: Downtown Development Projects Proposing ≥1,000 Residential Units

	Proposed Residential Units			Proposed Residential GFA (m ²)			Proposed Storeys (Tallest Building)	Proposed Buildings
	#	%	%	#	%	%	#	#
Downtown and Central Waterfront	140,116	100.0		10,525,366	100.0			
Proposed Residential Units ≥ 1,000	42,905	30.6		3,265,090	31.0			
<i>Built Projects</i>	3,772	8.8	%	249,034		7.6		
90 HARBOUR ST	1,426		3.3	85,924		2.6	70	3
12 & 14 YORK ST*	1,343		3.1	87,650		2.7	67	2
50 ST JOSEPH ST	1,003		2.3	75,460		2.3	55	2
<i>Active Projects</i>	20,759	48.4	%	1,703,850		52.2		
325 GERRARD ST E	4,705		11.0	469,000		14.4	29	36
55 LAKE SHORE BLVD E	4,369		10.2	340,296		10.4	90	7
266-270 KING ST W	1,953		4.6	138,008		4.2	92	2
261 QUEENS QUAY E**	1,833		4.3	124,565		3.8	4	9
571 DUNDAS ST W	1,823		4.2	199,464		6.1	21	17
177 FRONT ST E	1,531		3.6	107,480		3.3	29	3
6 GLEN RD	1,321		3.1	99,693		3.1	45	4
578 FRONT ST W	1,191		2.8	76,569		2.3	20	4
37 YORKVILLE AVE	1,029		2.4	94,525		2.9	62	1
200 DUNDAS ST E	1,004		2.3	54,250		1.7	45	1
<i>Projects Under Review</i>	18,374	42.8	%	1,312,206		40.2		
1 YONGE ST	2,864		6.7	215,668		6.6	95	4
433 FRONT ST W	2,750		6.4	208,300		6.4	59	0
429 LAKE SHORE BLVD E	2,280		5.3	153,960		4.7	55	13
33 GERRARD ST W	2,138		5.0	127,122		3.9	88	4
400 FRONT ST W	1,937		4.5	144,739		4.4	59	4
245 QUEEN ST E	1,820		4.2	130,797		4.0	56	2
23 SPADINA AVE	1,400		3.3	106,200		3.3	69	1
88 QUEEN ST E	1,126		2.6	85,666		2.6	49	3
2 CARLTON ST	1,046		2.4	68,140		2.1	73	1
309 CHERRY ST	1,013		2.4	71,614		2.2	52	3

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

Development projects with activity between January 1, 2013 and December 31, 2017. 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.

*Residential portion of a phased project originally submitted as 16 York St.

** Complete Residential GFA information for 261 Queens Quay E is not yet available

A notable amount of non-residential activity is occurring in *Downtown*. In the current Pipeline, there are 24 large projects, each proposing over 50,000 m² of non-residential GFA in the *Downtown and Central Waterfront* area. The proposed non-residential GFA of each of these projects is listed in Table 9 on page 13. 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 Phase II section of the MaRS research and innovation hub at 661 University Avenue;

- the ongoing Union Station Revitalization at 61 Front Street; and
- the approved new courthouse at 11 Centre Avenue.

These projects are in addition to 352 other projects in *Downtown* proposing less than 50,000 m² of non-residential floor space.

Table 9: Projects Proposing ≥50,000 m² Non-Residential GFA

	Project Location	Proposed Non-Residential GFA (m ²)	Percent
City of Toronto		10,296,517	100.0
Proposed Non-Residential GFA ≥50,000 m²		4,522,694	43.9
<i>Built Projects</i>		<i>945,970</i>	<i>20.9</i>
1201 WILSON AVE	Outside Growth Areas	197,884	4.4
120 BREMNER BLVD	Downtown	98,995	2.2
40 ADELAIDE ST W*	Downtown	94,124	2.1
100 ADELAIDE ST W	Downtown	86,960	1.9
90 HARBOUR ST	Downtown	86,610	1.9
10-20 BAY ST	Downtown	81,772	1.8
661 UNIVERSITY AVE**	Downtown	66,974	1.5
61 FRONT ST W ***	Downtown	65,861	1.5
333 KING ST E****	Downtown	60,028	1.3
674 BAY ST	Downtown	55,615	1.2
30 WESTON RD	Employment Areas	51,147	1.1
<i>Active Projects</i>		<i>1,340,001</i>	<i>29.6</i>
440 FRONT ST W	Downtown	149,163	3.3
45 BAY ST	Downtown	143,196	3.2
141 BAY ST	Downtown	134,397	3.0
156 FRONT ST W	Downtown	115,515	2.6
2233 SHEPPARD AVE W	Employment Areas	102,977	2.3
171 FRONT ST W	Downtown	100,200	2.2
629 EASTERN AVE	Employment Areas	96,715	2.1
880 BAY ST	Downtown	80,622	1.8
55 LAKE SHORE BLVD E	Downtown	80,409	1.8
388 KING ST W	Downtown	74,736	1.7
16 YORK ST*****	Downtown	74,392	1.6
11 CENTRE AVE	Downtown	73,530	1.6
158 STERLING RD	Employment Area	59,857	1.3
1001 QUEEN ST W	Avenues	54,292	1.2
<i>Projects Under Review</i>		<i>2,236,724</i>	<i>49.5</i>
21 DON VALLEY PKWY	Employment Areas	925,314	20.5
25 KING ST W	Downtown	180,259	4.0
82 BUTTONWOOD AVE	Avenues	168,845	3.7
3401 DUFFERIN ST	Outside Growth Areas	160,066	3.5
433 FRONT ST W	Downtown	155,700	3.4
1 YONGE ST	Downtown	141,175	3.1
865 YORK MILLS RD	Employment Areas	85,399	1.9
844 DON MILLS RD	Employment Areas	84,176	1.9
721 EASTERN AVE	Employment Areas	81,925	1.8
900 YORK MILLS RD	Employment Areas	78,495	1.7
40 TEMPERANCE ST*****	Downtown	75,322	1.7
517 WELLINGTON ST W	Downtown	50,030	1.1
2200 ISLINGTON AVE	Employment Areas	50,018	1.1
Proposed Non-Res GFA between 10,000 m² and 49,999 m²		3,358,508	32.6
Proposed Non-Res GFA less than 10,000 m²		2,415,314	23.5

Source: City of Toronto, City Planning: Land Use Information System II. Development projects with activity between January 1, 2013 and December 31, 2017. Built projects are those which became ready for occupancy and/or were completed. Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or those which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal. Gross floor area values are expressed in square metres. * Phase 2 of a larger 3 phase including 40 Adelaide St. W, 40 Temperance St. and 333 Bay st. project **Second phase of the MARS project ***Union Station Revitalization project has become partially ready for occupancy although substantial work is still outstanding. ****First phase of this project is ready for occupancy but the second phase has yet to be submitted. Gross floor area includes both phases. *****Phase 3 of a larger 3 phase project. *****Phase 3 of a larger 3 phase including 40 Adelaide St. W, 40 Temperance St. and 333 Bay st. project

Map 5 shows a strong north-south trend of recent non-residential development between University Avenue and Yonge Street, with the largest built projects located in this corridor. There has been a shift in the non-residential market towards a more east-west pattern of development, with all of the largest active projects and projects under review proposed south of Dundas Street. Many of these are large, phased, 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. They are vital to the City's growth management strategy. There are 95 projects in the development Pipeline that are located in the *Centres* and which contain 9.5% of the city's proposed residential units. About 35,623 units as well as 274,709 m² of non-residential GFA proposed in the *Centres*. Since, 80% of proposed residential units and 69% of the proposed non-residential GFA in the *Centres* are either approved but not yet built or under review, 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 developments with an average of 375 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 303 units per residential project.

Strong residential development activity is occurring within the boundaries of *Yonge-Eglinton Centre*. With 14,567 units proposed, *Yonge-Eglinton Centre* contains over 40% of the residential units in the Pipeline within the *Centres*. Non-residential development in the *Centres* is strongest in *North York Centre* where there is 110,719 m² of non-residential GFA in the

Pipeline or 40% of all non-residential GFA proposed within the *Centres*. More than 40% 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 81,501 units and 698,670 m² of non-residential GFA proposed in the development Pipeline. This represents 22% of the city's proposed units and 7% of its proposed non-residential GFA.

Roughly equal numbers of residential units are active and under review totalling nearly double the amount of units that were built in *Avenues* over the past five years. This includes a number of 1,000+ unit projects with multiple phases and with some Planning approvals which will continue through approval processes and construction for several years. This trend points to an ongoing strength in residential development along the *Avenues*.

Nearly half of all non-residential development is under review compared to that which is active or built. Some 328,100 m² or 47% of proposed non-residential GFA in the *Avenues* is still under review or appealed indicating that there is likely to be substantial non-residential construction in the years to come.

Other Mixed Use Areas

Outside of *Downtown*, the *Centres* and the *Avenues*, there are numerous other locations throughout the city that are designated as *Mixed Use Areas*, 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 55,873 units and 976,274 m² of non-residential GFA proposed. This accounts for 15%

of the city's proposed residential units and 10% of its proposed non-residential GFA. Over 80% of the proposed residential units in these areas are either under review or active whereas the proposed non-residential development is more evenly split between the built, active, and under review statuses, indicating future residential construction activity in these areas near term.

All Other Areas

Nearly 63,400 units or 17% 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 proposing fewer than 100 units on average, in areas designated as Neighbourhoods. Nearly half (45%) of the residential units proposed in All Other Areas are under review (see Table 4).

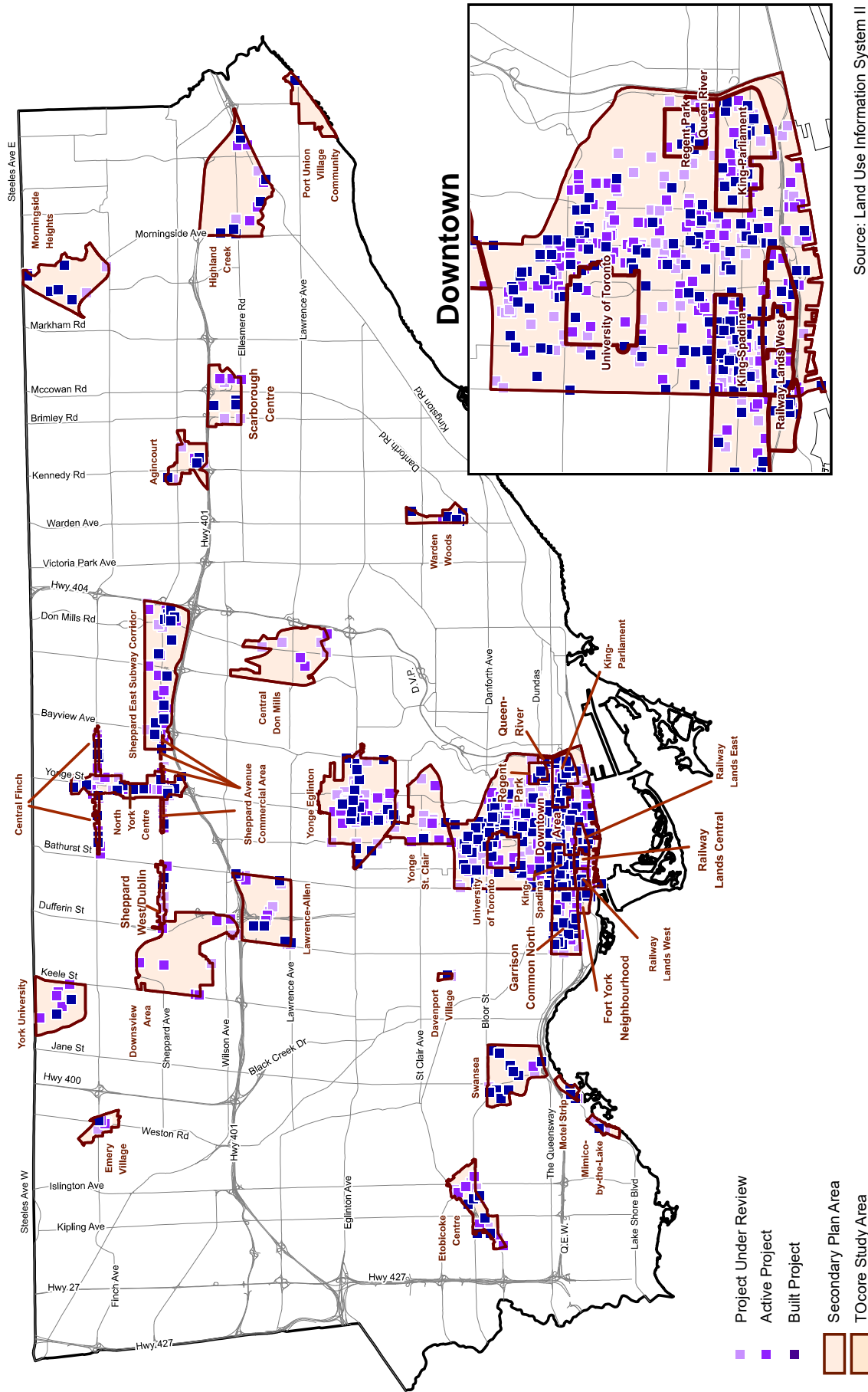
There is 4.3 million m² of non-residential GFA proposed in these Other Areas. Three-quarters of this 3.15 million m² is located in the *Core* or *General Employment Areas* which the Official Plan also targets for non-residential growth. Half (51%) of non-residential GFA proposed in All Other Areas are under review.

Secondary Plan Areas

Secondary Plans 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 for *Downtown*, the *Centres* and the *Avenues*. Map 6 (on page 15) displays the areas of the in-force Secondary Plans and the locations of development projects within each one.

As seen in Table 10, 869 projects or 36% of all projects in the Pipeline are proposed in Secondary Plan areas. These projects propose 242,140 residential units and 5.26 million m² of

Map 6: City of Toronto Development Projects in Secondary Plan Areas



Source: Land Use Information System II

Development projects with activity between January 1, 2013 and December 31, 2017.
 Built projects are those which became ready for occupancy and/or were completed.
 Active projects are those which have been applied for or have been issued, and those which are under construction.
 Projects under review have not yet been approved or refused, or are under appeal.

Active projects are those which have been approved, for which Building Permits have been issued, and those which are under construction.

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Table 10: Proposed Development in Secondary Plan Areas

			Proposed Residential		Proposed Non-Residential	
	Number of Projects	%	Units	%	GFA (m ²)	%
City of Toronto	2,407		376,480		10,296,517	
Secondary Plans	869	36.1	242,140	64.3	5,263,590	51.1
Secondary Plans	Number of Projects	%	Proposed Residential Units	%	Proposed Non-Residential GFA (m²)	%
Secondary Plans within Downtown	440	50.6	135,505	56	3,970,197	75
King-Parliament	40	4.6	12,984	5.4	254,663	4.8
King-Spadina	91	10.5	28,123	11.6	661,808	12.6
Railway Lands Central	3	0.3	4,150	1.7	170,846	3.2
Railway Lands East	8	0.9	2,049	0.8	534,010	10.1
Railway Lands West	8	0.9	2,853	1.2	20,085	0.4
Regent Park	9	1.0	6,133	2.5	23,019	0.4
Queen River	4	0.5	1,217	0.5	6,518	0.1
University of Toronto	11	1.3	1,277	0.5	51,012	1.0
Downtown Plan	266	30.6	76,719	31.7	2,248,235	42.7
Secondary Plans outside Downtown						
Agincourt	8	0.9	8,414	3.5	44,363	0.8
Central Don Mills	7	0.8	2,381	1.0	38,371	0.7
Central Finch	26	3.0	523	0.2	5,143	0.1
Davenport Village	4	0.5	1,281	0.5	0	0.0
Downsview Area	9	1.0	1,355	0.6	76,626	1.5
Emery Village	5	0.6	1,686	0.7	2,948	0.1
Etobicoke Centre	21	2.4	4,070	1.7	21,384	0.4
Fort York Neighbourhood	10	1.2	3,258	1.3	29,721	0.6
Garrison Common North	45	5.2	11,896	4.9	246,594	4.7
Highland Creek	16	1.8	174	0.1	76,132	1.4
Lawrence-Allen	18	2.1	4,834	2.0	202,986	3.9
Mimico-by-the-Lake	3	0.3	373	0.2	3,704	0.1
Morningside Heights	8	0.9	157	0.1	25,583	0.5
Motel Strip	8	0.9	5,229	2.2	23,532	0.4
North York Centre	30	3.5	7,647	3.2	110,719	2.1
Port Union Village Community	1	0.1	101	0.0	0	0.0
Scarborough Centre	9	1.0	9,339	3.9	53,006	1.0
Sheppard Avenue Commercial Area	13	1.5	513	0.2	10,304	0.2
Sheppard East Subway Corridor	48	5.5	15,388	6.4	59,800	1.1
Sheppard West/Dublin	12	1.4	1,117	0.5	8,298	0.2
Swansea	13	1.5	2,295	0.9	10,434	0.2
Warden Woods	8	0.9	593	0.2	9,300	0.2
Yonge-Eglinton*	83	9.6	21,659	8.9	164,823	3.1
Yonge St. Clair	17	2.0	1,865	0.8	20,727	0.4
York University	7	0.8	487	0.2	48,896	0.9
Status	869	100.0	242,140	100.0	5,263,590	100.0
Built	273	31.4	63,434	26.2	1,377,910	26.2
Active (approved but not yet built)	296	34.1	97,433	40.2	2,102,630	39.9
Under Review (not approved)	300	34.5	81,273	33.6	1,783,049	33.9

Source: City of Toronto, City Planning : Land Use Information System II.
 Development projects with activity between January 1, 2013 and December 31, 2017. 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. 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 1, 2, and 3 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. *Yonge Eglinton Secondary Plan geography is currently under review.

non-residential GFA. This represents 64% of the residential units and more than half (51%) of the non-residential GFA proposed in the entire city. There are slightly more active projects proposing residential units (40%) than under review (34%) in the Secondary Plan Areas versus those that are built (26%). Almost two thirds of the proposed non-residential development in Secondary Plan Areas is active or under review.

Some areas covered by a Secondary Plan fall outside of the other growth areas reported on earlier in this bulletin. There are 15,615 residential units and 387,473 m² of non-residential GFA proposed in All Other Areas of the city. If this development were added to the development proposed in *Downtown, Centres, Avenues*, and other *Mixed Use Areas*, 87% of the residential units and 62% of the non-residential GFA in the Pipeline would be proposed in either a growth management area or a Secondary Plan area. If non-residential development in *Employment Areas* is also included, the percentage of non-residential development occurring in an area targeted for growth rises to 93%.

The Downtown Area Plan

The Downtown Plan was adopted by Council with amendments at its meeting on May 22nd, 23rd and 24th, 2018. This new Secondary Plan area for *Downtown* (excluding the *Central Waterfront* area) provides an updated growth management framework for this rapidly changing area.⁴

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

The Downtown Plan is the largest Secondary Plan in the city and it is unique as a local and national

economic hub. Table 10 and Map 6 show that the Downtown Plan area contains 8 Secondary Plans within its borders as well as a portion of the proposed Central Waterfront Secondary Plan Area. The Downtown Plan area contains the greatest number of development projects of all the Secondary Plan areas (440), proposing 135,505 residential units, accounting for 56% of all residential units proposed in Secondary Plan areas and 36% of all proposed residential units in the city. The new Downtown Plan area contains nearly 4 million m² of non-residential GFA accounting for 75% of all proposed non-residential GFA in Secondary Plan areas.

Secondary Plan Areas within the Downtown Plan Area

The King-Spadina Secondary Plan area continues to attract a significant amount of development activity in the current Pipeline with 28,123 residential units and 661,808 m² of non-residential GFA proposed in this area. The King-Spadina Secondary Plan area, which is located within the Downtown Plan area, runs from Bathurst Street in the west to John Street and Simcoe Street in the east, and between Queen Street West in the north and Front Street West in the south. 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.⁵

The Railway Lands East Secondary Plan has also undergone significant non-residential development, with 534,010 m² or 10% of the non-residential GFA proposed in all the Secondary Plan areas. This Plan is located between John Street and Yonge Street, Front Street West 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.⁶

Selected Secondary Plan Areas Outside Downtown and Central Waterfront

In addition to the Downtown Plan, the Yonge-Eglinton Secondary Plan is currently under review through the Midtown in Focus Study.⁷

The proposed Yonge-Eglinton Secondary Plan area proposes changes to the existing Secondary Plan boundary, resulting in an area 9% smaller. Despite this reduced geography, the proposed Yonge-Eglinton Secondary Plan area contains the most development projects outside of the *Downtown and Central Waterfront* area, accounting for nearly 22,000 proposed residential units and 164,823 m² of non-residential GFA. The proposed Yonge-Eglinton Secondary Plan area accounts for 9% of proposed residential units within all Secondary Plan areas.

The Garrison Common North Secondary Plan has successfully attracted a mix of residential and non-residential development, in accordance with one of the Plan's major objectives to include a variety of proposed land uses.⁸ The area, which includes Liberty Village and the CAMH Queen Street site, contains 5% of the proposed residential units and 5% of the proposed non-residential GFA in all Secondary Plan Areas. The Sheppard East Subway Corridor Secondary Plan area has also attracted a significant amount of development, with 15,388 residential units proposed. Non-residential development is also occurring in this area, to a lesser extent.

Employment Areas

What are Employment Areas?

Toronto's *Employment Areas* "are places of business and economic activity vital to Toronto's economy and future economic prospects."⁹ In 2011, the City commenced its Municipal Comprehensive Review (MCR) of employment lands as required by

the *Places to Grow Act*.¹⁰ The MCR concluded in 2013, with Council's adoption of Official Plan Amendment 231 (OPA 231)¹¹ which received Ministerial approval in part (with minor modifications) in July 2014.

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

Development in Employment Areas

The Development Pipeline covers development activity during the years 2013 to 2017. Prior to June 2015, *Employment Districts* were part of Toronto's Urban Structure as described in Chapter 2 of the Official Plan. In June 2015 the Ontario Municipal Board approved parts of OPA 231, deleting the term *Employment Districts* within Chapter 2 and regarding the Urban Structure and replacing it with the term *Employment Areas*. As such, this bulletin outlines development activity in the designated *Employment Areas*.

There is a long-standing trend towards North American metropolitan areas losing manufacturing activities to suburban locations over time.¹² Previously; Toronto had been no different than these other cities. Employment in the Manufacturing sector in Toronto had been decreasing almost every year since 1983, from 22% to 8% of all jobs in 2016.¹³ However, the 2017 Toronto Employment Survey reported an increase in Manufacturing employment adding 8,260 jobs over 2017 and growing by 6.7%. In 2017, the Manufacturing sector accounted for 21% 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 in *Employment Areas* has grown and diversified.

Employment Areas are attractive locations for the creation of new businesses, with 32% of new establishments in the city in 2017 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.

Between 2013 and 2017, *Employment Areas* contained 3.15 million m² or 31% of the city's proposed non-residential GFA (see Maps 7 and 8 on pages 19 and 20 and Table 11 on page 21). By 2017 year-end, 36% of these projects had been built, which amounts to 566,522 m² of new, non-residential floor space in 107 different projects.

As development progresses on projects that have been approved, another 791,528 m² of non-residential GFA in 106 projects are expected to be constructed in *Employment Areas*. A further 82 projects with 1,793,378 m² of non-residential GFA is under review and may eventually be approved and constructed in *Employment Areas*.

Core and General Employment Areas

In December 2016, the Ontario Municipal Board issued a partial approval of OPA 231, bringing into effect the *Core Employment Area* and *General Employment Area* land use designations. *Core Employment Areas* are, for the most part, geographically located within the interior of *Employment Areas*. Uses that would attract the 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 businesses the certainty of uses surrounding their operations. Uses permitted in *Core Employment Areas* are all types of manufacturing, processing, warehousing, wholesaling, distribution, storage, transportation facilities, vehicle repair and services, offices,

research and development facilities, utilities, waste management systems and vertical agriculture.¹⁷

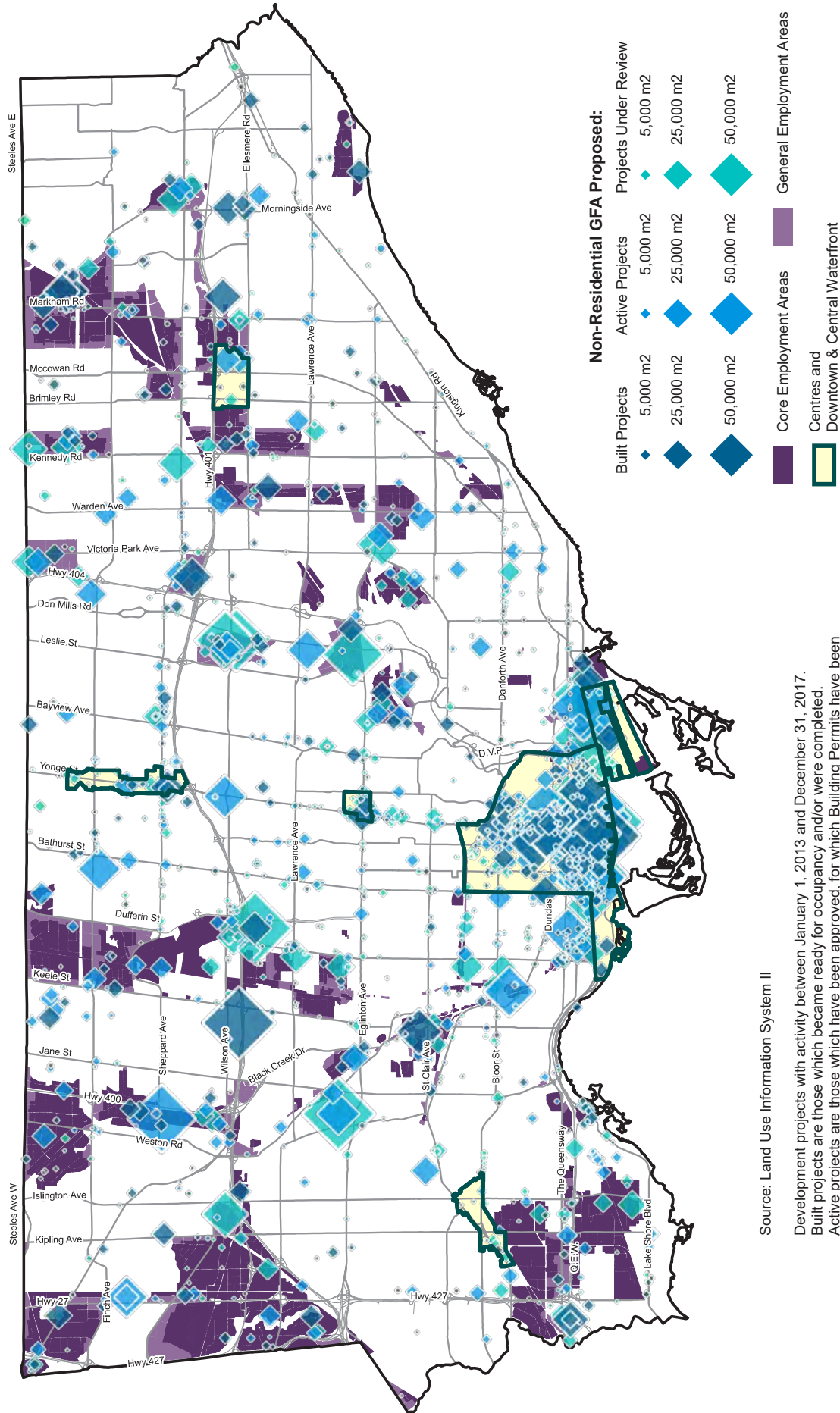
General Employment Areas are usually located on the periphery of *Employment Areas* on major roads where retail stores, service shops and restaurants can serve workers in the *Employment Areas* and would also benefit from visibility and transit access to draw the broader public. Uses permitted in *General Employment Areas* include all those permitted in *Core Employment Areas*, as well as restaurants, retail and service uses.¹⁸

In *Core Employment Areas*, the non-residential GFA proposed between 2013 and 2017 is roughly equal across the three statuses of built, active, and under review, indicating steady development interest and investment 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. The projects under review are proposing two and a half times as much non-residential GFA compared to that in the built and active projects. This points to the market's continued interest in non-residential GFA. The varying market demands demonstrate the need to preserve the city's employment lands for business and future job growth.

Sectoral Composition

The *Employment Areas* provide an attractive location for employment related development projects. The projects proposed in the *Employment Areas* are primarily comprised of proposed office GFA (39%), industrial GFA (23%) and retail GFA (20%).

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



Source: Land Use Information System II

Development projects with activity between January 1, 2013 and December 31, 2017.

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

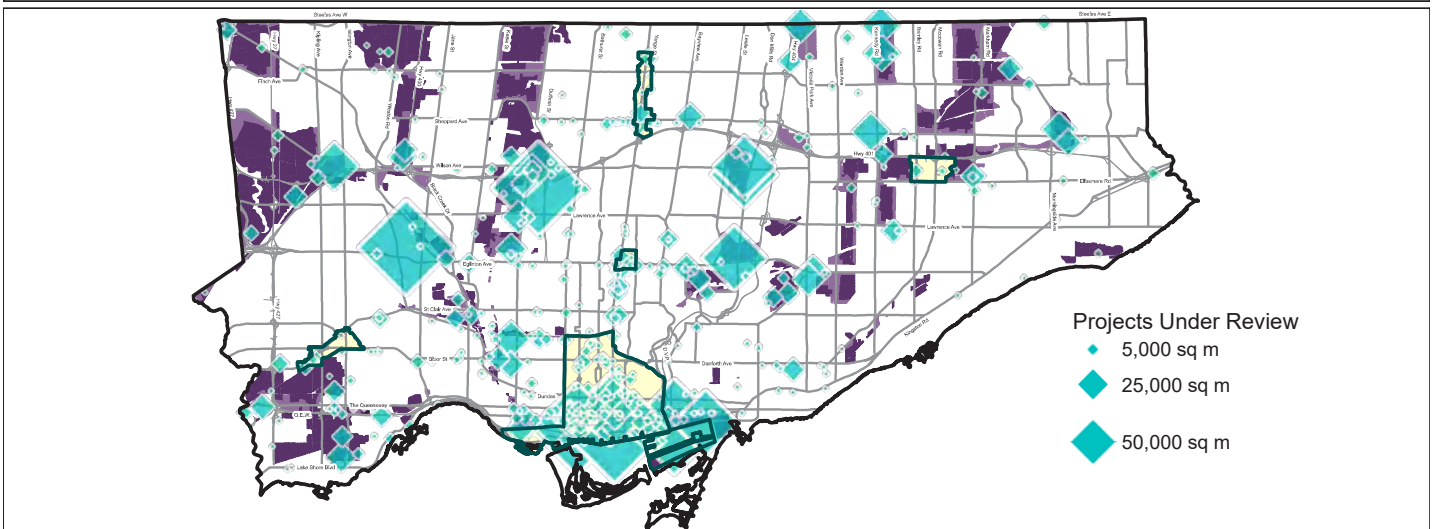
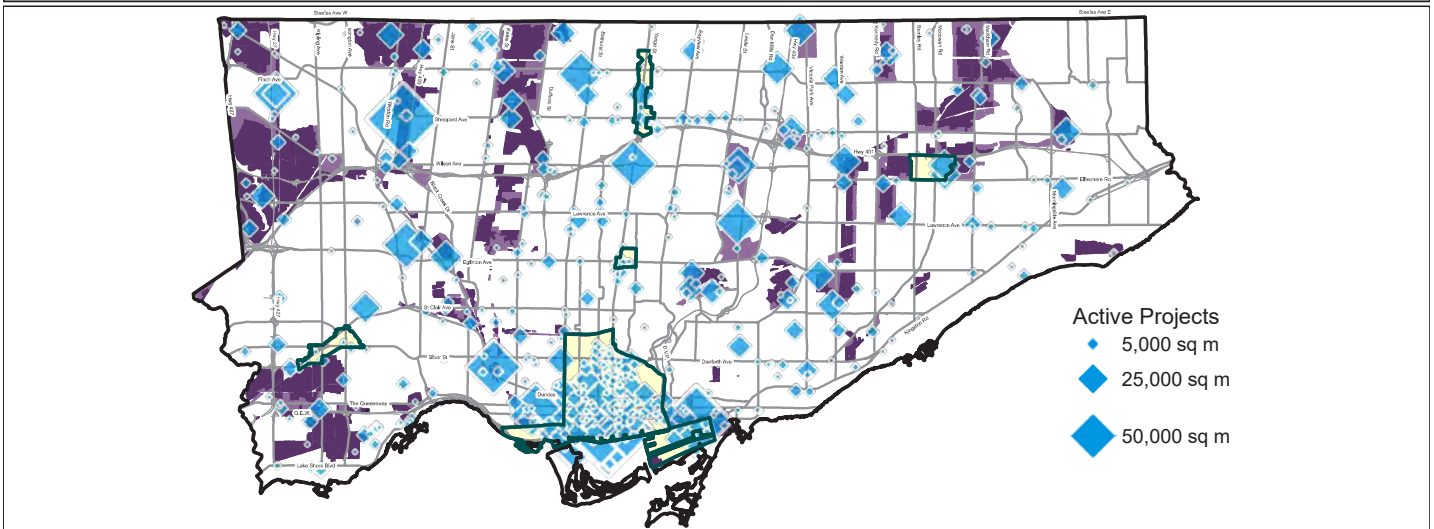
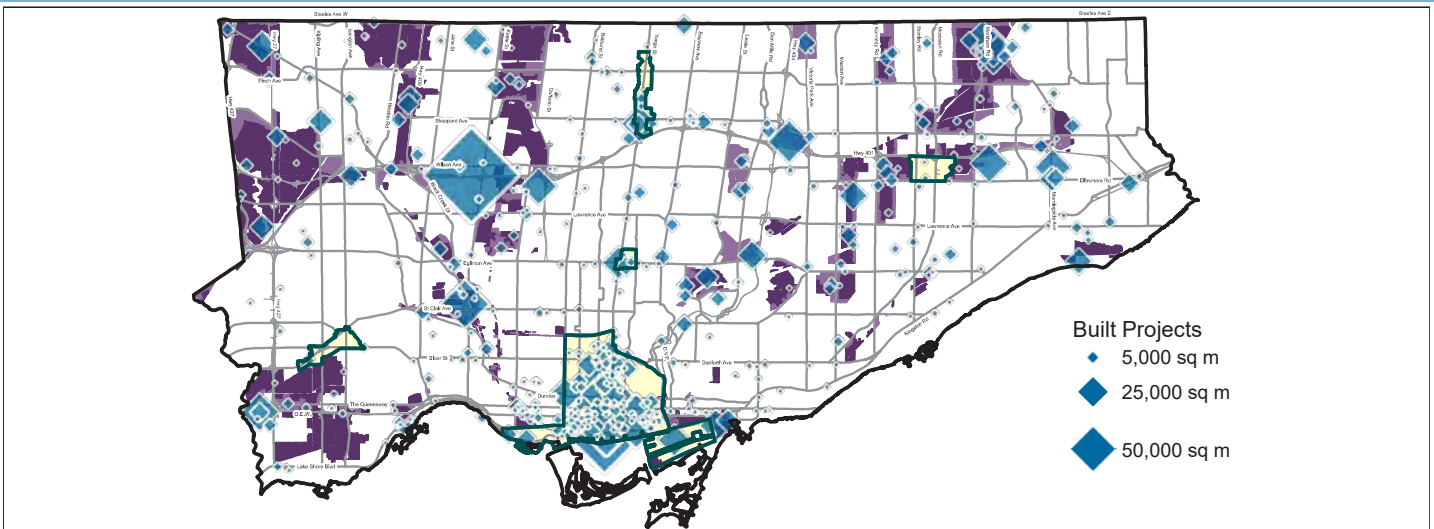
Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or those which are under construction. Projects under review

are those which have not yet been approved or refused and those which are under appeal.

Toronto City Planning Division, Research and Information - June 2018



Map 8: City of Toronto Proposed Non-Residential Development



Source: Land Use Information System II
 Development projects with activity between January 1, 2013 and December 31, 2017.
 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.

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



Table 11: Proposed Development in Employment Areas by Status

	Projects		Proposed Non-Residential Gross Floor Area		
	Number	Percent	Number	Percent	
City of Toronto	2,407		10,296,517	100.0	
Total Employment Areas	295	100.0	3,151,428	30.6	100.0
Built	107	36.3	566,522		18.0
Active	106	35.9	791,528		25.1
Under Review	82	27.8	1,793,378		56.9
Within Employment Lands	295	100.0	3,151,428	100.0	
Core Employment Areas	157	53.2	1,225,978	38.9	100.0
Built	51	32.5	279,304		22.8
Active	61	38.9	527,679		43.0
Under Review	45	28.7	418,995		34.2
General Employment Areas	138	46.8	1,925,450	61.1	100.0
Built	56	40.6	287,218		14.9
Active	45	32.6	263,849		13.7
Under Review	37	26.8	1,374,383		71.4

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

Development projects with activity between January 1, 2013 and December 31, 2017. Built projects are those which became ready for occupancy and/or were completed. Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or those which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal. Gross floor area values are expressed in square metres.

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

The majority of retail GFA proposed for *Employment Areas* is concentrated in *General Employment Areas*.

Employment Areas continue to provide an attractive location for projects which include industrial GFA. The current Pipeline contains 865,174 m² of proposed new industrial GFA, 84% of which is located in the *Employment Areas*. The majority of the industrial GFA, 89%, is proposed in *Core Employment Areas* while 11% is proposed in *General Employment Areas*.

In *Core Employment Areas*, over half of all proposed GFA is industrial totalling 644,505 m². About 80% of all GFA built in *Core Employment Areas* over the last five years is industrial GFA accounting for 218,322 m² of industrial GFA (see Figure 5). An additional 161,506 m² of proposed industrial GFA is under review.

Employment Areas provide an attractive location for office-related projects. About 39% of all proposed GFA in the *Employment Areas* is proposed office GFA, accounting for 1.2 million m². While both *Core and General Employment Areas* attract

Table 12: Proposed GFA in Employment Areas by Type

	Total Non-Residential		Industrial		Office		Retail		Other	
	Number	%	Number	%	Number	%	Number	%	Number	%
Total Employment Areas	3,151,428	100.0	727,707	100.0	1,219,043	100.0	645,661	100.0	559,017	100.0
Built	566,522	18.0	259,013	35.6	67,577	5.5	158,126	24.5	81,806	14.6
Active	791,528	25.1	286,165	39.3	139,960	11.5	170,708	26.4	194,695	34.8
Under Review	1,793,378	56.9	182,529	25.1	1,011,506	83.0	316,827	49.1	282,516	50.5
Core Employment	1,225,978	38.9	644,505	88.6	271,983	22.3	82,853	12.8	226,637	40.5
Built	279,304	22.8	218,322	33.9	35,738	13.1	16,668	20.1	8,576	3.8
Active	527,679	43.0	264,677	41.1	110,845	40.8	34,543	41.7	117,614	51.9
Under Review	418,995	34.2	161,506	25.1	125,400	46.1	31,642	38.2	100,447	44.3
General Employment	1,925,450	61.1	83,202	11.4	947,060	77.7	562,808	87.2	332,380	59.5
Built	287,218	14.9	40,691	48.9	31,839	3.4	141,458	25.1	73,230	22.0
Active	263,849	13.7	21,488	25.8	29,115	3.1	136,165	24.2	77,081	23.2
Under Review	1,374,383	71.4	21,023	25.3	886,106	93.6	285,185	50.7	182,069	54.8

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

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