



This bulletin illustrates how the City has developed and how it will 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, 2013 and December 31, 2017. This development pipeline data is supplemented by other data sources such as CMHC, Statistics Canada and the Toronto Employment Survey.



June 2018

Highlights

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

- From 2013 to 2017, 376,480 residential units were proposed and for the first time, over 10 million m² of non-residential GFA was proposed in the city of Toronto.
- There are 12,621 more units and 764,711 m² more non-residential GFA in this pipeline compared to that reported on in the last *How Does the City Grow?* bulletin. New projects submitted in 2017 are proposing more development than the average over the previous five years and revisions to older projects have increased in size.
- 37% of new residential development is proposed in areas targeted for growth by the City's Official Plan.
- 290,039 residential units and 7.73 million m² of non-residential GFA proposed have not yet been built.
- The most growth was proposed in the *Downtown & Central Waterfront*, with 37% of the units and 40% of the non-residential GFA proposed in the city.
- Among the *Centres*, *Yonge-Eglinton Centre* has the most residential activity with 41% of the units proposed in the *Centres*. *North York Centre* led non-residential development with 40% of all non-residential activity in the *Centres*.
- 31% of the proposed non-residential GFA is in the *Employment Areas*.
- 64% of the proposed residential units are located in an area covered by a *Secondary Plan*.
- 727,707 m² of industrial GFA is proposed in the *Employment Areas*, accounting for 84% of proposed industrial GFA in the city.
- 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 came into force in June 2006 and is the guide for development in the city over the next few decades. While gradual intensification occurs across the city, 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 residential and employment growth are those identified in the Official Plan's Urban Structure Map as *Avenues*, *Centres* and *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.

Toronto's Proposed Development Pipeline

What is the Development Pipeline?

The City of Toronto's Development Pipeline consists of all development projects in the City of Toronto that have been active over the last five years. This provides a lens through which to monitor Toronto's near-term housing supply. The current Development Pipeline consists of all of the projects for which there has been development activity over the last five years, between January 1, 2013 and December 31, 2017. Development activity refers to progress at any stage of the approvals and development processes, including: applications submission, review, approval, Building Permit application, Building Permit issuance, construction, occupancy, and completion. The development Pipeline provides an extensive representation of development activity within the city. Previous versions of the Pipeline before 2016 are not directly comparable.

Projects are categorized into three general statuses, based on the stage of development they reached between January 1, 2013 and December 31, 2017. Built projects are those which became ready for occupancy and/or were completed during the period. Active projects are those which have received at least one Planning approval but which have not yet been built. This includes projects with approved Official Plan Amendments

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How Does the City Grow?

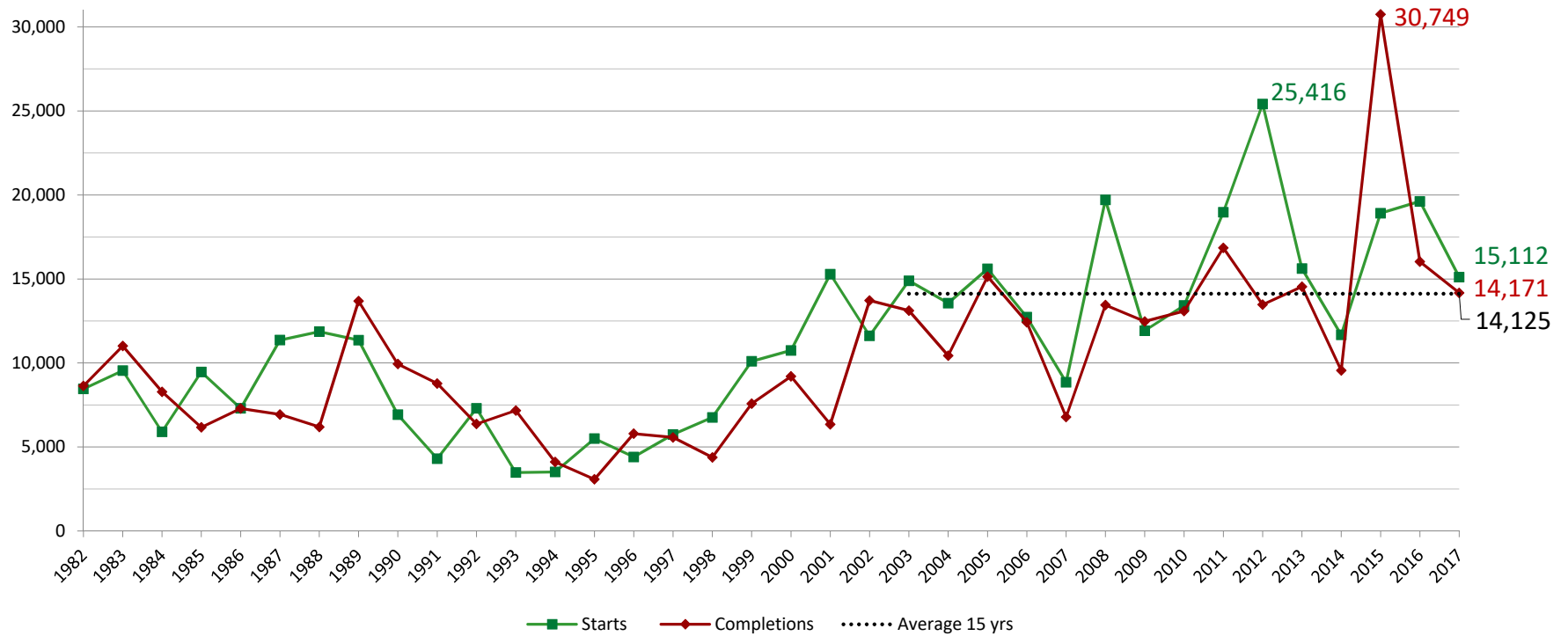
Update 2018
 Planning & Growth Management
 Committee
 05 July 2018



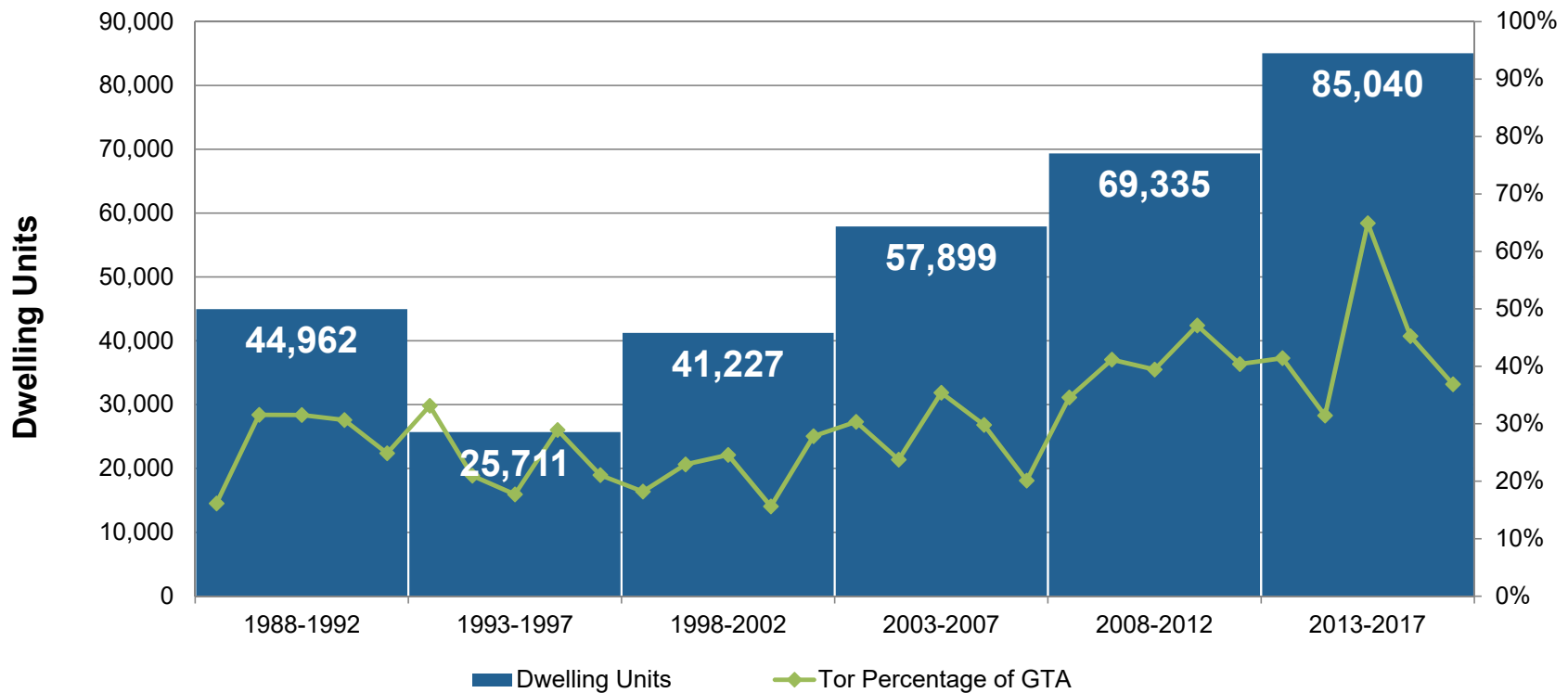


Historical Activity

Toronto Housing Starts and Completions



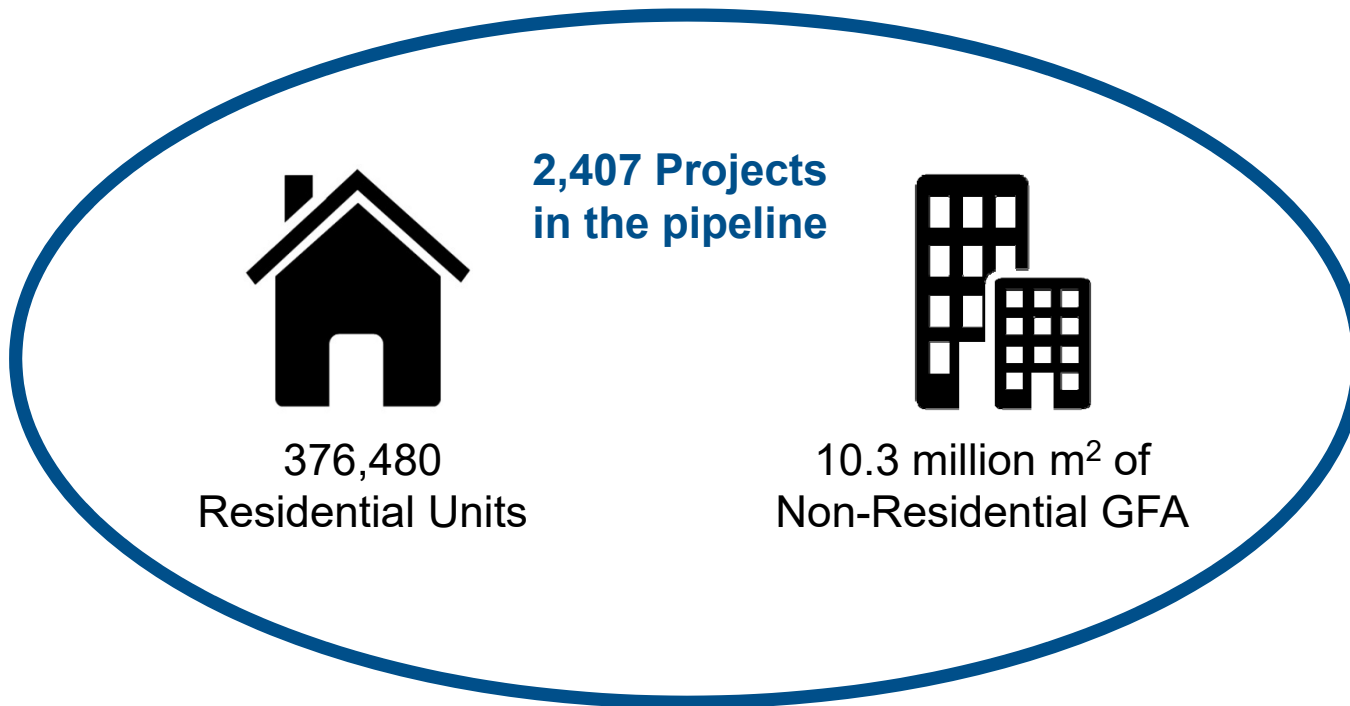
Toronto Housing Starts and Completions





Development Pipeline

Development Pipeline

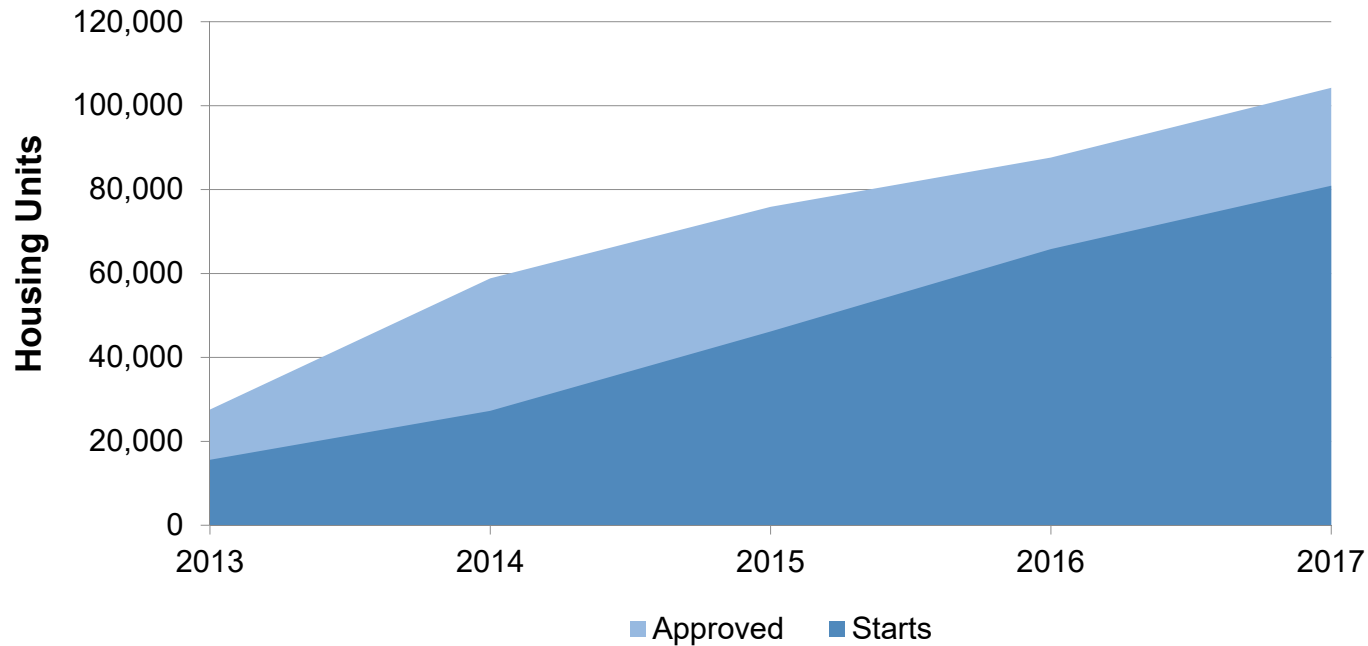


Proposed Residential Units by Status and Stage

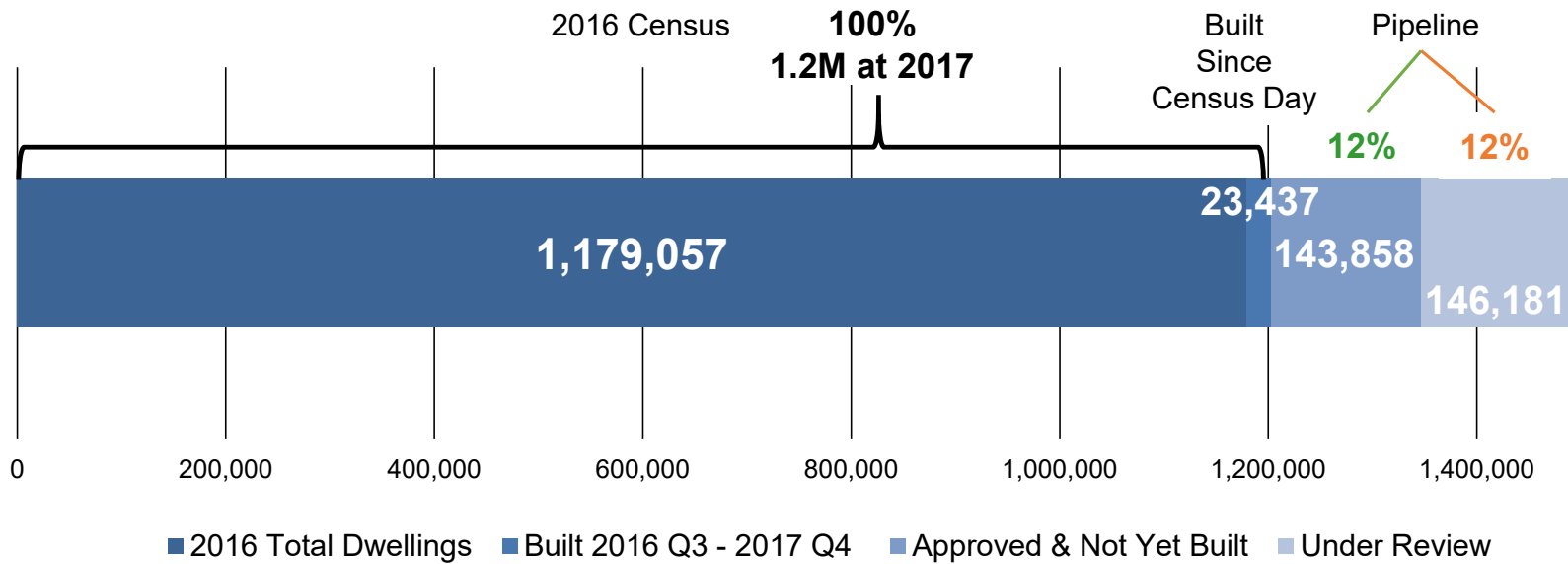
Status	Stage as of December 31, 2017		Proposed Residential Units	
	Stage	Description	Number	Percent
Under Review	1	Planning Application Submitted	146,181	39%
	2	Delegated / Council Approval	51,486	14%
Active	3	Permit Application	40,859	11%
	4	Issuance of a Permit	5,807	2%
	5	Work Stated	45,706	12%
Built	6	Ready for Occupancy	59,642	16%
	7	Work Completed	26,799	7%
Total			376,480	100%

Residential Approvals have outpaced Residential Starts over the last 5 years

Cumulative Housing Unit Approvals versus Housing Starts
in Toronto 2013-2017



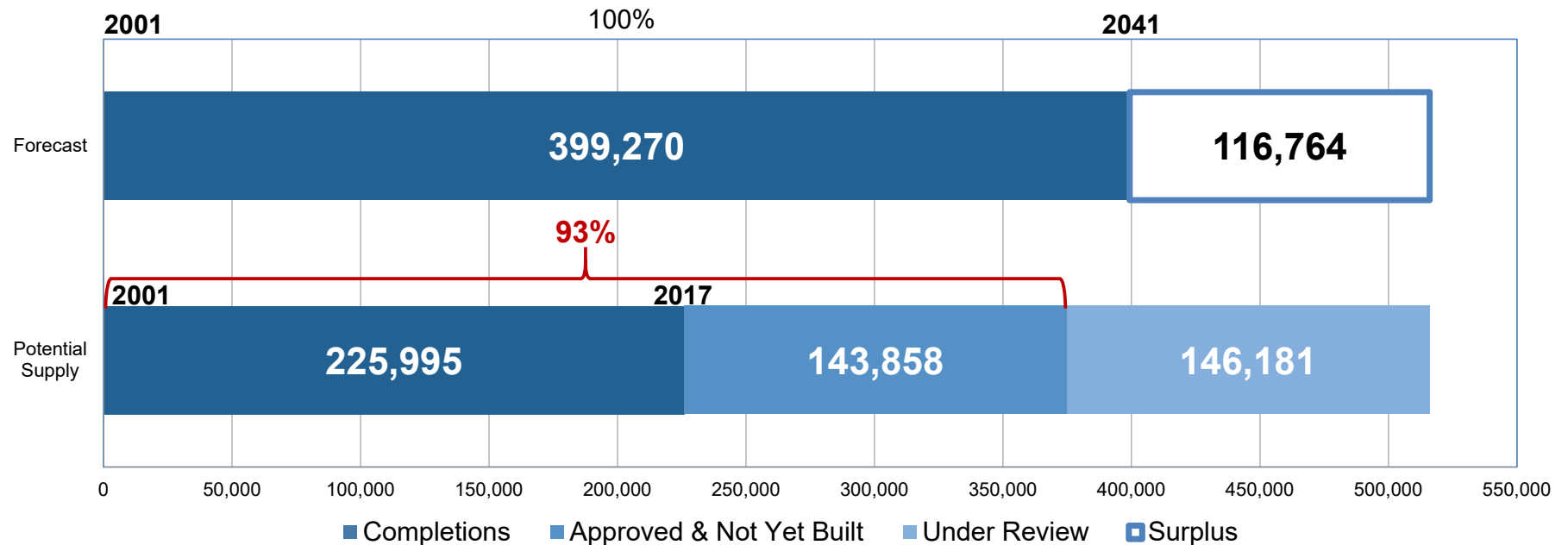
Potential Dwelling Supply



If the total potential housing were built, the City's total housing stock would rise by one quarter.

Growth Plan Forecast

Toronto's housing growth is on track



Toronto is well on its way to housing the population growth forecasted by the Growth Plan

Completions are units for which all the proposed construction work on a dwelling unit has been performed. Units approved and not yet build are those in development projects that have received at least their first Planning approval. Submitted units are those in projects which have not yet been approved or refused and those which are under appeal.

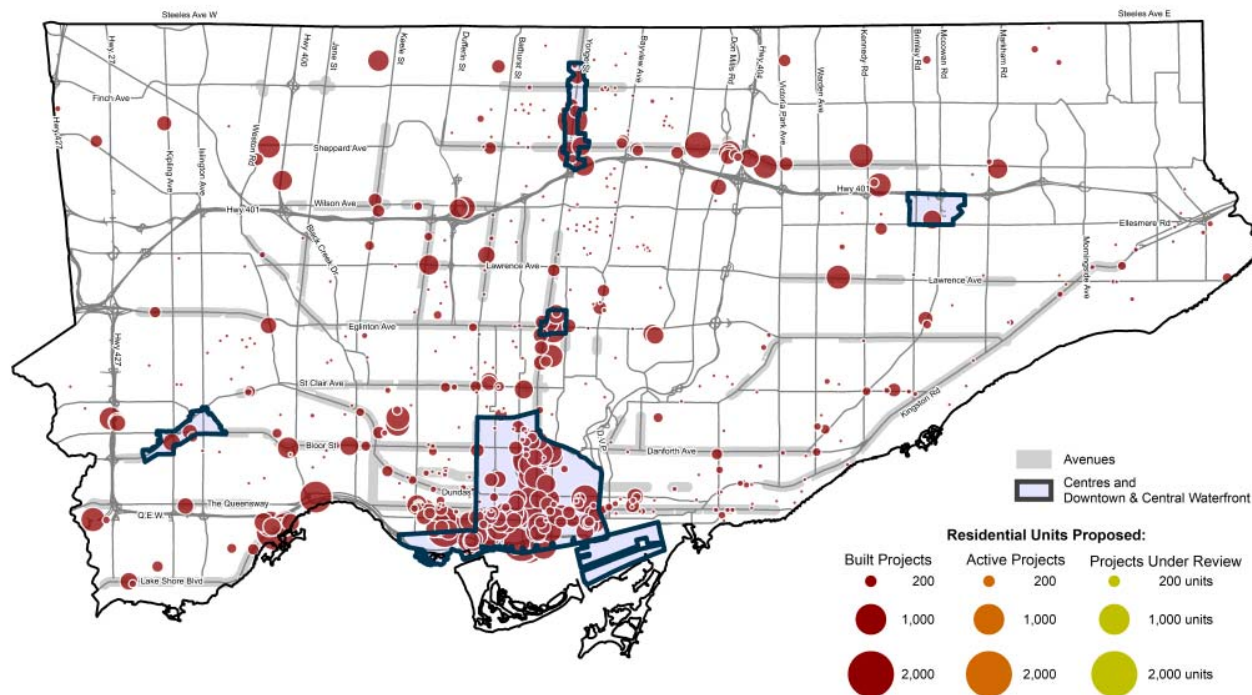




Citywide Development Activity

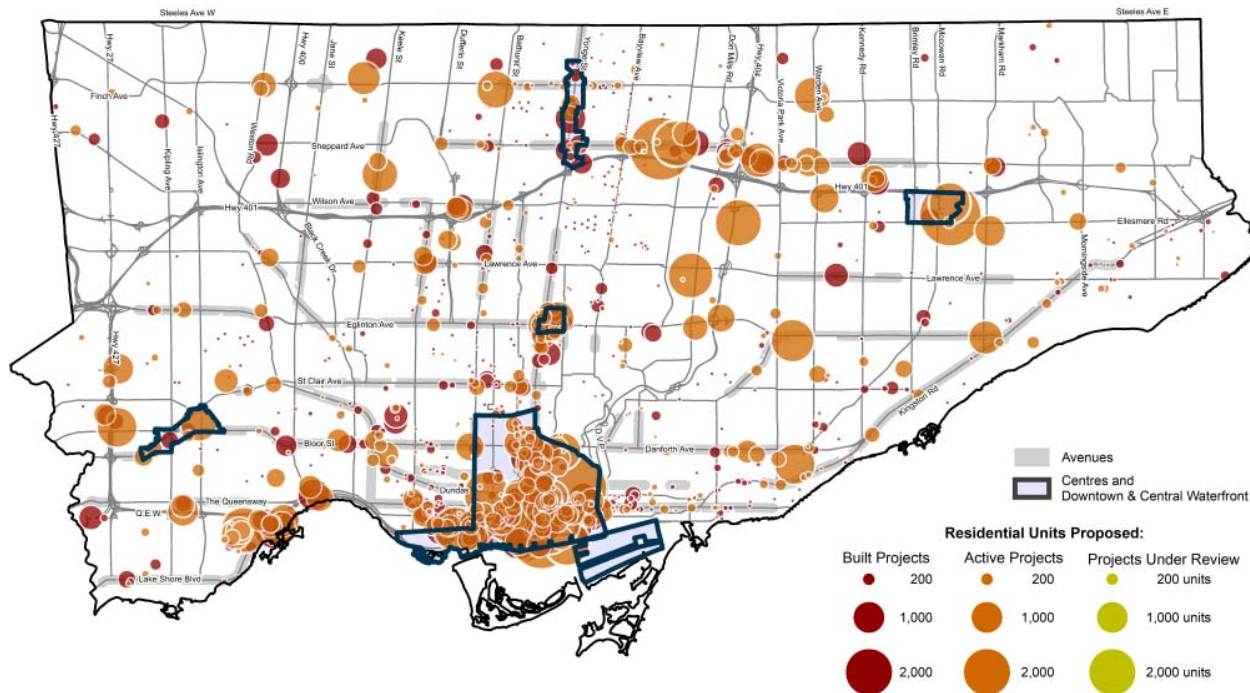
Built Residential Development

Projects 568  86,441 residential units
7.2 million m² of residential GFA



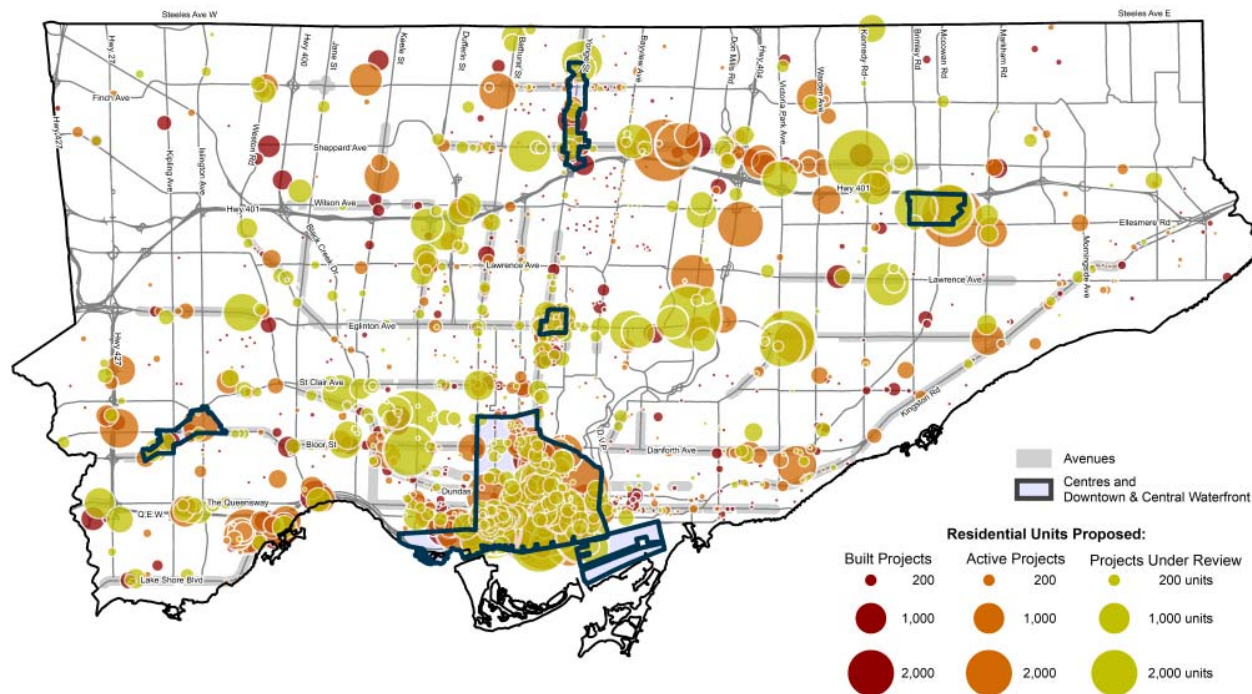
Active Residential Development

Projects 448  143,858 residential units
11.5 million m² of residential GFA



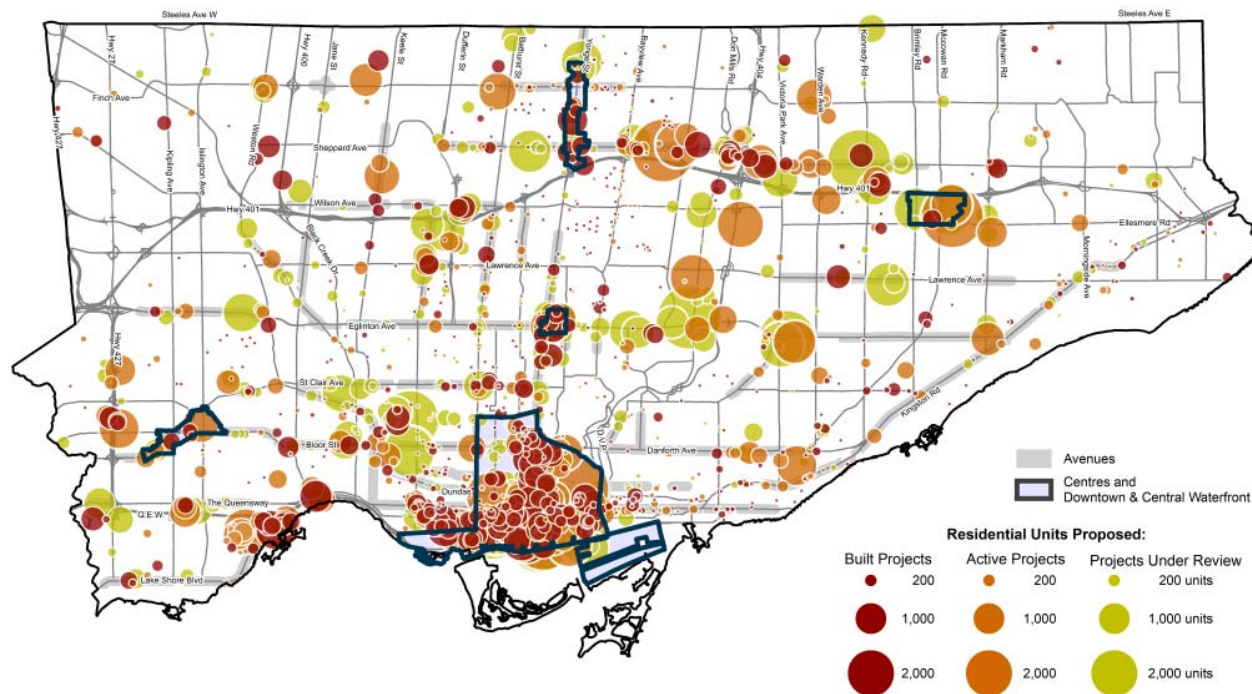
Residential Development Under Review

Projects 455  146,181 residential units
11.7 million m² of residential GFA



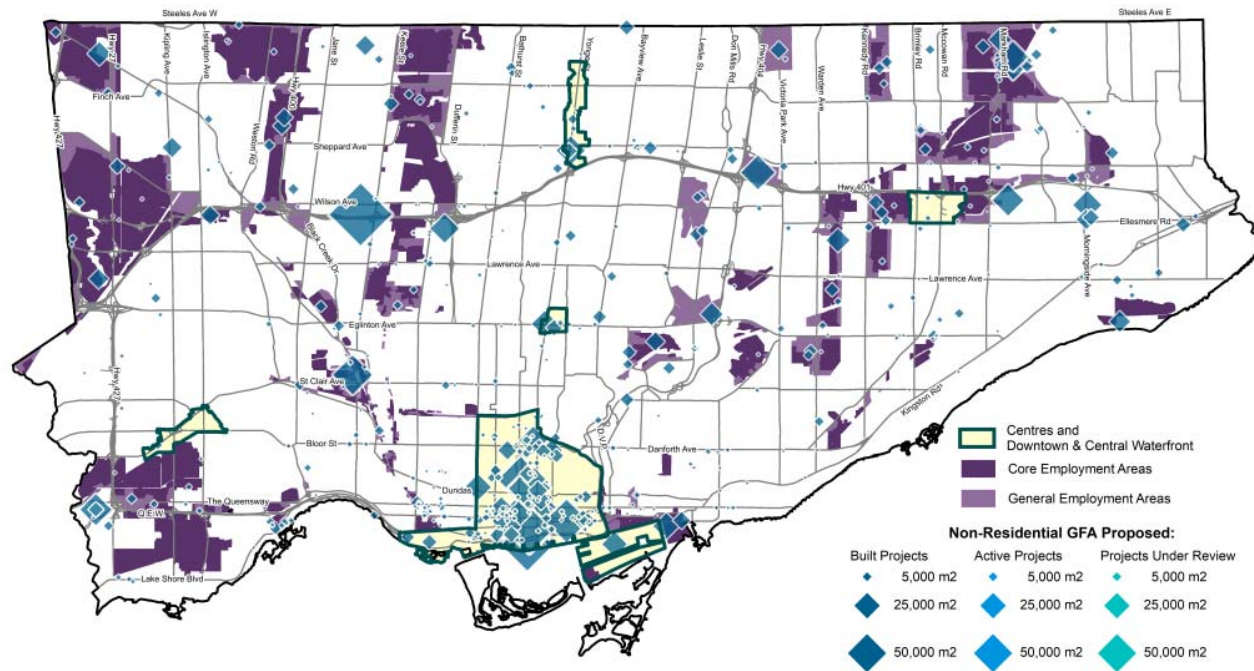
Proposed Residential Development

Projects 1,471  376,480 residential units
30.5 million m² of residential GFA



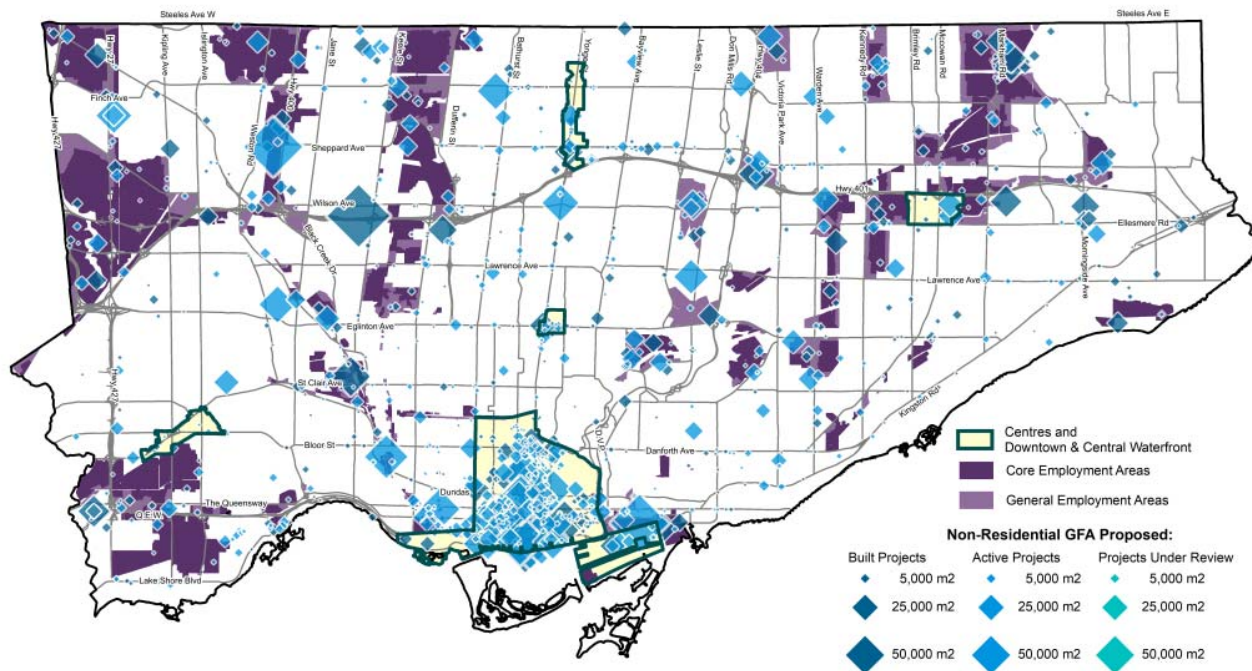
Built Non-Residential Development

Projects 481  2.6 million m² of non-residential GFA
(566,522 m² in Employment Areas)



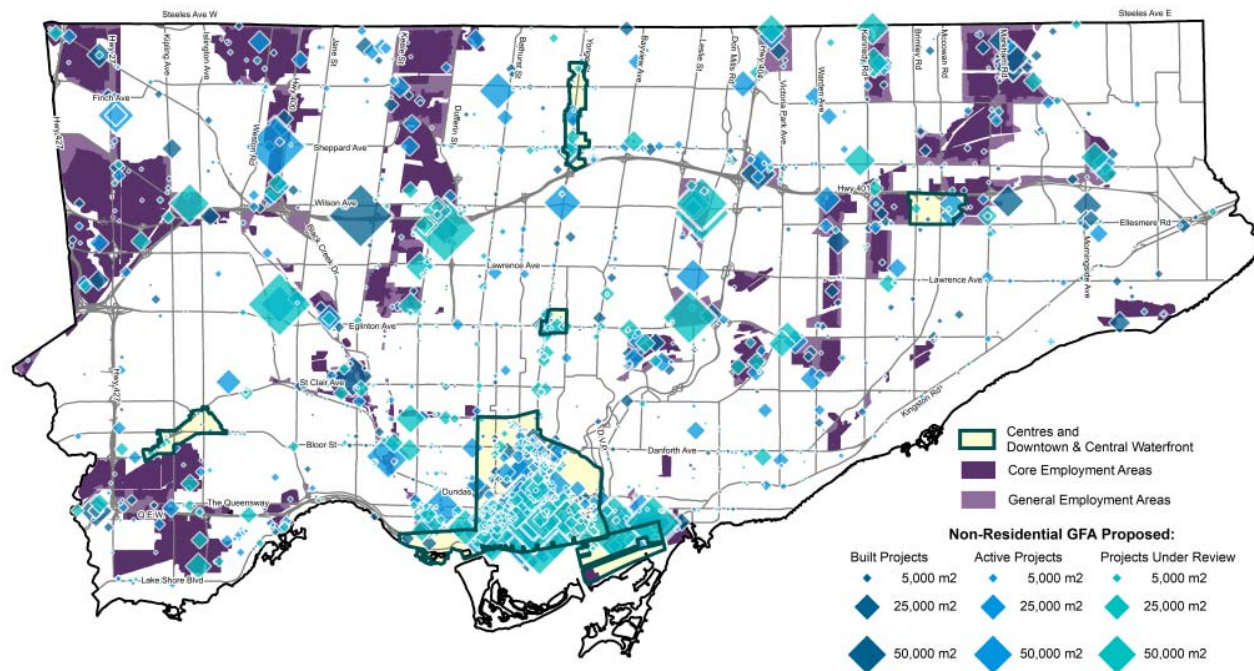
Active Non-Residential Development

Projects 512  3.6 million m² of non-residential GFA
(791,528 m² in Employment Areas)



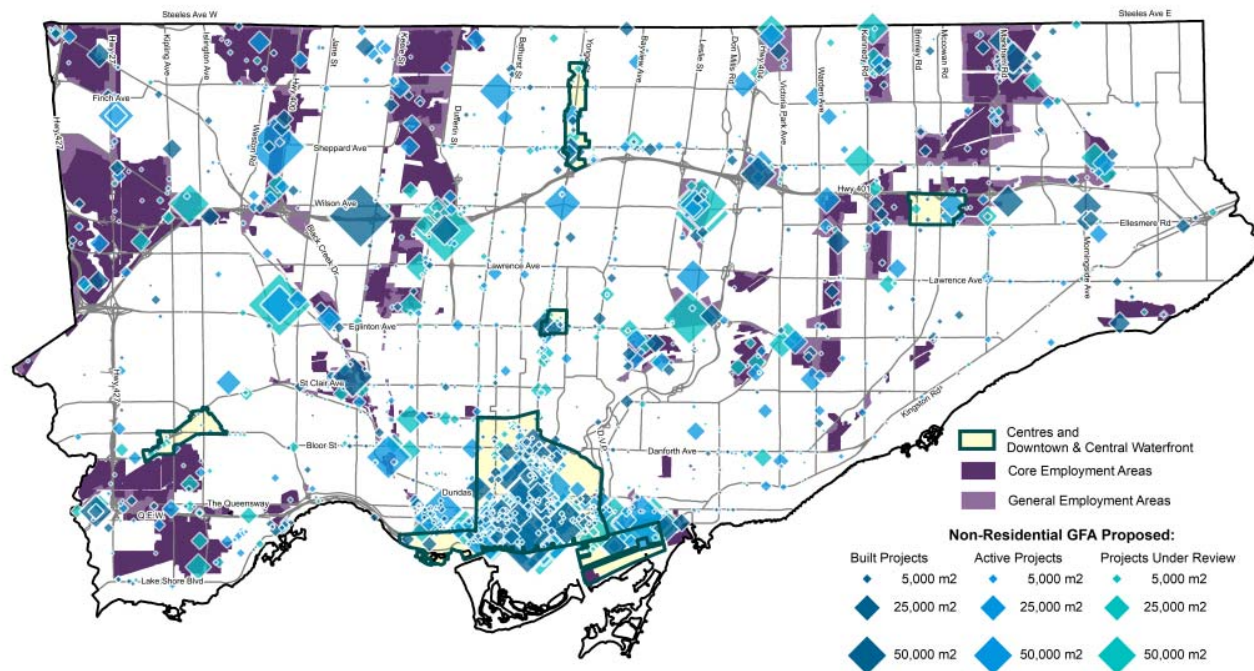
Non-Residential Development Under Review

Projects 439  4.1 million m² of non-residential GFA
(1.8 million m² in Employment Areas)



Proposed Non-Residential Development

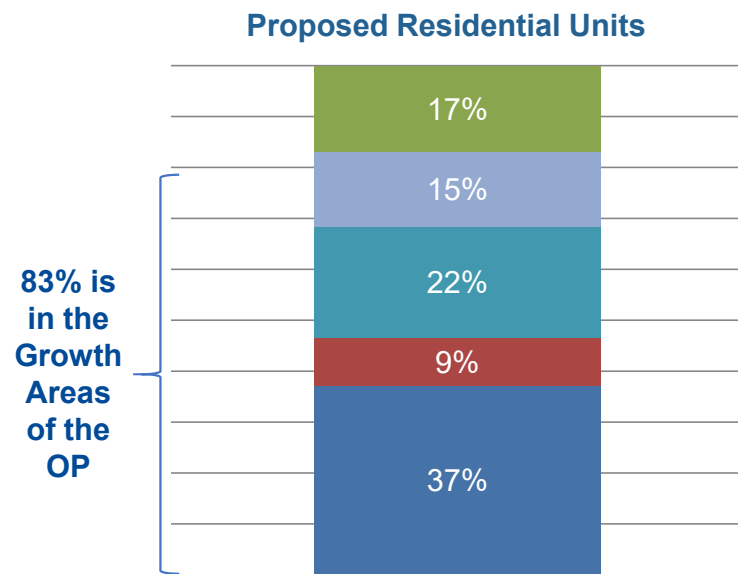
Projects 1,432  10.3 million m² of non-residential GFA
(3.2 million m² in Employment Areas)



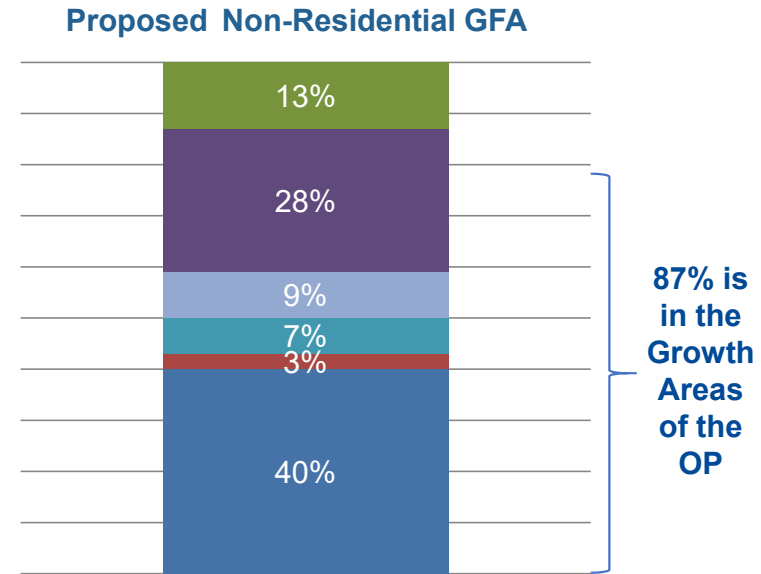


Official Plan Geography

Toronto Development Activity in Growth Areas



- All Other Areas
- Other Mixed Use Areas
- Avenues
- Centres
- Downtown & Central Waterfront

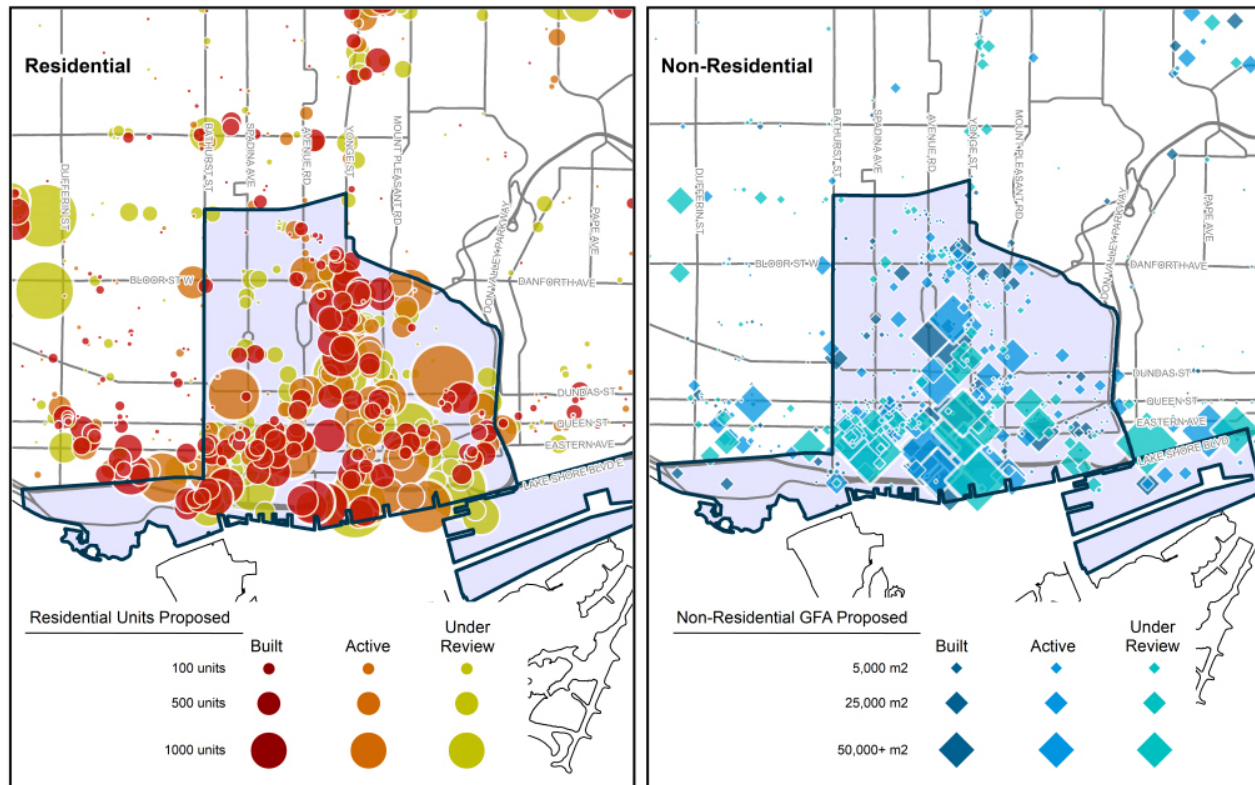


- All Other Areas (excluding Employment Areas)
- Employment Areas (outside other Growth Areas)
- Other Mixed Use Areas
- Avenues
- Centres
- Downtown & Central Waterfront

Downtown & Central Waterfront Development Activity

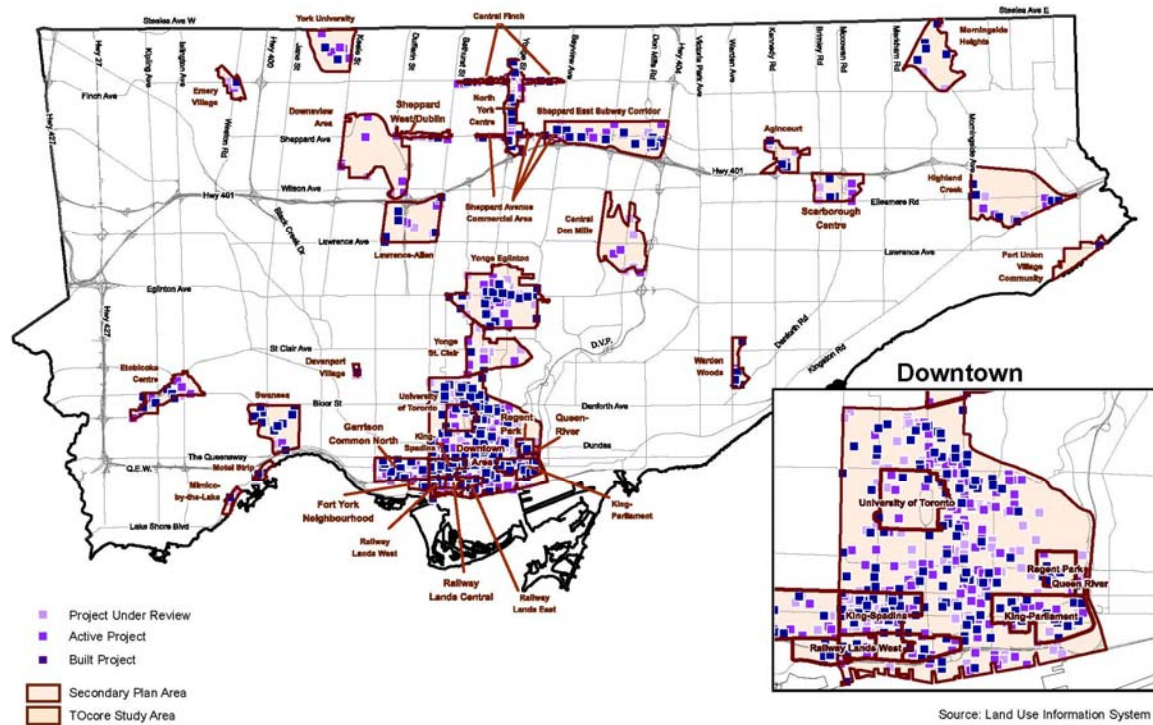
140,116 units = 37% of units

4.1 Million m² = 40% NR GFA

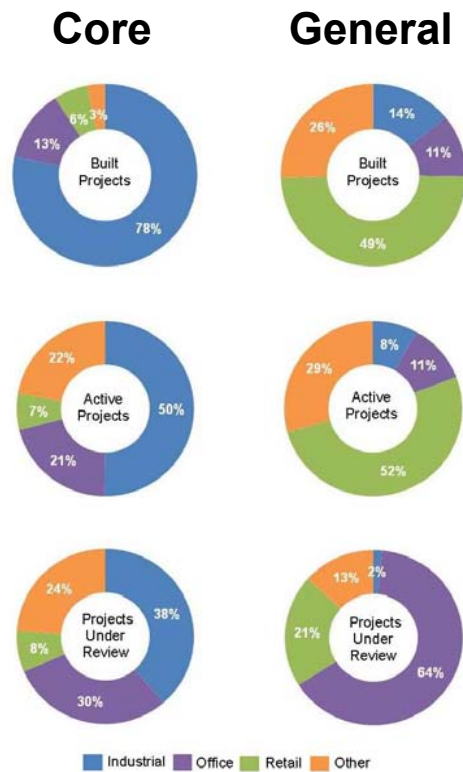


Secondary Plan Area Development

Projects 869  242,140 residential units
5.26 million m² of non-residential GFA



Proposed Non-Residential GFA in Employment Areas



Jobs in Employment Areas, 2013-2017



How Does the City Grow

Update 2018

www.toronto.ca/howdoesthecitygrow

