

How Does the City Grow? - Update 2019

Date: June 6, 2019

To: Planning and Housing Committee

From: Chief Planner and Executive Director, City Planning

Wards: All

SUMMARY

This report and attached bulletin are another in a series of research documents produced by City Planning that summarizes development activity in the city. Information from the Division's Land Use Information System II and other sources have been analyzed to provide an overview of all development projects with any development activity between January 1, 2014 and December 31, 2018. 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. The bulletin illustrates how the city has grown over these five years and how it may continue to develop over time.

In total, 397,000 residential units and 11 million square meters of non-residential gross floor area (GFA) were proposed by projects with development activity between January 1, 2014 and December 31, 2018. Of this, 140,000 residential units were approved but not yet built, and an additional 167,000 were still under review. Combined, if all these units were approved, built and occupied, they would accommodate approximately 543,000 residents and bring Toronto's total population to 3.50 million.

RECOMMENDATIONS

The Chief Planner and Executive Director, City Planning recommends that:

1. The Planning and Housing Committee receive this report for information.

FINANCIAL IMPACT

There are no financial implications resulting from this report.

COMMENTS

Implementing effective land use planning policies requires monitoring the trends in development proposals and approvals. The development activity over the past five years demonstrates continued strong demand and supply of housing in the city.

Over the last several years, while fewer projects have been submitted to City Planning for review, in general the proposals submitted represent larger, more complex projects containing more residential units and non-residential space in total. These larger projects on average take longer to progress through the planning and development cycle. While not all proposals are approved and not all approved projects are built, those projects which are approved and built result in tens of thousands of new housing units and hundreds of thousands of square metres of space for employment.

Citywide Trends

- Over 397,000 residential units and over 11 million square metres of non-residential gross floor area (GFA) were proposed, representing all projects with development activity between January 1, 2014 and December 31, 2018.
- There are 20,847 more residential units and 859,609 million square metres more non-residential GFA in this pipeline compared to the 2017 Q4 pipeline that was reported on in the last How Does the City Grow? bulletin.
- Almost 90,000 new residential units were constructed between 2014 and 2018.
- Over the past five years, almost 16,000 more residential units received their initial Planning approval than were built. This will help to ensure a steady supply of approved housing will be available for construction and occupancy in the future.
- More than 140,000 residential units and more than 4.4 million square metres of non-residential GFA are active, meaning they have received at least one Planning approval but have not yet been built.
- Over 167,000 residential units and over 4.1 million square metres of non-residential GFA are under review.
- Toronto will continue to grow as these proposed developments receive planning approval and building permits.

Potential Population

- As of 2018, the City's population was over 2.9 million or 91% of the 2041 population forecasted in Schedule 3 of A Place to Grow, the 2019 Provincial Growth Plan for the Greater Golden Horseshoe.
- There are approximately 140,000 units which are approved but not yet built in the Development Pipeline. If completed and occupied, the potential population in these units could be about 249,000 people and would bring the City's population to 3.15 million or 93% of the forecasted population at 2041.
- If the 167,000 units which were still under review at the end of 2018 were also approved and built, this would add another 293,000 people to the City's population.
- If fully built out and occupied, the Development Pipeline could produce a potential population of 3.50 million or 103% of the 2041 population forecast contained in the Provincial Growth Plan.

Growth Management Areas

- Eighty-four percent of new residential development is proposed in areas targeted for growth by the City's Official Plan.
- Ninety percent of new non-residential development is proposed in areas targeted for growth by the City's Official Plan including *Employment Areas*.
- The *Downtown and Central Waterfront* area is the main location for proposed residential and office development, with 37% of the residential units and 39% of the non-residential GFA proposed in the city.
- Almost 42,000 residential units and over 360,000 square metres of non-residential GFA are proposed in the *Centres*.
- Over 85,000 residential units are proposed along the *Avenues* identified in the Official Plan.
- Areas of the city covered by a Secondary Plan contain proposals for 64% of the residential units and 52% of the non-residential GFA proposed city-wide.
- The Downtown Plan Secondary Plan area contains over 142,500 proposed residential units and 4.2 million square metres of proposed non-residential GFA.
- Thirty-one percent of the city's proposed non-residential floor space is in the *Employment Areas* outside of the *Downtown and Central Waterfront* and the *Avenues*.
- Over 871,000 square metres of industrial GFA is proposed in the *Employment Areas*, accounting for 83% of proposed industrial GFA in the city.

Conclusion

The city continues to be an exceptionally attractive location for development in the Greater Toronto Area (GTA). There are more residential units and more non-residential GFA proposed in the current Development Pipeline than in any other Pipeline since 2016, when City Planning changed how this dataset is defined. Given the scale of this proposed development, comprehensive planning frameworks that link infrastructure to growth needs are becoming increasingly important.

The City of Toronto's population growth is slightly ahead of the forecasts supporting the A Place to Grow: Growth Plan for the Greater Golden Horseshoe. Toronto is also on track to achieve the employment and housing forecasts supporting the 2019 Growth Plan well before 2041. As the City's *Urban Growth Centres* develop, they are progressing towards or exceeding the Province's density targets set out in the 2019 Growth Plan.

CONTACT

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SIGNATURE

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ATTACHMENTS

Attachment 1: How Does the City Grow? – Update 2019