PH7.12 Attachment 1, Part 1

TORONTO

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, 2014 and December 31, 2018. This Development Pipeline data is supplemented by other data sources such as CMHC, Statistics Canada and the Toronto Employment Survey.

profile TORONTO

June 2019

How Does the City Grow?

Highlights

- 397,327 residential units and 11.1 million m² of non-residential gross floor area (GFA) are proposed in projects with development activity between 2014 and 2018.
- There are 20,847 more residential units and 859,609 million m² more non-residential GFA in this pipeline compared to that reported on in the previous How Does the City Grow? bulletin.
- 89,577 residential units were constructed between 2014 and 2018.
- 307,750 units and 8.6 million m² of non-residential floor space are proposed but not yet built.
- 84% of new residential development is proposed in areas targeted for growth by the City's Official Plan.
- 90% of new non-residential development is proposed in growth areas including *Employment Areas.*
- The most grow is proposed in the *Downtown and Central Waterfront*, with 37% of the residential units and 39% of the non-residential GFA.
- 31% of the city's proposed non-residential floor space is in *Employment Areas*.
- As the City's *Urban Growth Centres* develop, they are progressing towards or are exceeding the Province's density targets.

Introduction

Toronto is Canada's most populous city and the focal point of development and growth for 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 has subsequently undergone a number of thematic amendments to bring it into conformity with the Growth Plan and the Provincial Policy Statement. The Official Plan is the guide for development in the city over the coming decades. While gradual intensification occurs across the city, its central geographic theme is to direct growth to appropriate areas, given their access to transit and other community services and facilities 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.

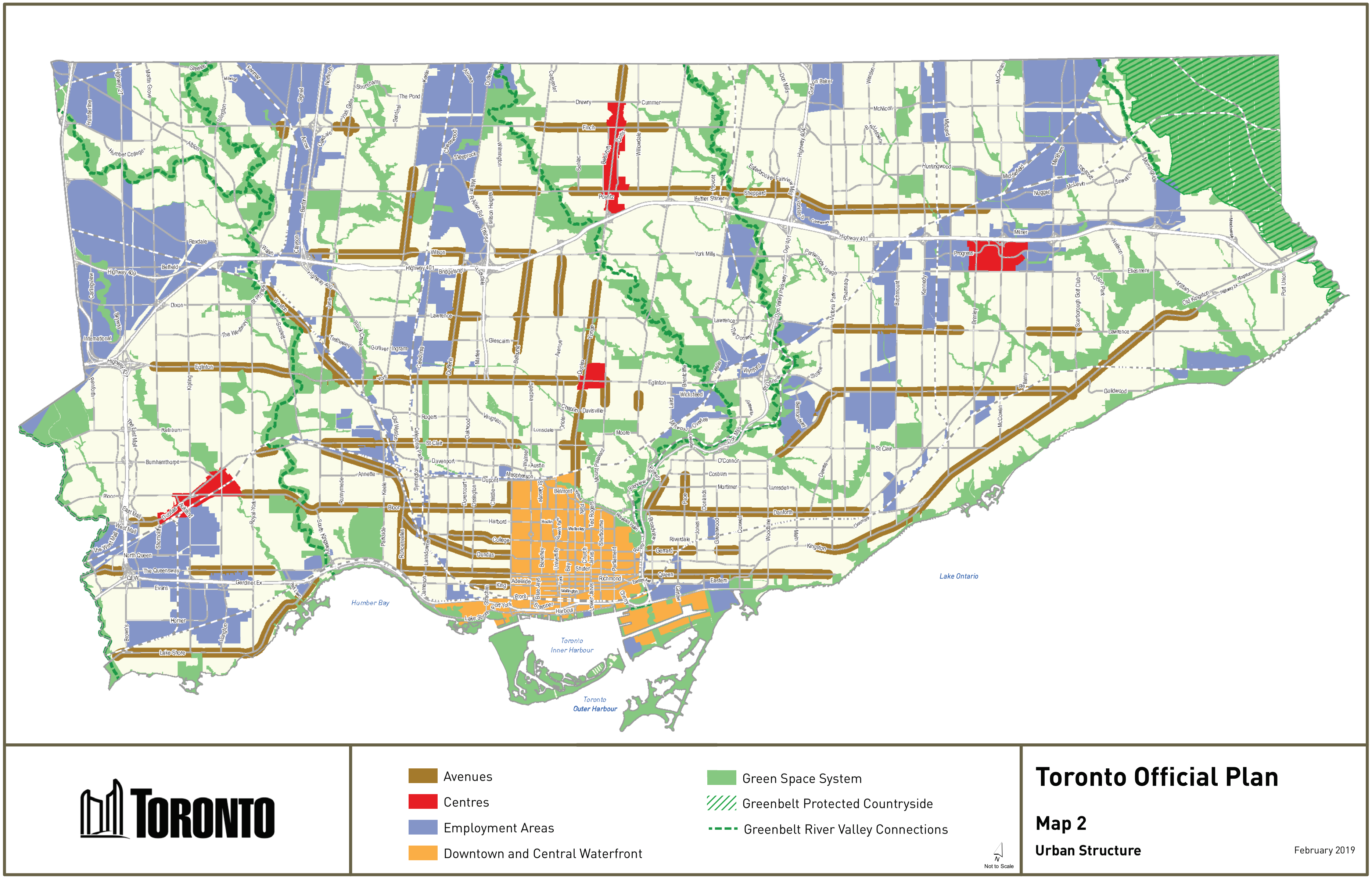
Toronto's Development Pipeline

What is the Development Pipeline?

The City of Toronto's Development Pipeline consists of all development projects in the City of Toronto with any development activity 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 between January 1, 2014 and December 31, 2018. 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. The tracking of development projects has been improved. For example, complex

Map 1: Official Plan Urban Structure Map



Project Stages and Statuses	
Status	**Stage**
Under Review	Planning Application Submitted
Active	Delegated/Council Approval
Active	Issuance of a Permit
Active	Work Stated
Built	Ready for Occupancy
Built	Work Completed

Delegated approval refers to Site Plan or Plan of Condominium approvals that have been granted by the Chief Planner.

projects have been split into phases so that the different parts of a project can be tracked at different stages of development once each phase has been submitted. This has enabled each phase to be reflected in the Pipeline until that phase is either built or becomes inactive.

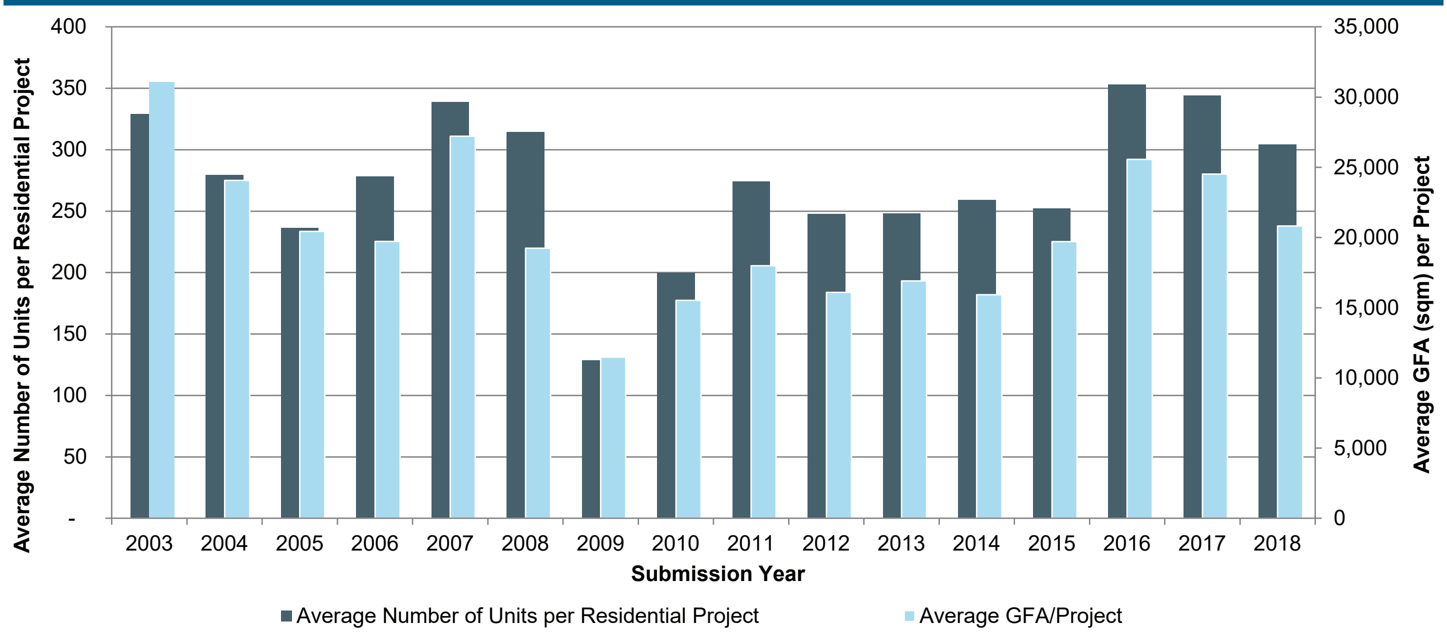
Projects are categorized into three general statuses, based on the stage of development they reached between January 1, 2014 and December 31, 2018.

- 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, including:
  - projects with approved Official Plan Amendments and/or Zoning By-law Amendments, which may or may not have applications for Site Plan Control submitted or approved;
  - projects with some Planning approvals and for which Building Permits have been applied for or have been issued; and
  - projects which are under construction but are not yet built.
- Projects Under Review are those which have not yet been approved or refused, and those which are under appeal.

The Development Pipeline Prior to 2016

Prior to 2016, previous issues of this bulletin reported on all applications received within a five year period rather than all applications with activity within a five year period. Recently, there have been fewer projects submitted for approval. However, on average, these projects are larger and more complex and subsequently require a longer review and construction process (see Figure 1). Consequently, in 2016, the Development Pipeline was enhanced to provide a more fulsome representation of near-term housing supply in the city.

Figure 1: Proposed Units and GFA per Project by Submission Year



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

Development projects submitted between January 1, 2003 and December 31, 2018 and with activity between January 1, 2014 and December 31, 2018.

Proposed GFA includes residential and non-residential GFA.

The Development Pipeline January 1, 2014 – December 31, 2018

	Built	Active	Under Review	Total in Pipeline	% of Total
City of Toronto	**810**	**717**	**665**	**2,192**	**100.0**
Growth Areas					
Downtown and Central Waterfront	152	154	147	**453**	20.7
Centres	33	27	39	**99**	4.5
Avenues	154	167	188	**509**	23.2
Other Mixed Use Areas	69	81	56	**206**	9.4
All Other Areas	402	288	235	**925**	42.2

Table 1: Proposed Projects in the City of Toronto by Status

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

Development projects with activity between January 1, 2014 and December 31, 2018. 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 continues to experience strong growth and development activity (see Maps 2 and 3 on pages 6 and 7). The 2018 Development Pipeline is comprised of 2,192 development projects (see Table 1). Cumulatively, these projects propose a record 397,327 residential units and over 11 million square metres of non-residential gross floor area (GFA) (see Tables 2 and 3).

The 2018 Pipeline contained 20,847 more residential units and 859,609 m^2 more non-residential GFA than the 2017 Pipeline which reported on projects active between January 1, 2013 and December 31, 2017. Yet despite this increase, there were actually 215 fewer projects in the 2018 Pipeline due to a continuing trend towards larger and more complex applications over the past five years by comparison to previous five-year periods since the Official Plan was adopted by Council in 2002.

Over the last five years, Council has approved more residential units than were built (see Table 4 on page 5). City Council approved an average of 21,182 residential units per year between 2014 and 2018, while 18,000 units on average were built annually. This surplus helps to ensure a steady supply of approved housing will be available for construction and eventual occupancy.

Despite the fact that not all proposed projects are approved, and not all approved projects are built, the Pipeline provides a good indication of near-term housing supply.

Table 2: Proposed Residential Units in City of Toronto by Status

	Built	Active	Under Review	Total in Pipeline	% of Total
City of Toronto	**89,577**	**140,441**	**167,309**	**397,327**	**100.0**
Growth Areas					
Downtown and Central Waterfront	39,620	50,699	55,227	**145,546**	36.6
Centres	9,260	14,573	18,046	**41,879**	10.5
Avenues	19,846	27,301	38,312	**85,459**	21.5
Other Mixed Use Areas	9,294	28,142	24,857	**62,293**	15.7
All Other Areas	11,557	19,726	30,867	**62,150**	15.6

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

Proposed units in development projects with activity between January 1, 2014 and December 31, 2018. 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.

Built Projects

Many projects with development activity between 2014 and 2018 have become occupied and/or have completed construction during this period. In the current Pipeline, 810 proposed projects 37% of the total) have completed construction or received a partial occupancy permit. These projects represent an addition of 89,577 newly constructed residential units to the city's housing supply and nearly 2.6 million m^2 of non-residential GFA (see Figures 2 and 3 on page 8).

Active Projects

In the current Pipeline, 33% of projects are active with at least one Planning approval, accounting for 140,441 residential units and

Table 3: Proposed Non-Residential GFA in City of Toronto by Status

	Built	Active	Under Review	Total in Pipeline	% of Total
City of Toronto	**2,559,819**	**4,442,511**	**4,153,796**	**11,156,126**	**100.0**
Growth Areas					
Downtown and Central Waterfront	1,121,443	1,564,413	1,688,604	**4,374,460**	39.2
Centres	98,114	98,955	163,101	**360,170**	3.2
Avenues	126,606	211,648	444,265	**782,519**	7.0
Other Mixed Use Areas	348,163	315,274	364,937	**1,028,374**	9.2
All Other Areas	865,493	2,252,221	1,492,888	**4,610,603**	41.3

Source: City of Toronto, City Planning: Land Use Information System II
Proposed non-residential GFA in development projects with activity between January 1, 2014 and December 31, 2018. 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.

4.4 million m^2 of non-residential GFA. Residential projects that are approved but not yet built represent approximately nine to 13 years of potential housing supply, given the average pace of completions reported by Canada Mortgage Housing Corporation (CMHC) (see Table 5 on page 9). At any given time, there are active residential projects at different stages of development from an initial approval to the beginning of construction. Table 6 (on page 9) shows all proposed residential units in active projects broken down by the stage of activity.

Projects Under Review

In the current Pipeline, there are 167,309 residential units and an additional 4.2 million m^2 of non-residential GFA in projects currently under review. Figure 4 displays these units by status, showing that 42% of all proposed residential units are currently under review.

Table 4: Residential Units Approved and Built by Year

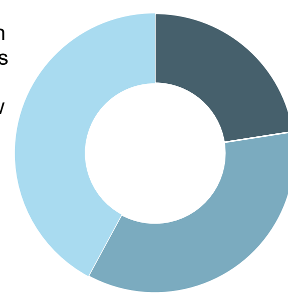
Year	Units Approved	Units Built
2014	31,844	25,855
2015	17,580	17,279
2016	13,731	18,311
2017	23,286	9,727
2018	19,467	18,830
Total	**105,908**	**90,002**
Average	21,182	18,000

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

Units in development projects with activity between January 1, 2014 and December 31, 2018. Units approved are units in projects that received their first planning approval in the year listed. Units built are units in projects that became ready for occupancy and/or were completed in the year listed.

Note: the number of units built in Table 2 may differ from the number of units in built projects listed in Table 4, as some projects became ready for occupancy before 2014 but had other development activity (such as an application for a Draft Plan of Condominium) during the pipeline window of January 1, 2014 to December 31, 2018. These figures are different than those in Tables 5 and 7 because units in the planning process are recognized as completed when the building is ready for occupancy or substantially complete, whereas CMHC recognizes units as built once the building is fully complete.

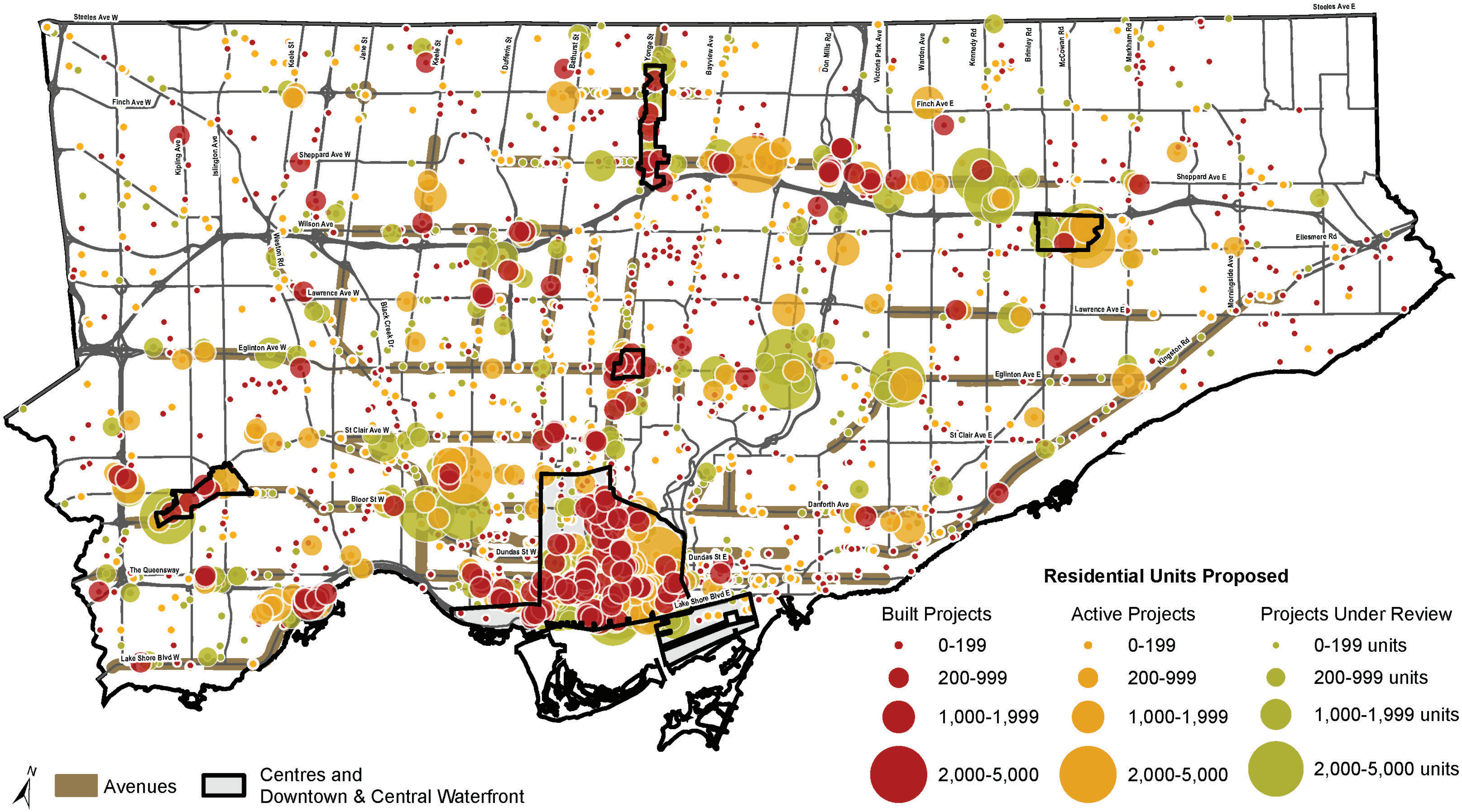
Figure 4: Residential Units by Status



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

Proposed units in development projects with activity between January 1, 2014 and December 31, 2018. 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. Percentages may not total 100 due to rounding.

Map 2: City of Toronto Proposed Residential Development



Source: Land Use Information System II
Development projects with activity between January 1, 2014 and December 31, 2018. Built projects are those which became ready for occupancy and/or were completed.
Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or which are under construction.
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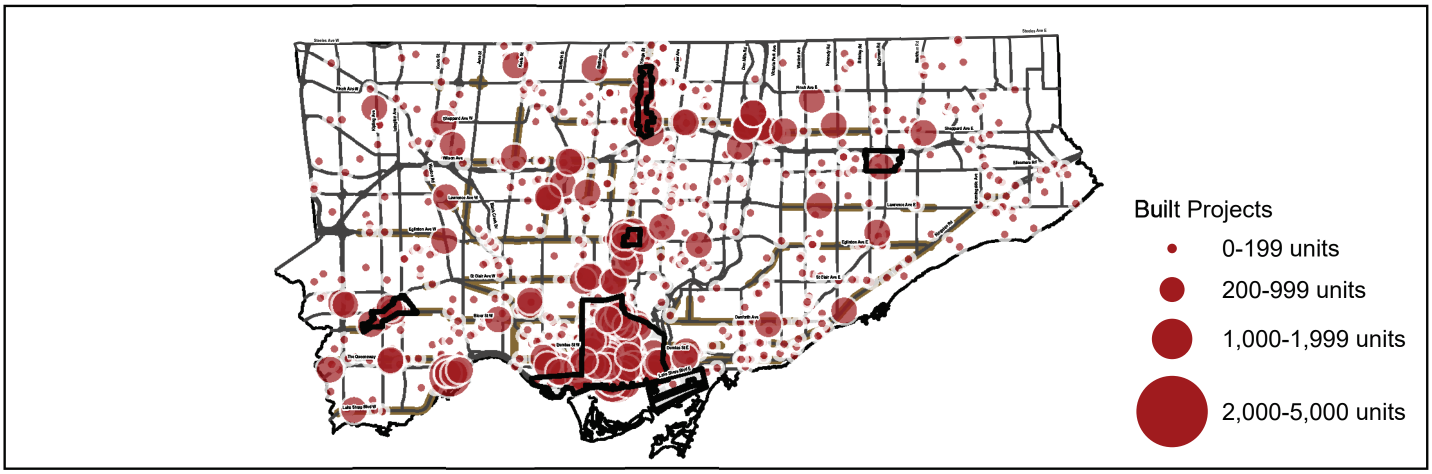
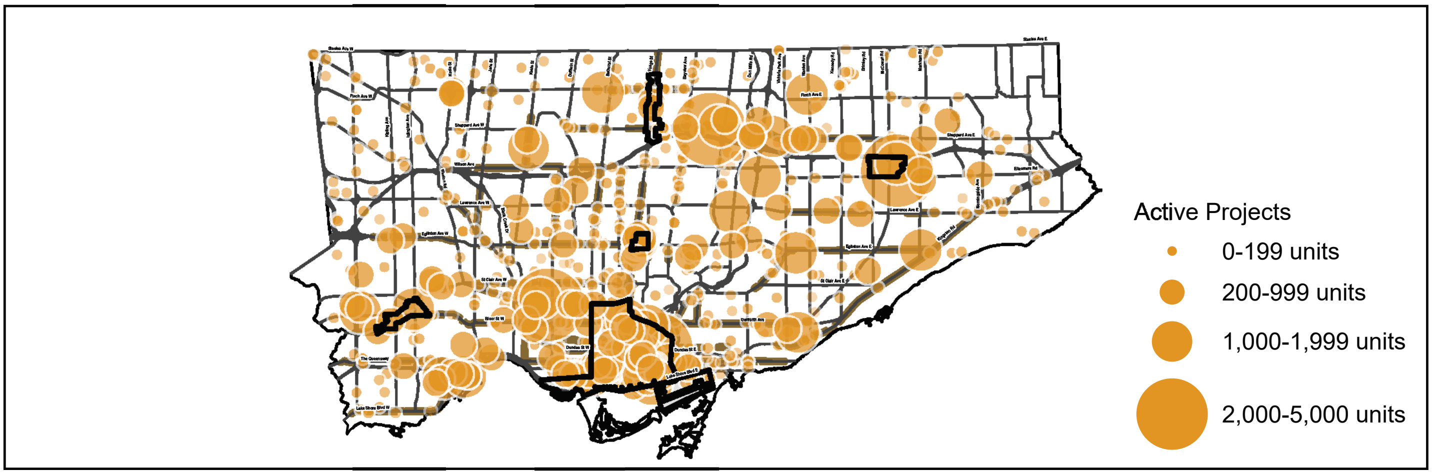
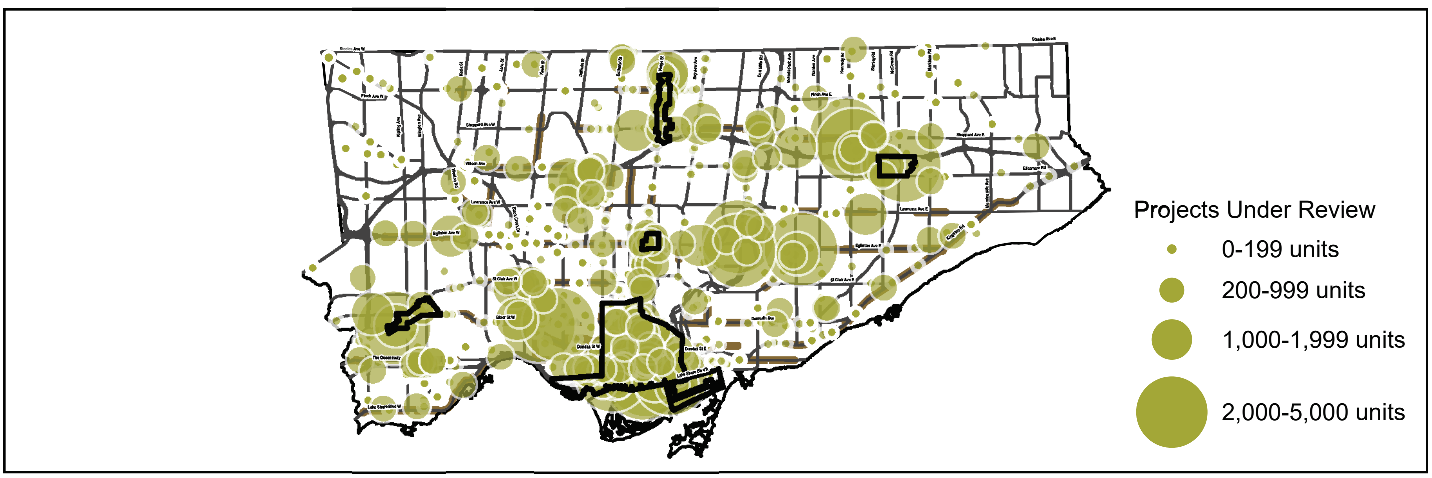
Prepared by: Toronto City Planning Division, Research and Information - June 2019

Published: June 2019.

Map 3: City of Toronto Proposed Residential Development by Status







Source: Land Use Information System II
Development projects with activity between January 1, 2014 and December 31, 2018. Built projects are those which became ready for occupancy and/or were completed. Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal.

Prepared by: Toronto City Planning Division, Research and Information - June 2019

Published: June 2019.

Avenues
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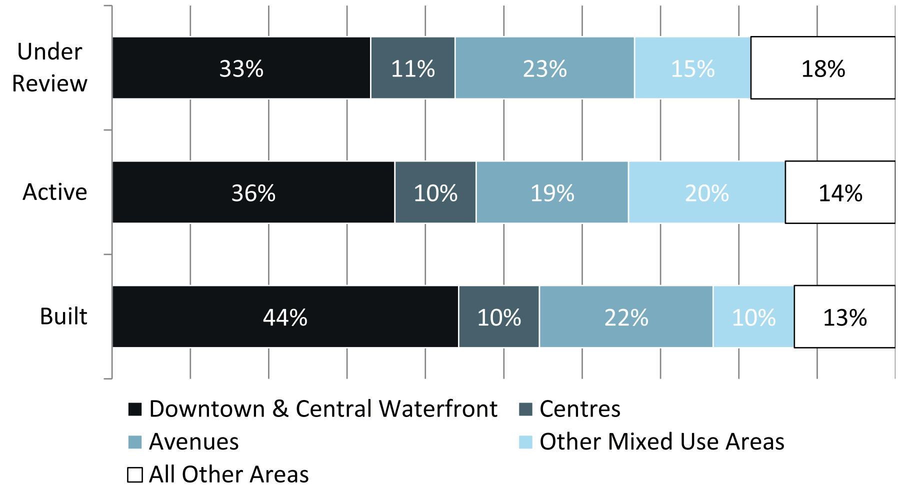
Centres and Downtown & Central Waterfront

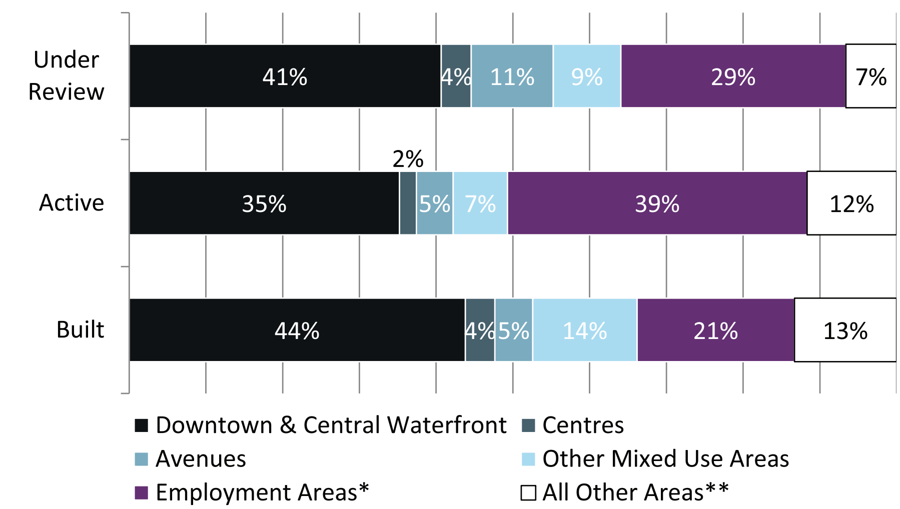
Figure 2: Proposed Residential Units in Growth Areas by Status



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

Proposed units in development projects with activity between January 1, 2014 and December 31, 2018. 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. Percentages may not total 100 due to rounding.

Figure 3: Proposed Non-Residential Gross Floor Area in Growth Areas by Status



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

Proposed units in development projects with activity between January 1, 2014 and December 31, 2018. 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. Percentages may not total 100 due to rounding.

*Employment Areas outside of Downtown, Centres, Avenues, and Other Mixed Use Areas only.

**All Other Areas in this figure excludes Employment Areas.

Across the city, more than three-quarters of the residential units and non-residential GFA proposed in the Development Pipeline are not yet built. There are 307,750 residential units and 8.6 million m^2 of non-residential GFA that are either under review or active, indicating a continuation of strong construction activity in Toronto in the coming years. If all of these units were realized over time, they would increase the total number of dwellings in the City by over one quarter.

Dwelling Unit Completions and Absorptions

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 33% of the housing completions in the GTA since 1988 (see Table 5). Toronto's housing construction has recovered from the 2008 global recession (see Figure 7 in the Appendix on page 30). The number of units completed in 2015 was about double the average number of units completed annually over the past 10 years. After this record-setting year, the number of completions in Toronto returned to more typical levels. In 2018, 16,086 units were completed, the third highest number of completions in Toronto since 1988.

High-density condominium apartments continue to dominate the new construction landscape in Toronto. CMHC recorded 86,584 residential units completed in Toronto between 2014 and 2018 inclusive and 84% of these units were condominium apartments.[3]

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 7 (on page

10) compares the number of completions and absorptions in Toronto over the last 15 years. The average percentage of unabsorbed units has decreased to 0.4% for the 2014 to 2018 time period from 7.5% between 2009 and 2013.

The Market Absorption Survey demonstrates that the bulk of the unabsorbed units are in the rental market. Rental completions represented 7.2% of total completions, but only 6.0% of total absorptions. The higher rate of unabsorbed rental units is not the result of an oversupply of this type of unit (see Table 15 in the Appendix on page 31). The methodology of the Market Absorption Survey requires that buildings must be 100% completed and that people are beginning to move in before the units become counted as "absorbed". The recording of absorptions will tend to lag completions in the latest periods of the Survey. Therefore, the data on absorptions and completions needs to be cautiously interpreted.

Table 5: Dwelling Completions, Greater Toronto Area

Year	Toronto	GTA	Toronto % of GTA
1989-1993	45,942	150,782	30.5%
1994-1998	22,925	107,469	21.3%
1999-2003	49,964	203,610	24.5%
2004-2008	58,230	201,001	29.0%
2009-2013	70,427	167,711	42.0%
2014-2018	86,584	190,581	45.4%
Total	**334,072**	**1,021,154**	**32.7%**
Average 1989-2018	11,136	34,038	
Average 2009-2018	15,701	35,829	

Source: Canada Mortgage and Housing Corporation, *Monthly Housing Now - Greater Toronto Area Reports*

Note: Completions are for whole calendar years.

Development in Toronto's Growth Areas

Toronto's Official Plan sets out the urban structure of the city to guide its development over the next few decades. The Plan develops a strategy for directing growth within this structure and sets out the policies for the management of change, through the integration of land use and transportation. Some areas of the city identified for growth also need more detailed guidance in the form of Secondary Plans, area studies, policies to guide local planning and innovative implementation solutions. The Plan is intended to contribute to a future in which the private sector marshals its resources to help implement public policy objectives, one in which housing choices are available for all people in their communities at all stages of their lives. The 2018 Development Pipeline shows that 84% of residential development and 59% of non-residential development is proposed in areas targeted for growth by the City's Official Plan, including the *Downtown and Central Waterfront*, the *Centres*, the *Avenues*, and other *Mixed Use Areas.*

Table 6: Proposed Residential Units in Active Projects by Stage

Stage as of December 31, 2018		Proposed Residential Units in Active Projects		Active Residential Projects	
Stage	**Stage Description**	**Number**	**Percent**	**Number**	**Percent**
2	Delegated/Council Approval*	61,529	44%	180	41%
3	Permit Application	13,232	9%	53	12%
4	Issuance of a Permit	6,374	5%	28	6%
5	Work Started	59,306	42%	183	41%
Total		**140,441**	**100%**	**444**	**100%**

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

Active development projects with activity between January 1, 2014 and December 31, 2018. 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.

*Delegated approval refers to Site Plan or Plan of Condominium approvals that have been granted by the Chief Planner.

Downtown and Central Waterfront

The *Downtown and Central Waterfront* area is the most prominent location for development activity across the city and contains the largest percentage of proposed projects. In the current Development Pipeline, the projects submitted in this area proposed 145,546 new units and 4.4 million m^2 of non-residential GFA. This comprises 37% of the residential units and 39% of the non-residential GFA proposed in the entire city (see Tables 2 and 3).

Table 7: Dwelling Unit Completions and Absorptions, City of Toronto

Year	Completions	Absorptions	Net Completions	"Unabsorbed" Percentage
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%
2016	16,027	16,629	-602	-3.6%
2017	14,171	14,675	-504	-3.4%
2018	16,086	15,855	231	1.5%
Total	**215,241**	**209,454**	**5,787**	**2.8%**
2004-2018 Average	**14,349**	**13,964**	**386**	**2.8%**
2004-2008 Average	11,646	11,540	106	0.9%
2009-2013 Average	14,085	13,105	981	7.5%
2014-2018 Average	17,317	17,246	71	0.4%

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

Note 1: The data in Table 7 reflects the total number of units for each 12-month period. Due to cyclical variations in the construction and sales industry that are unequally distributed throughout the year, 2019 year-to-date data has been excluded.

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

Map 4 (on page 11) shows the distribution of residential and non-residential projects throughout *Downtown*. The Yonge Street corridor and the *Central Waterfront* have attracted increasingly large residential development proposals. The proposed projects in *Downtown* with 1,000 residential units or more are listed in Table 8 (on page 12). One example is Regent Park, a public-private partnership that is in the midst of revitalizing existing social housing stock. On completion, Regent Park will include new retail, community spaces, services, and infrastructure within a more mixed-income and mixed-use neighbourhood.

A notable amount of non-residential activity is occurring in *Downtown*. In the current Pipeline, there are nine large projects each proposing over 100,000 m^2 of non-residential GFA in the *Downtown and Central Waterfront* area; see Table 9 (on page 13). Many of the largest projects with non-residential components are mixed-use projects that incorporate housing. While most major projects include primarily office space, there are notable examples with other types of non-residential uses *Downtown* including:

- the ongoing Union Station Revitalization at 61 Front Street West;
- the approved new courthouse at 11 Centre Avenue; and
- the proposed Ryerson University student residence at 202 Jarvis Street.

These projects are in addition to 357 other development projects in *Downtown* proposing less than 50,000 m^2 of non-residential floor space.

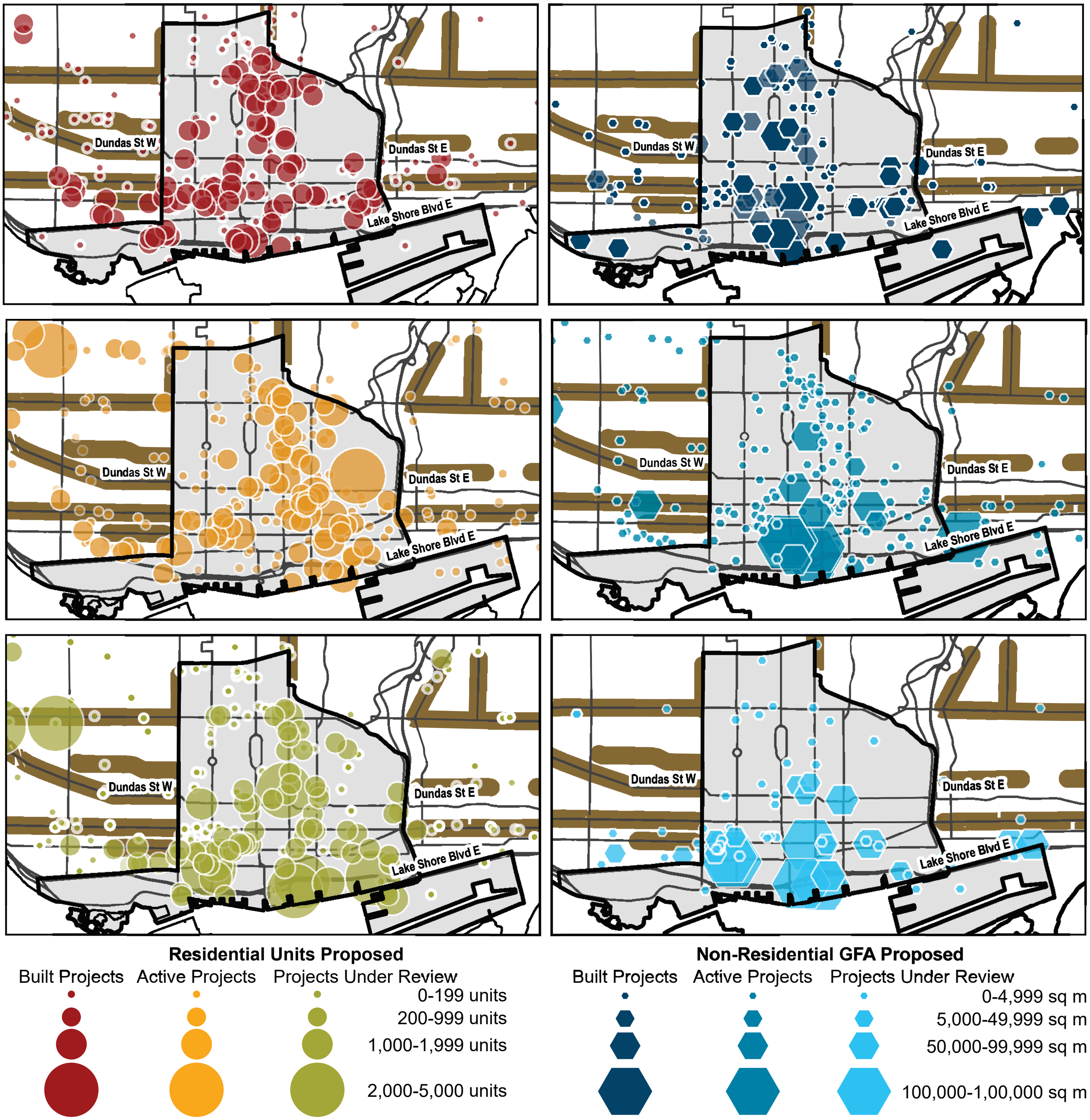
Map 4 also shows a strong north-south trend of recently built non-residential development activity between University Avenue and Yonge Street, with the largest built projects located in this corridor. There has been a shift in the non-residential market towards a more east-west pattern of development, with all of the largest active and under review projects proposed south of Dundas St. Many of these are large, phased, mixed-use projects, proposed mainly on lands designated as *Mixed Use Areas* 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 99 projects in the Development Pipeline that are located in the *Centres* and which contain 10.5% of the city's proposed residential units. Collectively, these projects account for 41,879 residential units and 360,170 m² of non-residential GFA. Almost 78% of proposed residential units in the *Centres* are either approved but not yet built, or under review, so there will likely to be substantial construction in the *Centres* in coming years.

The residential projects in the *Centres* are generally high-density developments with an average of 511 residential units per project. This is the highest average project

Map 4: Downtown and Central Waterfront Residential Development Activity



Source: Land Use Information System II
Development projects with activity between January 1, 2014 and December 31, 2018. Built projects are those which became ready for occupancy and/or were completed. Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal.

Prepared by: Toronto City Planning Division, Research and Information - June 2019

Avenues

Centres and Downtown & Central Waterfront

Published: June 2019.

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	**145,644**	**100.0**	**10,849,793**	**100.0**		
Proposed Residential Units ≥ 1,000	**44,962**	**30.9**	**3,394,338**	**31.3**		
Built Projects	*3,772*	*8.4*	*249,034*	*7.3*		
90 HARBOUR ST	1,426	3.2	85,924	2.5	70	3
16 YORK ST [1]	1,343	3.0	87,650	2.6	67	2
50 ST JOSEPH ST	1,003	2.2	75,460	2.2	55	2
Active Projects	*18,098*	*40.3*	*1,421,977*	*41.9*		
325 GERRARD ST E	4,705	10.5	469,000	13.8	29	36
261 QUEENS QUAY E [2]	1,833	4.1	124,565	3.7	21	9
266-270 KING ST W	1,716	3.8	130,914	3.9	92	2
177 FRONT ST E	1,531	3.4	107,480	3.2	29	3
245 QUEEN ST E	1,468	3.3	103,572	3.1	37	3
6 GLEN RD	1,321	2.9	99,693	2.9	45	4
578 FRONT ST W	1,191	2.6	76,569	2.3	20	4
88 QUEEN ST E [3]	1,146	2.5	85,666	2.5	49	3
363 YONGE ST	1,106	2.5	74,735	2.2	85	1
37 YORKVILLE AVE	1,077	2.4	95,533	2.8	67	1
200 DUNDAS ST E	1,004	2.2	54,250	1.6	45	1
Projects Under Review	*23,092*	*51.4*	*1,723,327*	*50.8*		
55 LAKE SHORE BLVD E	4,369	9.7	340,296	10.0	90	7
1 YONGE ST	2,864	6.4	215,668	6.4	95	4
433 FRONT ST W	2,750	6.1	208,300	6.1	59	8
429 LAKE SHORE BLVD E	2,280	5.1	153,960	4.5	55	13
33 GERRARD ST W	2,138	4.8	127,122	3.7	88	4
400 FRONT ST W	1,937	4.3	143,216	4.2	59	4
571 DUNDAS ST W [4]	1,687	3.8	160,350	4.7	21	14
2 BLOOR ST W	1,507	3.4	121,235	3.6	69	3
23 SPADINA AVE	1,373	3.1	98,303	2.9	69	1
215 LAKE SHORE BLVD E	1,174	2.6	83,263	2.5	49	3
309 CHERRY ST [5]	1,013	2.3	71,614	2.1	52	3

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

Development projects with activity between January 1, 2014 and December 31, 2018. 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.

Notes:

1: Residential portion of a phased project originally submitted as 16 York St.
2: Complete Residential GFA information for 261 Queens Quay E is not yet available
3: Phase 2 only; Phase 1 is recorded as a separate project.
4: Phase 2 only; Phase 1 is recorded as a separate project.

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

Non-Residential Projects	Project Location	Proposed Non-Residential GFA (m²)	Percent
City of Toronto		**11,156,126**	**100.0**
Proposed Non-Residential GFA ≥50,000 m²		4,914,574	44.1
Built Projects		*888,118*	*18.1*
1201 WILSON AVE	Outside Growth Areas	197,884	*4.0*
120 BREMNER BLVD	Downtown	98,995	*2.0*
40 ADELAIDE ST W [1]	Downtown	94,124	*1.9*
100 ADELAIDE ST W	Downtown	86,960	*1.8*
90 HARBOUR ST	Downtown	86,610	*1.8*
10-20 BAY ST	Downtown	81,772	*1.7*
661 UNIVERSITY AVE [2]	Downtown	66,974	*1.4*
61 FRONT ST W [3]	Downtown	65,861	*1.3*
18 YORK ST	Downtown	57,792	*1.2*
30 WESTON RD	Employment Areas	51,147	*1.0*
Active Projects		*2,190,517*	*44.6*
21 DON VALLEY PKWY	Employment Areas	925,314	*18.8*
82 BUTTONWOOD AVE	Outside Growth Areas	168,845	*3.4*
45 BAY ST	Downtown	143,362	*2.9*
141 BAY ST	Downtown	124,485	*2.5*
156 FRONT ST W	Downtown	115,515	*2.4*
2233 SHEPPARD AVE W	Employment Areas	102,991	*2.1*
171 FRONT ST W	Downtown	100,200	*2.0*
880 BAY ST	Downtown	80,622	*1.6*
40 TEMPERANCE ST [4]	Downtown	75,322	*1.5*
16 YORK ST [5]	Downtown	74,392	*1.5*
11 CENTRE AVE	Downtown	60,429	*1.2*
158 STERLING RD	Employment Areas	59,857	*1.2*
245 QUEEN ST E	Downtown	54,702	*1.1*
1001 QUEEN ST W	Avenues	54,463	*1.1*
2200 ISLINGTON AVE	Employment Area	50,018	*1.0*
Projects Under Review		*1,835,939*	*37.4*
25 KING ST W	Downtown	180,259	*3.7*
3401 DUFFERIN ST	Outside Growth Areas	160,066	*3.3*
433 FRONT ST W	Downtown	155,700	*3.2*
440 FRONT ST W	Downtown	148,713	*3.0*
1 YONGE ST	Downtown	141,175	*2.9*
30 BAY ST	Downtown	135,029	*2.7*
555 REXDALE BLVD	Employment Area	107,645	*2.2*
629 EASTERN AVE	Employment Area	96,715	*2.0*
844 DON MILLS RD	Employment Area	85,545	*1.7*
865 YORK MILLS RD	Employment Area	85,399	*1.7*
2280 DUNDAS ST W	Avenues	83,657	*1.7*
55 LAKE SHORE BLVD E	Downtown	80,409	*1.6*
900 YORK MILLS RD	Employment Area	78,495	*1.6*
721 EASTERN AVE	Employment Area	74,399	*1.5*
5951 STEELES AVE E	Employment Area	64,365	*1.3*
850 YORK MILLS RD	Employment Area	56,430	*1.1*
202 JARVIS ST	Downtown	51,065	*1.0*
333 KING ST E	Downtown	50,873	*1.0*
Proposed Non-Res GFA between 10,000 m2 and 49,999 m2		3,888,988	*34.9*
Proposed Non-Res GFA less than 10,000 m2		2,407,542	21.6

Source: City of Toronto, City Planning: Land Use Information System II. Development projects with activity between January 1, 2014 and December 31, 2018. 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.

1: Phase 2 of a larger 3 phase including 40 Adelaide St. W, 40 Temperance St. and 333 Bay St. project.

2: Second phase of the MARS project.

3: Union Station Revitalization project has become partially ready for occupancy although substantial work is still outstanding.

4: Phase 3 of a larger 3 phase including 40 Adelaide St. W, 40 Temperance St. and 333 Bay St. project.

5: Phase 3 of a larger 3 phase project.

size in the growth management areas. In comparison, residential projects in *Downtown* have an average of 451 units while the citywide average is 303 units per project.

Avenues

The *Avenues* are corridors along major streets that are well served by transit and expected to redevelop incrementally over time. They play an important role within Toronto's urban structure by providing locations for redevelopment outside of the *Centres* and *Downtown*. The *Avenues* have 85,459 residential units and 782,519 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.

More than three quarters of the residential units are in projects that are active or under review. Combined, these units represent three times the magnitude of housing supply that have been built along *Avenues* over the past five years. This trend represents the successful uptake of the *Avenues* policy framework and points to ongoing strength in residential development in these areas in coming years.

Over 338,000 m^2 of non-residential GFA has been built or active in *Avenues* over the past five years. In addition, 444,265 m^2 or 57% of proposed non-residential GFA in the *Avenues* is still under review, indicating that there is also likely to be substantial non-residential construction on the *Avenues* 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* and encourage a broad range

Mid-rise Development in Toronto

The height of buildings that are categorized as "mid-rise" varies from street to street as the City defines mid-rises as buildings that are no taller than the width of their adjacent street right-of-way, the publicly owned portion of the street. In Toronto, on the narrower 20 metre wide streets in *Downtown*, a mid-rise building can be five or six stories high. On the wider arterial streets outside of *Downtown*, a mid-rise building may be taller, up to a maximum of 11 storeys on the widest *Avenues*.[1] For the purposes of this bulletin, mid-rise projects are defined as projects where the tallest proposed building is between five and 11 stories tall.

There are 363 mid-rise projects in the current Pipeline. These projects propose 31,759 residential units and 1.41 million m^2 of non-residential GFA. Almost half of the proposed mid-rise projects are along the *Avenues*, totaling 16,444 residential units and almost 185,000 m^2 of non-residential GFA (see Map 5 on page 15). Of the 16,444 units in the Development Pipeline along the *Avenues*, 24.1% are built, 32.2% are active, and the remaining 43.7% are under review.

Built mid-rise projects are concentrated in *Downtown*, west of *Downtown*, and along Sheppard Avenue East, St. Clair Avenue West, and Kingston Road. More recent mid-rise development proposals that are active and under review are more dispersed throughout the city yet still tend to be along the *Avenues,* reflecting the policies of the Official Plan.

Over a quarter (26.7%) of mid-rise projects are located outside of *Downtown*, the *Centres*, the *Avenues*, and *Mixed Use Areas*. These mid-rise projects account for 8,415 residential units and 835,986 m^2 of non-residential GFA.

Mid-rise along the Avenues and the impact of Avenue Studies

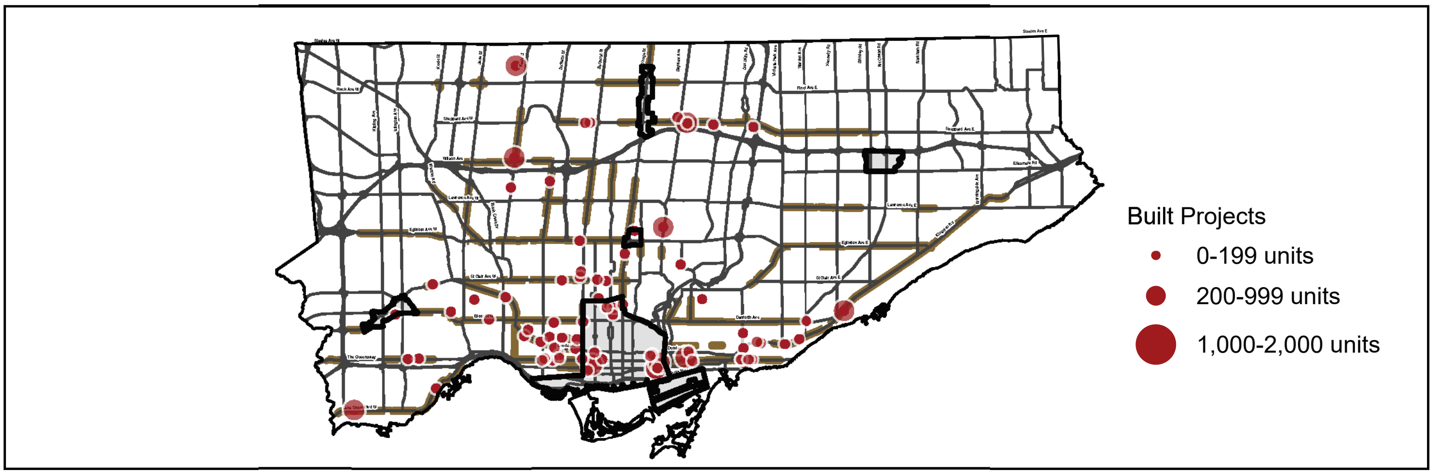
One fifth (21.5%) of all proposed residential units in the Development Pipeline are along the *Avenues*. The Official Plan policies call for *Avenue* Studies to be carried out to facilitate and shape development along the *Avenues*, resulting in an *Avenue* specific zoning by-law. To date, 18 *Avenue* Studies have been completed resulting in by-laws. So far, 16% of the land parcels associated with the *Avenues* have been subject to an *Avenue* Study and subsequently have by-laws in force, and 15% of proposed mid-rise units along the *Avenues* reside on these by-law implemented lands.

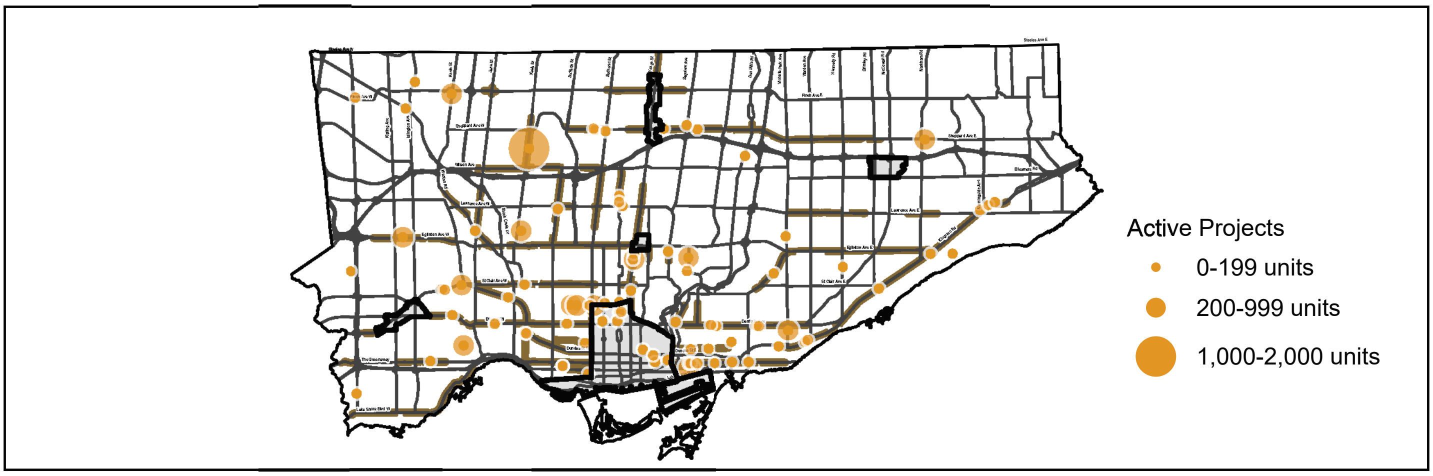
Mid-rise projects residing on *Avenues* with by-laws in force propose on average more units per project (112) than those on *Avenues* without by-laws in force (92).

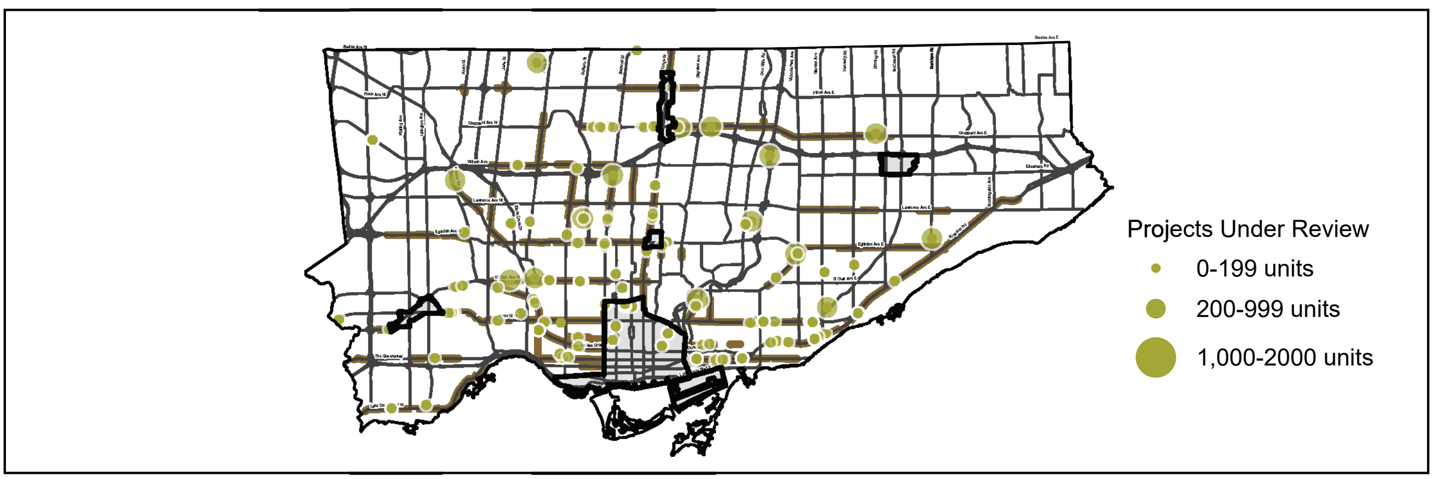
Mid-rise projects along the *Avenues* on by-law implemented lands are subject to substantially fewer re-zonings and Official Plan Amendments compared to the rest of the *Avenues* with 46% versus 80%. Therefore, *Avenues* Studies continue to be a valuable tool for guiding development along the *Avenues.* This demonstrates the value of the *Avenues* policy and implementation strategy, to pre-zone land well-served by transit and primed for growth through community consultation.

1 For more information about mid-rise buildings, please visit: https://www.toronto.ca/city-government/planning-development/official-plan-guidelines/design-guidelines/mid-rise-buildings/.

Map 5: Proposed Mid-Rise Development by Status







Source: Land Use Information System II
Mid-rise is defined as a development project for which the tallest proposed building is between 5 and 11 storeys.
Development projects with activity between January 1, 2014 and December 31, 2018. Built projects are those which became ready for occupancy and/or were completed. Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal.

Prepared by: Toronto City Planning Division, Research and Information - June 2019

Avenues

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Centres and Downtown & Central Waterfront

Published: June 2019.

of commercial, residential and institutional uses. The additional *Mixed Use Areas* have 62,293 residential units and 1.0 million m^2 of non-residential GFA proposed. This accounts for 16% of the city's proposed residential units and 9% of its proposed non-residential GFA. Over 85% 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.

All Other Areas

Over 62,000 residential units, or 16% 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 infill developments in areas designated as *Neighbourhoods*. Half of the residential units proposed in All Other Areas are under review.

There is 4.6 million m^2 of non-residential GFA proposed in these Other Areas. Three-quarters of this space is located in the designated *Core* or *General Employment Areas* which the Official Plan also targets for non-residential growth. Half of non-residential GFA proposed in All Other Areas is approved but not yet built.

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 *Downtown*, the *Centres* and the *Avenues*. Map 6 (on page 17) displays the areas of the in-force Secondary Plans and the locations of development projects within each one.

As seen in Table 10a (on page 18), 857 projects or 39% of the total in the Pipeline are proposed in Secondary Plan areas. These projects propose 255,699 residential units and 5.8 million m^2 of non-residential GFA. This represents 64% of the residential units and 52% of the non-residential GFA proposed in the entire city. The number of projects that are built, active, and under review are evenly distributed (see Table 10b (on page 19).

A number of areas covered by a Secondary Plan fall outside of *Downtown*, the *Centres* and the *Avenues*. There are 12,516 residential units and 444,382 m^2 of non-residential GFA proposed in Secondary Plan areas 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*, 88% of the residential units and 63% of the non-residential GFA in the Pipeline would be proposed in a growth management area.

The Downtown Plan

The Downtown Plan was adopted by Council at its meeting on May 22nd, 23rd and 24th, 2018.[4] This Secondary Plan is under review by the Minister of Municipal Affairs and Housing, pursuant to Section 26 of the *Planning Act.* This new Secondary Plan for *Downtown* excluding the *Central Waterfront* areas west of Bathurst and east of the Don River) provides an updated growth management framework for this rapidly changing area.[5]

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 growth within the city's most active location for development activity.

The Downtown Plan is the largest Secondary Plan in the city geographically and is unique as a local and national economic hub. Map 6 shows that the Downtown Plan area contains eight Secondary Plans within its borders, as well as portions of the Fort York Neighbourhood Secondary Plan and the Central Waterfront Secondary Plan area. Table 10a shows that the Downtown Plan contains the greatest number of development projects of all the Secondary Plan areas (436). Collectively these projects propose 142,473 residential units and account for 36% of all proposed residential units in the city. The area also contains nearly 4.3 million m^2 of non-residential GFA accounting for 73% of all proposed non-residential GFA in Secondary Plan areas.

Secondary Plan Areas within the Downtown Plan Area

The Central Waterfront Secondary Plan area contains the largest amount of non-residential GFA after the Downtown Plan area as a whole, with 845,559 m^2 of non-residential GFA proposed throughout the Central Waterfront. Most of this non-residential GFA in the Central Waterfront falls within the Downtown Plan area.