PH17.9 - Attachment 1 - Part 1

TORONTO City Planning

profile TO

This bulletin illustrates how the city has developed and how it will continue to grow over time. It provides an overview of all development projects with approval or construction activity between January 1, 2015 and December 31, 2019. Special topics include the City's pandemic response, the Growth Plan forecasts, and land use planning and heritage conservation working together. Available from https://www.toronto.ca/city-government/data-research-maps/research-reports/planning-development/

Development Pipeline 2020

Highlights

435,069 residential units and 12.1 million square metres of non-residential gross floor area (GFA) were proposed, representing all projects with development activity between January 1, 2015 and December 31, 2019.

There are 37,742 more residential units and 929,022 square metres more non-residential GFA in this pipeline compared to the 2018 Q4 pipeline.

92,641 new residential units were constructed between 2015 and 2019.

148,797 residential units and 5.2 million square metres of non-residential GFA are in active projects that have received at least one Planning approval but have not yet been built.

86% of new residential development is proposed in areas targeted for growth by the City's Official Plan.

89% 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 development with 35% of the residential units and 39% of the non-residential GFA proposed in the city.

Secondary Plan areas contain proposals for 60% of the residential units and 51% of the non-residential GFA proposed city-wide.

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 with access to infrastructure, 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 3.

Toronto's Development Pipeline

What is the Development Pipeline?

The City of Toronto's 2019 Development Pipeline consists of all development projects in the city of Toronto with any development activity over the last five years, between January 1, 2015 and December 31, 2019. The Pipeline provides a lens through which to monitor Toronto's near-term housing supply. A project is the collection of Planning and Building Applications having to do with a single site. 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 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 change has enabled each phase to be reflected in the Pipeline until that phase is either built or becomes inactive.

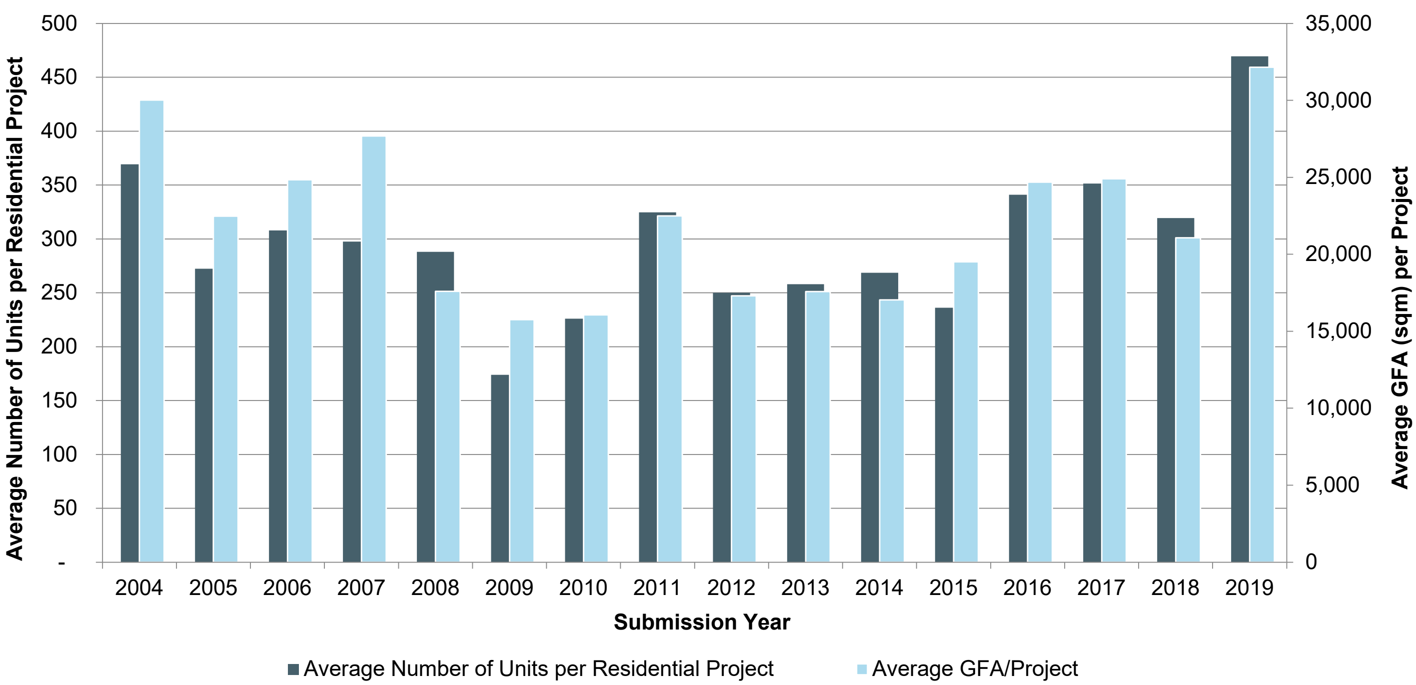
Projects are categorized into three general statuses, based on the stage of the development approvals and construction process they reached between January 1, 2015 and December 31, 2019.

- 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 their first Planning approval such as 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 but for which construction has not yet started; 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. An increasing number of projects still progressing through the development approvals process fell outside of the Pipeline window. Over time projects have become larger and more complex and subsequently require a longer review and construction process (see Figure 1). To address this issue, the Development Pipeline was enhanced in 2016 to identify projects with any approval or construction activity within the five-year timeframe to provide a more fulsome representation of near-term residential and non-residential supply in the city.

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

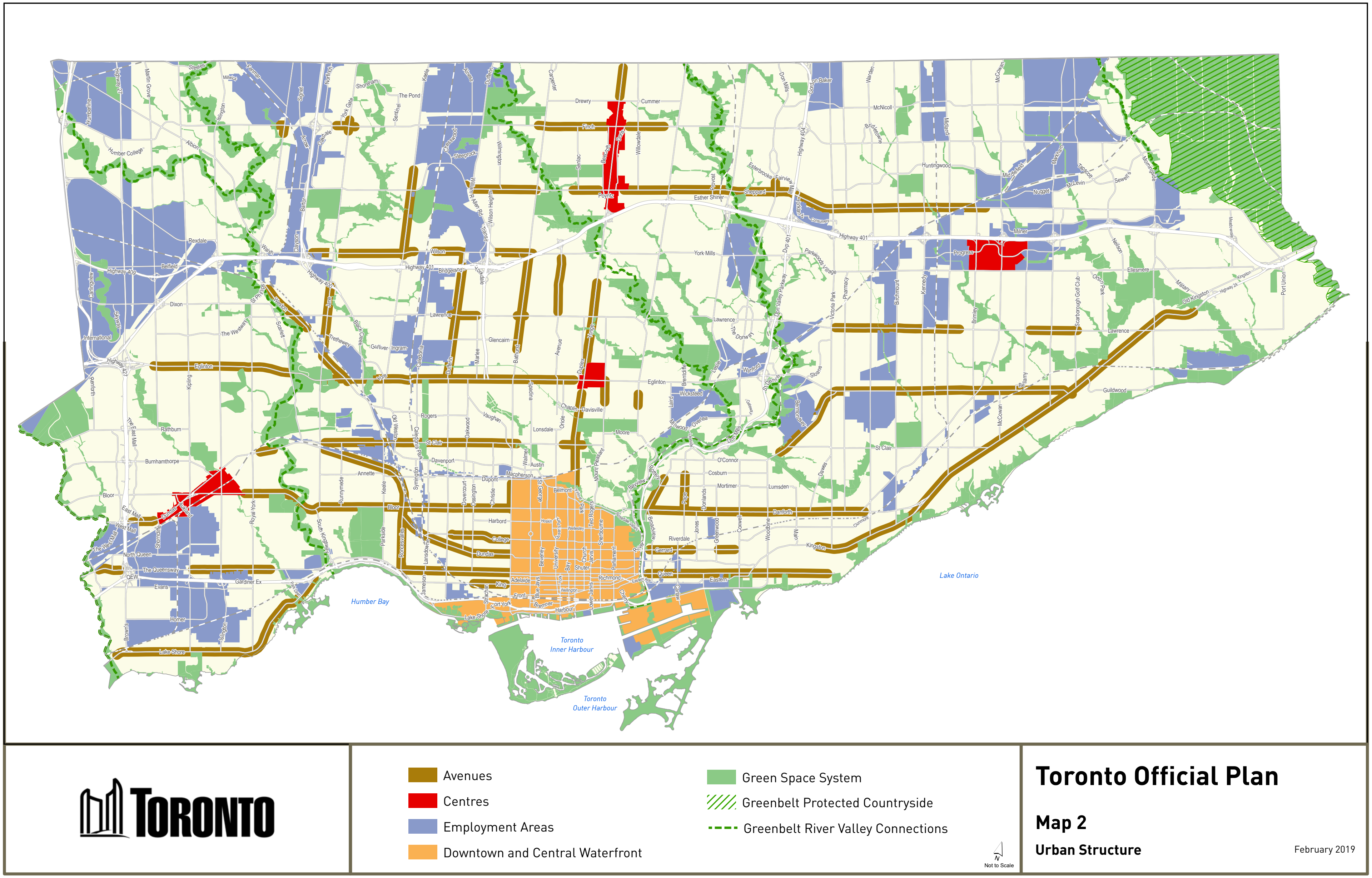


Source: City of Toronto, City Planning Division: Land Use Information System II

Development projects submitted between January 1, 2004 and December 31, 2019 and with activity between January 1, 2015 and December 31, 2019.

Proposed GFA includes residential and non-residential GFA.

Map 1: Official Plan Urban Structure Map



The Development Pipeline January 1, 2015 – December 31, 2019

Toronto continues to experience strong growth and development activity (see Maps 2 and 3 on pages 5 and 7). The 2019 Development Pipeline is comprised of 2,112 development projects (see Table 1). Cumulatively, these projects propose a record 435,069 residential units and 12,085,148 m^2 of non-residential gross floor area (GFA) (see Tables 2 and 3 on page 6).

The 2019 Pipeline contained 37,742 more residential units than the 2018 Pipeline which reported on projects active between January 1, 2014 and December 31, 2018. This increase represents 9.5% growth in the near-term housing supply in a single year. The 2019 Pipeline also contains 929,022 m^2 more non-residential GFA or 8.3% more space over the 2018 Pipeline. Despite this surge in supply, there were actually 80 fewer projects in the 2019 Pipeline. This is due to a continuing trend towards larger and more complex projects over the past five years by comparison to previous five-year periods.

The residential projects in Growth Areas are almost 12% larger on average than those elsewhere in the city. While the size of residential projects in the Downtown and Central Waterfront have grown slightly, projects in the Centres, along the Avenues and in Other Mixed Use Areas have grown by 30 to 65 units on average. This indicates a dispersal of growth and project size to more areas of the city. Average non-residential space per project has also increased significantly, in all areas except the Centres. Projects are also becoming larger within the Pipeline itself. Active residential projects are 22% larger than those already built; while residential projects under review are on average more than a third larger than those recently completed. The average amount of non-residential space in newly proposed projects is more than twice the average.

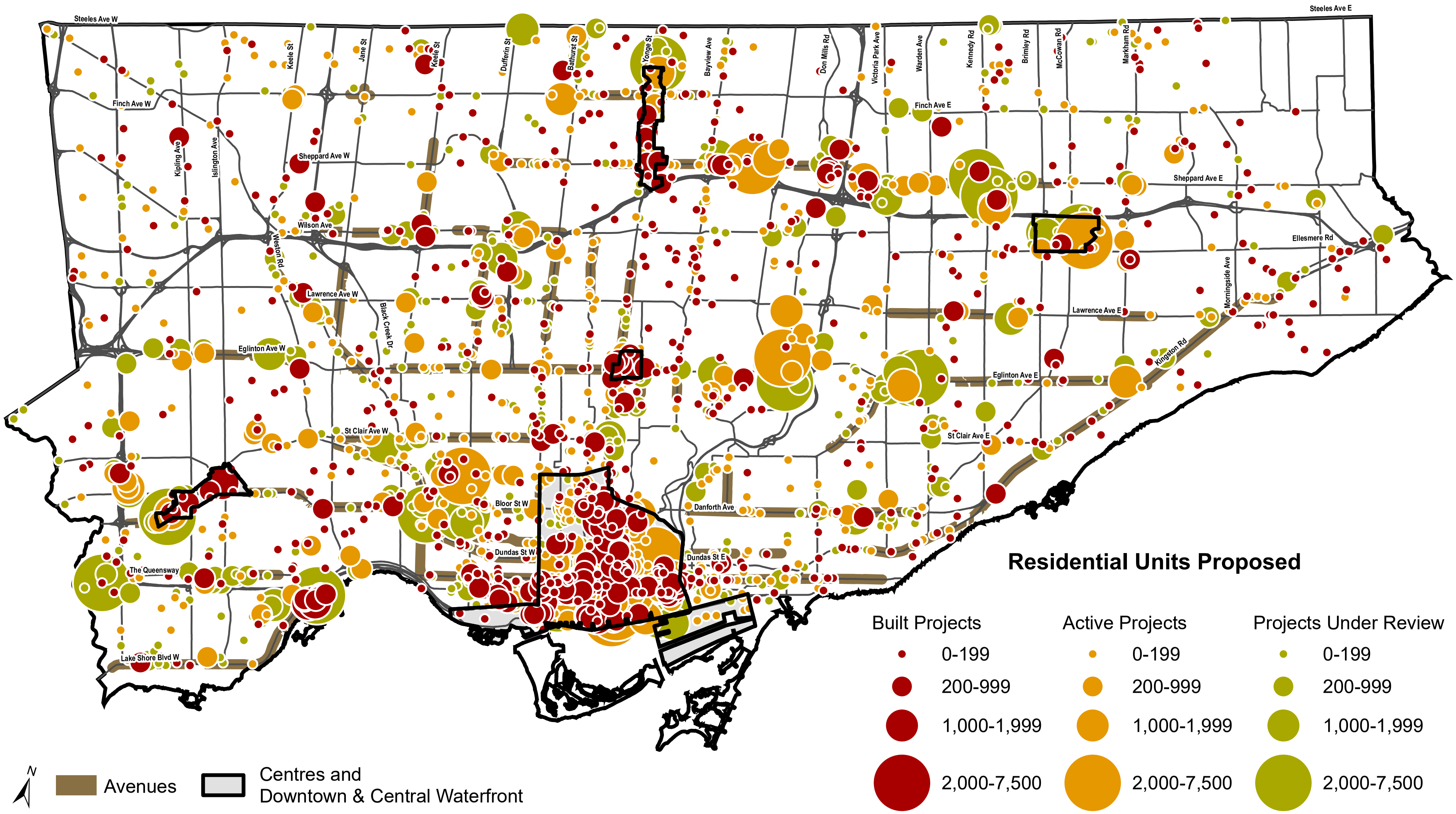
Table 1: Proposed Projects in City of Toronto by Status

	Built	Active	Under Review	Total in Pipeline	% of Total
City of Toronto	**710**	**717**	**685**	**2,112**	**100.0**
Growth Areas	**376**	**449**	**444**	**1,269**	**60.1**
Downtown and Central Waterfront	136	163	163	**462**	21.9
Centres	36	29	32	**97**	4.6
Avenues	135	177	176	**488**	23.1
Other Mixed Use Areas	69	80	73	**222**	10.5
All Other Areas	334	268	241	**843**	39.9

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

Development projects with activity between January 1, 2015 and December 31, 2019. 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.

Map 2: City of Toronto Proposed Residential Development



Source: Land Use Information System II
Development projects with activity between January 1, 2015 and December 31, 2019. 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, Planning Research and Analytics - October 2020

Published: October 2020.

As the average size of development projects increase, so does the magnitude of development approved by Council. Over the five years from 2015 to 2019, Council has approved more residential units than were built (see Table 4 on page 10). City Council approved an average of 26,676 residential units per year between 2015 and 2019, while 14,876 units on average were built annually. Over a five-year period, the gap between approved and built categories has resulted in a surplus of 59,001 units which have been approved but are not built yet.

This surplus helps to ensure that 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 residential and non-residential supply.

Built Projects

Many projects with development activity between 2015 and 2019 have become occupied and/or have completed construction during this period. In the current Pipeline, 710 projects (34% of the total) have completed construction or received a partial occupancy permit. These projects represent an addition of 92,641 newly constructed residential units to the city's housing supply and nearly 2,293,315 m^2 of non-residential GFA (see Figures 2 and 3 on pages 8 and 9).

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

	Built	Active	Under Review	Total in Pipeline	% of Total
City of Toronto	**92,641**	**148,797**	**193,631**	**435,069**	**100.0**
Growth Areas	**82,164**	**133,850**	**158,940**	**374,954**	**86.2**
Downtown and Central Waterfront	41,321	59,699	51,755	**152,775**	35.1
Centres	11,862	16,163	15,959	**43,984**	10.1
Avenues	20,092	27,288	49,154	**96,534**	22.2
Other Mixed Use Areas	8,889	30,700	42,072	**81,661**	18.8
All Other Areas	10,477	14,947	34,691	**60,115**	13.8

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

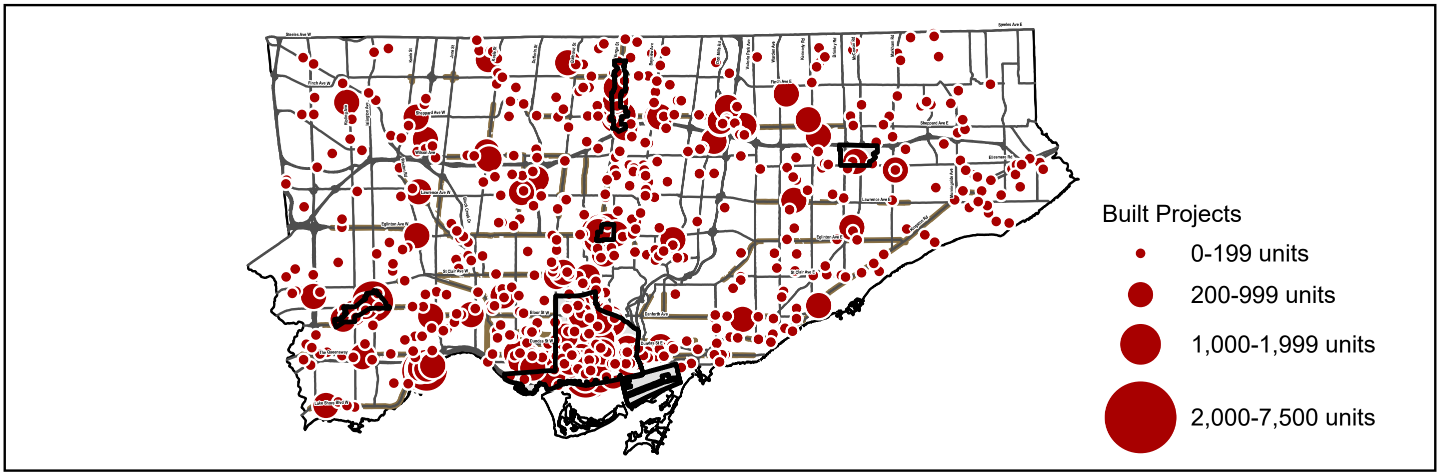
Proposed units in development projects with activity between January 1, 2015 and December 31, 2019. Built projects are those which became ready for occupancy and/or were completed. Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or those which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal.

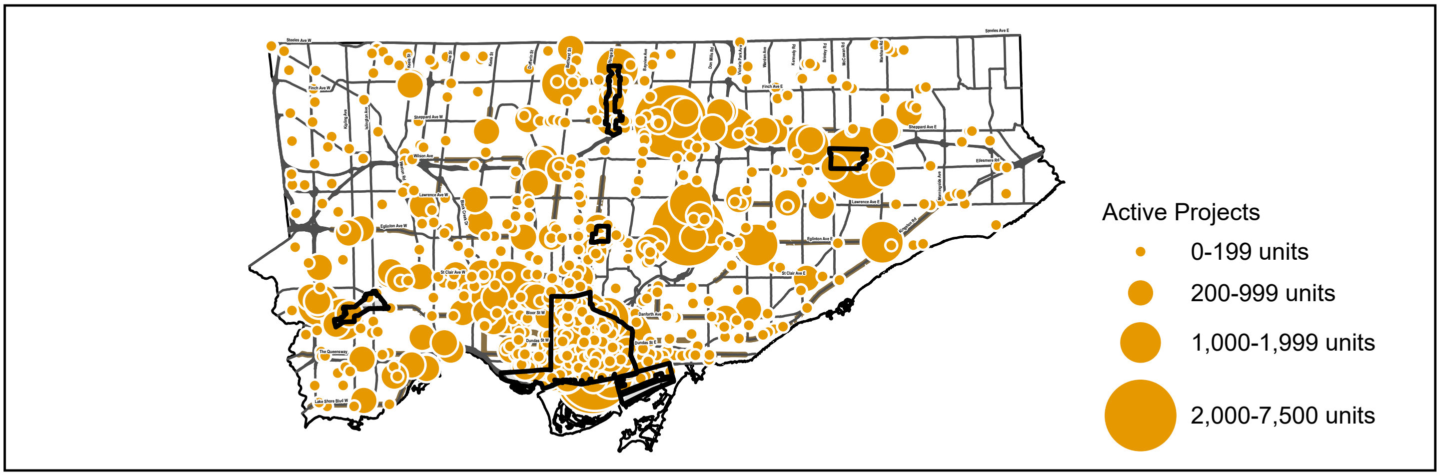
Table 3: Proposed Non-Residential GFA in City of Toronto by Status

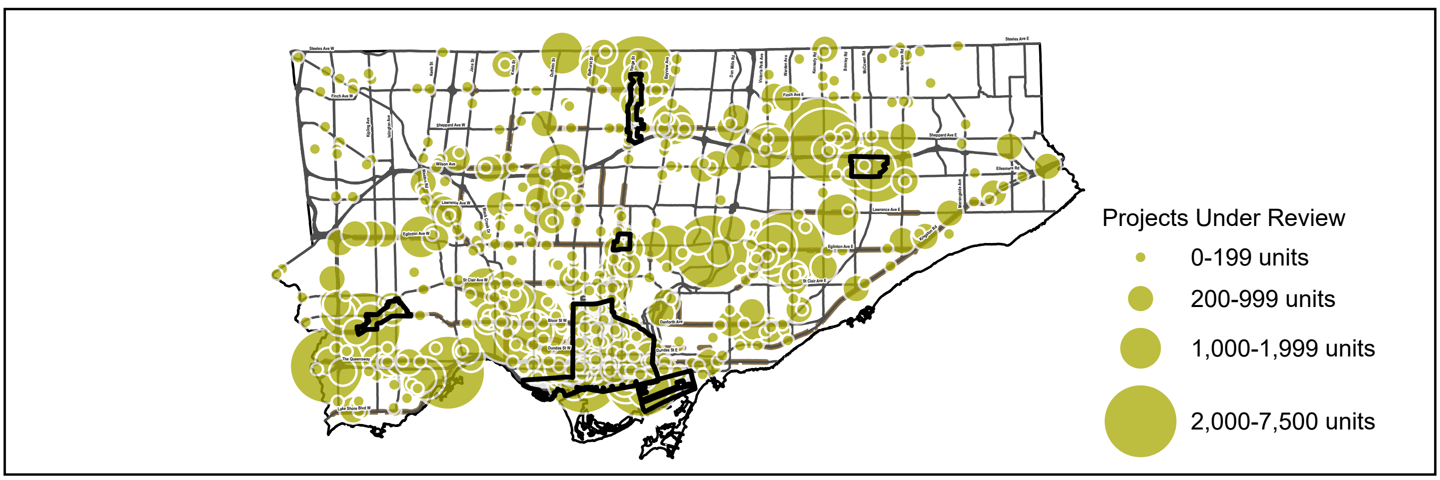
	Built	Active	Under Review	Total in Pipeline	% of Total
City of Toronto	**2,293,315**	**5,258,052**	**4,533,781**	**12,085,148**	**100.0**
Growth Areas	**1,480,357**	**2,698,143**	**3,101,178**	**7,279,678**	**60.2**
Downtown and Central Waterfront	1,025,862	1,824,926	1,858,313	**4,709,101**	39.0
Centres	82,330	112,811	123,109	**318,250**	2.6
Avenues	184,103	230,521	512,021	**926,645**	7.7
Other Mixed Use Areas	188,062	529,885	607,735	**1,325,682**	11.0
All Other Areas	812,958	2,559,909	1,432,603	**4,805,470**	39.8

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

Proposed non-residential GFA in development projects with activity between January 1, 2015 and December 31, 2019. 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.







Source: Land Use Information System II
Development projects with activity between January 1, 2015 and December 31, 2019. 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, Planning Research and Analytics - October 2020

Avenues

N

Centres and Downtown & Central Waterfront

Published: October 2020.

Active Projects

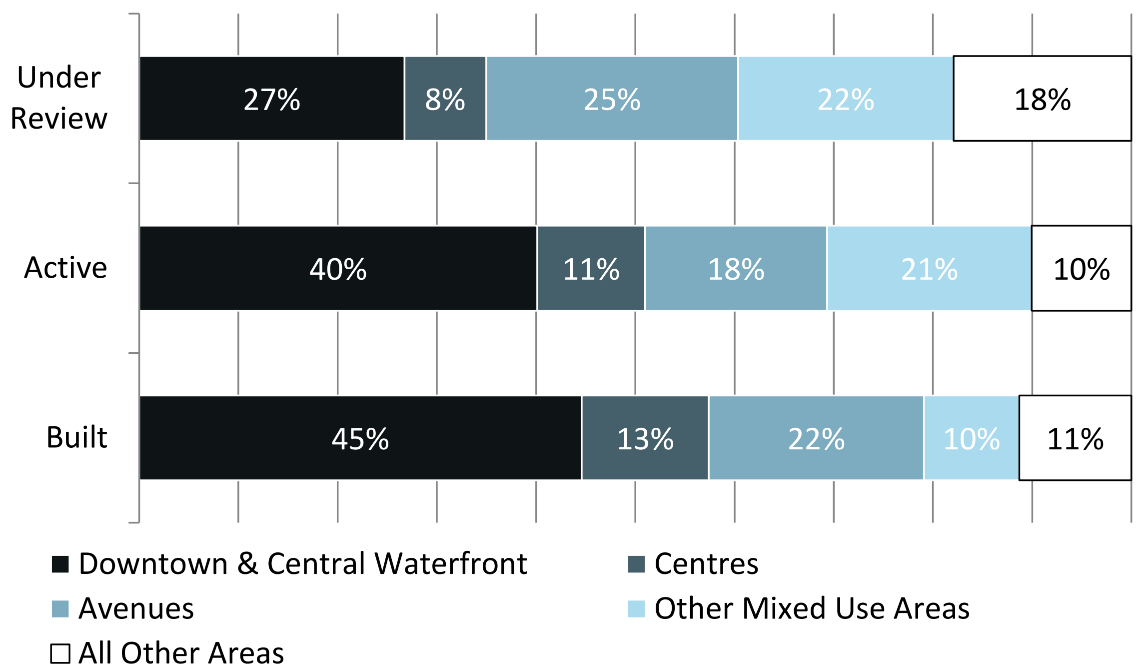
In the current Pipeline, 34% of projects are active with at least one Planning approval, accounting for 148,797 residential units and 5,258,052 m^2 of non-residential GFA. Residential projects that are approved but not yet built represent approximately 8 to 13 years of potential housing supply, given the range of the average pace of completions reported by Canada Mortgage Housing Corporation (CMHC) (see Table 5 on page 11). 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 12) shows all proposed residential units in active projects broken down by the stage of activity.

Projects Under Review

In the current Pipeline, there are 193,631 residential units and an additional 4,533,781 m^2 of non-residential GFA in projects currently under review. Figure 4 displays these units by status and shows that 45% of all proposed residential units are currently under review.

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 342,428 residential units and 9,791,833 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 a third.

Figure 2: Proposed Residential Units 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, 2015 and December 31, 2019. 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.

Dwelling Unit Completions and Absorptions

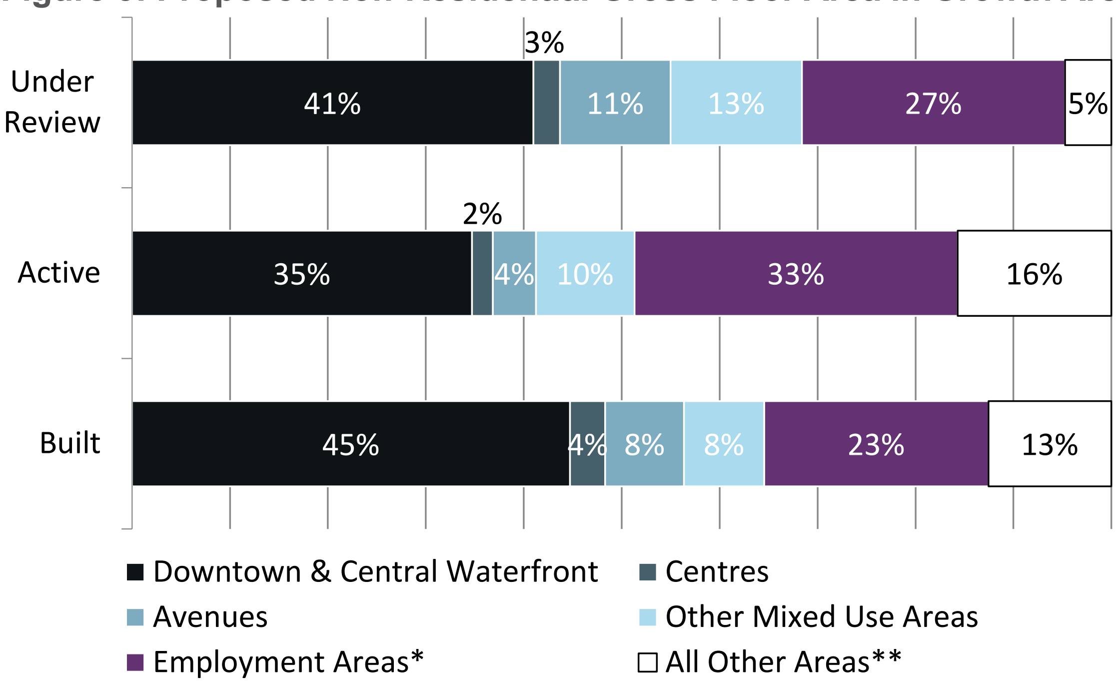
The city continues to be an exceptionally attractive location for residential development in the Greater Toronto Area (GTA). According to CMHC, Toronto has represented about a third of the housing completions in the GTA since 1990 (33.2%, see Table 5 on page 11). Toronto's housing construction has recovered from the 2008 global recession (see Figure A.1 in the Appendix on page 44). The number of units completed in 2015 was nearly double the average number of units completed between 2005 and 2019. In 2019, 14,593 units were completed.

High-density condominium apartments continue to dominate the new construction landscape in Toronto. CMHC recorded 91,626 residential units completed in Toronto from 2015 to 2019 and 81% 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 13) compares the number of completions and absorptions in Toronto over the last 15 years. The average percentage of unabsorbed units has decreased to 1.3% for the 2015 to 2019 time period from 6.4% between 2010 and 2014.

The Market Absorption Survey demonstrates that the bulk of the unabsorbed units are in the purpose-built rental market. Purpose-built rental completions represented 9.9% of total completions from 2015 to 2019, but only 8.4% of total absorptions (see Table A.2 in the Appendix on page 45). The higher rate of unabsorbed rental units is not the result of an oversupply of this type of unit. 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.

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, 2015 and December 31, 2019. 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.

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 2019 Development Pipeline shows that 86% of residential development and 60% 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 4: Residential Units Approved and Built by Year

Year	Units Approved	Units Built
2015	20,905	14,969
2016	17,058	16,683
2017	26,393	10,939
2018	35,684	18,772
2019	33,340	13,016
Total	**133,380**	**74,379**
Average	26,676	14,876

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

Units in development projects with activity between January 1, 2015 and December 31, 2019. 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 2015 but had other development activity (such as an application for a Draft Plan of Condominium) during the pipeline window of January 1, 2015 to December 31, 2019. 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.

Downtown and Central Waterfront

The Downtown and Central Waterfront area is one of the most prominent locations for development activity across the city and contains the largest percentage of proposed projects of any single area. In the current Development Pipeline, the projects submitted in this area proposed 152,775 new units and 4,709,101 m^2 of non-residential GFA. This comprises 35% of the residential units and 39% of the non-residential GFA proposed in the entire city (see Tables 2 and 3 on page 6).

Map 4 (on page 14) 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 15). 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 and the Central Waterfront. In the current Pipeline, there are 10 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 16). Many of the largest projects with non-residential components are mixed-use projects that incorporate housing. While most of the major projects are primarily office space, there are notable examples with other types of non-residential uses Downtown including:

- The ongoing Union Station Revitalization at 61 Front St W;
- The approved new courthouse at 11 Centre Ave; and
- The proposed Ryerson University student residence at 202 Jarvis St.

These projects are in addition to 21 other development projects in

Dundas Street Name Review

It is important to note here that recent local and world events have led to discussions on racial injustices, inequality and anti-Black racism which in turn have resulted in scrutiny of the origins and history of monuments, street names, parks and buildings across the city. These conversations have also led to the creation of an online petition by members of the public calling for Dundas Street to be renamed. In September 2020, City staff prepared a Staff Report addressing the request to rename Dundas Street, also proposing that the City look at how systematic racism and discrimination may be embedded in other City assets, commemorative programs and naming policies. For more information and the City's next steps, please see the Dundas Street Name Review on the City's website.

Table 5: Dwelling Completions, Greater Toronto Area

Year	Toronto	GTA	Toronto % of GTA
1990 - 1994	36,362	127,003	28.6%
1995 - 1999	26,395	120,941	21.8%
2000 - 2004	52,826	214,512	24.6%
2005 - 2009	60,265	187,342	32.2%
2010 - 2014	67,505	167,797	40.2%
2015 - 2019	91,626	190,015	48.2%
Total	**334,979**	**1,007,610**	**33.2%**
Average 1990-2019	11,166	33,587	33.2%
Average 2010-2019	15,913	35,781	44.5%
Average 2015-2019	18,325	38,003	48.2%

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

Note: Completions are for whole calendar years.

Downtown, in total proposing 2,547,600 m^2 of non-residential floor space in total.

Map 4 (on page 14) also shows a strong north-south concentration of recently built non-residential development activity between University Avenue and Yonge Street, with the largest built projects located in this corridor. Development has also been shifting further east and west from the Financial District (or University/Yonge corridor), south of Dundas Street. 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. More recently, there has been a concentration of smaller projects (under 50,000 m^2), particularly those projects which are under review, proposing development with a non-residential component along and north of College St.

Table 6: Proposed Residential Units in Active Projects by Stage

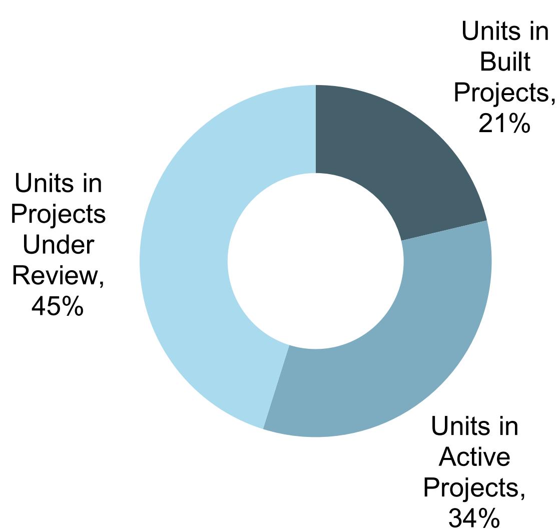
Stage as of December 31, 2019		Proposed Active Residential Units		Active Residential Projects	
Stage	**Stage Description**	**Number**	**Percent**	**Number**	**Percent**
2	Delegated / Council Approval*	57,490	39%	182	39%
3	Permit Application	16,114	11%	58	12%
4	Issuance of a Permit	5,200	4%	22	5%
5	Work Started	69,993	47%	205	44%
Total		**148,797**	**100%**	**467**	**100%**

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

Active development projects with activity between January 1, 2015 and December 31, 2019. 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.

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, 2015 and December 31, 2019. 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.

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 97 projects in the Development Pipeline that are located in the Centres and collectively contain 10.1% of the city's proposed residential units. In total, these projects account for 43,984 residential units and 318,250 m^2 of non-residential GFA. Almost 73% of proposed residential units in the Centres are either approved but not yet built, or under review, so there is 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 453 residential units per project. This is the highest average project size in the growth management areas. In comparison, residential projects in Downtown have an average of 331 units while the citywide average is 206 units per project (see Table A.1 in the Appendix on page 44).

Avenues

The Avenues are corridors along major streets that are well served by transit and are 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 96,534 residential units and 926,645 m^2 of non-residential GFA proposed in the Development Pipeline. This represents 22% of the city's proposed units and 8% of its proposed non-residential GFA.

Table 7 : Household Type by Tenure and Condominium Status, City of Toronto

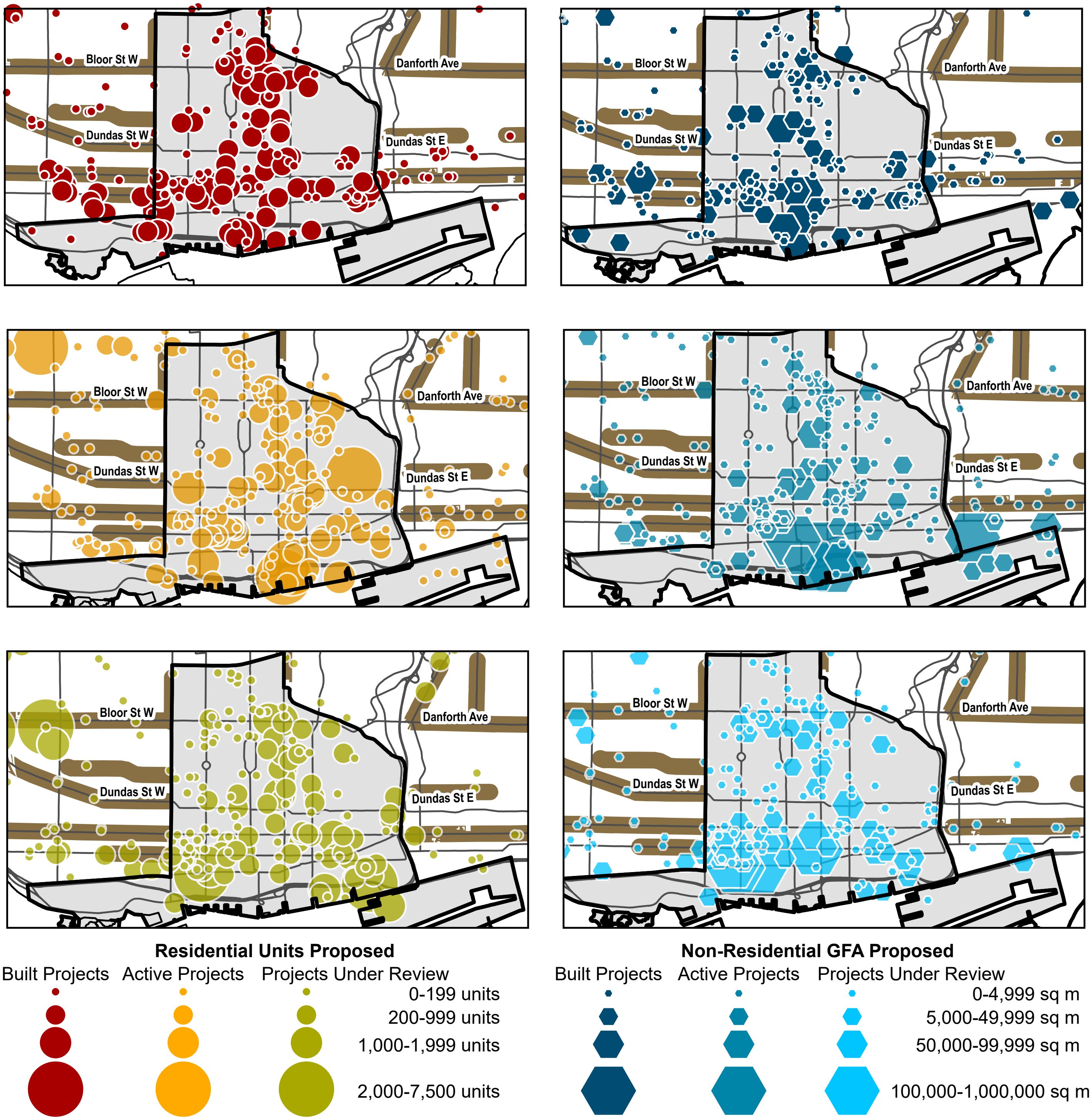
Year	Completions	Absorptions	Net Completions	"Unabsorbed" Percentage
2005	15,136	15,126	10	0.1%
2006	12,420	11,962	458	3.8%
2007	6,786	7,159	-373	-5.2%
2008	13,450	12,878	572	4.4%
2009	12,473	11,704	769	6.6%
2010	13,088	12,075	1,013	8.4%
2011	16,850	15,868	982	6.2%
2012	13,474	12,009	1,465	12.2%
2013	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%
2019	14,593	13,850	743	5.4%
Total	**219,396**	**212,729**	**6,667**	**3.1%**
2005-2019 Average	**14,626**	**14,182**	**444**	**3.1%**
2005-2009 Average	12,053	11,766	287	2.4%
2010-2014 Average	13,501	12,688	813	6.4%
2015-2019 Average	18,325	18,092	233	1.3%

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, 2020 year-to-date data has been excluded.

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

Map 4: Downtown and Central Waterfront Development Activity



Source: Land Use Information System II
Development projects with activity between January 1, 2015 and December 31, 2019. 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, Planning Research and Analytics - October 2020

Avenues

N

Centres and Downtown & Central Waterfront

Published: October 2020.

Table 8: Downtown and Central Waterfront Development Projects Proposing at least 1,000 Residential Units

	Proposed Residential Units		Proposed Residential GFA (m²)		Proposed Storeys (Tallest Building)	Proposed Buildings
	#	%	#	%	#	#
Downtown and Central Waterfront	**145,644**	**100.0**	**10,849,793**	**100.0**		
Proposed Residential Units ≥ 1,000	**45,009**	**30.9**	**3,459,072**	**31.9**		
Built Projects	*4,963*	11.0	*325,603*	*9.4*		
90 HARBOUR ST	1,426	3.2	85,924	2.5	70	3
16 YORK ST[1]	1,343	3.0	87,650	2.5	67	2
578 FRONT ST W	1,191	2.6	76,569	2.2	20	4
50 ST JOSEPH ST	1,003	2.2	75,460	2.2	55	2
Active Projects	*25,008*	*55.6*	*2,023,581*	58.5		
325 GERRARD ST E	4,705	10.5	469,000	13.6	29	36
55 LAKE SHORE BLVD E	4,571	10.2	340,588	9.8	90	5
1 YONGE ST	2,864	6.4	215,668	6.2	95	4
571 DUNDAS ST W[2]	1,900	4.2	199,464	5.8	21	17
261 QUEENS QUAY E[3]	1,833	4.1	127,292	3.7	21	9
266-270 KING ST W	1,716	3.8	130,914	3.8	92	2
177 FRONT ST E	1,531	3.4	107,480	3.1	29	3
23 SPADINA AVE	1,373	3.1	108,552	3.4	69	2
6 GLEN RD	1,321	2.9	99,693	2.9	45	4
363 YONGE ST	1,103	2.5	75,636	2.2	83	1
37 YORKVILLE AVE	1,079	2.4	95,044	2.7	67	1
200 DUNDAS ST E	1,012	2.2	54,250	1.6	45	1
Projects Under Review	*15,038*	*33.4*	*1,109,888*	32.1		
433 FRONT ST W	2,750	6.1	208,300	6.0	59	8
429 LAKE SHORE BLVD E	2,280	5.1	153,960	4.5	55	13
400 FRONT ST W	1,906	4.2	142,388	4.1	59	3
33 GERRARD ST W	1,667	3.7	118,672	3.4	85	4
2 BLOOR ST W	1,595	3.5	121,095	3.5	75	3
80 BLOOR ST W	1,430	3.2	114,268	3.3	79	1
245 QUEEN ST E	1,250	2.8	96,790	2.8	33	3
215 LAKE SHORE BLVD E	1,147	2.5	82,801	2.4	49	3
309 CHERRY ST[4]	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, 2015 and December 31, 2019. 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: Phase 2 only; Phases 1a and 1b are recorded as separate projects.

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

4: Phase 2 only; Phase 1 is recorded as a separate project.

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

	Project Location	Proposed Non-Residential GFA (m²)	Percent	
City of Toronto		**12,085,148**	**100.0**	
Proposed Non-Residential GFA ≥50,000 m²		***5,580,083***	***46.2***	***100.0***
Built Projects		*595,872*		*10.7*
40 ADELAIDE ST W[1]	Downtown	94,124		*1.7*
100 ADELAIDE ST W	Downtown	86,960		*1.6*
90 HARBOUR ST	Downtown	86,610		*1.6*
10-20 BAY ST	Downtown	81,772		*1.5*
661 UNIVERSITY AVE[2]	Downtown	68,291		*1.2*
61 FRONT ST W[3]	Downtown	65,861		*1.2*
18 YORK ST	Downtown	57,792		*1.0*
1001 QUEEN ST W	Avenues	54,463		*1.0*
Active Projects		*3,018,103*		*54.1*
21 DON VALLEY PKWY	Employment Areas	925,314		*16.6*
1201 WILSON AVE	Outside Growth Areas	197,884		*3.5*
82 BUTTONWOOD AVE	Outside Growth Areas	168,845		*3.0*
45 BAY ST	Downtown	143,362		2.6
1 YONGE ST	Downtown	141,175		*2.5*
6351 STEELES AVE E	Employment Areas	128,743		*2.3*
141 BAY ST	Downtown	127,816		*2.3*
30 BAY ST	Downtown	123,854		*2.2*
171 FRONT ST W	Downtown	118,707		*2.1*
156 FRONT ST W	Downtown	115,515		*2.1*
555 REXDALE BLVD	Employment Areas	107,645		*1.9*
2233 SHEPPARD AVE W	Employment Areas	102,991		*1.8*
844 DON MILLS RD	Other Mixed Use Area	85,545		*1.5*
880 BAY ST	Downtown	80,622		*1.4*
721 EASTERN AVE	Employment Areas	74,399		*1.3*
16 YORK ST[4]	Downtown	74,392		*1.3*
55 LAKE SHORE BLVD E	Downtown	73,993		*1.3*
11 CENTRE AVE	Downtown	64,773		*1.2*
158 STERLING RD	Employment Areas	59,857		*1.1*
1181 SHEPPARD AVE E	Avenues	52,500		*0.9*
17 VICKERS RD	Employment Areas	50,171		*0.9*
Projects Under Review		*1,966,109*		*35.2*
325 FRONT ST W	Downtown	274,818		*4.9*
25 KING ST W	Downtown	187,611		*3.4*
3401 DUFFERIN ST	Other Mixed Use Area	160,066		*2.9*
433 FRONT ST W	Downtown	155,700		*2.8*
440 FRONT ST W	Downtown	148,713		*2.7*
40 RAKELY CRT	Employment Areas	126,615		*2.3*
25 THE WEST MALL	Other Mixed Use Area	114,702		*2.1*
2150 LAKE SHORE BLVD W	Employment Areas	106,944		*1.9*
629 EASTERN AVE	Employment Areas	96,715		*1.7*
2280 DUNDAS ST W	Avenues	83,657		*1.5*
150 SHERWAY DR	Outside Growth Areas	81,960		*1.5*
900 YORK MILLS RD	Employment Areas	78,495		*1.4*
40 TEMPERANCE ST[5]	Downtown	73,865		*1.3*
5951 STEELES AVE E	Employment Areas	64,365		*1.2*

Table 9 continues on next page

Table 9 continued

	Project Location	Proposed Non-Residential GFA (m²)	Percent	
850 YORK MILLS RD	Employment Areas	56,430		*1.0*
1395 TAPSCOTT RD	Employment Areas	54,179		*1.0*
333 KING ST E	Downtown	50,873		*0.9*
202 JARVIS ST	Downtown	50,402		*0.9*
Proposed Non-Res GFA between 10,000 m² and 49,999 m²		***4,068,547***	***33.7***	***72.9***
Proposed Non-Res GFA less than 10,000 m²		***2,382,487***	***19.7***	***42.7***

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

Development projects with activity between January 1, 2015 and December 31, 2019. 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.

Notes:

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 ready for occupancy although substantial work is still outstanding.

4: Phase 3 of a larger 3 phase project.

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

More than three quarters of the proposed residential units are in projects that are active or under review. These units represent 4.8 times the magnitude of housing supply that has been built along Avenues over the past five years. This trend illustrates the successful uptake of the Avenues policy framework and points to ongoing strength in residential development in these areas in coming years.

About 414,624 m² of non-residential GFA has been built or is in active projects along the Avenues. In addition, 512,021 m² or 55% of proposed non-residential GFA along 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 of commercial, residential and institutional uses. The additional Mixed Use Areas have 81,661 residential units and 1,325,682 million m² of non-residential GFA proposed. This accounts for 18.8% of the city's proposed residential units and 11.0% of its proposed non-residential GFA. Over 89% of the proposed residential units in these areas are either under review or active. 86% of the proposed non-residential development is Active and Under Review.

All Other Areas

Over 60,000 residential units or 13.8% 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. Over half of the residential units proposed in All Other Areas are under review.

There is 4,805,470 m² 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. Over 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 35 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 5 (on page 21) displays the areas of the in-force Secondary Plans and the locations of development projects within each one.

As seen in Table 10b (on page 20), 853 projects, or 40.4% of the total in the Pipeline are proposed in Secondary Plan areas. These projects propose 262,852 residential units and 6,201,455 m^2 of non-residential GFA. This represents 60.4% of the residential units and 51.3% 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 10a on page 19).

A number of areas covered by a Secondary Plan fall outside of Downtown, the Centres and the Avenues. There are 10,826 residential units and 394,896 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, 89% of the residential units and 64% 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 was approved, with modifications, by the Minister of Municipal Affairs and Housing on June 5, 2019. 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 5 (on page 21) 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 (on page 19) shows that the Downtown Plan contains the greatest number of development projects of all the Secondary Plan areas (449). Collectively, these projects propose 150,552 residential units and account for 35% of all proposed residential units in the city. The area also contains nearly 4,637,160 m^2 of non-residential GFA accounting for 38% of all proposed non-residential GFA in the city and three quarters of all proposed non-residential GFA in Secondary Plan areas.

Table 10a: Proposed Development by Secondary Plan Area

Geography	Number of Projects	%	Proposed Residential Units	%	Proposed Non-Residential GFA (m²)	%
City of Toronto	**2,112**	**100.0**	**435,069**	**100.0**	**12,085,148**	**100.0**
Secondary Plans	***853***	***40.4***	***262,852***	***60.4***	***6,201,455***	***51.3***
Agincourt	9	***1.1***	10,360	3.9	82,203	1.3
Central Don Mills	6	0.7	2,367	0.9	38,336	0.6
Central Finch	19	2.2	464	0.2	2,470	0.0
Central Waterfront	51	6.0	26,202	10.0	824,920	13.3
Davenport Village	3	0.4	1,104	0.4	362	0.0
Downsview Area	7	0.8	166	0.1	78,053	1.3
Downtown Plan	449	52.6	150,552	57.3	4,637,160	74.8
Emery Village	4	0.5	1,612	0.6	2,688	0.0
Etobicoke Centre	20	2.3	8,445	3.2	49,164	0.8
Fort York Neighbourhood	5	0.6	2,096	0.8	23,655	0.4
Garrison Common North	42	4.9	9,916	3.8	254,569	4.1
Highland Creek	14	1.6	755	0.3	54,289	0.9
King-Parliament	43	5.0	16,370	6.2	339,219	5.5
King-Spadina	85	10.0	26,364	10.0	700,270	11.3
Lawrence-Allen	16	1.9	4,532	1.7	218,760	3.5
Mimico-by-the-Lake	1	0.1	132	0.1	362	0.0
Morningside Heights	4	0.5	74	0.0	34,184	0.6
Motel Strip	8	0.9	5,199	2.0	24,883	0.4
North York Centre	33	3.9	9,468	3.6	126,670	2.0
Port Union Village Community	0	0.0	0	0.0	0	0.0
Queen River	6	0.7	1,872	0.7	10,013	0.2
Railway Lands Central	3	0.4	4,855	1.8	435,088	7.0
Railway Lands East	7	0.8	2,049	0.8	471,157	7.6
Railway Lands West	3	0.4	1,568	0.6	17,768	0.3
Regent Park	7	0.8	5,966	2.3	21,586	0.3
Scarborough Centre	11	1.3	11,985	4.6	63,321	1.0
Sheppard Avenue Commercial Area	15	1.8	511	0.2	9,839	0.2
Sheppard East Subway Corridor	41	4.8	14,068	5.4	121,669	2.0
Sheppard West/Dublin	11	1.3	922	0.4	8,047	0.1
Swansea	9	1.1	1,344	0.5	10,062	0.2
University of Toronto	20	2.3	1,820	0.7	125,203	2.0
Warden Woods	6	0.7	1,031	0.4	9,481	0.2
Yonge-Eglinton [4]	79	9.3	20,581	7.8	148,918	2.4
Yonge St. Clair	19	2.2	3,751	1.4	54,159	0.9
York University	10	1.2	872	0.3	63,857	1.0

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

1: Development projects with activity between January 1, 2015 and December 31, 2019. 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.

2: 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.

3: The sum of each column may not add up to the totals of all the Secondary Plans because of the overlapping boundaries of various Secondary Plans. The same project may appear in more than one Secondary Plan.

4: Revised Yonge Eglinton Secondary Plan geography shown on Map 6 has been approved by City Council and, since the How Does the City Grow? Update 2019 publication, has been approved by the Minister of Municipal Affairs and Housing.

Secondary Plan Areas within the Downtown Plan Area

The Downtown Plan area overlaps several other Secondary Plan areas. The Central Waterfront Secondary Plan area contains the largest amount of non-residential GFA after the Downtown Plan area as a whole, with 824,920 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.

The Railway Lands East Secondary Plan is also undergoing significant non-residential development with 471,157 m^2 of non-residential GFA proposed. The area for this Secondary Plan is located between John Street and Yonge Street, Front Street West, and the Gardiner Expressway. The Secondary Plan requires that new development be mixed-use and satisfy a broad range of commercial, residential, institutional, cultural, recreational, and open space needs.[6]

Secondary Plan Areas Outside Downtown and Central Waterfront

The newly adopted Yonge-Eglinton Secondary Plan area changes the previous Secondary Plan boundary, resulting in a 9% smaller geography.[7] This Secondary Plan was approved by the Minister of Municipal Affairs and Housing on June 5, 2019. Despite this reduced area, the Yonge-Eglinton Secondary Plan contains the third most development projects (79) outside of the Downtown Plan area and the King-Spadina area, accounting for 20,581 proposed residential units and 148,918 m^2 of non-residential GFA. The Yonge-Eglinton Secondary Plan area accounts for 8% of proposed residential units within all Secondary Plan areas. The King-Spadina Secondary Plan is addressed later in regards to heritage conservation.

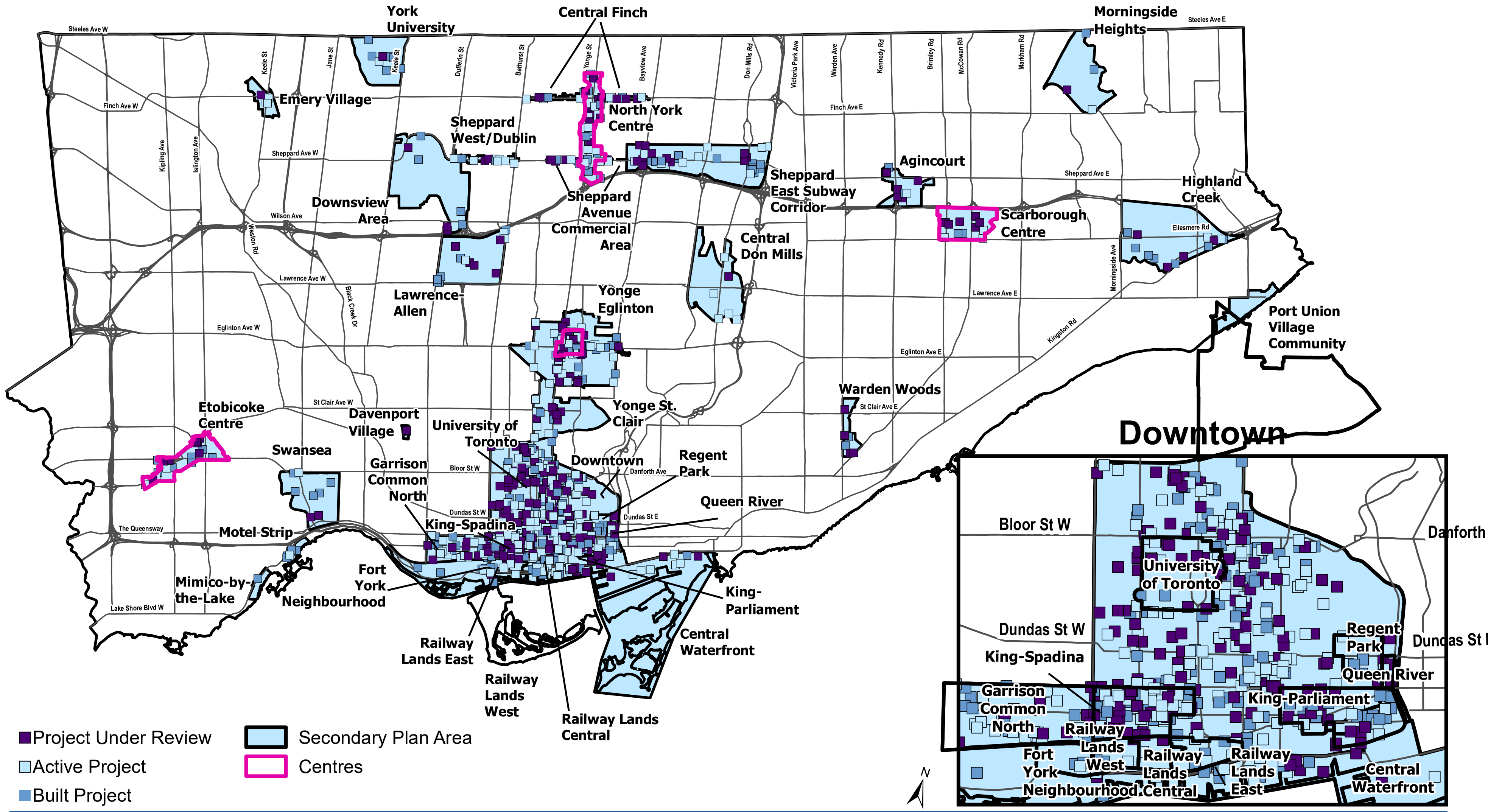
Table 10b: Proposed Development in Secondary Plan Areas by Status

	Number of Projects	%	Proposed Residential Units	%	Proposed Non-Residential GFA (m^2)	%
City of Toronto	**2,112**	**100.0**	**435,069**	**100.0**	**12,085,148**	**100.0**
Secondary Plans	***853***	***40.4***	***262,852***	***60.4***	***6,201,455***	***51.3***
Built	272	31.9	71,116	27.1	1,419,225	22.9
Active (approved but not yet built)	292	34.2	98,599	37.5	2,217,042	35.8
Under Review (not approved)	289	33.9	93,137	35.4	2,565,188	41.4

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

Development projects with activity between January 1, 2015 and December 31, 2019. 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.

Map 5: Secondary Plan Areas



Source: Land Use Information System II

Development projects with activity between January 1, 2015 and December 31, 2019. 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, Planning Research and Analytics - October 2020

Published: October 2020.