

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, 2017 and June 30, 2022. Special topics include the Growth Plan forecasts, purpose built rental unit analysis, and the inclusion of final Planning approvals. Available from <https://www.toronto.ca/city-government/data-research-maps/research-reports/planning-development/>



Development Pipeline 2022 Q2

Highlights

717,327 residential units and 14,484,961 square metres of non-residential gross floor area (GFA) were proposed, representing all projects with development activity between January 1, 2017 and June 30, 2022

There are 167,599 more residential units and 1,096,666 square metres more non-residential GFA in the five-year pipeline window to 2021 compared to the 2020 Q4 Pipeline

There are 613,689 residential units that are either Under Review or Active. If all of these proposed residential units were eventually approved and built, the total number of dwellings in the city would increase by over one half

In total, the Development Pipeline could represent a potential population of 1,213,000 people. This would be the equivalent of growing Toronto's population by over 40%

As of June 30th, City Planning had already approved more units in 2022 than in the whole year prior

Considering only projects which have received a Notice of Approval Conditions (NOAC) for a Site Plan Control application, the City approved an average of 22,823 residential units per year between 2017 and 2021; an additional 6,840 residential units on average or a total of 143% of the average annual production through the Pipeline

City Council approved an average of 29,726 residential units per year between 2017 and 2021, while 15,983 units on average were built annually.

City Council approved an average of 22,823 residential units per year on projects that have received a Notice of Approval Conditions on their Site Plan Control applications between 2017 and 2021. This is 143% of the average annual number of units built.

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 bulletin examines how and where the city has been growing over the past five and a half years, and offers insight on how the city will continue to develop in the near future.

Toronto's Official Plan is the guide for development in the city over the next 30 years. The Official Plan came into force 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. While gradual intensification occurs across the city, its central purpose is to direct growth to appropriate areas. The locations recognized for residential and employment growth are those identified in the Official Plan's Urban Structure Map as Avenues, Centres and Downtown, the Central Waterfront, as well as other areas in the city designated as Mixed Use Areas and Employment Areas. While not part of the Urban Structure Secondary Plans provide the opportunity for guiding intensification across the City. These areas are also those that historically are well integrated and serviced by infrastructure, transit and other community services

and facilities. The Official Plan's Urban Structure Map is included in this bulletin as Map 1 on page 2. The Official Plan is currently under review, as provincially legislated to achieve conformity with the Growth Plan (2019). The Official Plan review process presents an opportunity to address, through planning policy, a number of the growth-related challenges facing Toronto today and in the future and as is occurring via a review of the intensification strategy.

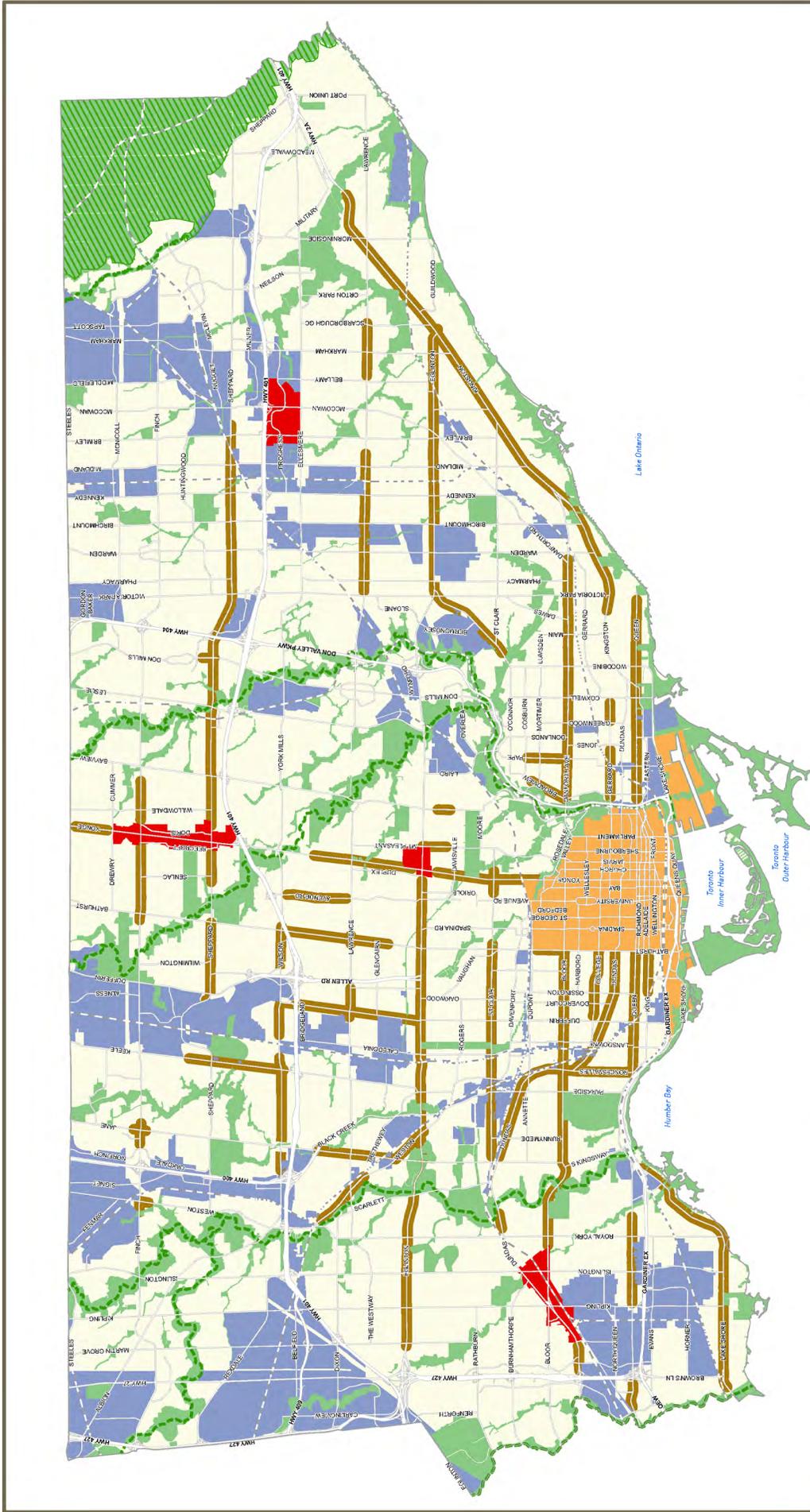
While the Official Plan guides development across the city, there is also a suite of existing and emerging policies that influence development, such as the Expanding Housing Options in Neighbourhoods (EHON) policy framework, an initiative to facilitate more low-rise housing in residential neighbourhoods to meet the needs of our growing city. EHON and other programs and policies are listed on pages 61 and 62.

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 in the five-and-a-half-year window between January 1, 2017 and June 30, 2022, referred to as the 2022 Q2 Pipeline. This provides a lens

Map 1: Official Plan Urban Structure Map



Toronto Official Plan

Map 2

Urban Structure

February 2019

- Green Space System
- Greenbelt Protected Countryside
- Greenbelt River Valley Connections

- Avenues
- Centres
- Employment Areas
- Downtown and Central Waterfront



through which to monitor Toronto's near-term housing supply which in turn provides an extensive representation of development activity within the city. Figures are provided in the Appendix for the 2021 Pipeline, the five-year window between January 1, 2017 and December 31, 2021, in order to provide more appropriate comparisons to previous Pipeline Development Bulletins.

A development project is the collection of Planning and Building Permit Applications having to do with a single site. Development activity refers to progress at any stage of the approvals and development processes, including: Planning application submission, review and approval; Building Permit application and issuance, construction,

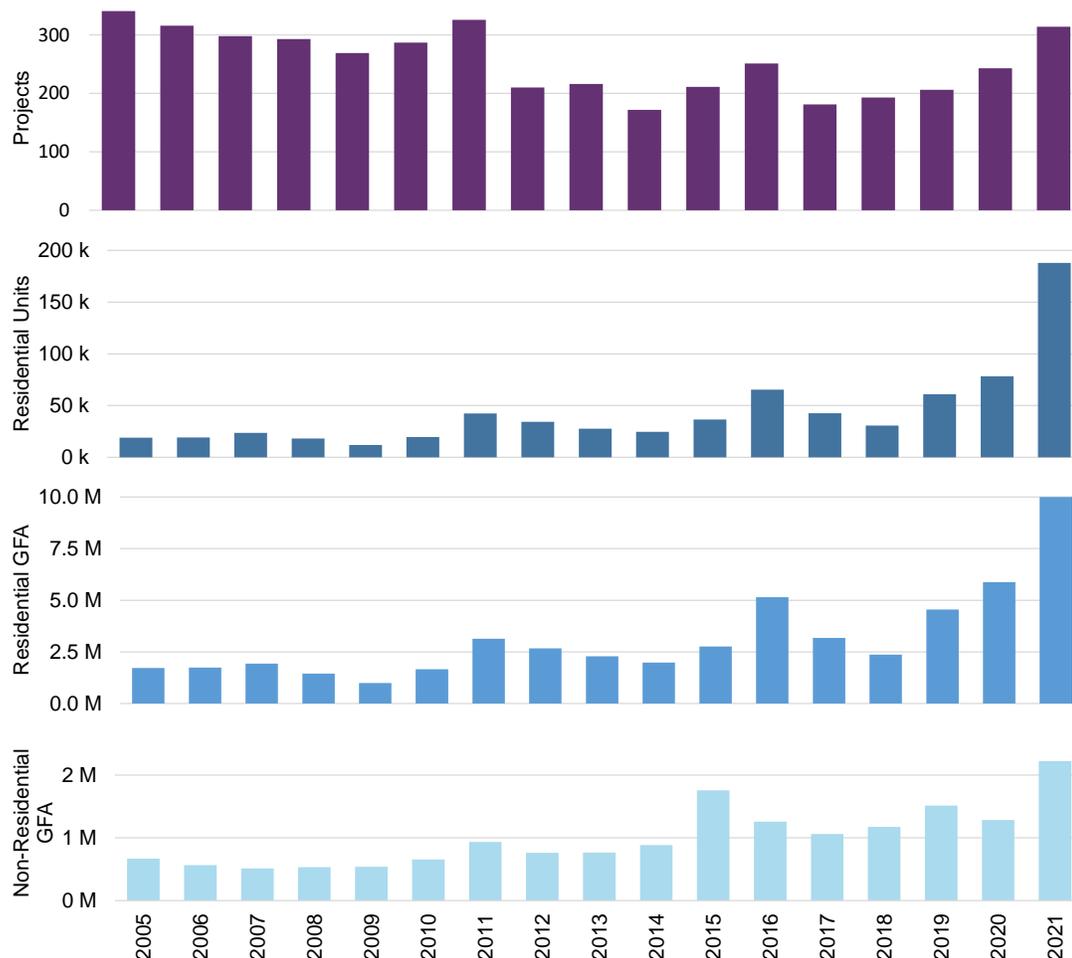
occupancy, and completion. As-of-right construction, or development below the Site Plan Control threshold, is not captured by the Development Pipeline.

Projects are categorized into three general statuses, based on the stage of the development approvals and construction activity they reached between January 1, 2017 and June 30, 2022.

- 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.

Figure 1: Projects, Residential Units, and GFA by Application Intake Year, 2005 to 2021



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

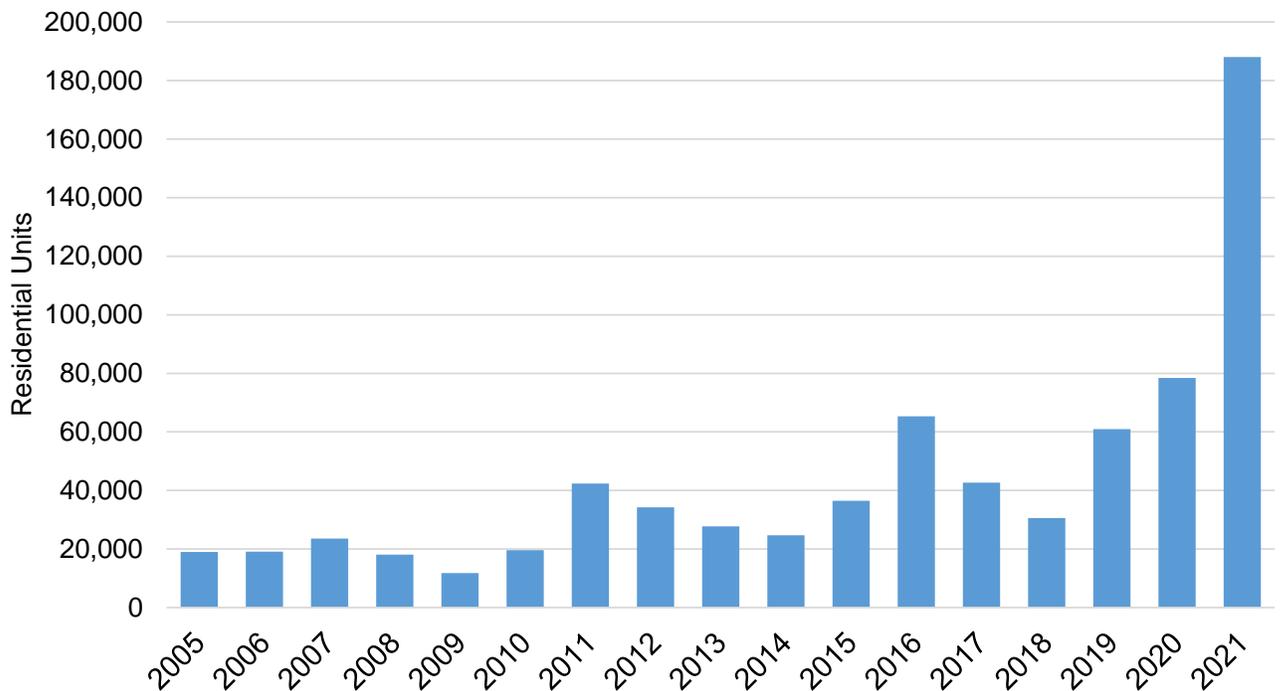
Development projects submitted each year from 2005 to 2021, and the total number of residential units, residential GFA, and non-residential GFA proposed. Residential and non-residential GFA is in square metres.

Under Review projects are those which have not yet been approved or refused, and those which are under appeal.

Over time projects have become larger and more complex and subsequently require a longer review and construction process. Looking at all projects submitted between 2005 and 2021, it is clear that while the overall number of projects has not increased since 2005, the number of residential units proposed and the overall Gross Floor Area (GFA) of projects have increased substantially (see Figures 1 and 2). The number of residential units proposed in 2021 is more than double the number of units proposed in 2020, the year with the second largest amount of proposed residential units since 2005. The large increase in 2021 is in part due to a surge of applications in the fourth quarter prior to the anticipated implementation of Inclusionary Zoning in 2022.

Complex projects have been split into phases so that the different parts of a project can be tracked at different stages of development as they are submitted. This has enabled each phase to be reflected in the Pipeline until that phase is either built or becomes inactive. These phases often correspond with Site Plan Control applications relating to the locations of proposed buildings and site-specific details. Pipeline tracking distinguishes between any existing buildings, uses and residential units that may be retained on the site from previous development, and the new buildings, uses and residential units proposed to be added to the site. The Pipeline in this bulletin reports on newly proposed uses, units and spaces.

Figure 2: Proposed Residential Units, 2005 to 2021



Source: City of Toronto, City Planning: Land Use Information System II
Development projects submitted each year from 2005 to 2021.

The Development Pipeline January 1, 2017 – June 30, 2022

Toronto continues to experience strong growth and development activity (see Maps 2 and 3 on pages 6 and 7). The five-and-a-half year 2022 Q2 Development Pipeline is comprised of 2,413 development projects (see Table 1). Cumulatively, these projects propose a record 717,327 residential units and 14,484,961 m² of non-residential gross floor area (GFA) (see Tables 2 and 3 on page 8).

The five-year window to 2021 contains 670,961 proposed residential units, a large increase of 167,599 proposed units over the 2020 Pipeline total of 503,362 proposed units. See Appendix Tables A.1 to A.3 for the 5-year figures, which consists of all development projects in the City of Toronto with any development activity in the five-year window, between January 1, 2017 and December 31, 2021.

Between the 2020 Pipeline and the 2021 Pipeline, the absolute number of projects increased by 167, 93% (156 projects) of which were proposed within growth management areas, including 74 new projects along the Avenues. Within the first two quarters of 2022, 132 projects were received, 41 of which were proposed along the Avenues. The concentration of projects proposed within the growth management areas of the City has increased slightly since the 2020 Pipeline.

The absolute growth and share of total growth of proposed residential units has increased most substantially since the 2020 Pipeline in areas outside of the growth management areas (108% and 6.3%, respectively), with the lowest absolute growth and share of total growth experienced in Downtown and Central Waterfront (14% and -6.4%, respectively). The number of residential units proposed outside of growth management areas has more than doubled since the 2020 Pipeline. About 60% of this increase is due to the proposed redevelopment of the Downsview Airport lands. Taken together, this indicates a dispersion

of growth from the city centre to the other parts of the city, including Downsview and areas designated as either Apartment Neighbourhoods or Neighbourhoods. The development activity in Neighbourhoods provides a positive indication of the potential impact of the City's Expanding Housing Options in Neighbourhoods initiatives (details of which are discussed further in this Bulletin).

Between the 2020 Pipeline and the 2022 Q2 Pipeline, the absolute non-residential GFA proposed throughout the city increased by over 1.6 million square metres, an increase of 13%. Proposed non-residential GFA has increased at over twice the overall rate in areas outside of the growth management areas. While much of the increase was proposed within the Downsview lands or within Employment Areas, it is evident that non-residential development activity is becoming more distributed throughout the city. The Centres, Avenues and other Mixed Use areas generally maintained their share of proposed non-residential development since 2020.

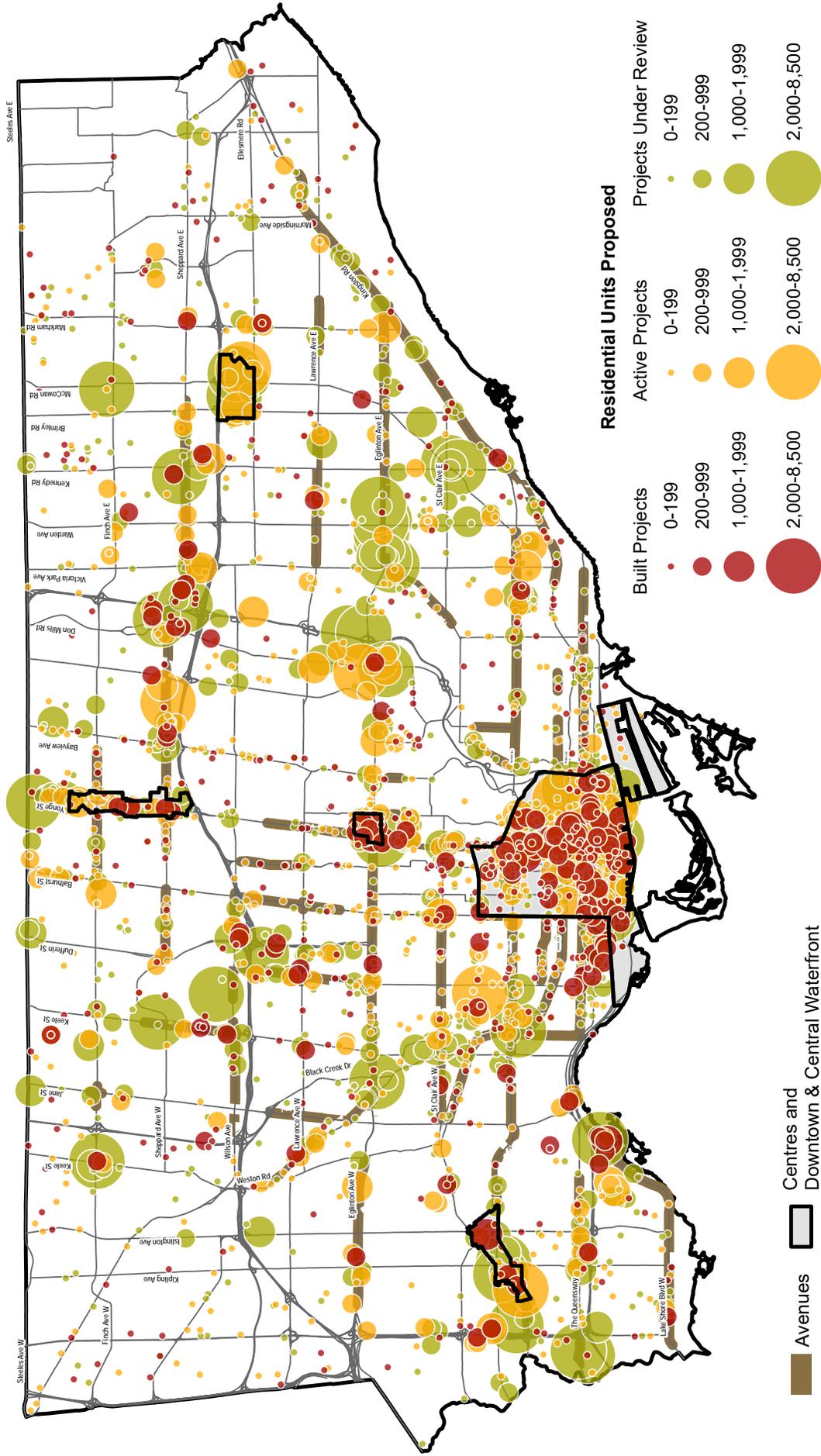
Table 1: Proposed Projects in City of Toronto by Status

	Built	Active	Under Review	Total in Pipeline	% of Total	% of Growth Areas
City of Toronto	622	879	912	2,413	100.0%	
Growth Areas	394	549	605	1,548	64.1%	100.0%
Downtown and Central Waterfront	142	205	179	526	21.7%	31.5%
Centres	30	48	47	125	5.2%	14.5%
Avenues	149	209	279	637	26.4%	28.3%
Other Mixed Use Areas	73	87	100	260	10.8%	25.6%
All Other Areas	228	330	307	865	35.9%	

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

Development projects with activity between January 1, 2017 and June 30, 2022. 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: Proposed Residential Development

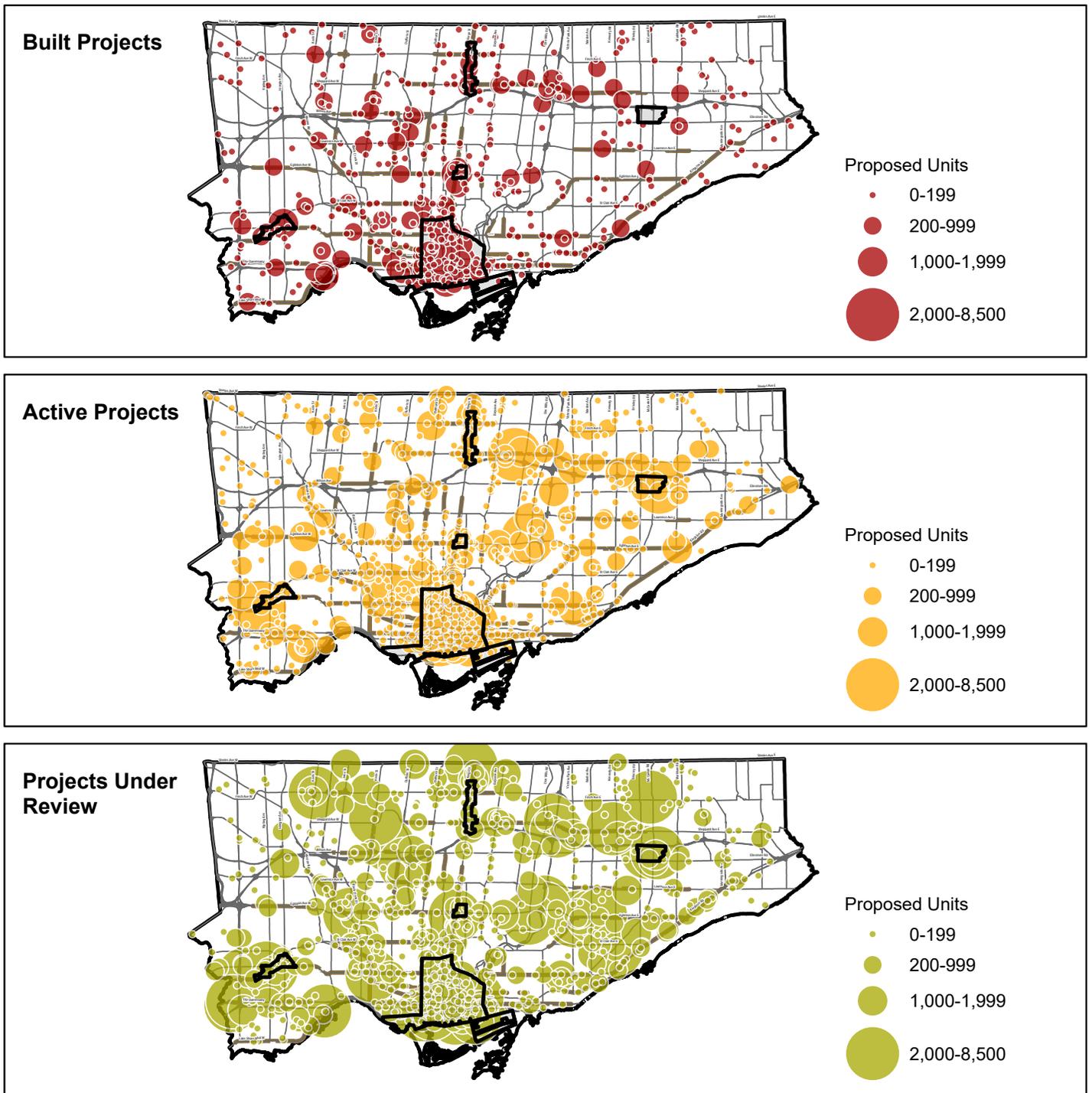


Source: Land Use Information System II
 Development projects with activity between January 1, 2017 and June 30, 2022. Built projects are those which became ready for occupancy and/or were completed. Active projects are those which have been approved, for which Building Permits have been applied or have 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.

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Map 3: Residential Development by Status



Source: Land Use Information System II
 Development projects with activity between January 1, 2017 and June 30, 2022. 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.

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 Avenues 
 Centres and Downtown & Central Waterfront 

The Development Pipeline tracks and reports on project elements that are newly proposed and existing elements that will be retained. Out of a total of over 760,000 units in development proposals, over 94% of the total residential units are proposed while the remainder are retained from the previous uses, with a total of 717,327

new units being proposed (see Table 4a). While out of the total 21,819,749 m² non-residential GFA in development proposals, 66% (14,484,961 m²) of the total non-residential GFA is newly proposed and the remaining proportion is retained from previous uses (see Table 4b).

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

	Built	Active	Under Review	Total in Pipeline	% of Total	% of Growth Areas
City of Toronto	103,638	203,793	409,896	717,327	100.0%	
Growth Areas	92,249	177,296	303,755	573,300	79.9%	100.0%
Downtown and Central Waterfront	43,513	65,734	71,405	180,652	25.2%	31.5%
Centres	10,891	26,669	45,833	83,393	11.6%	14.5%
Avenues	22,848	40,940	98,440	162,228	22.6%	28.3%
Other Mixed Use Areas	14,997	43,953	88,077	147,027	20.5%	25.6%
All Other Areas	11,389	26,497	106,141	144,027	20.1%	

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

Proposed residential units in development projects with activity between January 1, 2017 and June 30, 2022. 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	% of Growth Areas
City of Toronto	3,087,319	5,483,875	5,913,767	14,484,961	100.0%	
Growth Areas	1,951,704	2,861,562	3,176,948	7,990,215	55.2%	100.0%
Downtown and Central Waterfront	1,493,950	1,988,233	1,401,996	4,884,178	33.7%	61.1%
Centres	52,390	230,254	254,004	536,647	3.7%	6.7%
Avenues	209,078	294,514	681,753	1,185,345	8.2%	14.8%
Other Mixed Use Areas	196,286	348,562	839,196	1,384,044	9.6%	17.3%
All Other Areas	1,135,615	2,622,313	2,736,819	6,494,747	44.8%	

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

Proposed non-residential GFA in development projects with activity between January 1, 2017 and June 30, 2022. 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.

In order to realize these proposed residential units, existing residential units may be demolished. The number of “net new” proposed units, which are the proposed units less the units demolished to realize them, can be estimated using Demolition Permits issued by the Toronto Building Division. Based on Demolition Permits in the City of Toronto over the past 16 years from 2005 to 2020, the overall average rate of demolition versus housing units started is 7.8% and the demolition rate is 8.9% of the units completed over the same period, as reported by Canada Mortgage and Housing Corporation (CMHC). Using the demolition rate of 8.9%, the Development Pipeline contains an estimated 653,485 net new residential units and 46,545,883 m²

of net new residential GFA (see table 4c). This is a conservative estimate of the net new housing supply if the Development Pipeline were realized.

The majority of the Demolition Permits issued were for the teardown and replacement of single houses or were associated with lot severances. As-of-right construction, or development below the Site Plan Control threshold, does not require a Site Plan Control application and is not captured by the Development Pipeline. To apply the overall average demolition rate to the Pipeline will significantly overestimate the units that would need to be demolished to realize the housing potential in the Pipeline.

Table 4a: Proposed, Retained and Total Units and GFA

	Retained	Proposed	Total	Proposed %
Units	42,837	717,327	760,164	94.4%
Residential GFA	3,771,168	51,093,176	54,864,344	93.1%
Non-Residential GFA	7,334,787	14,484,961	21,819,748	66.4%

Table 4b: Proposed, Retained and Total Non-Residential GFA

	Retained	Proposed	Total	Proposed %
Total	7,334,787	14,484,961	21,819,748	66.4%
Under Review	2,097,454	5,913,767	8,011,221	73.8%
Active	2,979,714	5,483,875	8,463,589	64.8%
Built	2,257,619	3,087,319	5,344,938	57.8%

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

Proposed, retained and total residential units, residential GFA and non-residential GFA in development projects with activity between January 1, 2017 and June 30, 2022. 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.

The 2021 Pipeline, which includes projects with activity between January 1, 2017 and December 31, 2021, contained 167,599 more residential units than the 2020 Pipeline, which reported on projects active between January 1, 2016 and December 31, 2020. This is growth of 33% in the near-term housing supply in a single year. The 2021 Pipeline also contains 1,096,666 m² more non-residential GFA or 8.5% more space over the 2020 Pipeline. Meanwhile, the 2021 Pipeline contained only 167 more development projects than the 2020 Pipeline (2,281 versus 2,114), representing an 8% increase (see Tables A.1, A.2 and A.3 in the Appendix for 2021 Pipeline figures). The substantial increase in the number of proposed residential projects in the most recent Pipeline is partially explained by a rush of applications received at the end of 2021

in anticipation of the introduction of the City's Inclusionary Zoning policies (see Figure 3). A strong pace of application submissions continued into the first half of 2022. Nevertheless, the trend is clear that the projects proposed are becoming much larger and more complex. In order to support this prospective growth, City Planning has implemented a variety of initiatives to ensure livable, sustainable, and equitable communities, discussed further in this Bulletin.

Residential projects in growth management areas of the Official Plan are over twice as large on average than those outside of growth management areas (see Table 5), though average project sizes have increased in size throughout the city. While the average size of residential projects in Downtown and the Central Waterfront has grown

Table 4c: Estimated Net Supply of Residential Units and GFA

Average Demolition Rate 8.9%	Residential Units			Residential GFA		
	Proposed	Estimated Demolition	Net New Units	Proposed	Estimated Demolition	Net New GFA
Total	717,327	63,842	653,485	51,093,176	4,547,293	46,545,883
Under Review	409,896	36,481	373,415	27,176,968	2,418,750	24,758,218
Active	203,793	18,138	185,655	15,861,902	1,411,709	14,450,193
Built	103,638	9,224	94,414	8,054,305	716,833	7,337,472

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

Proposed residential unit and residential GFA in development projects with activity between January 1, 2017 and June 30, 2022. 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. Citywide demolition rate is based on Demolition Permits issued 2005-2020 versus CMHC Completions over the same period. Gross floor area values are expressed in square metres.

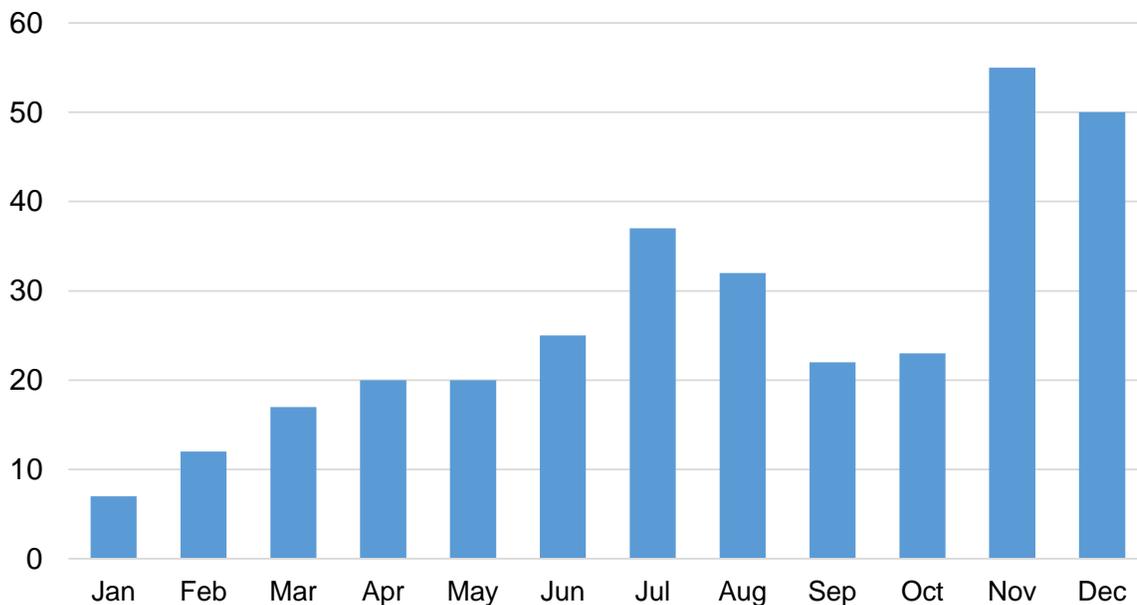
only slightly in comparison to the 2020 Development Pipeline, projects in the Centres, along the Avenues and in other Mixed Use Areas have grown by a range of 23 to 171 units on average across the different types of growth management areas. This indicates a dispersal of larger projects and an increase in overall project size to more areas of the city.

The size of projects has grown dramatically over time. Active residential projects are 39% larger than those recently built, while projects Under Review are on average more than double the size of those recently completed. A comparison of projects received between January 1, 2021 and June 30, 2022 to the previous 2020 Pipeline indicates that new projects are continuing to increase in scale. Residential projects in growth management areas are 57% larger on

average, with the size of residential projects having grown by a range of 84 to 735 units on average across the different types of growth management areas, including in Downtown and the Central Waterfront.

The average amount of non-residential GFA in Under Review and Active projects is over 25% greater than in Built projects. However, the change in average non-residential GFA per project varies across different areas of the city. The average non-residential GFA per project has only increased in the Centres (7%) and in areas outside of the growth management areas (18%), and has decreased by a range of -11% to -13% in the other growth management areas (see Table 5). This provides further evidence of the increasing dispersion of growth throughout the city, including to Secondary Plan areas.

Figure 3: Number of Proposed Projects in 2021



Source: City of Toronto, City Planning: Land Use Information System II
Development projects submitted between January 1, 2021 and December 31, 2021

Built Projects

Many projects with development activity between 2017 and June 30, 2022 have become occupied or have completed construction during this period. In the current Pipeline, 622 projects (26% of the total) have completed construction or received a Partial Occupancy Permit. These projects represent an addition of 103,638 newly constructed residential units to the city's housing supply and 3,087,319 m² of non-residential GFA (see Tables 1 and 2 on pages 5 and 8).

Active Projects

In the current Pipeline, 36% of projects are active with at least one Planning approval, accounting for 203,793 residential units and 5,483,875 m² of non-residential GFA. Residential projects that are approved but not yet built represent over 12 years of potential housing supply, given the average annual pace of completions reported by CMHC (see Table 6). At any given time, there are active residential projects at different stages of development from an initial approval to the beginning of construction.

Table 5: Average Project Size by Status

<i>Average Number of Residential Units per Project</i>						
Units	Built	Active	Under Review	Total in Pipeline	Received Jan 1, 2021 - June 30, 2022	2020 Q4
City of Toronto	167	232	449	297	521	238
Growth Areas	234	323	502	370	517	329
Downtown and Central Waterfront	306	321	399	343	465	340
Centres	363	556	975	667	1,231	496
Avenues	153	196	353	255	315	232
Other Mixed Use Areas	205	505	881	565	908	454
All Other Areas	50	80	346	167	528	87
<i>Average Non-Residential Gross Floor Area per Project</i>						
GFA	Built	Active	Under Review	Total in Pipeline	Received Jan 1, 2021 - June 30, 2022	2020 Q4
City of Toronto	4,964	6,239	6,484	6,003	6,161	6,080
Growth Areas	4,954	5,212	5,251	5,162	3,275	5,907
Downtown and Central Waterfront	10,521	9,699	7,832	9,286	5,430	10,440
Centres	1,746	4,797	5,404	4,293	4,852	4,004
Avenues	1,403	1,409	2,444	1,861	1,528	2,145
Other Mixed Use Areas	2,689	4,006	8,392	5,323	3,617	6,112
All Other Areas	4,981	7,946	8,915	7,508	11,155	6,368

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

Proposed residential units and non-residential GFA in development projects with activity between January 1, 2017 and June 30, 2022. 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.

Projects under Review

In the current Pipeline, there are 409,896 residential units and an additional 5,913,767 m² of non-residential GFA in projects currently under review. The share of projects, proposed residential units, and non-residential GFA that are Under Review have all increased since the 2020 Pipeline Bulletin, representing an increase in development proposals partially explained by the rush of applications near the end of 2021, which were submitted to meet the transition policies of the Inclusionary Zoning (IZ) policies. Figure 4a displays these units by status, showing that 57% of all proposed residential units

are currently under review and Figure 4b shows that 41% of all proposed non-residential GFA 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 613,689 residential units and 11,397,642 m² 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 proposed residential units were eventually approved and built, the total number of dwellings in the city would increase by over one half.

Table 6: Dwelling Completions, Greater Toronto Area

Year	Toronto Annual Average	Toronto Total	GTA Total	Toronto % of GTA
1992 - 1996	5,302	26,511	104,228	25.4%
1997 - 2001	6,615	33,076	161,592	20.5%
2002 - 2006	12,967	64,834	220,878	29.4%
2007 - 2011	12,529	62,647	171,900	36.4%
2012 - 2016	16,869	84,343	181,630	46.4%
2017 - 2021	16,479	82,396	180,033	45.8%
January 1, 2022 - June 30, 2022	-	7,721	15,454	50.0%
Total	-	361,528	1,035,715	34.9%
30-Year Annual Average 1992 - 2021	11,794		33,958	34.7%
10-year Annual Average 2012 - 2021	16,674		35,916	46.4%

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

Note: Completions are for whole calendar years except for 2022.

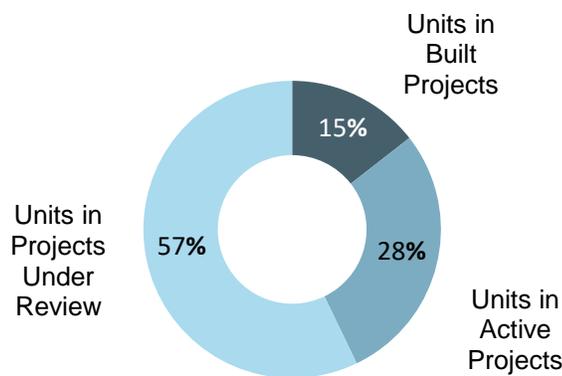
Dwelling Unit Completions and Absorptions

The City of Toronto continues to be an exceptionally attractive location for residential development in the Greater Toronto Area (GTA). According to CMHC, since 1992, Toronto represents just over one third of the housing completions in the GTA (35%, see Table 6 on page 13). Toronto's share of GTA completions has been increasing steadily over the last decade, accounting for an average of 46% since 2012. This shows that there continues to be strong housing growth in the city compared to the region. Despite disruptions from the COVID-19 pandemic, 20,270 units were completed in 2021, the highest since 2015, representing an increase of 17% compared to 2020 (see Table 7 on page 15). Over the last five years, unit completions in Toronto have averaged

16,674 units per year. On average, 10% of the units built per year are ground-related, made up of 1,073 single detached houses (6%), 119 semi-detached houses (1%), and 468 row or townhouses (3%) per annum, while 90% or 15,014 units are apartments and other dwelling types (see Table A.5 in the Appendix). The unabsorbed percentage of completed dwellings has remained small in Toronto, regardless of the tenure of the unit (see Table A.7 in the Appendix).

High-density condominium apartments continue to dominate the new construction landscape in Toronto. An average of 13,267 units of the total built units since 2012 are Condominium units (80%, see Table A.6 in the Appendix). Between 2017 and 2021, CMHC recorded 82,396 total residential units completed in Toronto, 76% of which were condominium apartments.¹

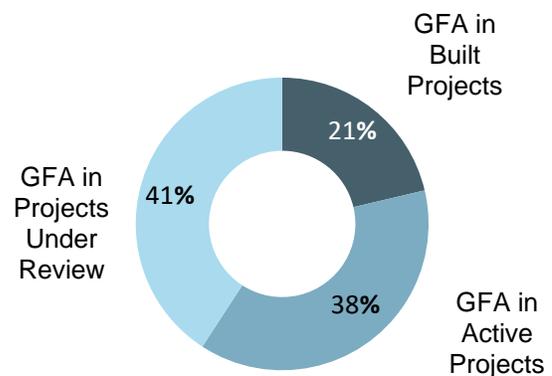
Figure 4a: Residential Units by Status



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

Proposed residential units in development projects with activity between January 1, 2017 and June 30, 2022. 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 4b: Non-Residential GFA by Status



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

Proposed non-residential GFA in development projects with activity between January 1, 2017 and June 30, 2022. 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.

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 compares the number of completions and absorptions in Toronto over the last 15 years. The average percentage of unabsorbed units decreased slightly from 5% in the 2007 to 2011 period to 3% from 2012 to 2016, and has continued to decrease to 1% for the 2017 to 2021 period.

The Market Absorption Survey demonstrates that the bulk of the unabsorbed units are in the purpose-built rental market. From 2017-2021, purpose-

built rental completions represented 15% of total completions, but only 13% of total absorptions (see Table A.7 in the Appendix). The higher rate of unabsorbed rental units, as seen in Table A.6, is not the result of an oversupply of this type of unit. The methodology of the Market Absorption Survey with regards to purpose-built rental 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 7: Dwelling Unit Completions and Absorptions, City of Toronto

Year	Completions	Absorptions	Net Completions	"Unabsorbed" Percentage
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%
2020	17,276	17,063	213	1.2%
2021	20,270	19,938	332	1.7%
Total	229,386	222,642	6,744	3.0%
2007 - 2021	15,292	14,843	450	3.0%
2007-2011 Average	12,529	11,937	593	5.0%
2012-2016 Average	16,869	16,315	553	3.4%
2017-2021 Average	16,479	16,276	203	1.2%

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, 2022 year-to-date data has been excluded.

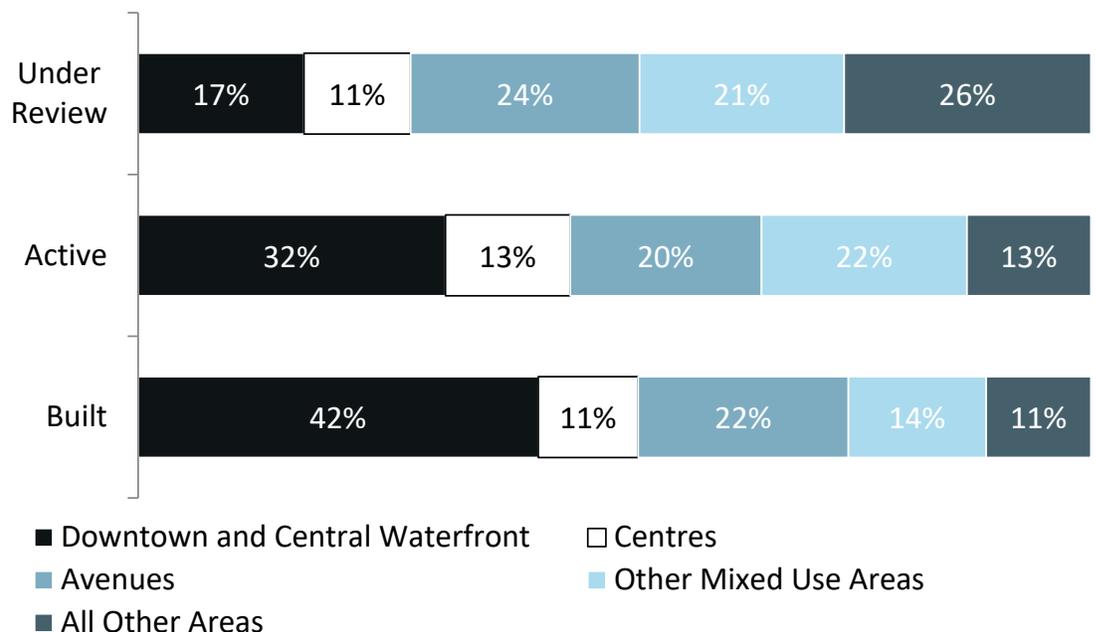
Note 2: "Unabsorbed Percentage" is the ratio of Completions minus Absorptions to Absorptions.

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 appropriate intensification within this structure and sets out policies for the management of change through the integration of land use and transportation. Some areas of the city identified for intensification 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 public and private sectors work together and act as stewards of the city, leading Toronto to be a place where housing choices are available for all

people in their communities at all stages of their lives. The 2022 Q2 Development Pipeline and the 2021 Development Pipeline show that 80% of residential units and 55% of non-residential development is proposed in areas currently targeted for growth by the City's Official Plan, including Downtown and the Central Waterfront, the Centres, the Avenues, and other Mixed Use Areas (see Tables 2, 3, A.2, and A.3). These figures represent a decrease compared to the 2020 Development Pipeline, in which 86% of residential units and 61% of non-residential GFA was proposed in areas targeted for growth. Figures 5 and 6 breakdown the proportion of proposed residential units and non-residential GFA by Pipeline status, and show the increasing amount of development proposed outside of the City's Growth Areas.

Figure 5: Proposed Residential Units in Growth Areas by Status



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

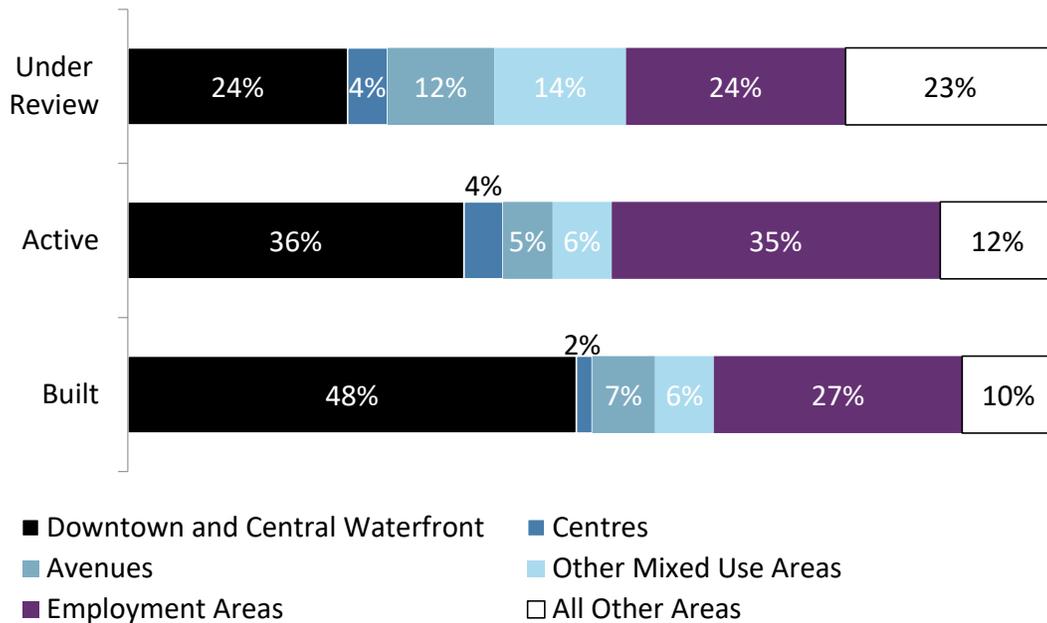
Proposed residential units in development projects with activity between January 1, 2017 and June 30, 2022. Built projects are those which became ready for occupancy and/or were completed. Active projects are those which have been approved, for which Building Permits have been applied or have been issued, 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.

Downtown and Central Waterfront

The Downtown and Central Waterfront area is one of the most prominent locations for development activity across the city, containing the largest number of proposed residential units and the most proposed non-residential GFA of any growth management area. In the 2022 Q2 Development Pipeline, there are 180,652 proposed new units and 4,884,178 m² of proposed non-residential GFA within the Downtown and Central Waterfront area. This comprises 25% of the total proposed residential units and 34% of the non-residential GFA proposed in the entire city (see Tables 2 and 3 on page 8), notable given that Downtown and Central Waterfront only make up 3% of the city's land area.

Map 4 (on page 18) 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. With an increase of project proposals south of Queen Street to the west of University Avenue and east of Yonge Street, more development proposals are moving closer to the boundaries of the Downtown area.

Figure 6: Proposed Non-Residential Gross Floor Area in Growth Areas by Status

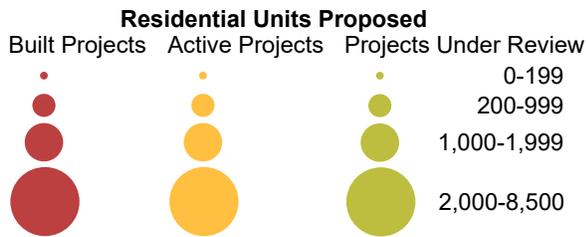
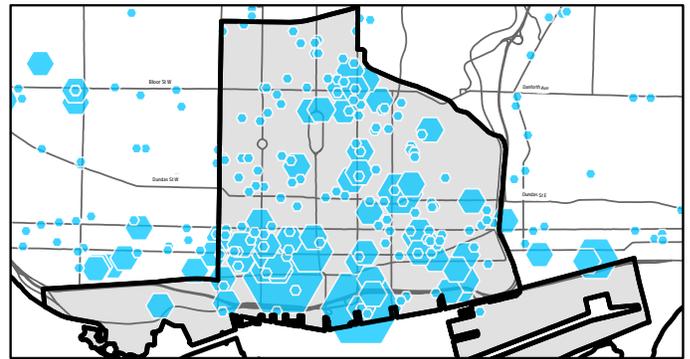
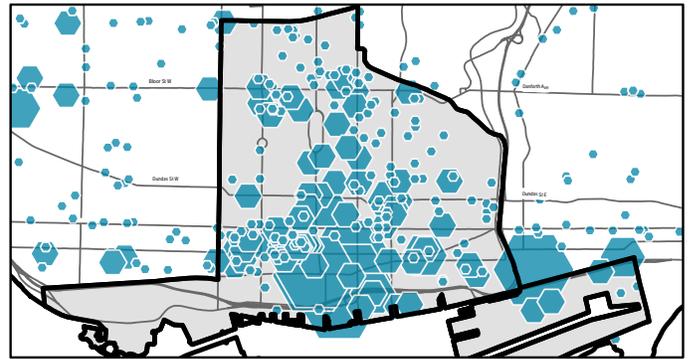
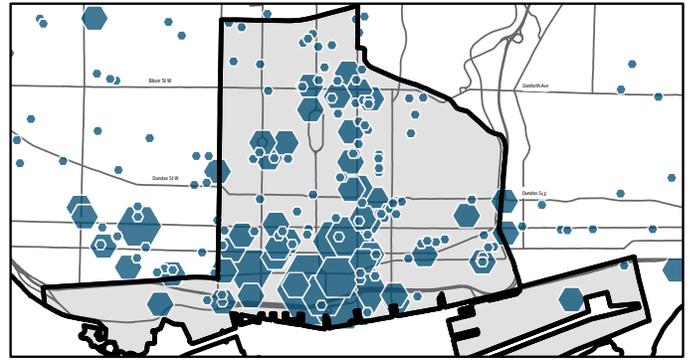


Source: City of Toronto, City Planning: Land Use Information System II

Proposed non-residential GFA in development projects with activity between January 1, 2017 and June 30, 2022. 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 4: Downtown and Central Waterfront Development Activity



Source: Land Use Information System II

Development projects with activity between January 1, 2017 and June 30, 2022. 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.

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Avenues

Centres and Downtown & Central Waterfront

Large-scale residential projects are becoming more common in the Downtown and Central Waterfront area. The proposed projects in Downtown with 1,000 residential units or more are listed in Table 8 (page 20). There are 30 projects in this area of the city that meet this threshold, half of which are under review. One example is the Alexandra Park redevelopment at 571 Dundas St W, which features a unique partnership between Toronto Community Housing, private development partners and an independent housing co-operative, and will see the revitalization of existing social housing stock and the addition of new housing and amenities. Once completed, Alexandra Park will include new retail, community spaces, services, and infrastructure within a more mixed-income and mixed-use neighbourhood. Another example is The Well, occupying a 3.07 hectare site located at Front Street and Spadina Avenue. With direct access to public transit, the project is proposing close to 1,700 residential units and a mix of office and retail uses across seven buildings and five phases of development, enabling residents and local employees to access a range of new and existing amenities in the area.

A notable amount of non-residential activity is also occurring in Downtown. In the current Pipeline, there are nine large projects each proposing over 100,000 m² of non-residential GFA in the Downtown and Central Waterfront area, accounting for half of the projects that are proposing 100,000 m² of non-residential GFA or greater in the city (see Table 14 on page 39). Many of the largest projects with non-residential components are mixed-use projects that incorporate housing. While most of the major projects within Downtown are predominately office space, there are a few proposed projects with other types of non-residential uses in Downtown including:

- A mixed-use building at 171 Front St W that proposes a live performance venue in addition to office and retail space; and

- The proposed 1 Yonge St development (Phases 4 and 5) that features the inclusion of a hotel, located close to public transit and with direct access to the PATH system.

These projects are in addition to seven other large development projects in Downtown, which together propose 1,283,398 m² of non-residential GFA.

Map 4 also shows a strong north-south trend of recently built non-residential development activity along Yonge Street, with the largest built projects located to the south of Queen Street. 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 Street.¹ 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.

1 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. On July 14, 2021, City Council voted to rename Dundas Street and other civic properties with the Dundas name. A Community Advisory Committee has been formed and staff are planning to report back to Council in 2023 with recommended new names.

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

	Proposed Residential Units		Proposed Residential GFA		Proposed Storeys (Tallest Building)	Proposed Buildings
	#	%	#	%	#	#
Downtown and Central Waterfront	180,652	100.0%	13,560,054	100.0%		
Proposed Residential Units ≥ 1,000	51,880	28.7%	3,826,886	28.2%		
<i>Built Projects</i>	4,639	8.9%	292,038	7.6%		
90 HARBOUR ST	1,426	2.7%	85,924	2.2%	70	3
578 FRONT ST W	1,191	2.3%	76,569	2.0%	20	4
200 DUNDAS ST E	1,020	2.0%	54,085	1.4%	50	1
50 ST JOSEPH ST	1,002	1.9%	75,460	2.0%	56	2
<i>Active Projects</i>	18,001	34.7%	1,481,706	38.7%		
325 GERRARD ST E	2,755	5.3%	266,000	7.0%	29	12
266-270 KING ST W	2,038	3.9%	137,272	3.6%	84	2
571 DUNDAS ST W	1,900	3.7%	199,464	5.2%	21	17
261 QUEENS QUAY E	1,833	3.5%	171,468	4.5%	0	9
55 LAKE SHORE BLVD E (Block 2)	1,670	3.2%	123,846	3.2%	71	2
177 FRONT ST E	1,531	3.0%	107,116	2.8%	29	3
23 SPADINA AVE	1,397	2.7%	102,739	2.7%	72	2
80 BLOOR ST W	1,356	2.6%	103,428	2.7%	72	1
6 GLEN RD	1,339	2.6%	99,693	2.6%	50	4
363 YONGE ST	1,103	2.1%	75,636	2.0%	83	1
37 YORKVILLE AVE	1,079	2.1%	95,044	2.5%	67	1
<i>Projects Under Review</i>	29,240	56.4%	2,053,142	53.7%		
595 FRONT ST W	5,754	11.1%	366,027	9.6%	70	5
55 LAKE SHORE BLVD E (Block 4)	3,076	5.9%	218,065	5.7%	90	2
591 DUNDAS ST E	2,973	5.7%	279,178	7.3%	38	12
429 LAKE SHORE BLVD E	2,280	4.4%	153,960	4.0%	55	13
400 FRONT ST W	2,226	4.3%	142,037	3.7%	63	3
180 DUNDAS ST W	1,889	3.6%	124,580	3.3%	72	1
33 GERRARD ST W	1,709	3.3%	119,763	3.1%	85	4
475 YONGE ST	1,611	3.1%	117,200	3.1%	78	2
47 HUNTLEY ST	1,297	2.5%	76,252	2.0%	59	1
215 LAKE SHORE BLVD E	1,147	2.2%	82,782	2.2%	49	3
25 ST MARY ST	1,143	2.2%	80,941	2.1%	59	2
83 BLOOR ST W	1,118	2.2%	70,503	1.8%	79	1
309 CHERRY ST	1,013	2.0%	71,614	1.9%	52	3
49 ONTARIO ST	1,004	1.9%	62,310	1.6%	36	2
1 YONGE ST (Phase 3)	1,000	1.9%	87,930	2.3%	92	2

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

Development projects with activity between January 1, 2017 and June 30, 2022. 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.

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 125 projects in the Development Pipeline that are located in the Centres (5% of total proposed projects), and contain 12% of the city's total proposed residential units and 4% of total proposed non-residential GFA. Collectively, these projects account for 83,393 residential units and 536,647 m² of non-residential GFA. Around 87% of proposed residential units in the Centres are either approved but not yet

built or under review, meaning that there is likely to be substantial construction in the Centres in coming years.

Residential projects in the Centres are generally large scale developments with an average of 667 residential units per project, the highest average project size of all the growth management areas. In comparison, residential projects in Downtown have an average of 343 units while the citywide average is 297 units per project (see Table 5 on page 12). Projects located in the Centres are becoming progressively larger in scale, with projects received between January 1, 2021 and June 30, 2022 having an average unit count of 1,231, compared

to 975 for all projects Under Review, 556 for Active projects, and 363 for Built projects.

Seven of the 17 largest projects (those proposing 1,000 residential units or more) proposed in the Centres are located within Scarborough and six are located in Etobicoke (see Table 9), the two Centres which have previously seen less development compared to the other Centres. The majority of large projects proposed within the Centres are Under Review (10 of 17), signifying increased development activity in these growth management areas.

Table 9: Centres Development Projects Proposing ≥ 1,000 Residential Units

	Proposed Residential Units		Proposed Residential GFA		Proposed Storeys (Tallest Building)	Proposed Buildings	
	#	%	#	%	#	#	
Centres	83,393	100.0%	6,093,233	100.0%			
Proposed Residential Units ≥ 1,000	45,204	54.2%	3,413,916	56.0%			
<i>Built Projects</i>	2,308	5.1%	163,420	4.8%			
64 CORDOVA AVE	Etobicoke Centre	1,219	2.7%	91,565	2.7%	45	3
2263 YONGE ST	Yonge Eglinton Centre	1,089	2.4%	71,855	2.1%	58	2
<i>Active Projects</i>	10,420	23.1%	849,290	24.9%			
675 PROGRESS AVE	Scarborough Centre	3,173	7.0%	276,582	8.1%	55	4
5415 DUNDAS ST W	Etobicoke Centre	2,875	6.4%	217,685	6.4%	44	4
1680 BRIMLEY RD	Scarborough Centre	1,591	3.5%	135,455	4.0%	47	4
5800 YONGE ST	North York Centre	1,496	3.3%	111,188	3.3%	44	3
0 BOROUGH DR W S	Scarborough Centre	1,285	2.8%	108,380	3.2%	45	2
<i>Projects Under Review</i>	32,476	71.8%	2,401,206	70.3%			
300 BOROUGH DR	Scarborough Centre	15,550	34.4%	1,149,000	33.7%	65	33
670 PROGRESS AVE	Scarborough Centre	3,105	6.9%	196,700	5.8%	54	8
2180 YONGE ST	Yonge Eglinton Centre	2,701	6.0%	216,162	6.3%	70	5
3741 BLOOR ST W	Etobicoke Centre	2,648	5.9%	216,470	6.3%	39	8
5230 DUNDAS ST W	Etobicoke Centre	2,130	4.7%	141,078	4.1%	45	7
3326 BLOOR ST W	Etobicoke Centre	1,415	3.1%	112,575	3.3%	51	3
1215 MCCOWAN RD	Scarborough Centre	1,412	3.1%	113,104	3.3%	55	3
140 GRANGWAY AVE	Scarborough Centre	1,229	2.7%	88,721	2.6%	53	3
56 FIELDWAY RD	Etobicoke Centre	1,149	2.5%	90,030	2.6%	35	3
48 AVONDALE AVE	North York Centre	1,137	2.5%	77,366	2.3%	42	1

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

Development projects with activity between January 1, 2017 and June 30, 2022. 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.

Avenues

The Avenues are corridors along major streets (see Map 1 on page 2) 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 contain the most proposed projects of any of the growth management areas. These 637 projects account for 162,228 residential units and 1,185,345 m² of non-residential GFA proposed in the current Development Pipeline. This represents 23% of the city's proposed units and 8% of its proposed non-residential GFA.

More than 86% of the residential units are in projects that are Active or Under Review. Combined, these units represent 6 times the magnitude of housing supply that has been built along Avenues over the past five and a half years. Similarly, 17 of the 23 largest projects (proposing 1,000 residential units or more) along the Avenues are Under Review, with only one having been built in the past five and a half years. This trend represents the successful uptake of the Avenues policy framework and points to the ongoing strength of residential development in these areas in the coming years.

There are 503,592 m² of non-residential GFA that has been built or is in Active projects along Avenues over the past five and a half years. In addition, 681,753 m² or 58% 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.

Many of the largest projects proposed within the Avenues are located along Eglinton Avenue (see Map 2 on page 6), representing a response from the development industry to the Eglinton Crosstown LRT that is currently under construction. Other notable Avenue segments with a number of large projects proposed along them are Sheppard Avenue and Yonge Street.

Other Mixed Use Areas

Outside of Downtown and the Central Waterfront, 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 Mixed Use Areas outside of the Avenues, Centres and Downtown and Central Waterfront have 147,027 residential units and 1,384,044 m² of non-residential GFA proposed within 260 projects. This accounts for 21% of the city's proposed residential units and 10% of its proposed non-residential GFA. Over 90% of the proposed residential units in these areas are in projects that are either Under Review or Active. Similarly, 82% of the proposed non-residential development is in Active or Under Review projects. There were 33 projects in the current Pipeline proposing 1,000 residential units or more.

All Other Areas

Just over 144,000 residential units or 20% of the total units proposed in the city are outside of the growth areas of the Downtown and Central Waterfront, the Centres, Avenues and other Mixed Use Areas. This is more than double the number of proposed units compared to the 2020 Pipeline. These projects are generally small infill developments in areas designated as Neighbourhoods or Apartment Neighbourhoods. About three-quarters (74%) of the residential units proposed in All Other Areas are under review. Of the large projects (those proposing 1,000 residential units or more) in the current Pipeline, 22 are located in All Other Areas.

There is 6,494,747 m² of non-residential GFA proposed in All Other Areas, close to the amount of total non-residential GFA proposed in the city's growth areas. Almost two-thirds (65%) of this space is located in the designated Core or General Employment Areas which the Official Plan targets for non-residential growth. About 2,622,313 m² or 40% of non-residential GFA proposed in All Other Areas is approved but not yet built.

The City's growth areas are where the majority of development activity is taking place, however an increasing amount of development is being proposed in All Other Areas, including in Secondary Plan areas. With the magnitude of development activity taking place all across the city, and the increasing amount outside growth areas, the work of City Planning will be key in enabling Toronto's growth and success.

Secondary Plan Areas

Secondary Plans guide development and investment within a local context. There are currently 43 Secondary Plan areas which are approved and in-force and 6 Secondary Plans that have been adopted or endorsed by City Council but have not yet received approval from the Provincial government or are under appeal (see Table 10 for a complete list of Secondary Plan areas). The City's Secondary Plans cover a wide range of geographies within the city and are comprised of a mix of land use designations where development may be encouraged. Some Secondary Plans also overlap with areas covered by other Official Plan policies, such as Downtown and the Central Waterfront, the Centres, and the Avenues. Map 5 (on page 27) displays the areas of the Secondary Plans and the locations of development projects within each one.

Since the last publication of the Development Pipeline Bulletin in 2021, several new Secondary Plans have been adopted or endorsed by City Council. Secondary Plans that have been adopted or endorsed by Council, but are pending approval from Minister of Municipal Affairs and Housing or currently under appeal and not yet in effect are:

- Dufferin Street - appealed
- Golden Mile - appealed
- Keele Finch - endorsed by council
- Keele St.Clair
- Mount Dennis - appealed
- Yonge Street North - appealed

Council-adopted Secondary Plans that are before the Minister for approval or under appeal may be subject to change, pending decisions of the Minister or the Ontario Land Tribunal.

As seen in Table 11 (on page 29), 1,109 projects are proposed in Secondary Plan areas or 46% of projects in the Pipeline. These projects propose 509,605 residential units and 10,018,033 m² of non-residential GFA. This represents 71% of the proposed residential units and 69% of the proposed non-residential GFA in the entire city. There are slightly more Active projects (415) than Under Review projects (401) in the Secondary Plan areas, and there are fewer Built projects (293). The comparatively lower number of Built within Secondary Plan areas under appeal is likely a reflection of projects being contingent on the underlying Official Plan Amendment being approved.

A number of areas covered by a Secondary Plan are outside of Downtown, the Centres, the Avenues, and other Mixed Use Areas. There are 78,739 residential units and 3,019,638 m² 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, the Centres, the Avenues and other Mixed Use Areas, then 91% of the residential units and 76% of the non-residential GFA in the Pipeline are proposed in a growth management area.

Table 10: Proposed Development by Secondary Plan Area

Geography	Number of Projects	%	Proposed Residential Units	%	Proposed Non-Residential GFA	%
City of Toronto	2,413	100.0%	717,327	100.0%	14,484,961	100.0%
Secondary Plans	1,109	45.9%	509,605	71.1%	10,018,033	69.2%
Agincourt	9	0.8%	9,655	1.9%	51,274	0.5%
Central Don Mills	8	0.7%	3,823	0.8%	39,071	0.4%
Central Finch	15	1.4%	799	0.2%	1,043	0.0%
Central Waterfront	58	5.2%	28,527	5.6%	870,445	8.7%
Christie's	1	0.1%	7,504	1.5%	116,877	1.2%
ConsumersNext	19	1.7%	8,189	1.6%	106,894	1.1%
Davenport Village	3	0.3%	1,024	0.2%	3,157	0.0%
Don Mills Crossing	3	0.3%	6,469	1.3%	89,424	0.9%
Downsview Area	22	2.0%	51,492	10.1%	1,205,208	12.0%
Downtown	515	46.4%	179,180	35.2%	4,780,516	47.7%
Dufferin Street*	8	0.7%	3,620	0.7%	13,630	0.1%
Emery Village	6	0.5%	5,157	1.0%	4,514	0.0%
Etobicoke Centre	30	2.7%	17,575	3.4%	150,471	1.5%
Fort York Neighbourhood	3	0.3%	1,345	0.3%	23,655	0.2%
Garrison Common North	47	4.2%	10,799	2.1%	354,678	3.5%
Golden Mile*	16	1.4%	32,932	6.5%	197,902	2.0%
Highland Creek	13	1.2%	639	0.1%	69,411	0.7%
Keele Finch*	7	0.6%	4,009	0.8%	44,540	0.4%
Keele St.Clair*	16	1.4%	9,563	1.9%	78,356	0.8%
King-Parliament	50	4.5%	19,841	3.9%	398,515	4.0%
King-Spadina	79	7.1%	27,394	5.4%	693,539	6.9%
Lawrence-Allen	13	1.2%	7,716	1.5%	130,099	1.3%
Mimico-by-the-Lake	2	0.2%	610	0.1%	764	0.0%
Mimico-Judson	7	0.6%	5,351	1.1%	32,017	0.3%
Morningside Heights	5	0.5%	0	0.0%	95,553	1.0%
Motel Strip	8	0.7%	5,035	1.0%	26,586	0.3%
Mount Dennis*	20	1.8%	4,517	0.9%	287,235	2.9%
North York Centre	36	3.2%	12,330	2.4%	106,313	1.1%
Port Union Village Community	0	0.0%	0	0.0%	0	0.0%
Queen River	7	0.6%	1,981	0.4%	7,314	0.1%
Rail Deck Park	1	0.1%	5,754	1.1%	22,359	0.2%
Railway Lands Central	4	0.4%	2,229	0.4%	299,842	3.0%
Railway Lands East	5	0.5%	0	0.0%	512,692	5.1%

Table 10 continues on the next page

Table 10 continued

Geography	Number of Projects	%	Proposed Residential Units	%	Proposed Non-Residential GFA	%
Railway Lands West	4	0.4%	6,661	1.3%	39,403	0.4%
Regent Park	6	0.5%	6,090	1.2%	28,327	0.3%
Scarborough Centre	11	1.0%	29,260	5.7%	104,300	1.0%
Sheppard Avenue Commercial Area	5	0.5%	59	0.0%	2,772	0.0%
Sheppard East Subway Corridor	49	4.4%	22,699	4.5%	166,166	1.7%
Sheppard Lansing Area	9	0.8%	371	0.1%	4,585	0.0%
Sheppard West/Dublin	10	0.9%	1,088	0.2%	4,433	0.0%
Sherway Area	6	0.5%	4,517	0.9%	222,406	2.2%
Swansea	4	0.4%	1,834	0.4%	7,760	0.1%
Unilever Precinct	2	0.2%	0	0.0%	932,869	9.3%
University of Toronto	22	2.0%	1,650	0.3%	137,211	1.4%
Warden Woods	11	1.0%	3,168	0.6%	16,096	0.2%
Yonge Eglinton	115	10.4%	38,361	7.5%	288,525	2.9%
Yonge St. Clair	26	2.3%	5,155	1.0%	62,786	0.6%
Yonge Street North*	11	1.0%	13,146	2.6%	44,604	0.4%
York University	10	0.9%	860	0.2%	48,697	0.5%

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

1) Development projects with activity between January 1, 2017 and June 30, 2022. 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.

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.

*Secondary Plan has been approved by Council but has not yet been approved by the Province.

The Downtown Plan

The Secondary Plan for Downtown (the Downtown Plan) has been in effect since June 5th, 2019.² 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.³

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 both a local and national economic hub. Map 5 (on page 27) shows that the Downtown Plan area contains nine Secondary Plans within its borders, including the newly approved Rail Deck Park Secondary Plan, as well as portions of the Fort York Neighbourhood Secondary Plan and the Central Waterfront Secondary Plan area. Table 10 (on pages 24 and 25) shows that the Downtown Plan contains the greatest number of development projects of all the Secondary Plan areas, at 515. Collectively, these projects propose 179,180 residential units and account for 25% of all proposed residential units in the city and 35% proposed within Secondary Plan areas. The area also contains 4,780,516 m² of non-residential GFA, accounting for 33% of all proposed non-residential GFA in the city and 48% of all proposed non-residential GFA in Secondary Plan areas.

Secondary Plan Areas within the Downtown Plan Area

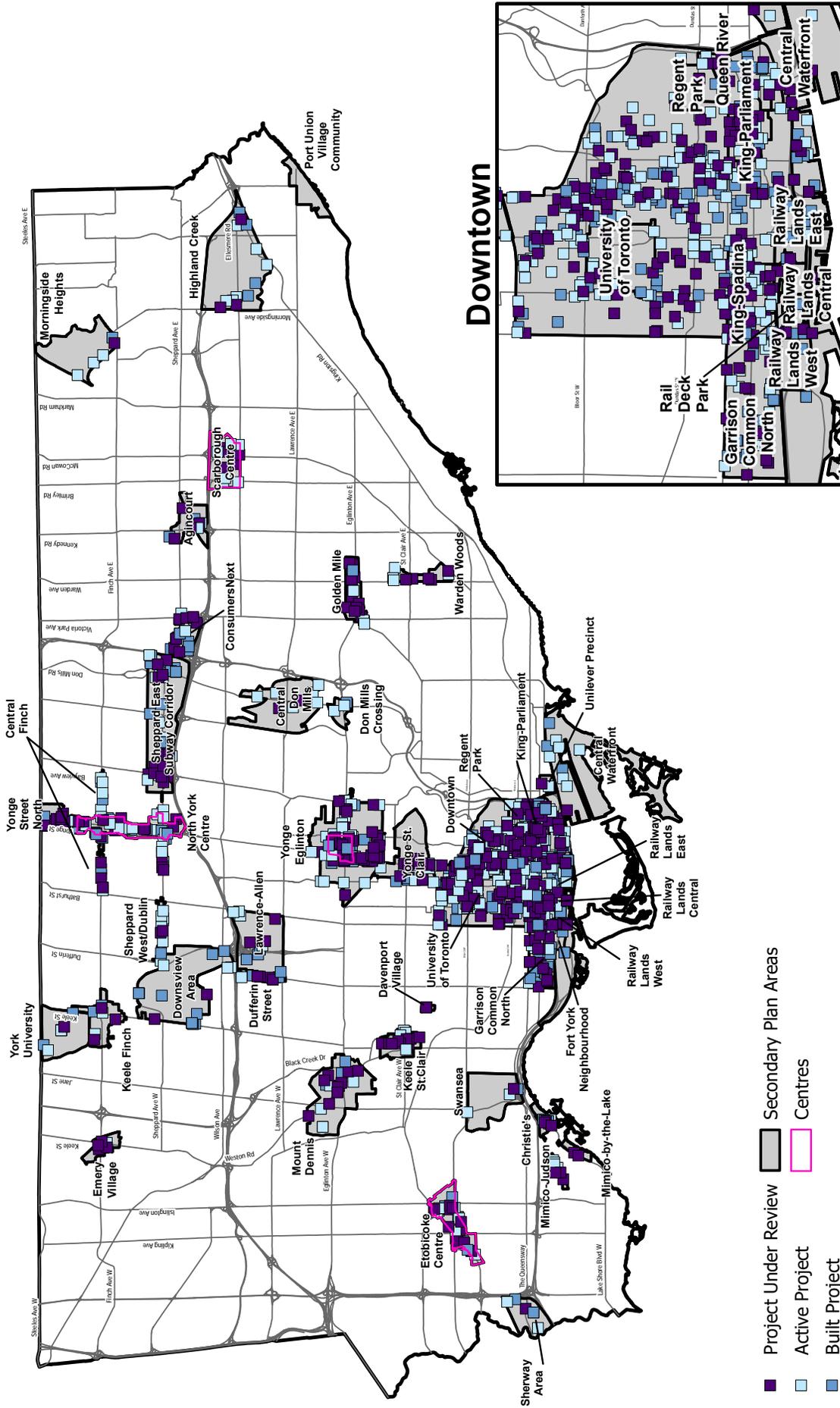
The **Downtown Plan** area overlaps with several other Secondary Plan areas. The Central Waterfront Secondary Plan area contains the largest amount of non-residential GFA after the Downtown Plan area, the Downsview Secondary Plan Area, and the Unilever Precinct, with 870,445 m² of non-residential GFA proposed (6% of the total proposed within the city). Most of the proposed non-residential GFA in the Central Waterfront also falls within the Downtown Plan area. There are 28,527 residential units also proposed within the Central Waterfront Secondary Plan area.

The **King-Spadina Secondary Plan** area is an area targeted for growth and new investment. The Secondary Plan recommends that development provide a full mix of uses that are compatible with the existing and planned context, conserve cultural heritage resources, and improve and expand the public realm. The King-Spadina Secondary Plan continues to show strong development activity with the most development projects (79) after the Downtown Plan and the Yonge-Eglinton Secondary Plan. King-Spadina accounts for 27,394 proposed residential units and 693,539 m² of proposed non-residential GFA.

The **King-Parliament Secondary Plan** builds on the Downtown Plan, and provides specific direction on built form, the public realm and heritage conservation. The Secondary Plan contains 50 development projects which propose 19,841 residential units and 398,515 m² of non-residential GFA.

The **Railway Lands East Secondary Plan** is also undergoing significant non-residential development with 512,692 m² 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.⁴

Map 5: Proposed Development in Secondary Plan Areas



- Project Under Review
- Active Project
- Built Project
- Secondary Plan Areas
- Centres

Source: Land Use Information System II
 Development projects with activity between January 1, 2017 and June 30, 2022. 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.

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Secondary Plan Areas outside Downtown and Central Waterfront

An updated **Yonge-Eglinton Secondary Plan** has been in effect since June 2019.⁵ The Yonge-Eglinton Secondary Plan contains the second most development projects (115) outside of the Downtown Plan area, accounting for 38,361 proposed residential units and 288,525 m² of non-residential GFA. The Yonge-Eglinton Secondary Plan area accounts for 8% of proposed residential units within all Secondary Plan areas.

Building from Site and Area Specific Policy (SASP) No. 426, the **Unilever Precinct Secondary Plan** was introduced to guide the unique opportunities and challenges presented by the anticipated significant employment growth in the East Harbour area. Its two projects in the Pipeline propose a mix of commercial, institutional and industrial uses. Together they represent 932,869 m² of non-residential GFA, the third largest amount of non-residential GFA proposed in a Secondary Plan area, demonstrating a continued trend toward larger projects in the Pipeline as well as the revitalization of the waterfront area.

The **Rail Deck Park Secondary Plan** applies to both the land and air rights within and above the rail corridor between Bathurst Street and Blue Jays Way, and is directly adjacent city-owned properties including Northern Linear Park and the planned Mouth of the Creek Park. The total area of the Rail Deck Park Secondary Plan is 8.8 hectares. A single project is proposed within a portion of the Secondary Plan area bounded by Front Street West between Spadina and Bathurst; Blue Jays Way; Ice Boat Terrace; and Bathurst Street. The proposal is to develop a rail corridor overbuild (deck) over the existing active rail corridor to accommodate development, while maintaining the rail activities. The Rail Deck District project proposes a mixed-

use development with an open space component, consisting of 5 buildings with 5,754 residential units and 22,359 m² of non-residential GFA.

The **Garrison Common North Secondary Plan** has attracted a mix of residential and non-residential development in accordance with one of the Plan's major objectives to include a variety of proposed land uses. The area, which includes Liberty Village and the Centre for Addiction and Mental Health (CAMH) Queen Street West campus, contains 2% of the residential units and 4% of the non-residential GFA proposed in all Secondary Plan areas.

The **Etobicoke Centre Secondary Plan** area is achieving its objective as the "urban focal point for the western part of the City".⁶ Etobicoke Centre has seen the most development out of all of the Secondary Plans in Etobicoke and York in terms of the number of projects (30), the number of proposed residential units (17,575), and the amount of proposed non-residential GFA (150,471 m²). The City completed reconstruction of the Six Points intersection at Kipling Ave, Dundas St W, and Bloor St W in 2021 to support the development of Etobicoke Centre as a vibrant mixed use transit-oriented community.⁷ This new road reconfiguration will make new land available for a new civic centre, recreation centre, library, child care facility and private development.

Now in effect the **Christie's Secondary Plan** will guide the transformation of the site once used for manufacturing into a series of new streets featuring a diversity of housing and non-residential uses, new community facilities, two new parks and a transit hub.⁸ Currently proposed for the site is 7,504 residential units and 116,877 m² of non-residential GFA.

The Scarborough Community Council area has a large amount of both residential and non-residential development within a number of Secondary Plan areas. In the **Agincourt Secondary Plan** area, nine projects are

collectively proposing 9,655 residential units and 51,274 m² of non-residential GFA, including the redevelopment of Agincourt Mall that is currently Under Review. The **Scarborough Centre Secondary Plan** area contains 11 projects proposing 29,260 residential units and 104,300 m² of non-residential GFA including retail, office and transit uses. The **Morningside Heights Secondary Plan** area has also attracted a large project at Morningside Avenue and Neilson Road, proposing 30,996 m² of industrial uses in the form of a warehousing/distribution facility, accounting for almost one-third of the non-residential GFA proposed within the Secondary Plan area.

The **ConsumersNext Secondary Plan**, in effect except for portions still under appeal, and **Golden Mile Secondary Plan**, adopted by Council but currently under appeal, will manage the integration of residential uses into areas of the city currently dominated by non-residential uses, ensuring there is an appropriate mix of residential and non-residential development and corresponding services. Within the Secondary Plan boundaries adopted by City Council, ConsumersNext accounts for 8,189 residential units and 106,894 m² of non-residential GFA within 19 projects, while Golden Mile accounts

for 32,932 residential units and 197,902 non-residential GFA within 16 projects.

North York Centre Secondary Plan area and the newly adopted **Yonge Street North Secondary Plan** (currently under appeal) area represent significant development activity in the North York Community Council Area. Covering the Yonge Street corridor from Sheppard Avenue to Finch Avenue there are a combined 47 development projects proposing 25,476 residential units and 150,918 m² of non-residential GFA between the two Secondary Plan areas.

The **Sheppard East Subway Corridor Secondary Plan** area has also attracted a significant amount of development, with 49 development projects representing 4% of all secondary plan area development projects, 22,699 residential units and 166,166 m² of non-residential development proposed.

The **Downsview Area Secondary Plan** will shape the creation of a new complete community. The Secondary Plan area is set to undergo a large transformation over the coming years and decades with the proposed redevelopment of the Downsview Airport lands. In total, 51,492 residential units and 1,205,208 m² non-residential GFA is proposed for the Downsview Secondary Plan area; the proposed redevelopment of Downsview Airport alone accounts for 46,000 residential units and 1,114,000 m² of non-residential GFA.

Table 11: Proposed Development in Secondary Plan Areas by Status

	Number of Projects	%	Proposed Residential Units	%	Proposed Non-Residential GFA	%
City of Toronto	2,413	100.0	717,327	100.0	14,484,961	100.0
Secondary Plans	1,109	46%	509,605	71%	10,018,033	69%
Under Review	401	36%	292,864	57%	4,008,716	40%
Active	415	37%	135,855	27%	4,044,196	40%
Built	293	26%	80,886	16%	1,965,121	20%

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

Development projects with activity between January 1, 2017 and June 30, 2022. Built projects are those which became ready for occupancy and/or were completed. Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or those which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal. Gross floor area values are expressed in square metres.

Note that the totals include Secondary Plan areas that have been adopted by Council but that have not yet been approved by the Province.

Employment Areas

What are Employment Areas?

Toronto's Employment Areas "are places of business and economic activity vital to Toronto's economy and future economic prospects".⁹ These are land use designations identified in the Official Plan. In 2011, the City commenced its first Municipal Comprehensive Review (MCR) of employment lands as required by the *Places to Grow Act*¹⁰ with Council's adoption of Official Plan Amendment 231 (OPA 231)¹¹ which received Ministerial approval in part with minor modifications in July 2014. A *Place to Grow*, the new Growth Plan for the Greater Golden Horseshoe, came into force in 2019 and was amended on August 28, 2020 with revised forecasts and changes to specific policies. Council adopted updated Employment Lands policies related to the second MCR in July 2022 and Planning and Housing Committee considered the supporting Land Needs Assessment (LNA) on July 5th, 2022. The LNA is a required study to determine the quantity of land required to accommodate forecasted population and employment growth to 2051. The MCR policies and the LNA are scheduled to be refined and finalized in the first half of 2023.

OPA 231 includes new policies for the City's economic health and lands designated as Employment Areas. OPA 231 was appealed to the Ontario Municipal Board in 2014. On January 30th, 2020, the LPAT issued its decision on the Council adopted policies related to Employment Area conversions. The LPAT supported the City's position that the City's Employment Areas are a finite land resource that should be preserved and protected for the long-term. The LPAT Decision put into place a policy framework intended to provide a level of land use certainty that can help businesses make long-term investment decisions that support the city's economy and provide a diverse range of jobs.

Development in Employment Areas

The Development Pipeline covers development activity during the years 2017 to June 30, 2022. Prior to June 2015, Employment Districts were part of Toronto's Urban Structure as described in Chapter 2 of the Official Plan. In June 2015, the Ontario Municipal Board approved portions of OPA 231, deleting the term Employment Districts within Chapter 2 and replacing it with the term Employment Areas. As such, this bulletin outlines development activity in the designated Employment Areas.

There is a long standing trend towards North American metropolitan areas losing manufacturing activities to suburban locations over time.¹² The 2021 Toronto Employment survey revealed that the Manufacturing and Warehousing category declined by a further 1.7%, or 2,260 jobs, in 2021 in part due to the ongoing impacts of the COVID-19 pandemic, having declined by 5.3% (7,270 jobs) in 2020, the first year of the pandemic. The Provincial Government classified industries such as manufacturing, food retail, and pharmacy as "essential businesses" at the onset of the pandemic. Only these essential businesses were permitted to operate at that time. Despite overall losses in 2021, gains were observed in a few manufacturing activities, including Component Parts (8.7% or 240 jobs). While Manufacturing has experienced a long-term decline over the past 35 years, the majority of that decline occurred prior to 2009. The category experienced positive growth from 2014 to 2019, adding 10,150 jobs or 8% over that period. Further, despite experiencing job losses in 2020 and 2021, as of 2022 Q2, Toronto saw a 0.1% industrial vacancy rate, slightly lower than the GTA which saw a rate of 0.2%,¹³ demonstrating that industrial spaces remained almost fully occupied. This is also lower when compared to 2020 Q3 when a rate of 0.5% was observed for the city.¹⁴ Employment Areas are particularly important to the Manufacturing sector

with approximately four out of five Manufacturing establishments and 88.6% of Manufacturing jobs located in Toronto's Employment Areas.¹⁵

The protection and enhancement of Employment Areas is vital to the city's economic health. Employment Areas contained 4,190,144 m² or 29% of the city's proposed non-residential GFA from 2017 to June 30th, 2022 (see Table 12 and Maps 7 and 8 on pages 36 and 37). By June 30th, 2022, 26% of these projects had been built, which amounts to 828,980 m² of new non-residential floor space in 79 different development projects.

As development progresses on projects that have been approved, another 1,960,404 m² of non-residential GFA

in 104 projects is expected to be constructed in Employment Areas. A further 122 projects with 1,400,761 m² of non-residential GFA is under review and may eventually be approved and constructed in Employment Areas.

Over 55% of non-residential development is proposed in the growth management areas of the Official Plan. If non-residential development in Employment Areas is added to the development in Downtown, the Centres, the Avenues, and Other Mixed Use Areas, the percentage of non-residential development occurring in an area targeted for growth rises to 84%. If Secondary Plan areas are included, the percentage of non-residential development occurring in an area targeted for growth rises to almost 96%.

Table 12: Proposed Development in Employment Areas by Status

	Projects		Proposed Non-Residential Gross Floor Area	
	Number	Percent	Number	Percent
City of Toronto	2,410		14,487,860	100.0%
Total Employment Areas	305	100.0%	4,190,144	28.9%
Built	79	25.9%	828,980	19.8%
Active	104	34.1%	1,960,404	46.8%
Under Review	122	40.0%	1,400,761	33.4%
Total Employment Areas	305	100.0%	4,190,144	100.0%
Core Employment Areas	172	56.4%	2,018,993	48.2%
Built	43	25.0%	645,435	32.0%
Active	60	34.9%	677,218	33.5%
Under Review	69	40.1%	696,341	34.5%
General Employment Areas	133	43.6%	2,171,151	51.8%
Built	36	27.1%	183,545	8.5%
Active	44	33.1%	1,283,187	59.1%
Under Review	53	39.8%	704,420	32.4%

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

Development projects with activity between January 1, 2017 and June 30, 2022. Built projects are those which became ready for occupancy and/or were completed. Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or those which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal. Gross floor area values are expressed in square metres.

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

Core Employment Areas and General Employment Areas

In December 2016, the Ontario Municipal Board issued a partial approval of OPA 231, bringing into effect the Core Employment Area and General Employment Area land use designations. Core Employment Areas are, for the most part, geographically located within the interior of Employment Areas. Uses that would attract the public into the interior of employment related lands and possibly disrupt industrial operations are not generally permitted in the Core Employment Areas. This separation prioritizes goods movement within Core Employment Areas and provides operating businesses certainty as to their surrounding uses. Uses permitted in Core Employment Areas are all types of manufacturing, processing, warehousing, wholesaling, distribution, storage, transportation facilities, vehicle repair and services, offices, research and development facilities, utilities, waste management systems, industrial trade schools, media, information and technology facilities, and vertical agriculture.

General Employment Areas are usually located on the periphery of Employment Areas on major roads where retail stores, service shops, and restaurants can serve workers in the Employment Areas and would also benefit from visibility and transit access to draw the broader public. Uses permitted in General Employment Areas include all those permitted in Core Employment Areas, as well as restaurants, retail, and service uses.¹⁶

In Core Employment Areas, the quantity of non-residential GFA proposed between 2017 and June 30th, 2022 has been increasing in magnitude. This indicates a growing development interest and investment in these areas. In the General Employment Areas, the largest amount of proposed non-residential GFA is in Active projects, largely due to the East Harbour development at 21 Don Valley Parkway. There are more Under Review projects in General Employment Areas than Active projects, and more Active projects than Built projects.

Table 13: Proposed Industrial GFA in Employment Areas

Area	Built	Active	Under Review	Total in Pipeline	Percent	Percent in Employment Areas
City of Toronto	577,427	548,321	690,202	1,815,950	100.0%	
Employment Areas	552,641	464,839	562,527	1,580,007	87.0%	100.0%
Core Employment	518,652	338,302	332,803	1,189,757	65.5%	75.3%
General Employment	33,990	126,537	229,723	390,250	21.5%	24.7%

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

Development projects with activity between January 1, 2017 and June 30, 2022. Built projects are those which became ready for occupancy and/or were completed. Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or those which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal. Gross floor area values are expressed in square metres.

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

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

Employment Areas continue to provide an attractive location for development projects, in particular those that include industrial GFA. The current Pipeline contains more than 1.58 million m² of proposed industrial GFA in Employment Areas (see Table 13). In 2022 Q2, Toronto accounted for 17% of all the industrial GFA currently under construction in the GTA,¹⁷ an increase of 2% from 2021 Q2.¹⁸ The majority of the industrial GFA in Employment Areas is proposed in Core Employment Areas (75%), while 25% is proposed in General Employment Areas, in alignment with Official Plan policies.

In Core Employment Areas, over half of the proposed GFA is Industrial (59%), totaling 1,189,757 m² (see Table 12 and Table 13). The remaining proposed GFA is mostly split between Institutional and Office uses. Built and Approved Industrial GFA represents about 42% or 856,954 m² of all GFA in Core Employment Areas over the last five-and-a-half years. An additional 332,803 m² of proposed Industrial GFA in Core Employment Areas is under review.

Conversion Requests

The City Planning Division has received approximately 150 requests to convert lands designated Core Employment Areas or General Employment Areas to non-employment uses as part of the MCR. City Council authorized the commencement of the Municipal Comprehensive Review on August 4th, 2020, and requested the Chief Planner to receive written conversion requests pursuant to *A Place to Grow* 2019 policies 2.2.5.9 and 2.2.5.10 until August 3rd, 2021. At its meeting on July 19 – 22, 2022, City Council adopted the final report on Employment policies and the first group of land use conversions. Staff will advance the next MCR phases that will include the remaining Employment Area conversion requests.

Areas of Employment

Areas of Employment (AOEs) is a term introduced by Hemson Consulting Ltd in their work on the Land Needs Assessment, and comprises an area which the City of Toronto will be monitoring and reporting on into the future. According to the Ontario Planning Act an "area of employment" means an area of land designated in an official plan for clusters of business and economic uses including, without limitation, the uses listed in subsection (5) [of the Act], or as otherwise prescribed by regulation". These uses include manufacturing, warehousing, office, associated retail uses and ancillary facilities. In Toronto, there are 23 AOEs which represent geographic clusters of lands designated as either Core Employment Area or General Employment Area in the Official Plan, as well as some areas with Regeneration or Utility uses, and comprise specific precincts throughout the city such as the Port Lands and the Dufferin Employment District (see Map 6 on page 35).

For the purposes of reporting, only those lands designated Employment Areas within the AOEs are reported. While there are a few pockets of Employment Areas not included within the AOEs, the number of projects and total non-residential GFA proposed within AOEs being reported reflects those which are proposed within designated Employment Areas.

The three AOEs with the largest amount of proposed non-residential GFA in the 2022 Q2 Pipeline are South of Eastern (1,115,056 m²), Tapscott (543,893 m²), and Rexdale Airport (476,141 m²). Together, they comprise about half of the total proposed non-residential GFA within AOEs. A total of nine AOEs have more than 100,000 square metres proposed, and include Junction-Weston-Dupont, South Etobicoke (Central part), Highway 400, Downsview, Scarborough Highway 401, and Leaside-Thorncliffe Park.

Toronto's Non-Residential Market

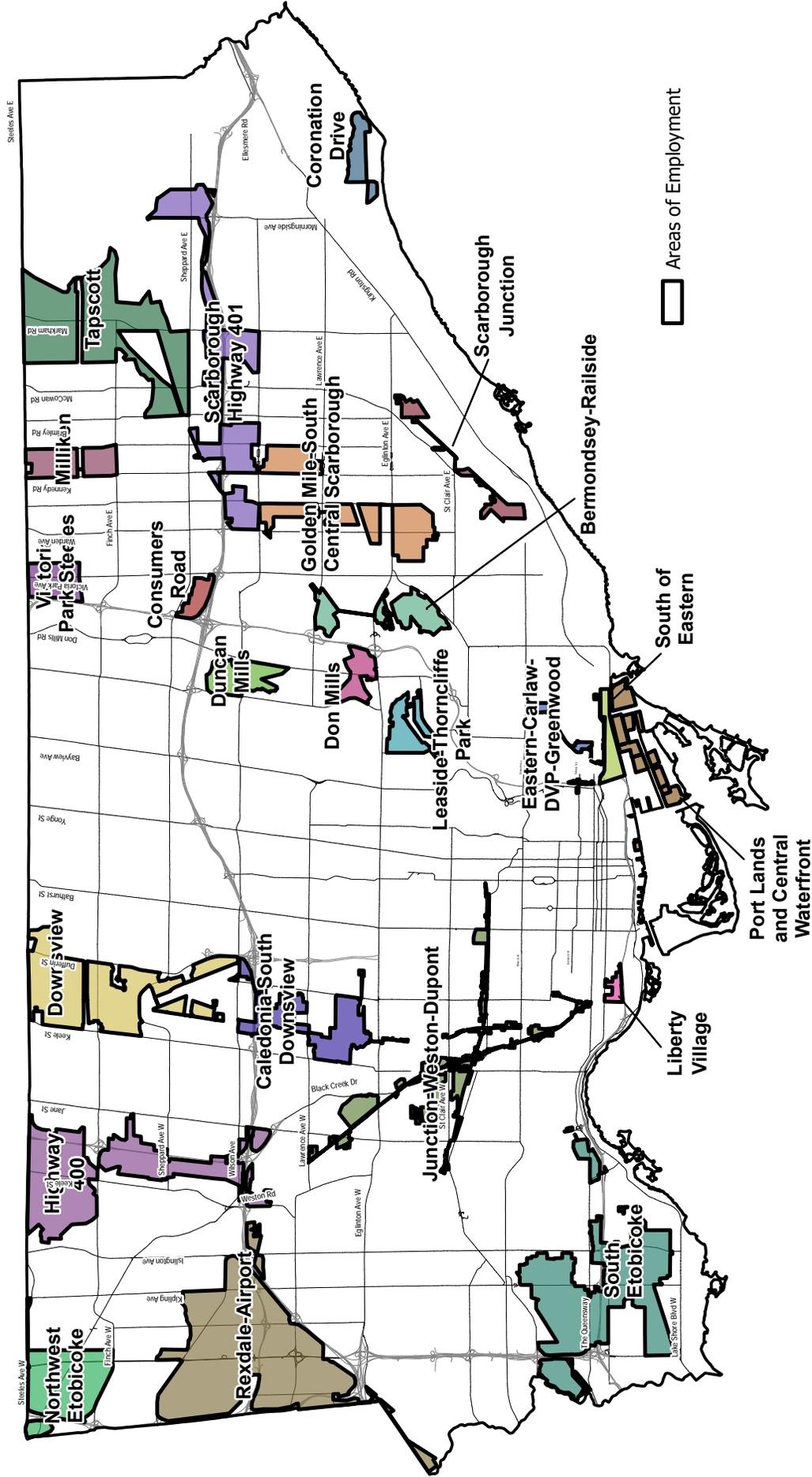
The city's non-residential market, including office, retail, institutional and hotels, remained strong during the 2017 to June 30th, 2022 Development Pipeline period (see Maps 7 and 8 on pages 36 and 37). There were 476,357 m² constructed in projects larger 100,000 m² throughout the City (see Table 14 on page 39). All of these projects were built and ready for occupancy before June 30th, 2022.

The majority of retail uses are being proposed in Mixed Use Areas, followed by Downtown and the Central Waterfront and along Avenues. Office uses constitute the largest proportion of non-residential uses in Downtown and the Central Waterfront and all of the Centres except for Scarborough Centre, where the majority of non-residential uses proposed are Retail.

The trend toward significant Office construction is continuing despite the initial impacts of the COVID-19 pandemic on how and where employees work. The pursuit of new large projects by applicants points to a continuing demand for non-residential space in the city generally, and in Downtown and the Central Waterfront in particular. There is almost four times the amount of Active and Under Review non-residential development proposed than what was built in the last five years.

A number of large non-residential projects are Active or Under Review. Table 14 on page 39 breaks down the largest proposed non-residential projects by status and location.

Map 6: Areas of Employment

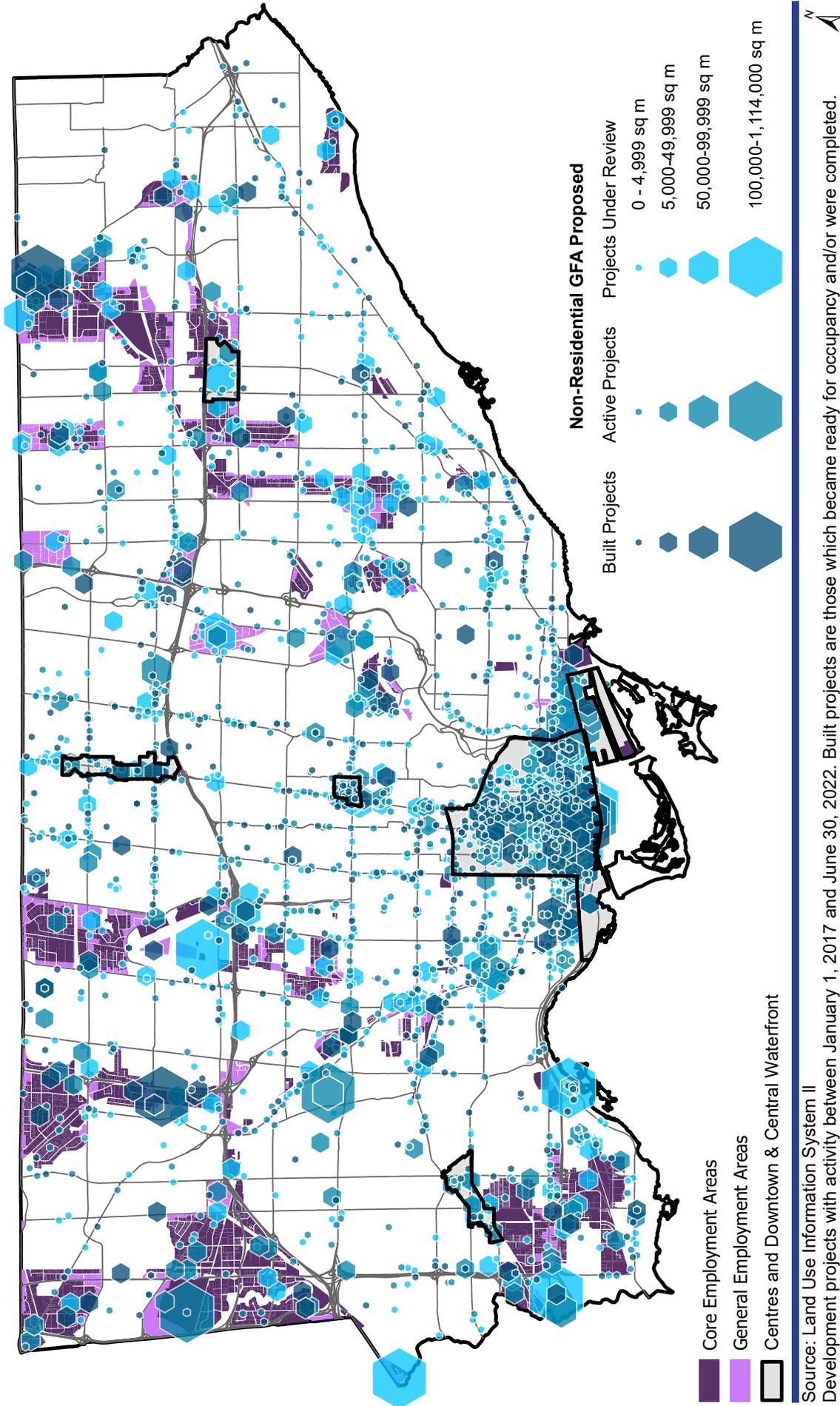


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Map 7: Non-Residential Development

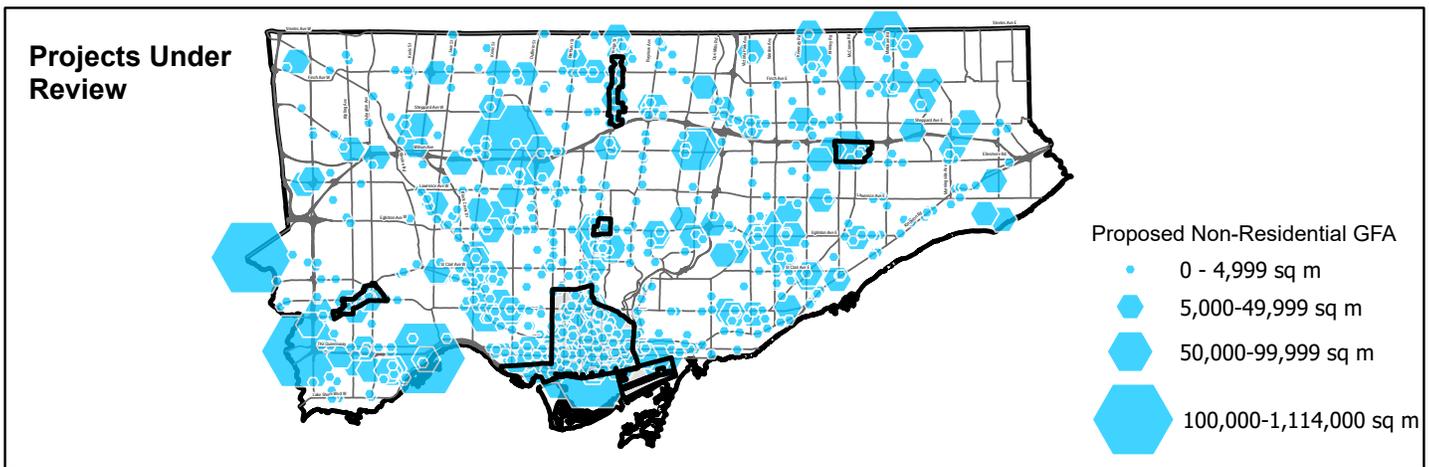
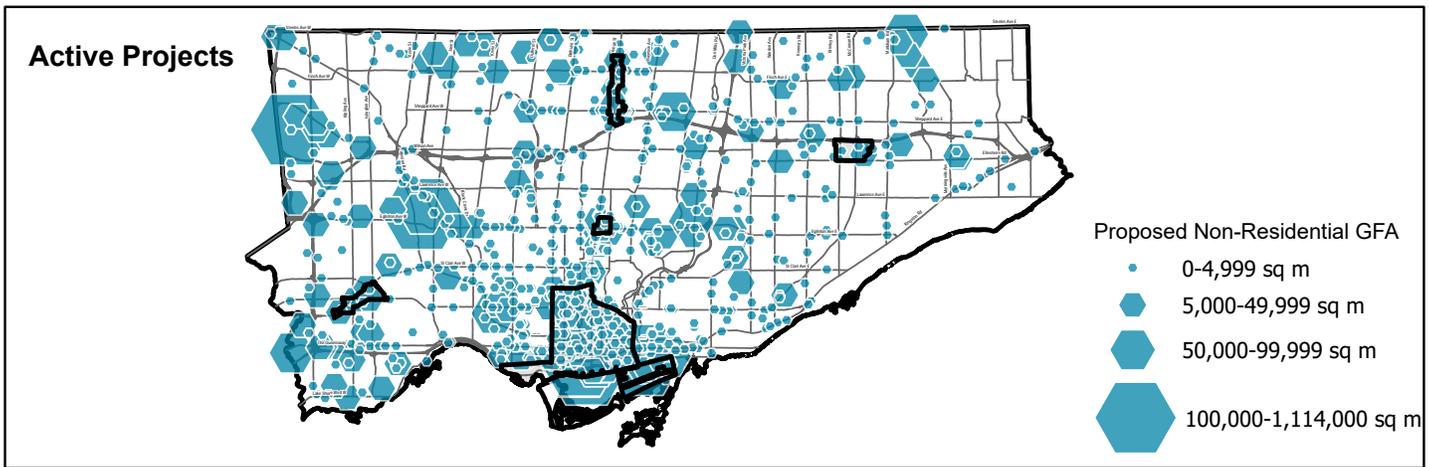
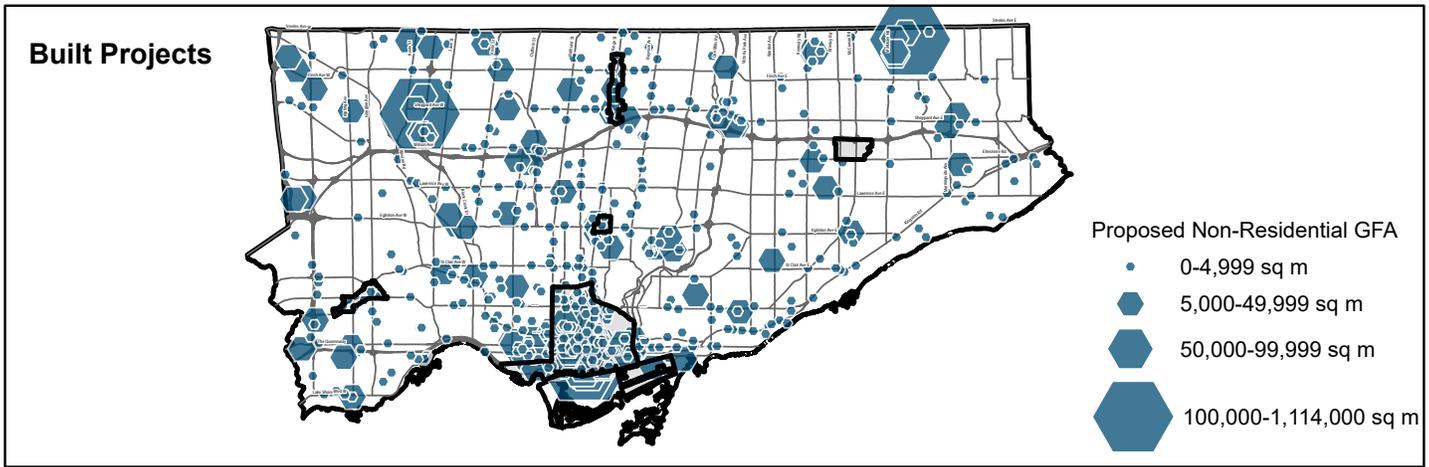


Source: Land Use Information System II
 Development projects with activity between January 1, 2017 and June 30, 2022. Built projects are those which became ready for occupancy and/or were completed. Active projects are those which have been approved, for which Building Permits have been applied or have 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.

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Map 8 Non-Residential Development by Status



Source: Land Use Information System II
 Development projects with activity between January 1, 2017 and June 30, 2022. 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.

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Core Employment Areas

General Employment Areas

Centres and Downtown & Central Waterfront

Five Largest Active Projects

- East Harbour at 21 Don Valley Parkway, which proposes to redevelop the Unilever site into a major retail, office, and transportation hub;
- 82 Buttonwood Avenue, a redevelopment of West Park Healthcare Centre campus and other institutional uses;
- 25 King Street West, a 64-storey office-retail building on the Commerce Court site and an addition to Hotel Victoria;
- 141 Bay Street, a redevelopment of the Dominion Public Building within the Financial District which proposes a mix of hotel, office, retail and residential uses;
- 30 Bay Street, proposes a 57-storey Class A office tower at the corner of Bay and Harbour Streets.

Five Largest Under Review Projects

- 123 Garratt Boulevard, which proposes to redevelop land consisting of the Bombardier hangars and a portion of the Downsview Airport taxiway into an employment hub home to technology and creative industries;
- 325 Front Street West, a mixed-use development including residential, office and retail uses in four buildings (2 residential and 2 office) and open space uses over the rail corridor²
- 2150 Lake Shore Boulevard West, which proposes to redevelop the site formerly occupied by the Mr. Christie bakery into a mixed-use community containing office, retail, community, residential and open space uses in seven buildings;

- 25 The West Mall, a redevelopment of Sherway Gardens with office, hotel, retail, community, residential and open space uses in eight new buildings;
- 1 Yonge Street (Phases 4 and 5), which proposes a mixed-use redevelopment located at the foot of Yonge Street within the Central Waterfront, containing office, hotel, retail, theatre, and daycare uses in four buildings.

According to CBRE, Toronto accounts for 97% of the office space currently under construction in the GTA, and Downtown alone accounts for 87%, as compared to 92% in 2019 and 99% in 2020.^{19,20} Outside of Downtown, the bulk of office space construction is occurring in the East York/Don Mills South and North Yonge areas.²¹ So while the Downtown has a slightly smaller share of new office construction, the dispersion has remained within the city rather than elsewhere in the GTA.

Overall office vacancy was 11.9% in 2022 Q2 in Toronto and 11.8% in Q3,²² up from 4.2% in 2019 prior to the start of the pandemic.²³ Despite uncertainty in the market, overall average net rents have also remained steady, dropping only 0.2% in the same time period, and down by 1.6% from 2020 Q1,²⁴ at the very start of the pandemic. Not all office space has been impacted equally by the pandemic and resulting economic uncertainty, creating dichotomous market conditions based on space quality, location and service, with high-quality, well-amenitized space in prime locations fairing the best. In Downtown Toronto, newer office buildings built after 2009 and Class AAA office space continued to have vacancy rates between 4% and 5% into 2022 Q3, while premium Class A office space had a 9.4% vacancy. The Midtown market, which usually trails Downtown, had vacancy hold steady at 14.1% between Q2 and Q3 in 2022.

2 The OPA and Rezoning application for 325 Front Street West was approved by Council on July 22, 2022, after the timeframe of this five-and-a-half-year Pipeline.

There may be increased restraint in new office construction into the future due to a threat of recession, a slowing economy, rising interest rates, inflation, slow return to office rates, constrained labour markets, supply chain issues and rising construction costs.²⁵ However, as of 2022 Q3, belief in the office asset class has been holding steadfast despite the aforementioned

headwinds, with positive momentum in investor confidence indicated by the \$2.9 billion in total investment in the first half of the 2022 year.²⁶

Table 14: Projects Proposing ≥100,000 Square Metres of Non-Residential GFA

	Project Location	Proposed Non-Residential GFA	Percent
City of Toronto		14,484,961	100.0%
Proposed Non-Residential GFA ≥100,000 m2		4,172,126	28.8%
<i>Built Projects</i>		476,357	11.4%
45 BAY ST	Downtown and Central Waterfront	143,196	3.4%
6351 STEELES AVE E	All Other Areas	128,743	3.1%
2233 SHEPPARD AVE W	All Other Areas	102,991	2.5%
120 BREMNER BLVD	Downtown and Central Waterfront	101,427	2.4%
<i>Active Projects</i>		1,854,800	44.5%
21 DON VALLEY PKWY	All Other Areas	925,314	22.2%
82 BUTTONWOOD AVE	All Other Areas	168,845	4.0%
25 KING ST W	Downtown and Central Waterfront	163,201	3.9%
141 BAY ST	Downtown and Central Waterfront	127,816	3.1%
30 BAY ST	Downtown and Central Waterfront	123,854	3.0%
171 FRONT ST W	Downtown and Central Waterfront	123,495	3.0%
156 FRONT ST W	Downtown and Central Waterfront	115,515	2.8%
555 REXDALE BLVD	All Other Areas	106,760	2.6%
<i>Projects Under Review</i>		1,840,969	44.1%
123 GARRATT BLVD	All Other Areas	1,114,000	26.7%
325 FRONT ST W	Downtown and Central Waterfront	273,592	6.6%
2150 LAKE SHORE BLVD W	All Other Areas	116,877	2.8%
25 THE WEST MALL	Other Mixed Use Areas	114,702	2.7%
1 YONGE ST (Phases 4 and 5)	Downtown and Central Waterfront	111,302	2.7%
40 RAKELY CRT	All Other Areas	110,496	2.6%
Proposed Non-Res GFA between 50,000 m2 and 99,999 m2		2,182,658	15.1%
Proposed Non-Res GFA between 10,000 m2 and 49,999 m2		5,333,320	36.8%
Proposed Non-Res GFA less than 10,000 m2		2,796,857	19.3%

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

Development projects with activity between January 1, 2017 and June 30, 2022. 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.

The City of Toronto and the Provincial Growth Plan

Citywide Growth Plan Forecast

It is important to understand Toronto's growth in the context of its population and employment. *A Place to Grow: Growth Plan for the Greater Golden Horseshoe* (2019) was brought into effect on May 16th, 2019 by the Province. It manages growth and development throughout the region that stretches around Lake Ontario from Niagara Falls to Peterborough, with Toronto at its centre. On August 28th, 2020, the Province released the amended *A Place to Grow*. The amended Growth Plan eliminates the 2031 and 2041 forecast years, replacing them with forecasts at 2051.

The underlying technical forecast study to Amendment 1 was prepared by Hemson Consulting Ltd. and released in August 2020. The 2051 forecasts in the amended Growth Plan correspond to the Reference Scenario in the 2020 technical forecast study. That Scenario has a 2016 population of 2,819,000 and a 2021 forecast population of 3,034,000.

The continuation of the recent growth trends are uncertain due to the COVID-19 pandemic, which has been factored into the 2020 Hemson technical background study supporting the Growth Plan as amended. The study notes that its forecasts were originally premised on the population of the Greater Golden Horseshoe being consistent with the Ministry of Finance Population Projections through the forecast period. However, the study states that the proposed population forecasts were revised with a reduction of approximately 13% growth over the 2016 – 2021 period and a corresponding decline of 15% in GGH employment in 2020 Q2, with about three-quarters of the job losses anticipated to be recovered by 2021 Census Day. The study states that the long-term effects of the pandemic are very uncertain.²⁷

According to the results of the 2021 Toronto Employment Survey, the City saw a slight increase in employment from 2020 of 1,610 jobs or 0.1%, following a decline in employment of 7.6% or 119,890 jobs between 2019 and 2020.^{28,29} Altogether, this was a little over a half of the anticipated regional decline in 2020 and outperforms the expectations of the forecasts supporting the Growth Plan 2020. While the rebound in 2021 did not materialize as anticipated as a result of the ongoing nature of the pandemic and further lockdowns throughout the year, by April 2022, lockdowns, capacity limits and other restrictions had been lifted, allowing businesses to reopen at their full capacities. However, the pandemic is still running its course, and the recovery process varies across areas and sectors. While some of the hardest hit sectors have started to rebound from the pandemic effects, the tightening labour market has made their recovery challenging. The dire shortage of workers in some sectors reflects a migration of workers between sectors, for example, from jobs in the service and food industries to potentially more lucrative positions in more stable sectors.³⁰

Through the Census, Statistics Canada attempts to count every person. However, some people are missed, and a few are counted more than once. Statistics Canada undertakes follow-up studies to estimate the net undercoverage rate of the Census. Statistics Canada's estimate of the Toronto's population as of July 1st, 2021 is 2,955,861, as estimated in January 2023, which is about 2.6%, or about 78,100 persons below the revised forecast. While the City was on track with the forecasts supporting *A Place to Grow* as amended, disruptions caused by the COVID-19 pandemic have impacted the short term growth in population, most notably as a result of more limited international migration which is a large driver of the City's population growth. Nevertheless, Hemson Consulting Ltd. anticipated that the fundamental growth patterns of

the region would reassert themselves in three years' time. As of 2022, the City's population is over 3 million people for the first time. According to Statistics Canada, Toronto's estimated population as of July 1st, 2022 is 3,025,647. This is population growth of almost 70,000 people in a single year.

Employment Forecast

A Place to Grow, as amended on August 28th, 2020, contains a new forecast horizon of 2051 and a forecast of 1,980,000 jobs by that year. The intervening forecast years were removed from the Growth Plan. The Reference Scenario in the technical forecast study supporting the amended Schedule 3 forecast suggests an average annual growth rate of 10,629 jobs per annum from 2016 to 2051.

Each year for the past 40 years, the City Planning Division has conducted the Toronto Employment Survey, collecting employment information from every business establishment in the city. As an establishment based-survey, the Toronto Employment Survey does not capture all people working at home or from home, nor all of those who do not have usual places of work, such as construction workers. Thus, the total employment in the city is higher than reported by the Survey.

According to the results of the Toronto Employment Survey, over the “pre-pandemic” ten-year period 2009 to 2019, the City’s employment grew by 27,661 jobs per annum. This is 2.6 times the rate of growth anticipated by the forecasts supporting the Growth Plan. Over the ten-year period 2011 to 2021 ending “mid-pandemic”, Toronto’s employment grew by 13,422 jobs per annum, or 1.3 times the rate of growth anticipated by the Growth Plan forecasts. To date, the City is still growing faster than forecast and remains on track to achieve the Growth Plan forecast before 2051.³¹

The medium- and long-term impacts of the COVID-19 pandemic are not yet known. The study supporting the revised forecasts in the amended Growth Plan states that the forecasts incorporate a severe economic contraction in 2020 while anticipating a return to pre-pandemic expectations within three years. Nevertheless, the study observes that the pandemic has the potential to affect the assumptions of the forecast, requiring ongoing monitoring. While 2022 experienced a strong labour market, as of 2022 Q3, economists from the Royal Bank of Canada and elsewhere predict a recession in the first half of 2023, which could result in lower, or negative, employment growth for the year.³²

Housing Forecast

Toronto's housing growth is also on track with the household forecasts supporting *A Place to Grow* as amended in 2020. The Growth Plan as amended is supported by a technical forecast study by Hemson Consulting Ltd also completed in 2020. The Reference Forecast of that study anticipates 495,000 households need to be accommodated over the forty-year period from 2011 to 2051.

In order to accommodate the additional households, more housing must be built. To realize this growth, some existing housing may need to be demolished. Based on an analysis of Demolition Permits over the 16-year period 2005-2020, the overall average annual demolition rate versus housing units completed over the same period as reported by CMHC was 8.9% (see pages 9-10). The demolition rate can be applied to the potential housing supply to estimate the net supply (see Table 15).

Just ten-and-a-half years into the forty-year forecast period, Toronto has built or has had proposed more than enough potential housing less estimated demolitions to accommodate the forecasted growth to

2051. The total potential housing supply of units built, approved and still under review since 2011 is over 800,000 residential units. CMHC reports that 186,359 units were completed between May 2011 and June 30, 2022 for a net total of 169,773 units. The Development Pipeline contains 203,793 units in projects with their first Planning approval but not yet built. If realized, the estimated new supply after accounting for demolitions would be 185,655 units. Together this is 72% of the net units required to accommodate the forecasted growth over forty years. A further 409,896 units are in development projects still under review for an estimated added net new supply of 373,415 units or a further 75% of the forecasted growth. Together this represents 147% of the units required to accommodate the forecasted household growth to 2051 (see Figure 7 on page 43). Not all submitted proposals are approved, and not all approved projects are built. Further, the City does not have any influence on the timing of when an applicant advances a Planning approval by submitting Building Permit applications or advancing construction. However, given these trends, there is more than enough supply in the Pipeline to accommodate the forecasted growth, and

Table 15: Growth Plan Forecast

		Potential Supply (Units)	%	Potential Supply Less Estimated Demolitions	%
Hemson Forecast	2011 - 2051	495,800	100.0%	495,800	100.0%
CMHC Completions	2011 - June 30, 2022	186,359	37.6%	169,773	34.2%
Active Units	2017 - June 30, 2022	203,793	41.1%	185,655	37.4%
	<i>First Planning Approval</i>	108,084	21.8%	98,465	19.9%
	<i>Final Planning Approval (NOAC)</i>	95,709	19.3%	87,191	17.6%
Under Review Units	2017 - June 30, 2022	409,896	82.7%	373,415	75.3%
Total Units		800,048	161.4%	728,844	147.0%
Additional Potential / Shortfall		304,248	61.4%	233,044	47.0%

Source: City of Toronto, City Planning Division: Integrated Business Management System; Land Use Information System II; Canada Mortgage and Housing Corporation; Housing Now, GTA Edition tables.

Based on development projects with activity between January 1, 2017 and June 30, 2022 less estimated demolitions using a demolition rate of 8.9% based on Demolition Permits issued 2005-2020 versus CMHC Completions over the same period. 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, but are not yet built. Projects Under Review are those which have not yet been approved or refused and those which are under appeal.

Toronto is well on its way to housing the population forecasted by A Place to Grow as amended.

Potential Population

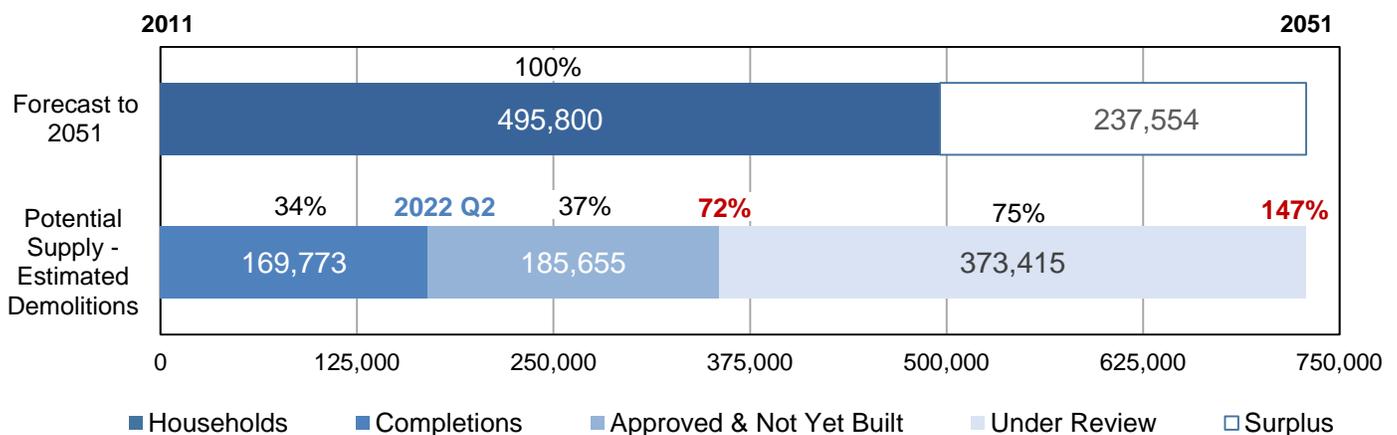
There are 185,655 net units which are approved but not yet built in the Development Pipeline after accounting for estimated demolitions to realize them. If these units were completed and occupied at the average number of persons per household of units built in the twenty years between 1996 and 2016, the potential population in these units could be about 403,000 people. In addition to Statistics Canada’s 2021 population estimate for the city of 2,955,861, this could bring the city’s population to 3.36 million or 92.0% of the forecasted population at 2051. If the 373,415 net new units which were still under review as of June 30, 2022 were also approved, built and similarly occupied (already having accounted for estimated demolitions), the potential population in these additional units could be about 810,000 people.

In total, the Development Pipeline could represent a potential population of 1,213,000 people. This would be the equivalent of growing Toronto’s population by over 40%. Added to the 2021 population, the Pipeline would contribute to a city population of about 4.17 million or 114% of the 2051 population forecast of 3.65 million contained in the Provincial Growth Plan as amended.

Density of Jobs and People in Growth Areas

Toronto’s Official Plan directs major growth to the Centres and Downtown “in order to promote mixed use development to increase opportunities for living close to work and to encourage walking and cycling for local trips.” The respective Secondary Plans identify each area as an Urban Growth Centre. The Provincial Growth Plan sets minimum gross density targets to be achieved by 2031 for Urban Growth Centres (UGC’s). The minimum gross density target is 400 residents and jobs combined per hectare for each Centre and for Downtown.

Figure 7: Growth Plan Forecast to 2051



Sources: City of Toronto, City Planning : Integrated Business Management System; Land Use Information System II; Canada Mortgage and Housing Corporation: Housing Now, GTA Edition tables.

Based on development projects with activity between January 1, 2017 and June 30, 2022 less estimated demolitions using a demolition rate of 8.9% based on Demolition Permits issued 2005-2020 versus CMHC Completions over the same period. 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, but are not yet built. Projects under review are those which have not yet been approved or refused and those which are under appeal.

Table 16 shows the density of people and jobs per hectare for Downtown and each Centre between 2006 and 2021, and for the city overall. Since 2006, each of these areas has become steadily denser. North York Centre and Yonge-Eglinton Centre have achieved the 400 people and jobs per hectare target, as early as 2006 in the case of Yonge-Eglinton Centre. Scarborough Centre is the only Centre that saw a decrease in density between 2016 and 2021. However, staff are currently updating the Centre's Secondary Plan framework in order to manage its development and new transit infrastructure. Although not yet finalized or approved, the demonstration

scenario presented by the City's consultant in March 2022 is stated to result in a total density of 539 people and jobs per hectare, well above the required minimum.³³ Further, seven of the 17 largest projects proposed in the Centres are located in Scarborough, which indicates a positive outlook for the area.

Growth slowed in all Centres and the Downtown between 2016 and 2021 compared to the period between 2006 and 2021 due to the impacts of the COVID-19 pandemic. Nevertheless, Table 16 also shows that Downtown and the Centres have intensified in comparison to the city overall, as the Growth Plan has directed.

Table 16: Density of People and Jobs Per Hectare in Urban Growth Centres

Measure	Density (People and Jobs Per Hectare)				Percent Change in Density	Percent Change in Density
	2006	2011	2016	2021	2006-2021	2016-2021
Scenario	Actual	Actual	Actual	Actual	Population Change	Population Change
City of Toronto	60	62	66	67	12%	2%
Urban Growth Centres						
Downtown and Central Waterfront	265	302	354	384	45%	8%
Centres	250	288	297	316	26%	6%
Etobicoke Centre	137	144	155	178	30%	15%
North York Centre	385	455	450	457	19%	2%
Scarborough Centre	138	156	169	156	13%	-8%
Yonge-Eglinton Centre	482	570	575	721	50%	25%

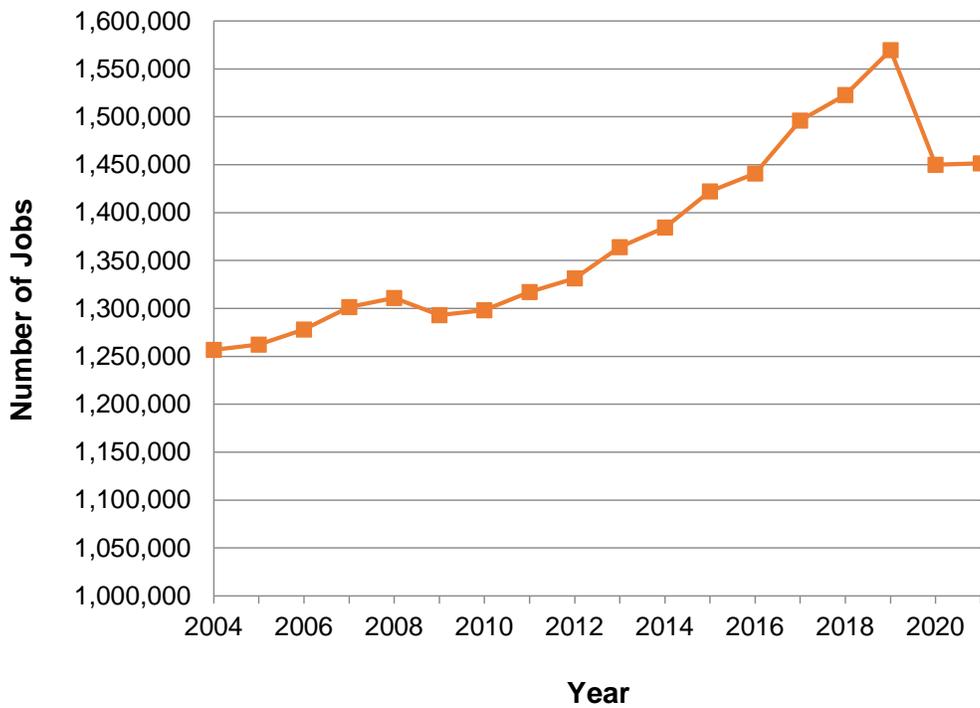
Sources: City Planning, Land Use Information System II. City Planning, Toronto Employment Surveys 2006, 2011, 2016, 2021. Statistics Canada, 2006, 2011, 2016 and 2021 Censuses, custom tabulations.

The 2006, 2011, 2016 and 2021 numbers were calculated based on employment values from the Toronto Employment Survey and population values from the latest Census.

If the overall density trends continue, it is likely that Downtown will exceed the UGC density target well before 2031. The 2021 density of the Downtown UGC area is estimated to be 384 people and jobs per hectare. According to the Census, the Downtown UGC population increased by 28,320 people between 2016 and 2021 or 13.2 persons per hectare. According to the City’s Toronto Employment Survey, the employment increased by 36,330 jobs between 2016 and 2021 (see Figure 8) or 16.9 jobs per hectare. The increase in density as a result of this growth is a minimum of an additional 30.1 people and jobs per hectare over the five-year period from 2016 to 2021, a per annum rate of at

least 6.0 people and jobs per hectare per year. If the current trends continued for another three years after 2021, the additional density would yield a total of 402 people and jobs per hectare in 2024, exceeding the minimum Urban Growth Centre density target well before 2031. The timing of the city’s growth will be affected by its recovery from the impacts of the COVID-19 pandemic.

Figure 8: City of Toronto Employment, 2004-2021



The City of Toronto and the Provincial More Homes Built Faster Act, 2022 (Bill 23)

Bill 23, the *More Homes Built Faster Act 2022*, was given Royal Assent on November 28th, 2022, and entails extensive changes to the policy-led planning and land development system under which municipalities in Ontario operate. The Province's stated goal for the Bill is to facilitate the construction of 1.5 million new homes, of which 285,000 homes (or 19%) are targeted in Toronto by 2031.³⁴ If the average annual rate of 15,983 units built between 2017 and 2021 continued to 2031, a total of about 160,000 units would be built. The

Housing Target represents a further increase of 78% or 125,000 homes.

CMHC reports that 27,991 units were completed between 2021 and June 30th, 2022 for a net total of 25,500 units. This amounts to 9% of the target. And as noted previously, the Development Pipeline contains 108,084 units in projects with their first Planning approval and 95,709 units in projects with their final Planning approval but not yet built. If realized, the estimated new supply after accounting for demolitions would be 185,655 units. This is 65% of the net units required to accommodate the targeted growth over the ten-year time period. A further 409,896 units are in development projects still under review

Table 17: 2031 Municipal Housing Target

		Potential Supply (Units)	%	Potential Supply Less Estimated Demolitions	%
Bill 23 Housing Pledge	2021 - 2031	285,000	100.0%	285,000	100.0%
CMHC Completions	2021 - June 30, 2022	27,991	9.8%	25,500	8.9%
Active Units	2017 - June 30, 2022	203,793	71.5%	185,655	65.1%
<i>First Planning Approval</i>		108,084	37.9%	98,465	34.5%
<i>Final Planning Approval (NOAC)</i>		95,709	33.6%	87,191	30.6%
Under Review Units	2017 - June 30, 2022	409,896	143.8%	373,415	131.0%
Total Units		641,680	225.2%	584,570	205.1%
Additional Potential / Shortfall		356,680	125.2%	299,570	105.1%

Source: City of Toronto, City Planning Division: Integrated Business Management System; Land Use Information System II; Canada Mortgage and Housing Corporation; Housing Now, GTA Edition tables.

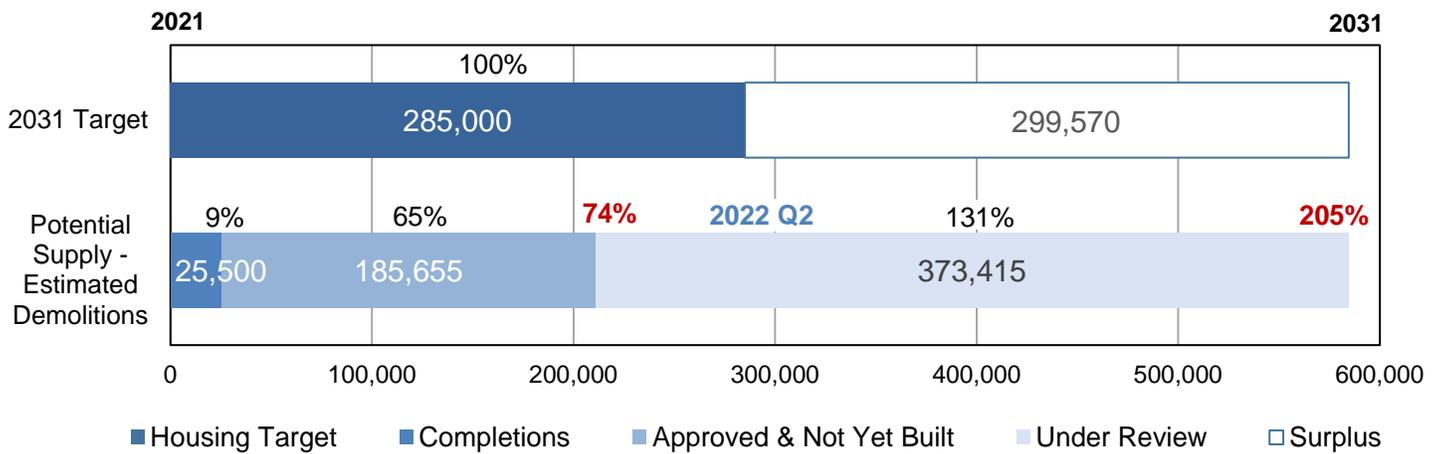
Based on development projects with activity between January 1, 2017 and June 30, 2022 less estimated demolitions using a demolition rate of 8.9% based on Demolition Permits issued 2005-2020 versus CMHC Completions over the same period. Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or those which are under construction, but are not yet built. Projects Under Review are those which have not yet been approved or refused and those which are under appeal.

for an estimated added net new supply of 373,415 units or a further 131% of the targeted growth. Altogether this represents 205% of the units required to accommodate the housing target set for Toronto to 2031 (see Figure 9 on page 47). Not all submitted proposals are approved, and not all approved projects are built, nor may be built in the given time frame.

As discussed in elsewhere in this Bulletin, about 54% of units with their first Planning approval over the five-year period between 2017 and 2021 have been built, and about 70% of units with the final Planning approval have been built. If a similar proportion of 54% of the current Pipeline was built by 2031, about

315,700 units would be constructed. Allowing for an estimated demolition rate of 8.9% to realize the potential housing, the current Pipeline could yield 287,600 net new units, which is above the Housing Target. Meanwhile, additional proposals will be received. There is enough potential within the development pipeline to meet the new targets as set out by the *More Homes Built Faster Act*. Achieving the target will depend on the timing and delivery of these units.

Figure 9: 2031 Municipal Housing Target



Sources: City of Toronto, City Planning : Integrated Business Management System; Land Use Information System II; Canada Mortgage and Housing Corporation: Housing Now, GTA Edition tables.

Based on development projects with activity between January 1, 2017 and June 30, 2022 less estimated demolitions using a demolition rate of 8.9% based on Demolition Permits issued 2005-2020 versus CMHC Completions over the same period. 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, but are not yet built. Projects under review are those which have not yet been approved or refused and those which are under appeal.

Approved and Built Units by Year

As the average size of development projects increases, so does the magnitude of development approved by Toronto City Council. Over the five-and-a-half years from 2017 to June 30, 2022, Council has consistently approved more residential units than were built (see Table 18). A surge of projects was submitted in late 2021 and early 2022, presumably in advance of the anticipated implementation of Inclusionary Zoning policies, and as of June 30th, 2022, City Planning had approved more units than in 2021 – a demonstration of the volume and size of development projects processed by the City. These units were approved through any of the following Planning

Applications: Official Plan Amendment, Zoning By-law Amendment, Plan of Subdivision, Plan of Condominium or Site Plan Control.

City Council approved an average of 29,726 residential units per year between 2017 and 2021, while 15,983 units on average were built annually. This is a surplus of 13,743 units on average or a total of 186% of the average annual production through the Pipeline. If realized, this surplus helps to ensure a steady supply of approved housing will be available for construction and eventual occupancy.

Projects can apply for Building Permits once they have received a final Planning approval, in the form of a Notice of Approval Conditions (NOAC) for a Site Plan Control application. Considering

only those projects that have received a NOAC, the City approved an average of 22,823 residential units per year between 2017 and 2021. This is a surplus of 6,840 on average or a total of 143% of the average annual production through the Pipeline.

For development projects with activity between January 1st, 2017 and June 30th, 2022, less than half of the units that have received any Planning approval have been built, and only about two-thirds of units which have received final Planning approval have been built.

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 18: Residential Units Approved and Built by Year, 2017 to June 30, 2022

Year	Units Approved (First Approval)	Units Approved (Final Approval)	Units Built
2017	25,319	17,134	10,130
2018	36,526	30,716	14,944
2019	34,400	22,062	14,689
2020	24,737	23,278	22,266
2021	27,648	20,925	17,886
January 1, 2022 - June 30, 2022	41,829	16,258	7,832
Total	190,459	130,373	87,747
5 Year Average (2017-2021)	29,726	22,823	15,983

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

Proposed residential units in development projects with activity between January 1, 2017 and June 30, 2022. Units approved (first approval) are units in projects that received their first planning approval in the year listed, in the form of a Rezoning, Official Plan Amendment approval, or Notice of Approval Conditions (NOAC) for a Site Plan Application. Units approved (final approval) are units in projects that received NOAC for a Site Plan Application 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 27, as some projects became ready for occupancy before 2017 but had other development activity (such as an application for a Draft Plan of Condominium) during the pipeline window of January 1, 2017 to June 30, 2022. These figures are different than those in Tables 6 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.

Purpose-Built Rental Unit Analysis

A mix of tenures is an important element for a housing market that meets the needs of a diverse city like Toronto. While condominium units continue to be the predominant tenure for proposed residential units in the Pipeline, the number of proposed purpose-built rental units is increasing.

The Development Pipeline does include the intended tenure for a project, however, the intended tenure may change by the end of the development process. As such, the numbers of proposed purpose-built rental units for Active and Under Review projects are subject to change. It should also be noted that while the Development Pipeline tracks purpose-built rental units through the City's development approvals process, it does not capture the secondary rental market.

Within the 2022 Q2 Development Pipeline, 21% (506) of the projects are proposing purpose-built rental

units, accounting for 16% of the total proposed residential units or 113,005 units (see Table 19). The number of proposed purpose-built rental units has generally been increasing over the last five-and-a-half years, and between 2020 and 2021 there was notable increase of 71% in the number of proposed purpose-built rental units. The increasing number of purpose-built rental units within the Development Pipeline is an encouraging sign that rental is once again becoming an attractive tenure for the development industry.

Low vacancy and high rents may explain the industry's shifting interest in purpose-built rental. The vacancy rate for purpose-built rental projects completed since 2005 in the GTA declined to 1.4% in 2022 Q2 compared to 5.1% in 2021 Q2 and a pandemic high of 6.4% in 2021 Q1.³⁵ Pre-pandemic GTA rental vacancy was at 0.9% in 2019 Q4, indicating that rental vacancy rates are returning to pre-pandemic lows.³⁶ With strong demand and limited supply, Toronto rents have

Table 19: Proposed Purpose-Built Rental Units by Submission Year

Year	Number of Projects	Proposed Purpose Built Rental Units
2016 and Earlier	180	33,026
2017	31	5,500
2018	39	7,593
2019	51	16,400
2020	68	15,698
2021	91	26,800
2022	46	7,988
Total	506	113,005

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

Development projects with activity between January 1, 2017 and June 30, 2022. 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.

reached new highs. As of October 2022, the average rent for a one-bedroom apartment or condo was \$2,502 and the average rent for a two-bedroom apartment unit was \$3,353.³⁷ While the Pipeline suggests a future increase in the supply of purpose-built rentals, increasing construction costs, rising borrowing costs and tighter lending conditions may threaten the ability to adequately meet demand.³⁸

Similar to the overall 2022 Q2 Pipeline, the majority of purpose-built rental development is located in Growth

Management Areas of the Official Plan (see Tables 20 and 21, and Map 9). There are about 10% more projects proposing purpose-built rental located in Growth Areas compared to the Pipeline as a whole, however, there are about 3% fewer proposed purpose-built rental units within the Growth Areas. While the share of proposed purpose-built rental units in the Growth Areas is slightly smaller, there is a larger proportion of purpose-built rental units proposed along the Avenues compared to the Pipeline as a whole.

Table 20: Proposed Purpose-Built Rental Projects in City of Toronto by Status

	Built	Active	Under Review	Total in Pipeline	% of Total	% of Growth Areas
City of Toronto	76	184	246	506	100%	
Growth Areas	57	136	180	373	74%	100%
Downtown and Central Waterfront	18	55	45	118	23%	32%
Centres	9	15	14	38	8%	10%
Avenues	21	43	97	161	32%	43%
Other Mixed Use Areas	9	23	24	56	11%	15%
All Other Areas	19	48	66	133	26%	

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

Development projects with activity between January 1, 2017 and June 30, 2022. 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.

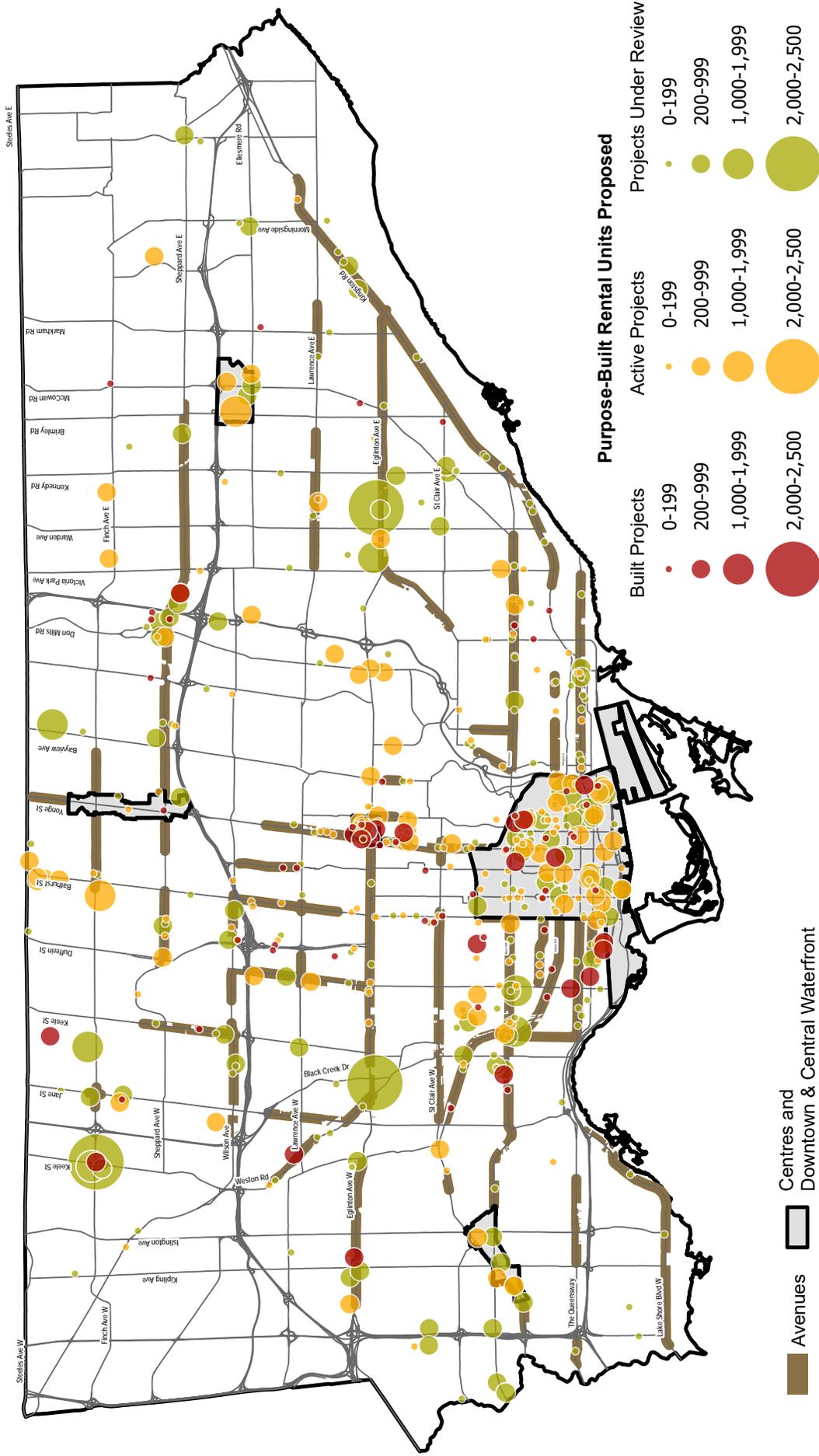
Table 21: Proposed Purpose-Built Rental Units in City of Toronto by Status

	Built	Active	Under Review	Total in Pipeline	% of Total	% of Growth Areas
City of Toronto	12,181	41,164	59,660	113,005	100%	
Growth Areas	9,831	30,744	46,285	86,860	77%	100%
Downtown and Central Waterfront	2,969	13,068	11,088	27,125	24%	31%
Centres	1,755	5,318	4,148	11,221	10%	13%
Avenues	3,062	6,987	21,742	31,791	28%	37%
Other Mixed Use Areas	2,045	5,371	9,307	16,723	15%	19%
All Other Areas	2,350	10,420	13,375	26,145	23%	

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

Proposed residential units in development projects with activity between January 1, 2017 and June 30, 2022. 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 9: Proposed Purpose-Built Rental Development



Source: Land Use Information System II
 Development projects with activity between January 1, 2017 and June 30, 2022. 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.

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As previously discussed, some development projects require the demolition of existing structures to realize the proposed development. The City's Official Plan policies (3.2.1.6 and 3.2.1.11) protect against the demolition of affordable and mid-range rental housing without replacement, as well as the conversion of rental housing to condominium tenure, through the Planning approvals process where at least six rental dwelling units are being demolished or converted. The City regulates the demolition and conversion of rental housing through Chapter 667 of the Toronto Municipal Code, the City's Rental Housing Demolition and Conversion Control By-law, which requires anyone proposing to demolish or convert any part of a rental property containing six or more dwelling units to apply to the City for a Rental Housing Demolition and Conversion Permit. Together, Chapter 667 and the City's Official Plan housing policies aim to

sustain Toronto's rental housing stock by requiring demolished rental units be replaced by same number of units at similar rents.

To estimate the number of net new units, the existing units can be subtracted from a project's total unit count. The recording of existing units was only introduced in 2018, therefore the number of existing units associated with projects, particularly Built projects, may not be accurate prior to 2018. As mentioned at the beginning of the bulletin, the development pipeline only captures projects that require planning approval, thus the figures exclude purpose-built rental units from smaller projects that do not require a Planning application. Any estimate of net new units must be cautiously interpreted.

The 506 projects proposing purpose-built rental units contain 40,038 existing rental units (see Table 22). The majority (81%) of these existing

rental units are intended to be retained and approximately 7,682 rental units are proposed to be demolished. If all projects in the 2022 Q2 Pipeline proposing purpose-built rental units were realized there would be approximately 105,323 net new purpose-built rental units.

The Provincial government introduced Bill 23, or the *More Homes Built Faster Act*, October 25th, 2022 to address Ontario's housing crisis and support the building of 1.5 million homes over the next 10 years. Bill 23 made changes to Section 111 of the *City of Toronto Act* to allow the Minister to make regulations imposing limitations and conditions on the City's ability to prohibit and regulate the demolition and conversion of residential rental properties. At the time of writing no regulation has been issued and the City continues to apply its existing rental replacement policies.

Table 22: Net New Purpose-Built Rental Units in City of Toronto by Status

	Existing Rental Units	Retained Rental Units	Proposed Rental Units	Total Units	Approximate Net New Units
City of Toronto	40,038	32,356	113,005	145,361	11,572
Under Review	18,307	14,256	59,660	73,916	55,609
Active	15,403	12,381	41,164	53,545	38,142
Built	6,328	5,719	12,181	17,900	11,572

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

Development projects with activity between January 1, 2017 and June 30, 2022. 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.

City-led Housing Related Initiatives

While Toronto has boomed in recent years, the city continues to experience a housing crisis, particularly among lower and moderate-income residents for whom rental and ownership costs have surpassed affordability levels. Despite the approval of nearly 400,000 homes in the last 10 years³⁹ and a multitude of initiatives by the City, affordability has worsened over that time. In recognition, the City of Toronto is currently undertaking a range of actions across the housing spectrum to address vast and growing housing needs, including but not limited to land use and planning interventions as discussed here.

Between 2017 and June 30th, 2022, an average of 34,629 residential units were approved per year, while an average of only 16,235 were completed annually. Simply building a large supply of housing has not been sufficient to address Toronto's diverse housing needs, particularly when larger units have historically been in short supply. City Planning's May 2020 bulletin, *Condominiums: Two Decades of New Housing* shows that from 2002 to 2018, two- and three-bedroom units represented 32% and 4% (respectively) of the total of 186,094 condominium units registered in Toronto.⁴⁰ Some newer planning initiatives may prove to address the problem more directly. **Several newly-adopted Secondary Plans require a certain number of two-or-more-bedroom units** to be built in new developments within their geographies. In 2020, City Council adopted the final **Growing Up: Planning for Children in New Vertical Communities Urban Design Guidelines**, which encourage private developers to build family-friendly units.⁴¹

The HousingTO 2020-2030 Action Plan is the City's blueprint for action across the full housing spectrum to address the City's vast and growing housing needs.⁴² It provides a high level summary of programs, including:

- The establishment of a pipeline to support the creation of 40,000 affordable rental and supportive homes through a public/private/non-profit land banking strategy, including 18,000 supportive homes;
- A variety of initiatives to prevent homelessness and ensure access to affordable and secure rents in well-maintained units, including support for the creation of new **long-term care beds**; the **Tower Renewal and High-Rise Retrofit Improvement Support Program (Hi-RIS)**; the **TCH state of good repair plan**; extensions of the **Open Door Affordable Housing Program** to 2030; redefining "affordable" housing in Toronto based on income (the definition was approved in 2021); and a new **Vacant Home Tax (VHT)** that will be levied on Toronto properties deemed vacant under by-law 97-2022.
- A range of initiatives to support homeowners, including **property tax relief** and **home repair assistance**; the first-time **Municipal Land Transfer Tax Rebate Program**; and the **Basement Flooding Subsidy program**; and
- Direction to encourage new housing supply, such as through the **redevelopment of surplus municipal lands** and of areas such as the Waterfront and Port Lands, and the non-profit home ownership **Development Charge Deferral program**.

On December 7th, 2022, Mayor John Tory wrote a letter to council recommending they direct the City Manager to develop a **2023 Housing Action Plan** for the 2022-2026 term. The letter sets out a variety of items that would enable market, non-market and hybrid housing production in order to achieve or exceed the provincial target of 285,000 new homes over the next 10 years. The recommendations include Official Plan policy and regulatory components to increase zoning permissions throughout the city; additional capacity to relevant sectors, including co-op and non-profit housing operators, the construction market, School boards, and post-secondary institutions; the development of a publicly available database to track progress of affordable rental units; and approval of the **Multi-tenant Houses** regulatory framework originally considered by City Council in June 2021.⁴³

As a non-profit owned by the City, Toronto Community Housing (TCH) is the largest social housing provider in Canada and the second largest in North America.⁴⁴ TCH is the principal developer for the revitalization of six communities (Regent Park, Lawrence Heights, Alexandra Park, Allenbury Gardens, 250 Davenport and Leslie Nymark) that will include 4,500 replaced or renovated Rent-Geared-to-Income rental units and 12,500 new market-rate condominiums.

The City's **Housing Now Initiative**⁴⁵ will develop City-owned sites for affordable housing within mixed-income, mixed-use, transit-oriented communities. At the time of reporting, Phases One, Two, and Three are expected to deliver up to 14,880 new residential units, including up to 4,920 affordable rental homes, on 21 sites across the city.

Inclusionary Zoning⁴⁶ is a policy and zoning framework that requires a certain percentage of affordable housing gross floor area in new residential developments, creating mixed-income housing. The Province has yet to release its Regulations related to the updated IZ Provincial Policy framework introduced by Bill 23.

The **Modular Housing Initiative** aims to alleviate the most urgent symptom of the housing crisis, homelessness. City Council has approved the construction of the first 250 modular homes on City-owned sites in 2020 and 2021. The first three modular buildings are already completed and an additional project is nearing completion. The on-site construction of the final project is on hold until the appeal process of the zoning by-law is complete.

Expanding Housing Options in Neighbourhoods is a City of Toronto initiative to facilitate more low-rise housing in residential neighbourhoods to meet the needs of our growing city.⁴⁷ The City is working to expand opportunities for “missing middle” housing forms in Toronto, ranging from duplexes to low-rise walk-up apartments.

Secondary Suites, Laneway Suites, and Garden Suites are permitted as-of-right under zoning by-laws 549-2019 and 569-2013.^{48,49} These forms of housing could add to the supply of highly-desired low-rise housing in the city, and might help households shift to their right-size by dividing their dwellings into two smaller units or help those who want to age in place to remain in their neighbourhood.

In December 2017 and January 2018, City Council approved the **regulation of short-term rentals** in Toronto. The by-law amendments restrict short-term rentals to a host's primary private residence only. These restrictions may cause some hosts to return some units to the market, especially for those hosts who have multiple short-term rental units.

Regulation of Rental Housing Demolitions and Conversions has been in place since 2006. The City's Official Plan contains policies protect against the demolition or conversion of rental housing without replacement by requiring that projects proposing to demolish or convert a rental property containing six or more dwelling units apply for a Rental Housing Demolition and Conversion Permit.

Concept 2 Keys (C2K) was created to implement improvements to the City's development review process. From pre-application consultation to occupancy, the C2K program fosters collaboration between City divisions and between development applicants and City staff to enable a more effective and efficient review process, prioritizing and expediting affordable housing projects.

In Toronto's context, governments generally do not actually construct market housing themselves (with certain programmatic exceptions), and cannot control supply chain, labour market, interest rates and many other factors that create the conditions for increases in supply. As evidenced by the aforementioned array of initiatives and area plans in place, the City of Toronto is enabling, facilitating, and pulling as many levers as possible to support housing production that addresses a variety of housing needs, all through the lens of building complete communities and the infrastructure necessary to support livability, inclusion, sustainability and prosperity.

City Planning will continue to monitor Toronto's housing supply and its impacts on Toronto households.

Appendix

Table A.1: Proposed Projects in City of Toronto by Status, 5 Year Comparison 2017 - 2021

	Built	Active	Under Review	Total in Pipeline	% of Total
City of Toronto	622	878	774	2,281	100.0%
Growth Areas	394	548	526	1,475	64.7%
Downtown and Central Waterfront	142	204	156	502	22.0%
Centres	30	47	41	125	5.5%
Avenues	149	210	237	596	26.1%
Other Mixed Use Areas	73	87	92	252	11.0%
All Other Areas	228	330	248	806	35.3%

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

Development projects with activity between January 1, 2017 and December 31, 2021. 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 A.2: Proposed Residential Units in City of Toronto by Status, 5 Year Comparison 2017 - 2021

	Built	Active	Under Review	Total in Pipeline	% of Total	% of Growth Areas
City of Toronto	103,638	207,755	359,568	670,961	100.0%	
Growth Areas	92,249	180,998	264,846	538,093	80.2%	100.0%
Downtown and Central Waterfront	43,513	67,999	53,225	164,737	24.6%	30.6%
Centres	10,891	25,944	42,568	79,403	11.8%	14.8%
Avenues	22,848	43,102	88,728	154,678	23.1%	28.7%
Other Mixed Use Areas	14,997	43,953	80,325	139,275	20.8%	25.9%
All Other Areas	11,389	26,757	94,722	132,868	19.8%	

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

Development projects with activity between January 1, 2017 and December 31, 2021. 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 A.3: Proposed Non-Residential GFA in City of Toronto by Status, 5 Year Comparison 2017 - 2021

	Built	Active	Under Review	Total in Pipeline	% of Total	% of Growth Areas
City of Toronto	3,087,319	5,637,939	5,225,231	13,950,489	100.0%	
Growth Areas	1,951,704	3,014,665	2,688,272	7,654,640	54.9%	100.0%
Downtown and Central Waterfront	1,493,950	2,123,441	1,034,827	4,652,217	33.3%	60.8%
Centres	52,390	232,271	242,947	527,608	3.8%	6.9%
Avenues	209,078	310,391	625,895	1,145,364	8.2%	15.0%
Other Mixed Use Areas	196,286	348,562	784,603	1,329,451	9.5%	17.4%
All Other Areas	1,135,615	2,623,275	2,536,959	6,295,849	45.1%	

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

Proposed non-residential GFA in development projects with activity between January 1, 2017 and December 31, 2021. 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.

Table A.4: Average Project and Unit Size by Year Submitted

Year	Average # of Units Per Project	Average Unit Size (sqm)
2011	313	71
2012	225	76
2013	182	83
2014	144	81
2015	183	75
2016	262	78
2017	234	75
2018	177	76
2019	310	75
2020	323	75
2021	586	57

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

Development projects with activity between January 1, 2017 and June 30, 2022.

Table A.5: Residential Unit Completions by Dwelling Type

Year	Single	Semi	Row	Apartment & Other	Total
2006	1,148	221	1,027	10,024	12,420
2007	1,085	142	552	5,007	6,786
2008	1,008	178	944	11,320	13,450
2009	987	408	919	10,159	12,473
2010	849	166	230	11,843	13,088
2011	865	82	558	15,345	16,850
2012	877	230	457	11,910	13,474
2013	1,013	172	685	12,672	14,542
2014	1,205	136	456	7,754	9,551
2015	1,124	106	193	29,326	30,749
2016	1,250	108	296	14,373	16,027
2017	1,384	92	577	12,118	14,171
2018	1,039	140	876	14,031	16,086
2019	1,057	66	701	12,769	14,593
2020	1,009	70	124	16,073	17,276
2021	774	66	319	19,111	20,270
January 1, 2022 - June 30, 2022	299	68	210	7,144	7,721
Avg 10 yrs (2012-2021)	1,073	119	468	15,014	16,674
Percentage	6.4%	0.7%	2.8%	90.0%	100%

Source: Housing Now publications, Canada Mortgage and Housing Corporation

Table A.6: Completions by Submarket and by Intended Market

Year	Freehold	Condo	Rental	Total	Condo %
2007	1,524	4,690	572	6,786	69%
2008	2,071	10,058	1,321	13,450	75%
2009	2,231	9,322	920	12,473	75%
2010	1,286	10,923	879	13,088	83%
2011	1,449	14,568	804	16,850	86%
2012	1,528	9,961	1,985	13,474	74%
2013	1,735	11,126	1,681	14,542	77%
2014	1,573	7,777	201	9,551	81%
2015	1,368	28,017	1,364	30,749	91%
2016	1,505	13,428	1,090	16,027	84%
2017	1,849	11,507	815	14,171	81%
2018	1,798	11,816	2,472	16,086	73%
2019	1,559	9,724	3,310	14,593	67%
2020	1,247	13,315	2,714	17,276	77%
2021	1,052	15,994	3,224	20,270	79%
January 1, 2022 - June 30, 2022	502	6,686	533	7,721	87%
Avg 10 yrs (2012-2021)	1,521	13,267	1,886	16,674	80%
Percentage	9%	80%	11%	100%	

Source: Housing Now publications, Canada Mortgage and Housing Corporation

Table A.7: Dwelling Unit Completions and Absorptions by Type, City of Toronto

Freehold				
	Completions	Absorptions	Net Completions	"Unabsorbed" Percentage
2017	1,849	1,813	36	2.0
2018	1,798	1,797	1	0.1
2019	1,559	1,506	53	3.5
2020	1,247	1,259	-12	-1.0
2021	1,052	1,131	-79	-7.0
Total	7,505	7,506	-1	0.0
Condominium				
	Completions	Absorptions	Net Completions	"Unabsorbed" Percentage
2017	11,507	12,257	-750	-6.1
2018	11,816	11,947	-131	-1.1
2019	9,724	9,556	168	1.8
2020	13,315	13,204	111	0.8
2021	15,994	16,073	-79	-0.5
Total	62,356	63,037	-681	-1.1
Purpose-Built Rental				
	Completions	Absorptions	Net Completions	"Unabsorbed" Percentage
2017	815	595	220	37.0
2018	2,472	2,111	361	17.1
2019	3,310	2,788	522	18.7
2020	2,714	2,600	114	4.4
2021	3,224	2,734	490	17.9
Total	12,535	10,828	1,707	15.8

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

Note 1. The data in Appendix Table 1 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 2022 year-to-date data has been excluded.

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

Table A.8a: Proposed Projects in City of Toronto by Status and District

District	Built	Active	Under Review	Total in Pipeline	% of Total
City of Toronto	622	879	912	2,413	100.0%
North	154	213	193	560	23.2%
East	90	115	173	378	15.7%
South	278	408	382	1,068	44.3%
West	100	143	164	407	16.9%

Table A.8b: Proposed Residential Units in City of Toronto by Status and District

District	Built	Active	Under Review	Total in Pipeline	% of Total
City of Toronto	103,638	203,793	409,896	717,327	100.0%
North	15,837	50,276	127,911	194,024	27.0%
East	6,084	27,029	96,875	129,988	18.1%
South	67,212	97,947	120,993	286,152	39.9%
West	14,505	28,541	64,117	107,163	14.9%

Table A.8c: Proposed Non-Residential GFA in City of Toronto by Status and District

District	Built	Active	Under Review	Total in Pipeline	% of Total
City of Toronto	3,087,319	5,483,875	5,913,767	14,484,961	100.0%
North	362,934	696,624	1,839,146	2,898,704	20.0%
East	386,565	347,583	966,718	1,700,866	11.7%
South	1,810,825	3,388,769	2,222,488	7,422,082	51.2%
West	526,995	1,050,899	885,416	2,463,309	17.0%

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

Development projects with activity between January 1, 2017 and June 30, 2022. 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.

Table A.9: Approved and Built Residential Units by Year, 2012 to June 30, 2022

Year	Units Approved (First Approval)	Units Approved (Final Approval)	Units Built
2012	12,631	3,345	995
2013	24,008	10,167	2,885
2014	27,730	12,600	2,249
2015	16,417	7,182	2,172
2016	17,679	20,387	7,252
2017	25,319	17,134	10,130
2018	36,526	30,716	14,944
2019	34,400	22,062	14,689
2020	24,737	23,278	22,266
2021	27,648	20,925	17,886
January 1, 2022 - June 30, 2022	41,829	16,258	7,832
Total	288,924	184,054	103,300
10 Year Average (2012-2021)	24,710	16,780	9,547

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

Proposed residential units in development projects with activity between January 1, 2017 and June 30, 2022. Units approved (first approval) are units in projects that received their first planning approval in the year listed, in the form of a Rezoning, Official Plan Amendment approval, or Notice of Approval Conditions (NOAC) for a Site Plan Application. Units approved (final approval) are units in projects that received NOAC for a Site Plan Application 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 27, as some projects became ready for occupancy before 2012 but had other development activity (such as an application for a Draft Plan of Condominium) during the pipeline window of January 1, 2017 to June 30, 2022. These figures are different than those in Tables 6 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.

Endnotes

- 1 Canada Mortgage and Housing Corporation, Housing Now – Greater Toronto Area Reports and custom tabulations.
- 2 City Council enacted a bylaw to adopt the Downtown Plan Official Plan Amendment on July 27, 2018. OPA 406 includes amendments to Section 2.2.1 and Map 6 of the Toronto Official Plan, a new Downtown and future updates to the existing planning framework for Downtown. Accompanying infrastructure strategies are also available. OPA 406 has been submitted to the Ministry of Municipal Affairs and Housing for review and approval pursuant to Section 26 of the Planning Act. More information about the Downtown Plan is available at www.toronto.ca/tocore.
- 3 City of Toronto, City Planning, Official Plan, Downtown Plan Secondary Plan, Policy 2, 2018, <https://www.toronto.ca/wp-content/uploads/2018/08/966f-city-planning-tocore-opa406-attachment-1-schedule-5-downtown-plan.pdf>.
- 4 City of Toronto, City Planning, Official Plan, Railway Lands East Secondary Plan, Policy 2, 2006.
- 5 City Council adopted the Yonge-Eglinton Official Plan Amendment (OPA 405) with amendments on July 23-27, 2018. City Council also endorsed a Parks and Public Realm Plan and Community Services and Facilities Strategy for Midtown. OPA 405 has been submitted to the Ministry of Municipal Affairs and Housing for review and approval pursuant to Section 26 of the Planning Act. More information about the Downtown Plan is available at www.toronto.ca/planning/yongeeglinton.
- 6 City of Toronto, City Planning, Official Plan, Etobicoke Centre Secondary Plan, 2006.
- 7 City of Toronto, City Planning, Six Points Interchange Reconfiguration Common Questions. <https://www.toronto.ca/community-people/get-involved/public-consultations/infrastructure-projects/six-points-interchange-reconfiguration/>.
- 8 City of Toronto, Christie's Secondary Plan Final Report. <https://www.toronto.ca/legdocs/mmis/2021/ph/bgrd/backgroundfile-165673.pdf>.
- 9 Toronto City Council adopted Official Plan Amendment (OPA) 231 on December 18, 2013 which contains new economic policies and new policies and designations for Employment Areas. See City of Toronto, By-law No. 1714-2013. Updated to Board order issued December 20, 2016, By-Law No. 1714-2013.
- 10 Ontario Ministry of Infrastructure, Growth Plan for the Greater Golden Horseshoe, 2006: Office Consolidation, June 2013, Policy 2.2.6.5.
- 11 For more information about OPA 231, please visit <https://www.toronto.ca/city-government/planning-development/official-plan-guidelines/official-plan/official-plan-review/>.
- 12 Kneebone, Elizabeth (2013) Job Sprawl Stalls: The Great Recession and Metropolitan Employment Location, Brookings Institution.
- 13 Colliers (2022). Greater Toronto Area Industrial Market Report Q2 2022.
- 14 Colliers (2020). Greater Toronto Area Industrial Market Report Q3 2020.
- 15 City of Toronto, City Planning, Toronto Employment Survey, 2021.
- 16 City of Toronto, By-Law No. 1714- 2013. Updated to Board order issued December 20, 2016. See: By-Law No. 1714-2013. The permission for all types of retail uses in General Employment Areas is under appeal.
- 17 Colliers (2022). Toronto Industrial Market Report Q2 2022.
- 18 Colliers (2021). Toronto Industrial Market Report Q1 2021.
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