Our Plan Toronto:
Land Needs Assessment

Planning and Housing Committee
April 27, 2023

Planning Research and Analytics
City Planning Division

Land Needs Assessment

What is a LNA?

- Required by the Growth Plan as part of an MCR
- Determine the total quantity of land needed to accommodate forecasted growth to the Growth Plan horizon
- Toronto is bounded and cannot expand, so all growth is intensification
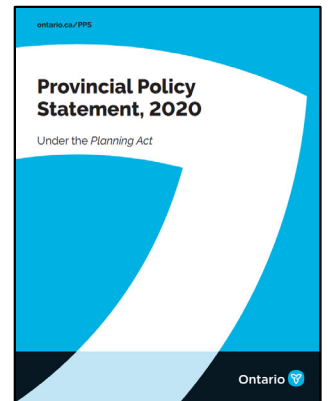
Why is it important to Toronto?

- Informs Employment Policies and Strategic Growth Areas such as MTSAs
- Long-range projections are needed for land use planning, transportation planning and infrastructure needs
- Context for Secondary Plans, the EHON Initiatives and other policies

Key Features

- Community Land Needs, Employment Land Needs
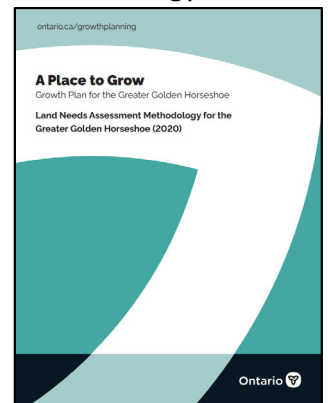- Alternate Growth Scenarios
- Time Frame – to 2051

Policy

Provincial Policy Statement, 2020
Under the *Planning Act*

Plan

A Place to Grow
Growth Plan for the Greater Golden Horseshoe
Office Consolidation 2020
Ontario.ca/growthplanning

Methodology

A Place to Grow
Growth Plan for the Greater Golden Horseshoe
Land Needs Assessment Methodology for the Greater Golden Horseshoe (2020)

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Development Pipeline
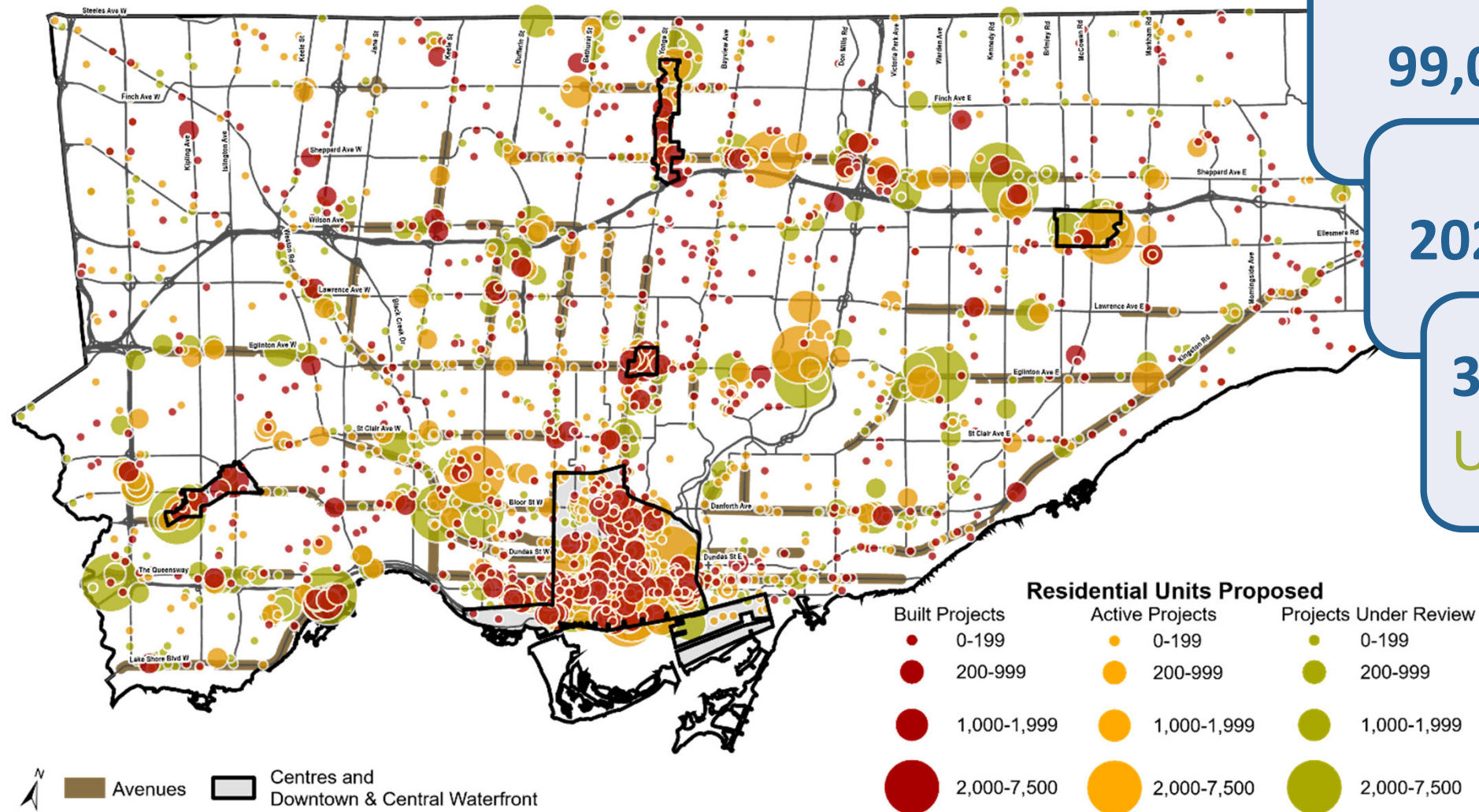
99,025 Built

202,645 Active

392,713 Units Under Review

694,383 Units Net Total

Residential Units Proposed

Built Projects	Active Projects	Projects Under Review
0-199	0-199	0-199
200-999	200-999	200-999
1,000-1,999	1,000-1,999	1,000-1,999
2,000-7,500	2,000-7,500	2,000-7,500

N

Avenues

Centres and Downtown & Central Waterfront

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Major Redevelopment Opportunities

328,051
Units

Legend

- ▇ Opportunity Sites
- ▇ Avenues per the Official Plan
- ▇ Green Space
- ⌐ ⌐ Yonge Eglinton Secondary Plan
- ▭ Downtown/Centres
- ― Major Roads/Expressways

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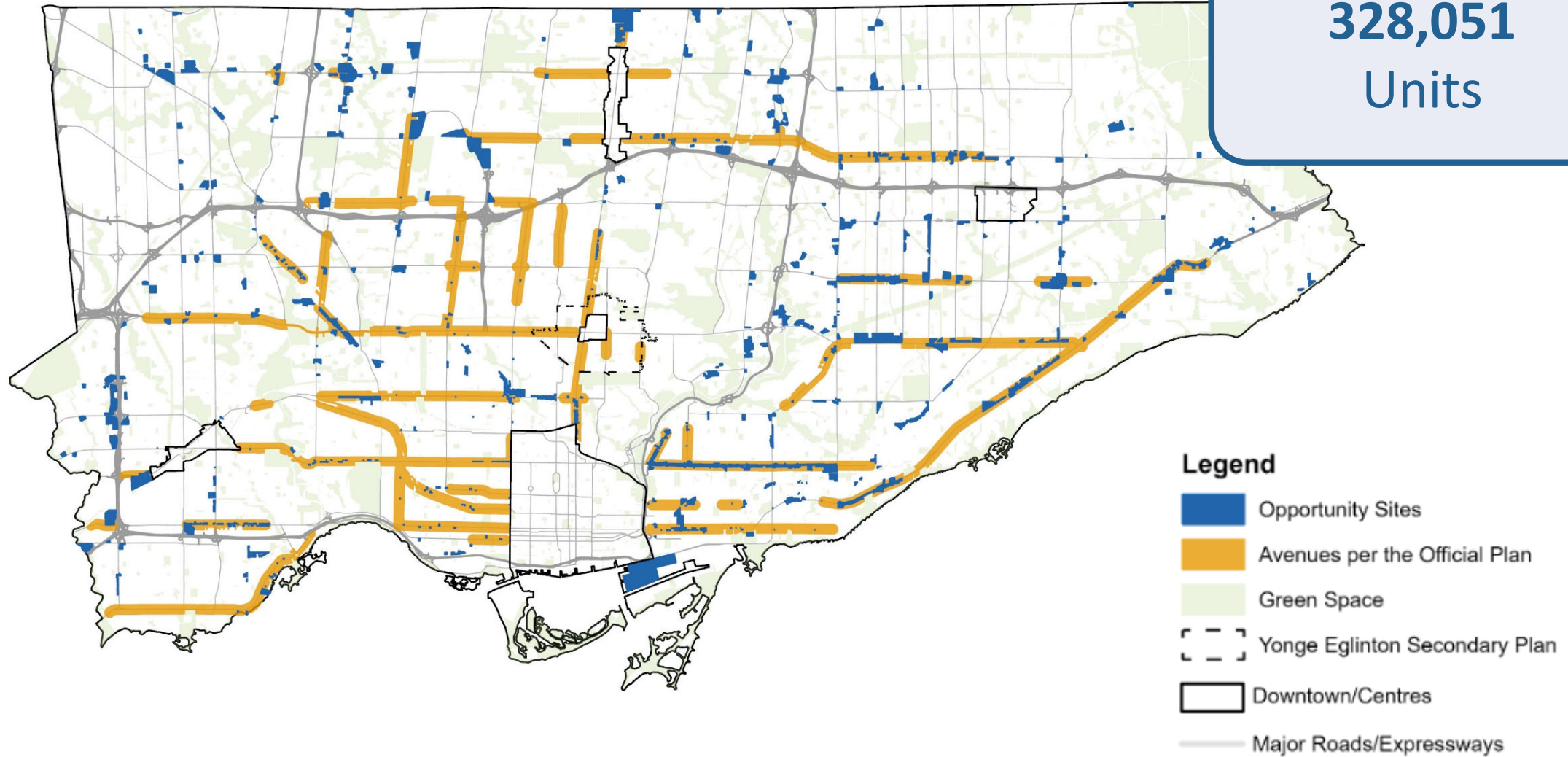
Downtown, Midtown and Centres

70,791
Midtown
& Centres

110,699
Downtown

Centres Residential and Non-Residential Potential Sites

Downtown Residential and Mixed Use Sites

Downtown Non-Residential Sites

Yonge-Eglinton Secondary Plan

Centres and Downtown

Green Space

Major Roads/Expressways

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Avenues

58,302 Units

29,339 Units
on selected parcels
not in Opportunities

Avenue Parcels meeting selection criteria

All Avenue Parcels

Avenues per the Official Plan
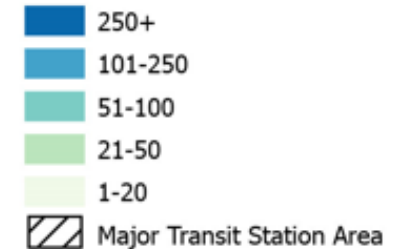
Neighbourhood Intensification & Conversion Sites

99,041 Units Intensification

41,878 Units Conversion Sites

Residential Units
- 250+
- 101-250
- 51-100
- 21-50
- 1-20
- Major Transit Station Area

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Potential Housing

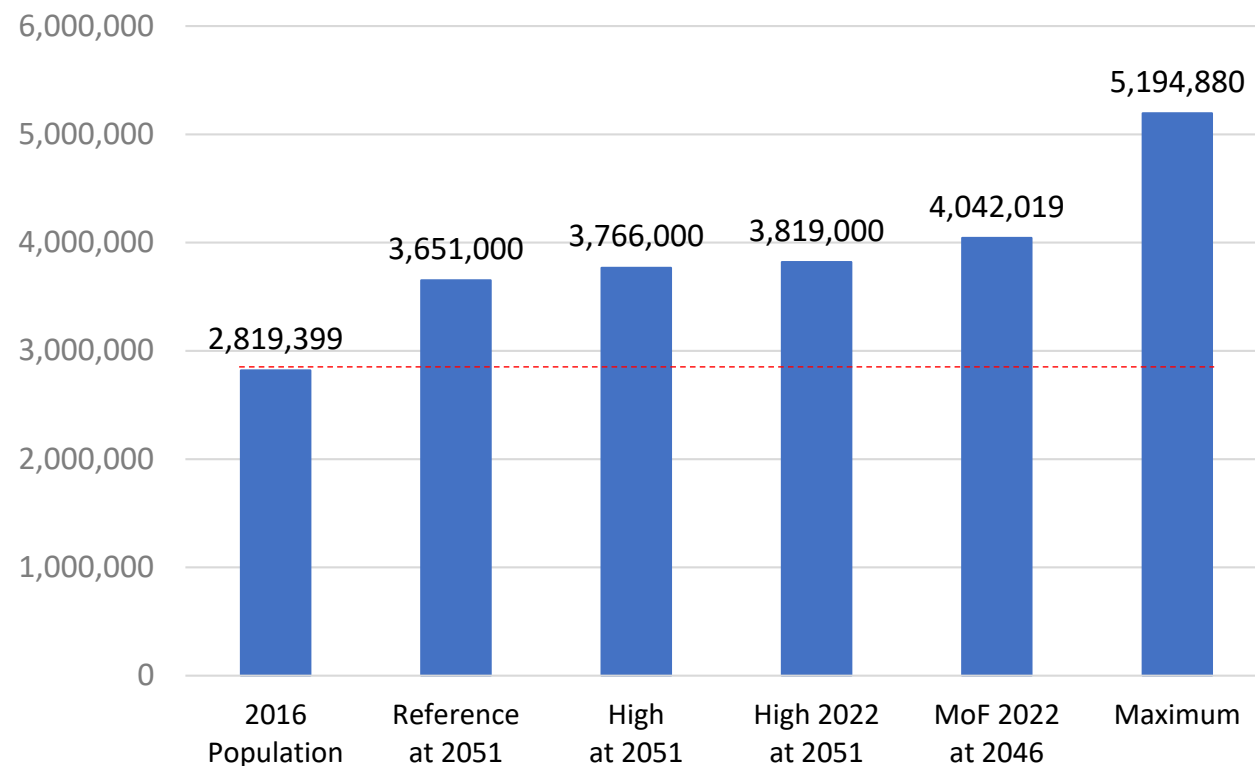**1,312,040**
Net New Units
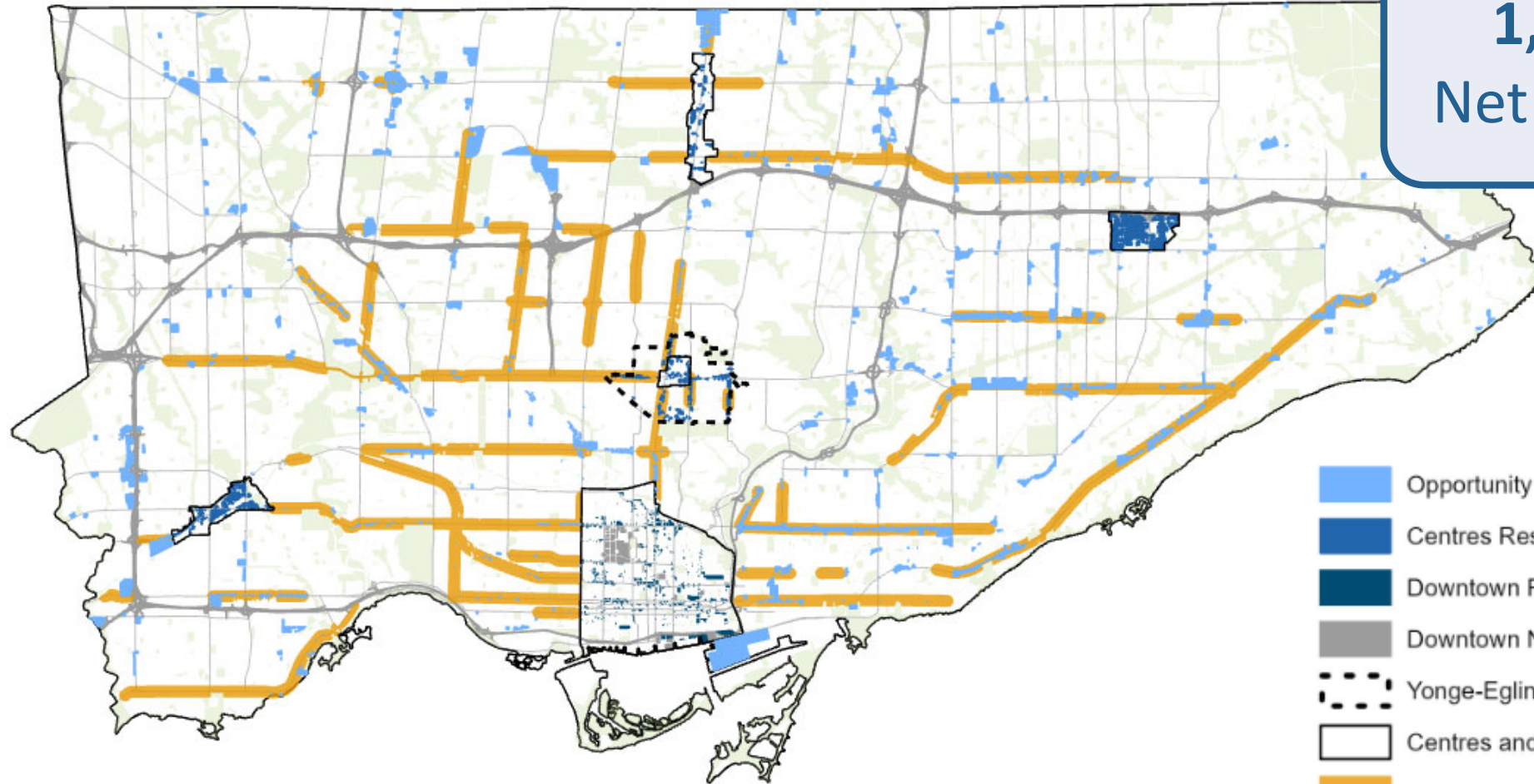
Including:

MCR 6.5-Year Development Pipeline

Neighbourhood Intensification
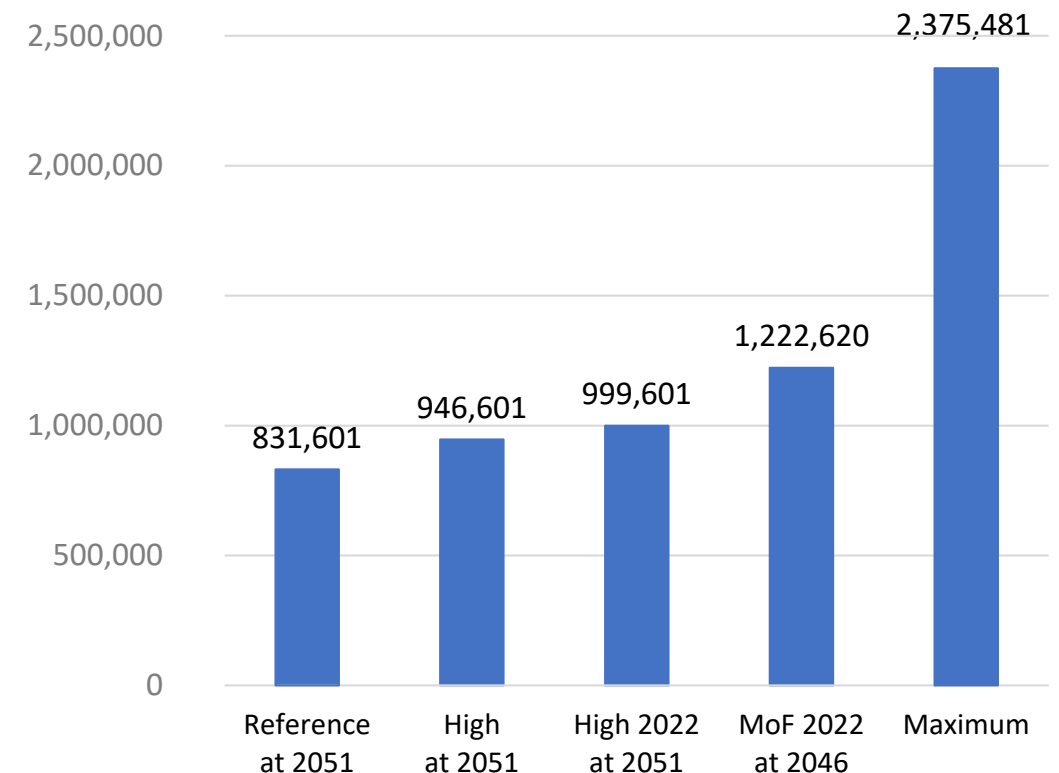
Conversion Sites

Legend:

- Opportunity Sites
- Centres Residential and Non-Residential Potential Sites
- Downtown Residential and Mixed Use Sites
- Downtown Non-Residential Sites
- Yonge-Eglinton Secondary Plan
- Centres and Downtown
- Avenues per the Official Plan
- Green Space
- Major Roads/Expressways

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Population Growth

Population Forecasts and Projections

Bar chart with y-axis from 0 to 6,000,000:
- 2016 Population: 2,819,399 (red dashed reference line)
- Reference at 2051: 3,651,000
- High at 2051: 3,766,000
- High 2022 at 2051: 3,819,000
- MoF 2022 at 2046: 4,042,019
- Maximum: 5,194,880

Population Growth versus 2016

Bar chart with y-axis from 0 to 2,500,000:
- Reference at 2051: 831,601
- High at 2051: 946,601
- High 2022 at 2051: 999,601
- MoF 2022 at 2046: 1,222,620
- Maximum: 2,375,481

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Supply Surplus

Bar chart titled "Supply Surplus" comparing Supply Required and Surplus Supply across six scenarios.

Scenario	Surplus Supply	Supply Required
Reference	61%, 50.9 yrs	39%, 562,219
High	57%, 41.7 yrs	43%, 666,926
High 2022	55%, 47.1 yrs	45%, 622,306
MoF 2022 - Supply	41%, 35.2 yrs	59%, 811,396
MoF 2022 - Demand	38%, 32.8 yrs	62%, 850,281
Maximum	0%	100%, 1,373,182

Legend: ■ Supply Required □ Surplus Supply

Projected Population Growth 2016-2051: Reference

Population Change, by Census Tract

	Zero or negative growth
	1 - 999
	1,000 - 2,499
	2,500 - 4,999
	5,000 - 9,999
	10,000 - 34,800

Centres and Downtown & Central Waterfront
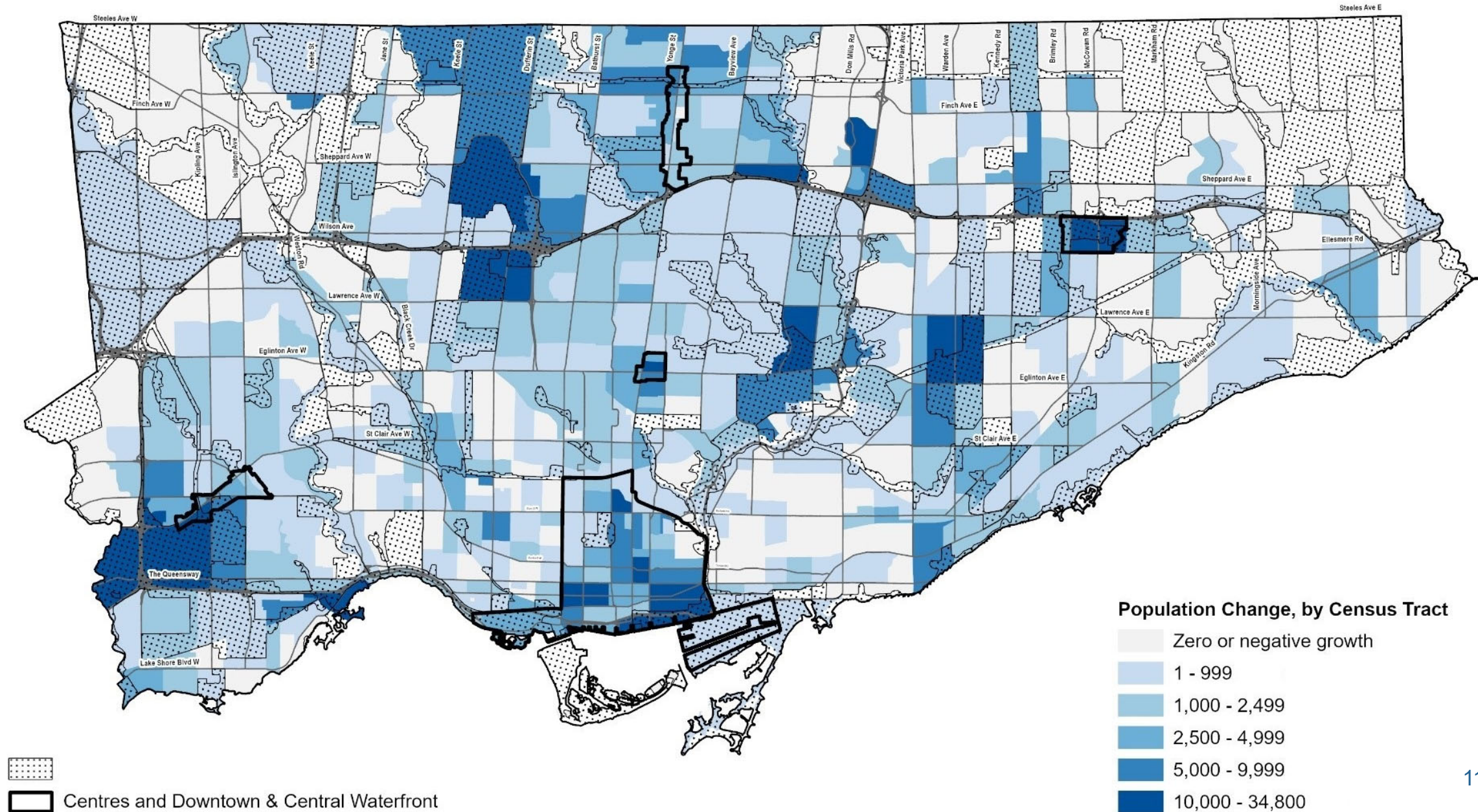
Projected Population Growth 2016-2051: Maximum

Population Change, by Census Tract

- Zero or negative growth
- 1 - 999
- 1,000 - 2,499
- 2,500 - 4,999
- 5,000 - 9,999
- 10,000 - 151,750

Predominantly Non-Residential Areas

Centres and Downtown & Central Waterfront

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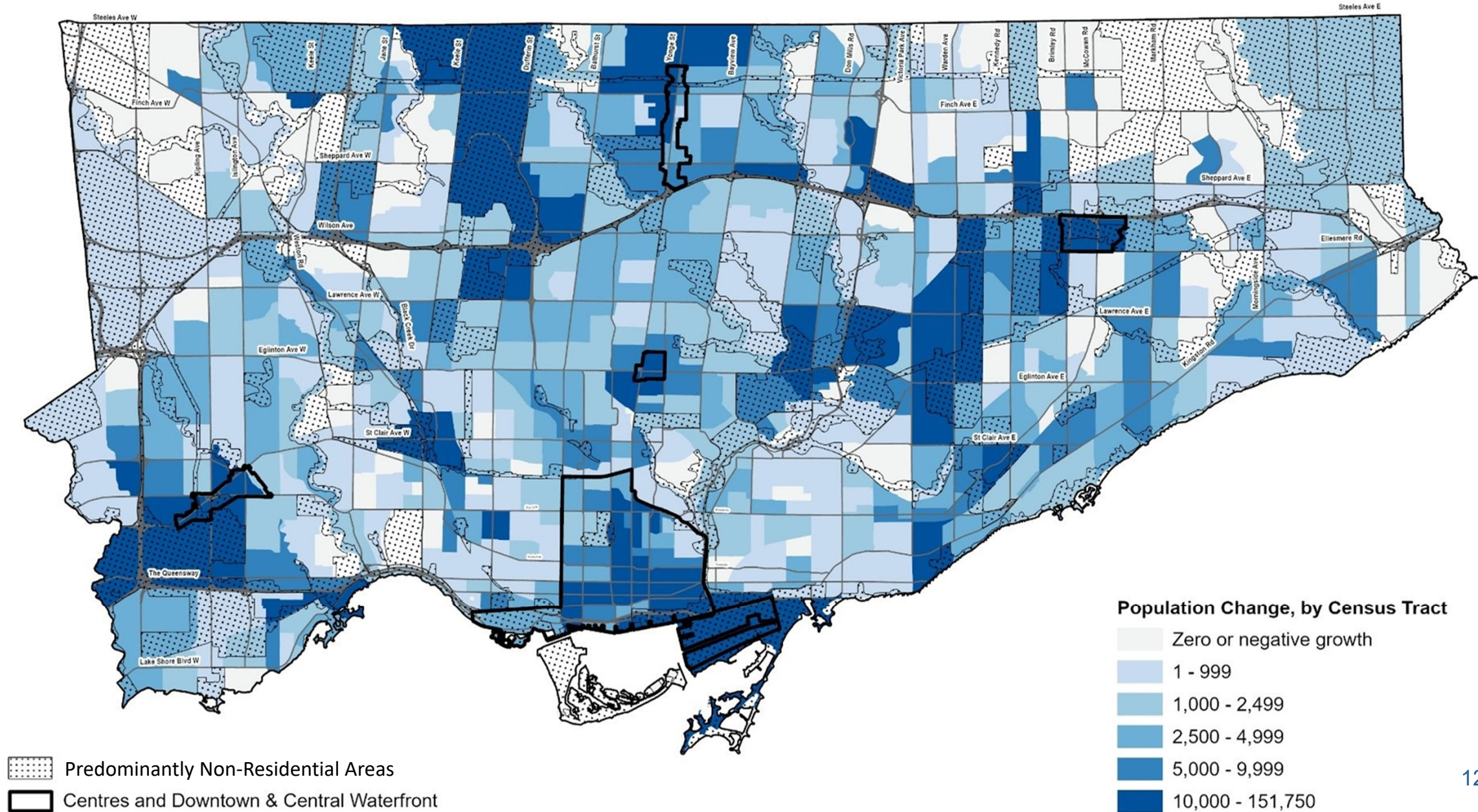
Employment Growth

Employment Forecasts and Projections

Category	Value
2016 Employment	1,607,800
Reference at 2051	1,978,800
Low at 2051	1,938,800
Medium at 2051	2,006,100
High at 2051	2,101,200
Maximum	2,658,434
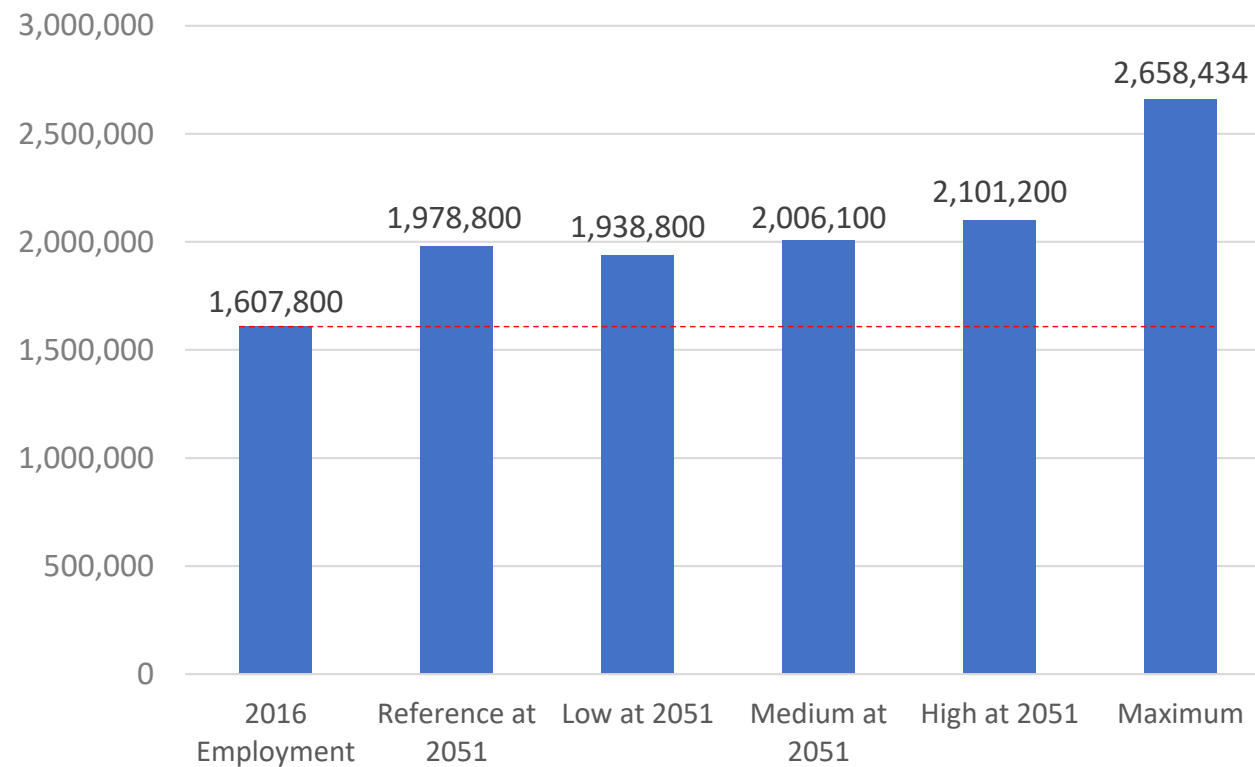
Employment Growth versus 2016

Category	Value
Reference at 2051	371,000
Low at 2051	331,000
Medium at 2051	398,300
High at 2051	493,400
Maximum	1,050,634
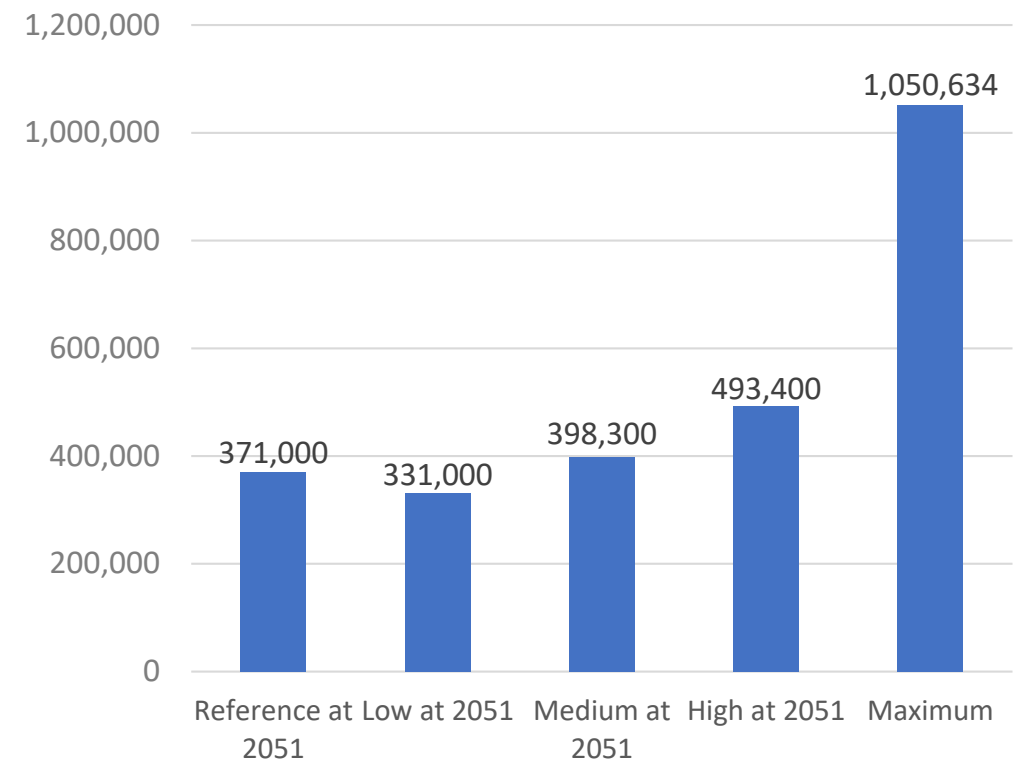
Projected Employment Growth 2016-2051: Medium

Employment Change, by Traffic Zone

- Zero or negative growth (211)
- 1 - 99 (177)
- 100 - 299 (92)
- 300 - 999 (81)
- 1,000 - 4,999 (75)
- 5,000 - 26,500 (23)

☐ Centres and Downtown & Central Waterfront
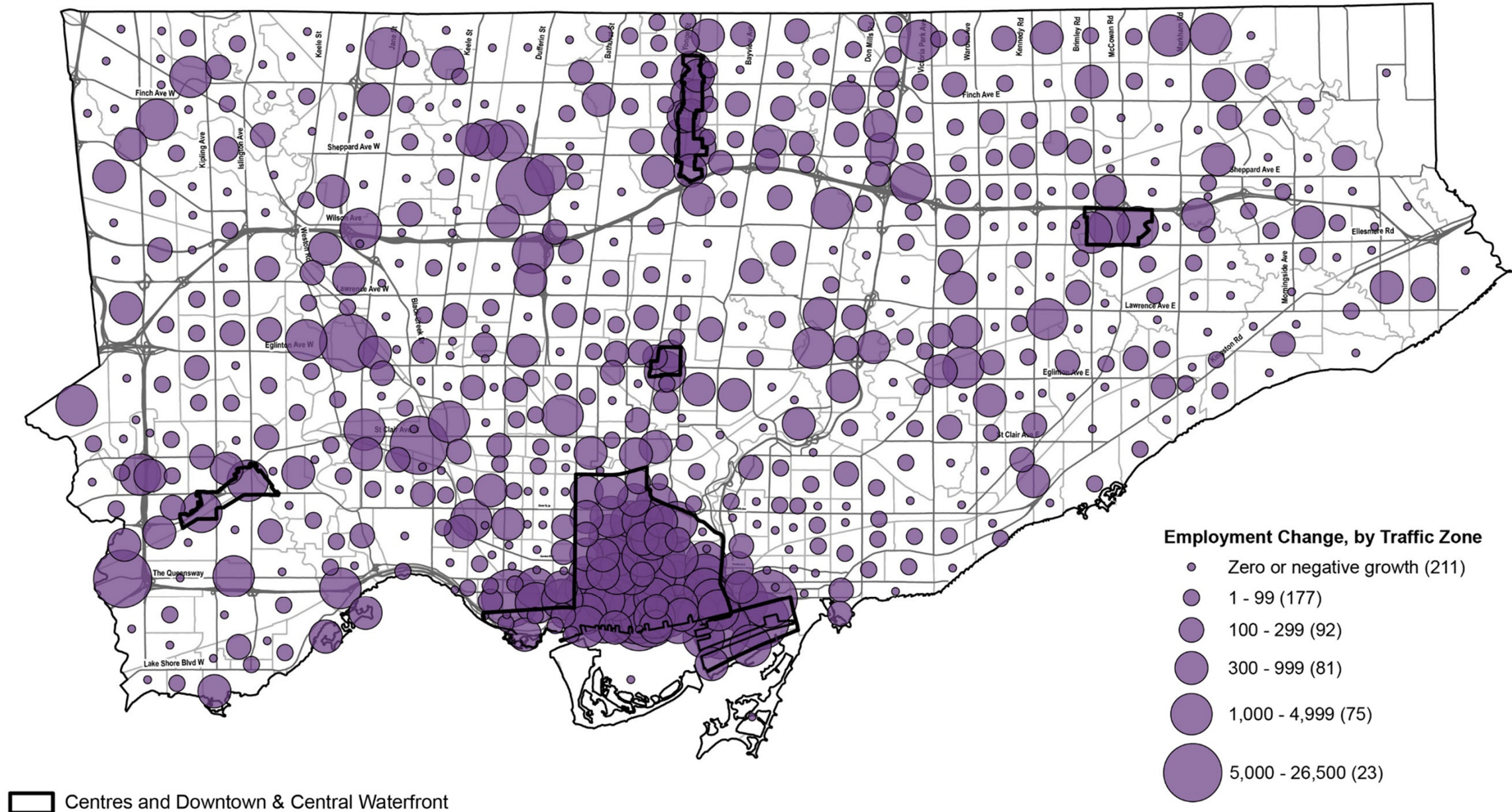
Land Needs Assessment Results

Community Area Land Needs (Housing)

- 2016 Census Housing is 1,112,930 occupied private dwellings.

- Hemson 2020 Reference Household Forecast is 430,900 households over 35 years to 2051.

- Translates into 562,000 units of the potential supply.

- City's Net Potential Supply is 1,312,040 units which is more than double the projected demand.

- Ministry of Finance projections translate into 850,281 households.

- City's Net Potential Supply has a surplus of 33 to 51 years depending on composition of the supply.

Employment Area Land Needs (Jobs)

- Toronto's total employment is projected to grow from 1,607,800 in 2016 to between 1,938,800 and 2,101,200 jobs in 2051.

- By 2051, Employment Area jobs are projected to increase from 410,700 to between 456,600 and 498,600.

- As Toronto is unable to expand its settlement area to accommodate projected Employment Area growth, existing designated lands will need to be retained and intensified.

- Conversion should only occur strategically and include secured employment.

Municipal Housing Target

Analysis

- The LNA has identified net potential housing by 2031 that is 227% of the Target.

- Achieving the Municipal Housing Target would require more units to be built than would be required to accommodate the growth currently forecasted or projected by the Province by 2031.

- If the current rate of Council approvals continued and the units were realized, the Target could be met and exceeded, but this would depend on:
  - ✓ continual improvements to approval processes
  - ✓ active participation from the development industry and housing providers
  - ✓ the City having the financial resources and tools to fund housing-related infrastructure.

Next Steps

- The Municipal Housing Target is being addressed through the Staff Report on the Municipal Housing Pledge for the City of Toronto.

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