

This bulletin illustrates how the City has developed and how it will continue to grow over time. It summarizes information from the City of Toronto's Land Use Information System II, providing an overview of all projects with any development activity between January 1, 2013 and December 31, 2017. This development pipeline date is supplemented by other data sources such as CMHC, Statistics Canada and the Toronto Employment Survey.



Revised July 2018

## Highlights

Toronto is growing with strong development prospects to bring more people and jobs into the city.

- From 2013 to 2017, 376,480 residential units were proposed and for the first time, over 10 million m<sup>2</sup> of non-residential GFA was proposed in the city of Toronto
- There are 12,621 more units and 764,711 m<sup>2</sup> more non-residential GFA in this pipeline compared to that reported on in the last *How Does the City Grow?* bulletin. New projects submitted in 2017 are proposing more development than the average over the previous five years and revisions to older projects have increased in size.
- 87% of new residential development is proposed in areas targeted for growth by the City's Official Plan.
- 290,039 residential units and 7.73 million m<sup>2</sup> of non-residential GFA proposed have not yet been built.
- The most growth was proposed in the *Downtown & Central Waterfront*, with 37% of the units and 40% of the non-residential GFA proposed in the city.
- Among the *Centres*, *Yonge-Eglinton Centre* has the most residential activity with 41% of the units proposed in the *Centres*. *North York Centre* led non-residential development with 40% of all non-residential activity in the *Centres*.
- 31% of the proposed non-residential GFA is in the *Employment Areas*.
- 64% of the proposed residential units are located in an area covered by a *Secondary Plan*.
- 727,707 m<sup>2</sup> of industrial GFA is proposed in the *Employment Areas*, accounting for 84% of proposed industrial GFA in the city.
- As the city's *Urban Growth Centres* develop, they are progressing towards meeting the Province's density targets. Most of that density is due to residential growth.

# How Does the City Grow?

## Introduction

Toronto is Canada's most populous city, the focal point of development and growth and the heart of the Greater Toronto Area (GTA). For many years now, Toronto has experienced a surge of both residential and non-residential development. This annual bulletin examines how and where the city has been growing over the past five years and how it will continue to develop in the near future.

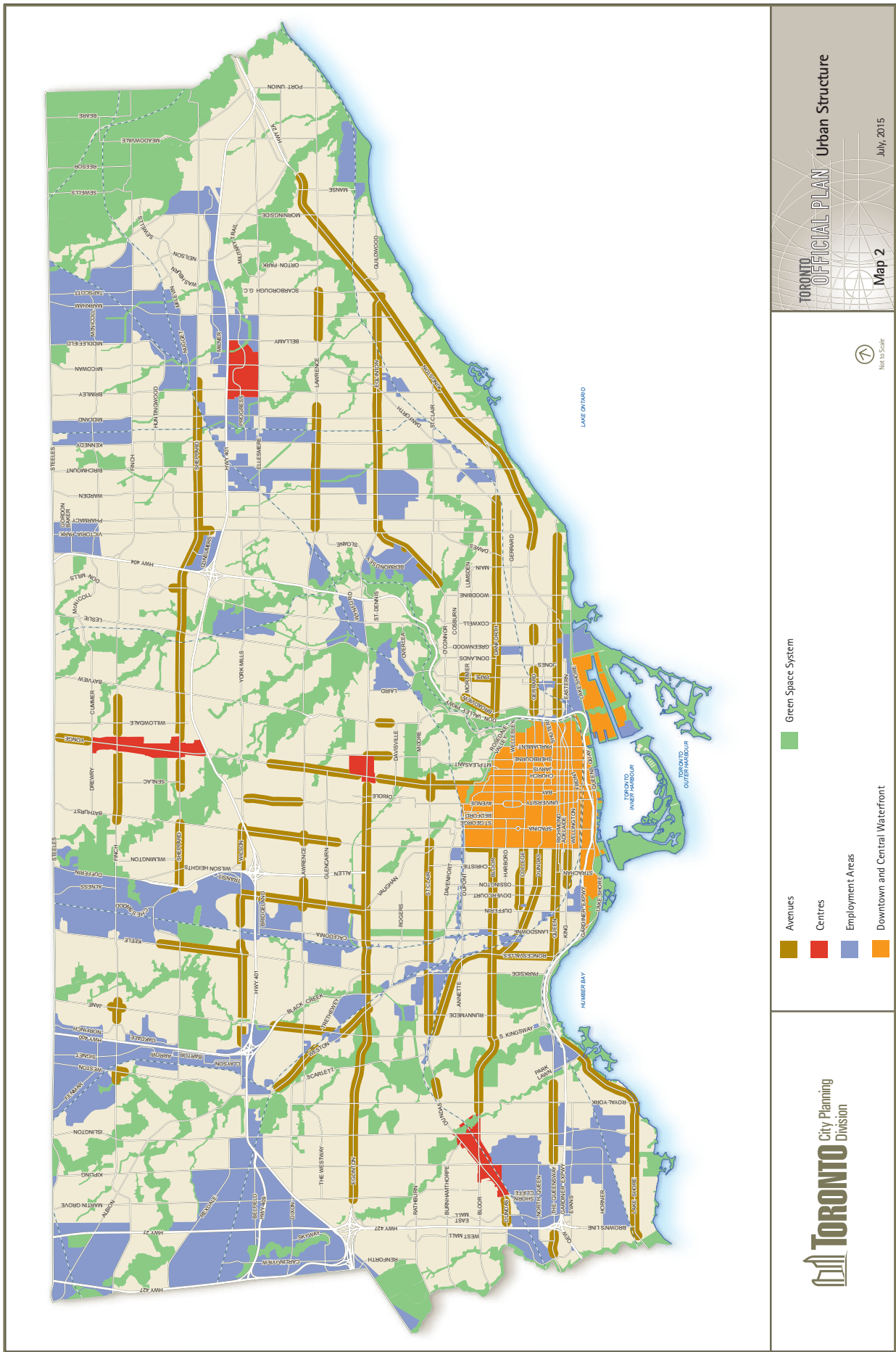
Toronto's Official Plan came into force in June 2006 and is the guide for development in the city over the next few decades. While gradual intensification occurs across the city, its central geographic theme is to direct growth to appropriate areas and away from the city's stable residential neighbourhoods and green spaces. The locations recognized as being most appropriate for residential and employment growth are those identified in the Official Plan's Urban Structure Map as *Avenues*, *Centres* and *Downtown*<sup>1</sup> as well as other areas in the city designated as *Mixed Use Areas* and *Employment Areas*<sup>2</sup>. The Official Plan's Urban Structure Map is included in this bulletin as Map 1 on page 2.

## Toronto's Proposed Development Pipeline

### What is the Development Pipeline?

The City of Toronto's Development Pipeline consists of all development projects in the City of Toronto that have been active over the last five years. This provides a lens through which to monitor Toronto's near-term housing supply. The current Development Pipeline consists of all of the projects for which there has been development activity over the last five years, between January 1, 2013 and December 31, 2017. Development activity refers to progress at any stage of the approvals and development processes, including: applications submission, review, approval, Building Permit application, Building Permit issuance, construction, occupancy, and completion. The development Pipeline provides an extensive representation of development activity within the city. Previous versions of the Pipeline before 2016 are not directly comparable.

Projects are categorized into three general statuses, based on the stage of development they reached between January 1, 2013 and December 31, 2017. 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. This includes projects with approved Official Plan Amendments



and/or Zoning By-law Amendments but for which not all Site Plans have been submitted or are approved. This status includes projects with some Planning approvals and for which Building Permits have been applied for or have been issued. This status also includes projects which are under construction but are not yet built. Projects under review are those which have not yet been approved or refused and those which are under appeal.

### The Development Pipeline Prior to 2016

Prior to 2016, previous issues of this bulletin reported on all applications *received* within a five year period rather than all applications *active* within a five-year period. While the previous iteration of the Pipeline provided an overview of the near-term housing supply and a consistent window through which to view the ebb and flow of the number of proposals submitted over time, as the nature of development in the city has evolved over time, the five-year window of applications received no longer provided a complete picture of development activity in the city.

Over the last several years, there have been fewer projects submitted for approval. However, on average,

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

	Built	Active	Under Review	Total in Pipeline	% of Total
<b>City of Toronto</b>	<b>965</b>	<b>780</b>	<b>662</b>	<b>2,407</b>	
<b>Growth Areas</b>					
<b>Downtown and Central Waterfront</b>	<b>165</b>	<b>161</b>	<b>135</b>	<b>461</b>	<b>19.2</b>
<b>Centres</b>	<b>28</b>	<b>31</b>	<b>36</b>	<b>95</b>	<b>3.9</b>
Etobicoke Centre	7	7	7	21	22.1
North York Centre	11	9	10	30	31.6
Scarborough Centre	3	3	3	9	9.5
Yonge-Eglinton Centre	7	12	16	35	36.8
<b>Avenues</b>	<b>186</b>	<b>169</b>	<b>186</b>	<b>541</b>	<b>22.5</b>
<b>Other Mixed Use Areas</b>	<b>79</b>	<b>80</b>	<b>57</b>	<b>216</b>	<b>9.0</b>
<b>All Other Areas</b>	<b>507</b>	<b>339</b>	<b>248</b>	<b>1,094</b>	<b>45.5</b>

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

Development projects with activity between January 1, 2013 and December 31, 2017. 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.

these projects are larger or more complex and which take longer to progress through the application review process and to complete construction given their size and complexity. Consequently, in 2016, the development Pipeline was enhanced to provide a more fulsome representation of near-term housing supply in the City.

### The Development Pipeline January 1, 2013 – December 31, 2017

Toronto continues to experience strong growth and development activity and continues to have new projects proposed year over year (see Maps 2 and 3). The 2017 Development Pipeline is comprised of 2,407 development projects (see Table 1 on page 3). Cumulatively, these projects propose a record 376,480 residential units, and for the first time, over 10 million square metres of non-residential Gross Floor Area (GFA) (see Tables 2 and 3 on pages 3 and 4).

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

	Built	Active	Under Review	Total in Pipeline	% of Total
<b>City of Toronto</b>	<b>86,441</b>	<b>143,858</b>	<b>146,181</b>	<b>376,480</b>	
<b>Growth Areas</b>					
<b>Downtown and Central Waterfront</b>	<b>38,256</b>	<b>56,855</b>	<b>45,005</b>	<b>140,116</b>	<b>37.2</b>
<b>Centres</b>	<b>7,148</b>	<b>14,305</b>	<b>14,170</b>	<b>35,623</b>	<b>9.5</b>
Etobicoke Centre	709	2,042	1,319	4,070	11.4
North York Centre	3,772	1,080	2,795	7,647	21.5
Scarborough Centre	403	4,838	4,098	9,339	26.2
Yonge-Eglinton Centre	2,264	6,345	5,958	14,567	40.9
<b>Avenues</b>	<b>17,101</b>	<b>28,491</b>	<b>35,909</b>	<b>81,501</b>	<b>21.6</b>
<b>Other Mixed Use Areas</b>	<b>10,610</b>	<b>22,465</b>	<b>22,798</b>	<b>55,873</b>	<b>14.8</b>
<b>All Other Areas</b>	<b>13,326</b>	<b>21,742</b>	<b>28,299</b>	<b>63,367</b>	<b>16.8</b>

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

Proposed units in development projects with activity between January 1, 2013 and December 31, 2017. 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.

**Project Stages and Statuses**

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

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

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

	Built	Active	Under Review	Total in Pipeline	% of Total
<b>City of Toronto</b>	<b>2,569,080</b>	<b>3,608,804</b>	<b>4,118,633</b>	<b>10,296,517</b>	
<b>Growth Areas</b>					
<b>Downtown and Central Waterfront</b>	<b>1,138,537</b>	<b>1,720,351</b>	<b>1,223,019</b>	<b>4,081,907</b>	<b>39.6</b>
<b>Centres</b>	<b>85,243</b>	<b>104,469</b>	<b>84,997</b>	<b>274,709</b>	<b>2.7</b>
Etobicoke Centre	3,169	4,777	13,438	21,384	7.8
North York Centre	45,128	31,090	34,501	110,719	40.3
Scarborough Centre	2,221	44,945	5,840	53,006	19.3
Yonge-Eglinton Centre	34,725	23,657	31,218	89,600	32.6
<b>Avenues</b>	<b>127,372</b>	<b>243,198</b>	<b>328,100</b>	<b>698,670</b>	<b>6.8</b>
<b>Other Mixed Use Areas</b>	<b>329,605</b>	<b>319,205</b>	<b>327,464</b>	<b>976,274</b>	<b>9.5</b>
<b>All Other Areas</b>	<b>888,324</b>	<b>1,221,581</b>	<b>2,155,053</b>	<b>4,264,958</b>	<b>41.4</b>

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

Proposed non-residential GFA in development projects with activity between January 1, 2013 and December 31, 2017. 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 2017 Pipeline contains 12,621 more residential units and 764,711 m<sup>2</sup> more non-residential GFA than the 2016 Pipeline which reported on projects active between January 1, 2012 and December 31, 2016, and yet contains 116 fewer projects. This is due to the continuing trend

of applications for larger projects proposing more development than average over previous years as well as revisions to older projects that have increased their size (see Figure 1).<sup>3</sup>

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

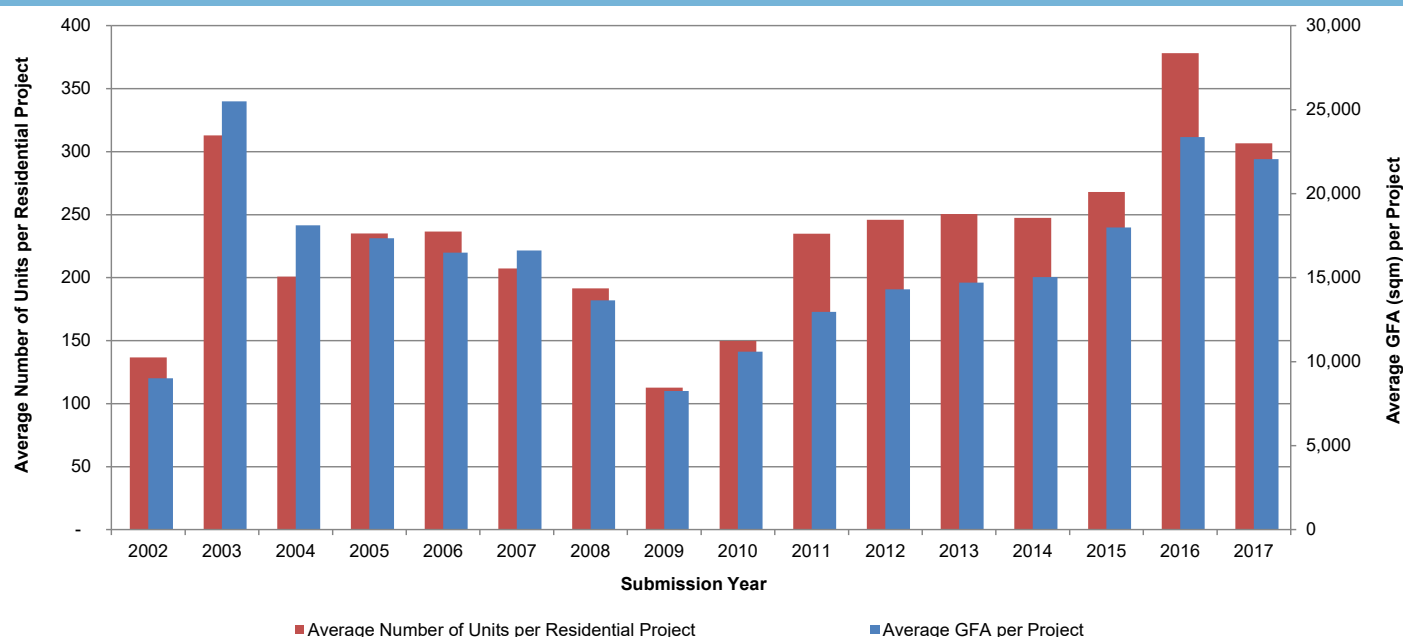
Over the last five years, more residential units have been approved than were built (see Table 4 on page 5). City Council has approved an average of 20,851 residential units per year between 2013 and 2017 while 18,598 units on average were built each year. This will help to ensure that a steady supply of approved housing will be available for construction and eventual occupancy.

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

### Projects Completed or Under Construction

The Pipeline includes development projects that may expect to see

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



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

Development projects submitted between January 1, 2002 and December 31, 2017 and with activity between January 1, 2013 and December 31, 2017.

Proposed GFA includes residential and non-residential GFA.

**Table 4: Residential Units Approved and Built by Year**

Year	Units Approved	Units Built
2013	27,588	19,263
2014	31,261	25,731
2015	17,028	18,857
2016	11,744	20,416
2017	16,633	8,725
<b>Total</b>	<b>104,254</b>	<b>92,992</b>
Average	20,851	18,598

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

Units in development projects with activity between January 1, 2013 and December 31, 2017. Units approved are units in projects that received their first planning approval in the year listed. Units built are units in projects that became ready for occupancy and/or were completed in the year listed. Note: the number of units built in Table 2 may differ from the number of units in built projects listed in Table 4, as some projects became ready for occupancy before 2013 but had other development activity (such as an application for a Draft Plan of Condominium) during the pipeline window of January 1, 2013 to December 31, 2017. 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.

construction in the near-term. Many projects with development activity between 2013 and 2017 have become occupied and/or have completed construction during this period. In the current Pipeline, 40% of the projects in the pipeline or 965 proposed projects have completed construction or received a partial occupancy permit. These projects represent an addition of 86,441 newly constructed residential units to the City's housing supply and nearly 2.6 million m<sup>2</sup> of non-residential gross floor area.

While many projects have been completed, the City of Toronto has continued to receive and review additional development applications.

### Active Projects

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 shows all proposed residential units in active projects broken down by the stage of activity. These residential projects that are approved but not yet built and represent 8 to 12 years of proposed housing supply, given the average pace of completions reported by the CMHC over the past 10 to 30 years respectively (see Table 6). In the current Pipeline, 34% of projects are active with at least one Planning approval, accounting for 143,858 residential units and 3.6 million m<sup>2</sup> of non-residential GFA.

### Projects Under Review

In the current Pipeline, there are 146,181 residential units and an additional 4.1 million m<sup>2</sup> of non-residential GFA in projects currently

under review. Figure 2 (on Page 6) displays these units by status, showing that 39% of the proposed residential units are currently under review.

Across the city, more than three-quarters of the residential units and non-residential GFA proposed in the development Pipeline are not yet built. There are 290,039 units and 7.7 million m<sup>2</sup> of non-residential GFA that are either under review or awaiting construction, indicating a continuation of strong construction activity in Toronto in the coming years.

## Dwelling Unit Completions and Absorptions

There is an ongoing debate about conditions in the housing market. Given the large number of residential units recently completed in the city, it is fair to ask whether this reflects growing housing demand or the early signs of an overbuilt market. 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 has decreased 2008–2012 to 4.2% from 7.4% over 2013–2017. In 2012, about 13,500 residential units were completed and 12,000 units were absorbed, making the unabsorbed percentage in 2012 (12.2%) the highest in the 15-year span. The lag in absorption disappeared in the following year as the 2013 unabsorbed percentage came back down to 4.9% and is closer to the average over the past 15 years.

Over the last two years, the number of units absorbed was greater than the number completed. This indicates that some units that completed construction in previous years were absorbed into the market in 2015 and 2016. Further, an unprecedented number of units were completed in 2015 and 96% of them were absorbed in the same year. These recent trends demonstrate a strong demand for

**Table 5: Proposed Residential Units in Active Projects by Stage**

Stage as of December 31, 2017		Proposed Residential Units in Active Projects		Active Residential Projects	
Stage	Stage Description	Number	Percent	Number	Percent
2	Delegated/Council Approval*	51,486	36%	185	40%
3	Permit Application	40,859	28%	130	28%
4	Issuance of a Permit	5,807	4%	22	5%
5	Work Started	45,706	32%	127	27%
<b>Total</b>		<b>143,858</b>	<b>100%</b>	<b>464</b>	<b>100%</b>

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

Active development projects with activity between January 1, 2013 and December 31, 2017. Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or those which are under construction.

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

**Table 6: Dwelling Completions, Greater Toronto Area**

Year	Toronto	GTA	Toronto % of GTA
1988-1992	44,962	167,526	26.8%
1993-1997	25,711	105,029	24.5%
1998-2002	41,227	184,446	22.4%
2003-2007	57,899	205,331	28.2%
2008-2012	69,335	171,518	40.4%
2013-2017	85,040	186,698	45.5%
<b>Total</b>	<b>324,174</b>	<b>1,020,548</b>	<b>31.8%</b>
Average 1988-2017	10,806	34,018	
Average 2008-2017	15,438	35,822	

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

Note: Completions are for whole calendar years.

living in Toronto and not an overbuilt market. Supply and demand are well balanced.

The Market Absorption Survey demonstrates that the bulk of the unabsorbed units are in the rental market. Rental completions represented 6% of total completions, but only 4% of total absorptions. The higher rate of unabsorbed rental units is not the result of oversupply of this type of unit. The methodology of the Market Absorption Survey requires that buildings must be 100% completed and that people are beginning to move in before the units become counted as “absorbed”. The recording of absorptions will tend to

lag completions in the latest periods of the Survey. Therefore, the data on absorptions and completions needs to be cautiously interpreted.

## Development in Toronto's Growth Areas

Toronto's Official Plan, which came into force in June 2006, is the guide for development in the city over the next few decades. Its central geographic theme is to direct growth to appropriate areas and away from the city's stable residential neighbourhoods and green spaces. The locations recognized as being most appropriate for residential and employment growth are those identified in the Official Plan's Urban Structure Map as *Avenues*, *Centres*, *Downtown*,<sup>1</sup> as well as other areas in the city designated as *Mixed Use Areas* and *Employment Areas*.<sup>2</sup> The Official Plan's Urban Structure Map is included in this bulletin as Map 1 on page 2.

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

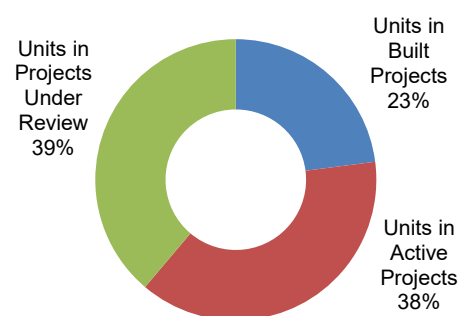
	Completions	Absorptions	Net Completions	"Unabsorbed" Percentage
2003	13,119	12,478	641	5.1%
2004	10,438	10,575	-137	-1.3%
2005	15,136	15,126	10	0.1%
2006	12,420	11,962	458	3.8%
2007	6,786	7,159	-373	-5.2%
2008	13,450	12,878	572	4.4%
2009	12,473	11,704	769	6.6%
2010	13,088	12,075	1,013	8.4%
2011	16,850	15,868	982	6.2%
2012	13,474	12,009	1,465	12.2%
2013	14,542	13,868	674	4.9%
2014	9,551	9,620	-69	-0.7%
2015	30,749	29,451	1,298	4.4%
2016	16,027	16,629	-602	-3.6%
2017	14,171	14,675	-504	-3.4%
<b>Total</b>	<b>212,274</b>	<b>191,402</b>	<b>20,872</b>	<b>10.9%</b>
<b>2003-2017 Average</b>	<b>14,152</b>	<b>13,738</b>	<b>413</b>	<b>3.0%</b>
2003-2007 Average	11,580	11,460	120	1.0%
2008-2012 Average	13,867	12,907	960	7.4%
2013-2017 Average	17,008	16,315	693	4.2%

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, 2018 year-to-date data has been excluded.

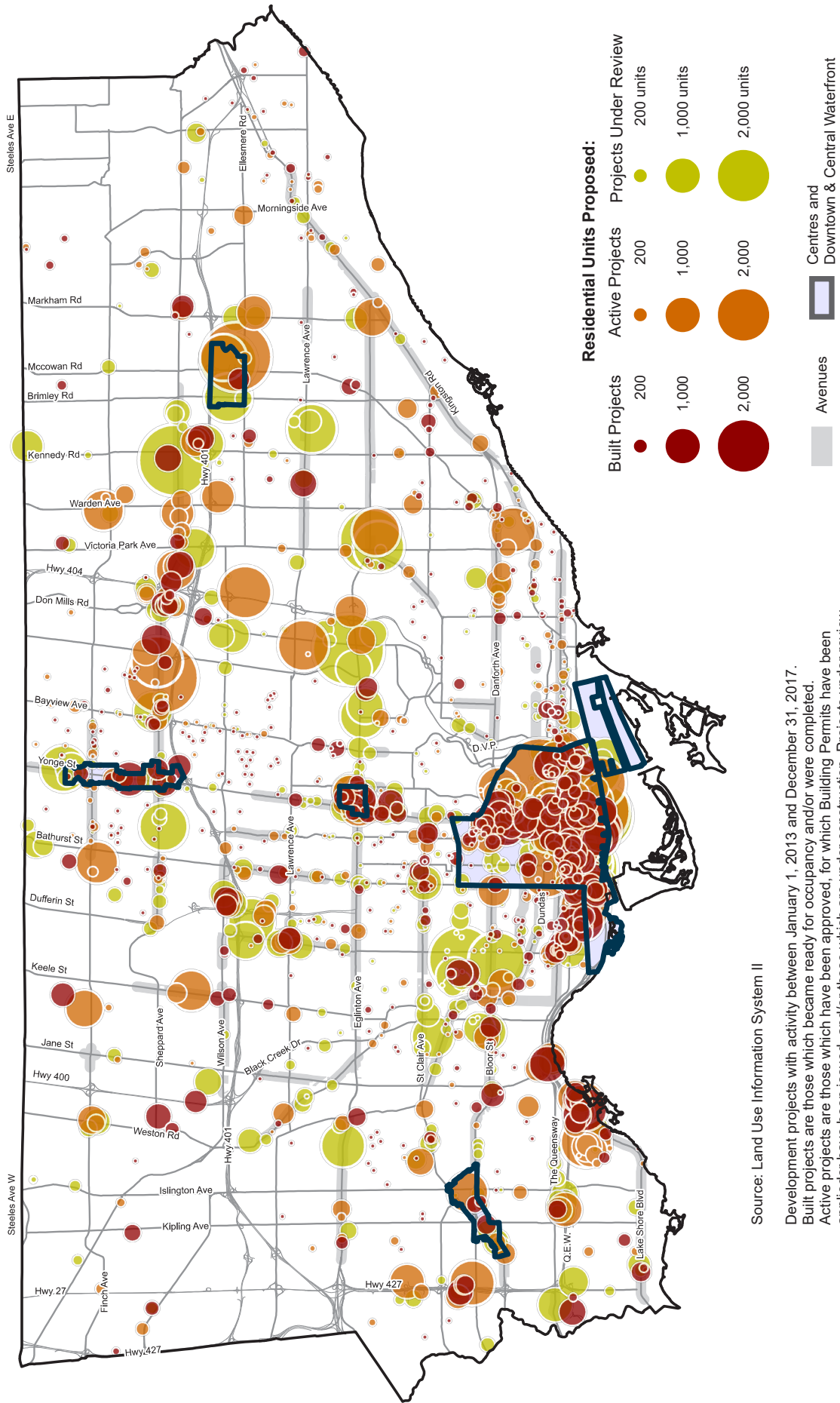
Note 2: "Unabsorbed Percentage" is the ratio of Completions minus Absorptions to Absorptions.

**Figure 2: Residential Units by Status**



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

Proposed units in development projects with activity between January 1, 2013 became ready for occupancy and/or were completed. Active projects are those which have been approved, for which Building Permits have and December 31, 2017. Built projects are those which 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.



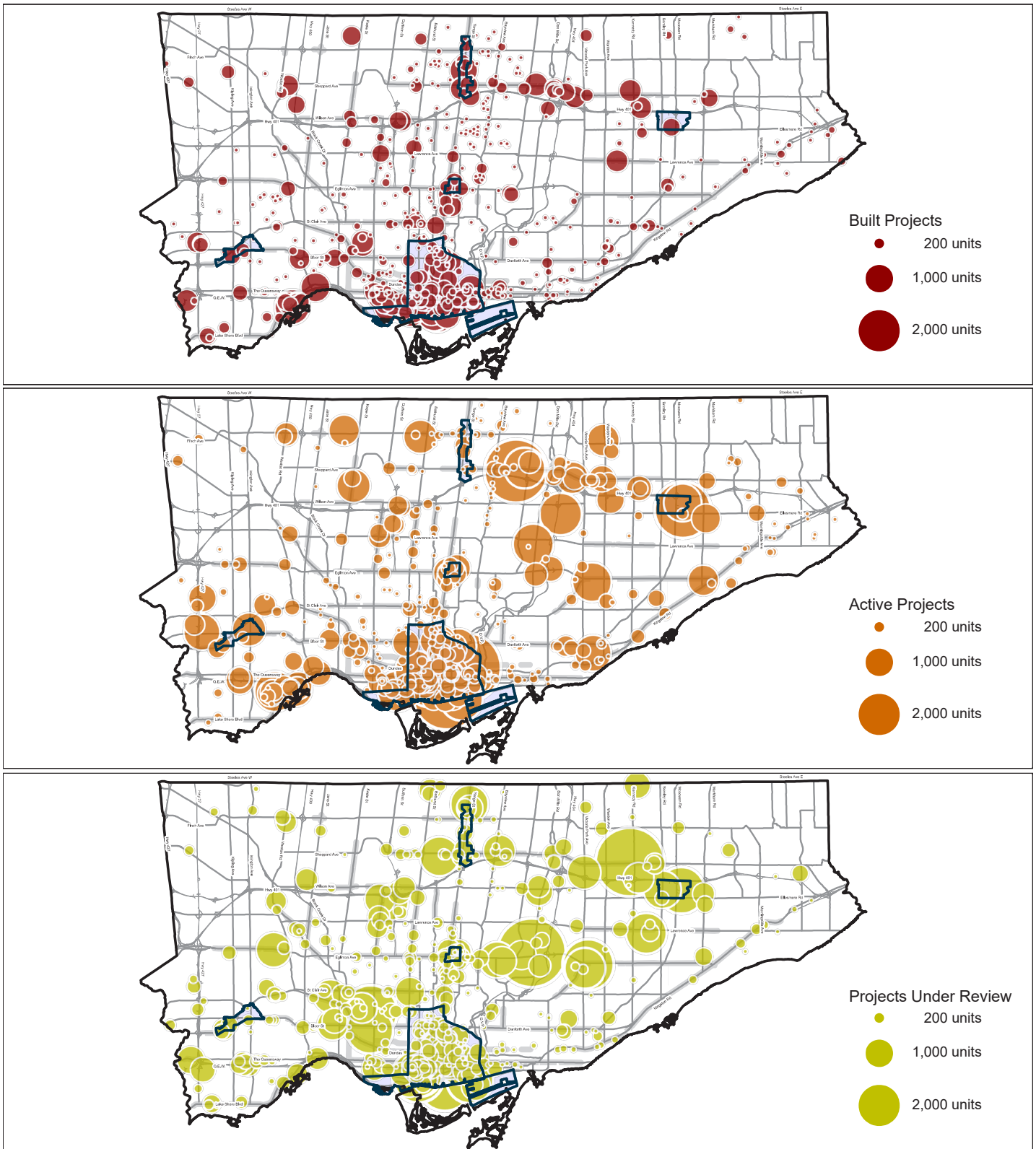
Source: Land Use Information System II

Development projects with activity between January 1, 2013 and December 31, 2017. 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 for, and/or those which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal.

Toronto City Planning Division, Research and Information - June 2018



**Map 3: City of Toronto Proposed Residential Development by Status**



Source: Land Use Information System II  
 Development projects with activity between January 1, 2013 and December 31, 2017.  
 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.

Avenues  
 Centres and Downtown & Central Waterfront

**Image 1: Regent Park Redevelopment, Block 37**



Source: Toronto Community Housing Corp. and Daniels Corp., Site Plan drawing A000, February 3, 2016.

**Image 2: Alexandra Park Redevelopment, Block 10**



Source: Toronto Community Housing Corp., Site Plan drawing A000, February 7, 2013.

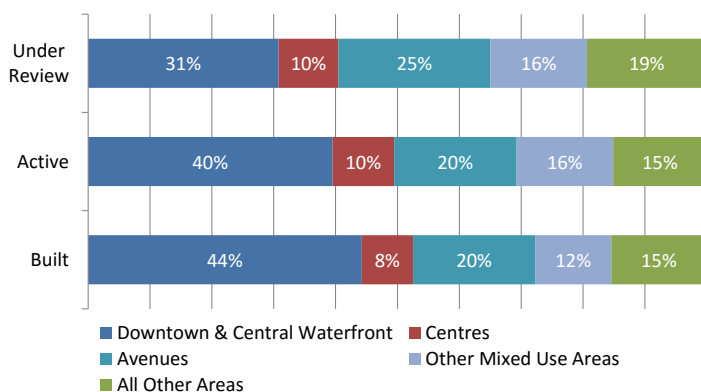
## Downtown and Central Waterfront

The *Downtown* and *Central Waterfront* area is the most prominent location for development activity across the City and contains the largest percentage of proposed development of all the City's growth management areas. In the current development Pipeline, the projects received in this area proposed 140,116 new units and 4.1 million m<sup>2</sup> of non-residential GFA. This comprises 37% of the residential units and 40% non-residential GFA proposed in the entire city (see Figures 3 and 4).

Maps 4 and 5 (on pages 10 and 11) show the distribution of residential and non-residential projects throughout *Downtown*, respectively. Map 4 shows that the area between Queen Street and the Waterfront has attracted increasingly large residential development proposals. The largest residential projects in this area are currently active. The proposed residential units in *Downtown* projects proposing 1,000 units or more are listed in Table 8.

Two of the largest projects in *Downtown* are large affordable housing redevelopment projects on both sides of Dundas Street (see Images 1 and 2 on page 9). Public-private partnerships in Regent Park and Alexandra Park are developing new market housing to leverage improvements to existing social housing stock and to create new retail developments, community spaces and infrastructure. The results will be more mixed-income, mixed-use neighbourhoods that better integrate with the surrounding communities.

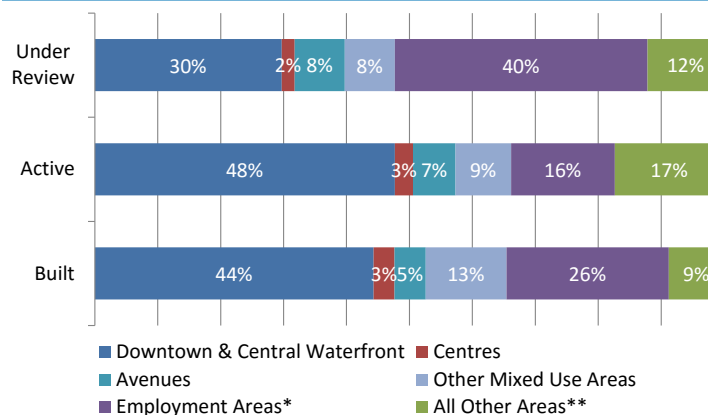
**Figure 3: Proposed Residential Units in Growth Areas by Status**



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

Proposed units in development projects with activity between January 1, 2013 and December 31, 2017. 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 4: Proposed Non-Residential Gross Floor Area in Growth Areas by Status**



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










Proposed non-residential GFA in development projects with activity between January 1, 2013 and December 31, 2017. 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. Percentages may not total 100 due to rounding.

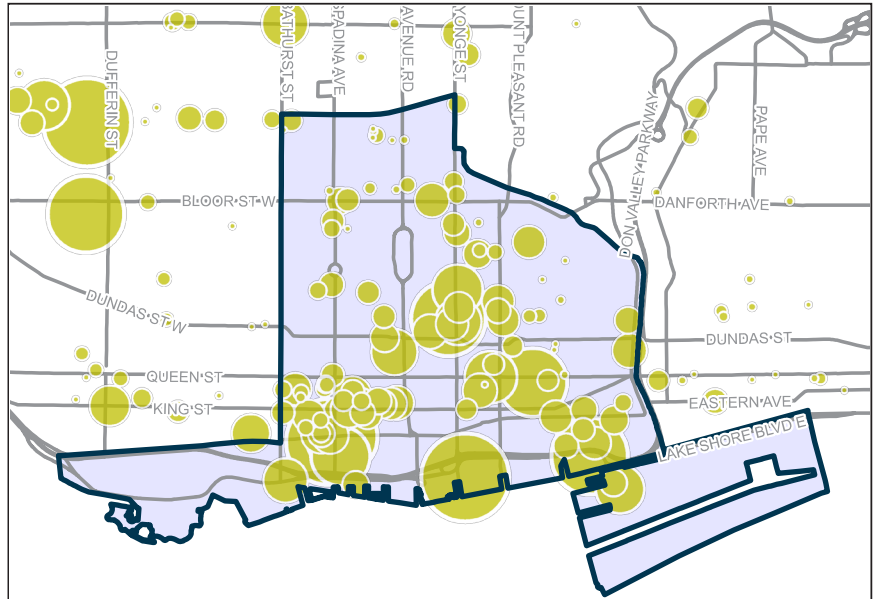
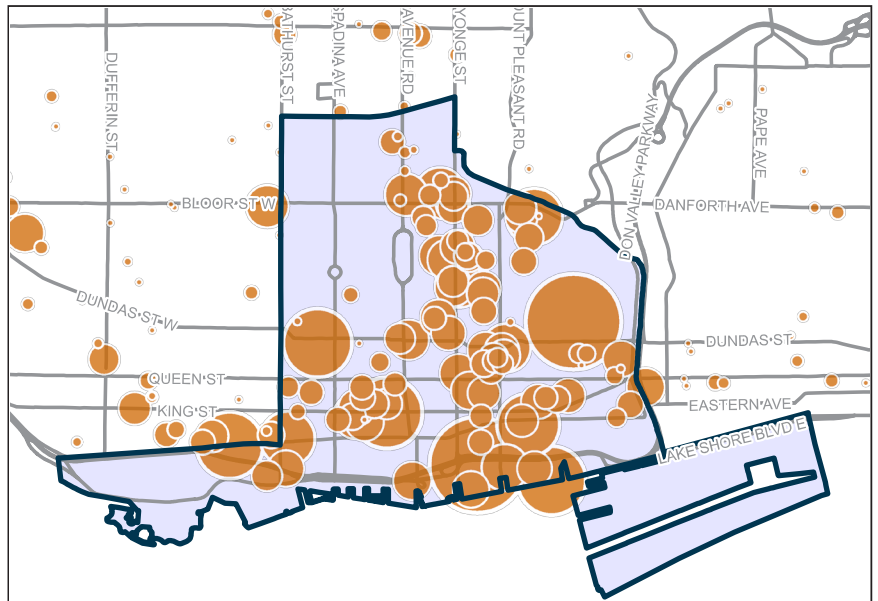
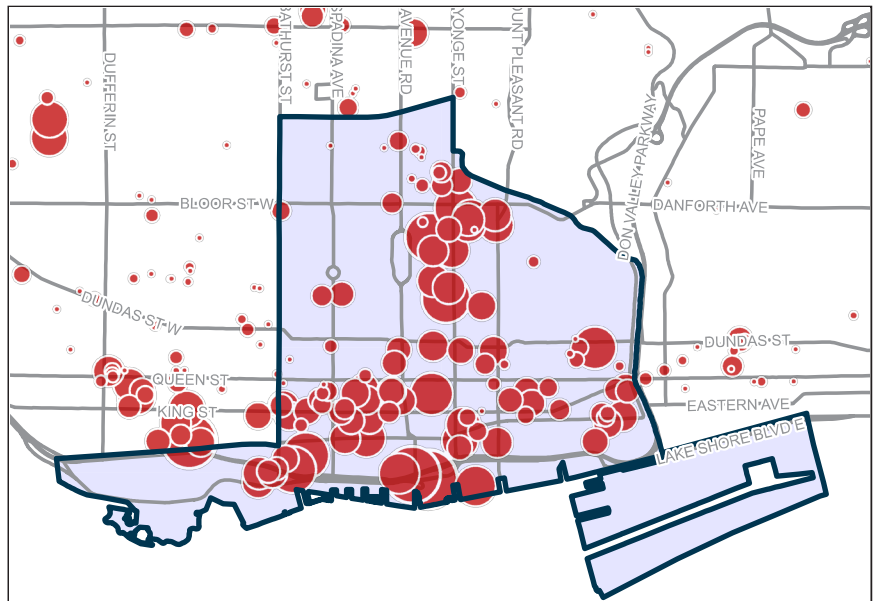
\*Employment Areas outside of Downtown, Centres, Avenues, and Other Mixed Use Areas only.

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

**Map 4: Downtown and Central Waterfront Residential Development Activity**

**Residential Units Proposed**

Built	Active	Under Review
		
		
		
38,256 units	56,855 units	45,005 units



Source: Land Use Information System II

Development projects with activity between January 1, 2013 and December 31, 2017.

Built projects are those which became ready for occupancy and/or were completed.

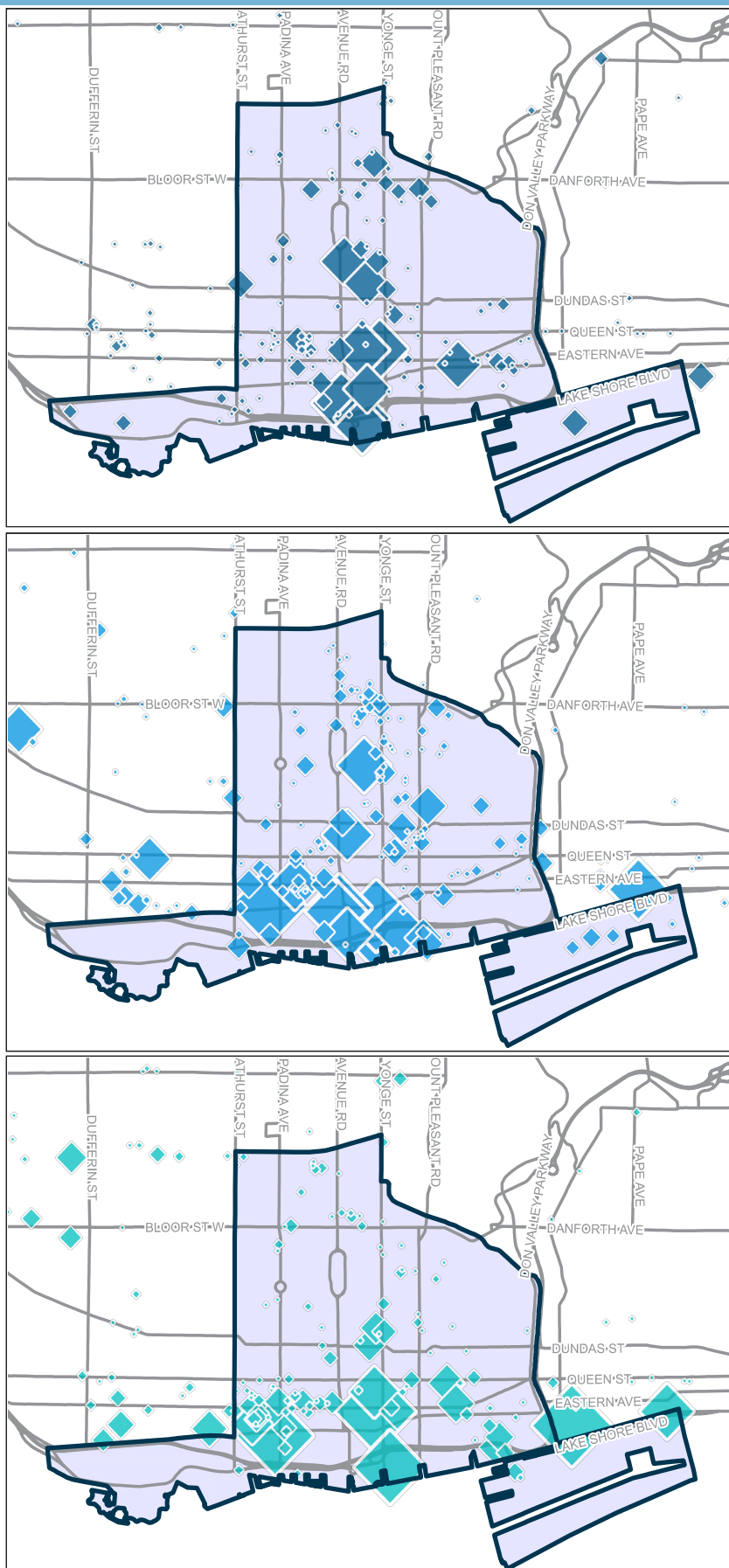
Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or those which are under construction.

Projects under review are those which have not yet been approved or refused and those which are under appeal.

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**Map 5: Downtown and Central Waterfront Non-Residential Development Activity**



**Non-Residential GFA Proposed**

Built	Active	Under Review
		5,000 sq m
		25,000 sq m
		50,000 sq m
1,138,537 sq m	1,720,351 sq m	1,223,019 sq m

Source: Land Use Information System II

Development projects with activity between January 1, 2013 and December 31, 2017.

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.

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

	Proposed Residential Units			Proposed Residential GFA (m²)			Proposed Storeys (Tallest Building)	Proposed Buildings
	#	%	%	#	%	%	#	#
<b>Downtown and Central Waterfront</b>	<b>140,116</b>	<b>100.0</b>		<b>10,525,366</b>	<b>100.0</b>			
<b>Proposed Residential Units ≥ 1,000</b>	<b>42,905</b>	<b>30.6</b>		<b>3,265,090</b>	<b>31.0</b>			
<b>Built Projects</b>	<b>3,772</b>	<b>8.8</b>	<b>%</b>	<b>249,034</b>		<b>7.6</b>		
90 HARBOUR ST	1,426		3.3	85,924		2.6	70	3
12 & 14 YORK ST*	1,343		3.1	87,650		2.7	67	2
50 ST JOSEPH ST	1,003		2.3	75,460		2.3	55	2
<b>Active Projects</b>	<b>20,759</b>	<b>48.4</b>	<b>%</b>	<b>1,703,850</b>		<b>52.2</b>		
325 GERRARD ST E	4,705		11.0	469,000		14.4	29	36
55 LAKE SHORE BLVD E	4,369		10.2	340,296		10.4	90	7
266-270 KING ST W	1,953		4.6	138,008		4.2	92	2
261 QUEENS QUAY E**	1,833		4.3	124,565		3.8	4	9
571 DUNDAS ST W	1,823		4.2	199,464		6.1	21	17
177 FRONT ST E	1,531		3.6	107,480		3.3	29	3
6 GLEN RD	1,321		3.1	99,693		3.1	45	4
578 FRONT ST W	1,191		2.8	76,569		2.3	20	4
37 YORKVILLE AVE	1,029		2.4	94,525		2.9	62	1
200 DUNDAS ST E	1,004		2.3	54,250		1.7	45	1
<b>Projects Under Review</b>	<b>18,374</b>	<b>42.8</b>	<b>%</b>	<b>1,312,206</b>		<b>40.2</b>		
1 YONGE ST	2,864		6.7	215,668		6.6	95	4
433 FRONT ST W	2,750		6.4	208,300		6.4	59	0
429 LAKE SHORE BLVD E	2,280		5.3	153,960		4.7	55	13
33 GERRARD ST W	2,138		5.0	127,122		3.9	88	4
400 FRONT ST W	1,937		4.5	144,739		4.4	59	4
245 QUEEN ST E	1,820		4.2	130,797		4.0	56	2
23 SPADINA AVE	1,400		3.3	106,200		3.3	69	1
88 QUEEN ST E	1,126		2.6	85,666		2.6	49	3
2 CARLTON ST	1,046		2.4	68,140		2.1	73	1
309 CHERRY ST	1,013		2.4	71,614		2.2	52	3

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

Development projects with activity between January 1, 2013 and December 31, 2017. 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.

\*Residential portion of a phased project originally submitted as 16 York St.

\*\* Complete Residential GFA information for 261 Queens Quay E is not yet available

A notable amount of non-residential activity is occurring in *Downtown*. In the current Pipeline, there are 24 large projects, each proposing over 50,000 m² of non-residential GFA in the *Downtown and Central Waterfront* area. The proposed non-residential GFA of each of these projects is listed in Table 9 on page 13. Many of the largest projects with non-

residential components are mixed-use projects, proposing large residential development as well. Their non-residential components are mainly office uses, although these projects also include:

- the built Phase II section of the MaRS research and innovation hub at 661 University Avenue;

- the ongoing Union Station Revitalization at 61 Front Street; and
- the approved new courthouse at 11 Centre Avenue.

These projects are in addition to 352 other projects in *Downtown* proposing less than 50,000 m² of non-residential floor space.

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

		Proposed Non-Residential GFA (m²)	Percent
<b>City of Toronto</b>		<b>10,296,517</b>	<b>100.0</b>
<b>Proposed Non-Residential GFA ≥50,000 m²</b>		<b>4,522,694</b>	<b>43.9</b>
<b>Built Projects</b>		<b>945,970</b>	<b>20.9</b>
1201 WILSON AVE	Outside Growth Areas	197,884	4.4
120 BREMNER BLVD	Downtown	98,995	2.2
40 ADELAIDE ST W*	Downtown	94,124	2.1
100 ADELAIDE ST W	Downtown	86,960	1.9
90 HARBOUR ST	Downtown	86,610	1.9
10-20 BAY ST	Downtown	81,772	1.8
661 UNIVERSITY AVE**	Downtown	66,974	1.5
61 FRONT ST W ***	Downtown	65,861	1.5
333 KING ST E****	Downtown	60,028	1.3
674 BAY ST	Downtown	55,615	1.2
30 WESTON RD	Employment Areas	51,147	1.1
<b>Active Projects</b>		<b>1,340,001</b>	<b>29.6</b>
440 FRONT ST W	Downtown	149,163	3.3
45 BAY ST	Downtown	143,196	3.2
141 BAY ST	Downtown	134,397	3.0
156 FRONT ST W	Downtown	115,515	2.6
2233 SHEPPARD AVE W	Employment Areas	102,977	2.3
171 FRONT ST W	Downtown	100,200	2.2
629 EASTERN AVE	Employment Areas	96,715	2.1
880 BAY ST	Downtown	80,622	1.8
55 LAKE SHORE BLVD E	Downtown	80,409	1.8
388 KING ST W	Downtown	74,736	1.7
16 YORK ST*****	Downtown	74,392	1.6
11 CENTRE AVE	Downtown	73,530	1.6
158 STERLING RD	Employment Area	59,857	1.3
1001 QUEEN ST W	Avenues	54,292	1.2
<b>Projects Under Review</b>		<b>2,236,724</b>	<b>49.5</b>
21 DON VALLEY PKWY	Employment Areas	925,314	20.5
25 KING ST W	Downtown	180,259	4.0
82 BUTTONWOOD AVE	Avenues	168,845	3.7
3401 DUFFERIN ST	Outside Growth Areas	160,066	3.5
433 FRONT ST W	Downtown	155,700	3.4
1 YONGE ST	Downtown	141,175	3.1
865 YORK MILLS RD	Employment Areas	85,399	1.9
844 DON MILLS RD	Employment Areas	84,176	1.9
721 EASTERN AVE	Employment Areas	81,925	1.8
900 YORK MILLS RD	Employment Areas	78,495	1.7
40 TEMPERANCE ST*****	Downtown	75,322	1.7
517 WELLINGTON ST W	Downtown	50,030	1.1
2200 ISLINGTON AVE	Employment Areas	50,018	1.1
<b>Proposed Non-Res GFA between 10,000 m² and 49,999 m²</b>		<b>3,358,508</b>	<b>32.6</b>
<b>Proposed Non-Res GFA less than 10,000 m²</b>		<b>2,415,314</b>	<b>23.5</b>

Source: City of Toronto, City Planning: Land Use Information System II. Development projects with activity between January 1, 2013 and December 31, 2017. 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. \* Phase 2 of a larger 3 phase including 40 Adelaide St. W, 40 Temperance St. and 333 Bay St. project \*\*Second phase of the MARS project \*\*\*Union Station Revitalization project has become partially ready for occupancy although substantial work is still outstanding. \*\*\*\*First phase of this project is ready for occupancy but the second phase has yet to be submitted. Gross floor area includes both phases. \*\*\*\*\*Phase 3 of a larger 3 phase project. \*\*\*\*\*Phase 3 of a larger 3 phase including 40 Adelaide St. W, 40 Temperance St. and 333 Bay St. project

Map 5 shows a strong north-south trend of recent non-residential development between University Avenue and Yonge Street, with the largest built projects located in this corridor. There has been a shift in the non-residential market towards a more east-west pattern of development, with all of the largest active projects and projects under review proposed south of Dundas Street. Many of these are large, phased, mixed-use projects, proposed mainly on lands designated as mixed-use or regeneration areas and in Secondary Plan areas that permit both residential and non-residential development.

## Centres

The four *Centres* are focal points of transit infrastructure where jobs, housing and services are concentrated. They are vital to the City's growth management strategy. There are 95 projects in the development Pipeline that are located in the *Centres* and which contain 9.5% of the city's proposed residential units. About 35,623 units as well as 274,709 m<sup>2</sup> of non-residential GFA proposed in the *Centres*. Since, 80% of proposed residential units and 69% of the proposed non-residential GFA in the *Centres* are either approved but not yet built or under review, there is likely to be substantial residential and non-residential construction in the *Centres* in coming years.

The residential projects in the *Centres* are generally high-density developments with an average of 375 residential units per project. This is the highest average project size in the growth management areas. It is higher than *Downtown*, which has an average of 303 units per residential project.

Strong residential development activity is occurring within the boundaries of *Yonge-Eglinton Centre*. With 14,567 units proposed, *Yonge-Eglinton Centre* contains over 40% of the residential units in the Pipeline within the *Centres*. Non-residential development in the *Centres* is strongest in *North York Centre* where there is 110,719 m<sup>2</sup> of non-residential GFA in the

Pipeline or 40% of all non-residential GFA proposed within the *Centres*. More than 40% of the proposed non-residential development in *North York Centre* is already built.

## Avenues

The *Avenues* are important corridors along major streets well served by transit which are expected to redevelop incrementally over time. They are an effective alternative to *Downtown* and the *Centres* for redevelopment. The *Avenues* have 81,501 units and 698,670 m<sup>2</sup> of non-residential GFA proposed in the development Pipeline. This represents 22% of the city's proposed units and 7% of its proposed non-residential GFA.

Roughly equal numbers of residential units are active and under review totalling nearly double the amount of units that were built in *Avenues* over the past five years. This includes a number of 1,000+ unit projects with multiple phases and with some Planning approvals which will continue through approval processes and construction for several years. This trend points to an ongoing strength in residential development along the *Avenues*.

Nearly half of all non-residential development is under review compared to that which is active or built. Some 328,100 m<sup>2</sup> or 47% of proposed non-residential GFA in the *Avenues* is still under review or appealed indicating that there is likely to be substantial non-residential construction in the years to come.

## Other Mixed Use Areas

Outside of *Downtown*, the *Centres* and the *Avenues*, there are numerous other locations throughout the city that are designated as *Mixed Use Areas*, which encourage a broad range of commercial, residential and institutional uses, such as local shopping areas along minor arterial roads. These additional *Mixed Use Areas* have another 55,873 units and 976,274 m<sup>2</sup> of non-residential GFA proposed. This accounts for 15%

of the city's proposed residential units and 10% of its proposed non-residential GFA. Over 80% of the proposed residential units in these areas are either under review or active whereas the proposed non-residential development is more evenly split between the built, active, and under review statuses, indicating future residential construction activity in these areas near term.

## All Other Areas

Nearly 63,400 units or 17% of the units proposed in the city are outside of the growth areas of *Downtown*, the *Centres*, the *Avenues* and other *Mixed Use Areas*. These projects are generally smaller replacement or infill projects proposing fewer than 100 units on average, in areas designated as Neighbourhoods. Nearly half (45%) of the residential units proposed in All Other Areas are under review (see Table 4).

There is 4.3 million m<sup>2</sup> of non-residential GFA proposed in these Other Areas. Three-quarters of this 3.15 million m<sup>2</sup> is located in the *Core* or *General Employment Areas* which the Official Plan also targets for non-residential growth. Half (51%) of non-residential GFA proposed in All Other Areas are under review.

## Secondary Plan Areas

Secondary Plans guide development and investment within a local context. The Secondary Plan areas cover a wide range of geographies within the city and can be comprised of a mix of land use designations where development may be encouraged. Some Secondary Plans also overlap areas covered by other Official Plan policies such as for *Downtown*, the *Centres* and the *Avenues*. Map 6 (on page 15) displays the areas of the in-force Secondary Plans and the locations of development projects within each one.

As seen in Table 10, 869 projects or 36% of all projects in the Pipeline are proposed in Secondary Plan areas. These projects propose 242,140 residential units and 5.26 million m<sup>2</sup> of



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**Table 10: Proposed Development in Secondary Plan Areas**

	Proposed Residential		Proposed Non-Residential			
	Number of Projects	%	Units	%	GFA (m <sup>2</sup> )	%
<b>City of Toronto</b>	<b>2,407</b>		<b>376,480</b>		<b>10,296,517</b>	
<b>Secondary Plans</b>	<b>869</b>	<b>36.1</b>	<b>242,140</b>	<b>64.3</b>	<b>5,263,590</b>	<b>51.1</b>
	Proposed Residential		Proposed Non-Residential			
	Number of Projects	%	Units	%	GFA (m <sup>2</sup> )	%
<b>Secondary Plans within Downtown</b>	<b>440</b>	<b>50.6</b>	<b>135,505</b>	<b>56</b>	<b>3,970,197</b>	<b>75</b>
King-Parliament	40	4.6	12,984	5.4	254,663	4.8
King-Spadina	91	10.5	28,123	11.6	661,808	12.6
Railway Lands Central	3	0.3	4,150	1.7	170,846	3.2
Railway Lands East	8	0.9	2,049	0.8	534,010	10.1
Railway Lands West	8	0.9	2,853	1.2	20,085	0.4
Regent Park	9	1.0	6,133	2.5	23,019	0.4
Queen River	4	0.5	1,217	0.5	6,518	0.1
University of Toronto	11	1.3	1,277	0.5	51,012	1.0
Downtown Plan	266	30.6	76,719	31.7	2,248,235	42.7
<b>Secondary Plans outside Downtown</b>						
Agincourt	8	0.9	8,414	3.5	44,363	0.8
Central Don Mills	7	0.8	2,381	1.0	38,371	0.7
Central Finch	26	3.0	523	0.2	5,143	0.1
Davenport Village	4	0.5	1,281	0.5	0	0.0
Downsview Area	9	1.0	1,355	0.6	76,626	1.5
Emery Village	5	0.6	1,686	0.7	2,948	0.1
Etobicoke Centre	21	2.4	4,070	1.7	21,384	0.4
Fort York Neighbourhood	10	1.2	3,258	1.3	29,721	0.6
Garrison Common North	45	5.2	11,896	4.9	246,594	4.7
Highland Creek	16	1.8	174	0.1	76,132	1.4
Lawrence-Allen	18	2.1	4,834	2.0	202,986	3.9
Mimico-by-the-Lake	3	0.3	373	0.2	3,704	0.1
Morningside Heights	8	0.9	157	0.1	25,583	0.5
Motel Strip	8	0.9	5,229	2.2	23,532	0.4
North York Centre	30	3.5	7,647	3.2	110,719	2.1
Port Union Village Community	1	0.1	101	0.0	0	0.0
Scarborough Centre	9	1.0	9,339	3.9	53,006	1.0
Sheppard Avenue Commercial Area	13	1.5	513	0.2	10,304	0.2
Sheppard East Subway Corridor	48	5.5	15,388	6.4	59,800	1.1
Sheppard West/Dublin	12	1.4	1,117	0.5	8,298	0.2
Swansea	13	1.5	2,295	0.9	10,434	0.2
Warden Woods	8	0.9	593	0.2	9,300	0.2
Yonge-Eglinton*	83	9.6	21,659	8.9	164,823	3.1
Yonge St. Clair	17	2.0	1,865	0.8	20,727	0.4
York University	7	0.8	487	0.2	48,896	0.9
<b>Status</b>	<b>869</b>	<b>100.0</b>	<b>242,140</b>	<b>100.0</b>	<b>5,263,590</b>	<b>100.0</b>
Built	273	31.4	63,434	26.2	1,377,910	26.2
Active (approved but not yet built)	296	34.1	97,433	40.2	2,102,630	39.9
Under Review (not approved)	300	34.5	81,273	33.6	1,783,049	33.9

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

Development projects with activity between January 1, 2013 and December 31, 2017. 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. Note 1: 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. Note 2: The sum of each column may not add up to the totals of all the Secondary Plans because of the overlapping boundaries of the Sheppard Avenue Commercial Area Secondary Plan and the Sheppard East Subway Corridor Secondary Plan. The same project may appear in more than one Secondary Plan. \*Yonge Eglinton Secondary Plan geography is currently under review.

non-residential GFA. This represents 64% of the residential units and more than half (51%) of the non-residential GFA proposed in the entire city. There are slightly more active projects proposing residential units (40%) than under review (34%) in the Secondary Plan Areas versus those that are built (26%). Almost two thirds of the proposed non-residential development in Secondary Plan Areas is active or under review.

Some areas covered by a Secondary Plan fall outside of the other growth areas reported on earlier in this bulletin. There are 15,615 residential units and 387,473 m<sup>2</sup> of non-residential GFA proposed in All Other Areas of the city. If this development were added to the development proposed in *Downtown, Centres, Avenues*, and other *Mixed Use Areas*, 87% of the residential units and 62% of the non-residential GFA in the Pipeline would be proposed in either a growth management area or a Secondary Plan area. If non-residential development in *Employment Areas* is also included, the percentage of non-residential development occurring in an area targeted for growth rises to 93%.

### The Downtown Area Plan

The Downtown Plan was adopted by Council with amendments at its meeting on May 22<sup>nd</sup>, 23<sup>rd</sup> and 24<sup>th</sup>, 2018. This new Secondary Plan area for *Downtown* (excluding the *Central Waterfront* area) provides an updated growth management framework for this rapidly changing area.<sup>4</sup>

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 future growth area which represents the most prominent location for development activity across the City and is located within the City's most dense growth area.

The Downtown Plan is the largest Secondary Plan in the city and it is unique as a local and national

economic hub. Table 10 and Map 6 show that the Downtown Plan area contains 8 Secondary Plans within its borders as well as a portion of the proposed Central Waterfront Secondary Plan Area. The Downtown Plan area contains the greatest number of development projects of all the Secondary Plan areas (440), proposing 135,505 residential units, accounting for 56% of all residential units proposed in Secondary Plan areas and 36% of all proposed residential units in the city. The new Downtown Plan area contains nearly 4 million m<sup>2</sup> of non-residential GFA accounting for 75% of all proposed non-residential GFA in Secondary Plan areas.

### Secondary Plan Areas within the Downtown Plan Area

The King-Spadina Secondary Plan area continues to attract a significant amount of development activity in the current Pipeline with 28,123 residential units and 661,808 m<sup>2</sup> of non-residential GFA proposed in this area. The King-Spadina Secondary Plan area, which is located within the Downtown Plan area, runs from Bathurst Street in the west to John Street and Simcoe Street in the east, and between Queen Street West in the north and Front Street West in the south. It is one of the smaller Secondary Plan areas at 84.5 hectares. The major objectives of this Plan are to attract new investment with a mixture of compatible land uses to the area, while recognizing the importance of maintaining employment uses and protecting its heritage buildings.<sup>5</sup>

The Railway Lands East Secondary Plan has also undergone significant non-residential development, with 534,010 m<sup>2</sup> or 10% of the non-residential GFA proposed in all the Secondary Plan areas. This Plan is located between John Street and Yonge Street, Front Street West and the Gardiner Expressway. Major objectives of this Secondary Plan include mandating that new development be mixed-use, satisfying a broad range of commercial,

residential, institutional, cultural, recreational, and open space needs.<sup>6</sup>

### Selected Secondary Plan Areas Outside Downtown and Central Waterfront

In addition to the Downtown Plan, the Yonge-Eglinton Secondary Plan is currently under review through the Midtown in Focus Study.<sup>7</sup>

The proposed Yonge-Eglinton Secondary Plan area proposes changes to the existing Secondary Plan boundary, resulting in an area 9% smaller. Despite this reduced geography, the proposed Yonge-Eglinton Secondary Plan area contains the most development projects outside of the *Downtown and Central Waterfront* area, accounting for nearly 22,000 proposed residential units and 164,823 m<sup>2</sup> of non-residential GFA. The proposed Yonge-Eglinton Secondary Plan area accounts for 9% of proposed residential units within all Secondary Plan areas.

The Garrison Common North Secondary Plan has successfully 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.<sup>8</sup> The area, which includes Liberty Village and the CAMH Queen Street site, contains 5% of the proposed residential units and 5% of the proposed non-residential GFA in all Secondary Plan Areas. The Sheppard East Subway Corridor Secondary Plan area has also attracted a significant amount of development, with 15,388 residential units proposed. Non-residential development is also occurring in this area, to a lesser extent.

## 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."<sup>9</sup> In 2011, the City commenced its Municipal Comprehensive Review (MCR) of employment lands as required by

the *Places to Grow Act*.<sup>10</sup> The MCR concluded in 2013, with Council's adoption of Official Plan Amendment 231 (OPA 231)<sup>11</sup> which received Ministerial approval in part (with minor modifications) in July 2014.

OPA 231 includes new policies for the City's Economic Health and lands designated as *Employment Areas*, representing the policy direction of the City. OPA 231 was appealed to the Ontario Municipal Board (now the Local Planning Appeal Tribunal or LPAT) in 2014; some policies are still under appeal while others are in force and effect.

### Development in Employment Areas

The Development Pipeline covers development activity during the years 2013 to 2017. 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 parts of OPA 231, deleting the term *Employment Districts* within Chapter 2 and regarding the Urban Structure 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.<sup>12</sup> Previously; Toronto had been no different than these other cities. Employment in the Manufacturing sector in Toronto had been decreasing almost every year since 1983, from 22% to 8% of all jobs in 2016.<sup>13</sup> However, the 2017 Toronto Employment Survey reported an increase in Manufacturing employment adding 8,260 jobs over 2016 and growing by 6.7%. In 2017, the Manufacturing sector accounted for 21% of all the jobs in the *Employment Areas* and 92% of Manufacturing jobs in the city were located in *Employment Areas*.<sup>14</sup> At the same time, Toronto's employment activity in *Employment Areas* has grown and diversified.

*Employment Areas* are attractive locations for the creation of new businesses, with 32% of new establishments in the city in 2017 locating in *Employment Areas*.<sup>15</sup> With 1.72 million jobs forecasted for the city of Toronto by 2041,<sup>16</sup> the protection and enhancement of the *Employment Areas* is vital to the city's economic health.

Between 2013 and 2017, *Employment Areas* contained 3.15 million m<sup>2</sup> or 31% of the city's proposed non-residential GFA (see Maps 7 and 8 on pages 19 and 20 and Table 11 on page 21). By 2017 year-end, 36% of these projects had been built, which amounts to 566,522 m<sup>2</sup> of new, non-residential floor space in 107 different projects.

As development progresses on projects that have been approved, another 791,528 m<sup>2</sup> of non-residential GFA in 106 projects are expected to be constructed in *Employment Areas*. A further 82 projects with 1,793,378 m<sup>2</sup> of non-residential GFA is under review and may eventually be approved and constructed in *Employment Areas*.

### Core 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 general 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 the certainty of uses surrounding their operations. 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 and vertical agriculture.<sup>17</sup>

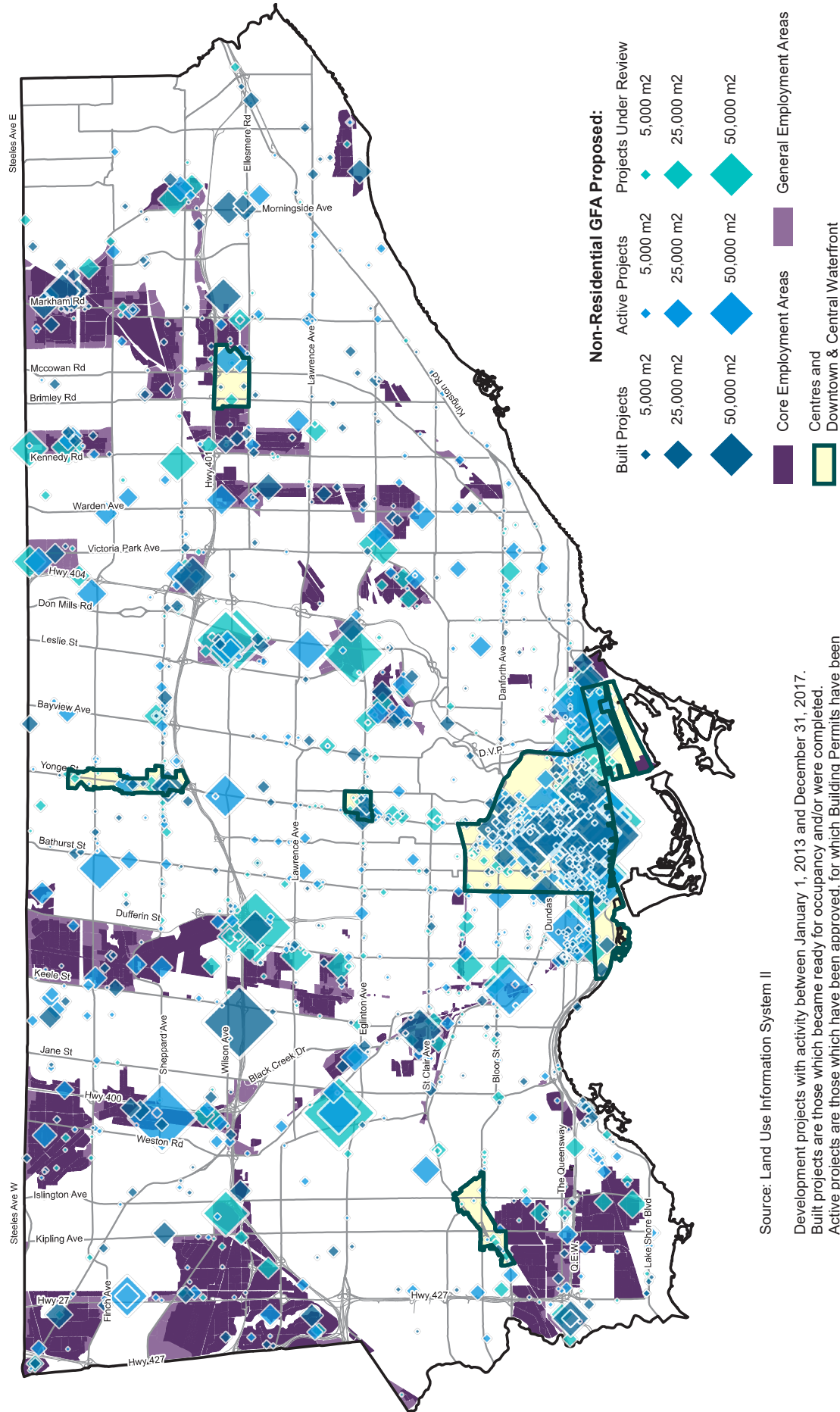
*General Employment Areas* are usually located on the periphery of *Employment Areas* on major roads where retail stores, service shops and restaurants can serve workers in the *Employment Areas* and would also benefit from visibility and transit access to draw the broader public. Uses permitted in *General Employment Areas* include all those permitted in *Core Employment Areas*, as well as restaurants, retail and service uses.<sup>18</sup>

In *Core Employment Areas*, the non-residential GFA proposed between 2013 and 2017 is roughly equal across the three statuses of built, active, and under review, indicating steady development interest and investment in these areas. In the *General Employment Areas*, projects are increasing in size. There are more built projects in these areas than active projects, and more active projects than under review projects. The projects under review are proposing two and a half times as much non-residential GFA compared to that in the built and active projects. This points to the market's continued interest in non-residential GFA. The varying market demands demonstrate the need to preserve the city's employment lands for business and future job growth.

### Sectoral Composition

The *Employment Areas* provide an attractive location for employment related development projects. The projects proposed in the *Employment Areas* are primarily comprised of proposed office GFA (39%), industrial GFA (23%) and retail GFA (20%).

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 development of a buffer between potentially impactful operations in *Core Employment Areas* and nearby land use designations that permit sensitive uses, including residential.



Source: Land Use Information System II

Development projects with activity between January 1, 2013 and December 31, 2017.

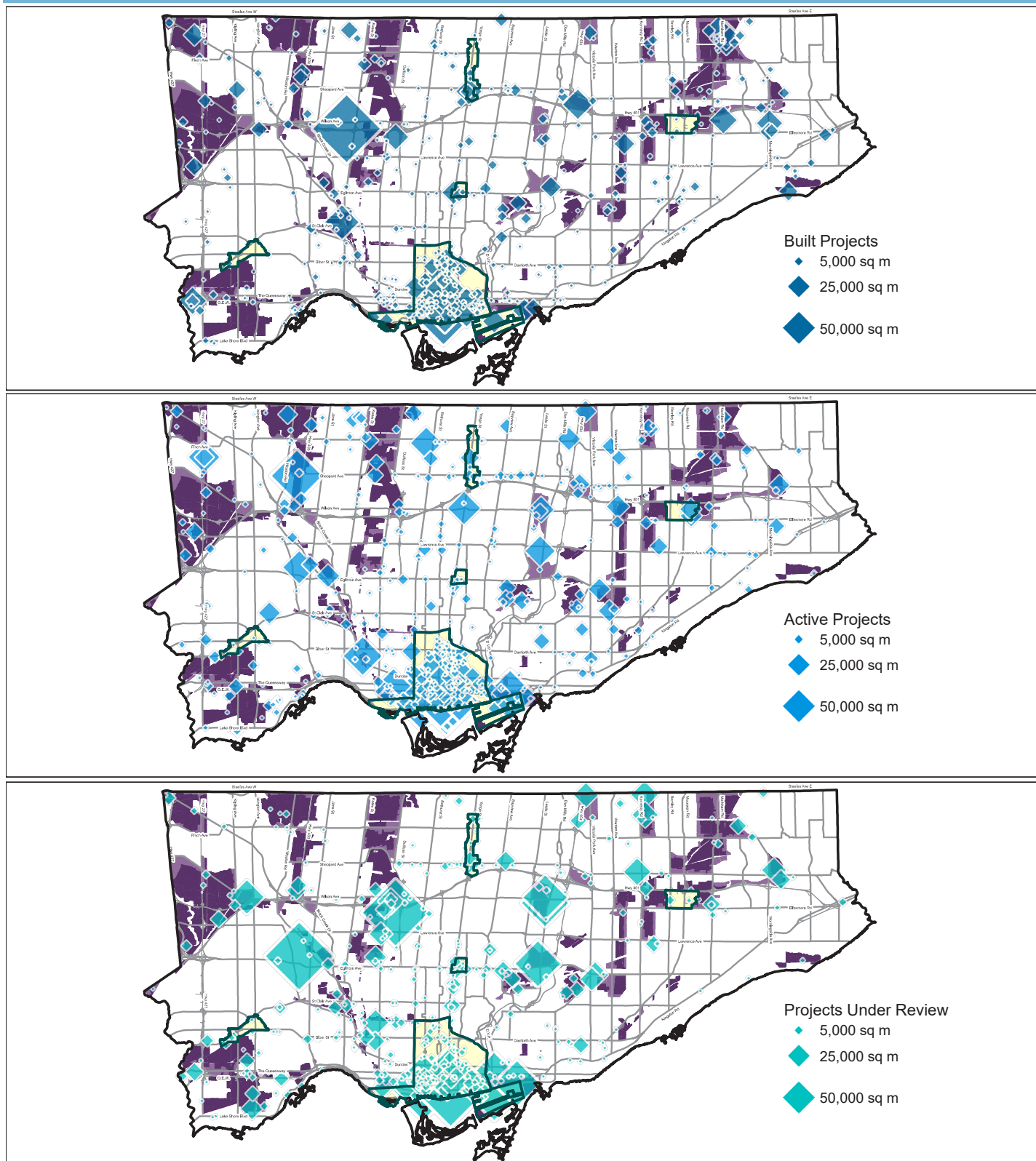
Built projects are those which became ready for occupancy and/or were completed.

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.

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**Map 8: City of Toronto Proposed Non-Residential Development**



Source: Land Use Information System II  
Development projects with activity between January 1, 2013 and December 31, 2017.  
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.

Core Employment Areas  
General Employment Areas  
Centres and Downtown & Central Waterfront

**Table 11: Proposed Development in Employment Areas by Status**

	Projects		Proposed Non-Residential Gross Floor Area		
	Number	Percent	Number	Percent	
<b>City of Toronto</b>	<b>2,407</b>		<b>10,296,517</b>	<b>100.0</b>	
<b>Total Employment Areas</b>	<b>295</b>	<b>100.0</b>	<b>3,151,428</b>	<b>30.6</b>	<b>100.0</b>
Built	107	36.3	566,522		18.0
Active	106	35.9	791,528		25.1
Under Review	82	27.8	1,793,378		56.9
<b>Within Employment Lands</b>	<b>295</b>	<b>100.0</b>	<b>3,151,428</b>	<b>100.0</b>	
<b>Core Employment Areas</b>	<b>157</b>	<b>53.2</b>	<b>1,225,978</b>	<b>38.9</b>	<b>100.0</b>
Built	51	32.5	279,304		22.8
Active	61	38.9	527,679		43.0
Under Review	45	28.7	418,995		34.2
<b>General Employment Areas</b>	<b>138</b>	<b>46.8</b>	<b>1,925,450</b>	<b>61.1</b>	<b>100.0</b>
Built	56	40.6	287,218		14.9
Active	45	32.6	263,849		13.7
Under Review	37	26.8	1,374,383		71.4

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

Development projects with activity between January 1, 2013 and December 31, 2017. 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 majority of retail GFA proposed for *Employment Areas* is concentrated in *General Employment Areas*.

*Employment Areas* continue to provide an attractive location for projects which include industrial GFA. The current Pipeline contains 865,174 m<sup>2</sup> of proposed new industrial GFA, 84% of which is located in the *Employment Areas*. The majority of the industrial GFA, 89%, is proposed in *Core Employment Areas* while 11% is proposed in *General Employment Areas*.

In *Core Employment Areas*, over half of all proposed GFA is industrial totalling 644,505 m<sup>2</sup>. About 80% of all GFA built in *Core Employment Areas* over the last five years is industrial GFA accounting for 218,322 m<sup>2</sup> of industrial GFA (see Figure 5). An additional 161,506 m<sup>2</sup> of proposed industrial GFA is under review.

*Employment Areas* provide an attractive location for office-related projects. About 39% of all proposed GFA in the *Employment Areas* is proposed office GFA, accounting for 1.2 million m<sup>2</sup>. While both *Core and General Employment Areas* attract

**Table 12: Proposed GFA in Employment Areas by Type**

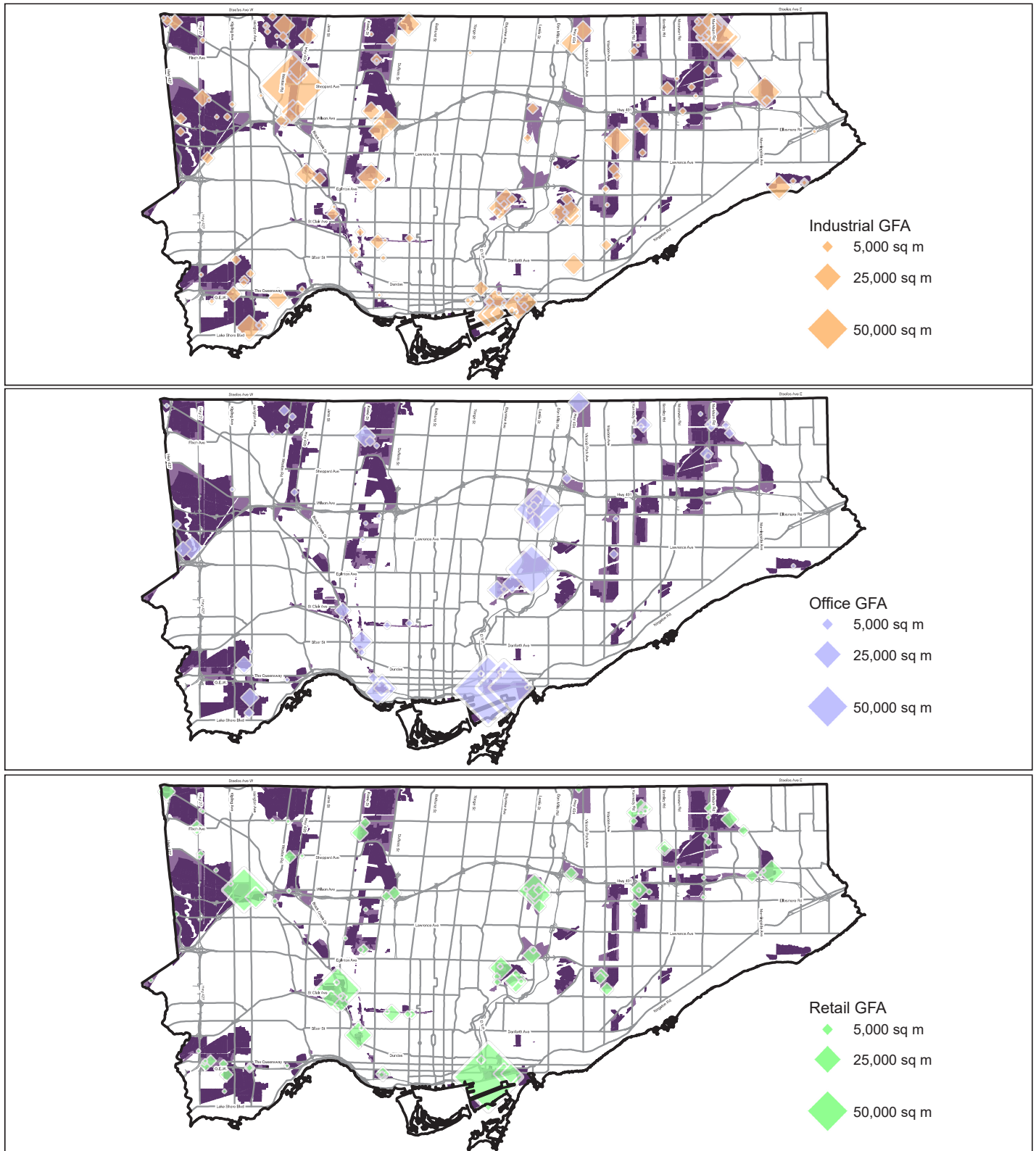
	Total Non-Residential		Industrial		Office		Retail		Other	
	Number	%	Number	%	Number	%	Number	%	Number	%
<b>Total Employment Areas</b>	<b>3,151,428</b>	<b>100.0</b>	<b>727,707</b>	<b>100.0</b>	<b>1,219,043</b>	<b>100.0</b>	<b>645,661</b>	<b>100.0</b>	<b>559,017</b>	<b>100.0</b>
Built	566,522	18.0	259,013	35.6	67,577	5.5	158,126	24.5	81,806	14.6
Active	791,528	25.1	286,165	39.3	139,960	11.5	170,708	26.4	194,695	34.8
Under Review	1,793,378	56.9	182,529	25.1	1,011,506	83.0	316,827	49.1	282,516	50.5
<b>Core Employment</b>	<b>1,225,978</b>	<b>38.9</b>	<b>644,505</b>	<b>88.6</b>	<b>271,983</b>	<b>22.3</b>	<b>82,853</b>	<b>12.8</b>	<b>226,637</b>	<b>40.5</b>
Built	279,304	22.8	218,322	33.9	35,738	13.1	16,668	20.1	8,576	3.8
Active	527,679	43.0	264,677	41.1	110,845	40.8	34,543	41.7	117,614	51.9
Under Review	418,995	34.2	161,506	25.1	125,400	46.1	31,642	38.2	100,447	44.3
<b>General Employment</b>	<b>1,925,450</b>	<b>61.1</b>	<b>83,202</b>	<b>11.4</b>	<b>947,060</b>	<b>77.7</b>	<b>562,808</b>	<b>87.2</b>	<b>332,380</b>	<b>59.5</b>
Built	287,218	14.9	40,691	48.9	31,839	3.4	141,458	25.1	73,230	22.0
Active	263,849	13.7	21,488	25.8	29,115	3.1	136,165	24.2	77,081	23.2
Under Review	1,374,383	71.4	21,023	25.3	886,106	93.6	285,185	50.7	182,069	54.8

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

Development projects with activity between January 1, 2013 and December 31, 2017. 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.

Map 9: City of Toronto Proposed GFA in Employment Areas by Sector



Source: Land Use Information System II  
Development projects with activity between January 1, 2013 and December 31, 2017.  
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Core Employment Areas  
General Employment Areas

office GFA, *General Employment Areas* have attracted 78% of proposed office GFA or 974,060 m<sup>2</sup>. Over the last five years, 67,577 m<sup>2</sup> of office GFA has been constructed. *Employment Areas* continue to provide an attractive location for office-related projects with over 1 million m<sup>2</sup> of office GFA currently under review. This is reflected in the growing number of Office jobs located in the *Employment Areas*. In 2017, the Toronto Employment Survey recorded 163,932 Office jobs in *Employment Areas*,

accounting for 22% of Toronto's Office employment and 10% of Toronto's Professional, Scientific and Technical Services jobs (41,644 jobs).

## Mid-rise Development in Toronto

Over the last five years, there were 347 mid-rise projects submitted to the City Planning Division for review and approval. These projects proposed over 32,000 residential units and 1.14 million m<sup>2</sup> of non-residential GFA.

Nearly half of the proposed mid-rise projects are along the *Avenues* totaling 15,241 units and nearly 300,000 m<sup>2</sup> of non-residential GFA (see Map 10). Of the 15,241 units in the development Pipeline along the *Avenues*, about 2 in 10 are built, 4 in 10 are active, and the remaining 4 in 10 are under review.

Built mid-rise projects are concentrated in Downtown, along Yonge Street and along the Sheppard Corridor. More recent mid-rise development proposals that are active and under review are more dispersed and further away from Downtown yet tend to be along the *Avenues* reflecting Official Plan policies.

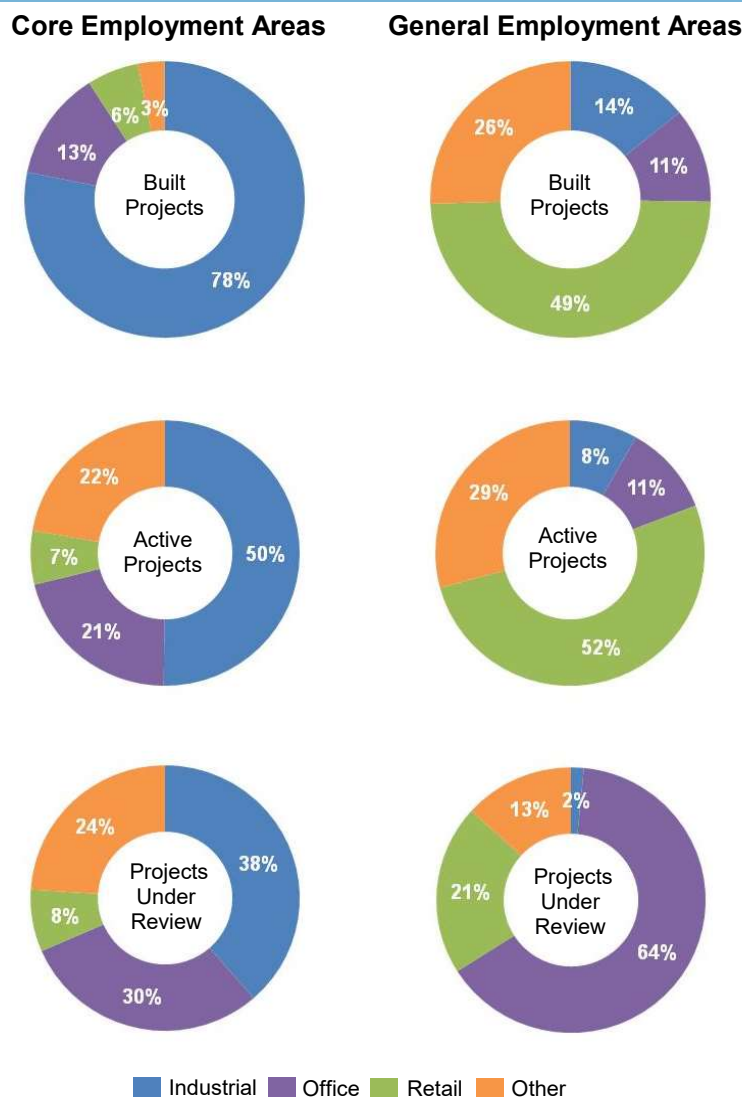
Over a quarter of mid-rise projects are located outside of areas that are targeted for growth by the City's Official Plan. These mid-rise projects account for over 7,700 units and close to 600,000 m<sup>2</sup> of non-residential GFA.

## Mid-rise along the Avenues and the Impact of Avenue Studies

The Official Plan policies call for Avenue Studies to facilitate and shape development along the *Avenues* resulting in an Avenue specific zoning by-law. To date, 18 Avenue Studies have been completed resulting in by-laws. So far, 16% of the land parcels associated with the *Avenues* have been subject to an Avenue study and subsequently have by-laws in force, and 23% of mid-rise associated units along the *Avenues* reside on these by-law enforced lands.

Mid-rise projects residing on *Avenues* with by-laws in force propose on average more units per project with 110 units per project versus 84 units per project respectively. As a result, 34% of mid-rise units built along the *Avenues* are on lands with bylaws in force. Further, the *Avenues* associated land parcels that have been subject to an Avenue study are attracting more mid-rise projects over time, accounting 27% of the mid-rise units currently under review and 36% of mid-rise non-residential GFA currently under review. Mid-rise projects along the *Avenues* on by-law enforced lands are subject

**Figure 5: Proposed Non-Residential Gross Floor Area in Employment Areas by Status**

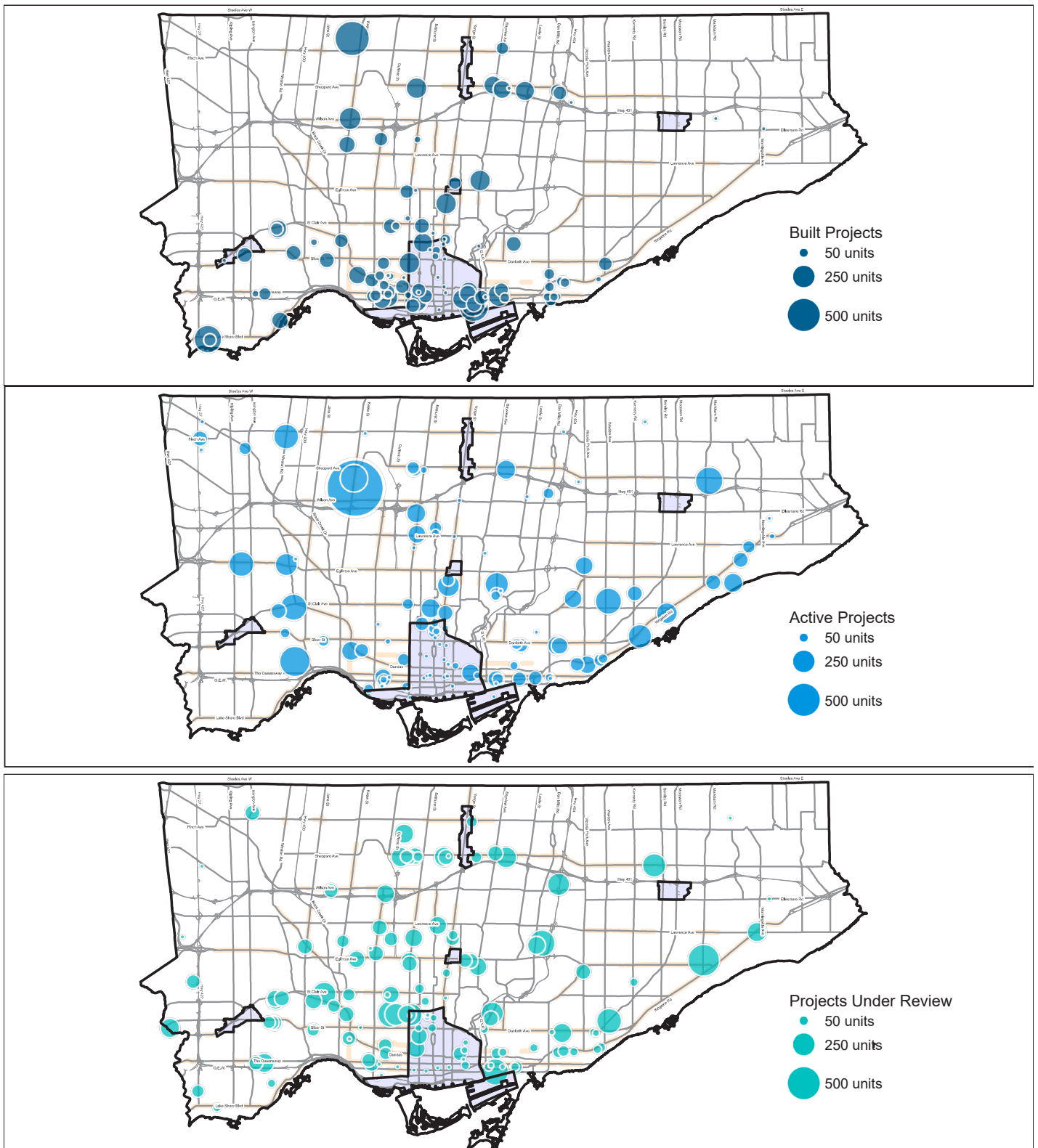


Source: City of Toronto, City Planning : Land Use Information System II.

Development projects with activity between January 1, 2013 and December 31, 2017. 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: The Employment Areas figure 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.

**Map 10: City of Toronto Proposed Mid-Rise Development by Status**



Source: Land Use Information System II

**Mid-rise is defined as a development project for which the tallest proposed building is between 5 and 11 storeys.**

Development projects with activity between January 1, 2013 and December 31, 2017.

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.

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- Avenues
- Centres and Downtown & Central Waterfront

to substantially fewer re-zonings and OPAs compared to the rest of the Avenues with 44% versus 79%.

## Toronto Non-Residential Market

The city's non-residential market remains strong, mainly consisting of office space but also including other uses such as retail, institutional and hotels. There was 4,522,694 m<sup>2</sup> constructed in projects larger than 50,000 m<sup>2</sup> (see Table 9). All of the projects were built and ready for occupancy before 2017.

There has been a strong demand for non-residential space in the Toronto market. Although there was no new non-residential GFA completed in Toronto in 2017, the 2017 Q4 net office absorption decreased to 222,979 m<sup>2</sup> compared to 263,954 m<sup>2</sup> in 2016 in Central Toronto.<sup>19</sup> Office vacancy rates across the GTA decreased to 8.6%, well below the Canada-wide rate of 13.0%.<sup>20</sup> Office vacancy rates in Downtown Toronto decreased to an all-time low of 3.7%, which according to CBRE, was the lowest downtown vacancy rate of all major markets in North America.<sup>21</sup> This was specifically due to 100 University Avenue which saw a large block of space come off the market due to a significant lease transaction.<sup>22</sup> The industrial vacancy rate for the city of Toronto was 0.5% versus 0.8% for the GTA as a whole.<sup>23</sup>

The trend toward significant office construction is continuing. There is more active non-residential development proposed than what was built in the last five years (an increase of nearly 4% of total proposed GFA). These projects have at least one Planning approval and are proceeding through Site Plan approvals or Building Permit approvals. The fact that applicants are pursuing large new projects as others are being completed points to a continuing demand for non-residential space in the city generally and in Downtown<sup>24</sup> in particular. CBRE states that Downtown is officially beginning a new development cycle as several major projects have been

announced through 2017.<sup>25</sup> The developments at 25 King St, 433 Front St W, and 517 Wellington St W were all under review as of 2017. Market conditions are expected to remain tight until this new supply is delivered in 2020. CBRE opines that the current tight supply of office space Downtown may kick-start the next wave of office development.<sup>26</sup>

A number of large non-residential projects are active or under review. Table 9 breaks down the largest proposed non-residential space by status and location. All but one of the top five largest active projects are in

### Downtown:

- 440 Front Street West, the former site of the Globe and Mail, which proposes seven mixed use buildings and 105,364 m<sup>2</sup> of office space and 44,824 m<sup>2</sup> of retail space;
- 45 Bay Street, which includes a major office tower, an elevated park over a rail corridor and the GO bus terminal integrated into the project;
- 141 Bay Street, the second phase of the development at 45 Bay Street, proposing a 53-storey office tower;

## Sidebar: Housing in Toronto and the GTA

The city continues to grow; according to the 2016 Census, the number of occupied private dwellings increased by 65,052 between 2011 and 2016. Canada Mortgage and Housing Corporation (CMHC) reports that 84,748 dwelling units were completed in the city during the same period (May 2011 to April 2016). This does not include demolitions, which would indicate somewhat fewer net new units. The 2016 Census reports fewer units occupied than were completed. However, Statistics Canada's Annual Demographic Estimate for 2016 identified 144,524 more people living in Toronto than were captured in the 2016 Census<sup>1,2</sup>. Moreover, the 2016 Census counted 66,128 unoccupied dwellings in Toronto. This suggests that the Census may have missed a significant number of people in dwelling units that may have existed at the time of the 2016 Census but were not classified as "occupied" at that time. This in turn suggests a higher net undercount in the 2016 Census for Toronto and possibly a higher actual total number of occupied dwelling units than was reported in the 2016 Census.

The city continues to be an exceptionally attractive location for residential development in the Greater Toronto Area (GTA). According to CMHC, Toronto has represented an average of about 32% of the housing completions in the GTA since 1988 (see Table 6). Toronto's housing construction has recovered from the 2008 global recession (see Figure 8 in the appendix). The number of units completed in 2015 was more than double the average number of units completed annually over the past 10 years. After this record-setting year, the number of completions in Toronto returned to more typical levels in 2016 and 2017. In 2017 there were 14,171 housing completions, the fifth highest number of completions in Toronto since 1988.

High-density condominium apartments continue to dominate the new construction landscape in Toronto. CMHC recorded 85,040 residential units completed in Toronto between 2013 and 2017 inclusive and 84% of these units were condominium apartments, an all-time high in Toronto's development history.<sup>3</sup> In the GTA outside of Toronto, condominium apartments only comprise 24% of units completed in the last five years.

1 Statistics Canada, 2016 Census.

2 Statistics Canada, *Annual Demographic Estimates*, 91-214-X

3 Canada Mortgage and Housing Corporation, *Housing Now – Greater Toronto Area Reports*.

- 156 Front Street West, a 46-storey office tower; and
- 2233 Sheppard Avenue West, a proposed industrial park with 3 industrial buildings

In addition, there are six large non-residential projects are under review, half of which are in *Downtown*:

- East Harbour at 21 Don Valley Parkway, which proposes to redevelop the Unilever site into a major retail, office, and transportation hub;
- 25 King Street West, a 64-storey office building and addition to Hotel Victoria;
- 82 Buttonwood Avenue, the redevelopment of West Park Health Care Centre and other institutional uses;
- 3401 Dufferin Street, a phased mixed use plan for Yorkdale Shopping Centre site to include retail, office, hotel and residential uses;
- 433 Front Street West, the development of a rail corridor overbuild and 8 mixed-use buildings; and
- 1 Yonge Street, which retains the existing Toronto Star office building and adds several mixed-use towers.

*Downtown* accounts for 67% of the office space currently under construction in the GTA.<sup>27</sup> The 905 markets now account for the bulk of the remainder of the office space currently under construction, in Highway 10 / Highway 401 Area, Vaughan and Oakville.<sup>28</sup>

## Population

### Population and Employment

It is important to understand Toronto's development activity in the context of its population and employment. The Growth Plan for the Greater Golden Horseshoe, brought into force by the Provincial Government in June 2006, manages growth and development throughout the region that stretches around Lake Ontario from Niagara

Falls to Peterborough, with Toronto at its centre. The Growth Plan, 2017, forecasts 3.40 million people and 1.72 million jobs in the city of Toronto by 2041.<sup>29</sup>

The city's population is on track with the population forecasts in the Growth Plan. The forecast background study supporting the Growth Plan anticipated a 2016 population including Census undercoverage of 2,865,000. The 2016 Census by Statistics Canada indicates the city's 2016 population is was 2,731,571 in 2016. These forecasts were the basis of the Growth Plan, 2006 as amended in 2013. These same forecasts appear in Schedule 3 of the Growth Plan, 2017. According to Statistics Canada's latest population estimates released on February 13, 2018, the City's population in 2016 is estimated to be 2,871,146.<sup>30</sup> This represents 6.2% growth over 2011. This is 6,146 people above the forecasts supporting the Provincial Growth Plan. Thus Statistics Canada's latest population estimate places City's growth firmly on track with the forecasts supporting the Growth Plan, if not slightly ahead.

## Employment

Each year for the past 35 years, the City Planning Division has conducted the Toronto Employment Survey, collecting employment information from each business establishment in the city. There were 75,620 business establishments counted in 2017. The Toronto Employment Survey does not capture the growing number of people who work at 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 forecasts supporting the Growth Plan, Toronto will need to add approximately 6,670 new jobs each year between 2011 and 2041 to reach the Growth Plan employment forecast.<sup>31</sup> According to the results of the 2017 Toronto Employment Survey, the city grew at an average rate of 13,660 jobs over the past 16 years since 2001, more than double the rate

anticipated by the Growth Plan. This has risen to 21,700 jobs per annum over the past decade, more than triple the Growth Plan rate. If these rates were to continue, these trends would be more than sufficient to achieve the Growth Plan forecast, or, Toronto would achieve the employment forecast well before 2041.

## Households and Units

Toronto's housing growth is also on track with the household forecasts supporting the Growth Plan 2017. The forecasts supporting the Provincial Growth Plan anticipate that the City needs to accommodate 399,270 households between 2001 and 2041.<sup>31</sup> The Canada Mortgage and Housing Corporation (CMHC) reported that 225,995 units were built from 2002 to 2017.<sup>32</sup> This is 57% of the units required to accommodate the forecasted growth.

The current Development Pipeline contains 2,407 development proposals received by the City representing 376,480 units (see Table 13). Of these, 143,858 units have received at least their first Planning approval but are not yet built. This represents a further 36% of the required units. Together, the units built from 2002 to 2017 and those units approved but not yet built total 369,853 units or 93% of the units required to accommodate the household growth to 2041 anticipated by the forecasts supporting the Growth Plan just 16 years into the forty-year forecast period (see Figure 6).

Not all development proposals are approved. However, if the proposals in the development Pipeline which are still under review are included, the total potential housing rises to 516,034 units or 129% of the forecasted household demand. This indicates that the City already has more than sufficient potential housing to accommodate the forecasted growth to 2041.

Some units are demolished to realize the new housing. A previous Development Charges Background Study used a demolition rate of 10% in realizing the new residential units.

Taking this into account, a net total of 203,396 units were completed with a further 129,472 net new units approved but not yet constructed, totalling 83% of the units needed to accommodate the forecasted household growth to 2041. Including the proposals in the development Pipeline still under review, the total net potential housing is 464,431 units; a surplus of 65,161 units or 16% above the forecasts supporting the Growth Plan.

Not all submitted proposals are approved, and not all approved projects are built. However, given these current trends, Toronto is well on its way to housing the population forecasted by the *Growth Plan* to 2041.

## Density of Jobs and People in Growth Areas

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*. If an Urban Growth Centre has already achieved a density higher than 400 people and jobs per hectare, then that density is considered to be that UGC's target.<sup>33</sup>

Toronto's Official Plan seeks to direct growth to the *Centres* and *Downtown*

**Table 13: Growth Plan Forecasts**

	Potential Supply	%	Potential Supply Less Estimated Demolitions	%
Hemson Forecast to 2041	399,270	100.0	399,270	100.0
Completions 2002 - 2017	225,995	56.6	203,396	50.9
Approved But Not Built 2013-2017	143,858	36.0	129,472	32.4
Under Review 2013-2017	146,181	36.6	131,563	33.0
<b>Total</b>	<b>516,034</b>	<b>129.2</b>	<b>464,431</b>	<b>116.3</b>
Additional Potential Housing	116,764	29.2	65,161	16.3

Source: City of Toronto, City Planning: Land Use Information System II, Hemson Consulting Ltd, Greater Golden Horseshoe Growth Forecasts to 2041, Technical Report, November 2012, CMHC. Development projects with activity between January 1, 2013 and December 31, 2017. 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.

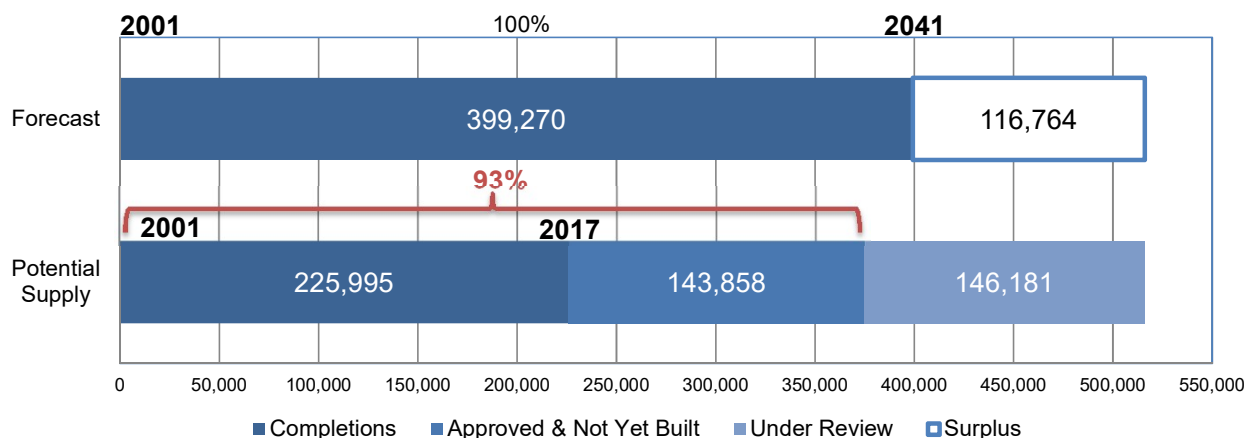
"in order to promote mixed use development to increase opportunities for living close to work and to encourage walking and cycling for local trips."<sup>34</sup> Toronto's overall growth and intensification is encouraging.

Table 14 on page 28 shows the density of people and jobs per hectare for *Downtown* and each *Centre* between 2006 and 2016, and for the city overall. Since 2006, each of these areas has become steadily more dense. *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*. These *Centres* have continued to become more dense. Table 14 also shows that *Downtown* and the *Centres* have intensified in comparison to the city overall, as the Growth Plan has directed.

If the density trends continue, it is likely that *Downtown* will exceed the UGC density target well before 2031. The 2016 density of the *Downtown* Toronto *Urban Growth Centre* area is 354 people and jobs per hectare. According to the Census, the population increased by 41,668 people between 2011 and 2016. According to the City's Toronto Employment

**Figure 6: Growth Plan Forecasts**



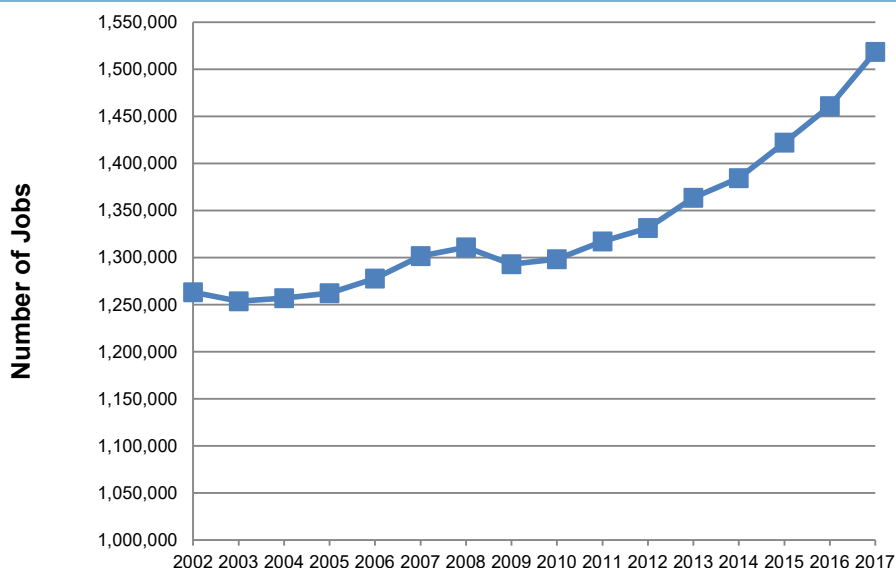
Source: City of Toronto, City Planning : Land Use Information System II.

Development projects with activity between January 1, 2013 and December 31, 2017. 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.

Survey, the employment increased by 69,280 jobs between 2011 and 2016 (see Figure 7).<sup>35</sup> The increase in density as a result of this growth is an additional 52 people and jobs per hectare over the 2011-2016 period. This demonstrates both the growth and growth in density of the UGC.

The 2016 Q4 Pipeline contained in the Downtown UGC area 42,556 units in projects that were built between 2012 and 2016, and a further 45,236 units in projects which are active and thus which have been approved, for which Building Permits have been applied for or have been issued, and/or those which are under construction but are not yet built.<sup>36</sup> The number of units in the area that are in active projects with at least one Planning approval is greater than the number of units which have been built over the past five years. If a similar number of units in active projects were realized in the next five years as were built in the previous five years with commensurate population and employment growth over the next five years from 2016 to 2021 as occurred over the previous five years from 2011 to 2016 i.e. an additional 110,948 people and jobs, the resulting

**Figure 7: City of Toronto Employment**



Source: Toronto City Planning Division, Toronto Employment Survey

density would be an additional 52 people and jobs per hectare for a total of 406 people and jobs per hectare. Thus if the current trends continued for another five years, the resulting density of the Downtown Toronto UGC would achieve the minimum *Urban Growth Centre* density target well before 2031.

The divergent rates of population and employment growth and density in *Downtown* and the *Centres* indicate the importance of continuing to promote employment and mixed-use development across the city and in these key areas of the city's urban structure.

**Table 14: Density of People and Jobs Per Hectare in Urban Growth Centres**

Measure	Density (People and Jobs Per Hectare)			Percent Change in Density
Year	2006	2011	2016	2006-2016
Scenario	Actual	Actual	Actual	Population Change
<b>City of Toronto</b>	<b>60</b>	<b>62</b>	<b>66</b>	<b>11%</b>
<b>Urban Growth Centres</b>				
<b>Downtown and Central Waterfront</b>	<b>265</b>	<b>302</b>	<b>354</b>	<b>34%</b>
<b>Centres</b>	<b>250</b>	<b>288</b>	<b>306</b>	<b>22%</b>
Etobicoke Centre	137	144	151	11%
North York Centre	385	455	480	25%
Scarborough Centre	138	156	172	25%
Yonge-Eglinton Centre	482	570	604	25%

Sources: City Planning, Land Use Information System II. City of Toronto, City Planning, Toronto Employment Surveys 2006, 2011, 2016. Statistics Canada, 2006 and 2011 Censuses. Custom tabulation. 2006, 2011 and 2016 numbers were calculated based on actual employment values from the Toronto Employment Survey and actual population values from the Census. \*Some 12,500 of the new jobs counted within Scarborough and North York Centres (6,250 jobs each) in the 2016 Toronto Employment Survey can be attributed to the inclusion of Toronto District School Board (TDSB) employees; TDSB footloose employment captured in the 2016 Toronto Employment Survey is not included here in the density calculations for 2016.

## How the Data is Collected

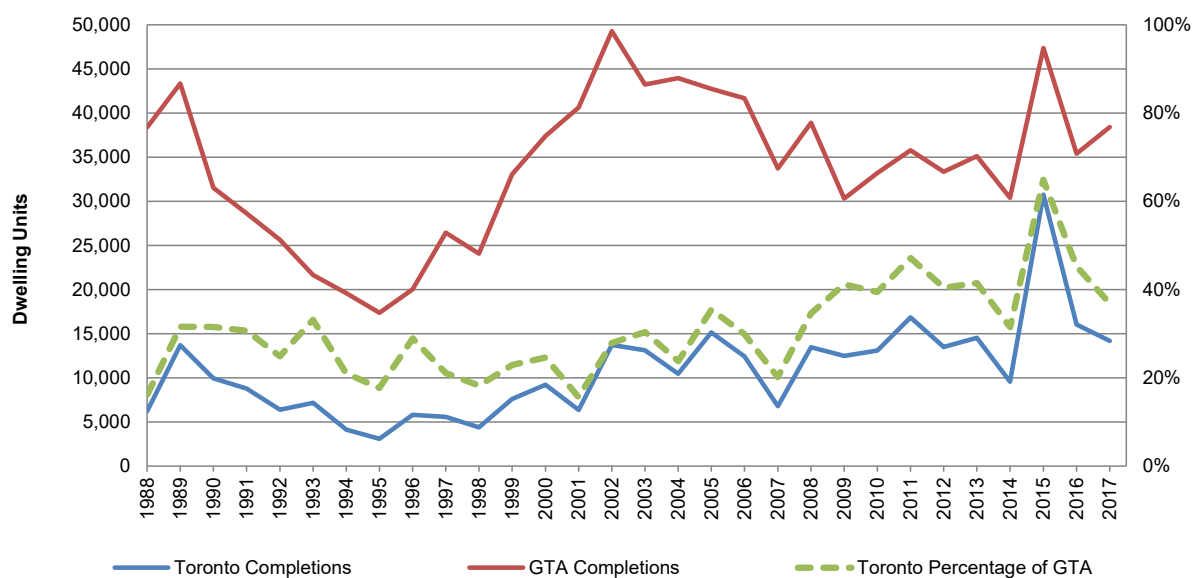
The development information presented in this bulletin was extracted from Land Use Information System II, maintained by the City's Research and Information unit, Strategic Initiatives, Policy & Analysis section of the City Planning Division. Staff collect detailed information from every development application received by the Division, as well as any revisions to the applications made throughout the planning process. Information is also collected from building permit applications. The result is a rich body of data describing the location, size and built form of development projects across the City of Toronto throughout each stage of development.

## Endnotes

- 1 For the purposes of this bulletin, any reference to *Downtown* includes the *Central Waterfront Area*.
- 2 The Official Plan states “*Employment Areas* are places of business and economic activities vital to Toronto’s economy and future economic prospects.” The policies for *Employment Areas* were recently replaced by new policies as part of the Municipal Comprehensive Review of employment lands. These new policies are currently under appeal at the Ontario Municipal Board (OMB). For more information on the status of the appeals and to access interim Board Orders, please visit the OMB’s website: <https://www.omb.gov.on.ca/ecs/CaseDetail.aspx?n=PL140860>.
- 3 There were 42,648 residential units and 1.3 million m2 of non-residential GFA proposed in projects submitted to City Planning in 2017. The annualized average number of units proposed between 2012 and 2016 was 40,478. The number of units proposed in 2017 represents 105% of the annualized average of units proposed over the previous five year period, indicating an increase in project size on average.
- 4 City of Toronto, City Planning, Official Plan, Downtown Plan Secondary Plan, Policy 2, 2018. <http://app.toronto.ca/tmmis/viewAgendaItemHistory.do?item=2018.PG29.4>.
- 5 City of Toronto, City Planning, Official Plan, King-Spadina Secondary Plan, Policy 2, 2006.
- 6 City of Toronto, City Planning, Official Plan, Railway Lands East Secondary Plan, Policy 2, 2006.
- 7 City of Toronto, City Planning, Midtown in Focus: Proposed Yonge-Eglinton Secondary Plan Update, November 2, 2017. <https://www.toronto.ca/legdocs/mmis/2017/pg/bgrd/backgroundfile-108435.pdf>.
- 8 City of Toronto, City Planning, Official Plan, Garrison Common North Secondary Plan, Policy 2.1(c), 2006.
- 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, <http://www1.toronto.ca/City%20Of%20Toronto/City%20Planning/SIPA/Files/pdf/O/OPA%20231%20sections%20appealed-December%2020%202016.pdf>.
- 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 <http://www.toronto.ca/opreview>.
- 12 Kneebone, Elizabeth (2013) *Job Sprawl Stalls: The Great Recession and Metropolitan Employment Location*, Brookings Institution.
- 13 City of Toronto, City Planning, *Toronto Employment Survey*, 2016.
- 14 City of Toronto, City Planning, *Profile Toronto: Toronto Employment Survey*, 2017.
- 15 City of Toronto, City Planning, *Profile Toronto: Toronto Employment Survey*, 2017.
- 16 The Official Plan was adopted before the Growth Plan came into force. By provincial legislation, the Official Plan must be brought into conformity with the policies of the Growth Plan. The City is working to bring the Official Plan into conformity with the Growth Plan through a series of Official Plan Amendments. Toronto’s Official Plan contemplates the city having 3.19 million people and 1.66 million jobs by 2031. The 2006 Growth Plan forecasts 3.08 million people and 1.64 million jobs in the city of Toronto by 2031. The amended Growth Plan, including revised forecasts, came into effect in June 2013. Official Plan Amendment (OPA) 231 amended this forecast and this policy is in effect. See: <http://www1.toronto.ca/City%20Of%20Toronto/City%20Planning/SIPA/Files/pdf/O/OPA%20231%20sections%20appealed-December%2020%202016.pdf>.
- 17 City of Toronto, By-Law No. 1714-2013. Updated to Board order issued December 20, 2016. See: <http://www1.toronto.ca/City%20Of%20Toronto/City%20Planning/SIPA/Files/pdf/O/OPA%20231%20sections%20appealed-December%2020%202016.pdf>. Uses in *Core Employment Areas* that are under appeal include industrial trade schools, media, and information and technology facilities.
- 18 City of Toronto, By-Law No. 1714-2013. Updated to Board order issued December 20, 2016. See: <http://www1.toronto.ca/City%20Of%20Toronto/City%20Planning/SIPA/Files/pdf/O/OPA%20231%20sections%20appealed-December%2020%202016.pdf>. The permission for all types of retail uses in *General Employment Areas* is under appeal.
- 19 CBRE Marketview, Toronto Office, Q4 2017.
- 20 CBRE Marketview, Toronto Office, Q4 2017; CBRE Marketview, Canada Office, Q4 2017.
- 21 CBRE Marketview, Toronto Office, Q4 2017.
- 22 CBRE Marketview, Toronto Office, Q4 2017.
- 23 CBRE Marketview, Toronto

- 24 'Downtown' as defined by CBRE in CBRE Marketview, Toronto Office, Q42017 does not correlate to the geography of the *Downtown and Central Waterfront* as defined by the City of Toronto's Official Plan.
- 25 CBRE Marketview, Toronto Office, Q4 2017.
- 26 CBRE Marketview, Toronto Office, Q4 2017.
- 27 CBRE Marketview, Toronto Office, Q4 2017.
- 28 CBRE Marketview, Toronto Office, Q4 2017.
- 29 The Official Plan was adopted before the Growth Plan came into force. By provincial legislation, the Official Plan must be brought into conformity with the policies of the Growth Plan. The City is working to bring the Official Plan into conformity with the Growth Plan through a series of Official Plan Amendments. Toronto's Official Plan contemplates the city having 3.19 million people and 1.66 million jobs by 2031. The 2006 Growth Plan forecasts 3.08 million people and 1.64 million jobs in the city of Toronto by 2031. The amended Growth Plan, including revised forecasts, came into effect in June 2013. Official Plan Amendment (OPA) 231 amended this forecast and this policy is in effect. See: <http://www1.toronto.ca/City%20Of%20Toronto/City%20Planning/SIPA/Files/pdf/O/OPA%20231%20sections%20appealed-December%2020%202016.pdf>.
- 30 Statistics Canada, Annual Demographic Estimates, 91-214-X.
- 31 Hemson Consulting Ltd, *Greater Golden Horseshoe Growth Forecasts to 2041*, Technical Report, 2012.
- 32 Canada Mortgage and Housing Corporation, *Housing Now* –
- 33 Ontario Ministry of Infrastructure, *Growth Plan for the Greater Golden Horseshoe, 2006: Office Consolidation, June 2013*, Policy 2.2.4.5 and 2.2.4.6.
- 34 City of Toronto, City Planning, Official Plan, p. 2-5, Policy 2d, 2006.
- 35 City of Toronto, Toronto Employment Survey Bulletin, 2016.
- 36 Profile Toronto: *How Does the City Grow?* April 2017, Table 4, page 7 presented to Planning and Growth Management Committee on May 31, 2017. See: <https://www.toronto.ca/legdocs/mmis/2017/pg/bgrd/backgroundfile-103953.pdf> and <http://app.toronto.ca/tmmis/viewAgendaItemHistory.do?item=2017.PG21.2>.

## Appendix: Toronto & GTA Dwelling Unit Completions



Source: Canada Mortgage and Housing Corporation, *Housing Now - Ontario Reports*

## Appendix: Toronto & GTA Dwelling Unit Completions

### Freeholds

	Completions	Absorptions	Net Completions	"Unabsorbed" Percentage
2013	1,735	1,649	86	5.2
2014	1,583	1,525	58	3.8
2015	1,374	1,342	32	2.4
2016	1,513	1,464	49	3.3
2017	1,849	1,813	36	2.0
<b>Total</b>	<b>6,205</b>	<b>5,980</b>	<b>225</b>	<b>3.8</b>

### Condominiums

	Completions	Absorptions	Net Completions	"Unabsorbed" Percentage
2013	11,126	10,950	176	1.6
2014	7,777	7,900	-123	-1.6
2015	28,013	27,082	931	3.4
2016	13,426	14,137	-711	-5.0
2017	11,507	12,257	-750	-6.1
<b>Total</b>	<b>71,849</b>	<b>72,326</b>	<b>-477</b>	<b>-0.7</b>

### Rental

	Completions	Absorptions	Net Completions	"Unabsorbed" Percentage
2013	1,681	1,269	412	32.5
2014	191	195	-4	-2.1
2015	1,362	1,027	335	32.6
2016	1,088	1,028	60	5.8
2017	815	595	220	37.0
<b>Total</b>	<b>5,137</b>	<b>4,114</b>	<b>1,023</b>	<b>24.9</b>

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 2018 year-to-date data has been excluded.

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

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Please direct information inquiries and publication orders to:

City Planning Division  
Strategic Initiatives, Policy & Analysis  
Research and Information  
Metro Hall, 22nd Floor  
Toronto, Ontario M5V 3C6

tel: 416-392-9422  
fax: 416-392-3821  
TTY: 416-392-8764  
e-mail: [cityplanning@toronto.ca](mailto:cityplanning@toronto.ca)