

## Development Pipeline 2023

### Survey Highlights

Total Proposed Projects

**2,344**

Proposed Residential Units

**800,889**

Proposed Purpose-Built Rental Units

**120,301**

Proposed Residential Units in Mall Redevelopment Projects

**74,745**

Proposed Residential Units in Transit Oriented Communities

**27,700**

Proposed Non-Residential Gross Floor Area

**13,958,670 m<sup>2</sup>**

Average Number of Units in OPA and ZBLA Approvals Per Year

**38,428**

Average Number of Units in SPA Approvals Per Year

**21,534**

Average Number of Units Built Per Year

**17,576**

### Introduction

Toronto, the most populous city in Canada and the economic focal point of southern Ontario, has experienced significant residential and non-residential development in recent decades. The Development Pipeline Bulletin describes the characteristics of Toronto's urban growth and change using a combination of statistical, geospatial and historical analysis. The examination of under review and active development projects provides insights on the city's future growth.

Toronto's Official Plan is the guide for development of the city over the next 30 years. It is regularly updated to reflect Toronto's changing urban context and to conform with the Provincial Growth Plan for the Greater Golden Horseshoe and the Provincial Policy Statement. The Official Plan's Urban Structure Map, included in this bulletin as Map 1 on page 3, identifies key geographies for accommodating housing and population growth, including the Downtown and Central Waterfront, and the Centres. Job intensification is prioritized in Employment Areas. Residential and non-residential development is also directed to designated Mixed Use Areas, Secondary Plan areas and major redevelopment opportunities across the city. Many of these geographies have the capacity to accommodate future growth being serviced by existing or planned infrastructure,

transit and community services and facilities.

This bulletin illustrates how the city has developed and how it will continue to grow over time. It reports on development occurring within growth management areas, as well as at a city-wide level, for the purpose of monitoring the implementation of the Official Plan. Through maps, tables, and analysis, this bulletin highlights emerging trends in the scale, location, and characteristics of developments. In addition, the bulletin reports on Toronto's progress towards achieving long-range provincial growth targets and forecasts. Special topics include the Growth Plan forecasts, development within Transit Oriented Communities (TOCs), and trends in mall redevelopment.

### What is the Development Pipeline?

The City of Toronto's Development Pipeline (2023 Q4 Pipeline) consists of all development projects with activity in the five-year window between January 1, 2019 and December 31, 2023. A multi-year analysis period enables a more representative understanding of development activity in Toronto as applications move through the various approval, permitting, and construction stages to final completion. The Pipeline reports on newly proposed space and takes

account of retained buildings and residential units.

The Pipeline Bulletin consistently uses the terms ‘development project’ and ‘development activity’:

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

As-of-right construction is not captured by the Development Pipeline. This includes development proposals below the Site Plan Control threshold (of ten residential units).<sup>1</sup> As such, this bulletin does not report on laneway suites, garden suites or multiplexes. The emergence of these housing types, as well as other “missing middle” housing forms, will be discussed in a forthcoming bulletin focused on housing intensification initiatives of the Expanding Housing Options in Neighbourhoods (EHON) program.

Projects are categorized into three general statuses, based on the stage of the development approvals and construction activity reached between January 1, 2019

and December 31, 2023. To provide greater clarity on these development process steps, this edition of the Development Pipeline Bulletin introduces a more detailed breakdown of the three Pipeline status categories.

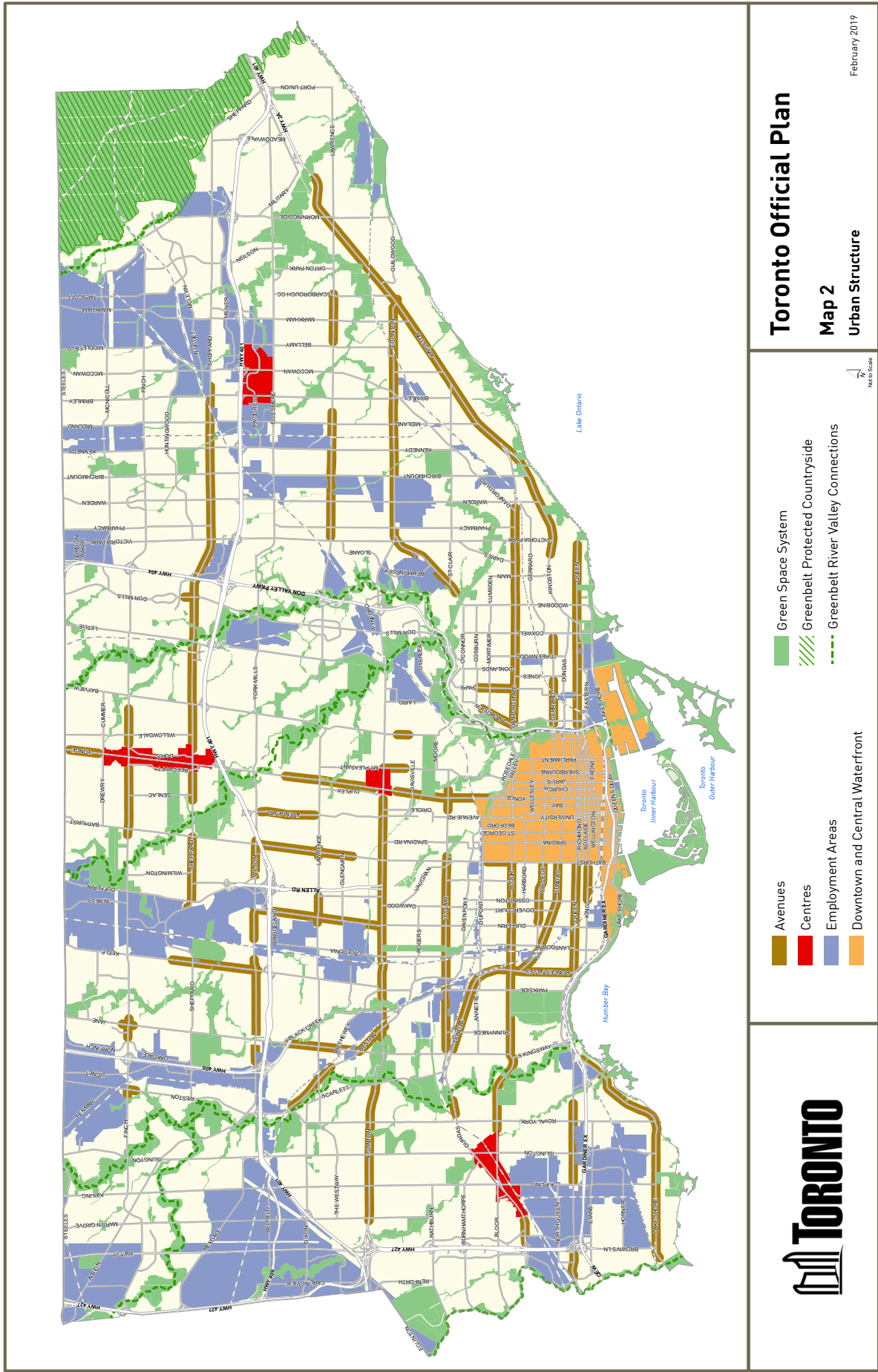
Complex projects are split into phases, enabling different parts of a development to be monitored independently as they progress. These phases typically align with Site Plan Control applications, focusing on proposed building locations and site-specific details.

Project Status and Stages

| Status       | Stage                                     | Description   |
|--------------|---|---|
| Under Review | Planning Application Submitted            | Projects that have not yet been approved or refused or are under appeal.  |
|              | Approved                                  | Projects with at least one Planning approval, including projects that have received all necessary Planning approvals but have not yet applied for Building Permits. |
| Active       | Permit Application                        | Projects with at least one Planning approval that have applied for but have not yet been issued a Building Permit application.                                      |
|              | Work Started                              | Projects that have been issued building permits and are assumed to be under construction but are not yet built  |
| Built        | Ready for Occupancy and/or Work Completed | Projects that became ready for occupancy and/or were completed during the period.   |

Note: Approved projects include Delegated, Council and Ontario Land Tribunal (OLT) approvals. Delegated approval refers to Site Plan or Plan of Condominium approvals granted by the Chief Planner. Council approval is required for Official Plan Amendment and Rezoning applications. All application types may be appealed and granted approval by the OLT. If an Official Plan Amendment or Rezoning is necessary for a proposed development, that approval is required to come prior to a Delegated approval on a Site Plan Control application.

Map 1: Official Plan Urban Structure Map



## City-wide Development Overview

### The Development Pipeline January 1, 2019 – December 31, 2023

The five-year 2023 Q4 Development Pipeline is comprised of 2,344 development projects (see Table 1). Cumulatively, these projects propose a record 800,889 residential units and 13,958,670 m<sup>2</sup> of non-residential gross floor area (GFA).

Between the 2021 Pipeline<sup>2</sup> and the 2023 Pipeline the absolute number of projects in the Pipeline increased by 63. New projects were proposed in all areas of the city, however the net number of projects increased exclusively within growth management areas of the Official Plan, including 44 projects along the Avenues and 16 projects within the Downtown and Central Waterfront. The net increase of projects

occurring exclusively within growth management areas demonstrates the success of the City's policies in attracting and encouraging development in these areas.

Projects have become larger and more complex, as is evident when comparing the number of projects and proposed residential units between Under Review and Active projects. While there are fewer Under Review projects than there are Active projects, there are considerably more residential units in Under Review projects than there are in Active projects. Figure 1 also shows that the number of projects submitted annually between 2005 and 2023 has remained relatively steady,

while the number of residential units proposed and the overall GFA of projects increased substantially in recent years. Larger, more complex projects require longer review and construction processes.

The volume of development proposals has historically been influenced by legislative and policy changes, as well as market conditions. Notably, a surge in applications in 2021 was partially triggered by the anticipated implementation of Inclusionary Zoning in 2022 (see Figure 2 on page 6).

**Table 1: Summary of Development Activity in the City of Toronto by Pipeline Status and Stage**

|                                    | Development Projects |               | Total Proposed Residential Units |               | Total Proposed Non-Residential GFA (m <sup>2</sup> ) |               |
|------------------------------------|----------------------|---------------|----------------------------------|---------------|--|---------------|
| <b>Under Review</b>                | 850                  | 36.3%         | 436,421                          | 54.5%         | 5,153,723  | 36.9%         |
| <b>Active</b>                      | 908                  | 38.7%         | 258,397                          | 32.3%         | 5,834,093  | 41.8%         |
| <b>Approved</b>                    | 451                  | 19.2%         | 144,351                          | 18.0%         | 3,627,682  | 26.0%         |
| <b>Building Permit Applied For</b> | 131                  | 5.6%          | 42,852                           | 5.4%          | 515,070  | 3.7%          |
| <b>Under Construction</b>          | 326                  | 13.9%         | 71,194                           | 8.9%          | 1,691,341  | 12.1%         |
| <b>Built</b>                       | 586                  | 25.0%         | 106,071                          | 13.2%         | 2,970,854  | 21.3%         |
| <b>TOTAL</b>                       | <b>2,344</b>         | <b>100.0%</b> | <b>800,889</b>                   | <b>100.0%</b> | <b>13,958,670</b>                                    | <b>100.0%</b> |

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

Development projects with activity between January 1, 2019 and December 31, 2023. 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 2023, the intake of projects, as measured by residential units and GFA, has returned to the pre-pandemic average. The decrease in projects received in 2023 is in part a result of a cooling market triggered by large increases in interest rates as the Bank of Canada responded to heightened inflation.

The following sections will examine residential and non-residential development trends across the city.

Figure 2 also shows a seasonal pattern in the submission of new development projects. With the exception of 2023, each year starts with a limited volume of submissions that increases as the year progresses, with spikes in the summer and in the final months.

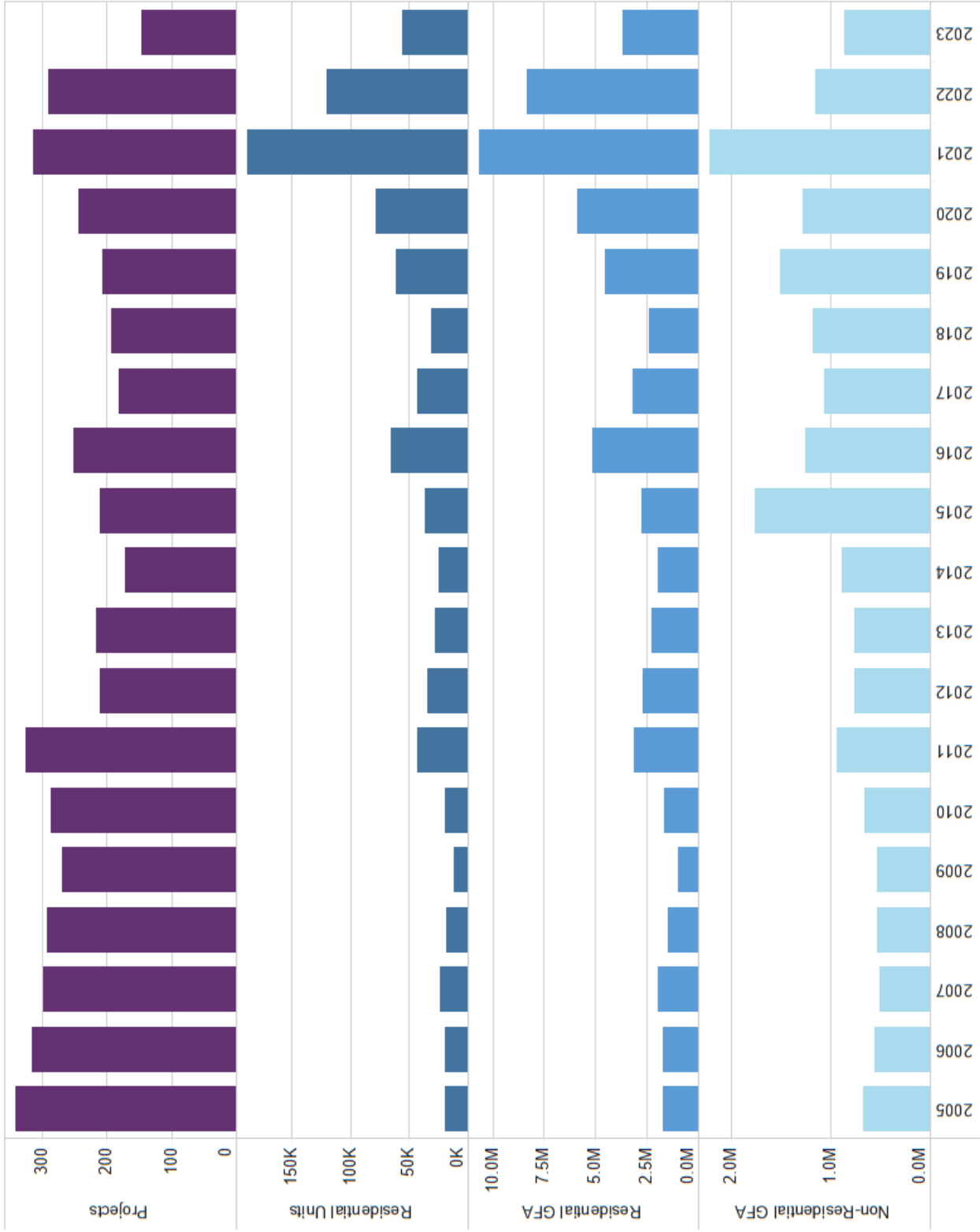
**Table 2: Proposed Projects in the City of Toronto by Status**

|  | Under Review | Active       |                                |                    |              | Built      | Total in Pipeline | % of Total    | % of Growth Areas |
|--|--------------|--------------|--------------------------------|--------------------|--------------|------------|-------------------|---------------|-------------------|
|  |              | Total Active | Delegated/<br>Council Approval | Permit Application | Work Started |            |                   |               |                   |
| <b>City of Toronto</b>                 | <b>850</b>   | <b>908</b>   | <b>451</b>                     | <b>131</b>         | <b>326</b>   | <b>586</b> | <b>2,344</b>      | <b>100.0%</b> |                   |
| <b>Growth Areas</b>                    | <b>571</b>   | <b>592</b>   | <b>312</b>                     | <b>100</b>         | <b>180</b>   | <b>376</b> | <b>1,539</b>      | <b>65.7%</b>  | <b>100.0%</b>     |
| <b>Downtown and Central Waterfront</b> | 150          | 219          | 113                            | 34                 | 72           | 149        | <b>518</b>        | 22.1%         | 33.7%             |
| <b>Centres</b>                         | 43           | 57           | 28                             | 12                 | 17           | 24         | <b>124</b>        | 5.3%          | 8.1%              |
| <b>Avenues</b>                         | 271          | 227          | 130                            | 36                 | 61           | 142        | <b>640</b>        | 27.3%         | 41.6%             |
| <b>Other Mixed Use Areas</b>           | 107          | 89           | 41                             | 18                 | 30           | 61         | <b>257</b>        | 11.0%         | 16.7%             |
| <b>All Other Areas</b>                 | 279          | 316          | 139                            | 31                 | 146          | 210        | <b>805</b>        | 34.3%         |                   |

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

Development projects with activity between January 1, 2019 and December 31, 2023. 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.

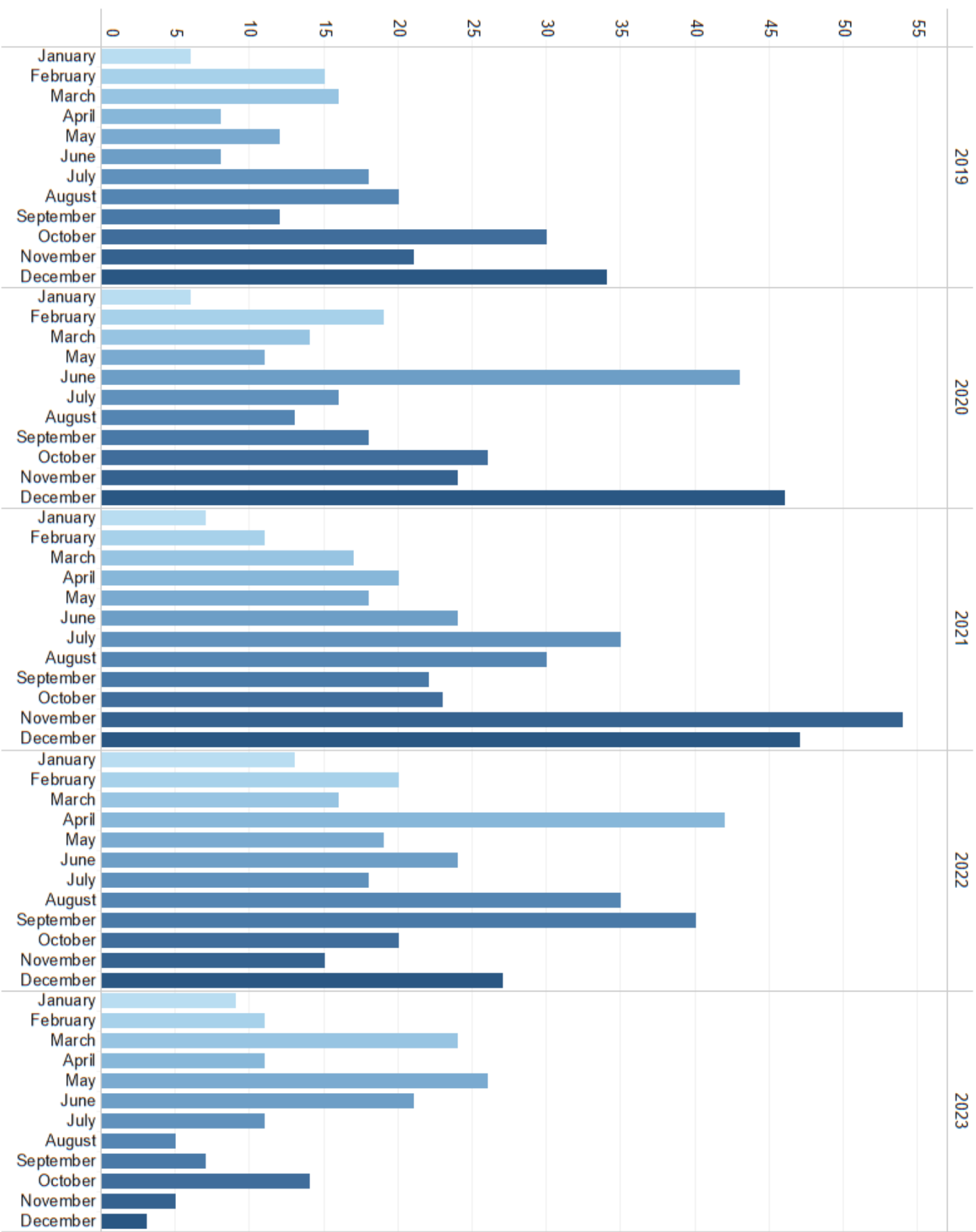
Figure 1: Proposed Projects, Residential Units, and GFA by Application Intake Year, 2005-2023



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

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

**Figure 2: Number of Proposed Projects Submitted by Month**



## Residential Development

The 2023 Pipeline contains 800,889 residential units, the highest ever recorded. This is 129,928 more units than the five-year window to 2021,<sup>3</sup> representing growth of 19% in the near-term housing supply. Over the past five years, 106,071 units have been built as a result of Planning approvals and downstream Building Permits, an average of 21,214 units per year. In addition, there is as-of-right construction not captured by the Pipeline. See Table 3 and in Maps 2 and 3 on Pages 9 and 10.

Most of the residential units in the 2023 Pipeline are Under Review (54%) or Active (32%), with the remainder built during the five-year period. The 258,397 units in Active projects represent 90% of units required to achieve the Municipal Housing Target by 2031. Of the residential units within Active projects, 56% (144,351 units) have received at least one Planning approval but have not yet applied for a Building Permit, 17% (42,852 units) have applied for, but not yet been issued, a Building Permit, and 28% (71,194 units) are currently under construction but have not yet been completed.

Over the past three years, proposed residential units have become increasingly distributed across the city, with the largest increase in areas outside of the growth management areas (28%). While the number of projects proposed outside of the City's growth management areas has remained stable since the 2021 Pipeline, both the number of proposed residential units and the amount of proposed non-residential space has increased.

There are 12,770 built units, 38,316 active units, and 116,424 units under review in All Other Areas. Units under review represent 70% of proposed residential units in All Other Areas, compared to 51% of residential units in Growth Areas. Since the 2020 Pipeline, the number of residential units proposed outside of growth management areas has nearly tripled from 69,276 units, representing an increase of 142% compared to growth of 46% in the growth management areas. About half of this increase is due to the proposed redevelopment of the Downsview Airport lands, which accounts for just over one-quarter of all residential units proposed in All

Other Areas. Nevertheless, excluding Downsview, the number of residential units proposed outside of growth management areas has increased by over three-quarters.

Altogether, this indicates that the scale of projects and amount of residential development occurring outside designated Growth Areas is increasing, and that there is a dispersion of growth from the city centre to the other parts of the city, including Downsview, other Secondary Plan Areas, and areas designated as either Apartment Neighbourhoods or Neighbourhoods. The increasing development activity outside of the growth management areas, as well as new permissions recently brought forward through the City's Expanding Housing Options in Neighbourhoods program (details of which are discussed further in this bulletin), indicate that there will be more change happening in these areas going forward.

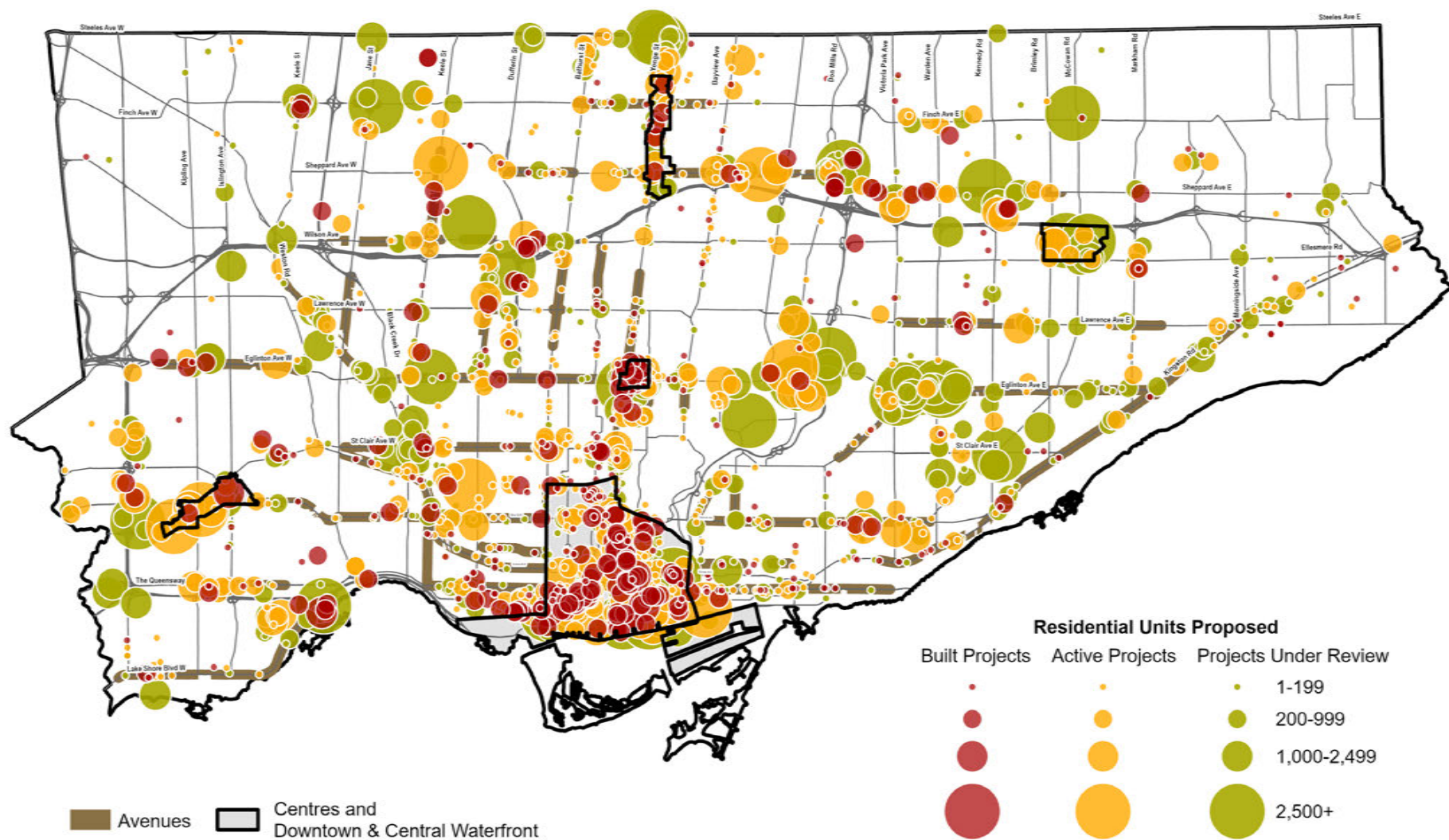
**Table 3: Proposed Residential Units in the City of Toronto by Status**

|  | Under Review   | Active         |                                |                    |               | Built          | Total in Pipeline | % of Total    | % of Growth Areas |
|--|----------------|----------------|--------------------------------|--------------------|---------------|----------------|-------------------|---------------|-------------------|
|  |                | Total Active   | Delegated/<br>Council Approval | Permit Application | Work Started  |                |                   |               |                   |
| <b>City of Toronto</b>                 | <b>436,421</b> | <b>258,397</b> | <b>144,351</b>                 | <b>42,852</b>      | <b>71,194</b> | <b>106,071</b> | <b>800,889</b>    | <b>100.0%</b> |                   |
| <b>Growth Areas</b>                    | <b>319,997</b> | <b>220,081</b> | <b>116,611</b>                 | <b>38,500</b>      | <b>64,970</b> | <b>93,301</b>  | <b>633,379</b>    | <b>79.1%</b>  | <b>100.0%</b>     |
| <b>Downtown and Central Waterfront</b> | 65,372         | 79,095         | 40,062                         | 11,547             | 27,486        | 45,415         | <b>189,882</b>    | 23.7%         | 30.0%             |
| <b>Centres</b>                         | 44,283         | 33,861         | 19,488                         | 8,321              | 6,052         | 10,829         | <b>88,973</b>     | 11.1%         | 14.0%             |
| <b>Avenues</b>                         | 108,826        | 57,206         | 33,757                         | 10,238             | 13,211        | 22,607         | <b>188,639</b>    | 23.6%         | 29.8%             |
| <b>Other Mixed Use Areas</b>           | 101,516        | 49,919         | 23,304                         | 8,394              | 18,221        | 14,450         | <b>165,885</b>    | 20.7%         | 26.2%             |
| <b>All Other Areas</b>                 | 116,424        | 38,316         | 27,740                         | 4,352              | 6,224         | 12,770         | <b>167,510</b>    | 20.9%         |                   |

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

Development projects with activity between January 1, 2019 and December 31, 2023. Built projects are those which became ready for occupancy and/or were completed. Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or those which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal.

## Map 2: Proposed Residential Development



Source: Land Use Information System II

Development projects with activity between January 1, 2019 and December 31, 2023. Built projects are those which became ready for occupancy and/or were completed. Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal.

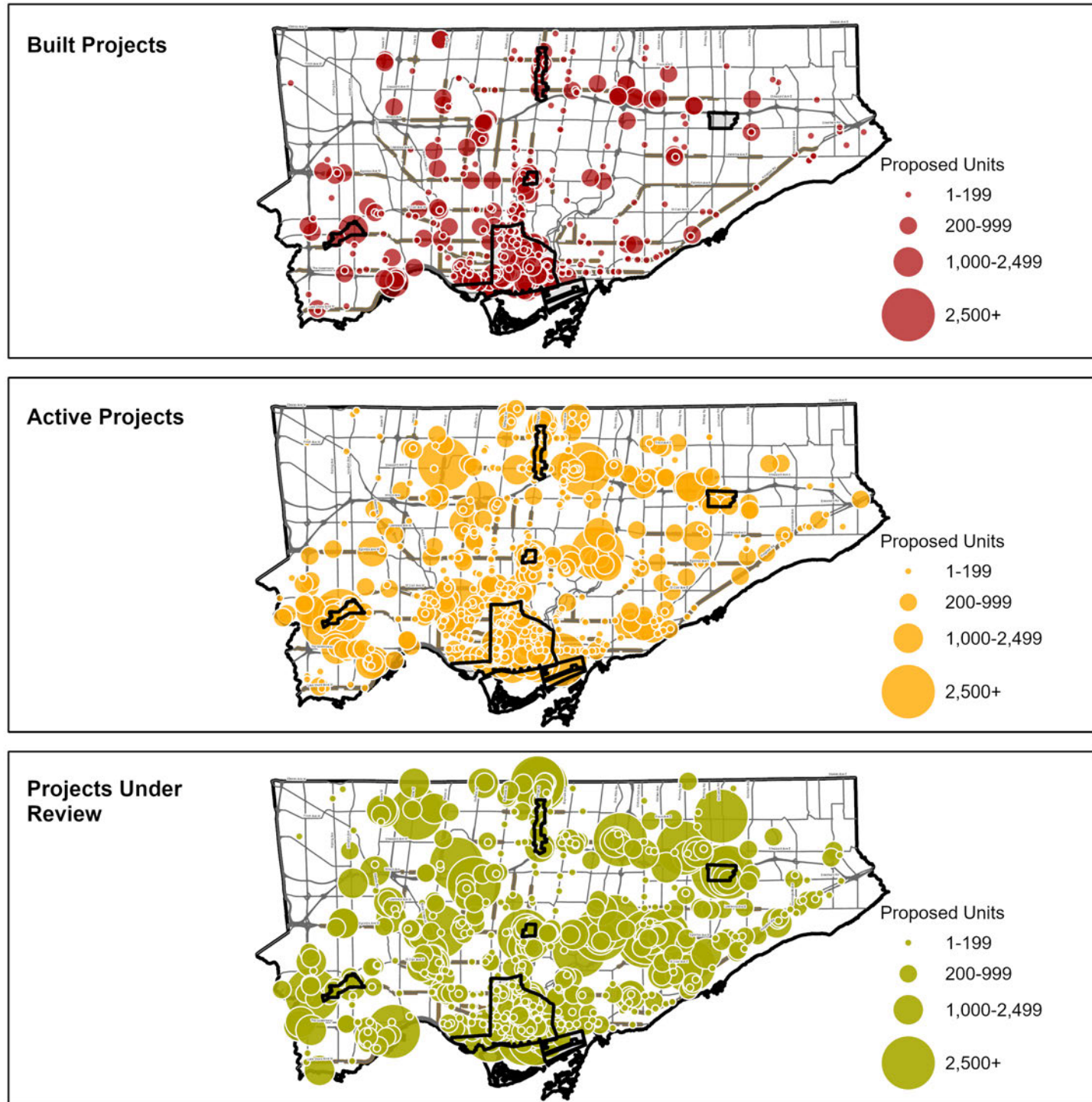
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### Map 3: Residential Development by Status



Source: Land Use Information System II

Development projects with activity between January 1, 2019 and December 31, 2024. Built projects are those which became ready for occupancy and/or were completed. Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal.

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Avenues   
Centres and Downtown & Central Waterfront 

Residential projects in growth management areas of the Official Plan are almost twice as large on average than those in the rest of the city (see Table 4). An average of 412 residential units are proposed per project located in a growth management area compared to 208 per project located outside of a growth management area, with the Centres (718 units per project) and Other Mixed Use Areas (645 units per project) containing the greatest number of residential units per project, on average.

Average project sizes have increased throughout the city, ranging from an additional 23 residential units per project on average in the Downtown and Central Waterfront to 80 additional units in other Mixed Use Areas compared to the 2022 Q2 Development Pipeline. This indicates a dispersal of larger projects and an increase in overall project size to more areas of the city.

The relative size of Built, Active, and Under Review projects illustrates how the average size of development has grown in recent years. Active residential projects are 57% larger than those recently built, while projects Under Review are almost triple the size of those recently completed.

Table 4: Average Number of Residential Units Per Project by Status

|                                 | Under Review | Active | Built | Total in Pipeline |
|---------------------------------|--------------|--------|-------|-------------------|
| City of Toronto                 | 513          | 285    | 181   | 342               |
| Growth Areas                    | 560          | 372    | 248   | 412               |
| Downtown and Central Waterfront | 436          | 361    | 305   | 367               |
| Centres                         | 1,030        | 594    | 451   | 718               |
| Avenues                         | 402          | 252    | 159   | 295               |
| Other Mixed Use Areas           | 949          | 561    | 237   | 645               |
| All Other Areas                 | 417          | 121    | 61    | 208               |

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

Development projects with activity between January 1, 2019 and December 31, 2023. 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.

The Development Pipeline tracks and reports on project elements that are newly proposed and existing elements that will be retained. As much of Toronto is already built out, many sites contain existing units which must be either demolished prior to redevelopment or retained and incorporated within the development.

Of the 800,889 residential units proposed in the Pipeline, an estimated 71,279 existing units will be demolished, while 40,370 units are proposed to be retained on site for a total of 841,259 units. To calculate new housing supply potential, the estimated number of demolished units are subtracted from the 800,889 proposed new units for a net increase of 729,610 units in the city (see Table 5).

The assumed demolition rate of 8.9% used for these estimates is based on an analysis of Demolition Permits issued by the Toronto Building Division, and Housing Completions reported by Canada Mortgage and Housing Corporation (CMHC), between 2005 and 2020.

**Table 5: Proposed, Retained and Total Residential Units and GFA**

|                        | Retained         | Proposed          | Total             | % of Total that<br>are Newly<br>Proposed | Estimated<br>Demolition | Net New Units<br>or GFA |
|------------------------|------------------|-------------------|-------------------|--|-------------------------|-------------------------|
| <b>City of Toronto</b> | <b>40,370</b>    | <b>800,889</b>    | <b>841,259</b>    | <b>95.2%</b>                             | <b>71,279</b>           | <b>729,610</b>          |
| Under Review           | 13,778           | 436,421           | 450,199           | 96.9%                                    | 38,841                  | 397,580                 |
| Active                 | 19,522           | 258,397           | 277,919           | 93.0%                                    | 22,997                  | 235,400                 |
| Built                  | 7,070            | 106,071           | 113,141           | 93.8%                                    | 9,440                   | 96,631                  |
| <b>City of Toronto</b> | <b>3,566,523</b> | <b>55,101,844</b> | <b>58,668,367</b> | <b>93.9%</b>                             | <b>4,904,064</b>        | <b>50,197,780</b>       |
| Under Review           | 1,207,156        | 27,933,123        | 29,140,279        | 95.9%                                    | 2,486,048               | 25,447,075              |
| Active                 | 1,796,651        | 18,914,474        | 20,711,125        | 91.3%                                    | 1,683,388               | 17,231,086              |
| Built                  | 562,716          | 8,254,247         | 8,816,963         | 93.6%                                    | 734,628                 | 7,519,619               |

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

Proposed, retained and total residential units, residential GFA and non-residential GFA in development projects with activity between January 1, 2019 and December 31, 2023. Built projects are those which became ready for occupancy and/or were completed. Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or those which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal. Gross floor area values are expressed in square metres. Citywide demolition rate is based on Demolition Permits issued 2005-2020 versus CMHC Completions over the same period.

## Approved and Built Units by Year

As the average size of development projects increases, so does the magnitude of development approved by Toronto City Council. Over the five years from 2019 to 2023, Council has consistently approved more residential units than were built (see Table 6).

City Council has approved more than twice the number of residential units than were built over the past five years. An average of 38,428 residential units were approved per year between 2019 and 2023 pertaining only to Official Plan Amendment and Zoning By-law Amendment applications. Over the same period, an average of 17,576 units were built. Projects typically apply for Building Permits once they have received a final Planning approval in the form of a Notice of

Approval Conditions (NOAC) or Statement of Approval for a Site Plan Control application. Considering only projects that have received a final Planning approval, the City approved an average of 21,534 residential units per year between 2019 and 2023. This is a surplus of 3,958 units on average versus the units built or a total of 123% of the average annual production through the Pipeline.

For development projects with activity between 2019 and 2023, less than half of the number of units that have received a first Planning approval on an Official Plan Amendment and/or Zoning By-law Amendment application have been built, and about four-fifths of the number of units which have received final Planning approval on a Site Plan Control application have been built.

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

**Table 6: Residential Units Approved and Built by Year, 2019-2023**

| Year                       | Units Approved<br>(Official Plan Amendment or<br>Rezoning Approval) | Units Approved<br>(Approval on Site Plan<br>Control Application) | Units Built   |
|----------------------------|---|--|---------------|
| 2019                       | 28,641  | 23,979   | 16,218        |
| 2020                       | 23,719  | 22,865   | 17,925        |
| 2021                       | 29,834  | 17,312   | 16,394        |
| 2022                       | 68,324  | 18,543   | 15,933        |
| 2023                       | 41,623  | 24,969   | 21,410        |
| <b>Total</b>               | <b>192,141</b>  | <b>107,668</b>   | <b>87,880</b> |
| 5 Year Average (2019-2023) | 38,428  | 21,534   | 17,576        |

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

Proposed residential units in development projects with activity between January 1, 2019 and December 31, 2023. Units approved (first approval) are units in projects that received their first planning approval in the year listed as a Rezoning or Official Plan Amendment application. Units approved (final approval) are units in projects that received Notice of Approval Conditions (NOAC) or Statement of Approval for a Site Plan for a Site Plan Control application in the year listed. Units built are units in projects that became ready for occupancy and/or were completed in the year listed.

Note: the number of units built in Table 3 may differ from the number of units in built projects listed in Table 6, as some projects became ready for occupancy before 2019 but had other development activity (such as an application for a Draft Plan of Condominium) during the pipeline window of January 1, 2019 to December 31, 2023. These figures are different than those in Table 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.

The City of Toronto has contributed an increasing share of new housing stock in the Greater Toronto Area (GTA), as shown in Table 7. CMHC reported that between 1994 and 1998 just 21% of the dwelling completions in the GTA occurred within the City of Toronto. Between 2019 and 2023, Toronto's share of GTA dwelling completions more than doubled to 49%. This growth occurred through intensification that is increasingly oriented towards high-rise built forms and infill housing. On average between 2019 and 2023, 9% of the units built per year were ground-related, made up of 1,041 single detached houses (6%), 96 semi-detached houses (1%), and 395 row or townhouses (2%) per annum. In contrast, 91% or 15,997 units were apartments and other dwelling types (see Table A.2 in the Appendix on page 54).

**Table 7: Dwelling Completions, Greater Toronto Area**

| Year                                  | Toronto Annual Average | Toronto Total  | GTA Total        | Toronto % of GTA |
|---------------------------------------|------------------------|----------------|------------------|------------------|
| 1994 - 1998                           | 4,585                  | 22,925         | 107,469          | 21.3%            |
| 1999 - 2003                           | 9,993                  | 49,964         | 203,610          | 24.5%            |
| 2004 - 2008                           | 11,646                 | 58,230         | 201,001          | 29.0%            |
| 2009 - 2013                           | 14,085                 | 70,427         | 167,711          | 42.0%            |
| 2014 - 2018                           | 17,317                 | 86,584         | 190,581          | 45.4%            |
| 2019 - 2023                           | 17,741                 | 88,707         | 180,504          | 49.1%            |
| <b>Total</b>                          | <b>-</b>               | <b>376,837</b> | <b>1,050,876</b> | <b>35.9%</b>     |
| 30 Year Annual Average<br>1994 - 2023 | 12,561                 |                | 35,029           | 35.9%            |
| 10 Year Annual Average<br>2014 - 2023 | 17,529                 |                | 37,109           | 47.2%            |

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



## Purpose-Built Rental Development

A mix of housing options, including rental and ownership tenure, is important for meeting the needs of a diverse city like Toronto. While condominium ownership units continue to be the predominant tenure for proposed residential units in the Pipeline, the number of proposed purpose-built rental units is increasing.

The Development Pipeline tracks the intended tenure of projects, although the applicant may change this during the development process. As such, the numbers of proposed purpose-

built rental units for Active and Under Review development projects are subject to change. It should also be noted that while the Development Pipeline tracks purpose-built rental units through the City's development approvals process, it does not capture the secondary rental market.

Within the 2023 Q4 Development Pipeline, 539 projects propose to incorporate purpose-built rental units. Purpose-built rental units account for 15% of the total proposed residential units, or 120,301 units (see Tables 8 and 9 and Map 4 on page 17).

Three-quarters of purpose-built rental units in the Pipeline are in Growth Management Areas. A greater proportion of proposed rental units are located in the Downtown and Central Waterfront and along the Avenues compared to all proposed units in the overall Pipeline.

**Table 8: Proposed Purpose-Built Rental Projects in the City of Toronto by Status**

|                                 | Under Review | Active     | Built     | Total in Pipeline | % of Total  | % of Growth Areas |
|---------------------------------|--------------|------------|-----------|-------------------|-------------|-------------------|
| <b>City of Toronto</b>          | <b>215</b>   | <b>225</b> | <b>99</b> | <b>539</b>        | <b>100%</b> |                   |
| <b>Growth Areas</b>             | <b>164</b>   | <b>159</b> | <b>76</b> | <b>399</b>        | <b>74%</b>  | <b>100%</b>       |
| Downtown and Central Waterfront | 44           | 57         | 26        | 127               | 24%         | 32%               |
| Centres                         | 12           | 19         | 9         | 40                | 7%          | 10%               |
| Avenues                         | 87           | 59         | 28        | 174               | 32%         | 44%               |
| Other Mixed Use Areas           | 21           | 24         | 13        | 58                | 11%         | 15%               |
| All Other Areas                 | 51           | 66         | 23        | 140               | 26%         |                   |

**Table 9: Proposed Purpose-Built Rental Units in the City of Toronto by Status**

|                                 | Under Review  | Active        | Built         | Total in Pipeline | % of Total  | % of Growth Areas |
|---------------------------------|---------------|---------------|---------------|-------------------|-------------|-------------------|
| <b>City of Toronto</b>          | <b>47,734</b> | <b>54,309</b> | <b>18,258</b> | <b>120,301</b>    | <b>100%</b> |                   |
| <b>Growth Areas</b>             | <b>40,089</b> | <b>39,523</b> | <b>15,455</b> | <b>95,067</b>     | <b>79%</b>  | <b>100%</b>       |
| Downtown and Central Waterfront | 10,024        | 15,205        | 6,331         | 31,560            | 26%         | 33%               |
| Centres                         | 3,313         | 6,959         | 1,856         | 12,128            | 10%         | 13%               |
| Avenues                         | 19,221        | 9,250         | 4,382         | 32,853            | 27%         | 35%               |
| Other Mixed Use Areas           | 7,531         | 8,109         | 2,886         | 18,526            | 15%         | 19%               |
| All Other Areas                 | 7,645         | 14,786        | 2,803         | 25,234            | 21%         |                   |

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

Development projects with activity between January 1, 2019 and December 31, 2023. 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.

The City's Official Plan policies (3.2.1.6 and 3.2.1.11) and Chapter 667 of the Toronto Municipal Code (which contains the Rental Housing Demolition and Conversion Control By-law) protect against the demolition or conversion of rental housing on sites containing six or more rental units. These policies require demolished or converted units to be replaced by the same number of units at a similar rent for the purpose of sustaining Toronto's rental housing stock.

Considering this replacement requirement, Table 10 estimates the total number of net new rental units by subtracting existing rental units from total rental units, which includes both retained and proposed

units. The Pipeline contains 159,387 purpose-built rental units, of which 48,324 are existing rental units, the majority (81%) of which are intended to be retained and approximately 9,238 proposed to be demolished. If all projects in the 2023 Q4 Pipeline proposing purpose-built rental units were realized, there would be approximately 111,063 net new purpose-built rental units.

This estimate should be cautiously interpreted as the recording of existing units was introduced in 2018, so the number of existing units submitted prior to this date may be inaccurate. In addition, the Pipeline does not capture purpose-built rental units in smaller developments that do not require a Planning application.

**Table 10: Net New Purpose-Built Rental Units in the City of Toronto by Status**

|                        | Existing<br>Rental Units | Retained<br>Rental Units | Proposed Rental<br>Units | Total<br>Rental Units | Approximate Net<br>New Rental Units |
|------------------------|--------------------------|--------------------------|--------------------------|-----------------------|-------------------------------------|
| <b>City of Toronto</b> | <b>48,324</b>            | <b>39,086</b>            | <b>120,301</b>           | <b>159,387</b>        | <b>111,063</b>                      |
| <b>Under Review</b>    | 17,610                   | 13,362                   | 47,734                   | 61,096                | 43,486                              |
| <b>Active</b>          | 22,466                   | 18,679                   | 54,309                   | 72,988                | 50,522                              |
| <b>Built</b>           | 8,248                    | 7,045                    | 18,258                   | 25,303                | 17,055                              |

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

Development projects with activity between January 1, 2019 and December 31, 2023. 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.

## profile TORONTO - 17



## Unit Types

In 2020, City Council adopted the *Growing Up: Planning for Children in New Vertical Communities Urban Design Guidelines* (“the Growing Up Guidelines”), which encourage private developers to build family-friendly units, defined as large units containing two or more bedrooms. The Guidelines recommend that mid- and high-rise residential buildings should provide a minimum of 25% of its total residential units as large units that are suitable for families; 10% of units should be three bedrooms or greater, and 15% should be two-bedroom units.

Based on information submitted by applicants, the large majority of the proposed units in the pipeline are within mid- and high-rise buildings.<sup>4</sup> Table 11 provides a breakdown of proposed unit types by number of bedrooms where this information has been provided by the applicants. Of

the 668,660 units, most proposed units (61%) are in the form of 1-bedroom or studio apartments, with the remaining 39% having two or more bedrooms (see Table 11). These proportions are similar to that seen in the entire pipeline, regardless of height (see Appendix Table A.5 on page 57). Additionally, there are 100,532 residential units (13% of the total units proposed) for which the breakdown has not been provided by the applicant. Unit breakdowns are, at times, not provided in the early stages of a Planning Application and are provided later as the application progresses through the approvals process.

The total number of family-suitable units proposed within mid- and high-rise buildings suggests that the City is on track to achieving the targets set out by the Growing Up Guidelines.

Table A.6 in the Appendix (on page 57) shows the average size of units in submitted applications has decreased from 81 m<sup>2</sup> in 2013 to 66 m<sup>2</sup> in 2023. This is a crude estimate based on dividing the total proposed residential GFA by the total proposed residential units, and thus the averages are reflective of the large number of studio and one-bedroom apartments proposed in the Pipeline. An analysis of the average physical size of each unit type would be a beneficial topic of future study to determine whether the Growing Up Guidelines pertaining to unit sizes are being met.

**Table 11: Proposed Unit Types in Mid- and High-Rise Buildings in the City of Toronto by Status**

|                        | Studio Units  | 1-Bedroom Units | 2-Bedroom Units | 3+ Bedroom Units | Total Residential Units |
|------------------------|---------------|-----------------|-----------------|------------------|-------------------------|
| <b>City of Toronto</b> | <b>44,436</b> | <b>360,997</b>  | <b>196,661</b>  | <b>66,566</b>    | <b>668,660</b>          |
| <b>Under Review</b>    | 22,582        | 187,187         | 89,471          | 34,551           | <b>333,791</b>          |
| <b>Active</b>          | 15,977        | 121,394         | 72,779          | 24,876           | <b>235,026</b>          |
| <b>Built</b>           | 5,877         | 52,416          | 34,411          | 7,139            | <b>99,843</b>           |
| <b>% of Total</b>      | <b>6.6%</b>   | <b>54.0%</b>    | <b>29.4%</b>    | <b>10.0%</b>     | <b>100.0%</b>           |
| <b>Under Review</b>    | 6.8%          | 56.1%           | 26.8%           | 10.4%            | 100.0%                  |
| <b>Active</b>          | 6.8%          | 51.7%           | 31.0%           | 10.6%            | 100.0%                  |
| <b>Built</b>           | 5.9%          | 52.5%           | 34.5%           | 7.2%             | 100.0%                  |

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

Proposed residential units in development projects with activity between January 1, 2019 and December 31, 2023. 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: The number of units only includes units in projects in which the tallest proposed building is five stories or greater, and which the proposed generalized land use is Mixed Use or Residential Apartments, and thus may include units in buildings less than five stories if part of a larger development.

## Non-Residential Development

Across the 2,344 projects that are within the 2023 Q4 Pipeline, 1,701 projects propose non-residential gross floor area (GFA), totaling 13,958,669 m<sup>2</sup> about the equivalent of 51 Yorkdale Malls (see Table 12 and Maps 5 and 6 on pages 20 and 21).

Between the 2021 Pipeline<sup>5</sup> and the 2023 Pipeline, non-residential GFA proposed throughout the city increased slightly, by 8,181 m<sup>2</sup>, an increase of 0.1%, almost all of which was proposed in areas outside of the growth management areas. Non-residential development activity is stable but becoming more distributed throughout the city. The Growth Management Areas of the Official Plan have generally maintained their respective shares of proposed non-residential development since 2021. All the reported areas generally maintained their share of proposed non-residential development since 2021.

A total of 2,970,854 m<sup>2</sup> of non-residential GFA was built across the city between 2019 and 2023, one-fifth of the total Pipeline. The majority (62%) of this non-residential GFA was built within the designated Growth Areas.

The largest share (42%) of non-residential GFA is within Active projects, totaling 5,834,093 m<sup>2</sup>. The majority of non-residential GFA in Active projects are those which have received at least one Planning Approval (62% or 3,627,682 m<sup>2</sup>) but are either still going through the development approvals process in the form of a Site Plan Control application or have not yet applied for Building Permits despite being issued the necessary approvals.

Once a project receives the necessary Planning approvals, Building Permits must be obtained to initiate construction. The

Pipeline contains 515,070 m<sup>2</sup> of non-residential GFA (9%) within projects that have submitted Building Permit applications but have not yet been issued the necessary permits to initiate construction. This low percentage suggests that a large proportion of non-residential development, once approved, advances to construction. About 29% of non-residential GFA (1,691,341 m<sup>2</sup>) in the 2023 Pipeline is within projects that have been issued a Building Permit and thus are assumed to have started construction but that are not yet completed. For every 100 m<sup>2</sup> of Council-approved non-residential space, 61 m<sup>2</sup> is under construction.

About 37% of proposed non-residential GFA is in projects that are Under Review (5,153,723 m<sup>2</sup>).

**Table 12: Proposed Non-Residential GFA in the City of Toronto by Status**

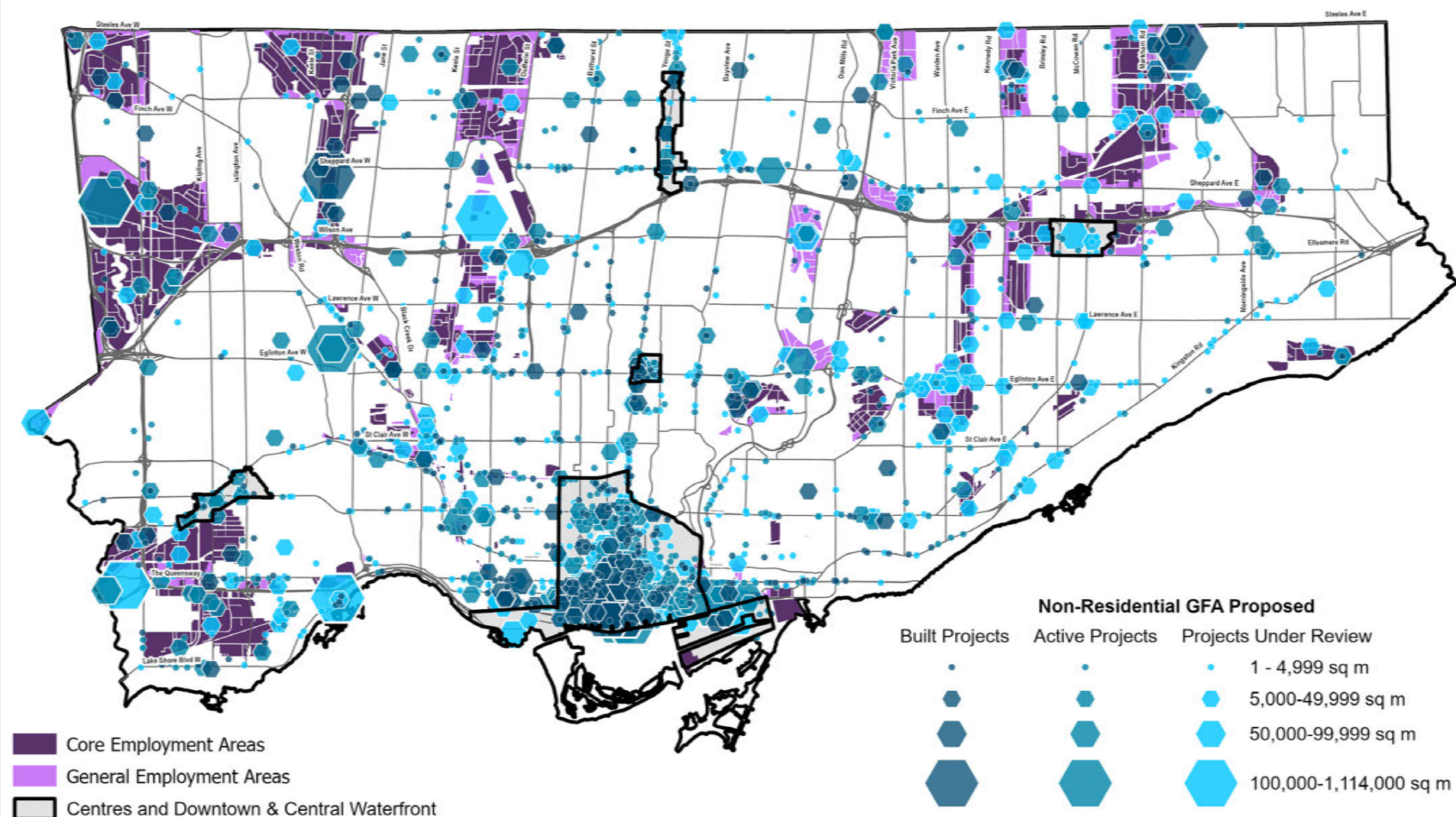
|  | Under Review     | Active           |                                |                    |                  | Built            | Total in Pipeline | % of Total   | % of Growth Areas |
|--|------------------|------------------|--------------------------------|--------------------|------------------|------------------|-------------------|--------------|-------------------|
|  |                  | Total Active     | Delegated/<br>Council Approval | Permit Application | Work Started     |                  |                   |              |                   |
| <b>City of Toronto</b>                 | <b>5,153,722</b> | <b>5,834,092</b> | <b>3,627,683</b>               | <b>515,069</b>     | <b>1,691,342</b> | <b>2,970,855</b> | <b>13,958,669</b> | <b>100.0</b> |                   |
| <b>Growth Areas</b>                    | <b>2,613,591</b> | <b>3,210,156</b> | <b>1,993,283</b>               | <b>418,928</b>     | <b>797,946</b>   | <b>1,831,040</b> | <b>7,654,787</b>  | <b>54.8</b>  | <b>100.0</b>      |
| <b>Downtown and Central Waterfront</b> | 1,037,970        | 2,205,854        | 1,556,452                      | 231,655            | 417,747          | 1,458,019        | <b>4,701,843</b>  | 33.7         | 61.4              |
| <b>Centres</b>                         | 194,497          | 237,582          | 75,752                         | 104,871            | 56,960           | 36,176           | <b>468,255</b>    | 3.4          | 6.1               |
| <b>Avenues</b>                         | 518,163          | 400,451          | 252,068                        | 27,701             | 120,682          | 197,004          | <b>1,115,618</b>  | 8.0          | 14.6              |
| <b>Other Mixed Use Areas</b>           | 862,961          | 366,269          | 109,011                        | 54,701             | 202,557          | 139,841          | <b>1,369,071</b>  | 9.8          | 17.9              |
| <b>All Other Areas</b>                 | 2,540,131        | 2,623,936        | 1,634,400                      | 96,141             | 893,396          | 1,139,815        | <b>6,303,882</b>  | 45.2         |                   |

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

Development projects with activity between January 1, 2019 and December 31, 2023. Built projects are those which became ready for occupancy and/or were completed. Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or those which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal.



## Map 5: Proposed Non-Residential Development



Source: Land Use Information System II

Development projects with activity between January 1, 2019 and December 31, 2023. Built projects are those which became ready for occupancy and/or were completed.

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

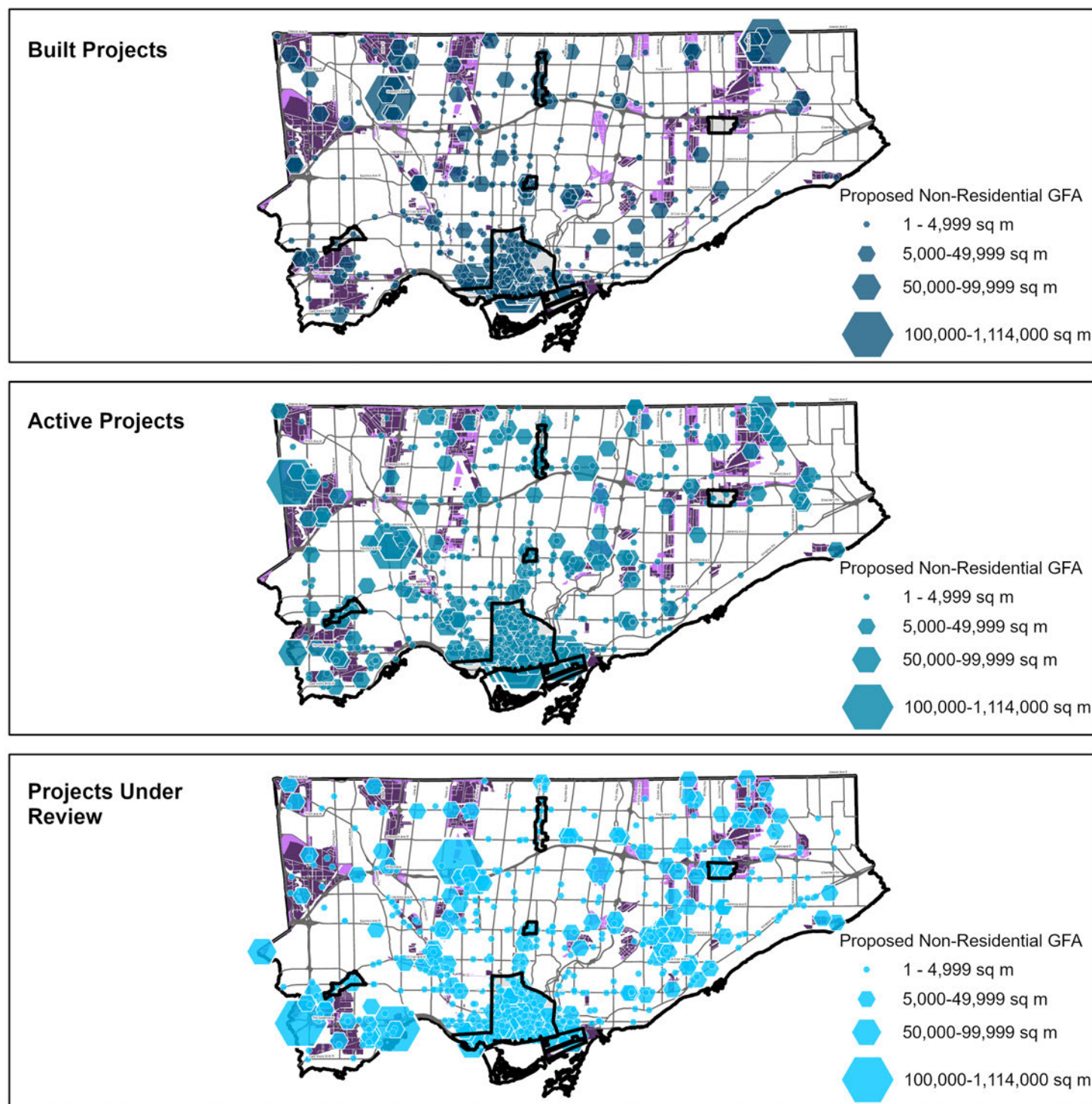
Projects under review are those which have not yet been approved or refused and those which are under appeal.

Prepared by: Toronto City Planning Division, Planning Research and Analytics - June, 2024

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**Map 6: Non-Residential Development by Status**






Source: Land Use Information System II

Development projects with activity between January 1, 2019 and December 31, 2023. Built projects are those which became ready for occupancy and/or were completed. Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal.

Prepared by: Toronto City Planning Division, Planning Research and Analytics - June, 2024

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



Just over half (7,654,787 m<sup>2</sup>) of the proposed non-residential GFA is located with the city's Growth Management Areas, while the remaining 45% (6,303,882 m<sup>2</sup>) is located in All Other Areas, including in designated Employment Areas.

Non-residential projects are growing in size, especially in designated Employment Areas. The average amount of non-residential GFA in Under Review and Active projects is over 20% greater than in Built projects. However, this varies across

different areas of the city, with some geographies having seen a decline in average project size (see Table 13).

The Development Pipeline tracks and reports on project elements that are newly proposed and existing elements that will be retained. Out of a total of 20,464,408 m<sup>2</sup> of non-residential GFA in development proposals, over two-thirds of the total is proposed while the remainder is retained from the previous uses (see Table 14).

**Table 13: Average Non-Residential Gross Floor Area Per Project by Status**

|                                 | Under Review | Active       | Built        | Total in Pipeline |
|---------------------------------|--------------|--------------|--------------|-------------------|
| <b>City of Toronto</b>          | <b>6,063</b> | <b>6,425</b> | <b>5,070</b> | <b>5,955</b>      |
| <b>Growth Areas</b>             | <b>4,577</b> | <b>5,423</b> | <b>4,870</b> | <b>4,974</b>      |
| Downtown and Central Waterfront | 6,920        | 10,072       | 9,785        | 9,077             |
| Centres                         | 4,523        | 4,168        | 1,507        | 3,776             |
| Avenues                         | 1,912        | 1,764        | 1,387        | 1,743             |
| Other Mixed Use Areas           | 8,065        | 4,115        | 2,292        | 5,327             |
| <b>All Other Areas</b>          | <b>9,104</b> | <b>8,304</b> | <b>5,428</b> | <b>7,831</b>      |

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

Proposed residential units and non-residential GFA in development projects with activity between January 1, 2019 and December 31, 2023. Built projects are those which became ready for occupancy and/or were completed. Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or those which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal. Gross floor area values are expressed in square metres.

**Table 14: Proposed, Retained and Total Non-Residential GFA**

|                        | Retained         | Proposed          | Total             | % of Total that are Newly Proposed |
|------------------------|------------------|-------------------|-------------------|------------------------------------|
| <b>City of Toronto</b> | <b>6,505,739</b> | <b>13,958,669</b> | <b>20,464,408</b> | <b>68.2%</b>                       |
| Under Review           | 1,950,098        | 5,153,722         | 7,103,820         | 72.5%                              |
| Active                 | 2,928,084        | 5,834,092         | 8,762,176         | 66.6%                              |
| Built                  | 1,627,557        | 2,970,855         | 4,598,412         | 64.6%                              |

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

Proposed, retained and total residential units, residential GFA and non-residential GFA in development projects with activity between January 1, 2019 and December 31, 2023. Built projects are those which became ready for occupancy and/or were completed. Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or those which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal. Gross floor area values are expressed in square metres. Citywide demolition rate is based on Demolition Permits issued 2005-2020 versus CMHC Completions over the same period.

## Approved and Built Non-Residential GFA by Year

Similar to proposed residential units, Council approved more non-residential GFA than was built over the five years from 2019 to 2023 (see Table 15).

City Council approved an average of 550,886 m<sup>2</sup> of non-residential GFA per year between 2019 and 2023 pertaining only to Official Plan Amendment and/or Zoning By-law Amendment applications. Projects typically apply for Building Permits once they have received a final Planning approval in the form of a Notice of Approval Conditions (NOAC) or Statement of Approval for a Site Plan Control application. Considering only projects that have received a final Planning approval,

the City approved an average of 618,009 m<sup>2</sup> of non-residential GFA per year between 2019 and 2023. This is a surplus of 131,943 m<sup>2</sup> on average or a total of 127% of the average annual production through the Pipeline.

For development projects with activity between 2019 and 2023, about 88% of non-residential GFA that has received a first Planning approval on an Official Plan Amendment or Zoning By-law Amendment application has been built. About three-quarters of non-residential GFA which has received final Planning approval on a Site Plan Control application has been built.

**Table 15: Non-Residential Gross Floor Area Approved and Built by Year, 2019-2023**

| Year                       | GFA Approved<br>(Official Plan Amendment or<br>Rezoning Approval) | GFA Approved<br>(Approval on Site Plan<br>Control Application) | GFA Built        |
|----------------------------|---|--|------------------|
| 2019                       | 803,589   | 846,818  | 374,771          |
| 2020                       | 242,469   | 541,469  | 778,174          |
| 2021                       | 528,346   | 559,960  | 462,593          |
| 2022                       | 865,746   | 622,413  | 376,622          |
| 2023                       | 314,278   | 519,386  | 438,170          |
| <b>Total</b>               | <b>2,754,428</b>  | <b>3,090,046</b>   | <b>2,430,330</b> |
| 5 Year Average (2019-2023) | 550,886   | 618,009  | 486,066          |

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

Proposed residential units in development projects with activity between January 1, 2019 and December 31, 2023. Units approved (first approval) are units in projects that received their first planning approval in the year listed, in the form of an Official Plan Amendment or Zoning By-law Amendment approval, or Notice of Approval Conditions (NOAC) for a Site Plan Application. Units approved (final approval) are units in projects that received NOAC for a Site Plan Application in the year listed. Units built are units in projects that became ready for occupancy and/or were completed in the year listed.

## Toronto's Non-Residential Market

Higher interest rates and inflationary pressures in 2023 slowed investment activity in both residential and non-residential development and across all major markets in Canada.<sup>6</sup> The impact on commercial real estate has varied through the COVID-19 recovery period. While the office sector has experienced negative impacts varying by the class of office space, retail and hotels have seen a positive recovery.

### Office

Office uses are more than one-third of proposed non-residential GFA (5,011,924 m<sup>2</sup>), most of which is in Active projects (59%) while only 20% is in projects Under Review. The decrease in proposed GFA between Active and Under Review projects reflects the industry's restraint in new office construction due to vacancies in older space, rising interest rates, reduced demand, a shortage of skilled labour, and inflationary pressures on construction and material costs.<sup>7</sup>

According to CBRE, Toronto accounts for 99% of the office space currently under construction in the GTA, and Downtown alone accounts for 84%.<sup>8,9</sup> Outside of Downtown, the bulk of office space construction is occurring in the East York/Don Mills South, North Yonge, and Eglinton Yonge areas. For projects in the 2023 Pipeline, Office uses constitute the largest proportion of non-residential uses in Downtown and the Central

Waterfront and all the Centres except for Scarborough Centre, where most non-residential uses proposed are retail.

Overall office vacancy in Toronto reached an all-time high at 17% in 2023 Q4 as the market continued to face uncertain market conditions, up from 12% in 2022 Q2 and from 4% in 2019 prior to the start of the pandemic.<sup>10</sup> Not all office space is the same, however, with Class AAA office space and newer office buildings built after 2009 having vacancies of 6% and 8% respectively, while vacancy in older buildings was 18%.

Projects that have already begun construction are likely to continue to proceed through to occupancy, while those still in the planning stages are seeing delays or modifications to proposed non-residential components. The City is currently studying these issues through the Office Space Needs Study.<sup>11</sup>

**Table 16: Proposed Non-Residential Gross Floor Area by Use Type**

|   | Under Review     | Active           | Built            | Total in Pipeline | % of Total    |
|---|------------------|------------------|------------------|-------------------|---------------|
| <b>Total Proposed Non-Residential GFA</b> | <b>5,153,723</b> | <b>5,834,093</b> | <b>2,970,854</b> | <b>13,958,670</b> | <b>100.0%</b> |
| <b>Office</b>                             | 992,935          | 2,969,641        | 1,049,349        | 5,011,925         | 35.9%         |
| <b>Retail</b>                             | 978,757          | 825,636          | 432,154          | 2,236,547         | 16.0%         |
| <b>Industrial</b>                         | 782,808          | 549,489          | 697,503          | 2,029,800         | 14.5%         |
| <b>Institutional and Other</b>            | 1,285,223        | 1,489,326        | 791,849          | 3,566,398         | 25.5%         |
| <b>Use not yet determined</b>             | 1,114,000        | -                | -                | 1,114,000         | 8.0%          |

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

Development projects with activity between January 1, 2019 and December 31, 2023. 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: Use breakdown is estimated in cases that have retained non-residential GFA as well as more than one type of proposed non-residential use.



### ***Retail***

Retail uses are 16% of all proposed non-residential GFA, with about 19% contained in Built projects, 37% in Active projects, and 44% in projects Under Review (see Table 16). This pattern indicates an increase in the quantity of Retail uses being proposed. Proposed retail GFA is evenly distributed throughout the city, with the largest proportion located in Other Mixed Use Areas, followed by Downtown and the Central Waterfront, along the Avenues, and in All Other Areas (see Appendix Table A.7a on page 58).

### ***Industrial***

Industrial uses are about 15% of all proposed non-residential GFA, with about 39% in projects Under Review (see Appendix Table A.7b on page 59).

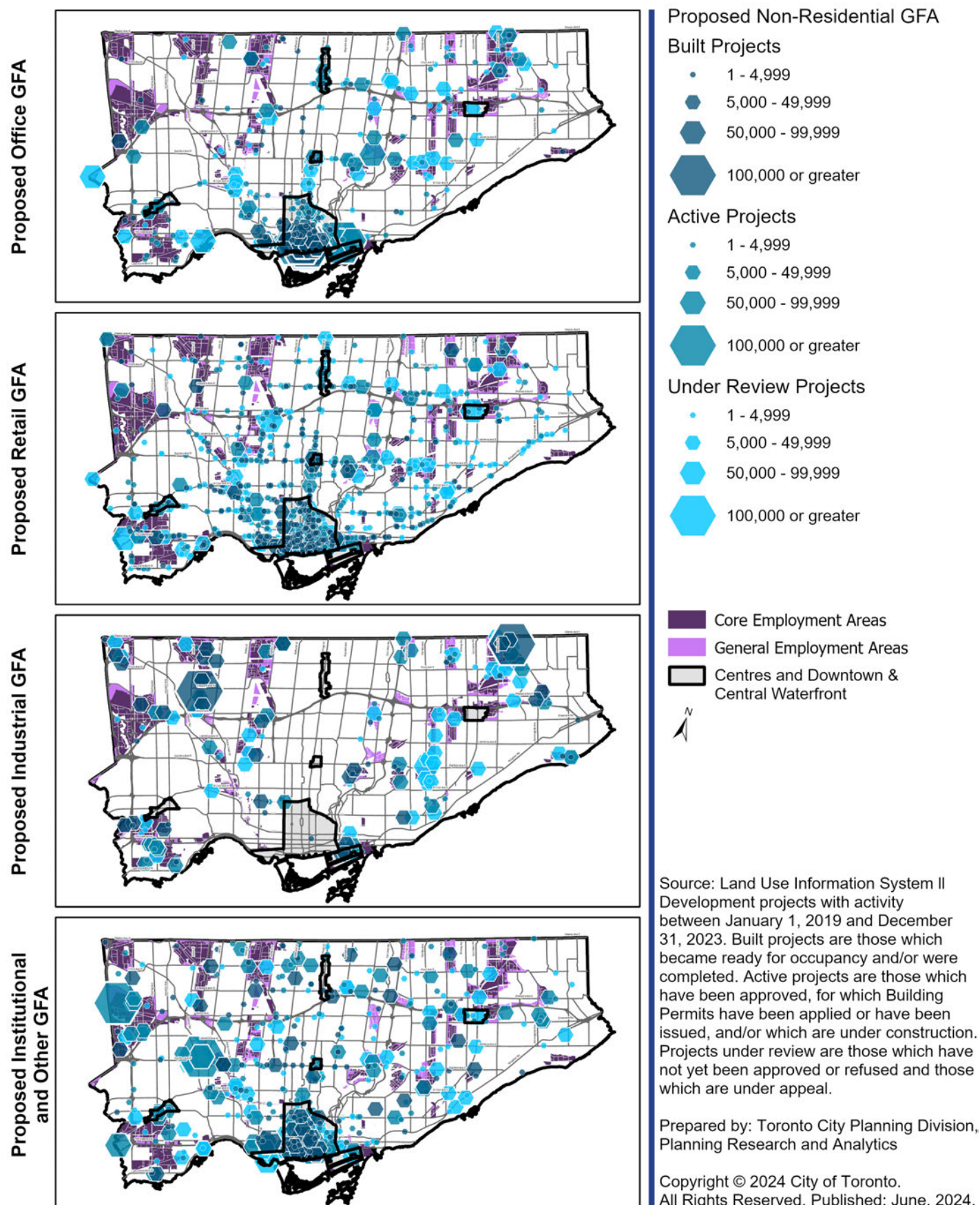
Most proposed industrial GFA is located in All Other Areas (88%), mostly within designated Employment Areas, as shown on Map 7 (see pages 33 to 35 for more on Employment Areas). In 2023 Q4, Toronto accounted for 7% of all the industrial GFA currently under construction in the GTA,<sup>12</sup> a decrease of 11% from 18% in 2022 Q4.<sup>13</sup>

### ***Institutional and Other***

Institutional and Other GFA, which includes community services and facilities space as well as care homes, is just over one-quarter of all proposed non-residential GFA. The amount of Institutional and Other GFA in Active and Under Review projects is each about double that in Built projects.

Institutional and Other GFA is also distributed throughout the city, with about 40% proposed within the Downtown and Central Waterfront, and another 40% proposed in All Other Areas.

**Map 7: Proposed Non-Residential GFA by Use Type and Status**



# Area Specific Analysis

## Development in Toronto’s Growth Management Areas

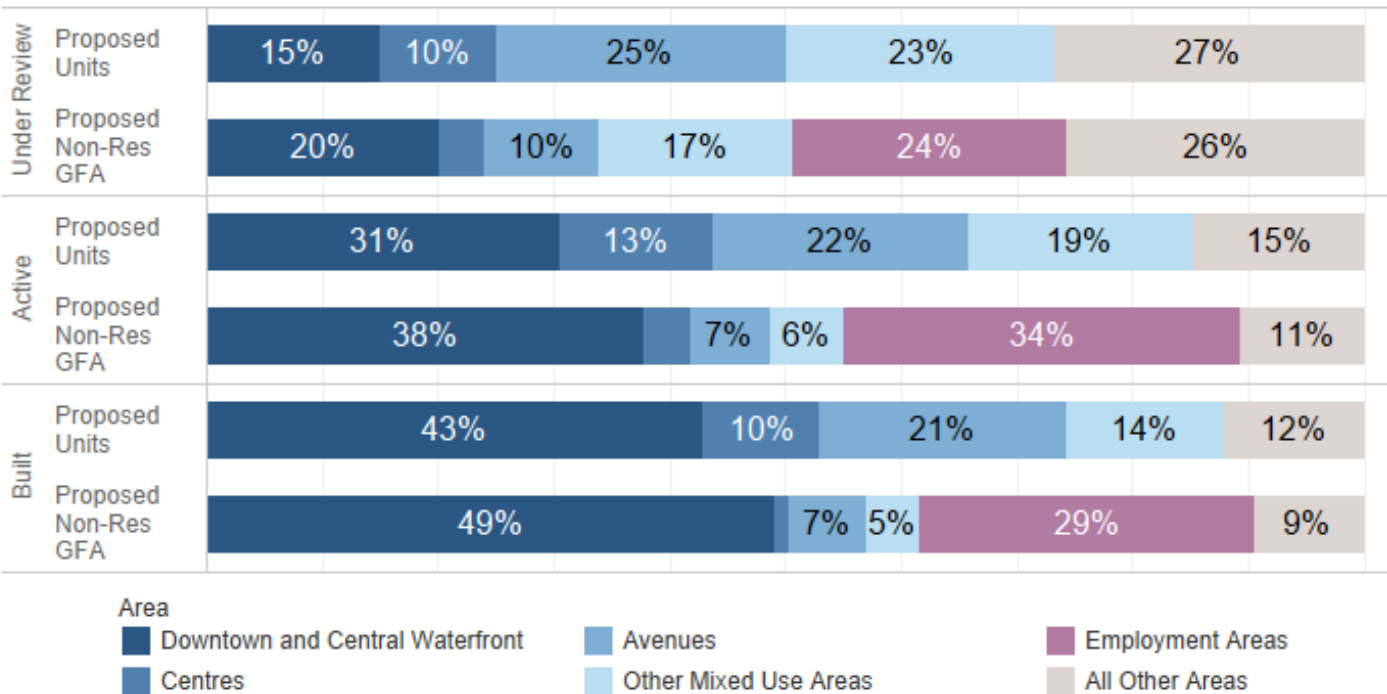
Toronto’s Official Plan sets out the urban structure of the city to guide its development over the next few decades. The Plan outlines a strategy for directing intensification within this structure and establishes policies for managing change through the integration of land use and transportation. Some areas of the city identified for intensification also need more detailed guidance in the form of Secondary Plans, area studies, and policies to guide local planning and innovative implementation solutions.

The Plan is intended to contribute to a future in which the public and private sectors work together and act as stewards of the city, leading Toronto to be a place where housing choices and economic opportunities are available for all people in their communities.

Within the 2023 Q4 Development Pipeline, 79% of residential units and 55% of non-residential GFA are proposed in areas currently targeted for growth by the City’s Official

Plan, specifically Downtown and the Central Waterfront, the Centres, the Avenues, and other Mixed Use Areas (see Tables 3 and 12 on pages 8 and 19). Figure 3 breaks down the proportion of proposed residential units and non-residential GFA by Pipeline status. As discussed in the preceding sections examining residential and non-residential development trends, there has been an increasing amount of development proposed outside of the City’s Growth Management Areas.

**Figure 3: Proposed Residential Units and Non-Residential GFA in Growth Management Areas by Status**



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

Development projects with activity between January 1, 2019 and December 31, 2023. 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: Use breakdown is estimated in cases that have retained non-residential GFA as well as more than one type of proposed non-residential use.

## ***Downtown and Central Waterfront***

Downtown and the Central Waterfront area is one of the most prominent locations for development activity in the city, containing the largest concentration of proposed residential units and non-residential GFA of any growth management area. In the 2023 Q4 Development Pipeline, there are 518 projects proposing 189,882 residential units and 4,701,843 m<sup>2</sup> of non-residential GFA within the Downtown and Central Waterfront area. This comprises 22% of the total projects, 24% of the total residential units and 34% of the total non-residential GFA proposed in the entire city (see Tables 2, 3 and 12 on pages 5, 8 and 19). This concentration of growth is notable given that Downtown and the Central Waterfront only make up 3% of the city's land area.

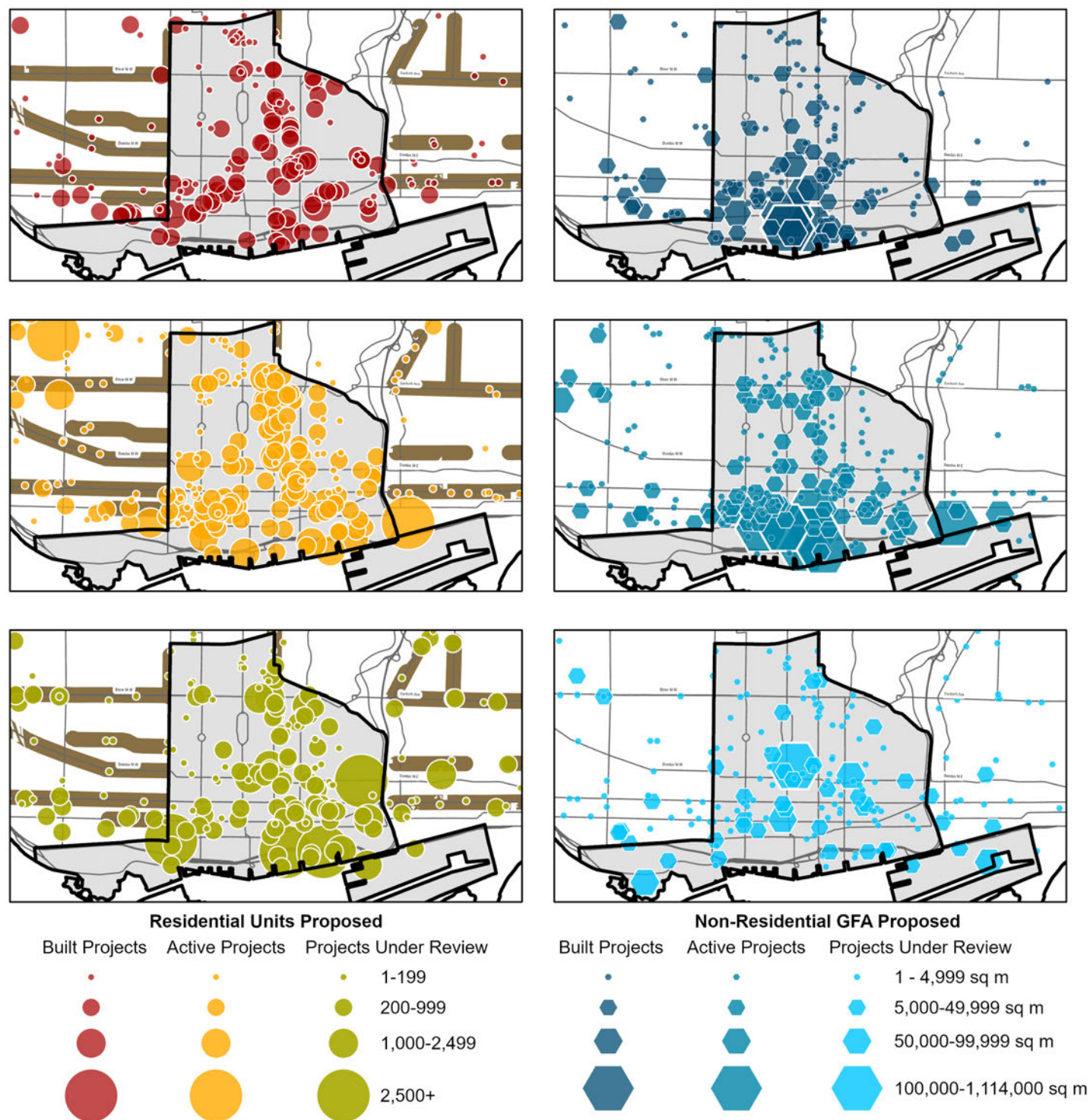
Map 8 (on page 29) shows the distribution of residential and non-residential projects throughout Downtown. Residential development activity has been occurring across the Downtown area, though there is a small pattern of Active projects clustered along the Yonge Street corridor. Comparing the different Pipeline statuses shows the increasing scale of residential projects in the area. Map 8 also shows the decreasing scale and activity of non-residential projects Downtown. The absence of larger Under Review projects, particularly south of Queen Street, is noticeable. This reflects the long-term conversion of former industrial areas to residential and mixed use areas through decades of managed land use planning.

Large-scale residential projects are becoming more common across the city, including in Downtown and the Central Waterfront area. Of the 34 projects proposing 2,500 units or more, four of them are located Downtown and together propose close to 15,000 units (see Appendix Table A.8 on page 60). The largest residential project Downtown is 595 Front St W, which proposes to deck over the rail corridor and build five towers including just over 5,750 units, approximately 22,000 m<sup>2</sup> of non-residential GFA, and on-site parkland.

Downtown and the Central Waterfront is also a focal point for large-scale non-residential development. In the current Pipeline, ten of the 18 projects proposing over 100,000 m<sup>2</sup> of non-residential GFA are located in the Downtown and Central Waterfront area, and together propose over 1,520,000 m<sup>2</sup> of non-residential GFA (see Table A.9 on page 61). While most of the large non-residential projects within Downtown are predominately proposing office space, other proposed non-residential uses include a hotel as part of the development at 1 Yonge St and the expansion of Sick Kids Hospital at 555 University Ave.



Map 8: Downtown and Central Waterfront Development Activity Status



Source: Land Use Information System II  
Development projects with activity between January 1, 2019 and December 31, 2023. Built projects are those which became ready for occupancy and/or were completed. Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal.

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Published: June, 2024.

Avenues   
Centres and Downtown & Central Waterfront 



## Centres

The four Centres, Etobicoke, North York, Scarborough and Yonge-Eglinton, are focal points of transit infrastructure where jobs, housing, and services are concentrated. The Centres play an important role in managing the city's growth, as the Official Plan encourages creating concentrations of workers and residents at these locations, resulting in significant centres of economic activity accessible by transit. Each Centre is unique in terms of its local character, its demographics, its potential to grow and its scale. To respect these differences, each Centre has its own Secondary Plan to guide intensification while ensuring the presence of an attractive public realm and necessary amenities.

There are 124 projects in the Development Pipeline located in the Centres or 5% of all projects, containing 11% of the city's total proposed residential units (88,973 units) and 3% of total proposed non-residential GFA (468,255 m<sup>2</sup>). Around 81% of proposed residential units (72,092) in the Centres are either under review or approved but have not yet been issued Building Permits, meaning that there is likely to be substantial construction in the Centres in coming years.

All four Centres contain development activity, though it is not evenly distributed. Table 17 shows that Yonge-Eglinton Centre contains the majority of residential units built over the last five years, while North York Centre contains the majority of built non-residential GFA. Etobicoke Centre has the largest amount of both Active residential units and non-residential GFA. Scarborough Centre has the largest amount of both residential units and non-residential GFA under review – accounting for around half of all proposed residential units (54%) and non-residential GFA (51%) under review in the Centres. Yonge-Eglinton Centre also contains a large amount of proposed non-residential GFA.

Residential projects in the Centres are generally larger developments with an average of 718 residential units per project, the highest average project size of all the Growth Areas (see Table 4 on page 11). In comparison, the citywide average is 342 units per project and Downtown and the Central Waterfront has an average of 367 units per project. Projects located in the Centres are becoming progressively larger in scale, with Under Review projects having an average 1,030 units per

project, compared to 594 for Active projects and 451 for Built projects.

Five of the 34 largest projects (those containing 2,500 residential units or more) proposed in the Pipeline are located within the Centres (see Appendix Table A.8 on page 60). Two are located in Scarborough and two are located in Etobicoke, areas that have experienced slower growth historically compared to Yonge-Eglinton and North York Centres.

The proposed development in the Pipeline will enable the continued intensification of all four Centres, each growing as a residential and employment hub where people can live close to their work or easily get to their jobs by transit. This intensification will be most dramatic in Yonge-Eglinton Centre. Yonge-Eglinton is already the city's densest growth management area, in terms of people and jobs per hectare (see Appendix Table A.12 on page 66), and the Pipeline indicates the density level will only increase.

**Table 17: Proposed Residential Units and Non-Residential GFA in Urban Growth Centres**

|                              | Proposed Residential Units |               |               |                   | Proposed Non-Residential GFA |                |               |                   |
|------------------------------|----------------------------|---------------|---------------|-------------------|------------------------------|----------------|---------------|-------------------|
|                              | Under Review               | Active        | Built         | Total in Pipeline | Under Review                 | Active         | Built         | Total in Pipeline |
| <b>Centres Total</b>         | <b>44,283</b>              | <b>33,861</b> | <b>10,829</b> | <b>88,973</b>     | <b>194,498</b>               | <b>237,582</b> | <b>36,176</b> | <b>468,256</b>    |
| <b>Etobicoke Centre</b>      | 4,732                      | 13,238        | 1,552         | <b>19,522</b>     | 13,031                       | 126,555        | 6,834         | <b>146,420</b>    |
| <b>North York Centre</b>     | 5,844                      | 5,901         | 2,320         | <b>14,065</b>     | 12,747                       | 48,039         | 20,383        | <b>81,169</b>     |
| <b>Scarborough Centre</b>    | 23,996                     | 4,791         | -             | <b>28,787</b>     | 98,223                       | 6,983          | -             | <b>105,206</b>    |
| <b>Yonge-Eglinton Centre</b> | 9,711                      | 9,931         | 6,957         | <b>26,599</b>     | 70,497                       | 56,005         | 8,959         | <b>135,461</b>    |

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

Development projects with activity between January 1, 2019 and December 31, 2023. Built projects are those which became ready for occupancy and/or were completed. Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or those which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal. Gross floor area values are expressed in square metres.

## Avenues

The Avenues, as shown in the Official Plan's Urban Structure Map (see Map 1 on page 3), are corridors along major arterials that are well served by transit and expected to redevelop incrementally over time. They play an important role within Toronto's urban structure by providing locations for redevelopment outside of the Centres and Downtown.

The Avenues contain the most proposed projects of any of the growth management areas. These 640 projects account for 188,639 residential units and 1,115,618 m<sup>2</sup> of non-residential GFA proposed in the current Development Pipeline. This represents 27% of the total proposed projects in the city, 24% of proposed units and 8% of its proposed non-residential GFA. The majority (88%) of the proposed residential units are in projects that are Active or Under Review. Combined, these units represent seven times the magnitude of housing supply that has been built along Avenues over the past five years.

While the Avenues contain the greatest number of proposed projects compared to the other growth management areas, they are generally smaller in scale. This reflects the implementation of the Avenues and Mid-Rise Buildings Study and compatibility with the built context. The Mid-Rise Buildings Performance Standards are currently under review to provide greater flexibility in the development of mid-rise buildings. The average number of residential units proposed in projects along the Avenues is 295. However, the scale of projects along the Avenues is increasing, with Under Review projects having an average of 402 units, compared to 252 for Active projects and 159 for Built projects.

Similarly, the number of large projects (proposing 2,500 residential units or more) along the Avenues is increasing. Seven of the nine largest projects along the Avenues are under review, proposing a combined total of over 28,800 units, and the two largest Active projects along the Avenues propose close to 9,400 units (see Appendix Table A.8 on page 60).

There is 317,686 m<sup>2</sup> of non-residential GFA that has been built or is in an Active project that has initiated construction along the Avenues over the past five years. In addition, there is 279,769 m<sup>2</sup> of non-residential GFA proposed in Active projects that have received at least one Planning approval and/or have initiated the Building Permit approvals process. A total of 518,163 m<sup>2</sup> of non-residential GFA proposed along the Avenues is still under review (46% of the total), indicating that there is likely to be an increasing amount of non-residential construction on the Avenues in the future.

Many of the largest projects proposed along the Avenues are located on Eglinton Avenue (see Map 2 on page 9), representing a response from the development industry to the Eglinton Crosstown LRT. Other notable Avenue segments with large projects proposed along them are Sheppard Avenue and Yonge Street.

There is currently an Avenues Policy Review underway<sup>14</sup> to update the vision and policy direction for how Avenues will develop, extend and potentially introduce new Avenues, explore opportunities to streamline study requirements for new development along Avenues, and consider opportunities to create areas of transition between Avenues and Neighbourhoods to enable more housing.<sup>15</sup>

## Other Mixed Use Areas

Outside of Downtown and the Central Waterfront, the Centres, and the Avenues, many other locations throughout the city are designated as Mixed Use Areas. Mixed Use areas encourage a broad range of commercial, residential and institutional uses, and like the Avenues, provide locations for redevelopment outside of the Centres and Downtown.

Mixed Use Areas outside of the Avenues, Centres, and Downtown and Central Waterfront have 165,885 residential units and 1,369,071 m<sup>2</sup> of non-residential GFA proposed across 257 projects. This accounts for 11% of the city's total proposed projects, 21% of residential units and 10% of proposed non-residential GFA. Just over 91% of the proposed residential units in these areas are in projects that are either Under Review or Active. Similarly, 90% of the proposed non-residential development is in Active or Under Review projects. There were 10 projects in Mixed Use Areas proposing 2,500 residential units or more, totaling over 54,300 units (see Appendix Table A.8).

### **All Other Areas**

There were 805 development projects proposed outside of the growth management areas, the Downtown and Central Waterfront, the Centres, Avenues, and other Mixed Use Areas, or 34% of the total projects in the city. These areas collectively contain a total of 167,510 residential units (21% of the total units proposed), representing an additional 34,642 units, or an increase of 26%, compared to the 2021 Pipeline. Generally, these projects are infill developments in areas designated as Neighbourhoods or Apartment Neighbourhoods. The majority (70%) of the residential units proposed in All Other Areas are under review. Of the 34 large projects (those proposing 2,500 residential units or more) in the Pipeline, four are located in All Other Areas (see Appendix table A.8).

The increasing amount of residential development proposed in All Other Areas signals that development is becoming more dispersed across the city than it has previously been. This trend is likely to continue with Council's approval to permit townhouses and small-scale apartment buildings of up to six storeys and 60 units as-of-right on properties that are located along Major Streets and designated Neighbourhoods in the Official Plan.<sup>16</sup>

Expanding Housing Options in Neighbourhoods (EHON) Initiatives, including the approval of garden suites and multiplexes, enable the gentle intensification of Neighbourhood areas. This development activity will not be captured by the Development Pipeline, however, as these structure types are now permitted as-of-right and will not require a Site Plan Control application or Rezoning application unless they seek permissions above what is considered a Minor Variance from what is currently allowed.

There is 6,303,882 m<sup>2</sup> of non-residential GFA proposed in All Other Areas, or just under half of the total non-residential GFA in the Pipeline citywide. Almost two-thirds (65%) of this non-residential GFA is located in designated Core or General Employment Areas, which the Official Plan targets for non-residential growth (described further on pages 33 to 35). About one-quarter (27%) or 1,730,541 m<sup>2</sup> of non-residential GFA proposed in All Other Areas is in projects that have received at least one Planning approval or have applied for Building Permits, but that are not yet under construction, while 893,396 m<sup>2</sup> of proposed non-residential GFA is in projects that have initiated construction within the last five years.

## Employment Areas

Employment Areas, comprised of lands designated **Core Employment** or **General Employment** (see side bar for more information), are vital to Toronto's economic health. Designated within the Official Plan, Employment Areas are finite, geographically bounded, and are used primarily for economic activities.<sup>17</sup> Employment Areas provide a level of land use certainty that can help businesses make long-term investment decisions that support the city's economy and provide employment opportunities.

In the 2023 Pipeline there were 287 projects in Employment Areas, containing 4,072,077 m<sup>2</sup> of non-residential GFA, or 29% of the total proposed in the city (see Table 18, and Maps 5 and 6 on pages 20 and 21). The concentration of non-residential development in Employment Areas, which make up approximately 13% of the city's land area, illustrates how the stability and certainty of these designated lands attracts new non-residential development.

As of December 31, 2023, 25% of these projects had been built, amounting to 859,345 m<sup>2</sup> of new non-residential floor space (21% of all non-residential GFA in Employment Areas) across 73 development projects. Another 1,997,444 m<sup>2</sup> of non-residential GFA (49% of total) in 94 projects (33% of total) is currently Active, meaning that the project has received at least one Planning approval. A further 120 projects (42% of total) with 1,215,288 m<sup>2</sup> of non-residential GFA (30% of total) is Under Review.

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

Employment Areas continue to provide an attractive location for development projects, particularly those including industrial space, and are critical to the City's diverse economic structure and vitality. The current Pipeline contains approximately 2,029,801 m<sup>2</sup> of proposed industrial GFA across the city, about 86%, or 1,736,850 m<sup>2</sup>, of which is in Employment Areas (see Table 19). The majority of proposed industrial GFA in Employment Areas is located within Core Employment Areas (71%), while 29% is proposed in General Employment Areas, in alignment with Official Plan policies.

In Core Employment Areas, almost two-thirds of the proposed GFA is Industrial (62%), totaling 1,233,877m<sup>2</sup> (see Tables 18 and 19 on pages 34 and 35). The remaining proposed GFA is mostly split between Institutional and Office uses. Built and Approved Industrial GFA represents about 44% or 882,952 m<sup>2</sup> of all GFA in Core Employment Areas over the last five years. An additional 350,925 m<sup>2</sup> of proposed Industrial GFA in Core Employment Areas is Under Review.

## Core Employment Areas and General Employment Areas

**Core Employment Areas** are, for the most part, geographically located within the interior of Employment Areas. Uses that would attract the public into the interior of employment related lands and possibly disrupt industrial operations are not generally permitted in the Core Employment Areas. This separation prioritizes goods movement within Core Employment Areas and provides operating businesses certainty as to their surrounding uses. Uses permitted in Core Employment Areas are all types of manufacturing, processing, warehousing, wholesaling, distribution, storage, transportation facilities, vehicle repair and services, offices, research and development facilities, utilities, waste management systems, industrial trade schools, media, information and technology facilities, and vertical agriculture.

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

**Table 18: Proposed Development in Employment Areas by Status**

|                                 | Projects     |               | Proposed Non-Residential Gross Floor Area |               |                |
|---------------------------------|--------------|---------------|---|---------------|----------------|
|                                 | Number       | Percent       | Number                                    | Percent       |                |
| <b>City of Toronto</b>          | <b>1,701</b> |               | <b>13,958,669</b>                         | <b>100.0%</b> |                |
| <b>Total Employment Areas</b>   | <b>287</b>   | <b>100.0%</b> | <b>4,072,077</b>                          | <b>29.2%</b>  | <b>100.0 %</b> |
| <b>Under Review</b>             | 120          | 41.8%         | 1,215,288                                 |               | 29.8%          |
| <b>Active</b>                   | 94           | 32.8%         | 1,997,444                                 |               | 49.1%          |
| <b>Built</b>                    | 73           | 25.4%         | 859,345                                   |               | 21.1%          |
|                                 |              |               |   |               |                |
| <b>Total Employment Areas</b>   | <b>287</b>   | <b>100.0%</b> | <b>4,072,077</b>                          | <b>100.0%</b> |                |
| <b>Core Employment Areas</b>    | <b>168</b>   | <b>58.5%</b>  | <b>1,994,895</b>                          | <b>49.0%</b>  | <b>100.0%</b>  |
| <b>Under Review</b>             | 70           | 41.7%         | 628,726                                   |               | 31.5%          |
| <b>Active</b>                   | 49           | 29.2%         | 649,326                                   |               | 32.5%          |
| <b>Built</b>                    | 49           | 29.2%         | 716,843                                   |               | 35.9%          |
| <b>General Employment Areas</b> | <b>119</b>   | <b>41.5%</b>  | <b>2,077,182</b>                          | <b>51.0%</b>  | <b>100.0%</b>  |
| <b>Under Review</b>             | 50           | 42.0%         | 586,562                                   |               | 28.2%          |
| <b>Active</b>                   | 45           | 37.8%         | 1,348,118                                 |               | 64.9%          |
| <b>Built</b>                    | 24           | 20.2%         | 142,502                                   |               | 6.9%           |

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

Development projects with activity between January 1, 2019 and December 31, 2023. 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 2 and 12 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.



## Areas of Employment

Through Bill 97 (*Helping Homebuyers, Protecting Tenants Act*, 2023) the Province made changes to the *Planning Act* to narrow the definition of Areas of Employment (AOEs) as areas of land designated in an official plan for clusters of business and economic uses related to manufacturing, research and development, warehousing and good movement. The revised definition expressly excludes institutional uses and commercial uses, including retail and offices uses that are not associated with manufacturing, research and development, warehousing and goods movement. In response to this change the City utilized a transition provision in the new *Planning Act*, as set out in Bill 97. Official Plan Amendment (OPA) 668, considered and adopted by City Council on July 20, 2023, introduced new policies to section

4.6 of the Official Plan to authorize lawfully established commercial uses and institutional uses to continue in the City's Core Employment Areas and General Employment Areas. Protecting areas with existing commercial uses and institutional uses supports the City's economic diversity and protects the dispersal of employment opportunities across the city.

In Toronto, there are 23 AOEs which represent geographic clusters of lands designated as either Core Employment Area or General Employment Area in the Official Plan, as well as some areas with Regeneration or Utility uses, and comprise specific precincts throughout the city such as the Port Lands and the Dufferin Employment District (see Appendix Map A.1 on page 53).

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

**Table 19: Proposed Industrial Gross Floor Area in Employment Areas**

|                           | Under Review   | Active         | Built          | Total in Pipeline | % of Total    | % in Employment Areas |
|---------------------------|----------------|----------------|----------------|-------------------|---------------|-----------------------|
| <b>City of Toronto</b>    | <b>782,808</b> | <b>549,489</b> | <b>697,503</b> | <b>2,029,800</b>  | <b>100.0%</b> |                       |
| <b>Employment Areas</b>   | 592,326        | 515,928        | 628,596        | 1,736,850         | 85.6%         | 100.0%                |
| <b>Core Employment</b>    | 350,925        | 304,145        | 578,807        | 1,233,877         | 60.8%         | 71.0%                 |
| <b>General Employment</b> | 241,401        | 211,783        | 49,789         | 502,973           | 24.8%         | 29.0%                 |

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

Development projects with activity between January 1, 2019 and December 31, 2023. 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 2 and 12 because 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.

## Secondary Plan Areas

Secondary Plans are instrumental in managing the city's growth. They guide development and investment within a local context for areas where physical change is expected or desired. Secondary Plans manage the creation of new neighbourhoods and employment areas while ensuring adequate public infrastructure and environmental protection.

There are currently 43 Secondary Plan areas which are approved and in-force. In addition, there are six Secondary Plans that have been adopted or endorsed by City Council but have not yet received approval from the Provincial government or that are under appeal (see Appendix Table A.10 on page 62 for a complete list of proposed development within Secondary Plan areas). Secondary Plans that are before the Minister

for approval or under appeal may be subject to change, pending decisions of the Minister or the Ontario Land Tribunal. The City's Secondary Plans cover a wide range of geographies and are comprised of a mix of land use designations where development may be encouraged. Some Secondary Plans also overlap with areas covered by other Official Plan policies, such as the Downtown and the Central Waterfront, the Centres, and the Avenues. Map 9 (on page 37) displays the areas of the Secondary Plans and the locations of development projects within each.

As shown in Table 20, there are 1,095 projects proposed in Secondary Plan Areas, or 47% of total projects in the Pipeline. These projects propose a total of 545,608 residential units and 9,548,786 m<sup>2</sup> of non-residential GFA. This represents 69% of both the

total proposed residential units and non-residential GFA in the city. There are more Active projects (442) than Under Review projects (376) in the Secondary Plan areas, and there are even fewer Built projects (277).

Some areas covered by a Secondary Plan are outside of Downtown, the Centres, the Avenues, and other Mixed Use Areas. There are 83,917 residential units and 2,921,373 m<sup>2</sup> of non-residential GFA proposed in Secondary Plans in All Other Areas of the city. If this development were added to the development proposed in Downtown, the Centres, Avenues, and other Mixed Use Areas, then 90% of the residential units and 76% of the non-residential GFA in the Pipeline are proposed in a growth management area.

**Table 20: Proposed Development in Secondary Plan Areas by Status**

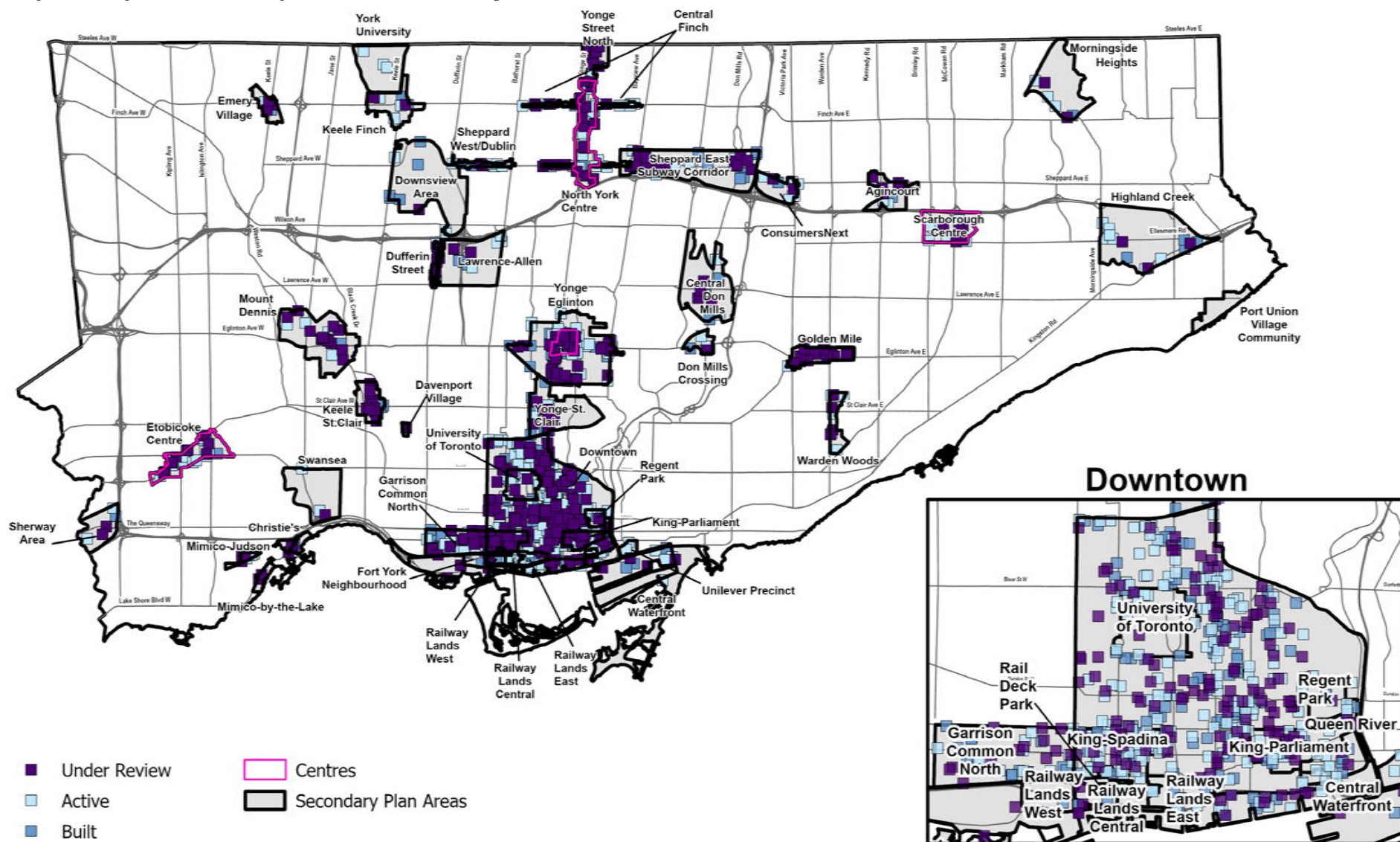
|                             | Projects     |               | Proposed Residential Units |               | Proposed Non-Residential Gross Floor Area |               |
|-----------------------------|--------------|---------------|----------------------------|---------------|---|---------------|
|                             | Number       | Percent       | Number                     | Percent       | Number                                    | Percent       |
| <b>City of Toronto</b>      | <b>2,344</b> | <b>100.0%</b> | <b>800,889</b>             | <b>100.0%</b> | <b>13,958,669</b>                         | <b>100.0%</b> |
| <b>Secondary Plan Areas</b> | <b>1,095</b> | <b>46.7%</b>  | <b>545,608</b>             | <b>68.1%</b>  | <b>9,548,786</b>                          | <b>68.4%</b>  |
| <b>Under Review</b>         | 376          | 34.3%         | 292,016                    | 53.5%         | 3,430,537                                 | 35.9%         |
| <b>Active</b>               | 442          | 40.4%         | 175,919                    | 32.2%         | 4,362,329                                 | 45.7%         |
| <b>Built</b>                | 277          | 25.3%         | 77,673                     | 14.2%         | 1,755,920                                 | 18.4%         |

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

Development projects with activity between January 1, 2019 and December 31, 2023. Built projects are those which became ready for occupancy and/or were completed. Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or those which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal. Gross floor area values are expressed in square metres.

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

## Map 9: Proposed Development in Secondary Plan Areas



Source: Land Use Information System II

Development projects with activity between January 1, 2019 and December 31, 2023. Built projects are those which became ready for occupancy and/or were completed. Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal.

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## Profiled Secondary Plan Areas

The **Downsview Area Secondary Plan** is guiding significant planned growth facilitated by the redevelopment of the former Downsview Airport. In total, 51,492 residential units and 1,205,208 m<sup>2</sup> non-residential GFA is proposed for the Downsview Secondary Plan area, which was recently approved by City Council.

The **Golden Mile Secondary Plan**, adopted by Council but currently under appeal, will manage the integration of residential uses into an area of the city that is currently characterized by primarily low-density non-residential uses. This transformation is being driven by the forthcoming opening of the Eglinton Crosstown LRT which will significantly improve transit access. The Golden Mile Secondary Plan contains 32,932 residential units and 197,902 m<sup>2</sup> of non-residential GFA within 16 development projects.

Closer to Downtown, the **Unilever Precinct Secondary Plan** provides a development framework for the former industrial lands. The two Pipeline projects within this Secondary Plan propose a mix of residential commercial, institutional and industrial uses. Together they represent 4,300 new residential units and 933,555 m<sup>2</sup> of non-residential GFA, demonstrating a continued trend toward larger projects in the Pipeline as well as the revitalization of the waterfront area.

The **Mount Dennis Secondary Plan**, adopted by Council but currently under appeal, seeks to manage growth and change, while preserving the key attributes of the community valued by local residents. The Mount Dennis area is anticipated to experience significant intensification in the coming years with the eventual opening of the Eglinton Crosstown LRT and Mount Dennis Station. While the area has historically seen limited development activity, multiple recent proposals are now under review in this geography.

## Major Transit Station Areas

Major Transit Station Areas (MTSAs) are defined in the Growth Plan (2020) as areas within an approximately 500 to 800 metre radius of a transit station (representing a 10-minute walk). The primary intent of MTSAs is to prioritize growth where transit and other infrastructure currently exists or is planned by prescribing minimum density targets.

Protected Major Transit Station Areas (PMTSAs) are a subset of MTSAs. The introduction of PMTSAs enables the implementation of Inclusionary Zoning (IZ) as a tool to secure affordable housing where market conditions can support it.

At its meeting on July 19 – 22, 2022, City Council adopted the recommended MTSA and PMTSA Official Plan Amendments (OPA 540, OPA 544, OPA 570 and OPA 575) for 115 MTSAs, of which 86 are PMTSAs.<sup>18</sup> Following the approval of the City's MTSA and PMTSA delineations by the Ministry of Municipal Housing and Affairs, the City will be able to apply IZ requirements to new development projects located in PMTSAs that meet a minimum development size.

Future Development Pipeline bulletins will monitor and report on development activity occurring within MTSAs and PMTSAs boundaries.



# The City of Toronto and the Provincial Growth Plan

## Citywide Growth Plan Forecast

There are a number of forecasts and targets for Toronto's growth, and the Development Pipeline can be used along with other data to assess the City's progress towards accommodating the growth.

*A Place to Grow: Growth Plan for the Greater Golden Horseshoe* ("the Growth Plan") manages growth and development throughout the region that stretches around Lake Ontario from Niagara Falls to Peterborough, with Toronto at its centre. On August 28th, 2020, the Province released an amended Growth Plan, eliminating the 2031 and 2041 forecast years, replacing them with forecasts for 2051.

### Population Forecast

The underlying technical forecast study to Amendment 1 was prepared by Hemson Consulting Ltd. and released in August 2020 in response to uncertain growth trends brought on by the COVID-19 pandemic.<sup>19</sup> The 2051 forecasts in the amended Growth Plan correspond to the Reference Scenario in the 2020 technical forecast study. That Scenario has a 2016 population of 2,819,000 and a 2021 forecast population of 3,034,000. The proposed population forecasts were revised with a reduction of approximately 13% growth over the 2016 – 2021 period and a corresponding decline of 15% in GGH employment in 2020 Q2, with about three-quarters of the job losses anticipated to be recovered by 2021 Census Day.

Through the Census, Statistics Canada attempts to count every person. However, some people are missed, and a few are counted more than once. Statistics Canada undertakes follow-up studies to estimate the net undercoverage rate of the Census. Statistics Canada's estimate of the Toronto's population as of July 1st, 2021 is 2,917,666, as estimated in May 2024, which is about 4% or about 116,300 persons below the revised forecast.

While the City was on track with the forecasts supporting the Growth Plan as amended, disruptions caused by the COVID-19 pandemic have impacted the short-term growth in population, most notably as a result of more limited international migration which is a large driver of the City's population growth. Nevertheless, Hemson Consulting Ltd. anticipated that the fundamental growth patterns of the region would reassert themselves in three years' time. According to Statistics Canada, Toronto's estimated population as of July 1st, 2023 is 3,110,984. This is population growth of almost 200,000 people over the two year period from 2021.

## Employment Forecast

The Growth Plan, as amended on August 28th, 2020, contains a new forecast horizon of 2051 and a forecast of 1,980,000 jobs by that year. The Reference Scenario in the technical forecast study supporting the amended Schedule 3 forecast suggests an average annual growth rate of 10,600 jobs per annum from 2016 to 2051.

According to the results of the 2023 Toronto Employment Survey,<sup>20</sup> the City saw an increase in employment from 2022 of 50,690 jobs or 3%,<sup>21</sup> following growth of 2% in 2022,<sup>22</sup> virtually no growth in 2021, and a decline in employment of 8% or 119,890 jobs between 2019 and 2020.<sup>23,24</sup> The city has now regained about 7 in 10 jobs lost during the first year of the COVID-19 pandemic. This supports the assumptions used in the Provincial Growth Plan forecasts, as described in the 2020 technical report, that anticipated that overall regional growth would return to pre-pandemic expectations within three years.<sup>25</sup>

According to the results of the Toronto Employment Survey, over the "pre-pandemic" ten-year period 2009 to 2019, the City's employment grew by 27,661 jobs per annum. This is 2.6 times the rate of growth anticipated by the forecasts supporting the Growth Plan. Over the ten-year period 2013 to 2023, Toronto's employment grew by 17,144 jobs per annum, or 1.6 times the rate of growth anticipated by the Growth Plan forecasts. To date, the City is still growing faster than forecast and remains on track to achieve the Growth Plan forecast before 2051.



## Housing Forecast

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

To accommodate the additional households, more housing must be built. To realize this growth, some existing housing may need to be demolished. Based on an analysis of Demolition Permits over the 16-year period of 2005-2020, the overall average annual demolition rate versus housing units completed over the same period as reported by CMHC was 8.9% (see page 12). The demolition rate can be applied to the potential housing supply to estimate the net supply (see Table 21).

Just twelve years into the forty-year forecast period, Toronto has built or has had proposed more than enough potential housing less estimated demolitions to accommodate the forecasted growth to 2051. The total potential housing supply of units built, approved and still under review since 2011 is over 900,000 residential units.

CMHC reports that 215,206 units were completed between May 2011 and December 31, 2023 for a net total of 196,053 units. The Development Pipeline contains 258,397 units in projects with at least their first Planning approval but not yet built. If realized, the estimated new supply after accounting for demolitions would be 235,400 units. Together this is 87% of the net units required to accommodate the forecasted growth over forty years. A further 436,421 units are in development projects still under

review for an estimated added net new supply of 397,580 units or a further 80% of the forecasted growth. Together this represents 167% of the units required to accommodate the forecasted household growth to 2051 (see Figure 4 on page 41).

Not all submitted proposals are approved, and not all approved projects are built. Further, the City does not have any influence on the timing of when an applicant advances a Planning approval by submitting Building Permit applications or advancing construction. However, given these trends, there is more than enough supply in the Pipeline to accommodate the forecasted growth, and Toronto is well on its way to housing the population forecasted by A Place to Grow as amended.

**Table 21: Growth Plan Forecast**

|  |                 | Potential Supply<br>(Units) | %             | Potential Supply<br>Less Estimated<br>Demolitions | %             |
|--|-----------------|-----------------------------|---------------|---|---------------|
| <b>Hemson Forecast</b>                 | 2011 - 2051     | 495,800                     | 100.0%        | 495,800   | 100.0%        |
| <b>CMHC Completions</b>                | May 2011 - 2023 | 215,206                     | 43.4%         | 196,053   | 39.5%         |
| <b>Active Units</b>                    | 2019 - 2023     | 258,397                     | 52.1%         | 235,400   | 47.5%         |
| <b>Under Review Units</b>              | 2019 - 2023     | 436,421                     | 88.0%         | 397,580   | 80.2%         |
| <b>Total Units</b>                     |                 | <b>910,024</b>              | <b>183.5%</b> | <b>829,032</b>                                    | <b>167.2%</b> |
| <b>Additional Potential/ Shortfall</b> |                 | 414,224                     | 83.5%         | 333,232   | 67.2%         |

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

Based on development projects with activity between January 1, 2019 and December 31, 2023 less estimated demolitions using a demolition rate of 8.9% based on Demolition Permits issued 2005-2020 versus CMHC Completions over the same period. Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or those which are under construction, but are not yet built. Projects Under Review are those which have not yet been approved or refused and those which are under appeal.

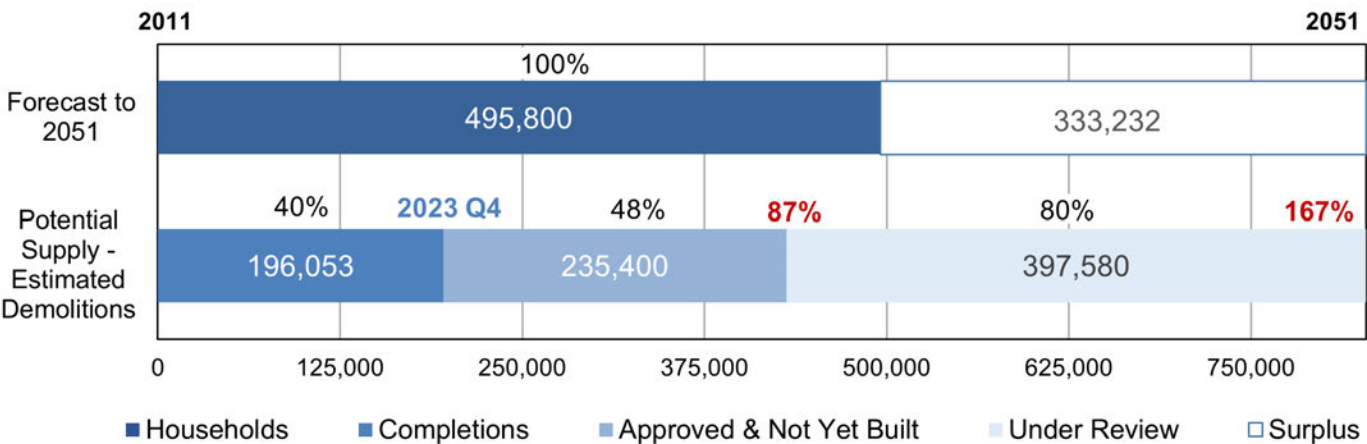
Potential Population

There are 235,400 net units which are approved but not yet built in the Development Pipeline after accounting for estimated demolitions to realize them. If these units were completed and occupied at the average number of persons per household of units built in the twenty years between 2001 and 2021, the potential population in these units could be about 487,000 people.

In addition to Statistics Canada’s 2021 population estimate for the city of 2,917,666, this could bring the city’s population to 3.4 million or 93.3% of the forecasted population at 2051. If the 397,580 net new units which were still Under Review as of December 31, 2023 were also approved, built and similarly occupied (already having accounted for estimated demolitions), the potential population in these additional units could be about 823,000 people.

In total, the Development Pipeline could represent a potential population of 1,310,000 people. This would be the equivalent of growing Toronto’s population by over 44%. Added to the 2021 population, the Pipeline would contribute to a city population of about 4.23 million or 116% of the 2051 population forecast of 3.65 million contained in the Provincial Growth Plan as amended.

Figure 4: Growth Plan Forecast to 2051



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

Based on development projects with activity between January 1, 2019 and December 31, 2023 less estimated demolitions using a demolition rate of 8.9% based on Demolition Permits issued 2005-2020 versus CMHC Completions over the same period. Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or those which are under construction, but are not yet built. Projects Under Review are those which have not yet been approved or refused and those which are under appeal.

### ***Density of Jobs and People in Growth Areas***

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

Table A.12 in the Appendix shows the density of people and jobs per hectare for Downtown and each Centre between 2006 and 2021, and for the city overall. Since 2006, each of these areas has steadily become denser. North York Centre and Yonge-Eglinton Centre have achieved the 400 people and jobs per hectare target, as early as 2006 in the case of Yonge-Eglinton Centre. If the overall density trends continue, it is likely that Downtown will exceed the UGC density target well before 2031. The review of the Scarborough Centre Secondary Plan framework was concluded in June 2023. If built out as envisioned, it would result in a combined density of 509 people and jobs per hectare, well above the required minimum.<sup>26</sup> Further, two of the city's largest proposed projects are located in Scarborough Centre which indicates a positive outlook for the area.

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

Bill 23, the *More Homes Built Faster Act* 2022, was given Royal Assent on November 28th, 2022, and entails extensive changes to the policy-led planning and land development system under which municipalities in Ontario operate. The Province's stated goal for the Bill is to facilitate the construction of 1.5 million new homes, of which 285,000 homes (or 19%) are targeted in Toronto by 2031.<sup>27</sup> If the average annual rate of 17,741 units built between 2019 and 2023 continued to 2031, a total of about 199,000 units would be built, with about 142,000 of that forthcoming. The Housing Target represents a further increase of 47% or 91,000 homes.

CMHC reports that 56,838 units were completed between 2021 and 2023 for a net total of 51,779 units. This amounts to 18% of the target. Considering only development projects that had development activity between January 1, 2021 and

December 31, 2023 to reflect the time-frame of the Housing Target, there are 188,919 units in projects with at least their first Planning approval but not yet built. If realized, the estimated new supply after accounting for demolitions would be 172,105 units. This is 60% of the net units required to accommodate the targeted growth over the ten-year time period. A further 322,935 units are in development projects still under review for an estimated added net new supply of 294,194 units or a further 103% of the targeted growth. Altogether, this represents 182% of the units required to accommodate the housing target set for Toronto to 2031 (see Table 22 and Figure 5 on page 44). Not all submitted proposals are approved, and not all approved projects are built, nor may be built in the given time frame.

As discussed earlier in this bulletin, about 46% of units with their first Planning approval on an Official

Plan Amendment or Zoning By-law Amendment application have been built over the five-year period between 2019 and 2023, and about 82% of units with a Planning approval on a Site Plan Control application have been built. If a similar conservative proportion of 46% of the current Pipeline with development activity between January 1, 2021 and December 31, 2023 was built by 2031, about 235,500 units would be constructed. Allowing for an estimated demolition rate of 8.9% to realize the potential housing, the current Pipeline could yield 214,500 net new units, which is about three-quarters the Housing Target. Meanwhile, additional proposals will be received. There is potential within the Development Pipeline to meet the new targets as set out by the *More Homes Built Faster Act*. Achieving the target will depend on the timing and delivery of these units, as well as the continued submissions of new development proposals.

**Table 22: 2031 Municipal Housing Target**

|  |             | Potential Supply<br>(Units) | %             | Potential Supply<br>Less Estimated<br>Demolitions | %             |
|--|-------------|-----------------------------|---------------|---|---------------|
| <b>Bill 23 Housing Pledge</b>          | 2021 - 2031 | 285,000                     | 100.0%        | 285,000   | 100.0%        |
| <b>CMHC Completions</b>                | 2021 - 2023 | 59,380                      | 20.8%         | 54,095  | 19.0%         |
| <b>Active Units</b>                    | 2021 - 2023 | 188,919                     | 66.3%         | 172,105   | 60.4%         |
| <b>Under Review Units</b>              | 2021 - 2023 | 322,935                     | 113.3%        | 294,194   | 103.2%        |
| <b>Total Units</b>                     |             | <b>571,234</b>              | <b>200.4%</b> | <b>520,394</b>                                    | <b>182.6%</b> |
| <b>Additional Potential/ Shortfall</b> |             | 286,234                     | 100.4%        | 235,394   | 82.6%         |

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

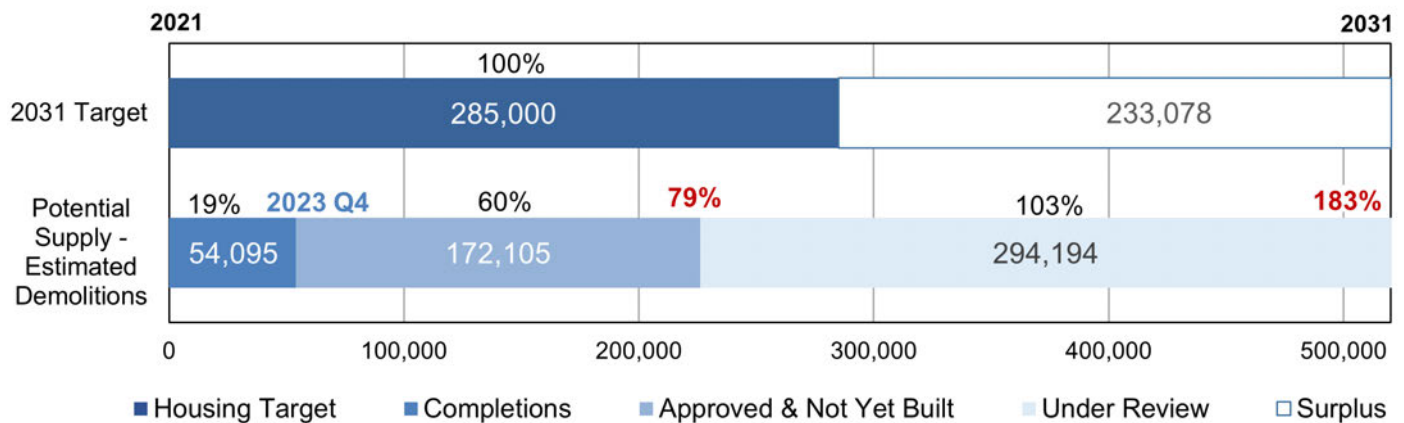
Based on development projects with activity between January 1, 2021 and December 31, 2023 less estimated demolitions using a demolition rate of 8.9% based on Demolition Permits issued 2005-2020 versus CMHC Completions over the same period. Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or those which are under construction, but are not yet built. Projects Under Review are those which have not yet been approved or refused and those which are under appeal.

Note: CMHC Completions include both CMHC completions from 2021 to 2023 as reported in Appendix Table A.3, as well as Non-Residential-to-Residential Conversions and Residential-to-Residential Conversions.

### City of Toronto's 2023 Municipal Housing Target

The Building Faster Fund was created to reward municipalities that are on track to meet their housing targets. Performance is evaluated by comparing municipalities' housing starts in a given calendar year against the annual target, with municipalities meeting at least 80% of the target eligible for funding. The City of Toronto's annual Municipal Housing Target for 2023 was 20,900 which it exceeded by 50%. CMHC reports that there were 31,310 housing starts in Toronto in 2023.

Figure 5: Municipal Housing Target to 2031



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

Based on development projects with activity between January 1, 2021 and December 31, 2023 less estimated demolitions using a demolition rate of 8.9% based on Demolition Permits issued 2005-2020 versus CMHC Completions over the same period. Built projects are those which became ready for occupancy and/or were completed. Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or those which are under construction, but are not yet built. Projects under review are those which have not yet been approved or refused and those which are under appeal.



# Initiatives to Increase Housing Supply

## Non-City Led Initiatives

Nearly 13% of projects in the Pipeline are related to the initiatives of Transit Oriented Communities (TOCs) and the redevelopment of existing mall sites. The following sections will expand on the locations and residential impact of TOCs and mall redevelopments across the city, highlighting their importance as considerable opportunities for city-building. These large-scale projects will contribute significantly to increasing housing supply in proximity to transit in coming years, helping to shape the city's built form and population densities.

## Mall Redevelopment

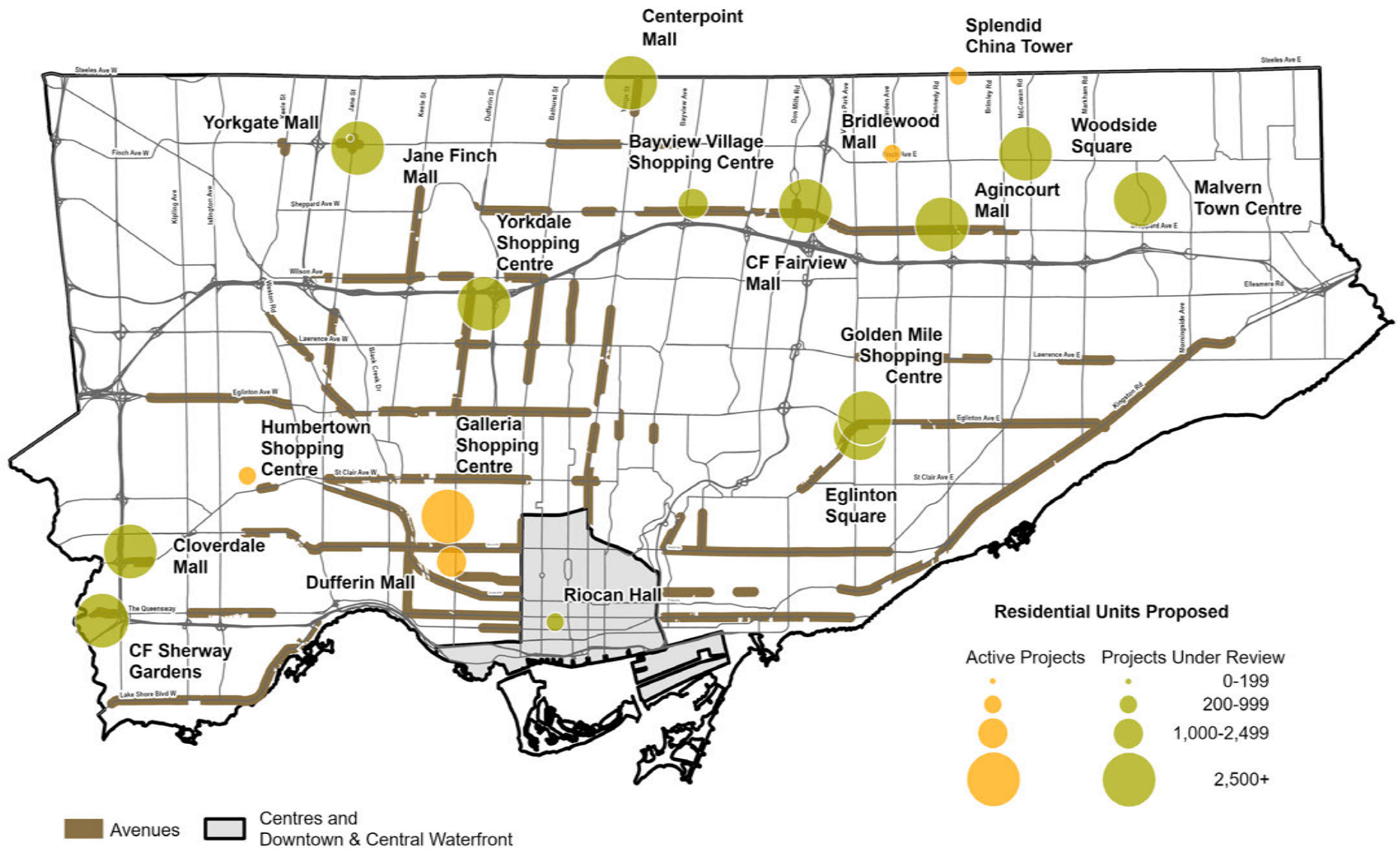
Across Toronto and in nearby municipalities, a noticeable trend of mall redevelopment is taking place. As retail landscapes evolve, owners of existing mall sites are seeking to reimagine these spaces as large mixed-use residential communities — introducing a broader mix of uses, including for new residential and additional commercial space.

These large-scale redevelopments present an opportunity to enhance their surrounding communities through the creation of connected, safe and comfortable public realm networks and community services and facility investments. Many applications propose to replace large surface-grade parking lots or aging malls with residential towers from which residents could benefit from existing amenities, infrastructure, and transit connectivity. As the city continues to grow, these sites will play a significant role in increasing housing supply over the next few decades.

The redevelopment or intensification of malls will transition these large sites from predominantly daytime commercial destinations into full time, active multi-use nodes, creating enormous potential for increased housing density in these well-connected and recognizable spaces.

In 2021, City Planning published the **Mall Redevelopment Guide**,<sup>28</sup> which contains key principles and design recommendations that support the full integration with surrounding communities. The Guide encourages the inclusion of mixed-income housing opportunities and the retention of the key service and commercial functions that existing malls play in their communities. Toronto's malls offer a unique opportunity to deliver on city building objectives, often in conjunction with higher order transit.

# Map 10: Proposed Mall Redevelopments



Source: Land Use Information System II

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

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

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

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## Mall Redevelopment Tracking

City Planning has been tracking city-wide mall redevelopment data annually, with the most recent project list generated as of Q4 2023.

There are 20 active development projects for mall redevelopments across the city, containing about 74,745 residential units and 728,715 m<sup>2</sup> of non-residential GFA (see Table 23). Of this total, 11 sites propose partial or full

demolitions of the existing malls, retaining 32,608 m<sup>2</sup> of the existing 313,330 m<sup>2</sup> non-residential GFA and proposing 295,209 m<sup>2</sup> of new non-residential GFA. This equates to a 94% replacement of existing non-residential GFA within partial or full demolition proposals. The remaining nine sites seek to retain the mall footprint and integrate additional mixed and single use residential buildings into the existing built form.

Each application proposes the introduction of significant density typically through multiple towers, creating new urban concentrations and intensifying existing tall building nodes across the city.

**Table 23: Proposed Projects, Residential Units, and Non-Residential GFA in Mall Redevelopment Projects**

|                         | Proposed Residential Units | % of Total    | Proposed Non-Residential GFA | % of Total    | Retained Non-Residential GFA | Total Proposed GFA |
|-------------------------|----------------------------|---------------|------------------------------|---------------|------------------------------|--------------------|
| <b>Total</b>            | <b>74,745</b>              | <b>100.0%</b> | <b>728,715</b>               | <b>100.0%</b> | <b>774,651</b>               | <b>5,913,148</b>   |
| <b>Active</b>           | <b>7,133</b>               | <b>9.5%</b>   | <b>146,490</b>               | <b>20.1%</b>  | <b>39,930</b>                | <b>627,463</b>     |
| Galleria                | 3,600                      | 4.8%          | 29,050                       | 4.0%          | -                            | 242,800            |
| Dufferin Mall           | 1,200                      | 1.6%          | 13,353                       | 1.8%          | -                            | 101,235            |
| Bridlewood              | 975                        | 1.3%          | 51,250                       | 7.0%          | 29,730                       | 172,240            |
| Splendid China Tower    | 793                        | 1.1%          | 33,560                       | 4.6%          | 10,200                       | 88,273             |
| Humbertown              | 565                        | 0.8%          | 19,277                       | 2.6%          | -                            | 22,915             |
| <b>Under Review</b>     | <b>66,586</b>              | <b>89.1%</b>  | <b>582,225</b>               | <b>79.9%</b>  | <b>734,721</b>               | <b>5,285,685</b>   |
| Scarborough Town Centre | 15,500                     | 20.7%         | 67,400                       | 9.2%          | 114,056                      | 1,330,456          |
| Centerpoint             | 8,324                      | 11.1%         | 29,514                       | 4.1%          | -                            | 669,120            |
| Malvern Town Centre     | 5,755                      | 7.7%          | 18,560                       | 2.5%          | -                            | 62,387             |
| Cloverdale              | 5,269                      | 7.0%          | 41,159                       | 5.6%          | -                            | 409,506            |
| Yorkdale                | 5,126                      | 6.9%          | 99,400                       | 13.6%         | 275,335                      | 446,543            |
| Jane & Finch            | 4,600                      | 6.2%          | 14,964                       | 2.1%          | -                            | 340,348            |
| Fairview                | 4,500                      | 6.0%          | 40,000                       | 5.5%          | 94,110                       | 97,209             |
| Agincourt               | 4,372                      | 5.8%          | 36,695                       | 5.0%          | -                            | 371,326            |
| Eglinton Square         | 3,618                      | 4.8%          | 2,809                        | 0.4%          | -                            | 170,768            |
| Golden Mile             | 3,597                      | 4.8%          | 37,845                       | 5.2%          | -                            | 325,169            |
| Woodside Sq             | 2,556                      | 3.4%          | 13,841                       | 1.9%          | 42,989                       | 245,892            |
| Sherway                 | 2,382                      | 3.2%          | 114,702                      | 15.7%         | 155,370                      | 569,362            |
| Bayview Village         | 1,026                      | 0.0%          | 34,898                       | 4.8%          | 32,608                       | 149,335            |
| RioCan Hall             | 693                        | 0.9%          | 30,438                       | 4.2%          | -                            | 80,334             |
| Yorkgate Mall           | 294                        | 0.4%          | -                            | 0.0%          | 20,253                       | 17,930             |

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

Development projects with activity between January 1, 2019 and December 31, 2023. 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.

## Transit Oriented Communities

Active and Under Review mall redevelopments represent nearly 10% of proposed residential units within the Pipeline (see Table 24), adding weight to the importance of these sites as major sources of housing supply and helping to reshape the landscape of the city in coming years. Mall sites which are currently under review contain a greater number of residential units than in projects under review in the Downtown and Central Waterfront Area, comprising 16% of the Pipeline's Under Review applications. Most of these sites are located north of Eglinton, which will create large residential towers in traditionally suburban areas, adding density and amenities to surrounding communities. Together with Transit Oriented Communities, mall redevelopments will prove crucial in increasing housing supply in transit-connected sites across the city.

The Transit Oriented Communities (TOCs) program is a provincially led initiative involving Infrastructure Ontario, Metrolinx and private development partners to deliver mixed-use developments that are integrated with major transit stations.<sup>29</sup> The City of Toronto is a critical partner in the successful delivery of TOCs. TOCs in Toronto are proposed around future Ontario Line and Scarborough Subway Extension stations, future Smart Track stations, as well as existing GO stations.<sup>30</sup> The shared objectives of the program are to create complete and accessible communities, and to increase housing supply near higher order transit.<sup>31</sup> Projects within TOCs exist in various stages of development; however, the Development Pipeline only captures projects where a Planning application has been submitted to the City of Toronto.

This analysis shows that significant development has already been occurring within the TOC areas. This demonstrates the positive outcomes resulting from coordinated investments in transportation infrastructure and land use planning, reflected in development activity and intensification.

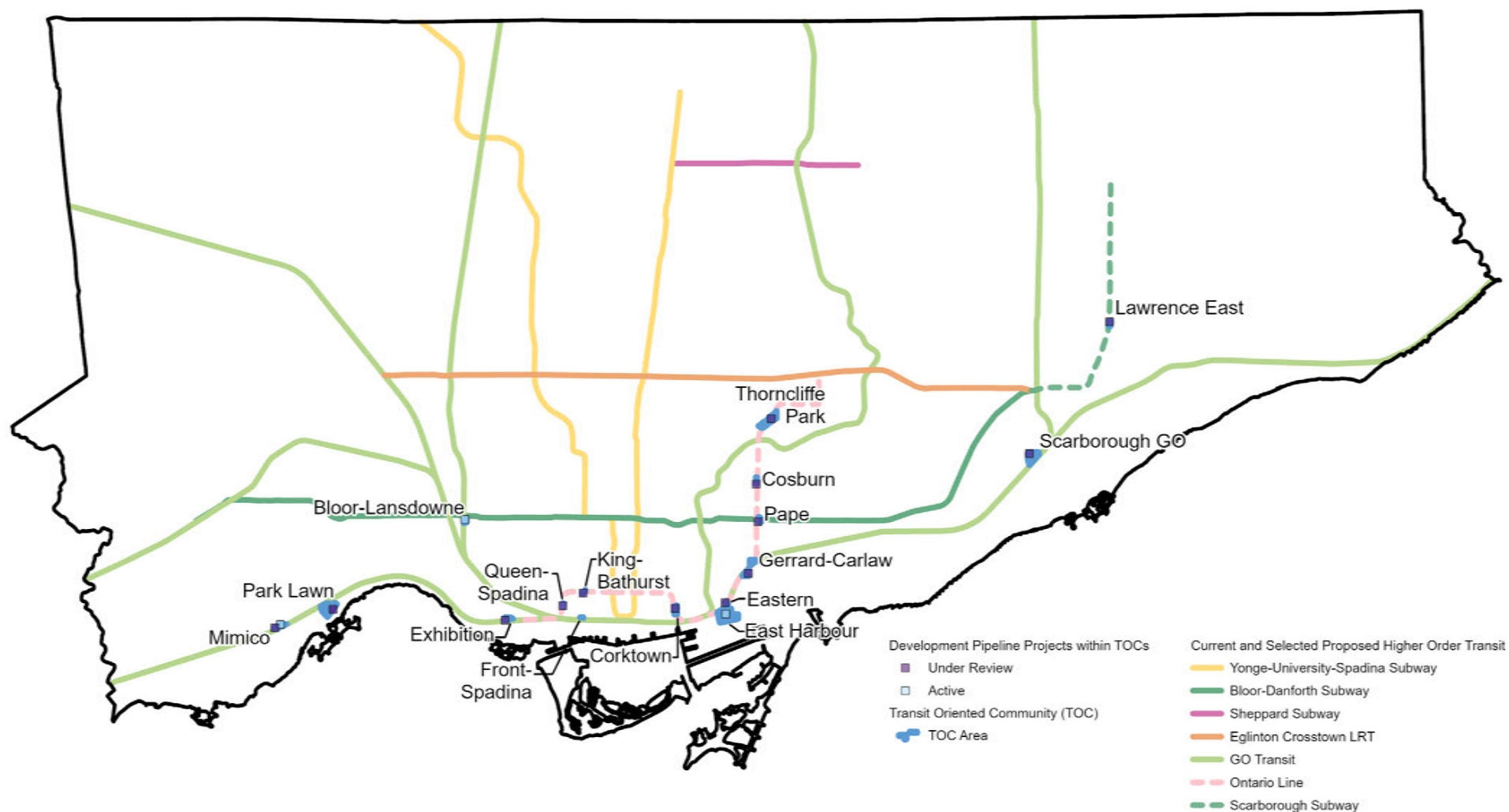
**Table 24: Mall Redevelopment Projects by Status**

|                        | Projects  |               | Proposed Residential Units |               |                     | Proposed Non-Residential Gross Floor Area |               |
|------------------------|-----------|---------------|----------------------------|---------------|---------------------|---|---------------|
|                        | Number    | % of Total    | Number                     | % of Total    | % of Total Pipeline | Number                                    | % of Total    |
| <b>City of Toronto</b> | <b>20</b> | <b>100.0%</b> | <b>74,745</b>              | <b>100.0%</b> | <b>9.3 %</b>        | <b>728,715</b>                            | <b>100.0%</b> |
| <b>Under Review</b>    | 15        | 75.0%         | 67,612                     | 90.5%         | 8.4 %               | 582,225                                   | 79.9%         |
| <b>Active</b>          | 5         | 25.0%         | 7,133                      | 9.5%          | 0.9 %               | 146,490                                   | 20.1%         |
| <b>Built</b>           | -         | -             | -                          | -             | -                   | -   | -             |

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

Development projects with activity between January 1, 2019 and December 31, 2023. 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.

## Map 11: Transit Oriented Communities



Source: Land Use Information System II

Development projects with activity between January 1, 2019 and December 31, 2023.

The boundaries of each Transit Oriented Community were sourced from published information on Ontario's Transit-Oriented Communities webpage<sup>27</sup> and the City of Toronto's Transit-Oriented Community webpage.<sup>28</sup>

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There are 16 TOCs within the City of Toronto, of which 15 have at least one Development Pipeline project associated with them, and three TOCs have more than one project within them. Only the Front-Spadina TOC does not yet have a Planning application submitted within the TOC. In total, there are 18 development projects within TOCs in Toronto which account for approximately 27,700 units and 3.2 million m<sup>2</sup> of GFA, including 1,156,800 m<sup>2</sup> of non-residential GFA (see Table 25). Four of the projects within TOCs are Active (King-Bathurst, Bloor-Lansdowne, Mimico, and East Harbour), meaning that at least one Planning approval has been issued, and the remainder are Under Review.

The Queen-Spadina TOC currently has the least amount of proposed non-residential GFA (887 m<sup>2</sup>) and the TOC with the greatest amount of proposed non-residential GFA is East Harbor (1.2 million m<sup>2</sup>).

Across all TOCs, residential uses account for 64% of the total proposed GFA, while office uses account for 31%, retail uses account for 3%, and industrial, institutional and other uses together account for 2%. The City's *Growing Up Guidelines* recommend a minimum of 25% of proposed residential units to be large units (i.e. two or more bedrooms). In TOCs, 27% of proposed units contain two-bedrooms and 10% contain three

or more bedrooms. In total, 37% of units are considered large units, which exceeds the recommended proportion.

Based on the current trends captured within the Development Pipeline, TOCs have the potential to support complete communities as outlined in the shared objectives of the initiative. Projects submitted thus far include a mix of residential and non-residential uses and include larger units. It is possible that the composition of development may evolve as provincial transit projects and development projects within TOCs continue to progress, and more planning applications are submitted.

**Table 25: Proposed Projects, Residential Units, and Non-Residential GFA in Transit Oriented Communities**

|                                     | Projects  | Proposed Residential Units | Proposed Non-Residential GFA | Total Proposed GFA |
|-------------------------------------|-----------|----------------------------|------------------------------|--------------------|
| <b>Total in TOCs</b>                | <b>18</b> | <b>27,680</b>              | <b>1,156,807</b>             | <b>3,183,423</b>   |
| <b>Ontario Line</b>                 | <b>11</b> | <b>9,768</b>               | <b>993,736</b>               | <b>1,702,531</b>   |
| Corktown                            | 1         | 0                          | 1,058                        | 1,058              |
| Cosburn                             | 1         | 623                        | 2,208                        | 47,550             |
| East Harbour                        | 1         | 4,300                      | 926,000                      | 1,228,000          |
| Eastern                             | 1         | 142                        | 907                          | 12,255             |
| Exhibition                          | 1         | 0                          | 22,472                       | 22,472             |
| Gerrard-Carlaw                      | 1         | 1,313                      | 13,433                       | 113,488            |
| King-Bathurst                       | 2         | 286                        | 1,726                        | 23,277             |
| Pape                                | 1         | 439                        | 2,150                        | 39,492             |
| Queen-Spadina                       | 1         | 0                          | 887                          | 887                |
| Thorncliffe Park                    | 1         | 2,665                      | 22,895                       | 214,052            |
| <b>GO Transit Expansion</b>         | <b>6</b>  | <b>17,138</b>              | <b>155,222</b>               | <b>1,422,411</b>   |
| Bloor-Lansdowne                     | 1         | 799                        | 1,200                        | 60,438             |
| Scarborough GO                      | 1         | 6,619                      | 20,482                       | 510,105            |
| Mimico                              | 2         | 2,078                      | 9,006                        | 143,458            |
| Park Lawn                           | 2         | 7,642                      | 124,534                      | 708,410            |
| <b>Scarborough Subway Expansion</b> | <b>1</b>  | <b>774</b>                 | <b>7,849</b>                 | <b>58,481</b>      |
| Lawrence East                       | 1         | 774                        | 7,849                        | 58,481             |

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

Development projects with activity between January 1, 2019 and December 31, 2023. Gross floor area values are expressed in square metres.

## City-led Housing Related Initiatives

While Toronto has grown rapidly in recent years, the city continues to experience a housing crisis, particularly among lower and moderate-income residents for whom rental and ownership costs have surpassed affordability levels. Despite the approval of nearly 400,000 homes in the last 10 years, and a multitude of initiatives by the City, affordability has worsened over that time.<sup>32</sup> In recognition, the City of Toronto is undertaking a range of actions across the housing spectrum to address growing housing needs, including land use and planning interventions as discussed here.

**The HousingTO 2020-2030 Action Plan** is the City's blueprint for action across the full housing spectrum to address the City's vast and growing housing needs.<sup>33</sup> The HousingTO Plan identifies 13 major strategic actions, with over 100 tactical actions, many of which are already in place, focused on increasing the supply of affordable and supportive homes; protecting existing supply of homes; helping renters, and advancing equity and resilience; and enhancing partnerships and improving accountability and transparency. The HousingTO Plan also outlines a target of creating 65,000 rent-controlled homes, including a minimum of 41,000 affordable rental, 6,500 rent-g geared-to-income homes, and 17,500 rent-controlled market homes.<sup>34</sup>

The HousingTO Plan targets support delivery of the Mayor's **Housing Action Plan 2022-2026**, which focuses on enabling market, non-market (i.e. public, co-operative, and non-profit) and mixed housing production in order to achieve or exceed the provincial housing target of 285,000 new homes by 2031. Key areas of focus include Official Plan policy and regulatory components to increase zoning permissions throughout the city; advancing approvals for Housing Now, Modular Housing and Rapid Housing sites; a training and trades strategy to addressing construction market capacity; leveraging public land to increase the supply of housing; and preserving the existing rental stock.<sup>35</sup>

On May 10, 2023, City Council adopted *A Housing Pledge for the City of Toronto*, affirming its commitment to achieving the City of Toronto's 2031 Housing Target.<sup>36</sup>

**Bill 109**, the *More Homes for Everyone Act*, 2022, received Royal Assent on April 14, 2022. The legislation amends six statutes, including the *Planning Act*, *Development Charges Act*, the *Ontario Heritage Act* and the *City of Toronto Act*, 2006. Among other matters, the legislation introduces punitive measures i.e. application fee refunds, for exceeding legislated review timelines. To conform with the amended legislation, and ensure the review timelines are met, **City Planning has made organizational, policy, process and technology improvements.**<sup>37</sup> These changes include, but are not limited to, the implementation of a multi-divisional team-based structure to streamline the processing of all development applications; policy amendments to enable the delegation (i.e. approval) of four types of minor zoning by-laws by a committee or City official; as well as the introduction of Mandatory Pre-Application Consultations (PACs) and the requirement of a Complete Application for an application to be reviewed and processed by staff. Further legislative changes have been proposed by Bill 185, the proposed *Cutting Red Tape to Build More Homes Act*, announced April 12, 2024. If enacted, this Act will further alter the context of the City's development approval processes.

**Inclusionary Zoning** is a policy and zoning framework that requires a certain percentage of affordable housing gross floor area in new residential developments, creating mixed-income housing. It was adopted by Council on November 12, 2021 and has been advanced with Implementation Guidelines and additional market analyses.<sup>38</sup> Following the approval of the City's MTSA and PMSTA delineations by the Ministry of Municipal Housing and Affairs, the City will be able to apply affordable housing requirements to new development projects located in PMSTAs that meet a minimum development size.

**Expanding Housing Options in Neighbourhoods (EHON)** is a City of Toronto program to facilitate more low-rise housing in residential neighbourhoods to meet the needs of our growing city.<sup>39</sup> The City is working to expand opportunities for “missing middle” housing forms in Toronto, ranging from duplexes to low-rise walk-up apartments. The additional forms of housing could add to the supply of highly desired low-rise housing in the city and might help households shift to their right-size by dividing their dwellings into two smaller units or by aging in place in their current neighbourhood. EHON is comprised of multiple initiatives to address specific types of neighbourhood intensification, including the following:

- The **Garden Suites** study focused on permitting garden suites on properties without lane access in most residential zones across Toronto. In February 2022, City Council adopted Official Plan and Zoning By-law amendments to permit Garden Suites city-wide.
- The **Multiplex** study focused on permitting multiplexes – residential buildings containing up to four units – across Toronto’s low-rise neighbourhoods. In May 2023, City Council adopted Official Plan and Zoning By-law amendments to permit multiplexes city-wide.
- The **Major Streets** study focused on permitting gentle density – missing middle housing – on major streets in low-rise neighbourhoods across Toronto. In May 2024, City Council adopted Official Plan and Zoning By-law amendments to permit townhouses and small-scale apartment buildings (up to 6 storeys and 60 units) on properties that are located along major streets and designated Neighbourhoods in the Official Plan.

Preceding EHON, City Council adopted Official Plan and Zoning By-law amendments to permit **Laneway Suites** city-wide in July 2019.

**Regulation of Rental Housing Demolitions and Conversions** has been in place since 2006. The City’s Official Plan contains policies protect against the demolition or conversion of rental housing without replacement by requiring that projects proposing to demolish or convert a rental property containing six or more dwelling units apply for a Rental Housing Demolition and Conversion Permit. The Provincial Government’s Bill 23, the *More Homes Built Faster Act*, made changes to Section 111 of the *City of Toronto Act* to allow the Minister to make regulations imposing limitations and conditions on the City’s ability to prohibit and regulate the demolition and conversion of residential rental properties. At the time of writing no regulation has been issued, and the City continues to apply its existing rental replacement policies. Limiting Toronto’s ability to require rental replacement would negatively impact the supply of purpose-built rental units.

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

City Planning will continue to monitor Toronto’s housing supply and its impacts on Toronto households, reflecting the City’s efforts to create more housing for more people in more places.

## Appendix

### Dwelling Unit Completions and Absorptions

High-density condominium apartments continue to dominate the new construction landscape in Toronto. Since 2014, an average of 13,885 units, or 79% of the total built, are Condominium ownership (see Table A.1). Between 2019 and 2023, CMHC recorded 88,707 total residential units completed in Toronto, 75% of which were condominium apartments.<sup>40</sup>

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 A.3 compares the number

of completions and absorptions in Toronto over the last 15 years. The average percentage of unabsorbed units decreased from 8% in the 2009 to 2013 period to less than 1% from 2014 to 2018, rising slightly to 2% for the 2019 to 2023 period. The unabsorbed percentage of completed dwellings has remained small in Toronto, regardless of the tenure of the unit (see Table A.4).

The Market Absorption Survey demonstrates that the bulk of the unabsorbed units are in the purpose-built rental market. From 2019-2023, purpose-built rental completions represented 18% of

total completions, but 17% of total absorptions (see Tables A.1 and A.4). The higher rate of unabsorbed rental units, as seen in Table A.4, is not the result of an oversupply of this type of unit. The methodology of the Market Absorption Survey with regards to purpose-built rental requires that buildings must be 100% completed and that people are beginning to move in before the units become counted as “absorbed”. The recording of absorptions will tend to lag completions in the latest periods of the Survey. Therefore, the data on absorptions and completions needs to be cautiously interpreted.

**Table A.1: Completions by Submarket and by Intended Market**

| Year                          | Freehold     | Condominium   | Rental       | Total         | Condominium % |
|-------------------------------|--------------|---------------|--------------|---------------|---------------|
| <b>2009</b>                   | <b>2,231</b> | <b>9,322</b>  | <b>920</b>   | <b>12,473</b> | <b>75%</b>    |
| <b>2010</b>                   | 1,286        | 10,923        | 879          | 13,088        | 83%           |
| <b>2011</b>                   | 1,449        | 14,568        | 804          | 16,850        | 86%           |
| <b>2012</b>                   | 1,528        | 9,961         | 1,985        | 13,474        | 74%           |
| <b>2013</b>                   | 1,735        | 11,126        | 1,681        | 14,542        | 77%           |
| <b>2014</b>                   | 1,573        | 7,777         | 201          | 9,551         | 81%           |
| <b>2015</b>                   | 1,368        | 28,017        | 1,364        | 30,749        | 91%           |
| <b>2016</b>                   | 1,505        | 13,428        | 1,090        | 16,027        | 84%           |
| <b>2017</b>                   | 1,849        | 11,507        | 815          | 14,171        | 81%           |
| <b>2018</b>                   | 1,798        | 11,816        | 2,472        | 16,086        | 73%           |
| <b>2019</b>                   | 1,559        | 9,724         | 3,310        | 14,593        | 67%           |
| <b>2020</b>                   | 1,247        | 13,315        | 2,714        | 17,276        | 77%           |
| <b>2021</b>                   | 1,052        | 15,994        | 3,224        | 20,270        | 79%           |
| <b>2022</b>                   | 983          | 13,194        | 2,119        | 16,296        | 81%           |
| <b>2023</b>                   | 1,217        | 14,076        | 4,979        | 20,272        | 69%           |
| <b>Avg 10 yrs (2014-2023)</b> | <b>1,415</b> | <b>13,885</b> | <b>2,229</b> | <b>17,529</b> | <b>79%</b>    |
| <b>Percentage</b>             | <b>8%</b>    | <b>79%</b>    | <b>13%</b>   | <b>100%</b>   |               |

Source: Housing Now publications, Canada Mortgage and Housing Corporation

**Table A.2: Residential Unit Completions by Dwelling Type**

| Year                          | Single       | Semi        | Row         | Apartment<br>& Other | Total         |
|-------------------------------|--------------|-------------|-------------|----------------------|---------------|
| <b>2009</b>                   | <b>987</b>   | <b>408</b>  | <b>919</b>  | <b>10,159</b>        | <b>12,473</b> |
| <b>2010</b>                   | 849          | 166         | 230         | 11,843               | 13,088        |
| <b>2011</b>                   | 865          | 82          | 558         | 15,345               | 16,850        |
| <b>2012</b>                   | 877          | 230         | 457         | 11,910               | 13,474        |
| <b>2013</b>                   | 1,013        | 172         | 685         | 12,672               | 14,542        |
| <b>2014</b>                   | 1,205        | 136         | 456         | 7,754                | 9,551         |
| <b>2015</b>                   | 1,124        | 106         | 193         | 29,326               | 30,749        |
| <b>2016</b>                   | 1,250        | 108         | 296         | 14,373               | 16,027        |
| <b>2017</b>                   | 1,384        | 92          | 577         | 12,118               | 14,171        |
| <b>2018</b>                   | 1,039        | 140         | 876         | 14,031               | 16,086        |
| <b>2019</b>                   | 1,057        | 66          | 701         | 12,769               | 14,593        |
| <b>2020</b>                   | 1,009        | 70          | 124         | 16,073               | 17,276        |
| <b>2021</b>                   | 774          | 66          | 319         | 19,111               | 20,270        |
| <b>2022</b>                   | 698          | 92          | 280         | 15,226               | 16,296        |
| <b>2023</b>                   | 868          | 88          | 128         | 19,188               | 20,272        |
| <b>Avg 10 yrs (2014-2023)</b> | <b>1,041</b> | <b>96</b>   | <b>395</b>  | <b>15,997</b>        | <b>17,529</b> |
| <b>Percentage</b>             | <b>5.9%</b>  | <b>0.5%</b> | <b>2.3%</b> | <b>91.3%</b>         | <b>100%</b>   |

Source: Housing Now publications, Canada Mortgage and Housing Corporation



**Table A.3: Dwelling Unit Completions and Absorptions, City of Toronto**

| Year                       | Completions    | Absorptions    | Net Completions | "Unabsorbed" Percentage |
|----------------------------|----------------|----------------|-----------------|-------------------------|
| 2009                       | 12,473         | 11,704         | 769             | 6.6%                    |
| 2010                       | 13,088         | 12,075         | 1,013           | 8.4%                    |
| 2011                       | 16,850         | 15,868         | 982             | 6.2%                    |
| 2012                       | 13,474         | 12,009         | 1,465           | 12.2%                   |
| 2013                       | 14,542         | 13,868         | 674             | 4.9%                    |
| 2014                       | 9,551          | 9,620          | -69             | -0.7%                   |
| 2015                       | 30,749         | 29,451         | 1,298           | 4.4%                    |
| 2016                       | 16,027         | 16,629         | -602            | -3.6%                   |
| 2017                       | 14,171         | 14,675         | -504            | -3.4%                   |
| 2018                       | 16,086         | 15,855         | 231             | 1.5%                    |
| 2019                       | 14,593         | 13,850         | 743             | 5.4%                    |
| 2020                       | 17,276         | 17,063         | 213             | 1.2%                    |
| 2021                       | 20,270         | 19,938         | 332             | 1.7%                    |
| 2022                       | 16,296         | 15,944         | 352             | 2.2%                    |
| 2023                       | 20,272         | 19,982         | 290             | 1.5%                    |
| <b>Total</b>               | <b>245,718</b> | <b>238,531</b> | <b>7,187</b>    | <b>3.0%</b>             |
| <b>2009 - 2023</b>         | <b>16,381</b>  | <b>15,902</b>  | <b>479</b>      | <b>3.0%</b>             |
| <b>2009 - 2013 Average</b> | 14,085         | 13,105         | 981             | 7.5%                    |
| <b>2014 - 2018 Average</b> | 17,317         | 17,246         | 71              | 0.4%                    |
| <b>2019 - 2023 Average</b> | 17,741         | 17,355         | 386             | 2.2%                    |

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

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

**Table A.4: Dwelling Unit Completions and Absorptions by Type, City of Toronto**

| Year                        | Completions   | Absorptions   | Net Completions | "Unabsorbed" Percentage |
|-----------------------------|---------------|---------------|-----------------|-------------------------|
| <b>Freeholds</b>            |               |               |                 |                         |
| 2019                        | 1,559         | 1,506         | 53              | 3.5                     |
| 2020                        | 1,247         | 1,259         | -12             | -1.0                    |
| 2021                        | 1,052         | 1,131         | -79             | -7.0                    |
| 2022                        | 983           | 975           | 8               | 0.8                     |
| 2023                        | 1,217         | 1,063         | 154             | 14.5                    |
| <b>Total</b>                | <b>6,058</b>  | <b>5,934</b>  | <b>124</b>      | <b>2.1</b>              |
| <b>Condominiums</b>         |               |               |                 |                         |
| 2019                        | 9,724         | 9,556         | 168             | 1.8                     |
| 2020                        | 13,315        | 13,204        | 111             | 0.8                     |
| 2021                        | 15,994        | 16,073        | -79             | -0.5                    |
| 2022                        | 13,194        | 13,254        | -60             | -0.5                    |
| 2023                        | 14,076        | 14,164        | -88             | -0.6                    |
| <b>Total</b>                | <b>66,303</b> | <b>66,251</b> | <b>52</b>       | <b>0.1</b>              |
| <b>Purpose-Built Rental</b> |               |               |                 |                         |
| 2019                        | 3,310         | 2,788         | 522             | 18.7                    |
| 2020                        | 2,714         | 2,600         | 114             | 4.4                     |
| 2021                        | 3,224         | 2,734         | 490             | 17.9                    |
| 2022                        | 2,119         | 1,715         | 404             | 23.6                    |
| 2023                        | 4,979         | 4,755         | 224             | 4.7                     |
| <b>Total</b>                | <b>16,346</b> | <b>14,592</b> | <b>1,754</b>    | <b>12.0</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.

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

## Average Project and Unit Size

**Table A.5: Proposed Unit Types in Mid- and High- Rise Buildings the City of Toronto Development Pipeline by Status**

|                        | Studio Units  | 1-Bedroom Units | 2-Bedroom Units | 3+ Bedroom Units | Total Residential Units |
|------------------------|---------------|-----------------|-----------------|------------------|-------------------------|
| <b>City of Toronto</b> | <b>45,808</b> | <b>371,864</b>  | <b>206,334</b>  | <b>76,351</b>    | <b>700,357</b>          |
| <b>Under Review</b>    | 23,517        | 194,976         | 94,521          | 38,360           | <b>351,374</b>          |
| <b>Active</b>          | 16,218        | 123,860         | 75,439          | 27,666           | <b>243,183</b>          |
| <b>Built</b>           | 6,073         | 53,028          | 36,374          | 10,325           | <b>105,800</b>          |
| <b>% of Total</b>      | <b>6.5%</b>   | <b>53.1%</b>    | <b>29.5%</b>    | <b>10.9%</b>     | <b>100.0%</b>           |
| <b>Under Review</b>    | 6.7%          | 55.5%           | 26.9%           | 10.9%            | 100.0%                  |
| <b>Active</b>          | 6.7%          | 50.9%           | 31.0%           | 11.4%            | 100.0%                  |
| <b>Built</b>           | 5.7%          | 50.1%           | 34.4%           | 9.8%             | 100.0%                  |

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

Proposed residential units in development projects with activity between January 1, 2019 and December 31, 2023. 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: The number of units in Table 3 will differ from the number of units listed in Table 11, as not all projects proposed include a breakdown by unit type. A total of 19 projects that propose residential units do not contain the breakdown by unit types, accounting for 100,532 units.

**Table A.6: Average Project and Unit Size by Year Submitted, City of Toronto**

| Year        | Average # of Units Per Project | Average Unit Size (m <sup>2</sup> ) |
|-------------|--------------------------------|-------------------------------------|
| <b>2013</b> | <b>184</b>                     | <b>81</b>                           |
| <b>2014</b> | 182                            | 79                                  |
| <b>2015</b> | 249                            | 77                                  |
| <b>2016</b> | 303                            | 77                                  |
| <b>2017</b> | 260                            | 73                                  |
| <b>2018</b> | 182                            | 75                                  |
| <b>2019</b> | 307                            | 74                                  |
| <b>2020</b> | 348                            | 74                                  |
| <b>2021</b> | 616                            | 54                                  |
| <b>2022</b> | 404                            | 69                                  |
| <b>2023</b> | 380                            | 66                                  |

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

Development projects with activity between January 1, 2019 and December 31, 2023.

## Proposed Non-Residential GFA in City of Toronto by Use Type and by Status

Table A.7a: Proposed Non-Residential GFA in the City of Toronto by Use and Status

| Office                          |                |                  |                  |                   |               |                   |
|---------------------------------|----------------|------------------|------------------|-------------------|---------------|-------------------|
|                                 | Under Review   | Active           | Built            | Total in Pipeline | % of Total    | % of Growth Areas |
| <b>City of Toronto</b>          | <b>992,935</b> | <b>1,049,349</b> | <b>2,969,641</b> | <b>5,011,925</b>  | <b>100.0%</b> |                   |
| <b>Growth Areas</b>             | <b>645,299</b> | <b>987,668</b>   | <b>1,811,864</b> | <b>3,444,831</b>  | <b>68.7%</b>  | <b>100.0%</b>     |
| Downtown and Central Waterfront | 261,095        | 937,574          | 1,454,824        | 2,653,493         | 52.9%         | 77.0%             |
| Centres                         | 71,277         | 17,725           | 129,381          | 218,383           | 4.4%          | 6.3%              |
| Avenues                         | 85,876         | 8,465            | 94,028           | 188,369           | 3.8%          | 5.5%              |
| Other Mixed Use Areas           | 227,051        | 23,904           | 133,631          | 384,586           | 7.7%          | 11.2%             |
| All Other Areas                 | 347,636        | 61,681           | 1,157,777        | 1,567,094         | 31.3%         |                   |
| Retail                          |                |                  |                  |                   |               |                   |
|                                 | Under Review   | Active           | Built            | Total in Pipeline | % of Total    | % of Growth Areas |
| <b>City of Toronto</b>          | <b>978,757</b> | <b>432,154</b>   | <b>825,636</b>   | <b>2,236,547</b>  | <b>100.0%</b> |                   |
| <b>Growth Areas</b>             | <b>849,212</b> | <b>330,090</b>   | <b>628,193</b>   | <b>1,807,495</b>  | <b>80.8%</b>  | <b>100.0%</b>     |
| Downtown and Central Waterfront | 121,009        | 149,583          | 258,778          | 529,370           | 23.7%         | 29.3%             |
| Centres                         | 90,060         | 16,533           | 50,800           | 157,393           | 7.0%          | 8.7%              |
| Avenues                         | 220,597        | 84,896           | 156,657          | 462,150           | 20.7%         | 25.6%             |
| Other Mixed Use Areas           | 417,546        | 79,078           | 161,958          | 658,582           | 29.4%         | 36.4%             |
| All Other Areas                 | 129,545        | 102,064          | 197,443          | 429,052           | 19.2%         |                   |

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

Development projects with activity between January 1, 2019 and December 31, 2023. Built projects are those which became ready for occupancy and/or were completed. Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or those which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal. Gross floor area values are expressed in square metres.

**Table A.7b: Proposed Non-Residential GFA in the City of Toronto by Use and Status**

| <i>Industrial</i>               |                  |                |                  |                   |               |                   |
|---------------------------------|------------------|----------------|------------------|-------------------|---------------|-------------------|
|                                 | Under Review     | Active         | Built            | Total in Pipeline | % of Total    | % of Growth Areas |
| <b>City of Toronto</b>          | <b>782,808</b>   | <b>697,503</b> | <b>549,489</b>   | <b>2,029,800</b>  | <b>100.0%</b> |                   |
| <b>Growth Areas</b>             | <b>172,821</b>   | <b>51,743</b>  | <b>21,628</b>    | <b>246,192</b>    | <b>12.1%</b>  | <b>100.0%</b>     |
| Downtown and Central Waterfront | 44,632           | 34,679         | 15,636           | 94,947            | 4.7%          | 38.6%             |
| Centres                         | 0                | 0              | 0                | 0                 | 0.0%          | 0.0%              |
| Avenues                         | 97,429           | 974            | 0                | 98,403            | 4.8%          | 40.0%             |
| Other Mixed Use Areas           | 30,760           | 16,090         | 5,992            | 52,842            | 2.6%          | 21.5%             |
| All Other Areas                 | 609,987          | 645,760        | 527,861          | 1,783,608         | 87.9%         |                   |
| <i>Institutional and Other</i>  |                  |                |                  |                   |               |                   |
|                                 | Under Review     | Active         | Built            | Total in Pipeline | % of Total    | % of Growth Areas |
| <b>City of Toronto</b>          | <b>1,285,223</b> | <b>791,849</b> | <b>1,489,326</b> | <b>3,566,398</b>  | <b>100.0%</b> |                   |
| <b>Growth Areas</b>             | <b>946,259</b>   | <b>461,539</b> | <b>748,471</b>   | <b>2,156,269</b>  | <b>60.5%</b>  | <b>100.0%</b>     |
| Downtown and Central Waterfront | 611,234          | 336,183        | 476,616          | 1,424,033         | 39.9%         | 66.0%             |
| Centres                         | 33,160           | 1,917          | 57,401           | 92,478            | 2.6%          | 4.3%              |
| Avenues                         | 114,261          | 102,669        | 149,767          | 366,697           | 10.3%         | 17.0%             |
| Other Mixed Use Areas           | 187,604          | 20,770         | 64,687           | 273,061           | 7.7%          | 12.7%             |
| All Other Areas                 | 338,964          | 330,310        | 740,855          | 1,410,129         | 39.5%         |                   |

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

Development projects with activity between January 1, 2019 and December 31, 2023. 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.



## Largest Projects

**Table A.8: Development Projects Proposing ≥ 2,500 Residential Units**

|   |   | Proposed Residential Units |               | Proposed Residential GFA |               |
|---|---|----------------------------|---------------|--------------------------|---------------|
|   |   | #                          | %             | #                        | %             |
| <b>Total Proposed Residential Units</b>   |   | <b>800,889</b>             | <b>100.0%</b> | <b>55,309,250</b>        | <b>100.0%</b> |
| <b>Proposed Residential Units ≥ 2,500</b> |   | <b>196,387</b>             | <b>24.5%</b>  | <b>10,852,677</b>        | <b>19.6%</b>  |
| <b>Active Projects</b>                    |   | <b>27,877</b>              | <b>14.2%</b>  | <b>1,950,165</b>         | <b>18.0%</b>  |
| 1181 SHEPPARD AVE E                       | Avenue, Sheppard East Subway Corridor                               | 5,398                      | 2.7%          | 448,584                  | 4.1%          |
| 844 DON MILLS RD                          | Other Mixed Use Area, Don Mills Crossing                            | 4,974                      | 2.5%          | 376,408                  | 3.5%          |
| 21 DON VALLEY PKWY                        | All Other Areas, Unilever Precinct                                  | 4,300                      | 2.2%          | 302,000                  | 2.8%          |
| 1350 SHEPPARD AVE W                       | Avenue, Downsview   | 4,000                      | 2.0%          | 126,400                  | 1.2%          |
| 1245 DUPONT ST                            | Other Mixed Use Area  | 3,600                      | 1.8%          | 257,694                  | 2.4%          |
| 5415 DUNDAS ST W                          | Etobicoke Centre  | 2,875                      | 1.5%          | 217,645                  | 2.0%          |
| 3741 BLOOR ST W                           | Etobicoke Centre  | 2,730                      | 1.4%          | 221,434                  | 2.0%          |
| <b>Projects Under Review</b>              |   | <b>168,510</b>             | <b>85.8%</b>  | <b>8,902,512</b>         | <b>82.0%</b>  |
| 123 GARRATT BLVD                          | Downsview   | 46,000                     | 23.4%         | n/a                      | -             |
| 300 BOROUGH DR                            | Scarborough Centre  | 15,550                     | 7.9%          | 1,149,000                | 10.6%         |
| 6464 YONGE ST                             | Other Mixed Use Area, Yonge Street North                            | 8,324                      | 4.2%          | 639,606                  | 5.9%          |
| 2150 LAKE SHORE BLVD W                    | Other Mixed Use Area, Christie's                                    | 7,642                      | 3.9%          | 583,876                  | 5.4%          |
| 3585 ST CLAIR AVE E                       | Other Mixed Use Area  | 6,619                      | 3.4%          | 489,623                  | 4.5%          |
| 595 FRONT ST W                            | Downtown and Central Waterfront, Railway Lands West, Rail Deck Park | 5,754                      | 2.9%          | 366,027                  | 3.4%          |
| 1900 EGLINTON AVE E                       | Avenue, Golden Mile   | 5,529                      | 2.8%          | 453,255                  | 4.2%          |
| 250 THE EAST MALL                         | Other Mixed Use Area  | 5,269                      | 2.7%          | 367,897                  | 3.4%          |
| 3401 DUFFERIN ST                          | Other Mixed Use Area, Lawrence-Allen                                | 5,126                      | 2.6%          | 347,143                  | 3.2%          |
| 1966 EGLINTON AVE E                       | Avenue, Golden Mile   | 4,915                      | 2.5%          | 390,168                  | 3.6%          |
| 1911 FINCH AVE W                          | Avenue  | 4,600                      | 2.3%          | 325,383                  | 3.0%          |
| 1800 SHEPPARD AVE E                       | Other Mixed Use Area, Sheppard East Subway Corridor                 | 4,500                      | 2.3%          | 309,000                  | 2.8%          |
| 3850 SHEPPARD AVE E                       | Other Mixed Use Area  | 4,372                      | 2.2%          | 334,630                  | 3.1%          |
| 2400 EGLINTON AVE W                       | Avenue  | 4,057                      | 2.1%          | 232,736                  | 2.1%          |
| 1 CONCORDE GT                             | Other Mixed Use Area  | 3,914                      | 2.0%          | 286,737                  | 2.6%          |
| 1 EGLINTON SQ                             | Avenue, Golden Mile   | 3,618                      | 1.8%          | 312,297                  | 2.9%          |
| 1880-1890 EGLINTON AVE E                  | Avenue, Golden Mile   | 3,597                      | 1.8%          | 274,048                  | 2.5%          |
| 670 PROGRESS AVE                          | Scarborough Centre  | 3,413                      | 1.7%          | 196,289                  | 1.8%          |
| 5 TANGREEN CRT                            | All Other Areas   | 3,325                      | 1.7%          | 210,427                  | 1.9%          |
| 591 DUNDAS ST E                           | Downtown and Central Waterfront, Regent Park                        | 3,246                      | 1.7%          | 303,616                  | 2.8%          |
| 55 LAKE SHORE BLVD E (Block 4)            | Downtown and Central Waterfront                                     | 3,076                      | 1.6%          | 218,065                  | 2.0%          |
| 1940 EGLINTON AVE E (Block B)             | Avenue  | 3,075                      | 2.3%          | 204,005                  | 2.1%          |
| 2180 YONGE ST                             | Yonge Eglinton Centre   | 2,892                      | 1.5%          | 206,803                  | 1.9%          |
| 259 LAKE SHORE BLVD E                     | Downtown and Central Waterfront                                     | 2,752                      | 1.4%          | 179,628                  | 1.7%          |
| 6 THORNCLIFFE PARK DR                     | All Other Areas   | 2,665                      | 1.4%          | 191,157                  | 1.8%          |
| 793 DON MILLS RD                          | Other Mixed Use Area, Don Mills Crossing                            | 2,655                      | 1.4%          | 162,530                  | 1.5%          |
| 1571 SANDHURST CRCL                       | All Other Areas   | 2,555                      | 1.3%          | 189,715                  | 1.7%          |
| 1960 EGLINTON AVE E                       | Avenue, Golden Mile   | 2,545                      | 1.3%          | 182,856                  | 1.7%          |

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

Development projects with activity between January 1, 2019 and December 31, 2023. Built projects are those which became ready for occupancy and/or were completed. Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or those which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal. Gross floor area values are expressed in square metres.

**Table A.9: Development Projects Proposing  $\geq 100,000$  Square Metres of Non-Residential GFA**

| Project Location  |  | Proposed<br>Non-Residential GFA | Percent       |               |
|---|--|---------------------------------|---------------|---------------|
| <b>City of Toronto</b>  |  | <b>13,958,669</b>               | <b>100.0%</b> |               |
| <b>Proposed Non-Residential GFA</b>   | <b><math>\geq 100,000</math> m<sup>2</sup></b>         | <b>4,303,827</b>                | <b>30.8%</b>  | <b>100.0%</b> |
| <b>Built Projects</b>   |  | <b>591,872</b>                  | <b>13.8%</b>  |               |
| 45 BAY ST   | Downtown and Central Waterfront, Railway Lands East    | 143,196                         | 3.3%          |               |
| 6351 STEELES AVE E  | All Other Areas  | 128,743                         | 3.0%          |               |
| 156 FRONT ST W  | Downtown and Central Waterfront                        | 115,515                         | 2.7%          |               |
| 2233 SHEPPARD AVE W   | All Other Areas  | 102,991                         | 2.4%          |               |
| 120 BREMNER BLVD  | Downtown and Central Waterfront, Railway Lands East    | 101,427                         | 2.4%          |               |
| <b>Active Projects</b>  |  | <b>2,120,052</b>                | <b>49.3%</b>  |               |
| 21 DON VALLEY PKWY  | All Other Areas, Unilever Precinct                     | 926,000                         | 21.5%         |               |
| 325 FRONT ST W  | Downtown and Central Waterfront, Railway Lands Central | 273,592                         | 6.4%          |               |
| 82 BUTTONWOOD AVE   | All Other Areas, Mount Dennis                          | 168,845                         | 3.9%          |               |
| 25 KING ST W  | Downtown and Central Waterfront                        | 163,201                         | 3.8%          |               |
| 141 BAY ST  | Downtown and Central Waterfront, Railway Lands East    | 127,816                         | 3.0%          |               |
| 30 BAY ST   | Downtown and Central Waterfront                        | 123,854                         | 2.9%          |               |
| 171 FRONT ST W  | Downtown and Central Waterfront                        | 116,682                         | 2.7%          |               |
| 1 YONGE ST (Phases 4 and 5)   | Downtown and Central Waterfront                        | 113,302                         | 2.6%          |               |
| 555 REXDALE BLVD  | All Other Areas  | 106,760                         | 2.5%          |               |
| <b>Projects Under Review</b>  |  | <b>1,591,903</b>                | <b>37.0%</b>  |               |
| 123 GARRATT BLVD  | All Other Areas, Downsview                             | 1,114,000                       | 25.9%         |               |
| 555 UNIVERSITY AVE  | Downtown and Central Waterfront                        | 241,500                         | 5.6%          |               |
| 2150 LAKE SHORE BLVD W  | Other Mixed Use Areas, Christie's                      | 121,701                         | 2.8%          |               |
| 25 THE WEST MALL  | Other Mixed Use Areas, Sherway Area                    | 114,702                         | 2.7%          |               |
| <b>Proposed Non-Res GFA between 50,000 m<sup>2</sup> and 99,999 m<sup>2</sup></b> |  | <b>1,648,438</b>                | <b>11.8%</b>  |               |
| <b>Proposed Non-Res GFA between 10,000 m<sup>2</sup> and 49,999 m<sup>2</sup></b> |  | <b>5,351,458</b>                | <b>38.3%</b>  |               |
| <b>Proposed Non-Res GFA less than 10,000 m<sup>2</sup></b>                        |  | <b>2,654,947</b>                | <b>19.0%</b>  |               |

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

Development projects with activity between January 1, 2019 and December 31, 2023. 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.

## Proposals by District and Secondary Plan Area

**Table A.10: Proposed Development by Secondary Plan Area**

| Geography                    | Number of Projects | %            | Proposed Residential Units | %            | Proposed Non-Residential GFA | %            |
|------------------------------|--------------------|--------------|----------------------------|--------------|------------------------------|--------------|
| <b>City of Toronto</b>       | <b>2,344</b>       | <b>100%</b>  | <b>800,889</b>             | <b>100%</b>  | <b>13,958,669</b>            | <b>100%</b>  |
| <b>Secondary Plans</b>       | <b>1,103</b>       | <b>47.1%</b> | <b>551,943</b>             | <b>68.9%</b> | <b>9,603,367</b>             | <b>68.8%</b> |
| Agincourt                    | 9                  | 0.8%         | 11,690                     | 2.1%         | 52,659                       | 0.5%         |
| Central Don Mills            | 9                  | 0.8%         | 4,468                      | 0.8%         | 40,542                       | 0.4%         |
| Central Finch                | 14                 | 1.3%         | 879                        | 0.2%         | 2,398                        | 0.0%         |
| Central Waterfront           | 55                 | 5.0%         | 33,137                     | 6.0%         | 829,321                      | 8.6%         |
| Christie's                   | 2                  | 0.2%         | 7,642                      | 1.4%         | 124,534                      | 1.3%         |
| ConsumersNext                | 12                 | 1.1%         | 5,462                      | 1.0%         | 48,422                       | 0.5%         |
| Davenport Village            | 2                  | 0.2%         | 968                        | 0.2%         | 3,157                        | 0.0%         |
| Don Mills Crossing           | 5                  | 0.5%         | 9,124                      | 1.7%         | 90,975                       | 0.9%         |
| Downsview Area               | 11                 | 1.0%         | 50,917                     | 9.2%         | 1,171,067                    | 12.2%        |
| Downtown                     | 506                | 45.9%        | 186,927                    | 33.9%        | 4,467,983                    | 46.5%        |
| Dufferin Street*             | 10                 | 0.9%         | 4,916                      | 0.9%         | 15,852                       | 0.2%         |
| Emery Village                | 6                  | 0.5%         | 5,255                      | 1.0%         | 4,332                        | 0.0%         |
| Etobicoke Centre             | 30                 | 2.7%         | 19,522                     | 3.5%         | 146,420                      | 1.5%         |
| Fort York Neighbourhood      | 3                  | 0.3%         | 1,345                      | 0.2%         | 23,655                       | 0.2%         |
| Garrison Common North        | 47                 | 4.3%         | 9,765                      | 1.8%         | 368,835                      | 3.8%         |
| Golden Mile*                 | 21                 | 1.9%         | 33,840                     | 6.1%         | 190,621                      | 2.0%         |
| Highland Creek               | 14                 | 1.3%         | 844                        | 0.2%         | 51,943                       | 0.5%         |
| Keele Finch*                 | 7                  | 0.6%         | 4,036                      | 0.7%         | 45,413                       | 0.5%         |
| Keele St.Clair*              | 15                 | 1.4%         | 10,244                     | 1.9%         | 71,983                       | 0.7%         |
| King-Parliament              | 47                 | 4.3%         | 20,689                     | 3.7%         | 382,217                      | 4.0%         |
| King-Spadina                 | 76                 | 6.9%         | 25,981                     | 4.7%         | 636,011                      | 6.6%         |
| Lawrence-Allen               | 11                 | 1.0%         | 7,278                      | 1.3%         | 110,579                      | 1.2%         |
| Mimico-by-the-Lake           | 2                  | 0.2%         | 610                        | 0.1%         | 764                          | 0.0%         |
| Mimico-Judson                | 7                  | 0.6%         | 6,508                      | 1.2%         | 27,818                       | 0.3%         |
| Morningside Heights          | 6                  | 0.5%         | 0                          | 0.0%         | 100,099                      | 1.0%         |
| Motel Strip                  | 6                  | 0.5%         | 4,031                      | 0.7%         | 21,290                       | 0.2%         |
| Mount Dennis*                | 21                 | 1.9%         | 7,309                      | 1.3%         | 277,810                      | 2.9%         |
| North York Centre            | 34                 | 3.1%         | 14,065                     | 2.5%         | 81,169                       | 0.8%         |
| Port Union Village Community | 0                  | 0.0%         | 0                          | 0.0%         | 0                            | 0.0%         |

Table A.10 continues on page 63.

## Proposals by District and Secondary Plan Area

**Table A.10: Proposed Development by Secondary Plan Area**

| Geography                     | Number of Projects | %     | Proposed Residential Units | %    | Proposed Non-Residential GFA | %    |
|-------------------------------|--------------------|-------|----------------------------|------|------------------------------|------|
| Queen River                   | 7                  | 0.6%  | 1,981                      | 0.4% | 7,334                        | 0.1% |
| Rail Deck Park                | 1                  | 0.1%  | 5,754                      | 1.0% | 22,359                       | 0.2% |
| Railway Lands Central         | 4                  | 0.4%  | 2,229                      | 0.4% | 290,977                      | 3.0% |
| Railway Lands East            | 5                  | 0.5%  | 0                          | 0.0% | 450,204                      | 4.7% |
| Railway Lands West            | 3                  | 0.3%  | 6,036                      | 1.1% | 37,433                       | 0.4% |
| Regent Park                   | 11                 | 1.0%  | 6,212                      | 1.1% | 27,635                       | 0.3% |
| Scarborough Centre            | 14                 | 1.3%  | 28,787                     | 5.2% | 105,206                      | 1.1% |
| Sheppard East Subway Corridor | 44                 | 4.0%  | 23,149                     | 4.2% | 173,289                      | 1.8% |
| Sheppard Lansing Area         | 8                  | 0.7%  | 401                        | 0.1% | 3,734                        | 0.0% |
| Sheppard West/Dublin          | 11                 | 1.0%  | 1,217                      | 0.2% | 4,705                        | 0.0% |
| Sheppard Willowdale           | 5                  | 0.5%  | 244                        | 0.0% | 3,745                        | 0.0% |
| Sherway Area                  | 5                  | 0.5%  | 4,517                      | 0.8% | 191,111                      | 2.0% |
| Swansea                       | 4                  | 0.4%  | 893                        | 0.2% | 7,131                        | 0.1% |
| Unilever Precinct             | 2                  | 0.2%  | 4,300                      | 0.8% | 933,555                      | 9.7% |
| University of Toronto         | 20                 | 1.8%  | 479                        | 0.1% | 119,191                      | 1.2% |
| Warden Woods                  | 11                 | 1.0%  | 3,201                      | 0.6% | 28,473                       | 0.3% |
| Yonge-Eglinton                | 123                | 11.2% | 45,176                     | 8.2% | 236,420                      | 2.5% |
| Yonge St. Clair               | 29                 | 2.6%  | 7,902                      | 1.4% | 49,515                       | 0.5% |
| Yonge Street North*           | 15                 | 1.4%  | 16,227                     | 2.9% | 42,087                       | 0.4% |
| York University               | 5                  | 0.5%  | 860                        | 0.2% | 18,126                       | 0.2% |

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

1) Development projects with activity between January 1, 2019 and December 31, 2023. Built projects are those which became ready for occupancy and/or were completed. Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or those which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal. Gross floor area values are expressed in square metres.

2) The Centres boundaries on Map 2 of the Official Plan (Map 1 of this document) do not always correspond with the Secondary Plan boundaries on Map 35 of the Official Plan. The values in this table for the Secondary Plan projects with the same name as Centres may differ from Tables 1, 2, and 3 of this document.

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

\*Secondary Plan has been approved or endorsed by Council but has not yet been approved by the Province or is under appeal.

**Table A.11a: Proposed Projects in City of Toronto by Status and District**

| District               | Under Review | Active     | Built      | Total in Pipeline | % of Total   |
|------------------------|--------------|------------|------------|-------------------|--------------|
| <b>City of Toronto</b> | <b>850</b>   | <b>586</b> | <b>908</b> | <b>2,344</b>      | <b>100.0</b> |
| North                  | 183          | 128        | 220        | 531               | 22.7         |
| East                   | 190          | 73         | 120        | 383               | 16.3         |
| South                  | 322          | 288        | 427        | 1,037             | 44.2         |
| West                   | 155          | 97         | 141        | 393               | 16.8         |

**Table A.11b: Proposed Residential Units in City of Toronto by Status and District**

| District               | Under Review   | Active         | Built          | Total in Pipeline | % of Total   |
|------------------------|----------------|----------------|----------------|-------------------|--------------|
| <b>City of Toronto</b> | <b>436,421</b> | <b>106,071</b> | <b>258,397</b> | <b>800,889</b>    | <b>100.0</b> |
| North                  | 135,676        | 16,425         | 63,214         | 215,315           | 26.9         |
| East                   | 105,540        | 6,270          | 26,046         | 137,856           | 17.2         |
| South                  | 113,668        | 69,193         | 129,074        | 311,935           | 38.9         |
| West                   | 81,537         | 14,183         | 40,063         | 135,783           | 17.0         |

**Table A.11c: Proposed Non-Residential GFA in City of Toronto by Status and District**

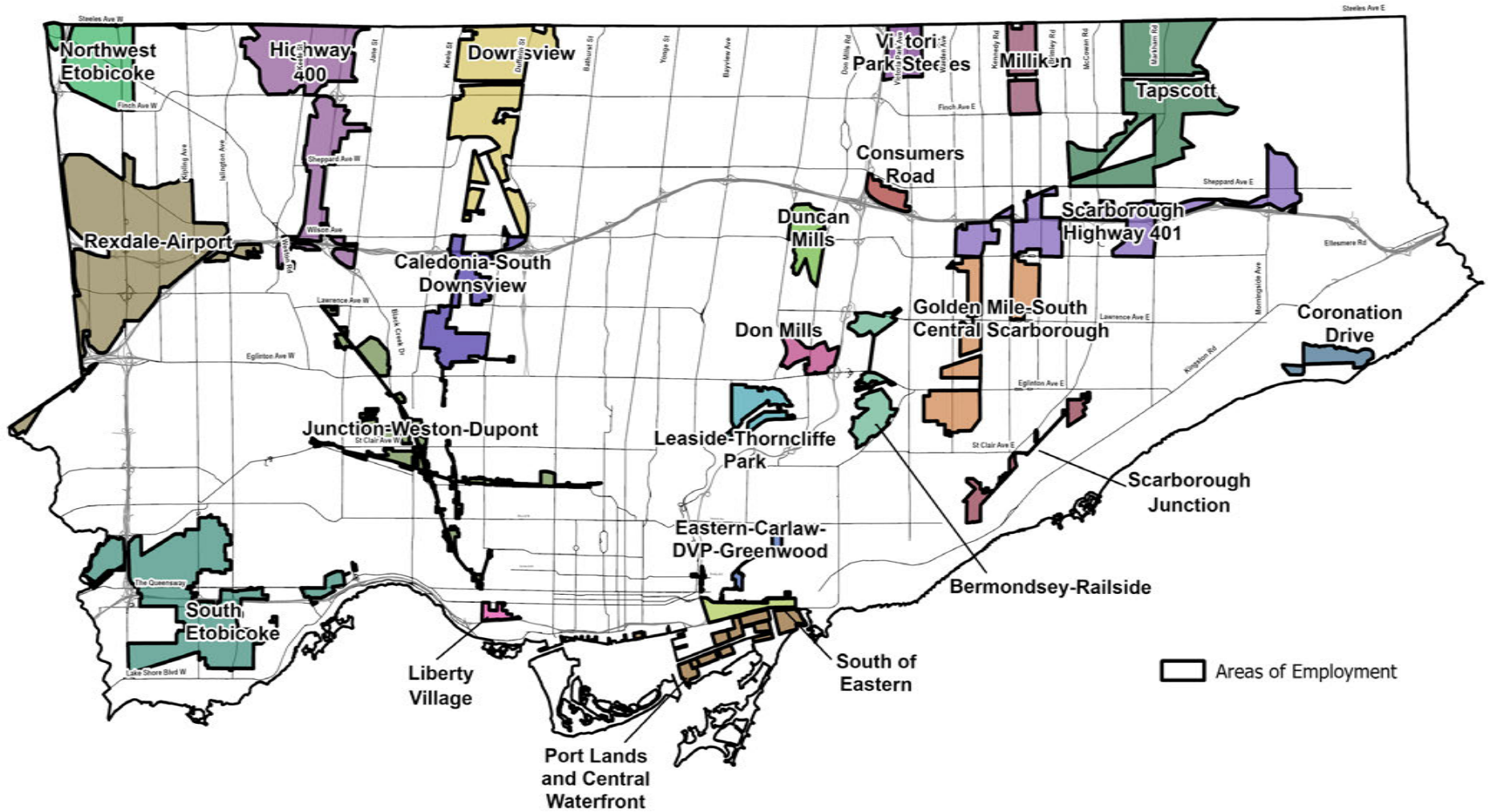
| District               | Under Review     | Active           | Built            | Total in Pipeline | % of Total   |
|------------------------|------------------|------------------|------------------|-------------------|--------------|
| <b>City of Toronto</b> | <b>5,153,722</b> | <b>2,970,855</b> | <b>5,834,093</b> | <b>13,958,670</b> | <b>100.0</b> |
| North                  | 1,770,099        | 291,508          | 646,617          | 2,708,224         | 19.4         |
| East                   | 1,038,057        | 336,537          | 463,112          | 1,837,706         | 13.2         |
| South                  | 1,538,323        | 1,785,808        | 3,724,755        | 7,048,886         | 50.5         |
| West                   | 807,243          | 557,002          | 999,609          | 2,363,854         | 16.9         |

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

Development projects with activity between January 1, 2019 and December 31, 2023. 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.



Map A.1: Areas of Employment



Source: Toronto City Planning Division, Planning Research and Analytics

Prepared by: Toronto City Planning Division, Planning Research and Analytics - June, 2024

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## Density

**Table A.12: Density of People and Jobs Per Hectare in Urban Growth Centres**

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

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

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

## Endnotes

- 1 The Site Plan Control threshold was increased to ten residential units in 2022 following Bill 23 – *More Homes, Built Faster Act*, 2022. The Development Pipeline includes projects with ten or fewer units requiring Site Plan Control if the Site Plan Control application was submitted prior to the change in regulation.
- 2 As reported in Appendix Table A.1 of the 2022 Q2 Pipeline Bulletin and which contained projects that were active between January 1, 2017 and December 31, 2021.
- 3 The 2021 Pipeline consisted of all development projects in the City of Toronto with any development activity between January 1, 2017 and December 31, 2021 and was shown in Appendix Table A.2 of the 2022 Q2 Development Pipeline Bulletin.
- 4 Some of these units may be in ground-related units as information is tracked based by project and not by structure, therefore some larger projects may contain ground-related as well as mid- or high-rise components.
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