

This bulletin illustrates how the city has developed and how it will continue to grow over time. It provides an overview of all development projects with approval or construction activity between January 1, 2020 and December 31, 2024.



# Development Pipeline 2024

## Highlights

Total Proposed Projects

**2,335**

Proposed Residential Units

**854,898**

Potential Population Capacity of the Development Pipeline (if fully built out)

**1,349,000**

Proposed Purpose-Built Rental Units

**131,676**

Proposed Non-Residential Gross Floor Area

**13,859,274**

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## 1.0 Introduction

Toronto, the most populous city in Canada, has experienced significant residential and non-residential development activity 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 active development projects and those under review 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 with regard to the *Provincial Planning Statement*. The Official Plan's Urban Structure Map, included in this bulletin as [Map 1](#) on page 3, identifies key geographies for accommodating housing, population and employment growth - referred to in this report as **Growth Management Areas**. Residential and non-residential development is directed to Downtown and the Central Waterfront, the Centres, and the Avenues. Beyond the Growth Management Areas, residential development is also directed to designated Mixed Use areas. Job intensification is prioritized in Employment Areas. Many of these geographies have the capacity to accommodate future growth, serviced by existing or planned infrastructure, transit and community services and facilities.

This bulletin illustrates how the city has recently developed and how it will continue to grow over time. It reports on development occurring citywide and within Growth Management Areas 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 City's Growing Up Guidelines, and the removal of residential parking minimums.

## What is the Development Pipeline?

The City of Toronto's Development Pipeline (2024 Q4) consists of all development projects with approval or construction activity in the five-year window between January 1, 2020 and December 31, 2024. 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.

It is important to note that not everything in the Development Pipeline will come into existence; not every project under review will be approved, and not every approved project will be constructed. An applicant’s decision to go through the development review process is not a guarantee the subject site will be developed immediately. As such, the Pipeline represents potential development in Toronto. Experience has shown that a large proportion of the Development Pipeline is built out in ten to fifteen years and is a good indication of near-term housing supply.

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

- **A development project** is the 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 City strives to enhance housing opportunities in neighbourhoods and has enabled gentle intensification across the city without requiring additional Planning approvals. The emergence of these housing types, as well as other “missing middle” housing forms, is discussed in the Neighbourhood Intensification Bulletin.<sup>2</sup> In addition, these types of development are monitored through the various Expanding Housing Options in

Neighbourhoods (EHON) monitoring programs.

Major Transit Station Areas (MTSAs) are not analyzed as a distinct geography in this Bulletin. Future Development Pipeline bulletins may specifically report on development activity occurring within MTSA and Protected MTSA boundaries.

Projects are categorized into three general statuses of Under Review, Active or Built, based on the stage of the development approvals and construction activity reached between January 1, 2020 and December 31, 2024. Select tables include a more detailed breakdown of Active projects, in addition to the three Pipeline status categories.

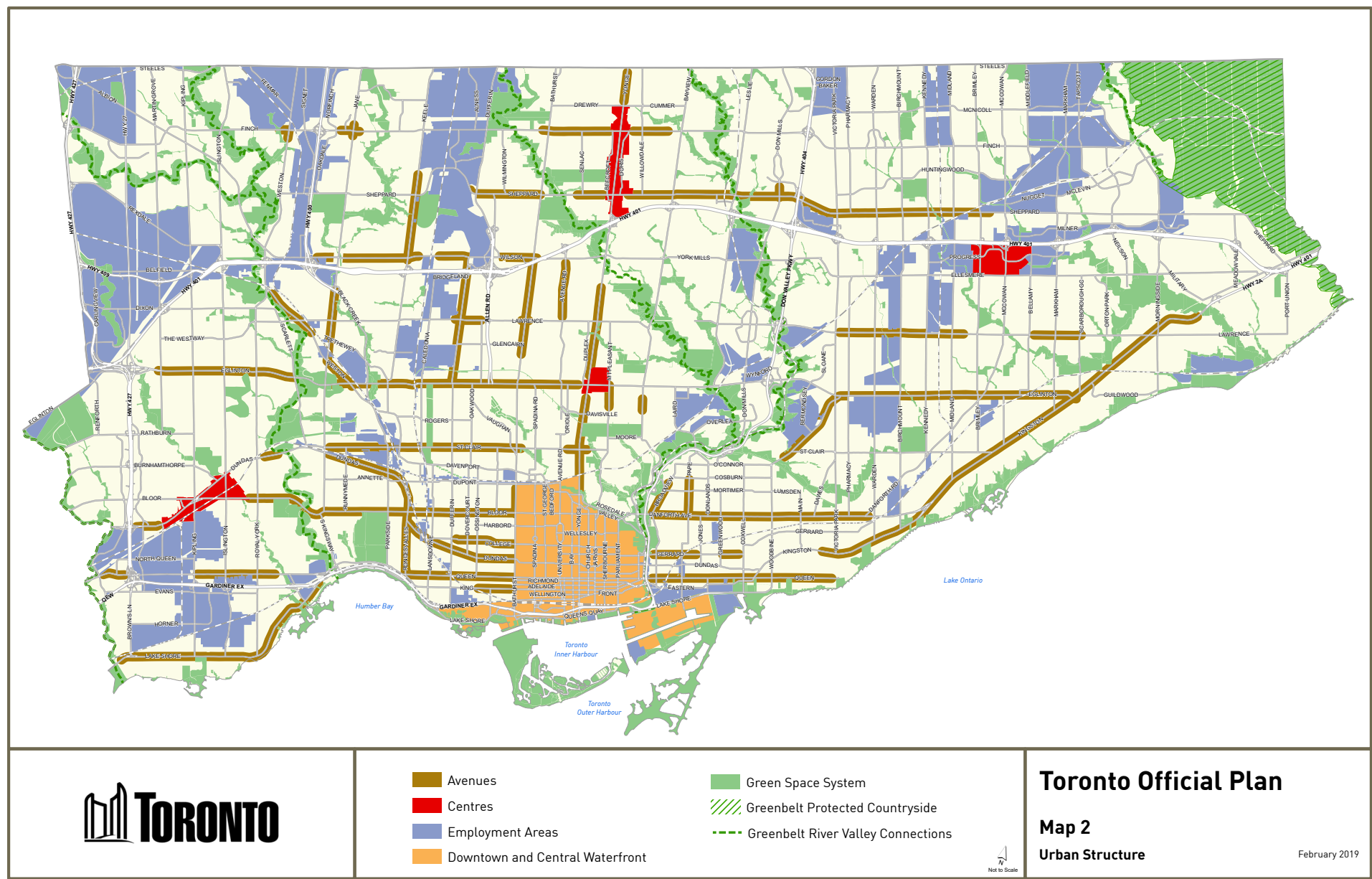
Large, complex projects are split into phases, enabling different parts of a development to be monitored independently as they progress. These phases typically align with Site Plan Control applications, focusing on proposed building locations and site-specific details.

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.
		Projects with at least one Planning approval, including projects that have received all necessary Planning approvals but have not yet applied for Building Permits.
	Approved	Approval of an Official Plan Amendment and/or Zoning By-Law Amendment is considered a “first approval”, and approval of a Site Plan Control Application, including the issuance of a Notice of Approval Conditions, is considered a “final approval”.
	Permit Application	Projects with at least one Planning approval that have applied for but have not yet been issued a Building Permit application.
Active	Work Started	Projects that have been issued building permits and are assumed to be under construction but are not yet built.
	Ready for Occupancy and/or Work Completed	Projects that became ready for occupancy and/or were completed during the period.
Built		

Notes:  
Planning Applications are only reviewed by City staff once the application has been deemed complete.  
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 be achieved prior to a Delegated approval on a Site Plan Control application.

Map 1: Official Plan Urban Structures Map



## 2.0 City-wide Development Overview

### The Development Pipeline January 1, 2020 – December 31, 2024

The five-year 2024 Q4 Development Pipeline is comprised of 2,335 development projects (see [Table 1](#) and [Table 2](#)). Cumulatively, these projects propose a record 854,898 residential units and 13,859,274 m<sup>2</sup> of non-residential gross floor area (GFA).

The 2024 Development Pipeline decreased by nine projects compared to the 2023 Pipeline. Although the net total number of projects in the Pipeline decreased since the last bulletin, 107 new proposals were submitted in 2024. The total number of projects decreasing despite new proposals being submitted is the result of the Pipeline having a multi-year analysis period – it simply means that more projects were completed and left the Pipeline than projects entered the Pipeline.

New projects were proposed in all areas of the city; however, the net number of projects increased exclusively within growth areas of the Official Plan, particularly along the Avenues. The number of projects along the Avenues increased by 82 projects, compared to the 2023 Pipeline, while the other growth areas either had minimal increases or decreases. With City Council's recent adoption of a new Avenues policy, with an expanded geography, it can be expected that future Development Pipelines will report greater increases of development along the Avenues once the new policy is in effect (see sidebar on page 34 for more information). The net increase of projects occurring exclusively within growth areas demonstrates the success of the City's policies in attracting and encouraging development in these areas.

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

	Projects		Proposed Residential Units		Total Proposed Non-Residential GFA (m <sup>2</sup> )	
Under Review	759	32.5%	432,376	50.6%	4,688,293	33.8%
Active	963	41.2%	307,056	35.9%	5,837,749	42.1%
<i>Approved</i>	505	21.6%	196,914	23.0%	3,658,542	26.4%
<i>Building Permit Applied For</i>	129	5.5%	38,779	4.5%	367,684	2.7%
<i>Under Construction</i>	329	14.1%	71,363	8.3%	1,811,524	13.1%
Built	613	26.3%	115,466	13.5%	3,333,232	24.1%
<b>TOTAL</b>	<b>2,335</b>	<b>100.0%</b>	<b>854,898</b>	<b>100.0%</b>	<b>13,859,274</b>	<b>100.0%</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, 2020 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 those which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal.



**Table 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/ Council Approval	Permit Application	Work Started				
<b>City of Toronto</b>	<b>759</b>	<b>963</b>	<b>505</b>	<b>129</b>	<b>329</b>	<b>613</b>	<b>2,335</b>	<b>100.0</b>	
<b>Growth Areas</b>	<b>512</b>	<b>640</b>	<b>367</b>	<b>91</b>	<b>182</b>	<b>442</b>	<b>1,594</b>	<b>68.3</b>	<b>100.0</b>
<b>Downtown and Central Waterfront</b>	132	223	120	30	73	162	517	22.1	32.4
<b>Centres</b>	38	61	33	9	19	26	125	5.4	7.8
<b>Avenues</b>	246	266	164	40	62	210	722	30.9	45.3
<b>Other Mixed Use Areas</b>	96	90	50	12	28	44	230	9.9	14.4
<b>All Other Areas</b>	247	323	138	38	147	171	741	31.7	

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

Development projects with activity between January 1, 2020 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 those which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal.

Residential projects have become larger and more complex, as is evident when comparing the number of Under Review and Active projects to those which were recently Built (see [Table 3](#) on page 6). There are 141 projects proposing 1,000-2,499 units, just over one half of these projects are Under Review while 42% are Active, and the remaining 6% are Built projects. The 74 projects Under Review account for 112,050 units, 13% of the Development Pipeline. There are another 34 projects, most of them Under Review, proposing 2,500 units or more. Despite accounting for only 1.5% of residential projects in the Pipeline, these 24 projects account for 19% of the units in the Development Pipeline.

Large-scale non-residential projects are contributing an outsized proportion of non-residential GFA to the Development Pipeline (see [Table 4](#) on page 6). There are three Under Review non-residential projects proposing 100,000 m<sup>2</sup> or more of non-residential GFA that together represent 10% of the total non-residential GFA proposed

in this Pipeline. Note that there are few Built projects of this magnitude as large projects that are shown as Under Review or Active may become divided into smaller components by the time they are Built. Once large, multi-phased projects are approved by Council, they are subsequently divided into individual phases, typically representing a single Site Plan Control Application. This enables more accurate tracking and reporting of each portion of the project.

[Figure 1](#) on page 7 shows that the number of projects submitted annually between 2005 and 2024 has remained relatively steady over the last 20 years, while the number of residential units proposed and the overall GFA of projects increased substantially in recent years. The number of projects received in 2023 and 2024 are noticeably lower, however the projects are typically of a larger scale than projects that were submitted over five years ago. 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 Planning applications in 2021 was partially triggered by the anticipated implementation of Inclusionary Zoning in 2022, and 2023 and 2024 have seen a decline in new projects reflecting the change in market conditions (see [Figure 2](#) on page 8).

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

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

Number of Units in Project	Number of Residential Projects				Number of Residential Units			
	Under Review	Active	Built	Total	Under Review	Active	Built	Total
1-199	201	326	212	739	13,931	23,622	16,085	53,638
200-999	295	338	199	832	143,552	163,351	89,246	396,149
1,000-2,499	74	59	8	141	112,050	83,711	10,135	205,896
2,500+	24	10	0	34	162,843	36,372	0	199,215

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

Development projects with activity between January 1, 2020 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 those which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal.

**Table 4: Proposed Non-Residential Projects and GFA in City of Toronto by Status and Size**

Proposed Non-Residential GFA	Number of Non-Residential Projects				Amount of Non-Residential Gross Floor Area			
	Under Review	Active	Built	Total	Under Review	Active	Built	Total
1-4,999 sq m	434	504	293	1,231	496,855	567,123	359,927	1,423,905
5,000-49,999 sq m	131	184	114	429	2,229,043	2,709,681	1,702,655	6,641,378
50,000-99,999 sq m	9	4	10	23	611,992	306,153	673,446	1,591,591
100,000+ sq m	3	9	5	17	1,350,403	2,254,792	597,205	4,202,400

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

Development projects and proposed non-residential GFA within development projects with activity between January 1, 2020 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 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, Residential GFA and Non-Residential GFA by Application In-Take Year, 2005-2024

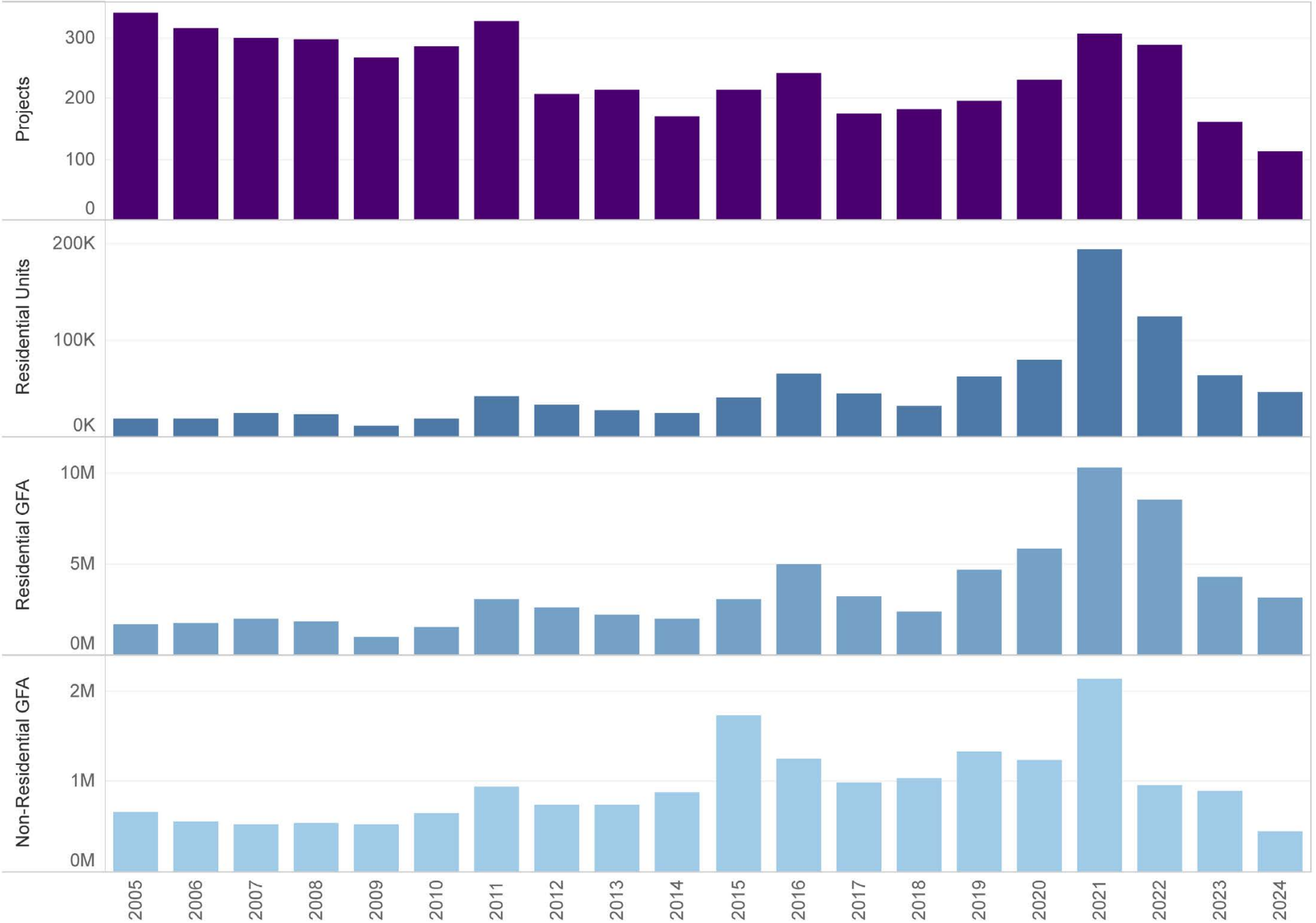
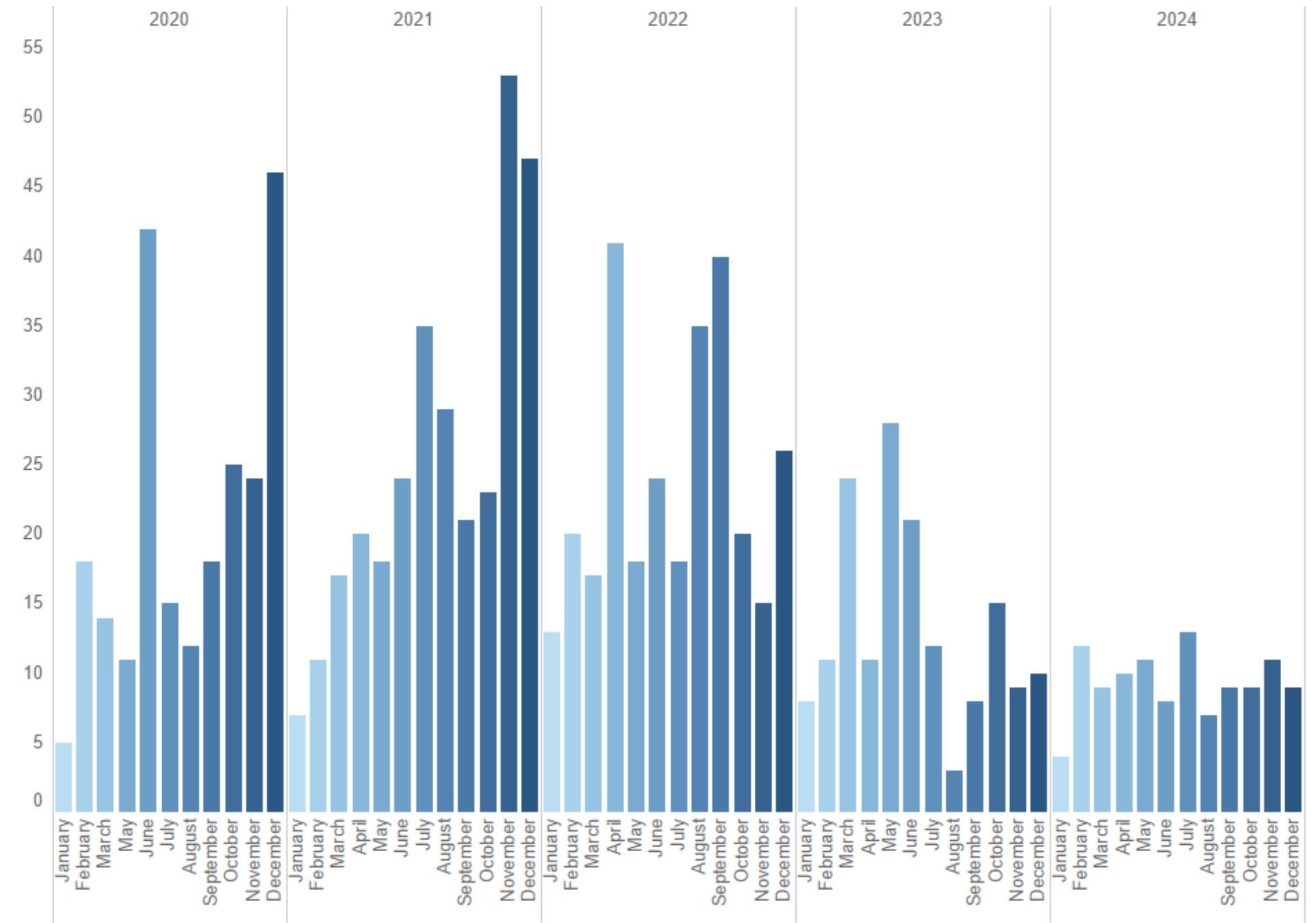


Figure 2: Number of Proposed Projects Submitted by Month





# 3.0 Residential Development

The confluence of local, national and global economic conditions has contributed to a negative shift in residential market activity over the past two years. Increased borrowing costs, rising construction costs, and economic uncertainty have all contributed to a slowdown in market activity. In particular, market interest in new condominium units has slowed. This change has a profound impact on the residential market at large, as condominium units make up the majority of the Development Pipeline. The Toronto condominium market has been heavily reliant on investor activity, with small units marketed as attractive investment opportunities. While borrowing costs have improved relative to two years ago, many investors continue to face negative cash flow as costs rise faster than rental incomes. Though recent

interest rate reductions and changes to lending rules offer some potential for market recovery, wider economic uncertainty due to trade tariffs, rising construction costs, labour shortages and lowered immigration targets continue to dampen confidence. Interest in pre-construction sales by both investors and owner-occupiers has declined. Developers are starting to pivot from condominium to purpose-built rental aided by government loan programs and incentives for building purpose-built rentals. In 2025, housing starts are anticipated to decline as fewer condominium projects are built. Delays in the construction of approved projects will have lasting effects on the housing supply, at a time when all levels are government are focused on increasing supply.

Despite the slowdown in market activity, new projects are being proposed and active development projects are still being advanced. The 2024 Development Pipeline contains 854,898 residential units, the highest ever recorded. This is 54,009 more units than the 2023 Development Pipeline, representing growth of 7% in the potential near-term housing supply in just one year. Across the Development Pipeline, 115,466 units are in Built projects that had activity in the last 5 years, which includes 89,440 units that first became ready for occupancy within the same period. Note that as-of-right construction not captured by the Pipeline, meaning that the actual number of units built through City processes is even higher. See [Table 5](#) and in [Map 2](#) and [Map 3](#) on pages 10 and 11.

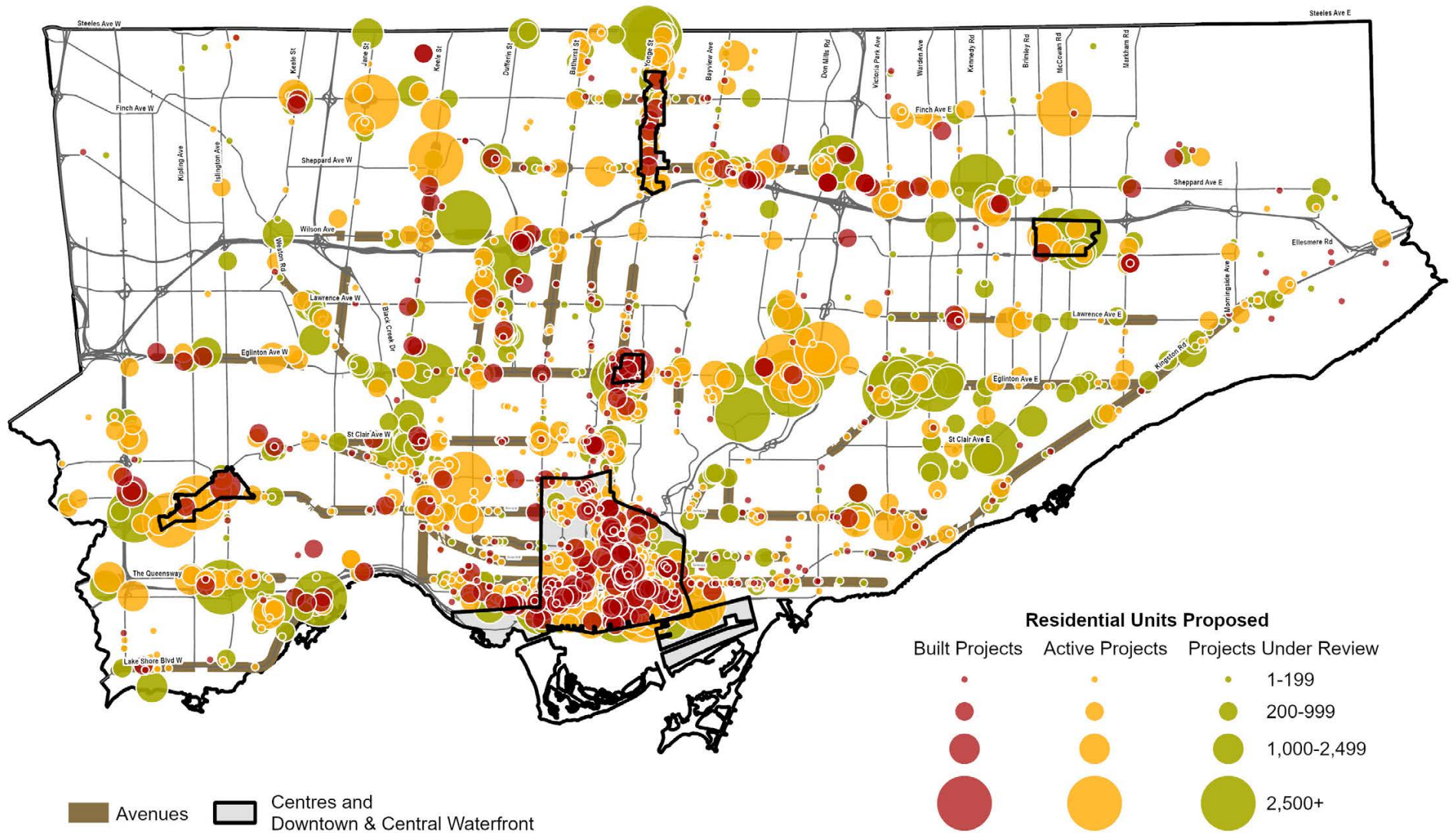
Table 5: Proposed Residential Units in City of Toronto by Status and Stage

	Under Review	Active				Built	Total in Pipeline	% of Total	% of Growth Areas
		Total Active	Delegated/ Council Approval	Permit Application	Work Started				
City of Toronto	432,376	307,056	196,914	38,779	71,363	115,466	854,898	100.0	
Growth Areas	313,537	258,838	162,093	32,739	64,006	102,447	674,822	78.9	100.0
Downtown and Central Waterfront	67,600	90,998	54,853	9,550	26,595	49,852	208,450	24.4	30.9
Centres	41,823	37,763	24,013	8,030	5,720	12,089	91,675	10.7	13.6
Avenues	105,119	73,925	52,796	9,387	11,742	21,463	200,507	23.5	29.7
Other Mixed Use Areas	98,995	56,152	30,431	5,772	19,949	19,043	174,190	20.4	25.8
All Other Areas	118,839	48,218	34,821	6,040	7,357	13,019	180,076	21.1	

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

Proposed residential units in development projects with activity between January 1, 2020 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 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

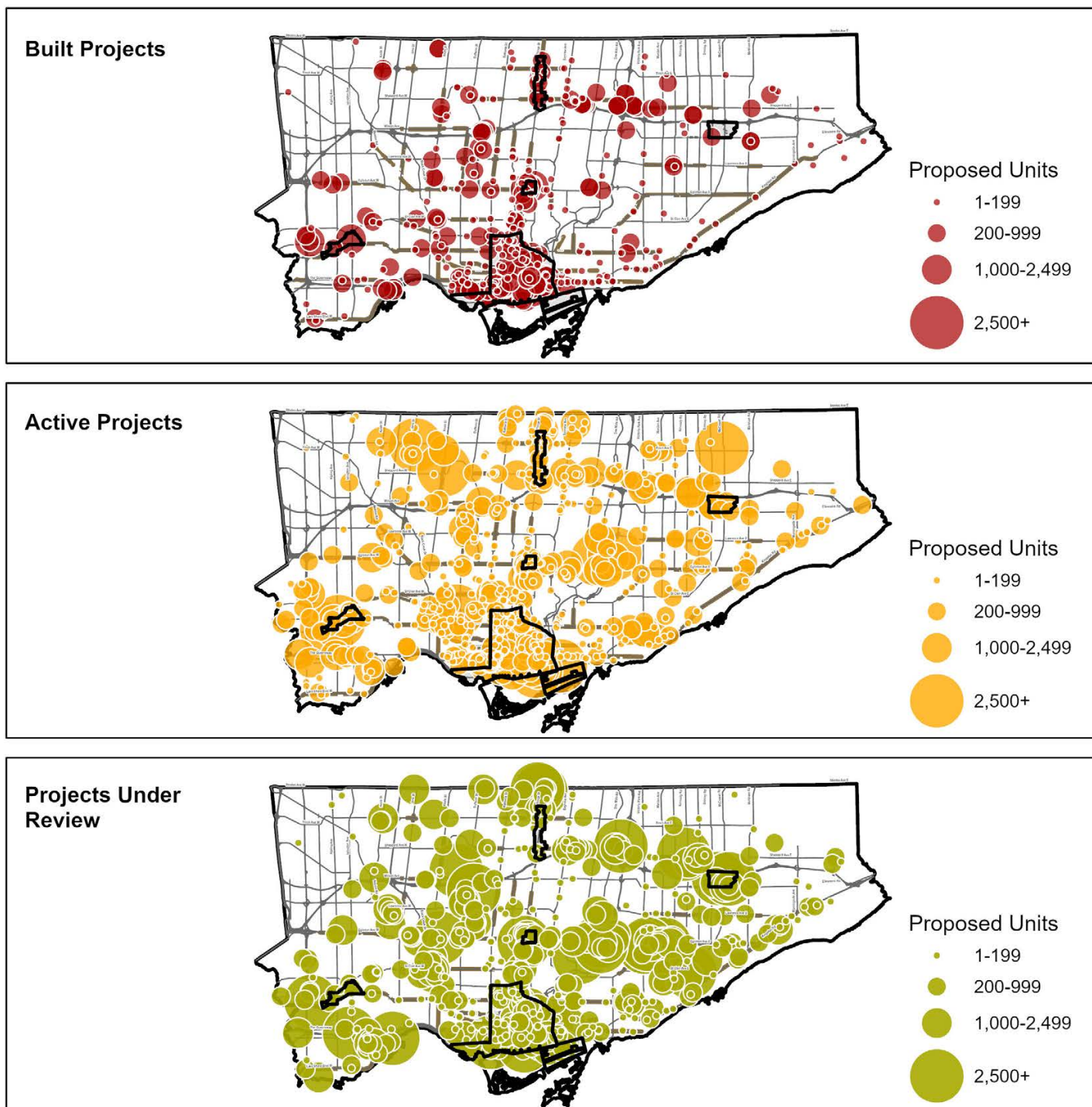
Development projects with activity between January 1, 2020 and December 31, 2024. Built projects are those which became ready for occupancy and/or were completed. Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal.

Prepared by: Toronto City Planning Division, Planning Research and Analytics - June, 2025

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### Map 3: Proposed Residential Development by Status



Source: Land Use Information System II

Development projects with activity between January 1, 2020 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

Most of the residential units in the 2024 Development Pipeline are Under Review (51%) or Active (36%), with the remainder Built during the five-year period. Of the residential units within Active projects, 64% (196,914 units) have received at least one Planning approval but have not yet applied for a Building Permit, 13% (38,779 units) have applied for, but not yet been issued, a Building Permit, and 23% (71,363 units) are currently under construction but have not yet been completed.

Proposed residential development has become increasingly distributed across the city. Areas outside of the Growth Management Areas and other Mixed Use Areas, referred to as All Other Areas in [Table 6](#), have seen the second largest increase in proposed residential units, increasing by 12,566 units or 8% year-over-year. While the number of projects proposed outside of the City's growth areas remained

stable between the 2021 and 2023 Development Pipelines, the number of projects proposed outside of the City's growth areas decreased in 2024, yet the number of residential units increased. This suggests that residential development outside of the City's growth areas is increasing in scale. There are 13,019 Built units, 48,218 Active units, and 118,839 units Under Review in All Other Areas, meaning that there are nine times the number of units under review than have been built over the last five years, and about two-and-a-half times more than the number of units in active projects. Units in projects Under Review represent 69% of proposed residential units in All Other Areas, compared to 47% of residential units in growth areas. Much 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

**Table 6: Average Number of Proposed Residential Units Per Project by Status**

Average Number of Proposed Residential Units per Project				
Units	Built	Active	Under Review	Total Pipeline
<b>City of Toronto</b>	<b>276</b>	<b>419</b>	<b>545</b>	<b>427</b>
<b>Growth Areas</b>	<b>323</b>	<b>475</b>	<b>542</b>	<b>461</b>
Downtown and Central Waterfront	415	514	552	495
Centres	504	687	773	674
Avenues	185	317	435	337
<b>Other Mixed Use Areas</b>	<b>334</b>	<b>702</b>	<b>730</b>	<b>617</b>
<b>All Other Areas</b>	<b>128</b>	<b>257</b>	<b>556</b>	<b>319</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, 2020 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 those which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal.



number of residential units proposed outside of growth areas is significantly more than what has been built since 2020.

Altogether, this indicates that the scale of projects and amount of residential development occurring outside the growth areas is increasing, and that there is a dispersion of growth from the city centre to the other parts of the city, other Secondary Plan Areas, and areas designated as either Apartment Neighbourhoods or Neighbourhoods. The increasing development activity outside of the growth areas recorded in the Development Pipeline, as well as new as-of-right permissions recently brought forward through the City's Expanding Housing Options in Neighbourhoods program,<sup>3</sup> indicate that there will be more change happening in these areas going forward.

Average project sizes are increasing throughout the city regardless of

geography (see [Table 6](#)). The relative size of Built, Active, and Under Review projects illustrates how the average size of developments has grown in recent years. At a city-wide level, Active residential projects are 52% larger than those recently Built, while Under Review projects are almost twice the size of those recently Built. In the growth areas, Under Review projects are 68% larger on average than those recently built, while outside the growth areas, Under Review projects are quadruple the size of recently built projects. This indicates an increase in overall project size and dispersal of larger projects to more areas of the city.

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 proposed development.

To enable the delivery of the 854,898 residential units proposed in the Pipeline, an estimated 76,086 existing units will be demolished, while 38,650 units are proposed to be retained on site for a total of 893,548 units. To calculate new housing supply potential, the estimated number of demolished units are subtracted from the 854,898 proposed new units for a net increase of 778,812 units in the city (see [Table 7](#)).

The 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 7: Proposed, Retained and Total Residential Units and GFA

8.9% Average Demolition Rate	Retained	Proposed	Total	Proposed %	Estimated Demolition	Net New Units or GFA
Total Residential Units	38,650	854,898	893,548	95.7%	76,086	778,812
Under Review	11,164	432,376	443,540	97.5%	38,481	393,895
Active	20,146	307,056	327,202	93.8%	27,328	279,728
Built	7,340	115,466	122,806	94.0%	10,276	105,190
Total Residential GFA	3,440,790	58,131,735	61,572,526	94.4%	5,173,724	52,958,011
Under Review	1,009,414	27,257,309	28,266,723	96.4%	2,425,901	24,831,409
Active	1,848,375	21,956,080	23,804,455	92.2%	1,954,091	20,001,989
Built	583,001	8,918,346	9,501,347	93.9%	793,733	8,124,613

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, 2020 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 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.

### 3.1 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 2020 to 2024, Council has consistently approved more residential units than were built (see [Table 8](#)).

The units shown in [Table 8](#) may differ from CMHC statistics because of methodological differences. In the Development Pipeline, units in the Planning process are classified as Built when the building is first ready for occupancy or substantially complete, whereas CMHC recognizes units as built once the building is fully complete.

City Council approved 234,699 residential units between 2020 and 2024, almost three times the number of residential units built over the same period. An average of 46,940 residential units received first Planning approval per year between 2020 and 2024, through Official Plan Amendment and Zoning By-law Amendment applications. Over the same period, an average of 17,888 units were built. Projects typically apply for Building Permits close to when they expect to receive 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, City Council approved an average of 24,342 residential units per year between 2020 and 2024. This is

**Table 8: Residential Units Approved and Built by Year, 2020 to 2024**

Year	Units Approved (Rezoning or Official Plan Amendment Approval)	Units Approved (Site Plan Application Approval)	Units Built
2020	22,663	25,924	17,988
2021	32,556	18,057	17,920
2022	73,047	19,733	16,870
2023	53,637	28,759	22,367
2024	52,796	29,238	14,295
<b>Total</b>	<b>234,699</b>	<b>121,711</b>	<b>89,440</b>
5 Year Average (2020- 2024)	46,940	24,342	17,888

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

Proposed residential units in development projects with activity between January 1, 2020 and December 31, 2024. Units approved (first approval) are units in projects that received their first planning approval in the year listed, in the form of a Rezoning or Official Plan Amendment approval. Units approved (final approval) are units in projects that received, or Notice of Approval Conditions (NOAC) or Statement of Approval for a Site Plan Application in the year listed. Units built are units in projects that became ready for occupancy and/or were completed in the year listed.

Note: the number of units built in Table 2 may differ from the number of units in built projects listed in Table 8, as some projects became ready for occupancy before 2020 but had other development activity (such as an application for a Draft Plan of Condominium) during the pipeline window of January 1, 2020 to December 31, 2024. These figures are different than those in Tables 8 and 9 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 as observed through field surveys.

a surplus of 6,454 units on average versus the units built or 136% of the average annual production through the Pipeline.

For development projects with first approval between 2020 and 2024, four-quarters of the number of units are in projects that are pursuing final approval or have not yet applied for Building Permits, 14% of the units are in projects that have applied for Building Permits, 9% are in projects that have been issued Building Permits and 2% of the units are in projects that are now 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.

The City of Toronto has contributed an increasing share of new housing stock in the Greater Toronto Area (GTA), as shown in [Table 9](#). CMHC reported that between 1995 and 1999 22% of the dwelling completions in the GTA occurred within the City of Toronto. Between 2020 and 2024, Toronto's share of GTA dwelling completions more than doubled to 50%. This growth occurred through intensification that is increasingly oriented towards high-rise built forms and infill housing. On average between 2020 and 2024, 6% of the units built per year were ground-related, made up of 862 single detached houses (4%), 79 semidetached houses (0.4%), and 273 row or townhouses (1%) per annum. In contrast, 94% or 18,430 units were apartments and other dwelling types (see [Appendix Table A.2](#)).

Table 9: Dwelling Completions, Greater Toronto Area

Year	Toronto Annual Average	Toronto Total	GTA Total	Toronto % of GTA
1995 - 1999	5,279	26,395	120,941	21.8%
2000 - 2004	10,565	52,826	214,512	24.6%
2005 - 2009	12,053	60,265	187,342	32.2%
2010 - 2014	13,501	67,505	167,797	40.2%
2015 - 2019	18,325	91,626	190,015	48.2%
2020 - 2024	19,645	98,224	195,657	50.2%
Total	-	396,841	1,076,264	36.9%
30-Year Annual Average 1995 - 2024	13,228	-	35,875	36.9%
10-year Annual Average 2015 - 2024	18,985	-	38,567	49.2%

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

3.2 Tenure

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 units for each tenure 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.

A mix of housing options, including rental and ownership tenure, is important for meeting the needs of a diverse city like Toronto. Condominiums have been the predominant tenure of units built not just within the Pipeline window but also the last 20 years.<sup>4</sup> Condominiums continue to be the predominant tenure across development projects, making up 81% of the units built over the last five years and 72% of the Active units in the Development Pipeline (see [Table 10](#)).

Over the last decade, a large part of Toronto’s condominium market has been dependent on investor activity driven by high population growth. Close to two-thirds of these units built after 2016 were found to be investment properties in Toronto Census

Metropolitan Area.<sup>5</sup> Many of these units were rented out or sold at a higher price. Interest in pre-construction sales by both investors and owner-occupiers has declined due to market conditions. However, recent interest rate reductions and changes to lending rules offer some potential for market recovery.

As condominium projects slow down, there are implications for the rental market. The condominium market serves as a supplier of secondary rental units (i.e. not as purpose-built rental units). Investors may defer selling units in favour of renting in the hope that the market improves. On the one hand, given the low investor interest in condominium projects, many developers are pivoting from condominium to purpose-built rental aided by federal loan programs and incentives for building purpose-built rentals. At the same time, construction may not be initiated for some approved projects as a result of financing issues. The result is that in the near term there is likely to be uptick in the supply of both rented condominium units and purpose-built rental units. The longer-term supply of rental units either through purpose-built projects or the secondary condominium market will be highly dependent on economic conditions and developer intentions over the next few years.

While condominium ownership units continue to be the predominant tenure for residential units in the Development Pipeline, the number of proposed purpose-built rental units is increasing. Of the 854,898 units in the Pipeline the proposed tenure is known for 744,191 units. Applicants have not yet provided the proposed tenure for the remaining 110,707 units. In total, there are 608,249 proposed condominium units, making up 71% of the total. There is a large proportion of units under review where the tenure has not yet been determined by the applicant, it can be assumed that these units will be a mix of condominium and purpose-built rental units.

Within the 2024 Q4 Development Pipeline, 553 projects propose to incorporate purpose-built rental units. Purpose-built rental units account for 15% of the total proposed residential units, or 131,676 units (see [Table 11](#), [Table 12](#) and [Map 4](#) on page 18). This is a 9% increase compared to the 2023 Development Pipeline. While the number of purpose-built rental units Under Review is less than the total in Active projects, the market’s changing view on purpose-built rental and government supports, such as the City’s Purpose-Built Rental Housing Incentives Stream, are likely to increase the number of purpose-built rental units Under Review in future Development Pipelines.

Table 10: Proposed Residential Units by Status and Tenure

Tenure	Built		Active		Under Review		Total	
	#	%	#	%	#	%	#	%
Condominium	93,522	81.0%	221,768	72.2%	292,959	67.8%	608,249	71.1%
Rental	19,488	16.9%	69,794	22.7%	42,394	9.8%	131,676	15.4%
Freehold	1,381	1.2%	1,340	0.4%	1,545	0.4%	4,266	0.5%
Tenure not yet determined by applicant	1,075	0.9%	14,154	4.6%	95,478	22.1%	110,707	12.9%

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

Proposed residential units in development projects with activity between January 1, 2020 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 those which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal.



**Table 11: Proposed Purpose-Built Rental Projects in City of Toronto by Status**

<b>Projects</b>						
	<b>Built</b>	<b>Active</b>	<b>Under Review</b>	<b>Total in Pipeline</b>	<b>% of Total</b>	<b>% of Growth Areas</b>
<b>City of Toronto</b>	<b>112</b>	<b>259</b>	<b>182</b>	<b>553</b>	<b>100%</b>	
<b>Growth Areas</b>	<b>91</b>	<b>192</b>	<b>138</b>	<b>421</b>	<b>76%</b>	<b>100%</b>
<b>Downtown and Central Waterfront</b>	32	70	29	131	24%	31%
<b>Centres</b>	11	20	7	38	7%	9%
<b>Avenues</b>	33	77	81	191	35%	45%
<b>Other Mixed Use Areas</b>	15	25	21	61	11%	14%
<b>All Other Areas</b>	<b>21</b>	<b>67</b>	<b>44</b>	<b>132</b>	<b>24%</b>	

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

Development projects with activity between January 1, 2020 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 those which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal.

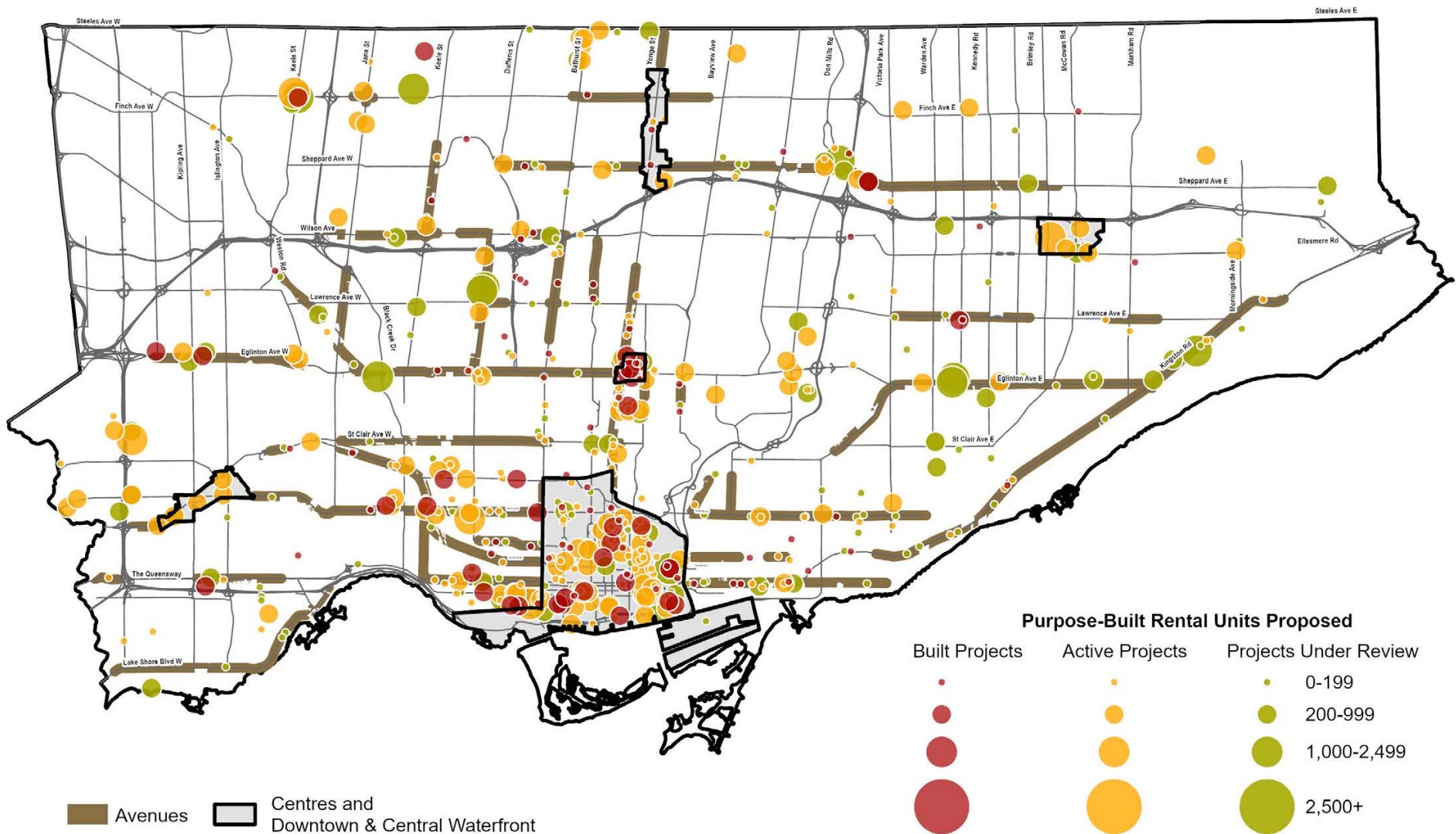
**Table 12: Proposed Purpose-Built Rental Units in City of Toronto by Status**

<b>Units</b>						
	<b>Built</b>	<b>Active</b>	<b>Under Review</b>	<b>Total in Pipeline</b>	<b>% of Total</b>	<b>% of Growth Areas</b>
<b>City of Toronto</b>	<b>19,488</b>	<b>69,794</b>	<b>42,394</b>	<b>131,676</b>	<b>100%</b>	
<b>Growth Areas</b>	<b>16,537</b>	<b>52,930</b>	<b>35,736</b>	<b>105,203</b>	<b>80%</b>	<b>100%</b>
<b>Downtown and Central Waterfront</b>	6,406	20,884	5,876	<b>33,166</b>	25%	32%
<b>Centres</b>	2,311	7,663	1,292	<b>11,266</b>	9%	11%
<b>Avenues</b>	4,867	15,529	18,416	<b>38,812</b>	29%	37%
<b>Other Mixed Use Areas</b>	2,953	8,854	10,152	<b>21,959</b>	17%	21%
<b>All Other Areas</b>	2,951	16,864	6,658	<b>26,473</b>	<b>20%</b>	

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

Proposed residential units in development projects with activity between January 1, 2020 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 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 4: Proposed Purpose-Built Rental Development



Source: Land Use Information System II

Development projects with activity between January 1, 2020 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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The large majority (80%) of purpose-built rental units in the Pipeline are in areas targeted for growth in the Official Plan. A greater proportion of proposed rental units are located in Downtown and the Central Waterfront and along the Avenues compared to all proposed units in the overall Pipeline.

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.

**Table 13** 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 169,205 purpose-built rental units, of which 47,691 are existing rental units, the large majority (79%) of which are intended to be retained and approximately 10,162 proposed to be demolished. If all projects in the 2024 Q4 Development Pipeline proposing purpose-built rental units were realized, there would be approximately 121,514 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. Note that the Development Pipeline does not capture purpose-built rental units in smaller developments that do not require a Planning application.

**Table 13: Net New Purpose-Built Rental Units in City of Toronto by Status**

	Existing Rental Units	Retained Rental Units	Proposed Rental Units	Total Rental Units	Approximate Net New Rental Units
<b>City of Toronto</b>	<b>47,691</b>	<b>37,529</b>	<b>131,676</b>	<b>169,205</b>	<b>121,514</b>
<b>Under Review</b>	15,369	10,922	42,394	53,316	37,947
<b>Active</b>	23,426	19,291	69,794	89,085	65,659
<b>Built</b>	8,896	7,316	19,488	26,804	17,908

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

Proposed residential units in development projects with activity between January 1, 2020 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 those which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal.

### 3.3 Unit Types

Along with having a mix of different tenures, it is important for Toronto to have a mix of unit types in the Pipeline to accommodate a variety of households.

**Table 14** provides a breakdown of proposed unit types by number of bedrooms, where this information has been provided by the applicants. Of the 854,898 proposed units in the Pipeline the unit type has been provided for 753,461 units. There are 405,301 one-bedroom units in the Pipeline, accounting for 47% of all units. Larger two- and three plus-bedroom units account for 25% and 10 % of the units in the Pipeline respectively. There are 101,437 residential units or 12% of the total units proposed for which the unit type 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 Site Plan approval process. We can expect these units to be a mix of all unit types. If the Growing Up Guidelines were

followed for these proposals, then about a quarter of these proposed units (45,918) could be two- and three plus-bedroom units. However, if the current unit type proportions observed in the Development Pipeline occurred in these projects, then about one third of the proposed units (35,199) could be two- and three plus-bedroom units.

In 2020, City Council adopted the Growing Up: Planning for Children in New Vertical Communities Urban Design Guidelines, which encourage private developers to build family-friendly units, see **Section 7.1 Growing Up Guidelines** for a more in-depth look at unit types and sizes.

**Appendix Table A.3** shows the average size of units in submitted applications has decreased from 78 m<sup>2</sup> in 2014 to 68 m<sup>2</sup> in 2024. This is a crude estimate based on dividing the total proposed residential GFA by the total proposed residential units. The declining average is reflective of the large number of studio and one-bedroom apartments proposed in the Development Pipeline.

**Table 14: Proposed Unit Types in the City of Toronto by Status**

	Studio	1-Bedroom	2-Bedrooms	3+ Bedrooms	Not defined by applicant	Total Residential Units
<b>City of Toronto</b>	<b>51,423</b>	<b>405,301</b>	<b>215,379</b>	<b>81,358</b>	<b>101,437</b>	<b>854,898</b>
<b>Under Review</b>	23,301	196,598	92,545	37,698	82,234	432,376
<b>Active</b>	21,263	151,363	82,768	32,636	19,026	307,056
<b>Built</b>	6,859	57,340	40,066	11,024	177	115,466
<b>% of Total</b>	6.0%	47.4%	25.2%	9.5%	11.9%	100.0%
<b>Under Review</b>	5.4%	45.5%	21.4%	8.7%	19.0%	100.0%
<b>Active</b>	6.9%	49.3%	27.0%	10.6%	6.2%	100.0%
<b>Built</b>	5.9%	49.7%	34.7%	9.5%	0.2%	100.0%

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

Proposed residential units in development projects with activity between January 1, 2020 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 those which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal.



# 4.0 Non-Residential Development

As with the residential market, the interplay of local, national, and global economic conditions has contributed to a slowdown in non-residential market activity. Additionally, the impact of hybrid working, accelerated by the COVID-19 pandemic, on how and where people live and work has contributed to limited activity in the non-residential market, particularly the office market. In the fourth quarter of 2024, investment activity across the GTA commercial real estate market was notably down, with a 21% decrease year-over-year in overall transaction volume and a 46% decrease for the office sector.<sup>6</sup> Projects that have already begun construction

are likely to continue to proceed through to occupancy, while those still in the planning stages may see delays or modifications to proposed non-residential components.

Across the 2,335 projects that are within the 2024 Q4 Development Pipeline, 1,700 projects propose non-residential gross floor area (GFA), totaling 13,859,274 m<sup>2</sup>, the equivalent of 50 Yorkdale Malls (see [Table 15](#), and [Map 5](#) and [Map 6](#) on pages 22 and 23).

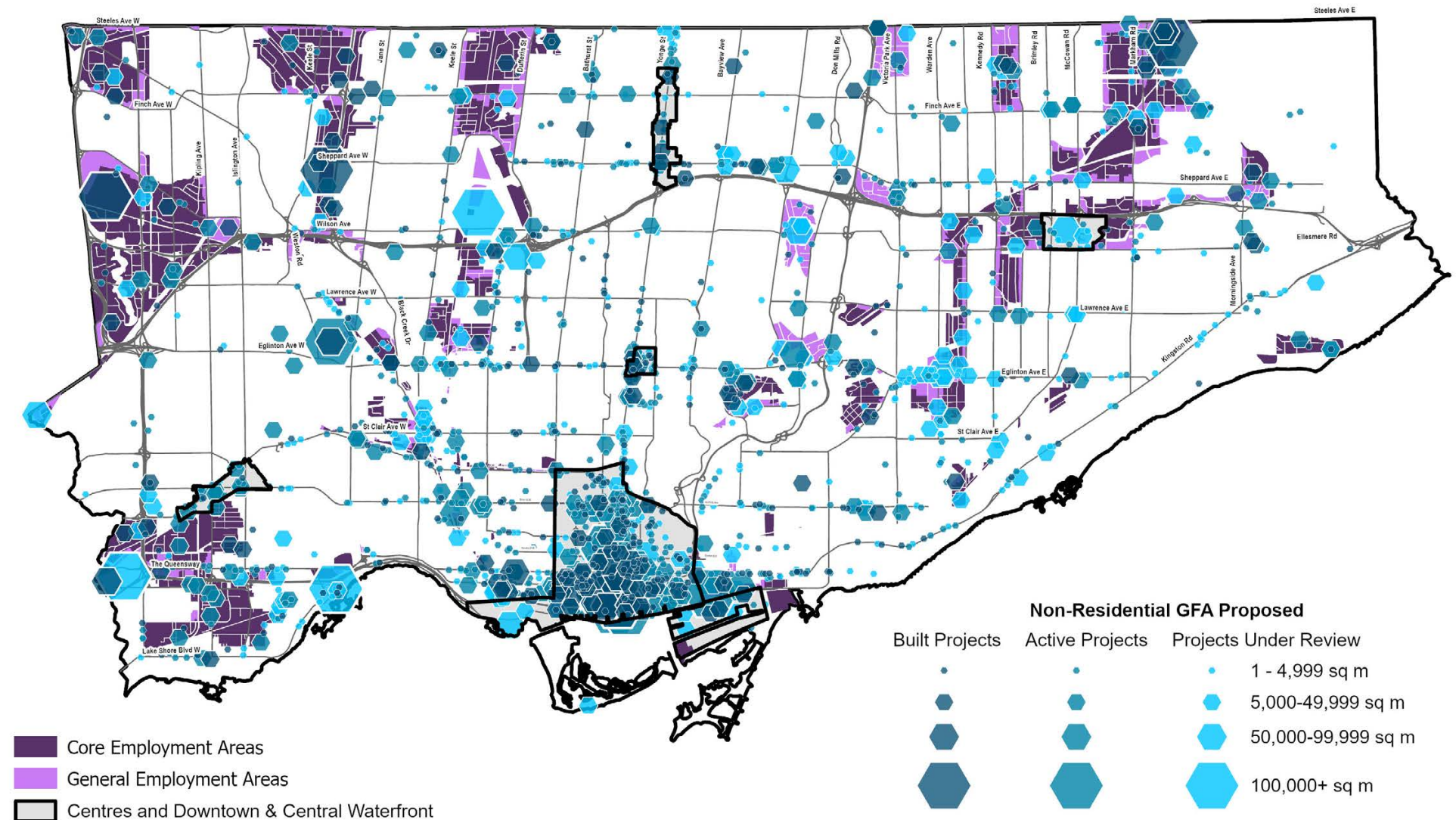
Table 15: Proposed Non-Residential GFA in City of Toronto by Stage and Status

	Under Review	Active				Built	Total in Pipeline	% of Total	% of Growth Areas
		Total Active	Delegated/ Council Approval	Permit Application	Work Started				
City of Toronto	4,688,293	5,837,749	3,658,542	367,684	1,811,524	3,333,232	13,859,274	100.0	
Growth Areas	2,202,950	3,431,266	2,221,245	213,844	996,177	1,868,920	7,503,136	54.1	100.0
Downtown and Central Waterfront	787,546	2,257,095	1,664,484	105,004	487,607	1,489,912	4,534,553	32.7	60.4
Centres	169,726	226,347	88,392	42,583	95,373	57,792	453,865	3.3	6.0
Avenues	415,167	527,930	319,593	40,995	167,342	201,329	1,144,426	8.3	15.3
Other Mixed Use Areas	830,511	419,894	148,777	25,263	245,854	119,887	1,370,293	9.9	18.3
All Other Areas	2,485,342	2,406,483	1,437,296	153,839	815,347	1,464,312	6,356,137	45.9	

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

Proposed residential units in development projects with activity between January 1, 2020 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 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

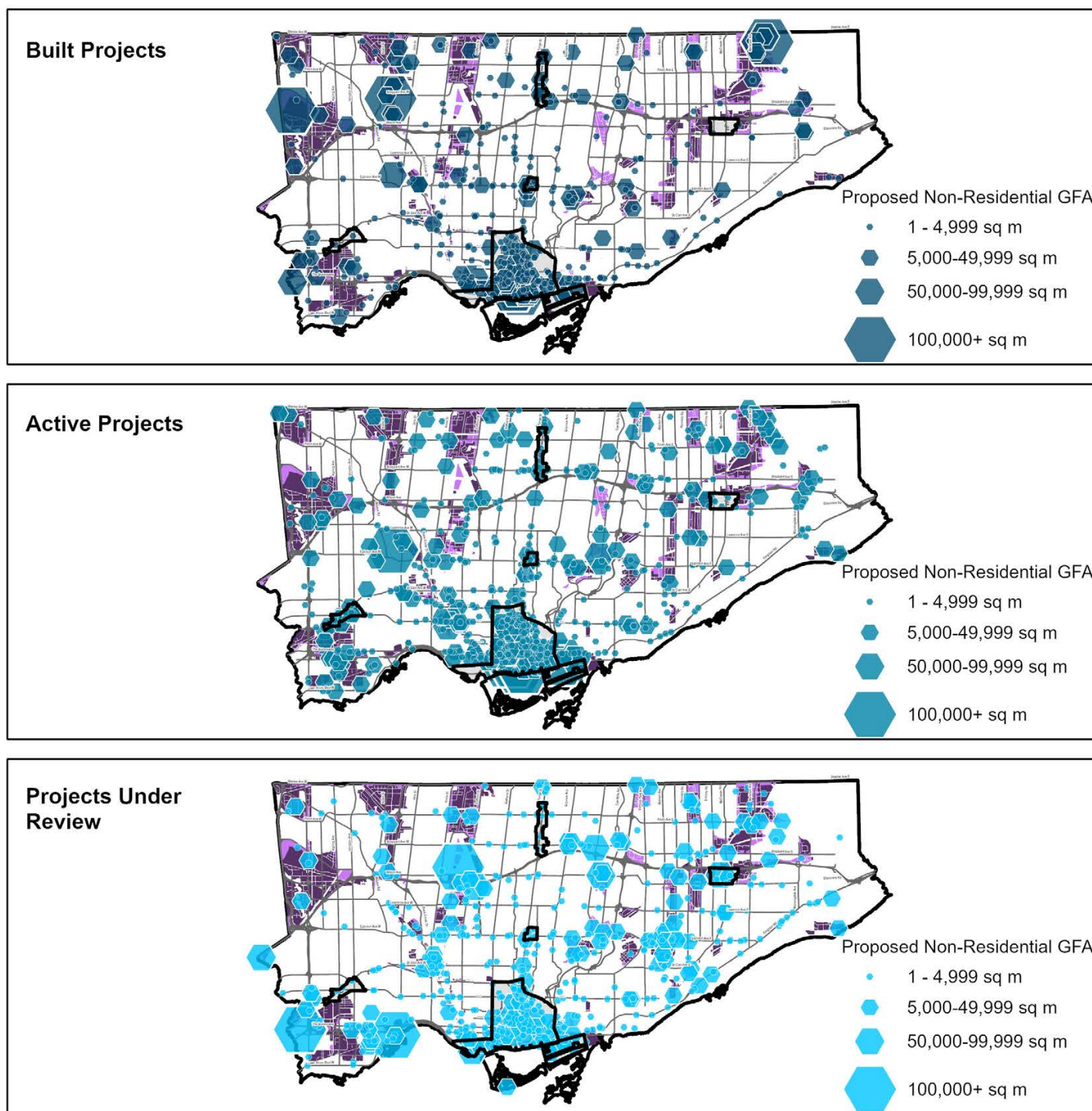
Development projects with activity between January 1, 2020 and December 31, 2024. Built projects are those which became ready for occupancy and/or were completed. Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal.

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## Map 6: Proposed Non-Residential Development by Status






Source: Land Use Information System II

Development projects with activity between January 1, 2020 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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Core Employment Areas   
General Employment Areas   
Centres and Downtown & Central Waterfront 

Non-residential development activity is relatively 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. While the city-wide total decreased slightly, by 0.7%, there were 76 new projects submitted in 2024 proposing non-residential space. The total non-residential GFA proposed along the Avenues, in Other Mixed Use Areas, and All Other Areas increased.

A total of 3,333,232 m<sup>2</sup> of non-residential GFA was built across the city between 2020 and 2024, almost one-quarter of the total Development Pipeline. The majority (55%) of this non-residential GFA was built within the growth areas.

The largest share (42%) of non-residential GFA is within Active projects, totaling 5,837,749 m<sup>2</sup>. The majority of non-residential GFA in

Active projects are those which have received at least one Planning approval (63% or 3,658,542 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 Development Pipeline contains 367,684 m of non-residential GFA (3%) within projects that have submitted Building Permit applications but have not yet been issued the necessary permits to initiate construction. About 31% of Active project non-residential GFA (1,811,524 m<sup>2</sup>, 13% of the total Pipeline) in the 2024 Pipeline is within projects that have been issued a Building Permit but have not yet completed construction. For every 100 m<sup>2</sup> of Council-approved non-residential space, 50 m<sup>2</sup> is under construction.

**Table 16: Average Non-Residential Gross Floor Area per Project by Status**

	Built	Active	Under Review	Total in Pipeline
<b>City of Toronto</b>	<b>6,561</b>	<b>5,178</b>	<b>5,815</b>	<b>5,738</b>
<b>Growth Areas</b>	<b>5,367</b>	<b>4,428</b>	<b>4,785</b>	<b>4,778</b>
Downtown and Central Waterfront	8,987	5,744	6,908	<b>7,050</b>
Centres	3,853	5,389	6,528	<b>5,468</b>
Avenues	1,899	2,550	2,129	<b>2,253</b>
<b>Other Mixed Use Areas</b>	<b>2,854</b>	<b>5,752</b>	<b>7,817</b>	<b>5,937</b>
<b>All Other Areas</b>	<b>9,622</b>	<b>7,328</b>	<b>8,413</b>	<b>8,298</b>

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

Average non-residential GFA within development projects with activity between January 1, 2020 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 those which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal.

About 34% of proposed non-residential GFA is in projects that are Under Review (4,688,293 m²). With Under Review non-residential GFA making up a lower proportion in the Development Pipeline than the proposed GFA in Active projects suggests that there may be a decline in non-residential development in Toronto in the near term.

Just over half (7,503,136 m²) of the proposed non-residential GFA is located with the city's growth areas, while the remaining 46% (6,356,137 m²) is located in All Other Areas, including in designated Employment Areas.

Non-residential project size varies across the city (see [Table 16](#)), with smaller scale projects being located along the Avenues and larger projects within Downtown and the Central Waterfront and outside the growth areas, including Employment Areas. Overall, non-residential projects

have slightly decreased in size when compared by Pipeline Status, yet again this varies across the different areas of the city. Declines in average project sizes were experienced in projects in Downtown and the Central Waterfront and outside the growth areas. These are two areas where larger projects are typically located, however, this trend indicates that the scale of projects in these areas is decreasing.

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 19,856,284 m² 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 17](#)).

**Table 17: Proposed, Retained and Total Non-Residential GFA**

	Retained	Proposed	Total	% of Total that are Newly Proposed
<b>City of Toronto</b>	<b>5,997,010</b>	<b>13,859,274</b>	<b>19,856,284</b>	<b>69.8%</b>
<b>Under Review</b>	1,636,262	4,688,293	6,324,554	74.1%
<b>Active</b>	2,527,355	5,837,749	8,365,104	69.8%
<b>Built</b>	1,833,393	3,333,232	5,166,625	64.5%

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

Proposed, retained and total non-residential GFA in development projects with activity between January 1, 2020 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 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.



4.1 Approved and Built Non-Residential GFA by Year

While council continuously approves large volumes of non-residential GFA through Rezoning and Official Plan Amendment approvals, due to shifting market conditions greater quantities of non-residential GFA is being built than being issued these types of approvals (see Table 18).

City Council approved an average of 489,476 m<sup>2</sup> of non-residential GFA per year between 2020 and 2024 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 673,432 m<sup>2</sup> of non-residential GFA per year

between 2020 and 2024. This is a surplus of 128,488 m<sup>2</sup> on average or a total of 124% of the average annual production through the Development Pipeline. Due to market conditions, there is an anticipated decline in office proposals in the near term.

4.2 Non-Residential Development by Type

4.2.1 Office

Overall, office vacancy in Toronto has continued to rise in the face of uncertain market conditions, reaching 19% in 2024 Q4, up from 12% in 2022 Q2 and from 4% in 2019 prior to the start of the COVID-19 pandemic.<sup>7</sup> Not all office space is the same, however, with Class A office space and newer office buildings having a comparatively lower vacancy rate.<sup>8</sup> Market commentary observes a “flight to quality” with B and C office space becoming less desirable.<sup>9</sup> Although activity related to office developments is down, construction is still taking

place and in 2024 Q4, Toronto accounted for 99% of the office space under construction in the GTA, with the Downtown area, as defined by CBRE, alone accounting for 82%.<sup>10</sup> Outside of the Downtown area, the bulk of office space construction is occurring in the North Yonge and Eglinton Yonge areas, as defined by CBRE.

Office uses account for about one-third of proposed non-residential GFA (4,738,259 m<sup>2</sup>), most of which is in Active projects (58%) while only 19% 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 spaces, rising interest rates, reduced demand, a shortage of skilled labour, and inflationary pressures on construction and material costs.

Projects that have already begun construction are likely to continue to proceed through to occupancy, while those still in the planning stages are

Table 18: Non-Residential GFA Approved and Built by Year, 2020 to 2024

Year	GFA First Approval (Rezoning or Official Plan Amendment Approval)	GFA Final Approval (Site Plan Application Approval)	GFA Built
2020	210,652	805,300	789,091
2021	524,986	552,720	500,297
2022	875,165	776,327	385,387
2023	353,014	605,818	693,202
2024	483,562	626,997	356,745
Total	2,447,379	3,367,161	2,724,722
5 Year Average (2020-2024)	489,476	673,432	544,944

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

Note 1: Non-residential GFA with “first Planning approval” is GFA in projects that received their first Planning approval in the year listed, in the form of an Official Plan Amendment or Rezoning approval. Non-residential GFA with “final Planning approval” is GFA in projects that received Notice of Approval Conditions (NOAC) or Statement of Approval for a Site Plan Application in the year listed. GFA Built is the floor area in projects that became ready for occupancy and/or were completed in the year listed.

Note 2: The non-residential GFA built in Table 2 may differ from the GFA in built projects listed in Table 18, as some projects became ready for occupancy before 2020 but had other development activity during the pipeline window of January 1, 2020 to December 31, 2024.

seeing delays or modifications to proposed non-residential components. The City recently conducted the Office Space Needs Study in response to the significant rise in office vacancies coming out of the COVID-19 pandemic and to address development pressures on office buildings. The Status Report to the Planning and Housing Committee in December 2024 observed that office development will continue to be challenging and the inclusion of significant amounts of office space in new development will not be feasible in many situations, and that there is the opportunity to provide a policy response to the major shift in office needs in Toronto to direct the appropriate amount and type of conversion activity.<sup>11</sup>

Increasing return-to-office mandates are supporting the recovery of the office market, however, the delivery of new office space into the market is maintaining increased vacancy rates.

4.2.2 Retail

Retail uses account for 19% of all proposed non-residential GFA, with about 22% contained in Built projects, 36% in Active projects, and 41% in projects Under Review (see [Table 19](#)). This pattern indicates an increase in the quantity of Retail uses being proposed. Proposed retail GFA is fairly evenly distributed throughout the city, with Downtown and the Central Waterfront and Other Mixed Use Areas having slightly larger proportions (see [Appendix Table A.4](#)).

4.2.3 Industrial

Industrial uses account for about 16% of all proposed non-residential GFA, with about 31% in projects Under Review.

Most proposed industrial GFA is located primarily in designated Employment Areas, included in All Other Areas (88%), as shown on [Map 7](#) (see page 28 for more on Employment Areas). In 2024 Q4,

Toronto accounted for 7% of all the industrial GFA currently under construction in the GTA<sup>12</sup>, the same as 2023 Q4,<sup>13</sup> a decrease from 18% in 2022 Q4.<sup>14</sup>

While industrial market activity has remained relatively stable in the post-COVID-19 era, evolving dynamics in the global trade landscape could influence the trajectory of future industrial development.

4.2.4 Institutional and Other

Institutional and Other GFA, which includes community services and facilities space as well as care homes, is almost one-quarter of all proposed non-residential GFA.

Institutional and Other GFA is also distributed throughout the city, with about 38% proposed within Downtown and the Central Waterfront, and another 38% proposed in All Other Areas.

Table 19: Proposed Non-Residential Gross Floor Area by Use Type

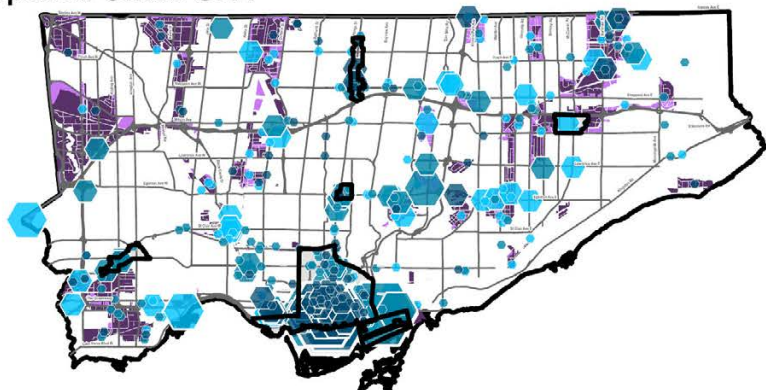
Area	Built	Active	Under Review	Total in Pipeline	Percent
Total Proposed Non-Residential GFA	3,333,231	5,837,744	4,688,292	13,859,268	100.0%
Retail	584,981	955,590	1,092,230	2,632,802	19.0%
Office	1,083,728	2,760,439	894,092	4,738,259	34.2%
Industrial	793,385	719,786	682,069	2,195,240	15.8%
Institutional and Other	871,137	1,401,929	905,901	3,178,967	22.9%
Use not yet determined	-	-	1,114,000	1,114,000	8.0%

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

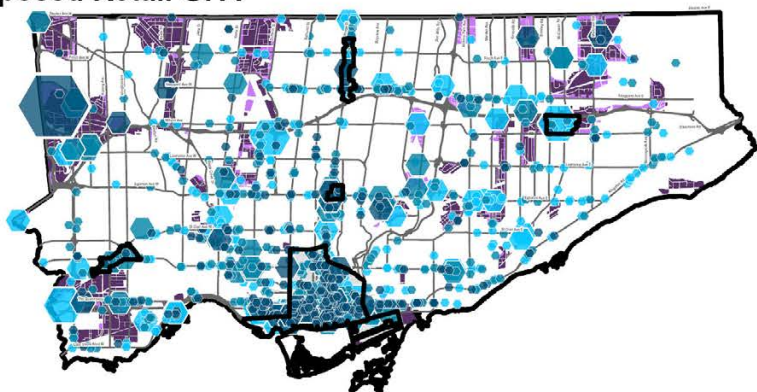
Proposed non-residential GFA in development projects with activity between January 1, 2020 and December 31, 2024. Built projects are those which became ready for occupancy and/or were completed. Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or 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. Use breakdown is estimated in cases that have retained non-residential GFA as well as more than one type of proposed non-residential use.

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

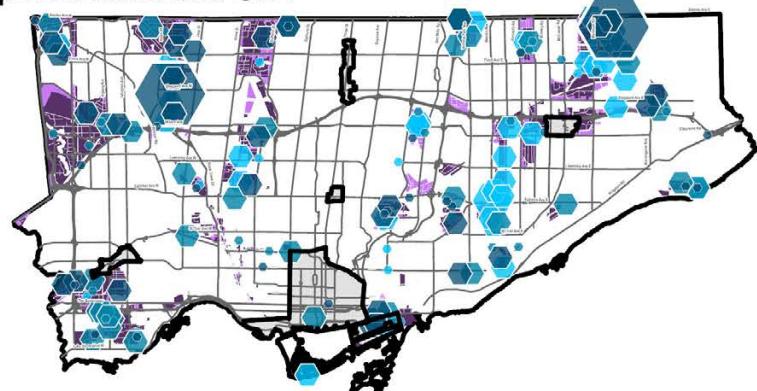
### Proposed Office GFA



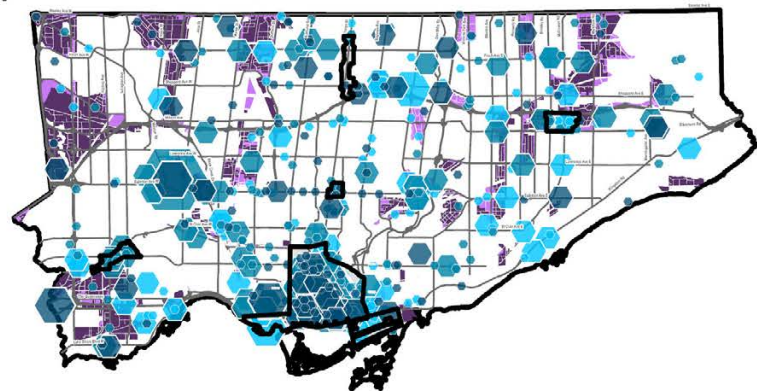
### Proposed Retail GFA



### Proposed Industrial GFA



### Proposed Institutional and Other GFA



### Proposed Non-Residential GFA

#### Built Projects

- 1 - 4,999 sq m
- 5,000-49,999 sq m
- 50,000-99,999 sq m
- 100,000+ sq m

#### Active Projects

- 1 - 4,999 sq m
- 5,000-49,999 sq m
- 50,000-99,999 sq m
- 100,000+ sq m

#### Under Review Projects

- 1 - 4,999 sq m
- 5,000-49,999 sq m
- 50,000-99,999 sq m
- 100,000+ sq m

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



Source: Land Use Information System II  
Development projects with activity between January 1, 2020 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.

Prepared by: Toronto City Planning Division,  
Planning Research and Analytics

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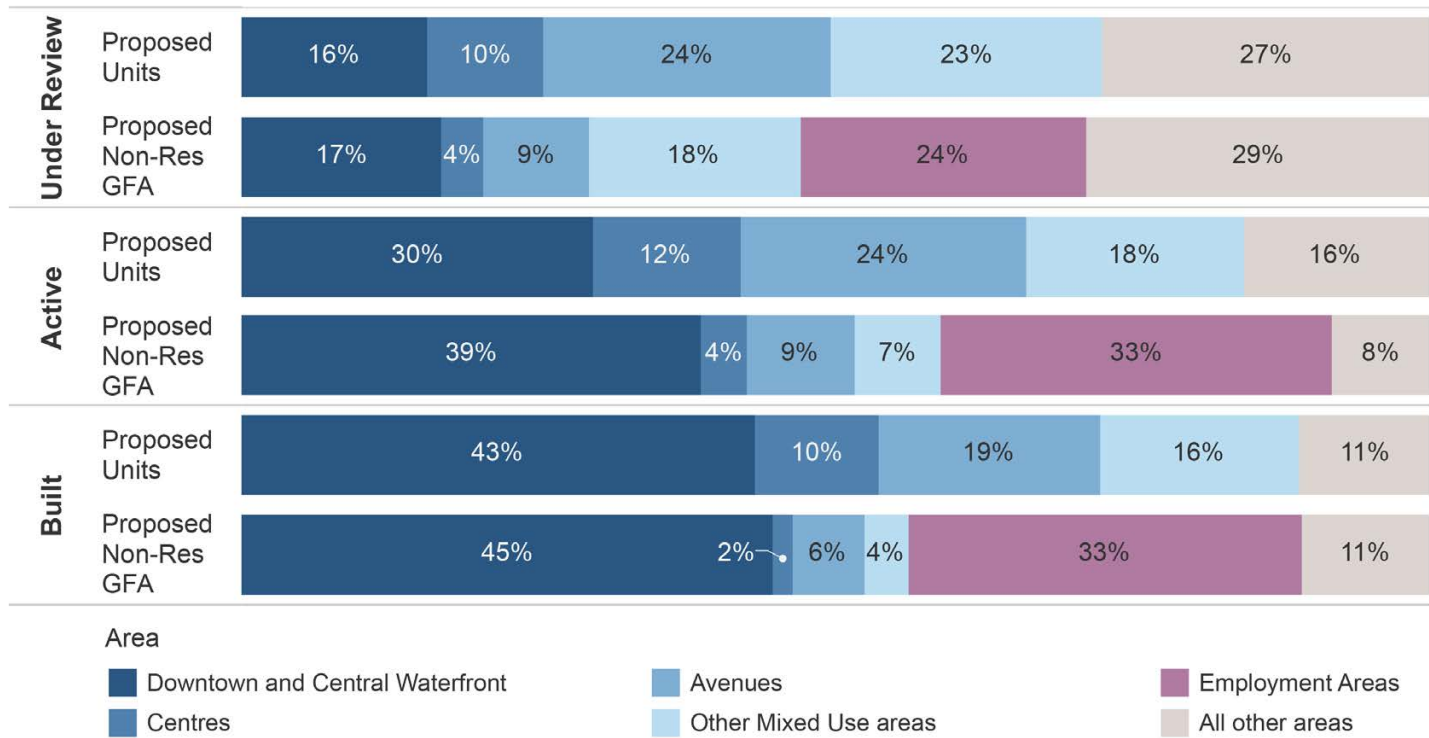
# 5.0 Area Specific Analysis

## 5.1 Development in Toronto's Growth Areas

Toronto's Official Plan (see [Map 1](#) on page 3) sets out specific areas where growth will be directed – **Downtown and the Central Waterfront**, the four **Centres** and along the **Avenues**. Beyond the defined areas on the Urban Structure map, there are lands designated as Mixed Use Areas which are also areas where residential growth is encouraged which are referred to as **Other Mixed Use Areas**. The next subsections explore development within these growth areas individually, as well as the remainder of the city which is referred to as **All Other Areas**. Non-residential development is also encouraged in the designated Employment Areas, which is explored in **Section 5.2 Employment Areas**.

The majority of proposed development projects are located within the areas targeted for growth in the Official Plan, confirming that City policies have been successful in directing growth to these key geographies. In the 2024 Q4 Development Pipeline, 79% of residential units and 54% of non-residential GFA are proposed in areas targeted for growth by the City's Official Plan (see [Table 3](#) and [Table 15](#) on pages 6 and 21); 85% of non-residential GFA is proposed in areas targeted for growth if Employment Areas are included. [Figure 3](#) breaks down the proportion of proposed residential units and non-residential GFA by Pipeline status. Nevertheless, there has been an increasing amount of development proposed outside of

Figure 3: Proposed Residential Units and Non-Residential GFA in Growth Areas







5.1.1 Downtown and Central Waterfront

Downtown and Central Waterfront At a Glance

Under Review	Active	Built	
<b>25.5%</b> <i>132 projects</i>	<b>43.1%</b> <i>223 projects</i>	<b>31.3%</b> <i>162 projects</i>	
<b>208,450 units</b>	<b>495 units</b>	<b>4,534,553 m<sup>2</sup></b>	<b>10,054 m<sup>2</sup></b>
Total Proposed Residential Units	Average number of units per project	Total Proposed Non-Residential GFA	Average Non-residential GFA per project

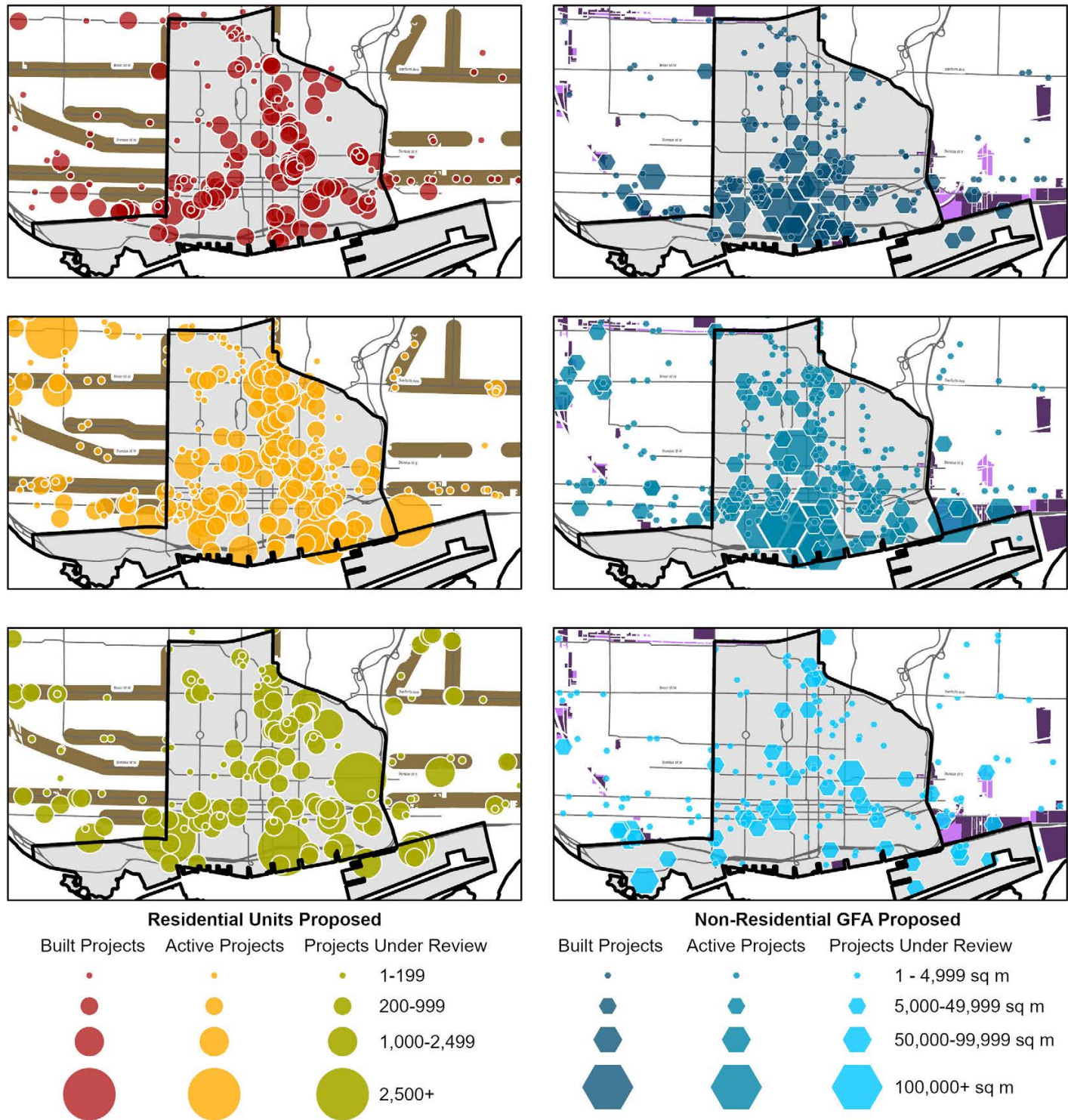
Downtown and the Central Waterfront is one of the most prominent locations for development activity in the city, containing the largest concentration of proposed residential units and non-residential GFA of any Growth Management Area. In the 2024 Q4 Development Pipeline, there are 517 projects proposing 208,450 residential units and 4,534,553 m² of non-residential GFA within Downtown and the Central Waterfront area. This comprises 22% of the total projects, 24% of the total residential units and 33% of the total non-residential GFA proposed in the entire city (see [Table 2](#), [Table 5](#), and [Table 15](#) on pages 5, 9 and 21). This concentration of growth is notable given that Downtown and the Central Waterfront make up only 3% of the city's land area.

[Map 8](#) (on page 31) 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 over time. At the same time, [Map 8](#) shows the decreasing scale and activity of non-residential projects in Downtown.

Large-scale residential projects are becoming more common across the city, including in Downtown and the Central Waterfront area. Four of the 34 largest residential projects are located Downtown and together propose over 17,000 units (see [Appendix Table A.5](#), large residential projects are those proposing 2,500 units or more). The largest residential project Downtown is 595 Front St W. Currently under review, the project proposes to deck over the rail corridor and build five towers including just under 8,000 units, approximately 37,000 m² 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, nine of the 17 projects proposing over 100,000 m² of non-residential GFA are in Downtown and the Central Waterfront area and together propose over 1,418,000 m² of non-residential GFA (see [Appendix Table A.6](#)). While most of the large non-residential projects within Downtown predominately propose office uses, other proposed non-residential uses include a hotel as part of the development at 1 Yonge Street and the expansion of Sick Kids Hospital at 555 University Avenue.

Map 8: Downtown and Central Waterfront Development Activity Status



Source: Land Use Information System II  
Development projects with activity between January 1, 2020 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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Avenges

Centres and Downtown & Central Waterfront





### 5.1.2 Centres

#### Centres At a Glance

Under Review	Active	Built	
<b>30.4%</b> <i>38 projects</i>	<b>48.8%</b> <i>61 projects</i>	<b>20.8%</b> <i>26 projects</i>	
<b>91,675 units</b>	<b>674 units</b>	<b>453,865 m<sup>2</sup></b>	<b>5,468 m<sup>2</sup></b>
Total Proposed Residential Units	Average number of units per project	Total Proposed Non-Residential GFA	Average Non-residential GFA per project

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 and major transit investments while ensuring the presence of an attractive public realm and necessary amenities.

There are 125 projects in the Development Pipeline located in the Centres or 5% of all projects, containing 11% of the city's total proposed residential units (91,675 units) and 3% of total proposed non-residential GFA (453,865 m<sup>2</sup>). Around 81% of proposed residential units (73,866) in the Centres are either under review or approved but have not yet been issued Building Permits, indicating that there is likely to be substantial residential construction in the Centres in coming years.

All four Centres contain development activity, though it is not evenly distributed. [Table 20](#) 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 non-residential GFA built. 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 (60%) and non-residential GFA (58%) under review in the Centres. Yonge-Eglinton Centre also contains a large amount of proposed non-residential GFA, however the amount proposed has decreased from the 2023 Q4 Pipeline as considerable development has already been realized.

Residential projects in the Centres are generally larger developments with an average of 674 residential units proposed per project, the highest average project size of all the growth areas (see [Table 6](#) on page 12). In comparison, the citywide average is 490 units per project and Downtown and the Central Waterfront has an average of 513 units per project. Projects located in the Centres are becoming progressively larger in scale, with Under Review projects having an average 1,195 units per project, compared to 687 for Active projects and 504 for Built projects.

Five of the 34 largest projects (those containing 2,500 residential units or more) in the Pipeline are located within the Centres (see [Appendix Table A.5](#)). Two are located in Scarborough, two are located in Etobicoke, and one is in Yonge-Eglinton.

The proposed development in the Pipeline will enable the continued intensification of all four Centres, each growing as residential and employment hubs 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 area, in terms of people and jobs per hectare (see [Appendix Table A.8](#)), and the Pipeline indicates the density level will only increase.

**Table 20: Proposed Residential Units and Non-Residential GFA in Urban Growth Centres**

	Proposed Residential Units				Proposed Non-Residential GFA			
	Under Review	Active	Built	Total	Under Review	Active	Built	Total
<b>Centres</b>	<b>41,823</b>	<b>37,763</b>	<b>12,089</b>	<b>91,675</b>	<b>169,726</b>	<b>226,347</b>	<b>57,792</b>	<b>453,865</b>
<b>Etobicoke Centre</b>	2,642	15,777	1,552	19,971	3,112	137,366	4,742	145,220
<b>North York Centre</b>	5,303	6,453	2,732	14,488	11,839	20,518	43,646	76,003
<b>Scarborough Centre</b>	24,892	4,541	250	29,683	99,310	6,832	127	106,269
<b>Yonge Eglinton Centre</b>	8,986	10,992	7,555	27,533	55,465	61,632	9,277	126,373

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, 2020 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 those which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal.

## Housing Action Plan: Avenues Policy Review

For over 20 years, Avenues have been part of the City's strategy to manage growth and accommodate intensification. The Mayor's Housing Action Plan (HAP) directed City Planning to explore opportunities to streamline study requirements for building new housing along Avenues, extend and potentially introduce new Avenues, update the vision and policy direction for how Avenues will develop, and study options for creating areas of transition between Avenues and Neighbourhoods to enable more housing. These updates leverage the Avenues as a growth management tool to help realize the vision of more inclusive and complete communities and support the objective of increasing housing supply.

City Council adopted recommendations by City Planning staff on February 5, 2025 that update the vision and policy direction, streamline study requirements, identify nearby Neighbourhoods lands for redesignation to enable the planned built form of Avenues, and introduce 283 kilometres of new Avenues.<sup>15</sup> Official Plan Amendment (OPA) 778 (Avenues Policy Review: Phase 1) has been appealed to the OLT and is not yet in effect.<sup>16</sup>

### 5.1.3 Avenues

#### Avenues At a Glance

Under Review	Active	Built	
<b>37.4%</b> <i>246 projects</i>	<b>40.4%</b> <i>266 projects</i>	<b>22.2%</b> <i>146 projects</i>	
<b>200,507 units</b>	<b>337 units</b>	<b>1,144,426 m<sup>2</sup></b>	<b>2,253 m<sup>2</sup></b>
Total Proposed Residential Units	Average number of units per project	Total Proposed Non-Residential GFA	Average Non-residential GFA per project

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. There are changes proposed to Avenues geography and policy, see the sidebar for context. This analysis is based on the Avenues geography in-force at the time of writing.

The Avenues contain the most proposed projects of any of the Growth Management Areas. These 658 projects account for 200,507 residential units and 1,144,426 m<sup>2</sup> of non-residential GFA proposed in the current Development Pipeline. This represents 31% of the total proposed projects in the city, 24% of proposed units and 8% of its proposed non-residential GFA. The large majority (89%) of the proposed residential units are in projects that are Active or Under Review. There are eight times as many units proposed as have been built in the past five years, indicating a significant increase in near-term housing supply along Avenues.

While the Avenues contain the greatest number of proposed projects compared to the other Growth Management Areas, they are generally smaller in scale. The average number of residential units proposed per

project along the Avenues is 346. However, the scale of projects along the Avenues is increasing, with Under Review projects having an average of 457 units, compared to 317 for Active projects and 185 for Built projects. Similarly, the number of large projects (proposing 2,500 residential units or more) along the Avenues is increasing. Seven of the 11 largest projects along the Avenues are under review, proposing a combined total of over 30,316 units (see [Appendix Table A.5](#)). Non-residential development along the Avenues is relatively stable compared to residential development. Along the Avenues, approximately one third of proposed non-residential GFA is Under Review, one third is Approved but not yet under construction, and one third is either under construction or Built in the past five years.

Many of the largest projects proposed along the Avenues are located on Eglinton Avenue (see [Map 2](#) on page 10), representing a response to the Eglinton Crosstown LRT. Other notable Avenue segments with large projects proposed along them are Sheppard Avenue and Yonge Street.



5.1.4 Other Mixed Use Areas

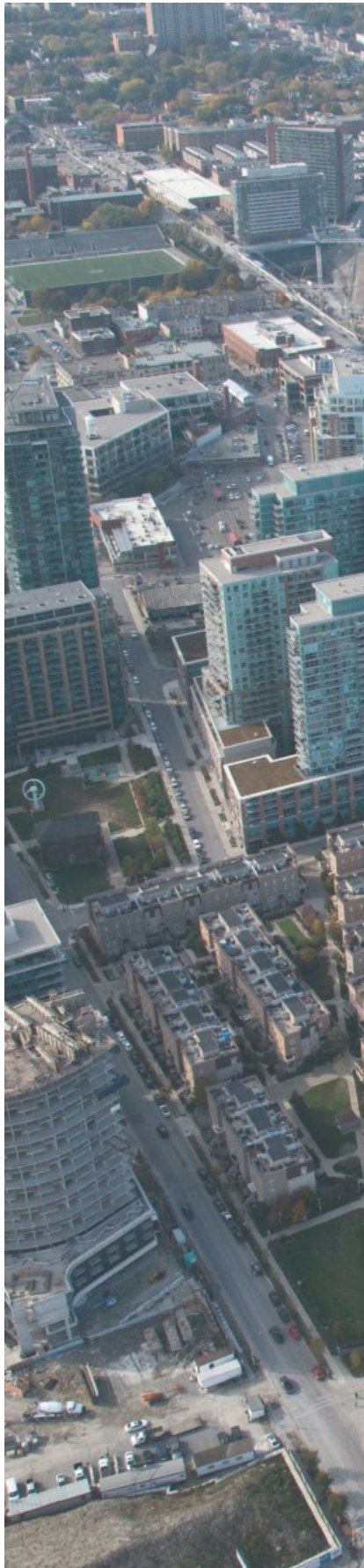
Other Mixed Use Areas At a Glance

Under Review	Active	Built	
37.8%	35.4%	26.8%	
96 projects	90 projects	68 projects	
174,190 units	616 units	1,370,293 m²	7,100 m²
Total Proposed Residential Units	Average number of units per project	Total Proposed Non-Residential GFA	Average Non-residential GFA per project

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 174,190 residential units and 1,370,293 m² of non-residential GFA proposed across 254 projects.

This accounts for 10% of the city’s total proposed projects, 20% of residential units and 10% of proposed non-residential GFA. Just under 90% of the proposed residential units in these areas are in projects that are either Under Review or Active. Similarly, 91% of the proposed non-residential development is in Active or Under Review projects. There were 11 projects in other Mixed Use Areas proposing 2,500 residential units or more, totaling over 58,700 units (see [Appendix Table A.5](#)).





### 5.1.5 All Other Areas

#### All other areas At a Glance

Under Review	Active	Built	
<b>31.6%</b> <i>247 projects</i>	<b>41.4%</b> <i>323 projects</i>	<b>27.0%</b> <i>211 projects</i>	
<b>180,076 units</b>	<b>318 units</b>	<b>6,356,137 m<sup>2</sup></b>	<b>13,669 m<sup>2</sup></b>
Total Proposed Residential Units	Average number of units per project	Total Proposed Non-Residential GFA	Average Non-residential GFA per project

There were 781 development projects proposed outside of the Growth Management Areas, accounting for 32% of the total projects in the city. All Other Areas collectively contain a total of 180,076 residential units (21% of the citywide total). Generally, these projects are infill developments in areas designated as Neighbourhoods or Apartment Neighbourhoods. While only about a third of all projects are Under Review, two thirds 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, seven are located in All Other Areas (see [Appendix Table A.5](#)). Residential projects in All Other Areas are on average smaller than projects in growth areas, with an average project size of 318 units per project.

There is 6,356,137 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. One-quarter (25%) or 1,591,136 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 815,347 m<sup>2</sup> of proposed non-residential GFA is in projects that have initiated construction.

The City has several initiatives that seek to expand as-of-right development such as Expanding Housing Options in Neighbourhoods (EHON)<sup>17</sup> and Major Streets initiatives.<sup>18</sup> The Development Pipeline captures proposed development above the Site Plan Control threshold, and therefore the development activity resulting from these initiatives designed to enable more as-of-right construction is not captured by the Development Pipeline.

## 5.2 Employment Areas

Employment Areas are vital to Toronto's economic health. Toronto's Official Plan sets out specific policies for Employment Areas in Chapters 2 and 4, which include both Core Employment and General Employment Areas (see side bar for more information). These policies provide a level of predictability in regard to land use that can help businesses make long-term investment decisions that support the city's economy and provide employment opportunities.<sup>19</sup> In the 2024 Development Pipeline there were 283 projects in Employment

Areas, containing 4,170,083 m<sup>2</sup> of non-residential GFA, or 30.1% of the total proposed non-residential GFA in the city (see [Table 21](#), and [Map 5](#) on page 22). The concentration of non-residential development in Employment Areas, which make up less than 12% of the city's land area, illustrates how the stability and certainty of these designated lands attracts new non-residential development. While the overall proposed non-residential GFA citywide has decreased slightly from 2023, the non-residential GFA proposed in Employment Areas has increased by roughly 2%.

Table 21: Proposed Development in Employment Areas by Status

	Projects		Proposed Non-Residential Gross Floor Area		
	Number	Percent	Number	Percent	
City of Toronto	1,700		13,859,274	100.0%	
<b>Total Employment Areas</b>	<b>283</b>	<b>100.0%</b>	<b>4,170,083</b>	<b>30.1%</b>	<b>100.0%</b>
Built	82	29.0%	1,105,372	26.5%	
Active	101	35.7%	1,937,623	46.5%	
Under Review	100	35.3%	1,127,088	27.0%	
<b>Total Employment Areas</b>	<b>283</b>	<b>100.0%</b>	<b>4,170,083</b>	<b>100.0%</b>	
<b>Core Employment Areas</b>	<b>164</b>	<b>58.0%</b>	<b>1,993,995</b>	<b>47.8%</b>	<b>100.0%</b>
Built	56	34.1%	925,266	46.4%	
Active	56	34.1%	574,887	28.8%	
Under Review	52	31.7%	493,842	24.8%	
<b>General Employment Areas</b>	<b>119</b>	<b>42.0%</b>	<b>2,176,088</b>	<b>52.2%</b>	<b>100.0%</b>
Built	26	21.8%	180,106	8.3%	
Active	45	37.8%	1,362,736	62.6%	
Under Review	48	40.3%	633,246	29.1%	

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

Development projects with activity between January 1, 2020 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 those which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal. Gross floor area values are expressed in square metres.

Note: This table cannot be directly compared with Tables 1, 2 and 15 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.



As of December 31, 2024, 82 development projects in Employment Areas (29%) were classified as Built, totaling 1,105,372 m<sup>2</sup> of new non-residential floor space (27% of all non-residential GFA in Employment Areas). An additional 101 projects (36%) were classified as Active, with at least one Planning approval, accounting for 1,937,623 m<sup>2</sup> of non-residential GFA (46.5%). A further 100 projects (47%) are Under Review, representing 1,127,088 m<sup>2</sup> of non-residential GFA (27%).

In other words, just over one quarter of the proposed non-residential GFA in Employment Areas has already been Built, nearly half is considered Active, and roughly one quarter is Under Review. While projects Under Review make up 36% of the total projects in Employment Areas, they represent 27% of the proposed GFA, suggesting that these projects are generally smaller.

Almost 56% of non-residential development is proposed in growth areas. If non-residential development in Employment Areas is added to the development in Downtown, the Centres, along the Avenues, and in Other Mixed Use Areas, the percentage of non-residential development occurring in an area targeted for growth rises to 85%.

If Secondary Plan areas are included, the percentage of non-residential development occurring in an area targeted for growth further increases to 96%. Employment Areas continue to provide an attractive location for development projects and are critical to the City's diverse economic structure and vitality, particularly for industrial uses. The current Pipeline contains approximately 2,195,240 m<sup>2</sup> of proposed industrial GFA across the city, about 84% of which is in Employment Areas (see [Table 22](#)). The majority of proposed industrial GFA in Employment Areas is located within Core Employment Areas (67%), while 32% 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 (63%), totaling 1,250,439 m<sup>2</sup> (see [Table 21](#) and [Table 22](#)). The remaining proposed GFA is mostly split between Institutional and Office uses. Industrial GFA in Built and Active projects represent about 51% or 1,015,542 m<sup>2</sup> of all GFA in Core Employment Areas over the last five years. An additional 234,897 m<sup>2</sup> of proposed Industrial GFA in Core Employment Areas is Under Review.

**Table 22: Proposed Industrial GFA in Employment Areas**

Area	Built	Active	Under Review	Total in Pipeline	Percent	Percent of Employment Areas
<b>City of Toronto</b>	<b>793,385</b>	<b>719,786</b>	<b>682,069</b>	<b>2,195,240</b>	<b>100.0%</b>	
<b>Employment Areas</b>	728,091	610,879	510,722	1,849,692	84.3%	<b>100.0%</b>
<b>Core Employment</b>	660,664	354,878	234,897	1,250,439	57.0%	67.6%
<b>General Employment</b>	67,427	256,001	275,825	599,253	27.3%	32.4%

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

Development projects with activity between January 1, 2020 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 those which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal. Gross floor area values are expressed in square metres.

Note: This table cannot be directly compared with Tables 1, 2 and 3 because 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.

### 5.2.1 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 adopted Official Plan Amendments (OPA) 668 and 680 which brought the plan into conformity with the amended definition of “area of employment” per Bill 97 and authorized lawfully established commercial uses and institutional uses to continue in the City’s Core Employment Areas and General Employment Areas. Subsequently, the Minister of Municipal Affairs and Housing filed Ontario Regulation 396/24 which removed City Council from being the approval authority for OPA 668 and OPA 680 and requested that the City bring forward

a new OPA that identifies employment lands to be removed. Forthcoming OPA 804 proposes to reintroduce the policies of OPAs 668 and 680 and redesignate certain lands from Employment Areas to Regeneration Areas.<sup>20</sup>

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](#)).

For the reporting purposes, only those lands designated Employment Areas as of December 31, 2024 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 mirrors those which are proposed within designated Employment Areas.

### 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.

Please note that as of April 2025, OPA 804 proposes a number of changes to the Official Plan Employment Area policies. Please check the status of OPA 804 to see the most up to date policies.



5.3 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 42 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.7](#) 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 Downtown and the Central Waterfront, the Centres, and along the Avenues. [Map 9](#) (on page 41) displays the areas of the Secondary Plans and the locations of development projects within each.

As shown in [Table 24](#), there are 1,115 projects proposed in Secondary Plan Areas, or 48% of total projects in the Pipeline. These projects propose a total of 587,361 residential units and 9,400,224 m² of non-residential GFA. This represents 69% of the total proposed residential units and 68% of

the total non-residential GFA in the city. There are more Active projects (467) than Under Review projects (349) in the Secondary Plan areas, and there are even fewer Built projects (299).

Some areas covered by a Secondary Plan are outside of Downtown, the Centres, nor along the Avenues and are not in other Mixed Use Areas. There are 87,346 residential units and 2,923,585 m² 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, along the Avenues, and in other Mixed Use Areas, then 94% of the residential units and 77% of the non-residential GFA in the Pipeline are proposed in an area targeted for growth in the Official Plan.

Table 23: Proposed Development in Secondary Plan Areas by Status

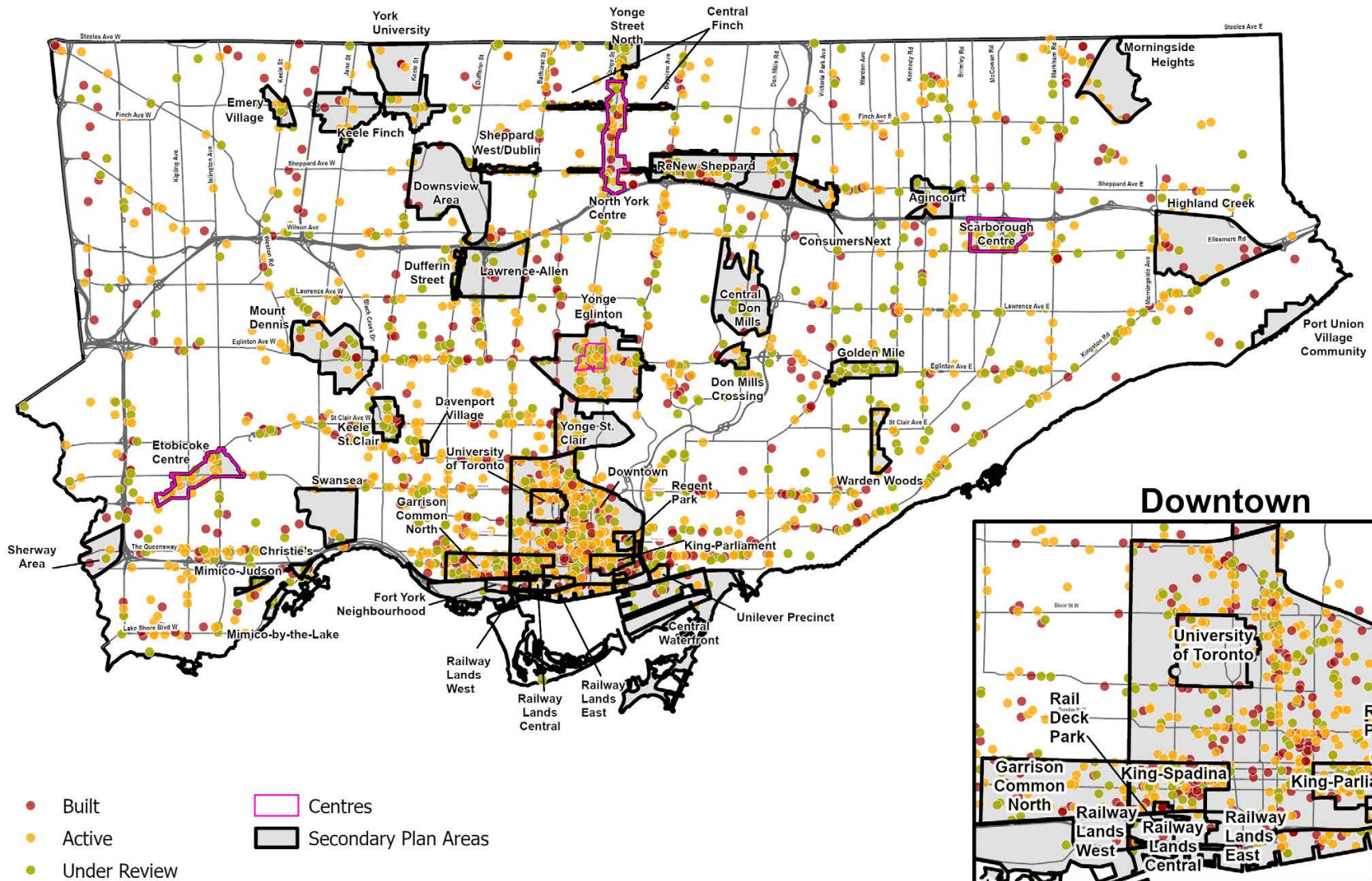
	Number of Projects	%	Proposed Residential Units	%	Proposed Non Residential GFA	%
City of Toronto	2,335	100.0%	854,898	100.0%	13,859,274	100.0%
Secondary Plans	1,115	47.8%	587,361	68.7%	9,400,224	67.8%
Under Review	349	31.3%	298,793	50.9%	3,171,636	33.7%
Active	467	-	204,921	34.9%	4,230,293	45.0%
Built	299	26.8%	83,647	14.2%	1,998,295	21.3%

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, 2020 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 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 Minister of Municipal Affairs and Housing.

## Map 9: Proposed Development in Secondary Plan Areas



Source: Land Use Information System II

Development projects with activity between January 1, 2020 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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### **5.3.1 Profiled Secondary Plan Areas**

The Renew Sheppard East Secondary Plan was approved by Council on December 18, 2024, and is currently under appeal and not in-force. This Secondary Plan builds on the 1999 Sheppard East Subway Corridor Secondary Plan. The purpose of the update was to provide for a planning framework that supports a mix of land uses and complete, livable communities. In total, 16,341 residential units and 145,470 m<sup>2</sup> non-residential GFA is proposed for the Renew Sheppard East Secondary Plan area in the 2024 Pipeline.

The Golden Mile Secondary Plan was adopted by Council in 2020 and the plan, as modified, was brought into force and effect in December 2024. The Secondary Plan aims to 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. Within the Golden Mile Secondary Plan area, there are 21 projects with a proposed total of 33,192 residential units and 190,287 m<sup>2</sup> of non-residential GFA. All projects are currently Under Review or

Active. The vast majority of proposed residential units (98%) and proposed non-residential GFA (98%) are in projects which are Under Review.

Closer to Downtown, the King-Parliament Secondary Plan provides direction on built form, the public realm and heritage assets to accommodate growth and promote new investment in the King-Parliament area. There are a total of 49 projects within the Secondary Plan area, with half of the projects being Active. Together there are 23,957 proposed residential units and 391,777 m<sup>2</sup> of non-residential GFA. Half of the projects and 40% of the proposed residential units are Active, meaning that many of the units are either approved or under construction already.

The Jane Finch Secondary Plan, in force and effect as of February 3, 2025 with limited site specific appeals, is part of a series of integrated plans to guide future growth and change in the area, supporting residents and businesses over time with the opening of the Finch West LRT. There are 6,750 proposed residential units in the Secondary Plan area, with 54,581 m<sup>2</sup> of proposed non-residential GFA within eight projects. Five of the development projects are Active and they account for 93% of proposed residential units and 38% of proposed non-residential GFA.



## 5.4 Transit Oriented Communities

The Transit Oriented Communities (TOCs) program is a Provincially-led initiative involving Infrastructure Ontario, Metrolinx, and private development partners to deliver mixed-use high-density developments that are integrated with or adjacent to major transit stations.<sup>21</sup> The City of Toronto is a critical partner in the successful delivery of TOCs, allowing the City to

advance the planning vision for growth around transit systems within Toronto.<sup>22</sup> The proposed TOCs are planned around future subway, Light Rail Transit (LRT) and GO/Smart Track stations. With the shared objectives of creating complete and accessible communities and increasing housing supply, the Province and the City are working together to provide opportunities for residents and workers to live and work near higher-order transit.<sup>23</sup>

To date, the Province has not filed applications with the City to amend municipal land use planning policies and by-laws. To account for the planned development, the Development Pipeline captures TOC projects where materials have been circulated to City staff and been made publicly available. For some older projects (e.g. Park Lawn GO Expansion), formal Planning applications and Building Permits have been submitted for the project by

**Table 24: Proposed Projects, Residential Units, and Non-Residential GFA in Transit Oriented Communities**

	Projects in Pipeline	Proposed Residential Units	Proposed Non-residential GFA	Total Proposed GFA
<b>All Transit Oriented Communities</b>	<b>25</b>	<b>31,773</b>	<b>1,183,560</b>	<b>3,512,961</b>
<b>Ontario Line</b>	<b>17</b>	<b>13,861</b>	<b>1,019,356</b>	<b>2,030,936</b>
Corktown First Parliament	2	2,410	10,670	193,538
Cosburn	2	623	3,364	48,706
East Harbour	1	4,300	926,000	1,228,000
Eastern	1	160	1,151	13,761
Exhibition	2	1,448	30,525	137,570
Gerrard-Carlaw	1	1,313	13,433	113,488
King-Bathurst	2	286	1,726	23,277
Pape	2	439	3,727	41,069
Queen-Spadina	2	217	2,799	17,475
Thornccliffe Park	2	2,665	25,961	214,052
<b>GO Transit Expansion</b>	<b>7</b>	<b>17,138</b>	<b>156,355</b>	<b>1,423,544</b>
Bloor-Lansdowne	2	799	2,223	61,461
Scarborough GO	1	6,619	20,482	510,105
Mimico GO	2	2,078	9,006	143,458
Park Lawn GO	2	7,642	124,644	708,520
Front-Spadina GO	0	-	-	-
Highway 27 – Woodbine GO	0	-	-	-
<b>Scarborough Subway Extension</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.

Note 1: Proposed residential units and non-residential GFA in development projects with activity between January 1, 2020 and December 31, 2024. Gross floor area values are expressed in square metres.

\*Note 2: There are ongoing negotiations regarding the non-residential GFA proposed in the East Harbour TOC. The values in this table reflect the outcome of negotiations as of June 4, 2024.



the private development proponent. These projects represent the top-down land use planning direction set by the Province for each site and may not necessarily have formal Planning applications associated with them as yet. Transit station projects are also included in the analysis where the station itself requires a Site Plan Control application.

There are 17 TOCs within Toronto, 15 of which have at least one development project associated with them in the Development Pipeline. Front-Spadina GO and Highway 27 – Woodbine GO Station are the only two TOCs where a development concept has not yet been circulated and thus there are no projects in the Development Pipeline as of yet. The City is working with the Province and Woodbine Entertainment Group to develop a planning framework to guide development within the future TOC.<sup>24</sup>

In total, there are 25 development projects within the TOCs which account for approximately 31,770 units and 3.5 million m<sup>2</sup> of GFA, including

1,183,560 m<sup>2</sup> of non-residential GFA (see [Table 24](#)). Six of the projects within TOCs are now Active (Bloor-Lansdowne, Corktown First Parliament, East Harbour, King-Bathurst, Mimico GO), meaning that at least one Planning approval has been issued, while the remainder are Under Review (see [Table 25](#)).

The objective of TOCs is to create complete communities, thus there is a mix of uses proposed across all TOCs. Residential uses account for 66% of the total proposed GFA, while office uses account for 28%, retail uses account for 3%. Industrial, institutional and other uses together account for 2%, which primarily represent the transit station.

As the Provincial transit and development projects within TOCs advance, and more Planning applications are submitted, the composition of development may evolve, in particular, the amount of proposed office space, given the recent shifts in this market.

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

Pipeline Status	Projects in Pipeline	Proposed Residential Units	Proposed Non-residential GFA	Total Proposed GFA
<b>Under Review</b>	19	25,037	251,336	2,110,927
<b>Active</b>	6	6,736	932,224	1,402,034

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, 2020 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 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.

# 6.0 The City of Toronto and Provincial Planning Policies

## 6.1 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 that growth.

### ***A Place to Grow: Growth Plan for the Greater Golden Horseshoe***

("the Growth Plan") was introduced in 2006 to manage the growth and development throughout the region that stretches around Lake Ontario from Niagara Falls to Peterborough, with Toronto at its centre. On August 28, 2020, the Province released an amended Growth Plan, eliminating the 2031 and 2041 forecast years and replacing them with forecasts for 2051.

On October 20, 2024 the **Provincial Planning Statement** (PPS) replaced the **Provincial Policy Statement**, 2020 and withdrew Toronto from the area of ***A Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2019***.<sup>25</sup>

The intent of the new PPS is to have a streamlined province-wide land use planning policy framework that provides municipalities with the tools and flexibility they need to build more homes.

Section 2.1.1 of the PPS directs Ontario Municipalities to base population and employment growth forecasts on the Ontario Population Projections published by the Ministry of Finance, replacing the forecasts included in the Growth Plan. Section 2.1.2 of the PPS states that municipalities may continue to forecast growth using population and employment forecasts previously issued by the Province for the purposes of land use planning.<sup>26</sup> The Province introduced Bill 17, *Protect Ontario by Building Faster and Smarter Act*, 2025, on May 12, 2025. The proposed legislation would require large and fast-growing municipalities

to update their Official Plans at their next review under the Planning Act to align with the Ministry of Finance's 2024 population projections.<sup>27</sup> At the time of writing, the City's Official Plan continues to use the population and employment forecasts of the Growth Plan 2020 as supported by background research by Hemson Consulting Ltd. (Hemson).<sup>28</sup>

## 6.2 Population Forecast

The underlying technical forecast study to Amendment 1 of the Growth Plan was prepared by Hemson and released in August 2020 in response to uncertain growth trends brought on by the COVID-19 pandemic. 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, a 2021 forecast population of 3,034,000, and a 2051 forecast population of 3,651,000. 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.

On October 1, 2024, Ontario's Ministry of Finance released population projections for 2023 to 2051. The projections anticipate Toronto reaching a population of 4,191,286 by 2051, approximately 540,000 persons higher than Hemson's forecast.

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 1, 2021 is 2,917,666, as estimated in January 2025, which is about 4%, or 116,300 persons, below the revised forecast supporting the Growth Plan.<sup>29</sup>

While the City was on track with the forecasts supporting the Growth Plan as amended, disruptions caused by the COVID-19 pandemic 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 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 1, 2024 is 3,273,119.<sup>30</sup> This is population growth of more than 355,000 people over the three-year period from 2021, and almost 138,000 persons higher than the Reference Scenario interpolated to 2025 of 3,135,200, and 112,619 higher than Hemson projected for 2026 in their revised forecast (3,160,500). As such, Toronto is now growing faster than the forecast supporting the Growth Plan as amended. Toronto's 2024 population, as estimated by Statistics Canada, is equal to 101% of the Ministry of Finance's 2024 Projection for the City's population for 2024, indicating the city is on track with the Ministry's latest projection.

## 6.3 Employment Forecast

The Growth Plan, as amended on August 28, 2020, contains a 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 2024 Toronto Employment Survey,<sup>31</sup> the City saw an increase in employment from 2023 of 65,010 jobs or 4.2%,<sup>32</sup> following growth of 3.4% in 2023,<sup>33</sup> 2.3% in 2022,<sup>34</sup> virtually no growth in 2021, and a decline in employment of 8% or 119,890 jobs between 2019 and 2020.<sup>35,36,37</sup> The city has now regained all jobs lost during the first year of the COVID-19 pandemic. This supports the expectations used in the 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>38</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 2014 to 2024, Toronto’s employment grew by 21,591 per annum, or two times the rate of growth anticipated by the Growth Plan forecasts. To date, the City is still growing faster than forecasted and remains on track to reach the Growth Plan forecast before 2051.

## 6.4 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 also completed in 2020. The Reference Forecast of that study anticipates 495,000 households need to be accommodated over the 40-year period from 2011 to 2051. To accommodate the additional households, more housing must

**Table 26: Growth Plan Forecast**

		Potential Supply (Units)	%	Potential Supply Less Estimated Demolitions	%
Hemson Forecast, Reference Scenario	2011 - 2051	495,800	100.0%	495,800	100.0%
CMHC Completions	May 2011 - 2024	239,316	48.3%	218,017	44.0%
Active Units	2020 - 2024	307,056	61.9%	279,728	56.4%
Under Review Units	2020 - 2024	432,376	87.2%	393,895	79.4%
<b>Total Units</b>		<b>978,748</b>	<b>197.4%</b>	<b>891,639</b>	<b>179.8%</b>
Additional Potential / Shortfall		482,948	97.4%	395,839	79.8%

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, 2020 and December 31, 2024 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.

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 13). The demolition rate can be applied to the potential housing supply to estimate the net supply (see [Table 26](#)).

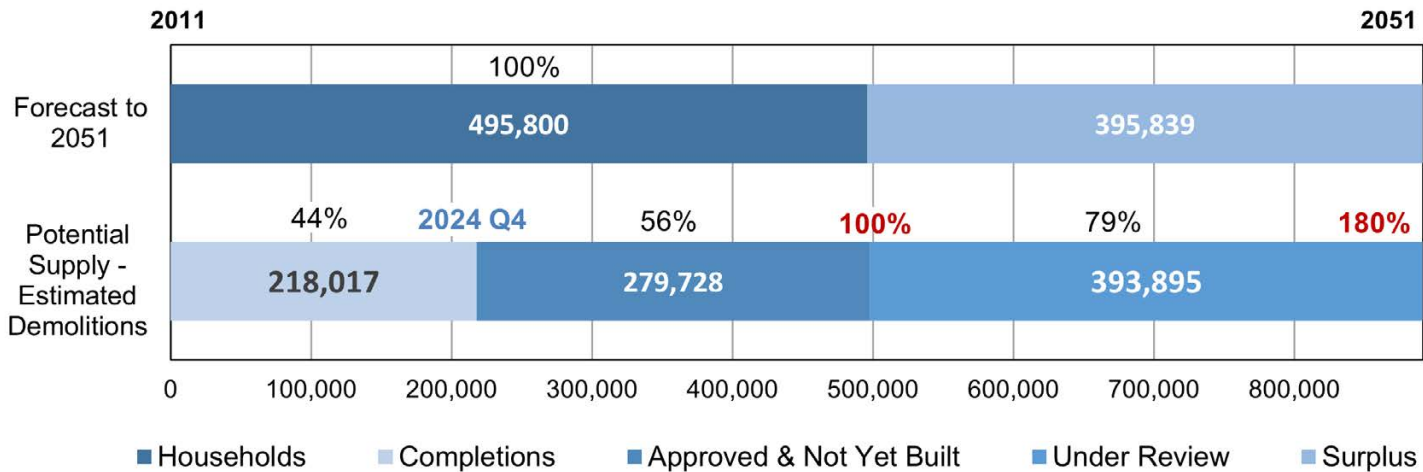
Just 13 years into the forty-year forecast period, Toronto has built or has had proposed more than enough potential housing, less estimated demolitions, to accommodate the forecasted growth to 2051. The total potential housing supply of units built, approved and still under review since 2011 is over 978,000 residential units.

CMHC reports that 239,316 units were completed between May 2011 and December 31, 2024 for a net total of 218,017 units. The Development Pipeline contains 307,056 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 279,728 units. Together this is 100% of the net units required to accommodate the forecasted growth over forty years. A further 432,376 units are in development projects still under review for an estimated added net new supply of 393,895 units or a further 79% of the forecasted growth. Together this represents 180% of the units required to accommodate the forecasted household growth to 2051 (see [Figure 4](#)).

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 development project by submitting Building Permit applications or initiating construction. However, given these trends, there is more than enough potential supply in the Development Pipeline to accommodate the forecasted growth, and Toronto is well on its way to housing the population forecasted by the Growth Plan as amended.

Figure 4: Growth Plan Forecast to 2051





Unlike the Growth Plan, the Ministry of Finance has not published a household projection corresponding to its population projection. In order to evaluate the Development Pipeline’s potential to accommodate the future housing demand under the Ministry of Finance’s population projection, City Planning staff estimated the 2051 projected households using the same methodology employed for the City’s Land Needs Assessment, 2023.<sup>39</sup> It is estimated that under the Ministry of Finance’s 2024 projections that by 2051, 825,729 additional households would need to be accommodated. Accounting for demolitions, the 2024 Q4 Development Pipeline contains enough units to accommodate 99% of the projected households corresponding to the Ministry of Finance 2022 projections (see [Table 27](#) and [Figure 5](#)). In Addition, units constructed through as-of-right development, which is not captured

by the Development Pipeline, will also contribute to accommodating the projected demand. However, reaching the target depends on not just the necessary number of units being approved by the City but also the construction and delivery of the units in time to meet the expected demand.

### 6.5 Potential Population

There are 279,728 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 579,000 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 3.5 million or 95.9% of

the forecasted 2051 population of the forecasts supporting the Growth Plan. If the 393,895 net new units which were still Under Review as of December 31, 2024 were also approved, built and similarly occupied (already having accounted for estimated demolitions), the potential population in these additional units could be about 815,400 people.

In total, the Development Pipeline could represent a potential population of 1,394,000 people.<sup>40</sup> This would be the equivalent of growing Toronto’s population by over 44%. Added to the 2021 population, the Development Pipeline if realized would contribute to a city population of about 4.31 million or 118% of the 2051 population forecast of 3.65 million contained in the Provincial Growth Plan as amended; this is also equal to 103% of Ministry of Finance’s 2024 projection.

Table 27: Ministry of Finance 2024 Projections at 2051

		Potential Supply (Units)	%	Potential Supply Less Estimated Demolitions	%
Ministry of Finance	2016 - 2051	825,729	100.0%	825,729	100.0%
CMHC Completions	2016 - 2024	159,101	19.3%	144,941	17.6%
Active Units	2020 - 2024	307,056	37.2%	279,728	33.9%
Under Review Units	2020 - 2024	432,376	52.4%	393,895	47.7%
<b>Total Units</b>		<b>898,533</b>	<b>108.8%</b>	<b>818,564</b>	<b>99.1%</b>
Additional Potential / Shortfall		72,804	8.8%	-7,165	-0.9%

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, 2020 and December 31, 2024 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.

6.6 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 28, 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>41</sup> A specific start and end date to measure the target has not been stated by the Province; for its own tracking purposes City Planning has selected the start date of January 1, 2022, to correspond with the Building Faster Fund, and the end date of December 31, 2031.

If the average annual rate of 19,645 unit completions between 2020 and 2024 continued from 2025 to 2031, an estimated 137,514 units would be constructed, which along with the 60,678 units completed between 2022 and 2024, as reported by CMHC, would be a total of 198,192 units, or 70% of the target. At this rate, Toronto would reach the goal of constructing 285,000 units by approximately 2035, four years late beyond the Province's target. To reach the 2031 target, the annual rate of completions would have to increase over 60% and approximately 32,046 units would need to be completed annually from 2025 to 2031.

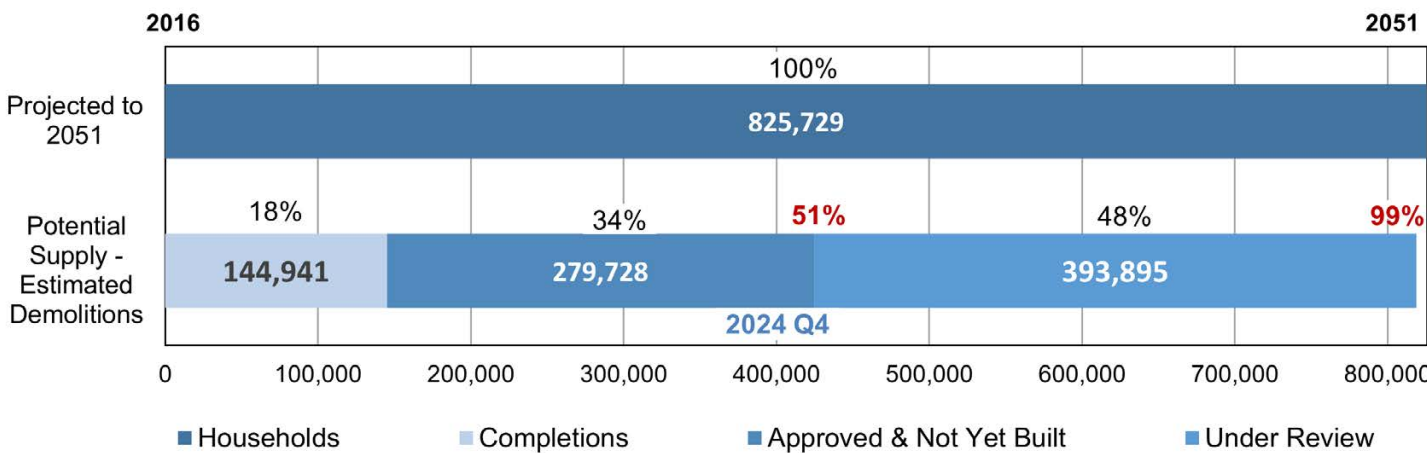
There is potential within the Development Pipeline to meet the target as set out by the *More Homes Built Faster Act*. Achieving the target will depend on the timing of construction and delivery of these units, as well as the continued

submission of new development proposals.

6.7 City of Toronto's 2024 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 *exceeded* its 2023 target of 20,900 starts by 51% and in 2024 reached 85% of the targeted 23,750 starts. Within the 2024 Development Pipeline there are more than enough residential units approved in projects that have not started construction to meet the 2025 target of 28,500 starts, however, current market conditions will make it challenging to do so.

Figure 5: Ministry of Finance 2024 Projection to 2051



# 7.0 Special Topics

## 7.1 Growing Up Guidelines

In 2020, City Council adopted the Growing Up: Planning for Children in New Vertical Communities Urban Design Guidelines (“the Guidelines”), encouraging private developers to build family-friendly units, defined as large units containing two or more bedrooms.<sup>42</sup> The Guidelines recommend that mid- and high-rise residential buildings with 20 or more units provide a minimum of 25% of its total residential units as large units that are suitable for families; at least 10% of units should be three bedrooms or greater, and at least 15% should be two-bedroom units.<sup>43</sup> Meeting the recommended residential unit breakdown of the Guidelines follows the vision for a diverse range of housing choices for all, set out in Chapter 1 of Toronto’s Official Plan.

Based on information submitted by applicants, the large majority of the

proposed units in the Development Pipeline are within projects with mid- and high-rise buildings. [Table 28](#) provides a breakdown of proposed unit types by number of bedrooms where this information has been provided by the applicants. Of the 726,635 units where the Guidelines apply, most proposed units (61%) are in the form of studio or one-bedroom apartments, with the remaining 39% having two or more bedrooms (see [Table 28](#)). These proportions mirror the breakdown of units in the Development Pipeline in its entirety where unit types are known. Additionally, there are 51,195 residential units, 7% of units proposed, for which the breakdown has not yet been provided by the applicant for units within projects with mid- and high-rise buildings, where the Guidelines are expected to apply. 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.

**Table 28: 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 Proposed Residential Units
<b>City of Toronto</b>	<b>49,901</b>	<b>396,257</b>	<b>207,537</b>	<b>72,940</b>	<b>726,635</b>
<b>Under Review</b>	22,602	191,754	89,876	34,887	<b>339,119</b>
<b>Active</b>	20,755	147,950	80,128	29,683	<b>278,516</b>
<b>Built</b>	6,544	56,553	37,533	8,370	<b>109,000</b>
<b>% of Total</b>	<b>6.9%</b>	<b>54.5%</b>	<b>28.6%</b>	<b>10.0%</b>	<b>100.0%</b>
<b>Under Review</b>	6.7%	56.5%	26.5%	10.3%	100.0%
<b>Active</b>	7.5%	53.1%	28.8%	10.7%	100.0%
<b>Built</b>	6.0%	51.9%	34.4%	7.7%	100.0%

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

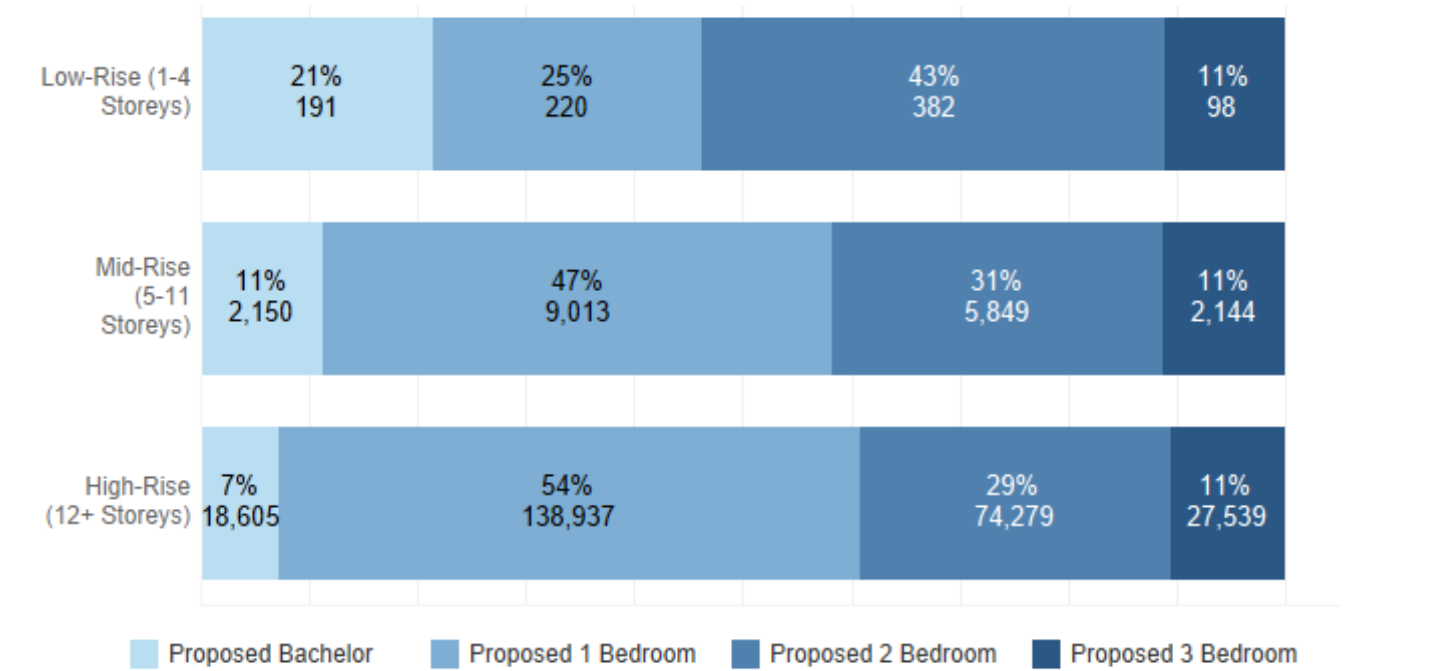
Proposed residential units in development projects with activity between January 1, 2020 and December 31, 2024. Built projects are those which became ready for occupancy and/or were completed. Active projects are those which have been approved, for which Building Permits have been applied or have been issued, and/or those which are under construction. Projects under review are those which have not yet been approved or refused and those which are under appeal.

An analysis of the Active projects gives more specific insight into the near-term future, as these are projects which have at least one planning approval. In Active projects proposing residential units in mid- and-high-rise apartment buildings (see [Figure 6](#)), roughly 30% of proposed units are two-bedroom units, and 11% are 3-bedroom units, amounting to 109,811 large-units that could be on the market in the near future.

Based on the 2024 Q4 Development Pipeline, nearly three-quarters of Active projects are exceeding the Guidelines' targets for unit mix, while less than 5% are not meeting any of the target minimums (see [Figure 7](#)). Since the Guidelines were put in place in 2020, the number of projects exceeding the targets has increased by 20%, amounting to 309,834 large units entering the market. During the same timeframe, the number

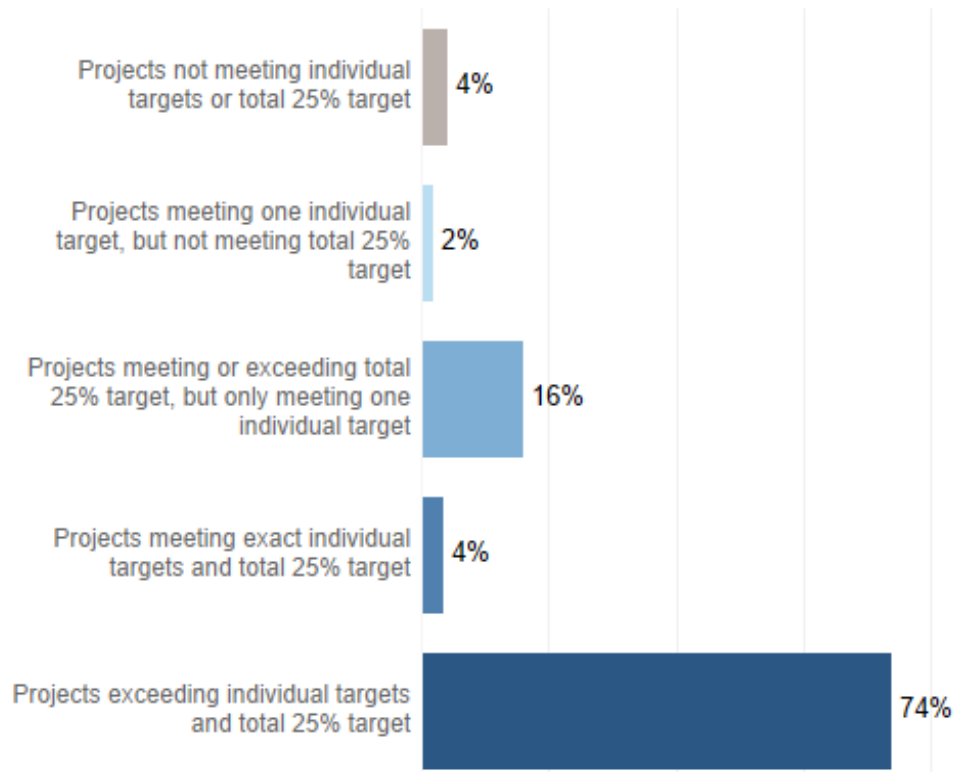
of projects not meeting any of the Guideline's minimums has decreased by roughly 1%. The increase in the number of development projects meeting the Guidelines suggests the Guidelines have been effective in prompting developers to create larger units. Since the Guidelines were put in place, the number of two or more bedroom units in Active projects has increased by 112%, again pointing to the positive effect the Guidelines have had on encouraging developers to include larger units in their projects. [Figure 8](#) shows the number of projects exceeding the Guidelines over that time frame and the corresponding number of large units.

**Figure 6: Number and Proportion of Bedrooms in Active Apartment Projects, by Bedroom Type and Height of Tallest Proposed Building**

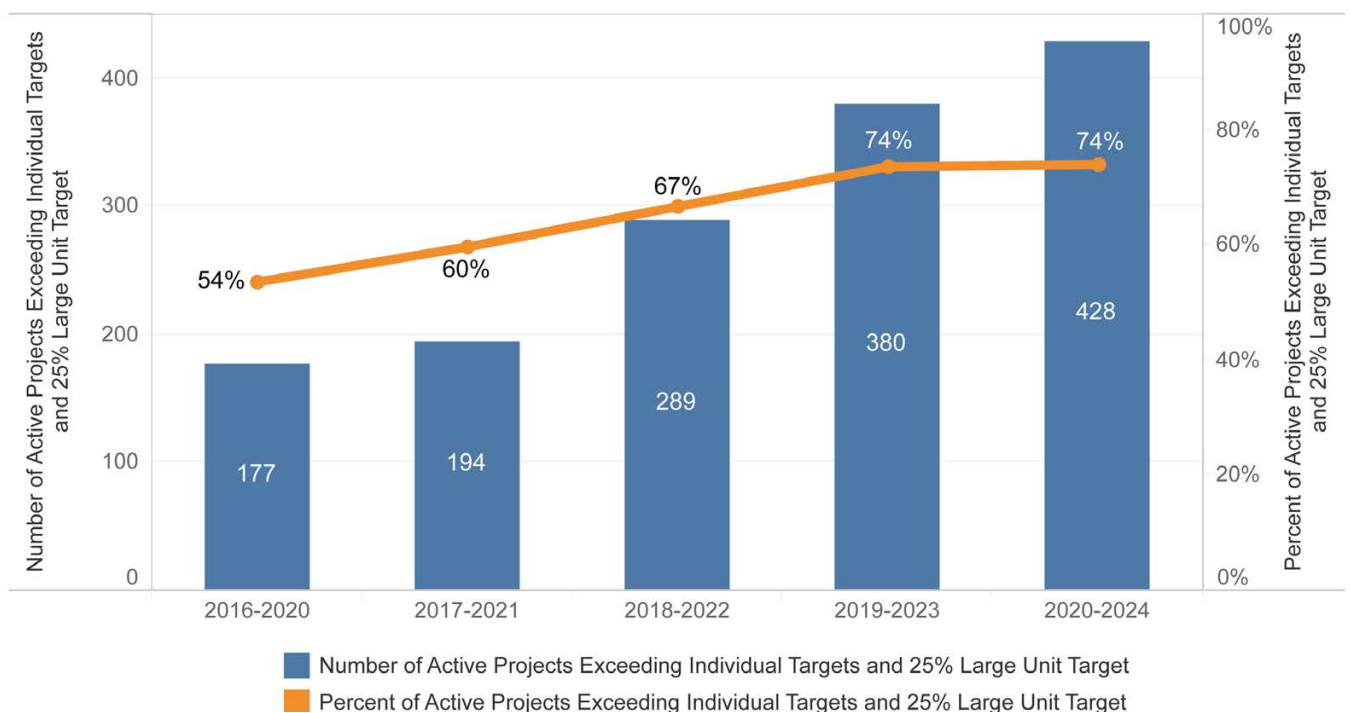




**Figure 7: Proportion of Active Residential Projects in Mid- and High-Rise Buildings Meeting the Growing Up Guideline's Target Unit Mix**



**Figure 8: Percent of Pipeline Projects Exceeding the Guidelines Targets and the Corresponding Number of Units**



## 7.2 Removal of Residential Parking Minimums

The City of Toronto has been advancing efforts to better manage auto dependency, and to achieve adequate and equitable parking supply across the city. As part of these efforts, in 2021, the City removed minimum parking requirements for new residential developments. Parking minimums are regulations that require developers to include a certain number or ratio of parking spaces in both non-residential and residential developments. Parking minimum requirements can contribute to higher construction costs, inefficient land use, and auto-dependency.<sup>44</sup> The removal of these requirements reflects a shift toward supporting broader City objectives, including encouraging transit-oriented development, reducing housing costs and supporting climate and sustainability goals. The thoughtful management of the City’s parking supply can contribute to addressing these challenges while still providing parking where it is needed.

In 2021, City Council directed City Planning to review the parking standards in the City-wide Zoning By-Law 569-2013.<sup>45</sup> As a result, on December 15, 2021 City Council approved the removal of parking minimum requirements for new

developments across the city. Before the amendment, By-Law 569-2013 required developments to provide parking spaces at different ratios dependant on unit size and project location. For example, in Policy Area 1 (the downtown core) parking requirements warranted 0.3 spots for every studio unit, 0.5 spots for every one-bedroom unit, 0.8 spots for every two-bedroom unit, and 1 spot for every unit with three or more bedrooms. Applicants often sought approval for parking figures below the By-Law minimums. The new regulation came fully into force July 22, 2022. Later amendments updated the accessible parking and bicycle standards.<sup>46</sup>

The Development Pipeline captures parking space counts for development projects at all stages of development, when provided by applicants. Analysis of this data shows that the citywide resident parking per unit ratio had already been steadily declining in the years leading up to the City’s December 2021 decision to remove parking minimum requirements. This trend demonstrates that shifts in development patterns were already underway prior to regulatory changes. The removal of parking minimums is aligned with both observed development trends and stakeholder feedback and aims to support flexible growth in areas throughout the city.

Table 29: Resident Parking to Unit Ratio by Pipeline Status and Year Application Received

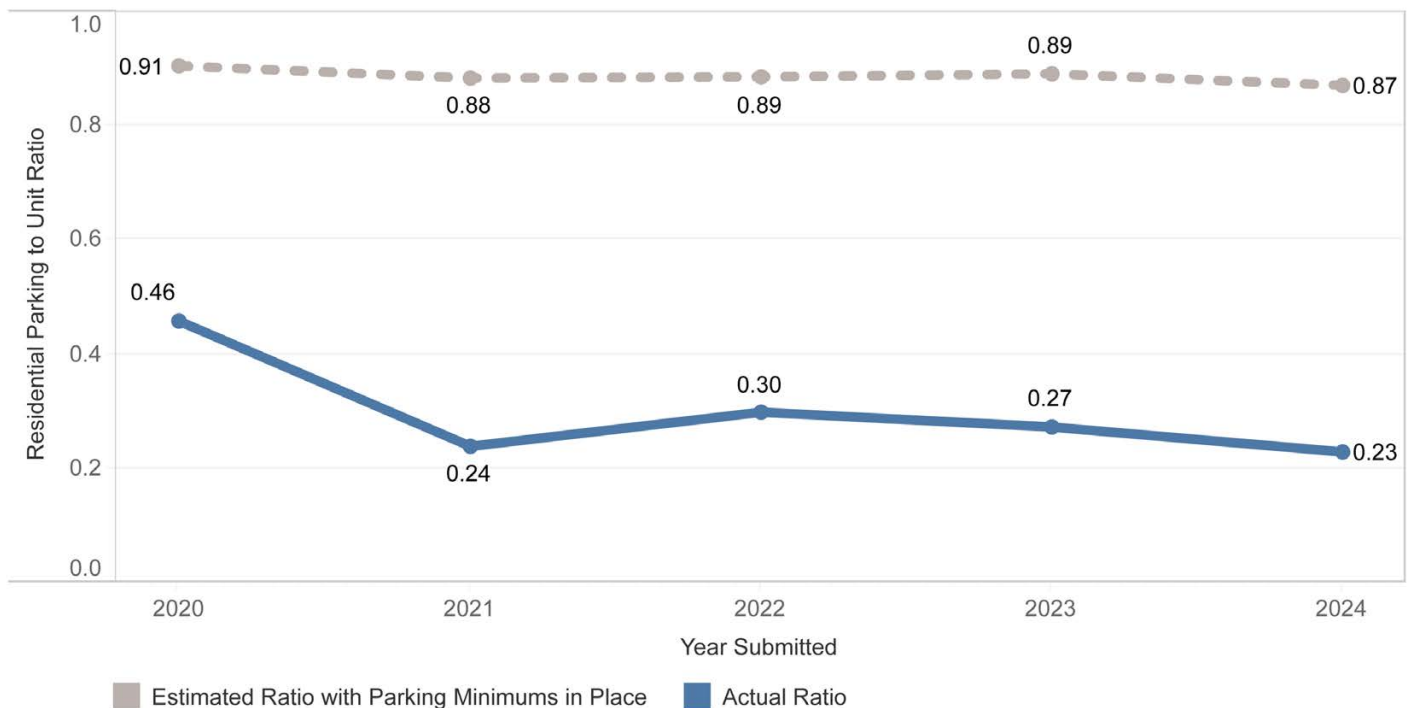
	2020	2021	2022	2023	2024
City of Toronto	0.46	0.24	0.30	0.27	0.23
Under Review	0.49	0.23	0.32	0.33	0.23
Active	0.41	0.26	0.23	0.11	0.26
Built	0.22	0.60	-	-	-

The parking ratios in [Table 29](#) indicate the number of residential parking spaces provided per residential unit for developments submitted between January 1, 2020 and December 31, 2024 categorized by Pipeline Status. The ratios are calculated based on the most recent residential unit and parking total statistics provided by applicants. As such, calculations are subject to change, and in some cases parking is recorded as zero even though residential parking is expected to be proposed as the project proceeds through the development process.

243,165 parking spaces have theoretically been forgone from proposed developments submitted between 2020 and 2024; however this assumes the application of the former parking minimums, which as noted above, were often amended and reduced through the planning approvals process.

**Figure 9** visualizes the changing resident parking to unit ratios across by year of submission, alongside a comparison to estimated ratios had the previous parking minimum requirements remained in place. As a result of the removal of residential parking minimums, an estimated

**Figure 9: City of Toronto Resident Parking to Unit Ratios by Year Application Received**



Resident Parking to Unit Ratios have generally been declining since 2020, with a clear decrease for projects that were proposed between 2020 and 2021 for Active projects and projects Under Review. **Table 30** indicates a similar decline in parking ratios in Active projects approved in 2021 versus 2022. These patterns suggest a correlation between the declining ratios and the City’s decision to eliminate parking minimums. Projects submitted in 2020 and 2021, but approved in later years, have had the opportunity to adjust proposed parking supply in response to the removed minimums.

A look at the Resident Parking to Unit Ratio for Active and Built Projects by the year of first Planning approval demonstrates a clear, though minor, decline in allocated residential parking following the removal of parking minimum requirements. The ratio for Active projects dropped from 0.56 parking spaces per residential unit in 2021 to 0.35 parking spaces per residential unit in 2022. The ratio of Built projects peaks at 0.58 parking spaces per residential units reflects that many projects were already approved under the previous parking requirements.

**Map 10** illustrates the declining parking ratios citywide, highlighting that the majority of projects have parking ratios below 1.0 parking space per residential unit. In highly transit-accessible areas like Downtown and the Central Waterfront, most projects have very low parking ratios (0.0 - 0.5). A review

of the Planning Rationales and Cover Letters of proposed projects supports this trend. Applicants frequently cited proximity and connectivity to transit as justification for proposing little, or no, residential parking. These instances were prevalent in documents submitted both before and after the decision to remove parking minimums.

In contrast, some projects along major streets, particularly those further from the downtown core in Etobicoke, North York and Scarborough, are showing slightly higher ratios of parking. These higher parking ratios reflect that relevant residential parking is being proposed in areas that are less well served by transit, which aligns with the City’s objective to strategically manage parking supply based on local context. While the overall growth of the City’s parking supply is reducing, parking is still being provided where market demand and accessibility warrant.

Based on the current trends captured within the Development Pipeline, the reduction in residential parking spaces per unit suggests that developers are adapting projects to Toronto’s evolving housing and mobility landscape. Projects submitted since Council’s decision to remove parking minimums show lower parking ratios, particularly in highly transit-accessible areas. As the City’s transit network develops and more planning applications are completed and submitted, the full impact of the removal of parking minimums will become clearer citywide.

**Table 30: Resident Parking to Unit Ratio for Active and Built Projects by Planning Approval Year**

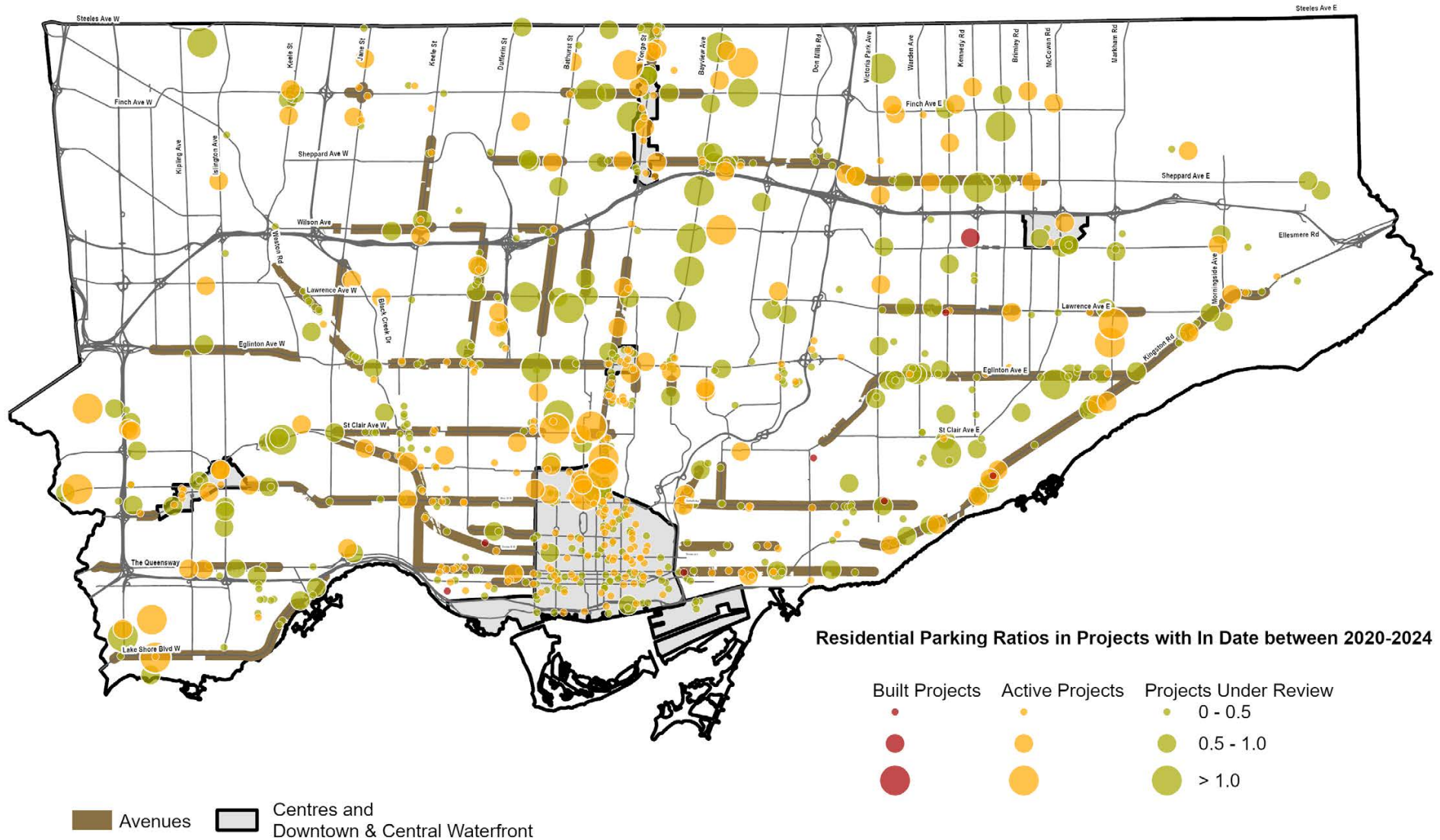
	2020	2021	2022	2023	2024
Active	0.44	0.56	0.35	0.32	0.25
Built	0.51	0.54	0.58	-	-

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

Development projects with activity between January 1, 2020 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 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 10: Residential Parking Ratios



Source: Land Use Information System II

Development projects with activity between January 1, 2020 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.

Prepared by: Toronto City Planning Division, Planning Research and Analytics - June, 2025

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# Appendix

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

Year	Freehold	Condo	Rental	Total	Condo %
2010	1,286	10,923	879	13,088	83%
2011	1,449	14,568	804	16,850	86%
2012	1,528	9,961	1,985	13,474	74%
2013	1,735	11,126	1,681	14,542	77%
2014	1,573	7,777	201	9,551	81%
2015	1,368	28,017	1,364	30,749	91%
2016	1,505	13,428	1,090	16,027	84%
2017	1,849	11,507	815	14,171	81%
2018	1,798	11,816	2,472	16,086	73%
2019	1,559	9,724	3,310	14,593	67%
2020	1,247	13,315	2,714	17,276	77%
2021	1,052	15,994	3,224	20,270	79%
2022	983	13,194	2,119	16,296	81%
2023	1,217	14,076	4,979	20,272	69%
2024	1,472	18,059	4,579	24,110	75%
<b>Avg 10 yrs (2015-2024)</b>	<b>1,405</b>	<b>14,913</b>	<b>2,667</b>	<b>18,985</b>	<b>79%</b>
<b>Percentage</b>	<b>7%</b>	<b>79%</b>	<b>14%</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 & Other	Total
2010	849	166	230	11,843	<b>13,088</b>
2011	865	82	558	15,345	<b>16,850</b>
2012	877	230	457	11,910	<b>13,474</b>
2013	1,013	172	685	12,672	<b>14,542</b>
2014	1,205	136	456	7,754	<b>9,551</b>
2015	1,124	106	193	29,326	<b>30,749</b>
2016	1,250	108	296	14,373	<b>16,027</b>
2017	1,384	92	577	12,118	<b>14,171</b>
2018	1,039	140	876	14,031	<b>16,086</b>
2019	1,057	66	701	12,769	<b>14,593</b>
2020	1,009	70	124	16,073	<b>17,276</b>
2021	774	66	319	19,111	<b>20,270</b>
2022	698	92	280	15,226	<b>16,296</b>
2023	868	88	128	19,188	<b>20,272</b>
2024	961	80	515	22,554	<b>24,110</b>
<b>Avg 5 yrs (2020-2024)</b>	<b>862</b>	<b>79</b>	<b>273</b>	<b>18,430</b>	<b>19,645</b>
<b>Percentage</b>	<b>4.4%</b>	<b>0.4%</b>	<b>1.4%</b>	<b>93.8%</b>	<b>100%</b>

Source: Housing Now publications, Canada Mortgage and Housing Corporation

**Table A.3: Average Project and Unit Size by Year Submitted**

Year	Average # of Units Per Project	Average Unit Size (m <sup>2</sup> )
2014	200	78
2015	274	76
2016	318	77
2017	277	73
2018	190	75
2019	323	74
2020	348	73
2021	639	53
2022	434	69
2023	402	67
2024	417	68

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

Development projects with activity between January 1, 2020 and December 31, 2024.

**Table A.4: Proposed Non-Residential GFA in the City of Toronto by Use and Status**

<b>Retail</b>						
<b>GFA</b>	<b>Built</b>	<b>Active</b>	<b>Under Review</b>	<b>Total in Pipeline</b>	<b>% of Total</b>	<b>% of Growth Areas</b>
<b>City of Toronto</b>	<b>584,981</b>	<b>955,591</b>	<b>1,092,229</b>	<b>2,632,801</b>	<b>100.0%</b>	
<b>Growth Areas</b>	<b>361,167</b>	<b>733,122</b>	<b>951,419</b>	<b>2,045,708</b>	<b>77.7%</b>	100.0%
Downtown and Central Waterfront	190,433	331,177	206,958	728,568	27.7%	35.6%
Centres	26,296	49,251	77,992	153,539	5.8%	7.5%
Avenues	79,574	178,265	244,872	502,711	19.1%	24.6%
Other Mixed Use Areas	64,864	174,429	421,597	660,890	25.1%	32.3%
All Other Areas	223,814	222,469	140,810	587,093	22.3%	
<b>Office</b>						
<b>GFA</b>	<b>Built</b>	<b>Active</b>	<b>Under Review</b>	<b>Total in Pipeline</b>	<b>% of Total</b>	<b>% of Growth Areas</b>
<b>City of Toronto</b>	<b>1,083,729</b>	<b>2,760,439</b>	<b>894,093</b>	<b>4,738,261</b>	<b>100.0%</b>	
<b>Growth Areas</b>	<b>999,529</b>	<b>1,657,426</b>	<b>555,067</b>	<b>3,212,022</b>	<b>67.8%</b>	100.0%
Downtown and Central Waterfront	943,237	1,296,186	246,400	2,485,823	52.5%	77.4%
Centres	28,886	119,477	63,162	211,525	4.5%	6.6%
Avenues	7,990	88,980	57,710	154,680	3.3%	4.8%
Other Mixed Use Areas	19,416	152,783	187,795	359,994	7.6%	11.2%
All Other Areas	84,200	1,103,013	339,026	1,526,239	32.2%	
<b>Industrial</b>						
<b>GFA</b>	<b>Built</b>	<b>Active</b>	<b>Under Review</b>	<b>Total in Pipeline</b>	<b>% of Total</b>	<b>% of Growth Areas</b>
<b>City of Toronto</b>	<b>793,386</b>	<b>719,786</b>	<b>682,069</b>	<b>2,195,241</b>	<b>100.0%</b>	
<b>Growth Areas</b>	<b>49,387</b>	<b>95,562</b>	<b>129,296</b>	<b>274,245</b>	<b>12.5%</b>	100.0%
Downtown and Central Waterfront	34,678	44,438	43,504	122,620	5.6%	44.7%
Centres	0	0	0	0	0.0%	0.0%
Avenues	974	33,180	66,984	101,138	4.6%	36.9%
Other Mixed Use Areas	13,735	17,944	18,808	50,487	2.3%	18.4%
All Other Areas	743,999	624,224	552,773	1,920,996	87.5%	
<b>Institutional and Other</b>						
<b>GFA</b>	<b>Built</b>	<b>Active</b>	<b>Under Review</b>	<b>Total in Pipeline</b>	<b>% of Total</b>	<b>% of Growth Areas</b>
<b>City of Toronto</b>	<b>871,136</b>	<b>1,401,929</b>	<b>905,900</b>	<b>3,178,965</b>	<b>100.0%</b>	
<b>Growth Areas</b>	<b>458,837</b>	<b>945,151</b>	<b>567,167</b>	<b>1,971,155</b>	<b>62.0%</b>	100.0%
Downtown and Central Waterfront	321,562	585,294	290,684	1,197,540	37.7%	60.8%
Centres	2,610	57,619	28,571	88,800	2.8%	4.5%
Avenues	112,792	227,501	45,601	385,894	12.1%	19.6%
Other Mixed Use Areas	21,873	74,737	202,311	298,921	9.4%	15.2%
All Other Areas	412,299	456,778	338,733	1,207,810	38.0%	



**Table A.5: Development Projects Proposing ≥2,500 Residential Units**

		Proposed Residential Units		Proposed Residential GFA	
		#	%	#	%
<b>Total Proposed Residential Units</b>		<b>854,898</b>	<b>100.0%</b>	<b>58,131,735</b>	<b>100.0%</b>
<b>Proposed Residential Units ≥ 2,500 Area</b>		<b>187,890</b>	<b>22.0%</b>	<b>10,081,041</b>	<b>17.3%</b>
<b>Active Projects</b>		<b>25,047</b>	<b>13.3%</b>	<b>1,691,415</b>	<b>16.8%</b>
21 Don Valley Pkwy	All Other Areas, Unilever Precinct	4,300	2.3%	302,000	<b>3.0%</b>
1245 Dupont St	Other Mixed Use Area	3,613	1.9%	257,813	<b>2.6%</b>
844 Don Mills Rd	Other Mixed Use Area, Don Mills Crossing	4,974	2.6%	376,408	<b>3.7%</b>
5415 Dundas St W	Etobicoke Centre	2,875	1.5%	217,645	<b>2.2%</b>
3741 Bloor St W	Etobicoke Centre	2,730	1.5%	221,434	<b>2.2%</b>
1571 Sandhurst Crcl	All Other Areas	2,555	1.4%	189,715	<b>1.9%</b>
1350 Sheppard Ave W	Avenue, Downsview	4,000	2.1%	126,400	<b>1.3%</b>
1 Concorde Gt	Other Mixed Use Area	3,914	2.1%	286,737	<b>2.8%</b>
259 Lake Shore Blvd E	Downtown and Central Waterfront	2,811	1.5%	179,956	<b>1.8%</b>
1911 Finch Ave W	Avenue, Jane Finch*	4,600	2.4%	325,383	<b>3.2%</b>
<b>Projects Under Review</b>		<b>162,843</b>	<b>86.7%</b>	<b>8,389,626</b>	<b>83.2%</b>
1966 Eglinton Ave E	Avenue, Golden Mile	4,915	2.6%	390,168	<b>3.9%</b>
1 Eglinton Sq	Avenue, Golden Mile	3,618	1.9%	312,297	<b>3.1%</b>
1880-1890 Eglinton Ave E	Avenue, Golden Mile	3,597	1.9%	274,048	<b>2.7%</b>
3401 Dufferin St	Other Mixed Use Area, Lawrence-Allen	5,126	2.7%	347,143	<b>3.4%</b>
3850 Sheppard Ave E	Other Mixed Use Area	4,372	2.3%	334,630	<b>3.3%</b>
670 Progress Ave	Scarborough Centre	3,203	1.7%	195,612	<b>1.9%</b>
1900 Eglinton Ave E	Avenue, Golden Mile	5,529	2.9%	453,255	<b>4.5%</b>
55 Lake Shore Blvd E (Block 4)	Downtown and Central Waterfront	3,076	1.6%	218,065	<b>2.2%</b>
2150 Lake Shore Blvd W	Other Mixed Use Area, Christie's	7,642	4.1%	583,876	<b>5.8%</b>
250 The East Mall	Other Mixed Use Area	5,269	2.8%	367,897	<b>3.6%</b>
3585 St Clair Ave E	Other Mixed Use Area	6,619	3.5%	489,623	<b>4.9%</b>
2180 Yonge St	Yonge Eglinton Centre	2,892	1.5%	206,803	<b>2.1%</b>
300 Borough Dr	Scarborough Centre	15,550	8.3%	1,149,000	<b>11.4%</b>
123 Garratt Blvd	Downsview	46,000	24.5%	N/A	<b>N/A</b>
6464 Yonge St	Other Mixed Use Area, Yonge Street North	8,324	4.4%	639,606	<b>6.3%</b>
1800 Sheppard Ave E	Other Mixed Use Area, Sheppard East Subway Corridor	6,200	3.3%	396,895	<b>3.9%</b>
591 Dundas St E	Downtown and Central Waterfront, Regent Park	3,432	1.8%	311,901	<b>3.1%</b>

Table A.5 continues on page 61

Table A.5 continued

		Proposed Residential Units		Proposed Residential GFA	
		#	%	#	%
595 Front St W	Downtown and Central Waterfront, Railway Lands West, Rail Deck Park	7,986	4.3%	494,133	<b>4.9%</b>
793 Don Mills Rd	Other Mixed Use Area, Don Mills Crossing	2,655	1.4%	162,530	<b>1.6%</b>
7 St Dennis Dr	All other areas	2,536	1.3%	139,544	<b>1.4%</b>
5 Tangreen Crt	All Other Areas	3,358	1.8%	207,633	<b>2.1%</b>
2400 Eglinton Ave W	Avenue	4,057	2.2%	232,736	<b>2.3%</b>
6 Thorncliffe Park Dr	All Other Areas	2,665	1.4%	191,157	<b>1.9%</b>
1025 The Queensway	All Other Areas	4,222	2.2%	291,074	<b>2.9%</b>

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

Development projects with activity between January 1, 2020 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 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.6: Projects Proposing  $\geq 100,000$  Square Metres of Non-Residential GFA**

Project Location		Proposed Non-Residential GFA	Percent
<b>City of Toronto</b>		<b>13,859,274</b>	<b>100.0%</b>
<b>Proposed Non-Residential GFA <math>\geq 100,000</math> m<sup>2</sup></b>		<b>4,202,400</b>	<b>30.3% 100.0%</b>
<b>Built Projects</b>		<b>597,205</b>	<b>14.2%</b>
156 Front St W	Downtown and Central Waterfront	115,515	2.7%
6351 Steeles Ave E	All Other Areas	128,743	3.1%
45 Bay St	Downtown and Central Waterfront, Railway Lands East	143,196	3.4%
2233 Sheppard Ave W	All Other Areas	102,991	2.5%
555 Rexdale Blvd	All Other Areas	106,760	2.5%
<b>Active Projects</b>		<b>2,254,792</b>	<b>53.7%</b>
171 Front St W	Downtown and Central Waterfront	116,682	2.8%
141 Bay St	Downtown and Central Waterfront, Railway Lands East	127,816	3.0%
21 Don Valley Pkwy	All Other Areas, Unilever Precinct	926,000	22.0%
82 Buttonwood Ave	All Other Areas, Mount Dennis	168,845	4.0%
25 King St W	Downtown and Central Waterfront	163,201	3.9%
30 Bay St	Downtown and Central Waterfront	123,854	2.9%
325 Front St W	Downtown and Central Waterfront, Railway Lands Central	273,592	6.5%
1 Yonge St (Phases 4 And 5)	Downtown and Central Waterfront	113,302	2.7%
555 University Ave	Downtown and Central Waterfront	241,500	5.7%
<b>Projects Under Review</b>		<b>1,350,403</b>	<b>32.1%</b>
25 The West Mall	Other Mixed Use Areas, Sherway Area	114,702	2.7%
2150 Lake Shore Blvd W	Other Mixed Use Areas, Christie's	121,701	2.9%
123 Garratt Blvd	All Other Areas, Downsview	1,114,000	26.5%
			0.0%
<b>Proposed Non-Res GFA between</b>	<b>50,000 m<sup>2</sup> and 99,999 m<sup>2</sup></b>	<b>1,591,591</b>	<b>11.5%</b>
<b>Proposed Non-Res GFA between</b>	<b>10,000 m<sup>2</sup> and 49,999 m<sup>2</sup></b>	<b>5,428,604</b>	<b>39.2%</b>
<b>Proposed Non-Res GFA less than</b>	<b>10,000 m<sup>2</sup></b>	<b>2,636,679</b>	<b>19.0%</b>

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

Development projects with activity between January 1, 2020 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 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.7: Proposed Development by Secondary Plan Area**

Geography	Number of Projects	%	Proposed Residential Units	%	Proposed Non-Residential GFA	%
<b>City of Toronto</b>	<b>2,335</b>	<b>100%</b>	<b>854,898</b>	<b>100%</b>	<b>13,859,274</b>	<b>100%</b>
<b>Secondary Plans</b>	<b>1,115</b>	<b>47.8%</b>	<b>587,361</b>	<b>68.7%</b>	<b>9,400,224</b>	<b>67.8%</b>
Agincourt	9	0.8%	11,708	2.0%	52,659	0.6%
Central Don Mills	10	0.9%	5,275	0.9%	39,563	0.4%
Central Finch	13	1.2%	988	0.2%	2,589	0.0%
Central Waterfront	57	5.1%	40,014	6.8%	824,775	8.8%
Christie's	2	0.2%	7,642	1.3%	124,644	1.3%
ConsumersNext	12	1.1%	5,462	0.9%	48,422	0.5%
Davenport Village	2	0.2%	967	0.2%	2,793	0.0%
Don Mills Crossing	6	0.5%	9,124	1.6%	96,300	1.0%
Downsview	7	0.6%	50,363	8.6%	1,166,342	12.4%
Downtown	503	45.1%	200,930	34.2%	4,302,781	45.8%
Dufferin Street*	11	1.0%	6,648	1.1%	17,065	0.2%
Emery Village	7	0.6%	6,084	1.0%	8,104	0.1%
Etobicoke Centre	30	2.7%	19,971	3.4%	145,220	1.5%
Fort York Neighbourhood	3	0.3%	1,345	0.2%	23,655	0.3%
Garrison Common North	49	4.4%	12,247	2.1%	344,747	3.7%
Golden Mile	21	1.9%	33,192	5.7%	190,287	2.0%
Highland Creek	13	1.2%	853	0.1%	52,365	0.6%
Jane Finch	8	0.7%	6,750	1.1%	54,581	0.6%
Keele Finch*	6	0.5%	4,184	0.7%	26,504	0.3%
Keele St.Clair*	15	1.3%	10,321	1.8%	70,369	0.7%
King-Parliament	49	4.4%	23,957	4.1%	391,777	4.2%
King-Spadina	76	6.8%	28,160	4.8%	604,699	6.4%
Lawrence-Allen	11	1.0%	6,951	1.2%	108,708	1.2%
Mimico-by-the-Lake	2	0.2%	623	0.1%	677	0.0%
Mimico-Judson	8	0.7%	6,179	1.1%	27,896	0.3%
Morningside Heights	6	0.5%	0	0.0%	100,099	1.1%
Motel Strip	5	0.4%	2,775	0.5%	17,260	0.2%
Mount Dennis*	23	2.1%	8,253	1.4%	276,883	2.9%
North York Centre	36	3.2%	14,488	2.5%	76,003	0.8%
Port Union Village Community	0	0.0%	0	0.0%	0	0.0%

Table A.7 continues on page 64



Table A.7 continued

Geography	Number of Projects	%	Proposed Residential Units	%	Proposed Non-Residential GFA	%
Queen River	6	0.5%	1,434	0.2%	2,582	0.0%
Rail Deck Park	1	0.1%	7,986	1.4%	37,117	0.4%
Railway Lands Central	3	0.3%	2,229	0.4%	288,008	3.1%
Railway Lands East	4	0.4%	0	0.0%	348,777	3.7%
Railway Lands West	3	0.3%	8,268	1.4%	52,191	0.6%
Regent Park	11	1.0%	6,398	1.1%	26,571	0.3%
ReNew Sheppard East*	37	3.3%	16,341	2.8%	145,471	1.5%
Scarborough Centre	14	1.3%	29,683	5.1%	106,269	1.1%
Sheppard East Subway Corridor	14	1.3%	11,127	1.9%	60,588	0.6%
Sheppard Lansing Area	9	0.8%	457	0.1%	3,872	0.0%
Sheppard West/Dublin	12	1.1%	1,427	0.2%	5,418	0.1%
Sheppard Willowdale	5	0.4%	243	0.0%	3,754	0.0%
Sherway Area	3	0.3%	4,517	0.8%	190,122	2.0%
Swansea	4	0.4%	893	0.2%	7,131	0.1%
Unilever Precinct	2	0.2%	4,300	0.7%	933,555	9.9%
University of Toronto	18	1.6%	597	0.1%	117,682	1.3%
Warden Woods	11	1.0%	3,845	0.7%	30,366	0.3%
Yonge Eglinton	123	11.0%	47,892	8.2%	225,106	2.4%
Yonge St. Clair	30	2.7%	9,334	1.6%	42,943	0.5%
Yonge Street North*	17	1.5%	17,510	3.0%	42,517	0.5%
York University	5	0.4%	860	0.1%	18,126	0.2%

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

Notes:

1) Development projects with activity between January 1, 2020 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 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 2, 5, and 15** 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.8: Density of People and Jobs Per Hectare in Downtown and the Central Waterfront and the 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%
Downtown and the 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.

**Table A.9a: Proposed Projects in City of Toronto by Status and District**

District	Built	Active	Under Review	Total in Pipeline	% of Total
<b>City of Toronto</b>	<b>613</b>	<b>963</b>	<b>759</b>	<b>2,335</b>	<b>100.0</b>
<b>North</b>	148	217	182	<b>547</b>	23.4
<b>East</b>	71	138	164	<b>373</b>	16.0
<b>South</b>	299	454	279	<b>1,032</b>	44.2
<b>West</b>	95	154	134	<b>383</b>	16.4

**Table A.9b: Proposed Residential Units in City of Toronto by Status and District**

	Built	Active	Under Review	Total in Pipeline	% of Total
<b>City of Toronto</b>	<b>115,466</b>	<b>307,056</b>	<b>432,376</b>	<b>854,898</b>	<b>100.0</b>
<b>North</b>	20,255	71,008	140,647	<b>231,910</b>	27.1
<b>East</b>	6,890	31,845	102,408	<b>141,143</b>	16.5
<b>South</b>	74,302	151,704	114,814	<b>340,820</b>	39.9
<b>West</b>	14,019	52,499	74,507	<b>141,025</b>	16.5

**Table A.9c: Proposed Non-Residential GFA in City of Toronto by Status and District**

	Built	Active	Under Review	Total in Pipeline	% of Total
<b>City of Toronto</b>	<b>3,333,232</b>	<b>5,837,749</b>	<b>4,688,293</b>	<b>13,859,274</b>	<b>100.0</b>
<b>North</b>	358,115	553,864	1,858,373	<b>2,770,352</b>	20.0
<b>East</b>	412,202	524,022	957,699	<b>1,893,923</b>	13.7
<b>South</b>	1,794,479	3,911,518	1,171,394	<b>6,877,391</b>	49.6
<b>West</b>	768,436	848,345	700,827	<b>2,317,608</b>	16.7

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

Development projects with activity between January 1, 2020 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 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.

## 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 2024, CMHC recorded 88,707 total residential units completed in Toronto, 75% of which were condominium apartments.<sup>47</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. CMHC previously provided rental absorption figures for 2010-2023, however, CMHC was unwilling to provide rental absorptions for 2024 citing their current rationale that purpose-built buildings are considered 100% absorbed upon completion and, in their opinion, a purpose-built rental absorption figure would not be accurate. [Table A.10](#) compares the number of completions and absorptions in Toronto over the last 15 years. The average percentage of unabsorbed units decreased from 6% in the 2010 to 2014 period to 1% from 2015 to 2019, rising to 6% for the 2020 to 2024 period, though, as mentioned the figure for 2024 does

not include rental absorptions. The unabsorbed percentage of completed dwellings has remained small in Toronto, regardless of the tenure of the unit (see [Table A.11](#)).

The Market Absorption Survey demonstrates that the bulk of the unabsorbed units are in the purpose-built rental market. The higher rate of unabsorbed rental units, as seen in [Table A.11](#) excluding 2024, is not the result of an oversupply of this type of unit. 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 A10: Dwelling Unit Completions and Absorptions, City of Toronto**

Year	Completions	Absorptions	Net Completions	"Unabsorbed" Percentage
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%
2024*	24,110	19,610	4,500	22.9%
<b>Total</b>	<b>257,355</b>	<b>246,437</b>	<b>10,918</b>	<b>4.4%</b>
2010 - 2024	17,157	16,429	728	4.4%
2010-2014 Average	13,501	12,688	813	6.4%
2015-2019 Average	18,325	18,092	233	1.3%
2020-2024 Average	19,645	18,507	1,137	6.1%

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

Note 1: "Unabsorbed Percentage" is the ratio of Completions minus Absorptions to Absorptions.

Note 2: The Absorption figure for 2024 excludes purpose-built rental units.



**Table A.11: Dwelling Unit Completions and Absorptions by Type, City of Toronto**

Freeholds				
	Completions	Absorptions	Net Completions	"Unabsorbed" Percentage
2020	1,247	1,259	-12	-1
2021	1,052	1,131	-79	-7
2022	983	975	8	1
2023	1,217	1,063	154	14
2024	1,472	1,552	-80	-5
<b>Total</b>	<b>5,971</b>	<b>5,980</b>	<b>-9</b>	<b>-0.2</b>
Condominiums				
	Completions	Absorptions	Net Completions	"Unabsorbed" Percentage
2020	13,315	13,204	111	1
2021	15,994	16,073	-79	0
2022	13,194	13,254	-60	0
2023	14,076	14,164	-88	-1
2024	18,059	18,058	1	0
<b>Total</b>	<b>74,638</b>	<b>74,753</b>	<b>-115</b>	<b>-0.2</b>
Purpose-Built Rental				
	Completions	Absorptions	Net Completions	"Unabsorbed" Percentage
2020	2,714	2,600	114	4
2021	3,224	2,734	490	18
2022	2,119	1,715	404	24
2023	4,979	4,755	224	5
2024*	4,579	n/a	4,579	n/a
<b>Total</b>	<b>17,615</b>	<b>11,804</b>	<b>5,811</b>	<b>49.2</b>

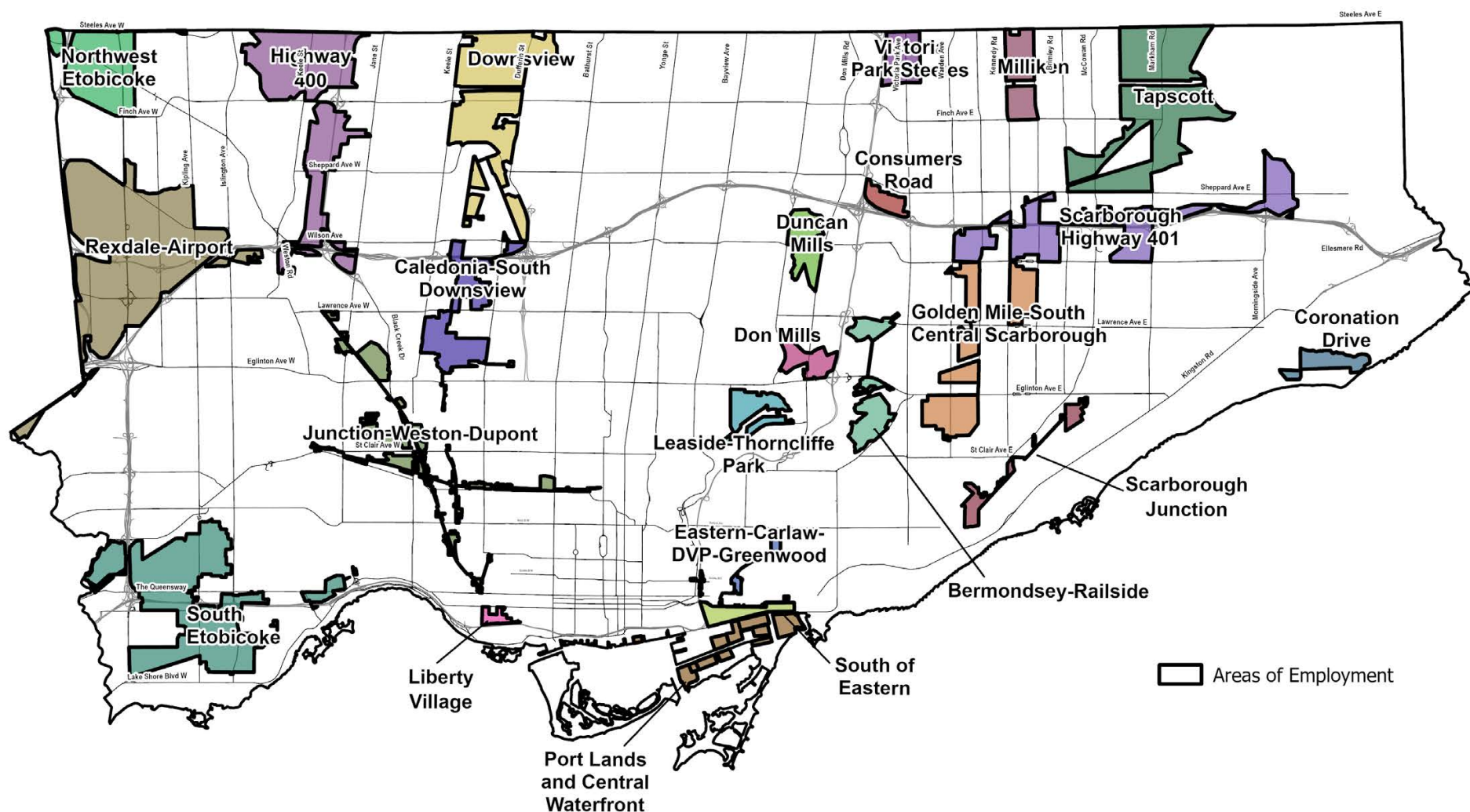
Source: Canada Mortgage Housing Corporation, Market Absorption Survey Custom Tabulation.

Note 1. The data in Appendix **Table A.11** reflects the total number of units for each 12 month period. Due to cyclical variations in the construction and sales industry that are unequally distributed throughout the year 2022 year-to-date data has been excluded.

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

Note 3. The Absorption figures for 2024 excludes purpose-built rental units.

## Appendix 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, 2025

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# 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.
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