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DATE: July 15, 2003

TO: Chairman and Members of the Planning and Development Committee

FROM: Thomas S. Mokrzycki, Commissioner of Planning and Building

SUBJECT: **The 2001 Greater Toronto Area (GTA) Residential Land Inventory Survey**
MEETING DATE: August 5, 2003

ORIGIN: Planning and Building Department

BACKGROUND: The Greater Toronto Area (GTA) Residential Land Inventory Survey was initiated in 1993 by the Office of the Provincial Facilitator to monitor the supply of land for residential development in the regional municipalities of Durham, Halton, Metropolitan Toronto, Peel and York. The ***"The 2001 GTA Residential Land Inventory Survey"*** was published in February 2002. It is the seventh survey undertaken by the Urban Development Institute (UDI), Canada Mortgage and Housing Corporation (CMHC), the Ontario Ministry of Municipal Affairs and Housing (MMAH) and PMA Brethour.

Local municipalities are required by the Provincial Policy Statement to make provision "for a full range of housing types and densities to meet projected demographic and market requirements of current and future residents of the housing market area". A three-year supply of registered and draft approved land for housing and a ten-year supply of designated land for residential use is specified. In addition to each municipality monitoring its own land supply and, as a result of discussions between the Office of the Provincial Facilitator and the development industry, it was considered beneficial to monitor the residential land supply for the GTA as a whole. As a result, an annual survey of the GTA residential land inventory has been conducted in 1994, 1995, 1996, 1997, 1998, 2000 and 2001. No survey was completed for 1999.

The purpose of the survey is to provide information on the residential land supply in various stages of the development approvals process, and to help identify potential land supply problems. It is not intended to cover all matters related to the supply of land and does not address issues such as the change in market preferences, the availability of servicing or the time required to obtain development approvals.

COMMENTS:

As of January 1, 2001, it was reported that there were an estimated 170,894 units in approved[1] development applications within the GTA. A significant proportion of these are apartments and single detached units. The GTA supply consists of 69,115 single detached units (40.4% of total supply) and 59,007 apartment units (34.5% of total supply). Rowhouses and semi-detached supply consists of 26,505 units (15.5%) and 16,267 units (9.5%), respectively. The estimated duration of supply[2] is calculated at 2.5 to 4.3 years for single detached units, 6.8 to 11.7 years for apartments, 2.7 to 4.3 years for rowhouses, and 2.0 to 3.9 years for semi-detached. The supply of units in approved development applications for single detached, semi-detached and rowhouses would be less than three years under the

[1] *The GTA Residential Land Inventory defines approved units as those associated with draft approved development applications which either have Official Plan Amendments (OPAs) approved by City Council and the (Regional) approval authority,or do not require such approval, as well as units associated with site plan applications and lots on vacant residential zoned lands (such as registered plans) which have not been issued building permits.*

[2] *Duration of supply is estimated on the basis of three absorption scenarios. Scenario A represents the average annual number of building permits issued by unit type during 1998 and 1999. Scenario B is Scenario A increased by 50%. Scenario C is the 5 year average of building permits issued by type from 1995 to 1999.*

most rapid growth scenario used in the 2000 GTA Residential Land Inventory Survey. Under the least rapid growth scenario, all housing unit types have greater than three years of supply. The GTA has 107,400 units in the "additional supply" [3] category. Those are comprised of 54,374 single detached units (50.6%), 28,876 apartment units (26.9%), 16,365 rowhouses (15.2%), and 7,785 semi-detached units (7.2%).

In addition to analysis for the GTA as a whole, the survey reports the number of housing units in approved development applications for each region and local municipality by dwelling type. With respect to the Region of Peel, there were 51,460 units in the development applications process. Of these, 17,758 units (34.5%) are single detached (2.5 to 4.2 years of supply in Peel), 20,602 units (40.0%) are apartments (20.3 to 40.6 years), 7,108 units (13.8%) are rowhouses (2.7 to 4.4 years) and 5,992 units (11.6%) are semi-detached (1.7 to 3.1 years). At the Regional level, the duration of supply estimated for single detached, semi-detached and rowhouse units is less than three years using the most rapid growth scenario. Peel has an additional supply of 27,291 units, comprised of 9,918 single detached (36.3%), 9,282 apartment units (34.0%), 5,324 rowhouses (19.5%) and 2,767 semi-detached (10.1%).

Exhibit 1 summarizes approved lots and duration of supply estimates for regions in the GTA.

For Mississauga, the report indicates 34,281 units (66.6% of the total number in Peel) in the approved development category, with 18,985 apartment units (55.4%), 5,934 single detached (17.3%), 5,649 rowhouses (16.5%), and 3,713 semi-detached (10.8%). Apartment supply is expected to last from 21.6 to 42.3 years, single-detached from 2.3 to 3.4 years, rowhouses from 3.8 to 5.7 years, and semi-detached from 1.5 to 3.5 years. (See Exhibit 2). The most rapid growth scenarios for single-detached and semi-detached units estimates supply at less than three years.

[3] *The GTA Residential Inventory defines additional supply as including those units on applications which have City Council adopted OPAs, however, are awaiting approval authority approval, as well as applications which have both City Council and approval authority approved OPAs which are not draft approved.*

Sufficient supply of apartment and rowhouse units exists to meet the three year requirement for all absorption scenarios.

The estimate for additional supply in the City of Mississauga was 20,105 units comprised of 8,651 apartment units (51.7%), 4,150 rowhouses (24.8%), 2,648 single detached (15.8%), and 1,277 semi-detached (7.6%).

Exhibit 2 summarizes approved lots and duration of supply estimates for municipalities in Peel.

CONCLUSION: Provincial policy specifies that local municipalities maintain a short term, three-year supply of registered and draft approved land for housing. Under the low land absorption scenario developed by the 2001 GTA Residential Land Inventory Survey, sufficient supply exists for all unit types in the GTA and Peel Region. In the high absorption scenario, sufficient land supply exists for apartment units only in those areas. The land supply situation is similar for Mississauga, with the exception of rowhouses for which sufficient supply exists, in all absorption scenarios.

RECOMMENDATION: That the report titled "*The 2001 Greater Toronto Area (GTA) Residential Land Inventory Survey*" dated July 15, 2003 from the Commissioner of Planning and Building be circulated to the Region of Peel, the Urban Development Institute (UDI), Canada Mortgage and Housing Corporation (CMHC), the Ontario Ministry of Municipal Affairs and Housing (MMAH) and PMA Brethour.

Original Signed By:
Thomas S. Mokrzycki
Commissioner of Planning and Building

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Exhibit 1

APPROVED LOTS AND DURATION OF SUPPLY IN REGIONS OF THE GTA

Approved Lots in Supply by Region

Region	Single	Semi	Rowhouse	Apartment
Durham	18,400	2,813	5,530	5,216
Halton	5,636	931	2,569	1,585
City of Toronto	722	689	2,143	25,905
Peel	17,758	5,992	7,108	20,602
York	26,599	5,842	9,155	5,699
GTA	**69,115**	**16,267**	**26,505**	**59,007**

Duration of Supply (Years)

Region	Single	Semi	Rowhouse	Apartment
Durham	4.1 - 7.2	3.5 - 6.3	6.9 -11.6	15.2 - 34.3
Halton	1.7 - 3.0	2.4 - 4.8	1.8 - 3.0	0.9 - 2.5
City of Toronto	0.4 - 0.7	1.0 - 1.9	1.9 - 2.7	6.2 - 9.3
Peel	2.5 - 4.2	1.7 - 3.1	2.7 - 4.4	20.3 - 40.6
York	2.3 - 4.4	2.3 - 4.9	2.3 - 4.3	4.1 - 10.8
GTA	**2.5 - 4.3**	**2.0 - 3.9**	**2.7 - 4.3**	**6.8 - 11.7**

APPROVED LOTS AND DURATION OF SUPPLY IN PEEL MUNICIPALITIES

Approved Lots in Supply for Municipalities in Peel

Region	Single	Semi	Rowhouse	Apartment
Mississauga	5,934	3,713	5,649	18,985
Caledon	2,065	385	155	486
Brampton	9,759	1,894	1,304	1,131
Peel Total	**17,758**	**5,992**	**7,108**	**20,602**

Duration of Supply (Years)

Region	Single	Semi	Rowhouse	Apartment
Mississauga	2.3 - 3.4	1.5 - 3.5	3.8 - 5.7	21.6 - 42.3
Caledon	2.9 - 4.3	1.4 - 3.9	1.8 - 2.7	>50
Brampton	2.7 - 5.3	2.1 - 3.2	1.3 - 2.5	8.4 - 19.5
Peel Total	**2.5 - 4.2**	**1.7 - 3.1**	**2.7 - 4.4**	**20.3 - 40.6**