Report to Planning and Environment Committee

To: **Chair and Members**
Planning and Environment Committee
From: **Scott Mathers, MPA, P.Eng.**
Deputy City Manager, Housing and Community Growth
Subject: **2025 Annual Development Report**
Date: **February 18, 2026**

Recommendation

That, on the recommendation of the Deputy City Manager, Housing and Community Growth, the 2025 Annual Development Report, attached as Appendix "A", **BE RECEIVED** for information.

Executive Summary

The Annual Development Report provides a yearly update and commentary on development activity in the City of London, which is a companion to monthly and seasonal updates. The Annual Development Report monitors historic and projected near-term growth of residential, commercial, institutional and industrial development; affordable housing development; development application statistics; and, process improvement initiatives to support more developments.

2025 saw record-high building permit activity and continued the strong rebound in residential permits that began in 2024. Residential units created through building permits more than tripled compared to the historic low recorded in 2023. This performance was supported by the development industry's strong commitment to housing projects, sustained high levels of development applications and Council approvals, and a significant year-over-year increase in total housing units.

Some highlights of the year include:

- Council approved a total of 51,434 new housing units since 2022, exceeding the provincial pledge of 47,000 units.
- Record growth in residential units allowed, with building permits issued for 5,462 new units. This is the highest annual number of units with issued permits ever for the City, over 35% higher than the previous high in 2021 and was driven largely by a substantial increase in high-density housing forms.
- A total of 2,576 city-funded affordable housing units were tracked in 2025.
- Remarkable improvements were achieved in development application processing timelines. In particular:
    - Minor zoning by-law amendments were processed in less than 40 days;
    - Shortened timelines and an improvement in the number of applications approved within statutory timeframes for such applications as: removal of holding provisions, draft plan approvals of subdivision, and draft plan approvals of condominiums;
    - The City is also consistently meeting or approaching 100% of provincial performance targets for application reviews of the other application types.

However, the continued shift to high density residential and the reduced number of low density residential units will also require continued monitoring, because of the difference between actual units achieved versus projections. This has a related impact on the Development Charges (DC) reserves and the reserve funds ability to finance new growth infrastructure construction.

Linkage to the Corporate Strategic Plan

The Annual Development Report supports the 2023-2027 Strategic Plan for the City of London through the Housing and Homelessness strategic area of focus by developing and enhancing planning implementation tools that advance the polices of The London Plan and increasing the efficiency and consistency of planning and development processes.

Background

On June 17, 2019, a staff report recommending that a regular reporting tool to communicate development statistics and progress on continuous improvement initiatives be developed and published on an annual basis was submitted to the Planning and Environment Committee. The recommendation was approved by Council.

Similar to previous years, the attached 2025 Annual Development Report covers historic and projected near-term growth by development type, 2021-2025 development application activity, the percentage of new residential units located within the Built-Area Boundary, the continuous improvement initiatives that were taken in 2025 to support accelerating more housing and developments, as well as an update on the Roadmap to 3,000 Affordable Units Plan by 2026 and the City's Housing Pledge for 47,000 new units by 2031.

Two recent reports relating to this Annual Development Report include:

- November 4, 2025, where an Interim Control By-law was passed to temporarily limit the number of bedrooms permitted in Additional Residential Units (ARUs), ensuring balanced intensification consistent with Council's housing objectives while related policy work is undertaken.

- November 12, 2025, where a staff report entitled "Housing Accelerator Fund – 2025 Annual Update" was presented to the Planning and Environment Committee. The reporting cycle aligns with the CMHC annual compliance reporting period of September 2024 to September 2025. The report confirms that the City has exceeded the Housing Supply Growth Target for building permits for the second consecutive year and that 10 of the 11 Housing Accelerator Fund (HAF) initiatives have been completed in their entirety.

Key Findings

In 2025, a total of 5,462 new housing units were approved through the issuance of building permits in the City, representing the highest annual total in more than a decade. This reflects a 48% increase over 2024, sustaining the strong rebound from the historic low in 2023. Of the 4,842 new residential units with permits issued in 2025, 5% were single-detached, semi-detached dwellings and single detached cluster units, 13% were rowhouses and townhouses, and 82% were apartments and other multi-unit dwellings. High-density housing was the primary driver of growth, with 3,980 units delivered, surpassing the historical annual totals across all housing types observed over the past 10 years.

Residential permit activity in 2025 further demonstrates the ongoing shift toward medium- and higher-density housing forms, with comparatively fewer low-density units being built. Building permit activity by housing type will continue to require close monitoring, particularly given the persistent and significant shortfall in low-density residential units relative to Council-approved projections for the fourth consecutive year. 214 low-density units were allowed in 2025, whereas the projections which DC reserves are based upon was anticipating 958 new low-density units. This is 78% below the projection.

Additional Residential Units (ARUs) have continued to increase over the past five years, although growth slowed in 2025, with 487 units allowed, representing an 12% year-over-year increase. Approximately one-fifth of all ARUs in 2025 were located in the

Argyle and Jackson planning districts. About half of ARUs were distributed relatively evenly across nine other planning districts, including Glen Cairn, Fox Hollow, Southcrest, Talbot, Huron Heights, West London, Carling, Longwoods, and Hyde Park.

While overall ARU growth stayed modest in 2025 and the majority of ARUs remained as basement units, the proportion located in accessory structures increased by approximately threefold compared to 2024, accounting for more than 10% of all ARUs. In addition, the share of larger ARUs with more bedrooms rose from negligible levels to approximately 10% prior to the introduction of the Interim Control By-law in November. While being interim, this by-law ensures balanced and gentle intensification, while continuing to promote housing diversity, affordability, and sustainable land use through the creation of ARUs and the preservation of neighbourhood character.

In tracking progress toward achieving the Housing Pledge of 47,000 new units, a total of 15,360 residential units had been created by the end of 2025, including 4,817 units delivered in 2025 alone. This total includes housing units where occupancy occurred after 2022, as well as:

- Commercial to residential conversions,
- CMHC Housing Starts,
- Additional Residential Units (ARUs),
- Long-Term Care Beds,
- Postsecondary Student Beds, and
- Congregate Retirement Home Suites.

This progress is regularly updated on the City's Increasing Housing Supply Update webpage: https://london.ca/business-development/increasing-housing-supply-update. As several data sources are maintained by the Province, London's final Building Faster Fund performance cannot be determined at this time. The City's final 2025 Building Faster Fund performance will be announced by the Province later this year.

Building on the rebound observed in 2024, Council approvals of projects going through the planning and development approval process have increased steadily in 2025. Since January 2022, Council has approved 51,434 units through site-specific zoning by-law amendments and draft approved subdivision plans. In 2025 alone, Council approved zoning for 4,958 units through site-specific zoning by-law amendments and 12,144 units in draft approved subdivision plans. Additionally, 5,108 residential units were in registered subdivisions as individual building lots or multi-unit blocks, as of the end of 2025.

The intensification rate—defined as the proportion of new residential units created within the 2016 Built-Area Boundary as identified in The London Plan—increased slightly to 54% in 2025. This brought the five-year average intensification rate to 41.6%, moving it closer to the policy target of 45%. This increase was largely driven by a higher proportion of high-density residential units (i.e., apartments and other multi-unit dwellings) being located within the Built-Area Boundary.

Non-residential development declined in 2025 amid economic uncertainty and trade tensions. Industrial and institutional development fell by approximately half compared to 2024, while commercial development remained relatively stable. Continued monitoring is required, as non-residential development remains significantly below Council-approved growth projections and is contributing to lower-than-expected development charge revenues.

Development application activity levels remained relatively stable in 2025 with a total of 408 applications received. Of these, 98 rezoning and site plan applications proposed the creation of 21,915 residential units - more than double the number presented in previous year. This demonstrates strong interest from the development industry in new opportunities and housing growth in the City.

In addition, numerous process improvement initiatives have been implemented to streamline the approval process, accelerate processing timelines, enhance service delivery, and support the development of affordable housing. These initiatives include delegating minor zoning by-law amendments to staff, which has significantly reduced processing timelines to just over one-third of the legislative timeframe. Furthermore, the average processing timelines for all development types continue to decrease, consistently meeting—and in many cases exceeding—legislative targets for application reviews. Notable improvements are evident across specific development application types, including the removal of holding provisions, draft plan approvals for condominiums, and draft plan approvals for subdivisions.

Targeted enhancements—such as refined financial incentives, process optimization, reduced administrative barriers, operational improvements to create shovel-ready sites, and leveraging various partnership models—are among the many strategies supporting and accelerating affordable housing development. Staff remain committed to advancing further process improvements, with the ultimate goal of accelerating housing delivery and sustainably increasing the supply of affordable housing for Londoners.

Since the launch of the Roadmap to 3,000 Affordable Units Plan in late 2021, a total of 2,576 City-funded affordable housing units have been tracked which is an increase of 437 units since the end of 2024. As of December 31, 2025, the total city-funded affordable rental and ownership units tracked include 675 in progress and 1,360 in planning.

As of December 31, 2025, a total of 44 City-led shovel-ready Highly Supportive Housing (HSH) units have been completed and occupied. Current community-led developments account for an additional 188 Highly Supportive Housing units in progress and 115 units in planning. There is an additional 75 non-city-funded HSH units, including 26 at the Salvation Army HART Hub and 49 HSH units operated by London Cares, for a total of 422 HSH units tracked in 2025.

The City cannot address the affordable housing crisis without the support of non-profit and for-profit developers. According to information from the Canada Mortgage and Housing Corporation's open data portal another 693 affordable units have been constructed in our community that were not funded by the City. In addition to these units, and the 75 highly supportive housing noted above, a total of 3,344 affordable units will be or have been constructed in London since Council's approval of the Roadmap to 3,000 Affordable Units in late 2021.

For more information about community and affordable housing initiatives in the City of London and Middlesex County, see the February 17, 2026 report to Community and Protective Services Committee.

Conclusion

The attached 2025 Annual Development Report provides a summary of historic and projected near-term growth of residential and non-residential development, 2021-2025 development application activity, and continuous improvement initiatives that were undertaken in 2025, as well as updates on affordable housing units and residential units in development approval stages.

The 2025 report demonstrates a strong rebound in residential building activity overall, particularly for medium-density and high-density units. The development trend away from low-density units also continues, with low-density units not meeting projected levels. Non-residential development also declined in 2025 amid economic uncertainty and trade tensions. Noting that the requirement for ongoing monitoring of actual units versus projections is required because of the impact on DCs reserves and reserve funds ability to finance new growth infrastructure construction.

Many application process improvements and review improvements were also achieved in 2025 in an effort to accelerate housing development, including affordable housing

development, and achieve the city's housing supply targets.

The Annual Development Report is intended to be a helpful monitoring tool for Council as well as a reference for market analysis studies undertaken by members of the community. It also provides an enhanced input into the Growth Management Implementation Strategy (GMIS) and recommendations for infrastructure planning.

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Appendix A

2025

ANNUAL DEVELOPMENT REPORT

PLANNING & DEVELOPMENT

The City of London

London
CANADA

2025 Annual Development Report

The Annual Development Report (ADR) provides updates and commentary on development activity in the City of London. The ADR monitors:

- residential, commercial, institutional and industrial development;
- affordable housing unit supply;
- residential units in various stages of the development approval process;
- development application statistics; and
- Housing and Community Growth process-based continuous improvement initiatives.

Highlights in 2025

Residential Development

Change (▲▼) compared to 2024

5,462 ▲+48%
Housing Units with Permits Issued

214 ▼-21%
Single, semi-detached, single cluster units - **5%** of total 4,842 residential units

648 ▲+24%
Rowhouse and townhouse units -**13%** of total 4,842 residential units

3,980 ▲+80%
Apartments and multi-unit - **82%** of total 4,842 residential units

487 Additional Residential Units (ARUs) ▲+12%

133 Other housing units in commercial/ institutional developments

54% Intensification rate (Percentage of residential units located within the Built-Area Boundary)

Non-Residential Development

91,450
m^2 of Gross Floor Area with Permits Issued
▼-43%

32,432 ▼-54%
Industrial development
(**36%** of total gross floor area)

27,823 ▲+1%
Commercial (retail and office) development
(**30%** of total gross floor area)

31,195 ▼-50%
Institutional development
(**34%** of total gross floor area)

Affordable Housing

2,576 City-Funded Affordable Housing Units Tracked up to the end 2025

541 units built and occupied

1,360 units in planning

675 units in progress

424 remaining of the 3,000 target

+ 693 non-city-funded affordable rental units built and occupied

+ 75 non-city-funded highly supportive housing units built and occupied

Housing Units in the Development Approvals Process

London's Annual Housing Targets

3,917 Target units (2024) & **4,700** Target units (2025)

3,700* units
with permits issued in 2024

5,462* units
with permits issued in 2025

*Includes housing units in issued building permits. The Provincial pledge count is based on CMHC housing starts and other provincial housing data.

Council Approved

22,890 units in 2024

17,102 units in 2025

Approved Lots and Blocks

4,986 units in 2024

5,108 units in 2025

Open Site Plans and Condos

15,132 units in 2024

16,163 units in 2025

Issued Permits and Inspections

3,700 units in 2024

5,462 units in 2025

Development Application Activity

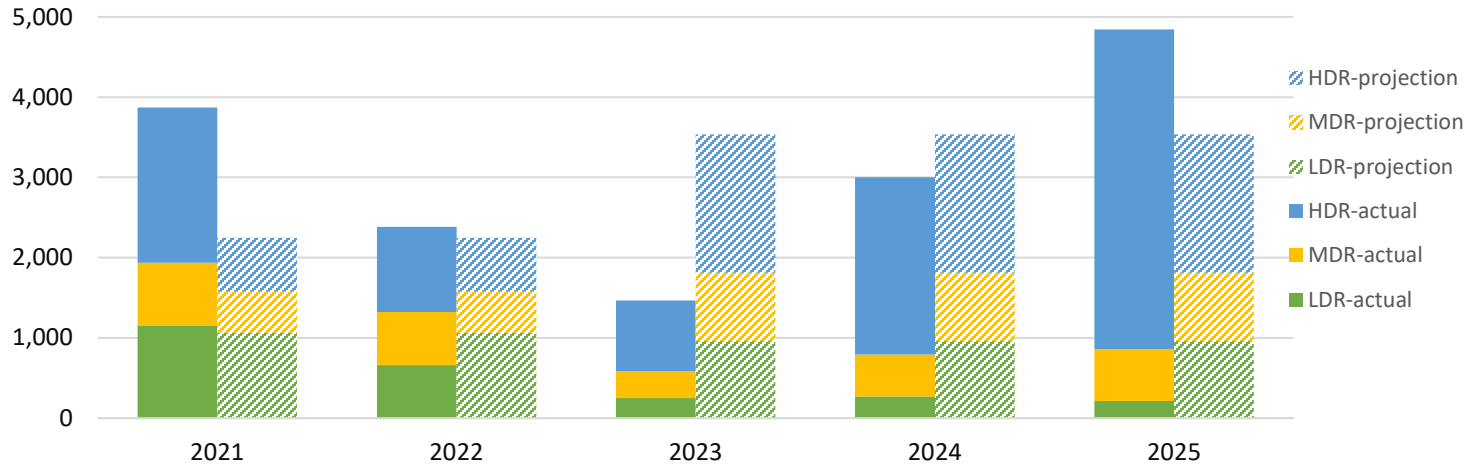
408
applications received
-0.5%

25,669
residential units proposed through applications
(Site-specific Official Plan Amendments and Zoning By-law Amendments, and Site Plans)

	Percentages of Applications Processed within *Planning Act* Timelines	Average Days to Process (In Calendar Days)
Official Plan Amendment and Zoning By-law Amendment	94%	89
Zoning By-law Amendment	95%	76
Minor Zoning By-law Amendment	100%	31
Temporary Zoning	100%	77
Removal of Holding Provision	78%	54
Draft Plan of Subdivision	33%	145
Draft Plan of Condominium	100%	79
Consent	100%	51
Minor Variance	99%	23
Site Plan	100%	24

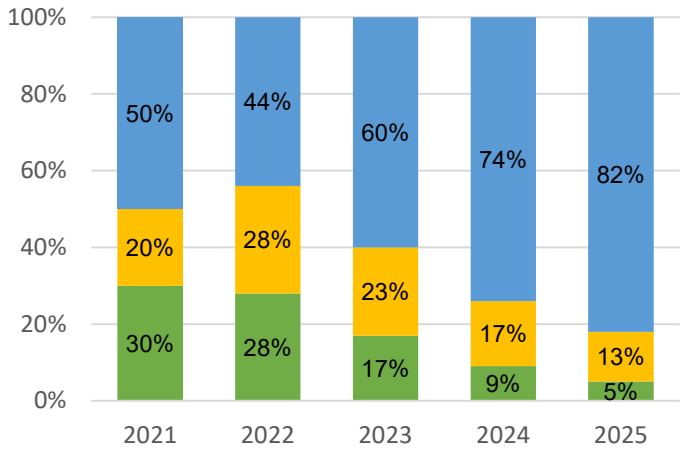
Building Permit Activity

Residential Permit Activity

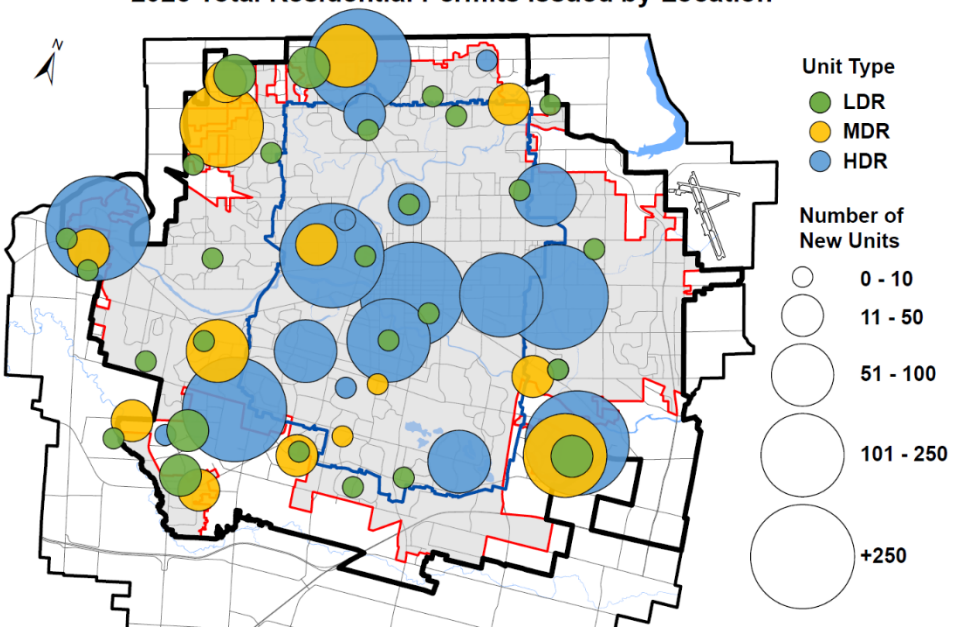


Units & Changes (▲▼)

		Compared to 2024	Compared to projections
Low Density Residential (LDR) Single, semi-detached, single cluster dwellings	214	▼-21%	▼-78%
Medium Density Residential (MDR) Rowhouses and townhouses	648	▲+24%	▼-24%
High Density Residential (HDR) Apartments and multi-unit dwellings	3,980	▲+80%	▲+131%



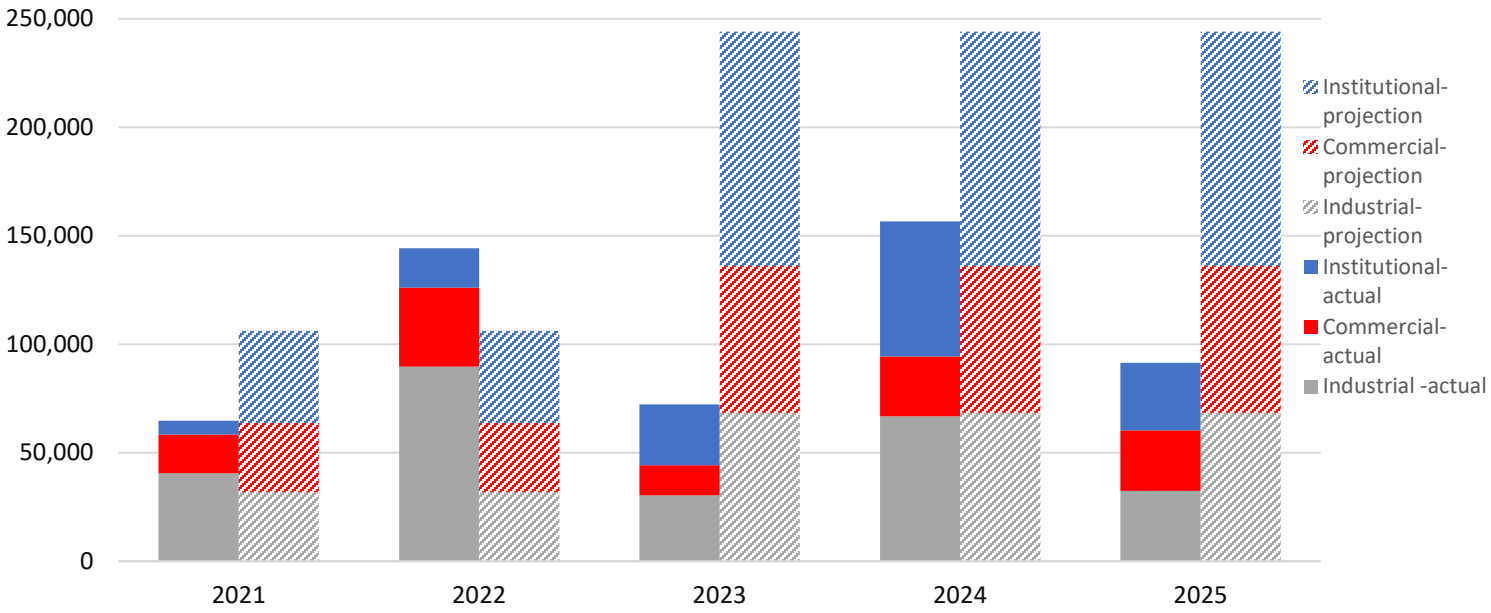
2025 Total Residential Permits Issued by Location



4,842 Units with permits issued (Total LDR/MDR/HDR categories)

28 Apartment buildings with permits issued ranging in size from 6 to 446 units

Non-Residential Permit Activity



91,450 m² of GFA with permits issued (Total)

36% is industrial.

30% is commercial.

34% is institutional.

6 New industrial buildings with permits issued

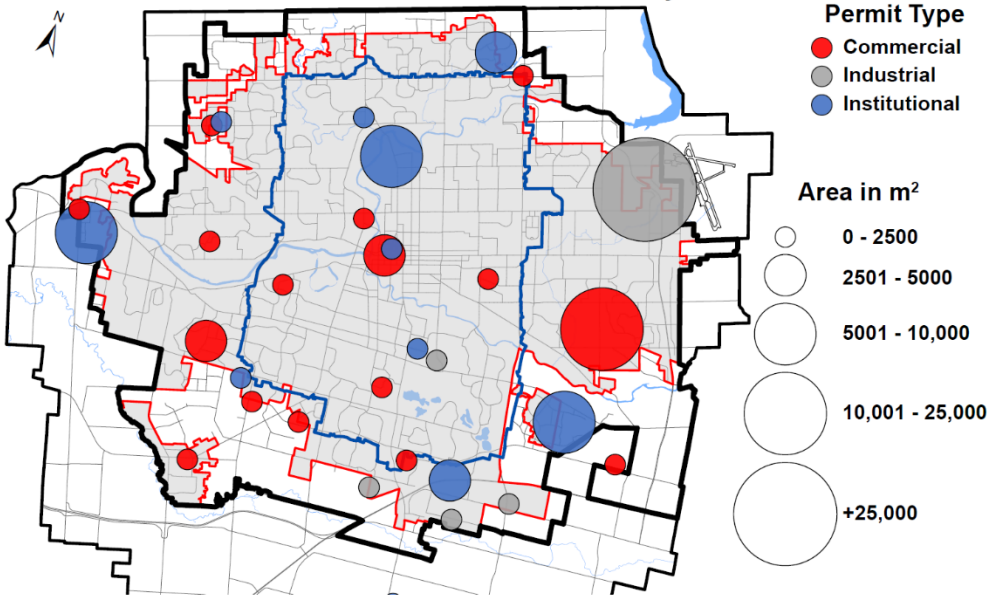
12 New commercial buildings with permits issued

7 New institutional buildings with permits issued

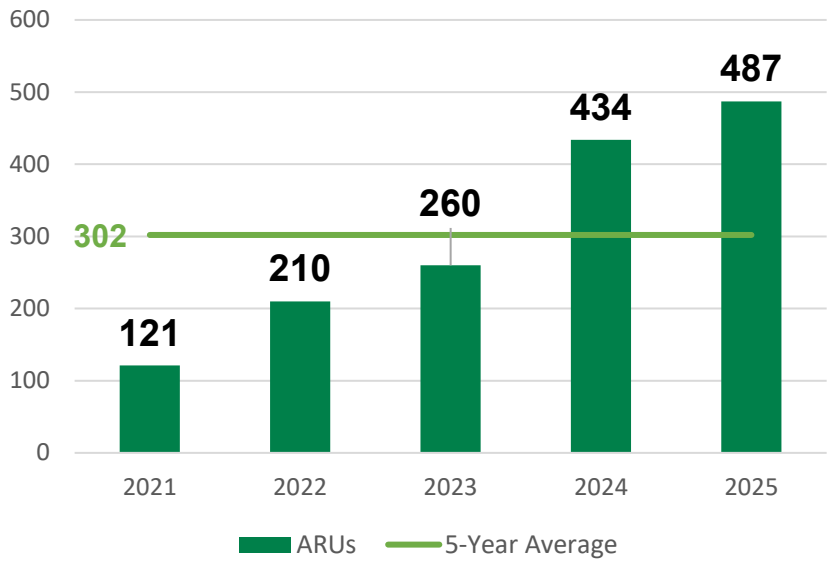
GFA (m²) & Change (▲▼)

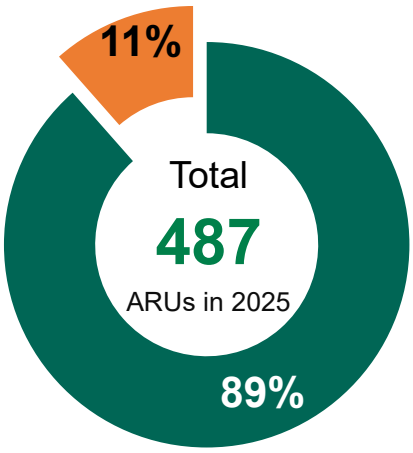
		Compared to 2024	Compared to projections
Industrial	32,432	▼ -54%	▼ -53%
Commercial (Retail & Office)	27,823	▲ +1%	▼ -59%
Institutional	31,195	▼ -50%	▼ -71%

2025 Total Non-Residential Permits Issued by Location



Additional Residential Units (ARUs)



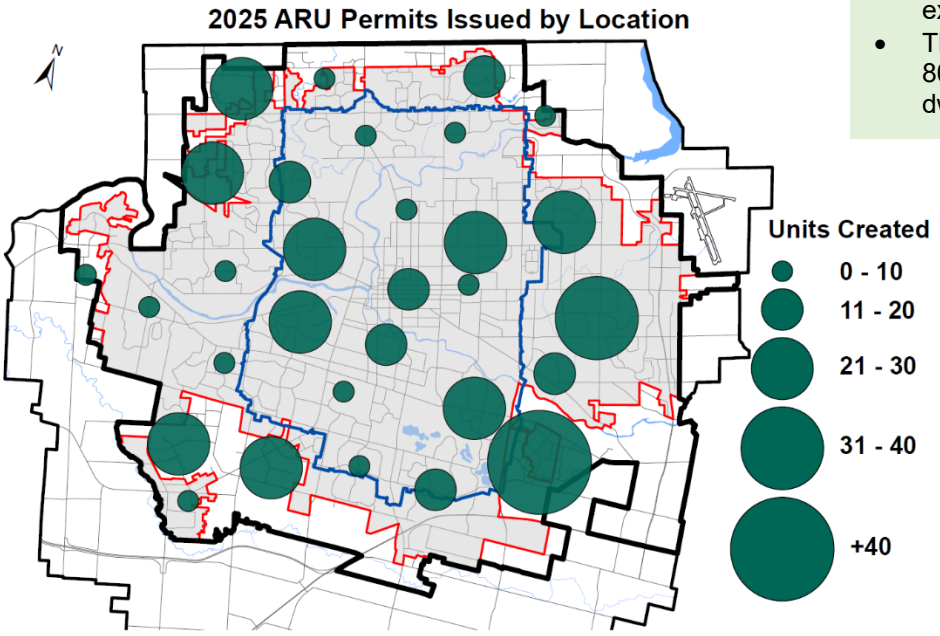


In a main dwelling

431 units with permits issued

In an accessory structure

56 units with permits issued



An Additional Residential Unit (ARU) is a self-contained residential unit with kitchen and bathroom facilities within, and an ancillary to, an existing dwelling.

ARUs in a main dwelling

ARUs in an accessory structure

A maximum of three ARUs are permitted within a single-detached, semi-detached or street townhouse dwelling in a lot, including a maximum of two ARUs in a maximum of one accessory structure. ARUs do not include lodging houses or converted dwellings.

Interim Control By-law – Effective November 4, 2025

City wide, except within the Near Campus Neighbourhood Special Policy Area

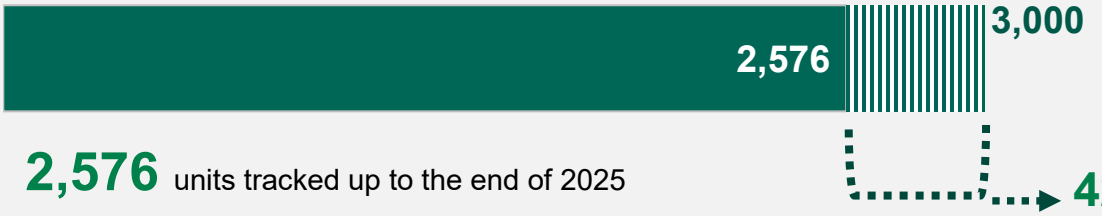
- Each ARU may contain no more than two bedrooms.
- The total of bedrooms in all ARUs within or attached to the main dwelling cannot exceed three.
- The total number of bedrooms in all ARUs located within an accessory building cannot exceed three.
- The gross floor area of any ARU cannot exceed 80 percent of the gross floor area of the primary dwelling unit.

12% Increased in the number of ARUs from 2024.

75% of new ARUs were in the Built-Area Boundary.

Affordable Housing

Affordable Housing Target by 2026 – Roadmap to 3,000



2,576 units tracked up to the end of 2025

424 units for future opportunities

Affordable Housing Projects Tracked

885 units
Affordable Rental - City-led Shovel Ready Developments

1,229 units
Affordable Rental – Community-Led Developments

693 units
Affordable Rental – Non City Funded Developments

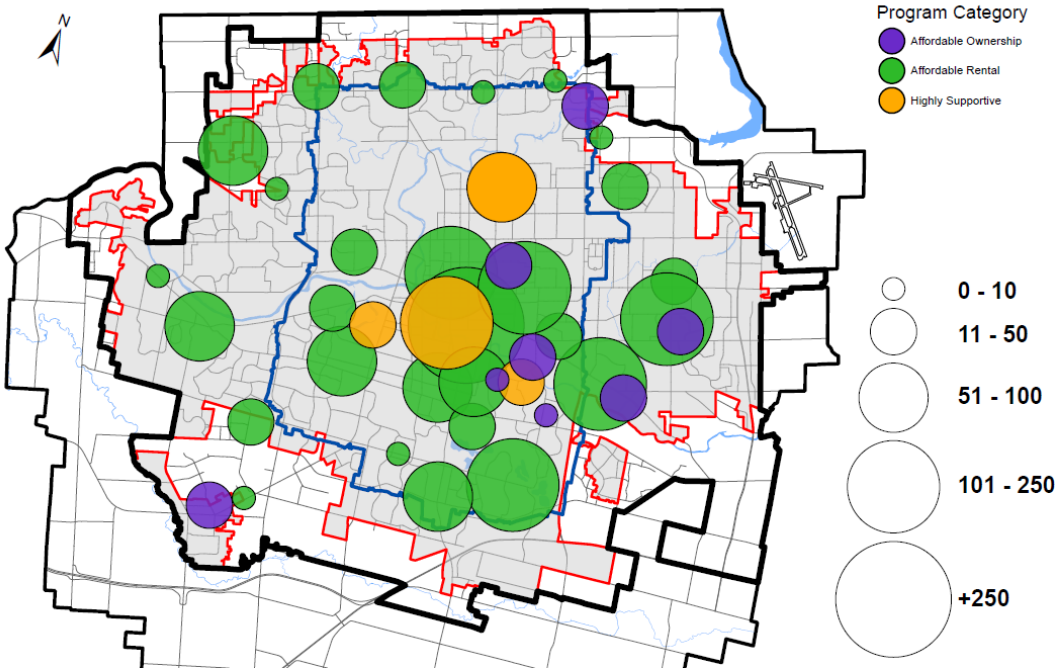
101 units
Affordable Ownership - City-led Shovel Ready Developments

14 units
Affordable Ownership – Community-Led Developments

347 units
Highly Supportive Housing

75 units
Highly Supportive Housing – Non City Funded Developments

Affordable Housing Units by Location

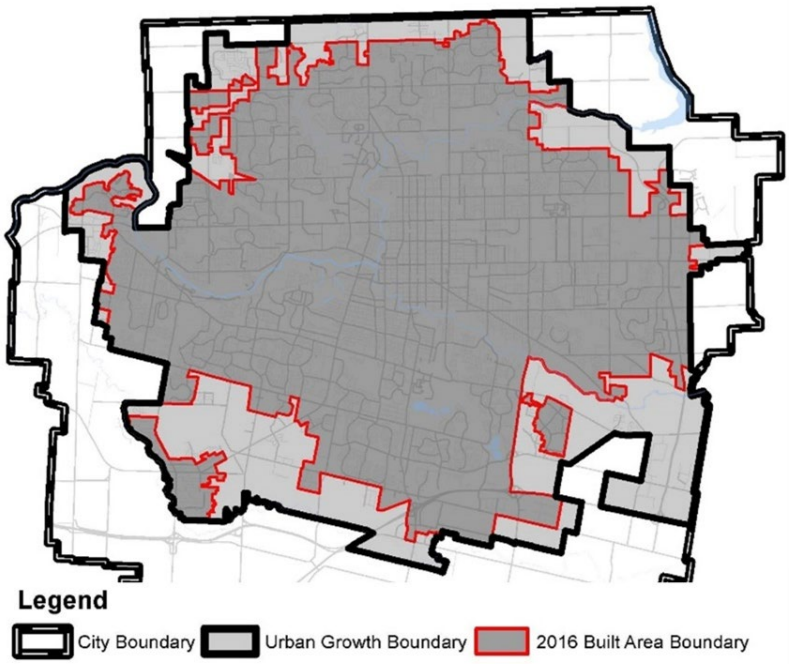


541 units complete

675 units in progress

1,360 units in planning

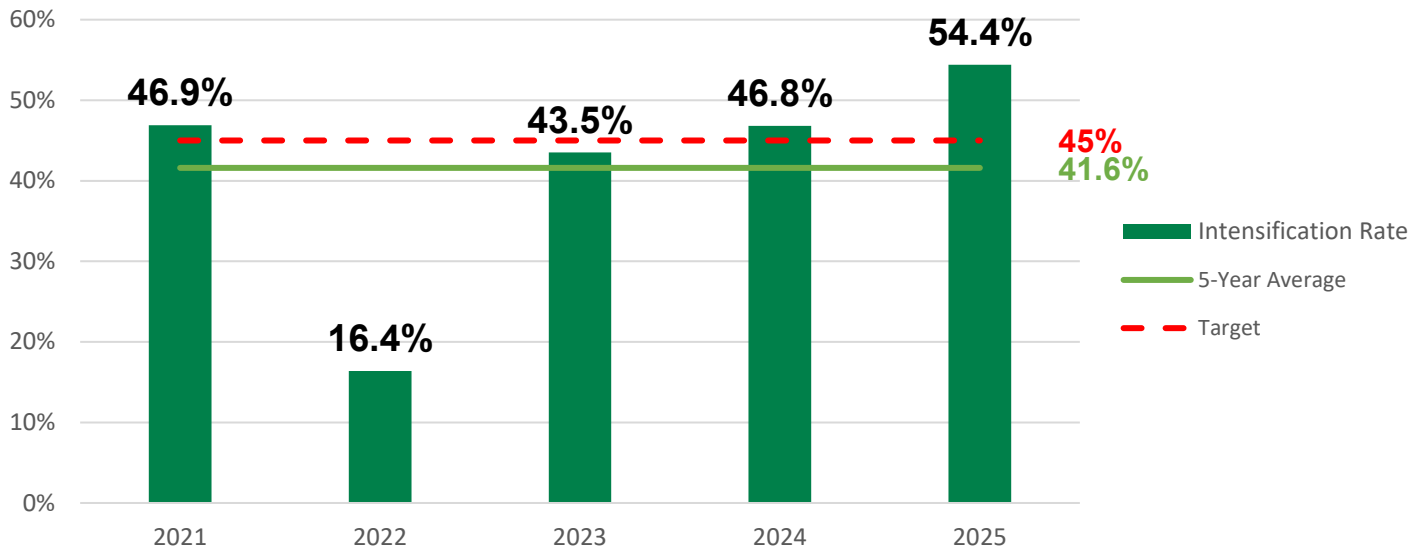
Residential Intensification Rate

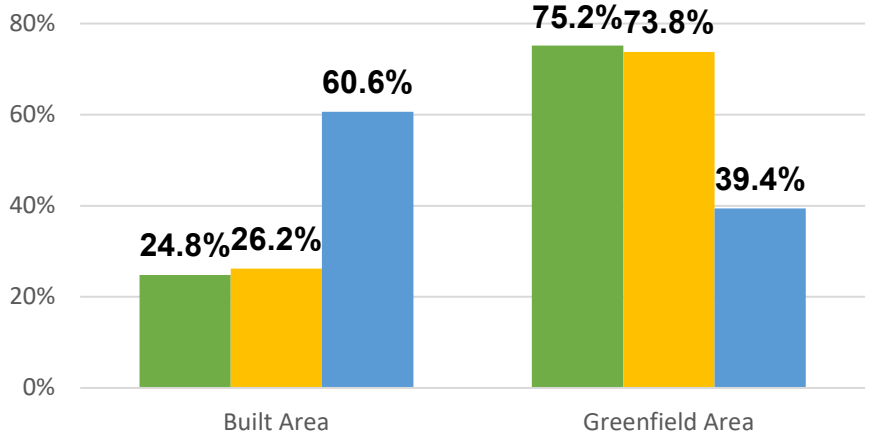


A **Built-Area Boundary** is a fixed line that acts an important land use planning tool to measure intensification and redevelopment.

The London Plan targets a minimum 45% of all new residential units to be constructed within the 2016 Built-Area Boundary of the city, meaning the lands that were substantially built out as of 2016.

The 2016 Built-Area Boundary identified in the London Plan is shown in dark grey on the left.





Residential Units with Permits Issued within the 2016 Built-Area Boundary

53 LDR units (Single, semi-detached and single cluster unit)

170 MDR units (Rowhouse and townhouse)

2,413 HDR units (Apartment and multi-unit)

- Higher intensification rates are typically driven by high levels of HDR permits are generally located within the Built-Area Boundary.

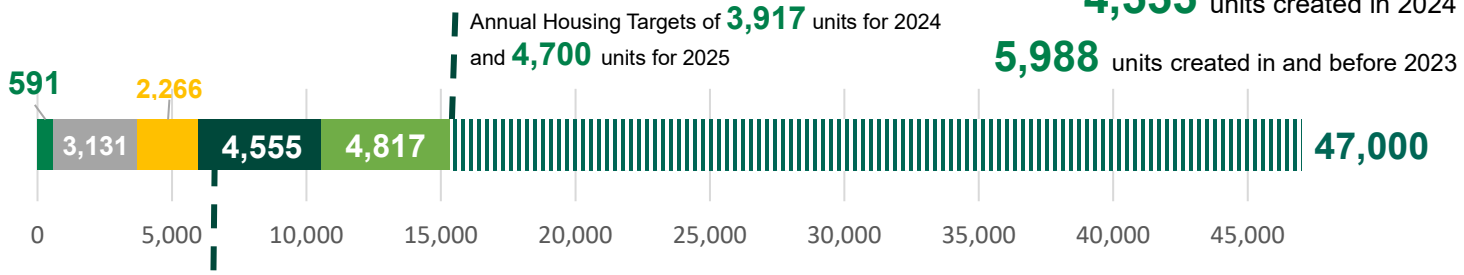
Residential Units in the Development Approvals Process

Roadmap to Municipal Housing Target of **47,000** units by 2031

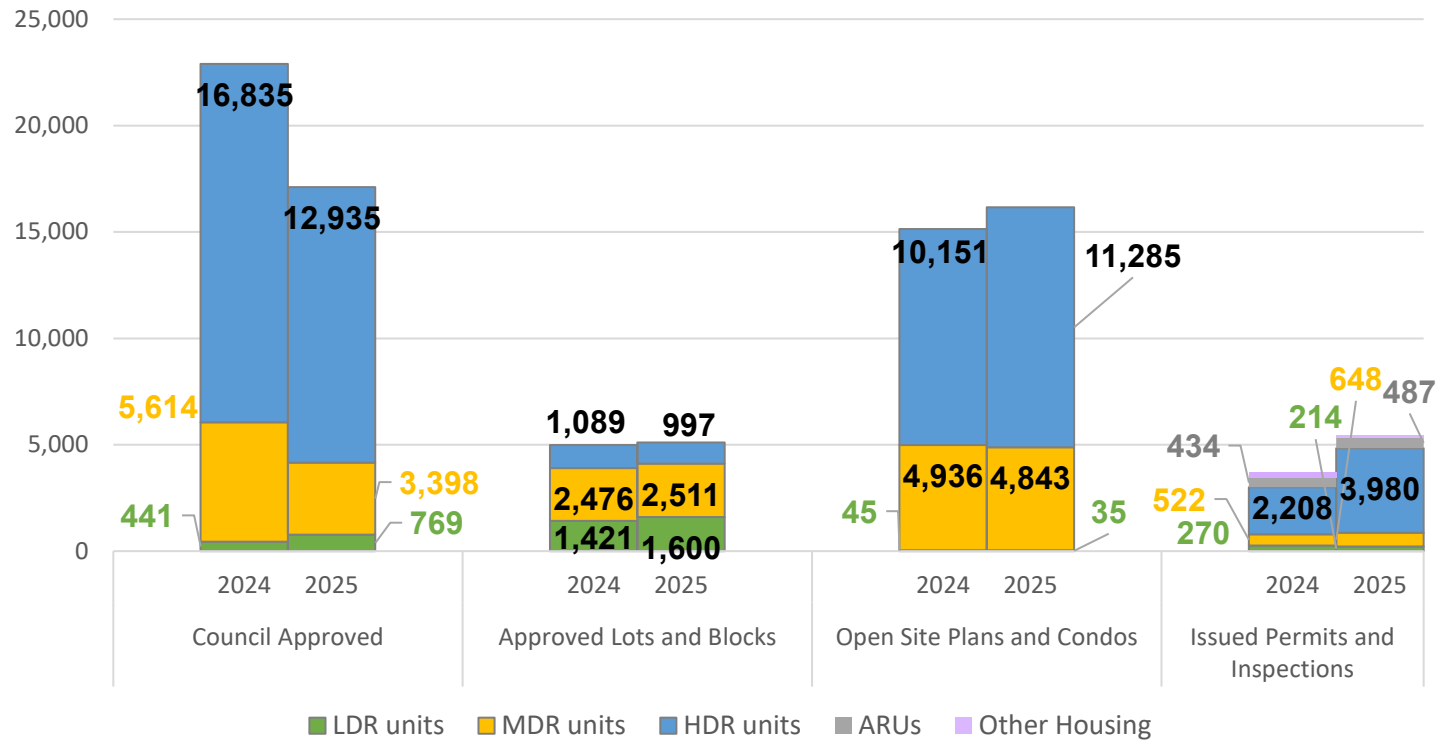
4,817 units created in 2025

4,555 units created in 2024

5,988 units created in and before 2023



*These units are based on CMHC housing starts, other provincial housing data, and pre-2022 housing starts adjustment.



22,890 units in 2024
17,102 units in 2025

Council Approved

Units in draft approved Subdivision Plans and approved site-specific Zoning By-law Amendments.

4,986 units in 2024
5,108 units in 2025

Approved Lots and Blocks

Units in Registered Subdivision, Condominium and Reference Plans.

15,132 units in 2024
16,163 units in 2025

Open Site Plans and Condos

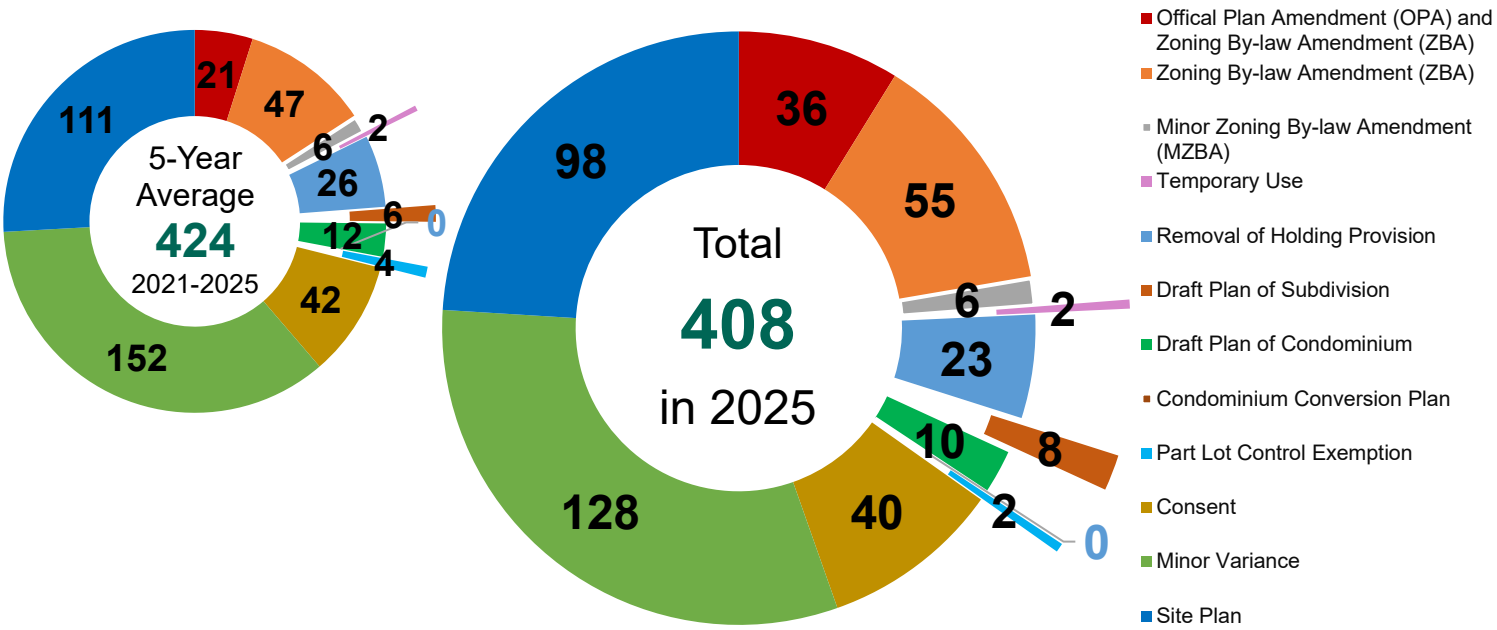
Units in Open Site Plans and Draft Approved Condos and Under Review Condos.

3,700 units in 2024
5,462 units in 2025

Issued Permits and Inspections

Units with building permits issued

Development Application Activity



Percentages of Applications Processing *Planning Act* Timelines & Change (▲▼) compared to 2024*

★★★	94%	OPA and ZBA	▲ 0%	★☆☆ 33%	Draft Plan of Subdivision ▲ +98%
★★★	95%	ZBA	▼ -1%	★★★ 100%	Draft Plan of Condominium ▲ +40%
★★★	100%	Minor ZBA	N/A**	★★★ 100%	Consent ▲ 0%
★★★	100%	Temporary Use	▲ 0%	★★★ 99%	Minor Variance ▲ +8%
★★☆	78%	Removal of Holding Provision	▲ +67%	★★★ 100%	Site Plan ▲ 0%

*There is no Condominium Conversion Plans application, and no statutory timeline for Part Lot Control Exemption application.
** There was no application received or 0% of applications processing timelines in 2024.

221 Consultations held in 2025 (Total)

101 Pre-Application Consultations

120 Site Plan Consultations

81% of Consents were processed within 75 days.

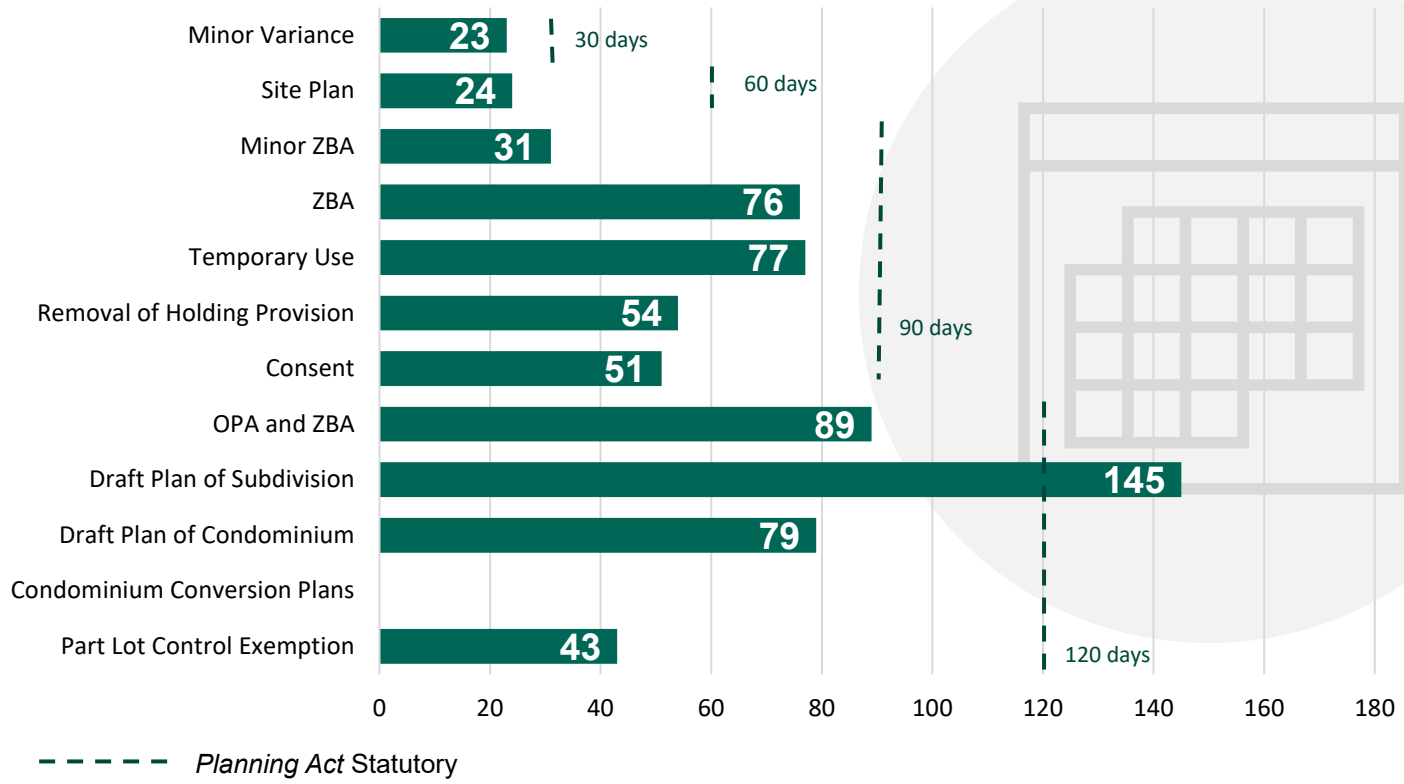
100% of Minor Variances were heard within 40 days.

Planning Act timeframes are measured in calendar days, which is not consistent with actual working days. This has an impact mainly on application types with short timeframes like Minor Variances.

Time for resubmissions and applications put on hold at the request of an applicant are counted within timelines. Time associated with these are beyond the City's control but still impact timeframes.

Planning and Development Process Metrics and Targets (in Calendar Days)*

** Applications under review during the time writing the report are excluded; their eventual inclusion may change the average timelines.*



Residential Units Proposed in Applications**

21,915 Units in OPAs and ZBAs (Total)

591 were LDR units.

2,455 were MDR units.

18,869 were HDR units.

3,754 Units in Site Plans Only (Total)

0 were LDR units.

791 were MDR units.

2,963 were HDR units.

92 units from **14** applications not requiring Site Plan (residential developments with 10 or fewer units, excluding mixed-use applications)

** These units have been proposed in applications submitted from January 1, 2025 to December 31, 2025.

2025 Continuous Improvement (CI) Initiatives

A key principle of Council's Strategic Plan is that City services put residents and businesses at the centre, using innovative approaches and continuous improvement to meet the needs of Londoners.

Throughout 2025, Housing and Community Growth has continued to move forward on initiatives to improve service delivery and programs to support more developments.

Streamlining Housing Approvals

In response to the Mayoral Direction, Staff developed a series of initiatives to fast-track housing. These include concurrent review of site plan and building permit applications, issuance of partial permits, improved coordination and prioritization of projects with more than 100 units and industry collaboration.

Additional process improvements include: a) management restructuring for enhanced oversight of engineering and plumbing inspections; b) optimizing residential permit approvals through process improvement group initiative in collaboration with the City Manager's Office; c) online meeting scheduling tool to simplify communication; d) updating online resources for clearer guidance; e) utilizing pre-approved product list for commonly used building materials and components; f) enhanced intake process to reduce delays and re-reviews; g) facilitating concurrent rezoning and site plan approvals; and h) shorter turnaround targets of 90 days for Official Plan and Zoning Bylaw amendments.

Housing Accelerator Fund (HAF) – Enhancing housing outcomes

Having completed 7 initial HAF initiatives and the Housing Needs Assessment, London entered Year 2 with additional funding and initiatives. The new initiatives aimed at enhancing affordable housing incentives, supporting Indigenous-led residential unit development, and expanding transit-oriented and office-to-residential conversions. Staff conducted allocation review and incentive program optimization to redirect surplus and new funding to support additional housing developments.

Official Plan and Zoning Continuous Improvement Initiatives

Various improvements were made to streamline processes, improve time and cost efficiencies, increase clarity and consistency in the application of The London Plan and Zoning By-law Z.-1. These include modernization of the notice requirements for planning applications, revising the definition of stacked townhouse to permit more than two units high, removing Table 6- Street Classification Design Features and adding the Complete Streets Design Manual.

Delegated Minor Zoning Bylaw Amendments (MZBAs)

Council has delegated MZBAs to staff to add a new use where the proposed use is already contemplated in The London Plan and Zoning By-law. This approach reduces processing times and administrative burden for low-risk, policy-aligned changes, providing greater certainty for applicants. Similarly, the delegation to process MZBAs associated with a Site Plan application enables a more coordinated and efficient review, ensuring that technical adjustments are addressed alongside detailed design and servicing matters, while allowing the ZBA process to remain focused on more substantive or policy-driven changes.

Holding Removals Reallocated to Site Plan Staff

The processing of several holding provision removal applications has been moved to Site Plan staff to improve efficiency, consistency, and coordination in the development review process. This approach reduces duplication of review, shortens timelines, and improves clarity for applicants, while supporting more integrated decision-making across planning, engineering, and urban design considerations.

Subdivision Continuous Improvement Initiatives

Staff have implemented a range of continuous improvement initiatives, including updates to the subdivision agreement, enhancements to the draft plan of subdivision process, and revisions to the security policy. These improvements to the draft plan process have shortened timelines and enabled the City to consistently meet—and in many cases exceed—provincial targets for application reviews. The changes have significantly reduced the number of draft plan conditions, improving efficiency as projects progress through the subdivision design stage. The updated subdivision agreement template and process have also streamlined reviews for both staff and the development industry.

City-owned Parking Lot Redevelopment

Following the Mayoral Direction, Staff explored the potential redevelopment of City-owned parking lots. Out of the five lots, 84 Horton Street and 199 Ridout Street received clear market interest and potential for high density housing. The SoHo financial incentives were amended to include these sites in the Rehabilitation and Redevelopment Tax Grant Program, enhancing its marketability and developability.

Downtown Plan: Quick-start actions

Staff has developed a series of “Quick Start Actions” aimed at improving downtown conditions while development of the Downtown Plan is underway. Key actions include initiatives to improve public safety, enhance municipal compliance, support economic development, better coordinate operational service delivery, deploy dedicated Coordinated Informed Response team, enhance downtown activations and beautification. These were achieved through reviewing existing practices, policies, and existing resources.

Industrial Land Development Strategy (ILDS)

Following the Mayoral Directions, Staff updated the ILDS to ensure London remained able to capitalize on major employment growth opportunities and meet the needs of prospective industrial enterprises. This includes a focus on identifying gaps in the supply chain and attracting manufacturing operations to fill that gap, and utilize the Ontario Certified Site program to showcase the City’s portfolio of industrial land.

Environmental Management Guidelines (EMG) Update

The 2025 EMG includes comprehensive technical guidance for implementing the natural heritage policies and process guidance to help applicants follow the City’s environmental planning processes under the Planning Act. The updates have also clarified key processes and technical elements related to the City’s natural heritage policies in ways intended to facilitate and streamline their implementation.

Urban Growth Boundary (UGB)

Following the draft and final Land Needs Assessments (Community Growth and Employment Areas), Council directed an expansion of the current UGB to designate additional lands for urban uses. Landowners’ requests and candidate blocks of land were identified and evaluated for potential inclusion within the UGB. Various consultations were conducted with the community and developers, as well as Indigenous engagement to finalize the UGB expansion. Following Council’s adoption in December 2025, the UGB expansion has been circulated for Ministerial approval under Section 26 of the Planning Act.

Digital Planning Application Tracking (DPAT)

In 2025, the City’s development and business portal (also known as the Citizen Portal) has been expanded to include Pre-Application Consultation (PAC), Official Plan Amendment (OPA), combined Official Plan / Zoning By-law Amendment (OPA/ZBA), Removal of Holding Provision, and Plan of Condominium applications. Additional Planning Act application types are being added as the DPAT program progresses.

Improvements to Affordable Housing Community Improvement Plan (CIP)

Several enhancements were made to the Affordable Housing CIP, which was approved by Council in March. These improvements included updates to the Additional Residential Unit (ARU) loan program, the introduction of a new Detached ARU Grant program, and the launch of two additional programs supporting affordable and highly supportive housing. As part of these efforts, processes were streamlined and simplified wherever possible to make the application and review experience easier for applicants. By refining program structures and reducing administrative barriers, the CIP aims to make it more efficient for applicants to navigate the housing support landscape and successfully achieve their housing goals.

Accelerate City-led Shovel-Ready Lands

The City created a streamlined approach to accelerate affordable housing development on City-led, shovel-ready lands. This includes utilizing an existing two-stage procurement process and amending policies to remove surplus declaration requirements. Continuous improvement has been driven by ongoing self-evaluation and structured feedback from interested parties, enabling targeted enhancements to the process. This includes the development and utilization of a Negotiated Request for Proposal process to provide more meaningful discussion, engagement, and evaluation of potential project partners.

Land Disposable Implementation Strategy

The Land Disposable Process Implementation Strategy outlines the City's formal approach for reallocating City-owned lands to accelerate affordable housing development. The strategy introduces a two-stage evaluation process of surplus properties, cash flow and corporate benefits models, and operational improvements to streamline land acquisition, assessment, and disposition. Key actions include exempting affordable housing lands from surplus declaration requirements, creating shovel-ready sites through design and servicing, and leveraging various partnership models – ranging from City-led projects to divestment with affordable conditions. Where applicable, proceeds from land sales will be directed to the Affordable Housing Reserve Fund to sustain future initiatives. The plan further supports the City's Roadmap to 3,000 by allocating 20 underutilized properties for future affordable housing development opportunities.

Supporting More Affordable Housing

A series of initiatives were implemented to support more affordable housing. These include a) the relaunch of the Homeownership Downpayment Assistance Program to help a minimum of 124 households achieve homeownership; b) the Ontario Renovates Program to assist a minimum of 20 households for essential home repairs and accessibility modifications for seniors and individuals with disabilities; c) the Dollars to Door Program to offset the costs of development for new Affordable Rental Housing Units; and d) exempting affordable and social housing developments from licensing fees.

Template Contribution Agreement for Affordable Housing Projects

Contribution Agreements (CA) are critical component in securing the necessary financing for affordable housing projects and reinforces the City's ongoing support for the creation of affordable and supportive housing in London. A template has been developed serving as the standard contract outlining the terms, conditions, and obligations associated with municipal funding for affordable housing projects awarded through the procurement process. It streamlines the agreement execution process and creates a clear and standard framework for administering funding for affordable housing in London.

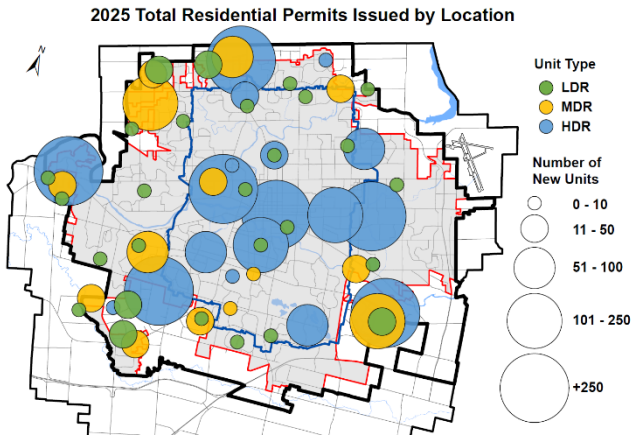
Appendix

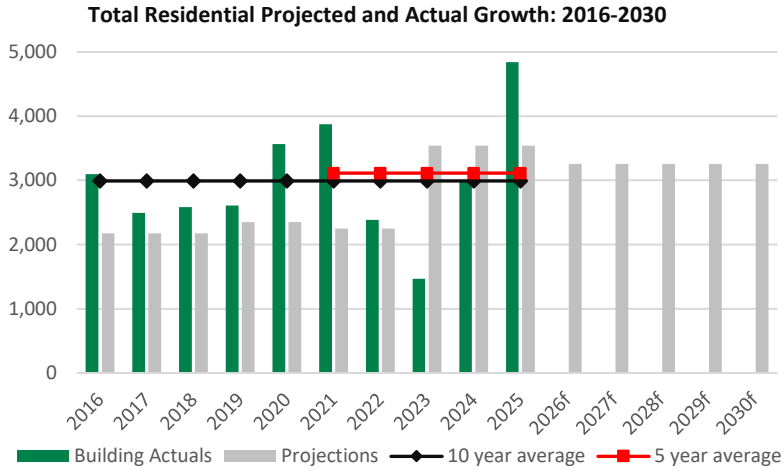
Building Permit Activity: New Residential Units

Total Residential Units

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026f	2027f	2028f	2029f	2030f
Altus/Watson Projections	2,176	2,176	2,176	2,349	2,349	2,249	2,249	3,538	3,538	3,538	3,258	3,258	3,258	3,258	3,258
Building Actuals	3,096	2,493	2,584	2,607	3,564	3,872	2,384	1,466	3,000	4,842					
5 Year Average						3,113									
10 Year Average	2,991														

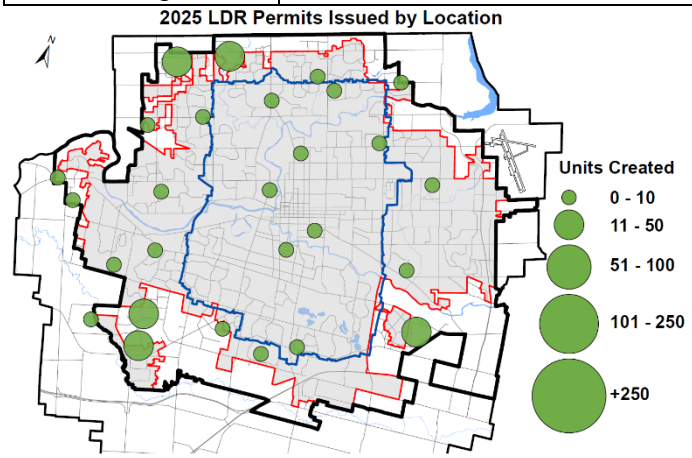
Note: Totals exclude Additional Residential Units and other housing units created through non-residential permits.

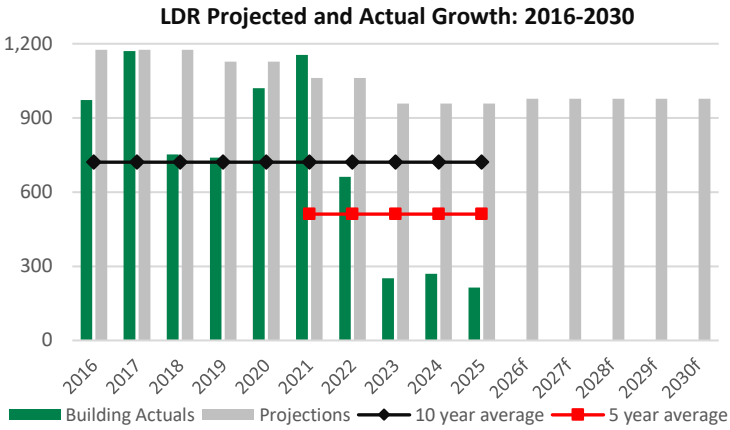




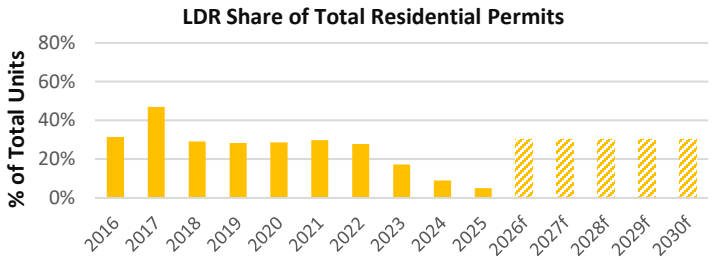
Low Density Residential (LDR) Units

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026f	2027f	2028f	2029f	2030f
Altus/Watson Projections	1,176	1,176	1,176	1,128	1,128	1,062	1,062	958	958	958	978	978	978	978	978
Building Actuals	972	1,170	752	739	1,020	1,155	662	252	270	214					
5 Year Average						511									
10 Year Average	721														



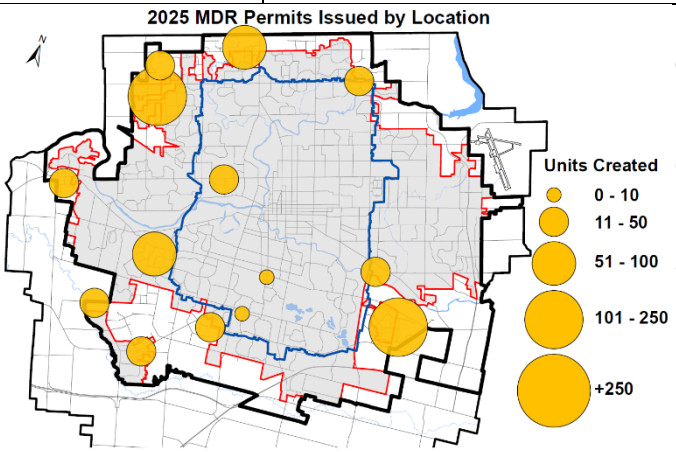


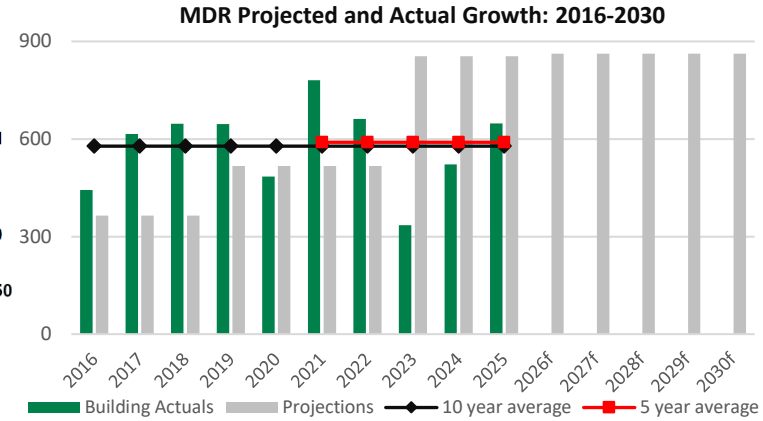
Low Density Residential (LDR) means single and semi-detached dwellings. LDR includes single-detached cluster dwellings in vacant condominium lands but does not include duplexes.



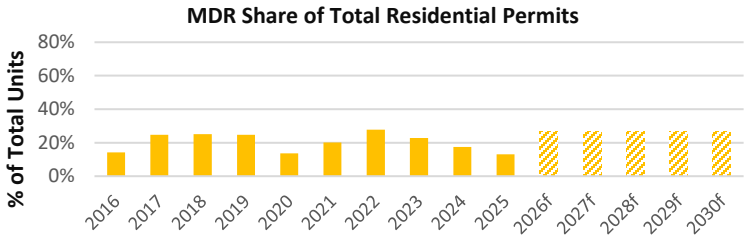
Medium Density Residential (MDR) Units

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026f	2027f	2028f	2029f	2030f
Altus/Watson Projections	364	364	364	517	517	517	517	854	854	854	862	862	862	862	862
Building Actuals	443	615	647	646	485	781	662	335	522	648					
5 Year Average						590									
10 Year Average	578														



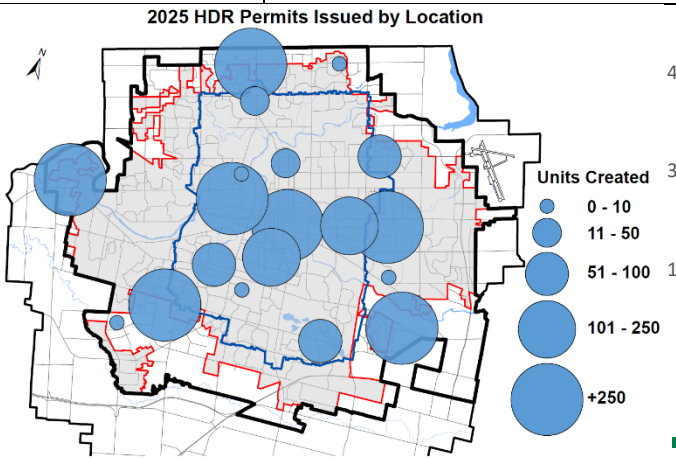


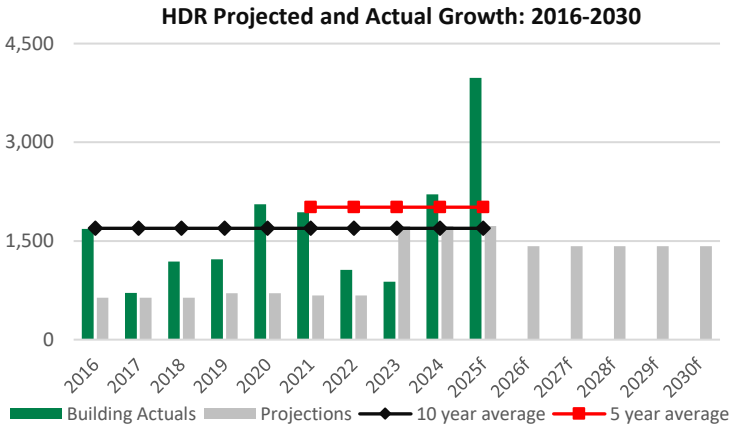
Medium Density Residential (MDR) means rowhouses and townhouses. Triplexes and fourplexes are not included in MDR.



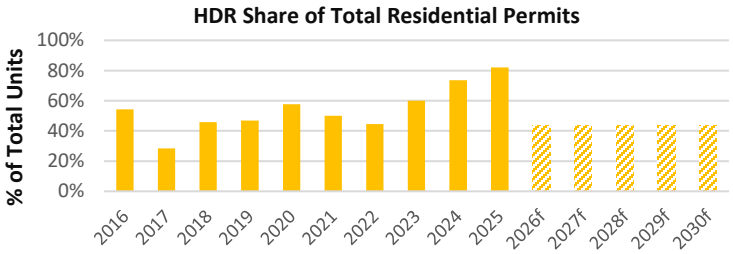
High Density Residential (HDR) Units

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026f	2027f	2028f	2029f	2030f
Altus/Watson Projections	636	636	636	704	704	670	670	1,726	1,726	1,726	1,418	1,418	1,418	1,418	1,418
Building Actuals	1,681	708	1,185	1,222	2,059	1,936	1,060	879	2,208	3,980					
5 Year Average						2,013									
10 Year Average	1,692														





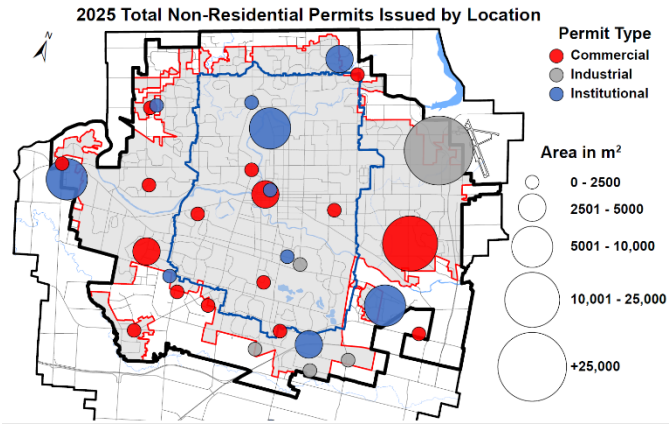
High Density Residential (HDR) means apartments and other multi-unit dwellings, including duplexes, triplexes and fourplexes.

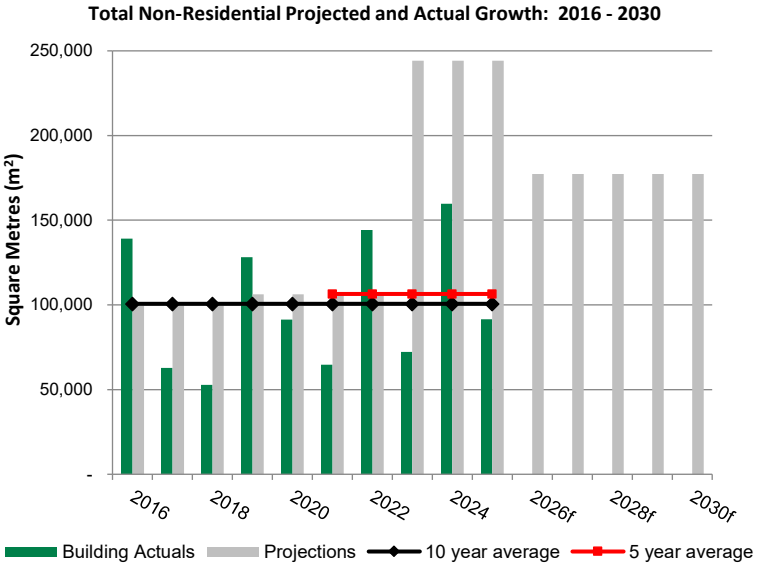


Building Permit Activity: New Gross Floor Area (GFA) of Non-Residential Development

Total Non-Residential GFA

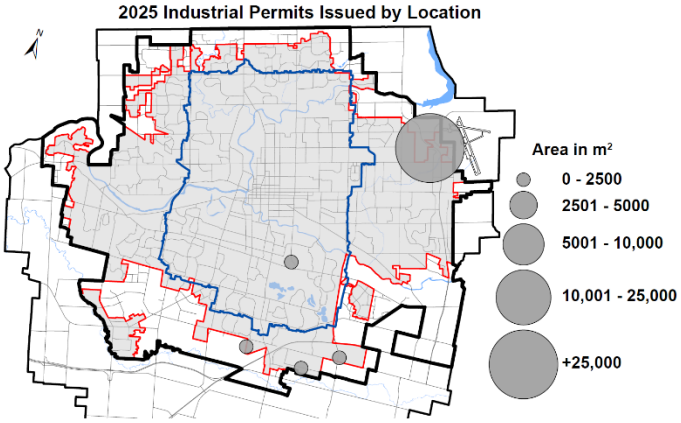
(m²)	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026f	2027f	2028f	2029f	2030f
Altus/Watson Projections	99,588	99,588	99,588	106,235	106,235	106,235	106,235	244,116	244,116	244,116	177,352	177,352	177,352	177,352	177,352
Building Actuals	139,150	62,734	52,789	128,220	91,269	64,766	144,247	72,202	159,691	91,450					
5 Year Average						106,471									
10 Year Average	100,652														

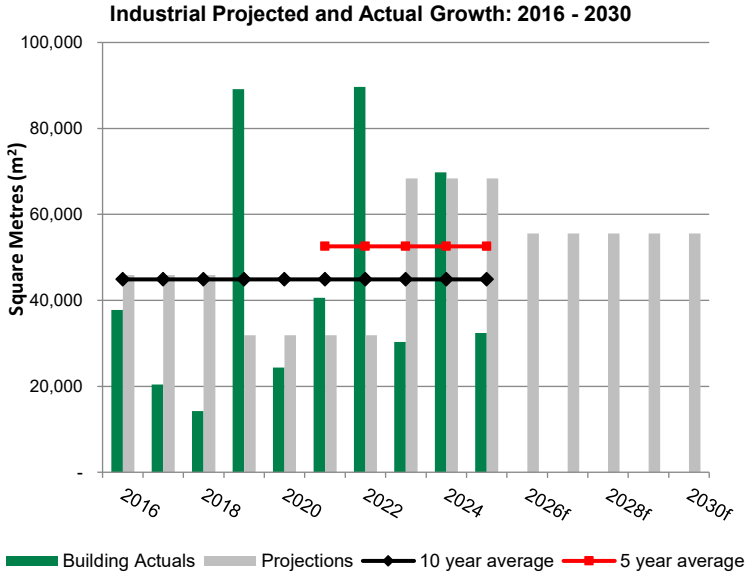




New Industrial GFA

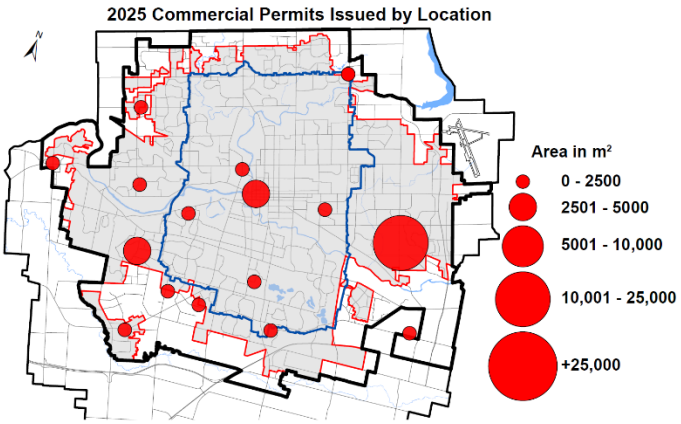
(m²)	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026f	2027f	2028f	2029f	2030f
Altus/Watson Projections	45,855	45,855	45,855	31,894	31,894	31,894	31,894	68,377	68,377	68,377	55,556	55,556	55,556	55,556	55,556
Building Actuals	37,780	20,433	14,216	89,142	24,393	40,578	89,653	30,343	69,799	32,432					
5 Year Average						52,561									
10 Year Average	44,877														

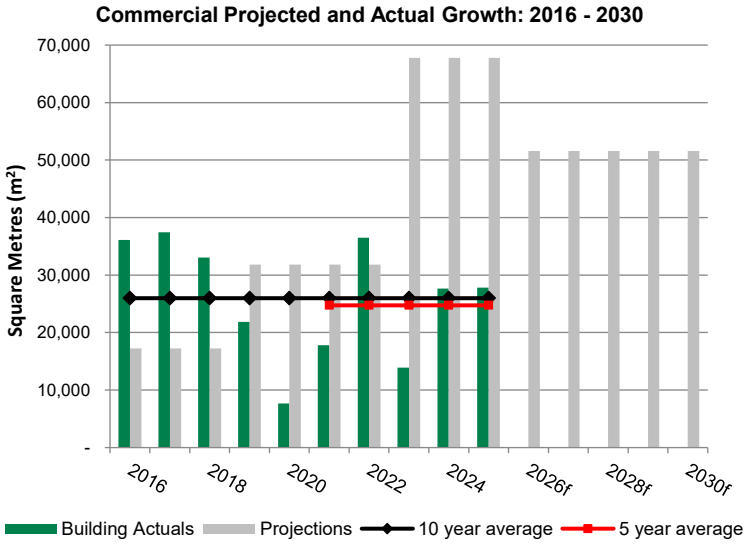




New Commercial GFA

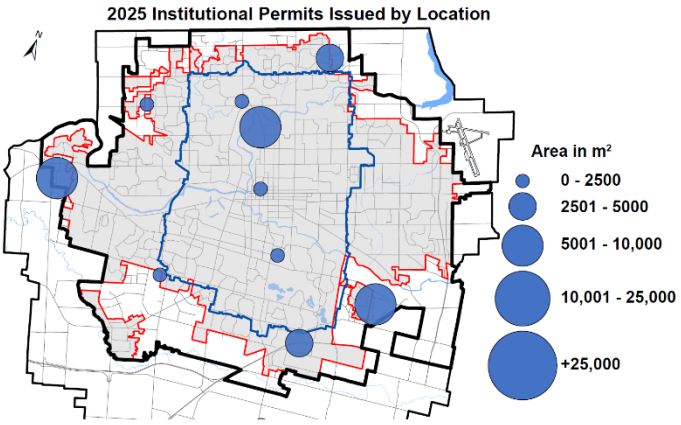
(m²)	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026f	2027f	2028f	2029f	2030f
Altus/Watson Projections	17,242	17,242	17,242	31,829	31,829	31,829	31,829	67,786	67,786	67,786	51,561	51,561	51,561	51,561	51,561
Building Actuals	36,125	37,430	33,059	21,846	7,672	17,809	36,524	13,894	27,635	27,823					
5 Year Average						24,737									
10 Year Average	25,982														

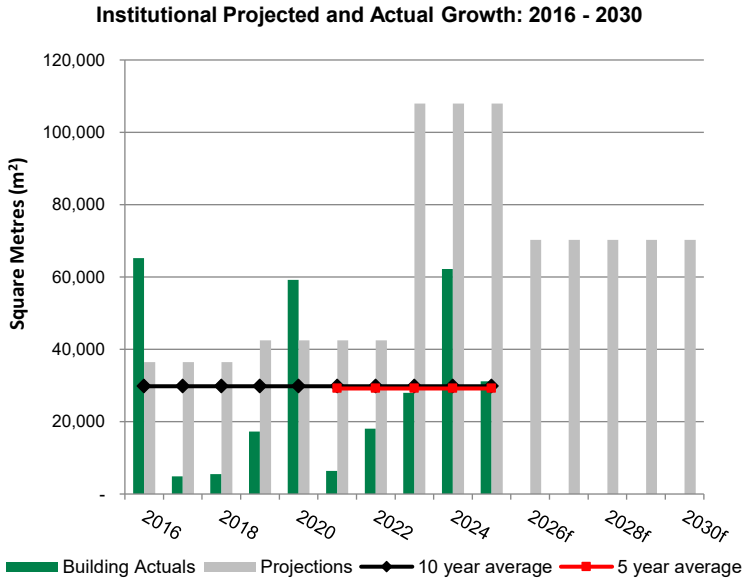




New Institutional GFA

(m²)	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026f	2027f	2028f	2029f	2030f
Altus/Watson Projections	36,491	36,491	36,491	42,512	42,512	42,512	42,512	107,953	107,953	107,953	70,235	70,235	70,235	70,235	70,235
Building Actuals	65,245	4,871	5,514	17,232	59,204	6,379	18,070	27,965	62,257	31,195					
5 Year Average						29,173									
10 Year Average	29,793														





Affordable Housing

Road Map Programs	Units Complete[1]	Units in Progress[2]	Units in Planning[3]	Total Units Tracked
1. Affordable Rental				
City-led Shovel Ready Developments	103	100	682	885
Community-led Developments	394	373	462	1,229
2. Affordable Ownership				
City-led Shovel Ready Developments	0	0	101	101
Community-led Developments	0	14	0	14
3. Highly Supportive Housing				
City-led Shovel Ready Developments	44	0	0	44
Community-led Developments	0	188	115	303
Total Roadmap (City-Funded)[4]	**541**	**675**	**1,360**	**2,576**
Non-City-Funded Affordable Rental[5]	**693**	**0**	**0**	**693**
Non-City-Funded Highly Supportive Housing[6]	**75**	**0**	**0**	**75**
Total Units Tracked				**3,344**

Notes:

1. Units Complete: Occupancy has been granted.
2. Units in Progress: Building permit has been issued.
3. Units in Planning: Development application has been received, design and development review in process.
4. Units tracked have been adjusted to reflect their accurate category and status and whether they fall under the Roadmap programs or other non city-funded affordable housing.
5. Source: CMHC. Non-City-Funded Affordable Rental Units are independent from the Roadmap to 3,000.
6. Represents 26 Highly Supportive Units at the Salvation Army funded by the Provincial Government and 49 Highly Supportive Units provided by London Cares at 362 Dundas Street.

Residential Units in the Development Approvals Process

Dwelling Type	Council Approved Units in 2024	Council Approved Units in 2025	Approved Lots and Blocks in 2024	Approved Lots and Blocks in 2025	Open Site Plans & Condos in 2024	Open Site Plans & Condos in 2025	Issued Permits & Inspections in 2024	Issued Permits & Inspections in 2025
Low Density Residential	441	769	1,421	1,600	45	35	270	214
Medium Density Residential	5,614	3,398	2,476	2,511	4,936	4,843	522	648
High Density Residential	16,835	12,935	1,089	997	10,151	11,285	2,208	3,980
Additional Residential Units	n/a	n/a	n/a	n/a	n/a	n/a	434	487
Other Housing Units	n/a	n/a	n/a	n/a	n/a	n/a	266	133
Total	**22,890**	**17,102**	**4,986**	**5,108**	**15,132**	**16,163**	**3,700**	**5,462**

Development Application Activity

2021-2025 Applications Received and Processed within Planning Act Timeframes

Application Type	Statutory Period (Days)	2021		2022		2023		2024		2025			5-Year Average of Applications Received
		Applications Received	% (1, 4)	Applications Received	% (1, 4)	Applications Received	% (1, 4)	Applications Received	% (1, 4, 5)	Applications Received	Applications in process (2)	% (1, 4)	
OPA and ZBA (6)	120	25	20%	14	14%	13	69%	18	94%	36	4	94%	21
Zoning By-law Amendment (ZBA) (6)	90	36	3%	50	6%	42	45%	51	96%	55	11	95%	47
Minor Zoning By-law Amendment (7)	90									6	4	100%	6
Temporary Use	90	3	67%	1	0%	2	50%	1	100%	2	-	100%	2
Removal of Holding Provision	90	37	51%	20	45%	19	74%	31	47%	23	-	78%	26
Draft Plan of Subdivision (8)	120	8	0%	4	0%	5	20%	6	17%	8	1	33%	6
Draft Plan of Condominium	120	21	29%	8	63%	13	46%	7	71%	10	3	100%	12
Condominium Conversion Plans	120	1	100%	-	n/a	-	n/a	-	n/a	-	-	n/a	-
Part Lot Control Exemption	n/a	10	n/a	5	n/a	5	n/a	-	n/a	2	-	n/a	4
Consent	90	43	77%	42	83%	36	94%	51	100%	40	3	100%	42
Minor Variance	30	170	9%	158	7%	157	80%	147	92%	128	8	99%	152
Site Plan	60 (3)	122	55%	117	93%	120	100%	98	100%	98	2	100%	111
TOTAL APPLICATIONS		**476**		**419**		**412**		**410**		**408**			**424**
Pre-Application Consultations		138		128		162		108		101			127
Site Plan Consultations		212		224		159		125		120			168
GRAND TOTAL		**826**		**771**		**733**		**643**		**629**			**719**

Notes:

(1) % of applications considered within Planning Act Timeframe. It includes applications processed and applications pending decisions, but the processing timelines have already exceeded Planning Act Timeframe.

(2) Applications in process include applications that are pending decisions and the processing timelines as of December 31, 2025 have not exceeded Planning Act Timeframe. These applications are not included in calculating the percentage of applications considered within Planning Act Timeframe.

(3) Revised Bill 109 Statutory Period applies to applications received on or after July 1, 2022. Prior to Bill 109, the Statutory Period for Site Plan Application is 30 days.

(4) Withdrawn applications are not included.

(5) The percentage of applications considered within Planning Act Timeframe for the year has been updated to include applications that were still in process at the time of the 2024 Annual Development Report.

(6) These types of application do not include 18 city-initiated ones.

(7) Approvals for zoning by-law amendments that are of a minor nature are delegated to Civic Administration effective August 26, 2025.

(8) There were 3 applications requiring at least one resubmission after the acceptance of the application, which impacted the overall processing timelines of draft plan of subdivision files. The average processing timelines for approved draft plans of subdivision considering the last revision date would be 99 days in 2025.

2025

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