



Greater Toronto Area Low Rise Projects

New Homes Monthly Market Report
Data as of May 2018

Altus Data Solutions Monthly Market Report - GTA New Homes Overview

Monthly Sales	May-18		May-17		Change
High Rise	2,003		3,766		-46.8%
Low Rise	342		513		-33.3%
Total	2,345		4,279		-45.2%
Year to Date Sales	Jan.-May. 2018		Jan.-May. 2017		Y/Y Change
High Rise	7,496		17,536		-57.3%
Low Rise	1,750		5,530		-68.4%
Total	9,246		23,066		-59.9%
Year to Date Supply	Jan.-May. 2018		Jan.-May. 2017		Y/Y Change
High Rise	7,935		16,193		-51.0%
Low Rise	2,527		5,289		-52.2%
Total	10,462		21,482		-51.3%
Year to Date Completions	Jan.-May. 2018		Jan.-May. 2017		Y/Y Change
High Rise	5,519		6,560		-15.9%
Remaining Inventory	May-18	Apr-18	May-17	M/M Change	Y/Y Change
High Rise	9,345	10,301	9,632	-9.3%	-3.0%
Low Rise	4,505	4,393	1,630	2.5%	176.4%
Total	13,850	14,694	11,262	-5.7%	23.0%
Benchmark Price	May-18	Apr-18	May-17	M/M Change	Y/Y Change
High Rise	\$758,370	\$739,965	\$604,683	2.5%	25.4%
Low Rise	\$1,144,191	\$1,151,815	\$1,222,699	-0.7%	-6.4%
Projects	New Openings	All Active	Under Const.	Pre-Const.	
High Rise Projects	5	293	250	174	
High Rise Units	710	72,710	62,982	41,374	
% Sold*	47%	88%	96%	84%	
Low Rise Projects	10	217			
Low Rise Units	306	25,410			
% Sold*	37%	82%			

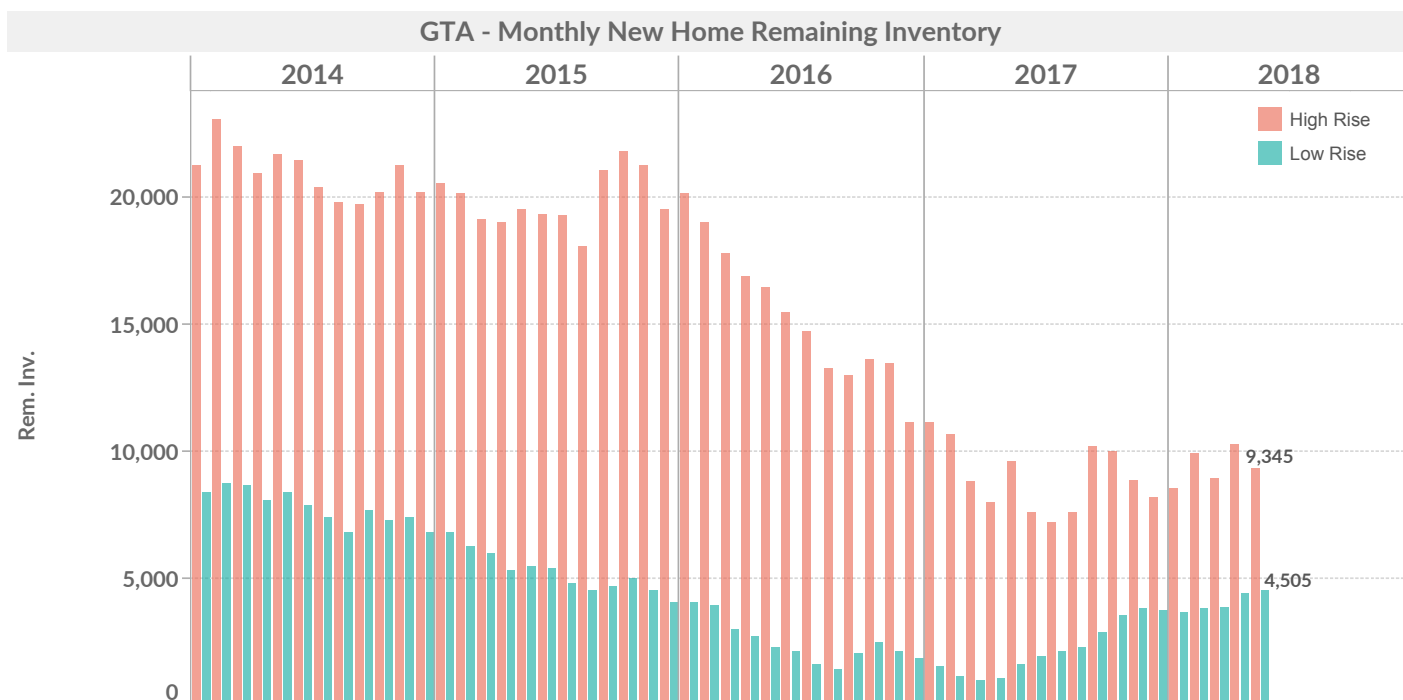
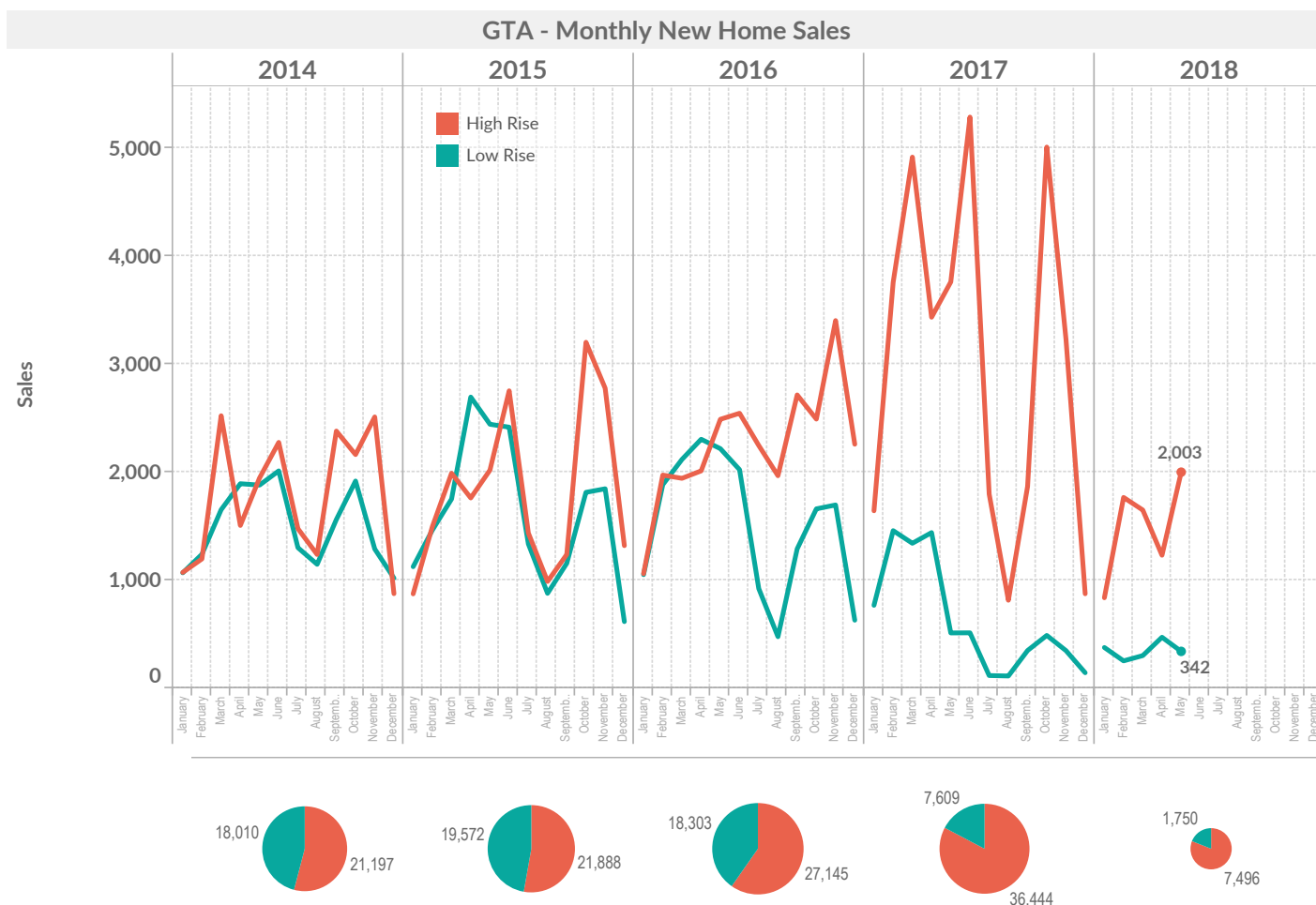
* Condominium projects opening within the last 10 days of the month cannot register firm sales. This calculation uses only those projects opening early enough to record firm sales.

All Active includes all projects actively marketing available remaining inventory regardless of their construction status.

Under Construction includes all projects, regardless of whether sold out or not, that are currently under construction.

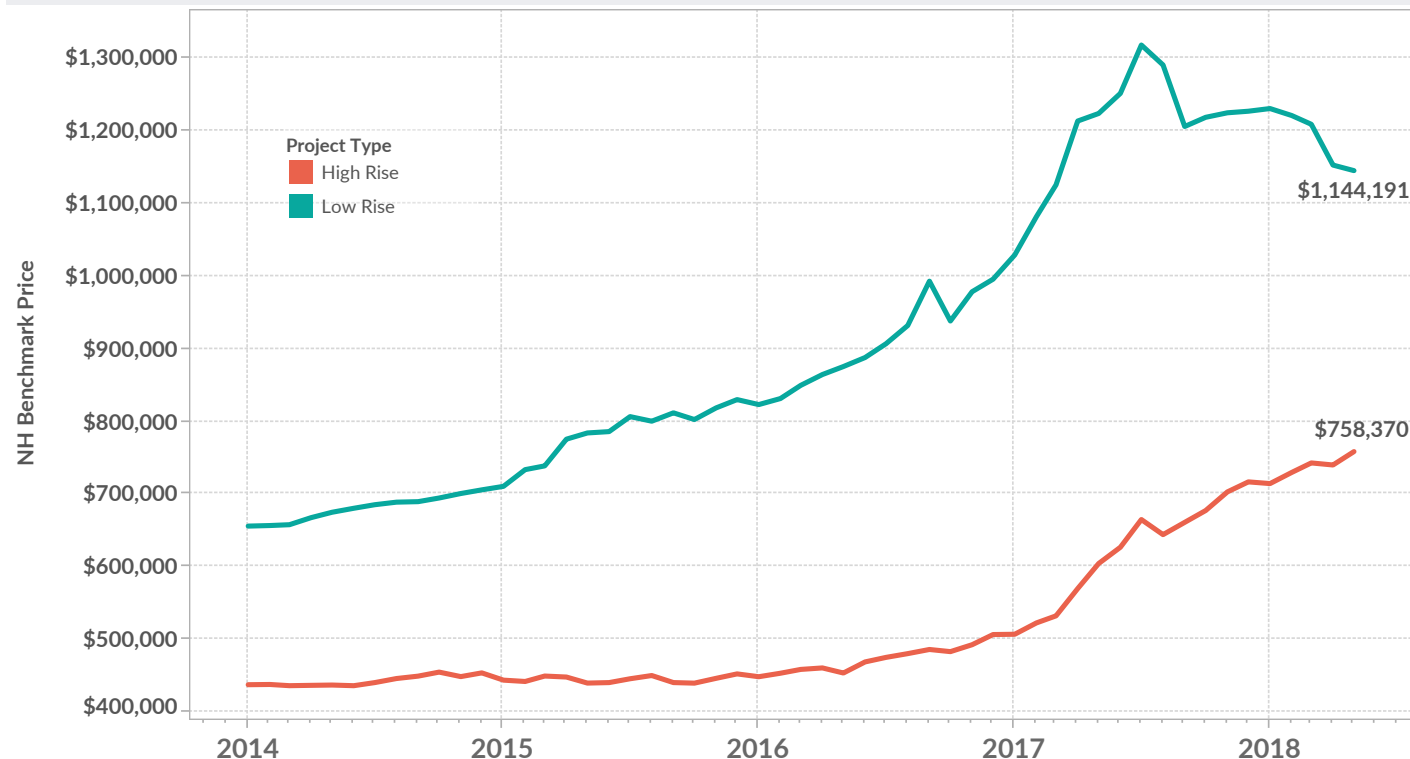
Pre-Construction includes all projects, regardless of whether sold out or not, that have not commenced construction.

Sales & Remaining Inventory

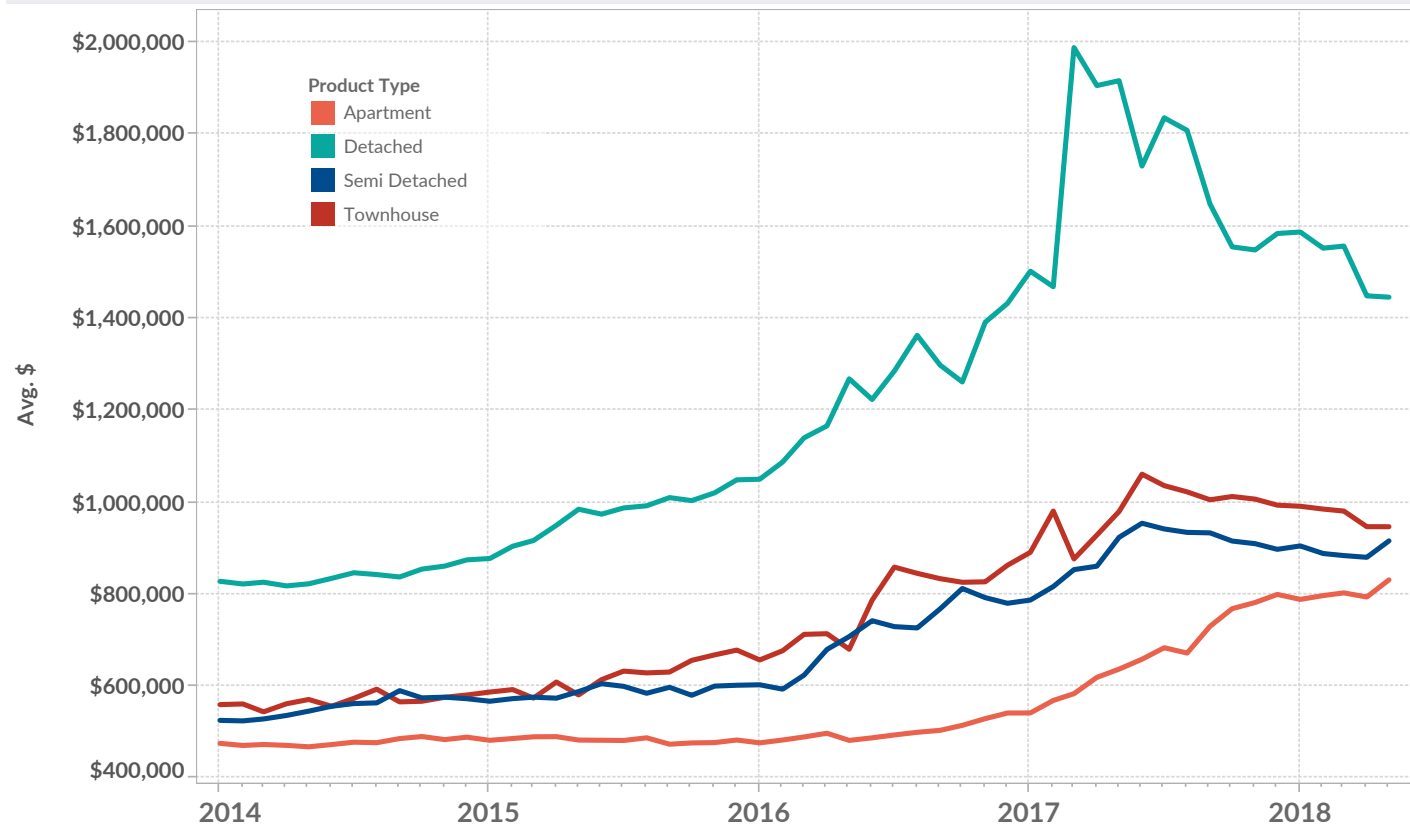


Pricing

Monthly New Home Benchmark Price (excludes extremes)

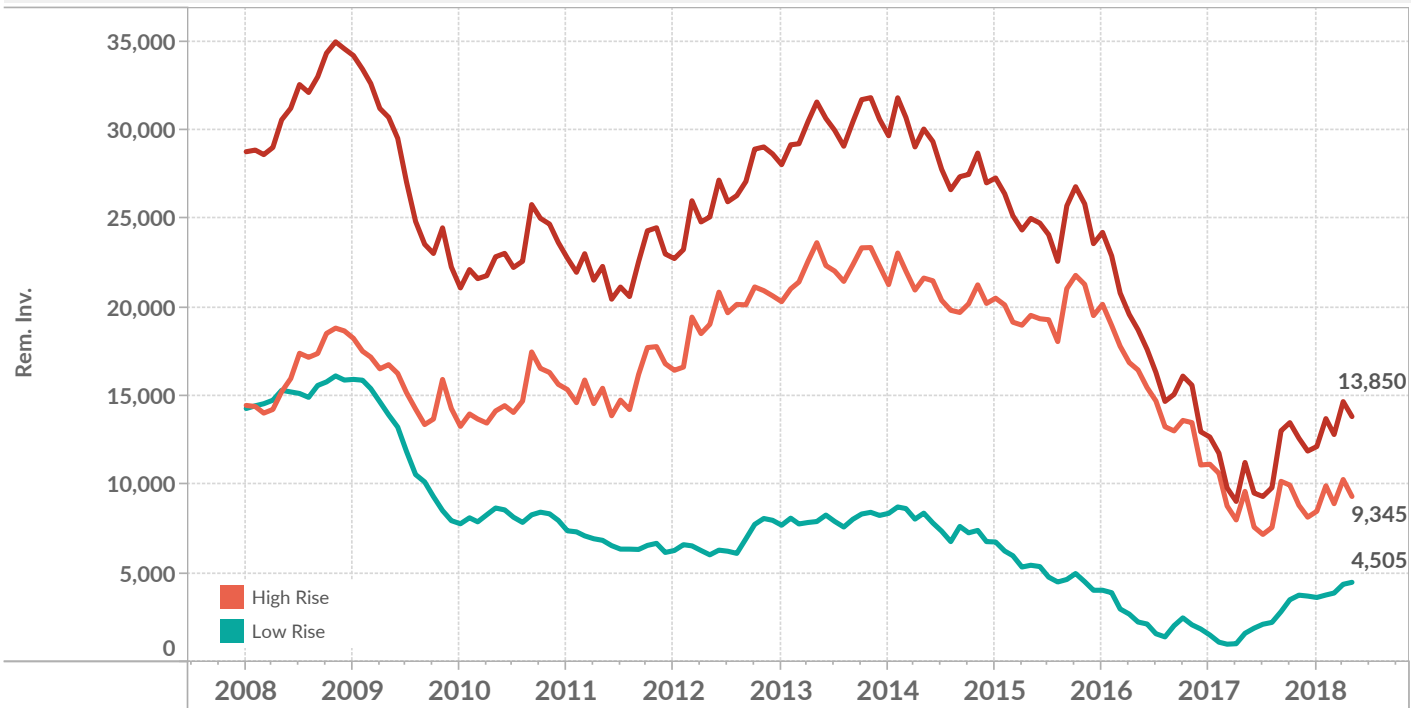


Monthly Avg. Asking Price by Product Type (includes all projects)

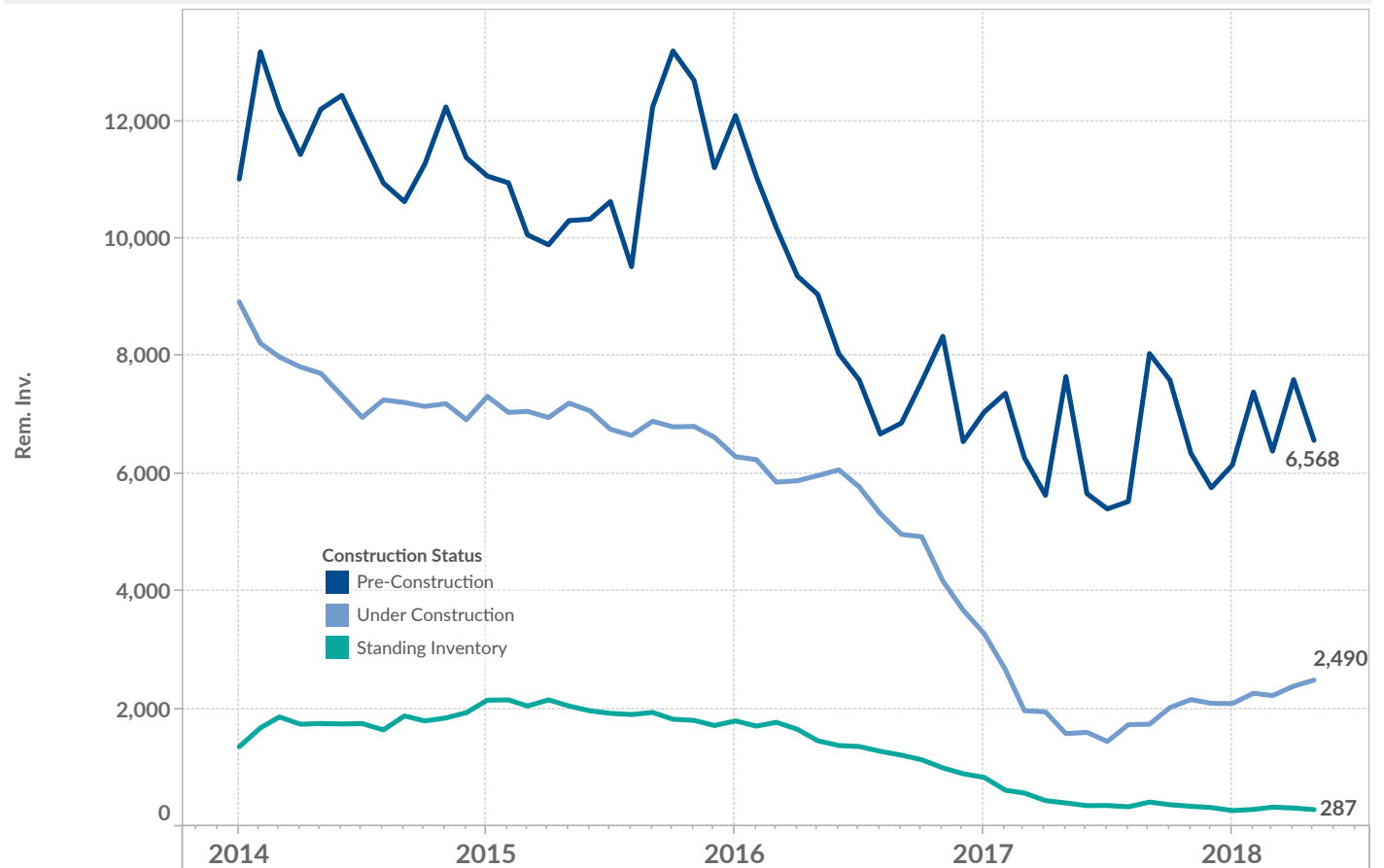


Remaining Inventory

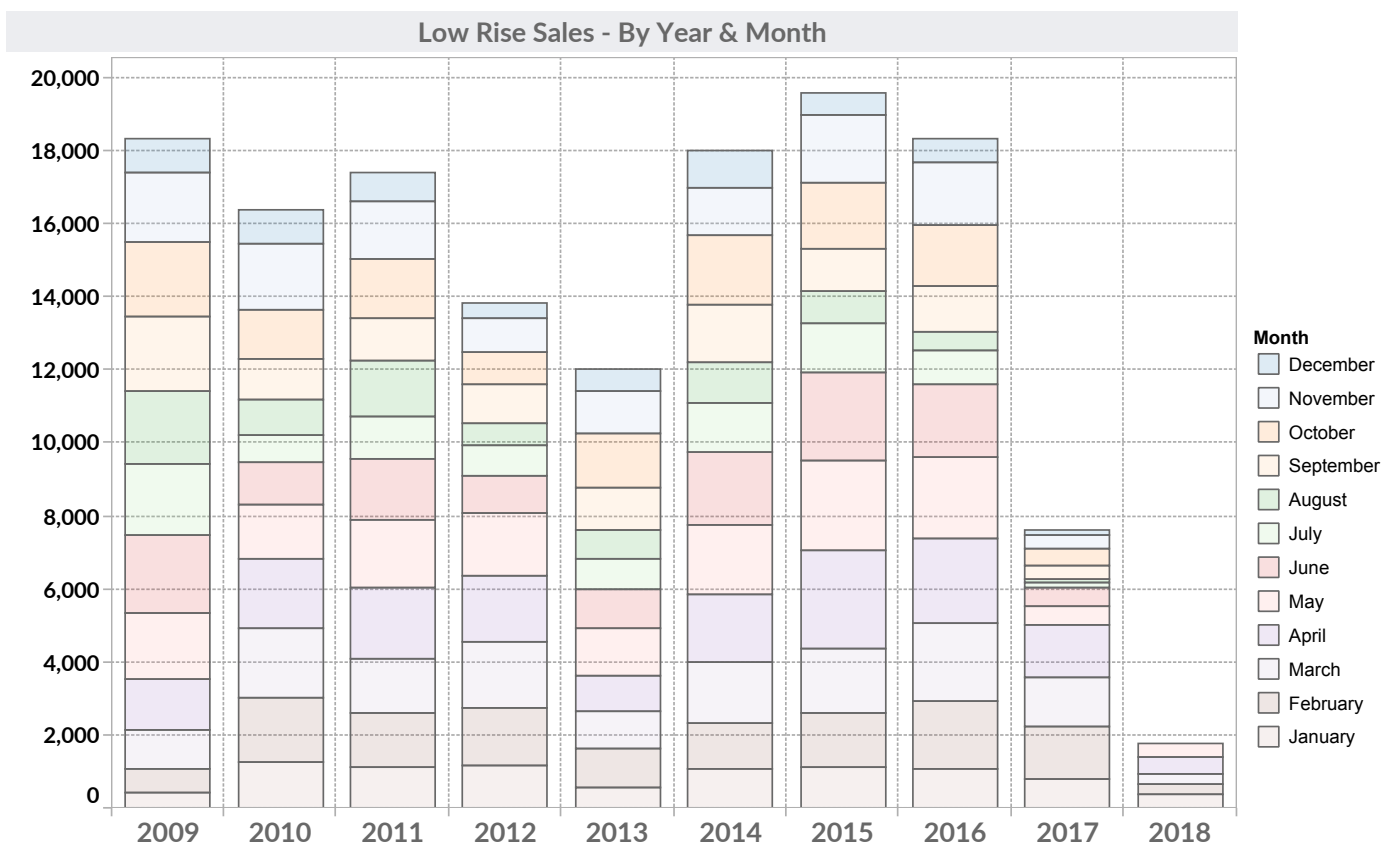
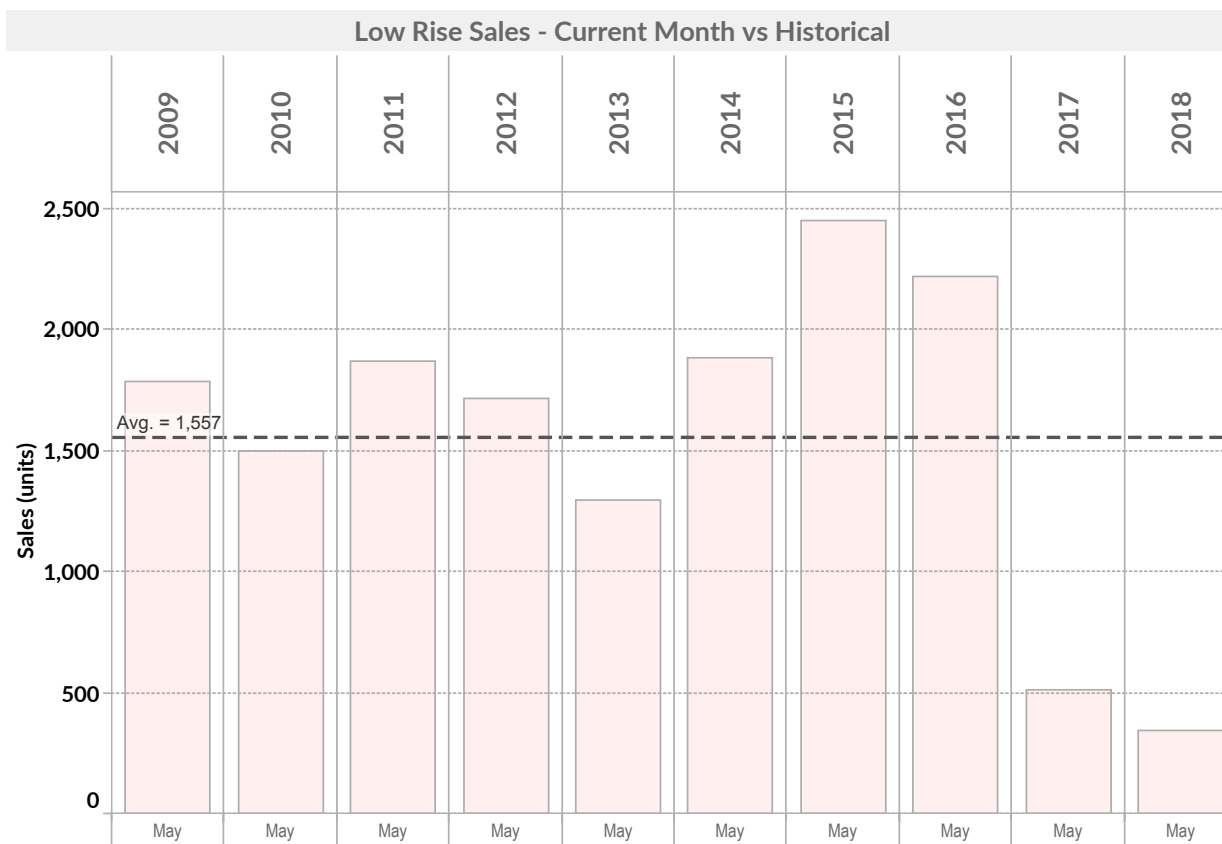
GTA - Monthly New Home Remaining Inventory



GTA - Monthly High Rise Rem. Inv. by Construction Status

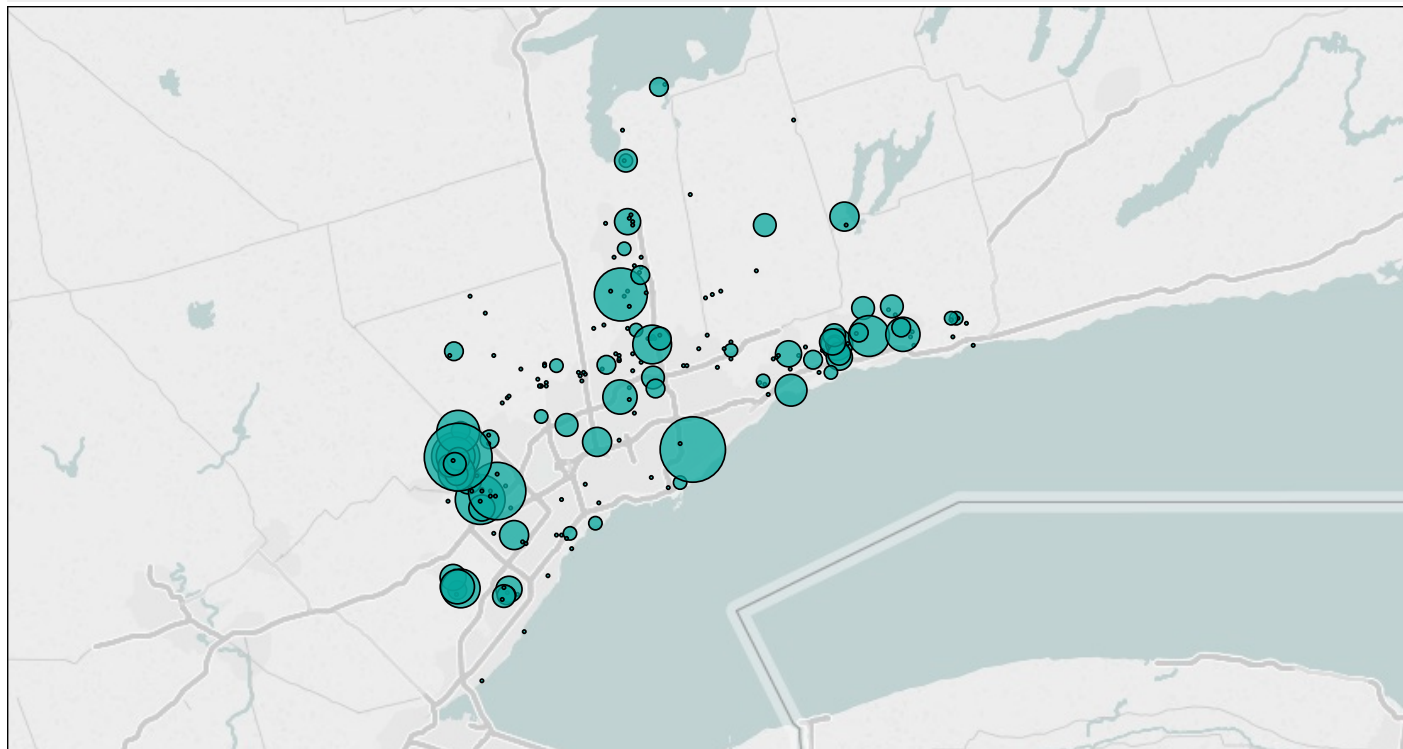


Historical Sales Comparison

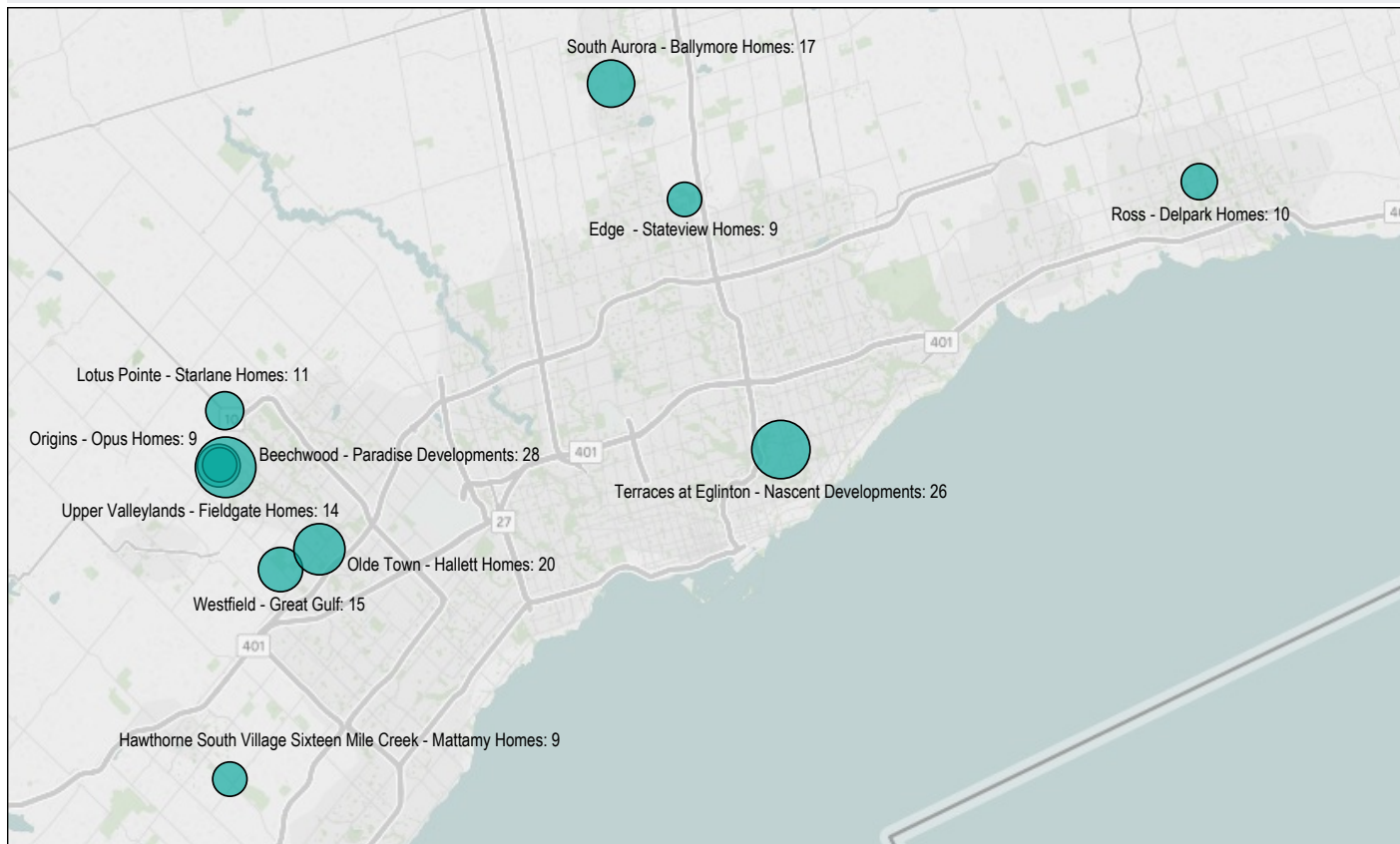


Current Sites

GTA - Active Low Rise Sites by Current Month Sales



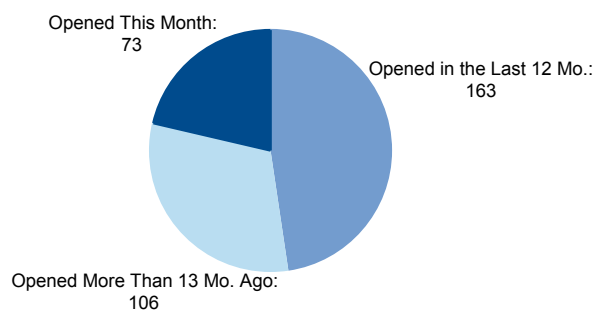
GTA - Top Sites by Current Month Sales



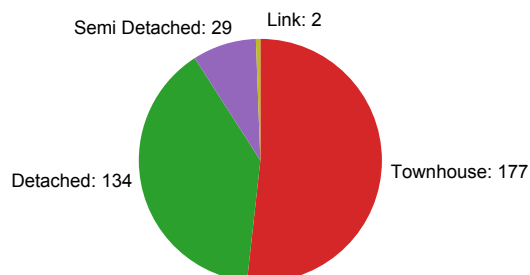
Monthly Sales Breakdown

Current Month Low Rise Sales Breakdown

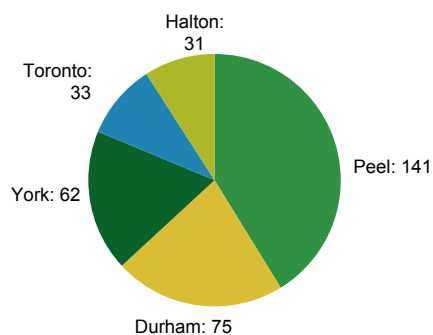
Sales by Opening Date



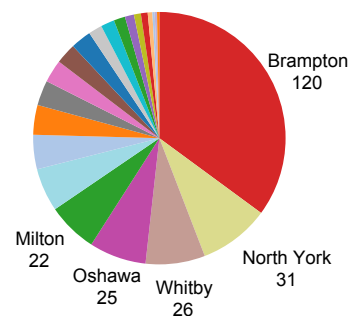
Sales by Product Type



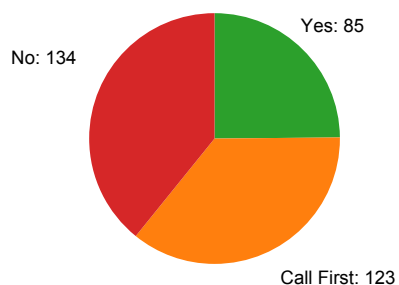
Sales by Region



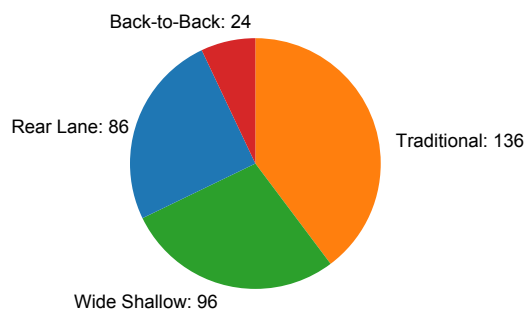
Sales by Municipality/Area



Sales by Sites with Broker Cooperation



Sales by Lot Type



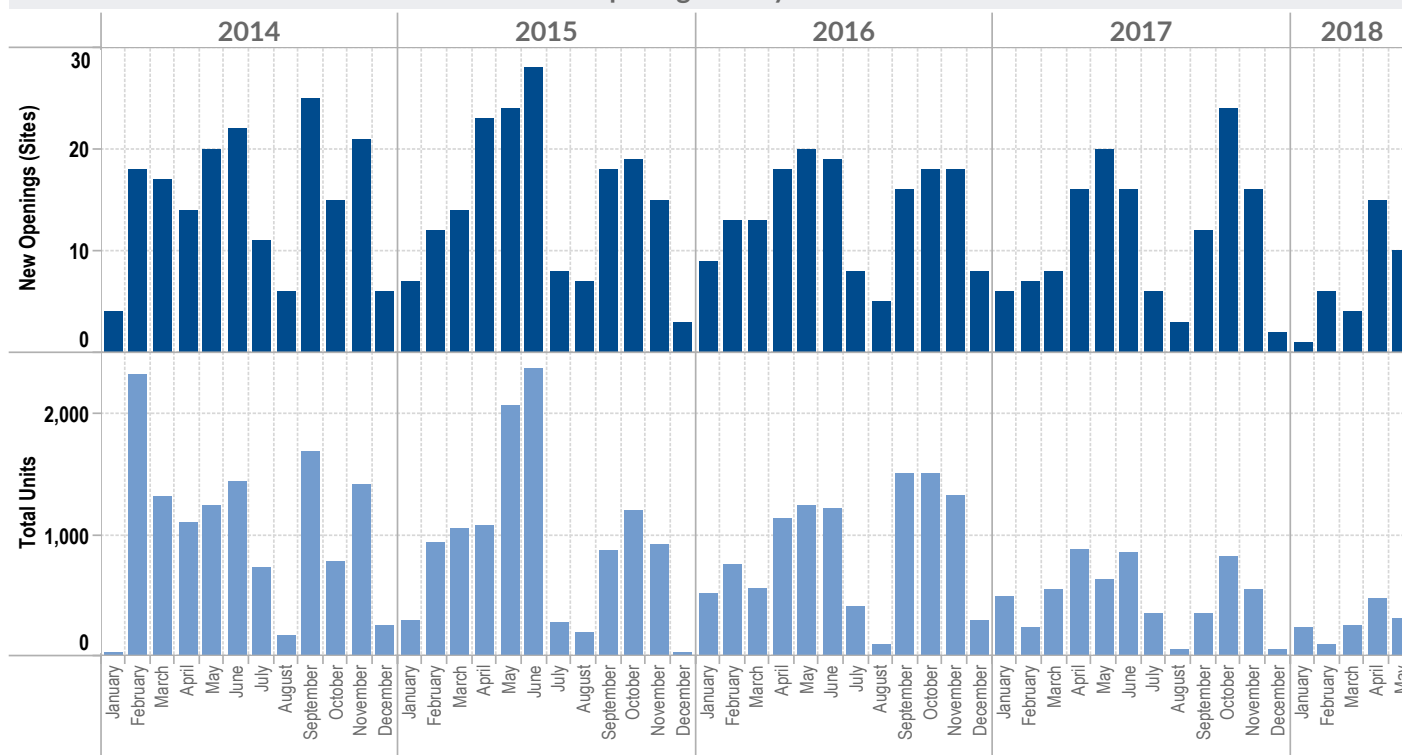
New Openings

May 2018 - Low Rise Openings - New Projects & Product Offerings

Site Name	Tenure	Municipality	opening date	No# of Units	Current Month Sales	Rem Inv	Avg. \$/SF
Terraces at Eglinton - Nascent Developments	Freehold	North York	5/1/2018	35	26	9	\$889
Amber Woods - Stanford Homes	Freehold	Brampton	5/12/2018	12	3	9	\$339
Beechwood - Paradise Developments	Freehold	Brampton	5/12/2018	14	12	2	\$417
Ross - Delpark Homes	Freehold Common Element	Oshawa	5/12/2018	54	10	44	\$282
Promenade - Wycliffe Homes	Freehold Common Element	Vaughan	5/24/2018	82	0	82	\$489
Encore Brampton - Gold Park Homes	Freehold	Brampton	5/26/2018	1	0	1	\$434
Estates of DuBerry - Front Door Developments	Freehold	Pickering	5/26/2018	40	0	40	\$379
Hill Top - Your Home Developments	Freehold	Ajax	5/26/2018	9	2	7	\$378
	Freehold Common Element	Ajax	5/26/2018	29	0	29	\$422
Olde Town - Hallett Homes	Freehold	Brampton	5/26/2018	26	20	6	\$345
Upper West Side - Regal Crest Homes	Freehold	Vaughan	5/26/2018	4	0	4	\$381
Grand Total				306	73	233	\$421

Condominium project openings within 10 days of month end are not able to record firm sales until the following month due to rescission period.

Low Rise Opening History - Sites & Lots



Top Builders - YTD

GTA - Top Low Rise Builders by YTD Sales

Builder	2018												Total	Market Share		Cum. Mkt. Share	
	January	February	March	April	May	June	July	August	September	October	November	December		%		%	
Mattamy Homes	257	122	68	51	17								515	29.4%		29.4%	
Great Gulf	24	22	26	34	26								132	7.5%		37.0%	
Paradise Developments	2	0	41	10	37								90	5.1%		42.1%	
Treasure Hill	9	6	3	48	7								73	4.2%		46.3%	
Fieldgate Homes	1	1	34	14	16								66	3.8%		50.1%	
Country Homes	23	14	9	12	2								60	3.4%		53.5%	
Starlane Homes			0	47	11								58	3.3%		56.8%	
Conservatory Group	4	6	8	7	13								38	2.2%		59.0%	
Tribute Communities	1	1	18	8	7								35	2.0%		61.0%	
Poetry Living				30	3								33	1.9%		62.9%	
Minto Developments	9	8	7	5	2								31	1.8%		64.6%	
Opus Homes	3	2	1	15	10								31	1.8%		66.4%	
Nascent Developments					26								26	1.5%		67.9%	
Deco Homes	2	3	2	15	1								23	1.3%		69.2%	
LIV Communities	1	3	9	5	3								21	1.2%		70.4%	
Hallett Homes					20								20	1.1%		71.5%	
Mosaik Homes	0	1	10	8	0								19	1.1%		72.6%	
Delpark Homes	0	0	2	2	14								18	1.0%		73.7%	
Digreen Homes	0	0	0	16	2								18	1.0%		74.7%	
Sierra Building Group	3	1	1	10	3								18	1.0%		75.7%	
Ballymore Homes	0	0	0	0	17								17	1.0%		76.7%	
CountryWide Homes	0	1	5	4	7								17	1.0%		77.7%	
	378	254	303	473	342								1,750				

Top Builders - Last 12 Months

GTA - Top Low Rise Builders by Last 12 Months' Sales

Builder	2017							2018					Total	Market Share		Cum. Mkt. Share	
	June	July	August	September	October	November	December	January	February	March	April	May		%		%	
Mattamy Homes	1	32	67	149	58	59	36	257	122	68	51	17	917	23.9%		23.9%	
Great Gulf	6	3	2	12	53	9	6	24	22	26	34	26	223	5.8%		29.8%	
Fieldgate Homes	56	0	0	13	67	10	1	1	1	34	14	16	213	5.6%		35.3%	
Paradise Developments	1	0	0	20	59	3	1	2	0	41	10	37	174	4.5%		39.9%	
Country Homes						44	23	23	14	9	12	2	127	3.3%		43.2%	
Treasure Hill	0	0	0	4	37	3	0	9	6	3	48	7	117	3.1%		46.3%	
Minto Developments	0	6	5	15	14	22	18	9	8	7	5	2	111	2.9%		49.2%	
Opus Homes	45	0	0	0	20	11	0	3	2	1	15	10	107	2.8%		51.9%	
Conservatory Group	8	7	9	10	13	14	2	4	6	8	7	13	101	2.6%		54.6%	
Arista Homes	52	0	0	0	22	6	0	1	0	0	10	1	92	2.4%		57.0%	
Deco Homes	46	0	0	0	13	7	0	2	3	2	15	1	89	2.3%		59.3%	
Aspen Ridge Homes	47	0	0	21	4	0	0	0	1	0	4	3	80	2.1%		61.4%	
TowerHill Homes	50			16	1	1	0	0	0	2	0	0	70	1.8%		63.2%	
Brookfield Residential	45	0	0	13	6	2	0	0	0	0	1	0	67	1.7%		65.0%	
Poetry Living	4	0	1	2	4	7	12				30	3	63	1.6%		66.6%	
Starlane Homes	0	0								0	47	11	58	1.5%		68.1%	
Pemberton Group	0	0	1	28	9	7	0	5	2	1	3	0	56	1.5%		69.6%	
Tribute Communities	9	9	3	0	0	0	0	1	1	18	8	7	56	1.5%		71.1%	
IDR Developments Inc.					24	15	3	2	2	3	4	1	54	1.4%		72.5%	
Remington Homes	16	3	2	1	3	8	2	5	2	0	5	2	49	1.3%		73.8%	
i2 Developments Inc.	42	0	0	0	0	0	0	0	0	3	0	0	45	1.2%		74.9%	
Dunpar Homes	1	0	4	1	6	13	1	2	4	3	0	6	41	1.1%		76.0%	
	514	118	114	350	490	349	144	378	254	303	473	342	3,829				

Top Sites

GTA - Top Low Rise Sites by Current Month Sales

Site Name	Municipality	Product Type	Lot Size	2018 May
Beechwood - Paradise Developments	Brampton	Semi Detached	25'	12
		Townhouse	20'	10
			21'	6
		Total		28
Terraces at Eglinton - Nascent Developments	North York	Townhouse	14'	24
			16'	2
		Total		26
Olde Town - Hallett Homes	Brampton	Detached	30'	0
			38'	16
			45'	4
		Total		20
South Aurora - Ballymore Homes	Aurora	Detached	38'	17
		Total		17
Westfield - Great Gulf	Brampton	Detached	34'	8
			38'	4
		Semi Detached	24'	3
		Total		15
Upper Valleylands - Fieldgate Homes	Brampton	Detached	30'	2
			38'	1
			41'	0
		Semi Detached	25'	1
		Townhouse	20'	2
			21'	8
		Total		14
Lotus Pointe - Starlane Homes	Caledon	Detached	38'	9
			43'	2
		Total		11
Ross - Delpark Homes	Oshawa	Townhouse	18'	10
		Total		10
Edge - Stateview Homes	Richmond Hill	Townhouse	20'	9
		Total		9
Hawthorne South Village Sixteen Mile Creek - Mattamy Homes	Milton	Detached	30'	3
			36'	1
			43'	1
		Townhouse	20'	1
			21'	3
		Total		9
Origins - Opus Homes	Brampton	Detached	30'	0
		Semi Detached	25'	0
		Townhouse	20'	8
			21'	1
		Total		9

Yr. Over Yr. Sales Comparison

Current Month Sales & Same Month Last Year by Municipality

Region	Municipality	May 2018					May 2017				
		Detached	Link	Semi Detached	Townhouse	Total	Detached	Link	Semi Detached	Townhouse	Total
Durham	Ajax	1		0	2	3	7		3	8	18
	Brock	0				0					
	Clarington	2	0	0	0	2	23	0	0	5	28
	Oshawa	11		2	12	25	27		0	0	27
	Pickering	0			11	11				0	0
	Scugog	3	2			5	2				2
	Uxbridge	0			3	3	0				0
	Whitby	17		0	9	26	0	0		15	15
	Total	34	2	2	37	75	59	0	3	28	90
Halton	Burlington				0	0	2		0	4	6
	Halton Hills	0				0	2			3	5
	Milton	16		2	4	22	0		3	3	6
	Oakville	1			8	9	40			19	59
	Total	17		2	12	31	44		3	29	76
Peel	Brampton	42		23	55	120	34		7	28	69
	Caledon	15		0	0	15	104				104
	Mississauga	0		2	4	6	0		0	1	1
	Total	57		25	59	141	138		7	29	174
Toronto	Etobicoke	0			1	1				1	1
	North York	0			31	31	12			7	19
	Scarborough								0	1	1
	Toronto			0	1	1			0	0	0
	Total	0		0	33	33	12		0	9	21
York	Aurora	19			0	19	2			0	2
	East Gwillimbury	2		0	2	4	8		4	0	12
	Georgina	4			2	6				0	0
	King	0				0	1				1
	Markham	0			9	9	10			16	26
	Newmarket	0	0		1	1		0		0	0
	Richmond Hill	0		0	10	10	8			5	13
	Vaughan	1		0	12	13	13		4	59	76
	Whitchurch-Stouffville	0			0	0	0			22	22
	Total	26	0	0	36	62	42	0	8	102	152
Grand Total		134	2	29	177	342	295	0	21	197	513

Sales & Remaining Inventory

Last 12 Months' Sales & Remaining Inventory by Municipality

Last 12 Months - Sales							Remaining Inventory				
Region	Municipality	Detached	Link	Semi Detached	Townhouse	Total	Detached	Link	Semi Detached	Townhouse	Total
Durham	Ajax	24		4	5	33	73		21	64	158
	Brock	0				0	3				3
	Clarington	54	1	1	22	78	125	12	6	137	280
	Oshawa	45		2	35	82	126		24	86	236
	Pickering	162			94	256	147			118	265
	Scugog	10	4			14	25	19			44
	Uxbridge	0			9	9	9			46	55
	Whitby	296		14	235	545	268		16	61	345
	Total	591	5	21	400	1,017	776	31	67	512	1,386
Halton	Burlington	1			4	5				9	9
	Halton Hills	6			0	6	37				37
	Milton	305		69	181	555	76		58	62	196
	Oakville	28			251	279	82			59	141
	Total	340		69	436	845	195		58	130	383
Peel	Brampton	280		74	258	612	326		118	366	810
	Caledon	120		0	9	129	92		18	22	132
	Mississauga	3		7	46	56	5		37	73	115
	Total	403		81	313	797	423		173	461	1,057
Toronto	Etobicoke	16			16	32	20			16	36
	North York	7			40	47	1			63	64
	Scarborough	1		0	0	1					
	Toronto			1	61	62			1	5	6
	Total	24		1	117	142	21		1	84	106
York	Aurora	51			2	53	183			36	219
	East Gwillimbury	30		0	12	42	120		8	34	162
	Georgina	75			6	81	95			26	121
	King	4				4	13				13
	Markham	0			158	158	12			200	212
	Newmarket	0	0		9	9	11	5		5	21
	Richmond Hill	130		33	260	423	90		23	205	318
	Vaughan	156		3	77	236	190		11	269	470
	Whitchurch-Stouffville	14			8	22	34			3	37
	Total	460	0	36	532	1,028	748	5	42	778	1,573
Grand Total		1,818	5	208	1,798	3,829	2,163	36	341	1,965	4,505

Copyright © Altus Group Limited

Altus Group Limited, makes no representation about the accuracy, completeness, or the suitability of the material represented herein for the particular purposes of any reader and such material may not be copied, duplicated or re-distributed in any form or by any means without the prior written permission of Altus Group Limited. Altus Group Limited assumes no responsibility or liability without limitation for any errors or omissions in the information contained in the material represented. E&O.E.