



Greater Toronto Area Low Rise Projects

New Homes Monthly Market Report
Data as of September 2018

Altus Data Solutions Monthly Market Report - GTA New Homes Overview

Monthly Sales	Sep-18		Sep-17		Change
High Rise	1,494		1,878		-20.4%
Low Rise	253		351		-27.9%
Total	1,747		2,229		-21.6%
Year to Date Sales	Jan.-Sep. 2018		Jan.-Sep. 2017		Y/Y Change
High Rise	13,151		25,614		-48.7%
Low Rise	2,816		6,620		-57.5%
Total	15,967		32,234		-50.5%
Year to Date Supply	Jan.-Sep. 2018		Jan.-Sep. 2017		Y/Y Change
High Rise	14,766		25,100		-41.2%
Low Rise	4,272		7,587		-43.7%
Total	19,038		32,687		-41.8%
Year to Date Completions	Jan.-Sep. 2018		Jan.-Sep. 2017		Y/Y Change
High Rise	12,295		12,148		1.2%
Remaining Inventory	Sep-18	Aug-18	Sep-17	M/M Change	Y/Y Change
High Rise	8,820	8,721	9,678	1.1%	-8.9%
Low Rise	5,132	4,813	2,864	6.6%	79.2%
Total	13,952	13,534	12,542	3.1%	11.2%
Benchmark Price	Sep-18	Aug-18	Sep-17	M/M Change	Y/Y Change
High Rise	\$789,643	\$784,512	\$661,188	0.7%	19.4%
Low Rise	\$1,119,533	\$1,129,129	\$1,204,829	-0.8%	-7.1%
Projects	New Openings	All Active	Under Const.	Pre-Const.	
High Rise Projects	10	299	266	151	
High Rise Units	1,949	75,361	65,489	36,815	
% Sold*	31%	46%	95%	79%	
Low Rise Projects	7	243			
Low Rise Units	300	28,979			
% Sold*	14%	82%			

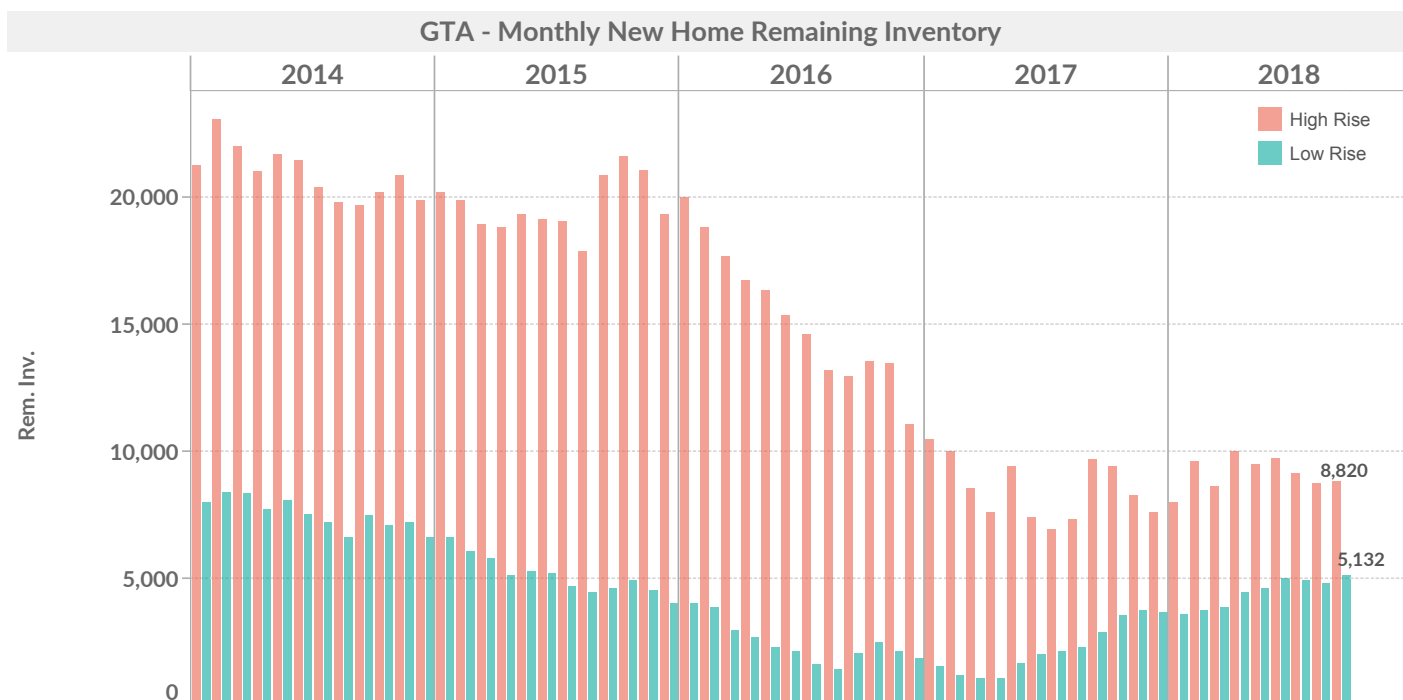
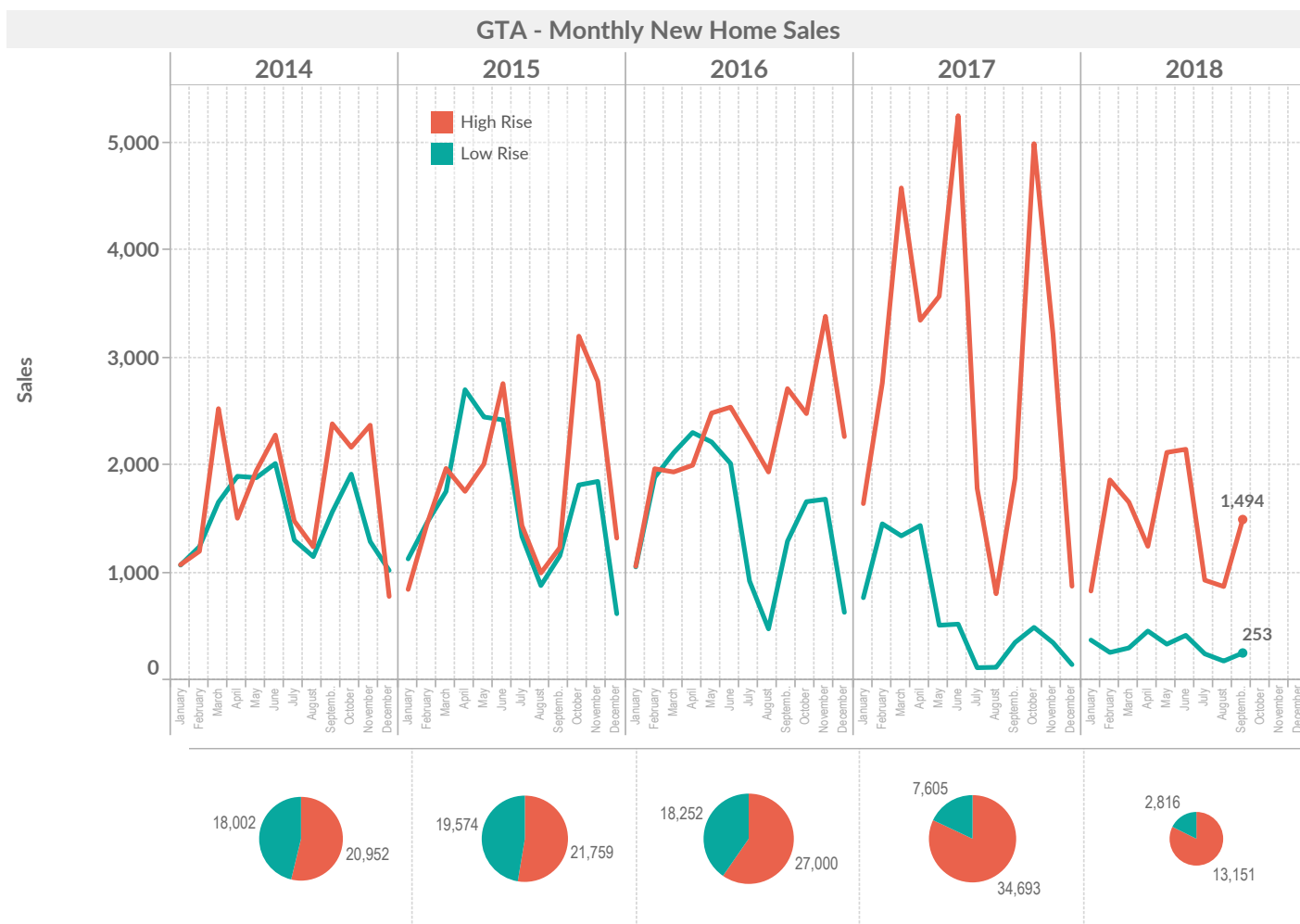
* Condominium projects opening within the last 10 days of the month cannot register firm sales. This calculation uses only those projects opening early enough to record firm sales.

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

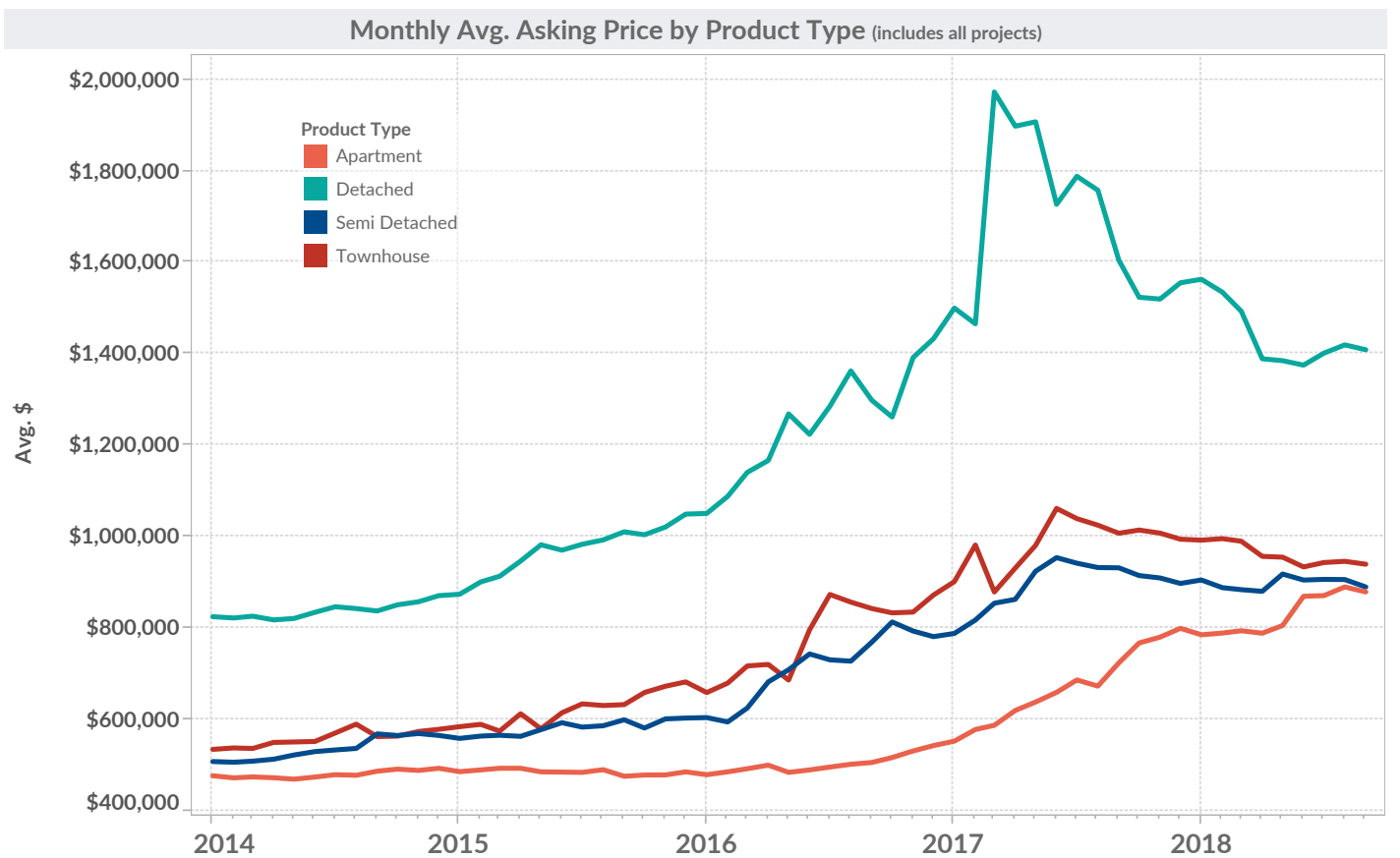
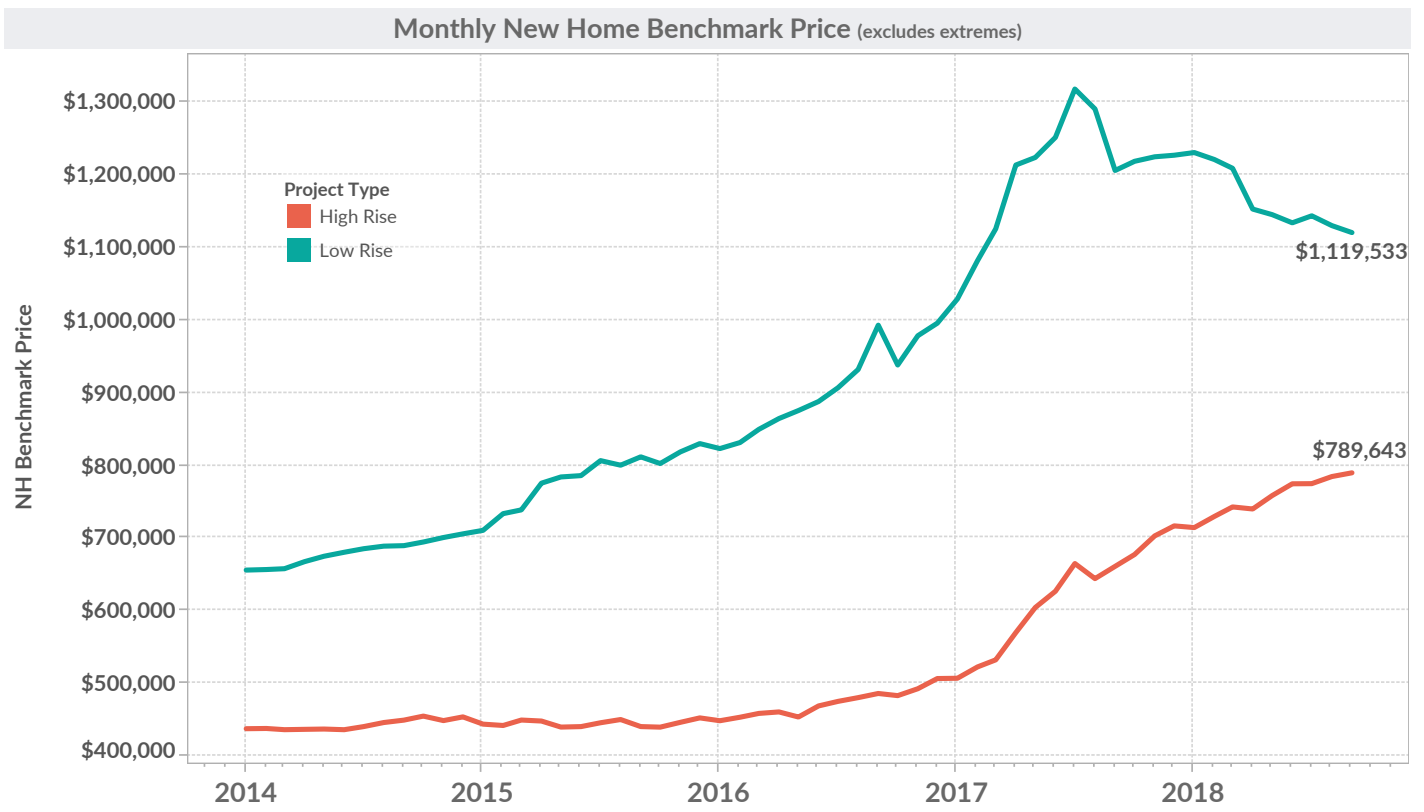
Under Construction includes all projects, regardless of whether sold out or not, that are currently under construction.

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

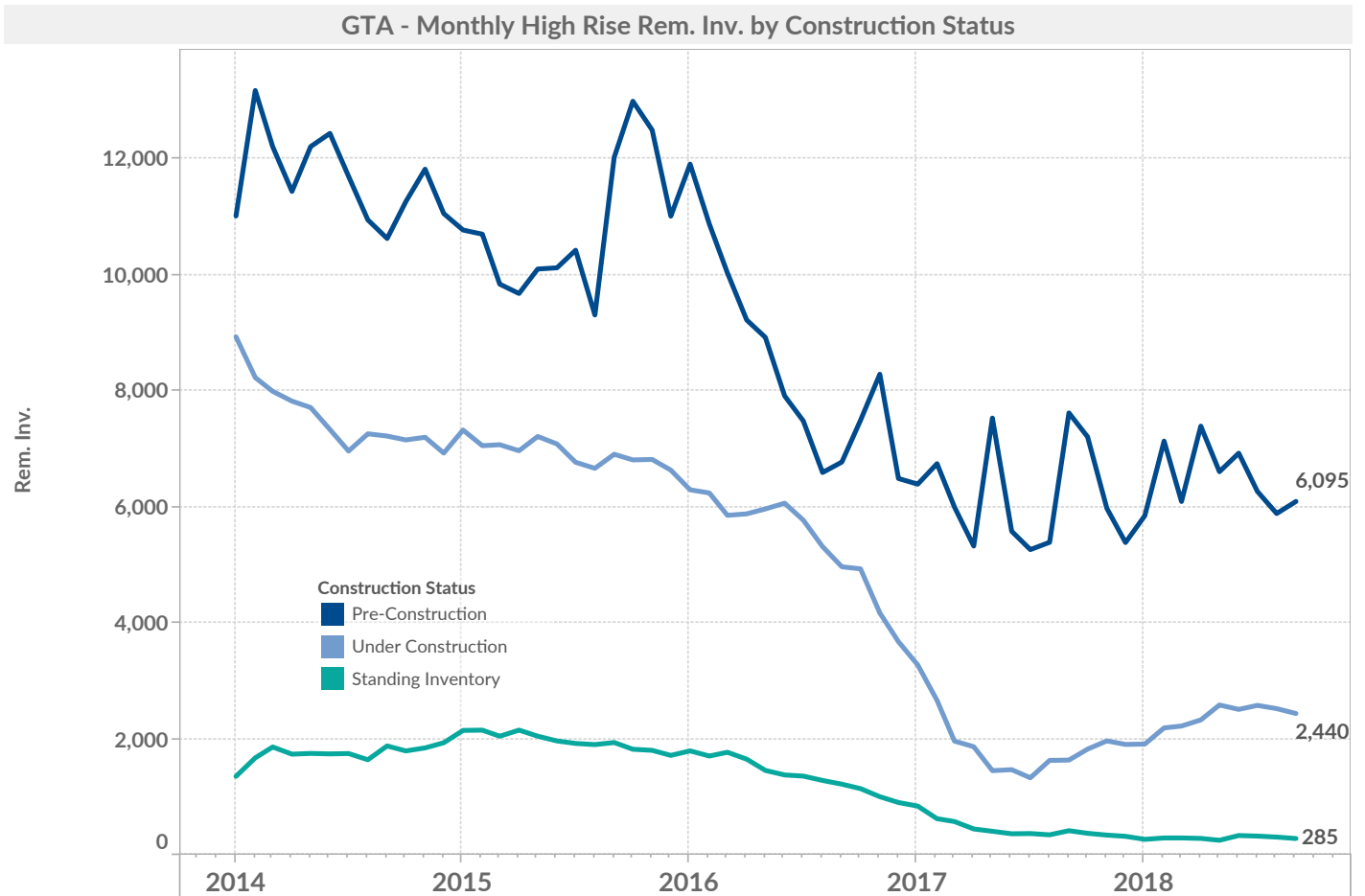
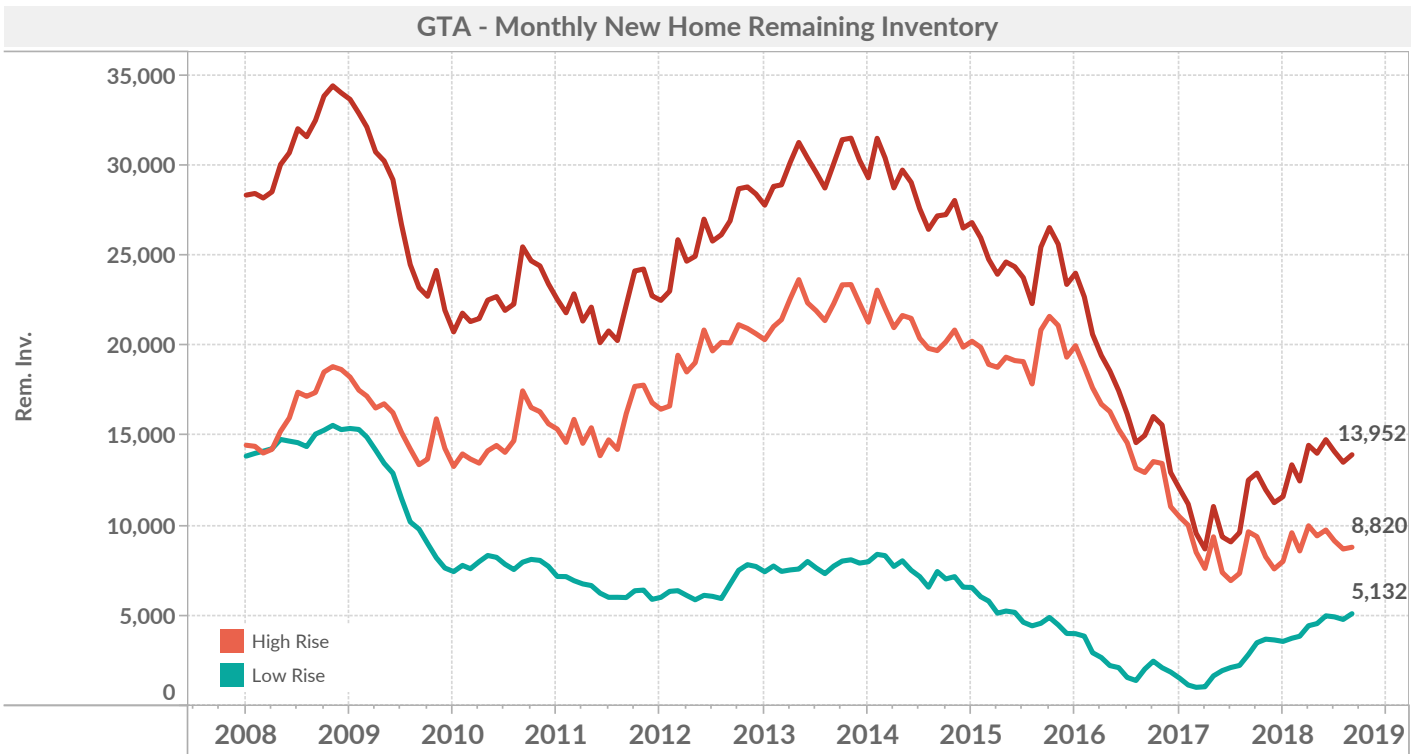
Sales & Remaining Inventory



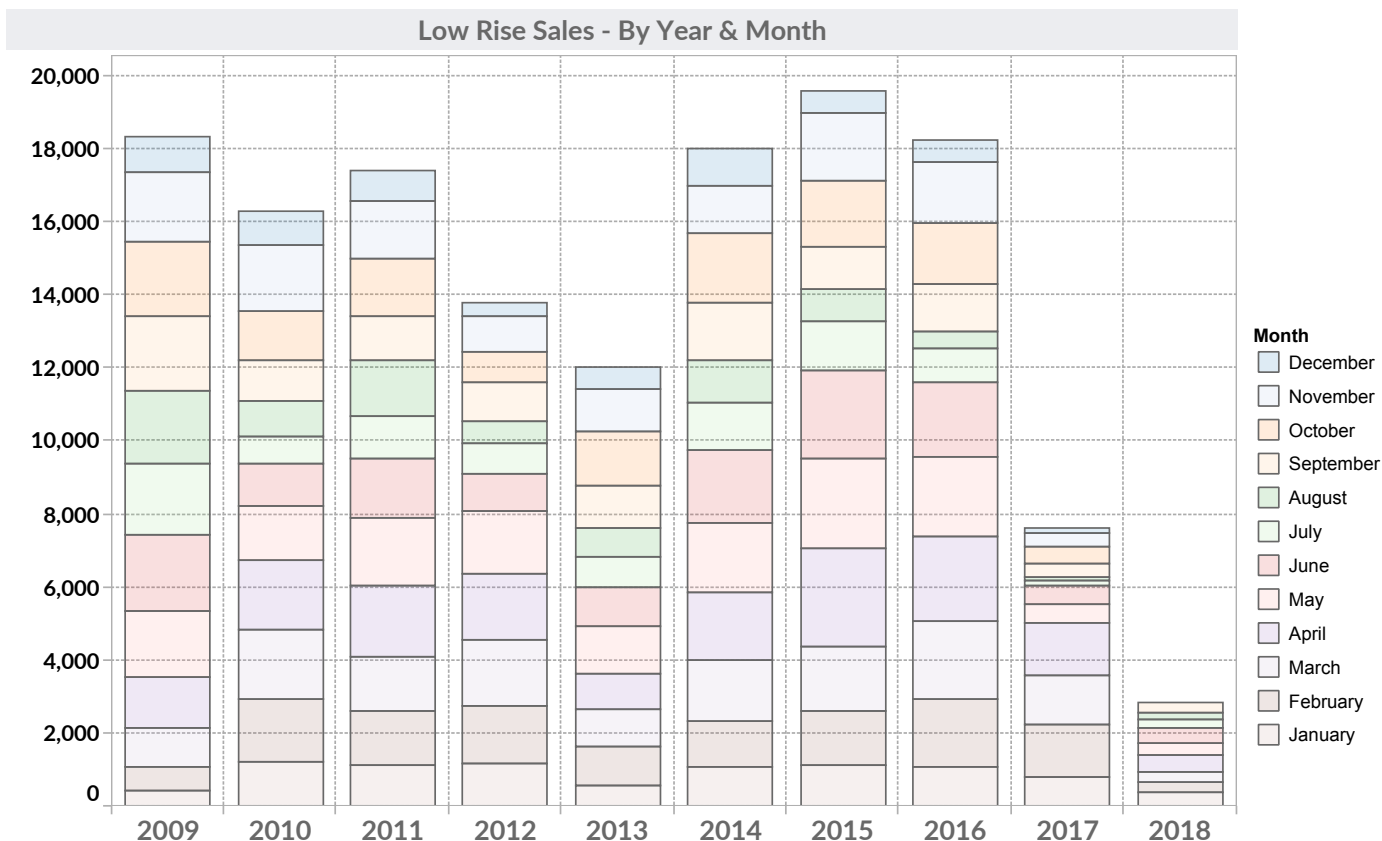
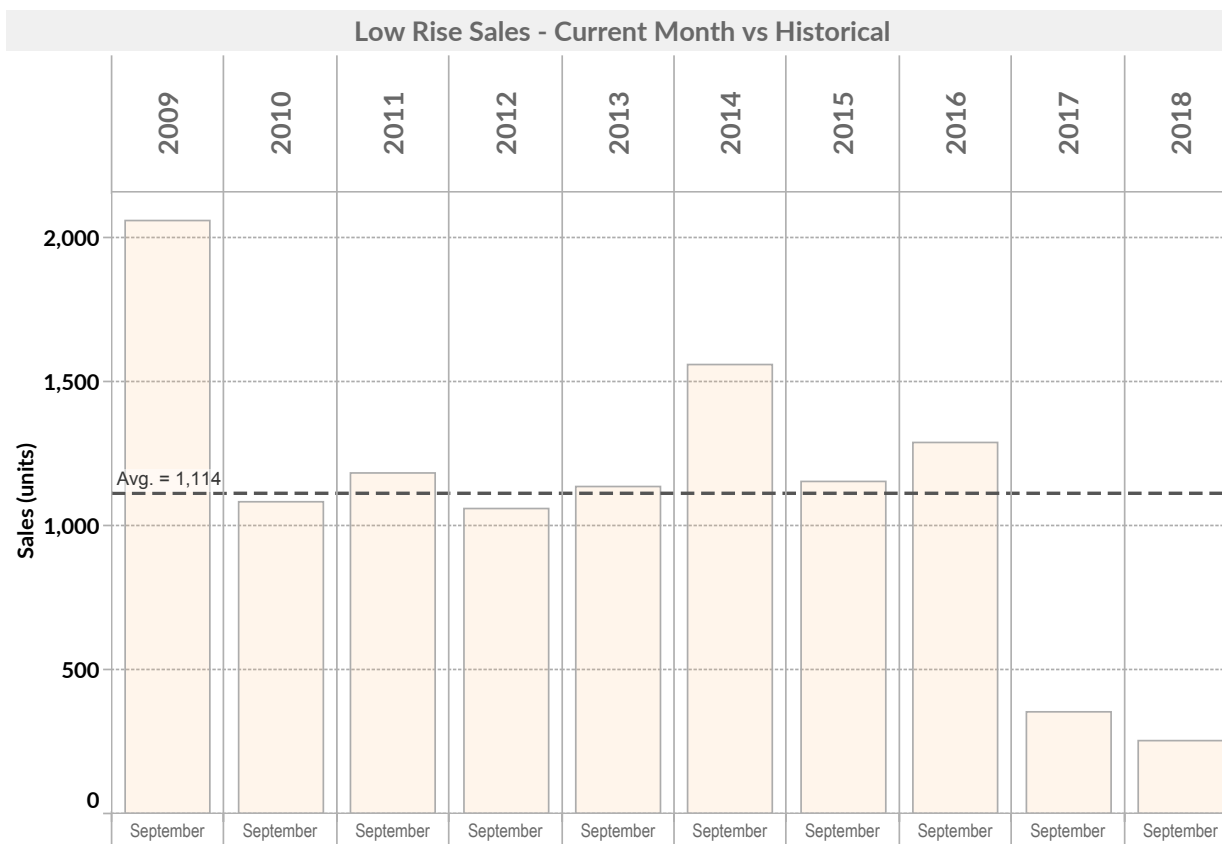
Pricing



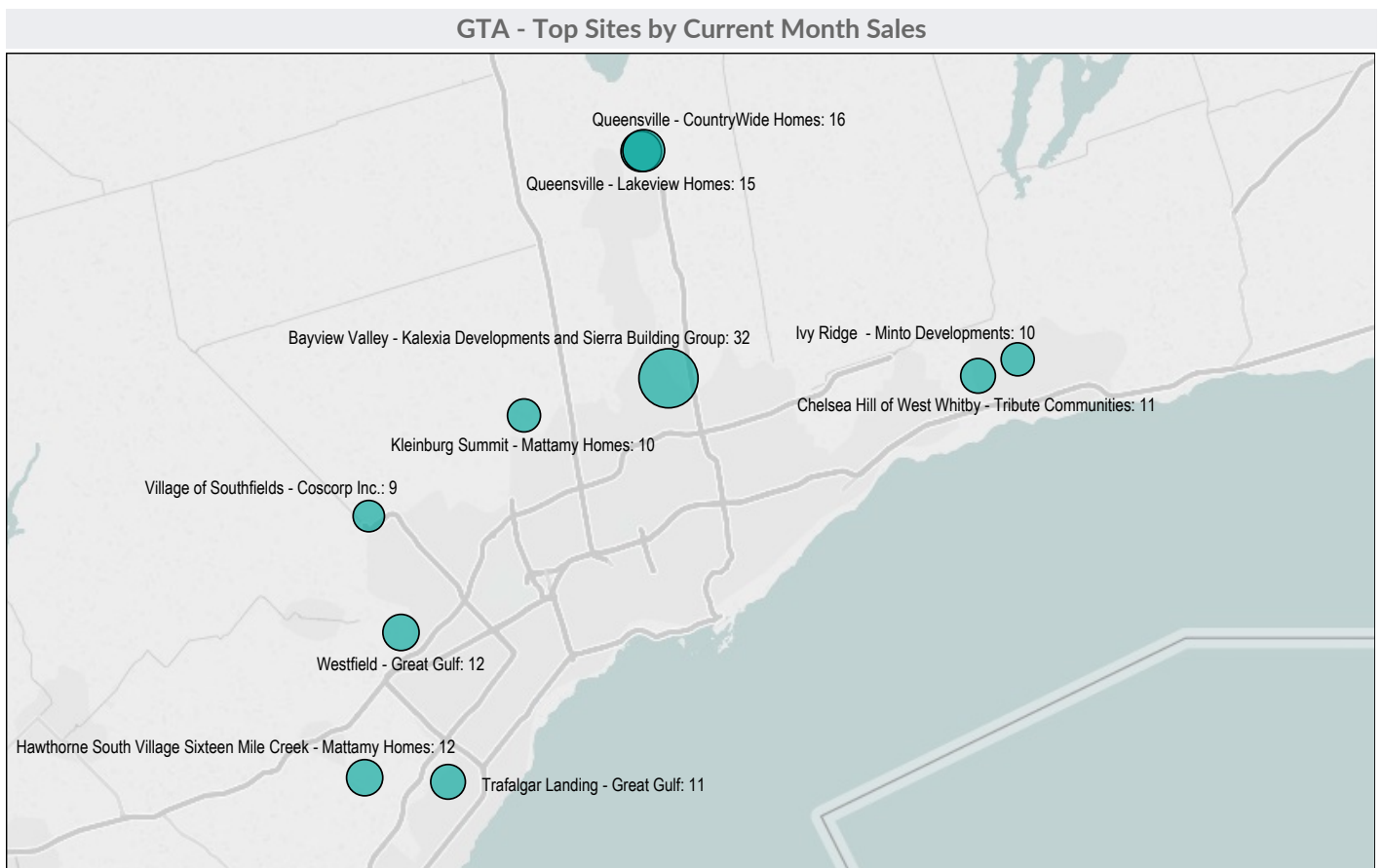
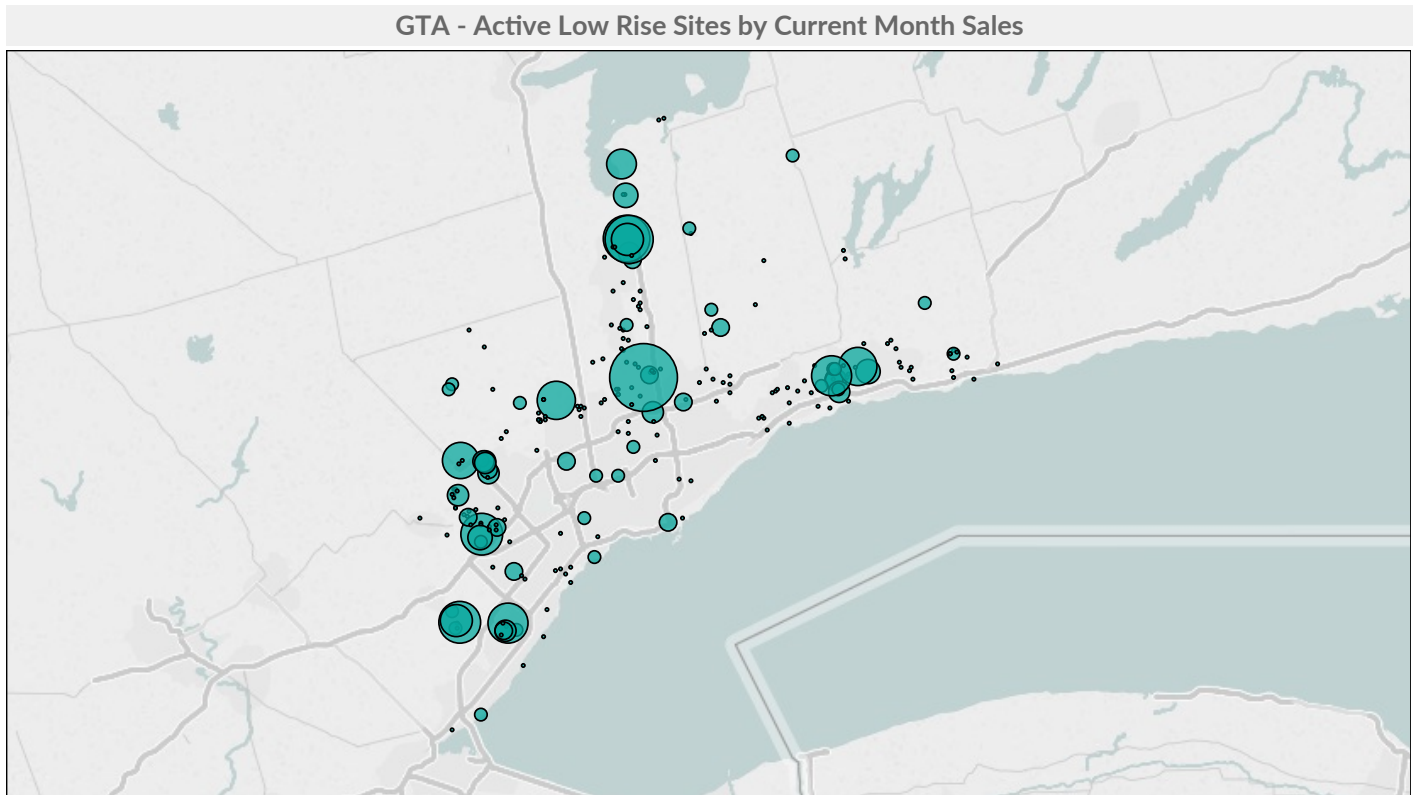
Remaining Inventory



Historical Sales Comparison



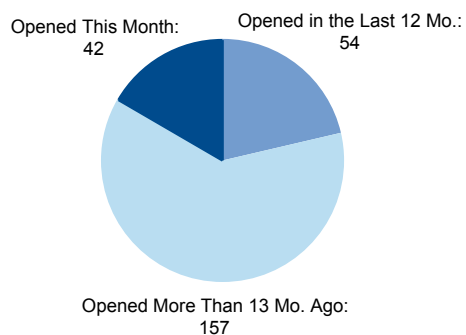
Current Sites



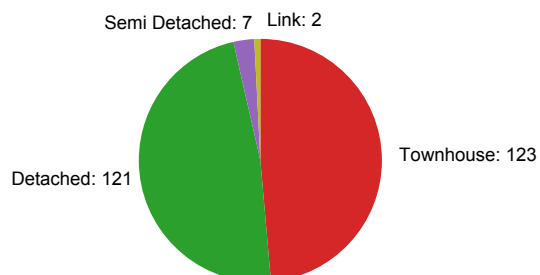
Monthly Sales Breakdown

Current Month Low Rise Sales Breakdown

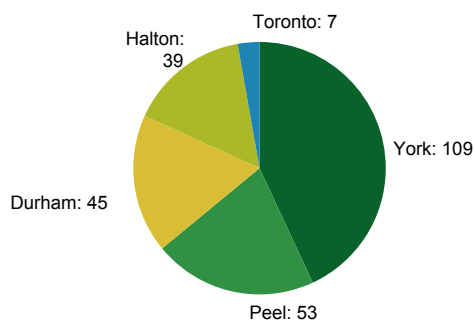
Sales by Opening Date



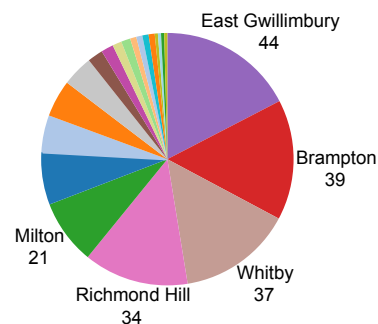
Sales by Product Type



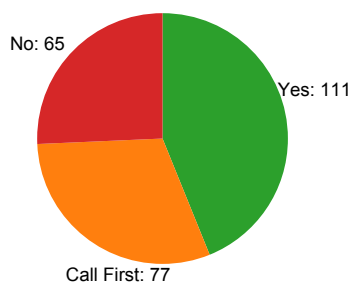
Sales by Region



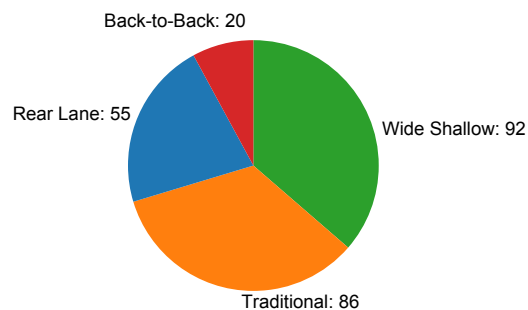
Sales by Municipality/Area



Sales by Sites with Broker Cooperation



Sales by Lot Type



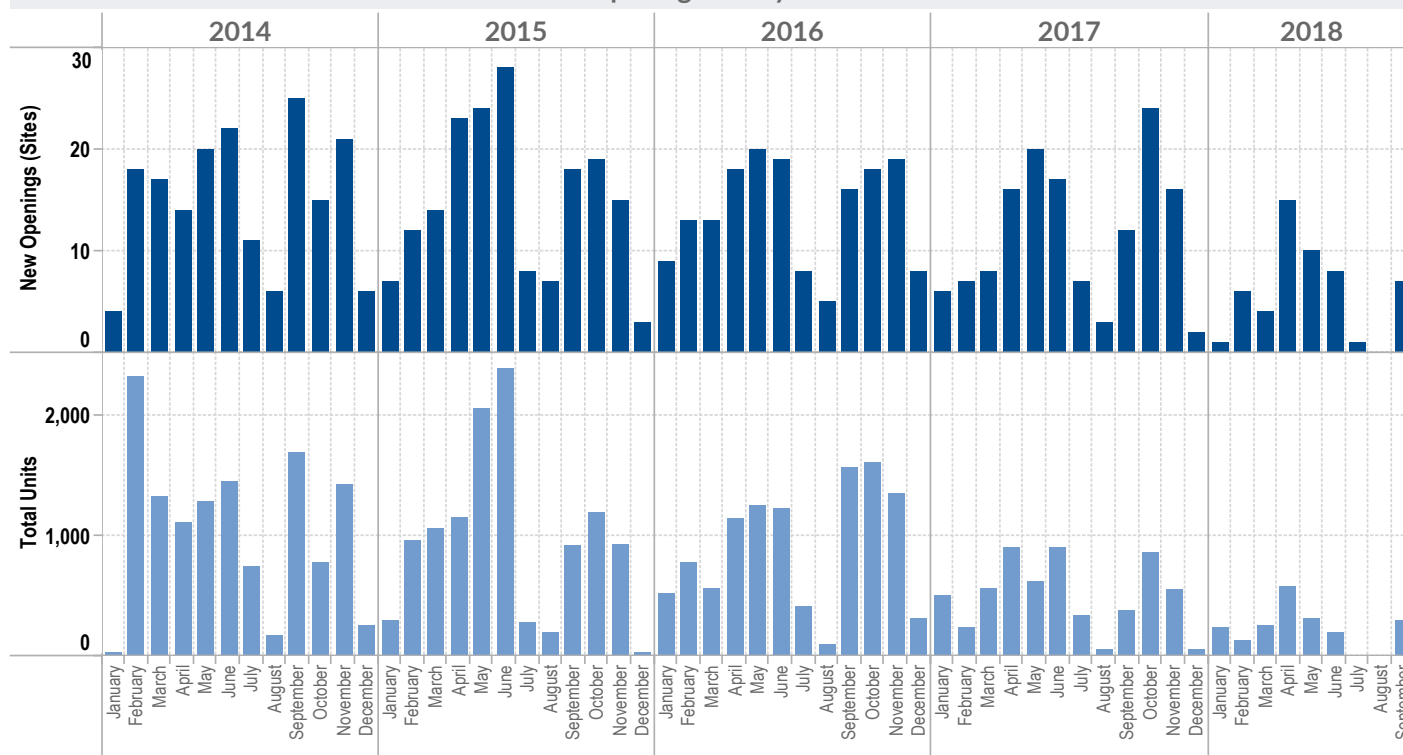
New Openings

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

Site Name	Tenure	Municipality	opening date	No# of Units	Current Month Sales	Rem Inv	Avg. \$/SF
Bayview Valley - Kalexia Developments and Sierra Building Group	Freehold Common Element	Richmond Hill	9/1/2018	41	32	9	\$560
Horizons - Chestnut Hill Developments	Freehold	Whitby	9/15/2018	23	0	23	\$351
Olde Town - Lakeview Homes	Freehold	Brampton	9/15/2018	27	2	25	\$378
Fifth Avenue Homes Richmond Hill - Fifth Avenue Homes	Freehold Common Element	Richmond Hill	9/16/2018	47	0	47	\$501
Chase - Eden Oak Homes	Freehold	Halton Hills	9/19/2018	31	0	31	\$412
Chelsea Hill of West Whitby - Tribute Communities	Freehold	Whitby	9/22/2018	41	8	33	\$361
Valleyview - WP Development Inc.	Freehold	Clarington	9/29/2018	90	0	90	
Grand Total				300	42	258	\$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	69	50	17	37	23	36	27				638	22.7%		22.7%	
Great Gulf	22	22	26	33	26	17	14	16	30				206	7.3%		30.0%	
Treasure Hill	9	6	3	48	5	22	21	12	6				132	4.7%		34.7%	
Minto Developments	9	8	7	5	2	50	13	7	11				112	4.0%		38.6%	
Paradise Developments	2	0	41	9	35	7	2	4	3				103	3.7%		42.3%	
Fieldgate Homes	1	1	34	12	16	11	4	8	3				90	3.2%		45.5%	
CountryWide Homes	0	2	4	4	8	26	15	4	20				83	2.9%		48.4%	
Conservatory Group	4	6	8	7	13	4	11	13	9				75	2.7%		51.1%	
Starlane Home Corporation			0	45	11	0	1	8	1				66	2.3%		53.4%	
Aspen Ridge Homes	0	1	0	3	2	26	12	7	14				65	2.3%		55.8%	
Country Homes	23	14	9	12	2	0	0	0	0				60	2.1%		57.9%	
Greenpark Group	0	0	0	0	0	32	13	3	6				54	1.9%		59.8%	
Regal Crest Homes	0	0	0	0	0	40	7	3	0				50	1.8%		61.6%	
Coscorp Inc.						21	14	5	9				49	1.7%		63.3%	
Tribute Communities	1	1	13	8	7	5	0	0	11				46	1.6%		65.0%	
Opus Homes	3	2	1	15	10	7	3	1	2				44	1.6%		66.5%	
Wycliffe Homes					0	31	6	0	0				37	1.3%		67.8%	
Lakeview Homes	0	9	5	0	2	0	0	1	17				34	1.2%		69.0%	
Poetry Living				30	3								33	1.2%		70.2%	
Kalexia Developments and Sierra Building Group									32				32	1.1%		71.3%	
LIV Communities	1	3	9	5	3	4	1	3	3				32	1.1%		72.5%	
GreenYork Homes	0	7	5	2	0	6	5	5					30	1.1%		73.5%	
	373	258	300	457	335	417	245	178	253				2,816				

Top Builders - Last 12 Months

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

	2017			2018												Total	Market Share		Cum. Mkt. Share	
Builder	October	November	December	January	February	March	April	May	June	July	August	September	%		%					
Mattamy Homes	58	59	36	257	122	69	50	17	37	23	36	27	791		20.8%		20.8%			
Great Gulf	51	9	6	22	22	26	33	26	17	14	16	30	272		7.2%		28.0%			
Treasure Hill	37	3	0	9	6	3	48	5	22	21	12	6	172		4.5%		32.5%			
Fieldgate Homes	67	10	1	1	1	34	12	16	11	4	8	3	168		4.4%		36.9%			
Minto Developments	14	22	18	9	8	7	5	2	50	13	7	11	166		4.4%		41.3%			
Paradise Developments	59	3	1	2	0	41	9	35	7	2	4	3	166		4.4%		45.6%			
Country Homes		44	23	23	14	9	12	2	0	0	0	0	127		3.3%		49.0%			
Conservatory Group	13	14	2	4	6	8	7	13	4	11	13	9	104		2.7%		51.7%			
CountryWide Homes	3	2	0	0	2	4	4	8	26	15	4	20	88		2.3%		54.0%			
Opus Homes	20	11	0	3	2	1	15	10	7	3	1	2	75		2.0%		56.0%			
Aspen Ridge Homes	4	0	0	0	1	0	3	2	26	12	7	14	69		1.8%		57.8%			
Starlane Home Corporation						0	45	11	0	1	8	1	66		1.7%		59.6%			
Regal Crest Homes		13	0	0	0	0	0	0	40	7	3	0	63		1.7%		61.2%			
Greenpark Group		3	0	0	0	0	0	0	32	13	3	6	57		1.5%		62.7%			
Lakeview Homes	20	2	0	0	9	5	0	2	0	0	1	17	56		1.5%		64.2%			
Poetry Living	4	7	12				30	3					56		1.5%		65.7%			
IDR Developments Inc.	24	15	3	2	2	3	4	1	1				55		1.4%		67.1%			
Coscorp Inc.									21	14	5	9	49		1.3%		68.4%			
Deco Homes	13	7	0	2	3	2	14	1	1	4	1	0	48		1.3%		69.7%			
Tribute Communities	0	0	0	1	1	13	8	7	5	0	0	11	46		1.2%		70.9%			
Dunpar Homes	6	12	1	2	4	3	0	4	3	0	6	4	45		1.2%		72.1%			
Arista Homes	22	6	0	1	0	0	10	1	0	1	0	2	43		1.1%		73.2%			
	491	349	145	373	258	300	457	335	417	245	178	253	3,801							

Top Sites

GTA - Top Low Rise Sites by Current Month Sales

Site Name	Municipality	Product Type	Lot Size	2018 September
Bayview Valley - Kalexia Developments and Sierra Building Group	Richmond Hill	Townhouse	21'	13
			23'	15
			25'	4
		Total		32
Queensville - CountryWide Homes	East Gwillimbury	Detached	36'	10
			45'	3
		Townhouse	25'	3
			Total	16
Queensville - Lakeview Homes	East Gwillimbury	Detached	36'	8
			45'	3
		Townhouse	25'	4
			Total	15
Hawthorne South Village Sixteen Mile Creek - Mattamy Homes	Milton	Townhouse	20'	5
			21'	7
			23'	0
			Total	12
Westfield - Great Gulf	Brampton	Detached	34'	6
			38'	6
		Semi Detached	24'	0
			Total	12
Chelsea Hill of West Whitby - Tribute Communities	Whitby	Detached	40'	3
		Semi Detached	23'	2
		Townhouse	24'	6
		Total		11
Trafalgar Landing - Great Gulf	Oakville	Townhouse	20'	11
		Total		11
Ivy Ridge - Minto Developments	Whitby	Detached	36'	1
			43'	0
		Townhouse	20'	9
			Total	10
Kleinburg Summit - Mattamy Homes	Vaughan	Detached	30'	1
			40'	2
			50'	1
			60'	0
		Townhouse	21'	6
			Total	10
Village of Southfields - Coscorp Inc.	Caledon	Detached	36'	7
		Townhouse	20'	2
		Total		9
Arbor Peaks - Great Gulf	Milton	Detached	31'	1
			36'	5
			45'	0
		Semi Detached	26'	1
			Total	7

Yr. Over Yr. Sales Comparison

Current Month Sales & Same Month Last Year by Municipality

Region	Municipality	September 2018					September 2017				
		Detached	Link	Semi Detached	Townhouse	Total	Detached	Link	Semi Detached	Townhouse	Total
Durham	Ajax	1		0	0	1	0		0	0	0
	Brock	1				1					
	Clarington	2	0	0	0	2	9	0	0	1	10
	Oshawa	0		0	4	4	2		0	0	2
	Pickering	0			0	0	43			8	51
	Scugog	0	0			0	1				1
	Uxbridge	0			0	0	0				0
	Whitby	20		2	15	37	13			14	27
	Total	24	0	2	19	45	68	0	0	23	91
Halton	Burlington				1	1	0			1	1
	Halton Hills	0				0	0				0
	Milton	7		2	12	21	2		0	37	39
	Oakville	1			16	17	2			92	94
	Total	8		2	29	39	4		0	130	134
Peel	Brampton	30	2	3	4	39	33		12	18	63
	Caledon	9		0	3	12	2				2
	Mississauga	0		0	2	2	0		0	0	0
	Total	39	2	3	9	53	35		12	18	65
Toronto	Etobicoke	1			1	2	2			1	3
	North York	1			2	3	0			4	4
	Scarborough						1		0	0	1
	Toronto			0	2	2				0	0
	Total	2		0	5	7	3		0	5	8
York	Aurora	1			0	1	0			0	0
	East Gwillimbury	31		0	13	44	0		1	1	2
	Georgina	9			1	10	1			0	1
	King	0				0	0				0
	Markham	0			5	5	0			2	2
	Newmarket	0	0		0	0		0		3	3
	Richmond Hill	0	0	0	34	34	0		0	26	26
	Vaughan	4	0	0	8	12	6		0	5	11
	Whitchurch-Stouffville	3			0	3	8				8
	Total	48	0	0	61	109	15	0	1	37	53
Grand Total		121	2	7	123	253	125	0	13	213	351

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	37		6	6	49	91		18	63	172
	Brock	1				1	2				2
	Clarington	47	1	0	26	74	217	12	6	142	377
	Oshawa	41		2	30	73	100		24	73	197
	Pickering	17			41	58	146			108	254
	Scugog	7	6			13	28	16			44
	Uxbridge	0			5	5	9			50	59
	Whitby	299		17	265	581	294		37	139	470
	Total	449	7	25	373	854	887	28	85	575	1,575
Halton	Burlington	0			6	6				16	16
	Halton Hills	6				6	68				68
	Milton	328		74	192	594	38		54	70	162
	Oakville	21			164	185	82			43	125
	Total	355		74	362	791	188		54	129	371
Peel	Brampton	434	5	89	235	763	426	7	148	378	959
	Caledon	122		0	49	171	138		18	39	195
	Mississauga	3		3	39	45	5		39	74	118
	Total	559	5	92	323	979	569	7	205	491	1,272
Toronto	Etobicoke	14			18	32	12			14	26
	North York	5			50	55	19			53	72
	Scarborough			0	0	0					
	Toronto			1	64	65			1	3	4
	Total	19		1	132	152	31		1	70	102
York	Aurora	57			2	59	131			37	168
	East Gwillimbury	78		2	36	116	156		76	77	309
	Georgina	146			6	152	117			37	154
	King	2				2	13				13
	Markham	0			144	144	12			251	263
	Newmarket	3	2		6	11	8	3		5	16
	Richmond Hill	23	0	4	198	225	103	10	23	246	382
	Vaughan	182	3	10	114	309	224	5	4	226	459
	Whitchurch-Stouffville	7			0	7	45			3	48
	Total	498	5	16	506	1,025	809	18	103	882	1,812
Grand Total		1,880	17	208	1,696	3,801	2,484	53	448	2,147	5,132

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