



Greater Toronto Area Low Rise Projects

New Homes Monthly Market Report
Data as of November 2018

Altus Data Solutions Monthly Market Report - GTA New Homes Overview

Monthly Sales	Nov-18		Nov-17		Change
High Rise	2,454		3,213		-23.6%
Low Rise	369		342		7.9%
Total	2,823		3,555		-20.6%
Year to Date Sales	Jan.-Nov. 2018		Jan.-Nov. 2017		Y/Y Change
High Rise	20,408		33,867		-39.7%
Low Rise	3,667		7,452		-50.8%
Total	24,075		41,319		-41.7%
Year to Date Supply	Jan.-Nov. 2018		Jan.-Nov. 2017		Y/Y Change
High Rise	26,019		32,352		-19.6%
Low Rise	5,507		9,300		-40.8%
Total	31,526		41,652		-24.3%
Year to Date Completions	Jan.-Nov. 2018		Jan.-Nov. 2017		Y/Y Change
High Rise	15,070		14,822		1.7%
Remaining Inventory	Nov-18	Oct-18	Nov-17	M/M Change	Y/Y Change
High Rise	11,254	11,356	8,315	-0.9%	35.3%
Low Rise	5,543	5,238	3,747	5.8%	47.9%
Total	16,797	16,594	12,062	1.2%	39.3%
Benchmark Price	Nov-18	Oct-18	Nov-17	M/M Change	Y/Y Change
High Rise	\$786,602	\$775,537	\$702,992	1.4%	11.9%
Low Rise	\$1,150,823	\$1,115,284	\$1,223,610	3.2%	-5.9%
Projects	New Openings	All Active	Under Const.	Pre-Const.	
High Rise Projects	12	330	262	182	
High Rise Units	2,891	85,769	66,054	45,585	
% Sold*	21%	82%	95%	74%	
Low Rise Projects	12	263			
Low Rise Units	340	30,466			
% Sold*	16%	82%			

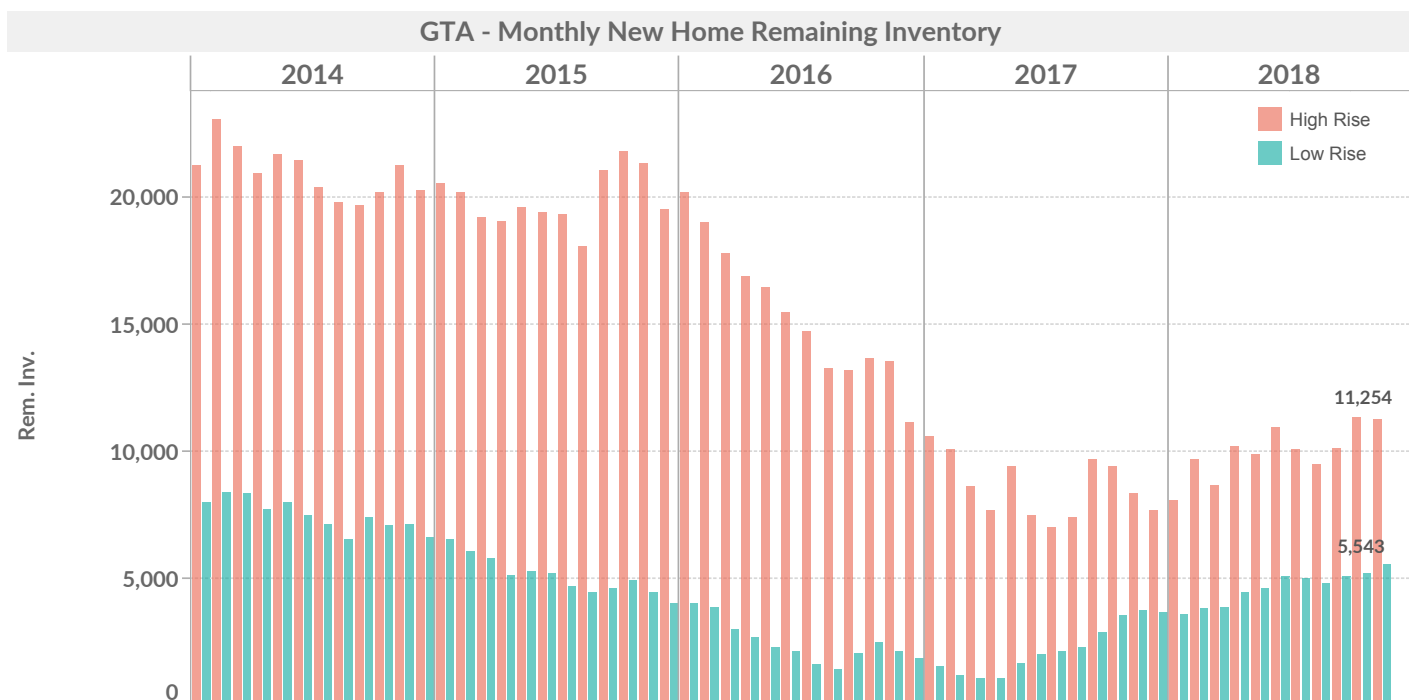
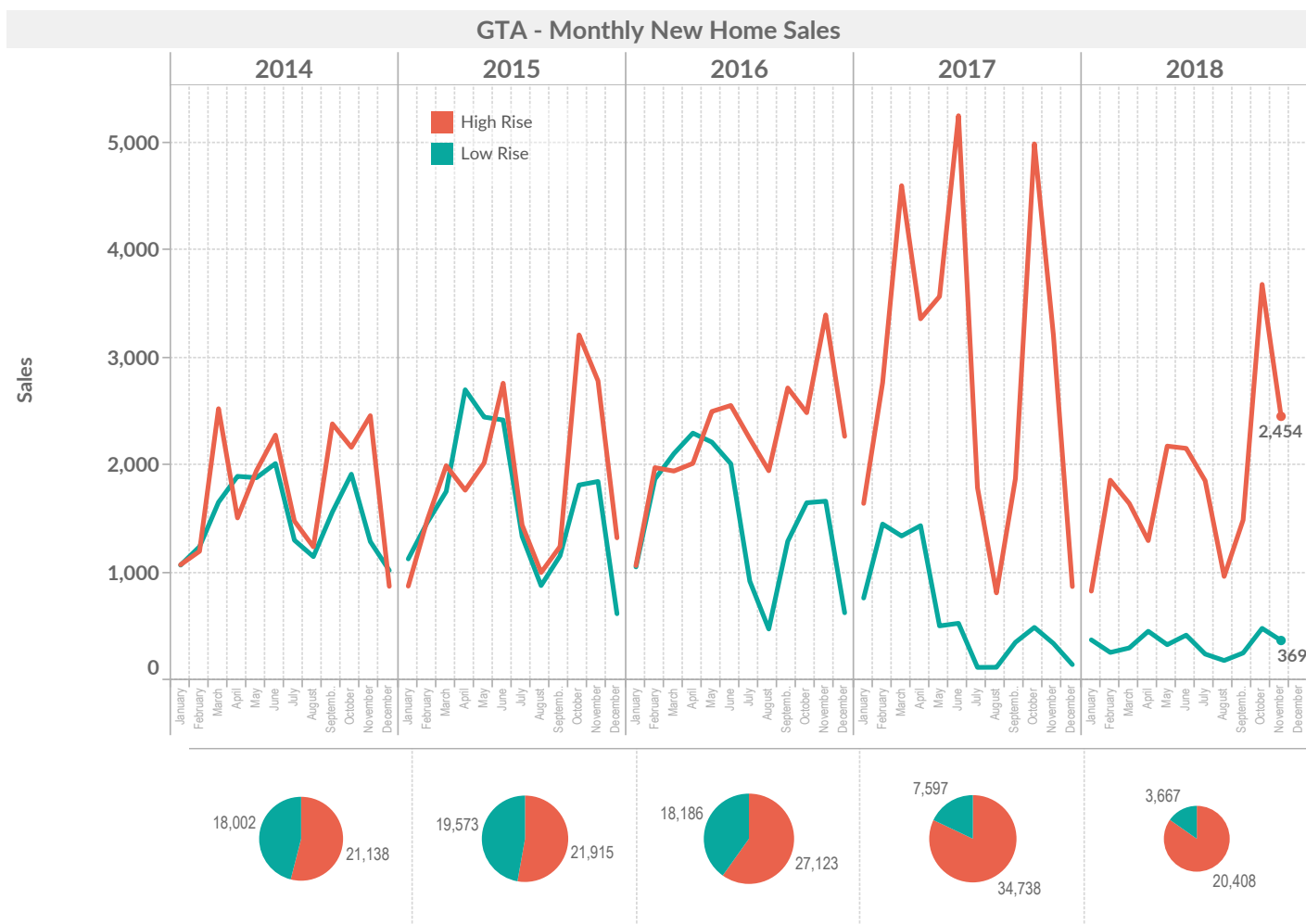
* Condominium projects opening within the last 10 days of the month cannot register firm sales. This calculation uses only those projects opening early enough to record firm sales.

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

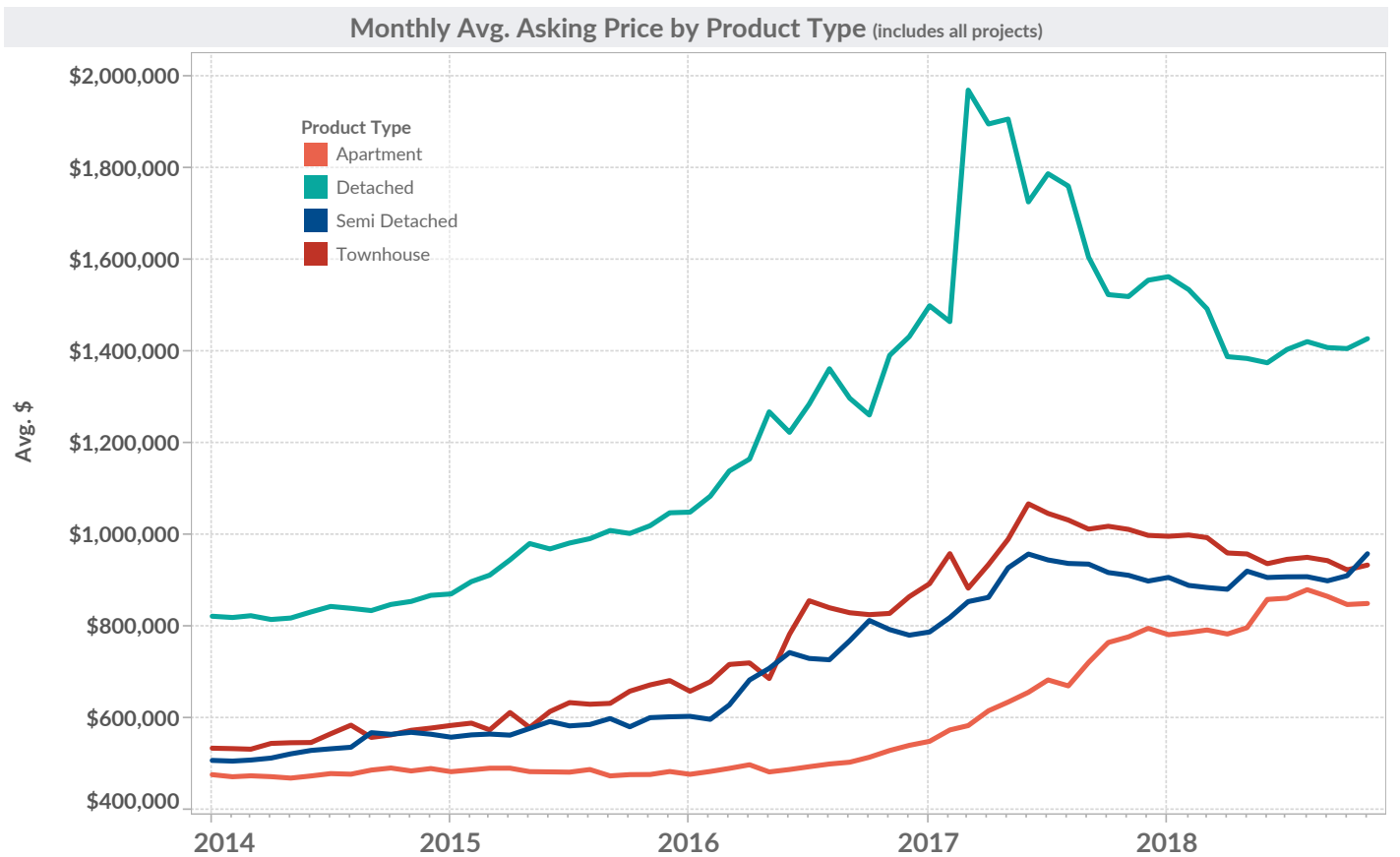
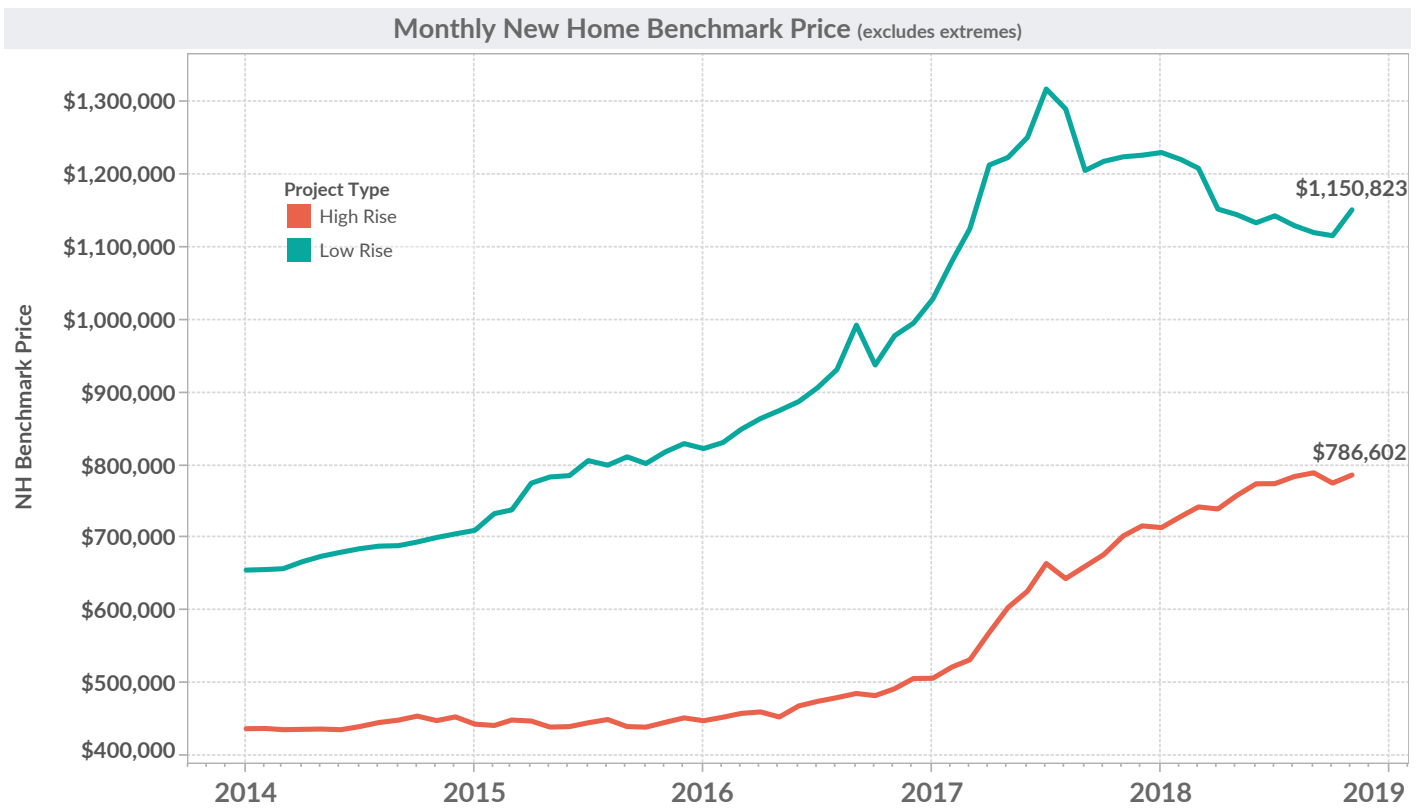
Under Construction includes all projects, regardless of whether sold out or not, that are currently under construction.

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

Sales & Remaining Inventory

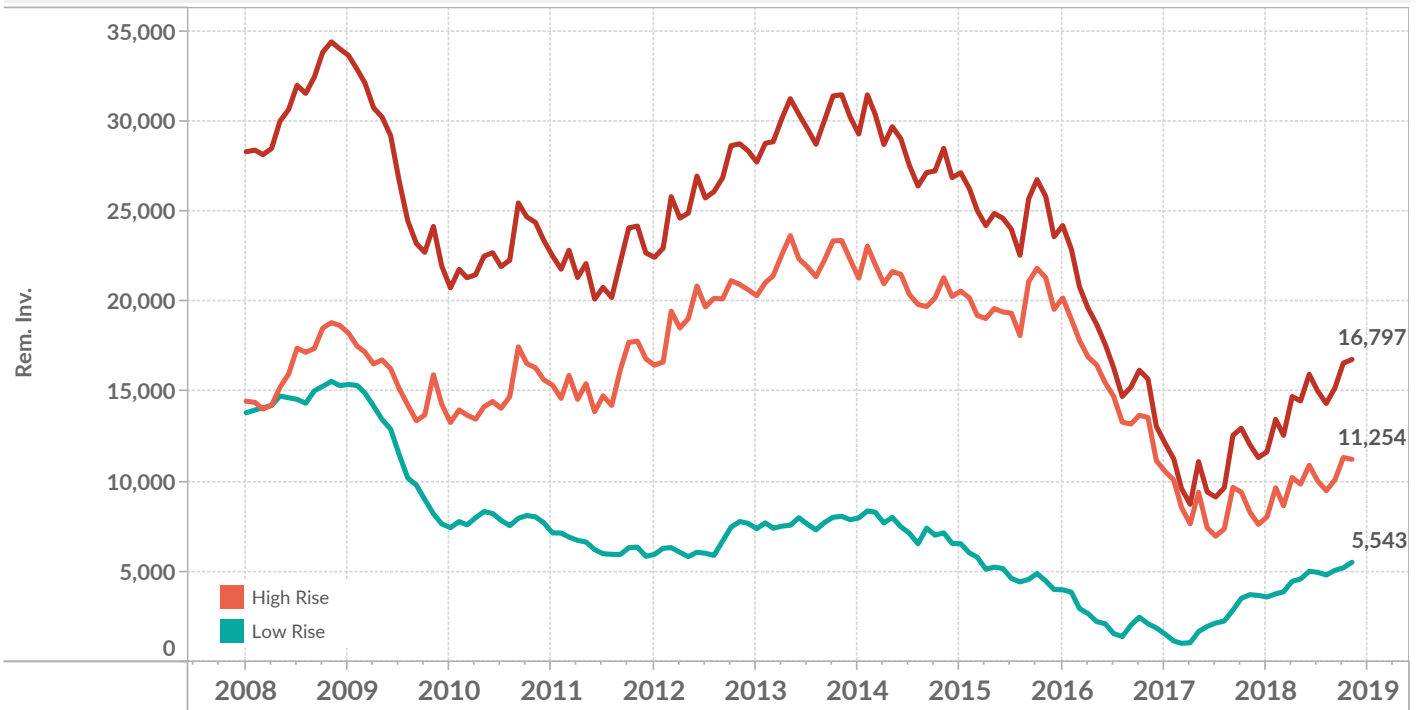


Pricing

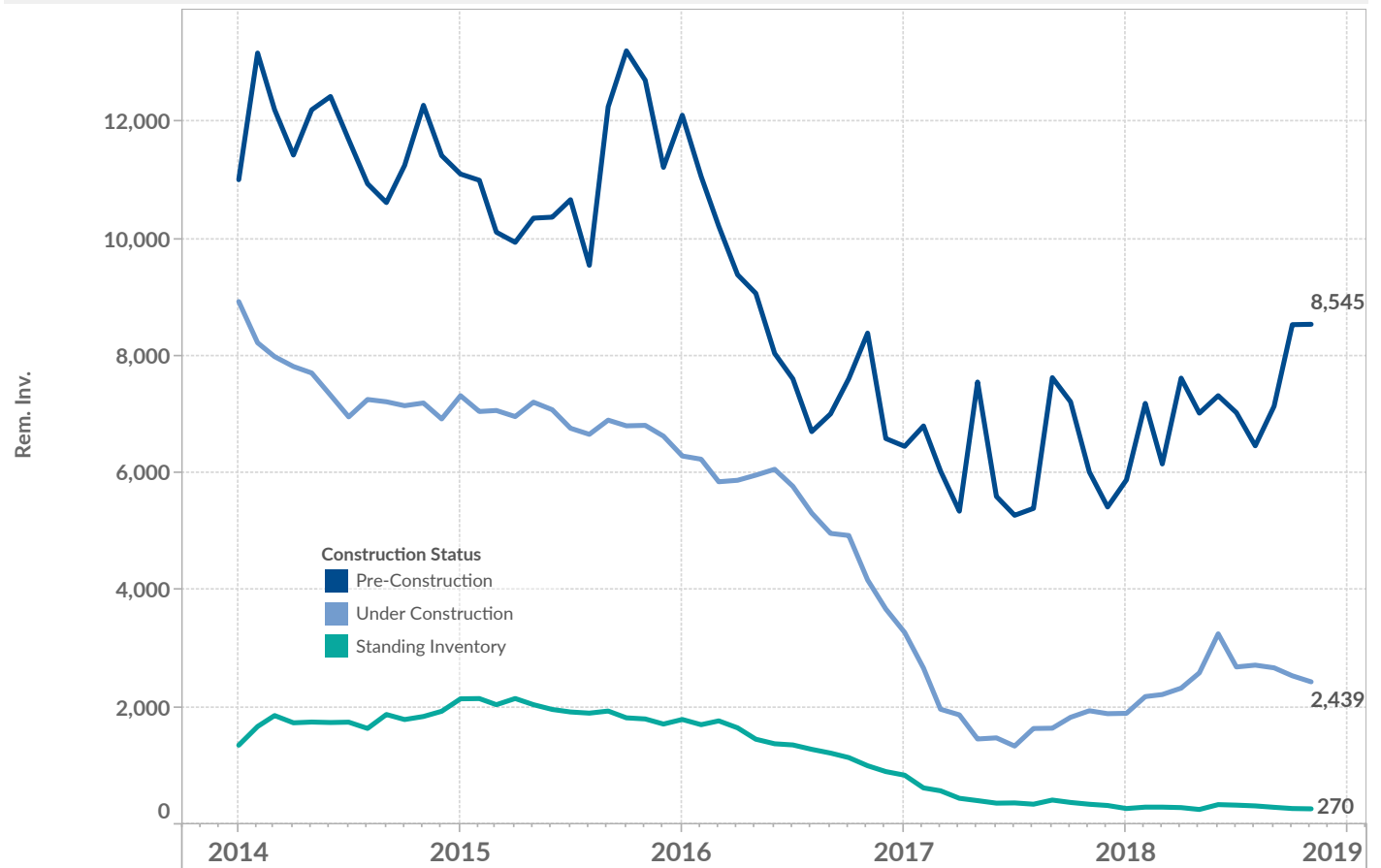


Remaining Inventory

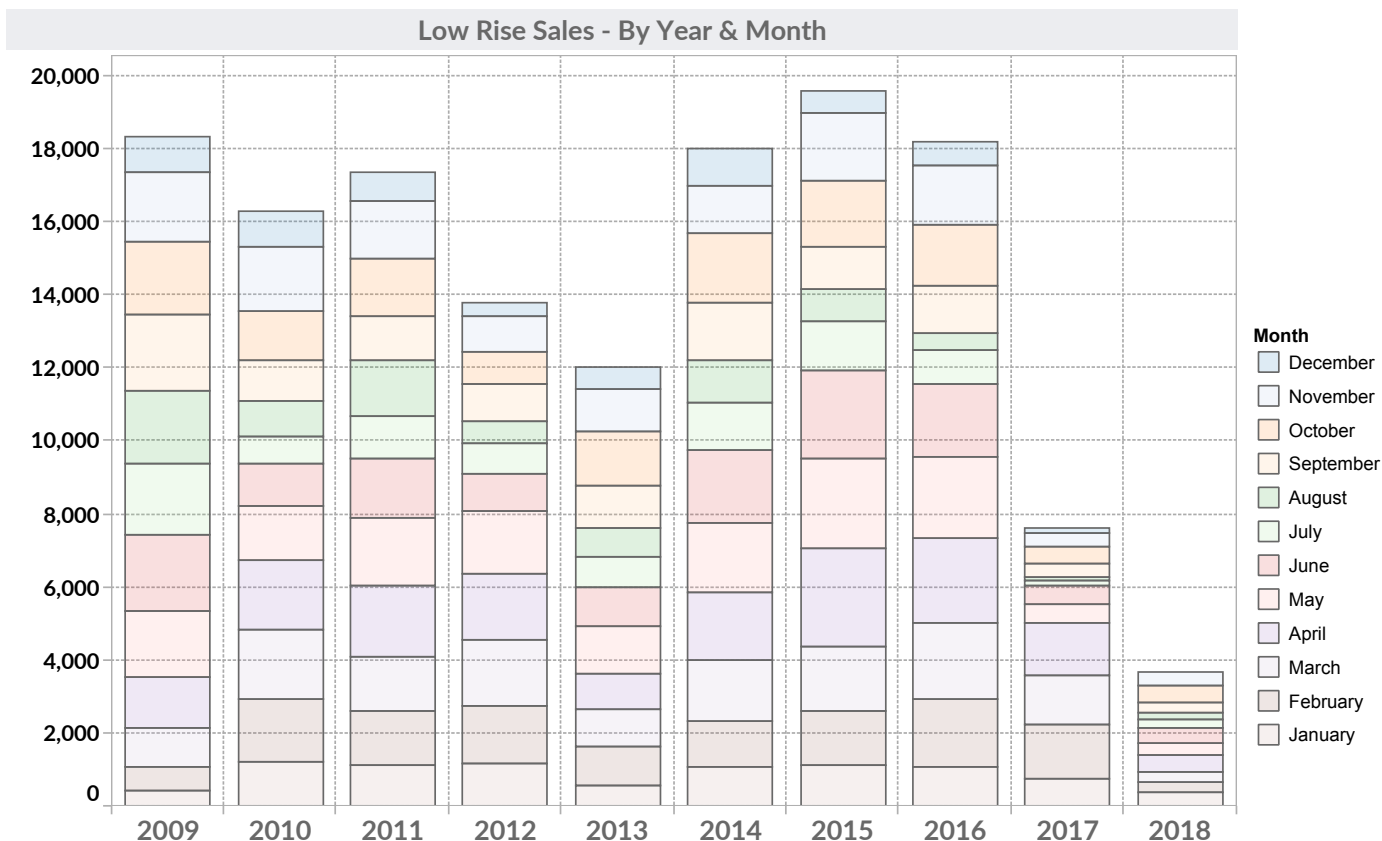
GTA - Monthly New Home Remaining Inventory



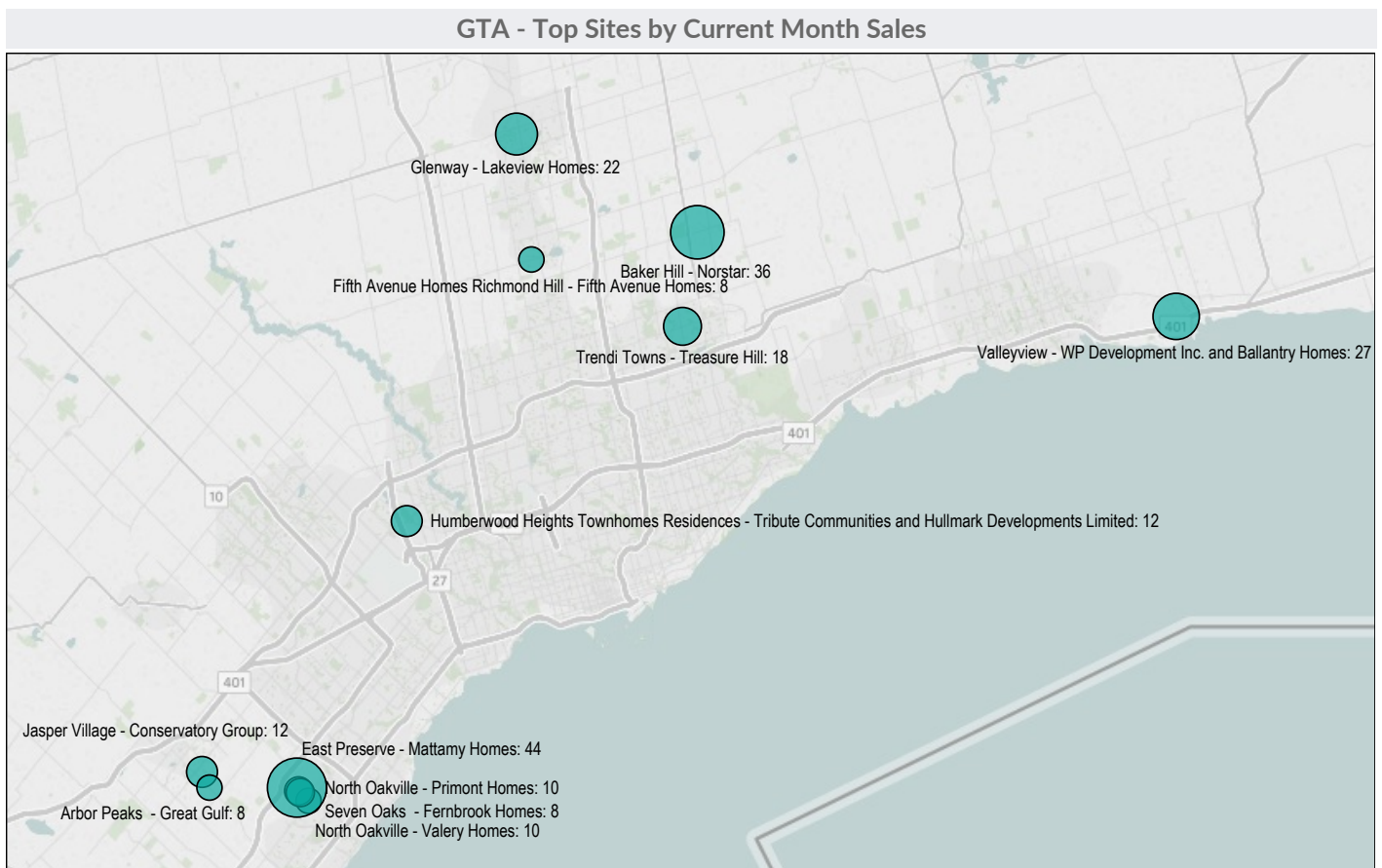
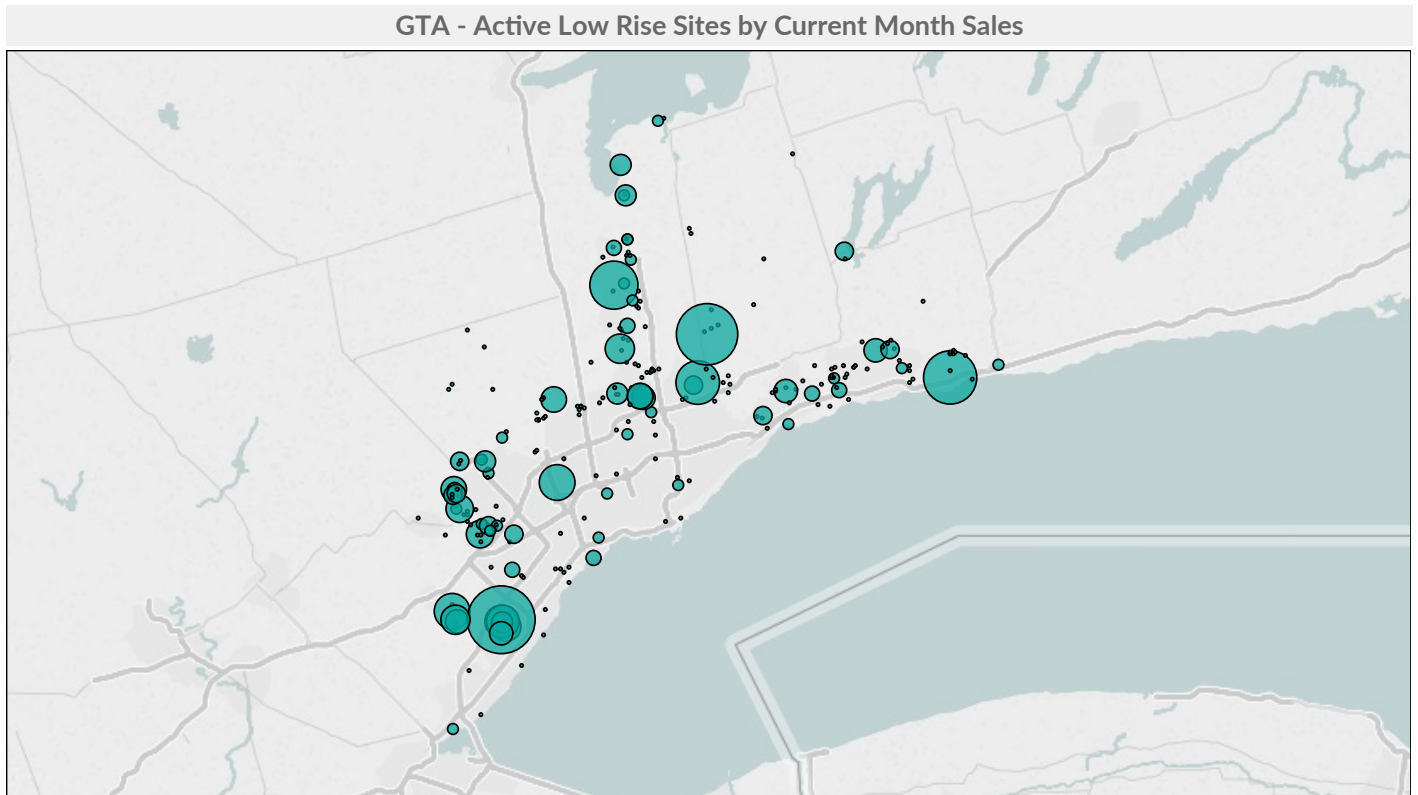
GTA - Monthly High Rise Rem. Inv. by Construction Status



Historical Sales Comparison



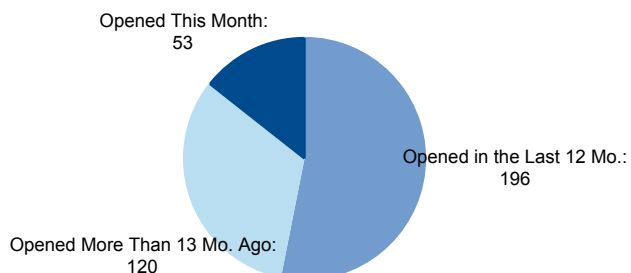
Current Sites



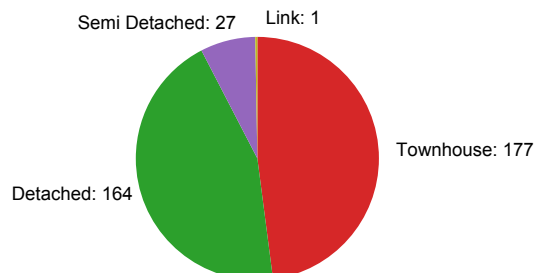
Monthly Sales Breakdown

Current Month Low Rise Sales Breakdown

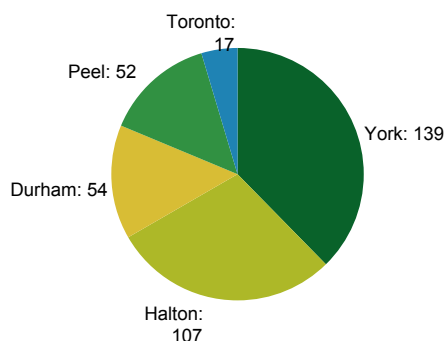
Sales by Opening Date



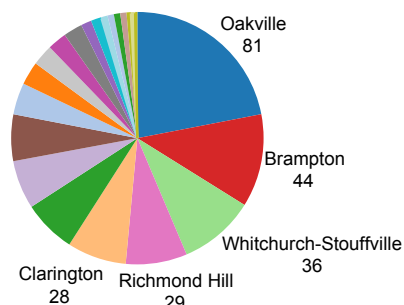
Sales by Product Type



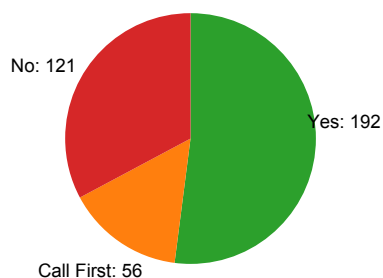
Sales by Region



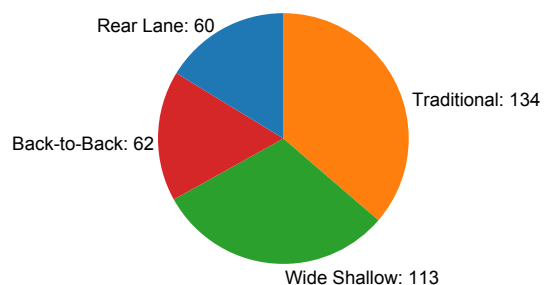
Sales by Municipality/Area



Sales by Sites with Broker Cooperation



Sales by Lot Type



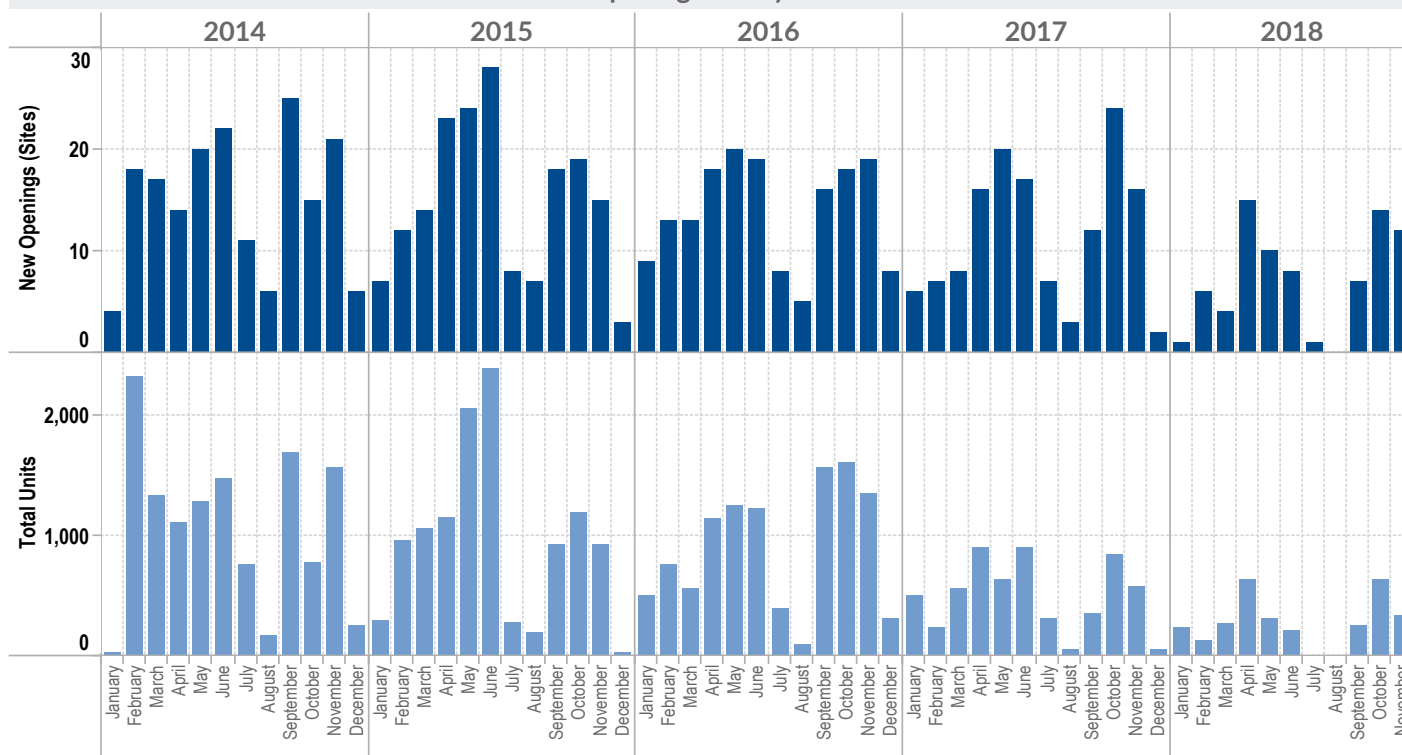
New Openings

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

Site Name	Tenure	Municipality	opening date	No# of Units	Current Month Sales	Rem Inv	Avg. \$/SF
Manors of Claireville - Royal Pine Homes	Condominium	Brampton	11/1/2018	61	0	61	
Glenway - Lakeview Homes	Freehold Common Element	Newmarket	11/3/2018	26	22	4	\$470
Harmony Gate - Sundance Homes	Freehold Common Element	Oshawa	11/3/2018	20	3	17	\$374
North Oakville - Lindvest	Freehold	Oakville	11/3/2018	35	4	31	\$501
North Oakville - Primont Homes	Freehold	Oakville	11/3/2018	15	6	9	\$466
North Oakville - Valery Homes	Freehold	Oakville	11/3/2018	36	10	26	\$509
Longview Ravine Estates - Bay Homes	Freehold	Mississauga	11/11/2018	32	3	29	\$502
Prosperity Park - Daniels Corporation	Condominium	Brampton	11/13/2018	26	0	26	\$352
Riverside Residences in Amesbury Village - Fernbrook Homes	Freehold	North York	11/16/2018	48	1	47	\$447
Ultra Sonic - Lindvest	Condominium	North York	11/16/2018	13	1	12	\$770
Breeze - Midhaven Homes	Freehold	Oshawa	11/17/2018	18	0	18	\$385
Upper Unionville - Fieldgate Homes	Freehold	Markham	11/27/2018	10	3	7	\$424
Grand Total				340	53	287	\$469

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	64	64		766	20.9%		20.9%	
Great Gulf	22	22	26	33	26	17	14	16	29	21	15		241	6.6%		27.5%	
Treasure Hill	9	6	3	46	5	22	21	12	5	16	23		168	4.6%		32.0%	
Paradise Developments	2	0	41	9	35	7	2	4	3	50	0		153	4.2%		36.2%	
Minto Developments	9	8	7	5	2	50	13	7	11	17	0		129	3.5%		39.7%	
Conservatory Group	4	6	8	7	13	4	11	13	9	20	23		118	3.2%		43.0%	
CountryWide Homes	0	2	4	4	8	25	15	4	20	25	6		113	3.1%		46.0%	
Fieldgate Homes	1	1	34	13	16	10	4	9	0	11	11		110	3.0%		49.0%	
Aspen Ridge Homes	0	1	0	3	2	26	12	7	14	16	15		96	2.6%		51.6%	
Tribute Communities and Hullmark Developments Limited										69	12		81	2.2%		53.9%	
Coscorp Inc.						23	14	7	16	10	3		73	2.0%		55.8%	
Lakeview Homes	0	9	5	0	2	0	0	1	17	10	25		69	1.9%		57.7%	
Regal Crest Homes	0	0	0	0	0	40	7	3	0	10	6		66	1.8%		59.5%	
Starlane Home Corporation			0	45	11	0	1	8	1	0	0		66	1.8%		61.3%	
Country Homes	23	14	9	12	2	0	0	0	0	0	0		60	1.6%		63.0%	
Greenpark Group	0	0	0	0	0	32	13	3	5	3	0		56	1.5%		64.5%	
Opus Homes	3	2	1	15	10	7	3	1	2	8	3		55	1.5%		66.0%	
Norstar										17	36		53	1.4%		67.4%	
Tribute Communities	1	1	13	8	7	5	0	0	11	2	0		48	1.3%		68.7%	
Wycliffe Homes					0	32	6	0	0	2	1		41	1.1%		69.9%	
Dunpar Homes	4	4	3	0	4	3	0	6	4	6	4		38	1.0%		70.9%	
LIV Communities	1	3	9	5	3	4	1	3	2	2	3		36	1.0%		71.9%	
	375	258	300	455	330	419	243	183	253	482	369		3,667				

Top Builders - Last 12 Months

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

	2017	2018												Total	Market Share		Cum. Mkt. Share	
Builder	December	January	February	March	April	May	June	July	August	September	October	November		%	%		%	
Mattamy Homes	36	257	122	69	50	17	37	23	36	27	64	64	802		21.0%		21.0%	
Great Gulf	6	22	22	26	33	26	17	14	16	29	21	15	247		6.5%		27.5%	
Treasure Hill	0	9	6	3	46	5	22	21	12	5	16	23	168		4.4%		31.9%	
Paradise Developments	1	2	0	41	9	35	7	2	4	3	50	0	154		4.0%		36.0%	
Minto Developments	18	9	8	7	5	2	50	13	7	11	17	0	147		3.9%		39.8%	
Conservatory Group	2	4	6	8	7	13	4	11	13	9	20	23	120		3.1%		43.0%	
CountryWide Homes	0	0	2	4	4	8	25	15	4	20	25	6	113		3.0%		45.9%	
Fieldgate Homes	1	1	1	34	13	16	10	4	9	0	11	11	111		2.9%		48.8%	
Aspen Ridge Homes	0	0	1	0	3	2	26	12	7	14	16	15	96		2.5%		51.4%	
Country Homes	23	23	14	9	12	2	0	0	0	0	0	0	83		2.2%		53.5%	
Tribute Communities and Hullmark Developments Limited											69	12	81		2.1%		55.7%	
Coscorp Inc.							23	14	7	16	10	3	73		1.9%		57.6%	
Lakeview Homes	0	0	9	5	0	2	0	0	1	17	10	25	69		1.8%		59.4%	
Regal Crest Homes	0	0	0	0	0	0	40	7	3	0	10	6	66		1.7%		61.1%	
Starlane Home Corporation				0	45	11	0	1	8	1	0	0	66		1.7%		62.9%	
Greenpark Group	0	0	0	0	0	0	32	13	3	5	3	0	56		1.5%		64.3%	
Opus Homes	0	3	2	1	15	10	7	3	1	2	8	3	55		1.4%		65.8%	
Norstar											17	36	53		1.4%		67.2%	
Tribute Communities	0	1	1	13	8	7	5	0	0	11	2	0	48		1.3%		68.4%	
Poetry Living	12				30	3							45		1.2%		69.6%	
Wycliffe Homes						0	32	6	0	0	2	1	41		1.1%		70.7%	
Dunpar Homes	1	4	4	3	0	4	3	0	6	4	6	4	39		1.0%		71.7%	
	145	375	258	300	455	330	419	243	183	253	482	369	3,812					

Top Sites

GTA - Top Low Rise Sites by Current Month Sales

Site Name	Municipality	Product Type	Lot Size	2018 November
East Preserve - Mattamy Homes	Oakville	Townhouse	20'	7
			21'	18
			23'	19
			Total	44
Baker Hill - Norstar	Whitchurch-Stouffville	Townhouse	17'	9
			18'	27
			Total	36
Valleyview - WP Development Inc. and Ballantry Homes	Clarington	Detached	33'	4
			37'	15
			40'	6
			48'	2
			Total	27
Glenway - Lakeview Homes	Newmarket	Detached	50'	22
			Total	22
Trendi Towns - Treasure Hill	Markham	Townhouse	18'	18
			Total	18
Humberwood Heights Townhomes Residences - Tribute Communities and Hullmark Developments Limited	Etobicoke	Townhouse	20'	12
			Total	12
Jasper Village - Conservatory Group	Milton	Detached	36'	0
		Semi Detached	25'	12
		Total		12
North Oakville - Primont Homes	Oakville	Detached	36'	1
			38'	3
			41'	4
			43'	0
			45'	2
			Total	10
North Oakville - Valery Homes	Oakville	Detached	36'	2
			38'	3
			43'	5
			Total	10
Arbor Peaks - Great Gulf	Milton	Detached	31'	0
			36'	3
			45'	4
		Semi Detached	26'	1
			Total	8
Fifth Avenue Homes Richmond Hill - Fifth Avenue Homes	Richmond Hill	Semi Detached	30'	2
		Townhouse	19'	6
		Total		8
Seven Oaks - Fernbrook Homes	Oakville	Detached	38'	1
			43'	5
		Townhouse	25'	2
			Total	8

Yr. Over Yr. Sales Comparison

Current Month Sales & Same Month Last Year by Municipality

Region	Municipality	November 2018					November 2017				
		Detached	Link	Semi Detached	Townhouse	Total	Detached	Link	Semi Detached	Townhouse	Total
Durham	Ajax	0		0	2	2	0		0	0	0
	Brock	0				0					
	Clarington	28	0	0	0	28	9	0	0	6	15
	Oshawa	1		0	8	9	5		0	1	6
	Pickering	0			9	9	4			1	5
	Scugog	2	1			3	1				1
	Uxbridge	0			0	0	0			2	2
	Whitby	3		0	0	3	26		3	17	46
	Total	34	1	0	19	54	45	0	3	27	75
Halton	Burlington				1	1				0	0
	Halton Hills	0				0	0				0
	Milton	7		13	5	25	20		16	18	54
	Oakville	30			51	81	4			30	34
	Total	37		13	57	107	24		16	48	88
Peel	Brampton	23	0	8	13	44	31		0	7	38
	Caledon	1		0	2	3	5		0	0	5
	Mississauga	3		0	2	5	0		0	18	18
	Total	27	0	8	17	52	36		0	25	61
Toronto	Etobicoke	0			15	15	1			3	4
	North York	0	0	1	1	2	0			1	1
	Scarborough								0		0
	Toronto			0	0	0				16	16
	Total	0	0	1	16	17	1		0	20	21
York	Aurora	3			0	3	3			1	4
	East Gwillimbury	4		0	1	5	5		0		5
	Georgina	9			1	10	2			1	3
	King	0				0	0				0
	Markham	0			22	22	0			22	22
	Newmarket	22	0		1	23		0		2	2
	Richmond Hill	18		5	6	29	5		0	44	49
	Vaughan	10	0	0	1	11	2		1	9	12
	Whitchurch-Stouffville	0			36	36	0				0
	Total	66	0	5	68	139	17	0	1	79	97
Grand Total		164	1	27	177	369	123	0	20	199	342

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	39		7	14	60	89		17	55	161
	Brock	1				1	2				2
	Clarington	51	1	0	20	72	145	12	1	134	292
	Oshawa	47		2	37	86	154		24	138	316
	Pickering	8			45	53	146			121	267
	Scugog	9	7			16	40	25			65
	Uxbridge	0			3	3	9			50	59
	Whitby	191		11	181	383	285		35	142	462
	Total	346	8	20	300	674	870	37	77	640	1,624
Halton	Burlington				13	13				12	12
	Halton Hills	12				12	59				59
	Milton	279		77	191	547	28		34	52	114
	Oakville	41			208	249	220			58	278
	Total	332		77	412	821	307		34	122	463
Peel	Brampton	478	5	107	267	857	414	7	136	483	1,040
	Caledon	121		0	70	191	133		18	32	183
	Mississauga	6		3	23	32	34		39	73	146
	Total	605	5	110	360	1,080	581	7	193	588	1,369
Toronto	Etobicoke	16			101	117	8			35	43
	North York	5	0	1	50	56	22	1	45	78	146
	Scarborough			0		0					
	Toronto			1	24	25			1	3	4
	Total	21	0	2	175	198	30	1	46	116	193
York	Aurora	35			2	37	130			36	166
	East Gwillimbury	85		9	38	132	144		71	75	290
	Georgina	158			6	164	104			36	140
	King	3				3	12				12
	Markham	0			108	108	12			213	225
	Newmarket	24	3		5	32	13	3		4	20
	Richmond Hill	52		8	127	187	196		45	240	481
	Vaughan	191	3	9	114	317	248	5	12	218	483
	Whitchurch-Stouffville	6			53	59	45			32	77
	Total	554	6	26	453	1,039	904	8	128	854	1,894
Grand Total	1,858	19	235	1,700	3,812	2,692	53	478	2,320	5,543	

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