



2026

# Enhanced Growth Monitoring Report



# Contents

---

<b>Introduction</b>	<b>2</b>
<b>Part 1   Development Data &amp; Trends</b>	<b>3</b>
1.1   From Development Application to Build-Out	3
1.2   Burlington's 2025 Housing Story	7
1.3   Halton Hill's 2025 Housing Story	8
1.4   Milton's 2025 Housing Story	9
1.5   Oakville's 2025 Housing Story	10
1.6   Locational Review – Active Growth Areas	11
<b>Part 2   Water and Wastewater Servicing Capacity</b>	<b>14</b>
2.1   2026 Water and Wastewater System Capacity Status	14
2.2   Status of Infrastructure Delivery	16
<b>Part 3   Allocation Program Monitoring</b>	<b>17</b>
3.1   Allocation Program Status Update	17
3.2   Developer Interest Survey Results	19
<b>Conclusion and Next Steps</b>	<b>20</b>



# Introduction

---

In response to the commitments of Halton's Local Municipalities to deliver 92,500 housing units by 2031, Halton Region initiated an annual Enhanced Growth Monitoring (EGM) report, providing a data-informed snapshot of development activity, the resulting housing growth, and the related servicing capacity required to support it. By linking the analysis of development trends with system capacity, the report provides a point-in-time window into the behind-the-scenes process of supporting timely infrastructure planning and prioritization; fair servicing distribution decisions; and the support of local housing commitments. This is the second annual Enhanced Growth Monitoring (EGM) report.



## Current Market Conditions

Recent residential development trends reflect ongoing pressures from elevated financing costs, construction cost escalation, and broader economic uncertainty. These conditions have contributed to slower movement from development approvals to construction, with many developments advancing more slowly due to market-related reasons rather than servicing constraints. Despite these challenges, the development pipeline remains active with a substantial number of units moving through the application process, with many already approved, signaling sustained longer-term demand for housing and servicing capacity when market conditions improve.

*Methodology Note: Pipeline data utilized throughout this report is received from Local Municipalities. The results of any analysis conducted may be subject to limitations based on data completeness or methodology differences in source data.*

# Part 1 | Development Data & Trends

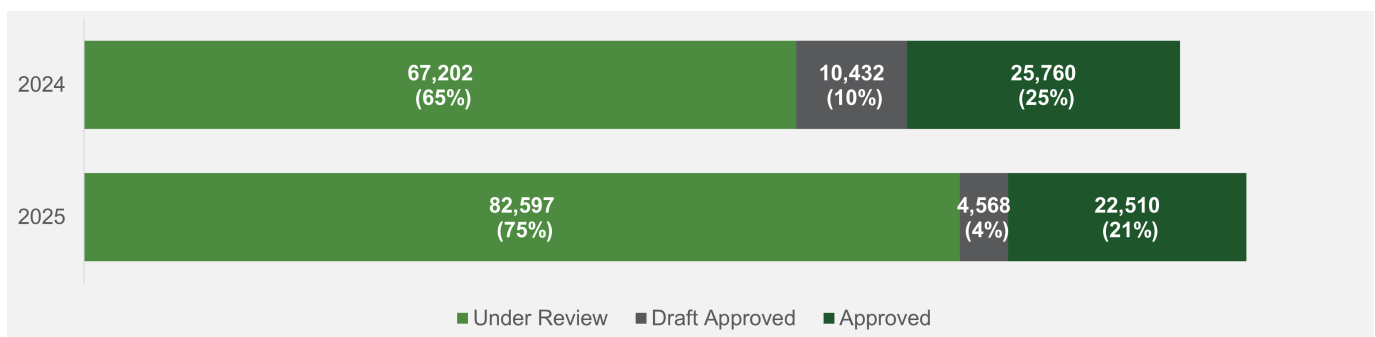
This section reviews residential development trends across Halton which is used to assess how actual development compares to anticipated growth and servicing assumptions to inform infrastructure planning, service capacity management, and Allocation program decisions.

## 1.1 | From Development Application to Build-Out

The development pipeline tracks residential projects as they move through the Local Municipal planning and approvals process, providing insight into timing of housing delivery and associated infrastructure demand. Following approval, developers assesses market conditions to determine when to proceed to building permit and construction. Development may also rely on local infrastructure which can also influence the timing of development, however that is outside the scope of this review.



**Status of Residential Development Pipeline (Year End 2024 and 2025)**



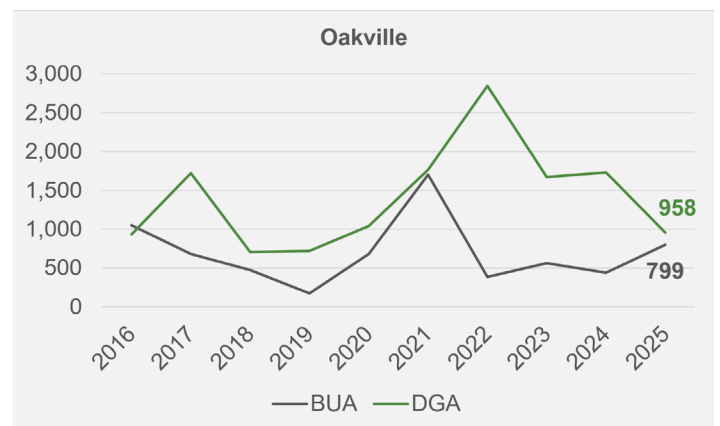
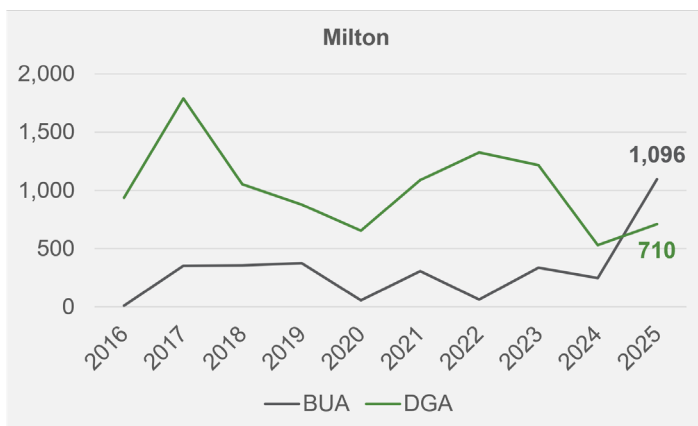
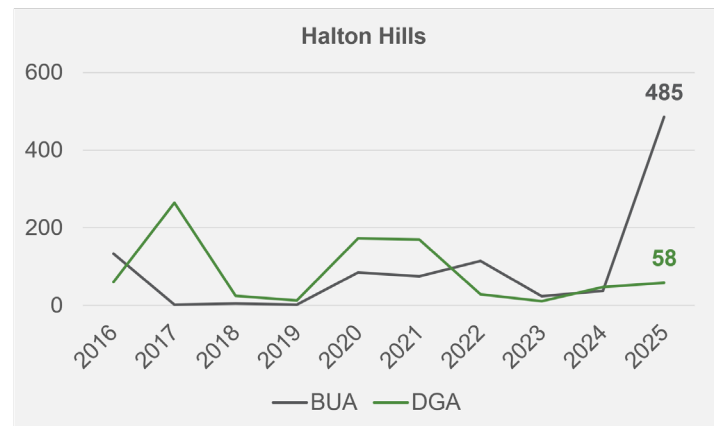
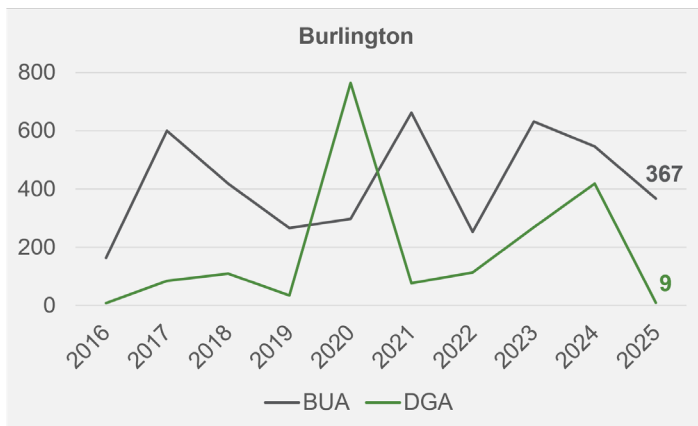
The year-end 2024 development application pipeline forms the basis for housing construction and completions in 2025. In turn, the year-end 2025 pipeline provides a snapshot that sets the stage for construction activity currently happening in 2026.

# Part 1 | Development Data & Trends



The issuance of a building permit represents the clearest indicator that a project is in the final stage before housing is delivered. Following permit issuance, housing starts, units under construction, and completions provide context of built-form activity across the region. Together, these indicators provide a point-in-time snapshot of progress in the delivery of housing and corresponding servicing capacity uptake.

## Issued Permits for New Residential Unit Construction by Municipality - Ten Year Trend

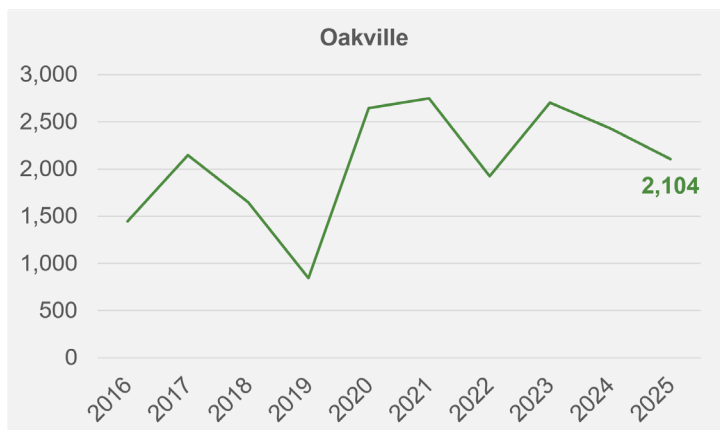
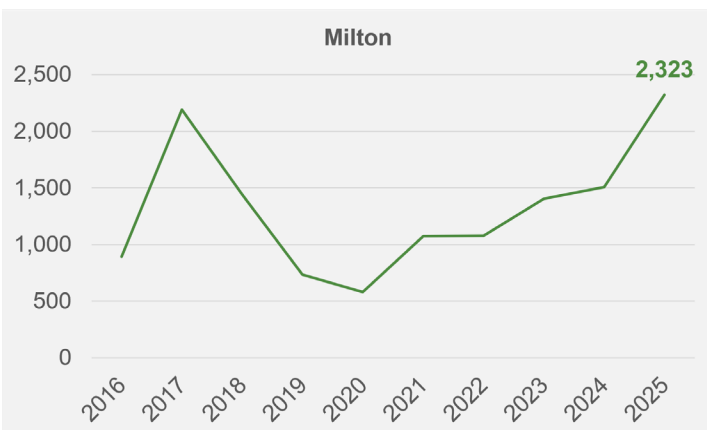
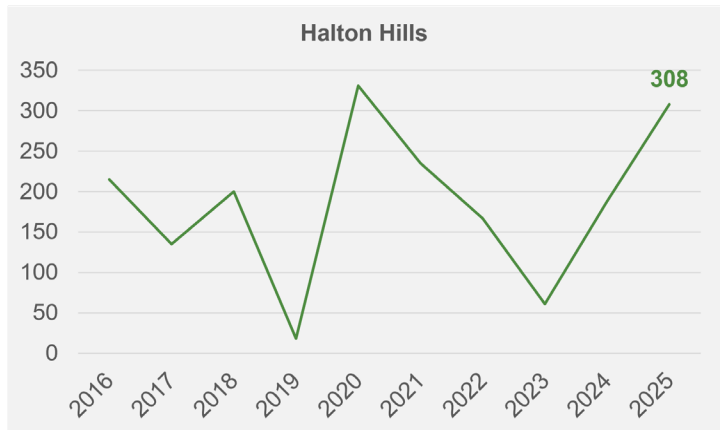
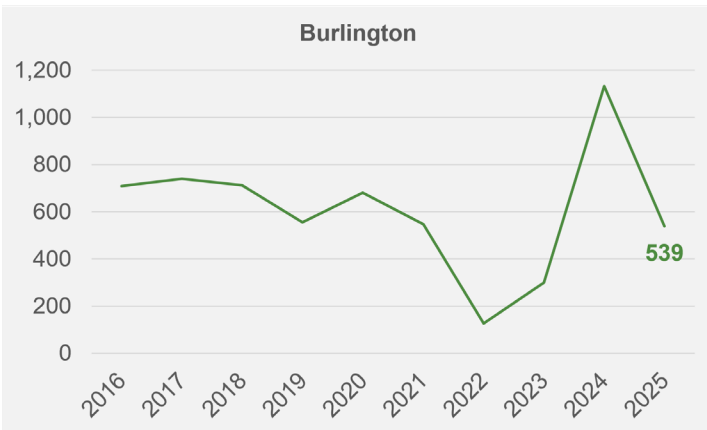


Data Note: Some permit units are not assigned BUA/DGA classification in the dataset and therefore are not shown in the line charts above. These permit units are, however, included in the total permit counts reported in report Sections 1.2 to 1.5.

# Part 1 | Development Data & Trends



## Housing Starts by Municipality - Ten Year Trend

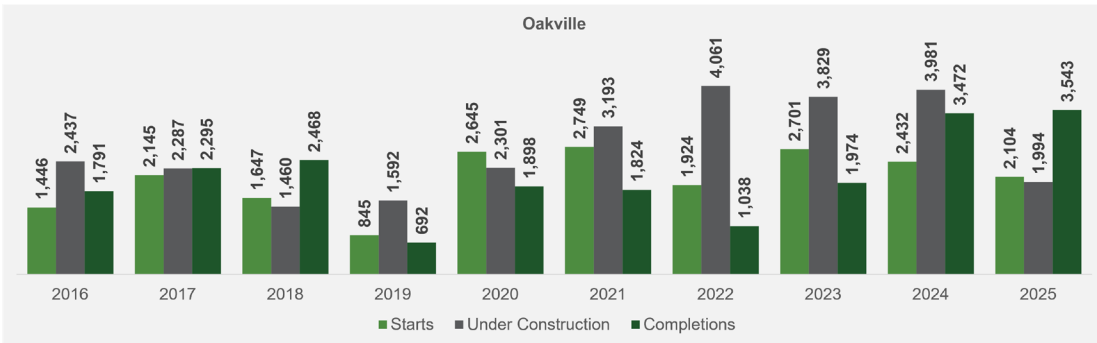
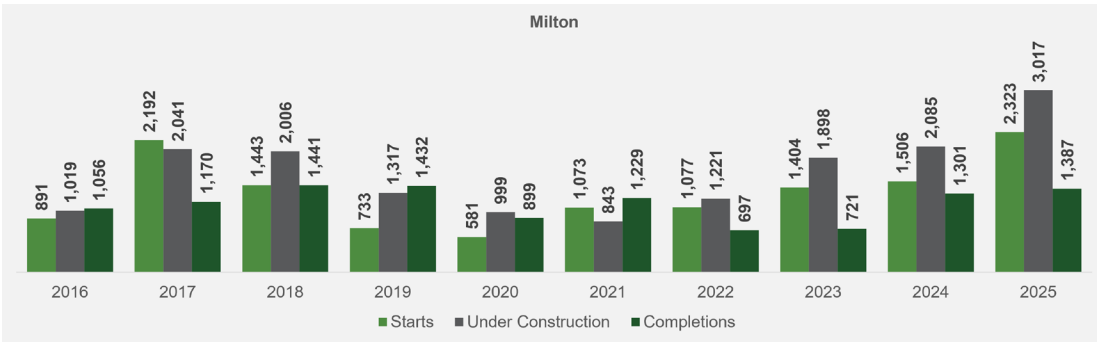
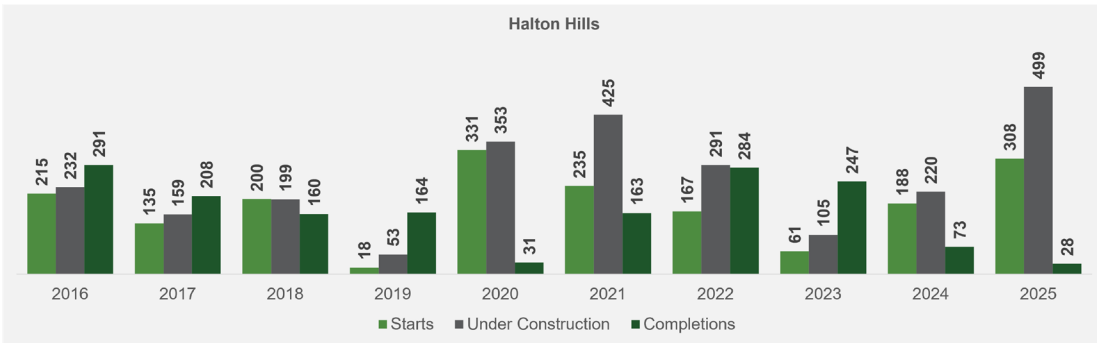
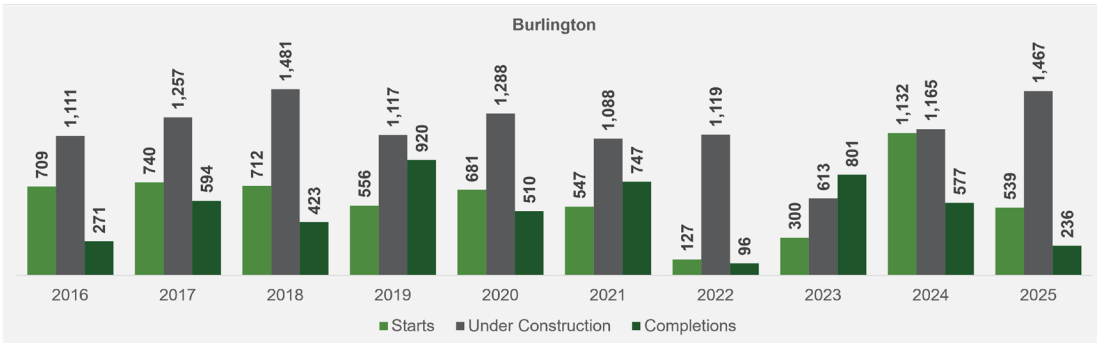


Data Note: New housing starts capture the initiation of construction once a building reaches grade level as defined by Canada Mortgage & Housing Corporation (CMHC).

# Part 1 | Development Data & Trends

Recent historical trends highlights how construction activity has progressed across each Local Municipality, providing insight into the advancement of development over time.

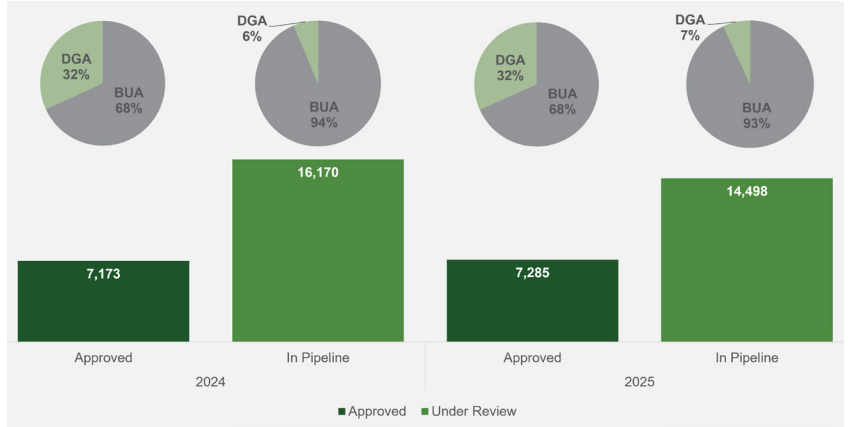
## Starts, Under Construction, and Completions by Municipality - Ten Year Trend



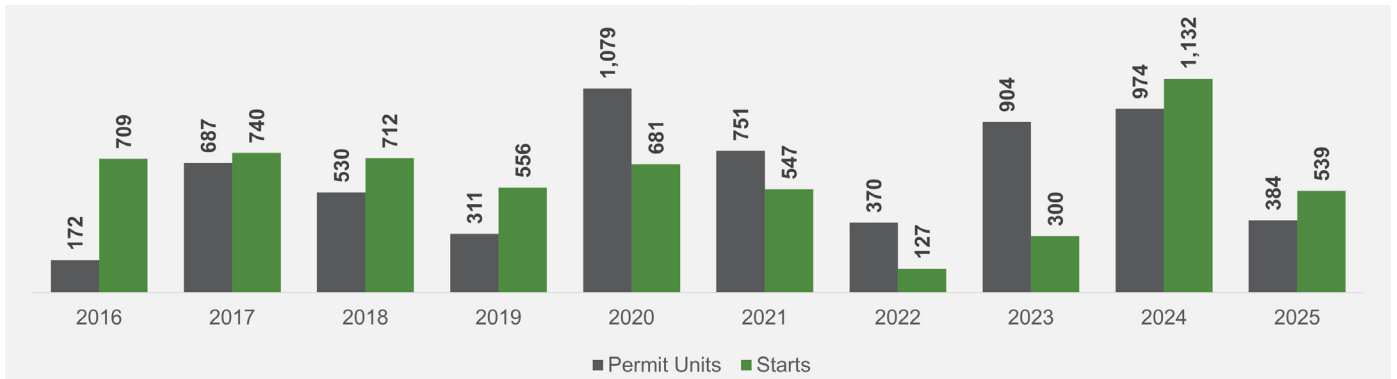
# Part 1 | Development Data & Trends

## 1.2 | Burlington's 2025 Housing Story

### Status of Residential Development Pipeline (Year End 2024 and 2025)

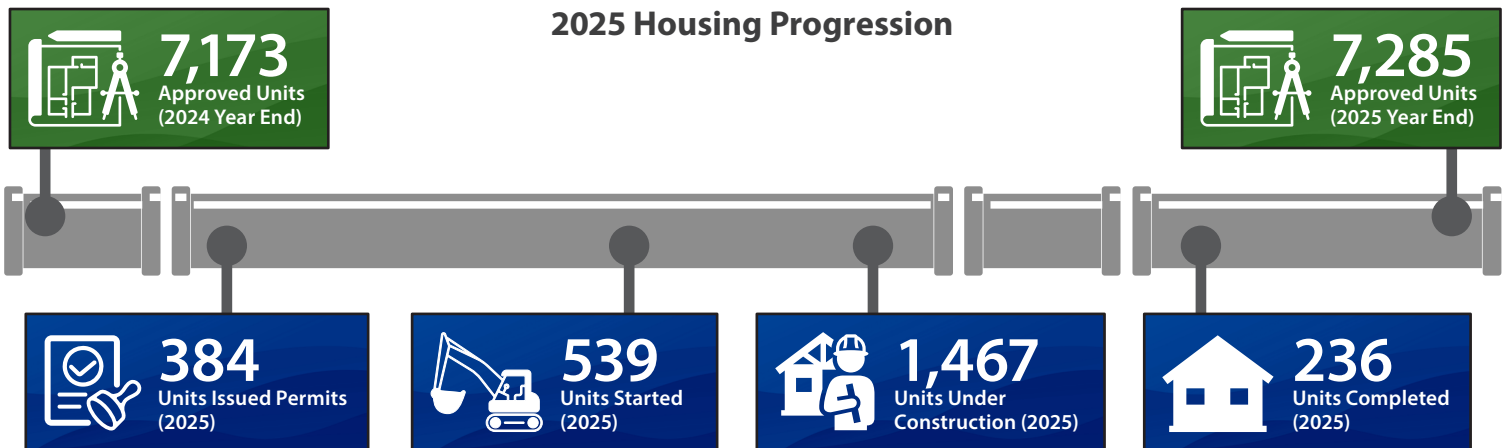


### Permit Units vs. Housing Starts - Ten Year Trend



Analysis of the pipeline data shows limited movement of 384 approved units to permit and 539 units to construction start in 2025. Most permit activity reflected the advancement of legacy approvals issued prior to 2024 which aligns with the typical lag between planning approval and construction readiness. 236 units were completed in 2025.

### 2025 Housing Progression

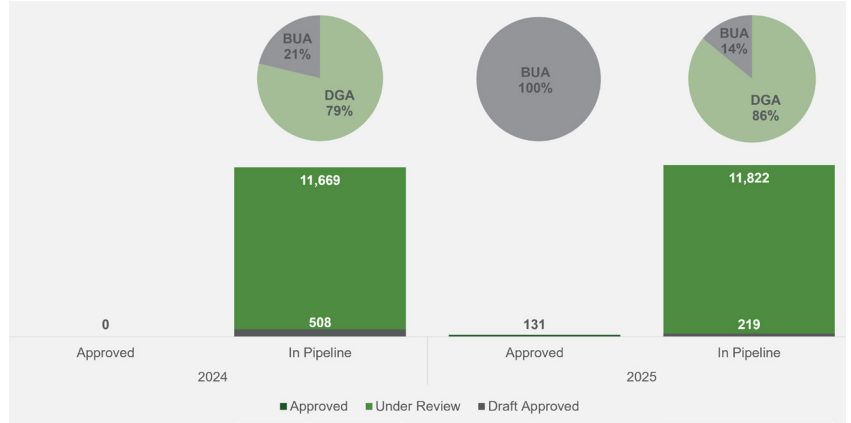


Note: This figure provides a point-in-time CMHC data as a snapshot of Burlington's housing statistics to show generalized movement across stages. It is not meant to imply tracking of individual projects over time.

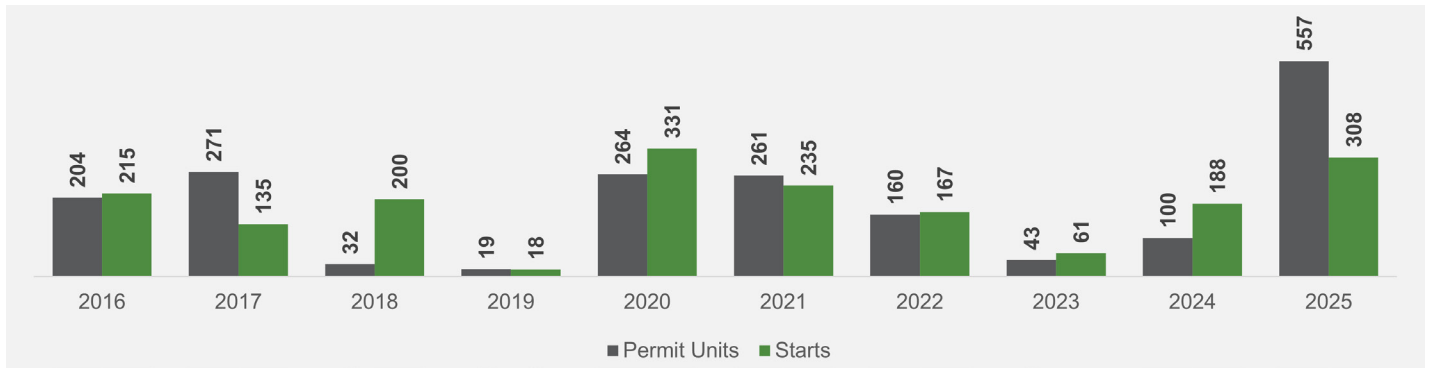
# Part 1 | Development Data & Trends

## 1.3 | Halton Hill's 2025 Housing Story

### Status of Residential Development Pipeline (Year End 2024 and 2025)

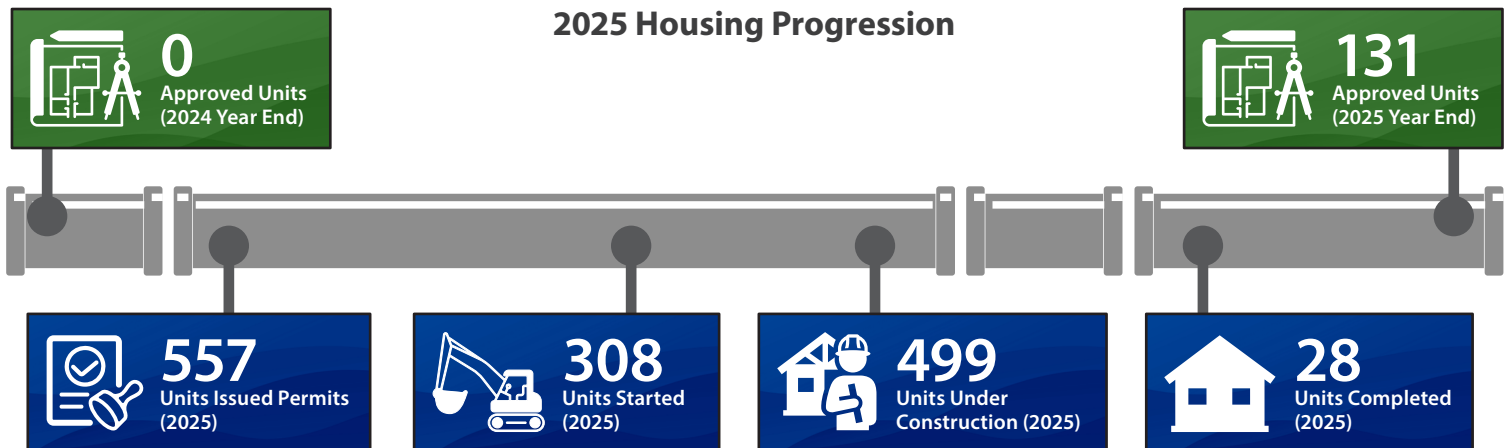


### Permit Units vs. Housing Starts - Ten Year Trend



Analysis of the pipeline data shows limited movement of 557 approved units to permit and 308 units to construction start in 2025. Most permit activity reflected the advancement of legacy approvals issued prior to 2024 which aligns with the typical lag between planning approval and construction readiness. 28 units were completed in 2025.

### 2025 Housing Progression

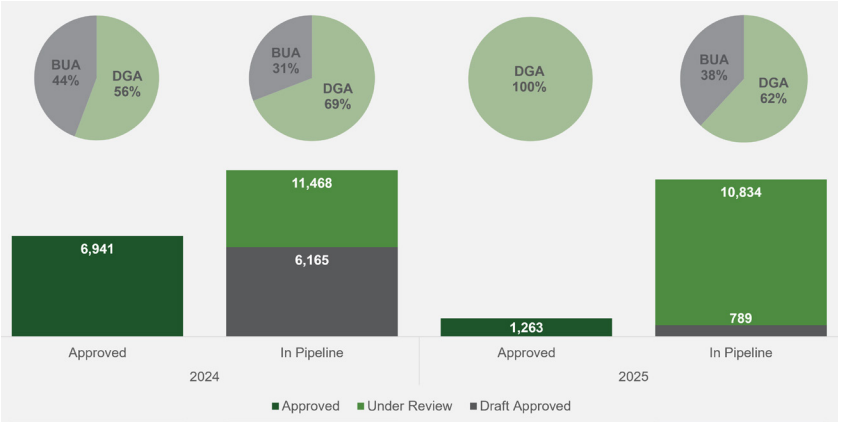


Note: This figure provides a point-in-time CMHC data as a snapshot of Halton Hill's housing statistics to show generalized movement across stages. It is not meant to imply tracking of individual projects over time.

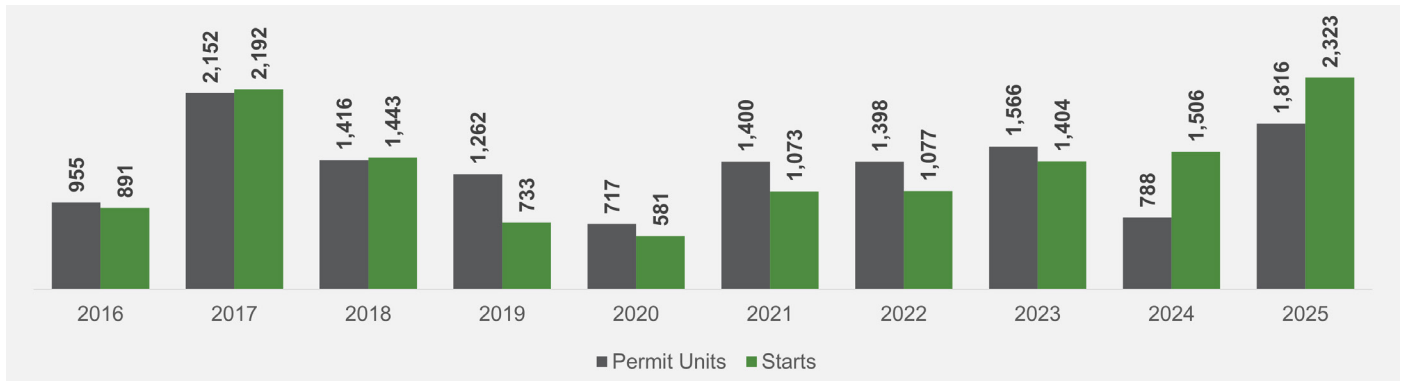
# Part 1 | Development Data & Trends

## 1.4 | Milton's 2025 Housing Story

### Status of Residential Development Pipeline (Year End 2024 and 2025)

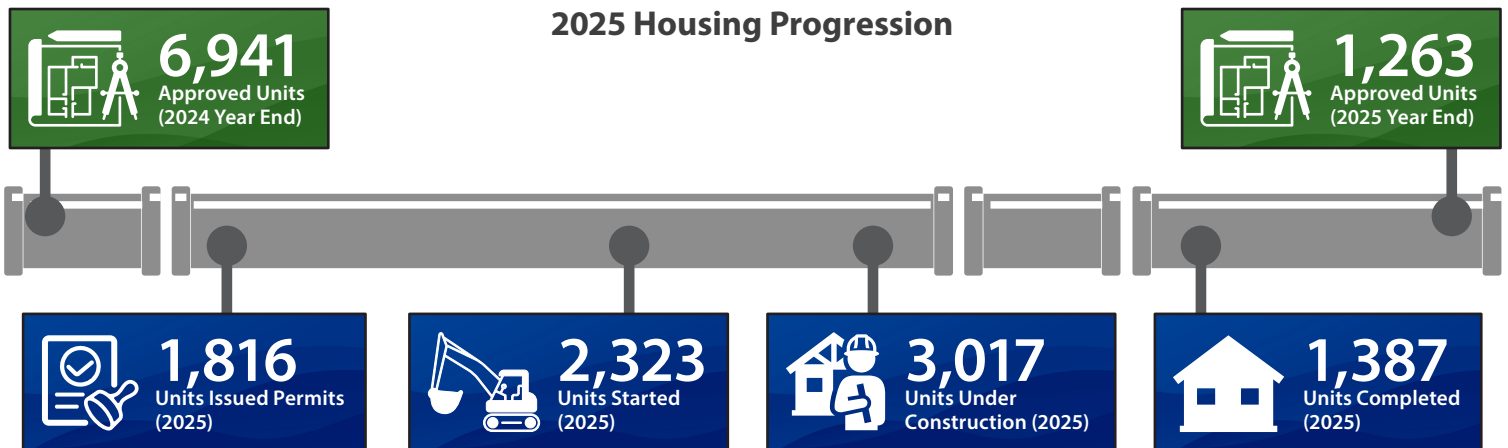


### Permit Units vs. Housing Starts - Ten Year Trend



Analysis of the pipeline data shows movement of 1,816 approved units to permit and 2,323 units to construction start in 2025. Most permit activity reflected the advancement of legacy approvals issued prior to 2024 which aligns with the typical lag between planning approval and construction readiness. 1,387 units were completed in 2025.

### 2025 Housing Progression

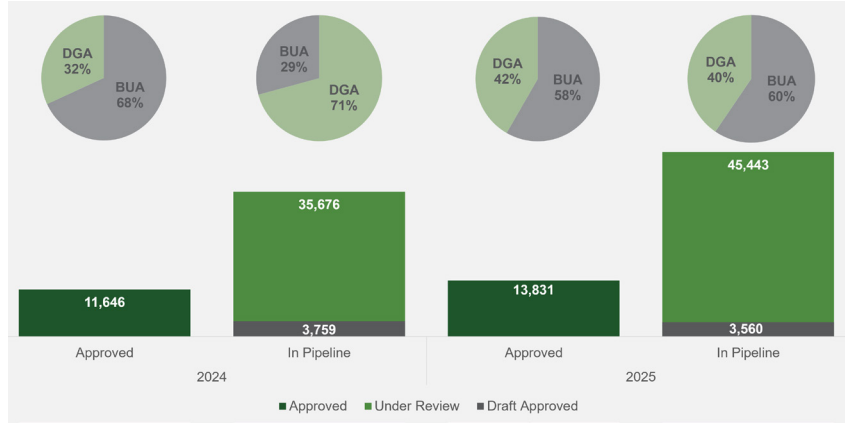


Note: This figure provides a point-in-time CMHC data as a snapshot of Milton's housing statistics to show generalized movement across stages. It is not meant to imply tracking of individual projects over time.

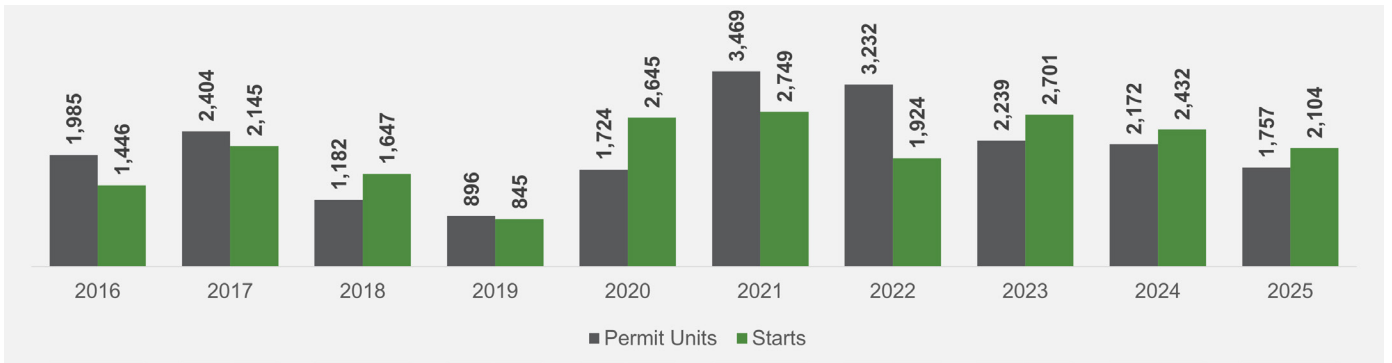
# Part 1 | Development Data & Trends

## 1.5 | Oakville's 2025 Housing Story

### Status of Residential Development Pipeline (Year End 2024 and 2025)

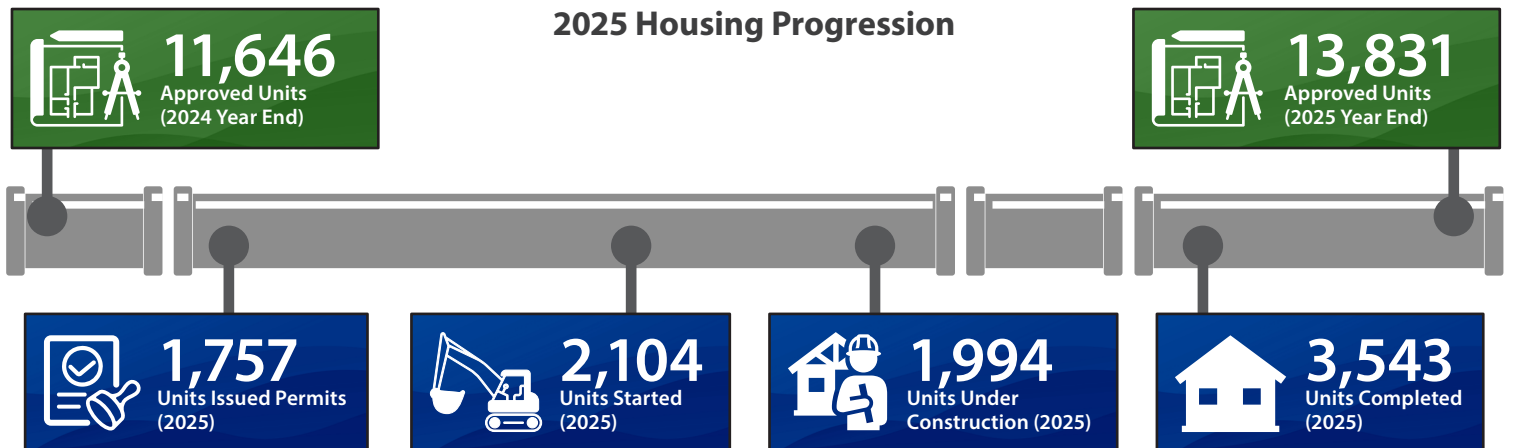


### Permit Units vs. Housing Starts - Ten Year Trend



Analysis of the pipeline data shows movement of 1,757 approved units to permit and 2,104 units to construction start in 2025. Most permit activity reflected the advancement of legacy approvals issued prior to 2024 which aligns with the typical lag between planning approval and construction readiness. 1,994 units were completed in 2025.

### 2025 Housing Progression



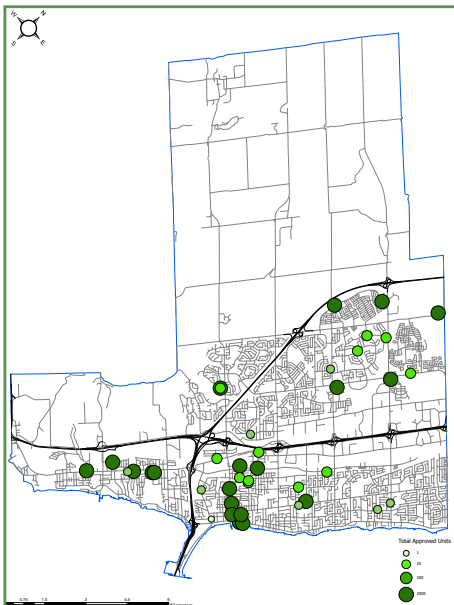
Note: This figure provides a point-in-time CMHC data as a snapshot of Oakville's housing statistics to show generalized movement across stages. It is not meant to imply tracking of individual projects over time.

# Part 1 | Development Data & Trends

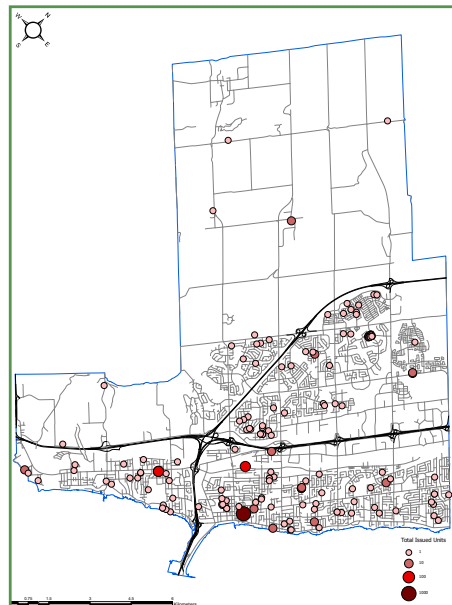
## 1.6 | Locational Review – Growth Areas by Municipality

The heat maps below highlight volume of application approvals and building permit issuance to provide a snapshot of the active development areas in each Local Municipality.

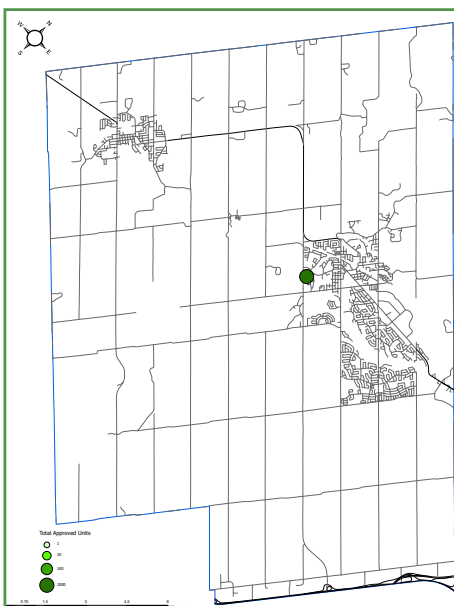
### Burlington: Application Approvals



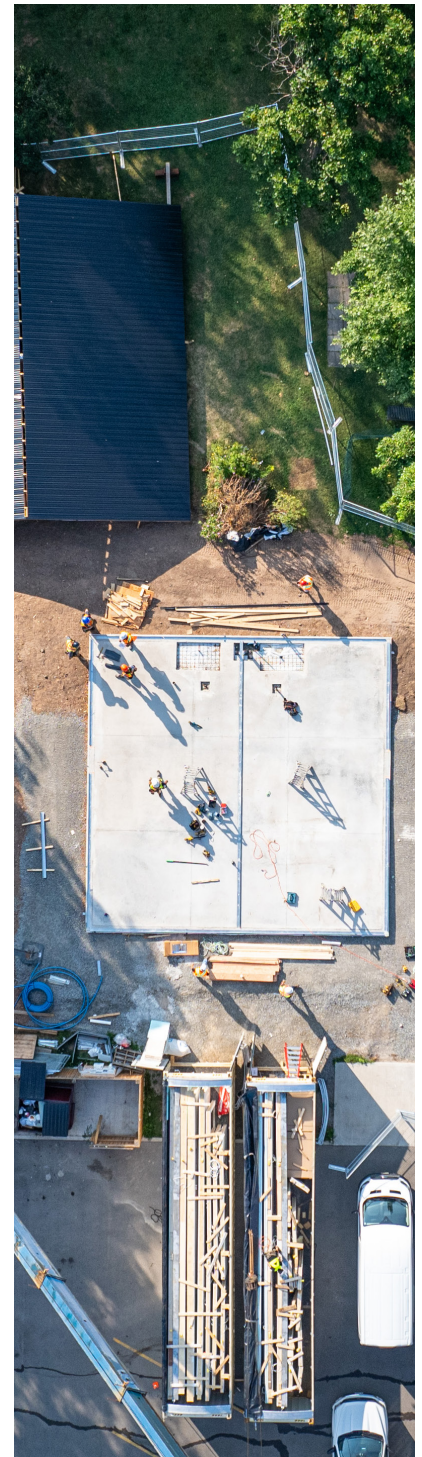
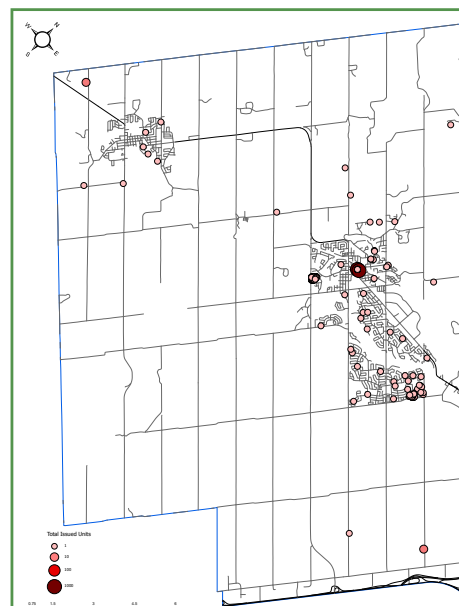
### Burlington: Building Permits Issued



### Halton Hills: Application Approvals

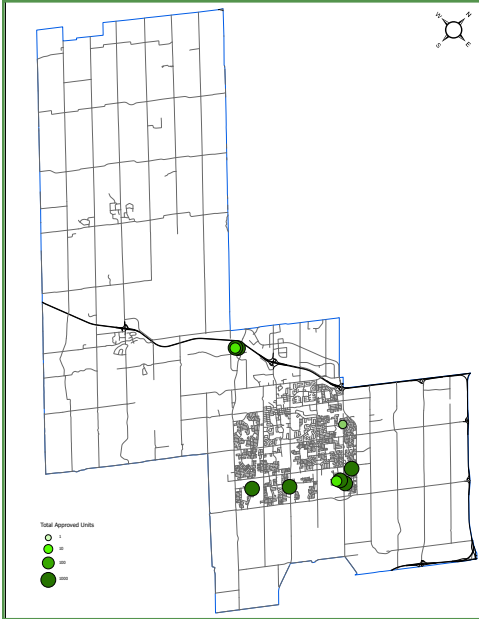


### Halton Hills: Building Permits Issued

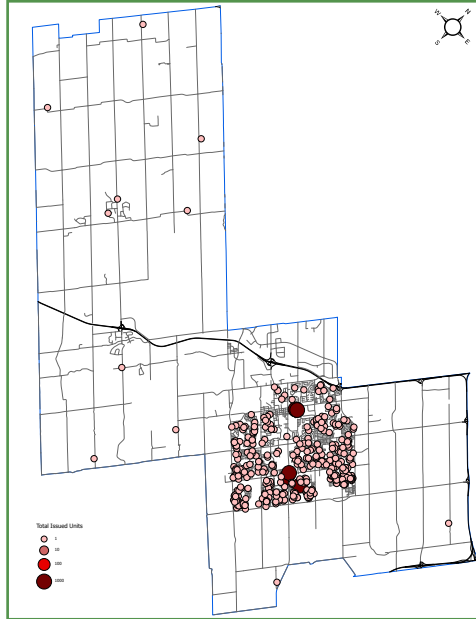


# Part 1 | Development Data & Trends

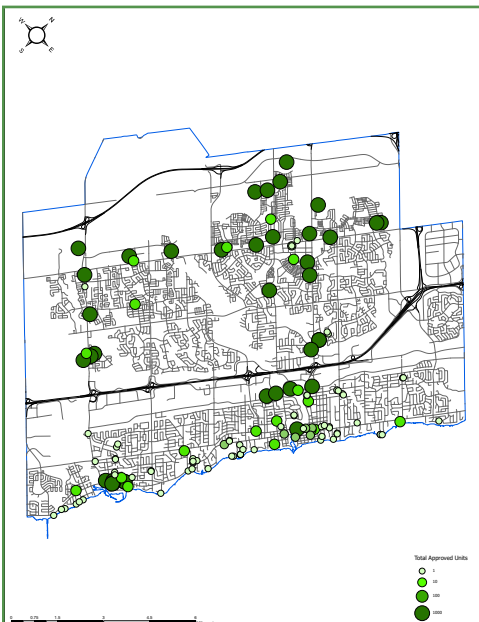
### Milton: Application Approvals



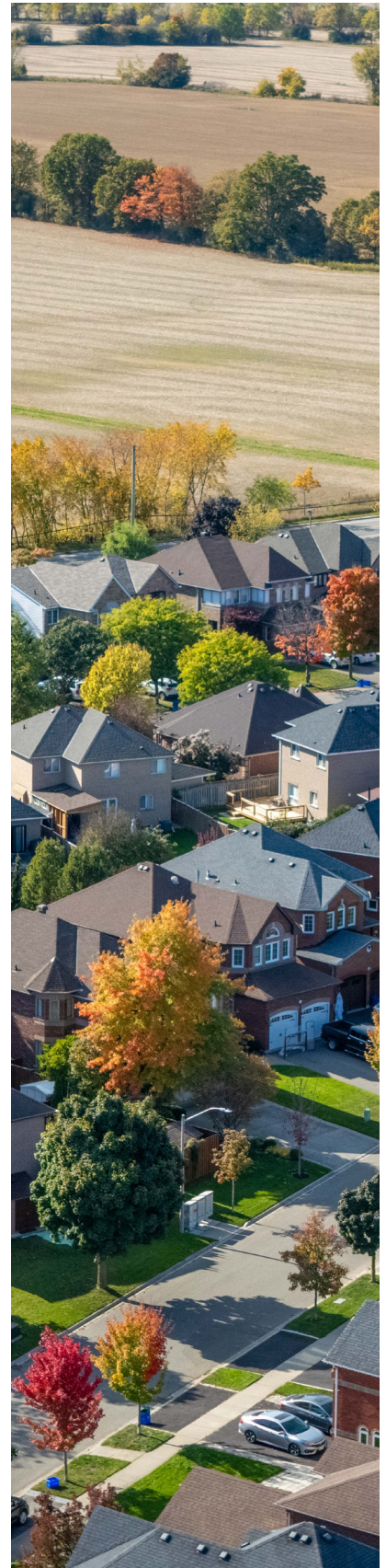
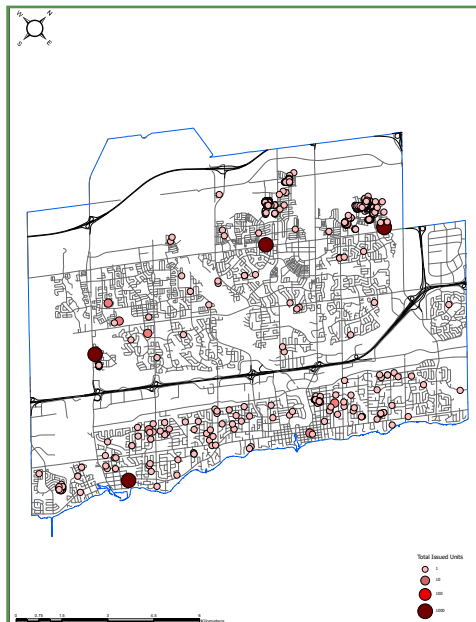
### Milton: Building Permits Issued



### Oakville: Application Approvals



### Oakville: Building Permits Issued

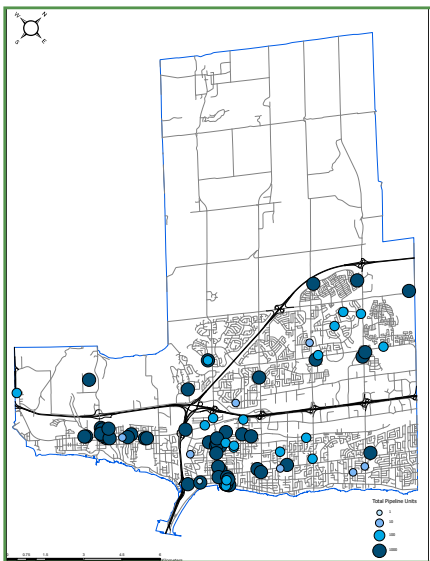


# Part 1 | Development Data & Trends

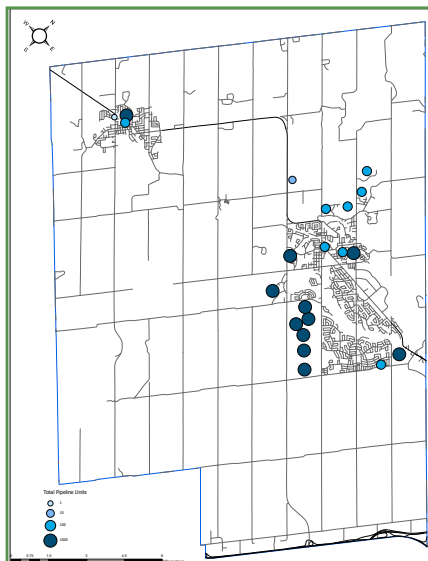
## Upcoming Growth Areas (2 to 5+ Years)

Growth does not occur evenly across municipalities. Where growth is happening, how much is expected, and the timing or phasing matters. The Region relies on pairing internal data together with development pipeline data and works closely with Local Municipalities to respond to location-specific needs and address localized service demand. The maps below highlight areas that are expected to grow over the next 2 to 5+ years (approximately) and support service prioritization decisions.

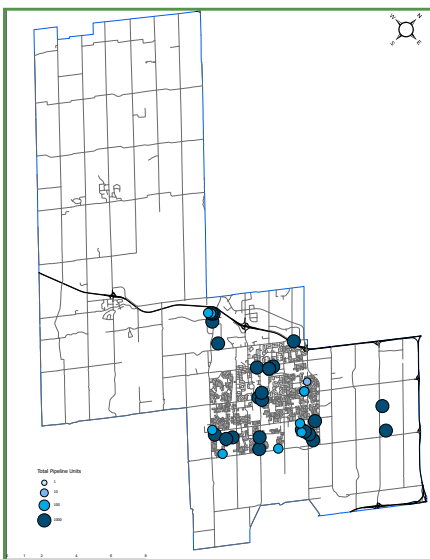
### Upcoming Growth in Burlington



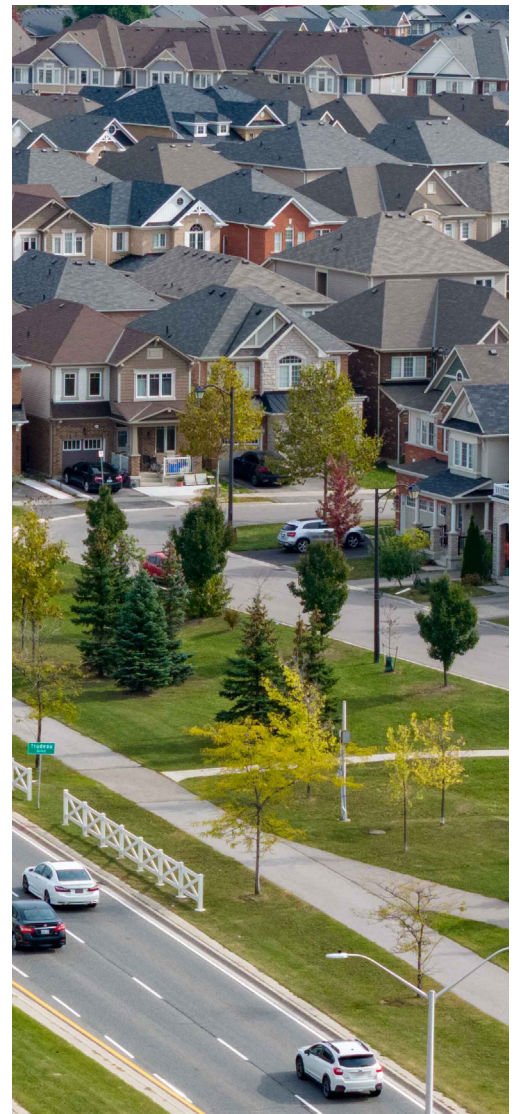
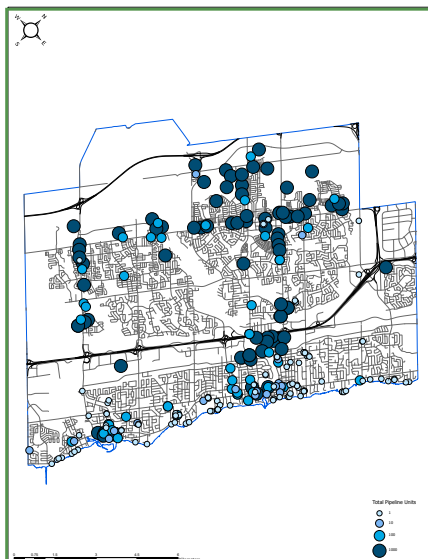
### Upcoming Growth in Halton Hills



### Upcoming Growth in Milton



### Upcoming Growth in Oakville



These heat maps show pipeline units that are actively under review (does not include those under appeal). This data often reflects full build-out which is expected to occur in phases over a longer time horizon. As a result, these areas rely on ongoing coordination with Local Municipalities to understand phasing and prioritization to ensure infrastructure needs and timing are appropriately aligned.

# Part 2 | Water and Wastewater Servicing Capacity

---

## 2.1 | 2026 Water and Wastewater System Capacity Status

A system capacity analysis evaluates the ability of Regional water and wastewater trunk and treatment infrastructure to accommodate new growth overall. It considers recorded daily water and wastewater flows at treatment plants, and an on-going review of how development is progressing through the pipeline to building permit compared to projected growth under Joint Best Planning Estimates (JBPEs). This combination of data is used to confirm available capacity in Halton's water and wastewater systems, which then informs reviews at a site-specific level.

The most recent comprehensive system capacity review of Halton's water and wastewater system confirmed that sufficient capacity exists to support Local Municipal housing pledges to 2031. This review accounted for infrastructure that is currently in place, and capacity is expected to expand as infrastructure under construction comes into service prior to 2031.



While the system as a whole has the capacity to meet the housing pledge targets, where the units are built matters. There may be localized constraints related to pumping stations and trunk infrastructure in certain areas. Halton continues to work closely with Local Municipalities to prioritize infrastructure investments that align with local growth priorities and support the timely delivery of housing.

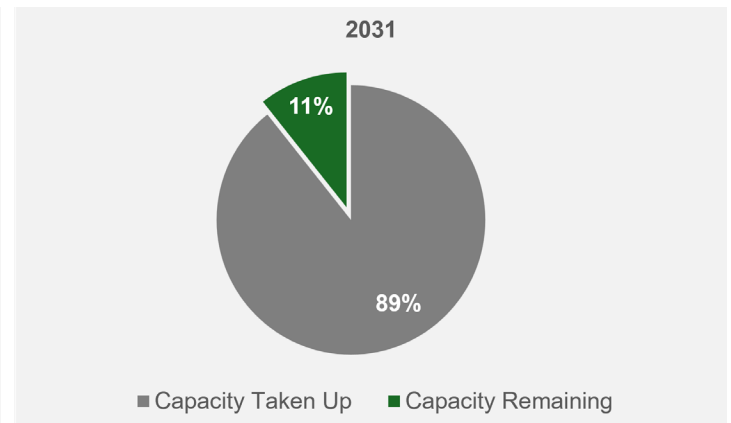
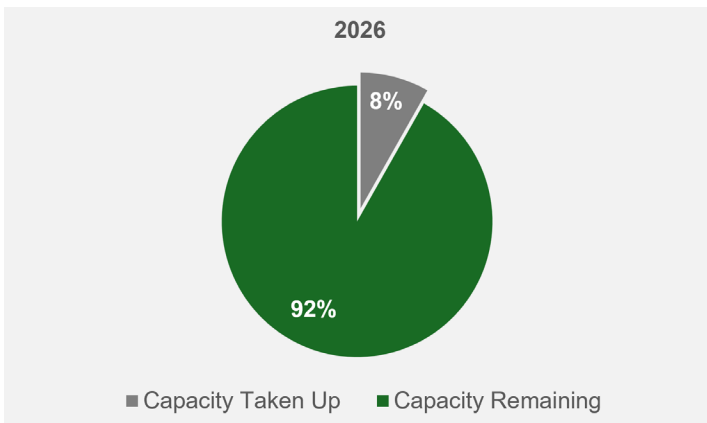
# Part 2 | Water and Wastewater Servicing Capacity



Monitoring actual system uptake against upcoming development activity distinguishes between structural capacity constraints and timing-related factors that influence growth delivery. This understanding is critical to support flexible, data-informed servicing decisions and to ensure that Regional infrastructure is available as development proceeds.

The high-level analysis outlined below indicates that the system has sufficient capacity to accommodate upcoming growth is well positioned to support additional growth currently at various stages of the development pipeline once market conditions improve and housing construction accelerates.

## Water / Wastewater: Current System Capacity Monitoring



The chart above is an illustration of system-wide servicing capacity based on current infrastructure, compared to realized and upcoming growth coming through the development pipeline. “2026” depicts what remains as available servicing since the system capacity review was conducted in 2023. (2023 capacity less the units that have taken up capacity by year-end 2025). “2031” estimates the remaining servicing capacity based on current infrastructure and upcoming growth by the end of 2031 (2026 capacity less pipeline units under active review, already approved or with building permit). As new infrastructure is constructed and brought into service, overall system capacity will increase and will address any localized constraints.

This comparison does not include location-specific considerations; is based on current infrastructure already in service; and is based on pipeline unit data as provided by Local Municipalities which may include full-buildout scenarios (does not assume any post-2031 phasing).

# Part 2 | Water and Wastewater Servicing Capacity

## 2.2 | Status of Infrastructure Delivery

The availability of additional water and wastewater servicing capacity is dependent on the delivery of the next wave of infrastructure projects. The following list outlines infrastructure investments that have been initiated and that will add location-specific servicing capacity to the system over the coming years.

### Burloak Water Treatment Plant Expansion

- Stage: Design
- Target in service date: 2031
- 110 ML/d capacity expansion to support growth in the Region

### Mid-Halton Wastewater Treatment Plant Expansion

- Stage: Environmental Assessment
- Target in service date: 2031
- 70 ML/d capacity expansion to support growth in the Region

### Lower Base Line Wastewater Pumping Station

- Stage: Environmental Assessment
- Target in service date: 2030
- 3,200 L/s wastewater pumping station to support growth in Milton and Halton Hills

### Aldershot Water Servicing

- Stage: Environmental Assessment
- Target in service date: 2031
- Support growth and resiliency in the Community of Aldershot

### North Aldershot Water Servicing

- Stage: Environmental Assessment
- Target in service date: 2031
- Support growth and resiliency in North Aldershot

### Burloak Booster Pumping Station and Transmission Mains

- Stage: Design
- Target in service date: 2030
- Support growth and system resiliency in the Region

### Trafalgar and Agerton Watermains

- Stage: Design
- Target in service date: 2028
- Support growth in the Trafalgar Secondary Plan Area

### Southeast Georgetown Wastewater Pumping Station

- Stage: Environmental Assessment
- Target in service date: 2031
- 35L/s wastewater pumping station to support growth in Southeast Georgetown

### Fourth Line, Fifth Line and Sixth Line Watermains

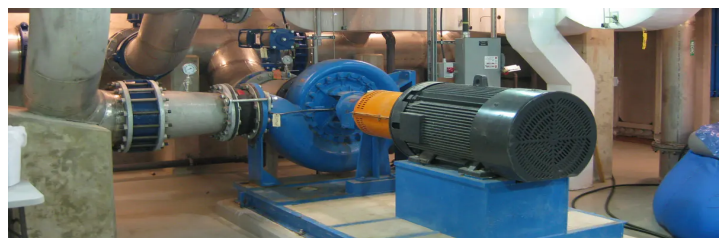
- Stage: Design
- Target in service date: 2030
- Support growth in the Britannia Secondary Plan Area

### Tremaine Road Wastewater Mains

- Stage: Design
- Target in service date: 2030
- Support growth in the Milton Education Village Secondary Plan Area

### Fourth Line, Fifth Line and Sixth Line Wastewater Mains

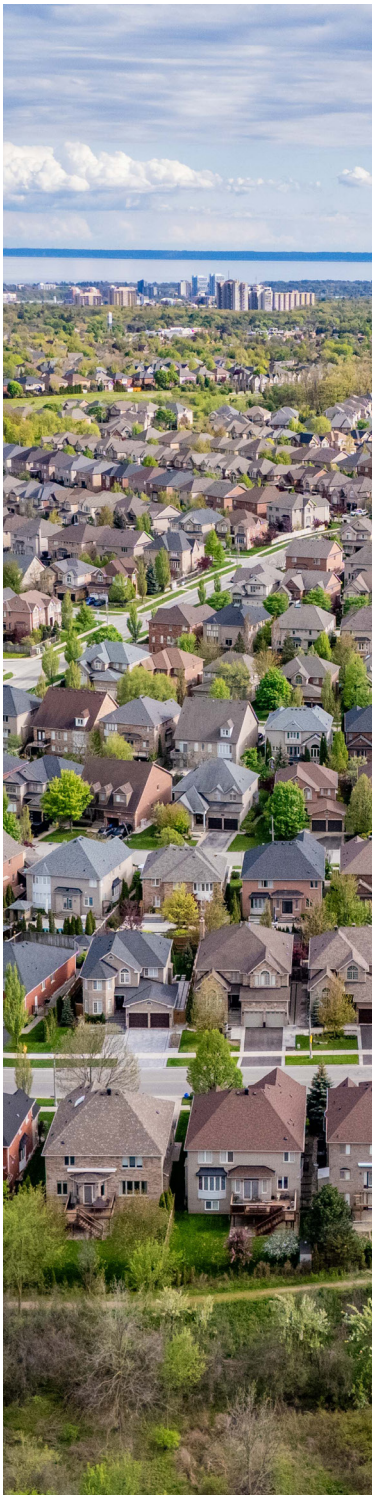
- Stage: Design
- Target in service date: 2030
- Support growth in the Britannia Secondary Plan Area



# Part 3 | Allocation Program Monitoring

## 3.1 | Allocation Program Status Update

There are three active Allocation Programs that support growth in the DGAs: the 2012, 2020 and 2023 Allocation Programs. The following sections provide an update on how secured allocations are progressing through the development process to building permit, which represents the completion of the municipal role in advancing housing.



### 2012 Allocation Program – Current Status as of March 2026

As shown in the table below, 92 percent of the SDEs have advanced through to building permit. The remaining SDEs in the 2012 Allocation Program are expected to advance through development applications that rely on SDEs from the 2020 and 2023 Allocation Programs to supplement or complete their developments.

**Allocation Summary - 2012 Program (Current Status as of March 2026)**

Local Municipality	SDEs Reserved	SDEs With Development Application	SDEs Without Development Application	SDEs Registered/ Building Permit
Burlington	12	0	12	0
Milton	8,618	490	269	7,859
Oakville	5,881	360	2	5,519
<b>Total</b>	<b>14,511</b>	<b>850</b>	<b>283</b>	<b>13,378</b>
<b>Per cent of Total</b>		<b>6%</b>	<b>2%</b>	<b>92%</b>

### 2020 Allocation Program – Current Status as of March 2026

As outlined in the table below, 53 percent of the 2020 Allocation program are underway with a development application and 26 percent have progressed to building permit.

**Allocation Summary - 2020 Program (Current Status as of March 2026)**

Local Municipality	SDEs Reserved	SDEs With Development Application	SDEs Without Development Application	SDEs Registered/ Building Permit
Burlington	495	495	0	0
Halton Hills	3,000	1,802	1,198	0
Milton	8,345	4,324	2,313	1,708
Oakville	8,882	4,317	858	3,707
<b>Total</b>	<b>20,722</b>	<b>10,938</b>	<b>4,369</b>	<b>5,415</b>
<b>Per cent of Total</b>		<b>53%</b>	<b>21%</b>	<b>26%</b>

# Part 3 | Allocation Program Monitoring

## 2023 Allocation Program – Current Status as of March 2026

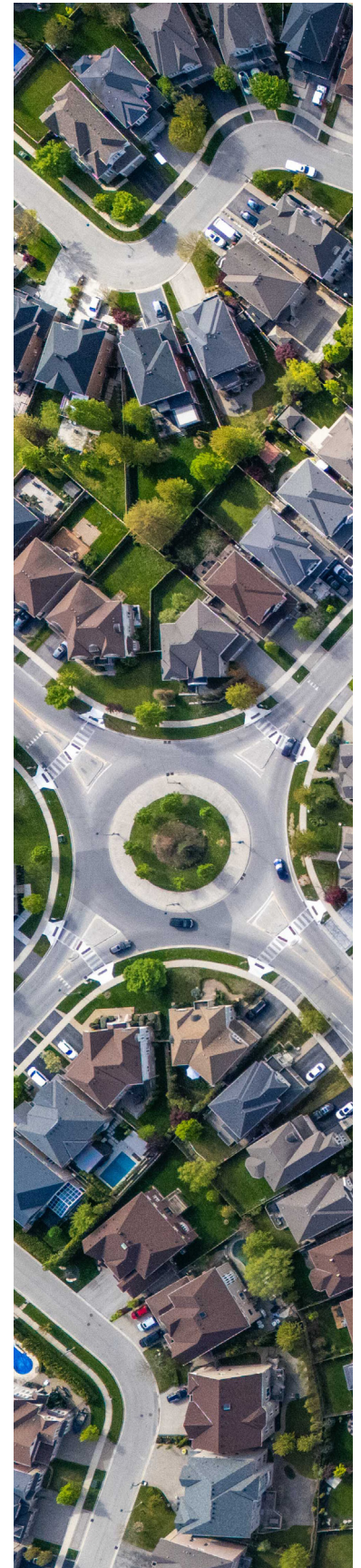
As outlined in the table below, since the launch of the program in May 2024, 42 percent of the SDEs and 12 percent of the IDUs are underway with a development application.

**2023 Allocation Program Summary (SDEs)**

Local Municipality	SDEs Reserved	SDEs With Development Application	SDEs Without Development Application	SDEs Registered/ Building Permit
Burlington	1,930	1,449	481	0
Halton Hills	1,371	597	774	0
Milton	5,042	1,396	3,646	0
Oakville	4,731	2,113	2,618	0
<b>Total</b>	<b>13,074</b>	<b>5,555</b>	<b>7,519</b>	<b>0</b>
<b>Per cent of Total</b>		<b>42%</b>	<b>58%</b>	<b>0%</b>

**2023 Allocation Program Summary (IDUs)**

Local Municipality	IDUs Reserved	IDUs With Development Application	IDUs Without Development Application	IDUs Registered/ Building Permit
Burlington	1,254	0	1,254	n/a
Halton Hills	0	0	0	n/a
Milton	5,194	481	4,713	n/a
Oakville	4,071	734	3,337	n/a
<b>Total</b>	<b>10,519</b>	<b>1,215</b>	<b>9,304</b>	<b>n/a</b>
<b>Per cent of Total</b>		<b>12%</b>	<b>88%</b>	<b>n/a</b>



# Part 3 | Allocation Program Monitoring

## 3.2 | Developer Interest Survey Results



A landowner survey was opened in April 2026 to eligible program participants to confirm interest in converting IDUs to SDEs under the 2023 Program and to identify interest in minor top-ups to complete current phases under the 2020 Program.

The table and map summarize participant interest in securing servicing capacity for IDUs. There were no submissions requesting 2020 Allocation Program top-ups this year.

For 2026, each Local Municipality has a limited amount of remaining available capacity to assign to requests. Requests not approved may be resubmitted through a future EGM process.

### SDEs Requested through Survey by Local Municipality

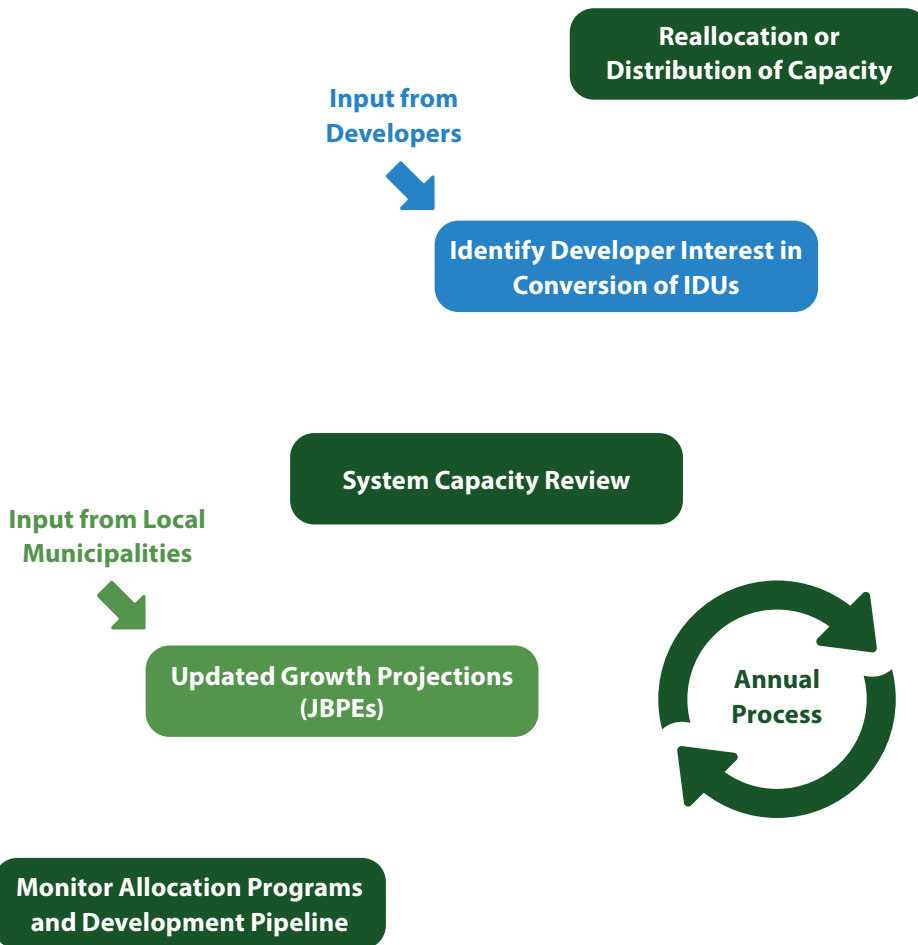
Local Municipality	IDUs Requested for Conversion to SDE
Burlington	0
Halton Hills	0
Milton	908
Oakville	1,134
<b>Total</b>	<b>2,042</b>

# Conclusion and Next Steps

Halton Region continues to be one of the fastest growing regions in Ontario. The Region maintains long-term infrastructure plans to ensure infrastructure is available to support planned growth in an informed and responsive manner.

The annual Enhanced Growth Monitoring process provides a transparent and consistent approach to planning for and distributing servicing capacity throughout the Region.

It is an annual cycle beginning with reviewing growth projections against actual development progression, allowing for informed review of planned vs. actual servicing capacity uptake. This process reinforces a data-driven approach to managing growth in a sustainable and coordinated manner.



This report provides an annual snapshot of a multi-stage process of data collection, monitoring, and analysis conducted throughout the year.

