

Canada Residential Real Estate - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

Canada Residential Real Estate Market Analysis

The Canada residential real estate market size stood at USD 38.55 billion in 2025 and is forecast to expand to USD 48.99 billion by 2030, advancing at a 4.91% CAGR. A surge in immigration, combined with funding that favors purpose-built rental developments, is lifting demand faster than new supply in several provinces. Technology-led construction methods such as modular and mass-timber mid-rises are shortening build times, while institutional investors channel more capital into rental formats to secure steady cash flows. Alberta is capturing migrants priced out of Ontario and British Columbia, and regulatory changes-chieflly possible adjustments to the mortgage stress test-could widen mortgage access and revive purchase activity. Ongoing cost inflation in materials, labor, and insurance tempers near-term profits, yet large players are countering through scale efficiencies and digital property-management tools.

Canada Residential Real Estate Market Trends and Insights

Immigration-fuelled household formation outpacing supply

Canada's population crossed 40 million in 2024, and newcomers continue to push annual household formation beyond the current construction pace, especially in Ontario and British Columbia. Intensifying demand spills into Alberta as 18,400 young workers relocated there in 2024, easing-but not eliminating-pressure on traditional gateways. Although recent caps on temporary residents modestly reduce inflows, the federal target of 485,000 permanent residents in 2025 underpins sustained demand. This

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demographic momentum is reinforcing price upside and attracting institutional equity seeking a hedge against inflation. At the same time, affordability gaps widen, prompting government subsidies aimed at first-time buyers.

Federal and provincial funding for purpose-built rentals

Ottawa's USD 15 billion Apartment Construction Loan Program and the USD 4.4 billion Housing Accelerator Fund collectively increase capital access and accelerate municipal approvals. Provincial action amplifies results: Quebec's incentive package boosted rental housing starts 30% in 2024. These supply-side programs move beyond earlier demand-side subsidies, prompting developers to pivot toward long-term rental income over one-time sales. The structural shift is visible in 35% of completions now being purpose-built rentals, the highest ratio since 1992.

Build-cost inflation from skilled-labor shortages

Construction costs are 51% above pre-pandemic levels, eroding pro formas and forcing schedule extensions. Retirements outpace apprentice entries, and immigration policies still emphasize knowledge-based talent rather than trades. In response, Ottawa introduced 55-year insured construction loans, but developers in Ontario and British Columbia still cite labor scarcity as their biggest barrier to breaking ground. Alberta benefits from a more mobile workforce that tempers wage spikes, yet national supply chains for steel and glazing remain tight, keeping material costs elevated.

Other drivers and restraints analyzed in the detailed report include:

Modular & mass-timber mid-rises compressing build cycles / Institutional shift to single-family rental portfolios / OSFI mortgage stress-test tightening /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Apartments command 55% of the Canada residential real estate market in 2024 and are forecast to post a 5.06% CAGR to 2030. Developers gravitate to multifamily because CMHC's insured debt lowers equity requirements, while municipal up-zoning away from single-family exclusivity supports higher-density formats.

Strong institutional appetite anchors this trend. REITs pursue purpose-built rentals that meet ESG mandates and match long-duration liabilities. Modular construction and mass-timber systems shorten delivery cycles, partially offsetting land-price inflation in core markets. Detached-home builders concentrate on outlying suburbs where land costs remain manageable, but the value proposition rests on commute tolerance and fewer transit options.

Mid-market units represented 52% of the Canada residential real estate market share in 2024, yet affordable housing is projected to be the fastest-growing slice at 5.16% CAGR. Government policy now ties infrastructure grants to municipal progress on affordability, pushing cities to expedite approvals for below-market rents.

Developers secure tax abatements and density bonuses by designating 20%-30% of units as affordable, improving blended project returns. Institutional investors, mindful of social-impact mandates, view affordable housing as a hedge against cyclical downturns because waitlists provide durable occupancy. Luxury products still attract foreign buyers in niche areas, but higher transfer taxes and vacancy levies cap speculative momentum.

The Canada Residential Real Estate Market is Segmented by Property Type (Apartments & Condominiums and Villas & Landed

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Houses), Price Band (Affordable, Mid-Market and Luxury), Mode of Sale (Primary and Secondary), Business Model (Sales and Rental) and Region/Province (Ontario, Quebec, British Columbia, Alberta and Rest of Canada). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Brookfield Asset Management / CAPREIT / Tridel Group / Mattamy Homes / QuadReal Property Group / Dream Unlimited Corp. / Killam Apartment REIT / Boardwalk REIT / Oxford Properties Group / Minto Group / Canderel / Concord Pacific Developments / Ivanhoe Cambridge / Great Gulf Group / Chartwell Retirement Residences / Timbercreek Asset Management / Allied Properties REIT / Intracorp Canada /

Additional Benefits:

The market estimate (ME) sheet in Excel format /
3 months of analyst support /

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