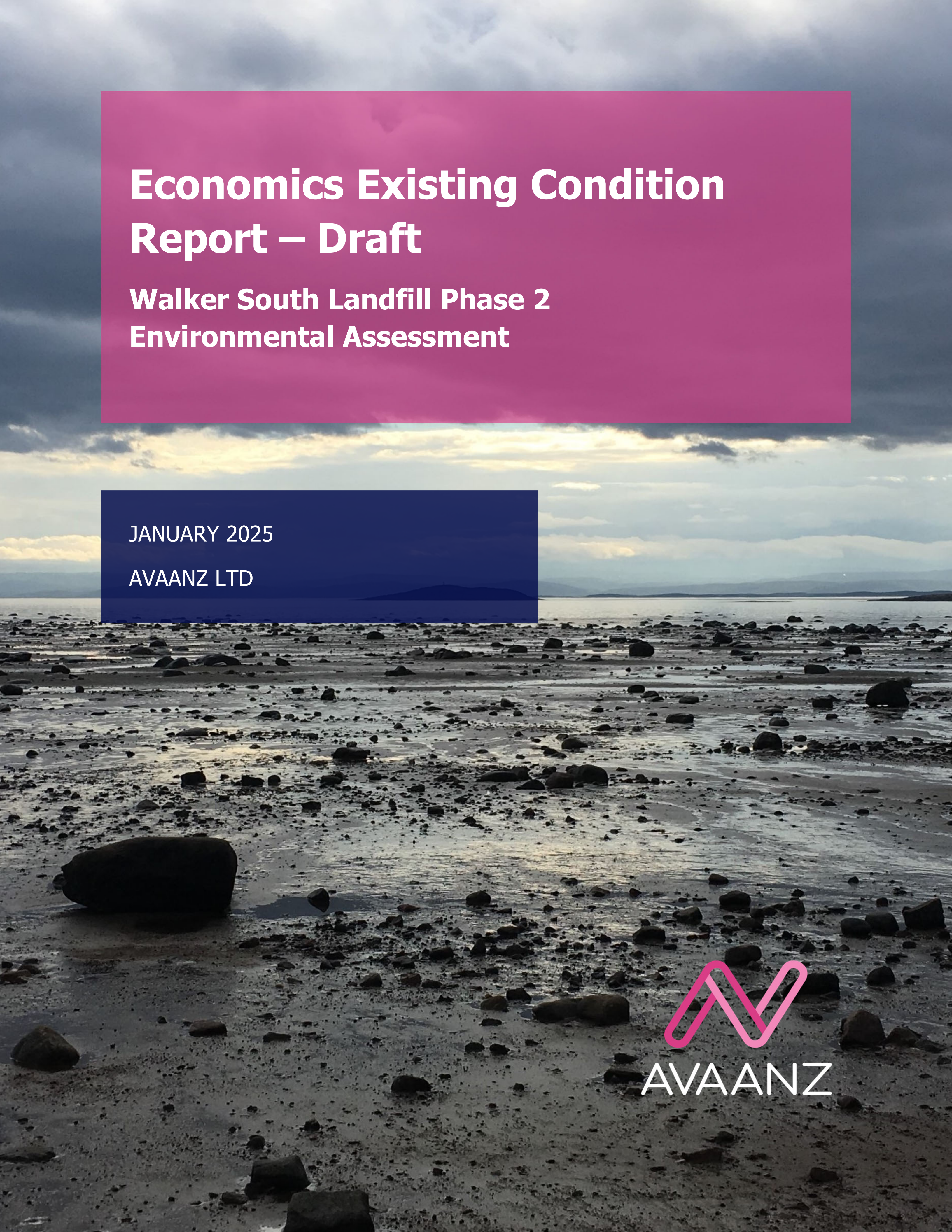

Economics Existing Condition Report – Draft

Walker South Landfill Phase 2 Environmental Assessment

JANUARY 2025

AVAANZ LTD

Economics Existing Condition Report – Draft

Walker South Landfill Phase 2 Environmental Assessment

PREPARED FOR:

Walker Environmental Group
2800 Thorold Townline Rd.
Niagara Falls, L2E 6S4 Ontario

PREPARED BY:

AVAANZ

9 Cavell Avenue
Guelph, ON N1H 1Y4 Canada
www.avaanz.ca

AVAANZ
9 Cavell Avenue
Guelph, ON N1H 1Y4
www.avaanz.ca

January 24, 2025

Mr. Darren Fry
Walker Industries Ltd.
2800 Thorold Townline Rd,
Niagara Falls, ON L2E 6S4

Dear Mr. Darren Fry:

On behalf of Avaanz Ltd., we are pleased to submit the following Report titled: Economics Existing Condition Report – Draft, Walker South Landfill Phase 2 Environmental Assessment.

Sincerely,
Avaanz Ltd.

Angus Keir
Principal
Avaanz Ltd.

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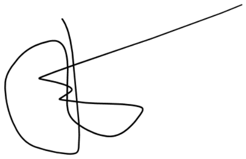
Report Prepared By

Angus Keir,
Principal

Report Reviewed By



JME Maxwell,
Principal

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1. Introduction

This report provides an overview of the existing economic conditions within the study areas for the South Landfill Phase 2 Environmental Assessment (EA). The Minister of the Environment, Conservation and Parks (Minister) Approved Terms of Reference (ToR) for the EA included a preliminary description of the existing environmental conditions and made a commitment to expand upon this description during the EA[1].

Walker Environmental Group (Walker) initiated a Comprehensive EA under the Ontario EA Act seeking approval to expand the capacity of its existing South Landfill located at the Walker Resource Management Campus (Campus) in Niagara Falls. The South Landfill is an essential component of Walker's Campus since it began operating in 2009 under Environmental Compliance Approval (ECA) No. 008-78RKAM, as amended, and provides safe, reliable, and affordable disposal capacity for solid, non-hazardous waste from residential and industrial, commercial, and institutional (IC&I) sources to its customer base within the City of Niagara Falls, the Regional Municipality of Niagara, and the Province of Ontario. The South Landfill's total approved disposal capacity is 17.7 million m^3 and is expected to reach maximum capacity by 2029 to 2031.

The proposed Phase 2 of the South Landfill would extend its approved capacity by approximately 18 million m^3 over a 20-year period, ensuring Walker can continue to provide essential residual waste disposal services to its existing customer base. Walker is proposing to locate the additional disposal capacity (Phase 2) to the east of the existing South Landfill within the area currently occupied by Walker's Southeast Quarry. The proposal would maintain the existing landfill service area, as well as the annual volume of solid, non-hazardous waste from the sources currently accepted.

The EA Act requires that proponents describe the environment that may potentially be affected or may reasonably be expected to be affected, directly or indirectly, by the Alternative Methods of Carrying Out the Undertaking (Alternative Methods) proposed as part of an EA. The description of the existing environmental conditions will provide the baseline for the assessment of potential effects for the proposed Undertaking, which will be conducted during the EA. This report focuses on characterizing the existing conditions within the study areas for the South Landfill Phase 2 EA for economics.

1. A more detailed description of the environment will be provided during preparation of the South Landfill Phase 2 EA reflecting the final study area using available existing information sources and investigative studies.

2. Study Areas

From an economic perspective, the characterization of existing conditions within the study areas described below are appropriate to this EA.

Local Study Area (LSA)

There are two distinct LSAs used for the study. The LSA used for all indicators with the exception of property value and business impacts is the four lower tier municipalities within proximity of the proposed landfill expansion site, including:

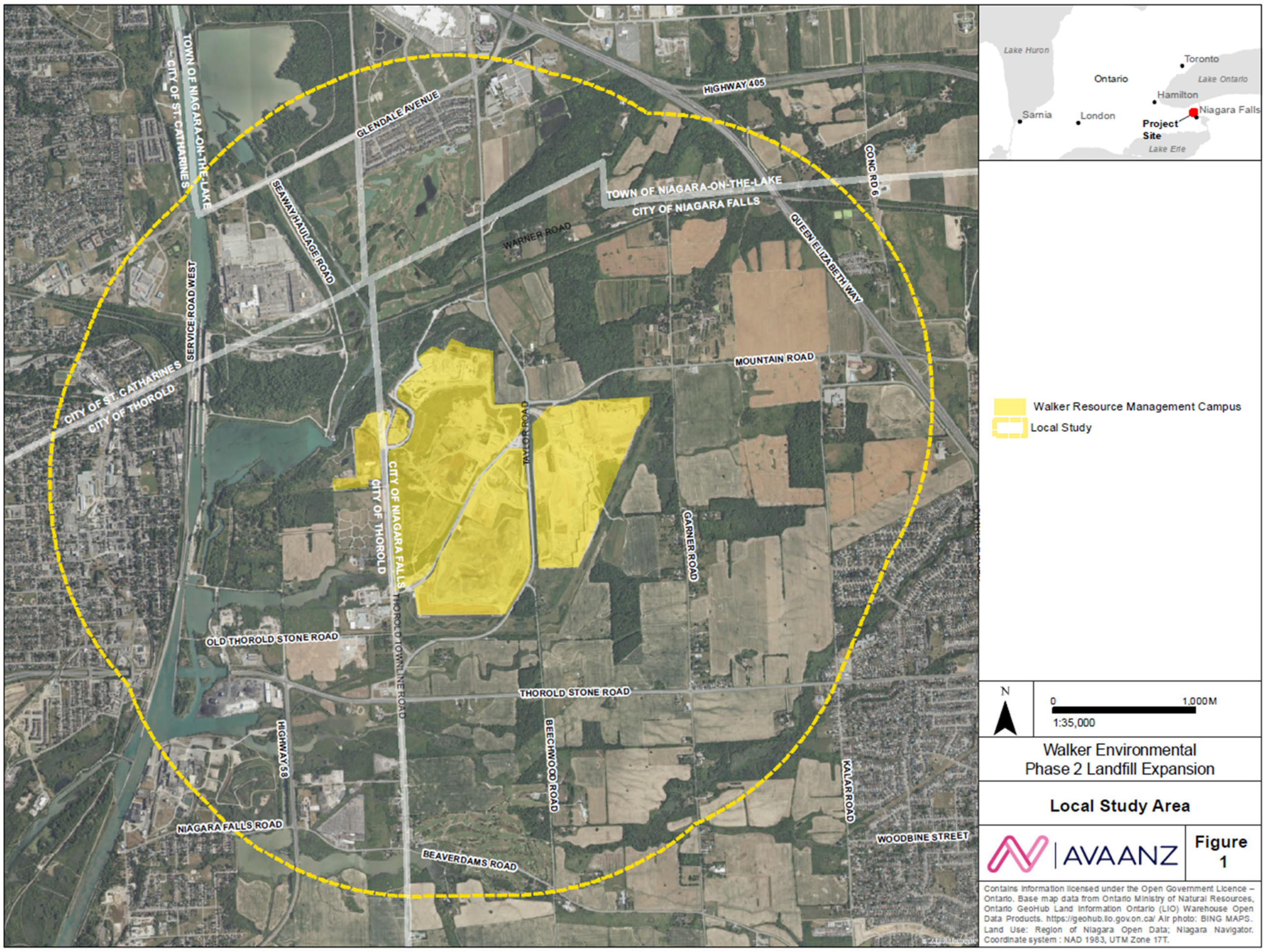
- City of Niagara Falls;
- Town of Niagara-on-the-Lake;
- City of St. Catherines; and
- City of Thorold.

The LSA for measurement of property value and business impacts is limited to the 2-kilometre radius around the boundaries of the Walker Campus (**Figure 1**).

Regional Study Area (RSA)

The RSA encompasses Niagara Region. For evaluation of public finance, the RSA is the Regional Municipality of Niagara.

Figure 1: LSA 2-Kilometre Radius Around Walker Campus



Rationale for Study Area Selection

The selection of study areas is based on rational and geographic considerations, designed to capture the varying degrees of potential impacts from the proposed project on the criteria local economy, real estate, public finance, and customer costs. Each study area reflects the spatial scope within which specific effects may take place, ensuring a comprehensive assessment while maintaining a targeted focus. The rationale for selection of the LSA and RSA study areas is described in the following paragraphs.

The LSA encompasses the lower tier municipalities within proximity of the Walker Campus. This area is for understanding how the project might affect nearby communities. The inclusion of City of Niagara Falls, Town of Niagara-on-the-Lake, City of St. Catherines, and City of Thorold ensures that impacts to the local economy and public finance impacts are assessed in the jurisdictions likely to be affected by the project.

For the assessment of property values and business impact indicators within vicinity of the site the LSA is restricted to the 2-kilometre radius of the Walker Campus. This is the area within which there is the greatest potential for nuisance effects such as dust, odour, and noise from the project which may have a detrimental impact on property values and business activity within vicinity of the site.

The RSA encompasses the Region of Niagara. With regards to the assessment of criteria of the local economy, real estate, and cost to customers the broader market influences within the Region will be considered. For evaluation of public finance, the RSA is the Regional Municipality of Niagara.

3. Methodology

This section provides a description of the methodology used to characterize economics existing condition. The methodology undertaken is organized by topic in the text that follows.

3.1 Local Economy

3.1.1 Labour Force

Labour Force Characteristics

Resident labour force characteristics data for the LSA (including individual communities) and RSA were collected from the most recent, 2021, Census of the Population from Statistics Canada (2023a). Labour force characteristics data presented within the report includes population 15 years and over, population in the labour force, participation rate, employed, unemployed, and unemployment rate. The apportionment of the labour force in the LSA was moreover calculated. Trends regarding changes in employed residents between 2016 and 2021 were also calculated via comparing data from the most recent (2021) census with the 2016 census (Statistics Canada, 2017). More recent trends regarding labour force characteristics data available from Statistics Canada for St. Catherines – Niagara Census CMA was also analysed (2024a).

Occupations

Jobs occupation data were collected for the LSA and RSA at the 1-digit National Occupational Classification (NOC) level from Lightcast (2024a). Analysis undertaken using this data includes: distribution of total jobs by study area; identification of top occupations; highest and lowest paying occupations; changes in jobs by occupation over the period 2018 to 2023; and total jobs growth trends over period 2011 to 2023.

Commuting Flows

2021 commuting flow data from geography of residence to geography of work was obtained from Statistics Canada for the LSA and RSA (2022a) (2022b). This data was analysed to determine labour mobility trends within and amongst the study areas.

3.1.2 Businesses

Walker

Information regarding business activities at Walker Campus were obtained from information provided on the company website (Walker, 2024a) (Walker, 2023).

Business Inventory

An inventory of businesses within a 2000 metre radius of the perimeter of Walker Campus was collected using the Niagara business directory (Niagara Economic Development, 2024a), 2022 Niagara Region Employment Inventory (Docker, 2023), and Google Maps (2024). The Niagara business directory and employment inventory was used to gather information regarding businesses including name, street address, website, industry sector, and employee size. Google Maps was used to confirm businesses listed under the directory and employment inventory were still present as of December 2024 and to collect business name, address details, and website information for any newly discovered businesses.

Businesses were identified according four geographical zones of interest:

- 500m radius from the boundaries of the proposed landfill expansion site (76.12 ha of Southeast Quarry);
- 500m-1000m radius from the boundaries of the proposed landfill expansion site;
- 1000m-2000m radius from the boundaries of the proposed landfill expansion site;
- The area between 2000m radius of the proposed expansion site and 2000m radius of the entire Walker Campus.

Any business that was located on property that was bifurcated by a zone of interest radius line, was counted within the zone of closest proximity. Names and addresses of businesses within the described geographical zones are available in **Appendix A** of this report.

Details regarding the number and types of businesses present within the Outlet Collection at Niagara just outside the 2000m radius boundary for the LSA were also collected using the mall's directory (Outlet Collection at Niagara, 2024).

Business Counts

Business counts by number of employees were collected for the LSA and RSA from Lightcast (2024b). Analysis undertaken using this data includes distribution of businesses with employees within the LSA and distribution of business by size.

Major Employers

Major employers within the LSA and RSA were identified using data obtained from Niagara Economic Development (2024b).

3.1.3 Industry

Jobs by industry, average wages, and sales data for the LSA and RSA were collected at the 2-digit North American Industry Classification System (NAICS) level from Lightcast (2024c) (2024d). Analysis undertaken using this data includes: identification of top industries; changes over the period 2018 to 2023; highest and lowest paying industries; distribution of total industry sales by study area; and total industry sales growth trends over period 2011 to 2023.

In addition the above, tourism and farm industry data was also collected for the LSA and RSA at the 4-digit NAICS level from Lightcast (2024c) (2024d) and similar analysis was performed regarding these specific industry sectors.

3.1.4 Gross Domestic Product (GDP)

Contributions to GDP associated with Walker's operation of the South Landfill and ancillary activities on campus that likely would not exist without the expansion were obtained from an unpublished report by Avaanz for Walker (2022) and updated to 2023 dollars using Statistics Canada consumer price index (CPI) data (2024c).

2017 GDP at basic prices data for St. Catherines – Niagara Census Metropolitan Area (CMA) for years 2020-2023 was obtained from The Conference Board of Canada (2024). Total industry wages for the municipalities comprising the LSA and the CMA were obtained from Lightcast input-output model data (2024d). The distribution of total industry wages for each LSA municipality as a percentage of CMA total industry wages was calculated. The calculated percentage distribution from the preceding calculation was multiplied by the CMA GDP data in order to estimate GDP for each of the LSA municipalities. All GDP data was inflated to 2023 dollars using Statistics Canada (2024c) CPI data. GDP data was not available for Region of Niagara (RSA) and therefore GDP for the CMA is presented as a proxy. The CMA encompasses the majority of economic activity within the RSA excluding the municipalities of Grimsby and West Lincoln. Using the above methodology, 2023 GDP at basic prices for the LSA communities and CMA, and changes over the period 2020 and 2023 are described.

3.2 Real Estate

Residences were identified according three geographical zones:

- 500m radius from the boundaries of the proposed landfill expansion site (76.12 ha of Southeast Quarry);
- 500m-1000m radius from the boundaries of the proposed landfill expansion site;
- 1000m-2000m radius from the boundaries of the proposed landfill expansion site;

Any residence that was located on property that was bifurcated by a zone of interest radius line, was counted within the zone of closest proximity. Residences and properties within geographical zones were identified using SLR's Existing Social Environment Map (2023) in conjunction with land use mapping.

Information was collected from annual real estate market reports published by McGarr Realty Corp., a real estate brokerage based in Niagara Region (2019) (2020) (2021) (2022) (2023) (2024). The market reports make use of MLS® data for residential real estate. Our analysis focused on trends regarding key metrics related detached home sales within the LSA and RSA. The key metrics analysed include number of sales, cumulative days on market, and average sales price.

In addition to the above, Bank of Canada interest rates were tracked based on press releases over the period 2018 to 2024 (2018) (2020a) (2022) (2023) (2024a). Information regarding the impacts of rate changes on the housing market were collected from a variety of sources including reports from Statistics Canada (2021), the Canadian Real Estate Association (CREA) (2024), and news articles (Battistib, 2023).

3.3 Public Finance

Financial information for four LSA communities of Niagara Falls, Niagara-on-the-Lake, St. Catharines, Thorold, and the Regional Municipality of Niagara was obtained from the Financial Information Return (FIR) multi-year reports published by the Province of Ontario, Ministry of Municipal Affairs and Housing (MMAH) (2024a) (2024b) (2024c) (2024d) (2024e). To assess the financial health of the municipalities we focused on five key areas including: tax composition, revenues, financial stability, tangible capital assets, and environmental costs. Additionally, we also included a section describing Walker's usage of municipal sewer systems in relation to leachate discharge from the South Landfill.

With regards to tax base analysis, we examined the composition of the tax base according to residential, farmland and other. This demonstrates the strength of municipalities in the LSA and RSA municipal tax base. In the revenue section, we examined the own revenues and government transfers for the municipalities and the RSA.

To assess the financial stability of the LSA and the RSA we calculate the current ratio, which measures the ratio of current assets to current liabilities, a value greater than one indicates sufficient liquidity. We also calculate the Debt Service Coverage Ratio, which is a measure of a municipality's ability to service its debt payments. The target is a ratio greater than or equal to 2.

Then we showed the structure of the tangible capital assets, categorized as general, infrastructure and construction-in-progress. We also examine how well each area is maintaining its infrastructure by showing the asset sustainability ratio, which shows how effectively a municipality/region is replacing or renewing its assets as they reach the end of their useful lives. The target ratio is greater than 90%, if the value is below this, it means the infrastructure may not be properly maintained/replaced. This helps evaluate whether the municipality/region is making sufficient investments to sustain its infrastructure. Lastly, in the environmental services cost section, we focus on the portion of total operating expenses that goes toward environmental services.

3.4 Waste Disposal Services

Information regarding Ontario's reliance on disposal rather diversion activities were obtained from Statistics Canada's Waste Management Survey (2024b) (2024d), and a study on IC&I waste diversion by AET Group Inc. (2021).

Historical trends of tonnage waste disposed in Ontario by sector, residential and IC&I, were obtained from AMO's Baseline Waste & Recycling Report as well as Ontario waste exports to the

US by State (2023). Data regarding Ontario waste exports to Michigan was moreover, supplemented with more up-to-date information from the State of Michigan, Department of Environment, Great Lakes, and Energy most recent annual report of solid waste landfilled (Roos, 2024).

Projections of landfill capacity depletion in Ontario and increasing reliance of municipalities on private landfills are based on data obtained Ontario Waste Management Association's 2021 landfill report (2021).

With regards to the RSA, details local operational landfills, capacity and fill rates were obtained from Niagara Region's Public Drop Off and Disposal System Review (2023); GHD's report on the current state of waste management in Niagara Region (2024); Walker (2024c); and Province of Ontario Ministry of the Environment, Conservation and Parks (2021a) (2021b).

Details regarding Niagara Region's partnership with Walker to support it's waste management needs were also obtained from the Niagara Region's Public Drop Off and Disposal System Review and the GHD report.

Demand for waste treatment and disposal services in the LSA and RSA was obtained from Lightcast Regional Requirements data, including the proportion of demand met in-region and out-of-region (2024e).

Information regarding tipping fees at public drop-off facilities within Niagara Region, the Greater Toronto and Hamilton Area (GTHA), Southwestern Ontario were obtained from Niagara Region's Waste Management Steering Planning Committee (Prpic, 2024) supplemented with information provided on municipal websites (City of Toronto, 2024) (Region of Durham, 2024) (York Region, 2023). Walker's publicly disclosed tip fee was similarly obtained from it's website (Walker, 2024b). Average public tip fees for Michigan, New York and Ohio were obtained from the Environmental Research & Education Foundation (EREF, 2024) and converted to Canadian dollars using Bank of Canada exchange rates (Bank of Canada, 2024b). Bulk volume landfill tipping rates for ICI mixed waste in Canada were obtained from AET Group Inc. (2021) and converted in 2024 dollars using Statistics Canada CPI data (2024c).

The current rate for long-haul of mixed waste in Ontario was collected from engagement (2024b). Alternative private landfill distances and travel time from Walker's South Landfill were obtained using Google Maps (2024).

3.5 Data Collection

Table 1 provides an overview of all information sources used for the development of this report organized by topic.

Table 1: Information Sources

Topic	Data	Information Source
Local Economy	GDP	• The Conference Board of Canada – Major City Insights
	Labour Force Characteristics	• Statistics Canada – Census Profiles • Statistics Canada – Table – Labour Force Characteristics, Annual
	Occupations	• Lightcast – Occupation Table
	Commuting Flows	• Statistics Canada – Commuting Flow from Geography of Residence to Geography of Work
	Business Inventory	• Niagara Economic Development – Niagara Business Directory • Niagara Region Employment Inventory • Outlet Collection at Niagara – Directory • Google Maps
	Business Counts	• Lightcast – Industries by Business Location Size
	Major Employers	• Niagara Economic Development website
	Industry	• Lightcast – Industry Table • Lightcast – Regional Jobs, Wages, Sales • Niagara Economic Development Reports
Real Estate	Residences within proximity of site	• SLR – Existing Social Environment Map • Land Use parcel mapping
	Sales, Cumulative Days on Market, Average Sales Price	• Annual Real Estate Market Reports
	Interest Rates and Impacts	• Bank of Canada Press Releases • Statistics Canada – Analysis – Trends in the Canadian mortgage market • Canadian Real Estate Association News Releases
Municipal Finance	Tax Base, Revenue, Financial Stability (current ratio and Debt Service Coverage Ratio), Tangible Capital Assets, Environmental Services Costs	• Province of Ontario, Ministry of Municipal Affairs and Housing – Multi-Year Financial Information Return Review for Niagara Falls, Niagara-on-the-Lake, St. Catharines, Thorold, and Niagara Region
Waste Disposal Services	State of Waste Disposal - Ontario	• Statistics Canada – Waste Management Survey – Waste Disposal and Waste Diverted Tables • AET Group Inc. – IC&I Waste Diversion Report • AMO – Ontario Baseline Waste & Recycling Report • State of Michigan – Annual Report of Solid Waste Landfilled in Michigan

Topic	Data	Information Source
		• Ontario Waste Management Association – State of Waste in Ontario: Landfill Report
	RSA Landfills	• Niagara Region – Public Drop Off and Disposal System Review • GHD – Current State Report: Waste Management Strategic Plan • Walker – Proposed Terms of Reference: Walker South Landfill Phase 2 • Province of Ontario – Landfill Site Details
	RSA Demand for Waste Treatment and Disposal	• Lightcast - Regional Requirements
	Tipping Fees and Waste Haulage Costs	• Niagara Region Waste Management Steering Planning Committee - 2025 Waste Management Tipping Fees • City of Toronto, Region of Durham, York Region, and Walker websites • EREF - Analysis of MSW Landfill Tipping Fees • AET Group Inc. – IC&I Waste Diversion Report • Avaanz – Feedback from Engagement • Google Maps – distances and driving time to alternative private landfills

3.6 Data Limitations

Financial Information

The financial information in this report is as of 2023 for all municipalities, except for Niagara Falls, which is based on 2022 data due to the availability of financial information return (FIR) data from the Ministry of Municipal Affairs and Housing (MMAH), Ontario. Comparisons involving Niagara Falls should be interpreted with caution, as the one-year difference may influence trends or insights.

Use of Proxy Data

In some instances, data from the St. Catharines–Niagara Census Metropolitan Area (CMA) has been used as a proxy for the RSA due to the unavailability of specific data for the Niagara Region. The CMA serves as a proxy for presenting more up-to-date information on regional labour force characteristics and gross domestic product (GDP) because it encompasses the majority of the RSA's population and economic activity, excluding only the municipalities of Grimsby and West Lincoln.

While the use of CMA proxy data helps to provide a comprehensive and timely analysis, readers should be mindful of its limitations and recognize that it may not fully capture the economic dynamics of areas outside the CMA but within the RSA.

Labour Force Characteristics

The 2021 resident labour force characteristics data presented in the Local Economy Section should be interpreted within the context of the COVID-19 pandemic, which was ongoing during that time. The pandemic, which began in early 2020, caused significant disruptions to labour markets across Canada, including within the LSA and RSA. Factors such as temporary business closures, public health restrictions, shifts to remote work, supply chain interruptions, and changes in consumer behavior likely had a substantial impact on the participation and unemployment rates reported for 2021.

When analyzing the labour force characteristics, particularly the participation and unemployment rates, as well as changes in employment between 2016 and 2021, these pandemic-related dynamics must be carefully considered. It is also important to recognize that labour market disruptions varied by community and sector, with certain areas and industries—such as tourism and hospitality—being disproportionately affected.

Moreover, broader labour market trends observed from 2021 to 2023 demonstrate a strong post-pandemic recovery in the St. Catharines–Niagara CMA, highlighting the temporary nature of some disruptions observed in 2021. These trends further emphasize the need for caution when interpreting 2021 labour force data without accounting for the extraordinary circumstances of the pandemic.

4. Characterization of the Existing Environment

4.1 Local Economy

This section provides a comprehensive analysis of the economic characteristics and contributions of the LSA and its connection to the broader RSA. It begins with an examination of the labour force, exploring employment patterns, occupational structures, workforce mobility. The section then turns to businesses, examining business activity within the vicinity of the proposed landfill expansion and analysing the distribution and size of enterprises within the LSA and RSA, highlighting major employers. The industry portion focuses on trends in job growth, wages, and sales, with attention to tourism and farms. Finally, the gross domestic product (GDP) segment evaluates the economic contributions of the LSA and RSA, emphasizing the importance of municipalities like St. Catharines and Niagara Falls, and examining Walker's role in supporting regional GDP through its operations and ancillary activities. Collectively, these components provide a detailed and holistic overview of the LSA's economic landscape, its role within the region.

4.1.1 Labour Force

This section examines the labour force characteristics of the LSA and its relationship to the broader RSA, focusing on employment patterns, occupational structures, and workforce mobility. The LSA in 2021 had a labour force of 133,600 people with a participation rate of 58.2% and an unemployment rate of 18.1%. The pandemic's effects, such as temporary business closures, public health restrictions, and shifts to remote work, likely contributed to the elevated unemployment rate and reduced labour force participation. Communities within the LSA exhibited varying labour force characteristics. Niagara Falls had a participation rate of 58.5% and the highest unemployment rate at 22.5%. Niagara-on-the-Lake showed the lowest participation rate (50.7%) and an unemployment rate of 15.0%, while St. Catharines and Thorold had participation rates of 58.4% and 61.8%, respectively, with unemployment rates of approximately 15%. Employment in the LSA decreased by 9.1% between 2016 and 2021, with Niagara Falls, Niagara-on-the-Lake, and St. Catharines seeing declines, while Thorold experienced a 9.9% increase.

In 2023, the LSA supported 138,720 jobs, concentrated primarily in sales and service occupations (32.2%), trades and transport (16.1%), and business, finance, and administration (14.8%). Job growth trends between 2018 and 2023 revealed increases in health (12.7%), natural/applied sciences (15.2%), and education-related occupations (5.4%), while sales (-14.1%), legislative and senior management (-20.5%), and natural resources-related jobs (-14.5%) declined.

The LSA contributed 60.3% of jobs in the RSA, which had a labour force of 233,555 in 2021. The RSA showed slightly higher participation (58.5%) and lower unemployment (15.5%) compared to the LSA. Employment in the RSA declined by 6.0% from 2016 to 2021, compared to a 9.1% decline in the LSA. Post-pandemic recovery trends revealed stronger resilience in the RSA, with a 12.4% job increase from 2020 to 2023, compared to 10.1% in the LSA. Most employed residents in both areas worked locally, with 77.9% of LSA residents and 84.0% of RSA residents working within their respective regions. Niagara Falls played a critical role as a regional employment hub, employing 24.6% of LSA residents and 16.8% of RSA residents.

4.1.1.1 LSA

Resident Labour Force Characteristics

Table 2 presents 2021 labour force characteristics for residents of the LSA by community. In 2021 the working-age population (aged 15+) in the total LSA was approximately 229,700 people. The apportionment of working-age population by community within the LSA was as follows:

- Niagara Falls 34.3%
- Niagara-on-the-Lake 7.1%
- St. Catharines 50.1%
- Thorold 8.5%

In 2021, the participation rate (i.e. persons in the labour force/ working-age population) for the LSA as a whole was 58.2%. The participation rates for Thorold, Niagara Falls, and St. Catharines fall within a similar range of 61.8% to 58.4% while the participation rate for Niagara-on-the-Lake was considerably lower at 50.7%.

In 2021, the unemployment rate (i.e. unemployed/ labour force) for the LSA as a whole was 18.1%. The unemployment rate amongst the communities of St. Catharines, Thorold and Niagara-on-the-Lake falls within a similar range of 15.8% to 15.0% while the unemployment rate of Niagara Falls stands out as materially higher at 22.5%.

Table 2: LSA Resident Labour Force Characteristics, 2021

Community	Population 15+	In Labour Force	Participation Rate	Employed	Unemployed	Unemployment Rate
Niagara Falls	78,810	46,120	58.5%	35,720	10,400	22.5%
Niagara-on-the-Lake	16,365	8,290	50.7%	7,050	1,240	15.0%
St. Catharines	115,005	67,120	58.4%	56,490	10,630	15.8%
Thorold	19,520	12,070	61.8%	10,220	1,850	15.3%
Total LSA	229,700	133,600	58.2%	109,480	24,120	18.1%

Source: (Statistics Canada, 2023a)

Table 3 presents the employed residents within the LSA by community in 2016 and 2021. Between 2016 and 2021, the LSA experienced a decrease in its employed resident labour force, with the total number of employed residents declining by 11,020, representing a 9.1% reduction. This overall decline in the LSA was not uniform across the constituent municipalities. Niagara Falls faced the most significant decrease in employed residents (-14.2%), followed by Niagara-on-the-Lake (-

11.9%) and St. Catharines (-8.3). In contrast, Thorold's employed resident labour force grew 9.9%. These figures highlight the varied employment dynamics within the LSA, with Thorold emerging as an exception, exhibiting employment growth amidst regional decline.

Table 3: LSA Employed Residents, 2016-2021

Community	2016	2021	Change	% Change
Niagara Falls	41,625	35,720	-5,905	-14.2%
Niagara-on-the-Lake	8,000	7,050	-950	-11.9%
St. Catharines	61,575	56,490	-5,085	-8.3%
Thorold	9,300	10,220	920	9.9%
Total LSA	120,500	109,480	-11,020	-9.1%

Source: (Statistics Canada, 2023a) (Statistics Canada, 2017)

Occupations

Table 4 provides an overview of jobs within the LSA by occupation and community based on the 1-digit National Occupational Classification[2] (NOC) for 2023. In total, the LSA supported approximately 138,720 jobs, with the majority concentrated in St. Catharines (50.4%) and Niagara Falls (32.1%), while Niagara-on-the-Lake and Thorold accounted for 10.2% and 7.3% of the jobs respectively.

The top five occupational categories, representing over 80% of all jobs in the LSA, were:

- Sales and service occupations 32.2%
- Trades, transport and equipment operators and related occupations 16.1%
- Business, finance and administration occupations 14.8%
- Occupations in education, law and social, community and government services 11.0%
- Health occupations 8.7%

[2] The National Occupational Classification (NOC) Canada is a classification of occupations designed primarily for use in statistical programs. It is also used for employment-related program administration and to compile, analyze and communicate information about occupations, such as labour market information

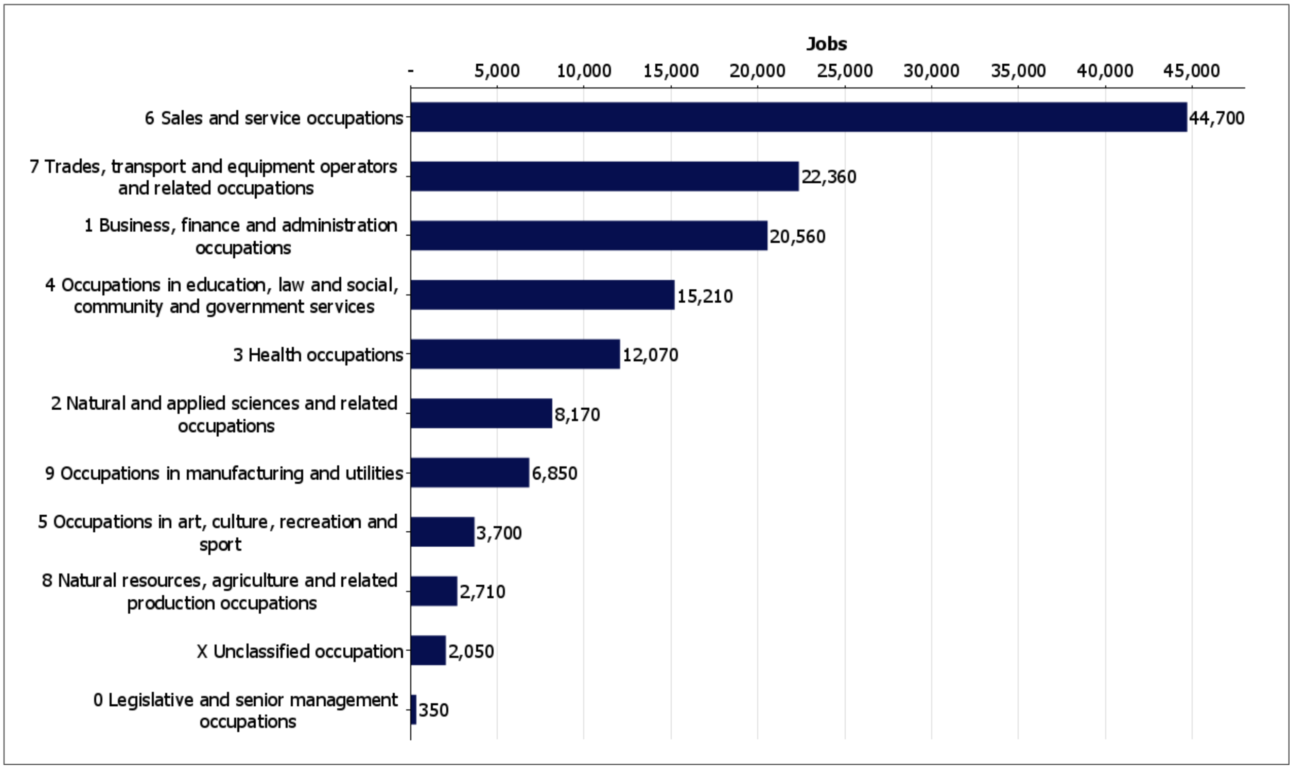
Table 4: LSA Jobs by Occupation, 1-Digit NOC, 2023

Occupation	Niagara Falls	Niagara-on-the-Lake	St. Catharines	Thorold	Total LSA
1 Business, finance and administration occupations	6,210	2,160	10,370	1,820	20,560
2 Natural and applied sciences and related occupations	2,570	770	4,050	770	8,170
3 Health occupations	3,370	840	7,040	830	12,070
4 Occupations in education, law and social, community and government services	4,190	1,030	8,600	1,390	15,210
5 Occupations in art, culture, recreation and sport	1,060	550	1,840	240	3,700
6 Sales and service occupations	15,980	5,000	21,520	2,200	44,700
7 Trades, transport and equipment operators and related occupations	7,690	2,030	10,530	2,100	22,360
8 Natural resources, agriculture and related production occupations	610	850	1,100	140	2,710
9 Occupations in manufacturing and utilities	2,030	760	3,570	500	6,850
X Unclassified occupation	620	190	1,090	150	2,050
0 Legislative and senior management occupations	120	30	170	30	350
Total Occupations	44,460	14,210	69,880	10,170	138,720

Source: (Lightcast, 2024a)
Note: Total occupations jobs may not equal the sum of individual occupation jobs due to rounding.

Figure 2 presents jobs by occupation at the 1-digit NOC level in the LSA for 2023.

Figure 2: LSA Jobs by Occupation, 1-Digit NOC, 2023



Source: (Lightcast, 2024a)

Table 5 presents jobs growth by occupation at the 1-digit NOC level in the LSA for the period 2018 to 2023 and average wages. Between 2018 and 2023, the LSA experienced a 3.3% decline in total jobs from 143,470 to 138,720. This downturn affected six of the eleven occupational groups while conversely five occupational groups saw growth.

The occupations that saw the largest decline were:

- Legislative and senior management occupations -20.5%;
- Natural resources, agriculture and related production occupations -14.5%; and
- Sales and service occupations -14.1%

The occupations that saw the largest increase were:

- Natural and applied sciences and related occupations 15.2%;
- Health occupations 12.7%; and
- Occupations in education, law and social, community and government services 5.4%

Regarding compensation, average annual wages in 2023 varied considerably across occupations highlighting disparities among different occupational groups.

With regards to highest average wages, legislative and senior management occupations stand as the clear outlier at $184,500, followed by natural and applied sciences and related occupations ($87,100) and occupations in education, law and social, community and government services ($83,000).

Sales and service occupations and natural resources, agriculture and related production occupations are amongst the lowest paying occupations with average wages of $46,700 and $47,800 respectively.

Table 5: LSA Jobs Growth and Average Wages by Occupation, 1-Digit NOC, 2018-2023

Occupation	2018	2023	Change	% Change	2023 Average Wages
1 Business, finance and administration occupations	20,470	20,560	90	0.4%	$69,300
2 Natural and applied sciences and related occupations	7,090	8,170	1,080	15.2%	$87,100
3 Health occupations	10,710	12,070	1,360	12.7%	$70,700
4 Occupations in education, law and social, community and government services	14,430	15,210	780	5.4%	$83,200
5 Occupations in art, culture, recreation and sport	4,040	3,700	-340	-8.4%	$58,100
6 Sales and service occupations	52,060	44,700	-7,360	-14.1%	$46,700
7 Trades, transport and equipment operators and related occupations	21,560	22,360	800	3.7%	$65,000
8 Natural resources, agriculture and related production occupations	3,170	2,710	-460	-14.5%	$47,800
9 Occupations in manufacturing and utilities	7,190	6,850	-340	-4.7%	$62,200
X Unclassified occupation	2,330	2,050	-280	-12.0%	
0 Legislative and senior management occupations	440	350	-90	-20.5%	$184,500
Total Occupations	143,470	138,720	-4,750	-3.3%	

Source: (Lightcast, 2024a)
Note: Total occupations jobs may not equal the sum of individual occupation jobs due to rounding.

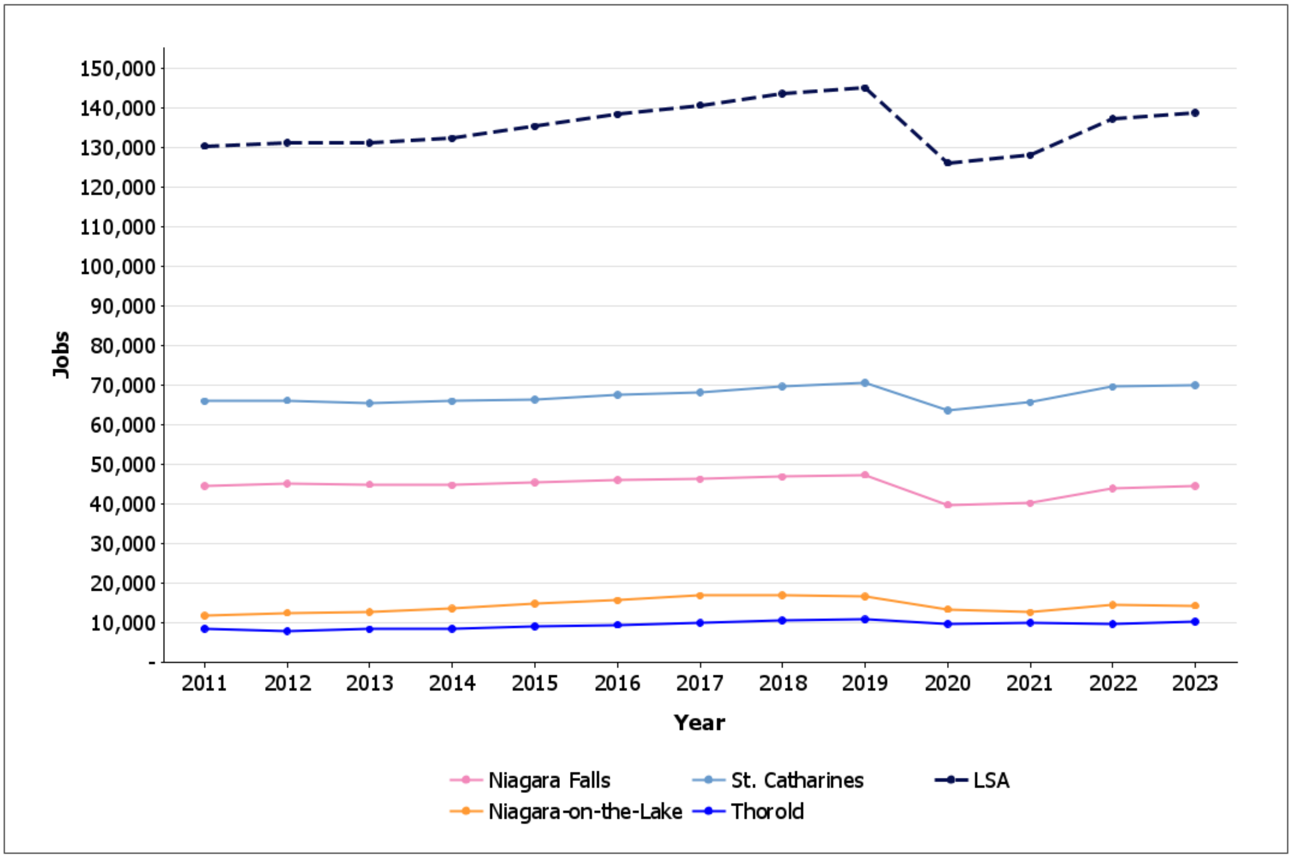
Figure 3 presents total jobs in the LSA and its constituent communities from 2011 to 2023. Total jobs in the LSA grew annually, peaking in 2019 before a sharp decline in 2020 coinciding with the onset of COVID-19 pandemic. Job numbers began to recover gradually in 2021, with a sharper increase in 2022, followed by steady growth. By 2023, however, total jobs in the LSA remained below the 2019 peak. Over the forecast period, the distribution of jobs across the LSA communities shifted as follows:

- Niagara Falls: 34.1% to 32.1%
- Niagara-on-the-Lake: 8.9% to 10.2%
- St. Catharines: 50.5% to 50.4%
- Thorold: 6.4% to 7.3%

Between 2011 and 2019, total jobs in the LSA rose by 11.2%, increasing from 130,250 to 144,880. This growth was driven by significant increases in Niagara-on-the-Lake (41.4%) and Thorold (27.1%), while St. Catharines and Niagara Falls saw more modest increases of 7.2% and 6.3%, respectively. The onset of the pandemic in 2020 caused a 13.0% drop in total jobs, declining to 126,050. Niagara-on-the-Lake experienced the steepest decline (-19.3%), followed by Niagara Falls (-16.0%), with both Thorold and St. Catharines declining by 10.0%.

From 2020 to 2023, total jobs rebounded by 10.1%, reaching 138,720. Niagara Falls led the recovery with a 12.0% increase, followed by St. Catharines (10.1%), Niagara-on-the-Lake (7.0%), and Thorold (5.8%).

Figure 3: LSA Total Jobs by Community, 2011-2023



Source: (Lightcast, 2024a)

Commuting Flow from Geography of Residence to Geography of Work

Table 6 highlights the commuting flows of employed individuals aged 15 and over within the LSA, categorized by their place of residence and work. The data reveals important insights into local labour mobility and the distribution of employment opportunities.

Of the 72,670 employed residents in the LSA, a majority (77.9%, or 56,645 individuals) work within the LSA, indicating a strong local employment base. Niagara Falls, the host municipality of the proposed Walker landfill expansion, employs 17,885 individuals (24.6%) of the total LSA labour force.

Community-Specific Highlights:

- Among LSA communities, St. Catharines has the highest proportion of its employed residents working within their own community (59.8%), followed by Niagara Falls (55.4%), highlighting strong local job retention.

- Thorold has the lowest proportion (18.0%) of employed residents working within their own community, although 71.2% work elsewhere within the LSA.
- Niagara-on-the-Lake leads with the highest share of residents working within the LSA (81.9%), closely followed by Niagara Falls (80.9%), highlighting strong local and regional ties.

The data also shows that St. Catharines contributes the smallest proportion of its residents (7.6%) to employment in Niagara Falls, while Niagara Falls residents compose the largest share of its workforce (55.4%). Overall, the commuting patterns suggest that most LSA residents work relatively close to home, with about four out of five employed individuals commuting within the LSA.

These commuting trends are important for understanding regional workforce dynamics in relation to the proposed landfill expansion in Niagara Falls.

Table 6: LSA Commuting Flow of Employed Individuals Aged 15+ by Community, 2021

Study Area	Place of Residence	Place of Work					
		In Niagara Falls		In Community		In LSA	
	#	#	%	#	%	#	%
Niagara Falls	24,475	13,565	55.4%	13,565	55.4%	19,790	80.9%
Niagara-on-the-Lake	3,885	570	14.7%	1,665	42.9%	3,180	81.9%
St. Catharines	37,775	2,880	7.6%	22,575	59.8%	29,020	76.8%
Thorold	6,535	870	13.3%	1,175	18.0%	4,655	71.2%
Total LSA	72,670	17,885	24.6%			56,645	77.9%

Source: (Statistics Canada, 2022a)

4.1.1.2 RSA

Resident Labour Force Characteristics

Table 7 presents a comparative overview of the 2021 labour force characteristics for the LSA and the RSA. In 2021 the working-age population (aged 15+) in Niagara Region was approximately 398,950 people of which the LSA comprised about 57.6%. There was very little difference (0.4%) in the participation rate for the LSA versus the RSA (58.2% and 58.5% respectively). The unemployment rate for the LSA was marginally higher (2.6%) than the RSA (18.1% versus 15.5%).

Table 7: LSA and RSA Resident Labour Force Characteristics, 2021

Study Area	Population 15+	In Labour Force	Participation Rate	Employed	Unemployed	Unemployment Rate
LSA	229,700	133,600	58.2%	109,480	24,120	18.1%
RSA	398,950	233,555	58.5%	197,365	36,190	15.5%

Source: (Avaanz Ltd., 2024a) (Statistics Canada, 2023a)

Table 8 presents employed residents within the LSA compared to the RSA for the period 2016 to 2021. Over the period 2016 to 2021 the number of employed resident labour force within the RSA declined 12,525 (-6.0%). The employed resident labour force of the LSA declined 3.1% more than the RSA at -9.1%.

Table 8: LSA and RSA Employed Residents, 2016-2021

Study Area	2016	2021	Change	% Change
LSA	120,500	109,480	-11,020	-9.1%
RSA	209,890	197,365	-12,525	-6.0%

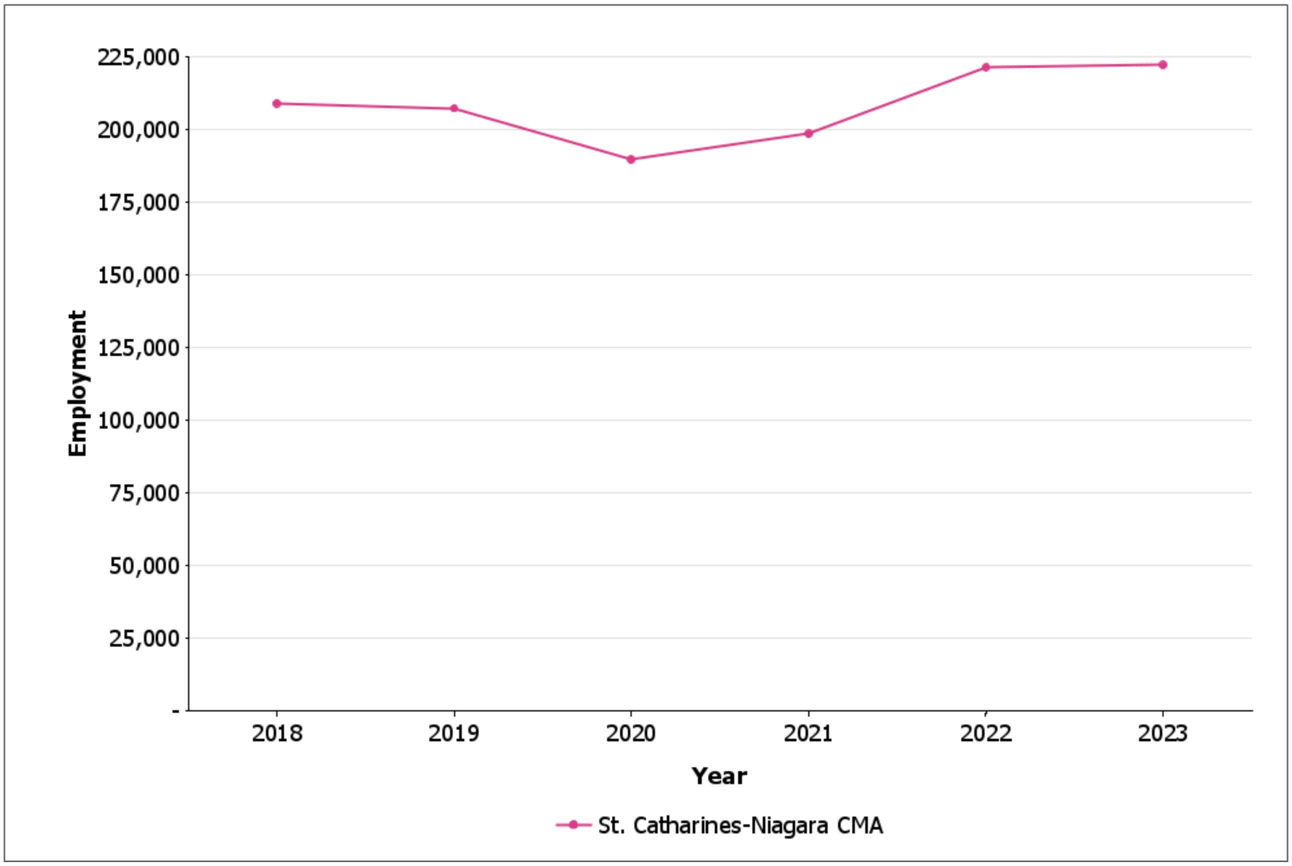
Source: (Statistics Canada, 2017) (Statistics Canada, 2023b)

More recent data is available from Statistics Canada for St. Catherines – Niagara CMA (excludes Grimsby and West Lincoln). The CMA represented about 94% of the RSA population 15+ in 2021. Recent trends for the CMA over the period 2021-2023 are as follows:

- Population 15+ increased 2.6%
- In labour force increased 6.6%
- Participation rate increased 2.3%
- Employment increased 11.9%
- Unemployment decreased 40.2%
- Unemployment rate decreased 4.5%

Figure 4 presents employment trends for the St. Catherines – Niagara CMA over the period 2018 to 2023. As indicated by the chart, employment reached a low in 2020 coinciding with the onset of the COVID-19 pandemic and recovered to new highs in 2022 before levelling off.

Figure 4: St. Catharines – Niagara CMA Employment, 2018-2023



Source: (Statistics Canada, 2024a)

Occupations

Table 9 presents a comparison of jobs by occupation at the 1-digit NOC level for the LSA and RSA in 2023. In 2023, the LSA accounted for 60.3% of total jobs in the RSA, with 138,720 jobs out of 229,990. The distribution of jobs amongst occupation types in both areas was similar. This alignment indicates a consistent occupational structure across both areas. The top five occupations accounting for over 80% of jobs in the RSA were:

- Sales and service occupations 30.4%
- Trades, transport and equipment operators and related occupations 16.8%
- Business, finance and administration occupations 14.7%
- Occupations in education, law and social, community and government services 11.1%
- Health occupations 8.1%

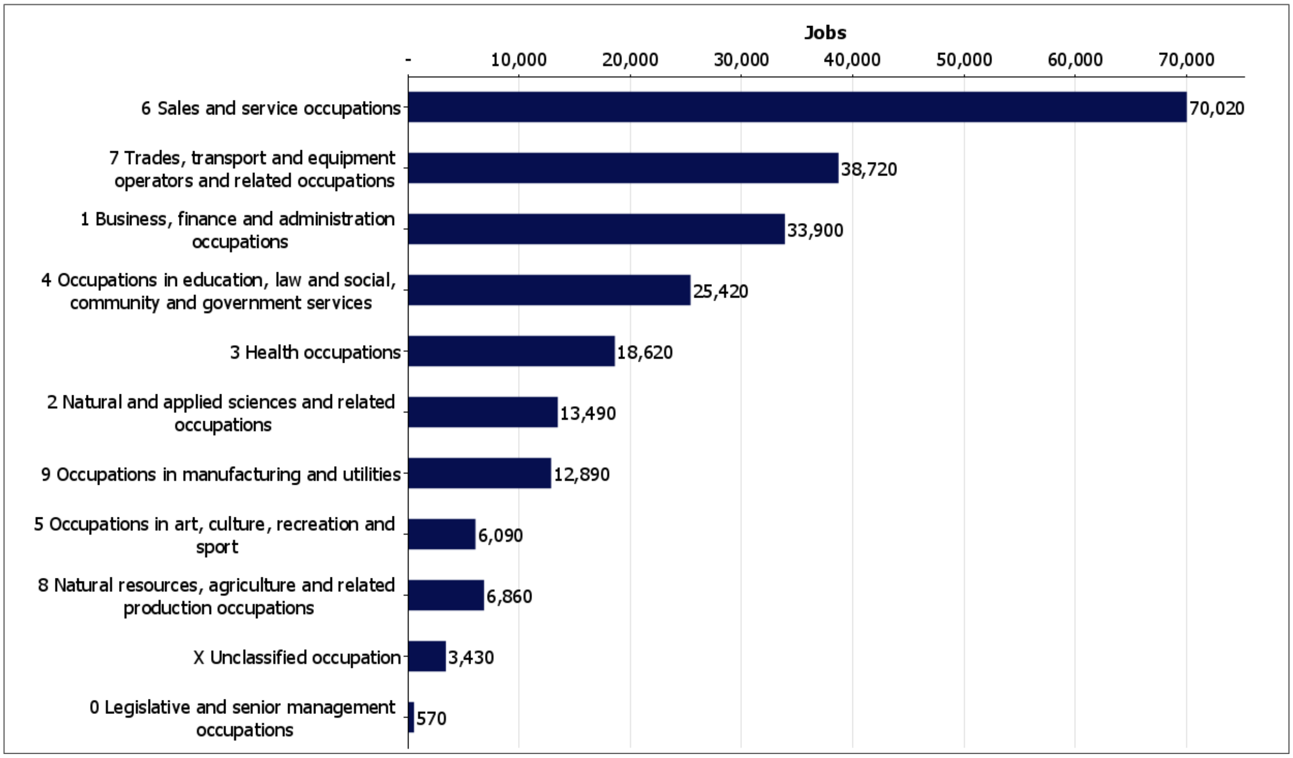
Table 9: LSA and RSA Jobs Occupation, 1-Digit NOC, 2023

Occupation	LSA	RSA
1 Business, finance and administration occupations	20,560	33,900
2 Natural and applied sciences and related occupations	8,170	13,490
3 Health occupations	12,070	18,620
4 Occupations in education, law and social, community and government services	15,210	25,420
5 Occupations in art, culture, recreation and sport	3,700	6,090
6 Sales and service occupations	44,700	70,020
7 Trades, transport and equipment operators and related occupations	22,360	38,720
8 Natural resources, agriculture and related production occupations	2,710	6,860
9 Occupations in manufacturing and utilities	6,850	12,890
X Unclassified occupation	2,050	3,430
0 Legislative and senior management occupations	350	570
Total Occupations	138,720	229,990

Source: (Lightcast, 2024a)
Note: Total occupations jobs may not equal the sum of individual occupation jobs due to rounding.

Figure 5 presents jobs by occupation at the 1-digit NOC level for the RSA in 2023.

Figure 5: RSA Jobs by Occupation, 1-Digit NOC, 2023



Source: (Lightcast, 2024a)

Table 10 presents job growth by occupation at the 1-digit NOC level in the RSA from 2018 to 2023, along with average wages. During this period, total jobs in the RSA increased by 3.2%, rising from 222,920 to 229,990. However, job growth varied across occupational groups, with seven of the eleven occupation categories experiencing increases, while four saw declines.

The largest job gains in the RSA occurred in:

- Natural and applied sciences and related occupations: +23.4% (2,560 jobs)
- Health occupations: +15.4% (2,480 jobs)
- Education, law, and social, community and government services: +9.6% (2,230 jobs)

These occupations also showed similar trends of growth in the LSA.

Conversely, the largest job declines in the RSA were observed in:

- Legislative and senior management occupations: -13.6% (-90 jobs)
- Sales and service occupations: -6.5% (-4,850 jobs)
- Unclassified occupations: -3.9% (-140 jobs)

The declines in these sectors were more pronounced in the LSA than in the RSA, highlighting a greater impact on these industries within the LSA.

Table 10: RSA Jobs and Average Wages by Occupation, 1-Digit NOC, 2018-2023

Occupation	2018	2023	Change	% Change	2023 Average Wages
1 Business, finance and administration occupations	31,460	33,900	2,440	7.8%	$69,700
2 Natural and applied sciences and related occupations	10,930	13,490	2,560	23.4%	$86,800
3 Health occupations	16,140	18,620	2,480	15.4%	$69,900
4 Occupations in education, law and social, community and government services	23,190	25,420	2,230	9.6%	$83,000
5 Occupations in art, culture, recreation and sport	6,040	6,090	50	0.8%	$56,600
6 Sales and service occupations	74,870	70,020	-4,850	-6.5%	$46,900
7 Trades, transport and equipment operators and related occupations	36,440	38,720	2,280	6.3%	$65,000
8 Natural resources, agriculture and related production occupations	7,010	6,860	-150	-2.1%	$47,600
9 Occupations in manufacturing and utilities	12,610	12,890	280	2.2%	$61,500
X Unclassified occupation	3,570	3,430	-140	-3.9%	
0 Legislative and senior management occupations	660	570	-90	-13.6%	$184,800
Total Occupations	222,920	229,990	7,070	3.2%	

Source: (Lightcast, 2024a)
Note: Total occupations jobs may not equal the sum of individual occupation jobs due to rounding.

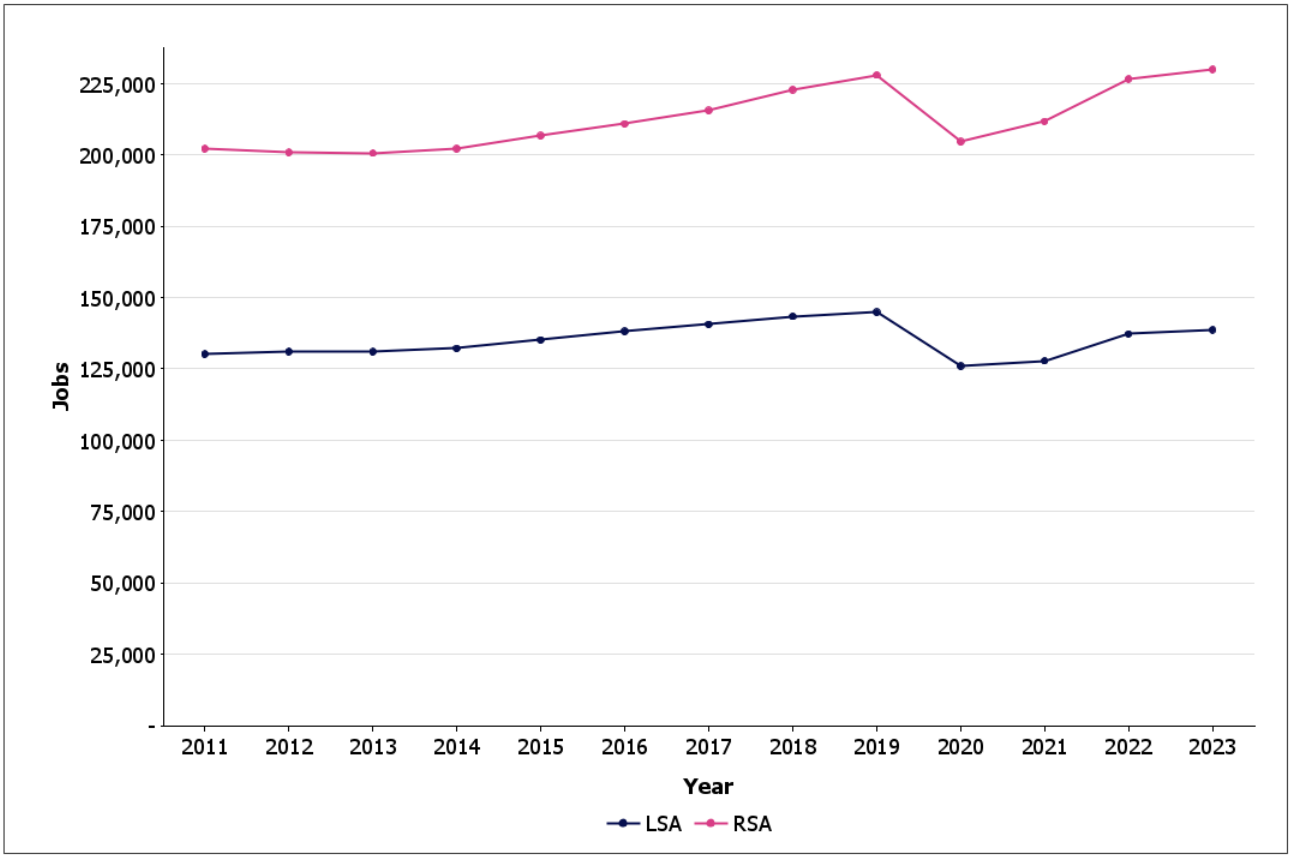
Figure 6 presents total jobs in the LSA and RSA from 2011 to 2023. Both regions exhibit similar trends, with job numbers rising to a peak in 2019, followed by a sharp decline in 2020 coinciding with the onset of COVID-19 pandemic, and a subsequent period of recovery. However, the RSA showed slightly stronger growth and greater resilience compared to the LSA.

Between 2011 and 2019, total jobs in the RSA increased by 12.7%, outpacing the LSA's 11.2% growth by 1.5%. In 2020, job losses in the RSA were less severe (-10.3%) compared to the LSA (-

13.0%). From 2020 to 2023, the RSA again demonstrated stronger recovery, with job growth of 12.4%, exceeding the LSA's growth of 10.1%.

These trends indicate that while both regions followed similar jobs patterns, the RSA demonstrated a slightly stronger capacity for growth and recovery than the LSA.

Figure 6: LSA and RSA Total Jobs, 2011-2023



Source: (Lightcast, 2024a)

Commuting Flow from Geography of Residence to Geography of Work

Table 11 provides an overview of commuting flows among employed individuals aged 15 and over within the LSA and RSA, categorized by their place of residence and work. The data highlights regional labour mobility and the proximity of employment opportunities for residents.

Of the 129,975 employed residents in the RSA, a significant majority (84.0%, or 109,200 individuals) work within the region, demonstrating strong regional job retention. Within this group, 21,795 individuals (16.8%) work in Niagara Falls, the host municipality of the proposed Walker landfill expansion.

Key Highlights:

- The LSA retains a higher proportion of its employed residents working within the region (89.8%) compared to the RSA (84.0%), indicating stronger local employment patterns.
- Within the RSA, 53.4% of employed residents (69,390 individuals) commute to the LSA for work, emphasizing the LSA's importance as a regional employment center.
- Niagara Falls, as the proposed site for the Walker landfill expansion, employs 16.8% of RSA residents and 24.6% of LSA residents, underscoring its critical role in regional workforce dynamics.

Overall, the commuting trends demonstrate that a large majority of employed residents in both the LSA and RSA work relatively close to home, reflecting strong local and regional labour connections. This proximity is an important consideration for understanding workforce impacts associated with the proposed landfill expansion.

Table 11: LSA and RSA Commuting Flow of Employed Individuals Aged 15+, 2021

Study Area	Place of Residence	Place of Work					
	#	In Niagara Falls		In LSA		In Region	
		#	%	#	%	#	%
LSA	72,670	17,885	24.6%	56,645	77.9%	65,265	89.8%
RSA	129,975	21,795	16.8%	69,390	53.4%	109,200	84.0%

Source: (Statistics Canada, 2022b)

4.1.2 Businesses

Walker is proposing to locate additional disposal capacity (Phase 2) to the east of the existing South Landfill within the area currently occupied by Walker's Southeast Quarry located within Walker's existing Campus. The Walker Campus features diverse operations, including the engineered South Landfill for non-hazardous waste, a compost facility for organic waste, a Resource Recovery Area (RRA) for recycling materials, and a Renewable Natural Gas (RNG) facility. Additional facilities include biosolids processing, a residential waste drop-off depot, and an aggregate recycling area.

Business concentration within proximity of the proposed landfill expansion is sparse. No businesses other than Walker were identified within 500m of the site, while only one business—a landscaping, nursery, and garden center—was found within 500m-1000m. From 1000m to 2000m, 21 businesses were identified, with the largest employers in this range being General Motors - St. Catharines Propulsion Plant (1,445 employees) and Niagara College Canada (2,067 employees). Expanding to a 2000m radius from the boundary of Walker's Campus, 214 businesses operate, covering a wide spectrum of businesses. Just beyond this radius lies the Outlet Collection at Niagara, housing 108 businesses and serving as the fourth-largest private employer in the LSA.

The LSA contained 29,725 businesses as of June 2024, of which 28.5% (8,481) had employees. St. Catharines accounted for nearly half of these businesses with employees (48.5%), followed by Niagara Falls (31.7%), Niagara-on-the-Lake (12.0%), and Thorold (7.8%). Most businesses with employees in the LSA are small, with 70.8% employing 1-9 workers, while only 2.3% have 100 or more employees. Walker Industries is among the top employers in the highest employment category.

In 2022, the top 10 private employers in the LSA, spanning industries such as accommodation, manufacturing, retail trade, and finance, accounted for 10.7% of total jobs. Key employers include Niagara Fallsview Casino Resort (3,611 employees), Four Points (2,000 employees), and Andrew Peller Limited (1,774 employees). Major public employers include Brock University, the City of Niagara Falls, and the City of St. Catharines, which collectively represented 5.7% of LSA employment.

Within the RSA, there were 49,263 businesses as of June 2024, with the LSA accounting for 60.3% of the total and 59.3% of those with employees. Businesses with 1-9 employees comprised 72.5% of those in the RSA, indicating a similar dominance of small enterprises as in the LSA. Among the RSA's top 20 private employers, 17 (85%) are located within the LSA, reflecting its central role in regional economic activity. Key public employers in the RSA include Niagara Health (6,770 employees) and the District School Board of Niagara (6,160 employees), representing 11.6% of total RSA employment in 2022.

4.1.2.1 Walker

Walker is proposing to locate additional disposal capacity (Phase 2) to the east of the existing South Landfill within the area currently occupied by Walker's Southeast Quarry located within Walker's existing Campus. The Walker Campus encompasses several operations:

- **South Landfill:** A state-of-the-art, engineered landfill designed with safety and environmental controls. The landfill accepts only solid non-hazardous waste.
- **Niagara Compost Facility:** This facility processes organic waste, including food scraps and yard waste, converting them into compost products that enrich local soils.
- **Resource Recovery Area (RRA):** Focused on recycling and repurposing materials such as wood waste, railway ties, asphalt shingles, and clean soils, creating new products from waste materials.
- **Niagara Renewable Natural Gas (RNG) & Landfill Gas Utilization Facility**: The campus captures landfill gas generated from decomposing waste and converts it into renewable energy. The Niagara RNG facility will deliver enough renewable energy to the traditional natural gas grid to power 8, 750 homes. Walker delivers landfill gas to the nearby General Motors plant, where it is used to generate renewable electricity.
- **Biosolids Facility:** This facility processes biosolids from municipal wastewater treatment, producing a nutrient-rich, low-odour agricultural amendment.

- **Residential Drop-Off (RDO):** Serving residents of St. Catharines, Niagara Falls, and Niagara-on-the-Lake, this depot accepts household waste and recyclables.
- **Aggregate Recycling & Processing Area:** This area provides recycled aggregates for construction and landscaping needs.
  (Walker, 2024a)

Operations for the organics composting facility, biosolids facility, and residential waste and recycling drop-off are in partnership with Region of Niagara. The Niagara RNG Facility is a collaborative project between Walker Industries, Enbridge Gas Inc., and Comcor Environmental Limited (Walker, 2023).

4.1.2.2 LSA

Business Inventory

Within 500m of the proposed landfill expansion site, no businesses other than Walker were identified. Within 500m-1000m of the proposed site, one business was identified (excluding Walker), a landscaping, nursery and garden centre business.

Between 1000m–2000m of the proposed site, 21 businesses were identified. The location these businesses by Municipality is as follows: 10 businesses in Thorold, 7 businesses in Niagara Falls, 2 businesses in Niagara-on-the-Lake, and 2 business in St. Catharines. These businesses encompass a broad spectrum of business types including, but not restricted to restaurants, accommodation, recreation, retail trade, public administration, construction, education, wholesale trade, and manufacturing. The largest employers within 1000m-2000m of the proposed site include General Motors - St. Catharines Propulsion Plant (1,445 employees) and Niagara College Canada (2,067 employees) (Niagara Economic Development, 2024b).

Between 2000m radius of the proposed expansion site and 2000m radius of the boundary of the entire Walker Campus there are an additional 214 businesses. Names and addresses of businesses within the described geographical zones are available in **Appendix A** of this report.

Just outside of the 2000m radius from the Walker Campus is the Outlet Collection at Niagara, an outlet mall the fourth largest private employer in the LSA. Within the mall there are 108 businesses that range from clothing retailers, sporting goods retailers, health and beauty retailers, as well as a variety of restaurants and food services.

Business Counts

Table 12 presents the total business counts, with and without employees, by community within the LSA as of June 2024. The LSA had a total of 29,725 businesses, of which 28.5% (8,481) had employees. The distribution of businesses with employees across the LSA communities was as follows:

- Niagara Falls: 31.7%
- Niagara-on-the-Lake: 12.0%

- St. Catharines: 48.5%
- Thorold: 7.8%

The geographic distribution of businesses by community within the LSA similarly mirrors the allocation of jobs.

Table 12: LSA Total Business Counts by Community, June 2024

Community	With Employees	Without Employees	Total
Niagara Falls	2,689	7,076	9,765
Niagara-on-the-Lake	1,017	2,539	3,556
St. Catharines	4,117	9,611	13,728
Thorold	658	2,018	2,676
Total LSA	8,481	21,244	29,725

Source: (Lightcast, 2024b)

Table 13 presents business counts by number of employees within the LSA for June 2024. Among businesses with employees, the distribution of businesses by employee count is as follows:

- 1-9 employees 70.8% (6,001)
- 10-49 employees 22.7% (1,921)
- 50-99 employees 4.3% (361)
- 100+ employees 2.3% (198)

According to the 2022 Employment Inventory (Docker, 2023), Walker Industries Inc. falls within the top category of businesses employing 100 or more individuals.

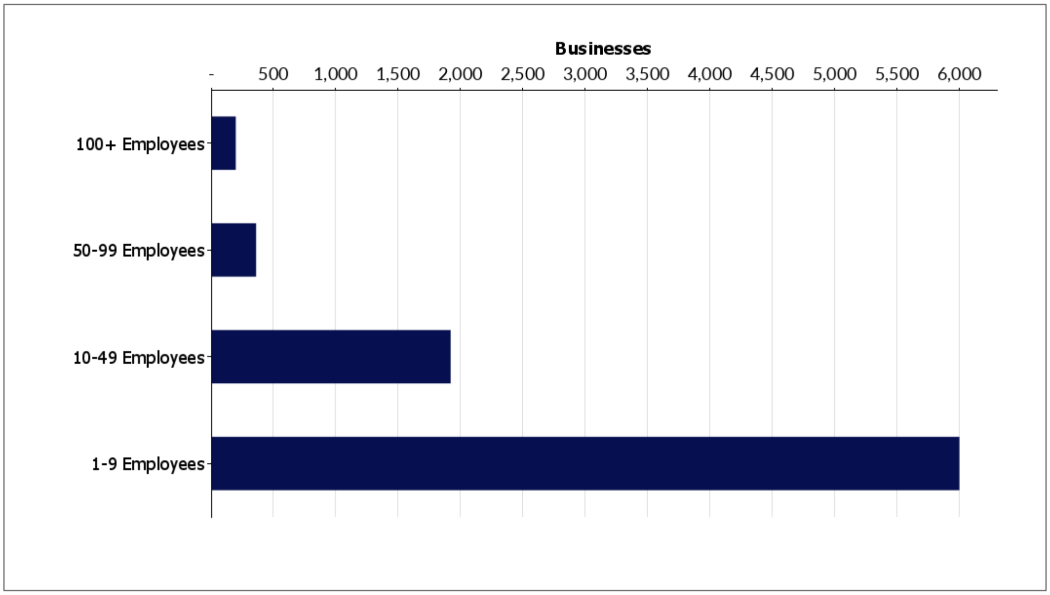
Table 13: LSA Business Counts by Number of Employees, June 2024

Community	1-9 Employees	10-49 Employees	50-99 Employees	100+ Employees	Total With Employees
Niagara Falls	1,895	591	132	71	2,689
Niagara-on-the-Lake	681	263	43	30	1,017
St. Catharines	2,952	929	158	78	4,117
Thorold	473	138	28	19	658
Total LSA	6,001	1,921	361	198	8,481

Source: (Lightcast, 2024b)

Figure 7 presents business counts by number of employees by community within the LSA for June 2024.

Figure 7: LSA Business Counts by Number of Employees, June 2024



Source: (Lightcast, 2024b)

Major Employers

Table 14 presents top 10 private employers in the LSA by industry and community as of 2022. The top 10 employers within the LSA are located within the communities of Niagara Falls (4), St. Catherines (3), and Niagara-on-the-Lake (3). Five of the top employers in the accommodation and food services industry; two are in manufacturing; and the remaining three are in retail trade; finance and insurance; and administrative and support, waste management, and remediation services. Based on Lightcast industry jobs data the top 10 employers represented about 10.7% of total jobs in the LSA in 2022.

Table 14: LSA Top 10 Private Employers, 2022

	Name	Municipality	Industry	Employees
1	Niagara Fallsview Casino Resort	Niagara Falls	71 Arts, entertainment and recreation 72 Accommodation and food services	3,611
2	Four Points	Niagara Falls	72 Accommodation and food services	2,000
3	Andrew Peller Limited	Niagara-on-the-Lake	31-33 Manufacturing	1,774
4	Outlet Collection at Niagara	Niagara-on-the-Lake	44-45 Retail trade	1,450
5	General Motors Canada	St. Catharines	31-33 Manufacturing	1,445
6	Lais Hotel Properties Limited Vintage Hotels	Niagara-on-the-Lake	72 Accommodation and food services	1,184
7	Hilton Hotels and Suites	Niagara Falls	72 Accommodation and food services	1,000
8	Meridian Credit Union	St. Catharines	52 Finance and insurance	799
9	Commercial Cleaning Services	St. Catharines	56 Admin support, waste management, remediation	744
10	Great Wolf Lodge	Niagara Falls	72 Accommodation and food services	733

Source: (Niagara Economic Development, 2024b)

Table 15 presents the largest public employers confined to the LSA by industry and community including Brock University, City of Niagara Falls, and City of St. Catherines. There are other large public employers within the LSA however their employment is distributed more broadly across Niagara Region. Based on Lightcast industry jobs data the three top public employers represented about 5.7% of total employment in the LSA in 2022.

Table 15: LSA Top Public Employers, 2022

	Name	Municipality	Industry (NAICS)	Employees
1	Brock University	St. Catharines	61 Educational services	5,750
2	City of Niagara Falls	Niagara Falls	91 Municipal government	1,061
3	City of St. Catharines	St. Catherines	91 Municipal government	1,042

Source: (Niagara Economic Development, 2024b)

4.1.2.3 RSA

Business Counts

Table 16 presents a comparison of total business counts with and without employees in the LSA and RSA for June 2024. The total number of businesses within the RSA was 49,623 of which 29.0% (14,302) had employees.

The LSA accounted for 60.3% of the total businesses within the RSA and 59.3% of businesses with employees.

Table 16: LSA and RSA Total Business Counts, June 2024

Study Area	With Employees	Without Employees	Total
LSA	8,481	21,244	29,725
RSA	14,302	34,961	49,263

Source: (Lightcast, 2024b)

Table 17 presents business counts by number of employees within the LSA and RSA for June 2024. Amongst businesses with employees, the apportionment of businesses by employment in the RSA was as follows:

- 1-9 employees 72.5% (10,363)
- 10-49 employees 21.7% (3,107)
- 50-99 employees 3.7% (530)
- 100+ employees 2.1% (302)

The distribution of businesses by number of employees within the RSA is generally similar to the LSA within slightly less proportion of businesses with 1-9 employees, and slightly more proportion of larger businesses.

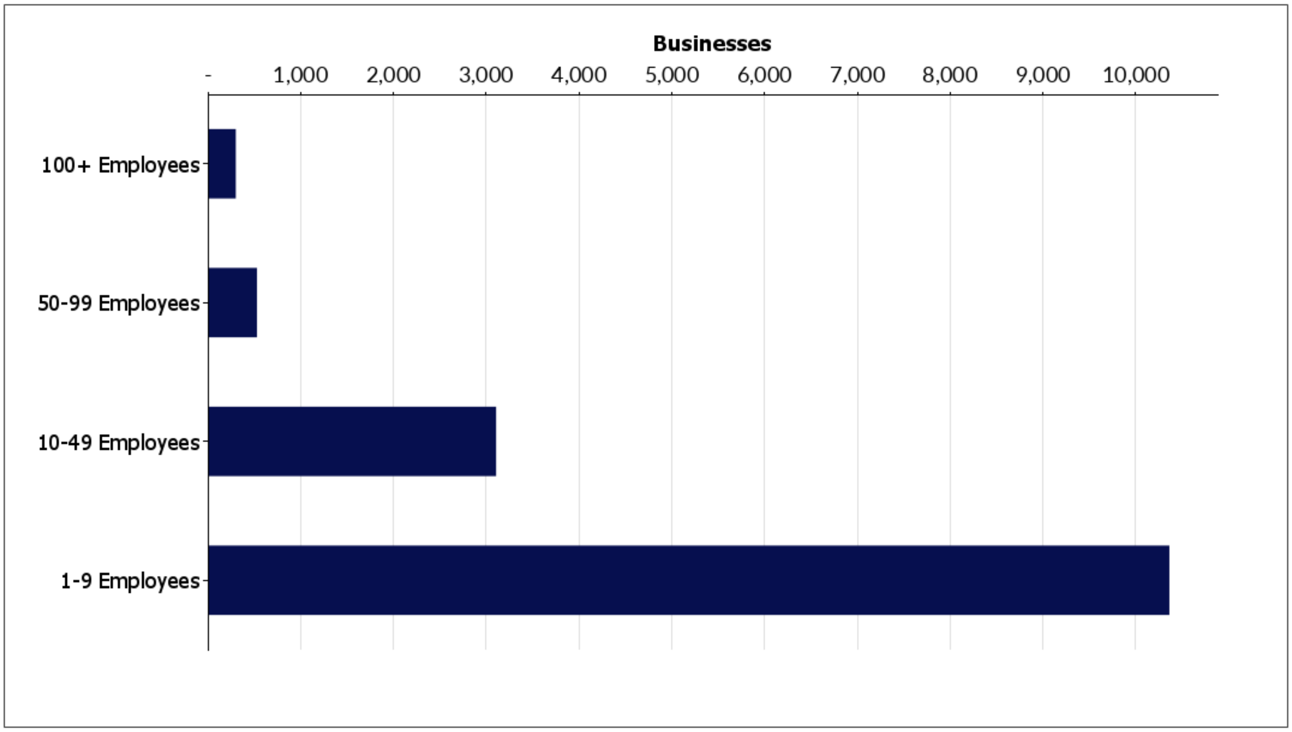
Table 17: LSA and RSA Business Counts by Number of Employees, June 2024

Study Area	1-9 Employees	10-49 Employees	50-99 Employees	100+ Employees	Total With Employees
LSA	6,001	1,921	361	198	8,481
RSA	10,363	3,107	530	302	14,302

Source: (Lightcast, 2024b)

Figure 8 presents business counts by number of employees by community within the RSA for June 2024.

Figure 8: RSA Business Counts by Number of Employees, June 2024



Source: (Lightcast, 2024b)

Major Employers

Of the top 20 private employers in the RSA, 17 (85%) are located within the LSA. The largest private employer outside the LSA but within the RSA is Canadian Tire Financial Services in Welland, which ranks as the 8th largest private employer in the Region with 983 employees (Niagara Economic Development, 2024b).

Table 18 presents the largest public employers distributed across the RSA. Many of these public employers are likely to be concentrated within the LSA although they are not confined to that area. Of the largest public employers distributed across the RSA, 4 are associated with public administration, 3 are related to educational services, and 1 is related to health care and social assistance. Based on Lightcast industry jobs data these public employers represented 11.6% of total jobs in the RSA in 2022.

Table 18: RSA, Top Public Employers Distribution, 2022

	Name	Industry (NAICS)	Employees
1	Niagara Health	62 Health care and social assistance	6,770
2	District School Board of Niagara	61 Educational services	6,160
3	Niagara Region	91 Public administration	4,299
4	Niagara Catholic District School Board	61 Educational services	2,169
5	Niagara College Canada	61 Educational services	2,067
6	Government of Canada	91 Public administration	1,850
7	Government of Ontario	91 Public administration	1,685
8	Niagara Regional Police Service	91 Public administration	1,230

Source: (Niagara Economic Development, 2024b)

4.1.3 Industry

This section examines industry job growth, average wages, and sales in the LSA and RSA. In 2023, over 50% of LSA jobs were concentrated in five industries: health care and social assistance (14.2%), retail trade (12.7%), accommodation and food services (10.7%), construction (7.3%), and manufacturing (6.8%). Similar trends were observed in the RSA, where these industries also accounted for the majority of jobs, with minor differences in proportions and rankings.

Between 2018 and 2023, the LSA experienced job growth in 11 of 21 industries, with the management of companies and enterprises leading growth at +57.1%, followed by real estate and rental and leasing (+29.8%) and transportation and warehousing (+24.9%). However, declines were significant in arts, entertainment, and recreation (-37.1%), accommodation and food services (-28.0%), and agriculture, forestry, fishing, and hunting (-19.2%), underscoring the disproportionate impact of the pandemic on tourism and agriculture. Comparatively, the RSA demonstrated broader industry growth, with notable increases in manufacturing (+6.6%), public administration (+6.9%), and information and cultural industries (+8.1%), industries that either declined or stagnated in the LSA.

Tourism, a cornerstone of the Niagara region, was severely affected by the COVID-19 pandemic. Total tourism jobs in the LSA declined by 26.3% between 2018 and 2023, with reductions in accommodation and hospitality (-28.3%) and arts, entertainment, and recreation (-37.2%). However, transportation (+64.1%) and beverage manufacturing (+4.5%) saw growth, indicating some resilience in niche areas. By 2023, tourism comprised 15.3% of total LSA jobs, with Niagara Falls and Niagara-on-the-Lake most dependent on this sector. In the RSA, tourism jobs also declined (-16.3%) but showed greater resilience compared to the LSA. Total tourism sales in the RSA amounted to $3.572 billion in 2022, with the LSA contributing $2.528 billion (67.0%).

The farm industry, while smaller in scale, plays an important role in the LSA, especially in Niagara-on-the-Lake, renowned for its vineyards. In 2023, farm jobs in the LSA accounted for 1.2% of total employment, with Niagara-on-the-Lake comprising 54.9% of these jobs. Between 2018 and 2023, LSA farm jobs declined considerably by 18.6%. In contrast, the RSA demonstrated greater resilience, with farm employment declining by only 7.4% in the same period. Farm sales in the RSA totaled $3.586 billion in 2022, with the LSA contributing $1.212 billion (33.8%), primarily driven by Niagara-on-the-Lake, which accounted for 57.8% of the LSA's farm sales.

In terms of industry sales, the LSA generated $29.9 billion in 2022, representing 56.0% of the RSA's total sales of $53.4 billion. The LSA experienced a sharper decline in sales during the pandemic (-9.2% compared to the RSA's -5.3%), and although it rebounded strongly with a 23.6% sales growth from 2020 to 2022. This growth was outpaced by the RSA's 29.3% increase during the same period.

4.1.3.1 LSA

Table 19 presents job growth by industry at the 2-digit NAICS level in the LSA from 2018 to 2023, along with average wages.

In 2023, the top five industries accounted for over 50% of total jobs in the LSA:

- Health care and social assistance: 14.2%
- Retail trade: 12.7%
- Accommodation and food services: 10.7%
- Construction: 7.3%
- Manufacturing: 6.8%

Between 2018 and 2023, jobs increased in 11 of 21 industries and declined in 10.

The five industries with the largest job increases during this period were:

- Management of companies and enterprises: +57.1%
- Real estate and rental and leasing: +29.8%
- Transportation and warehousing: +24.9%
- Mining, quarrying, and oil and gas extraction: +16.7%
- Finance and insurance: +13.6%

The five industries with the largest job declines were:

- Arts, entertainment, and recreation: -37.1%
- Accommodation and food services: -28.0%
- Agriculture, forestry, fishing, and hunting: -19.2%
- Other services (except public administration): -16.4%
- Unclassified: -12.0%

Regarding average wages, utilities were the highest at $102,000, followed by mining, quarrying, and oil and gas extraction ($79,600) and public administration ($76,400). Conversely, the lowest average wages were in accommodation and food services ($24,400), arts, entertainment, and recreation ($31,900), and retail trade ($32,200).

Table 19: LSA Jobs and Average Wages by Industy, 2-Digit NAICS, 2018-2023

NAICS	2018	2023	Change	% Change	Average Wages
11 Agriculture, forestry, fishing and hunting	2,030	1,640	-390	-19.2%	$37,100
21 Mining, quarrying, and oil and gas extraction	120	140	20	16.7%	$79,600
22 Utilities	940	1,020	80	8.5%	$102,000
23 Construction	9,150	10,100	950	10.4%	$66,500
31-33 Manufacturing	9,560	9,370	-190	-2.0%	$64,100
41 Wholesale trade	5,360	5,500	140	2.6%	$62,900
44-45 Retail trade	18,850	17,580	-1,270	-6.7%	$31,900
48-49 Transportation and warehousing	4,900	6,120	1,220	24.9%	$57,000
51 Information and cultural industries	1,390	1,340	-50	-3.6%	$65,200
52 Finance and insurance	3,980	4,520	540	13.6%	$61,800
53 Real estate and rental and leasing	2,380	3,090	710	29.8%	$47,500
54 Professional, scientific and technical services	7,700	8,550	850	11.0%	$70,300
55 Management of companies and enterprises	210	330	120	57.1%	$72,900
56 Administrative and support, waste management and remediation services	8,100	7,430	-670	-8.3%	$49,400
61 Educational services	8,530	8,990	460	5.4%	$63,800
62 Health care and social assistance	17,650	19,750	2,100	11.9%	$49,800
71 Arts, entertainment and recreation	6,090	3,830	-2,260	-37.1%	$32,200
72 Accommodation and food services	20,670	14,880	-5,790	-28.0%	$24,400
81 Other services (except public administration)	5,740	4,800	-940	-16.4%	$47,700
91 Public administration	7,800	7,690	-110	-1.4%	$76,400
X0 Unclassified	2,330	2,050	-280	-12.0%	$64,100
Total Industry	143,470	138,720	-4,750	-3.3%	$51,600

Source: (Lightcast, 2024c)
Note: Total industry jobs may not equal the sum of individual industry jobs due to rounding.

Table 20 presents 2022 total industry sales[3] in the LSA by community. In 2022 there was a total of $29.924 billion in sales within the LSA. St. Catharines was by far the largest contributor to sales, accounting for roughly half (50.5%) of total industry sales in the LSA, followed by Niagara Falls (32.2%), Niagara-on-the-Lake (9.7%), and Thorold (7.6%).

Table 20: LSA Total Industry Sales by Community, 2022

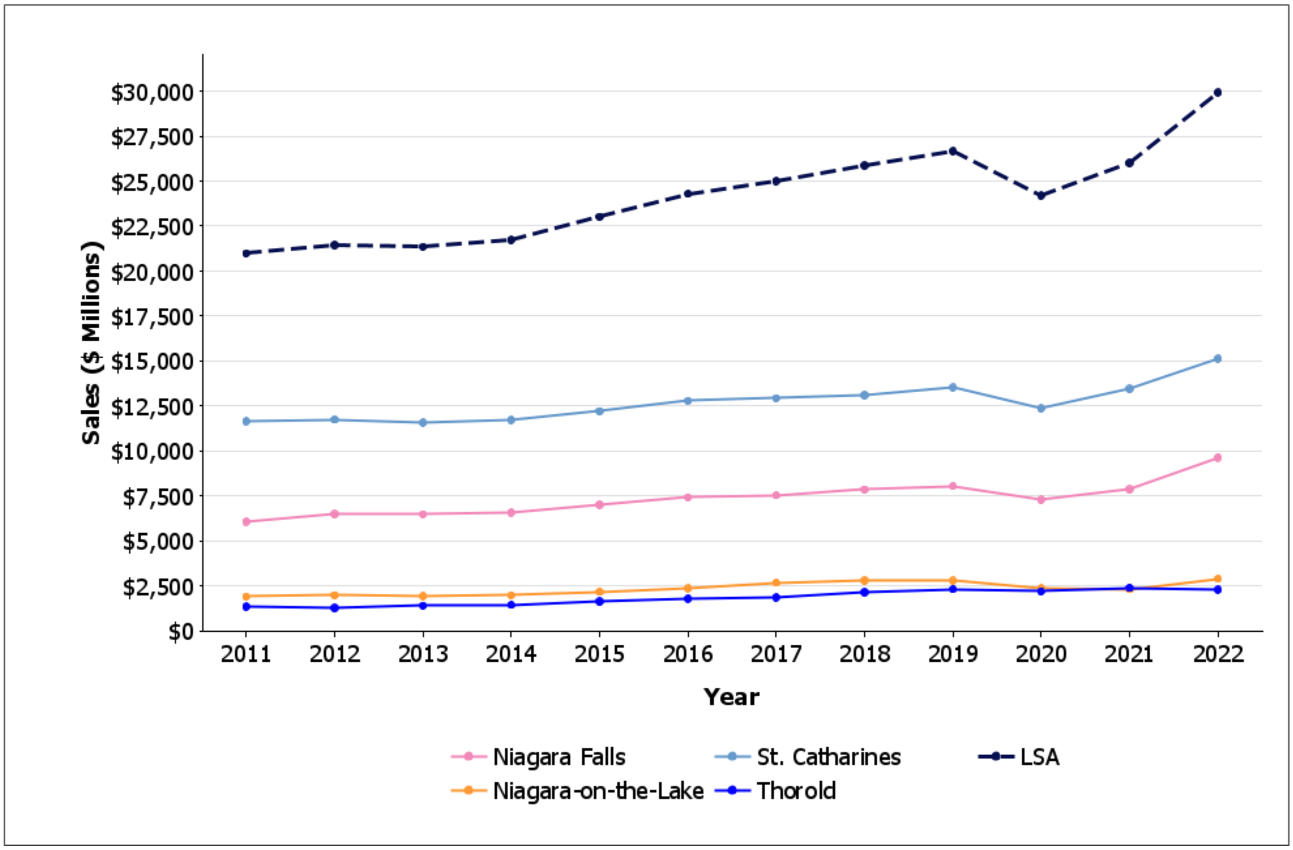
Community	Sales	Distribution
Niagara Falls	$9,636,246,000	32.2%
Niagara-on-the-Lake	$2,890,599,000	9.7%
St. Catharines	$15,122,279,000	50.5%
Thorold	$2,275,127,000	7.6%
Total LSA	$29,924,250,000	100.0%

Source: (Lightcast, 2024d)
Note: Sales for the total LSA may not equal the sum of sales for individual communities due to rounding.

Figure 9 presents total industry sales for the LSA and its constituent communities from 2011 to 2022. Between 2011 and 2014, the LSA experienced intermittent, modest sales growth, followed by strong annual growth through 2019, resulting in a 27.1% increase in total industry sales. In 2020, with the onset of the COVID-19 pandemic, sales declined sharply by 9.2%. However, from 2020 to 2022, sales rebounded significantly, rising by 23.6% and exceeding previous highs in all LSA communities except Thorold.

[3] *Sales is an industry's total annual sales (gross receipts), both to other industries and to consumers as well.*

Figure 9: LSA Total Industry Sales by Community, 2011-2022



Source: (Lightcast, 2024d)

Tourism

The Niagara region has long been among the prominent tourism regions in Canada given the large variety of attractions in the area including natural heritage, cultural heritage, and modern entertainment. Given these characteristics, tourism has historically been a major economic contributor in Niagara generating a significant amount of business activity, jobs, and other economic benefits.

The tourism industry was evaluated using the same framework as Statistics Canada's Canadian Tourism Satellite Account (CTSA), which follows the Tourism Satellite Account (TSA), an internationally accepted framework used to measure tourism activity in an economy. The industry sectors included in this report are those that are identified within the CTSA with the addition of beverage manufacturing given the importance of wineries, breweries, and distilleries to tourism in the Niagara Region.

The CTSA sector aggregation for the tourism industry including beverage manufacturing and the related 4-digit NAICS codes are presented in **Table 21**.

Table 21: Tourism Industry Sector Category Aggregation, 4-Digit NAICS

Tourism Industry Sector Category	4-Digit NAICS
Accommodation and Hospitality	• 7211 Traveller accommodation • 7212 Recreational vehicle (RV) parks and recreational camps • 7223 Special food services • 7224 Drinking places (alcoholic beverages) • 7225 Full-service restaurants and limited-service eating places
Arts, Entertainment, and Recreation	• 7111 Performing arts companies • 7112 Spectator sports • 7113 Promoters (presenters) of performing arts, sports and similar events • 7115 Independent artists, writers and performers • 7121 Heritage institutions • 7131 Amusement parks and arcades • 7132 Gambling industries • 7139 Other amusement and recreation industries
Transportation	• 4811 Scheduled air transportation • 4812 Non-scheduled air transportation • 4853 Taxi and limousine service • 4855 Charter bus industry • 4871 Scenic and sightseeing transportation, land • 4872 Scenic and sightseeing transportation, water
Travel Arrangement and Reservation Services	• 5615 Travel arrangement and reservation services
Beverage Manufacturing	• 3121 Beverage manufacturing

Source: (Niagara Region, 2019)

Table 22 presents tourism job growth by sector in the LSA from 2018 to 2023, along with average wages. During this period, the total number of tourism jobs in the LSA decreased by 26.3%, falling from 28,910 to 21,310. Jobs declined in three of the five tourism sectors, while only two saw increases. The overall decline was primarily driven by reductions in accommodation and hospitality (-5,800 jobs) and arts, entertainment, and recreation (-2,260 jobs).

On a percentage basis, the sectors experiencing declines were:

- Arts, Entertainment, and Recreation: -37.2%
- Accommodation and Hospitality: -28.3%
- Travel Arrangement and Reservation Services: -3.0%

The sectors with job growth were:

- Transportation: +64.1%

- Beverage Manufacturing: +4.5%

In 2023, tourism accounted for 15.3% of total jobs within the LSA. Among the constituent communities, tourism represented approximately one-fifth of jobs in Niagara Falls (21.7%) and Niagara-on-the-Lake (21.8%), compared to 11.4% in St. Catharines and 5.5% in Thorold.

In terms of wages, the highest average salaries were in travel arrangement and reservation services ($53,700), followed by beverage manufacturing ($48,600) and transportation ($47,000). The lowest-paying sectors were accommodation and hospitality ($24,400) and arts, entertainment, and recreation ($35,400).

Table 22: LSA Tourism Sector Jobs and Average Wages, 2018-2023

Tourism Sector	2018 Jobs	2023 Jobs	Change	% Change	2023 Average Wages
Accommodation and Hospitality	20,530	14,730	-5,800	-28.3%	$24,400
Arts, Entertainment, and Recreation	6,080	3,820	-2,260	-37.2%	$35,400
Transportation	640	1,050	410	64.1%	$47,200
Travel Arrangement and Reservation Services	330	320	-10	-3.0%	$53,700
Beverage Manufacturing	1,330	1,390	60	4.5%	$48,600
Total Tourism	28,910	21,310	-7,600	-26.3%	$25,500

Source: (Lightcast, 2024c)
Note: Total tourism jobs may not equal the sum of individual tourism industry jobs due to rounding.

Figure 10 presents total tourism jobs in the LSA and its constituent communities from 2011 to 2023. Tourism jobs in the LSA grew steadily until 2017, declined gradually through 2019, and then experienced a sharp drop in 2020 due to the onset of the COVID-19 pandemic. Job losses continued, albeit more gradually, bottoming out in 2021. A slight rebound occurred in 2022, with minimal change in 2023. By 2023, total tourism jobs in the LSA remained below 2019 levels.

Over the forecast period, the distribution of tourism jobs across LSA communities shifted significantly:

- Niagara Falls decreased from 63.7% to 45.4%
- Niagara-on-the-Lake increased from 12.0% to 14.5%
- St. Catharines increased from 23.0% to 37.4%
- Thorold increased from 1.3% to 2.6%

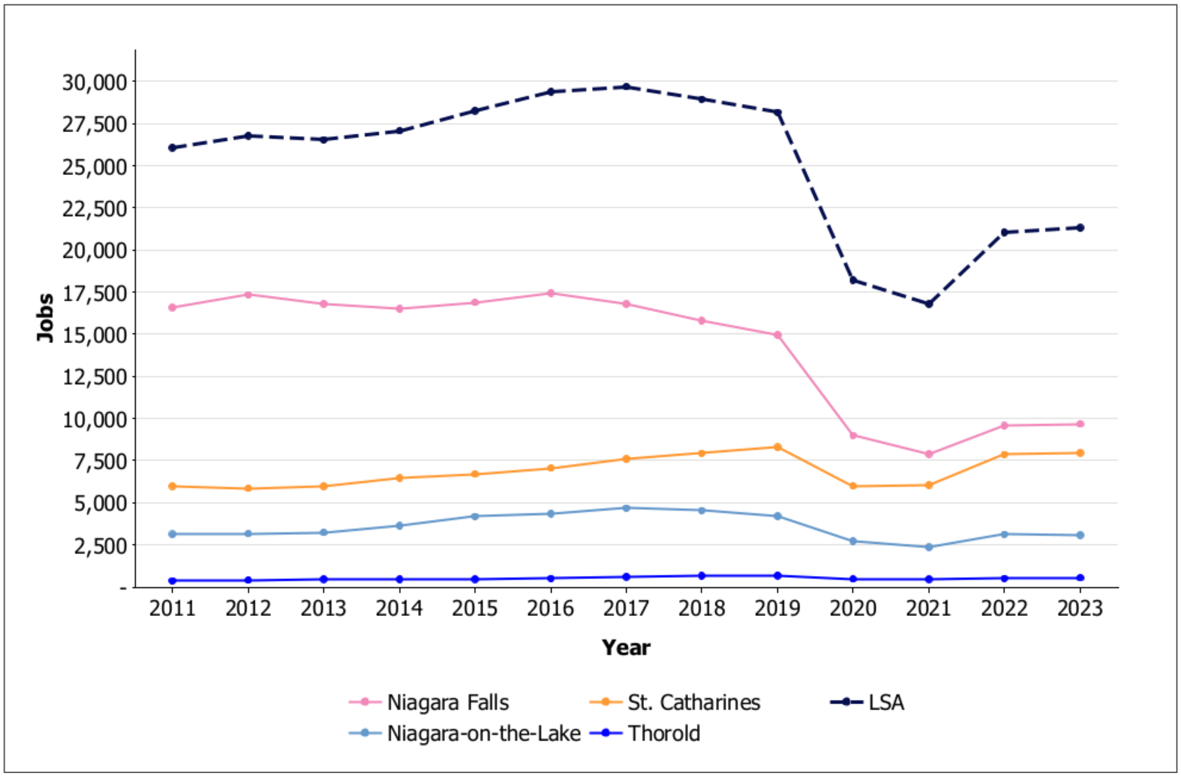
These changes reflect Niagara Falls' declining share of tourism jobs within the LSA.

Between 2011 and 2017, total tourism jobs in the LSA grew by 13.9% (2,070), from 26,070 to 29,700. Thorold experienced the strongest growth (85.3%), followed by Niagara-on-the-Lake (50.0%) and St. Catharines (27.0%), while Niagara Falls saw only a modest increase of 1.2%. From 2017 to 2019, total tourism jobs declined by 5.3% (-1,560), from 29,700 to 28,140, with Niagara Falls (-11.0%) and Niagara-on-the-Lake (-10.3%) experiencing the largest decreases. In contrast, St. Catharines and Thorold saw increases of 8.7% and 6.3%, respectively.

The COVID-19 pandemic caused a sharp decline in tourism demand due to travel restrictions, border closures, and business limitations, leading to substantial job losses in tourism-dependent sectors. In 2020, tourism jobs in the LSA fell by 35.3% (-9,920), from 28,140 to 18,220. Niagara Falls experienced the steepest decline (-40.1%), followed by Niagara-on-the-Lake (-35.2%), Thorold (-28.4%), and St. Catharines (-27.2%). Job losses continued into 2021, with a further 8.0% reduction (-1,460). Niagara-on-the-Lake (-13.6%) and Niagara Falls (-11.8%) led the losses, while Thorold's decline was minimal (-2.1%) and St. Catharines began a modest recovery (+0.7%).

From 2021 to 2023, tourism jobs in the LSA partially recovered, increasing by 27.1% (4,550) to 21,310. Niagara-on-the-Lake led the recovery with a 32.4% increase, followed by St. Catharines (31.5%), Niagara Falls (22.4%), and Thorold (19.1%). Despite these gains, all LSA communities remained below their 2019 pre-pandemic tourism job levels, with Niagara Falls experiencing the largest shortfall.

Figure 10: LSA Total Tourism Industry Jobs by Community, 2011-2023



Source: (Lightcast, 2024c)

Table 23 presents 2022 tourism sales by sector in the LSA. In 2022 total tourism sales within the LSA amounted to approximately $2.528 billion, representing 8.4% of total industry sales. The accommodation and hospitality sector was the largest contributor, accounting for 58.5% of tourism sales. Beverage manufacturing followed with 21.5%, while arts, entertainment, and recreation contributed 15.4%. Transportation accounted for 3.8%, and travel arrangement and reservation services made up the remaining 0.8%.

Table 23: LSA Sales by Tourism Sector, 2022

Tourism Sectors	Sales	Distribution
Accommodation and Hospitality	$1,478,882,000	58.5%
Arts, Entertainment, and Recreation	$388,311,000	15.4%
Transportation	$96,622,000	3.8%
Travel arrangement and reservation services	$20,882,000	0.8%
Beverage manufacturing	$543,098,000	21.5%
Total	$2,527,795,000	100%

Source: (Lightcast, 2024d)

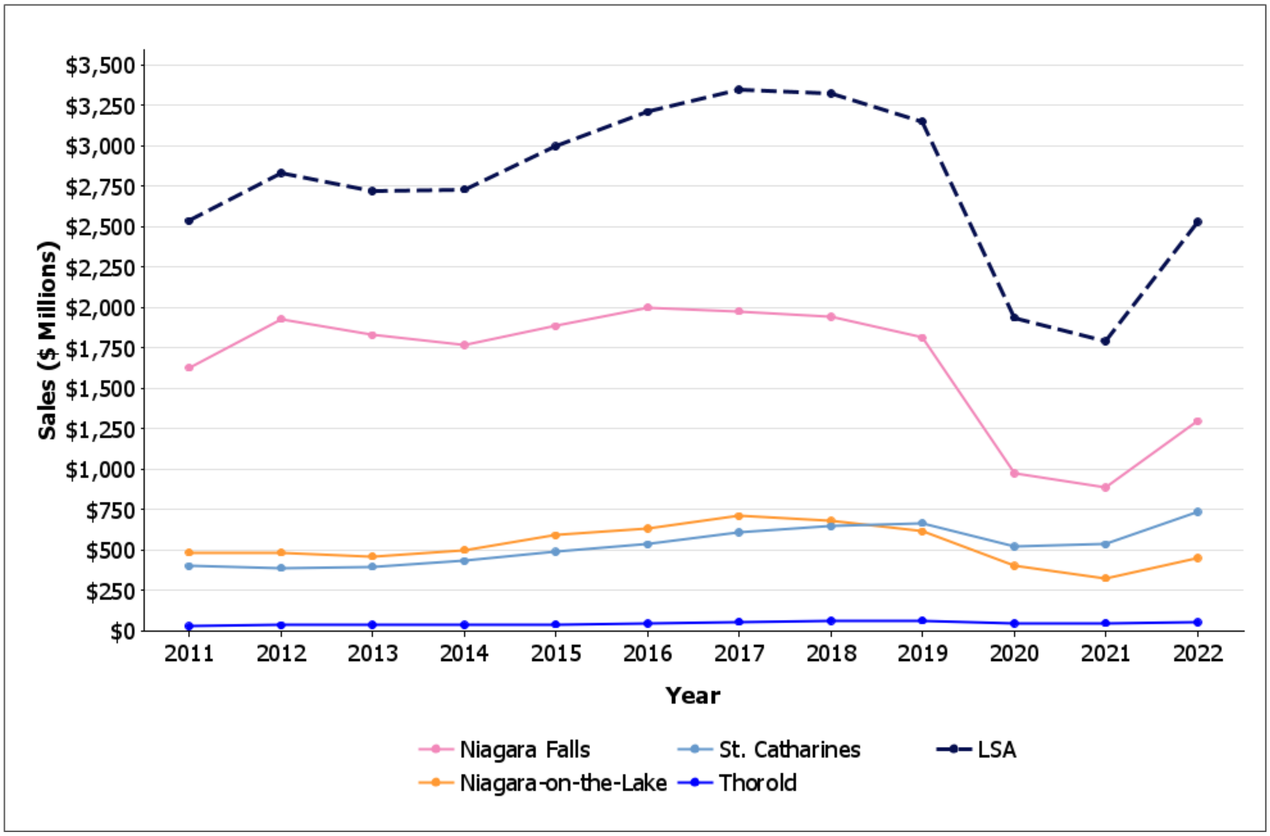
Figure 11 presents total tourism sales within the LSA and its constituent communities from 2011 to 2022. Similar to employment trends, tourism industry sales were significantly impacted by the COVID-19 pandemic, with Niagara Falls being the most affected. By 2022, tourism sales in the LSA had recovered to 80.2% of pre-pandemic (2019) levels, reflecting a loss of $622.4 million.

The post-pandemic (2022) tourism sales as a proportion of pre-pandemic (2019) levels for each LSA community were as follows:

- Niagara Falls: 71.5% (-$516.1 million)
- Niagara-on-the-Lake: 73.5% (-$162.2 million)
- St. Catharines: 110.3% (+$68.2 million)
- Thorold: 80.3% (-$12.3 million)

These figures highlight uneven recovery across communities, with St. Catharines exceeding its pre-pandemic sales while other communities, particularly Niagara Falls, remained significantly below 2019 levels.

Figure 11: LSA Tourism Sector Sales by Community, 2011-2022



Source: (Lightcast, 2024d)

Farms

Farms are integral to the economy of the LSA. The fertile soils and favorable climate of the Niagara Region support diverse agricultural activities, with a focus on fruit cultivation, vineyards, greenhouse production, and specialty crops. Niagara-on-the-Lake is a key hub for vineyards and wineries, producing renowned wines that contribute significantly to agri-tourism. The farm industry in the LSA supports a broader economic ecosystem, including food processing, retail, and hospitality.

Table 24 presents farm industry job growth in the LSA by community from 2018 to 2023, along with average wages. In 2023, the distribution of farm jobs within the LSA was as follows:

- Niagara Falls: 8.0%
- Niagara-on-the-Lake: 54.9%
- St. Catharines: 35.2%
- Thorold: 2.5%

Between 2018 and 2023, farm jobs in the LSA declined by 18.6%, decreasing from 1,990 to 1,620—a loss of 370 jobs. The percentage decline was most pronounced in Thorold (-50.0%), followed by Niagara-on-the-Lake (-23.9%), Niagara Falls (-7.1%), and St. Catharines (-3.4%). Niagara-on-the-Lake experienced the largest reduction in absolute terms, shedding 280 farm jobs, dropping from 1,170 in 2018 to 890 in 2023.

In 2023, the farm industry accounted for about 1.2% of total jobs within the LSA. Amongst the constituent communities, farms accounted for the highest percentage of total jobs in Niagara-on-the-Lake (6.4%), and less than 1% of total jobs within the other communities.

Table 24: LSA Farm Industry Jobs and Average Wages, 2018-2023

Study Area	2018 Jobs	2023 Jobs	Change	% Change	2023 Average Wages
Niagara Falls	140	130	-10	-7.1%	$37,000
Niagara-on-the-Lake	1,170	890	-280	-23.9%	$37,000
St. Catharines	590	570	-20	-3.4%	$37,000
Thorold	80	30	-50	-50.0%	$37,000
Total LSA	1,990	1,620	-370	-18.6%	$37,000

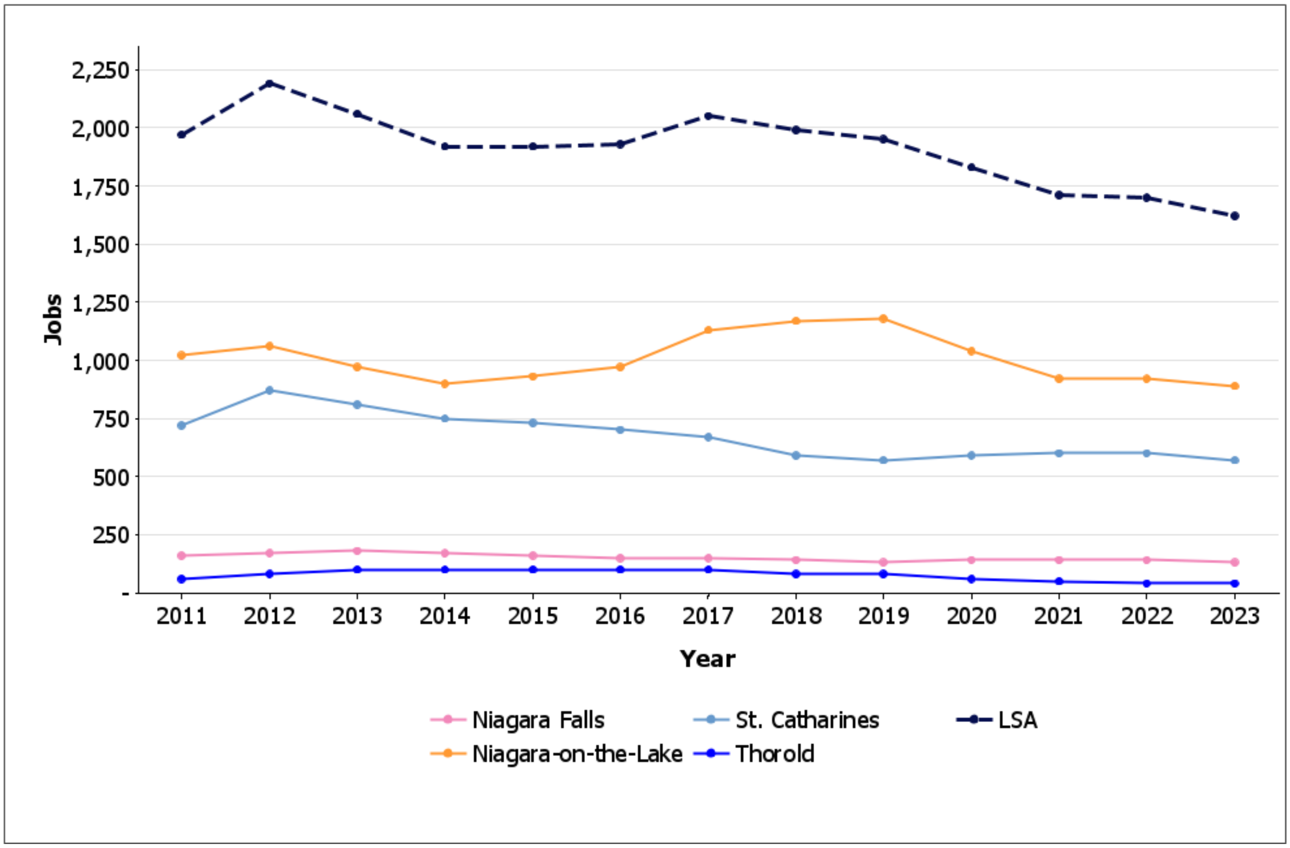
Source: (Lightcast, 2024c)
Note: Total LSA jobs may not equal the sum of individual community jobs due to rounding.

Figure 12 presents farm industry jobs in the LSA by community from 2011 to 2023. With the exception of Niagara-on-the-Lake, farm jobs in the LSA communities have followed a general pattern of decline. In Niagara-on-the-Lake, job numbers have oscillated between approximately

1,180 and 890 during this period. By 2023, total farm jobs in the LSA had decreased by 17.8% (-350) compared to 2011.

The COVID-19 pandemic exacerbated existing labour shortages in Canada's agricultural sector, including the Niagara region. The farm industry in Niagara Region is highly reliant on temporary foreign workers (TFWs), many of whom come from Mexico (Migrant Farmworkers Project: Anglican Diocese of Niagara, n.d.). Travel restrictions and border closures implemented as result of pandemic disrupted the flow of TFWs to Canada. The Canadian Agriculture Human Resource Council (CAHRC) reported that 41% of agricultural employers struggled to find sufficient employees, with 86% attributing this directly to COVID-19 (2021). The delayed arrival or absence of TFWs in 2020 forced many farm employers to urgently seek local labour to complete the planting and harvesting of spring crops. Based on survey work undertaken by the CAHRC, it was estimated that agricultural employers were unable to fill around one in five TFWs they were seeking to employ because of COVID-19, with many of the employers citing difficulties getting TFWs across the border (Canadian Agricultural Human Resource Council, 2021). The challenges of getting TFWs across the border remained an issue in 2021 (Raay, 2021).

Figure 12: LSA Farm Industry Jobs by Community, 2011-2023



Source: (Lightcast, 2024c)

Table 25 presents 2022 farm sales in the LSA by community. In 2022 total farm sales within the LSA amounted to approximately $1.212 billion, representing 4.1% of total industry sales. Niagara-on-the-Lake was the largest contributor accounting for 57.8% of total farm sales in the LSA. St. Catherines was the second largest contributor at 36.1%, followed Niagara Falls (5.9%), and lastly Thorold whose contribution was minimal (0.9%).

Table 25: LSA Farm Industry Sales by Community, 2022

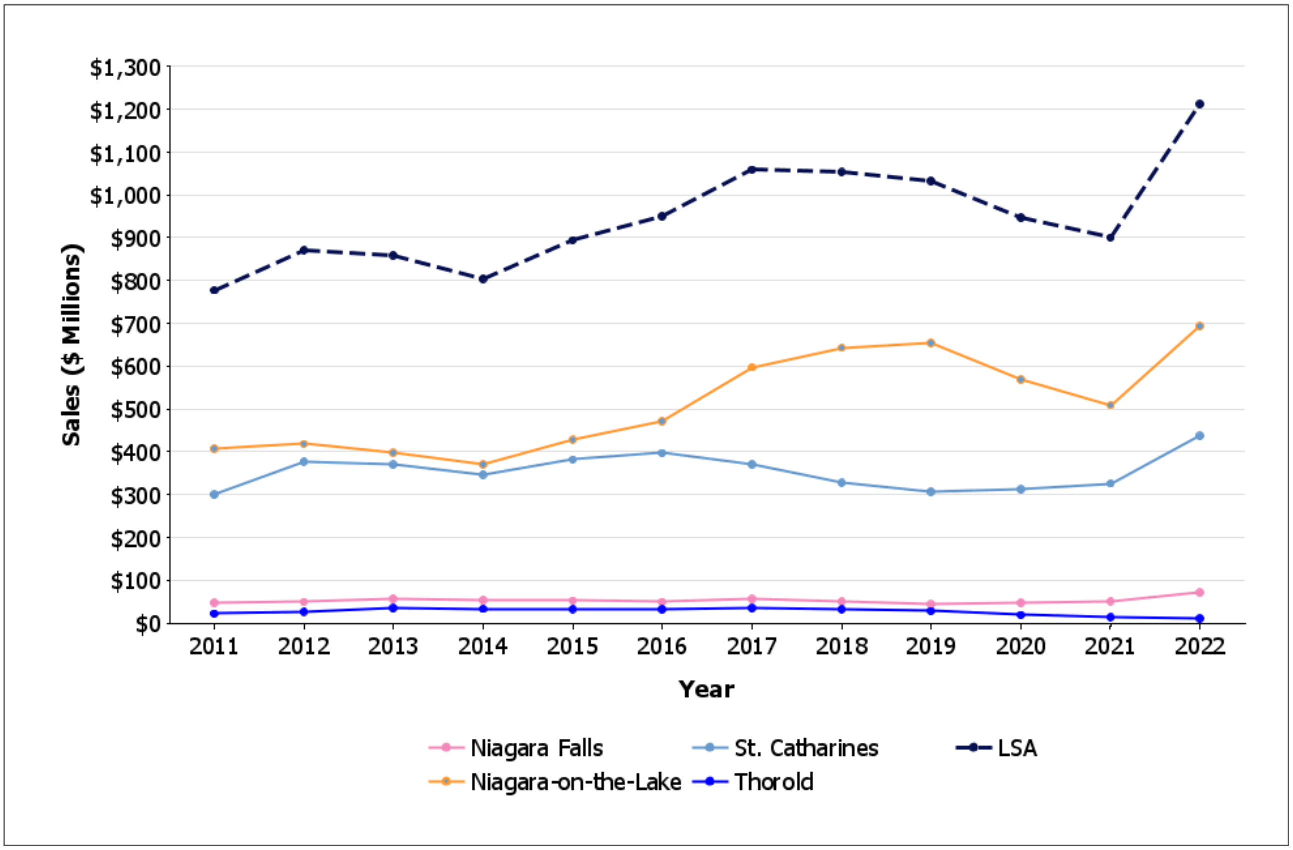
Community	Sales	Distribution
Niagara Falls	$71,142,000	5.9%
Niagara-on-the-Lake	$693,242,000	57.2%
St. Catharines	$437,175,000	36.1%
Thorold	$10,854,000	0.9%
Total LSA	$1,212,413,000	100%

Source: (Lightcast, 2024d)

Figure 13 presents farm sales for each LSA community from 2011 to 2022. The LSA exhibited oscillating growth throughout the period, largely driven by farm sales activity in Niagara-on-the-Lake. By 2022, total farm sales in the LSA had increased by 56.0% ($435 million) compared to 2011.

In 2022, all LSA communities except Thorold experienced significant sales growth over the previous year. Between 2021 and 2022, Niagara Falls recorded the highest percentage growth (39.0%, $20 million), followed by Niagara-on-the-Lake (36.2%, $184 million) and St. Catharines (34.0%, $111 million). Conversely, farm sales in Thorold declined by 18.2% (-$2.5 million) during the same period.

Figure 13: LSA Farm Industry Sales by Community, 2011-2022



Source: (Lightcast, 2024d)

4.1.3.2 RSA

Table 26 presents a comparison of jobs by industry at the 2-digit NAICS level for the LSA and RSA in 2023. Similar to the LSA, the top five industries that account for over 50% of jobs in the RSA were:

- Health care and social assistance 13.3%
- Retail trade 11.8%
- Accommodation and food services 9.7%
- Manufacturing 8.3%
- Construction 7.8%

The differences between the LSA and RSA regarding the top industries were minor and related to the proportion of jobs and their ranking order.

Table 26: LSA and RSA Jobs by Industry, 2-Digit NAICS, 2023

Industry	LSA	RSA
11 Agriculture, forestry, fishing and hunting	1,640	5,110
21 Mining, quarrying, and oil and gas extraction	140	380
22 Utilities	1,020	1,350
23 Construction	10,100	18,030
31-33 Manufacturing	9,370	18,980
41 Wholesale trade	5,500	9,450
44-45 Retail trade	17,580	27,220
48-49 Transportation and warehousing	6,120	9,720
51 Information and cultural industries	1,340	2,140
52 Finance and insurance	4,520	8,440
53 Real estate and rental and leasing	3,090	4,540
54 Professional, scientific and technical services	8,550	13,700
55 Management of companies and enterprises	330	600
56 Administrative and support, waste management and remediation services	7,430	11,950
61 Educational services	8,990	15,620
62 Health care and social assistance	19,750	30,600
71 Arts, entertainment and recreation	3,830	5,840
72 Accommodation and food services	14,880	22,280
81 Other services (except public administration)	4,800	8,270
91 Public administration	7,690	12,320
X0 Unclassified	2,050	3,430
Total Industry	138,720	229,990

Source: (Lightcast, 2024c)
Note: Total Industry jobs may not equal the sum of individual industry jobs due to rounding.

Table 27 presents job growth by industry at the 2-digit NAICS level in the RSA from 2018 to 2023, along with average wages. During this period, jobs in the RSA increased in 13 of 21 industries, declined in 7, and remained flat in 1. The RSA experienced growth across a broader range of industries compared to the LSA.us

Industries where the RSA saw growth while the LSA experienced declines included:

- Public administration: +6.9% RSA vs. -1.4% LSA
- Manufacturing: +6.6% RSA vs. -2.0% LSA
- Information and cultural industries: +8.1% RSA vs. -3.6% LSA

Conversely, utilities saw strong growth in the LSA (+8.5%) but no growth in the RSA.

The five industries in the RSA with the largest growth from 2018 to 2023 were:

- Management of companies and enterprises: +62.2%
- Finance and insurance: +35.3%
- Real estate and rental and leasing: +29.3%
- Professional, scientific, and technical services: +18.7%
- Transportation and warehousing: +17.1%

Four of these five top-growing industries in the RSA also showed strong growth in the LSA.

The five industries in the RSA with the largest declines during this period were:

- Arts, entertainment, and recreation: -26.7%
- Accommodation and food services: -16.8%
- Other services (except public administration): -12.5%
- Agriculture, forestry, fishing, and hunting: -7.6%
- Administrative and support, waste management, and remediation services: -5.8%

Four of the five top-declining industries in the RSA also mirrored similar trends in the LSA.

Table 27: RSA Jobs and Average Wages by Industry, 2-Digit NAICS, 2018-2023

Industry	2018	2023	Change	% Change	Average Wages
11 Agriculture, forestry, fishing and hunting	5,530	5,110	-420	-7.6%	$37,100
21 Mining, quarrying, and oil and gas extraction	340	380	40	11.8%	$80,800
22 Utilities	1,350	1,350	-	0.0%	$100,300
23 Construction	16,050	18,030	1,980	12.3%	$66,700
31-33 Manufacturing	17,800	18,980	1,180	6.6%	$64,100
41 Wholesale trade	9,050	9,450	400	4.4%	$64,700
44-45 Retail trade	27,720	27,220	-500	-1.8%	$32,200
48-49 Transportation and warehousing	8,300	9,720	1,420	17.1%	$57,000
51 Information and cultural industries	1,980	2,140	160	8.1%	$65,000
52 Finance and insurance	6,240	8,440	2,200	35.3%	$61,200
53 Real estate and rental and leasing	3,510	4,540	1,030	29.3%	$49,100
54 Professional, scientific and technical services	11,540	13,700	2,160	18.7%	$71,000
55 Management of companies and enterprises	370	600	230	62.2%	$72,900
56 Administrative and support, waste management and remediation services	12,690	11,950	-740	-5.8%	$49,000
61 Educational services	14,340	15,620	1,280	8.9%	$63,800
62 Health care and social assistance	26,820	30,600	3,780	14.1%	$49,100
71 Arts, entertainment and recreation	7,970	5,840	-2,130	-26.7%	$31,900
72 Accommodation and food services	26,790	22,280	-4,510	-16.8%	$23,800
81 Other services (except public administration)	9,450	8,270	-1,180	-12.5%	$49,200
91 Public administration	11,530	12,320	790	6.9%	$76,700
X0 Unclassified	3,570	3,430	-140	-3.9%	$64,100
Total Industry	222,920	229,990	7,070	3.2%	$52,200

Source: (Lightcast, 2024c)

Note: Total industry jobs may not equal the sum of individual industry jobs due to rounding.

Table 28 presents 2022 total industry sales for the LSA and RSA. In 2022 total sales in the RSA amounted to $53.415 billion, with the LSA contributing 56.0% of this total.

Table 28: LSA and RSA Total Industry Sales, 2022

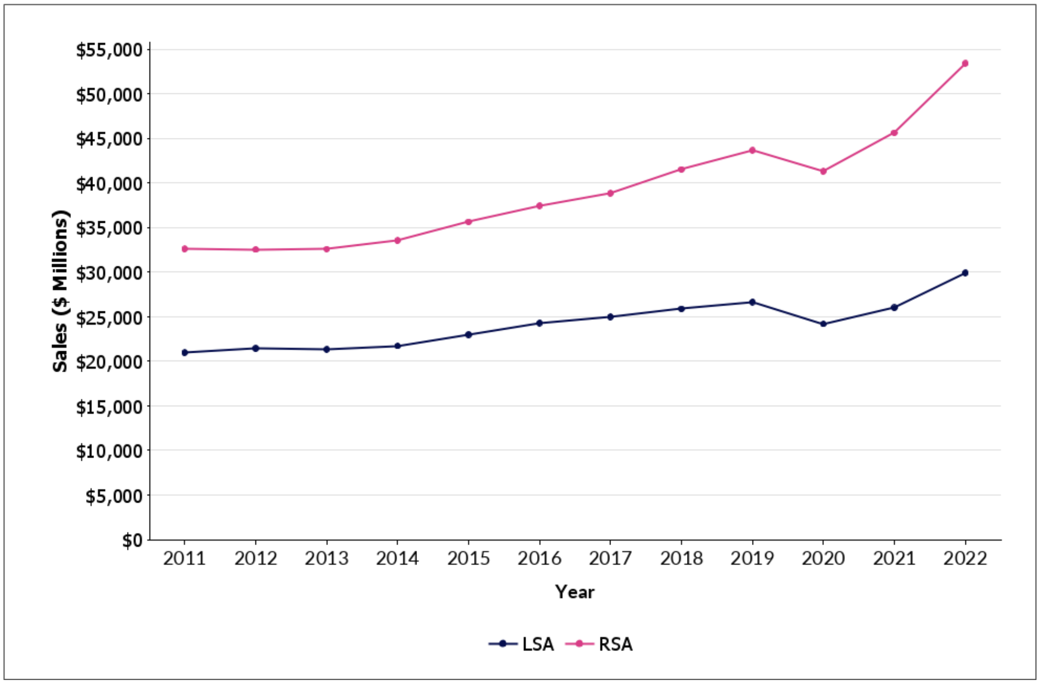
Study Area	Sales	Distribution
LSA	$29,924,250,000	56.0%
RSA	$53,414,913,000	100.0%

Source: (Lightcast, 2024d)

Figure 14 presents total industry sales for the LSA and RSA from 2011 to 2022. Compared to the LSA, the RSA experienced moderately stronger sales growth before the pandemic, less decline during the pandemic in 2020, and a stronger recovery afterward.

Between 2011 and 2019, sales in the RSA increased by 33.9%, 6.8% higher than the LSA's growth of 27.1%. During the pandemic in 2020, RSA sales declined by 5.3%, which was 3.8% less than the LSA's decline of 9.2%. From 2020 to 2022, sales in the RSA rebounded more strongly, increasing by 29.3%, compared to a 23.6% increase in the LSA.

Figure 14: LSA and RSA Total Industry Sales, 2011-2022



Source: (Lightcast, 2024c)

Tourism

Table 29 presents tourism job growth by sector in the RSA from 2018 to 2023, along with average wages. During this period, total tourism jobs in the RSA declined by 26.3%, from 37,990 to 31,790. While jobs decreased in two of the five tourism sectors, three sectors experienced growth, indicating broader sectoral resilience in the RSA compared to the LSA.

The overall decline in tourism jobs was primarily driven by reductions in accommodation and hospitality (-4,590 jobs) and arts, entertainment, and recreation (-2,130 jobs). The percentage declines in these sectors were less pronounced in the RSA compared to the LSA:

- Arts, Entertainment, and Recreation -26.8% RSA vs. -37.2% LSA
- Accommodation and Hospitality -17.3% RSA vs. -28.3% LSA

The tourism industry sectors that saw increase in the RSA were:

- Transportation +45.1% RSA vs 64.1% LSA
- Travel Arrangement and Reservation Services +8.9% RSA vs. -3.0% LSA
- Beverage Manufacturing 3.4% RSA vs. 4.5% LSA

Table 29: RSA Tourism Industry Sector Jobs and Average Wages, 2018-2023

Tourism Sector	2018 Jobs	2023 Jobs	Change	% Change	2023 Average Wages
Accommodation and Hospitality	26,600	22,010	-4,590	-17.3%	$23,700
Arts, Entertainment, and Recreation	7,960	5,830	-2,130	-26.8%	$35,700
Transportation	910	1,320	410	45.1%	$45,600
Travel Arrangement and Reservation Services	450	490	40	8.9%	$53,700
Beverage Manufacturing	2,070	2,140	70	3.4%	$48,600
Total Tourism	37,990	31,790	-6,200	-16.3%	$24,800

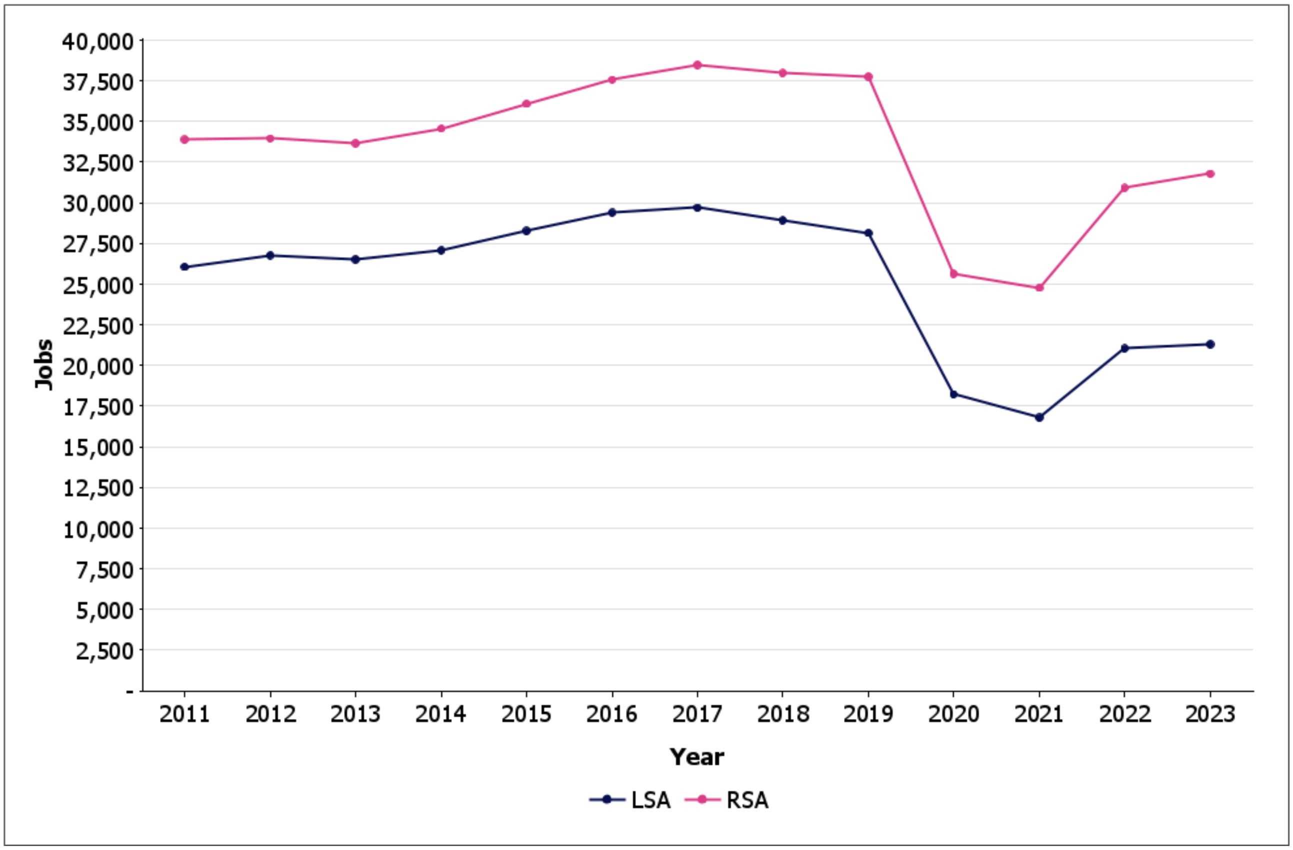
Source: (Lightcast, 2024c)
Note: Total tourism jobs may not equal the sum of individual sector jobs due to rounding.

Figure 15 presents total tourism sector jobs in the LSA and RSA from 2011 to 2022. While tourism job growth trends in the RSA generally mirrored those of the LSA, the RSA exhibited greater resilience to decline compared to the LSA and slightly improved recovery.

Between 2011 and 2017, tourism jobs increased by 13.6% in the RSA, closely aligning with the LSA's growth of 13.9%. From 2017 to 2019, tourism jobs in the RSA declined by 1.9%, which was 3.4% less than the LSA's decline of 5.3%.

During the initial pandemic, the RSA showed greater resilience, with tourism jobs by 2021 declining 34.4% from pre-pandemic (2019) levels compared to a 40.4% decline in the LSA, a difference of 6.0%. Between 2021 and 2023, tourism jobs in the RSA recovered by 28.3%, slightly outpacing the LSA's recovery of 27.1%.

Figure 15: LSA and RSA Total Tourism Sector Jobs, 2011-2023



Source: (Lightcast, 2024c)

Table 30 presents tourism sector sales for the LSA and RSA in 2022. That year, total tourism sales in the RSA amounted to $3.572 billion, with the LSA contributing 67.0% of this total.

Table 30: LSA and RSA Tourism Sector Sales, 2022

Tourism Sectors	LSA	RSA
Accommodation and Hospitality	$1,478,882,000	$2,041,013,000
Arts, Entertainment, and Recreation	$388,311,000	$545,292,000
Transportation	$96,622,000	$138,797,000
Travel arrangement and reservation services	$20,882,000	$39,745,000
Beverage manufacturing	$543,098,000	$807,020,000
Total	$2,527,795,000	$3,571,867,000

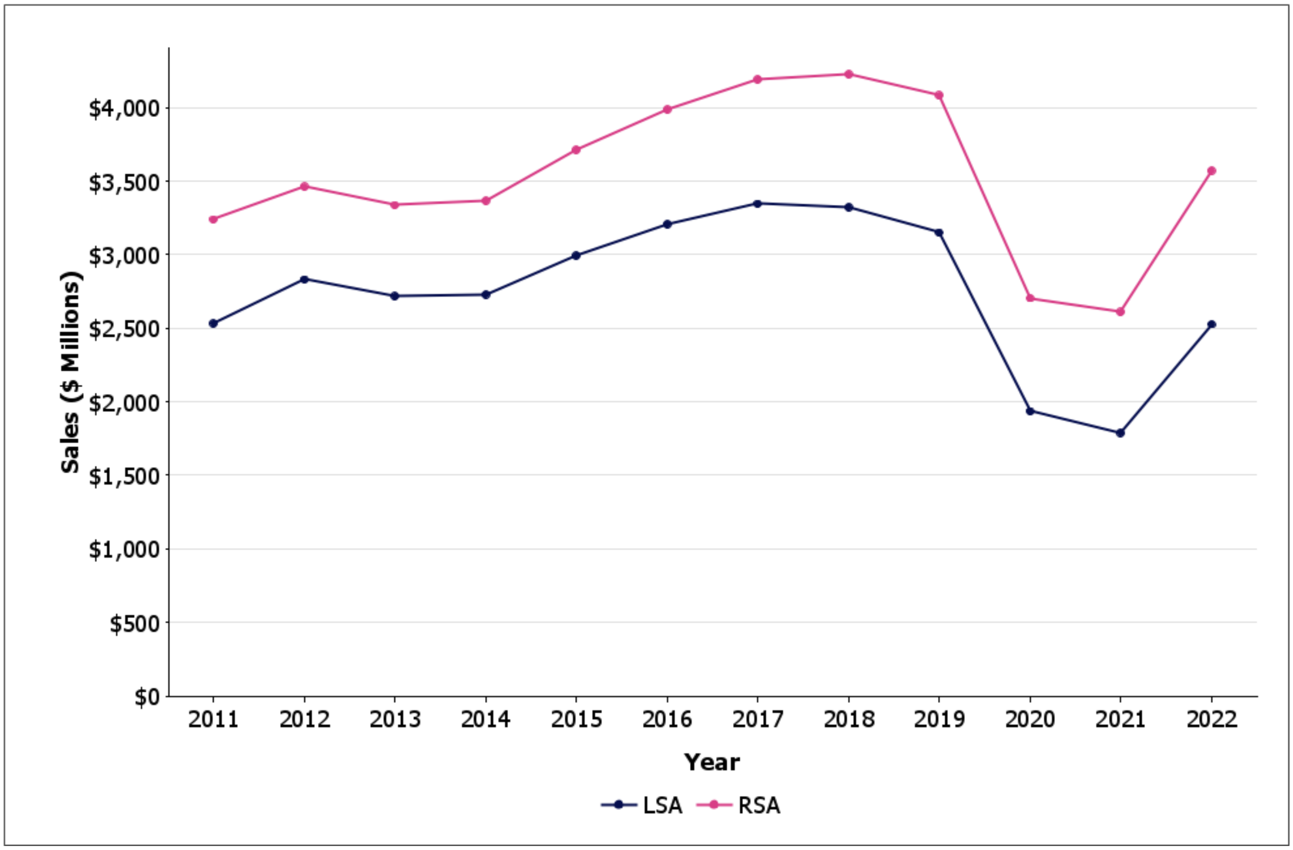
Source: (Lightcast, 2024d)
Note: Total tourism sales may not equal the sum of individual sector sales due to rounding.

Figure 16 presents tourism sales in the LSA and RSA from 2011 to 2022. While tourism sales trends in the RSA generally mirrored those of the LSA, the RSA exhibited slightly slower growth, greater resilience to declines, and a slower recovery.

Between 2011 and 2017, tourism sales in the RSA increased by 29.4%, 2.7% less than the LSA's growth of 32.1%. From 2017 to 2019, RSA tourism sales declined by 2.6%, compared to a 5.9% decline in the LSA, a difference of 3.3%.

During the initial pandemic, the RSA demonstrated greater resilience, with tourism sales falling 36.1% from pre-pandemic (2019) levels, compared to a 43.2% decline in the LSA, a difference of 7.1%. Between 2021 and 2022, tourism sales in the RSA recovered by 36.8%, 4.4% less than the LSA's recovery of 41.3%.

Figure 16: LSA and RSA, Tourism Sector Sales, 2011-2022



Source: (Lightcast, 2024d)

Farms

Table 31 presents farm industry job growth in the LSA and RSA from 2018 to 2023, along with average wages. In 2023, the RSA had a total of 5,040 farm industry jobs, with the LSA accounting for 36.6% of this total.

Between 2018 and 2023, farm jobs in the RSA declined by 7.4%, decreasing from 5,440 to 5,040, a loss of 400 jobs. The majority of this decline occurred in the LSA, which accounted for 370 of the 400 lost jobs.

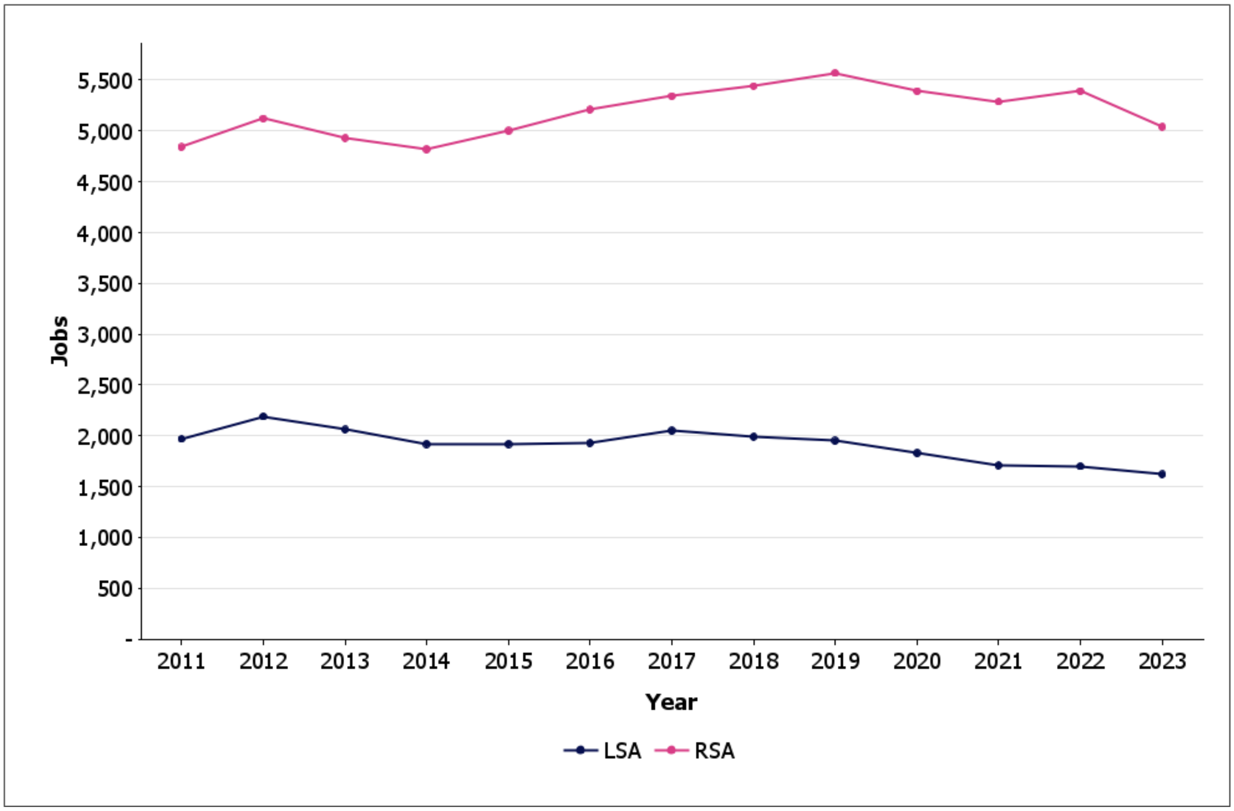
Table 31: LSA and RSA Farm Industry Jobs and Average Wages, 2018-2023

Study Area	2018 Jobs	2023 Jobs	Change	% Change	2023 Average Wages
LSA	1,990	1,620	-370	-18.6%	$37,000
RSA	5,440	5,040	-400	-7.4%	$37,000

Source: (Lightcast, 2024c)

Figure 17 presents the farm jobs associated with the LSA and RSA over the period 2011 to 2022. Unlike the LSA which shows a general trend of decline since 2012, the RSA demonstrated growth over the period 2014 to 2019 followed by a general pattern of decline thereafter. Since 2019 the decline in farm jobs in the LSA generally mirrors the same trends as the RSA however the percentage decrease in the LSA is proportionally greater.

Figure 17: LSA and RSA Farm Industry Jobs, 2011-2023



Source: (Lightcast, 2024c)

Table 32 presents total farm industry sales for the LSA and RSA in 2022. That year, total sales in the RSA amounted to $3.586 billion, with the LSA contributing 33.8% of this total.

Table 32: LSA and RSA Farm Industry Sales, 2022

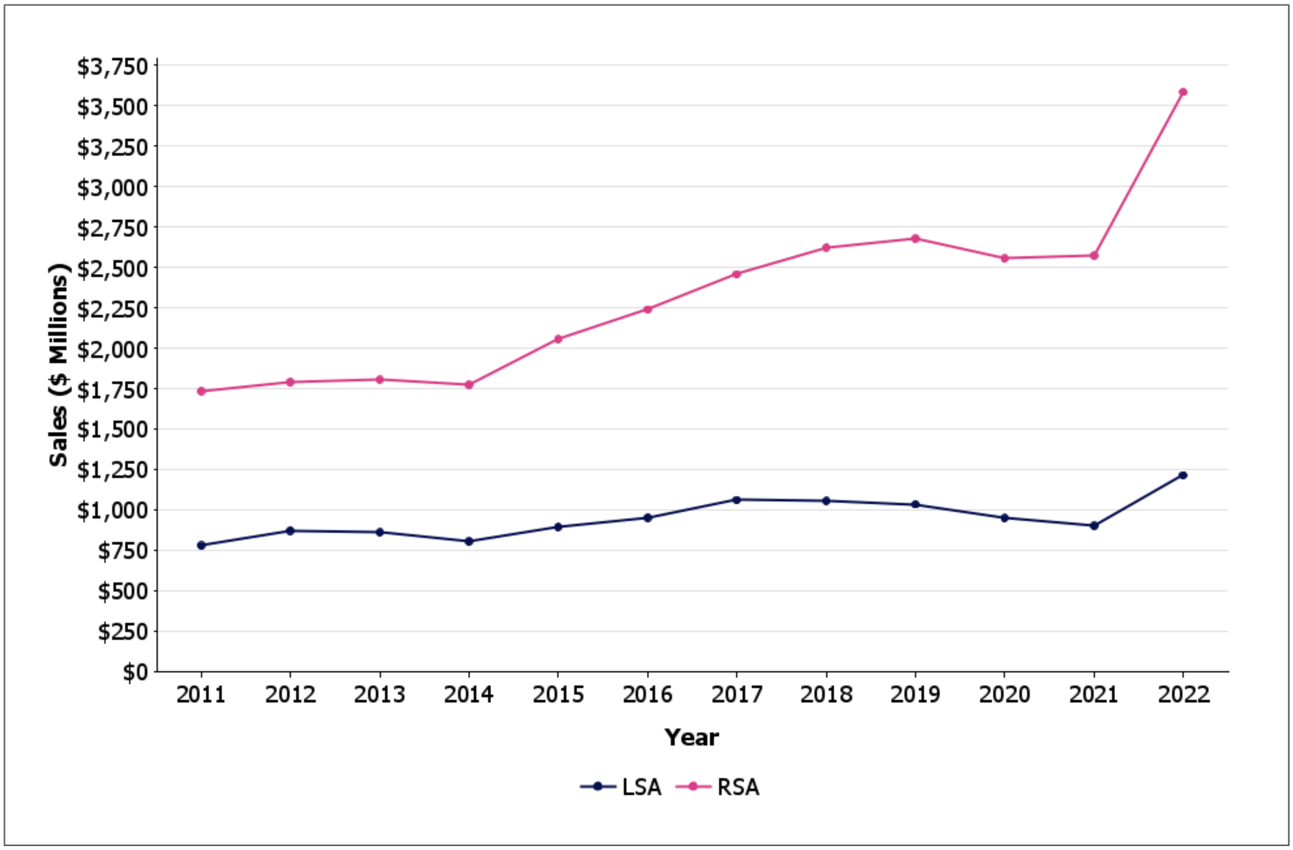
Study Area	Sales	Distribution
LSA	$1,212,413,000	33.8%
RSA	$3,586,534,000	100%

Source: (Lightcast, 2024d)

Figure 18 presents total farm industry sales in the LSA and RSA from 2011 to 2022. Compared to the LSA, the RSA experienced significantly greater sales growth leading up to the pandemic, a smaller decline during the initial pandemic years (2020–2021), and a stronger recovery.

Between 2011 and 2019, farm sales in the RSA increased by 54.5%, 21.6% higher than the LSA's growth of 32.9%. By 2021, RSA farm sales had declined by 4.0% from pre-pandemic (2019) levels, 8.9% less than the LSA's decline of 12.9%. From 2021 to 2022, RSA farm sales grew by 39.4%, outpacing the LSA's growth of 34.7% by 4.7%.

Figure 18: LSA and RSA Farm Industry Sales, 2011-2022



Source: (Lightcast, 2024d)

4.1.4 Gross Domestic Product (GDP)

This section explores GDP trends within the LSA and RSA, focusing on economic contributions, growth dynamics, and regional relationships. In 2023, the LSA generated a total GDP of $14.533 billion. St. Catharines emerged as the largest economic contributor within the LSA, accounting for $7.348 billion (50.6%) of the total GDP. Niagara Falls followed with $4.671 billion (32.1%), while Niagara-on-the-Lake and Thorold contributed $1.439 billion (9.9%) and $1.075 billion (7.4%), respectively. Combined, St. Catharines and Niagara Falls represented 82.7% of the LSA's economic activity, underscoring their critical roles in driving the regional economy.

From 2020 to 2023, the LSA's GDP grew by $1.590 billion, a 12.3% increase, though growth varied significantly across municipalities. Niagara-on-the-Lake experienced the highest growth rate, increasing by $253 million (21.3%), while Niagara Falls grew by $703 million (17.7%), reflecting the post-pandemic recovery of its tourism sector. St. Catharines, the LSA's economic hub, showed steady growth of $686 million (10.3%). However, Thorold saw a GDP decline of $51 million (-4.6%), highlighting economic challenges unique to the municipality.

The RSA, represented by the St. Catharines–Niagara CMA for this analysis, reported a total GDP of $21.673 billion in 2023. The LSA contributed $14.533 billion, or 67.1% of the CMA's GDP, emphasizing its significance as a key economic driver within the broader region. Between 2020 and 2023, the CMA's GDP grew by $2.667 billion (14.0%), outpacing the LSA's estimated growth rate of 12.3%.

Walker plays a pivotal role in bolstering the regional economy, contributing an estimated $24.7 million annually to the GDP to the Province and supporting approximately 245 full-time equivalent jobs through operation of the landfill, enabled ancillary activities, and host fees. These activities generate direct, indirect, and induced impacts, benefiting local businesses and services while stabilizing employment and contributing to long-term economic vitality in the region.

4.1.4.1 Walker

Walker's operation of the South Landfill enables for ancillary activities on campus likely would not exist without the continued operation landfill, including: Niagara RNG facility, RRA, biosolids facility as well as Niagara Grinding (off-campus wood grinding), and Woodington (trucking waste and recyclables from Burlington transfer station). The continued operation of the landfill, associated ancillary activities, and host fees provide substantial economic benefits to Niagara Region and the Province of Ontario. These ongoing activities are estimated to contribute $24.7 million in GDP and $15.3 million in labour income annually to the province (in 2023 dollars) (Avaanz Ltd., 2022) (Statistics Canada, 2024c). The operations also support approximately 245 full-time equivalent (FTE) jobs each year, providing stable employment for the local workforce and bolstering the regional economy.

The economic benefits are widespread, comprising direct, indirect, and induced impacts. Direct impacts arise from Walker's staff and immediate operational spending, while indirect impacts come from supply chain services that support these operations. Induced impacts are generated through household spending by employees, further benefiting local businesses such as retail, dining, and personal services.

Overall, Walker's existing operations create a reliable and consistent economic stimulus for the Niagara Region, strengthening local employment, supporting municipal services, and contributing to regional growth. These activities play a key role in sustaining the economic vitality of the area.

4.1.4.2 LSA

Table 33 and **Figure 19** present the 2023 estimated GDP at basic prices for each community within the LSA. The total GDP for the LSA in 2023 was estimated to be $14.533 billion.

St. Catharines is the largest contributor to the regional economy, generating $7.348 billion, or 50.6% of the total GDP. Niagara Falls ranks second, contributing $4.671 billion, or 32.1% of the total. The smaller municipalities, Niagara-on-the-Lake and Thorold, collectively account for $2.514 billion, representing 17.3% of the LSA's GDP.

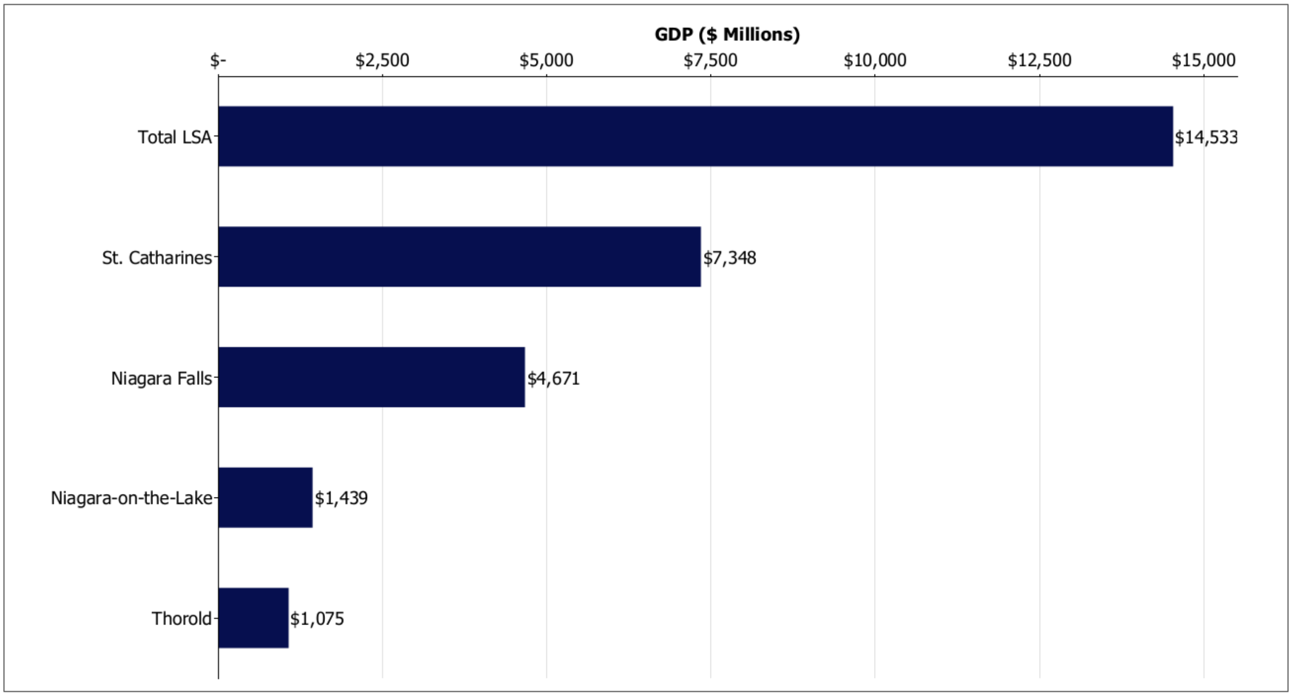
These figures highlight the economic distribution within the LSA, with the majority (82.7%) of economic activity concentrated in St. Catharines and Niagara Falls.

Table 33: LSA GDP at Basic Prices by Community, 2023

Community	GDP ($ Millions)	Distribution
Niagara Falls	$4,671	32.1%
Niagara-on-the-Lake	$1,439	9.9%
St. Catharines	$7,348	50.6%
Thorold	$1,075	7.4%
Total LSA	$14,533	100.0%

Source: (Avaanz Ltd., 2024a)

Figure 19: LSA GDP at Basic Prices by Community, 2023



Source: (Avaanz Ltd., 2024a)

Table 34 highlights GDP changes in the LSA and its four contributing communities between 2020 and 2023, expressed in 2023 dollars. Over this period, the total GDP of the LSA grew by $1.590 billion, an overall increase of 12.3%. However, growth varied significantly across the municipalities, reflecting diverse economic trajectories.

Niagara-on-the-Lake experienced the most robust growth, with GDP increasing by $253 million (21.3%), demonstrating strong economic performance. Niagara Falls also saw substantial growth of $703 million (17.7%), driven by the recovery of its tourism industry following the COVID-19 pandemic. St. Catharines, the largest economic contributor in the LSA, reported steady growth of $686 million (10.3%).

In contrast, Thorold was the only municipality to experience a decline, with GDP contracting by $51 million (-4.6%), indicating challenges in maintaining its economic output. These trends underscore the varied economic dynamics within the LSA.

Table 34: LSA GDP at Basic Prices by Community (2023 $ Millions), 2020-2023

Community	2020	2023	Change	% Change
Niagara Falls	$3,968	$4,671	$703	17.7%
Niagara-on-the-Lake	$1,186	$1,439	$253	21.3%
St. Catharines	$6,662	$7,348	$686	10.3%
Thorold	$1,126	$1,075	$-51	-4.6%
Total LSA	$12,943	$14,533	$1,590	12.3%

Source: (Avaanz Ltd., 2024a)

4.1.4.3 RSA

The following GDP analysis uses the CMA as a proxy for the RSA in the absence of data at the census division level. **Table 35** and **Figure 20** highlight the economic relationship between the LSA and St. Catharines – Niagara CMA in 2023. The CMA had a total GDP of $21.673 billion. This encompasses the majority of the RSA's population and economic activity, excluding Grimsby and West Lincoln.

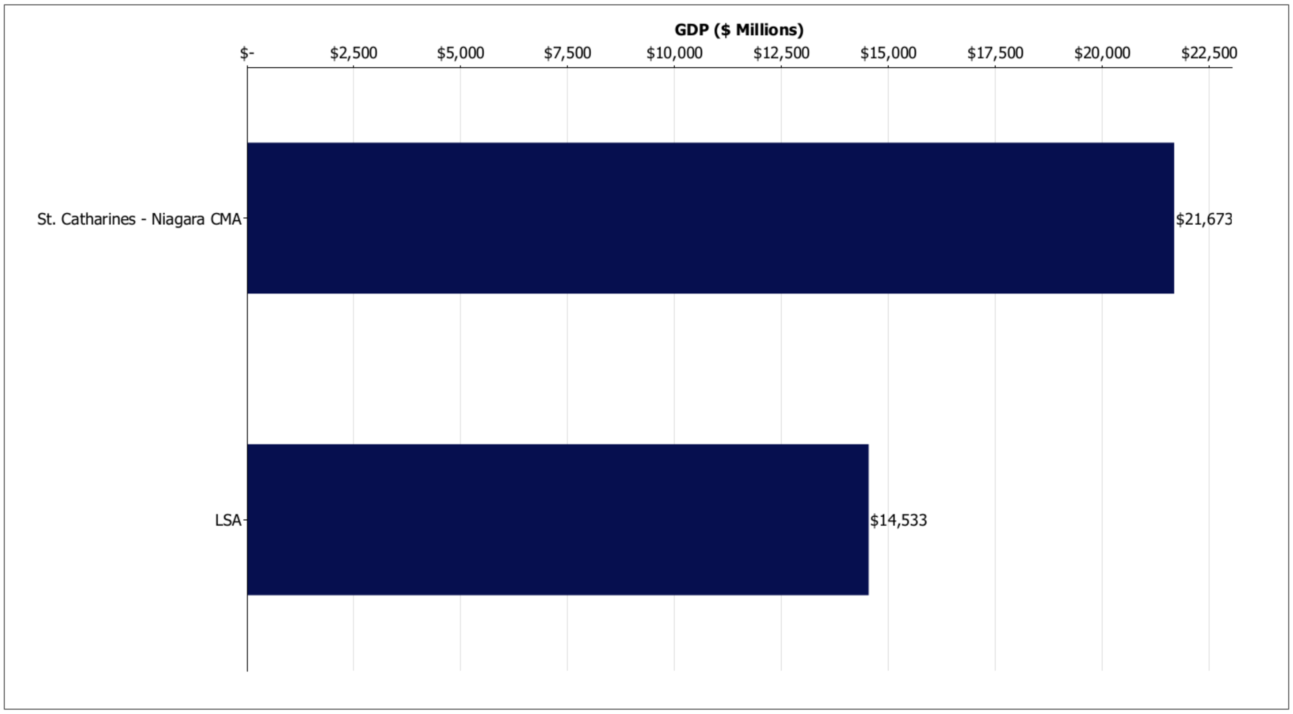
The LSA contributed an estimated $14.533 billion, representing 67.1% of the CMA's GDP. This substantial contribution highlights the LSA's pivotal role as a key economic driver within the broader regional economy.

Table 35: LSA and St. Catherines – Niagara CMA GDP at Basic Prices, 2023

Area	GDP ($ Millions)	Distribution
LSA	$14,533	67.1%
St. Catharines - Niagara CMA	$21,673	100.0%

Source: (Avaanz Ltd., 2024a)

Figure 20: LSA and St. Catherines – Niagara CMA GDP at Basic Prices, 2023



Source: (Avaanz Ltd., 2024a)

Table 36 presents GDP changes from 2020 to 2023 for the LSA and the broader St. Catharines–Niagara CMA, expressed in 2023 dollars. Both regions experienced economic growth during this period, albeit at different rates.

The St. Catharines–Niagara CMA's GDP increased by $2.667 billion, a robust growth rate of 14.0%, underscoring strong economic expansion across the metropolitan area. In comparison, the LSA's GDP grew by $1.590 billion, a 12.3% increase. While positive, the LSA's slightly slower growth highlights variability in economic dynamics within the broader region.

Table 36: LSA and St. Catharines – Niagara CMA GDP at Basic Prices (2023 $ Millions), 2020-2023

Area	2020	2023	Change	% Change
Total LSA	$12,943	$14,533	$1,590	12.3%
St. Catharines - Niagara CMA	$19,006	$21,673	$2,667	14.0%

Source: (Avaanz Ltd., 2024a)

4.2 Real Estate

This section describes residential patterns and real estate market trends near the proposed landfill expansion site and within broader regional contexts. The proposed landfill expansion site is within proximity residential properties identified across three zones within 500m; 500m-1000m; and 1000m-2000m. Within 500m, there are seven properties with residences, including four bisected by the 500m isoline. In the 500m-1000m zone, there are 28 properties with residences, with two bisected by the 1000m isoline. The 1000m-2000m zone contains 296 properties with residences including nine properties bisected by the 2000m isoline, plus a multi-residential condominium building.

In the LSA, detached home sales rose steadily from 2018 to 2021, peaking with a 43.0% increase before declining by 44.8% from 2021 to 2023. Niagara-on-the-Lake led in both growth and decline, while St. Catharines consistently had the largest share of sales. Average home prices followed a similar pattern, increasing by 86.2% from 2018 to 2022 before dropping by 10.9% in 2023. Market dynamics showed St. Catharines had the shortest days on market, while Niagara-on-the-Lake experienced significantly longer durations.

The RSA exhibited similar trends but showed stronger growth and greater resilience to declines, with a 53.0% rise in sales from 2018 to 2021, followed by a 41.3% drop by 2023. RSA properties consistently had slightly longer days on market compared to the LSA.

Fluctuations in the Bank of Canada’s interest rates from 2018 to 2024 influenced the housing market. Low rates during the COVID-19 pandemic fueled demand and price growth, while rapid rate hikes from 2022 to 2023 curbed affordability, leading to market contraction. In 2024, the Bank of Canada introduced a series of interest rate cuts that are expected to bring back activity into the real estate market.

4.2.1 Within Vicinity of the Proposed Site

Within 500m of the proposed landfill expansion site there are seven properties with existing homes. Three residences are within 500m and four residences are located on properties bisected by the 500m isoline. Two residences within 500m, north of the proposed site, are on lands owned by Walker. One residence to the north is on a property bisected by the 500m isoline. East of the proposed site along Garner Rd. one residence is within 500m, and another three residences are on properties bisected by 500m isoline.

In the zone between 500m and 1000m of the proposed site, there are another 28 properties with existing homes (excluding those counted bisecting the previous zone). Within this zone, east-southeast of the site along Garner Rd. there are 20 residences within the 500m-1000m zone, and 2 residences are located on properties bisected by the 1000m isoline. South of the site, there are another 3 residences within the 1000m isoline, and another single residence within 1000m on Walker owned lands southwest of the site. North of the site, there is one residence within 1000m, and one farm property bisected by the 1000m isoline with residence.

In the zone between 1000m and 2000m of the proposed site, there are 296 properties with existing homes (excluding those counted bisecting the previous zone) plus a multi-residential condominium building. Two hundred eighty seven of the residences and the multi-residential condo are within the 1000m-2000m zone and 9 residences are located on properties bisected the 2000m isoline. The majority of residences within the 1000m-2000m zone are located east-southeast of the site.

4.2.2 LSA

Real estate data was collected for each community within the LSA, focusing on annual trends for detached home sales from 2018 to 2023. Detached homes accounted for approximately one-quarter of total residential sales activity in the LSA during this period.

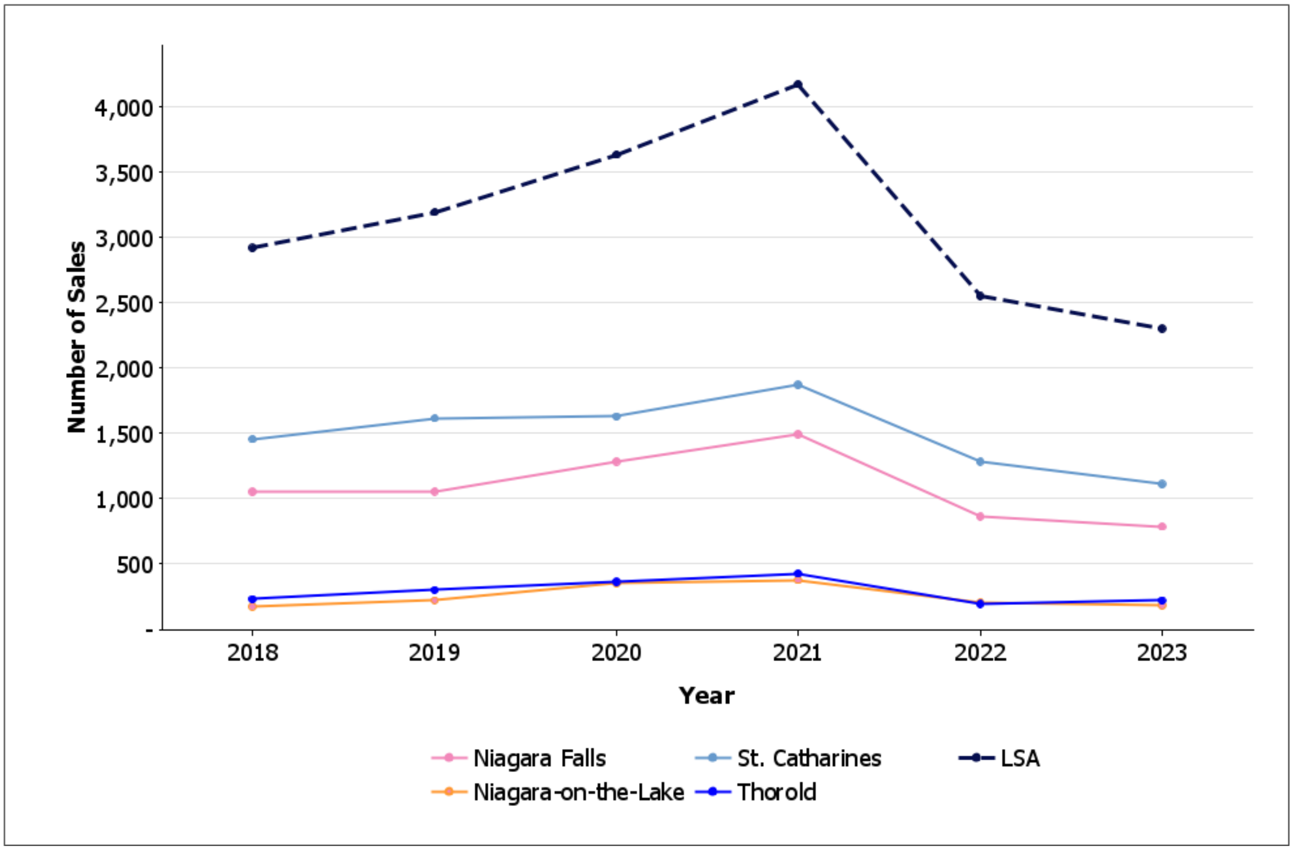
Figure 21 presents the number of detached home sales in the LSA by community. Annual sales increased steadily, peaking in 2021 before a sharp decline in 2022, which continued more gradually into 2023. The distribution of total annual sales within the LSA by community over the forecast period fell within the following ranges:

- Niagara Falls: 33.1% to 36.1%
- Niagara-on-the-Lake: 6.1% to 9.8%
- St. Catharines: 44.8% to 50.6%
- Thorold: 7.6% to 10.3%

Between 2018 and 2021, the annual number of units sold in the LSA increased by 43.0% (1,256 units), rising from 2,921 to 4,177 units. Niagara-on-the-Lake experienced the strongest growth during this period (113.6%), followed by Thorold (86.5%), Niagara Falls (41.8%), and St. Catharines (28.4%).

From 2021 to 2023, annual sales in the LSA declined by 44.8% (-1,873 units), falling from 4,177 to 2,304 units. Niagara-on-the-Lake experienced the largest decline (-51.6%), followed by Thorold (-48.5%), Niagara Falls (-47.3%), and St. Catharines (-40.7%).

Figure 21: LSA Detached Home Sales, 2018-2023

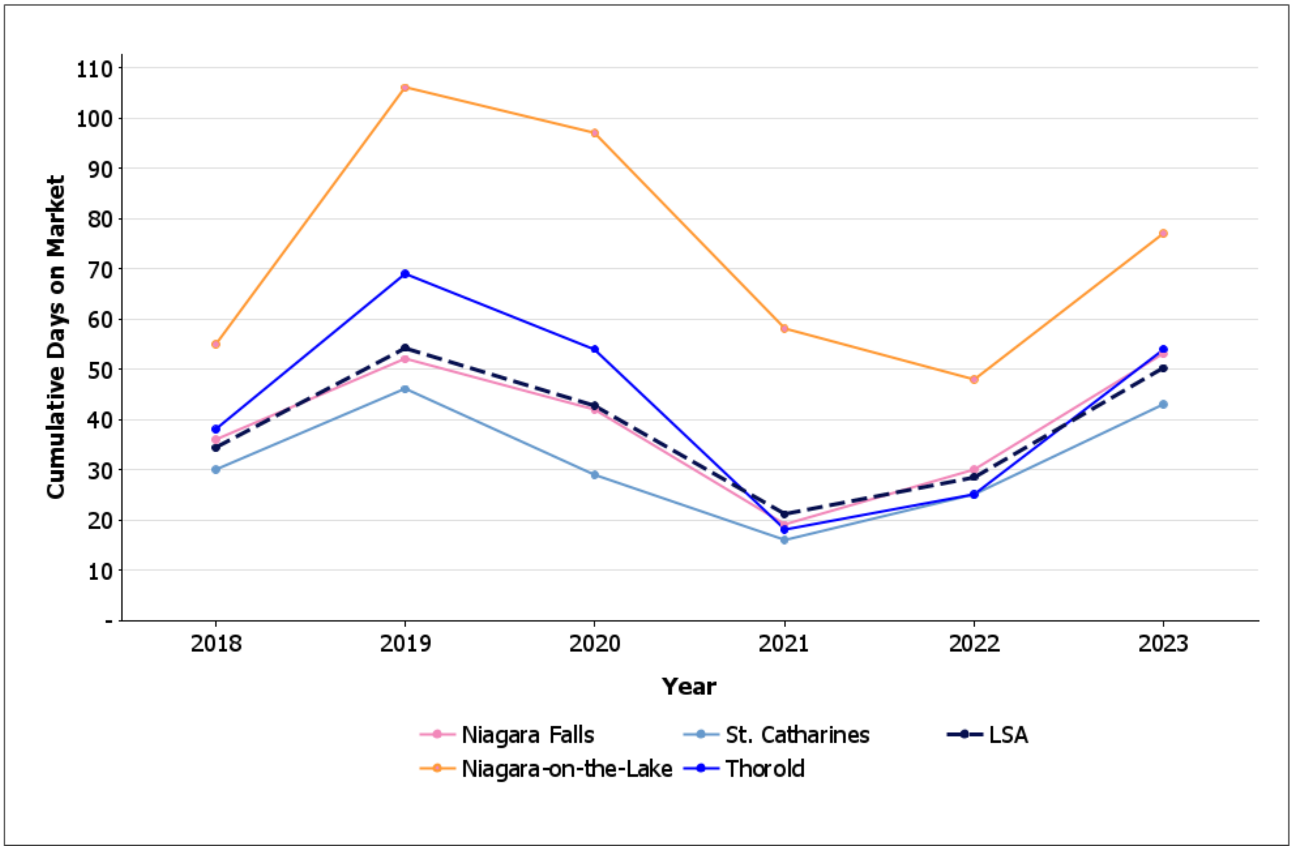


Source: (Avaanz Ltd., 2024a) (McGarr Realty Corp., 2019) (McGarr Realty Corp., 2020) (McGarr Realty Corp., 2021) (McGarr Realty Corp., 2022) (McGarr Realty Corp., 2023) (McGarr Realty Corp., 2024)

Figure 22 presents cumulative days on market for detached homes in the LSA by community from 2018 to 2023. During this period, the cumulative days on market for the LSA as a whole fluctuated between 21 and 50 days, peaking in 2019, dropping to a low in 2021, and rising again toward the upper range by 2023.

Among the LSA communities, St. Catharines consistently had the lowest days on market, ranging from 16 to 46 days. In contrast, Niagara-on-the-Lake stood out as an outlier with significantly higher days on market, ranging from 48 to 106 days.

Figure 22: LSA Detached Home Cumulative Days on Market, 2018-2023



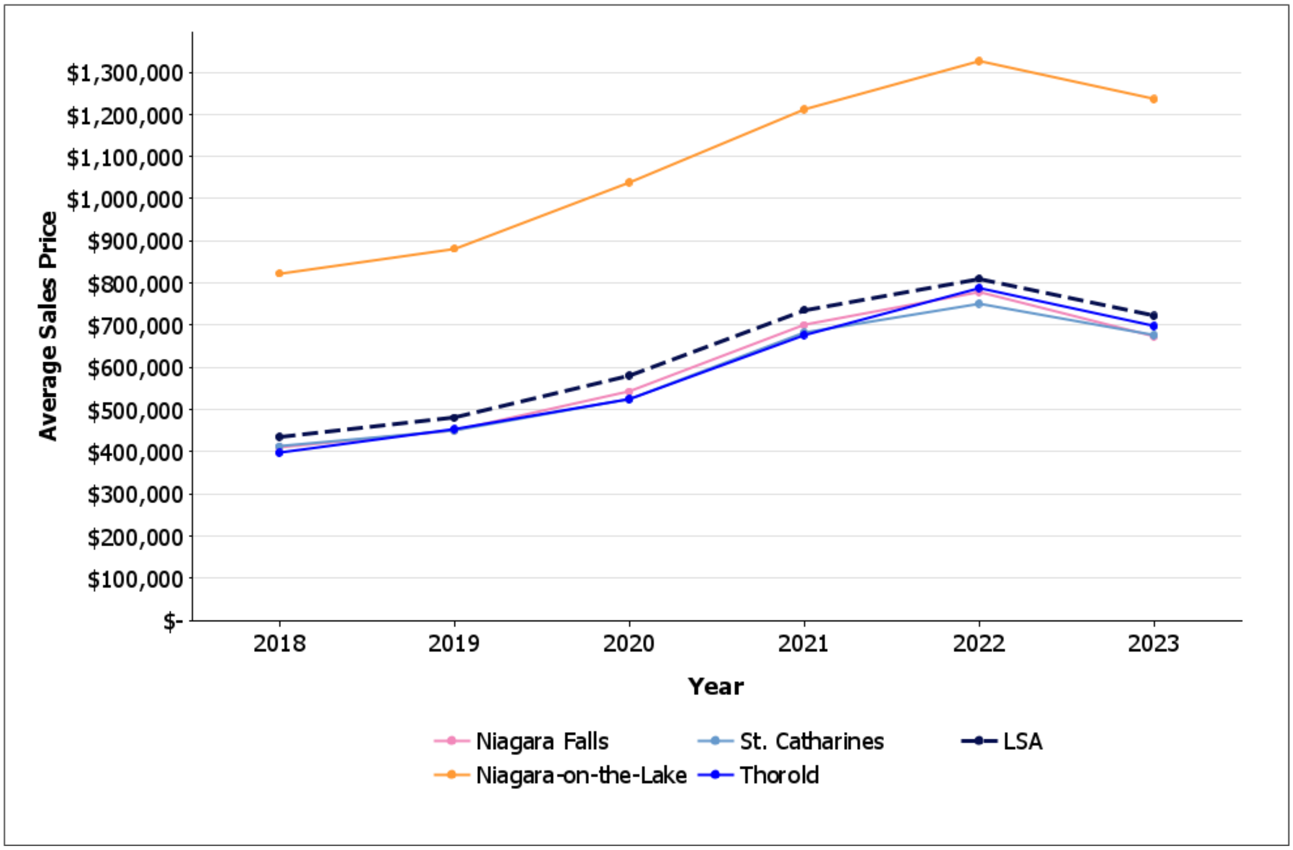
Source: (Avaanz Ltd., 2024a) (McGarr Realty Corp., 2019) (McGarr Realty Corp., 2020) (McGarr Realty Corp., 2021) (McGarr Realty Corp., 2022) (McGarr Realty Corp., 2023) (McGarr Realty Corp., 2024)

Figure 23 presents the average sales price of detached homes in the LSA by community from 2018 to 2023. Home prices increased annually, peaking in 2022, before declining in 2023. Throughout the period, Niagara-on-the-Lake consistently stood out as an outlier, with average sales prices ranging from 1.7 to 2.1 times higher than those in other LSA communities. In contrast, the average sales prices in Niagara Falls, St. Catharines, and Thorold generally remained within a narrow range, differing by 0.7% to 4.7%.

Between 2018 and 2022, the average sales price for detached homes in the LSA rose by 86.2% (~$375,000), increasing from approximately $435,000 to $810,000. The strongest growth was observed in Thorold (98.6%) and Niagara Falls (89.5%), followed by St. Catharines (82.4%) and Niagara-on-the-Lake (61.2%).

From 2022 to 2023, the average sales price in the LSA declined by 10.9% (~$89,000), falling from $810,000 to $722,000. Niagara Falls experienced the steepest decline (-13.5%), followed by Thorold (-11.5%), St. Catharines (-10.0%), and Niagara-on-the-Lake (-6.8%).

Figure 23: LSA Detached Average Sales Price, 2018-2023



Source: (Avaanz Ltd., 2024a) (McGarr Realty Corp., 2019) (McGarr Realty Corp., 2020) (McGarr Realty Corp., 2021) (McGarr Realty Corp., 2022) (McGarr Realty Corp., 2023) (McGarr Realty Corp., 2024)

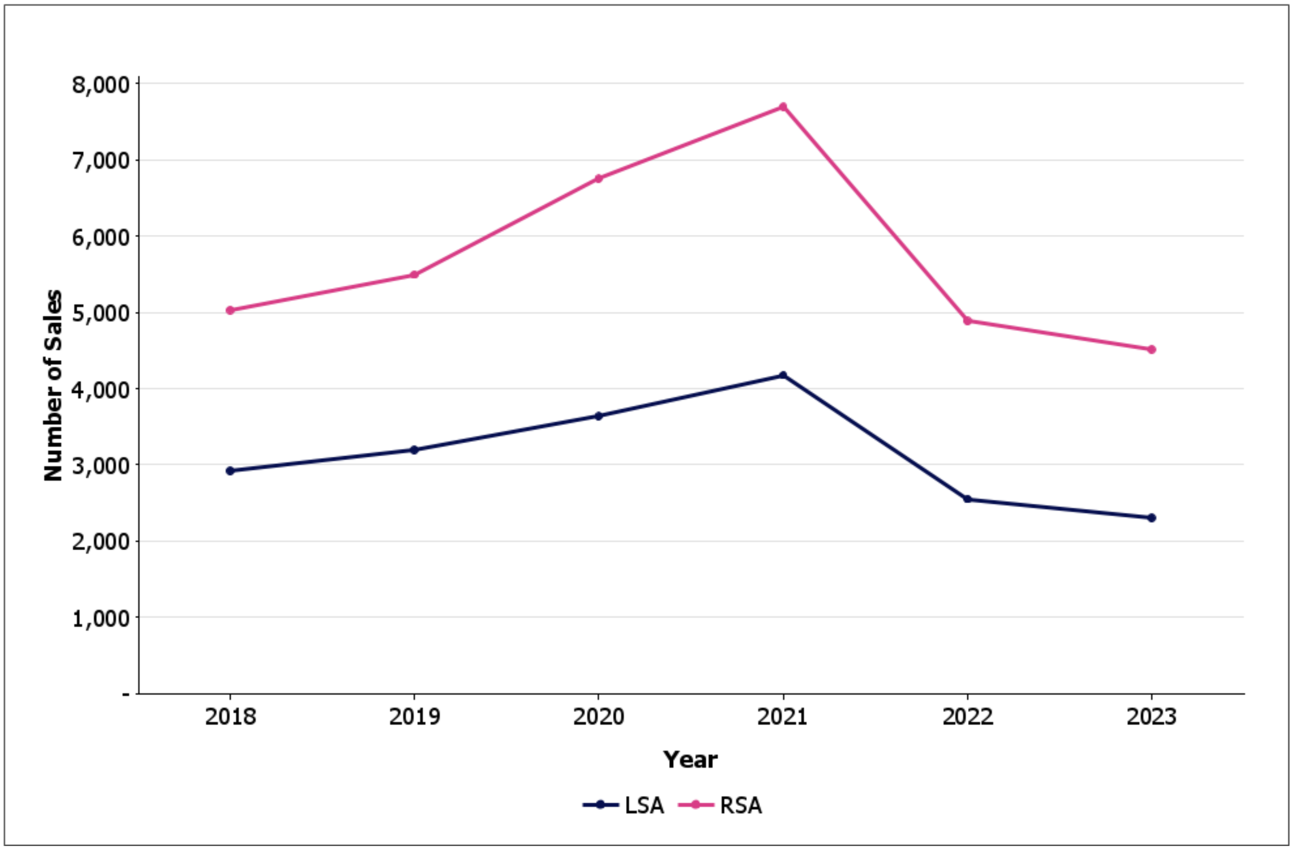
4.2.3 RSA

Figure 24 presents single detached home sales in the LSA and RSA from 2018 to 2023. While sales trends in the RSA generally mirrored those of the LSA, the RSA demonstrated stronger growth and slightly greater resilience to decline.

Between 2018 and 2021, unit sales in the RSA increased by 53.0%, outpacing the LSA's growth of 43.0% by 10.0%. From 2021 to 2023, unit sales in the RSA declined by 41.3%, 3.5% less than the LSA’s decline of 44.8%.

Throughout the forecast period, the LSA's share of RSA unit sales declined, decreasing from 58.1% in 2018 to 51.0% in 2023

Figure 24: RSA and LSA Detached Unit Sales, 2018-2023

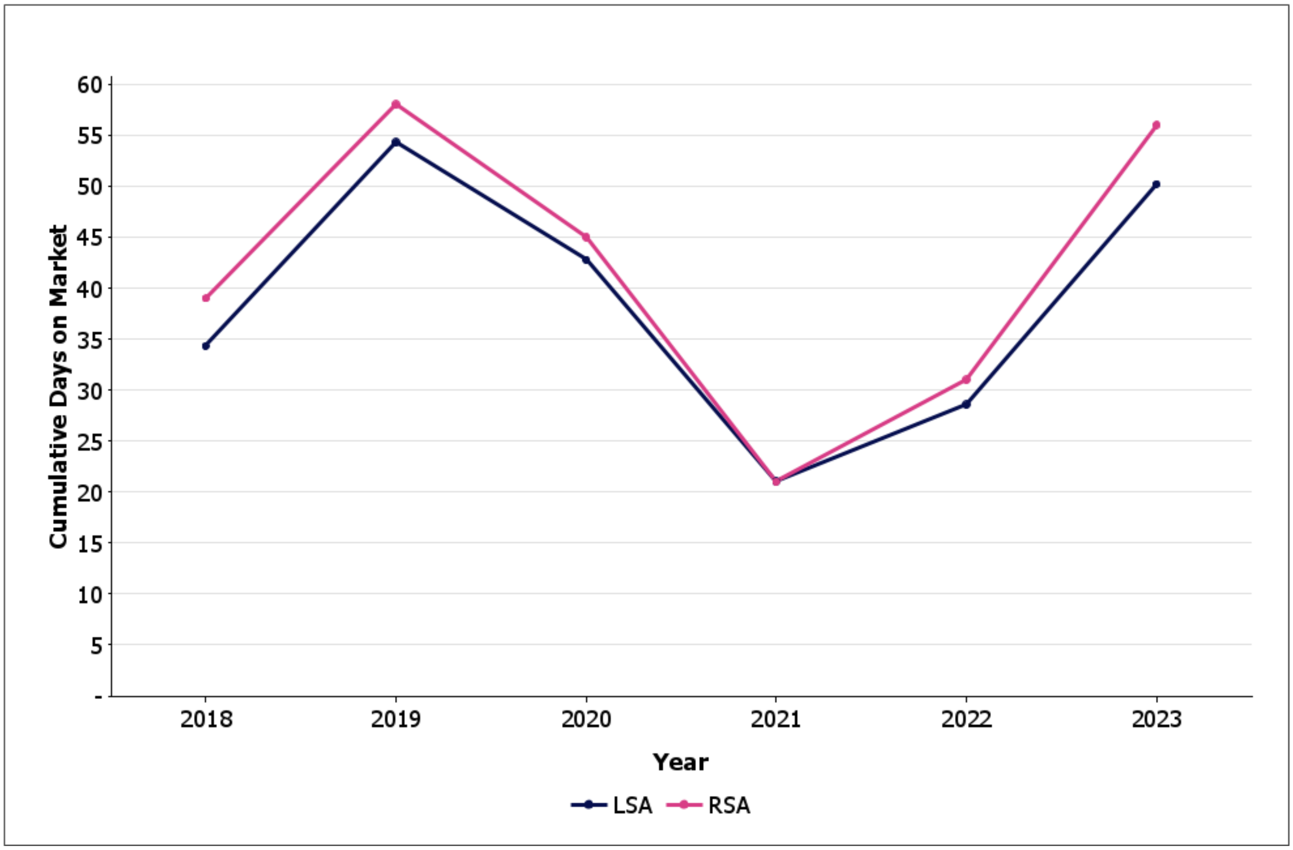


Source: (Avaanz Ltd., 2024a) (McGarr Realty Corp., 2019) (McGarr Realty Corp., 2020) (McGarr Realty Corp., 2021) (McGarr Realty Corp., 2022) (McGarr Realty Corp., 2023) (McGarr Realty Corp., 2024).

Figure 25 presents cumulative days on market for detached homes in the LSA and RSA from 2018 to 2023. During this period, cumulative days on market in the RSA fluctuated between 21 and 58 days, peaking in 2019, reaching a low in 2021, and rising again near the upper range by 2023.

While the RSA followed the same general trend as the LSA, cumulative days on market in the RSA consistently remained higher, exceeding the LSA by up to six days.

Figure 25: RSA and LSA Detached Home Cumulative Days on Market, 2018-2023

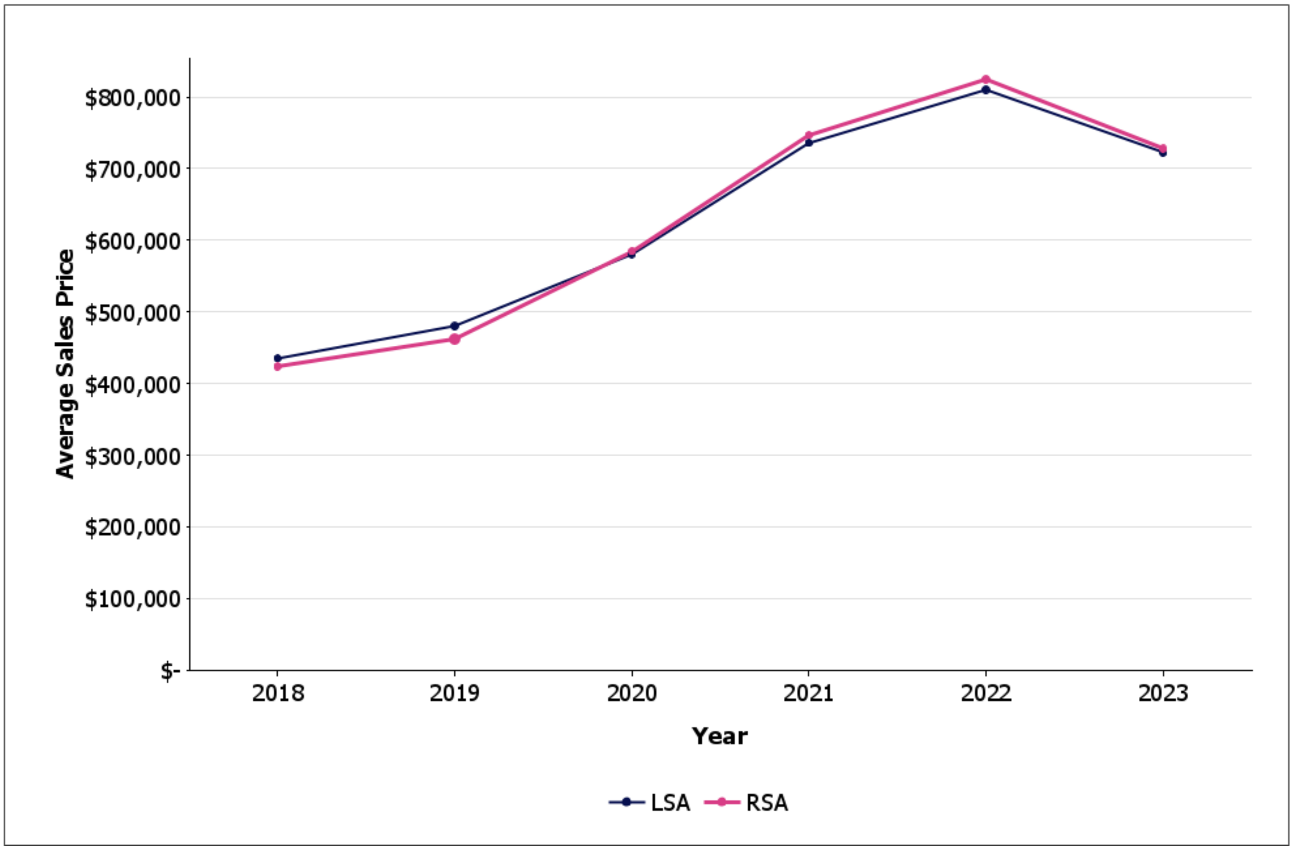


Source: (Avaanz Ltd., 2024a) (McGarr Realty Corp., 2019) (McGarr Realty Corp., 2020) (McGarr Realty Corp., 2021) (McGarr Realty Corp., 2022) (McGarr Realty Corp., 2023) (McGarr Realty Corp., 2024)

Figure 26 presents the average sales price of detached homes in the LSA and RSA from 2018 to 2023. Both regions exhibit similar trends, with average home prices rising annually, peaking in 2022, and then declining in 2023.

Throughout the forecast period, the average sales prices in the RSA closely mirrored those in the LSA, with differences of less than 1% in most years.

Figure 26: LSA and RSA Detached Average Sales Price, 2018-2023



Source: (Avaanz Ltd., 2024a) (McGarr Realty Corp., 2019) (McGarr Realty Corp., 2020) (McGarr Realty Corp., 2021) (McGarr Realty Corp., 2022) (McGarr Realty Corp., 2023) (McGarr Realty Corp., 2024).

4.2.4 Correlation of Interest Rates and Housing Market

Between 2018 and 2024, fluctuations in the Bank of Canada's interest rates significantly impacted the Canadian real estate market. Interest rates are a key determinant of mortgage rates, influencing housing demand and affordability. Lower interest rates reduce borrowing costs, making homeownership more accessible, driving up demand and property prices. Conversely, higher rates increase borrowing costs, curbing demand and stabilizing prices. Below is a summary of interest rate trends during this period and their effects on the housing market.

2018–2019

In January 2018, the Bank of Canada's interest rate stood at 1.00% and was gradually increased to 1.75% by October 2018 to maintain economic stability (Bank of Canada, 2018). The rate remained steady throughout 2019, keeping borrowing costs consistent and supporting stable growth in the housing market (Statistics Canada, 2021).

2020–2021

Due to the unprecedented economic disruption caused by the COVID-19 pandemic, the Bank of Canada undertook a series of rate cuts (3) in March 2020, ultimately reducing the rate from 1.75% to 0.25% (Bank of Canada, 2025) (Bank of Canada, 2020a). This move was intended to provide support to the Canadian financial system and the economy during the COVID-19 pandemic. These rate cuts eased the cost of borrowing supporting the Bank of Canada's efforts to maintain the functioning of the financial system and markets via ensuring the availability of credit to individuals and companies. (Bank of Canada, 2020a).

As time spent at home increased during the pandemic, shifting housing preferences coupled with pent up demand and historically low interest rates boosted home sales to record levels. Canadian housing prices continued to climb above their pre-pandemic levels during 2020 (Statistics Canada, 2021). The 0.25% interest rate was maintained throughout 2021 to support the initial post-pandemic recovery.

2022–2023

In March 2022, the Bank of Canada began its policy of quantitative tightening in response to inflation well above (5.1%) the Bank's 2% target, strong economic recovery of the Canadian economy, and global uncertainties surrounding the invasion of Ukraine by Russia expected to add inflationary pressures (Bank of Canada, 2022). From March 2022 to July 2023, the Bank of Canada raised the interest rate ten times, resulting in a 5.00% interest rate by July 2023, the peak of the rate hikes (Bank of Canada, 2025) (Bank of Canada, 2023). This rapid increase in interest rates led to higher mortgage rates and therefore less affordability to get into the housing market. This change to cost of borrowing coincided with a decline in home sales and prices (Battistib, 2023)

2024

As inflation eased back toward the Bank's 2% target, the Bank of Canada introduced a series of interest rate cuts (5) throughout June to December to support economic growth (Bank of Canada, 2025). By December 2024, the interest rate had been lowered to 3.25% (Bank of Canada, 2024a). The rate cuts are expected to bring back activity into the real estate market, however, as of fall the CREA noted that the interest rate cuts had not spurred the gradual improvement anticipated (Hudes, 2024).

4.3 Public Finance

The municipalities within the LSA have a tax base, which allows them to generate enough money to cover their operating costs. They are financially stable and are growing their infrastructure. These municipalities use the nearby Walker Campus for environmental services. This section highlights the financially health of these municipalities and explains the benefits of having a landfill close to their communities.

4.3.1 Municipal Tax Base

The cumulative assessed property value forms the foundation of the municipal tax base, which municipalities use to generate tax revenue. After adjusting for property types, the tax base represents the value to which the tax rate is applied to calculate tax obligations. This section highlights the strength of the municipal tax base in the LSA and RSA.

4.3.1.1 LSA

The LSA has a municipal tax base of $36.949 billion as of 2023. St. Catharines accounts for a big portion of the LSA's municipal tax base. Residential properties account for 81.3% of the municipal tax base, farmland represents 3.3% and other properties account for 15.4%.

Table 37 shows the tax base composition by municipality in the LSA and RSA.

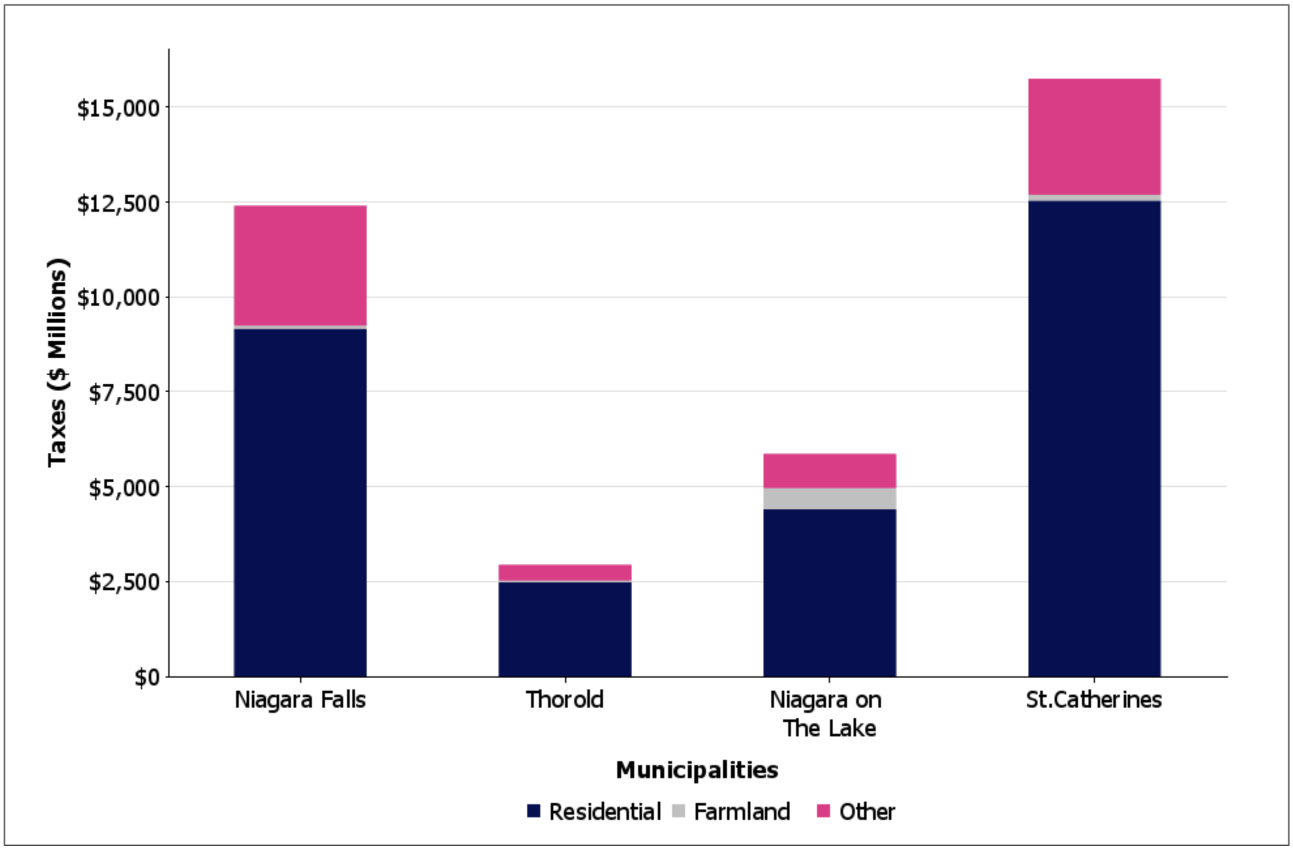
Table 37: Tax Base Composition by Municipality, 2023

Area	Residential	Farmland	Other	Total
Niagara Falls	$9,524,262,215	$84,729,100	$2,791,484,732	$12,400,476,047
Niagara-on-the-Lake	$4,423,785,785	$564,649,916	$872,603,210	$5,861,038,911
St. Catharines	$13,322,336,642	$155,708,800	$2,272,054,860	$15,750,100,302
Thorold	$2,596,391,060	$52,552,340	$288,496,209	$2,937,439,609
LSA	$29,866,775,702	$857,640,156	$6,224,639,011	$36,949,054,869
Niagara Region	$53,943,972,681	$2,446,837,497	$8,495,230,223	$64,886,040,401

Source: (Avaanz Ltd., 2024a) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024a) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024b) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024c) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024d).

Figure 27 shows the composition of the tax base of the municipalities that make up the LSA. The tax base is broken down into key property classes: residential, farmland and other.

Figure 27: Composition of the Tax Base, by Municipality, 2023



Source: (Avaanz Ltd., 2024a) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024a) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024b) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024c) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024d).

4.3.1.2 RSA

The RSA has a municipal tax base of $64.886 billion. The LSA accounts for over half of the RSA's municipal tax base. Similar to the LSA, residential properties are by far the biggest property class accounting for 83.1% of the adjusted municipal tax base, while there is proportionally more farmland in the RSA compared to the LSA it only represents 3.8% of the tax base.

Table 38 and **Figure 28** show the tax base composition for the LSA and RSA. Both have a similar structure:

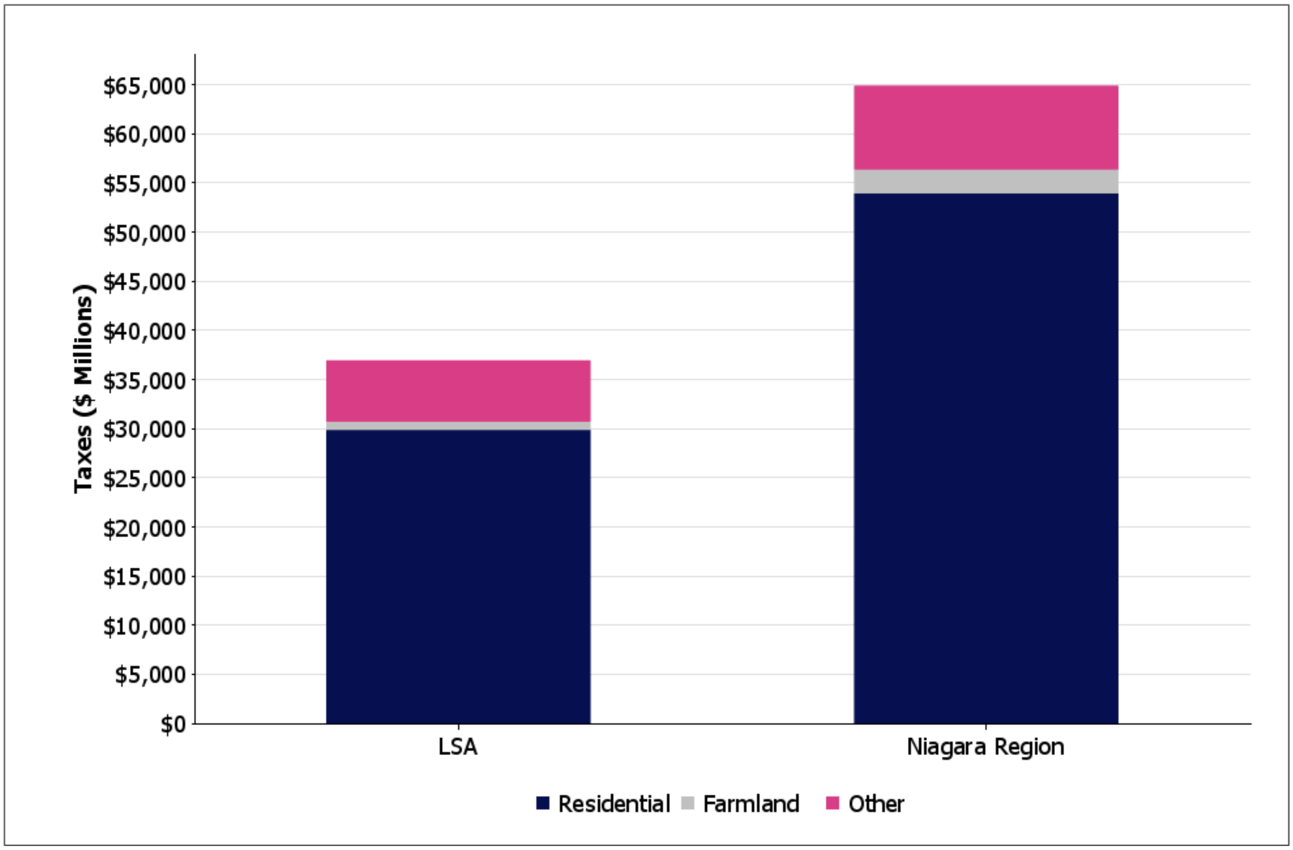
- Residential properties 81.3% (LSA) and 83.1% (RSA), of municipal tax base.
- Farmland 3.3% (LSA) and 3.8% (RSA),
- 'Other' contribute 15.4% (LSA) and 13.1% (RSA).

Table 38: LSA and RSA Composition of the Tax Base, 2023

Study Area	Residential		Farmland		Other	
	$	%	$	%	$	%
LSA	$29,866,775,702	81.3%	$857,640,156	3.3%	$6,224,639,011	15.4%
Niagara Region	$53,943,972,681	83.1%	$2,446,837,497	3.8%	$8,495,230,223	13.1%

Source: (Avaanz Ltd., 2024a) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024a) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024b) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024c) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024d) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024e).

Figure 28: LSA and RSA Composition of the Tax Base, 2023



Source: (Avaanz Ltd., 2024a) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024a) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024b) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024c) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024d) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024e).

4.3.2 Municipal Revenue

Municipalities within the LSA and the RSA receive revenues from different sources, including internal and external funds. This section highlights the LSA and RSA ability to generate strong and diverse revenues, ensuring that municipalities are not dependent on one source of income.

There are two major categories of municipal revenue:

- Own source revenue
- Transfers

Own source revenues are the revenues directly generated by the municipality from sources within the municipality. These include municipal taxes, development charges, service revenue and fees, as well as other directly levied sources. Transfers are monies coming from third parties mainly the provincial and federal government. These may be grants or subsidies, as well as full or partial funding for service delivery.

The total revenue a municipality generates will influence the infrastructure and services that may be provided. This section aims to demonstrate the strong municipal revenues in the LSA and RSA.

4.3.2.1 LSA

The LSA municipalities generated $579.7 million revenue in 2023. Own source revenue represented 64.1% of the revenue generated by LSA municipalities. The biggest source of own source revenue was property taxes representing 69.5% of own source revenue.

Table 39 summarizes the revenues generated by the LSA municipalities.

Table 39: Revenue by Municipality, 2023

		Niagara Falls	Niagara on The Lake	St. Catherines	Thorold	LSA
Own Revenues	Taxes	$86,041,721	$16,840,130	$123,812,614	$24,074,845	$250,769,310
	User Fees and Service Charges	$60,665,427	$18,270,913	$76,252,083	$15,511,859	$170,700,282
	Sum of Own Revenues	$146,707,148	$35,111,043	$200,064,697	$39,586,704	$421,469,592
Government Transfers	Federal	$2,780,227	$90,597	$729,956	$147,587	$3,748,367
	Provincial	$11,389,864	$4,042,753	$6,561,414	$3,272,267	$25,266,298
	Sum of Government Transfers	$14,170,091	$4,133,350	$7,291,370	$3,419,854	$29,014,665
Reserves and Deferred Revenue		$4,377,469	$267,408	$1,180,391	$3,607,672	$5,825,268
Other Revenues		$46,034,217	$7,221,042	$113,107,117	$31,214,892	$166,362,376
Total Revenue		$211,288,925	$46,732,843	$321,643,575	$77,829,122	$579,665,343
Annual Surplus		$11,773,141	$6,589,015	$112,460,901	$37,572,606	$130,823,057

Source: (Avaanz Ltd., 2024a) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024a) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024b) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024c) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024d).

4.3.2.2 RSA

The Region of Niagara is the upper tier municipal government that provides services to all of the lower-tier municipalities in the RSA, including the LSA communities. The Region of Niagara receives own source revenues collected by the lower tier municipalities, and transfers from provincial and federal government, as well as other sources.

The Region of Niagara generated $1.464 billion revenue in 2023. The LSA depends primarily on taxation and other revenue sources (68.2%), with low dependence on government transfers (4.4%). In contrast, the RSA, receives a substantial portion of its revenues from government transfers.

Table 40 shows a detailed breakdown of taxation, government transfers other revenue sources for the LSA and RSA for 2023.

Table 40: LSA and RSA Sum of Revenue, 2023

		LSA	Niagara Region
Own Revenues	Taxes	$250,769,310	$466,042,173
	User Fees and Service Charges	$170,700,282	$314,423,298
	Sum of Own Revenues	$421,469,592	$780,465,471
Government Transfers	Federal	$3,748,367	$29,974,878
	Provincial	$25,266,298	$452,493,187
	Sum of Government Transfers	$29,014,665	$482,468,065
Reserves and Deferred Revenue		$9,432,940	$51,512,202
Other Revenues		$197,577,268	$150,489,263
Total Revenue		$657,494,465	$1,464,935,001
Annual Surplus		$168,395,663	$183,773,741

Source: (Avaanz Ltd., 2024a) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024a) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024b) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024c) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024d) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024e).

4.3.3 Financial Stability

The financial stability of municipalities in the study areas can be assessed through multiple measures:

- Revenue diversity
- Operating surplus/(deficits)
- Debt levels
- Liquidity

This section aims to demonstrate the financial stability of the LSA and RSA municipalities.

4.3.3.1 LSA

The LSA municipalities are all financially stable. Each of the municipalities have:

- Diverse revenue sources,
- operating surpluses,
- Debt service coverage ratios is greater than or equal to 2.
- Are liquid enough to use current assets to pay their current debt obligations, on average 4 times over.

Table 41 shows the key performance indicators that demonstrate the financial stability of the LSA municipalities.

Table 41: LSA Municipality Financial Stability Metrics

Financial Stability Metrics	Niagara Falls	Niagara-on-the-Lake	St. Catharines	Thorold
Current Ratio	4.0	2.7	5.4	3.4
Debt Service Coverage Ratio	6	17	8	285

Source: (Avaanz Ltd., 2024a).

St. Catharines exhibits the highest ratio of cash and cash equivalents to current debt obligations among the LSA communities. Niagara Falls and St. Catherines have the lowest debt service coverage ratios of 6 and 8, respectively.

4.3.3.2 RSA

The Region of Niagara is financially stable. The Region of Niagara has diverse revenue sources and achieved an operating surplus in the most recent year at the time of writing (2023). While the Region of Niagara has sufficient current assets to cover its current debts, the current ratio (1.1) is lower than any of the LSA municipalities. The Region of Niagara has a debt service coverage ratio of 6.

Table 42 shows the key performance indicators that demonstrate the financial stability of the Region of Niagara, lower than the average LSA ratio.

Table 42: Region of Niagara Financial Stability Metrics

Financial Stability Metrics	LSA	Niagara Region
Current Ratio	3.9	1.1
Debt Service Coverage Ratio	79	6

Source: (Avaanz Ltd., 2024a).
Note: The LSA ratios is a calculated as the average of the four municipalities.

4.3.4 Tangible Capital Assets

The tangible capital assets of a municipality are the municipally owned infrastructure and facilities. Tangible capital assets depreciate over time. Investment in infrastructure and other assets at a rate greater than the rate of depreciation is a metric that can be helpful in assessing the state of infrastructure in a community.

This section characterizes the tangible capital assets of the municipalities in the study areas and describes the amortization and investment as a measure of the state of infrastructure.

4.3.4.1 LSA

The majority (63.2%) of the tangible capital assets in the LSA municipalities are investments in infrastructure. In 2023 4.5% of the tangible capital assets were construction projects in progress.

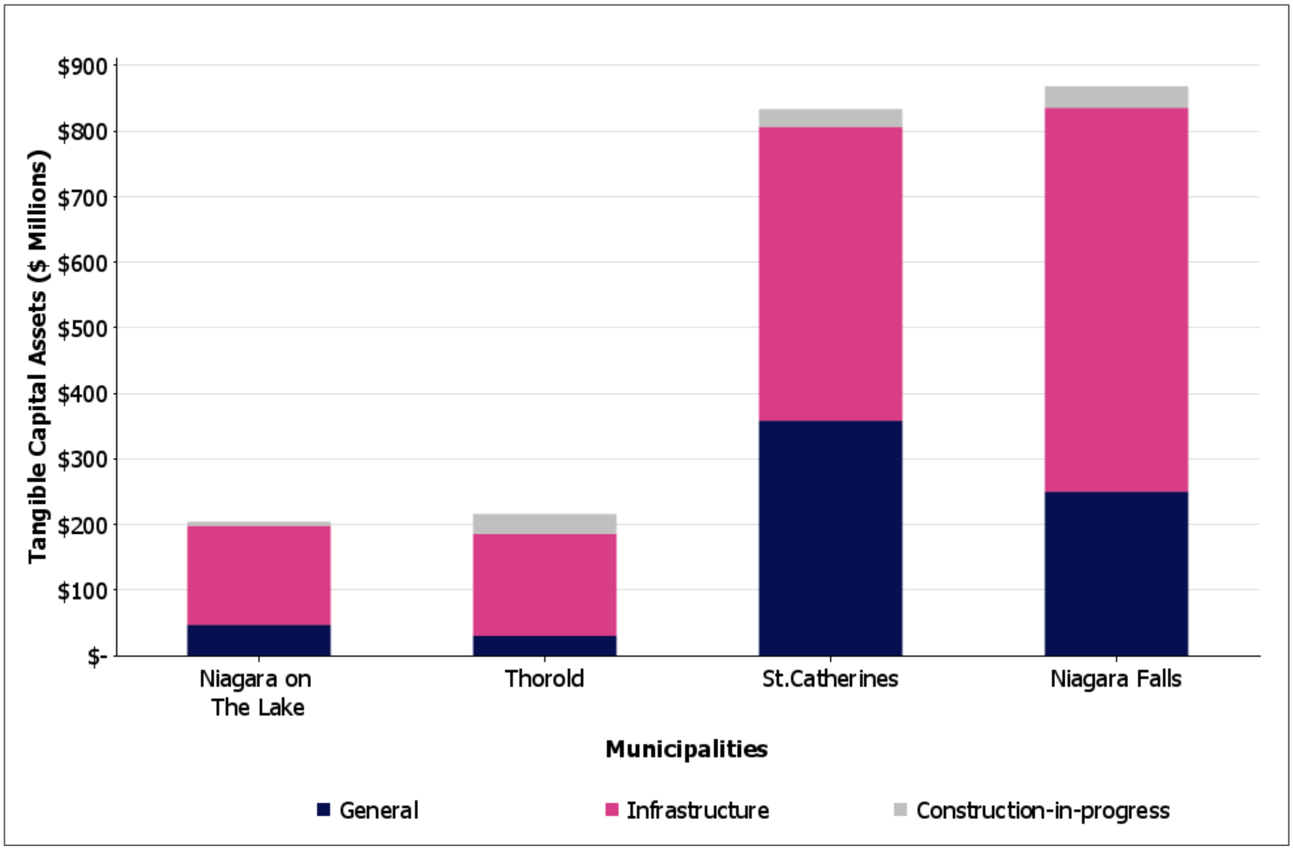
Table 43 and **Figure 29** show the distribution of tangible capital assets for the municipalities, divided by capital asset type for the year 2023. The capital assets are divided into three key components: general capital assets, infrastructure assets, and construction in progress.

Table 43: Tangible Capital Assets Segmented by Capital Asset, By Municipality, 2023

	Niagara Falls	Niagara on The Lake	St. Catherines	Thorold	LSA
General	$250,330,838	$47,132,275	$358,114,736	$30,267,375	$685,845,224
Infrastructure	$585,356,420	$150,853,256	$448,066,848	$155,343,641	$1,339,620,165
Construction-in-progress	$32,648,341	$5,977,619	$26,956,886	$30,042,460	$95,625,306
Total	$868,335,599	$203,963,150	$833,138,470	$215,653,476	$2,121,090,695

Source: (Avaanz Ltd., 2024a) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024a) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024b) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024c) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024d).

Figure 29: Tangible Capital Assets Segmented by Capital Asset, By Municipality, 2023



Source: (Avaanz Ltd., 2024a) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024a) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024b) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024c) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024d).

The four LSA municipalities have most of their tangible capital assets allocated to infrastructure, ranging from 54% to 74%. General capital assets, such as buildings and equipment, make up a smaller share. Construction-in-progress is relatively low.

The LSA municipalities are all investing in infrastructure at a rate faster than it is depreciating. Thorold and St. Catharines are substantively increasing their tangible capital asset base, while Niagara Falls and Niagara on the lake are closer to maintaining their current value of tangible capital assets.

Table 44 shows the total municipal capital investment, amortization of tangible capital assets, and asset sustainability ratio for the municipalities in the LSA for 2023.

Table 44: Municipal Capital Investment, Amortization of Tangible Capital Assets, and Asset Sustainability Ratio, by Municipality, 2023

	Niagara Falls	Niagara-on-the-Lake	St. Catharines	Thorold
Total Capital Assets - Additions and Betterments	$39,974,742	$9,150,805	$93,319,970	$28,806,102
Amortization of Tangible Capital Assets	$29,939,253	$6,655,221	$29,776,565	$7,090,366
Asset Sustainability Ratio	133.5%	137.5%	313.4%	406.3%

Source: (Avaanz Ltd., 2024a) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024a) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024b) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024c) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024d).

4.3.4.2 RSA

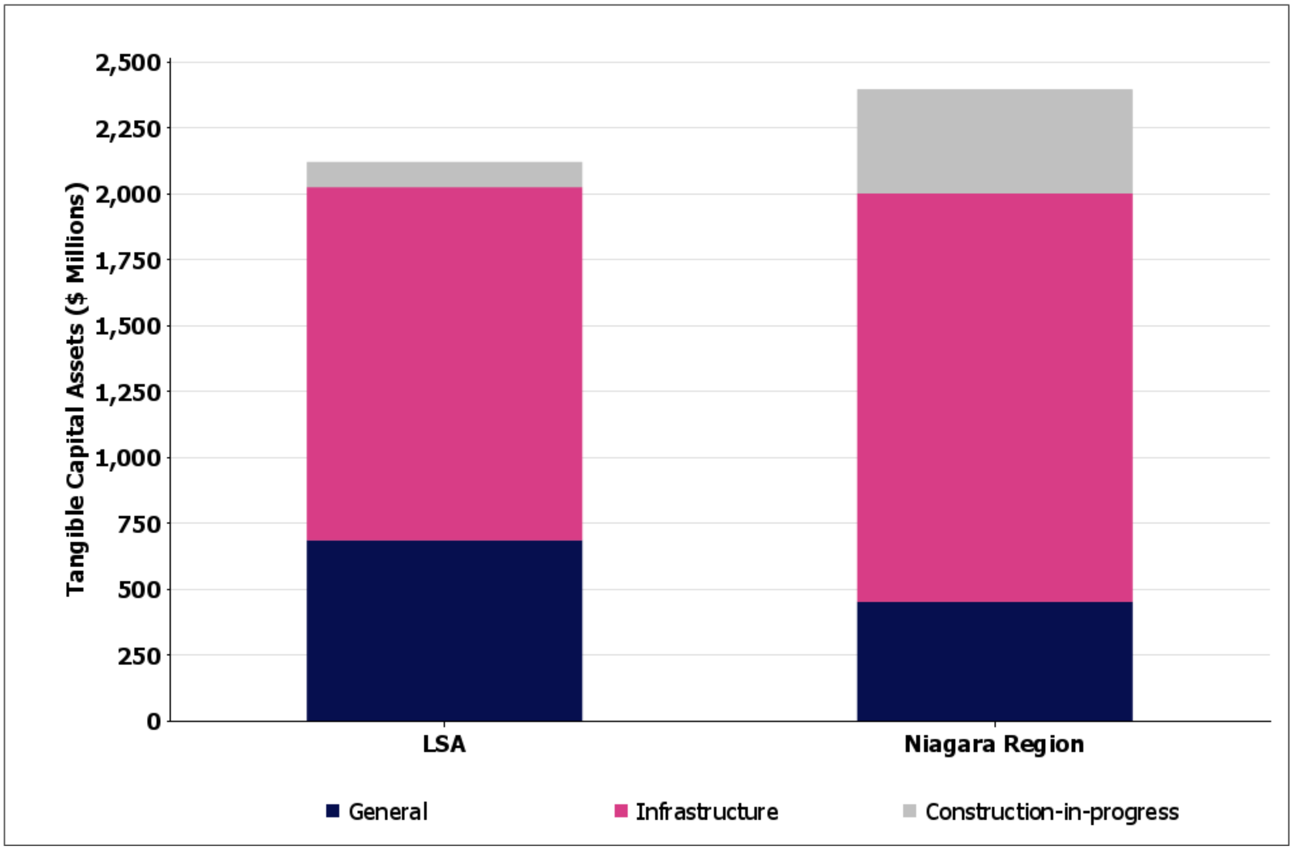
Niagara Region tangible capital asset base in approximately 13% larger to the sum of municipalities in the LSA. The Region of Niagara has almost four times as much construction in progress compared to the LSA. **Table 45** and **Figure 30** show the distribution of tangible capital assets for the LSA and RSA, divided by capital asset type for the year 2023.

Table 45: LSA and RSA, Tangible Capital Assets Segmented by Capital Asset, 2023

Capital Assets	LSA	Niagara Region
General	$685,845,224	$452,107,029
Infrastructure	$1,339,620,165	$1,549,006,334
Construction-In-Progress	$95,625,306	$395,227,309
Total Tangible Capital Assets	$2,121,090,695	$2,396,340,672

Source: (Avaanz Ltd., 2024a) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024a) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024b) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024c) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024d) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024e).

Figure 30: LSA and RSA, Tangible Capital Assets Segmented by Capital Asset, 2023



Source: (Avaanz Ltd., 2024a) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024a) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024b) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024c) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024d) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024e).

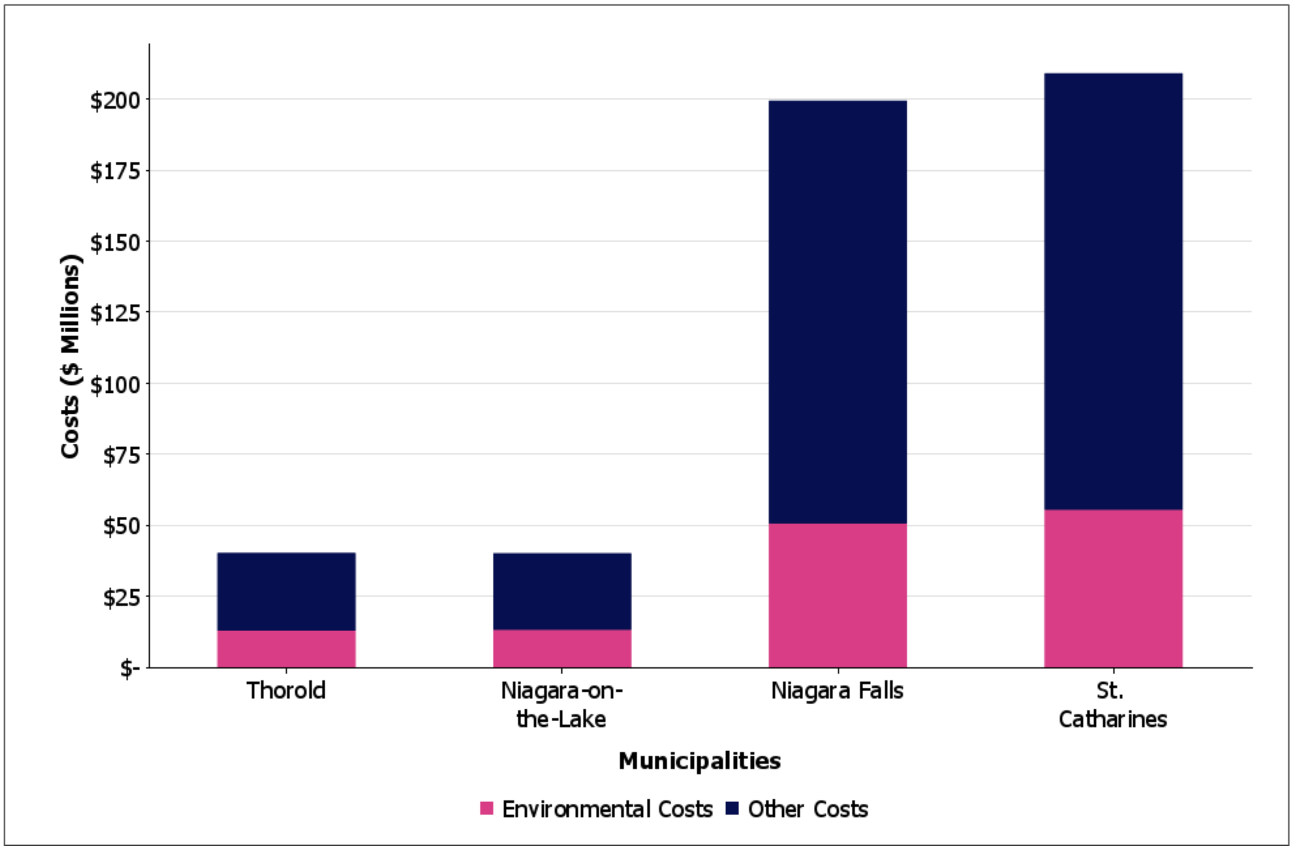
4.3.5 Environmental Services Costs (Landfill Costs)

Environmental service costs for municipalities include the costs a municipality incurs for managing their solid waste. Solid waste disposal at a landfill is a material cost in an environmental service portfolio. This section aims to highlight the amount of money being spent on environmental services and highlight the municipalities that are currently using Walker's existing landfill for disposal.

4.3.5.1 LSA

Municipalities in the LSA spend 25% - 33% of their operating expenses on environmental services. **Figure 31** and **Table 46** compare the amount of money LSA municipalities spend on environmental services compared to their total operating expenses.

Figure 31: LSA Environmental Services Compared to Other Operating Expenses, 2023



Source: (Avaanz Ltd., 2024a) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024a) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024b) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024c) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024d).

Table 46: LSA Environmental Services Compared to Other Operating Expenses, 2023

	Niagara Falls		Niagara-on-the-Lake		St. Catharines		Thorold	
	$	%	$	%	$	%	$	%
Environmental	$50,646,609	25.4%	$13,257,633	33.0%	$55,540,435	26.6%	$12,869,506	31.8%
Other	$148,869,175	74.6%	$26,886,195	67.0%	$153,642,239	73.4%	$27,587,291	68.2%
Sum of Category	$199,515,784	100.0%	$40,143,828	100.0%	$209,182,674	100.0%	$40,456,797	100.0%

Source: (Avaanz Ltd., 2024a) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024a) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024b) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024c) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024d).

4.3.5.2 RSA

Environmental services are a major municipal cost at the RSA level. The Region of Niagara spent $184,806,521 on Environmental services in 2023. This represents 14% of their total operating expenses.

Table 47 shows the environmental services costs compared to total operating costs for LSA and the RSA for 2023.

Table 47: LSA and RSA Operating Expenses by Function, 2023

Operating Expenses	LSA		Niagara Region	
	$	%	$	%
Environmental	$132,314,183	28.2%	$184,806,521	14.4%
Other	$356,984,900	71.8%	$1,096,354,739	85.6%
Sum of Category	$489,299,083	100.0%	$1,281,161,260	100.0%

Source: (Avaanz Ltd., 2024a) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024a) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024b) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024c) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024d) (Province of Ontario - Ministry of Municipal Affairs and Housing, 2024e).

4.3.6 Walker Municipal Water Treatment Usage

Walker collaborates with the Niagara-on-the-Lake to manage leachate generated from its landfill operations. The leachate is sent to the municipal sewer system and treated at their treatment plant, with Walker paying $1.57 per m³ for the treatment services.

On average, Walker discharges 350,000 m³ of leachate annually. This arrangement ensures efficient utilization of existing infrastructure while maintaining capacity for other municipal needs.

This partnership is forecast to generate $600,000 in revenue for Niagara-on-the-Lake in 2025, offsetting operational expenses and supporting sustainable wastewater management. This agreement highlights the financial and environmental benefits of leveraging municipal infrastructure to manage industrial wastewater treatment.

4.4 Waste Disposal Services

The section provides an overview of waste disposal services in Ontario and the RSA, highlighting key trends, infrastructure, and cost considerations. In Ontario, the majority of waste is disposed of in landfills, with only 24.2% diverted due to the high costs of alternative waste diversion methods. The province generates 9 to 12 million tonnes of waste annually, primarily from IC&I sectors, and faces significant landfill capacity challenges, with projections suggesting depletion by 2034. Approximately one-third of Ontario's waste is exported to U.S. landfills, primarily in Michigan, driven by lower tipping fees despite higher haulage costs.

In the RSA, waste management is supported by three operational landfills accepting municipal solid waste (MSW): Humberstone, Niagara Road 12, and the privately-owned Walker South Landfill. Together, these facilities provide critical disposal capacity, with municipal landfills estimated to meet regional needs for the next 25 to 40 years. The South Landfill, serving both residential and ICI waste, accounts for 41% of the region's waste management and is expected to reach its current capacity by 2029-2031. Tipping fees and haulage costs are central to waste disposal decisions, with Ontario balancing higher fees against proximity advantages, while Michigan landfills offer lower tipping fees but incur higher transportation costs.

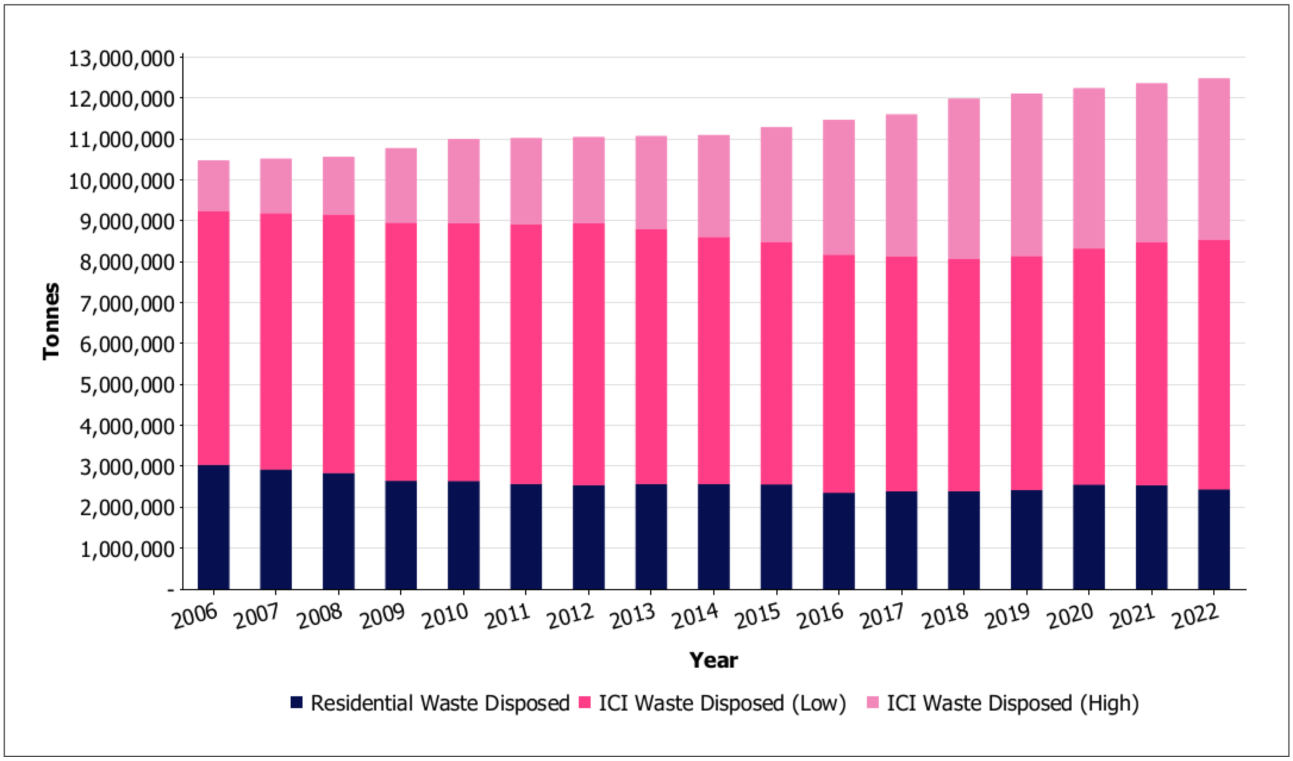
4.4.1 State of Waste Disposal

4.4.1.1 Ontario

In Ontario, the majority of waste generated is disposed in landfills. According to Statistics Canada's Waste Management Industry Survey (2022), only 24.2% of all waste generated in Ontario was diverted from landfills (Statistics Canada, 2024b) (Statistics Canada, 2024d). This low diversion rate is largely attributed to the relatively low tipping fees for landfill disposal compared to the higher costs of alternative waste diversion methods (AET Group Inc., 2021).

Ontario is estimated to dispose of between 9 to 12 million tonnes of waste annually, with the majority originating from Industrial, Commercial, and Institutional (ICI) sectors. The variation in estimates come from different sources, Statistics Canada and Waste to Resource Ontario (AMO, 2023). **Figure 32** sets out Ontario waste disposal by generating source residential and ICI.

Figure 32: Waste Disposed between 2006-2022 in Ontario



Source: (AMO, 2023)

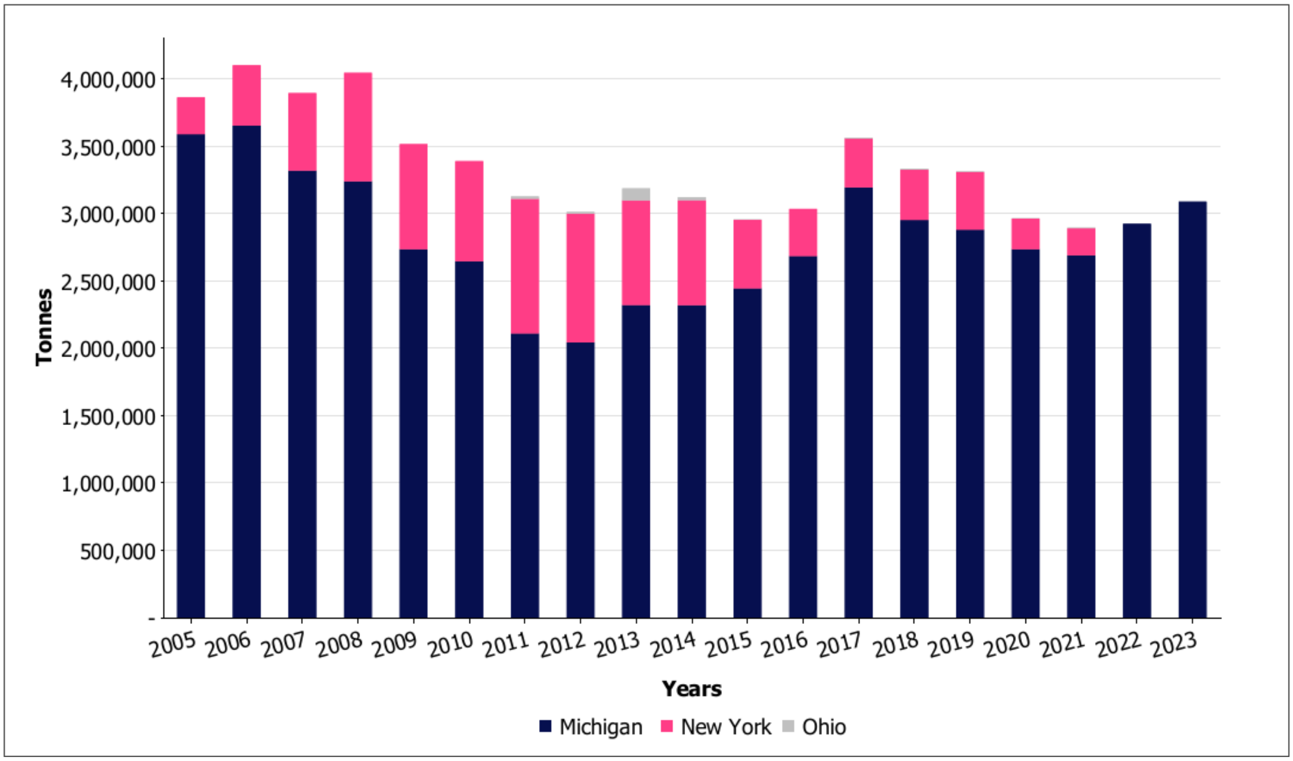
Between 2006 and 2022, approximately one-third of Ontario's waste disposal needs were met by landfills in Michigan, New York, and Ohio, with the remaining non-hazardous waste disposed of in Ontario landfills and a small portion at waste to energy facilities. The distribution of Ontario waste exports disposed amongst US landfills by state in 2021 was:

- 92.9% Michigan;
- 6.9% New York; and
- 0.2% Ohio

Source: (AMO, 2023)

Figure 33 sets out Ontario waste exports to the US by State.

Figure 33: Ontario Waste Exports to US



Source: (AMO, 2023) (Roos, 2024)
Note: The figure does not include data for New York and Ohio for 2022 or 2023.

According to Ontario Waste Management Association's 2021 landfill report, the province is projected to have its landfill capacity depleted by 2034. This estimate is based on waste disposal volumes and weights recorded between 2019 and 2021, combined with additional approved but as-yet-unbuilt capacity. The calculation assumes that approximately 30 percent of the solid waste generated in Ontario will continue to be exported to the United States. Many municipal landfills are nearing or have already reached capacity, forcing municipalities to become increasingly reliant on a limited number of private disposal sites (AMO, 2023). As of 2021, private landfills provide 53 percent of the province's landfill capacity, a significant increase from 36 percent in 2017 (Ontario Waste Management Association, 2021).

4.4.1.2 RSA

Landfills

There are three operational landfills (actively landfilling) accepting MSW located in the RSA to service the population base:

- Humberstone in Welland,
- Niagara Road 12 in West Lincoln, and
- Walker South Landfill in Niagara Falls.

The former two landfills are owned and operated by Niagara Region. The combined total approved site capacity of the Humberstone and Niagara Road 12 landfills is about 4.05 million m^3 and are approved to receive a combined annual fill of 253,760 tonnes. According to the 2022 Landfill Capacity Review, the two existing municipal landfills owned by Niagara Region have sufficient capacity to accommodate current waste tonnage for the next 25 to 40 years (Niagara Region, 2023). To further support waste management needs, Niagara Region also contracts with Walker Environmental Group for access to its privately owned and operated South Landfill providing additional disposal capacity and drop-off services (Niagara Region, 2023). The Region has a partnership agreement with Walker for the disposal of curbside-collected waste from St. Catharines, Thorold, Niagara-on-the-Lake, and specific collection routes and days in Niagara Falls at their landfill site. This agreement also covers residential self-hauled waste delivered to their drop-off depot. Each year, Walker manages about 36,000 tonnes of waste for the Region (GHD, 2024).

Walker South Landfill has been operating since 2009 under Environmental Compliance Approval (ECA) No. 0084- 78RKAM, as amended, and has a total approved site capacity of 17.7 million m^3. The South Landfill provides disposal capacity for solid, non-hazardous waste from residential and ICI sources to its customer base within the City of Niagara Falls, the Regional Municipality of Niagara, and the Province of Ontario (Walker Environmental Group, 2024c). Approximately, 75% of waste received at the South Landfill is from ICI and 25% is residential waste from municipalities (Avaanz Ltd., 2024b). Walker currently accepts approximately 41% of waste generated by Niagara Region. The maximum allowance per year exclusively dedicated to Niagara Region is 100,000 tonnes (GHD, 2024).

The South Landfill is approved to receive an annual fill of 1.1 million tonnes (a maximum of 850,000 tonnes of residual waste plus an additional 250,000 tonnes of soil used for daily and interim cover per year). The current approved capacity at the South Landfill (Phase 1) is estimated to be reached between 2029 and 2031 (Walker Environmental Group, 2024c).

Details regarding the ownership, location, total waste capacity, maximum approved fill rate, and service restrictions of the operational landfills accepting MSW within the RSA are presented in **Table 48**.

Table 48: RSA Operational Landfills Accepting MSW

Site Name	Owner	Township/ Municipality	Site Location	Maximum Waste Disposal Capacity (m3)	Maximum Approved Fill Rate (tonnes)	Estimated Remaining Capacity (m3)	Service Area Restrictions
South Landfill	Walker Environmental Group Inc.	Niagara	3081 Taylor Road, Niagara Falls, ON (Lots 31, 49, 50 and 66)	17,700,000	10,000 t/ day and 1,100,000 t/ year		Province of Ontario
Humberstone Landfill	Niagara Region	City of Welland	700 Humberstone Road, Welland, ON Lot 26 and 27, Concession 5, City of Welland	4,600,000	700 t/ day	2,074,000 as of Jan 1, 2023	Boundaries of Niagara Region
Niagara Road 12 Landfill	Niagara Region	Township of West Lincoln	7015 Concession Road 7, West Lincoln, ON Part Lots 6 and 7, Concession 7, Township of West Lincoln	1,851,000	136 t / day	856,219 as of Jan 1, 2023	The Municipalities of Grimsby, West Lincoln, Lincoln and Pelham

Source: (GHD, 2024) (Province of Ontario, 2021a) (Province of Ontario, 2021b)

Demand for Waste Treatment and Disposal

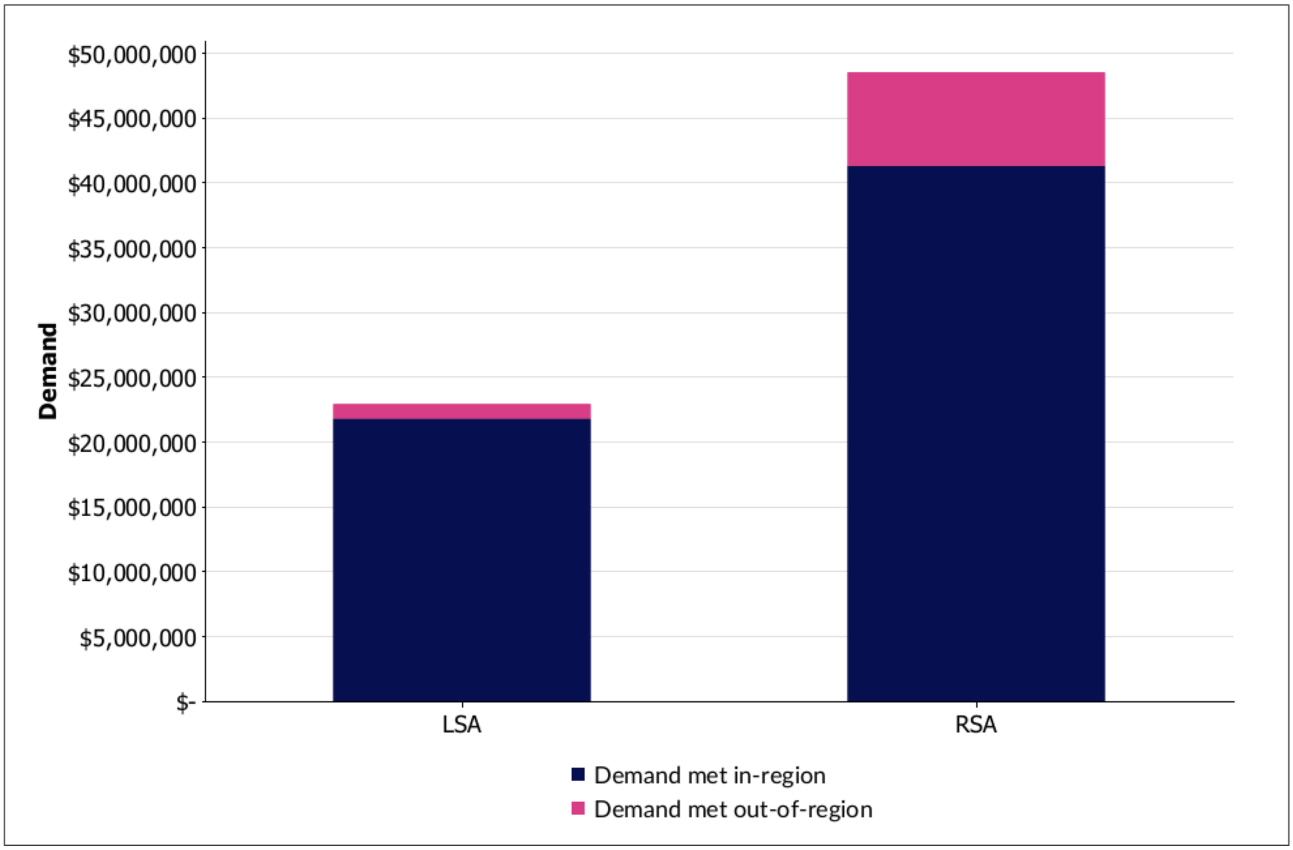
In 2022, total demand for waste treatment and disposal services (excluding waste collection) in the LSA and RSA was $22,921,000 and $48,536,000 respectively. The vast majority of demand for waste treatment and disposal services was met in-region:

- 95.2% for the LSA, and
- 85.1% for the RSA

Source: (Lightcast, 2024e)

Figure 34 presents the demand for waste treatment and disposal services met in-region and out-of-region for the LSA and RSA.

Figure 34: LSA and RSA Demand for Waste Treatment and Disposal Services, 2022



Source: (Lightcast, 2024e)

4.4.2 Tipping Fees and Waste Haulage Costs

After collection, waste disposal involves two major cost components: tipping fees and haulage costs. Tipping fees are the charges imposed per tonne of waste at disposal facilities, while haulage costs represent the transportation expenses incurred to move waste from transfer stations to landfills. Together, these factors influence the total cost of waste management and determine the economic feasibility of using local versus more distant landfills.

This section examines tipping fees and haulage costs within Niagara Region, the Greater Toronto and Hamilton Area (GTHA), Southwestern Ontario, and neighboring U.S. jurisdictions, including New York and Michigan. It highlights how these costs shape disposal options and competitiveness in the waste management sector.

Information regarding tipping fees within Niagara Region, the Greater Toronto and Hamilton Area (GTHA), Southwestern Ontario, New York State, and Michigan State were collected from a variety of sources. Niagara Region and the GTHA represent the primary customer base for Walker's South

Landfill, while private landfills in other areas in Southwestern Ontario, New York, and Michigan offer alternative disposal capacity for Ontario ICI customers.

Tipping fees for 2024 charged per tonne of mixed waste at public drop-off facilities in Niagara Region, the GTHA and other areas in Southwestern Ontario are presented in **Table 49**. It is important to note that the fees presented in are based on posted tipping fees and not lower rates provided based on larger volumes or 'put-or-pay agreements' (e.g., contracts that oblige service providers to guarantee a predefined amount of waste over a specified time period at a fixed price).

Table 49: Tipping Fees at Public Drop-Off Facilities by Municipality, 2024

Municipality	Per Tonne Rate
Niagara Region	$125
Durham Region	$175
Halton Region	$194
City of Hamilton	$130
City of London	$75
Peel Region	$128
City of Toronto	$176
York Region	$170
Waterloo Region	$100

Source: (Prpic, 2024) (City of Toronto, 2024) (Region of Durham, 2024) (York Region, 2023)

Niagara Region is proposing to maintain it's tipping fee at $125 pet tonne in 2025 (Prpic, 2024). The 2024 gate rate tipping fee posted by Walker for its facility in Niagara is $128.37 per tonne (Walker, 2024b).

Average tip fees for Michigan, New York, and Ohio obtained from the Environmental Research & Education Foundation (EREF). The EREF maintains a database of municipal solid waste (MSW) landfill tipping fees across the US that includes both private and public landfills. The EREF collects tipping fee data via asking landfill owners to provide gate rate information for MSW disposal, supplemented by current website information on fees (EREF, 2024). **Table 50** sets out the 2023 average tip fees for Michigan, New York, and Ohio obtained from EREF converted to Canadian dollars (Bank of Canada, 2024b). These fees are lower than in Ontario, with Michigan and Ohio being significantly cheaper.

Table 50: Average Landfill Tipping Fees by State, 2023

State	Average Per Tonne Rate
Michigan	$78.58
New York	$118.31
Ohio	$57.93

Source: (Avaanz Ltd., 2024a) (EREF, 2024)

Bulk volume landfill tipping rates for ICI mixed waste in Canada are estimated at $35 - $60 per tonne in today's dollars (AET Group Inc., 2021) (Statistics Canada, 2024c). Tipping rates are generally tied to the costs of exporting waste to neighbouring US jurisdictions. Ontario landfills tend to have higher tipping fees however due to proximity to generators transportation costs tend to be lower. While landfills in Michigan tend to have lower tipping fees but are further distance from Ontario generators and therefore have higher costs associated with transportation. In the Ontario marketplace, the overall cost to a generator to dispose of waste is roughly the same whether using a US landfill an Ontario landfill (AET Group Inc., 2021). Walker adjusts its tipping rates at South Landfill in order to remain competitive with Michigan taking into account the cost of transportation. The current rate for long-haul of mixed waste in Ontario is $200 per hour (Avaanz Ltd., 2024b). The driving distance and estimated travel time from Walker's South Landfill to alternative private facilities in Ontario and Michigan is set out in **Table 51**.

Table 51: Alternative Private Landfill Distances from Walker South Landfill

Landfill	Province/ State	Municipality	Driving Distance One Way	Estimated Driving Time One Way (6:00 AM Departure)
Twin Creeks Landfill	Ontario	Warwick Township	249 km	2 hr 20 min to 2 hr 50 min
Ridge Landfill	Ontario	Chatham-Kent	294 km	2 hr 50 min to 3 hr 20 min
Pine Tree Acres, Inc.	Michigan	Lenox Township	335 km	3 hr 10 min to 4 hr
Carleton Farms Landfill	Michigan	Sumpter Township	429 km	4 hr to 5 hr

Source: (Google, 2024)

5. Conclusions

The conclusions drawn from this analysis underscore the significant role of Walker and the South Landfill in the economic, financial, and operational stability of the LSA and RSA. Their contributions extend across key sectors, including employment, GDP, municipal revenue, and waste management efficiency, while maintaining a minimal negative impact on farms, tourism, and real estate markets. This comprehensive evaluation highlights the landfill's importance in supporting regional growth and sustainability, ensuring its value as a cornerstone of the community's economic framework.

Walker and the existing South Landfill are pivotal to the local and regional economy, supporting over 245 full-time jobs and contributing approximately $24.7 million annually to provincial GDP. While agriculture has historically played a key role, its economic importance has declined significantly, with farm jobs in the LSA decreasing by 18.6% between 2018 and 2023. Tourism remains a critical driver of regional employment, with the sector contributing 15.3% of LSA jobs in 2023, despite setbacks during the COVID-19 pandemic. Trends in farms and tourism appear to be uncorrelated with the ongoing operations of the landfill, with no evidence suggesting a significant negative impact on these industries. Overall, Walker's contributions span labour, businesses, and industries, stabilizing the economy and enabling diverse economic opportunities in the LSA and RSA.

The real estate market in the LSA and RSA has seen a change to the consistent increases, with sales peaking in 2021 but declining sharply by 44.8% in the LSA and 41.3% in the RSA by 2023. These trends are influenced by macroeconomic factors such as fluctuating interest rates, rather than by the current or proposed Walker operations.

The LSA and RSA municipalities are financially stable, with diverse revenue sources and strong municipal tax bases. Walker's landfill operations contribute to this stability by providing environmental services and revenue streams, such as leachate treatment payments projected to generate $600,000 annually for Niagara-on-the-Lake. Proximity to the landfill enables cost efficiencies and supports sustainable infrastructure investment without negatively impacting the fiscal health of these communities.

RSA customers benefit from the proximity of the Walker South Landfill, which supports 41% of the region's waste management needs, providing cost-effective disposal options compared to alternatives with higher transportation costs. By reducing haulage distances, the landfill offers a financial and logistical advantage for residential and ICI sectors, ensuring efficient waste management within the region. This proximity mitigates reliance on out-of-province disposal options, supporting both affordability and sustainability in waste management.

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Appendix A – Business Database

Appendix Table A1: Business Database

Distance	Municipality	Full Address	Business Name
≤500m from site	Niagara Falls	2800 Thorold Townline Rd, Niagara Falls, ON L2E 6S4	Walker Industries - Corporate Headquarters
500m-1000m from site	Niagara Falls	8865 Mountain Road, Niagara Falls, ON L2E6S4	Gauld's Nurseries
1000m-2000m from site	Thorold	3299 Thorold Townline Road, Thorold, ON L0S1A0	Rankin Construction - Thorold Asphalt
1000m-2000m from site	Thorold	3393 Thorold Townline Rd, Thorold, ON L0S	Johnny Rocco’s Pizza wagon
1000m-2000m from site	Thorold	3557 Thorold Townline Road, Thorold, ON L2V3Y5	Niagara Region - Thorold Yard Household Hazardous Waste Drop-Off Depot
1000m-2000m from site	Thorold	1040 Thorold Stone Road, Thorold, ON L2E6S4	Tim Hortons
1000m-2000m from site	Thorold	1108 Beaverdams Road, Thorold, ON L2V3Y7	Thorold Auto Parts and Recycling
1000m-2000m from site	Niagara on the Lake	1 Niagara-on-the-Green Boulevard, Niagara on the Lake, ON L0S1J0	Royal Niagara Golf Club
1000m-2000m from site	Niagara Falls	10056 Thorold Stone Road, Niagara Falls, ON L2E6S4	Boondocks Pet Resort
1000m-2000m from site	Niagara Falls	4680 Thorold Townline Road, Niagara Falls, ON L2E6S4	Beechwood Golf and Country Club
1000m-2000m from site	Niagara Falls	8267 Thorold Stone Road, Niagara Falls, ON L2H1A7	Circle K
1000m-2000m from site	Niagara Falls	2525 Montrose Road, Niagara Falls, ON L2E6S4	Club Italia
1000m-2000m from site	Niagara Falls	8278 Thorold Stone Road, Niagara Falls, ON L2H1A9	Pie Guys Pizzeria
1000m-2000m from site	Thorold	3547 Thorold Townline Road, Thorold, ON L0S1A0	Niagara Region - Service Centre - Traffic, Facilities, Fleet
1000m-2000m from site	Thorold	1040 Thorold Stone Road, Thorold, ON L0S1A0	Petro Canada/Variety Store
1000m-2000m from site	Niagara Falls	8278 Thorold Stone Road, Niagara Falls, ON L2H1A9	Green Island
1000m-2000m from site	Thorold	1051 Old Thorold Stone Road, Thorold, ON L2V3Y5	SilverLine Group Inc.
1000m-2000m from site	St Catharines	570 Glendale Avenue, St Catharines, ON L2R7B3	SpencerARL Niagara Ltd.
1000m-2000m from site	St Catharines	570 Glendale Avenue, St Catharines, ON L2R7B3	General Motors - St. Catharines Propulsion Plant
1000m-2000m from site	Niagara on the Lake	135 Taylor Road, Niagara on the Lake, ON L0S1J0	Niagara College Canada - Daniel J. Patterson (DJP) Campus
1000m-2000m from site	Thorold	3551 Thorold Townline Road, Thorold, ON	Niagara Regional Police - Fleet, Supply
1000m-2000m from site	Niagara Falls	8068 Mountain Road, Niagara Falls, ON L2E6S4	Regency Athletic Resort

Distance	Municipality	Full Address	Business Name
1000m-2000m from site	Thorold	1134 Old Thorold Stone Rd, Thorold, ON L2V 3Y5	Niagara Ready Mix
≤2000m from Walker Campus	Niagara on the Lake	509 Glendale Avenue East, Niagara on the Lake, ON L0S1J0	Firing Industries
≤2000m from Walker Campus	Niagara on the Lake	509 Glendale Avenue East, Niagara on the Lake, ON L0S1J0	Niagara Region - Niagara Emergency Medical Service
≤2000m from Walker Campus	Thorold	1150 Beaverdams Road, Thorold, ON L2V3Y7	Iafrate Machine Works Ltd.
≤2000m from Walker Campus	Thorold	39 Ormond Street North, Thorold, ON L2V1Y9	Tim Hortons
≤2000m from Walker Campus	Thorold	65 Ormond Street North, Thorold, ON L2V1Z3	Losier Insulation Ltd.
≤2000m from Walker Campus	Thorold	45 Ormond Street North, Thorold, ON L2V1Y9	Pizza Pizza
≤2000m from Walker Campus	Thorold	70 Front Street North, Thorold, ON L2V1X6	City of Thorold - Arena
≤2000m from Walker Campus	Thorold	2 Regent Street, Thorold, ON L2V1T1	Bocchinfuso Funeral Home Inc.
≤2000m from Walker Campus	Thorold	12 Regent Street, Thorold, ON L2V1T1	Canal City Realty Ltd.
≤2000m from Walker Campus	Thorold	67 Front Street North, Thorold, ON L2V1X3	Book Depot
≤2000m from Walker Campus	Thorold	19 Front Street North, Thorold, ON L2V1X3	Bezos Bar and Grill Restaurant
≤2000m from Walker Campus	Thorold	20 Pine Street North, Thorold, ON L2V0A1	Thorold Physiotherapy and Rehabilitation
≤2000m from Walker Campus	Thorold	9 Pine Street North, Thorold, ON L2V3Z9	Foodland
≤2000m from Walker Campus	Thorold	9 Pine Street North, Thorold, ON L2V3Z9	Manor Cleaners Ltd.
≤2000m from Walker Campus	Thorold	33 Front Street S, Thorold, ON L2V1W8	JC Patissier
≤2000m from Walker Campus	Thorold	9 Pine Street North, Thorold, ON L2V3Z9	Takeoff Cannabis
≤2000m from Walker Campus	Thorold	9 Pine Street North, Thorold, ON L2V3Z0	Volcano Pizzeria
≤2000m from Walker Campus	Thorold	9 Pine Street North, Thorold, ON L2V3Z9	Pet Valu
≤2000m from Walker Campus	Thorold	9 Pine Street North, Thorold, ON L2V3Z9	Lucy Popoli CA Pro Corp
≤2000m from Walker Campus	Thorold	9 Pine Street North, Thorold, ON L2V3Z9	Rexall Pharma Plus
≤2000m from Walker Campus	Thorold	9 Pine Street North, Thorold, ON L2V3Z9	Pine Street Dental
≤2000m from Walker Campus	Thorold	9 Pine Street North, Thorold, ON L2V3Z9	Douglas G Ralph Family Physician
≤2000m from Walker Campus	Thorold	9 Pine Street North, Thorold, ON L2V3Z9	Water Source

Distance	Municipality	Full Address	Business Name
≤2000m from Walker Campus	Thorold	9 Pine Street North, Thorold, ON L2V3Z9	Elios Foot Comfort Centre
≤2000m from Walker Campus	Thorold	9 Pine Street North, Thorold, ON L2V3Z9	Seafarers International Union of Canada
≤2000m from Walker Campus	Thorold	9 Pine Street North, Thorold, ON L2V3Z9	Studio Nails
≤2000m from Walker Campus	Thorold	9 Pine Street North, Thorold, ON L2V3Z9	Thorold Laundry
≤2000m from Walker Campus	Thorold	9 Pine Street North, Thorold, ON L2V3Z9	Bank of Montreal
≤2000m from Walker Campus	Thorold	9 Pine Street North, Thorold, ON L2V3Z9	Mike's Music
≤2000m from Walker Campus	Thorold	2A Sullivan Avenue, Thorold, ON L2V2X9	Papa Vince Pizza
≤2000m from Walker Campus	Thorold	28 Pine Street South, Thorold, ON L2V3L2	John's Meat Shop
≤2000m from Walker Campus	Thorold	95 Ormond St S, Thorold, ON L2V 3V7	Sto Canada Ltd., Niagara Sales Centre
≤2000m from Walker Campus	Thorold	11 Richmond St, Thorold, ON L2V 3G2	Brians Tire Repairs
≤2000m from Walker Campus	Thorold	1 Albert St W, Thorold, ON L2V 1X9	The Burgh
≤2000m from Walker Campus	Thorold	34 S Pine St S, Thorold, ON L2V 3L2	McDonald’s
≤2000m from Walker Campus	Thorold	133 Front Street North, Thorold, ON L2V0A3	Front Row Sports Excellence
≤2000m from Walker Campus	Thorold	133 Front Street North, Thorold, ON L2V0A3	Big Red Processing and Distribution Centre
≤2000m from Walker Campus	Thorold	55 Pine St N, Thorold, ON L2V 2P2	Original Turtle Printz
≤2000m from Walker Campus	Thorold	30 Queen St N, Thorold, ON L2V 2P8	Epp Track Equipment
≤2000m from Walker Campus	Thorold	35 Albert St W, Thorold, ON L2V 2G4	Crossroads Physiotherapy
≤2000m from Walker Campus	Thorold	29 Pine St S Unit 2, Thorold, ON L2V 3L1	Salon 98
≤2000m from Walker Campus	Thorold	9 Pine St N, Thorold, ON L2V 3Z9	Credit Union Central of Ontario LTD
≤2000m from Walker Campus	Thorold	9 Pine St N Unit 4, Thorold, ON L2V 4J6	Seafarers' International Union Of Canada
≤2000m from Walker Campus	Thorold	9 Pine St N #5, Thorold, ON L2V 3Z9	Quitters Thorold
≤2000m from Walker Campus	Thorold	9 Pine St N #8, Thorold, ON L2V	Elio's Foot Comfort Centre
≤2000m from Walker Campus	Thorold	9 Pine St N, Thorold, ON L2V 3Z0	MoneyGram
≤2000m from Walker Campus	Thorold	9 Pine St N Unit-6, Thorold, ON L2V 3Z0	Pizza Lounge

Distance	Municipality	Full Address	Business Name
≤2000m from Walker Campus	Thorold	9 Pine St N Unit 35, Thorold, ON L2V 3Z9	Lucy Popoli Professional Corporation CPA
≤2000m from Walker Campus	Thorold	5 Metcalfe St, Thorold, ON L2V 2Z6	American Express Global Business Travel
≤2000m from Walker Campus	Thorold	309 Ormond St S, Thorold, ON L2V 3Y1	Tempest Auto
≤2000m from Walker Campus	Thorold	4 Industrial Dr, Thorold, ON L2V 3Y9	Johnny Rag
≤2000m from Walker Campus	Thorold	89 Ormond St S, Thorold, ON L2V 1Y3	Super-1-car sales
≤2000m from Walker Campus	Thorold	36 Cleveland St, Thorold, ON L2V 3K4	Club Capri
≤2000m from Walker Campus	Thorold	61 Ormond St S, Thorold, ON L2V 4X6	Thorold Municipal Housing Corporation
≤2000m from Walker Campus	Thorold	61 Front St S, Thorold, ON L2V 1W8	Mario's Barber Shop
≤2000m from Walker Campus	Thorold	57 Front St S, Thorold, ON L2V 0A7	Low Quantity
≤2000m from Walker Campus	Thorold	51 Front St S, Thorold, ON L2V 1W8	Brigette & Amy
≤2000m from Walker Campus	Thorold	43 Front St S, Thorold, ON L2V 1W8	Angie O'H Antiques
≤2000m from Walker Campus	Thorold	21 Front St S, Thorold, ON L2V 1W8	Thorold Family Medical Centre
≤2000m from Walker Campus	Thorold	21 Front St S, Thorold, ON L2V 1W8	Thorold Medical Centre
≤2000m from Walker Campus	Thorold	15 Front St S, Thorold, ON L2V 1W8	Pharmasave Henderson's
≤2000m from Walker Campus	Thorold	29 Front St S, Thorold, ON L2V 1W8	Steadman Jewellers
≤2000m from Walker Campus	Thorold	13A Albert St W, Thorold, ON L2V 1X3	The Old Fashioned Barbershop
≤2000m from Walker Campus	Thorold	9 Albert St W, Thorold, ON L2V 2G1	Lynyrd Skynart Tattoos
≤2000m from Walker Campus	Thorold	7 Front St S, Thorold, ON L2V 1W8	Goldhawk Accounting & Tax Services
≤2000m from Walker Campus	Thorold	1 Front St S, Thorold, ON L2V 1W8	Harry's New York Bar
≤2000m from Walker Campus	Thorold	3 Front St N, Thorold, ON L2V 1X3	White Galleon
≤2000m from Walker Campus	Thorold	9 Front St N, Thorold, ON L2V 1X3	Glow Hair
≤2000m from Walker Campus	Thorold	9 Front St N, Thorold, ON L2V 1X3	Jazzy Cutz Hair Studio
≤2000m from Walker Campus	Thorold	13 Front St N, Thorold, ON L2V 1X3	Birmingham Fire Control
≤2000m from Walker Campus	Thorold	15 Front St N, Thorold, ON L2V 1X3	Vip Access Home Centre Inc.

Distance	Municipality	Full Address	Business Name
≤2000m from Walker Campus	Thorold	17 Front St N, Thorold, ON L2V 1X3	Superior Plumbing & Heating of Thorold
≤2000m from Walker Campus	Thorold	11 St David's, St David St W, Thorold, ON L2V 2L1	Mike's Auto Service
≤2000m from Walker Campus	St. Catharines	45 Merritt St, St. Catharines, ON L2T 1J4	Dunn Paper
≤2000m from Walker Campus	St. Catharines	45 Merritt St, St. Catharines, ON L2T 1J4	Interlake Acquisition Corporation Limited
≤2000m from Walker Campus	Thorold	33 Pine St S, Thorold, ON L2V 3L1	Beyoutiful Hair Salon
≤2000m from Walker Campus	Thorold	114 Ormond St S #45, Thorold, ON L2V 1Y3	Canal City Cycle
≤2000m from Walker Campus	Thorold	17 Cleveland St, Thorold, ON L2V 3K3	QMastering
≤2000m from Walker Campus	Thorold	86 Pine St S, Thorold, ON L2V 3L7	Strange Beauty Waxing & Sugaring
≤2000m from Walker Campus	Thorold	15 Towpath Street, Thorold, ON L2V 2P5	Ears Canada
≤2000m from Walker Campus	Thorold	11 Towpath Street, Thorold, ON L2V 2P5	Rustic Roots Hair Lounge
≤2000m from Walker Campus	Thorold	11 Towpath Street, Thorold, ON L2V 2P5	Completion Spa
≤2000m from Walker Campus	Thorold	15 Albert St W, Thorold, ON L2V 2G2	Dentistry in Thorold (Formerly Dr. Emilio Raimondo Dental)
≤2000m from Walker Campus	Thorold	19 Albert St W, Thorold, ON L2V 2G2	Community Care Food Bank
≤2000m from Walker Campus	Thorold	29 Albert St W, Thorold, ON L2V 2G2	H&R Block
≤2000m from Walker Campus	Thorold	4 Pine St N, Thorold, ON L2V 2N9	Thorold Veterinary Hospital
≤2000m from Walker Campus	Thorold	20 Pine St N Unit C, Thorold, ON L2V 0A1	Thorold Physiotherapy and Rehabilitation - pt Health
≤2000m from Walker Campus	Thorold	12 Albert St W, Thorold, ON L2V 1X3	The old firehall
≤2000m from Walker Campus	Thorold	133 Front St N Unit 7, Thorold, ON L2V 0A3	Primerica
≤2000m from Walker Campus	Thorold	92 Pine St N, Thorold, ON L2V 2P4	Peninsula Massotherapy Clinic
≤2000m from Walker Campus	Thorold	14 St David St W, Thorold, ON L2V 2K9	Keefer Mansion Inn
≤2000m from Walker Campus	St. Catharines	9 Ball Ave E, St. Catharines, ON L2T 1B4	Ouellette Painting Team
≤2000m from Walker Campus	St Catharines	44 Merritt Street, St Catharines, ON L2T1J5	JLS Auto Service
≤2000m from Walker Campus	St Catharines	16 Merritt Street, St Catharines, ON L2T1J3	Accent Art Gallery and Frame Shop
≤2000m from Walker Campus	St Catharines	2 Merritt Street , St Catharines, ON L2T1J3	Early Bird

Distance	Municipality	Full Address	Business Name
≤2000m from Walker Campus	St Catharines	17 Townline Road East, St Catharines, ON L2T1A1	Townline Discount
≤2000m from Walker Campus	Thorold	111 Ormond Street North, Thorold, ON L2V1Y9	Thorold Auto and Service Center
≤2000m from Walker Campus	Thorold	105 Ormond St N, Thorold, ON L2V 1Z3	Invicta Handyman
≤2000m from Walker Campus	Thorold	89 Ormond St N, Thorold, ON L2V 1Z3	ARS Used Car Sale
≤2000m from Walker Campus	Thorold	89 Ormond St N #20, Thorold, ON L2V 1Z3	905 Auto Sales Inc.
≤2000m from Walker Campus	Thorold	89 Ormond St N, Thorold, ON L2V 1Z3	Ben auto sale
≤2000m from Walker Campus	Thorold	89 Ormond St N, Thorold, ON L2V 1Z3	Bello Fine Motors
≤2000m from Walker Campus	Thorold	65 Ormond Street North, Thorold, ON L2V1Z3	Dream Ironworks
≤2000m from Walker Campus	Thorold	110 Front Street North, Thorold, ON L2V4R5	Julies Tire and Auto
≤2000m from Walker Campus	Thorold	65 Ormond Street North, Thorold, ON L2V1Z3	CH Plumbing
≤2000m from Walker Campus	Thorold	61 Ormond Street North, Thorold, ON L2V1Z3	Ken Cosgrove Auto Repair and Machine
≤2000m from Walker Campus	Thorold	60 Ormond Street North, Thorold, ON L2V1Z2	Roadway Friendship Inn
≤2000m from Walker Campus	Thorold	55 Ormond Street North, Thorold, ON L2V1Y9	Kenirys Service Station
≤2000m from Walker Campus	Thorold	55 Ormond St N, Thorold, ON L2V 1Y9	T Dot Auto Sales & Service
≤2000m from Walker Campus	Thorold	45 Ormond Street North, Thorold, ON L2V1Y9	iTan Lounge
≤2000m from Walker Campus	Thorold	45 Ormond Street North, Thorold, ON L2V1Y9	F Y I Doctors Thorold
≤2000m from Walker Campus	Thorold	45 Ormond St N, Thorold, ON L2V 1T2	Shear Envy Salon
≤2000m from Walker Campus	Thorold	54 Front Street North, Thorold, ON L2V1X5	Jo's Auto Center
≤2000m from Walker Campus	Thorold	50 Front Street N, Thorold, ON L2V1X5	Coconut Cannabis
≤2000m from Walker Campus	Thorold	46 Front Street North, Thorold, ON L2V1X5	Thorold Fish and Chips
≤2000m from Walker Campus	Thorold	36 Front Street South, Thorold, ON L2V1X5	Salon 48
≤2000m from Walker Campus	Thorold	36 Front St N, Thorold, ON L2V 1X5	Taylor and Co. Salon
≤2000m from Walker Campus	Thorold	44 Front St N, Thorold, ON L2V 1X5	Glamour Nails and Spa
≤2000m from Walker Campus	Thorold	32 Front St N, Thorold, ON L2V 1X3	LEW'S pizza+wings+things

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≤2000m from Walker Campus	Thorold	26 Front Street North, Thorold, ON L2V1X5	Cosmo's Diner
≤2000m from Walker Campus	Thorold	18 Front Street North, Thorold, ON L2V1X4	The Post Office
≤2000m from Walker Campus	Thorold	16 Front Street North, Thorold, ON L2V1X4	Front Variety
≤2000m from Walker Campus	Thorold	6 Front St N, Thorold, ON L2V 1X3	Pretty Potions Apothecary
≤2000m from Walker Campus	Thorold	14 Front Street North, Thorold, ON L2V1X4	Griffiths Performance Physiotherapy
≤2000m from Walker Campus	Thorold	6 Front St N, Thorold, ON L2V 1X3	Jay Kay & Co.
≤2000m from Walker Campus	Thorold	6 Front Street North, Thorold, ON L2V1X3	Gaming Gators
≤2000m from Walker Campus	Thorold	2 Front Street North, Thorold, ON L2V1X4	Niagara River Lions
≤2000m from Walker Campus	Thorold	18 Albert Street East, Thorold, ON L2V1P1	Young Mcnamara Barristers and Solicitors
≤2000m from Walker Campus	Thorold	26 Albert Street East, Thorold, ON L2V2E9	Pearl Hair Studio
≤2000m from Walker Campus	Thorold	24 Albert St E, Thorold, ON L2V 1P1	Dr. Gerald Kandasamy Family Physician
≤2000m from Walker Campus	Thorold	28 Albert Street East, Thorold, ON L2V1P1	EXP
≤2000m from Walker Campus	Thorold	30 Albert Street East, Thorold, ON L2V1P1	Stay at Home Nursing Care Services
≤2000m from Walker Campus	Thorold	10 Ormond Street North, Thorold, ON L2V1Y7	Cobblestone Gardens Retirement Residence
≤2000m from Walker Campus	Thorold	4 Front Street South, Thorold, ON L2V1W9	Summit Place Tavern
≤2000m from Walker Campus	Thorold	8 Front Street South, Thorold, ON L2V1W9	Hana's Place Restaurant
≤2000m from Walker Campus	Thorold	12 Front Street South, Thorold, ON L2V1W9	Front Street Laundromat
≤2000m from Walker Campus	Thorold	16 Front Street South, Thorold, ON L2V1W8	Creata Beauty
≤2000m from Walker Campus	Thorold	16 Front St S, Thorold, ON L2V 1W8	AURA Aesthetics & Wellness
≤2000m from Walker Campus	Thorold	24 Front Street South, Thorold, ON L2V1W8	Vanity Salon
≤2000m from Walker Campus	Thorold	24 Front Street S, Thorold, ON L2V1W8	Aesthetics by Alyssa
≤2000m from Walker Campus	Thorold	28 Front St S, Thorold, ON L2V 1W9	Sweet Celebrations Patisserie
≤2000m from Walker Campus	Thorold	30 Front Street S, Thorold, ON L2V1W9	Creekview Floral Co.
≤2000m from Walker Campus	Thorold	32 Front Street South, Thorold, ON L2V1W9	Impact Promotions

Distance	Municipality	Full Address	Business Name
≤2000m from Walker Campus	Thorold	36 Front Street South, Thorold, ON L2V1W9	Carbon Salon
≤2000m from Walker Campus	Thorold	40 Front Street South, Thorold, ON L2V1W9	Figg Street Co.
≤2000m from Walker Campus	Thorold	46 Front Street South, Thorold, ON L2V1X5	Rock and Roll Hair Studio
≤2000m from Walker Campus	Thorold	46B Front Street S, Thorold, ON L2V1W9	Making Waves Beauty
≤2000m from Walker Campus	Thorold	50 Front Street South, Thorold, ON L2V1W9	Coatesy's Kitchen
≤2000m from Walker Campus	Thorold	50 Front Street South, Thorold, ON L2V1W9	Suite Trip Travel
≤2000m from Walker Campus	Thorold	52 Front St S, Thorold, ON L2V 1W9	Smilee Dental Centre
≤2000m from Walker Campus	Thorold	4 Sullivan Ave, Thorold, ON L2V 2X9	Thorold Family Dental
≤2000m from Walker Campus	Thorold	6 Clairmont Street, Thorold, ON L2V1R1	Peace Medical Clinic
≤2000m from Walker Campus	Thorold	6 Clairmont Street, Thorold, ON L2V1R1	Fascination Dance Studio
≤2000m from Walker Campus	Thorold	6 Clairmont Street, Thorold, ON L2V1R1	Pharmaviva Pharmacy
≤2000m from Walker Campus	Thorold	8 Clairmont Street, Thorold, ON L2V1R1	Jurmain Law Office
≤2000m from Walker Campus	Thorold	8 Clairmont Street, Thorold, ON L2V1R1	Canada Post
≤2000m from Walker Campus	Thorold	8 Clairmont Street, Thorold, ON L2V1R1	Pampered Peach
≤2000m from Walker Campus	Thorold	8 Clairmont Street, Thorold, ON L2V1R1	Gibson Driver Education
≤2000m from Walker Campus	Thorold	8 Clairmont Street, Thorold, ON L2V1R1	Subway
≤2000m from Walker Campus	Thorold	18 Clairmont Street, Thorold, ON L2V1R1	Pho 18
≤2000m from Walker Campus	Thorold	8 Clairmont Street, Thorold, ON L2V1R1	Ideal Plumbing and Heating
≤2000m from Walker Campus	Thorold	1 Ormond Street South, Thorold, ON L2V3Y7	Niagara Regional Labour Council
≤2000m from Walker Campus	Thorold	3 Ormond Street South, Thorold, ON L2V1X9	Royal Canadian Legion Branch 17
≤2000m from Walker Campus	Thorold	6 Ormond St S, Thorold, ON L2V 1Y3	Hannah's Euro Spa
≤2000m from Walker Campus	Thorold	6 Ormond Street South, Thorold, ON L2V1Y1	Zen Massage and Nutrition
≤2000m from Walker Campus	Thorold	54 Front Street South, Thorold, ON L2V1X1	Donnelly's Pub
≤2000m from Walker Campus	Thorold	54 Front Street South, Thorold, ON L2V1X1	The Moose and Goose

Distance	Municipality	Full Address	Business Name
≤2000m from Walker Campus	Thorold	7 Clairmont Street, Thorold, ON L2V1R2	Canadian Corps Unit 44
≤2000m from Walker Campus	Thorold	17 Clairmont Street, Thorold, ON L2V1R2	7 Eleven
≤2000m from Walker Campus	Thorold	64 Front St S, Thorold, ON L2V 4B3	Sandy's Hotpot
≤2000m from Walker Campus	Thorold	26 Ormond Street South, Thorold, ON L2V1Y4	Haine Funeral Home and Chapel
≤2000m from Walker Campus	Thorold	54 Ormond Street South, Thorold, ON L2V1Y5	MOTORAMA
≤2000m from Walker Campus	Thorold	90 Ormond Street South, Thorold, ON L2V3Y9	The Beer Store
≤2000m from Walker Campus	Thorold	96 Ormond Street South, Thorold, ON L2V4V6	Hartzel Auto and Marine
≤2000m from Walker Campus	Thorold	100 Ormond Street South, Thorold, ON L2V1Y5	Ipoly
≤2000m from Walker Campus	Thorold	106 Ormond Street South, Thorold, ON L2V2Y6	GMC Detailing and Car Care
≤2000m from Walker Campus	Thorold	106 Ormond Street South, Thorold, ON L2V1Y5	BTO Performance Group and Personal Training
≤2000m from Walker Campus	Thorold	106 Ormond Street S, Thorold, ON L2V3W1	Lakeside Electrical
≤2000m from Walker Campus	Thorold	110 Ormond Street South, Thorold, ON L2V4J6	Ruskcast Inc.
≤2000m from Walker Campus	Thorold	112 Ormond St S, Thorold, ON L2V 3Y1	Broz Motors CAR - RENTALS
≤2000m from Walker Campus	St. Catharines	74 Townline Rd W, St. Catharines, ON L2T 1P6	Back to the Earth Naturals Inc.
≤2000m from Walker Campus	Thorold	21 Carleton St S, Thorold, ON L2V 1Z7	Lock Seven Landscaping
≤2000m from Walker Campus	Thorold	41 Carleton St S #1, Thorold, ON L2V 1Z7	Bailey's.MRP Inc.
≤2000m from Walker Campus	Thorold	28 Welland St S, Thorold, ON L2V 2B4	Topos Canada Inc.
≤2000m from Walker Campus	Thorold	8 Welland St S, Thorold, ON L2V 2B4	barry smith photoart
≤2000m from Walker Campus	Thorold	41 Welland St S, Thorold, ON L2V 2B6	Robinsong Bed and Breakfast
≤2000m from Walker Campus	Thorold	28 Chapel St S, Thorold, ON L2V 2C6	Sweet Suite at Lock 7
≤2000m from Walker Campus	Thorold	24 Chapel Street South, Thorold, ON L2V2C6	The Inn at Lock Seven
≤2000m from Walker Campus	Thorold	8 Carleton Street South, Thorold, ON L2V5C2	Thorold Senior Centre
≤2000m from Walker Campus	Thorold	2 Carleton St S, Thorold, ON L2V 1Z5	The Thorold Museum Administration Office
≤2000m from Walker Campus	Thorold	12 Chapel St S, Thorold, ON L2V 2C4	OG Plumbing and Drain Cleaning

Distance	Municipality	Full Address	Business Name
≤2000m from Walker Campus	Thorold	120 Wellington Street N, Thorold, ON L2V5E7	Gospel BBQ
≤2000m from Walker Campus	Thorold	120 Wellington Street North, Thorold, ON L2V5E7	VDC Canada
≤2000m from Walker Campus	Thorold	120 Wellington St N Unit 8, Thorold, ON L2V 5E7	Dragonfly
≤2000m from Walker Campus	Thorold	120 Wellington St N, Thorold, ON L2V 5E7	Bush Moving & Storage
≤2000m from Walker Campus	Thorold	3551 Leslie Street, Thorold, ON L2V3Y7	Steed and Evans Ltd.
≤2000m from Walker Campus	Thorold	1281 Old Thorold Stone Rd Unit #1, Thorold, ON L2V 3Y7	MRP Reinforcing Inc
≤2000m from Walker Campus	Thorold	1281 Old Thorold Stone Road, Thorold, ON L2V3Y7	Inland Truck and Trailer Ltd.
≤2000m from Walker Campus	Thorold	3363 Davis Rd, Thorold, ON L2V 1J1	Kapacity Storage and Distribution
≤2000m from Walker Campus	Thorold	3363 Davis Rd, Thorold, ON L2V 1J1	Destiny Copper
≤2000m from Walker Campus	Thorold	223 Niagara Falls Rd, Thorold, ON L2V 1J1	ATLAS KINGS
≤2000m from Walker Campus	Thorold	225 Niagara Falls Rd, Thorold, ON L2V 1J1	GMC Aluminum Products
≤2000m from Walker Campus	St. Catharines	424 Glendale Ave, St. Catharines, ON L2P 3Y3	SOS Towing
≤2000m from Walker Campus	St Catharines	424 Glendale Avenue, St Catharines, ON L2P3Y3	Glendale Metals
≤2000m from Walker Campus	St Catharines	508 Glendale Avenue, St Catharines, ON L2P3Y3	St. Lawrence Seaway Management Corporation
≤2000m from Walker Campus	Niagara on the Lake	253 Taylor Road, Niagara on the Lake, ON L0S1J0	White Oaks Resort
≤2000m from Walker Campus	Niagara on the Lake	137 Taylor Rd, Niagara-on-the-Lake, ON L0S 1J0	Residence & Conference Centre - Niagara-on-the-Lake
≤2000m from Walker Campus	Niagara Falls	2205 Mewburn Rd, St. Davids, ON L2E 6S4	Vintage Niagara Wine Tours
≤2000m from Walker Campus	Niagara Falls	2205 Mewburn Rd #2, Niagara Falls, ON L2E 6S4	Bootleggers Niagara Beer Tours
≤2000m from Walker Campus	Niagara Falls	8168 Mountain Rd, Niagara Falls, ON L2H 0V2	Construction Works Roofing Ltd
≤2000m from Walker Campus	Niagara Falls	2600 Montrose Rd, Niagara Falls, ON L2H 3G2	SHADY OAKS MOBILE PARK
≤2000m from Walker Campus	Niagara Falls	8108 Mt Carmel Blvd, Niagara Falls, ON L2H 2Y8	Impression Recording Studio
≤2000m from Walker Campus	Niagara Falls	8018 Cathedral Dr, Grand Island, ON L2H 2Z2	5aab Fashion
≤2000m from Walker Campus	Niagara Falls	3358 Matthews Dr, Niagara Falls, ON L2H 2Z3	DiBellonia Swim School