

Appendix F-11

**Economic Environment Existing Conditions
Report**

Draft Economic Existing Conditions Report

Walker South Landfill Phase 2 Environmental Assessment

JUNE 2026

AVAANZ LTD



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Walker South Landfill Phase 2
Environmental Assessment



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June 25, 2026

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Dear Mr. Darren Fry:

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

Sincerely,
Avaanz Ltd.



Angus Keir
Principal
Avaanz Ltd

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- Appendix C. Interview Plan and Guides

Glossary and Abbreviations

The following abbreviations and terms are used in this report.

Abbreviation / Term	Definition
AAQC	Ambient Air Quality Criteria; the maximum airborne contaminant concentrations established by the MECP
AMO	Association of Municipalities of Ontario
CMA	Census Metropolitan Area; a Statistics Canada geographic unit
CMHC	Canada Mortgage and Housing Corporation
CREA	Canadian Real Estate Association
EA	Environmental Assessment
ECA	Environmental Compliance Approval, issued under Ontario's environmental legislation
FIR	Financial Information Return; the annual municipal financial report filed with the Province of Ontario
GDP	Gross Domestic Product; the value of final goods and services produced in an economy over a given period (reported here at basic prices)
GTA	Greater Toronto Area
HPI	Home Price Index; a benchmark measure of home prices
IC&I	Industrial, Commercial and Institutional; a category of non-residential waste
LSA	Local Study Area
MECP	Ontario Ministry of the Environment, Conservation and Parks
MLS®	Multiple Listing Service; a real estate sales database
MMAH	Ontario Ministry of Municipal Affairs and Housing
NAICS	North American Industry Classification System
NAR	Niagara Association of Realtors
NNA	Near-Neighbour Area; the 2-kilometre radius around the Walker Resource Management Campus
NOC	National Occupational Classification
NROP	Niagara Region Official Plan
OU	Odour Unit; a measure of odour concentration
QEW	Queen Elizabeth Way
RSA	Regional Study Area
SSA	Site Study Area; applied consistently across all technical disciplines for the EA
ToR	Terms of Reference; the approved scope for the Environmental Assessment
TPN	Tourism Partnership of Niagara
TSP	Total Suspended Particulate; airborne dust assessed against the AAQC

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.

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. 0084-78RKAM, 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 m³ and is anticipated to reach 99 percent of approved capacity by July 1, 2030 (WSP Canada, 2026).

The proposed Phase 2 of the South Landfill would extend its approved capacity by approximately 18-20 million m³ 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 characterising the existing conditions within the study areas for the South Landfill Phase 2 EA for economics.

2. Study Areas

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

Site Study Area (SSA)

The Site Study Area (SSA) is consistent across all technical disciplines and encompasses a total of 81.30 ha of land owned and operated by Walker. The SSA includes the current quarry extraction limit and encompasses the proposed Limit of Fill, the buffer area, and aligns with the proposed Waste Disposal Site Boundary Limits per the Facility Characteristics Report.

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. Catharines; and
- City of Thorold.

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

Near-Neighbour Area (NNA)

The Near-Neighbour Area (NNA) is the 2-kilometre radius around the Phase 2 perimeter of fill area.

Regional Study Area (RSA)

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

Rationale for Study Area Selection

The selection of study areas is based on functional and geographic considerations, designed to capture the varying degrees of potential effects of the proposed undertaking on the four evaluation criteria established in the approved ToR: local economy, property values, public finance, and cost of services. Each study area reflects the spatial scope within which specific effects may take place, ensuring a comprehensive assessment while maintaining a targeted focus. The SSA is established consistently across all technical disciplines and corresponds to the proposed Waste Disposal Site Boundary Limits; its selection is therefore common to the EA rather than specific to this assessment. The rationale for the selection of the LSA, NNA, and RSA is described in the following paragraphs.

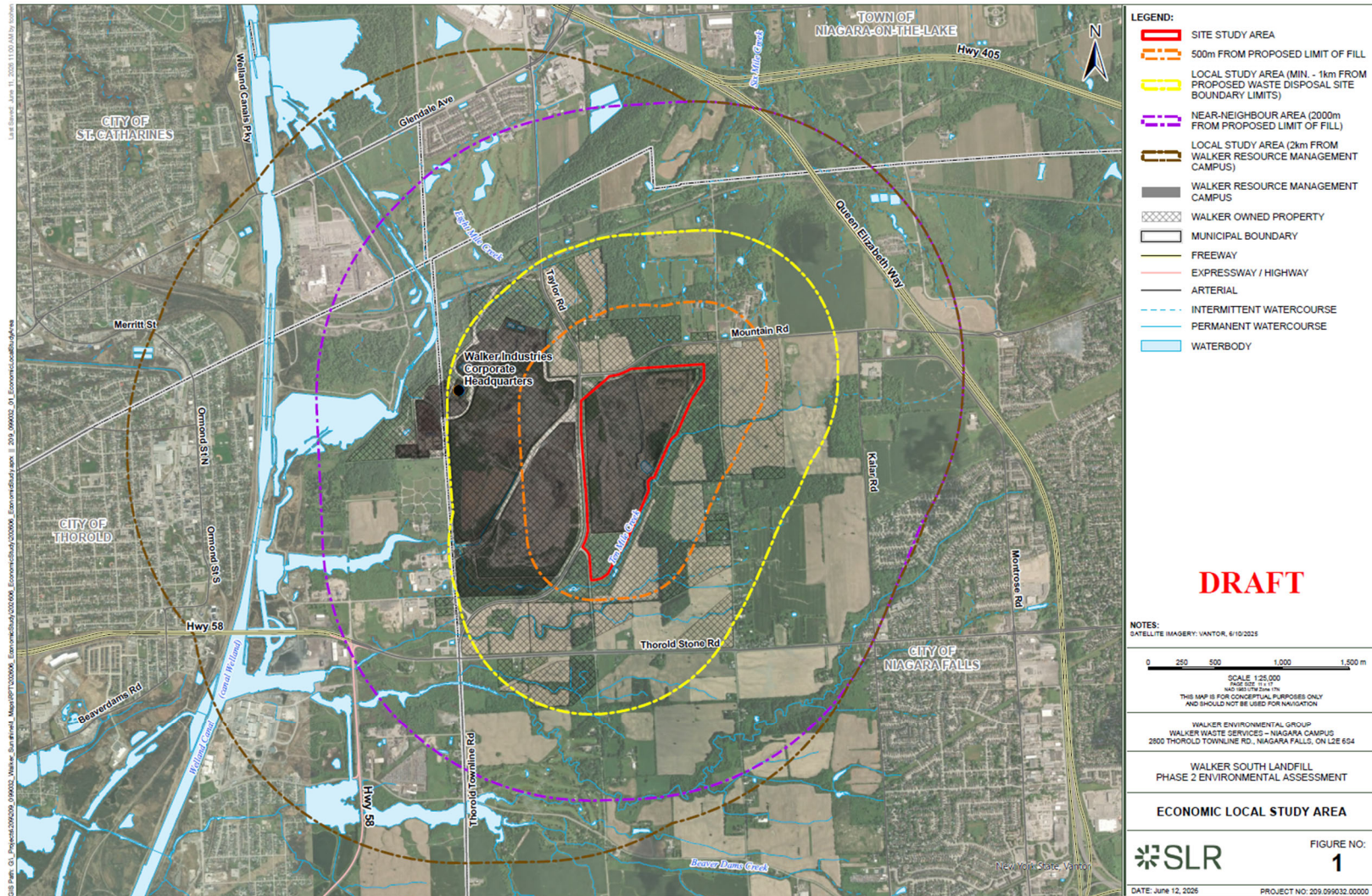
The LSA encompasses the four lower-tier municipalities within proximity of the Walker Resource Management Campus. The inclusion of the City of Niagara Falls, Town of Niagara-on-the-Lake, City of St. Catharines, and City of Thorold ensures that effects on the local economy and public finance are assessed within the jurisdictions most likely to be affected by the proposed undertaking.

For the assessment of property value and business indicators, the LSA is restricted to the 2-kilometre radius around the boundaries of the Walker Resource Management Campus. This is the area within which there is the greatest potential for nuisance effects such as dust, odour, and noise, which could detrimentally affect property values and business activity in the vicinity of the site.

The NNA identifies the businesses and properties closest to the proposed undertaking, where any nuisance-related effects would be expected to be most pronounced. It is defined as the 2-kilometre radius around the Phase 2 perimeter of fill area in order to centre this characterisation on the proposed undertaking itself rather than the broader Walker Resource Management Campus.

The RSA encompasses Niagara Region, capturing the broader market and economic influences relevant to the local economy, property values, and cost of services criteria. For the evaluation of public finance, the RSA is the Regional Municipality of Niagara, the upper-tier jurisdiction whose finances may be affected by the proposed undertaking. As the RSA corresponds to the established administrative boundary of Niagara Region, it is identified by jurisdiction rather than delineated on project mapping.

Figure 1: LSA 2-Kilometre Radius Around Walker Resource Management Campus



3. Methodology

This section describes the methodology used to characterise the existing economic environment. The methodology undertaken is organised by topic in the text that follows.

3.1 Local Economy

3.1.1 Labour Force Characteristics

Resident labour force characteristics data for the LSA and RSA were collected from the 2021 Census of the Population (Statistics Canada, 2023a). Data collected included population 15 years and over, population in the labour force, participation rate, employed, unemployed, and unemployment rate. The LSA's share of the RSA working-age population was calculated to assess the representativeness of local labour market conditions at the regional scale. Employment change between the 2016 and 2021 Census periods was calculated to establish the trajectory of employment across LSA municipalities (Statistics Canada, 2017) (Statistics Canada, 2023a). Labour Force Survey data for the St. Catharines–Niagara Census Metropolitan Area (CMA) were also analysed to provide more recent context for regional labour market conditions since 2021 (Statistics Canada, 2026a).

3.1.2 Occupations

Jobs data at the 1-digit National Occupational Classification (NOC) level were collected for the LSA and RSA from Lightcast (2025a). The occupational distribution was analysed by municipality to characterise the structure of the local labour market. Employment change by occupation over the period 2018 to 2024 was then examined to assess how the labour market is shifting across occupational categories. 2024 average wages by occupation were also examined. Total employment trends over the period 2011 to 2024 were reviewed provide broader context for trends in local and regional employment. Interviews with labour, business, economic development, and tourism organisations across the study area provided qualitative context on workforce availability, labour supply constraints, and hiring conditions.

3.1.3 Commuting Flows

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

3.1.4 Businesses

Business counts were collected for the LSA and RSA from Lightcast (2025b) disaggregated by employee status (with and without employees). This data was used to establish the distribution and scale of the commercial base across the LSA and RSA. Major private employers within the RSA

were identified using data from Niagara Economic Development (2024b) to identify the concentration of significant employers within the LSA.

3.1.5 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 (2025c), (2025d). This data was used to assess the composition of the local and regional economies, examining employment distribution across industries, employment change over the period 2018 to 2024, wage levels, and the distribution and growth of total industry sales over the period 2011 to 2023. Interviews with business associations and chambers of commerce provided qualitative context on current business conditions, cost pressures, trade uncertainty, and sector-specific performance.

3.1.6 Tourism

Tourism employment and sales data for the LSA and RSA were collected from Lightcast (2025c) (2025d) using sector definitions based on Statistics Canada's Canadian Tourism Satellite Account framework, aggregated into five industry categories at the 4-digit NAICS level with the addition of beverage manufacturing (Niagara Economic Development, 2019). The sector aggregation and related NAICS codes are presented in **Table 1**. This data was used to assess the structure and trends of the local tourism economy, examining employment change by sector over the period 2018 to 2024, wage levels, tourism sales distribution between study areas in 2023, and sales trends over the period 2011 to 2023. Provincial visitor data from the Ministry of Tourism, Culture and Sport (2023) and regional tourism statistics from Niagara Economic Development (2026a) were used to characterise visitor composition and seasonal patterns. Interviews with tourism and economic development organisations provided qualitative context on visitor trends, seasonal patterns, operating conditions, workforce challenges, and the sector outlook across the study area. Regional tourism organisation and municipal strategic plans were reviewed to characterise the geographic differentiation of tourism offerings across LSA municipalities (Tourism Partnership of Niagara, 2024), (Town of Niagara-on-the-Lake, n.d.) (City of St. Catharines, n.d.) (City of Thorold, n.d.).

Table 1: Tourism Industry Sector Category Aggregation, 4-Digit NAICS

Tourism Industry Sector Category	4-Digit NAICS
Accommodation and Hospitality	<ul style="list-style-type: none"> • 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

Tourism Industry Sector Category	4-Digit NAICS
Arts, Entertainment, and Recreation	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 5615 Travel arrangement and reservation services
Beverage Manufacturing	<ul style="list-style-type: none"> 3121 Beverage manufacturing

Source: (Niagara Economic Development, 2019)

3.1.7 Farms

Farm industry employment, average wages, and sales data for the LSA and RSA were collected from Lightcast (2025c), (2025d) to assess employment change over the period 2018 to 2024, wage levels, farm sales distribution between study areas in 2023, and sales trends over the period 2011 to 2023. Farm counts, acreage, and gross farm receipts at the municipal level were drawn from the 2021 Census of Agriculture (Statistics Canada, 2023) to establish the geographic distribution of agricultural activity across the LSA. Regional agricultural structure, productivity, and GDP impact were drawn from the Niagara Economic Development agriculture profiles (2022) (2018) to characterise sector composition and assess consolidation trends from 2011 to 2021. Interviews with tourism and economic development organisations provided qualitative context on the role of agritourism and the integration between agricultural and tourism activity within the study area.

3.1.8 Gross Domestic Product (GDP)

CMA-level GDP at basic prices (2017 dollars) from Q3 2023 to Q3 2025 was obtained from the Niagara Region's Economic Update report (2026a), which draws on Conference Board of Canada data. Because GDP is not published at the municipal level, municipal estimates were produced by apportioning CMA GDP according to each municipality's share of total industry wages. Wage data were sourced from the Lightcast input-output model (2025d) for 2023 and 2024; 2025 wages were calculated by multiplying Lightcast industry jobs by average wages (2025c). These estimates were

used to assess GDP levels and growth across the LSA from Q3 2023 to Q3 2025, and to compare local trajectories against the CMA benchmark.

3.1.9 Distribution of Household Expenditures

The provincial-level distribution of household expenditures across consumption categories was obtained from Statistics Canada (Statistics Canada, 2026b). Ontario is the smallest geography for which Statistics Canada publishes the household expenditure profile, and the Ontario distribution is therefore used as a proxy for spending patterns in the LSA and RSA. The dollar values reported in the source table were converted into percentage shares of total current consumption, with income taxes, personal insurance and pension contributions, and gifts and charitable contributions removed from the denominator. The detailed spending categories were aggregated into nine consumption buckets (Food; Shelter; Household operations and furnishings; Clothing and accessories; Transportation; Health and personal care; Recreation; Education; and Other), with the resulting percentages summing to 100 percent across these buckets.

3.2 Property Values

3.2.1 Neighbourhood Profiles

Characterisation of distinct neighbourhoods within the LSA were drawn from real estate brokerage profiles (Remax Hendriks Team Realty, 2026a-d) as well as other published information where available (Hardaker, 2023). Each neighbourhood was geographically delineated within the 2-kilometre boundary of the LSA with reference to municipalities, roads, and features.

3.2.2 Property Sales Data

Property sales data for single-family detached homes within the LSA were obtained from Teranet's Geowarehouse (2026) including sale date, price, and lot size for the period January 1, 2009 to November 30, 2023, preceding the South Landfill Phase 2 announcement. Number of sales, lot-size statistics (minimum, maximum, mean, median square footage/acreage), and annual mean sale prices were calculated for each of the defined neighbourhood units. The analytical area is bounded by the LSA perimeter.

Niagara-on-the-Green: a subdivision in the Glendale planning area of the Town of Niagara-on-the-Lake, bounded by Glendale Avenue to the north, Taylor Road to the west, and the Royal Niagara Golf Club to the south. Niagara-on-the-Green is fully within the perimeter of the LSA.

Rural Residential: properties with single-family dwellings on lots of five acres or less, more than 100 metres from the urban fringe, spanning portions of the City of Niagara Falls, Town of Niagara-on-the-Lake, and City of Thorold. Rural residential covers properties within the Rural Area as defined in the Niagara Region Official Plan as well as single family residential properties within the City of Niagara Falls's Northwest Secondary Plan area that currently function as rural-residential in character despite the area's Designated Greenfield status (brought into the City's urban boundary

in November 2022 but remaining predominantly agricultural in character). The analytical area is bounded by the 2-kilometre LSA perimeter.

Mount Carmel: there are two analytical areas first the interior residential portion of Mount Carmel in the City of Niagara Falls, set back from Kalar Road and bounded by Shriner's Woodlot Park to the south, the Northwest Secondary Plan area to the north, and the 2-kilometre LSA perimeter to the east. Properties fronting Kalar Road and the connecting Vegter Court cul-de-sac were analysed separately as an urban-boundary cluster.

Thorold South: neighbourhood in the City of Thorold, bounded by the Welland Canal to the west and Highway 58 to the north; the analytical area is limited to only the northeastern portion of the neighbourhood falling within the 2-kilometre LSA.

Downtown Thorold and Merritton St. Catharines: the City of Thorold's urban core immediately west of the Welland Canal and the adjacent Merritton in the City of St. Catharines, with the analytical area bounded to the west by the 2-kilometre LSA radius.

3.2.3 Real Estate Market

Information was collected from annual real estate market reports published by McGarr Realty Corp. (2019-2024) and Bosley Real Estate (2025-2026) which report Multiple Listing Service (MLS®) data for the Niagara Region. The analysis focused on detached home sales, examining annual sales volumes and average sales prices for the LSA and RSA over the period 2018 to 2025. The MLS® Home Price Index Benchmark Price for single-family detached homes was obtained from Canadian Real Estate Association (CREA) (2026a) to place RSA price trends within the provincial trajectory over a twenty-year period (2005-2025). Compiled market narratives from the Niagara Association of REALTORS monthly reports (2020; 2023a; 2023b) provided regional market commentary across the baseline period. Institutional context on housing market conditions was drawn from Canada Mortgage and Housing Corporation (CMHC) Housing Market Outlook reports (2018; 2022, 2023) and Central 1 Credit Union provincial economic analyses (2022; 2024). Bank of Canada interest rate data was used to track monetary policy over the baseline period, with national market context from the CREA (2025; 2026b) and RBC Economics (2025). Interviews with real estate professionals provided qualitative context on current market conditions, geographic variation within the LSA, inventory levels, and housing type performance across the study area.

3.3 Public Finance

Financial data for the four municipalities constituting the LSA, the Regional Municipality of Niagara (RSA) were obtained from multi-year and individual 2024 Financial Information Return (FIR) reports published by the Ontario Ministry of Municipal Affairs and Housing (MMAH). This data was used to assess the fiscal capacity of municipalities within the study areas. Additionally, population, households, and building permit data were collected from multi-year FIR reports for each of the municipalities in Niagara Region.

Population and household counts for 2018 and 2024 were examined for each LSA municipality and the RSA to establish the scale and distribution of demand for municipal services and to assess

whether housing supply kept pace with demographic expansion. Building permit data, including the total number and value of permits issued between 2018 and 2024, were analysed for both the LSA and RSA to characterise the pace of construction activity over the period.

Tax base composition was examined using 2024 taxable assessment disaggregated by property class (residential, farmland, and other) to establish each municipality's capacity to raise tax revenue and the concentration of non-residential assessment within the LSA relative to the RSA. Revenue structure was examined for the same year, distinguishing own-source income (property taxes, user fees, and other revenues) from government transfers to determine how sensitive each municipality's budget is to changes in its local tax base and economic activity.

Tax ratios established by the Regional Municipality of Niagara for each property class (Niagara Region, 2025a) and the corresponding 2025 total tax rates published by the City of Niagara Falls (City of Niagara Falls, n.d.) were compiled to document the relative tax burden across landfill, industrial, aggregate extraction applicable to the Walker Resource Management Campus.

Financial performance was assessed using four indicators obtained from FIR data: the current ratio, measuring a municipality's ability to meet short-term obligations; the debt service coverage ratio, measuring capacity to service debt payments; the operating surplus ratio, indicating the share of revenue available for reserves, capital investment, and debt repayment; and the asset consumption ratio, indicating the extent to which municipal infrastructure has been depreciated. Each indicator was evaluated against benchmarks. Tangible capital assets were disaggregated into general capital assets, infrastructure, and construction in progress to characterise each municipality's built form, and asset sustainability ratios were calculated by comparing annual capital additions and betterments against annual amortization to assess whether each municipality is reinvesting in its capital base at a rate that exceeds depreciation.

Environmental services expenditures reported in FIR reports, encompassing water, wastewater, stormwater, and solid waste services, were examined alongside total operating expenses to establish the cost burden of environmental services at both the lower-tier and regional level. For the Regional Municipality of Niagara, allocations to solid waste disposal and wastewater treatment were separately identified. The financial relationship between landfill operations and the municipal wastewater system was documented, including Walker's average annual leachate discharge volumes into Niagara-on-the-Lake's sanitary sewer system, applicable wastewater rates (Town of Niagara-on-the-Lake, 2025), and the resulting revenue to the Town. The gap between the Region's full-cost-recovery rate for waste disposal and its current tipping fee was assessed, and the adequacy of the landfill liability reserve was examined, using data from Niagara Region (2023) (2024). Infrastructure funding gaps were drawn from asset management plans including the four LSA municipal plans (City of Niagara Falls, 2025) (City St Catherines, 2025) (City of Thorold, 2025) (Town of Niagara-on-the-Lake) and the Niagara Region's 2025 Corporate Asset Management Plan (Niagara Region, 2025b).

3.4 Cost of Services

Provincial waste generation and landfill capacity data were obtained from the Waste to Resource Ontario 2025 State of Waste in Ontario: Landfill Report (Waste to Resource Ontario, 2025). Data on Ontario waste exports to the United States, including destination state shares, were obtained from the Association of Municipalities of Ontario (AMO, 2023). Niagara regional waste disposal facility data, including landfill capacities, approved waste receipt volumes, and partnership arrangements, were obtained from GHD's Waste Management Strategic Plan (GHD, 2024a) and from Walker Environmental Group (Walker, 2024c).

Current gate rates for South Landfill and Niagara Region landfills were obtained from organisation websites. IC&I disposal rates at public-sector facilities accepting bulk commercial waste were obtained from the Essex-Windsor Solid Waste Authority (2025) and the City of London (2025). Ontario private-sector bulk disposal rates are not publicly disclosed. Because Ontario private landfills near the border compete with Michigan facilities for waste from Ontario generators, the all-in delivered cost of cross-border disposal provides a proxy for the competitive ceiling on private rates in that region. To construct this proxy, documented tipping fees at Michigan landfills receiving Canadian waste were collected, converted to Canadian dollars, and combined with round-trip haulage costs and Blue Water Bridge tolls (Federal Bridge Corporation, 2026) (Michigan Department of Transportation, 2026), yielding a delivered-cost estimate used to bound the competitive pricing range for Ontario private landfills near the Michigan border.

Disposal facilities receiving Canadian waste were identified from the State of Michigan's report on solid waste landfilled (2024). Tipping fee data for these facilities were drawn from publicly reported sources (Grosse Pointe Times, 2022) (University of Michigan - Waste Management Services, 2025) (Kimball Township, 2023).

In New York State Niagara County, Modern Landfill was identified as a recipient of Canadian waste based on its annual report filed with the New York State Department of Environmental Conservation (Modern Landfill, Inc., 2025). The tipping fee for Modern Landfill was obtained from the facility's pricing under the New York State Office of General Services procurement contract for solid waste and recycling services (2026).

3.5 Data Collection

Data used for the development of this report was collected from both primary and secondary sources, as described in the following subsections.

3.5.1 Primary Data Collection

Primary data was collected through field reconnaissance, a structured interview program, and information obtained directly from Walker. Field reconnaissance was conducted to identify businesses within the study area. A structured interview program was carried out to gather information from businesses, real estate professionals, municipal finance officials, economic development agencies, business associations and chambers of commerce, labour

organisations, and tourism organisations. Introductory letters with a project description were hand-delivered by Avaanz to businesses and real estate brokerages selected for interview. Requests for interview were emailed to the other organisations. Three follow ups were made to each organisation contacted for interview. Interview request letters and accompanying project information booklet are provided in **Appendix B**, and the interview plan and guides is provided in **Appendix C**.

Walker Environmental Group provided data regarding data regarding current expenditures, suppliers, and South Landfill employee places of residence data.

3.5.1.1 Identification of Businesses in Study Area

Businesses within the LSA were identified through a combination of field reconnaissance and desktop review of aerial imagery and street-level photography from Google Maps and Google Street View and The Niagara Economic Development – Niagara Business Directory (2026b). Business names, addresses, type of business, and contact information were compiled from Google Maps business listings and the Niagara Business Directory. All collected information was entered into a business database (**Appendix A**).

3.5.1.2 Business Interviews

A total of 19 businesses (excluding real estate brokerages) within the study area were contacted for business interviews as part of the economic study. Sixteen of these businesses are located in the NNA, two within the broader LSA, and Jones Lang LaSalle property management for the Outlet Collection at Niagara just peripheral to the LSA. To encourage participation and as a first step, introduction letters and a project information booklet prepared by Walker were hand delivered to the businesses by Avaanz staff. Introductions and attempts to schedule interviews were made upon the initial visit where possible, otherwise phone and email contact information was obtained for follow up interview requests. In most instances three follow up requests were made for interview by both email and phone. Four operators participated in interviews representing five businesses. Additionally, an operator who declined invitation to undertake a full interview participated in answering key questions during the initial visit. Interviews covered business operations and outlook, the effects of Walker's presence on those operations, and the potential effects of the proposed Phase 2 project.

In addition to the businesses approached by Avaanz, three recreational businesses within the NNA (Regency Athletic Resort, Beechwood Golf & Social House, and Royal Niagara Golf Club) were approached for interview as part of the social impact assessment.

3.5.1.3 Real Estate Professionals Interviews

A total of six real estate brokerages as well as the Niagara Association of Realtors (NAR) were contacted for interview. Two interviews were completed. Interviews covered market conditions, pricing trends, and the potential effects of Walker's presence and the proposed Phase 2 project on the local real estate market.

3.5.1.4 Municipal Finance Interviews

Interviews were sought with senior finance staff in the four LSA municipalities and the Niagara Region. No interviews were completed. The absence of municipal finance interviews represents a data gap for the Public Finance evaluation criterion. To compensate, the assessment relies on secondary data from Financial Information Return (FIR) multi-year reports published by the Province of Ontario, which provide audited financial data for all five municipalities. While FIR data provide a comprehensive quantitative basis for assessing fiscal capacity and financial stability, they do not capture municipal staff perspectives on fiscal priorities, capital planning considerations, or the anticipated financial effects of the proposed undertaking. These qualitative dimensions remain a limitation of the analysis.

3.5.1.5 Economic Development Interviews

Five economic development agencies were contacted, one for each of the four LSA municipalities and one for the Niagara Region. Two participated in interviews. The interviews covered the state and outlook of the local economy, planned economic development initiatives, the effects of Walker's existing presence, and concerns or opportunities associated with the proposed Phase 2 project.

3.5.1.6 Business Associations / Chambers of Commerce Interviews

Six organisations representing business associations and chambers of commerce were contacted: the Greater Niagara Chamber of Commerce, the South Niagara Chamber of Commerce, the Niagara-on-the-Lake Tourism/Chamber of Commerce, the Niagara Board of Trade and Commerce, the Niagara Industrial Association, and the Niagara Home Builders Association. Five participated in interviews. Interviews covered the business climate, Walker's presence, and concerns or opportunities associated with the proposed Phase 2 project.

3.5.1.7 Labour Organisations Interviews

Two labour organisations were contacted, with one completing an interview. The interview covered the state of labour and employment in the region, Walker's existing presence, and the potential effects of the proposed Phase 2 project.

3.5.1.8 Tourism Organisations Interviews

Four tourism organisations were contacted: Niagara Falls Tourism, the Tourism Partnership of Niagara (TPN), the Niagara-on-the-Lake Tourism/Chamber of Commerce, and St. Catharines Tourism. Of these, one participated in an interview and a second provided written responses to interview questions. Interviews covered the state of the tourism sector and the potential effects of Walker's operations and the proposed Phase 2 project.

3.5.2 Secondary Data Collection

Secondary data were compiled from a variety of sources including Statistics Canada and Lightcast datasets, provincial ministries and regional economic development agencies, municipal financial

records and planning documents, real estate brokerage and association publications, central-bank and financial-institution analyses, waste-sector trade-association and consulting reports, and U.S. state and operator data used for cross-border benchmarking. These sources are organised according to the four evaluation criteria established in the approved ToR: local economy, property values, public finance, and cost of services.

3.5.2.1 Summary of Secondary Information Sources

Table 2 lists the secondary sources used in the development of this report, organised by ToR evaluation criterion and by the topic each source informs.

Table 2: Secondary Source Information

Topic	Data	Information Source
Local Economy	Labour Force Characteristics	<ul style="list-style-type: none"> Statistics Canada – Census Profiles Statistics Canada – Labour force characteristics by census metropolitan area, annual
	Occupations	<ul style="list-style-type: none"> Lightcast – Occupation Table
	Commuting Flows	<ul style="list-style-type: none"> Statistics Canada – Commuting Flow from Geography of Residence to Geography of Work
	Businesses	<ul style="list-style-type: none"> Lightcast – Industries by Business Location Size Niagara Economic Development – Quick Facts Niagara Economic Development – Niagara Business Directory Jones Lang LaSalle – Outlet Collection at Niagara
	Industry	<ul style="list-style-type: none"> Lightcast – Industry Table Lightcast – Regional Jobs, Wages, Sales
	Tourism	<ul style="list-style-type: none"> Lightcast – Industry Table Lightcast – Regional Jobs, Wages, Sales Niagara Economic Development – Tourism Report Ministry of Tourism, Culture and Sport – Regional Tourism Profile Tourism Partnership of Niagara – Strategic Plan Town of Niagara-on-the-Lake – Strategy and Action Plan St. Catharines Economic Development and Tourism – Strategy City of Thorold – Strategic Plan
	Farms	<ul style="list-style-type: none"> Lightcast – Industry Table Lightcast – Regional Jobs, Wages, Sales Statistics Canada – Land use, Census of Agriculture Niagara Economic Development – Niagara Agriculture Profiles
	GDP	<ul style="list-style-type: none"> Niagara Region – Economic Update
	Household Spending	<ul style="list-style-type: none"> Statistics Canada – Household Spending, Canada, Regions and Provinces
Property Values	Neighbourhood Profiles	<ul style="list-style-type: none"> Remax Hendriks Team Realty
	Property Sales	<ul style="list-style-type: none"> Teranet - Geowarehouse

Topic	Data	Information Source
	Sales, Average Sales Price, MLS® Home Price Index	<ul style="list-style-type: none"> McGarr Realty Corp. – Annual Market Reports Bosley Real Estate – Annual Market Reports CREA – MLS® Home Price Index (HPI) tool
	Interest Rates and Market Commentary	<ul style="list-style-type: none"> Bank of Canada – Canadian Interest Rates Niagara Association of Realtors – Media Release and Stats CMHC – Housing Market Outlook Reports Central 1 Credit Union – Economic Analysis of Ontario Reports CREA – Updates Resale Housing Market Forecasts RBC Economics – Canadian Analysis
Public Finance	Population, Households, Building Permits, Tax Base, Revenue, Financial Stability, Tangible Capital Assets, Environmental Services Costs	<ul style="list-style-type: none"> Ontario MMAH – Financial Information Returns
	Property Tax Rates	<ul style="list-style-type: none"> Niagara Region – Property Tax Policy, Ratios, and Rates City of Niagara Falls – Tax Rates
	Niagara waste management funding, cost recovery landfill liability	<ul style="list-style-type: none"> Niagara Region – Technical Memo, Financial Review Niagara Region – 2025 Waste Management Tipping Fees
	Wastewater rates	<ul style="list-style-type: none"> The Corporation of the Town of Niagara-on-the-Lake By Law NO. 2025-014
	Asset Management Plans	<ul style="list-style-type: none"> City of Niagara Falls – Asset Management Planning – Levels of Service Setting and Financial Plan City of St. Catharines – 2025 Asset Management Plan City of Thorold – Asset Management Plan 2025 Town of Niagara-on-the-Lake – Asset Management Plan Roads, Structures, Water and Waste Water Niagara Region – Corporate Asset Management Plan
Cost of Services	Ontario Waste Disposal	<ul style="list-style-type: none"> W2RO – 2025 State of Waste in Ontario: Landfill Report AMO – Ontario Baseline Waste & Recycling Report
	Niagara Landfills, Niagara Disposal	<ul style="list-style-type: none"> GHD – Current State Report: Waste Management Strategic Plan Walker Environmental Group – Proposed Terms of Reference: Walker South Landfill Phase 2 Environmental Assessment GHD – Business Case Analysis: Supporting Document #1 Walker South Landfill Phase 2
	U.S. Landfills Receiving Canadian Waste	<ul style="list-style-type: none"> State of Michigan, Department of Environment, Great Lakes, and Energy – Report of Solid Waste Landfilled in Michigan Modern Landfill, Inc. – Annual Report

Topic	Data	Information Source
	Gate rate disposal fees, bulk rate disposal fees, Transfer costs	<ul style="list-style-type: none"> Niagara Region – Landfills in Niagara webpage Niagara Region – 2025 Waste Management Tipping Fees Walker – Niagara Region: Waste Drop-Off Information Essex-Windsor Solid Waste Authority – Tipping Fees City of London – Waste Disposal Fees Grosse Pointe Times; University of Michigan; Kimball Township – Michigan Landfill Tipping Fees New York State Office of General Services – Solid Waste Recycling and Management Services Contract City of Toronto – Solid Waste Management Services Schedule of Fees
	Cross-Border Bridge Tolls	<ul style="list-style-type: none"> Michigan Department of Transportation – Blue Water Bridge Toll Schedule Federation Bridge Corporation – Tolls Niagara Falls Bridge Commission – Tolls
	Haulage Distances, driving times	<ul style="list-style-type: none"> Google Maps
	U.S. Canadian Exchange Rates	<ul style="list-style-type: none"> Bank of Canada

3.6 Data Limitations

Use of Proxy Data

Some indicators in this report use St. Catharines–Niagara Census Metropolitan Area (CMA) data rather than Niagara Region (RSA) data including labour force statistics, because Statistics Canada publishes CMA data on a more current basis; and GDP, because Statistics Canada does not publish a comparable Niagara Region series. The CMA includes all Niagara Region municipalities except Grimsby and West Lincoln, capturing the large majority of the region's population and economic activity. CMA figures therefore approximate RSA conditions reasonably well, though they do not reflect conditions in Grimsby or West Lincoln, which may differ from the CMA-wide pattern.

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 behaviour likely had a substantial impact on the participation and unemployment rates reported for 2021.

When analysing 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 recognise that labour market

disruptions varied by community and sector, with certain areas and industries such as tourism and hospitality being disproportionately affected.

CMA employment, unemployment, and participation between 2021 and 2025 confirm that the 2021 Census readings largely captured pandemic disruption rather than structural conditions. The 2021 figures should therefore be interpreted as a pandemic-era snapshot rather than a stable baseline.

Gross Domestic Product

GDP is not published at the municipal level. To estimate GDP for each LSA municipality, this report split the St. Catharines–Niagara CMA GDP figure (Niagara Economic Development, 2026a), according to each municipality's share of total industry wages derived from Lightcast (2025d) (2025c).

This approach has two limitations. Wages are only part of GDP. They don't include business profits or taxes paid by businesses, so municipalities with capital-intensive industries may have GDP shares that differ from their wage shares. The wage data is also annual while the CMA GDP data is quarterly, which adds uncertainty given that Niagara's tourism is highly seasonal. The municipal figures should therefore be treated as estimates. They are useful for comparing municipalities and identifying growth trends but are not precise individual measurements.

Distribution of Household Expenditures

The lowest level at which Statistics Canada publishes the distribution of household expenditures is the province. The Ontario profile is therefore applied as a proxy for household consumption patterns in the LSA and RSA, on the assumption that households in the study areas allocate consumption across categories in the same proportions as the average Ontario household. Sub-provincial spending patterns may differ from the Ontario average because of local differences in housing costs, demographics, income, and the urban-rural mix of the population.

Primary Data Collection Response Rates

The primary data collection program achieved variable response rates across stakeholder groups. Of 19 businesses contacted, five interviews were conducted representing six business. Of the six real estate brokerages contacted, one completed an interview in addition to group interview with members of Niagara Association of Realtors. No municipal finance interviews were completed despite requests to all five municipalities. The low overall response rate, and the complete absence of municipal finance participation, limits the qualitative depth of the assessment for certain evaluation criteria.

Proprietary Data Sources

Employment, occupation, industry, and business count data sourced from Lightcast are produced by applying proprietary modelling, including nowcasting, small-area estimation, and staffing-pattern matrices, to underlying Statistics Canada inputs such as the Labour Force Survey, the Census, the Survey of Employment, Payrolls and Hours, the Canadian Business Counts, and the Business Register. While Lightcast's outputs generally reconcile with Statistics Canada aggregates

at higher geographies and broader classifications, the proprietary algorithms used to disaggregate and nowcast those inputs are not fully disclosed and cannot be independently replicated. Divergence from Statistics Canada benchmarks is more likely at fine geographies (for example, census subdivision level) and within narrow North American Industry Classification System (NAICS) or National Occupational Classification (NOC) codes. Readers should interpret Lightcast-sourced figures with this in mind.

Cost of Services

For IC&I generators, which account for the majority of waste disposed at the South Landfill, disposal is priced through individually negotiated bulk contracts between private operators and their customers. These rates are confidential and are not publicly available. To estimate private-sector bulk IC&I rates, this assessment uses a delivered-cost approach based on posted tipping fees at Michigan landfills that receive Canadian waste, combined with round-trip haulage costs and Blue Water Bridge tolls. This approach reflects the competitive dynamic in which Ontario operators near the Michigan border price to retain volumes against the cross-border alternative. The resulting estimates are corroborated by published volume-tiered rate schedules at public-sector facilities that accept commercial waste, specifically the Essex-Windsor Solid Waste Authority and the City of London, which converge near the estimated range.

4. Characterisation of the Existing Environment

This section characterises the existing environment within the Local and Regional Study Areas. It first describes the LSA setting and then characterises existing conditions under each of the four evaluation criteria established in the approved ToR: Local Economy, Property Values, Public Finance, and Cost of Services.

4.1 Local Study Area

4.1.1 Land Uses

The existing land uses in the LSA are documented in the Land Use Existing Conditions Report (MHBC, 2026). The SSA is located outside of the Settlement Area and Urban Area Boundaries, within the Rural Area as defined in the Niagara Region Official Plan (NROP) (MHBC, 2026). The area surrounding the SSA is predominantly agricultural in character, with field crops interspersed with rural residential properties (MHBC, 2026). The area also contains industrial development associated with the adjacent Walker Resource Management Campus, which includes landfill, aggregate processing, composting, and biosolids management operations, as well as industrial development to the southwest toward Beaverdams Road and to the west along the Welland Canal corridor. Natural heritage features including the Niagara Escarpment are located to the north (MHBC, 2026).

Within 1 km of the Walker Resource Management Campus boundary, the Agricultural Existing Conditions Report identifies eleven agricultural operations: three north of the Campus (one remnant farm, one equestrian operation, and one nursery), one east (a remnant farm), and seven south (three retired livestock operations, two hobby farms, one nursery, and one apiary), with no agricultural operations identified west (Colville Consulting Inc., 2026). One additional agriculture-related use, a winery, is identified north of the Campus. Excluding the Walker Resource Management Campus parcels, the 1 km Local Study Area contains 135 parcels with an average size of 8.55 hectares, of which 61 are 2 hectares or smaller, with the agricultural land base fragmented through the development of non-agricultural uses, primarily rural residential (Colville Consulting Inc., 2026). Agricultural uses within the 1 km zone comprise predominantly cash crop farming with no active livestock operations identified, alongside one agri-commercial use (a garden centre and plant nursery (Gauld Nurseries Ltd.) at the northeast corner of Garner Road and Mountain Road) (MHBC, 2026). Under the NROP, the majority of the 1 km zone is designated Prime Agricultural Area, with the northern portion within the Niagara Escarpment Plan Area classified as Specialty Crop Area (MHBC, 2026).

Northwest of the SSA, below the Niagara Escarpment, commercial, institutional, and residential development occurs within the Glendale Secondary Plan Area (Town of Niagara-on-the-Lake), including the Outlet Collection at Niagara, White Oaks Conference Resort and Spa, and Niagara College. The nearest Urban Residential designation within the Glendale Secondary Plan is situated approximately 2.02 km from the SSA, separated by a rail corridor (MHBC, 2026).

To the west, the Welland Canal separates the LSA from the urban areas of St. Catharines and Thorold. The City of St. Catharines Urban Area Boundary encompasses the General Motors Propulsion Plant and the residential and commercial area west of the canal. The City of Thorold's Urban Area Boundary encompasses industrial and residential properties west of the canal, as well as the area of South Thorold located southwest of the SSA. The 2 km LSA radius from the Walker Resource Management Campus encompasses a fraction of this Urban Area.

To the east of the SSA, the existing Urban Area Boundary of the City of Niagara Falls extends to Kalar Road. The Northwest Secondary Plan Area, located east of Kalar Road and south of Mountain Road, was brought into the City's Urban Area Boundary as a Designated Greenfield Area through the 2022 NROP and is currently in Phase 1 of its planning process (MHBC, 2026).

4.1.2 Walker Resource Management Campus

The Walker Resource Management Campus is located at 2800 Thorold Townline Road in the City of Niagara Falls. The Campus encompasses waste management, resource recovery, aggregate processing, and renewable energy operations (Walker, 2024a). Facilities on the Campus include the South Landfill (Phase 1), the East Landfill, Walker Brothers Quarry, the Niagara Compost Facility, the Niagara Biosolids Facility, the Walker Resource Recovery Area, the Residential Waste and Recycling Drop-Off, the Niagara Renewable Natural Gas (RNG) Facility and associated landfill gas control and utilisation facilities, an aggregate processing area with stockpile areas and an asphalt plant, and Walker Head Offices.

The South Landfill has operated since 2009 under Environmental Compliance Approval (ECA) No. 0084-78RKAM, with a total approved capacity of 17.7 million m³. The landfill accepts solid, non-hazardous waste from residential and industrial, commercial, and institutional (IC&I) sources, with a service area comprising the Province of Ontario. The South Landfill is anticipated to reach 99 percent of approved capacity by July 1, 2030 (WSP Canada, 2026). The Southeast Quarry, which constitutes the SSA, is an active aggregate extraction operation located east of the South Landfill under Licence 11175, comprising 76.12 ha. A second quarry licence exists within the Campus (Licence 4437), which includes the aggregate processing facilities. Aggregate operations on the Campus date back to 1887. Aggregate materials are excavated, stockpiled, processed, and hauled to local asphalt, concrete, and road construction markets (MHBC, 2026).

In addition to the South Landfill and Southeast Quarry, the Campus accommodates a cluster of non-landfill resource recovery operations developed in conjunction with the Region of Niagara's waste management program. Organics are handled at the Niagara Compost Facility, developed on the footprint of the former West Landfill (WSP Canada, 2026) and processing approximately 55,000 tonnes of food waste and organic material annually (Walker, 2024a), and at the Niagara Biosolids Facility, which treats biosolids received from municipalities across Canada (WSP Canada, 2026) (Walker, 2024a). The Walker Resource Recovery Area recovers wood waste, railway ties, asphalt shingles, and clean soils, while the Residential Waste and Recycling Drop-Off serves residents of St. Catharines, Niagara Falls, and Niagara-on-the-Lake (Walker, 2024a). The compost facility, biosolids facility, and residential drop-off are operated in partnership with the Region of Niagara (Walker, 2024a). The Niagara Renewable Natural Gas Facility, together with the

associated landfill gas control and utilisation infrastructure, operates as a joint venture between Walker Industries, Enbridge Gas Inc., and Comcor Environmental Limited (Walker, 2023).

The Campus is screened from adjacent road frontages by landscaped berms and perimeter vegetation, and a large portion of Campus lands to the west, toward Thorold Townline Road, is under rehabilitation to agricultural use (MHBC, 2026). Walker owns approximately 428.6 ha within the 1-km radius of the SSA, representing about 64.3 percent of that area (MHBC, 2026). Most of these holdings lie outside the Campus footprint and consist of undeveloped agricultural land that functions as a buffer to Campus operations (WSP Canada, 2026).

4.1.3 Residences

4.1.3.1 Near-Neighbour Area

Within 500m of the proposed landfill expansion site there are five properties with existing residences. North of the site there is one residence located within 500m and the Gauld Nurseries property which includes a residence is intersected by the 500m isoline. East of the site along Garner Road, one residence is located within 500m and two properties with residences are bisected by the 500m isoline.

In the zone between 500m and 1000m of the proposed site, there are another 30 properties with existing homes (excluding those counted bisecting the previous zone). Within this zone, east-southeast of the site along Garner Rd. there are 22 residences within the 500m-1000m zone, and 2 residences are located on properties bisected by the 1000m isoline. South of the site along Thorold Stone Rd, there are another 3 residences within the 1000m isoline, and another single residence within 1000m on Walker owned lands southwest of the site off Taylor Rd. North of the site, there is one residence within 1000m along Garner Rd.

In the zone between 1000m and 2000m of the proposed site, there are 308 residential dwellings on properties within or bisected by the isoline (excluding those counted bisecting the previous zone). This total includes seventy dwellings in Pine Tree Village northeast of the site and 18 dwellings in Shady Oaks Mobile Park to the east of the site.

Dwellings are generally spread out with dense concentration found at the intersection of Garner Road and Thorold Stone Road southeast of the site (17 residences), and within the urban boundary of Niagara Falls east/southeast of the site (142 residences).

4.1.4 Study Area Businesses

4.1.4.1 Near-Neighbour Area

The following businesses and facilities were identified within the NNA. They are described by geographic location relative to the proposed Phase 2 site, proceeding clockwise from the northwest.

Northwest of the site is the General Motors (GM) St. Catharines Propulsion Plant, which manufactures engines and transmissions and is one of the largest employers in Niagara Region,

with approximately 600 workers (Motor Illustrated, 2024). The plant also houses SpencerARL, a third-party logistics contractor under the Spencer Butcher Group (Unifor, 2024) (Spencer Butcher Group, n.d.). Also northwest of the site is the Royal Niagara Golf Club, a 27-hole public course operated by Kaneff Golf, occupying approximately 45 hectares (110 acres) and employing about 50 grounds and club staff; the course operates April through November and serves roughly 30,000 golfers per year (SLR Consulting (Canada) Ltd., 2026a).

Northeast of the site along Garner Road is Gauld Nurseries, a garden centre and nursery, and further north along Warner Road, south of the QEW, is Perridiso Estate Winery.

East of the site, in the vicinity of Kalar Road and Mountain Road, are two large recreational and event venues. The Regency Athletic Resort on Mountain Road is a complex with outdoor sports fields, a restaurant and bar, an off-track betting area, event facilities, and 18 on-site guest rooms (SLR Consulting (Canada) Ltd., 2026a) (Regency Athletic Resort, 2026). Club Italia on Montrose Road is a non-profit cultural and social centre with approximately 400 members, operating as a banquet and conference facility with event space for up to 600 guests, alongside extensive outdoor recreation amenities (SLR Consulting (Canada) Ltd., 2026a) (Club Italia, 2026).

Southeast of the site, at the intersection of Kalar Road and Thorold Stone Road, are a Circle K gas station and convenience store and two food service establishments: Pete's Pizza and Green Island Restaurant. There is also a landscaping business just south of the intersection on Kalar Road, Skelding G Landscaping.

The southwest quadrant contains the highest concentration of commercial and industrial activity. Along Old Thorold Stone Road are SilverLine Group Inc., a construction and residential development firm; a service yard for Element Landscape Services Inc.; and Niagara Ready Mix, a ready-mix concrete supplier.

At the intersection of Thorold Stone Road and Thorold Townline Road are a Petro-Canada gas station and convenience store, a Tim Hortons, and Broad Street Cheesesteaks (a food truck at the southwest corner).

Southwest of the site are Boondocks Pet Resort, a pet boarding and daycare facility on Thorold Stone Road; Rankin Construction – Thorold Asphalt, a hot-mix asphalt manufacturing operation on Thorold Townline Road; Beechwood Golf & Social House, a semi-private 18-hole course with approximately 300 members and an on-site banquet facility (SLR Consulting (Canada) Ltd., 2026a), also on Thorold Townline Road; and Thorold Automotive Solutions, an auto parts and vehicle recycling business on Beaverdams Road.

West of Thorold Townline Road are three Niagara Region public facilities: the Niagara Region Thorold Patrol Yard, a Public Works service centre at 3557 Thorold Townline Road; and two Niagara Regional Police Service fleet and supply centres at 3547 and 3551 Thorold Townline Road.

In addition to the businesses listed above, desktop review using Google Maps identified four home-based businesses within the NNA with no posted external signage. These include Great Lakes Contractors, an excavating contractor at Warner and Garner Road; Impression Recording Studio, a

recording in Mount Carmel neighbourhood; Mitchell Contracting, a general contractor on Garner Road; and Rancho Hermoza Tree Service & Lot Clearing, a tree service operator near the intersection of Garner and Thorold Stone Road.

In total, 24 businesses (excluding Walker), one non-profit cultural and social club (Club Italia), and three Niagara Region public facilities were identified within the NNA.

The prevalence of home-based commercial activity in the NNA was further characterised through the SLR Site Neighbour Survey. The SLR Site Neighbour Survey received responses from 38 property owners across the NNA. Of these, eight, identified eight properties (21% of respondents) operating a home-based business, a commercial farming operation, or both: three home-based businesses, three commercial farms (including at least two wheat-growing operations), and two properties operating both (SLR Consulting (Canada) Ltd., 2026b).

4.1.4.2 Broader Local Study Area

Beyond the NNA within the boundaries of the LSA, businesses are located predominately in three primary areas: the industrial corridor east of the Welland Canal along Old Thorold Stone Road, Beaverdams Road, and Niagara Falls Road; the Thorold Multimodal Hub at 3363 Davis Road; and the mixed-commercial area west of the Welland Canal in Downtown Thorold and Merritton St. Catharines. Two additional businesses were identified north of the SSA: one in Niagara-on-the-Lake and one in St. Catharines.

East of the canal southwest of the SSA, seven businesses were identified along Old Thorold Stone Road, Seaway Haulage Road, Beaverdams Road, and Niagara Falls Road including a construction equipment supplier, transportation services operator, steel fabricator, truck repair shop, machine shop, industrial and marine power systems supplier, and a siding contractor.

The Thorold Multimodal Hub, located southwest of the site on the east side of the Welland Canal at 3363 Davis Road, is a site owned by Bioveld Canada Inc. (a subsidiary of The BMI Group) and operated in partnership with HOPA Ports (the Hamilton-Oshawa Port Authority). The Hub hosts approximately 20 operating businesses within the LSA, including Bioveld and HOPA Ports themselves, comprising heavy manufacturers, specialty energy and utilities operators, wholesale and warehousing operators, and engineering and port services firms.

West of the Welland Canal, approximately 180 businesses are located in Downtown Thorold and Merritton St. Catharines, comprising independent retail; restaurants and cafés; pharmacies, medical, and dental practices; banks and credit unions; legal and accounting professionals; a supermarket and convenience stores; personal services (hair, beauty, fitness); inns; and a smaller cluster of industrial and trades operators along Ormond Street South and Industrial Drive.

North of the SSA, two businesses were identified within the LSA: the White Oaks Conference Resort and Spa, a hotel and conference facility on Taylor Road in Niagara-on-the-Lake offering 220 guest rooms, with the resort serving approximately 400,000 visits per year and employing around 620 full-time and part-time staff; and a retailer of flower pots and wood-plastic flooring on Glendale Avenue in St. Catharines.

In total, approximately 209 businesses were identified within the LSA outside the NNA: 180 west of the Welland Canal within Downtown Thorold and Merritton; 20 tenants at the Thorold Multimodal Hub on Davis Road; seven businesses along the industrial corridor east of the canal; and two businesses north of the SSA, the White Oaks Conference Resort and Spa on Taylor Road in Niagara-on-the-Lake, and a flower pot and flooring retailer on Glendale Avenue in St. Catharines.

Desktop review using Google Maps identified an additional 20 home-based businesses operating from residential properties within the LSA beyond the NNA. Thirteen are located west of the Welland Canal in Downtown Thorold: trades and contractors (masonry, electrical, plumbing, handyman); personal services (hair removal, pet grooming, car detailing); creative and craft operations (recording studio, dice and mould making, sewing studio, bakery); one travel agency; and one bed and breakfast. The remaining seven are located east of the Welland Canal: six in the Niagara-on-the-Green subdivision in Niagara-on-the-Lake (northwest of the site), comprising a software company, truck repair, health consultant, wedding bakery, hair extension service, and air duct cleaning service; and one home-based apartment rental agency south of the site.

Including these home-based operations, approximately 229 businesses were identified within the LSA outside the NNA.

4.1.4.3 Outlet Collection at Niagara

The Outlet Collection at Niagara, located at 300 Taylor Road in Niagara-on-the-Lake northwest of the site, falls just outside the 2 km LSA boundary. It is noted here because of its scale within the regional economy. As of 2026, the centre includes approximately 109 retail tenants offering apparel; footwear, handbags, and luggage; sportswear and equipment; jewellery and accessories; health and beauty; home goods; and food services including a food court. It receives approximately 5.5 million annual shopper visits and was ranked among Niagara Region's largest private employers in 2022, with approximately 1,450 employees (Jones Lang LaSalle, 2024) (Niagara Economic Development, 2024b).

4.1.5 Business Climate

This section characterises the business climate in which LSA enterprises operate, drawing on interviews with operators and on independently confirmed establishment dates. Operators identified location as a primary advantage of operating in the area, citing convenient highway access, central positioning within the Niagara Region, and zoning appropriate to their operations. Current challenges cited by operators included difficulty recruiting qualified tradespeople, the housing market downturn affecting construction-related activity, and capacity constraints. Several respondents described current investment and expansion plans, including infrastructure and operational improvements, expanded facilities, additional development on or adjacent to existing properties, and the addition of leasable building space. An interview documented in the Social Existing Conditions report also indicated that the Royal Niagara Golf Club is exploring year-round operation through the rental or purchase of golf simulators for installation in a new building on-site (SLR, 2026). These responses characterise a business community engaged in active reinvestment.

The tenure of businesses within the NNA reinforces this Characterisation. Nine near-neighbour businesses were already operating at the same location at the time of the Phase 1 EA in 2005, and several have substantially longer histories. Gauld Nurseries, Rankin Construction, General Motors St. Catharines Propulsion Plant, and Beechwood Golf & Social House all reported tenure exceeding twenty years to the May 2005 Phase 1 EA survey, placing their establishment prior to 1985. Boondocks Pet Resort reported tenure of 11-20 years, placing its establishment between 1985 and 1994, and Royal Niagara Golf Club was established in the early 2000s (Gartner Lee Limited, 2006). These long-tenured businesses have operated continuously alongside the Walker Resource Management Campus, which has provided waste disposal services for approximately 40 years and has been an active industrial site since the 1880s.

Other long-tenured operators include Thorold Automotive Solutions (founded 1982) and the Regency Athletic Resort (at its Mountain Road location since the 1960s). Since Walker's South Landfill commenced operations in 2009, at least six additional businesses spanning retail, food service, construction, and industrial sectors have opened within the NNA: a Petro-Canada and Tim Hortons development (2015), Circle K (late 2015 to early 2016), SilverLine Group Inc. (approximately 2021), Niagara Ready Mix (August 2024), and Broad Street Cheesesteaks and Pete's Pizza (fall 2025). The continued operation of long-tenured near-neighbour businesses, together with new establishments choosing to locate in the area during Phase 1 operations, indicates landfill proximity has not been a barrier to commercial activity in the NNA.

Beyond the NNA tourism related businesses within the broader LSA White Oaks Conference Resort and Spa and Inn at Lock Seven have also operated alongside Walker Resource Management Campus for considerable duration. The Inn at Lock Seven was built in 1965 at 24 Chapel Street South in Thorold (Inn at Lock 7, 2026). The White Oaks Conference Resort and Spa was established in 1978 as a fitness club and was expanded into the current resort form between 1980 and 1985. White Oaks Conference Resort and Spa also has plans for significant development having received approval for a mixed-use residential development on the property comprising 810 dwelling units in four high-rise towers, together with ground-floor retail and commercial space along Taylor Road (Town of Niagara-on-the-Lake, 2024)

The SLR Site Neighbour Survey corroborates this long-tenure pattern; of the 8 respondents reported operating a home-based business or commercial farming operation at their property, half of those eight reported tenure of more than twenty years at that location (SLR Consulting (Canada) Ltd., 2026b).

4.1.6 Common Receptor Locations

For the purposes of the Environmental Assessment, eighteen common receptor locations were identified within the study area (CR01, CR04 through CR08, and CR10 through CR21). Fifteen of the eighteen receptors lie within the 2 km NNA. CR07 sits at 2,005 m southeast of the site, just beyond the near-neighbour boundary at Kalar Road and Thorold Stone Road. The remaining two receptors are in the broader LSA: CR06 at 2,577 m west, representing the eastern edge of Thorold's urban boundary; and CR16 at 2,893 m northwest in St. Catharines. Receptors generally

represent areas of residential development or identified recreational or institutional features. Refer to **Figure 2** for the locations of common receptors.

Figure 2: Common Receptor Locations

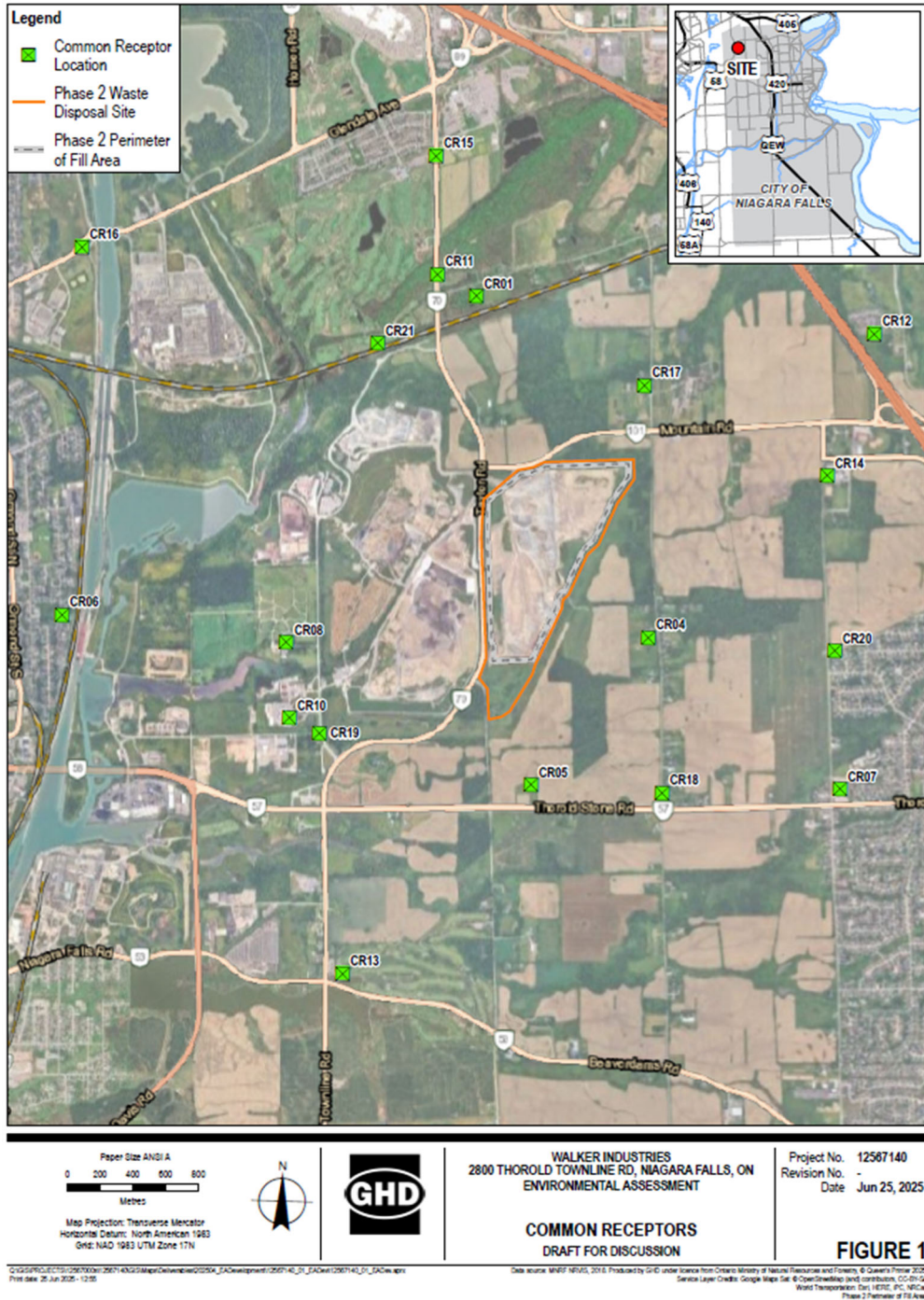


Table 3 lists the business properties (excluding at-home businesses) identified within proximity of each receptor location.

Table 3: Common Receptors Description and Businesses Within Proximity

Receptor ID	Receptor Name	Receptor Description	Number of Businesses and Business Names within Proximity
CR01	Residences on Warner Road and the Niagara Escarpment	Located approximately 1,094m from the proposed Waste Disposal Site Boundary Limits. Serves as representative of residences on Warner Road and the Niagara Escarpment.	No businesses identified
CR04	Nearest residences on Garner Rd	Located approximately 550m from the proposed Waste Disposal Site Boundary Limits. Serves as representative of the residences on Garner Rd south of Mountain Rd and north of the transmission line that crosses Garner Rd north of Thorold Stone Rd.	No businesses identified
CR05	Nearest residence, South	Located approximately 450m from the proposed Waste Disposal Site Boundary Limits.	1 business: <ul style="list-style-type: none"> Boondocks Pet Resort
CR06	Nearest residences West and City of Thorold urban boundary	Located approximately 2,577m from the proposed Waste Disposal Site Boundary Limits. Located at the eastern edge of the urban boundary for the City of Thorold, it serves as representative of a wide variety of residential, institutional, recreational and commercial developments within the City.	1 business within close proximity of receptor: <ul style="list-style-type: none"> The Inn at Lock Seven <p>Dozens of businesses within proximity (properties \leq ~500m) concentrated in commercial core area of Front St. N, Clairmont St. and Albert St.</p>
CR07	Nearest school: St. Vincent De Paul Catholic Elementary School	Located approximately 2,005m southeast from the proposed Waste Disposal Site Boundary Limits. Serves as representative of an important public facility, a cluster of residences backing onto Kalar Road at Thorold Stone Road, commercial businesses at the corner of Kalar Road and Thorold Stone Road and the Shriner's Woodlot Park off Kalar Road.	4 businesses: <ul style="list-style-type: none"> Circle K Pete's Pizza Green Island Skelding G Landscaping

Receptor ID	Receptor Name	Receptor Description	Number of Businesses and Business Names within Proximity
CR08	Lakeview Cemetery	Located approximately 1,197m west from the proposed Waste Disposal Site Boundary Limits. Serves to represent an important public institutional feature along Thorold Townline Road, used for outdoor public ceremonies and informal recreational activities.	No businesses identified. 1 institution: <ul style="list-style-type: none"> • Lakeview Cemetery
CR10	Niagara Thorold Patrol Yard / Niagara Regional Police Fleet Centre	Located approximately 1,186m west from the proposed Waste Disposal Site Boundary Limits. Serves as representative of two public institutional facilities with outdoor components and industrial/commercial operations along Old Thorold Stone Road to the west and southwest.	2 businesses: <ul style="list-style-type: none"> • SilverLine Group Inc. • Element Landscape Services Inc. (works yard)
CR11	Woodend Conservation Area	Located approximately 1,295m north from the proposed Waste Disposal Site Boundary Limits. Serves as representative of the outdoor recreational uses at the Bruce Trail along the Niagara Escarpment, Walker's Living Campus and Royal Niagara Golf Club. Serves as a location along Taylor Road, often used for biking and country drives.	1 business: <ul style="list-style-type: none"> • Royal Niagara Golf Club
CR12	Pine Tree Village Mobile Home Park	Located approximately 1,655m northeast from the proposed Waste Disposal Site Boundary Limits. Serves as representative of a cluster of residences east of the Queen Elizabeth Way. Can also be considered a control site that is not likely to have noticeable noise, dust, traffic or visual effects from the landfill.	No businesses identified.
CR13	Beechwood Golf & Social House	Located approximately 1,787m south from the proposed Waste Disposal Site Boundary Limits. Serves as representative of the outdoor recreational uses at the Beechwood Golf Course and along Beaver Dams Road.	3 businesses within proximity (properties \leq ~500m): <ul style="list-style-type: none"> • Beechwood Golf & Social House • Thorold Automotive Solutions • Rankin Asphalt

Receptor ID	Receptor Name	Receptor Description	Number of Businesses and Business Names within Proximity
CR14	Northwest Secondary Plan Area	Located approximately 1,181m east from the proposed Waste Disposal Site Boundary Limits. Serves as representative of an area proposed for future residential development and the western edge of the City of Niagara Falls urban area boundary.	1 business: <ul style="list-style-type: none"> Regency Athletic Resort 1 non-profit: <ul style="list-style-type: none"> Club Italia
CR15	Niagara-on-the-Green Subdivision / Glendale Secondary Plan Area	Located approximately 1,984m north from the proposed Waste Disposal Site Boundary Limits. Serves as representative of the southern edge of the Glendale Secondary Plan Area proposed for future residential development and the Niagara-on-the Lake urban area boundary. Additionally representative of the Royal Niagara Golf Club and Niagara College.	2 businesses: <ul style="list-style-type: none"> Royal Niagara Golf Club White Oaks Conference Resort and Spa (property $\leq \sim 500\text{m}$) 1 institution <ul style="list-style-type: none"> Niagara College
CR16	St. Catharines	Located approximately 2,893m northwest from the proposed Waste Disposal Site Boundary Limits. Representative of nearest area within the City of St. Catharines municipal boundary at the corner of Glendale Road and the Welland Canal Parkway and recreational trail.	4 businesses within proximity (properties $\leq \sim 500\text{m}$) of receptor within LSA: <ul style="list-style-type: none"> General Motors St. Catharines Propulsion Plant SpencerARL (within GM Plant) Glendale Metal Company YOUME International Inc. 1 non-profit organisation: <ul style="list-style-type: none"> St Lawrence Seaway Management Corporation
CR17	Nearest residence Northeast and Gauld Nurseries	Located approximately 456m from the proposed Waste Disposal Site Boundary Limits. Representative of the nearest residence northeast of the Waste Disposal Site Boundary Limits, and Gauld Nurseries, an important local business.	1 business: <ul style="list-style-type: none"> Gauld Nurseries Ltd
CR18	Residences at South end of Garner Road	Located approximately 1054m from the proposed Waste Disposal Site Boundary Limits. Serves as representative of the cluster of residences on Garner Rd south of the transmission line and north of Thorold Stone Rd.	No businesses identified.

Receptor ID	Receptor Name	Receptor Description	Number of Businesses and Business Names within Proximity
CR19	Nearest Residence Southwest	Located approximately 1033m from the proposed Waste Disposal Site Boundary Limits. This is a Walker-owned property that is currently tenanted.	4 businesses within proximity (properties \leq ~500m): <ul style="list-style-type: none"> • SilverLine Group Inc. • Element Landscape Services Inc. (works yard) • Petro-Canada • Tim Hortons • Broadstreet Cheesesteaks
CR20	Residences east of Kalar Road	Located approximately 1585m from the proposed Waste Disposal Site Boundary Limits. Representative of subdivision east of Kalar Road.	No businesses identified.
CR21	Royal Niagara Golf Club	Located approximately 1146m from the proposed Waste Disposal Site Boundary Limits.	1 business: <ul style="list-style-type: none"> • Royal Niagara Golf Club

Two businesses within the NNA are not directly represented by any of the above receptors. These are listed below.

1. Perridiso Estate Winery (Warner Road, south of QEW), about a 1,000m distance from the closest common receptors CR17 and CR12.
2. Niagara Ready Mix (Old Thorold Stone Road), property is nearly 600m from the closest receptor CR10.

Common receptors associated with the delineated neighbourhood units used for property value analysis are as follows:

- Niagara-on-the-Green: CR15
- Rural Residential: CR01, CR04, CR05, CR11, CR12, CR13, CR14, CR17, CR18, CR19
- Mount Carmel: CR20, CR07
- Downtown Thorold & Merritton St. Catharines: CR06

No common receptors fall within Thorold South. CR16, located in the City of St. Catharines at the corner of Glendale Avenue and the Welland Canal Parkway, sits in the industrial area and is a considerable distance from the residential portion of Merritton.

4.1.7 Existing Nuisance Conditions

Existing nuisance conditions within the LSA have been characterised by the air quality, noise, visual character, and transportation consultants for the Walker South Landfill Phase 2 Environmental Assessment: RWDI AIR Inc. for air quality and noise, GHD for visual character, and TYLin for transportation. The discussion below summarises findings from those consultants as they bear on

the economic assessment, with particular focus on nuisance conditions that may affect businesses and residents.

4.1.7.1 Nuisance Values

Baseline nuisance values at the common receptor locations are recorded for the scenario in which the South Landfill Phase 1 and the quarry are operating together and the South Landfill Phase 2 is not in place. The values for dust, total odours, impulsive noise, continuous noise, and traffic (reported as Walker site-generated trips on the road segment most relevant to each receptor) are summarised in **Table 4**. Visibility is characterised separately in the Visual sub-section below.

Table 4: Baseline Nuisance Values at Common Receptor Locations – South Landfill Phase 1 and the Quarry are Operating Together

CR ID	Receptor Name / Location	Distance	TSP / Dust (Max 24-hr $\mu\text{g}/\text{m}^3$; MECP AAQC: 120) days >120 $\mu\text{g}/\text{m}^3$ over 5 yrs	Total Odours (Max 10-min OU; freq >1 / >3 / >5 OU)	Impulsive Noise (dBAI) Banger / Cracker / Shotgun	Continuous Noise (dBA) Day / Night	AM Peak Walker Heavy-Vehicle Trips (count; % of peak-hour traffic)	PM Peak Walker Heavy-Vehicle Trips (count; % of peak-hour traffic)
CR01	Residences on Warner Road and the Niagara Escarpment	>1000m	94.8; 0 days	Max 10-min OU: 3.8 Freq >1 OU: 1.1% \approx 96-hrs/yr Freq >3 OU: 0.1% \approx 9-hrs/yr	62 / 50 / 67	49 / 38	42 (7.9%)	26 (3.8%)
CR04	Nearest residences on Garner Rd	500-1000m	73.4; 0 days	Max 10-min OU: 2.7 Freq >1 OU: 1.3% \approx 114-hrs/yr	58 / 55 / 70	48 / 36	2 (1.9%)	1 (1.0%)
CR05	Nearest residence, South	<500m	80.8; 0 days	Max 10-min OU: 4.0 Freq >1 OU: 1.2% \approx 105-hrs/yr Freq >3 OU: 0.2% \approx 18-hrs/yr	62 / 54 / 71	45 / 39	43 (2.7%)	27 (1.4%)
CR06	Nearest residences West and City of Thorold urban boundary	>1000m	89.1; 0 days	Max 10-min OU: 2.5 Freq >1 OU: 0.9% \approx 79-hrs/yr	56 / 47 / 62	41 / 32	N/A	N/A
CR07	Nearest school: St. Vincent De Paul Catholic Elementary School	>1000m	62.0; 0 days	Max 10-min OU: 1.6 Freq >1 OU: 0.4% \approx 35-hrs/yr	54 / 46 / 61	37 / 26	45 (2.8%)	27 (1.4%)
CR08	Lakeview Cemetery	>1000m	155.9; 1 days	Max 10-min OU: 5.7 Freq >1 OU: 4.7% \approx 412-hrs/yr Freq >3 OU: 1.0% \approx 88-hrs/yr Freq >5 OU: 0.1% \approx 9-hrs/yr	63 / 48 / 70	49 / 45	7 (10.0%)	6 (6.3%)
CR10	Niagara Thorold Patrol Yard / Niagara Regional Police Fleet Centre	>1000m	108.9; 0 days	Max 10-min OU: 6.3 Freq >1 OU: 2.7% \approx 237-hrs/yr Freq >3 OU: 0.6% \approx 53-hrs/yr Freq >5 OU: 0.1% \approx 9-hrs/yr	63 / 55 / 71	50 / 48	10 (9.1%)	8 (6.6%)
CR11	Woodend Conservation Area	>1000m	92.2; 0 days	Max 10-min OU: 4.1 Freq >1 OU: 1.1% \approx 96-hrs/yr Freq >3 OU: 0.1% \approx 9-hrs/yr	60 / 46 / 66	49 / 37	42 (7.9%)	26 (3.8%)
CR12	Pine Tree Village Mobile Home Park	>1000m	72.4; 0 days	Max 10-min OU: 1.5 Freq >1 OU: 0.3% \approx 26-hrs/yr	53 / 46 / 59	36 / 25	N/A	N/A
CR13	Beechwood Golf & Social House	>1000m	69.0; 0 days	Max 10-min OU: 3.2 Freq >1 OU: 0.3% \approx 26-hrs/yr	55 / 47 / 61	38 / 31	10 (3.4%)	8 (2.0%)
CR14	Northwest Secondary Plan Area	>1000m	70.2; 0 days	Max 10-min OU: 1.8 Freq >1 OU: 0.4% \approx 35-hrs/yr	56 / 49 / 63	40 / 30	21 (4.9%)	16 (3.5%)
CR15	Niagara-on-the-Green Subdivision / Glendale Secondary Plan Area	>1000m	71.5; 0 days	Max 10-min OU: 3.0 Freq >1 OU: 0.5% \approx 44-hrs/yr	56 / 41 / 61	43 / 31	N/A	N/A
CR16	St Catharines	>1000m	65.9; 0 days	Max 10-min OU: 2.1 Freq >1 OU: 0.4% \approx 35-hrs/yr	53 / 45 / 59	40 / 29	N/A	N/A

CR ID	Receptor Name / Location	Distance	TSP / Dust (Max 24-hr $\mu\text{g}/\text{m}^3$; MECP AAQC: 120) days $>120 \mu\text{g}/\text{m}^3$ over 5 yrs	Total Odours (Max 10-min OU; freq $>1 / >3 / >5$ OU)	Impulsive Noise (dBAI) Banger / Cracker / Shotgun	Continuous Noise (dBA) Day / Night	AM Peak Walker Heavy-Vehicle Trips (count; % of peak-hour traffic)	PM Peak Walker Heavy-Vehicle Trips (count; % of peak-hour traffic)
CR17	Nearest residence Northeast and Gauld Nurseries	<500m	88.0; 0 days	Max 10-min OU: 2.5 Freq >1 OU: 0.9% \approx 79-hrs/yr	61 / 54 / 67	45 / 34	0 (0.0%)	1 (11.1%)
CR18	Residences at South end of Garner Road	>1000m	66.7; 0 days	Max 10-min OU: 2.3 Freq >1 OU: 0.6% \approx 53-hrs/yr	59 / 51 / 66	42 / 32	2 (1.9%)	1 (1.0%)
CR19	Nearest Residence Southwest	>1000m	122.5; 1 days	Max 10-min OU: 6.8 Freq >1 OU: 2.8% \approx 245-hrs/yr Freq >3 OU: 0.7% \approx 61-hrs/yr Freq >5 OU: 0.2% \approx 18-hrs/yr	63 / 56 / 68	47 / 44	10 (9.1%)	8 (6.6%)
CR20	Residences east of Kalar Road	>1000m	67.2; 0 days	Max 10-min OU: 1.7 Freq >1 OU: 0.4% \approx 35-hrs/yr	56 / 48 / 63	40 / 29	N/A	N/A
CR21	Royal Niagara Golf Club	>1000m	155.0; 6 days	Max 10-min OU: 4.8 Freq >1 OU: 1.8% \approx 158-hrs/yr Freq >3 OU: 0.4% \approx 35-hrs/yr	49 / 40 / 64	58 / 36	N/A	N/A

Source: (RWDI AIR Inc., 2026a) (RWDI AIR Inc., 2026b) (TYLin, 2026a)

Note: For total odours, any of the >1 , >3 or >5 OU frequency thresholds not listed for a receptor is zero (no predicted exceedance).

Dust

Three receptors record dust values above the Ontario Ministry of the Environment, Conservation and Parks (MECP) 24-hour Ambient Air Quality Criterion of $120 \mu\text{g}/\text{m}^3$ for total suspended particulate (Ministry of the Environment, Conservation and Parks, 2020):

- CR08 (Lakeview Cemetery): $156 \mu\text{g}/\text{m}^3$; exceeded on one day over the five-year modelling period
- CR21 (Royal Niagara Golf Club): $155 \mu\text{g}/\text{m}^3$; exceeded on six days over the five-year modelling period
- CR19 (Nearest Residence Southwest): $123 \mu\text{g}/\text{m}^3$; exceeded on one day over the five-year modelling period

Across the five-year modelling period these exceedances are infrequent, and the remaining fifteen receptors record no exceedance on any modelled day.

Odour

Odour is reported as the maximum 10-minute concentration and the frequency of excursions above the 1, 3 and 5 OU thresholds, where 1 OU is the average detection threshold (at which odour is first detectable but not necessarily a nuisance), 3 OU the recognition threshold, and 5 OU the annoyance threshold; the 3 to 5 OU range is that the Air Quality assessment associates with potential complaints.

For total odours, the highest values are at the following:

- CR19 (Nearest Residence Southwest): 6.8 OU; >3 OU 0.7% \approx 61 hrs/yr, >5 OU 0.2% \approx 18 hrs/yr
- CR10 (Niagara/Thorold Patrol Yard and Niagara Regional Police Fleet Centre): 6.3 OU; >3 OU 0.6% \approx 53 hrs/yr, >5 OU 0.1% \approx 9 hrs/yr
- CR08 (Lakeview Cemetery): 5.7 OU; >3 OU 1.0% \approx 88 hrs/yr, >5 OU 0.1% \approx 9 hrs/yr
- CR21 (Royal Niagara Golf Club): 4.8 OU; >3 OU 0.4% \approx 35 hrs/yr
- CR11 (Woodend Conservation Area): 4.1 OU; >3 OU 0.1% \approx 9 hrs/yr
- CR05 (Nearest Residence South): 4.0 OU; >3 OU 0.2% \approx 18 hrs/yr
- CR01 (Residences on Warner Road and the Niagara Escarpment): 3.8 OU; >3 OU 0.1% \approx 9 hrs/yr
- CR13 (Beechwood Golf & Social House): 3.2 OU

The remaining ten receptors record values at or below 3 OU.

Noise

Impulsive noise refers to short-duration, high-intensity noise events and is measured in dBAI. The common receptor data records contributions from three on-site pest-control sources: banger, cracker, and shotgun. The three values for each receptor are reported in that order.

The receptors recording the highest impulsive noise values are:

- CR05 (Nearest Residence South): 62 / 54 / 71
- CR10 (Niagara/Thorold Patrol Yard and Niagara Regional Police Fleet Centre): 63 / 55 / 71
- CR04 (Nearest residences on Garner Road): 58 / 55 / 70
- CR08 (Lakeview Cemetery): 63 / 48 / 70

The remaining fourteen receptors record maximum source values ranging from 68 dBAI at CR19 (Nearest Residence Southwest) down to 59 dBAI at CR12 (Pine Tree Village Mobile Home Park) and CR16 (St Catharines).

Continuous noise refers to sustained background noise levels and is measured in dBA, reported separately for daytime and night-time periods. This is distinct from the short impulsive events described above. The highest daytime value is recorded at CR21 (Royal Niagara Golf Club, 58 dBA day / 36 dBA night). The receptors with the highest values across both day and night are:

- CR10 (Niagara/Thorold Patrol Yard and Niagara Regional Police Fleet Centre): 50 / 48 dBA
- CR08 (Lakeview Cemetery): 49 / 45 dBA
- CR19 (Nearest Residence Southwest): 47 / 44 dBA

Traffic

Walker site-generated trips at each common receptor are reported as AM and PM peak hour volumes on the road segment most relevant to that receptor, modelled at the 2028 reference year under the baseline scenario (South Landfill Phase 1 and Quarry operating together, no South Landfill Phase 2). All counted vehicles are heavy trucks. Twelve receptors have a relevant road segment with reported volumes; six receptors (CR06, CR12, CR15, CR16, CR20, CR21) are not adjacent to a road segment relevant to Walker operations and are recorded as not applicable.

The highest Walker site-generated trip volumes are concentrated on the Thorold Stone Road and Taylor Road corridors closest to the active operations: CR07 (St. Vincent De Paul Catholic Elementary School, Thorold Stone Road east of Garner) at 45 AM / 27 PM; CR05 (Nearest Residence South, Thorold Stone Road between Garner and Taylor) at 43 AM / 27 PM; CR01 and CR11 (both on Taylor Road north of the primary quarry access intersection) each at 42 AM / 26 PM. Mountain Road east of the Garner Road intersection (CR14) records 21 AM / 16 PM.

The Thorold Townline corridor receptors record 10 AM / 8 PM at CR10, CR13, and CR19, and 7 AM / 6 PM at CR08. Garner Road receptors record the lowest volumes: 2 AM / 1 PM at CR04 and CR18, and 0 AM / 1 PM at CR17.

Visual

The visual baseline records the most prominent visible features at each common receptor. The quarry is fully obscured at all eighteen common receptors. Walker components appear in the baseline landscape at six: the Garner Road berm is the most prominent feature at CR04 (Nearest residences on Garner Road); portions of the South Landfill Phase 1 mound are visible in the distance, partially obscured, at CR05 (Nearest Residence South), CR08 (Lakeview Cemetery) and CR10 (Niagara/Thorold Patrol Yard and Police Fleet Centre); and vegetated Walker berms are the recorded features at CR19 (Nearest Residence Southwest) and CR21 (Royal Niagara Golf Club). At the remaining twelve receptors the most prominent visible features are non-Walker landscape elements such as vegetation, agriculture and commercial and industrial operations (GHD, 2026).

4.1.8 Walker Complaint Record

The Walker complaint record characterises the nuisances reported by nearby residents and businesses over the 2022 to 2025 period. The RWDI Air Quality Existing Conditions report (2026a) categorises these complaints by emission source and type, and its complaint log records the date, location, wind conditions and suspected source of each complaint.

Odour accounts for almost the entire complaint record, with 113 complaints logged over the 2022 to 2025 period. By comparison, dust drew a single complaint, and landfill gas, combustion by-products, and blowing litter none. The log also records three quarry blasting complaints relating to vibration and pressure, and two road-watering entries for dust control. Odour is therefore the only air quality nuisance of sustained concern to the community, and the near-absence of dust, landfill gas, and combustion by-product complaints is consistent with effective control of these sources at nearby properties (RWDI AIR Inc., 2026a).

Odour complaints fell from 2022 to 2024 before rising again in 2025 (41, 31, 15 and 26 respectively), with the 2025 increase driven by the composting operations rather than the landfill. Composting was the largest single source of complaints over the period, with the remainder split between landfill operations and complaints that could not be traced to a specific operation (RWDI AIR Inc., 2026a). RWDI attributes the higher 2022 and 2023 volumes to gas collection wells installed while the renewable natural gas facility was being built, which let landfill gas escape; the fall after that work finished in 2024 suggests current odour controls are working (RWDI AIR Inc., 2026a).

Odour complaints are concentrated in the two residential areas that account for most of the record, the City of Thorold and the Niagara-on-the-Green subdivision in Niagara-on-the-Lake, in broadly similar numbers. The lead shifts between them over the period, with Niagara-on-the-Green highest in 2023 and 2024 and Thorold highest in 2025. Niagara Falls accounts for a smaller share, and St. Catharines and the White Oaks Conference Resort and Spa for only isolated complaints, the latter three over the period, one each in 2022, 2023 and 2024 (RWDI AIR Inc., 2026a). This pattern matches the prevailing southwest, south and east winds described in Walker's Best Management Practices Plan (BMPP) for Odour Mitigation (June 2024), which identifies Niagara-on-

the-Green and Thorold as the most exposed residential areas (RWDI AIR Inc., 2026a, citing Walker BMPP June 2024).

4.1.9 Interview Responses Regarding Nuisance Effects

The characterisation of existing nuisance effects draws on three streams of interview input: Avaanz interviews with operators of businesses in the LSA; Avaanz interviews with regional organisations including chambers of commerce, business and industry associations, an economic development office, and a tourism organisation; and an SLR interview with the Royal Niagara Golf Club documented in the Social Existing Conditions report.

Across the business interviews, odour was a nuisance raised by operators. Three themes emerged from their accounts: perceptibility varies with wind direction and weather conditions, frequency differs by location, and no operator reported that odour had resulted in a loss of business, although one operator noted occasional past concerns regarding potential impact on outdoor activities. Two operators reported occasional exposure with no impact on operations. Another characterised the smell as perceptible on arrival at the business but not "once you're inside the building," with intensity varying by wind direction; this operator indicated "nobody's had any issues with it" and described the odour as "not even that big of a deal." One operator described odour as occurring every one to two weeks depending on weather and wind conditions, although acknowledged that conditions had been more serious four to five years ago.

Noise from the landfill was not raised by any of the business operators; one operator specifically indicated they do not hear a lot of noise from the landfill. With regards to other nuisances, one respondent noted that roads in proximity of the site can become muddy from truck activity but acknowledged that Walker does a good job of cleanup, and that this does not affect their business. No respondent raised dust, litter, traffic, or visual intrusion as a nuisance.

Across the six regional organisations interviewed (chambers of commerce, business and industrial associations, an economic development office, and a tourism organisation), nuisance effects from Walker's existing operations did not surface as an issue raised by members or stakeholders. Two interviewees offered first-hand observations rather than member reports. A tourism-sector representative acknowledged perceptible odour at home on warm summer days while in the same exchange describing Walker as having "done an excellent job of maintaining as many boundaries as possible, keeping noise to a minimum." An economic development representative said "we don't often run into smell issues," indicating occasional but infrequent nuisance. The remaining four interviewees identified no Walker-specific nuisance concerns from their constituencies, and a second tourism organisation confirmed in written responses that Walker "does not currently track as a priority advocacy item or concern for our stakeholders." On this evidence, nuisance effects from Walker's current operations have not aggregated into a sectoral or association-level concern at the regional scale; the two direct experiential references describe odour as occasional rather than persistent, and the more detailed of the two also acknowledges Walker's noise-management performance.

An interview with the Royal Niagara Golf Club, documented in the Social Existing Conditions report, indicated that golfers have noticed odours from the Walker Campus on occasion, perhaps four or five times a year, with no other nuisance categories raised (SLR Consulting (Canada) Ltd., 2026a). Across the business operators interviewed for this assessment no nuisance category other than odour has been raised as a meaningful concern.

4.1.9.1 Effect of Existing Walker Resource Management Campus on Study Area Residences

Findings from the SLR Site Neighbour Survey indicate that Walker's existing operations have affected some residents' use and enjoyment of their properties. The survey was delivered in 2025 to approximately 260 residences nearest the Walker Campus and asked about property use, satisfaction, and migration intent. Of the 38 property owners who responded (28 in Niagara Falls, 10 in Niagara-on-the-Lake), 22 (58%) reported that the presence and activities of the Walker Resource Management Campus have affected their use and enjoyment of their residential property. Of these 22, 21 (95%) said they keep their windows closed or avoid outdoor activities because of odour from the site. Three had made property modifications to mitigate noise or dust, three reported increased noise from trucks, and two avoided certain roads near the site. Because the question allowed respondents to identify more than one effect, the counts add to more than 22 (SLR Consulting (Canada) Ltd., 2026a).

Nineteen of 38 respondents (50%) had considered moving in the past five years. Of the 18 who gave a reason, 14 cited landfill proximity (smell or odour), 5 cited traffic, and 3 cited housing or lifestyle preferences. Sixteen explained why they stayed; the most common reasons were the surrounding green space and neighbourhood character (10), attachment to the property (5), and the quiet of the area (3) (SLR Consulting (Canada) Ltd., 2026a).

4.2 Local Economy

This section establishes the baseline economic conditions in the LSA and RSA. The data describe the labour force, occupational structure, commuting patterns, business base, and industry composition (including tourism and farm sectors), documenting the economic conditions that predate the proposed undertaking.

4.2.1 Labour Force Characteristics

Labour-force size, participation rates, and employment status set the supply of workers available across the LSA and RSA. These characteristics determine how much of the project's direct, indirect, and induced employment can be filled from the local workforce.

Table 5 presents 2021 labour force characteristics for residents of the LSA and RSA. Unemployment rates were elevated across all four LSA communities at the time of the Census, ranging from 15.0% in Niagara-on-the-Lake to 22.5% in Niagara Falls. Niagara Falls, the host municipality, had the highest unemployment rate, while the remaining communities exhibited rates in the 15.0% to 15.8% range. Participation rates varied across the LSA communities, with Niagara Falls and St. Catharines at approximately 58%, Thorold somewhat higher at 61.8%, and Niagara-

on-the-Lake notably lower at 50.7%. Labour force structure thus varies across LSA communities, so the local workforce available to the project differs by community within the study area.

Table 5: 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%
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: (Statistics Canada, 2023a), (Avaanz Ltd., 2026).

Between 2016 and 2021, employment in the LSA declined by 9.1%, with most communities experiencing contraction. The decline varied by municipality. Niagara Falls experienced the steepest decrease at 14.2%, while Thorold was the only LSA community to record employment growth (9.9%) over this period.

Both the 2021 Census and the change from 2016 to 2021 reflect labour market conditions during the COVID-19 pandemic. Labour Force Survey data for the St. Catharines–Niagara CMA provide more recent context for how the regional labour market has evolved since 2021 (Statistics Canada, 2026a). CMA employment recovered from 203,000 in 2021 to 228,400 by 2022 and reached 239,300 by 2025, while unemployment declined from 10.4% in 2021 to 5.2% in 2022 before settling at 6.9% in 2025. Participation rates have remained broadly stable at approximately 60-62% over this period. These trends indicate that the elevated unemployment rates observed in the 2021 Census were largely attributable to pandemic conditions rather than structural labour market weakness, and that the regional labour market has stabilized since 2021.

As shown in **Table 5**, RSA participation rates were close to those of the LSA (58.5% and 58.2%), while RSA unemployment was lower (15.5% versus 18.1%). The LSA comprised approximately 57.6% of the RSA's working-age population. This consistency, combined with the CMA's post-pandemic recovery, indicates that the labour market conditions observed in the communities surrounding the Walker Campus are representative of the Niagara Region. By 2025, the labour market relevant to the project's construction and operational workforce had recovered from the pandemic-era conditions visible in the 2021 Census and was operating closer to normal capacity.

4.2.2 Occupations

The occupational data presented describe the structure of the LSA labour market, the types of jobs it supports, the wages associated with them, and whether the local workforce can supply the

labour the project would require during construction and operation. In 2024, the LSA supported approximately 137,890 jobs across all occupational categories. While total LSA employment declined over the 2018–2024 period, the pattern of change varied across occupational categories, with contraction concentrated in some lower-wage categories and growth in higher-skilled, higher-wage categories and in trades, transport and equipment operators and related occupations, a mid-wage category most directly relevant to the project's labour requirements.

Table 6 presents the distribution of jobs by 1-digit National Occupational Classification¹ (NOC) within the LSA and RSA for 2024. The occupational mix is weighted toward service and trades-oriented categories, which together account for nearly half of all LSA employment. St. Catharines and Niagara Falls account for over 80% of total LSA jobs, and the distribution of occupational categories is broadly consistent across the larger communities, with Thorold somewhat more concentrated in trades, transport and equipment operators and related occupations. The project's employment effects would draw from a labour market with a similar occupational structure across the study area.

Table 6: LSA Jobs by Occupation, 1-Digit NOC, 2024

Occupation	Niagara Falls	Niagara-on-the-Lake	St. Catharines	Thorold	LSA	RSA
1 Business, finance and administration occupations	6,560	2,280	10,840	1,930	21,610	35,670
2 Natural and applied sciences and related occupations	3,010	930	4,680	880	9,490	15,700
3 Health occupations	3,150	680	6,790	780	11,410	17,740
4 Occupations in education, law and social, community and government services	4,780	1,310	9,670	1,560	17,320	29,050
5 Occupations in art, culture, recreation and sport	1,130	540	1,890	230	3,780	6,330
6 Sales and service occupations	14,220	4,510	19,960	2,290	40,970	64,850
7 Trades, transport and equipment operators and related occupations	7,430	2,030	10,590	2,270	22,320	38,810
8 Natural resources, agriculture and related production occupations	580	770	1,070	130	2,550	6,410

¹ 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

Occupation	Niagara Falls	Niagara-on-the-Lake	St. Catharines	Thorold	LSA	RSA
9 Occupations in manufacturing and utilities	1,860	590	3,110	500	6,050	11,490
X Unclassified occupation	600	190	1,080	160	2,020	3,390
0 Legislative and senior management occupations	120	40	180	40	370	600
Total Occupations	43,430	13,850	69,840	10,770	137,890	230,030

Source: (Lightcast, 2025a), (Avaanz Ltd., 2026).

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

Table 7 presents occupational employment change and average wages for the LSA and RSA between 2018 and 2024. Total employment in the LSA declined by 3.8% over this period, while the RSA grew by 3.3%, indicating divergent patterns between the local and regional labour markets. Within the LSA, the pattern of change was not uniform. Lower-wage categories such as sales and service (-20.7%) and natural resources, agriculture and related production occupations (-18.3%) experienced significant contraction, while higher-wage professional and technical categories grew. Manufacturing and utilities (NOC 9), at a mid-range wage, also contracted by 13.7%. Legislative and senior management occupations (NOC 0) declined sharply (-30.2%), though the category remains small (approximately 370 jobs in the LSA in 2024). The project's core labour demand, primarily trades, transport and equipment operators (NOC 7), falls within a category that grew by 3.5% in the LSA over this period, suggesting that the local labour market has continued to support employment in the occupational category most directly relevant to landfill construction and operations. Where the project draws on other categories, the regional market provides additional supply.

Table 7: Jobs Growth and Average Wages by Occupation, 1-Digit NOC, 2018-2024

Occupation	LSA % Change	RSA % Change	2024 Average Wages
1 Business, finance and administration occupations	10.1%	18.3%	\$74,600
2 Natural and applied sciences and related occupations	31.3%	41.1%	\$99,100
3 Health occupations	-0.4%	2.7%	\$74,900
4 Occupations in education, law and social, community and government services	19.8%	25.4%	\$86,400
5 Occupations in art, culture, recreation and sport	-14.5%	-4.8%	\$56,900
6 Sales and service occupations	-20.7%	-12.7%	\$51,100
7 Trades, transport and equipment operators and related occupations	3.5%	6.4%	\$67,400

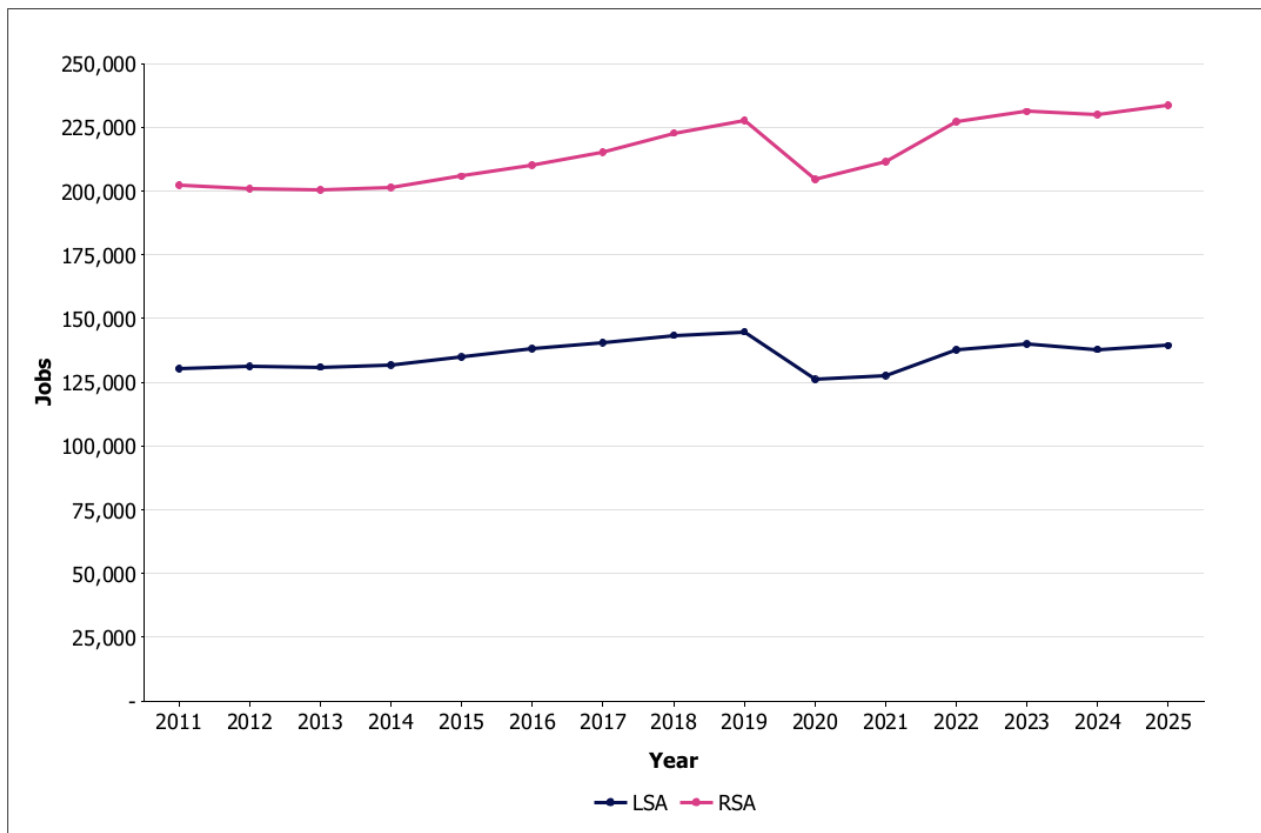
Occupation	LSA % Change	RSA % Change	2024 Average Wages
8 Natural resources, agriculture and related production occupations	-18.3%	-7.6%	\$53,500
9 Occupations in manufacturing and utilities	-13.7%	-6.3%	\$68,800
X Unclassified occupation	-13.3%	-5.0%	
0 Legislative and senior management occupations	-30.2%	-25.0%	\$210,200
Total Occupations	-3.8%	3.3%	

Source: (Lightcast, 2025a), (Avaanz Ltd., 2026)

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

Figure 3 shows total jobs in the LSA and RSA from 2011 to 2024. The LSA's net employment decline over the period coincided with strong pre-pandemic growth and a partial post-pandemic recovery; the RSA recovered more fully. By 2024, the LSA labour market had stabilised following the pandemic-era disruption.

Figure 3: LSA and RSA Total Jobs, 2011-2024



Source: (Lightcast, 2025a), (Avaanz Ltd., 2026)

Interviews conducted with labour, business, economic development, and tourism organisations across the LSA and RSA provided a qualitative complement to the quantitative occupational data. The current state of construction labour was characterised as exceptionally tight, with activity described as near-unprecedented and project demand expected to sustain high labour requirements for several years. Two major investment projects, the South Niagara Hospital in Niagara Falls and the Asahi Kasei battery separator plant in Port Colborne, were identified as primary drivers of current and anticipated demand. These projects, combined with ongoing residential and infrastructure construction, have created sustained pressure on the available skilled trades workforce.

Workforce availability was the most frequently cited challenge among interviewees. Organisations reported difficulty finding talent across specific professions and industries, identifying shortages in skilled trades, manufacturing, and tourism. Tourism representatives reported that operators in their sector face similar workforce challenges, including difficulty finding workers who are both qualified and willing to take available positions. A skills mismatch was noted, with youth unemployment remaining elevated even as employers reported difficulty finding workers with the qualifications they require. The need to increase the regional workforce was identified as a priority.

Interviewees identified structural barriers compounding these shortages. Housing affordability was the most widely cited, with organisations across multiple sectors reporting that rising housing costs limit the ability to attract and retain workers. Transportation constraints were also identified, particularly the difficulty of connecting workers in outlying communities to employment centres. One interviewee noted that childcare availability for employees' children has become an additional barrier that employers are now expected to help address. In Niagara-on-the-Lake, a demographic pattern was described in which the community has a senior and wealthy population with much of its workforce commuting in from outside the municipality rather than residing locally. These labour supply constraints were reported across multiple organisations representing different sectors.

The occupational baseline is one of structural shift whereby the LSA's labour market is growing in higher-skilled, higher-wage categories while contracting in some lower-wage categories, though the project's core labour demand in trades and transport falls within a category that has grown locally. Interviewees nonetheless reported difficulty sourcing workers in skilled trades and manufacturing, and the regional labour market was described as similarly tight, with workforce availability identified as a region-wide challenge.

4.2.3 Commuting Flow from Geography of Residence to Geography of Work

Commuting flow data describe the geographic relationship between residence and workplace for the LSA and RSA workforce, establishing the boundaries of the labour market the project would draw from. This determines whether the project's employment effects would be captured within the local economy or extend beyond the study area, a distinction that bears directly on the ToR criterion of retention of economic benefits within the local economy.

Table 8 presents commuting flows for employed individuals aged 15 and over across the LSA and the RSA, organised by geography of workplace and geography of residence. At the aggregate

level, the LSA functions as a substantially self-contained labour market on the demand side, with 78.5% of all LSA-located employment is held by LSA residents and 96.1% by workers living somewhere in the broader RSA, with fewer than one in twenty positions drawn from outside the region. Within the LSA, this pattern is consistent across St. Catharines, Niagara Falls, and Niagara-on-the-Lake, each of which sources around four in five of its workforce from LSA residents; Thorold sits noticeably lower, where local employers recruit only 67.4% of their workers from inside the LSA and bring in the balance from elsewhere in the RSA or beyond. Beyond the LSA, similar anchoring appears from the demand side: only 19.7% of jobs based in the RSA-excluding-LSA are taken by LSA residents, while 90.9% are filled by workers living within the RSA. Across the RSA as a whole, 94.1% of regional employment is held by RSA residents, and LSA residents alone account for 56.3% of all jobs across the region, indicating the LSA's role as the dominant labour supplier to the broader regional economy. For the assessment, this means that workers at the project, and at any suppliers located within the study area, would predominantly be drawn from the local workforce. Their wages, and the induced consumer spending those wages generate, would be captured by LSA and RSA households and the commercial base that serves them rather than dispersing beyond the RSA.

Table 8: LSA and RSA Commuting Flow of Employed Individuals Aged 15+, 2021

Area	Total Place of Work	Place of Residence			
		In LSA		In RSA	
	#	#	%	#	%
Niagara Falls	22,425	17,885	79.8%	21,795	97.2%
Niagara-on-the-Lake	6,635	5,440	82.0%	6,390	96.3%
St. Catharines	38,130	29,960	78.6%	36,425	95.5%
Thorold	4,985	3,360	67.4%	4,780	95.9%
LSA	72,175	56,645	78.5%	69,390	96.1%
RSA Excluding LSA	43,795	8,620	19.7%	39,790	90.9%
RSA	115,970	65,265	56.3%	109,180	94.1%

Source: (Statistics Canada, 2022a), (Avaanz Ltd., 2026)

The LSA functions as a largely self-contained labour market with strong commuter ties to the rest of the RSA. The project's workforce, and the wages spent locally, would therefore stay predominantly within the study area.

4.2.4 Businesses

The data presented below quantify the scale of the business base across the LSA and RSA, establishing the commercial environment into which the project's direct, indirect and induced economic activity would flow.

Table 9 presents the distribution of businesses by community within the LSA, with LSA and RSA summary totals, as of June 2025. The LSA contained 31,665 businesses (approximately 60% of the RSA's 52,406 total), with St. Catharines and Niagara Falls together accounting for the large majority. The business base with employees is dominated by small enterprises employing fewer than 10 workers (70.7% in the LSA and 72.8% in the RSA), though the LSA also anchors regional economic activity, with 17 of the top 20 private employers in the RSA within the LSA (Niagara Economic Development, 2024b). This concentration of businesses and major employers establishes the commercial base through which the project's indirect and induced economic effects would circulate.

Table 9: LSA and RSA Total Business Counts by Community, June 2025

Community	With Employees	Without Employees	Total
Niagara Falls	2,764	7,797	10,561
Niagara-on-the-Lake	1,048	2,685	3,733
St. Catharines	4,072	10,208	14,280
Thorold	702	2,389	3,091
LSA	8,586	23,079	31,665
RSA	14,527	37,879	52,406

Source: (Lightcast, 2025b), (Avaanz Ltd., 2026)

4.2.5 Industry

The industry data presented below describe the sectoral composition of the LSA and RSA economies.

Table 10 presents job growth by industry at the 2-digit NAICS level for the LSA and RSA from 2018 to 2024, along with average wages. The LSA experienced a net employment decline of 3.8% over this period, whereas the RSA grew by 3.3%. The pattern of change was uneven across industries. The steepest LSA declines occurred in arts, entertainment and recreation (-43.8%) and accommodation and food services (-32.0%), while a range of industries grew, including construction (8.1%), transportation and warehousing (16.5%), professional, scientific and technical services (14.7%), health care and social assistance (11.7%), and educational services (11.7%). The LSA's aggregate decline is driven primarily by sharp contraction in a few large employment sectors, particularly accommodation and food services and arts, entertainment and recreation, offsetting growth across a broader range of industries.

Table 10: Jobs and Average Wages by Industry, 2-Digit NAICS, 2018-2024

NAICS	2024 Jobs LSA	2024 Jobs RSA	LSA % Change (2018-2024)	RSA % Change (2018-2024)	Average Wages
11 Agriculture, forestry, fishing and hunting	1,610	5,040	-19.9%	-8.2%	\$36,900
21 Mining, quarrying, and oil and gas extraction	90	310	-25.0%	-8.8%	\$88,200
22 Utilities	1,000	1,340	6.4%	-0.7%	\$101,500
23 Construction	9,850	17,640	8.1%	10.3%	\$67,900
31-33 Manufacturing	9,280	18,960	-2.9%	6.6%	\$64,500
41 Wholesale trade	5,630	9,600	5.4%	6.9%	\$68,200

NAICS	2024 Jobs LSA	2024 Jobs RSA	LSA % Change (2018-2024)	RSA % Change (2018-2024)	Average Wages
44-45 Retail trade	17,640	27,240	-6.0%	-1.4%	\$33,100
48-49 Transportation and warehousing	5,920	9,640	16.5%	13.8%	\$57,100
51 Information and cultural industries	1,330	2,090	1.5%	13.0%	\$66,900
52 Finance and insurance	4,410	8,100	11.4%	30.4%	\$65,300
53 Real estate and rental and leasing	2,990	4,420	25.6%	26.3%	\$48,500
54 Professional, scientific and technical services	8,830	14,300	14.7%	23.7%	\$73,200
55 Management of companies and enterprises	350	620	66.7%	67.6%	\$76,600
56 Administrative and support, waste management and remediation services	7,300	11,810	-9.8%	-6.9%	\$52,200
61 Educational services	9,540	16,670	11.7%	16.1%	\$67,200
62 Health care and social assistance	19,730	31,060	11.7%	15.8%	\$53,900
71 Arts, entertainment and recreation	3,410	5,460	-43.8%	-31.2%	\$35,800
72 Accommodation and food services	14,080	21,380	-32.0%	-20.3%	\$24,700
81 Other services (except public administration)	4,910	8,540	-14.5%	-9.5%	\$49,200
91 Public administration	7,970	12,430	2.2%	7.8%	\$78,900
X0 Unclassified	2,020	3,390	-13.3%	-5.0%	\$67,300
Total Industry	137,890	230,030	-3.8%	3.3%	\$54,000

Source: (Lightcast, 2025c), (Avaanz Ltd., 2026)

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

Capital and operating expenditures related to the landfill are concentrated primarily in construction, professional, scientific and technical services, transportation and warehousing, manufacturing, and mining and quarrying. The largest of these grew strongly in both the LSA and RSA between 2018 and 2024: construction (8.1% LSA, 10.3% RSA), professional, scientific and technical services (14.7% LSA, 23.7% RSA), and transportation and warehousing (16.5% LSA, 13.8% RSA), indicating an active local supplier base. Mining and quarrying contracted (-25.0% LSA, -8.8% RSA), pointing to a tighter aggregate supply environment.

Table 11 presents total industry sales by LSA community for 2023, with the RSA total as the reference denominator. The LSA generated \$31.1 billion in total sales, representing 57.4% of the RSA's \$54.2 billion, a share consistent with the LSA's proportion of regional employment. The LSA's concentration of regional economic activity establishes the commercial environment through which the project's direct, indirect, and induced effects would circulate.

Table 11: Total Industry Sales by LSA Community with RSA Comparison, 2023

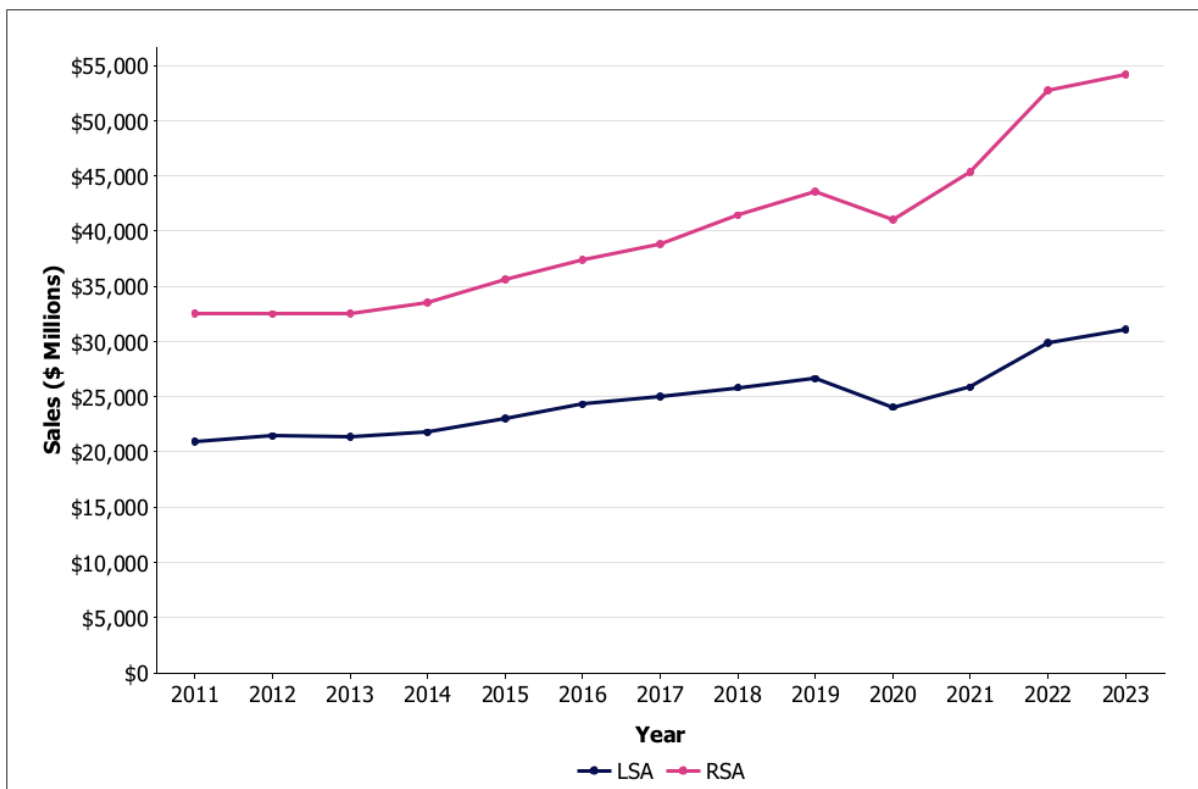
Community	Sales	Distribution
Niagara Falls	\$9,676,299,000	17.9%
Niagara-on-the-Lake	\$2,986,818,000	5.5%
St. Catharines	\$16,005,053,000	29.5%
Thorold	\$2,411,860,000	4.5%
Total LSA	\$31,080,029,000	57.4%
RSA	\$54,184,136,000	100.0%

Source: (Lightcast, 2025d), (Avaanz Ltd., 2026)

Note: Sales for the total LSA may not equal the sum of sales for individual communities due to rounding. Distribution is calculated as a share of RSA total sales.

Figure 4 illustrates total industry sales for the LSA and RSA from 2011 to 2023. The LSA’s sales growth lagged the RSA in each phase, with slower pre-pandemic growth, a sharper 2020 decline, and a weaker recovery. These trends preceded the project and describe a local economy where aggregate output has recovered but the underlying sectoral shifts documented above were already underway.

Figure 4: LSA and RSA Total Industry Sales, 2011-2023



Source: (Lightcast, 2025c), (Avaanz Ltd., 2026)

Business associations and chambers of commerce gave broadly similar accounts of current conditions: stable but pressured by trade uncertainty with the United States, which receives over 80% of Niagara's manufacturing exports. Through mid-2024 the region had seen an active investment period, with frequent announcements of major corporate investment and manufacturing expansion. That momentum has since stalled, with some organisations reporting that planning, expansion, and hiring had paused while businesses wait for clarity on trade conditions. Other factors cited included staffing pressures, supply chain constraints, the cost of goods, and regulatory complexity.

Beyond trade uncertainty, interviewees identified structural cost pressures as a persistent challenge. Organisations reported that the cost of doing business had risen significantly citing high taxes, development charges, and operating costs that are difficult to absorb into business models, compounded by ongoing supply chain pressures. Housing affordability was also identified as a concern affecting workforce attraction and retention.

Sector-specific observations from the interviews align with the statistical employment patterns presented above. The regional manufacturing base, which experienced significant contraction through the 1990s and early 2000s, was described as having spent the last two decades rebuilding, with municipal and regional investment beginning to pay off in recent years. Growth was reported in aerospace, marine industries, heavy and light industry, agri-food and agri-tech, advanced manufacturing and robotics, and the wine industry. The Asahi Kasei battery separator plant in Port Colborne was identified as one of the largest industrial investments in the region in recent years, with construction underway. More broadly, Niagara was described as an increasingly attractive destination for business investment, with available land, proximity to the U.S. border, and population growth drawing interest from firms looking beyond the built-out areas of the Greater Toronto and Hamilton region. However, interviewees also noted that the manufacturing sector remains sensitive to trade policy and regulatory conditions, and that the next one to three years may see consolidation among smaller, family-owned operations as ageing owners weigh exit against continued investment in an uncertain environment.

Both the LSA and RSA have diversified economic bases, with employment contraction concentrated in tourism-related sectors. This contraction pre-dates the proposed undertaking. Higher-wage professional industries grew, and total industry sales recovered beyond pre-pandemic levels. The RSA performed more resiliently than the LSA across most indicators, including net job growth, stronger sales recovery, and broader-based growth across industries. These sectoral conditions describe the local and regional industries that would supply the project's construction and waste-management employment and that would receive its supply-chain spending.

4.2.6 South Landfill

The South Landfill (Phase 1) currently employs 16 full-time Walker staff in operational, supervisory, and management roles. The workforce includes equipment operators, scale house and inspection staff, site supervision, and grounds maintenance staff.

Table 12 presents Walker South Landfill employees by place of residence. All 16 landfill employees reside within the Niagara Region, with the largest shares in St. Catharines (31 percent) and Niagara Falls (25 percent).

Table 12: Walker South Landfill Employment Distribution by Place of Residence

Place of Residence	Number of Employees (FTE)	% of Total
St. Catharines	5	31%
Thorold	2	13%
Niagara-on-the-Lake	1	6%
Niagara Falls	4	25%
Other Niagara Region Areas	4	25%
Total	16	100%

Source: (Walker Industries Ltd., 2026a), (Avaanz Ltd., 2026).

Table 13 presents the top ten suppliers to the South Landfill by expenditure, excluding internal transfers to Walker-affiliated entities (e.g., Walker Aggregates Inc. and Woodington Systems Inc.). Of the 129 suppliers identified, 54 (42%) are located within the LSA and 66 (51%) within the broader Niagara Region, accounting for approximately 76% and 77% of external procurement expenditures, respectively. The single largest supplier is L. Walter & Sons Excavating Ltd of Niagara Falls, representing approximately 45% of external procurement spend. Six of the top 10 suppliers are based within the LSA. The five largest suppliers including L. Walter & Sons, NPL Canada Ltd (Thorold), Terrafix Environmental Technology Inc (Toronto), WSP Canada Inc (St. Catharines), and Sid Grabell Contracting Ltd (Thorold), collectively account for over 75% of total expenditures, with four of the five located in the LSA. The concentration of procurement activity shows that the South Landfill's ongoing operations generate direct economic benefit to local businesses across sectors including excavating, underground utilities, environmental technology, engineering consulting, and electrical contracting.

Table 13: Top 10 Suppliers to South Landfill

Supplier	Company Type	Municipality	Percentage of Expenditures
L. Walter & Sons Excavating Ltd	Excavating / Site Contractor	Niagara Falls	45.4%
NPL Canada Ltd	Underground Utility Contractor	Thorold	11.6%
Terrafix Environmental Technology Inc	Environmental Technology / Geosynthetics	Toronto	11.1%
WSP Canada Inc	Engineering Consulting	St. Catharines	3.9%
Sid Grabell Contracting Ltd	Electrical Contractor	Thorold	3.9%

Supplier	Company Type	Municipality	Percentage of Expenditures
Niagara on the Lake, Town	Municipality (sanitary sewer)	Niagara-on-the-Lake	3.4%
Comcor Environmental Ltd	Environmental Consulting	Cambridge	1.8%
Joseph Haulage Canada Corp	Heavy Haulage / Transportation	Hamilton	1.6%
Noll Drilling Inc.	Drilling Contractor	Woolwich	1.0%
Bob Robinson & Son Construction	Sewer / Site Contractor	Thorold	1.0%

Source: (Walker Industries Ltd., 2026b) (Avaanz Ltd., 2026).

In addition to the procurement relationships documented above, two of the five LSA business operators interviewed reported commercial connections with Walker as a customer for the services they provide.

4.2.7 Tourism

Tourism is a defining sector of the LSA economy. This section first sets out the structure of the LSA and RSA tourism sector, including geographic differentiation across municipalities, visitor composition, and overall scale, and then documents the employment and revenue trends that predate the project.

The Niagara Region receives over 7.5 million trips annually, supported by over 4,375 tourism-oriented businesses (Niagara Economic Development, 2026a). Provincial tourism data indicate that the visitor base to Niagara Region is predominantly domestic. Ontario residents accounted for approximately 96% of the 8.3 million person visits recorded in 2022, with same-day trips representing 64.3% of visits and pleasure travel the primary trip purpose (Ministry of Tourism, Culture and Sport, 2023). This domestic, same-day orientation means the sector's performance is driven primarily by local and provincial economic conditions and perception of the destination, rather than by international travel patterns. Visitation is strongly seasonal, with the third quarter accounting for 38.6% of annual person visits and the first quarter 14.0% (Ministry of Tourism, Culture and Sport, 2023).

Within the LSA, tourism takes distinct forms across municipalities. Niagara Falls is an internationally recognised destination anchored by the falls and iconic attractions including Fallsview Casino (Tourism Partnership of Niagara, 2024). Niagara-on-the-Lake is oriented toward food, wine, and cultural tourism, known for its wineries and cultural experiences including the Shaw Festival (Town of Niagara-on-the-Lake, n.d.) (Tourism Partnership of Niagara, 2024). St. Catharines' tourism is centred on cultural assets, sports facilities, the Canal Corridor, and an emerging wine and craft beverage scene (City of St. Catharines, n.d.). Thorold's strategic plan identifies cultural heritage and attractions as assets to cultivate a tourist base (City of Thorold, n.d.). This geographic differentiation means that tourism sensitivity is not uniform across the LSA; the types of tourism most oriented toward environmental amenity and visitor experience are

concentrated in Niagara-on-the-Lake and Niagara Falls. The scale and composition of the regional visitor base provide further context for this assessment.

Interviews with tourism, economic development, and business associations provided baseline context on the sector's current conditions. Interviewees described tourism as recovering, with visitor volumes continuing to grow and demand remaining high, but operators face cost pressures, labour challenges, and shifting traveller expectations. Some sub-areas of the LSA reported a strong 2024 summer season, with visitor levels back to pre-COVID levels. Tourism in parts of the LSA was noted to attract a different visitor segment than Niagara Falls and was less affected as a result.

Challenges identified at the regional level included rising operating costs, transportation and mobility constraints, seasonal variability, border flow issues, labour challenges, housing pressures affecting workforce availability, and global economic uncertainty influencing discretionary travel. At the local level, the uncertainty in the political climate was identified as causing businesses to pause investments. Visitor numbers were reported as stable to growing with strong weekend and peak-season performance, and higher per-trip spending influenced by inflation. U.S. visitation was described as very strong in 2024 but softened in 2025 with increasing Canada–U.S. trade tensions, while domestic and international visitor interest increased in 2025. Regional tourism numbers were reported as having started to climb back but that the summer of 2025 was hit hard again, with an increase in Canadian tourists and a recovery in European markets that had not yet reached pre-pandemic levels. Seasonal patterns showed summer operators running at or near capacity, strengthening shoulder seasons, and soft winter performance. It was also observed that some tourism operators are hesitant to invest in upgrading hotels, opening new restaurants, or developing new attractions while visitor numbers remain below the levels needed to justify those investments. An experience-driven trend was identified in the wine tourism segment, with visitors increasingly seeking experiential offerings rather than wine purchases alone.

The outlook was described as cautiously optimistic, with demand from Ontario and near-U.S. markets remaining strong, influenced by economic conditions, fuel prices, border efficiency, transportation improvements including GO rail expansion and QEW investments, and continued product development in experience-based tourism. Ongoing investment in tourism infrastructure was noted, including new higher-end hotels under construction in Niagara-on-the-Lake as part of a strategy to diversify beyond wineries and extend visitor stays. These interview responses provide qualitative context for the employment and visitor spending patterns.

Table 14 presents tourism employment by sector for the LSA and RSA from 2018 to 2024, along with average wages. Total tourism employment in the LSA declined by 31.4% over this period, a contraction more than 50% more severe than the RSA's 20.1% decline. Losses were concentrated in accommodation and hospitality (-32.3%) and arts, entertainment, and recreation (-43.9%), while transportation grew (+44.6%) and beverage manufacturing remained relatively stable (-4.6%). Average wages across tourism sectors are substantially lower than the LSA's overall industry average of \$54,000, with the largest employment category (accommodation and

hospitality) paying under \$25,000, indicating that the sector's per-job contribution to labour income is modest.

Table 14: LSA Tourism Sector Jobs and Average Wages, 2018-2024

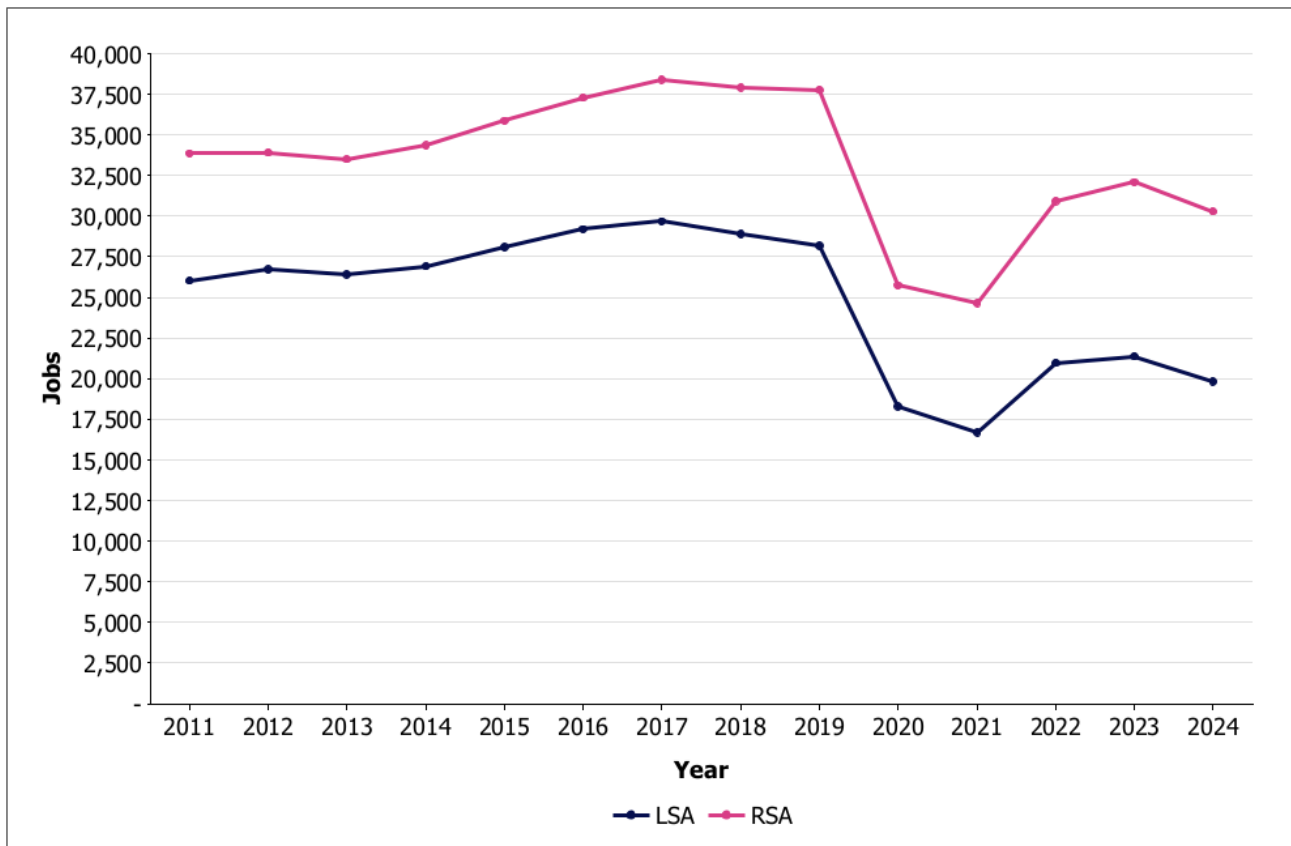
Tourism Sector	2024 Jobs		% Change (2018-2024)		Average Wages
	LSA	RSA	LSA	RSA	
Accommodation and Hospitality	13,930	21,090	-32.3%	-20.9%	\$24,600
Arts, Entertainment, and Recreation	3,400	5,450	-43.9%	-31.3%	\$39,300
Transportation	940	1,260	44.6%	44.8%	\$37,500
Travel Arrangement and Reservation Services	310	500	0.0%	16.3%	\$55,600
Beverage Manufacturing	1,250	2,000	-4.6%	-1.5%	\$43,400
Total Tourism	19,830	30,300	-31.4%	-20.1%	\$25,800

Source: (Lightcast, 2025c), (Avaanz Ltd., 2026)

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

Figure 5 illustrates total tourism jobs in the LSA and RSA from 2011 to 2024. Both geographies followed similar paths (growth through 2017, a pre-pandemic softening, a sharp pandemic contraction, and partial recovery) but the RSA demonstrated greater resilience at every phase. The RSA's pre-pandemic decline was less severe, its pandemic contraction smaller, and its post-2021 recovery stronger. By 2024, neither geography had returned to pre-pandemic employment levels, but the widening gap between the two confirms that the LSA's tourism decline is a long-term, pre-existing trend rather than purely cyclical. The local tourism sector was already underperforming the region and shedding employment before the expansion was proposed.

Figure 5: LSA and RSA Total Tourism Industry Jobs by Community, 2011-2024



Source: (Lightcast, 2025c), (Avaanz Ltd., 2026)

Table 15 presents tourism sector sales for the LSA and RSA in 2023. The LSA generated approximately \$3.0 billion in tourism sales, representing 70.0% of the RSA’s \$4.2 billion total, a share that exceeds the LSA’s 57.4% share of total industry sales. This concentration means that the sector’s pre-existing decline has a more pronounced effect on the LSA economy than regional averages suggest.

Table 15: LSA and RSA Tourism Sector Sales, 2023

Tourism Sectors	LSA	RSA
Accommodation and Hospitality	\$1,819,680,000	\$2,508,951,000
Arts, Entertainment, and Recreation	\$504,225,000	\$706,800,000
Transportation	\$123,840,000	\$202,957,000
Travel arrangement and reservation services	\$26,103,000	\$49,390,000
Beverage manufacturing	\$497,331,000	\$776,075,000
Total	\$2,971,179,000	\$4,244,173,000

Source: (Lightcast, 2025c), (Avaanz Ltd., 2026)

Figure 6 shows tourism sales in the LSA and RSA from 2011 to 2023. Revenue followed the same shape as employment: pre-pandemic growth in both geographies, a sharp pandemic contraction, and a divergent recovery. By 2023 the RSA had exceeded its pre-pandemic tourism sales peak, while the LSA remained below it. The LSA's tourism revenue weakness is therefore not a regional phenomenon but a local condition.

Figure 6: LSA and RSA, Tourism Sector Sales, 2011-2023



Source: (Lightcast, 2025d), (Avaanz Ltd., 2026)

Tourism in the LSA is in long-term, structural decline that preceded the proposed undertaking. The decline was deepened by pandemic disruption, and recovery has been slowed by labour availability and rising operating costs. The tourism labour market is contracting and pays wages substantially below the LSA industry average.

4.2.8 Farms

The agricultural sector accounts for a small share of the LSA's total employment but is significant to the economic identity of the study area, particularly in Niagara-on-the-Lake where vineyard, greenhouse, and agritourism enterprises are concentrated. The data presented below document a

sector that is structurally consolidating toward fewer, more productive operations, and in long-term employment decline that preceded the proposed undertaking.

The 2021 Census of Agriculture (Statistics Canada, 2023) recorded 496 farms across the four LSA municipalities, operating on a combined 40,749 acres. Agricultural activity is unevenly distributed. Niagara-on-the-Lake alone accounted for 299 farms on 18,630 acres, reflecting dense, small-lot intensive production in vineyards, greenhouse operations, and agritourism enterprises. In contrast, Niagara Falls and Thorold together accounted for 112 farms on 17,567 acres, a similar total land base but with fewer, larger-acreage operations characteristic of extensive rather than intensive agriculture. Their agricultural contribution to the regional economy is correspondingly modest: Niagara Falls accounts for 0.8% of regional agricultural GDP, and the Thorold/Welland reporting unit (which combines Thorold with Welland in the source data) accounts for a further 2.4% (Niagara Economic Development, 2022). Agritourism, including wine country tourism and culinary experiences, was identified by tourism and economic development organisations as a significant component of the LSA's economic identity, with agricultural activity and related tourism concentrated in Niagara-on-the-Lake.

In Niagara-on-the-Lake, where the majority of LSA agricultural activity is concentrated, conditions were described as stable, with the sector anchored by specialty crop production on some of Ontario's most fertile soils. The 2024 growing season produced high-quality fruit despite dry conditions, supported by the community's irrigation infrastructure. Greenhouse exporters to the United States were reported as stable at the time of interviews but identified as a significant vulnerability, with the potential for tariff escalation described as potentially catastrophic for some larger operations. Wine exporters were also reported as affected by tariffs, though export volumes are relatively small.

A tension was identified in Niagara-on-the-Lake between the shift toward experience-based agritourism and the constraints of protected agricultural lands, which limit what businesses can offer on their properties. This constraint has been an ongoing challenge, with efforts underway to find workable arrangements with agricultural operators. Consumer preferences were reported as shifting from product purchasing toward experiential offerings, requiring the community's agricultural tourism sector to diversify while wineries remain central to the local economy.

Provincial funding has been secured for the modernisation and augmentation of Niagara-on-the-Lake's irrigation system, with the aim of bringing water security to an additional 4,000 acres. This investment was described as imperative given recurring dry summers and its role in supporting both food security and the long-term viability of farming operations in the community. Agricultural innovation is supported through institutional partnerships with Niagara College, Brock University, and the Vineland Research and Innovation Centre.

At the regional level, the Niagara agricultural sector comprised 1,651 farms in 2021, oriented toward high-value specialty production (greenhouse, nursery and floriculture operations and fruit and tree nut farming) with Niagara's farms accounting for 3.4% of Ontario's total number but 5.1% of provincial agricultural GDP, indicating above-average per-farm productivity consistent with the consolidation trend documented below. While total farm count declined by 18.0% between

2011 and 2021, gross farm receipts increased by 39.7% over the same period, reflecting a structural trend toward fewer, more productive operations (Statistics Canada, 2023) (Niagara Economic Development, 2022) (Niagara Economic Development, 2018).

Table 16 presents farm industry employment by community for the LSA, with RSA comparison, from 2018 to 2024 along with average wages. The LSA’s farm sector contracted by 19.3% over this period, with losses concentrated in Niagara-on-the-Lake, which lost 300 of the LSA’s 380 farm jobs. The RSA experienced a less severe decline of 7.8%, consistent with the local-to-regional divergence observed across all sectors. Average farm wages of \$37,000 are approximately 31% below the LSA’s overall industry average of \$54,000, indicating that the sector’s per-job contribution to total labour income is comparatively modest.

Table 16: LSA Farm Industry Jobs and Average Wages, 2018-2024

Study Area	2018 Jobs	2024 Jobs	Change	% Change	Average Wages
Niagara Falls	130	120	-10	-7.7%	\$37,000
Niagara-on-the-Lake	1,170	870	-300	-25.6%	\$37,000
St. Catharines	590	560	-30	-5.1%	\$37,000
Thorold	80	30	-50	-62.5%	\$37,000
LSA	1,970	1,590	-380	-19.3%	\$37,000
RSA	5,380	4,960	-420	-7.8%	\$37,000

Source: (Lightcast, 2025c), (Avaanz Ltd., 2026)

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

Table 17 presents farm industry sales by community for 2023. The LSA generated \$1.06 billion in farm sales, representing 34.8% of the RSA’s \$3.04 billion total. The geographic concentration mirrors the employment pattern. Niagara-on-the-Lake accounted for 58% of LSA farm sales, indicating that the agricultural value most relevant to this assessment is concentrated in Niagara-on-the-Lake.

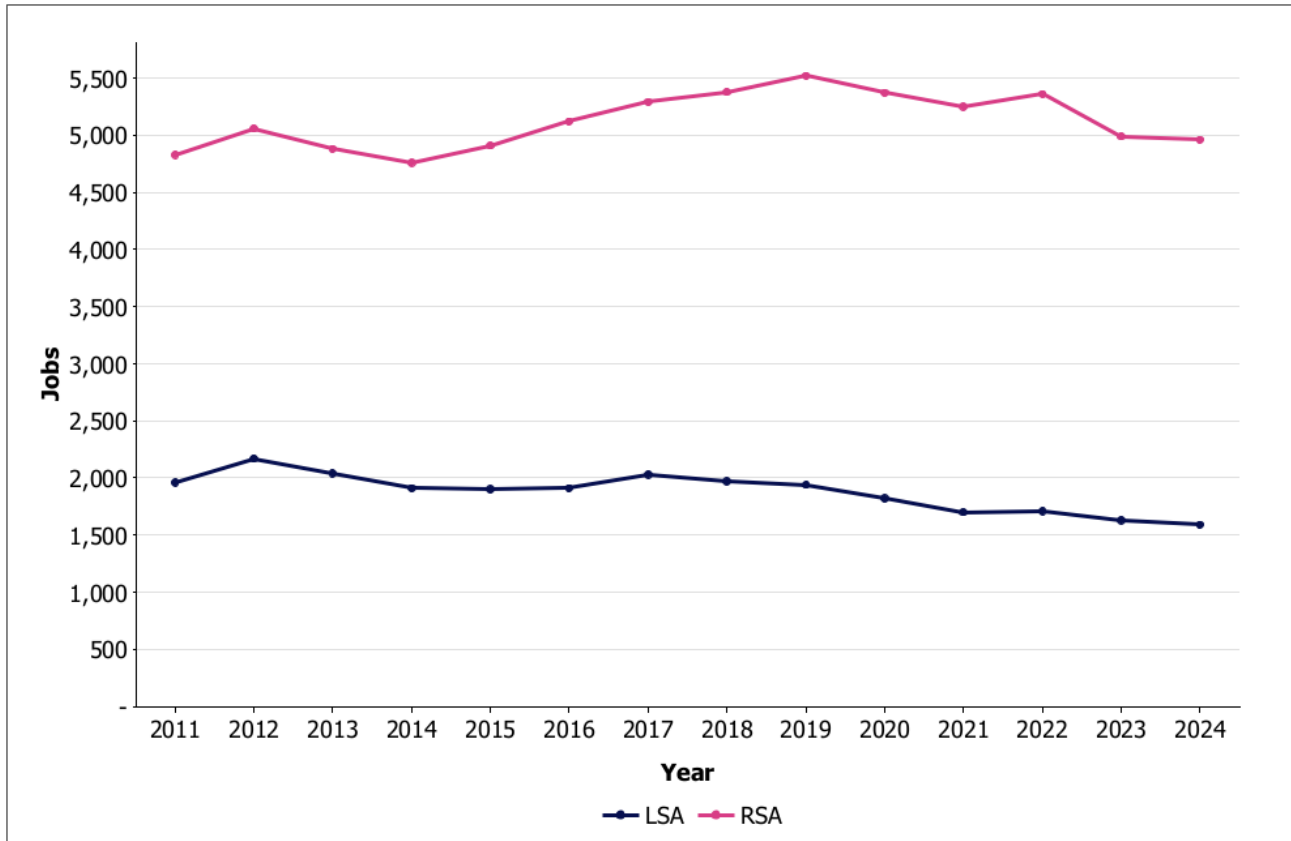
Table 17: LSA Farm Industry Sales by Community, 2023

Community	Sales	Distribution
Niagara Falls	\$54,010,000	1.8%
Niagara-on-the-Lake	\$616,209,000	20.3%
St. Catharines	\$379,412,000	12.5%
Thorold	\$8,233,000	0.3%
LSA	\$1,057,865,000	34.8%
RSA	\$3,040,627,000	100.00%

Source: (Lightcast, 2025d), (Avaanz Ltd., 2026)

Figure 7 illustrates farm employment in the LSA and RSA from 2011 to 2024. The two geographies show divergent paths. The LSA has been in general decline since 2012, while the RSA grew from 2014 through 2019 before entering a period of contraction. Since 2019, both have declined, but the LSA’s losses have been proportionally steeper. This pattern was underway well before the expansion was proposed.

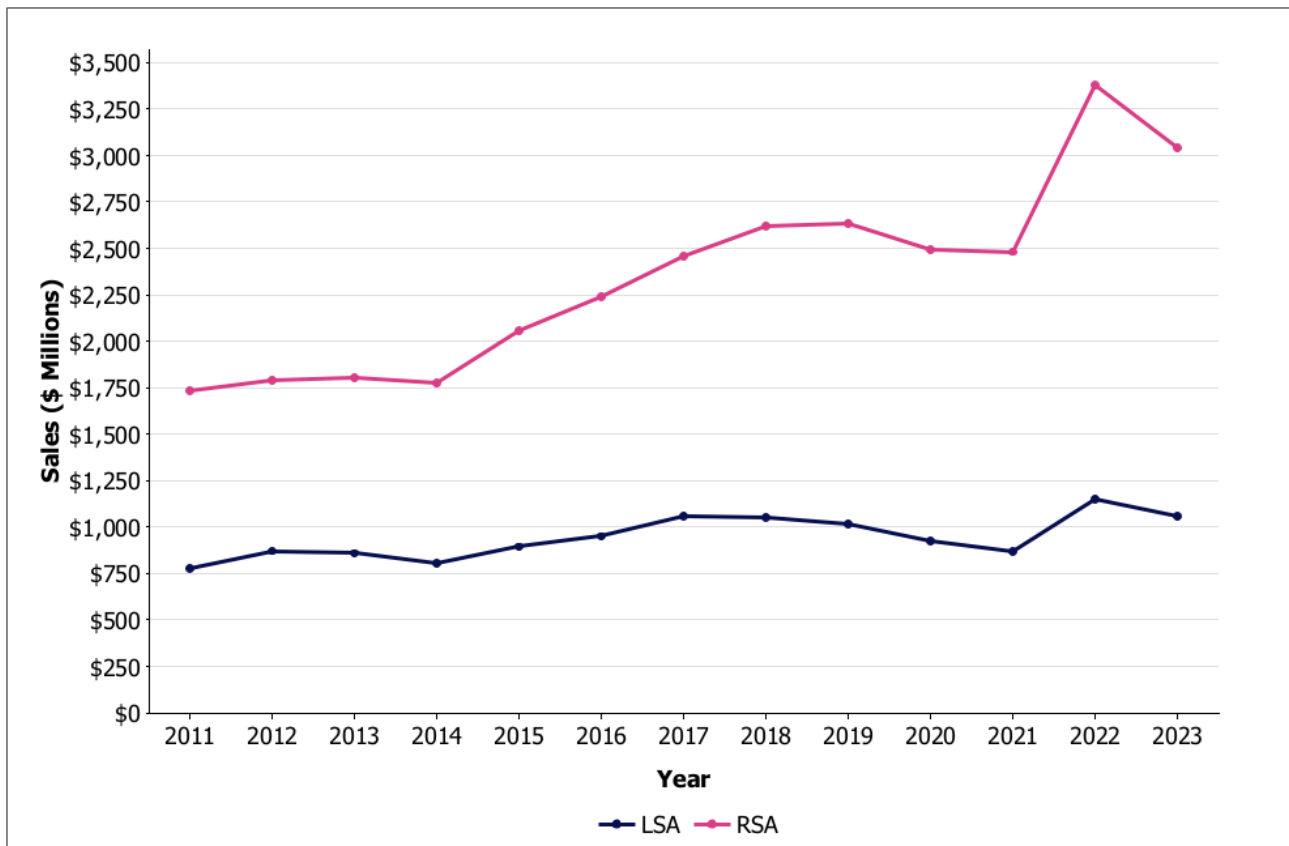
Figure 7: LSA and RSA Farm Industry Jobs, 2011-2024



Source: (Lightcast, 2025c), (Avaanz Ltd., 2026)

Figure 8 illustrates farm sales in the LSA and RSA from 2011 to 2023. The RSA saw significantly stronger growth leading up to the pandemic, a smaller decline during the initial pandemic years, and a stronger recovery, with sales increasing 75% across the full period. The LSA’s sales growth was more modest, and while both geographies recovered post-2021, the gap between them widened. This revenue divergence is consistent with the employment pattern in **Figure 7** and confirms that the LSA’s farm sector is underperforming the region.

Figure 8: LSA and RSA Farm Industry Sales, 2011-2023



Source: (Lightcast, 2025d), (Avaanz Ltd., 2026)

The pattern in agriculture shows long-term employment contraction in the LSA that preceded the project and exceeds the regional rate. The sector is consolidating toward fewer, more productive operations, and agricultural activity and sensitivity are geographically concentrated in Niagara-on-the-Lake.

4.2.9 Gross Domestic Product (GDP)

Gross domestic product provides the aggregate measure of regional economic output. This subsection presents real GDP (in constant 2017 dollars) for the four LSA communities, the LSA in aggregate, and the St. Catharines–Niagara CMA over the period Q3 2023 to Q3 2025, characterising the scale and recent growth of the regional economy within which the project's GDP effects would occur.

Table 18 presents real GDP for the LSA, the four LSA communities, and the CMA at two points: Q3 2023 and Q3 2025. Over this two-year window, the LSA grew by 2.3%, below the CMA's 3.2%, extending the local-to-regional divergence documented in the preceding labour force and industry sections. Performance within the LSA was uneven: Thorold and St. Catharines drove most of the regional change, while Niagara Falls (the host municipality) and Niagara-on-the-Lake fell below the LSA average, with Niagara-on-the-Lake contracting over the period. The host municipality has

therefore been a slower-moving component of an LSA that has itself trailed the CMA over the baseline period.

Table 18: LSA and CMA GDP at Basic Prices (2017 \$ Millions), Q3 2023-Q3 2025

Community	2023 Q3	2025 Q3	Change	% Change
Niagara Falls	\$4,245	\$4,283	\$39	0.9%
Niagara-on-the-Lake	\$1,279	\$1,258	\$-21	-1.6%
St. Catharines	\$6,929	\$7,098	\$169	2.4%
Thorold	\$1,128	\$1,254	\$125	11.1%
LSA	\$13,581	\$13,891	\$310	2.3%
St. Catharines-Niagara CMA	\$20,320	\$20,980	\$660	3.2%

Source: (Avaanz Ltd., 2026), (Niagara Region, 2025)

Although the LSA accounts for roughly two-thirds of CMA economic output, its expansion over the baseline period has trailed the CMA and has been distributed unevenly across communities, with the host municipality among the slower-changing. The regional economy is substantial in scale but its recent growth has been uneven, with the host municipality lagging both the LSA and CMA.

4.2.10 Distribution of Household Expenditures

The distribution of household expenditures establishes the baseline pattern of consumer spending across consumption categories in Ontario. Because Statistics Canada does not publish this profile below the provincial level, the Ontario distribution is treated as the best available proxy for household consumption behaviour in the LSA and RSA. This distribution governs how labour income earned in the local economy translates into demand at specific commercial sectors (food retailers, shelter providers, transportation services, and so on), and therefore underpins the assessment of induced economic effects.

Table 19 presents the Ontario household expenditure profile across the nine consumption categories applied in this assessment.

Table 19: Distribution of Household Expenditures Ontario (2023)

Category	Percentage
Food	14.4%
Shelter	35.8%
Household operations and furnishings	12.0%
Clothing and accessories	3.8%

Category	Percentage
Transportation	14.6%
Health and personal care	5.9%
Recreation	6.3%
Education	2.5%
Other	4.8%
Total Consumption	100.0%

Source: (Avaanz Ltd., 2026), (Statistics Canada, 2026b)

4.3 Property Values

4.3.1 Local Study Area

4.3.1.1 Niagara-on-the-Green

Niagara-on-the-Green is a residential subdivision within the Town of Niagara-on-the-Lake's Glendale Secondary Plan Area, bounded by Glendale Avenue to the north, Taylor Road to the west, and the Royal Niagara Golf Club to the south. Developed in three phases between just before 2000 and 2014, the subdivision contains approximately 465 households across a mix of two-storey single-family detached, semi-detached, and townhouse units on smaller suburban lots, with just under 2,000 residents recorded in the 2021 Census (Hardaker, 2023). The neighbourhood offers convenient access to the Queen Elizabeth Way, the Outlet Collection at Niagara, and Niagara College's Niagara-on-the-Lake campus. The closest portion of the subdivision lies approximately 1,984 metres north of the proposed Phase 2 boundary, placing it within the 2-kilometre LSA around the Walker Resource Management Campus.

Between January 2009 and November 2023, Geowarehouse records identify 197 single-family detached home sales in Niagara-on-the-Green. These homes occupied lots ranging from 2,368 to 8,815 square feet (mean 4,988 square feet). Annual mean sale prices climbed gradually from approximately \$320,000 in 2009 to roughly \$410,000 in 2015, stepped up to nearly \$490,000 in 2016 and into the \$600,000s by 2017, held in that range through 2020, and accelerated to approximately \$1,090,000 by 2022.

4.3.1.2 Downtown Thorold and Merritton St. Catharines

This portion of Downtown Thorold and Merritton St. Catharines lies within the 2-kilometre radius of the Walker Resource Management Campus, immediately west of the Welland Canal. Housing stock includes brick homes, bungalows, detached and semi-detached homes, townhouses, and multi-unit properties. The stock spans the late 19th century through more recent construction (Remax Hendriks Team Realty, 2026a) (Remax Hendriks Team Realty, 2026). Streets follow a traditional grid, with access to local commercial areas and Highway 406.

Between January 2009 and November 2023, Geowarehouse records identify 500 single-family detached home sales in this area (372 in Thorold and 128 in Merritton). These homes occupied lots ranging from 1,421 to 37,706 square feet (mean 5,920 square feet, median 5,474 square feet). Annual mean sale prices climbed gradually from approximately \$160,000 in 2009 to approximately \$220,000 by 2016 and approximately \$300,000 by 2019, accelerated to a peak of approximately \$580,000 by 2022, and eased to approximately \$510,000 across the first eleven months of 2023.

4.3.1.3 Rural Residential

The area to the south, north, and east of the Walker Resource Management Campus within the 2 km LSA encompasses rural residential properties spanning the City of Niagara Falls, the Town of Niagara-on-the-Lake, and the City of Thorold. A portion of the rural residential lies within the City of Niagara Falls's Northwest Secondary Plan (NWSP) area, a Designated Greenfield Area brought into the City's Urban Area boundary through the Niagara Region Official Plan approved in November 2022 and designated to accommodate forecasted urban growth (MHBC, 2026). Urban development under the Secondary Plan has yet to occur; preparation of the Plan is at an early stage.

Among single-family rural-residential properties on lots of 5 acres or less, located more than 100 metres from the urban fringe, and excluding transactions where Walker Industries Holdings Limited or Walker Community Development Corporation was a party, Geowarehouse records identify 51 single-family detached home sales in this area between January 2009 and November 2023. These homes occupied lots ranging from 0.35 to 4.74 acres (mean 1.51 acres, median 1.05 acres). Annual mean sale prices ranged from approximately \$250,000 to \$390,000 between 2009 and 2015, advanced into the \$440,000–\$730,000 range between 2016 and 2020, and reached approximately \$940,000 by 2022.

4.3.1.4 Mount Camel

Mount Carmel is an established, residential neighbourhood in the City of Niagara Falls east of the Walker Resource Management Campus. The neighbourhood is considered one of the city's more prestigious residential areas, primarily composed of single-family detached homes on larger suburban lots (Remax Hendriks Realty, 2026c). Natural features include Shriner's Creek and Shriner's Woodlot Park. The neighbourhood provides close access to the Queen Elizabeth Way and local commercial areas.

Within the relatively uniform interior residential portion of Mount Carmel set back from Kalar Road, within the 2-kilometre LSA and bounded by Shriner's Woodlot Park to the south and the agricultural fields of the City of Niagara Falls's Northwest Secondary Plan area to the north, Geowarehouse records identify 69 single-family detached home sales between January 2009 and November 2023. These homes occupied lots ranging from 9,591 to 20,451 square feet (mean 13,156 square feet, median 12,992 square feet). Annual mean sale prices ranged from approximately \$460,000 to \$650,000 between 2009 and 2016, advanced into the \$820,000–\$910,000 range between 2017 and 2020, accelerated to a peak of approximately \$1,570,000 by 2022, and eased to approximately \$990,000 across the first eleven months of 2023.

Distinct from the relatively uniform interior portion of Mount Carmel described above, a separate cluster of properties sits along the western urban boundary on Kalar Road and the connecting Vegter Court cul-de-sac. Between January 2009 and November 2023, Geowarehouse records identify 14 single-family detached home sales involving 11 properties on Kalar Road and Vegter Court. Recorded lot sizes ranged from 5,145 to 13,606 square feet (mean 7,713 square feet, median 6,082 square feet), with most sales on smaller cul-de-sac infill lots and three properties (8311 Vegter Court, 3750 Kalar Road, and 8320 Vegter Court) within the interior Mount Carmel range. Annual mean sale prices climbed from approximately \$290,000 across 2009–2012 to approximately \$460,000 across 2015–2016, advanced into the \$680,000–\$920,000 range between 2018 and 2022, and rose to approximately \$1,300,000 in the single 2023 transaction recorded across the first eleven months of the year.

4.3.1.5 Thorold South

Thorold South is an established residential community in the southern part of the City of Thorold, set between the Welland Canal to the west and a corridor of industrial lands to the north. Housing stock is predominantly mid-century bungalows, side-splits, and 1.5-storey homes, with semi-detached units and more recent infill on smaller suburban lots. The community lies within the 2-kilometre LSA around the Walker Resource Management Campus, borders the Welland Canal Parkway Trail, and has direct access to Highway 58 (Remax Hendriks Team Realty, 2026d).

Between January 2009 and November 2023, Geowarehouse records identify 11 single-family detached home sales in Thorold South within the LSA, involving five properties on Niagara Falls Road and Mackan Street, with the earliest recorded transaction in August 2012 and roughly one sale per year thereafter. These homes occupied lots ranging from 4,801 to 8,837 square feet (mean 6,009 square feet, median 5,059 square feet). Annual mean sale prices held at approximately \$130,000 between 2012 and 2015, stepped up to approximately \$180,000 across three transactions in 2016, \$270,000 in 2017, and \$410,000 in 2019, advanced to approximately \$470,000 in 2021 and \$550,000 in 2022, and eased to approximately \$500,000 in the single transaction recorded across the first eleven months of 2023.

4.3.2 Real Estate Market

This section establishes baseline real estate market conditions in the LSA and RSA. The data describe sales activity and pricing trends for detached homes from 2018 to 2025, supplemented by industry commentary and institutional analysis that characterise the forces shaping the market over this period. The South Landfill Phase 2 announcement in 2023 is marked on each figure to distinguish pre and post announcement market conditions.

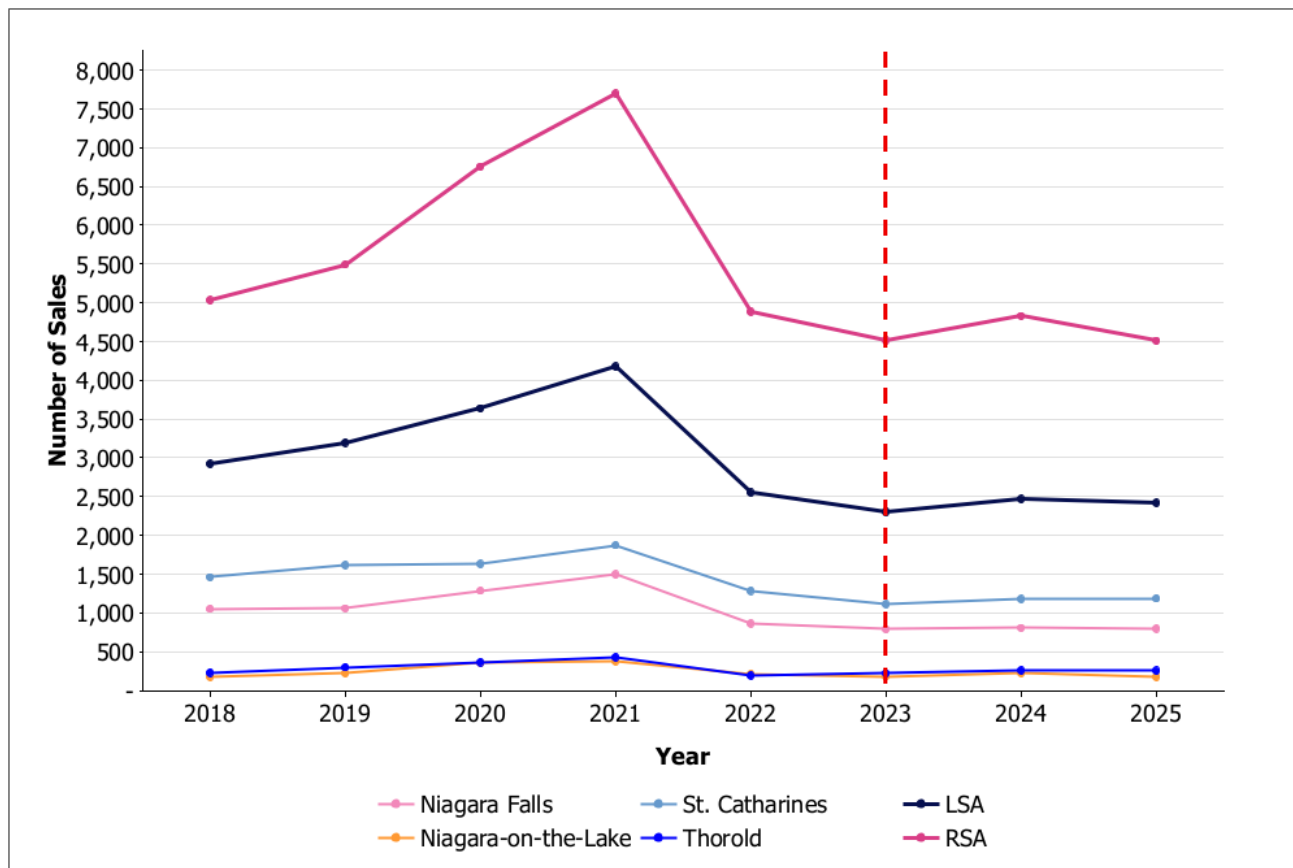
4.3.2.1 Sales

Figure 9 presents annual detached home sales for the LSA and RSA from 2018 to 2025. Detached homes are the dominant housing type in the LSA, accounting for 71-75% of residential sales across the period (McGarr Realty Corp. 2019-2024; Bosley Real Estate, 2025-2026), making them the most sensitive indicator of residential market conditions for this assessment. Both geographies moved through a full market cycle over the baseline period, with the LSA representing 51-58% of

RSA sales in every year. The LSA’s consistent share of regional volume across the expansion, contraction, and stabilization phases provides the reference pattern against which post-announcement conditions will be measured.

Real estate industry commentary attributes the sales cycle to interest rate conditions. During the 2020-2021 surge, the Niagara Association of REALTORS® reported that, for the Niagara Region market, “historically low interest rates, higher demand and continued lower supply fuelled a 57% increase in the number of sales” (2020). Commenting on the decline of year-over-year sales for January 2023, the Association noted that “once again, the Bank of Canada has increased the interest rate... This causes sellers and buyers alike to naturally go into somewhat of a holding pattern as they wait to see what is coming next” (2023a). By fall 2023, the Association observed that “pent up demand is building in the region as people have begun to adjust to the higher cost of borrowing” (2023b).

Figure 9: LSA and RSA Detached Home Sales, 2018-2025



Source: (Avaanz Ltd., 2026a), (McGarr Realty Corp., 2019), (McGarr Realty Corp., 2020), (McGarr Realty Corp., 2021), (McGarr Realty Corp., 2022), (McGarr Realty Corp., 2023), (McGarr Realty Corp., 2024), (Bosley Real Estate, 2025), (Bosley Real Estate, 2026).

Note: Dashed line in Figure indicates year of Phase 2 announcement.

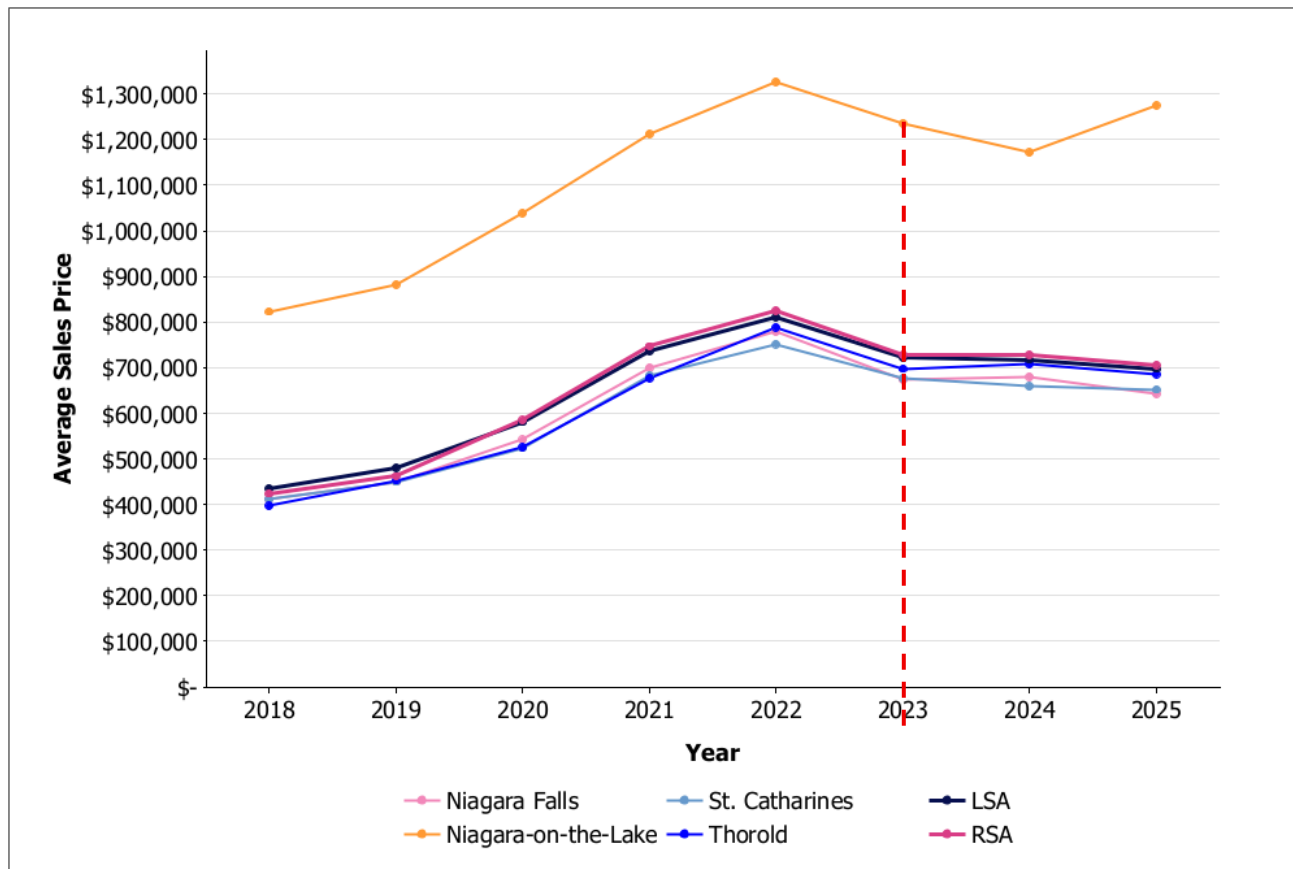
The sales volume data document a baseline characterised by a full cycle of expansion, contraction, and stabilization between 2018 and 2025, with industry sources attributing the cycle to interest rate conditions.

4.3.2.2 Average Sales Price

Figure 10 presents the average sales price of detached homes in the LSA and RSA from 2018 to 2025. Prices in the LSA and RSA tracked a market cycle consistent with the sales volume pattern, with appreciation through 2022, correction, and subsequent decline through 2025. Within the LSA, Niagara-on-the-Lake traded at approximately 1.7 to 2.1 times the other communities, reflecting a distinct market segment, while Niagara Falls, St. Catharines, and Thorold remained closely aligned, typically within 5% of each other. This community-level variation establishes the internal price structure of the LSA and will inform the selection of comparison areas in the property value analysis.

Industry commentary attributes the price movements to market-wide forces. McGarr Realty Corp. noted that the 2022 correction was unprecedented: “We began 2022 with average sale price for January at \$852,397 and ended the year out at \$659,452 for December, which is something foreign to us. Every year for the last 10 years we have ended with a higher sale price than initially” (McGarr Realty Corp., 2023). Bosley Real Estate characterised the 2020 to 2024 market cycle as shaped by external forces, “It was a confluence of events, which included the influx of buyers from the GTA, a global pandemic, and a roller-coaster ride of overnight interest rate changes. At its core, the data was driven by market sentiment” (Bosley Real Estate, 2025).

Figure 10: LSA and RSA Detached Average Sales Price, 2018-2025

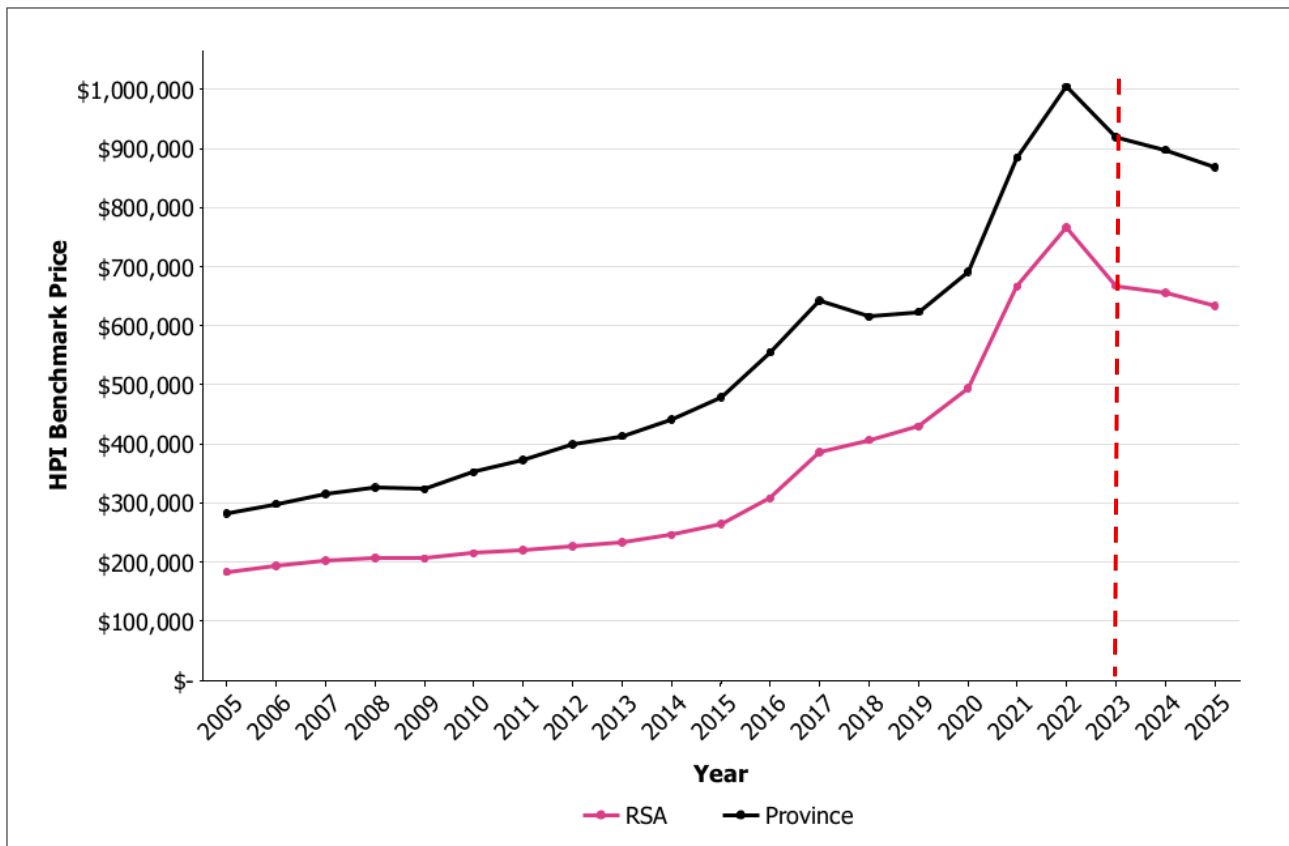


Source: (Avaanz Ltd., 2026a), (McGarr Realty Corp., 2019), (McGarr Realty Corp., 2020), (McGarr Realty Corp., 2021), (McGarr Realty Corp., 2022), (McGarr Realty Corp., 2023), (McGarr Realty Corp., 2024), (Bosley Real Estate, 2025), (Bosley Real Estate, 2026).

Note: Dashed line in Figure indicates year of Phase 2 announcement.

Figure 11 presents the MLS® Home Price Index (HPI) benchmark price for single-family detached homes in the RSA and Ontario from 2005 to 2025. The HPI Benchmark is a constant-quality price measure that controls for changes in the characteristics of homes sold, providing a more standardized measure of underlying price trends than average sale prices (CREA, 2022). Over the full twenty-year period, the RSA and Ontario tracked together, with the RSA consistently trading below the provincial benchmark. This longer time horizon extends the baseline reference beyond the annual data in **Figure 10**, establishing the RSA’s pricing relationship to the provincial market across multiple cycles.

Figure 11: RSA and Province Single Family Detached HPI Benchmark Price, 2005-2025



Source: (Avaanz Ltd., 2026a), (CREA, 2026a).

Note: Dashed line in Figure indicates year of Phase 2 announcement.

CMHC analysis provides independent context for the price dynamics shown in both figures. CMHC noted that “neighbouring southern Ontario markets have been shown to be highly correlated to Toronto prices” (2018). The 2020-2021 surge in Niagara was attributed to an inflow of homebuyers from outside of the region seeking affordability relative to GTA markets, with “demand for larger living spaces” driving migration from the Greater Golden Horseshoe (2022). The subsequent correction was attributed to interest rates: “Prices and sales have been declining since early 2022, when mortgage carrying costs became unaffordable for many potential buyers” (2023).

Bank of Canada monetary policy provides the national context for the price and sales movements documented above. The policy rate held between 1.00% and 1.75% from 2018 through early 2020, before emergency cuts to 0.25% in March 2020 in response to the COVID-19 pandemic (Bank of Canada, 2026), a level maintained through 2021 that coincided with the sales and price surge shown in **Figure 10** through **Figure 11**. Beginning in March 2022, ten consecutive rate increases brought the policy rate to 5.00% by July 2023, a 22-year high, with mortgage rates rising from approximately 2% to 5-7% (Bank of Canada, 2026) (Central 1, 2023). Four cuts in the second half of 2024 and four more in 2025 lowered the rate to 2.25% by October 2025 (Bank of

Canada, 2026), but market recovery remained modest nationally (CREA, 2025) (CREA, 2026b), with affordability headwinds persisting across the province (RBC Economics, 2025).

Provincial market analysis from Central 1 Credit Union traced the Ontario downturn to monetary policy. In early 2022, Central 1 reported that “higher bond yields and expectations of more rate tightening by the Bank of Canada poured cold water in the nation’s largest market,” triggering the first provincial price decline in eleven months (Central 1, 2022). By October 2023, the month before the project announcement, the provincial sales-to-new listings ratio had fallen to its lowest level “since November 2008 during the financial crisis” (Central 1, 2024). Central 1’s Ontario-wide data parallel the LSA and RSA declines described in the preceding sections, placing the local market within a province-wide monetary tightening.

LSA, RSA, and provincial markets moved together over the baseline period: prices rose through 2022 and have declined since. The Bank of Canada, Central 1, and CMHC each attribute the cycle to interest-rate policy and GTA-out migration.

4.3.2.3 Real Estate Professional Interviews

Interviews with two real estate professionals active in the Niagara Region were conducted for this assessment to supplement the quantitative baseline with practitioner perspectives on current market conditions. Seven brokerages and organisations were contacted; two interviews were completed. One real estate professional specialises in agricultural and rural residential properties across the north end of St. Catharines, Niagara-on-the-Lake, and surrounding rural areas. The second operates across the entire Niagara Region in both residential and commercial markets.

Both real estate professionals characterised current market conditions in subdued terms. One described the market as “modest to weak” since the February 2022 peak, noting that prices have declined 15 to 20 percent from that peak and that properties priced below \$550,000 continue to transact while those above \$750,000 face less demand and potential price reductions. The second described the market as “trickling along,” with properties moving when priced to current conditions but overall sales volume down from COVID-era levels.

Both real estate professionals attributed current market conditions to affordability pressure and economic uncertainty. One stated that the primary constraint is not interest rates at current levels but rather the price levels themselves. The second identified uncertainty in the broader economy, including tariff concerns and job stability, as the key factors suppressing activity. These professional attributions align with the institutional analysis presented in the preceding sections, where CMHC, Central 1, and the Niagara Association of REALTORS® each attributed the market cycle to monetary policy and affordability conditions.

Geographic variation within the region was noted by both real estate professionals. One identified Niagara-on-the-Lake as carrying 13 months of inventory as of August, a buyer's market, compared to St. Catharines at five months and Niagara Falls at six months, both in balanced market territory. Niagara-on-the-Lake was described as comprising five to six distinct sub-markets, with the Old Town sub-market identified as the primary driver of the regional overhang due to its concentration of cottage, secondary, and short-term rental properties and a council moratorium on building

permits in the historical district. South Niagara-on-the-Lake, including the St. Davids area near the Walker site, was characterised as a very different market from Old Town. By housing type, freehold properties were described as more desirable and selling faster, while condominiums regardless of price were reported as taking longer to sell with less demand. By property type, industrial properties were described as least affected by the downturn, agricultural land as very consistent, and commercial mixed-use as having maintained pricing. The second noted that entry-level residential properties have maintained their price point while higher-priced properties have softened, and that rental rates have declined from levels seen in prior years.

The interview responses provide qualitative context for the quantitative baseline. The market conditions described by both real estate professionals, including the price correction from the 2022 peak, the role of affordability and interest rate conditions, and the geographic and sector-level variation within the region, are consistent with the patterns documented in the sales, pricing, and institutional data presented above.

4.4 Public Finance

The financial health of municipalities in the LSA and RSA (the Niagara Region) is assessed through an examination of municipal revenues, expenditures, tax base, tangible assets, and environmental service costs. The analysis draws on data from municipal Financial Information Returns (FIRs), Statistics Canada, and internal studies by Avaanz Ltd. (2025a), reflecting the most recent year available (2024). The public finance baseline below covers municipal tax bases, population and housing growth, building permit activity, revenue sources, and financial stability across the LSA and the Niagara Region.

4.4.1 Population and Housing Growth

Population and housing growth across the study area shape the scale and distribution of demand for municipal services and characterise the fiscal pressures that LSA municipalities and the Niagara Region face. The data presented below document household and population trends for each LSA municipality and the RSA between 2018 and 2024, establishing where growth is concentrated and whether housing supply has kept pace with demographic expansion.

Table 20 presents population and household counts for each LSA community and the RSA in 2018 and 2024. Household growth across the LSA totalled approximately 5.2% over this period, but the distribution was uneven. Thorold and Niagara-on-the-Lake recorded the strongest gains, while St. Catharines was the only LSA municipality to register a household decline. Population growth was positive in all four communities, and at 9.5% across the LSA, exceeded the 5.2% household growth rate, indicating rising average household sizes and intensification of existing residential areas. Where population outpaces housing stock, per-household service demand increases without a proportionate expansion of the property tax base, making this disparity directly relevant to the fiscal assessment. Niagara Falls grew at 7.2%, below both the LSA average of 9.5% and the RSA's 14.1%, placing the host municipality below the regional rate of demographic expansion. Household growth, the unit on which municipal services are funded and the property tax base assessed, was 6.7% in Niagara Falls, above the LSA average of 5.2% and close to the RSA's 7.0%, indicating that

the host municipality's tax base is expanding broadly in line with the region even as population gains lag.

Table 20: Population and Households by Municipality, LSA and RSA, 2018 and 2024

		2018	2024	% Growth (2018 - 2024)
Population	Niagara Falls	88,071	94,415	7.2%
	Niagara on The Lake	15,370	19,088	24.2%
	St. Catharines	133,113	136,803	2.8%
	Thorold	18,801	29,343	56.1%
	LSA	255,355	279,649	9.5%
	RSA	472,448	539,180	14.1%
Households	Niagara Falls	37,846	40,379	6.7%
	Niagara on The Lake	7,069	8,386	18.6%
	St. Catharines	59,687	58,905	-1.3%
	Thorold	8,498	11,356	33.6%
	LSA	113,100	119,026	5.2%
	RSA	201,063	215,229	7.0%

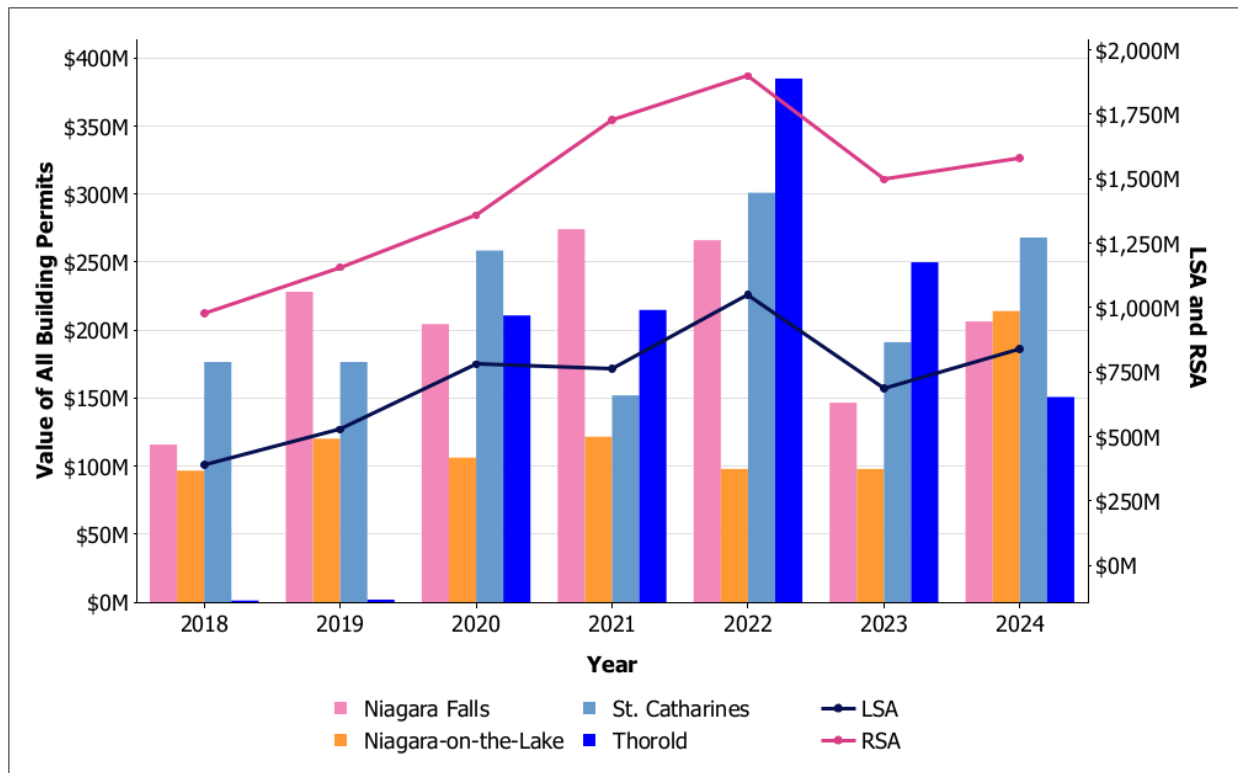
Source: (Avaanz Ltd., 2026) (Ontario Ministry of Municipal Affairs and Housing, 2025a) (Ontario Ministry of Municipal Affairs and Housing, 2025b) (Ontario Ministry of Municipal Affairs and Housing, 2026a) (Ontario Ministry of Municipal Affairs and Housing, 2025c) (Ontario Ministry of Municipal Affairs and Housing, 2025d).

4.4.2 Building Permit Activity

Building permit data track the pace and character of physical development across the study areas. The figures presented below cover the total number and value of permits issued between 2018 and 2024 for both the LSA and RSA, encompassing residential, multi-residential, and all other property classes. These metrics establish the rate of construction activity in the study areas over the reporting period.

Figure 12 presents the annual value of all building permits for the LSA and RSA between 2018 and 2024. Both geographies followed broadly parallel trajectories, rising through 2022, declining in 2023, and recovering partially in 2024. Over the full period, RSA permit values grew from approximately \$977 million to \$1.58 billion, an increase of 61.7%, while the LSA recorded proportionally stronger growth, more than doubling from \$390 million to \$839 million. The scale of annual permit activity visible in this figure establishes the volume of construction investment flowing through both study areas over the reporting period.

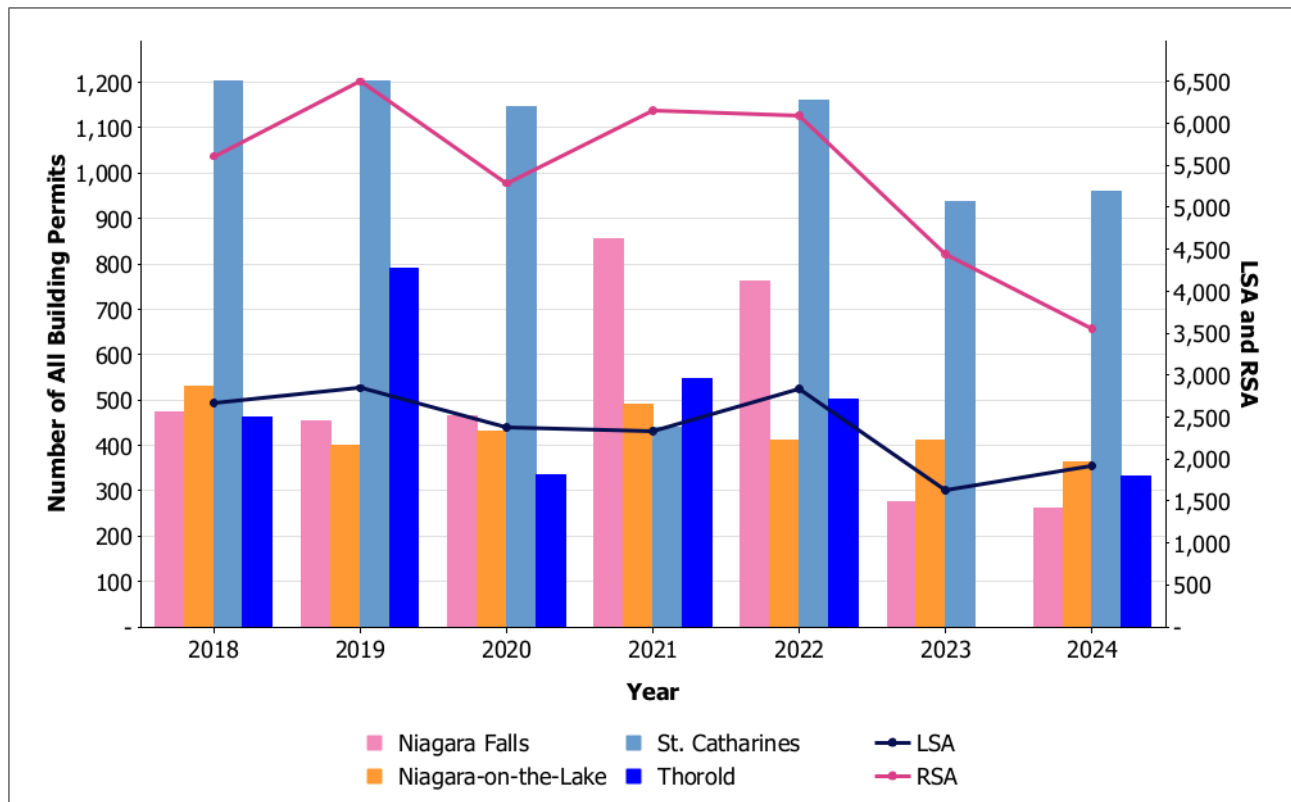
Figure 12: LSA and RSA Value of All Building Permits, 2018-2024



Source: (Avaanz Ltd., 2026) (Ontario Ministry of Municipal Affairs and Housing, 2025a) (Ontario Ministry of Municipal Affairs and Housing, 2025b) (Ontario Ministry of Municipal Affairs and Housing, 2025c) (Ontario Ministry of Municipal Affairs and Housing, 2025d) (Ontario Ministry of Municipal Affairs and Housing, 2025e) (Ontario Ministry of Municipal Affairs and Housing, 2025f) (Ontario Ministry of Municipal Affairs and Housing, 2025g) (Ontario Ministry of Municipal Affairs and Housing, 2025h) (Ontario Ministry of Municipal Affairs and Housing, 2025i) (Ontario Ministry of Municipal Affairs and Housing, 2025j) (Ontario Ministry of Municipal Affairs and Housing, 2025k)

Figure 13 presents the total number of building permits for the LSA and RSA over the same period. In contrast to the value trajectory, permit volumes declined in both geographies, with the RSA falling from 5,611 to 3,551 and the LSA from 2,669 to 1,918. Rising values alongside falling counts produced a shift in average per-permit values, which rose from \$146,184 to \$437,511 in the LSA (a 2.99x increase) and from \$174,166 to \$445,013 in the RSA (a 2.55x increase). The increase reflects a combination of construction cost escalation over the period and a compositional shift toward larger non-residential projects. Residential and multi-residential per-permit values rose roughly in line with construction cost inflation (1.7x to 2.2x), while All Other Property Classes, encompassing commercial, industrial, and other non-residential development, saw per-permit values rise more than fourfold in the RSA and sixfold in the LSA between 2018 and 2024.

Figure 13: LSA and RSA Number of All Building Permits, 2018-2024



Source: (Avaanz Ltd., 2026) (Ontario Ministry of Municipal Affairs and Housing, 2025a) (Ontario Ministry of Municipal Affairs and Housing, 2025b) (Ontario Ministry of Municipal Affairs and Housing, 2026a) (Ontario Ministry of Municipal Affairs and Housing, 2025c) (Ontario Ministry of Municipal Affairs and Housing, 2025d) (Ontario Ministry of Municipal Affairs and Housing, 2025e) (Ontario Ministry of Municipal Affairs and Housing, 2025f) (Ontario Ministry of Municipal Affairs and Housing, 2025g) (Ontario Ministry of Municipal Affairs and Housing, 2025h) (Ontario Ministry of Municipal Affairs and Housing, 2025i) (Ontario Ministry of Municipal Affairs and Housing, 2025j) (Ontario Ministry of Municipal Affairs and Housing, 2025k)

Permit volumes and values in both the LSA and RSA shifted between 2018 and 2024, with fewer permits issued at substantially greater aggregate values. Over the full period, LSA permit values grew at nearly twice the regional rate.

4.4.3 Municipal Tax Base

Assessed property values determine each municipality's capacity to raise tax revenue and fund local services, characterising the fiscal base that LSA and Niagara Region jurisdictions rely on. Table 21 presents the 2024 taxable assessment for the LSA and RSA, disaggregated by jurisdiction and property class.

Niagara Falls, the host municipality, has a total taxable assessment of \$12.7 billion, the second largest in the LSA after St. Catharines at \$15.8 billion. Composition varies across the four jurisdictions. Niagara Falls draws 22.0% of its assessed value from the "other" category, reflecting its commercial, industrial, office, and tourism-related property classes, the highest such share

among the four LSA municipalities. The remaining three jurisdictions are more heavily weighted toward the residential category, which includes residential and multi-residential property classes, with Thorold at 89.0%, St. Catharines at 84.6%, and Niagara-on-the-Lake at 75.3%.

Table 21: LSA and RSA Tax Base Composition, 2024 (\$ Millions)

Area	Residential		Farmland		Other		Total	
	\$	%	\$	%	\$	%	\$	%
Niagara Falls	\$9,846.3	77.4%	\$83.5	0.7%	\$2,793.2	22.0%	\$12,723.1	100.0%
Niagara-on-the-Lake	\$4,463.1	75.3%	\$584.4	9.9%	\$877.7	14.8%	\$5,925.2	100.0%
St. Catharines	\$13,394.4	84.6%	\$162.2	1.0%	\$2,272.1	14.4%	\$15,828.7	100.0%
Thorold	\$2,790.6	89.0%	\$53.0	1.7%	\$290.8	9.3%	\$3,134.4	100.0%
LSA	\$30,494.4	81.1%	\$883.1	2.3%	\$6,233.8	16.6%	\$37,611.4	100.0%
RSA	\$54,902.6	83.2%	\$2,536.6	3.8%	\$8,576.2	13.0%	\$66,015.4	100.0%

Source: (Avaanz Ltd., 2026) (Ontario Ministry of Municipal Affairs and Housing, 2026b) (Ontario Ministry of Municipal Affairs and Housing, 2025l) (Ontario Ministry of Municipal Affairs and Housing, 2025m) (Ontario Ministry of Municipal Affairs and Housing, 2025n) (Ontario Ministry of Municipal Affairs and Housing, 2025o).

At the study-area level, the residential category accounts for 81.1% of the LSA and 83.2% of the RSA, while the "other" category, encompassing commercial, industrial, office, shopping centre, managed forest, pipeline, and landfill property classes, represents 16.6% of the LSA versus 13.0% regionally. In dollar terms, the LSA's \$6.2 billion in non-residential assessment accounts for 72.7% of the RSA's \$8.6 billion total, indicating that the bulk of the region's commercial and industrial tax base is concentrated within the four LSA municipalities. Farmland accounts for the remaining 2.3% of the LSA and 3.8% of the RSA, a small share relative to the residential and other non-residential categories.

Across the LSA, the four municipalities collectively hold tax rolls of \$37.6 billion, representing 57.0% of the RSA's \$66.0 billion. Niagara Falls's \$12.7 billion total and 22.0% "other" share, the highest such share among the four LSA municipalities, position it as the most diversified municipality in the LSA by commercial and industrial property class. Combined with the concentration of nearly three quarters of the region's non-residential assessment within the LSA, these data describe the fiscal capacity of the four LSA municipalities and the Niagara Region.

4.4.3.1 Property Tax Rates and Classification

The tax rate applied to each property class determines the revenue that municipalities collect from a given level of assessment. In Ontario's two-tier system, the Regional Municipality of Niagara sets tax ratios for each property class relative to a residential base of 1.0, and the City of Niagara Falls applies these ratios in combination with its own municipal levy to produce the municipal and regional tax rate for each class. The landfill property class carries the highest tax ratio of any class in the Region at 2.940261, exceeding industrial (2.630000), aggregate extraction (2.140048), and

commercial (1.734900) (Niagara Region, 2025a). At the Niagara Falls level, the 2025 municipal and regional tax rate for landfill class is 5.273725%, compared with 4.810091% for industrial-occupied, 3.708941% for aggregate extraction, and 3.472516% for commercial-occupied properties. A provincial education levy of 0.055389% applies on top of the industrial-occupied rate and 0.036537% on top of the commercial-occupied rate; landfill and aggregate extraction classes are not subject to the education levy (City of Niagara Falls, n.d.). The Southeast Quarry occupies the footprint of the proposed South Landfill Phase 2.

4.4.4 Municipal Revenue

The composition of municipal revenue, particularly the balance between own-source income and government transfers, determines how sensitive a municipality's budget is to changes in its local tax base and economic activity. This section presents the 2024 revenue structure for each LSA municipality and the RSA.

Table 22 presents the 2024 revenue breakdown for each LSA municipality and the Regional Municipality of Niagara. The LSA municipalities collectively generated \$665 million in revenue. Property taxes and user fees, the two own-source categories, together accounted for \$464.8 million or 69.8% of the total. Government transfers represent 4.6% of LSA municipal income, with reserves and other revenue sources making up the balance. The contrast with the Niagara Region is structural. The Region derives 35.2% of its \$1.46 billion total from provincial and federal transfers, reflecting responsibility for cost-shared services such as social assistance and public health. At the municipal level, Niagara Falls generated \$266 million and St. Catharines \$262 million, together accounting for nearly four-fifths of LSA revenue. Niagara Falls draws a notably larger share of its income from user fees and other revenue sources than from property taxes alone.

Table 22: Revenue by Municipality, LSA and Niagara Region, 2024 (\$ Millions)

		Niagara Falls	Niagara-on-the-Lake	St. Catharines	Thorold	LSA	Niagara
Own Revenues	Taxes	\$100.7	\$18.3	\$123.6	\$26.5	\$269.1	\$609.1
	User Fees and Service Charges	\$75.7	\$19.9	\$81.4	\$18.7	\$195.7	\$223.5
	Sum of Own Revenues	\$176.4	\$38.2	\$205.1	\$45.2	\$464.8	\$832.6
Government Transfers	Federal	\$1.0	\$0.5	\$6.9	\$0.5	\$8.9	\$26.3
	Provincial	\$15.5	\$2.2	\$3.2	\$0.7	\$21.7	\$489.0
	Sum of Government Transfers	\$16.6	\$2.7	\$10.1	\$1.3	\$30.6	\$515.3
Reserves and Deferred Revenue		\$4.9	\$0.2	\$3.1	\$17.0	\$25.1	\$35.6

	Niagara Falls	Niagara-on-the-Lake	St. Catharines	Thorold	LSA	Niagara
Other Revenues	\$68.0	\$16.0	\$43.6	\$17.3	\$144.9	\$78.7
Total Revenue	\$265.9	\$57.1	\$261.8	\$80.7	\$665.4	\$1,462.2
Annual Surplus	\$58.9	\$11.6	\$30.3	\$28.3	\$129.1	\$128.5

Source: (Avaanz Ltd., 2026) (Ontario Ministry of Municipal Affairs and Housing, 2025a) (Ontario Ministry of Municipal Affairs and Housing, 2025b) (Ontario Ministry of Municipal Affairs and Housing, 2026a) (Ontario Ministry of Municipal Affairs and Housing, 2025c) (Ontario Ministry of Municipal Affairs and Housing, 2025d).

The revenue data establish that LSA municipalities fund their operations predominantly from own-source income, with minimal dependence on intergovernmental transfers. Niagara Falls generates the largest revenue base in the LSA and draws from a more diversified mix of sources than its neighbours. This revenue profile describes how the host municipality and its LSA peers structure their fiscal capacity.

4.4.5 Financial Performance

Revenue and tax base data describe what municipalities collect and what they own; financial performance metrics indicate whether those fiscal resources translate into operational stability. Liquidity, debt servicing capacity, operating surpluses, and infrastructure condition collectively describe the fiscal capacity of LSA and RSA municipalities to absorb changes in service demand or fiscal pressure.

Table 23 presents four financial stability indicators for each LSA municipality and the Regional Municipality of Niagara. Current ratios, which measure the ability to meet short-term obligations, range from 3.5 to 4.3 across the LSA, well above the generally accepted minimum of 1.0 and indicating ample capacity to absorb near-term shifts in service demand. Debt service coverage ratios range from 4 in St. Catharines to 234 in Thorold against the provincial benchmark of 2.0, with the wide spread reflecting variation in outstanding debt loads; Niagara Falls records a ratio of 12 and Niagara-on-the-Lake 21, placing Niagara Falls well above the benchmark of 2.0. All four municipalities report positive operating surplus ratios, from 15.0% in St. Catharines to 63.2% in Thorold, showing consistent capacity to direct surplus revenues toward reserves, capital investment, and debt repayment. Asset consumption ratios remain below the 50% provincial threshold across the LSA, indicating that municipal infrastructure is generally in its first half of useful life. The Regional Municipality of Niagara meets all benchmarks but records weaker ratios on every indicator, with a current ratio of 1.4 reflecting more limited short-term flexibility, a debt service coverage ratio of 6 indicating a comparatively higher servicing burden, an operating surplus of 15.6% versus the LSA average of 36.0% suggesting reduced fiscal flexibility, and an asset consumption ratio of 44.4% placing regional infrastructure closer to mid-life than that of the LSA municipalities. These differences are consistent with the upper-tier government’s responsibility for cost-shared services and older, large-scale regional infrastructure.

Table 23: LSA and Niagara Region Financial Stability Metrics

Area	Current Ratio	Debt Service Coverage Ratio	Operating Surplus Ratio	Asset Consumption Ratio
Niagara Falls	4.3	12.0	34.9%	38.7%
Niagara-on-the-Lake	3.5	21.0	31.0%	36.1%
St. Catharines	4.0	4.0	15.0%	42.9%
Thorold	3.5	234.0	63.2%	29.5%
LSA	3.8	67.8	36.0%	36.8%
Niagara Region	1.4	6.0	15.6%	44.4%

Source: (Avaanz Ltd., 2026) (Ontario Ministry of Municipal Affairs and Housing, 2025a) (Ontario Ministry of Municipal Affairs and Housing, 2025b) (Ontario Ministry of Municipal Affairs and Housing, 2026a) (Ontario Ministry of Municipal Affairs and Housing, 2025c) (Ontario Ministry of Municipal Affairs and Housing, 2025d).

Note: The LSA ratios are calculated as the average of the four municipalities.

All municipalities in both study areas meet recognised benchmarks across the four indicators assessed, with LSA municipalities recording consistently stronger ratios than the Regional Municipality of Niagara. Niagara Falls, the host municipality, records the strongest liquidity position in the LSA and exceeds provincial benchmarks on all four measures, while the Region's weaker ratios are consistent with its role as the upper-tier government responsible for cost-shared services and large-scale regional infrastructure. Together with the tax base and revenue conditions documented above, these indicators complete the public finance baseline.

4.4.6 Tangible Capital Assets

Tax base composition, revenue structure, and financial performance collectively describe the fiscal capacity of each municipality. Tangible capital assets represent the physical infrastructure and facilities that municipalities own and maintain, and the rate at which new investment keeps pace with amortization indicates whether that infrastructure base is being sustained or eroded. This section presents the composition of municipal capital assets and the asset sustainability ratios that measure reinvestment against amortization, completing the infrastructure dimension of the public finance baseline.

Table 24 presents tangible capital assets for each LSA municipality and the Regional Municipality of Niagara, disaggregated into general capital assets, infrastructure, and construction in progress. Infrastructure dominates the asset base across all four LSA municipalities, accounting for between 52.6% of assets in St. Catharines and 79.3% in Thorold, with Niagara Falls at 72.3%. The variation reflects differences in each municipality's built form. St. Catharines carries a larger share of general capital assets (42.4%), consistent with the building stock and equipment needs of the largest population centre in the LSA, while the remaining three municipalities are more heavily weighted toward linear infrastructure. Construction in progress is modest across the LSA at 2.5%

of total assets, compared with 12.5% for the Region, where ongoing regional infrastructure programs account for the larger share. At \$2.17 billion, the LSA's total asset base represents 87.5% of the upper-tier Niagara Region's \$2.48 billion in tangible capital assets, indicating that the four LSA municipalities collectively own a base of municipal infrastructure of comparable scale to that held by the upper-tier government.

Table 24: LSA and Niagara Region Tangible Capital Assets by Category, 2024 (\$ Millions)

Area	General		Infrastructure		Construction-in-progress		Total	
	\$	%	\$	%	\$	%	\$	%
Niagara Falls	\$240.9	27.0%	\$645.4	72.3%	\$6.7	0.8%	\$893.0	100.0%
Niagara-on-the-Lake	\$46.9	22.6%	\$156.6	75.6%	\$3.7	1.8%	\$207.2	100.0%
St. Catharines	\$354.0	42.4%	\$439.2	52.6%	\$41.6	5.0%	\$834.8	100.0%
Thorold	\$45.5	19.4%	\$186.3	79.3%	\$3.2	1.3%	\$235.0	100.0%
LSA	\$687.3	31.7%	\$1,427.4	65.8%	\$55.2	2.5%	\$2,169.9	100.0%
Niagara Region	\$542.7	21.9%	\$1,628.7	65.7%	\$308.8	12.5%	\$2,480.3	100.0%

Source: (Avaanz Ltd., 2026) (Ontario Ministry of Municipal Affairs and Housing, 2025a) (Ontario Ministry of Municipal Affairs and Housing, 2025b) (Ontario Ministry of Municipal Affairs and Housing, 2026a) (Ontario Ministry of Municipal Affairs and Housing, 2025c) (Ontario Ministry of Municipal Affairs and Housing, 2025d).

Table 25 presents capital investment, amortization, and the resulting asset sustainability ratio for each LSA municipality and Niagara Region. The asset sustainability ratio measures annual capital additions and betterments against annual amortization. A ratio above 100% indicates that a municipality is investing in its capital base faster than it is being amortized. Three of the four LSA municipalities exceed this threshold by a wide margin, with Thorold at 673.5% reflecting a period of concentrated capital investment, and Niagara Falls and Niagara-on-the-Lake recording ratios of 171.3% and 178.5% respectively. St. Catharines is the exception at 60.4%, where annual amortization of \$30.4 million exceeds capital additions of \$18.4 million, indicating that its asset base is amortizing faster than it is being renewed in the current reporting year. The LSA average of 181.7% is pulled upward by Thorold's outlier ratio but remains above 100 percent even without it. Niagara Region records a ratio of 248.6%, consistent with the Region's active capital program visible in its construction-in-progress share. These ratios indicate whether each municipality is sustaining its infrastructure base at a rate sufficient to keep pace with amortization.

Table 25: LSA and Niagara Region Capital Investment, Amortization, and Asset Sustainability Ratio, 2024 (\$ Millions)

Area	Total Capital Assets - Additions and Betterments	Amortization of Tangible Capital Assets	Asset Sustainability Ratio
Niagara Falls	\$49.4	\$28.8	171.3%
Niagara-on-the-Lake	\$12.4	\$6.9	178.5%
St. Catharines	\$18.4	\$30.4	60.4%
Thorold	\$54.8	\$8.1	673.5%
LSA	\$135.0	\$74.3	181.7%
Niagara Region	\$299.3	\$120.4	248.6%

Source: (Avaanz Ltd., 2026) (Ontario Ministry of Municipal Affairs and Housing, 2025a) (Ontario Ministry of Municipal Affairs and Housing, 2025b) (Ontario Ministry of Municipal Affairs and Housing, 2026a) (Ontario Ministry of Municipal Affairs and Housing, 2025c) (Ontario Ministry of Municipal Affairs and Housing, 2025d).

Note: LSA values may not equal the sum of individual community values due to rounding.

Infrastructure accounts for the majority of municipal assets across both study areas, and most LSA municipalities are reinvesting at rates that exceed amortization. Niagara Falls maintains an asset sustainability ratio of 171.3% and carries the largest infrastructure asset base in the LSA at \$645 million, indicating that reinvestment in the host municipality's infrastructure exceeds amortization. St. Catharines' below-threshold ratio is the only result below 100% in either study area but does not alter the overall pattern of sustained capital reinvestment across the LSA. These asset conditions, together with the financial performance metrics documented in the preceding section, complete the description of municipal infrastructure and fiscal capacity across the LSA and RSA.

4.4.7 Environmental Services and Waste Management Costs

Environmental services, as reported in municipal FIRs, encompass water, wastewater, stormwater, and solid waste services. In Niagara's two-tier system, solid waste collection, disposal, and diversion are regional upper-tier responsibilities; the lower-tier expenditures are composed almost entirely of water and wastewater operations.

Table 26 presents environmental services expenditures alongside total operating expenses for each LSA municipality and the Regional Municipality of Niagara in 2024. Niagara Region's total environmental services expenditure of \$172.2 million includes \$16.6 million allocated directly to solid waste disposal and \$57.5 million for wastewater treatment and disposal, where Walker's leachate is ultimately processed (Ontario Ministry of Municipal Affairs and Housing, 2025o). Together, solid waste and wastewater treatment account for \$104.8 million of the Region's environmental services budget, and both are directly relevant to the project.

Table 26: LSA and Niagara Region Environmental Services Compared to Other Operating Expenses, 2024 (\$ Millions)

Area	Environment		Other		Total	
	\$	%	\$	%	\$	%
Niagara Falls	63.7	30.8%	143.3	69.2%	207.0	100.0%
Niagara-on-the-Lake	14.5	31.8%	31.1	68.2%	45.5	100.0%
St. Catharines	61.0	26.4%	170.4	73.6%	231.5	100.0%
Thorold	15.0	28.7%	37.4	71.3%	52.4	100.0%
LSA	154.1	28.7%	382.2	71.3%	536.3	100.0%
Niagara	172.2	12.9%	1,161.4	87.1%	1,333.7	100.0%

Source: (Avaanz Ltd., 2026) (Ontario Ministry of Municipal Affairs and Housing, 2025a) (Ontario Ministry of Municipal Affairs and Housing, 2025b) (Ontario Ministry of Municipal Affairs and Housing, 2026a) (Ontario Ministry of Municipal Affairs and Housing, 2025c) (Ontario Ministry of Municipal Affairs and Housing, 2025d).

Note: LSA values may not equal the sum of individual community values due to rounding.

Beyond the aggregate expenditure figures, a specific financial relationship connects landfill operations to the municipal wastewater system. Walker’s existing South Landfill generates leachate that is collected on-site and discharged to the municipal sanitary sewer under an existing agreement with the Town of Niagara-on-the-Lake. Leachate conveyed through Niagara-on-the-Lake’s collection system is treated at the Port Weller Wastewater Treatment Plant, operated by the Niagara Region.

Walker discharges an average of 350,000 cubic metres of leachate annually into Niagara-on-the-Lake’s sanitary sewer system at the Town’s standard wastewater rate, currently \$1.72 per cubic metre (Town of Niagara-on-the-Lake, 2025). At current volumes, this arrangement generates approximately \$600,000 in annual revenue for the Town, equivalent to roughly 4.1% of Niagara-on-the-Lake’s total user fee revenue as reported in the 2024 Financial Information Return.

Because solid waste collection, disposal, and diversion are regional responsibilities, the project’s fiscal effects on waste management would register primarily at the Niagara Region level. The leachate discharge arrangement with Niagara-on-the-Lake represents the one direct lower-tier financial connection to landfill operations. These expenditure and revenue relationships describe how waste management is financed across the two-tier system, but current funding does not fully cover the cost of the service.

The full-cost-recovery rate for waste disposal is estimated at \$181 per tonne, approximately \$53 above the current tipping fee, requiring the Region to subsidize roughly 29% of disposal operating costs through the municipal tax levy (Niagara Region, 2024). The Region funds waste management through a combination of direct user fees, tax levies charged back to the twelve lower-tier municipalities, and limited producer responsibility funding (Niagara Region, 2023). The

landfill liability reserve is substantially underfunded. The full liability stands at \$129.7 million (2023) against a reserve balance of \$5.5 million (Niagara Region, 2023).

Together, the regional waste management budget, the leachate discharge revenue to Niagara-on-the-Lake, and the shortfall between disposal costs and tipping fee recovery describe the fiscal structure of waste management across the two-tier system within which the project would operate.

4.4.8 Infrastructure Funding Gaps

Asset management plans quantify the gap between planned infrastructure investment and available funding across the study areas. The four LSA municipalities collectively report annual infrastructure funding gaps totalling approximately \$54 to \$55 million (City of Niagara Falls, 2025) (City St Catharines, 2025) (City of Thorold, 2025) (Town of Niagara-on-the-Lake). At the Regional level, the Niagara Region's 2025 Corporate Asset Management Plan identifies an annual funding gap of \$391.8 million against a total asset portfolio of \$12.1 billion, with a deferred capital backlog of \$2.8 billion (Niagara Region, 2025b). Within this portfolio, waste management assets valued at \$111.7 million are in comparatively strong condition, with 90.7% rated good or better (Niagara Region, 2025b).

4.5 Cost of Services

This section describes the waste disposal facilities and cost of services conditions in the Niagara Region and the Province. These conditions establish the baseline against which the project's effects on cost of services will be assessed.

4.5.1 Ontario Waste Disposal

Ontario generated approximately 16.88 million tonnes of waste in 2024, of which 12.75 million tonnes were disposed in landfills (Waste to Resource Ontario, 2025). Of this total, approximately 73 percent (9.31 million tonnes) was managed at Ontario landfills, while 27 percent (3.44 million tonnes) was exported to landfills in the United States (Waste to Resource Ontario, 2025). In 2021, Of the waste exported, over 90 percent was directed to Michigan with the balance to New York, and small percent to Ohio (AMO, 2023). Export levels have remained consistent since 2021, though continued reliance on cross-border disposal poses risks in the face of potential trade or regulatory shifts.

The province holds an estimated 125.61 million tonnes of approved remaining landfill capacity as of 2024, with private landfills accounting for 50.5 percent (Waste to Resource Ontario, 2025). This share reflects a growing reliance on private operators as municipalities face land constraints and seek cost efficiencies. Nearly half of remaining capacity within three to four hours of Southern Ontario's population base is concentrated in Southwestern Ontario, supplemented by capacity in the GTA and Niagara-Hamilton corridor. Seven landfills, including Walker's South Landfill, account for 51 percent of the province's total remaining capacity (Waste to Resource Ontario, 2025).

Several Ontario municipalities are not replacing their depleting landfill capacity and are increasingly depending on private operators, while private landfills are operating at or near their annual capacity year after year. At current disposal rates and assuming continued export of approximately 3.44 million tonnes annually to US landfills, Ontario's domestic landfill capacity is projected to be depleted by approximately 2037; if cross-border exports were curtailed, this timeline shortens to approximately 2034. These provincial conditions frame the waste disposal context within which the Niagara Region's landfill infrastructure operates.

4.5.2 Regional Landfills

Three operational landfills accepting municipal solid waste are located in the RSA: Humberstone in Welland, Niagara Road 12 in West Lincoln, and Walker's South Landfill in Niagara Falls. Humberstone and Niagara Road 12 are owned and operated by Niagara Region. Humberstone Road Landfill has a maximum approved capacity of 4.6 million m³ and is permitted to receive and dispose 700 tonnes per day of non-hazardous waste generated within the boundaries of the Region. As of January 2023, approximately 46% of its overall capacity had been used (GHD, 2024a). Niagara Road 12 Landfill has a total approved capacity of 1.851 million m³ and is approved for disposal of 136 tonnes per day of waste generated within Grimsby, Lincoln, Pelham, and West Lincoln. As of January 2023, approximately 50% of its capacity had been used (GHD, 2024a).

Walker's South Landfill has been operating since 2009 under ECA No. 0084-78RKAM with a total approved site capacity of 17.7 million m³. The facility is approved to receive an annual fill of 1.1 million tonnes, comprising 850,000 tonnes of residual waste and 250,000 tonnes of soil for daily and interim cover. The approved service area encompasses the Province of Ontario. The South Landfill (Phase 1) is projected to reach capacity between 2029 and 2031 (Walker, 2024c).

Niagara Region has a partnership agreement with Walker Environmental Group for the disposal of curbside-collected waste from St. Catharines, Thorold, Niagara-on-the-Lake, and select collection routes in Niagara Falls at Walker's Thorold landfill. The agreement also includes residential self-hauled waste received at Walker's drop-off depot. The maximum annual allowance dedicated to the Region under this agreement is 100,000 tonnes (GHD, 2024a).

In total, Walker's South Landfill receives approximately 439,250 tonnes of solid, non-hazardous waste annually from within the Niagara Region, comprising approximately 39,250 tonnes of residential waste from the Region and lower tier municipalities, and approximately 400,000 tonnes from IC&I customers. This combined volume represents approximately 74% of all waste generated within the Region. The Region's own municipal landfills handle approximately 13%, and the remaining 13% is exported to landfills in the United States (GHD, 2024b).

Excluding IC&I waste received at the South Landfill, approximately 100,824 tonnes of regionally generated garbage was managed across the three active landfills in 2022, with Walker handling 42.8%. The distribution of this waste by source is presented in **Table 27**.

Table 27: Regionally Generated Garbage Capture by Landfill, 2022

Landfill	Curbside		Self-Hauled		Total Garbage	
	T	%	T	%	T	%
Humberstone Road	16,758	27.0%	26,777	68.9%	43,535	43.2%
Niagara Road 12	8,862	14.3%	5,297	13.6%	14,159	14.0%
Walker South Landfill	36,348	58.7%	6,782	17.5%	43,130	42.8%
Total	61,968	100.0%	38,856	100.0%	100,824	100.0%

Source: (GHD, 2024a), (Avaanz Ltd., 2026a).

4.5.3 Disposal Pricing

Niagara Region currently charges a gate rate of \$128 per tonne for garbage and construction and demolition materials at its landfill sites, the posted per-tonne tipping fee that applies to all customers who deliver waste directly (Niagara Region, 2026). At \$128 per tonne, the Region’s rate is near the \$125.40 public-sector municipal average for neighbouring municipalities, within a range of \$75 to \$194 (Niagara Region, 2024). The Region reviews its landfill tipping fee rates annually with the goal of full cost recovery (GHD, 2024a). Walker Environmental Group charges a comparable gate rate of \$130.55 per tonne including HST for household waste at its Thorold drop-off depot (Walker, 2026).

These gate rates apply to small-load and residential customers. For IC&I generators, which account for the majority of Walker’s waste received, disposal is priced through individually negotiated bulk contracts. Although Ontario private-sector bulk rates are not publicly disclosed, published fee schedules at public-sector landfills provide an indication of the range. The Essex-Windsor Solid Waste Authority offers volume-tiered IC&I rates from \$63 to \$47 per tonne on a put-or-pay basis for accounts of 1,001 to 30,001+ tonnes (Essex-Windsor Solid Waste Authority, 2025), and the City of London charges \$47 per tonne on bulk accounts with a minimum vehicle tare weight of 10 tonnes (City of London, 2025).

Private-sector bulk IC&I rates in Ontario are shaped by competition with cross-border disposal options in Michigan. Tipping fees at Michigan facilities that receive Canadian waste are in the range of \$16 to \$17 USD per ton, or \$24 to \$25 CAD per tonne at current exchange rates (Grosse Pointe Times, 2022) (University of Michigan - Waste Management Services, 2025) (Kimball Township, 2023). Ontario operators within proximity of Michigan take into consideration cross-border facility tipping fees plus haulage (~\$200/hr) and Blue Water Bridge tolls (Federal Bridge Corporation, 2026) (Michigan Department of Transportation, 2026) in determining pricing. Accounting for these factors, tipping fees at facilities within proximity of the Michigan border such as Twin Creeks Environmental Centre in Warwick Township, Lambton County and Ridge Landfill in Blenheim, Chatham-Kent are estimated to be in the range of roughly \$39 to \$45 per tonne.

New York State offers a second cross-border alternative. Modern Landfill in Niagara County, operated by Modern Corporation, is located approximately 26 kilometres from the South Landfill and received approximately 164,000 tons of Canadian waste in 2024, comprising mixed municipal solid waste and industrial waste (Modern Landfill, Inc., 2025). Modern Disposal holds the current New York State Office of General Services procurement contract for solid waste services at a rate of \$59.69 USD per ton, or approximately \$92 CAD per tonne at the 2025 Bank of Canada annual average exchange rate (New York State Office of General Services, 2026). At that rate, the New York alternative is substantially more expensive than Michigan on a tipping-fee basis but closer in proximity. Disposal in New York State also requires crossing the Lewiston–Queenston Bridge, which charges a westbound commercial truck toll on return to Canada (Niagara Falls Bridge Commission, 2025).

Modern's remaining constructed capacity is approximately one year, with an additional 1.25 million cubic yards of permitted but unbuilt airspace (Modern Landfill, Inc., 2025). These capacity constraints are relevant to the assessment because they define the near-term availability of the nearest cross-border disposal option.

IC&I disposal costs also depend partly on whether waste can be delivered to the destination landfill directly or must first be consolidated at a transfer station. Where the destination landfill is local, collection vehicles can be unloaded directly at the site. The South Landfill accepts direct delivery from lugger trucks, roll-off trucks, front-end trucks, as well as transfer trailers under documented waste-unloading procedures (Walker, 2009). Out-of-region disposal, by contrast, typically requires consolidation of collection loads through a transfer station before long-haul transport to the destination landfill, adding a cost that is not part of in-region disposal. Transfer-station drop-and-load fees are approximately \$15.75 per tonne (City of Toronto, 2025).

The disposal pricing baseline establishes the conditions against which the effects of the proposed undertaking on customer cost of waste services will be assessed. Residents pay Council-set gate rates at Regional public landfills, while IC&I generators pay negotiated bulk rates shaped by competition among Ontario private landfills and cross-border facilities.

5. Conclusions

This report sets out the role of Walker and the South Landfill in the economic conditions of the LSA and RSA. Walker's contributions are documented across employment, procurement, municipal revenue, and waste management capacity, while the long-term changes in the LSA's farm, tourism, and real-estate markets are not attributed to landfill operations. The South Landfill is a significant component of the regional waste management system.

At least nine near-neighbour businesses have operated alongside Walker since the 2005 Phase 1 EA, with several established before 1985 (Gauld Nurseries, Rankin Construction, the General Motors St. Catharines Propulsion Plant, and Beechwood Golf & Social House). Other long-tenured near-neighbour operators include Boondocks Pet Resort, Royal Niagara Golf Club, Thorold Automotive Solutions (1982), and Regency Athletic Resort (in place since the 1960s). In the broader LSA, tourism-related operators White Oaks Conference Resort and Spa (1978) and the Inn at Lock Seven (1965) have also operated alongside Walker for decades. Of the operators interviewed for this assessment, odour was reported by multiple businesses but no operators indicated the odour was a cause of revenue loss; although one operator noted occasional past concerns regarding effects of odour on outdoor activities. Since the South Landfill commenced operations in 2009, six additional businesses have chosen to locate in the NNA. The continuity of long-tenured businesses and continued new establishment indicate that landfill proximity has not been a barrier to commercial activity in the NNA.

The South Landfill contributes to the LSA and RSA economy through direct employment of 16 full-time Walker staff residing in the Niagara Region, and through external procurement engaging 129 suppliers, of which 54 (42%) are based in the LSA and 66 (51%) within the broader Niagara Region, together accounting for approximately 76% and 77% of that procurement expenditure, respectively. Agriculture has historically been a significant LSA sector but has contracted, with farm sector employment falling 19.3% between 2018 and 2024 in a sector consolidating toward fewer, larger operations. Tourism remains a significant regional sector, generating approximately \$3.0 billion in 2023 LSA sales (70% of the RSA total), although LSA tourism employment fell 31.4% between 2018 and 2024 against a 20.1% RSA decline. Trends in farms and tourism predate the proposed undertaking, and neither has been attributed to landfill operations.

The LSA and RSA real-estate markets moved through a complete cycle over the baseline period, with detached-home prices appreciating to a 2022 peak before correcting through 2023 and softening further through 2025. Both geographies tracked the Ontario-wide pattern. CMHC, the Niagara Association of REALTORS®, Central 1 Credit Union, and the Bank of Canada monetary policy record each attribute the cycle to interest-rate conditions, GTA-out migration, and affordability pressures. Real estate professionals interviewed for the assessment gave similar attributions, citing affordability pressure and broader economic uncertainty.

LSA and RSA municipalities are financially stable, with diverse revenue sources and strong tax bases, and all meet provincial benchmarks on liquidity, debt service coverage, operating surplus, and asset consumption. Walker's operations contribute to municipal finances through environmental services and revenue streams. The leachate-discharge arrangement with Niagara-

on-the-Lake generates approximately \$600,000 per year in user-fee revenue for the Town (about 4.1% of Town user-fee revenue), and the landfill property class carries the highest tax ratio in the Region. Proximity to the landfill enables cost efficiencies and supports sustainable infrastructure investment without negatively impacting the fiscal health of these communities.

RSA customers have access to disposal capacity within the Region through Walker's South Landfill, which currently receives approximately 74% of all waste generated within the Niagara Region (439,250 tonnes annually), comprising both IC&I and a portion of residential waste. The Region's own municipal landfills handle approximately 13% and a further 13% is exported to landfills in the United States. By providing in-region capacity, the South Landfill reduces haulage distances for residential and IC&I generators and offers cost-competitive disposal relative to alternatives, which are constrained by haulage costs, bridge tolls, and limited remaining capacity.

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Appendix A

Business Database

Walker South Landfill Phase 2 Environmental Assessment



Table A-1: Business Directory within the Local Study Area

#	Business Name	Type of Business	Address	Municipality	Study Area	Home Business
1	General Motors (GM) St. Catharines Propulsion Plant	Engine & transmission manufacturing	570 Glendale Ave, St. Catharines, ON L2R 7B3	St. Catharines	NNA	
2	SpencerARL	Third-party logistics (within the GM plant)	570 Glendale Ave, St. Catharines, ON L2R 7B3	St. Catharines	NNA	
3	Royal Niagara Golf Club	Golf course (27-hole public course)	1 Niagara-on-the-Green Blvd, Niagara-on-the-Lake, ON L0S 1J0	Niagara-on-the-Lake	NNA	
4	Gauld Nurseries	Garden centre & nursery	8865 Mountain Rd, Niagara Falls, ON L2E 6S4	Niagara Falls	NNA	
5	Perridiso Estate Winery	Winery	176 Warner Rd, Niagara-on-the-Lake, ON L0S 1J0	Niagara-on-the-Lake	NNA	
6	Regency Athletic Resort	Recreation & event venue	8068 Mountain Rd, Niagara Falls, ON L2E 6S4	Niagara Falls	NNA	
7	Circle K	Gas station & convenience store	8267 Thorold Stone Rd, Niagara Falls, ON L2H 1A7	Niagara Falls	NNA	
8	Pete's Pizza	Pizza / food service	8278 Thorold Stone Rd, Niagara Falls, ON L2H 1A9	Niagara Falls	NNA	
9	Green Island Restaurant	Restaurant	8278 Thorold Stone Rd, Niagara Falls, ON L2H 1A9	Niagara Falls	NNA	
10	Skelding G Landscaping	Landscaper	4063 Kalar Rd, Niagara Falls, ON L2H 1S7	Niagara Falls	NNA	
11	SilverLine Group Inc.	Construction & residential development	1051 Old Thorold Stone Rd, Thorold, ON L2V 3Y5	Thorold	NNA	
12	Element Landscape Services Inc.	Landscaping (service yard)	1040 Old Thorold Stone Rd, Thorold, ON L2V 3Y5	Thorold	NNA	
13	Niagara Ready Mix	Ready-mix concrete supplier	1134 Old Thorold Stone Rd, Thorold, ON L2V 3Y5	Thorold	NNA	
14	Petro-Canada	Gas station & convenience store	1040 Thorold Stone Rd, Thorold, ON L0S 1A0	Thorold	NNA	
15	Tim Hortons	Coffee shop	1040 Thorold Stone Rd, Thorold, ON L2E 6S4	Thorold	NNA	
16	Broad Street Cheesesteaks	Food truck	3393 Thorold Townline Rd, Thorold, ON L0S	Thorold	NNA	
17	Boondocks Pet Resort	Pet boarding & daycare	10056 Thorold Stone Rd, Niagara Falls, ON L2E 6S4	Niagara Falls	NNA	
18	Rankin Construction - Thorold Asphalt	Hot-mix asphalt manufacturing	3299 Thorold Townline Rd, Thorold, ON L0S 1A0	Thorold	NNA	
19	Beechwood Golf & Social House	Golf course & banquet facility	4680 Thorold Townline Rd, Niagara Falls, ON L2E 6S4	Niagara Falls	NNA	
20	Thorold Automotive Solutions	Auto parts & vehicle recycling	1108 Beaverdams Rd, Thorold, ON L2V 3Y7	Thorold	NNA	
21	Impression Recording Studio	Recording studio	8108 Mt Carmel Blvd, Niagara Falls, ON L2H 2Y8	Niagara Falls	NNA	✓
22	Mitchell Contracting	General contractor	3932 Garner Rd, Niagara Falls, ON L2H 0S4	Niagara Falls	NNA	✓
23	Rancho Hermoza Tree Service & Lot Clearing	Tree service	8972 Thorold Stone Rd, Niagara Falls, ON L2H 0V7	Niagara Falls	NNA	✓
24	Great Lakes Contractors	Excavating contractor	92 Warner Rd, Niagara-on-the-Lake, ON L0S 1J0	Niagara-on-the-Lake	NNA	✓
25	Ruskcast	Manufacturer	110 Ormond St S, Thorold, ON L2V 4J6	Thorold	LSA	

#	Business Name	Type of Business	Address	Municipality	Study Area	Home Business
26	Broz Motors CAR - RENTALS	Car rental agency	112 Ormond St S, Unit 3, Thorold, ON L2V 3Y1	Thorold	LSA	
27	Impact Promotions	Signs, vehicle wraps, fabrication	112 Ormond St S, Thorold, ON L2V 3Y1	Thorold	LSA	
28	Rosemore Electric Inc.	Electrician	112 Ormond St S, Unit 2, Thorold, ON L2V 3Y1	Thorold	LSA	
29	Lakeside Electrical	Electrical installation service	106 Ormond St S, Thorold, ON L2V 3W1	Thorold	LSA	
30	Johnny Rag	Industrial equipment supplier	4 Industrial Dr, Thorold, ON L2V 3Y9	Thorold	LSA	
31	Tempest Auto	Auto repair shop	309 Ormond St S, Thorold, ON L2V 3Y1	Thorold	LSA	
32	GMC Detailing & Car Care	Car detailing service	106 Ormond St S, Thorold, ON L2V 2Y6	Thorold	LSA	
33	Dan Giancola's bto Performance	Gym/Physical Fitness Center	106 Ormond St S, Thorold, ON L2V 2Y6	Thorold	LSA	
34	Cecchini Masonry Ltd	Masonry contractor	2 Industrial Dr, Thorold, ON L2V 3Y7	Thorold	LSA	
35	iPoly inc	Manufacturer	100 Ormond St S, Thorold, ON L2V 1Y5	Thorold	LSA	
36	Burnstein Brick Sto Distributor	Construction material wholesaler	95 Ormond St S, Thorold, ON L2V 3G2	Thorold	LSA	
37	Auto Shine Team Mobile Car Detailing of Thorold	Car detailing service	3 Richmond St, Thorold, ON L2V 3G2	Thorold	LSA	
38	Brians Tire Repairs Inc.	Tire repair shop	11 Richmond St, Thorold, ON L2V 3G2	Thorold	LSA	
39	Hartzel Marine & Auto Service	Boat repair shop	96 Ormond St S, Thorold, ON, L2V 4V6	Thorold	LSA	
40	Club Capri	Banquet hall	36 Cleveland St, Thorold, ON L2V 3K4	Thorold	LSA	
41	Beer Store 4213	Beverage store	78 Ormond St S, Thorold, ON L2V 3Y9	Thorold	LSA	
42	McDonald's	Fast food restaurant	10 Sullivan Ave, Thorold, ON L2V 2Y2	Thorold	LSA	
43	Greg's TV & Video	Television repair service	33 Pine St S, Thorold, ON L2V 3L1	Thorold	LSA	
44	MOTORAMA	Used car dealer	Ormond St S, Thorold, ON L2V 1Y5	Thorold	LSA	
45	Haine Funeral Home & Chapel	Funeral home	26 Ormond St S, Thorold, ON L2V 1Y4	Thorold	LSA	
46	7-Eleven	Convenience store	17 Clairmont St. @ Ormand, Thorold, ON L2V 1R2	Thorold	LSA	
47	Cardiology Associated of Niagara	Cardiologist	35 Albert St W, Thorold, ON L2V 3L1	Thorold	LSA	
48	Thorold Orthopaedic Institute	Physiotherapist	35 Albert St W 2nd Floor, Thorold, ON L2V 3L1	Thorold	LSA	
49	H&R Block	Tax preparation service	29 Albert St W, Thorold, ON L2V 2G2	Thorold	LSA	
50	Thorold Veterinary Hospital	Veterinarian	4 Pine St N, Thorold, ON L2V 2N9	Thorold	LSA	
51	Be You tiful Hair Salon	Hairdresser	33 Pine St S, Thorold, ON L2V 3L1	Thorold	LSA	
52	Salon 98	Hairdresser	29 Pine St S Unit 2, Thorold, ON L2V 3L1	Thorold	LSA	

#	Business Name	Type of Business	Address	Municipality	Study Area	Home Business
53	John's Meat Shop	Butcher shop	28 Pine St S, Thorold, ON L2V 3L2	Thorold	LSA	
54	Hewitt Dentistry	Dentist	18 Pine St S, Thorold, ON L2V 3L2	Thorold	LSA	
55	Dentistry in Thorold	Dentist	15 Albert St W, Thorold, ON L2V 2G2	Thorold	LSA	
56	Ramco	Screen printer	11 Towpath Street, Thorold, ON L2V 2P5	Thorold	LSA	
57	Contagious Beauty Salon	Beauty salon	11 Towpath Street, Thorold, ON L2V 2P5	Thorold	LSA	
58	Otolaryngology Head and Neck Surgery	ENT & Facial Surgery	15 Towpath St., Unit 1	Thorold	LSA	
59	Hearing Life	Hearing aid store	15 Towpath Street Unit 2, Thorold, ON L2V 2P5	Thorold	LSA	
60	The Inn at Lock Seven	2-star hotel	24 Chapel St S, Thorold, ON L2V 2C6	Thorold	LSA	
61	Thorold Community Credit Union	Credit union	63 Front St S, Thorold, ON L2V 0A7	Thorold	LSA	
62	Thorold Family Dental	Dentist	4 Sullivan Ave, Thorold, ON L2V 2X9	Thorold	LSA	
63	Print Three Thorold	Digital printing service	2B Sullivan Ave, Thorold, ON L2V 2X9	Thorold	LSA	
64	Papa Vince Pizza	Pizza takeaway	2 Sullivan Ave, Thorold, ON L2V 2X9	Thorold	LSA	
65	Walk-in cuts by Sonia	Barber shop	2 Sullivan Ave, Thorold, ON L2V 2X9	Thorold	LSA	
66	The Moose and Goose	Bar	54 Paul De Divitiis Senior Way, Thorold, ON L2V 1X1	Thorold	LSA	
67	Smilee Dental Centre	Dental clinic	52 Front St S, Thorold, ON L2V 1W9	Thorold	LSA	
68	Donnelly's Pub	Irish pub	54 Front St S, Thorold, ON L2V 1X1	Thorold	LSA	
69	Pharmaviva Pharmacy	Pharmacy	6 Clairmont St, Thorold, ON L2V 1R1	Thorold	LSA	
70	Fascination Dance Studio	Dance school	6 Clairmont St, Thorold, ON L2V 1R1	Thorold	LSA	
71	Peace Medical Clinic Family Practice	Doctor	6 Clairmont St, Thorold, ON L2V 1R1	Thorold	LSA	
72	Jurmain Law Office	Law firm	8A Clairmont St, Thorold, ON L2V 1R1	Thorold	LSA	
73	The Pampered Peach Body Sugaring	Beauty salon	8 Clairmont St, Thorold, ON L2V 1R1	Thorold	LSA	
74	Gibson Driver Education	Driving school	8 Clairmont St Unit 2, Thorold, ON L2V 1R1	Thorold	LSA	
75	Subway	Sandwich shop	8 Clairmont St, Thorold, ON L2V 1R1	Thorold	LSA	
76	Pho 18	Asian restaurant	18 Clairmont St, Thorold, ON L2V 1R1	Thorold	LSA	
77	Mario's Barber Shop	Barber shop	61 Front St S, Thorold, ON L2V 1W8	Thorold	LSA	
78	Da Bomb Bath co.	Cosmetics store	59 Front St S, Thorold, ON L2V 0A7	Thorold	LSA	
79	Low Quantity Sneakers & Apparel	retail store	57 Front St S, Thorold, ON L2V 1W8, CA	Thorold	LSA	

#	Business Name	Type of Business	Address	Municipality	Study Area	Home Business
80	Whisk Cafe by Avo & Co.	Café	51 Front St S, Thorold, ON L2V 1W8	Thorold	LSA	
81	Tehachapi Breast Implant Clinic	Medical Center	48 Front St S, Thorold, ON L2V 4B3	Thorold	LSA	
82	The Red Door	Women's clothing store	45 Front St S, Thorold, ON L2V 1W8	Thorold	LSA	
83	TRU Beauty Collective	Beauty salon	37 Front St S, Thorold, ON L2V 1W8	Thorold	LSA	
84	JC Patisserie	Pastry shop	33 Front St S, Thorold, ON L2V 1W8	Thorold	LSA	
85	Thorold Family Medical Centre	Family practice physician	21 Front St S, Thorold, ON L2V 1W8	Thorold	LSA	
86	C4 Tattoo	Tattoo and piercing shop	21 Front St S, Thorold, ON L2V 1W8	Thorold	LSA	
87	Pharmasave Henderson's	Pharmacy	15 Front St S, Thorold, ON L2V 1W8	Thorold	LSA	
88	Goldhawk Accounting & Tax Services	Accounting firm	7 Front St S, Thorold, ON L2V 1W8	Thorold	LSA	
89	Coatesy's Kitchen	Takeout Restaurant	50 A Front St S, Thorold, ON L2V 1W9	Thorold	LSA	
90	Carbon Salon	Beauty salon	36 Front St S, Thorold, ON L2V 1W9	Thorold	LSA	
91	Impact Promotions Niagara	Promotional products supplier	32 Front St S, Thorold, ON L2V 1W9	Thorold	LSA	
92	Lynn's Grooming Salon	Pet groomer	39 Front St S, Thorold, ON L2V 1W8	Thorold	LSA	
93	Steadman Jewellers	Jeweler	29 Front St S, Thorold, ON L2V 1W8	Thorold	LSA	
94	Emeral Realty Group Ltd. Broker	Real Estate Agency	11 Front St S, Thorold, ON L2V 1W8	Thorold	LSA	
95	One Earth Thorold	Boutique	28 Front St S, Thorold, ON L2V 1W8	Thorold	LSA	
96	Chef and Bub	Restaurant	28 Front St S, Thorold, ON L2V 1W8	Thorold	LSA	
97	Hazel Market	Bakery	12 Albert St W, Thorold, ON L2V 1X3	Thorold	LSA	
98	Stage 1 Cuts	Barbershop in Thorold	13 Albert St W, Thorold, ON L2V 2G1	Thorold	LSA	
99	Rustic Roots Hair Lounge	Hair salon	11 Towpath Street, Thorold, ON L2V 2P5	Thorold	LSA	
100	The Old Fashioned Barbershop	Barbershop in Thorold	13A Albert St W, Thorold, ON L2V 1X3	Thorold	LSA	
101	lynrd Skynart Tattoos	Tattoo shop	9 Albert St W, Thorold, ON L2V 2G1	Thorold	LSA	
102	The Burgh	Hamburger restaurant	1 Albert St W, Thorold, ON L2V 1X9	Thorold	LSA	
103	Harry's New York Bar	Bar	1 Front St S, Thorold, ON L2V 1W8	Thorold	LSA	
104	RH Brows & Beauty Studio	Beauty salon	46B Front St S, Thorold, ON L2V 1W8	Thorold	LSA	
105	Rock & Roll Hair Studio	Hair salon	46A Front St S, Thorold, ON L2V 1W8	Thorold	LSA	
106	Figg Street Co.	Stationery store	40 Front St S, Thorold, ON L2V 1W9	Thorold	LSA	

#	Business Name	Type of Business	Address	Municipality	Study Area	Home Business
107	Creekview Floral Co.	Florist	30 Front St S, Thorold, ON L2V 1W9	Thorold	LSA	
108	Vanity Salon	Beauty salon	24 Front St S, Thorold, ON L2V 0A7	Thorold	LSA	
109	Yoga Centre of Niagara	Yoga studio	8 Carleton St S Lower Level, Thorold, ON L2V 5C2	Thorold	LSA	
110	Aesthetics By Alyssa	Facial spa	24 Front St S, Thorold, ON L2V 1W9	Thorold	LSA	
111	Aura Aesthetics & Wellness	Beauty salon	16 Front St S, Thorold, ON L2V 1W8	Thorold	LSA	
112	Front Street Laundromat	Laundry	10 Front St S, Thorold, ON L2V 1W8	Thorold	LSA	
113	MyoMove Massage Niagara	Massage therapist	10 Albert St E #101, Thorold, ON L2V 1P1	Thorold	LSA	
114	La Selva Law	Law firm	18 Albert St E, Thorold, ON L2V 1Y6	Thorold	LSA	
115	Dr Gerald Kandasamy	Doctor	24 Albert St E, Thorold, ON L2V 1P1	Thorold	LSA	
116	Pearl Hair Studio	Beauty salon	26 Albert St E, Thorold, ON L2V 1P1	Thorold	LSA	
117	Social Connection ABA Therapy	ABA Therapy, Mental Health Services, and Respite	1 Ormond St S, Thorold, ON L2V 1W8	Thorold	LSA	
118	EXP	Engineering consultant	28 Albert St E, Thorold, ON L2V 1P1	Thorold	LSA	
119	Office of Nick Dosa	Corporate office	18 Albert St E, Thorold, ON L2V 1P1	Thorold	LSA	
120	Niagara River Lions	Basketball club	10 Albert St E, Thorold, ON L2V 1P1	Thorold	LSA	
121	Chelsea Werner, RMT	Massage therapist	24 Front St S Rear Entrance, Thorold, ON L2V 0A7	Thorold	LSA	
122	Glow Skin Facials	Health and beauty shop	21 Front St S, Thorold, ON L2V 1W8	Thorold	LSA	
123	Sketchbook Comics and Games	Comic book store	3 Front St N, Thorold, ON L2V 1X3	Thorold	LSA	
124	Glow Hair Studio	Hairdresser	9 Front St N, Thorold, ON L2V 2E9	Thorold	LSA	
125	Padgett Business Services Thorold	Accountant	11 Front St N, Thorold, ON L2V 1X3	Thorold	LSA	
126	Birmingham Fire Control	Fire protection service	13 Front St N, Thorold, ON L2V 1X3	Thorold	LSA	
127	Front Variety	Variety store	16 Front St N, Thorold, ON L2V 1X4	Thorold	LSA	
128	Pretty Potions Apothecary	Metaphysical supply store	6 Front St N, Thorold, ON L2V 1X3	Thorold	LSA	
129	Sweet Celebrations Patisserie	Bakery	2 Front St N, Thorold, ON L2V 1X4	Thorold	LSA	
130	Vip Access Home Centre Inc.	Store	15 Front St N, Thorold, ON L2V 1X3	Thorold	LSA	
131	The Post Office - Shannon Passero	Women's clothing store	18 Front St N, Thorold, ON L2V 1X4	Thorold	LSA	
132	Penny's Kitchen Thorold	Restaurant	26 Front St N, Thorold, ON L2V 1X5	Thorold	LSA	
133	LEW'S pizza+wings+things	Pizza takeaway	32 Front St N, Thorold, ON L2V 1X3	Thorold	LSA	

#	Business Name	Type of Business	Address	Municipality	Study Area	Home Business
134	Bezo's Bar and Grill	Bar & grill	19 Front St N, Thorold, ON L2V 1X3	Thorold	LSA	
135	Taylor and Co. Salon	Hair salon	36 Front St N, Thorold, ON L2V 1X5	Thorold	LSA	
136	Castillo Shawarma	Restaurant	46 Front St N, Thorold, ON L2V 1X5	Thorold	LSA	
137	Glamour Nails and Spa	Nail salon	44 Front St N, Thorold, ON L2V 1X5	Thorold	LSA	
138	Prestige Barber Shop	Barber shop	50 Front St N, Thorold, ON L2V 1X5	Thorold	LSA	
139	Jo's Auto Collision and Towing	Auto body shop	54 Front St N, Thorold, ON L2V 1X5	Thorold	LSA	
140	Jay Kay & Co.	Hair salon	6 Front St N, Thorold, ON L2V 1X3	Thorold	LSA	
141	Griffiths Performance Physiotherapy	Physiotherapist	14 Front St N, Thorold, ON L2V 1X4	Thorold	LSA	
142	5 Star Mobile Pressure Wash	Pressure washing service	13 Front St N, Thorold, ON L2V 1X3	Thorold	LSA	
143	Rexall	Drug store	9 Pine St N #1a, Thorold, ON L2V 2P1	Thorold	LSA	
144	Manor Cleaners Ltd	Dry cleaner	9 Pine St N, Thorold, ON L2V 3Z9	Thorold	LSA	
145	The Water Source	Bottled water supplier	9 Pine St N, Thorold, ON L2V 4J6	Thorold	LSA	
146	Pet Valu	Pet supply store	9 Pine St N, Thorold, ON L2V 3Z9	Thorold	LSA	
147	Elio's Foot Comfort Centre	Foot care	9 Pine St N #8, Thorold, ON L2V 3Z9	Thorold	LSA	
148	BMO Bank of Montreal	Bank	9 Pine St N, Thorold, ON L2V 3Z9	Thorold	LSA	
149	Quitters Thorold	Vaporizer store	9 Pine St N #5, Thorold, ON L2V 3Z9	Thorold	LSA	
150	Buck or Two Plus	Discount store	Shopping Center, 9 Pine St N unit 3, Thorold, ON L2V 3Z9	Thorold	LSA	
151	Foodland Thorold	Supermarket	9 Pine St N, Thorold, ON L2V 3Z9	Thorold	LSA	
152	FirstOntario Credit Union	Credit union	9 Pine St N Unit 36, Thorold, ON L2V 3Z9	Thorold	LSA	
153	Pizza Lounge	Restaurant	9 Pine St N Unit-6, Thorold, ON L2V 3Z0	Thorold	LSA	
154	Lucy Popoli Professional Corporation CPA	Certified public accountant	9 Pine St N Unit 35, Thorold, ON L2V 3Z9	Thorold	LSA	
155	Meltwich Food Co	Restaurant	9 Pine St N Unit 34, Thorold, ON L2V 3Z9	Thorold	LSA	
156	barBURRITO	Tex-Mex restaurant	9 Pine St N #33, Thorold, ON L2V 3Z9	Thorold	LSA	
157	Mike's Music	Musical instrument store	9 Pine St N, Thorold, ON L2V 3Z9	Thorold	LSA	
158	Studio Nails	Nail salon	9 Pine St N, Thorold, ON L2V 2J2	Thorold	LSA	
159	Thorold Laundry	Laundry service	9 Pine St N Unit 31, Thorold, ON L2V 3Z9	Thorold	LSA	
160	Take Off Cannabis	Cannabis store	9 Pine St N, Thorold, ON L2V 4J6	Thorold	LSA	

#	Business Name	Type of Business	Address	Municipality	Study Area	Home Business
161	Welland Mills	Corporate office	20 Pine St N, Thorold, ON L2V 3L2	Thorold	LSA	
162	Driscoll Chiropractic Care Clinic	Chiropractor	20 Pine St N unit c1, Thorold, ON L2V 0A1	Thorold	LSA	
163	Lifemark Physiotherapy Thorold	Physiotherapist	20 Pine St N Unit C, Thorold, ON L2V 0A1	Thorold	LSA	
164	Book Depot Inc.	Warehouse	67 Front St N, Thorold, ON L2V 1X3	Thorold	LSA	
165	Mike's Auto Service	Auto repair shop	11 St David's, St David St W, Thorold, ON L2V 2L1	Thorold	LSA	
166	Bocchinfuso Funeral Home	Funeral home	2 Regent St, Thorold, ON L2V 1T1	Thorold	LSA	
167	Tim Hortons	Coffee shop	35 Ormond St N, Thorold, ON L2V 1Y9	Thorold	LSA	
168	Canal City Realty Ltd Brokerage	Real Estate Agency	12 Regent St, Thorold, ON L2V 1T1	Thorold	LSA	
169	Pizza Pizza	Pizza restaurant	45 Ormond St N, Thorold, ON L2V 1Y9	Thorold	LSA	
170	Rebel Soul Massage and Wellness	Massage therapist	45 Ormond St N, Thorold, ON L2V 1Y9	Thorold	LSA	
171	FYidocitors	Optometrist	45 Ormond St N unit 6, Thorold, ON L2V 1Y9	Thorold	LSA	
172	Hope & Harder Insurance Brokers	Insurance	45 Ormond St N, Thorold, ON L2V 1Y9	Thorold	LSA	
173	T Dot Auto Sales & Service	Used car dealer	55 Ormond St N, Thorold, ON L2V 1Y9	Thorold	LSA	
174	Keniry's Rad Shop	Auto repair shop	55 Ormond St N, Thorold, ON L2V 1Y9	Thorold	LSA	
175	Cosgrove Auto Repair & Machine	Auto repair shop	61 Ormond St N, Thorold, ON L2V 1Z3	Thorold	LSA	
176	CH Plumbing & Heating - HVAC Niagara	Plumber	65 Ormond St N, Thorold, ON L2V 1Z3	Thorold	LSA	
177	Performance Heating & Air Inc.	HVAC contractor	96 Front St N, Thorold, ON L2V 4R5	Thorold	LSA	
178	Miller Insulation	Insulation contractor	94 Front St N, Thorold, ON L2V 1V2	Thorold	LSA	
179	Julie's Tire & Auto	Auto repair shop	110 Front St N, Thorold, ON L2V 1Z3	Thorold	LSA	
180	Club Belvedere	Banquet hall	57 John St, Thorold, ON L2V 2S9	Thorold	LSA	
181	Primerica	Life insurance agency	133 Front St N Unit 7, Thorold, ON L2V 1Z3	Thorold	LSA	
182	Front Row Sports	Sporting goods store	133 Front St N, Thorold, ON L2V 1Z3	Thorold	LSA	
183	Big Red Food Service	Meat wholesaler	133 Front St N, Thorold, ON L2V 2S9	Thorold	LSA	
184	Dream Ironwork	Metal fabricator	65 Ormond St N #1, Thorold, ON L2V 1Z3	Thorold	LSA	
185	Upright Motors and Logistics Inc.	Used car dealer	89 Ormond St N, Thorold, ON L2V 1Z2	Thorold	LSA	
186	Steve's Place	Metal workshop	89 Ormond St N Unit 9, Thorold, ON L2V 1Z3	Thorold	LSA	
187	Thorold Auto Service	Car repair and maintenance service	111 Ormond St N, St. Catharines, ON L2T 1J7	St. Catharines	LSA	

#	Business Name	Type of Business	Address	Municipality	Study Area	Home Business
188	Dragonfly	Logistics service	120 Wellington St N Unit-3F, Thorold, ON L2V 5E7	Thorold	LSA	
189	Gospel BBQ	Grill store	120 Wellington St N, Thorold, ON L2V 5E7	Thorold	LSA	
190	BSI Distributor Source	Distribution service	Unit 3A, 120 Wellington St N, Thorold, ON L2V 5E7	Thorold	LSA	
191	VEC Canada	Wholesale Liquidation Auctions	120 Wellington St N., Thorold, ON L2V 5E7	Thorold	LSA	
192	Early Bird Restaurant	Restaurant	2 Merritt St, St. Catharines, ON L2T 1J3	St. Catharines	LSA	
193	Clearwater Paper Corporation	Paper distributor	45 Merritt St, St. Catharines, ON L2T 1J4	St. Catharines	LSA	
194	Biorigin SP	Manufacturer	45 Merritt St, St. Catharines, ON L2T 1J4	St. Catharines	LSA	
195	Santo Automotive Repair	Auto repair shop	44 Merritt St, St. Catharines, ON L2T 1J5	St. Catharines	LSA	
196	Accent Gallery & Custom Framing	Picture frame shop	16 Merritt St, St. Catharines, ON L2T 1J3	St. Catharines	LSA	
197	Townline Discount	Variety store	17 Townline Rd E, St. Catharines, ON L2T 1A1	St. Catharines	LSA	
198	SOS Towing	Towing service	424 Glendale Ave, St. Catharines, ON L2P 3Y3	St. Catharines	LSA	
199	Glendale Metal Company	Salvage yard	424 Glendale Ave, St. Catharines, ON L2P 3Y3	St. Catharines	LSA	
200	Thorold Welding and Fab Ltd.	Manufacturing	65 Ormond Street North, Thorold, ON L2V1Z3	Thorold	LSA	
201	Photography with Grace	Professional, scientific and technical services	20 Pine Street North, Unit B, Thorold, ON L2V0A1	Thorold	LSA	
202	Layers by Sarah	Hairdresser	2 Sullivan Avenue, Unit 1, Thorold, ON L2V2X9	Thorold	LSA	
203	PTT Automotive	Retail trade	54 Ormond Street South, Thorold, ON L2V1Y5	Thorold	LSA	
204	Segue Clinic	Health care and social assistance	8 Clairmont Street, Unit 1, Thorold, ON L2V1R1	Thorold	LSA	
205	White Oaks Conference Resort and Spa	Hotel	253 Taylor Rd, Niagara-on-the-Lake, ON L0S 1J0	Niagara-on-the-Lake	LSA	
206	YOUME Inc.	Flower pots, wood plastic floor	48 Glendale Ave, Niagara-on-the-Lake, ON L0S 1J0	Niagara-on-the-Lake	LSA	
207	Steed And Evans	Construction equipment supplier	3551 Leslie St, Allanburg, ON L0S 1A0	Thorold	LSA	
208	Inland Truck & Trailer Ltd.	Truck repair shop	1281 Old Thorold Stone Rd, Thorold, ON L2V 3Y7	Thorold	LSA	
209	QSL	Transportation service	1281 Old Thorold Stone Rd, Thorold, ON L2V 3Y7	Thorold	LSA	
210	MRP Reinforcing Inc	Steel fabricator	1281 Old Thorold Stone Rd Unit #1, Thorold, ON L2V 3Y7	Thorold	LSA	
211	Lucas Emergency Power Ltd.	Emergency, Industrial & Marine Power Systems	217 Niagara Falls Rd, Thorold, ON L2V 1J1	Thorold	LSA	
212	Iafate Machine Works Ltd	Machine shop	1150 Beaverdams Rd, Thorold, ON L2V 3Y7	Thorold	LSA	
213	GMC Aluminum Products	Siding contractor	225 Niagara Falls Rd, Thorold, ON L2V 1J1	Thorold	LSA	
214	AP Products Inc.	Recreational vehicle dealers	3363 Davis Road, Thorold, ON L2V 1J1	Thorold	LSA	

#	Business Name	Type of Business	Address	Municipality	Study Area	Home Business
215	Axe Building Systems Inc.	Prefabricated wood building manufacturing	3363 Davis Road, Thorold, ON L2V 1J1	Thorold	LSA	
216	BMI Group	Industrial real estate development / venture development	3363 Davis Rd, Thorold, ON L2V 1H7	Thorold	LSA	
217	Canada Clean Fuels Inc.	Petroleum, petroleum products, and other hydrocarbons merchant wholesalers	3363 Davis Road, Thorold, ON L2V 1J1	Thorold	LSA	
218	Canadian Maritime Engineering Ltd.	Engineering services	3363 Davis Road, Thorold, ON L2V 1J1	Thorold	LSA	
219	Char Technologies Inc.	Other electric power generation	3363 Davis Road PO Box 192, Thorold, ON L2V 3Z5	Thorold	LSA	
220	Destiny Copper	Copper supplier	3363 Davis Rd, Thorold, ON L2V 1J1	Thorold	LSA	
221	Ex Trans Cargo Inc.	Other freight transportation arrangement	3363 Davis Road, Thorold, ON L2V 1J1	Thorold	LSA	
222	Fortis Custom Builds	Finish carpentry contractors	3363 Davis Road Unit 38, Thorold, ON L2V 1J1	Thorold	LSA	
223	HOPA Ports	Federal port authority (Canada Port Authority)	3363 Davis Rd, Thorold, ON L2V 1J1	Thorold	LSA	
224	Iron and Oak Rail	Railroad rolling stock manufacturing	3363 Davis Road, Thorold, ON L2V 1J1	Thorold	LSA	
225	Kapacity Storage and Distribution	General warehousing and storage	3363 Davis Road, Thorold, ON L2V 1J1	Thorold	LSA	
226	Legacy Power Ltd.	Electrician	3363 Davis Rd, Thorold, ON L2V 1H7	Thorold	LSA	
227	Niagara Port Services Inc.	Port and harbour operations	3363 Davis Road, Thorold, ON L2V 1J1	Thorold	LSA	
228	Red Jar	Other electric power generation	3363 Davis Road, Thorold, ON L2V 1J1	Thorold	LSA	
229	Savage Niagara	Transportation service	3363 Davis Rd, Thorold, ON L2V 1H7	Thorold	LSA	
230	Skygauge Robotics	Coating, engraving, cold and heat treating and allied activities	3363 Davis Road, Thorold, ON L2V 1J1	Thorold	LSA	
231	Stormfisher Ltd.	Natural gas distribution	3363 Davis Road, Thorold, ON L2V 1J1	Thorold	LSA	
232	Sucro Can Canada Inc.	Sugar manufacturing	3363 Davis Road, Thorold, ON L2V 1J1	Thorold	LSA	
233	Tyromer Windsor Inc.	Tire manufacturing	3363 Davis Road, Thorold, ON L2V 1J1	Thorold	LSA	
234	American Express Global Business Travel	Travel agency	5 Metcalfe St, Thorold, ON L2V 2Z6	Thorold	LSA	✓
235	Bailey's Masonry Repairs Parging	Masonry contractor	41 Carleton St S, Thorold, ON L2V 1Z7	Thorold	LSA	✓
236	Blackbear Bakery	Bakery	56 Welland St S, Thorold, ON L2V 2B5	Thorold	LSA	✓
237	CircuiTree Electrical Solutions	Electrician	20 Vine St, Thorold, ON L2V 1S7	Thorold	LSA	✓
238	Invicta Handyman	Handyman	105 Ormond St N, Thorold, ON L2V 1Z3	Thorold	LSA	✓
239	Niagara Drain Master Plumbing Services	Plumber	12 Chapel St S, Thorold, ON L2V 2C4	Thorold	LSA	✓

#	Business Name	Type of Business	Address	Municipality	Study Area	Home Business
240	Qmastering	Recording studio	17 Cleveland St, Thorold, ON L2V 3K3	Thorold	LSA	✓
241	San G Dice	Dice and mold maker	18 Lynden St W, Thorold, ON L2V 3J7	Thorold	LSA	✓
242	Stitched Together Studio	Sewing company	68 1/2 Pine St S, Thorold, ON L2V 3L4	Thorold	LSA	✓
243	Strange Beauty Waxing & Sugaring	Hair removal service	86 Pine St S, Thorold, ON L2V 3L7	Thorold	LSA	✓
244	The Pretty Pooch	Pet grooming	30 Albert Street, Thorold, ON L2V 1P1	Thorold	LSA	✓
245	TotalCare Mobile Shine	Car detailing service	7 Maitland St, Thorold, ON L2V 3A4	Thorold	LSA	✓
246	Robinsong Bed and Breakfast	Bed and Breakfast	41 Welland St S, Thorold, ON L2V 2B6	Thorold	LSA	✓
247	AgentOS	Software company	177 Wright Crescent, Niagara-on-the-Lake, ON L0S 1J0	Niagara-on-the-Lake	LSA	✓
248	Country Truck and Trailer Repair	Truck repair shop	22 Haynes Ct, Niagara-on-the-Lake, ON L0S 1J0	Niagara-on-the-Lake	LSA	✓
249	Lifestyle Wellness Club	Health consultant	21 Robertson Rd, Niagara-on-the-Lake, ON L0S 1J0	Niagara-on-the-Lake	LSA	✓
250	GeM Cakes	Wedding bakery	29 Robertson Rd, Niagara-on-the-Lake, ON L0S 1J0	Niagara-on-the-Lake	LSA	✓
251	Boujee Palour	Hair extension technician	104 Cole Crescent, Niagara-on-the-Lake, ON L0S 1J0	Niagara-on-the-Lake	LSA	✓
252	Home Depot Cleaning Services - Steam Dry Canada - Niagara Regio	Air duct cleaning service	45 Cole Crescent, Niagara Falls, ON L0S 1J0	Niagara Falls	LSA	✓
253	Weinbrenner Place Inc	Apartment rental agency	9582 Beaverdams Rd, Niagara Falls, ON L2H 0P9	Niagara Falls	LSA	✓

Appendix B

Interview Introduction Letters and Project Information Booklet

Walker South Landfill Phase 2 Environmental Assessment



September 9, 2025

Subject: Business Interview for the Walker Environmental South Landfill Phase 2 Environmental Assessment

Hello,

My name is Angus Keir, and I am with Avaanz Ltd. We are a socio-economic and environmental consulting firm that has been retained by Walker Environmental Group (Walker) to complete an Economic Assessment of their proposed South Landfill Phase 2 project in Niagara Falls. Walker currently owns and operates the South Landfill, located near the intersection of Taylor Road and Mountain Road in the City of Niagara Falls. The South Landfill Phase 2 project involves developing the next phase of landfilling operations on quarry lands owned by Walker, east of Taylor Road.

We are interviewing owners and operators of businesses located in the vicinity of the South Landfill. We would appreciate the opportunity to learn more about your business and whether you anticipate any impacts or business opportunities from the proposed South Landfill Phase 2 project. The information we are collecting includes your views, and any issues or concerns you identify will be used as part of the economic impact assessment of Walker's Environmental Assessment. All information will be treated in the strictest confidence and will be aggregated for the purpose of analysis. No individual views will be attributed to a specific person or business.

We understand your time is valuable, therefore we are happy to schedule an interview (in-person, online, or by phone) at a date and time that is convenient for you. The interview should only take about 30-45 minutes of your time.

To schedule a meeting, please feel free to contact me at the phone number or email address below. I look forward to hearing from you.

Sincerely,



Angus Keir
Principal, Avaanz Ltd.
angus.keir@avaanz.ca | 647-781-8132

September 9, 2025

Subject: Real Estate Professionals Interview for the Walker Environmental South Landfill Phase 2 Environmental Assessment

Hello,

My name is Angus Keir, and I am with Avaanz Ltd. We are a socio-economic and environmental consulting firm that has been retained by Walker Environmental Group (Walker) to complete an Economic Assessment of their proposed South Landfill Phase 2 project in Niagara Falls. Walker currently owns and operates the South Landfill, located near the intersection of Taylor Road and Mountain Road in the City of Niagara Falls. The South Landfill Phase 2 project involves developing the next phase of landfilling operations on quarry lands owned by Walker, east of Taylor Road.

We are interviewing real estate professionals in Niagara Region. We would appreciate the opportunity to speak with you regarding trends in the local real estate market, and any impacts or concerns associated with the South Landfill and the proposed Phase 2 project. The information we are collecting includes your views, and any issues or concerns you identify will be used as part of the economic impact assessment of Walker's Environmental Assessment. Views and concerns will be treated in the strictest confidence and will be aggregated for the purpose of analysis. No individual views will be attributed to a specific person or real estate brokerage.

We understand your time is valuable, therefore we are happy to schedule an interview (in-person, online, or by phone) at a date and time that is convenient for you. The interview should only take about 45 minutes of your time.

To schedule a meeting, please feel free to contact me at the phone number or email address below. I look forward to hearing from you.

Sincerely,



Angus Keir
Principal, Avaanz Ltd.
angus.keir@avaanz.ca | 647-781-8132

Subject: Interview Request for the Walker Environmental South Landfill Phase 2 Environmental Assessment

Hello,

My name is _____, and I am with Avaanz Ltd. We are a socio-economic and environmental consulting firm that has been retained by Walker Environmental Group (Walker) to complete an Economic Assessment of their proposed South Landfill Phase 2 Project in Niagara Falls. Walker currently owns and operates the South Landfill, located near the intersection of Taylor Road and Mountain Road in the City of Niagara Falls. The South Landfill Phase 2 project involves developing the next phase of landfilling operations on quarry lands owned by Walker, east of Taylor Road.

Please find attached the South Landfill Phase 2 Information Booklet prepared by Walker, which provides additional background on the project.

We are interviewing representatives from a range of organisations including business/industry associations, economic development offices, labour organisations, tourism organisations, and municipal finance departments in Niagara Region. We would appreciate the opportunity to learn more about your insights and views regarding the economic environment and whether you anticipate any impacts from the proposed South Landfill Phase 2 project. The information we are collecting includes your views, and any issues or concerns you identify will be used as part of the economic impact assessment of Walker's Environmental Assessment.

We understand your time is valuable, therefore we are happy to schedule an interview (online, or by phone) at a date and time that is convenient for you. The interview should only take about 45 minutes of your time.

To schedule a meeting, please feel free to contact me at the phone number or email address below. I look forward to hearing from you.

Sincerely,

Name,

Position, Avaanz Ltd.

Email address | Phone

South Landfill Phase 2 **Environmental Assessment**

Information Booklet

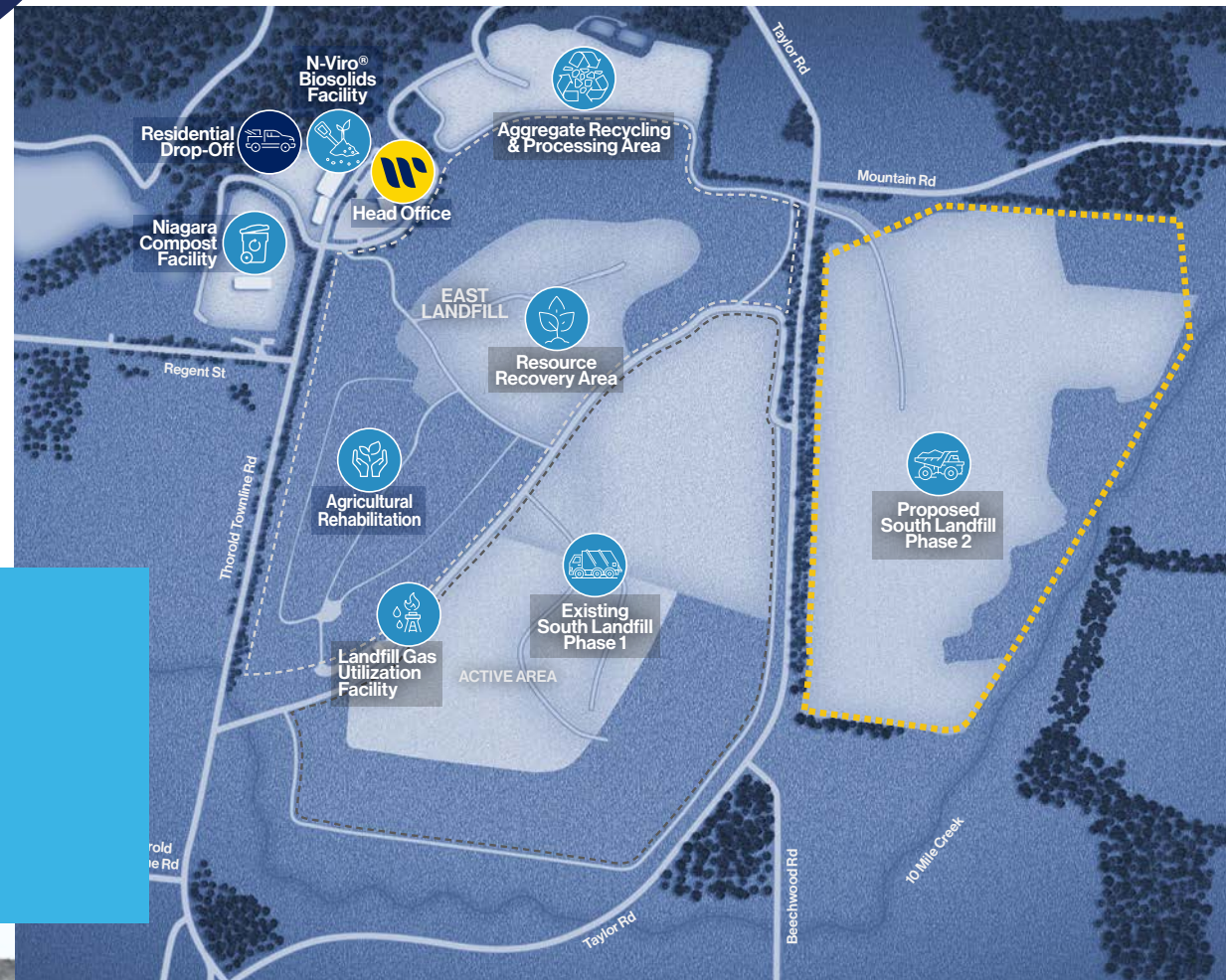


Safe & Reliable Waste Management

As the Niagara region continues to grow, planning for long-term waste disposal capacity is increasingly important. Despite recycling and green bin composting efforts, landfill space is still needed for non-recyclable materials.

More than a landfill

Walker's Resource Management Campus in Niagara is a dynamic operation that efficiently manages waste and sustainably recovers resources.



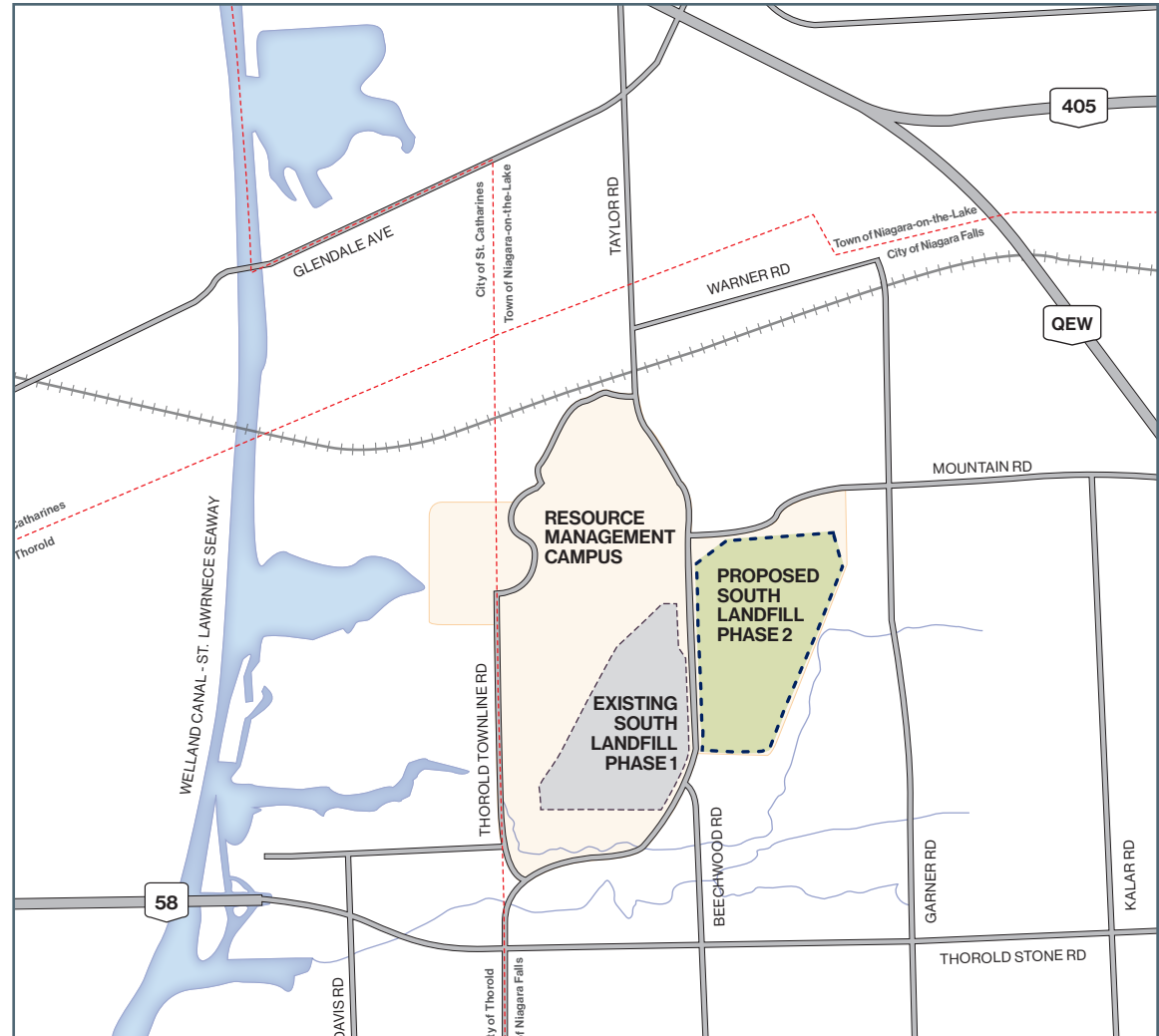
For over 40 years, Walker has played a key role in helping the community manage waste through safe disposal services. As the existing phase of the South Landfill in Niagara Falls reaches final capacity, we are proposing to develop the next phase of the landfill to continue to provide waste management for local residents and businesses.

Phase 2 of the South Landfill will provide additional disposal capacity over a 20-year period, supply renewable energy for the community by turning landfill gas into energy, and continue to be a major employer in the region.

Phase 2: The Future Development of the South Landfill

The South Landfill is a state-of-the-art, engineered landfill designed with exceptional safety and environmental controls that accepts only solid non-hazardous waste.

If approved, Phase 2 of the South Landfill would be developed on lands owned by Walker, located immediately east of current landfill operations. This site would allow for daily operations to seamlessly transition into a new adjacent fill area. Existing infrastructure such as the site entrance would not change.



Did you know?



- Our landfill produces enough renewable energy to power the equivalent of 25,000 homes
- Walker delivers landfill gas to the nearby GM Plant, where it is used to generate renewable electricity & heat, reducing their carbon footprint by 70%.

Phase 2 Key Facility Information



1.1 million tonnes of waste per year



18 million m³ total capacity



20 years of safe disposal



~500 jobs supported in Niagara

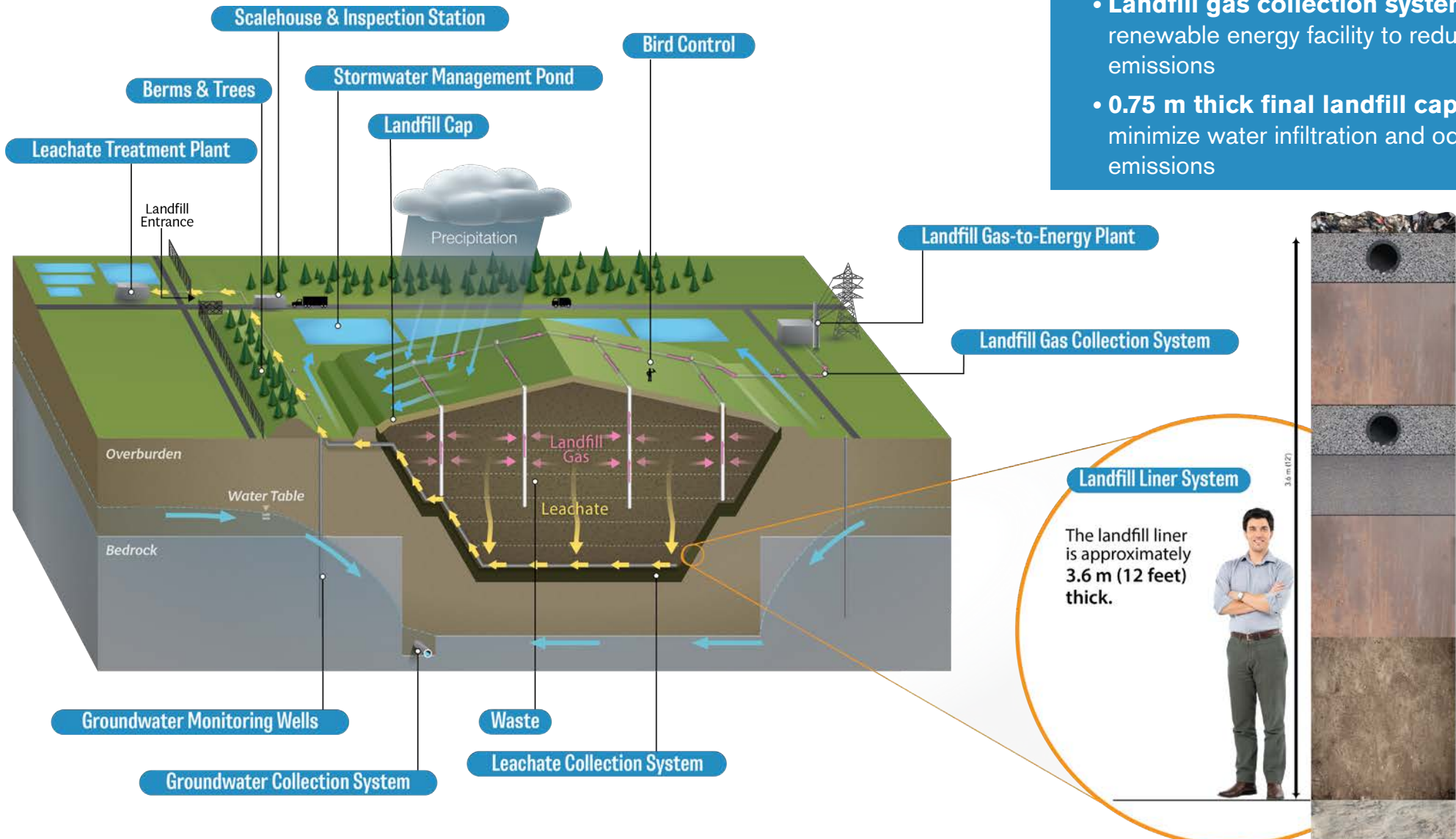


Enough energy to power the equivalent of 10,000 homes

Designed & Operated to the highest standard

Key Features

- Sophisticated **12-foot multi-layer liner** that creates a **barrier** between waste and the environment
- **Leachate collection & treatment system** for removal & treatment of water that comes into contact with waste
- **Landfill gas collection system & renewable energy facility** to reduce GHG emissions
- **0.75 m thick final landfill cap** to minimize water infiltration and odour emissions



Landfill Liner System

The landfill liner is approximately **3.6 m (12 feet) thick**.



* Liner system currently used at the South Landfill.

A planning process that **Incorporates Your Input**

Before Phase 2 can be built, it will undergo a **rigorous planning and decision-making process** called an Environmental Assessment.

This process is **regulated by the Ontario Ministry of the Environment, Conservation, and Parks (MECP)** through the *Environmental Assessment Act*, which is designed to protect, conserve, and wisely manage Ontario's environment.

A Two-Step Process

Step 1 - Terms of Reference (TOR)

This is the initial step in the EA process. It is a document that serves as the roadmap for what will be studied in the EA and outlines the public consultation that will take place.

Step 2 - Environmental Assessment (EA)

This is where the scientific studies occur. These studies identify the effects of the project, both positive and negative, and proposed mitigation measures where needed.

The Environmental Assessment Process

TERMS OF REFERENCE (TOR)



ENVIRONMENTAL ASSESSMENT (EA)



Why Walker?

Walker partners with communities to provide responsible solutions, finds innovative ways to recover resources from waste, and keep our people safe through our commitment to health and safety.



INDUSTRY EXPERTS

Four decades of landfill & resource recovery expertise



RESPONSIBLE OPERATORS

Extensive environmental monitoring & controls



FUTURE-ORIENTED

Committed to community & future generations



INNOVATORS

Safe and reliable landfill design & engineering

We Want to Hear from You!

Walker wants to hear your thoughts. Your feedback is valuable and helps inform our planning process so that we can develop a Niagara-based solution.

Anyone interested in the project can stay involved through our project website, public events and by contacting us directly. Learn more at southlandfillphase2.com.



Darren Fry

Project Director



Elizabeth Duguay

Planning & Community Engagement Lead



Leticia Koole

Project Support Specialist



Kaitlynn Valeriano

Communications & Community Outreach Manager

Connect With Us & Stay Involved



PROJECT WEBSITE

Visit to learn more & sign up to receive notifications
southlandfillphase2.com



PHONE

Call us at
1-866-699-9425



EMAIL

Send us an email at
info@southlandfillphase2.com



EVENTS

Attend public information sessions



 **walker**
southlandfillphase2.com

Appendix C

Interview Plan and Guides

Walker South Landfill Phase 2 Environmental Assessment



1. Background

Walker Environmental Group (WEG or “Walker”) is preparing an Environmental Assessment (EA) for the continuation of the South Landfill located at the Walker Resource Management Campus (Walker Campus) by developing Phase 2 which will provide approximately 18 million cubic metres of disposal capacity over a 20-year period.

Similar to the existing South Landfill, the proposed Phase 2 of the South Landfill will be a modern and highly engineered site consisting of a double composite liner system designed in accordance with Ontario Regulation 232/98: Landfilling Sites or equivalent and will continue to receive solid, non-hazardous waste from residential and IC&I sources from within its existing Ontario-wide service area, predominantly from the Niagara, Southern, and Southwestern Ontario regions. The South Landfill current annual maximum fill rate of 1.1 million tonnes is proposed to be maintained for South Landfill (Phase 2).

Avaanz Ltd. was retained by Walker to implement the Economics Assessment in accordance with a Work Plan.

The Economic Assessment Work Plan proposed that interviews are to be undertaken with various stakeholders including but not limited to businesses, business associations, economic development organisations, labour organisations, realtors, local real estate association, municipal finance departments, and other municipal departments.

The purpose of the interviews with stakeholders is to collect both quantitative and qualitative data needed for the characterisation of baseline economic conditions and for completing the effects assessment.

2. Stakeholder Interview Method

Stakeholder interviews involve the following steps:

1. Stakeholders identified in the contact list will initially be contacted by phone, email, or a drop-off letter (for neighbouring businesses). The purpose of this outreach is to determine if the individual is willing to participate in an interview with an Avaanz staff member. If contacted by phone the following script will be read to the potential interviewee. If contacted by email, the same message will be adapted into written form:

Businesses Owners/Operators

RE: Business Interview for the Walker Environmental South Landfill Phase 2 Environmental Assessment

Hello,

My name is _____ and I am with Avaanz Ltd. We are a socio-economic and environmental consulting firm that has been retained by Walker Environmental Group (Walker) to complete an Economic Assessment of their proposed South Landfill Phase 2 project in Niagara Falls. Walker currently owns and operates the South Landfill, located near the intersection of Taylor Road and Mountain Road in the City of Niagara Falls. The South Landfill Phase 2 project involves developing the next phase of landfilling operations on quarry lands owned by Walker, east of Taylor Road.

We are interviewing owners and operators of businesses located in the vicinity of the South Landfill. We would appreciate the opportunity to learn more about your business and whether you anticipate any impacts or business opportunities from the proposed South Landfill Phase 2 project. The information we are collecting includes your views, and any issues or concerns you identify will be used as part of the economic impact assessment of Walker's Environmental Assessment. All information will be treated in the strictest confidence and will be aggregated for the purpose of analysis. No individual views will be attributed to a specific person or business.

We understand your time is valuable, therefore we are happy to schedule an interview (in-person, online, or by phone) at a date and time that is convenient for you. The interview should only take about 30-45 minutes of your time.

- **If contacted by phone:** *Would you be open to scheduling a short interview?*
- **If contacted by email:** *To schedule a meeting, please feel free to contact me at the phone number or email address below.*

I look forward to hearing from you.

Regards,

[Name]

[Title]

Avaanz Ltd.

[Phone]

[Email]

Real Estate Professionals

RE: Real Estate Professionals Interview for the Walker Environmental South Landfill Phase 2 Environmental Assessment

Hello,

My name is _____ and I am with Avaanz Ltd. We are a socio-economic and environmental consulting firm that has been retained by Walker Environmental Group (Walker) to complete an Economic Assessment of their proposed South Landfill Phase 2 project in Niagara Falls. Walker currently owns and operates the South Landfill, located near the intersection of Taylor Road and Mountain Road in the City of Niagara Falls. The South Landfill Phase 2 project involves developing the next phase of landfilling operations on quarry lands owned by Walker, east of Taylor Road.

We are interviewing real estate professionals in Niagara Region. We would appreciate the opportunity to speak with you regarding trends in the local real estate market, and any impacts or concerns associated with the South Landfill and the proposed Phase 2 project. The information we are collecting includes your views, and any issues or concerns you identify will be used as part of the economic impact assessment of Walker's Environmental Assessment. Views and concerns will be treated in the strictest confidence and will be aggregated for the purpose of analysis. No individual views will be attributed to a specific person or real estate brokerage.

We understand your time is valuable, therefore we are happy to schedule an interview (in-person, online, or by phone) at a date and time that is convenient for you. The interview should only take about 45 minutes of your time.

- **If contacted by phone:** *Would you be open to scheduling an interview?*
- **If contacted by email:** *To schedule a meeting, please feel free to contact me at the phone number or email address below.*

I look forward to hearing from you.

Regards,

[Name]

[Title]

Avaanz Ltd.

[Phone]

[Email]

Other Organisations/ Municipal Departments

RE: [Organisation] Interview for the Walker Environmental South Landfill Phase 2 Environmental Assessment

Hello,

My name is _____ and I am with Avaanz Ltd. We are a socio-economic and environmental consulting firm that has been retained by Walker Environmental Group (Walker) to complete an Economic Assessment of their proposed South Landfill Phase 2 Project in Niagara Falls. Walker currently owns and operates the South Landfill, located near the intersection of Taylor Road and Mountain Road in the City of Niagara Falls. The South Landfill Phase 2 project involves developing the next phase of landfilling operations on quarry lands owned by Walker, east of Taylor Road.

We are interviewing representatives from a range of organisations including business/industry associations, economic development offices, labour organisations, tourism organisations, and municipal finance departments in Niagara Region. We would appreciate the opportunity to learn more about your insights and views regarding the economic environment and whether you anticipate any impacts from the proposed South Landfill Phase 2 project. The information we are collecting includes your views, and any issues or concerns you identify will be used as part of the economic impact assessment of Walker's Environmental Assessment.

We understand your time is valuable, therefore we are happy to schedule an interview (online, or by phone) at a date and time that is convenient for you. The interview should only take about 45 minutes of your time.

- **If contacted by phone:** *Would you be open to scheduling an interview?*
- **If contacted by email:** *To schedule a meeting, please feel free to contact me at the phone number or email address below.*

I look forward to hearing from you.

Regards,

[Name]

[Title]

Avaanz Ltd.

[Phone]

[Email]

2. Should the individual not feel that he/she should be interviewed; the Avaanz interviewer shall inquire whether there is someone else in his or her organisation that should or could be interviewed. If yes, thank the individual and obtain the contact information for the recommended individual. Contact the recommended individual for a personal/telephone interview.

3. Should the individual need more information about the interview and kinds of questions, the interviewer shall provide more details and suggest that a set of questions can be emailed in advance of the meeting/telephone interview.
4. Agree on date and time for the interview and obtain contact information (including street address / mailing address and email address).
5. Confirm date and time of the interview via email immediately upon termination of telephone call and at least one day in advance of the meeting/telephone interview date. An email confirming the date and time of the interview will be sent to those selected for a personal interview along with background information material supplied by Walker on the proposed Project.
6. Upon meeting/calling the individual, the Avaanz interviewer shall introduce themselves, their role on the project and exchange business cards (if a personal interview). Before beginning the interview, the interviewer shall ask:

"Would you be comfortable with me recording this conversation for transcription purposes only? The recording will be used to ensure accuracy in documentation and will remain confidential."

The interviewer shall then begin the interview with the following introduction:

"Are you familiar with the proposal for the South Landfill Phase 2 project in Niagara Falls for solid, non-hazardous waste? Would you like to know more about the site and the expansion proposal?"

If "yes", the interviewer shall provide the following background. Otherwise, the interview shall continue according to the interview guide.

The Walker Campus is located at 2800 Thorold Townline Road, near the intersection of Taylor Road and Mountain Road in the City of Niagara Falls. This site is located on top of the Niagara Escarpment near the Thorold Tunnel.

The Campus has existed since the 1880's and has provided safe and reliable waste disposal services for the past 40 years. The South Landfill (Phase 1) is currently approved for residual waste plus soil used for daily and interim cover. The current approved capacity at the South Landfill (Phase 1) is estimated to be reached between 2029 and 2031.

Phase 2 of this landfill is to be located in Walker's mined out quarry immediately east of Taylor Road. This will extend to the life of the existing landfill by approximately 18 million m³ over a 20-year period. Similar to the existing South Landfill, the proposed Phase 2 of the South Landfill will be a modern and highly engineered site consisting of a double composite liner system.

After the background information has been provided, the interviewer will proceed with the interview by asking the questions in accordance with the appropriate Interview Guide provided in Section 4.0.

3. Interview Documentation

All interviews will be documented during the interview either by hand (for in-person interviews) or on a computer (for telephone interviews), following the sequence of questions where possible.

If the interviewee consents, the interview may be audio recorded for transcription purposes. Recordings will be used solely to ensure the accuracy of documentation and will remain confidential. Even when a recording is made, interviewers will continue to take notes during the interview.

Each interview record shall include the following information:

- Name of organisation.
- Address and telephone number of organisation / individual(s) interviewed.
- Date of interview.
- Name of individual (s) interviewed.
- Name of Avaanz interviewer; and
- Discussion summary.

For all personal interviews, the interview record shall be prepared and provided to the interviewee (if requested). Telephone interviews will also be documented question by question (if possible).

4. Interview Guides

The interview guides presented below provide the basis for conducting telephone or personal interview for the purpose of the economic impact assessment for the South Landfill Phase 2 Project Environmental Assessment. These interviews are not intended to be a public affairs activity. The interviewer shall direct any respondent who has specific questions about the project to Walker Environmental Group and the Project website.

The questions set out are intended as a flexible guide to support open and conversational interviews. Not all questions may be asked, and interviewers may introduce additional or follow-up questions depending on the flow of discussion and the participant's expertise.

4.1 Owners/Operators of Businesses Within Proximity of the South Landfill

Themes/Questions:

1. Could you please describe your business and provide us with or direct us to any documents or websites you may have that provide the following information:
 - The full range of programs, products and services you provide.
 - The geographic area that your business serves.
 - Who your customers are.
 - Number of staff at your business.
2. How long has your business been established at its current location?
3. Why did you choose this area for your business?
4. What types of outdoor activities, if any, are conducted at this location?
5. What are the key issues facing your business today?
6. What are the future plans for your business (e.g., new facilities, products, services, expansions, closures, amalgamations)?
7. In what ways if any, has the presence of the Walker positively or adversely affected your operations?
8. In your opinion, would the development of the South Landfill Phase 2 project, its employees or activities have any effect (positive or negative) on your operation?
 - If "yes", in what ways might it be affected?
9. What benefits do you see of having Walker conducting business in your community?
10. If the South Landfill Phase 2 project were to proceed, what might be the most important thing you would want Walker to know?

Conclusion

11. Thank you for your time and participation. Do you suggest that we speak with anyone else for additional insight on the questions we discussed today?
12. Is there any specific information you would like to receive from Walker or a question you would like answered about the South Landfill Phase 2 project?

4.2 Real Estate Professionals

Organisation	Office Location(s)	Website
Boldt Realty Inc. Brokerage	St. Catharines	boldtrealty.ca
Davids & DeLaat	St. Catharines	davidsdelaat.com
McGarr Realty Corp.	St. Catharines, Niagara-on-the-Lake	mcgarrrealty.com
Royal LePage NRC Realty	Niagara Falls, St. Catharines, Niagara-on-the-Lake	nrcrealty.ca
Century 21 Heritage House Ltd.	Niagara Falls, St. Catharines	heritagehouseniagara.c21.ca
Niagara Association of REALTORS® (NAR)	St. Catharines	niagararealtor.ca
Revel Realty	Niagara Falls	revelrealty.ca

Themes/Questions:

1. In which municipalities do you tend to work most in (i.e., what geographic area do you serve)?
2. Which types of properties do you mainly specialise in (i.e., residential, commercial, industrial, agricultural properties)?
3. How has the real estate market performed over the last year? (i.e. strong, modest, weak)
4. Are there certain property sectors that are performing better than others?
5. Are there certain geographic areas / locations that are performing better than others?
6. What are the key factors are affecting the property sector markets?
7. What are the trends over the last year with regards to the following:
 - a. Prices (rising, plateauing, falling)
 - b. Property listings (high, moderate, low)
 - c. Days on market (short period, typical, long period)
 - d. Sale price relative to list price (higher, even, lower)
 - e. Competition for properties (high, moderate, low)
8. Do you anticipate these trends continue for the foreseeable future? If so, why?
9. What are the main issues or factors that determine residential property values in your area?
10. Are people generally moving into or out of your area? What are the demographics of people buying and selling property in your area (i.e., own / rent; families / couples / singles; older / younger; high density / low density)?
11. To your knowledge, has the presence of Walker had any noticeable impacts—positive or negative—on the local real estate market? If “yes”, how so? Are these impacts concentrated in specific neighbourhoods or areas, or are they more widespread across the local market?
12. To your knowledge, is the proposed South Landfill Phase 2 project creating any concerns among buyers, sellers, or developers in the local real estate market? If “yes”, what are the key concerns? Are these concerns specific to certain neighbourhoods or more widespread?

13. Are the concerns noted in the last question affecting any of the following?
 - a. Supply
 - b. Demand
 - c. Pricing
 - d. Days on market
 - e. Property values
14. If the South Landfill Phase 2 project proceeds to construction and operation, how do you anticipate it might impact the local real estate market in the short and long term?
15. Are there any measures that could be put in place to alleviate concerns from property owners or prospective buyers? If so, what measures?
16. If the South Landfill Phase 2 project were to proceed, what might be the most important thing you would want Walker to know?

Conclusion

17. Thank you for your time and participation. Do you suggest that we speak with anyone else for additional insight on the questions we discussed today?
18. Is there any specific information you would like to receive from Walker or a question you would like answered about the South Landfill Phase 2 project?

4.3 Municipal Finance

Municipality	Department Name	Website
City of Niagara Falls	Finance Department	niagarafalls.ca
Town of Niagara-on-the-Lake	Finance and Taxation	notl.com
City of St. Catharines	Financial Management Services	stcatharines.ca
City of Thorold	Financial Services	thorold.ca
Niagara Region	Corporate Services – Finance	niagararegion.ca

Themes/Questions:

1. Please describe your role in the municipality/region.
2. In your opinion, what are the key issues currently influencing the financial or economic status of your municipality?
3. Does the municipality/region currently have any pressing financial issues (on revenue on the operating budget, on revenue on the capital budget)?
4. Are there any operational financial challenges forecast in the short term/ long term (e.g. roads budget, social housing, etc.)
5. Are there any major projects requiring municipal/region funding in the short/long term?
6. Does the municipality/region foresee any pressing financial issues in the years ahead?
7. What is the most appropriate financial statement and/or strategic plan?
8. From your perspective, what is the most important attribute of your community that needs to be maintained or enhanced to support community well-being over the next decade?
9. From your perspective, what do you feel is the greatest threat to your community’s overall well-being over the next decade and beyond?

10. How important is to maintain a positive community image to the financial or economic status of your municipality/region? Please explain.
11. Over the past five years, has the stability of your municipal finances generally improved, declined, or stayed the same? Why?
12. From your perspective, has the presence of Walker had any positive economic effect on your community – specifically your municipality’s finances? (e.g., help stabilize economic base, increase services to the community through development charges, etc.). Please explain.
13. From your perspective, has the presence of the Waker had any adverse economic effects on your community - specifically your municipality’s finances? (e.g., detracting from residential development, maintaining bond ratings, etc.). Please explain.
14. Can any of your municipal financial plans or activities be attributed to the presence the Walker, their employees or activities? If yes, how much or in what ways?
15. Has the presence of Walker in your community, their employees or activities had any other effect on your municipal finance plans or activities? If yes, in what ways have they been affected?
16. Does your department have any formal or informal links with Walker? If “yes”, please describe.
17. How has the existing South Landfill Project impacted your organisation’s environmental service costs?
18. How has the existing South Landfill Project impacted your organisations wastewater treatment costs?
19. How could the Phase 2 project effect these impacts?
20. In what ways, if any, do you think that the South Landfill Phase 2 Project might change the manner in which your organisation undertakes its plans and activities?
21. Is there potential for the South Landfill Phase 2 project to be synergistic with any of the major projects contemplated by the municipality / region?
22. What measures do you think should be taken to maximise the project’s positive effects on economic development and municipal finance in your community?
23. If the Project moves forward, what might be the most important thing you would want Walker to know? What is the most important concern or comment you have regarding this project?

A review of government finances will be undertaken to provide an understanding of municipal revenues and expenditures (and reserve funds) to operate municipal services and infrastructure¹.

24. What was the driver for any increase or decrease in property tax revenues?
25. Has there been an increase or decrease to user fees and service charge revenue? What are the main drivers of this (e.g. water and wastewater rates)?
26. For planning and development expenditures - what drove the increase or decrease in expenditures?
27. Is there anything else in recent revenue and expense trends that you think is important for us to know about?
28. Can you provide any details on what the obligatory reserve funds and the discretionary reserve funds are earmarked for?

¹ *Applicable questions only – to be updated once a review of the financial statements is complete. Questions will become more specific once an understanding of the available documents have been obtained.*

Conclusion

29. Thank you for your time and participation. Do you suggest that we speak with anyone else for additional insight on the questions we discussed today?
30. Is there any specific information you would like to receive from Walker or a question you would like answered about the South Landfill Phase 2 project?

4.4 Economic Development

Interviews will be conducted virtually online, over telephone, or in-person as requested.

Organisation / Department	Area	Website
Niagara Economic Development	Niagara Region	niagaracanada.com
City of St. Catharines Economic Development and Government Relations	St. Catharines	stcatharines.ca
City of Niagara Falls Business Development	Niagara Falls	niagarafalls.ca
City of Thorold Economic Development	Thorold	thorold.ca
Town of Niagara-on-the-Lake Economic Development	Niagara-on-the-Lake	notl.com

Themes/Questions:

1. Can you please describe your department/organisation and your role within it?
 - What are the main economic development priorities of your organisation?
 - Are there specific sectors that your organisation focuses on?
2. How would you characterise the current state of the local economy? (e.g., strong, stable, declining)
3. Are there particular industries performing especially well or facing challenges right now?
4. What are the most pressing economic issues currently facing your community?
5. Have you observed any emerging trends in business development, investment attraction, or entrepreneurship over the last year?
6. From your perspective, what is the outlook for the local economy over the next 1–3 years? (e.g., growth, stability, decline, uncertain)
7. What are the key factors influencing your outlook?
8. Is your area considered attractive for investment and business expansion? Why or why not?
9. What major infrastructure or economic development initiatives are currently planned or underway in your community or region?
10. Do you have any planned or upcoming initiatives to support workforce development, innovation, or industry diversification?
11. From your perspective, has the presence of Walker had any noticeable effects—positive or negative—on local economic development?
12. Does your department have any formal or informal engagement with Walker? If “yes”, please describe.
13. From an economic development standpoint, does the proposed South Landfill Phase 2 project present any concerns? If “yes”, what are they?

14. Do you see any opportunities for economic development or local business activity if the South Landfill Phase 2 project proceeds?
15. Are any potential effects—positive or negative—more likely to affect specific sectors or geographic areas?
16. Do you see potential synergies between this project and other planned development or investment initiatives in the region?
17. What actions could Walker take to minimise negative impacts or enhance benefits to the local economy?
18. If the South Landfill Phase 2 project proceeds, what is the most important thing you would want Walker to understand from your perspective?

Conclusion

19. Thank you for your time and participation. Do you suggest that we speak with anyone else for additional insight on the questions we discussed today?
20. Is there any specific information you would like to receive from Walker or a question you would like answered about the South Landfill Phase 2 project?

4.5 Business Associations/Chambers of Commerce

Organisation	Area	Website
Greater Niagara Chamber of Commerce (GNCC)	Niagara Region	gncc.ca
South Niagara Chamber of Commerce	Niagara Falls, Greater Fort Erie, Port Colborne-Wainfleet, and Welland-Pelham	southniagaracc.com
Niagara-on-the-Lake Tourism / Chamber of Commerce	Niagara-on-the-Lake	niagaraonthelake.com
Niagara Board of Trade and Commerce (NBOTAC)	Thorold and area	nbotac.com
Niagara Industrial Association (NIA)	Region-wide (Industrial Sector)	niagaraindustry.com
Niagara Home Builders Association (NHBA)	Niagara Region	nhba.ca

Themes/Questions:

1. Please describe your organisation and your role within it.
 - How many businesses do you represent?
 - Does your association represent businesses across all sectors, or are there particular industries or types of members that are more active or prominent?
2. How would you describe the current business climate in your area? (e.g., strong, stable, declining, uncertain)
3. Are there specific industries or business types that are performing particularly well or struggling right now?

4. What are the most significant challenges currently facing businesses in your area?
5. Have you observed any emerging trends in business activity over the last year?
6. From your perspective, what is the outlook for business performance in your area over the next 1-3 years? (e.g., growth, stability, decline, uncertain)
7. What are the key factors influencing your outlook?
8. Is your area seen as attractive for new businesses or investment? Why or why not?
9. Are there any other major infrastructure or economic development projects your organisation is monitoring or involved with?
10. From your perspective, has the presence of Walker had any noticeable effects—positive or negative—on the local business environment? If “yes”, please describe.
11. Does your organisation have any formal or informal links with the Walker? If “yes”, please describe.
12. Is the proposed South Landfill Phase 2 project raising any concerns among the business community? If “yes”, what are the key concerns?
13. Do you see any opportunities for local businesses if the South Landfill Phase 2 project proceeds?
14. Are any potential effects—positive or negative—more likely to affect specific sectors or geographic areas?
15. What actions could Walker take to minimise negative impacts or enhance benefits to the local business community?
16. If the project moves forward, what is the most important thing you would want Walker to understand from the business community’s perspective?

Conclusion

17. Thank you for your time and participation. Do you suggest that we speak with anyone else for additional insight on the questions we discussed today?
18. Is there any specific information you would like to receive from Walker or a question you would like answered about the South Landfill Phase 2 project?

4.6 Labour Organisations

Organisation	Sector	Description	Website
Niagara Haldimand Building Trades Council	Skilled trades / construction	Represents unionized skilled trades in construction across Niagara and Haldimand.	niagarabuildingtrades.com
Niagara Regional Labour Council (NRLC)	Multi-sector / umbrella body	Represents unionized workers across Niagara; affiliated with the Canadian Labour Congress.	nrlc.ca

Themes/Questions:

1. Please describe your organisation and your role within it.
 - What sectors or trades do your members represent?
 - Approximately how many workers are part of your membership?
 - What geographic area do you serve?

2. From your perspective, what are the primary issues facing employees in the workplace? What are the main short-term and long-term challenges you foresee for workers in the region?
3. How would you describe the current state of labour and employment in Niagara?
4. Have you observed any recent changes or emerging trends in the local labour market?
5. Are your members currently engaged in any collective bargaining or workplace negotiations? If so, what are the major priorities or concerns?
6. To your knowledge, has the presence of Walker had any noticeable impacts—positive or negative—on local workers or your members? If “yes”, in what ways?
7. Has your organisation had any direct interaction with Walker (formal or informal)?
 - Please describe the nature of the relationship.
8. Do your members have experience working for Walker or its subcontractors?
 - If so, what has been their experience?
9. Is the proposed South Landfill Phase 2 project raising any concerns or questions among your members or within the labour community more broadly? If “yes”, what are the primary concerns related to the project?
10. Do you see potential benefits for workers or the local labour force if the project proceeds?
11. Are any of these concerns or opportunities likely to affect specific trades, industries, or geographic areas more than others?
12. Are there steps Walker could take to help mitigate concerns or enhance positive outcomes for workers?
13. If the South Landfill Phase 2 project proceeds, what is the most important thing you would want Walker to understand from the labour community’s perspective?

Conclusion

14. Thank you for your time and participation. Do you suggest that we speak with anyone else for additional insight on the questions we discussed today?
15. Is there any specific information you would like to receive from Walker or a question you would like answered about the South Landfill Phase 2 project?

4.7 Tourism Organisations

Interviews will be conducted virtually online, over telephone, or in-person as requested.

Organisation	Geographic Focus	Description / Role	Website
Niagara Falls Tourism	City of Niagara Falls	Official destination marketing organisation for Niagara Falls; promotes attractions, events, and accommodations.	niagarafallstourism.com
Tourism Partnership of Niagara (TPN)	Niagara Region (Regional Tourism Organisation – RTO2)	Leads regional marketing, product development, and research for tourism across Niagara.	tpn.travel visitniagaracanada.com
Niagara-on-the-Lake Tourism / Chamber of Commerce	Niagara-on-the-Lake	Combines tourism promotion and business support; markets local events, wineries, and accommodations.	niagaraonthelake.com
St. Catharines Tourism (via Invest in STC)	City of St. Catharines	Promotes local festivals, cultural events, and tourism initiatives within the city.	investinstc.ca

Themes/Questions:

1. Please describe your organisation and your role within it.
2. How would you describe the current state of the tourism sector in your area (e.g., strong, weak, uncertain)?
3. What are the key tourism assets, experiences, or destinations that draw visitors to your area?
4. What are the top challenges currently facing the tourism sector in your area?
5. What trends have you observed over the past 1–2 years related to:
 - a. Visitor numbers
 - b. Visitor spending
 - c. Types of tourists
 - d. Seasonal patterns
 - e. Popular activities or attractions
6. From your perspective, what is the outlook for tourism in your area over the next 1-3 years? What are the key factors influencing your outlook?
7. Is your organisation currently involved in any major destination development or infrastructure initiatives? If “yes”, please describe.
8. To your knowledge, has the presence of Walker had any noticeable effects—positive or negative—on tourism, local image, or visitor perceptions? If “yes”, please describe.
9. Has your organisation had any direct or indirect interaction with Walker? If “yes”, please describe.
10. Do you anticipate the South Landfill Phase 2 project will affect the tourism sector in any way—either positively or negatively? If “yes”, what aspects of tourism could be affected?
11. Are there particular attractions, businesses, or geographic areas that could be more directly impacted by the project than others?

12. If the South Landfill Phase 2 project proceeds, what steps could be taken to reduce potential negative impacts on the tourism sector or enhance benefits?
13. From your perspective, what is the most important thing Walker should understand about the tourism economy in your area?

Conclusion

14. Thank you for your time and participation. Do you suggest that we speak with anyone else for additional insight on the questions we discussed today?
15. Is there any specific information you would like to receive from Walker or a question you would like answered about the South Landfill Phase 2 project?