

Appendix I-11

**Economic Environment Detailed Impact
Assessment Report**

Draft Economic Detailed Impact Assessment

Walker South Landfill Phase 2 Environmental Assessment

JUNE 2026

AVAANZ LTD



Draft Economic Detailed Impact Assessment

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 Detailed Impact Assessment, Walker South Landfill Phase 2 Environmental Assessment.

Sincerely,
Avaanz Ltd.

A handwritten signature in black ink, appearing to read 'Angus Keir'.

Angus Keir
Principal
Avaanz Ltd.

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- Appendix B. South Landfill Phase 2 Environmental Assessment Interview Introduction Letters and Project Information Booklet
- Appendix C. Interview Plan and Guides

Glossary and Abbreviations

The following acronyms and abbreviations are used in this report.

Abbreviation	Definition
AAQC	Ambient Air Quality Criteria; the maximum airborne contaminant concentrations established by the MECP
CMA	Census Metropolitan Area; a Statistics Canada geographic unit
CMHC	Canada Mortgage and Housing Corporation
CR	Common Receptor; a defined receptor location used in the nuisance assessment (e.g., CR01)
CVA	Current Value Assessment; the assessed property value determined by MPAC
DID	Difference-in-Differences; the regression method used to test property-value effects
EA	Environmental Assessment
FCR	Facilities Characteristics Report
FIR	Financial Information Return; the annual municipal financial report filed with the Province of Ontario
FTE	Full-Time Equivalent; a measure of employment
GDP	Gross Domestic Product
GTA	Greater Toronto Area
HST	Harmonized Sales Tax
IC&I	Industrial, Commercial and Institutional; a category of non-residential waste
LFG	Landfill Gas
LSA	Local Study Area
MECP	Ontario Ministry of the Environment, Conservation and Parks
MLS	Multiple Listing Service; a real estate sales database
MPAC	Municipal Property Assessment Corporation
NAICS	North American Industry Classification System
NNA	Near-Neighbour Area
NOC	National Occupational Classification
NRBCPI	Non-Residential Building Construction Price Index (Statistics Canada)
OU	Odour Unit; a measure of odour concentration
POR	Place of Residence; the basis for allocating certain economic effects
PVPP	Property Value Protection Program
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

Abbreviation	Definition
TRREB	Toronto Regional Real Estate Board
TSP	Total Suspended Particulate; airborne dust assessed against the AAQC

1. Introduction

This report documents the Economic impact assessment of the Preferred Method for the Environmental Assessment (EA) to develop the next phase of the existing South Landfill (i.e., South Landfill Phase 2) located at the Walker Resource Management Campus (Campus). The proposed South Landfill Phase 2 will add approximately 19.8 million cubic metres (m³) of landfill capacity over a 20-year period.

In the preceding Alternative Methods phase of the EA, net effects analyses as well as a comparative evaluation of three Alternative Landfill Configuration Options and two Leachate Management Options were carried out in order to identify a Preferred Landfill Footprint and a Preferred Leachate Management Option. The three Alternative Landfill Configuration Options and two Leachate Management Options presented in the Alternative Methods phase were developed to a conceptual level of design and documented in a Conceptual Design Report (CDR). The potential environmental effects, preliminary impact management measures to address the potential adverse environmental effects, and the remaining net effects following the application of the impact management measures were identified for all three Alternative Landfill Configuration Options and both Leachate Management Options. The Preferred Landfill Configuration Option was determined to be Option A (*Same Height and Slopes as Current South Landfill Phase 1¹*) and the Preferred Leachate Management Option was determined to be Option A (*Continued and Expanded Use of the Municipal Wastewater Treatment System*), hereafter collectively referred to as the Preferred Method.

At the detailed impact assessment phase, additional details are developed for the Preferred Method from a design and operations perspective, as documented in a Facilities Characteristics Report (FCR), so that potential environmental effects, preliminary impact management and compensation measures, and resultant net effects described at the Alternative Methods stage can be reviewed and more accurately defined, as required, along with enhancement opportunities and approval requirements. Specifically, the following can be accomplished:

- Potential environmental effects can be identified with more certainty.
- More site-specific impact management measures can be developed for application.
- Additional mitigation and impact management measures can be identified, as required.
- Net environmental effects can be identified with more certainty.
- Appropriate monitoring requirements can be clearly defined.
- Specific approval/permitting requirements for the proposed undertaking can be identified.

1. Following consultation on the comparative evaluation of the alternative methods, the Preferred Landfill Configuration Option was refined based on public, stakeholder and Government Review Team (GRT) comments and feedback received. Specifically, the proposed maximum height was decreased to reduce visual impact, the proposed Limit of Fill was adjusted in several areas to avoid sensitive natural features and to accommodate necessary infrastructure within the buffer, and slopes were adjusted to maximize compatibility with an agricultural end use, all of which resulted in a slightly reduced waste capacity.

Climate change mitigation and adaptation measures are also reviewed as part of the detailed site design established for the Preferred Method. In addition, during the impact assessment stage of the South Landfill Phase 2 EA, Walker Environmental Group (Walker) has committed to completing an assessment of the cumulative effects of the proposed undertaking and other non-Walker projects and activities that are existing, planned/approved or reasonably foreseeable within the Study Area.

The discipline-specific work plans developed during the Terms of Reference (ToR) outlined how impacts associated with the Preferred Method would be assessed. The results of these assessments are documented in 13 stand-alone Detailed Impact Assessment Reports:

- Geology and Hydrogeology
- Surface Water Resources
- Noise and Vibration
- Air Quality
- Terrestrial and Aquatic Environment
- Land Use
- Agriculture
- Transportation
- Social Environment
- Economic Environment
- Built Heritage and Cultural Heritage Landscapes
- Archaeology
- Visual

1.1 Description of the Preferred Landfill Configuration Option

Landfill Configuration Option A was originally selected as preferred due to its long-term benefits, including the largest waste capacity, longest operational lifespan, and associated economic and employment advantages. Following its selection, the design of Landfill Configuration Option A was refined in response to feedback received during consultation to reduce its visual impact and improve compatibility with a future agricultural end use. Furthermore, the Limit of Fill boundaries were adjusted to avoid natural features and to accommodate necessary infrastructure within the buffer. These refinements included a reduction in peak elevation to 211 metres above mean sea level (mAMSL) at the top of waste (TOW; 211.75 mAMSL at the top of cap), and adjustments to slope gradients, now designed to a maximum steepness of 3:1 (horizontal:vertical) for below-ground slopes and between 16:1 and 3.5:1 for above-ground slopes, improving the area compatible with an agricultural end use. These changes bring Option A closer in form to the Options B and C while preserving its advantage of a higher overall waste capacity. The refined Option A design would provide approximately 19.8 million m³ of expanded landfill capacity and include 44 hectares (ha) of land compatible with an agricultural end use.

From the Economics perspective, these adjustments represent a modest design trade-off whose significance is characterised here against the Economic Environment criteria and indicators established in the Approved ToR. With respect to the effect on the local economy, the refined capacity is approximately 2% below the 20,205,000 m³ Option A conceptual design capacity documented in the Conceptual Design Report (GHD, 2025) and evaluated in the Alternative Methods phase, a reduction too small in itself to alter the operational period. The FCR establishes an approximately 20-year operating period with closure anticipated in approximately 2050, extending the approximately 18-year operating life assumed in the Alternative Methods evaluation;

the effects in this report are assessed on the FCR schedule. The lower total fill volume marginally reduces the cumulative operations activity, and therefore the cumulative employment and GDP generated, over the life of the landfill. The increase in the area compatible with an agricultural end use from 36.7 ha to approximately 44 ha enhances long-term agricultural business opportunities, while the reduced visual profile lessens the potential for nuisance-related disruption at sensitive businesses, including tourism whose appeal to customers depends in part on environmental amenity. With respect to the effect on real estate, the Alternative Methods evaluation identified landfill presence and nuisance effects, including visual impacts, as the mechanism for potential reductions in the market value of property in the LSA; by reducing the landfill's visual presence at source, the refinements reduce the potential for such effects to arise. With respect to the effect on public finance, the marginally reduced capacity does not materially change the operational period and therefore the duration of landfill property tax payments, while the larger agricultural end-use area increases the potential post-closure addition to the local property assessment base. With respect to the cost of services, the marginally reduced capacity slightly reduces the total amount of waste that customers can send to a local landfill disposal service with low transportation costs based on proximity; the cost of waste services to customers is otherwise unchanged. On balance, the refinements leave the economic effects of Option A substantially unchanged. The slight reductions in cumulative operations activity and in the total amount of waste that customers can dispose of locally are offset by enhanced agricultural end-use opportunities and a reduced potential for nuisance-related effects on businesses and property values.

1.2 Description of the Preferred Leachate Management Option

Leachate Management Option A builds upon the pre-existing leachate management system and approach while including the necessary expansion of the system capacity to manage the additional leachate generated by South Landfill Phase 2. As evaluated in the Alternative Methods phase, the expansion comprised a leachate sump, including a pump station equipped with the needed metering equipment and controls for monitoring and contingency purposes, a forcemain to transport the leachate from the pump station to the lagoon area, and a potential third on-site lagoon for pretreatment and eventual discharge, based on the approximate leachate generation rates described in the FCR. Following the selection of the Preferred Method, detailed predictive modelling incorporating climate change considerations refined the expected annual leachate volumes, which are now predicted to increase from approximately 30,000 m³ in the first year of landfilling to approximately 131,000 m³ at the end of the operating period, reaching approximately 147,000 m³ twenty years post-closure. To manage these volumes and to address occasional exceedances of Total Kjeldahl Nitrogen and Chemical Oxygen Demand under the Niagara Region Sewer-Use By-Law, the design of the pre-treatment modifications was confirmed and expanded. Rather than a single potential third lagoon, two new lagoons, similar in size to and located south of the existing two lagoons (approximate dimensions of 70 m x 45 m), will be constructed, with the resulting four lagoons optimized to provide aerobic (two lagoons) and anoxic (two lagoons) treatment, together with a new air circulation building and a new solids management building housing enclosed bins for activated sludge.

Once pretreated at the on-site lagoons, leachate will be conveyed via a force/gravity main to the Niagara-on-the-Lake sanitary sewer system for final treatment at the Region of Niagara's Port Weller Wastewater Treatment Plant. The existing force/gravity main will require upgrades to accommodate the additional leachate flows from South Landfill Phase 2, consisting of replacement and upsizing of the existing main along the existing alignment.

From the Economics perspective, these adjustments reflect updated leachate volume predictions and a modest expansion of the on-site construction scope relative to the design evaluated in the Alternative Methods phase, and they do not alter the economic basis on which Leachate Management Option A was identified as preferred. The expanded pre-treatment works and the replacement and upsizing of the force/gravity main increase construction-related business opportunities and the associated direct, indirect, and induced employment and GDP contributions, though these effects remain construction-phase in nature and modest in scale. The higher predicted leachate volumes increase the municipal revenue generated through volumetric charges for leachate discharged to the sanitary sewer system; however, because the municipal costs of conveying and treating leachate rise with the same volumes, the net effect on municipal finances remains essentially as evaluated, while the new pre-treatment infrastructure may marginally increase the assessed value of the Walker property and the associated property tax revenue. As the works are located on-site adjacent to the existing lagoons, the conclusion of no effect on property values is unchanged. The conclusion of little to no effect on the customer cost of waste services also holds, as the construction costs are modest and would not require recovery through higher tipping fees.

1.3 Facility Characteristic Report for the Preferred Method

The Facility Characteristics Report (FCR) presents preliminary design and operations information for the Preferred Method and provides information on all main aspects of landfill design and operations including the following items relevant to the economics assessment:

- Site layout design, including existing and proposed Site characteristics;
- Leachate management;
- Buildings and structures;
- Landfill development sequence and daily operations.

The FCR also provides estimates of parameters relevant to the detailed impact assessment, including estimates of leachate generation and employment. Walker provided supplemental information to the FCR regarding itemized operations and capital costs for the project.

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.

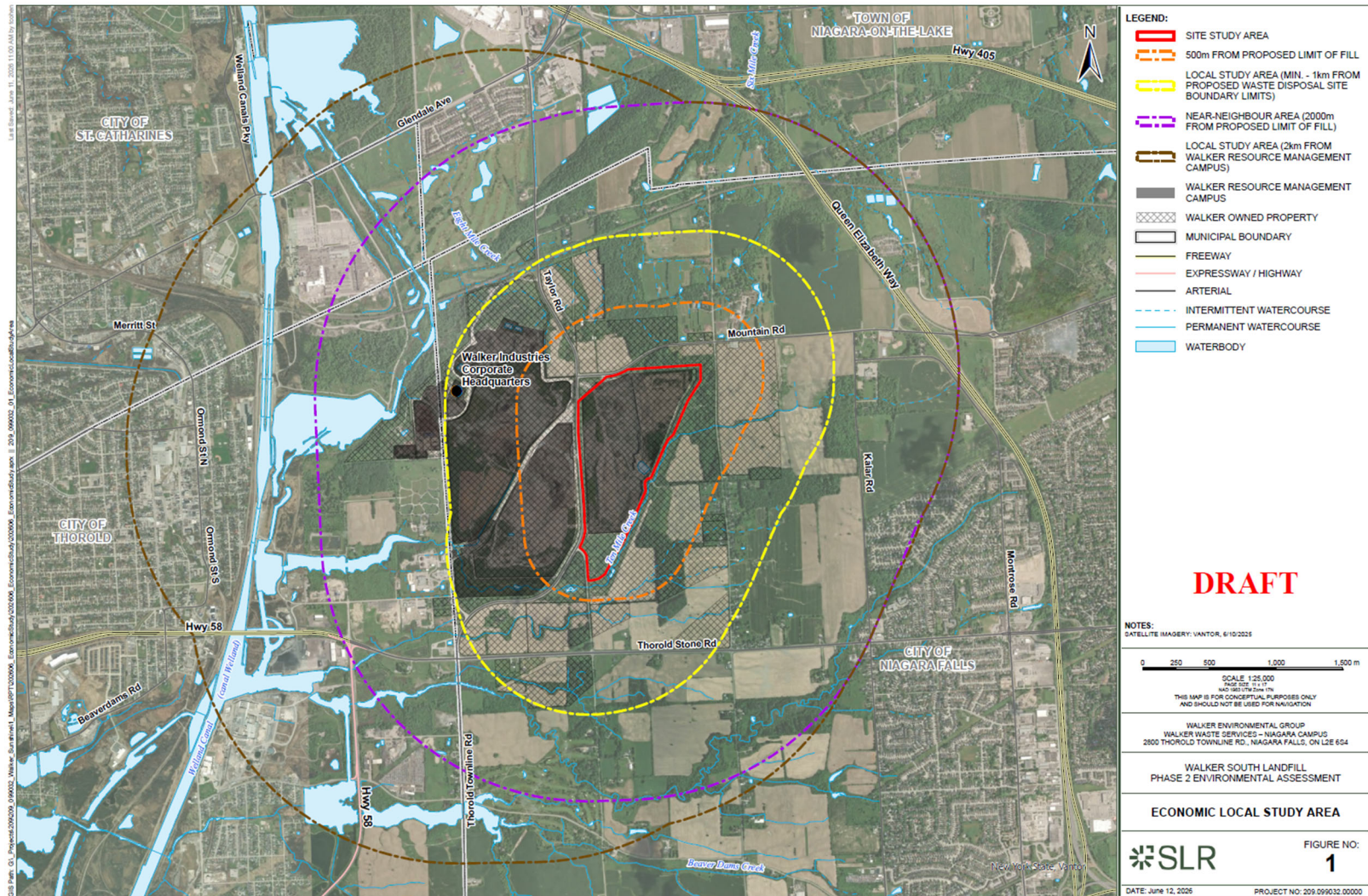
The LSA encompasses the four lower-tier municipalities within proximity of the Walker Resource Management Campus. The inclusion of the City of Niagara Falls, Town of Niagara-on-the-Lake, City of St. Catharines, and City of Thorold ensures that effects on the local economy and public finance are assessed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

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. Study Methodologies

3.1 Assessment Approach and Confirmation of Effects

The assessment of impacts associated with the Preferred Method was undertaken through a series of steps that were based, in part, on a number of previously prepared reports (Economic Existing Conditions Report, Economic Comparative Evaluation Technical Memorandum). The net effects associated with the three Alternative Landfill Configuration Options and two Alternative Leachate Management Options identified during the Alternative Methods phase of the EA were based on conceptual designs. These effects were reviewed within the context of the preliminary design plans developed for the Preferred Method, as identified in the FCR, to determine the type and extent of any additional investigations required to ensure a comprehensive assessment of net effects. Additional investigations were then carried out, where necessary, in order to augment the previous work undertaken. Feedback previously received from the EA consultation process was incorporated into the assessment approach, where appropriate.

With these additional investigations in mind, the potential impacts on the Economic environment of the Preferred Method were documented.

With a more detailed understanding of the potential impact from the preliminary landfill and leachate treatment designs on the Economic environment, the previously identified potential effects and recommended mitigation or compensation measures associated with the Preferred Method (documented in the Economic Comparative Evaluation Technical Memorandum) were reviewed to ensure their accuracy. Based on this review, the potential effects, mitigation or compensation measures, and net effects associated with the Preferred Method were confirmed and documented. In addition to identifying mitigation or compensation measures, potential enhancement opportunities associated with the preliminary design for the Preferred Method were also identified, where possible.

Following this confirmatory exercise, the requirement for monitoring in relation to net effects was identified, where appropriate. Finally, any Economic approvals required as part of the implementation of the Preferred Method were identified.

3.2 Additional Investigations

Upon completion of the preliminary design for the Preferred Method as documented in the FCR, the environmental characteristics of the Study Area were reviewed to verify the accuracy of the assessment of net effects from the Preferred Method. From this review, it was determined that no additional investigations of the Study Area were needed. The FCR, however, documented design refinements with economic relevance relative to the conceptual designs evaluated during the Alternative Methods phase, including updated predicted leachate volumes, a revised landfill capacity, and new structures and site infrastructure with property assessment implications. To incorporate these refinements into the assessment, supplementary information was obtained from

Walker, including itemized capital and annual operating expenditures in support of the input-output economic modelling and the municipal finance assessment.

3.3 Effects Assessment Methodologies

3.3.1 Approach and Methodology

The economic impact assessment has been prepared in accordance with the Approved ToR and follows a net effects analysis approach: the established evaluation criteria, indicators, and measures were applied to identify the potential effects of the Preferred Method on the economic environment, develop impact management measures to avoid or mitigate adverse effects, and determine the net effects that may remain after the application of those measures.

Effects may be assessed relative to two baseline states: the existing condition, reflecting current operations at the Walker Campus (South Landfill Phase 1 and the Southeast Quarry); and the future existing condition (the Do Nothing option), reflecting the approved post-extraction land use that would exist if the proposed undertaking were not developed. Distinguishing the two allows changes attributable to the project to be separated from changes that would occur in its absence.

The future existing condition was characterised over the project's operating life to a 2051 planning horizon, consistent with the growth forecasts of the Niagara Region Official Plan. For the local economy, the characterisation draws on the Official Plan employment forecasts and the Region's Development Charges Background Study, the Region's economic development strategy and announced anchor investments, and interviews with business and economic development representatives. The property values outlook is based on CMHC's Housing Market Outlook and Ontario housing supply analyses. For public finance, municipal revenue and expenditure under forecast household growth were projected using the per-household method described under Public Finance below, alongside the contraction of the Walker site's own assessment, tax, and discharge-fee contribution following closure and rehabilitation. The cost of services future baseline reflects the closure of the South Landfill on reaching capacity and the redirection of affected waste streams, quantified as described under Cost of Services below. Future nuisance conditions at the common receptor locations were taken from the discipline study predictions for the Do Nothing scenario.

The assessment addresses the four evaluation criteria and associated indicators established in the ToR, presented in **Table 1**.

Table 1: Evaluation Criteria and Indicators – Economic Environment

Evaluation Criteria	Indicators
Effect on Local Economy	Impact on businesses: – Disruption/displacement of businesses (including tourism and farms) – Business opportunities Labour market impacts: – Impact on direct, indirect, and induced employment GDP impacts: – Impact on direct, indirect, and induced GDP – Retention of economic benefits within local economy
Effect on Real Estate	Property value impacts
Effect on Public Finance	Impact on municipal revenue Impacts on municipal cost Impact on assessment base
Cost of Services	Impact on customer cost of waste services

3.3.2 Application of Discipline Study Predictions

Predictions from the air quality, odour, noise, transportation, and visual discipline studies were applied in the assessment of the disruption of businesses indicator (including tourism businesses and farms), under the effect on local economy criterion.

The discipline study predictions were compiled at individual receptor locations in the LSA for four scenarios that reflect the staged evolution of operations at the Walker Campus, together with the Do Nothing condition, which serves as a future no-build comparator presented in **Table 2**. These scenarios follow the staged operating conditions modelled in the air quality and the noise and vibration design impact assessments, from which the dust, odour, and noise predictions were drawn, with the stage designations (End of Stage 1, 3, and 4) following the air quality assessment. Where the noise assessment modelled two sub-stages within the Impact 2 period (Stage 2, when the quarry ceases, and End of Stage 3), the tables report the higher of the two values for each noise metric under Impact 2. Traffic was modelled at horizon years of 2028, 2031, 2034, and 2036, presented under the Baseline, Impact 1, Impact 2, and Impact 3 scenarios respectively. For each receptor and scenario, the predictions comprise dust, odour, noise, traffic, and visual effects. Do Nothing predictions are reported for dust, odour, and continuous sound; Walker traffic is not generated under this condition.

Table 2: Receptor Prediction Scenarios

Scenario	Description
Baseline	Existing conditions, with South Landfill Phase 1 and the Southeast Quarry operating together and South Landfill Phase 2 not yet developed.
Do Nothing	Future condition without the undertaking: South Landfill Phase 2 is not developed, South Landfill Phase 1 closes and is capped on reaching capacity, and the Southeast Quarry completes extraction and is rehabilitated, with nuisance values declining to the residual levels of the continuing campus operations. Presented as a comparator rather than an assessment scenario.

Scenario	Description
Impact Scenario 1	End of Stage 1: closure of the existing South Landfill (Phase 1) and commencement of South Landfill Phase 2 Stage 1 filling, with the Southeast Quarry still operating.
Impact Scenario 2	South Landfill Phase 2 filling operations with the Southeast Quarry no longer operating (Stage 2 to End of Stage 3). Predicted values represent the worst case across this operating period.
Impact Scenario 3	End of Stage 4: the final operating stage, when South Landfill Phase 2 reaches its maximum filling extent and peak landform.

Predicted values under each impact scenario were compared against the baseline scenario and against the applicable regulatory thresholds to identify new threshold exceedances, changes to existing exceedances, and below-threshold changes at each receptor. These receptor-level results support the identification of businesses that may experience nuisance-related disruption. The predictions represent maximum predicted values at each receptor and are conservative; actual effects may vary among individual businesses within a given receptor location.

3.3.3 Integration of Discipline Study Findings

In addition to the receptor-level predictions described above, the findings of the Agricultural Impact Assessment were integrated into the economic assessment. The Agricultural Impact Assessment informed the characterisation of agricultural conditions within and surrounding the expansion footprint and the assessment of effects on the future agricultural end use of the Site. As the footprint comprises the existing quarry and soil stockpiles, with no agricultural uses present, the assessment of effects on agriculture draws on the Agricultural Impact Assessment findings rather than on receptor-level predictions.

The SLR Site Neighbour Survey informed the characterisation of baseline nuisance conditions and the identification of home-based businesses in the LSA.

3.3.4 Local Economy

3.3.4.1 Input-Output Economic Modelling

The economic effects of the proposed South Landfill Phase 2 project were estimated for the Ontario-allocated portion of Walker's itemized capital and annual operating expenditures, using Statistics Canada's most recent Ontario input-output multipliers (2022 release) (Statistics Canada, 2025a). Input-output models measure how spending in one sector ripples through the broader economy. They capture:

- **Direct impacts** – the immediate effects of sector spending;
- **Indirect impacts** – supply chain effects as industries provide goods and services to support direct activity spending; and
- **Induced impacts** – household spending that results from wages earned in direct and indirect activities.

The sum of direct, indirect, and induced effects represents the total economic impact. Impacts are reported for GDP, labour income, employment, and tax revenues. Ontario provincial multipliers were used to capture impacts within the province. Expenditures were allocated to one of four discrete geographies based on the geography of spending and employee place of residence; only those allocated to Ontario entered the input-output analysis.

For most operating and capital expenditures, Walker disaggregated each line item into a labour component and a non-labour component (materials, goods, and services). Walker also provided full-time equivalent (FTE) headcounts for some operating line items. Where an FTE count was provided it was used directly as the direct employment value; otherwise direct employment was derived from the labour budget as described below.

Each line item was assigned to one of four discrete geographies (the LSA; the RSA outside the LSA; the rest of Ontario outside the LSA and RSA; or other provinces and the United States) based on the location of current suppliers and input from Walker. Each line item was also assigned to the Statistics Canada input-output industry classification that most closely corresponded to the underlying expenditure.

Three adjustments were then applied. The first reconciles a difference in price years: Walker's expenditures are in 2026 dollars while the multipliers are in 2022 dollars, so the employment multipliers were scaled to 2026 levels. Because employment equals labour income divided by the prevailing wage, direct employment was scaled by the ratio of the 2022 to 2026 average annual wage for the corresponding industry, and indirect and induced employment, which arise across the broader supply chain and consumer economy rather than within the purchased industry, were scaled by the ratio of the 2022 to 2026 average annual wage for all industries, using the wage data described below. The resulting deflator factors were applied to the corresponding employment multipliers.

The second adjustment applies to Walker's own employees. Because wages paid to Walker staff are themselves value added, the labour income of Walker's direct labour and supervisory and administrative employees was counted directly as direct GDP, with no indirect effects; induced effects were estimated by expressing the induced multipliers per dollar of labour income.

The third adjustment applies to Walker's own direct labour. Where Walker provided a full-time-equivalent (FTE) count for a budget line, that count is used directly in place of the multiplier-derived direct employment.

The 2022 and 2026 average annual wages were taken from Statistics Canada Table 14-10-0064-01, Employee wages by industry, annual (Statistics Canada, 2026a): the average annual wage for the corresponding industry for direct employment, and the all-industries average for indirect and induced employment. These are the summary annual averages by industry, with the annual wage taken as average weekly earnings multiplied by 52. Actual data are used through 2025, and the 2026 wage is forecast by applying the 2024-to-2025 compound annual growth rate to the 2025 value.

All other capital and operating expenditures, including subcontracted labour, were treated as purchases of supplier output and multiplied at full value by the standard output-based multipliers.

Because personal income taxes are not captured in input–output model results, they were calculated separately using effective tax rates for 2022 published by Statistics Canada, 17.44% for Ontario (Statistics Canada, 2026b), applied to labour income.

The total Ontario direct, indirect, and induced effects were then geographically allocated within Ontario across three geographies: LSA, RSA, and Ontario. Different allocation rules apply depending on the effect type, as described below.

Direct effects associated with labour (FTE jobs, labour income, and personal income tax) were allocated by place of residence (POR). For budget items corresponding to direct labour employed by Walker, POR was based on Walker's own records for current South Landfill employees. For employees of suppliers located within the LSA or RSA, POR was determined using commuting flow data from Statistics Canada (Statistics Canada, 2022a). Workers employed at suppliers in Ontario outside the LSA and RSA are assumed to reside entirely within Ontario.

Direct GDP was allocated based on the location of the supplier providing the good or service associated with each budget item and remains at the supplier's place of work (POW); it is not reallocated to workers' POR. FTE jobs, labour income, and personal income tax are reported on a POR basis, as described above, and may therefore appear in a geography different from the supplier itself. Direct product and production taxes were allocated in the same proportions as direct GDP.

Indirect GDP was allocated using 2023 Lightcast Industry Supply Chain data (Lightcast, 2026), which provides, for each budget item's NAICS industry, the share of supplier purchases sourced from within the LSA and from within the RSA. The LSA share was taken as the greater of the industry's overall in-region purchase share and its LSA-specific share, because Walker places project spend with known LSA suppliers rather than at industry-average leakage rates. Indirect product and production taxes were allocated in the same proportions as indirect GDP. Indirect FTE jobs, labour income, and personal income tax were then reallocated to workers' POR using the commuting flows consistent with the direct labour-side treatment described above. Workers at suppliers outside the LSA and RSA are assumed to reside within Ontario.

Induced effects were allocated based on the geographic distribution of POR labour income. For each geography, the induced allocation factor was calculated as the share of total Ontario direct and indirect labour income that had been allocated to that geography on a POR basis under the rules above, reflecting that induced effects arise from re-spending of household earnings at workers' POR and therefore follow those earnings.

For reporting purposes, the resulting effects are presented cumulatively: the LSA total is reported on its own, the RSA total is reported inclusive of the LSA, and the Ontario total is reported inclusive of both.

3.3.4.2 Household Spending Allocation

The distribution of consumption arising from project-attributable labour income was estimated using the Ontario household expenditure profile presented under Local Economy in the Existing Conditions Report. The profile aggregates Statistics Canada's detailed expenditure data into nine categories of consumption spending: Food; Shelter; Household operations and furnishings; Clothing and accessories; Transportation; Health and personal care; Recreation; Education; and Other.

Project-attributable consumption spending was calculated for each geography (LSA, RSA, and Ontario) in two steps. Gross labour income from the input-output model was first reduced to after-tax income by removing personal income tax at the 17.44% effective rate described previously. After-tax income was then reduced by a further 9% to account for personal insurance and pension contributions and for gifts and charitable contributions, which represent uses of household income other than consumption (Statistics Canada, 2026c). The remainder was distributed across the nine categories of consumption spending using the Ontario percentage profile.

This approach assumes that each additional dollar of project-generated labour income is spent in the same proportions as the average Ontario household, and that the share of after-tax income directed to insurance, pensions, gifts, and charitable contributions also follows the provincial average. Spending patterns in the LSA and RSA may differ from the Ontario average for the reasons noted under Data Limitations in the Existing Conditions Report.

3.3.5 Property Values

Property values were assessed at two levels: the broader real estate market, using quarterly market indicators for the LSA and RSA, and individual transactions within the study area, comparing sales in neighbourhoods near the site against control areas farther away. The market-level comparison establishes the regional conditions against which the transaction-level results are read.

3.3.5.1 Real Estate Market

The effects assessment examined whether the LSA's real estate market diverged from the RSA's after the project announcement on November 30, 2023. Quarterly detached home sales, average sale prices, and sales-to-new-listings ratios for both geographies were compiled from Toronto Regional Real Estate Board (TRREB) data covering Q4 2022 through Q3 2025 (Toronto Regional Real Estate Board, 2025). The four quarters preceding the announcement (Q4 2022 through Q3 2023) established the variation between the LSA and RSA before the announcement, and post-announcement quarters were compared against those patterns, with Q4 2023 treated as a transition quarter straddling the announcement date. Market commentary from Niagara

Association of REALTORS® monthly reports (2024a) (2024b) (Niagara Association of Realtors, 2025) provided regional context for the period that followed. Interviews with two real estate professionals active in the study area addressed whether existing operations and the proposed expansion have affected supply, demand, pricing, days on market, or property values.

3.3.5.2 Property Values Analysis

The relationship between the landfill announcement and housing prices was assessed by comparing sales in four LSA neighbourhoods, delineated in the Existing Conditions Report with reference to municipal boundaries, roads, and physical features, against corresponding control areas selected for similar character and exposure to the same regional market forces but located farther from the landfill site. For each pairing, sales were screened to a common lot-size range, with the specific thresholds described alongside each comparison; the comparability of the two areas was then tested on sale timing and lot size. Prices were analysed on a price-per-square-foot basis (sale price divided by lot area in square feet), which normalises for lot-size differences between properties.

The neighbourhood boundaries adopted from the Existing Conditions Report are as follows. The LSA rural residential area comprises single-family rural residential properties on lots of five acres or less located to the south, north, and east of the Walker Resource Management Campus within the 2-kilometre LSA, more than 100 metres from the urban fringe, including lands within the City of Niagara Falls's Northwest Secondary Plan area. The Mount Carmel sample is drawn from the relatively uniform interior residential portion of the neighbourhood set back from Kalar Road, bounded by Shriner's Woodlot Park to the south and the agricultural fields of the Northwest Secondary Plan area to the north. Niagara-on-the-Green is bounded by Glendale Avenue to the north, Taylor Road to the west, and the Royal Niagara Golf Club to the south. Downtown Thorold and Merritton St. Catharines comprises the established urban residential area immediately west of the Welland Canal within the 2-kilometre LSA.

Two regression tests were applied to each pairing, each answering a different question. The first test asks whether the study area and its control area priced differently within a given period. Price per square foot was regressed on the date of sale and an indicator variable marking sales in the control area, separately for the pre-announcement and post-announcement periods. The coefficient on this indicator measures the pricing gap between the two areas once the timing of sales is controlled for; a positive coefficient indicates higher prices in the control area. Because each sale is benchmarked to the market level at its sale date, it does not matter that the two areas' sales occurred at different times.

The second test, a difference-in-differences (DID) regression, is the primary test of whether the announcement itself changed prices. It adds a post-announcement indicator and an interaction between the control-area indicator and the post-announcement period. The interaction coefficient measures whether the pricing gap between the areas widened or narrowed after the announcement; a positive interaction indicates that control-area prices rose relative to the study area. The two areas do not need to be identical beforehand; the test detects a change in the gap,

whatever its starting level. For both tests, a result is treated as statistically significant when its p-value is below 0.05, meaning a difference that large would be unlikely to arise by chance.

The analysis included sales of single-family residential properties. Actual historical sale prices between January 2009 and February 2026 were used in the assessment (Geowarehouse, 2026). Results are presented for each LSA neighbourhood and its corresponding control area. Results are presented for two periods: the pre-announcement period (January 1, 2009 to November 29, 2023) and the post-announcement period (November 30, 2023 to February 2026).

Two additional areas were excluded from statistical testing: Thorold South (12 detached sales between 2012 and 2025, one occurring after the announcement) and the Mount Carmel urban-boundary cluster fronting Kalar Road and Vegter Court, described in the Existing Conditions Report (14 sales involving 11 properties, none after the announcement). Neither area provides sufficient post-announcement transactions to support a pre/post comparison.

Where a DID test returned a statistically significant result, follow-up checks were used to establish whether the change began with the announcement or was already underway beforehand. The annual price history of the two areas was examined across the full study period, and a structural break test identified the year the divergence began. A placebo test re-ran the DID using fictitious announcement dates. If invented dates produce apparent effects just as the real date does, the divergence reflects a longer-running trend rather than the announcement; this is the check on the parallel-trends assumption that DID relies on. A restricted DID repeated the test using progressively shorter pre-announcement periods, excluding any divergence from earlier years; if the announcement caused the change, the effect should persist or strengthen as the comparison narrows to recent years. Finally, the affected neighbourhood's own price series was tested for a shift at the announcement date, independently of any comparison area.

Potential property value effects during the operating phase were assessed by combining three lines of evidence. The first is the receptor screening: the discipline study predictions of dust, odour, noise, traffic, and visual conditions at the residential receptors, compiled as described under Application of Discipline Study Predictions, which identify where operating conditions would depart from those experienced today. The second is the operating record of the existing South Landfill: the pre-announcement comparisons, spanning Phase 1's operating life from its opening in 2009 to the announcement, show whether the market priced properties near the site differently from their control areas while the landfill operated, supplemented by the real estate professional interviews. The third is the announcement analyses described above, which test whether the prospect of Phase 2 itself changed that pricing. Together, the three lines establish whether the predicted operating-phase nuisance environment falls within the range the market has already experienced and priced into current values.

3.3.6 Public Finance

The effects of the proposed South Landfill Phase 2 on public finance were assessed as the project's contribution to the finances of the municipalities and taxing authorities affected by the facility. The assessment was prepared in a single linked model that estimates each effect in turn and

consolidates the results by recipient and project phase: operations, and closure and post-closure. It covers three components:

- the value the project adds to the municipal assessment base;
- the property tax and leachate-treatment-fee revenue it generates; and
- the incremental cost it imposes on the regional wastewater system.

Each component feeds the next. The assessment base drives the property tax estimate, and the estimated leachate volumes drive both the treatment-fee revenue and the corresponding treatment cost.

Municipal costs other than wastewater treatment, principally general wear on municipal infrastructure from facility-related heavy vehicle traffic, were considered qualitatively. This cost is acknowledged in the assessment but is not independently quantified.

3.3.6.1 Assessment Base

The facility was first divided into its physical components, and each was assigned to the Ontario property class that governs how it is assessed, following the Assessment Act (R.S.O. 1990, c. A.31.), Ontario Regulation 282/98, and the assessment practices of the Municipal Property Assessment Corporation (MPAC) (Ontario, 1990; Ontario, 1998a). Three classes apply: a Landfill class for the site lands, an Industrial class for the assessable buildings, and a Pipeline class for the linear conveyances. Classification also determines what is excluded. Under MPAC's methodology the engineered components of the waste-disposal operation are treated as part of the operation rather than as assessable improvements, and do not enter the assessment base. These are the liner systems, the leachate and landfill-gas collection systems, and the progressive cell construction, the single largest category of capital expenditure. Of the built works, only the building shells and the linear pipeline are assessed; the process equipment they house is not.

MPAC assesses property as of a fixed statutory valuation date rather than at current prices. Walker's construction-cost inputs for the Industrial and Pipeline classes, which are expressed in current dollars, were therefore restated to that valuation date using the Non-Residential Building Construction Price Index for Toronto published by Statistics Canada (NRBCPI) (2022b) (2024) (2026d). Because the index has been rebased since the valuation date, the published series were chain-linked through their overlapping reference quarters onto a single consistent base, and an adjustment factor was formed as the ratio of the index at the valuation date to the index at the cost-estimate date. That factor was applied to the current-dollar costs of the Industrial and Pipeline classes. The Landfill class, assessed from land value rather than construction cost, was not adjusted in this way.

The Landfill class was assessed from the area of the site rather than the capital invested in it. The assessable area was taken from Walker's facility characteristics documentation (WSP Canada, 2026) and valued at a per-hectare market land value drawn from the published range of industrial land values for the Niagara region; that market value was converted to an assessed value using an

assessment-to-market ratio reflecting the relationship between MPAC assessed values and market values for comparable industrial land. Because the assessable acreage is established when the site is created and does not change as waste is placed, the Landfill-class value is held constant throughout the operating and post-closure life of the facility. It is the dominant and most stable element of the assessment base.

The Industrial class was assessed from the construction cost of the assessable buildings, restated to the valuation date using the adjustment factor described above. Walker provided the building inventory and cost inputs. The buildings are recognised only while they are in service. They are assessed at full value through operations, and at closure the structures that are decommissioned come off the roll while those retained for post-closure environmental management remain assessed. The Industrial class therefore contributes principally during operations, with a reduced contribution thereafter.

The Pipeline class was assessed from the replacement cost of the assessable segments, derived from their length and a per-metre replacement rate and restated to the valuation date using the same adjustment factor. The pipelines are assessed once placed in service and remain on the roll for as long as they operate; because leachate conveyance and gas collection continue after the facility stops receiving waste, the pipeline contribution persists through closure and post-closure.

The three classes were then combined to give the total assessment base in each phase, reflecting the points at which each class enters and leaves the roll. This phased assessment base is the input to the property tax estimate.

3.3.6.2 Municipal Revenue

The project generates municipal revenue through two channels, estimated separately and then consolidated by recipient and phase: property taxation on the assessment base, and a fee for the municipal treatment of leachate.

3.3.6.3 Property Taxation

Property tax revenue was estimated by applying the effective tax rate for each property class to that class's assessed value in each phase. The effective rate for a class is the sum of the lower-tier (municipal), upper-tier (regional), and education levies. For the municipal and regional levies, the residential rate set by by-law was scaled by the tax ratio the municipality assigns to each non-residential class, so that each class carries its prescribed multiple of the residential rate; the education levy was applied at the rate set by provincial regulation (Niagara Region, 2025a; Niagara Region, 2024a; Ontario, 1998b; Ontario, 2024). The resulting class rates were applied to the corresponding assessed values, and the revenue apportioned among the three recipients: the lower-tier municipality, the upper-tier Region, and the Province through the education levy. Rates were held constant in real terms across the project life, so that the estimate reflects movements in the assessment base rather than assumptions about future rate-setting.

3.3.6.4 Leachate Treatment Fee for Service

The leachate treatment fee was estimated as the volume of leachate discharged to the municipal system in each phase, multiplied by the per-cubic-metre charge for treating it. Discharge volumes were taken from Walker's estimated leachate-generation profile and averaged within each phase; because leachate continues to be generated after the facility closes, this revenue extends through closure and post-closure. The charge comprises two components: a base volumetric rate, set to the current cost of treating a cubic metre of wastewater, and an overstrength surcharge for leachate whose strength exceeds the receiving system's sewer-use limits. The surcharge is derived by comparing the estimated contaminant concentrations against the Niagara Region limits and charging any exceedance at the by-law's per-kilogram surcharge rate (Niagara Region, 2024b; Niagara Region, 2026). The assessment assumes that Walker pre-treats the leachate on site to meet those limits, so that no exceedance arises and the base volumetric rate is the effective charge.

3.3.6.5 Wastewater Treatment Cost

The municipal cost the assessment quantifies is the incremental burden that the project's leachate places on the regional wastewater system, estimated on a marginal rather than an average basis. The Region's average budgetary cost of treating a cubic metre of wastewater includes a large fixed component (labour, debt servicing, administration, and infrastructure maintenance) that does not vary with the volume treated; only a small variable component, principally chemicals and pumping energy, changes when an additional cubic metre is processed (Niagara Region, 2025b; Niagara Region, 2025c; Niagara Region, 2025d). The incremental cost of the project's leachate was therefore based on the variable share of the per-cubic-metre cost rather than the full average. The leachate volume is a very small fraction of the regional system's total throughput. It requires no capacity expansion or capital investment and is absorbed within the system's existing design parameters. The estimate was further qualified by the Region's billing practice, under which lower-tier municipalities are charged on a lump-sum basis derived from a multi-year rolling average of flows, so that the cost of an additional volume is deferred and smoothed rather than felt in the year it arises.

3.3.6.6 Future Baseline: Municipal Revenue and Expenditure

The future baseline projects the municipal revenue and operating expenditure of the local study area (LSA) municipalities to 2051, before any effect of the project, using each municipality's current financial return and Niagara Region's long-range household forecasts. It estimates the fiscal effect of forecast household growth alone and provides the reference against which the project's public-finance effects are assessed.

Municipal revenue and the cost of municipal services both scale, in the first instance, with the number of households a municipality serves. The baseline uses that relationship. It measures what each municipality currently raises and spends per household, and applies those amounts to the number of new households the area is forecast to add. It is prepared for the four LSA

municipalities (Niagara Falls, Niagara-on-the-Lake, St. Catharines, and Thorold) and for the LSA as a whole.

The projection is built in three steps. First, the current revenue and expenditure of each municipality were taken from its 2024 Financial Information Return (FIR) (Government of Ontario - Ministry of Municipal Affairs and Housing, 2025). Revenues and expenditures were summed to annual totals and the four LSA municipalities were combined to an LSA total. Second, household counts for the base year (2024) were taken from the same FIRs and projected to 2051 using the Niagara Region's growth forecasts (Niagara Region, 2022a). The new households expected by 2051 were calculated for each municipality as the 2051 forecast less the 2024 base. Third, each municipality's 2024 totals were divided by its 2024 household count to give revenue and expenditure per household. These per-household amounts were multiplied by the number of new households to give the projected revenue and expenditure from growth, and projected expenditure was subtracted from projected revenue to give the net result for each municipality and the LSA.

The projection assumes that each new household adds municipal revenue and operating expenditure at the municipality's current average per-household rate, held constant in 2024 dollars with no inflation adjustment. It isolates the fiscal effect of forecast household growth and does not include any revenue or cost arising from the project itself.

3.3.7 Cost of Services

The cost of services assessment evaluates the effect of the future baseline (Do Nothing) scenario on the cost of waste disposal for customers currently served by Walker's South Landfill. If the South Landfill reaches its permitted capacity and closes without replacement, three customer segments would be affected: industrial, commercial, and institutional (IC&I) generators, self-haul customers, and the Region of Niagara under its waste disposal partnership agreement with Walker.

For IC&I generators and the Region of Niagara, the delivered cost of redirecting waste to alternative disposal facilities in Ontario and the United States was estimated and compared against current disposal costs. Cost components included tipping fees, transfer station processing, haulage based on drive time and a per-hour rate, and international bridge tolls for US alternatives, with currency conversions applied where applicable. For the Region, redirection of curbside volumes to its own Humberstone Road Landfill was also assessed, using the Region's full cost recovery rate and the effect of the additional volume on that landfill's remaining capacity. For self-haul customers, the assessment examined whether depot access and pricing would change under the future baseline scenario.

The aggregate annual cost of the Do Nothing scenario was quantified by projecting the affected tonnages to 2031, the first full operating year of the proposed landfill (WSP Canada, 2026). IC&I tonnage was projected on a per-employee basis. Current IC&I receipts were divided by Niagara Region employment in the same year to derive a tonnes-per-employee rate, which was applied to projected 2031 regional employment. Municipal curbside tonnage was projected on a per-capita basis: Walker's curbside receipts were divided by the combined population of the fully-served partnership municipalities (St. Catharines, Thorold, and Niagara-on-the-Lake) in the corresponding

data year, and the resulting rate was applied to the projected 2031 population of those municipalities. Niagara Falls was excluded from the population base because only select collection routes are served under the partnership agreement. Employment was projected at a constant compound annual growth rate between the 2021 base and 2051 forecast values adopted in the Niagara Region growth forecasts (Niagara Region, 2021) (Niagara Region, 2022a). Population was projected to 2031 from the 2024 base recorded in the municipal FIRs, at the constant growth rate implied by that base and the 2051 forecast. The self-haul stream is excluded from the analysis because the drop-off depot would continue to operate under the Do Nothing scenario.

3.3.8 Climate Change Considerations

The avoided transportation emissions presented in the Climate Change Considerations section were quantified on the same basis as the Cost of Services assessment. The projected 2031 tonnages redirected under the Do Nothing scenario, the 38-tonne transfer-trailer capacity, and the haul distances to the five accessible alternative landfills were taken directly from the cost-to-customer analysis, and the resulting annual truck-kilometres were converted to diesel consumption using the Natural Resources Canada average fuel intensity for heavy-duty tractor-trailers (Natural Resources Canada, 2024) and to carbon dioxide equivalent emissions using Environment and Climate Change Canada National Inventory Report combustion factors for heavy-duty diesel vehicles (Environment and Climate Change Canada, 2026). The incremental movement is the long-haul leg between the region and the alternative landfill.

3.4 Data Sources

The data collection program supporting this assessment, comprising field reconnaissance, the structured interview program, and the identification of study area businesses, together with the secondary sources used to characterise baseline conditions, is documented in the Economic Existing Conditions Report (Avaanz Ltd., 2026a). Interview findings cited in this report were drawn from that program. The interview request letters and accompanying project information booklet are provided in **Appendix B**, and the interview plan and guides are provided in **Appendix C**. The existing conditions presented in this report are summarised from the Economic Existing Conditions Report and, where noted, from the existing conditions reports of the other EA disciplines. Those reports document the underlying data and sources in full; citations are repeated here only where a specific document is directly referenced. The effects assessment draws on the following additional sources, organised by evaluation criterion; all sources are cited where used and listed in the References section.

3.4.1 Project and Discipline Study Inputs

- ◆ Facility Characteristics Report (WSP Canada) – preliminary design, site infrastructure, capacity, and assessable building inputs
- ◆ Walker – itemised capital and operating expenditures, leachate generation profile, and cost input

- ◆ Discipline impact assessments – air quality, noise and vibration, transportation, and visual predictions at the common receptor locations; Agricultural Impact Assessment findings; SLR Site Neighbour Survey tabulated results

3.4.2 Local Economy

- ◆ Statistics Canada – input-output multipliers (Table 36-10-0594-01)
- ◆ Statistics Canada – employee wages by industry, including the all-industries average (Table 14-10-0064-01)
- ◆ Statistics Canada – federal and provincial individual effective tax rates (Table 11-10-0054-01)
- ◆ Statistics Canada – household spending, Canada, regions and provinces (Table 11-10-0222-01)
- ◆ Statistics Canada – commuting flow, census subdivisions (Table 98-10-0459-01)
- ◆ Lightcast – Industry Supply Chain, Q1 2026 data set

3.4.3 Property Values

- ◆ Toronto Regional Real Estate Board – quarterly community sales reports
- ◆ Geowarehouse (Teranet) – residential sales records, January 2009 to February 2026
- ◆ Niagara Association of REALTORS® – monthly media releases
- ◆ CMHC Housing Market Outlook and Smart Prosperity Institute housing supply analyses – future baseline outlook

3.4.4 Public Finance

- ◆ Assessment Act, R.S.O. 1990, c. A.31; Ontario Regulations 282/98 and 400/98; MPAC assessment practices
- ◆ Statistics Canada – building construction price indexes used for valuation date restatement
- ◆ CBRE Canada – Niagara Region industrial land values
- ◆ Niagara Region by-laws and reports – tax ratios and tax rates, sewer discharge regulation, wastewater budgets, and annual wastewater performance reporting
- ◆ Ontario FIRs (2024) and Niagara Region growth allocations

3.4.5 Cost of Services

- ◆ Niagara Region tipping fees and the GHD Waste Management Strategic Plan

3.4.6 Climate Change

- ◆ Natural Resources Canada Comprehensive Energy Use Database and Environment and Climate Change Canada National Inventory Report emission factors

- ◆ Ministry of the Environment, Conservation and Parks climate change guidance and Toronto and Region Conservation Authority climate projections for Niagara Region

3.5 Data Limitations

The limitations described in this section are specific to the effects analyses undertaken in this report. Limitations affecting the baseline data are documented under Data Limitations in the Economic Existing Conditions Report.

3.5.1 Primary Data Collection Response Rates

The interview program documented in the Economic Existing Conditions Report achieved variable response rates across stakeholder groups: five business interviews representing six businesses from the 19 businesses contacted, one real estate brokerage interview supplemented by a group interview with members of the Niagara Association of REALTORS®, and no municipal finance interviews despite requests to all five municipalities. The low overall response rate, and the absence of municipal finance participation, limits the qualitative depth of the effects assessment for certain evaluation criteria.

3.5.2 Real Estate Market Data

Beginning in 2025, the Toronto Regional Real Estate Board (TRREB) changed its reporting format and no longer publishes detached home sales at the municipal level, reporting instead at the neighbourhood level. Municipal detached sales figures for 2025 were therefore derived by multiplying each neighbourhood's reported sales count by its reported average sale price and aggregating to the municipal level. TRREB suppresses average sale price where a neighbourhood records two or fewer transactions in a quarter; as a result, the aggregated municipal average sale price reflects fewer transactions than the total reported sales count. Missing quarterly transactions for the Glendale area of Niagara-on-the-Lake were supplemented with Geowarehouse records where available. Even after supplementation, suppression affects Niagara-on-the-Lake the most, accounting for 17.9%, 3.6%, and 6.1% of transactions in Q1, Q2, and Q3 2025 respectively. For all other LSA municipalities and the aggregated regional results, suppressed transactions account for a nominal share of total transactions in each quarter. The derived municipal averages are therefore considered representative of market conditions, though the Niagara-on-the-Lake figures, particularly Q1 2025, should be interpreted with some caution given the higher share of transactions excluded from the price calculation.

3.5.3 Property Values Analysis

The property value analysis is subject to several limitations that should be considered when interpreting the results. The most significant constraint is the limited number of post-announcement sales in most comparison areas. The announcement occurred on November 30, 2023, leaving approximately 27 months of post-announcement data through February 2026. Post-announcement sample sizes ranged from 10 sales (LSA Rural within 1,000 m) to 95 sales

(Downtown Thorold and Merritton vs. Downtown Welland), with only 2 post-announcement study-area sales in both the 1,000-metre and 1,000–2,000 metre rural bands. Small samples reduce statistical power, meaning that genuine but modest effects may go undetected. As additional post-announcement sales accumulate, the precision of these estimates will improve.

The analysis relies on price per square foot of lot area. Structural attributes such as building floor area, interior condition, and renovation history are not recorded in the Geowarehouse dataset and may introduce unobserved heterogeneity that the regression controls cannot remove.

Within the screened ranges, mean lot sizes differed significantly between study and control areas in three of the four comparisons; only Niagara-on-the-Green vs. Confederation Heights was closely matched. The per-square-foot metric and the DID design absorb level differences between areas, but lot-size composition contributes residual uncertainty.

The analysis measures the effect of the project announcement, not the project itself. Effects associated with construction, operation, or the physical presence of an expanded landfill cannot be assessed because those phases have not occurred, and announcement and operational effects may differ in magnitude and duration.

No two neighbourhoods are perfectly matched, and unobserved local factors, such as school catchment areas, municipal service levels, or localized development activity, may influence relative pricing trends independently of the announcement. The DID method also assumes that, without the announcement, prices in the paired areas would have moved in step. Where the two areas were already on different price paths before the announcement, as in the Downtown Thorold and Merritton comparison, the full-period DID result cannot be read on its own and is considered together with the additional checks presented alongside that comparison.

Geowarehouse records all transfers registered on title, including non-market conveyances such as estate transfers and intra-family transfers. Transfers recorded at nominal consideration were excluded, as were any transactions where Geowarehouse identified Walker as a party. Repeat sales of the same property are treated as independent observations.

3.5.4 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 limitation is that this approach yields a proxy for the actual cost of service, as negotiated rates are not publicly available.

4. Description of the Environment Potentially Affected

In this section, a description of the Economic environment is presented. The information is extracted from the Economic Existing Conditions Report, and a more detailed description and list of reference sources can be found in that report.

4.1 Existing Conditions – Local Study Area

4.1.1 Land Uses

The SSA lies outside the Settlement Area and Urban Area Boundaries defined in the Niagara Region Official Plan, within the Rural Area, and is surrounded by land that is predominantly agricultural in character, with field crops interspersed with rural residential properties and one agri-commercial use, Gauld Nurseries, at the northeast corner of Garner Road and Mountain Road. The Agricultural Existing Conditions Report identifies eleven agricultural operations within 1 km of the Campus, three to the north, one to the east, and seven to the south, with none identified to the west and no active livestock operations among them. Industrial uses on the Walker Resource Management Campus (landfill, aggregate processing, composting, and biosolids management) share the Campus with the SSA, with further industrial development to the southwest and along the Welland Canal corridor to the west. The Welland Canal separates the LSA from the urban areas of St. Catharines and Thorold to the west; the City of Niagara Falls Urban Area extends to Kalar Road to the east; and the Niagara Escarpment lies to the north. A full description of land uses and agricultural operations within the LSA is provided in the Land Use (MHBC, 2026) and Agricultural Existing Conditions Reports (Colville Consulting Inc., 2026).

4.1.2 Walker Resource Management Campus

The Walker Resource Management Campus, at 2800 Thorold Townline Road in the City of Niagara Falls, is a long-established industrial site combining waste management, resource recovery, aggregate processing, and renewable energy operations. Its facilities include the operating South Landfill (Phase 1), the Walker Brothers Quarry and the Southeast Quarry that constitutes the SSA, 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 Facility and associated landfill gas control infrastructure, an aggregate processing area with an asphalt plant, and Walker's head offices. The South Landfill has operated since 2009 and is anticipated to reach capacity by 2030, while aggregate extraction on the Campus dates to the 1880s (Walker, 2024a). The Campus is screened from adjacent road frontages by landscaped berms and perimeter vegetation, and Walker's surrounding agricultural land holdings, approximately 428.6 ha within 1 km of the SSA, representing about 64.3 percent of that area, function as a buffer to its operations.

4.1.3 Residences

Properties with residences in the immediate vicinity range from five properties with dwellings within 500 m of the proposed expansion, located to the north and along Garner Road to the east, to approximately 30 properties between 500 m and 1,000 m and a further 308 dwellings between 1,000 m and 2,000 m, including concentrations at Pine Tree Village and Shady Oaks Mobile Park and within the Niagara Falls urban boundary to the east and southeast.

4.1.4 Study Area Businesses

Within the NNA, 24 businesses (excluding Walker), one non-profit social club, and three Niagara Region public facilities were identified, together with several home-based operations identified through the SLR Site Neighbour Survey. They span manufacturing (the General Motors St. Catharines Propulsion Plant), recreation (Royal Niagara Golf Club, Regency Athletic Resort, and Beechwood Golf & Social House), agri-commercial uses (Gauld Nurseries and Perridiso Estate Winery), food service and retail (Broad Street Cheesesteaks, Pete's Pizza, Green Island Restaurant, and gas-station convenience operations), a pet boarding facility (Boondocks Pet Resort), and construction, landscaping, and automotive trades. The outdoor-oriented operations among these (the golf courses, the garden centre, the athletic resort, the pet resort, and food service with outdoor seating) are the businesses carried forward as potentially sensitive in the assessment of economic effects.

Beyond the NNA, approximately 209 businesses were identified within the LSA (about 180 in Downtown Thorold and Merritton St. Catharines, some 20 tenants at the Thorold Multimodal Hub, seven along the industrial corridor east of the canal, and the White Oaks Conference Resort and Spa to the north), rising to roughly 229 including home-based operations. Tourism businesses within the LSA include the White Oaks Conference Resort and Spa and the Inn at Lock Seven in downtown Thorold. The Outlet Collection at Niagara, immediately outside the 2 km LSA boundary, is noted for its regional scale, with approximately 109 tenants, 5.5 million annual shopper visits, and about 1,450 employees (Jones Lang LaSalle, 2024). A full inventory is provided in **Appendix A**.

4.1.5 Business Climate

LSA businesses are predominantly long-established and have operated continuously alongside the Walker Campus. Nine near-neighbour businesses were already operating at their current locations at the time of the Phase 1 EA in 2005, several with tenure exceeding twenty years at that time, including Gauld Nurseries, the General Motors St. Catharines Propulsion Plant, and Beechwood Golf & Social House (Gartner Lee Limited, 2006). At least six new businesses spanning retail, food service, construction, and industrial uses have opened within the NNA since the South Landfill began operating in 2009, including the Petro-Canada and Tim Hortons development (2015), Circle K (2015–2016), SilverLine Group (approximately 2021), Niagara Ready Mix (2024), and Broad Street Cheesesteaks and Pete's Pizza (2025). Tourism businesses in the wider LSA show the same continuity: the Inn at Lock Seven has operated in downtown Thorold since 1965, and the White Oaks Conference Resort and Spa, established in 1978, has approval in place for a major mixed-use residential development on its property. Operators interviewed cited convenient highway access, central positioning within Niagara

Region, and zoning appropriate to their operations as locational advantages, and several described active reinvestment and expansion plans. The continued operation of long-tenured businesses, together with new establishments locating in the area during Phase 1 operations, indicates that landfill proximity has not been a barrier to commercial activity in the area.

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. In addition to the common receptors, the air quality assessment includes a discipline-specific receptor (R12) at the service station at Thorold Stone Road and Thorold Townline Road, approximately 1,200 m from the proposed Waste Disposal Site Boundary Limits, representing the Petro-Canada gas station and convenience store, the Tim Hortons, and the adjacent Broad Street Cheesesteaks, which are not co-located with a common receptor. Boondocks Pet Resort, also on Thorold Stone Road within the 500–1,000 m band, is assessed at its own discipline-specific receptor (R11), located at the business, approximately 800 m from the proposed Waste Disposal Site Boundary Limits. Refer to **Figure 2** for the locations of common receptors.

The air quality and noise assessments also include discipline-specific receptors at individual rural residences surrounding the site; these additional non-common receptors all fall within the Rural Residential neighbourhood unit used for the property value analysis. Two businesses within the NNA are not directly represented by any of the above receptors: Perridiso Estate Winery (Warner Road, south of the QEW), approximately 1,000 m from the closest common receptors (CR17 and CR12); and Niagara Ready Mix (Old Thorold Stone Road), whose property is nearly 600 m from the closest receptor (CR10).

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

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

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.

Figure 2: Common Receptor Locations

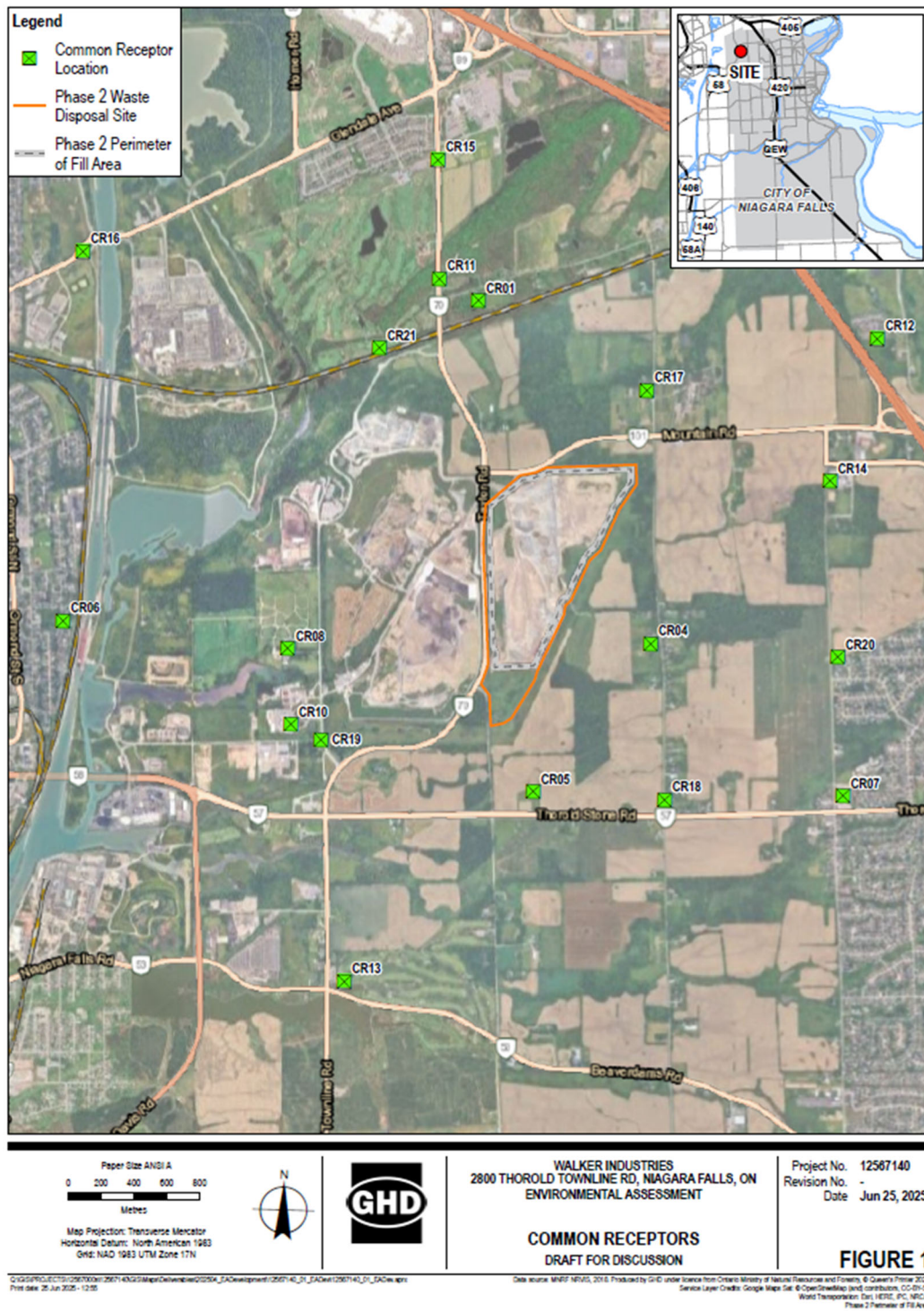


Table 3 lists the business properties (excluding at-home businesses) identified within proximity of each receptor location.

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	<ul style="list-style-type: none"> Located approximately 1,094m from the proposed Waste Disposal Site Boundary Limits. Serves as representative of residences on Warner Road and the Niagara Escarpment. 	<ul style="list-style-type: none"> No businesses identified
CR04	Nearest residences on Garner Rd	<ul style="list-style-type: none"> 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. 	<ul style="list-style-type: none"> No businesses identified
CR05	Nearest residence, South	<ul style="list-style-type: none"> Located approximately 450m from the proposed Waste Disposal Site Boundary Limits. 	<ul style="list-style-type: none"> 1 business: <ul style="list-style-type: none"> – Boondocks Pet Resort
CR06	Nearest residences West and City of Thorold urban boundary	<ul style="list-style-type: none"> 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. 	<ul style="list-style-type: none"> 1 business within close proximity of receptor: <ul style="list-style-type: none"> – The Inn at Lock Seven Dozens of businesses within proximity (properties $\leq \sim 500\text{m}$) concentrated in commercial core area of Front St. N, Clairmont St. and Albert St.
CR07	Nearest school: St. Vincent De Paul Catholic Elementary School	<ul style="list-style-type: none"> 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. 	<ul style="list-style-type: none"> 4 businesses: <ul style="list-style-type: none"> – Circle K – Pete's Pizza – Green Island – Skelding G Landscaping
CR08	Lakeview Cemetery	<ul style="list-style-type: none"> 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. 	<ul style="list-style-type: none"> No businesses identified. 1 institution: <ul style="list-style-type: none"> – Lakeview Cemetery

Receptor ID	Receptor Name	Receptor Description	Number of Businesses and Business Names within Proximity
CR10	Niagara Thorold Patrol Yard / Niagara Regional Police Fleet Centre	<ul style="list-style-type: none"> • 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. 	<ul style="list-style-type: none"> • 2 businesses: <ul style="list-style-type: none"> – SilverLine Group Inc. – Element Landscape Services Inc. (works yard)
CR11	Woodend Conservation Area	<ul style="list-style-type: none"> • 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. 	<ul style="list-style-type: none"> • 1 business: <ul style="list-style-type: none"> – Royal Niagara Golf Club
CR12	Pine Tree Village Mobile Home Park	<ul style="list-style-type: none"> • 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. 	<ul style="list-style-type: none"> • No businesses identified.
CR13	Beechwood Golf & Social House	<ul style="list-style-type: none"> • 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. 	<ul style="list-style-type: none"> • 3 businesses within proximity (properties \leq ~500m): <ul style="list-style-type: none"> – Beechwood Golf & Social House – Thorold Automotive Solutions – Rankin Asphalt
CR14	Northwest Secondary Plan Area	<ul style="list-style-type: none"> • 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. 	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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 clubhouse and Niagara College. The golf club is a large property; the course grounds nearest the site are represented by CR21. 	<ul style="list-style-type: none"> • 2 businesses: <ul style="list-style-type: none"> – Royal Niagara Golf Club (clubhouse) – White Oaks Conference Resort and Spa (property \leq ~500m) • 1 institution <ul style="list-style-type: none"> – Niagara College

Receptor ID	Receptor Name	Receptor Description	Number of Businesses and Business Names within Proximity
CR16	St. Catharines	<ul style="list-style-type: none"> 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. 	<ul style="list-style-type: none"> 4 businesses within proximity (properties \leq ~500m) 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	<ul style="list-style-type: none"> 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. 	<ul style="list-style-type: none"> 1 business: <ul style="list-style-type: none"> Gauld Nurseries Ltd
CR18	Residences at South end of Garner Road	<ul style="list-style-type: none"> 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. 	<ul style="list-style-type: none"> No businesses identified.
CR19	Nearest Residence Southwest	<ul style="list-style-type: none"> Located approximately 1033m from the proposed Waste Disposal Site Boundary Limits. This is a Walker-owned property that is currently tenanted. 	<ul style="list-style-type: none"> 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 Broad Street Cheesesteaks
CR20	Residences east of Kalar Road	<ul style="list-style-type: none"> Located approximately 1585m from the proposed Waste Disposal Site Boundary Limits. Representative of subdivision east of Kalar Road. 	<ul style="list-style-type: none"> No businesses identified.
CR21	Royal Niagara Golf Club	<ul style="list-style-type: none"> Located approximately 1146m from the proposed Waste Disposal Site Boundary Limits. The golf club is a large property; its clubhouse and northern holes are represented by CR15. 	<ul style="list-style-type: none"> 1 business: <ul style="list-style-type: none"> Royal Niagara Golf Club (course grounds)

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.

4.1.7.1 Nuisance Values

Baseline nuisance values at the common receptor locations are recorded for existing conditions, 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 suspended particulates, or TSP), total odours, impulsive noise, continuous noise, and traffic (reported as Walker landfill and quarry heavy-vehicle trips on the road segment most relevant to each receptor) are summarised in **Table 4**. Visibility is characterised separately in the narrative that follows.

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 (dB(AI) 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
R11	Residence (Boondocks Pet Resort)	500-1000m	80; 0 days	Max 10-min OU: 5.1 Freq >1 OU: 1.1% \approx 96-hrs/yr Freq >3 OU: 0.2% \approx 18-hrs/yr	—	—	—	—
R12	Service Station (adjacent Broad Street Cheesesteaks)	>1000m	97; 0 days	Max 10-min OU: 5.0 Freq >1 OU: 1.2% \approx 105-hrs/yr Freq >3 OU: 0.3% \approx 26-hrs/yr	—	—	—	—

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 24-hour TSP above the MECP 24-hour Ambient Air Quality Criterion of 120 $\mu\text{g}/\text{m}^3$ (Ministry of the Environment, Conservation and Parks, 2020): CR08 (Lakeview Cemetery, 156 $\mu\text{g}/\text{m}^3$), CR21 (Royal Niagara Golf Club, 155 $\mu\text{g}/\text{m}^3$) and CR19 (Nearest Residence Southwest, 123 $\mu\text{g}/\text{m}^3$). The criterion is exceeded on six days over the five-year modelling period at CR21 (Royal Niagara Golf Club), and on one day each at CR08 (Lakeview Cemetery) and CR19 (Nearest Residence Southwest); the other 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 1, 3 and 5 OU, where 1 OU is the average detection threshold, at which odour is generally first detectable but not necessarily a nuisance; 3 to 5 OU is the range the Air Quality assessment associates with odour that may cause complaints, with 3 OU the recognition threshold and 5 OU the annoyance threshold. Under existing conditions, odour above the 1 OU detection threshold occurs 0.5% or more of the time at the receptors nearest the campus, reflecting its established operations. The highest 10-minute maximum odour concentrations are recorded at CR19 (Nearest Residence Southwest, 6.8 OU), CR10 (Niagara/Thorold Patrol Yard and Police Fleet Centre, 6.3 OU) and CR08 (Lakeview Cemetery, 5.7 OU). Excursions above the 3 OU threshold occur at seven receptors, expressed here as the percentage of annual hours: CR08 for 1.0% of the time (~88 hr/yr), CR19 for 0.7% (61 hr/yr), CR10 for 0.6% (53 hr/yr), CR21 (Royal Niagara Golf Club) for 0.4% (35 hr/yr), CR05 (Nearest Residence South) for 0.2% (18 hr/yr), and CR11 (Woodend Conservation Area) and CR01 (Residences on Warner Road and the Niagara Escarpment) for 0.1% each (9 hr/yr). The 5 OU level is exceeded at CR19 for 0.2% of the time (~18 hr/yr) and at CR08 and CR10 for 0.1% (~9 hr/yr) each. The other eleven receptors record no excursions above the 3 OU threshold.

Noise

Impulsive noise refers to short-duration, high-intensity noise events and is measured in dBAI; the criterion is 70 dBAI at the point of reception. 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 highest impulsive values are recorded at CR10 (Niagara/Thorold Patrol Yard and Police Fleet Centre, 63 / 55 / 71 dBAI), CR05 (Nearest Residence South, 62 / 54 / 71), CR04 (Nearest residences on Garner Road, 58 / 55 / 70) and CR08 (Lakeview Cemetery, 63 / 48 / 70). At the other receptors the maximum single-source value ranges 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, the sustained background level reported as dBA day / night, is distinct from these short impulsive events. The criteria are 55 dBA in any daytime hour and 45 dBA at night. The highest values are recorded at CR21 (Royal Niagara Golf Club, 58 / 36), CR10

(Niagara/Thorold Patrol Yard and Police Fleet Centre, 50 / 48), CR08 (Lakeview Cemetery, 49 / 45) and CR19 (Nearest Residence Southwest, 47 / 44); the other receptors record daytime levels of 49 dBA or below.

Traffic

Walker site-generated trips at each common receptor are reported as the number of heavy-truck movements in the AM and PM peak hours on the road segment most relevant to that receptor, together with the share these represent of total peak-hour traffic on that segment, modelled at the 2028 reference year under the baseline scenario (South Landfill Phase 1 and the quarry operating together, no South Landfill Phase 2). Twelve receptors have a relevant road segment; six are not adjacent to a segment relevant to Walker operations and are recorded as not applicable: CR06 (Nearest residences West and City of Thorold urban boundary), CR12 (Pine Tree Village Mobile Home Park), CR15 (Niagara-on-the-Green Subdivision), CR16 (St Catharines), CR20 (Residences east of Kalar Road) and CR21 (Royal Niagara Golf Club).

The highest Walker volumes are on the Thorold Stone Road and Taylor Road corridors closest to operations. CR07 (St. Vincent De Paul Catholic Elementary School, Thorold Stone Road east of Garner Road) records 45 trips in the AM peak hour and 27 in the PM peak hour, equivalent to 2.8% and 1.4% of peak-hour traffic on that segment; CR05 (Nearest Residence South, Thorold Stone Road between Garner and Taylor Roads) records 43 (2.7%) and 27 (1.4%); and CR01 (Residences on Warner Road and the Niagara Escarpment) and CR11 (Woodend Conservation Area), both on Taylor Road north of the primary quarry access, each record 42 (7.9%) and 26 (3.8%). CR14 (Northwest Secondary Plan Area, Mountain Road east of Garner Road) records 21 (4.9%) and 16 (3.5%).

On the lighter Thorold Townline Road corridor the same volumes form a larger share of traffic: CR10 (Niagara/Thorold Patrol Yard and Police Fleet Centre) and CR19 (Nearest Residence Southwest) each record 10 trips in the AM peak and 8 in the PM peak (9.1% and 6.6%), CR13 (Beechwood Golf & Social House) records 10 and 8 (3.4% and 2.0%), and CR08 (Lakeview Cemetery) records 7 and 6 (10.0% and 6.3%). The Garner Road receptors record the lowest volumes: CR04 (Nearest residences on Garner Road) and CR18 (Residences at South end of Garner Road) each 2 and 1 (1.9% and 1.0%), and CR17 (Nearest residence Northeast and Gauld Nurseries) 0 and 1 (0.0% and 11.1%).

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 features are non-Walker landscape elements such as vegetation, agriculture and commercial and industrial operations (GHD, 2026a).

4.1.8 Walker Complaint Record

The Walker complaint record, summarised in the RWDI Air Quality Existing Conditions Report (RWDI AIR Inc., 2026a), characterises nuisances reported over the 2022 to 2025 period. Odour accounts for almost the entire record, with 113 complaints logged over the period, while dust drew a single complaint and landfill gas, combustion by-products and blowing litter none. Odour complaints fell from 2022 to 2024 (41, 31 and 15) before rising to 26 in 2025, with the increase driven by composting rather than the landfill; composting was the largest single source over the period. RWDI attributes the elevated 2022 and 2023 volumes to landfill gas wells installed during construction of the renewable natural gas facility, which penetrated the cap, and the subsequent decline to completion of that work and current best-management practices (RWDI AIR Inc., 2026a). Complaints were concentrated in Thorold and the Niagara-on-the-Green subdivision in Niagara-on-the-Lake, in broadly similar numbers and consistent with the prevailing southwest, south and east winds, with Niagara Falls accounting for a smaller share and St. Catharines and White Oaks only isolated complaints.

4.1.9 Interview Responses Regarding Nuisance Effects

Interviews with LSA business operators and regional organisations identified odour as the only nuisance raised as a meaningful concern. Among business operators, perceptibility varied with wind direction and weather and frequency differed by location, and no operator reported that odour had resulted in a loss of business, although one noted occasional past concerns regarding potential impact on outdoor activities. Two operators reported occasional exposure with no impact on operations; one described the smell as perceptible on arrival but not inside the building; and one reported odour every one to two weeks depending on weather and wind, while acknowledging that conditions had been more serious four to five years earlier. Noise from the landfill was not raised by any operator, and no respondent raised dust, litter, traffic, or visual intrusion; one respondent noted that nearby roads can become muddy from truck activity but credited Walker's cleanup. Across the six regional organisations interviewed, nuisance effects from Walker's operations had not aggregated into a sectoral or association-level concern; the two first-hand accounts described odour as occasional rather than persistent, and one credited Walker with keeping noise to a minimum. An interview with the Royal Niagara Golf Club, documented in the Social Existing Conditions report, indicated that golfers have noticed odours on occasion, perhaps four or five times a year, with no other nuisance categories raised (SLR Consulting (Canada) Ltd., 2026a).

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

The SLR Site Neighbour Survey, delivered in 2025 to approximately 260 of the nearest residences, indicates that the Campus has affected some residents' use and enjoyment of their properties (SLR

Consulting (Canada) Ltd., 2026b). Of 38 respondents (28 in Niagara Falls and 10 in Niagara-on-the-Lake), 22 (58 percent) reported such an effect, almost all attributing it to odour, with smaller numbers reporting truck noise or having made modifications for noise or dust. Half had considered moving in the past five years, most often citing odour, although most of those who stayed cited the area's green space, neighbourhood character, and quiet.

4.1.10 Local Economy

This section summarises the labour force, occupational and industrial structure, commuting patterns, business base, and the tourism and agricultural sectors documented in the Economic Existing Conditions Report.

The labour market is broadly self-contained and, by 2025, had recovered from the pandemic-era disruption visible in the 2021 Census. At the time of the Census, unemployment was elevated across all four LSA communities, ranging from 15.0% in Niagara-on-the-Lake to 22.5% in Niagara Falls, and employment had declined by 9.1% across the LSA between 2016 and 2021. These figures reflect pandemic-era conditions rather than structural weakness. More recent Labour Force Survey data for the St. Catharines–Niagara CMA show employment recovering from 203,000 in 2021 to 239,300 by 2025, with the unemployment rate declining from 10.4% to 5.2% in 2022 before settling at 6.9% in 2025 and the participation rate holding near 60–62%. The LSA comprises roughly 57.6% of the RSA's working-age population, and regional participation and unemployment rates closely track the LSA, indicating that conditions around the Walker Campus are representative of the wider region.

The occupational and industrial structure is shifting toward higher-skilled, higher-wage work. In 2024 the LSA supported approximately 137,890 jobs, weighted toward service and trades-oriented categories, with St. Catharines and Niagara Falls accounting for over 80% of the total. Between 2018 and 2024, LSA employment declined 3.8% while the RSA grew 3.3%. Within the LSA, contraction was concentrated in lower-wage categories (sales and service –20.7%; natural resources and agriculture –18.3%) and in manufacturing and utilities (–13.7%), while higher-wage professional and technical categories grew. Trades, transport and equipment operators (NOC 7), the category most relevant to landfill construction and operation, grew 3.5% locally. By industry, the steepest declines were in arts, entertainment and recreation (–43.8%) and accommodation and food services (–32.0%), offsetting growth in construction (8.1%), transportation and warehousing (16.5%), professional, scientific and technical services (14.7%), health care (11.7%) and education (11.7%). The industries most relevant to the project's capital and operating expenditures, construction, professional services, transportation and warehousing, grew in both study areas, indicating an active local supplier base. Total LSA industry sales reached \$31.1 billion in 2023, or 57.4% of the RSA total. Interviewees described construction labour as exceptionally tight, driven by major projects including the South Niagara Hospital and the Asahi Kasei battery separator plant, and identified workforce availability, housing affordability and trade uncertainty with the United States as the principal pressures on the local economy.

The local economy retains most of the income the project would generate. Commuting data show the LSA functioning as a largely self-contained labour market. 78.5% of LSA-based jobs are held by LSA residents and 96.1% by workers living within the RSA, while LSA residents fill 56.3% of all jobs across the region. Wages earned at the project and its local suppliers, and the consumer spending those wages generate, would therefore remain predominantly within the study area. The business base reinforces this. The LSA contained 31,665 businesses in June 2025 (about 60% of the RSA total), dominated by small enterprises but including 17 of the region's top 20 private employers. Walker's existing South Landfill already contributes to this base, employing 16 full-time staff who all reside in the Niagara Region and procuring from 129 suppliers, of which 54 (42%) are within the LSA, accounting for roughly three-quarters of external procurement spending.

Two sectors, tourism and agriculture, have been in long-term decline that preceded the project. Tourism, centred on Niagara Falls and Niagara-on-the-Lake, drew approximately 8.3 million person visits in 2022, predominantly domestic and same-day, but LSA tourism employment fell 31.4% between 2018 and 2024, a steeper drop than the RSA's 20.1%, and tourism wages are well below the LSA industry average of \$54,000. Agriculture, concentrated in Niagara-on-the-Lake, is consolidating toward fewer, larger operations, with LSA farm employment down 19.3% over the same period. LSA real GDP grew 2.3% between Q3 2023 and Q3 2025, below the CMA's 3.2%, with Niagara Falls and Niagara-on-the-Lake below the LSA average. Overall, the LSA economy is large but growing slowly and unevenly, with an active supplier base in the sectors relevant to the project and a tight labour market.

4.1.11 Property Values

This section describes single family detached home sales among the residential neighbourhoods within the LSA, the wider detached-home market, and the observations of two real estate professionals active in the region, as documented in the Existing Conditions Report. The South Landfill Phase 2 announcement of November 30, 2023 is treated as the dividing line between pre-announcement and post-announcement conditions.

The transaction histories of single family detached homes in the residential neighbourhoods, within the boundaries defined under Property Values Analysis in the Study Methodologies section, were obtained from Geowarehouse records between January 2009 and November 2023. The rural-residential area, limited to lots of five acres or less located more than 100 metres from the urban fringe and excluding transactions where Geowarehouse identified Walker as a party, recorded 51 qualifying sales, advancing from the \$250,000–\$390,000 range to about \$940,000 by 2022. Mount Carmel, limited to the relatively uniform interior portion and excluding the urban-boundary cluster fronting Kalar Road and Vegter Court, recorded 69 sales, rising from \$460,000–\$650,000 to a peak near \$1,570,000 in 2022 before easing to about \$990,000 in 2023. Niagara-on-the-Green recorded 197 sales, rising from about \$320,000 to about \$1,090,000 by 2022. Downtown Thorold and adjacent Merritton recorded 500 sales, rising from about \$160,000 to a peak near \$580,000 in 2022 before easing to about \$510,000 in 2023. Thorold South, the smallest market at 11 sales involving five properties, was excluded from statistical testing for want of post-announcement

transactions. All areas appreciated strongly to a 2022 peak; where 2023 sales are recorded, prices eased below peak.

The wider detached-home market moved through a full cycle over the baseline period. Detached homes are the dominant housing type in the LSA, accounting for 71–75% of residential sales, and the LSA represented 51–58% of RSA sales in every year from 2018 to 2025. Prices and volumes expanded through 2022, corrected, and continued to decline through 2025. Within the LSA, Niagara-on-the-Lake traded at 1.7 to 2.1 times the other communities, while Niagara Falls, St. Catharines and Thorold remained closely aligned. Over a longer twenty-year horizon, the MLS Home Price Index benchmark for the RSA tracked the provincial trend while consistently trading below it. Industry, institutional and central-bank sources attribute this cycle to interest rate conditions and migration from the Greater Toronto Area rather than to local factors. The Bank of Canada's policy rate fell to 0.25% in 2020, rose through ten increases to 5.00% by July 2023, and was reduced to 2.25% by October 2025, while CMHC and Central 1 Credit Union linked the 2020–2021 surge to GTA out-migration and the subsequent correction to deteriorating affordability.

Interviews with two real estate professionals active in the region corroborated the quantitative baseline. Both described current conditions in subdued terms, "modest to weak" and "trickling along", with prices down 15 to 20 percent from the February 2022 peak and lower-priced properties continuing to transact while higher-priced segments soften. Both attributed conditions to affordability and broader economic uncertainty, including trade and job-stability concerns, rather than to interest rates at current levels or to localized factors. They also noted geographic variation within the region, with Niagara-on-the-Lake carrying 13 months of inventory (a buyer's market) against balanced conditions of five to six months in St. Catharines and Niagara Falls. The transaction records, market data, institutional commentary, and practitioner accounts point to a regional housing market shaped by monetary policy and affordability and moving through a province-wide cycle.

4.1.12 Public Finance

This section summarises population, tax base, revenue, financial stability, capital assets, and waste management conditions for the LSA municipalities (Niagara Falls, Niagara-on-the-Lake, St. Catharines and Thorold) and the Regional Municipality of Niagara documented in the Economic Existing Conditions Report.

Population and housing grew unevenly over 2018–2024. Household growth across the LSA totalled about 5.2%, with Thorold and Niagara-on-the-Lake recording the strongest gains and St. Catharines the only decline, while population grew 9.5%, outpacing housing and indicating rising household sizes and intensification. Niagara Falls, the host municipality, grew more slowly in population (7.2%) than the LSA and RSA but added households (6.7%) broadly in line with the region. Construction activity shifted in character. Between 2018 and 2024 the value of building permits more than doubled in the LSA (from \$390 million to \$839 million) and rose 61.7% in the RSA, even as permit counts fell in both areas, so that average per-permit values roughly tripled, reflecting cost escalation and a shift toward larger non-residential projects.

The tax base is concentrated in the LSA and weighted toward residential property. The four LSA municipalities held taxable assessment of \$37.6 billion in 2024, or 57.0% of the RSA's \$66.0 billion, and contained nearly three-quarters of the region's non-residential assessment (\$6.2 billion of \$8.6 billion). Niagara Falls carried \$12.7 billion in assessment, second to St. Catharines, and drew the largest "other" (commercial, industrial, office, and other non-residential property classes) share among the LSA municipalities at 22.0%, making it the most diversified. Of note for the project, the landfill property class carries the highest tax ratio of any class in the Region (2.940261) and a 2025 municipal-and-regional rate in Niagara Falls of 5.273725%. On revenue, LSA municipalities generated \$665 million in 2024, funding themselves predominantly from own-source income (property taxes and user fees, 69.8% of the total) with minimal reliance on transfers (4.6%); the Region, by contrast, drew 35.2% of its \$1.46 billion from provincial and federal transfers, reflecting its cost-shared service responsibilities.

The municipalities are financially sound. All four LSA municipalities and the Region meet recognised benchmarks across liquidity, debt-servicing, operating-surplus and asset-consumption measures, with LSA current ratios of 3.5 to 4.3 against a minimum of 1.0 and asset-consumption ratios below the 50% threshold, indicating infrastructure generally in the first half of its useful life. The Region meets all benchmarks but records weaker ratios, consistent with its upper-tier responsibilities and older large-scale infrastructure. Infrastructure dominates the municipal asset base (between 52.6% and 79.3% of assets across the LSA), and most municipalities are reinvesting faster than their assets amortize. Three of the four LSA municipalities post asset-sustainability ratios above 100% (Niagara Falls at 171.3%), with St. Catharines the exception at 60.4%. Persistent funding gaps nonetheless exist, with the LSA municipalities collectively reporting about \$54–55 million in annual shortfalls and the Region identifying a \$391.8 million annual gap and a \$2.8 billion deferred-capital backlog, though its waste-management assets are in comparatively strong condition.

Waste management is funded across the two-tier system and is not fully cost-recovered. Solid waste collection, disposal and diversion are regional responsibilities; the Region's 2024 environmental-services expenditure of \$172.2 million included \$16.6 million for solid-waste disposal and \$57.5 million for wastewater treatment, where Walker's leachate is ultimately processed. The one direct lower-tier financial link to landfill operations is the leachate discharge agreement with Niagara-on-the-Lake: Walker discharges about 350,000 cubic metres annually at \$1.72 per cubic metre, generating about \$600,000 a year for the Town, equivalent to about 4.1% of its user-fee revenue. The Region's full-cost-recovery rate for disposal is estimated at \$181 per tonne, about \$53 above its current tipping fee, requiring the Region to subsidise 29% of disposal operating costs through the tax levy, and the Region's landfill liability reserve is substantially underfunded at \$5.5 million against a \$129.7 million liability (2023).

4.1.13 Cost of Services

This section summarises waste-disposal and cost-of-services conditions in the Province and Niagara Region, including provincial disposal capacity, regional facilities, and disposal pricing documented in the Economic Existing Conditions Report.

Ontario's landfill capacity is finite and increasingly reliant on private operators and cross-border export. The province generated about 16.88 million tonnes of waste in 2024, of which 12.75 million tonnes were landfilled; 73% (9.31 million tonnes) was managed at Ontario landfills and 27% (3.44 million tonnes) was exported to the United States, over 90% of it to Michigan. As of 2024 the province held an estimated 125.61 million tonnes of approved remaining capacity, just over half of it in private facilities, with seven landfills, including Walker's South Landfill, accounting for 51% of the total. At current disposal rates and continued export, Ontario's domestic landfill capacity is projected to be depleted by approximately 2037, or by approximately 2034 if cross-border exports were curtailed, framing the provincial context within which the Region's infrastructure operates.

Three operational landfills serve the Niagara Region. The Region owns and operates Humberstone in Welland (4.6 million cubic metres approved, 700 tonnes per day, about 46% used as of January 2023) and Niagara Road 12 in West Lincoln (1.851 million cubic metres, 136 tonnes per day, about 50% used). Walker's South Landfill in Niagara Falls, operating since 2009 with an approved capacity of 17.7 million cubic metres and an approved annual fill of 1.1 million tonnes, is anticipated to reach 99% of its approved capacity (Phase 1) by mid-2030. Under a partnership agreement, the Region directs up to 100,000 tonnes per year of curbside and self-hauled residential waste to Walker's Thorold site. In total, the South Landfill receives about 439,250 tonnes annually from within the Region, about 74% of all waste generated there, while the Region's own landfills handle about 13% and a further 13% is exported to the United States. Of the regionally generated garbage managed across the three landfills in 2022 (excluding industrial, commercial and institutional waste at the South Landfill), Walker handled 42.8%.

Disposal pricing differs sharply between gate-rate and bulk customers, and is shaped by cross-border competition. The Region charges a gate rate of \$128 per tonne, near the \$125.40 public-sector average for neighbouring municipalities and within a \$75–\$194 range, and Walker charges a comparable \$130.55 per tonne (including HST) for household waste at its Thorold depot. These posted rates apply to small-load and residential customers. Industrial, commercial and institutional (IC&I) generators, which account for the majority of Walker's volume, are served through individually negotiated bulk contracts. Pricing in this segment is constrained by cross-border alternatives: Michigan facilities receiving Canadian waste charge \$24–\$25 CAD per tonne, putting Ontario facilities within proximity of the border in an estimated \$39–\$45 per tonne range, while New York's Modern Landfill, about 26 kilometres from the South Landfill, holds a state contract at \$92 CAD per tonne but has only about one year of constructed capacity remaining. In-region disposal also avoids the transfer-station consolidation cost (about \$15.75 per tonne) that out-of-region haulage typically incurs, since the South Landfill accepts direct delivery.

4.2 “Future” Existing Conditions (Do Nothing Option)

This section describes the planned development context and the economic conditions expected to prevail within the study areas in the absence of the proposed undertaking. The description is organised according to the four evaluation criteria established in the approved ToR. The future

baseline is characterised over the project's operating life to a planning horizon of 2051, consistent with the growth forecasts of the Niagara Region Official Plan (Niagara Region, 2022a).

4.2.1 Planned Development and Land Use Context

Beyond the rehabilitation of the SSA quarry lands to agriculture described above, the future baseline includes the planned development of the surrounding study area, which would proceed with or without the proposed undertaking. The Niagara Region Official Plan directs forecasted residential and employment growth predominantly to settlement areas, through intensification within built-up areas and development of designated greenfield areas (Niagara Region, 2022a). The Rural Area of Niagara Falls, within which the site is located, is allocated only 0.5% of the city's household growth to 2051 (Niagara Region, 2022a), equivalent to approximately 102 units; the principal development areas relevant to the LSA are identified in the Land Use Existing Conditions Report (MHBC, 2026).

The most significant of these is the Northwest Secondary Plan area, located west of the Queen Elizabeth Way, south of Mountain Road, and east of Kalar Road, which was brought into the City of Niagara Falls Urban Area Boundary through the 2022 Niagara Region Official Plan and is designated a Designated Greenfield Area (MHBC, 2026). The Secondary Plan is at an advanced stage of preparation, with a draft land use schedule providing for a mix of residential, mixed-use, institutional, and open-space uses planned as a complete community at a minimum density of 50 residents and jobs combined per hectare, and designated greenfield growth on the order of 10,010 housing units is allocated to Niagara Falls under the Plan (Niagara Region, 2022a) (MHBC, 2026).

To the northwest, within the Town of Niagara-on-the-Lake, the Glendale Secondary Plan area, which encompasses the Outlet Collection at Niagara, the White Oaks Conference Resort and Spa, and Niagara College, is similarly identified for continued development and intensification (MHBC, 2026). Beyond these secondary plan areas, ongoing residential intensification, infill, and selected urban-boundary growth are anticipated within the broader LSA over the operating life of the project. Within ~1 km of the site, however, no new residential or employment development is designated or foreseen (MHBC, 2026). The immediate surroundings remain in Prime Agricultural and rural use, and the quarry lands within the SSA are themselves slated for rehabilitation to agriculture under the Aggregate Resources Act (Colville Consulting Inc., 2026).

4.2.2 Local Economy

The Niagara Region Official Plan forecasts substantial employment growth across the LSA over the project's operational life. **Table 5** presents the projected distribution by municipality, with growth concentrated in Niagara Falls, the host municipality, and Niagara-on-the-Lake. The Region's 2022 Development Charges Background Study estimates that this employment growth will require approximately 40.2 million square feet of new non-residential gross floor area by 2051, of which 33 percent is industrial and 36 percent commercial (Watson & Associates, 2022).

Table 5: Projected Employment Growth

Area	2021	2051	% Growth 2021-2051
Niagara Falls	37,780	58,110	53.8%
Niagara-on-the-Lake	11,800	17,610	49.2%
St. Catharines	61,780	79,350	28.4%
Thorold	8,530	12,510	46.7%
LSA Total	119,890	167,580	39.8%
Niagara Region (RSA)	187,110	272,000	45.4%

Source: (Niagara Region, 2022a); (Avaanz Ltd., 2026b).

The Region's 10-year economic development strategy targets diversification across advanced manufacturing, agriculture, logistics, and tourism, supported by Niagara's position along the Southern Ontario economic corridor and its designation as Canada's first Foreign Trade Zone Point (Niagara Region, 2022b). Several anchor investments signal the direction of future job creation: Asahi Kasei's \$1.6 billion battery separator plant, General Motors' \$2 billion retooling for EV drive unit production (now expected by early 2027), a new university campus in Niagara Falls, and \$69 million in Niagara Parks Commission capital spending (The Greater Niagara Chamber of Commerce, 2024) (City of Niagara Falls, 2023). These commitments introduce sectors that were not present when the baseline data were collected.

Business and economic development representatives interviewed for this assessment identified the structural advantages behind these investment patterns. Niagara's position within one of North America's most populous corridors, access to fresh water, proximity to multiple US border crossings, and connections via highway, rail, and the St. Lawrence Seaway were cited as factors attracting logistics and manufacturing investment. One business association relayed a major construction contractor's view that the region is a remaining frontier for industrial land availability, with development opportunities becoming scarce elsewhere in southern Ontario, and another organisation noted that regional economic development departments have coordinated their approach, working as one team to assess available land inventory across municipalities. These observations are consistent with the anchor investments noted above and indicate that the advantages underpinning the LSA's attractiveness to investment are structural rather than cyclical.

The near-term outlook is less certain. In interviews, one business organisation described the one-to-three-year outlook as anywhere from quite positive, if tariffs are lifted and the Canada-United States-Mexico Agreement (CUSMA) renegotiation favours Canada, to potentially disastrous, with a serious recession possible if the tariff war intensifies, while another tied that uncertainty to trade policy. Businesses are resilient and will adapt, but they cannot plan when they do not yet know what they will need to adapt to. A third expected consolidation among smaller businesses as owners approaching succession decide whether to carry on or sell, with others investing in automation where workers are hard to find. Municipal economic development staff reported that tariffs have already cut into wine exports, and that greenhouse operators selling into the United States are stable for now but exposed if tariffs escalate. The drivers of LSA economic growth

remain in place, but investment and expansion decisions are likely to come more slowly while this uncertainty lasts.

Labour market forecasts over this horizon must account for automation and artificial intelligence. Early evidence suggests task-level restructuring rather than wholesale displacement: Statistics Canada reported that nearly 90 percent of AI-adopting businesses saw no change in employment levels through 2025, and sectoral research concluded that task augmentation is the more probable outcome for manufacturing and transportation occupations (Statistics Canada, 2026e) (IRPP, 2025). Applied to the LSA, aggregate job counts are unlikely to contract solely as a result of automation, though the composition of employment will shift.

Agriculture is expected to continue consolidating toward fewer, larger, capital-intensive operations. Farm employment in the LSA will likely decline in headcount while economic output and specialisation increase (Niagara Region, 2024c). In interviews, Niagara-on-the-Lake economic development staff reported that the Town has secured provincial funding to modernize and extend its irrigation system to an additional 4,000 acres, an investment intended to strengthen water security for specialty crop operations following a notably dry growing season. Tourism's outlook depends on whether provincial commitments are realised. The Destination Niagara Strategy targets nearly 25 million annual visitors, up from 13 million, with a projected \$3 billion in additional annual economic impact (Ontario Ministry of Tourism, Culture and Gaming, 2025).

Over the project's operational life, the LSA economy is projected to grow, with the economic base broadening beyond hospitality and general manufacturing. Transport connectivity, land availability, and coordinated regional economic development position the area to sustain investment attraction, though near-term trade policy uncertainty may moderate the pace of growth. Agriculture will likely produce more with fewer workers, and tourism's recovery depends on the realisation of provincial commitments. The project's economic effects would enter an economy that is growing and diversifying but subject to these sectoral and policy uncertainties.

4.2.3 Property Values

The LSA real estate market is expected to remain supported by the demographic and employment growth projected in the preceding sections. CMHC's 2026 Housing Market Outlook projects that sales in the St. Catharines–Niagara CMA will increase in 2026, though remaining below the 10-year average, driven primarily by improving affordability, though growth is expected to be constrained by reduced in-migration from the GTA and Hamilton due to return-to-office mandates, fewer international migrants, and more cautious buyers. Average prices are anticipated to remain relatively stable in 2026 before modest growth resumes in 2027 and 2028 as economic conditions normalise and demand strengthens, particularly from first-time buyers seeking more affordable single-family homes (CMHC, 2026).

Provincial housing supply analyses reinforce this outlook. The Smart Prosperity Institute estimates that Ontario needs 1.7 million additional homes between 2021 and 2031 to restore affordability to the rest-of-Canada average, and at the regional level estimates that Niagara requires 47,830 of those net new homes, of which 36,760 address a pre-existing shortage: households that would

already have formed, such as adults still living with parents or sharing accommodations, had housing been available at the household-formation rates seen in the rest of Canada (Smart Prosperity Institute, 2024). Current construction is not keeping pace: Ontario housing starts declined approximately 25 percent year-over-year in 2025, reaching the lowest level in a decade (Real Estate Institute of Canada, 2026). This sustained shortfall in new supply is expected to compound existing affordability pressures in the future.

The future baseline for property values is persistent excess demand relative to supply, with price growth constrained in the near term but supported by demographic fundamentals.

4.2.4 Public Finance

Population and household growth adopted in the Niagara Region Official Plan will shape the fiscal conditions into which the project's tax and revenue contributions would be introduced. **Table 6** presents projected population growth from 2024 to 2051.

Table 6: Projected Population Growth

Area	2024	2051	% Growth 2024-2051
Niagara Falls	94,415	141,650	50.0%
Niagara-on-the-Lake	19,088	28,900	51.4%
St. Catharines	136,803	171,890	25.6%
Thorold	29,343	39,690	35.3%
LSA Total	279,649	382,130	36.6%
Niagara Region (RSA)	539,180	694,000	28.7%

Source: Avaanz Ltd. (2026b) analysis using (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) (Niagara Region, 2022a).

Table 7 presents projected housing growth over the same period. Household growth drives municipal revenue through expansion of the property tax base and development charges collected at building permit issuance.

Table 7: Projected Housing Growth

Area	2024	2051	% Growth (2024-2051)
Niagara Falls	40,205	58,740	46.1%
Niagara-on-the-Lake	8,386	12,500	49.1%
St. Catharines	58,905	78,320	33.0%
Thorold	11,356	15,660	37.9%
LSA Total	118,852	165,220	39.0%
Niagara Region (RSA)	215,229	298,645	38.8%

Source: Avaanz Ltd. (2026b) analysis using (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) (Niagara Region, 2022a).

Table 8 applies the projected household growth to per-household revenue and expense factors to project municipal revenue and expenditure, as described in the Public Finance methodology. All four LSA municipalities currently generate per-household operating surpluses, suggesting that residential growth at forecast levels would expand fiscal capacity rather than strain it. These projections assume constant per-household rates with no inflation adjustment; actual outcomes will depend on the timing of development, housing type, assessment mix, and capital infrastructure costs.

Table 8: Per Household Revenue and Expense Factors, 2024

Area	2024 Revenue per HH	2024 Operating Expenses per HH	New HHs 2024-2051	Projected Revenue Growth from New HHs	Projected Expenses from New HHs	Net Revenue
Niagara Falls	\$6,614	\$5,148	18,535	\$122,582,000	\$95,419,000	\$27,163,000
Niagara-on-the-Lake	\$6,812	\$5,428	4,114	\$28,023,000	\$22,331,000	\$5,692,000
St. Catharines	\$4,444	\$3,929	19,415	\$86,277,000	\$76,289,000	\$9,988,000
Thorold	\$7,103	\$4,613	4,304	\$30,572,000	\$19,855,000	\$10,717,000
LSA Total	\$5,599	\$4,513	46,368	\$267,454,000	\$213,894,000	\$53,560,000
RSA	\$6,794	\$6,197	83,416	\$566,688,000	\$516,894,000	\$49,794,000

Source: Avaanz Ltd. (2026b) analysis using (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) (Niagara Region, 2022a).

Note: Dollar amounts are expressed in 2024 dollars.

Under the future fiscal baseline, municipal revenues and service costs both expand with residential growth. The infrastructure funding gaps documented in the existing baseline represent a pre-existing draw on municipal capital budgets independent of the project.

Set against this regional growth, the do-nothing baseline also entails a decline in the municipal assessment and tax revenue generated by the Walker site itself. Without the Phase 2 expansion, the South Landfill would close on reaching capacity and the landfill property-class assessment it carries would not be sustained, while the Southeast Quarry lands within the SSA would be worked out and rehabilitated to agriculture under the Aggregate Resources Act (Colville Consulting Inc., 2026), reducing the assessment and tax yield those lands presently support. Leachate volumes, and the associated discharge-fee revenue paid to Niagara-on-the-Lake, would likewise decline through the post-closure period (WSP Canada, 2026). The project's assessment, tax, and fee contributions are therefore measured against a fiscal baseline in which the site's own contribution to municipal revenue is contracting, even as residential growth elsewhere in the LSA expands the broader tax base.

4.2.5 Cost of Services

The South Landfill (Phase 1) is anticipated to reach 99% of its approved capacity by July 1, 2030 (WSP Canada, 2026). Without the proposed Phase 2 expansion, the South Landfill would close upon reaching capacity.

Closure would remove the Region's primary waste disposal facility. The residential waste streams currently managed under the partnership agreement with Walker would need to be redirected to Humberstone Road Landfill or exported, as Niagara Road 12 is approved only for waste generated within Grimsby, Lincoln, Pelham, and West Lincoln (GHD, 2024a). IC&I generators would lose access to the only local disposal facility with provincial service-area approval and sufficient capacity for large-volume commercial waste. Neither remaining regional landfill has the capacity to absorb the displaced tonnage. Concentrating the redirected residential volumes at Humberstone would accelerate its depletion beyond the timeline projected in the baseline.

Walker's Thorold drop-off depot, which receives residential self-hauled waste under the partnership agreement, is assumed to continue operating under the Do Nothing scenario, with waste received at the depot transferred to an alternative disposal facility rather than landfilled on site. The depot's economics currently benefit from the proximity of on-site disposal, so its continuation without the landfill is not assured; the assumption is conservative, as it understates the potential cost of the Do Nothing scenario to self-haul customers.

Without the project, the Region loses access to the facility that handles the majority of waste generated within its boundaries, at a time when regional growth is increasing waste generation. IC&I generators would have no cost-competitive local disposal option, and Humberstone, the only regional landfill able to accept the displaced residential waste, would face increased pressure on both capacity and service life.

4.2.6 Walker Campus Operations

Closure would curtail the employment and operational expenditures associated with landfill operations at the campus. Several campus operations do not depend on continued waste receipt and would continue, including the compost facility, the Walker Resource Recovery Area, which recovers wood waste, railway ties, asphalt shingles, and clean soils, and the biosolids facility. The South Landfill's gas is captured and converted to energy, supplying the Niagara Renewable Natural Gas Facility, which, 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). Under the do-nothing baseline, landfill gas generation from the closed Phase 1 landfill would peak shortly after closure and then decline over the following decades, so these renewable-energy operations, and the economic activity and emissions-offset benefits they support, would run on a diminishing gas supply through the post-closure period. Leachate discharge to Niagara-on-the-Lake would continue through the post-closure period at substantially reduced volumes once the final cover is in place (WSP Canada, 2026).

The future baseline combines the regional growth projected in the preceding sections with the closure of the South Landfill and the loss of the Region's primary waste disposal facility.

4.2.7 Future Baseline Physical Disturbances/ Nuisance Effects

In the future, without the South Landfill Phase 2 in operation at the Walker Niagara Campus, the existing South Landfill Phase 1 would close and the Southeast Quarry would be worked out and rehabilitated to agriculture under its Aggregate Resources Act licence. Residual nuisance effects would arise from continuing on-site operations (composting, resource recovery, and post-closure landfill management), other non-Walker land uses, and background conditions including regional traffic growth. The predicted nuisance values at the common receptor locations under these conditions are summarised in **Table 9**. These conditions describe the future of the LSA if the undertaking does not proceed and provide context for interpreting the predicted effects; they are not the baseline for the nuisance assessment. The net nuisance effects of the South Landfill Phase 2 expansion are assessed against the existing conditions summarised in **Table 4**, in which South Landfill Phase 1 and the quarry are operating together. Several of the changes described below, including the end of quarry dust and quarry truck traffic, would occur under either future.

All three baseline exceedances of the $120 \mu\text{g}/\text{m}^3$ 24-hour TSP criterion (CR08 Lakeview Cemetery, CR21 Royal Niagara Golf Club and CR19 Nearest Residence Southwest) are eliminated. Maximum 24-hour concentrations fall to between 51 and $55 \mu\text{g}/\text{m}^3$ and no receptor records an exceedance day over the five-year modelling period. Total odours fall below the 3 OU threshold at every receptor; the highest remaining 10-minute maximum is 2.1 OU at CR19 (Nearest Residence Southwest), compared with 6.8 OU under existing conditions.

Impulsive noise is no longer predicted at the common receptors. The landfill bird-scaring devices (banger, cracker and shotgun) end with the closure of South Landfill Phase 1.

Continuous noise declines at every common receptor except CR08 (Lakeview Cemetery), where the night level rises from 45 to 47 dBA while the daytime level declines. The largest change is at CR21 (Royal Niagara Golf Club), where daytime levels fall from 58 to 24 dBA as quarry processing ceases. The highest remaining levels are at CR08 (Lakeview Cemetery) and CR10 (Niagara/Thorold Patrol Yard and Police Fleet Centre), each at 48 / 47 dBA day / night, and at CR19 (Nearest Residence Southwest), at 44 / 43 dBA, reflecting the continuing campus operations and ambient sources represented in the closure-condition modelling; the remaining receptors record daytime levels of 31 dBA or below.

Table 9: Predicted Nuisance Values at Common Receptor Locations – Do Nothing (Future Baseline: South Landfill Phase 1 Closed, Quarry Rehabilitated, No Phase 2)

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	52; 0 days	Max 10-min OU: 1.3 Freq >1 OU: 0.1% \approx 9-hrs/yr	—	26 / 26	—	—
CR04	Nearest residences on Garner Rd	500-1000m	52; 0 days	Max 10-min OU: 0.9 Freq >1 OU: 0.0% \approx 0-hrs/yr	—	26 / 26	—	—
CR05	Nearest residence, South	<500m	52; 0 days	Max 10-min OU: 1.3 Freq >1 OU: 0.2% \approx 18-hrs/yr	—	31 / 30	—	—
CR06	Nearest residences West and City of Thorold urban boundary	>1000m	53; 0 days	Max 10-min OU: 0.9 Freq >1 OU: 0.0% \approx 0-hrs/yr	—	30 / 29	N/A	N/A
CR07	Nearest school: St. Vincent De Paul Catholic Elementary School	>1000m	52; 0 days	Max 10-min OU: 0.5 Freq >1 OU: 0.0% \approx 0-hrs/yr	—	22 / 21	—	—
CR08	Lakeview Cemetery	>1000m	55; 0 days	Max 10-min OU: 1.9 Freq >1 OU: 1.1% \approx 96-hrs/yr	—	48 / 47	—	—
CR10	Niagara Thorold Patrol Yard / Niagara Regional Police Fleet Centre	>1000m	53; 0 days	Max 10-min OU: 1.9 Freq >1 OU: 0.7% \approx 61-hrs/yr	—	48 / 47	—	—
CR11	Woodend Conservation Area	>1000m	52; 0 days	Max 10-min OU: 1.4 Freq >1 OU: 0.2% \approx 18-hrs/yr	—	25 / 25	—	—
CR12	Pine Tree Village Mobile Home Park	>1000m	52; 0 days	Max 10-min OU: 0.5 Freq >1 OU: 0.0% \approx 0-hrs/yr	—	19 / 19	N/A	N/A
CR13	Beechwood Golf & Social House	>1000m	52; 0 days	Max 10-min OU: 1 Freq >1 OU: 0.0% \approx 0-hrs/yr	—	29 / 29	—	—
CR14	Northwest Secondary Plan Area	>1000m	52; 0 days	Max 10-min OU: 0.6 Freq >1 OU: 0.0% \approx 0-hrs/yr	—	21 / 21	—	—
CR15	Niagara-on-the-Green Subdivision / Glendale Secondary Plan Area	>1000m	52; 0 days	Max 10-min OU: 1.1 Freq >1 OU: 0.0% \approx 0-hrs/yr	—	22 / 22	N/A	N/A
CR16	St Catharines	>1000m	52; 0 days	Max 10-min OU: 0.7 Freq >1 OU: 0.0% \approx 0-hrs/yr	—	24 / 23	N/A	N/A
CR17	Nearest residence Northeast and Gauld Nurseries	<500m	52; 0 days	Max 10-min OU: 0.8 Freq >1 OU: 0.0% \approx 0-hrs/yr	—	25 / 24	—	—

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)
CR18	Residences at South end of Garner Road	>1000m	52; 0 days	Max 10-min OU: 0.8 Freq >1 OU: 0.0% \approx 0-hrs/yr	—	27 / 26	—	—
CR19	Nearest Residence Southwest	>1000m	53; 0 days	Max 10-min OU: 2.1 Freq >1 OU: 0.8% \approx 70-hrs/yr	—	44 / 43	—	—
CR20	Residences east of Kalar Road	>1000m	51; 0 days	Max 10-min OU: 0.6 Freq >1 OU: 0.0% \approx 0-hrs/yr	—	22 / 22	N/A	N/A
CR21	Royal Niagara Golf Club	>1000m	53; 0 days	Max 10-min OU: 1.8 Freq >1 OU: 0.5% \approx 44-hrs/yr	—	24 / 22	N/A	N/A
R11	Residence (Boondocks Pet Resort)	500-1000m	52; 0 days	Max 10-min OU: 1.7 Freq >1 OU: 0.2% \approx 18-hrs/yr	—	—	—	—
R12	Service Station (adjacent Broad Street Cheesesteaks)	>1000m	52; 0 days	Max 10-min OU: 1.5 Freq >1 OU: 0.3% \approx 26-hrs/yr	—	—	—	—

Source: (RWDI AIR Inc., 2026c) (RWDI AIR Inc., 2026d)

Note: For total odours, any of the >1, >3 or >5 OU frequency thresholds not listed for a receptor is zero (no predicted exceedance). Impulsive noise is shown as "—" because the landfill pest-control devices cease with the closure of South Landfill Phase 1 and quarry ends with extraction; with no impulsive sources remaining, the RWDI Noise Detailed Impact Assessment makes no impulsive predictions for this condition. For traffic, South Landfill and quarry heavy-vehicle trips cease under the Do Nothing condition; the Transportation Detailed Impact Assessment quantifies Walker site trips as landfill and quarry heavy vehicles only, trips generated by the continuing campus operations are not quantified, and the Walker share of peak-hour traffic is therefore shown as "—" rather than zero.

Walker's landfill and quarry heavy-vehicle trips are removed from the road network, while non-heavy site trips associated with the continuing campus operations continue unchanged. The 28 AM and 27 PM peak-hour one-way landfill truck trips end with waste receipt, and the 14 AM and 13 PM peak-hour one-way quarry trips end as the quarry is worked out, with no further Walker heavy-vehicle trips on the assessed road segments. Background traffic growth of approximately 1% per year on Taylor Road and 2% per year on Thorold Stone Road continues, and with the landfill and quarry trips removed, traffic operations improve, primarily at the intersections immediately adjacent to the site, with the effects diminishing as traffic distributes through the surrounding network (TYLin, 2026b).

The visual condition changes from an operating landfill and quarry to a closed and rehabilitated landform: South Landfill Phase 1 is capped and revegetated, and the worked-out quarry is rehabilitated to an agricultural condition similar to pre-extraction capabilities under the Aggregate Resources Act licence (Colville Consulting Inc., 2026).

4.2.8 Summary of Future Baseline Conditions

The future existing conditions are the reference state for the economic, public-finance, and cost-of-services effects of the undertaking, whose net effect is the difference from this no-build future; the nuisance, business, and property-value effects are assessed against existing conditions, with these future conditions reported as context. Over the planning horizon, the LSA economy is projected to grow and diversify, supported by regional investment, land availability, and planned greenfield and intensification development, though near-term trade-policy and labour-market uncertainty weighs on the outlook. The real estate market is expected to remain supported by a persistent shortfall of housing supply relative to demand. Residential growth would expand municipal fiscal capacity across the LSA, even as the Walker site's own contribution to municipal assessment, tax, and discharge-fee revenue contracts with the closure of the South Landfill and the rehabilitation of the quarry lands to agriculture. The defining feature of the do-nothing baseline, however, is the loss of the Region's primary waste-disposal facility. On reaching capacity the South Landfill would close, leaving IC&I generators without a cost-competitive local disposal option and concentrating residual residential waste at the Humberstone Road Landfill, at a time when regional growth is increasing waste generation. Physical and nuisance disturbances in the LSA would generally fall below existing levels with the loss of the active landfill face and the quarry, leaving lower-level odour and noise from the continuing campus operations and ongoing background traffic growth as the principal residual effects. The sections that follow assess the economic, property-value, public-finance, and nuisance effects of the South Landfill Phase 2 within this context: a growing regional economy and population alongside the closure of the Region's primary disposal facility (South Landfill Phase 1).

5. Economic Net Effects

As described in Section 1, following the confirmation of the Preferred Landfill Configuration Option and the Preferred Leachate Management Option, these components, together with all other project elements that were consistent across the previously assessed alternative methods, collectively formed the "Preferred Method." The potential effects and associated mitigation or compensation measures identified were re-evaluated to confirm their validity in the context of the preliminary design. This review incorporated the refined engineering design details described in the FCR. For economics, this review was supported by the additional technical investigations described in Section 3, including the input-output economic modelling, the neighbourhood-level property value analysis, and the cost-of-services assessment.

The updated assessment of predicted potential effects is summarised in **Table 47** and further elaborated upon in the subsections that follow.

5.1 Potential Effects on Economics

The potential effects of the South Landfill Phase 2 on economics were evaluated against the four assessment criteria (effect on the local economy, effect on real estate, effect on public finance, and the cost of waste services), and both adverse and beneficial effects were identified. The potential effects, together with the indicators assessed under each criterion, are described in the subsections that follow and are summarised in **Table 47**.

Where a potential effect is governed by nuisance conditions, it is assessed at the common receptor locations and, where noted, the discipline-specific receptors identified under Common Receptor Locations, using the dust, odour, noise, and traffic predictions compiled in **Table 10** through **Table 12** and the landfill-visibility ratings at each receptor. The receptor-level findings established there are carried through the local-economy and real-estate analyses below and underpin the net effects reported for the common receptors.

5.1.1 Local Economy

The local economy assessment addresses two effects: the potential for the project to displace or disrupt existing businesses and farms in the LSA, and the economic contribution generated by constructing and operating the facility.

5.1.1.1 Displacement/Disruption of Business and/or Farms

Displacement occurs when the land required for a proposed undertaking physically removes an existing business or farm, or when operational effects become severe enough to compel relocation. Disruption is the lesser condition in which nuisance effects interfere with business or farm activity without necessarily causing closure or relocation. This section evaluates both possibilities for the proposed Phase 2 expansion.

The Phase 2 project footprint is located entirely within lands owned by Walker. No third-party property is required and no business or farm would be physically displaced. As detailed in the analysis below, the residual nuisance effects predicted by the discipline studies do not approach a severity that would constitute a major factor in business failure or relocation. No displacement of businesses or farms is anticipated as a result of the proposed undertaking.

The Agricultural Impact Assessment confirms that the expansion footprint is currently occupied by the existing quarry and associated soil stockpiles, and characterises these soils as disturbed, with no capability for common field-crop production. No active farm operations or agricultural buildings are present within the footprint, and the ancillary features of the proposal, including the residential waste and recycling drop-off and the Garner Road screening berm, are likewise located on Walker-owned land.

5.1.1.2 Disruption to Farms

As the footprint contains no active farm operations, the Agricultural Impact Assessment evaluates effects on the future agricultural end use rather than disruption to operating farms. The assessed effects relate to changes in Canada Land Inventory (CLI) soil capability arising from the rehabilitated landform's slope, changes to cold air drainage, and the amount of land available for a future agricultural end use. No mitigation measures are proposed or required. The net effects are limited to a minor reduction in agricultural capability relative to existing conditions, offset by an increase in the land available for a potential agricultural end use compared with the existing quarry rehabilitation plan and a slight improvement in suitability for specialty crops through changes to cold air drainage. No disruption to farm operations or productivity is anticipated.

5.1.1.3 Disruption to Businesses

Landfill operations can disrupt nearby businesses through several pathways. Nuisance effects, including odour, dust, noise, and visual intrusion, may interfere directly with business activity, deter customers, or degrade the working environment for employees. These effects are most relevant to the twelve businesses in the LSA that depend to some degree on outdoor amenity, customer experience, or environmental quality, which are considered in this assessment as potentially sensitive to landfill nuisance effects. Transportation-related effects are also relevant, as changes in truck traffic along haul routes can affect operating levels on the local road network and the movement of goods and customers. Finally, landfill expansion may alter the perceived character of the area, with potential consequences for commercial activity and development interest, a consideration of particular relevance to the hospitality and tourism sector in the LSA.

The following analysis draws on the nuisance effect predictions from the air quality, noise, visual, and transportation studies to assess the potential for disruption to businesses within the LSA, with particular attention to the twelve potentially sensitive businesses identified below.

5.1.1.4 Likely Physical Disturbances/ Nuisance Effects

Table 10 through **Table 12** present the predicted nuisance values at the common receptor locations, together with the two discipline-specific receptors closest to potentially sensitive businesses (R11, the residence at Boondocks Pet Resort, and R12, the service station and adjacent Broad Street Cheesesteaks), under each of the three operating scenarios assessed for the Phase 2 expansion, compiled from the odour, dust, noise, and traffic impact assessments; visual intrusion is addressed separately in the text. The predictions reflect the project design as modelled by each discipline; the continuous noise and visual results incorporate the proposed Garner Road berm extension, while the impulsive noise values are presented before the pest-control mitigation that the noise assessment recommends to address the predicted exceedances. Any further mitigation identified for a receptor that exceeds a criterion is noted in the discussion that follows.

Each table reports the predicted magnitude of every nuisance at each receptor. Predicted values are read against the applicable criteria: 120 µg/m³ for dust, reported in the tables as the count of days above this level over the five-year modelling period; 55 dBA daytime and 45 dBA nighttime for continuous noise; and 70 dBAI for impulsive noise. Odour is reported as the maximum predicted ten-minute concentration and as the percentage of time concentrations exceed 1, 3, and 5 OU. Under the MECP modelling guidance applied in the Air Quality assessment, odour above the 1 OU detection threshold is acceptable where it occurs less than 0.5% of the time; 1 OU is the level at which odour is generally first detectable and is not necessarily a nuisance, while 3 OU is the recognition threshold and 5 OU the annoyance threshold, with the 3 to 5 OU range associated with complaints. Traffic is reported as the count and share of Walker heavy-vehicle peak-hour trips, and visual intrusion is addressed qualitatively on the basis of landfill visibility, accounting for topography, screening, and the rising landfill profile over the operating life. Receptors at which a predicted value periodically exceeds its criterion are identified in the discussion that follows the tables.

A predicted value below its criterion does not imply the absence of perceptible change; it indicates that the effect falls below the level at which most people would experience frequent annoyance. The tabulated values are cumulative predictions for each scenario, reflecting the active sources across the Walker campus rather than the Phase 2 landfill in isolation; under Impact 1, for example, they include the closing Phase 1 landfill and the Quarry operating alongside the Phase 2 Stage 1. The incremental effect of the Phase 2 expansion is reflected in the change from the existing baseline conditions and in the progression across the three scenarios.

Predicted 24-hour TSP concentrations exceed the 120 µg/m³ criterion at three of the assessed receptor locations, and only under Impact 1: CR08 (Lakeview Cemetery) at 127 µg/m³ with a total of one exceedance day over the five-year modelling period, CR17 (residences and Gauld Nurseries northeast of the site) at 133 µg/m³, also with a total of one exceedance day, and CR21 (Royal Niagara Golf Club) at 182 µg/m³ with a total of sixteen exceedance days over the same period. Under Impact 2 and Impact 3, with the Quarry retired and the landfill working area shifted, the maximum predicted concentration falls to 94.5 µg/m³ (CR17) and no assessed receptor records an exceedance day over the five-year modelling period, so the criterion is met at every assessed

receptor location. The dust exceedance effect is therefore confined to the Impact 1 transitional period.

Table 10: Predicted Nuisance Values at Common Receptor Locations – Impact 1 (South Landfill Phase 1 Closing; Quarry and South Landfill Phase 2 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	114.1; 0 days	Max 10-min OU: 3.3 Freq >1 OU: 1.5% \approx 131-hrs/yr Freq >3 OU: 0.1% \approx 9-hrs/yr	61 / 53 / 65	49 / 39	24 (4.3%)	25 (3.5%)
CR04	Nearest residences on Garner Rd	500-1000m	96.4; 0 days	Max 10-min OU: 4.5 Freq >1 OU: 2.4% \approx 210-hrs/yr Freq >3 OU: 0.6% \approx 53-hrs/yr	59 / 48 / 53	48 / 41	0 (0.0%)	2 (1.9%)
CR05	Nearest residence, South	<500m	83; 0 days	Max 10-min OU: 4 Freq >1 OU: 1.4% \approx 123-hrs/yr Freq >3 OU: 0.1% \approx 9-hrs/yr	62 / 53 / 56	46 / 40	12 (0.7%)	7 (0.3%)
CR06	Nearest residences West and City of Thorold urban boundary	>1000m	90.7; 0 days	Max 10-min OU: 3.5 Freq >1 OU: 0.9% \approx 79-hrs/yr	57 / 50 / 64	43 / 34	—	—
CR07	Nearest school: St. Vincent De Paul Catholic Elementary School	>1000m	67.8; 0 days	Max 10-min OU: 2.2 Freq >1 OU: 0.5% \approx 44-hrs/yr	54 / 46 / 54	39 / 31	9 (0.5%)	10 (0.5%)
CR08	Lakeview Cemetery	>1000m	126.9; 1 days	Max 10-min OU: 7 Freq >1 OU: 4.0% \approx 350-hrs/yr Freq >3 OU: 0.7% \approx 61-hrs/yr Freq >5 OU: 0.2% \approx 18-hrs/yr	67 / 59 / 72	51 / 48	7 (8.0%)	6 (5.2%)
CR10	Niagara Thorold Patrol Yard / Niagara Regional Police Fleet Centre	>1000m	111.6; 0 days	Max 10-min OU: 7.2 Freq >1 OU: 2.4% \approx 210-hrs/yr Freq >3 OU: 0.5% \approx 44-hrs/yr Freq >5 OU: 0.1% \approx 9-hrs/yr	64 / 57 / 72	51 / 48	10 (8.6%)	8 (5.5%)
CR11	Woodend Conservation Area	>1000m	107.4; 0 days	Max 10-min OU: 4.1 Freq >1 OU: 1.3% \approx 114-hrs/yr Freq >3 OU: 0.1% \approx 9-hrs/yr	60 / 52 / 63	50 / 38	24 (4.3%)	25 (3.5%)
CR12	Pine Tree Village Mobile Home Park	>1000m	94.7; 0 days	Max 10-min OU: 2.1 Freq >1 OU: 0.4% \approx 35-hrs/yr	53 / 45 / 58	38 / 29	—	—
CR13	Beechwood Golf & Social House	>1000m	69.6; 0 days	Max 10-min OU: 2.7 Freq >1 OU: 0.3% \approx 26-hrs/yr	56 / 48 / 62	38 / 33	12 (4.0%)	17 (4.1%)
CR14	Northwest Secondary Plan Area	>1000m	88.8; 0 days	Max 10-min OU: 3.2 Freq >1 OU: 0.6% \approx 53-hrs/yr	56 / 48 / 58	43 / 33	9 (2.0%)	15 (3.0%)
CR15	Niagara-on-the-Green Subdivision / Glendale Secondary Plan Area	>1000m	89.8; 0 days	Max 10-min OU: 3.1 Freq >1 OU: 0.6% \approx 53-hrs/yr	56 / 48 / 61	43 / 32	—	—
CR16	St Catharines	>1000m	81.9; 0 days	Max 10-min OU: 2.2 Freq >1 OU: 0.4% \approx 35-hrs/yr	54 / 46 / 59	41 / 30	—	—

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	133.1; 1 days	Max 10-min OU: 2.9 Freq >1 OU: 1.4% \approx 123-hrs/yr	60 / 52 / 65	45 / 37	0 (0.0%)	0 (0.0%)
CR18	Residences at South end of Garner Road	>1000m	79.2; 0 days	Max 10-min OU: 2.9 Freq >1 OU: 0.8% \approx 70-hrs/yr	59 / 51 / 55	43 / 36	0 (0.0%)	2 (1.9%)
CR19	Nearest Residence Southwest	>1000m	105.9; 0 days	Max 10-min OU: 7.4 Freq >1 OU: 2.6% \approx 228-hrs/yr Freq >3 OU: 0.7% \approx 61-hrs/yr Freq >5 OU: 0.1% \approx 9-hrs/yr	65 / 57 / 72	48 / 44	14 (12.1%)	29 (20.0%)
CR20	Residences east of Kalar Road	>1000m	80.2; 0 days	Max 10-min OU: 2.7 Freq >1 OU: 0.7% \approx 61-hrs/yr	55 / 48 / 55	41 / 33	—	—
CR21	Royal Niagara Golf Club	>1000m	182.1; 16 days	Max 10-min OU: 5.7 Freq >1 OU: 2.3% \approx 201-hrs/yr Freq >3 OU: 0.5% \approx 44-hrs/yr Freq >5 OU: 0.1% \approx 9-hrs/yr	58 / 48 / 54	59 / 41	—	—
R11	Residence (Boondocks Pet Resort)	500- 1000m	85; 0 days	Max 10-min OU: 4.5 Freq >1 OU: 1.1% \approx 96-hrs/yr Freq >3 OU: 0.2% \approx 18-hrs/yr	—	—	—	—
R12	Service Station (adjacent Broad Street Cheesesteaks)	>1000m	87; 0 days	Max 10-min OU: 4.1 Freq >1 OU: 1.2% \approx 105-hrs/yr Freq >3 OU: 0.3% \approx 26-hrs/yr	—	—	—	—

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

Table 11: Predicted Nuisance Values at Common Receptor Locations – Impact 2 (South Landfill Phase 2 Operating; Quarry Ceased)

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	73.4; 0 days	Max 10-min OU: 2.2 Freq >1 OU: 1.4% \approx 123-hrs/yr	63 / 55 / 66	42 / 38	22 (3.9%)	24 (3.2%)
CR04	Nearest residences on Garner Rd	500-1000m	76.7; 0 days	Max 10-min OU: 2.5 Freq >1 OU: 1.9% \approx 166-hrs/yr	56 / 48 / 54	46 / 41	0 (0.0%)	2 (1.9%)
CR05	Nearest residence, South	<500m	66.8; 0 days	Max 10-min OU: 2.6 Freq >1 OU: 0.9% \approx 79-hrs/yr	54 / 47 / 56	40 / 37	12 (0.6%)	11 (0.5%)
CR06	Nearest residences West and City of Thorold urban boundary	>1000m	69.5; 0 days	Max 10-min OU: 2.3 Freq >1 OU: 0.5% \approx 44-hrs/yr	54 / 46 / 63	36 / 34	—	—
CR07	Nearest school: St. Vincent De Paul Catholic Elementary School	>1000m	59.2; 0 days	Max 10-min OU: 1.3 Freq >1 OU: 0.2% \approx 18-hrs/yr	55 / 47 / 53	35 / 31	8 (0.4%)	10 (0.4%)
CR08	Lakeview Cemetery	>1000m	88.7; 0 days	Max 10-min OU: 5.1 Freq >1 OU: 2.8% \approx 245-hrs/yr Freq >3 OU: 0.3% \approx 26-hrs/yr	59 / 49 / 73	49 / 47	7 (8.0%)	6 (5.2%)
CR10	Niagara Thorold Patrol Yard / Niagara Regional Police Fleet Centre	>1000m	81.7; 0 days	Max 10-min OU: 4.5 Freq >1 OU: 1.6% \approx 140-hrs/yr Freq >3 OU: 0.2% \approx 18-hrs/yr	59 / 50 / 71	49 / 48	10 (8.6%)	8 (5.5%)
CR11	Woodend Conservation Area	>1000m	73.1; 0 days	Max 10-min OU: 2.3 Freq >1 OU: 1.0% \approx 88-hrs/yr	62 / 54 / 65	41 / 37	22 (3.9%)	24 (3.2%)
CR12	Pine Tree Village Mobile Home Park	>1000m	77.6; 0 days	Max 10-min OU: 2.4 Freq >1 OU: 0.5% \approx 44-hrs/yr	55 / 49 / 58	35 / 32	—	—
CR13	Beechwood Golf & Social House	>1000m	60.2; 0 days	Max 10-min OU: 2 Freq >1 OU: 0.2% \approx 18-hrs/yr	53 / 45 / 62	34 / 31	12 (3.9%)	16 (3.8%)
CR14	Northwest Secondary Plan Area	>1000m	72.8; 0 days	Max 10-min OU: 2.4 Freq >1 OU: 0.9% \approx 79-hrs/yr	58 / 51 / 58	39 / 36	8 (1.7%)	11 (2.1%)
CR15	Niagara-on-the-Green Subdivision / Glendale Secondary Plan Area	>1000m	63.6; 0 days	Max 10-min OU: 1.6 Freq >1 OU: 0.4% \approx 35-hrs/yr	57 / 49 / 61	35 / 31	—	—
CR16	St Catharines	>1000m	63; 0 days	Max 10-min OU: 1.4 Freq >1 OU: 0.2% \approx 18-hrs/yr	53 / 45 / 59	33 / 28	—	—
CR17	Nearest residence Northeast and Gauld Nurseries	<500m	94.5; 0 days	Max 10-min OU: 5.5 Freq >1 OU: 2.4% \approx 210-hrs/yr Freq >3 OU: 0.48% \approx 42-hrs/yr	64 / 56 / 66	44 / 41	0 (0.0%)	0 (0.0%)
CR18	Residences at South end of Garner Road	>1000m	63.7; 0 days	Max 10-min OU: 1.7 Freq >1 OU: 0.5% \approx 44-hrs/yr	57 / 46 / 55	40 / 37	0 (0.0%)	2 (1.9%)

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 $>1 / >3 / >5 \text{ OU}$)	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)
CR19	Nearest Residence Southwest	>1000m	76.9; 0 days	Max 10-min OU: 5.2 Freq $>1 \text{ OU}$: 1.7% \approx 149-hrs/yr Freq $>3 \text{ OU}$: 0.2% \approx 18-hrs/yr	46 / 39 / 71	46 / 44	13 (11.2%)	30 (20.5%)
CR20	Residences east of Kalar Road	>1000m	66.4; 0 days	Max 10-min OU: 1.7 Freq $>1 \text{ OU}$: 0.6% \approx 53-hrs/yr	57 / 50 / 54	38 / 34	—	—
CR21	Royal Niagara Golf Club	>1000m	81; 0 days	Max 10-min OU: 3.2 Freq $>1 \text{ OU}$: 1.6% \approx 140-hrs/yr Freq $>3 \text{ OU}$: 0.1% \approx 9-hrs/yr	60 / 54 / 55	41 / 37	—	—
R11	Residence (Boondocks Pet Resort)	500-1000m	67; 0 days	Max 10-min OU: 3.2 Freq $>1 \text{ OU}$: 0.8% \approx 70-hrs/yr	—	—	—	—
R12	Service Station (adjacent Broad Street Cheesesteaks)	>1000m	68; 0 days	Max 10-min OU: 3.9 Freq $>1 \text{ OU}$: 0.8% \approx 70-hrs/yr Freq $>3 \text{ OU}$: 0.1% \approx 9-hrs/yr	—	—	—	—

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

Note: Impact 2 noise values represent the worst case across the Phase 2 operating sub-stages (Stage 2 and End of Stage 3).

Table 12: Predicted Nuisance Values at Common Receptor Locations – Impact 3 (End of Stage 4 – Peak Operational Extent)

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	75.1; 0 days	Max 10-min OU: 2.9 Freq >1 OU: 1.2% \approx 105-hrs/yr	64 / 54 / 66	42 / 38	13 (2.3%)	14 (1.9%)
CR04	Nearest residences on Garner Rd	500-1000m	70.9; 0 days	Max 10-min OU: 2.5 Freq >1 OU: 1.6% \approx 140-hrs/yr	66 / 54 / 53	45 / 42	0 (0.0%)	1 (0.9%)
CR05	Nearest residence, South	<500m	66.3; 0 days	Max 10-min OU: 2.9 Freq >1 OU: 0.7% \approx 61-hrs/yr	63 / 55 / 56	40 / 37	8 (0.4%)	6 (0.2%)
CR06	Nearest residences West and City of Thorold urban boundary	>1000m	68.6; 0 days	Max 10-min OU: 2.6 Freq >1 OU: 0.4% \approx 35-hrs/yr	55 / 47 / 63	33 / 30	—	—
CR07	Nearest school: St. Vincent De Paul Catholic Elementary School	>1000m	58.3; 0 days	Max 10-min OU: 1.3 Freq >1 OU: 0.1% \approx 9-hrs/yr	55 / 48 / 54	34 / 30	5 (0.3%)	6 (0.2%)
CR08	Lakeview Cemetery	>1000m	87.1; 0 days	Max 10-min OU: 4.5 Freq >1 OU: 2.2% \approx 193-hrs/yr Freq >3 OU: 0.1% \approx 9-hrs/yr	63 / 54 / 73	48 / 47	7 (8.3%)	6 (5.7%)
CR10	Niagara Thorold Patrol Yard / Niagara Regional Police Fleet Centre	>1000m	80.4; 0 days	Max 10-min OU: 3.4 Freq >1 OU: 1.4% \approx 123-hrs/yr	61 / 54 / 71	48 / 48	10 (9.2%)	8 (6.0%)
CR11	Woodend Conservation Area	>1000m	72.3; 0 days	Max 10-min OU: 2.3 Freq >1 OU: 1.1% \approx 96-hrs/yr	60 / 53 / 65	40 / 36	13 (2.3%)	14 (1.9%)
CR12	Pine Tree Village Mobile Home Park	>1000m	70.4; 0 days	Max 10-min OU: 2.3 Freq >1 OU: 0.4% \approx 35-hrs/yr	55 / 47 / 57	35 / 31	—	—
CR13	Beechwood Golf & Social House	>1000m	59.8; 0 days	Max 10-min OU: 1.9 Freq >1 OU: 0.2% \approx 18-hrs/yr	55 / 47 / 62	33 / 31	8 (2.6%)	10 (2.4%)
CR14	Northwest Secondary Plan Area	>1000m	64.1; 0 days	Max 10-min OU: 2.8 Freq >1 OU: 0.7% \approx 61-hrs/yr	58 / 50 / 57	39 / 35	5 (1.1%)	8 (1.6%)
CR15	Niagara-on-the-Green Subdivision / Glendale Secondary Plan Area	>1000m	65.4; 0 days	Max 10-min OU: 1.7 Freq >1 OU: 0.4% \approx 35-hrs/yr	56 / 48 / 61	33 / 28	—	—
CR16	St Catharines	>1000m	63.3; 0 days	Max 10-min OU: 1.3 Freq >1 OU: 0.1% \approx 9-hrs/yr	52 / 45 / 59	31 / 27	—	—
CR17	Nearest residence Northeast and Gauld Nurseries	<500m	87.7; 0 days	Max 10-min OU: 4.3 Freq >1 OU: 2.3% \approx 201-hrs/yr Freq >3 OU: 0.3% \approx 26-hrs/yr	63 / 54 / 65	44 / 39	0 (0.0%)	0 (0.0%)
CR18	Residences at South end of Garner Road	>1000m	62.2; 0 days	Max 10-min OU: 1.8 Freq >1 OU: 0.4% \approx 35-hrs/yr	60 / 52 / 55	39 / 35	0 (0.0%)	1 (0.9%)

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)
CR19	Nearest Residence Southwest	>1000m	76.3; 0 days	Max 10-min OU: 4.4 Freq >1 OU: 1.4% \approx 123-hrs/yr Freq >3 OU: 0.1% \approx 9-hrs/yr	56 / 45 / 72	45 / 43	7 (6.4%)	18 (13.4%)
CR20	Residences east of Kalar Road	>1000m	61.7; 0 days	Max 10-min OU: 1.7 Freq >1 OU: 0.4% \approx 35-hrs/yr	58 / 50 / 55	37 / 33	—	—
CR21	Royal Niagara Golf Club	>1000m	80.3; 0 days	Max 10-min OU: 2.8 Freq >1 OU: 1.6% \approx 140-hrs/yr	61 / 47 / 55	37 / 33	—	—
R11	Residence (Boondocks Pet Resort)	500-1000m	67; 0 days	Max 10-min OU: 2.8 Freq >1 OU: 0.7% \approx 61-hrs/yr	—	—	—	—
R12	Service Station (adjacent Broad Street Cheesesteaks)	>1000m	68; 0 days	Max 10-min OU: 3.2 Freq >1 OU: 0.6% \approx 53-hrs/yr	—	—	—	—

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

Predicted maximum ten-minute odour concentrations reach 7.4 OU at CR19 (Walker-owned residence southwest of the site), 7.2 OU at CR10 (Niagara Region facility on Old Thorold Stone Road), and 7.0 OU at CR08 (Lakeview Cemetery) under Impact 1, the highest values among the common receptors. Odour is assessed by the maximum predicted ten-minute concentration and by the frequency of excursions above the 1, 3, and 5 OU thresholds. Under Impact 1, the frequency above the 3 OU threshold is at or above 0.5% at five of the assessed receptor locations, CR04, CR08, CR10, CR19, and CR21, ranging from 0.5% (~44 hr/yr) to 0.7% (~61 hr/yr); this number falls to none under Impact 2 and Impact 3; the highest residual is CR17 at 0.48% (~42 hr/yr) under Impact 2, declining to 0.3% under Impact 3. The frequency above the 1 OU threshold exceeds 0.5% (~44 hr/yr) at sixteen of the assessed receptor locations under Impact 1, declining to thirteen and then twelve under Impacts 2 and 3, while exceedances above the 5 OU threshold remain rare throughout. This decline across the three impact scenarios indicates that landfill odour potential is greatest during the transitional period when the Quarry and South Landfill Phase 2 are operating together.

Predicted continuous sound levels remain below the 55 dBA nuisance criterion at all of the common receptor locations except CR21 (Royal Niagara Golf Club) under Impact 1, where the predicted daytime level is 59 dBA. The maximum predicted daytime level is 49 dBA (CR10) under Impact 2 and 48 dBA under Impact 3, and every common receptor location is below the 55 dBA criterion under both scenarios.

Predicted impulsive sound levels reach or exceed the 70 dBAI limit at three of the assessed receptor locations and persist across the operating scenarios: CR08 (Lakeview Cemetery), CR10 (Niagara Region facility), and CR19 (Walker-owned residence). The predicted level is 72 dBAI at all three receptors under Impact 1 and ranges from 71 to 73 dBAI under Impacts 2 and 3, driven by the shotgun pest-control device. The detailed noise assessment recommends relocating the shotgun toward the existing South Landfill entrance, where the elevated landfill mound provides shielding, or substituting a quieter device, either of which is predicted to remove the exceedance. None of the three affected receptors is an occupied third-party residential dwelling: CR08 is a cemetery, CR10 is an institutional facility, and CR19 is a Walker-owned property.

Walker heavy-vehicle peak-hour traffic forms its largest share of total volume on the low-volume rural roads, where baseline shares are 10.0% (CR08), 9.1% (CR10) and 9.1% (CR19). Under the operating scenarios this share remains elevated only at CR19 (Walker-owned residence southwest of the site), reaching 12.1% in the morning peak under Impact 1 on fourteen Walker trips against a total of 116. At CR08 and CR10 it falls to 8.0% and 8.6% (seven trips of 88 and ten of 116) as site-generated volumes hold flat against growing background traffic. On the higher-volume arterials serving the residential receptors, the Walker share is 4.3% or lower, for example 4.3% at CR01 and CR11. Walker peak-hour trips decline from the baseline across the three scenarios as landfill haulage replaces quarry-related heavy-vehicle movements; at CR01, the morning Walker volume falls from 42 trips at baseline to 24, 22, and 13 trips under Impacts 1, 2, and 3 respectively.

Visual intrusion is greatest when the landfill operations are above grade. While filling remains below grade, the landfill is rated fully obscured at every common receptor. Once operations rise above grade, the upper portion of the working face becomes partially visible above intervening topography and vegetation at the nearer receptors (CR01, CR05, CR07, CR17, CR18, and CR20). Existing vegetation and berms provide screening at these locations, the proposed Garner Road berm extension keeps CR04 fully obscured, the remaining receptors are rated fully obscured, and no receptor is assigned an unobstructed view of the landfill during operations (GHD, 2026b).

Across the nuisance categories, the predicted dust, odour and continuous-noise effects are greatest under Impact 1, when the closing Phase 1 landfill, the Quarry, and Phase 2 Stage 1 operate concurrently, and they decline through Impact 2 and Impact 3 as the Quarry is retired and operations consolidate within the landfill working face. The exceptions are odour at CR17, which peaks under Impact 2, when its frequency above the 3 OU threshold rises to 0.48% (~42 hr/yr) before easing under Impact 3, and impulsive pest-control noise, which does not decline across the operating scenarios and can be highest in the later stages. The receptors that periodically exceed a numerical nuisance criterion (dust, continuous sound, or impulsive sound) are CR08, CR10, CR17, CR19, and CR21. CR08 is a cemetery, CR10 an institutional facility, CR21 a golf course, and CR19 a residence owned by Walker; the fifth, CR17, represents Gauld Nurseries together with the nearest residence to the northeast, where the predicted dust exceedance is limited to a total of one day over the five-year modelling period under Impact 1. In addition, the frequency above the 3 OU threshold exceeds 0.5% at CR04, the receptor representing the nearest residences on Garner Road, reaching 0.6% (~53 hr/yr) under Impact 1, and falling below 0.5% (~44 hr/yr) under Impacts 2 and 3.

5.1.1.5 Business Impact Analysis

The nuisance effect predictions summarised in **Table 10** through **Table 12** indicate limited potential for the Phase 2 expansion to disrupt business operations in the LSA to a significant degree. Most businesses across the study area are industrial or commercial in character and are not sensitive to the low-to-medium nuisance levels predicted at their locations. Landfill-related truck traffic is not predicted to reduce road network levels of service to a degree that would impair commercial access, and no temporary road construction effects are anticipated. The analysis of sensitive businesses in the following subsection examines the twelve potentially sensitive businesses where disruption potential is highest.

Overall, no significant adverse effect on business operations in the LSA is anticipated during either the operational or post-closure periods of the Phase 2 expansion.

5.1.1.5.1 Potential Impact on LSA Sensitive Businesses

The following section comments on the anticipated impact on specific businesses identified as sensitive to landfill effects.

Table 13: Potentially Sensitive (Tourism-Related and Outdoor-Featured) Businesses in the LSA

Business	Location	Category	Outdoor and Tourism Features
Royal Niagara Golf Club	NNA	Outdoor Recreation	27-hole public golf course.
Broad Street Cheesesteaks	NNA	Food Service	Food truck with outdoor seating.
Gauld Nurseries	NNA	Nursery	Garden centre with outdoor growing and retail areas.
White Oaks Conference Resort and Spa	LSA boundary	Hospitality / Tourism	Conference resort and spa with overnight accommodation, outdoor patio dining, and event facilities.
Regency Athletic Resort	NNA	Hospitality / Outdoor Recreation	Athletic resort with overnight accommodation, outdoor sports fields, and patio restaurant.
Beechwood Golf & Social House	NNA	Outdoor Recreation	Semi-private 18-hole golf course.
Boondocks Pet Resort	NNA	Pet care	Pet boarding and daycare with outdoor animal areas.
The Inn at Lock Seven	Broader LSA (Downtown Thorold)	Hospitality / Tourism	Inn with overnight accommodation and outdoor balconies overlooking the Welland Canal.
Donnelly's Pub	Broader LSA (Downtown Thorold)	Hospitality / Live Entertainment	Pub with developed outdoor patio hosting weekly programmed live music series.
JC Patisserie	Broader LSA (Downtown Thorold)	Food Service	Pastry shop and café with seasonal street-side patio seating.
Bezo's Bar and Grill	Broader LSA (Downtown Thorold)	Food Service	Bar and grill with outdoor patio seating.
Perridiso Estate Winery	NNA	Winery	Winery with outdoor vineyard and outdoor tasting deck.

Each sensitive business is assessed at the receptor that most closely represents its location (the nearest common receptor or, for Broad Street Cheesesteaks and Boondocks Pet Resort, the air-quality receptor at or immediately beside the business), comparing the predicted values under the three impact scenarios with the existing-conditions baseline. These businesses already operate within an environment that experiences nuisances from the existing campus, including the operating Phase 1 landfill, the active Quarry, and composting, so the net effect of the Phase 2 project is the change from those baseline conditions. As the predictions show, the period of greatest potential change is the Impact 1 transitional period, when the Quarry and South Landfill

Phase 2 operate together; under Impacts 2 and 3, once the Quarry is retired, most nuisance values fall below the existing baseline.

Table 14: Net Effect on LSA Sensitive Businesses, by Representative Receptor

Business	Representative Receptor	Net effect vs existing baseline	Finding
Royal Niagara Golf Club	CR21 (course, ~1,146 m); clubhouse near CR15	Brief rise during Impact 1 (dust, odour); falls below baseline once the Quarry retires	No significant impact
Broad Street Cheesesteaks	R12 (adjacent)	Odour at or below baseline in all scenarios; dust below criterion	No significant impact
Gauld Nurseries	CR17 (~456 m; nearest)	Transitional dust rise; persistent odour above baseline, with the frequency above the 1 OU criterion rising from 0.9% to 2.4% under Impact 2 and persisting at 2.3% under Impact 3, and the frequency above 3 OU reaching 0.48% under Impact 2 and easing to 0.3% under Impact 3	Potential low adverse business effect; no viability threat
White Oaks Conference Resort & Spa	CR15 (~1,984 m)	Little change; values below criteria	No significant impact
Regency Athletic Resort	CR14 (~1,181 m)	Brief odour peaks above baseline; no sustained exceedance	No significant impact
Beechwood Golf & Social House	CR13 (~1,787 m)	Odour below baseline in all scenarios	No significant impact
Boondocks Pet Resort	R11 (at business)	Odour at or below baseline; dust below criterion	No significant impact
The Inn at Lock Seven	CR06 (~2,577 m)	Odour frequency not above baseline; isolated Impact 1 peak	No significant impact
Donnelly's Pub	CR06 (~2,577 m; property ~400 m beyond receptor)	Odour frequency not above baseline; isolated Impact 1 peak	No significant impact
JC Patisserie	CR06 (~2,577 m; property ~450 m beyond receptor)	Odour frequency not above baseline; isolated Impact 1 peak	No significant impact
Bezo's Bar and Grill	CR06 (~2,577 m; property ~490 m beyond receptor)	Odour frequency not above baseline; isolated Impact 1 peak	No significant impact
Perridiso Estate Winery	Not directly represented; nearest receptor CR17 (456 m from site), ~1 km from the winery	Exposure not directly characterised; low given distance	No significant impact

Royal Niagara Golf Club. The golf club is assessed at CR21, on the course itself ~1,146 m from the proposed Waste Disposal Site Boundary; its baseline already reflects the adjacent Quarry, including dust above the 120 µg/m³ criterion with a total of six exceedance days over the five-year

modelling period. The only predicted increase occurs during the Impact 1 transition, when dust peaks at $182 \mu\text{g}/\text{m}^3$ with a total of sixteen exceedance days over the same period, daytime sound changes little, while the maximum odour peaks at 5.7 OU and the frequency above 3 OU rises from approximately 0.4% to 0.5% of the time (35 to 44 hr/yr), for the duration of the transition only. Once the Quarry is retired, dust, sound, and odour all fall well below the existing baseline, with no exceedance days over the five-year modelling period under Impacts 2 and 3. The net effect is a brief transitional increase followed by a sustained reduction below existing conditions; no significant impact on this business is anticipated. The clubhouse and northern holes lie nearer CR15, where predicted dust and sound remain below their criteria and predicted odour shows negligible time above the 3 OU recognition threshold under all scenarios.

Broad Street Cheesesteaks. This food service operation with outdoor seating is assessed at air-quality receptor R12, directly adjacent to the business. The business opened in fall 2025, during South Landfill Phase 1 operations, so it was established under the existing baseline nuisance conditions. Proximity to the operating landfill was evidently not a deterrent to the business opening at its location. Predicted odour is at or below the existing baseline under every scenario, falling from a baseline maximum of 5.0 OU to 3.2 OU by Impact 3, and dust remains below the $120 \mu\text{g}/\text{m}^3$ criterion with no exceedance days over the five-year modelling period. Continuous and impulsive sound and traffic were not modelled at this air-quality receptor. No net adverse effect, and no disruption to the operation, is anticipated.

Gauld Nurseries. This outdoor garden centre is assessed at CR17, ~456 m northeast of the proposed Waste Disposal Site Boundary and the nearest sensitive business to the site. Dust rises during the Impact 1 transition to $133 \mu\text{g}/\text{m}^3$, with a total of one exceedance day over the five-year modelling period, most of it landfill-sourced, before falling below baseline once Stage 1 is complete. Gauld Nurseries is the one sensitive business at which a persistent increase in landfill odour above existing conditions is predicted. The maximum ten-minute concentration rises from a baseline of 2.5 OU to 5.5 OU under Impact 2 (+3.0 OU) and 4.3 OU under Impact 3, and the frequency above the 3 OU threshold rises from none at baseline to 0.48% of the time (~42 hr/yr) under Impact 2 before easing to 0.3% (~26 hr/yr) under Impact 3 as filling progresses away from the receptor. The frequency above the lower 1 OU detection criterion rises further, from 0.9% (~79 hr/yr) at baseline to 2.4% (~210 hr/yr) under Impact 2, and persists at 2.3% (~201 hr/yr) under Impact 3. Continuous and impulsive sound remain below their criteria and Walker traffic is negligible. This is identified as a potential low adverse business effect: a nuisance at an outdoor commercial operation, rather than a constraint on productivity or viability. It is the one location at which the project is predicted to increase odour exposure above existing conditions on a persistent basis.

White Oaks Conference Resort and Spa. The resort is assessed at CR15, ~1,984 m north of the proposed Waste Disposal Site Boundary, with an additional ~450 m to the start of the resort property, so the predictions at CR15 are conservative for this business. Predicted values change little from baseline: odour peaks at 3.1 OU under Impact 1 before falling below baseline, with negligible time above the 3 OU recognition threshold, dust records no exceedance days over the

five-year modelling period, and no Walker traffic uses its road segment. No significant change from existing conditions, and no significant impact on this business, is anticipated.

Regency Athletic Resort. The resort, with outdoor sports fields and a patio restaurant, is assessed at CR14, ~1,181 m east of the proposed Waste Disposal Site Boundary. Odour rises above its existing baseline as brief peaks, reaching 3.2 OU under Impact 1, but the frequency above 3 OU remains nil under every scenario; the change is an isolated peak rather than recurring exposure. Dust records no exceedance days over the five-year modelling period, Walker traffic is a small and declining share of the peak hour, and the landfill is rated fully obscured at this receptor throughout operations. No significant impact on this business is anticipated.

Beechwood Golf & Social House. The course is assessed at CR13, ~1,787 m south of the proposed Waste Disposal Site Boundary. Predicted odour falls below the existing baseline under every scenario, dust records no exceedance days over the five-year modelling period, continuous and impulsive sound remain below their criteria, and Walker traffic is a small share of the peak hour. No net adverse effect, and no significant impact on this business, is anticipated.

Boondocks Pet Resort. This largely outdoor pet boarding facility is assessed at air-quality receptor R11, located at the business. Predicted odour falls under every scenario, from a baseline maximum of 5.1 OU to 2.8 OU by Impact 3, with the frequency above 3 OU no higher than the existing condition and reaching none by Impact 2; dust remains below the 120 µg/m³ criterion with no exceedance days over the five-year modelling period. Continuous and impulsive sound and traffic were not modelled at this air-quality receptor; at CR05, the nearest common receptor, continuous sound is below the 55 dBA criterion and Walker traffic is negligible. No net adverse effect on this business is anticipated.

The Inn at Lock Seven. The inn, on the west side of the Welland Canal, is assessed at CR06, ~2,577 m from the proposed Waste Disposal Site Boundary. The frequency of odour exposure does not increase above baseline under any scenario; the maximum ten-minute concentration rises only as an isolated Impact 1 peak of 3.5 OU before returning to near baseline, with no time above 3 OU at any point. All other values remain below their criteria, the landfill is fully screened, and no Walker traffic is predicted on the receptor's roads. No significant change from existing conditions, and no significant impact on this business, is anticipated.

Donnelly's Pub, JC Patisserie, and Bezo's Bar and Grill. These three businesses in the commercial core of Downtown Thorold are assessed at the same receptor, CR06, ~2,577 m from the proposed Waste Disposal Site Boundary, with the properties lying roughly a further 400 to 490 m beyond the receptor and their outdoor patios the features most sensitive to nuisance effects. Donnelly's Pub, the nearest of the three and the business with the most extensive patio and outdoor offering, represents the most sensitive case. The frequency of odour exposure does not rise above existing conditions under any scenario, and the only change is the same isolated Impact 1 peak, so there is no net change in odour exposure at the patio. Dust and sound remain below their criteria and the landfill is not visible from these locations. With no significant impact anticipated at the most exposed of the three, that conclusion extends to JC Patisserie and Bezo's

Bar and Grill, whose outdoor seating is more limited, in JC Patisserie's case a seasonal street-side patio; no significant impact on any of these businesses is anticipated.

Perridiso Estate Winery. The winery, on Warner Road south of the Queen Elizabeth Way, is not directly represented by any receptor; the nearest, CR17, lies ~1 km away, so its nuisance exposure cannot be characterised directly from the assessment. Given that separation, and the greater distance again to the proposed Waste Disposal Site Boundary, nuisance effects at the winery are expected to be low; no significant impact is anticipated.

5.1.1.5.2 Summary of Effects on Sensitive Businesses

Across the twelve sensitive businesses, the existing-conditions baseline is already influenced by the operating Phase 1 landfill, the Quarry, and other campus sources, and the net effect of the Phase 2 project is generally small. Under Impacts 2 and 3 the predicted odour and dust at most businesses fall below existing conditions, largely reflecting the closure of South Landfill Phase 1 and the retirement of the Quarry over the same period, and at Broad Street Cheesesteaks and Boondocks Pet Resort the predicted odour is at or below baseline under every scenario. The transitional Impact 1 period produces temporary increases above baseline, principally the dust at the receptors nearest the site. Odour at the Regency Athletic Resort also remains modestly above its low baseline beyond the transition, as occasional peaks with no time above the 3 OU threshold. The principal exception is Gauld Nurseries, the nearest sensitive business, where a persistent increase in landfill odour above existing conditions is predicted. The frequency above the 3 OU threshold rises from none at baseline to 0.48% under Impact 2 (~42 hr/yr), before easing to 0.3% (~26 hr/yr) under Impact 3. This is identified as a potential low adverse business effect, but not of a magnitude to threaten the productivity or viability of the nursery. The effect is carried forward for mitigation in Section 5.2. No sensitive business is displaced, and none is predicted to experience disruption sufficient to threaten its productivity or viability as a result of the proposed undertaking.

5.1.1.5.3 Outdoor Industrial Operations in the Near Neighbours Area

Beyond the twelve potentially sensitive businesses, two industry businesses within the NNA with outdoor operations were considered: Rankin Construction's Thorold Asphalt plant on Thorold Townline Road and Niagara Ready Mix on Old Thorold Stone Road, at both of which employees work outdoors. Rankin Asphalt has operated in the area for more than twenty years, since well before the South Landfill Phase 1 began operating in 2009, and is therefore familiar with the conditions of the existing nuisance environment. Niagara Ready Mix was established in August 2024, during Phase 1 operations. That a new business chose to locate at this site during active landfilling indicates the existing nuisance conditions were not a constraint on that decision.

Considered against the assessment criteria, neither operation is predicted to experience a significant change from existing conditions. At R14, the air-quality closest to the Rankin plant, dust remains well below the 120 µg/m³ criterion with no exceedance days over the five-year modelling period, and the maximum ten-minute odour concentration falls below the existing baseline under every scenario, with the frequency above the 3 OU recognition threshold falling from 0.1% at

baseline to none. At CR10, the common receptor nearest Niagara Ready Mix, ~600 m from the property, the frequency of odour above 3 OU does not rise above its baseline of 0.6% under any scenario, declining to none by Impact 3; dust records no exceedance days; and sound changes are limited to transitional increases of 1 to 2 dB, returning to or below baseline levels by Impact 3.

5.1.1.6 Economic Effects of Waste Disposal Facility Construction and Operation

Throughout this section, geographies are reported cumulatively: the LSA total stands alone, the RSA total includes the LSA, and the Ontario total includes both. GDP and product and production taxes are reported at the supplier's place of work, while FTE jobs, labour income, and personal income tax are reported at the worker's place of residence; because some workers at LSA and RSA suppliers live elsewhere, retention of these place-of-residence measures is lower than for GDP.

None of the expenditures or economic effects quantified in this section would arise under the Do Nothing condition, in which the South Landfill closes on reaching capacity; the quantified effects are therefore attributable to the project in their entirety.

5.1.1.6.1 Capital Expenditures

The South Landfill Phase 2 requires capital expenditure for construction, beginning before operations start and continuing across the operating life of the landfill. Operations (waste receipt) are anticipated to begin July 1, 2030, with the landfill developed in four stages over an approximately 20-year operational life and closure anticipated in approximately 2050 (WSP Canada, 2026). Prior to the start of operations, pre-operations infrastructure must be constructed including the Taylor Road under-pass, internal roads, the leachate pump station and forcemain, pre-treatment lagoons, stormwater management, employee facilities, and the first landfill cells required for operations to start. With the exception of these initial one-time construction activities, capital expenditures will be incurred over the approximately 20-year operational life of the landfill, during which additional landfill cells, liner systems, and gas collection infrastructure are constructed yearly as the landfill progresses through its four developmental stages. This capital expenditure is concentrated locally: an estimated 62.9% is incurred within the LSA, rising to 65.6% within the wider Niagara Region and 98.6% within Ontario as a whole, with the remaining 1.4% incurred outside the province. Walker plans to subcontract the labour and equipment requirements for the landfill construction activities.

Direct effects represent economic activity at the immediate supplier providing each good or service to the project, including on-site activity and at the project's direct contractors and equipment suppliers. Indirect effects represent the supply chain of those direct suppliers: the goods and services they purchase to support their work on the project. Induced effects represent the re-spending of labour income by workers engaged in direct and indirect activity.

As shown in **Table 15**, the capital construction is estimated to generate total economic effects of \$249 million in GDP, \$132 million in labour income, and 1,394 full-time equivalent (FTE) jobs across Ontario, including \$23 million in personal income tax revenue and \$18 million in product and production tax revenue. Of these Ontario effects, the LSA captures \$149 million in GDP, \$59

million in labour income, and 599 FTE jobs; the RSA captures \$161 million in GDP, \$75 million in labour income, and 764 FTE jobs. Direct effects account for the majority of GDP in each geography (72% in the LSA, 70% in the RSA, 60% in Ontario), with indirect and induced effects from supply chain purchases and household spending contributing the balance.

Table 15: Total Capital Economic Effects by Study Area

		Direct	Indirect	Induced	Total
LSA	GDP	\$107,603,000	\$22,281,000	\$19,488,000	\$149,371,000
	Labour Income	\$39,341,000	\$10,869,000	\$8,966,000	\$59,177,000
	FTE Jobs	358	112	129	599
	Income Tax	\$6,862,000	\$1,896,000	\$1,564,000	\$10,322,000
	Product and Production Taxes	\$2,762,000	\$961,000	\$5,037,000	\$8,760,000
RSA	GDP	\$112,348,000	\$23,611,000	\$24,786,000	\$160,745,000
	Labour Income	\$50,021,000	\$13,859,000	\$11,404,000	\$75,284,000
	FTE Jobs	457	143	164	764
	Income Tax	\$8,725,000	\$2,417,000	\$1,989,000	\$13,131,000
	Product and Production Taxes	\$2,826,000	\$1,018,000	\$6,407,000	\$10,251,000
Ontario	GDP	\$149,716,000	\$54,899,000	\$44,231,000	\$248,846,000
	Labour Income	\$78,767,000	\$33,245,000	\$20,368,000	\$132,381,000
	FTE Jobs	756	346	292	1,394
	Income Tax	\$13,739,000	\$5,799,000	\$3,553,000	\$23,090,000
	Product and Production Taxes	\$3,767,000	\$2,365,000	\$11,439,000	\$17,571,000

Source: (Avaanz Ltd., 2026b)

Note: GDP and Product and Production Taxes are allocated to the supplier's place of work; FTE Jobs, Labour Income, and Personal Income Tax are allocated to the worker's place of residence.

Local retention of total economic effects (direct, indirect and induced) is substantial. As shown in **Table 16**, the LSA captures between 43.0% and 60.0% of the Ontario-level effects across the five metrics, with retention rising to between 54.8% and 64.6% when the broader Niagara Region (RSA) is included. The remainder is generated by suppliers and workers located elsewhere in Ontario.

Table 16: Retention of Capital Economic Effects (% of Ontario Total)

Measure	LSA	RSA
GDP	60.0%	64.6%
Labour Income	44.7%	56.9%
FTE Jobs	43.0%	54.8%
Income Tax	44.7%	56.9%
Product and Production Taxes	49.9%	58.3%

Source: (Avaanz Ltd., 2026b)

5.1.1.6.2 Operating Expenditures

The South Landfill Phase 2 incurs operating expenditure each year throughout the approximately 20-year operational life of the landfill. Walker's on-site operational workforce includes 16 direct staff classified within the waste management and remediation services industry, comprising equipment operators, scale house staff, ground maintenance staff and labourers, and site supervisors and administrative personnel. Site operations are further supported by subcontracted personnel working on-site through specialist firms providing environmental services, on-site site works (including daily fill operations, cover material placement, and earthworks), equipment service, and property maintenance. Additional off-site activity is generated through procurement of materials, fuel, transportation, professional services, utilities, insurance, royalties, and consumables. This operating expenditure is overwhelmingly local: an estimated 91.3% is incurred within the LSA. Because essentially all local procurement falls within the LSA itself, the share within the wider Niagara Region is the same 91.3%, rising to 98.0% within Ontario as a whole, with the remaining 2.0% incurred outside the province (Avaanz Ltd., 2026; Walker Environmental Group, 2026b).

The economic effects of the annual operating expenditures are summarised in **Table 17** across the three nested geographies, using the same direct, indirect, and induced framework introduced in the Capital section. The annual operations are estimated to generate total economic effects of \$12.5 million in GDP, \$7.2 million in labour income, and 84 full-time equivalent (FTE) jobs across Ontario each year, including \$1.3 million in personal income tax revenue and \$0.9 million in product and production tax revenue. Of these Ontario-wide effects, Walker directly employs 16 on-site staff, supported by subcontracted on-site specialists; the remaining direct, indirect, and induced FTEs are supported at supplier firms across the Niagara Region and the rest of Ontario. The LSA captures \$10.3 million in GDP, \$4.7 million in labour income, and 56 FTE jobs; the RSA captures \$10.8 million in GDP, \$6.0 million in labour income, and 71 FTE jobs. Direct effects account for the majority of GDP in each geography (74% in the LSA, 71% in the RSA, 65% in Ontario), with indirect and induced effects from supply chain purchases and household spending contributing the balance.

Table 17: Annual Operating Economic Effects by Study Area

		Direct	Indirect	Induced	Total
LSA	GDP	\$7,676,000	\$1,060,000	\$1,576,000	\$10,312,000
	Labour Income	\$3,488,000	\$518,000	\$723,000	\$4,728,000
	FTE Jobs	40	6	10	56
	Income Tax	\$608,000	\$90,000	\$126,000	\$825,000
	Product and Production Taxes	\$146,000	\$52,000	\$408,000	\$607,000
RSA	GDP	\$7,676,000	\$1,139,000	\$1,997,000	\$10,811,000
	Labour Income	\$4,398,000	\$667,000	\$916,000	\$5,980,000
	FTE Jobs	50	8	13	71
	Income Tax	\$767,000	\$116,000	\$160,000	\$1,043,000
	Product and Production Taxes	\$146,000	\$56,000	\$517,000	\$719,000
Ontario	GDP	\$8,103,000	\$1,961,000	\$2,401,000	\$12,465,000

	Direct	Indirect	Induced	Total
Labour Income	\$4,869,000	\$1,220,000	\$1,102,000	\$7,191,000
FTE Jobs	55	14	16	84
Income Tax	\$849,000	\$213,000	\$192,000	\$1,254,000
Product and Production Taxes	\$198,000	\$99,000	\$622,000	\$919,000

Source: (Avaanz Ltd., 2026b)

The majority of total annual economic effects (direct, indirect and induced) are retained locally. As shown in **Table 18**, the LSA captures between 65.8% and 82.7% of the Ontario-level effects across the five metrics, with retention rising to between 78.2% and 86.7% when the broader RSA is included. The remainder is generated by suppliers and workers located elsewhere in Ontario.

Table 18: Retention of Operating Economic Effects (% of Ontario Total)

Measure	LSA	RSA
GDP	82.7%	86.7%
Labour Income	65.8%	83.2%
FTE Jobs	66.6%	83.9%
Income Tax	65.8%	83.2%
Product and Production Taxes	66.0%	78.2%

Source: (Avaanz Ltd., 2026b)

5.1.1.6.3 Effects on Industry Sector Growth Trends

The project's expenditures flow into LSA and RSA suppliers through three streams. An initial construction package draws on local heavy and civil engineering construction, specialty trade contracting, non-residential building construction, and engineering design services to prepare the facility for operations. Ongoing capital expenditure for progressive cell construction, gas system expansion, and infrastructure maintenance continues throughout the twenty-year operational life and is captured locally in heavy and civil construction, specialty trades, and aggregate mining and quarrying. The annual operating budget is almost entirely captured within the LSA, flowing into equipment repair and maintenance, environmental engineering and consulting, petroleum and chemical wholesale, waste collection, legal services, building and laundry services, and utilities, plus the Host Community Fee and property taxes paid to local public administration.

The Existing Conditions Report establishes that the principal LSA and RSA supplier industries have been growing through the 2018 to 2024 baseline period. Construction employment grew by 8.1% in the LSA and 10.3% in the RSA, wholesale trade by 5.4% and 6.9%, and higher-wage professional services were among the industries identified as expanding in the business climate interviews. The project reinforces these growth trends. The exception is mining and quarrying, which contracted by 25.0% in the LSA and 8.8% in the RSA over the same period. For this industry, sustained project demand for sand, clearstone, granular fill, and stone provides ongoing support that partially offsets baseline decline rather than reinforcing growth.

The project's effects on LSA and RSA suppliers sit within the scale of baseline industry activity. The annual operating effects reported in **Table 17**, together with capital expenditure that adds further LSA-attributable activity through the local construction, engineering, and aggregate supply chains throughout the operational life, are a small fraction of the LSA's baseline economic activity characterised in the Existing Conditions Report. The project's contribution is material at the firm level for the contractors, suppliers, and host municipalities that receive project expenditure across the operational life, but it does not reach a magnitude sufficient to alter the growth trend of any individual industry in the LSA or the RSA.

5.1.1.6.4 Effects on Business Opportunities

The project sustains and expands opportunities for local businesses. Walker's existing South Landfill is already supplied predominantly by local firms, with the majority of its external procurement spending placed within the Niagara Region, and the assessment carries this established local-sourcing pattern forward rather than assuming industry-average leakage.

The project's capital and operating expenditures create contract opportunities for local contractors and suppliers. The capital program is substantial and, apart from an initial pre-operations build, is incurred progressively over the roughly 20-year operational life as additional cells, liner and leachate-collection systems, and gas-collection infrastructure are constructed, while the annual operating budget recurs over the same period. In addition, wages earned at the project and its suppliers are re-spent locally, supporting area retail and service businesses. These opportunities are reflected in the indirect and induced effects, the majority of which are retained within the LSA and RSA.

On balance, the project has a beneficial effect on local business opportunities.

5.1.1.6.5 Effects on the Labour Market

The project will place demands on the local labour supply through its capital and operating expenditures. Walker plans to subcontract the labour and equipment requirements of the capital program, while operations will be staffed by a combination of Walker employees and subcontracted on-site specialists, with 16 staff directly employed by Walker. Each expenditure stream's direct, indirect, and induced employment is quantified in the input-output results above. Demand from the capital program does not arrive as a single peak; the Facility Characteristics Report indicates an initial pre-operations build followed by progressive cell construction across four roughly five-year stages, spreading the capital works in planned increments over the operational life.

The Existing Conditions Report describes the market these demands fall on in some detail. Trades, transport and equipment operators, the occupational group most relevant to the project, has grown in both the LSA and RSA since 2018 and carried an average wage of \$67,400 in 2024. Interviewed organisations nonetheless characterised construction labour as exceptionally tight, with major institutional and industrial investment projects, alongside ongoing residential and infrastructure construction, expected to sustain high labour requirements for several years.

Shortages were identified specifically in skilled trades and manufacturing, with a skills mismatch leaving youth unemployment elevated even as employers struggle to find qualified workers, and housing affordability and transportation cited as barriers to attracting and retaining staff.

These conditions have one practical implication for the project. Walker’s construction staging and subcontract procurement will need to be planned around the peak activity of competing projects, particularly for the pre-operations build that precedes the 2030 opening. Set against this baseline, the demand is modest. Annual operating employment amounts to well under one percent of LSA employment in the relevant occupational category, and the capital program’s employment, presented in the input-output results as a total over the full construction program, is spread across the staged 20-year schedule rather than concentrated in any single year. The labour requirements can be met from within the existing LSA and RSA workforce without materially constraining the labour available to other employers.

5.1.1.6.6 Household Spending

The labour income generated by the proposed landfill enables consumer spending on goods and services that supports local commercial activity. Total labour income (direct, indirect, and induced) generated by the project over the twenty-year operational life, less federal and provincial income tax revenues calculated within the input-output model and less 9% allocated to personal insurance, pension contributions, gifts, and charitable contributions, is applied against the Ontario household spending profile presented in the Existing Conditions Report. The resulting dollar allocations to consumer expenditure categories are shown in

Table 19, broken down by geography across the LSA, RSA, and Ontario as a whole.

Table 19: Distribution of Project Generated Post-Income Tax Labour Income in LSA (Millions) (2026\$)

Category	LSA	RSA	Ontario
Food	\$16,578,000	\$21,015,000	\$29,782,000
Shelter	\$41,293,000	\$52,346,000	\$74,182,000
Household operations and furnishings	\$13,845,000	\$17,551,000	\$24,872,000
Clothing and accessories	\$4,377,000	\$5,548,000	\$7,863,000
Transportation	\$16,815,000	\$21,315,000	\$30,207,000
Health and personal care	\$6,865,000	\$8,702,000	\$12,332,000
Recreation	\$7,296,000	\$9,249,000	\$13,107,000
Education	\$2,864,000	\$3,631,000	\$5,145,000
Other	\$5,550,000	\$7,036,000	\$9,971,000
Total Expenditures	\$115,483,000	\$146,393,000	\$207,461,000

Source: (Avaanz Ltd., 2026b)

Note: Geographic values are reported cumulatively. The LSA is included in the RSA total, and the LSA and the RSA are both included in the Ontario total.

Consumer expenditures shown are inclusive of harmonized sales tax (HST), reflecting Statistics Canada's measurement of household expenditure as paid. Assuming that the geographic distribution of household spending mirrors the geographic allocation of labour income, approximately \$115.5 million (55.7%) will be spent within the LSA, \$146.4 million (70.6%) within the RSA, and \$207.5 million across Ontario as a whole.

Within the LSA, shelter spending would flow to landlords, utility providers, and housing-related services; transportation spending to fuel retailers, automotive sales and services, and transit operators; food spending to grocery stores, supermarkets, and food service establishments; and household operations and furnishings spending to home goods retailers and household service providers. Smaller allocations to clothing and accessories, health and personal care, recreation, education, and other categories would support corresponding retailers and service providers across the LSA and the broader RSA. Personal insurance, pension contributions, gifts, and charitable contributions, excluded from the consumer expenditure allocation, support the financial services and charitable sectors at the provincial or national scale rather than local commercial activity in the LSA and RSA.

5.1.1.7 Summary of Potential Effects on the Local Economy

The project's potential effects on the local economy run in both directions, and the indicators are reported separately rather than combined into a single rating. Four indicators are beneficial: business opportunities, employment, GDP, and the retention of economic benefits within the local economy. The disruption indicator is adverse but small: no business or farm is displaced, and for all but one of the twelve sensitive businesses the predicted changes are confined to the transitional Impact 1 period or fall below existing conditions.

Table 20 assesses each of the five local-economy indicators established in the ToR against the four dimensions used to characterize effects: magnitude, geographic extent, duration, and likelihood and confidence. Magnitude is measured against the modelled economic effects for the beneficial indicators and against the discipline nuisance criteria for the disruption indicator.

Table 20: Local Economy Potential Effects by Indicator

Indicator	Assessment
Disruption/ displacement of businesses (including tourism and farms)	<p>Low adverse.</p> <ul style="list-style-type: none"> Magnitude: no business or farm displaced (footprint entirely Walker-owned); predicted nuisance effects remain below the level that would threaten any business's viability. The largest transitional change is dust at the Royal Niagara Golf Club under Impact 1 (sixteen exceedance days over five years); the one persistent increase is odour at Gauld Nurseries (CR17), where the frequency above the 1 OU criterion rises from 0.9% to 2.4% under Impact 2 and persists at 2.3% under Impact 3, while the frequency above 3 OU reaches 0.48% under Impact 2 before easing to 0.3% under Impact 3. No farm disruption (footprint not in agricultural production); tourism is assessed through the tourism-related businesses in the sensitive-business set, none of which shows a significant impact.

Indicator	Assessment
	<ul style="list-style-type: none"> • Geographic extent: LSA; persistent change at one of the twelve potentially sensitive businesses. • Duration: dust, continuous noise, and most odour effects are concentrated in the transitional Impact 1 period; the Gauld Nurseries odour increase continues beyond it, and the impulsive noise persists across scenarios at three non-business locations (a cemetery, an institutional facility, and a Walker-owned residence). Visual change is greatest above grade. • Likelihood and confidence: high; discipline study predictions are conservative maxima and the baseline reflects the operating campus. One business (Perridiso Estate Winery) is not directly represented by a receptor; its low exposure is inferred from distance.
Business opportunities	<p>Low Positive.</p> <ul style="list-style-type: none"> • Magnitude: the capital program and annual operating budget create recurring contract and procurement opportunities. • Geographic extent: predominantly local firms; 62.9% of capital and 91.3% of operating expenditure incurred in the LSA. • Duration: long term; initial pre-operations build, then progressive cell construction and annual operating spending over the ~20-year operational life. • Likelihood and confidence: high; Walker’s budgets and established local procurement record.
Impact on direct, indirect, and induced employment	<p>Low Positive.</p> <ul style="list-style-type: none"> • Magnitude: ~1,394 FTE across Ontario over the construction program; ~84 FTE/yr during operations, under 1% of relevant LSA occupational employment. • Geographic extent: 16 staff directly employed by Walker; LSA captures 56 of the 84 annual operating FTEs; remainder at supplier firms across Niagara and Ontario. • Duration: long term; operating employment recurs over the ~20-year operational life, and construction demand is spread across the staged schedule rather than concentrated in any single year. • Likelihood and confidence: high; the risk is scheduling around competing projects in a tight construction labour market, not the scale of the effect.
Impact on direct, indirect, and induced GDP	<p>Low Positive.</p> <ul style="list-style-type: none"> • Magnitude: ~\$249M GDP and ~\$132M labour income (Ontario) over the construction program; ~\$12.5M GDP and ~\$7.2M/yr labour income during operations; direct effects account for the majority of GDP; material at the firm level while remaining small against baseline LSA activity. • Geographic extent: accrues across the nested LSA, RSA, and Ontario geographies; local share addressed under retention. • Duration: construction program plus the ~20-year operating life. • Likelihood and confidence: high; Statistics Canada input-output multipliers applied to Walker’s budgets.
Retention of economic benefits within local economy	<p>Low Positive.</p> <ul style="list-style-type: none"> • Magnitude: LSA captures ~\$149M of construction GDP and ~\$10.3M/yr of operating GDP (43.0–60.0% of Ontario capital effects; 65.8–82.7% of operating effects); household spending allocates ~\$115.5M (55.7%) to the LSA over the operating life. • Geographic extent: measured at the LSA and RSA; operating effects retained at higher rates than capital effects. • Duration: applies across the construction program and the operating life.

Indicator	Assessment
	<ul style="list-style-type: none"> Likelihood and confidence: moderate to high; procurement shares reflect Walker’s local-sourcing record; household-spending allocation assumes spending follows labour income geographically.

Under the future baseline, the procurement, employment, and household-spending effects of Phase 2 would not arise, although other campus operations would continue independently of the landfill.

The two residual effects on sensitive businesses are low and not significant. They are characterized below against the No / Low / Moderate / High framework.

Criterion	Royal Niagara Golf Club — dust (CR21)	Gauld Nurseries — odour (CR17)
Magnitude	Low. Dust peaks at 182 µg/m ³ against the 120 µg/m ³ criterion, on a baseline already at 155 (the adjacent Quarry).	Low. Odour above 3 OU rises from none at baseline to 0.48% of the time under Impact 2, then declines to 0.3% under Impact 3; a nuisance at an outdoor operation, not a viability constraint.
Duration	Short. Transitional, confined to the Impact 1 period.	Moderate. Persists through Impacts 2 and 3.
Frequency	Infrequent. Sixteen exceedance days over the five-year modelling period, during the transition.	Infrequent. 0.48% of the time under Impact 2 and 0.3% under Impact 3 (about 42 and 26 hours a year).
Reversibility	Reversible. Resolves once the Quarry is retired.	Reversible. Recedes from its Impact 2 peak through Impact 3.
Spatial extent	Small. One business, on the course about 1,146 m from the boundary.	Small. A single receptor, the nearest sensitive business (about 456 m).
Social / ecological impact	Few or minor. A recreational amenity; no threat to viability.	Few or minor. An outdoor commercial nuisance; no threat to productivity or viability.
Mitigation effectiveness	Not needed as an economics measure; dust control under the Air Quality discipline keeps the baseline largely unchanged.	The local plant-material sourcing measure described in Section 5.2 addresses the potential low adverse business effect.
Significance	Low — not significant.	Low — not significant.

5.1.2 Property Values

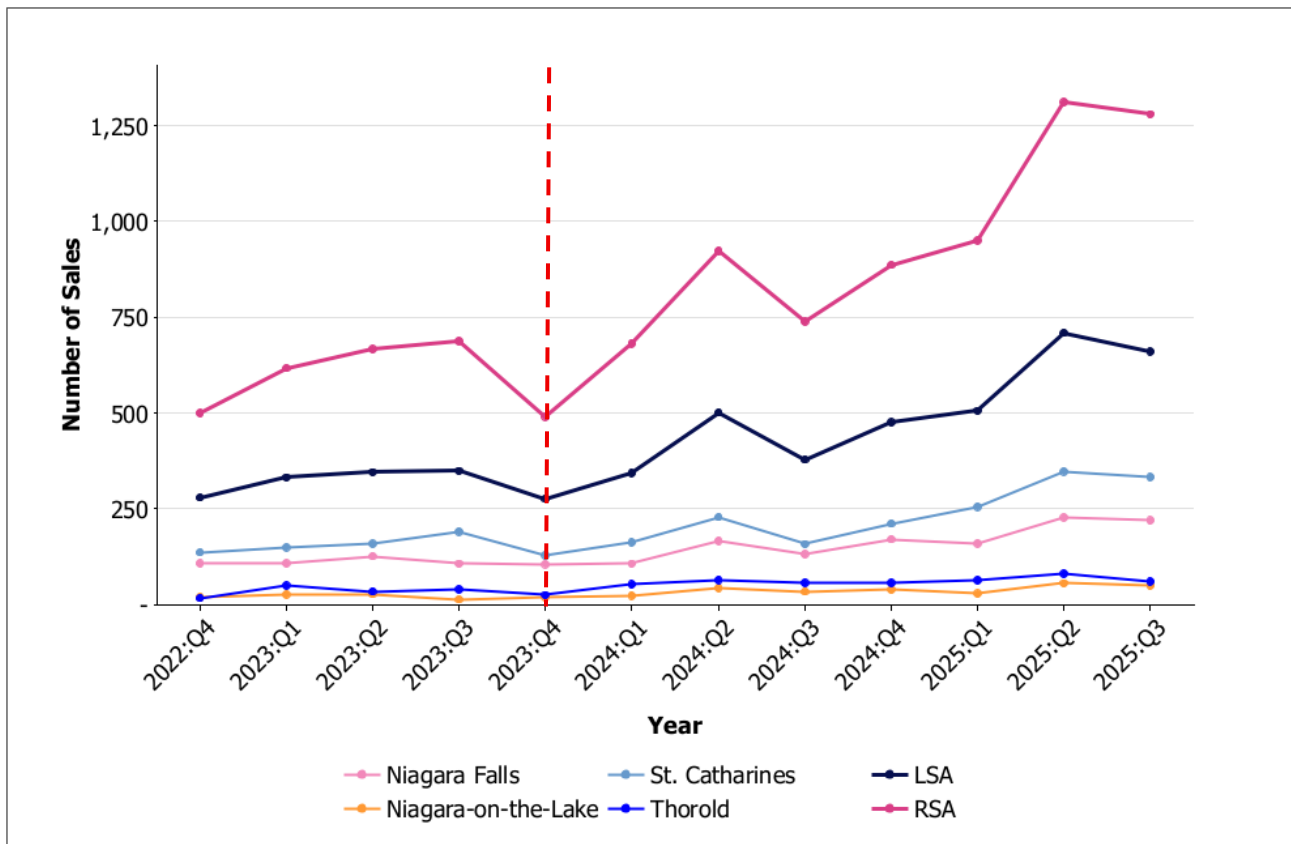
5.1.2.1 Real Estate Market

The baseline analysis established that LSA and RSA real estate markets moved in lockstep through a full interest rate-driven cycle from 2018 to 2025. This section tests whether that correlation broke down after the South Landfill Phase 2 announcement on November 30, 2023, using quarterly data to detect any divergence that annual figures might obscure.

5.1.2.2 Sales

Figure 3 presents quarterly detached home sales in the LSA and RSA from Q4 2022 to Q3 2025. In the four pre-announcement quarters (Q4 2022 through Q3 2023), the LSA averaged 53.0% of RSA sales, ranging from 50.7% to 55.9%. Q4 2023, the transition quarter straddling the November 30 announcement, showed the LSA at 56.3% of RSA sales (276 of 490 units), just above the pre-announcement ceiling of 55.9%. In the seven post-announcement quarters (Q1 2024 through Q3 2025), the LSA averaged 52.6% of RSA sales, ranging from 50.4% to 54.3%. The pre- and post-announcement averages differ by 0.4 percentage points (53.0% versus 52.6%). That difference is smaller than the quarter-to-quarter movement observed before the announcement, and the two ranges overlap almost entirely, indicating no shift in the LSA’s share of regional sales following the announcement.

Figure 3: LSA and RSA Detached Home Sales, Q4 2022-Q3 2025



Source: (Avaanz Ltd., 2026b) (Toronto Regional Real Estate Board, 2025)

In Q1 2024, the LSA sales-to-new-listings ratio (SNLR) was 37%, down from 45% in Q1 2023, while the RSA fell from 44% to 40% over the same period (Toronto Regional Real Estate Board, 2025). The LSA's 8-point decline exceeded the RSA's 4-point drop, though both moved in the same

direction. The divergence was short-lived: by Q2 2024, the second post-announcement quarter, both geographies converged into the 33–36% range, where they remained through Q3 2025.

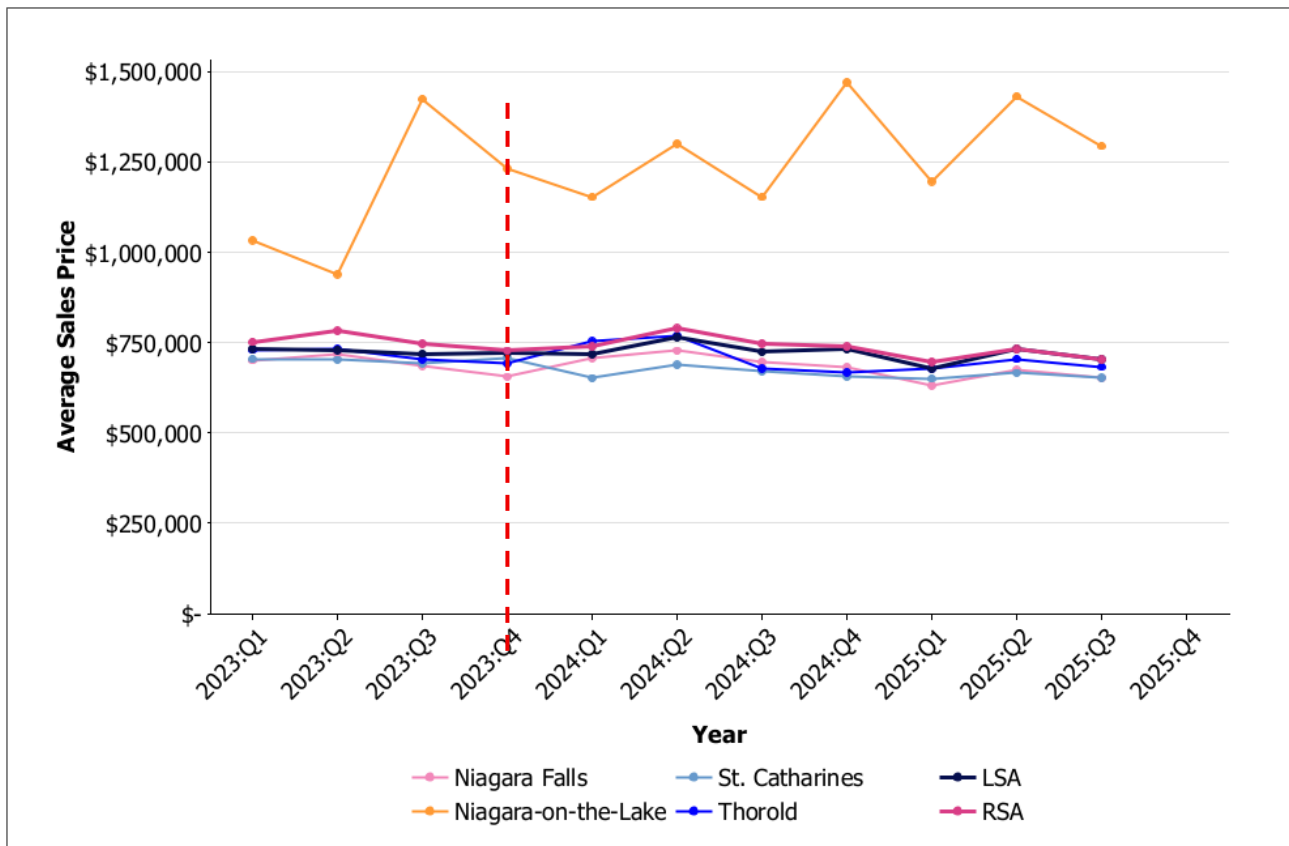
Market commentary provides a check on what was driving conditions in the post-announcement period. In December 2023, after the announcement, the Niagara Association of REALTORS® attributed market conditions to interest rate expectations: "With the Bank of Canada holding the interest rate at 5% and expectations are they could possibly reduce that rate this year, we should be prepared for a somewhat typical spring market" (Niagara Association of Realtors, 2024a). By October 2024, the Association's commentary reflected the shift to rate relief: "Buyers are gaining confidence in the market with the Bank of Canada announcement reducing the policy interest rate by .50%" and that "buyers are definitely coming off the sidelines," with sales increasing 43% year-over-year (Niagara Association of Realtors, 2024b). By November 2025, the Association described a price correction of approximately 33.7% from the March 2022 market peak, with rate stability supporting "more predictable market behaviour" (Niagara Association of Realtors, 2025).

Sales activity in the LSA showed no sustained departure from regional trends following the announcement.

5.1.2.3 Sales Price

Figure 4 presents quarterly average sale prices in the LSA and RSA from Q4 2022 to Q3 2025. Before the announcement, the LSA traded at an average discount of 4.6% below the RSA (range: 2.5% to 6.8%). After the announcement, the discount narrowed to an average of 1.9% (range: -0.1% to 3.2%). Both areas moved together. Prices rose in the spring quarters, softened through the second half of the year, and declined through early 2025 before partially recovering. By Q3 2025, LSA and RSA average prices converged to \$702,000.

Figure 4: LSA Detached Average Sales Price, Q4 2022-Q3 2025



Source: (Avaanz Ltd., 2026b) (Toronto Regional Real Estate Board, 2025)

Note: 2025 municipal figures are aggregated from TRREB neighbourhood-level data and exclude price-suppressed transactions.

Average sale prices showed no post-announcement divergence between the LSA and RSA: the price gap narrowed rather than widened, and no post-announcement quarter exceeded the pre-announcement maximum discount.

5.1.2.4 Property Value Analysis

Property sales in four LSA neighbourhoods were compared at the individual transaction level against control areas before and after the announcement: LSA Rural against Cooks Mills, Welland; Mount Carmel, Niagara Falls against Fonthill, Pelham; Niagara-on-the-Green, Niagara-on-the-Lake against Confederation Heights, Thorold; and Downtown Thorold and Merritton against Downtown Welland. The control areas are similar in character and subject to the same broad market forces but located further from the landfill site.

5.1.2.5 LSA Neighbourhoods

The rural residential area encompasses properties to the south, north, and east of the Walker Resource Management Campus within the 2-kilometre LSA, spanning the City of Niagara Falls, the Town of Niagara-on-the-Lake, and the City of Thorold. The sample comprises single-family rural residential properties on lots of five acres or less, located more than 100 metres from the urban fringe, and excludes transactions involving Walker-affiliated parties. A portion of the area falls within the City of Niagara Falls's Northwest Secondary Plan area, brought into the City's Urban Area Boundary in November 2022 through the Niagara Region Official Plan; the redesignated lands remain undeveloped and rural in character, and none of their few residential parcels transacted during the analysis period, so the 2022 change has no bearing on the sample.

Mount Carmel is an established residential neighbourhood in the City of Niagara Falls east of the Walker Resource Management Campus, composed primarily of single-family detached homes on larger suburban lots. The analysis sample is drawn from the relatively uniform interior residential portion of the neighbourhood 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.

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 phases from the late 1990s to 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. The closest portion of the subdivision lies 1,984 metres north of the proposed Phase 2 boundary, within the 2-kilometre LSA around the Walker Resource Management Campus.

Downtown Thorold and Merriton St. Catharines comprise the established urban residential area within the 2-kilometre radius of the Walker Resource Management Campus, immediately west of the Welland Canal. The housing stock is mixed in age and form, spanning late 19th-century to recent construction across detached, semi-detached, townhouse, and multi-unit dwellings.

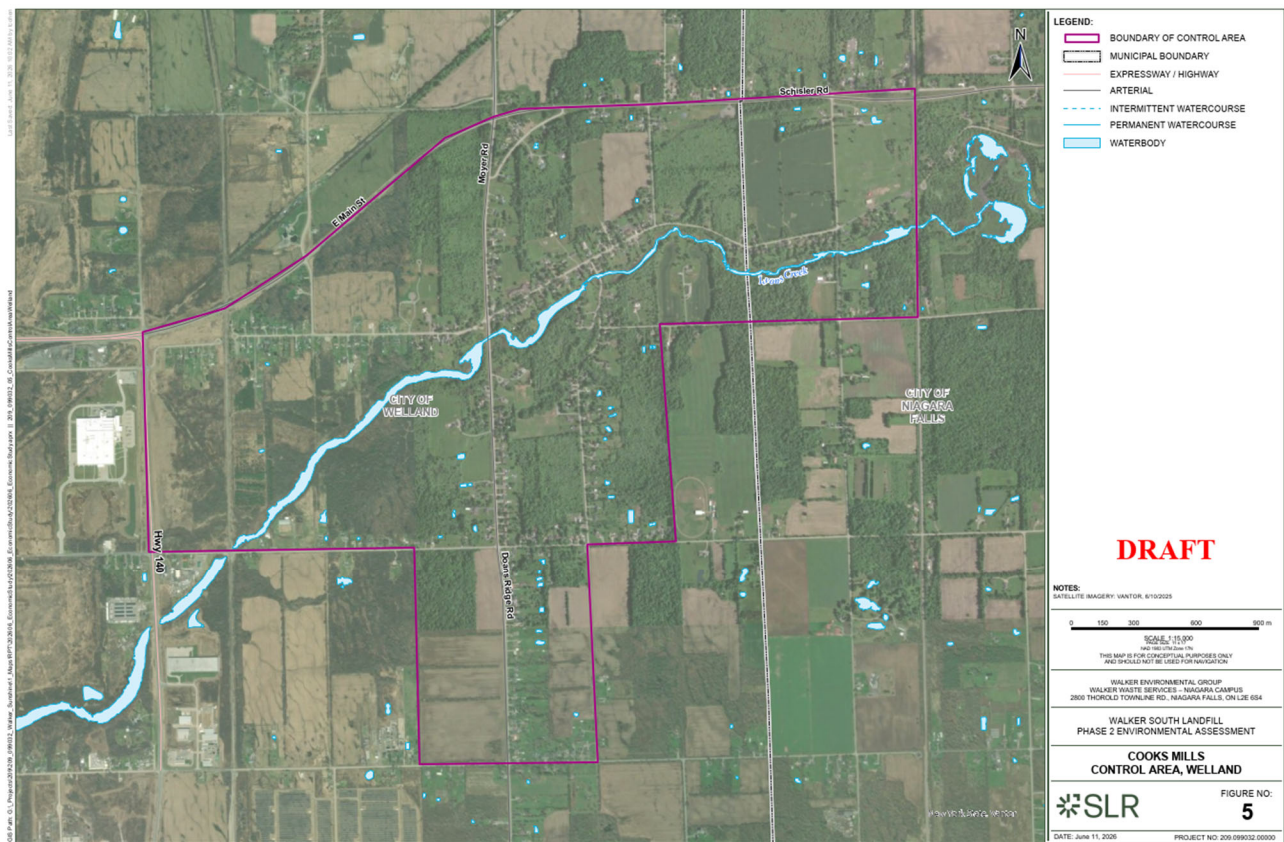
5.1.2.6 Control Areas

5.1.2.6.1 Cooks Mills, Welland

Cooks Mills is a semi-rural area in the City of Welland, east of the Welland Canal along the north bank of Lyon’s Creek (Parks Canada, 2007). Housing consists of homes on large lots fronting rural roads, in a mix of ages and styles, surrounded by agricultural and conservation land (Google Earth, 2025). Located approximately 13 km south of the Walker Resource Management Campus, the area corresponds in character to the LSA rural residential sample.

Figure 5 presents a map of Cooks Mills Area from which sales data was collected.

Figure 5: Cooks Mills Control Area, Welland

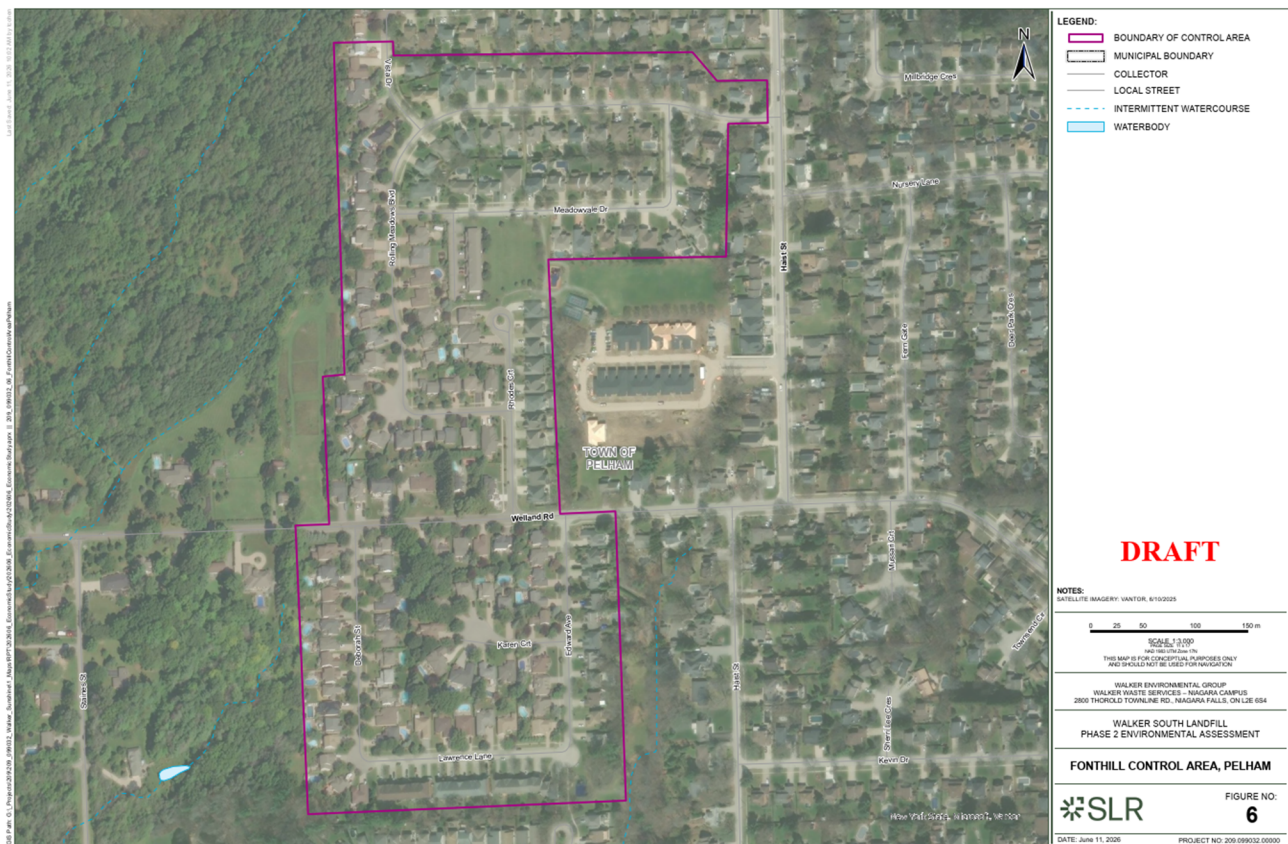


5.1.2.6.2 Fonthill, Pelham

Fonthill is a residential community in the Town of Pelham. The area selected for analysis, in southwest Fonthill near the intersection of Haist Street and Welland Road, comprises detached homes with development beginning in the 1990s (Google Earth, 2025). Located approximately 14 km from the Walker Resource Management Campus, the area is comparable in character to Mount Carmel; both are established neighbourhoods of single-family detached homes on suburban lots.

Figure 6 presents a map of the Fonthill area from which sales data was collected.

Figure 6: Fonthill Control Area, Pelham



5.1.2.6.3 Confederation Heights, Thorold

Confederation Heights is a residential subdivision in the City of Thorold. The area examined is the western portion of the subdivision, bounded by Highway 406 to the west and Richmond Street to the east, comprising two-storey detached homes with development beginning in the early 2000s (Google Earth, 2025). Located over 4 km from the Walker Resource Management Campus, it is comparable in character to Niagara-on-the-Green; both are suburban subdivisions developed over the same period.

Figure 7 presents a map of the Confederation Heights neighbourhood from which sales data was collected.

Figure 7: Confederation Heights Control Area, Thorold

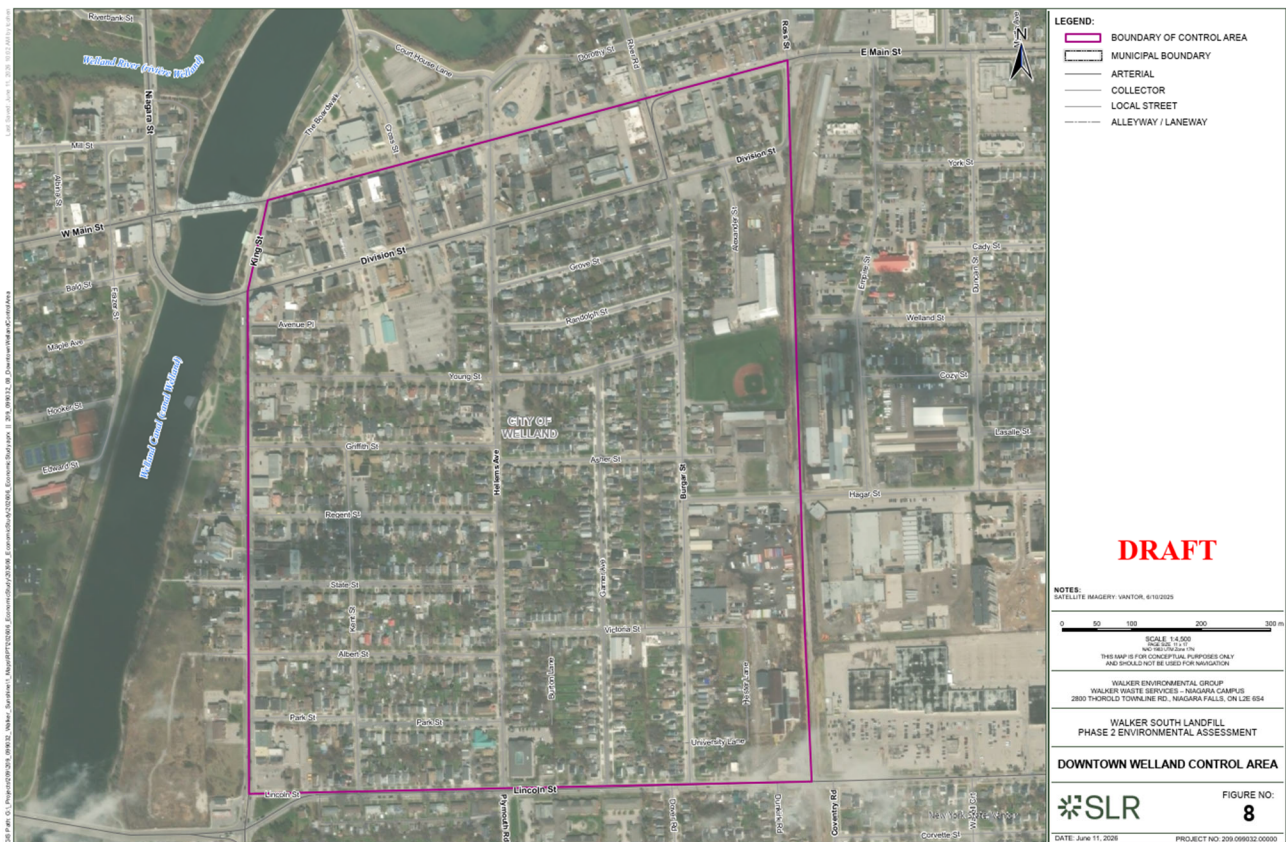


5.1.2.6.4 Downtown, Welland

Downtown Welland is an established urban residential neighbourhood in North Welland adjacent to the Welland Canal. The housing stock consists predominantly of single detached homes on a traditional street grid, with most buildings dating to before 1960 (Google Earth, 2025). Located approximately 12 km south of the Walker Resource Management Campus, Downtown Welland is comparable to the Downtown Thorold and Merrittton study area; both are established urban neighbourhoods with older housing stock, gridded streets, and locations adjacent to the Welland Canal.

Figure 8 presents a map of downtown Welland area from which sales data was collected.

Figure 8: Downtown Welland Control Area



5.1.2.7 LSA Rural Residential vs Cooks Mills

Properties exceeding 5 acres were excluded to ensure the analysis captures residential rather than agricultural valuations, as price-per-square-foot metrics behave non-linearly above this threshold. Properties classified by Geowarehouse as "farm" or "other residential" were reviewed using aerial imagery, Google Maps Street View, and web search, and those confirmed to contain a single-family residential dwelling were retained. Properties within 100 metres of the urban fringe were excluded to avoid contaminating the rural comparison with urban-proximate pricing. Transactions where Walker was the purchasing party were excluded. To test for a distance-decay effect, the analysis was conducted across three distance bands: within 1,000 metres, between 1,000 and 2,000 metres, and all properties within 2,000 metres of the Walker campus.

5.1.2.7.1 Within 1,000 Metres of the Proposed Site

The 1,000-metre band examined 65 sales: 25 LSA rural residential and 40 Cooks Mills, of which 55 occurred before the announcement and 10 after (2 LSA rural residential, 8 Cooks Mills). Sale timing differed between the two areas. Lot sizes were comparable, with LSA rural residential averaging 1.41 acres against 1.13 in Cooks Mills.

Before the announcement, a time-adjusted comparison found no significant per-square-foot difference between the two areas (+\$1.15/sqft). After the announcement, no significant difference was detected (-\$0.65/sqft), though with only 2 post-announcement LSA rural residential sales this estimate warrants caution. Using all 65 sales, the DID test produced an interaction coefficient of -\$1.51/sqft, which is not statistically significant.

Table 21: LSA Rural Residential (Within 1,000m) vs Cooks Mills Analysis Results

Period	N	Method	Result	p-value	Significant?
Pre-Ann.	55	Time-Adj \$/sqft	Control: +\$1.15/sqft	0.538	No
Post-Ann.	10	Time-Adj \$/sqft	Control: -\$0.65/sqft	0.967	No
Full Period	65	Diff-in-Diff (DID)	Control×Post: -\$1.51/sqft	0.826	No *

Note: * The DID test measures whether the pricing relationship between the two areas shifted after the announcement. A non-significant interaction ($p > 0.05$) means the test did not detect a shift.

5.1.2.7.2 Between 1,000 and 2,000 Metres of the Proposed Site

The 1,000 to 2,000-metre band examined 63 sales: 23 LSA rural residential and 40 Cooks Mills, of which 53 occurred before the announcement and 10 after (2 LSA rural residential, 8 Cooks Mills). Sale timing was comparable. Lot sizes differed significantly, with LSA rural residential averaging 2.00 acres against 1.13 in Cooks Mills.

Before the announcement, a time-adjusted comparison found no significant per-square-foot difference between the two areas (+\$2.00/sqft). After the announcement, no significant difference was detected (+\$18.08/sqft); the positive coefficient indicates the 2 post-announcement LSA rural residential sales transacted at lower per-square-foot prices relative to Cooks Mills, though the small

sample limits generalizability. Using all 63 sales, the DID test produced an interaction coefficient of +\$16.15/sqft, which is not statistically significant at the 0.05 level ($p = 0.068$). No statistically significant change in the pricing relationship was detected, though the result lies close to the threshold and only 2 post-announcement study sales contribute to the estimate.

Table 22: LSA Rural Residential (1,000–2,000m) vs Cooks Mills Analysis Results

Period	N	Method	Result	p-value	Significant?
Pre-Ann.	53	Time-Adj \$/sqft	Control: +\$2.00/sqft	0.481	No
Post-Ann.	10	Time-Adj \$/sqft	Control: +\$18.08/sqft	0.237	No
Full Period	63	Diff-in-Diff (DID)	Control×Post: +\$16.15/sqft	0.068	No *

Note: * Non-significant interaction ($p > 0.05$).

5.1.2.7.3 All LSA Rural Residential (Within 2,000 Metres of Walker Campus)

Combining all rural residential properties within 2,000 metres of the Walker Resource Management Campus produced the largest sample, 96 sales: 56 LSA rural residential and 40 Cooks Mills, of which 83 occurred before the announcement and 13 after (5 LSA rural residential, 8 Cooks Mills). Sale timing differed between the two areas. Lot sizes also differed, with LSA rural residential averaging 1.58 acres against 1.13 in Cooks Mills. This band provides 5 post-announcement study-area sales compared to 2 in each narrower band.

Before the announcement, a time-adjusted comparison found no significant per-square-foot difference between the two areas (+\$2.80/sqft). After the announcement, no significant difference was detected (+\$3.75/sqft). Using all 96 sales, the DID test produced an interaction coefficient of +\$1.59/sqft, which is not statistically significant.

Table 23: All LSA Rural Residential vs Cooks Mills Analysis Results

Period	N	Method	Result	p-value	Significant?
Pre-Ann.	83	Time-Adj \$/sqft	Control: +\$2.80/sqft	0.187	No
Post-Ann.	13	Time-Adj \$/sqft	Control: +\$3.75/sqft	0.710	No
Full Period	96	Diff-in-Diff (DID)	Control×Post: +\$1.59/sqft	0.787	No *

Note * Non-significant interaction ($p > 0.05$).

5.1.2.8 Mount Carmel vs Fonthill

The Mount Carmel sample is drawn from the established single-detached residential subdivision within the boundaries of the LSA. The Fonthill comparator was drawn from the established single-detached residential subdivisions in the urban area of the Town of Pelham. Properties with frontage on the historical pre-subdivision concession roads bordering each sample were excluded symmetrically: Kalar Road for the Mount Carmel sample, and Welland Road and Haist Street for the Fonthill sample. Two specifications were tested: a primary analysis matching the comparator to

Mount Carmel's observed lot-size range (0.22–0.47 acres), and a sensitivity analysis expanding the comparator to a wider lot-size range (minimum 0.20 acres).

5.1.2.8.1 Mount Carmel Lot Range Match

The primary specification restricted Fonthill sales to the observed Mount Carmel lot-size range (0.22–0.47 acres / 9,591–20,451 sqft). After filtering, the analysis examined 103 sales: 73 Mount Carmel and 30 Fonthill, of which 97 occurred before the announcement and 6 after (4 Mount Carmel, 2 Fonthill). Both sale timing ($p = 0.58$) and lot sizes ($p = 0.22$) were comparable between the two areas. A parallel-trends diagnostic found no significant divergence in pre-announcement price trends between the two sub-markets (Days \times Control interaction, $p = 0.67$), supporting the identifying assumption of the DID test.

Before the announcement, a time-adjusted comparison found no significant per-square-foot difference between the two areas ($-\$6.74/\text{sqft}$). After the announcement, no significant difference was detected ($+\$10.28/\text{sqft}$), though the very small post-announcement sample ($n = 6$) warrants caution. Using all 103 sales, the DID test produced an interaction coefficient of $+\$25.51/\text{sqft}$, which is not statistically significant.

Table 24: Mount Carmel vs Fonthill Analysis Results — Mount Carmel Lot Range Match

Period	N	Method	Result	p-value	Significant?
Pre-Ann.	97	Time-Adj \$/sqft	Control: $-\$6.74/\text{sqft}$	0.191	No
Post-Ann.	6	Time-Adj \$/sqft	Control: $+\$10.28/\text{sqft}$	0.379	No
Full Period	103	Diff-in-Diff (DID)	Control \times Post: $+\$25.51/\text{sqft}$	0.213	No *

Note: * Non-significant interaction ($p > 0.05$).

5.1.2.8.2 Expanded Lot-Size Range

The sensitivity specification expanded the Fonthill comparator to a wider lot-size range, with a minimum lot area of 0.20 acres (8,712 sqft), capturing the established single-detached residential housing stock at and above that size. After filtering, the analysis examined 137 sales: 73 Mount Carmel and 64 Fonthill, of which 129 occurred before the announcement and 8 after (4 Mount Carmel, 4 Fonthill). Sale timing was comparable ($p = 0.84$). Mean lot sizes differed (Mount Carmel 0.30 acres against Fonthill 0.24 acres), reflecting Mount Carmel's position at the upper end of the lot-size distribution. The parallel-trends assumption held in this specification as well ($p = 0.46$).

Before the announcement, a time-adjusted comparison found no significant per-square-foot difference between the two areas ($-\$0.05/\text{sqft}$); the baseline gap is effectively zero. After the announcement, no significant difference was detected ($+\$2.17/\text{sqft}$); the larger post-announcement sample ($n = 8$) provides modestly improved statistical power compared to the primary specification. Using all 137 sales, the DID test produced an interaction coefficient of $+\$10.42/\text{sqft}$, which is not statistically significant.

Table 25: Mount Carmel vs Fonthill Analysis Results — Expanded Lot-Size Range

Period	N	Method	Result	p-value	Significant?
Pre-Ann.	129	Time-Adj \$/sqft	Control: -\$0.05/sqft	0.990	No
Post-Ann.	8	Time-Adj \$/sqft	Control: +\$2.17/sqft	0.820	No
Full Period	137	Diff-in-Diff (DID)	Control×Post: +\$10.42/sqft	0.494	No *

Note: * Non-significant interaction ($p > 0.05$).

Both specifications produced the same headline finding. No statistically significant DID interaction was detected, meaning no detectable change in the Mount Carmel–Fonthill pricing relationship after the announcement. The estimates differ slightly in magnitude because the expanded sample picks up Fonthill subdivisions with lot sizes just below the Mount Carmel minimum (Rolling Meadows Boulevard, Edward Avenue, Meadowvale Drive) that price more closely to Mount Carmel, while the tighter primary specification captures only the larger-lot Fonthill subset that prices somewhat differently. The non-significant result does not depend on the choice of lot-size threshold.

5.1.2.9 Niagara-on-the-Green vs Confederation Heights

Confederation Heights sales were filtered to the Niagara-on-the-Green lot size range (0.054–0.202 acres); 2 Confederation Heights sales outside this range were excluded. After filtering, the analysis examined 516 sales: 209 Niagara-on-the-Green and 307 Confederation Heights, of which 484 occurred before the announcement and 32 after (12 Niagara-on-the-Green, 20 Confederation Heights). Sale timing was comparable between the two areas, as were lot sizes, with both areas averaging 0.11 acres.

Before the announcement, a time-adjusted comparison found no significant per-square-foot difference between the two areas (–\$4.40/sqft). After the announcement, no significant difference was detected (–\$4.17/sqft); the post-announcement sample ($n = 32$) is the largest of the four neighbourhood comparisons. Using all 516 sales, the DID test produced an interaction coefficient of –\$10.08/sqft, which is not statistically significant.

Table 26: Niagara-on-the-Green vs Confederation Heights Analysis Results

Period	N	Method	Result	p-value	Significant?
Pre-Ann.	484	Time-Adj \$/sqft	Control: –\$4.40/sqft	0.090	No
Post-Ann.	32	Time-Adj \$/sqft	Control: –\$4.17/sqft	0.787	No
Full Period	516	Diff-in-Diff (DID)	Control×Post: –\$10.08/sqft	0.355	No *

Note: * Non-significant interaction ($p > 0.05$).

5.1.2.10 Downtown Thorold and Merritton St. Catharines vs Downtown Welland

Downtown Welland sales were filtered to the Downtown Thorold and Merritton lot size range (0.033–0.866 acres); 9 Downtown Welland sales falling below the lower bound were excluded. After filtering, the analysis examined 1,113 sales: 551 Downtown Thorold and Merritton and 562

Downtown Welland, of which 1,018 occurred before the announcement and 95 after (51 Downtown Thorold and Merritton, 44 Downtown Welland). Sale timing was comparable between the two areas, though lot sizes differed significantly, with Downtown Thorold and Merritton averaging 0.136 acres and Downtown Welland averaging 0.103 acres.

Before the announcement, a time-adjusted comparison found no significant per-square-foot difference between the two areas ($-\$2.72/\text{sqft}$). After the announcement, the control coefficient was positive but not statistically significant ($+\$13.55/\text{sqft}$). Using all 1,113 sales, the DID test produced an interaction coefficient of $+\$15.11/\text{sqft}$, which is statistically significant. Because this initial result was significant, four follow-up tests were conducted to determine whether it captures an announcement effect or a pre-existing market trend.

Table 27: Downtown Thorold and Merritton vs Downtown Welland Analysis Results

Period	N	Method	Result	p-value	Significant?
Pre-Ann.	1,018	Time-Adj $\$/\text{sqft}$	Control: $-\$2.72/\text{sqft}$	0.086	No
Post-Ann.	95	Time-Adj $\$/\text{sqft}$	Control: $+\$13.55/\text{sqft}$	0.058	No
Full Period	1,113	Diff-in-Diff (DID)	Control \times Post: $+\$15.11/\text{sqft}$	0.007	Yes **

Note: ** The DID interaction is statistically significant. Follow-up trend analysis, placebo testing, multi-window restricted DID, and within-area structural break testing were conducted to determine whether this reflects an announcement effect or a pre-existing divergence.

5.1.2.10.1 Trend Analysis

Annual mean price-per-square-foot values were computed for each area across the full study period (2009–2025). From 2009 to 2016, the two areas tracked closely: Downtown Thorold and Merritton averaged roughly $\$8/\text{sqft}$ above Downtown Welland, and this gap was stable with no statistically significant internal breaks. Beginning around 2017, the annual means diverged: Downtown Welland's price per square foot began appreciating faster than Downtown Thorold and Merritton's, and by 2018–2019 the historical relationship had fully reversed, with Downtown Welland priced higher on a per-square-foot basis. Structural break tests found statistically significant split-year indicators at 2017 and 2018, placing the onset of the divergence well before the November 2023 announcement.

5.1.2.10.2 Placebo DID Tests

When fictitious announcement dates were set at November 30 of each year from 2014 through 2021, mirroring the calendar date of the actual announcement, each produced a statistically significant interaction term. Significant results at each of these dates indicate a continuous structural shift in relative pricing rather than a response to any single event, including the November 2023 announcement.

5.1.2.10.3 Multi-Window Restricted DID

The trend analysis showed that the pricing relationship between Downtown Thorold and Merritton and Downtown Welland began shifting around 2017, well before the November 2023 announcement. To test whether the original significant DID result was capturing this pre-existing

post-2017 shift rather than a response to the announcement, the analysis was repeated using progressively shorter pre-periods: only sales from January 2017 onward, then 2018, then 2019, 2020, and 2021. Each successive window removes more of the early-period data from the comparison. The post-period (sales after November 30, 2023) was held constant. The lot-size range was also recomputed for each window so that the Downtown Welland filter always matched Downtown Thorold and Merritton's actual lot range within that window.

If the announcement had caused a change in the pricing relationship, the DID result should remain significant, or grow stronger, as the analysis focuses on more recent data closer to the announcement. Instead, the estimated effect shrinks toward zero as the pre-period window narrows and is not statistically significant in any of the five tests. The January 2021 window, which compares only the most recent stable pricing period to the post-announcement period and best satisfies the methodological requirements of the DID test, produces a result close to zero.

Table 28: Multi-Window Restricted DID — Downtown Thorold and Merritton St. Catharines vs Downtown Welland

Pre-Ann. period start	N	Method	Result	p-value	Significant?
Jan 2017	592	Diff-in-Diff (DID)	Control×Post: +\$6.99/sqft	0.316	No
Jan 2018	503	Diff-in-Diff (DID)	Control×Post: +\$3.64/sqft	0.616	No
Jan 2019	440	Diff-in-Diff (DID)	Control×Post: +\$1.84/sqft	0.810	No
Jan 2020	369	Diff-in-Diff (DID)	Control×Post: +\$0.34/sqft	0.967	No
Jan 2021	304	Diff-in-Diff (DID)	Control×Post: -\$2.53/sqft	0.769	No †
Full Period	1,113	Diff-in-Diff (DID)	Control×Post: +\$15.11/sqft	0.007	Yes **

Note: ** Original full-period result for reference.

† The Jan 2021 specification satisfies the parallel-trends assumption, which requires that the two areas' prices move in parallel during the pre-period. This is the cleanest of the five tests.

5.1.2.10.4 Within-Area Structural Break Test (Downtown Thorold and Merritton Only)

The final test set aside Downtown Welland and examined whether Downtown Thorold and Merritton's prices showed a sudden jump or drop after the announcement date. Because no comparator is used, this test is unaffected by any pricing differences between the two areas.

The test was applied across the same five pre-period windows as the restricted DID. The two most recent windows (starting January 2020 and 2021), which best capture the recent stable period, found no sudden change in Downtown Thorold and Merritton prices after the announcement ($p = 0.249$ and 0.875 , both well above the 0.05 significance threshold).

The three earlier windows (2017 through 2019) did detect a statistically significant change, but in every case Downtown Thorold and Merritton prices rose after the announcement. An adverse effect would imply a downward shift; the detected changes run in the opposite direction.

5.1.2.11 Summary of Findings

Four control-area comparisons, spanning 1,828 residential sales from January 2009 to February 2026, were conducted: LSA rural residential against Cooks Mills, tested across three distance bands; Mount Carmel against Fonhill, tested under two lot-size specifications; Niagara-on-the-Green against Confederation Heights; and Downtown Thorold and Merritton against Downtown Welland. The multiple bands and specifications test whether the findings depend on the choice of distance band or lot-size threshold.

The first three comparisons returned no statistically significant DID interaction in any band or specification (**Table 21** through **Table 26**). The one estimate that approached significance, in the rural residential band between 1,000 and 2,000 metres of the proposed site (+\$16.15/sqft, $p = 0.068$), rests on two post-announcement study-area sales and is not reproduced in either the band within 1,000 metres or the combined band, where coefficients are near zero.

The fourth comparison, Downtown Thorold and Merritton against Downtown Welland, produced a statistically significant full-period interaction (+\$15.11/sqft, $p = 0.007$), which follow-up testing attributes to a divergence that predates the announcement: the trend, placebo, multi-window, and structural break tests place its onset around 2017, roughly six years before the announcement, and the estimated effect shrinks to near zero and loses significance when the comparison is restricted to the period closest to the announcement.

Across all four comparisons, the analysis found no evidence that the announcement affected residential property values in the study areas; the post-announcement samples in the rural bands are small, as noted in the limitations.

5.1.2.12 Real Estate Professionals Interviews

The two participating real estate professionals offered divergent assessments of existing Walker operations on the local real estate market. One, whose practice covers agricultural and rural residential properties in the north end of the study area, reported no discernible effect: Walker has been "a mainstay for a long time" and local buyers and sellers are not surprised by its presence. The second, operating across the full Niagara Region, reported that odour from the existing facility is noticeable in the Phase 1 area, primarily on hot summer days depending on wind direction and temperature, though also detectable in winter months, and that these effects are concentrated between Montrose Road and the Thorold Tunnel on the south side of the facility.

With respect to the proposed Phase 2 expansion, the two real estate professionals again diverged. The first reported no concerns among buyers, sellers, or developers and stated that the proposal has had "zero" effect on supply, demand, pricing, days on market, or property values in their service area. This professional observed that the tenor of any complaints would likely reflect the amount of inventory on the market rather than the landfill itself, noting that in a low-inventory environment buyers will purchase near a landfill without hesitation, whereas elevated inventory is where concerns become apparent. The second reported that concerns exist, concentrated primarily in the area between Montrose Road and the Thorold Tunnel, and that there is a general

assumption among market participants that the expansion will create additional concerns for buyers and sellers in those neighbourhoods.

When asked to anticipate effects if Phase 2 proceeds, the first real estate professional suggested that any impact would be short-term and temporary, noting that some buyers may steer away from the area or widen the geographic scope of their search if inventory levels remain elevated. The second considered it "too early to tell until it becomes a reality" but stated that pricing and desirability would be affected, comparing two otherwise equal homes and concluding that the property experiencing odour would "fetch much, much less dollar" than a comparable home five kilometres away.

The two sets of interview responses address different dimensions of the assessment and reflect different geographic exposures. The first professional, operating in the north end of the study area, reported no observable market impact from either existing operations or the Phase 2 proposal and attributed any future complaints to broader market conditions rather than the facility. The second professional reported odour from existing operations in the Phase 1 area, anticipated that pricing and desirability would be affected for properties in proximity to the facility if Phase 2 proceeds, and considered it too early to identify a measurable effect on current market activity. The quantitative analysis in the preceding section found no statistically significant negative announcement effect across the four neighbourhood comparisons tested; the practitioner observations provide qualitative context for how market participants at different distances from the facility perceive and may respond to the project.

5.1.2.13 Potential for Property Value Effects During Operations

Property value effects can arise where a facility changes the nuisance conditions at nearby homes (odour, dust, noise, traffic, and views) or changes how the market sees an area. To find where that potential exists, the predictions from each discipline study were assessed at every residential receptor against two questions: whether a predicted value exceeds the criterion set by that discipline, and, where a criterion is already exceeded at baseline, whether the project makes conditions worse. The residential receptors meeting either of these tests are compiled in **Table 29**. Each result was then sorted by how long it lasts, separating effects confined to the transitional Impact 1 period (when the closing Phase 1 landfill, the Quarry, and the Phase 2 Stage 1 operate together) from those continuing through Impacts 2 and/or 3 (Impact 2 spanning Phase 2 filling from Stage 2 to the end of Stage 3, after the Quarry is retired, and Impact 3 the final operating period to the end of Stage 4), and by ownership, since conditions at Walker-owned properties do not bear on third-party values. For odour, the MECP guidance applied in the Air Quality assessment treats odour above the 1 OU detection threshold as acceptable below 0.5% of the time. A receptor is therefore listed in the table where odour exceeds 1 OU for 0.5% or more of the time (about 44 hours a year), or where the project worsens odour at a receptor already above that level. Odour above 3 OU is not a criterion however this is the recognition threshold and the lower end of the 3 to 5 OU complaint range. Each receptor listed in the table therefore also records the frequency at which odour exceeds 3 OU. The strongest ten-minute reading is shown as a measure of peak

intensity. **Table 29** lists every residential receptor with at least one predicted air-quality or noise exceedance or worsened condition, ordered by distance from the site boundary.

Most receptors with an odour entry already exceeded the criterion before the project. Of the 15 privately held residential receptors in **Table 29**, 10 already exceeded the 1 OU criterion under existing conditions, at 0.6% to 1.5% of the time (about 53 to 131 hours a year); a further 2 sat exactly at it; and only 3, all beyond 1,100 m, cross it for the first time. Every receptor within about 600 m of the site boundary is in the first group, so near the site the project adds to odour residents already experience rather than creating a new exposure. The new crossings are minor and distant: at R28 (1,585 m), for example, the odour rises from 0.4% to 0.7% of the time (about 35 to 61 hours a year) under Impact 1 and returns to baseline by Impact 3.

Odour above the 3 OU recognition threshold is a different matter, because near the site it is absent today and introduced by the project. At the five receptors within about 600 m (R04, R02/CR17, R06, R18/CR04 and R05) and at R07 (722 m), the strongest ten-minute odour today sits just below 3 OU (2.5 to 2.7 OU); under the project it rises above the 3 OU threshold, peaking between 3.8 and 5.5 OU, and the time spent above 3 OU rises from none to between 0.3% and 0.7% (about 26 to 61 hours a year). This above-threshold odour is infrequent and, except at one location, limited to the transitional Impact 1 period. The nearest residence, R02/CR17 (457 m), is the most affected and the only receptor where it continues past Impact 1: its peak reaches 5.5 OU and its time above 3 OU reaches 0.48% (about 42 hours a year) under Impact 2, easing to 0.3% (about 26 hours a year) under Impact 3.

Dust and noise are more limited still. The 24-hour dust criterion of 120 µg/m³ is exceeded at only two receptors, and only under Impact 1: one day at the nearest residence, R02/CR17, and two days at a Walker-owned property, both clearing after the transitional period. No privately held residence has a noise exceedance. These figures describe possible exposure at residential locations, not observed or predicted changes in the market.

Table 29: Predicted Criterion Exceedances and Worsened Above-Criteria Conditions at Residential Receptors by Distance from the Proposed Waste Disposal Site Boundary

Receptor	Distance (m) boundary (fill)	Tenure	Odour baseline → impact	TSP & noise	Worsening criterion exceedances and recognition indicators (by impact period)
NR29	114 (144)	Walker, vacant	—	Cont. day: 50 → 57 (Impact 1) Cont. night: 38 → 47 (Impact 2) Banger: 64 → 71 (Impact 2)	Continuous noise Impacts 1–2 Impulsive noise (banger) Impact 2
NR23	347 (381)	Vacant, no dwelling	—	Banger: 70 → 73 (Impact 2); 76 (Impact 3)	Impulsive noise (banger) Impacts 2–3
R10 CR05	450 (758)	Third-party dwelling	Freq. >1 OU: 1.2 → 1.4% (Impact 1) max 10-min OU: 4.0 → 4.0 (Impact 1)	—	Freq. >1 OU Impact 1
R04	456 (486)	Third-party dwelling	Freq. >1 OU: 1.5 → 3.1% (Impact 1); 2.4% (Impact 2); 2.1% (Impact 3) >3 OU: 0.0 → 0.7% (Impact 1) max 10-min OU: 2.7 → 4.9 (Impact 1)	—	Freq. >1 OU Impacts 1–3 Freq. >3 OU (recognition indicator) Impact 1
R02 CR17	457 (492)	Third-party dwelling + nursery	Freq. >1 OU: 0.9 → 1.4% (Impact 1); 2.4% (Impact 2); 2.3% (Impact 3) Freq. >3 OU: 0.0 → 0.48% (Impact 2); 0.3% (Impact 3) max 10-min OU: 2.5 → 5.5 (Impact 2); 4.3 (Impact 3)	TSP 24-hr: 88 → 133.1 µg/m ³ (Impact 1) TSP days >120: 0 → 1 (Impact 1)	Freq. >1 OU Impacts 1–3 Freq. >3 OU (recognition indicator) Impacts 2–3 TSP exceedance Impact 1
R06	530 (560)	Third-party dwelling	Freq. >1 OU: 1.4 → 2.7% (Impact 1); 2.0% (Impact 2); 1.7% (Impact 3) Freq. >3 OU: 0.0 → 0.6% (Impact 1) max 10-min OU: 2.7 → 4.5 (Impact 1)	—	Freq. >1 OU Impacts 1–3 Freq. >3 OU (recognition indicator) Impact 1
R18 CR04	547 (577)	Third-party dwellings	Freq. >1 OU: 1.3 → 2.4% (Impact 1); 1.9% (Impact 2); 1.6% (Impact 3) Freq. >3 OU: 0.0 → 0.6% (Impact 1) max 10-min OU: 2.7 → 4.5 (Impact 1)	—	Freq. >1 OU Impacts 1–3 Freq. >3 OU (recognition indicator) Impact 1
R05	551 (581)	Third-party dwelling	Freq. >1 OU: 1.3 → 2.6% (Impact 1); 2.0% (Impact 2); 1.7% (Impact 3) Freq. >3 OU: 0.0 → 0.5% (Impact 1) max 10-min OU: 2.6 → 4.5 (Impact 1)	—	Freq. >1 OU Impacts 1–3 Freq. >3 OU (recognition indicator) Impact 1
R07	722 (752)	Third-party dwelling	Freq. >1 OU: 1.1 → 1.9% (Impact 1); 1.3% (Impact 2) Freq. >3 OU: 0.0 → 0.3% (Impact 1) max 10-min OU: 2.5 → 3.8 (Impact 1)	—	Freq. >1 OU Impacts 1–2 Freq. >3 OU (recognition indicator) Impact 1
R08	947 (986)	Third-party dwelling	Freq. >1 OU: 0.8 → 1.1% (Impact 1) max 10-min OU: 2.3 → 3.3 (Impact 1)	—	Freq. >1 OU Impact 1

Receptor	Distance (m) boundary (fill)	Tenure	Odour baseline → impact	TSP & noise	Worsening criterion exceedances and recognition indicators (by impact period)
R03 CR19	1,033 (1,149)	Walker-owned	max 10-min OU: 6.8 → 7.4 (Impact 1)	Shotgun: 68 → 72 (Impact 1); 71 (Impact 2); 72 (Impact 3)	Impulsive noise (shotgun) Impacts 1–3
R09 CR18	1,054 (1,127)	Third-party dwellings	Freq. >1 OU: 0.6 → 0.8% (Impact 1) max 10-min OU: 2.3 → 2.9 (Impact 1)	—	Freq. >1 OU Impact 1
NR28	1,057 (1,177)	Walker-owned	—	Shotgun: 70 → 73 (Impact 1); 72 (Impact 2); 73 (Impact 3)	Impulsive noise (shotgun) Impacts 1–3
R17 CR01	1,094 (1,127)	Third-party dwellings	Freq. >1 OU: 1.1 → 1.5% (Impact 1); 1.4% (Impact 2); 1.2% (Impact 3) max 10-min OU: 3.8 → 3.3 (Impact 1)	—	Freq. >1 OU Impacts 1–3
R01	1,152 (1,186)	Walker-owned	Freq. >1 OU: 1.3 → 1.7% (Impact 1) max 10-min OU: 4.4 → 4.7 (Impact 1)	TSP 24-hr: 106 → 123 µg/m ³ (Impact 1) TSP days >120: 0 → 2 (Impact 1)	Freq. >1 OU Impact 1 TSP exceedance Impact 1
R25 CR14	1,180 (1,210)	Future development area	Freq. >1 OU: 0.4 → 0.6% (Impact 1); 0.9% (Impact 2); 0.7% (Impact 3) max 10-min OU: 1.8 → 3.2 (Impact 1)	—	Freq. >1 OU Impacts 1–3
R14	1,451 (1,734)	Third-party dwelling	Freq. >1 OU: 0.5 → 0.6% (Impact 1)	—	Freq. >1 OU Impact 1
R28 CR20	1,585 (1,615)	Third-party dwellings	Freq. >1 OU: 0.4 → 0.7% (Impact 1); 0.6% (Impact 2) max 10-min OU: 1.7 → 2.7 (Impact 1)	—	Freq. >1 OU Impacts 1–2
R23 CR12	1,653 (1,695)	Third-party dwellings	Freq. >1 OU: 0.3 → 0.5% (Impact 2) max 10-min OU: 1.5 → 2.4 (Impact 2)	—	Freq. >1 OU Impact 2
R26 CR15	1,985 (2,016)	Third-party dwellings	Freq. >1 OU: 0.5 → 0.6% (Impact 1) max 10-min OU: 3.0 → 3.1 (Impact 1)	—	Freq. >1 OU Impact 1

Note: Receptor identifiers follow the discipline study numbering, with common receptor (CR) cross-references where assigned; distances are measured from receptor model points to the proposed Waste Disposal Site Boundary, with the distance to the limit of fill in brackets.

Three effects do not fade with distance and are handled on their own. Views of the landfill, where sightlines allow, are screened by the perimeter berms and by planting that fills in over time. Impulsive noise affects only Walker-owned homes and one vacant private lot, and is dealt with by relocating or replacing it, as the Noise study sets out. Walker's share of peak-hour truck traffic is assessed by the Transportation study against intersection capacity, not against a nuisance limit. None of these changes the distance pattern that points to the properties nearest the site.

Taken together, the announcement analysis and the operating record of the existing South Landfill point to no measurable effect on residential property values over the operating life of Phase 2. The market evidence is the basis: across four control-area comparisons, the announcement analysis found no evidence that values near the site moved, and the operating record shows the market has not valued homes near the existing landfill differently from comparable areas. The market has lived with these conditions throughout the years the Walker Campus has operated. The quieter future in which the project does not proceed, the landfill closes, and the Quarry is rehabilitated was never reflected in local prices, so continuing operations under the expansion does not take away value owners had paid for. The receptor work locates where potential is greatest; it does not establish that an effect exists. It points to a small set of homes nearest the site where predicted conditions change most and where there are too few recent sales to confirm the no-effect finding property by property. The one residential receptor where odour above the 3 OU recognition threshold persists is the nearest one to the northeast (R02/CR17, ~456 m), the same receptor location assessed as Gauld Nurseries under the business criterion, where the strongest ten-minute reading rises above today's level to a strength already found at other homes nearby. Any remaining potential is therefore specific to the individual properties closest to the site, and the project is not expected to have a significant adverse effect on real estate.

5.1.2.14 Summary of Potential Effects on Property Values

The effect on real estate is assessed through one ToR indicator: property value impacts. Across four control-area comparisons covering 1,828 residential sales, every distance band and specification tested, and the operating record of the existing South Landfill, the analysis found no evidence of an announcement effect on residential property values, and no measurable effect is anticipated during the operating life of Phase 2. The residual nuisance potential is bounded: it is specific to individual properties nearest the site, where predicted conditions depart from what the market has already priced and where the transaction record is too sparse to verify a no-effect conclusion at the individual-property scale.

Table 30 assesses the indicator against the four dimensions used to characterize effects: magnitude, geographic extent, duration, and likelihood and confidence. Magnitude is measured against the announcement analyses and the operating record; geographic extent and duration follow the screening of residential receptors against the nuisance criteria.

Table 30: Property Values Potential Effects by Indicator

Indicator	Assessment
Property value impacts	<p>No measurable effect; precautionary low adverse potential.</p> <ul style="list-style-type: none"> • Magnitude: no announcement effect detected; no measurable operational effect anticipated. <ul style="list-style-type: none"> – Market level: LSA share of RSA sales (53.0% pre-announcement, 52.6% post) and LSA price discount (4.6% pre, 1.9% post) show no sustained departure. – Neighbourhood level: 1,828 sales (2009–2026), time-adjusted price-per-square-foot DID; no significant interaction in three of four comparisons, in any band or specification. – The fourth (Downtown Thorold and Merritton, +\$15.11/sqft, p = 0.007) predates the announcement: the divergence began around 2017, placebo dates 2014–2021 are each significant, the estimate falls to -\$2.53/sqft (p = 0.769) in the cleanest window, and prices rose, not fell, after the announcement. – One band (1,000–2,000 m) approached significance (+\$16.15/sqft, p = 0.068) toward relatively lower study-area prices; it rests on two post-announcement study-area sales and is not reproduced in adjacent bands. • Geographic extent: residual nuisance potential confined to the properties nearest the site. <ul style="list-style-type: none"> – The project introduces odour above the 3 OU recognition threshold, absent under existing conditions, at the five receptors within about 600 m and at R07 (722 m); beyond R07 no receptor sees odour worsen above 3 OU, and more distant new departures are confined to the 1 OU detection tier. – Persistent departures at the 1 OU detection tier (odour exceeding the 1 OU criterion 0.5% or more of the time) are concentrated at the near-site receptors, which already exceed the criterion under existing conditions; departures between 600 m and 1,000 m are transitional. – Beyond 1,100 m the project does not worsen odour above 3 OU and causes no new dust or noise exceedance in any scenario; new departures are confined to the 1 OU detection tier. • Duration: concentrated in the transitional Impact 1 period. <ul style="list-style-type: none"> – R02/CR17 (the nearest residence to the northeast) is the only privately held dwelling where the worsening above 3 OU continues beyond the transitional Impact 1 period. – Worsened >1 OU odour frequencies (exceeding the 1 OU criterion 0.5% or more of the time) within about 600 m remain elevated across the operating life. – Visibility changes arise in the later stages where sightlines allow; the visual predictions incorporate the Garner Road berm extension. • Likelihood and confidence: moderate. <ul style="list-style-type: none"> – The comparisons, follow-up diagnostics, market tracking, and operating record point the same way.

Indicator	Assessment
	<ul style="list-style-type: none"> – The analysis measures the announcement, not operations, and the record is thinnest where exposure concentrates: ten sales within the 1,000 m band, two in the study area. – The price metric is per square foot of lot area without building attributes; lot-size composition differs in three of four comparisons; the two professionals interviewed diverged.

Under the future baseline, the LSA market carries persistent excess demand relative to supply; the project is not predicted to alter that outlook.

The market analysis found no measurable effect on residential property values, and none is anticipated during operations. A low adverse effect cannot be excluded at the homes nearest the site, where the project introduces odour above the 3 OU recognition threshold where none exists today and the transaction record is too sparse to confirm the no-effect finding property by property. The report carries this as a precautionary potential low adverse effect. A precautionary Property Value Protection Program (PVPP) is recommended for those properties; it is described under Proposed Mitigation and Compensation Measures (Section 5.2). With the PVPP in place, any such effect does not translate into a loss at the time of sale, and no significant net effect on real estate is anticipated.

The precautionary potential effect on real estate is characterized below against the No / Low / Moderate / High framework.

Criterion	Property value impacts (precautionary)
Magnitude	Negligible. No announcement effect detected and no measurable operational effect anticipated; the potential is precautionary, not measured.
Duration	Moderate. Tied to the operating period at the nearest homes; the odour driver eases over time.
Frequency	Infrequent. Driven by infrequent odour above the 3 OU threshold (about 0.3% to 0.7% of the time) at the near-site receptors.
Reversibility	Avoided. The PVPP protects against any value loss at the time of sale.
Spatial extent	Small. Confined to the individual properties nearest the site (within about 720 m).
Social / ecological impact	Few or minor. Bounded to a small set of homes; the market evidence shows no repricing.
Mitigation effectiveness	The precautionary PVPP keeps the baseline largely unchanged.
Significance	Low potential — not significant with the PVPP in place.

5.1.3 Cost of Services

This section assesses the cost effect of the future baseline scenario on waste disposal in the Niagara Region. If the South Landfill reaches its permitted capacity and closes without replacement, three customer segments currently served by the facility would be affected: IC&I generators, residential self-haul customers, and the Region of Niagara under its curbside collection

partnership agreement. Each segment faces different redirection costs depending on the available alternatives and the logistics of diverting their waste streams.

5.1.3.1 IC&I Customers

Walker's South Landfill is the sole private-sector IC&I disposal facility in the Niagara Region. The Region's own facilities at Humberstone Road and Niagara Road 12 are intended to provide residential waste capacity and do not provide IC&I disposal at commercially competitive rates. Under the Do Nothing scenario, IC&I generators would need to redirect waste to alternative landfills approved to receive waste from across Ontario. Because no transfer station currently operates at the Walker campus, redirected waste would first need to be consolidated at a transfer station before long-haul transport to an out-of-region facility.

The estimated incremental cost to Niagara IC&I generators is approximately \$28 per tonne.² This figure is volume-weighted across the five accessible alternative landfills: Twin Creeks (Warwick Township) and Ridge (Chatham-Kent) in southwestern Ontario, and Smith's Creek, Pine Tree Acres, and Carleton Farms in Michigan. The incremental cost reflects transfer-station consolidation, haulage to each alternative, bridge tolls on Michigan-bound routes, and tipping fees at the destination facilities. Both Twin Creeks and Ridge are operating at or near their permitted annual capacity limits and would have to displace existing volume to accept new tonnage from Niagara. Redirected Niagara IC&I waste would therefore most likely flow to the Michigan alternatives.

Applied to projected IC&I volumes, this incremental cost amounts to an aggregate annual cost to Niagara IC&I generators of approximately \$12.4 million in 2031, the first full operating year of the proposed landfill. The projection holds the current rate of approximately 2.06 tonnes per employee constant and applies it to projected 2031 Niagara Region employment of approximately 212,000 jobs, yielding approximately 436,500 tonnes of annual IC&I disposal demand.

5.1.3.2 Self-Haul

Residential self-haul customers currently deliver waste for disposal to Walker's drop-off depot in Thorold at a posted gate rate of \$130.55 per tonne including HST (Walker, 2026). The drop-off depot operates under a partnership agreement between Walker Environmental Group and the Region of Niagara, which covers residential self-hauled waste delivered to the depot (GHD, 2024a). Waste received at the depot is currently disposed of at the adjacent South Landfill.

Under the future baseline scenario, the South Landfill would close however, the drop-off depot would continue to operate independently of the landfill. Materials received at the depot would be transferred to an alternative disposal facility rather than being landfilled on site.

Because the drop-off location, gate rate, and service experience would remain unchanged from the customer's perspective, the closure of the South Landfill would have no material effect on self-haul

2. Aggregate figures are calculated using the unrounded increment of \$28.48 per tonne and may not reproduce exactly from the rounded values shown.

disposal access or cost. Customers would continue to use the same Thorold depot, and no additional travel time, fuel costs, or rerouting to alternative drop-off facilities would be required.

5.1.3.3 Region of Niagara

The Region of Niagara has a partnership agreement with Walker Environmental Group for the disposal of curbside-collected residential waste from St. Catharines, Thorold, Niagara-on-the-Lake, and specific collection routes and days in Niagara Falls (GHD, 2024a). The partnership agreement rate is commercially confidential. Under the future baseline scenario, the Region must redirect this waste to alternative disposal. Two options are available: external disposal or Humberstone Road Landfill.

5.1.3.4 External Disposal

If the Region were to redirect curbside waste to external facilities on a bulk contract basis, it would face the same redirection economics as IC&I generators. Consolidation at a transfer station before long-haul transport to an alternative landfill, plus haulage and applicable bridge tolls. Assuming the Region's confidential partnership rate is consistent with Walker's competitive bulk rate, the estimated incremental disposal cost is approximately \$28 per tonne, representing a direct increase to the Region's waste management budget.

Applied to projected curbside volumes of approximately 39,000 tonnes in 2031 (Walker's current curbside receipts held at a constant per-capita rate and grown with the projected population of the partnership municipalities), external redirection represents an aggregate annual cost to the Region of approximately \$1.1 million.

5.1.3.5 Humberstone Road Landfill

The Region could absorb the displaced volume at its own Humberstone Road Landfill in Welland. This avoids long-distance haulage but introduces two consequences. First, the Region's full cost recovery rate for disposal at its own facilities is \$181 per tonne (Niagara Region, 2024d), more than double the cost of external disposal including transfer-station consolidation, haulage, bridge tolls where applicable, and tipping fees at the alternative landfills. Second, absorption of this waste would accelerate the depletion of Humberstone's finite remaining airspace; based on current capture, this would represent an 83% increase in waste landfilled at Humberstone.

5.1.3.6 Summary of Customer Cost Effects

Taking the customer segments together, the Do Nothing scenario would impose aggregate incremental costs on Niagara customers of approximately \$13.5 million per year by 2031 to dispose of their waste out of region, comprising approximately \$12.4 million to IC&I generators and \$1.1 million to the Region's curbside program, with no material effect on self-haul customers. By maintaining local disposal capacity at competitive rates, the proposed South Landfill Phase 2 avoids these costs; the project therefore represents a beneficial effect on the customer cost of waste services, and no mitigation is required.

5.1.3.7 Summary of Potential Effects on the Cost of Services

The cost of services criterion is assessed through one ToR indicator: the impact on the customer cost of waste services. The effect is measured against the future baseline: South Landfill Phase 1 reaches its approved capacity by approximately 2030 (WSP Canada, 2026), and without Phase 2 the facility closes and its customers redirect their waste. By maintaining local disposal capacity at competitive rates, the project avoids aggregate incremental costs to Niagara customers of approximately \$13.5 million per year by 2031: \$12.4 million to IC&I generators and \$1.1 million to the Region’s curbside program, with no material effect on self-haul customers.

Table 31 assesses the indicator against the four dimensions used to characterize effects: magnitude, geographic extent, duration, and likelihood and confidence. Magnitude is measured by the avoided redirection cost in 2031, the first full operating year.

Table 31: Cost of Services Potential Effects by Indicator

Indicator	Assessment
Impact on customer cost of waste services	<p>Positive.</p> <ul style="list-style-type: none"> • Magnitude: avoids ~\$13.5M/yr of incremental disposal cost by 2031. <ul style="list-style-type: none"> – IC&I: ~\$28/tonne incremental cost, volume-weighted across the five accessible alternative landfills (transfer-station consolidation, haulage, bridge tolls, tipping fees), on ~436,500 projected tonnes: ~\$12.4M/yr. Walker’s South Landfill is the sole private-sector IC&I disposal facility in the Region. – Region curbside: ~\$28/tonne on ~39,000 projected tonnes: ~\$1.1M/yr under external redirection, the cheaper of the Region’s two options; the in-region alternative, Humberstone Road, carries a \$181/tonne full-cost-recovery rate and an 83% increase in waste landfilled there, accelerating depletion of its remaining airspace. – Self-haul: no material effect from the customer’s perspective; the Thorold depot, gate rate, and service continue, with depot waste transferred to alternative disposal. • Geographic extent: Niagara Region customers. <ul style="list-style-type: none"> – IC&I generators across the Region; curbside customers of St. Catharines, Thorold, Niagara-on-the-Lake, and select Niagara Falls routes. – Redirected IC&I waste would most likely flow to Michigan: Twin Creeks and Ridge operate at or near permitted annual capacity, and the nearest facility (Modern Landfill, New York) has about one year of constructed capacity remaining. • Duration: quantified for 2031, the first full operating year; the avoided cost is annual in nature. <ul style="list-style-type: none"> – The avoided cost arises when Phase 1 reaches capacity (~2030); volumes are grown at the Region’s adopted employment and population forecasts. • Likelihood and confidence: moderate. <ul style="list-style-type: none"> – IC&I bulk rates are confidential; current rates are estimated with a delivered-cost approach (Michigan tipping fees, haulage, Blue Water Bridge tolls), corroborated by public volume-tiered schedules (Essex-Windsor, City of

Indicator	Assessment
	<p>London). The ~\$28/tonne is the increment between estimated redirection costs and those estimated current rates; error on either side moves the totals.</p> <ul style="list-style-type: none"> – The Region’s partnership rate is confidential and assumed consistent with Walker’s bulk rate; the \$1.1M component rests on that assumption. – Volumes hold the current tonnes-per-employee and per-capita rates constant.

Against the existing-conditions baseline, the project continues current disposal access and pricing arrangements; the quantified effect arises entirely against the future baseline, in which Phase 1 closes.

5.1.4 Effects on Public Finance

This criterion evaluates the project's net fiscal impact on the municipalities and taxing authorities affected by the South Landfill Phase 2. It is assessed in three parts: the value the project contributes to the municipal assessment base, the public-sector revenue it generates, and the incremental municipal costs it imposes.

5.1.4.1 Assessment Base

This section estimates the project’s impact on the municipal assessment base across the project life. The project’s contribution to the assessment base directly determines the property tax revenue assessed in the following section.

5.1.4.2 Property Classification

The South Landfill Phase 2 comprises several physical components, each falling under a different MPAC property classification. **Table 32** summarises the three applicable property classes.

Table 32: Applicable Property Classifications and Assessment Methods

Property Class	Assessment Method	Assessable Components	Excluded Components	Applicable Phase(s)
Landfill	<ul style="list-style-type: none"> • Acreage × Local Industrial Land Rate 	<ul style="list-style-type: none"> • Waste fill area (62.57 ha) • Buffer lands (approximately 20.4 ha) 	<ul style="list-style-type: none"> • n/a 	<ul style="list-style-type: none"> • Operations and closure/post-closure (quantified)
Industrial (Buildings)	<ul style="list-style-type: none"> • Construction Cost 	<ul style="list-style-type: none"> • Maintenance shop • Site and employee offices • Weigh station / scalehouse and inspection station • Leachate lagoon • compressed air and sludge storage enclosure • Landfill gas booster station enclosure 	<ul style="list-style-type: none"> • Process equipment; landfill cells, liners, leachate collection, and landfill gas collection infrastructure. 	<ul style="list-style-type: none"> • Operations and closure/post-closure

Property Class	Assessment Method	Assessable Components	Excluded Components	Applicable Phase(s)
Pipeline	<ul style="list-style-type: none"> Construction cost 	<ul style="list-style-type: none"> LFG pipeline under Taylor Road to utilisation facility Leachate forcemain from pump station to lagoons 	<ul style="list-style-type: none"> Internal facility piping within the landfill footprint 	<ul style="list-style-type: none"> Operations and closure/post-closure

Source: (Walker Environmental Group, 2026); (Fry, 2026).

The capital investment in engineered liner systems, leachate collection infrastructure, and landfill gas collection systems is excluded from the assessable base. These components are treated as part of the landfill rather than as assessable improvements. The leachate pump station and landfill gas booster station are similarly excluded; the enclosure shells are assessable, but the process equipment within them is not. The progressive capital expenditure during operations does not contribute to the assessed value of the landfill.

5.1.4.3 Valuation Date Adjustment

MPAC assesses property values as of a fixed valuation date, periodically updated through province-wide reassessment cycles. The current valuation date is January 1, 2016, meaning all CVA figures are expressed in 2016 dollars regardless of when construction occurs. Current construction cost estimates (in 2026 dollars) must therefore be adjusted back to this valuation date.

The adjustment uses the Non-Residential Building Construction Price Index (NRBCPI) for Toronto, published by Statistics Canada. **Table 33** presents the source index values, the chain-linked 2026 index, and the resulting CVA adjustment factor. The adjustment factor is calculated as the ratio of the 2016 Q1 index, corresponding to the MPAC valuation date, to the derived 2026 index, corresponding to the construction cost estimate date.

Table 33: Non-Residential Building Construction Price Index and CVA Adjustment Factor

Index / Metric	Value	Source
NRBCPI 2016 Q1 (base 2002)	156.20	Statistics Canada (2022b)
NRBCPI 2017 Q4 (base 2002)	163.50	Statistics Canada (2022b)
NRBCPI 2022 Q4 (base 2017)	180.20	Statistics Canada (2024)
NRBCPI 2025 Q4 (base 2023)	109.60	Statistics Canada (2026d)
NRBCPI 2026 (base 2002, derived)	322.911192	Avaanz Ltd. (2026b)
MPAC Valuation Date Reference (2016 Q1, base 2002)	156.20	Statistics Canada (2022b)
CVA Adjustment Factor (2016 / 2026)	0.4837243	Avaanz Ltd. (2026b)

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

Because the NRBCPI was rebased after 2016, the index values in **Table 33** are chain-linked using overlapping quarters (2017 Q4 and 2022 Q4) to produce a 2026 index on a consistent 2002 base.

The resulting 0.4837243 CVA adjustment factor is applied to Industrial Building and Pipeline values; Landfill Class value is assessed separately on a land-value basis.

5.1.4.4 Landfill Class Assessment Value

The Landfill Class assessment is determined by site acreage and the applicable land rate. MPAC assesses landfill properties on a per-hectare basis using local industrial land rates, adjusted to reflect the Current Value Assessment (CVA) as a percentage of current market value. For this assessment, the reference land value is \$400,000 per hectare, the mid-point of the Niagara Region industrial land value range of \$300,000 to \$500,000 per hectare reported by CBRE Canada (2022). A 60% composite CVA adjustment factor is applied to translate that 2022 land-value proxy into an estimated 2016 CVA. The factor reflects both the relationship between market value and assessed CVA and the difference between the 2022 land-value reference and the 2016 MPAC valuation date. It is not prescribed by MPAC and should be interpreted as a professional judgement assumption for effects-assessment purposes. **Table 34** presents the calculation.

Table 34: Landfill Class Assessment Value

Component	Area (ha)	Reference Land Value (\$/ha)	Composite CVA Adjustment Factor	Estimated CVA per ha (2016\$)	Estimated CVA Total
Waste fill area	62.57	\$400,000	60%	\$240,000	\$15,016,800
Landfill buffer area	20.40	\$400,000	60%	\$240,000	\$4,896,000
Total Landfill Class	82.97				\$19,912,800

Source: (WSP Canada, 2026); (CBRE Canada, 2022); (Avaanz Ltd., 2026b).

The total Landfill Class CVA is \$19,912,800, comprising \$15,016,800 for the 62.57-hectare waste fill area and \$4,896,000 for approximately 20.4 hectares of buffer lands. This value applies throughout the quantified operations and closure/post-closure phases because assessable acreage is fixed once established and does not change as waste is placed or the facility transitions through its life cycle.

5.1.4.5 Industrial Class Assessment Value

The Industrial Class assessment is determined by the construction cost of assessable structures, adjusted to the 2016 valuation date using the CVA adjustment factor from **Table 33**. The estimated CVA equals construction cost multiplied by the 0.4837243 adjustment factor. **Table 35** presents the calculation for the five assessable buildings.

Table 35: Industrial Class Assessment Value

Structure	Construction Cost (2026\$)	CVA Factor	CVA (2016\$)
Maintenance shop (~600 m²)	\$500,000	0.4837243	\$241,862
Site/employee offices (~600 m²)	\$500,000	0.4837243	\$241,862
Weigh station/scales (~45 m²)	\$500,000	0.4837243	\$241,862

Structure	Construction Cost (2026\$)	CVA Factor	CVA (2016\$)
Leachate lagoon compressed air building & sludge storage enclosure	\$750,000	0.4837243	\$362,793
Landfill gas booster station enclosure	\$500,000	0.4837243	\$241,862
Total Industrial Class	\$2,750,000	0.4837243	\$1,330,242

Source: (Fry, 2026); (Avaanz Ltd., 2026b).

The total Industrial Class CVA is \$1,330,242. All five structures are assessed from commissioning (mid-2030). At closure, the weigh station, maintenance shop, and offices are removed from the assessment roll; the two enclosures remain in service for leachate and landfill gas management and continue to be assessed (\$604,655) through closure and post-closure.

5.1.4.6 Pipeline Class Assessment Value

The Pipeline Class assessment is determined by the replacement cost of assessable pipeline segments, adjusted to the 2016 valuation date using the CVA adjustment factor from **Table 33**. The estimated CVA equals replacement cost multiplied by the 0.4837243 adjustment factor. **Table 36** presents the calculation.

Table 36: Pipeline Class Assessment Value

Pipeline Segment	Length (m)	Replacement Cost (\$/m)	Replacement Cost (2026\$)	CVA Factor	CVA (2016\$)
LFG pipeline (under Taylor Rd)	100	\$2,500	\$250,000	0.4837243	\$120,931
Leachate forcemain	2,000	\$287.50	\$575,000	0.4837243	\$278,141
Total Pipeline Class	2,100		\$825,000	0.4837243	\$399,073

Source: (Fry, 2026); (Avaanz Ltd., 2026b).

The total Pipeline Class CVA is \$399,073, comprising the LFG pipeline under Taylor Road (\$120,931) and the leachate forcemain (\$278,141). These values apply to the operations and closure/post-closure phases. The pipelines are not assessed until they enter service at commissioning, and both remain in service through post-closure.

5.1.4.7 Assessment Value Across Phases

Table 37 summarises how the total project CVA varies across the quantified phases. The Landfill Class is constant throughout the quantified period. The Industrial Class is assessed in full during operations and at a reduced value during closure/post-closure, when only the two enclosures remain. The Pipeline Class is constant across both quantified phases.

Table 37: Assessed Value by Property Class and Phase

Property Class	Operations	Closure / Post-Closure
Landfill	\$19,912,800	\$19,912,800

Property Class	Operations	Closure / Post-Closure
Industrial Buildings	\$1,330,242	\$604,655
Pipeline	\$399,073	\$399,073
Total Project CVA	\$21,642,114	\$20,916,528

Source: (Avaanz Ltd., 2026b).

Total CVA is \$21.6 million during the 20-year operations phase, declining to \$20.9 million during closure/post-closure as the Industrial Class reduces to the two enclosures. The Landfill Class (approximately 92 percent of the operations-phase total) provides a stable assessment base throughout the project life.

5.1.4.8 Public-Sector Revenue

The project generates quantified public-sector revenue through two channels:

- Property taxes levied on the assessed value of the facility, and
- Leachate discharge fees paid for wastewater treatment.

Municipal own-source revenues are distinguished from the provincial education levy. Property tax revenue flows to the City of Niagara Falls and Niagara Region, while the education levy is collected through the property tax system and remitted to the Province of Ontario. Leachate discharge fees flow to Niagara-on-the-Lake and extend through operations, closure, and post-closure.

5.1.4.9 Taxes from Increases in the Assessment Base

The assessed values established in the preceding section translate into property tax revenue for two municipal taxing authorities and one provincial levy: the City of Niagara Falls (lower-tier municipal levy), Niagara Region (upper-tier regional levy), and the Province of Ontario (education levy).

5.1.4.10 Property Tax Rates

Table 38 presents the current property tax rates applicable to each of the three property classes on the project site.

Table 38: Current Property Tax Rates by Property Class and Taxing Authority

Property Class	Tax Ratio	City of Niagara Falls	Niagara Region	Education	Total Combined Rate	Rate Year
Landfill	2.9403	1.76463%	2.62909%	0.88000%	5.27372%	2025
Industrial Buildings	2.6300	1.57842%	2.35167%	0.88000%	4.81009%	2025
Pipeline	1.7021	1.02153%	1.52197%	0.88000%	3.42350%	2025

Source: (Niagara Region, 2025a); (Niagara Region, 2024a); (Ontario, 1998b).

5.1.4.11 Tax Revenue by Phase

Table 39 and **Table 40** present the estimated annual property tax and education levy revenue by property class and taxing authority for the operations and closure/post-closure phases. The estimates apply the applicable combined rate from **Table 38** to the CVA values in **Table 34** through **Table 36**, with rates held constant in real terms.

Table 39: Annual Property Tax Revenue – Operations Phase

Property Class	City of Niagara Falls	Region of Niagara	Education	Total Tax
Landfill	\$351,387	\$523,526	\$175,233	\$1,050,146
Industrial Buildings	\$20,997	\$31,283	\$11,706	\$63,986
Pipeline	\$4,077	\$6,074	\$3,512	\$13,662
Total	\$376,461	\$560,883	\$190,451	\$1,127,794

Table 40: Annual Property Tax Revenue – Closure / Post-Closure Phase

Property Class	City of Niagara Falls	Region of Niagara	Education	Total Tax
Landfill	\$351,387	\$523,526	\$175,233	\$1,050,146
Industrial Buildings	\$9,544	\$14,219	\$5,321	\$29,084
Pipeline	\$4,077	\$6,074	\$3,512	\$13,662
Total	\$365,008	\$543,819	\$184,065	\$1,092,893

Source: (Avaanz Ltd., 2026b).

During operations, the project generates approximately \$1.13 million per year in property tax and education levy revenue, driven almost entirely by the Landfill Class (\$1.05 million). At closure, the assessable building set reduces to the two enclosures and total tax-related revenue declines to approximately \$1.09 million for the duration of the closure/post-closure period. The Landfill Class accounts for over 93% of total tax-related revenue in both phases.

Niagara Region receives the largest share in each phase (approximately 50% of total property tax and education levy revenue), followed by the City of Niagara Falls (approximately 33%) and the Province of Ontario through the education levy (approximately 17%).

5.1.4.12 Fee for Service (Wastewater treatment)

Leachate generated by the facility is conveyed via forcemain to Walker’s existing lagoon system for pre-treatment and subsequently discharged to the municipal sanitary sewer system for final treatment. The receiving municipality is Niagara-on-the-Lake, which charges Walker a volumetric fee for wastewater treatment under a Sewer Use Agreement. Niagara-on-the-Lake in turn pays Niagara Region for treatment at a Regional wastewater treatment facility. This fee-for-service arrangement generates a direct, non-tax revenue stream for Niagara-on-the-Lake.

Leachate generation continues well beyond the operational life. Precipitation infiltrating the closed landfill and residual moisture within the waste mass produce leachate that must be collected and treated throughout closure and post-closure.

5.1.4.13 Fee Rate and Overstrength Surcharge

The discharge rate comprises two components: a base volumetric charge of \$1.80/m³, and, where discharge exceeds the concentration limits in Niagara Region’s Sewer Use By-law, an overstrength surcharge. Walker expects to optimize on-site pre-treatment so that discharged leachate meets the sewer use criteria; no overstrength surcharge is therefore assumed.

5.1.4.14 Discharge Fee Revenue by Phase

Table 41 presents the estimated annual leachate discharge fee revenue to Niagara-on-the-Lake by project phase, using Walker phase-average leachate volumes and Walker’s base volumetric charge.

Table 41: Leachate Discharge Fee Revenue to Niagara-on-the-Lake by Phase

Phase	Est. Annual Volume (m ³)	Base Rate (\$/m ³)	Est. Overstrength Surcharge (\$/m ³)	Total Rate (\$/m ³)	Annual Fee Revenue
Operations	89,563	\$1.80	\$0.00	\$1.80	\$161,213
Closure / Post-Closure	135,640	\$1.80	\$0.00	\$1.80	\$244,152

Source: (Walker Environmental Group, 2026); (Fry, 2026); (Niagara Region, 2024b); (Avaanz Ltd., 2026b).

During operations, an estimated 89,563 m³ on average per year of leachate discharge generates approximately \$161,000 in annual revenue. During closure and post-closure, the estimated average volume increases to 135,640 m³ per year, producing approximately \$244,000 in annual revenue. Niagara-on-the-Lake’s leachate fee revenue therefore increases at closure and persists for the duration of the post-closure monitoring period.

5.1.4.15 Summary of Quantified Public-Sector Revenue

Table 42 consolidates the quantified revenue streams across municipal and provincial recipients and project phases, presenting estimated average annual revenue by recipient and source.

Table 42: Estimated Average Annual Public-Sector Revenue by Recipient, Source, and Phase

Recipient	Revenue Stream	Operations	Closure / Post-Closure
City of Niagara Falls	Property tax	\$376,461	\$365,008
Niagara-on-the-Lake	Fee for Service (Leachate)	\$161,213	\$244,152
Region of Niagara	Property tax	\$560,883	\$543,819
Province of Ontario (Education Levy)	Education levy	\$190,451	\$184,065
All recipients	Property tax and education levy	\$1,127,794	\$1,092,893
All recipients	Fee for Service (Leachate)	\$161,213	\$244,152

Recipient	Revenue Stream	Operations	Closure / Post-Closure
All recipients	Total quantified revenue	\$1,289,007	\$1,337,045

Source: (Avaanz Ltd., 2026b).

Niagara Region is the largest beneficiary, receiving approximately \$544,000 to \$561,000 per year in property tax depending on phase, followed by the City of Niagara Falls (\$365,000 to \$376,000). Niagara-on-the-Lake receives no property tax but is the sole recipient of leachate discharge fee revenue, which increases from approximately \$161,000 during operations to \$244,000 during closure/post-closure, the longest-duration non-tax revenue stream associated with the project.

The Province of Ontario receives the education levy (approximately \$184,000 to \$190,000 per year).

Total quantified public-sector revenue increases modestly at the transition from operations to closure, from \$1,289,007 to \$1,337,045, due to higher leachate volumes.

5.1.4.16 Other Public-Finance Items: Royalty Payments

Potential royalty or host-community payment arrangements are not included in the quantified public-finance assessment. Any such arrangements will be considered outside the environmental assessment process and incorporated, if applicable, through separate discussions between Walker and the relevant municipalities.

5.1.4.17 Municipal Cost

The project imposes costs on municipal governments through two channels: general wear on municipal infrastructure from facility-related traffic and the incremental cost of treating leachate discharged to the regional wastewater system.

5.1.4.18 General Infrastructure Wear

Landfill operations generate heavy vehicle traffic on municipal roads serving the facility, including haul trucks delivering waste and service vehicles supporting daily operations. This traffic imposes wear on road surfaces, bridges, and related infrastructure maintained by the municipalities through which waste is routed. The cost of this infrastructure wear is real but difficult to isolate. For the purposes of this assessment, general infrastructure wear is acknowledged as a municipal cost but is not independently quantified.

5.1.4.19 Wastewater Treatment Cost

The second quantifiable municipal cost is the incremental burden that leachate discharge places on the regional wastewater system. As described in the Fee for Service section, Walker discharges pre-treated leachate to the municipal sanitary sewer system, where it is conveyed to a Niagara Region wastewater treatment plant for final treatment.

Understanding this cost requires distinguishing between average cost and marginal cost. **Table 43** summarises the Regional wastewater cost structure.

Table 43: Niagara Region Wastewater Treatment Cost Structure

Metric	Value	Unit	Source
Average Cost (Budget)	\$1.62	per m ³	Niagara Region (2025b)
Fixed Cost Share	94%	%	Niagara Region (2025c)
Variable Cost Share	6%	%	Niagara Region (2025c)
Marginal Operational Cost	\$0.0972	per m ³	Avaanz Ltd. (2026b)
Regional Volume Treated (2024)	71,731,000	m ³	Niagara Region (2025d)

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

The average budgetary cost to treat wastewater across the Regional system is \$1.62 per cubic metre. However, approximately 94 percent of the Regional wastewater budget is fixed (labour, debt servicing, administration, and infrastructure maintenance that does not vary with treatment volume). Only approximately 6 percent represents truly variable costs: chemicals and variable electricity for pumping. The marginal operational cost of treating one additional cubic metre is therefore \$0.0972 per cubic metre (approximately \$0.10), a fraction of the average cost.

Table 44 applies the marginal cost from **Table 43** to the phase-average leachate volumes. **Table 45** places the leachate volume in the context of the Regional system's total treated volume, holding the Regional 2024 treated volume constant for comparison purposes.

Table 44: Estimated Incremental Wastewater Treatment Cost by Phase

Phase	Volume of Leachate (m ³)	Marginal Cost (\$/m ³)	Annual Treatment Cost
Operations	89,563	\$0.0972	\$8,706
Closure / Post-Closure	135,640	\$0.0972	\$13,184

Source: (Avaanz Ltd., 2026b).

Table 45: Leachate Volume as Share of Regional Wastewater System

Metric	Operations	Closure / Post-Closure
Annual Leachate Volume (m³)	89,563	135,640
Total Regional Volume (m³)	71,731,000	71,731,000
Leachate as % of Regional Volume	0.12%	0.19%

Source: (Walker Environmental Group, 2026); (Niagara Region, 2025d); (Avaanz Ltd., 2026b).

The leachate volume represents 0.12% of the Regional system's total treated volume during operations and 0.19% during closure/post-closure. This is a marginal addition to a system treating over 71 million cubic metres per year across 11 facilities. The incremental demand does not require capacity expansion or capital investment in additional treatment infrastructure. The receiving plant has sufficient capacity to accommodate the leachate volume within its existing design parameters.

The annual incremental treatment cost to the Regional system is approximately \$8,700 during operations and \$13,200 during closure/post-closure. These figures are a small fraction of the leachate discharge fee revenue received by Niagara-on-the-Lake.

5.1.4.20 Summary of Potential Effects on Public Finance

The effect on public finance is assessed through three ToR indicators: the impact on the assessment base, the impact on municipal revenue, and the impacts on municipal cost. The indicators are reported separately. The assessment base and municipal revenue indicators are positive; the municipal cost indicator is adverse but small, with one component quantified and one acknowledged but not quantified. The education levy is included as a provincial fiscal flow and is not counted as municipal own-source revenue.

Table 46 assesses each indicator against the four dimensions used to characterize effects: magnitude, geographic extent, duration, and likelihood and confidence. Magnitude is measured by estimated assessed value and by annual revenue and cost.

Table 46: Public Finance Potential Effects by Indicator

Indicator	Assessment
Impact on assessment base	<p>Low Positive.</p> <ul style="list-style-type: none"> • Magnitude: adds ~\$21.6M CVA (2016 dollars) during operations; ~\$20.9M during closure/post-closure. <ul style="list-style-type: none"> – Landfill Class ~\$19.9M (82.97 ha at a \$400,000/ha reference value × 60% composite CVA factor): ~92% of the operations total. – Industrial Buildings ~\$1.33M (five structures), reducing to ~\$0.60M (two enclosures) at closure; Pipeline ~\$0.40M. – Liners, leachate collection, landfill gas infrastructure, and process equipment are not assessable; progressive capital during operations adds no assessed value. • Geographic extent: the project site, taxed in the City of Niagara Falls, under MPAC’s Landfill, Industrial, and Pipeline classes. • Duration: assessed from commissioning (mid-2030) through post-closure; the construction phase is not quantified; the Landfill Class is constant once established. • Likelihood and confidence: moderate. <ul style="list-style-type: none"> – Industrial and Pipeline values apply the NRBCPI adjustment (0.4837243) to reach the 2016 valuation date. – The Landfill Class rests on a 2022 land-value midpoint (CBRE, \$300,000–\$500,000/ha) and a 60% composite factor the report identifies as a professional-judgement assumption, not an MPAC-prescribed rate.
Impact on municipal revenue	<p>Low Positive.</p> <ul style="list-style-type: none"> • Magnitude: ~\$1.29M/yr quantified public-sector revenue during operations; ~\$1.34M/yr during closure/post-closure. <ul style="list-style-type: none"> – Property tax and education levy: ~\$1.13M/yr operations, ~\$1.09M/yr closure/post-closure; the Landfill Class accounts for over 93%. – Leachate fee for service: ~\$161,000/yr operations rising to ~\$244,000/yr closure/post-closure (\$1.80/m³ on phase-average volumes; no overstrength surcharge assumed). – Royalty or host-community arrangements are excluded; any would be addressed outside the EA process. • Geographic extent: Niagara Region (~50% of tax-related revenue), City of Niagara Falls (~33%), Province of Ontario via the education levy (~17%); Niagara-on-the-Lake receives the leachate fee and no property tax.

Indicator	Assessment
	<ul style="list-style-type: none"> • Duration: tax revenue through operations and closure/post-closure; the leachate fee persists through the post-closure monitoring period. Total quantified revenue rises at the transition to closure (\$1,289,007 to \$1,337,045) on higher leachate volumes. • Likelihood and confidence: moderate. <ul style="list-style-type: none"> – Rates are the 2025 rates, held constant in real terms; revenue inherits the assessment-base assumptions. – Leachate volumes are Walker phase averages; the no-surcharge assumption depends on pre-treatment performance. – No municipal finance interviews were achieved despite requests to all five municipalities; the quantification rests on published rates and by-laws and Walker inputs.
Impacts on municipal cost	<p>Low adverse, fully offset; not a significant adverse effect.</p> <ul style="list-style-type: none"> • Magnitude: quantified incremental wastewater treatment cost of ~\$8,700/yr during operations and ~\$13,200/yr during closure/post-closure. <ul style="list-style-type: none"> – Costed at the marginal rate (\$0.0972/m³, the 6% variable share of the \$1.62/m³ average), not the average rate. – General infrastructure wear from facility traffic is acknowledged as a municipal cost but not quantified. • Geographic extent: the Regional wastewater system for the quantified cost; municipal roads along waste routes for the unquantified wear. <ul style="list-style-type: none"> – Leachate is 0.12% (operations) to 0.19% (closure/post-closure) of regional treated volume; no capacity expansion or capital investment is required. • Duration: follows leachate volumes through operations, closure, and post-closure; the cost rises at closure with volume. • Likelihood and confidence: moderate. <ul style="list-style-type: none"> – The marginal-cost basis uses the Region’s budgeted cost structure; volumes are Walker phase averages. – Infrastructure wear is the indicator’s one unquantified component.

Under the future baseline, the existing site’s assessment, tax, and discharge-fee contributions contract following closure and rehabilitation; the project’s quantified contributions are additional to that contracting base.

The municipal cost effect is characterized below against the No / Low / Moderate / High framework.

Criterion	Municipal cost (incremental wastewater treatment)
Magnitude	Negligible. About \$8,700 to \$13,200 per year at the marginal rate; 0.12 to 0.19% of the regional system, requiring no capacity expansion.
Duration	Long-term. Follows leachate volumes through operations, closure, and post-closure.
Frequency	Not the operative dimension; the cost is a small recurring annual amount.
Reversibility	Readily offset. Covered by the leachate fee revenue from the same volumes.
Spatial extent	Small. A marginal load on the regional wastewater system.
Social / ecological impact	Few or minor. No capacity or service-level consequence.

Criterion	Municipal cost (incremental wastewater treatment)
Mitigation effectiveness	Not needed. The cost is offset by fee revenue; quantified benefits exceed quantified costs in each phase.
Significance	Low adverse, fully offset; not significant (non-adverse net).

No mitigation or compensation measures are required for this criterion. The only quantified municipal cost, the incremental wastewater treatment cost, is recovered through the leachate discharge fees on the same leachate volumes, which Walker pays to Niagara-on-the-Lake and Niagara-on-the-Lake pays to the Region for treatment, and therefore does not give rise to a net municipal cost.

5.1.5 Summary of Potential Effects on Economics

This section summarises the potential effects identified under the four evaluation criteria. The paragraphs that follow summarise the findings under each criterion; the potential effect on each indicator, the proposed impact management measures, and the resulting net effects are consolidated in the net effects summary in Section 5.3.

The effect on the local economy is positive, with one exception at a single business. No business or farm is displaced: the expansion footprint lies entirely on Walker-owned land. Construction generates approximately \$249 million in GDP, \$132 million in labour income, and 1,394 FTE jobs across Ontario over the construction program, and operations generate approximately \$12.5 million in GDP, \$7.2 million in labour income, and 84 FTE jobs across Ontario each year, with a substantial share retained within the LSA and RSA. Business opportunities and labour-market effects are beneficial; operating labour demand is well under one percent of LSA employment in the relevant occupational category, and Walker plans construction staging and subcontract procurement around the peak activity of competing projects in a tight construction labour market. During the transitional Impact 1 period, when the closing Phase 1 landfill, the Quarry, and the Phase 2 Stage 1 operate together, brief increases above baseline are predicted: 24-hour dust concentrations above the 120 µg/m³ criterion at three receptors (sixteen exceedance days over the five-year modelling period at the Royal Niagara Golf Club, and one day at each of the other two), ten-minute odour frequencies above the 3 OU threshold at or above the 0.5% (~44 hr/yr) threshold at five receptors, and a predicted daytime continuous sound level of 59 dBA against the 55 dBA criterion at the golf club. These effects decline once the Quarry is retired: dust meets its criterion at every assessed receptor under Impacts 2 and 3, odour frequencies above 3 OU fall below 0.5% at all receptors, with CR17 the highest at 0.48% under Impact 2, and continuous sound returns below the criterion, with most predicted values falling below existing conditions. Across the twelve potentially sensitive businesses, the predicted nuisance effects do not threaten the productivity or viability of any business. The exception is Gauld Nurseries (CR17), the nearest sensitive business, where landfill odour is predicted to increase above existing conditions on a persistent basis as filling progresses toward, and later away from, the receptor: the frequency

above the 3 OU threshold rises from none at baseline to 0.48% of the time (~ 42 hr/yr)³ under Impact 2, before easing to 0.3% (~ 26 hr/yr) under Impact 3. This is identified as a potential low adverse business effect, but not of a magnitude to threaten the productivity or viability of the nursery.

The effect on real estate shows no measurable impact, carried with a precautionary low adverse potential at the homes nearest the site. Four control-area comparisons spanning 1,828 residential sales from January 2009 to February 2026 found no evidence that the project announcement affected residential property values in the study areas; the one statistically significant full-period result, in Downtown Thorold and Merritton, reflects a market divergence that began around 2017, roughly six years before the announcement. Post-announcement samples in the rural bands are small (two study-area sales in each band), and the one further estimate that approached significance (the band between 1,000 and 2,000 metres, $p = 0.068$) rests on those sales and is not reproduced in the band within 1,000 metres or the combined band. The receptor screening and the operating record of the existing South Landfill support the same conclusion for the operating period, and no measurable effect on residential property values is anticipated. A low adverse effect cannot be excluded at the individual properties nearest the site, where the project introduces odour above the 3 OU recognition threshold where none exists today and the transaction record is too sparse to verify a no-effect conclusion property by property; the report carries this as a precautionary potential low adverse effect, addressed by the Property Value Protection Program in Section 5.2.

The effect on the customer cost of waste services is beneficial. Under the Do Nothing scenario, closure of the South Landfill would impose aggregate incremental costs on Niagara customers of approximately \$13.5 million per year by 2031 (approximately \$12.4 million to IC&I generators and \$1.1 million to the Region's curbside program), with no material effect on self-haul customers. The project avoids these costs by maintaining local disposal capacity at competitive rates.

The effect on public finance is positive. The project adds approximately \$21.6 million to the municipal assessment base and generates quantified public-sector revenue of approximately \$1.29 million per year during operations, rising to approximately \$1.34 million during closure and post-closure, driven by higher leachate volumes, and declining over time as those volumes eventually diminish. The revenue is distributed among the City of Niagara Falls, Niagara-on-the-Lake, Niagara Region, and the Province through the education levy. The quantified municipal cost (an incremental wastewater treatment cost of approximately \$8,700 to \$13,200 per year) is small relative to the leachate discharge fee revenue generated by the same volumes (approximately \$161,000 rising to \$244,000 per year), and quantified fiscal benefits exceed quantified municipal costs in each assessed phase. General infrastructure wear is acknowledged as a municipal cost but is not independently quantified. The project also preserves the existing site's assessment, tax, and discharge-fee contributions, which would otherwise erode under the Do Nothing scenario.

3. The frequency above 3 OU at CR17 is reported as 0.48% (≈ 42 hr/yr) rather than rounded to 0.5%, to reflect that it remains just below the 0.5% frequency the Air Quality assessment applies as the threshold of acceptability. RWDI's results tables round this value to 0.5%; its supporting text reports 0.48%.

Taken together, the four criterion assessments identify potential effects that are predominantly beneficial or neutral. Four effects run in the adverse direction, none of them significant: the transitional dust at the Royal Niagara Golf Club, the persistent odour at Gauld Nurseries, the precautionary potential for a property value effect at the nearest homes, and the incremental wastewater treatment cost. The treatment cost is recovered through the fee on the same leachate volumes, which Walker pays to Niagara-on-the-Lake and Niagara-on-the-Lake pays to the Region for treatment. The Gauld Nurseries odour represents a potential low adverse business effect, limited to one business and not predicted to threaten productivity or viability. The property value potential is precautionary, not measured, and is addressed by the Property Value Protection Program. The transitional dust at the Royal Niagara Golf Club is confined to the Impact 1 period. Read against the Do Nothing condition, in which South Landfill Phase 1 closes and the Quarry is rehabilitated, the expansion sustains, over the operating life, landfill-related dust, odour, and noise that would otherwise decline to the residual levels of the continuing campus operations; the significance of each effect is determined against the absolute predicted values and their applicable thresholds, not the choice of comparator. No significant adverse effect on economics is identified for any criterion.

5.2 Proposed Mitigation and Compensation Measures

The assessment in Section 5.1 identified effects that run in the adverse direction under three criteria, none of them significant. Under the local economy criterion, the transitional dust at the Royal Niagara Golf Club (CR21) does not require a dedicated economics measure. The persistent residual odour at Gauld Nurseries (CR17) is carried forward as a potential low adverse business effect and is addressed through the local plant-material sourcing measure described below. Under the public finance criterion, the incremental wastewater treatment cost is recovered through the leachate discharge fees on the same leachate volumes, which Walker pays to Niagara-on-the-Lake and Niagara-on-the-Lake pays to the Region for treatment, and requires no measure. A Property Value Protection Program is also recommended on a precautionary basis for the residential properties nearest the site under the real estate criterion. It is described below.

5.2.1 Local Plant-Material Sourcing

As an additional impact management measure, Walker will seek to source plant material required for site landscaping, screening, restoration, rehabilitation, and related works from local nursery and landscape suppliers, where practical. Local sourcing will be subject to availability, plant suitability, quality, schedule, price, and Walker's procurement requirements. The measure is expected to create incremental local sales opportunities for nursery and landscape suppliers. Given the low magnitude and infrequent nature of the predicted nuisance effect, these local purchasing opportunities would provide an economic offset to any nuisance-related reduction in business activity that could arise from the residual odour effect.

5.2.2 Property Value Protection Program

It is recommended that a new precautionary PVPP be drafted to recognize the potential for adverse property value effects of the landfill expansion.

Although additional work is required to specify the details of such a Plan the following elements are recommended:

- ◆ residential properties within approximately 1 km of the Phase 2 limit of fill as eligible for the PVPP, inclusion should reflect those most likely to experience nuisance effects from the landfill;
- ◆ develop a single program applicable to all eligible property owners;
- ◆ exclude subsequent property owners from eligibility;
- ◆ maintain the general approach included in the current program;
- ◆ consider inclusion of a buy out clause, though not necessary given the current structure it is an additional feature favoured by some in the community; and
- ◆ place no restriction on participants filing complaints, rather the program should encourage and promote good communications between the company and its neighbours.

5.3 Net Effects

The net effects on economics were determined by applying the proposed impact management measures to the effects identified in Section 5.1. The remaining effects on economics are beneficial or neutral, and no significant adverse effect on economics is identified for any criterion. **Table 47** summarises the potential effect on each indicator, the proposed impact management measure, and the resulting net effect.

At CR17 (Gauld Nurseries), the persistent odour above the 3 OU recognition threshold is carried as a potential low adverse business effect. The local plant-material sourcing measure described in Section 5.2 is expected to create incremental local sales opportunities and would provide an economic offset to any nuisance-related reduction in business activity that could arise from the residual odour effect. On this basis, the potential low adverse business effect is reduced to no net adverse effect. At the residential properties nearest the site, where a property value effect cannot be ruled out on the area-level market evidence, the precautionary PVPP described in Section 5.2 ensures that any such effect does not translate into a net financial impact at the time of sale. With these measures in place, no significant adverse net effect on economics is anticipated.

Table 47: Economic Potential Effects, Proposed Impact Management Measures, and Net Effects

Evaluation Criterion	Indicator	Potential Effect	Impact Management Measures	Net Effect
Effect on the Local Economy	Disruption / displacement of businesses (including tourism and farms)	Low adverse. Dust at the Royal Niagara Golf Club (CR21) is transitional (Impact 1); odour at Gauld Nurseries (CR17) is persistent but low (3 OU 0.3 to 0.48% of the time). No business or farm is displaced; no viability threat.	Local plant-material sourcing for plant material required for site landscaping, screening, restoration, rehabilitation, and related works, subject to availability, plant suitability, quality, schedule, price, and Walker's procurement requirements. The measure is expected to provide an economic offset to any nuisance-related reduction in business activity.	No net adverse effect; not significant.
Effect on the Local Economy	Business opportunities	Low Positive. Capital and recurring annual operating expenditure, predominantly local.	None required.	Low Positive.
Effect on the Local Economy	Impact on direct, indirect, and induced employment	Low Positive. Approximately 1,394 FTE over the construction program; 84 FTE per year in operations, under 1% of LSA employment.	None required.	Low Positive.
Effect on the Local Economy	Impact on direct, indirect, and induced GDP	Low Positive. Approximately \$249M GDP over the construction program; \$12.5M per year in operations.	None required.	Low Positive.
Effect on the Local Economy	Retention of economic benefits within local economy	Low Positive. A substantial share of the project's GDP and labour income is retained within the LSA and RSA.	None required.	Low Positive.
Effect on Real Estate	Property value impacts	No measurable effect detected; precautionary low adverse potential at the homes nearest the site, where persistent odour above 3 OU is introduced and the transaction record is sparse.	Precautionary Property Value Protection Program for the nearest residential properties (Section 5.2).	No net adverse effect; not significant.
Effect on Public Finance	Impact on assessment base	Low Positive. Adds approximately \$21.6M CVA during operations; \$20.9M through closure and post-closure.	None required.	Low Positive.

Evaluation Criterion	Indicator	Potential Effect	Impact Management Measures	Net Effect
Effect on Public Finance	Impact on municipal revenue	Low Positive. Approximately \$1.29M per year during operations, rising to \$1.34M through closure and post-closure.	None required.	Low Positive.
Effect on Public Finance	Impacts on municipal cost	Low adverse, fully offset. Incremental wastewater treatment of approximately \$8,700 to \$13,200 per year; general infrastructure wear acknowledged but not quantified.	Recovered through the leachate fees on the same volumes (\$161,000 to \$244,000 per year): Walker pays Niagara-on-the-Lake, which pays the Region for treatment; no measure required.	Not significant (non-adverse).
Effect on Cost of Services	Impact on customer cost of waste services	Low Positive. Avoids approximately \$13.5M per year (2031) of waste-redirection cost that would arise under the Do Nothing scenario.	None required.	Low Positive.

6. Cumulative Impact Analysis

As part of the approved Terms of Reference (ToR), Walker committed to undertaking an assessment of the cumulative effects of the landfill and other Campus components/facilities and other non-Walker projects that are existing, planned, approved or reasonably foreseeable. The following were considered in the assessment of cumulative impacts:

- Walker Activities/Projects on Campus
 - Ongoing quarry operations
 - New residential drop off area
 - RNG 2 – expansion of existing renewable natural gas facilities
- Walker Projects off Campus
 - Uppers Quarry
- Non-Walker Projects
 - Garden City Bridge Twinning
 - Glendale Secondary Plan Area development
 - Development at Niagara College’s Niagara-on-the-Lake Campus
 - Northwest Secondary Plan Area development
 - Golf course/agro-tourism development to east of the Walker Campus
 - Garner West Secondary Plan Area development
 - Welland Thorold Power Line Project

From an economics perspective, the potential low adverse business effect associated with residual odour at Gauld Nurseries (CR17) is addressed through the local plant-material sourcing measure described in Section 5.2, and no residual adverse economic effect remains. The other adverse-direction effects identified in the summary, namely the transitional dust at the Royal Niagara Golf Club, the fully offset incremental wastewater treatment cost, and the precautionary potential property value effect addressed through the Property Value Protection Program, are time-limited, fully offset, or precautionary and accordingly do not combine with the projects and activities listed above to produce an adverse cumulative economic effect.

7. Climate Change Considerations

In accordance with the Minister-approved ToR, the detailed impact assessment is to include consideration of climate change. In support of the province of Ontario's Climate Change Action Plan, the Ministry of the Environment, Conservation and Parks (MECP) developed a Guide entitled "Consideration of Climate Change in Environmental Assessment in Ontario" (the Guide) to aid proponents in considering climate change as part of EAs for infrastructure and facilities (MECP 2016).

The Guide outlines the Ministry's expectations for considering climate change throughout the EA process. As stated in Section 3 of the Guide, consideration is to include:

- Greenhouse gas (GHG) emissions
- Effects of a project on climate change
- Effects of climate change on a project
- How the project will minimise identified negative effects on climate change.

The preceding was considered as part of the South Landfill Phase 2 EA in addressing the potential climate risks to the Alternative Methods. During the impact assessment, the climate change adaptation and mitigation analysis undertaken for the Alternative Methods stage was used and augmented, as needed, to develop climate change mitigation and adaptation measures for the Preferred Method. Climate change considerations relevant to economics are documented in the following subsections.

7.1 Potential effects of the Undertaking on Climate Change

Climate change considerations for the Undertaking were evaluated in accordance with MOECC's Consideration of Climate Change in Environmental Assessment in Ontario, which identifies greenhouse gas emissions, the effects of a project on climate change, the effects of climate change on a project, and measures to minimise climate-related effects as key considerations in the EA process (Ministry of the Environment and Climate Change, 2017).

Consistent with the common climate change scenario applied across the EA, the assessment considered the Representative Concentration Pathway (RCP) 8.5 high-emissions scenario, which provides a conservative basis for assessing potential climate-related risks and vulnerabilities in Niagara Region. Regional projections under this scenario identify increases in temperature, annual precipitation, and the frequency and intensity of extreme weather events (Toronto and Region Conservation Authority, 2022).

Potential effects of the Undertaking on climate change are primarily associated with greenhouse gas emissions generated during construction, waste haulage, landfill operations, and landfill gas generation. Construction and operation of the expanded landfill may generate emissions from equipment use, fuel combustion, material transport, and ongoing site operations. Landfill gas

generated through waste decomposition may also contribute to greenhouse gas emissions, particularly methane, if not collected and managed (Ministry of the Environment, Conservation and Parks, 2021).

The Undertaking also avoids the transportation emissions that would arise under the future baseline (Do Nothing) scenario, in which waste currently disposed at the South Landfill would be redirected to alternative landfills in southwestern Ontario and Michigan. Based on the same projected tonnages, transfer-trailer capacity, and haul distances used in the Cost of Services assessment, redirecting approximately 475,000 tonnes per year (2031) would require approximately 12,500 transfer-trailer round trips annually over an average one-way distance of approximately 308 kilometres, generating approximately 7.7 million truck-kilometres and consuming approximately 3.0 million litres of diesel fuel each year. Applying Environment and Climate Change Canada combustion factors for heavy-duty diesel vehicles (Environment and Climate Change Canada, 2026), the avoided transportation emissions are estimated at approximately 8,200 tonnes of CO₂e per year, or on the order of 164,000 tonnes of CO₂e over the 20-year operating life. These estimates address transportation emissions only. Reduced haul distances also decrease vehicle idling and traffic-related emissions associated with longer transportation routes.

The use of existing Campus infrastructure and servicing may also reduce the need for development of a new standalone landfill facility and associated supporting infrastructure, thereby reducing construction-related emissions and resource use. Landfill gas collection and management measures associated with the Undertaking may assist in reducing fugitive methane emissions from waste decomposition, consistent with applicable provincial landfill gas management requirements and guidance (Ministry of the Environment, Conservation and Parks, 2021). Where feasible, landfill gas management measures, including collection, flaring, or beneficial use of landfill gas, may contribute to reductions in greenhouse gas emissions associated with landfill operations.

The beneficial use of landfill gas for renewable energy applications, where feasible, may also support reductions in reliance on conventional fossil fuel-based energy sources and contribute to broader climate change mitigation objectives. The capture and use of landfill gas or renewable natural gas may reduce fugitive methane emissions while also offsetting the use of conventional natural gas derived from non-renewable fossil fuel sources.

7.1.1 Mitigation

From an economics perspective, no mitigation measures are required in respect of the climate-change effects beyond those embedded in the facility design. The principal climate mitigation features of the Undertaking, including the engineered landfill gas collection system, enclosed flaring, and the beneficial use of landfill gas, are described in the Facility Characteristics Report, and the avoided transportation emissions described above are inherent to maintaining local disposal capacity rather than exporting waste to distant facilities.

7.2 Potential effects of Climate Change on the Undertaking

From an economics perspective, the principal consideration is whether the conclusions of this assessment remain valid under the climate conditions projected for Niagara Region under the RCP 8.5 scenario. Two effects are relevant. First, increased precipitation and extreme weather are projected to increase leachate generation over time; because both the leachate discharge fee revenue to Niagara-on-the-Lake and the Region's incremental treatment cost quantified in the Public Finance assessment scale with the same volumes, the net public-finance conclusions are not sensitive to this change. Second, escalation in fuel and transportation costs, including any future carbon-related costs, would increase the delivered cost of exporting waste to distant alternative landfills by more than the cost of local disposal; the Cost of Services conclusions are therefore conservative under climate-change conditions. Physical vulnerabilities of landfill infrastructure to climate change, such as those identified in Section 6.7 of the Ontario Provincial Climate Change Impact Assessment, are addressed through facility design and are assessed by the engineering disciplines; no additional economic vulnerability has been identified.

7.2.1 Adaptation

No economics-specific adaptation measures are required. Adaptation to projected climate conditions is incorporated in the facility design, including stormwater and leachate management infrastructure, as described in the Facility Characteristics Report.

8. Environmental Monitoring

To ensure that any mitigation measures agreed with Walker (see the Proposed Mitigation and Compensation Measures section above) are implemented as envisioned, a strategy and schedule was developed for monitoring environmental effects. No economics-specific commitments are proposed (see the Commitments section).

8.1 Environmental Effects Monitoring

The economic effects identified in this assessment are predominantly beneficial or fall below the thresholds at which a significant adverse effect would arise; mitigation and compensation measures for the adverse effects are to be discussed with Walker (see the Proposed Mitigation and Compensation Measures section). No dedicated economic effects-monitoring program is required. The potential adverse economic effects that were identified are nuisance-driven: the potential for dust, odour, noise, traffic, and visual intrusion to disrupt LSA businesses, and the related potential for property-value effects. The conditions that govern these effects are monitored under the effects-monitoring programs established by the Air Quality, Noise and Vibration, and Transportation disciplines, together with Walker’s ongoing complaint-tracking and response record. **Table 8.1** sets out the proposed monitoring requirements for each potential economic effect, cross-referencing the discipline monitoring that addresses the underlying nuisance conditions.

Table 48: Economics Proposed Monitoring Requirements

Potential Effect	Proposed Monitoring Requirement	Associated Licences, Permits or Authorizations
Potential disruption to LSA businesses from nuisance effects (dust, odour, noise, traffic, visual intrusion)	No economics-specific monitoring required. The underlying nuisance conditions are monitored at the common receptors under the Air Quality, Noise and Vibration, and Transportation effects-monitoring programs. Complaints are tracked and addressed through Walker’s established complaint-response record.	Environmental Compliance Approval (air and noise); landfill operating approval; conditions of EA approval
Potential effect on residential property values	No monitoring required. No measurable effect identified. The governing nuisance conditions are monitored under the Air Quality, Noise and Vibration, and Transportation programs noted above.	None specific to economics
Effects on the local economy and public finance (beneficial)	No monitoring required. Fiscal outcomes are realized through standard mechanisms: MPAC property assessment, municipal and regional taxation, and the Niagara-on-the-Lake Sewer Use Agreement governing leachate discharge fees.	MPAC assessment; municipal tax by-laws; Sewer Use Agreement
Customer cost of waste services (beneficial)	No monitoring required. The beneficial effect is realized by maintaining local disposal capacity at competitive rates.	None specific to economics

8.2 Development of an Environmental Management Plan

An Environmental Management Plan (EMP) will be prepared following approval of the undertaking by the Minister of the Environment, Conservation and Parks and prior to construction. The EMP will include a description of the proposed mitigation measures, commitments, and monitoring.

9. Commitments

No economics-specific commitments are required to address adverse effects. Walker may choose to make other commitments outside the environmental assessment process.

10. Economics Approvals Required for the Undertaking

No economics approvals are required for the undertaking.

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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

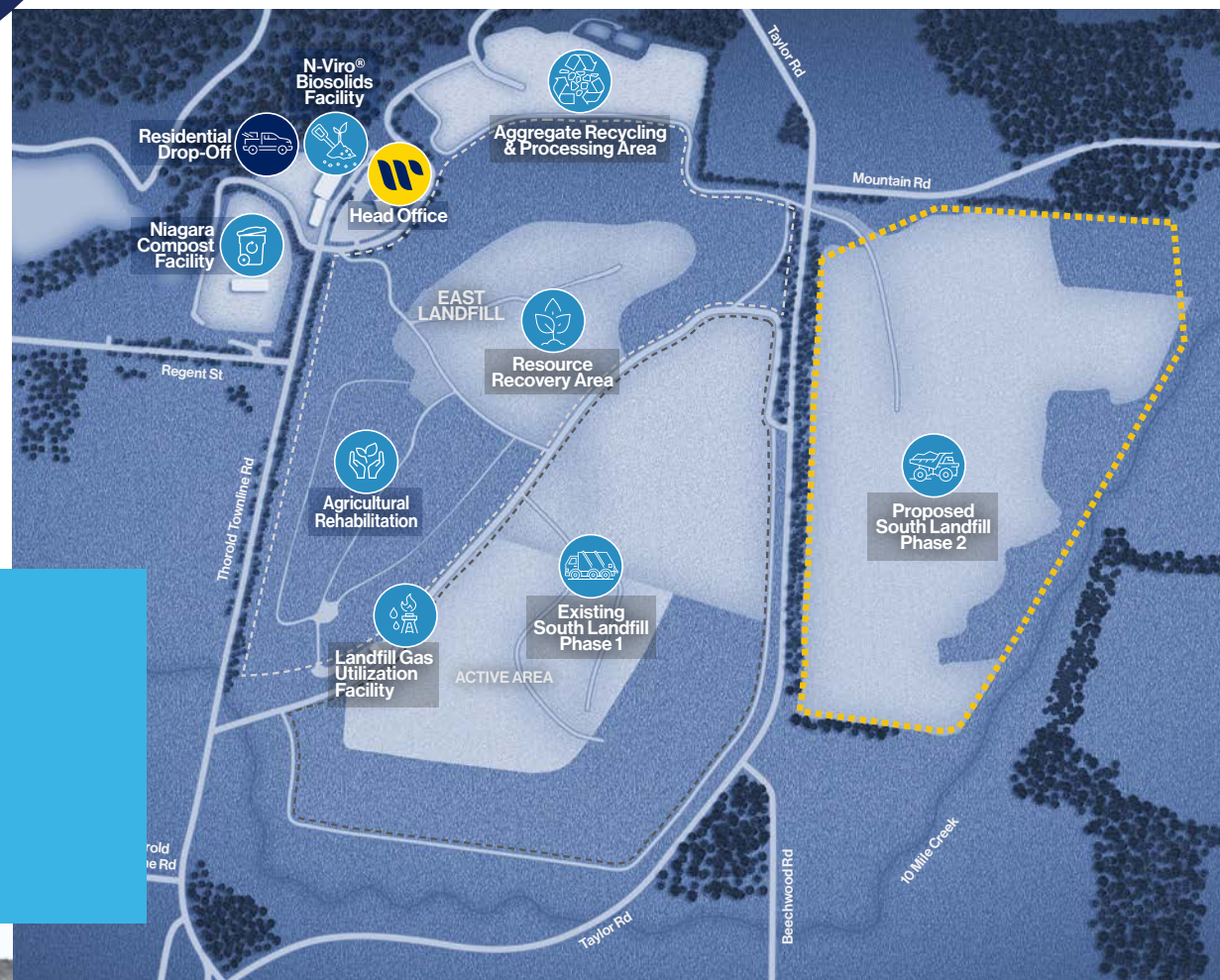


Safe & Reliable Waste Management

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

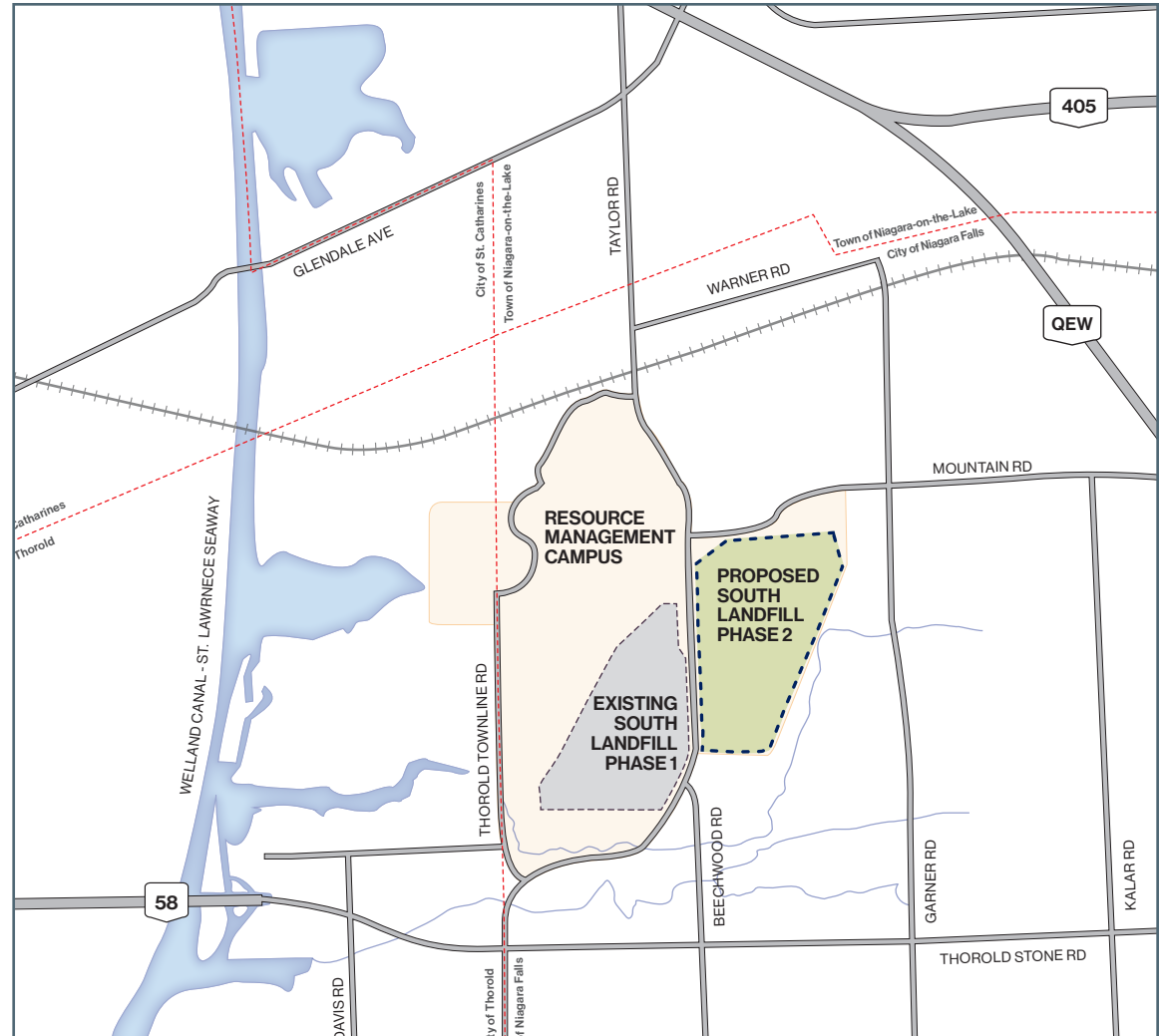
The South Landfill is a state-of-the-art, engineered landfill designed with exceptional safety and environmental controls that accepts only solid non-hazardous waste.

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



~500 jobs supported in Niagara



18 million m³ total capacity



Enough energy to power the equivalent of 10,000 homes

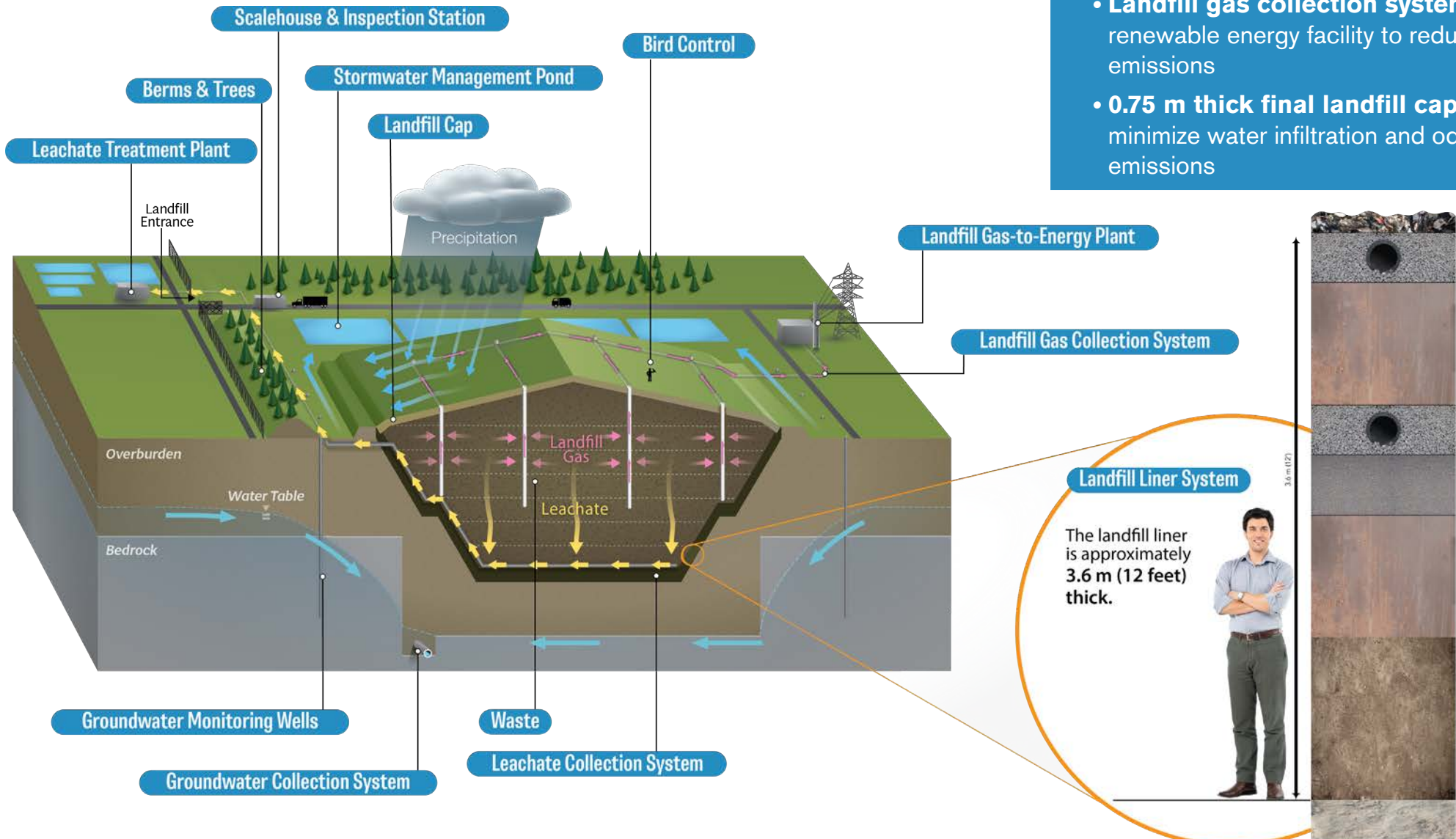


20 years of safe disposal

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



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?