

Parcel



City of Pickering Federal Lands

**Land Use Review and Economic Analysis
Recommendation Report**

MAY 2026

City of
PICKERING

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Report Structure

Executive Summary



In 1972, approximately 7,500 hectares of land located in the northwest part of Pickering as well as lands in Markham, Whitchurch-Stouffville and Uxbridge were expropriated by the Federal Government for the development of a future airport. In 2015 and 2017, approximately 4,000 hectares of the expropriated land was transferred to Parks Canada to further expand the adjacent Rouge National Urban Park. The Federal Government currently retains about 3,700 hectares of land which was intended for an airport and is currently leased for agricultural, residential and commercial uses.

In January 2025, the Federal Government announced that the expropriated lands in Pickering (the Pickering Federal Lands) will no longer be used for a future airport. To determine the future use of these lands, the Federal Government is seeking input from key stakeholders, the public and First Nations Community.

Federal Key Themes for discussion through its consultations include:

- Expansion of the Rouge National Urban Park;
- Other Conservation and Environmental Protection;
- Other Public Parks and Recreational Spaces;
- Agricultural Use;
- Residential development;
- Commercial development;
- Industrial Development; and
- Transportation.

To provide input to the Federal Government on the Key Themes, the City of Pickering initiated a comprehensive Land Use Review and Economic Analysis to determine Pickering's vision for the future use of the Pickering Federal Lands.

SGL Planning & Design Inc. and its consulting team consisting of Parcel Economics and Dillion Consulting Limited were retained by the City of Pickering to undertake a comprehensive land use review and economic analysis for the future use of the Pickering Federal Lands. This Recommendation Report presents the findings of that work. To respond to the Federal Key Themes, three land use options were prepared. These three land use options explored different balances between the Federal Key Themes.

Extensive and comprehensive engagement was conducted on the land use options. Several focus groups were conducted including Members of Council, City and Regional staff, Durham Agricultural Advisory Committee (DAAC), Lakeridge Health, Landowners

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Group, Mayors from surrounding municipalities, the local MP as well as members of the public at the Public Open House.

The Staff Recommended Land Use Plan balances the Federal Key Themes to develop a long-term plan for the Pickering Federal Lands. Recommendations include:

- identify, stake and transfer all significant natural heritage features to the Rouge National Urban Park;
- create a vibrant agricultural system where farmers are incentivized to invest in farm improvements. These lands could be included in an expanded Rouge National Urban Park provided the Federal Government provides long-term leases and incentives for farmers to invest in the lands;
- develop an economic corridor along Highway 7;
- transfer 20 hectares near Green River to the City of Pickering for an expansion to the District Park;
- transfer 10 hectares in the Hamlet of Claremont to the City of Pickering for park purposes;
- transfer Don Beer Memorial Park in the Hamlet of Brougham to the City of Pickering;
- other existing recreational uses given the opportunity to acquire long-term leases;
- conserve and actively reuse existing cultural heritage buildings;
- further investigate the presence of significant archaeological sites;
- Transport Canada to work with the Provincial Government to revoke O.Reg 102/72;
- revitalize the Hamlet of Brougham with lessees in the Hamlet provided the opportunity to either purchase their leased properties or enter into long-term leases;
- Transport Canada to upgrade and improve existing roads and construct Sideline 20, 22 and 26 realignments and accommodate widening of Highway 7; and
- Transport Canada to work with Durham Region to coordinate water and wastewater servicing capacity and requirements for the economic corridor.

1 Introduction



In 1972, approximately 7,500 hectares of land was expropriated by the Federal Government for the development of a future airport. In 2015 and 2017, approximately 4,000 hectares of the expropriated land was transferred to Parks Canada to further expand the adjacent Rouge National Urban Park. The Federal Government currently retains about 3,700 hectares of land (outlined by the red line on **Figure 1**) which was intended for an airport and is currently leased for agricultural, residential and commercial uses.

In January 2025, the Federal Government announced that the expropriated lands in Pickering (the “**Pickering Federal Lands**”) will no longer be used for a future airport. To determine the future use of these lands, the Federal Government is seeking input from all levels of government, the local community and the public. A decision by the Government of Canada on the future uses of the Pickering Federal Lands will be informed by First Nations consultations, engagement with key stakeholders, public consultations and an analysis of potential land use options and priorities.

Transport Canada is working with several federal agencies such as Parks Canada, Public Services and Procurement Canada, Canada Lands Company, and Housing, Infrastructure and Communities Canada to explore future uses for the Pickering Federal Lands. Federal Key Themes for the discussion of potential future uses on the Pickering Federal Lands help identify federal projects or initiatives, in addition to a transfer of lands to Parks Canada for the expansion of Rouge National Urban Park. The lands could also be considered for agricultural uses, parks and recreation spaces and other conservation uses to ensure protection of the natural environment. The Canada Lands Company is assisting Transport Canada to reintegrate former Government of Canada properties into local communities while ensuring their long-term sustainability and commercial viability. Additionally, the Alto High-Speed Rail is undertaking a multi-phased public engagement process for development of a high-speed rail line. These lands are proposed by the City of Pickering for a future stop.

Federal Key Themes for discussion through its consultations include:

- Expansion of the Rouge National Urban Park;
- Other Conservation and Environmental Protection;
- Other Public Parks and Recreational Spaces;
- Agricultural Use;
- Residential development;
- Commercial development;
- Industrial Development; and
- Transportation.

To provide input to the Federal Government on the Key Themes, the City of Pickering is conducting a comprehensive Land Use Review and Economic Analysis to determine Pickering’s vision for the future use of the Pickering Federal Lands.

SGL Planning & Design Inc. (SGL) and its consulting team consisting of Parcel Economics (Parcel) and Dillion Consulting Limited (Dillion) were retained by the City of Pickering to undertake a comprehensive land use review and economic analysis for the future use of the Pickering Federal Lands.

As shown on **Figure 1**, about 40% of the Pickering Federal Lands are within the Provincial Greenbelt Plan Area/Oak Ridges Moraine Conservation Plan Area. The Pickering Federal Lands border the Rouge National Urban Park to the north and west and the Pickering Innovation Corridor as well as a Pickering district park to the south along Highway 407. The Hamlet of Brougham and a small portion of the Hamlet of Claremont are located within the Pickering Federal Lands.

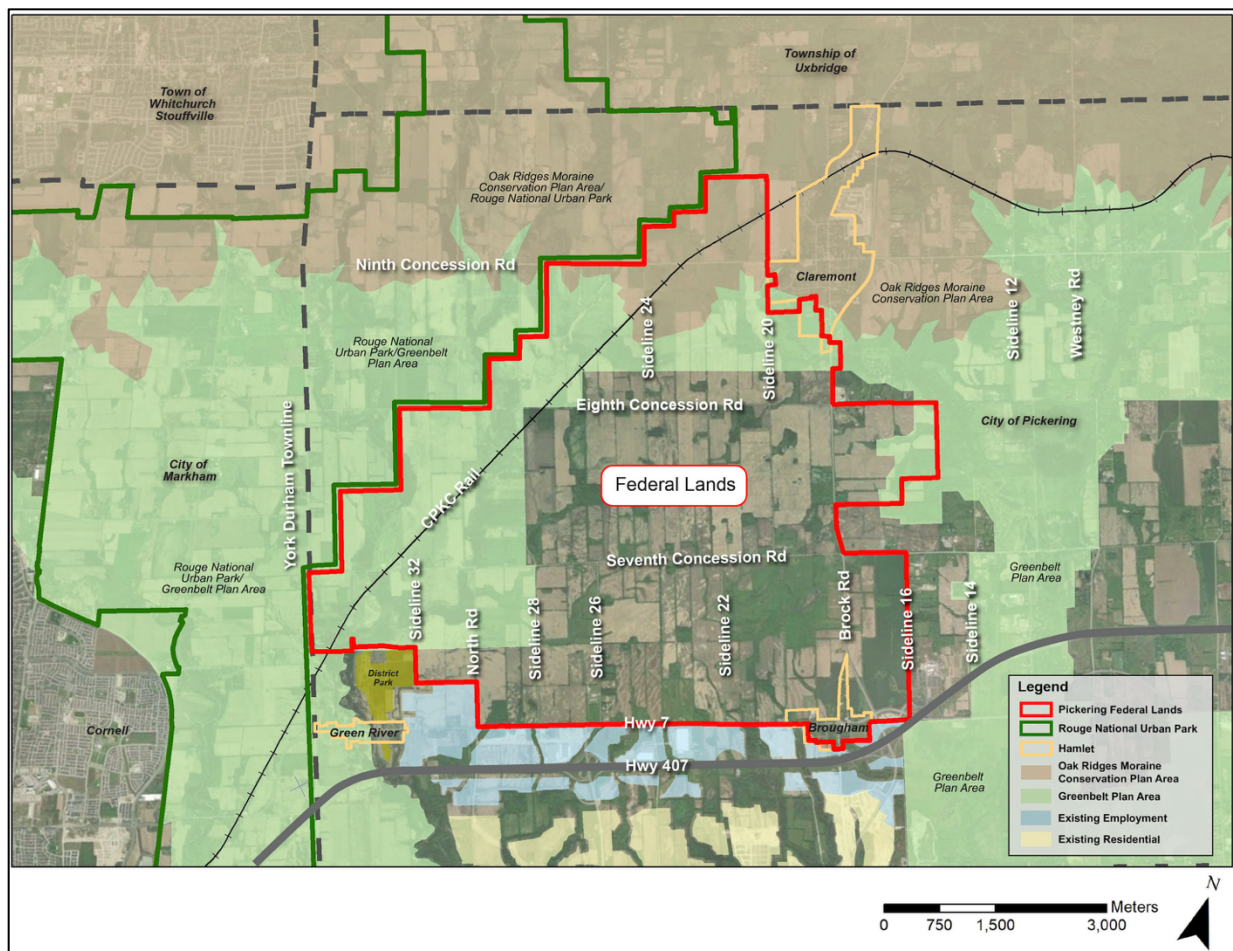


Figure 1: Pickering Federal Lands Context Map

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The Pickering Federal Lands primarily contain agricultural fields, natural features and some rural residential uses. As well, commercial, residential, employment and community uses are located in the Hamlets of Brougham and Claremont. The Pickering Federal Lands also contain existing active recreational uses such as the Pickering Glen Golf Club at Seventh Concession Road and Sideline 32, the Oshawa Competition Motorcycle Club at Eighth Concession Road and Brock Road, as well as cemeteries along Highway 7 (Green River Baptist Cemetery), Sideline 20 (Sharrard Cemetery), and Eighth Concession Road (Mach-Pelah Cemetery). The CPKC Rail line also runs through the Pickering Federal Lands diagonally from York Durham Townline through Claremont as shown on **Figure 1**.

1.1 Purpose of this Report

The purpose of this Pickering Federal Lands Land Use Review & Economic Analysis (“Report”) is to inform Pickering Council’s strategic direction and advocacy efforts as part of the Federal Government’s consultation on the future use of the Pickering Federal Lands. This Report provides a background overview and site analysis of the Pickering Federal Lands and its surrounding area, describes three alternative land use options, and provides recommendations to the Federal government on the future use of the Pickering Federal Lands.

1.2 Pickering Federal Airport Lands Location

The Pickering Federal Lands are located in the northwest part of Pickering, just north of Highway 407 and the Seaton Community as shown on **Figure 1**. The Pickering Federal Lands are generally bound by Ninth Concession Road and the Rouge National Urban Park to the north, Sideline 16 to the east, Highway 7 to the south, and York Durham Townline and the Rouge National Urban Park to the west. The Pickering Federal Lands are approximately 3,700 hectares with 1,200 hectares of that land area within the Provincial Greenbelt Plan Area and 300 hectares of land within the Provincial Oak Ridges Moraine Conservation Plan Area.

2 Background and Site Analysis



The following section provides a summary of the applicable land use planning policy framework, a summary of the current and future demographic and economic trends, and a summary of the existing servicing and transportation infrastructure for the Pickering Federal Lands. This background and site analysis helped inform the development of the three land use options.

2.1 Planning Policy Framework

This section reviews the applicable Provincial, Regional, and local Municipal planning policy framework including permitted use to help inform the proposed land uses in the three land use options. Although this Report takes the applicable planning policies into consideration, the Federal Government could choose to supersede these policies if the Pickering Federal Lands remain Crown Lands.

2.1.1 Oak Ridges Moraine Conservation Plan (ORMCP) (2017)

Approximately 300 hectares of the Pickering Federal Lands are within the ORMCP within the Countryside Area and the Natural Linkage Area designations as shown on **Figure 2**. The ORMCP is an ecologically based plan that provides land use and resource management direction to protect its ecological and hydrological features and functions. The Pickering Federal Lands include two ORMCP designations - Natural Linkage Area and Countryside Area.

The purpose of Natural Linkage Areas is to improve or restore, where possible the ecological integrity of the ORMCP area as well as linkages within the ORMCP area (ORMCP 12(1)). Permitted uses within the Natural Linkage Area include but are not limited to agricultural, infrastructure, home industry, low-intensity recreation, and conservation uses (ORMCP 12(3)).

The purpose of Countryside Areas is to encourage agricultural and other rural uses (ORMCP 13(1)). Permitted uses within the Countryside Areas include but are not limited to agricultural; infrastructure; home industry; low-intensity recreation; small-scale commercial, industrial and institutional uses complementary to permitted primary uses, and conservation uses (ORMCP 13(3)).

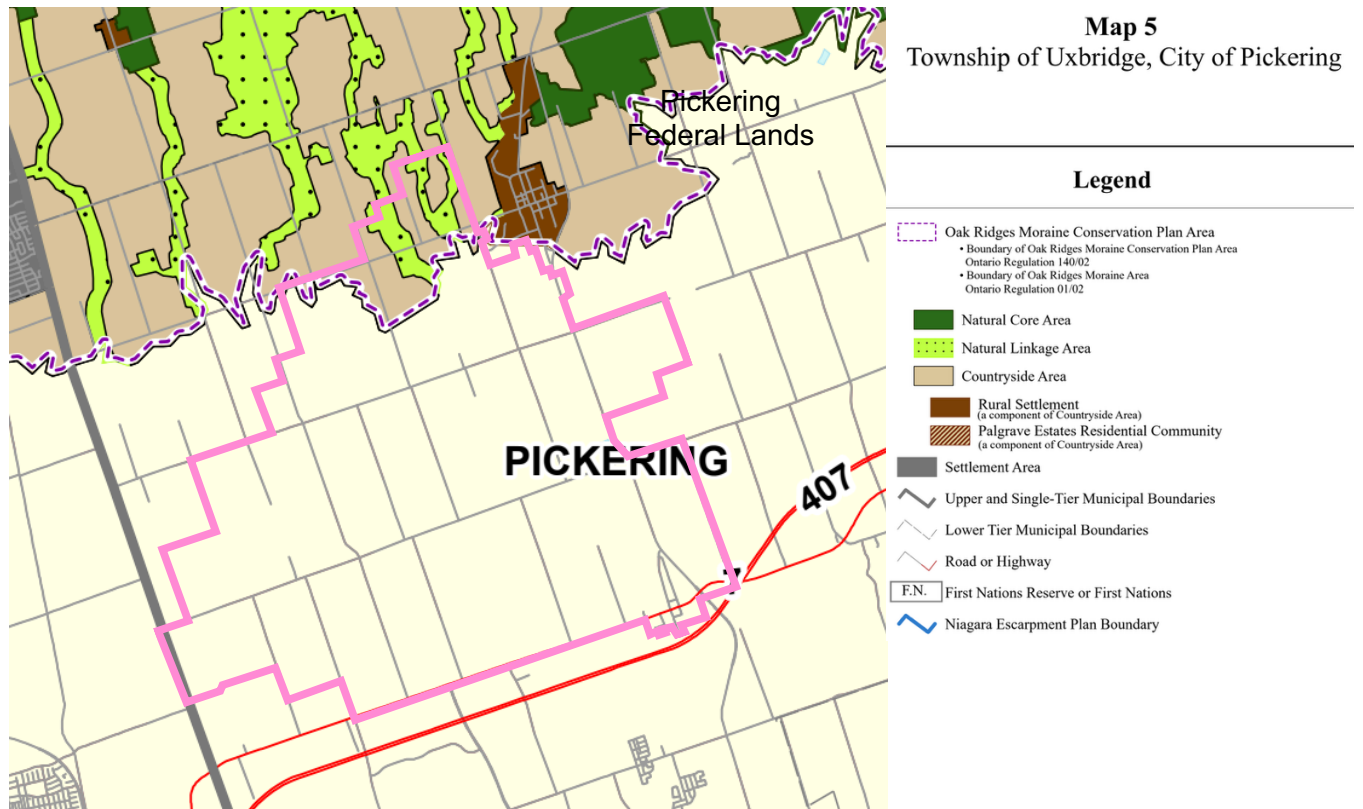


Figure 2: Oak Ridges Moraine Conservation Plan Land Use Designation Map – Map 5 (Township of Uxbridge, City of Pickering)

2.1.2 Greenbelt Plan (2017)

Approximately 1,260 hectares of the Pickering Federal Lands are within the Greenbelt Plan Area in the Protected Countryside and the Natural Heritage System as shown on **Figure 3**.

The Protected Countryside is intended to support a range of recreational, tourism, institutional, and resource-based commercial/industrial uses (GP 3.1.4.1). Farm practices and a full range of agricultural uses, agriculture-related uses and on-farm diversified uses are permitted (GP 3.1.4.2).

The entirety of the lands within the Protected Countryside are also within the Natural Heritage System. Key natural heritage and key hydrologic features are to be protected including any associated vegetation protection zones (GP 3.2.2).

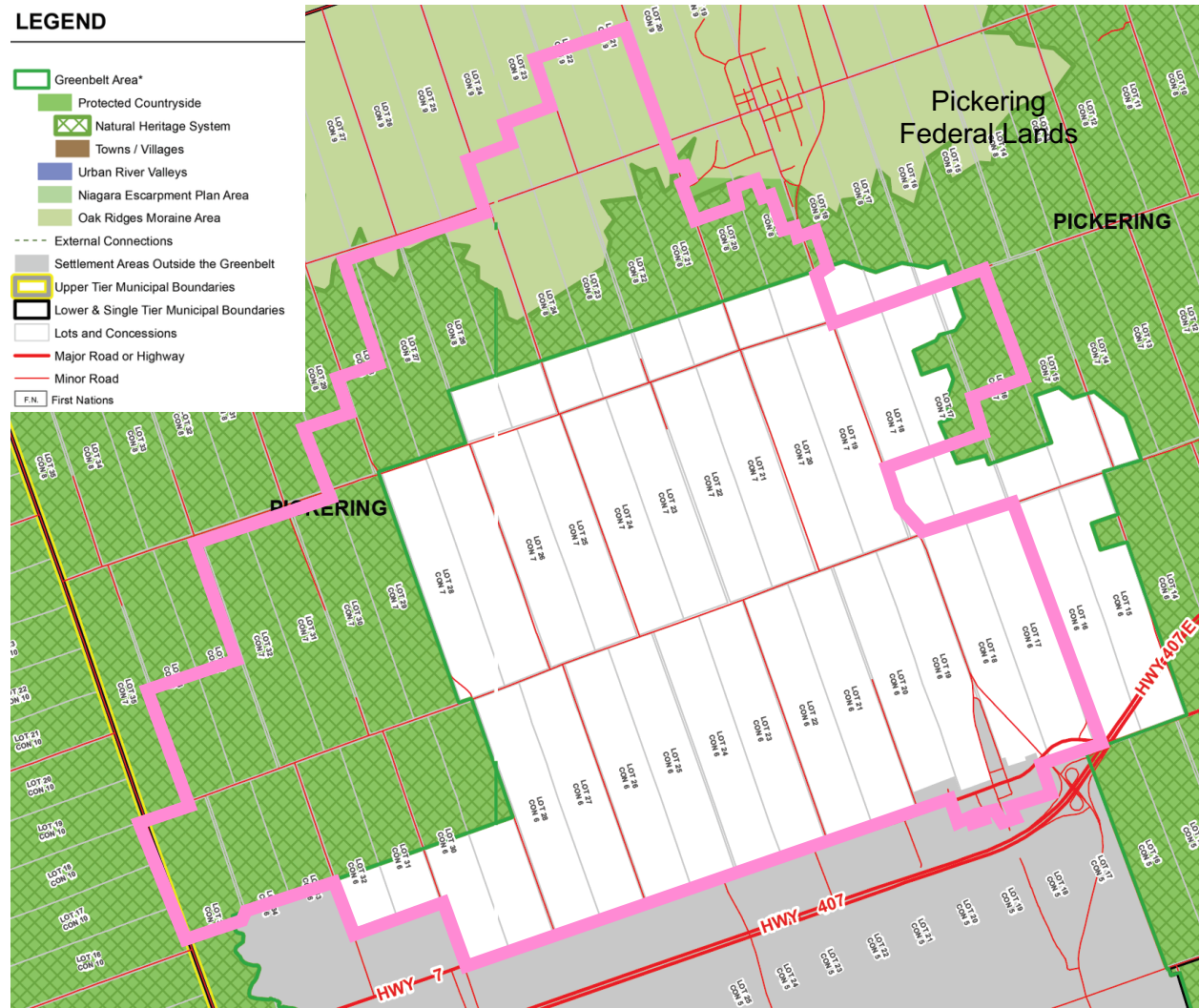


Figure 3: Greenbelt Plan Map Extract

2.1.3 Municipal Zoning Order O. Reg. 102/72

O. Reg. 102/72 is a regulation passed by the Minister of Municipal Housing and Affairs under the Planning Act that establishes provincial zoning control to restrict development on the Pickering Federal Lands and overrides any municipal zoning by-laws.

O. Reg. 102/72 reserves the entirety of the Pickering Federal Lands for the development of a future airport. All buildings or structures are prohibited on the Pickering Federal Lands with the exception of agricultural uses and buildings/structures accessory to it including one single detached dwelling in connection to the agricultural operations.

Although the Federal Government announced in January 2025 that the Pickering Federal Lands would no longer be used for a future airport, this regulation is currently still in effect and prevents development on the Pickering Federal Lands.

2.1.4 Regional Official Plan (Envision Durham)

Envision Durham was the Region of Durham’s Official Plan (ROP), which was adopted by Regional Council in May 2023, and approved by the Minister of Municipal Affairs and Housing in September 2024. As of January 1, 2025, the Region of Durham was defined by the Province as an “upper-tier municipality without planning responsibilities so Envision Durham is now part of the City of Pickering’s Official Plan.

Envision Durham was written prior to the Federal Government’s decision to no longer use the Pickering Federal Lands for a future airport so policies pertaining to the Pickering Federal Lands protect for a future airport in Pickering.

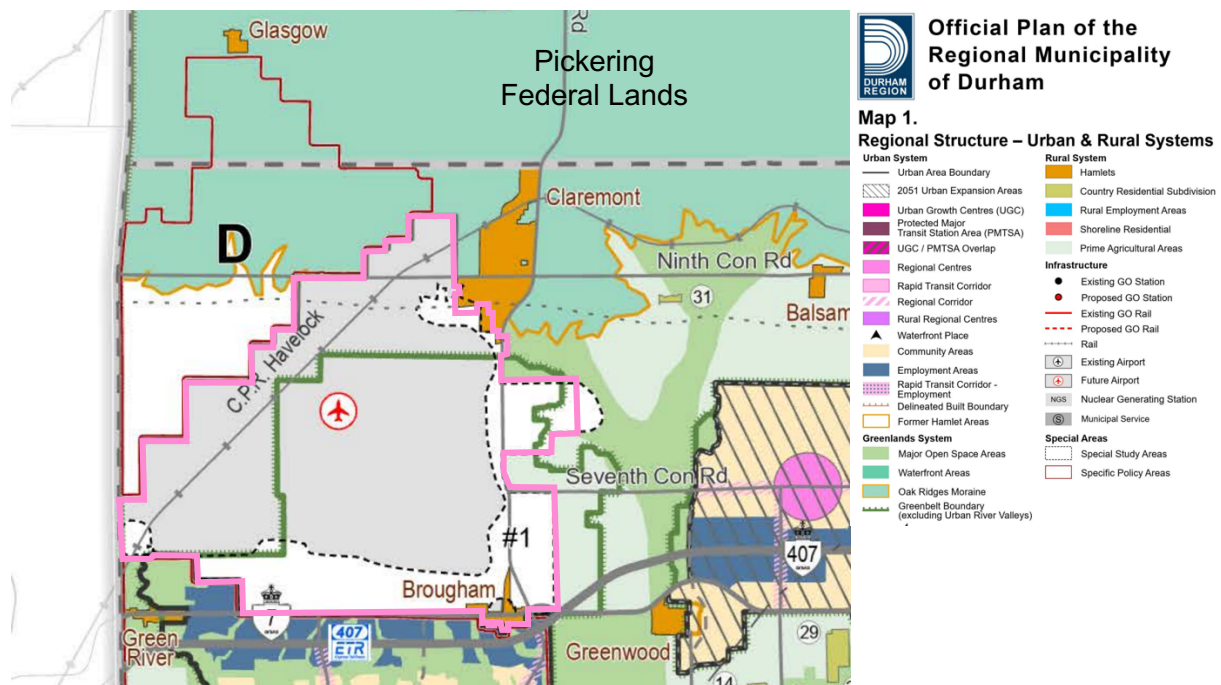


Figure 4: Region of Durham Official Plan – Map 1 Regional Structure

Envision Durham identifies the Pickering Federal Lands within Special Study Area #1 as shown on **Figure 4** and requires further analysis for the development of a future airport to align with federal, provincial, regional and local municipal plans and servicing requirements (ROP 9.1). It is noted that Special Study Area #1 has protected for a future airport since the Region’s first Official Plan so any proposed or recommended land uses on the Pickering Federal Lands are not contemplated in Envision Durham. Policy 5.5.30 of the ROP states that should the Pickering Federal Lands no longer be

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required for major facilities (an airport), additional uses may be permitted subject to planning studies and land use compatibility.

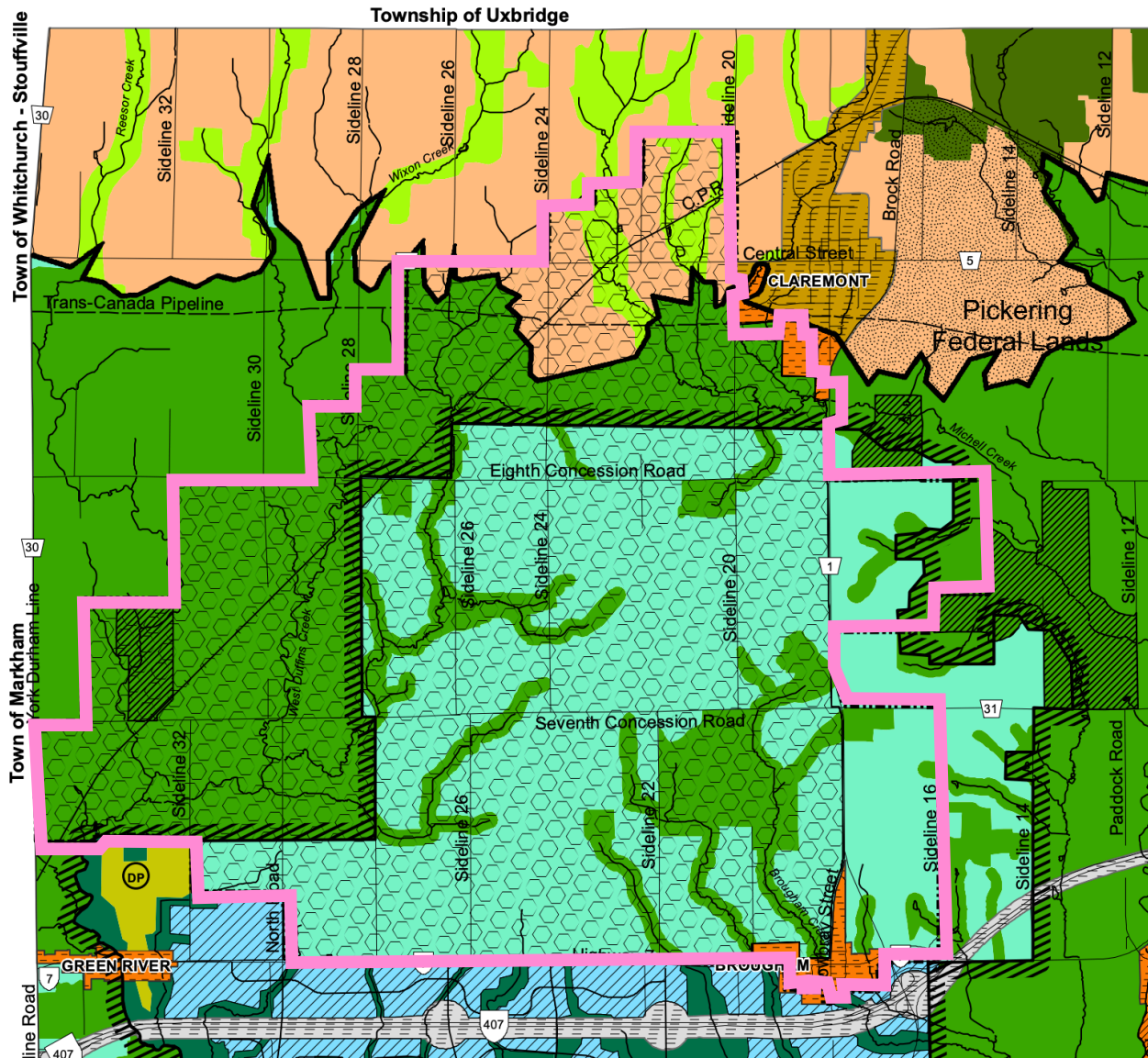
The Pickering Federal Lands are also directly adjacent to Specific Policy Area D – Rouge National Urban Park (RNUP), west of the Pickering Federal Lands as shown on **Figure 4**. Specific Policy Area D encourages adjacent land uses (such as the Pickering Federal Lands) to have consideration for connections to the active transportation network and compatibility with the RNUP Management Plan (ROP 9.2.11).

2.1.5 Pickering Official Plan (Edition 9)

In the Pickering Official Plan (POP), the following land use designations, as shown on **Figure 5**, apply in the Pickering Federal Lands:

- Natural Areas including the Greenbelt Natural Heritage System;
- Active Recreational Areas;
- Rural Hamlets;
- Proposed Airport Site;
- Prime Agricultural Areas;
- Oak Ridges Moraine Natural Linkage Areas; and
- Oak Ridges Moraine Countryside Areas.

The Proposed Airport Site designation is an overlay designation that applies to the Pickering Federal Lands west of Brock Road as shown on **Figure 5**. Policy 2.17 of the POP applies to the Proposed Airport Site designation and only permits open space and agricultural uses until a decision is made regarding a future airport. Since a decision was made in January 2025, this policy is no longer relevant.



Schedule I to the
Pickering Official Plan
 Edition 9
 Sheet 2 of 3

Open Space System

- Seaton Natural Heritage System
- Natural Areas
- Active Recreational Areas
- Oak Ridges Moraine Natural Linkage Areas
- Hamlet Heritage Open Space
- Oak Ridges Moraine Natural Core Areas

Rural Settlements

- Rural Clusters
- Rural Hamlets
- Oak Ridges Moraine Rural Hamlets

Land Use Structure

- Urban Residential Areas
 - Low Density Areas
 - Medium Density Areas
- Mixed Use Areas
 - Local Nodes
 - Community Nodes
 - Mixed Corridors
- Employment Areas
 - Prestige Employment
- Seaton Symbols
 - District Park (DP)
 - Community Park (CP)
 - High School (HS)

Freeways and Major Utilities

- Controlled Access Areas

Other Designations

- Proposed Airport Site
- Prime Agricultural Areas
- Prime Agricultural Areas On The Oak Ridges Moraine
- Oak Ridges Moraine Countryside Areas
- Rural Study Area
- Federal Lands
- Oak Ridges Moraine Boundary
- Greenbelt Boundary

Figure 5: Pickering Official Plan Ed.9 – Schedule I, Sheet 2 of 3 (Land Use Structure)

Active Recreational Areas

The existing Pickering Glen Golf Club along Seventh Concession Road just west of Sideline 32 is designated as Active Recreational Areas within the Greenbelt Plan.

Rural Hamlets

Two rural hamlets, namely, Brougham in the southeast and a small portion of Claremont in the northeast are located within the Pickering Federal Lands. Rural Hamlets are historic settlements that focus on limited rural growth and development within the existing hamlet boundary and serve as the service and social centres of the surrounding rural area. The Rural Hamlets designation permits residential, employment, commercial, community, cultural, and recreational uses (POP 3.10 – Table 10).

Brougham

Figure 6 identifies the land uses in Brougham. As shown, most of Brougham is located within the Pickering Federal Lands. (POP 13.6).

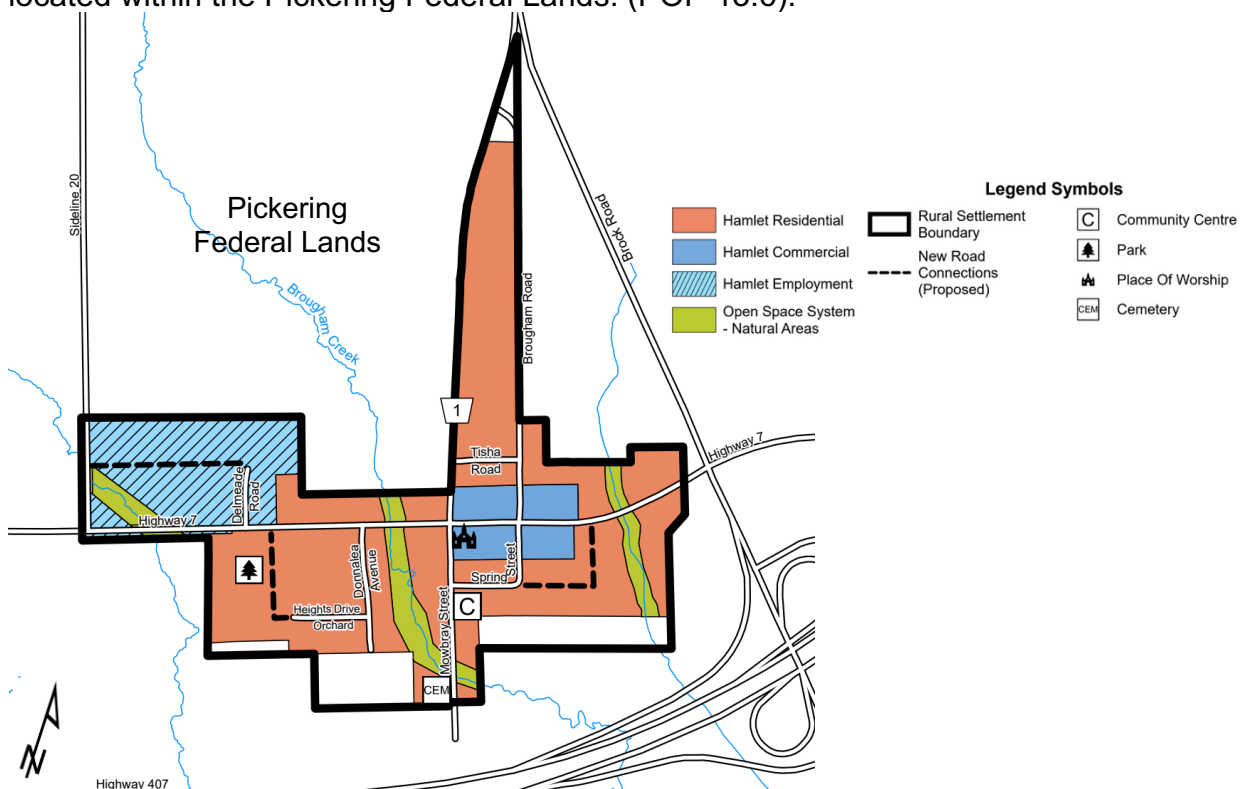


Figure 6: Pickering Official Plan Schedule IV-4: Brougham

Within Brougham, the Pickering Federal Lands are designated Hamlet Residential, Hamlet Commercial, Hamlet Employment, and Open Space System – Natural Areas. Permitted uses for each designation include:

- **Hamlet Residential** – residential, home occupation, community, cultural, recreation, limited retail office, business, personal service, and employment uses.
- **Hamlet Commercial** – retail, office, business, personal service and employment, residential, home occupation, community, cultural, and recreation uses.
- **Hamlet Employment** – manufacturing, research and development, warehousing, office, and automotive uses.
- **Open Space System – Natural Areas** – conservation, environmental protection, and passive recreation uses.

Claremont

A portion of Claremont is also located within the Pickering Federal Lands as shown on **Figure 7**.

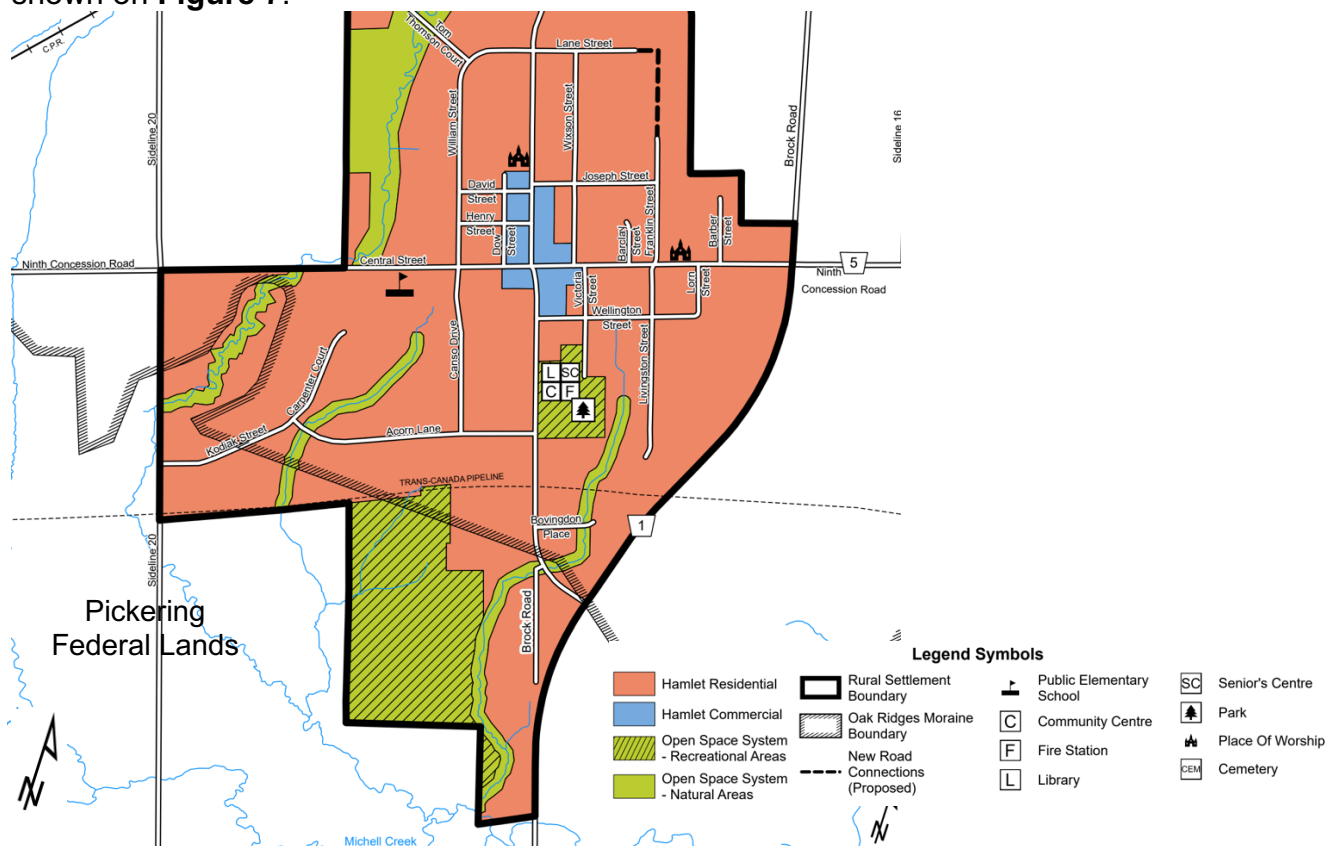


Figure 7: Pickering Official Plan Schedule IV-10: Claremont-South Section

Within Claremont, the Pickering Federal Lands are within the Oak Ridges Moraine Conservation Plan Area boundary and are designated Hamlet Residential, Open Space System – Recreational Areas, and Open Space System – Natural Areas in the Pickering Official Plan. Permitted uses for each designation include:

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- **Hamlet Residential** – residential, home occupation, community, cultural, recreation, limited retail office, business, personal service and employment uses.
- **Open Space System – Recreational Areas** – conservation, environmental protection, active and passive recreation, and community and cultural uses.
- **Open Space System – Natural Areas** – conservation, environmental protection, and passive recreation uses.

Prime Agricultural Areas

Most of the Pickering Federal Lands outside of the Oak Ridges Moraine Conservation Plan Area and the Greenbelt Plan Area are designated Prime Agricultural Areas as shown on **Figure 5**.

The Prime Agricultural Areas designation permits primary agricultural uses (i.e., growing crops and raising livestock), agricultural-related uses, on-farm diversified uses, and non-agricultural uses (i.e., conservation and mineral aggregate extraction) (POP 3.11 – Table 11).

2.1.6 City of Pickering Zoning By-Law 8149/24

The City of Pickering Zoning By-law (ZBL) 8149/24 is a municipal by-law that regulates the type of land uses and activities that may occur on a property as well as the performance standards of buildings or structures (i.e., height, location and massing). The ZBL implements the policies of the POP by providing more specific permitted land uses and requirements for buildings or structures on a lot.

Most of the Pickering Federal Lands are zoned Agriculture in the ZBL as shown on **Figure 8**. The Agriculture zone generally permits a variety of agricultural uses, agricultural-related uses, on-farm diversified uses, as well as community uses.

The north portion of the Pickering Federal Lands within the Oak Ridges Moraines Conservation Plan Area are zoned Oak Ridges Moraine – Agricultural (ORMA) and Oak Ridges Moraine – Environmental Protection (ORMEP). The ORMA zone permits agriculture, agricultural-related uses, on-farm diversified uses, and conservation uses. The ORMEP zone only permits conservation uses.

The portion of the Pickering Federal Lands within the hamlet of Brougham are subject to Exception Zone 329 which permits detached dwellings as well as commercial, office and retail uses with site-specific zone provisions for lot area, frontage, side yard setback, amongst others.

for housing, employment, and supporting infrastructure in both the City of Pickering and Durham Region.

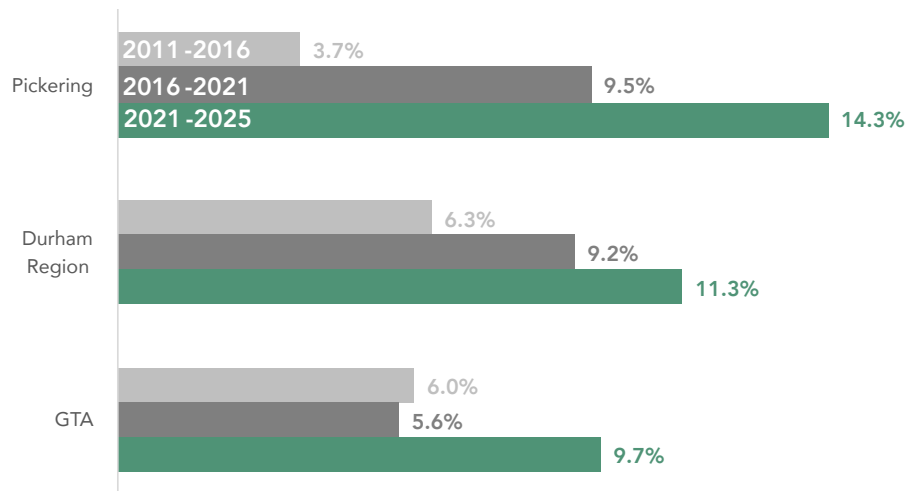


Figure 9: Population Growth Rates, Pickering, Durham Region & GTA (2011 to 2025)
 Source: Parcel, based on Statistics Canada population estimates. Population adjusted for undercount.

2.2.2 Industrial / Employment Areas

Based on the Provincial Planning Statement, Employment Areas means those areas designated in an official plan for clusters of business and economic activities including manufacturing, research and development in connection with manufacturing, warehousing, goods movement, associated retail and office, and ancillary facilities. However, due to recent changes to the PPS, they do not include institutional and commercial uses, including retail and office uses not associated with the primary employment noted listed above.

2.2.3 Industrial Inventory

There are 541 hectares (58.2 million square feet) of employment/industrial space in Durham Region, 97 hectares (10.4 million square feet) of which are in Pickering as shown on **Figure 10**. Durham Region industrial space represents approximately 6% of industrial inventory across the GTA.



Figure 10: Industrial Space Inventory, GTA (Q1 2026)
 Source: Parcel, based on CoStar Realty Services.

Construction of industrial space in Durham Region has increased significantly since 2020. Prior to 2020, Durham Region accounted for just 3% of new industrial space delivery in the GTA. Since 2020, that share has grown to 19% as shown on **Figure 11**. This significant increase depicts that there is growing demand for industrial lands in Durham Region linked to demand in the GTA more broadly.

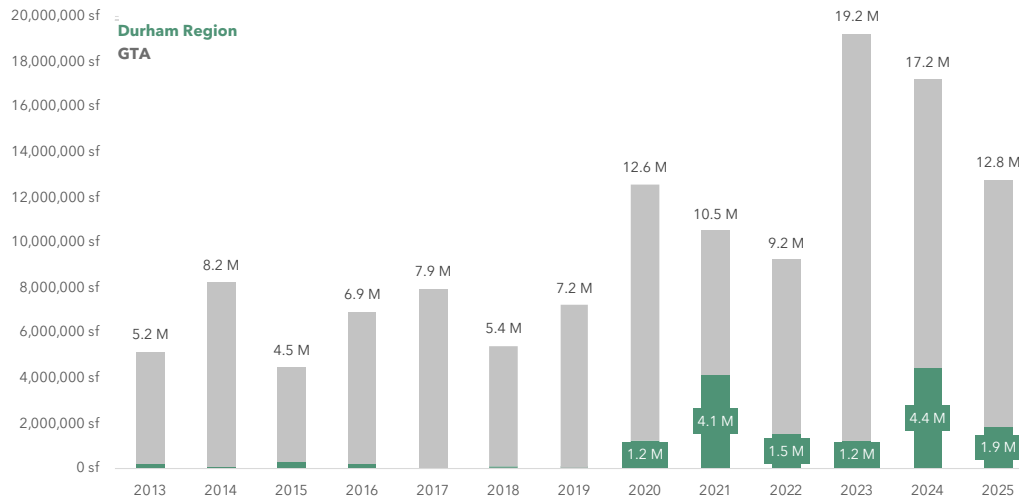


Figure 11: Industrial New Space Delivery, Durham Region & GTA (2013-2025)

Source: Parcel, based on CoStar Realty Services. Space delivery for 2026 was excluded due to limited data availability.

Just south of the Pickering Federal Lands is the Pickering Innovation Corridor as shown on **Figure 12**. The Innovation Corridor is approximately 324 hectares (801 acres) and the lands are reserved for high employment generating uses such as light manufacturing, light service industries, research and development industries, warehousing, offices, restaurants, and more. The Innovation Corridor is expected to introduce 24,000 jobs and recent employment development within the Innovation Corridor includes high employment generating uses such as Kubota Canada’s Head Office, Smart Centres, and FGF Brands.

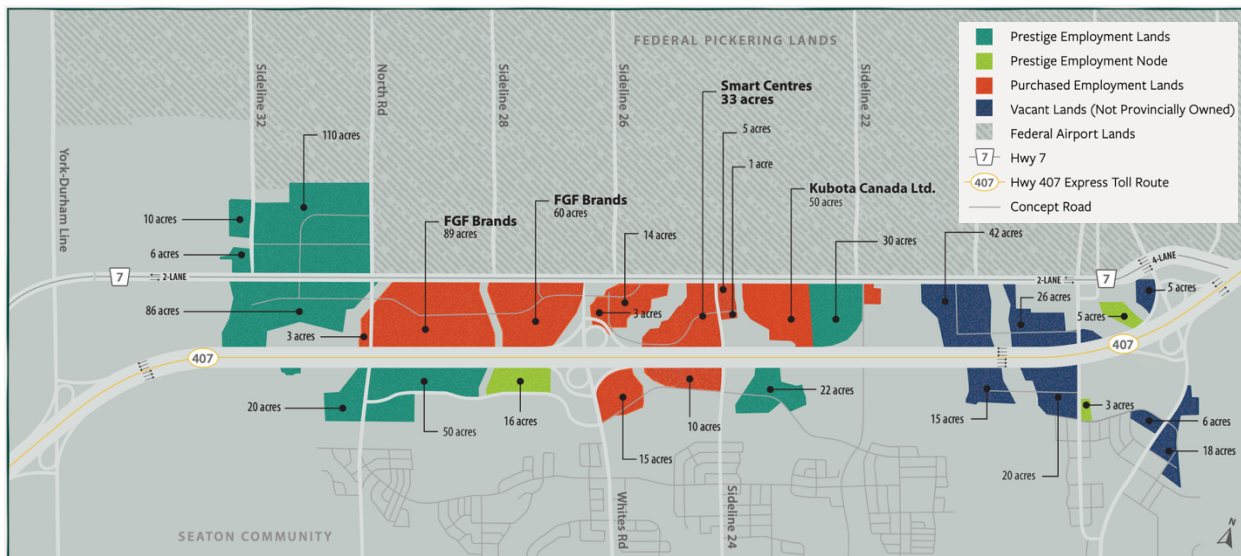


Figure 12: Pickering Innovation Corridor

In addition to this existing space, there are 462 hectares (49.7 million square feet) of industrial space proposed in the GTA. Approximately 9% of proposed space is in Durham Region (39 hectares or 4.2 million square feet). There remains strong interest in industrial space in Durham Region and the City of Pickering.

2.2.4 Office & Retail Commercial Inventory

Pickering and Durham Region represent a relatively small share of existing and proposed office space in the GTA. Standalone office uses are likely not viable on the Pickering Federal Lands due to a combination of location, marketability, and a large supply of vacant office space and office sites in the GTA east and Durham Region, however, there may be office components of large industrial operations.

Retail commercial inventory is typically driven by nearby residential population. Given a lack of nearby supporting population base, demand for retail/service commercial space will likely be limited to facilities supporting the local employment base.

2.2.5 Factors Impacting Employment Lands

Industries that typically locate on employment lands include manufacturing, transportation /warehousing (including warehousing and storage and data centres), wholesale trade, and construction. These industries typically require large greenfield parcels with convenient access to highway transportation.

Output from warehousing and storage, wholesale trade, and construction has more than doubled since the late 1990s while output from manufacturing has decreased as shown on **Figure 13**. Most employment lands industries have grown faster than service-producing industries in Ontario.

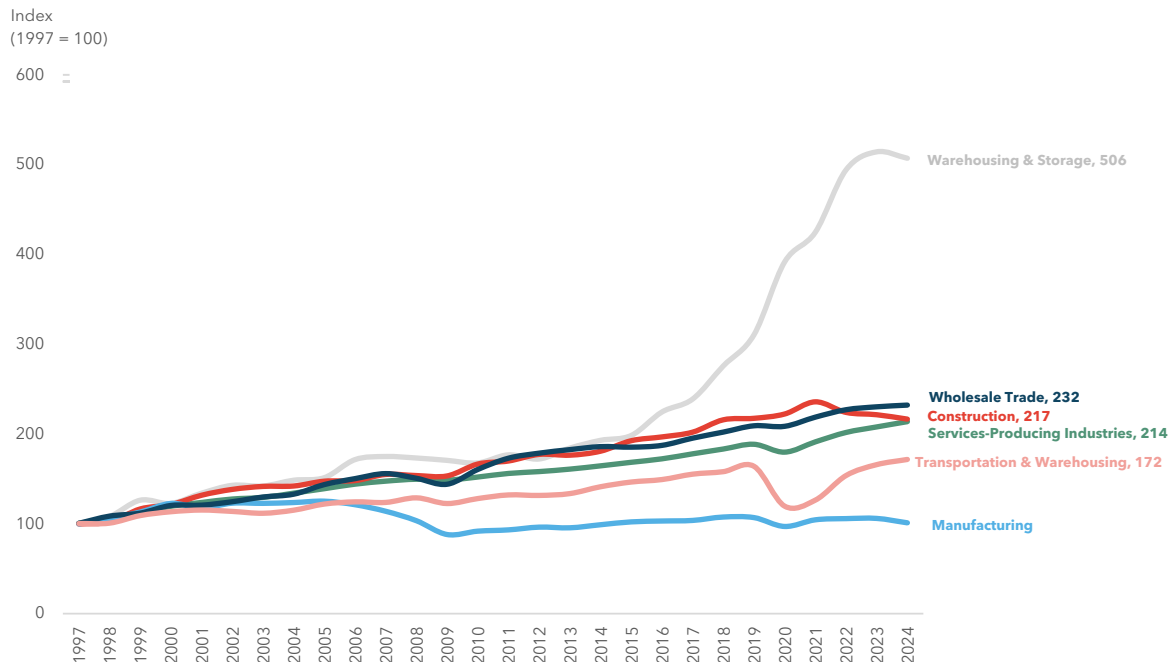
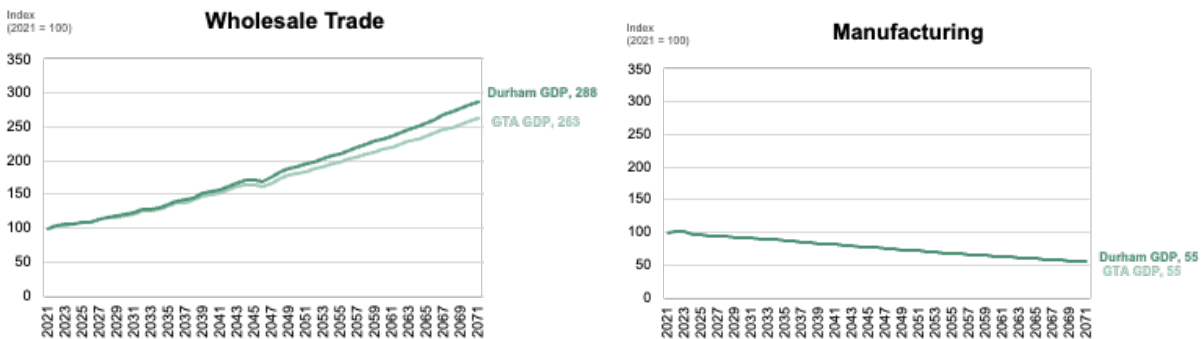


Figure 13: Index of GDP at Basic Prices by Sector, Ontario (1997-2024)
 Source: Parcel, based on Statistics Canada Table 36-10-0711-01

These trends are projected to continue to 2071 in both Durham Region and the GTA as shown on **Figure 14**. Notably, GDP growth in Durham Region is anticipated to outpace GDP growth in the GTA reflecting a growing importance for Durham Region to provide appropriate employment lands. Therefore, it will be important for Durham Region and Pickering to have a sufficient supply of shovel ready industrial lands that are available to accommodate growth and provide sufficient market choice.



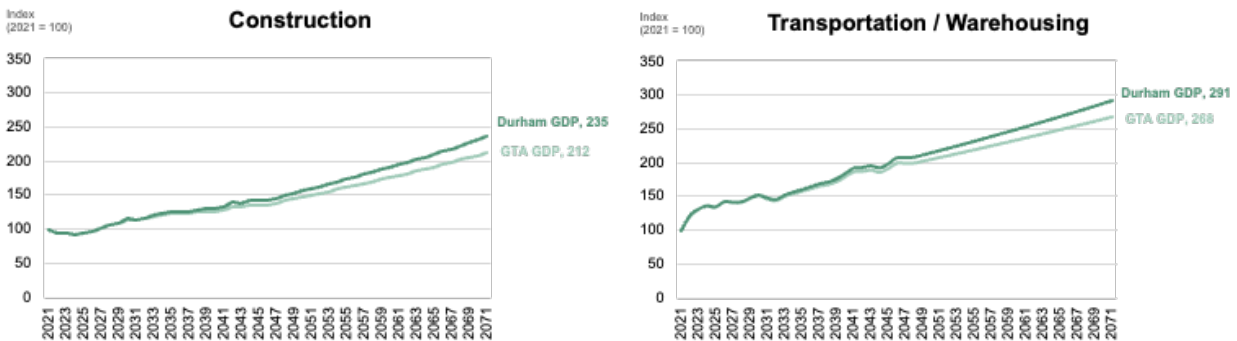


Figure 14: Index of GDP Projects by Sector, Durham Region & GTA (2021 to 2071)
 Source: Parcel, based on metroeconomics projections.

2.2.6 Demands for Employment Lands

Envision Durham estimates the need for an additional 1,171 gross hectares of employment lands in Durham Region to 2051. Much of this demand is anticipated to be met by future employment areas within Northeast Pickering as well as surrounding municipalities like Clarington and Oshawa.

Beyond 2051, Parcel forecast a demand for additional employment lands to 2071. These forecasts anticipate that gross domestic product (“GDP”) for employment land related industries in Durham is projected to grow by \$4.0 billion between 2051 and 2071 as shown on **Figure 15**. This growth will require an additional 29.1 million square feet of employment lands between 2051 and 2071. Assuming 30% site coverage and an 80% net-to-gross ratio, this translates a need for approximately 1,127 gross hectares of employment lands between 2051 and 2071 across Durham Region.

GDP (\$millions)	2025	2051	2071
Construction	\$2,385	\$4,058	\$5,990
Manufacturing	\$2,372	\$1,757	\$1,356
Wholesale Trade	\$2,314	\$4,109	\$6,068
Transportation / Warehousing	\$1,037	\$1,677	\$2,241
Total	\$8,108	\$11,601	\$15,655

2025 Industrial Inventory (CoStar Q4)	58.2M SF
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GDP per square foot (2025)	\$139 PSF
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2051 to 2071 GDP Delta (\$ millions)	\$4,054
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2051 to 2071

Additional Industrial Inventory Required	29.1M SF
Site Coverage	30%
SF	97.0M SF
Net ha	901 ha
Net-to-Gross	80%
Gross ha	1,127 ha

Figure 15: Estimated Demand for Employment Lands based on \$GDP per Square Foot, Durham Region (2051 to 2071)

Source: Parcel, based on GDP projections prepared by metroeconomics and industrial inventory data from CoStar Realty Inc.

Given that the Pickering Innovation Corridor borders the Pickering Federal Lands, accommodating the long-term demand for high employment generating uses on the Pickering Federal Lands would be a logical extension of the emerging employment area along Highway 407 and Highway 7 corridor. The lands are contiguous and additional employment uses in this location can help create a stronger Pickering employment hub.

2.3 Servicing Overview

This section summarizes the existing water and wastewater conditions within and in proximity to the Pickering Federal Lands. In 2015, the Region of Durham entered into a front-ending agreement with the Seaton Landowners Group. Part of that agreement was to oversize their water and wastewater piping and some vertical assets (reservoirs and pumping stations) through the Seaton community to accommodate the future airport on the Pickering Federal Lands. The Seaton Landowners Group is responsible to fund a portion of the Federal oversizing costs related to water and sewer assets and the Region is committed to seek cost recovery from the current or future owners of the Pickering Federal Lands on behalf of the Seaton Landowners Group through the imposition of area-specific development charges or other financial instruments available.

2.3.1 Water

The responsibility for water supply in the City of Pickering lies with the Region of Durham. No local or trunk watermains are located within the Pickering Federal Lands, however, the Seaton Zone 5 Booster Pumping Station is located within the Pickering Federal Lands, just west of Sideline 26 (as shown on **Figure 16**). It is sized to service the Seaton Lands with a capacity of 200 litres per second. The Zone 5 Booster Pumping Station facility was designed to allow for expansion of the Zone 5 pumping capabilities and to accommodate a Zone 6 pumping station when a future airport was envisioned. A small communal water system owned by the Federal Government is also located in Brougham around the area of Donnalea Avenue and Orchard Heights Drive.

Water to the existing Seaton community south of the Pickering Federal Lands is provided by the Ajax Water Supply Plant located on the shores of Lake Ontario. The Ajax Water Supply Plant has a rated capacity of 163.5 million litres of water each day and the Region of Durham is currently undertaking a Class Environmental Assessment to expand its water supply due to increased system demand and community growth. The Region's capital forecast identifies 100 percent funding for the Ajax Water Supply Plant expansion by 2032, which is subject to review on an annual basis.

Water servicing planned for Pickering does not contemplate development beyond what was required for the future airport on the Pickering Federal Lands and some supporting employment uses. Any other development proposals would require further analysis and financial commitment and does not imply there is downstream system capacity available to service the Pickering Federal Lands. Timing for any development on the Pickering Federal Lands should be aligned with other infrastructure improvements including the Ajax Water Supply Plant expansion (detailed design expected to be completed by 2028), as well as utility companies (i.e. Enbridge and Elexicon Energy).

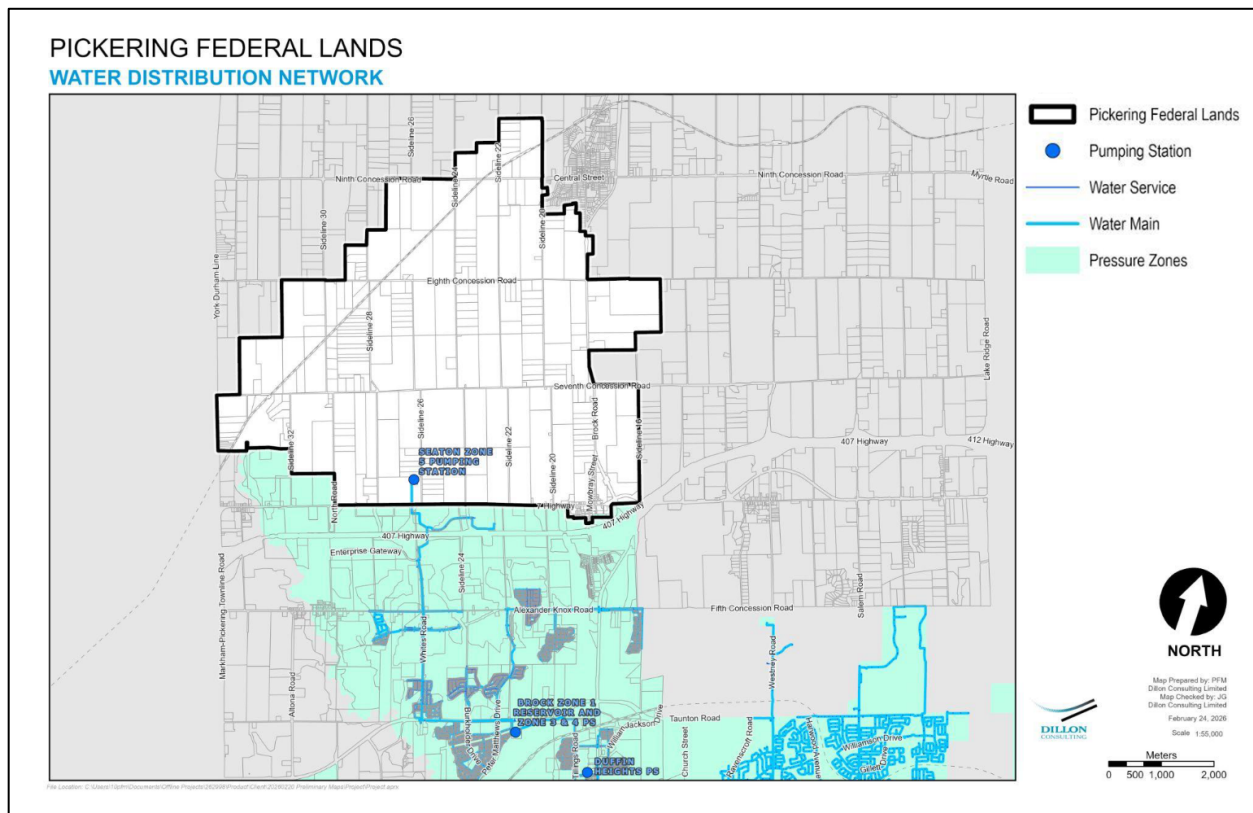


Figure 16: Water Distribution Network around the Pickering Federal Lands

2.3.2 Wastewater

The responsibility for wastewater servicing in the City of Pickering lies with the Region of Durham. No local or trunk sanitary mains are located within the Pickering Federal Lands, however, five trunk sanitary main connection points are planned along the south boundary of the Pickering Federal Lands from the Seaton community as shown on **Figure 17**. Between the planned connection points, a total allocated capacity of approximately 300 litres of wastewater per second is available for the Pickering Federal Lands and a remaining 1,700 litres per second is available for planned growth elsewhere.

Wastewater in the City of Pickering is conveyed to the Duffin Creek Water Pollution Control Plant in Pickering and discharged to Lake Ontario. The Duffin Creek Water Pollution Control Plant has a rated capacity of 630 million litres of wastewater each day and the Region of Durham is currently upgrading the Duffin Creek Water Pollution Control Plant to address future capacity limitation of the sewer discharge.

Wastewater servicing planned downstream does not contemplate development on the Pickering Federal Lands beyond what was required for the future airport and some supporting employment uses. Any greater development would require further analysis

and financial commitment and does not imply there is system capacity available to the south. Timing for any development on the Pickering Federal Lands should be aligned with other infrastructure improvements including the Duffin Creek Water Pollution Control Plan expansion.

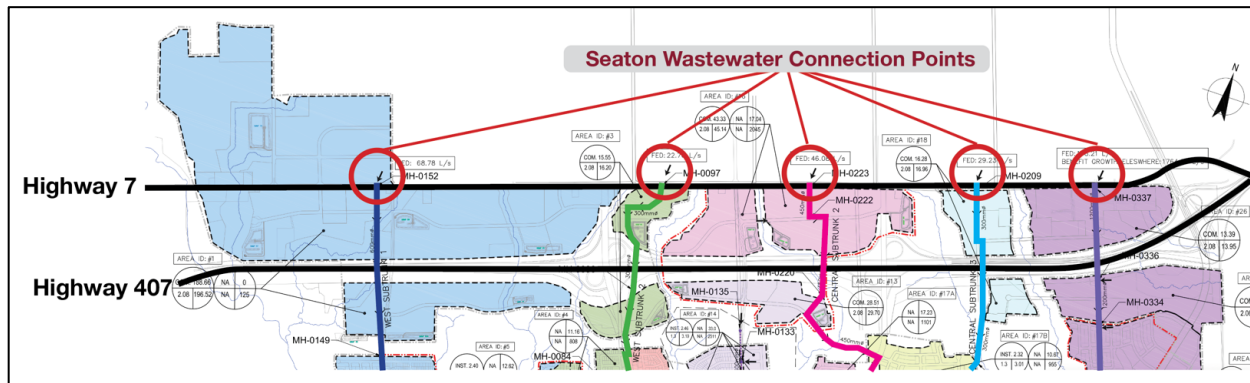


Figure 17: Wastewater Distribution Network and Connection Points in Seaton

2.4 Transportation Overview

This section summarizes the existing road network hierarchy, active transportation network, public transit, and rail network within the Pickering Federal Lands and its surrounding areas.

2.4.1 Road Infrastructure

Various existing and planned road infrastructure are within and adjacent to the Pickering Federal Lands as shown on **Figure 18**. Highway 407 has three existing interchanges (York Durham Line, Whites Road and Brock Road) and a fourth interchange planned (Peter Matthews Drive) just south of the Pickering Federal Lands.

Existing Type A Arterial roads include Brock Road (north/south) and Highway 7 (east/west) which borders the Pickering Federal Lands. A second north/south Type A Arterial (Whites Road) terminates at Highway 7 just south of the Pickering Federal Lands in the Seaton community.

Existing Type B Arterial roads include York-Durham Line (north/south) which borders the Pickering Federal Lands to the west and the Ninth Concession Road (east/west) at the north end of the Pickering Federal Lands. Sideline 26 (from Seventh Concession Road to Highway 7) and Seventh Concession Road were planned to be Type B Arterials, and Sideline 22 (from Seventh Concession Road to Highway 7) was planned to be a Type C Arterial, but were deferred “pending further study of matters related to the transportation services of Seaton and the Airport”.

Recommendation Report

City of Pickering

A Preliminary Design Study and Class Environmental Assessment (Class EA) to widen Highway 7 from 200 metres west of Ressor Road in Markham to approximately 200 metres west of Brock Road in Pickering was initiated in Fall 2025. The study is expected to be completed in Fall 2027, which will recommend a preferred preliminary design for widening the highway. The majority of Highway 7 within the Pickering Federal Lands is subject to this Environmental Assessment.

All other roads within the Pickering Federal Lands are unpaved local roads.

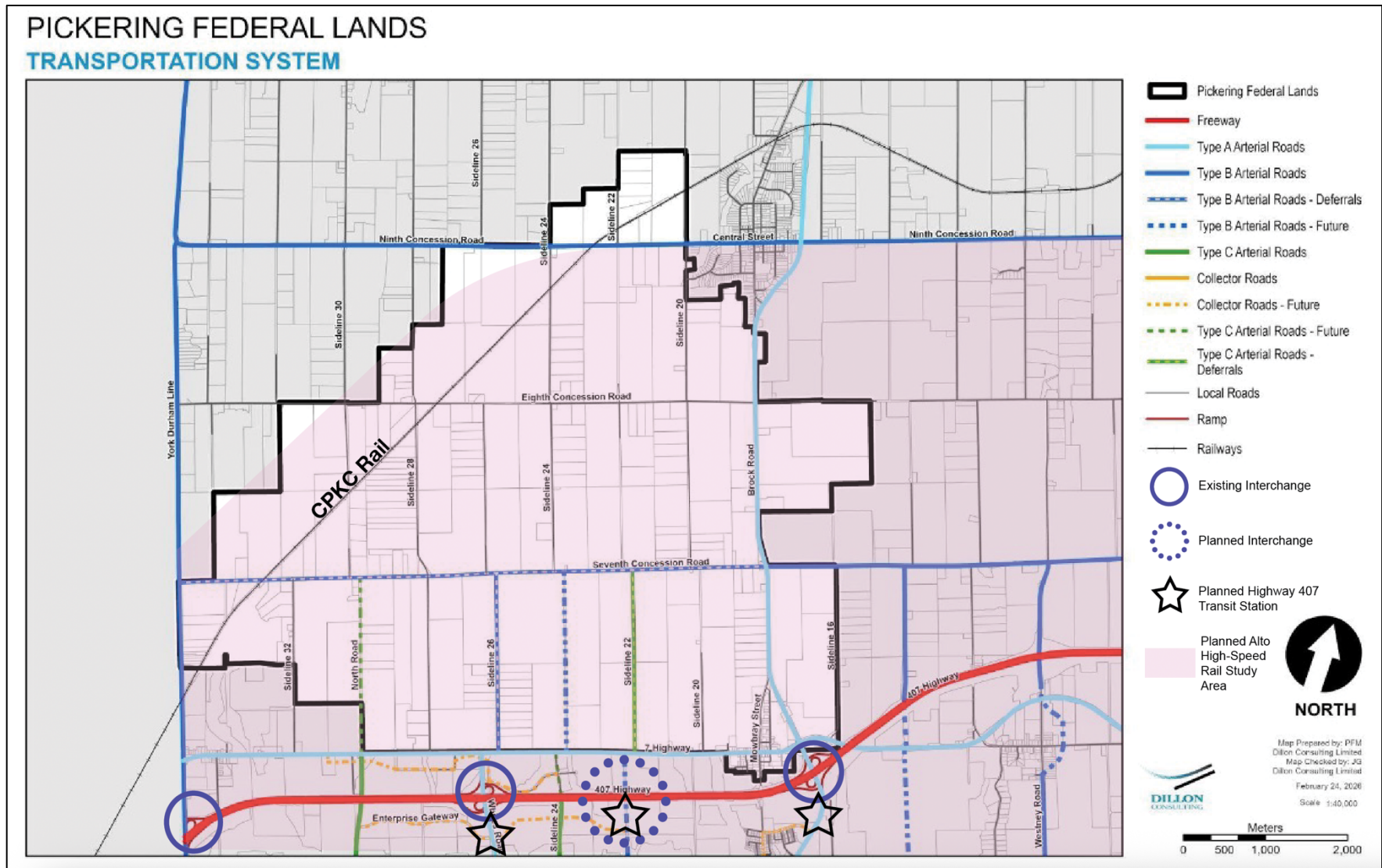


Figure 18: Existing and Future Transportation System within the Pickering Federal Lands

As part of the April 2025 Highway 7 Highway Access Management Plan prepared by BA Group on behalf of the Province of Ontario, Region of Durham, City of Pickering and Seaton Landowners Group along the Pickering Innovation Corridor, road realignments were recommended to address the needs of development in the Innovation Corridor and future growth. These planned road realignments onto the Pickering Federal Lands north of Highway 7 include: Sideline 26 – to align with Whites Road (**Figure 19**), Sideline 20 – to align with Country Lane (**Figure 20**), and Sideline 22 – to align with planned Peter Matthews Drive (three alignment options – **Figure 21**).

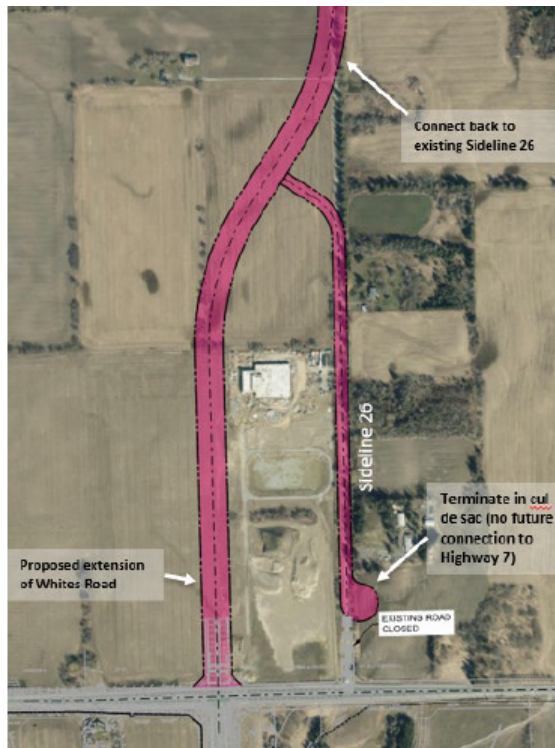


Figure 19: Sideline 26 Realignment

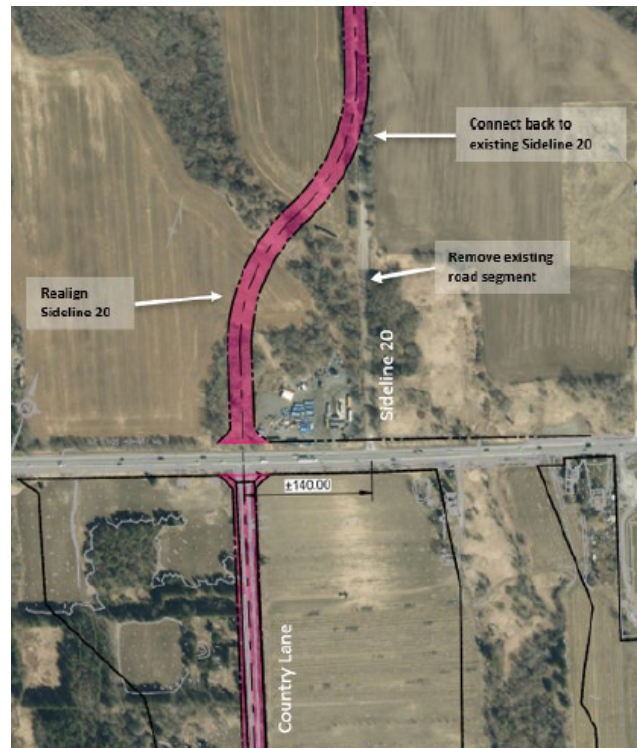


Figure 20: Country Lane /Sideline 20 Realignment



Figure 21: Sideline 22 Realignment – Three Alternatives

2.4.2 Active Transportation

Existing active transportation facilities in and around the Pickering Federal Lands include buffered bike lanes along Whites Road and sections of paved shoulders along Highway 7 from York Durham Line to Mowbray Street which is identified as a future cycling facility in the Province-Wide Cycling Network and Regional Cycling Plan. The planned Province-Wide Cycling Network travels along the edges of the Pickering Federal Lands as shown on **Figure 22**. The planned Regional Primary Cycling Network (PCN) also provides connections to the Pickering Federal Lands as shown on **Figure 22**.

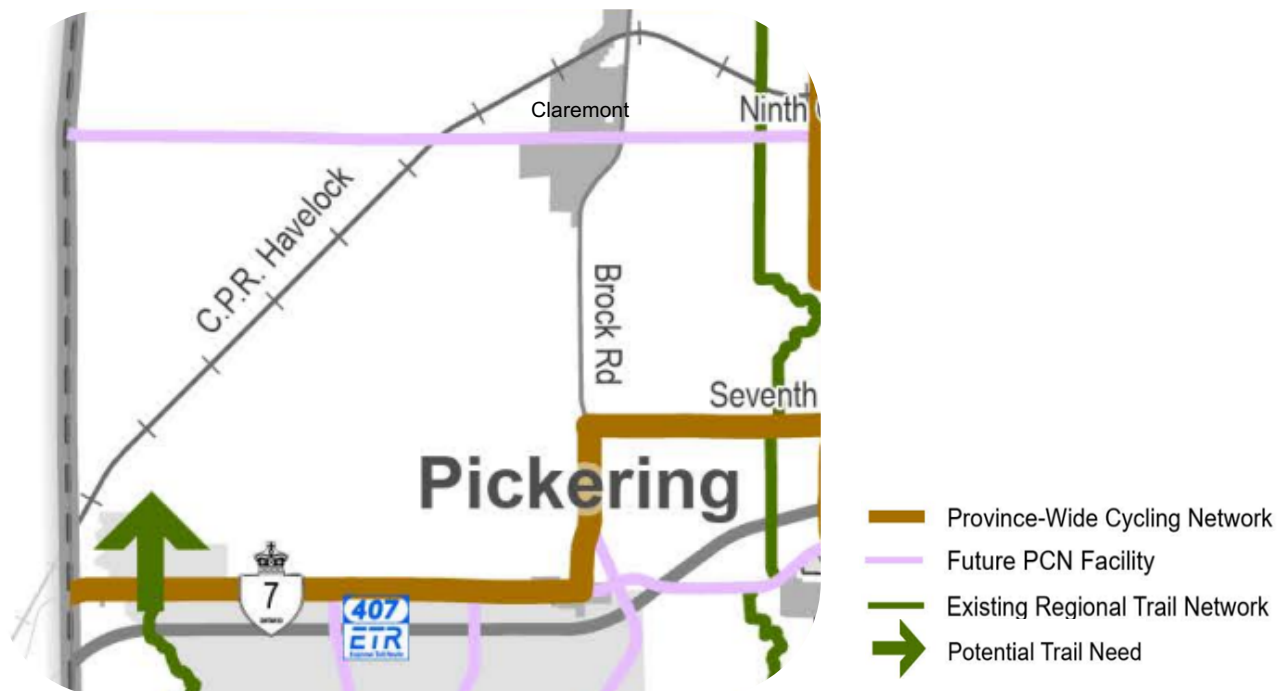


Figure 22: Active Transportation Facilities around the Pickering Federal Lands from Regional Official Plan, Map 3D – Active Transportation Network

2.4.3 Public Transit

Highway 7 and Peter Matthews Drive (planned) are ‘Transit Spines’ and Highway 407 and Brock Road are ‘Transit Feeders’ as identified in the City of Pickering’s Official Plan. ‘Transit Spines’ are corridors where a higher level of transit service is encouraged within the City’s urban area and ‘Transit Feeders’ are corridors where a higher level of transit service is encouraged connecting the City with other areas.

According to the Region’s Transportation Master Plan, Highway 7 and Brock Road within the Pickering Federal Lands are identified as High Frequency Bus in Shared Lane and Other Transit Spine, respectively as shown on **Figure 23**.

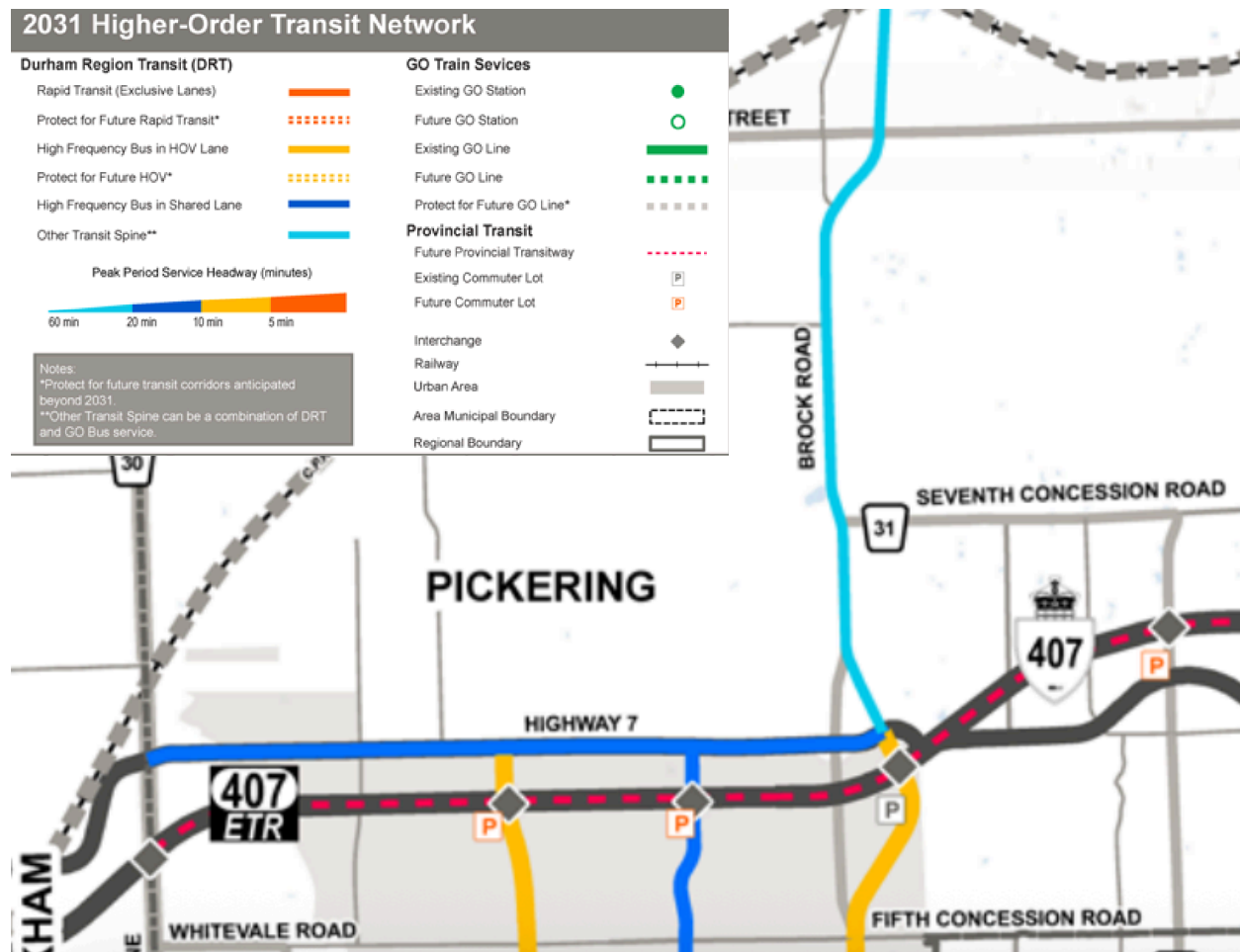


Figure 23: 2031 Higher-Order Transit Network from Durham Transportation Master Plan

A GO Bus station / Park & Ride / Carpool lot is located at the northwest corner of Brock Road and Ashe Avenue, just south of Highway 407.

Three Highway 407 transitway stations are planned along Highway 407 at Whites Road, Peter Matthews Drive, and Brock Road, just south of the Pickering Federal Lands as shown on **Figure 18**.

2.4.4 Rail

The CPKC Rail Line bisects the Pickering Federal Lands as shown on **Figure 18**. The CPKC Rail Line through Pickering is proposed as a possible commuter rail corridor with speeds reaching 300 kilometres per hour or more for the Toronto-Quebec City High-Speed Rail Network (Alto) which will connect Toronto and Quebec City.

Alto is currently studying a corridor approximately 10 kilometres wide to explore various alignment elements, conduct environmental and technical studies, and gather public input to refine the corridor. Ultimately, the corridor right-of-way will average about 60 metres wide. No route options have been presented by Alto at this time.

Following a preliminary analysis covering technical, environmental, social and financial aspects of the project, Alto will work on determining a preferred alignment with the first segment connecting Ottawa and Montreal. A high-level timeline found on Alto’s project website is shown on **Figure 24**.

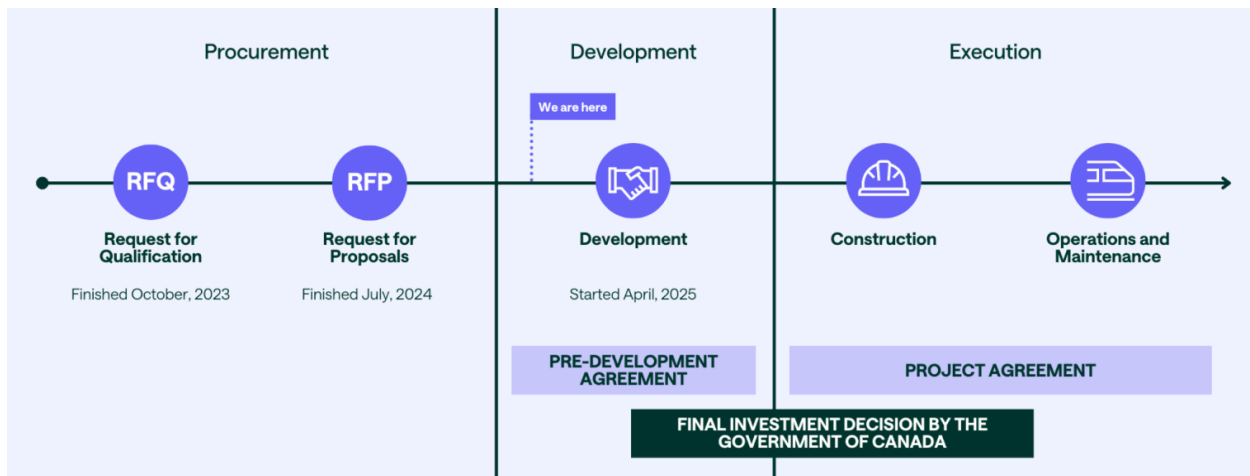


Figure 24: Alto Project Timeline

There are currently eight at-grade rail/road crossings within the Pickering Federal Lands and they include:

- York Durham Line;
- Seventh, Eighth, and Ninth Concession Road; and
- Sidelines 20, 22, 24 and 28.

2.5 Natural Feature Overview

This section highlights the natural heritage features in the Pickering Federal Lands from mapping from the Toronto Region Conservation Authority (TRCA) regulated areas, Ecological Land Classification Ranking, and the City of Pickering and Region of Durham Official Plans.

Figure 25 below depicts the TRCA floodline and TRCA regulated areas which represents constraints to development within the Pickering Federal Lands.

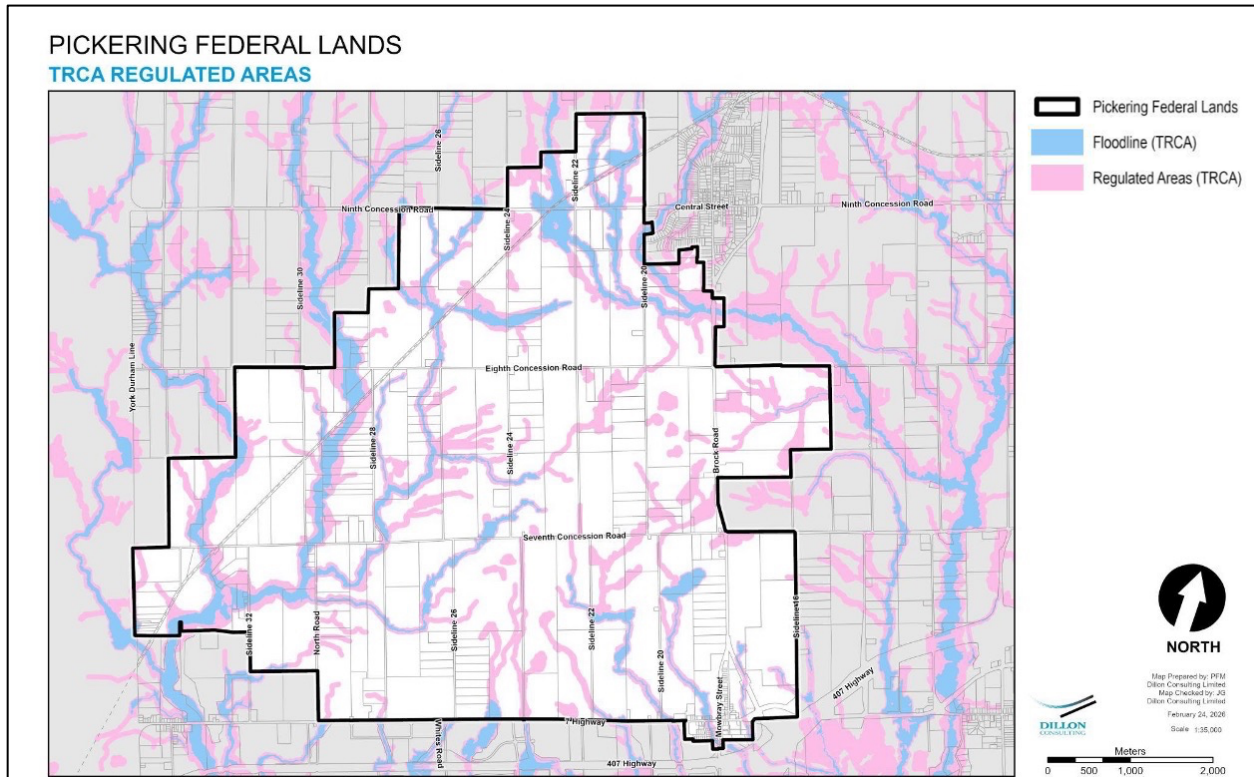


Figure 25: TRCA Regulated Areas within and around the Pickering Federal Lands

Figure 26 identifies high level ecological land classification in and around the Pickering Federal Lands. The majority of the Pickering Federal Lands do not have a rank for the ecological land classification because the lands are actively farmed for agricultural uses. A small portion of lands contain regional species of conservation concern in the southwest and in the north and should be protected.

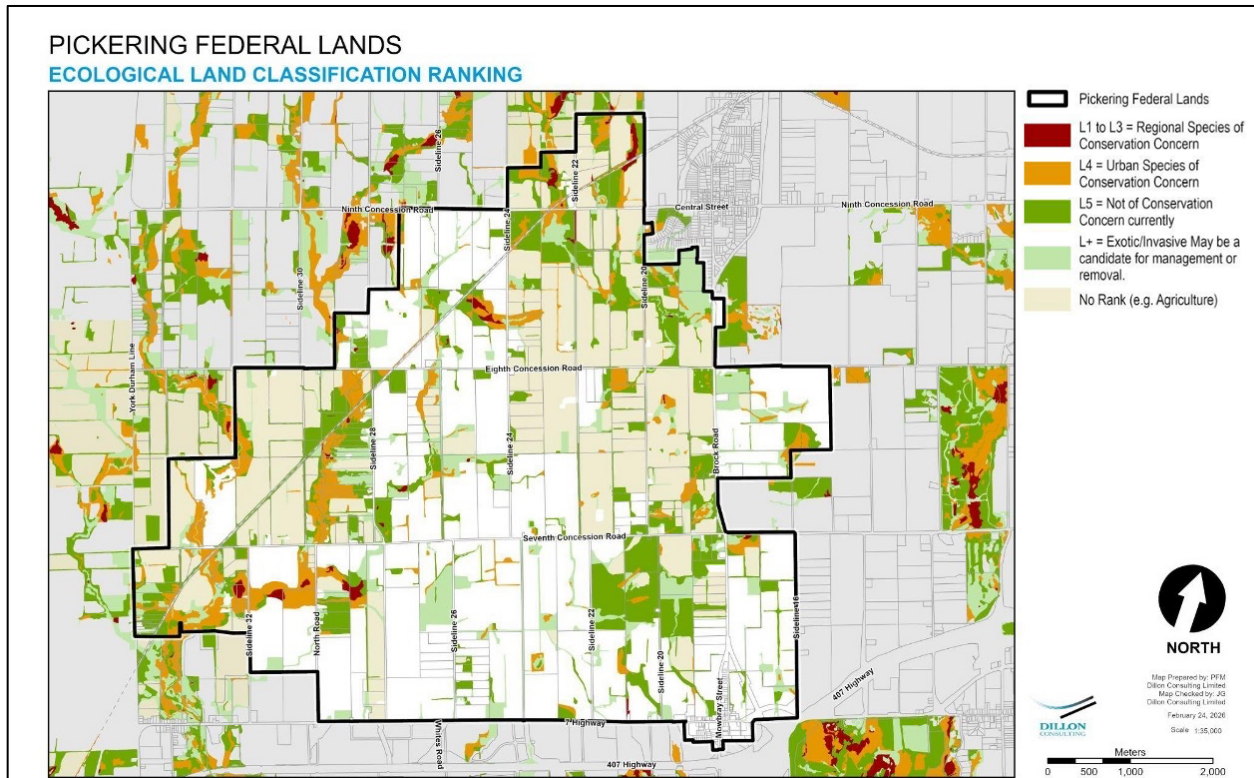


Figure 26: Ecological Land Classification Ranking within and around the Pickering Federal Lands

Figure 27 depicts a high level mapping of natural features based on these sources and the City of Pickering and Region of Durham Official Plan mapping.

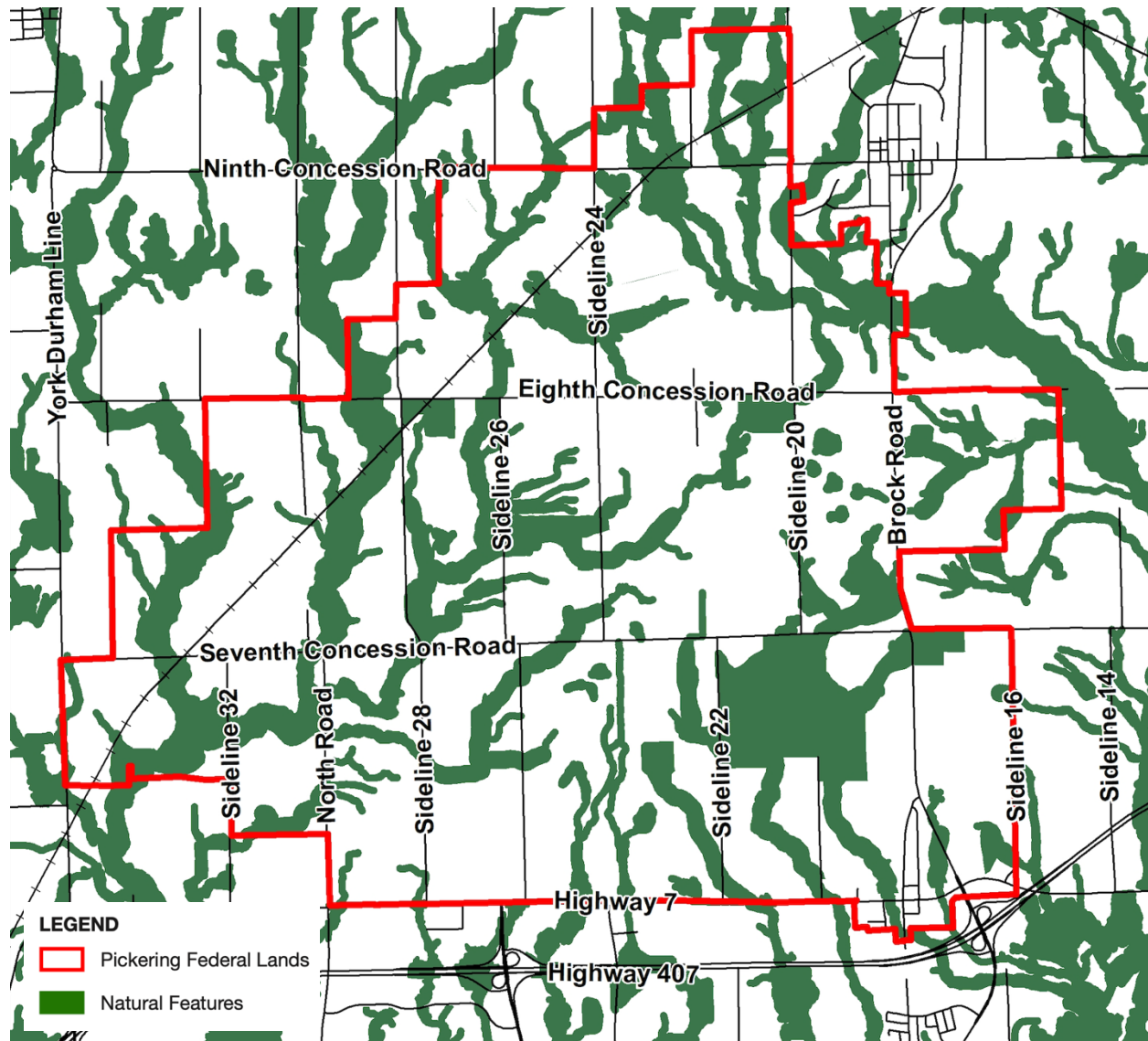


Figure 27: Natural Features within and surrounding the Pickering Federal Lands

2.6 Agricultural Overview

The Pickering Federal Lands are approximately 90% farmed by tenant farmers who alternate between crops of corn, soy and winter wheat. Some small-scale alternate farming operations are also present on the Pickering Federal Lands including community gardens, mushroom farming, and livestock. Tenant farmers currently rent their land at a cost of \$120 per workable acre per year.

The majority of the Pickering Federal Lands are considered prime agricultural lands (class 1, 2 and 3) and have no significant limitations in terms of land capability for agricultural except for some organic soils in the north and southeast as shown on **Figure 28**.

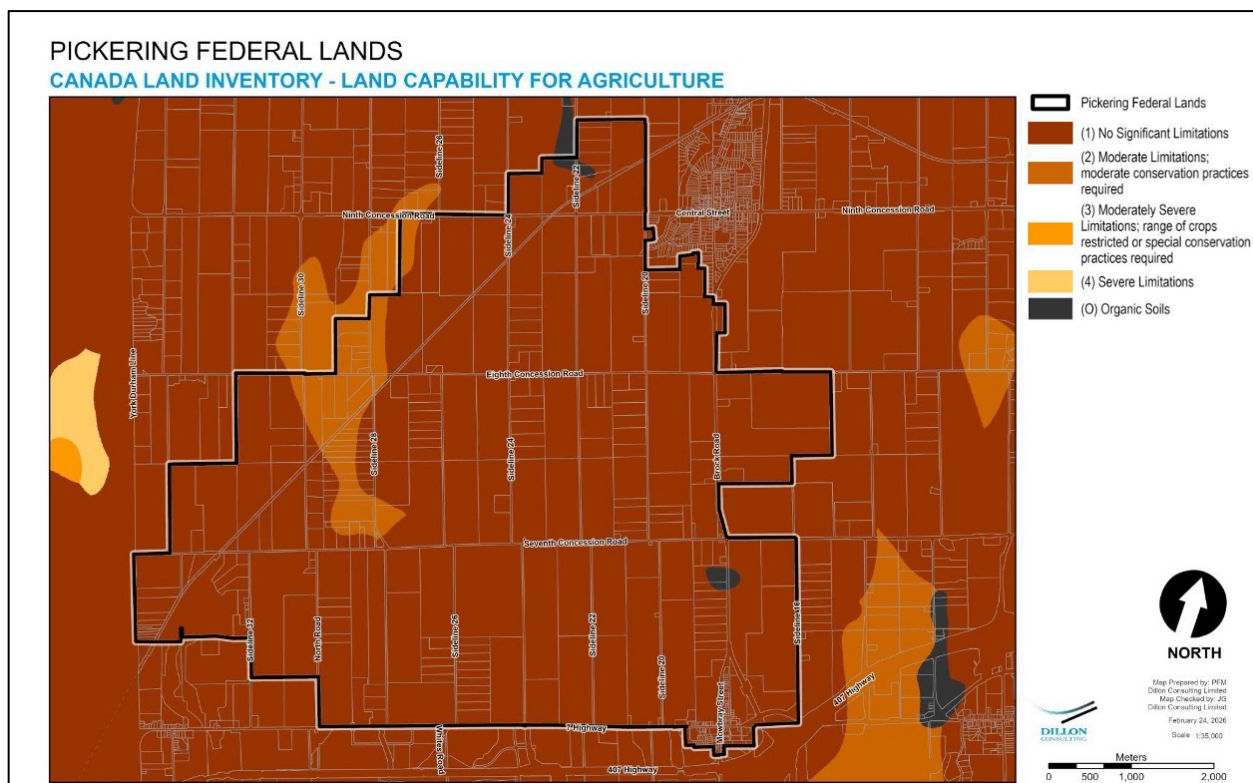


Figure 28: Canada Land Inventory within and around the Pickering Federal Lands

3 The Land Use Options



To provide input to Transport Canada’s engagement and to inform Council’s formal recommendations to be put forward to the Federal Government, the consulting team prepared three land use options that address the Key Themes identified by Transport Canada. These Key Themes include:

- Expansion of Rouge National Urban Park;
- Other Conservation and Environmental Protection;
- Other Public Parks and Recreational Spaces;
- Agricultural;
- Residential Development;
- Commercial Development;
- Industrial Development; and
- Transportation.

The options were developed based on background review provided in this report, opportunities and constraints, the Federal Key Themes, and policy direction. The land use options were prepared for discussion purposes to assist in the preparation of a Recommended Land Use Plan and recommendations from the City of Pickering on their vision for the long-term use of the Pickering Federal Lands.

A Fiscal Analysis was undertaken by Parcel to evaluate the three land use options from a fiscal impact perspective. The analysis estimated the economic impact of each option and modelled one-time investments, jobs generated, revenues, and municipal costs at full build-out. A detailed analysis of the fiscal impacts are included in **Appendix A** of this Report.

3.1.1 Land Use Option 1

Option 1 consists of the following proposed land areas as shown on **Figure 29**:

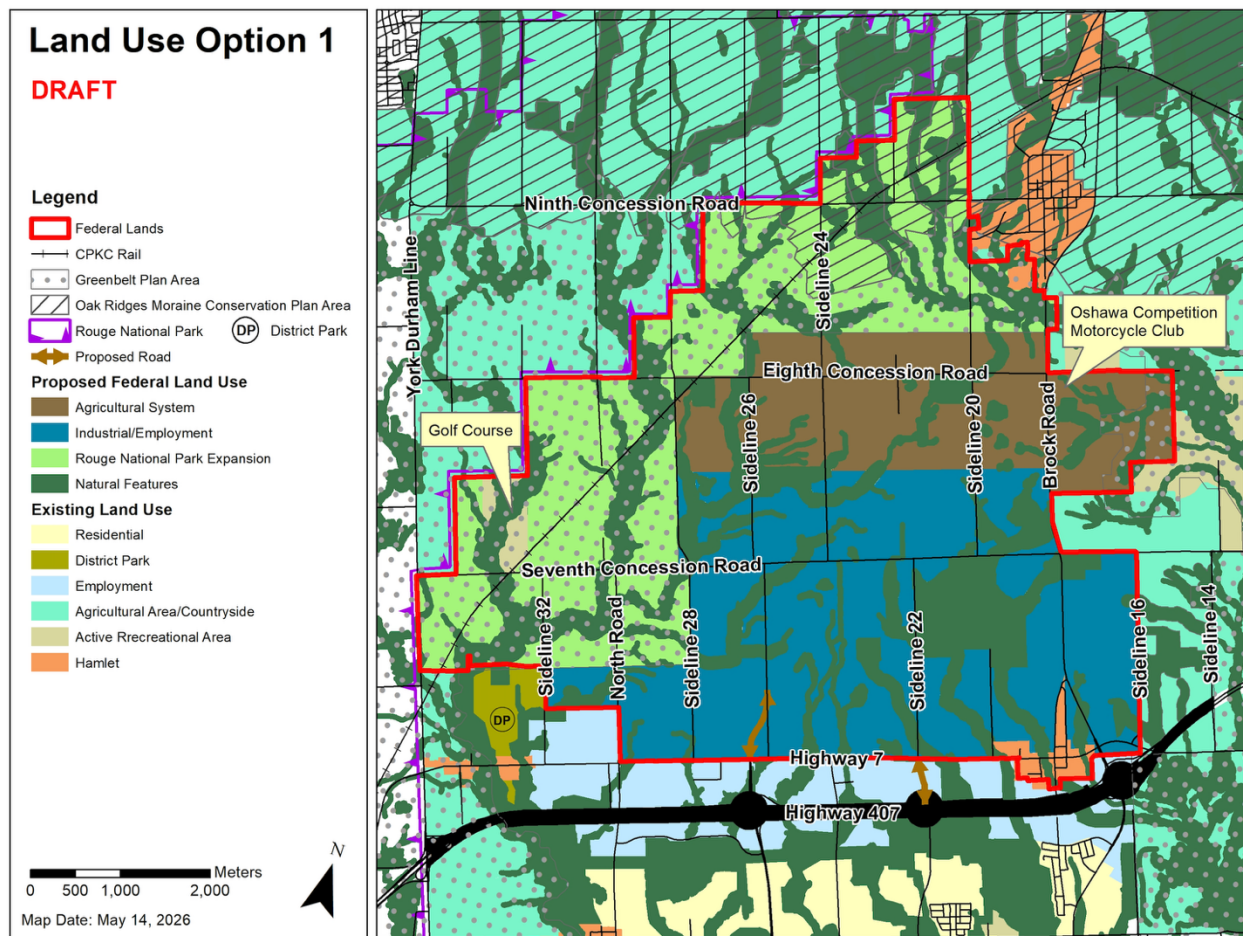


Figure 29: Land Use Option 1

Rouge National Urban Park Expansion

It is proposed that all lands within the Greenbelt Plan Area and the Oak Ridges Moraine Conservation Plan be transferred to the Rouge National Urban Park. This area represents approximately 1,430 hectares including the natural heritage features.

Conservation and Environmental Protection

The Natural Features are based on the Toronto Region Conservation Authority regulated areas as well as the Natural Areas of the Pickering Official Plan. **Option 1** protects 775 hectares of significant natural heritage features excluding the natural heritage features within the proposed Rouge National Urban Park.

Public Parks and Recreational Spaces

The existing Pickering Glen Golf Club and the Oshawa Competition Motorcycle Club within the Pickering Federal Lands should be maintained.

Recommendation Report

City of Pickering

Agricultural Use

Option 1 proposes that the lands between the industrial / employment area and the expanded Rouge National Urban Park generally straddling Eighth Concession Road be designated as a privately-owned agricultural system which comprises approximately 565 hectares. The proposed agricultural system would be comprised of a group of interconnected elements that collectively create a viable, thriving agri-food sector. Based on the PPS 2024 definition, these elements consist of prime agricultural areas/rural lands as well as an agri-food network which includes agricultural operations, infrastructure, services and assets essential to the viability of the agri-food sector.

Residential Development

No residential development is proposed as part of this option.

Industrial / Employment Development

This Option maximizes the amount of industrial/employment lands based on the calculated future need of 1,100 hectares to 2071. The industrial/employment lands are proposed to be located from Highway 7 north to halfway between Seventh Concession Road and Eighth Concession Road, between Sideline 28 and the eastern boundary of the Pickering Federal Lands. This amount of land could generate 22,700 jobs.

Transportation and Servicing

Roads within the industrial / employment areas will require significant upgrades and all remaining roads outside of the urban area will have to be upgraded to appropriate rural standards. Full municipal servicing would be required in the industrial / employment portion of the Pickering Federal Lands. Municipal services should also be extended to Brougham. The following transportation improvements to the road network are recommended for **Option 1**:

- Upgrade to Type A Arterial
 - Sideline 26 – Seventh Concession Road to Highway 7 (re-align to connect with Whites Road)
- Upgrade to Type B Arterial
 - Seventh Concession Road – York-Durham Line to Brock Road (upgrade CPKC Rail Crossing)
 - Sideline 22 – Seventh Concession Road to Highway 7 (re-align to connect with Peter Matthews Drive)
- Upgrade to Type C Arterial
 - North Road – Seventh Concession Road to Highway 7

Recommendation Report

City of Pickering

- Sideline 24 – Seventh Concession Road to Highway 7 (re-align to connect with Sideline 24 south of Highway 7) (new road)
- Upgrade to Collector Road
 - Sideline 32 – Seventh Concession Road to Highway 7
 - Sideline 28 – Seventh Concession Road to Highway 7
 - Sideline 20 – Seventh Concession Road to Highway 7 (re-align to connect with Country Lane)
- New Collector Road
 - North of Seventh Concession Road between Sideline 28 and Brock Road

Based on Durham Region’s design criteria for industrial land uses (1.04 L/s/ha) for trunk sewers, **Option 1** is expected to generate about 1,144 litres per second of theoretical trunk flow which exceeds the allocated capacity for the Pickering Federal Lands of 300 litres per second. A planning level cost estimate for the construction and upgrade of the road network as well as full municipal servicing is about \$400 to \$450 million for **Option 1**.

3.1.2 Land Use Option 1 Opportunities and Constraints

Opportunities

- **Option 1** is a logical extension of the existing Seaton employment area and proposes industrial/employment lands adjacent to the Innovation Corridor in Seaton.
- Additional employment uses in this location can help create a Pickering employment hub along Highway 407. Also, these employment lands help to capitalize on previous investments along Highway 407 and planned investments in the widening of Highway 7.
- Substantial potential for long-term industrial/employment growth.
- Logical expansion of Pickering Innovation Corridor.
- All Greenbelt and Oak Ridges Moraine Lands added to the Rouge National Urban Park.
- Expansion of Rouge National Urban Park could be used for park uses and/or ongoing agricultural operations.
- All significant natural heritage features are protected.
- Investment and improvement to agricultural lands and the creation of an agricultural system is more likely if the lands are owned by farmers or on very long-term leases.
- Residents may have greater access to a supply of local food that supports the food value chain and various food production related industries as well as the economy.
- Existing golf club and motorcycle club will be maintained.

Recommendation Report

City of Pickering

- Generates the greatest investment (\$5.3 billion) and revenues (\$347 million one-time and \$25.8 million annually) out of all three options.

Constraints

- Industrial/employment lands north of Seventh Concession Road are likely to be less desirable due to being further away from major transportation corridors (Highway 7 and Highway 407).
- Industrial/employment lands in Brougham west of Brock Road are also less desirable due to the compatibility issues with the existing residential uses within the hamlet.
- No additional public parks nor recreational spaces are proposed.
- Short-term leases create less incentives for on-farm and agricultural-related investments.
- Requires the greatest amount of transportation improvements and servicing infrastructure.
- Water and sanitary sewer capacity will need to be confirmed and planned.
- Does not address residential development Federal Key Theme.
- Agricultural system lands could be purchased by speculators.
- Highest operating costs (\$18.2 million) due to the greatest employment/industrial land area.

3.1.3 Land Use Option 2

Option 2 consists of the following proposed land areas as shown on **Figure 30**:

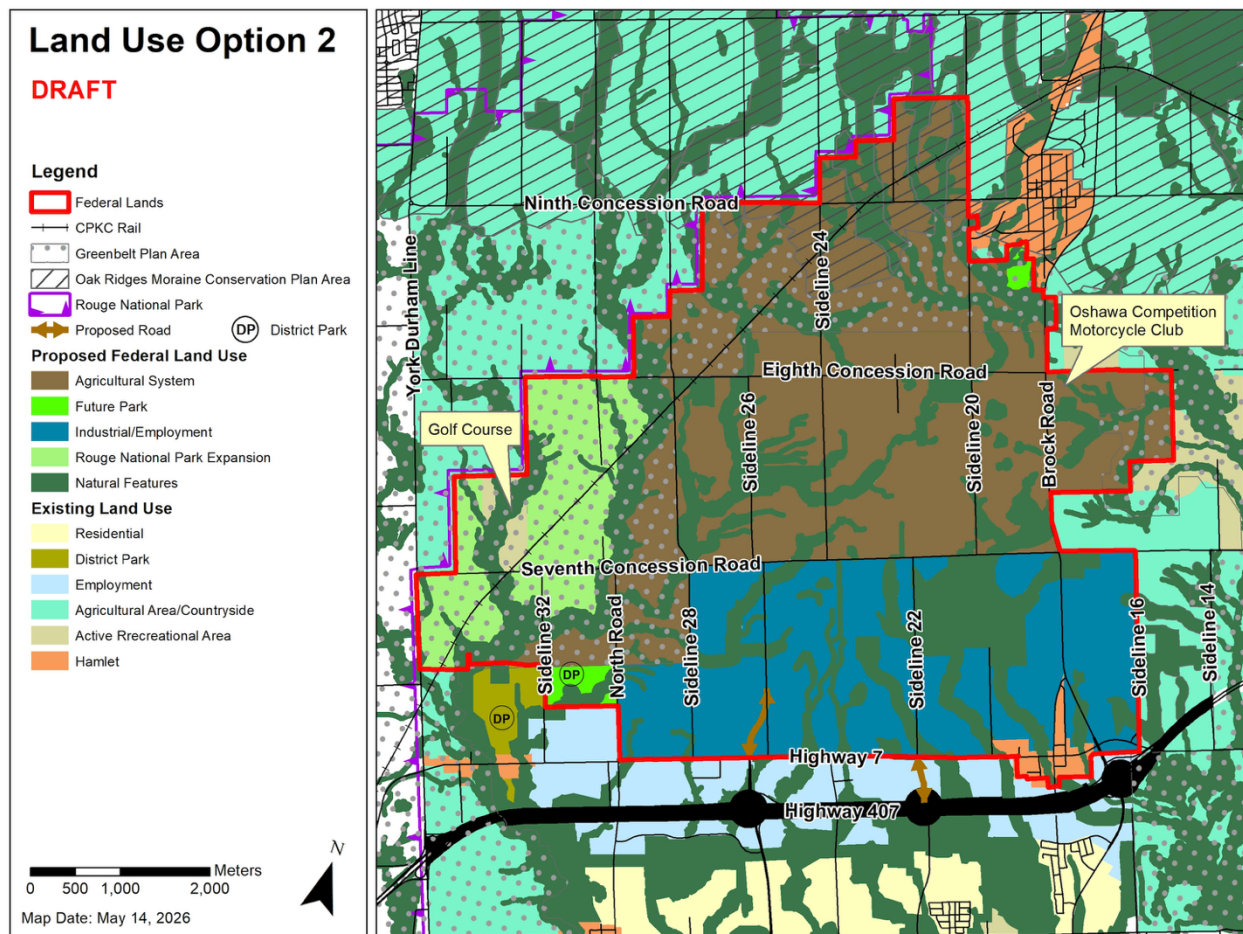


Figure 30: Land Use Option 2

Rouge National Urban Park Expansion

The RNUP is proposed to be expanded to the east branch of Duffins Creek which creates a logical boundary to the RNUP. Approximately 470 hectares of land are proposed to be transferred to the RNUP including the natural heritage features within that area.

Conservation and Environmental Protection

The Natural Features are based on the Toronto Region Conservation Authority regulated areas as well as the Natural Areas of the Pickering Official Plan. **Option 2** protects 1,160 hectares of significant natural heritage features excluding the natural heritage features within the proposed Rouge National Urban Park.

Recommendation Report

City of Pickering

Public Parks and Recreational Spaces

Option 2 contemplates a 20 hectare expansion to the district park at Green River Sideline 32 and North Road just south of the Greenbelt for a multi-sport field complex.

Option 2 also proposes a 10 hectare future park in the southwest corner of Claremont within the existing Open Space System – Recreational Areas designation.

The existing Pickering Glen Golf Club and the Oshawa Competition Motorcycle Club within the Pickering Federal Lands should be maintained.

Agricultural Use

Option 2 proposes a larger privately-owned agricultural system than **Option 1** and the greatest of the three options comprising approximately 1,405 hectares.

Residential Development

No residential development is proposed as part of this option.

Industrial/Employment Development

Option 2 proposes a slightly smaller amount of industrial/employment land than **Option 1** extending north from Highway 7 and the Innovation Corridor to Seventh Concession Road resulting in 810 hectares of land which could generate 16,700 jobs.

Transportation and Servicing

Option 2 requires less transportation improvements and servicing infrastructure than **Option 1** but full municipal servicing would be required within the industrial / employment portion of the Pickering Federal Lands in conjunction with the proposed road network upgrades. All remaining roads outside of the urban area will have to be upgraded to appropriate rural standards. Municipal services should also be extended to Brougham. The following transportation improvements to the road network are recommended for **Option 2**:

- Upgrade to Type A Arterial
 - Sideline 26 – Seventh Concession Road to Highway 7 (re-align to connect with Whites Road)
- Upgrade to Type B Arterial
 - Seventh Concession Road – York-Durham Line to Brock Road (upgrade CPKC Rail Crossing)
 - Sideline 22 – Seventh Concession Road to Highway 7 (re-align to connect with Peter Matthews Drive)

Recommendation Report

City of Pickering

- Upgrade to Type C Arterial
 - North Road – Seventh Concession Road to Highway 7
 - Sideline 24 – Seventh Concession Road to Highway 7 (re-align to connect with Sideline 24 south of Highway 7) (new road)
- Upgrade to Collector Road
 - Sideline 32 – Seventh Concession Road to Highway 7
 - Sideline 28 – Seventh Concession Road to Highway 7
 - Sideline 20 – Seventh Concession Road to Highway 7 (re-align to connect with Country Lane)

Based on Durham Region's design criteria for industrial land uses (1.04 L/s/ha) for trunk sewers, **Option 2** is expected to generate about 866 litres per second of theoretical trunk flow which exceeds the allocated capacity for the Pickering Federal Lands of 300 litres per second. A planning level cost estimate for the construction and upgrade of the road network as well as full municipal servicing is about \$350 to \$400 million for **Option 2**.

3.1.4 Land Use Option 2 Opportunities and Constraints

Opportunities

- RNUP expanded to east branch of Duffins Creek.
- Expansion of Rouge National Urban Park could be used for park uses and/or ongoing agricultural operations.
- All significant natural heritage features are protected in **Option 2**.
- District Park in Green River expanded to provide additional lands for major outdoor/indoor recreational uses.
- The proposed future park in Claremont could introduce new public park to serve the residents of Claremont and the surrounding rural community.
- Significant potential for long-term industrial/employment growth.
- Logical extension of existing Pickering Innovation Corridor.
- Industrial/employment lands limited to south of Seventh Concession Road is closer to Highways 7 and 407 and the Pickering Innovation Corridor.
- Additional employment uses in this location can help create a Pickering employment hub along Highway 407. Also, these employment lands help to capitalize on previous investments along Highway 407 and planned investments in the widening of Highway 7.
- Allows for industrial/employment growth in other areas of the Region.
- Investment and improvement to the agricultural lands and the creation of an agricultural system is more likely if the lands are owned by farmers or on very long-term leases.

Recommendation Report

City of Pickering

- Residents may have greater access to a supply of local food that supports the food value chain and various food production related industries as well as the economy.
Existing golf club and motorcycle club will be maintained.
- Generates more investment (\$3.9 billion) and revenues (\$255.4 million one-time and \$19 million annually) than **Option 3**.

Constraints

- Short-term leases create less incentives for on-farm and agricultural-related investments.
- The proposed industrial/employment between Brougham Road and Brock Road in Brougham is less desirable due to the potential conflict with existing residential uses within the hamlet.
- Limited expansion of the Rouge National Urban Park.
- Requires substantial transportation/servicing infrastructure upgrades.
- Water and sanitary sewer capacity will need to be confirmed and planned.
- Does not address residential development Federal Key Theme.
- Agricultural system lands could be purchased by speculators.
- Substantially lower net operating impacts due to less revenues associated with non-residential development.

3.1.5 Land Use Option 3

Option 3 consists of the following proposed land areas as shown on **Figure 31**:

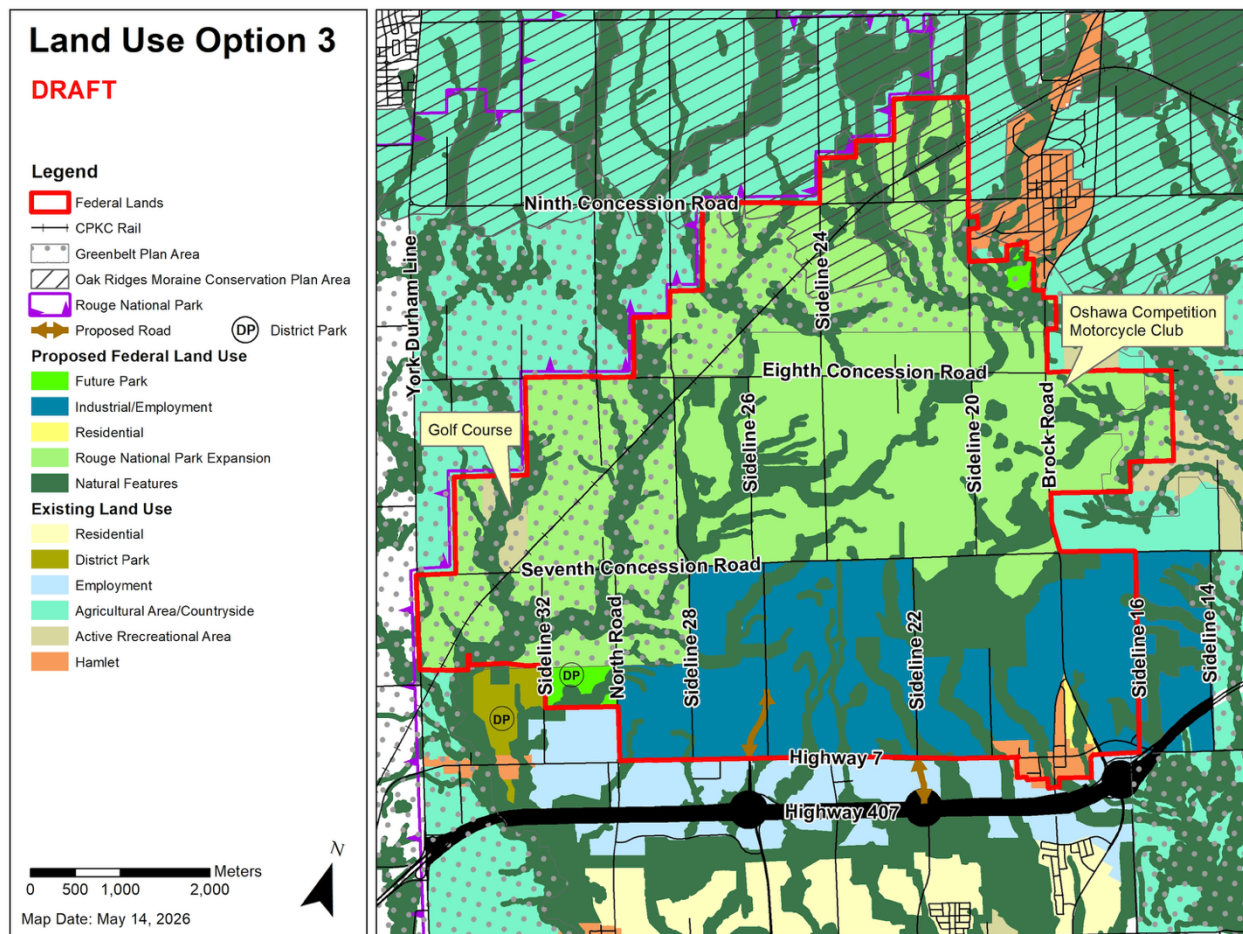


Figure 31: Land Use Option 3

Rouge National Urban Park Expansion

The proposed RNUP is expanded to include all lands north of the proposed Industrial/Employment Area. However, the existing golf course (Pickering Glen Golf Club) and the Oshawa Competition Motorcycle Club should be allowed to continue through long-term leases. The Rouge National Urban Park would comprise approximately 2,315 hectares including natural heritage features.

Conservation and Environmental Protection

The Natural Features are based on the Toronto Region Conservation Authority regulated areas as well as the Natural Areas of the Pickering Official Plan. **Option 3** protects 410 hectares of significant natural heritage features excluding the natural heritage features within the proposed Rouge National Urban Park expansion.

Recommendation Report

City of Pickering

Public Parks and Recreational Spaces

Option 3 contemplates a 20 hectare expansion to the district park at the southwest corner between Sideline 32 and North Road just south of the Greenbelt. **Option 3** also proposes a 10 hectare future park in the southwest corner of Claremont within the existing Open Space System – Recreational Areas designation.

The existing Pickering Glen Golf Club and the Oshawa Competition Motorcycle Club within the Pickering Federal Lands should be maintained.

Agricultural Use

No Agricultural System designation is proposed, however, agricultural uses will be permitted in the Rouge National Urban Park (RNUP). Therefore, no privately-owned agricultural land would be available.

Residential Development

A small area of residential use (10 ha) is proposed adjacent to the Brougham Hamlet. The proposed residential uses are located between Brougham Road and Brock Road and will complement the existing Hamlet Residential area.

Industrial/Employment Development

Option 3 proposes a slightly less amount of industrial/employment land than **Option 2** at 780 hectares. The 780 hectares of industrial/employment lands could generate approximately 16,000 jobs. The industrial/employment lands are proposed to be located between Highway 7 and Seventh Concession Road except for the areas north of the large central natural feature east of Sideline 22. The lands will extend from North Road south of the Greenbelt, east towards Sideline 16 which represents a logical extension of the existing Seaton employment area. Should these lands be designated industrial/employment lands, the industrial/employment area should be extended east to the Greenbelt at Sideline 14 between Seventh Concession Road and Highway 7 (outside of the Pickering Federal Lands) because it represents a logical extension along the Highway 407 and Highway 7 corridor.

Transportation and Servicing

Option 3 requires less transportation improvements and servicing infrastructure than **Option 1** but full municipal servicing would be required in the industrial / employment portion of the Pickering Federal Lands in conjunction with the proposed road network upgrades. Municipal services should also be extended to Brougham. All remaining roads outside of the urban area will have to be upgraded to appropriate rural standards. As well, the following transportation improvements to the road network are recommended for **Option 3**:

Recommendation Report

City of Pickering

- Upgrade to Type A Arterial
 - Sideline 26 – Seventh Concession Road to Highway 7 (re-align to connect with Whites Road)
- Upgrade to Type B Arterial
 - Seventh Concession Road – York-Durham Line to Brock Road (upgrade CPKC Rail Crossing)
 - Sideline 22 – Seventh Concession Road to Highway 7 (re-align to connect with Peter Matthews Drive)
- Upgrade to Type C Arterial
 - North Road – Seventh Concession Road to Highway 7
 - Sideline 24 – Seventh Concession Road to Highway 7 (re-align to connect with Sideline 24 south of Highway 7) (new road)
- Upgrade to Collector Road
 - Sideline 32 – Seventh Concession Road to Highway 7
 - Sideline 28 – Seventh Concession Road to Highway 7
 - Sideline 20 – Seventh Concession Road to Highway 7 (re-align to connect with Country Lane)

Based on Durham Region’s design criteria for industrial land uses (1.04 L/s/ha) for trunk sewers, **Option 3** is expected to generate about 915 litres per second of theoretical trunk flow which exceeds the allocated capacity for the Pickering Federal Lands of 300 litres per second. A planning level cost estimate for the construction and upgrade of the road network as well as full municipal servicing is about \$350 to \$400 million for **Option 3**.

3.1.6 Land Use Option 3 Opportunities and Constraints

Opportunities

- RNUP expanded significantly to include all lands north of the Industrial/Employment Area.
- Expansion of Rouge National Urban Park could be used for park uses and/or ongoing agricultural operations.
- All significant natural heritage features are protected.
- District park in Green River expanded to provide additional lands for major outdoor/indoor recreational uses.
- Proposed park in Green River could provide connections to the Rouge National Urban Park further west.
- Proposed future park in Claremont could introduce new public park to serve the residents of Claremont and the surrounding rural community.
- Logical extension of the Pickering Innovation Corridor.

Recommendation Report

City of Pickering

- Significant potential for long-term industrial/employment growth.
- Additional employment uses in this location can help create a Pickering employment hub/node along Highway 407. Also, these employment lands help to capitalize on previous investments along Highway 407 and planned investments in the widening of Highway 7.
- Existing golf club and motorcycle club will be maintained.
- Generates less investment (\$3.7 billion) and revenues (\$244.4 million one-time and \$18.2 million annually) than **Options 1** and **2**.
- Provides for modest residential growth in Brougham to help revitalize the Hamlet.
- Keeps agricultural lands from being purchase by speculators.

Constraints

- Agricultural uses in the RNUP will likely be leased which limits the opportunities for long-term farm investments and is less likely to create a vibrant agricultural system on the Pickering Federal Lands.
- Industrial/employment lands limited to south of Seventh Concession Road and south of the natural area east of Sideline 22 is closer to Highways 7 and 407 as well as the Pickering Innovation Corridor.
- Requires substantial transportation/servicing infrastructure upgrades.
- Water and sanitary sewer capacity will need to be confirmed and planned.
- Substantially lower net operating impacts due to less revenues associated with non-residential development.

4 Engagement Summary



As part of the City's engagement on the future uses of the Pickering Federal Lands, meetings to discuss the options were held both virtual and in person with the Project Steering Committee, the Durham Agricultural Advisory Committee (DAAC), Lakeridge Health, Northeast Pickering Landowners Group, Region of Durham, Members of Council, the City's local MP, and the Mayors of Whitchurch-Stouffville and Uxbridge, the deputy mayor of Ajax and the Chair of Durham Region. A Public Open House was also held on April 22, 2026 at City Hall.

Input received from the Steering Committee meeting, focus group/one-on-one meetings, and the Open House informed the Staff Recommended Land Use Plan and the recommendations in Section 5 of this Report and provide the basis for input into Transport Canada's ongoing engagement.

The following summarizes input received from stakeholders, members of the public, landowners and elected officials grouped into the different Federal Key Themes including questions about fiscal impacts:

Rouge National Urban Park Expansion

- Support for the expansion of the RNUP across the entire Pickering Federal Lands and transfer of Pickering Federal Lands to Parks Canada.

Conservation and Environmental Protection

- Concerns regarding negative impacts to natural heritage features, biodiversity, and ecological system.
- Preservation of natural features over development, especially in ecologically significant areas (i.e., wetlands, woodlots, etc.).
- Public concerns with potential flooding downstream.
- Presence of heritage-listed properties.

Public Parks and Recreational Spaces

- Support for expansion of park and recreational spaces for a district park.
- Recognize social and health benefits of a district park.
- Not enough parkland provided due to expansion of RNUP.

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Agricultural

- Support for protecting agricultural uses for food security, local economic resilience, and long-term sustainability.
- Preference for private land ownership or long-term leases to support farm investments.
- Concerns with agricultural viability if lands transferred to RNUP with leases.
- Short-term leases limit investment into the lands.
- Existing lessees have also expressed interest in retaining their leases and potentially expanding their operations.
- Concern for land speculation if lands offered for sale.

Residential Development

- Some support for limited residential development around Brougham.
- Concerns with overdevelopment and burdens on existing infrastructure capacity.
- Not a priority compared to expansion of RNUP, conservation or agricultural uses.
- Interested in long-term protection.
- Concerns with no connection for residential to amenities, grocery stores, transit, schools, etc.
- Consideration for affordable housing managed by Canada Lands Company.
- Inclusion of lands for long-term care facilities.

Commercial/Industrial Development

- Concerns with over-allocation of employment lands.
- Concerns with impact on natural heritage system and agricultural lands.
- Some support for job creation and strategic location of employment lands near Highways 407 and 7.
- Industrial/employment lands along Highway 7 are a logical expansion of employment north of Seaton.
- Opportunity to contribute positively to public health through job creation and income creation.
- Concerns with employment uses related to distribution/warehousing.
- General support for more job creation in Durham.
- Some emphasized the importance of locating employment along planned transportation corridors like Highways 407 and 7 to support logistics efficiency.

Transportation/Servicing

- Not a priority for respondents.
- Concerns with lack of infrastructure capacity and the implications of Alto.
- Roads in the Pickering Federal Lands are predominantly owned and managed by the Federal Government.

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- Concerns over current state of roads and infrastructure.
- Servicing planned for the Pickering Federal Lands do not contemplate development beyond what would be required for an airport and supporting employment uses.
- Compensation for Seaton Landowners Group for front-ending infrastructure to support the previously planned airport.

Fiscal Impacts

- Costs associated with upgrading and maintaining roads within the Pickering Federal Lands.
- Require fiscal analysis to understand impacts on municipal finance.
- Implications for development charges associated with different Land Use Options.

5 Recommendations



We heard through the Public Open House desire for the Pickering Federal Lands to be transferred in their entirety to Parks Canada for an expansion of the RNUP. An expansion over these lands to create a much larger RNUP would not generate any additional employment land or significant economic and fiscal benefits to the City; no additional City owned public park or recreational spaces; and agricultural lands would likely be leased which limits the opportunity for long-term farm investments.

Expanding the RNUP could create additional financial burdens for the City due to additional City services required by the residents of the park and would have a net negative financial impact to the City since the lands are owned by the Federal Government. Fees associated with the park development would not go to the City and no additional municipal revenues are anticipated beyond the \$1.1 million the City currently receives annually as cash-in-lieu property tax payments.

As a result, based on a review of the opportunities and constraints of the three land use options and stakeholder and public input to those options, the consulting team has developed a set of recommendations that aims to provide a balance of land uses to inform Council's response to the Transport Canada's engagement on the future uses of the former Pickering Federal Lands. A graphic representation on those recommendations is contained in **Figure 33** which shows how the various land uses should be distributed. Further description of these recommendations are provided in text below.

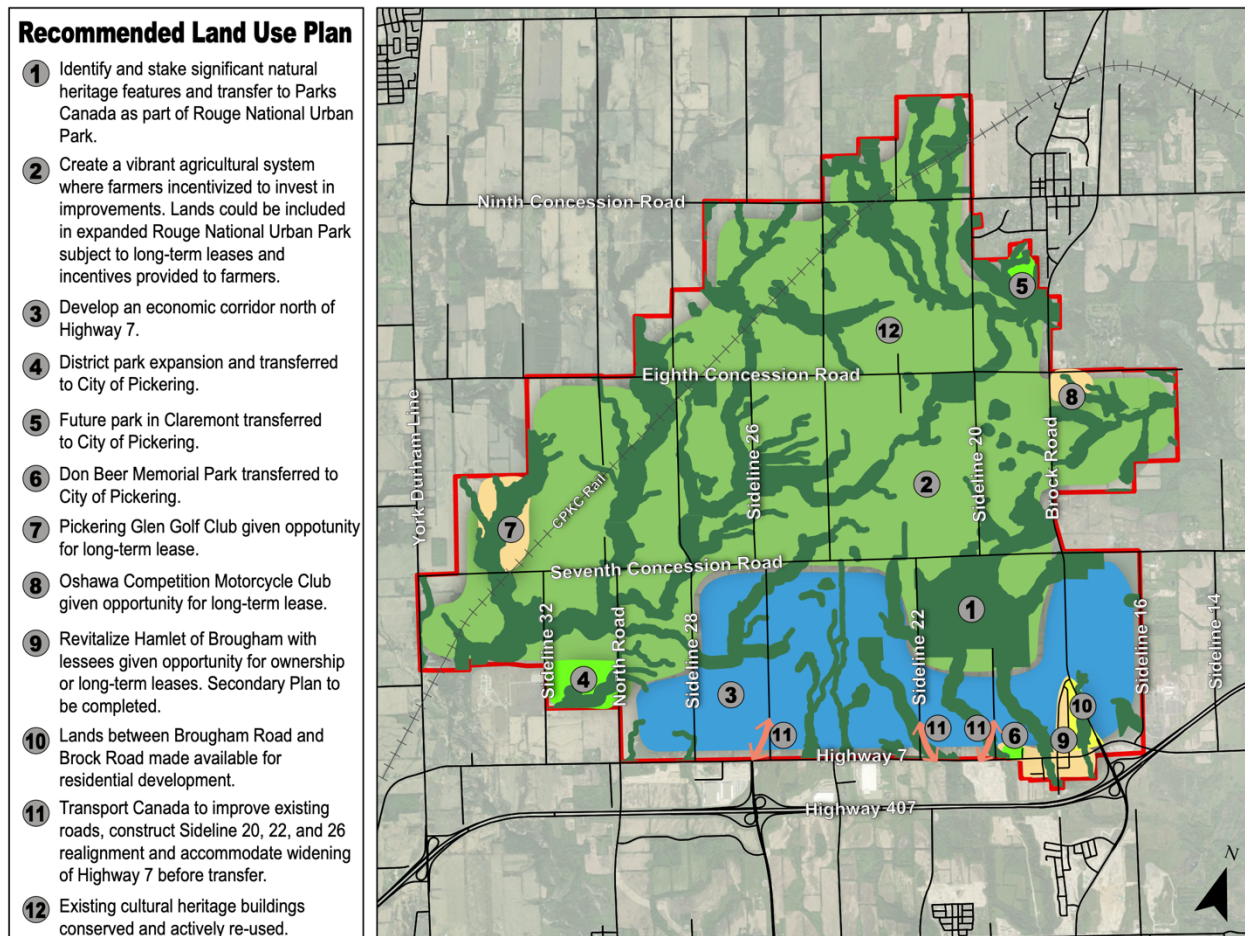


Figure 33: Recommended Land Use Plan for the Pickering Federal Lands

The following recommendations consider each of the Federal Key Themes:

- It is recommended that Transport Canada create a land use plan to help define the priorities for the Pickering Federal Lands over a long-term planning horizon. The land use plan should take into consideration the recommendations presented herein and be provided to the public for review and comment.
- All significant natural heritage features should be identified in the field, staked and appropriate vegetation protection zones applied. These staked natural heritage features should be transferred to Parks Canada as part of the Rouge National Urban Park.
- Approximately 20 hectares between Sideline 32 and North Road should be transferred to the City of Pickering for an expansion of its district park to be used for major indoor and outdoor recreational facilities and sport amenities to serve the residents of Pickering.

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- Approximately 10 hectares designated as Open Space System – Recreational Areas in the Hamlet of Claremont should be transferred to the City of Pickering for park purposes to serve the residents of Claremont and the surrounding rural community.
- Don Beer Memorial Park within the Hamlet of Brougham should be transferred to the City of Pickering to manage, operate, and maintain the existing park.
- Other existing recreational uses such as the Pickering Glen Golf Club and the Oshawa Competition Motorcycle Club should be given the opportunity to acquire long-term leases to continue their operations.
- Existing cultural heritage buildings within the Pickering Federal Lands should be conserved and actively reused to prevent from falling into disrepair.
- The presence of significant archaeological sites within the Pickering Federal Lands should be further investigated and the appropriate protection provided.
- Transport Canada should work with the Provincial Government to revoke O. Reg. 102/72 to permit the future development of the Pickering Federal Lands.
- The Hamlet of Brougham should be revitalized with residential and commercial lessees in the Hamlet provided the opportunity to either purchase their leased properties or enter into long-term leases. A secondary plan should be undertaken by the City to identify the appropriate residential and commercial land uses to revitalize the Hamlet and updated zoning put in place. Following completion of the secondary plan, vacant lots should be sold for purposes set out in the secondary plan and zoning by-law. The lands between Brougham Road and Brock Road should be made available for residential development once the secondary plan is completed.
- Other than residential development in Brougham, significant residential development is not recommended on the Pickering Federal Lands. If the Federal Government wants to consider significant housing development, it should be considered elsewhere in exchange for protecting Pickering Federal Lands for long-term agricultural and environmental purposes.
- Transport Canada should consider development of an economic corridor along the north side of Highway 7 as an expansion of the Pickering Innovation Corridor to the south of Highway 7. A broad range of high employment generating uses should be considered including industrial, institutional, health care, post-secondary and ancillary commercial to support employment uses. It is recommended that the Federal Government through Canada Lands Corporation be the developer of the lands including front ending the infrastructure required to

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implement the economic corridor and either sell lots or provide long-term leases. Development of the economic corridor should be phased to ensure other lands within Pickering designated for employment uses are developed first.

- Transport Canada should explore how to ensure the creation of a vibrant Agricultural System on the remaining Pickering Federal Lands where farmers are incentivized to invest in farm improvements, on-farm diversified uses and agricultural related uses. These lands could be included in an expanded Rouge National Urban Park provided the Federal Government provides long-term leases and incentives for farmers to invest in the lands. If the Federal Government plans to sell the lands to farmers, restrictions on the future use of the lands through an expanded Greenbelt Plan or land trust to ensure no future conversion or development pressures that would allow the lands to be removed from the agricultural system.
- Prior to Transport Canada transferring or selling any of the Pickering Federal Lands, significant road improvements should be undertaken. These include:
 - The Whites Road / Sideline 26 Realignment;
 - Country Lane / Sideline 20 Realignment;
 - Peter Matthews Drive / Sideline 22 Realignment;
 - Upgrading and paving of Seventh Concession to a Type B arterial Road standard;
 - Upgrading and paving of Sideline 20, Sideline 26 and Sideline 22 to an appropriate arterial Road standard; and
 - Upgrading all remaining rural roads including those within agricultural areas to an appropriate standard that can accommodate agricultural machinery traffic.
- Transport Canada should accommodate the widening of Highway 7 (between Ressor Road in Markham to Brock Road in Pickering) subject to the findings of the environmental assessment.
- Transport Canada should make lands available for a future (potential) station for the Alto High-Speed Rail.
- Once the roads are upgraded and improved, consideration should be given to transfer federally owned and maintained roads to City of Pickering.
- Transport Canada should work with Durham Region to coordinate water and wastewater servicing capacity and requirements for the economic corridor to support the proposed land uses. There remains an outstanding financial reimbursement due to the Region and Seaton Landowners for oversizing of

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water and sanitary sewer infrastructure to support development of the Pickering Federal Lands.

Once Pickering Council confirms the appropriate recommendations, this report should be forwarded to Transport Canada and the Federal Government as the City's formal input into this process and the future development of the Pickering Federal Lands.

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Appendix A



Pickering Federal Lands Fiscal Impact Analysis

Prepared By:
Parcel Economics Inc

May 14, 2026



Pickering Federal Lands

Economic & Fiscal Impact Analysis

May 14, 2026

Parcel

City of

PICKERING

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May 14, 2026

2025-0179

This document is available in alternative formats upon request.

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1.0

Economic & Fiscal Impact Modelling

1.1 Approach

We have quantified the following indicators to estimate the economic impact of the new industrial/employment development proposed in three land use options 1, 2 and 3. The economic and fiscal impacts modelled in this analysis include:

- One-time investment (i.e., hard and soft construction costs)
- Jobs
- City of Pickering Revenues
 - **Development Charges** (one-time)
 - **Building Permit Fees** (one-time)
 - **Annual Property Taxes** (ongoing)
 - **Other Non-Tax Revenues** (i.e., user fees, fines and other revenues) (ongoing)
- City of Pickering Costs
 - **Required Municipal Capital Projects** (one-time)
 - **Operational Costs to Service New Development** (i.e., road maintenance, provision of emergency services, etc.) (ongoing)

- **Incremental Operating Costs** (i.e., operating costs associated with new roads / stormwater located within the Pickering Federal Lands) (ongoing)
- **Lifecycle Capital Costs** (i.e., lifecycle costs to replace the incremental capital assets that are directly related to the proposed development)

It should be noted that all estimated revenues and expenses are stated in 2025 dollars and are assessed at the full build-out of the land use options.

Caveats & Limitations

We note the limitations of trying to quantify hypothetical economic impact more than 25 years into the future. It is almost certain that inputs used in this analysis will change between now and 2051. As such, the numbers presented herein are best interpreted as a comparison of the relative impact of each land use option based on current assumptions rather than a predictor of actual investment, jobs, and taxes.

We also note the number presented herein represents **net new** investment, jobs, revenues, and costs associated with **employment land designations**. We do not anticipate additional benefit to the City of Pickering from agricultural or Rouge National Urban Park ("RNUP") designations since these represent "status quo" use of the Pickering Federal Lands.

1.2 One-Time Investment

We have estimated the one-time construction-related investments required to realize employment land development for each land use option based on:

- The Altus Construction Cost Guide (2025) to estimate **hard costs** (e.g., costs directly related to the construction of new buildings, including material and labour costs), specifically assuming median costs for **warehouse** construction in the GTA (\$130 per square foot/); and,
- A high-level estimate of anticipated **soft costs** (e.g., costs indirectly related to construction and the preliminary planning / design / approvals stages of development, including architectural and engineering fees, consultant fees, government charges, etc.), assumed to be **30% of total development costs**.

Based on this assessment, we estimate that the land use options could result in a one-time investment ranging from **\$3.7 billion to \$5.3 billion**.

Figure 1.1
Land Use Options Construction Cost Investments

	Land Use Option 1	Land Use Option 2	Land Use Option 3
Employment Land	1,100 ha	810 ha	776 ha
Employment Gross Floor Area	2.6M SM	1.9M SM	1.9M SM
Investment (Construction Costs)	\$5.3 Billion	\$3.9 Billion	\$3.7 Billion
Hard Costs	\$3.7 Billion	\$2.7 Billion	\$2.6 Billion
Soft Costs	\$1.6 Billion	\$1.2 Billion	\$1.1 Billion

Source: Parcel, based on land use options prepared by SGL and 2025 Altus Construction Cost Guide.

1.3 Jobs

The number of potential jobs generated by the different land use options assume 116 square metres per job per the Durham DC Background report.

Based on this assessment, we estimate the land use option 1 to 3 could accommodate between **16,000 and 22,700 full-time equivalent (“FTE”) employment-related jobs**. It is difficult to predict what, if any, additional agricultural jobs would be created within expanded agricultural uses or the RNUP.

Figure 1.2
Land Use Options Job Estimates

	Land Use Option 1	Land Use Option 2	Land Use Option 3
Employment Land	1,100 ha	810 ha	776 ha
Employment Gross Floor Area	2.6M SM	1.9M SM	1.9M SM
Jobs	22,700 FTE	16,700 FTE	16,000 FTE

Source: Parcel, based on land use options prepared by SGL and Durham DC Background study.

1.4 Revenues

One-Time Revenue

Development of the Pickering Federal Lands will result in one-time revenues for the City of Pickering in the form of **development charges** and **building permits**.

Based on current development charges¹, full development of the Pickering Federal Lands is estimated to generate between **\$212.6M and \$301.9M** in development charges. In land use options 1 to 3, 70% of development charges are allocated for transportation services based on current development charge rates in the City. It is important to note that these estimates are based on current development charge rates. If new capital infrastructure projects are added to the capital program in future development charge by-laws, it could result in higher development charge rates, which would result in additional development charge revenue for the City to fund growth-related infrastructure costs.

Based on current building permit rates², full development of the Pickering Federal Lands is estimated to generate between **\$31.8M and \$45.1M** in building permit fees.

¹ \$114.42 per square metre based on City-wide development charges effective July 1, 2025 to June 30, 2026.

² \$17.10 per square metre based on Mercantile Occupancies "E" Classification (BPE1) single storey, effective January 6, 2026.

Ongoing (Operating) Revenue

Development of the Pickering Federal Lands will also result in the collection of **ongoing** revenues for the City of Pickering in the form of **property tax revenue** and other **non-tax revenue** (e.g., user fees, services charges, fines, penalties, etc.).

Property Taxes

Property tax revenues are based on 2025 City of Pickering tax rates³ and an estimated assessment value⁴ of \$1,135 per square metre, which represents the weighted average of MPAC assessment values of nearby industrial developments that could act as precedents for the type of employment development envisioned on the Pickering Federal Lands (Figure 1.3).

Figure 1.3

Assessed Values of Precedent Industrial Developments

Source	Address	Building Size sq. m.	Estimated Assessed Value	Assessed Value Per sq. m.
MPAC	2570 Tillings Road	2,937	\$4,355,000	\$1,483
MPAC	1055 Flagship Way	21,044	\$18,304,000	\$870
MPAC	1155 Kubota Dr	46,452	\$48,620,000	\$1,047
Industrial/Employment - Average				\$1,135

Source: Parcel, based on MPAC data.

Based on this assessment, we estimate total property tax revenue from the build-out of the lands could range from **\$16.7M to \$23.7M** for land use options 1 to 3. We note these numbers are **annual amounts** based on full build-out of the Pickering Federal Lands and 2025 tax rates. Actual tax revenues will vary as tax rates change up to and including the 2051 to 2071 development period contemplated and any phased development of the lands (i.e., likely to be built out over many years).

³ 0.00789916 for industrial uses.

⁴ January 1, 2016 assessment values per current *Assessment Act* freeze. Property taxes may be higher once taxation based on reassessment values is instated.

Non-Property Tax Revenues

Non-property tax revenues are based on the 2024 Financial Information Return (“FIR”) filed by the City of Pickering with the Ministry of Municipal Affairs and Housing (“MMAH”). Non-tax revenues are summarized by category (e.g., payments in lieu of taxes, grants, fines, penalties, etc.). Growth in non-tax revenue is based on Parcel assumptions for the portion of non-tax revenue that could increase in proportion to proposed employment growth on the Pickering Federal Lands. Generally speaking, we have assumed new jobs on the Pickering Federal Lands will generate the same user fees per employee as existing jobs in Pickering.

In total, non-property tax revenues range from **\$1.5M to \$2.2M**. These revenues are nominal on account of user fees and services charges being predominantly paid for by residents, not employees (e.g., a Pickering resident is more likely to use a recreation centre than someone who only works in Pickering).

Combined, land use options for the Pickering Federal Lands will result in ongoing annual revenues for the City of Pickering ranging from **\$18.2M to \$25.8M**, assuming no change to property taxes or non-property tax revenue rates.

Figure 1.4

Land Use Options One-Time & Ongoing Revenues

	Land Use Option 1	Land Use Option 2	Land Use Option 3
Employment Land	1,100 ha	810 ha	776 ha
Employment Gross Floor Area	2.6M SM	1.9M SM	1.9M SM
One-Time Revenue	\$347.0M	\$255.4M	\$244.4M
Development Charges	\$301.9M	\$222.2M	\$212.6M
Building Permits	\$45.1M	\$33.2M	\$31.8M
Ongoing (Operating) Revenue	\$25.8M	\$19.0M	\$18.2M
Property Tax	\$23.7M	\$17.4M	\$16.7M
Non-Property Tax	\$2.2M	\$1.6M	\$1.5M

Source: Parcel, based on land use options prepared by SGL and current City of Pickering fees and taxes.

1.5 Costs

Infrastructure

A high-level summary of the municipal infrastructure⁵ associated with the proposed land use options 1 to 3 is provided in Figure 1.5 below, including the quantum of roadways and stormwater mains that must be constructed, operated, maintained, and eventually replaced by the City of Pickering to service land use options 1 to 3, as proposed. It is assumed that capital costs for new infrastructure are funded through development charges. If subsequent changes are made to the existing land use or concept plans, the estimate will need to be refined accordingly.

Given the land use concepts primarily contemplate development via employment uses, an estimate of community infrastructure (e.g., recreation centres, libraries, fire halls, etc.) has not been included, except for the parks contemplated in land use options 1 to 3.

Figure 1.5

Land Use Options High-Level Municipal Infrastructure Summary

	Land Use Option 1	Land Use Option 2	Land Use Option 3
Infrastructure			
Roadways	89.0 lane km	74.0 lane km	74.0 lane km
Urban Storm Sewer	40.1 lane km	32.6 lane km	32.6 lane km
Parks	8 ha	30 ha	30 ha

Source: Parcel based on information provided by Dillon Consulting Ltd. This provides a high-level summary of infrastructure on the subject lands only.

⁵ Water and wastewater infrastructure are the responsibility of Durham Region and have been excluded from this analysis.

Municipal Operating Costs

To estimate ongoing operational costs that could be incurred by the City due to the development of the Pickering Federal Lands, we have estimated total costs affiliated with municipal-wide operation, which have been estimated on a per resident and per employee basis and operating expenditures taken from Schedule 40 in the FIR.

For this analysis, we have deducted interest on long-term debt, external transfers and amortization from total expenditures to arrive at net operating expenditures. Debt charges have been removed because these charges are for “sunk” investments and are unaffected by growth. Similarly, external transfers are not directly linked to the services that will be provided on the Pickering Federal Lands. For amortization, this reflects the depreciation of historical costs and have been calculated separately as life-cycle replacement costs elsewhere in this analysis. These adjusted operating expenditures have then been allocated between residential and non-residential sectors based on existing population and employment.

After allocating adjusted operating expenditures between the residential and non-residential sectors, we have estimated the degree to which adjusted operating expenditures will change with additional growth, by applying a **“growth-related”** factor. In some cases, this growth-related factor recognizes that there would be proportionate increases in operating costs relative to the operating expenditures being incurred by the City to provide services to existing residents and employees (i.e. a 100% growth factor), while in other cases a small allowance is made for efficiencies and economies of scale. There are some services, such as general government, planning and development and solid waste collection where costs will likely grow at a slower pace than population or employment growth, as there are greater opportunities for economies of scale. The following table summarizes the various growth-related factors assigned in our analysis.

Figure 1.6

Municipal Operating Costs Growth Assumptions

Growth Related Factor	Rationale
50%	Service areas where there are assumed to be significant economies of scale, as additional community infrastructure is not anticipated to accommodate new growth.
75%	There are assumed to be some economies of scale through more efficient use of existing infrastructure.
100%	Where new community infrastructure is proposed within the Pickering Federal Lands and not estimated separately through site-specific operating costs, there are anticipated to be a proportionate increase in per capita operating costs.

Source: Parcel.

In total, non-residential operating costs are estimated to be between **\$7.6M and \$10.8M**, depending on the land use option.

Annual Operating Costs for New Site-Specific Infrastructure

This analysis also includes the costs of operating and maintaining infrastructure that is internal to the Pickering Federal Lands, including infrastructure such as roads and water distribution.

For purposes of this analysis, operating and maintenance costs from the 2024 FIR for Paved Roads, Winter Control Costs, Urban Storm Sewer System, and Parks have been used. The operating costs were then divided by the quantity of infrastructure maintained by the municipality currently to determine the operating costs per unit. These annual per rate units have then been applied to the infrastructure anticipated as part of the Pickering Federal Lands, with estimates summarized in Figure 1.7.

Operating costs are estimated to be between approximately **\$0.8M and \$1.6M** per year depending on full build-out of the land use options.

Figure 1.7
On-Site Operating & Maintenance Costs per Unit

	Operating Costs (Excludes Amortization and Long-Term Debt)	Units	Cost Per Unit (2024 dollars)	Cost Per Unit (2025 dollars)
Paved Roads	\$2,458,941	793 Paved Lane KM	\$3,101	\$3,163
Winter Control - Roads	\$895,766	984 Lane KM Maintained in Winter	\$910	\$929
Urban Storm Sewer System	\$2,043,295	698.0 KM of Urban Drainage System	\$2,927	\$2,986
Parks	\$6,081,500	161.1 Ha of Parkland	\$37,749	\$38,504

Source: Parcel based on City of Pickering's 2024 Financial Information Return. Operating costs include: Salaries, Wages and Employee Benefits, Materials, Contracted Services, Rents and Financial Expenses and Transfers.

Capital Lifecycle Replacement Costs for Site-Specific Infrastructure

In addition to annual operating costs associated with new site-specific infrastructure, our analysis also includes lifecycle capital costs to replace infrastructure at the end of its estimated useful life. Replacement costs per unit and the estimated useful life of various infrastructure are based on information included in the City of Pickering's Asset Management Plan 2025.

As phasing of development of the Pickering Federal Lands is not currently known, we have calculated total lifecycle replacement costs assuming all infrastructure will be developed and conveyed at the same time. These annual lifecycle replacement costs are estimated to be between approximately **\$5.8M and \$6.6M**.

Figure 1.8

Land Use Options Costs

	Land Use Option 1	Land Use Option 2	Land Use Option 3
Employment Land	1,100 ha	810 ha	776 ha
Employment Gross Floor Area	2.6M SM	1.9M SM	1.9M SM
Ongoing (Operating) Costs	\$18.2M	\$15.3M	\$14.9M
Non-Residential Operating Costs	\$10.8M	\$7.9M	\$7.6M
Site Specific Infrastructure Operating Costs	\$0.8M	\$1.6M	\$1.6M
Site Specific Lifecycle Replacement Costs	\$6.6M	\$5.8M	\$5.8M

Source: Parcel, based on land use options prepared by SGL, infrastructure estimates prepared by Dillon Consulting Ltd., City of Pickering Financial Information Return, and City of Pickering Asset Management Plan.

1.6 Net Municipal Operating Impact

To estimate the net operating impact associated with the build-out of the Pickering Federal Lands, Parcel has compared forecast municipal revenues that could be generated via development against estimated operating costs that could be incurred by the City of Pickering.

Based on estimated revenues and operating costs, the land use options 1 to 3 are anticipated to have a net positive financial benefit to the City of Pickering ranging from **\$3.3M to \$7.6M**. This is largely related to significant revenues compared to operating costs associated with non-residential development.

Figure 1.9

Land Use Options Net Municipal Operating Impact

	Land Use Option 1	Land Use Option 2	Land Use Option 3
Employment Land	1,100 ha	810 ha	776 ha
Employment Gross Floor Area	2.6M SM	1.9M SM	1.9M SM
One-Time Revenue	\$347.0M	\$255.4M	\$244.4M
Ongoing (Operating) Revenue	\$25.8M	\$19.0M	\$18.2M
Ongoing (Operating) Costs	\$18.2M	\$15.3M	\$14.9M
Net Operating Impact	\$7.6M	\$3.8M	\$3.3M

Source: Parcel. Net operating impact totals may not add due to rounding.

1.7 Summary

Overall, land use option 1 generates the greatest investment, jobs, and revenues, followed by land use option 2 and land use option 3. However, we note Option 1 outcomes assume the Pickering Federal Lands absorb all employment land demand for Durham Region post-2051. Some of this demand is likely to be accommodated in other Durham Region municipalities.

Figure 1.10

Economic Impact of Land Use Options Summary

	Land Use Option 1	Land Use Option 2	Land Use Option 3
Employment Land	1,100 ha	810 ha	776 ha
Employment Gross Floor Area	2.6M SM	1.9M SM	1.9M SM
Investment (Construction Costs)	\$5.3 Billion	\$3.9 Billion	\$3.7 Billion
Hard Costs	\$3.7 Billion	\$2.7 Billion	\$2.6 Billion
Soft Costs	\$1.6 Billion	\$1.2 Billion	\$1.1 Billion
Jobs	22,700 FTE	16,700 FTE	16,000 FTE
One-Time Revenue	\$347.0M	\$255.4M	\$244.4M
Development Charges	\$301.9M	\$222.2M	\$212.6M
Building Permits	\$45.1M	\$33.2M	\$31.8M
Ongoing (Operating) Revenue	\$25.8M	\$19.0M	\$18.2M
Property Tax	\$23.7M	\$17.4M	\$16.7M
Non-Property Tax	\$2.2M	\$1.6M	\$1.5M
Ongoing (Operating) Costs	\$18.2M	\$15.3M	\$14.9M
Non-Residential Operating Costs	\$10.8M	\$7.9M	\$7.6M
Site Specific Infrastructure Operating Costs	\$0.8M	\$1.6M	\$1.6M
Site Specific Lifecycle Replacement Costs	\$6.6M	\$5.8M	\$5.8M
Net Operating Impact	\$7.6M	\$3.8M	\$3.3M

Source: Parcel.



Parcel

Appendix A:

Land Use Option 1

One-Time Revenues

Figure A. 1

Development Charge Revenue

Development Charges Revenue	2025
Industrial/Employment	\$301,892,000
Total Development Charge Revenue	\$301,892,000

Figure A. 2

Building Permit Revenue (per sq. m.)

	2025
Industrial/Employment	\$45,117,476
TOTAL - Fee Per sq. m.	\$45,117,476

Non-Tax Revenues & Cost Assumptions

Figure A. 3

Non-Tax Revenue Assumptions per Resident & Employee

	2024 Non-Tax Revenue	Residential Share	Non-Residential Share	Growth Share	2024 Non-Tax Revenue Per Capita	2025 Non-Tax Revenue Per Capita	2024 Non-Tax Revenue Per Employee	2025 Non-Tax Revenue Per Employee
User Fees and Service Charges								
General government	\$1,228,049	78%	22%	100%	\$8.11	\$8.27	\$8.11	\$8.27
Protection services								
Fire	\$57,009	78%	22%	100%	\$0.38	\$0.38	\$0.38	\$0.38
Police	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Court Security	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Prisoner Transportation	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Conservation authority	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Protective inspection and control	\$4,351,043	78%	22%	100%	\$28.73	\$29.31	\$28.73	\$29.31
Building permit and inspection services	\$47,174	78%	22%	100%	\$0.31	\$0.32	\$0.31	\$0.32
Emergency measures	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Provincial Offences Act (POA)	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Protection services	\$4,455,226					\$30.01		\$30.01
Transportation services								
Roads - Paved	\$221,277	78%	22%	100%	\$1.46	\$1.49	\$1.46	\$1.49
Roads - Unpaved	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Roads - Bridges and Culverts	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Roads - Traffic Operations & Roadside	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Winter Control - Except sidewalks, Parking Lots	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Winter Control - Sidewalks, Parking Lots Only	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Transit - Conventional	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Transit - Disabled & special needs	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Parking	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Street lighting	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Air transportation	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$8,848	78%	22%	100%	\$0.06	\$0.06	\$0.06	\$0.06
Sub-Total - Transportation services	\$230,125					\$1.55		\$1.55
Environmental services - Excluding Water and Wastewater								
Urban storm sewer system	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Rural storm sewer system	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Solid waste collection	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Solid waste disposal	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Waste diversion	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Environmental services - Excluding Water and	\$0					\$0.00		\$0.00
Health services								
Public health services	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Hospitals	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Ambulance services	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Ambulance dispatch	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Cemeteries	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Health services	\$0					\$0.00		\$0.00
Social and family services								
General assistance	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Assistance to aged persons	\$86,540	100%	0%	100%	\$0.73	\$0.75	\$0.00	\$0.00
Child care	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Social and family services	\$86,540					\$0.75		\$0.00
Social Housing								
Public Housing	\$0	100%			\$0.00	\$0.00	\$0.00	\$0.00
Non - Profit/Cooperative Housing	\$0	100%			\$0.00	\$0.00	\$0.00	\$0.00
Rent Supplement Programs	\$0	100%			\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0	100%			\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0	100%			\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Social Housing	\$0					\$0.00		\$0.00
Recreation and cultural services								
Parks	\$71,379	95%	5%	100%	\$0.57	\$0.58	\$0.11	\$0.11
Recreation programs	\$2,997,345	95%	5%	100%	\$24.05	\$24.54	\$4.53	\$4.62
Recreation facilities - Golf Course, Marina, Ski Hill	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Recreation facilities - All Other	\$4,291,567	95%	5%	100%	\$34.44	\$35.13	\$6.49	\$6.62
Libraries	\$54,775	95%	5%	100%	\$0.44	\$0.45	\$0.08	\$0.08
Museums	\$159,059	95%	5%	100%	\$1.28	\$1.30	\$0.24	\$0.25
Cultural services	\$15,307	95%	5%	100%	\$0.12	\$0.13	\$0.02	\$0.02
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Recreation and cultural services	\$7,589,432					\$62.12		\$11.71

	2024 Non-Tax Revenue	Residential Share	Non-Residential Share	Growth Share	2024 Non-Tax Revenue Per Capita	2025 Non-Tax Revenue Per Capita	2024 Non-Tax Revenue Per Employee	2025 Non-Tax Revenue Per Employee
Planning and development								
Planning and zoning	\$2,001,834	78%	22%	100%	\$13.22	\$13.48	\$13.22	\$13.48
Commercial and industrial	\$0		100%		\$0.00	\$0.00	\$0.00	\$0.00
Residential development	\$0	100%			\$0.00	\$0.00	\$0.00	\$0.00
Agriculture and reforestation	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Tile drainage/shoreline assistance	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Planning and development	\$2,001,834					\$13.48		\$13.48
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - User Fees and Service Charges	\$15,591,206					\$116.18		\$65.02
Licences, permits, rents, etc								
Trailer revenue and permits	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Licences and permits	\$1,293,718	78%	22%	100%	\$8.54	\$8.71	\$8.54	\$8.71
Rents, concessions and franchises	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Royalties	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Green Energy	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Licences, permits, rents, etc	\$5,706,206					\$8.71		\$8.71
Fines and penalties								
Provincial Offences Act (POA) Municipality which admin	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other fines	\$1,704,191	78%	22%	100%	\$11.25	\$11.48	\$11.25	\$11.48
Penalties and interest on taxes	\$3,540,621	90%	10%	100%	\$26.92	\$27.46	\$10.71	\$10.92
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Fines and penalties	\$5,244,812					\$38.94		\$22.40
Other revenue								
Investment income	\$7,090,442	78%	22%	0%	\$0.00	\$0.00	\$0.00	\$0.00
Interest earned on reserves and reserve funds	\$2,561,719	78%	22%	0%	\$0.00	\$0.00	\$0.00	\$0.00
Gain/Loss on sale of land & capital assets	-\$69,200	78%	22%	0%	\$0.00	\$0.00	\$0.00	\$0.00
Deferred revenue earned (Development Charges) (SLC t	\$8,775,167	78%	22%	0%	\$0.00	\$0.00	\$0.00	\$0.00
Deferred revenue earned (Recreational land (The Planni	\$985,196	78%	22%	0%	\$0.00	\$0.00	\$0.00	\$0.00
Other Deferred revenue earned	\$226,644	78%	22%	0%	\$0.00	\$0.00	\$0.00	\$0.00
Donations	\$78,296	78%	22%	0%	\$0.00	\$0.00	\$0.00	\$0.00
Donated Tangible Capital Assets (SLC 53 0610 01)	\$935,996	78%	22%	0%	\$0.00	\$0.00	\$0.00	\$0.00
Sale of publications, equipment, etc	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Contributions from non-consolidated entities	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other Revenues from Government Business Enterprise (i	\$1,035,350	78%	22%	0%	\$0.00	\$0.00	\$0.00	\$0.00
Gaming and Casino Revenues	\$17,451,454	78%	22%	0%	\$0.00	\$0.00	\$0.00	\$0.00
Other	\$2,493,788	78%	22%	0%	\$0.00	\$0.00	\$0.00	\$0.00
Other	\$46,200	78%	22%	0%	\$0.00	\$0.00	\$0.00	\$0.00
Other	\$1,895,408	78%	22%	0%	\$0.00	\$0.00	\$0.00	\$0.00
Other	\$81,278	78%	22%	0%	\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Other revenue	\$43,587,738					\$0.00		\$0.00

Figure A. 4

Non-Tax Cost Assumptions per Resident & Employee

	Total Expenses (Excluding Long-Term Debt & Amortization)	Residential Share	Non-Residential Share	Estimated Growth Impact	Per Capita		Per Employee	
					2024 Expenses	2025 Expenses	2024 Expenses	2025 Expenses
General government								
Governance	\$2,089,346	78%	22%	50%	\$6.90	\$7.04	\$6.90	\$7.04
Corporate Management	\$9,510,050	78%	22%	50%	\$31.40	\$32.03	\$31.40	\$32.03
Program Support	\$20,468,430	78%	22%	50%	\$67.58	\$68.93	\$67.58	\$68.93
Sub-Total - General government	\$32,067,826					\$108.00		\$108.00
Protection services								
Fire	\$24,305,091	78%	22%	100%	\$160.50	\$163.71	\$160.50	\$163.71
Police	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Court Security	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Prisoner Transportation	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Conservation authority	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Protective inspection and control	\$8,778,907	78%	22%	100%	\$57.97	\$59.13	\$57.97	\$59.13
Building permit and inspection services	\$2,946,356	78%	22%	75%	\$14.59	\$14.88	\$14.59	\$14.88
Emergency measures	\$185,704				\$0.00	\$0.00	\$0.00	\$0.00
Provincial Offences Act (POA)	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Protection services	\$36,216,058					\$237.72		\$237.72
Transportation services								
Roads - Paved	\$2,183,471	78%	22%	50%	\$7.21	\$7.35	\$7.21	\$7.35
Roads - Unpaved	\$1,230,886	78%	22%	50%	\$4.06	\$4.15	\$4.06	\$4.15
Roads - Bridges and Culverts	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Roads - Traffic Operations & Roadside	\$2,768,211	78%	22%	50%	\$9.14	\$9.32	\$9.14	\$9.32
Winter Control - Except sidewalks, Parking Lots	\$895,766	78%	22%	50%	\$2.96	\$3.02	\$2.96	\$3.02
Winter Control - Sidewalks, Parking Lots Only	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Transit - Conventional	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Transit - Disabled & special needs	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Parking	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Street lighting	\$879,337	78%	22%	50%	\$2.90	\$2.96	\$2.90	\$2.96
Air transportation	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$4,856,049	78%	22%	100%	\$32.07	\$32.71	\$32.07	\$32.71
Sub-Total - Transportation services	\$12,813,720					\$59.51		\$59.51
Environmental services - Excluding Water and Wastewater								
Urban storm sewer system	\$493,314	78%	22%	50%	\$1.63	\$1.66	\$1.63	\$1.66
Rural storm sewer system	\$1,542,475	78%	22%	50%	\$5.09	\$5.19	\$5.09	\$5.19
Solid waste collection	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Solid waste disposal	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Waste diversion	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Environmental services - Excluding Water and Wastewater	\$2,035,789					\$6.86		\$6.86
Health services								
Public health services	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Hospitals	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Ambulance services	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Ambulance dispatch	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Cemeteries	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Health services	\$0					\$0.00		\$0.00

	Total Expenses (Excluding Long-Term Debt & Amortization)	Residential Share	Non-Residential Share	Estimated Growth Impact	Per Capita		Per Employee	
					2024 Expenses	2025 Expenses	2024 Expenses	2025 Expenses
Social and family services								
General assistance	\$456,102	100%		100%	\$3.85	\$3.93	\$0.00	\$0.00
Assistance to aged persons	\$640,576	100%		100%	\$5.41	\$5.52	\$0.00	\$0.00
Child care	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Social and family services	\$1,096,678					\$9.45		\$0.00
Social Housing								
Public Housing	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Non-Profit/Cooperative Housing	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Rent Supplement Programs	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Social Housing	\$0					\$0.00		\$0.00
Recreation and cultural services								
Parks	\$6,063,133	95%	5%	75%	\$36.49	\$37.22	\$6.88	\$7.01
Recreation programs	\$6,966,691	95%	5%	75%	\$41.93	\$42.77	\$7.90	\$8.06
Rec Fac - Golf Crs, Marina, Ski Hill	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Rec Fac - All Other	\$10,326,397	95%	5%	75%	\$62.15	\$63.40	\$11.71	\$11.95
Libraries	\$6,332,529	95%	5%	75%	\$38.11	\$38.88	\$7.18	\$7.33
Museums	\$1,777,974	95%	5%	75%	\$10.70	\$10.92	\$2.02	\$2.06
Cultural services	\$876	95%	5%	75%	\$0.01	\$0.01	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Recreation and cultural services	\$31,467,600					\$193.19		\$36.41
Planning and development								
Planning and zoning	\$5,028,479	78%	22%	75%	\$24.90	\$25.40	\$24.90	\$25.40
Commercial and Industrial	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Residential development	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Agriculture and reforestation	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Title drainage/shoreline assistance	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Planning and development	\$5,028,479					\$25.40		\$25.40
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00

Ongoing Revenue

Figure A. 5

Property Tax Revenues

	2025
Industrial/Employment	\$23,655,136
TOTAL - Property Tax Revenue	\$23,655,136

Figure A. 6

Non-Property Tax Revenues per Employee

Non-Residential Non-Tax Revenue	2025
<i>User Fees and Service Charges</i>	
General government	\$187,927.06
Protection services	\$681,778.61
Transportation services	\$35,215.79
Recreation and cultural services	\$266,002.02
Planning and development	\$306,338.58
Other	\$0.00
Licences, permits, rents, etc	\$197,976.32
Fines and penalties	\$508,981.04
Other revenue	\$0.00
Pickering - Non-Residential Non-Tax Revenue	\$2,184,219

Ongoing Costs

Figure A. 7
Municipal-Wide Operating Costs, per Employee

	2025
General government	\$2,453,653
Protection services	\$5,400,968
Transportation services	\$1,351,993
Environmental services - Excluding Water and Wastewater	\$155,767
Recreation and cultural services	\$827,181
Planning and development	\$577,127
Other	\$0
Pickering Non-Residential Town-Wide	\$10,766,690

Figure A. 8
Site-Specific Operating Costs

	2025
Paved Roads	\$281,000
Winter Control - Roads	\$83,000
Urban Storm Sewer System	\$120,000
Parks	\$308,000
Total	\$792,000

Replacement Cost Assumptions

Figure A. 9

Replacement Costs & Estimated Useful Life

	Units	Cost Per Unit	Estimated Service Life (Years)	Average Annual Cost (\$/Year/Unit)	Phase 1	2025
Roads						
Collector Road	metres	\$3,200	50	\$64	89,000	\$5,696,000
Stormwater						
Storm Mains	metres	\$1,200	72	\$17	40,140	\$669,000
Maintenance Holes	each	\$9,700	72	\$135	630	\$84,875
Oil Grit Separators	each	\$129,400	72	\$1,797	7	\$12,504
Catch Basin and Lead	each	\$4,100	72	\$57	1,040	\$59,222
Service Connection	each	\$600	72	\$8	3,175	\$26,458
Parks						
Playground Equipment	each	\$78,800	45	\$1,751	4	\$7,004
Buildings	each	\$190,900	45	\$4,242	2	\$8,484
Electrical / Lighting	each	\$20,600	45	\$458	27	\$12,360
Site Furniture	each	\$3,500	45	\$78	22	\$1,711
Site Structures	each	\$18,200	45	\$404	30	\$12,133
Subsurface Infrastructure	each	\$14,900	45	\$331	8	\$2,649
Parking lots and Internal Roads	per metre	\$100	25	\$4	2,548	\$10,192
Pedestrian Corridors	per metre	\$200	25	\$8	4,688	\$37,504
TOTAL - SITE SPECIFIC REPLACEMENT COSTS						\$6,640,000

Appendix B:

**Fiscal Impact Modelling:
Land Use Option 2**

One-Time Revenues

Figure B. 1

Development Charge Revenue

	2025
Industrial/Employment	\$222,167,000
Total Development Charge Revenue	\$222,167,000

Figure B. 2

Building Permit Revenue (per sq. m.)

	2025
Industrial/Employment	\$33,202,650
TOTAL - Fee Per sq. m.	\$33,202,650

Non-Tax Revenues & Cost Assumptions

Figure B. 3

Non-Tax Revenue Assumptions per Resident & Employee

	2024 Non-Tax Revenue	Residential Share	Non-Residential Share	Growth Share	2024 Non-Tax Revenue Per Capita	2025 Non-Tax Revenue Per Capita	2024 Non-Tax Revenue Per Employee	2025 Non-Tax Revenue Per Employee
User Fees and Service Charges								
General government	\$1,228,049	78%	22%	100%	\$8.11	\$8.27	\$8.11	\$8.27
Protection services								
Fire	\$57,009	78%	22%	100%	\$0.38	\$0.38	\$0.38	\$0.38
Police	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Court Security	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Prisoner Transportation	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Conservation authority	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Protective inspection and control	\$4,351,043	78%	22%	100%	\$28.73	\$29.31	\$28.73	\$29.31
Building permit and inspection services	\$47,174	78%	22%	100%	\$0.31	\$0.32	\$0.31	\$0.32
Emergency measures	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Provincial Offences Act (POA)	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Protection services	\$4,455,226					\$30.01		\$30.01
Transportation services								
Roads - Paved	\$221,277	78%	22%	100%	\$1.46	\$1.49	\$1.46	\$1.49
Roads - Unpaved	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Roads - Bridges and Culverts	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Roads - Traffic Operations & Roadside	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Winter Control - Except sidewalks, Parking Lots	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Winter Control - Sidewalks, Parking Lots Only	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Transit - Conventional	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Transit - Disabled & special needs	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Parking	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Street lighting	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Air transportation	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$8,848	78%	22%	100%	\$0.06	\$0.06	\$0.06	\$0.06
Sub-Total - Transportation services	\$230,125					\$1.55		\$1.55
Environmental services - Excluding Water and Wastewater								
Urban storm sewer system	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Rural storm sewer system	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Solid waste collection	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Solid waste disposal	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Waste diversion	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Environmental services - Excluding Water and	\$0					\$0.00		\$0.00
Health services								
Public health services	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Hospitals	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Ambulance services	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Ambulance dispatch	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Cemeteries	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Health services	\$0					\$0.00		\$0.00
Social and family services								
General assistance	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Assistance to aged persons	\$86,540	100%	0%	100%	\$0.73	\$0.75	\$0.00	\$0.00
Child care	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Social and family services	\$86,540					\$0.75		\$0.00
Social Housing								
Public Housing	\$0	100%			\$0.00	\$0.00	\$0.00	\$0.00
Non - Profit/Cooperative Housing	\$0	100%			\$0.00	\$0.00	\$0.00	\$0.00
Rent Supplement Programs	\$0	100%			\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0	100%			\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0	100%			\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Social Housing	\$0					\$0.00		\$0.00
Recreation and cultural services								
Parks	\$71,379	95%	5%	100%	\$0.57	\$0.58	\$0.11	\$0.11
Recreation programs	\$2,997,345	95%	5%	100%	\$24.05	\$24.54	\$4.53	\$4.62
Recreation facilities - Golf Course, Marina, Ski Hill	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Recreation facilities - All Other	\$4,291,567	95%	5%	100%	\$34.44	\$35.13	\$6.49	\$6.62
Libraries	\$54,775	95%	5%	100%	\$0.44	\$0.45	\$0.08	\$0.08
Museums	\$159,059	95%	5%	100%	\$1.28	\$1.30	\$0.24	\$0.25
Cultural services	\$15,307	95%	5%	100%	\$0.12	\$0.13	\$0.02	\$0.02
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Recreation and cultural services	\$7,589,432					\$62.12		\$11.71

	2024 Non-Tax Revenue	Residential Share	Non-Residential Share	Growth Share	2024 Non-Tax Revenue Per Capita	2025 Non-Tax Revenue Per Capita	2024 Non-Tax Revenue Per Employee	2025 Non-Tax Revenue Per Employee
Planning and development								
Planning and zoning	\$2,001,834	78%	22%	100%	\$13.22	\$13.48	\$13.22	\$13.48
Commercial and industrial	\$0		100%		\$0.00	\$0.00	\$0.00	\$0.00
Residential development	\$0	100%			\$0.00	\$0.00	\$0.00	\$0.00
Agriculture and reforestation	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Tile drainage/shoreline assistance	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Planning and development	\$2,001,834					\$13.48		\$13.48
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - User Fees and Service Charges	\$15,591,206					\$116.18		\$65.02
Licences, permits, rents, etc								
Trailer revenue and permits	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Licences and permits	\$1,293,718	78%	22%	100%	\$8.54	\$8.71	\$8.54	\$8.71
Rents, concessions and franchises	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Royalties	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Green Energy	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Licences, permits, rents, etc	\$5,706,206					\$8.71		\$8.71
Fines and penalties								
Provincial Offences Act (POA) Municipality which admin	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other fines	\$1,704,191	78%	22%	100%	\$11.25	\$11.48	\$11.25	\$11.48
Penalties and interest on taxes	\$3,540,621	90%	10%	100%	\$26.92	\$27.46	\$10.71	\$10.92
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Fines and penalties	\$5,244,812					\$38.94		\$22.40
Other revenue								
Investment income	\$7,090,442	78%	22%	0%	\$0.00	\$0.00	\$0.00	\$0.00
Interest earned on reserves and reserve funds	\$2,561,719	78%	22%	0%	\$0.00	\$0.00	\$0.00	\$0.00
Gain/Loss on sale of land & capital assets	-\$69,200	78%	22%	0%	\$0.00	\$0.00	\$0.00	\$0.00
Deferred revenue earned (Development Charges) (SLC t	\$8,775,167	78%	22%	0%	\$0.00	\$0.00	\$0.00	\$0.00
Deferred revenue earned (Recreational land (The Planni	\$985,196	78%	22%	0%	\$0.00	\$0.00	\$0.00	\$0.00
Other Deferred revenue earned	\$226,644	78%	22%	0%	\$0.00	\$0.00	\$0.00	\$0.00
Donations	\$78,296	78%	22%	0%	\$0.00	\$0.00	\$0.00	\$0.00
Donated Tangible Capital Assets (SLC 53 0610 01)	\$935,996	78%	22%	0%	\$0.00	\$0.00	\$0.00	\$0.00
Sale of publications, equipment, etc	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Contributions from non-consolidated entities	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other Revenues from Government Business Enterprise (i	\$1,035,350	78%	22%	0%	\$0.00	\$0.00	\$0.00	\$0.00
Gaming and Casino Revenues	\$17,451,454	78%	22%	0%	\$0.00	\$0.00	\$0.00	\$0.00
Other	\$2,493,788	78%	22%	0%	\$0.00	\$0.00	\$0.00	\$0.00
Other	\$46,200	78%	22%	0%	\$0.00	\$0.00	\$0.00	\$0.00
Other	\$1,895,408	78%	22%	0%	\$0.00	\$0.00	\$0.00	\$0.00
Other	\$81,278	78%	22%	0%	\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Other revenue	\$43,587,738					\$0.00		\$0.00

Figure B. 4

Non-Tax Cost Assumptions per Resident & Employee

	Total Expenses (Excluding Long-Term Debt & Amortization)	Residential Share	Non-Residential Share	Estimated Growth Impact	Per Capita		Per Employee	
					2024 Expenses	2025 Expenses	2024 Expenses	2025 Expenses
General government								
Governance	\$2,089,346	78%	22%	50%	\$6.90	\$7.04	\$6.90	\$7.04
Corporate Management	\$9,510,050	78%	22%	50%	\$31.40	\$32.03	\$31.40	\$32.03
Program Support	\$20,468,430	78%	22%	50%	\$67.58	\$68.93	\$67.58	\$68.93
Sub-Total - General government	\$32,067,826					\$108.00		\$108.00
Protection services								
Fire	\$24,305,091	78%	22%	100%	\$160.50	\$163.71	\$160.50	\$163.71
Police	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Court Security	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Prisoner Transportation	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Conservation authority	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Protective inspection and control	\$8,778,907	78%	22%	100%	\$57.97	\$59.13	\$57.97	\$59.13
Building permit and inspection services	\$2,946,356	78%	22%	75%	\$14.59	\$14.88	\$14.59	\$14.88
Emergency measures	\$185,704				\$0.00	\$0.00	\$0.00	\$0.00
Provincial Offences Act (POA)	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Protection services	\$36,216,058					\$237.72		\$237.72
Transportation services								
Roads - Paved	\$2,183,471	78%	22%	50%	\$7.21	\$7.35	\$7.21	\$7.35
Roads - Unpaved	\$1,230,886	78%	22%	50%	\$4.06	\$4.15	\$4.06	\$4.15
Roads - Bridges and Culverts	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Roads - Traffic Operations & Roadside	\$2,768,211	78%	22%	50%	\$9.14	\$9.32	\$9.14	\$9.32
Winter Control - Except sidewalks, Parking Lots	\$895,766	78%	22%	50%	\$2.96	\$3.02	\$2.96	\$3.02
Winter Control - Sidewalks, Parking Lots Only	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Transit - Conventional	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Transit - Disabled & special needs	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Parking	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Street lighting	\$879,337	78%	22%	50%	\$2.90	\$2.96	\$2.90	\$2.96
Air transportation	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$4,856,049	78%	22%	100%	\$32.07	\$32.71	\$32.07	\$32.71
Sub-Total - Transportation services	\$12,813,720					\$59.51		\$59.51
Environmental services - Excluding Water and Wastewater								
Urban storm sewer system	\$493,314	78%	22%	50%	\$1.63	\$1.66	\$1.63	\$1.66
Rural storm sewer system	\$1,542,475	78%	22%	50%	\$5.09	\$5.19	\$5.09	\$5.19
Solid waste collection	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Solid waste disposal	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Waste diversion	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Environmental services - Excluding Water and Wastewater	\$2,035,789					\$6.86		\$6.86
Health services								
Public health services	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Hospitals	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Ambulance services	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Ambulance dispatch	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Cemeteries	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Health services	\$0					\$0.00		\$0.00

	Total Expenses (Excluding Long-Term Debt & Amortization)	Residential Share	Non-Residential Share	Estimated Growth Impact	Per Capita		Per Employee	
					2024 Expenses	2025 Expenses	2024 Expenses	2025 Expenses
Social and family services								
General assistance	\$456,102	100%		100%	\$3.85	\$3.93	\$0.00	\$0.00
Assistance to aged persons	\$640,576	100%		100%	\$5.41	\$5.52	\$0.00	\$0.00
Child care	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Social and family services	\$1,096,678					\$9.45		\$0.00
Social Housing								
Public Housing	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Non-Profit/Cooperative Housing	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Rent Supplement Programs	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Social Housing	\$0					\$0.00		\$0.00
Recreation and cultural services								
Parks	\$6,063,133	95%	5%	75%	\$36.49	\$37.22	\$6.88	\$7.01
Recreation programs	\$6,966,691	95%	5%	75%	\$41.93	\$42.77	\$7.90	\$8.06
Rec Fac - Golf Crs, Marina, Ski Hill	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Rec Fac - All Other	\$10,326,397	95%	5%	75%	\$62.15	\$63.40	\$11.71	\$11.95
Libraries	\$6,332,529	95%	5%	75%	\$38.11	\$38.88	\$7.18	\$7.33
Museums	\$1,777,974	95%	5%	75%	\$10.70	\$10.92	\$2.02	\$2.06
Cultural services	\$876	95%	5%	75%	\$0.01	\$0.01	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Recreation and cultural services	\$31,467,600					\$193.19		\$36.41
Planning and development								
Planning and zoning	\$5,028,479	78%	22%	75%	\$24.90	\$25.40	\$24.90	\$25.40
Commercial and Industrial	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Residential development	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Agriculture and reforestation	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Title drainage/shoreline assistance	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Planning and development	\$5,028,479					\$25.40		\$25.40
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00

Ongoing Revenue

Figure B. 5

Property Tax Revenues

	2025
Industrial/Employment	\$17,408,181
TOTAL - Property Tax Revenue	\$17,408,181

Figure B. 6

Non-Property Tax Revenues per Employee

Non-Residential Non-Tax Revenue	2025
<i>User Fees and Service Charges</i>	
General government	\$138,298.44
Protection services	\$501,731.44
Transportation services	\$25,915.85
Recreation and cultural services	\$195,755.00
Planning and development	\$225,439.31
Other	\$0.00
Licences, permits, rents, etc	\$145,693.84
Fines and penalties	\$374,567.04
Other revenue	\$0.00
Pickering - Non-Residential Non-Tax Revenue	\$1,607,401

Ongoing Costs

Figure B. 7
Municipal-Wide Operating Costs, per Employee

	2025
General government	\$1,805,681
Protection services	\$3,974,656
Transportation services	\$994,953
Environmental services - Excluding Water and Wastewater	\$114,632
Recreation and cultural services	\$608,735
Planning and development	\$424,717
Other	\$0
Pickering Non-Residential Town-Wide	\$7,923,374

Figure B. 8
Site-Specific Operating Costs

	2025
Paved Roads	\$234,000
Winter Control - Roads	\$69,000
Urban Storm Sewer System	\$97,000
Parks	\$1,155,000
Total	\$1,555,000

Replacement Cost Assumptions

Figure B. 9

Replacement Costs & Estimated Useful Life

	Units	Cost Per Unit	Estimated Service Life (Years)	Average Annual Cost (\$/Year/Unit)	Phase 1	2025
Roads						
Collector Road	metres	\$3,200	50	\$64	74,000	\$4,736,000
Stormwater						
Storm mains	metres	\$1,200	72	\$17	32,640	\$544,000
Maintenance Holes	each	\$9,700	72	\$135	510	\$68,708
Oil Grit Separators	each	\$129,400	72	\$1,797	6	\$10,168
Catch Basin and Lead	each	\$4,100	72	\$57	845	\$48,118
Service Connection	each	\$600	72	\$8	2,585	\$21,542
Parks						
Playground Equipment	each	\$78,800	45	\$1,751	16	\$28,018
Buildings	each	\$190,900	45	\$4,242	6	\$25,453
Electrical / Lighting	each	\$20,600	45	\$458	102	\$46,693
Site Furniture	each	\$3,500	45	\$78	81	\$6,300
Site Structures	each	\$18,200	45	\$404	114	\$46,107
Subsurface Infrastructure	each	\$14,900	45	\$331	32	\$10,596
Parking lots and Internal Roads	per metre	\$100	25	\$4	9,557	\$38,228
Pedestrian Corridors	per metre	\$200	25	\$8	17,581	\$140,648
TOTAL - SITE SPECIFIC REPLACEMENT COSTS						\$5,771,000

Appendix C:
Fiscal Impact Modelling:
Land Use Option 3

One-Time Revenues

Figure C. 1

Development Charge Revenue

	2025
Industrial/Employment	\$212,600,000
Total Development Charge Revenue	\$212,600,000

Figure C. 2

Building Permit Revenue (per sq. m.)

	2025
Industrial/Employment	\$31,772,870
TOTAL - Fee Per sq. m.	\$31,772,870

Non-Tax Revenues & Cost Assumptions

Figure C. 3

Non-Tax Revenue Assumptions per Resident & Employee

	2024 Non-Tax Revenue	Residential Share	Non-Residential Share	Growth Share	2024 Non-Tax Revenue Per Capita	2025 Non-Tax Revenue Per Capita	2024 Non-Tax Revenue Per Employee	2025 Non-Tax Revenue Per Employee
User Fees and Service Charges								
General government	\$1,228,049	78%	22%	100%	\$8.11	\$8.27	\$8.11	\$8.27
Protection services								
Fire	\$57,009	78%	22%	100%	\$0.38	\$0.38	\$0.38	\$0.38
Police	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Court Security	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Prisoner Transportation	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Conservation authority	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Protective inspection and control	\$4,351,043	78%	22%	100%	\$28.73	\$29.31	\$28.73	\$29.31
Building permit and inspection services	\$47,174	78%	22%	100%	\$0.31	\$0.32	\$0.31	\$0.32
Emergency measures	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Provincial Offences Act (POA)	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Protection services	\$4,455,226					\$30.01		\$30.01
Transportation services								
Roads - Paved	\$221,277	78%	22%	100%	\$1.46	\$1.49	\$1.46	\$1.49
Roads - Unpaved	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Roads - Bridges and Culverts	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Roads - Traffic Operations & Roadside	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Winter Control - Except sidewalks, Parking Lots	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Winter Control - Sidewalks, Parking Lots Only	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Transit - Conventional	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Transit - Disabled & special needs	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Parking	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Street lighting	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Air transportation	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$8,848	78%	22%	100%	\$0.06	\$0.06	\$0.06	\$0.06
Sub-Total - Transportation services	\$230,125					\$1.55		\$1.55
Environmental services - Excluding Water and Wastewater								
Urban storm sewer system	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Rural storm sewer system	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Solid waste collection	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Solid waste disposal	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Waste diversion	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Environmental services - Excluding Water and	\$0					\$0.00		\$0.00
Health services								
Public health services	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Hospitals	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Ambulance services	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Ambulance dispatch	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Cemeteries	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Health services	\$0					\$0.00		\$0.00
Social and family services								
General assistance	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Assistance to aged persons	\$86,540	100%	0%	100%	\$0.73	\$0.75	\$0.00	\$0.00
Child care	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Social and family services	\$86,540					\$0.75		\$0.00
Social Housing								
Public Housing	\$0	100%			\$0.00	\$0.00	\$0.00	\$0.00
Non - Profit/Cooperative Housing	\$0	100%			\$0.00	\$0.00	\$0.00	\$0.00
Rent Supplement Programs	\$0	100%			\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0	100%			\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0	100%			\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Social Housing	\$0					\$0.00		\$0.00
Recreation and cultural services								
Parks	\$71,379	95%	5%	100%	\$0.57	\$0.58	\$0.11	\$0.11
Recreation programs	\$2,997,345	95%	5%	100%	\$24.05	\$24.54	\$4.53	\$4.62
Recreation facilities - Golf Course, Marina, Ski Hill	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Recreation facilities - All Other	\$4,291,567	95%	5%	100%	\$34.44	\$35.13	\$6.49	\$6.62
Libraries	\$54,775	95%	5%	100%	\$0.44	\$0.45	\$0.08	\$0.08
Museums	\$159,059	95%	5%	100%	\$1.28	\$1.30	\$0.24	\$0.25
Cultural services	\$15,307	95%	5%	100%	\$0.12	\$0.13	\$0.02	\$0.02
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Recreation and cultural services	\$7,589,432					\$62.12		\$11.71

	2024 Non-Tax Revenue	Residential Share	Non-Residential Share	Growth Share	2024 Non-Tax Revenue Per Capita	2025 Non-Tax Revenue Per Capita	2024 Non-Tax Revenue Per Employee	2025 Non-Tax Revenue Per Employee
Planning and development								
Planning and zoning	\$2,001,834	78%	22%	100%	\$13.22	\$13.48	\$13.22	\$13.48
Commercial and industrial	\$0		100%		\$0.00	\$0.00	\$0.00	\$0.00
Residential development	\$0	100%			\$0.00	\$0.00	\$0.00	\$0.00
Agriculture and reforestation	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Tile drainage/shoreline assistance	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Planning and development	\$2,001,834					\$13.48		\$13.48
Other								
	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - User Fees and Service Charges	\$15,591,206					\$116.18		\$65.02
Licences, permits, rents, etc								
Trailer revenue and permits	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Licences and permits	\$1,293,718	78%	22%	100%	\$8.54	\$8.71	\$8.54	\$8.71
Rents, concessions and franchises	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Royalties	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Green Energy	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Licences, permits, rents, etc	\$5,706,206					\$8.71		\$8.71
Fines and penalties								
Provincial Offences Act (POA) Municipality which admin	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other fines	\$1,704,191	78%	22%	100%	\$11.25	\$11.48	\$11.25	\$11.48
Penalties and interest on taxes	\$3,540,621	90%	10%	100%	\$26.92	\$27.46	\$10.71	\$10.92
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Fines and penalties	\$5,244,812					\$38.94		\$22.40
Other revenue								
Investment income	\$7,090,442	78%	22%	0%	\$0.00	\$0.00	\$0.00	\$0.00
Interest earned on reserves and reserve funds	\$2,561,719	78%	22%	0%	\$0.00	\$0.00	\$0.00	\$0.00
Gain/Loss on sale of land & capital assets	-\$69,200	78%	22%	0%	\$0.00	\$0.00	\$0.00	\$0.00
Deferred revenue earned (Development Charges) (SLC t	\$8,775,167	78%	22%	0%	\$0.00	\$0.00	\$0.00	\$0.00
Deferred revenue earned (Recreational land (The Planni	\$985,196	78%	22%	0%	\$0.00	\$0.00	\$0.00	\$0.00
Other Deferred revenue earned	\$226,644	78%	22%	0%	\$0.00	\$0.00	\$0.00	\$0.00
Donations	\$78,296	78%	22%	0%	\$0.00	\$0.00	\$0.00	\$0.00
Donated Tangible Capital Assets (SLC 53 0610 01)	\$935,996	78%	22%	0%	\$0.00	\$0.00	\$0.00	\$0.00
Sale of publications, equipment, etc	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Contributions from non-consolidated entities	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other Revenues from Government Business Enterprise (i	\$1,035,350	78%	22%	0%	\$0.00	\$0.00	\$0.00	\$0.00
Gaming and Casino Revenues	\$17,451,454	78%	22%	0%	\$0.00	\$0.00	\$0.00	\$0.00
Other	\$2,493,788	78%	22%	0%	\$0.00	\$0.00	\$0.00	\$0.00
Other	\$46,200	78%	22%	0%	\$0.00	\$0.00	\$0.00	\$0.00
Other	\$1,895,408	78%	22%	0%	\$0.00	\$0.00	\$0.00	\$0.00
Other	\$81,278	78%	22%	0%	\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Other revenue	\$43,587,738					\$0.00		\$0.00

Figure C. 4

Non-Tax Cost Assumptions per Resident & Employee

	Total Expenses (Excluding Long-Term Debt & Amortization)	Residential Share	Non-Residential Share	Estimated Growth Impact	Per Capita		Per Employee	
					2024 Expenses	2025 Expenses	2024 Expenses	2025 Expenses
General government								
Governance	\$2,089,346	78%	22%	50%	\$6.90	\$7.04	\$6.90	\$7.04
Corporate Management	\$9,510,050	78%	22%	50%	\$31.40	\$32.03	\$31.40	\$32.03
Program Support	\$20,468,430	78%	22%	50%	\$67.58	\$68.93	\$67.58	\$68.93
Sub-Total - General government	\$32,067,826					\$108.00		\$108.00
Protection services								
Fire	\$24,305,091	78%	22%	100%	\$160.50	\$163.71	\$160.50	\$163.71
Police	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Court Security	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Prisoner Transportation	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Conservation authority	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Protective inspection and control	\$8,778,907	78%	22%	100%	\$57.97	\$59.13	\$57.97	\$59.13
Building permit and inspection services	\$2,946,356	78%	22%	75%	\$14.59	\$14.88	\$14.59	\$14.88
Emergency measures	\$185,704				\$0.00	\$0.00	\$0.00	\$0.00
Provincial Offences Act (POA)	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Protection services	\$36,216,058					\$237.72		\$237.72
Transportation services								
Roads - Paved	\$2,183,471	78%	22%	50%	\$7.21	\$7.35	\$7.21	\$7.35
Roads - Unpaved	\$1,230,886	78%	22%	50%	\$4.06	\$4.15	\$4.06	\$4.15
Roads - Bridges and Culverts	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Roads - Traffic Operations & Roadside	\$2,768,211	78%	22%	50%	\$9.14	\$9.32	\$9.14	\$9.32
Winter Control - Except sidewalks, Parking Lots	\$895,766	78%	22%	50%	\$2.96	\$3.02	\$2.96	\$3.02
Winter Control - Sidewalks, Parking Lots Only	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Transit - Conventional	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Transit - Disabled & special needs	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Parking	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Street lighting	\$879,337	78%	22%	50%	\$2.90	\$2.96	\$2.90	\$2.96
Air transportation	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$4,856,049	78%	22%	100%	\$32.07	\$32.71	\$32.07	\$32.71
Sub-Total - Transportation services	\$12,813,720					\$59.51		\$59.51
Environmental services - Excluding Water and Wastewater								
Urban storm sewer system	\$493,314	78%	22%	50%	\$1.63	\$1.66	\$1.63	\$1.66
Rural storm sewer system	\$1,542,475	78%	22%	50%	\$5.09	\$5.19	\$5.09	\$5.19
Solid waste collection	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Solid waste disposal	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Waste diversion	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Environmental services - Excluding Water and Wastewater	\$2,035,789					\$6.86		\$6.86
Health services								
Public health services	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Hospitals	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Ambulance services	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Ambulance dispatch	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Cemeteries	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Health services	\$0					\$0.00		\$0.00

	Total Expenses (Excluding Long- Term Debt & Amortization)	Residential Share	Non- Residential Share	Estimated Growth Impact	Per Capita		Per Employee	
					2024 Expenses	2025 Expenses	2024 Expenses	2025 Expenses
Social and family services								
General assistance	\$456,102	100%		100%	\$3.85	\$3.93	\$0.00	\$0.00
Assistance to aged persons	\$640,576	100%		100%	\$5.41	\$5.52	\$0.00	\$0.00
Child care	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Social and family services	\$1,096,678					\$9.45		\$0.00
Social Housing								
Public Housing	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Non-Profit/Cooperative Housing	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Rent Supplement Programs	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Social Housing	\$0					\$0.00		\$0.00
Recreation and cultural services								
Parks	\$6,063,133	95%	5%	75%	\$36.49	\$37.22	\$6.88	\$7.01
Recreation programs	\$6,966,691	95%	5%	75%	\$41.93	\$42.77	\$7.90	\$8.06
Rec Fac - Golf Crs, Marina, Ski Hill	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Rec Fac - All Other	\$10,326,397	95%	5%	75%	\$62.15	\$63.40	\$11.71	\$11.95
Libraries	\$6,332,529	95%	5%	75%	\$38.11	\$38.88	\$7.18	\$7.33
Museums	\$1,777,974	95%	5%	75%	\$10.70	\$10.92	\$2.02	\$2.06
Cultural services	\$876	95%	5%	75%	\$0.01	\$0.01	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Recreation and cultural services	\$31,467,600					\$193.19		\$36.41
Planning and development								
Planning and zoning	\$5,028,479	78%	22%	75%	\$24.90	\$25.40	\$24.90	\$25.40
Commercial and Industrial	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Residential development	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Agriculture and reforestation	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Title drainage/shoreline assistance	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00
Sub-Total - Planning and development	\$5,028,479					\$25.40		\$25.40
Other	\$0				\$0.00	\$0.00	\$0.00	\$0.00

Ongoing Revenue

Figure C. 5

Property Tax Revenues

	2025
Industrial/Employment	\$16,658,547
TOTAL - Property Tax Revenue	\$16,658,547

Figure C. 6

Non-Property Tax Revenues per Employee

Non-Residential Non-Tax Revenue	2025
<i>User Fees and Service Charges</i>	
General government	\$132,343.00
Protection services	\$480,125.78
Transportation services	\$24,799.85
Recreation and cultural services	\$187,325.36
Planning and development	\$215,731.39
Other	\$0.00
Licences, permits, rents, etc	\$139,419.95
Fines and penalties	\$358,437.35
Other revenue	\$0.00
Pickering - Non-Residential Non-Tax Revenue	\$1,538,183

Ongoing Costs

Figure C. 7
Municipal-Wide Operating Costs, per Employee

	2025
General government	\$1,727,925
Protection services	\$3,803,499
Transportation services	\$952,108
Environmental services - Excluding Water and Wastewater	\$109,695
Recreation and cultural services	\$582,522
Planning and development	\$406,428
Other	\$0
Pickering Non-Residential Town-Wide	\$7,582,176

Figure C. 8
Site-Specific Operating Costs

	2025
Paved Roads	\$234,000
Winter Control - Roads	\$69,000
Urban Storm Sewer System	\$97,000
Parks	\$1,155,000
Total	\$1,555,000

Replacement Cost Assumptions

Figure C. 9

Replacement Costs & Estimated Useful Life

	Units	Cost Per Unit	Estimated Service Life (Years)	Average Annual Cost (\$/Year/Unit)	Phase 1	2025
Roads						
Collector Road	metres	\$3,200	50	\$64	74,000	\$4,736,000
Stormwater						
Storm mains	metres	\$1,200	72	\$17	32,640	\$544,000
Maintenance Holes	each	\$9,700	72	\$135	510	\$68,708
Oil Grit Separators	each	\$129,400	72	\$1,797	6	\$10,168
Catch Basin and Lead	each	\$4,100	72	\$57	845	\$48,118
Service Connection	each	\$600	72	\$8	2,585	\$21,542
Parks						
Playground Equipment	each	\$78,800	45	\$1,751	16	\$28,018
Buildings	each	\$190,900	45	\$4,242	6	\$25,453
Electrical / Lighting	each	\$20,600	45	\$458	102	\$46,693
Site Furniture	each	\$3,500	45	\$78	81	\$6,300
Site Structures	each	\$18,200	45	\$404	114	\$46,107
Subsurface Infrastructure	each	\$14,900	45	\$331	32	\$10,596
Parking lots and Internal Roads	per metre	\$100	25	\$4	9,557	\$38,228
Pedestrian Corridors	per metre	\$200	25	\$8	17,581	\$140,648
TOTAL - SITE SPECIFIC REPLACEMENT COSTS						\$5,771,000



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