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Building Our Future: Pickering's Economic Growth Roadmap

—

June 2026

01

Introduction

Project Overview

Background

The City of Pickering engaged KPMG to develop a visionary and actionable 2026-2030 Economic Development Strategy grounded in the City's unique context. The Strategy builds on the foundation of the 2022 Strategy and is designed to be implementation-ready, with clear objectives, defined actions, timelines, and performance measures.

To inform this work, KPMG engaged with City leadership and key stakeholders to better understand current economic conditions, identify future opportunities, and assess the role that major infrastructure investments can play in shaping Pickering's economic future. The overall project and interview objectives are summarized below.

Project Objectives

1. **Drive economic diversification and growth** by positioning Pickering to capitalize on emerging opportunities in advanced manufacturing, digital innovation, digital media, and creative industries.
2. **Support workforce and talent development** by fostering pathways to high-quality employment aligned with growing and future-focused industries.
3. **Leverage major infrastructure investments** to catalyze economic growth and strengthen Pickering's position as a regional hub.
4. **Strengthen regional competitiveness** by ensuring Pickering is investment-ready, cost-competitive, and aligned with federal and provincial economic priorities.
5. **Promote resilience and inclusivity** by embedding supply chain resilience, sustainability, adaptability, and community well-being into economic initiatives.

Interview Objectives

1. **Local Context Assessment**: Identify strengths, challenges, priorities and growth opportunities within the City and key sectors such as digital innovation, advanced technology, and logistics.
2. **Policy, Program and Infrastructure Review:** Understand existing policies, programs and infrastructure in place to support economic development.
3. **Feedback and Data Gathering:** Gather diverse insights and data, both qualitative and quantitative to help establish a baseline on Pickering's current economic context.
4. **Strategy Development Input:** Directly inform the City's Economic Development Strategy by translating stakeholder insights into practical, evidence-based actions.

Methodology and Sources

The purpose of this work is to develop a clear, evidence-based understanding of Pickering's current economic context, including key trends, opportunities, and constraints, to inform the development of the City's 2026–2030 Economic Development Strategy.

Key objectives:

- Establish a current-state economic baseline, reflecting recent growth, structural trends, and major transformational projects
- Identify key opportunities and challenges affecting Pickering's economic competitiveness and long-term resilience
- Assess workforce conditions, talent availability, and skills alignment in relation to priority and emerging sectors
- Identify land, infrastructure, servicing, and development considerations influencing employment growth and investment readiness

Data and Document Review

A comprehensive review and analysis of 50+ documents and data files provided by the City of Pickering.

Engagement with Local Stakeholders

Consultation through 13 interviews with Council, City staff, industry, and not-for-profits.

Online Survey

Additional stakeholder perspectives captured through two online surveys targeted to City staff and local businesses.

Secondary Research

Supplementary secondary research undertaken to validate findings and strengthen insights derived from primary data collection.

How the City of Pickering drives economic development

The City's Economic Development & Strategic Projects Department (Invest Pickering), is responsible for expanding Pickering's economic base and strengthening the City's national and international profile.

What is Economic Development?

It is the process of strengthening and reshaping a community's economy to improve overall well-being and quality of life.

This work is done collaboratively across public, private, and non-governmental partners to create the conditions that support economic prosperity.

The City of Pickering's Role in Economic Development

01

Drive Investment and Support Business Retention

Leads investment attraction and business retention initiatives, supported by targeted marketing and promotional programs to elevate Pickering's national and international profile.

02

Lead Strategic Projects and Growth Planning

Oversees major strategic projects and growth areas, including planning and development of employment lands and city-wide expansion initiatives.

03

Enhance Government and Stakeholder Engagement

Leads government and stakeholder engagement to support and advance key City priorities.

04

Delivers Corporate Initiatives

Advocates for and enhances City initiatives, including support for grant funding applications, naming rights opportunities, and community asset development projects.

Economic Development as a Strategic Enabler

To capitalize on major investments and sustained population growth, Pickering's Economic Development department must act as a strategic enabler by prioritizing the following:

01

Investment Attraction

Proactively target and secure high-value sectors and anchor employers that create quality jobs, diversify the local economy, and strengthen the non-residential tax base.

02

Investment Readiness

Ensure serviced, zoning-aligned employment lands and residential lands to support complete communities that are market-ready and capture both near and long-term investment opportunities.

03

Business Retention

Deepen engagement with existing businesses to support expansion, strengthen local supply chains, enhance competitiveness, and reduce outbound commuting.

02

Context – Growth, Change and Opportunity

Pickering at a Crossroads

Pickering is entering a critical window of opportunity to convert major projects into sustained long-term jobs, tax-base growth, and economic diversification.

Pickering is one of the fastest growing communities in Ontario with significant increases in population and workforce participation expected over the coming years.

This growth is driven by its strategic location within the GTA, strong connectivity, and a wave of investments in transformative projects.

+60%

Population growth from 2024 to 2044

~70%

Pickering's labour force participation rate is expected to increase from 65% in 2021 to nearly 70% by 2035, reflecting a growing share of residents aged 15+ who are employed or actively seeking work.

6 near-term growth catalysts

Pickering Nuclear Generating Station (PNGS) Refurbishment
A $26.8B clean-energy investment generating significant construction and long-term employment while strengthening Ontario's clean electricity system.

Seaton Community/Innovation Corridor
A planned growth area designed to accommodate 70,000 residents and 35,000 jobs anchored by a major innovation corridor.

City Centre
A 55-acre transit-oriented and mixed-use redevelopment with 6,000+ residential units to create a connected urban core.

Durham Live
A 240-acre entertainment and tourism destination featuring a hotel, convention space, gaming facilities and large-format attractions.

Northeast Pickering
Future land supply with 590 acres of Employment Areas lands as part of Pickering's growth strategy.

Pickering Federal Lands
Approximately 9,000 acres of federally owned land in Pickering, offering significant long-term growth potential.

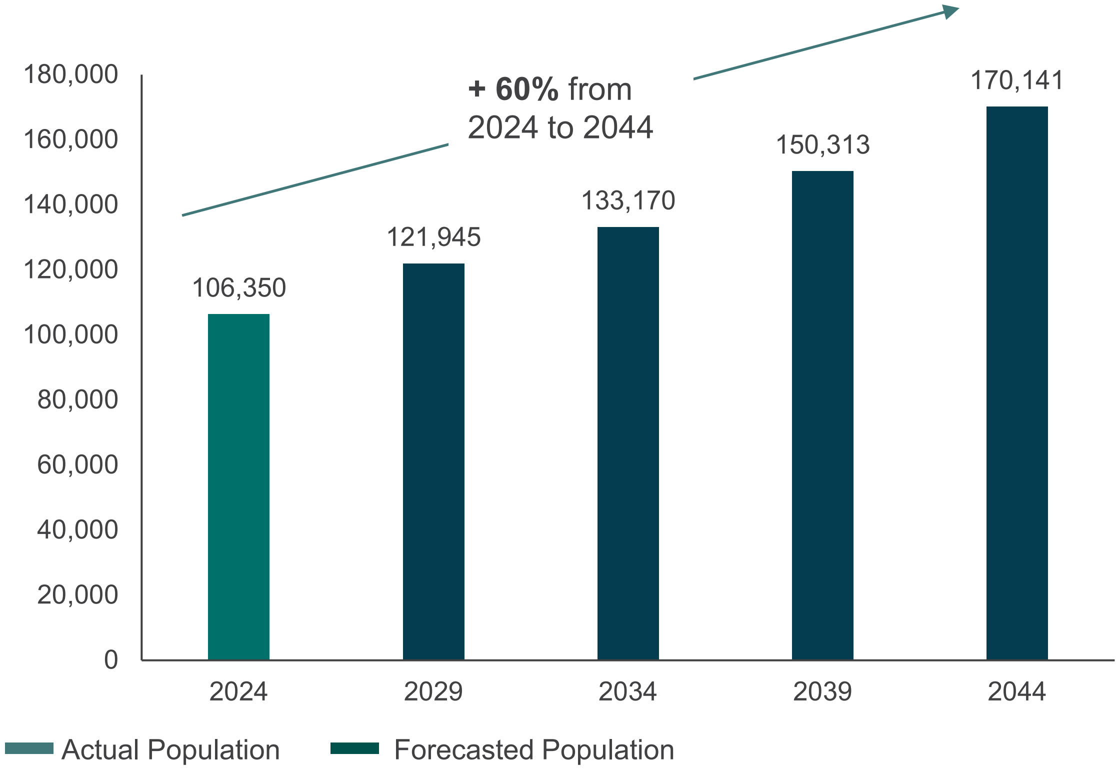
Pickering has a near-term opportunity to translate major projects into employment growth, tax-base growth, and sector diversification. Realizing this potential will require addressing key constraints, including servicing capacity, approvals processes, infrastructure readiness and labour pressures. To maximize impact, the Economic Development Strategy must focus on a set of high-value priorities delivered through strong partnerships and coordinated action across the City and its stakeholders.

Sources: City of Pickering – Detailed 20-Year Population & Housing Unit Forecast.

A City in Transformation

Pickering is one of the fastest growing communities in Ontario, driven by a wave of major residential, commercial, and infrastructure investments. To fully capitalize on these opportunities, Pickering is undertaking transformational projects and initiatives across the municipality.

Pickering Forecasted Population Growth



Sources: Durham Region; City of Pickering – Detailed 20-Year Population & Housing Unit Forecast.

Transformational Projects and Initiatives

Several major projects are being undertaken across Pickering which are fast-tracking growth across key sectors. These transformational projects are designed to support:

- Economic Growth
- Job Creation
- Innovation
- Investment Readiness

Major Projects Shaping Pickering’s Future

Pickering is experiencing a period of unprecedented growth, with numerous major infrastructure projects and development currently underway that are creating significant opportunity. Effectively capitalizing on the opportunities created through these projects can be critical to unlocking sustained employment growth, strengthening the non-residential tax base, and realizing Pickering’s long-term economic potential.

Sample Major Projects

	Expected Outcomes
Pickering Nuclear Refurbishment	• $26.8B investment generating 30,500 construction jobs and 6,700 sustained jobs, contributing a $41.6B GDP impact. • Will deliver enough clean electricity for ~2.2 million homes, strengthening Ontario’s nuclear supply chain.
Seaton Community	• A planned, full-service community designed to accommodate approximately 70,000 residents and 35,000 jobs. • The Seaton Innovation Corridor includes approximately 800 acres of employment lands, supporting an estimated 24,000 jobs.
City Centre Redevelopment	• 55-acre, mixed-use and transit-oriented master plan with 6,000+ residential units across 10+ towers designed to create a connected and vibrant urban core.
Durham Live	• 240-acre entertainment and tourism destination anchored by a hotel, casino, convention space and Porsche Experience Centre, supporting regional tourism and visitor-driven economic activity.

Sources: Government of Ontario, City of Pickering.

Sectors Positioned for Growth

Major developments across Pickering are strengthening core sectors while catalyzing emerging industries. These sectors align with the City's major projects and employment nodes, supporting diversification, job quality, and non-residential assessment growth.

Established Sectors	Key Projects and Assets
Advanced Manufacturing	• Innovation Corridor • Brock Industrial and Bay Ridges • Trench Canada • Signature Aluminium
AgriFoods	• FGF Innovation Business Park • Seaton Employment Lands • Kubota Canada HQ • Derlea Brands • Premier Brands
Clean Energy and Nuclear Innovation	• Pickering Nuclear Refurbishment • Enbridge Gas and Elexicon Energy Investments to expand servicing capacity
Information and Communications Technology	• Innovation Corridor • Durham OneNet • Rogers Accelerated High-Speed Internet Program • Search Engine People • Hi-Tech Bay
Transportation and Logistics	• Aspect Retail Logistics • The Shandex Group • Brock Industrial Park • Highway 7 widening

Emerging Opportunities	Key Projects and Investments
Healthcare and Life Sciences	• Jerry Coughlan Health and Wellness Centre • Planned Post-Acute Care Centre • BTNX • Nanz Pharma
Digital Media and Creative Industries	• TriBro Studios and Sunbelt Rentals facilities
Professional and Business Services	• City Centre Redevelopment • Kingston Road Intensification • R.J. Burnside and Associates Ltd. • Tetra Tech • S2S Environmental Inc • Thurber Engineering Ltd. • EnVision Consultants Ltd. • Black & McDonald • CanAtom (AtkinsRéalis + Aecon JV) • Worley Chemetics
Digital Innovation Industries (including AI)	• Innovation Corridor
Tourism, Culture and Recreation	• Durham Live • Dorsay Community & Heritage Centre • Porsche Experience Centre • Seaton Rec Centre and Library • City Centre which includes a mall, Pickleplex, Splitsville Bowling, and movie theatre

Why This Matters for Economic Development?

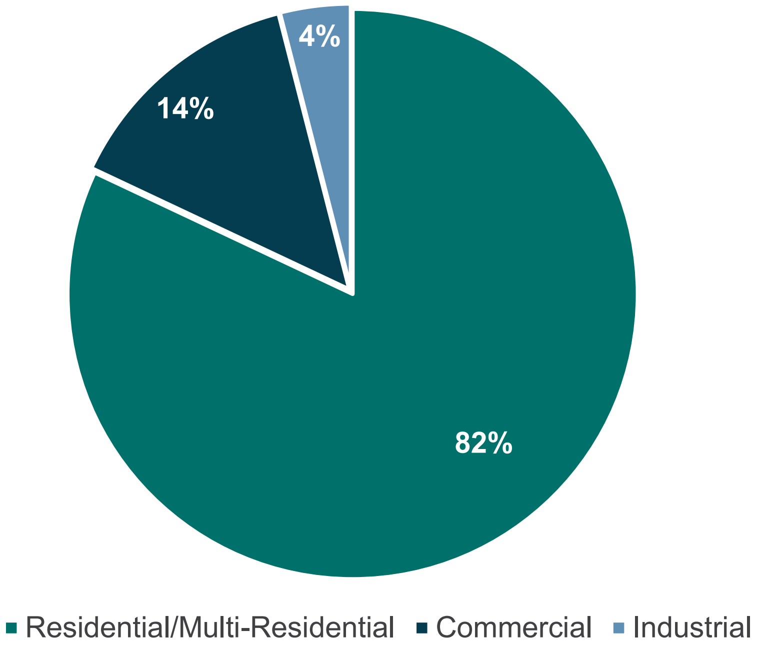
Pickering is at a critical inflection point. Economic development has a unique opportunity to place greater emphasis on value-creation and long-term outcomes. Several considerations reinforce why a focused economic development approach is essential.

Considerations	What this means for Economic Development?
Unprecedented growth creates a narrow window to act	• Pickering is experiencing simultaneous major investments, including the Nuclear Refurbishment, Seaton Community build-out, and City Centre redevelopment. - Without deliberate economic development intervention, the City risks capturing growth without fully realizing its economic value, such as high-quality jobs, non-residential assessment, and diversification.
Strong momentum must be strategically leveraged now	• Pickering is attracting attention in the market as major projects advance. • Economic Development must proactively target priority sectors, anchor employers, and investment types that align with long-term objectives.
Business growth is critical for fiscal sustainability	• Pickering's tax base remains heavily weighted toward residential assessment. • Expanding employment lands, attracting high-value businesses, and increasing commercial development are essential to: - Reduce pressure on residential taxpayers; and - Support infrastructure and service delivery as population growth accelerates.
Scale of growth requires coordination, not silos	• The volume and complexity of projects demand coordinated action across Economic Development, Planning, Engineering, and external partners such as utilities and senior governments.

Pickering Overview: Municipal Tax Base (1/2)

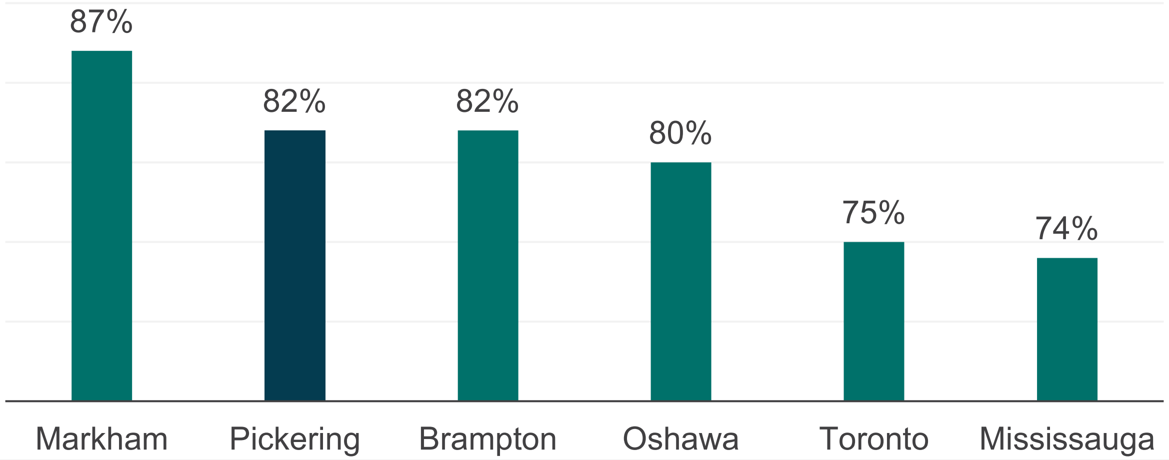
Pickering's weighted assessment base remains predominantly residential, reinforcing the importance of growing non-residential assessment over time. While Markham also demonstrates a similarly high reliance on residential assessment, Pickering remains among the most residentially dependent municipalities when compared to similar GTA municipalities.

Pickering Tax Base by Property Class



Source: Durham Post, Let's Talk Pickering, City of Mississauga – Municipality Study, City of Pickering 2026 Budget

Residential Tax Base by Municipality (2025 Weighted Assessment Composition)



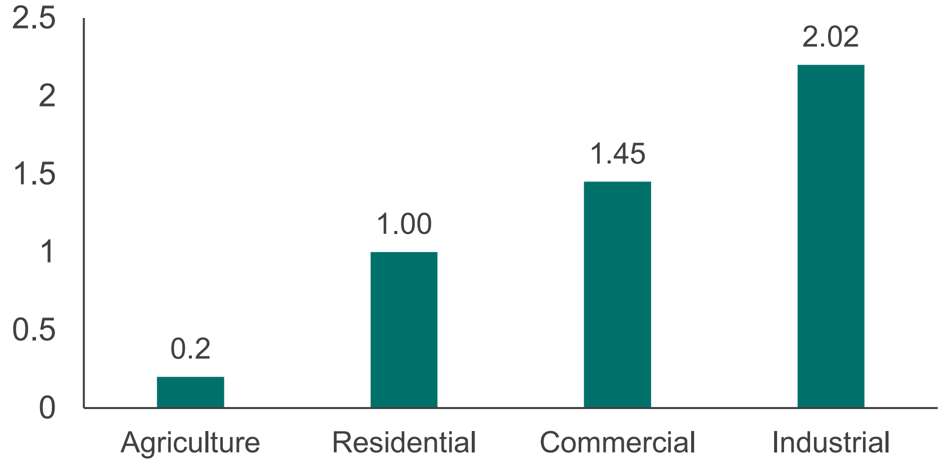
- *Similar to Brampton, Pickering's tax base remains heavily residential (82%), highlighting a stronger reliance on residential assessment than many municipalities in the region.*
- *Strengthening Pickering's non-residential tax base will be key to improving long-term fiscal balance and reducing reliance on residential assessment.*

Pickering Overview: Municipal Tax Base (2/2)

With Pickering's tax base weighted heavily toward residential assessment, diversifying revenue sources has become an important long-term priority. Understanding how different property classes contribute to the municipal levy highlights an opportunity to support long-term fiscal balance through employment growth and non-residential assessment.

Durham Region Tax Ratios by Property Class

Industrial properties pay **39.3%** more per dollar of assessment than commercial properties, presenting an opportunity to improve tax revenue.



Benefits of Diversifying Durham Region's Tax Base

- ✓ **Reduced Residential Tax Pressure:** Diversifying the tax base shifts a greater share of municipal revenue generation to non-residential properties, helping limit residential tax increases and improve long term affordability
- ✓ **Improves Fiscal Stability and Resilience:** A stronger commercial and industrial tax base spreads fiscal risk, reducing reliance on a single revenue source and improving the municipality's ability to manage economic and cost pressures
- ✓ **Aligns Growth with Service Cost:** Expanding the non-residential tax base ensures businesses benefiting from regional infrastructure and services contribute more proportionately to their costs
- ✓ **Supports Infrastructure and Economic Investment:** Increased non-residential revenues create greater capacity to invest in transit, servicing, employment lands, and other growth enabling infrastructure

Source: GTA Regions Summary of Tax Tools, Ontario, Stronger Together FCM, Municipal Property Assessment Corporation, Durham By-law Number 2025-002

Stakeholder Engagement Objectives and Process

Engagement Objectives

Local Context Assessment: Identify strengths, challenges, priorities and growth opportunities within the City and key sectors (e.g., Digital Innovation and Advanced Technology, Logistics, etc.)

Policy, Program and Infrastructure Review: Understand existing policies, programs and infrastructure in place to support economic development.

Feedback Gathering: Gather diverse insights and feedback from different stakeholder groups.

Consensus Building: Help build consensus among stakeholders on the main areas that the economic development strategy should focus on.

Stakeholder Alignment: Ensure stakeholder needs and expectations are reflected in the strategy.

Business Insights Integration: Ensure that the insights gathered from local business owners and large/key businesses are relevant to the development of the Economic Development Strategy (the "Strategy")

Engagement Strategies

✓ One-on-one stakeholder interviews

✓ Group discussions and workshops

✓ Digital Community Survey using the City's "Let's Talk Pickering" Platform

Key Survey and Interview Themes

Based on survey responses and stakeholder interviews, several cross-cutting themes emerged that can play a critical role in shaping Pickering's future economic growth and prosperity. These themes highlight both enabling conditions and areas requiring targeted action.

Infrastructure, Land Readiness and Mobility as Critical Enablers

- Servicing capacity, transportation congestion, and transit gaps were noted as the top constraints to growth.
- Stakeholders prioritized a need to unlock shovel-ready employment lands (e.g., Innovation Corridor).
- Strong alignment was noted that infrastructure timing, servicing capacity, and coordinated delivery of enabling services* are key determinants of successful investment attraction and business development.

Talent, Workforce and Livability Competitiveness

- Growing skills shortages, especially in trades and technical roles.
- Workforce attraction and retention were closely linked to housing affordability, transit access, and overall quality of life.
- A clear need emerged for stronger education, training, and workforce pipelines aligned with employer and industry needs.

Business Environment and Cost Competitiveness

- Mixed sentiment on business climate with the opportunity to improve predictability and ease of doing business.
- Key barriers identified by stakeholders included lengthy permitting timelines, regulatory complexity, and rising costs.
- There is demand for clearer processes, faster approvals, and more business support and engagement.

Leveraging Major Assets and Strengthening Brand

- Major projects (e.g., PNGS refurbishment) viewed as transformational economic projects.
- Stakeholders identified a need to better capture local benefits (jobs, suppliers, tax base).
- Strengthening Pickering's brand, sector focus, and sense of place emerged as a priority to attract investment and talent.

***Note:** e.g., electricity, natural gas, broadband/internet, water/wastewater, etc.

03

Situational Analysis

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Situational Analysis: Introduction

Understanding the City

A SWOT analysis is a strategic planning tool used to identify and evaluate the Strengths, Weaknesses, Opportunities, and Threats related to local economic development. It provides a framework for understanding internal and external factors that can impact a strategy and its success.

The SWOT analysis examines four key dimensions:

1. **Identify Strengths**: Assess internal attributes that provide a competitive advantage, such as unique assets, infrastructure, location, or institutional capacity that support economic success.
2. **Recognize Weaknesses**: Identify internal limitations or gaps that hinder performance or constrain economic development outcomes.
3. **Explore Opportunities**: Analyze external factors that the City can leverage to advance economic goals, including market trends, emerging industries, policy shifts, or technological change.
4. **Evaluate Threats**: Consider external challenges that may negatively affect economic outcomes, such as competitive pressures, regulatory barriers, infrastructure limitations, or broader economic uncertainty.

By systematically examining these four areas, the City can develop strategies that capitalize on strengths and opportunities while addressing weaknesses and threats.

This section synthesizes and interprets feedback gathered through the Current State Assessment and Community Engagement process. It identifies priority areas for Pickering's Economic Development Strategy, recognizes where the City has competitive advantages, and highlights gaps that must be addressed to support a targeted, actionable, and results-oriented plan.

Strengths
For a municipal economic development strategy, strengths are internal attributes that enhance the municipality's ability to achieve its economic goals. Leveraging strengths can lead to sustainable growth and attract investment.

Weaknesses
Weaknesses are internal challenges that hinder the municipality's economic development efforts. Addressing these weaknesses will help improve economic performance.

Opportunities
Opportunities are external factors that the municipality can capitalize on to enhance economic development. By recognizing and pursuing these opportunities, the municipality can foster innovation and growth.

Threats
Threats are external challenges that could negatively impact municipal economic outcomes. Understanding threats allows the municipality to develop strategies to mitigate risks and support long-term sustainability

The evaluation in the four following pages helps to identify and organize noted characteristics of the City to support further assessment into how the Economic Development team can work to support the City's economic development objectives.

Strengths

The tables below outline Pickering's strengths identified through stakeholder interviews, survey and documentation review. Collectively, they position Pickering to capitalize on growth, attract investment, and support long-term economic diversification.

Institutional / Municipal

- **Alignment with Government Priorities:** Pickering's major growth agenda aligns well with federal, provincial, and regional priorities around clean energy, innovation, infrastructure, and economic resilience, strengthening its case for external partnerships and funding.
- **Investment Credibility:** Recent wins in attracting advanced manufacturing and agri-food employers demonstrate market confidence in Pickering as a place to do business and invest.
- **Strong Regional Partnership Ecosystem:** Pickering benefits from a wider business support network that includes Invest Durham, Spark Centre, and the Ajax-Pickering Board of Trade, giving local firms access to advisory, networking, and scale-up supports.

Economic/Sectoral

- **Generational Growth Catalysts:** Major projects such as the Pickering Nuclear Refurbishment, Seaton / Innovation Corridor, City Centre redevelopment, and Durham Live act as powerful economic drivers that support employment creation, tax-base growth, and diversification.
- **Established Industrial and Energy Base**: Pickering already has a strong base in utilities, manufacturing, construction, retail, and professional services, giving the City sectoral depth and a platform for diversification.

Land and Development

- **Large Employment Land Supply:** Pickering has a significant employment land advantage within the eastern GTA, including Seaton/Innovation Corridor, Brock Industrial Area, Whites Road Prestige Business Park, and future employment land potential in Northeast Pickering and Pickering Federal Lands.
- **Mix of Established and Emerging Nodes:** The City offers both established employment areas and large-scale greenfield growth opportunities, allowing it to accommodate near-term expansion and long-term investment attraction.
- **Strategic Regional Connectivity:** Direct access to Highways 401, 407, and 7, as well as GO Transit service and Durham Region Transit, provide strong regional and GTA market access for workers, customers, and goods movement.
- **Scarce GTA Development Capacity:** Compared with more built-out peer municipalities, Pickering retains substantial capacity to accommodate major employment projects, campus-style development, and large-format users.

Workforce and Community

- **Strong Growth Fundamentals:** Pickering is experiencing rapid population growth alongside rising workforce participation, supporting labour force expansion.
- **Educated Resident Base:** The City has a relatively well-educated population, positioning Pickering to support continued growth in professional, technical, and knowledge-based occupations.

Weaknesses

The tables below outline Pickering's weaknesses identified through stakeholder interviews, survey and documentation review. Addressing these constraints can be critical to improving Pickering's competitiveness, investment readiness, and long-term economic outcomes.

Institutional / Municipal

- **Mixed Business Experience:** Business sentiment is divided between seeing Pickering as business-friendly and challenging, suggesting that the City's value proposition is not always experienced consistently.
- **Approvals and Permitting Friction:** Stakeholders identified development approvals and zoning processes as complex, slow, and difficult to navigate, particularly for smaller firms or routine expansions.
- **Internal Capacity Constraints**: City staff noted the need for stronger coordination, additional staffing capacity, and improved tools or technologies to support proactive and responsive economic development delivery.

Land and Development

- **Uneven Site Readiness:** Not all employment lands are equally investment-ready; servicing, zoning clarity, and site readiness vary by node and may slow investment uptake.
- **Shovel-ready Constraints:** While Pickering has significant employment land capacity overall, some established nodes offer limited infill opportunities or site-specific constraints.
- **Infrastructure Capacity Constraints:** Water, wastewater, energy, transportation, and digital infrastructure limitations are limiting development readiness in certain locations.

Economic / Structural

- **Employment Imbalance:** Pickering's employment base remains heavily concentrated in utilities and resident-serving sectors, with many higher value professional and knowledge workers commuting outside the City.
- **Residential Tax Base Dependence**: Stakeholders emphasized that economic development success must translate into a stronger non-residential tax base, indicating a structural fiscal imbalance.
- **Risk of Low Job-Density Absorption:** Some land uses that are attractive from a tax perspective, such as warehousing and data centres, may not generate the level of employment density the City is targeting.
- **Incentive Competitiveness:** Pickering is perceived as less competitive than some peer municipalities offering cost-offset programs and business incentives (e.g., community improvement plans).

Workforce and Livability

- **Housing Affordability Pressure:** Rising housing costs and limited rental supply are increasing affordability pressures, which may constrain Pickering's ability to attract and retain workers across income levels.
- **Skills Gaps and Labour Competition:** Employers reported challenges attracting skilled trades, technical, and engineering talent, with growing wage competition linked to major projects and larger employers.
- **Transit and Last-Mile Gaps:** Employees may be able to reach Pickering regionally, but often face difficulty accessing workplaces for the last-mile.
- **Healthcare Infrastructure Gap:** The absence of a full-service hospital within city limits was identified as an issue affecting competitiveness and complete-community positioning.

Opportunities

The tables below outline opportunities identified through stakeholder interviews, survey and documentation review. Together, they represent high-impact levers for advancing Pickering's economic development objectives and long-term competitiveness.

Major Projects and Sector Growth

- **Build a Clean Energy and Nuclear Hub:** PNGS refurbishment can be leveraged as more than a construction project; it can anchor supply-chain growth, specialized services, R&D, training, and longer-term clean energy positioning.
- **Use Major Projects as Long-Term Catalysts**: Seaton / Innovation Corridor, City Centre, Durham Live, and PNGS offer opportunities to convert near-term development into sustained employment growth, increased non-residential assessment, and sector diversification.
- **Attract Higher-Value Employment:** Stakeholder feedback supports targeting advanced manufacturing, clean energy, AI/cybersecurity, engineering, and professional services to improve job quality and economic resilience.

Business Environment

- **Strengthen Ease of Doing Business:** There is clear opportunity to formalize a more transparent, 'one-window', and business-friendly model that improves approvals, navigation, predictability, and includes a formalized retention/aftercare program.
- **Expand Competitiveness Tools:** Benchmarking indicates that peer municipalities are more active in using legislated tools such as CIPs or development charge-related competitiveness measures that Pickering could evaluate and adapt.

Land and Development

- **Accelerate Seaton / Innovation Corridor:** There is a major opportunity to service, market, and position Seaton and the Innovation Corridor for job-dense, investment-ready development.
- **Plan the Next Land Pipeline Early**: Internal stakeholders pointed to Northeast Pickering and Pickering Federal Lands as future strategic opportunities that should be planned early to avoid long-term supply constraints.
- **Package Employment Lands More Effectively:** Improved site data, clearer readiness information, and stronger investment packaging could improve responsiveness to investors and site selectors.

Talent and Brand

- **Develop Local Workforce Pipelines**: Partnerships with school boards, post-secondary institutions, and training providers can help build a future-ready workforce in skilled trades, clean energy, advanced manufacturing, and tech.
- **Improve Live-Work Competitiveness:** Better transit connections, housing options, and workspace in key nodes can help residents work closer to home and reduce outbound commuting.
- **Build City Centre for Talent Attraction:** City Centre can become a focal point for innovation, institutional uses, culture, and lifestyle amenities that help attract and retain younger workers and professionals.
- **Visitor economy expansion:** Maximize Durham Live and destination-focused placemaking impacts.

Threats

The tables below outline threats identified through stakeholder interviews, survey and documentation review. These external risks, if not proactively addressed, could limit Pickering's ability to convert growth momentum into sustained economic value.

Economic and Market

- **Nearby Community Competition:** Nearby municipalities are competing aggressively for non-residential investment, in some cases with faster approvals, more visible incentives, or stronger community infrastructure.
- **Rising Development Costs:** Interest rates, construction cost escalation, and market uncertainty could delay private investment or shift projects to more immediately development-ready locations.
- **Trade and Supply-Chain Disruption**: Manufacturing, logistics, and export-sensitive sectors remain vulnerable to tariffs, geopolitical shifts, and supply-chain volatility.
- **Construction-Led Growth Without Long-Term Capture:** There is a risk that Pickering captures short-term construction activity but not enough long-term firms, jobs, supplier participation, or non-residential assessment.
- **Overdependence on a Few Catalysts**: Heavy reliance on PNGS or a limited number of major projects could expose Pickering to long-term risk if timelines, investment levels, or market conditions change.
- **Land Absorption by Lower-Impact Uses**: Market-driven uses that are land-intensive but job-light may undermine employment density and tax-base diversification objectives.

Infrastructure and Delivery

- **Missed Investment Windows:** If infrastructure servicing, approvals, and site readiness do not keep pace with market interest, Pickering risks losing a once-in-a-generation opportunity to capture major investment.
- **Transportation Bottlenecks:** Ongoing congestion and mobility constraints could worsen as growth accelerates, affecting goods movement, commuting, and investment perceptions.
- **Construction and Servicing Strain:** Overlapping major projects may intensify disruption, labour competition, infrastructure strain, and project sequencing challenges.

Workforce and Community

- **Talent Attraction Pressures:** Housing costs, commuting burdens, and service gaps may undermine Pickering's ability to compete for younger workers, skilled trades, and technical talent.
- **Healthcare and Amenity Gaps**: Without strengthening complete-community attributes, Pickering may struggle to attract and retain talent and investment relative to peer municipalities.
- **SME Challenges:** Small and medium-sized enterprises may face difficulty competing with wages and procurement scale associated with major employers and major projects.

04

Vision, Strategic Initiatives, and Value Proposition

Strategy on a page

VISION

An innovative city that accelerates opportunity by leveraging its diverse talent, strategic location, and energizing ecosystem, enabling businesses and residents to thrive in a future-ready economy.

STRATEGIC PILLARS

Diversify and Expand the Local Economy

- Accelerate coordinated, infrastructure-aligned development of shovel-ready sites through timely servicing, phased delivery, and clear investor-ready site information across key nodes.
- Strengthen scale-up and entrepreneurship pathways for local businesses.
- Improve speed, predictability, and transparency of approvals and business navigation through a more coordinated “one-window” approach.
- Coordinate and advocate for mobility, utilities, digital and physical infrastructure that unlocks employment growth.

Leverage Major Projects to Stimulate Growth

- Leverage the Pickering Nuclear Refurbishment as a platform for supply-chain development, clean-energy innovation, advanced engineering, training, and related economic activity.
- Enable key infrastructure to create shovel-ready sites that increase both residential and non-residential growth
- Strengthen Pickering’s value proposition and proactive marketing to win competitive investments and reinvestments.
- Target job-dense priority sectors and anchor employers for Seaton/Innovation Corridor and City Centre.

Enhance Municipal Capacity and Fiscal Resilience

- Strengthen and diversify Pickering’s tax base through investment attraction and targeted employment growth.
- Build the City’s internal capacity (people, process, tools) to deliver the Strategy with clear accountability and an implementation-ready operating rhythm.
- Strengthen strategic partnerships with federal, provincial, regional, and key industry partners to advance economic priorities and unlock funding and investment.

Build Talent and Place Competitiveness

- Support development of future-ready talent pipelines in partnership with employers and training partners.
- Target the attraction of a post-secondary institution to support workforce development and local talent pipelines.
- Strengthen urban growth areas as locations for modern workspaces, innovation, and amenities that attract and retain talent.
- Elevate Pickering’s brand and “sense of place” to support talent attraction, retention, and investment.

Pickering's value proposition

Pickering offers investors a rare combination of scale, connectivity, and momentum, positioning it as one of the best locations to deliver large, high-impact growth in a competitive regional market.

Pickering is emerging as a high-value investment destination within the eastern GTA, supported by a unique convergence of large-scale employment lands, transformational infrastructure investments, and proximity to one of North America's largest economic regions. Unlike many neighbouring municipalities, Pickering has the capacity to accommodate significant new employment growth while remaining closely connected to Toronto and broader regional markets.

Pickering's offers investment-ready growth at scale. With access to major transportation corridors, expanding servicing capacity, and a pipeline of employment lands across multiple nodes, the City can support a range of uses from advanced manufacturing and logistics to clean energy and professional services. This is increasingly difficult to replicate across the GTA, where land availability is limited.

A series of generational projects reinforces this position. Major investments including the Pickering Nuclear refurbishment, Seaton Innovation Corridor, City Centre redevelopment, and Durham Live are driving sustained demand for jobs, suppliers, and business expansion, while Northeast Pickering and the Federal Lands represent a long-term pipeline for future growth. These projects are not isolated developments, but platforms for long-term economic activity, sector clustering, and investment attraction.

05

Action Plan

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Action Plan: Introduction

The following section outlines the key actions recommended to achieve the targeted objectives of the Economic Development Strategy. Each action has been identified to align with the established goals and priorities discussed in workshops, ensuring a strategic approach to economic growth and community development.

The actions on the following slides are categorized corresponding to each objective, providing a clear roadmap for implementation. To facilitate the effective planning and execution of the actions, estimated time frames and the Economic Development Team's role have been identified and defined. The time frames indicated reflect the estimated duration required for the implementation process, while the roles represent the anticipated responsibilities of the Economic Development Team. It is recommended that the time frames for implementation be viewed as a 5-year plan, with the understanding that certain actions may evolve into ongoing efforts if positive results emerge or if deemed necessary by the City. The time frames and roles outlined in the following slides are defined in the tables to the right.

Time Frames (5-year Plan)		
🟩	Short Term	6-months to <1-year
🟩	Medium Term	1 to 4-years
🟩	Long Term	Greater than 5-years

Economic Development Team Roles		
🟦	Leader	Responsible for spearheading efforts by the network and helping to ensure success of key initiatives. Leads the coordination of all of the different groups that are involved and ensure there is alignment among them in reaching a common goal.
🟦	Supporter	Responsible for supporting collaboration among stakeholders, organizing meetings and discussions to ensure that diverse voices are integrated into the decision-making process.
🟦	Promoter	Responsible for advocating for the city's initiatives and projects, engaging the community and external partners to generate support, resources, and awareness for local development efforts.

Pillar 1: Diversify and Expand the Local Economy

Objectives	Actions	Economic Development Team's Role	Timeframe
Accelerate coordinated, infrastructure-aligned development of shovel-ready sites through timely servicing, phased delivery, and clear investor-ready site information across key nodes.	**Develop and maintain a comprehensive Employment Lands Readiness Inventory:** Establish and regularly update an inventory assessing infrastructure capacity (water, sewer, electricity, natural gas, and internet) for employment lands, including lands identified in Seaton and the Innovation Corridor.	Leader	Short Term
	Maintain and enhance the 'Development Application Review Process' Study: Map all development steps, approvals, and permits to identify bottlenecks and implement targeted streamlining measures (e.g., redesigned workflows, parallel processing) to reduce timelines.	Leader	Short Term
	Monitor and respond to federal direction on the Pickering Federal Lands: Continue monitoring federal decision-making, consultation outcomes, and policy direction related to the Lands. Building on existing City analysis, prepare evidence-based input as needed to communicate Pickering's economic development interests. Any future City position related should be subject to Council direction and aligned with federal requirements.	Leader	Short Term
	Introduce rapid-response approvals for priority employment areas: Implement a fast-track approvals stream for priority employment developments, including consideration of pre-zoning and standardized zoning frameworks in key areas such as the Innovation Corridor, Brock Employment Area, and Whites / Granite Court Employment Area.	Leader	Medium Term
Strengthen scale-up and entrepreneurship pathways for local businesses.	**Develop a business referral and resource support program:** Create a referral system to connect existing businesses with access to funding, training, and support programs. This may include workshops, mentorship opportunities, and networking initiatives to support expansion and retention.	Leader / Supporter	Short Term
	Implement a formal post-investment aftercare program: Establish a structured follow-up process for newly arrived or expanded companies, including regular check-ins to address issues related to permits, utilities, workforce needs, and operations, reinforcing investor confidence and encouraging long-term growth.	Leader	Medium Term

Pillar 1: Diversify and Expand the Local Economy (cont'd)

Objectives	Actions	Economic Development Team's Role	Timeframe
Improve speed, predictability, and transparency of approvals and business navigation through a more coordinated "one-window" approach.	**Support establishment of a centralized business navigation / concierge function:** Enable a single point of contact for businesses navigating permits, approvals, and City supports, streamlining the experience for investors and expanding firms and improving ease of doing business.	Leader	Short Term
	Enhance digital permitting and tracking systems: Improve the City's digital permitting platform (MyPickering / MyCity) to support a seamless end-to-end application experience, including real-time status updates and increased transparency across approval stages.	Supporter	Medium Term
	Conduct regular company experience reviews through surveys/interviews: Identify recurring/common pain points or points working well across the approvals and permitting processes.	Leader	Medium Term
Coordinate and advocate for mobility, utilities, digital and physical infrastructure that unlocks employment growth.	**Develop a priority infrastructure investment and phasing plan:** Create an infrastructure investment map aligned with key employment growth areas (e.g., Innovation Corridor, City Centre) that identifies infrastructure needs, servicing constraints, and planned capital projects to better sequence development and improve readiness.	Leader	Short Term
	Advance priority infrastructure through business-case advocacy: Prepare detailed business cases demonstrating economic and tax-base impacts (e.g., road expansions, transit connections, digital connectivity, and servicing upgrades) to support funding applications, align with federal, provincial, and regional priorities, and secure inclusion in broader infrastructure investment programs.	Leader / Supporter	Medium Term
	Conduct a digital infrastructure gap analysis: Identify employment lands with insufficient broadband speed, reliability, or capacity and work with telecommunications providers to prioritize network upgrades that support business operations and investment attraction.	Supporter	Short Term

Pillar 2: Leverage Major Projects to Stimulate Growth

Objective	Action	Economic Development Team's Role	Timeframe
Leverage the Pickering Nuclear Refurbishment as a platform for supply-chain development, clean-energy innovation, advanced engineering, training, and related economic activity.	**Implement targeted supply-chain outreach:** Support the development of a focused outreach program to attract firms within the nuclear energy supply chain to locate in Pickering, including coordination with OPG and federal/provincial partners to conduct joint outreach.	Leader	Medium Term
	Launch a local supplier development initiative: Create and implement an initiative to connect Pickering-based businesses to PNGS-related procurement and subcontracting opportunities.	Leader	Medium Term
	Position Pickering as a hub for energy innovation and advanced manufacturing: Conduct joint marketing, events, and regional collaboration to attract investment from clean energy and advanced manufacturing firms, reinforce local supply-chain growth, and enable additional R&D activity in partnership with OPG and others.	Leader	Medium Term
	Showcase PNGS research and training assets: Promote existing OPG research and training facilities (e.g., Centre for Fusion Energy, refurbishment training facilities) to reinforce Pickering's role as a regional hub for energy innovation and skills development.	Promoter	Short Term
Enable key infrastructure to create shovel-ready sites that increase both residential and non-residential growth.	**Increase enabling infrastructure:** Leverage major projects (e.g., PNGS refurbishment, City Centre and Durham Live) to coordinate and advance enabling infrastructure such as transit, utilities and roads that support adjacent mixed-use and residential development.	Leader	Medium Term
	Prioritize residential and employment development: Designate specific areas around major projects where the City prioritizes integrated residential and employment development through coordinated planning and targeted partnerships (e.g., anchor employers like Wonderbrands and Kubota) to accelerate both population growth and job creation.	Leader	Short Term

Pillar 2: Leverage Major Projects to Stimulate Growth (cont'd)

Objective	Action	Economic Development Team's Role	Timeframe
Strengthen Pickering's value proposition and proactive marketing to win competitive investments and reinvestments.	**Create and maintain high-quality investment attraction materials:** Develop and regularly update investment-ready materials, including a digital investment portal, site selector packages, sector profiles, and virtual tours to support investor decision-making.	Leader	Medium Term
	Implement an annual, sector-focused marketing and outreach program: Deliver a targeted marketing program that identifies priority companies, site selectors, and brokers; executes direct outreach (calls, meetings, digital campaigns); participates in key industry events; and hosts site visits and tours to showcase Pickering's opportunities.	Leader / Supporter	Short Term
	Leverage CRM to manage the investment pipeline: Maintain and enhance the City's Salesforce customer relationship management system to track investment leads, prioritize opportunities, and advance business attraction and expansion efforts in a coordinated way.	Leader	Medium Term
	Conduct targeted international trade missions: Lead trade missions to select international markets (e.g., France, Germany, United Kingdom) focused on priority sectors such as advanced manufacturing, clean energy, and nuclear supply-chain firms to promote Pickering's employment lands and secure investment leads.	Leader	Medium Term
	Host reverse trade missions and investor visits: Organize inbound missions that bring high-potential investors and site selectors to Pickering for site tours and engagement sessions highlighting key assets (e.g., Seaton / Innovation Corridor, City Centre, PNGS), infrastructure readiness, and partnership opportunities.	Leader	Medium Term
	Maximize Durham Live as a destination development platform: Work with Durham Live, Destination Pickering, Durham Tourism, local businesses, and regional partners to strengthen Pickering's tourism and entertainment value proposition, support event-based visitation, attract complementary hospitality and rec. investment, and increase local business participation in visitor spending.	Promoter	Medium Term

Pillar 2: Leverage Major Projects to Stimulate Growth (cont'd)

Objective	Action	Economic Development Team's Role	Timeframe
Strengthen Pickering's value proposition and proactive marketing to win competitive investments and reinvestments.	**Position the Post-Acute Care Centre as an anchor for a healthcare and life sciences cluster:** Work with Lakeridge Health, regional health partners, post-secondary institutions, developers, and industry stakeholders to identify opportunities for complementary medical offices, rehabilitation services, health technology firms, medical device suppliers, training providers, and related professional services in the surrounding area.	Supporter	Medium Term
Target job-dense priority sectors and anchor employers for Seaton/Innovation Corridor and City Centre.	**Identify priority sectors and anchor tenant profiles**: Define and prioritize sector targets and anchor employer profiles aligned with specific employment nodes (e.g., logistics and advanced manufacturing in Seaton; office, institutional, and innovation uses in City Centre).	Leader	Short Term
	Develop sector-specific value propositions and outreach strategies: Support the creation of tailored value propositions and marketing packages and proactively pursue anchor employers through targeted outreach, investment missions, and site selection engagement.	Supporter	Medium Term
	Align land-use planning and infrastructure to support large-scale users: Advocate for planning, zoning, and infrastructure approaches that accommodate larger users, including parcel assembly, flexible zoning, and adequate servicing capacity.	Promoter	Long Term
	Enhance support for small and medium-sized businesses: Provide support by simplifying zoning requirements and streamlining permitting processes to improve clarity, speed, and ease of navigation.	Promoter	Long Term

Pillar 3: Enhance Municipal Capacity and Fiscal Resilience

Objective	Action	Economic Development Team's Role	Timeframe
Strengthen and diversify Pickering's tax base through investment attraction and targeted employment growth.	**Inventory underutilized commercial and employment properties:** Create and maintain an inventory of underutilized sites (e.g., low-density retail plazas, aging industrial areas, excess parking lands) and develop site-specific redevelopment strategies for priority locations.	Leader	Short Term
	Review competitiveness of development costs and timelines: Support a competitiveness review of development charges, fees, and approval timelines, and implement targeted adjustments to improve the City's attractiveness for non-residential investment.	Supporter	Medium Term
	Conduct a Supply Chain Gap (SCG) analysis: Identify industries in Pickering that rely on imported inputs which could be sourced locally through an SCG, in order to prioritize business attraction opportunities that strengthen local supply chains and expand the tax base.	Leader	Medium Term
	Explore incentives to implement: Investigate potential incentives and implement where appropriate based on economic conditions to encourage employment and tax base growth (e.g., targeted financial incentives for business expansion, development charge relief tied to job creation).	Leader	Medium Term

Pillar 3: Enhance Municipal Capacity and Fiscal Resilience (cont’d)

Objective	Action	Economic Development Team’s Role	Timeframe
Build the City’s internal capacity (people, process, tools) to deliver the Strategy with clear accountability and an implementation-ready operating rhythm.	**Assess and right-size the Economic Development function:** Support HR and senior leadership in conducting a staffing and capacity review to assess current resources, identify gaps, and implement a team structure (roles, responsibilities, tools) aligned with growing workload demands.	Supporter	Short Term
	Evaluate and strengthen performance measurement frameworks: Review current performance metrics (e.g., investment leads, jobs created, tax-base growth, development timelines) and enhance tracking and reporting practices, including consideration of a centralized performance dashboard.	Leader	Short Term
	Formalize cross-departmental coordination mechanisms: Establish a quarterly cross-departmental coordination table to review major projects, resolve bottlenecks, align priorities, and ensure consistent execution across planning, engineering, and economic development.	Leader	Short Term
	Invest in targeted staff training and capacity-building: Support professional development in areas such as investment attraction, data analysis, client management, and partnership engagement to strengthen internal expertise and delivery capacity.	Leader / Supporter	Short Term

Pillar 3: Enhance Municipal Capacity and Fiscal Resilience (cont'd)

Objective	Action	Economic Development Team's Role	Timeframe
Strengthen strategic partnerships with federal, provincial, regional, and key industry partners to advance economic priorities and unlock funding and investment.	**Develop a coordinated funding and advocacy strategy:** Create a proactive funding and advocacy approach with regional, provincial, and federal partners (e.g., FedDev Ontario) to advance priority economic development projects, such as servicing for the Seaton / Innovation Corridor and digital connectivity upgrades across employment lands, including preparation of joint funding applications.	Leader	Medium
	Establish a pipeline of funding-ready priority projects: Create and maintain a ranked pipeline of priority projects (e.g., Federal Lands, Seaton, clean-energy and nuclear innovation hubs) supported by clear business cases, partnership models, and economic impact metrics to strengthen applications to programs such as the Strategic Innovation Fund (SIF), FedDev Ontario, and other economic development funding streams.	Leader	Medium
	Formalize partnerships with key institutions and industry: Strengthen strategic relationships with partners such as OPG, Durham College / other post-secondary institutions, Invest Durham, and industry organizations to co-develop and deliver initiatives that attract investment and unlock external funding.	Supporter	Medium
	Increase provincial government engagement: Host a dedicated information day for provincial officials (e.g., "Queen's Park Day") to raise awareness of Pickering's value proposition, priority projects, and investment opportunities among Members of Provincial Parliament and senior staff.	Leader	Medium
	Increase federal government engagement: Host a federal information day (e.g., "Day on the Hill") to strengthen relationships with Members of Parliament and federal departments, and to identify and cultivate provincial and federal champions who are regularly briefed on Pickering's key initiatives, wins, and opportunities.	Leader	Medium

Pillar 4: Build Talent and Workplace Competitiveness

Objective	Action	Economic Development Team’s Role	Timeframe
Support development of future-ready talent pipelines in partnership with employers and training partners.	**Convene a local workforce roundtable:** Support engagement with local employers, educators, and employment agencies through a workforce roundtable to identify emerging skills needs, workforce gaps, and shared priorities.	Supporter	Short Term
	Launch a targeted talent attraction campaign: Develop and implement a targeted campaign positioning Pickering as a place to build a career, emphasizing proximity to Toronto, relative affordability within the GTA, and emerging job opportunities linked to major projects.	Leader	Medium Term
	Create a centralized “Live and Work in Pickering” job portal: Develop and maintain a digital platform that connects residents with local employers, promotes career opportunities, and supports local workforce matching.	Promoter	Short Term
Target the attraction of a post-secondary institution to support workforce development and local talent pipelines.	**Attract a post-secondary institution**: Support the City in attracting a post-secondary institution with programs aligned to key high-growth industries (e.g., clean energy, advanced manufacturing, healthcare), including identifying potential partners, facilitating site selection in priority areas such as the City Centre, and coordinating partnerships with employers and training providers.	Supporter	Long Term
	Strengthen sector-focused education and training pipelines: Partner with local post-secondary institutions and school boards to develop sector-specific training programs aligned with priority industries (e.g., clean energy, logistics, advanced manufacturing), including high-school-level pathways such as dual-credit and apprenticeship programs.	Supporter	Long Term

Pillar 4: Build Talent and Workplace Competitiveness (cont’d)

Objective	Action	Economic Development Team’s Role	Timeframe
Strengthen urban growth areas as locations for modern workspaces, innovation, and amenities that attract and retain talent.	**Enhance transit connectivity to employment areas:** Support improvements to transit connectivity by working with Durham Region Transit and GO Transit to enhance local bus service and last-mile connections between residential neighbourhoods and key employment areas, engaging major employers to align transit routes with workforce commuting patterns.	Supporter	Long Term
	Align housing strategies with workforce needs: Advocate for alignment with City and regional housing strategies to ensure a diversity of housing options that support talent attraction and retention across income levels.	Supporter	Medium Term
	Encourage development of flexible and modern employment spaces: Support the growth of co-working spaces, incubators, and flexible industrial and office formats within employment nodes, and actively pursue provincial and federal funding opportunities (e.g., FedDev Ontario, Strategic Innovation Fund) to support development.	Promoter	Medium Term
	Pilot innovation-focused spaces in City Centre: Collaborate with developers to test innovation-oriented spaces such as start-up hubs, shared workspaces, and creative industries facilities within City Centre to support clustering, collaboration, and talent attraction.	Promoter	Long Term

Pillar 4: Build Talent and Workplace Competitiveness (cont'd)

Objective	Action	Economic Development Team's Role	Timeframe
Elevate Pickering's brand and "sense of place" to support talent attraction, retention, and investment.	**Develop and promote a coordinated place-branding strategy:** Create a unified place-branding approach that clearly defines Pickering's identity and delivers consistent messaging and visuals positioning the City as a place to live, work, and invest, highlighting key strengths such as livability, waterfront access, and growth opportunities.	Leader / Supporter	Medium Term
	Expand events, programming, and placemaking activities: Support and enhance programming in key locations (e.g., City Centre, waterfront, Durham Live) to increase vibrancy and community identity. This includes expanding events such as Energy & Innovation Expo, business open houses, and Pickering Waterfront Festival, as well as concerts and festivals at Durham Live and seasonal activities such as skating or trail experiences.	Supporter	Medium Term
	Create compelling storytelling and promotional assets: Develop digital and physical storytelling tools (videos, profiles, signage, visual content) that showcase local businesses, talent, quality of life, and career opportunities, and leverage social media and other platforms to engage residents, visitors, and investors.	Leader	Short Term
	Strengthen partnerships to promote Destination Pickering: Partner with tourism agencies, community organizations, and Pickering based businesses that support the visitor economy (e.g., Durham Tourism, Ajax-Pickering Board of Trade, Durham Workforce Authority) to promote Pickering as a destination for both employment and lifestyle, reinforcing the City's live-work-play narrative.	Promoter	Medium Term

06

Performance Monitoring Framework

Performance Monitoring Framework

Tracking and Monitoring System

- **Action Tracker:** Maintain a comprehensive implementation tracker for each action including lead role, timeframe, status, and next steps.
- **KPI Dashboard**: Develop and maintain a simple KPI dashboard tracking baseline conditions, annual targets, current results, and trends
- **Data Tracking:** Pull data quarterly from CRM (salesforce), permitting system, finance/tax, and partner reports.
- **Accountability:** Assign each action and KPI to an owner and review through internal cross-department coordination.

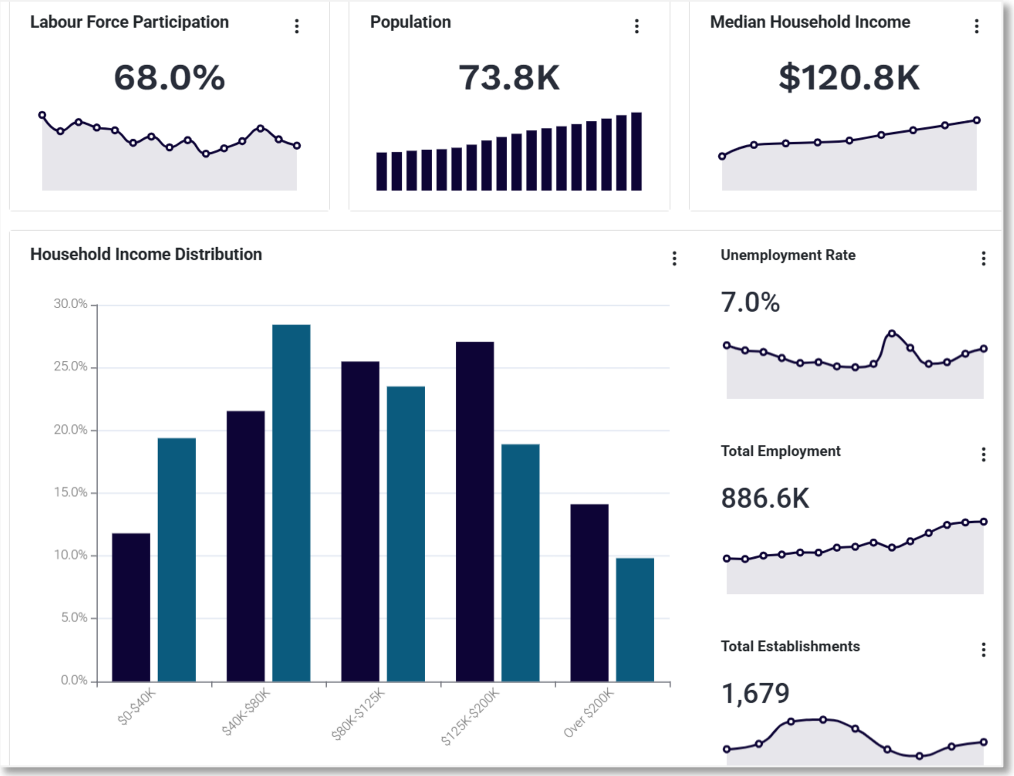
Sample KPI Scorecard

Category	Example KPIs*	Potential Data Sources
Pillar #1: Diversify and Expand the Local Economy	• Acres of employment land fully serviced and designated/zoned employment land • Percentage reduction in approval times • Number of high priority permits approved and dollars invested/jobs created • Success rate of problems solved through business concierge • Number of new business locations/expansions supported	• CRM (Salesforce) • Planning and development services (site plan applications, building permits) • Employment Land Inventory
Pillar #2: Leverage Major Projects to Stimulate Growth	• Number of local suppliers connected to major projects • Number of new business/jobs created in the clean energy and nuclear sectors • External investment secured through outgoing trade missions and industry events • Number of anchor tenant profiles developed	• Finance/Tax (tax revenue growth) • Economic Development tracking (partnerships, suppliers) • Partner reporting • Council/capital budget documents
Pillar #3: Enhance Municipal Capacity and Fiscal Resilience	• Average approval time for priority employment projects • Client satisfaction/business experience score • Ranking of the City's Economic Development budget/staffing relative to peers • Non-residential tax assessment growth • Number of senior government information days and key decision makers informed	• Permitting tracking system (MyCity) • Planning and development services (site plan approval timelines, zoning amendments) • Economic Development surveys
Pillar #4: Build Talent and Place Competitiveness	• Number of key workers/talent attracted and retained • Participants in training/talent programs and with regional education institutions • Number of new housing units build and ready for occupancy • Attendance and frequency of expanded events/programming in key areas	• Job portal analytics • Planning and development services (new office/innovation space approvals) • Event/communication analytics

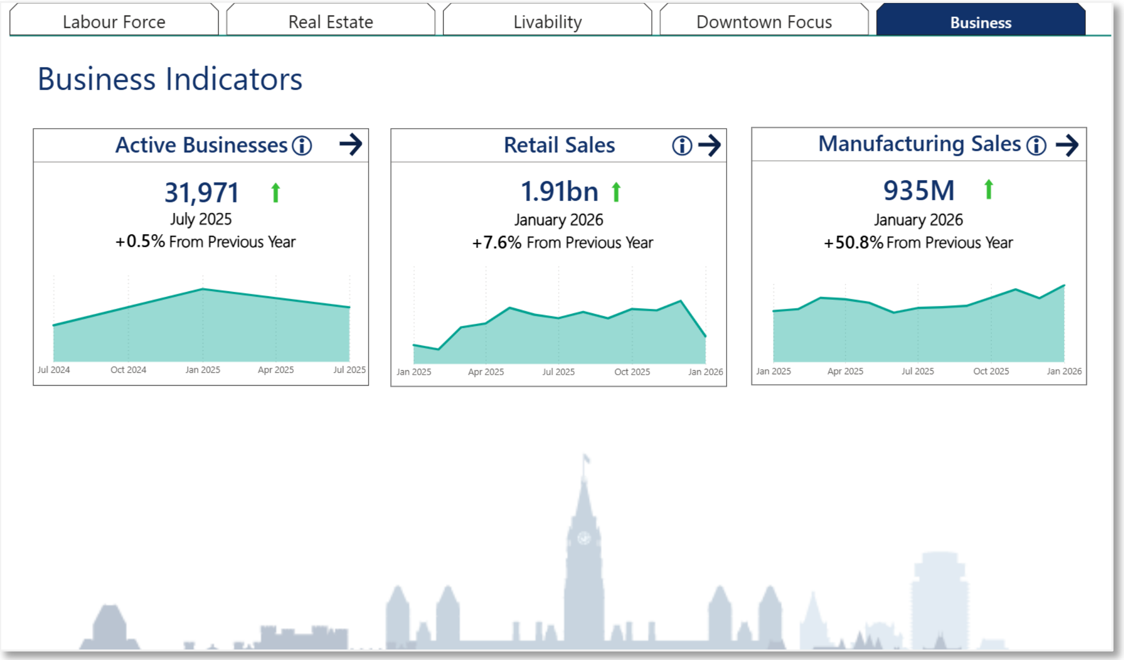
**These KPIs represent just a subset of exemplary metrics, and are not intended to be exhaustive. Additional indicators may be refined and incorporated as the strategy is finalized.*

Economic Development Dashboards Examples (1/2)

The examples below and on the following page illustrate how Ontario municipalities and regions are using data dashboards to track, manage, and communicate economic development performance.

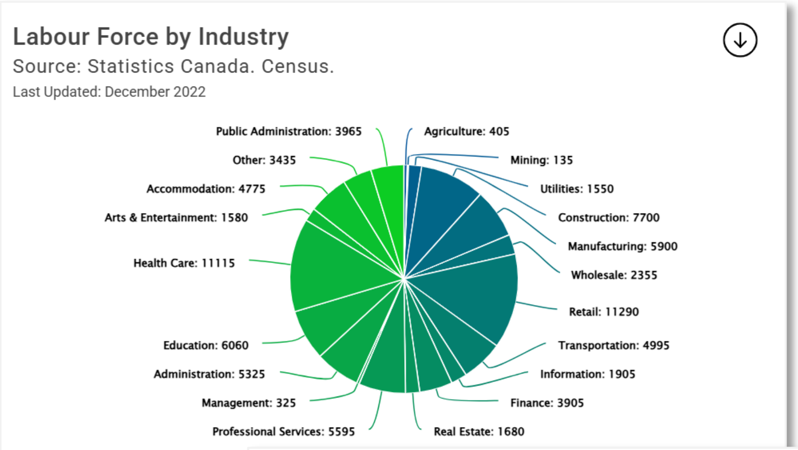


[Dufferin County](#)



[City of Ottawa](#)

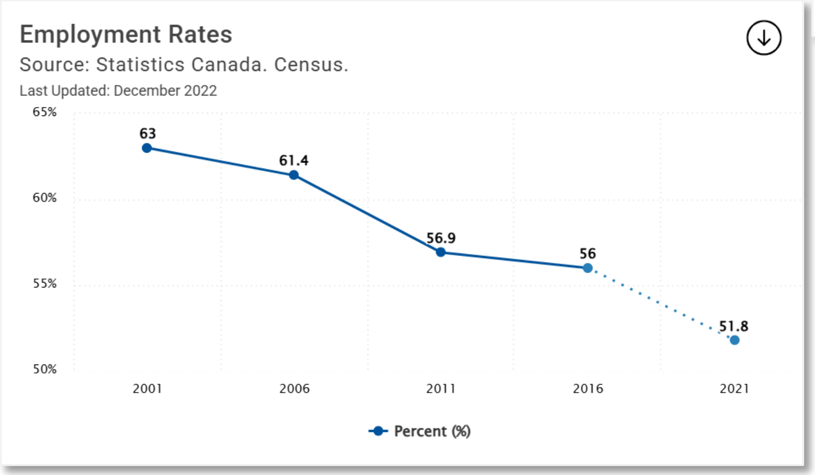
Economic Development Dashboards Examples (2/2)



Labour Force by Industry

Source: Statistics Canada. Census.

Last Updated: December 2022

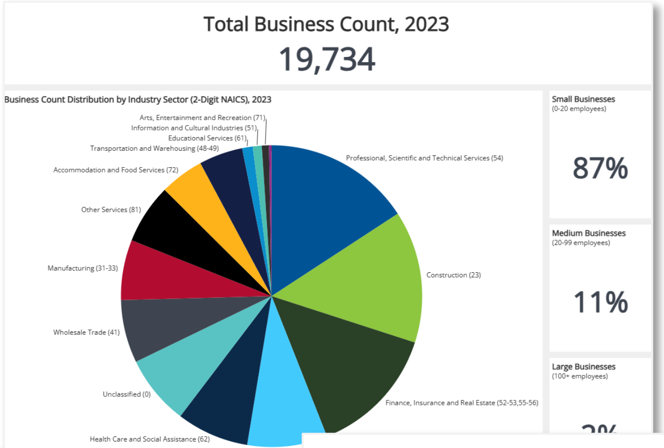


Employment Rates

Source: Statistics Canada. Census.

Last Updated: December 2022

[City of Oshawa]



Total Business Count, 2023

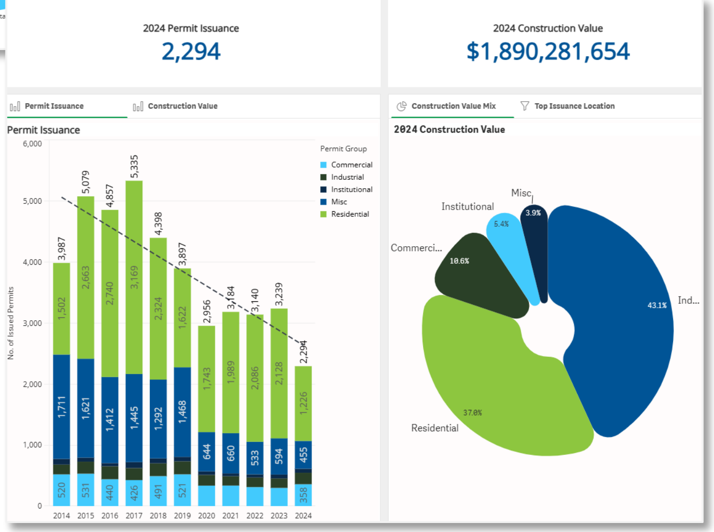
19,734

Business Count Distribution by Industry Sector (2-Digit NAICS), 2023

Small Businesses (0-20 employees) 87%

Medium Businesses (20-99 employees) 11%

Large Businesses (100+ employees)



2024 Permit Issuance

2,294

2024 Construction Value

$1,890,281,654

Permit Issuance

2024 Construction Value

[City of Vaughan]

Appendix

07

Appendix A: Current State Assessment

Converting Growth into Long Term Value

Pickering is in a high momentum growth cycle driven by major infrastructure investment, employment land availability, and population expansion. The opportunity is significant, but outcomes are not automatic. Capturing sustained jobs, tax base growth, and sector diversification will benefit from clear prioritization and coordinated delivery.

1	**Major projects as long-term platforms**	**Major projects, including the Pickering Nuclear Generating Station refurbishment, Seaton, City Centre, and Durham Live, are generational platforms for economic growth. Long-term value can be realized not through construction activity alone, but through supply-chain capture, innovation, and job density.**
2	**Increase local job capture**	**A significant share of Pickering residents continue to work outside the City, particularly in professional, engineering, finance, and technology roles.**
3	**Improve investor/reinvestment experience**	**Approval timelines, zoning clarity, traffic congestion, and cost pressures are influencing whether firms choose to expand locally or locate elsewhere.**
4	**Manage trade and supply-chain exposure**	**Export-oriented sectors such as manufacturing and agri-food face ongoing tariff risk and supply-chain volatility. In contrast, sectors like healthcare, film production, and locally anchored services offer greater domestic stability. Diversification and supply-chain resilience are key to long-term economic stability.**
5	**Infrastructure and employment land readiness**	**Employment lands create opportunity, but only if servicing, infrastructure, and zoning are aligned to support development ready sites - with Pickering's Economic Development & Strategic Projects team playing a critical role in enabling infrastructure growth and coordination.**

7.1

Economic and Demographic Snapshot

INVEST
PICKERING

Growth is Strong but Structure Matters

Pickering's growth fundamentals are strong, with rising population, income levels, and workforce participation. However, the structure of employment, housing pressures, and commuting patterns will determine whether growth translates into a more balanced and resilient local economy.

1	Population Growth	Population growth and income levels position Pickering as one of Durham's primary growth centres.
2	Sector Concentration Risk	Utilities employment tied to PNGS remains disproportionately large, reinforcing the importance of broadening into other advanced and knowledge-based sectors.
3	Residential Driven Jobs	Increasing local job capture can strengthen non-residential assessment growth.
4	Outbound Commuting Pattern	Many residents commute to higher value jobs outside Pickering, limiting local commercial assessment growth.
5	Housing Constraint Emerging	Tight rental supply and affordability pressures affect workforce attraction, especially for skilled trades and early career professionals.
6	Income Capture Gap	Rising household income is positive, but tax base benefits are greater when those jobs are physically located within the City.

Economic Performance and Labour Force

Pickering's labour market is projected to strengthen significantly, with the participation rate rising to a projected 69% by 2035 and median household incomes outpacing both Durham Region and Toronto.

150K

Estimated population in 2039

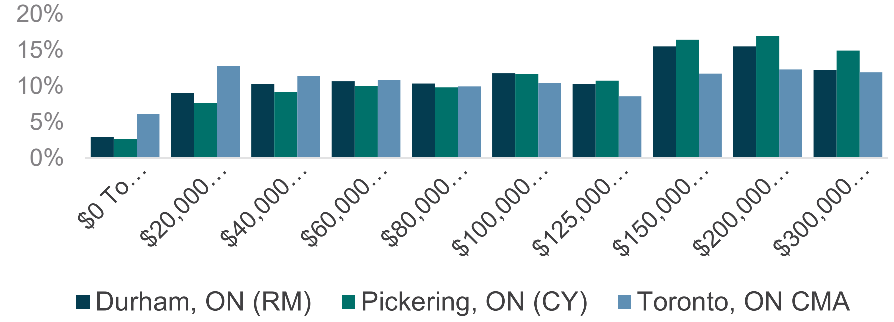
82K

Estimated population in the labour force in 2035

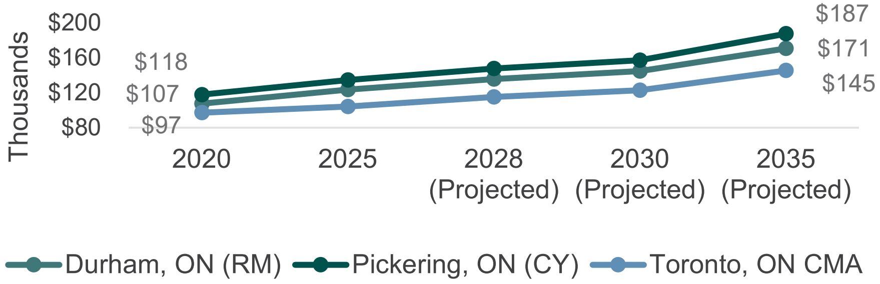
12%

Percentage of 2024 Pickering jobs in retail trade. The largest category, followed by Finance and Insurance (10%), Professional, Scientific, and Technical Services (9%), and Utilities (8%).

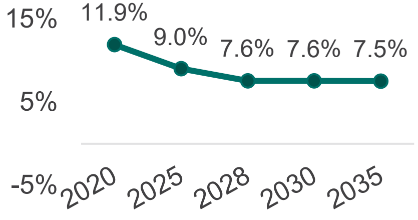
Household Income Distribution (2025)

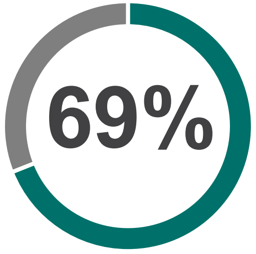


Median Household Income (2020 - 2035)



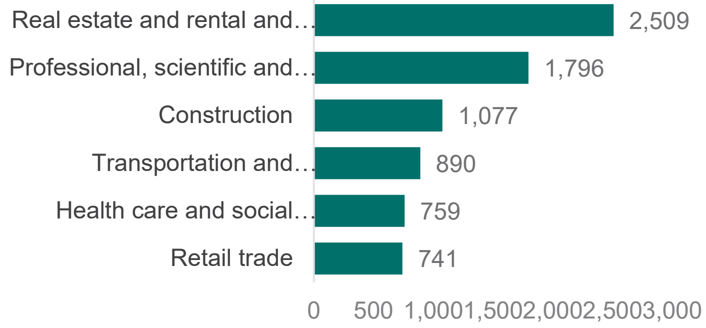
Pickering Unemployment Rate (2025 – 2035)





Anticipated Participation Rate in 2035

Top 6 Business Categories by Number of Businesses in Pickering (2024)



Source: Environics, Lightcast Q1 2025 Dataset, Detailed 20-Year Population & Housing Unit Forecast

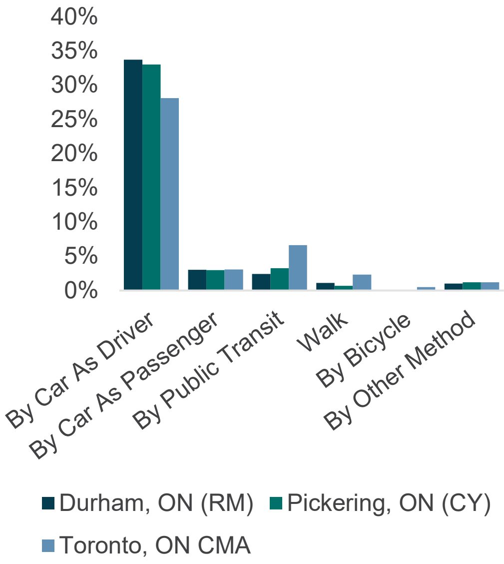
Population and Demographic Details

Pickering's population is not only growing rapidly, but also becoming increasingly well-educated, with a higher share of university-educated residents compared to the broader region.

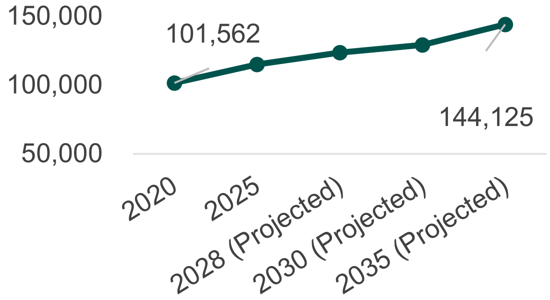
41

Average age in Pickering in 2025.

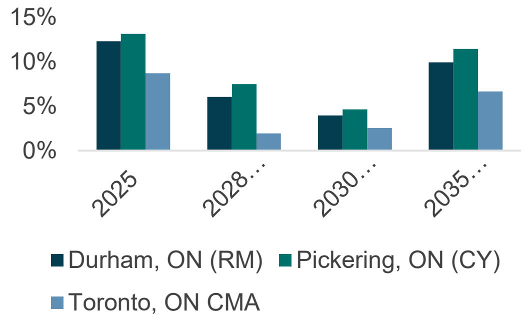
Travel to Work Methods (2025)



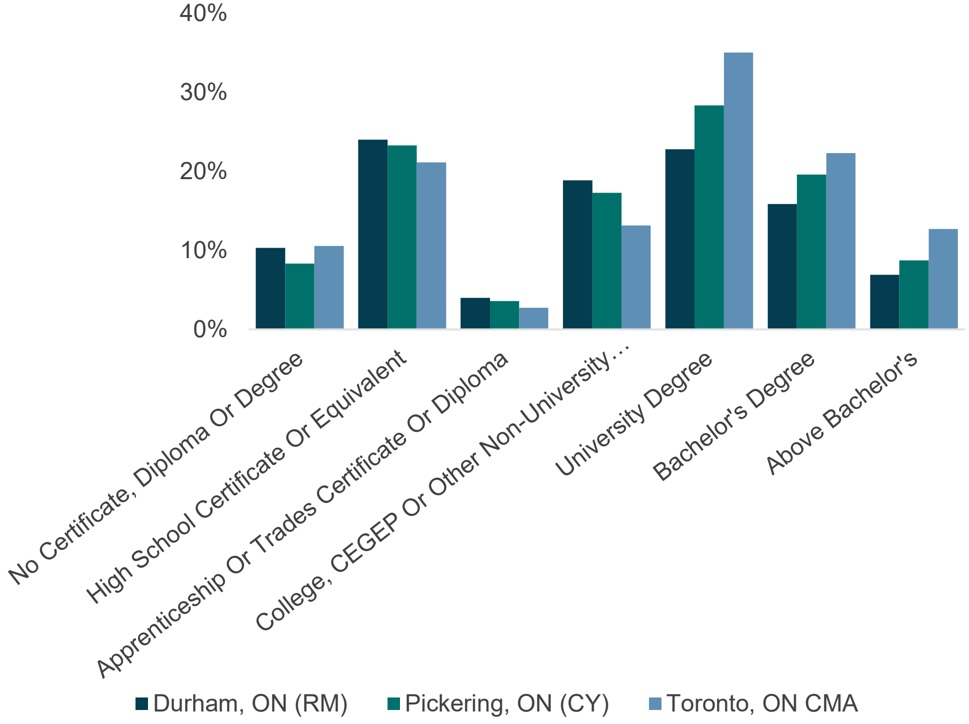
Pickering Expected Population Increase (2020 to 2035)



Population Rate Increases



Education Levels as a Percentage of Population (2025)

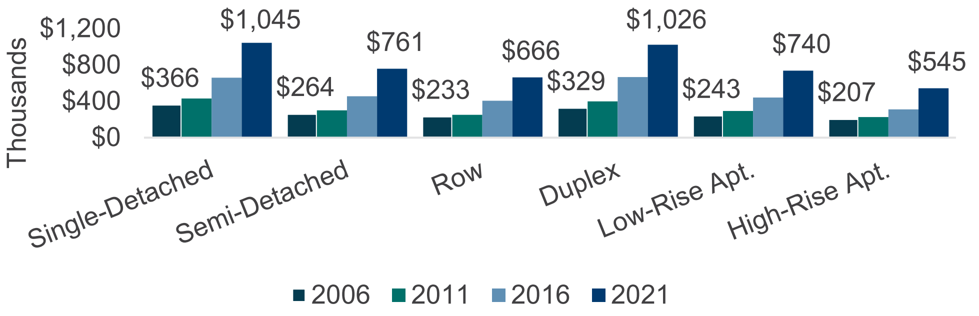


Source: Environics

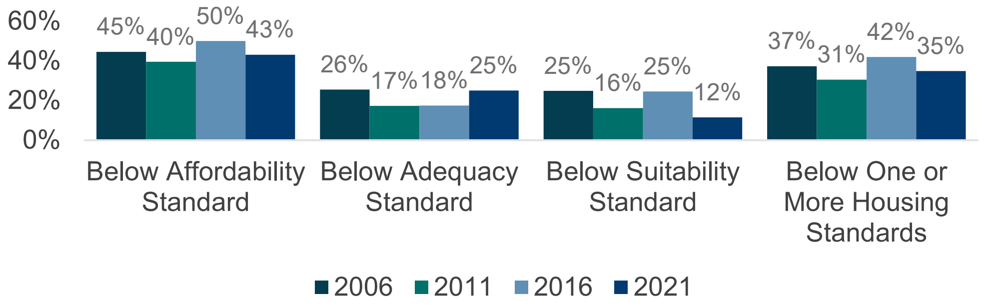
Housing Availability and Affordability Pressures

Housing affordability pressures in Pickering are intensifying, with rising home values, persistently low rental vacancy rates, and a growing share of households falling below key housing standards.

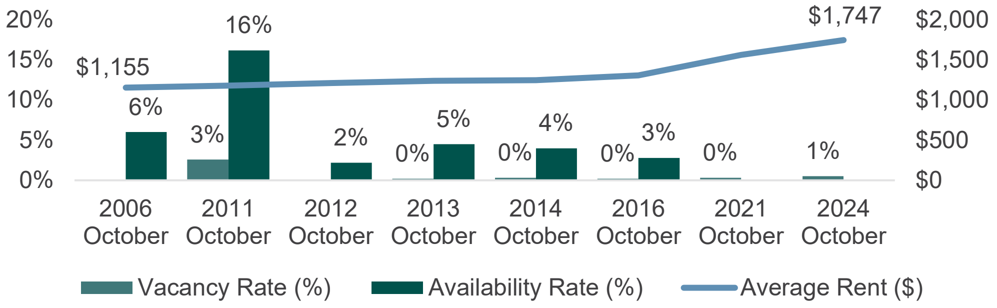
Value of Owner-Occupied Dwellings (2006-2021)



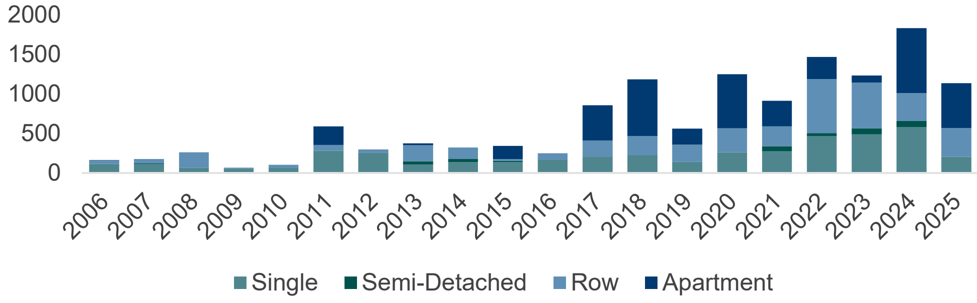
Percentage of Households in Core Housing Need (2006-2021)



Rental Availability, Vacancy, and Average Rents (2006-2024)



New Construction Starts by Dwelling Type (2006 – 2025)



Source: CMHC

Established Sectors

Pickering's economy is anchored by a few large, established sectors. In particular, energy (utilities), manufacturing, retail trade, construction, and professional and technical services stand out as the city's most significant industries by employment. These sectors collectively account for a substantial share of local jobs and business activity and provide a foundation for future diversification and growth.

Utilities (Energy)

Utilities employment is disproportionately concentrated in Pickering due to the presence of the Pickering Nuclear Generating Station (PNGS). This single facility remains one of the City's largest employers and firmly positions utilities as the City's top employment sector. In fact, Pickering's concentration of utility-sector jobs is extraordinary – roughly 16–17 times the national average (Location Quotient ~17). This reflects how Ontario Power Generation's nuclear plant dominates the local employment landscape.

Manufacturing

Manufacturing in Pickering is diverse and well-established, spanning advanced manufacturing, industrial fabrication, machinery, metal fabrication, and food and beverage processing. The sector includes both long-standing employers and newer entrants, supporting resilience and renewal. Manufacturing represents a meaningful share of total employment, approximately 3,500-4,000 jobs (~10%), and remains a core pillar of the local economy. While employment concentration is below provincial and national averages (LQ ~1.09 vs. ~1.3 nationally), the sector offers opportunities for value-added growth and modernization.

Retail Trade

As the commercial centre of Durham's western end, Pickering has a robust retail sector. Retail is one of the top employers locally, encompassing Pickering Town Centre, big-box stores, and restaurants. An estimated 5,000+ jobs (roughly 13% of employment) are in retail – a slightly higher share than the Ontario average. This is expected for a suburb with a large consumer base; however, it's notable that Pickering's retail job concentration is above both the national and provincial benchmarks (LQ ~1.2 vs Canada). In contrast, Toronto's employment share in retail is lower, highlighting Pickering's role in serving local and regional shoppers.

Construction

Construction is a well-established and growing sector in Pickering, driven by ongoing urban development, infrastructure projects, and residential and commercial construction activity. About 7 to 8% of Pickering's jobs are in construction, slightly above the typical share provincially (LQ ~1.29 vs Ontario).

Local construction firms benefit from the city's development boom. This sector's significance is also reflected in Pickering's tax base – increased commercial and residential construction helps diversify a tax base historically reliant on residential properties.

Professional and Technical Services

Professional, scientific, and technical services, including engineering, architecture, IT services, and consulting, account for approximately 6-8% of local employment. These services support key sectors such as energy, construction, ICT, and advanced manufacturing. While significant, this sector is less concentrated in Pickering than in Toronto or the province overall (LQ ~0.8 vs Canada), since many residents in these professions commute to jobs in downtown Toronto. Even so, the growth of remote work and local entrepreneurship has bolstered the presence of professional services in Pickering's economy.

Source: City of Pickering, Pickering Economic Outlook 2025, Economic Development Strategy 2022.

Sectors Poised for Growth

While Pickering's economy is anchored by established sectors, several industries are well positioned for accelerated growth based on recent employment trends, demographic shifts, and major infrastructure and investment drivers. These sectors represent key opportunities to expand job diversity, improve income capture, and strengthen long-term economic resilience.

Professional, Scientific, Technical Services

This sector has shown steady employment growth, increasing from approximately 4,180 jobs in 2016 to 4,845 in 2021 (a +16% increase). Growth reflects a rising presence of firms offering engineering, consulting, and other professional services operating in or near Pickering.

While sector concentration remains below Toronto levels, this trend signals diversification toward a more knowledge-based economy and aligns with Pickering's growing base of highly educated residents and increasing remote-work flexibility.

Transportation and Warehousing

Pickering's logistics and goods movement sector has expanded in line with regional trends. Employment in transportation and warehousing grew roughly +15% from 2016 to 2021 (from ~2,240 to 2,585 employed residents). This surge is driven by Pickering's strategic location on major highways and the development of logistics facilities.

The city's proximity to Toronto makes it an attractive staging area for goods movement. This sector's growth in Pickering outpaced the national trend, indicating a rising regional logistics hub role.

Healthcare and Social Assistance

Although Pickering has fewer local healthcare facilities than some peer cities, the sector's workforce grew by about +10% between 2016 and 2021 (from ~4,900 to 5,400 residents employed). This growth corresponds with regional healthcare expansion and an aging population driving demand.

Notably, new healthcare infrastructure in Pickering is now coming online – for example, the Jerry Coughlan Health and Wellness Centre, which opened in 2022–2023, and a planned post-acute rehabilitation hospital. These investments mean more health jobs will be located in Pickering.

Information and Culture Industries

Information and cultural industries, including film, media, telecommunications, and creative services, experienced modest overall growth (+10% between 2016 and 2021), but show strong momentum within digital media sub-sectors. Recent film productions, such as Amazon's Jack Reacher and The Handmaid's Tale, highlight Pickering's growing appeal as a filming location. Ontario's $836M film industry and the City's emerging creative infrastructure position this sector for continued expansion.

Emerging Manufacturing Niches

Within the broader manufacturing sector, food and beverage processing has been a notable growth niche. In the past few years, Pickering has landed major investments in the food manufacturing space. This is driving a burgeoning food and beverage cluster locally.

Over the last 5–10 years, Pickering has also benefited from growth in clean technology and nuclear engineering services. With the province's recent decision to refurbish PNGS's reactors instead of decommissioning, clean energy and nuclear tech remain growth industries.

Source: City of Pickering, Statistics Canada,

7.2

Employment Lands and Industrial Readiness

Employment Lands as a Strategic Lever

Pickering’s employment land inventory is one of its most important competitive assets. The strategic issue is no longer land supply alone, but readiness, phasing, and sector alignment to ensure higher impact outcomes.

1	**Brock Anchors Today**	**Brock Industrial Area supports a significant share of industrial jobs and non-residential assessment and protects the City’s current employment base.**
2	**Seaton Defines Tomorrow**	**The Innovation Corridor can prioritize advanced manufacturing, research, clean tech, and office uses to support higher jobs-per-acre outcomes.**
3	**Prestige Space Limited**	**Whites Road offers higher quality employment space, but limited remaining inventory increases the need for strategic tenant attraction.**
4	**Future Land Pipeline**	**Northeast Pickering and the Federal Pickering Lands provide long term employment land supply and an opportunity for growth, but viability depends on infrastructure timing and planning certainty.**
5	**Execution Matters**	**Coordinated delivery across Planning, Engineering, and Economic Development can help convert land capacity into near-term investment, job creation, and long-term economic returns.**

Site Readiness and Development Constraints

- While Pickering’s employment land inventory represents a strong long-term asset, development readiness varies across locations.
- Key considerations include servicing availability, transportation infrastructure requirements (e.g., road widening and access improvements), and utility capacity constraints.
- In addition, zoning alignment — particularly the distinction between general employment and prestige employment designations — can influence the type and scale of investment that can be accommodated. Addressing these factors will be critical to converting land supply into near-term investment and job creation.

Overview

Pickering's ability to attract and retain investment is tied to the availability, quality, and readiness of its employment lands. These lands are shaped by policy direction, structured into distinct categories, and influenced by delivery considerations that affect how quickly and effectively they can support economic growth.

Policy and Planning Framework

Employment lands are guided through multiple layers:

Provincial: Provincial Planning Statement

- Prioritization of housing development and requirements for long-term protection of employment lands.

Regional: Envision Durham - Regional Official Plan (ROP)

- Allocates forecasted employment growth to Pickering through 2051.
- Identifies strategic employment areas (e.g., Innovation corridor in Seaton and in the Northeast Pickering urban boundary expansion area).
- As of January 1, 2025 (Bill 23), Durham is an upper-tier municipality without planning responsibilities; the ROP now forms part of Pickering's Official Plan, with local approval authority residing with the City.

Municipal: City of Pickering Official Plan (Pickering Forward)

- Designates employment land categories and permitted uses.
- Establishes policy-level development and urban design expectations, implemented through zoning and site plan control.

Source: City of Pickering Official Plan, Durham Region Official Plan.

Employment Land Categories

Pickering's employment lands are categorized into:

General Employment

- Supports a broad range of industrial activities, including manufacturing, warehousing, etc.
- Primarily located in South Pickering (e.g., Brock Industrial Area).

Prestige Employment

- Intended for high-quality, campus-style employment uses.
- Focus on offices, R&D facilities, advanced and clean manufacturing, corporate headquarters, etc.
- Higher design standards; limited outdoor storage.
- Concentrated along major corridors (e.g., Highway 407 Innovation Corridor).

Mixed Employment

- Employment uses with complementary commercial and service functions
- Supports office, light industrial, hotels, and employment-serving amenities (i.e., all uses in prestige employment areas).
- Applied along key corridors

Key Challenges and Considerations

Several factors influence employment land readiness:

Competition Across the GTHA

- Peer municipalities are actively marketing shovel-ready employment lands.
- Opportunity: Differentiate based on location, scale of greenfield capacity, and a clear sector focus.

Coordination Across the City

- Effective delivery requires strong alignment between Economic Development, Planning and Development, and external partners.

Employment Land Supply

- While the new Provincial Planning Statement supports increased housing supply, employment lands continue to be protected under the PPS and Planning Act. However, Bill 97 and the 2024 PPS updates revised permitted uses in employment areas, and since October 2024, standalone office, commercial, and institutional uses are no longer included in the definition of employment areas.

Major Employment Nodes in Pickering (1/2)

Pickering's economic future is supported by a network of distinct current and emerging employment nodes, each playing a different role in delivering jobs, investment, and fiscal sustainability. Understanding these nodes is essential to assessing the City's industrial readiness and long-term growth potential.

Current Nodes ◆ Current and Future Node ◆ Future Nodes

Brock Industrial Area – Established Industrial Core
- Long-standing 2,147 acres of primarily industrial lands, with site-specific zoning
- Supports a broad range of industrial sectors, with strong representation in Energy, Environmental, and Engineering industries.
  - Mix of general and heavy industrial uses, including logistics and utilities
  - Anchored by Ontario Power Generation (Pickering Nuclear)
- Critical to today's employment base and municipal tax assessment

Whites Road Prestige Business Park – Specialized Node
- 52 acres of prestige industrial lands, with site-specific zoning
- Supports a range of sectors including manufacturing, distribution, R&D and warehousing, alongside head offices and a regional call centre

Seaton / Innovation Corridor – New Growth Node
- In 2016, the Province released over 1,000 acres of land in Seaton along the Highway 7/407 corridor:
  - 800 acres – Prestige Employment (Innovation Corridor)
  - 269 acres – Residential and mixed-use commercial
- The Innovation Corridor is central to Seaton's target of 35,000 new jobs, supporting a planned 2:1 resident-to-job ratio, of which about 24,000 are expected in the Corridor

Northeast Pickering and Federal Lands – Long-Term Growth Frontier
- Potential future employment area focused along Highway 407, leveraging proximity to the Seaton Innovation Corridor
- Identified need for 590 acres of additional Employment Area lands to 2051
- Approximately 9,000 acres of federally owned land in Pickering, offering significant long-term growth potential.

These nodes are complementary, not competing. Assessing each node helps determine:

- Investment Readiness
- Sector Alignment
- Job Creation Potential
- Servicing Needs
- Zoning constraints

Source: City of Pickering, Infrastructure Ontario, Northeast Pickering Secondary Plan – Employment Lands Strategy.

Major Employment Nodes in Pickering (2/2)

The map and table below illustrate the geographic distribution, servicing status, and development readiness of Pickering’s major employment nodes, both existing and planned. Together, these nodes form the backbone of the City’s industrial readiness and long-term employment growth strategy.

Legend

①	**Brock Industrial Area**
②	**Whites Road Prestige Business Park**
🟧	**Pickering Federal Lands**
🟦	**North East Pickering (NEP)**
■	**Seaton Community (Innovation Corridor within)**

Employment Node Development*

Employment Node	Servicing Status	Development Timing
Brock Industrial Area	Serviced	Development-ready / limited inventory
Whites Road Prestige Business Park	Serviced	Development-ready / limited inventory
Seaton Community (Innovation corridor)	Partially Serviced / Phased Servicing	Near-to medium-term development
NEP	Unserviced	Long-term development
Pickering Federal Lands	Unserviced	TBD

Opportunities for High-Impact Job Density & Investment

Through a high-level assessment of the major employment nodes identified on the previous slide, considering vacant land availability, servicing status, and zoning constraints highlight opportunities for high-impact job density and investment attraction, and long-term economic impact.

	Brock Industrial Area	**Whites Road Business Park**	**Seaton / Innovation Corridor**	**Northeast Pickering**
Vacant Land Availability	• Most parcels are developed. • Vacant or underutilized parcels tend to be small, infill opportunities.	• Smaller node (52 acres) with some remaining developable parcels, though not a “greenfield” like Seaton. • Vacant land is typically site-specific and parsed by parcel	• Pickering’s largest developing employment land supplies • Phase availability so that shovel-ready parcels are created over time.	• Largest future land supply; currently not built or serviced. • Planning documents support adding 590 acres of Employment Area lands as part of Pickering’s 2051 growth strategy.
Servicing Status	• Fully serviced: Water, sewage, electricity, natural gas, and telecom infrastructure are in place throughout. • Multi-modal transport exists and proximity to Highway 401.	• Business park is serviced for employment uses (water, sewer, power and communications) • Designed to support campus-style employment rather than heavy industrial	• Servicing is being rolled out in phases. Broad infrastructure (e.g., roads) has been planned and constructed on a staged basis. • Some parcels are already serviced; others are in ongoing servicing stages.	• Not currently serviced; requires infrastructure planning/investment aligned with projected timing of development. • Servicing sequencing is a key element of the Northeast Pickering Secondary Plan process.
Zoning Constraints	• Designated General Employment. • Site-specific zoning exceptions exist, reflecting permissions for individual sites.	• Employment lands here are mapped under a Designated Prestige Employment subcategory. • Site-specific zoning reinforces performance and design objectives	• Designated Prestige Employment, with higher design and employment intensity standards than General Employment. • Site plan control apply to ensure compatibility and future market preferences.	• Future employment lands are subject to a policy and zoning framework still being refined through the Secondary Plan
Opportunity	• Older industrial parcels can be updated to modern standards with higher job densities, especially in clusters • Energy and engineering cluster driven by OPG’s presence, supporting specialized suppliers and engineering pathways	• Well-positioned for mid-to high-value manufacturing, office, and R&D uses. • Strong connectivity to Hwy 401 / Hwy 407 supports logistics and last-mile functions	• Advanced manufacturing, corporate offices, R&D, agri-food, clean energy, and tech firms are the target sectors • Primary opportunity to attract job-dense, high-value employers and anchor tenants.	• Proximity to Hwy 407 and Hwy 401 via Hwy 412 positions the node for major distribution • Manufacturing and transportation clusters supported by seamless highway connectivity

7.3

Strategic Assets and Economic Anchors

Employment and Innovation Nodes

Pickering's key employment and innovation nodes include a mix of established serviced areas and emerging greenfield capacity. Near-term investment readiness can be shaped by servicing, zoning clarity, and coordinated delivery.

Brock Industrial Area:
- 2,147 acres of established industrial lands with site-specific zoning.
- Supports energy, environmental, engineering industries and is key for Pickering's employment base.

Whites Road Prestige Business Park
- 52 acres of established industrial lands, with site-specific zoning.
- Supports manufacturing, distribution, R&D, warehousing, and office spaces.

Seaton / Innovation Corridor
- 1,000 acres of land in Seaton along the Highway 7/407 corridor. Over 800 acres dedicated to Prestige Employment (Innovation Corridor)
- Critical to Seaton's target of 35,000 new jobs.

City Centre
- 55 acres of planned mixed-use redevelopment in downtown Pickering
- Supports residential, retail and commercial spaces with ~6,000 housing units planned and direct connection to major transit corridors.

Kingston Road Intensification
- Planned mixed-use redevelopment along Kingston Road supporting higher-density residential, retail, and office development in a transit-oriented growth corridor.

Key Features

✓ **Shovel-ready and serviced areas –** Employment and innovation nodes benefit from existing and/or well-planned servicing.

✓ **Zoning alignment –** Site-specific zoning mitigates approval delays for a wide variety of sectors.

✓ **Job density potential** – Large sites and planned mixed-use areas support high job densities throughout Pickering.

Institutional, Sectoral and Infrastructure Anchors

Pickering's anchor assets, supported by the broader Durham ecosystem, serve as foundational drivers of investment, employment, and long-term competitiveness.

	Sector	Major Assets	Strategic Highlights
1	Energy and Clean Tech	ONTARIO POWER GENERATION **Pickering Nuclear Generating Station**	Refurbishment to increase full power hours at PNGS. Opportunity to grow local suppliers and energy innovation pathways.
2	Agri-food	Wonderbrands	Innovative food manufacturing campus. Supports food manufacturing growth and logistics linkages.
3	Transportation/ Warehousing	Kubota	Headquarters and main distribution facility for agricultural machinery. Leverages highway connectivity and goods movement.
4	ICT/Digital Innovation	DURHAM OneNet HiTech Bay Experience the spectrum of service	Increase in high-speed internet in rural areas. Enables innovation-led firms and digital infrastructure.
5	Tourism/ Creative	DURHAM LIVE PORSCHE EXPERIENCE	Full-service film studios, theatres, and diverse attractions complement Pickering's beach, marina, boathouse, parks, and trails, supporting a vibrant visitor economy and destination development
6	Healthcare	Lakeridge Health **Jerry Coughlan Centre** **Planned Post-Acute Care Centre**	Connected and upgraded health care services. Strengthens "complete community" competitiveness and local employment

Enabling Infrastructure

Strategic investment and enhanced services in transit, highways, and digital infrastructure are strengthening Pickering's regional connectivity.

Project	**GO Transit – Lakeshore East Line**	**Highway 401 , 407 and 7 Connectivity**	**Durham-Scarborough Bus Rapid Transit (DSBRT)**	**Broadband and Digital Infrastructure**
Why it Matters	• Major commuter rail corridor serving Pickering to Toronto • Supports regional mobility and employment access	• Key east-west transportation corridor supporting goods movement, commuting, and regional travel	• Rapid transit bus corridor improving east-west regional transit and connectivity between Durham and Toronto	• High speed internet expansion enabling economic growth, remote work, and digital inclusion across Durham Region
Key Details	• Pickering Go Station located on a major GTHA corridor • Provides direct rail service between Durham Region and Toronto (Union Station) • Serves local bus terminals • ~15km extension to Bowmanville, adding 4 new stations • Improves regional labor mobility and access to Toronto's employment market • Enhances connections between Durham Region and eastern GTA, with access to VIA Rail service in Oshawa.	• 401 connects Pickering to broader Ontario and Canada • Primary freight corridor • 407 extends across Pickering and Durham Region and is toll-free within Durham, helping reduce congestion. • Planned interchange and widening improvements within Durham Region • Highway 7 widening from Reesor to Brock • High-capacity mobility route supporting economic based uses	• 36km BRT connecting Oshawa, Whitby, Ajax, Pickering and Scarborough • Dedicated bus lanes, signal priority, high frequency service • Near term implementation through local improvements • Major construction pending funding • Strengthens regional access to employment, education, and transit networks	• Driven by provincial and federal investment • Key Programs – Universal Broadband Fund, Ontario Connects, Southwestern Integrated Fibre Broadband Project • Focus on expanding service to rural and underserved areas, including parts of Pickering • Supports business attraction, remote work, and community competitiveness

Strategic Alignment with Broader Priorities

Federal, provincial, and regional priorities focused on clean energy, innovation, infrastructure, and economic resilience are closely aligned with Pickering's key projects and growth priorities.

FEDERAL

Federal priorities include:

- Building a **modern digital economy** with investments in AI and compute capacity.
- Strengthening **trade and resilience** through corridors and transportation networks.

Supporting Projects

PNGS Refurbishment

Kubota

City Centre

DURHAM OneNet

PROVINCIAL

Provincial priorities include:

- Prioritizing **clean, reliable and commercially competitive energy**.
- **Innovation corridors and economic diversification** through targeted innovation investments and funding programs.

Supporting Projects

PNGS Refurbishment

ONTARIO POWER GENERATION

Seaton/ Innovation Corridor

Wonderbrands

REGIONAL

Regional priorities include:

- **Strategic growth and employment land planning** to support job creation and population growth.
- Strengthening **investment attraction** in key sectors supported by Invest Durham.

Supporting Projects

Seaton/ Innovation Corridor

DURHAM LIVE

Lakeridge Health

7.4

Business Attraction and Retention

INVEST
PICKERING

Strengthening the Business Growth Model

Pickering has secured meaningful investment wins and benefits from strong partnerships. Building on this foundation, there is an opportunity to strengthen business navigation, aftercare, and scale-up pathways to support reinvestment and long-term growth.

1	**Investment Credibility**	**Recent wins such as Kubota, FGF Brands, Durham Live, and PNGS demonstrate strong market confidence in Pickering, and reinforce the City's credibility as a place to invest and grow.**
2	**Coordination across supports**	**Regional and local supports exist, but businesses do not always experience them as coordinated or seamless, creating friction and missed opportunities during expansion.**
3	**Predictable investor experience**	**Permitting timelines, zoning clarity, and development charges directly affect expansion feasibility.**
4	**Formalized aftercare**	**Structured follow up with expanding firms remains limited and may reduce long term retention.**
5	**Scale-up pathways**	**Mid stage firms lack targeted support to scale locally rather than relocate.**

Why does Business Attraction and Retention Matter?

Business attraction and retention are fundamental to sustaining local economic growth, job creation, and long-term competitiveness.

Economic Rationale

- **Business Attraction** introduces new employers, supports economic diversification, and signals confidence in a community as a place to invest.
- At the same time, **business retention and expansion** is equally important given that existing businesses are often best positioned to reinvest, expand operations, and generate incremental employment over time.

Beyond the economic rationale, business attraction and retention are shaped by **municipal capacity**, **evolving global investment dynamics**, and **local competitive positioning**.

1. Municipal Capacity

- In today's environment, cities are no longer passive hosts. Municipalities play a decisive role in business location, expansion, and reinvestment decisions.
- Factors largely influenced at the municipal level include:
  - Speed and predictability of approvals;
  - Clarity of processes;
  - Land and servicing readiness; and,
  - Post-investment servicing and after care.
- As competition across the GTA and beyond intensifies, active support for attraction and retention is critical for long-term investment competitiveness.

2. Global Investment Dynamics

- Geopolitical uncertainty, trade tensions, supply-chain reconfiguration, and industrial policy shifts are reshaping global investment patterns.
- Companies are increasingly prioritizing stable jurisdictions, market access, and proximity to customers, elevating the role of **foreign direct investment (FDI)** in investment attraction strategies.

3. Pickering's Competitive Positioning

- The City has taken steps to support its business base through economic development services, business navigation, and collaboration with partners, providing a foundation for business attraction and retention.
- From an FDI standpoint, Pickering has historically attracted foreign investment, including projects in logistics and recycling that delivered approximately $250M in capital investment and ~300 jobs (2017–2021).
- Building on the City's current foundation, there is an opportunity to further strengthen coordination, proactive targeting, and post-investment support for both domestic and foreign-owned firms.

Source: fDi Markets

Business Retention and Expansion Initiatives (1/2)

Pickering's business retention and expansion ecosystem is supported by a combination of City-led services and regional partner initiatives, collectively aimed at supporting existing businesses, facilitating expansion, and strengthening the local business environment.

Organization	City of PICKERING	DURHAM REGION Invest Durham	BACD Business Advisory Centre Durham
Description	Invest Pickering (the City's Economic Development & Strategic Projects department). Guides site selection and supports key sectors while advancing major initiatives that strengthen employment lands and competitiveness	Invest Durham (Durham Region's economic development arm). Its mandate is to create and retain jobs, increase non-residential assessment, and market Durham as a top place to live, work, and invest	The BACD (recently integrated with Invest Durham) offers free guidance and training to Durham Region's entrepreneurs and small businesses.
Key Initiatives	• **Business Retention Services**: Supports local businesses through corporate visitation programs (regular outreach to understand business needs) and offers site selection assistance to help companies find land or space for expansion. City staff also guide businesses through the development approvals process for expansions or relocations . • **Small Business Hub**: The City's Small Business Hub provides one-on-one consultations for entrepreneurs and existing business owners, helping navigate licensing and permits, access community resources, and address startup or expansion needs . The Hub even lends out practical items (e.g. a grand opening banner, product photography equipment, tradeshow supplies) to support business growth and marketing. • **Grand Openings and Aftercare**: Pickering coordinates Red Ribbon Cutting ceremonies for grand openings or major business milestones, inviting the Mayor, Council, and local stakeholders to celebrate the company's success . This aftercare service fosters goodwill and recognizes businesses that are expanding or investing in the community.	• **Regional Business Retention and Expansion Initiatives:** Leads region-wide efforts to retain and expand businesses. It focuses on helping larger companies grow in the region – providing support for business expansions, facilitating site selection, and promoting Durham as a prime location for investment to drive job creation and retention . The regional team works closely with area municipalities (like Pickering) to address the needs of existing industries and ensure a business-friendly environment**.** • **Durham Business Showcase:** Durham Region, in collaboration with local municipalities and partners, hosts the annual Durham Business Showcase event. This forum connects local businesses with municipal and public-sector organizations, allowing companies to showcase their products and services to potential buyers in government and related agencies . It's an opportunity for Pickering businesses to network and explore new contracts or partnerships (participation is voluntary and not an automatic award of business).	• **Small Business Advisory Services:** Its services include one-on-one business advisory meetings, business plan development support, training workshops and mentorship programs, information on entrepreneurship funding programs, and regular networking opportunities for local business owners • BACD's programs are typically free of charge, with some conditions, and are available to Pickering businesses as part of the region's business support network.)

Source: City of Pickering, Invest Durham, Business Advisory Centre Durham

Business Retention and Expansion Initiatives (2/2)

Pickering's business retention and expansion ecosystem is supported by a combination of City-led services and regional partner initiatives, collectively aimed at supporting existing businesses, facilitating expansion, and strengthening the local business environment.

Organization	Spark CENTRE	AJAX-PICKERING Board OF Trade	OntarioTech UNIVERSITY TRENT UNIVERSITY DURHAM COLLEGE SUCCESS MATTERS
Description	Spark Centre is a regional business incubator that supports early-stage and high-growth technology companies in Durham (including Pickering-based startups	The Ajax-Pickering Board of Trade (the local chamber of commerce). Serves as a central hub that unites businesses of all sizes across Ajax and Pickering to support a thriving, competitive business environment	Durham Region's post-secondary institutions (Ontario Tech, Durham College, and Trent University Durham), provide a steady pipeline of skilled talent and industry-aligned training that supports workforce development and economic growth.
Key Initiatives	• **Innovation and Startup Incubator:** It provides mentorship and advisory services, office/incubator space, and day-to-day operational support to help innovative companies scale up . Depending on the stage of the company, Spark Centre offers a range of programs, from incubation for new startups to commercialization support for rapidly growing tech firms, to drive business expansion in the tech sector .	• **Business Networking and Member Services:** Delivers programs that help retain and grow businesses through networking and advocacy. For member businesses, APBOT hosts monthly networking events and an annual Business Expo trade show to facilitate B2B connections . It also offers educational seminars/workshops, member-to-member discount programs, published membership directories, and access to a group health benefits plan – all of which add value and support the success of local businesses .	• **Post Secondary Institutions:** These institutions are key drivers of economic development by anchoring talent, innovation, and industry partnerships. In Durham, they support local employers through applied research and workforce training, helping businesses access skilled labour and adopt new technologies. For Pickering, this strengthens growth in key sectors while encouraging graduates to stay local, supporting a more diverse and resilient economy.

Source: City of Pickering, Invest Durham, Business Advisory Centre Durham

Major Investment Wins (Selected Examples)

Supported by the City's business attraction and retention initiatives, over the past decade, Pickering has secured several large, job-creating investments across priority sectors. Key examples include:

Investment	Sector	Scale/Nature of Investment	Status	Estimated Jobs
Pickering Casino Resort – Great Canadian Gaming	Tourism, Culture and Recreation	• **~$500M** entertainment destination featuring a 96,000 sq.ft., 275-room hotel, nine dining venues, and a 2,500 seat arena. • Generated over **$59.5M** in non-tax gaming revenue, with $17.2M received by the City in 2024–25 to support new projects.	Operational (since 2021)	~2000
Headquarters – Kubota Canada	Transportation/ Warehousing (equipment distributor)	• **~$80M** national headquarters comprising 500,000 sq.ft. of industrial warehouse space and 65,000 sq.ft. of office, meeting and training space.	Operational (since 2022)	200
Industrial Complex – SmartCentres	Industrial and Logistics	• **~$70M** industrial development totaling 233,000 sq ft; including 130,000 sq.ft. head office and distribution centre.	Operational (since 2023)	+200
Pickering Nuclear Refurbishment – Ontario Power Generation	Clean Energy and Nuclear Innovation	• **~$26.8B** refurbishment investment to extend the operating life of the Pickering Nuclear Generating Station and meet Ontario's future energy demand. This includes infrastructure renewal and growth of Ontario's nuclear supply chain.	Currently in definition phase, Project execution expected to begin in 2027	Over entire project life: ~7,500 jobs/ year. Refurbishment period: ~30,500 jobs/year
Film and TV Backlot – Sunbelt Rentals	Digital Media and Creative Industries	• Lease of city-owned lands for a purpose-built backlot • **~$1.8M** in lease revenue to the City ($30,000/month from 2021 to 2026)*.	Operational (agreement finalized 2021)	N/A
Wonderbrands Innovation Business Park – FGF Brands	Agrifoods	• Positioned as a major GTA food manufacturing hub. • **Purchase of 151 acres** in the Innovation Corridor to support three manufacturing plants and a distribution centre.	Under development (announced 2023)	~3,000
Experience Centre – Porsche Canada	Tourism, Culture and Recreation	• **Multi-million-dollar** national flagship experience centre with track, training and showroom.	Operational (launched 2025)	~65 jobs

***Note: Sunbelt Rentals requested a rent decrease to $17,000, and council voted to accommodate the reduction. Sector segmentation determined by City of Pickering**

Sources: City of Pickering, News Wire, Kubota Canada, Invest Durham, TriBro Studios, Porsche Newsroom, Canadian Business, Durham Region, fDi Markets, Spark Centre, Durham College, World Bank, OECD, International Canada, Statistics Canada

Gaps and Opportunities

Building on the current-state assessment, the following gaps and opportunities highlight areas where Pickering can strengthen its approach to business attraction, retention, and expansion.

Gaps in Pickering’s Support	Lessons Learned	Opportunity for Pickering
No dedicated business navigation role. Lack of a one-stop, single-point-of-contact to guide new or expanding businesses through municipal processes.	• Municipal “investment concierge” models (e.g., Vaughan) provide hands-on support across approvals, servicing, and permitting, improving investor experience and speed to market.	• **Explore creating a business navigator/concierge function as a one-stop guide for companies**. A single contact who can help firms access City services and navigate permits and approvals. This could streamline the experience for investors and expanding businesses, improving ease-of-doing-business.
Limited post-investment servicing (aftercare). No formal “aftercare” program to support businesses after they invest or expand in Pickering.	• Many municipalities integrate investment aftercare into economic development. For instance, North Bay’s economic development department explicitly provides ongoing investment aftercare support for investors, alongside business retention and expansion initiatives. • This ensures businesses continue to receive help beyond the initial setup phase.	• **Potential to establish a post-investment aftercare process**. For example, regular check-ins or a support program for recently arrived or expanded companies. Pickering could coordinate follow-ups to promptly address any issues (permits, utilities, workforce needs, etc.), helping new investors feel supported and encouraging them to stay and grow.
Lack of structured scale-up support. Few tailored services for companies that have moved beyond start-up stage and need help scaling operations (e.g. entering new markets, finding talent or capital).	• Other jurisdictions offer scale-up programs to retain and grow local firms. London, for example, provides scale-up support through its economic development organization, connecting growing businesses with mentors, specialized training, market research assistance, talent pipelines and funding opportunities. • Such initiatives help mid-sized firms overcome growth hurdles and continue expanding locally.	• **Potential to develop scale-up support initiatives** (possibly in partnership with regional agencies or incubators). Pickering could consider targeted services for second-stage companies – for instance, mentoring networks, “scale-up” workshops, or assistance in accessing expansion financing and talent – to help local businesses grow to the next level.
No locally anchored incubator or accelerator facility. While entrepreneurs in Pickering can access regional innovation supports, the City does not currently host a dedicated incubator or innovation hub, which may limit opportunities to anchor start-ups locally.	• Many similar communities support incubators or co-working hubs to foster business growth. Durham Region, for example, hosts the Spark Centre incubator in Oshawa – a “one-stop shop” offering coaching, mentorship, networking and funding connections to support start-ups and anchor them in the region. Entrepreneurs may also access additional innovation support through organizations such as YSpace, VentureLAB (sector-focused), DMZ, and R-Labs.	• **Opportunity to partner in creating an incubator or co-working space** in Pickering. By exploring collaborations with regional innovation centers, post-secondary institutions, or the private sector, the City could establish a local hub for start-ups. This would give emerging businesses a reason to launch and grow in Pickering (instead of relocating), strengthening the pipeline of home-grown companies without making a formal City-run program.

Sources: Vaughan Business, North Bay Economic Development, London Economic Development Corporation, Spark Centre

7.5

Trade Diversification and Supply Chain

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Managing Trade and Supply Chain Risk

Pickering's sectors face different levels of trade and supply chain exposure. Resilience strategies must reflect those differences rather than apply a single approach.

1	**Export Exposure High**	Advanced manufacturing and agri-food firms are more reliant on U.S. markets and imported inputs, increasing tariff vulnerability.
2	**Logistics Volume Sensitivity**	Transportation and warehousing are directly affected by cross-border trade fluctuations.
3	**Energy Relatively Stable**	Nuclear and clean energy rely on global components but benefit from long-term contracts and public-sector investment.
4	**Service Sectors Resilient**	Healthcare and Digital Innovation services are primarily domestically driven, reducing exposure to international trade shocks and tariff risk.
5	**Local Supplier Linkage Critical**	Increasing participation of Pickering based firms in PNGS and other major projects strengthens local resilience.

External Trade Vulnerability Analysis

This analysis examines sector-level exposure to global trade disruption and tariff risks, identifying Canadian industries most vulnerable to external shocks and those with greater resilience.

Context

- External trade and tariff risk tends to concentrate in sectors that are simultaneously:
    - Import intensive
    - Export Oriented
    - Highly concentrated
    - Integrated into cross border value chains
- OECD analysis shows that exposure in global value chains is highest where industries rely on foreign inputs from a limited number of countries or suppliers, increasing the risk of cascading disruptions.
- Similar analysis from Global Affairs Canada's Office of the Chief Economist finds that Canadian manufacturing is especially vulnerable to international supply chain shocks, while retail and other service sectors are less exposed due to their stronger domestic focus.

Sectors most exposed to international trade and tariff risks*

- **Automotive**
- **Machinery and Equipment Manufacturing**
- **ICT and Electronics Hardware**
- **Industrial Commodities**
- **Consumer Goods Manufacturing**
- **Agri-food**

Sectors generally more resilient to global trade disruptions*

- **Local Services / Place Based**
- **Digital Innovation Industries (including AI)**
- **Tourism**
- **Digital Media and Creative Industries**
- **Healthcare**

Note: Sector naming conventions were identified by the City of Pickering. KPMG mapped these to the corresponding sectors based on desktop research.
Sources: City of Pickering, OECD, Statistics Canada, Government of Canada

External Trade Vulnerability

Pickering's economic growth is driven by a mix of sectors that vary in their exposure to international trade and supply chain disruption. Understanding where trade sensitivity is highest versus where the local economy is more resilient helps inform targeted investment attraction, retention, and risk mitigation strategies rather than a one size fits all approach

Sector	Exposure	Description
Advanced Manufacturing	⊕	• Advanced manufacturing activities in Pickering that are integrated into global value chains face high exposure to trade and tariff risks because they depend on complex, cross-border flows of intermediate inputs and components.
Digital Innovation Industries	◐	• Relies primarily on local talent, intellectual property, and digital infrastructure rather than physical supply chains.
Agri Foods	⊕	• Agri-food operations in Pickering, particularly large-scale food manufacturing and distribution, are exposed to trade risk due to their reliance on both imported inputs (ingredients, packaging, processing equipment) and export markets, often with high concentration in the United States.
Film/TV Production	◐	• Fundamentally a service-based activity that relies on local labor, facilities, and location assets rather than imported physical inputs.
Healthcare Delivery and Local Services	◐	• Healthcare delivery and other locally oriented services in Pickering are generally low-exposure sectors because they are driven by domestic demand and delivered within the local or regional market.
ICT	◕	• ICT Firms involved in hardware manufacturing, electronics assembly, or device-dependent production are more exposed due to reliance on imported components and globally concentrated suppliers.
Nuclear/Clean Energy	◕	• While core operations and services are domestically delivered and heavily regulated, many specialized components, capital equipment, and engineering inputs are internationally sourced. But the long planning horizons and public sector involvement provide some buffer.
Transportation and Logistics	⊕	• Transportation and logistics activities in Pickering are highly exposed to international trade volatility because their business volumes, margins, and investment decisions are directly tied to the flow of cross-border goods.

Scoring legend

⊕ **High exposure**: trade-sensitive and globally integrated (e.g., logistics, agri-food exports).

◕ **Moderate exposure**: Mixed risk depending on supply chain depth

◐ **Low exposure**: Domestically driven or IP-intensive

Sources: City of Pickering, OECD, Statistics Canada, Government of Canada

7.6

Benchmarking Scan

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Benchmarking Key Findings

Benchmarking against peer municipalities indicates that Pickering is strongly positioned in employment land availability, regional connectivity, and baseline business costs. At the same time, the analysis highlights targeted opportunities to strengthen healthcare infrastructure and business competitiveness tools.

Increasing Competitiveness

Land Availability

- **Pickering leads comparator municipalities in available employment land**, with 590 acres identified in Northeast Pickering for development and greenfield capacity in the Seaton Innovation Corridor to support 35,000 new jobs.
- This represents a **scarce, strategic advantage** within the GTHA, where many peers are largely built out and increasingly reliant on intensification.

Transit Access

- **Strong multimodal connectivity** through GO Transit and Durham Region Transit supports regional labour access and business mobility.
- The planned **Durham–Scarborough Bus Rapid Transit (BRT) corridor** can strengthen east–west connectivity and improve access to key employment areas over time.

Business Incentives and Baseline Costs

- Pickering remains competitive on overall business costs supported by lower land and operating expenses relative to many GTA peers.
- However, some comparator municipalities are more proactive in deploying **municipal cost-relief and competitiveness tools** where permitted under legislation (e.g., targeted DC waivers/deferrals, fee reductions, tax rate differentials, and CIP-based programs) to catalyze employment development.

Healthcare Infrastructure

- The absence of an in-city hospital creates a **perceived and practical gap in community infrastructure**, requiring reliance on neighbouring municipalities for acute care.
- The planned health centre is a positive step, but broader healthcare capacity will be increasingly important to support **talent attraction, retention, and sector growth** as the City scales.

Note: Municipalities are generally restricted from providing direct financial assistance (‘cash’ grants/loans) to businesses unless expressly authorized by legislation (e.g., Community Improvement Plans). References to ‘incentives’ in this report refer to cost-reduction tools (taxes, fees, DCs, legislated programs) and baseline cost structures.

Comparator Municipalities

To assess Pickering's competitive position, five jurisdictions were selected as municipal comparators by the City based on geographic proximity, market overlap, and shared urban and economic characteristics. The primary purpose of the comparative analysis is to benchmark Pickering's strengths and challenges relative to similar and neighbouring jurisdictions across the GTHA.

Municipality	Population Served[1]
City of Pickering	99,186
City of Markham	338,503
City of Oshawa	175,383
City of Mississauga	717,961
City of Brampton	656,480
City of Toronto	2,794,356

Research Tactics

- ✓ Documentation review
- ✓ Desktop research

Research Focus Areas

- ✓ Benchmark Pickering's competitiveness to other local municipalities
- ✓ Specific topic areas identified during KPMG's engagement with City's Project Team

Source: Statistics Canada. Census Profile, 2021

Note: Given this is a census year, the data presented are drawn from the most recent available census and may be somewhat outdated..

Comparative Analysis (1/2)

The table below compares Pickering and peer municipalities across three core dimensions that influence non-residential investment decisions: business cost competitiveness tools, employment land availability, and transit access. Together, these factors shape relative attractiveness for business attraction, expansion, and reinvestment.

Comparator	Business cost competitiveness tools	Employment Land Availability	Transit
City of Pickering	No City-run direct incentive program; competitiveness is driven by baseline costs and access to regional/ provincial/ federal programs. Any local financial tools would be delivered through legislated mechanisms (e.g., CIPs), where applicable.	590 acres of land for future development in Northeast Pickering and developable parcels within the 800 acres of prestige employment land in the Seaton Innovation Corridor (phased servicing; shovel-ready parcels available). Major greenfield capacity – targeting 35,000 future jobs.	Served by Go Transit and Durham Region Transit – bus routes city-wide (hourly to 15-min service on main routes); future BRT on Hwy 2. Relatively car-centric currently.
City of Markham	No municipal grants; emphasizes low commercial property taxes (≈0.78% – lowest among peers) and supports firms in accessing provincial/federal programs	Built-out – minimal vacant employment land (urbanized). Relies on intensifying existing parks. (Had ~485 ha vacant in 2006, mostly unserviced).	York Region Transit + Viva BRT (frequent service on Hwy7/ Yonge); multiple GO stations. Direct TTC bus connections to Yonge and Sheppard lines.
City of Oshawa	Targeted CIP tools and cost-relief measures: reduced/waived City DCs in specific areas (e.g., downtown / targeted employment builds), façade improvement programming (CIP), and Urban Growth Centre measures to encourage high-density projects.	Northwood Business Park – 700+ acres greenfield industrial (by Ontario Tech). Now servicing and marketing to investors (recent 1M sq.ft. logistics site opened).	Durham Region Transit hub; local routes (lower frequency); DRT Pulse BRT on Hwy 2 connecting through Pickering.
City of Mississauga	Has a Downtown CIP that provides tax increment–based support and fee reductions to spur office development. Can be stacked with Peel Region's major-office programming, increasing overall cost relief for qualifying projects.	Nearly built-out – <5% employment land vacant. Established parks (Meadowvale, etc.); growth via redevelopment.	MiWay bus network (90+ routes) with direct TTC connection; dedicated Transitway BRT; new 18-km Hurontario LRT opening (improved local mobility).
City of Brampton	Aggressive cost-relief toolkit: 100% Development Charge waiver for new offices; 10-year CIP-based tax increment support for offices and mixed-use developments; and DC exemptions for industrial expansions.	Moderate lands remaining – large tracts in Northwest Brampton and along Hwy 427. Peel inventory shows significant vacant acreage (e.g. Heritage Heights area).	Züm BRT routes on major corridors with direct TTC connection; extensive local bus coverage; future LRT extension.
City of Toronto	City-wide IMIT property tax relief program (being replaced): offered property tax reductions for 10–12 years on eligible new office/industrial projects. Over 70 projects used IMIT (now winding down for offices due to cost).	Limited land – no large greenfields; focuses on brownfield redevelopment (e.g. East Harbour site for offices).	Well connected as the transit hub in southern Ontario.

Source: City of Pickering; Northeast Pickering Secondary Plan (Employment Lands Strategy); Google Maps (2026).

Comparative Analysis (2/2)

The table below examines healthcare infrastructure, digital connectivity, commercial and industrial tax rates, and development charges across Pickering and comparator municipalities. Together, these factors influence talent attraction, business operating costs, and investment feasibility.

Comparator	Healthcare	Broadband	Commercial Taxes	Industrial Taxes	Development Charges and Other Costs
City of Pickering	No hospital in-city (nearest in Ajax). New health centre planned.	City-wide fibre/5G expanding – Durham OneNet extending fibre to business parks.	2.4%	3.0%	City non-res DC: \$10.63/ft^2 (~\$114/m^2) (Jul 2025–Jun 2026, excl. Seaton) + Durham Region and school DCs. DC deferral available for commercial/industrial (to occupancy; up to 3 yrs).
City of Markham	One hospital – Markham-Stouffville Hospital	High-speed broadband widely available in urban areas (Markham/ Mississauga/ Brampton have extensive fibre in business districts).	1.6%	1.8%	High DCs (York Region). Total non-res DC (IOI) ≈\$595/m^2 (Jan 1, 2026); retail/hotel higher. Area-specific DCs apply in select areas; rates indexed per by-law.
City of Oshawa	One hospital: Lakeridge Health Oshawa		2.7%	3.6%	Targeted exemptions: Downtown Core UGC (Core Area) = \$0 City DC; industrial new/expansion exempt; medical clinic space 100% City DC discount. Durham Region and school DCs apply.
City of Mississauga	Two major hospitals: Mississauga Hospital, Credit Valley Hospital		2.08%	2.2%	Non-res DCs (Feb 1–Jun 30, 2026): total ≈\$391/m^2 industrial, ≈\$490/m^2 non-industrial (City+Peel+schools) + Stormwater Mgmt DC (\$5,922/ha). Rates indexed semi-annually.
City of Brampton	Two hospitals: Brampton Civic Hospital, Peel Memorial Centre		2.1%	2.3%	DCs (Feb 1, 2026, City+Peel+schools): industrial \$380/m^2; non-industrial \$552/m^2; major office \$751/m^2. Office DC program waives 100% of City portion. Parkland cash-in-lieu: 2% land value.
City of Toronto	30+ hospitals		2.2%	2.3%	Non-res DC: \$838/m^2 (May 1, 2025; ground-floor GFA only). CBC may apply (4% of land value for 5+ storeys and 10+ units). Planning fees are high (ZBA base ≈\$63.7k in 2026).

Source: City of Pickering; Northeast Pickering Secondary Plan (Employment Lands Strategy); Google Maps (2026).

08

Appendix B: Detailed Stakeholder Insights

8.1

Interview Results

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Stakeholder Segmentation

To ensure coverage of the City's full economic system, stakeholders were segmented into four distinct but interconnected groups. This structure supports targeted engagement, clear role definition, and balanced input across policy, industry, and delivery partners.

Strategic Players

- Mayor and Council
- Chief Administrative Officer (CAO)
- Relevant City Staff

Industry Leaders

- Large/Key Businesses:
- OPG (Pickering Nuclear Station)
- Other anchor employers
- Development Community

Local Businesses

- Small Business Community that includes representatives from key sectors including:
  - Advanced Manufacturing;
  - Food processing;
  - Logistics;
  - Technology;
  - Creative Industries; and other locally rooted sectors.

Enablers

- Ajax-Pickering Board of Trade (APBOT)
- Invest Durham

Topic Areas for Engagement

Engagement topics were tailored by stakeholder group to ensure feedback captured strategic direction, market realities, business needs, and ecosystem alignment. This structure enables focused discussions while surfacing cross-cutting insights relevant to the Economic Development Strategy.

	Strategic Players	Industry Leaders	Local Business Representatives	Enablers
Potential Interview Themes	• Vision and priorities for the Economic Development Strategy • Policy and regulatory alignment • Existing and planned infrastructure investment • Perspective on City’s role and responsibilities	• Sector competitiveness and investment climate • Expansion and diversification opportunities in anchor and growing industries • Supply chain resilience • R&D and commercialization opportunities	• Business retention and expansion priorities • Small businesses and entrepreneurship supports • Digital transformation and local supplier networks	• Workforce training and education alignment with industry demand • Investment attraction, marketing and site readiness • Academic-industry partnerships
Cross-Cutting Themes	• Quality of life factors / Competitive differentiators	• Local challenges, opportunities and priorities		• Strategic partnerships and advocacy

What We Heard: Cross-cutting themes from interviews (1/2)

Major projects are once-in-a-lifetime opportunities

- Projects are transformational catalysts, however, must maximize local jobs, supplier participation, tax-base growth.
- Projects often use “all-or-nothing” procurement models, which can limit participation by qualified local suppliers.
- Better City coordination and readiness (e.g., land, servicing and approvals) to capitalize on opportunities.
- Need to better anticipate and manage impacts (e.g., construction disruption, skill shortages and infrastructure strain).

Enhancing Pickering’s brand can support talent and investment attraction

- Pickering’s economic strengths are not consistently understood (externally and internally).
- Clearer positioning about City’s comparative advantages (e.g. sectors, location, quality of life).
- Growth nodes need a coherent “sense of place” narrative (including the downtown/destination experience).
- Support for aligning investment/tourism/visitor attraction, and business outreach under a more unified narrative.

City should enhance role as a “connector” within the economic ecosystem

- Stakeholders value the City acting as a connector and facilitator, beyond a regulatory role.
- Need for more deliberate coordination among City, Region, education/training partners, and employers.
- Facilitate more opportunities for local business networking to strengthen supplier visibility and collaboration.
- Stronger senior-government alignment to better unlock funding opportunities, as well as more closely coordinate infrastructure and policy support.

What We Heard: Cross-cutting themes from interviews (2/2)

Talent and workforce constraints emerging as growth limit

- Skilled trades and technical talent shortages, driven by recruitment, retention, and wage competition.
- Major capital projects and anticipated future population growth, are raising concerns about local capacity and cost escalation pressures.
- Workforce pipeline partnerships (secondary, post-secondary, training providers) critical to growth and local hiring.
- Housing supply/affordability and transit service (esp. First/Last-Mile) critical to early-career talent attraction/retention.

"Enablement" matters: Navigating City processes remains challenging.

- Smaller firms noted challenges managing approvals alongside day-to-day operations – highlighting need for clearer guidance.
- Strong interest in greater transparency around requirements, timelines, and sequencing to reduce investment risk.

Site readiness and infrastructure sequencing are critical to competitiveness

- City's supply of large employment lands is a key strategic advantage; however, servicing, zoning clarity, and site readiness will increasingly determine near-term investment uptake.
- Not all employment areas are equally "investment-ready". Align land availability with infrastructure capacity and intended uses.
- Digital infrastructure gaps in some areas a constraint for advanced manufacturing, engineering, and tech firms.
- Outcomes linked to the timing/coordination of infrastructure delivery (roads, utilities, transit).

What We Heard: Internal City Stakeholders (1/2)

Economic development success is expected to translate into tax-base results

- Boosting Investment Attraction efforts to increase the City's share of non-residential tax revenue
- Strategy must include clear objectives, benchmarks, and progress tracking, moving beyond activity-based reporting to outcomes.
- Communicating how economic development benefits residents is critical to maintaining public support.

Major projects are viewed as long-term economic platforms, not standalone wins

- Projects such as the nuclear refurbishment and clean-energy investments described as multi-decade economic platforms, with impacts extending well beyond direct employment.
  - Leveraging these platforms to attract supply-chain firms, professional services, and post-secondary partnerships to reinforce Pickering's role as a clean-energy hub.
- Major projects are foundational assets that anchor the City's long-term positioning and investment narrative.

Employment lands strategy must balance near-term delivery with long-term pipeline

- Accelerating absorption of existing employment lands (e.g. in the Innovation Corridor), with an emphasis on uses that generate jobs and tax yield, not just land take-up.
  - In addition, early and deliberate planning for future employment lands (e.g., Northeast Pickering and federal lands) to avoid future supply constraints.
- Decisions made in the next 5–10 years critical to sustaining Pickering's competitiveness over the next generation.

What We Heard: Internal City Stakeholders (2 /2)

Sector diversification is a priority, with a shift toward higher-value employment

- Prioritize technology, AI/cybersecurity, advanced manufacturing, and clean-energy-related sectors, as they are more resilient with higher-impact growth opportunities.
- While logistics, warehousing, and data centres generate taxes, they are low job-intensity uses.
- Strive for a more diversified industrial base, one that strengthens economic resilience and workforce quality.

Workforce competitiveness depends on access, affordability, and education

- Business attraction and retention linked to adequate workforce access/mobility - transit connectivity within the City (including for shift workers) needs to be enhanced.
- Housing supply and affordability, particularly enabling workers to live closer to jobs, were identified as increasingly important to Pickering’s competitiveness.
- Post-secondary education presence needed in the City to build a future-ready workforce and support city-centre vitality.

Execution success requires infrastructure readiness and deal-closing agility

- Infrastructure capacity (water, wastewater, energy, transportation) identified as a limiting factor in some locations, directly affecting shovel-readiness and investment timelines.
- Need for efficient, coordinated and predicable approval process. Pickering’s concierge-style approach is a competitive advantage to build on.
- Stronger alignment with provincial and federal partners essential in an increasingly competitive investment environment.

What We Heard: Local business/enabler stakeholders (1/3)

Cost competitiveness is influencing business investment and growth decisions

- Rising operating costs (taxes, utilities, labour, and regulatory burden) are putting growing pressure on competitiveness. Fixed costs and limited flexibility can constrain growth even when demand is strong.
- Property tax treatment/classifications can impact decisions to expand and/or shift incremental investment elsewhere.

Transportation and mobility constraints are a persistent challenge

- Traffic congestion and limited transit access around major employment areas is challenging, (particularly along Brock Road, Kingston Road, and near Highway 401 interchanges). Other areas include: Granite Court, and Bayly Street, where congestion, construction sequencing, and limited alternative routes affect employee commutes and goods movement.
- Last-mile gaps between GO stations and workplaces remain a challenge. Employees can reach Pickering by regional transit but face difficulty completing the final leg of their commute.

Workforce availability is a strength, but talent gaps and competition are increasing

- Pickering and Durham Region provides a diverse and capable labour pool, with a range of professional, technical, and operational talent.
- However, growing difficulty attracting and retaining specific skills, including skilled trades (e.g., welders, machinists, industrial fabricators), engineers and technical professionals (including environmental, process, and manufacturing engineers), project managers and nuclear-adjacent roles as investment projects advance.
- Competition from large employers and major projects, combined with housing affordability and commuting challenges, intensifies pressure on small and mid-sized firms.

What We Heard: Local Business/Enabler Stakeholders (2/3)

Permitting, approvals, and zoning: Complex and time-intensive

- Permitting and approval timelines are slow and difficult to navigate, even for small expansions or facility changes.
- Limited clarity and predictability were viewed as discouraging reinvestment or expansion within Pickering, particularly when compared to other jurisdictions.

Businesses want more practical, locally focused support to help them grow

- More accessible procurement opportunities, including approaches that allow qualified smaller firms to participate in local supply chains.
- Enhance opportunities for local networking, supplier showcases, and industry events.
- Opportunity for local incubator, co-working, and flexible office space for small businesses, home-based firms, and early-stage entrepreneurs looking to scale and professionalize.

Enhance "open for business" platform to increase visibility and impact

- Pickering's economic development function is highly responsive, capable, and investor-ready, reinforcing confidence among regional partners and investors.
- Awareness and uptake of existing business supports described as uneven, particularly among small and early-stage firms, suggesting a communications and outreach opportunity, rather than a service gap.
- More proactive and visible engagement (e.g., business visits, storytelling, and promotion through City channels) was seen as a practical way to strengthen relationships and signal accessibility.

What We Heard: Local Business/Enabler Stakeholders (3/3)

Modern office space can enable business growth and talent retention

- There is untapped potential to retain professionals who live in Pickering but commute elsewhere, particularly if modern, high-quality workspace options were available locally.
- This opportunity aligns with broader ambitions for City Centre and downtown evolution, where flexible workspace, creative uses, and amenities could support entrepreneurship, innovation, and younger talent attraction.

Major catalysts and employment lands are key competitive advantages

- Large-scale projects, like the nuclear refurbishment, are already generating tangible investment interest and supply-chain activity, reinforcing Pickering's role in clean energy and advanced engineering.
- Pickering's availability of large, serviced employment lands was identified as a core competitive advantage within the region, particularly for industrial and advanced manufacturing opportunities.
- Importance of tight regional–local coordination to fully capitalize on these advantages, including:
  - Clear, current employment-land and site data for marketing and investor responses
  - Aligned investment attraction and lead-handling processes
  - Continued attention to enabling infrastructure and mobility as growth accelerates.

8.2

Survey Results

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Survey Methodology

To complement stakeholder interviews, two digital surveys were conducted, one targeting local businesses and the other City staff, to capture broader perspectives and validate themes emerging from earlier engagement activities.

Objectives*

- Better understanding of local challenges, opportunities and priorities through broad engagement
- Validate perspectives brought to light during engagement focus groups.

Approach

- Targeted survey questions to complement stakeholder discussions.

Target Audience

- Local businesses
- City staff

Question Format Considerations

Question Type	Use Case
Multiple Choice	• Measures preferences and opinions • Demographic information
Rank Order	• Prioritization of preferences • Helps to understand relative importance
Sliding Scale	• Capture opinions or feelings

TIMELINE

January 2026 – February 2026

***Note:** The surveys were used as a supplementary research tool to gather general perspectives and insights. They are not intended to serve as a definitive or statistically scientific dataset, but rather to inform, corroborate, and contextualize engagement findings.

Survey Overview

To inform Pickering's 2026–2030 Economic Development Strategy, the City launched two aligned digital surveys to capture perspectives from both the local business community and City staff. Together, these surveys provide broad-based input to help shape clear priorities and actionable directions for the next five years.

Survey Approach

- The City launched two coordinated surveys:
  - Public survey targeting Pickering-based businesses and employers
  - Internal survey for City staff (shorter version with aligned core questions)
- Questions were tailored to Pickering's local context and strategic objectives to ensure relevance and practical insight.
- The surveys used a mix of multiple choice, ranking, and open-ended questions to capture both measurable priorities and detailed feedback.
- Responses were analyzed across both audiences, with business results segmented where possible (e.g., by industry and employee size) to identify patterns and differences.

The survey questions were organized into the following key themes to guide and structure input into the development of the long-term Strategy:

Business climate: Analyzes the perceptions of strengths, challenges, and factors influencing growth and investment.

Workforce and talent: Investigates hiring conditions, skills gaps, and retention considerations.

Real estate and land supply: Examines availability, affordability, and suitability of space.

Transportation and Mobility: Assesses access, congestion, goods movement, and transit.

Quality of Life: Evaluates amenities, housing, safety, and overall attractiveness to talent.

City services and support: Reviews satisfaction with programs, processes, and business engagement.

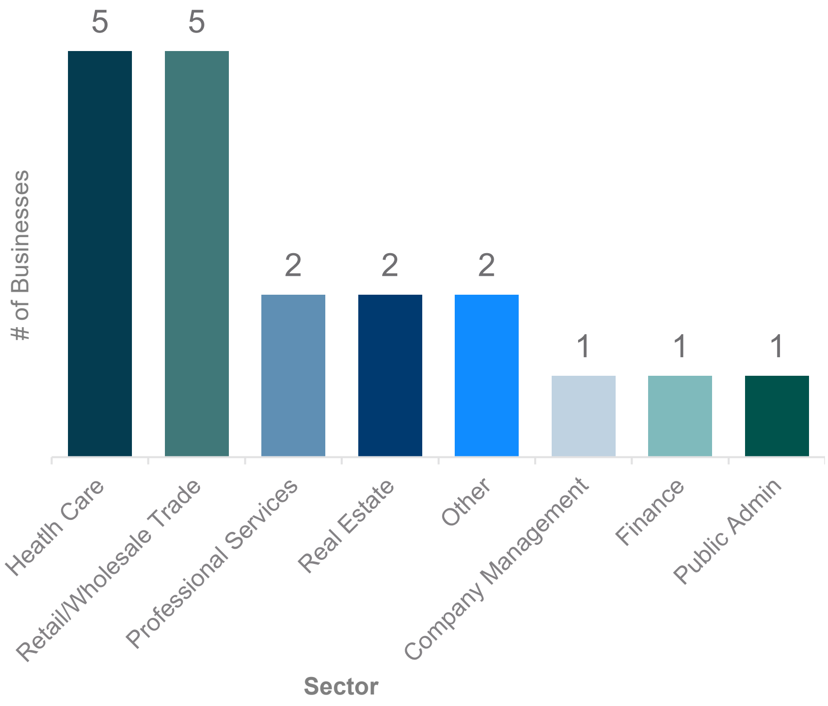
Future Growth and Economic Development : Explores future economic growth drivers, priority sectors, growth opportunities, and top strategic actions for 2026–2030.

***Note:** Several survey questions allowed respondents to select multiple answers. As such, percentages are calculated based on the number of respondents rather than the number of individual responses, which may result in total percentages exceeding 100%.

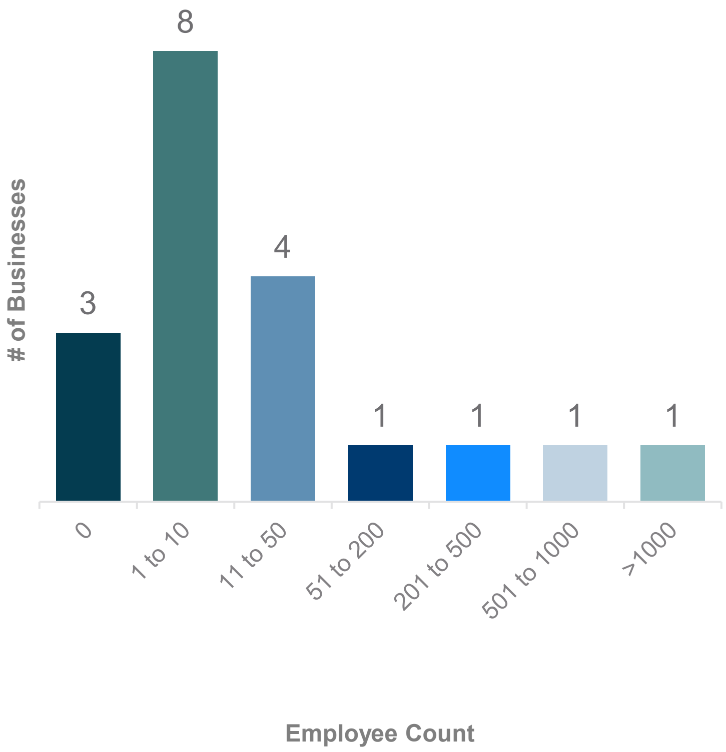
Who We Heard From

Business Survey – Sector Coverage and Employment

Number of businesses per sector



Number of businesses per employee count



Key Insights

43

Total Survey Responses

24

City Staff Response

19

Business Responses

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Key Survey Themes

Based on survey responses, the following themes emerged as priority issues and opportunities shaping Pickering's future economic growth and prosperity.

Overall Sentiment and Business Climate

- Business sentiment is mixed, with views split between business-friendly and challenging conditions.
- Staff generally perceive Pickering as competitive relative to nearby municipalities.
- Strong business retention, with most respondents indicating they would remain in Pickering if expanding.
- Opportunity to strengthen consistency and predictability of the business experience.

Key Strengths and Competitive Advantages

- Strategic location and regional connectivity widely recognized as core strengths.
- Access to markets and customers identified as a key advantage by businesses.
- Growing population and development momentum seen as positive economic drivers.
- General alignment that Pickering's location and connection to key markets underpins long-term competitiveness.

Primary Barriers and Constraints to Growth

- Traffic congestion and transportation limitations identified as major constraints.
- Infrastructure capacity and servicing readiness viewed as limiting growth potential.
- Cost pressures, regulatory complexity, and permitting timelines raised by businesses.
- Internal capacity, coordination, and legislative constraints noted by staff.
- Some divergence between strategic priorities and business operational concerns.

Top Strategic Priorities for the Next 5 Years

- Improve transportation infrastructure and address congestion.
- Strengthen the business-friendly environment through clearer processes and responsiveness.
- Advance major projects, with differing emphasis between staff and businesses.
- Support workforce attraction, retention, and affordability.
- Unlock serviced employment lands to enable long-term growth.

Where Perspectives Align — and Where They Differ

Areas of Strong Alignment

Location and Connectivity: Both businesses and staff consistently recognize Pickering's strategic location and regional connectivity as a foundational economic strength.

Congestion and Transportation: There is clear agreement that traffic congestion and transportation system limitations are key constraints that must be addressed to support future growth.

Infrastructure Capacity/Servicing: Business and staff are aligned that infrastructure capacity and servicing readiness are critical enablers of economic development and current constraints on expansion.

Areas of Divergence

Innovation Corridor Priority: City staff place significantly higher emphasis on the Innovation Corridor as a transformative project, whereas businesses rank it lower relative to more immediate, operational priorities.

Healthcare Facility Gap: Businesses assign greater relative importance to healthcare-related projects, highlighting the connection to workforce attraction, talent retention, and overall community livability.

Perception of the Business Environment: Staff tend to view Pickering's competitiveness more positively, business sentiment is more divided, reflecting differing experiences of the local operating environment.

Business Environment and Competitiveness (1/2)

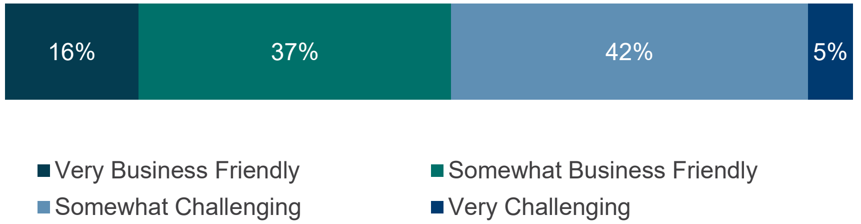
Sentiment around Pickering's business environment is mixed but generally viewed as fundamentally viable, with businesses split between seeing it as business-friendly and challenging. Staff perceive Pickering as generally competitive within the Region, but recognize structural gaps that may limit its ability to outperform peer municipalities.

Key takeaways

Business Environment

- Overall, there is mixed sentiment towards the city's business environment 53% of respondents identified Pickering's current business environment as very or somewhat business-friendly.
- However, 47% describe it as somewhat or very challenging, indicating room for improvement in creating a more supportive environment.

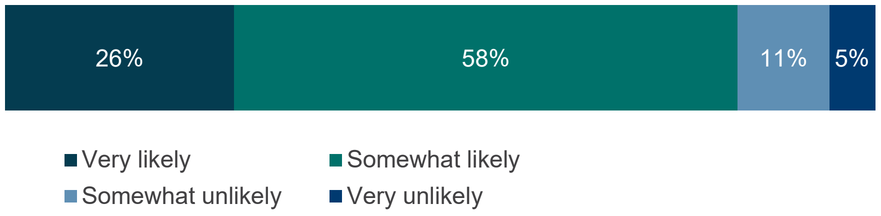
Q1 (Business Survey): How would you describe Pickering's current business environment?



Business Retention and Competitiveness

- Business retention is relatively strong with 84% of respondents indicating they would be very or somewhat likely to stay in Pickering if expanding or relocating.
- Additionally, approximately half of City staff indicated that Pickering's competitiveness was much or somewhat stronger compared to nearby municipalities.

Q2 (Business Survey): If your business was considering expanding or relocating, how likely would you be to stay?



Business Environment and Competitiveness (2/2)

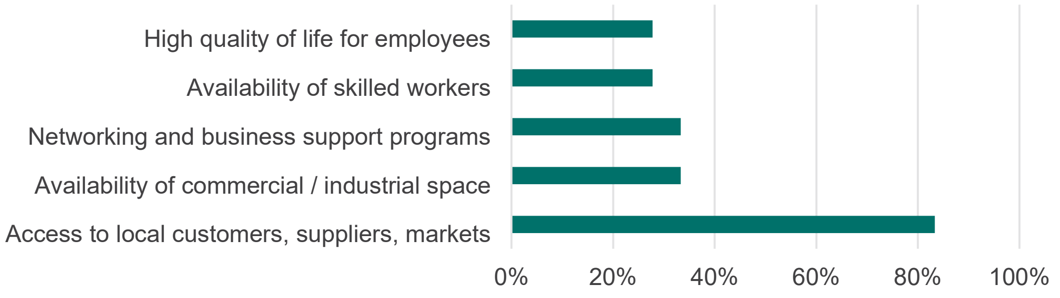
Pickering's strongest competitive advantage is its strategic location and market access, reinforced by regional connectivity and access to customers. Both businesses and staff acknowledge the City's growth momentum as an opportunity, however potential challenges remain with permitting and tax competitiveness to capture this opportunity.

Key takeaways

Business Environment Advantages

- Both staff and businesses predominately cited access to local customers, suppliers or markets as the top advantage (83% of business respondents, 88% of staff), reinforcing Pickering's role as a strategically located hub with connection key markets.
- Availability of commercial and industrial space was also identified by several businesses (33%), tying to key employment nodes such as Seaton and the Innovation Corridor.
- Staff members also frequently cited Pickering's diverse and growing population as a key strength (42%).

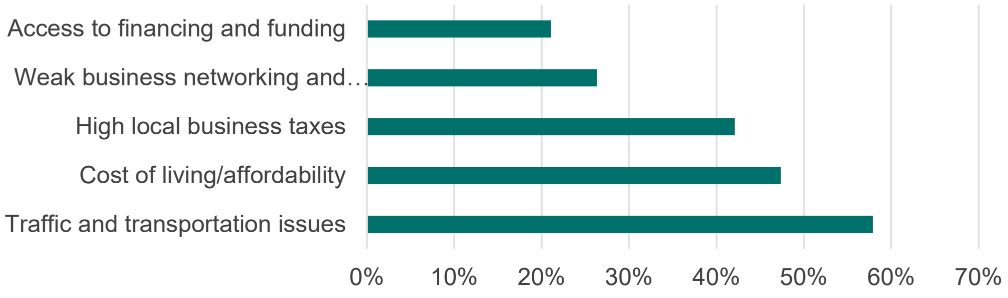
Q3 (Business Survey): What are the main advantages of operating a business in Pickering (Top Responses)



Business Environment Challenges

- Traffic congestion and transportation issues were highly cited by both businesses and staff, however more businesses cited this as an issue (58% of businesses, 46% of staff).
- Cost of living and affordability for employees was the next most frequently cited challenge for businesses, highlighting opportunities to expand housing and service affordability.
- 58% of staff highlighted infrastructure capacity and servicing requirements as a key concern, emphasizing the need to have employment lands ready and serviced to take advantage of major project opportunities.

Q4 (Business Survey): What are the main challenges businesses face in Pickering? (Top Responses)



Workforce and Talent

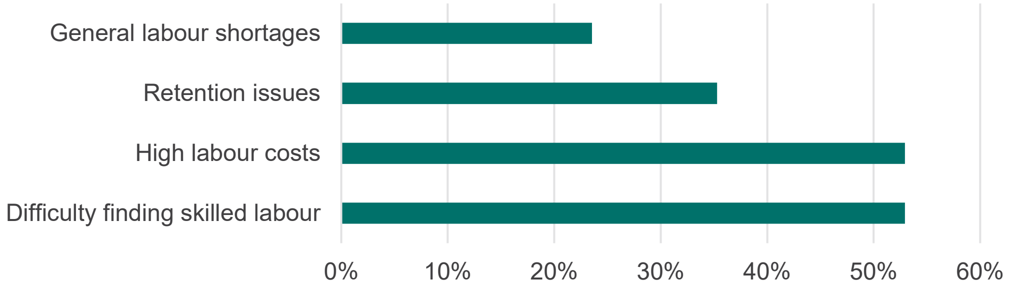
Workforce challenges are centered on skills alignment, labour costs, and retention pressures. Businesses report difficulty finding appropriately skilled workers and managing high labour costs, while staff acknowledge internal capacity constraints that affect service delivery. Quality of life is viewed positively overall, but not universally, indicating it remains both an asset and an area for continued investment to support talent attraction and retention.

Key takeaways

Ease of Finding Appropriate Talent and Skills

- Workforce pressures are primarily related to skills alignment and cost, with 53% of respondents identifying difficulty finding workers with the right skills and 53% citing high labour costs, while 35% report challenges retaining skilled workers.
- Staffing was also reflected structurally as a constraint (33% of respondents indicated staffing/resource constraints in the challenge question), and open-ended comments included workforce development and succession planning themes.

Q5 (Business Survey): What are the top workforce challenges that your business faces? (Top Responses)

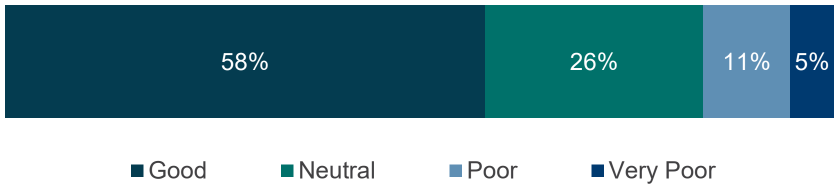


***Note:** Refer to the Appendix for complete results.

Quality of Life

- A majority of respondents (58%) rate Pickering's quality of life as good in supporting business goals, indicating generally positive sentiment, but with room for improvement.
- Qualitative feedback through open-ended questions highlighted transit access as an important enabler for employees to commute to work, which can impact business performance.

Q6 (Business Survey): How would you rate Pickering's quality of life?



Infrastructure, Transportation and Enabling Conditions

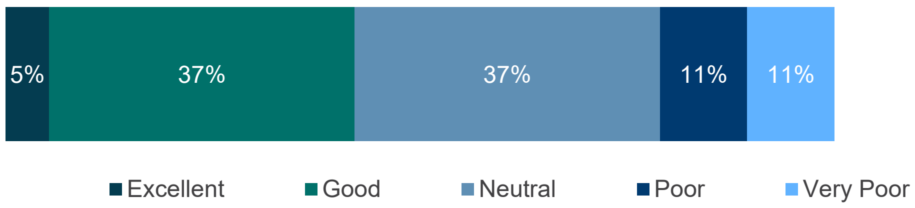
Transportation and servicing infrastructure consistently identified as the most critical enablers and constraints of economic growth in Pickering. Congestion and road network limitations are the dominant concern among businesses, while staff emphasize infrastructure capacity and regional transit advocacy. There is strong alignment that improving transportation systems and unlocking serviced employment lands would have a significant impact on business growth and investment attraction.

Key takeaways

Transportation System and Connectivity Infrastructure

- Perceptions of Pickering's transportation system are mixed. While 42% of respondents rate it as excellent or good, a slightly larger combined share (58%) view it as either neutral (37%) or poor/very poor (21%).
- These results indicate that although transportation is adequate for many businesses, there is meaningful concern around system performance and capacity, reinforcing broader feedback regarding congestion and mobility challenges.

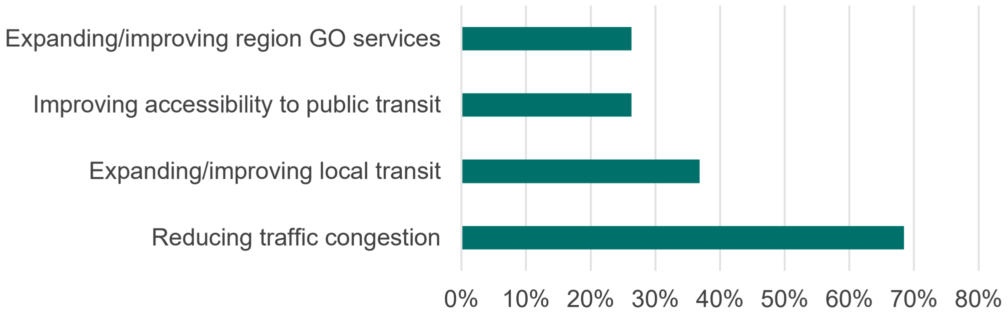
Q7 (Business Survey): How would you rate Pickering's transportation system and connectivity for supporting businesses?



Impactful Transportation Improvements

- The top priorities for businesses are reducing traffic congestion (68%), expanding and improving local transit services (37%), and improving accessibility to public transit (26%), underscoring the importance of both transit coverage and road network efficiency.
- City staff also cited similar servicing/infrastructure and transportation congestion as top constraints with open-ended questions emphasizing the need for regional transit upgrades.

Q8 (Business Survey): What transportation improvements would have the biggest impact on your business? (Top Responses)



City Support and Ease of Doing Business

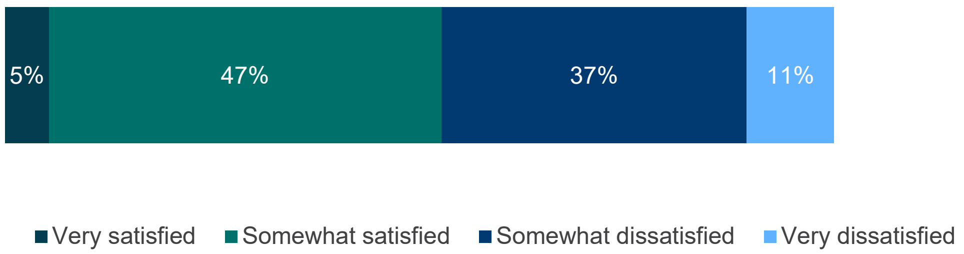
Businesses and staff report broad satisfaction with the City's support, but many still see opportunities to strengthen speed, predictability, coordination, and proactive engagement. Key areas for improvement include increasing the speed of permitting, stronger networking opportunities, and overall process efficiency improvements.

Key takeaways

Satisfaction levels with City Support

- Results indicate mixed sentiment towards city support with 53% of respondents indicating satisfaction with City support and 47% indicating dissatisfaction. This suggests that while many businesses do feel support, there are opportunities to improve the overall opportunity.
- Open-ended questions also highlighted this, with respondents citing the need for faster permitting processes, clearer and more predictable requirements and proactive engagement with the business community.

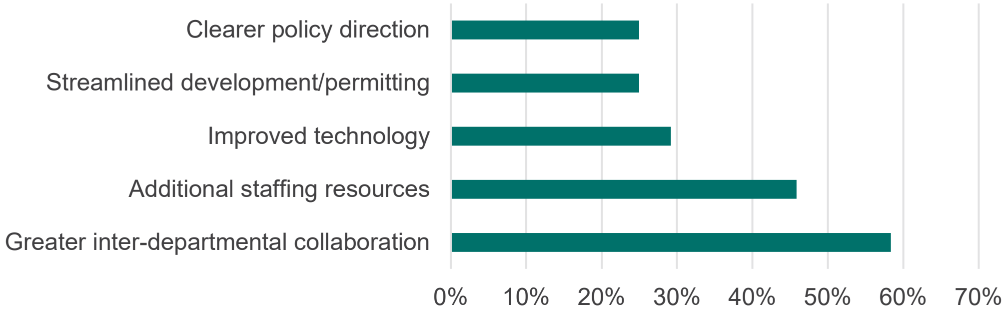
Q9 (Business Survey): How satisfied are you with the City's support for businesses?



Beneficial Support from the City

- Key support initiatives businesses would like to see from the City include networking/mentorship programs (50%), faster and more efficient permit approvals (39%), and promotion of existing industries/businesses (39%).
- Talent recruitment and skills training support along with better access to procurement opportunities were also highlighted by businesses, although not as frequently as the above.
- City staff also cited top improvements that would enhance the ability to support economic development including, greater inter-departmental collaboration (58%), additional staffing resources (46%), and improved technology (29%).

Q10 (Staff Survey): What improvements would most enhance the City's ability to support economic development? (Top Responses)



Growth Drivers and Strategic Priorities (1/2)

Stakeholders view Pickering's future shaped by infrastructure, affordability, technology, and major catalytic projects with key business priorities including transportation, provision of key services, and affordability as critical enablers of long-term growth and competitiveness.

Key takeaways

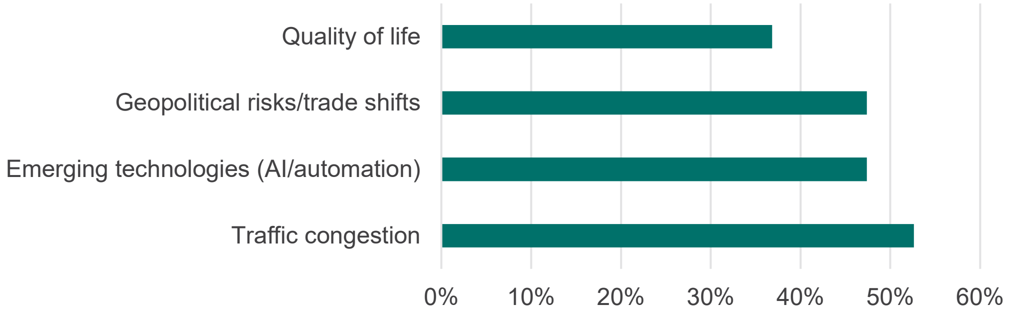
Factors Driving Economic Opportunity and Prosperity

- Improving traffic congestion (53%) and both emerging technologies (47%) and global trade shifts (47%) are viewed as the most influential factors that could shape Pickering's economic future.
- Respondents also highlighted factors tied to quality of life (37%) and labour/skill shortages (26%), signaling the need for a multifaceted, future-ready strategy.

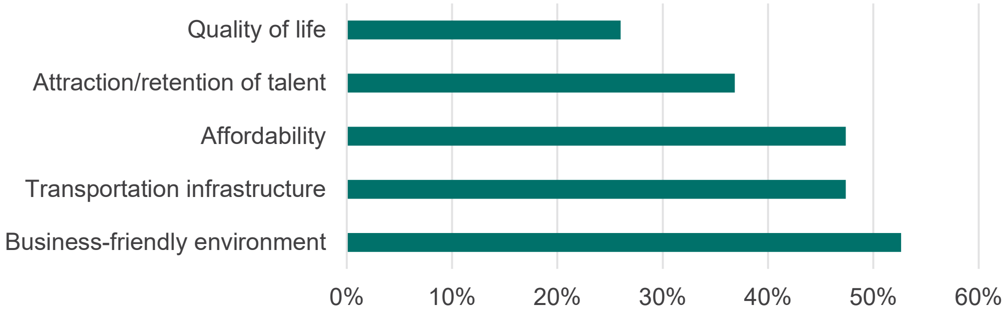
Top Priorities to Position the City for Economic Growth and Prosperity

- The top priorities identified for Pickering's future prosperity include fostering a business-friendly environment (63%) and improving transportation infrastructure (53%), underscoring the need for regulatory clarity and improved services.
- Respondents also emphasized affordability (37%), attracting and retaining talent (32%), and strengthening Pickering's quality of life (26%) as key enablers of long-term growth.

Q11 (Business Survey): Looking ahead, what will be the top factors driving economic opportunities and prosperity in Pickering over the next five years and beyond? (Top Responses)



Q12 (Business Survey): What should Pickering's top priorities be to position the city for future economic growth and prosperity? (Top Responses)



Growth Drivers and Strategic Priorities (2/2)

While there is alignment on the importance of major projects, businesses and staff differ slightly on which projects should be prioritized, highlighting an opportunity to refine and clearly communicate strategic focus areas.

Key takeaways

Areas of Importance for Future Growth

- The City Centre Redevelopment stands out as the top priority for future growth, with 63% of city staff and 37% of businesses ranking it in the top 3.
- The Innovation Corridor rankings were divergent between businesses and staff, with 71% of city staff ranking it in the top 3, and only 16% of businesses.
- Other highly ranked projects included the PNGS refurbishment and Brock Industrial Park, highlighting job and industry growth potential.

Q13 (Business): Rank each area of the city in terms of importance for future growth in Pickering.

Increasing Rank

Project	Avg Ranking (from 1 to 10)
City Centre	4.58
PNGS	4.74
Brock Industrial	4.95
Healthcare Facilities	5.11
Seaton Community	5.21
Community Services Hubs	5.37
Federal Pickering Lands	6.11
Innovation Corridor	6.11
Kingston Road	6.11
Durham Live	6.74

Q14 (City Staff): Rank each area of the city in terms of importance for future growth in Pickering.

Increasing Rank

Project	Avg Ranking (from 1 to 7)
Innovation Corridor	2.10
City Centre	2.60
PNGS	3.50
Brock Industrial	4.20
Seaton Community	4.30
Healthcare Facilities	4.80
Community Services Hubs	5.00

Note: References to the Pickering Federal Lands reflect survey ranking options and stakeholder perceptions only. They do not imply that the lands are confirmed for development or form part of the City's employment land pipeline. Future use remains subject to federal decision-making, consultation, environmental and infrastructure considerations, and Council direction.

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