

Greenbelt Foundation

Economic Impact Assessment
Final Report

June 2026

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Disclaimer

Ernst & Young LLP (“EY”) was engaged by the Greenbelt Foundation to perform a refresh of the 2020 economic impact assessment of the economic activities supported by the Greenbelt’s natural assets. In preparing this document (“Report”), EY relied upon unaudited data and information from the Greenbelt Foundation and publicly available data (collectively, the “Supporting Information”). EY reserves the right to revise any analyses, observations or comments referred to in this Report, if additional Supporting Information becomes available to us subsequent to the release of this Report. EY has assumed the Supporting Information to be accurate, complete and appropriate for the purposes of the Report. EY did not audit or independently verify the accuracy or completeness of the Supporting Information. Accordingly, EY expresses no opinion or other forms of assurance in respect of the Supporting Information and does not accept any responsibility for errors or omissions, or any loss or damage as a result of any persons relying on this Report for any purpose other than that for which it has been prepared.

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1. Executive Summary

1. Executive Summary

1.1 Introduction

Located in the heart of the Greater Golden Horseshoe (“GGH”) in Southern Ontario, the Greenbelt makes up over 2 million acres of protected agricultural lands, forests, wetlands, rivers and coastal waters. The Greenbelt Plan was established in 2005 to safeguard the quality of life in the GGH. It provides an important framework for sustaining regional growth in anticipation of continued population growth and urbanization. The Greenbelt Plan has several objectives:

- ▶ Protection against loss and fragmentation of the agricultural land base and preservation of agriculture as the predominant land use;
- ▶ Protection of natural heritage and water resource systems that sustain human and ecological health and around which major urbanization is organized; and
- ▶ Sustenance of economic and social activities associated with local communities, agriculture, tourism, recreation and resource use.

Purpose of the Report

Ernst & Young LLP (“EY”) was engaged by the Greenbelt Foundation to assess the regional and provincial economic contribution of sectors supported by the Greenbelt. The scope of this report includes the following:

- ▶ Identification of sectors and subsectors that are directly or indirectly supported by the Greenbelt;
- ▶ Estimation of economic contributions of activities in identified sectors to the Greenbelt region and the province of Ontario;
- ▶ Estimation of public revenue contributions of activities in identified sectors and subsectors;
- ▶ Presentation of detailed economic contribution results by sector and region;
- ▶ Assessment of socioeconomic activities and contributions of the Greenbelt; and
- ▶ Identification of future growth opportunities and strategies for Greenbelt economic sectors.

To estimate the economic contributions of key sectors at the regional level, EY carried out detailed geospatial analysis to understand the geographic integration of municipalities with the Greenbelt. Additionally, following detailed analysis of macroeconomic and labour market data for relevant municipalities, EY developed custom regional multipliers to capture the regional contributions of activities in each identified sector.

Sectoral Breakdown of Greenbelt-supported Activity

The results from the analysis are categorized into primary and secondary sector contributions.

Primary Sector

The Greenbelt directly supports economic activity in certain primary sectors in the region. Operations in these sectors are more likely to locate within the Greenbelt, or are sufficiently integrated with the protected lands. These primary sectors consist of:



Agriculture, forestry and fishing



Tourism and hospitality related industries, such as arts, entertainment and recreation, and accommodation and food services

Secondary Sector

Secondary sectors, on the other hand, include industries in the region that may indirectly depend on the Greenbelt for their operations as some of their supply chain activities rely on the primary sectors in the Greenbelt. Secondary sectors considered in this analysis include:



Food manufacturing



Wholesale and retail trade industries



Transportation and warehousing industries





1. Executive Summary

1.2 Summary of Findings - Regional Contributions

Results suggest that on an annual basis, activities in the primary sectors supported by the Greenbelt contribute an estimated total of **\$19.6 billion** in gross output, **\$8.9 billion** in gross domestic product ("GDP"), **\$5.8 billion** in labour income, and sustain approximately **176,883** full-time equivalent jobs ("FTE"s) at direct, indirect and induced levels in the Greenbelt region (Table 1).

Additionally, secondary sectors contribute an estimated total of **\$8.9 billion** in gross output, **\$3.7 billion** in GDP, **\$1.8 billion** in labour income, and support approximately **22,359** FTEs in the region (Table 1).

Table 1: Summary of Regional Contributions from Primary and Secondary Sectors

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Primary Sectors	CURRENT STUDY			
<i>Direct</i>	13,727	6,218	4,345	151,611
<i>Indirect</i>	3,941	1,965	1,101	19,683
<i>Induced</i>	1,914	681	363	5,597
Total	19,582	8,865	5,808	176,883
Secondary Sectors				
<i>Direct</i>	6,917	2,436	1,364	14,882
<i>Indirect</i>	1,464	534	379	5,020
<i>Induced</i>	529	707	99	2,457
Total	8,910	3,676	1,842	22,359





Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Compared to the previous study in 2020, total output **increased by 16%**, while GDP **increased by 12%**, broadly aligning with Ontario's 15% GDP growth from 2020 to 2024.¹ Wages **showed a lower gain of 6%**, while jobs supported in the region overall **grew by 16%**.

The results suggest that across indicators, agriculture, forestry and fishing as well as food manufacturing, trade and transportation showed the strongest gains, while arts and recreation showed mild contractions.

Table 2: Summary of Regional Contributions from Primary and Secondary Sectors

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Primary Sectors	PREVIOUS STUDY			
<i>Direct</i>	12,548	5,761	4,194	126,901
<i>Indirect</i>	3,420	1,655	971	18,363
<i>Induced</i>	1,708	611	328	5,693
Total	17,676	8,026	5,492	147,308
Secondary Sectors				
<i>Direct</i>	5,382	2,206	1,264	16,198
<i>Indirect</i>	1,137	449	374	6,763
<i>Induced</i>	416	519	93	3,031
Total	6,935	3,174	1,731	24,506

Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.





1. Executive Summary

1.2 Summary of Findings - Province-wide Contributions

Results suggest that on an annual basis, activities in the primary sectors supported by the Greenbelt contribute an estimated total of **\$25.5 billion** in gross output, **\$12.4 billion** in GDP, **\$7.6 billion** in labour income, and sustain approximately **214,071** FTEs at direct, indirect and induced levels in the Province of Ontario (Table 3).

Secondary sectors contribute an estimated total of **\$11.7 billion** in gross output, **\$4.6 billion** in GDP, **\$2.6 billion** in labour income, and support approximately **33,142** FTEs in the Province of Ontario (Table 3).

Table 3: Summary of Province-wide Contributions from Primary and Secondary Sectors





Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Primary Sectors	CURRENT STUDY			
<i>Direct</i>	13,727	6,218	4,345	151,611
<i>Indirect</i>	7,320	3,559	2,020	37,848
<i>Induced</i>	4,504	2,624	1,209	24,611
Total	25,551	12,402	7,573	214,071
Secondary Sectors				
<i>Direct</i>	6,917	2,436	1,364	14,882
<i>Indirect</i>	3,244	1,318	833	11,156
<i>Induced</i>	1,503	878	405	7,104
Total	11,664	4,631	2,602	33,142

Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.
Sources: Statistics Canada and EY analysis.

Similar to regional contributions, agriculture, forestry and fishing as well as food manufacturing, trade and transportation grew at the greatest rate, while arts and recreation experienced slight decline.

The growth in province-wide economic contributions align with changes observed in regional economic contributions. Total output **increased by 15%**, while GDP **increased by 12%**, broadly aligning with Ontario's 15% GDP growth from 2020 to 2024.² Wages **showed a lower gain of 6%**, while jobs supported in the province overall **grew by 17%**.

Table 4: Summary of Province-wide Contributions from Primary and Secondary Sectors

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Primary Sectors	PREVIOUS STUDY			
<i>Direct</i>	12,548	5,761	4,194	126,901
<i>Indirect</i>	6,482	3,166	1,878	30,755
<i>Induced</i>	4,086	2,408	1,136	20,055
Total	23,116	11,335	7,208	177,711
Secondary Sectors				
<i>Direct</i>	5,382	2,206	1,264	16,198
<i>Indirect</i>	2,480	920	782	11,252
<i>Induced</i>	1,246	736	376	6,850
Total	9,108	3,862	2,422	34,300

Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.
Sources: Statistics Canada and EY analysis.

1. Executive Summary

1.3 Summary of Social and Environmental Contributions

The Greenbelt's natural assets and multiple initiatives deliver social and environmental value by safeguarding ecosystems, supporting local communities and jobs, and strengthening long-term climate and landscape resilience. It also provides versatile climate protection to minimize economic damage associated with extreme weather events.

Social Contributions



Food Security and Agricultural Resilience

Policy protections of the Greenbelt prevent ongoing farmland loss while preserving highly productive land, enabling the production of a notable share of fruit and vegetables in Ontario. The farms in the Greenbelt also increase access to local food with 23% of farmers reporting direct sale to consumers.



Community Well-being and Quality of Life

The Greenbelt supports over 165,000 direct local jobs and protects key natural systems. Furthermore, it enhances the quality of life with increased access to nature and outdoor activities for residents.



Investment Attraction and Competitiveness

Its ecosystems offer conservation and restoration infrastructure opportunities for investable nature-based capital projects to attract investors, and support regional economic prosperity while enhancing environmental resilience to support a growing population.



Tourism and Lived Experience

Its tourism and recreation networks provide a near-urban network of trails and parks, enabling quality visitor experiences and meaningful community building.

Environmental Contributions



Climate Change Mitigation and Adaptation

It provides natural mitigation services through carbon sequestration* to support Ontario's greenhouse gas reduction. As climate risks intensify, the Greenbelt also delivers adaptation benefits such as flood management and temperature regulation, helping to prevent climate-related damages.



Ecological Backbone

As pressure on hydrological systems gradually rises, the Greenbelt helps to protect critical hydrological systems and drinking-water sources such as the Oak Ridges Moraine, and strengthens watershed performance through restoration and natural-asset management.



Soil Health and Landscape Resilience

It helps to protect an irreplaceable, high-productivity land base and favourable microclimates by limiting fragmentation and incompatible development, and, as soil degradation risks increase, helps to maintain soil health to sustain long-term agricultural yields.



Biodiversity Protection

The Greenbelt safeguards connected habitats that support species movement, genetic diversity, and long-term ecological resilience. It also complements protection with targeted conservation to sustain at-risk ecosystems.

* Carbon sequestration refers to process of capturing carbon dioxide from the atmosphere to prevent it from contributing to climate change.

1. Executive Summary

1.4 Value Proposition

Below is an overview of the Greenbelt’s value proposition, informed by research and analysis of its unique strengths and market position.

Value Proposition

Foundation for Regional Economic Prosperity

The Greenbelt directly and indirectly supports economic activity across agriculture, agri-food processing, tourism, recreation, and related supply chains.

Long-term Certainty

The legislated, permanent protection framework provides a predictable land-use environment, thereby reducing development risk and supporting confidence among communities, governments, and private stakeholders.

A Strategic Food and Agricultural Asset

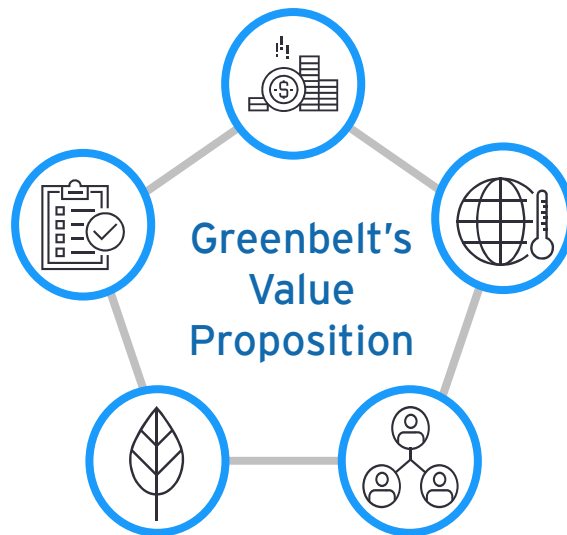
With a sizeable agricultural land base and two of Ontario’s specialty crop areas, the Greenbelt is central to agricultural activity.

Critical Infrastructure for Climate Resilience

The Greenbelt functions as critical natural infrastructure, supporting crop production, climate resilience, and sustainability goals.

Platform for Collaboration and Value Creation

The Greenbelt provides a living landscape for partnerships with leading universities and research bodies to drive science-based innovation in areas such as soil health and biodiversity.



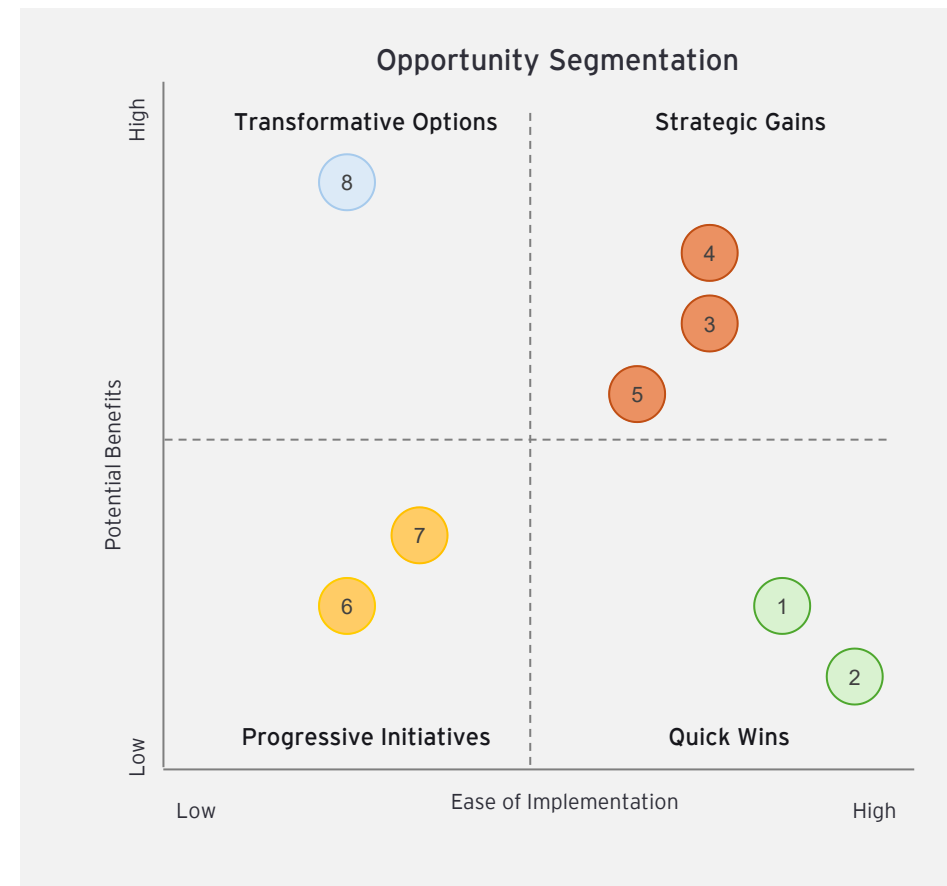
1. Executive Summary

1.5 Opportunity Landscape

EY identified and evaluated opportunities based on ease of implementation and potential benefits. This prioritization can assist stakeholders in the Greenbelt region in identifying areas that can deliver near-term progress while also advancing longer-term initiatives.

ID	Opportunity
1	Process Local and Specialty Foods: Strengthen regional food processing capacity for minimally processed local and sustainable food products.
2	Develop Curated Farm Experiences: Create bookable, premium farm-based activities for immersive local food and agri-tourism offerings.
3	Expand Controlled-Environment Agriculture (“CEA”): Diversify and scale production of high-value crops through greenhouse and controlled-environment technologies.
4	Expand Eco-tourism Experiences: Provide diverse nature-oriented visitor experiences such as habitat walks, wildlife viewings, etc.
5	Integrate Private Lands into Trail Networks: Unlock new recreation corridors by partnering with landowners to connect private lands to larger trail and hike routes.
6	Strengthen On-Farm Natural Infrastructure: Strengthen on-farm natural infrastructure to enhance environmental resilience, support farm productivity, and attract private capital to invest in nature-based solutions.
7	Leverage Local Supply Chains: Increase the production of crops with existing local supply chains such as apples, strawberries and eggplants to generate farm-gate revenues and reduce dependency on imports.
8	Add Parkland and Recreational Capacity: Unlock new recreation corridors through new partnership models, incentives and governance to connect private lands to larger trail and hike routes.

- **Quick Wins:** Opportunities that can be implemented quickly to generate near-term progress.
- **Strategic Gains:** Opportunities that can provide high potential benefits with strategic capacity enhancements.
- **Progressive Initiatives:** Opportunities that can provide incremental benefits as markets evolve and develop.
- **Transformative Options:** Opportunities that offer long-term impact but require greater effort and investment to implement.



1. Executive Summary

1.6 Strategic Direction

Informed by best-practice research and EY's sector expertise, EY developed strategies and actions that can help strengthen stakeholder efforts to pursue these opportunities effectively in the Greenbelt region.



Coordinate Research and Innovation Partnerships

Coordinate research and innovation efforts to solve on-ground challenges and scale various opportunities for the Greenbelt.

Key Actions: *Cross-Municipal Coordination, Applied Research Partnerships*



Strengthen Recreation and Nature-based Experience Offerings

Strengthen visibility as Canada's leading well-connected outdoor recreation hub.

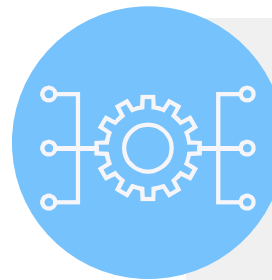
Key Actions: *Greenbelt Experience Network, Visitor Infrastructure, Unified Brand and Digital Platform*



Position Greenbelt for Natural Capital Investment

Position the Greenbelt to channel private investment into priority corridors and project-ready restoration and conservation improvements.

Key Actions: *Resilience Zones and Habitat Corridors, Project Pipeline, Investment-Ready Pathways*



Develop Local Food and Market Integration Program

Enable Greenbelt producers to reliably access regional institutional, retail, and commercial markets through an integrated program.

Key Actions: *Short Supply Chain Hubs, Regional Buyer Partnerships, Local Food Branding and Visibility*

A person is seen from behind, carrying a large, green tree sapling on their back. They are wearing a white tarp or bag over their shoulders and a red bag. The person is standing in a field of tall grass and small trees. The background shows a clear blue sky.

2. Overview of Greenbelt's Economy

2.1. Overview of Ontario's Greenbelt

2.2. Greenbelt's Role in the Regional Economy

2. Overview of Greenbelt's Economy

2.1 Overview of Ontario's Greenbelt

Located in the heart of the Greater Golden Horseshoe ("GGH") region in Southern Ontario, the Greenbelt makes up over 2 million acres of protected agricultural lands, forests, wetlands, rivers, and coastal waters. The Greenbelt Plan was established in 2005 to safeguard the quality of life in the GGH in anticipation of continued population growth and urbanization.

Ontario recently strengthened protection of the Greenbelt through the Greenbelt Statute Law Amendment Act, 2023. The Act strengthened long-term protections by requiring that any future boundary changes can only occur through legislation.³

The Greenbelt Plan has several objectives:

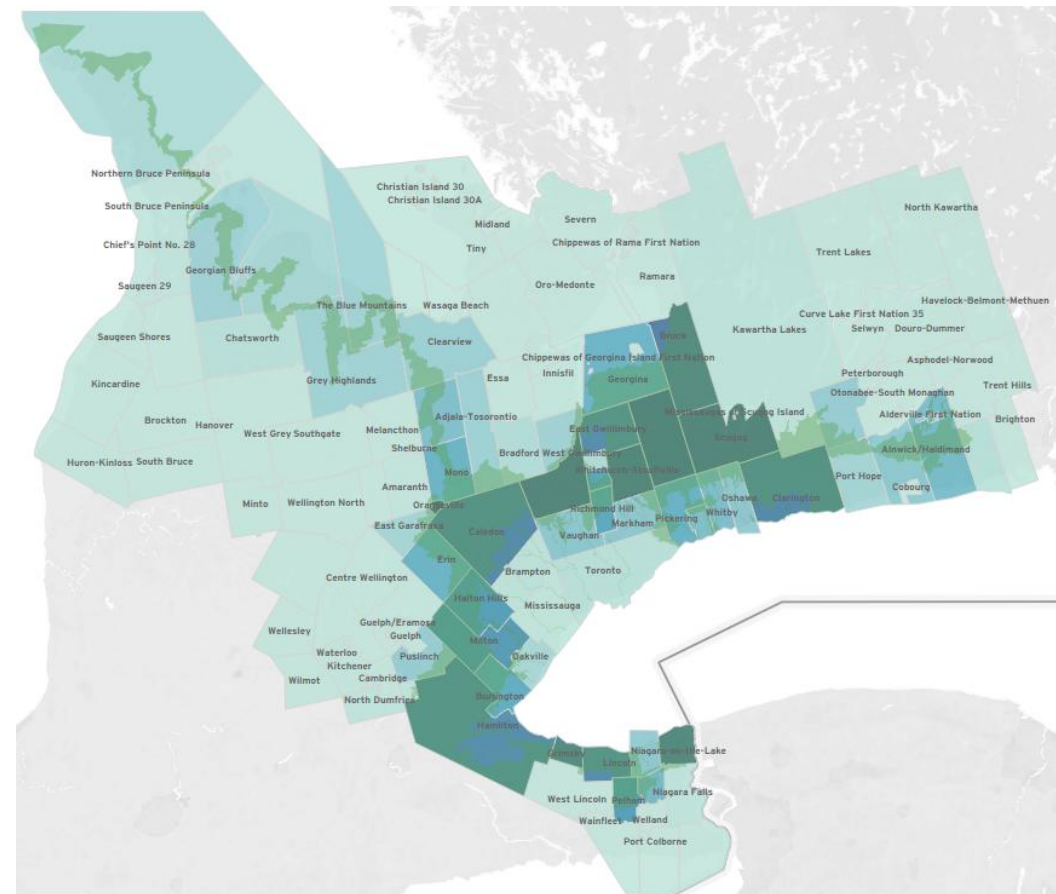
- ▶ Protection against loss and fragmentation of the agricultural land base and preservation of agriculture as the predominant land use;
- ▶ Protection of natural heritage and water resource systems that sustain human and ecological health and around which major urbanization is organized; and
- ▶ Sustenance of economic and social activities associated with local communities, agriculture, tourism, recreation and resource use.⁴

The Greenbelt's natural capital sustains complex ecological systems while supporting economic activity across multiple sectors. Its rich natural resources underpin key industries such as agriculture, forestry, tourism, recreation, accommodation, and food services, creating opportunities for local businesses and employment. Agriculture and food remain central, supported by abundant crop and livestock production and two of Ontario's specialty crop areas, the Niagara Peninsula Tender Fruit and Grape Area and the Holland Marsh, while extensive trail networks and natural landscapes also drive tourism and recreation revenues through activities such as hiking, cycling and skiing.

Key sectors in the Greenbelt also benefit from their proximity to major urban centres in the GGH. Farms that enjoy the advantage of the Greenbelt's location include sod farming, tree nursery operations and Christmas tree production. Additionally, certain farm types enjoy a natural advantage owing to the Greenbelt's soil and climate. These include vegetable production in Holland Marsh and tender fruit, grape and wine production in the Niagara region.⁵

The Greenbelt overlaps with several municipalities or census subdivisions in the region. **Figure 1** below displays a heat map of municipalities in the GGH region and their respective degree of overlap with the Greenbelt. EY analyzed the degree of geographic overlap with municipal boundaries to serve as an input to this analysis.

Figure 1: Overview of Greenbelt Overlap with Census Subdivisions



Sources: Ontario GeoHub, Statistics Canada, EY analysis.

2. Overview of Greenbelt's Economy

2.2. Greenbelt's Role in the Regional Economy*

The GGH is a vibrant and fast-growing region in Canada. The historical significance of the GGH economy was associated with its location and proximity to United States markets, and more recently, the competitive advantages in this region, including a diverse and skilled workforce and its knowledge-based economy. The regional economy of the GGH is projected to grow to support 14.8 million people and 7 million jobs by 2051, contributing largely to Canada's economy.⁶ In addition, the GGH is home to various natural resources, including the Greenbelt protected lands. These regional natural assets are an anchor for resource-dependent industries and provide a landscape for tourism and recreational activities.

The Greenbelt's importance stems from its sustenance of key ecological systems in the GGH and in Ontario, contributions made by the protected region towards human and ecological health, and economic activity supported by it in agriculture and tourism-related industries. The Greenbelt's ecological assets create recreational value for Ontarians and provide improvements in air quality. Wetlands in the Greenbelt provide protection to human property from flood damage, the value of which has been estimated at **\$224 million** a year. Ecological services also include sequestration of greenhouse gas and carbon storage** in the Greenbelt's forests, wetlands and farms, with the carbon sequestration valued at **\$52 million** per year.⁷

Contributions to the Agriculture Economy

As noted above, the Greenbelt is a key contributor to the region's agriculture economy. While the Greenbelt accounts for 6% of Ontario's farmland, it contains approximately 9% of Ontario's farms.⁸ Greenbelt farms are highly productive, generating nearly 68% higher farm cash receipts per acre than farms in the rest of Ontario. Home to nearly 53% of Ontario's fruit acreage, including more than 80% of Ontario's acreage in peaches, plums, prunes, apricots and grapes, the Greenbelt is a major supplier of the province's fruits. Most of these fruit crops are grown in the Niagara Peninsula, one of two specialty crop areas. The Greenbelt accounts for 11% of Ontario's vegetable acreage, grown in the Holland Marsh specialty crop area and other prime agricultural lands.⁹

While specializing in horticulture activities, the Greenbelt also contributes to Ontario's animal agriculture and livestock production, with 8% of broiler chicken production, 8% of sheep and lambs, and 6% of beef cows.¹⁰ The Greenbelt supports a vibrant value-added agriculture and agri-tourism economy, with numerous farmers' markets, on-farm markets, pick-your-own operations, as well as breweries, wineries, and cideries.

Contributions to Other Sectors

In addition to agriculture and related activities, the Greenbelt provides abundant natural resources for tourism and recreational activities. The Greenbelt also includes cycling along the protected countryside on the 475 kilometre-long Greenbelt Route ranging from Northumberland to Niagara, multiple regional trails, long-distance trails including the Bruce Trail, Trans Canada Trail, and Oak Ridges Moraine Trail, and skiing in the Blue Mountains, among others.¹¹ These activities contribute to the regional and provincial economy by generating jobs, income and business opportunities.

Having access to a large consumer base in Ontario's major metropolitan centres strengthens business activity in the Greenbelt, as both consumers and producers rely on the region's agricultural output for their own needs. These locational advantages are reflected in the Greenbelt's significant share of provincial agricultural activity. For example, 17% of Ontario's ponies and horses reside in the Greenbelt, and 46% of the province's nursery crop acreage is located there. Farmers in the Greenbelt are also more likely to sell directly to local consumers (23%) than the provincial average (16%).¹²

* Figures and analyses in this section are sourced from the Greenbelt and external sources.

** Sequestration refers to the rate at which carbon is captured; and carbon storage is a cumulative measure of all previous sequestration.

An aerial photograph of a rural landscape featuring various agricultural fields. The fields are divided into sections, some showing rows of crops and others appearing as bare earth or different stages of growth. A prominent blue diagonal overlay covers the left side of the image, containing white text. The overall scene is captured from a high angle, showing the geometric patterns of the farmland.

3. Methodology

3.1 Geospatial Analysis

3.2 Economic Activity in the Greenbelt

3.3 Economic Impact Assessment

3. Methodology

3.1 Geospatial Analysis

The Greenbelt spans across several census divisions in Ontario's GGH, and covers nearly two million acres of protected land and coastal wetlands in the region. As the Greenbelt boundaries do not align with Statistics Canada's regional boundaries, EY used Geographic Information System ("GIS") tools to conduct detailed geospatial analysis of areas that intersect with Ontario's Greenbelt to better understand the regional economic impact.

Greenbelt boundary files are obtained from Ontario GeoHub, whereas the latest Intercensal Census Subdivision Digital Boundary files for 2025 are obtained from Statistics Canada. GIS tools were used to overlay Greenbelt boundaries in the GGH region to identify census divisions and subdivisions that overlap with the Greenbelt.

A list of census divisions which intersect with Ontario's Greenbelt is provided below:

- ▶ Bruce County
- ▶ Dufferin County
- ▶ Durham Region
- ▶ Grey County
- ▶ Halton Region
- ▶ Hamilton City
- ▶ Kawartha Lakes
- ▶ Niagara Region
- ▶ Northumberland County
- ▶ Peel Region
- ▶ Peterborough
- ▶ Simcoe County
- ▶ Toronto
- ▶ Waterloo Region
- ▶ Wellington County
- ▶ York Region

Spatial Overlay Analysis

Two levels of geography were considered for this analysis: census divisions ("CD"s), and census subdivisions ("CSD"s). CSDs define municipalities and municipal equivalent areas. This is the most granular level at which economic data was available for this analysis. CDs are defined as a group of neighbouring municipalities joined together for regional planning and service management purposes.

As Greenbelt protected areas do not constitute a large proportion of land mass in several CDs in the GGH, a more granular geospatial analysis is conducted at the CSD level to identify smaller geographic areas where economic activity may be directly or indirectly supported by Ontario's Greenbelt.

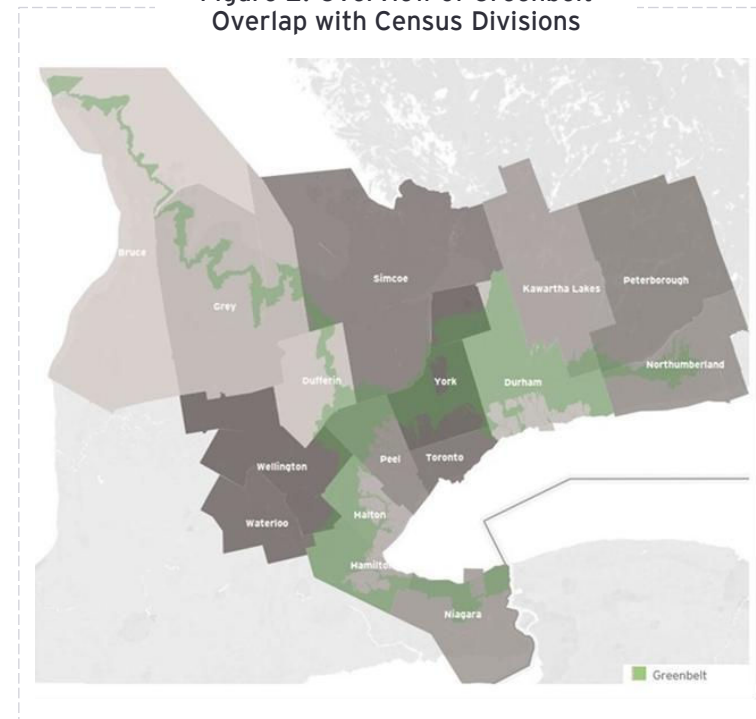
An analysis of regional area coverage was performed to understand the extent of overlap between the Greenbelt boundaries and CSD boundaries. Since not all CSDs in the region have a significant overlap with the Greenbelt, the analysis focuses on regions where economic activity is sufficiently integrated with the Greenbelt.

For the purposes of this analysis, a minimum of 20% area cover is used as qualifying criteria to include a CSD in the "Greenbelt economy". This threshold also helps maintain consistency with the previous economic impact study conducted. Certain CSDs are included in this list which may not meet the 20% cut-off, as industries in these subdivisions, such as tourism and agriculture, benefit from their proximity to these environmentally protected lands.

A list of CSDs used to represent the "Greenbelt economy" is provided in **Table A1** in **Appendix A.1**. Economic activity by industry is quantified for each selected CSD, as discussed further in **Section 3.2**.

Sources: EY Analysis

Figure 2: Overview of Greenbelt Overlap with Census Divisions



3. Methodology

3.2 Economic Activity in the Greenbelt

As displayed in **Figure 2** (previous page), the Greenbelt overlaps with several CDs in the GGH region. The economy of the GGH supports activities along all stages of the food systems supply chain, including agricultural food production, food processing and manufacturing, wholesale and retail trade, and food service businesses. Of these, the Greenbelt accounts for a significant proportion of economic activity in certain sectors. For instance, 53% of Ontario's fruit acreage and nearly 11% of Ontario's vegetable acreage are located within the Greenbelt.¹³

A list of industries was developed for this analysis based on previous economic impact assessments. The detailed list of industries whose operations are supported by the Greenbelt's natural assets is provided in **Table A2** in **Appendix A.2**. Economic activity by North American Industry Classification System ("NAICS") codes are mapped to sectors in the Input-Output ("I-O") framework, and economic impact results are categorized into a set of summary sectors outlined in **Table 5** below.

Table 5: Economic Impact Sectors

Summary Sector	Sectors Included
Agriculture, forestry and fishing	Crop and animal production; forestry and logging; fishing, hunting and trapping; support activities for agriculture and forestry
Manufacturing, trade and transportation	Food manufacturing; wholesale trade; retail trade; transportation and warehousing
Arts, entertainment and recreation	Travel arrangement and reservation services
Accommodation and food services	Accommodation and food services

Sources: Statistics Canada and EY analysis.

Of the summary sectors displayed in **Table 5**, agriculture, forestry and fishing; arts, entertainment and recreation; and accommodation and food services are defined as primary sectors. The Greenbelt is expected to directly support economic activity in these sectors by providing necessary inputs for the sectors' operations. These may include (but are not limited to) farmers utilizing land in the Greenbelt for agriculture, and tourism operators using the Greenbelt's natural assets for guided tours and other tourism-related activities.

Additionally, food manufacturing, trade, and transportation are categorized as secondary sectors for the purposes of this analysis. These sectors include industries in the region that may indirectly depend on the Greenbelt for their operations. Secondary sectors are expected to source their raw materials and other inputs from primary sector outputs, including activities such as food manufacturers sourcing the Greenbelt's agricultural products for their operations, and other related activities.

Please note that this study assesses the regional and provincial economic contribution of sectors supported by the Greenbelt. Potential contributions from alternative uses of Greenbelt land and its natural assets are outside the scope of this study and would require further analysis.

Direct Spending by Industry

Since data related to direct output by industry is not available at detailed geographies such as CSDs, EY employs a widely used technique to estimate regional economic activity. This involves the use of provincial labour productivity by industry as well as provincial and regional labour market information. An important consideration in this methodology is that the provincial economic structure for each sector is assumed to be representative of those sectors at sub-provincial regions and economies, which is suitable for the GGH as it generates approximately two-thirds of Ontario's total GDP.¹⁴

Ontario's GDP by industry and employment data from the Statistics Canada 2021 Census was used to estimate GDP by industry for each CSD in focus. Statistics Canada's Input-Output ratios were then used to estimate the associated direct spending by industry for each region. The direct spending is an estimate of the operational and capital spending of sectors supported by the Greenbelt in each CSD, and serves as the key input in the regional economic impact estimation.

3. Methodology

3.3 Economic Impact Assessment

To model the economic impacts from activities supported by the Greenbelt’s natural assets, EY utilized its proprietary economic model to assess these effects. The model incorporated inputs from Statistics Canada and the Government of Ontario and is based on the principles of the **input-output (“I-O”) model**. This model captures economic impacts through three distinct channels: **direct**, **indirect**, and **induced** impacts. These impacts, both individually and collectively, illustrate how these economic activities ripple throughout the regional economy, as shown in **Figure 3**.

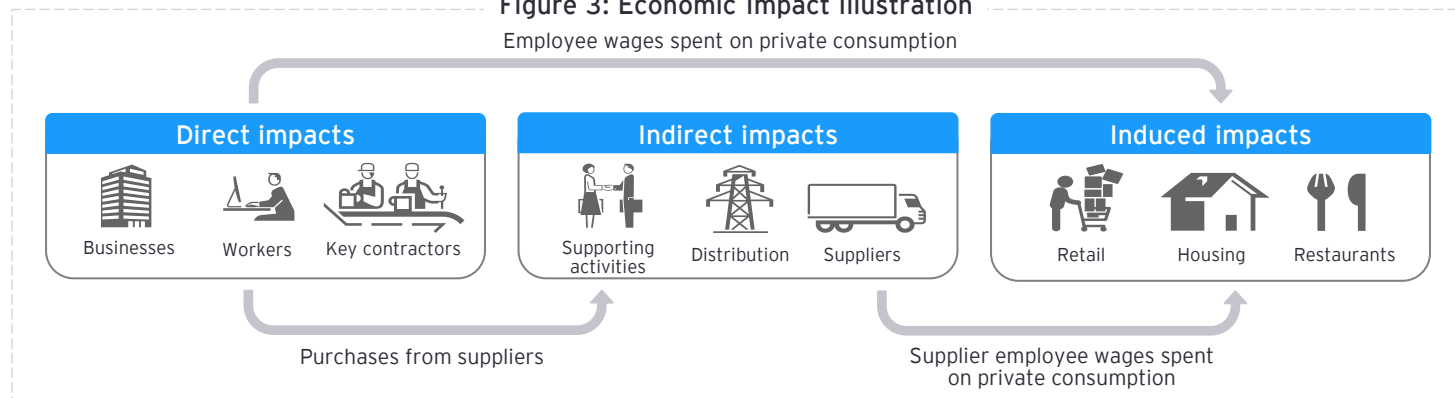
The key economic indicators analyzed include **Gross Output, GDP, Wages, Jobs (FTEs), and Taxes**, as described in **Figure 4**.

To estimate the total economic impacts supported by the Greenbelt’s natural assets, Statistics Canada’s 2022 economic multipliers were used, which capture interdependencies across industries and indicate the total economic impacts for a given level of spending. These Input-Output tables are based on a widely accepted methodology used by both public and private sector organizations.

To develop regional economic multipliers for the CDs in and around the Greenbelt, data on industry concentrations, employment, and other microeconomic factors are incorporated to reflect each CD’s local economic structure. This approach produces regionalized multipliers that more accurately represent how Greenbelt-supported activities contribute to both the regional and provincial economies.

In order to estimate the regional impact of economic activities supported by the Greenbelt’s natural assets, custom regional multipliers were developed for each CD and applied to all CDs in consideration for this analysis.

Figure 3: Economic Impact Illustration



Sources: EY Analysis. For further details, please see [Appendix A.5. Input-Output Model: Assumptions and Limitations](#).

Figure 4: Economic Impact Indicators

	Gross Output	Output impacts represent the total economic value of new goods delivered, and services rendered within a particular area.
	GDP	GDP impacts represent value added generated through stimulated economic activity from all final goods and services produced in a specific region.
	Wages/Salaries	Wages and salaries sustained as a result of economic activity from the activities supported by the Greenbelt’s natural assets. (These form a part of GDP impacts)
	Person-years FTE	Jobs created and supported across the region. FTE is measured in person-years. One FTE is equivalent to one worker employed full-time based on a standard 40-hour work week.
	Taxes	Municipal/local, provincial, and federal tax (taxes on products and production) collections from the activities supported by the Greenbelt’s natural assets.

An aerial photograph of a vast, lush green agricultural field, likely a rice paddy, with distinct rows of crops. A narrow road or path runs through the center of the field. In the lower portion of the image, a truck is visible on the road, carrying a large load of goods, possibly agricultural products. The overall scene is vibrant and depicts a rural agricultural setting.

4. Results - Economic Impact Assessment

4.1 Economic Contributions to the Region

4.2 Province-wide Contributions

4.3 Contributions to Government Revenue





4. Results - Economic Impact Assessment

4.1 Economic Contributions to the Region

Summary of Economic Contribution Results

By using custom regional multipliers, the economic contributions supported by the Greenbelt have been estimated for all CSDs in consideration. The direct, indirect, and induced economic contributions are shown in **Table 6**.

On an annual basis, economic activities supported by the Greenbelt contribute to the regional economy an estimated total of:

	 Output	 GDP	 Wages	 FTEs
Current Study (2026)	\$28.5B	\$12.5B	\$7.7B	199,243
Previous Study (2020)	\$24.6B	\$11.2B	\$7.2B	171,814





Figures for wages, GDP and output are in millions and reported in constant 2022 \$.

Comparison to Previous Study

Across indicators, agriculture, forestry and fishing as well as food manufacturing, trade and transportation show the strongest gains, while arts and recreation shows mild contractions. These changes are likely driven by the impact of COVID-19 on service industries.

- ▶ **Output:** Total output **increased by 16%**. Agriculture, forestry and fishing output saw the largest increase of 30%, followed by food manufacturing, trade and transportation at 28%. This growth indicates stronger activity in resource-based and logistics-intensive sectors, driven by productivity increases and population growth in the province.¹⁵
- ▶ **GDP:** GDP **increased by 12%**, broadly aligning with Ontario's 15% growth (2020-2024). Agriculture, forestry and fishing saw the largest rise (31%), followed by manufacturing, trade and transportation (16%) and accommodation and food services (12%).¹⁶
- ▶ **Wages:** Wage impacts **increased by 6%**. Agriculture, forestry and fishing rose 23%, while arts, entertainment and recreation declined 16%. This wage decline is associated with slow post-COVID-19 recovery, resulting in reduced work hours and employment.¹⁷
- ▶ **Employment (FTEs):** Employment **increased by 16%**, consistent with output. Agriculture, forestry and fishing (43%) and accommodation and food services (26%) increased, while arts, entertainment and recreation (-7%) and manufacturing, trade and transportation (-9%) declined. These declines reflect weaker labour conditions in agri-food manufacturing. These declines are consistent with national trends. Canada-wide food-manufacturing payroll employees fell 4.7% in 2024, and post-COVID-19 recovery has been slow in arts, entertainment and recreation.^{18,19}

Table 6: Regional Impacts from Primary and Secondary Sectors

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Regional Impacts from Primary Sectors				
Agriculture, Forestry & Fishing				
<i>Direct</i>	2,475	1,088	452	14,234
<i>Indirect & Induced</i>	838	348	170	3,649
Total	3,313	1,436	622	17,883
Arts, Entertainment & Recreation				
<i>Direct</i>	2,938	1,397	849	22,226
<i>Indirect & Induced</i>	1,207	624	402	8,001
Total	4,145	2,021	1,250	30,227
Accommodation & Food Services				
<i>Direct</i>	8,315	3,733	3,043	115,144
<i>Indirect & Induced</i>	3,810	1,675	892	13,630
Total	12,124	5,408	3,935	128,774
Primary Sector Total				
<i>Direct</i>	13,727	6,218	4,344	151,603
<i>Indirect & Induced</i>	5,855	2,646	1,464	25,280
Total	19,582	8,865	5,808	176,883
Regional Impacts from Secondary Sectors				
Food Manufacturing, Trade & Transportation				
<i>Direct</i>	6,917	2,436	1,364	14,882
<i>Indirect & Induced</i>	1,993	1,241	478	7,477
Total	8,910	3,676	1,842	22,359
Current Study Total	28,492	12,541	7,651	199,243
Previous Study Total	24,611	11,200	7,224	171,814

Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

4. Results - Economic Impact Assessment

4.1 Economic Contributions to the Region





Regional Contributions from Primary Sectors

For CSDs with 50% or more Greenbelt overlap, all direct primary-sector spending was fully included, while secondary-sector activity was scaled based on the degree of overlap. For CSDs with 20-50% overlap, only primary-sector spending was included, as these sectors are more directly tied to Greenbelt-driven supply-chain benefits.

Aggregate regional contributions from the primary sector in each CD in the current study and the previous study are provided in **Table 7** and **Table 8**, respectively.

Primary-sector output and GDP increased by about 10% and 11%, with modest wage and FTE growth. Agriculture-, forestry- and agri-food-driven CDs, such as Bruce County, Wellington, and Northumberland, show stronger gains relative to more urban CDs such as Dufferin, which recorded a decline.





Table 7: Total Regional Contributions from Primary Sectors

Economic Impact				
	Output (\$ million)	GDP (\$ million)	Wages (\$ million)	FTEs (Person-Years)
<i>Census Division</i>	<i>CURRENT STUDY</i>			
Bruce	79	35	23	718
Dufferin	294	128	84	2,691
Durham	4,365	2,006	1,318	39,077
Grey	175	80	44	1,376
Halton	2,042	921	614	18,483
Hamilton	3,473	1,536	1,019	31,912
Niagara	2,432	1,107	662	21,263
Northumberland	149	64	38	1,194
Peel	413	186	120	3,454
Peterborough	54	24	14	407
Simcoe	155	67	41	1,283
Wellington	220	96	56	1,668
York	5,731	2,615	1,775	53,358
Greenbelt Total	19,582	8,865	5,808	176,883

Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$.
Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Table 8: Total Regional Contributions from Primary Sectors

Economic Impact				
	Output (\$ million)	GDP (\$ million)	Wages (\$ million)	FTEs (Person-Years)
<i>Census Division</i>	<i>PREVIOUS STUDY</i>			
Bruce	39	18	12	329
Dufferin	314	137	94	2,614
Durham	3,815	1,746	1,202	31,397
Grey	157	71	43	1,224
Halton	1,867	849	593	15,789
Hamilton	3,073	1,357	937	25,744
Niagara	2,334	1,048	663	18,763
Northumberland	122	55	34	956
Peel	410	186	126	3,235
Peterborough	48	21	14	365
Simcoe	147	67	40	1,108
Wellington	173	82	47	1,264
York	5,176	2,390	1,687	44,521
Greenbelt Total	17,676	8,026	5,492	147,308

Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$.
Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

4. Results - Economic Impact Assessment

4.1 Economic Contributions to the Region

Regional Contributions from Secondary Sectors





For CSDs with 50% or greater area overlap with the Greenbelt, all direct spending in primary sectors under study was included in the contribution assessment. For secondary sectors, the area overlap was used to inform the extent of economic activity that was included in the analysis.

Additionally, for CSDs with greater than 20% and less than 50% area overlap with the Greenbelt, direct spending was limited to the primary sectors. These sectors are more likely to directly benefit from their proximity to the Greenbelt driven by supply chain linkages.

Aggregate regional contributions from secondary sectors in each CD in the current study and the previous study are provided in **Table 9** and **Table 10**, respectively.

Secondary-sector output rose 28%, GDP 16%, and wages 6%, while FTEs declined 9%. Growth is concentrated in CDs anchored by manufacturing, trade and transportation, such as Peel, Hamilton, Durham and Dufferin, while CDs with smaller industrial bases, including Niagara and Northumberland, show contractions. These trends align with broader labour softness in the agri-food and manufacturing space, where Canada-wide payroll employment in food manufacturing fell by 4.7% in 2024 and Ontario's manufacturing employment declined by approximately 1% in 2025, reflecting reduced labour demand across the sector.^{20,21}





Table 9: Total Regional Contributions from Secondary Sectors

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
	<i>CURRENT STUDY</i>			
<i>Census Division</i>				
Dufferin	290	120	59	749
Durham	579	264	134	1,615
Halton	1,784	767	383	4,619
Hamilton	3,933	1,486	745	9,147
Niagara	456	206	100	1,236
Northumberland	33	14	6.8	89
Peel	573	243	124	1,477
York	1,262	577	291	3,429
Greenbelt Total	8,910	3,676	1,842	22,359

Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Table 10: Total Regional Contributions from Secondary Sectors

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
	<i>PREVIOUS STUDY</i>			
<i>Census Division</i>				
Dufferin	187	89	48	700
Durham	440	199	124	1,847
Halton	1,388	676	360	4,967
Hamilton	2,948	1,317	689	9,849
Niagara	480	242	124	1,810
Northumberland	63	27	15	234
Peel	373	155	94	1,279
York	1,055	468	279	3,820
Greenbelt Total	6,935	3,174	1,731	24,506

Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.





4. Results - Economic Impact Assessment

4.2 Province-wide Contributions

Summary of Economic Contribution Results

Regional impacts reflect activity occurring within the Greenbelt and nearby communities, whereas the province-wide impacts in **Table 11** capture the Greenbelt's broader, system-wide contribution to Ontario's economy. Province-wide impacts were greater than regional impacts across sectors as they captured economic activities in neighbouring regions in the province.

On an annual basis, economic activities supported by the Greenbelt contribute at direct, indirect, and induced levels in the provincial economy an estimated total of:

	 Output	 GDP	 Wages	 FTEs
Current Study (2026)	\$37.2B	\$17.0B	\$10.2B	247,213
Previous Study (2020)	\$32.2B	\$15.2B	\$9.6B	212,011





Figures for wages, GDP and output are in millions and reported in constant 2022 \$.

Comparison to Previous Study

Across indicators, agriculture, forestry and fishing as well as food manufacturing, trade and transportation show the strongest gains, while consumer-oriented sectors such as arts and recreation see mild contractions. These changes are likely driven by the impact of COVID-19 on service industries.

- ▶ **Output:** Total output **increased by 15%**. Growth is led by agriculture, forestry and fishing and manufacturing, trade and transportation (28% both). Accommodation and food services also grew at 10%, while arts, entertainment and recreation remained flat, showing only a 2% increase at the total level. The growth in agriculture and manufacturing was driven by productivity and population growth in the province. The accommodation sector is recovering from the impacts of COVID-19, while facing growth constraints driven by labour shortages.²²
- ▶ **GDP:** GDP **increased by 12%**, with the strongest growth in agriculture, forestry and fishing (29%), reflecting expanding primary-sector activity. Manufacturing, trade and transportation grew by 20%, while arts and recreation declined by 3%, indicating weaker output in consumer-facing services.
- ▶ **Wages:** Wage impacts **rose by 6%**, with agriculture, forestry and fishing showing the largest increase (20%). Arts, entertainment and recreation recorded a 14% decline, reflecting the sector's lower GDP-to-wage ratio and its slower recovery from COVID-related disruptions.²³
- ▶ **Employment (FTEs):** Employment **increased by 17%** concentrated in agriculture, forestry and fishing (48%) and accommodation and food services (26%). Manufacturing, trade and transportation shows a modest decline (-3%), consistent with ongoing labour softness in food-related manufacturing.²⁴ Arts and recreation contracted (-15%), reflecting the sector's slower rebound and continued variability in hours and staffing levels.²⁵

Table 11: Province-wide Impacts from Primary and Secondary Sectors

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Province-wide Impacts from Primary Sectors				
Agriculture, Forestry & Fishing				
<i>Direct</i>	2,475	1,088	452	14,234
<i>Indirect & Induced</i>	1,813	939	470	9,833
Total	4,288	2,027	922	24,067
Arts, Entertainment & Recreation				
<i>Direct</i>	2,938	1,397	849	22,234
<i>Indirect & Induced</i>	2,553	1,441	812	15,435
Total	5,491	2,838	1,661	37,669
Accommodation & Food Services				
<i>Direct</i>	8,315	3,733	3,043	115,144
<i>Indirect & Induced</i>	7,458	3,804	1,948	37,191
Total	15,773	7,537	4,991	152,335
Primary Sector Total				
<i>Direct</i>	13,727	6,218	4,344	151,611
<i>Indirect & Induced</i>	11,824	6,184	3,229	62,459
Total	25,551	12,402	7,573	214,071
Province-wide Impacts from Secondary Sectors				
Food Manufacturing, Trade & Transportation				
<i>Direct</i>	6,917	2,436	1,364	14,882
<i>Indirect & Induced</i>	4,747	2,195	1,239	18,260
Total	11,664	4,631	2,602	33,142
Current Study Grand Total				
Total	37,216	17,033	10,176	247,213
Previous Study Grand Total				
Total	32,224	15,197	9,630	212,011

Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

4. Results - Economic Impact Assessment





4.2 Province-wide Contributions

Province-wide Contributions from Primary Sectors

Table 12 and Table 13 display contributions by CD from primary sectors in the Greenbelt to the Province of Ontario. Economic activity for secondary sectors is only considered for CSDs that have 50% or greater area overlap with the Greenbelt. Table 14 and Table 15 display the subset of CDs that meet these criteria.

Primary-sector output and GDP increased by 10.5% and 9.4%, with wages rising 5.1% and FTEs growing more strongly at 20.5%. Northumberland, Wellington, Durham, and Hamilton recorded some of the highest growth rates across output, GDP, and FTEs, reflecting the strength of their agriculture and agri-food bases. In contrast, Dufferin (-6% GDP, -9% wages) and Peel (flat GDP, declining wages) showed weaker performance, consistent with more urban areas where primary-sector activity represents a smaller share of the economy.





Table 12: Total Province-wide Contributions from Primary Sectors

Economic Impact	 Output	 GDP	 Wages	 FTEs
	(\$ million)	(\$ million)	(\$ million)	(Person-Years)
<i>Census Division</i>	<i>CURRENT STUDY</i>			
Bruce	101	49	29	848
Dufferin	392	189	115	3,278
Durham	5,435	2,641	1,616	45,627
Grey	255	123	69	1,860
Halton	2,694	1,309	807	22,769
Hamilton	4,699	2,274	1,388	39,486
Niagara	3,359	1,615	947	26,970
Northumberland	200	97	55	1,505
Peel	525	255	153	4,243
Peterborough	70	34	19	512
Simcoe	210	102	58	1,620
Wellington	247	119	65	1,803
York	7,364	3,596	2,251	63,550
Greenbelt Total	25,551	12,402	7,573	214,071

Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Table 13: Total Province-wide Contributions from Primary Sectors

Economic Impact	 Output	 GDP	 Wages	 FTEs
	(\$ million)	(\$ million)	(\$ million)	(Person-Years)
<i>Census Division</i>	<i>PREVIOUS STUDY</i>			
Bruce	52	26	17	406
Dufferin	413	201	127	3,159
Durham	4,731	2,319	1,482	36,595
Grey	229	112	67	1,603
Halton	2,470	1,215	781	19,279
Hamilton	4,139	2,020	1,279	31,689
Niagara	3,267	1,573	960	23,794
Northumberland	163	79	48	1,172
Peel	516	253	159	3,871
Peterborough	63	31	18	444
Simcoe	198	96	57	1,374
Wellington	213	105	63	1,461
York	6,662	3,305	2,151	52,864
Greenbelt Total	23,116	11,335	7,208	177,711

Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

4. Results - Economic Impact Assessment

4.2 Province-wide Contributions

Province-wide Contributions from Secondary Sectors





Aggregate province-wide contributions from secondary sectors in each CD in the current study and the previous study are provided in **Table 14** and **Table 15**, respectively.

Secondary-sector output and GDP grew 28.1% and 19.9%, with wages up 7.5%, while FTEs fell slightly (-3.4%). The employment decline reflects ongoing manufacturing labour softness in Ontario, where rising operating costs and structural pressures have constrained job growth in several sub-sectors.

Hamilton, Halton, and York stand out with the largest overall secondary-sector impact levels, supported by solid output growth (33.7%, 26.6%, and 18.9%), and together account for 18% of Ontario's food processors, underscoring their central role in the province's processing economy.²⁶

Niagara and Northumberland show declines across all indicators (e.g., Niagara GDP -9.5%, Northumberland GDP -47.5%), consistent with regional manufacturing strain, including declining shipments and uneven investment in parts of Ontario. Niagara has also experienced a 21% reduction in manufacturing employment over the past decade, accompanied by job growth shifting toward construction and service-producing sectors, signalling structural economic transitions.²⁷





Table 14: Total Province-wide Contributions from Secondary Sectors

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
	<i>CURRENT STUDY</i>			
<i>Census Division</i>				
Dufferin	375	150	84	1,069
Durham	728	308	172	2,185
Halton	2,322	947	531	6,776
Hamilton	5,220	1,955	1,103	14,074
Niagara	622	264	147	1,870
Northumberland	42	17	9.7	123
Peel	719	291	164	2,084
York	1,636	699	391	4,962
Greenbelt Total	11,665	4,631	2,602	33,142

Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$.
Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Table 15: Total Province-wide Contributions from Secondary Sectors

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
	<i>PREVIOUS STUDY</i>			
<i>Census Division</i>				
Dufferin	244	107	67	958
Durham	546	251	155	2,308
Halton	1,834	802	498	7,030
Hamilton	3,904	1,574	1,002	14,126
Niagara	658	291	180	2,523
Northumberland	81	33	21	307
Peel	463	195	122	1,708
York	1,376	609	377	5,341
Greenbelt Total	9,107	3,862	2,422	34,300

Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$.
Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

4. Results - Economic Impact Assessment

4.3 Contributions to Government Revenue

Below is a comparison of government revenue estimates between the current EY report and the previous EY report.

Government Revenue Contributions

In addition to economic contributions by sector, the analysis includes an assessment of government revenue generated through primary and secondary sector activities on an annual basis for various levels of government.

Results suggest that on an aggregate basis, **primary sector activities** contribute an estimated **total of \$4.0 billion** in government revenues.

Additionally, **secondary sector activities** in the Greenbelt contribute an estimated **total of \$1.9 billion** in government revenues.

Results are broken down for each level of government in **Table 16**.

Comparison to Previous Study

Compared with the previous study, government revenues generated by Greenbelt-linked economic activity have grown across all tax categories and levels of government.

- ▶ **Primary-sector revenues** increased by **\$457 million (13%)**, driven by strong gains in federal and provincial corporate income taxes (both up 32%).
- ▶ **Secondary-sector revenues** also saw an increase, rising **\$382 million (25%)**, with notable growth in provincial and federal corporate income taxes (30%).

Overall, the comparison indicates growing fiscal contribution from Greenbelt-supported industries.

Table 16: Tax Contributions from Primary and Secondary Sectors

Government Revenue Contributions (\$ million)				
	PREVIOUS STUDY		CURRENT STUDY	
	Primary Sectors	Secondary Sectors	Primary Sectors	Secondary Sectors
<i>Federal</i>				
Taxes on Products	225	59	277	75
Taxes on Production	6.2	1.5	10.2	2.7
Corporate Income Tax	358	180	476	235
Personal Income Tax	1,266	672	1,345	875
<i>Provincial</i>				
Taxes on Products	399	105	435	118
Taxes on Production	125	32	135	36
Corporate Income Tax	275	138	365	180
Personal Income Tax	426	255	453	286
<i>Local</i>				
Taxes on Products	6.4	1.7	9.6	2.6
Taxes on Production	420	107	458	123
Total	3,507	1,551	3,964	1,933

Notes: Figures are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

A cyclist wearing a red helmet and a high-visibility yellow-green jersey is riding a blue road bike on a winding asphalt road. The road curves to the right and has double yellow lines in the center and white lines on the edges. In the background, there is a dense forest of green trees and a large body of water, possibly a lake or reservoir. The scene is bright and sunny.

5. Broader Socioeconomic Contributions

5.1 Social and Community Contributions

5.2 Environmental Contributions

5. Broader Socioeconomic Contributions

5.1 Social and Community Contributions

The Greenbelt delivers a spectrum of social benefits by securing local food systems, supporting everyday access to nature, and safeguarding the environmental conditions that underpin healthy and resilient communities. Its protected landscapes provide opportunities for public and private investment in parks, green infrastructure, and conservation initiatives, reinforcing the Greenbelt's role as a cornerstone of long-term community well-being across the region, which serves as the foundation for Ontario's long term economic growth.

Food Security and Agricultural Resilience²⁸



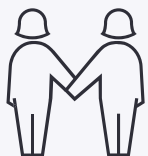
- ▶ The Greenbelt's 750,000 acres of agricultural land, safeguarded through protective policies, is critical for preventing agricultural land loss, fragmentation and incompatible development, securing a vital near-urban food system for Canada.
- ▶ While representing just 6.1% of Ontario's farmland, the Greenbelt delivers notable productivity, generating 68% higher revenue per acre than the provincial average and supplying a large share of Ontario's fruit and vegetable production. With over 4,000 farms and favourable soils, this highly productive land base is critical for strengthening food security, supply-chain efficiency, and regional resilience.

Investment Attraction and Competitiveness



- ▶ As demand grows for resilient and accessible green infrastructure in the GGH, the Greenbelt offers ready investment opportunities from its natural ecosystems and spaces (e.g., forest areas). It also contributes to a knowledge-based economy by providing a stable land-use framework for research and innovation, enabling partnerships with research institutions and industry to advance agricultural and biology research.²⁹
- ▶ It catalyzes multi-partner investment across public and private funders and reduces reliance on individual funders. The Saltfleet Conservation Area project attracted partners including TD Bank Group and Environment and Climate Change Canada, showing Greenbelt's appeal to diverse capital-accelerating climate-resilient upgrades. The project shows strong environmental return potential, such as up to \$14.8 million value in flood mitigation and up to \$15.6 million in biodiversity.^{30,31,32}

Community Well-Being and Quality of Life^{33,34}



- ▶ The Greenbelt underpins economic resilience in the GGH, supporting over 165,000 direct local jobs while safeguarding the natural systems that support these jobs. Its protection of key natural systems also delivers clean air, safe drinking water, and climate moderation. These services can support enhancements in quality of life for over 10 million Ontarians.
- ▶ The Greenbelt enhances residents' quality of life and the attractiveness of the region to families and communities by supporting complete, transit-friendly communities and providing accessible green spaces and outdoor activities, thereby supporting positive physical and mental health outcomes. Some notable attractions include Niagara Peninsula GeoPark on the Niagara Escarpment and EcoAdventures on the Bruce Peninsula that is created around exploring the Greenbelt.

Tourism and Lived Experience



- ▶ As demand for outdoor recreation rises, the Greenbelt serves as vital infrastructure by providing a near-urban network of trails, cycling routes, river corridors, and natural areas. Investments such as upgrades to 160 kilometers of Greenbelt Cycling Route and the creation of Ontario's first Urban Provincial Park in Uxbridge meets growing demand for outdoor recreation and strengthen resident experience.^{35,36}
- ▶ The Greenbelt supports open spaces and a trail network across the region to increase access for a growing population in Ontario. The Greenbelt Value for Nature Survey for Recreation found that from 2020 to 2021, 85% of residents in the GGH participated in nature-based activities. Community can organize and connect around the region's natural and agricultural landscapes.³⁷

5. Broader Socioeconomic Contributions

5.2 Environmental Contributions

The Greenbelt delivers critical environmental value by protecting climate-regulating ecosystems, safeguarding clean water and healthy soils, and preserving extensive forests, wetlands, and natural systems across the region. Its continuous, protected landscape also supports biodiversity, ecological connectivity, and long-term resilience in the face of climate change and rapid regional growth.

Climate Change Mitigation and Adaptation³⁸



- ▶ The Greenbelt serves as a critical climate mitigation asset by safeguarding approximately two million acres of natural ecosystems that can store carbon. By sequestering ~9.9 million tonnes of CO₂ annually, the Greenbelt plays a significant role in advancing climate objectives and enhancing long-term regional resilience.^{39,40}
- ▶ Evidence suggests intensifying climate risks in Ontario (e.g., \$110 million worth of damages from flooding in the Greater Toronto Area (“GTA”) and southern Ontario in 2024).^{41,42} The Greenbelt’s wetlands, floodplains, and river valleys serve as crucial adaptation infrastructure by managing stormwater and mitigating flood risks. These natural systems help reduce vulnerability to increasingly extreme weather events, including damage to private property, public infrastructure and service disruptions.

Soil Health and Landscape Resilience⁴³



- ▶ As urban expansion increases pressure on prime farmland, the Greenbelt safeguards some of Canada’s most fertile agricultural soils by preventing fragmentation and limiting conversion to incompatible development. This protects an irreplaceable, high-productivity land base, supported by favourable microclimates, ensuring long-term agricultural and ecological output that would be difficult to recover once lost.
- ▶ The Greenbelt encourages investment in farming practices, including soil health initiatives that enhance productivity, strengthen supply chain resilience, and improve climate resilience. The Greenbelt is a platform for advancing innovation in soil-health, large-scale soil sampling, and best-practice adoption. These measures help preserve soil structure, organic matter, and therefore support productivity and agricultural viability.

Ecological and Hydrological Backbone^{44,45}



- ▶ The Greenbelt safeguards vital water resources and biodiversity that supports the ecosystem services needed for the region's long-term growth and resilience. The Oak Ridges Moraine and its groundwater resources supply 70% of the base flow to major rivers that drain into Lake Ontario and Lake Simcoe and provide a clean source of drinking water for over 7 million residents.
- ▶ The Greenbelt's 33 Urban River Valleys further support hydrological stability by linking inland ecosystems across rural, suburban and urban areas. Greenbelt initiatives such as the One Million Greenbelt Trees program help strengthen watershed functions in the face of increasing development pressures and climate-related impacts.

Biodiversity Protection^{46,47}



- ▶ As climate change and habitat loss intensify across the GGH, the Greenbelt functions as a cornerstone of regional resilience, protecting an interconnected system of habitats at a landscape scale. This continuous network provides refuge for a high concentration of species-at-risk, supporting species movement, genetic exchange, and the long-term resilience of wildlife populations.
- ▶ This biodiversity supports healthy, resilient and economically vibrant communities. Forests and wetlands filter pollutants and reduce flood risks, pollination supports food security, and the biodiversity supports sectors such as agriculture, tourism, recreation, and forestry. Greenbelt policies protect connectivity and encourage local habitat restoration initiatives such as the Simon Bay Coastal Fen and Forest Nature Preserve, which preserves rare habitat and stores carbon.

A close-up photograph of a hand holding a large, ripe peach. The peach is a mix of red and yellow-orange. The hand is positioned at the bottom, with fingers gently cradling the fruit. In the background, there are several other peaches hanging from a tree, some in focus and some blurred. The leaves are green and vibrant. The overall scene is bright and natural, suggesting a healthy orchard.

6. Opportunity Landscape and Strategic Direction

6.1 Greenbelt's Value Proposition

6.2 Opportunities in the Greenbelt's Economic Sectors

6.3 Strategic Direction to Capture Economic Opportunities

6. Opportunity Landscape and Strategic Direction

6.1 Greenbelt's Value Proposition

Below is an overview of the Greenbelt's value proposition, informed by research and analysis of its unique strengths and market position. The value proposition highlights how it generates economic, environmental, and social value through natural-asset protection, agricultural productivity and food security, access to nature and recreation, and climate-resilience functions.

Value Proposition

Long-term Certainty

- ▶ The legislated, permanent protection framework for the Greenbelt provides a predictable land-use environment, thereby reducing development risk and supporting confidence among communities, governments, and private stakeholders.

A Strategic Food and Agricultural Asset

- ▶ With a sizeable agricultural land base and two of Ontario's specialty crop areas, the Greenbelt is central to agricultural activity.
- ▶ With proximity to Ontario's largest food processing hub, distribution hub, and consumer market, Greenbelt farms support value-added processing opportunities and enable short, reliable supply chains.

Foundation for Regional Economic Prosperity

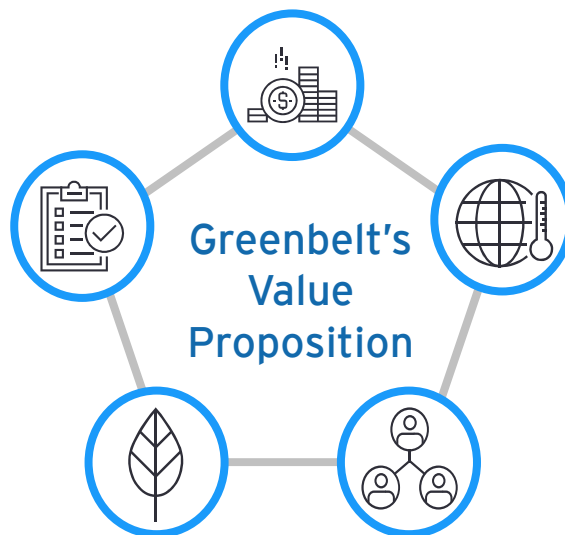
- ▶ The Greenbelt directly and indirectly supports economic activity across agriculture, agri-food processing, tourism, recreation, and related supply chains.
- ▶ Natural and agricultural assets throughout the Greenbelt anchor employment, output, and GDP generation across the GGH while reinforcing the competitiveness of surrounding urban and rural economies.

Critical Infrastructure for Climate Resilience

- ▶ The Greenbelt functions as critical natural infrastructure, supporting crop production, climate resilience and sustainability goals.
- ▶ Its forests, wetlands, soils, and watersheds sequester carbon, manage flood risk and drought, protect drinking water quality, moderate temperatures, and preserve biodiversity.

Platform for Collaboration and Value Creation

- ▶ Greenbelt provides a living landscape for partnerships with leading universities and research bodies to drive science-based innovation in areas such as soil health and biodiversity.
- ▶ By linking natural assets with local infrastructure, the Greenbelt fosters cross-sector collaborations such as advancing environmental stewardship as well as more integrated approaches to land use and infrastructure planning.



6. Opportunity Landscape and Strategic Direction

6.2 Opportunities in the Greenbelt's Economic Sectors

Based on the Greenbelt's value proposition, EY identified key opportunities for private and public stakeholders in the Greenbelt region that can help promote growth in the region.



Agriculture Innovation

- ▶ **Expand controlled-environment agriculture ("CEA"):** New technologies can expand agricultural production for Ontario's greenhouse industry. It has the potential to produce greenhouse berries and leafy greens, enabling Ontario to enter a growing global CEA berry market (expected to reach \$8.8 billion by 2033) and reduce Canada's reliance on imported leafy greens.^{48,49,50} Discussion is needed regarding facility locations within agricultural and rural areas.
- ▶ **Strengthen on-farm natural infrastructure:** Strengthening on-farm natural infrastructure (e.g., riparian buffers and tree cover, soil stability and health, as well as biodiversity) is especially crucial for marginal or less productive farmland. By enhancing the functional value of these lands, projects that demonstrate value for farm operations can also attract additional investments from governments, corporations and philanthropists seeking to invest in nature-based solutions, including stormwater management and broader watershed objectives.



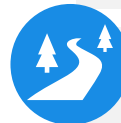
Local Agri-food Processing Growth

- ▶ **Process local and specialty foods:** Leveraging advantages in strong land stewardship and product diversity, the Greenbelt can supply sustainably grown local foods to meet growing domestic demand.⁵¹ Strengthening on-farm or near-farm processing activities, such as washing, cutting, milling, or fermentation, can transform Greenbelt crops into minimally processed, ready-to-use ingredients for regional brands and retailers, while fostering innovation and potential for growth into larger export markets.
- ▶ **Leverage local supply chains:** Increasing the production of select crops with existing local supply chains such as apples, strawberries and eggplants can generate farm-gate revenues and replace imports. Coordinated action is needed to strengthen market development and encourage local food purchasing.



Agri-tourism Experiences

- ▶ **Develop curated farm experiences:** Agri-tourism demand is rising quickly as visitors seek immersive local food and farm-based activities, projected to reach USD 1.8 billion by 2028 in Canada.⁵² Current offerings remain fragmented. Creating bookable, bundled experiences such as U-pick, tours, food trails, and culinary pairings can capture higher visitor spending and interest.⁵³
- ▶ **Expand eco-tourism experiences:** Canada's eco-tourism market is projected to reach USD 15.7 billion by 2030.⁵⁴ In Ontario, increased Go Transit services and bike carriages create opportunity to access the Greenbelt. With 52% of Ontario cyclists in the Greenbelt reporting overnight trips in 2025 and 90% of Ontario visits made by car in 2024, the Greenbelt is well positioned to expand offerings such as cycling, habitat walks, wildlife viewing, and conservation trails.^{55,56}



Nature-based Recreation Expansion

- ▶ **Add parkland and recreation capacity:** The Greenbelt faces the highest recreation demand in Canada, supporting \$2.1 billion in ecosystem services. It is projected to require an additional 32,000 hectares of parkland by 2051 to meet recreation demand as the region's population grows. Expanding trails, natural areas, and recreation amenities can address this growing capacity requirement and rising visitor volumes.⁵⁷
- ▶ **Integrate private lands into trail networks:** Research shows strong potential to incorporate private lands into larger park and trail systems, especially in urban-edge areas with high recreation pressure. Partnerships and easement agreements with landowners can unlock new access corridors without large-scale land acquisition.⁵⁸

6. Opportunity Landscape and Strategic Direction

6.2 Opportunities in the Greenbelt's Economic Sectors

EY evaluated the opportunities based on ease of implementation and potential benefits. This prioritization can assist stakeholders in the Greenbelt region in identifying areas that can deliver near-term progress while also advancing longer-term initiatives.

ID	Opportunity	Segmentation	Rationale
1	Process Local and Specialty Foods	Quick Wins	Easy to build on existing light-processing capacity with modest capital requirements, while meeting growing demand for local and sustainable food products.
2	Develop Curated Farm Experiences		Quick to implement by leveraging existing farm capacity, requiring relatively low capital investment while delivering near-term revenue and community benefits.
3	Expand CEA	Strategic Gains	With additional investment to leverage proven technology base that already exists in Ontario, it can capture growing demand for high-value fruits and vegetables.
4	Expand Eco-tourism Experiences		Scaling would require investment in access and visitor management, and conservation-aligned infrastructure to meet rapidly growing demand.
5	Integrate Private Lands into Trail Networks		Potential to unlock significant capacity without large-scale acquisition but would rely on partnership model, incentives and governance innovation rather than heavy capital spend.
6	Strengthen On-farm Natural Infrastructure	Progressive Initiatives	Crucial climate and environmental benefits to enhance farmland functions but may have longer payback periods. Requires ecosystem coordination and investor attraction.
7	Leverage Local Supply Chains		Increase the production of crops with existing local supply chains such as apples, strawberries and eggplants to generate farm-gate revenues and reduce dependency on imports. Coordinated action is needed to strengthen market development and encourage local food purchasing.
8	Add Parkland and Recreational Capacity	Transformative Options	High capital intensity and land-acquisition complexity. Critical for future demand, but long lead times and multi-jurisdiction coordination required.



6. Opportunity Landscape and Strategic Direction

6.3 Strategic Direction to Capture Economic Opportunities

EY developed strategies and actions, informed by best-practice research and EY's sector expertise, that can strengthen stakeholders' efforts to pursue these opportunities effectively in the Greenbelt Region.



1. Coordinate Research and Innovation Partnerships

Current State: While universities, research institutions and municipalities engage with the Greenbelt on multiple research and innovation initiatives, these operate in parallel. A centralized approach to bring researchers, local communities, agriculture businesses, and municipalities together around real-world challenges can amplify the region's ability to scale and capture emerging opportunities.

What Others are Doing: The Climate-Responsive Opportunities for Plant Science (CROPS) initiative in the United States is a 42-county regional ecosystem that connects farmers, universities, markets, and others to advance climate-responsive agriculture.⁵⁹

The Strategy - Coordinate Research and Innovation Efforts: A coordinated innovation cluster can connect farmers, researchers, municipalities, local businesses and market partners to align research with on-the-ground challenges, accelerate adoption, and strengthen competitiveness to seize diverse opportunities from agroforestry to eco-tourism. The strategy would facilitate producer-led trials, targeted knowledge transfer, and access to early market intelligence.⁶⁰

Key Actions

- ▶ **Cross-municipality coordination:** Enable dialogue among Greenbelt municipalities through a shared cross-boundary approach to managing contiguous ecosystems. This can enable coordinated natural-asset management and urban planning, as well as a common understanding of challenges and best practice solutions.
- ▶ **Applied research partnerships:** Coordinate research partnerships that translate on-farm and other ecosystem challenges into practical solutions, technologies, and adoption support. Ensure these efforts build on each other for greater benefits.



2. Strengthen Recreation and Nature-Based Experience Offerings

Current State: With its two million acres of protected land, 33 Urban River Valley, lakes, extensive forests, wetlands, and trail networks, the Greenbelt creates diverse opportunities for recreation. Planning and coordination that can offer greater continuity across many connected assets (e.g., trails) can help create more seamless and rewarding visitor experiences.

What Others are Doing: The Netherlands' Green Heart is supported by a coordinated government-led tourism approach, including the development of a dedicated, centralized tourism portal that integrates regional assets into a coherent visitor value proposition.⁶¹

The Strategy - Strengthen Greenbelt's Visibility: Strengthen the Greenbelt's visibility as a connected, high-quality destination by improving coordinated marketing, programming, and promotion across its trails, parks, river corridors, cycling routes, and cultural-ecological sites. Additionally, with clearer pathways for visitors to support rural economies and better-coordinated promotion and investment, the Greenbelt can position itself as Canada's leading outdoor recreation hub.

Key Actions

- ▶ **Greenbelt experience network:** Create a coordinated network linking trails, parks, river valleys, cycling routes, and cultural sites into a unified visitor experience.
- ▶ **Visitor infrastructure:** Improve signage, wayfinding, trailheads, and access points to ensure consistent, high-quality experiences across the Greenbelt.
- ▶ **Coordinating shared assets:** Alignment on shared assets, such as the Bruce Trail spanning across a large portion of the Greenbelt area, can help make trip-planning simple and engaging.

6. Opportunity Landscape and Strategic Direction

6.3 Strategic Direction to Capture Economic Opportunities

EY developed strategies and actions, informed by best-practice research and EY's sector expertise, that can strengthen stakeholders' efforts to pursue these opportunities effectively in the Greenbelt Region.



3. Position Greenbelt for Natural Capital Investment

Current State: The Greenbelt's forests, wetlands, headwaters, and other ecosystems deliver substantial climate-resilience benefits, yet the region lacks a clear way to connect emerging private interest in climate risk mitigation opportunities and nature investment with on-the-ground restoration opportunities. Without a coordinated approach or defined project pathways, the Greenbelt's natural assets may remain underutilized, leaving substantial potential to scale natural infrastructure improvements to reduce risks and carbon emissions across the region.⁶²

What Others are Doing: Greater Manchester developed the Natural Capital Investment Plan with guidelines and finance models to attract private funding into nature projects.⁶³

The Strategy - Position the Greenbelt as a Natural Infrastructure Backbone: As private companies scale investments in nature-based solutions to manage risks—funding forest restoration, wetland enhancement, regenerative agriculture, and carbon-credit projects—the development of a coordinated plan can help channel this capital into priority corridors and project-ready natural-infrastructure improvements.

Key Actions

- ▶ **Resilience zones and habitat corridors:** Coordinate with municipalities and conservation groups to identify, map and target areas for restoration that can provide nature-based solutions.
- ▶ **Project pipeline:** Identify, prioritize, and package implementation-ready restoration projects into clearly defined investment opportunities aligned with climate, biodiversity, and water outcomes, such as damage prevention for private property and public infrastructure.
- ▶ **Investment-ready pathways:** Create standardized project governance metrics that enable private investors to deploy capital efficiently in nature-based solutions.



4. Develop Local Food and Market Integration Program

Current State: Ontario's Greenbelt producers are not yet fully integrated into regional markets due to fragmented supply chains, limited aggregation capacity, and insufficient municipal resources to support coordinated local food distribution. Small and medium farmers face barriers accessing larger buyers because existing procurement systems favour high-volume distributors. As a result, the Greenbelt's potential to anchor a strong regional agri-food economy remains underleveraged.⁶⁴

What Others are Doing: Shared technology and coordinated hub operations of Northwest Food Hub Network in the US help expand institutional market access and generate new revenue for regional farmers.⁶⁵

The Strategy - Strengthen Local Food Mandate for Public Institutions: Help Greenbelt and local producers reliably sell into regional institutional, retail, and commercial channels by coordinating aggregation, buyer requirements, and product visibility. Strengthen relationships between producers and buyers.

Key Actions

- ▶ **Short supply chain hubs:** Support and expand regional aggregation and distribution hubs, including the Ontario Food Terminal, to streamline logistics and improve market access.
- ▶ **Regional buyer partnerships:** Establish coordinated procurement networks that simplify how institutional, retail, and commercial buyers source from local producers, supporting easier market access to consistent local supply and procurement budgets.
- ▶ **Strengthen local procurement policy support:** Strengthen the policy framework for public institutions to support local procurement while remaining compliant with trade obligations.

An aerial photograph showing a winding river with several meanders, flowing through a dense green forest. The river is surrounded by lush vegetation and green fields. A small bridge crosses the river in the lower right portion of the image. The overall scene is a vibrant, natural landscape.

Appendices

A.1 Census Subdivisions

A.2 Industries

A.3 Detailed Economic Contribution Results

A.4 Definitions

A.5 Input-Output Model: Assumptions and
Limitations

A.6 References

Appendix A.1 Census Subdivisions

Table A1. Mapping of Census Subdivisions to Census Divisions

	CD	CSD	Overlap with Greenbelt
1	Bruce	Northern Bruce Peninsula	< 50%
2	Dufferin	Mono	< 50%
3	Dufferin	Mulmur	< 50%
4	Dufferin	Orangeville	> 50%
5	Durham	Brock	> 50%
6	Durham	Uxbridge	> 50%
7	Durham	Scugog	> 50%
8	Durham	Clarington	> 50%
9	Durham	Oshawa	< 50%
10	Durham	Whitby	< 50%
11	Durham	Ajax	< 50%
12	Durham	Pickering	< 50%
13	Grey	Georgian Bluffs	< 50%
14	Grey	The Blue Mountains	< 50%
15	Halton	Halton Hills	> 50%
16	Halton	Milton	> 50%
17	Halton	Burlington	> 50%
18	Hamilton	Hamilton	> 50%
19	Niagara	Lincoln	> 50%
20	Niagara	St. Catharines	< 50%
21	Niagara	Pelham	> 50%
22	Niagara	Niagara-on-the-Lake	> 50%

	CD	CSD	Overlap with Greenbelt
23	Niagara	Thorold	< 50%
24	Niagara	Grimsby	> 50%
25	Northumberland	Alnwick/Haldimand	< 50%
26	Northumberland	Hamilton Township	< 50%
27	Peel	Caledon	> 50%
28	Peterborough	Cavan Monaghan	< 50%
29	Simcoe	Clearview	< 50%
30	Wellington	Erin	< 50%
31	Wellington	Puslinch	< 50%
32	York	Richmond Hill	> 50%
33	York	Markham	< 50%
34	York	Vaughan	< 50%
35	York	Georgina	< 50%
36	York	East Gwillimbury	> 50%
37	York	King	> 50%
38	York	Aurora	> 50%
39	York	Whitchurch-Stouffville	> 50%

Appendix A.2 Industries

Table A2. Detailed Industries Related to Ontario's Greenbelt

NAICS Industry Description	Detailed Industries Included
111 Crop production	Oilseed and grain farming; Vegetable and melon farming; Fruit and tree nut farming; Greenhouse, nursery and floriculture production; Other crop farming
112 Animal production and aquaculture	Cattle ranching and farming; Hog and pig farming; Poultry and egg production; Sheep and goat farming; Aquaculture; Other animal production
113 Forestry and logging	Timber tract operations; Forest nurseries and gathering of forest products; Logging
114 Fishing, hunting and trapping	Fishing; Hunting and trapping
115 Support activities for agriculture and forestry	Support activities for crop production; Support activities for animal production; Support activities for forestry
311 Food manufacturing	Animal food manufacturing; Grain and oilseed milling; Sugar and confectionery product manufacturing; Fruit and vegetable preserving and speciality food manufacturing; Dairy product manufacturing; Meat product manufacturing; Seafood product preparation and packaging; Bakeries and tortilla manufacturing; Other food manufacturing
312 Beverage and tobacco product manufacturing	Beverage manufacturing; Tobacco manufacturing
33311 Agricultural implement manufacturing	Agricultural implement manufacturing
411 Farm product merchant wholesalers	Farm product merchant wholesalers
413 Food, beverage and tobacco merchant wholesalers	Food merchant wholesalers; Beverage merchant wholesalers; Cigarette and tobacco product merchant wholesalers
418 Miscellaneous merchant wholesalers	Agricultural supplies merchant wholesalers

NAICS Industry Description	Detailed Industries Included
444 Building material and garden equipment and supplies dealers	Lawn and garden equipment and supplies stores
5615 Travel arrangement and reservation services	Travel arrangement and reservation services
711 Performing arts, spectator sports and related industries	Performing arts companies; Spectator sports; Promoters (presenters) of performing arts, sports and similar events; Agents and managers for artists, athletes, entertainers and other public figures; Independent artists, writers and performers
712 Heritage institutions	Heritage institutions
713 Amusement, gambling and recreation industries	Golf courses and country clubs; Skiing facilities; Marinas; Fitness and recreational sports centres; Other amusement and recreation industries; Sports clubs, teams and leagues performing before a non-paying audience; Other sports facilities; All other amusement and recreation industries
721 Accommodation services	Traveller accommodation; Recreational vehicle (RV) parks and recreational camps
722 Food services and drinking places	Special food services; Drinking places (alcoholic beverages); Full-service restaurants and limited-service eating places
487 Scenic and sightseeing transportation	Scenic and sightseeing transportation, land; Scenic and sightseeing transportation, water; Scenic and sightseeing transportation, other
445 Food and beverage stores	Specialty food stores
493 Warehousing and storage	Refrigerated warehousing and storage; Farm product warehousing and storage

Appendix A.3 Detailed Economic Contribution Results





Bruce County

Located in Southwestern Ontario, Bruce County forms part of the GGH and overlaps with the Greenbelt. With the analysis restricted to the CSD of Northern Bruce Peninsula in Bruce County, results suggest that on an annual basis, activities in the primary sectors supported by the Greenbelt contribute an estimated total of \$79 million in gross output, \$35 million in GDP, \$23 million in labour income, and sustain approximately 718 FTEs at direct, indirect, and induced levels in the regional economy. The results are shown in **Table A3.1**.

Since the Greenbelt has a relatively small degree of overlap with Northern Bruce Peninsula, the analysis is limited to primary sectors, which are more likely to directly benefit from their proximity to the Greenbelt due to supply chain linkages.

Additionally, tax contributions from primary sector activities in Bruce County are summarized in **Table A3.2** below. Results suggest that activities in primary Greenbelt sectors in Bruce County contribute \$23 million in local, provincial, and federal taxes.

Table A3.1: Regional and Province-wide Contributions from Primary Sectors in Bruce County

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Regional Contributions from Primary Sectors in Bruce County				
Northern Bruce Peninsula				
<i>Direct</i>	54	24	17	601
<i>Indirect</i>	17	6.3	4.5	89
<i>Induced</i>	7.6	4.1	1.4	28
Total	79	35	23	718
Province-wide Contributions from Primary Sectors in Bruce County				
Northern Bruce Peninsula				
<i>Direct</i>	54	24	17	601
<i>Indirect</i>	29	14	8.0	151
<i>Induced</i>	17	10	4.7	97
Total	101	49	29	848

Figures for wages, GDP and output are in millions and reported in constant 2022 \$.

Notes: Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Table A3.2: Tax Contributions in Bruce County

Government Revenue Contributions (\$ million)	
	Primary Sectors
<i>Federal</i>	
Taxes on Products	1.1
Taxes on Production	0.0
Corporate Income Tax	3.2
Personal Income Tax	8.9
<i>Provincial</i>	
Taxes on Products	1.7
Taxes on Production	0.5
Corporate Income Tax	2.4
Personal Income Tax	3.0
<i>Local</i>	
Taxes on Products	0.0
Taxes on Production	1.8
Total	23

Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.

Notes:

Sources:

Statistics Canada and EY analysis.

Appendix A.3 Detailed Economic Contribution Results

Dufferin County





Total economic contribution from Dufferin County is displayed for all primary and secondary sectors in **Table A3.3** below.

Several CSDs in Dufferin County have significant overlap with the Greenbelt, including Mono, Mulmur, and Orangeville. On an aggregate level, results suggest that on an annual basis, activities in the primary sectors supported by the Greenbelt contribute an estimated total of \$294 million in gross output, \$128 million in GDP, \$84 million in labour income, and sustain approximately 2,691 FTEs at direct, indirect, and induced levels in the regional economy of Dufferin County. Further details regarding regional and province-wide contributions by primary sectors in each CSD in Dufferin County are provided in **Table A3.5** and **A3.7**.

The economic contributions of secondary sector activities in Dufferin County are estimated for Orangeville, as it is the only CSD with greater than 50% area overlap with the Greenbelt. Results for regional and province-wide contributions for secondary sectors are provided in **Table A3.6** and **A3.8**. Secondary sectors contribute an estimated total of \$290 million in gross output, \$120 million in GDP, \$59 million in labour income, and sustain approximately 749 FTEs at direct, indirect and induced levels in the regional economy.

Tax contributions from primary and secondary sector activities in Dufferin County are summarized in **Table A3.4**. Results suggest that activities in primary Greenbelt sectors in Dufferin County contribute \$54 million in local, provincial, and federal taxes. Additionally, activities from secondary sectors in the region contribute a total of \$51 million in total taxes.

Table A3.3: Regional Contributions from Primary and Secondary Sectors in Dufferin County

	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Regional Contributions from Primary Sectors in Dufferin County				
Primary Sectors				
<i>Direct</i>	210	94	66	2,324
<i>Indirect</i>	58	26	14	283
<i>Induced</i>	25	7.7	4.2	84
Total	294	128	84	2,691
Regional Contributions from Secondary Sectors in Dufferin County				
Primary Sectors				
<i>Direct</i>	223	79	44	480
<i>Indirect</i>	52	18	12	180
<i>Induced</i>	16	23	2.7	89
Total	290	120	59	749

Figures for wages, GDP and output are in millions and reported in constant 2022 \$.

Notes: Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Table A3.4: Tax Contributions in Dufferin County

Government Revenue Contributions (\$ million)	Government Revenue Contributions (\$ million)	
	Primary Sectors	Secondary Sectors
<i>Federal</i>		
Taxes on Products	4.2	2.4
Taxes on Production	0.2	0.1
Corporate Income Tax	6.0	6.1
Personal Income Tax	17	21
<i>Provincial</i>		
Taxes on Products	6.6	3.8
Taxes on Production	2.1	1.2
Corporate Income Tax	4.6	4.7
Personal Income Tax	5.7	8.3
<i>Local</i>		
Taxes on Products	0.1	0.1
Taxes on Production	7.0	4.0
Total	54	51

Figures for wages, GDP and output are in millions and reported in constant 2022 \$.





Notes: \$. Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Appendix A.3 Detailed Economic Contribution Results

Dufferin County





Table A3.5: Regional Contributions from Primary Sector in Dufferin County

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Regional Contributions from Primary Sectors				
Mono				
<i>Direct</i>	52	23	15	501
<i>Indirect</i>	15	6.4	3.4	70
<i>Induced</i>	5.5	1.8	0.9	21
Total	73	31	19	592
Mulmur				
<i>Direct</i>	21	9.3	5.3	178
<i>Indirect</i>	5.9	2.6	1.4	31
<i>Induced</i>	2.0	0.4	0.3	8
Total	29	12	7.0	218
Orangeville				
<i>Direct</i>	137	62	46	1,645
<i>Indirect</i>	38	17	9.7	182
<i>Induced</i>	17	5.4	3.0	54
Total	192	85	58	1,881
Grand Total (Dufferin)				
<i>Direct</i>	210	94	66	2,324
<i>Indirect</i>	58	26	14	283
<i>Induced</i>	25	7.7	4.2	84
Total	294	128	84	2,691

Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Table A3.6: Regional Contributions from Secondary Sector in Dufferin County

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Regional Contributions from Secondary Sectors				
Orangeville				
<i>Direct</i>	223	79	44	480
<i>Indirect</i>	52	18	12	180
<i>Induced</i>	16	23	2.7	89
Total	290	120	59	749
Grand Total (Dufferin)				
<i>Direct</i>	223	79	44	480
<i>Indirect</i>	52	18	12	180
<i>Induced</i>	16	23	2.7	89
Total	290	120	59	749





Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Appendix A.3 Detailed Economic Contribution Results

Dufferin County





Table A3.7: Province-wide Contributions from Primary Sector in Dufferin County

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Province-wide Contributions from Primary Sectors				
Mono				
<i>Direct</i>	52	23	15	501
<i>Indirect</i>	28	13	7.5	139
<i>Induced</i>	15	9.0	4.2	86
Total	96	46	26	726
Mulmur				
<i>Direct</i>	21	9.3	5.3	178
<i>Indirect</i>	11	5.5	3.1	60
<i>Induced</i>	5.8	3.4	1.6	33
Total	38	18	9.9	272
Orangeville				
<i>Direct</i>	137	62	46	1,645
<i>Indirect</i>	74	36	20	381
<i>Induced</i>	47	27	13	255
Total	258	125	79	2,280
Grand Total (Dufferin)				
<i>Direct</i>	210	94	66	2,324
<i>Indirect</i>	113	55	31	579
<i>Induced</i>	68	40	18	374
Total	392	189	115	3,278

Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Table A3.8: Province-wide Contributions from Secondary Sector in Dufferin County

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Province-wide Contributions from Secondary Sectors				
Orangeville				
<i>Direct</i>	223	79	44	480
<i>Indirect</i>	104	42	27	359
<i>Induced</i>	49	28	13	230
Total	375	150	84	1,069
Grand Total (Dufferin)				
<i>Direct</i>	223	79	44	480
<i>Indirect</i>	104	42	27	359
<i>Induced</i>	49	28	13	230
Total	375	150	84	1,069

Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Appendix A.3 Detailed Economic Contribution Results





Durham Region

All CSDs in the Durham Region have more than 20% overlap with the Greenbelt. At a regional level, primary-sector activities supported by the Greenbelt contribute an estimated \$4.4 billion in output, \$2.0 billion in GDP, \$1.3 billion in labour income, and 39,077 FTEs across direct, indirect, and induced effects in Dufferin County. Results by impact type are shown in **Table A3.9**, with CSD-level details in **Tables A3.11** and **A3.14**.

Secondary-sector activities contribute an estimated \$579 million in output, \$264 million in GDP, \$134 million in labour income, and 1,615 FTEs. Only four CSDs, Brock, Clarington, Scugog, and Uxbridge, exceed the 50% overlap threshold and are therefore included in the secondary-sector analysis shown in **Table A3.12**. Province-wide secondary-sector impacts for Durham Region are provided in **Table A3.13**.

Tax contributions from primary and secondary sector activities in Durham Region are summarized in **Table A3.10**. Results suggest that activities in primary Greenbelt sectors in Durham Region contribute \$758 million in local, provincial, and federal taxes. Additionally, activities from secondary sectors in the region contribute a total of \$100 million in total taxes.

Table A3.9: Regional Contributions from Primary and Secondary Sectors in Durham Region

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Regional Contributions from Primary Sectors in Durham Region				
Primary Sectors				
<i>Direct</i>	2,916	1,321	926	32,276
<i>Indirect</i>	960	515	291	5,266
<i>Induced</i>	489	169	101	1,534
Total	4,365	2,006	1,318	39,077
Regional Contributions from Secondary Sectors in Durham Region				
Secondary Sectors				
<i>Direct</i>	430	166	93	1,002
<i>Indirect</i>	104	38	32	408
<i>Induced</i>	46	60	10	204
Total	579	264	134	1,615

Figures for wages, GDP and output are in millions and reported in constant 2022 \$.

Notes: Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Table A3.10: Tax Contributions in Durham Region

Government Revenue Contributions (\$ million)		
	Primary Sectors	Secondary Sectors
<i>Federal</i>		
Taxes on Products	59	5.0
Taxes on Production	2.2	0.2
Corporate Income Tax	85	12
Personal Income Tax	242	40
<i>Provincial</i>		
Taxes on Products	93	7.8
Taxes on Production	29	2.4
Corporate Income Tax	65	9.0
Personal Income Tax	82	16
<i>Local</i>		
Taxes on Products	2.1	0.2
Taxes on Production	98	8.0
Total	758	100

Figures for wages, GDP and output are in millions and reported in constant 2022 \$.





Notes: \$. Numbers may not add up due to rounding.





Sources: Statistics Canada and EY analysis.

Appendix A.3 Detailed Economic Contribution Results

Durham Region

Table A3.11: Regional Contributions from Primary Sector in Durham Region

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Regional Contributions from Primary Sectors				
Ajax				
Direct	500	229	170	5,984
Indirect	164	89	50	886
Induced	90	32	18	265
Total	754	349	239	7,134
Brock				
Direct	78	34	20	670
Indirect	25	13	7.2	138
Induced	11	3.2	2.2	40
Total	114	51	29	848
Clarington				
Direct	453	204	138	4,784
Indirect	149	79	44	808
Induced	73	25	15	236
Total	674	308	197	5,828
Oshawa				
Direct	678	307	225	7,972
Indirect	224	121	68	1,214
Induced	119	42	24	355
Total	1,020	470	318	9,541
Pickering				
Direct	369	170	121	4,147
Indirect	121	66	38	675
Induced	64	22	13	199
Total	554	258	172	5,021

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Regional Contributions from Primary Sectors (cont.)				
Scugog				
Direct	133	59	34	1,164
Indirect	43	22	12	239
Induced	18	5.6	3.8	68
Total	195	87	50	1,471
Uxbridge				
Direct	149	66	38	1,271
Indirect	49	25	14	276
Induced	20	6.1	4.2	77
Total	218	97	56	1,623
Whitby				
Direct	557	252	180	6,284
Indirect	185	100	57	1,031
Induced	94	33	20	294
Total	836	386	256	7,610
Grand Total (Durham)				
Direct	2,916	1,321	926	32,276
Indirect	960	515	291	5,266
Induced	489	169	101	1,534
Total	4,365	2,006	1,318	39,077





Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Appendix A.3 Detailed Economic Contribution Results

Durham Region





Table A3.12: Regional Contributions from Secondary Sector in Durham Region

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Regional Contributions from Secondary Sectors				
Brock				
<i>Direct</i>	36	14	8.0	86
<i>Indirect</i>	8.6	3.2	2.7	35
<i>Induced</i>	4.0	5.2	0.9	18
Total	48	23	11	139
Clarington				
<i>Direct</i>	226	91	51	546
<i>Indirect</i>	55	20	17	223
<i>Induced</i>	25	33	5.5	114
Total	306	145	73	883
Scugog				
<i>Direct</i>	97	34	19	207
<i>Indirect</i>	23	8.6	6.8	84
<i>Induced</i>	9.5	12	2.0	39
Total	130	54	28	330
Uxbridge				
<i>Direct</i>	70	27	15	164
<i>Indirect</i>	17	6.3	5.2	67
<i>Induced</i>	7.5	9.6	1.6	33
Total	95	43	22	263
Grand Total (Durham)				
<i>Direct</i>	430	166	93	1,002
<i>Indirect</i>	104	38	32	408
<i>Induced</i>	46	60	10	204
Total	579	264	134	1,615

Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Table A3.13: Province-wide Contributions from Secondary Sector in Durham Region

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Province-wide Contributions from Secondary Sectors				
Brock				
<i>Direct</i>	36	14	8.0	86
<i>Indirect</i>	16	6.9	4.4	59
<i>Induced</i>	8.6	5.0	2.3	40
Total	60	26	15	185
Clarington				
<i>Direct</i>	226	91	51	546
<i>Indirect</i>	103	44	28	377
<i>Induced</i>	55	32	15	257
Total	384	167	93	1,180
Scugog				
<i>Direct</i>	97	34	19	207
<i>Indirect</i>	46	19	12	156
<i>Induced</i>	21	12	5.7	99
Total	164	65	36	462
Uxbridge				
<i>Direct</i>	70	27	15	164
<i>Indirect</i>	33	14	8.6	116
<i>Induced</i>	16	9.5	4.4	77
Total	119	50	28	357
Grand Total (Durham)				
<i>Direct</i>	430	166	93	1,002
<i>Indirect</i>	198	83	53	708
<i>Induced</i>	100	59	27	474
Total	728	308	172	2,185





Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.





Sources: Statistics Canada and EY analysis.

Appendix A.3 Detailed Economic Contribution Results

Durham Region

Table A3.14: Province-wide Contributions from Primary Sector in Durham Region

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Province-wide Contributions from Primary Sectors				
Ajax				
Direct	500	229	170	5,984
Indirect	267	129	74	1,368
Induced	173	101	47	933
Total	941	459	291	8,284
Brock				
Direct	78	34	20	670
Indirect	41	20	11	217
Induced	22	13	5.8	125
Total	140	67	37	1,012
Clarington				
Direct	453	204	138	4,784
Indirect	241	118	66	1,251
Induced	144	84	39	794
Total	838	406	243	6,828
Oshawa				
Direct	679	307	225	7,972
Indirect	363	176	100	1,873
Induced	231	134	62	1,251
Total	1,271	617	387	11,096
Pickering				
Direct	369	170	121	4,147
Indirect	196	96	55	1,028
Induced	125	73	34	673
Total	690	339	210	5,848

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Province-wide Contributions from Primary Sectors (cont.)				
Scugog				
Direct	133	59	34	1,164
Indirect	71	35	19	374
Induced	37	22	10	215
Total	241	116	63	1,753
Uxbridge				
Direct	149	66	38	1,271
Indirect	79	39	22	426
Induced	41	24	11	238
Total	269	130	71	1,936
Whitby				
Direct	557	252	180	6,284
Indirect	299	146	84	1,574
Induced	186	108	50	1,011
Total	1,042	507	314	8,869
Grand Total (Durham)				
Direct	2,916	1,321	926	32,276
Indirect	1,558	760	433	8,112
Induced	960	560	258	5,239
Total	5,435	2,641	1,616	45,627

Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Appendix A.3 Detailed Economic Contribution Results





Grey County

Grey County is located approximately 170 kilometres north of Toronto. The local economy has its strengths in tourism and agriculture, with vast resources and recreational assets in the region, including the Blue Mountain Resort, the Niagara Escarpment and Georgian Bay. Given the relatively small degree of geographic overlap in Grey County, the analysis is restricted to the CSDs of Georgian Bluffs and the Blue Mountains.

On an aggregate level, results suggest that on an annual basis, activities in the primary sectors supported by the Greenbelt contribute an estimated total of \$175 million in gross output, \$80 million in GDP, \$44 million in labour income, and sustain approximately 1,376 FTEs at direct, indirect, and induced levels in the regional economy of Grey County. Economic contribution results are broken down by direct, indirect and induced contributions for primary sectors in **Table A3.15**. Further details regarding economic contributions by each CSD in Grey County are provided in **Table A3.17** and **A3.18**.

Since the Greenbelt has a relatively small degree of overlap with CSDs in Grey County, the analysis is limited to primary sectors, which are more likely to directly benefit from their proximity to the Greenbelt due to supply chain linkages. Tax contributions from primary and secondary sector activities in Grey County are summarized in **Table A3.16** below. Results suggest that activities in primary Greenbelt sectors in Grey County contribute \$34 million in local, provincial, and federal taxes.

Table A3.15: Regional Contributions from Primary Sectors in Grey County

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Regional Contributions from Primary Sectors in Grey County				
Primary Sectors				
<i>Direct</i>	140	63	38	1,244
<i>Indirect</i>	25	10	5.4	108
<i>Induced</i>	10	7.3	1.3	24
Total	175	80	44	1,376

Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Table A3.16: Tax Contributions in Grey County

Government Revenue Contributions (\$ million)	
	Primary Sectors
<i>Federal</i>	
Taxes on Products	2.6
Taxes on Production	0.1
Corporate Income Tax	4.3
Personal Income Tax	10.1
<i>Provincial</i>	
Taxes on Products	4.0
Taxes on Production	1.4
Corporate Income Tax	3.3
Personal Income Tax	3.4
<i>Local</i>	
Taxes on Products	0.1
Taxes on Production	4.7
Total	34





Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Appendix A.3 Detailed Economic Contribution Results

Grey County





Table 3.17: Regional Contributions from Primary Sector in Grey County

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Regional Contributions from Primary Sectors				
Georgian Bluffs				
<i>Direct</i>	70	31	18	581
<i>Indirect</i>	12	5.0	2.6	53
<i>Induced</i>	5.2	3.9	0.6	13
Total	87	40	21	647
The Blue Mountains				
<i>Direct</i>	70	32	20	663
<i>Indirect</i>	12	5.3	2.8	54
<i>Induced</i>	5.2	3.4	0.7	11
Total	88	40	23	729
Grand Total (Grey)				
<i>Direct</i>	140	63	38	1,244
<i>Indirect</i>	25	10	5.4	108
<i>Induced</i>	10	7.3	1.3	24
Total	175	80	44	1,376

Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Table 3.18: Province-wide Contributions from Primary Sector in Grey County

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Province-wide Contributions from Primary Sectors				
Georgian Bluffs				
<i>Direct</i>	70	31	18	581
<i>Indirect</i>	37	18	10	189
<i>Induced</i>	20	11	5.2	110
Total	126	61	33	879
The Blue Mountains				
<i>Direct</i>	70	32	20	663
<i>Indirect</i>	37	18	10	199
<i>Induced</i>	21	12	5.6	118
Total	129	62	36	980
Grand Total (Grey)				
<i>Direct</i>	140	63	38	1,244
<i>Indirect</i>	74	37	20	388
<i>Induced</i>	41	24	11	228
Total	255	123	69	1,860

Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Appendix A.3 Detailed Economic Contribution Results

Halton Region





Located west of Toronto and forming part of the The Greater Toronto and Hamilton Area (“GTHA”), the Region of Halton has a diversified economy with strengths in sectors such as advanced manufacturing, finance, food and beverage, life sciences, professional services and technology.⁶⁶ In the Halton Region, primary and secondary sector contributions are estimated for the CSDs of Burlington, Halton Hills, and Milton.

Results suggest that on an annual basis, activities in the primary sectors supported by the Greenbelt contribute an estimated total of \$2.0 billion in gross output, \$921 million in GDP, \$614 million in labour income, and sustain approximately 18,483 FTEs at direct, indirect, and induced levels in the regional economy of Halton (Table A3.19). Further details regarding economic contributions by each CSD in Halton Region are provided in Table A3.21 and A3.23.

The secondary sectors contribute an estimated total of \$1.8 billion in gross output, \$767 million in GDP, \$383 million in labour income, and sustain approximately 4,619 FTEs at direct, indirect and induced levels in the regional economy. Additional details for secondary sectors by each CSD in the Halton Region are provided in Table A3.22 and A3.24.

Tax contributions from primary and secondary sector activities in Halton Region are summarized in Table A3.20 below. Results suggest that activities in primary Greenbelt sectors in Halton Region contribute \$377 million in local, provincial, and federal taxes. Additionally, activities from secondary sectors in the region contribute a total of \$278 million in total taxes.

Table A3.19: Regional Contributions from Primary and Secondary Sectors in Halton Region

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Regional Contributions from Primary Sectors in Halton				
Primary Sectors				
<i>Direct</i>	1,442	653	463	16,146
<i>Indirect</i>	402	204	113	1,870
<i>Induced</i>	198	64	37	467
Total	2,042	921	614	18,483
Regional Contributions from Secondary Sectors in Halton				
Secondary Sectors				
<i>Direct</i>	1,372	502	281	3,076
<i>Indirect</i>	299	118	80	1,025
<i>Induced</i>	113	146	22	518
Total	1,784	767	383	4,619

Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Table A3.20: Tax Contributions in Halton Region

Government Revenue Contributions (\$ million)		
	Primary Sectors	Secondary Sectors
<i>Federal</i>		
Taxes on Products	30	15
Taxes on Production	1.1	0.6
Corporate Income Tax	41	37
Personal Income Tax	121	108
<i>Provincial</i>		
Taxes on Products	47	24
Taxes on Production	14	7.3
Corporate Income Tax	32	28
Personal Income Tax	41	34
<i>Local</i>		
Taxes on Products	1.0	0.5
Taxes on Production	49	24
Total	377	278





Notes: Figures for wages, GDP and output are in millions and 2022 \$. Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Appendix A.3 Detailed Economic Contribution Results

Halton Region





Table A3.21: Regional Contributions from Primary Sectors in Halton Region

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Regional Contributions from Primary Sectors				
Burlington				
<i>Direct</i>	720	326	235	8,188
<i>Indirect</i>	202	103	57	948
<i>Induced</i>	100	33	19	236
Total	1,022	462	311	9,372
Halton Hills				
<i>Direct</i>	259	117	79	2,747
<i>Indirect</i>	71	36	20	330
<i>Induced</i>	34	10	6.2	79
Total	364	163	105	3,156
Milton				
<i>Direct</i>	463	210	150	5,211
<i>Indirect</i>	129	65	36	593
<i>Induced</i>	64	21	12	152
Total	656	296	198	5,956
Grand Total (Halton)				
<i>Direct</i>	1,442	653	463	16,146
<i>Indirect</i>	402	204	113	1,870
<i>Induced</i>	198	64	37	467
Total	2,042	921	614	18,483

Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Table A3.22: Regional Contributions from Secondary Sectors in Halton Region

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Regional Contributions from Secondary Sectors				
Burlington				
<i>Direct</i>	401	151	85	922
<i>Indirect</i>	87	35	24	305
<i>Induced</i>	34	44	6.5	157
Total	521	230	115	1,384
Halton Hills				
<i>Direct</i>	394	137	77	847
<i>Indirect</i>	86	33	22	286
<i>Induced</i>	31	40	5.9	140
Total	512	210	105	1,273
Milton				
<i>Direct</i>	577	214	120	1,307
<i>Indirect</i>	126	50	34	434
<i>Induced</i>	48	62	9.2	221
Total	751	326	162	1,962
Grand Total (Halton)				
<i>Direct</i>	1,372	502	281	3,076
<i>Indirect</i>	299	118	80	1,025
<i>Induced</i>	113	146	22	518
Total	1,784	767	383	4,619





Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Appendix A.3 Detailed Economic Contribution Results

Halton Region





Table A3.23: Province-wide Contributions from Primary Sectors in Halton Region

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
	Province-wide Contributions from Primary Sectors			
Burlington				
<i>Direct</i>	720	326	235	8,188
<i>Indirect</i>	386	188	108	2,012
<i>Induced</i>	242	141	65	1,310
Total	1,348	656	408	11,510
Halton Hills				
<i>Direct</i>	259	117	79	2,747
<i>Indirect</i>	139	68	39	732
<i>Induced</i>	83	48	22	456
Total	481	233	140	3,936
Milton				
<i>Direct</i>	463	210	150	5,211
<i>Indirect</i>	248	120	69	1,274
<i>Induced</i>	154	90	41	837
Total	865	420	260	7,322
Grand Total (Halton)				
<i>Direct</i>	1,442	653	463	16,146
<i>Indirect</i>	773	377	215	4,019
<i>Induced</i>	479	279	129	2,603
Total	2,694	1,309	807	22,769

Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Table A3.24: Province-wide Contributions from Secondary Sectors in Halton Region

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
	Province-wide Contributions from Secondary Sectors			
Burlington				
<i>Direct</i>	401	151	85	922
<i>Indirect</i>	186	78	49	660
<i>Induced</i>	92	54	25	435
Total	679	283	158	2,017
Halton Hills				
<i>Direct</i>	394	137	77	847
<i>Indirect</i>	186	75	48	637
<i>Induced</i>	85	50	23	403
Total	666	262	148	1,887
Milton				
<i>Direct</i>	577	214	120	1,307
<i>Indirect</i>	270	111	70	947
<i>Induced</i>	131	76	35	618
Total	978	401	225	2,871
Grand Total (Halton)				
<i>Direct</i>	1,372	502	281	3,076
<i>Indirect</i>	642	264	167	2,244
<i>Induced</i>	308	180	83	1,456
Total	2,322	947	531	6,776

Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Appendix A.3 Detailed Economic Contribution Results





Hamilton

The City of Hamilton is located in the southwestern region of the GGH, and has a diverse regional economy. Hamilton has a significant overlap with the Greenbelt, and primary and secondary Greenbelt sectors make up a large contribution to the regional economy. As displayed in **Table A3.25**, results suggest that on an annual basis, activities in the primary sectors supported by the Greenbelt contribute an estimated total of \$3.5 billion in gross output, \$1.5 billion in GDP, \$1.0 billion in labour income, and sustain approximately 31,912 FTEs at direct, indirect, and induced levels in the regional economy of Hamilton.

Further, the regional economic contribution of activities in the identified secondary sectors supported by the Greenbelt is provided in **Table A3.25**. Secondary sectors contribute an estimated total of \$3.9 billion in gross output, \$1.5 billion in GDP, \$745 million in labour income, and sustain approximately 9,147 FTEs at direct, indirect and induced levels in the regional economy. Further details regarding primary and secondary sector contributions at the provincial level are provided in **Table A3.27**.

Tax contributions from primary and secondary sector activities in Hamilton are summarized in **Table A3.26** below. Results suggest that activities in primary Greenbelt sectors in Hamilton contribute \$1.1 billion in local, provincial, and federal taxes. Additionally, activities from secondary sectors in the region contribute a total of \$1.1 billion in total taxes.

Table A3.25: Regional Contributions from Primary and Secondary Sectors in Hamilton

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Regional Contributions from Primary Sectors in Hamilton				
Primary Sectors				
<i>Direct</i>	2,524	1,138	796	27,995
<i>Indirect</i>	647	308	171	3,091
<i>Induced</i>	303	90	52	825
Total	3,473	1,536	1,019	31,912
Regional Contributions from Secondary Sectors in Hamilton				
Secondary Sectors				
<i>Direct</i>	3,112	1,004	564	6,180
<i>Indirect</i>	626	201	147	2,025
<i>Induced</i>	196	281	34	942
Total	3,933	1,486	745	9,147

Figures for wages, GDP and output are in millions and reported in constant 2022 \$.

Notes: Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Table A3.26: Tax Contributions in Hamilton

Government Revenue Contributions (\$ million)		
	Primary Sectors	Secondary Sectors
<i>Federal</i>		
Taxes on Products	51	31
Taxes on Production	1.9	1.0
Corporate Income Tax	150	132
Personal Income Tax	416	543
<i>Provincial</i>		
Taxes on Products	80	50
Taxes on Production	25	15
Corporate Income Tax	113	102
Personal Income Tax	140	179
<i>Local</i>		
Taxes on Products	1.8	1.1
Taxes on Production	85	54
Total	1064	1109

Figures for wages, GDP and output are in millions and reported in constant 2022 \$.





Notes: Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Appendix A.3 Detailed Economic Contribution Results

Hamilton

Table A3.27: Province-wide Contributions from Primary and Secondary Sectors in Hamilton

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Province-wide Contributions from Primary Sectors in Hamilton				
Primary Sectors				
<i>Direct</i>	2,524	1,138	796	27,995
<i>Indirect</i>	1,349	655	371	6,967
<i>Induced</i>	826	481	222	4,523
Total	4,699	2,274	1,388	39,486

Province-wide Contributions from Secondary Sectors in Hamilton				
Secondary Sectors				
<i>Direct</i>	3,112	1,004	564	6,180
<i>Indirect</i>	1,477	582	369	4,906
<i>Induced</i>	632	369	171	2,989
Total	5,220	1,955	1,103	14,074

Figures for wages, GDP and output are in millions and reported in constant 2022 \$.

Notes: Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Appendix A.3 Detailed Economic Contribution Results





Niagara Region

Several CSDs in the Niagara region overlap with the Greenbelt. Primary sector contributions are estimated for the CSDs of Grimsby, Lincoln, Niagara-on-the-Lake, Pelham, St. Catharines, and Thorold. As displayed in **Table A3.28**, results suggest that on an annual basis, activities in the primary sectors supported by the Greenbelt contribute an estimated total of \$2.4 billion in gross output, \$1.1 billion in GDP, \$662 million in labour income, and sustain approximately 21,263 FTEs at direct, indirect, and induced levels in the Niagara Region. These results are displayed by CSD in **Table A3.30**.

Further, the regional economic contribution of activities secondary sectors are provided for a subset of CSDs in **Table A3.31** (including Grimsby, Lincoln, Niagara-on-the-Lake, and Pelham). Secondary sectors contribute an estimated total of \$456 million in gross output, \$206 million in GDP, \$100 million in labour income, and sustain approximately 1,236 FTEs at direct, indirect and induced levels in the regional economy. Further details regarding contributions by CSD at the provincial level are provided in **Table A3.32** and **A3.33**.

Tax contributions from primary and secondary sector activities in Niagara are summarized in **Table A3.29** below. Results suggest that activities in primary Greenbelt sectors in Niagara region contribute \$458 million in local, provincial, and federal taxes. Additionally, activities from secondary sectors in the region contribute a total of \$85 million in total taxes.

Table A3.28: Regional Contributions from Primary and Secondary Sectors in Niagara Region

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Regional Contributions from Primary Sectors in Niagara Region				
Primary Sectors				
<i>Direct</i>	1,827	819	536	18,896
<i>Indirect</i>	421	183	97	1,864
<i>Induced</i>	184	104	29	503
Total	2,432	1,107	662	21,263
Regional Contributions from Secondary Sectors in Niagara Region				
Secondary Sectors				
<i>Direct</i>	367	142	79	859
<i>Indirect</i>	65	24	17	244
<i>Induced</i>	24	39	4.1	133
Total	456	206	100	1,236

Figures for wages, GDP and output are in millions and reported in constant 2022 \$.

Notes: Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Table A3.29: Tax Contributions in Niagara Region

Government Revenue Contributions (\$ million)		
	Primary Sectors	Secondary Sectors
<i>Federal</i>		
Taxes on Products	34	4.3
Taxes on Production	1.4	0.2
Corporate Income Tax	55	10
Personal Income Tax	142	34
<i>Provincial</i>		
Taxes on Products	53	6.7
Taxes on Production	18	2.0
Corporate Income Tax	43	7.6
Personal Income Tax	48	14
<i>Local</i>		
Taxes on Products	1.2	0.1
Taxes on Production	62	6.8
Total	458	85

Figures for wages, GDP and output are in millions and reported in constant 2022 \$.





Notes: \$. Numbers may not add up due to rounding.





Sources: Statistics Canada and EY analysis.

Appendix A.3 Detailed Economic Contribution Results

Niagara Region

Table A3.30: Regional Contributions from Primary Sector in Niagara Region

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Regional Contributions from Primary Sectors				
Grimsby				
<i>Direct</i>	145	66	43	1,497
<i>Indirect</i>	33	14	7.3	139
<i>Induced</i>	15	8.8	2.3	41
Total	194	88	52	1,677
Lincoln				
<i>Direct</i>	227	100	55	1,883
<i>Indirect</i>	53	21	11	235
<i>Induced</i>	18	17	2.9	66
Total	298	138	68	2,183
Niagara-on-the-Lake				
<i>Direct</i>	194	87	54	1,870
<i>Indirect</i>	45	20	11	212
<i>Induced</i>	18	11	2.9	54
Total	256	118	68	2,136
Pelham				
<i>Direct</i>	126	57	32	1,084
<i>Indirect</i>	29	12	6.6	141
<i>Induced</i>	11	8.2	1.7	36
Total	166	77	41	1,261
St. Catharines				
<i>Direct</i>	968	435	298	10,628
<i>Indirect</i>	223	99	52	968
<i>Induced</i>	103	52	16	262
Total	1,294	586	367	11,858

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Regional Contributions from Primary Sectors (Cont.)				
Thorold				
<i>Direct</i>	167	75	54	1,934
<i>Indirect</i>	38	18	9.5	170
<i>Induced</i>	19	7.9	2.9	44
Total	224	101	66	2,148
Grand Total (Niagara)				
<i>Direct</i>	1,827	819	536	18,896
<i>Indirect</i>	421	183	97	1,864
<i>Induced</i>	184	104	29	503
Total	2,432	1,107	662	21,263





Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Appendix A.3 Detailed Economic Contribution Results

Niagara Region





Table A3.31: Regional Contributions from Secondary Sectors in Niagara Region

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Regional Contributions from Secondary Sectors				
Grimsby				
<i>Direct</i>	109	43	24	260
<i>Indirect</i>	19	7.3	5.0	72
<i>Induced</i>	7.4	12	1.3	40
Total	135	63	30	373
Lincoln				
<i>Direct</i>	142	53	30	322
<i>Indirect</i>	26	9.3	6.5	94
<i>Induced</i>	9.1	15	1.5	50
Total	177	77	37	466
Niagara-on-the-Lake				
<i>Direct</i>	67	27	15	162
<i>Indirect</i>	12	4.6	3.1	45
<i>Induced</i>	4.6	7.4	0.8	25
Total	84	39	19	232
Pelham				
<i>Direct</i>	48	19	11	115
<i>Indirect</i>	8.3	3.2	2.2	32
<i>Induced</i>	3.3	5.3	0.6	18
Total	60	28	13	165
Grand Total (Niagara)				
<i>Direct</i>	367	142	79	859
<i>Indirect</i>	65	24	17	244
<i>Induced</i>	24	39	4.1	133
Total	456	206	100	1,236

Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Table A3.32: Province-wide Contributions from Secondary Sectors in Niagara Region

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Province-wide Contributions from Secondary Sectors				
Grimsby				
<i>Direct</i>	109	43	24	260
<i>Indirect</i>	50	21	13	181
<i>Induced</i>	26	15	7.0	123
Total	185	80	45	564
Lincoln				
<i>Direct</i>	142	53	30	322
<i>Indirect</i>	66	27	17	233
<i>Induced</i>	32	19	8.7	152
Total	241	99	56	707
Niagara-on-the-Lake				
<i>Direct</i>	67	27	15	162
<i>Indirect</i>	31	13	8.3	112
<i>Induced</i>	16	9.4	4.3	76
Total	115	49	28	350
Pelham				
<i>Direct</i>	48	19	11	115
<i>Indirect</i>	22	9.4	5.9	80
<i>Induced</i>	11	6.7	3.1	54
Total	81	35	20	249
Grand Total (Niagara)				
<i>Direct</i>	367	142	79	859
<i>Indirect</i>	169	71	45	606
<i>Induced</i>	86	50	23	405
Total	622	264	147	1,870





Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.





Sources: Statistics Canada and EY analysis.

Appendix A.3 Detailed Economic Contribution Results

Niagara Region

Table A3.33: Province-wide Contributions from Primary Sector in Niagara Region

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Province-wide Contributions from Primary Sectors				
Grimsby				
<i>Direct</i>	145	66	43	1,497
<i>Indirect</i>	76	36	20	378
<i>Induced</i>	45	26	12	250
Total	266	128	75	2,125
Lincoln				
<i>Direct</i>	227	100	55	1,883
<i>Indirect</i>	119	58	31	608
<i>Induced</i>	61	35	16	356
Total	406	193	102	2,847
Niagara-on-the-Lake				
<i>Direct</i>	194	87	54	1,870
<i>Indirect</i>	103	50	28	536
<i>Induced</i>	58	34	16	326
Total	354	171	98	2,733
Pelham				
<i>Direct</i>	126	57	32	1,084
<i>Indirect</i>	67	33	18	350
<i>Induced</i>	35	21	9.5	203
Total	228	110	60	1,637
St. Catharines				
<i>Direct</i>	968	435	298	10,628
<i>Indirect</i>	514	247	138	2,592
<i>Induced</i>	310	181	83	1,718
Total	1,792	863	519	14,938

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Province-wide Contributions from Primary Sectors (Cont.)				
Thorold				
<i>Direct</i>	167	75	54	1,934
<i>Indirect</i>	89	43	24	452
<i>Induced</i>	56	32	15	304
Total	311	150	93	2,690
Grand Total (Niagara)				
<i>Direct</i>	1,827	819	536	18,896
<i>Indirect</i>	967	468	259	4,917
<i>Induced</i>	564	328	151	3,158
Total	3,359	1,615	947	26,970

Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Appendix A.3 Detailed Economic Contribution Results

Northumberland County





Located east of Toronto, Northumberland County comprises several CSDs that overlap with the Greenbelt. The regional economy has strengths in advanced manufacturing, agriculture and food processing, and tourism, among others.

Primary sector contributions for Northumberland County are estimated for the Alnwick/Haldimand and Hamilton Township CSDs. As displayed in **Table A3.34**, results suggest that on an annual basis, activities in the primary sectors supported by the Greenbelt contribute an estimated total of \$149 million in gross output, \$64 million in GDP, \$38 million in labour income, and sustain approximately 1,194 FTEs at direct, indirect, and induced levels in Northumberland County. Further details regarding the regional and provincial economic contribution of primary sectors in each CSD in Northumberland are provided in **Table A3.36** and **A3.37**.

Further, the regional economic contribution of activities in the identified secondary sectors supported by the Greenbelt are provided in **Table A3.35**. Secondary sector contributions have been estimated for the Hamilton Township CSD. Secondary sectors contribute an estimated total of \$33 million in gross output, \$14 million in GDP, \$6.8 million in labour income, and sustain approximately 89 FTEs at direct, indirect and induced levels in the regional economy. Further details regarding contributions by CSD at the provincial level are provided in **Table A3.38**.

Tax contributions from primary and secondary sector activities in Northumberland County are summarized in **Table A3.39** below. Results suggest that activities in primary Greenbelt sectors in Northumberland contribute \$18 million in local, provincial, and federal taxes. Additionally, activities from secondary sectors in the region contribute a total of \$1.3 million in total taxes.

Table A3.34: Regional Contributions from Primary Sectors in Northumberland County





Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Regional Contributions from Primary Sectors in Northumberland County				
Primary Sectors				
<i>Direct</i>	110	49	30	1,010
<i>Indirect</i>	29	12	6.8	141
<i>Induced</i>	10	2.4	1.7	42
Total	149	64	38	1,194

Figures for wages, GDP and output are in millions and reported in constant 2022 \$.

Notes: Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Table A3.35: Regional Contributions from Secondary Sectors in Northumberland County

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Regional Contributions from Secondary Sectors in Northumberland County				
Secondary Sectors				
<i>Direct</i>	25	9.2	5.1	56
<i>Indirect</i>	6.0	2.0	1.3	21
<i>Induced</i>	1.7	2.6	0.3	12
Total	33	14	6.8	89

Figures for wages, GDP and output are in millions and reported in constant 2022 \$.





Notes: Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Appendix A.3 Detailed Economic Contribution Results

Northumberland County





Table A3.36: Regional Contributions from Primary Sector in Northumberland County

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Regional Contributions from Primary Sectors				
Alnwick/Haldimand				
Direct	49	22	13	447
Indirect	13	5.7	3.1	66
Induced	4.5	1.0	0.7	18
Total	67	29	17	532
Hamilton Township				
Direct	60	27	17	563
Indirect	16	6.7	3.6	75
Induced	5.9	1.3	1.0	24
Total	82	35	21	662
Grand Total (Northumberland)				
<i>Direct</i>	110	49	30	1,010
<i>Indirect</i>	29	12	6.8	141
<i>Induced</i>	10	2.4	1.7	42
Total	149	64	38	1,194

Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Table A3.37: Province-wide Contributions from Primary Sector in Northumberland County

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Province-wide Contributions from Primary Sectors				
Alnwick/Haldimand				
Direct	49	22	13	447
Indirect	26	13	7.5	144
Induced	14	8.4	3.9	81
Total	90	44	25	673
Hamilton Township				
Direct	60	27	17	563
Indirect	32	16	8.8	169
Induced	18	10	4.8	101
Total	110	53	30	832
Grand Total (Northumberland)				
<i>Direct</i>	110	49	30	1,010
<i>Indirect</i>	58	29	16	313
<i>Induced</i>	32	19	8.7	182
Total	200	97	55	1,505





Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Appendix A.3 Detailed Economic Contribution Results

Northumberland County

Table A3.38: Province-wide Contributions from Secondary Sector in Northumberland County

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Province-wide Contributions from Secondary Sectors				
Secondary Sectors				
<i>Direct</i>	25	9.2	5.1	56
<i>Indirect</i>	12	4.8	3.0	41
<i>Induced</i>	5.6	3.3	1.5	27
Total	42	17	9.7	123

Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Table A3.39: Tax Contributions in Northumberland County

Government Revenue Contributions (\$ million)		
	Primary Sectors	Secondary Sectors
<i>Federal</i>		
Taxes on Products	2.1	0.3
Taxes on Production	0.1	0.0
Corporate Income Tax	1.6	0.0
Personal Income Tax	3.7	0.0
<i>Provincial</i>		
Taxes on Products	3.2	0.4
Taxes on Production	1.1	0.1
Corporate Income Tax	1.2	0.0
Personal Income Tax	1.2	0.0
<i>Local</i>		
Taxes on Products	0.1	0.0
Taxes on Production	3.7	0.5
Total	18	1.3

Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Appendix A.3 Detailed Economic Contribution Results

Peel Region





Making part of the Greater Toronto Area, the Peel region economy is diverse and made up of three lower-tier municipalities. As seen in the geospatial analysis, of all CSDs in the Region of Peel, Caledon has a high degree of overlap with the Greenbelt, thus the analysis is restricted to this CSD. As displayed in **Table A3.40**, results suggest that on an annual basis, activities in the primary sectors supported by the Greenbelt contribute an estimated total of \$413 million in gross output, \$186 million in GDP, \$120 million in labour income, and sustain approximately 3,454 FTEs at direct, indirect, and induced levels in the Region of Peel.

Secondary sectors contribute an estimated total of \$573 million in gross output, \$243 million in GDP, \$124 million in labour income, and sustain approximately 1,477 FTEs at direct, indirect and induced levels in the regional economy.

The provincial economic contributions from primary and secondary sectors in the Region of Peel are provided in **Table A3.42**.

Tax contributions from primary and secondary sector activities in the Region of Peel are summarized in **Table A3.41** below. Results suggest that activities in primary Greenbelt sectors in Peel Region contribute \$73 million in local, provincial, and federal taxes. Additionally, activities from secondary sectors in the region contribute a total of \$98 million in total taxes.

Table A3.40: Regional Contributions from Primary and Secondary Sectors in Peel Region

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Regional Contributions from Primary Sectors in Peel Region				
Caledon				
<i>Direct</i>	283	128	86	2,950
<i>Indirect</i>	87	44	25	396
<i>Induced</i>	43	14	8.5	108
Total	413	186	120	3,454
Regional Contributions from Secondary Sectors in Peel Region				
Caledon				
<i>Direct</i>	426	154	86	943
<i>Indirect</i>	106	42	29	359
<i>Induced</i>	41	46	8.5	174
Total	573	243	124	1,477

Figures for wages, GDP and output are in millions and reported in constant 2022 \$.

Notes: Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Table A3.41: Tax Contributions in Peel Region

Government Revenue Contributions (\$ million)		
	Primary Sectors	Secondary Sectors
<i>Federal</i>		
Taxes on Products	5.6	4.7
Taxes on Production	0.2	0.2
Corporate Income Tax	8.5	12
Personal Income Tax	22.9	39.3
<i>Provincial</i>		
Taxes on Products	8.9	7.4
Taxes on Production	2.8	2.3
Corporate Income Tax	6.6	8.8
Personal Income Tax	7.7	15.7
<i>Local</i>		
Taxes on Products	0.2	0.2
Taxes on Production	9.7	7.6
Total	73	98

Figures for wages, GDP and output are in millions and reported in constant 2022





Notes: \$. Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Appendix A.3 Detailed Economic Contribution Results

Peel Region

Table A3.42: Province-wide Contributions from Primary and Secondary Sector in Peel Region

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Province-wide Contributions from Primary Sectors in Peel Region				
Caledon				
<i>Direct</i>	283	128	86	2,950
<i>Indirect</i>	151	74	42	796
<i>Induced</i>	90	53	24	496
Total	525	255	153	4,243
Province-wide Contributions from Secondary Sectors in Peel Region				
Caledon				
<i>Direct</i>	426	154	86	943
<i>Indirect</i>	199	82	52	693
<i>Induced</i>	95	55	26	448
Total	719	291	164	2,084

Figures for wages, GDP and output are in millions and reported in constant 2022 \$.

Notes: Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Appendix A.3 Detailed Economic Contribution Results





Peterborough County

The southwestern end of the Peterborough County overlaps with the Greenbelt, and hence the CSD of Cavan Monaghan is included in this analysis. The regional and provincial contribution analysis is restricted to this CSD, and results are summarized for primary sectors in **Table A3.43** below.

Results suggest that on an annual basis, activities in the primary sectors supported by the Greenbelt contribute an estimated total of \$54 million in gross output, \$24 million in GDP, \$14 million in labour income, and sustain approximately 407 FTEs at direct, indirect, and induced levels in Peterborough.

Tax contributions from primary sector activities in Peterborough are summarized in **Table A3.44**. Results suggest that activities in primary Greenbelt sectors in Peterborough contribute \$9.3 million in local, provincial, and federal taxes.

Table A3.43: Regional and Province-wide Contributions from Primary Sectors in Peterborough County

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Regional Contributions from Primary Sectors in Peterborough County				
Cavan Monaghan				
<i>Direct</i>	39	18	10	335
<i>Indirect</i>	10	4.9	2.6	55
<i>Induced</i>	4.4	1.0	0.8	17
Total	54	24	14	407
Province-wide Contributions from Primary Sectors in Peterborough County				
Cavan Monaghan				
<i>Direct</i>	39	18	11	343
<i>Indirect</i>	20	9.7	5.4	103
<i>Induced</i>	11	6.3	3.0	66
Total	70	34	19	512

Figures for wages, GDP and output are in millions and reported in constant 2022 \$.

Notes: Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Table A3.44: Tax Contributions in Peterborough County

Government Revenue Contributions (\$, million)	
	Primary Sectors
<i>Federal</i>	
Taxes on Products	0.6
Taxes on Production	0.0
Corporate Income Tax	1.3
Personal Income Tax	2.7
<i>Provincial</i>	
Taxes on Products	1.0
Taxes on Production	0.4
Corporate Income Tax	1.0
Personal Income Tax	0.9
<i>Local</i>	
Taxes on Products	0.0
Taxes on Production	1.3
Total	9.3

Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.

Notes: Statistics Canada and EY analysis.

Sources: Statistics Canada and EY analysis.

Appendix A.3 Detailed Economic Contribution Results





Simcoe County

Similar to Peterborough County, one CSD in Simcoe County (Clearview) overlaps with the Greenbelt. Results for Simcoe County are thus restricted to the regional economy of Clearview. The regional and provincial contribution analysis is restricted to this CSD, and results are summarized for primary sectors in **Table A3.45**.

Results suggest that on an annual basis, activities in the primary sectors supported by the Greenbelt contribute an estimated total of \$155 million in gross output, \$67 million in GDP, \$41 million in labour income, and sustain approximately 1,283 FTEs at direct, indirect, and induced levels in Simcoe County.

Tax contributions from primary sector activities in Simcoe County are summarized in **Table A3.46**. Results suggest that activities in primary Greenbelt sectors in Simcoe County contribute \$29 million in local, provincial, and federal taxes.

Table A3.45: Regional and Province-wide Contributions from Primary Sectors in Simcoe County

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Regional Contributions from Primary Sectors in Simcoe County				
Clearview				
<i>Direct</i>	115	52	32	1,104
<i>Indirect</i>	29	13	7.0	142
<i>Induced</i>	11	2.8	1.9	37
Total	155	67	41	1,283
Province-wide Contributions from Primary Sectors in Simcoe County				
Clearview				
<i>Direct</i>	115	52	32	1,104
<i>Indirect</i>	61	30	17	322
<i>Induced</i>	35	20	9.3	194
Total	210	102	58	1,620

Figures for wages, GDP and output are in millions and reported in constant 2022 \$.

Notes: Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Table A3.46: Tax Contributions in Simcoe County

Government Revenue Contributions (\$, million)	
	Primary Sectors
<i>Federal</i>	
Taxes on Products	2.2
Taxes on Production	0.1
Corporate Income Tax	3.6
Personal Income Tax	8.8
<i>Provincial</i>	
Taxes on Products	3.4
Taxes on Production	1.1
Corporate Income Tax	2.8
Personal Income Tax	3.0
<i>Local</i>	
Taxes on Products	0.1
Taxes on Production	3.9
Total	29

Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.

Notes: Statistics Canada and EY analysis.

Sources: Statistics Canada and EY analysis.

Appendix A.3 Detailed Economic Contribution Results





Wellington County

The economic contribution analysis for Wellington County is restricted to the CSDs of Erin and Puslinch.

As displayed in **Table A3.47**, results suggest that on an annual basis, activities in the primary sectors supported by the Greenbelt contribute an estimated total of \$220 million in gross output, \$96 million in GDP, \$56 million in labour income, and sustain approximately 1,668 FTEs at direct, indirect, and induced levels in Wellington County. Further details regarding primary sector contributions at the regional and provincial level are provided in **Table A3.49** and **A3.50**.

Tax contributions from primary sector activities in Wellington County are summarized in **Table A3.48**. Results suggest that activities in primary Greenbelt sectors in Wellington contribute \$33 million in local, provincial, and federal taxes.

Table A3.47: Regional Contributions from Primary Sectors in Wellington County

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Regional Contributions from Primary Sectors in Wellington County				
Primary Sectors				
<i>Direct</i>	136	61	35	1,204
<i>Indirect</i>	61	28	16	339
<i>Induced</i>	23	7.0	4.7	125
Total	220	96	56	1,668

Figures for wages, GDP and output are in millions and reported in constant 2022 \$.

Notes: Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Table A3.48: Tax Contributions in Wellington County

Government Revenue Contributions (\$, million)	
	Primary Sectors
<i>Federal</i>	
Taxes on Products	2.4
Taxes on Production	0.1
Corporate Income Tax	4.4
Personal Income Tax	9.8
<i>Provincial</i>	
Taxes on Products	3.8
Taxes on Production	1.4
Corporate Income Tax	3.4
Personal Income Tax	3.3
<i>Local</i>	
Taxes on Products	0.1
Taxes on Production	4.7
Total	33

Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.

Notes:





Sources:

Statistics Canada and EY analysis.

Appendix A.3 Detailed Economic Contribution Results

Wellington County





Table A3.49: Regional Contributions from Primary Sector in Wellington County

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Regional Contributions from Primary Sectors				
Erin				
Direct	90	40	22	738
Indirect	40	18	10	224
Induced	14	4.3	3.0	80
Total	144	63	35	1,041
Puslinch				
Direct	46	21	13	466
Indirect	21	10	5.4	115
Induced	8	2.7	1.8	45
Total	75	33	21	627
Grand Total (Wellington)				
Direct	136	61	35	1,204
Indirect	61	28	16	339
Induced	23	7.0	4.7	125
Total	220	96	56	1,668

Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Table A3.50: Province-wide Contributions from Primary Sector in Wellington County

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Province-wide Contributions from Primary Sectors				
Erin				
Direct	90	40	22	738
Indirect	48	24	13	251
Induced	24	14	6.6	142
Total	162	78	42	1,131
Puslinch				
Direct	46	21	13	466
Indirect	25	12	6.7	127
Induced	14	8.2	3.8	80
Total	85	41	24	673
Grand Total (Wellington)				
Direct	136	61	35	1,204
Indirect	72	35	20	378
Induced	39	22	10	221
Total	247	119	65	1,803

Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Appendix A.3 Detailed Economic Contribution Results

York Region

Located in the heart of the GGH and in close proximity to the City of Toronto, York region has a diverse economy. All CSDs in the York Region overlap significantly with the Greenbelt, and consolidated results for the regional contributions are displayed in **Table A3.51** below.

Results suggest that on an annual basis, activities in the primary sectors supported by the Greenbelt contribute an estimated total of \$5.7 billion in gross output, \$2.6 billion in GDP, \$1.8 billion in labour income, and sustain approximately 53,358 FTEs at direct, indirect, and induced levels in the York Region. Further details regarding primary sector contributions at the regional and provincial level are provided for each CSD in **Table A3.53** and **A3.55**.

Additionally, the regional economic contribution of activities in the identified secondary sectors supported by the Greenbelt is provided in **Table A3.54**. Secondary sectors contribute an estimated total of \$1.3 billion in gross output, \$577 million in GDP, \$291 million in labour income, and sustain approximately 3,429 FTEs at direct, indirect and induced levels in the regional economy. Province-wide contributions for secondary sectors in each CSD are provided in **Table A3.56**.

Tax contributions from primary and secondary sector activities in the York Region are summarized in **Table A3.52** below. Results suggest that activities in primary Greenbelt sectors in York Region contribute \$1 billion in local, provincial, and federal taxes. Additionally, activities from secondary sectors in the region contribute a total of \$209 million in total taxes.

Table A3.51: Regional Contributions from Primary and Secondary Sectors in York Region

Economic Impact	York Region			
	Output (\$ million)	GDP (\$ million)	Wages (\$ million)	FTEs (Person-Years)
Regional Contributions from Primary Sectors in York County				
Primary Sectors				
<i>Direct</i>	3,930	1,797	1,309	45,518
<i>Indirect</i>	1,195	610	346	6,038
<i>Induced</i>	606	207	119	1,802
Total	5,731	2,615	1,775	53,358
Regional Contributions from Secondary Sectors in York County				
Grand Total (Northern Bruce Peninsula)				
<i>Direct</i>	964	378	211	2,286
<i>Indirect</i>	207	89	61	757
<i>Induced</i>	91	110	19	385
Total	1,262	577	291	3,429

Figures for wages, GDP and output are in millions and reported in constant 2022 \$.

Notes: Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Table A3.52: Tax Contributions in York Region

Government Revenue Contributions (\$ million)	York Region	
	Primary Sectors	Secondary Sectors
<i>Federal</i>		
Taxes on Products	82	11
Taxes on Production	2.9	0.4
Corporate Income Tax	112	26
Personal Income Tax	338	90
<i>Provincial</i>		
Taxes on Products	129	18
Taxes on Production	38	5.4
Corporate Income Tax	86	20
Personal Income Tax	114	20
<i>Local</i>		
Taxes on Products	2.9	0.4
Taxes on Production	130	18
Total	1,035	209

Figures for wages, GDP and output are in millions and reported in constant 2022 \$.





Notes: Numbers may not add up due to rounding.





Sources: Statistics Canada and EY analysis.

Appendix A.3 Detailed Economic Contribution Results

York Region

Table A3.53: Regional Contributions from Primary Sector in York Region

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Regional Contributions from Primary Sectors				
Richmond Hill				
<i>Direct</i>	650	298	223	7,825
<i>Indirect</i>	200	103	58	1,017
<i>Induced</i>	103	36	20	306
Total	954	436	302	9,148
Markham				
<i>Direct</i>	1,296	595	449	15,805
<i>Indirect</i>	396	201	113	1,947
<i>Induced</i>	209	73	41	611
Total	1,902	868	603	18,363
Vaughan				
<i>Direct</i>	1,038	476	351	12,114
<i>Indirect</i>	318	164	94	1,645
<i>Induced</i>	162	56	32	488
Total	1,518	696	476	14,248
Georgina				
<i>Direct</i>	202	91	60	2,087
<i>Indirect</i>	60	30	17	295
<i>Induced</i>	28	8.9	5.5	82
Total	290	130	83	2,464
East Gwillimbury				
<i>Direct</i>	151	68	45	1,547
<i>Indirect</i>	44	22	13	217
<i>Induced</i>	21	6.6	4.1	61
Total	215	97	62	1,825

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Regional Contributions from Primary Sectors (cont.)				
King				
<i>Direct</i>	133	60	36	1,190
<i>Indirect</i>	37	18	10	176
<i>Induced</i>	17	4.8	3.2	49
Total	187	83	49	1,415
Aurora				
<i>Direct</i>	236	108	77	2,641
<i>Indirect</i>	72	38	22	386
<i>Induced</i>	35	12	7.0	109
Total	343	157	106	3,136
Whitchurch-Stouffville				
<i>Direct</i>	223	101	69	2,310
<i>Indirect</i>	67	35	20	354
<i>Induced</i>	31	10	6.2	97
Total	322	146	95	2,761
Grand Total (York)				
<i>Direct</i>	3,930	1,797	1,309	45,518
<i>Indirect</i>	1,195	610	346	6,038
<i>Induced</i>	606	207	119	1,802
Total	5,731	2,615	1,775	53,358





Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.





Sources: Statistics Canada and EY analysis.

Appendix A.3 Detailed Economic Contribution Results

York Region

Table A3.54: Regional Contributions from Secondary Sector in York Region

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Regional Contributions from Secondary Sectors				
Aurora				
<i>Direct</i>	153	64	35	384
<i>Indirect</i>	33	15	10	126
<i>Induced</i>	15	19	3.2	67
Total	202	97	49	577
East Gwillimbury				
<i>Direct</i>	97	35	20	214
<i>Indirect</i>	21	8.4	5.9	72
<i>Induced</i>	8.5	10	1.7	34
Total	127	54	27	320
King				
<i>Direct</i>	137	55	31	332
<i>Indirect</i>	30	13	8.8	110
<i>Induced</i>	13	16	2.7	56
Total	180	84	42	498
Richmond Hill				
<i>Direct</i>	415	161	90	978
<i>Indirect</i>	89	38	26	324
<i>Induced</i>	39	47	8.0	164
Total	543	247	124	1,466

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Regional Contributions from Secondary Sectors (cont.)				
Whitchurch-Stouffville				
<i>Direct</i>	161	63	35	378
<i>Indirect</i>	34	15	10	125
<i>Induced</i>	15	18	3.1	64
Total	210	96	48	567
Grand Total (York)				
<i>Direct</i>	964	378	211	2,286
<i>Indirect</i>	207	89	61	757
<i>Induced</i>	91	110	19	385
Total	1,262	577	291	3,429





Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.





Sources: Statistics Canada and EY analysis.

Appendix A.3 Detailed Economic Contribution Results

York Region

Table A3.55: Province-wide Contributions from Primary Sector in York Region

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Province-wide Contributions from Primary Sectors				
Richmond Hill				
<i>Direct</i>	650	298	223	7,825
<i>Indirect</i>	347	168	97	1,786
<i>Induced</i>	227	132	61	1,218
Total	1,225	598	380	10,828
Markham				
<i>Direct</i>	1,296	595	449	15,805
<i>Indirect</i>	688	330	188	3,465
<i>Induced</i>	455	265	122	2,438
Total	2,438	1,190	759	21,708
Vaughan				
<i>Direct</i>	1,038	476	351	12,114
<i>Indirect</i>	554	270	156	2,883
<i>Induced</i>	359	209	96	1,922
Total	1,950	955	602	16,920
Georgina				
<i>Direct</i>	202	91	60	2,087
<i>Indirect</i>	108	53	30	568
<i>Induced</i>	63	37	17	352
Total	374	181	107	3,006
East Gwillimbury				
<i>Direct</i>	151	68	45	1,547
<i>Indirect</i>	80	39	22	419
<i>Induced</i>	47	28	13	261
Total	278	135	80	2,227

Economic Impact	 Output (\$ million)	 GDP (\$ million)	 Wages (\$ million)	 FTEs (Person-Years)
Province-wide Contributions from Primary Sectors (cont.)				
King				
<i>Direct</i>	133	60	36	1,190
<i>Indirect</i>	70	35	19	367
<i>Induced</i>	39	23	10	218
Total	242	117	66	1,775
Aurora				
<i>Direct</i>	236	108	77	2,641
<i>Indirect</i>	126	62	36	675
<i>Induced</i>	80	47	21	429
Total	442	217	135	3,745
Whitchurch-Stouffville				
<i>Direct</i>	223	101	69	2,310
<i>Indirect</i>	120	59	34	640
<i>Induced</i>	72	42	19	391
Total	416	203	122	3,340
Grand Total (York)				
<i>Direct</i>	3,930	1,797	1,309	45,518
<i>Indirect</i>	2,093	1,017	582	10,801
<i>Induced</i>	1,342	782	360	7,230
Total	7,364	3,596	2,251	63,550





Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.





Sources: Statistics Canada and EY analysis.

Appendix A.3 Detailed Economic Contribution Results

York Region

Table A3.56: Province-wide Contributions from Secondary Sectors in York Region

Economic Impact	 Output (\$, million)	 GDP (\$, million)	 Wages (\$, million)	 FTEs (Person-Year)
Province-wide Contributions from Secondary Sectors				
Aurora				
<i>Direct</i>	153	64	35	384
<i>Indirect</i>	70	30	19	259
<i>Induced</i>	38	22	10	179
Total	261	116	65	822
East Gwillimbury				
<i>Direct</i>	97	35	20	214
<i>Indirect</i>	45	19	12	158
<i>Induced</i>	22	13	5.8	102
Total	164	66	37	474
King				
<i>Direct</i>	137	55	31	332
<i>Indirect</i>	63	27	17	229
<i>Induced</i>	33	19	8.9	156
Total	234	101	56	717
Richmond Hill				
<i>Direct</i>	415	161	90	978
<i>Indirect</i>	192	81	51	688
<i>Induced</i>	98	57	26	461
Total	705	299	167	2,127

Economic Impact	 Output (\$, million)	 GDP (\$, million)	 Wages (\$, million)	 FTEs (Person-Year)
Province-wide Contributions from Secondary Sectors (cont.)				
Whitchurch-Stouffville				
<i>Direct</i>	161	63	35	378
<i>Indirect</i>	74	31	20	265
<i>Induced</i>	38	22	10	179
Total	272	116	65	822
Grand Total (York)				
<i>Direct</i>	964	378	211	2,286
<i>Indirect</i>	444	188	119	1,600
<i>Induced</i>	228	133	61	1,076
Total	1,636	699	391	4,962

Notes: Figures for wages, GDP and output are in millions and reported in constant 2022 \$. Numbers may not add up due to rounding.

Sources: Statistics Canada and EY analysis.

Appendix A.4 Definitions

Terms	Definition
Direct Impact	Economic impacts generated directly by the capital and operational expenditures of the economic activity in the Greenbelt. Operational expenditure includes money spent on normal operations of the facility, including but not limited to any sourcing of materials, employee wages, contracting services for maintenance, and equipment running costs. Capital expenditure encompasses money spent on acquisition of office buildings, freight and other infrastructure costs.
Indirect Impact	Secondary economic activities that arise from business-to-business purchases required to sustain the direct activities supported by the Greenbelt. This includes the spending of suppliers who provide goods and services to Greenbelt industries—for example, agricultural input suppliers purchasing machinery parts or fertilizer, food processors hiring subcontractors for equipment maintenance, or tourism operators sourcing utilities, transportation, and professional services.
Induced Impact	Additional economic activities that arise when employees benefiting from the stimulated direct and indirect economic activities associated with the Greenbelt-supported sectors spend their increased wages and salaries on consumer goods and services. For instance, employees working at a facility, along with those employed by suppliers and service providers, may allocate a portion of their additional income to local retail stores, restaurants, and cafes. This spending will further influence the retail trade and the accommodation and food services industries.
Gross domestic product (GDP)	Total unduplicated value of the goods and services produced in the economic territory of a country or region during a given period. A valuation expressed in terms of the prices actually paid by the purchaser after all applicable taxes and subsidies.
Labour Income/Wages	Total remuneration, in cash or in kind, payable by an enterprise to an employee in return for work done by the latter during the accounting period. Compensation of employees is recorded on an accrual basis; that is, it is measured by the value of the remuneration in cash or in kind that an employee becomes entitled to receive from an employer in respect of work done during the relevant period, whether paid in advance, simultaneously or in arrears of the work itself. In productivity analysis, compensation of employees is equivalent to the cost of labour services.
Full-time equivalent employment (FTE)	The number of full-time equivalent jobs, defined as total hours worked by all employed persons divided by the average number of annual hours actually worked in full-time jobs.
Multipliers	Quantitative measure created by a particular Input-Output based economic model. It measures how a certain expenditure is expected to impact the economy.
Taxes on Products	Tax payable per unit of some good or service. The tax may be a specific amount of money per unit of quantity of a good or service (the quantity units being measured either in terms of discrete units or continuous physical variables such as volume, weight, strength, distance, time, etc.), or it may be calculated ad valorem as a specified percentage of the price per unit or value of the goods or services transacted. A tax on a product usually becomes payable when it is produced, sold or imported, but it may also become payable in other circumstances, such as when a good is exported, leased, transferred, delivered, or used for own consumption or own capital formation.
Taxes on Production	Taxes on factors of production are paid by producers and are related to operations. Such taxes are collected regardless of the volume of goods and services produced. These taxes are payable on land, fixed assets, labour, financial capital, licences and permits or certain types of activities.

Sources: Statistics Canada and EY Analysis.

Appendix A.5 Input-Output Model: Assumptions and Limitations

The following section outlines the assumptions and limitations associated with the I-O model used to perform the economic impact assessment in the Report. The I-O model is subject to limitations both in concept and implementation. Like any economic model, the I-O model is conceptually an abstraction that attempts to be complex enough to accurately capture and estimate the most significant impacts to the real-life economy caused by economic activities, yet simple enough to be analytically and intuitively meaningful.

An I-O model reflects the observed interdependency between all sectors of the economy. For Canada, Statistics Canada reports on the 236 industrial sectors in the economy: (1) how each sector relies on the other 235 sectors for inputs to their production; and (2) how each sector supplies its products and services to each of the remaining 235 sectors. While an I-O model provides a consistent and innovative way of measuring the economic effects of an economic activity, one should be aware of the assumptions and limitations of the model's underlying approach. Some of these assumptions include:

- ▶ The relationship between industry inputs and outputs is linear and fixed, meaning that a change in demand for the outputs of any industry will result in a proportional change in production.
- ▶ The model assumes constant returns to scale and cannot account for economies/diseconomies of scale or structural changes in production technologies; an assumption that does not necessarily hold in the actual economy.
- ▶ Prices are fixed in the model; thus, the model is unable to account for elasticities, (how one economic variable changes in response to another).
- ▶ I-O models are static and therefore do not consider the amount of time required for changes to happen. Changing the timeframe would not affect the magnitude of the estimates.
- ▶ There are no capacity constraints, and all industries are operating at full capacity. This implies that an increase in output results in an increase in demand for labour (rather than simply redeploying existing labour). It also implies that there is no displacement that may occur in existing industries as new projects complete.
- ▶ I-O models assume that the technology and resource mix (ratios for inputs and production) is the same for all firms within each industry, i.e., the 236 industry categories reported in Statistics Canada's input-output table. As such, the analysis describes industry average effects.
- ▶ The model assumes that the structure of the economy remains unchanged, and any structural changes in the economy since 2022 will therefore lead to changes to the multipliers, which could be implemented once Statistics Canada release updated input-output tables. As such, the further the year of analysis is away from the year of the input-output tables used, the greater the uncertainties.
- ▶ The model does not consider the economic impacts or opportunity costs associated with using resources elsewhere. Using these funds for alternative uses would generate their own economic impacts, which could potentially be larger or smaller. However, the model will not be able to capture this difference.
- ▶ Results from the I-O model should not be interpreted as causal impacts, that is, users should not take the economic impacts presented in this report at verbatim. It cannot be said with certainty that X dollars of capital or operational spending will produce X number of FTEs or have an X amount of impact on GDP.
- ▶ The model does not consider substitutions amongst inputs, and each industry in the model is regarded as having a single production process.

Per the assumptions above, the structure and limitations of I-O models lend themselves to measuring the impacts of projects that are shorter term in nature. Generally, they are used to look at shocks to the economy.

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