

Niagara District Airport
2025 – 2045 Master Plan

EXECUTIVE SUMMARY



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The Niagara District Airport 2025 – 2045 Master Plan envisions a future where tourists and business travelers arrive to the region by stepping off a flight minutes away from beautiful vineyards, historic sites, shopping, and entertainment; while Niagara residents board a flight significantly closer to home, that is destined for North American travel destinations.

Through a strategic redevelopment, Niagara District Airport (“the Airport”), aims to transform itself from a modest general aviation facility into a modern regional gateway that improves Niagara’s connectivity to and from other destinations in North America and fuels economic growth in the region.

The vision outlined in the Master Plan is about unlocking the Airport’s potential and supporting growth in one of Canada’s top tourist destinations. At completion, it will unlock over \$1 billion in economic output and bring over 7 million passengers through the Niagara region over the course of the plan.

A Region with Untapped Potential

The Master Plan began with a simple but pressing question: What role should the Airport play in Niagara’s future? For decades, the Airport has operated steadily, serving training flights, helicopter operations, maintenance shops, and private charter flights. In 2023, the Niagara District Airport Commission (“the Commission”) launched a new Strategic

Plan that made clear the need for a bolder roadmap. Avia NG Inc. was retained to prepare the first comprehensive Master Plan in over 30 years, drawing on technical analysis, community consultation, and economic forecasting to develop a plan for the Airport’s transformation. The result is an ambitious but realistic vision of what the Airport can become – an indispensable gateway connecting the Niagara region to the rest of North America.

The region has a growing population of 540,000, with over 40,000 jobs currently supported by tourism. Despite this level of activity, residents, and visitors have to travel through airports located in Hamilton, Buffalo, or Toronto to connect to markets beyond (see **Figure ES-1**). A route and catchment demand analysis using 2019 data from Market Information Data Transfer and Airports Council International estimated that Niagara generated approximately 2.1 million airline passengers. However, these figures reflect travel captured through scheduled commercial airports in Hamilton, Buffalo, and Toronto, excluding low-cost carriers. It does not explicitly quantify the magnitude of tourism-driven air travel that would materialize if direct air access were available within Niagara itself. The Niagara region welcomes roughly 13 million visitors annually, many of whom currently arrive by automobile or motor coach. Even a modest conversion of that visitor segment to air travel would significantly exceed the modelled baseline.

Tourism uplift represents a latent market that traditional aviation-demand modelling cannot easily capture because it depends on route availability, fare competitiveness, and marketing alignment with destination promoters. Experience from comparable regional airports, such as Kelowna, Charlottetown, and Thunder Bay shows that once scheduled service is introduced, visitor traffic often grows two- to three-times faster than resident demand in the first decade of operation. Applying even a conservative adjustment of 10 to 15% of Niagara’s annual visitor base to short-haul leisure markets would translate to several hundred thousand additional enplaning passengers, underscoring that the 2.1 million annual passengers should be interpreted as a floor rather than a ceiling.

The factors that limit the Airport’s capacity today, such as short runways and a small terminal, represent a clear roadmap for enhanced capabilities moving forward. By



addressing these constraints through phased investment, the Airport can transform its challenges into strengths. For instance, extending the Airport’s existing runway is not just a capital investment; it is a signal to airlines and the public that Niagara is serious about connectivity. In this way, the Master Plan reframes limitations as opportunities waiting to be unlocked.

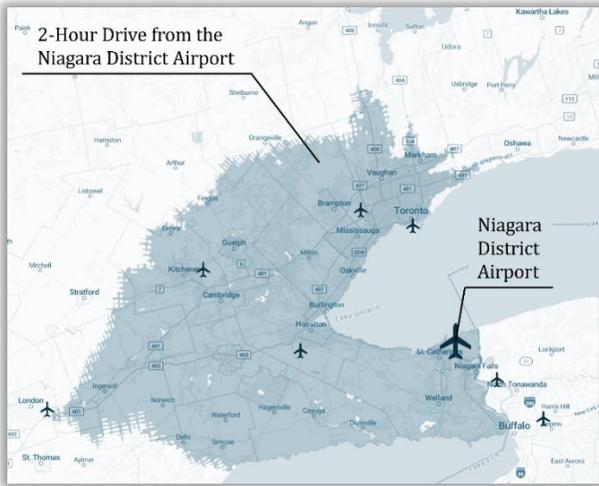


Figure ES-1 Proximity to Competing Commercial Airports

(Source: AVIA NG/DKMA Analysis)

The Airport Today

Today, the Airport sits on 362 acres of land in Niagara-on-the-Lake, surrounded by vineyards and beautiful countryside. Less than a 15-minute drive to the Niagara Falls tourism district, historical Niagara-on-the-Lake and the St. Catharines downtown core, the Airport is centrally located in the region and a short drive to all major destinations.

The Airport has three bi-directional runways – the longest at 5,000 ft. – a small air terminal building, multiple aprons, a NAV CANADA Flight Service Station, and basic support facilities. These facilities support general aviation activities such as flight training, helicopter tours, aircraft maintenance, sightseeing, and business travel. A handful of tenants, including the St. Catharines Flying Club, National Helicopters, and Allied Aviation, keep the Airport active and connected to the local community.

As constructed the Airport’s constraints are clear. The terminal is small, there are no passenger screening facilities, there are no permanent customs facilities, and the runways are too short for many commercial aircraft. For the past two decades, activity has remained steady but modest,

only recovering to pre-COVID-19 pandemic levels in 2025 (40,000+ aircraft movements).

In many ways, the Airport’s current state reflects both its resilience and its challenges. The Airport has succeeded in maintaining a consistent role in private aviation, flight training, and aircraft maintenance despite limited infrastructure, proving its operational reliability, and strategic location. However, without investment, the Airport cannot attract and sustain commercial service needed to bring visitors, jobs, and better connectivity to the region.

Opportunities and Challenges

The Airport’s strengths are compelling: a central location in Niagara, its proximity to the region’s tourist attractions, and easy access to U.S. markets. Its surrounding lands allow for measured growth, and its governance model provides stability.

But there are weaknesses: short runways, limited terminal capacity, no passenger screening or customs, and outdated support facilities. The Airport is competing with strong neighbours – Hamilton, Buffalo, and Toronto Pearson – and faces the same threats as the aviation industry worldwide: climate change, extreme weather, and economic uncertainty.

With the right investments, the Airport has the potential to:

- ➔ Attract scheduled Canadian and U.S. flights.
- ➔ Serve as a reliever airport for Pearson, offering lower costs, and faster turnarounds for low-cost carriers.
- ➔ Expand landside commercial development.
- ➔ Become a hub for advanced mobility technologies, including electric and hybrid aircraft and vertiports for eVTOLs.



Source: BETA Technologies

The Airport's future depends on turning constraints into catalysts for growth. For example, the lack of customs and security screening, while a challenge today, provides a blank canvas for the design of modern, efficient facilities tailored to future passenger needs. Similarly, while competition from nearby airports is a consideration, Niagara's unparalleled tourism draw gives it a natural advantage that those airports cannot replicate. By addressing infrastructure gaps and leaning into Niagara's unique strengths, the Airport can redefine its position in the regional aviation landscape.

A Phased Roadmap for Growth

The Master Plan sets out a carefully staged development pathway that balances ambition with realism. Growth is organised into stages each tied to demand, funding, and operational capacity and phased over the short-, medium- and long-term planning horizons.

Enabling Program Stage (2025): Upon acceptance of the Airport Master Plan and prior to entering Stage 1, management will embark on an Enabling Program Stage (EPS) to prepare the Airport for transition to Stage 1 operations. Key program elements include:

- Funding Strategy – secure resources to support preliminary and detailed design studies.
- Air Service Development Strategy and Carrier Commitment – work with airlines to obtain expressions of interest that strengthen funding applications.
- Finalize Concept of Operations – confirm how initial passenger services will be delivered and supported.
- Design and Procurement Strategy – prepare for terminal expansion and related infrastructure works.

Stage 1 (2029): Stage 1 includes infrastructure improvement projects anticipated in the short- to medium-term, with the goal of preparing the Airport for scheduled commercial air service. Predicated on the successful completion of the EPS, the following construction projects would be undertaken:

- Short-term (0–5 years): essential investments. These include expanding the existing terminal and associated parking lot, upgrading aprons, building a new Combined Services Building (CSB) to house maintenance and firefighting, making improvements to the airport's vehicle entrance, construction of new Runway End Safety Areas (RESA), servicing new commercial development areas, and acquiring strategic parcels of land.

- Medium-term (6-10 years): construction of new commercial development areas.

Stage 2 (2034): Involves additional infrastructure projects associated with improving the Airport's level-of-service. These projects are anticipated to occur over the medium- to long-term. Following a realization of initial growth and securing of adequate grant funding, the following would be initiated:

- Medium-term (6–10 years): transformational improvements. The main runway will be extended to 2,286 m (7,500 ft.) and widened, enabling narrow-body jets to operate without restrictions. A new passenger terminal will be constructed, complete with Canadian Air Transport Security Authority (CATSA) security screening and Canada Border Services Agency (CBSA) customs facilities. A parallel taxiway will be added, and the fuel farm will be expanded. Additional improvements will include a new approach lighting system, ILS and precision GNSS approaches, a new RESA for Runway 24, a new roundabout and road network improvements, and extended site servicing for continued facility development.
- Long-term (11+ years): sustained expansion and innovation. The terminal and aprons will continue to expand. Commercial development opportunities will be pursued on the airport's lands. Emerging technologies, such as electric regional aircraft, hybrid propulsion, and eVTOLs, will be integrated into operations.

In total, the capital program represents approximately \$195 million in investment. Each stage builds on the last and delivers standalone benefits, ensuring that progress is visible and measurable. Even the earliest investments, such as apron improvements and terminal expansions will improve the passenger and tenant experience immediately, while laying the groundwork for larger projects to follow.

Recommended Development Plan

Figure ES-2 illustrates how the Airport's lands will evolve to support the vision. This plan is not just a layout; it's a strategic guide that includes the runway extension, new terminal, apron expansions, commercial zones and supporting infrastructure, and demonstrates how today's modest facilities can evolve into a regional gateway.

The plan reassures the Commission, municipal councils, and residents that growth will be orderly, efficient, and strategically guided.

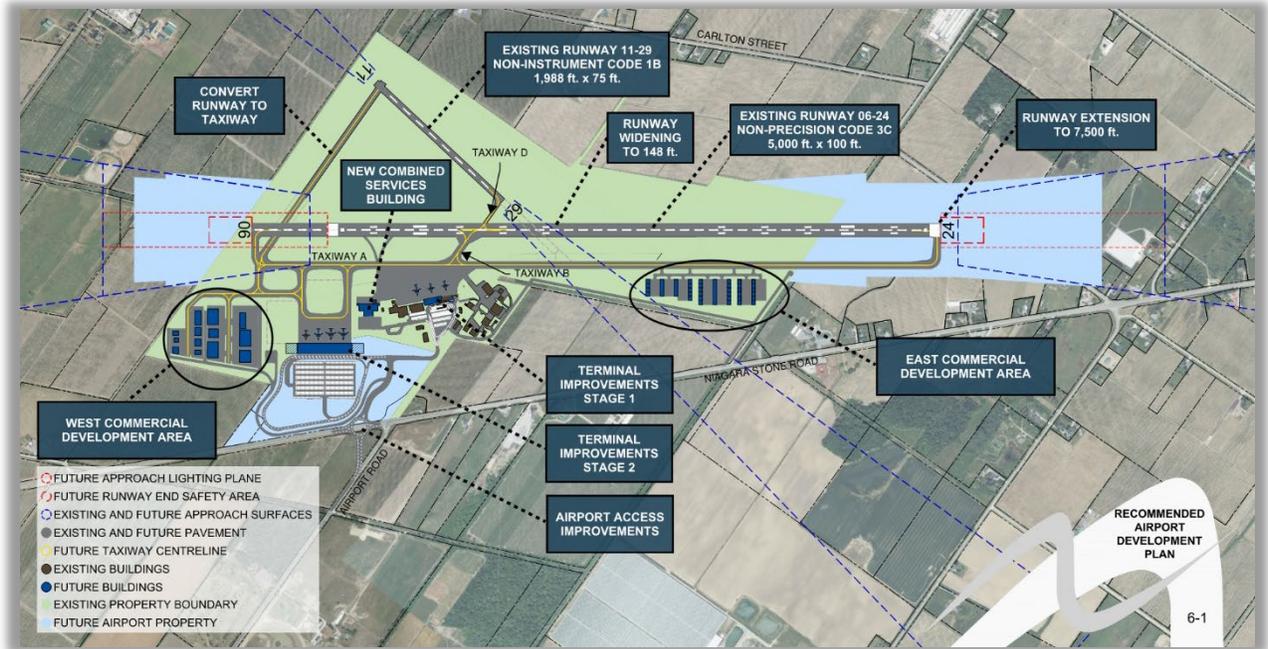


Figure ES-2 Recommended Land Use Development Plan

(Figure 6-1 from the 2025 – 2045 Airport Master Plan, Source: AVIA NG)

It represents a commitment to phasing projects in a way that balances ambition with economic stewardship. Each element shown on the plan has been sequenced to avoid overbuilding before demand materialises, while still reserving the land and corridors needed for long-term growth. This protects the Airport against piecemeal or reactive development, ensuring that every dollar invested contributes to a coherent vision.

The plan underscores that the Airport is more than its runways and terminal. By setting aside land for commercial and industrial development, integrating space for advanced mobility technologies, and improving surface access, the plan links aviation growth with broader economic development and widespread community benefits. It positions the Airport not only as a transportation hub but also as a catalyst for tourism, business investment, innovation and enhanced connectivity in the region.

The Economic Case

Airports are economic engines, and the numbers make a powerful case for investment.

In 2024, the Airport supported 119 jobs, \$9.6 million in wages, \$15.2 million in GDP, and \$32.7 million in economic output.



Figure ES-3 Cumulative Economic Impact Upon Completion

By 2045, with an expected 574,000 annual passengers and over 51,000 flights annually, the Airport is projected to support 507 jobs, \$40.3 million in wages, \$69.3 million in GDP, and \$157.6 million in output. The construction program itself will generate over 1,100 jobs and nearly \$400 million in output, with almost 90% of those benefits staying in Ontario.



Figure ES-4 Economic Contribution in 2045

These economic impacts are particularly significant when considered against the broader context of Niagara’s economy. Tourism, agriculture, and advanced manufacturing all rely on efficient connectivity to thrive. By enhancing the Airport’s role, the region strengthens the competitiveness of these industries and creates new opportunities for local workers. The Airport becomes not just a beneficiary of Niagara’s growth but an active enabler of it.

Safeguarding and Sustainability

The Master Plan recognizes that growth must be responsible. It recommends updating of Airport Zoning Regulations (AZRs) to protect airspace, modelling future noise impacts to guide compatible land use, and implementing a climate resilience plan.

Environmental stewardship is woven into the plan. Initiatives include sustainable aviation fuels, solar energy, electrification of airport vehicles, and green building design. Perhaps most exciting is the potential for a dedicated vertiport, making Niagara one of the first regions in Canada to embrace advanced air mobility.

From noise modelling to land-use planning, sustainability measures are designed to protect community quality of life while building resilience against climate risks. This proactive approach helps align the Airport with broader municipal and provincial sustainability objectives.

The Role of Effective Governance

The Airport is owned by the Town of Niagara-on-the-Lake, City of Niagara Falls, and City of St. Catharines, and is managed by a Commission with representation from the three municipalities. This governance model has served the Airport well, balancing local accountability with professional oversight. As larger infrastructure projects move forward, this model positions the Airport to access provincial and federal programs such as the Airports Capital Assistance Program (ACAP) and the National Trade Corridors Fund (NTCF), unlocking new opportunities and investments for the Niagara region.

Effective governance requires not only structure but proactive leadership. The Commission will need to continue championing the Airport, advocating with senior levels of government, engaging with airlines, and demonstrating to residents why investment is worthwhile. The Master Plan provides the roadmap, but governance will drive implementation.

Enabling Program Stage: A Bridge to the Future

A unique feature of this Master Plan is the concept of the EPS that builds upon what has already been started to further develop a concept of operations in the 2026–2028 period that balances near-term opportunities with longer-term infrastructure planning. This stage is an interim step designed to build momentum before full commercial service begins in 2029. The EPS would enable Dash 8 (Q400) turboprop operations with up to approximately 10,000 to 20,000 passengers (enplaned and deplaned) annually, focusing on charter and ad hoc traffic. It recognises limitations such as interim terminal needs, lack of CATSA screening, and parking shortages, but it offers a pragmatic way to test the market, attract airline interest, and demonstrate feasibility.

This stage is intended to generate early momentum while laying the groundwork for full commercial service commencing with Stage 1 in 2029, supported by an additional estimated \$55 million capital investment and an initial forecast of up to 173,000 passengers. Longer-term development stages are forecast to grow activity toward 574,000 passengers by 2045 and 611,000 passengers by 2048.

Next Steps

To move forward, the Master Plan recommends the following actions:

- 1 Adopt Master Plan
- 2 Develop funding strategy
- 3 Engage with airline carriers
- 4 Advance design development
- 5 Position for long-term growth

- 1) Adopt the finalized Airport Master Plan with commission approval (2025), as part of the EPS preparatory work, including developing detailed concepts for interim facilities, ground access, and CATSA compliance, while prioritizing charter and ad hoc service in the 2026-2028 period.
- 2) Develop and resource a government funding strategy (provincial/federal), ensuring alignment with broader regional priorities (2025).
- 3) Engage with potential airline carrier partners to gauge interest in commercial service, supported by a defined marketing strategy and value proposition (2026).
- 4) Advance design development and impact assessments for Stage 1 expansion, in coordination with funding approvals (2026).
- 5) Position the Airport for long-term growth by maintaining competitiveness on airport charges, expanding value-added services, and integrating with regional tourism and business development strategies.

The success of the Master Plan will depend on turning recommendations into tangible actions. Early wins such as securing funding commitments, expanding terminal capacity, or striking agreements with service providers will be critical for driving progress. By focusing on visible, achievable steps in the near term, the Airport can build confidence among residents, partners, and governments.

A Gateway for the Next Generation

The Niagara District Airport 2025–2045 Master Plan is ultimately a story of possibility. It envisions a future where Niagara welcomes visitors directly by air, where residents

have convenient travel options, where businesses have seamless connectivity, whether by air, transit or car, and where aviation innovation takes root. It shows industry leaders, municipal partners and residents that the Airport is more than a runway — it is a catalyst for jobs, growth, and connectivity.

The path forward is clear: careful stewardship, staged investment, and unwavering commitment. With these priorities in mind, the Airport can become a true gateway to the region, helping Niagara attract more visitors, support economic growth, expand connectivity for residents and generate opportunities of the next twenty years and beyond.

This Master Plan proposes not only infrastructure improvements, but also the potential for a lasting legacy. The investments made over the next two decades will shape how Niagara is experienced by residents, visitors, and businesses for generations. The Airport's transformation into a true regional gateway will stand as a symbol of Niagara's ability to think big, plan responsibly, and deliver results that benefit the entire community.