

**Region of Waterloo**  
**Planning, Development, and Legislative Services**  
**Region of Waterloo International Airport**

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**To:** Sustainability, Infrastructure, and Development  
**Meeting Date:** September 9, 2025  
**Report Title:** Airport Growth Plan Update

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**1. Recommendation**

For information.

**2. Purpose / Issue:**

To provide Regional Council with an overview of the draft 2025 Region of Waterloo International Airport (YKF) Growth Plan, ahead of consultation with industry, tenant and community interest holders. A final Region of Waterloo Airport Growth Plan is anticipated for Council consideration in Q1 2026.

The plan will be subject to Regional Council’s review and approval through the Region’s annual Plan and Budget process.

**3. Strategic Plan:**

This report addresses the Homes for All strategic priority, as YKF is a key economic driver for Waterloo Region, supporting jobs and investment within the aviation and aerospace sector. The report also addresses the Climate-Aligned Growth strategic priority, as it presents a plan to develop YKF in a sustainable and environmentally conscience manner.

**4. Report Highlights:**

- The Region of Waterloo International Airport (YKF) is an important economic driver for the local economy and a gateway which connects the community to the rest of the world. This year, YKF celebrates its 75<sup>th</sup> anniversary, and continues to grow with the community.
- The Region of Waterloo International Airport Growth Plan is a long-term strategy document that guides the evolution of the airport and it’s surrounding lands for the next 20 years. It looks to build on the existing success of the airport, while ensuring the organization is working towards clear goals and a shared vision.

- YKF continues to be well-positioned as a regional airport with significant advantages, including purpose-built infrastructure, potential for connectivity to multimodal transportation, available capacity to support a growing and broader Southern Ontario aviation strategy, and the strong support of local business community, industry leaders and Waterloo Region residents.
- As part of the Growth Plan's development, an extensive public consultation process with industry partners, local businesses and residents is critical to creating a meaningful and realistic plan.
- Early consultation (Fall/Winter 2024) led to the development of the key principles found in the current draft Growth Plan, including:
  - YKF as a mobility hub for a community of 1 million;
  - Just-in-time infrastructure strategy;
  - Sustainability and environment;
  - Aerospace sector development; and
  - Managing competing land uses.
- A robust second round of public consultation (September – December 2025) will gather specific feedback on the existing draft and inform the final plan, which will return to Regional Council for review in Q1 2026.
- The previous Airport Master Plan was approved by Regional Council in 2017, and has been refreshed and renamed to reflect YKF's projected growth, current aviation trends, and its role in both the global and local context. The updated Growth Plan continues to use a phased, 'just-in-time' development strategy—meaning that new investments in infrastructure will only be made when specific passenger volumes are reached or when service levels begin to decline. This approach helps YKF maximize the use of existing facilities, manage financial risk, and remain flexible in responding to industry changes, all while maintaining a high standard of customer service.
- The Airport Growth Plan plays a critical role in communicating The Region of Waterloo's shared vision for the airport's future, attracting and retaining partners and investment and providing best-in-class customer service to the community.

## **5. Background:**

An Airport Master Plan is an industry requirement to outline the long-term strategy that guides the evolution of an airport and the surrounding lands for the next 20 years. It includes a SWOT analysis, economic impact and leakage study, financials and timelines and outlines the plan for the airport's future goals and aspirations. It also addresses land

use planning matters for the airport and surrounding lands.

The existing Airport Master Plan was approved by Regional Council in 2017, and utilized a “just-in-time” development strategy for new investments. This approach continues to help YKF maximize the use of existing facilities, manage financial risk and remain flexible to industry changes, while maintaining a high standard of customer service. The 2017 Airport Master Plan set the stage for strategic investments at YKF leading to a dramatic increase in passenger service and aerospace employment at the airport. This long-range strategy proved critical in facilitating change and growth from 2017 to 2025. Since 2020, the Canadian aviation landscape has changed significantly, and YKF is consistently adapting to new commercial and operational realities. In 2024, YKF was one of Canada’s busiest airports with over 130,000 aircraft movements and 523,000 passengers travelling through the airport in 2024. Changes to airline operations in 2025 will see passenger numbers be reduced, while aviation and aerospace industry sector growth at YKF and within the region as a whole continue to thrive.

The draft 2025 Airport Growth Plan (renamed from Master Plan to respond to the Region of Waterloo’s commitment to reconciliation, equity, diversity and inclusion), responds to the current levels of commercial service and plans for its ongoing evolution, focuses on supporting the growth of the aviation and aerospace sector, the essential role of YKF in the global supply chain, and looks ahead at sustainability, and YKF as a mobility hub for a community of one million residents.

Extensive first round consultation with industry partners, airport tenants, Area Municipalities, passengers, the local business community and residents of Waterloo Region and Guelph was held throughout 2023 and 2024. This included roundtable discussions, one-on-one interviews, EngageWR surveys and third-party research to collect input on the airport and its current and future role in the community and broader industry. This early engagement helped to inform the development of the draft 2025 Airport Growth Plan.

A new round of engagement is now planned for the draft 2025 Airport Growth Plan to be reviewed by many interest holder groups. From September through December 2025, staff will meet with Area Municipalities, the Airport Business Advisory Committee, industry leaders, airline and tenant partners, passengers and residents to share the draft plan and receive feedback. This engagement will inform the final report for Regional Council which will be shared in Q1 2026.

The draft Airport Growth Plan includes the following highlights:

- YKF as a mobility hub for 1 million people
  - Updated passenger forecast (over 3 million possible annual passengers within a 40km radius)

- If warranted by demand, a new Air Terminal Building proposed in a new location on the north side of the airport, including new entrance road from Menno Street
- Planned Transit Corridor
  - Fixed GRT Routes
  - Potential light rail connectivity
- Enhanced passenger experience
- “Just-in-Time” Infrastructure Strategy
  - Updated Development Triggers
  - Runway 14-32 extension design complete, awaiting funding approval from Federal / Provincial governments
  - Site servicing plans and partnerships
- Sustainability and the Environment
  - Decarbonization Action Plan
  - Climate action commitments and long-term target
  - Net-Zero Design for New Terminal Building
  - Natural Heritage Management Plan
  - Indigenous Landscape Project
- YKF as a driver for Aviation and Aerospace Sector Development
  - Advancing the vibrant aeronautics cluster within the airport campus, economic policies and program, and associated Aviation & Aerospace Business Park
- Managing Conflict with Competing Land Uses
  - Federal Airport Zoning Regulations update to protect airport and modern approach / departure paths from incompatible land uses
  - Aligning land use planning in Waterloo Region to further protect YKF airspace
  - Removal of the planning and protection for a third runway at YKF
- The Airport Growth Plan also includes updated financials and timelines,

## SWOT analysis, Economic Impact and Leakage Study

Similar to the 2017 Airport Master Plan, this plan provides a framework for just-in-time decision making and investment. This model sees planning and design work proceed in advance of potential demand, which allows the Region of Waterloo to move quickly with infrastructure projects when the need materializes.

The Airport Growth Plan employs the same trigger-based philosophy and further defines the trigger points that will lead to key investment decisions for new development.

### **Development Stage No. 2 – Secondary Runway Extension and New Terminal Planning**

- Construction of Secondary Runway Extension Trigger: Partner funding for runway infrastructure.
- Planning for New Terminal Trigger: Council approval of the Airport Growth Plan and indication of passenger growth.

### **Development Stage No. 3 – Current Terminal Expansion and Primary Runway Extension**

- Construction of Current Terminal Expansion Trigger: Desired level of passenger experience is no longer sustainable due to demand exceeding the capacity of the current air terminal building (approx. 1 million annual passengers).
- Construction of Primary Runway Extension Trigger: Demand established for longer runway and partner funding for runway infrastructure.
- Design of New Terminal Trigger: Indication of passenger growth beyond 1 million annual passengers.

### **Development Stage No. 4 – Future Terminal Building Construction**

- Construction of New Terminal Trigger: Desired level of passenger experience is no longer sustainable due to demand exceeding the capacity of the expanded air terminal building and confirmation of passenger growth beyond 1.5 million annual passengers.

Looking ahead, the major change in this Airport Growth Plan is the introduction of a new greenfield terminal, if required through passenger demand exceeding capacity at the current terminal building. The new greenfield terminal would be located on the north side of the airport and would have a clear focus on sustainability. This suggested net-zero facility would be sized to accommodate the anticipated air travel demand within Waterloo Region and Guelph area, which is currently estimated at 3.4 million passengers per year within the airport's 40km catchment area. The future terminal

would be located and designed in a manner to connect to high-capacity transit (Light Rail Transit or Bus Rapid Transit) on the completed Ottawa Street intensification corridor and conveniently located in close proximity to the future Breslau GO Station. The existing terminal could be repurposed as an educational facility, fixed-base operator (FBO), or office space for another major aviation tenant yet to be attracted to the airport. It is anticipated that several years of environmental work, design and approvals is needed before a shovel could be in the ground for a new terminal facility in this location.

It is also proposed that the existing Airport Road campus evolve to support Waterloo Region's growing aeronautics sector. Working with industry partners, the campus would allow companies and post-secondary institutions in multiple segments of the sector to accelerate new investment and job creation opportunities in Waterloo Region.

Another major change in this Airport Growth Plan is removal of considerations for a third runway at YKF. Transport Canada has completed a study which determined that the airside capacity at YKF is estimated at 158,400 movements. In 2024, the aircraft movements were 130,000 which mostly consisted of flight training and general aviation. It was determined that the Airport will not require the third runway due to capacity that could be achieved with the Airport's existing two-runway system.

The Airport Growth Plan also introduces a Natural Heritage Management Plan that seeks to enhance the ecosystem on airport lands and compensate for environmental impacts from development. In consultation with Six Nations of the Grand River and the Mississaugas of the Credit First Nation, it proposes an Indigenous Landscape Project which will guide the naturalization and interpretation of airport parcels that have clear evidence of indigenous land use through the entire post-glacial period.

The 2025 Airport Growth Plan is a critical strategy document to assist the Region of Waterloo in business development in both commercial and general aviation, advance our government relations efforts and present a shared vision for YKF and the region's future.

## **6. Communication and Engagement with Area Municipalities and the Public**

**Area Municipalities:** Consultation throughout the plan development process has included staff at City of Cambridge, City of Kitchener and Township of Woolwich, as well as the City of Cambridge Economic Development Committee.

**Public:** In 2023 and 2024, initial consultation was completed with existing airport tenants, airlines, Nav Canada, the Airport Business Advisory Committee, Chambers of Commerce, Explore Waterloo Region, Communitel, Six Nations of the Grand River Elected Council, and Mississaugas of the Credit First Nation. Business and industry leaders see YKF as a critical part of the overall business development infrastructure and creates substantial economic advantages, as well as a way to strengthen Waterloo Region as a global innovation and business hub.

Broad public consultation through Engage WR, YKF passenger surveys and third-party research with Nanos Research, have highlighted significant community support for the airport and is outlined in detail in the updated Growth Plan. Key themes include how easy and comfortable it is to navigate through YKF, personal and friendly service, the benefit of having an airport “close to home” and underscored the importance of airline service to connecting residents to important personal experiences.

In September through December 2025, the second phase of public consultation on the draft Growth Plan will occur. This phase will include individual meetings with airport tenants, key stakeholders, the Airport Business Advisory Committee, surrounding municipalities, Six Nations of the Grand River Elected Council, and Mississaugas of the Credit First Nation. Public engagement will also take place through a YKF open house/public meeting as well as through the Region’s online platform, EngageWR, passenger surveys and third-party research firm.

This round of consultation will seek input on key elements of the draft plan, including proposed strategies, environmental impacts, economic benefits, transportation access, and long-term service levels. Feedback gathered will directly inform the final Airport Growth Plan to be presented to Council in Q1 2026.

## 7. Financial Implications:

	Current Year	Future Year(s)
<b>Budget Impact?</b>	N/A	To be integrated into future plan cycles
<b>Capital Plan Impact?</b>	N/A	To be integrated into future plan cycles

Regional staff will complete analysis of the estimated financial impact of the draft Airport Growth Plan, the detailed results of which will be presented for Council’s consideration in January 2026; and will be integrated into future plan and budget cycles.

## 8. Conclusion / Next Steps:

As the aviation industry landscape evolves, travel patterns continue to shift post-pandemic and there is an increased demand for convenient and affordable air service, YKF continues to provide service, opportunity and connectivity for Waterloo Region and Southern Ontario.

The 2025 draft Airport Growth Plan outlines a refreshed plan for the Region of Waterloo International Airport’s 20-year future. Industry and public consultation of the draft plan will occur in the remainder of 2025, with a final Growth Plan and financial model to be

reviewed by Council in early 2026.

**9. Attachments:**

Appendix A: YKF Growth Plan Draft Executive Summary – August 2025

Appendix B: YKF Growth Plan Council Presentation

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