



North Atlantic

Appendix G: Socio-Economic Baseline Study

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List of Acronyms and Abbreviations

AAC	Annual Allowable Cut
ABE	Adult Basic Education
ATV	All-Terrain Vehicle

BAF	Bull Arm Fabrication
Braya	Braya Renewable Fuels
CNA	College of the North Atlantic
DFO	Department of Fisheries and Oceans
DWT	Deadweight ton
ERSB	Eastern Regional Service Board
FRC	Friends Family Resource Centre
GDP	Gross Domestic Product
GFN	Grieg Seafood Newfoundland
ha	hectares
HGP	Hydrogen Generation Plant
HP	Hydrogenation Plant
IMTT	International-Matex Tank Terminals
kV	kilovolt
LAA	Local Assessment Area
LHDC	Long Harbour Development Corporation
LHPP	Long Harbour Processing Plant
LOHC	Liquid Organic Hydrogen Carrier
mt	metric tonne
MW	Megawatt
N/A	Not applicable
NAICS	North American Industry Classification System
NL	Newfoundland and Labrador
NL DTI	Newfoundland and Labrador Department of Transportation and Infrastructure
NL CSSD	Newfoundland and Labrador Department for Children, Seniors and Social Development
NL DE	Newfoundland and Labrador Education Department
NL DECC	Newfoundland and Labrador Department of Environment and Climate Change
NL FES	Newfoundland and Labrador Fire and Emergency Services
NL FFA	Newfoundland and Labrador Department of Fisheries, Forestry, and Agriculture
NLH	Newfoundland and Labrador Hydro
NLHC	Newfoundland and Labrador Housing Corporation
NL HCS	Newfoundland and Labrador Department of Health and Community Services
NLSA	Newfoundland and Labrador Statistics Agency
North Atlantic	North Atlantic Refining Corp.
NTL	Newfoundland Transshipment Limited
PA	Project Area
PoA	Port of Argentia
RAA	Regional Assessment Area
RCMP	Royal Canadian Mounted Police
ROW	Right of Way
RSR	Rural Secretariat Regions
RV	Recreational Vehicle
TCH	Trans-Canada Highway
VC	Valued components

1.0 Introduction

North Atlantic Refining Corp. (North Atlantic) is proposing to undertake the development of a Wind to Hydrogen project (the Project) on the Isthmus of Avalon Region in Newfoundland and Labrador (NL). This Project will entail the development, construction, operation and eventual decommissioning of a 324-megawatt (MW) Wind Farm consisting of 45 wind turbines on an undeveloped peninsula situated between Sunnyside and Deer Harbour. The Wind Farm will provide renewable electricity via a 138 kV transmission line to a newly developed Hydrogen Generation Plant (HGP), from where generated hydrogen will be transported to a Hydrogenation Plant (HP) for transformation into a Liquid Organic Hydrogen Carrier (LOHC), which will then be shipped from North Atlantic's port facilities to international markets for use in various decarbonization technologies.

1.1 Scope of the Socio-Economic Baseline Study

The Socio-Economic Baseline Study has been prepared to address requirements for baseline information outlined in the NL Guidance for Registration of Onshore Wind Energy Generation and Green Hydrogen Production Projects. The study is mainly focused on the following two valued components (VCs) identified in the Guidance document:

- Communities
- Economy, Employment and Business

The Socio-Economic Baseline Study incorporates publicly available information to describe existing socio-economic conditions. A separate Land and Resource Use Baseline Study has been prepared for this Project.

1.2 Limitations

The most recent census of the Canadian population was conducted in June 2021 and is one of the most important sources of data for this report. Even with current census data, some detailed data are not available, particularly at the community level. Limited community data are available through the NL Statistics Agency (NLSA) which publishes census information based on alternative dissemination areas along with data from provincial agencies through Community Accounts. Like the census, datasets may be limited at the community or regional level, and data may not be released due to privacy concerns regarding small populations.

Statistics Canada uses a process of 'random rounding', where "to ensure confidentiality, the values, including totals, are randomly rounded either up or down to a multiple of '5' or '10.' To understand these

data, [one] must be aware that each individual value is rounded. As a result, when these data are summed or grouped, the total value may not match the individual values since totals and sub-totals are independently rounded. Similarly, percentages, which are calculated on rounded data, may not necessarily add up to 100%" (Statistics Canada, 2022b).

Due to the COVID-19 pandemic, some 2020 and 2021 data and information are of limited use for identifying general trends. Many indicators were affected by public health emergency measures, including closures, limits on usage and travel restrictions. Thus, data may be misrepresentative of trends that would normally reveal changes and emerging issues.

2.0 Communities Baseline

The Communities Baseline Study provides information on relevant topics for community services and infrastructure and community health and wellbeing. Demographic profiles of the communities are also provided to better understand the region and potential vulnerabilities related to the Project.

Community services and infrastructure includes transportation, permanent housing, temporary accommodations, education and training, childcare, health and social supports, water and sewer services, solid waste management, utilities, communications, prevention and emergency services, and recreation. These services and infrastructure are used by residents and may be operated and maintained by government authorities (e.g., municipal, provincial and/or federal) or non-government agencies. Community services and infrastructure may be affected by changes in demand arising from Project activities and the presence of a Project labour force particularly during construction.

Community health and wellbeing addresses the ability to conduct daily activities. The presence of the Project workforce could adversely affect the wellbeing of residents in communities close to the Project by altering demographics or disrupting community life. However, the Project may also contribute to positive effects on community wellbeing through employment and business opportunities and related benefits, as well as other outcomes (e.g., government revenue used to support social programs).

2.1 Methods

Secondary sources of information have been used to describe existing conditions. The desktop study accessed information from government agencies (e.g., Statistics Canada, federal departments, departments of the Government of NL and municipal governments), along with publicly available data and literature from a variety of organizations.

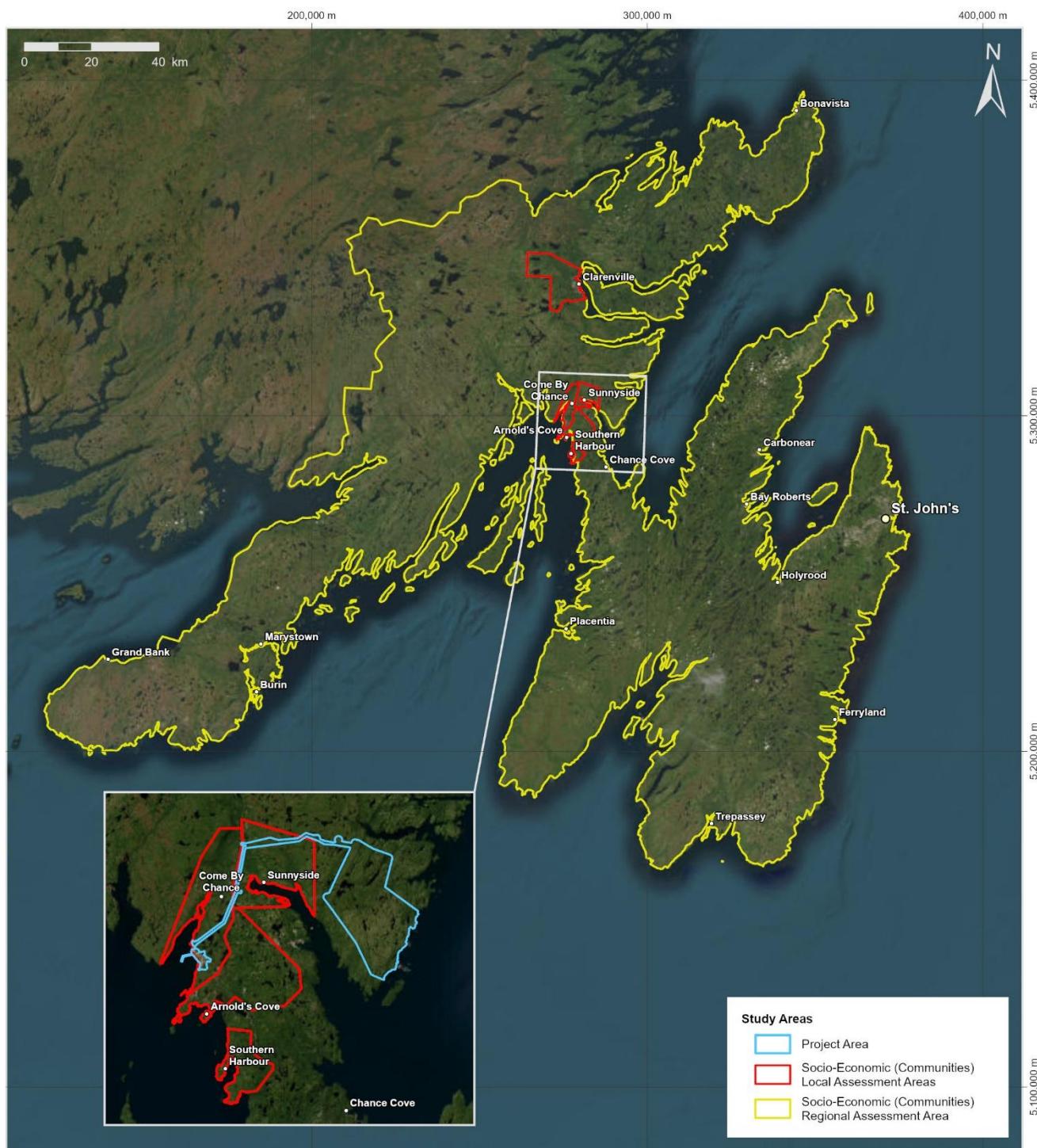
Much of the Communities Baseline description relies on the 2021 Census of the Population even though census data may be suppressed to protect sensitive information in small communities and to address data quality issues. Data suppression and / or rounding may result in zero (0) where numbers and percentages are below five (5). Where relevant data were not available for the Local Assessment Area (LAA) or Regional Assessment Area (RAA), information for the most comparable jurisdictions was used. For instance, as data sets are not readily available for the Eastern Region, the area covered by the Eastern Health Authority from the census profile has been used.

2.1.1 Spatial Boundaries

The Project Area (PA) is defined as “the area in which Project infrastructure components and activities (e.g., construction, operation and maintenance, decommissioning and rehabilitation) will occur, and within the boundaries of which direct environmental interactions with the Project will likely occur”. The PA includes all proposed infrastructure and construction related to the Project, encompassing both the development and operation of hydrogen generation and wind energy components. The Wind Farm infrastructure, situated on provincial Crown lands designated as a Green Energy Reserve, includes wind turbines, access roads, collector and transmission lines, electrical substations, an operation and maintenance building, a laydown area, and a batch plant. Together, these components form an integrated system to generate and transmit renewable energy to the HGP. The HGP and HP infrastructure, located on existing North Atlantic property within the North Atlantic Logistics Terminal, includes the HGP, the HP, an electrical substation, office, warehouse and existing infrastructure for storage and transportation of hydrogen. The North Atlantic Logistics Terminal infrastructure consists of the port and terminal, tank farm and truck rack, and energy support services. For linear features, including the transmission line and access roads, the PA is defined as a corridor extending 100 metre (m) on either side of the feature's centerline. To address edge effects along the linear corridor and allow for potential adjustments to the Right of Way (ROW) alignment, the buffer has been applied on either side of the transmission lines. The Sunnyside Substation serves as the point of interconnection with the Newfoundland and Labrador Hydro (NLH) electrical grid, with transmission lines linking the Wind Farm Substation to the HGP Substation and connecting the Sunnyside Substation to the HGP Substation.

For the assessment of Project effects on communities, the LAA includes the Towns of Sunnyside, Come By Chance, Arnold's Cove, Southern Harbour and Clarenville (Figure G-2.1-1). These communities are most likely to provide services to the Project and experience interactions with Project activities and the workforce.

The RAA encompasses the Eastern Region as some of the services and infrastructure required for the Project are not available in the LAA. Likewise, due to small populations in the LAA, a portion of the construction workforce is anticipated to come from throughout the Eastern Region.



 North Atlantic	FIGURE TITLE: Study Areas: Communities	NOTES: Contains information licensed under the Open Government License - Newfoundland and Labrador	PREPARED BY: C. Bursley	DATE: 13/06/2025
	PROJECT TITLE: North Atlantic Wind to Hydrogen Project		REVIEWED BY: C. Burke 13/06/2025	APPROVED BY: C. Collins 13/06/2025

Figure G-2.1-1 Study areas: Communities.

2.2 Demographic Profile

The five communities in the LAA may have been settled for more than a century but they have been municipalities for less than 75 years. Clarenville was incorporated in 1951, Arnold's Cove in 1967, Southern Harbour in 1968, Come By Chance in 1969 and Sunnyside in 1970 (NLSA, 1988).

As a regional service centre, Clarenville (population of 6,704 in 2021) is the largest of the five communities (Table G-2.2-1). While Arnold's Cove had a population of nearly 1,000 in 2021, the other three communities each had less than 500 inhabitants. Between the last two censuses, the population of Come By Chance decreased. The population of each of the other communities increased, as did the Eastern Region and NL (Statistics Canada, 2023a).

Table G-2.2-1 Population change.

Community/Area	Population		Change	
	2016	2021	#	%
Sunnyside	396	407	11	3%
Come By Chance	228	208	-20	-9%
Arnold's Cove	949	964	15	2%
Southern Harbour	313	395	82	26.2%
Clarenville	6,291	6,704	413	6.6%
Eastern Region	313,267	313,365	98	0.03%
NL	519,550	519,716	166	1.8%

Source: (Statistics Canada, 2019, 2023a)

For the Province, the median age of the population rose by 5% in a 10-year period from 46 years in 2011 to 48.4 years in 2021 (Statistics Canada, 2023a). The median age of the Eastern Region is increasing at a faster rate: it was 42.5 in 2011 and 46.4 in 2021 an increase of 8% (Statistics Canada, 2012). In 2021, the NL median age was two years above the median age of the Eastern Region and 3.2 years above the median age of Clarenville (Table G-2.2-2). In the four smaller communities, the median age was higher than the other jurisdictions.

Table G-2.2-2 Population average/median age and household size (2021).

Indicator	LAA					RAA	NL
	Sunnyside	Come By Chance	Arnold's Cove	Southern Harbour	Clarenville	Eastern Region	
Median age	52.0	49.2	52.4	58.0	45.2	46.4	48.4

Source: (Statistics Canada, 2023a)

2.2.1 Natural Population Change

Birth and death data are not available for each of the communities in the LAA, but they are for Eastern Region and NL. In 2021 and 2022, the number of deaths in the Eastern Region exceeded the number of births resulting in net natural population decline (Table G-2.2-3). Similar trends were experienced in NL generally. The data are indicative of an aging population, declining birth rate and out-migration from the communities. The data also confirm that newcomers to the Province or Canada are the source of population growth.

Table G-2.2-3 Births versus deaths, Eastern region and NL.

Indicator	Eastern Region		NL	
	2021	2022	2021	2022
Births	2,505	2,300	3,900	3,585
Deaths	3,320	3,560	5,820	6,375
Net	-815	-1,260	-1,920	-2,790

Sources: (NLSA, 2023a, 2023b)

2.2.2 Family Life

For each of the jurisdictions examined, the proportion of couple families in 2021 exceeded that of one-parent families (Table G-2.2-4). Among couple families, the proportion without children exceeded those with children across all jurisdictions, with the highest percentages of couple families without children observed in Sunnyside and Southern Harbour. One-parent families accounted for a smaller share of households. Among one-parent families, women+ were far more likely than men+ to head a household, except in Come By Chance where single-parent households was equally headed by women+ and men+. Table G-2.2-4 presents family composition data for households in the LAA, RAA, and the province.

Table G-2.2-4 Census family¹ private households (2021).

Indicator	LAA					RAA	NL
	Sunnyside	Come By Chance	Arnold's Cove	Southern Harbour	Clarenville		
Total couple families (%)	92.3	92.3	86.7	86.4	84.7	83.6	84.2
Total with children (%)	30.8	30.8	25.0	18.2	30.4	31.1	28.6
Total without children (%)	57.7	38.5	43.3	50.0	36.9	36.8	40.0
Total one-parent families (%)	7.7	15.4	15.0	13.6	15.3	16.4	15.8
In which the parent is a woman+ (%)	3.8	7.7	10.0	9.1	12.8	12.9	12.3
In which the parent is a man+ (%)	0.0	7.7	3.3	4.5	2.5	3.5	3.5

Source: (Statistics Canada, 2023a)
Notes

Indicator	LAA					RAA	NL	
	Sunnyside	Come By Chance	Arnold's Cove	Southern Harbour	Clarenville	Eastern Region		
¹ A census family is defined as a married couple (with or without children), a common-law couple (with or without children) or a one-parent family (Statistics Canada, 2023a).								
"Men+" include men (and/or boys), as well as some non-binary persons, and "women+" includes women (and/or girls), as well as some non-binary persons (Statistics Canada, 2021).								
These data do not appear to total are likely affected by rounding.								

For each of the jurisdictions examined, the percentage of one person households in 2021 was higher than those living with others (Table G-2.2-5). In Arnold's Cove, the proportion of persons reported as living alone in 2021 was highest among the jurisdictions. In each jurisdiction, persons living alone were most often identified as women+.

Table G-2.2-5 Non-census² family private households (2021).

Indicator	LAA					RAA	NL
	Sunnyside	Come By Chance	Arnold's Cove	Southern Harbour	Clarenville	Eastern Region	
Living alone (%)	13.4	9.8	14.4	12.7	12.0	12.6	12.4
Living with other relatives (%)	2.4	0.0	1.1	0.0	1.6	2.1	2.1
Living with non-relatives only (%)	2.4	2.4	1.1	1.6	2.6	3.9	3.3

Source: (Statistics Canada, 2023a)

Notes

² Non-census-family households are either one person living alone or a group of two or more persons who live together but do not constitute a census family.

In the 2021 to 2023 period, life expectancy at birth in NL was 81.24 years for females and 77.11 for males (Statistics Canada, 2024a). Since 2017, life expectancy has decreased for males (from 77.97) and for females (from 81.98). Declines in life expectancy for both sexes have been most evident since 2019, perhaps due to the COVID-19 pandemic.

2.2.3 Migration

In 2021, Arnold's Cove, Clarenville, the Eastern Region and NL had a net surplus of in-migration over the previous year (Table G-2.2-6). Sunnyside, Come By Chance and Southern Harbour showed limited in-migration.

Table G-2.2-6 Migration status³ 1 year ago (2021).

Migrants	LAA					RAA	NL
	Sunnyside	Come By Chance	Arnold's Cove	Southern Harbour	Clarenville	Eastern Region	
# people	0	0	40	0	395	12,795	20,180
%	0	0	4.3	0	6.1	4.2	4

Source: (Statistics Canada, 2023a)

Notes

³ In the Canadian Census of Population (2021, 2016), migrants include internal migrants, who moved to a different city, town, township, village or Indian reserve within Canada. External migrants include persons who lived outside Canada at the earlier reference date.

2.2.4 Indigenous Population

In the 2021 census, most communities in the LAA reported only a small percentage of population with Indigenous identity and/or ancestry (Table G-2.2-7). However, 12.1% of the Come By Chance population reported Indigenous identity, which was higher than the Eastern Region and NL overall.

Table G-2.2-7 Indigeneity indicators 2021.

Indicator	LAA					RAA	NL
	Sunnyside	Come By Chance	Arnold's Cove	Southern Harbour	Clarenville	Eastern Region	
	%	%	%	%	%	%	
Indigenous identity ⁴	2.1	12.1	5.3	7.7	2.8	2.9	9.3
Indigenous ancestry (only) ⁵	0.0	0.0	4.3	9.6	2.4	1.6	6.3
Indigenous and non-Indigenous ancestries ⁶	0.0	0.0	2.1	0.0	2.6	3.1	5.4

Source: (Statistics Canada, 2023a)

Notes

⁴ This category includes persons who identify as First Nations (North American Indian), Métis and / or Inuk (Inuit) and / or those who report being Registered or Treaty Indians (that is, registered under the Indian Act of Canada), and / or those who report having membership in a First Nation or Indian band.

⁵ 'Indigenous ancestry (only)' includes persons who have First Nations (North American Indian), Métis and / or Inuit ancestry. It excludes persons with non-Indigenous ancestry.

⁶ 'Indigenous and non-Indigenous ancestries' includes persons who have First Nations (North American Indian), Métis and / or Inuit ancestry, as well as non-Indigenous ancestry.

2.2.5 Diversity

Several diversity criteria have been selected for the LAA, RAA and NL based on the 2021 census (Table G-2.2-8). The data show the population diversity of the four smaller communities in the LAA was lower than the other jurisdictions, although none were highly diverse. In Clarenville, a proportion of individuals indicated being an immigrant or part of a visible minority. In 2021, people in the Eastern Region identifying as being part of a visible minority originated from countries in Asia, Europe, the Americas and Africa.

Table G-2.2-8 Selected diversity indicators 2021.

Indicator	LAA						RAA	NL
	Sunnyside	Come By Chance	Arnold's Cove	Southern Harbour	Clarenville	Eastern Region		
	%	%	%	%	%	%		
Immigrants ⁷	0.0	0.0	0.0	0.0	2.7	3.5	2.8	
Visible minorities ⁸	0.0	0.0	0.0	0.0	3.3	4.3	3.4	

Source: (Statistics Canada, 2023a)

Notes

⁷ 'Immigrants' includes persons who are, or who have ever been, landed immigrants or permanent residents. Such persons have been granted the right to live in Canada permanently by immigration authorities.

⁸ The Canada *Employment Equity Act* defines 'visible minorities' as "persons, other than Aboriginal peoples, who are non-Caucasian in race or non-white in colour." The visible minority population consists mainly of the following groups: South Asian, Chinese, Black, Filipino, Arab, Latin American, Southeast Asian, West Asian, Korean and Japanese.

2.2.6 Education

In 2021, people in Clarenville and the RAA had a higher tendency towards pursuing a university education than people living in Sunnyside, Come By Chance, Arnold's Cove, Southern Harbour and NL generally (Table G-2.2-9). Residents of Sunnyside were more likely to be trained in trades than those in the other jurisdictions. A higher proportion of Southern Harbour residents had no certificate, diploma or degree, including high school completion or equivalency compared to the other jurisdictions. Additionally, Sunnyside, Come By Chance, Arnold's Cove and Southern Harbour all had a higher proportion of residents with an apprenticeship diploma than NL residents.

Table G-2.2-9 Education of individuals aged 25 to 64 years (2021).

Indicator	LAA		RAA					NL
	Sunnyside	Come By Chance	Arnold's Cove	Southern Harbour	Clarenville	Eastern Region		
No high school diploma or equivalency certificate (%)	8.9	26.1	17.3	31.3	11.1	11.2	14.4	
Apprenticeship or trades certificate or diploma (%)	17.9	13.3	11.0	9.4	10.5	9.3	11.2	
Bachelor's degree or higher (%)	4.8	0.0	8.5	0.0	15.6	20.0	13.4	

Source: (Statistics Canada, 2023a)

Women+ had higher high school and university education levels than men+ in Arnold's Cove, Clarenville, Eastern Region and NL (Statistics Canada 2023a). Men+ were more likely to hold an apprenticeship or trades certificate or diploma than women+ in all jurisdictions. Very few (reported as 0%) of the population of Come By Chance or Southern Harbour had a university degree.

Major fields of study are shown in Table G-2.2-10. In 2021, the most common field of study in NL was “Architecture, Engineering and Related Trades”, largely dominated by men+. Women+ were more likely to be educated in “Education”, “Business Management and Public Administration” or “Health and Related Fields”.

Table G-2.2-10 Major field of study for population aged 25 to 64 years (2021).

Indicator		LAA					RAA	NL
		Sunnyside	Come By Chance	Arnold's Cove	Southern Harbour	Clarenville		
Education (%)	Men+	0	0	4.9	0.0	4.4	2.6	2.6
	Women+	0	0	2.5	0.0	7.4	6.2	5.7
Humanities (%)	Men+	0	0	0	0.0	1.0	1.0	1.6
	Women+	0	0	0	0.0	0	1.1	2.0
English language and literature/ letters (%)	Men+	0	0	1.8	0.0	1.5	1.9	0.4
	Women+	0	0	0	0.0	1.1	2.4	0.6
Social and behavioural sciences and law (%)	Men+	0	0	0	0.0	1.2	2.8	2.1
	Women+	0	0	0	0.0	3.0	5.7	4.8
Business, management and public administration (%)	Men+	0	0	7.3	0.0	5.2	7.0	5.5
	Women+	23.3	23.1	3.7	16.0	19.0	17.9	16.4
Physical and life sciences and technologies (%)	Men+	0	0	0	0.0	1.0	1.8	1.4
	Women+	0	0	0	0.0	1.1	1.7	1.3
Mathematics, computer and information sciences (%)	Men+	0	0	1.2	0.0	1.9	2.8	2.1
	Women+	0	0	0	0.0	2.0	1.9	1.6
Architecture, engineering, and related trades (%)	Men+	40.5	35.3	21.3	30.8	27.5	26.1	25.0
	Women+	4.7	0	37.0	16.0	1.1	2.7	2.3
Agriculture, natural resources and conservation (%)	Men+	0	0	0	30.8	1.0	1.0	1.2
	Women+	0	0	0	16.0	0.0	0.8	0.8
Health and related fields (%)	Men+	0	0	2.4	0.0	4.6	3.0	2.7
	Women+	0	23.1	0	0.0	12.8	13.0	12.5

Indicator		LAA						RAA	NL
		Sunnyside	Come By Chance	Arnold's Cove	Southern Harbour	Clarenville	Eastern Region		
Personal, protective and transportation services (%)	Men+	9.5	0	3.7	7.7	5.8	5.9	6.9	
	Women+	0	0	3.7	0.0	3.9	3.7	3.7	
Source: (Statistics Canada, 2023a)									

In the Eastern Region, the percentage of men+ and women+ with education in identified fields varied significantly in 2021. For example, in “Business, Management and Public Administration”, education of men+ ranged from 0% in Sunnyside and Come By Chance to 7.3% in Arnold’s Cove, while women+ ranged from 3.7% in Arnold’s Cove to 23.3% in Sunnyside. In “Architecture, Engineering and Related Trades”, men+ had the highest representation, with percentages from 21.3% in Arnold’s Cove to 40.5% in Sunnyside. The proportion of women+ educated in this field was significantly lower, however the exception was for Arnold’s Cove at 37.0%. “Health and Related Fields” showed a notable gender difference, with women+ being educated at higher percentages, especially in Come By Chance (23.1%) and Clarenville (12.8%).

2.2.7 Income

In 2020, the median total income of households in NL was \$71,500, while it was \$75,500 in the Eastern Region and \$72,000 in Clarenville (Table G-2.2-11). Sunnyside reported the lowest income levels in the first two categories, compared to the other jurisdictions in the LAA where data were available. This may be explained by the community’s higher unemployment rate of 25.0% and the older population, many of whom would have retirement income only (Statistics Canada, 2023a).

Table G-2.2-11 Median total income of households (2020).

Indicator	LAA						RAA	NL
	Sunnyside	Come By Chance	Arnold's Cove	Southern Harbour	Clarenville	Eastern Region		
Median total income of households (\$)	62,400	N/A	75,500	66,500	72,000	75,500	71,500	
Median total income among recipients (\$)	31,400	N/A	37,200	33,600	37,200	38,800	36,800	
Median employment income in 2020 among recipients (\$)	27,400	N/A	27,000	20,600	32,000	34,800	31,600	
Source: (Statistics Canada, 2023a)								
<u>Notes</u>								
N/A = Not applicable.								

2.3 Infrastructure and Services

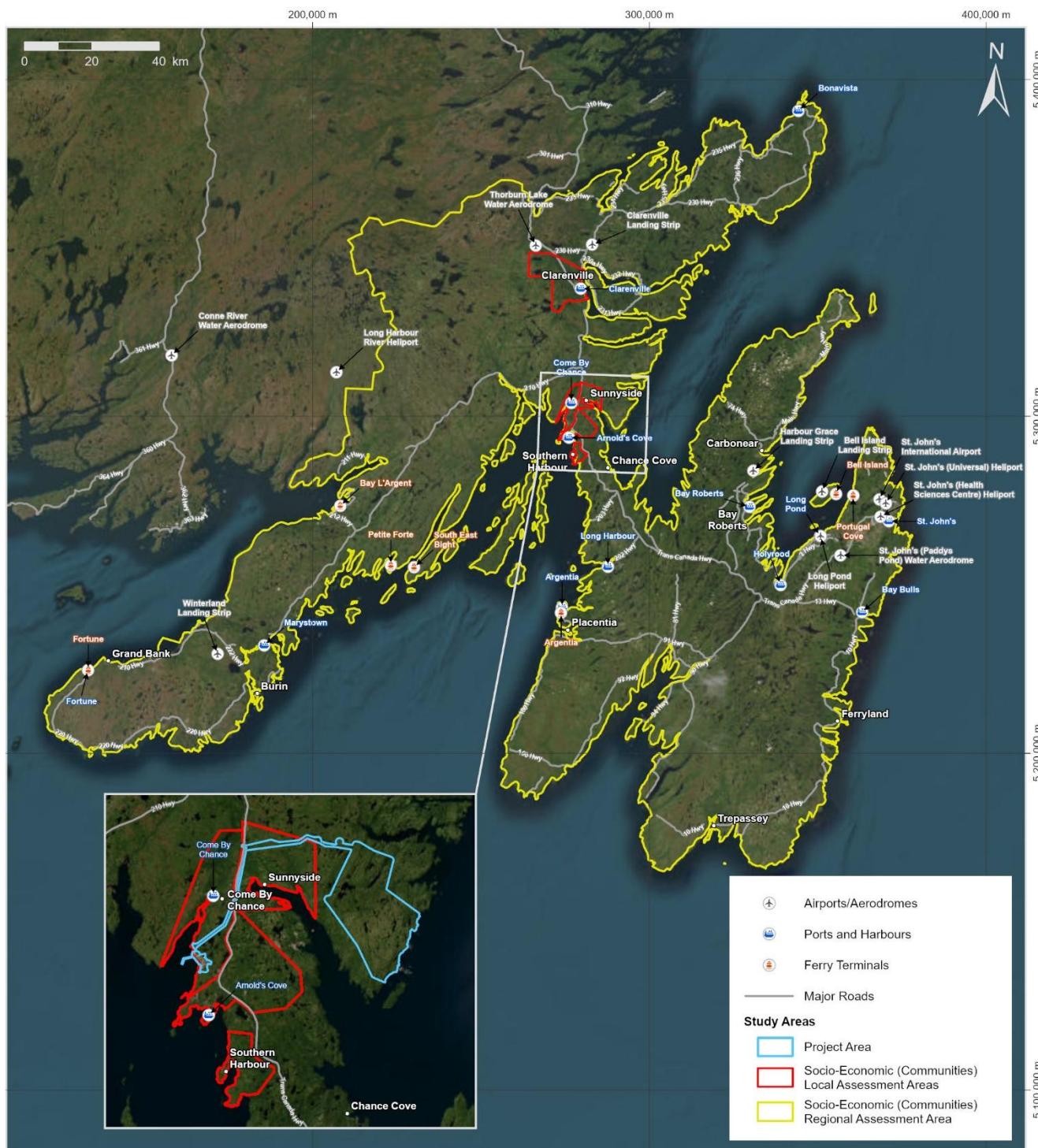
The introduction of development projects can affect usage and availability of infrastructure and services. Generally, permanent population increases, with a higher number of households and families, result in demand for housing, education, health care, childcare and recreation, as well as usage and capacity of water, sewerage, solid waste, communications and utilities. Population increase may also enhance the tax base and ability of communities to offer services. Temporary population increases (e.g., for a large-scale construction project) also result in increased demand for infrastructure and services, but mainly for water, sewerage, solid waste, communications and utilities, though they may also affect housing and transportation infrastructure and services depending on how non-resident workers are housed and transported during construction.

2.3.1 Transportation

The LAA communities are connected by road, air and marine transportation infrastructure and services (Figure G-2.3-1). Sunnyside, Come By Chance, Arnold's Cove, Southern Harbour and Clarenville are all accessed via roads off the Trans-Canada Highway. In 2024, the Government of NL announced a federal/provincial investment in the Trans-Canada Highway (TCH) that will result in an approximately 60 km section of divided highway in the Avalon region beginning at Whitbourne and heading west (NL Department of Transportation and Infrastructure [NL DTI], 2024). Brush clearing from Whitbourne to Sunnyside began in 2024. Government is seeking a proponent to design, construct, finance, and maintain the highway section as a public-private partnership.

The only airport in the RAA with regularly scheduled services by commercial carriers is St. John's International (NL DTI, 2021a). Landing strips are located at various sites including Clarenville, Winterland, Harbour Grace and Bell Island. Heliports are at Long Pond and St. John's (Health Sciences Centre and St. John's International Airport). Water aerodromes are located at Thorburn Lake and St. John's (i.e., Paddy's Pond).

Marine industrial ports in the Eastern Region include Bonavista, Clarenville, Come By Chance, Arnold's Cove, Bay Roberts, Long Harbour, Argentia, Holyrood, St. John's and Bay Bulls. Ferry services in the RAA are operated out of Argentia, Bay L'Argent, Fortune, Petite Forte/South East Bight and Portugal Cove/Bell Island (NL DTI, 2021b).



 <p>North Atlantic</p>	FIGURE TITLE:	<p>NOTES:</p> <p>Contains information licensed under the Open Government License - Newfoundland and Labrador</p>	PREPARED BY:	DATE:
	Transportation		C. Bursey	13/06/2025
PROJECT TITLE:	North Atlantic Wind to Hydrogen Project		REVIEWED BY:	C. Bursey 13/06/2025
			APPROVED BY:	C. Collins 13/06/2025
CRS:	WGS 1984 UTM Zone 22N			
				

Figure G-2.3-1 Transportation.

2.3.2 Housing

In 2016, the RAA had 155,452 total private dwellings with 131,074 of total private dwellings occupied by usual residents (i.e., dwellings in which a person or a group of persons is permanently residing) (Statistics Canada, 2019). Five years later, private dwellings totalled 159,580 (+4,128) with 136,035 occupied by usual residents (+4,961) (Statistics Canada, 2023a). The increase in private dwellings in the RAA is most likely due to population increase and smaller household size requiring more homes for a similar number of people.

Table G-2.3-1 Household and dwelling characteristics (2021).

Indicator	LAA					RAA	NL
	Sunnyside	Come By Chance	Arnold's Cove	Southern Harbour	Clarenville		
Single-detached house (%)	86.8	94.4	86.2	96.7	65.5	66.9	72.3
Semi-detached house (%)	2.6	0.0	1.1	0.0	3.2	3.6	3.9
Row house (%)	0.0	0.0	0.0	0.0	2.7	5.3	4.8
Apartment or flat in a duplex (%)	2.6	0.0	4.6	0.0	20.0	17.3	12.3
Apartment in a building that has fewer than five stories (%)	0.0	5.6	5.7	0.0	7.9	6.1	5.5
Source: (Statistics Canada 2023a)							

The 2021 home ownership rate for Canada was 66.5% a reduction of 2.5% from 2011 (Statistics Canada, 2022a). NL had the highest rate of home ownership (75.7%) among the provinces and territories in 2021, but the rate decreased by 1.8% (i.e., 77.5% in 2011). In the LAA, Sunnyside and Southern Harbour had the highest rates of home ownership (Table G-2.3-2). Home ownership rates with a mortgage were notably higher than in Arnold's Cove, Clarenville, the Eastern Region and NL. Except for Come By Chance, the percentage of owner households with a mortgage decreased in each of the jurisdictions between 2016 and 2021 (Statistics Canada, 2019, 2023a).

Table G-2.3-2 Home ownership (2021).

Indicator	LAA					RAA	NL
	Sunnyside	Come by Chance	Arnold's Cove	Southern Harbour	Clarenville		
Household owner (%)	92.9	86.7	77.0	92.6	66.0	74.6	75.7
Household renter (%)	9.5	13.3	23.0	7.4	34.0	25.4	24
Owner households with a mortgage (%)	34.2	42.9	40.3	19.2	59.3	52.4	47.4
Source: (Statistics Canada, 2023a)							

Housing conditions are generally favourable in NL and in the LAA. For each of the jurisdictions, a high proportion of housing was considered suitable and not in need of major repairs (Table G-2.3-3). Overcrowding is not likely as the jurisdictions showed small percentages of households (i.e., LAA: fewer than 5.7%, RAA: 4.3% and NL: 4.2%) with five or more persons in 2021 (Statistics Canada, 2023a). The average household size in the LAA and the RAA decreased from 2016 to 2021, whereas in NL, the average household size remained at 2.3 between over the same period (Table G-2.3-3).

Table G-2.3-3 Housing suitability (2021).

Indicator	LAA					RAA	NL
	Sunnyside	Come by Chance	Arnold's Cove	Southern Harbour	Clarenville		
Suitable housing (%)	100.0	100.0	100.0	100.0	98.4	98.3	98.3
Unsuitable housing (%)	0.0	0.0	0.0	0.0	1.6	1.7	1.7
In need of major repairs (%)	0.0	0.0	2.3	14.8	2.5	4.7	5.5
Average household size (people) (%)	2.2	2.3	2.2	2.1	2.5	2.3	2.3
Multigenerational households (%) ⁹	0.0	0.0	0.0	0.0	1.8	2.0	2.0
5 or more people within a household (%)	5.3	5.6	2.3	0.0	3.9	4.3	4.2

Source: (Statistics Canada, 2019, 2023a)

Notes

⁹ "Multigenerational households represent all households where there is at least one person who is both the grandparent of a person in the household and the parent of another person in the same household. They also represent all households where there is at least one person who is both the child of a person in the household and the grandchild of another person in the same household." (Statistics Canada, 2023a).

Households in core housing need live in unsuitable, inadequate or unaffordable dwellings and cannot afford alternative housing in their community (Statistics Canada, 2023a). Renters in Canada are more than four times as likely to be in core housing need than homeowners, core housing needs are higher in urban areas and more than one in 10 households has more than one housing challenge (e.g., financial, repairs, crowding) (Statistics Canada, 2023a). In NL, 4% of owner households were in core housing need in 2021 and renters at 20.8% were five times as likely to be in core housing need.

2.3.2.1 Housing Cost and Affordability

For NL, the average value of dwellings increased by 3.5% from 2016 to in 2021 (Statistics Canada 2019, 2023a). Housing units are more affordable in Sunnyside, Come By Chance and Arnold's Cove compared to Clarenville, the Eastern Region and NL (Table G-2.3-4). This is likely because housing values tend to be higher in the Northeast Avalon region, which includes St. John's and suburban communities.

Table G-2.3-4 Housing value and monthly costs.

Indicator	LAA						RAA Eastern Region	NL
	Sunnyside	Come By Chance	Arnold's Cove	Southern Harbour	Clarenville			
Median value of dwellings (\$)	150,000	150,000	150,000	100,000	250,000	276,000	240,000	
Median monthly shelter costs for owned dwellings (\$)	500	650	508	424	1100	930	750	
Median monthly shelter costs for rented dwellings (\$)	N/A	N/A	700	N/A	830	910	870	

Source: (Statistics Canada, 2019, 2023a)

Notes

N/A = Not applicable.

Despite the increase in housing value and rents in NL, the proportion of people spending 30% or more of their income on housing decreased between 2016 and 2021 (Table G-2.3-5). Unlike the rest of the Province, few or none (0%) of the residents of Arnold's Cove and Southern Harbour spent 30% or more of their income on housing. Arnold's Cove has a higher percentage of tenant households living in subsidized housing, which may be because the community has publicly funded housing. In 2021, 40.0% of tenant households in Arnold's Cove received housing subsidies, compared to 11.5% in Clarenville, 18.8% in the Eastern Region and 19.6% in NL.

Table G-2.3-5 Housing affordability.

Indicator	LAA						RAA Eastern Region	NL
	Sunnyside	Come By Chance	Arnold's Cove	Southern Harbour	Clarenville			
Owner households spending 30% or more of income on shelter (%)	15.8	N/A	0.0	0.0	9.5	10.4	8.9	
Tenant households spending 30% or more of income on shelter (%)	0.0	N/A	25.0	0.0	37.6	33.5	32.5	
Tenant households in subsidized housing (%)	0.0	N/A	40.0	NA	11.5	18.8	19.6	

Source: (Statistics Canada, 2019, 2023a)

Notes

N/A = Not applicable.

2.3.3 Short-Term Accommodations

NL Tourism lists nearly 400 facilities offering short-term accommodations in the Eastern Region including more than 100 in St. John's (NL Tourism, 2025). In St. John's, larger hotels are operated by brands (e.g., Best Western, Marriott, Delta, DoubleTree, Hilton, Holiday Inn, Ramada and Sheraton) that often support business travellers. Boutique hotels and small inns tend to cater to vacationers. Short-term rentals in

private housing are also available but may not be comprehensively listed on the provincial tourism website.

Various accommodation options are available in the LAA with the most capacity for business travellers in Clarenville and Arnold's Cove (Table G-2.3-6) (NL Tourism, 2025). Other facilities are in nearby communities (e.g., Goobies, Gin Cove, George's Brook and Swift Current). Campgrounds and Recreational Vehicle (RV) parks are presented separately in the Land and Resource Use Baseline Study.

Table G-2.3-6 Short-term accommodations in the LAA.

Name	Location	Capacity
Sunnyside of Life B&B and RV and Tea	Sunnyside	4 bedrooms
Arnold's Cove Inn	Arnold's Cove	23 bedrooms, efficiency units (1- and 2-bedroom units), workcamp accommodations
The Killick Inn & Suites	Arnold's Cove	3 suites
Beachside Suites	Clarenville	2 2-bedroom suites, 1 1-bedroom suite
Clarenville Inn	Clarenville	63 bedrooms, business services centre, meeting facilities
Island View Hospitality Home	Clarenville	3 bedrooms
Quality Hotel	Clarenville	64 bedrooms, business services centre, meeting facilities
Riverview Suites	Clarenville	10 bedrooms
Seacrest Suites	Clarenville	4 two-bedroom suites
The Wave Hotel	Clarenville	46 bedrooms, meeting facilities

Sources: (NL Tourism 2025; Arnold's Cove Inn 2024)

2.3.4 Education and Training

NL Schools operates more than 250 public schools throughout the Province with a 2024-2025 enrolment of over 63,000 English-speaking students (NL Schools, 2025a). Conseil scolaire francophone has six public schools (two in St. John's, two in western Newfoundland and two in Labrador), with a total enrolment of more than 350 students (Conseil scolaire francophone provincial, 2025).

Four schools are in the LAA. Tricentia Academy in Arnold's Cove provides education to Kindergarten to Level 4 students from Arnold's Cove, Sunnyside, Come By Chance, Southern Harbour and other communities (NL Schools, 2025b). Clarenville has three schools (i.e., Riverside Elementary, Clarenville Middle School and Clarenville High School) that serve the town and surrounding areas.

The College of the North Atlantic (CNA) is a public college with 17 campuses in NL, including one in the LAA (Clarenville) and seven others also in the RAA: Bonavista, Burin, Placentia, Carbonear, Seal Cove and two campuses in St. John's (CNA, 2025). Course offerings are diverse throughout the CNA system, with programs in carpentry, college transition, personal care attendant, practical nursing and

steamfitter/pipfitter provided at the Clarenville campus. CNA offers a two-year diploma program in Hydrogen Technician at the Corner Brook campus and a one-year certificate program in Wind Turbine Technician at the Bay St. George campus.

Two private colleges offer post-secondary education in the Eastern Region. Keyin College has five campuses (Keyin College, 2025) in NL with St. John's and Bay Roberts campuses in the RAA. Keyin offers programs in health and personal care, business and applied arts, information technology and adult basic education through in-person and online learning. Adult basic education (ABE) is offered at four sites, none of which are in the LAA.

Academy Canada Career College provides education and training at three campuses in NL (Academy Canada, 2025). Available programs include construction, trades, and mining, justice, business, travel and computers, creative studies, health and personal care, animal care and nature at three campuses including two in St. John's. Academy Canada offers adult basic education at 14 locations including Bonavista, Placentia, Conception Bay South and St. John's in the RAA.

Memorial University of Newfoundland and Labrador (Memorial University), which is the province's only university, has six campuses: three in St. John's and one in each of Corner Brook, Happy Valley-Goose Bay, and Harlow, United Kingdom (Memorial University, 2025a). Memorial offers programs granting certificates, diplomas, and degrees (undergraduate, graduate, and post-graduate) through in-person and online programs. Programs are offered in various faculties and schools (e.g., Arctic and Subarctic Studies, Arts and Social Science, Business Administration, Education, Engineering and Applied Science, Fine Arts, Humanities and Social Sciences, Human Kinetics and Recreation, Maritime Studies, Medicine, Music, Nursing, Ocean Technology, Pharmacy, Science, Science and Environment, Social Work). A French immersion program is offered in Sainte-Pierre-et-Miquelon a French collectivity off the south coast of Newfoundland (Memorial University, 2025b).

2.3.5 Childcare

Childcare is important to economic development, especially for facilitating career engagement by women. The NL Department of Education (NL DE) lists regulated early learning and childcare services including childcare centres, family childcare homes and family childcare agencies. Many are in the RAA, mostly on the Northeast Avalon, however, regulated services are limited in the LAA (NL DE, 2025).

Clarenville has one childcare centre: Discovery Day Care, which operates Monday to Friday with a capacity for 42 children aged 1.5 to 7 (NL DE, 2025). Neighbourhood of Friends Family Resource Centre (FRC) is also in Clarenville with FRC Satellite Locations in Come By Chance and Arnold's Cove, although none provide care for children without parents or guardians present. It is likely that informal childcare arrangements exist with family and/or friends as caregivers.

YMCA offers a pre-kindergarten program on behalf of the Government of NL as part of the Federal-Provincial Early Learning Action Plan (NL DE, 2025). In 2024, the YMCA reported 34 sites were operational and 12 were under development (YMCA, 2024). Twenty operating and eight developing sites are in the RAA with none identified for the LAA.

2.3.6 Health Care and Social Supports

Appropriate access to health care services means getting care at the right time, without financial, organizational or geographic barriers (Canadian Institute for Health Information, 2024). NL Health Services is the direct provider of health care to residents throughout the province on behalf of the NL Department of Health and Community Services (NL Health Services, 2025). The Project is within the Eastern-Rural/Urban Zones.

In the Eastern Region, NL Health Services provides acute care at nine hospitals, nine health centres, eight community services and clinics (Eastern Health, 2025a). Emergency medical services are offered in Clarenville, Bonavista, Carbonear, Placentia, Whitbourne, Old Perlican, St. John's, Bell Island, Burin, St. Lawrence and Grand Bank.

NL Health Services provides integrated road ambulance services through 911, which connects to the Provincial Medical Communications Centre (NL Health Services, 2024). The NL Department of Health and Community Services (NL HCS) provides provincial air ambulance services through two dedicated King Air 350 airplanes and supplementary aircraft along with contracted helicopter services in areas not accessible by fixed wing aircraft (NL HCS, 2024).

While location specific information is not available for the LAA and RAA, the Provincial health care system was rated compared to Canada in 2024 (Canadian Institute for Health Information, 2025). NL performance on availability of a regular health care provider was slightly lower than the Canadian average, while the province rated higher for access to hip fracture surgery. Wait times for mental health counselling were longer in NL. In 2023-2024, children (17 years and younger) in NL faced a median wait time of 62 days for mental health counselling, significantly longer than the national median of 24 days.

2.3.6.1 Social Programs

NL Department of Health and Community Services (through NL Health Services) delivers support programs in addition to and separately from the acute health care system. Publicly funded community-based services are provided in clinics by social workers, counselors, nurses and other health professionals to address promotion and protection of health, and services for mental health and addictions (NL HCS, 2025b).

Services include prenatal and postnatal care, adoptions, child protection and youth corrections (NL HCS, 2025a). Programs address concerns with development/behaviour, disabilities, mental health, communicable diseases, immunization, access to health care and treatment of youth with complex mental health needs. Various programs (e.g., prescription drug plan, dental and vision) are provided to those in need and not covered by private insurance. Advice and referrals are provided through the provincial 811 Healthline service.

Health care programs focus on conditions that affect a large proportion of the population (NL HCS, 2025a). Chronic conditions such as arthritis, cancer, chronic pain, diabetes, heart disease, kidney disease, lung disease and stroke, often share risk factors (e.g., tobacco use, physical inactivity, unhealthy eating, excessive alcohol use).

Care of seniors and persons with disabilities is provided in private homes, personal care homes and long-term care facilities. In the LAA, personal care homes are in Arnold's Cove: Hilltop Manor and Clarenville: Clarenville Retirement Home and Cozy Quarters Retirement Centre (Eastern Health, 2025b). Two long-term care homes are in Clarenville: Dr. A. O'Mahony Memorial Manor and Clarenville Protective Community Residence.

NL Health and Community Services, Mental Health and Addictions Division provides mental health and addiction programs through NL Health Services and community-based organizations (NL HCS, 2025b). Mental health and addiction services in the Eastern Region include Doorways, which offers access to counseling (in-person, by phone or video call) without referral. Free naloxone kits are distributed in case of opioid overdoses (Eastern Health, 2025c). The Mental Health and Addictions Systems Navigator helps individuals find appropriate services. "Bridge the gap" is an online platform offering self-help information, programming and a directory of services, and the 811 Healthline is also available for mental health crises or addictions (2025).

In the LAA, Coish Place in Clarenville, offers outpatient services including for mental health and addictions (Eastern Health, 2021). Services available at Coish Place also include community support programs, renal dialysis, family practice, intervention services.

The NL Department for Children, Seniors and Social Development (NL CSSD) offers services, such as an Income Support Program for low-income individuals and families. Affordable housing and home repairs are provided through NL Housing Corporation (NLHC). The NL CSSD provides loans, grants and scholarships for post-secondary education (NL CSSD, 2024). Employment support is available through Employment Assistance Services, which helps with job search and interview preparation. Legal advice and representation are provided by the Legal Aid Commission. The Child Care Subsidy Program provides financial assistance to allow low-income families to access affordable childcare.

Community-based organizations in the LAA provide services to those in need. For instance, the Salvation Army operates food banks in Clarenville and Arnold's Cove, the latter serving communities on the Isthmus of Avalon (United Way, 2024). Usage data were not available, but food security is most often attributed to having low income and increased cost of living. Food prices have increased and demand at Canada's food banks has peaked to previously unseen levels. In 2024, food bank usage in NL increased by 6% compared to 2023 and by more than 90% since 2019. In NL, an increase of 33% in total visits has been experienced between 2019 and 2024 and more than 44% since 2019 (Food Banks Canada, 2025). However, total visits to food banks in NL decreased by 7.71% between 2023 and 2024 (Food Banks Canada, 2025).

2.3.7 Water and Sewer

The Towns of Sunnyside, Come By Chance, Arnold's Cove, Southern Harbour and Clarenville have provincially protected public water supplies (Table G-2.3-7). In addition, an onsite water supply provides water to the Bull Arm Fabrication facility for potable drinking water, firefighting and industrial use (Oil and Gas Corporation of NL [OilCo], 2022). The PA intersects Sunnyside's provincially protected water supply.

Table G-2.3-7 Provincially protected water supplies (January 20, 2025).

Community	Water Supply Watershed
Sunnyside	Center Cove River
Come By Chance	Butcher's Brook
Arnold's Cove	Steve's Pond
Clarenville	Shoal Harbour River
Southern Harbour	Brigades Pond
Source: (NL Department of Environment and Climate Change [NL DECC], 2025a)	

The Towns of Come By Chance and Clarenville hold permits to operate public drinking water and wastewater systems (NL DECC, 2025b). Both municipalities are licenced to treat and distribute public water. No permits were listed for Sunnyside, Arnold's Cove or Southern Harbour.

2.3.8 Waste Management

The Eastern Regional Service Board (ERSB) provides waste management services to 191 communities in the Eastern Region including Sunnyside, Come By Chance, Arnold's Cove and Southern Harbour (ERSB, 2024). Each household is charged an annual fee for curbside collection of domestic waste, recycling and bulk garbage (seasonal) as well as household hazardous waste collection events. ERSB operates a waste recovery facility at Sunnyside for collection and transport of waste to the Robin Hood Bay regional waste management facility in St. John's (Town of Sunnyside, 2017a).

The Town of Clarenville provides collection services for domestic waste weekly and recycling biweekly with seasonal curbside bulk garbage/metal collection (Town of Clarenville, 2025). The Clarenville waste transfer station, operated by ERSB, accepts waste from commercial haulers and bulk waste from residents for delivery to the Robin Hood Bay waste management facility.

Robin Hood Bay waste management facility is the only landfill in the Eastern Region that accepts domestic and industrial/commercial/institutional waste. The facility, which is owned and operated by the City of St. John's, has a materials recovery facility, drop-off services for residents, municipalities and commercial entities and provides separation of select waste streams such as household hazardous waste, electronics waste, yard waste and natural Christmas trees, paper and cardboard, containers and reusable furniture (Robin Hood Bay, 2024).

Businesses in the LAA are expected to deliver their own waste, or use contracted services (permitted waste haulers), to the Clarenville transfer station or Robin Hood Bay. Both facilities charge the same fees per metric tonne (mt) to commercial operators and municipalities (Table G-2.3-8). Construction and demolition materials may be accepted for free with conditions.

Table G-2.3-8 Clarenville waste transfer station commercial fees (2024-2025).

Waste Type	Fees
Waste disposal permit	\$30.00
Regular waste disposal (mt)	\$90.75
Transportation fee in addition to waste disposal fee	\$25.00
Commingled recyclables (mt)	\$28.75
Rejected wastes or recycling or mixed waste (mt)	\$170.75
Source: (ERSB, 2024)	

Universal Environmental Services Inc. has a waste management certificate of approval to operate a waste management site at Sunnyside for treating contaminated soil (NL DECC, 2024).

2.3.9 Utilities and Communications

Communities in the LAA and RAA receive electrical power through Newfoundland Power or NL Hydro via a system of generating facilities including Holyrood thermal plant and gas turbine plants along with renewable energy sources such as hydro and wind (NL Hydro, 2015). In the Eastern Region, the energy distribution system mainly includes 230 kV lines with a 138 kV system on the Burin Peninsula. Terminal stations are in Clarenville, Sunnyside and Come By Chance and many other communities in the RAA.

Three major service providers (Bell Aliant, Rogers and Eastlink) offer combinations of internet, wireless, mobile, land line telephone, cable/satellite television and home security services to homes and businesses in NL (Bell Aliant, 2025; Rogers, 2025; Eastlink, 2025).

Bell provides internet services throughout Eastern Newfoundland with various service levels in the LAA and RAA (Bell Aliant, 2025). 5G and 5G+ are only offered in communities on the Northeast Avalon including St. John's and surrounding areas from Pouch Cove to Goulds, Conception Bay South, Conception Bay Centre and Conception Bay North. Rogers and Eastlink also provide several internet options though coverage varies by location (Rogers 2025; Eastlink 2025).

Bell, TELUS, Koodo Mobile (owned by TELUS) and Virgin Mobile (owned by Bell) offer the most extensive cellular coverage in Newfoundland with limited service provided by Rogers and Fido (owned by Rogers) (CompareCellular, 2025). Cellular coverage is fair from St. John's to Clarenville but often limited in more remote areas.

In 2024, SaltWire Network, an Atlantic Canadian daily and weekly newspaper publisher, was purchased by United States-based Postmedia (The Canadian Press, 2024) ending daily print newspapers in NL. The Telegram, a province-wide daily print newspaper (originally independent and later purchased by SaltWire), which was part of the purchase by Postmedia, has become a weekly print newspaper with daily online content.

2.3.10 Prevention and Emergency Services

Prevention of crime and safety issues and timely response to incidents require sufficient capacity in services such as policing, fire and emergency medical services. The following sections address policing and fire prevention and response in the Eastern Region. Health emergency response services are described in Section 2.4.6.

2.3.10.1 Policing and Crime

In NL, the Royal Canadian Mounted Police (RCMP) has 42 detachments (RCMP, 2024). The NL headquarters (St. John's) and 11 detachments are in the RAA. The Clarenville detachment is the only one in the LAA. The Royal Newfoundland Constabulary polices the Northeast Avalon portion of the RAA. NL has a lower ratio of police personnel relative to its population compared to the Canadian average (Statistics Canada, 2024b). In 2023, NL had 161.2 police personnel per 100,000 people, while the Canadian average was 178.2 per 100,000.

Most communities in NL do not have municipal enforcement or policing services. Many small municipalities and local service districts have no enforcement capacity.

2.3.10.2 Fire Prevention and Response

In the LAA, fire departments are located at Sunnyside, Come By Chance, Arnold's Cove, Southern Harbour and Clarenville (NL Association of Firefighters, 2025). The Clarenville Fire Department has a professional chief and a volunteer fire fighting team (Town of Clarenville, 2023). Sunnyside, Come By Chance, Arnold's Cove and Southern Harbour have volunteer fire departments (Town of Sunnyside, 2019; Town of Come By Chance, 2025; Town of Arnold's Cove, 2024a; Town of Southern Harbour Volunteer Fire Department, 2025; NL Association of Firefighters, 2025).

A 2015 report on municipal fire protection services in NL (Table G-2.3-9) rated the Arnold's Cove and Clarenville fire departments as Acceptable (includes the ability to have a minimum of six firefighters on scene within 14 minutes, 80% of the time) for offensive interior fire suppression/rescue, meaning firefighters have the training, equipment and resources required to enter a structure and provide search and rescue operations as well as interior fire suppression. The two departments were also rated as Acceptable for ability to provide a defensive exterior response (i.e., the ability to safely commence attack within two minutes after assembling necessary resources on scene, 90% of the time, minimum of four firefighters. Defensive exterior means firefighters do not enter the structure to extinguish a fire or rescue anyone trapped inside (NL Fire and Emergency Services [NL FES], 2015).

Table G-2.3-9 Fire department assessment (2015).

Fire Department	Ratings	
	Offensive Interior	Defensive Exterior
Sunnyside	Needs Improvement	Needs Improvement
Come By Chance	Needs Improvement	Needs Improvement
Arnold's Cove	Acceptable	Acceptable
Southern Harbour	Unacceptable	Needs Improvement
Clarenville	Acceptable	Acceptable

Source: (NL FES, 2015)

2.3.11 Recreation

As small communities, Sunnyside, Come By Chance and Southern Harbour offer limited facilities for sports, recreation and leisure. Along with special events, the communities provide opportunities to participate in a variety of community-based activities and organizations such as choirs, music groups, recreation committees, heritage committees, Scouts, seniors' groups, church groups and service clubs (Town of Sunnyside, 2017b; Town of Come By Chance, 2025; Town of Southern Harbour, 2025). Arnold's Cove and Clarenville have public libraries (NL Public Libraries, 2025).

Similar programs are offered in Arnold's Cove and Clarenville and the larger communities also have additional facilities for sports and recreation. Arnold's Cove has a recreation/community centre, sports

fields and playground with a sliding hill and dog park (Town of Arnold's Cove, 2024b). Clarenville has a multi-purpose event and recreation centre (e.g., ice surface, arena, walking/running track, arts theatre and meeting facilities) as well as Elizabeth Swan Park (chalet pavilion/cookhouse, splash pad, accessible playground, outdoor performance space with seating, accessible paved pathway, beach volleyball court, green space for leisure and special events and a lighted ball field with bleachers). Clarenville sports facilities include fields for softball and soccer.

Hiking trails are in Sunnyside, Come By Chance, Arnold's Cove, Southern Harbour and Clarenville (Town of Arnold's Cove, 2024c; Town of Clarenville, 2025; Town of Sunnyside, 2017b; Town of Come By Chance, 2025; Town of Southern Harbour, 2025). The Clarenville area has access to a multi-use trail system including the T'Railway and other trails suitable for biking, Nordic skiing, snowmobiling and riding ATVs (Discovery Trail Association, 2025). Alpine skiing, snowboarding, Nordic skiing and snowshoeing are available at White Hills Resort in Clarenville (Alpine Development Alliance Corporation, 2024).

3.0 Economy, Employment and Business Baseline

The Economy, Employment and Business Baseline Study characterizes the following:

- The economy of the RAA and the LAA.
- Existing major industries in the RAA and LAA as appropriate.
- Employment in the RAA and LAA.
- Availability of skilled and unskilled construction labour and employment of under-represented groups in the RAA.
- The business and industrial supports in the LAA.

3.1 Methods

Secondary information included government sources (e.g., Statistics Canada, Government of NL, Tourism NL, associations representing economic sectors and geographic business interests and the websites of individual businesses) as well as publicly available data and literature. Statistics Canada is a major source of information on employment and labour. However, the agency suppresses data to protect sensitive information in small communities and to address data quality issues. This can limit the utility of information when dealing with small communities.

3.1.1 Spatial Boundaries

Existing conditions have been described for the area representing the geographic extent over which Project activities, and their effects, are likely to occur. The PA is described in Section 2.1.1.

For the assessment of Project effects on Economy, Employment and Business, the LAA is the Eastern Region (Figure G-3.1-1). The Eastern Region is the area most likely to provide labour, goods and services required for Project construction and operation.

The RAA is the Province of NL as some of the services and infrastructure needed for the Project are not available in the LAA and a portion of the construction workforce is anticipated to come from throughout NL. The province was selected as the RAA given the potential economic effect of the Project (i.e., Gross Domestic Product [GDP]) on the provincial economy.

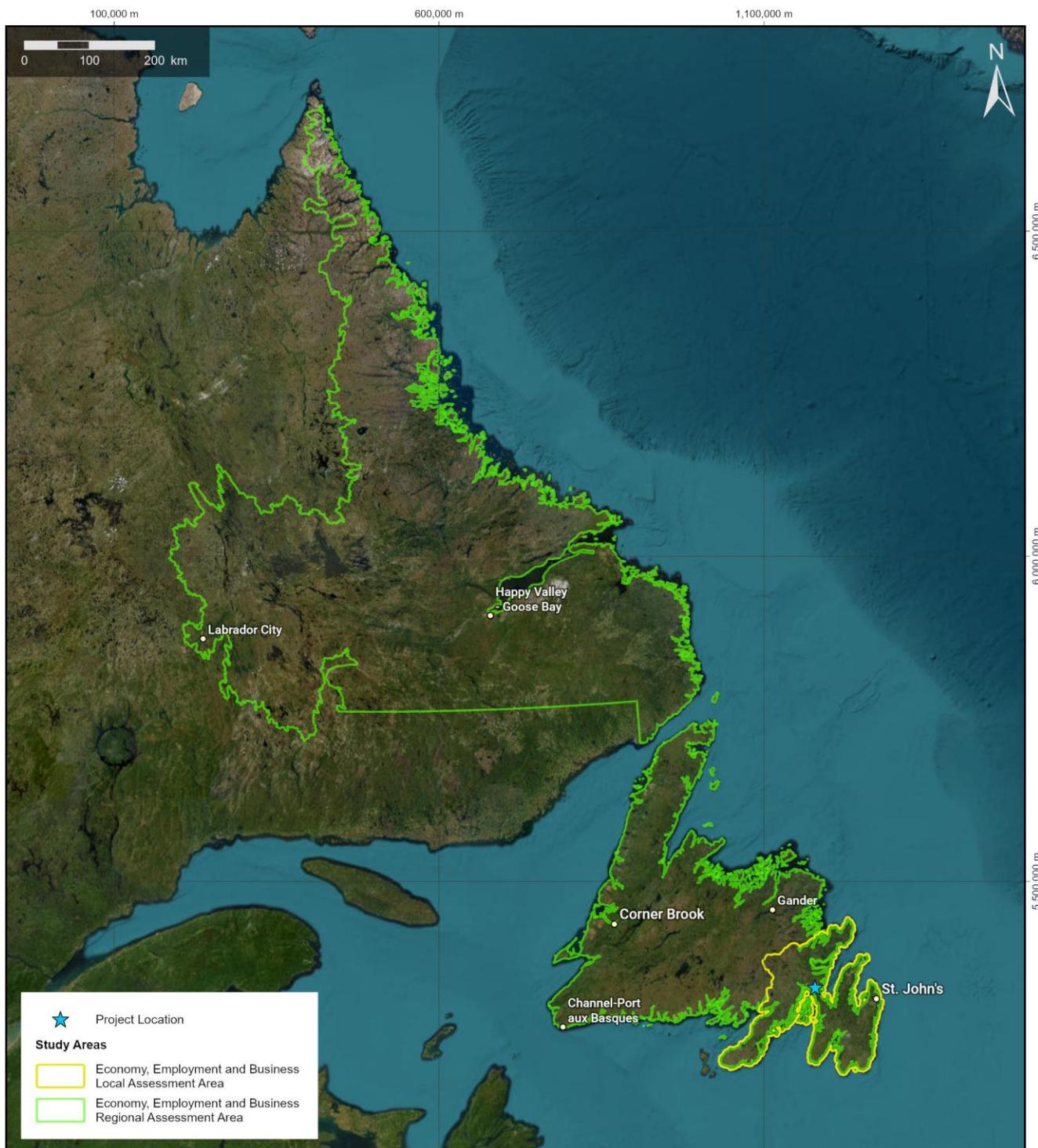


	FIGURE TITLE:	Study Areas: Economy, Employment and Business	NOTES:	PREPARED BY:	DATE:
	PROJECT TITLE:		Contains information licensed under the Open Government Licence - Newfoundland and Labrador	C. Bursey	12/06/2025
				REVIEWED BY:	C. Burke 12/06/2025
				APPROVED BY:	C. Collins 12/06/2025
				CRS:	NAD 1983 CSRS UTM Zone 20N
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SEM MAP ID: 016-015-GIS-540-Rev0

Figure G-3.1-1 Study Areas: Economy, Employment and Business.

3.2 Economy of Newfoundland and Labrador

For analysis purposes, the economy is divided into two main sectors: goods-producing and services-producing. The largest four contributors to NL GDP are “Oil Extraction”, “Finance, Insurance, Real Estate & Business Support Services”, “Health Care and Social Assistance”, and “Public Administration” (Table G-3.2-1). Together, these make up 52.5% of GDP. In 2023, employment in NL increased by 4,200 person-years, or 1.8%, compared to 2022. The four sectors with the highest person-years of employment were “Construction”, “Retail Trade”, “Healthcare and Social Assistance”, and “Public Administration”.

Table G-3.2-1 NL 2023 gross domestic product at basic prices, by industry (millions of chained 2017 dollars).

Indicator	GDP 2022e		Employment 2023	
	Millions (\$)	Total (%)	Person - Years (000s)	Total (%)
Agriculture, Forestry & Logging	197.4	0.5	1.7	0.7
Fishing, Hunting & Trapping	419.1	1.1	2.2	0.9
Mining	2,727.7	7.3	8.1	3.4
Oil Extraction	8,567.6	22.8	2.5	1.1
Support Activities for Oil & Mining	568.2	1.5	3.3	1.4
Manufacturing	1,270.5	3.4	9.5	4.0
Fish Products	441.2	1.2	2.8	1.2
Other	829.4	2.2	6.7	2.8
Construction	2,582.4	6.9	19.5	8.2
Utilities	744.3	2.0	2.5	1.1
Goods-Producing Sector Subtotal	17,073.4	45.4	49.2	20.8
Wholesale Trade	808.2	2.2	5.0	2.1
Retail Trade	1,969.7	5.2	31.6	13.4
Transportation & Warehousing	1,210.4	3.2	12.6	5.3
Finance, Insurance, Real Estate & Business Support Services	5,044.6	13.4	13.1	5.5
Professional, Scientific, & Technical Services	1,435.9	3.8	11.5	4.9
Educational Services	1,984.8	5.3	17.5	7.4
Health Care & Social Assistance	3,131.2	8.3	45.4	19.2
Information, Culture & Recreation	815.7	2.2	7.6	3.2
Accommodation & Food Services	571.4	1.5	14.3	6.0
Public Administration	2,988.4	8.0	21.0	8.9
Other Services	552.6	1.5	8.1	3.4
Services-Producing Sector Subtotal	20,516.6	54.6	187.5	79.2
All Industries	37,590.0	100.0	236.7	100.0

Source: (NLSA, 2024a)

3.2.1 Offshore Oil and Gas

Since Hibernia began production in 1997, offshore oil extraction has been a key industry in NL (Government of NL, 2024a). The oil and gas industry contributed about 16% of the province's real GDP in 2022 and 11.4% of government revenue in the 2022-23 fiscal year. The province has four producing offshore oilfields: Hibernia, Terra Nova, White Rose and Hebron. With the resumption of production at Terra Nova in November 2023 (following completion of asset upgrades), all four fields were producing oil by the end of the year. In 2023, offshore oil production totaled 73.1 million barrels, a 13.3% decline from 2022. In 2022-23, NL accounted for about 5% of Canada's total oil production, behind Alberta (84%) and Saskatchewan (10%).

3.2.2 Mining and Mineral Exploration

The NL mining industry includes mineral exploration and development for minerals such as gold, iron ore, critical minerals (e.g., nickel, copper, cobalt, lithium) and rare earth elements (Government of NL, 2024a). At the end of 2024, mineral shipments of iron ore, nickel, copper, cobalt, limestone, dolomite and barite were estimated to be \$4.56 billion. Along with sale of ore, the mining industry creates employment and stimulates the economy through procurement, community investments and major capital investments such as construction of Calibre Mining Corp.'s Valentine Gold Project. Exploration expenditures were projected to be \$223.2 million in 2024.

Total mining-related employment was approximately 8,500 people in 2023, a decrease of 0.8% from 2022 (Government of NL, 2024a). While employment increased in mineral exploration and at several mines, it was offset by closure or restructuring of other mines.

3.2.3 Manufacturing

In 2023, the NL manufacturing sector experienced decreased activity (Government of NL, 2024a). The total value of manufacturing shipments was \$3.3 billion, down 13.4% from 2022. Shipments of durable goods (e.g., fabricated metal products and refined metals) declined by 18.2%, while export of non-durable goods (e.g., newsprint and seafood) decreased by 9.5%. Manufacturing employment averaged around 9,500 people, a 6.6% decrease compared to 2022.

3.2.4 Major Capital Developments

A large portion of construction industry activity in NL is linked to major capital project development, especially in the non-residential sector (Government of NL, 2024a). In 2023, construction-related

investment was approximately \$6.1 billion, a 5.3% decrease from 2022. However, employment in the NL construction industry increased by 4.8% in 2023 to about 19,500 people (Government of NL, 2024a).

3.2.5 Seafood Harvesting and Processing

Seafood product exports from NL were valued at \$704 million in 2023 (Government of NL, 2024a). Commercial fish landings and landed value decreased compared to 2022, primarily due to lower prices for key species. The aquaculture industry had important increases in production and value in 2023. Employment in fish harvesting, aquaculture hatcheries, grow-out activities and fish processing plants totaled 16,100 individuals, decreased from 17,104 in 2022.

Commercial aquaculture production in NL consists of salmonids including Atlantic salmon and steelhead trout, as well as shellfish such as blue mussels and oysters (Government of NL, 2024a). Total market value increased by 72.4% to \$219.0 million from 2022 to 2023, the highest since 2017. In 2023, salmonid production increased by 82.4% due to a production rebound and the commencement of salmon harvest by Grieg Seafood Newfoundland in Placentia Bay. In 2023, while shellfish production decreased by 14.3%, total value was consistent as market prices for mussels increased. Aquaculture developments continued in the province in 2023 including licencing of operations to grow marine plants (Government of NL, 2024a).

3.2.6 Tourism

The Visitor Profile – Highlights from the 2023 Visitor Exit Survey provides information on the tourism industry. The information is reported for NL and regionally. The Project LAA is encompassed by the Avalon Region and Eastern Region. Detailed information is also provided for the St. John's Area.

NL's tourism infrastructure is well-developed, with significant investments in accommodations and facilities to support both leisure and business travelers. The province welcomed 371,265 non-resident visitors in the first nine months of 2024, a slight decline from the previous year (NL Department of Tourism, Culture, Arts and Recreation, 2024a). The peak travel season from May to October, particularly in July and August, shows a high demand for hospitality services during these months. In 2023, 45% of visitors arrived in July and August. Business visitors were most common in spring (May-June) and autumn (September-October).

Accommodation occupancy rates are used as a tourism activity indicator. The LAA offers various short-term accommodations, including hotels, efficiency apartments, and bed and breakfast guest homes totalling more than 1.5 million rooms across Avalon and the Eastern region in 2023 (Table G-3.2-2).

Table G-3.2-2 Total rooms available per year.

Study Area	Region	2023	2024 (January - October)
LAA	Eastern	262,971	223,914
	Avalon	1,299,809	1,098,490
RAA	NL	2,987,513	1,422,166

Source: (NL Department of Tourism, Culture, Arts, and Recreation, 2024a, 2024b)

In 2023, Avalon Region accommodations had an occupancy rate of 66.48% whereas Eastern Region accommodations had an occupancy rate of 44.60% (NL Department of Tourism, Culture, Arts, and Recreation, 2024b) (Table G-3.2-3). The higher accommodation rates in the Avalon Region can likely be attributed to the presence of St. John's, which has a strong business and conference market compared to other areas of the LAA.

Table G-3.2-3 Annual occupancy rates.

Study Area	Region	2023	2024 (year-to-date October)
LAA	Eastern	44.60%	44.58%
	Avalon	66.48%	62.48%
RAA	NL	57.43%	55.59%

Source: (NL Department of Tourism, Culture, Arts, and Recreation, 2024b)

3.2.7 Real Estate

The NL real estate sector slowed in 2023 after a strong performance in 2022 as home sales declined due to higher interest rates (Government of NL, 2024a). The average annual home price in NL was \$293,573 in 2023, the lowest of all Canadian provinces and unchanged from the previous year. Increased demand for rental properties led to a decrease in the vacancy rate and increased average rent prices. The commercial office vacancy rate in St. John's remained at 19.1% in 2023, unchanged from 2022.

3.2.8 Forestry

In 2023, the NL forestry industry faced challenging market conditions, with declining lumber and paper shipment values due to falling prices and reduced newsprint demand (Government of NL, 2024a). The Annual Allowable Cut (AAC) was reduced, and a spruce budworm infestation resulted in damage to forests despite the application of a spray program.

3.3 Economy of the Eastern Region

Communities throughout the LAA are known for traditional natural resource-based industries (e.g., fishing, seafood processing and forestry) but also for various industrial developments, including those at

Come By Chance, Arnold's Cove, Bull Arm, Long Harbour, Placentia and Marystow. While the Northeast Avalon (metropolitan St. John's) is the main retail, government, commercial and industrial focus of the Eastern Region, other larger communities (e.g., Clarenville, Bay Roberts, Carbonear, Placentia, Bonavista, Marystow) serve as local service centres.

3.3.1 Offshore Oil and Gas

While the NL oil and gas exploration and extraction activities are in the offshore (e.g., Jeanne d'Arc Basin), the four operating projects are supported by industrial facilities and service providers located in the Eastern Region. These include the A. Harvey & Company Ltd. Marine Base Division in St. John's (A. Harvey & Company Ltd., 2025) and the Pennecon Energy (2025) marine terminal in Bay Bulls. Offshore support facilities and services are also provided by the Port of Argentia.

3.3.2 Mining and Mineral Exploration

No mining or exploration activities are in the PA and the “Duck Pond Mine Area” is the only mining interest identified near the Project. Mining related operations in the Eastern Region include the Vale Long Harbour processing facility, the Canada Fluorspar (NL) Inc. developing operation at St. Lawrence on the Burin Peninsula and the Trinity Resources Pyrophyllite mine and processor at Manuels on the Northeast Avalon (Government of NL, 2024b).

3.3.3 Major Capital Projects

In 2023, the Government of NL identified 40 major capital investments ongoing or initiated (Government of NL, 2024c). Planned total spending was approximately \$18.3 B, of which most (\$8.9 B) was in the “Mining and Oil & Gas” category. Thirteen projects were in the Eastern Region, and most were in St. John's. The largest investment was the West White Rose Expansion Project at Argentia (Table G-3.3-1). The Project will create a fixed drilling platform to tie back to existing infrastructure at the White Rose offshore oil field and is planned for completion in 2025 with first oil in 2026.

Table G-3.3-1 Major capital projects in the LAA.

Project	Description	Value (\$M)	Timeline
The Shoppes at Galway, St. John's	590,000 sq. ft of retail buildings	150.0	2017-2035
Memorial University of Newfoundland, St. John's	8,500 sq. ft. Faculty of Engineering and Applied Science research facility	25.5	2019-2024
Health Sciences Centre, St. John's	Redevelopment of the Emergency Department	45.0	2022-2026
West White Rose Project, Placentia	Construction of a fixed drilling platform to expand White Rose offshore oil field	3,400.0 - 3,800.0	2022-2026

Project	Description	Value (\$M)	Timeline
Galway Living-Phase 1, St. John's	500 home residential community	200.0	2016-2035
Apartment building, St. John's	196 residential unit apartment building	90.0	2023-2026
Student housing	Three student apartment buildings	30.0	2024-2025
Canada Games Facility, St. John's	Construction of a Centre of Excellence with athletic training space and teaching space	40.0	2023-2025
St. John's International Airport Authority, St. John's	11 asphalt rehabilitation projects, 10 airside projects and road rehabilitation	28.0	2022-2025
Adult mental health and addictions facility, St. John's	Construction of a new adult mental health and addictions facility	250.0	2018-2024
Refit of Canadian Coast Guard ship Judy LaMarsh, St. John's	Conversion and refit of the ship including accommodation refurbishment and propulsion	34.4	2024-2025
Wastewater Lift Station Replacement, Town of Paradise	Replacement of a lift station	26.0	2023-2025
Wastewater Treatment Plant Upgrades, Town of Paradise	Construction of secondary wastewater treatment plant	25.0	2022-2027
Source: (Government of NL, 2024c)			

3.3.4 Seafood Harvesting and Processing

Many areas of NL were settled based on the fishery and, despite industrial changes and a groundfish moratorium, seafood harvesting and processing still play a notable role in the economy especially in rural areas. Aquaculture is a newer part of the seafood sector.

3.3.4.1 Harvesting

The Fisheries and Oceans Canada (DFO) Small Craft Harbours Program identifies 109 core fishing harbours in the Eastern Region (DFO, 2024). These harbours are critical to the fishing and aquaculture industries. The LAA also has 33 non-core fishing harbours. Most core fishing harbours have been transferred from the Federal Government to local harbour authorities, which manage operations. Arnold's Cove is managed by Harbour Authority of Arnold's Cove and Sunnyside, by Harbour Authority of Sunnyside.

3.3.4.2 Aquaculture

Government of NL data identifies 12 aquaculture licences at nine locations in the Eastern Region (NL Department of Fisheries, Forestry and Agriculture (NL FFA), 2025). In Placentia Bay, five sites are licenced for bivalves: two on Merasheen Island, two on Crawley Island and one on Jerseyman Island. In Trinity Bay, two sites at Northwest Arm are licenced for bivalves. A site at O'Donnell's, St. Mary's Bay is licenced for bivalves. Unspecified sites are on Heart's Ease Inlet (two licences) and at Bay Bulls, south of St. John's. Land-based sites are located at Murray's Pond in Portugal Cove and at Lester Farms Inc. in Mount Pearl.

3.3.4.3 Seafood Processing

Seafood processing facilities are located throughout coastal areas. In 2024, information from the Government of NL and the Association of Seafood Producers identified 10 processors operating at 15 locations in the LAA (Table G-3.3-2). Products include shellfish, groundfish, pelagic species and others.

Table G-3.3-2 Seafood processors in the LAA (2023/2024).

Producer	Location(s)	Products
Aqua Crab Producers	Aquaforte	Snow crab
Avalon Ocean Products Limited	Fairhaven	Lobster, skate
Barry Group	Port de Grave Witless Bay	Atlantic cod, capelin, snow crab, fish meal, fish oil, Greenland halibut (turbot), herring, lobster, mackerel, blue mussels, redfish (ocean perch), coldwater shrimp (northern), squid
Bay Roberts Seafoods Ltd.	Bay Roberts	Atlantic cod, capelin, flounder/sole, herring, lobster, mackerel, squid
Dandy Dan's	Ship Harbour	Atlantic cod
Golden Shell Fisheries	Hickman's Harbour	Atlantic cod, Atlantic halibut, capelin, snow crab, flounder/sole, Greenland halibut (turbot), haddock, hake, herring, lobster, lumpfish roe, mackerel, monkfish, pollock, redfish (ocean perch), sea cucumber, skate, whelk
Green Seafoods	Winterton	Blue mussels, sea cucumber, snow crab, whelk
Icewater Seafoods Inc.	Arnold's Cove	Atlantic cod
Independent Fish Harvesters Inc.	Brigus	Atlantic cod, haddock, hake, pollock, snow crab
Ocean Choice International	Bonavista Summerville Lawn St. Lawrence	Atlantic cod, capelin, coldwater shrimp (northern), flounder/sole, Greenland halibut (turbot), haddock, hake, halibut, lobster, mackerel, redfish (ocean perch), scallops, sea cucumber, snow crab, squid
Quinlan Brothers	Old Perlican Bay de Verde	Atlantic cod, Atlantic halibut, capelin, Greenland halibut (turbot), herring, lumpfish roe, mackerel, redfish (ocean perch), snow crab, squid, whelk

Sources: (Association of Seafood Producers 2022; NL FFA, 2024)

3.3.5 Tourism

NL offers various types of attractions for visitors. Popular attractions in the Eastern Region are identified in Table G-3.3-3. The table shows the percentage of parties who visited the attraction while in each area.

Table G-3.3-3 Popular attractions in the LAA (2023).

Tourism Region within LAA	Attraction	% of Parties who Visited the Region	Type of Attraction
Avalon Region	Brigus	38%	Small community
	East Coast Trail	30%	Hiking/walking
	Bay Roberts	30%	Small community
	Colony of Avalon	26%	Historic site
	Witless Bay Ecological Reserve boat tour	18%	Sightseeing/wildlife boat tour
	Cupids	17%	Historic site
	Cape St. Mary's	17%	Coastal site/seabird watching
	Castle Hill National Historic Site	11%	Historic site
	Mistaken Point	11%	Ecological reserve
	Bell Island	9%	Small community
Eastern Region	Bonavista	62%	Small community
	Cape Bonavista Lighthouse	51%	Lighthouse
	Trinity	50%	Small community
	Elliston	44%	Small community
	Clarenville	44%	Small community
	Skerwink Trail	23%	Hiking/walking
	Other hiking/walking trails	28%	Hiking/walking
	Port Union	14%	Historic site
	Whale watching/iceberg boat tour	13%	Whale watching/iceberg boat
	Marystown	12%	Small community
St John's Area	Downtown St. John's	92%	City
	Signal Hill	75%	Historic site
	Quidi Vidi Village	57%	Small community
	Cape Spear	54%	Small community/ lighthouse
	George Street	53%	Nightlife/pubs/live music
	City hiking/walking trails	33%	Hiking/walking
	Downtown Pedestrian Mall	31%	Shopping/local cuisine
	Petty Harbour	30%	Small communities
	The Rooms	27%	Provincial museum, archives, art gallery
	City parks	23%	Park

Source: (NL Department of Tourism, Culture, Arts, and Recreation, 2024a)

The five most popular outdoor experiences in 2023 for visitors to NL were walking and hiking, coastal sightseeing, visiting a beach, seabird watching and whale watching experiences (NL Department of Tourism, Culture, Arts, and Recreation, 2024a). The top five most popular culture and heritage experiences in 2023 were enjoying the local cuisine, exploring small communities, connecting with locals, historic sites and museums and lighthouse.

3.3.6 Industrial Development

The following sections describe industrial developments in the Eastern Region with a focus on those nearest to the Project. The Isthmus of Avalon has a strong economy especially given the activities at Come By Chance and Arnold's Cove.

3.3.6.1 Universal Environmental Services Inc.

Universal Environmental Services Inc. operates a contaminated soil remediation facility at Sunnyside (Universal Environmental Services Inc., 2024). The company has a certificate of approval for bioremediation of petroleum contaminated soil, bioremediation of non-hazardous drilling muds, soil washing and surfactant technology for Bunker C and polycyclic aromatic hydrocarbons contaminated soils and chemical stabilization/solidification of soil contaminated with lead and heavy metals (NL DECC, 2020).

3.3.6.2 Bull Arm Fabrication Site

The Bull Arm Fabrication Site, near Sunnyside is owned by the Government of NL and operated by Bull Arm Fabrication Inc. (BAF) a Crown corporation (OilCo, n.d.). BAF, which provides management and maintenance services, leases, all or portions of the facility to industrial tenants. BAF provides construction, maintenance, inspection, fabrication, load-out, assembly, manufacturing and supply servicing for large scale projects, including major portions of the Hibernia, Terra Nova, White Rose and Hebron offshore construction projects. With more than 500 m of deep water berthing for multiple vessels, BAF has the capacity to accommodate multiple vessels and offshore installations at once.

3.3.6.3 North Atlantic Storage and Shipping Terminal

North Atlantic operates a storage and shipping terminal (year-round ice-free port) at Come By Chance (North Atlantic, 2024). The terminal's three berths, with depths of up to 30 m, can accommodate tankers of up to 326,000 deadweight ton (DWT) capacity. The tank farm has a total capacity of 4.3 million barrels of liquid storage.

3.3.6.4 Braya Renewable Fuels

In February 2024, Braya began commercial production of approximately 18,000 barrels per day of second-generation biofuels (derived from vegetable oil, used cooking oil and animal fat) as renewable diesel and sustainable aviation fuel at its Come By Chance terminal (Braya Renewable Fuels, 2024). These products, which are chemically identical to the petroleum products they replace, support energy transition in sectors such as aviation, heavy industry and heavy-duty transport. Braya has announced its intention to work with industry partners on the joint development of 35,000 mt per year of green hydrogen for the biofuels refinery and production of green hydrogen for global markets (Braya Renewable Fuels,

2023). In January 2025 (due to lower than anticipated margins), Braya announced a temporary shutdown without identifying a reopening date (VOCM News, 2025).

The Braya facility is on the brownfield site of the former Come By Chance oil terminal, which achieved first oil in 1973 (Town of Come By Chance, 2024). The 16,000 cubic metres per day facility included the terminal, crude oil storage tanks, a railway spur and a deep-water marine terminal. The oil terminal changed ownership several times and was idled in 2021 before it was purchased in 2021 by United States' private equity firm Cresta Fund Management and financial partners to establish Braya (CBC News, 2021).

3.3.6.5 IMTT Newfoundland Transshipment Terminal Ltd.

The International-Matex Tank Terminals (IMTT) Newfoundland Transshipment Limited (NTL) has served the offshore oil industry since 1998 through its transshipment terminal at Whiffen Head, Placentia Bay (Newfoundland Transshipment Limited, 2024). Crude from offshore oil producers (i.e., Hibernia, Terra Nova, White Rose and Hebron) is shipped by a fleet of three Suezmax shuttle tankers to jetties at the terminal and stored in six 500,000-barrel tanks until it is delivered to market by smaller conventional tankers. The transshipment terminal is partially located within the boundaries of towns of Come By Chance and Arnold's Cove (Town of Come By Chance, 2024).

3.3.6.6 Arnold's Cove Industrial Park

The Arnold's Cove Industrial Park has 18 development lots several of which have been sold (Town of Arnold's Cove, 2024d). The Industrial Park is near IMTT NTL at Whiffen Head (1.8 km), Braya Renewable Fuels (3.8 km) and the Bull Arm Fabrication Site (5.6 km).

3.3.6.7 Long Harbour Processing Plant

The Vale NL Long Harbour Processing Plant (LHPP) processes nickel concentrate from the Voisey's Bay mine into finished nickel, copper and cobalt products (Vale, 2025). Vale developed the hydrometallurgical process for this plant, investing \$200 million in research and development at a separate site before building the commercial facility at Long Harbour (Vale, 2025).

3.3.6.8 Long Harbour Industrial Supply Park

The Long Harbour Development Corporation (LHDC) is a non-profit agency established to maximize opportunities associated with the Vale LHPP and other regional industrial activities. LHDC has approximately 20 acres of developed land in its Industrial Supply Park adjacent to the LHPP (LHDC, 2021).

3.3.6.9 Port of Argentia Industrial Park

The Port of Argentia (PoA) industrial park has about 40 businesses offering a variety of services (PoA, 2024a). Along with serving its tenants, PoA is focused on expansion and new developments in marshalling, renewable energy, aquaculture, offshore energy and critical minerals. Existing port facilities and capabilities include: a 3 km ice-free, deep-water harbour with a wide turning basin; more than 630 m of docking facilities with up to 11 m of draft; pilotage services; a 40- hectares (ha) secure marine terminal with a quayside storage yard; extensive land zoned for industrial use; and 70 hectares of paved runways currently dedicated as a monopile marshalling port.

The PoA and its tenants have the capability to support heavy industry. Existing services include marine transportation, commercial vessel charters, cargo and tug vessel services, remotely operated vehicle services, logistics, stevedoring, warehousing, container trucking, construction, crane services, fabrication of piping and structural steel, supply of mobile office trailers and buildings, concrete products and services, building materials supply, metal salvage and recycling, security systems and services, industrial chemicals and other services (PoA, 2024a).

The Cooper Cove Marine Terminal Expansion Project is a \$100 million investment to improve dock facilities and create additional laydown space at the PoA. The expansion will double quayside capacity by adding three new berths with water depths of 12.5 m and create 10 ha of laydown space. A key focus of the Project is on decarbonization and electrification of port facilities. The expansion is expected to generate significant employment opportunities, with an estimated 670 person-years of employment in NL (PoA, 2024b).

3.3.6.10 Grieg Seafood Newfoundland

Grieg Seafood Newfoundland (GFN) holds 14 aquaculture licences to operate salmon farms in Placentia Bay (Grieg Seafood Newfoundland, 2020). Six sites are on the Burin Peninsula side of the Bay from Red Harbour to Paradise Sound, four in the Western Channel and four around Merasheen Island and Red Island. GFN's initial facilities in Marystown officially opened in 2022 and the first salmon were harvested in 2023, when GFN also began construction of expanded facilities (Grieg Seafood Newfoundland, 2025). Construction of the foundation and groundwork was completed for the post-smolt facility in April 2024. However, construction work was halted in December until spring of 2025.

3.3.6.11 Marbase Marystown Inc.

The former Marystown shipyard, a 30-acre industrial site, was purchased by Marbase Marystown in 2019, with a plan to redevelop the property as a service and supply centre for the aquaculture industry (CBC News, 2023). The project would include an aquaculture service hub (i.e., salmon feed production and storage, construction, repair, decommissioning and disposal of barges, cages and aquaculture vessels, rental space for suppliers, diving services, aquaculture net washing/repair/ recycling) and a lumpfish

hatchery to produce lumpfish in land-based tanks for the purpose of providing a natural, biological control for sea lice in Atlantic salmon farming (Marbase Marystown Inc., 2019). The project is not advancing as quickly as proposed (CBC News, 2023).

3.4 Employment

Based on the size of the labour force, the most important industries (North American Industry Classification System [NAICS], 2017) in the Eastern Region and NL in 2021 were “Health care and social assistance,” “Retail trade,” “Public administration,” “Construction,” and “Educational services” (Table G-3.4-1). In each jurisdiction, these made up nearly 53% of employment in 2021. In the Eastern Region, a concentration of large organizations in the Northeast Avalon includes provincial government headquarters, medical diagnostic and treatment facilities, post-secondary institutions (e.g., Memorial University, College of the North Atlantic, various private colleges), and businesses employ many people. Representation of men+ and women+ varies by economic sector and often follows gender norms though these are more pronounced in NL compared to the Eastern Region.

Table G-3.4-1 Labour force (%)¹⁰ by industry and gender (2021).

Sector	Eastern Region			NL		
	LAA	Men+	Women+	RAA	Men+	Women+
Agriculture, forestry, fishing and hunting (%)	2.7	4.1	1.4	3.9	5.8	1.9
Mining, quarrying, and oil and gas extraction (%)	3.0	4.8	1.1	4.0	6.6	1.3
Utilities (%)	1.1	1.5	0.7	1.1	1.7	0.6
Construction (%)	8.0	13.9	1.8	8.0	13.9	1.8
Manufacturing (%)	4.7	6.4	2.8	4.8	6.4	3.1
Wholesale trade (%)	2.1	3.1	1.1	2.0	2.9	1.0
Retail trade (%)	12.0	10.7	13.4	12.3	10.7	14.0
Transportation and warehousing (%)	4.5	6.8	2.1	4.9	7.2	2.4
Information and cultural industries (%)	1.4	1.5	1.3	1.1	1.2	1.0
Finance and insurance (%)	2.3	1.6	3.0	1.9	1.2	2.6
Real estate and rental and leasing (%)	1.0	1.2	0.8	0.9	1.0	0.7
Professional, scientific and technical services (%)	6.1	7.1	5.1	4.7	5.4	4.0
Management of companies and enterprises (%)	0.1	0.1	0.1	0.1	0.1	0.1
Administrative and support, waste management and remediation services (%)	3.4	4.1	2.6	3.1	3.6	2.5
Educational services (%)	7.4	4.9	10.0	7.1	4.5	9.7
Health care and social assistance (%)	15.7	5.6	26.0	16.5	5.6	27.9

Sector	Eastern Region			NL		
	LAA	Men+	Women+	RAA	Men+	Women+
Arts, entertainment and recreation (%)	1.7	1.6	1.7	1.5	1.5	1.6
Accommodation and food services (%)	6.5	5.4	7.7	6.3	4.9	7.8
Other services (except public administration) (%)	4.2	3.9	4.5	4.1	3.8	4.3
Public administration (%)	9.7	8.9	10.5	8.9	8.8	9.1
Other ¹¹	2.7	3.0	2.4	2.8	3.1	2.6

Source: (Statistics Canada, 2023a)

Notes

¹⁰ The proportion of individuals aged 15 and older in the labour force who have been employed at any time between January 1, 2020, and May 8, 2021.

¹¹ Includes unemployed persons aged 15 years and over who have never worked for pay or in self-employment, or who had last worked prior to January 1, 2020.

3.4.1 Labour Force Characteristics

In 2020, employment rates in the LAA and RAA was similar for men+ and women+ (Table G-3.4-2). The unemployment rate for women+ was 5% lower than for men+ in the Eastern Region and 5.6% lower in NL. Men+ were more likely to be engaged in part-time, casual, short-term or seasonal work, and women+ were more likely to be employed in full-time, year-round and permanent positions in both jurisdictions. This could be attributed to higher participation of men+ in the construction (short-term) and fishing (seasonal) industries. The rate of self-employment is relatively low for the overall population but remains three times higher for men+ than women+.

Table G-3.4-2 Labour force and employment (2021).

Indicator	LAA		RAA	
	Eastern Region		NL	
	Men+	Women+	Men+	Women+
Labour force participation rate (%)	61.7	56.3	58.6	53.7
Employment rate (%)	52.1	50.4	48.1	47.0
Unemployment rate (%)	15.5	10.5	18.0	12.4
Worked full year full time (%)	31.6	29.3	28.2	26.8
Worked part of year and/or part time (%)	31.1	27.6	32.2	28.2
Permanent position (%)	61.6	67.6	59.8	66.5
Casual, seasonal or short-term position (less than 1 year) (%)	19.9	16.0	23.0	18.3
Self-employed (%)	10.2	7.2	9.4	6.5

Source: (Statistics Canada, 2023a)

3.4.2 Working Age Population

Analysis of population age is useful to identify community needs and understand the availability of an adequate workforce (generally 15 and 64 years) for potential projects and supporting industries. Table G-3.4.3 shows the percentage of individuals in the working age group, as well as various cohorts. The largest cohort for all three jurisdictions is 50 to 64 years reflecting an ageing workforce.

Table G-3.4-3 Population cohorts (2021).

Cohort (years)	Eastern Region	NL
15 to 64 (%)	64.4	63.0
20 to 34 (%)	16.9	15.4
35 to 49 (%)	19.4	18.6
50 to 64 (%)	23.2	24.1

Source: (Statistics Canada, 2023a)

3.4.3 Availability of Skilled and Unskilled Labour

Due to low birth rates and out-migration, the populations of the jurisdictions examined are aging and showing little growth. NL's population in general is aging, with those over 65 expected to increase from 24% in 2023 to 27% by 2033 (BuildForce Canada, 2024). The share of younger workers (age 15-24) is expected to remain at 11% over the same period. Labour force recruitment will be challenging as retirements outpace new workers, increasing competition for younger employees.

Workers in NL may commute long distances for work including daily commutes to and from St. John's and other parts of the Eastern Region. In the 2021 census, more than 17% of workers in both the Eastern Region and NL indicated they commute more than 30 minutes for work (Statistics Canada, 2023a). More than 80% of workers indicated they commute as the driver of a vehicle.

In the absence of natural population growth, stability is sustained by immigration and in-migration (e.g., post-secondary students, retirees and remote workers) from other provinces (BuildForce Canada, 2024). In 2023, NL experienced a significant influx of permanent and non-permanent residents included students who may remain in the Province post-graduation. Future growth will depend on immigration to ease labour market pressures.

The BuildForce Canada 10-year (2024-2033) construction workforce outlook for NL forecasts 5,900 retirements and 4,000 new entrants for a loss of 400 (2.3%) workers (BuildForce Canada, 2024). BuildForce provides information for both the residential and non-residential construction markets. The non-residential market is generally expected to grow based on a planned major hydrogen development,

a large provincial road-improvement program and commencement of work on the Bay du Nord offshore oil and gas project.

Employment in the NL non-residential construction sector increased from 2022 to 2023 due to post-pandemic commercial recovery, ongoing institutional projects and the restart of construction at the West White Rose construction project (BuildForce Canada, 2024). Some capital investment eased in 2023, resulting in a more balanced situation for many trades and occupations.

Table G-3.4-4 shows anticipated demand in the non-residential construction market by trade or occupation. Weaker labour markets are anticipated for many trades beginning in 2026-2027. However, companies engaged in heavy-industrial activities could still experience labour shortages. Labour markets for most trades are expected to weaken by 2031. However, this forecast is longer range and several proposed large-scale resource projects (e.g., hydrogen, mining) could be under development at that time.

Table G-3.4-4 Non-residential construction market rankings, NL (adapted from BuildForce Canada, 2024).

Trade or Occupation	2023-2033										
	'23	'24	'25	'26	'27	'28	'29	'30	'31	'32	'33
Boilermaker	4 ¹²	4	4	3	3	3	3	3	3	3	3
Carpenter	4	4	3	3	3	3	3	4	3	3	3
Concrete finisher	3 ¹³	3	3	3	3	3	3	3	3	3	3
Construction manager	4	4	4	4	4	3	3	3	3	3	3
Construction millwright and industrial mechanic	4	4	4	3	3	5	4	5	3	3	3
Contractor and supervisor	4	4	4	4	4	4	3	3	3	3	3
Crane operator	5 ¹⁴	4	4	3	3	3	3	3	3	3	3
Electrical power line and cable worker	4	4	4	3	3	3	3	3	3	3	3
Electrician	4	4	4	3	3	3	3	3	3	3	3
Heavy equipment operator (except crane)	4	4	4	3	3	3	3	3	3	3	3
Heavy-duty equipment mechanic	4	4	4	3	3	3	3	3	3	3	3
Insulator	4	4	4	3	3	3	3	3	3	3	3
Ironworker and structural metal fabricator	5	4	3	3	3	5	4	3	3	3	3
Painter and decorator (except interior decorator)	4	3	3	3	3	4	4	3	3	3	3
Plumber	4	4	4	3	4	4	3	3	3	3	3
Refrigeration and air conditioning mechanic	4	3	3	3	4	4	4	4	3	3	3
Sheet metal worker	4	4	4	3	3	4	3	3	3	3	3
Steamfitter, pipefitter and sprinkler system installer	4	3	3	3	3	4	4	3	3	3	3
Trades helper and labourer	4	4	3	3	3	3	3	3	3	3	3
Truck driver	4	4	4	3	3	3	3	3	3	3	3
Welder and related machine operator	4	4	3	3	3	4	4	3	2 ¹⁵	3	3

Source: (BuildForce Canada, 2024)

Notes

¹² 4: Workers meeting employer qualifications are generally not available in local markets to meet any increase. Employers will need to compete to attract additional workers. Recruiting and mobility may extend beyond traditional sources and practices.

¹³ 3: The availability of workers meeting employer qualifications in the local market may be limited by large projects, plant shutdowns or other short-term increases in demand. Employers may need to compete to attract needed workers. Established patterns of recruiting and mobility are sufficient to meet job requirements.

¹⁴ 5: Needed workers meeting employer qualifications are not available in local markets to meet current demand so that projects or production may be delayed or deferred. There is excess demand, competition is intense and recruiting reaches to remote markets.

¹⁵ 2: Workers meeting employer qualifications are available in local markets to meet an increase in demand at the current offered rate of compensation and other working conditions.

As the retirement rate increases over the next decade in NL, it is anticipated that competition for younger workers will be intense (BuildForce Canada, 2024). The construction industry and other sectors will need to expand recruitment programs to succeed in attracting workers. Recruitment of individuals from groups (e.g., women, Indigenous peoples and immigrants) who have been traditionally under-represented in the construction sector would have a positive effect on labour supply.

In 2023, about 2,710 women were employed in the NL construction industry, with 29% working on site and 71% in administrative roles (BuildForce Canada, 2024). Women made up 790 of the 16,900 tradespeople across all sectors. They were more represented in non-residential construction and new housing, making up nearly 6% of the workforce. The top trades for women were electrician (34%), trade helper and labourer (32%), construction manager (11%), carpenter (8%) and contractor or supervisor (6%).

In 2021, Indigenous workers accounted for approximately 9% of the NL construction labour force (BuildForce Canada, 2024), which was consistent with 2016 employment in construction. However, the general labour force had increased its share of Indigenous workers from 2016 to 2021.

As of 2022, new Canadians accounted for approximately 6% of NL's workforce. While NL has been successful in attracting and integrating immigrants, the share of immigrants in the NL workforce is below that of the Canadian average (BuildForce Canada, 2024). In 2022, the proportion of immigrants (1.3%) in the NL construction labour force was less than 25% of the immigrant share in the general NL labour force. NL is anticipated to receive 51,300 new immigrants between 2024 and 2033, who will make up an increasing share of the NL working-age population.

3.4.4 Gender Wage Gap

In 2021, the NL gender wage gap was \$7,400 (Statistics Canada, 2023a). Data for the LAA and RAA show an after-tax wage gap between men+ and women+ with the largest gap observed in Sunnyside at \$13,000. The data highlight the persistent disparity in earnings between genders.

Table G-3.4-5 Gender wage gap (2021).

Indicator		LAA					RAA	NL
		Sunnyside	Come By Chance	Arnold's Cove	Southern Harbour	Clarenville		
Median after-tax income in 2020 (\$)	Men+	37,200	NA	38,800	35,600	39,600	38,400	37,200
	Women+	24,200	NA	28,600	27,400	30,000	31,600	29,800
Wage gap (\$)		13,000	NA	10,200	8,200	9,600	6,800	7,400

Source: (Statistics Canada, 2023a)
Notes
N/A = Not applicable.

3.5 Business

According to NL Department of Finance, the Province had 15,299 registered businesses in December 2023. Of these, a high proportion were in three Rural Secretariat Regions (RSR) corresponding to the Eastern Region (Table G-3.5-1). A total of more than 61% of provincially registered businesses were in this area and thus likely located in the LAA.

Table G-3.5-1 Number of businesses in the LAA by rural secretariat region (2024).

Rural Secretariat Region	Number	% of Provincial Total
Clarenville - Bonavista	864	5.6%
Burin Peninsula	476	3.1%
Avalon Peninsula	8,030	52.5%
Total	9,370	61.2%

Source: (NLSA, 2024b)

3.5.1 Business Organizations

This Study identified eight general business organizations (i.e., chambers of commerce or boards of trade) in the Eastern Region representing more than 1,800 members (Table G-3.5-2). Based on the available member databases, these businesses provide industrial services (e.g., heavy and general industry), business services (e.g., financial, legal, information technology, communications), transportation, storage and logistics, safety and security, marine services, consulting and engineering services, construction, travel, accommodations and food services.

Table G-3.5-2 General business development organizations in the LAA.

Organization	Area Served	# Members
Arnold's Cove Area Chamber of Commerce	Isthmus area including Sunnyside, Come By Chance, Arnold's Cove, and Long Harbour, Goobies, Chapel Arm	46

Organization	Area Served	# Members
Clarenville Area Chamber of Commerce	Clarenville and surrounding area	107
Placentia Area Chamber of Commerce	Placentia area including Long Harbour	137
Bonavista-Trinity Regional Chamber of Commerce	Bonavista Peninsula	137
Burin Peninsula Chamber of Commerce	Burin Peninsula	125
Conception Bay Area Chamber of Commerce	Conception Bay South, Conception Bay Centre	197
Mount Pearl-Paradise Chamber of Commerce	Mount Pearl, Paradise	259
St. John's Board of Trade	St. John's	800+

Sources: (Arnold's Cove Area Chamber of Commerce, 2024; Clarenville Area Chamber of Commerce, 2021; Placentia Area Chamber of Commerce, 2020; Bonavista-Trinity Chamber of Commerce, 2022; Burin Peninsula Chamber of Commerce, 2025; Conception Bay Area Chamber of Commerce, 2023; Mount Pearl – Paradise Chamber of Commerce, 2025; St. John's Board of Trade, 2025)

Near the Project, the Arnold's Cove Area Chamber of Commerce includes nearly 50 members, many of whom support the existing industrial facilities at Come By Chance and Arnold's Cove. Come By Chance industrial suppliers include Ameil Constructors Ltd. (2020) (industrial piping, plant fabrication, industrial facility maintenance), Camin Cargo Control (2023) (testing, inspection, fuel additives, sample submission, aviation and sustainable fuels, marine fuel analysis) and Canadian Maritime Agency Ltd. the shipping agent for North Atlantic Storage and Shipping Terminal and IMTT NTL, Ltd.

Clarenville has a larger and more generalized business community. The Clarenville Area Chamber of Commerce lists 107 members (Clarenville Area Chamber of Commerce, 2021). Some of these companies offer services (e.g., industrial manufacturing, equipment rental, consulting engineering, electrical services, accommodations, transportation, carpentry, electrical, food services, financial and legal services, printing, office supplies, information technology, telecommunications, automotive rentals/sales and service) to industry and/or workers.

3.5.2 Industrial Parks

Throughout the LAA, various municipalities and other organizations prepare and supply land to provide opportunities for industrial and commercial development. The nearest industrial parks to the Project are in Arnold's Cove, Long Harbour and Placentia (Section 3.4.6).

Industrial parks and lands are located throughout the Eastern Region in communities such Bay Roberts, Carbonear, Holyrood, Conception Bay South, Paradise and Torbay (Town of Bay Roberts, 2025; Town of Carbonear, 2025; Blue Ocean Developments, 2025; Town of Conception Bay South, 2025; Town of Paradise, 2022; Town of Torbay, 2016). Mount Pearl industrial areas include Donovans Business Park, Beclin Business Park and Kenmount Business Park (City of Mount Pearl, 2019). In St. John's, the main industrial parks and lands are around the Airport and the harbour, Kenmount Road, O'Leary Avenue, Logy Bay Road and East White Hills Road (City of St. John's, 2014).

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