



## **Aviation Technical Subcommittee Highlights of the January 23, 2025, Meeting**

### **Meeting Participants:**

- Kevin Clarke, Maryland Aviation Administration, (MAA)
- Ryan Washington, Metropolitan Washington Airports Authority, (MWAA)
- Glen Warren, Metropolitan Washington Airports Authority, (MWAA)
- Mohammad Khan, Metropolitan Washington Airports Authority, (MWAA)
- Jeff Breeden, Federal Aviation Administration, (FAA)
- Keith Meurlin, Washington Airports Task Force, (WATF)
- Mark Rawlings, District Department of Transportation, (DDOT)
- Victor Henry, Baltimore Metropolitan Council, (BMC)
- Rusty Harrington, Virginia Department of Aviation, (DOAV)

### **TPB Staff:**

- Timothy Canan
- Kenneth Joh
- Suraj Vujjini
- Yu Gao
- Olga Perez
- Zhuo Yang
- Charlene Howard
- Jessica Stark

### **1. WELCOME, INTRODUCTIONS, AND APPROVAL OF HIGHLIGHTS FROM PREVIOUS MEETING (NOVEMBER 21, 2024)**

Mr. Kevin Clarke called the meeting to order at 10:32 A.M. The meeting was conducted virtually by Microsoft Teams teleconference. The highlights of the previous meeting, held November 21, 2024, were approved by the Subcommittee, as written.

### **2. STAFF ANNOUNCEMENTS**

Mr. Canan reported to the Subcommittee that there have been no changes in staffing at COG. He also informed that while some funding details are still being finalized, for now, it would be assumed the same funding levels as in the November draft, with flexibility to adjust if more funds become available. There are no new projects proposed beyond what was already shared. Mr. Breeden added that the reason for this increase is the 2024 FAA reauthorization changed funding amounts under the DC state apportionment, and while final calculations are pending, additional funding is expected to support upcoming projects.

### **3. AIR CARGO ELEMENT UPDATE**

Ms. Perez presented an update on the Air Cargo Element Report, focusing on demand, facilities, ground access, and at-home delivery services at BWI and Dulles Airports. She noted that while national air cargo saw growth in 2023, regional trends declined but are projected to surpass national growth rates in the future. BWI leads in domestic cargo, while Dulles dominates international freight, reflecting their complementary roles in supporting regional cargo needs.

The presentation highlighted the Washington-Baltimore region's strong population and job growth forecasts through 2050, emphasizing the need for continued air cargo capacity to meet increasing demand. Ms. Perez also detailed both airports' current cargo infrastructure and future expansion plans, noting BWI's focus on facility upgrades and Dulles' planned runway and cargo space expansions. The surrounding road networks for both airports were reviewed, showing strong connectivity to support cargo distribution throughout the region.

Ms. Perez concluded by emphasizing the importance of understanding regional and global cargo trends, including the impact of e-commerce, to guide future infrastructure planning. She announced that the draft report is in its final review phase and will be shared with the Aviation Technical Subcommittee for feedback by February 14, with a two-week period for comments. Appreciation was expressed to both airports and her team for their support in compiling the report.

Mr. Clarke suggested that the report could help connect cargo planning with state highway discussions to highlight the need for improving roads around the airports. Ms. Perez explained that the current analysis does not deeply address congestion, focusing instead on identifying the road networks. Mr. Canan acknowledged the concern and suggested that while the report's current presentation is general, it could include language recognizing growing traffic volumes and offer recommendations for improving roadways to ensure efficient cargo transportation. The importance of tying the cargo and road improvement discussions together was emphasized.

#### **4. DISCUSSION ON IN-PERSON MEETING OPTIONS**

A discussion was held regarding the possibility of holding in-person meetings for the Subcommittee, as opposed to continuing with virtual meetings. While virtual meetings provide flexibility, there was a recognition of the value of in-person interaction for better engagement. However, some members expressed concerns about the travel time required, especially for those coming from further locations like Richmond. A suggestion was made to hold one in-person meeting per year with a hybrid option for those unable to attend in person. The next meeting, scheduled for March 27th, was agreed upon to be an in-person meeting with a hybrid option, allowing members to meet face-to-face while also accommodating those who cannot attend in person.

#### **5. REGIONAL AIR PASSENGER SURVEY GEOGRAPHIC FINDINGS**

Mr. Vujjini presented the geographic findings from the 2023 Regional Air Passenger Survey, which was conducted at three major airports: BWI, DCA, and IAD. The survey gathered about 9,600 responses, with around 3,700 of those containing the necessary geographic data for analysis. The geographic report focused on passenger patterns, ground access, and the regional distribution of travelers. The data was divided into 161 aviation analysis zones (AAZ) and grouped into five regional districts to examine how passengers from different areas accessed the airports. Key challenges faced included a low response rate to geographic data questions and the need to suppress certain AAZs with insufficient data.

He added that the geographic analysis showed that most passengers preferred their local airport, with BWI serving the northern and northeastern areas of the air systems planning region,

DCA serving the District of Columbia and surrounding suburbs, and IAD primarily serving Virginia and outlying areas. The passenger origin patterns have remained relatively stable since 2019, with slight variations across different regions. BWI was particularly favored by passengers from the Baltimore Metropolitan area, while IAD was the top choice for passengers from the Virginia suburbs. Additionally, the report highlighted that the median household income in the region was \$121,469, and it showed trends in business versus leisure travel, with business travel decreasing from 35% in 2019 to 30% in 2023.

Ultimately, Mr. Vujjini presented that ground access to the airports was also analyzed, showing that while private cars remained the most popular mode of transportation, ride-sharing services (TNCs) have seen a steady increase, especially in areas surrounding the airports. Public transit usage was low overall, though certain areas, particularly around the Washington Core and Metrorail stations, showed higher transit usage. The report further explored the distribution of passengers by their destination regions, with most international travelers departing from IAD. The next steps include sharing the draft report with the Subcommittee in early March and initiating updates on ground access forecasts.

Mr. Canan added that two draft reports, the Air Cargo Report and the Geographic Findings Report, will be sent for review in the coming weeks. He acknowledged that reviewing both reports could be challenging but assured the Subcommittee that sufficient time would be provided for feedback before finalizing them.

He mentioned that the team is considering either sending the reports sequentially with individual review periods or together with a longer review period. Mr. Canan expressed gratitude for the Subcommittee's time and input in advance.

Mr. Meurlin added that it would be better to send each document for review when ready, which would allow more time for review.

## **6. ROUNDTABLE DISCUSSION**

Mr. Harrington provided several key updates on ongoing initiatives within the Virginia Department of Aviation. He noted that the department is actively monitoring two bills under consideration by the Virginia General Assembly, both of which could significantly impact aviation funding. One bill would affect the Commonwealth Aviation Fund, while another proposes increasing aircraft registration fees from \$5 to \$25 — the first such increase in many years.

Additionally, Mr. Harrington shared that the University of Virginia, with the Department's support, has received a FAST-SAF grant to study Sustainable Aviation Fuel (SAF). The University of Virginia's School of Engineering and Applied Sciences will lead the study, focusing on the feasibility of establishing a SAF supply chain within the state. A related effort, supported by a \$50,000 grant from the Virginia Tobacco Region Revitalization Commission, will explore hydrogen propulsion applications. The Department will participate as part of the Technical Advisory Committee for both initiatives, highlighting growing regional interest in alternative propulsion and fueling systems.

During the discussion, Mr. Clarke shared that Maryland is also exploring SAF under a recent executive order. He emphasized the potential for collaboration between Maryland and Virginia,

noting that regional SAF production and distribution efforts would benefit both states and regional airports like BWI. Mr. Harrington agreed and referenced Virginia's ongoing SAF-related efforts, including prior feedstock studies and ongoing analysis of production challenges. Both agreed on the importance of aligning their respective studies and collaborating on supply chain feasibility, emphasizing that SAF production will likely require a regional approach.

Mr. Harrington also provided updates on other ongoing studies and projects. The department is in the process of updating the Commonwealth's 2010 Navigational Aids (NAVAID) study, which aims to modernize the system and improve service across Virginia. Additionally, an Economic Impact Study has officially launched, with airport visits and surveys underway; it is expected to conclude by the end of the year and is anticipated to be a highly visible and valuable resource. Finally, he announced that a statewide pavement management study is set to begin later this year, with the contractor selection process currently underway.

Mr. Clarke provided an update on developments in Maryland, noting that the state is facing a budget shortfall that may delay some capital projects, including terminal expansions and airfield improvements at BWI due to the lack of matching state funds for federal grants. He also shared that Maryland is exploring the feasibility of Sustainable Aviation Fuel (SAF) through an executive order from the Governor, highlighting potential opportunities to collaborate with Virginia on regional SAF production and distribution. Additionally, Mr. Clarke mentioned that Maryland is assessing the framework for Advanced Air Mobility (AAM) across its airports and recently completed an economic impact study for its 34 public-use airports, with results now available to support policy discussions.

## **7. ADJOURN**

The meeting was adjourned. The next Subcommittee meeting is scheduled for March 27, 2025. It will be held as a hybrid meeting.