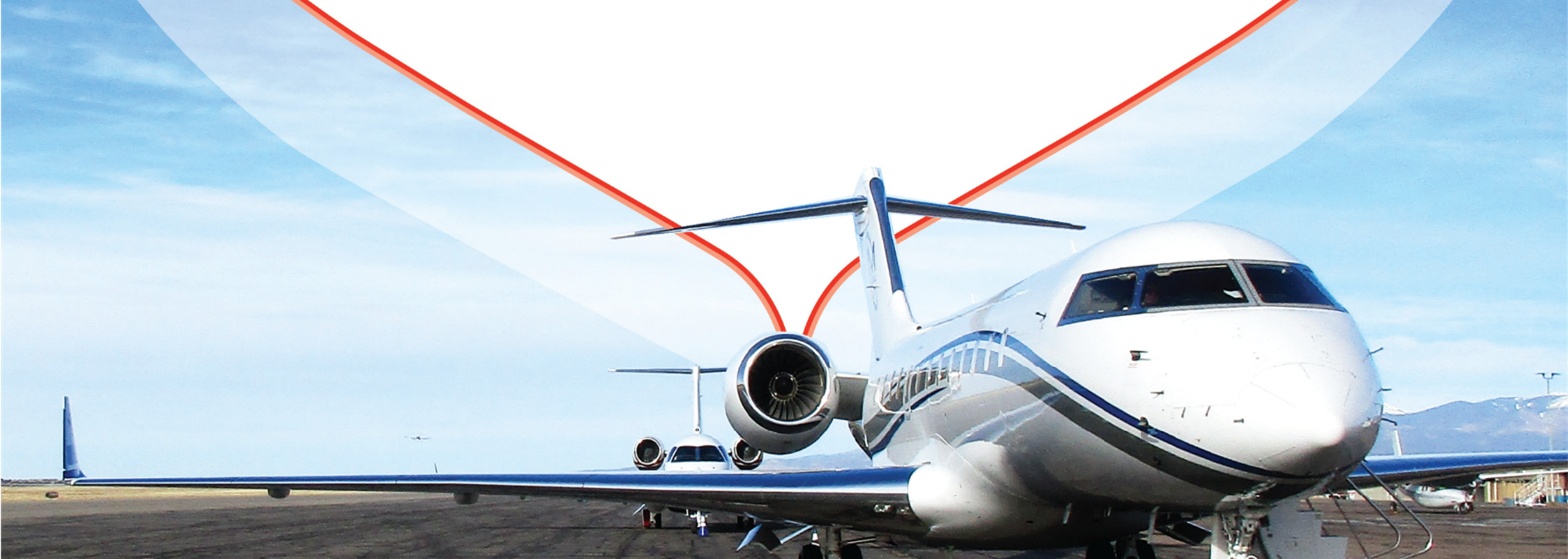
Chapter 2

Aviation Demand Forecasts

Projections of aviation demand will be vital in determining the future needs of the airport. Over the past two decades, the aviation industry has experienced several system shocks, including the Great Recession of 2008–2009, various mergers and acquisitions, transitions in the commercial airline fleet mix, and the COVID-19 pandemic of 2020–2021. Even with all the turmoil in the aviation industry over the years, passenger enplanements at Santa Fe Regional Airport (SAF) have been rising; the 2025 (12 months ending in October) enplanement totals reached a record high. While it is impossible to predict future system shocks, these events typically even out over time. This chapter presents new aviation demand forecasts for SAF.

The Federal Aviation Administration (FAA) has oversight responsibility to review and approve aviation forecasts developed in conjunction with airport planning studies. In addition, aviation activity forecasts may be an important input to future analyses associated with planned airport development.

The FAA is responsible for the review and approval of airport forecasts developed for planning and design, project justification, *National Environmental Policy Act* (NEPA) environmental reviews, benefit-cost analyses (BCAs), and Part 150 Noise Compatibility Planning (NCP). When reviewing a sponsor's forecast, the FAA must ensure the forecast is based on reasonable planning assumptions, uses current data, and is developed using appropriate forecasting methods.



Guidance for the development of FAA-approved aviation demand forecasts is provided in:

- FAA Order 5090.5, *Formulation of the National Plan of Integrated Airport Systems (NPIAS) and the Airports Capital Improvement Plan (ACIP)*; and
- *FAA Memorandum: Forecast Review and Approval Instructions* (dated August 12, 2024).

According to FAA Order 5090.5, forecasts should be:

- Realistic;
- Objective in their reasoning;
- Based on the latest available data;
- Reflective of current conditions at the airport (as a baseline);
- Supported by information in the study; and
- Able to provide adequate justification for airport planning and development.

Ultimately, the forecasts of total passenger enplanements (passenger boardings), total operations, and based aircraft must be compared to the FAA's *Terminal Area Forecast* (TAF) for consistency. The forecasts are considered consistent with the TAF if they meet one of the following criteria:

- Forecasts differ by less than 10 percent in the five-year forecast period and less than 15 percent in the 10-year forecast period
- Forecasts do not affect the timing or scale of an airport project
- Forecasts do not affect the role of the airport as defined in the current version of FAA Order 5090.5, *Formulation of the National Plan of Integrated Airport Systems (NPIAS) and the Airports Capital Improvement Plan (ACIP)*

If the master plan forecast is not consistent with the TAF, differences must be resolved if the forecast is to be used in FAA decision-making, which may involve revisions to the forecasts submitted, adjustments to the TAF, or both. It should be noted that the FAA's forecast approval is limited to the 10-year outlook period, unless a longer period is specifically needed for NEPA analysis or a BCA.

The forecasts must also include an analysis of the current critical aircraft, which is the aircraft or family of characteristically similar aircraft that accounts for at least 500 annual operations at the airport, as well as the future critical aircraft. FAA Advisory Circular (AC) 150/5000-17, *Critical Aircraft and Regular Use Determination*, is referenced when conducting the critical aircraft analysis.

Aviation activity can be affected by many influences on the local, regional, and national levels, which makes it virtually impossible to predict year-to-year fluctuations of activity over a 20-year period with any certainty; therefore, it is important to remember that forecasts are intended to serve only as guidelines, and planning must remain flexible enough to respond to a range of unforeseen developments.

The following forecast analysis for SAF was produced following these basic guidelines. Existing forecasts are examined and compared against current and historical activity. Historical aviation activity is then examined along with other factors and trends that can affect demand. The intent is to provide an updated set of aviation demand projections for SAF that will permit airport management to make planning adjustments as necessary to maintain a viable, efficient, and cost-effective facility by planning for appropriate capital improvement projects.

These aviation demand forecasts were prepared in December 2025. The base year is established as 2025; however, data for the full calendar year are not yet available, so some figures represent the most recent 12 calendar months. For example, passenger enplanements reported for the base year of 2025 are represented by the 12-month period ending in October 2025 while airport operations are represented by the 12-month period ending in November 2025. This method of establishing the baseline allows us to use the most current available data for each demand segment.

NATIONAL AVIATION TRENDS

Each year, the FAA updates and publishes a national aviation forecast. Included in this publication are forecasts for the large air carriers, regional/commuter air carriers, general aviation, and FAA workload measures. The forecasts are prepared to meet the budget and planning needs of the FAA and provide information that can be used by state and local authorities, the aviation industry, and the general public. The current edition for the preparation of this chapter is the *FAA Aerospace Forecasts – Fiscal Years* (FY) *2025–2045*. The FAA primarily uses the economic performance of the United States as an indicator of future aviation industry growth. Similar economic analyses are applied to the outlook for aviation growth in international markets. The following discussion is summarized from the *FAA Aerospace Forecast*.

The U.S. commercial air carrier industry experienced a decade of relative stability that extended from the end of the Great Recession in 2009 through the emergence of COVID-19 in 2020. During that period, U.S. airlines revamped their business models to minimize losses by lowering operating costs, eliminating unprofitable routes, and grounding older, less fuel-efficient aircraft. To increase operating revenues, carriers initiated new services customers were willing to purchase and started charging separately for services that were historically bundled in the price of a ticket. The results of these efforts were significant: 2019 marked the eleventh consecutive year of profitability for the U.S. airline industry.

The COVID-19 global pandemic in 2020 systematically ended those years of relative stability. Airline activity and profitability plummeted almost overnight. In response, airlines were forced to cut capacity and costs, which allowed most to weather the storm. Some regional carriers ceased operations as a result of the pandemic, but no mainline carriers did. Some segments of aviation were less impacted; cargo activity surged, boosted by consumer purchases, and general aviation maintained relatively the same activity levels as pre-pandemic. In 2022, leisure travel demand surged for domestic and Latin American destinations, and by 2023, a wider array of accessible destinations opened with a strong demand for flights across the Atlantic. In 2024, the environment continued to shift; passengers changed focus from spending on goods to experiences, ultimately preferring premium and international travel. This resulted in a surge of travel across the Atlantic but suppressed domestic travel, requiring carriers to shift business strategies to accommodate the observed trends. By the end of 2024, the top eight U.S. passenger carriers posted net profits of $6.4 billion, but also losses of $2.0 billion at two of the carriers.

The business changes airlines have implemented over the last few years will continue to shape the industry long into the foreseeable future. Airlines will be smaller due to having retired aircraft and encouraged voluntary employee separations, which has led airlines to transition their respective fleets to newer and more fuel-efficient aircraft to meet current and future demand for travel. Within the industry, there is confidence that U.S. airlines can generate solid returns on capital and sustained profits; however, aviation demand will be driven by economic activity over the long term as the growing U.S. and world economies provide the basis for aviation growth.

Recovery of the general aviation (GA) sector from the impact of the COVID-19 crisis was faster than recovery for the airlines. Private aviation became attractive during the COVID-19 pandemic. While some decline in general aviation activity was observed in 2024, much of the growth experienced in 2020 and 2021 has remained. The FAA is currently observing the highest number of people pursuing aviation and becoming student pilots in the past three decades, alongside the greatest increase in private pilot certifications since 1995.

The active GA fleet is forecasted to increase by 10.6 percent between 2025 and 2045. The turbine aircraft fleet, including rotorcraft, did not show a decline between 2019 and 2023, but experienced rapid growth of 3.6 percent in 2022 and 2.3 percent growth in 2023. This fleet is projected to have an average growth rate of 2.1 percent per year during the forecast period. The total piston fleet (single- and multi-engine piston aircraft, light-sport aircraft, and piston rotorcraft) declined by 1.6 percent between 2019 and 2023 and is estimated to have shrunk by an additional 0.4 percent in 2024. The piston aircraft fleet is projected to decline modestly (0.1 percent annually) over the forecast period. Growth in the GA fleet is expected to occur in turbine aircraft. Despite average annual growth of the active GA fleet between 2023 and 2045 (0.5 percent), the number of GA hours flown is projected to increase by 19 percent during this period (an average of 0.8 percent per year), as growth in turbine, rotorcraft, and experimental hours more than offset declines in fixed-wing piston hours. Over the 20-year forecast period, operations are forecasted to grow 1.1 percent a year, with commercial activity growing at approximately four times the rate of non-commercial (general aviation and military) activity.

Table 2A presents the FAA's national forecasts of aviation activity for demand indicators relevant to activity at SAF. Nationally, passenger enplanements on mainline air carriers rebounded from the COVID-19 pandemic by 2022. Regional carrier enplanements have rebounded, as well, but at a slower rate, and are not expected to reach pre-pandemic (2019) levels until 2034. Overall, enplanements are projected to increase by 2.4 percent nationally from 2025 to 2045.

The total number of active aircraft in the general aviation fleet is projected to grow by 0.5 percent annually through 2045. This growth is driven largely by increasing numbers of business jets (+2.7%), helicopters (+1.7%), and turboprops (+1.0%), while the total number of piston aircraft are forecasted to decline (-0.1%) over the same period.

TABLE 2A | FAA Activity Forecasts

Year	U.S. Regional Carriers: Domestic Revenue Enplanements (millions)	U.S. Mainline Air Carriers: Domestic Revenue Enplanements (millions)	Combined U.S. Domestic Revenue Enplanements (millions)	Air Carrier Operations (thousands)	Air Taxi/ Commuter Operations (thousands)	GA Aircraft Fleet	GA Operations (thousands)
2015	153	543	696	13,755	7,895	210,031	25,579
2016	152	575	727	14,417	7,580	211,794	25,538
2017	149	595	744	15,047	7,180	211,757	25,571
2018	154	627	781	15,686	7,126	211,749	26,485
2019	159	654	813	16,195	7,274	210,981	27,832
2020	94	370	465	11,742	5,514	204,140	25,387
2021	106	402	508	12,214	5,893	209,194	27,543
2022	127	613	739	15,150	6,522	209,540	28,664
2023	115	696	811	16,158	6,456	214,222	29,852
2024	127	731	858	17,052	6,733	214,940	30,888
2025	130	747	877	17,529	7,029	215,600	31,804
FAA FORECAST							
2030	147	844	991	20,076	7,108	219,405	33,469
2035	167	964	1,131	22,024	7,753	224,805	34,101
2045	210	1,212	1,422	26,382	9,143	238,350	35,421
Compound Average Annual Growth Rate (CAGR)							
2010–2024	-1.7%	3.2%	2.2%	2.2%	-2.4%	-0.3%	1.1%
2024–2025	2.1%	2.1%	2.1%	2.8%	4.4%	0.3%	3.0%
2025–2035	2.6%	2.6%	2.6%	2.3%	1.0%	0.4%	0.7%
2025–2045	2.4%	2.5%	2.4%	2.1%	1.3%	0.5%	0.5%

Source: FAA Aerospace Forecasts, FY 2025–2045

UNMANNED AIRCRAFT SYSTEMS (UAS) – DRONES

UAS, commonly referred to as drones, have been experiencing healthy growth in the U.S. and around the world over the past few years. According to the *FAA Aerospace Forecast*:

> *"A drone consists of a remotely piloted aircraft and its associated elements – including the control station and the associated communication links – that are required for the safe and efficient operation in the national airspace system (NAS). The introduction of drones in the NAS has opened up numerous possibilities, especially from a commercial perspective. This has also brought challenges including drones' safe and secure integration into the NAS. Despite these challenges, the drone sector holds enormous promise; potential uses range from individuals flying solely for recreational purposes to large companies delivering commercial packages and delivering medical supplies. Public service uses, such as conducting search and rescue support missions following natural disasters, are proving promising as well."*

On December 21, 2015, the FAA launched an online registration system for recreational/model small drones, which required all drones that weigh more than 0.55 pounds (or 250 grams) and less than 55 pounds (or 25 kilograms) to be registered. The registration system captures the number of registered pilots but does not capture individual drone aircraft; nevertheless, the registration information provides a basic understanding of the growth in drone activity, from which the FAA has made a growth forecast for the next five years.

Trends in Recreational/Model Aircraft

Through an examination of the drone aircraft registrations and renewals, the FAA estimated that there were as many as 1.87 million small drones in the national fleet by the end of 2024. The FAA developed three forecasts (low range, base range, and high range), which are presented in **Table 2B**. By 2029, the FAA is forecasting nearly two million small drones in its high-range forecast.

TABLE 2B | Total Recreational/Model Fleet

Fiscal Year	Low Range*	Base Range**	High Range**
2024	455,100	1,867,000	1,867,000
FORECAST			
2025	460,000	1,889,400	1,904,300
2026	484,800	1,911,000	1,928,700
2027	497,800	1,922,800	1,945,200
2028	505,500	1,925,800	1,958,800
2029	507,200	1,929,700	1,972,500
CAGR:	2.19%	0.66%	1.11%

CAGR = compound annual growth rate
*Effective/active fleet counts combined with multiplicity of aircraft ownership
**New registration counts combined with multiplicity of aircraft ownership
Source: FAA Aerospace Forecasts, FY 2025–2045

Trends in Commercial/Non-Model UAS Aircraft

Online registration for commercial/non-model small drones went into effect on April 1, 2016. These are commercial drones that weigh less than 55 pounds. Unlike recreational/model ownership, each aircraft must be individually registered. Registrations of commercial/non-model UAS aircraft have been increasing every year, according to the FAA. **Table 2C** shows the FAA forecast for this category of UAS. It is estimated that there were up to 966,000 commercial/non-model UAS in 2024, and they are expected to increase to 1,209,000 by 2029 in the high-range forecast.

TABLE 2C | Total Commercial/Non-Model Fleet

Fiscal Year	Low*	Base**	High**
2024	388,000	966,000	966,000
FORECAST			
2025	395,000	1,030,000	1,035,000
2026	402,000	1,089,000	1,099,000
2027	408,000	1,135,000	1,151,000
2028	411,000	1,165,000	1,187,000
2029	413,000	1,180,000	1,209,000
CAGR:	1.26%	4.08%	4.59%

CAGR = compound annual growth rate
*Effective/active fleet counts
**New registration counts based fleet counts
Source: FAA Aerospace Forecasts, FY 2025–2045

Trends in Large UAS

Drones that weigh 55 pounds (large UAS) or more cannot be operated as recreational remote-piloted aircraft. They are registered with the FAA using the existing aircraft registration system. Large UAS require a Section 49 U.S. Code (USC) § 44807 exemption or a public aircraft operator (PAO) certification. These drones are also required to have tail numbers. At present, most large drones are flown by government entities, but commercial operators have steadily increased; most new large drone operators are active in agricultural spraying operations. The FAA estimates 4,314 large drones were operating in the NAS in 2024 and forecasts that 44,740 commercial large drones will be operating in the NAS by 2029.

Advanced Air Mobility (AAM)

The AAM segment encompasses piloted electric vertical takeoff and landing (eVTOL) vehicles with progressively remote-piloted or automated control options. AAM is defined as "a safe and efficient system for air passenger and cargo transportation, inclusive of small package delivery and other urban drone services, which support a mix of onboard/ground-piloted and increasingly autonomous operations." Urban air mobility (UAM), a subset of the larger AAM category, is envisioned as a transportation system that is likely to use piloted and progressively automated aircraft to move passengers and cargo at lower altitudes within urban and suburban environments.

AAM technology presents considerable opportunities for economic growth over the coming decades. Despite many regulatory and technological issues and because AAM services have not yet begun in the U.S., the FAA provides a general projection of annual trips, daily trips, and fleet size, as outlined in **Table 2D**.

TABLE 2D | Advanced Air Mobility (AAM) Forecasts

	NAS-wide AAM Demand Forecast						
	Year 1 (EIS)	Year 2	Year 3	Year 4	Year 5	Year 6	CAGR
Annual Trips	42,405	323,038	616,115	1,029,883	1,826,525	2,820,956	101.29%
Daily Trips	116	885	1,688	2,822	5,004	7,729	101.35%
Fleet Size	4	32	62	104	184	283	103.37%

CAGR = compound annual growth rate
EIS = entry into service

Source: FAA Aerospace Forecasts, FY 2025–2045

The FAA forecasts indicate that upon reaching the point of entry into service (EIS), demand for AAM operations is likely to grow exponentially within the first several years, despite the ongoing safety and infrastructure challenges that may slow full integration in the short term. Nevertheless, flight testing continues as numerous commercial companies conduct test flights. An example is the advancements Joby Aviation has made with its eVTOL aircraft, which is anticipated to receive FAA certification in 2026. Currently, this aircraft can fly over 150 miles on one battery charge and can carry four passengers.

As previously mentioned, one of the potential challenges that remains for eVTOL entering the marketplace is infrastructure. A system of vertiports for AAM services appears to be the preferred method of operation. Joby Aviation and Archer have partnered with parking garage operator REEF Technology with the goal of using parking garage rooftops as vertiports. Other options may include the establishment of vertiports at existing airports. Because AAM aircraft operate in a manner similar to helicopters, initial AAM operations are anticipated to follow existing helicopters' operations and traffic patterns. If demand grows significantly, formal vertiports may be necessary to more efficiently separate air traffic and increase the safety of operations.

FORECASTING APPROACH

The development of aviation forecasts goes through analytical and judgmental processes. A series of mathematical relationships is tested to establish statistical logic and rationale for projected growth; however, the judgment of the forecast analyst, based on professional experience, knowledge of the aviation industry, and assessment of the local situation, is important in the selection of the preferred forecast. The most reliable approach to estimating aviation demand is through the utilization of more than one analytical technique. Frequently considered methodologies include trend line/time-series projections, correlation/regression analysis, and market share analysis.

Trend line/time-series projections are probably the simplest and most familiar forecasting techniques. By fitting growth curves to historical data and extending them into the future, a basic trend line projection is produced. A basic assumption of this technique is that outside factors will continue to affect aviation demand in a manner similar to the past. As broad as this assumption may be, the trend line projection serves as a reliable benchmark for comparing other projections.

Correlation analysis provides a measure of the direct relationship between two separate sets of historical data. If there is a reasonable correlation between the data sets, further evaluation using regression analysis may be employed.

Regression analysis measures statistical relationships between dependent and independent variables, which yields a correlation coefficient. The correlation coefficient (Pearson's r) measures association between the changes in the dependent variable and the independent variable(s). The higher the r^2 value (coefficient determination), the more reliable the forecast is. Low r^2 values may be used with the understanding that the predictive reliability is reduced.

Market share analysis involves a historical review of the airport activity as a percentage, or share, of a larger regional, state, or national aviation market. A historical market share trend is determined, providing an expected market share for the future. These shares are then multiplied by the forecasts of the larger geographical area to produce a market share projection. This method has the same limitations as trend line projections but can provide a useful check on the validity of other forecasting techniques.

Forecasts age, and the further one is from the base year, the less reliable it may become, particularly due to changing local and national conditions; nevertheless, the study includes a 20-year forecast of aviation demand. Facility and financial planning usually require at least a 10-year view because it often takes more than five years to complete a major facility development program; however, it is important to use forecasts that do not overestimate revenue-generating capabilities or underestimate the demand for facilities necessary to meet public (user) needs.

Future facility requirements (e.g., airline terminal complex component spaces, general aviation hangars, and apron areas) are derived from projections of various aviation demand indicators. Using a broad spectrum of local, regional, and national socioeconomic and aviation information and analyzing the most current aviation trends, forecasts are presented for the following aviation demand indicators:

- Commercial passenger service
    - Annual enplaned passengers
    - Commercial operations and fleet mix
- Potential air cargo
    - Estimated annual enplaned tons
    - Potential air cargo operations and fleet mix
- General aviation
    - Based aircraft and based aircraft fleet mix
    - General aviation operations
    - Air taxi and military operations
- Peaking characteristics
    - Air carrier enplanement peaks
    - General aviation operations peaks
    - Total airport operations peaks
- Critical aircraft determination
    - Existing and ultimate airport critical aircraft
    - Existing and ultimate runway design code (RDC) by runway

This forecasting effort considers a base year of 2025.

RECENT COMPARISON FORECASTS

Part of the process of developing master plan forecasts is to review any aviation demand forecasts that have been recently developed. The following subsections discuss these recent forecasts for the airport.

FAA TERMINAL AREA FORECAST (TAF)

On an annual basis, the FAA publishes the *Terminal Area Forecast* (TAF) for each airport included in the *National Plan of Integrated Airport Systems* (NPIAS). The TAF is a generalized forecast of airport activity used by the FAA for internal planning purposes. It is available to airports and consultants to use as a baseline projection and is an important point of comparison while developing local forecasts.

Table 2E presents the 2025 TAF for the airport (published in January 2025). The TAF estimates 199,834 passenger enplanements in 2025 with a projected annual growth rate of 1.26 percent through 2045, yielding 256,829 enplanements. The TAF baseline tracks closely (approximately 1.3 percent difference) to the baseline 2025 enplanement count, which totaled 202,405 enplanements (12-month period ending in October 2025), per airport records.

TABLE 2E | 2025 FAA Terminal Area Forecast

Parameter	2025	2030	2035	2045	CAGR
ENPLANEMENTS					
Air Carrier	10	10	10	10	0.00%
Commuter	199,824	214,871	228,386	256,819	1.26%
Total Enplanements:	**199,834**	**214,881**	**228,396**	**256,829**	**1.26%**
ANNUAL OPERATIONS					
Itinerant Operations					
Air Carrier	6,529	7,338	7,813	8,815	1.51%
Air Taxi	5,667	5,945	6,248	6,901	0.99%
General Aviation	19,586	23,114	23,227	23,453	0.90%
Military	2,314	2,314	2,314	2,314	0.00%
Total Itinerant Operations:	**34,096**	**38,711**	**39,602**	**41,483**	**0.99%**
Local Operations					
General Aviation	16,196	18,540	18,657	18,894	0.77%
Military	1,141	1,141	1,141	1,141	0.00%
Total Local Operations:	**17,337**	**19,681**	**19,798**	**20,035**	**0.73%**
TOTAL OPERATIONS:	**51,433**	**58,392**	**59,400**	**61,518**	**0.90%**
BASED AIRCRAFT	**193**	**208**	**223**	**265**	**1.60%**

CAGR = compound annual growth rate

Source: FAA Terminal Area Forecast, January 2025

For aircraft operations, the TAF projects an annual growth rate of 1.51 percent for air carrier operations (commercial aircraft with more than 60 seats) and 0.99 percent for annual commuter aircraft operations (commercial aircraft with fewer than 60 seats). Itinerant general aviation operations are projected to increase annually by 0.90 percent, while local general aviation operations are projected to increase annually by 0.77 percent.

Total operations are projected to increase annually by 0.90 percent. Based aircraft are projected to grow annually by 1.60 percent, increasing from 193 to 265 based aircraft within the next 20 years.

2019 MASTER PLAN FORECASTS

Aviation demand forecasts were created as part of the master plan prepared for SAF in 2019. As shown in **Table 2F**, modest growth was projected for each demand category; passenger enplanements were projected to grow at a compound annual growth rate (CAGR) of 2.3 percent, total operations at a CAGR of 0.9 percent, and based aircraft at a CAGR of 1.3 percent.

TABLE 2F | 2019 SAF Master Plan Forecast Summary

	2014	2020	2025	2035	CAGR
Passenger Enplanements	74,551	85,000	95,000	120,000	2.3%
Total Operations	68,300	71,300	74,900	82,400	0.9%
Based Aircraft	181	195	210	235	1.3%

PASSENGER SERVICE BACKGROUND DATA

To evaluate commercial service potential at SAF and the facilities necessary to properly accommodate present and future airline activity, two basic elements must be forecasted: annual enplaned passengers and annual airline operations. Annual enplaned passengers serve as the most basic indicator of demand for commercial passenger service activity. The combination of enplanements and deplanements generally equals the total number of passengers using an airport. The annual number of enplanements is the figure utilized by the FAA to determine various entitlement funding levels for commercial service airports.

The term "enplanement" refers to a passenger boarding an airline flight. Enplaning passengers are then described as either "originating" or "connecting/transferring." Originating passengers depart a specific airport for a destination or hub airport to connect/transfer to another flight. Connecting/transferring passengers are those who have departed from other locations and are using the airport as an intermediate stop. Such a passenger may disembark their originating flight to wait in the terminal for their next flight, or they could simply remain on the aircraft as an intermediate stop as a "through" passenger. SAF and similar airports tend to have mostly originating passengers; larger hubs, like those in Albuquerque or Denver, will have a more significant percentage of passengers who are connecting/transferring.

SOCIOECONOMIC TRENDS

Local and regional forecasts of key socioeconomic variables, such as population, employment, income and gross regional product (GRP), provide an indication of the potential for growth in aviation activities at an airport. **Table 2G** summarizes socioeconomic history and projections for Santa Fe County with a comparison to the State of New Mexico. In 2025, the base year for these forecasts, there were an estimated 159,001 residents in Santa Fe County. This number is projected to grow to 179,919 by 2045 for an annual growth rate of 0.62 percent. Employment is projected to grow annually at 0.76 percent, while annual income growth is projected at a robust 4.13 percent through 2045. GRP within Santa Fe County has grown at a historical CAGR of 1.18 percent. GRP growth is projected to slow to a 0.65 percent CAGR through 2045.

TABLE 2G | Socioeconomic Forecast Data

Year	STATE OF NEW MEXICO				SANTA FE COUNTY			
	Population	Employment	Income[1]	GRP[2]	Population	Employment	Income[1]	GRP[2]
2016	2,099,775	1,092,375	38,472	92,055,640	150,748	94,533	53,579	6,975,598
2017	2,100,989	1,095,489	39,198	93,210,061	151,885	93,648	54,074	6,940,839
2018	2,103,024	1,110,588	40,979	96,855,589	152,624	94,233	57,168	7,106,479
2019	2,110,087	1,116,851	43,225	100,301,429	153,698	94,319	60,878	7,210,078
2020	2,118,606	1,069,532	46,483	96,192,088	155,056	88,032	63,437	6,930,993
2021	2,117,333	1,092,643	50,682	103,676,604	155,429	91,476	70,464	7,557,667
2022	2,113,868	1,139,487	53,069	110,358,855	155,768	95,312	72,929	7,496,063
2023	2,121,164	1,154,409	55,166	112,049,549	156,507	96,234	77,444	7,700,918
2024	2,130,256	1,164,453	56,844	113,789,847	157,765	96,986	79,247	7,771,493
2025	2,144,808	1,174,394	59,416	115,615,173	159,001	97,751	82,747	7,843,311
CAGR 2016–2025	**0.21%**	**0.73%**	**4.44%**	**2.30%**	**0.53%**	**0.34%**	**4.44%**	**1.18%**

(Continues)

TABLE 2G | Socioeconomic Forecast Data (continued)

Year	STATE OF NEW MEXICO				SANTA FE COUNTY			
	Population	Employment	Income[1]	GRP[2]	Population	Employment	Income[1]	GRP[2]
FORECAST								
2030	2,215,855	1,223,326	73,740	125,071,148	164,967	101,645	102,075	8,209,907
2035	2,282,939	1,272,930	91,041	135,254,794	170,460	105,629	125,086	8,584,671
2045	2,403,964	1,376,979	137,648	158,154,464	179,919	113,735	185,999	9,342,933
CAGR 2025–2045	**0.57%**	**0.80%**	**4.29%**	**1.58%**	**0.62%**	**0.76%**	**4.13%**	**0.65%**

CAGR = compound annual growth rate
GRP = gross regional product
[1]In Current U.S. Dollars
[2]In 2017 U.S. Dollars
Source: Woods & Poole, Complete Economic and Demographic Data Source (CEDDS), 2025

AIRLINE SERVICE

The airport averages approximately 26 daily inbound and outbound commercial airline flights. **Table 2H** summarizes the generalized airline schedule for SAF for the week of December 15 through December 21, 2025. Service at SAF is currently offered by American Airlines and United Airlines with flights for both airlines operated by SkyWest Airlines, which is a regional carrier.

TABLE 2H | SAF Airline Schedule

Flight #	Origin	Arrival Time	Departure Time	Destination	Gate Time (h:mm)	Aircraft	Seats
Gate 2 – American Airlines							
6272/6403	RON	RON	6:15 AM	DFW	RON	CRJ700	65
6433	DFW	9:28 AM	10:05 AM	DFW	0:37	CRJ700	65
6194/6447	DFW	12:24 PM	12:54 PM	DFW	0:30	CRJ700	65
6210/4959	LAX	1:00 PM	1:30 PM	ORD	0:30	CRJ700	65
6216/6308	ORD	1:38 PM	2:08 PM	LAX	0:30	CRJ700	65
4941/6322	PHX	2:55 PM	3:27 PM	PHX	0:32	CRJ700	65
6496	DFW	4:12 PM	4:43 PM	DFW	0:31	CRJ700	65
6456/6247/6369	PHX	5:40 PM	6:10 PM	PHX	0:30	CRJ700	65
6405	DFW	9:48 PM	RON	RON	RON	CRJ700	65
Gate 3 – United Airlines							
5885/5495	DEN	RON	7:00 AM	DEN	RON	CRJ700	70
4731	DEN	9:39 AM	11:00 AM	DEN	1:21	CRJ700	70
5310/5878	DEN	12:44 PM	1:22 PM	DEN	0:38	CRJ700	70
5360/5708	DEN	4:02 PM	4:40 PM	DEN	0:38	CRJ700	70
5643/5803	DEN	5:02 PM	6:02 PM	DEN	1:00	CRJ700	70
4684	DEN	9:59 PM	RON	RON	RON	CRJ700	70

RON = remain overnight
Source: Generalized schedule for the week of December 15 through December 21

American Airlines offers approximately eight daily departures serving Dallas-Fort Worth International Airport (DFW), Los Angeles International Airport (LAX), Chicago O'Hare International Airport (ORD), and Phoenix Sky Harbor International Airport (PHX), each of which is a major hub for American Airlines. American Airlines has also provided seasonal service to George Bush Intercontinental/Houston Airport (IAH) during the summer months with one weekly departure on Saturdays. American Airlines utilizes the Bombardier CRJ700, which has a 65-person seating capacity configured as nine first-class seats, 16 premium economy seats, and 40 economy seats.

United Airlines offers approximately five daily departures serving Denver International Airport (DEN), which is a hub for United Airlines. United Airlines also utilizes the CRJ700 with a 70-person seating capacity configured as six first-class seats, 16 premium economy seats, and 48 economy seats. United Airlines also occasionally utilizes the Embraer ERJ175. The ERJ175 has a 70-person seating capacity with 12 first-class seats, 32 premium economy seats, and 26 economy seats.

HISTORICAL ENPLANEMENT ACTIVITY

An enplanement is documented as a revenue passenger boarding an aircraft. Enplanements are a particularly important metric because the FAA uses these numbers to allocate various capital improvement entitlement funds. Any airport with more than 10,000 annual enplanements will receive at least $1.3 million in entitlement funding. Additional funding is provided via an established formula for each enplanement above that minimum.

Table 2J shows historical passenger enplanements for SAF going back to 2005. SAF had limited service available from 2005 to 2007 and was without regular scheduled service from the end of 2007 to the summer of 2009, resulting in low enplanement levels. American Airlines started service at SAF in spring 2009 and flight frequency and non-stop destinations have grown steadily since then. Passenger enplanements for 2025, which is represented by the 12-month period ending in October 2025, established a new record high for the airport on 202,405 enplanements, exceeding the previous record of 182,167 in 2024. The 20-year CAGR is 16.0 percent; however, this statistic has moderated as enplanements have grown. Since 2019, the year prior to the impacts of the global COVID-19 pandemic, SAF's enplanement CAGR is 6.0 percent, compared to 0.8 percent for all airports in the State of New Mexico[1].

TABLE 2J | SAF Enplanement History

Year	Enplanements	Data Source
2005	10,396	T-100
2006	9,437	T-100
2007	10,972	T-100
2008	125	T-100
2009	9,631	T-100
2010	43,699	T-100
2011	43,362	T-100
2012	48,060	T-100
2013	69,030	T-100
2014	74,622	T-100
2015	75,403	T-100
2016	71,251	T-100
2017	103,667	T-100
2018	115,500	T-100
2019	142,597	T-100
2020	49,886	T-100
2021	95,143	T-100
2022	123,473	T-100
2023	140,195	T-100
2024	182,167	Airport Records
2025*	202,405	Airport Records
6-year CAGR	**6.0%**	
10-year CAGR	**10.4%**	
20-year CAGR	**16.0%**	

CAGR = compound annual growth rate
T-100 = Bureau of Transportation Statistics, *T-100 Air Carrier Statistics Database*
*2025 enplanement data represent 12 months ending in October 2025.

ENPLANEMENT FORECAST

Forecasted enplanements are the single most important statistic for airports to consider when planning future facility needs. Many models used in airport planning use enplanements as a base input data point. Enplanements are also a key metric used by the FAA to determine entitlement funding levels for eligible capital improvement projects.

[1] State of New Mexico enplanement data sourced from the FAA *Terminal Area Forecast* issued January 2025.

As previously described, several forecasting techniques are employed to develop multiple enplanement forecasts. These forecasts will effectively create a planning envelope from which a single selected forecast will be identified and used to determine facility requirements. It is preferred to select a single forecast from those developed; however, it is also acceptable to blend multiple forecasts to arrive at a selected forecast. Ultimately, a single enplanement forecast must be selected. The following subsections present the analysis for the enplanement forecast.

REGRESSION ANALYSIS FORECASTS

Regression analysis begins with an understanding that the dependent variable is the primary factor one is trying to predict. In this case, the dependent variable is future passenger enplanements. The independent variable(s) is the data point or value for which future forecast data already exist; therefore, the regression model can be run with a set of historical data and the resultant mathematical determination can be used to find the future results for the dependent variable. Regression models can be used with a single independent variable or multiple independent variables. When the regression is run with a single variable, outlier data in the historical data set can have a significant impact on the results, so it is common to eliminate outliers before running the regression. When the analysis is run with multiple independent variables, the results tend to be somewhat smoothed; thus, a single outlier data point is less impactful. A reliable regression model will benefit from more historical data. In aviation forecasting, at least 10 years of data should be utilized, and more if possible.

Trend Line/Time-Series Regression Analysis

Trend line/time-series projections are probably the simplest and most familiar regression forecasting techniques. The trend line method utilizes the future years as the independent variable with historical enplanements as the dependent variable. By mathematically fitting a growth line to historical data and extending the line into the future, a basic trend line projection is produced. A basic assumption of this technique is that outside factors will continue to affect aviation demand in a manner similar to the past. As broad as this assumption may be, the trend line projection serves as a reliable benchmark for comparing other projections.

Four different trend line regressions were run, the results of which are presented in **Table 2K**. The first considered the full 20-year enplanement history (including the COVID-19 pandemic years) from 2005 through 2025, resulting in a 2.52 percent CAGR. Recognizing that the pandemic enplanement decline experienced from 2020 to 2021 was an outlier in relation to the historical trend, a second time-series regression was run using the historical enplanement data but excluding 2020 and 2021 data. This regression achieved a higher r^2 value of 0.938 and a CAGR of 2.98 percent.

TABLE 2K | Trend Line Regressions for Enplanements

Independent Variable (Years)	Observations	r^2	Enplanements (Dependent Variable)				CAGR
			2025	2030	2035	2045	
Yearly from 2005–2025	21	0.834	202,405	204,900	247,500	332,700	2.52%
Yearly from 2005–2019, 2022–2025	19	0.938	202,405	223,800	270,700	364,500	2.98%
Yearly from 2015–2025	11	0.558	202,405	222,400	274,600	378,900	3.18%
Yearly from 2015–2019, 2021–2025	10	0.733	202,405	229,300	281,400	385,700	3.28%

CAGR = compound annual growth rate

The third trend line regression considered enplanement data from 2015 through 2025, including the COVID-19 years. Not surprisingly, this regression resulted in the lowest r^2 value (0.558) and a CAGR of 3.18 percent. A fourth time-series regression using data from 2015 to 2025 but excluding 2020, which was the most significantly impacted COVID-19 year, resulted in an r^2 value of 0.733 and a CAGR of 3.28 percent. The trend line regressions produced a 2045 enplanement range between 332,700 and 385,700. The regression that included data from 2005 through 2025, excluding COVID-19 years 2020 and 2021, produced the highest correlation value of the four and resulted in 364,500 annual enplanements by 2045.

Single and Multi-Variable Regression Analysis

Additional regression models were developed that consider the socioeconomic indicators of population, employment, income, and GRP, which can have an influence on aviation demand. Two models were established: (1) 20 years of historical socioeconomic data from 2005 to 2025, including the COVID-19 years (2020–2021), and (2) 13 years of historical socioeconomic data from 2010 to 2025, excluding years in which SAF experienced annual enplanements levels around 10,000 and below (2005–2009) and the COVID-19 years.

As expected, the results of the regressions (shown in **Table 2L**) show that the inclusion of the COVID-19 years has a negative impact on the results. The r^2 value for each independent variable within the model that included COVID-19 years was reduced by 0.282, on average, which indicates the predictive ability for this model is less reliable. As a result, none of the regressions that include COVID-19 years appear reasonable for consideration in the enplanement forecast. The regression model that excludes the COVID-19 years appears far more reasonable for consideration. The year and population variables have r^2 values above 0.90 and the others are slightly below 0.90.

TABLE 2L | Regression Correlation Results

Independent Variable	Observations	r^2
2005–2025 (including COVID-19 years)		
Year	21	0.834
Population	21	0.801
Employment	21	0.065
Income	21	0.731
GRP	21	0.596
2010–2025 (excluding 2020-2021)		
Year	14	0.914
Population	14	0.924
Employment	14	0.843
Income	14	0.884
GRP	14	0.873

Source: Coffman Associates analysis

Table 2M summarizes the six single-variable and multi-variable regressions that appear to be the most reasonable at SAF. Each has an r^2 value over 0.90 and these regressions span a CAGR range of 3.1 percent to 4.9 percent through 2045 with total annual enplanement levels between 374,500 to 527,600 by 2045.

TABLE 2M | Single and Multi-Variable Regressions for Enplanements

Independent Variables	Observations	r^2	Enplanements (Dependent Variable)				CAGR
			2025	2030	2035	2045	
Year, Population, Employment, Income, GRP	14	0.970	202,405	298,300	375,600	451,500	4.1%
Year, Population, GRP	14	0.964	202,405	319,300	414,600	527,600	4.9%
Population, GRP	14	0.929	202,405	244,400	301,000	401,300	3.5%
Population, Employment	14	0.927	202,405	258,200	326,500	449,300	4.1%
Population	14	0.924	202,405	248,700	309,400	413,900	3.6%
Year	14	0.914	202,405	228,300	277,000	374,500	3.1%

CAGR = compound annual growth rate
Historical data used: 2010–2019, 2022–2025

TRAVEL PROPENSITY FACTOR (TPF) FORECAST

A variety of local factors affect the potential for passengers within an area. A key statistic to consider is the relationship of the airport's enplanements with the populace it serves. The TPF is the ratio of enplanements to population and is predominantly impacted by the proximity of an airport to other regional airports with higher levels of service, or "hub" airports. Regional airports with higher TPF ratios tend to be located farther from hub airports in relatively isolated areas. These airports generally have service areas that extend into adjacent, well-populated regions, or have air service advantages that attract more of passengers who might otherwise choose to drive to more distant hub airports. This is true for SAF, which is considered a popular tourist destination, attracting an annual average of two million overnight visitors, according to the City of Santa Fe's official travel website.[2] Generally, the higher the TPF, the more likely air travelers are to utilize a local airport.

Two enplanement forecasts based on the historical TPF were developed and are presented in **Table 2N**. The first considers applying the 2025 TPF as a constant in relation to forecasted population growth. This forecast results in a CAGR of 0.62 percent and 229,000 enplanements by 2045. The second TPF forecast considers an increasing TPF that is more reflective of the historical growth trend for the TPF statistic. This forecast results in 359,000 enplanements by 2045 and CAGR of 2.91 percent.

TABLE 2N | Enplanement Projection Based on Travel Propensity Factor (TPF)

Year	Enplanements	County Population	TPF
2015	75,403	149,757	0.5035
2016	71,251	150,748	0.4726
2017	103,667	151,885	0.6825
2018	115,500	152,624	0.7568
2019	142,597	153,698	0.9278
2020	49,886	155,056	0.3217
2021	95,143	155,429	0.6121
2022	123,473	155,768	0.7927
2023	139,789	156,507	0.8932
2024	182,167	157,765	1.1547
2025	202,405	159,001	1.2730
Constant Share of 2025 TPF (CAGR = 0.62%)			
2030	210,000	164,967	1.2730
2035	217,000	170,460	1.2730
2045	229,000	179,919	1.2730
Increasing Share TPF (CAGR = 2.91%)			
2030	235,900	164,967	1.4300
2035	261,500	170,460	1.5341
2045	359,000	179,919	1.9953

CAGR = compound annual growth rate

Sources: Enplanements – Bureau of Transportation Statistics, T-100 Air Carrier Statistics Database, 2015–2022 / Airport Records, 2023–2025; County Population – Woods & Poole, CEDDS

[2] https://www.santafe.org/media/city-profile/

MARKET SHARE OF DOMESTIC ENPLANEMENT FORECAST

The next forecasting method employed considers the airport's historical market share of U.S. domestic airline enplanements. National forecasts of U.S. domestic airline enplanements are compiled each year by the FAA and consider the state of the economy, fuel prices, and prior year developments. According to the most recent publication, *FAA Aerospace Forecasts – Fiscal Years 2025–2045*, domestic passenger enplanements are forecasted to increase at an average annual rate of 2.45 percent over the 20-year forecast period. Two enplanement forecasts were developed as a market share percent of national domestic airline enplanement forecasts, as shown in **Table 2P**.

The first considers SAF maintaining its 2025 percent of national enplanements (0.0231 percent), which results in 228,800 enplanements by 2045 and a CAGR of 2.45 percent. The second considers applying an increasing market share of 0.0286 percent, which is more reflective of the historical trend, resulting in 407,300 enplanements by 2045 and a CAGR of 3.56 percent.

TABLE 2P | Forecasts Based on US Domestic Enplanement Estimates

Year	SAF Enplanements[1]	Total US Domestic Enplanements (millions)[2]	SAF Market Share
2015	75,403	696.230	0.0108%
2016	71,251	726.152	0.0098%
2017	103,667	743.866	0.0139%
2018	115,500	780.899	0.0148%
2019	142,597	813.071	0.0175%
2020	49,886	464.717	0.0107%
2021	95,143	507.602	0.0187%
2022	123,473	739.353	0.0167%
2023	139,789	810.995	0.0172%
2024	182,167	858.465	0.0212%
2025	202,405	876.650	0.0231%
Constant Market Share of U.S. Domestic Enplanements (CAGR = 2.45%)			
2030	228,800	990.870	0.0231%
2035	261,200	1,131.191	0.0231%
2045	328,400	1,422.164	0.0231%
Increasing Market Share of U.S. Domestic Enplanements (CAGR = 3.56%)			
2030	242,500	990.870	0.0245%
2035	292,600	1,131.191	0.0259%
2045	407,300	1,422.164	0.0286%
CAGR = compound annual growth rate			

Sources: [1]Bureau of Transportation Statistics, T-100 Air Carrier Statistics Database, 2015–2022 / Airport Records, 2023–2025; [2]FAA Aerospace Forecasts, 2025–2045

GROWTH RATE FORECASTS

A simple forecasting method is to examine the historical growth rate of an aviation demand indicator and apply it to the future planning years. This type of projection is often better understood to be a check on the reasonableness of other projections but can also be the selected forecast when that specific indicator tends to influence demand in the area.

Table 2Q presents three growth rate forecasts based on 10 years of data for population, employment, income, and GRP. The resulting enplanement forecasts range between 229,000 and 285,200 by 2045 and CAGRs between 0.62 percent and 1.73 percent.

TABLE 2Q | Socioeconomic Growth Rate Forecasts

Socioeconomic Variable	Enplanements				
	2025	2030	2035	2045	CAGR
Population	202,405	208,800	215,300	229,000	0.62%
Employment	202,405	210,200	218,300	235,500	0.76%
Income	202,405	220,500	240,300	285,200	1.73%
GRP	202,405	211,500	220,900	241,100	0.88%

GRP = gross regional product

Source: Woods & Poole, CEDDS

ENPLANEMENT FORECAST SUMMARY

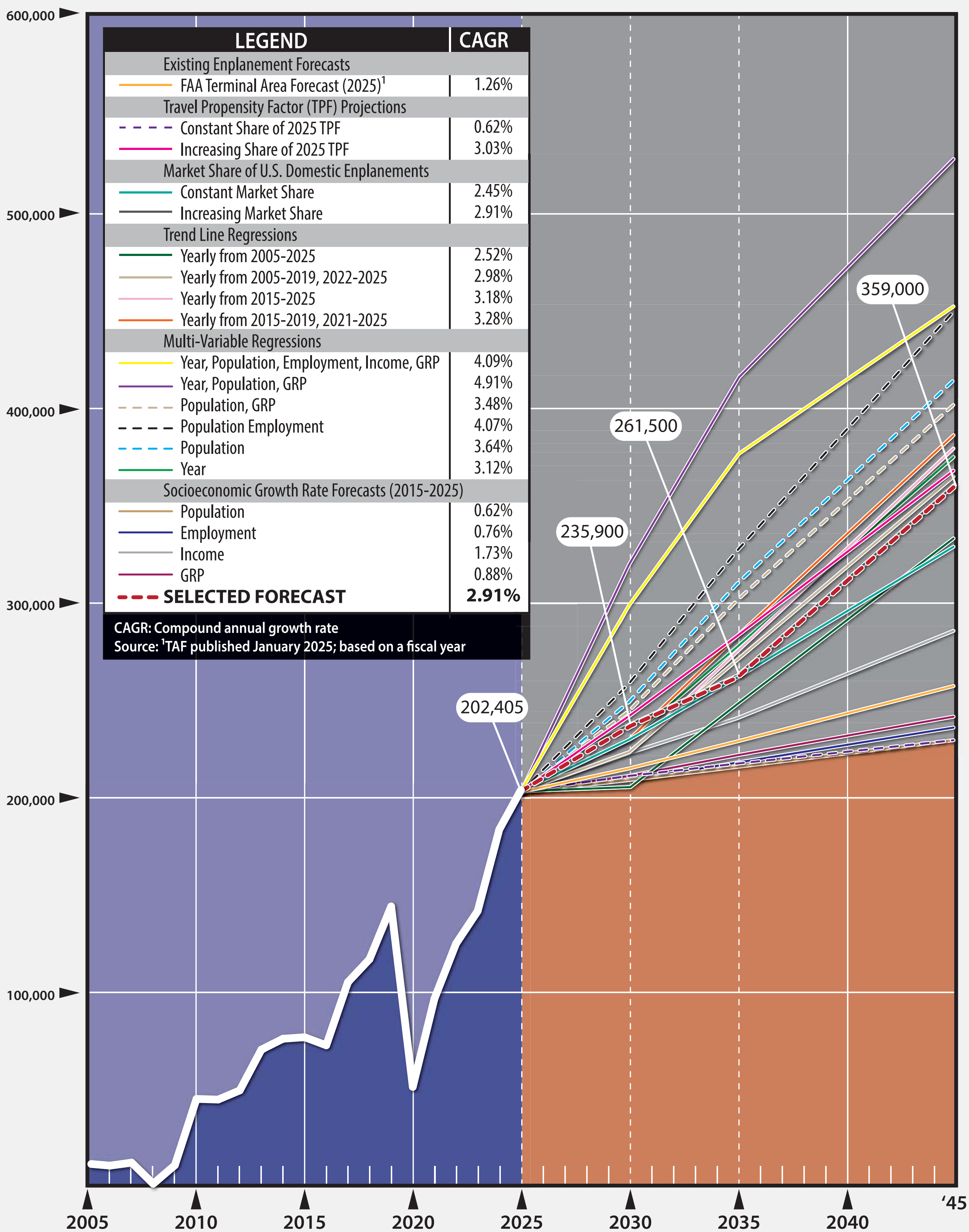
Table 2R and **Exhibit 2A** summarize the enplanement forecasts considered. The TAF from the FAA is included at the top of the table as a point of reference. The TAF can be the selected forecast; however, TAFs are not meant to replace a local forecasting effort and are instead intended to provide guidance. Ultimately, the selected forecast should be within TAF tolerances (10 percent in the five-year timeframe and 15 percent in the 10-year timeframe) unless there is a defensible, logical reason it is not.

TABLE 2R | Enplanement Projection Summary

Forecasts	2025	2030	2035	2045	CAGR
Existing Enplanement Forecasts					
FAA Terminal Area Forecast (2025)[1]	199,834	214,881	228,396	256,829	1.26%
Travel Propensity Factor (TPF) Projections					
Constant Share of 2025 TPF	202,405	210,000	217,000	229,000	0.62%
Increasing Share of 2025 TPF	202,405	235,900	261,500	359,000	2.91%
Market Share of U.S. Domestic Enplanements					
Constant Market Share	202,405	228,800	261,200	328,400	2.45%
Increasing Market Share	202,405	242,500	292,600	407,300	3.56%
Trend Line Regressions					
Yearly from 2005–2025	202,405	204,900	247,500	332,700	2.52%
Yearly from 2005–2019, 2022–2025	202,405	223,800	270,700	364,500	2.98%
Yearly from 2015–2025	202,405	222,400	274,600	378,900	3.18%
Yearly from 2015–2019, 2021-2025	202,405	229,300	281,400	385,700	3.28%
Multi-Variable Regressions					
Year, Population, Employment, Income, GRP	202,405	298,300	375,600	451,500	4.09%
Year, Population, GRP	202,405	319,300	414,600	527,600	4.91%
Population, GRP	202,405	244,400	301,000	401,300	3.48%
Population Employment	202,405	258,200	326,500	449,300	4.07%
Population	202,405	248,700	309,400	413,900	3.64%
Year	202,405	228,300	277,000	374,500	3.12%
Socioeconomic Growth Rate Forecasts (2015–2025)					
Population	202,405	208,800	215,300	229,000	0.62%
Employment	202,405	210,200	218,300	235,500	0.76%
Income	202,405	220,500	240,300	285,200	1.73%
GRP	202,405	211,500	220,900	241,100	0.88%
Selected Forecast:	**202,405**	**235,900**	**261,500**	**359,000**	**2.91%**

CAGR = compound annual growth rate

Source: [1]TAF published January 2025; based on a fiscal year


LEGEND | CAGR
Existing Enplanement Forecasts
FAA Terminal Area Forecast (2025)1 1.26%
Travel Propensity Factor (TPF) Projections
Constant Share of 2025 TPF 0.62%
Increasing Share of 2025 TPF 3.03%
Market Share of U.S. Domestic Enplanements
Constant Market Share 2.45%
Increasing Market Share 2.91%
Trend Line Regressions
Yearly from 2005-2025 2.52%
Yearly from 2005-2019, 2022-2025 2.98%
Yearly from 2015-2025 3.18%
Yearly from 2015-2019, 2021-2025 3.28%
Multi-Variable Regressions
Year, Population, Employment, Income, GRP 4.09%
Year, Population, GRP 4.91%
Population, GRP 3.48%
Population Employment 4.07%
Population 3.64%
Year 3.12%
Socioeconomic Growth Rate Forecasts (2015-2025)
Population 0.62%
Employment 0.76%
Income 1.73%
GRP 0.88%
SELECTED FORECAST 2.91%
CAGR: Compound annual growth rate
Source: 1TAF published January 2025; based on a fiscal year
600,000
500,000
400,000
300,000
200,000
100,000
202,405
235,900
261,500
359,000
2005
2010
2015
2020
2025
2030
2035
2040
'45

The enplanement forecasts result in a wide planning envelope ranging from 229,000 to 527,600 annual enplanements by 2045. Historical enplanement trends at SAF reflect an airport that, over the past 20 years, has grown from an airport with limited air service from 2005 through 2009 to the second busiest enplanement airport in the state. This growth has resulted in a high 20-year CAGR of 16.0 percent. As the SAF market has matured, CAGRs have started to normalize, with the 10-year CAGR at 10.4 percent and the six-year CAGR at 6.0 percent. It is anticipated that this maturation process will continue in the future, so forecasts with CAGRs in the higher range over the next 20 years are considered as less likely to occur. Alternatively, the airport's plan to expand the terminal building provides the condition that allows the airlines to expand service, which will support continued enplanement growth. For this reason, forecasts with CAGRs on the lower side of the spectrum are also considered less likely to occur.

The selection of a single forecast is important for use in future analyses, such as terminal building needs, aircraft fleet mix determination, and aircraft apron needs. Because this is a planning study, it is also important not to over-forecast or under-forecast, as either can limit the flexibility of airport management and the FAA when identifying future projects. The selected forecast is the one that continues the growth trend of the airport's TPF. This forecast results in a strong CAGR of 2.91 percent, which exceeds state (1.16%) and federal (2.45%) growth rates. This forecast also remains within the FAA TAF tolerance, avoiding the need to submit the forecast to FAA headquarters for approval. The selected enplanement forecast for SAF is as follows:

- 2025 – 202,405
- 2030 – 235,900
- 2035 – 261,500
- 2045 – 359,000

CHARTER ENPLANEMENTS

While most passenger enplanements at SAF are handled by the scheduled passenger airlines, SAF experiences numerous charter and on-demand flights. These passengers are revenue passengers and must be considered as part of the overall enplanement forecast. Prior to 2025, charter enplanements were conducted by a few small charter operations, such as Silver Air, Advanced Air, and VistaJet utilizing primarily business jet and turboprop aircraft. From 2019 to 2024, total charter enplanements averaged approximately 100 per year. In spring 2025, JetSuite X (JSX) started seasonal charter service with one flight each way between SAF and DFW five days a week. As of December 2025, the seasonal service has concluded for the season and service is planned to start again in late May 2026, running through September 2026 with four weekly flights.

Table 2S presents the historical and forecasted annual charter enplanements for SAF. Enplanement levels for charter operations have historically represented a small percentage of total airport enplanements. The introduction of JSX increased total charter enplanements to 1,532 in 2025. For the purposes of this study, an annual figure of 2,000 was utilized for forecasting charter enplanements, allowing for a slight increase over what was experienced in 2025 but representing less than one percent of total airport enplanements. All other enplanements at SAF are anticipated to be associated with scheduled airline service.

TABLE 2S | Charter Enplanements

Year	Charter Enplanements	Airline Enplanements	Total Enplanements
2015	14	75,389	75,403
2016	58	71,193	71,251
2017	18	103,649	103,667
2018	15	115,485	115,500
2019	62	142,535	142,597
2020	5	49,881	49,886
2021	62	95,081	95,143
2022	173	123,300	123,473
2023	144	140,051	140,195
2024	164	182,003	182,167
2025	1,532	200,873	202,405
Forecast			
2030	2,000	233,900	235,900
2035	2,000	259,500	261,500
2045	2,000	357,000	359,000

Sources: Bureau of Transportation Statistics, T-100 Air Carrier Statistics Database; Coffman Associates analysis

AIRLINE OPERATIONAL FORECASTS

The commercial service aircraft fleet mix defines several key parameters in airport planning, including terminal complex layout, maximum stage length capabilities (affecting runway length evaluations), and in some cases, the critical aircraft (for pavement design and ramp geometry). A projection of the fleet mix for SAF was developed by reviewing the equipment used by the carriers that have served the airport over the years.

Changes in equipment, airframes, and engines have always had a significant impact on airlines and airport planning. There are many ongoing programs by aircraft manufacturers to improve performance characteristics; these programs continue to focus on improvements in fuel efficiency. Regional jets have also become a larger factor as airlines look for ways to reduce costs. Many airlines have replaced larger commercial jets, as well as commuter turboprops on smaller, emerging routes, with regional jets. Regional jet aircraft eventually became available with as few as 37 seats and as many as 100 seats, which bridged a long-existing gap in seating capacity, making regional jets the aircraft of choice at nonhub and many small hub airports.

In the United States, the use of regional jets was met with resistance from the pilot unions. Scope clauses were written into union contracts with the major airlines that placed restrictions on regional aircraft that may be flown by the airlines' regional affiliates. The unions believed that limiting the regional airlines' passenger capacity through the numbers and sizes of aircraft would protect union jobs.

United, Delta, and American Airlines have varying scope clauses. The greatest limitation has been restricting affiliates to no more than 76 seats and 86,000 pounds maximum takeoff weight. This led the regional jet manufacturers, such as Embraer and Bombardier, to reconfigure 90-seat regional jets to just 76 (or even 70) seats to meet the scope clauses.

In addition, most next-generation regional aircraft, such as the Embraer E-Jet E2 and the Mitsubishi MRJ series, exceed the 76-seat and 86,000-pound limits, which essentially prohibits these aircraft from being utilized in the fleets of regional airlines in the United States. In fact, Mitsubishi terminated its regional jet program in 2023 due to the uncertainty of the regional jet market size.

The scope clauses are generally more liberal for 50-seat and smaller aircraft. Unfortunately, the 50-seat and smaller regional jets, as well as 10- to 50-seat turboprops, are no longer manufactured. United Airlines has begun operating a replacement 50-seat regional jet, the CRJ-550. The aircraft was developed by Bombardier from its 70-seat CRJ-700 and is specifically designed to work around scope clauses. The aircraft is equipped with 10 first-class seats, 20 economy-plus seats, and 20 economy seats. While historical operational data do not indicate that the CRJ-550 has been used for any flights at SAF, United Airlines' flight schedule shows that some of its routes to/from Denver occasionally utilize the CRJ-550.

The future of aircraft serving nonhub and small hub airports will remain dependent on the major airlines' negotiations with their unions. The following subsections examine the fleet mix of scheduled airline operations at SAF and forecasts what may be expected over the next 20 years.

HISTORICAL AIRLINE ACTIVITY

Exhibit 2B shows historical airline activity data by month going back to 2015. Total departure operations, total available departure seats, and boarding load factor (BLF) are shown. The data show how the average number of seats available at SAF has increased from 48 in 2015 to 67 in 2025. BLF has remained relatively consistent as the number of seats has increased, averaging 80 percent since 2015 (excluding 2020, which was impacted by the COVID-19 pandemic).

SCHEDULED AIRLINE OPERATIONS AND FLEET MIX

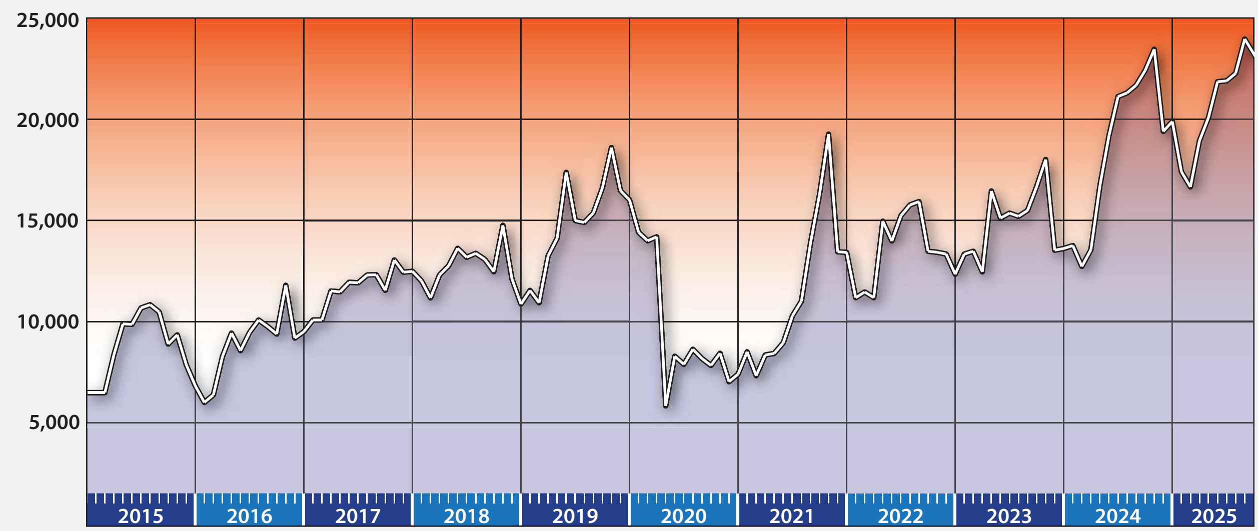
The airline operations forecast is a function of aircraft utilization and the BLF. The BLF is the ratio of enplanements to available seats. Monthly airline activity data reported through the Bureau of Transportation Statistics *T-100 Air Carrier Statistics Database* were utilized in this analysis. **Table 2T** shows the number of airline departures by aircraft type for 2025 (12 months ending in September 2025). The airlines experienced an overall BLF of 81.6 percent in 2025.

TABLE 2T | Departures by Airline Aircraft and Available Seats (2025)

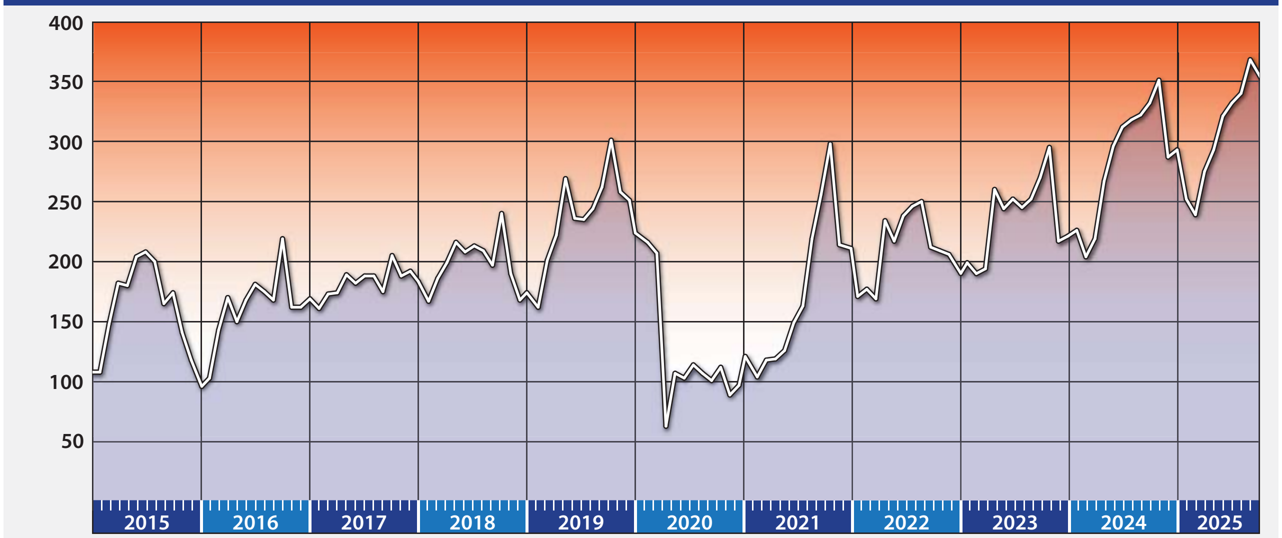
Aircraft	Departures by Aircraft Type	Total Seats	Seats Available Per Departure	Airline Enplanements	BLF
CRJ-200ER/440	3	150	50	48	32.0%
CRJ-700	2,961	197,160	66	163,112	82.7%
CRJ-900	1	76	76	57	75.0%
Embraer ERJ-175	626	44,558	71	34,322	77.0%
Embraer ERJ-145	4	200	50	163	81.5%
Totals:	**3,602**	**242,144**	**–**	**197,702**	**81.6%**

BLF = boarding load factor
Data represent 12 months ending in September 2025 (most current available). As a result, airline enplanements do not match the baseline airline enplanement count, which totaled 200,873, representing 12 months ending in October 2025.
Source: Bureau of Transportation Statistics, T-100 Air Carrier Statistics Database

SEATS AVAILABLE



DEPARTURES



LOAD FACTOR

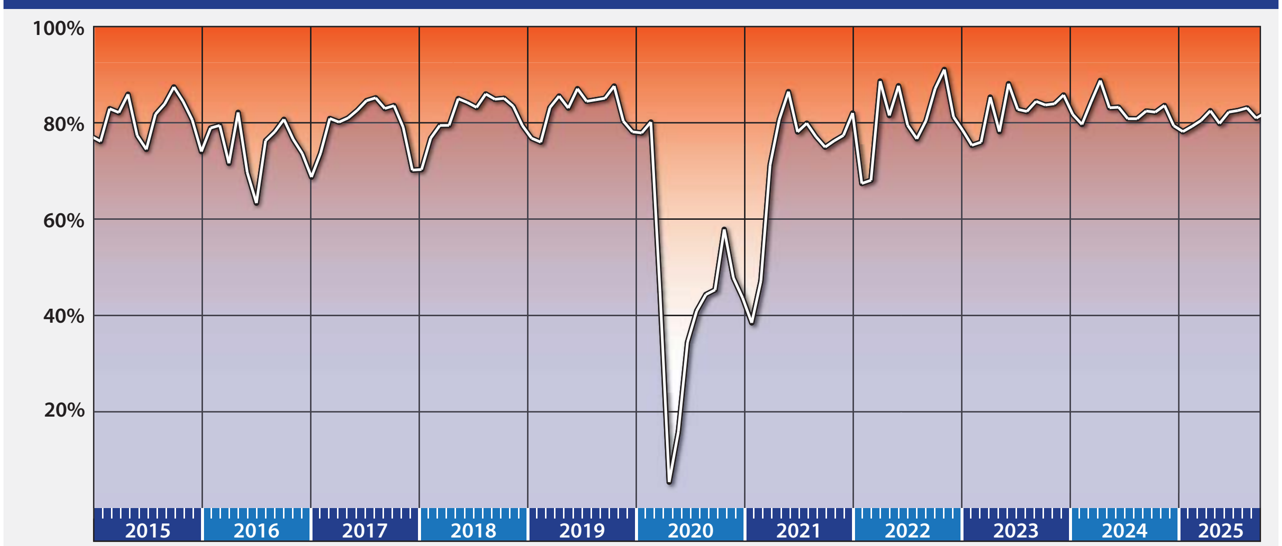


Exhibit 2B
HISTORICAL BOARDING LOAD FACTOR

Table 2U presents the projected airline fleet mix and operations forecast. This analysis requires certain assumptions for aircraft utilization and BLF. In 2015, all airline flights at SAF were conducted using 50-seat regional jets. Since 2022, airlines started to transition away from the 50-seat regional jets in favor of the CRJ700. This transition is referred to as "up-gauging," meaning replacement of older aircraft with newer aircraft that have greater seating capacity. In 2025, over 82 percent of flights were conducted by the CRJ700 and the remainder were handled by the ERJ175, reflecting the up-gauging trend.

TABLE 2U | Airline Operations Fleet Mix Forecast

Seating Capacity	Typical Aircraft	Historical			Forecast		
		2015	2022	2025	2030	2035	2045
150+	A320; B737	0.0%	0.0%	0.0%	0.0%	3.0%	9.0%
100-149	A319	0.0%	0.0%	0.0%	9.0%	15.0%	30.0%
71-100	ERJ175; CRJ900	0.0%	0.0%	17.4%	25.0%	62.0%	61.0%
51-70	CRJ700	0.0%	72.4%	82.6%	66.0%	20.0%	0.0%
41-50	ERJ140/145; CRJ200	100.0%	27.6%	0.0%	0.0%	0.0%	0.0%
	Total:	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**
Total Seats		92,580	152,222	242,144	287,670	322,799	437,776
Avg. Seats per Departure		48	61	67	72	81	95
Boarding Load Factor		81.4%	81.0%	81.6%	82.0%	82.0%	82.0%
Enplaned per Departure		39	49	55	59	66	78
Annual Enplanements		75,389	123,300	197,702	233,900	259,500	357,000
Annual Departures		1,923	2,498	3,602	3,952	3,921	4,573
Annual Operations		3,846	4,996	7,204	7,904	7,842	9,146

Airlines have indicated a desire to expand the fleet to include the Airbus A319, which has a seating capacity of 128 passengers, in the next five years. The 2030 forecast assumes the introduction of the A319 into the fleet with one daily departure. Over time, the forecast assumes continued growth of the average seats per departure to 95 by 2045. This assumes that by 2045, there could be up to four daily departures by an A319 and one daily departure by an A320 or Boeing 737 aircraft with an average seating capacity of 150 passengers. Other considerations, such as the addition of more routes and destinations, are factored in these growth assumptions. The BLF is assumed to remain at approximately 82 percent over the forecast period. As the average seats per departure increase, the total number of commercial operations needed to accommodate the forecasted enplanements increases, but at a much smaller level. While enplanement levels are projected to grow at a CAGR of 2.91 percent, total airline operations are projected to grow at a CAGR of 1.2 percent.

AIRLINE/PASSENGER PEAKS

Airline/passenger peak period forecasts provide an estimate of the current adequacy of terminal building functional areas and when terminal facility improvements may be needed. Terminal building improvement or expansion projects can take years to plan and fund; therefore, it is important to anticipate those needs. Terminal expansion projects are not typically designed around the busiest day of the year; rather, they are designed around a design day or design hour, which is an average of peak days.

The following peaking characteristics have been estimated:

- **Peak month enplanements** – the peak month in the calendar year for enplanements
    - The peak enplanement month of 2025 was October, in which there were 21,539 enplanements, accounting for 12.65 percent of annual enplanements at SAF. Since 2022, the peak month has averaged 10.98 percent of annual enplanements. **Table 2V** summarizes historical monthly enplanements for SAF.

TABLE 2V | Historical Peak Month Enplanements

Month	2022[1]	2023[1]	2024[2]	2025[2]
January	6,895	9,433	10,304	13,428
February	7,166	9,628	10,098	13,010
March	9,070	9,890	11,369	15,470
April	11,618	12,385	13,469	15,838
May	11,585	12,701	15,728	17,937
June	11,556	12,151	17,155	17,631
July	11,586	11,952	17,204	17,903
August	12,296	12,516	17,894	18,955
September	11,040	13,453	18,484	18,596
October	11,493	14,691	19,732	21,539
November	10,175	10,917	15,176	N/A
December	8,993	10,478	15,390	N/A
Total:	**123,473**	**140,195**	**182,003**	**170,307**
Peak Month %:	**9.96%**	**10.48%**	**10.84%**	**12.65%**

2025 data are current through October.

Sources: [1]Bureau of Transportation Statistics, T-100 Air Carrier Statistics Database; [2]Airport records

- **Design day enplanements** – peak month enplanements divided by the number of days in the month
    - Over the last four years, the peak month has had 31 days every year. In three of those years, the peak month was October. The design day is 3.22 percent of the peak month.
- **Design hour enplanements** – calculated by examining the flight schedule during the month of October 2025 to identify peak days
    - In SAF's case, the peak day of the peak month was October 12, on which SAF experienced a total of 28 arrivals and departures. Of those operations, 20 utilized the CRJ700 (66 seats) and eight utilized the ERJ175 (71 seats). During that day, the design hour averaged 135 seats available and 77 enplanements.
- **Design hour deplanements**
    - At SAF, enplanements and deplanements are split approximately 50/50; therefore, the deplanement design hour is the same as the enplanement design hour, which is 77.
- **Total passenger peaks** – combined enplanement and deplanement peaks
- **Airline operations** – the number of operations is based on the published flight

Table 2W summarizes the airline peak periods. These figures will be utilized in the terminal capacity analysis to be presented in Chapter 3.

TABLE 2W | Airline Peak Periods

	FORECAST				
	Factor	2025	2030	2035	2045
Enplanements					
Annual	100%	197,702	233,900	259,500	357,000
Peak Month	10.98%	21,711	25,686	28,497	39,204
Design Day	3.22%	700	829	919	1,265
Design Hour	11.00%	77	91	101	139
Peak Hour	16.00%	112	133	147	202
Total Passenger Peaks					
Annual	100%	395,404	467,800	519,000	714,000
Peak Month	10.98%	43,421	51,372	56,994	78,408
Design Day	3.23%	1,401	1,657	1,839	2,529
Design Hour	7.35%	103	122	135	186
Peak Hour	15.71%	220	260	289	397
Visitor Peak					
Design Hour Visitors	50%	52	61	68	93
Airline Operations					
Annual	100%	7,204	7,904	7,842	9,146
Peak Month	10.40%	749	822	815	951
Design Day	3.20%	24	27	26	31
Peak Day	3.74%	28	31	30	36
Design Hour	8.33%	2	2	2	3
Peak Hour	16.67%	4	5	4	5
Departures					
Design Day	50.00%	12	14	13	16
Peak Hour	16.67%	2	2	2	3
Arrivals					
Design Day	50.00%	12	14	13	16
Peak Hour	25.00%	3	4	3	4
Design/peak hour data from FAA APM Report for SAF on October 12, 2025					

Source: Coffman Associates analysis

The future year forecasts for airline peaks are based on carrying forward the relevant ratios determined for the 2025 base year. The average peak month for enplanements was 10.98 percent of annual enplanements and was carried forward to the plan years. The 2025 design day for enplanements was 3.22 percent of the peak month and was carried forward to the plan years. The design hour for enplanements was 11.00 percent of the design day and the total passenger count was 7.35 percent of the design day, which was carried forward to the plan years.

The visitor peak is an important consideration because many people enter the terminal building with departing passengers or to pick up arriving passengers. It is critical to account for these visitors and their usage of the non-secure public spaces. To account for visitors, a visitor peak ratio (50 percent) is applied to the total design hour passengers.

The peaking characteristics for airline operations are also presented. These are based on actual operations data from 2025.

AIR CARGO FORECASTS

Air cargo includes air freight/express and mail. Air freight and express are handled by passenger airlines and all-cargo airlines. Air mail is now primarily handled by an all-cargo carrier under contract with the U.S. Postal Service. The demand for air cargo is a derived demand resulting from economic activity.

The FAA forecasts revenue ton miles (RTMs). RTMs are a measure of how much revenue a company makes per volume of freight transported, which translates to the revenue earned for transporting one ton of freight across one mile. The FAA makes available a pool of capital development funding to airports with minimum landed weights of 100 million pounds (50,000 tons) of air cargo.

SAF experiences limited air cargo activity. Since 2005, approximately 13,458 total pounds of freight have been reported as enplaned at SAF and no reported freight has been enplaned since 2020; however, cargo activity at SAF is typically represented by on-demand Part 135 charters that utilize general aviation aircraft and are not required to report data to the U.S. Department of Transportation (DOT). An Amazon distribution facility was recently developed near the airport; however, the planning team is not aware of any associated air cargo activities. SAF does not have a dedicated air cargo handling facility for freight storage before loading to and after unloading from aircraft. SAF also does not have on-site U.S. Customs staff, which limits cargo flight operations to domestic U.S. flights. Ultimately, Santa Fe's proximity to Albuquerque limits the potential for air cargo activities at SAF.

AIR CARGO TRENDS

The prominence of FedEx Express and UPS in the domestic cargo market is evident. These integrated express carriers have traditionally handled most air cargo flown between U.S. airports, creating a steady flow of flights and traffic for the airports they serve. In 2023, the U.S. DOT T-100 reported that the two carriers combined accounted for over 60 percent of the volumes of domestic air cargo flown, with FedEx serving over 225 and UPS serving over 100 U.S. airports. For many medium and smaller U.S. airports, securing either FedEx or UPS scheduled service has become a primary source of air cargo volume.

While the initial air express business model was founded on express envelopes and small packages, FedEx and UPS have successfully broadened their air cargo product lines to include specialty cargo, e-commerce, larger packages, and heavy freight, which provide numerous synergy and optimization opportunities with the companies' respective trucking and ground cargo operations.

Over the last eight years, the emergence of e-commerce, with its heavy dependence on current shipment tracking capabilities and seamless operations, fed into the integrators' operational strengths and drove significant new growth. At the outset, major industry e-commerce players like Amazon relied on FedEx and UPS for package distribution; however, Amazon has invested heavily in insourcing those operations and volumes to their own chartered fleets, hubs, and route networks over time. In the process, Amazon has created strong e-commerce marketplace competition for FedEx and UPS. With the influx of new traffic and new competition, UPS managed to increase its US domestic flights by 44 percent over the 10-year 2014–2023 timeframe, while FedEx, which is larger from an air transportation standpoint, generally grew through 2021 but had reduced domestic flight operations by 5.4 percent by 2023 versus 2014.

Between 1990 and 2015, the U.S. domestic air cargo (freight and mail) market was in a state of low growth, achieving just 1.6 percent compound annual growth over 25 years. Although the market is large compared to many other world regions, it had matured and was largely dominated by the duopoly of FedEx Express and UPS. Furthermore, in this timeframe, the increased sophistication and reliability of competitive trucking services in the U.S. hampered air cargo growth, kept pricing in check, and stunted innovation; however, domestic air cargo volumes rose sharply with the growing influence of e-commerce between 2016 and 2018. New entrant Amazon Air was gaining scale with an expanding aircraft fleet and network of U.S. airports. In 2015 (pre-Amazon Air), the segment accounted for 4.9 percent of domestic air cargo. By 2020, the segment (now including Amazon Air) had grown to 21.4 percent of the total.

In the post-pandemic period, the air cargo industry has undergone a pronounced market correction following the exceptional demand conditions experienced during the global health crisis. This correction has resulted in a cyclical downturn characterized by capacity oversupply, normalization of freight rates, and reduced yield margins. Concurrently, evolving trade policies, including the imposition of tariffs and the escalation of trade disputes between the United States and key international trading partners, have introduced additional structural uncertainty. These measures have the potential to materially alter global trade flows, prompting reconfiguration of manufacturing locations, sourcing strategies, and distribution networks. As supply chains continue to adapt to these policy-driven disruptions, the role of air cargo within domestic and cross-border logistics systems may shift, influencing demand patterns, network design, and asset utilization across the U.S. air cargo market.

AIR CARGO PROJECTIONS

A scenario-based approach is the best methodology for forecasting air cargo activity at airports with limited or no historical cargo operations. This methodology is better suited than purely economic or trend-based models for capturing the operational realities that constrain cargo activity at individual airports. This approach is also appropriate when specific types of cargo services are under consideration that may differ substantially from existing operational patterns. As implied by its name, the scenario-based approach relies on the formulation of discrete, well-defined cargo development scenarios, each of which specifies assumptions related to airline participation, aircraft types, service frequency, routing, and phasing over time. Cargo volumes are then estimated based on the operational characteristics embedded within each scenario.

While inherently prospective in nature, the scenario-based approach offers significant value from an airport planning perspective by quantifying plausible ranges of cargo activity that could materialize if certain development pathways are realized. To be effective, scenarios must be grounded in realistic market intelligence and operational constraints while capturing a sufficiently broad range of potential outcomes. This enables airport stakeholders to evaluate infrastructure needs, facility sizing, and investment timing across multiple possible cargo service environments that could emerge during the forecast period.

In this context, two cargo development scenarios were prepared to reflect a range of potential future conditions at the airport. These scenarios include the introduction of new cargo air services by a mainline carrier and a general cargo freighter airline. Collectively, these scenarios represent the primary air cargo operating models currently present in the U.S. market: an integrated express carrier focused on time-definite small-package shipments and a traditional freighter operation handling heavy freight, industrial goods, and outsized cargo.

Mainline Carrier Scenario

This scenario is based on prospective feeder service by one of the major integrated express carriers, FedEx or UPS. Assumptions of this scenario include the following:

- Service operates five flights per week at the initial startup stage in each direction (10 total weekly operations).
- The startup aircraft is the Cessna 208B Super CargoMaster, a single-engine aircraft commonly used in smaller markets. The Cessna 208B has a total freight capacity of 3,300 pounds.
- Up-gauging occurs at the mature stage to the larger Cessna C408 SkyCourier as the airline modernizes its feeder fleet and retires the older C208B. The C408 has a total freight capacity of 6,000 pounds.
- Cargo load factor is assumed at 60 percent of flight capacity in the initial stage, increasing to 75 percent during the mature stage.

This scenario results in initial total annual freight (enplaned and deplaned) of 515 tons and 520 annual operations. By the mature stage, the total annual freight increases to 1,170 tons.

General Cargo Carrier Scenario

The second scenario is based on a type of operation that would serve the freight forwarding community and would not directly compete with an integrated express carrier considered in the first scenario. This scenario is intended to capture the air cargo implications associated with large-scale manufacturing activity that generates time-sensitive, high-value, and relatively heavy freight flows that are not optimally served by small-package express networks.

Freight forwarders function as intermediaries between shippers and transportation providers, coordinating logistics solutions that match shipment characteristics with appropriate modes and carriers. Unlike integrated express carriers, which vertically control their own airline operations, ground networks, and end-to-end logistics platforms, freight forwarders typically procure airlift capacity from third-party all-cargo airlines to meet customer requirements. Historically, this model supported a robust segment of the U.S. domestic air cargo market, particularly for expedited shipments of heavier, bulkier industrial commodities, such as automotive parts, machinery, and manufactured components. Recent developments suggest market conditions may support growth within the scheduled general cargo freighter services in the U.S. domestic market. Ongoing supply chain disruptions, persistent shortages of long-haul truck drivers, increasing highway congestion, and heightened shipper demand for reliability and resilience have renewed interest in alternative freight transportation solutions.

Air cargo, particularly for time-critical industrial shipments, offers a means of mitigating these challenges by providing predictable transit times and network redundancy. Broader macroeconomic trends (including the reshoring and nearshoring of manufacturing activity, increased domestic industrial production, and the development of more geographically dispersed supply chains) are expected to generate new demand for air transportation of general cargo. In this context, a scheduled freighter operation serving freight forwarders could represent a viable long-term cargo development opportunity for SAF, particularly if anchored by a large manufacturing facility.

Assumptions of this scenario include the following:

- Operations are conducted by a Boeing 757-200F, which has a total freight capacity of 79,000 pounds.
- Initial operations of two weekly flights will increase to four weekly flights by the mature stage. This equates to 208 annual operations in the initial stage and 416 annual operations by the mature stage.
- Estimated cargo load factors of 20 percent in the initial stage will increase to 50 percent by the mature stage.

This scenario results in initial total annual freight (enplaned and deplaned) of 1,643 tons and 208 annual operations. By the mature stage, the total annual freight increases to 8,216 tons with 416 annual operations.

Both air cargo scenarios are summarized in **Table 2X**. Because these scenarios are entirely speculative, they are included for informational purposes only and will not be included in the overall operational forecast summary.

TABLE 2X | Air Cargo Scenario Forecasts

Stage	Frequency	Aircraft	Freight Capacity (lbs)	Cargo Load Factor	Total Annual Freight (tons) Enplaned/Deplaned	Total Operations
Scenario 1 – Mainline Carrier Scenario						
Initial	5 flights/week	Cessna 208B	3,300	60%	515	520
Mature	5 flights/week	Cessna 408	6,000	75%	1,170	520
Scenario 2 – General Cargo Freighter						
Initial	2 flights/week	B757-200F	79,000	20%	1,643	208
Mature	4 flights/week	B757-200F	79,000	50%	8,216	416

Source: Coffman Associates analysis

GENERAL AVIATION FORECASTS

General aviation encompasses all portions of civil aviation except commercial service and military operations. To determine the types and sizes of facilities that should be planned to accommodate general aviation activity at SAF, certain elements of this activity must be forecasted. These indicators of general aviation demand include based aircraft, aircraft fleet mix, and annual operations.

BASED AIRCRAFT FORECAST

The number of aircraft based at an airport is the most basic indicator of general aviation demand. The numbers and types of aircraft based at an airport may influence the need for hangars and other facilities, as well as the applicable airport design standards. The applicable design standards may include separation distances and object-clearing surfaces. The addition of numerous small aircraft may have no effect on design standards, while the addition of a few larger business jets can have a substantial impact.

Because of the numerous variables known to influence aviation demand, several separate forecasts of based aircraft are developed. Each forecast is then examined for reasonableness and any outliers are discarded or given less weight. The remaining forecasts will collectively create a planning envelope. A single planning forecast is then selected for use in developing facility needs for the airport. The selected forecast of based aircraft can be one of the several developed forecasts or a blend of them.

The process for developing forecasts of based aircraft begins with an analysis of aircraft ownership in the primary general aviation service area. This is done through a review of historical aircraft registrations and a projection thereof. Once a registered aircraft projection is developed, it can be used as one input for developing the based aircraft forecasts.

As of 2025, there are 179 aircraft based at SAF, according to the airport's FAA Form 5010-1. The fleet mix includes 130 single-engine aircraft, 22 turboprops, 23 business jets, and four helicopters.

Registered Aircraft Projections

Aircraft ownership trends for the primary service area will influence the based aircraft trends for an airport. For general aviation activity, the primary service area is Santa Fe County. As of 2025, there are 245 aircraft registered in the county, as shown in **Table 2Y**. Not all aircraft registered in one county will be based at an airport in that county. Typically, the number of aircraft registered in a particular county but based at a more distant airport balances the number of aircraft owners who registered their aircraft elsewhere but base them at the subject airport.

TABLE 2Y | Santa Fe County Registered Aircraft

Year	Single-Engine Piston[1]	Multi-Engine Piston	Helicopter	Turboprop	Jet	Electric/UAV	Other	Total
2015	215	15	5	12	11	0	40	298
2016	210	14	4	11	10	0	40	289
2017	199	13	4	11	12	0	40	273
2018	196	12	2	13	13	0	34	267
2019	191	14	2	15	14	1	31	267
2020	187	12	2	16	12	1	30	258
2021	183	11	3	16	11	1	28	255
2022	177	10	5	14	12	1	30	251
2023	174	11	5	11	13	2	32	246
2024	163	11	6	9	14	2	30	239
2025*	167	12	6	11	15	1	34	245

[1]Includes gliders, balloons, ultralights, and kit planes
*2025 data through September 23, 2025
Source: FAA aircraft registration database

Over the last 10 years, as many as 289 aircraft have been registered in Santa Fe County. With 179 aircraft currently based at the airport, approximately 73 percent of county aircraft registrations are based at SAF (in aggregate). By developing a registered aircraft forecast, the data can be utilized as an input to the based aircraft projection models.

Table 2Z shows six different registered aircraft forecasts for Santa Fe County. The first considers the FAA TAF (published in January 2025) for SAF, which includes a based aircraft projection with a CAGR of 1.60 percent. By applying this growth rate to the 2025 registered aircraft base line figure, a forecast emerges.

TABLE 2Z | Santa Fe County Registered Aircraft Forecasts

Projection	2025	2030	2035	2045	CAGR (2025–2045)
SAF TAF Growth Rate for Based Aircraft	245	265	287	336	1.60%
Statewide TAF Growth Rate for Based Aircraft	245	256	267	291	0.87%
Population Growth Rate	245	253	261	277	0.62%
Employment Growth Rate	245	254	264	285	0.76%
Income Growth Rate	245	300	367	551	4.13%
FAA Forecast Growth Rate for Active Aircraft	245	251	258	271	0.50%
Selected Forecast	**245**	**251**	**258**	**271**	**0.50%**

CAGR = compound annual growth rate

Source: Coffman Associates analysis

The next forecast considers the TAF growth rate in based aircraft for the state of New Mexico, which has a CAGR of 0.87 percent. A forecast results from applying this growth rate to the 2025 base year figure.

Three registered aircraft forecasts were developed utilizing Santa Fe County's projected growth rate for population, employment, and income. A final forecast for registered aircraft was developed by applying the FAA's national growth rate projection for active general aviation aircraft, which is 0.50 percent.

While each of these six forecasts appears reasonable and any one of them could be used as the selected forecast, it is the opinion of the forecast analyst that the forecast that applies the FAA's growth rate for the national fleet of general aviation aircraft is best for planning purposes. This forecast results in a modest growth rate of 0.50 percent, which is consistent with the historical number of aircraft registered in the county.

Based Aircraft Projections

Several based aircraft forecasts are presented in **Table 2AA**. In 2025, SAF's 179 based aircraft represented 73.06 percent of the registered aircraft in Santa Fe County. The first forecast considers maintaining this market share, which results in the addition of 21 based aircraft over the next 20 years and a CAGR of 0.51 percent.

The second and third based aircraft forecasts consider the airport capturing a mid-range and high-range increasing market share of county registered aircraft. The mid-range forecast results in 217 based aircraft by 2045 and a CAGR of 0.97 percent. The high-range forecast results in a CAGR of 1.41 percent, increasing based aircraft to 237 by 2045.

The fourth forecast presented applies the statewide CAGR for based aircraft (0.87%). This forecast results in 213 based aircraft by 2045: an addition of 34 based aircraft over the next 20 years. The final forecast applies the annual growth rate of the TAF for the airport (1.60%). This forecast results in 252 based aircraft by 2045, which is an increase of 79 based aircraft by the end of the planning period.

TABLE 2AA | Based Aircraft Forecasts

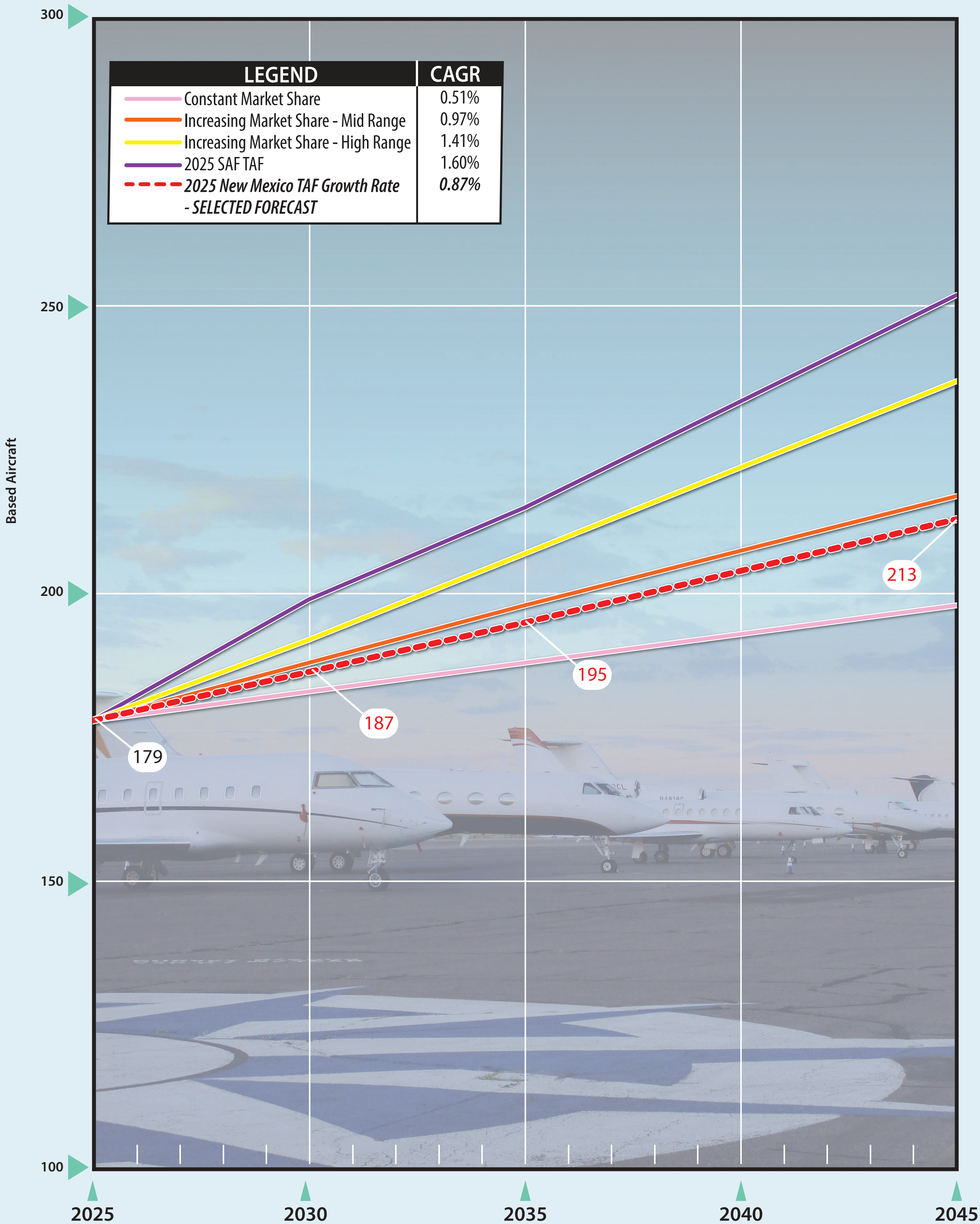
Year	SAF Based Aircraft	Santa Fe County Registered Aircraft	Market Share
2025*	179	245	73.06%
Constant Market Share			
2030	183	251	73.06%
2035	188	258	73.06%
2045	198	271	73.06%
CAGR	**0.51%**	–	–
Increasing Market Share - Mid Range			
2030	188	251	74.84%
2035	198	258	76.63%
2045	217	271	80.19%
CAGR	**0.97%**	–	–
Increasing Market Share - High Range			
2030	192	251	76.63%
2035	207	258	80.19%
2045	237	271	87.32%
CAGR	**1.41%**	–	–
2025 New Mexico TAF Growth Rate (Selected Forecast)			
2030	187	251	74.46%
2035	195	258	75.64%
2045	213	271	78.51%
CAGR	**0.87%**	–	–
2025 SAF TAF Growth Rate			
2030	199	251	79.09%
2035	215	258	83.29%
2045	252	271	92.91%
CAGR	**1.60%**	–	–

CAGR = compound annual growth rate
TAF = Terminal Area Forecast
Source: Coffman Associates analysis

As depicted on **Exhibit 2C**, the forecasts produced a planning envelop that ranges from 198 to 252 based aircraft on the airport by 2045. With trends observed in aircraft ownership at the local and national levels, it is reasonable to assume a moderate growth rate for based aircraft at SAF; therefore, the forecast that applies the statewide annual growth rate has been selected as the preferred projection. The following is the recommended based aircraft forecast to be carried through for planning purposes:

- 2025 – 179 based aircraft
- 2030 – 187 based aircraft
- 2035 – 195 based aircraft
- 2045 – 213 based aircraft

SAF Based Aircraft Forecasts



CAGR: Compound Annual Growth Rate

BASED AIRCRAFT FLEET MIX

The fleet mix of based aircraft is often more important to airport planning and design than the total number of aircraft. For example, the presence of one or a few large business jets can impact design standards for the runway and taxiway system more than a large number of smaller single-engine piston-powered aircraft.

The based aircraft fleet mix forecast for SAF is presented in **Table 2BB**. It was developed based on local aircraft type usage and national trends as presented in *FAA Aerospace Forecasts – Fiscal Years 2025–2045*. The FAA expects turboprops and business jets will continue to be the fastest growing general aviation aircraft types in the future.

TABLE 2BB | Based Aircraft Fleet Mix

Aircraft Type	EXISTING		FORECAST					
	2025	%	2030	%	2035	%	2045	%
Single-Engine Piston	130	72.6%	132	70.6%	134	68.7%	138	64.8%
Multi-Engine Piston	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Turboprop	22	12.3%	24	12.8%	25	12.8%	28	13.1%
Jet	23	12.8%	26	13.9%	31	15.9%	40	18.8%
Helicopter	4	2.2%	5	2.7%	5	2.6%	7	3.3%
Totals:	179	100.0%	187	100.0%	195	100.0%	213	100.0%

Source: FAA Form 5010; Coffman Associates analysis

GENERAL AVIATION (GA) OPERATIONS

GA operations include a wide range of activities, from recreational use to business and corporate uses. Each GA operation is classified by the airport traffic control tower (ATCT) as either *local* or *itinerant*. A local operation is a takeoff or landing performed by an aircraft that operates within sight of an airport or executes simulated approaches or touch-and-go operations at an airport. Itinerant operations are those performed by aircraft with specific origins or destinations away from an airport. Generally, local operations are characterized by training operations. Typically, itinerant operations increase with business and commercial use because business aircraft are typically operated at a higher frequency.

Table 2CC summarizes the itinerant and local GA operations at the airport since 2015. The 2025 baseline count represents the 12-month period ending in October 2025. As of 2025, itinerant GA operations represent approximately 60 percent of total GA operations and local GA operations represent 40 percent of the total.

Over the last 10 years, a cyclical trend has been observed for itinerant and local GA operations at SAF. Since 2015, there has been an overall -7.8 percent CAGR in GA operations. culminating in a substantial decrease in 2020 due to the COVID-19 pandemic. In 2021, GA operations began to rise again, reaching over 22,000 itinerant operations and over 21,000 local operations; however, GA activity has declined each year since then.

TABLE 2CC | Historical General Aviation Operations

Year	Itinerant	% of Total	Local	% of Total	Total	Year-Over-Year Percent Change +/-
2015	22,781	40.8%	33,119	59.2%	55,900	N/A
2016	26,027	48.6%	27,504	51.4%	53,531	-4.2%
2017	25,396	53.2%	22,309	46.8%	47,705	-10.9%
2018	25,542	51.2%	24,359	48.8%	49,901	4.6%
2019	23,091	49.8%	23,277	50.2%	46,368	-7.1%
2020	18,248	49.5%	18,581	50.5%	36,829	-20.6%
2021	22,269	51.5%	21,002	48.5%	43,271	17.5%
2022	21,418	53.3%	18,729	46.7%	40,147	-7.2%
2023	19,610	55.4%	15,802	44.6%	35,412	-11.8%
2024	18,437	52.8%	16,508	47.2%	34,945	-1.3%
2025*	15,130	60.9%	9,702	39.1%	24,832	-28.9%

*2025 data represent 12 months ending in October 2025

Source: OPSNET FAA database of SAF tower counts

Table 2DD presents several types of GA operations forecasts, as well as the 2025 SAF TAF (published in January 2025). It should be noted that the forecasts will be split between itinerant and local operations. The first forecast displays itinerant and local operations data directly from the SAF TAF that was published in January 2025. The TAF results in an increase in itinerant GA operations from 15,130 to 23,453 and an increase in local GA operations from 9,702 to 18,894 by 2045. The respective CAGRs produced are 2.22 percent and 3.39 percent.

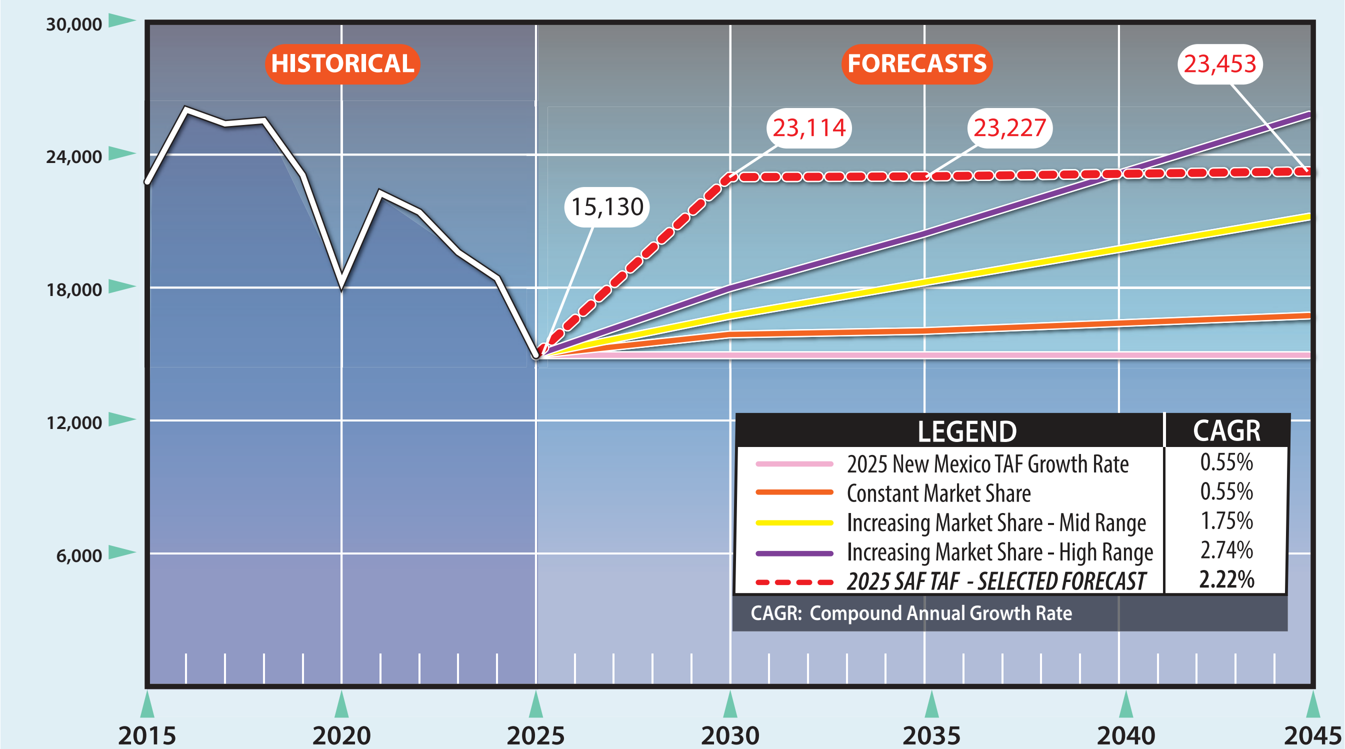
A second forecast applies the statewide TAF growth rate for itinerant (0.56%) and local GA (0.48%) operations. This forecast results in growth to 16,900 itinerant GA operations and 10,700 local GA operations by 2045.

The third forecast of GA operations considers maintaining the market shares (0.099 percent for itinerant operations and 0.059 percent for local operations) of the base year counts through the plan years. For itinerant operations, this results in a CAGR of 0.55 percent and a total of 16,900 operations by 2045. For local operations, this results in a CAGR of 0.54 percent and a total of 10,800 operations by 2045.

The final two GA operations forecasts were developed utilizing a high-range market share based on a return to the average market share over the previous 10 years and a mid-range market share based on the median market share percentage between the high-range projection and the constant market share projection. In terms of itinerant operations, the high-range projection results in a CAGR of 2.74 percent, which equates to 26,000 operations by 2045, and the mid-range projection results in a CAGR of 1.75 percent, which equates to 21,400 operations by 2045. For local operations, the high-range projection produces a CAGR of 5.35 percent, resulting in 27,500 operations by 2045, and the mid-range projection produces a CAGR of 3.44 percent, resulting in 19,100 operations by 2045.

The selected forecasts for GA itinerant and local operations are the ones presented in the SAF TAF, resulting in growth rates of 2.22 percent for itinerant operations and 3.39 percent for local operations. These forecasts have been selected because they display moderate growth in line with state and national trends, as well as a return to operational levels experienced within the previous five years. **Exhibit 2D** graphically depicts the general aviation operations planning envelopes created by several types of forecasts, including the selected forecasts.

GA Itinerant Operations Forecasts



GA Local Operations Forecasts

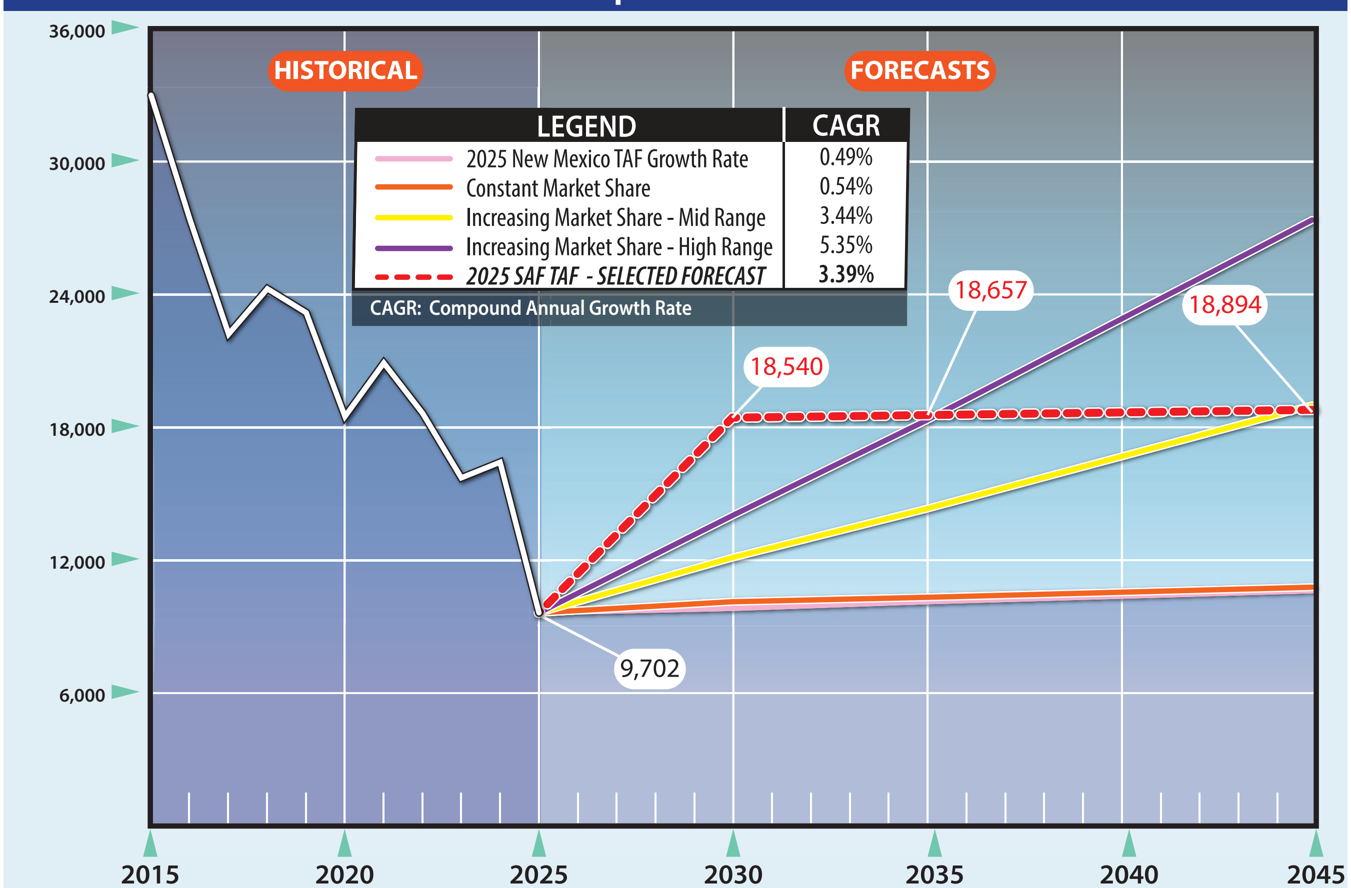


Exhibit 2D
GENERAL AVIATION OPERATIONS FORECASTS

TABLE 2DD | General Aviation Operations Forecasts

Year	SAF GA Itinerant Operations	U.S. GA Itinerant Operations	Market Share	SAF GA Local Operations	U.S. GA Local Operations	Market Share
2015	22,781	13,856,535	0.164%	33,119	11,679,293	0.284%
2016	26,027	13,930,865	0.187%	27,504	11,629,923	0.236%
2017	25,396	13,933,523	0.182%	22,309	11,842,865	0.188%
2018	25,542	14,067,161	0.182%	24,359	12,510,742	0.195%
2019	23,091	14,385,032	0.161%	23,277	13,295,230	0.175%
2020	18,248	12,333,442	0.148%	18,581	12,366,299	0.150%
2021	22,269	14,108,432	0.158%	21,002	13,452,474	0.156%
2022	21,418	14,561,684	0.147%	18,729	14,295,966	0.131%
2023	19,610	14,750,592	0.133%	15,802	15,612,433	0.101%
2024	18,437	14,960,608	0.123%	16,508	16,033,779	0.103%
2025*	15,130	15,347,621	0.099%	9,702	16,456,234	0.059%
2025 SAF TAF						
2030	23,114	16,180,379	0.143%	18,540	17,288,895	0.107%
2035	23,227	16,419,483	0.141%	18,657	17,620,607	0.106%
2045	23,453	17,105,516	0.137%	18,894	18,315,572	0.103%
CAGR	**2.22%**	–	–	**3.39%**	–	–
2025 New Mexico TAF Growth Rate						
2030	15,600	16,180,379	0.096%	9,900	17,288,895	0.057%
2035	16,000	16,419,483	0.097%	10,200	17,620,607	0.058%
2045	16,900	17,105,516	0.099%	10,700	18,315,572	0.058%
CAGR	**0.55%**	–	–	**0.49%**	–	–
Constant Market Share						
2030	16,000	16,180,379	0.099%	10,200	17,288,895	0.059%
2035	16,200	16,419,483	0.099%	10,400	17,620,607	0.059%
2045	16,900	17,105,516	0.099%	10,800	18,315,572	0.059%
CAGR	**0.55%**	–	–	**0.54%**	–	–
Increasing Market Share – Mid Range						
2030	17,000	16,180,379	0.105%	12,200	17,288,895	0.070%
2035	18,400	16,419,483	0.112%	14,400	17,620,607	0.082%
2045	21,400	17,105,516	0.125%	19,100	18,315,572	0.104%
CAGR	**1.75%**	–	–	**3.44%**	–	–
Increasing Market Share – High Range						
2030	18,100	16,180,379	0.112%	14,100	17,288,895	0.082%
2035	20,600	16,419,483	0.125%	18,400	17,620,607	0.104%
2045	26,000	17,105,516	0.152%	27,500	18,315,572	0.150%
CAGR	**2.74%**	–	–	**5.35%**	–	–

*2025 data represent 12 months ending in October 2025

Source: OPSNET FAA database of SAF tower counts

Other Air Taxi Operations Forecast

Air taxi operations are those with the authority to provide on-demand transportation of persons or property via aircraft with fewer than 60 passenger seats. The air taxi category encompasses a broad range of operations, including some smaller commercial service aircraft, some charter aircraft, air cargo aircraft, many fractional ownership aircraft, and air ambulance services. For example, JSX charter flights, which utilize the 30-seat Embraer 135, are considered "other" air taxi operations. Previously, air taxi operations operated by scheduled airline operators were forecasted; therefore, this section focuses on developing a forecast of all other air taxi operations. **Table 2EE** summarizes historical air taxi operations at SAF.

TABLE 2EE | Historical Air Taxi Operations

Year	Other Air Taxi	Airline Air Taxi	Total Air Taxi
2015	4,121	3,846	7,967
2016	3,812	3,738	7,550
2017	2,102	3,556	5,658
2018	3,549	1,988	5,537
2019	2,322	2,062	4,384
2020	3,137	530	3,667
2021	4,803	1,020	5,823
2022	5,650	788	6,438
2023	4,271	1,996	6,267
2024	5,277	920	6,197
2025	6,251	14	6,265
CAGR	4.3%	-43.0%	-2.4%

Sources: FAA OPSNET; Bureau of Transportation Statistics, T-100 Air Carrier Statistics Database

Two other air taxi forecasts are presented in **Table 2FF**. The first applies the 10-year CAGR of 4.3 percent to the forecast period, resulting in 14,400 annual other air taxi operations by 2045. The second applies a trend line regression forecast, which results in a CAGR of 2.8 percent and 10,900 other air taxi operations by 2045. For the purposes of the master plan, the more modest trend line forecast has been selected. The 2.8 percent CAGR is reflective of the historical growth rate prior to the introduction of JSX in 2025. The forecast allows for continued growth within the category, including for JSX's activities.

TABLE 2FF | Other Air Taxi Operations Forecasts

Forecasts	2025	2030	2035	2045	CAGR
Historical Growth Rate	6,251	7,700	9,500	14,400	4.3%
Trend Line Forecast – Selected	6,251	6,800	8,200	10,900	2.8%

Source: Coffman Associates analysis

Military Operations

Military aircraft can (and do) utilize civilian airports across the country. SAF experiences activity by military aircraft, especially because SAF is the home of the New Mexico Army National Guard (NMANG). Forecasts of military activity are inherently difficult to develop because of the national security nature of their operations and the fact that their missions can change without notice; thus, it is typical for the FAA to use a flat line number for military operations in the TAF. At SAF, the TAF reports 2,314 itinerant and 1,141 local operations annually for each year of the 20-year planning horizon. These estimates for military operations will be carried forward in this master plan. **Table 2GG** summarizes the history of military operations at SAF and shows the operations estimated in the future from the TAF.

TABLE 2GG | Military Operations Forecast

Year	Military Itinerant	Military Local	Total
2015	2,683	2,915	5,598
2016	3,141	2,868	6,009
2017	2,467	1,335	3,802
2018	2,472	1,310	3,782
2019	2,260	1,661	3,921

(Continues)

TABLE 2GG | Military Operations Forecast (continued)			
Year	**Military Itinerant**	**Military Local**	**Total**
2020	2,527	1,551	4,078
2021	1,697	684	2,381
2022	1,683	967	2,650
2023	2,235	953	3,188
2024	2,305	1,589	3,894
2025*	2,144	1,516	3,660
Military Operations Forecast (CAGR – 0.0%)			
2030	2,314	1,141	3,455
2035	2,314	1,141	3,455
2045	2,314	1,141	3,455

CAGR = compound annual growth rate
*2025 data represent 12 months ending in October 2025
Forecast is derived from the 2025 SAF *Terminal Area Forecast* (TAF)
Sources: FAA OPSNET; FAA Terminal Area Forecast, January 2025

Total Operations Forecast Summary

Each operational element was individually forecasted. **Table 2HH** presents a summary of the operations forecasted to be utilized in this master plan. Overall, total operations are projected to increase from 40,647 in 2025 to 65,848 by 2045 at a CAGR of 2.44 percent.

TABLE 2HH | Total Operations Forecast Summary

Year	Itinerant Operations				Local Operations		Total Operations
	Air Carrier	Air Taxi	GA	MIL	GA	MIL	
2025	5,890	6,265	15,130	2,144	9,702	1,516	40,647
2030	7,904	6,800	23,114	2,314	18,540	1,141	59,813
2035	7,842	8,200	23,227	2,314	18,657	1,141	61,381
2045	9,146	10,900	23,453	2,314	18,894	1,141	65,848
CAGR	**2.22%**	**2.81%**	**2.22%**	**0.38%**	**3.39%**	**-1.41%**	**2.44%**

CAGR = compound annual growth rate
GA = general aviation
MIL = military
Source: Coffman Associates analysis

OPERATIONS PEAKING FORECAST

Many aspects of facility planning relate to levels of peaking activity (times when an airport is busiest). For example, the appropriate size of terminal facilities can be estimated by determining the number of people that could reasonably be expected to use the facility at a given time. The following planning definitions apply to the peak periods:

- Peak month – the month within the calendar year when peak aircraft operations occur
- Design day – the average day in the peak month
- Busy day – the busy day of a typical week in the peak month
- Design hour – the average peak hour within the design day of a typical week in the peak month
- Peak hour – the busiest hour during the design day

Peak Month

The peak month is an absolute peak within a given year. In 2025, the peak month was August, with 3,681 operations, which represented 10.4 percent of annual operations. Over the past four years, the peak month has averaged 10.2 percent of annual operations. All other peak periods will be exceeded at various times during the year. The peak period forecasts represent reasonable planning standards that can be applied without overbuilding or being too restrictive. The method for forecasting the peak operational parameters was to first determine the peak parameters for the base year of 2025 utilizing control tower records. From this analysis, appropriate factors can be applied to the forecast years.

Design Day

The design day was determined by dividing peak month operations by the number of days in the month. There are 31 days in August; therefore, the design day is 119 operations.

Busy Day

Certain terminal facility needs are determined using the busy day calculation. The busy day is not an absolute peak day; it is an average of peak days within each week of the peak month. For this analysis, the most recent month available was August 2025. The busy day is established through the following process:

1. The peak days are identified within each seven-day week of the peak month. The busiest days for each week of August 2025 totaled 140, 169, 157, and 189 operations.
2. The 28-day operations total is identified within the peak month (four complete weeks), which is 3,499. Three days were not used in this analysis because only complete seven-day weeks are used. Total operations for the month were 3,681.
3. The busy day is 18.7 percent of weekly operations, calculated as the sum of the peak days (655) divided by the 28-day total (3,499).
4. A busy day factor is calculated by multiplying the busy day percent (18.7 percent) by the number of days in the week (seven), which results in a busy day factor of 1.31.
5. The busy day factor is multiplied by the design day to arrive at the busy day operations.

Design Hour

The design hour is determined through an examination of the hourly operations of the peak days of the peak month. Hourly operational data for August 2025 were utilized for this analysis. The design hour is calculated by averaging the number of operations per hour during the peak day of each week of the peak month, which equals approximately seven percent of design day operations.

Peak Hour

The busiest hour during the peak month was found to occur in the morning between 6:00 a.m. and 7:00 a.m. The busiest hour represented 26.4 percent of design day operations.

Table 2JJ summarizes the key peaking operations parameters. A calculation factor was determined for each peaking parameter based on 2025 tower operations counts. That factor was then applied to the five-year, 10-year, and 20-year planning horizons. The operational peak month for 2025 is August (3,681 operations), which represented 10.4 percent of annual operations. The design day is 119 operations, which is 3.2 percent of the peak month. The busy day is 156, which was determined to be 131 percent of the design day. The design hour of eight is seven percent of the design day. The peak hour is the peak hour of the peak month, which represented 26.4 percent of the design day.

TABLE 2JJ | Peak Operations Forecast

Peaking Parameter	Factor	2025	2030	2035	2045
Annual Operations	100% of tower count	40,647	59,813	61,381	65,848
Peak Month	10.4% of annual operations	3,681	6,221	6,384	6,848
Design Day	3.2% of peak month	119	201	206	221
Busy Day	131% of design day	156	263	270	290
Design Hour	7% of design day	8	14	15	16
Peak Hour	26.4% of design day	31	53	54	58

Source: FAA OPSNET, daily and hourly operational data for the month of August 2025

FORECAST SUMMARY

This chapter has outlined the various activity levels that might reasonably be anticipated over the planning period. **Exhibit 2E** presents a summary of the aviation demand forecasts prepared in this chapter. The base year for these forecasts is 2025 with a 20-year planning horizon to 2045. Several forecasts for each aviation demand indicator were developed to create a range of reasonable forecasts, from which a single forecast was selected for use in this master plan.

In 2025 (12 months ending in October 2025), SAF experienced 202,405 passenger enplanements. This marked the first time the airport had exceeded 200,000 enplanements. The airport is forecasted to continue to experience increasing enplanements over the planning period, which will be driven by expansion of the terminal building to allow for additional routes, an increase in the frequency of routes, and a transition to larger aircraft (up-gauging). By 2045, enplanements are forecasted to reach 359,000.

Commercial operations are projected to increase as new routes and additional flights are added. The operational fleet mix accounts for a transition to larger narrowbody aircraft, including the Airbus A319, in the short term, as well as the potential to include Airbus A320 and Boeing 737 aircraft by the intermediate and long-term periods.

General aviation activity dropped off in 2025, representing approximately 61.1 percent of total airport operations. It is anticipated that general aviation will return to levels experienced at SAF in the recent past, reflective of national trends and as based aircraft numbers increase.

Total operations are projected to increase from 40,647 in 2025 to 65,848 in 2045. Based aircraft are forecasted to increase from 179 in 2025 to 213 by 2045.

	BASE	FORECAST			CAGR
	2025	2030	2035	2045	2025-2045
ENPLANEMENTS	**202,405**	**235,900**	**261,500**	**359,000**	**2.9%**
ANNUAL OPERATIONS					
Itinerant					
Air Carrier (60+ Seats)	5,890	7,904	7,842	9,146	2.2%
Air Taxi (<60 Seats)	6,265	6,800	8,200	10,900	2.8%
General Aviation	15,130	23,114	23,227	23,453	2.2%
Military	2,144	2,314	2,314	2,314	0.4%
Itinerant Subtotal	*29,429*	*40,132*	*41,583*	*45,813*	*2.2%*
Local					
General Aviation	9,702	18,540	18,657	18,894	3.4%
Military	1,516	1,141	1,141	1,141	-1.4%
Local Subtotal	*11,218*	*19,681*	*19,798*	*20,035*	*2.9%*
Total Operations	**40,647**	**59,813**	**61,381**	**65,848**	**2.4%**

BASED AIRCRAFT					
Single-Engine Piston	130	132	134	138	0.3%
Multi-Engine Piston	0	0	0	0	N/A
Turboprop	22	24	25	28	1.2%
Jet	23	26	31	40	2.8%
Helicopter	4	5	5	7	2.8%
Total Based Aircraft	**179**	**187**	**195**	**213**	**0.9%**

PEAKING ACTIVITY PROJECTIONS					
AIRLINE PASSENGER ACTIVITY					
Annual Enplanements	197,702	233,900	259,500	357,000	3.0%
Peak Month Enplanements	21,711	25,686	28,497	39,204	3.0%
Design Day Enplanements	700	829	919	1,265	3.0%
Design Hour Enplanements	77	91	101	139	3.0%
AIRLINE OPERATIONS					
Annual Operations	7,204	7,904	7,842	9,146	1.2%
Peak Month	749	822	815	951	1.2%
Design Day	24	27	26	31	1.3%
Design Hour	2	2	2	3	2.0%
TOTAL AIRPORT OPERATIONS					
Annual Operations	40,647	59,813	61,381	65,848	2.4%
Peak Month	3,681	6,221	6,384	6,848	3.2%
Design Day	119	201	206	221	3.1%
Busy Day	156	263	270	290	3.1%
Design Hour	8	14	15	16	3.5%

CAGR: Compound annual growth rate

Exhibit 2E
FORECAST SUMMARY

Projections of aviation demand will be influenced by unforeseen factors and events in the future. In the recent past, factors such as terrorist attacks, economic recession, and the COVID-19 pandemic have impacted aviation demand; nevertheless, the forecasts developed for this planning effort are considered reasonable for planning purposes. The FAA will review and, if acceptable, approve these forecasts for planning purposes.

FORECAST COMPARISON TO THE FAA TAF

When reviewing airport master plan forecasts, the FAA compares them to the most recent TAF for consistency. To be consistent with the TAF, the master plan forecasts should differ by 10 percent or less in the first five years and 15 percent or less in the 10-year timeframe. If the forecasts are not consistent with these parameters, further discussion with the local FAA Airports District Office (ADO) will be required. Ultimately, the forecasts may be forwarded to the FAA headquarters in Washington, D.C., for further review. Deviation from these thresholds will require specific local documentation.

Table 2KK presents a comparison of the master plan forecasts and the FAA TAF (published in January 2025) for passenger enplanements, commercial operations, total operations, and based aircraft. The percentage difference is the absolute value of the difference between the two numbers divided by the average of the two numbers. The base year was established as 2025.

TABLE 2KK | Forecast Comparison to the 2025 FAA Terminal Area Forecast (TAF)

	2025	2030	2035	2045	CAGR
Passenger Enplanements					
Master Plan Forecast	202,405	235,900	261,500	359,000	2.91%
FAA TAF 2025[1]	199,834	214,881	228,396	256,829	1.26%
% Difference:	**1.3%**	**9.3%**	**13.5%**	**33.2%**	–
Commercial Operations (Air Carrier/Air Taxi)					
Master Plan Forecast	12,155	14,704	16,042	20,046	2.53%
FAA TAF 2025[1]	12,196	13,283	14,061	15,716	1.28%
% Difference:	**0.3%**	**10.2%**	**13.2%**	**24.2%**	–
Total Operations					
Master Plan Forecast	40,647	59,813	61,381	65,848	2.44%
FAA TAF 2025[1]	51,433	58,392	59,400	61,518	0.90%
% Difference:	**23.4%**	**2.4%**	**3.3%**	**6.8%**	–
Based Aircraft					
Master Plan Forecast	179	187	195	213	0.87%
FAA TAF 2025[1]	193	208	223	265	1.60%
% Difference:	**7.5%**	**10.6%**	**13.4%**	**21.8%**	–

CAGR = compound annual growth rate

Source: [1]FAA Terminal Area Forecast published in January 2025

Enplanements

In 2025, the airport documented a total of 202,405 enplanements. The TAF enplanement number of 199,834 is 1.3 percent below the actual number of enplanements. The TAF is based on the federal fiscal year and the 2025 TAF figure is an estimate. The enplanement forecast is within TAF tolerance for the five- and 10-year timeframes.

Commercial Operations

The 2025 TAF estimated 36,650 commercial operations (air carrier and air taxi) for 2025. According to tower operational counts, there were 12,155 actual commercial operations in 2025. The master plan commercial operations forecasts are within TAF tolerances.

Total Operations

The 2025 TAF estimate for total operations is 23.4 percent higher than the actual count from tower records. The total operations forecast was developed by individually forecasting each category (air carrier, air taxi, general aviation, and military) and then combining them to arrive at a total operations forecast. The total operations forecast is within TAF tolerances.

Based Aircraft

The current based aircraft count of 179 is 7.5 percent below the FAA TAF estimate for 2025. The based aircraft forecast is within the FAA TAF tolerances.

AIRCRAFT/AIRPORT/RUNWAY CLASSIFICATION

The FAA has established several aircraft classification systems that group aircraft types based on their performance (approach speed when in landing configuration) and design characteristics (wingspan and landing gear configuration). These classification systems are used to determine the appropriate airport design standards for specific airport elements, such as runways, taxiways, taxilanes, and aprons.

AIRCRAFT CLASSIFICATION

The selection of appropriate FAA design standards for the development and location of airport facilities is based primarily on the characteristics of the aircraft currently using or expected to use an airport. The critical aircraft is used to define the design parameters for an airport. The design aircraft may be a single aircraft type or a composite aircraft representing a collection of aircraft with similar characteristics. The design aircraft is classified by three parameters: aircraft approach category (AAC), airplane design group (ADG), and taxiway design group (TDG). FAA AC 150/5300-13B, *Airport Design*, describes the following airplane classification systems, the parameters of which are presented on **Exhibit 2F**.

Aircraft Approach Category (AAC)

The AAC is a grouping of aircraft based on a reference landing speed (V_{REF}), if specified, or if V_{REF} is not specified, 1.3 times stall speed (V_{SO}) at the maximum certificated landing weight. V_{REF}, V_{SO}, and the maximum certificated landing weight are values established for the aircraft by the certification authority of the country of registry.

AIRCRAFT APPROACH CATEGORY (AAC)

Category	Approach Speed
A	Less than 91 knots
B	91 knots or more but less than 121 knots
C	121 knots or more but less than 141 knots
D	141 knots or more but less than 166 knots
E	166 knots or more

AIRPLANE DESIGN GROUP (ADG)

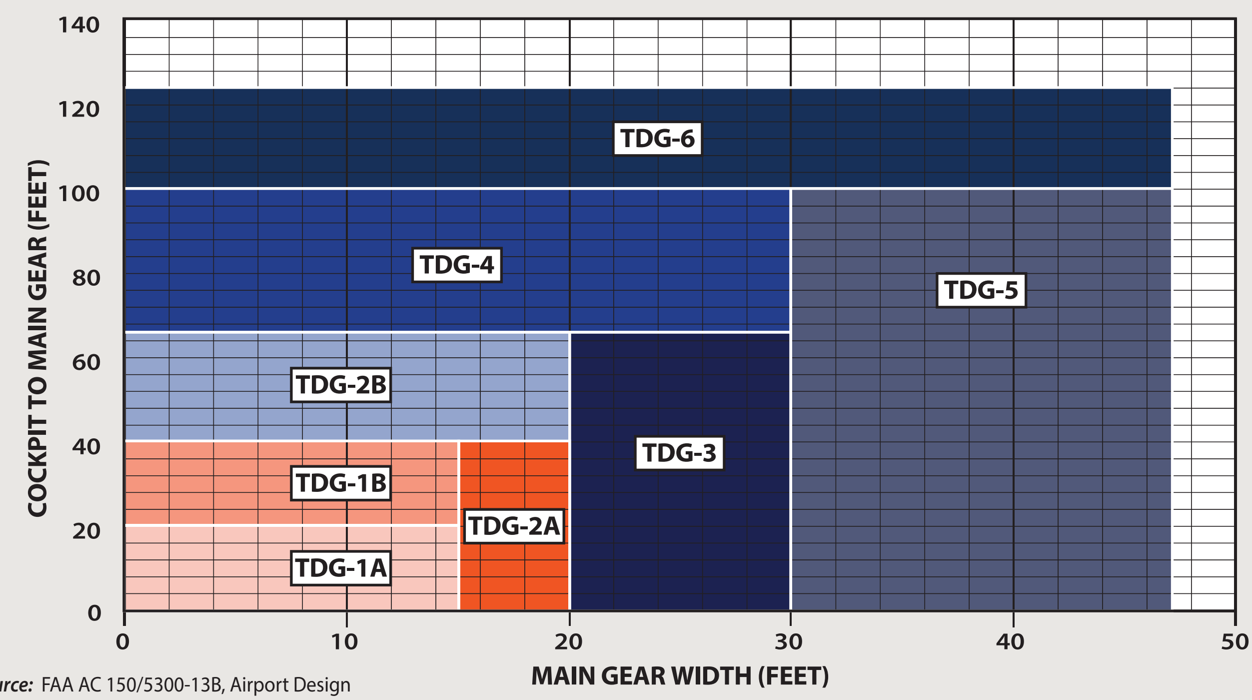
Group #	Tail Height (feet)	Wingspan (feet)
I	<20	<49
II	20-<30	49-<79
III	30-<45	79-<118
IV	45-<60	118-<171
V	60-<66	171-<214
VI	66-<80	214-<262

VISIBILITY MINIMUMS

RVR* (ft)	Flight Visibility Category (statute miles)
VIS	3-mile or greater visibility minimums
5,000	Not lower than 1-mile
4,000	Lower than 1-mile but not lower than ¾-mile
2,400	Lower than ¾-mile but not lower than ½-mile
1,600	Lower than ½-mile but not lower than ¼-mile
1,200	Lower than ¼-mile

***RVR**: Runway Visual Range

TAXIWAY DESIGN GROUP (TDG)



Source: FAA AC 150/5300-13B, Airport Design

Exhibit 2F
AIRCRAFT CLASSIFICATION PARAMETERS

The AAC generally refers to the approach speed of an aircraft in landing configuration. The higher the approach speed, the more restrictive the applicable design standards will be. The AAC is depicted by a letter (A through E) and relates to aircraft approach speed (operational characteristic). The AAC generally applies to runways and runway-related facilities, such as runway width, runway safety area (RSA), runway object free area (ROFA), runway protection zone (RPZ), and separation standards.

Airplane Design Group (ADG)

The ADG, depicted by a Roman numeral (I through VI), is a classification of aircraft that relates to aircraft wingspan or tail height (physical characteristic). When the aircraft wingspan and tail height fall within different groups, the higher group is used. The ADG influences design standards for taxiway safety area (TSA), taxiway object free (TOFA), taxilane object free area, apron wingtip clearance, and various separation distances.

Taxiway Design Group (TDG)

The TDG is a classification of airplanes based on outer-to-outer main gear width (MGW) and cockpit to main gear (CMG) distance. The TDG relates to the undercarriage dimensions of the design aircraft. The taxiway design elements determined by the application of the TDG include the taxiway width, taxiway edge safety margin, taxiway shoulder width, taxiway fillet dimensions, and (in some cases), the separation distance between parallel taxiways/taxilanes. Other taxiway elements (such as the taxiway safety area (TSA), taxiway/taxilane object free area (TOFA), taxiway/taxilane separation to parallel taxiways/taxilanes or fixed or movable objects, and taxiway/taxilane wingtip clearances) are determined solely based on the wingspan (ADG) of the design aircraft utilizing those surfaces. It is appropriate for taxiways to be planned and built to different TDG standards based on expected use.

Exhibit 2G summarizes the classifications of the most common aircraft in operation today. Generally, recreational and business piston and turboprop aircraft will fall in AAC A and B and ADG I and II. Business jets typically fall in AAC B and C, while the larger commercial aircraft will fall in AAC C and D.

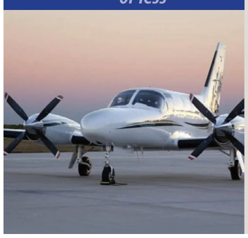
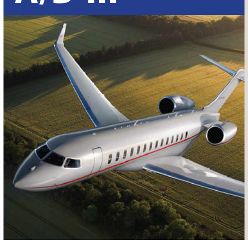
AIRPORT AND RUNWAY CLASSIFICATION

Along with the previously defined aircraft classifications, airport and runway classifications are used to determine the appropriate FAA design standards to which airfield facilities should be designed and built.

Runway Design Code (RDC)

The RDC is a code that signifies the design standards to which the runway should be built. The RDC is based on planned development and has no operational component.

The AAC, ADG, and runway visual range (RVR) are combined to form the RDC of a particular runway. The RDC provides the information needed to determine certain applicable design standards. The first component, depicted by a letter, is the AAC and relates to aircraft approach speed (operational characteristics). The second component, depicted by a Roman numeral, is the ADG and relates to either

A-I	Aircraft	TDG
	• Beech Bonanza • **Cessna 150**, 172 • Piper Comanche, Seneca	1A **1A** 1A
B-I 	• Eclipse 500 • Beech Baron 55/58 • **Beech King Air 100** • Cessna 421 • Cessna Citation M2 (525) • Cessna Citation 1 (500) • Embraer Phenom 100	1A 1A **1A** 2A 1A 1A 1A
A/B-II *12,500 lbs. or less* 	• Beech Super King Air 200 • Beech King Air 90 • **Cessna 441 Conquest** • Cessna Citation CJ2 • Pilatus PC-12	2A 1A **1A** 2A 2
B-II *over 12,500 lbs.* 	• Beech Super King Air 350 • Cessna Citation CJ3 (525B) • **Cessna Citation CJ4 (525C)** • Cessna Citation Latitude • Embraer Phenom 300 • Falcon 20 • Pilatus PC-24	2A 2A **1B** 1B 1B 1B 2A
A/B-III 	• Bombardier Dash 8 • **Bombardier Global 7500** • Falcon 7X, 8X	3 **2B** 2A
C/D-I 	• **Lear** 35, 40, **45**, 55, 60XR • F-16	**1B** 1A

C/D-II	Aircraft	TDG
	• Challenger 600/604 • Cessna Citation III, VI,VII, X • Embraer Legacy 135/140 • **Gulfstream IV** (D-II) • Gulfstream G280 • Lear 70, 75 • Falcon 50, 900, 2000 • Hawker 800XP, 4000	1B 1B 2B **2A** 1B 1B 2A 1B
C/D-III *less than 150,000 lbs.* 	• Gulfstream V • Gulfstream 550, 600, 650 • **Global 5000**, 6000	2B **2B** 2B
C/D-III *over 150,000 lbs.* 	• Airbus A319, A320, A321 • **Boeing 737-800**, 900 • MD-83, 88	3 3 4
C/D-IV 	• Airbus A300 • Boeing 757-200 • **Boeing 767**-300, 400 • MD-11	5 4 **5** 6
C/D-V 	• Airbus A330-200, 300 • Airbus A340-500, 600 • Boeing 747-100 - 400 • Boeing 777-300 • **Boeing 787-8**, 9	5 6 5 6 **5**
E-I 	• **F-15**	**1B**

Note: Aircraft pictured is identified in bold type.

Exhibit 2G
AIRCRAFT REFERENCE CODES

the aircraft wingspan or tail height (physical characteristics), whichever is most restrictive. The third component relates to the available instrument approach visibility minimums, which are expressed by RVR values in feet of 1,200 (⅛-mile), 1,600 (¼-mile), 2,400 (½-mile), 4,000 (¾-mile), and 5,000 (1-mile). The RVR values approximate standard visibility minimums for instrument approaches to the runways. The third component is labeled "VIS" for runways designed for visual approach use only.

Approach Reference Code (APRC)

The APRC is a code that signifies the current operational capabilities of a runway and associated parallel taxiway with regard to landing operations. The APRC has the same three components as the RDC: AAC, ADG, and RVR. The APRC describes the current operational capabilities of a runway under particular meteorological conditions in which no special operating procedures are necessary, as opposed to the RDC, which is based on planned development with no operational component. The APRC for a runway is established based on the minimum runway-to-taxiway centerline separation.

Departure Reference Code (DPRC)

The DPRC is a code that signifies the current operational capabilities of a runway and associated parallel taxiway with regard to takeoff operations. The DPRC represents aircraft that can take off from a runway while any aircraft are present on adjacent taxiways, under particular meteorological conditions with no special operating conditions. The DPRC is similar to the APRC but has two components: AAC and ADG. A runway may have more than one DPRC depending on the parallel taxiway separation distance.

Airport Reference Code (ARC)

The ARC is an airport designation that signifies the airport's highest RDC minus the third (visibility) component of the RDC. The ARC is used for planning and design only and does not limit the aircraft that may be able to operate safely at an airport. The current airport layout plan (ALP) for the airport, which will be updated as part of this planning effort, identifies an ARC of C-II as the existing design for Runways 2-20 and 15-33 and an ARC of B-II for Runway 10-28.

CRITICAL AIRCRAFT

The first consideration is the safe operation of aircraft likely to use an airport. Any operation of an aircraft that exceeds an airport's design criteria may result in an unsafe operation or a lower safety margin; however, it is not the usual practice to base an airport's design on an aircraft that infrequently uses the airport.

FAA AC 150/5000-17, *Critical Aircraft and Regular Use Determination*, provides guidance on determining the critical aircraft for the airport and each runway. **The critical aircraft is defined as the most demanding aircraft type, or grouping of aircraft with similar characteristics, that makes regular use of the airport. Regular use is 500 annual operations, excluding touch-and-go operations.** Planning for future aircraft use is of particular importance because the design standards are used to plan separation distances between facilities. These future standards must be considered now to ensure short-term development does not preclude the reasonable long-range potential needs of the airport.

According to FAA AC 150/5300-13B, *Airport Design*, "airport designs based only on existing aircraft can severely limit the ability to expand the airport to meet future requirements for larger, more demanding aircraft. Airport designs that are based on large aircraft never likely to be served by the airport are not economical." Selection of the current and future critical aircraft must be realistic in nature and supported by current data and realistic projections.

AIRPORT CRITICAL AIRCRAFT

The airport experiences frequent activity by commercial passenger aircraft and business jets. Currently, the largest commercial passenger aircraft regularly operating at SAF is the Embraer ERJ175. The FAA maintains the Traffic Flow Management System Counts (TFMSC) database, which documents certain aircraft operations at airports. Information is added to the TFMSC database when pilots file flight plans and/or when flights are detected by the National Airspace System, usually via radar. The database includes documentation of commercial traffic (air carrier and air taxi), general aviation, and military aircraft. Due to factors such as incomplete flight plans, limited radar coverage, and visual flight rules (VFR) operations, TFMSC data do not account for all aircraft activity at an airport by a given aircraft type; therefore, it is likely there are more operations at an airport than are captured by this methodology. The FAA indicates that for turboprops and jets, the capture rate is better than 95 percent because operators of these types of sophisticated aircraft generally file flight plans. TFMSC data for activity at SAF are available and were utilized in this analysis.

Table 2LL presents historical TFMSC annual activity data for 2015 and 2025. Aircraft in AAC C, which includes the CRJ700 and ERJ175, accounted for 9,477 operations in 2025 and have averaged 7,368 over the last 10 years. AAC D operations totaled only 189 in 2025, well below the 500 operations threshold; therefore, operations by aircraft in the C category account for the largest share of aircraft operations based on AAC for 2025 and over the last 10 years, so the existing critical AAC for the airport is identified as AAC C.

Aircraft in ADG II, which includes the CRJ700, accounted for over 13,600 operations in 2025, while aircraft in ADG III accounted for 1,603 operations. Most of the ADG III operations are by commercial passenger service aircraft, particularly the Embraer ERJ175, which accounted for 1,490 operations; therefore, the first two elements of the existing critical aircraft classification are C-III. **The existing critical aircraft for SAF is the Embraer ERJ175.**

Future Critical Aircraft

Section 2.3 of FAA AC 150/5000-17 outlines a specific approach to projecting a future critical aircraft. According to the AC:

> *"The forecast, as submitted to FAA by the airport sponsor, must include a projection of the number of operations by the future critical aircraft for the planning horizon year (i.e., typically not more than 20 years from the base year). Proper diligence and awareness of aircraft fleet trends is needed when establishing the future critical aircraft, particularly in cases where the future RDC may change due to an aircraft type with greater requirements (i.e., runway or airfield geometry).*

Caution is warranted when a change in the critical aircraft is identified in the long-term forecast (years 11-20) given the uncertainty inherent to this forecast range. The long-term change to the critical aircraft must be supported by a reasonable forecast."

An airline operational fleet mix was previously presented in **Table 2U**. To meet the requirements for determining a future critical aircraft, a projection of operations by ARC (ADG and AAC) was developed. **Table 2LL** shows projections for AACs B, C, and D and ADGs I, II, and III. AAC A is excluded because it is primarily comprised of small aircraft that typically do not factor into the critical aircraft determination.

TABLE 2LL | Fleet Mix Forecast by Aircraft Reference Code

Design Category	Historical Operations			Forecasted Operations			
	2015	2025	2015–2025 CAGR	2030	2035	2045	2025–2045 CAGR
AAC B	6,600	7,127	0.8%	7,400	7,700	8,300	0.8%
AAC C	5,489	9,477	5.6%	10,600	12,000	15,000	2.3%
AAC D	1,215	189	-17.0%	275	400	850	7.8%
ADG I	5,067	3,534	-3.5%	3,250	3,000	2,500	-1.7%
ADG II	10,639	13,661	2.5%	15,550	17,700	23,000	2.6%
ADG III	125	1,603	29.1%	3,000	7,000	11,000	10.1%

AAC = aircraft approach category
ADG = airplane design group
AAC A operations are excluded because smaller/slower aircraft are unlikely to impact the critical design aircraft.

Determining the future critical aircraft can be challenging because fleet mixes change over time. Based on the previously presented forecasts and the information provided, SAF is expected to begin garnering more consistent service by larger commercial aircraft, including the Airbus A319 in the short term and eventually the A320 or Boeing 737. The projections provided in **Table 2LL** show aircraft in AAC D and ADG III are expected to account for approximately 850 operations (AAC D) and 11,000 operations (ADG III) by 2045. These operational levels would satisfy the criteria set forth in AC 150/5000-17, *Critical Aircraft and Regular Use Determination*; therefore, **the future critical aircraft is D-III**, with the Airbus A320/Boeing 737 as the representative aircraft.

TAXIWAY DESIGN GROUP (TDG)

The TFMSC also provides a breakdown of aircraft operations by TDG. According to SAF operations data (presented in **Table 2MM**), the highest TDG that exceeded the threshold of 500 annual operations in 2025 is TDG 3, which is represented by the Embraer ERJ175; as such, TDG 3 is considered the existing TDG critical design aircraft for taxiway planning purposes. Because the ultimate critical aircraft has been identified as the Airbus A320 or Boeing 737, which are both TDG 3 aircraft, the ultimate TDG critical design aircraft for taxiway planning purposes will remain TDG 3 through the planning period.

TABLE 2MM | SAF Operations by Taxiway Design Group (TDG)

TDG	2020	2021	2022	2023	2024	2025	CAGR
1A	1,490	2,291	2,432	2,082	2,204	2,114	7.2%
1B	3,181	5,464	5,110	4,725	5,172	4,998	9.5%
2A	2,081	3,426	3,269	2,822	2,649	2,477	3.5%
2B	3,176	4,305	5,234	5,568	6,605	5,954	13.4%
3	7	5	20	366	412	1,250	182.1%

Source: FAA TFMSC

RUNWAY DESIGN CODE (RDC)

Each runway is assigned an RDC, which relates to specific FAA design standards that should be met in relation to each runway. The RDC takes into consideration the AAC, ADG, and RVR. In most cases, the critical aircraft will also be the RDC for the primary runway.

Current RDC

Runways 2-20 and 15-33 are both classified as air carrier runways within SAF's airport certification manual. As such, both runways should be designed to accommodate the current and future critical aircraft. Runway 2-20 is 8,366 feet long and 150 feet wide and has instrument approaches that provide visibility minimums as low as ¾ mile. Runway 15-33 is 6,316 feet long and 100 feet wide and also has instrument approach minimums down to ¾ mile; therefore, **the RDC for Runway 2-20 and 15-33 is C-III-4000**.

Runway 10-28 is 6,301 feet long and 75 feet wide. This runway is used primarily by general aviation aircraft and has instrument approach minimums down to one mile. The runway is currently designed to B-II standards, which accommodate the bulk of the general aviation fleet; therefore, **the current RDC for Runway 10-28 is B-II-5000**.

Future RDC

The applicable RDC for each runway can change over time; thus, the applicable design standards can also change. Runway 2-20 and Runway 15-33 both accommodate commercial service aircraft and account for over 93 percent of operations at the airport. Operations in RDC D-III are forecasted to increase over time, so both runways should be classified as D-III; therefore, **Runway 2-20 and Runway 15-33 should both be classified as D-III-4000 in the future**.

Runway 10-28 is projected to continue being utilized primarily by GA aircraft, so no change in the RDC for Runway 10-28 is projected; therefore, **the future RDC for Runway 10-28 is planned to remain B-II-5000**.

While the forecast strongly indicates the first two elements of the RDC for Runway 2-20 and Runway 15-33 need to meet D-III, and Runway 10-28 should remain B-II, the third element (the instrument approach visibility minimums) will be reviewed in greater detail in the Facility Requirements chapter.

APPROACH AND DEPARTURE REFERENCE CODES

The approach and departure reference codes (APRC and DPRC) describe the current operational capabilities of each runway and the adjacent parallel taxiways, where no special operating procedures are necessary. Essentially, the APRC and DPRC describe the current conditions at an airport in runway classification terms when considering the parallel taxiway.

Taxiways A and D are 400 feet from Runway 2-20, which has visibility minimums of ¾ mile; therefore, the APRC for Runway 2-20 is D/IV/4000 and D/V/4000. This APRC classification for Runway 2-20 means the existing runway/taxiway system could accommodate regular use by up to D-IV/V aircraft without the need for any physical changes to the runway/taxiway system. Runway 15-33 does not have a true parallel taxiway, so the APRC does not apply to that runway. Taxiway F is 240 feet from the centerline of Runway 10-28 and the instrument approach visibility minimum is one mile; therefore, the APRC for this runway is B/II/4000.

The DPRC is based solely on the runway-to-taxiway separation distance, centerline to centerline. The DPRC for Runway 2-20 is D/IV and D/V. The DPRC for Runway 10-28 is B/II and Runway 15-33 does not have a DPRC.

CRITICAL AIRCRAFT SUMMARY

Table 2NN summarizes the airport and runway classifications for the current and future conditions. Based on current activity levels, the airport is best classified as ARC C-III. In the ultimate condition, the ARC is projected to be D-III. The RDC for Runway 2-20 and Runway 15-33 is currently C-III-4000 and both are expected to change to D-III-4000 in the future. Runway 10-28 is classified as B-II-5000 in the existing and ultimate conditions.

TABLE 2NN | Airport and Runway Classifications

	Current	Ultimate
Airport Reference Code (ARC)	C-III	D-III
Airport Critical Aircraft	C-III-3	D-III-3
Runway Design Code (RDC)		
Runway 2-20	C-III-4000	D-III-4000
Runway 15-33	C-III-4000	D-III-4000
Runway 10-28	B-II-5000	B-II-5000

Source: FAA AC 150/5300-13B, Airport Design

SUMMARY

This chapter has outlined the various activity levels that might reasonably be anticipated over the planning period, as well as the critical aircraft for the airport. Airline passenger enplanements are forecasted to grow from 204,405 in 2025 to 359,000 by 2045, an annual growth rate of 2.91 percent. Total operations are forecasted to grow at an annual rate of 2.44 percent. Based aircraft are forecasted to grow from 179 (currently) to 213 in the long term at an annual growth rate of 0.87 percent.

The critical aircraft for the airport was determined by examining the FAA TFMSC database of flight plans to and from the airport. Based on 2025 data, the current critical aircraft is described as C-III-3, represented by the Embraer ERJ175. The critical aircraft classification is planned to be increased to D-III-3 through the 20-year planning period, with the Airbus A320 and Boeing 737 serving as representative aircraft.

The next step in the planning process is to assess the capabilities of the existing facilities to determine what improvements may be necessary to meet future demands. The range of forecasts developed here will be carried forward in the next chapter as planning horizon activity levels that will serve as milestones or activity benchmarks in evaluating facility requirements.