



Aviation Investment Plan

2050 TPP Technical Working Group

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Introduction

- Aviation System Plan – unique system plan
 - Outlined in state statute – not federally required
 - First included in 2030 TPP
- Met Council role in aviation planning
 - Produce Aviation System Plan
 - Review airport long term comprehensive plans and capital improvement plans and ensure compatibility
- Airport sponsors role (MAC, municipal governments)
 - Capital projects, operations, airport planning
- Limited plan update to meet TPP schedule
 - More extensive update to be done with consultant in 2024
 - Amended into TPP when complete in 2025



Aviation Chapter Outline

- **Aviation Policies and Actions**
 - Separate policies and actions from other modes
- **Existing Conditions**
 - Aviation activity data
 - Ground connections to system facilities
 - Roles of Regional Actors
 - FAA
 - MnDOT Aeronautics
 - Met Council
 - Airport operators (MAC, Municipalities)
- **Airport Classifications and System Role**
- **Emerging Trends**
- **Aviation Planning Process**
 - Long term comprehensive plans
 - Environmental compatibility
 - Non-airport aviation
- **Airspace and Airport Compatibility**
- **Airport Capacity**
- **2050 Aviation Activity Forecasts**
- **Aviation Investment**
 - Funding sources
 - Planned investments
- **Individual Airport Overviews**

Aviation System Background (1)

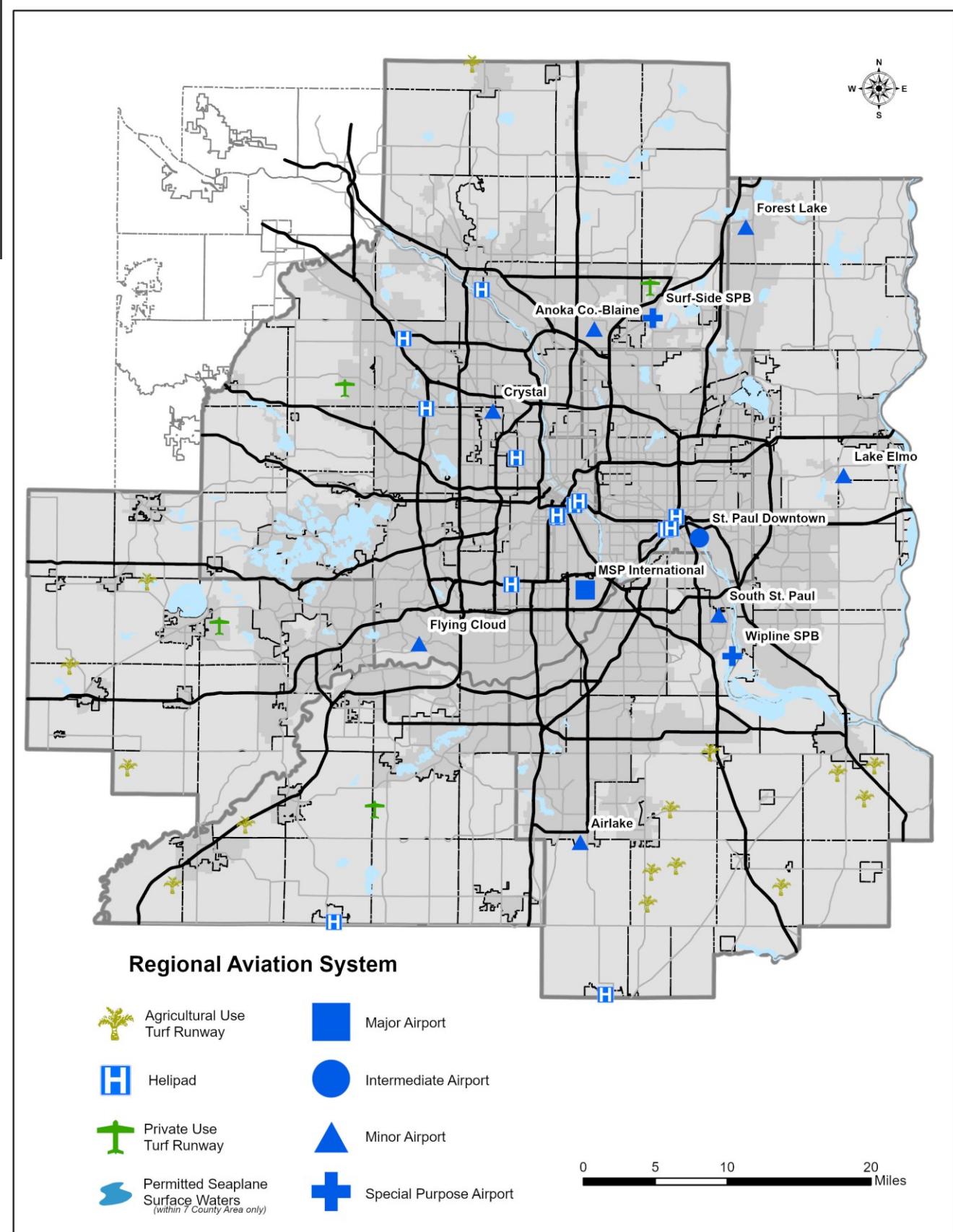
Regional System - Mature system with no major changes

The aviation system in the region is built out, major changes are not expected – maintaining and improving existing facilities

- 9 regional airports
 - 6 are relievers to MSP
 - 2 are municipal owned regional airports
- All facilities projected to be able to meet forecast demand

COVID pandemic caused major delays to Long Term Comprehensive Plans

- MSP – 2024
- Flying Cloud – 2024
- St Paul - 2025
- Anoka-Blaine - 2026

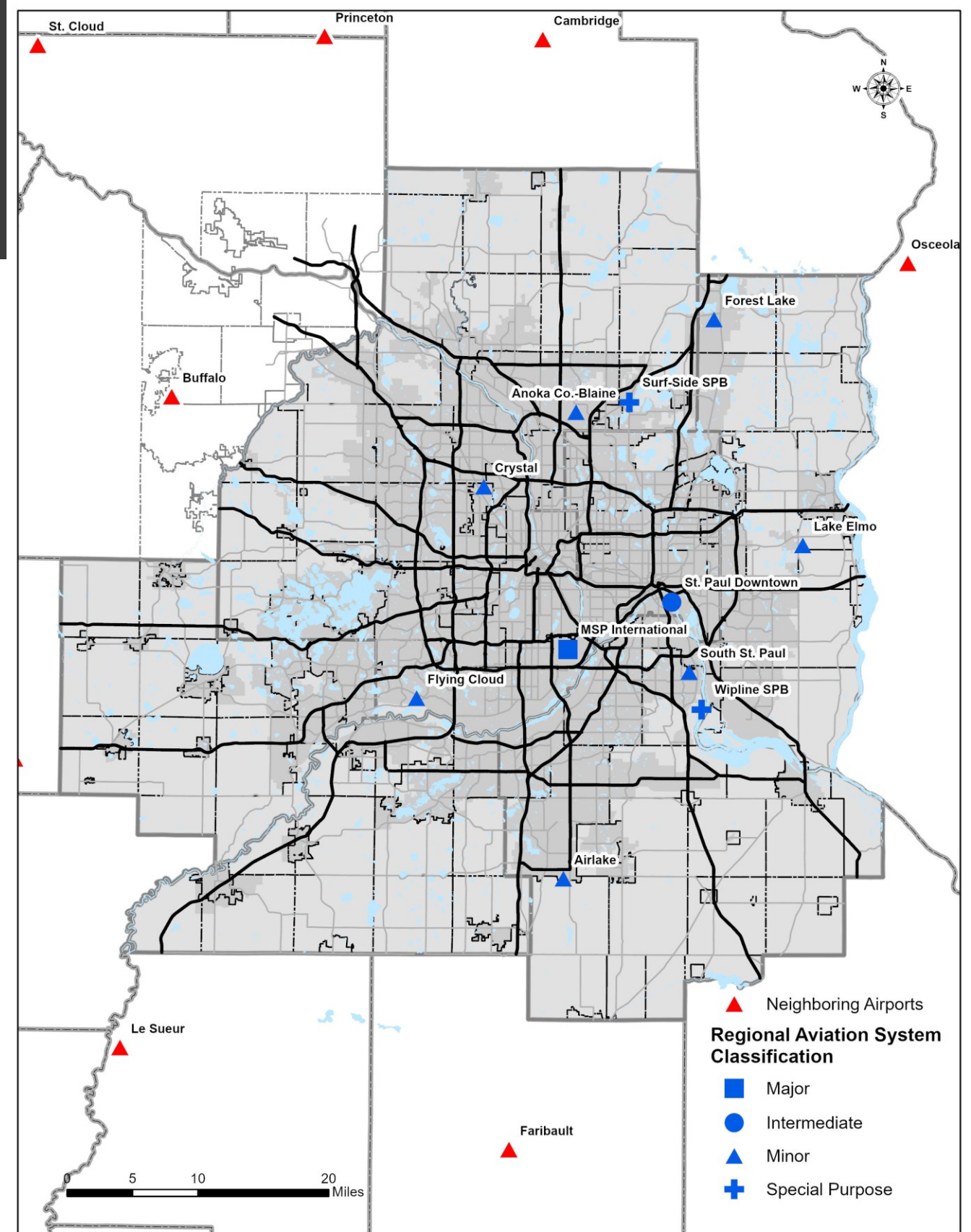


Aviation System Background (2)

Regional System – airport classifications

The aviation system has three distinct classification types

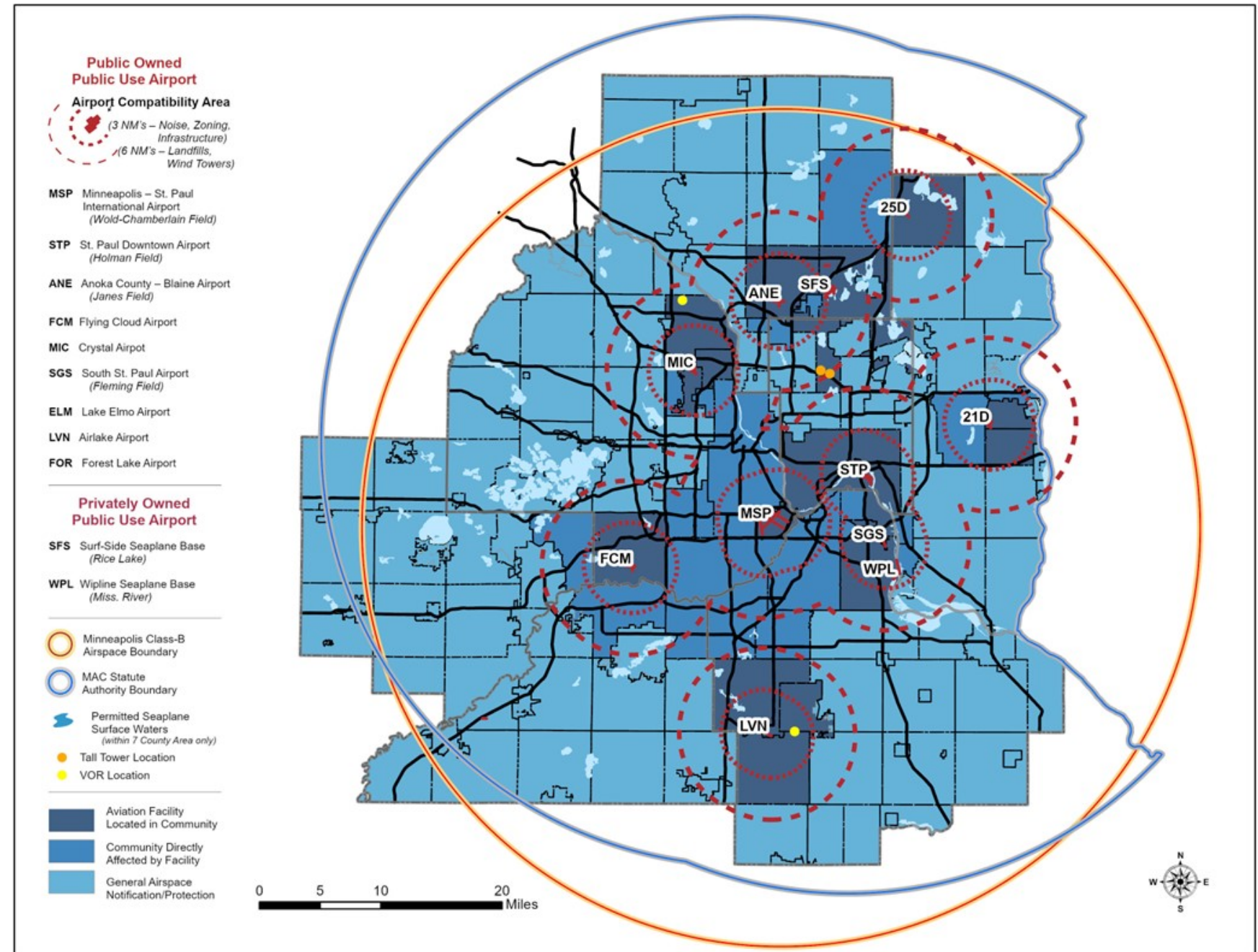
- FAA: National Plan of Integrated Airport Systems (NPIAS)
 - All included but Forest Lake
- State: Updated classifications in recent State Aviation Plan
- Regional:
 - Major – MSP
 - Intermediate – St Paul
 - Minor – All other relievers
 - Special Purpose: Privately owned but accessible to the public



Aviation System Background (3)

Airspace and Airport Compatibility Areas

- Certain restrictions near airports are required to ensure safe aviation activity
- Airports also impact surrounding communities
- Compatibility areas used to determine surrounding community impacts
 - Aircraft noise
 - Land use restrictions



Aviation System Background (4)

Regional System – Flight Activity Rebounding from Pandemic

MSP is nearing passenger levels of 2019, operations still down

- Operations at MSP will continue to trail enplanements as regional aviation flies less operations with larger planes
- Changes in travel needs will drive projects at MSP through 2040
- Passenger growth expected to outpace operations growth
- General aviation numbers continue to grow after years of declines
 - General aviation traffic at relievers hit lowest point in 2020 from a peak in 1998 – COVID brought a rebound in users and traffic to relievers.
 - GA activity is forecasted to continue modest growth through 2050

Activity	2017	2018	2019	2020	2021
Total GA Operations	378,395	374,949	362,835	369,862	389,620
Total MSP Operations	415,406	409,982	404,644	279,768	288,979
Total MSP Enplanements	18,335,669	18,407,440	18,906,393	10,167,985	10,264,753
Total MSP Cargo (metric tons)	206,935	229,419	239,544	203,697	

MSP Forecast Enplanements	2020	2025	2030	2035	2040	2050
Original (2040 LTCP)	20,000,000	22,500,000	24,400,000	26,300,000	28,100,000	32,300,000
Revised	7,400,000	21,600,000	24,100,000	26,100,000	28,100,000	32,300,000
Revised (Aggressive Recovery)	7,400,000	22,300,000	24,100,000	26,100,000	28,100,000	32,300,000

MSP Forecast Operations	2020	2025	2030	2035	2040	2050
Original	411,300	433,000	462,400	490,600	517,200	597,800
Revised	245,900	409,800	450,100	479,600	509,800	597,800

Reliever Forecast Activity	2020	2025	2030	2035	2040	2050
Total G.A. Based Aircraft	1,320	1,437	1,505	1,522	1,549	1,580
Total G.A. Operations	376,524	411,725	418,124	427,707	437,957	450,421

Aviation System Background (5)

Emerging Issues and Trends

COVID-19

- Pandemic effects still lingering

Labor Shortages

- Pandemic restructuring and other issues affecting pilot, ATC and general staff availability

Sustainable Aviation

- Delta Airlines looking to establish sustainable aviation fuel hubs (potentially in MN)

Unmanned Aircraft Systems/Advanced Air Mobility

- New mobility technologies being studied by FAA and others for near term implementation



Aviation System Background (6)

Aviation Planning Process

Aviation Plan

- First plans standalone – now chapter of TPP
- System statements: Compiled after TPP adoption, informs local communities

Long Term Comprehensive Plans

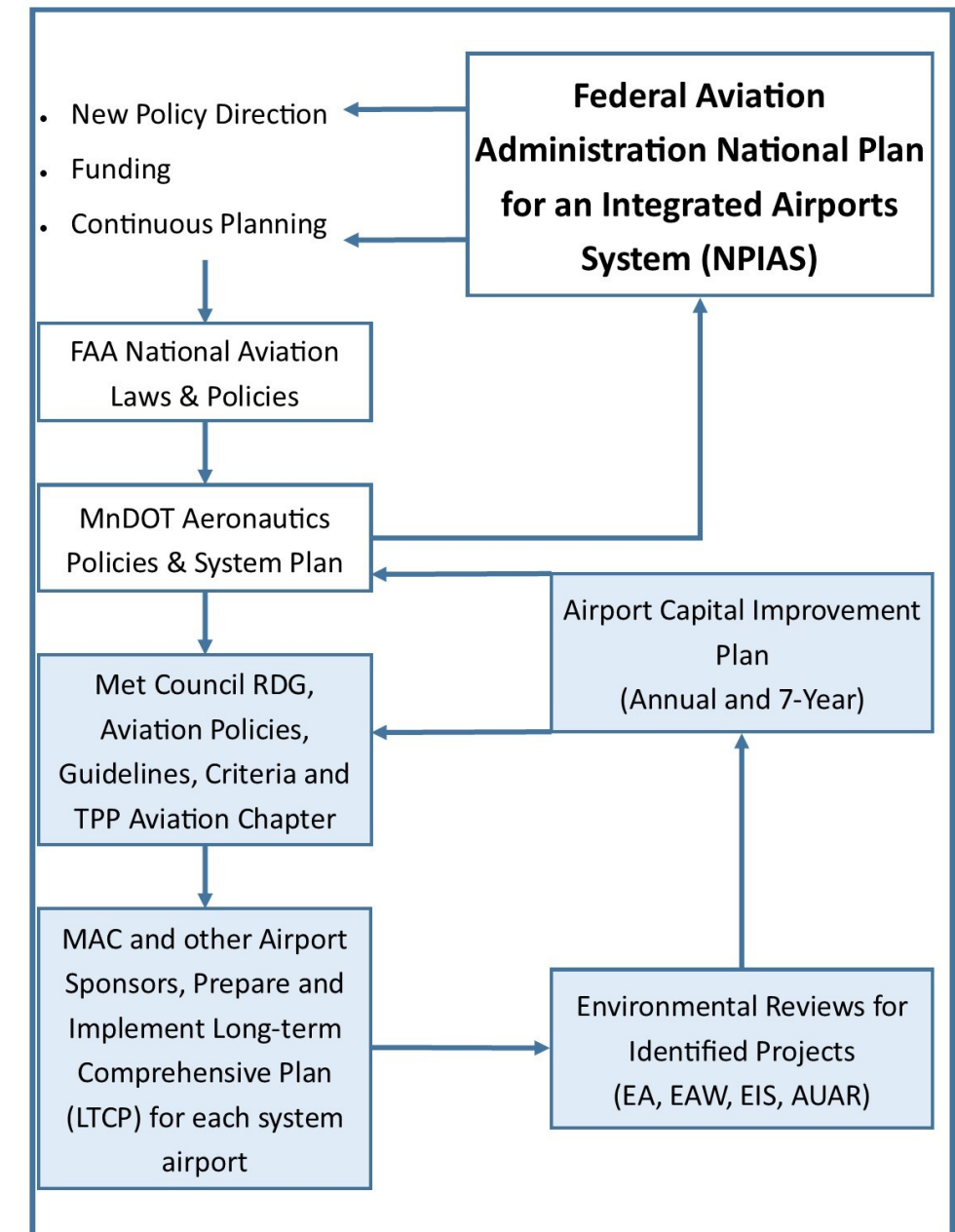
Environmental Compatibility

- Noise/land use/safety
- Natural environment impacts

MAC Capital Improvement Plan

Federal Compliance

- Federal government (FAA) much more involved with aviation planning than other modes



Aviation Plan Policies and Actions

Aviation Plan will have separate Policies and Actions

Major difference between aviation and surface transportation

- Will not find aviation policies intertwined with other modal categories as was done for 2040 TPP
- Policies and actions reworked for new format
- Brought existing policies over from previous TPP
 - Will work with consultant to establish policy and action planning process in 2024

Aviation Plan and Investment Direction (1)

Key Changes since Previous Plan

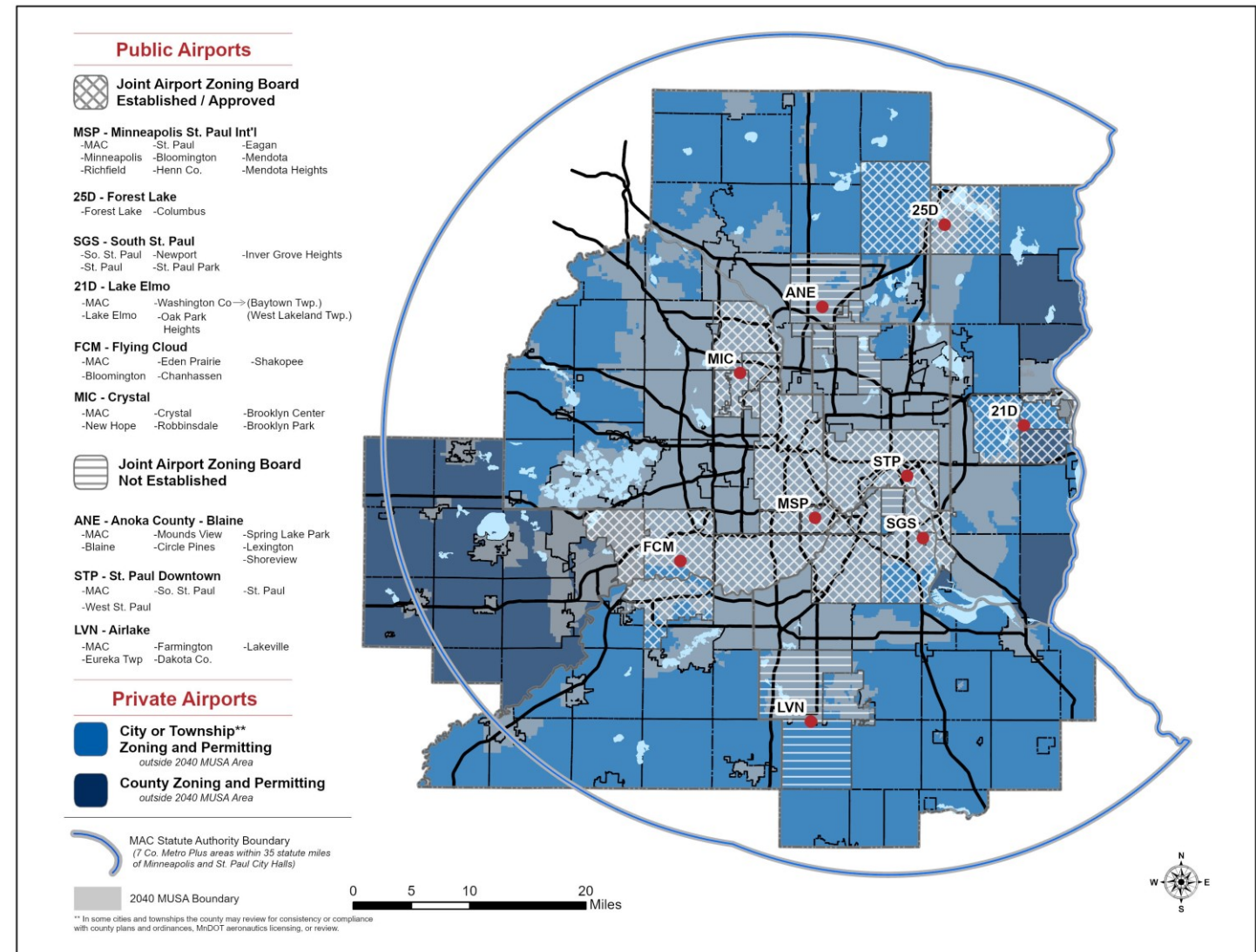
Initial update will be limited in scope to key data updates

Progress made from previous plan

- Joint Area Zoning Boards/Airport Zoning established
 - Lake Elmo
 - Crystal (update)
 - Flying Cloud

Long Term Comprehensive Plans

- MSP International (in progress – draft incorporated) – 2024
- Flying Cloud (in progress) - 2024
- St Paul Downtown – 2025
- Anoka County-Blaine – 2026



Aviation Plan and Investment Direction (2)

Airport Development Funding Sources

Aviation funding very different than other modes – heavily supported by FAA and direct user fees

Federal:

- Airport Improvement Program

State:

- Airport Development Grant Program
- Airport Maintenance and Operation Program
- Hanger Loan Revolving Account Program

Local:

- Municipal
- Private
- MAC
 - User fees (passenger facility charge, parking fees, hanger leasing, etc.)

Aviation Plan and Investment Direction (3)

Planned Airport Investments

- After a slowdown of projects due to the pandemic, airport investments are anticipated to increase over the planning period to meet increasing demand.
- MSP: Will see elevated levels of investment focusing on expanding Terminal 2 and modernizing Terminal 1
 - Integrated 2040 LTCP
- Relievers: Generally, reliever activity is focused on smaller updates, maintenance and hanger development
 - Future LTCPs will inform further discussion and be amended into Plan



*Rendering of Terminal 2 expansion set to begin construction in 2024

Airport	2024-2030	2031-2035	2036-2040	2041-2050
MSP	\$3,973,503,900	\$1,400,500,250	\$2,225,500,150	~\$200-\$300 M annually

Airport	2024-2030	2031-2050
Saint Paul Downtown	\$40,900,000	Funding needs to be understood once LTCP completed
Anoka County-Blaine	\$20,450,000	Funding needs to be understood once LTCP completed
Flying Cloud	\$16,600,000	Funding needs to be understood once LTCP completed
Crystal	\$11,500,000	Approx. \$700,000
Lake Elmo	\$12,600,000	Approx \$4,000,000
Airlake	\$19,450,000	Approx. \$3,500,000
South Saint Paul	\$1,900,000	Funding needs to be understood once LTCP completed
Forest Lake	\$2,432,000	Approx. \$6,300,000

Thank you!

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