

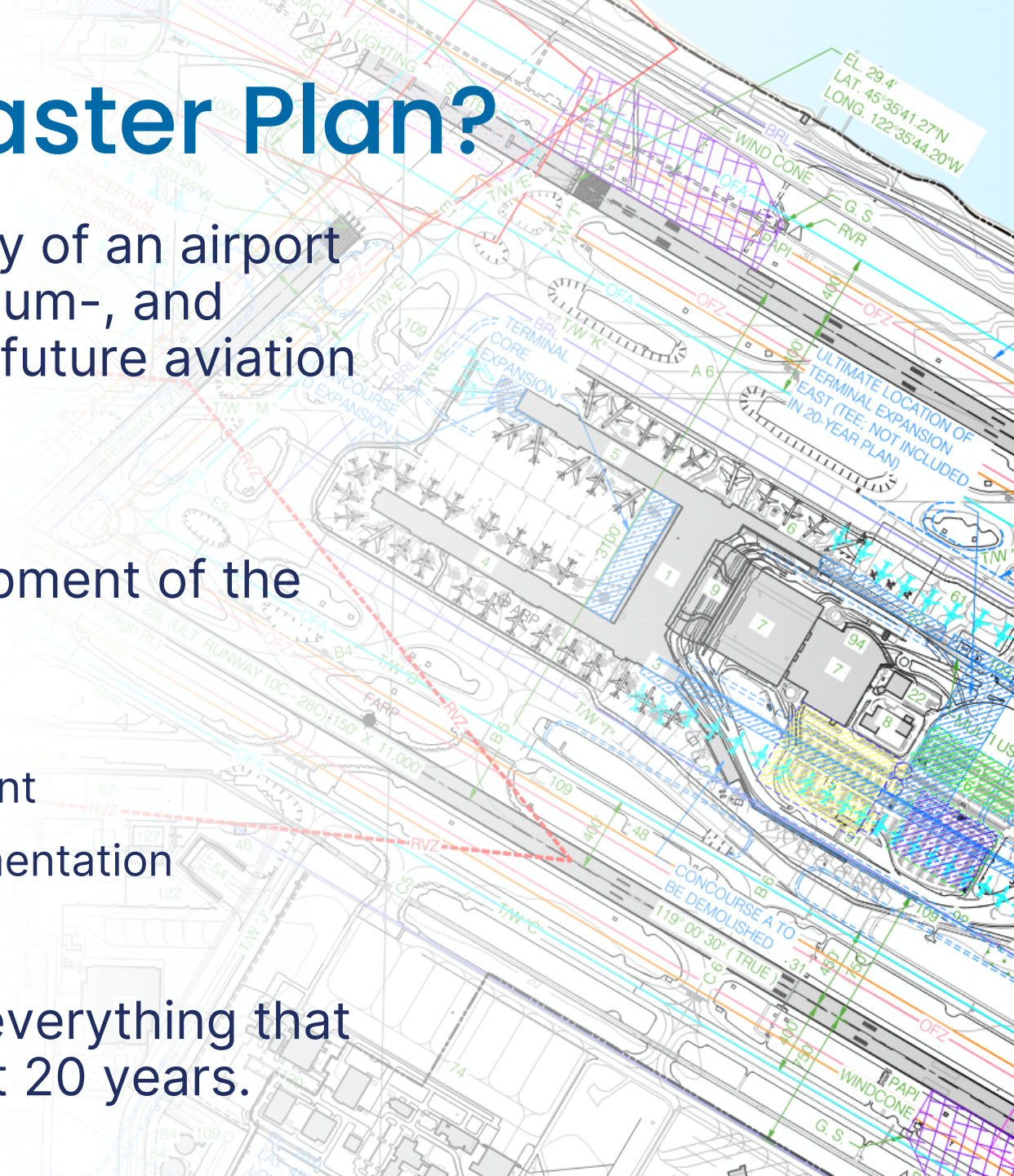
# PDX 2045 Master Plan Update

Portland Freight Advisory Committee

May 1, 2025

# What's an Airport Master Plan?

- **FAA definition:** A comprehensive study of an airport that usually describes the short-, medium-, and long-term development plans to meet future aviation demand.
- **Port definition:** A tool to guide development of the airport over the next 20 years.
  - Evaluates needs, priorities, and alternatives
  - Examines triggers and timing for development
  - Sets the stage for future studies and implementation
- **What it's not:** A specific blueprint for everything that will happen at the airport over the next 20 years.



# Project focus areas



## **Renew or Replace**

Invest in existing facilities to prolong useful life or develop new flexible facilities that consolidate functions.



## **Aircraft Gates**

Determine the appropriate number of international and domestic gates needed to accommodate future demand.



## **Passenger & Baggage Facilities**

Assess level of service and optimize terminal capacity.



## **Federal Facilities**

Expand international facilities to accommodate anticipated demand and improve the passenger experience.



## **Landside Capacity**

Explore multi-modal options to manage vehicular traffic and relieve congested roadway systems.



## **Customer Experience**

Maintain the “best-in-class” reputation of PDX. Enhance services and offerings for customers.



## **Airfield Optimization**

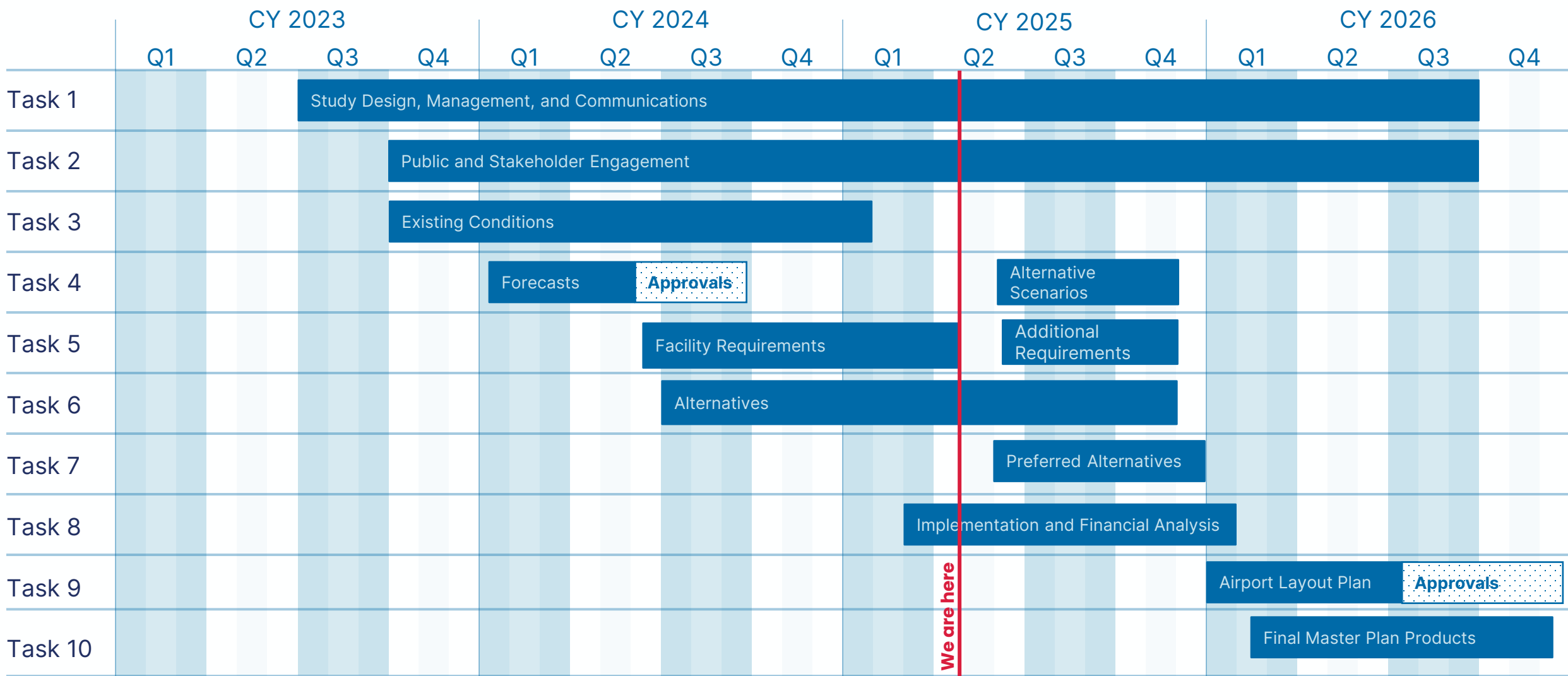
Identify and plan for the appropriate runway and taxiway facilities.



## **Support Functions**

Identify opportunities for colocating critical functions and provide facilities for safe and efficient operations.

# Overall project timeline



# Aviation Demand Forecasts

# What activity do we forecast?



## Passengers

- Domestic and International
- Origin and Destination (O&D) and Connecting
- Additional Breakdown As Needed:
  - Airline
  - Terminal
  - Point of Origin



## Operations

- Mainline and Regional Passenger Operations
- Cargo
- Air Taxi
- General Aviation
- Military
- Additional Detail as Needed
  - Fleet mix
  - Itinerant / Local
  - IFR / VFR



## Other Activity and Metrics

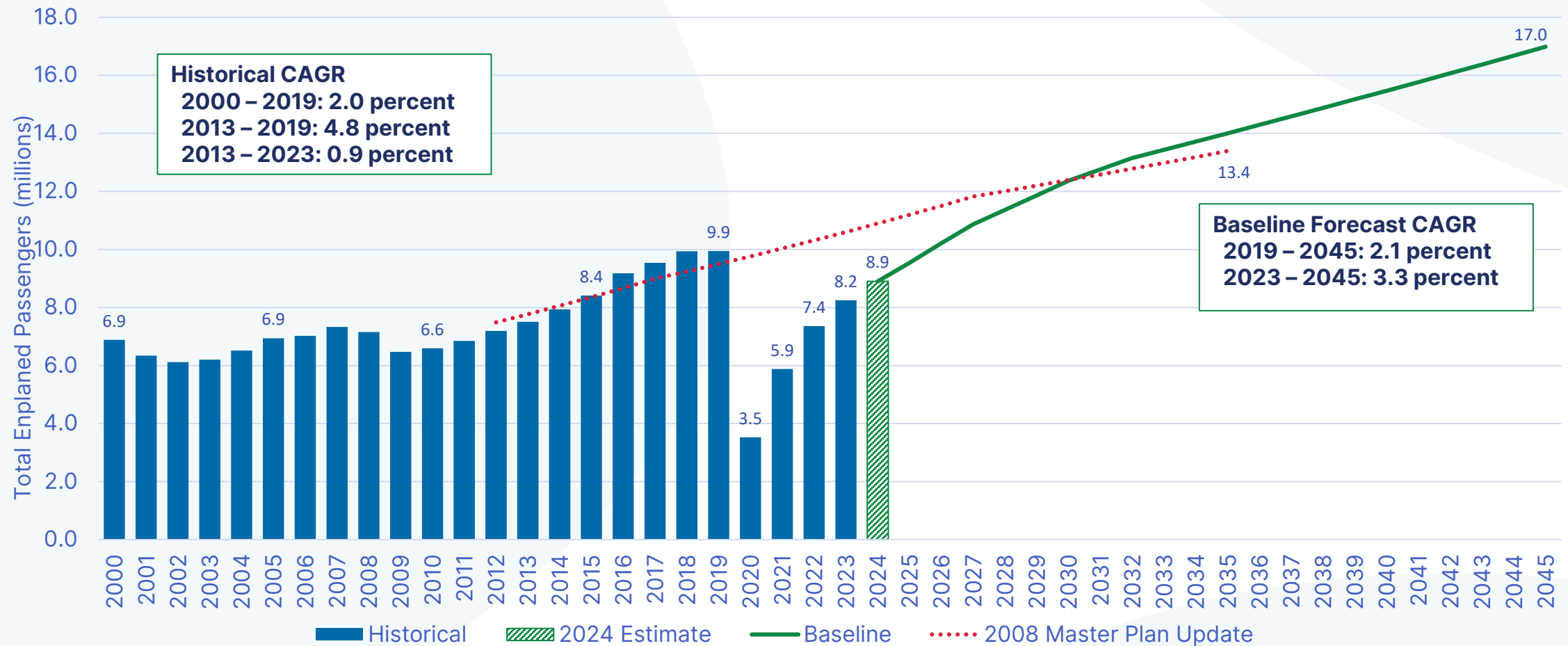
- Cargo Volume
- Landed Weight
- Based Aircraft
- Peaking Characteristics (seasonal, daily and hourly)

# Forecast Headlines

- **Slower but steady COVID Recovery:** 19 MAP in 2026, 21 MAP in 2027.
- **Long-Term Growth Eventually Resumes:** Return to “new normal” annual growth surpassing Airport Futures forecast in 2030.
- **Ample Airfield Capacity:** Operations growth remains below Airport Futures projections through 2045.
- **Today’s Role Persists:** Mainly origin & destination traffic (89%) with about 91% domestic/9% international passenger split.
- **Cargo Growth Remains Volatile:** Fresh look at cargo assumptions resets prior forecasts, projects modest growth.

# Passenger Forecast Summary

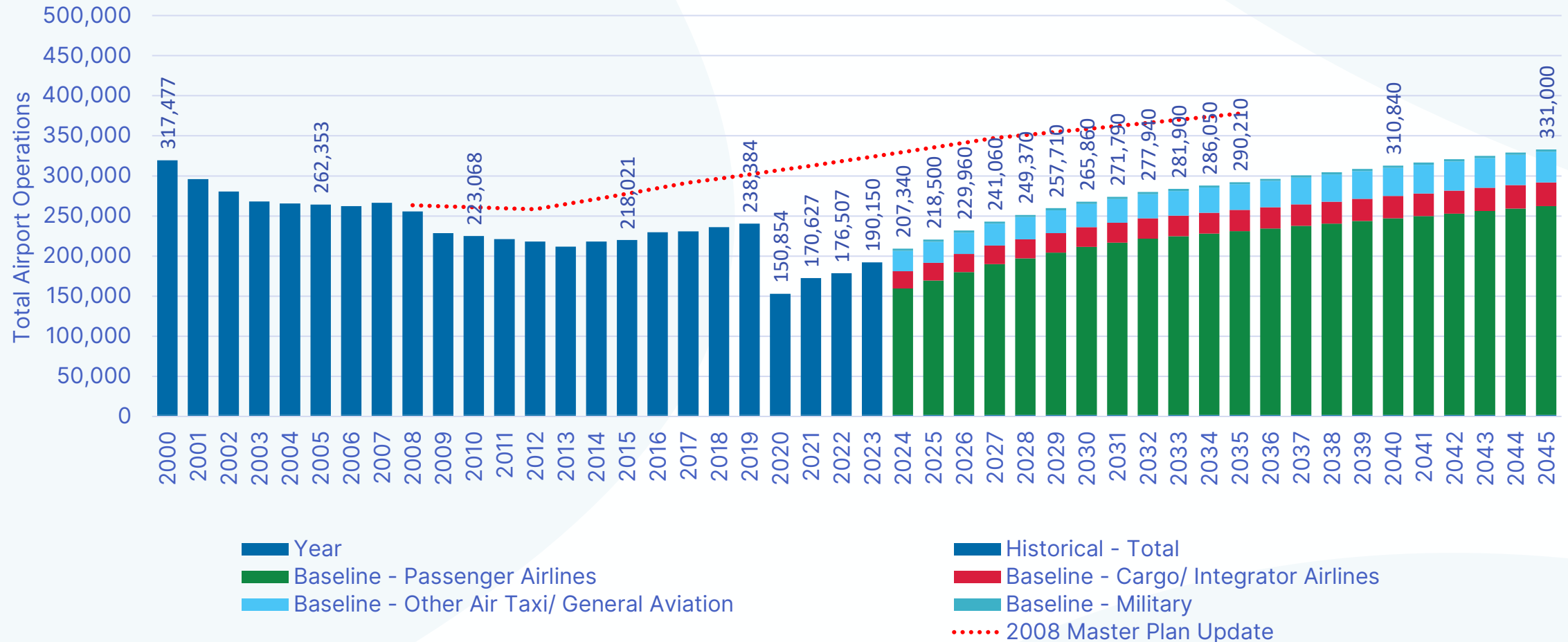
- Enplaned passengers are forecast to increase to 17 million in 2045



Sources: Port of Portland, March 2024; Cirium Diio, April 2024; Jacobs Consultancy, Master Plan Update, technical Memorandum No. 2 – Aviation Demand Forecast, September 2008; Ricondo & Associates, Inc., April 2024.

# Operations Forecast Summary

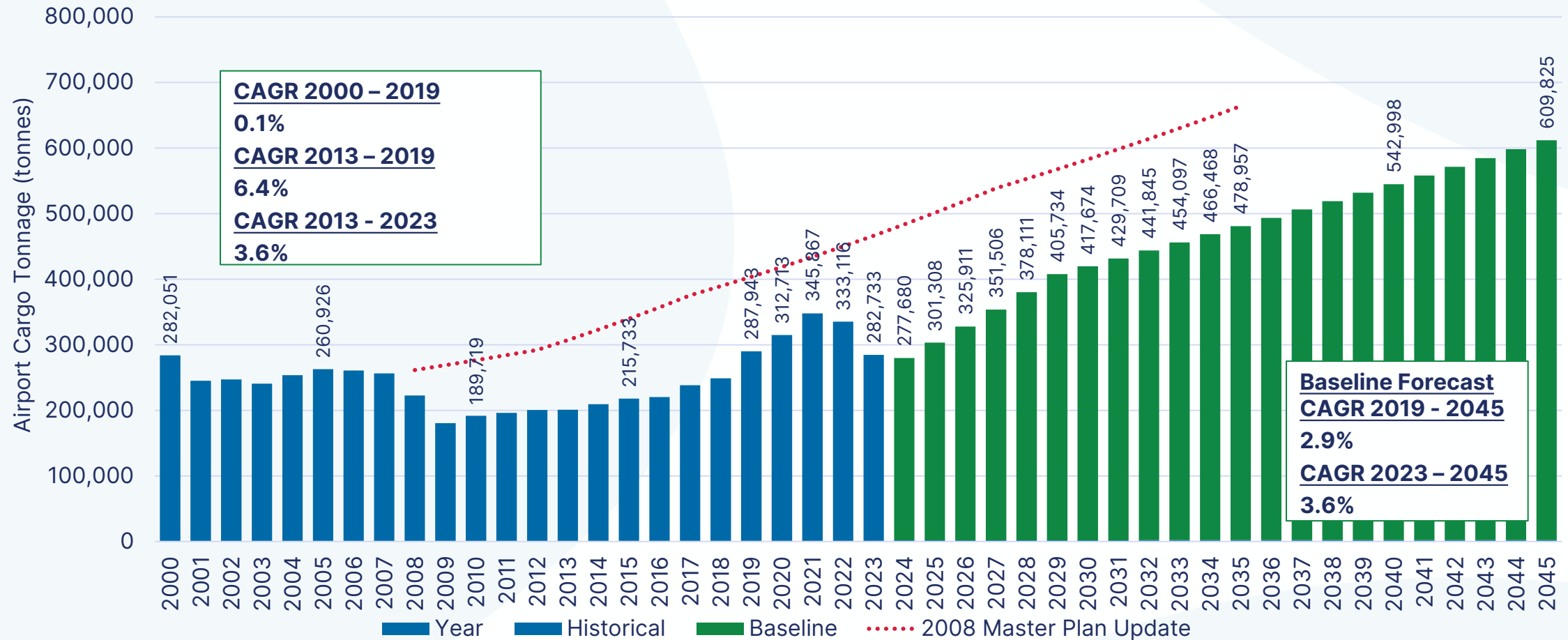
- Total airport operations are forecast to 331,000 operations in 2045



Sources: : Port of Portland, March 2024; Federal Aviation Operations Network, *Air Traffic Activity Data System and Traffic Flow Management System Counts*, March 2024; Jacobs Consultancy, Master Plan Update, technical Memorandum No. 2 – Aviation Demand Forecast, September 2008; Ricondo & Associates, Inc., April 2024.

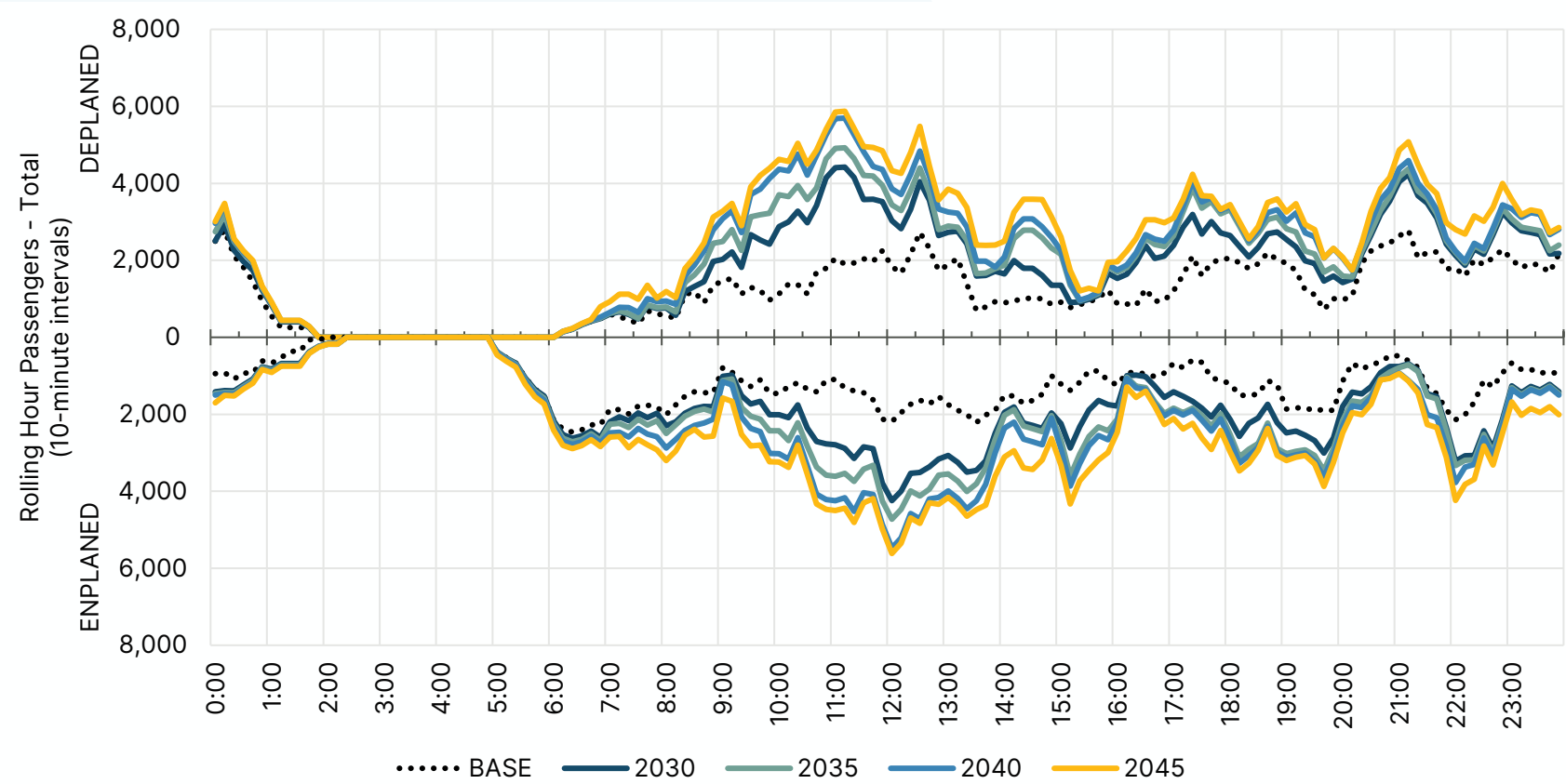
# Cargo Forecast Summary

- Cargo tonnage is forecast to approximately 610,000 metric tonnes in 2045



Sources: Port of Portland, March 2024; Boeing World Air Cargo Forecast 2022 – 2041 & Commercial Market Outlook 2023 - 2042; Jacobs Consultancy, Master Plan Update, technical Memorandum No. 2 – Aviation Demand Forecast, September 2008;Ricondo & Associates, Inc., April 2024.

# Rolling Hour Passengers – Total



DEPLANED PASSENGERS			
YEAR	PEAK HOUR	DDFS	PEAK HOUR %
2023	2,787	27,843	10.0%
2030	4,422	42,431	10.4%
2035	4,924	47,988	10.3%
2040	5,695	53,019	10.7%
2045	5,874	58,140	10.1%

ENPLANED PASSENGERS			
YEAR	PEAK HOUR	DDFS	PEAK HOUR %
2023	2,463	27,428	9.0%
2030	4,243	41,620	10.2%
2035	4,725	47,103	10.0%
2040	5,473	52,007	10.5%
2045	5,616	57,080	9.8%

# Preliminary Facility Requirements

# Airfield Summary

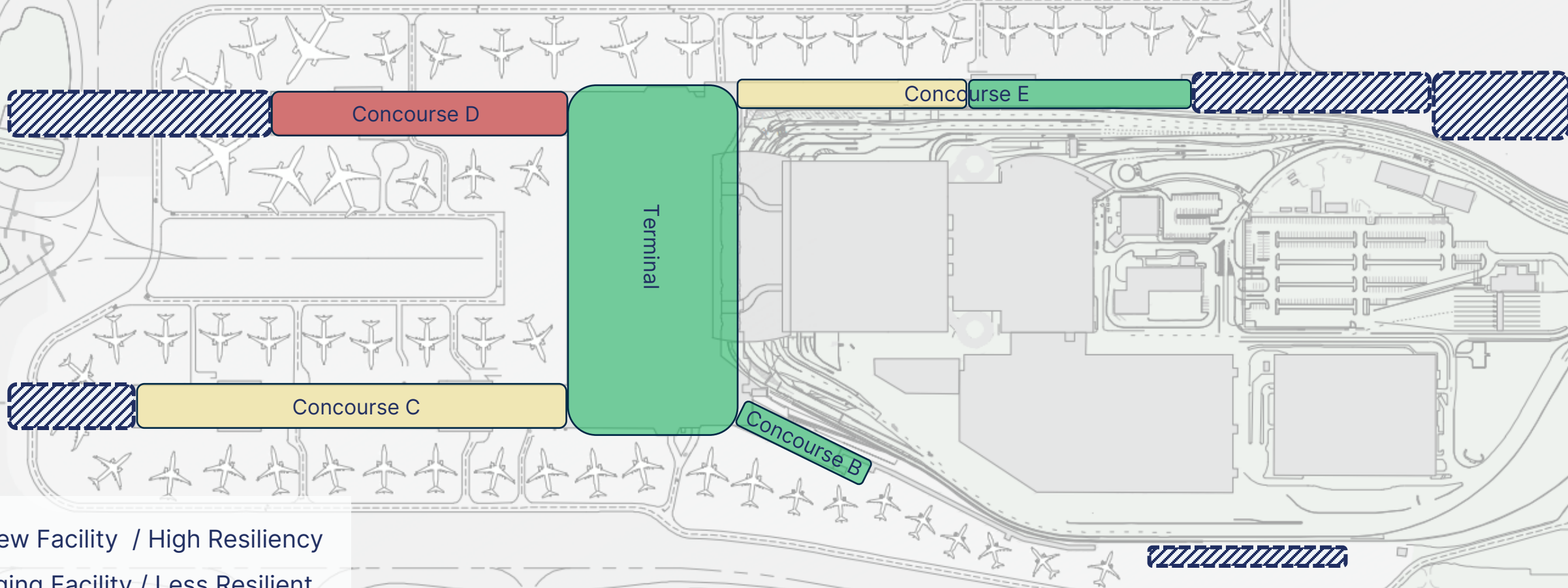
## Conclusions:





- PDX is well positioned regarding airfield/airspace capacity through the planning period (2045)
- PDX 2045 will explore capacity enhancements – specifically exit taxiways
- **Runway 3-21 is not needed for capacity purposes**
- **The third parallel runway is not needed for capacity purposes within the planning period**

## Next steps:

- Identify taxiway capacity enhancements
- Consider opportunities to shorten or remove crosswind runway
- Revisit the location currently reserved for the third parallel runway

# Development Opportunities



-  New Facility / High Resiliency
-  Aging Facility / Less Resilient
-  Old Facility / No Resiliency
-  Area of Opportunity

# (Early) Cargo Facility Requirements

- **Planning for growth:** Forecast identifies cargo CAGR of about 3.6% 2023-2045. In 2045, tonnage is forecast to be roughly double current volumes.
- **...but: Cargo growth is volatile.** Master Plan will identify opportunities for cargo facility expansion, but development is not expected to track demand exactly.
- **New facilities needed to meet 2045 demand:** current facilities generally adequate, but 2045 demand will require about 50% expansion in cargo square footage.
- **Cargo facilities follow airfield and terminal requirements:** Limited options for new facility location; will identify alternatives following terminal and airfield analysis.

# Landside Planning Approach

- **Stay tuned:** Landside alternatives follow development/vetting of airfield, terminal, and cargo facility alternatives.
- **Existing Conditions:** Early identified landside needs include additional public and employee parking, curbside and roadway capacity, and terminal-serving commercial vehicle staging.
- **Facility Requirements & Alternatives Development:** PDX 2045 will identify forecast demand so that we can collaborate with agency partners on long-term capacity solutions.

PDX 2045 will not attempt to design solutions on PBOT/ODOT/WSDOT facilities to meet projected demand. Instead, we will tee up input and collaboration on future projects.

# Stakeholder Engagement

# PDX 2045 Planning Advisory Committee

- 100+ applications received, 25 members selected.
- Successfully recruited a diverse, community-centered and group.
- Collective K/S/E includes folks from various neighborhoods, cultural backgrounds, occupational roles, ages, ways of experiencing.



# PDX 2045 IAC Invited Participant Agencies

- City of Portland
  - Bureau of Environmental Services
  - Bureau of Planning & Sustainability
  - Bureau of Transportation
  - Parks & Recreation
  - Permitting & Development
- City of Vancouver
- Clackamas County
- Clark County
- C-TRAN
- Metro
- Multnomah County
- Oregon Air National Guard
- State of Oregon
  - Department of Aviation
  - Department of Environmental Quality
  - Department of Transportation
- TriMet
- Urban Flood Safety & Water Quality District
- Washington County

# Community Engagement

## Public Open Houses

- March/April:  
Introduction & Forecast
- Early Summer:  
Alternatives
- Early Autumn:  
Preferred Alternative
- Winter:  
Implementation and  
Ongoing Engagement

- Planning Advisory Committee:  
Meeting #7  
May 19, 2025
- Interagency Advisory Committee:  
Next meeting late May
- Project news, events, and  
updates available at  
**[pdx2045.org](https://pdx2045.org)**

# Q&A and Thank You!

For more information: **[pdx2045.org](https://pdx2045.org)**

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