SEA
Seattle-Tacoma International Airport

Air Cargo at SEA

October 10, 2023



Tom Green

Sr. Manager,

Air Cargo Operations &

Development

SEA Seattle-Tacoma International Airport


SEA
Seattle-Tacoma
International
Airport

Upgrade SEA



C Concourse Expansion



International Arrivals Facility



Air Cargo Important to Trade, Aviation & Jobs

Air cargo has a unique role in global trade

- Less than 1% of reported world trade *tonnage* is carried by air cargo
- 35% of reported world trade *value* is carried by air cargo

Air cargo represents an important revenue source for airlines

- Revenue from cargo can make the difference on route profitability
- Revenue from cargo defrays passenger ticket costs

Air Cargo, part of the logistics supply chain, provides employment

- Industry sources estimate each 1,000 metric tons of air cargo generates 10 – 15 jobs systemwide
- For an airport equivalent to SEA that represents 4,560 - 6,840 jobs


cargolux
Cargolux
AIRCRAFT SERVICE INTERNATIONAL GROUP
TIMCO
8/6/2015 6:49:11 AM Cargo 2 Light Pole 03


CHINA
AIRLINES CARGO


B-2077
Northwest Cherries
美国西北樱桃
BOEING 777F


AIR CARGO
대한항공


Prime Air
AAX 0213 AMZ
amazon


FedEx


American


QATAR


Lufthansa

2022 by the Numbers

Air Cargo

-8.5%

Total Air Cargo

2022:	456,289	-8.5%
2021:	498,741	+10.2%
2020:	452,496	- 0.2%
2019:	453,547	

-8.4%

Domestic

2022:	335,516	-8.4%
2021:	366,312	+4.3%
2020:	351,339	14.6%
2019:	306,669	

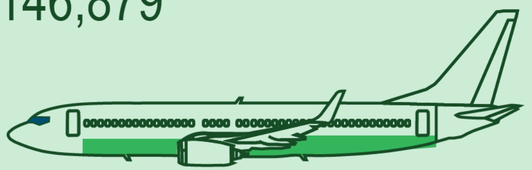
-8.8%

International

2022:	120,777	-8.8%
2021:	132,428	+30.9%
2020:	101,157	-31.1%
2019:	146,879	



Freighter Cargo **-9.5%**



Belly Cargo **-5.9%**

% Year over year

Operations

-6.5%

Cargo Operations

2022:	16,650	-6.5%
2021:	17,814	+5.1%
2020:	16,954	+8.6%
2019:	15,614	

+12.3%

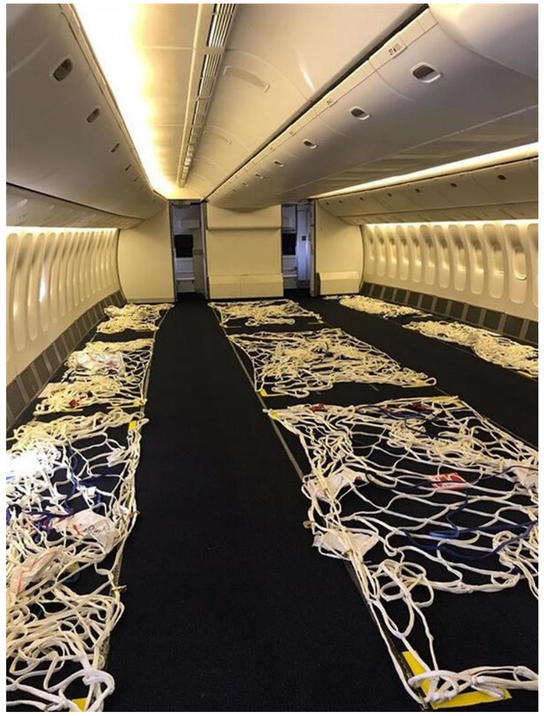
All other aircraft

2022:	395,997	+12.3%
2021:	352,746	+28.4%
2020:	274,728	-36.0%
2019:	428,938	

COVID-19 Impact: Loss of Air Cargo Belly Capacity

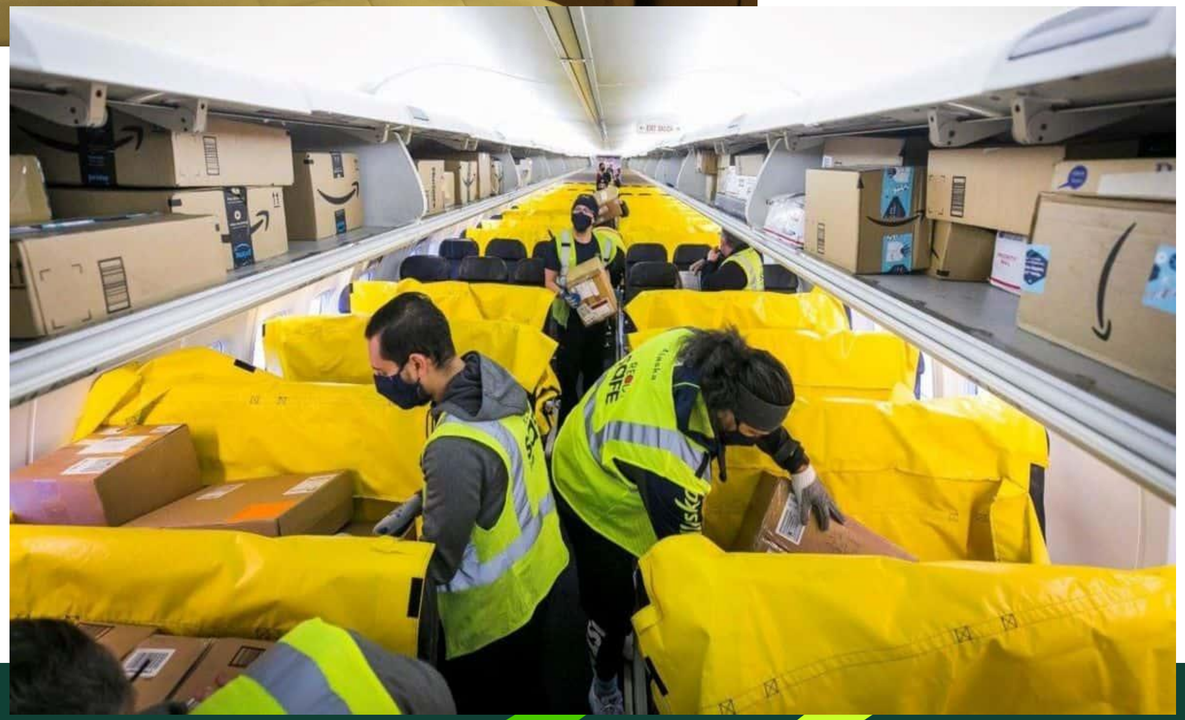
Suspended passenger flights removed significant shipping mode

- Passenger counts dropped precipitously; airlines canceled flights. Belly cargo capacity, a significant portion of the market at SEA, dried up very quickly
- Capacity for international trade by air cargo impacted severely due to outsized role of belly on those trade lanes
- Variable impact across shippers – those who rely on that mode had few if any suitable options
- Some cargo, such as mail, shifted to freighters
- Some airlines operated passenger aircraft flights purely to haul cargo




Product Name
Disposable 3 Layer Mouth/Nose Protection Mask with Ear Loops
11000


FACE MASK
EAR LOOP
FACE MASK
Non Medical



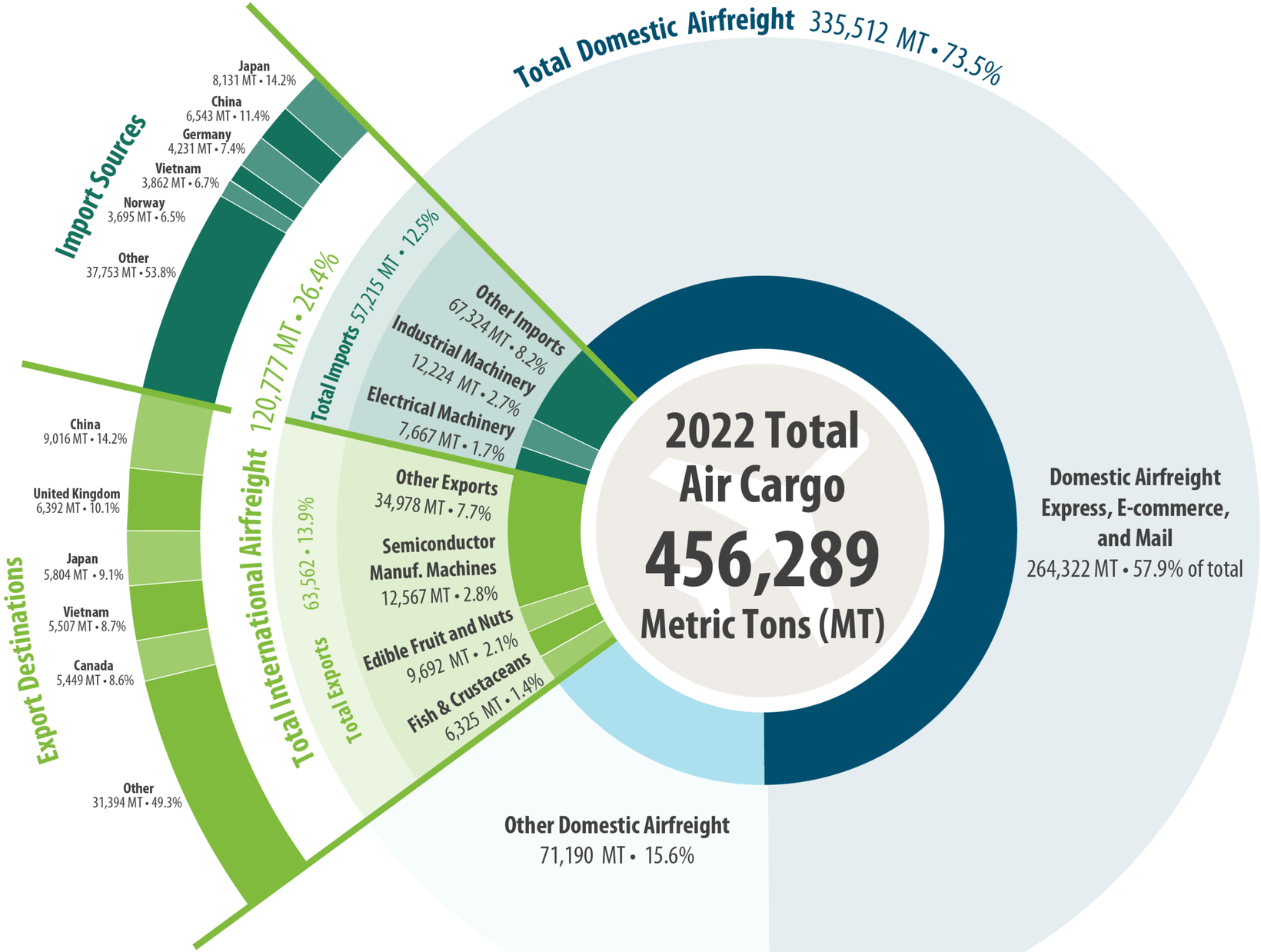
Air Cargo 2022

Total Value of Airfreight

$24.5 billion

Through SEA Airport

- $16 billion Exports
- $8.5 billion Imports



SEA's International Services

2023

Aer Lingus · Aeromexico · Air Canada · Air France · Air Tahiti Nui · Alaska · American · ANA · Asiana
British Airways · Condor · Delta · Emirates · EVA · Finnair · Icelandair · Japan Airlines · Korean Air · Lufthansa
Qatar Airways · Singapore Airlines · Turkish Airlines · Virgin Atlantic · Volaris · WestJet



Some services may be seasonal. Service to Nassau begins Dec 2023. Service to Munich begins May 2024 (not shown)

Air Cargo Statistics

Airline reported data

- Airline data is reported monthly in metric tons (enplaned & deplaned)
- Asia trade-lane tonnage reported for 10+ scheduled airline services
- Reports also show whether freight carried by belly or freighter
  - 69,492 metric tons reported for 2022 – ~60% of total SEA international cargo
  - 14% lower than 2021, 24% down from 2019
  - 63% of Asia trade in 2022 was carried in belly, including 88% of imports
- Asia air cargo trade flows heavily reliant on belly – a risk when passenger services are curtailed
- Data not very informative about two-way WA state trading partners

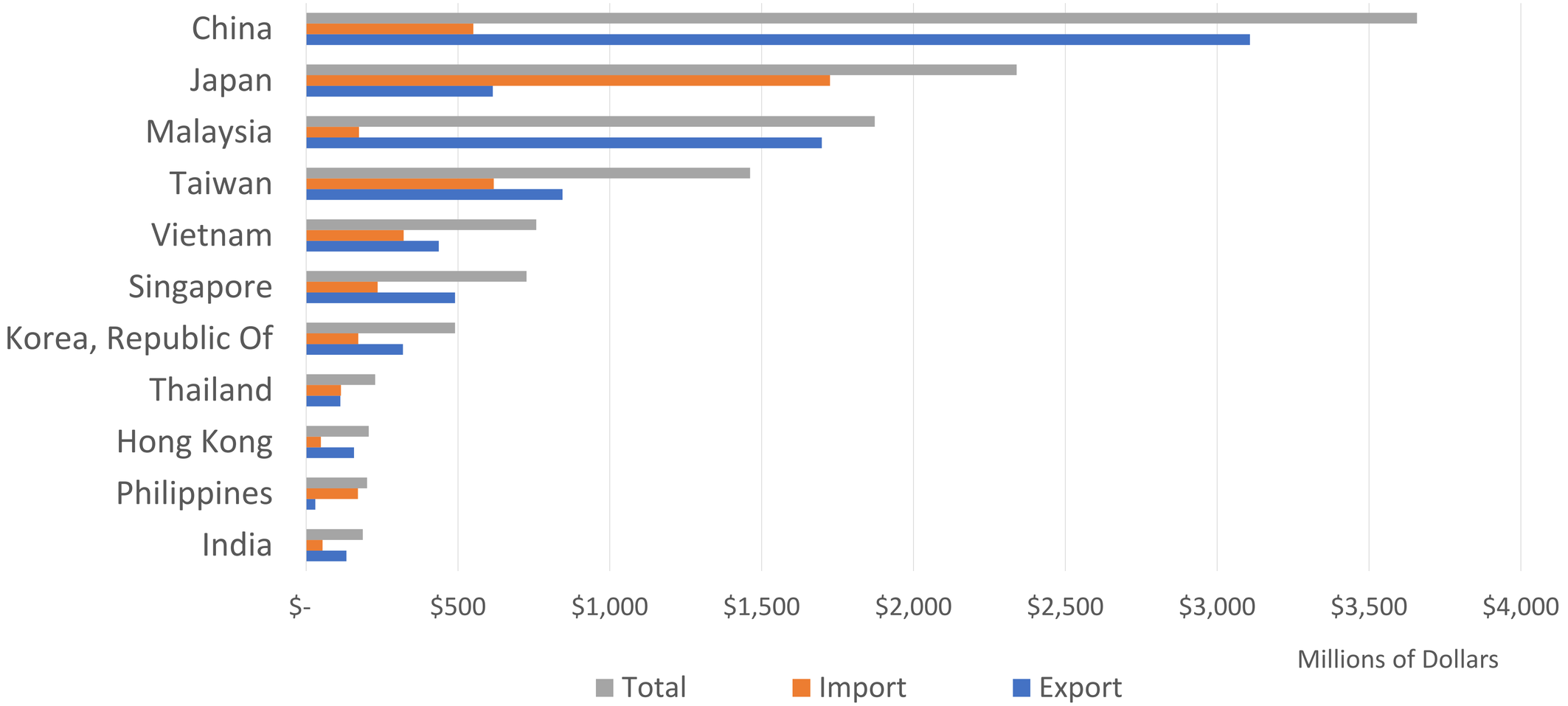
Air Cargo Statistics

Commercially available federal data

- Data is aggregated from US Customs reports – by tons or $ value
- Can be searched by trade partner country and commodity type
- Does not indicate how flown (belly or freighter) or by which airline
  - $13.3 billion value of Asia trade in 2022 – ~54% of total SEA international cargo value
    - 65% of total Asia trade is export ($8.6 billion)
    - Imports and exports hit record values in 2022
  - ~20% increase overall vs. 2021, similar to change from 2019
    - Export growth percentage exceeded import growth
- Year-to-date 2023 (through August) indicating declining trend
- Exports decreasing more than imports, particularly to China, Malaysia & Taiwan

2022 Asia Air Cargo Trade Through SEA

Top Washington State – Asia Trading Partners



Thank You



SEA
Seattle-Tacoma
International
Airport

Operated by the
Port of Seattle

FlySEA.org