

TERMINAL AREA FORECAST EXECUTIVE SUMMARY FISCAL YEARS 2022–2050



**Federal Aviation
Administration**

Preface

This publication provides aviation data users with summary historical and forecast statistics on passenger demand and aviation activity at U.S. airports. The summary level forecasts are based on individual airport projections.

The Terminal Area Forecast (TAF) includes forecasts for active airports in the National Plan of Integrated Airport Systems (NPIAS). The Federal Aviation Administration's (FAA) Forecast and Performance Analysis Division, Office of Aviation Policy and Plans, develops the TAF. The TAF is available on the Internet. The TAF database can be accessed at:

<https://taf.faa.gov>

The TAF contains a query data application that allows the public to access and print historical (1990 to 2021) and forecast (2022 to 2050) aviation activity data by individual airport, state, or FAA region.

The FAA welcomes public comment on the forecasts, as well as suggestions for improving the usefulness of the TAF.

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Summary Historical and Forecast Highlights

- Total passenger enplanements at U.S. airports, including FAA and Non-FAA facilities¹, are estimated to be 823 million enplanements in 2022, an estimated annual increase of 50.6 percent. Total enplanements are forecast to recover in aggregate to their 2019 pre-COVID-19 pandemic level by 2023.
- In 2022, FAA tower airports and FAA contract tower airports are estimated to account for 817.8 million enplanements or 99.4 percent of total enplanements at U.S. airports.
- The top 100 airports are estimated to account for 774 million enplanements in 2022, or 94 percent of total U.S. enplanements.
- FAA tower airports and FAA contract tower airports handled 52.6 million operations in 2022. This figure is a 9.9 percent increase from 2021, following a 7 percent increase from 2020 to 2021. Total operations at these airports are forecast to recover in aggregate to their 2019 level by 2023.
- In 2022 there were 37.7 million total TRACON operations. These operations were a 12.4 percent increase from the 33.5 million operations in 2021. Total TRACON operations are forecast to recover in aggregate to their 2019 level by 2024.
- The 30 large hub airports² enplaned an estimated 576.6 million passengers in 2022. These airports are projected to enplane 1.3 billion passengers in 2050, a 125 percent increase over the 29-year period (or 2.95 percent annually).
- The 34 medium hub airports³ enplaned an estimated 145.4 million enplanements in 2022. These airports are projected to enplane 306.4 million passengers in 2050, a 111 percent increase over the 29-year period (or 2.7 percent annually).
- Atlanta (44.5 million enplanements), Dallas/Ft. Worth (34.8 million), Denver (33.0 million), Chicago O'Hare (32.6 million), and Los Angeles (31.2 million) led U.S. commercial airports in estimated passenger enplanements in 2022, accounting for 21.4 percent of enplanements at U.S. airports.

¹ FAA facilities are FAA Tower Airports and Contract Tower Airports.

² Airports enplaning one percent or more of total enplanements.

³ Airports enplaning 0.25 to 0.99 percent of total enplanements.

- Atlanta is projected to remain the country's busiest airport, as measured by passenger enplanements, through the forecast period with a projected 95.3 million enplaned passengers in 2050. Los Angeles is projected to enplane the second most passengers (78.5 million) in 2050, followed by Denver International with 72.6 million enplanements.
- Enplanements at San Francisco, John F. Kennedy, and San Diego airports are projected to grow fastest among the large hub airports. The annual growth rates at these airports are forecast to increase by 4.3, 3.8, and 3.6 percent per year, respectively, over the forecast period.
- In terms of total operations, Chicago O'Hare was the busiest U.S. airport in 2022 with 727,000 aircraft operations. Atlanta and Dallas/Ft. Worth were the second and third busiest airports with 724,000 and 663,000 operations, respectively.
- In 2050, Atlanta is expected to be the busiest airport in the nation, as measured by total operations, with a projected 1.44 million operations. Chicago O'Hare (1.33 million operations) is projected to be in second place and Dallas/Ft. Worth is projected to be in third place (with 1.19 million operations).
- The FAA's Southern region airports are estimated to enplane more passengers at tower airports than any other region with an estimated 206.5 million passengers in 2022. The Western Pacific region was second with 162.1 million enplanements.
- The Southern region is expected to lead in passenger enplanements at tower airports in 2050, reaching 430.1 million. The Western Pacific region is projected to stay in second place with 389.1 million enplanements.
- The Southern region led all FAA regions in the number of airport operations at tower airports with 12.9 million in 2022. The Southern region is expected to remain first in 2050 with 18.3 million operations. The Western Pacific and Southwest regions ran second and third in airport operations in 2022 with 11.4 and 6.9 million, respectively. In 2050, the Western Pacific region is projected to remain in second place with 16.7 million operations and the Southwest region is projected to remain in third place with 8.4 million operations.

Forecast Trends

Forecast trends are broken down by various groups. Forecast table S-1 summarizes the forecast trends by region. Table S-2 summarizes the forecasts by hub size. Table S-4 and S-4 list the forecasts by airport for the large hub and medium hub groups. Appendix A provides an explanation of the activity data of the detailed elements in the TAF. Appendix B provides a list of FAA tower airports and FAA contract tower airports by hub size for the large, medium, and small hubs.

All forecast tables can be downloaded in Excel format on the following web page in the TAF section:

https://www.faa.gov/data_research/aviation/taf

Trends by Region

Table S-1 shows enplanements and airport operations at the tower airports by FAA region. The Southern region led FAA regions in estimated passenger enplanements at tower airports with 206.5 million in 2022, followed by the Western Pacific region with 162.1 million enplanements, and the Eastern region with 121.7 million enplanements. Enplanements in the Western-Pacific region are projected to increase the fastest with an average annual rate of 3.2 percent from 2022 to 2050. The next two regions with the fastest projected increases in enplanements are Northwest Mountain and New England with average annual forecast rates of 3.0 percent.

In 2022 the Southern (12.9 million operations), Western Pacific (11.4 million operations), and Southwest (6.9 million operations) regions ranked as the top three FAA regions in tower airport operations. The Alaskan (1.4 percent), Western-Pacific (1.4 percent), Northwest Mountain (1.3 percent), and New England (1.3 percent) regions are projected to be the fastest growing FAA regions from 2022 to 2050 in terms of tower airport operations.

Tower Airports by Hub Size

Table S-2 presents passenger enplanements and airport operations at FAA and FAA contract towers by hub size. An airport qualifies as a large hub with one percent or more of total U.S. passenger enplanements. A medium hub airport enplanes from 0.25 to 0.99 percent of total U.S. passenger enplanements while small and non-hub airports enplane from 0.05 to 0.249 percent and less than 0.05 percent, respectively. Appendix B contains a list of hub tower airports classified by size for the large, medium, and small hubs.

The 30 large hub airports enplaned 576.6 million passengers in 2022 while the 34 medium hub airports enplaned 145.4 million, and the 75 small hub airports enplaned 74.4 million. The 386 non-hub airports enplaned 21.4 million passengers. Enplanements at large hubs are expected to increase at an annual rate of 2.9 percent over the 2022 to 2050 forecast period. Medium hub airports are forecast to increase 2.7 percent and small hub airports are forecast to increase 2.1 percent per year.

Operations at large hub airports totaled 11.8 million in 2022 compared to 5.4 million at medium hub airports and 6.7 million at small hub airports. Operations at large hub airports are forecast to increase at an annual rate of 2.2 percent from 2022 to 2050. Operations at the medium hubs are forecast to rise at an annual rate of 1.8 percent from 2022 to 2050; operations at small hub airports are forecast to grow 0.9 percent per year.

In 2022 non-hub airports accounted for 28.8 million operations or 57.4 percent of total operations at FAA and FAA contract towers. General aviation aircraft operations accounted for the majority of operations at the non-hub airports.

Large Hub Airports

Table S-3 presents enplanement forecast summaries for the large hub airports. Atlanta was the busiest airport in 2022 (44.5 million estimated enplanements), followed by Dallas/Ft. Worth (34.8 million), Denver (33.0 million), Chicago O'Hare (32.6 million), and Los Angeles (31.2 million). The ranking of the top five airports in terms of projected enplanements in 2050 is Atlanta (95.3 million), Los Angeles (78.5 million), Denver (72.6 million), Chicago O'Hare (71.9 million), John F. Kennedy (69.8 million), and Dallas-Fort Worth (69.7 million). The three airports with the fastest projected increases in enplanements from 2022 to 2050 are San Francisco (4.3 percent), John F. Kennedy (3.8 percent), and San Diego (3.6 percent).

Table S-4 presents operations forecast summaries for the large hub airports. In 2022, FAA controllers at Chicago O'Hare handled 727,000 landings and takeoffs, followed by Atlanta (724,200 operations), Dallas/Ft. Worth (663,400 operations), and Denver (613,700 operations). The ranking of the top four airports in terms of projected operations in 2050 is Atlanta (1.4 million), Chicago O'Hare (1.3 million), Dallas/Ft. Worth (1.2 million), and Los Angeles (1.2 million). The three airports with the fastest projected increases in operations from 2022 to 2050 are San Francisco (3.3 percent), San Diego (3.3 percent), and Boston (2.9 percent).

Forecast Process

Introduction

The Terminal Area Forecast (TAF) contains historical and forecast data for enplanements, airport operations, TRACON operations, and based aircraft. The data cover 264 FAA tower airports, 260 FAA contract tower airports, 153 terminal radar approach control facilities, and over 2,000 non-FAA airports. Data in the TAF are presented on a U.S. Government fiscal year basis (October through September).

The TAF is prepared to assist the FAA in meeting its planning, budgeting, and staffing requirements. In addition, state aviation authorities and other aviation planners use the TAF as a basis for planning airport improvements.

The forecast process document, which provides an overview on the forecast methodology and the impact of COVID-19 Pandemic on TAF forecasts, can be downloaded through the TAF online website: <https://taf.faa.gov>

Appendix A: Description of Activity Measures

Air Carrier Enplanements

These data summarize domestic enplaned passengers (originations and connections) of U.S. commercial air carriers and international enplanements for both U.S. and foreign flag carriers submitted to the U.S. Department of Transportation (DOT), Bureau of Transportation Statistics (BTS) on T-100 reports. Estimates include both scheduled and non-scheduled enplaned passengers.

Regional Enplanements

Starting in FY 2003, FAA includes in the regional category enplanements for those airlines whose primary function is to provide passenger feed to mainline carriers, regardless of aircraft size. As of October 2002, all scheduled and non-scheduled operations using aircraft with 10 or more seats to transport regional passengers must report on T-100.

Historic enplanement data includes originating passengers on scheduled commuter or regional carriers as reported on DOT Form 41 and 298-C; where possible, adjustments were made to include connecting passengers. Historically, Form 298-C included carriers operating at least five scheduled round trips per week whose entire fleet consists of aircraft having 60 seats or less.

Aircraft Operations

FAA air traffic controllers count landings and takeoffs at FAA towered airports. Controllers employed by an FAA contractor count operations at FAA contract towers. At non-FAA facilities, operations counts represent an estimate.

Air carrier operations represent either takeoffs or landings of commercial aircraft with seating capacity of more than 60 seats.

Commuter/air taxi operations are one category. Commuter operations include takeoffs and landings by aircraft with 60 or fewer seats that transport regional passengers on scheduled commercial flights. Air taxi operations include takeoffs and landings by aircraft with 60 or fewer seats conducted on non-scheduled or for-hire flights.

Itinerant general aviation and local civil operations represent all civil aviation aircraft takeoffs and landings not classified as commercial. Military operations represent takeoffs and landings by military aircraft. Operations are either itinerant or local flights.

Local Operations

Aircraft operating in the traffic pattern or within sight of the tower, or aircraft known to be departing or arriving from flight in local practice areas, or aircraft executing practice instrument approaches at the airport.

Itinerant Operations

FAA reports all aircraft operations other than local operations as itinerant. Essentially, these data represent takeoffs and landings of aircraft going from one airport to another.

Tracon Operations

These data include arrivals, departures, and overflights conducted by an FAA radar approach control facility for aircraft under Instrument Flight Rule (IFR) or Visual Flight Rule (VFR) plans.

Overflights

These data include operations of aircraft in transit through the approach control facility airspace.

Appendix B: List of Large, Medium, and Small Hub Tower Airports

Table B-1 List of Large Hub Towers

Location Identifier	Region	Airport Name	City, State
ATL	ASO	HARTSFIELD-JACKSON ATLANTA INT'L	ATLANTA, GA
AUS	ASW	AUSTIN TOWER	AUSTIN, TX
BNA	ASO	NASHVILLE INTERNATIONAL	NASHVILLE, TN
BOS	ANE	BOSTON/LOGAN INTERNATIONAL	BOSTON, MA
BWI	AEA	BALTIMORE-WASHINGTON INT'L	BALTIMORE, MD
CLT	ASO	CHARLOTTE/DOUGLAS INT'L	CHARLOTTE, NC
DCA	AEA	WASHINGTON NATIONAL	WASHINGTON, DC
DEN	ANM	DENVER INTERNATIONAL	DENVER, CO
DFW	ASW	DALLAS/FT WORTH INT'L	DALLAS-FORT WORTH, TX
DTW	AGL	DETROIT METRO WAYNE CO	DETROIT, MI
EWR	AEA	NEWARK TOWER	NEWARK, NJ
FLL	ASO	FT LAUDERDALE/HOLLYWOOD	FORT LAUDERDALE, FL
IAD	AEA	WASHINGTON DULLES INT'L	WASHINGTON, DC
IAH	ASW	HOUSTON/G BUSH INTERCONT'L	HOUSTON, TX
JFK	AEA	KENNEDY TOWER	NEW YORK, NY
LAS	AWP	LAS VEGAS/MC CARRAN INT'L	LAS VEGAS, NV
LAX	AWP	LOS ANGELES INTERNATIONAL	LOS ANGELES, CA
LGA	AEA	LA GUARDIA	NEW YORK, NY
MCO	ASO	ORLANDO INTERNATIONAL	ORLANDO, FL
MDW	AGL	CHICAGO MIDWAY	CHICAGO, IL
MIA	ASO	MIAMI INTERNATIONAL	MIAMI, FL
MSP	AGL	MINNEAPOLIS-ST PAUL INT'L	MINNEAPOLIS, MN
ORD	AGL	CHICAGO/O'HARE INT'L	CHICAGO, IL
PHL	AEA	PHILADELPHIA INTERNATIONAL	PHILADELPHIA, PA
PHX	AWP	PHOENIX SKY HARBOR INTL	PHOENIX, AZ
SAN	AWP	SAN DIEGO INT'L/LINDBERGH	SAN DIEGO, CA
SEA	ANM	SEATTLE TACOMA INT'L	SEATTLE, WA
SFO	AWP	SAN FRANCISCO INT'L	SAN FRANCISCO, CA
SLC	ANM	SALT LAKE CITY INT'L	SALT LAKE CITY, UT
TPA	ASO	TAMPA INTERNATIONAL	TAMPA, FL

Listed 30 Airports

Table B-2 List of Medium Hub Towers

Location Identifier	Region	Airport Name	City, State
ABQ	ASW	ALBUQUERQUE INTERNATIONAL	ALBUQUERQUE, NM
ANC	AAL	ANCHORAGE INTERNATIONAL	ANCHORAGE, AK
BDL	ANE	WINDSOR LOCKS/BRADLEY INTL	WINDSOR LOCKS, CT
BOI	ANM	BOISE AIR TERMINAL	BOISE, ID
BUR	AWP	BURBANK-GLENDALE-PASADENA	BURBANK, CA
CHS	ASO	CHARLESTON AFB/INT'L	CHARLESTON, SC
CLE	AGL	CLEVELAND HOPKINS INT'L	CLEVELAND, OH
CMH	AGL	PORT COLUMBUS INT'L	COLUMBUS, OH
CVG	ASO	COVINGTON/CINCINNATI INT'L	COVINGTON, KY
DAL	ASW	DALLAS LOVE FIELD	DALLAS, TX
HNL	AWP	HONOLULU INTERNATIONAL	HONOLULU, HI
HOU	ASW	HOUSTON HOBBY	HOUSTON, TX
IND	AGL	INDIANAPOLIS INTERNATIONAL	INDIANAPOLIS, IN
JAX	ASO	JACKSONVILLE INT'L	JACKSONVILLE, FL
MCI	ACE	KANSAS CITY INTERNATIONAL	KANSAS CITY, MO
MEM	ASO	MEMPHIS TOWER	MEMPHIS, TN
MKE	AGL	MILWAUKEE/GEN MITCHELL INT	MILWAUKEE, WI
MSY	ASW	NEW ORLEANS INT'L/MOISANT	NEW ORLEANS, LA
OAK	AWP	OAKLAND TOWER	OAKLAND, CA
OGG	AWP	MAUI/KAHULUI	KAHULUI, HI
OMA	ACE	OMAHA	OMAHA, NE
ONT	AWP	ONTARIO INTERNATIONAL	ONTARIO, CA
PBI	ASO	PALM BEACH INTERNATIONAL	WEST PALM BEACH, FL
PDX	ANM	PORTLAND INTERNATIONAL	PORTLAND, OR
PIT	AEA	PITTSBURGH INTERNATIONAL	PITTSBURGH, PA
RDU	ASO	RALEIGH-DURHAM INT'L	RALEIGH/DURHAM, NC
RNO	AWP	RENO/TAHOE INTERNATIONAL	RENO, NV
RSW	ASO	FT MYERS/SW FL INT'L	FORT MYERS, FL
SAT	ASW	SAN ANTONIO INTERNATIONAL	SAN ANTONIO, TX
SJC	AWP	SAN JOSE TOWER	SAN JOSE, CA
SJU	ASO	SAN JUAN INTERNATIONAL	SAN JUAN, PR
SMF	AWP	SACRAMENTO INTERNATIONAL	SACRAMENTO, CA
SNA	AWP	SANTA ANA/JOHN WAYNE	SANTA ANA, CA
STL	ACE	LAMBERT-ST LOUIS INT'L	ST LOUIS, MO

Listed 34 Airports

Table B-3 List of Small Hub Towers

Location Identifier	Region	Airport Name	City, State
ABE	AEA	ALLENTOWN/LEHIGH VALLEY	ALLENTOWN, PA
ACY	AEA	ATLANTIC CITY INT'L	ATLANTIC CITY, NJ
ALB	AEA	ALBANY COUNTY	ALBANY, NY
ATW	AGL	APPLETON/OUTAGAMIE COUNTY	APPLETON, WI
AVL	ASO	ASHEVILLE REGIONAL	ASHEVILLE, NC
BHM	ASO	BIRMINGHAM	BIRMINGHAM, AL
BTV	ANE	BURLINGTON TOWER	BURLINGTON, VT
BUF	AEA	GREATER BUFFALO INT'L	BUFFALO, NY
BZN	ANM	BOZEMAN/GALLATIN FIELD	BOZEMAN, MT
CAE	ASO	COLUMBIA METROPOLITAN	COLUMBIA, SC
CHA	ASO	CHATTANOOGA/LOVELL FIELD	CHATTANOOGA, TN
CID	ACE	CEDAR RAPIDS	CEDAR RAPIDS, IA
COS	ANM	COLORADO SPRINGS MUNICIPAL	COLORADO SPRINGS, CO
DAY	AGL	DAYTON INTERNATIONAL	DAYTON, OH
DSM	ACE	DES MOINES INTERNATIONAL	DES MOINES, IA
ECP	ASO	NORTHWEST FLORIDA BEACHES INTL	PANAMA CITY, FL
ELP	ASW	EL PASO INTERNATIONAL	EL PASO, TX
EUG	ANM	EUGENE/M SWEET FIELD	EUGENE, OR
EYW	ASO	KEY WEST INTERNATIONAL	KEY WEST, FL
FAI	AAL	FAIRBANKS TOWER	FAIRBANKS, AK
FAR	AGL	FARGO/HECTOR INTERNATIONAL	FARGO, ND
FAT	AWP	FRESNO YOSEMITE INT'L	FRESNO, CA
FSD	AGL	SIOUX FALLS/FOSS FIELD	SIOUX FALLS, SD
GEG	ANM	SPOKANE INTERNATIONAL	SPOKANE, WA
GPI	ANM	GLACIER PARK INTL (FCA-KALISPELL)	KALISPELL, MT
GRR	AGL	GRAND RAPIDS/KENT CO INT'L	GRAND RAPIDS, MI
GSO	ASO	GREENSBORO/PIEDMONT TRIAD	GREENSBORO, NC
GSP	ASO	GREENVILLE-SPARTANBURG	GREER, SC
HPN	AEA	WHITE PLAINS/WESTCHESTER	WHITE PLAINS, NY
HRL	ASW	HARLINGEN/VALLEY INT'L	HARLINGEN, TX
HSV	ASO	HUNTSVILLE TOWER	HUNTSVILLE, AL
ICT	ACE	WICHITA MID CONTINENT	WICHITA, KS
ILM	ASO	WILMINGTON/NEW HANOVER INT	WILMINGTON, NC
ISP	AEA	ISLIP/LONG ISL. MACARTHUR	NEW YORK, NY
ITO	AWP	HILO INTERNATIONAL	HILO, HI
IWA	AWP	PHOENIX/WILLIAMS GATEWAY	PHOENIX, AZ
JAN	ASO	JACKSON INTERNATIONAL	JACKSON, MS
KOA	AWP	KAILUA/KONA INTERNATIONAL	KAILUA/KONA, HI
LBB	ASW	LUBBOCK INTERNATIONAL	LUBBOCK, TX
LEX	ASO	LEXINGTON/BLUE GRASS	LEXINGTON, KY
LGB	AWP	LONG BEACH/DAUGHTERY FIELD	LONG BEACH, CA
LIH	AWP	LIHUE	LIHUE, HI
LIT	ASW	LITTLE ROCK ADAMS FIELD	LITTLE ROCK, AR

Continued on next page

Location Identifier	Region	Airport Name	City, State
MAF	ASW	MIDLAND INTERNATIONAL	MIDLAND, TX
MDT	AEA	HARRISBURG INTERNATIONAL	HARRISBURG, PA
MFE	ASW	MC ALLEN/MILLER INT'L	MC ALLEN, TX
MFR	ANM	MEDFORD/ROGUE VALLEY INT'L	MEDFORD, OR
MHT	ANE	MANCHESTER	MANCHESTER, NH
MSN	AGL	MADISON/DANE CNTY REGIONAL	MADISON, WI
MSO	ANM	MISSOULA INTERNATIONAL	MISSOULA, MT
MYR	ASO	MYRTLE BEACH INTERNATIONAL	MYRTLE BEACH, SC
OKC	ASW	OKLAHOMA CITY/WILL ROGERS	OKLAHOMA CITY, OK
ORF	AEA	NORFOLK INTERNATIONAL	NORFOLK, VA
PGD	ASO	PUNTA GORDA	PUNTA GORDA, FL
PIE	ASO	ST PETERSBURG CLEARWATER	ST PETERSBURG-CLEARWATER, FL
PNS	ASO	PENSACOLA REGIONAL	PENSACOLA, FL
PSP	AWP	PALM SPRINGS REGIONAL	PALM SPRINGS, CA
PVD	ANE	PROVIDENCE	PROVIDENCE, RI
PWM	ANE	PORTLAND INT'L JETPORT	PORTLAND, ME
RDM	ANM	REDMOND/ROBERTS FIELD	REDMOND, OR
RIC	AEA	RICHMOND INTERNATIONAL	RICHMOND, VA
ROC	AEA	GREATER ROCHESTER INT'L	ROCHESTER, NY
SAV	ASO	SAVANNAH INTERNATIONAL	SAVANNAH, GA
SBA	AWP	SANTA BARBARA MUNICIPAL	SANTA BARBARA, CA
SDF	ASO	LOUISVILLE INTL/STANDIFORD	LOUISVILLE, KY
SFB	ASO	ORLANDO/SANFORD	ORLANDO, FL
SGF	ACE	SPRINGFIELD-BRANSON RGNL	SPRINGFIELD, MO
SRQ	ASO	SARASOTA BRADENTON	SARASOTA/BRADENTON, FL
STT	ASO	CYRIL E KING	CHARLOTTE AMALIE, VI
SYR	AEA	SYRACUSE HANCOCK INT'L	SYRACUSE, NY
TUL	ASW	TULSA INTERNATIONAL	TULSA, OK
TUS	AWP	TUCSON INTERNATIONAL	TUCSON, AZ
TYS	ASO	KNOXVILLE/MCGHEE TYSON	KNOXVILLE, TN
VPS*	ASO	VALPARAISO/EGLIN AFB	VALPARAISO/DESTIN-FT WALTON BEACH, FL
XNA	ASW	NORTHWEST ARKANSAS TOWER	FAYETTEVILLE/SPRINGDALE/ROGERS, AR

Listed 75 Airports

VPS is a Small Hub Airport but not an FAA Facility