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AIR CARGO ELEMENT

2024 Update

Olga Perez
Planning Program Specialist

Aviation Technical Subcommittee
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Presentation Outline

- Scope of work
 - Background and Purpose
 - Project Phases
 - Timeline
 - Structure of the report
- Next steps



“ The air cargo industry has become an **indispensable** part of the world’s global economy, holding an important niche in the **transport of lightweight, high-value commodities.** ”

Andreea Popescu, Pinar Keskinocak, and Issam al Mutawaly
Chapter 7: The Air Cargo Industry



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SCOPE OF WORK

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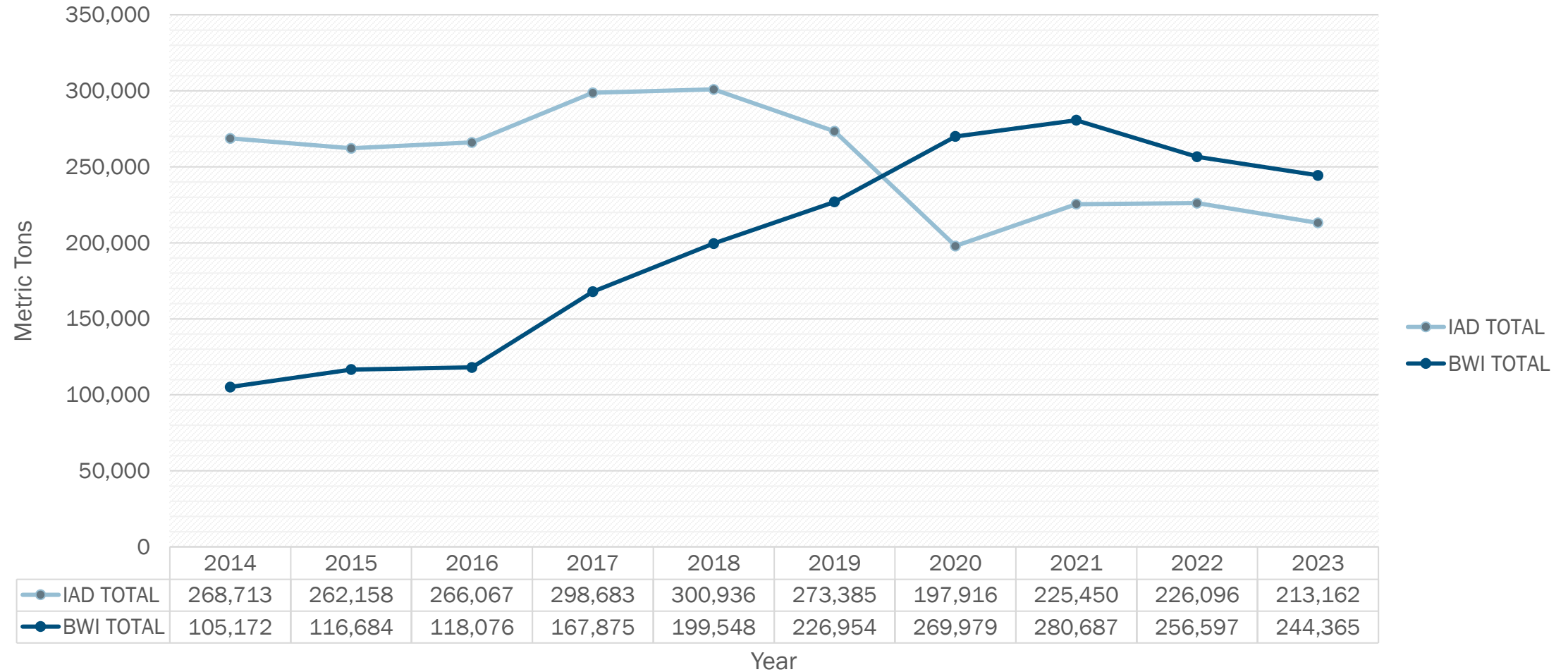


WASHINGTON BALTIMORE REGIONAL AIR CARGO STUDY 2015

- The air cargo component was **last examined in 2015**
- The study in 2015 focused on evaluating the **suitability** of current cargo facilities to accommodate future air cargo demand.
- Past Air Cargo Element studies were conducted periodically, with previous assessments completed in **2008** and **1997**.
- Analysis focused on the air cargo demand at Baltimore Washington International Thurgood Marshall Airport (**BWI**) in Maryland and Washington Dulles International Airport (**IAD**) in Virginia.



Cargo Volume by airport



Sources: Statistics - BWI Airport, Dulles Air traffic statistics - IAD Airport, and COG National Capital Region Freight Plan, 2023 Update



WASHINGTON-BALTIMORE REGIONAL AIR CARGO STUDY – 2015

February 2017



Source: 2015 Washington-Baltimore Regional Air Cargo Study - cover (COG)

Project Purpose

- Analyze the capacity for delivering high-value, just-in-time air cargo services.
- Identify bottlenecks in ground accessibility that hinder the efficient transfer of air cargo shipments from airports to their final destinations.
- Provide recommendations based on the analysis to enhance ground access for the distribution of air cargo shipments.
- Serve as a comprehensive guide for strategic planning across the Washington-Baltimore region.

Data Sources

- Census Bureau
- U.S. Department of Labor, Bureau of Labor Statistics
- District of Columbia Department of Employment Services
Office of Labor Market Research and Information
- Maryland Department of Labor, Licensing and
Regulation, Office of Workforce Information and
Performance
- FHWA, (Federal Highway Administration)
- Airports Council International - North America

Stakeholders

MWAA

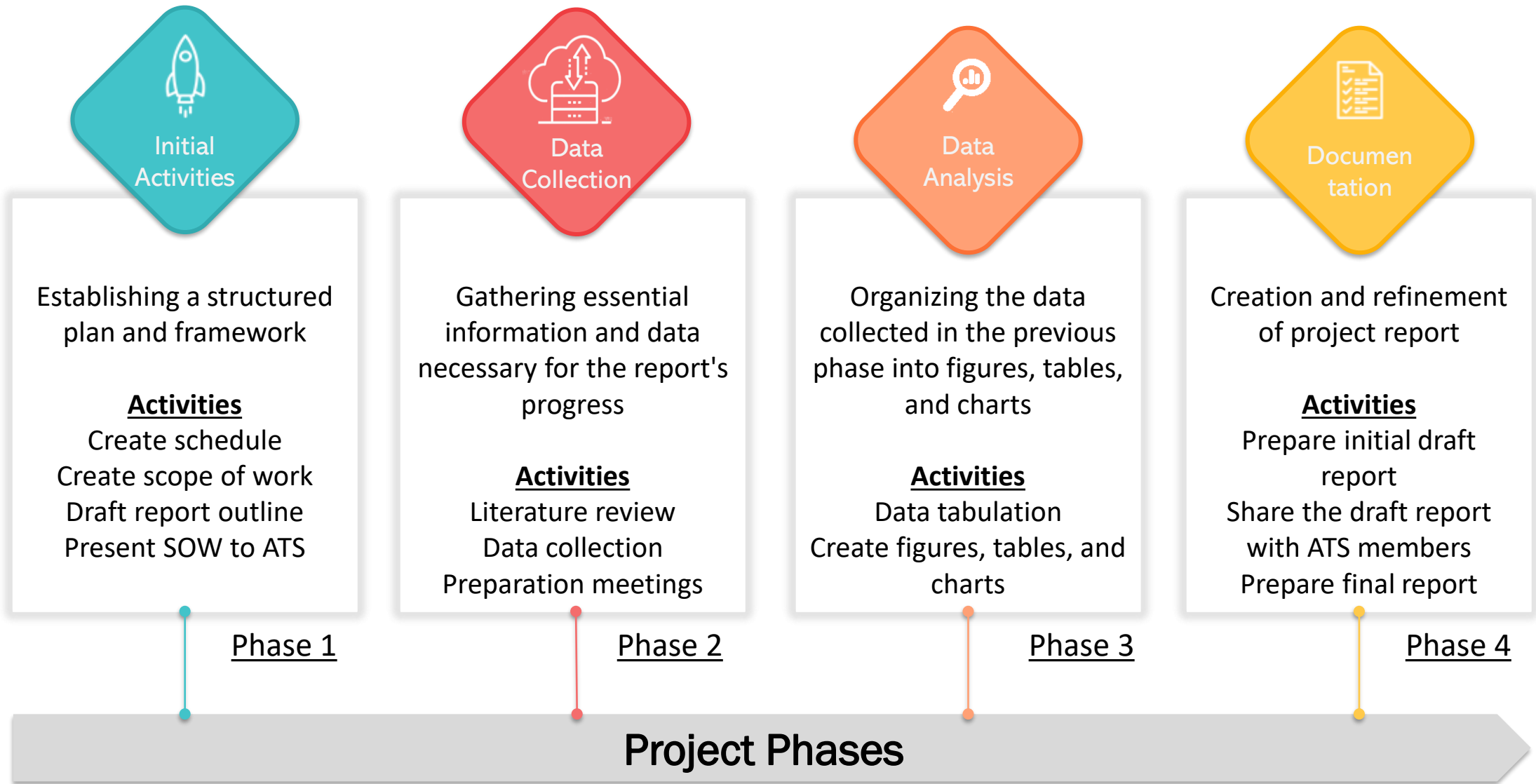
MAA

FAA

COG/TPB Freight
Subcommittee

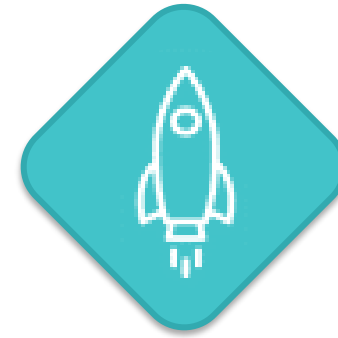
Source: Defense Visual Information Distribution Service





Initial Activities

This plan lays out the foundation of what needs to be done, how it'll be done, and when it'll happen. It's about setting up a clear structure that guides our actions, ensures everyone knows their role, and keeps us on track to achieve success. Just like a well-built framework supports a strong building, this structured plan supports the smooth progress and ultimate completion of our project.



LIST OF TASKS

- Create scope of work and schedule
- Review scope of work
- Draft outline
- Internal review of the outline
- Present and address ATS comments
- Internal review



Data Collection

The focus of this phase is on collecting essential data including population estimates and forecasts, commodities, annual unemployment rates, and historic and forecasted Air Cargo volumes for both IAD and BWI airports. Additionally, we are gathering information on airport facilities used for cargo distribution and storage. This comprehensive data collection ensures that our report is well-informed and enables a thorough analysis of the factors influencing air cargo operations within the region.



LIST OF TASKS

- Literature review
- Data collection
- Preparation of meetings
- Conduct meetings with stakeholders
- Consult with the COG/TPB Freight Subcommittee



Data Analysis

To effectively present the collected data, we begin by organizing and tabulating it into a concise format that meets the report needs. Following this process is the creation of visuals. Our data analysis aims to clearly communicate information on changes over time, including population dynamics, air cargo volumes, airport facilities, and more. Additionally, it serves as the foundation for the recommendations provided at the conclusion of the document.



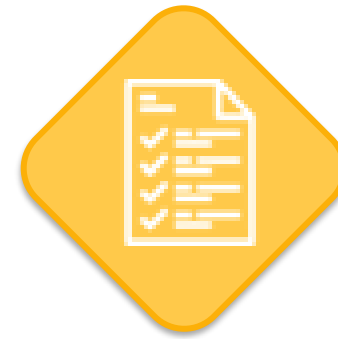
LIST OF TASKS

- Data tabulation
- Create figures, tables, and charts
- Coordinate with COG/TPB GIS team with the creation of maps



Documentation

This goal encompasses the structured compilation of project-related information into a coherent narrative, followed by a meticulous refinement process to enhance clarity, accuracy, and persuasiveness. The ultimate goal is to produce a polished and comprehensive report that serves as a valuable resource for stakeholders, facilitating informed decision-making and contributing to the project's overall success.



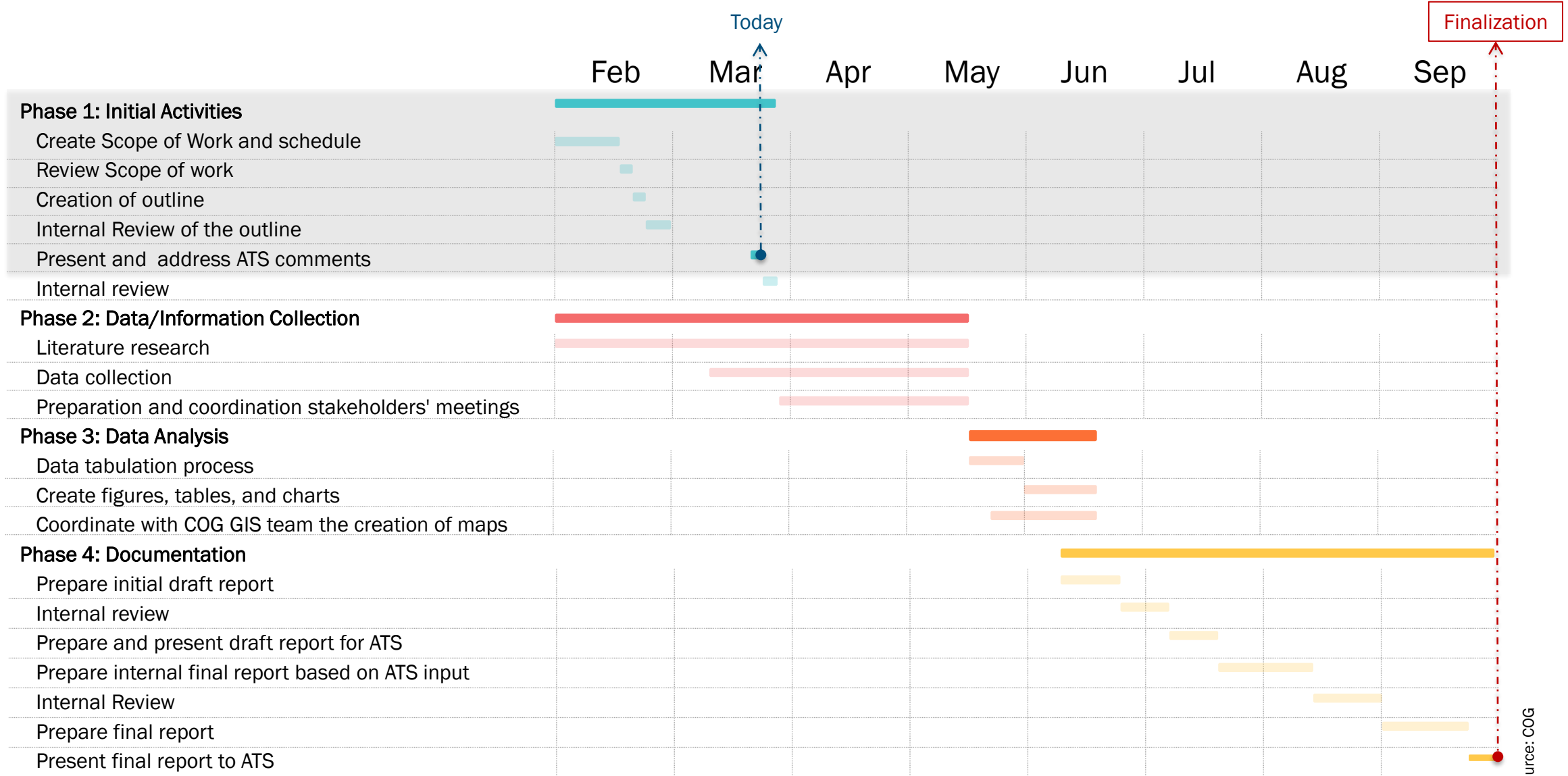
LIST OF TASKS

- Prepare initial draft report
- Internal review
- Prepare and present draft report for ATS
- Prepare internal final report based on ATS input
- Prepare final report
- Present final report to ATS

Note: Periodic briefings will be made to the COG/TPB Freight Subcommittee.



Tentative Timeline



Source: COG

The dates and duration of the task are flexible and may be adjusted as needed.

Note: Periodic briefings will be made to the COG/TPB Freight Subcommittee.



Tentative Report Outline

- **Introduction**

- Regional Air System Planning, Washington-Baltimore Air System Planning Region
- Air Cargo characteristics and regional air cargo market
- Washington-Baltimore Region Industrial and Demographic Profile (population, labor force and unemployment, at-place employment, and income)

- **Air cargo demand analysis**

- Residential and commercial demand
- Job, commodities, and the growth the air cargo industry both nationally and within the Washington-Baltimore region

- **Regional airport cargo facilities**

- For BWI and IAD

- **Accessibility analysis**

- For BWI and IAD

- **Recommendation**



Next steps

- **Finalizing the Scope of Work**
- Conduct literature review and data collection
- Arrange meetings with airport stakeholders
- Coordinate discussions with COG/TPB Freight Subcommittee members



Thank you!

Questions or Comments?



Olga Perez

Planning Program Specialist
(202) 962-3265
opelaez@mwkog.org

mwkog.org/tpb

Metropolitan Washington Council of Governments
777 North Capitol Street NE, Suite 300
Washington, DC 20002

