



Seattle-Tacoma
International
Airport

SEA Airport Updates

Global Business Travel Association
Puget Sound Chapter

March 2026 Meeting



GBTA | Puget Sound

Agenda

- **Welcome**
- **Air Service Update & Outlook**
- **FIFA Update**



SEA Air Service Update

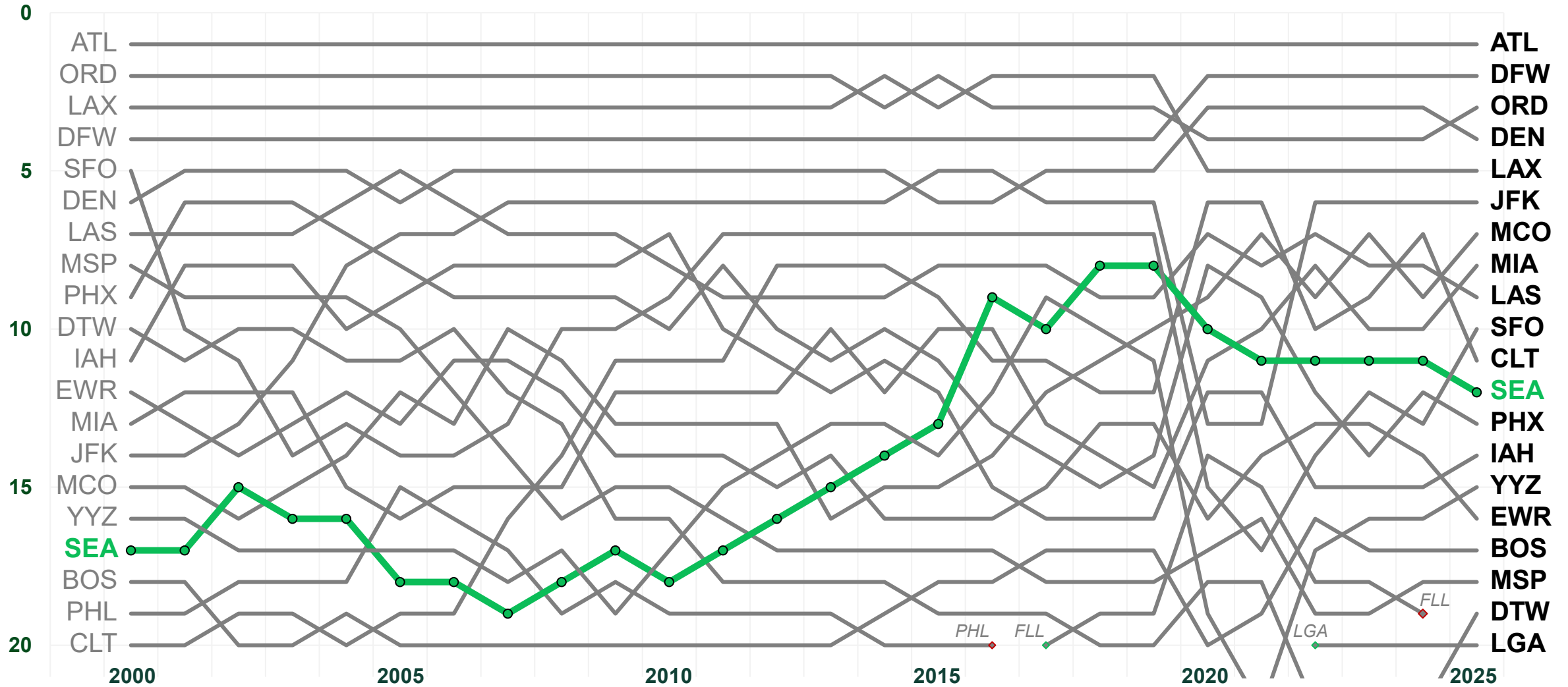
Ian Sharma

Head of Air Service Development
Seattle-Tacoma International Airport

March 18, 2026 – PSBTA Meeting
SEA Airport Conference Center

SEA is the 12th busiest airport in North America

North American Airport Rankings, 2000-2025











Source: World airport ranking from Airports Council International, 2024. Airport data from individual airports, 2025

SEA launched 5 services in 2025, with 7 planned for 2026

2021	
 QATAR AIRWAYS القطرية	DOHA New entrant carrier Unserved market
 DELTA	LONDON
 WESTJET	CALGARY New entrant carrier

2022	
 TURKISH AIRLINES	ISTANBUL New entrant carrier Unserved market
 AIR CANADA	MONTREAL Unserved market
 FINNAIR	HELSINKI New entrant carrier Unserved market

2023	
 WESTJET	EDMONTON

2024	
 Alaska	TORONTO
 HAINAN AIRLINES	CHONGQING Unserved market
 Lufthansa	MUNICH Unserved market
 DELTA	TAIPEI
 CHINA AIRLINES	TAIPEI New entrant carrier
 STARLUX 星宇航空	TAIPEI New entrant carrier
 Philippine Airlines	MANILA New entrant carrier Unserved market
 Alaska	LIBERIA Unserved market

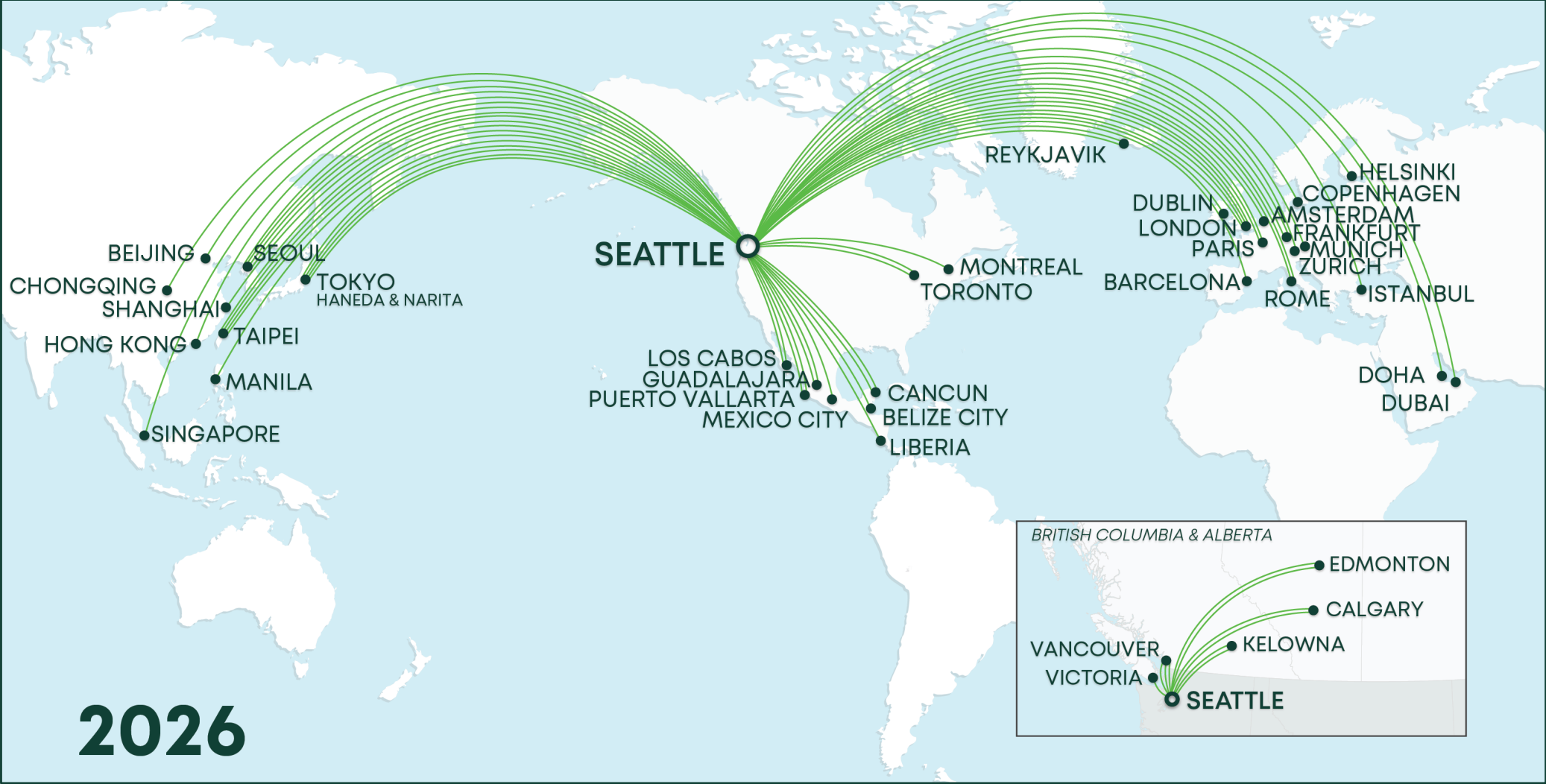
2025	
 WESTJET	KELOWNA Unserved Market
 Alaska	TOKYO-NARITA
 SAS	COPENHAGEN New entrant carrier Unserved Market
 edelweiss	ZURICH New entrant carrier Unserved Market
 Alaska	SEOUL

2026	
 CATHAY PACIFIC	HONG KONG New entrant carrier Unserved Market
 Alaska	ROME Unserved Market
 DELTA	ROME Unserved Market
 DELTA	BARCELONA Unserved Market
 Alaska	REYKJAVIK
 Alaska	LONDON
 AEROMEXICO	GUADALAJARA

SEA has seen tremendous growth in the past 15 years

Currently 58 international services, with 30 airlines serving 36 destinations

- Aer Lingus
- Aeromexico
- Air Canada
- Air France
- Alaska
- ANA
- Asiana
- British Airways
- Cathay Pacific
- China Airlines
- Condor
- Delta
- Edelweiss
- Emirates
- EVA
- Finnair
- Hainan
- Icelandair
- Japan Airlines
- Korean
- Lufthansa
- Philippine Airlines
- Qatar
- SAS
- Singapore
- Starlux
- Turkish
- Virgin Atlantic
- Volaris
- WestJet



Top Seattle International O&D Markets (CY 2025)

#	Market	Annual Pax	Daily Pax	Avg. Fare	Nonstop Service
1	London	311,708	427	\$713	AS <i>(begins 5/26)</i> , BA, DL, VS
2	Tokyo	233,826	320	\$716	AS ^{5/25} , DL, JL, NH
3	Cancun	200,864	275	\$334	AS, DL
4	San Jose del Cabo	200,500	275	\$230	AS, DL
5	Puerto Vallarta	163,481	224	\$278	AS, DL
6	Seoul	170,394	233	\$716	AS ^{9/25} , DL, KE, OZ
7	Taipei	145,516	199	\$866	BR, CI, DL, JX
8	Guadalajara	145,516	199	\$232	Y4
9	Toronto	143,551	196	\$301	AC, AS
10	Frankfurt	127,879	175	\$1,121	DE, LH
11	Paris	119,523	164	\$1,104	AF, DL
12	Vancouver	118,104	171	\$38	AC, AS, DL
13	Calgary	100,972	140	\$97	AS, WS
14	Dublin	93,076	128	\$843	EI
15	Delhi	92,407	127	\$792	-
16	Amsterdam	89,029	122	\$887	DL
17	Manila	88,082	121	\$727	PR
18	Dublin	93,076	128	\$843	EI
19	Mexico City	85,112	117	\$371	AM
20	Singapore	66,851	92	\$1,421	SQ

Source: Cirium FMTraffic. Annual pax are bi-directional total; daily pax are each way (PDEW). Fares are one-way excluding taxes and fees.

Drivers of airport growth in Seattle show mixed outlook

R
E
G
I
O
N
A
L



Regional Population

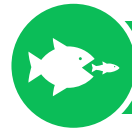


Income/Job Growth

A
I
R
P
O
R
T



Int'l and Domestic Route Expansion



Competitive Position



Airport Capacity

G
L
O
B
A
L



Aircraft Deliveries/Availability



Geopolitical Stability



Fuel Prices



Alaska & Delta International Hub Operations at SEA





Seattle is one of the largest hubs on the West Coast, offering significant connecting capacity for partners

Top West Coast Hubs by Avg. Daily U.S./Canada Departures August 2026

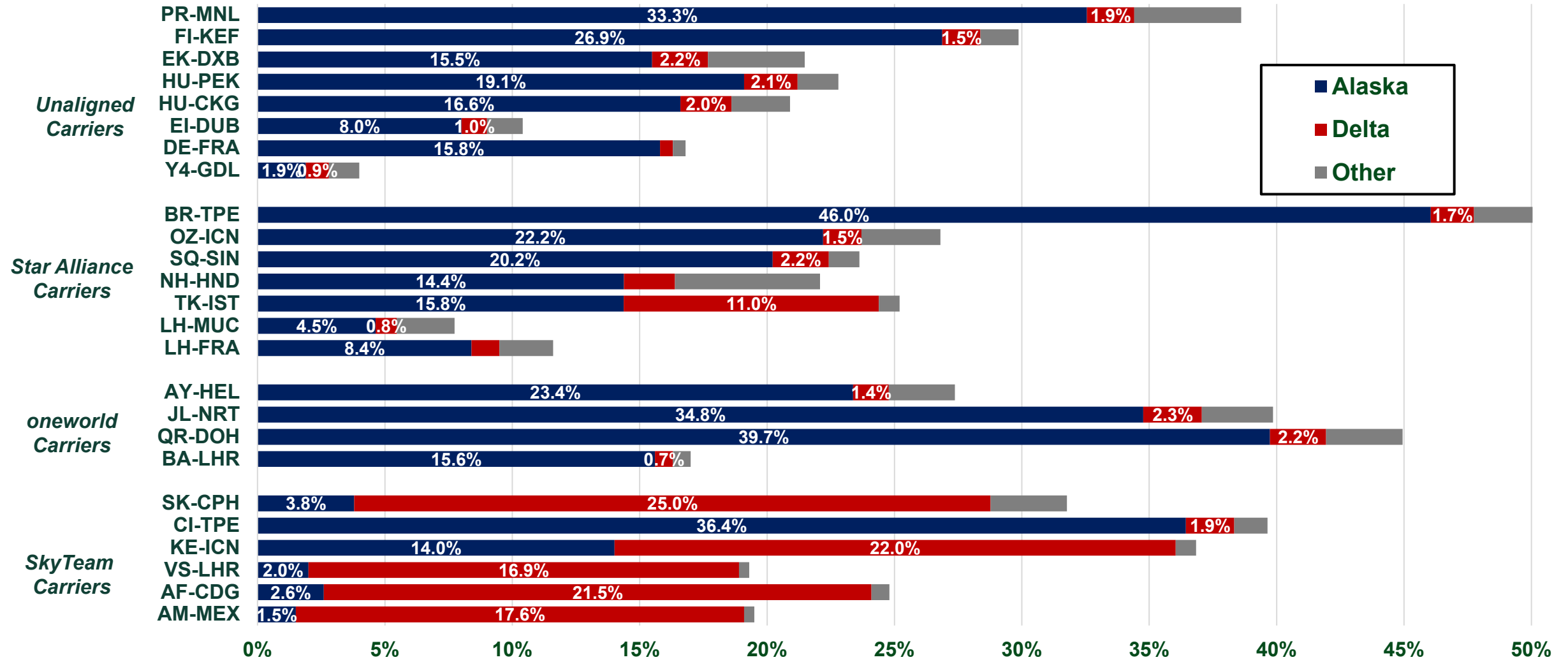


Source: Diio Schedules



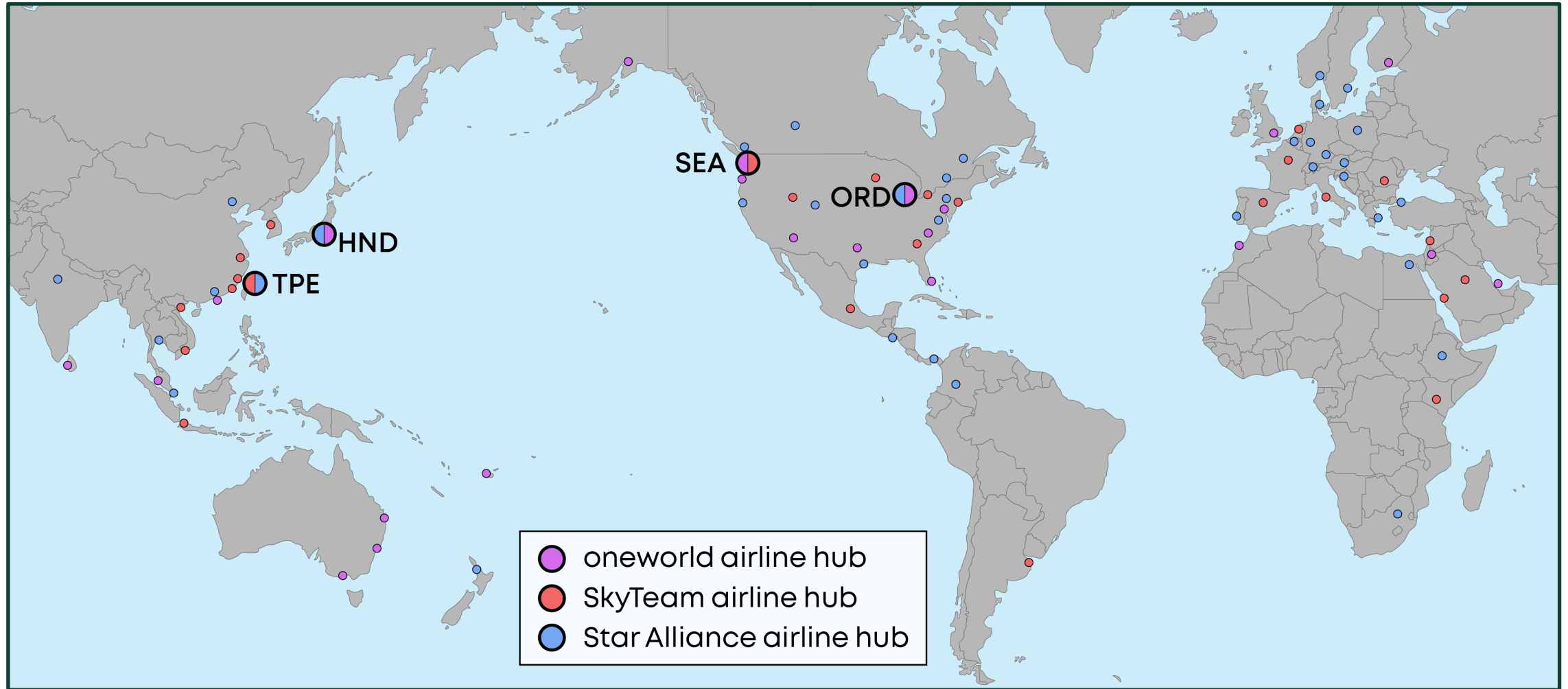
SEA's Foreign Flag flights carry significant connecting passengers

% of Total Passengers Connecting in SEA by connecting carrier
YE 10/2025



Source: Cirium FMTraffic Data

SEA is one of very few airports worldwide that serve as a hub for more than one alliance

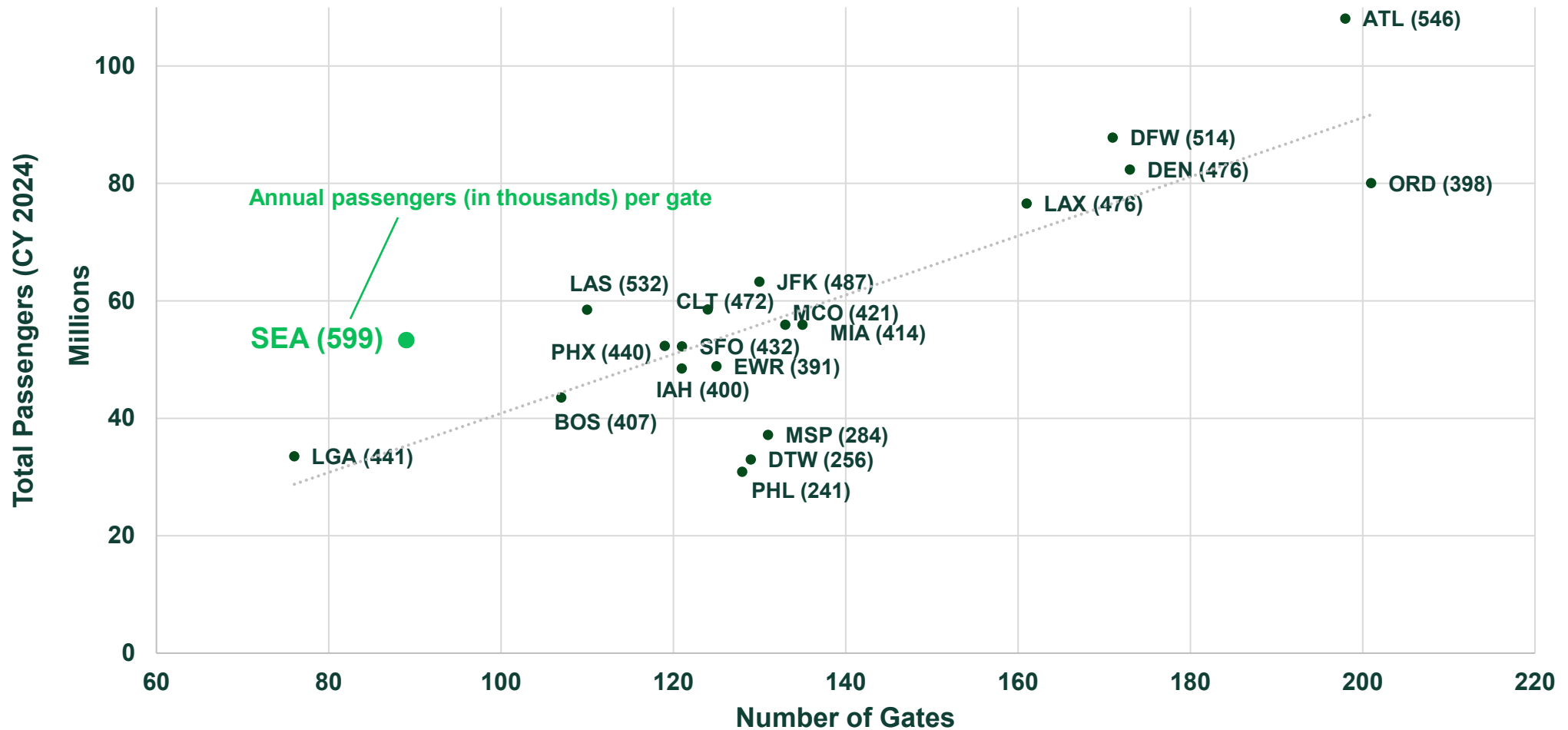


Includes airports designated an official hub by an alliance member airline that had at least 20% of the airport's market share



SEA has ~30% less gate capacity than airports with similar passenger volumes

Passengers vs Number of Gates, US top 20 airports

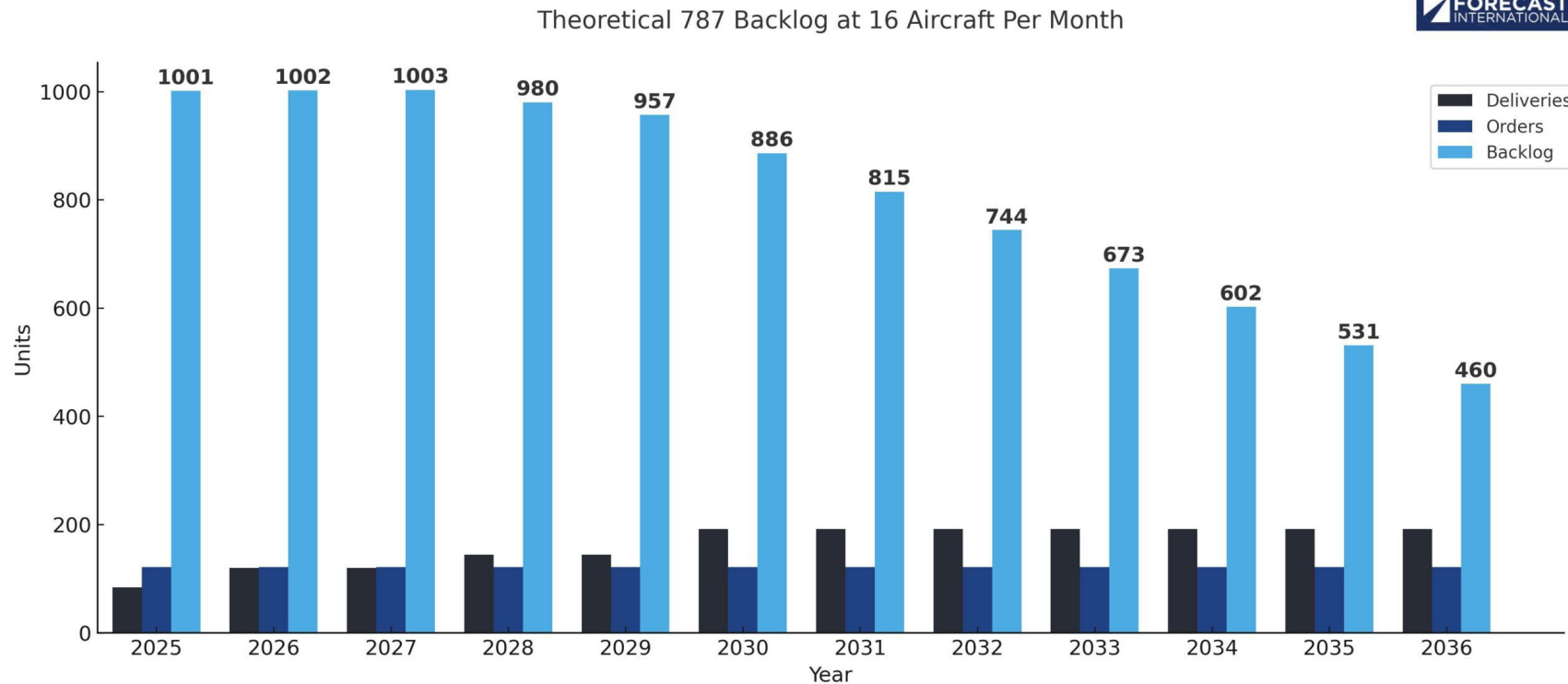


Source: Reported by Airports & Airlines

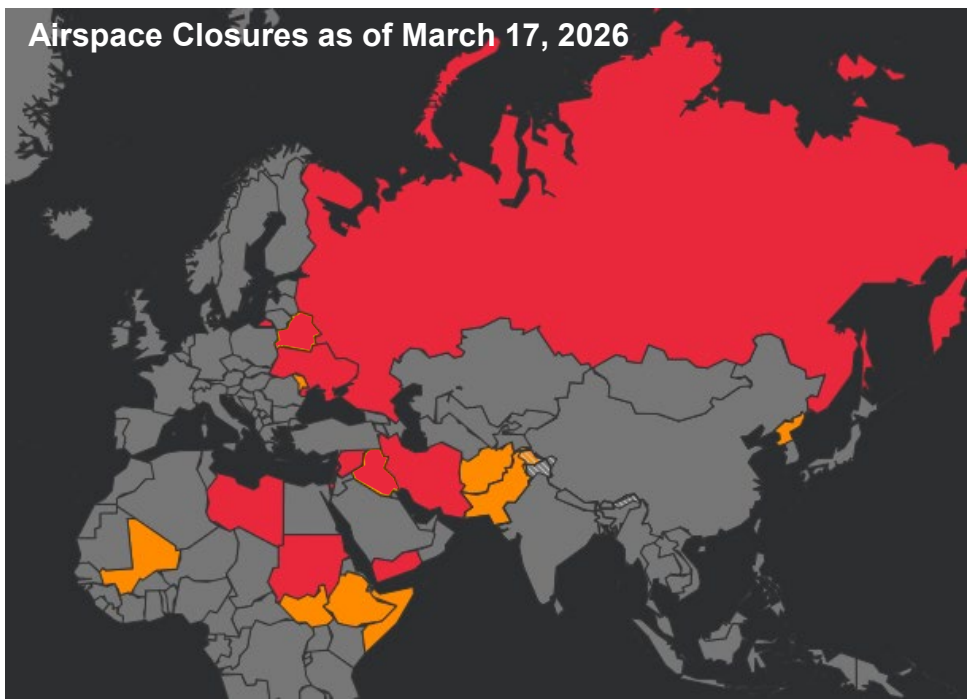


Aircraft deliveries remain backlogged, but light at end of the tunnel (hopefully)

- Aircraft availability has been one of the biggest constraints on airlines since the pandemic
- Current backlog would take 12 years to fill at current production rates, with no new orders
- Backlog remains high, but both Airbus and Boeing have increased delivery rate of widebody aircraft



Recent ME events have dramatically altered landscape for pax to Middle East and South Asia



Largest Markets for Emirates and Qatar's Seattle Flights

Dubai
Delhi
Doha
Bangalore
Hyderabad
Mumbai
Chennai
Nairobi
Kochi
Ahmedabad
Cairo
Karachi
Jeddah
Addis Ababa
Islamabad
Lahore
Colombo
Thiruvananthapuram
Johannesburg
Kathmandu
Amritsar

In 2025, 45% of Seattle-India traffic flew on either Emirates or Qatar

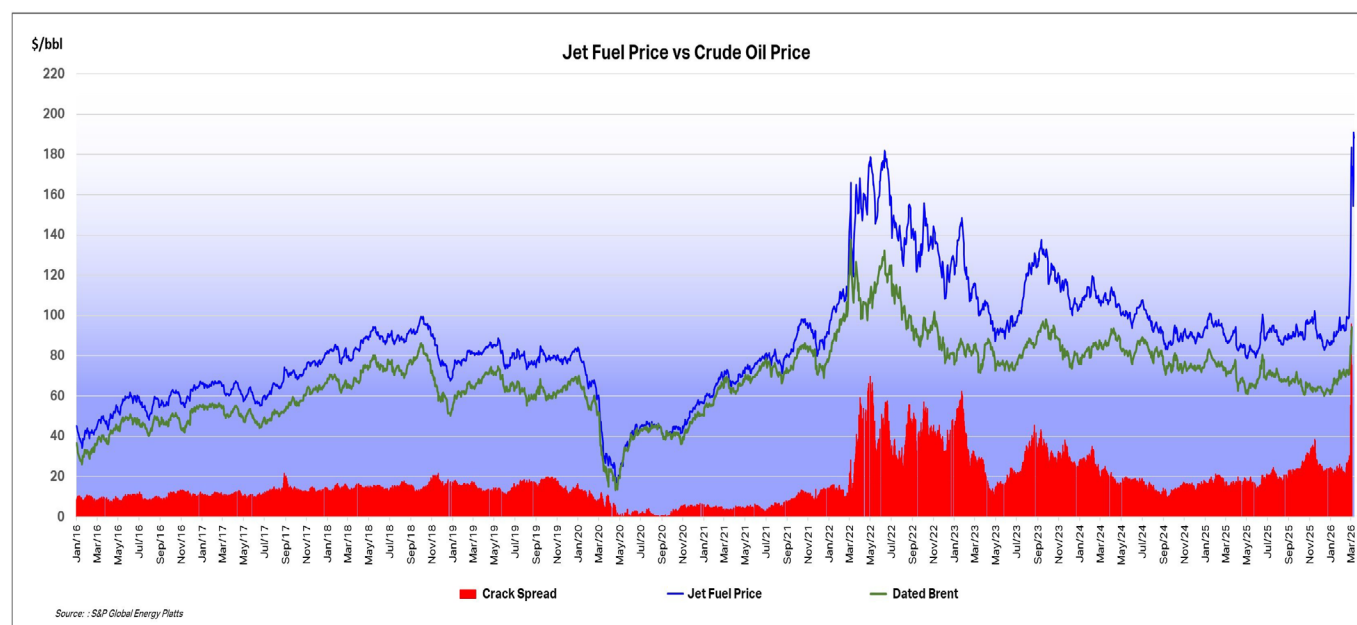
	<p>SEATTLE — DUBAI Reduced from daily to 3x/week; sporadic airspace closures. Many connecting flights not operating.</p>
	<p>SEATTLE — DOHA Cancelled through at least end of March. Airspace closed.</p>

Middle East	South Asia	Africa
-------------	------------	--------



Jet fuel prices are up 50% in two weeks: airfares will rise quickly

- Fuel is the second largest expense for airlines (after labor)
- Jet fuel has doubled in price in 3 months, from \$1.93/gal in Dec to \$3.78 in March
- Pace of increase is just as important as magnitude for airline profitability—sharp increases reduce ability of airline to absorb increased cost
- Both DL and UA reported that increased fuel prices could cost \$400 million in Q1 alone
- US airlines no longer hedge fuel and so are more exposed than European/Asian carriers



BUT...US airlines remain bullish

- Despite fuel and geopolitical challenges, major US carriers have all reported extremely strong demand.
- AA and DL both revised their Q1 outlook *upward*, and UA expects a healthy profit.
- Delta reported 8 of its 10 highest sales days in history in Q1, including 5 in March.
- US airline bookings are up 25% over this time last year



What's the upshot for SEA?

- “**K Curve**” in airline demand expected to continue, with strong corporate and premium leisure demand—areas that have always been SEA’s strengths.
- Continued **expansion of int’l routes** as Alaska builds its global hub.
- Flattening of SEA’s growth trajectory due to **operational constraints**.
- Uncertainty of geopolitical conflicts and economic markets remain a concern for both near term and long-term.

Thank you!

Ian Sharma

sharma.i@portseattle.org



SEA

Seattle-Tacoma
International
Airport

Operated by the
Port of Seattle

FlySEA.org





SEA Airport FWC26 Update

Puget Sound Business Travel Association – March 18, 2026

Julie Collins, SEA Airport FWC26 Lead

Joie Ago, SEA Visual Communicator

FIFA World Cup 2026 - SEA Airport Mission

Provide a safe, efficient and enjoyable travel experience at SEA for fans, FIFA Clients, and teams during the FIFA World Cup tournament in 2026.



FIFA World Cup 2026 - Economic Impact

- Expecting up to 750,000 visitors (LOC estimate)
- \$929 million in economic benefit (Visit Seattle)
- Expected stay of 9 days for international travelers in US
- 9 fan zones across WA and 4 fan celebration locations in Seattle
 - Seattle Center, Waterfront Park, Pacific Place, and Victory Hall in Sodo (all along Seattle's Unity Loop)
 - Distributed model spreads economic benefits across more Seattle neighborhoods



FWC26 Coordinating Relationship

FIFA

- Leads coordination of logistics of media, VIPs, teams, and match officials

LOCAL ORGANIZING COMMITTEE (LOC) – SEA FWC26

- Non-profit coordinating regional logistics amongst agencies, including activations state-wide
- Point of contact between regional partners and FIFA

REGIONAL AGENCIES & PROVIDERS (SEA AIRPORT, SOUND TRANSIT, ETC.)



- Provide mobility and safety/security services to move fans and visitors to and from their destinations
- Coordinate regional plans to feed into LOC deliverables given to FIFA

FWC26 Seattle Matches

GROUP STAGE

6/15 12 pm PST

 **Belgium** vs.  **Egypt**



6/19 12 pm PST  

 **USA** vs.  **Australia**

6/24 12 pm PST



 **Qatar** vs.  **UEFA Path A Winner***

6/26 8 pm PST  



 **Egypt** vs.  **Iran**



ROUND OF 32

7/1 1 pm PST

 **TBD** vs.  **TBD**

ROUND OF 16

7/6 5 pm PST  

 **TBD** vs.  **TBD**

*UEFA Path A includes: Italy, Northern Ireland, Wales, & Bosnia and Herzegovina

 Cruise Day  Holiday

Teams Snapshot

Australia (AFC)

- The Socceroos are making their 6th consecutive World Cup appearance
- Last time in World Cup: 2022
- Known for massive outdoor viewing parties across Australia that go very late

Belgium (UEFA)

- The Red Devils finished 3rd at 2018 World Cup with their "Golden Generation"
- Last time in World Cup: 2022
- Consistently ranked among top teams globally

Egypt (CAF)

- African football giants – Record 7-time Africa Cup of Nations champions
- Last time in World Cup: 2018
- First African nation to play in a World Cup (1934), known for ultra culture support
- Diaspora population in WA: 4,333

Iran (AFC)

- Regular World Cup participants – this will be their 7th appearance overall
- Last time in World Cup: 2022
- Asian football power with passionate fanbase
- US Travel ban in effect will likely prevent fans from attending
- Diaspora population in WA: 10,404

Qatar (AFC)

- 2022 World Cup hosts – first Middle Eastern nation to host the tournament
- Last time in World Cup: 2022
- 2019 Asian Cup champions, continuing to develop football infrastructure

USA (CONCACAF)

- Finished 3rd in the 1930 World Cup
- Last time in World Cup: 2022
- 12th World Cup and their second on home soil since 1994

West Coast Travel

- FWC26 match schedule facilitates travel for fans to follow teams
- Airport Coordination: regional airports (especially Boeing Field) will be needed to accommodate charters and private jets
- Sensitivities around security and customs processing
- Focus on language needs (signage, know before you go" info on website & FIFA App)

FWC26 West Coast Matches Group Stage

6/12

Los Angeles
Match #1

6/13

Vancouver
Match #1

San Francisco
Match #1

6/15

Seattle
Match #1

Los Angeles
Match #2

6/16

San Francisco
Match #2

6/18

Vancouver
Match #2

Los Angeles
Match #3

6/19

Seattle
Match #2

San Francisco
Match #3

6/21

Vancouver
Match #3

Los Angeles
Match #4

6/22

San Francisco
Match #4

6/24

Vancouver
Match #4

Seattle
Match #3

6/25

San Francisco
Match #5

Los Angeles
Match #5

6/26

Vancouver
Match #5

Seattle
Match #4

FWC26 Flight Volumes

International Carriers

- 1 international carrier (Volaris) has confirmed an additional flight during FWC26 from SEA->GDL (Mexico) from 6/1-7/31
- Qatar has potential to add additional charters

Domestic Carriers

- United: additional flights between SEA – SFO for the entire summer
- American: upgauging flights from SEA – LAX
- Delta: no expected additional flights
- Alaska: no expected additional flights

Safety/Security

- Safety is the Airport's Top Priority.
- Port Police is partnering closely with all law enforcement entities and federal agencies
- FIFA Security is sharing intelligence with Local Organizing Committees and Airports
- Port is leading airport-focused exercises and participating in regional/state exercises



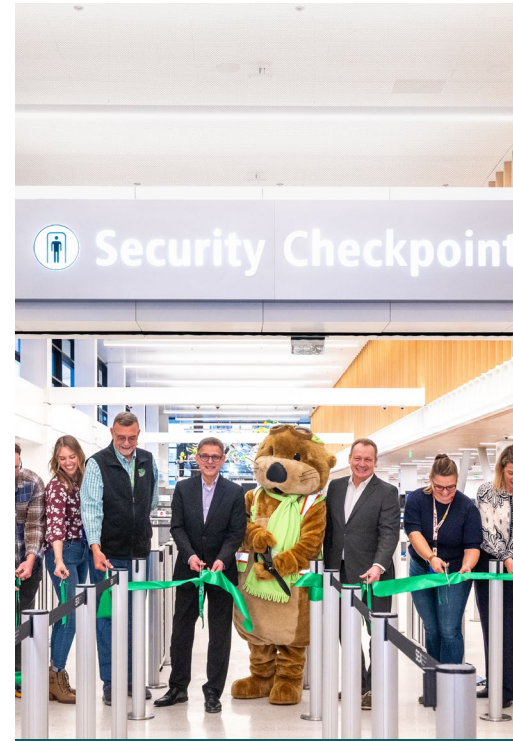
Getting the Airport Ready for the World: Upgrade SEA



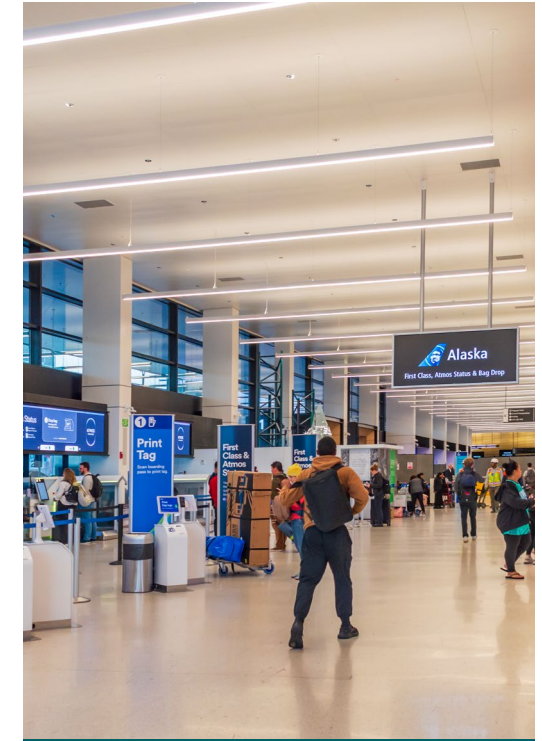
Checkpoint 1 Relocation
Opened Q2 2025



C Concourse Expansion
Opens 2026



Checkpoint 6 Dedication
Reopened 2025



SEA Gateway Project
Opening 2025-2026

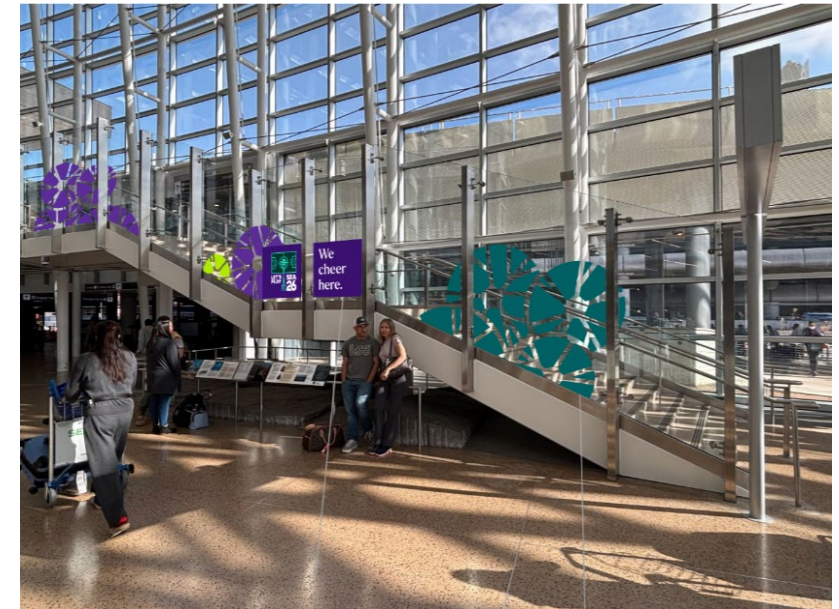
Roadway Improvements Project

Status: In Progress

Projected Finish Completion: Q2 2026



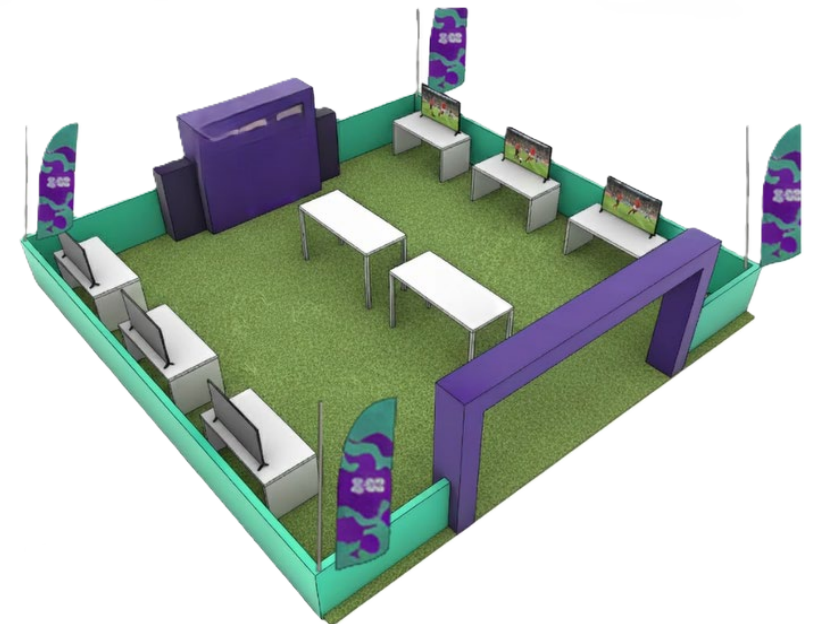
Welcome & Wayfinding Signage



Public Art with Sounders and Reign FC

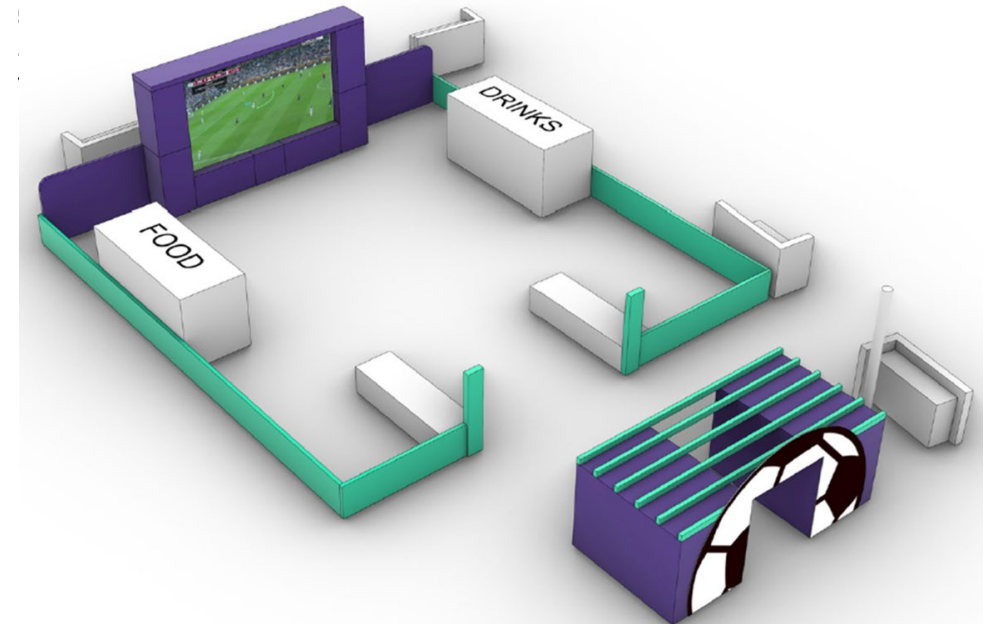
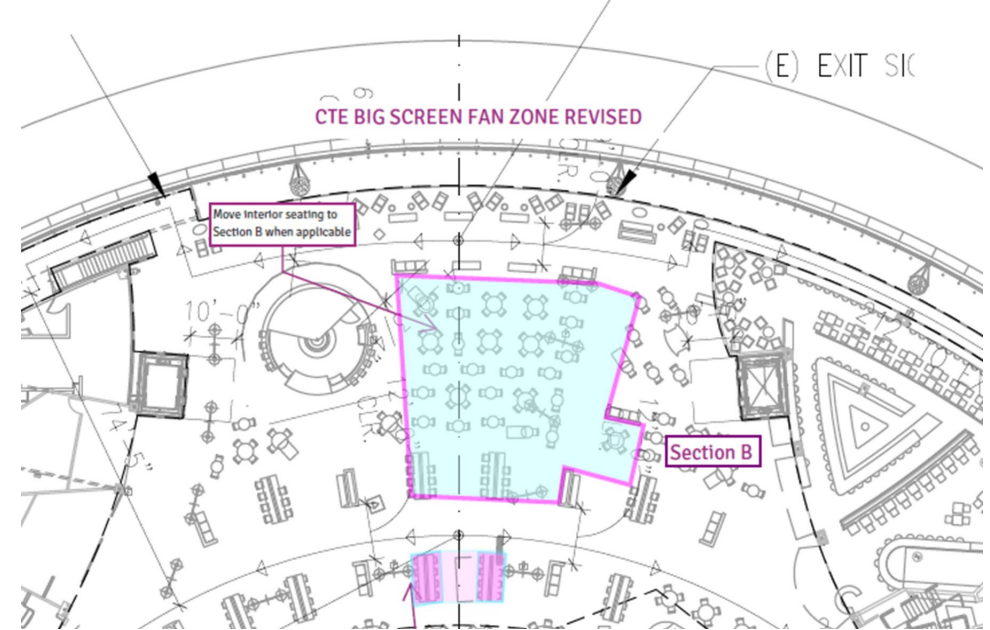


Fan Zones & Activations



Spectator "Big Screen" Fan Zone

- Location: Central Terminal
- Dates: June 11-July 19, 2026
- Sponsors: ReachTV, Coca-Cola, ADR Tenants, TBD.
- Activities to include:
 - Large screen playing the games.
 - Coke Experiential Zone with games.
 - Food tastings provided by ADR tenants.
 - Brand Ambassadors for Coke providing merchandise and beverages.



SEA Ambassadors

- Opportunity for Port employees, airport workforce, and general public to help customers at SEA from **June 11 – July 8, 2026**
- Shifts available daily from 7 am – 7 pm (Min. commitment of 3 shifts – 3 hours long); required trainings (1 hour Port Staff, 2 hours non-Port staff)
- Applications available on Port of Seattle website (<https://www.portseattle.org/SEAambassadors>)
- Uniform t-shirt, lanyard, nametag, and job aids will be provided

Contact: *Chelsea Rodriguez*
(SEAAmbassadors@portseattle.org)



Scan here to
apply and
learn more!

State of Seattle Transportation

Additional Congestion Causes

- International travel between Seattle and Vancouver
- Blue Jays vs. Mariners games July 3-5
- Match Day traffic closures in a perimeter around stadium and rideshare restricted areas

Effects:

- Visitors to stay further from I-5, I-90, other parts of Puget Sound
- Heavier public transit usage (Sounder, Link Light Rail, bus service, ferries, etc.) – large focus of SEA efforts with transit agencies
- Draft image (Right) Red lines are match day closures for regular traffic with exceptions



2026 Cruise Season

- Cruise season is April – October
- Expecting 2+ million cruise passengers
- 330 cruise calls over the 2026 season
- 53% of passengers stay overnight



Thank You. Questions?

Julie Collins | FWC26 Airport Lead
Collins.J@portseattle.org

Joie Agoo | SEA Visual Communicator
Agoo.J@portseattle.org



RESERVED PARKING AT SEA:

3-DAY RESERVED PARKING STAY (\$141) VALUE



- Stall guarantee
- Dedicated floor in SEA Garage
- Short walk to terminal
- Easy entry/exit with QR code
- No waiting for shuttle/ride

SAVE 10% ON YOUR FIRST PARKING RESERVATION

Sign up for SEA Airport parking promotions



RESERVESEA.ORG