



Seattle-Tacoma
International
Airport

Air Cargo at SEA

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SEA Seattle-Tacoma
International
Airport

Fast Facts

- Seattle-Tacoma International Airport (SEA) is owned and operated by the Port of Seattle
- SEA is the largest cargo hub airport in the Pacific Northwest
 - Primary airport for air cargo in the 5-state area
 - Ranked 21st largest in North America
 - Greater tonnage than YVR (Vancouver, BC), PDX (Portland, OR) & BFI (Seattle)
- Value of global trade commodities shipped by air through SEA exceeded \$27 billion in 2025
 - International air cargo comprises 30% of total throughput
- The major market share for air cargo at SEA is express & e-commerce (primarily domestic)
- At 2,501 acres, SEA has a very small footprint relative to activity levels
- Air cargo facilities at SEA total more than 425,000 sqft across 17 airfield buildings

Port of Seattle Century Agenda Policy Directive Update*: Adopted June 9, 2020 *Originally adopted in 2012

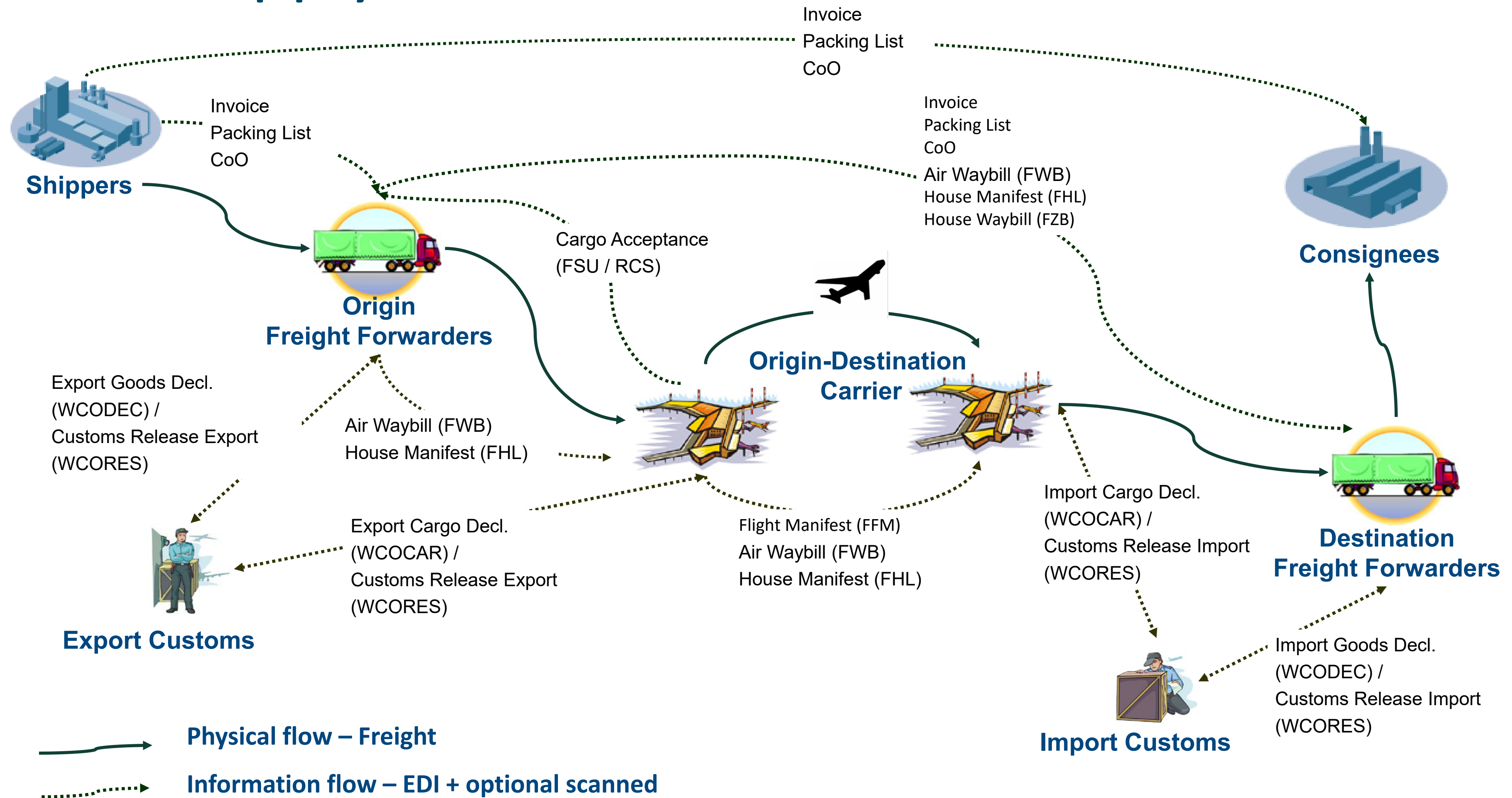
SECTION 5. Policy.

The Commission establishes the following Century Agenda goals. Each goal will guide the development of objectives and KPIs.

- A. Goal 1: Position the Puget Sound Region as a Premier International Logistics Hub –**
Through this goal the Port of Seattle will ensure it meets and supports the international trade needs of the region and keeps the Northwest Seaport Alliance competitive in the global marketplace while it prioritizes environmental sustainability and the needs of the local economy.

Objective 1: Meet the Puget Sound region's int'l trade and cargo needs in an efficient and sustainable manner

The Supply Chain Overview



Source: IATA

Why is Air Cargo at SEA?

Primary location of population density and the logistics industry in the PNW

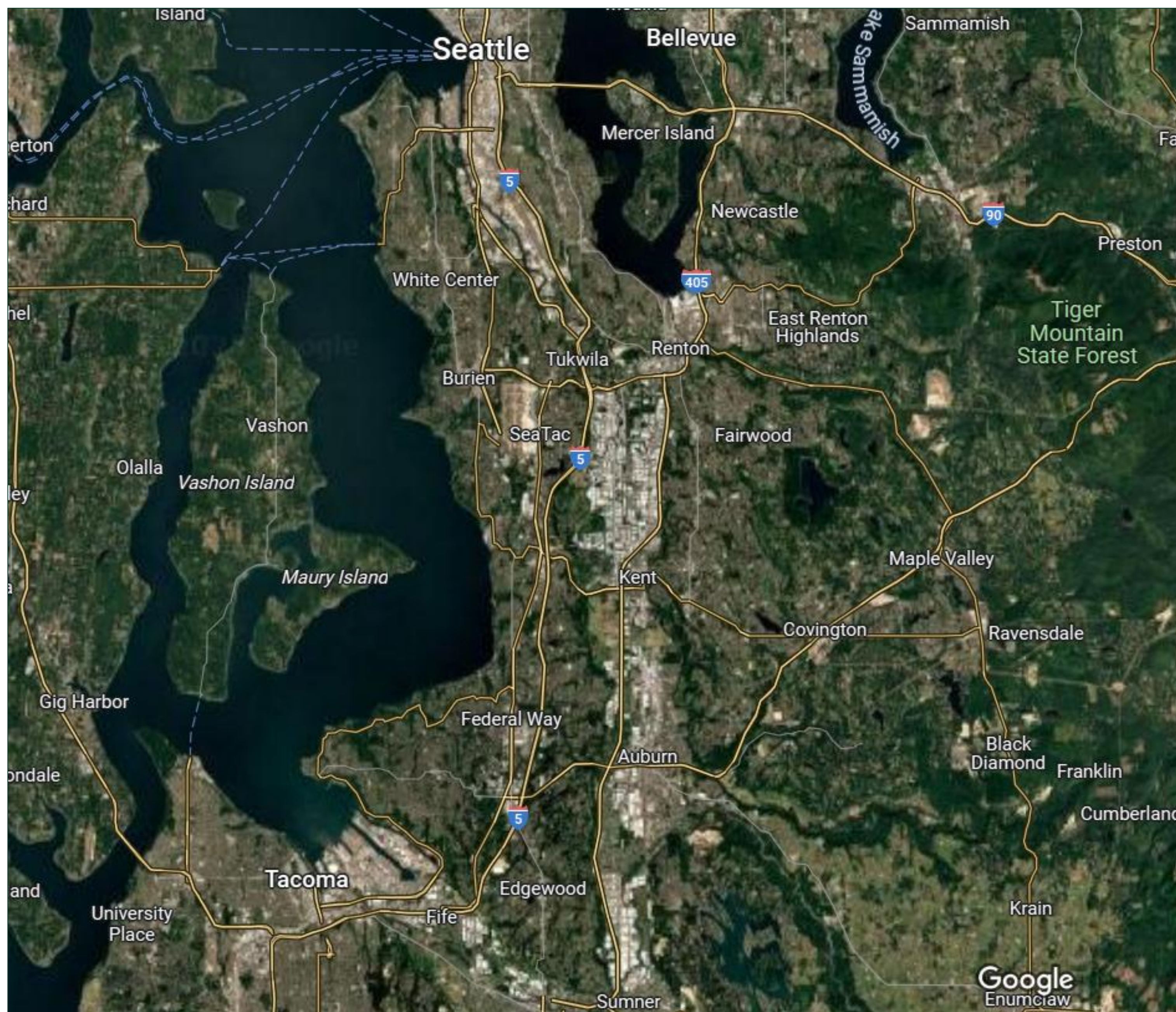
- Majority of state's residents are in the Puget Sound region
 - Consumer density supports imports and e-commerce flows; productive industries support exports
- 2nd largest warehousing and distribution logistics cluster on the west coast (Kent Valley)
 - Supported by 2 ocean ports, multiple rail lines and interstate highways, and large hub airport

Co-location of air cargo modes – freighters and belly cargo

- Belly cargo operates where passenger operations are serviced
- Cargo service providers (airport ground and cargo handlers) attract freighter operations
 - Airlines with both modes (Alaska, Korean, Asiana, EVA, Lufthansa, etc.) don't want a split station

Market dynamics – demand and supply

- Regional logistics industry players (shippers, forwarders, airlines) choose SEA
- No viable conveniently located alternatives exist
 - If not for SEA, cargo would leak to other large airports (YVR, SFO, LAX) and not WA state airport of our choosing



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Co-location of air cargo modes – dedicated freighters and passenger belly cargo

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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

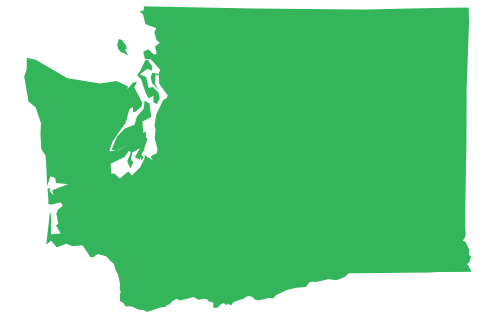
Air cargo, part of the trade and logistics supply chain, supports employment

- Industry sources estimate every 1,000 metric tons of air cargo generates 10 – 15 jobs systemwide
- For an airport equivalent to SEA that represents 4,300 - 6,500 direct jobs
- Direct airport air cargo jobs support large critical regional industry clusters such as agricultural and seafood production, manufacturing, and supply chain logistics

Total Economic Value To
Washington State

\$22.7 billion

- \$521 million raised in taxes for local/state taxes



SEA launched 6 new international services in 2025

And will launch another 6 new services in 2026



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

2025	
WESTJET	KELOWNA
Alaska	TOKYO-NARITA
SAS	COPENHAGEN
edelweiss	ZURICH
Alaska	SEOUL
LATAM	SOUTH AMERICA
2026	
Alaska	ROME
DELTA	ROME
DELTA	BARCELONA
Alaska	LONDON
Alaska	REYKJAVIK
CATHAY PACIFIC	HONG KONG

*Note: Ends January 2026





8/6/2015 6:49:11 AM Cargo 2 Light Pole 03

Boeing 747-8F

TECHNICAL SPECIFICATIONS





747-8F Main deck

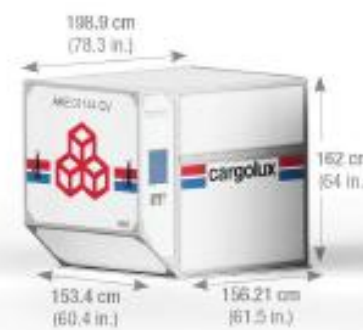
(27) 96 x 125 in. x 10 ft contoured pallets	750 ft³
244 x 317.5 x 304.5 cm	21.1 m³
(5) 96 x 125 in. x 8 ft contoured pallets	623 ft³
244 x 317.5 x 244 cm	17.6 m³
(2) 96 x 125 in. x 8 ft contoured pallets	540 ft³ + 607 ft³
244 x 317.5 x 244 cm	15.3 m³ + 17.2 m³

747-8F Lower hold

(12) 96 x 125 in. x 5 ft contoured pallets	407 ft³
244 x 317.5 x 160 cm	11.5 m³
(2) Ld-1 container	175 ft³
	496 ft³
Bulk	14.0 m³

747-8F Main deck and Lower hold total volume : 30,242 ft³ / 852 m³

AKE
MRW* : 1,588 Kg (3,500 lbs)
Volume : 4.3 m³ (153 ft³)
GOH** provisions



XYX
MRW* : 750 Kg (1,658 lbs)
Volume : 2.17 m³ (76.6 ft³)
GOH** provisions



RAP - Cool Container
MRW* : 6,033 Kg (13,337 lbs) Main Deck
4,626 Kg (10,226 lbs) Belly
Volume : 8.5 m³ (302 ft³)



AMP
MRW* : 6,804 Kg (15,000 lbs) Main Deck
5,035 Kg (11,100 lbs) Belly
Volume : 10.85 m³ (382 ft³)
GOH** provisions



PMC Belly
MRW* : 5,035 Kg (11,100 lbs) Belly
Volume : up to 10.85 m³ (382 ft³)



AMA
MRW* : 6,804 Kg (15,000 lbs)
Volume : 15.18 m³ (536 ft³)
GOH** provisions



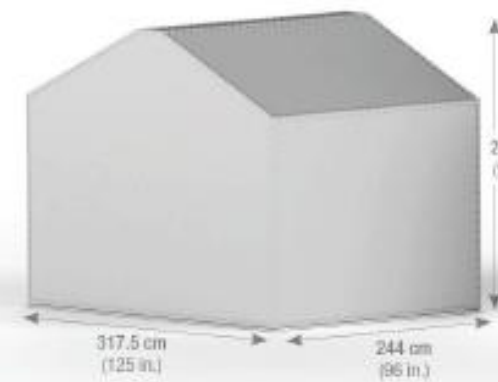
PMC Q7
MRW* : 6,804 Kg (15,000 lbs) Main Deck
Volume : up to 19.35 m³ (683 ft³)



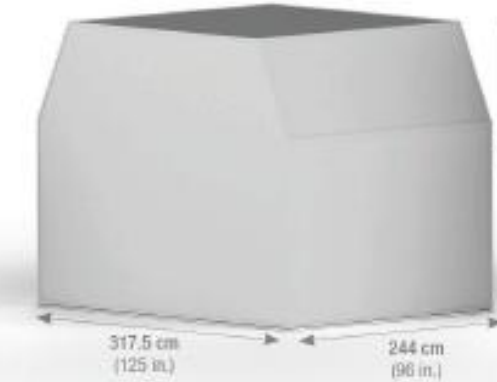
DOUBLE CARRACK



P1A
MRW* : 3,701 Kg (8,159 lbs)
Volume : 15.00 m³ (540 ft³)



P2A
MRW* : 3,701 Kg (8,159 lbs)
Volume : 17.00 m³ (607 ft³)



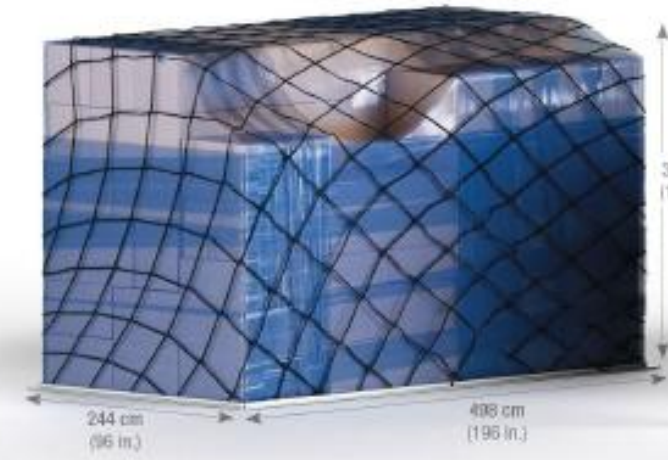
AMD
MRW* : 6,804 Kg (15,000 lbs)
Volume : 19.35 m³ (683 ft³)



HMC (Collapsible Horse Stall)
MRW* : 6,804 Kg (15,000 lbs)
Volume : 10.85 m³ (383 ft³)



PRF - 16 Ft Pallet
MRW* : 11,340 Kg (25,000 lbs)
23,700 Kg (53,317 lbs) with additional restraints on the aircraft
Volume : 30.3 m³ (1,070 ft³)



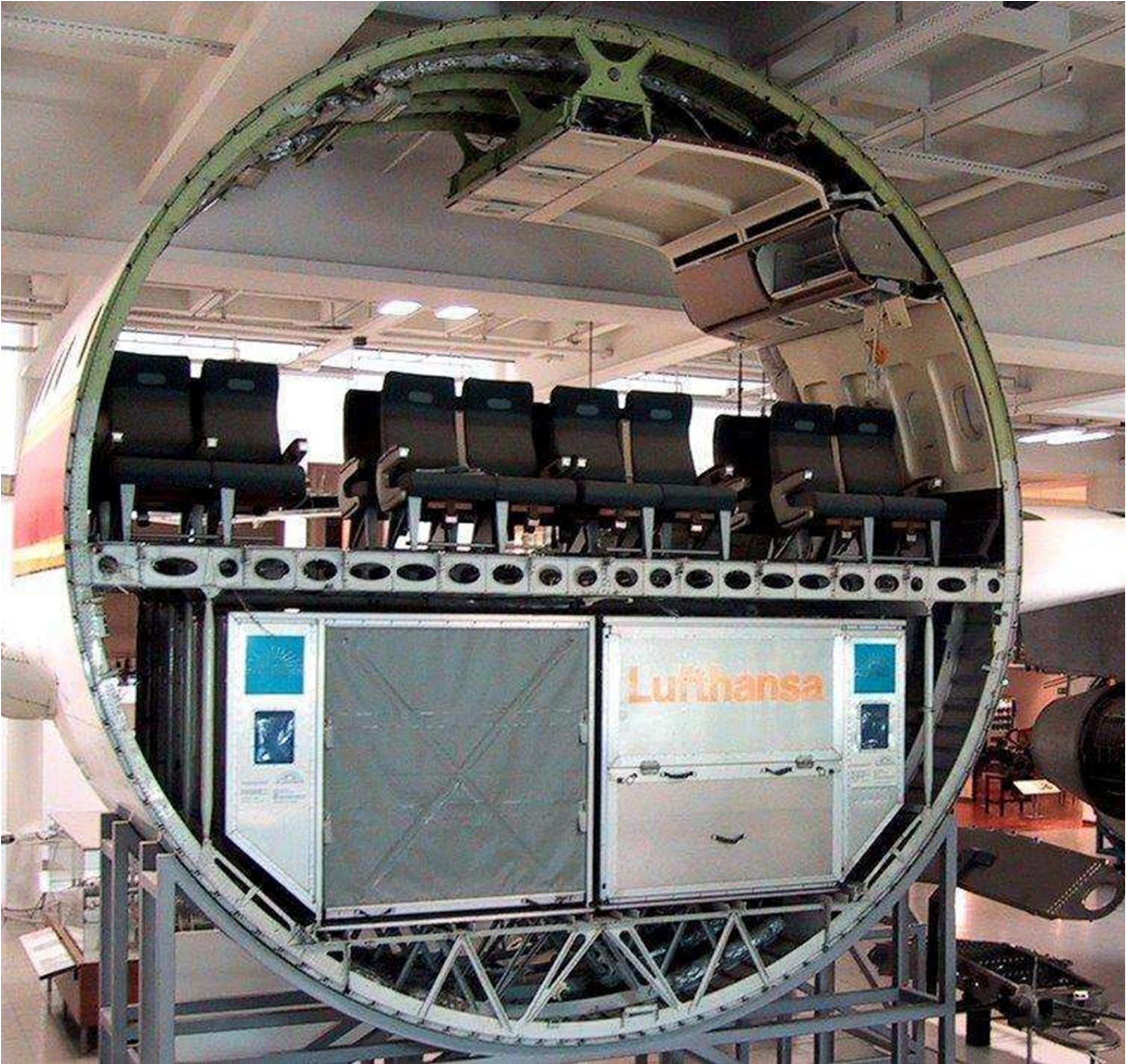
PGF - 20 Ft Pallet
MRW* : 11,340 Kg (25,000 lbs)
28,800 Kg (63,490 lbs) with additional restraints on the aircraft
Volume : 36.8 m³ (1,303 ft³)











Air Cargo Statistics

Airline reported data

- Data is reported monthly by airlines in metric tons
 - Enplaned/deplaned, domestic/international trade lanes
 - Reports indicate whether freight carried by belly or freighter
- In 2025, 35% of *all cargo* flew in the bellies of passenger aircraft; 65% traveled by freighter
 - The belly ratio was historically higher (close to 40% in 2016) and reached a low of 22% in 2020
- In 2025, 73% of *international cargo* flew in the bellies of passenger aircraft; 27% traveled by freighter
 - International freighter tonnage decreased 13% in 2025, as belly tonnage surged by 27%
 - 86% of international imports in 2025 were carried as belly freight
- International air cargo trade flows are heavily reliant on belly capacity
 - Passenger trends dictate belly capacity, which has increased with the launch of new passenger services
 - Belly capacity at risk when passenger demand declines or services are curtailed
- Airline reported data is not very informative about WA state trade partners

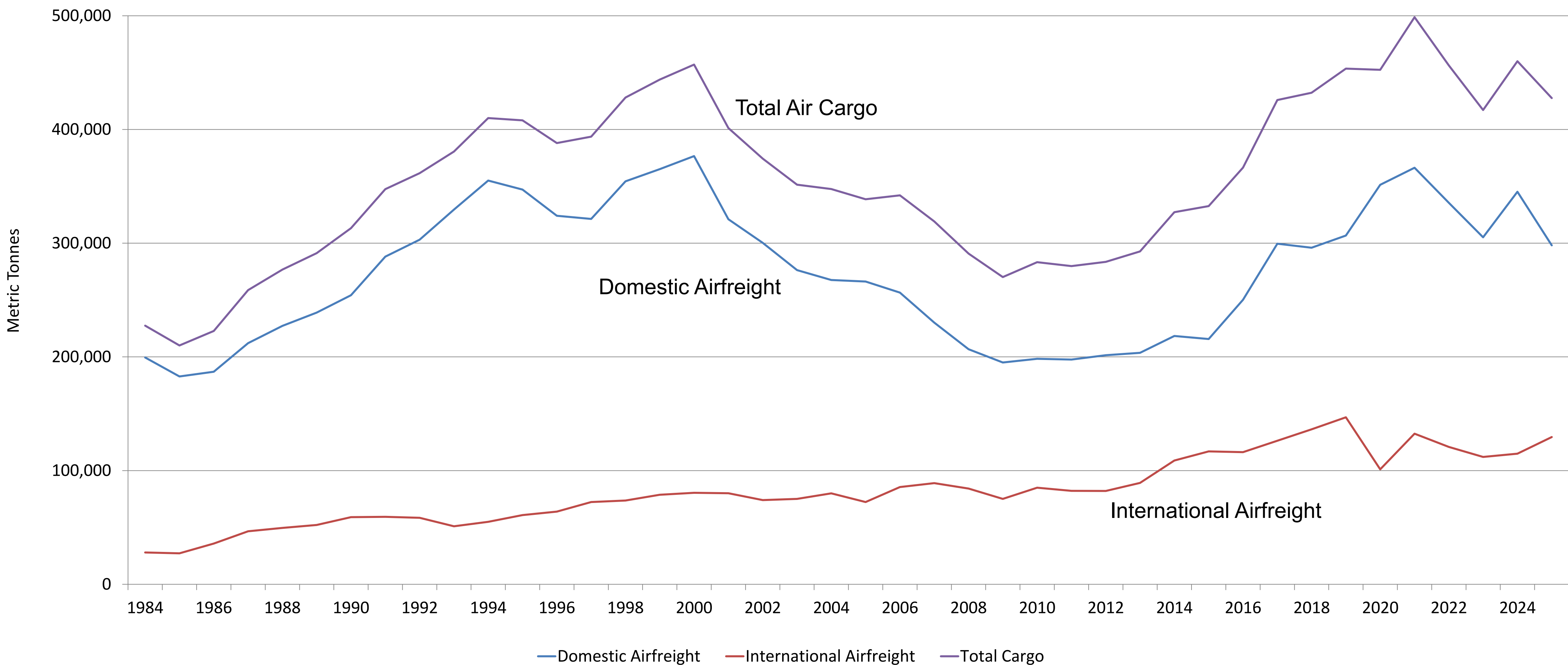
Airline Reported Cargo Statistics at SEA

Total Air Cargo		
2025	427,606 MT	-7.1%
2024	460,065 MT	+10.3%
2023	417,124 MT	-8.6%
2022	456,289 MT	-8.5%
2021	498,741 MT	+10.2%
2020	452,496 MT	-0.2%
2019	453,547 MT	

Domestic Air Cargo		
2025	298,141 MT	-13.6%
2024	345,183 MT	+13.1%
2023	305,141 MT	-9.1%
2022	335,516 MT	-8.4%
2021	366,312 MT	+4.3%
2020	351,339 MT	+14.6%
2019	306,669 MT	

International Air Cargo		
2025	129,465 MT	+12.7%
2024	114,881 MT	+2.6%
2023	111,983 MT	-7.3%
2022	120,777 MT	-8.8%
2021	132,428 MT	+30.9%
2020	101,157 MT	-31.1%
2019	146,879 MT	

Historic Air Cargo at SEA



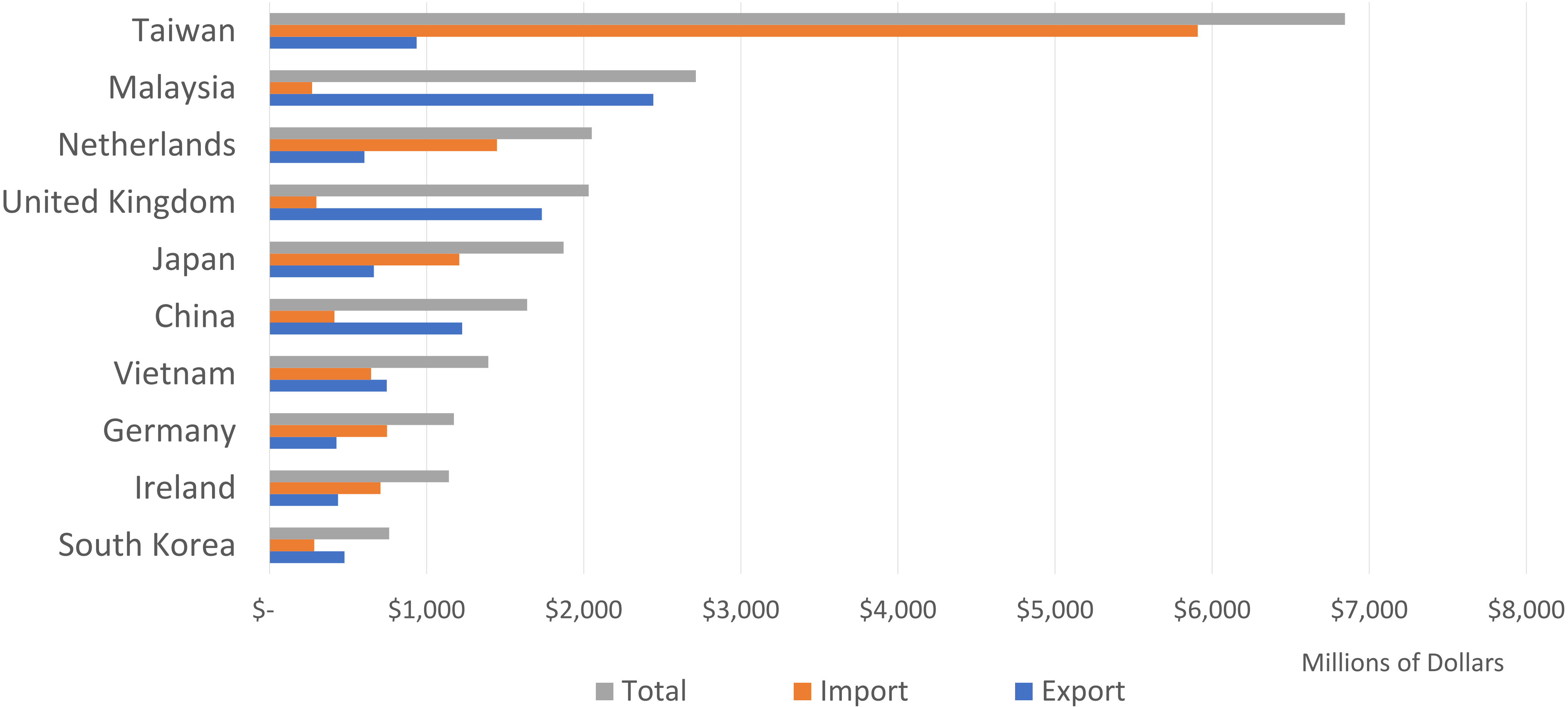
Air Cargo Statistics

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
- Data does not indicate how cargo is flown (belly or freighter) or by which airline
 - 2025 international trade value was \$27.5 billion – an increase of 4.5% over 2024
 - By value 52% imports (grew +35% vs 2024) / 48% exports (shrank -16% vs 2024)
 - By weight 49% imports (grew +24% over 2024) / 51% exports (shrank -4% over 2024)
- Import taxes should in theory depress import demand
 - Tariff uncertainty fueled initial surge in demand, augmented by capacity growth at SEA
- Retaliatory tariffs threaten access to global markets hurting exporters
- De minimis duty free exemption eliminated

2025 Air Cargo International Trade Through SEA

Top Washington State Global Trade Partners





SEA Air Cargo Facilities

- 17 Facilities, 130+ acres in the Commercial Area of SEA

SEA Air Cargo Facilities

- Various build times (e.g. 1974 to 2001)
- Unique designs specific to the builder (Western Airlines, United Airlines, Airport Drayage, UPS, Northwest Airlines, etc.)
- Long term Ground leases, property then returned to the Port
 - No Capital Investment in the last ten years of each lease
- Since 2018, Expense/Repair spending in excess of \$7 million
- Energy Efficiency Study – 2019
- Fire Protection Engineering Study - 2021
- Capital Retrofit Project (5 buildings, now just one) starting - 2027

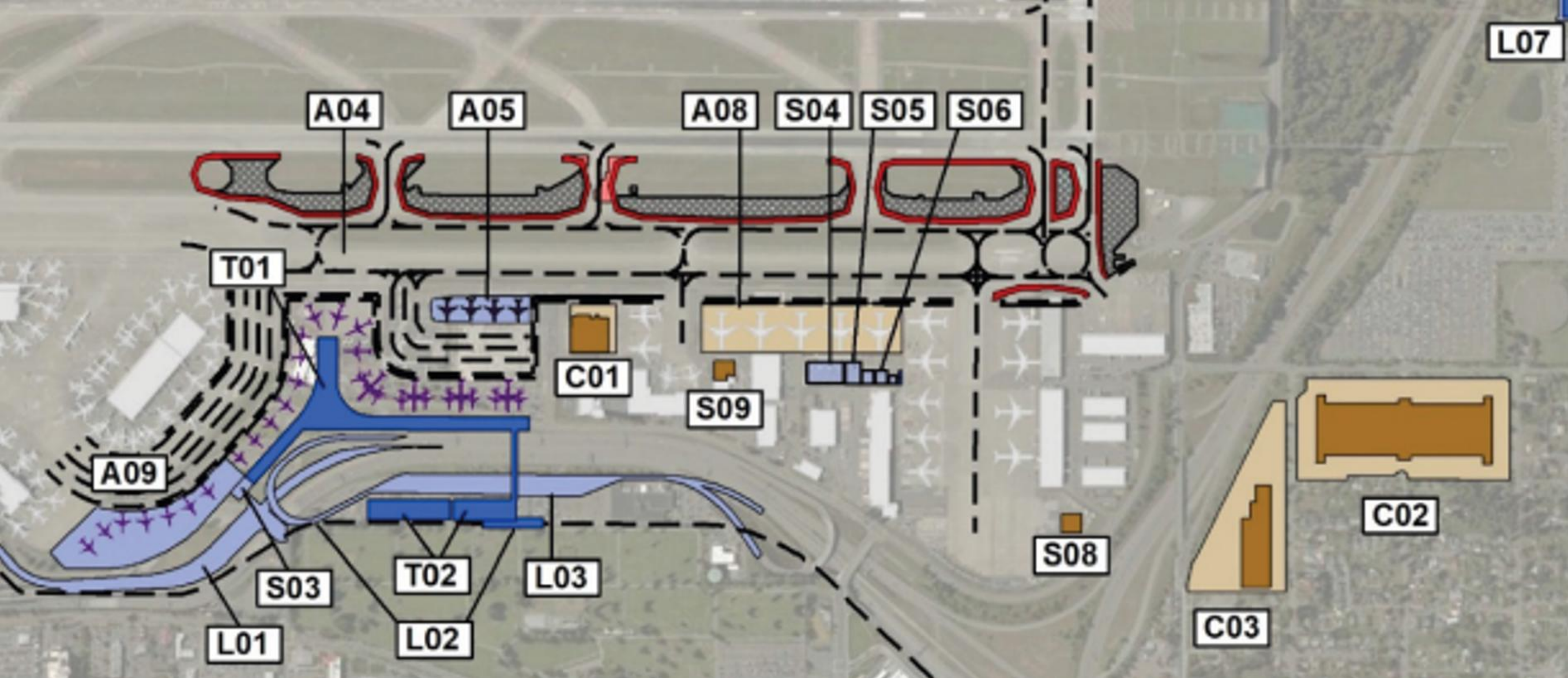
SEA Air Cargo Facilities

- Risk Challenges
 - Perception (Cargo is dirty, no one wants it)
 - Cost, passenger enplanement is allocated to the general fund
 - Age of facilities, damage by tenants
 - Actual capacity constraints
- What happens if?
 - Cyberattack (August 24, 2024)
 - HVAC failures (All through the summer)
 - Power failures
- Managing that risk
 - Planning & Coordination
 - Relationships
 - COOPs
 - Sustainable Airport Master Plan





Sustainable Airport Master Plan



Sustainable Airport Master Plan – Cargo Near Term Projects

Air Cargo at SEA



Air Cargo at SEA



Questions?



Seattle-Tacoma
International
Airport

Operated by the
Port of Seattle

[FlySEA.org](https://flysea.org)



Thank You!