



HARTSFIELD-JACKSON ATLANTA INTERNATIONAL AIRPORT (ATL)

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AIRPORT DIRECTOR
AIR SERVICE DEVELOPMENT

AGENDA

- **ATL Airport Philosophy**
- **Airport Overview and Priorities**
- **Cargo Operations**
 - **Statistics**
 - **Airlines**
 - **Ground transit**
- **What's on the Horizon**



ATL AIRPORT PHILOSOPHY

*An airport is a community's
chief economic development
tool
for the creation of jobs and the
growth of wealth for its
residents.*



ATL OVERVIEW

104+ Million

Total Passengers in 2016
World's Most Traveled Airport

107+ Million

Projected pax growth for 2017

2,500+

Flights per Day
World's Busiest Airport

**150+ Domestic Destinations 70+
International Destinations**
World's Most Traveled Airport

648,000+

**Metric Tons of Cargo in 2016 Top
12 among U.S. Airports for cargo**

667,000+

Projected cargo volumes for 2017

+/- \$1 billion

Combined Annual Operating & Capital Budget



ATL & THE SOUTHEASTERN US

ATL:

- #2 general cargo gateway to the southeastern US
- Scheduled freighter service by 17 operators to/from the US and Canada, Far East, Europe, the Middle East and Latin America
- Major cargo feed opportunities to 150+ US domestic destinations and over 70 international destinations

Southeastern US:

- Equivalent to the world's 4th largest economy, accounts for about 20% of total US air imports and exports
- ATL's core catchment area is one of the most important automotive and aerospace manufacturing centers in the US
- Major center for bioscience and pharmaceutical manufacturing, and e-commerce fulfillment & distribution



DIRECT SERVICE IMPACT ON GLOBAL GDP

AIRPORT	SHARE OF GLOBAL GDP VIA NONSTOP SERVICE
AMS*	26.5%
JFK	23.5%
ATL	22.4%
ORD	22.0%
SFO	20.8%
IAH	19.1%
MIA	17.5%



AIRPORT PRIORITIES

- 1. Cargo Development**
A tool for job creation
- 2. “World’s Most Traveled Airport” ranking**
Build air service
- 3. Guest Experience**
Nurture an environment where exceeding customer expectations is the norm and not the exception
- 4. Resource Restructure and Development**
Greater leverage our best asset – our personnel
- 5. Revenue Generation**
Implement non-aeronautical revenue initiatives
- 6. Government and Community Partnerships**
Strengthen alliances with local, state and federal entities and surrounding areas



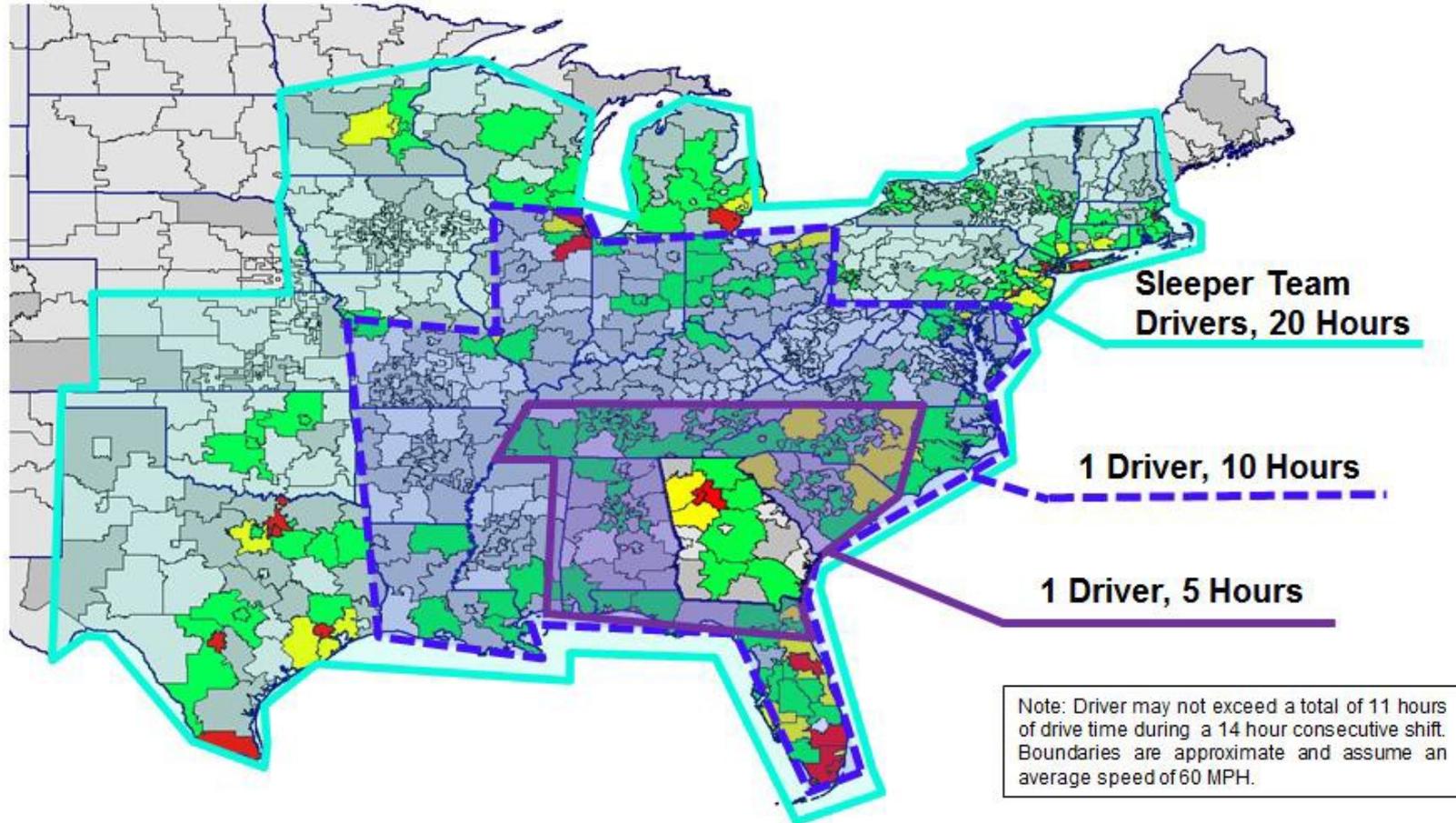
CARGO OPERATIONS: STATISTICS

Air cargo activities account for more than 9,000 Airport-based jobs, 27,000 jobs in the region and \$6.7 billion in business revenue.

CARGO (metric tons)		Variance (%)
YEAR	TONNAGE	
2010	659,129	+17.05%
2011	663,162	+0.61%
2012	654,013	-1.38%
2013	616,365	-5.75%
2014	601,269	-2.45%
2015	626,000	+4.15%
2016	648,000	+3.51%



Cargo Operations: Ground Transit



ATL CATCHMENT AREA: AUTOMOBILE

The southeast is one of the most important automotive manufacturing centers in the United States . . .



ATL CATCHMENT AREA: AEROSPACE

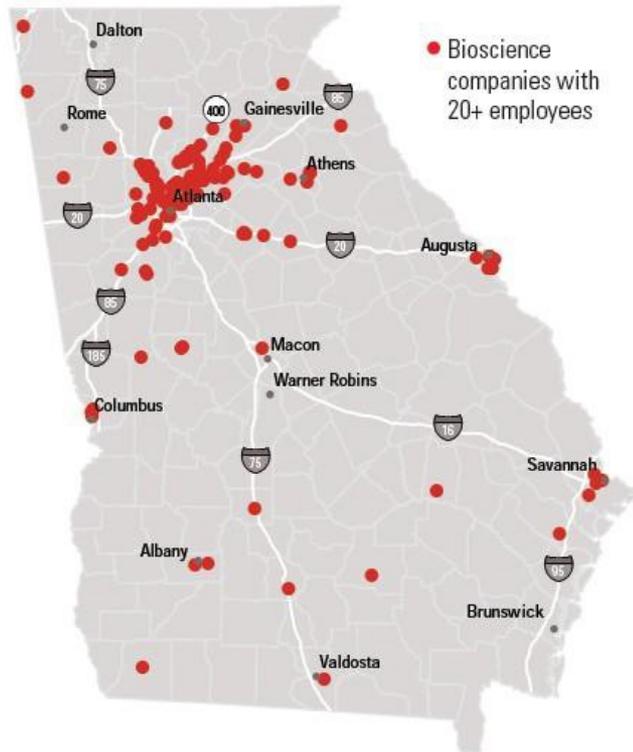
... as well as a major center for aerospace production, including Boeing 787, Airbus A320 family, Lockheed-Martin C-130, Gulfstream and HondaJet assembly facilities



ATL CATCHMENT AREA: PHARMA

Georgia is a significant center for bioscience and pharmaceutical manufacturing with 570 facilities employing nearly 24,000 people.

Location of Bioscience Companies



Top Bioscience Employers

Company / Organizational	Employment
U.S. Centers for Disease Control & Prevention	8,539
Baxalta (formerly Baxter International) (fully operational in 2018)	1,500
Meril Ltd.	1,171
Alcon Laboratories	1,100
Quest Diagnostics Inc.	1,093
SNF Inc.	1,000
Halyard Health Inc. (formerly Kimberly-Clark Health Care)	700
Covidien	580
Quintiles Laboratories Ltd.	575
Cancer Treatment Centers of America	570
LabCorp	548
C.R. Bard Inc.	530
American Red Cross/SE Blood Services	500
Ethicon Inc.	500

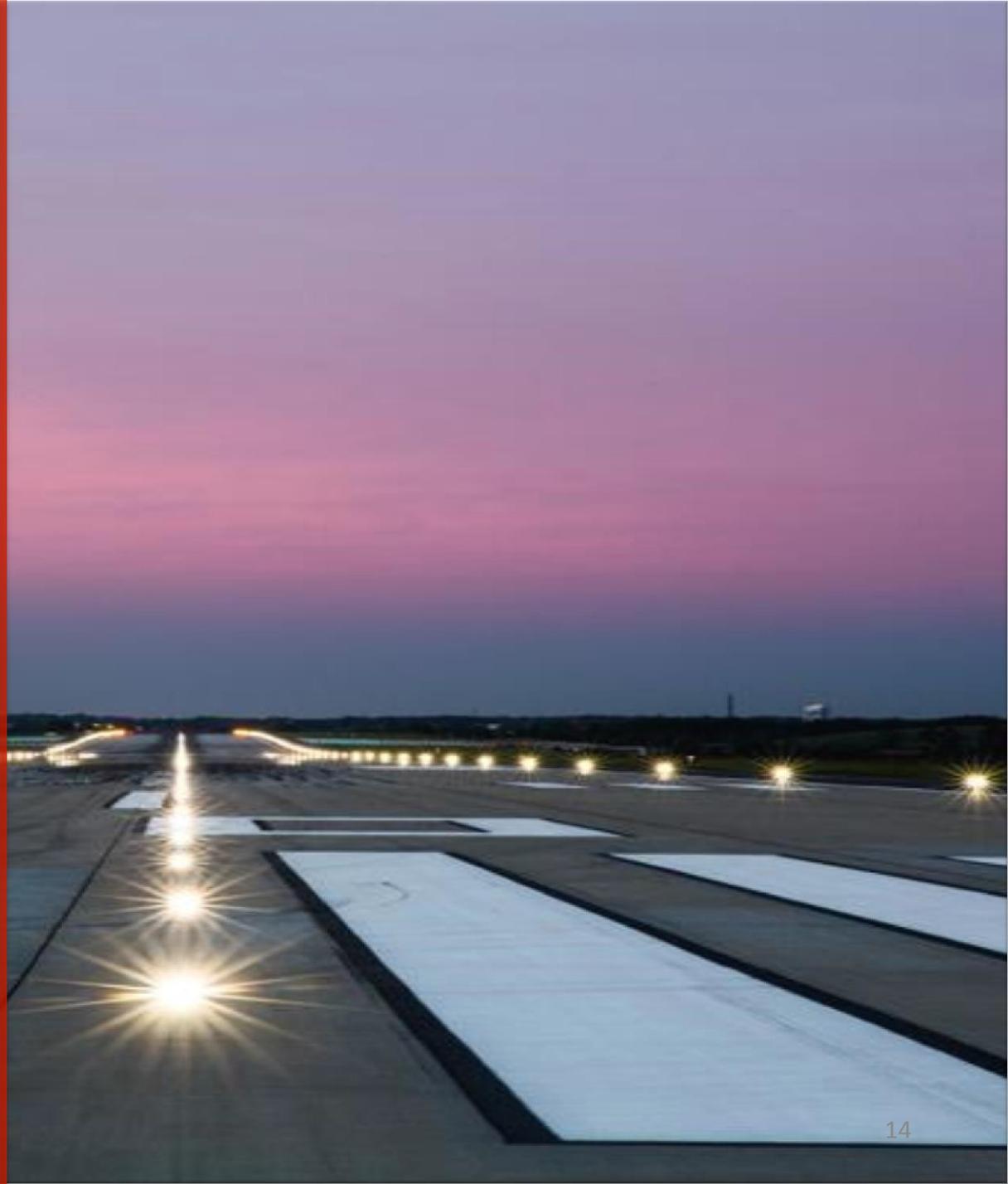
WHAT'S ON THE HORIZON: CARGO OBJECTIVE

- In 2017, ATL forecasts at least a 3% increase in cargo volume.
- 1.7 million metric tons within the next 5 to 10 years
- 1.7 million square feet of total warehouse space to accommodate anticipated growth
- Ultimately, ATL wants to grow cargo to 1.7 million tons by 2026
- ATL NEXT \$200 million allocation for cargo development



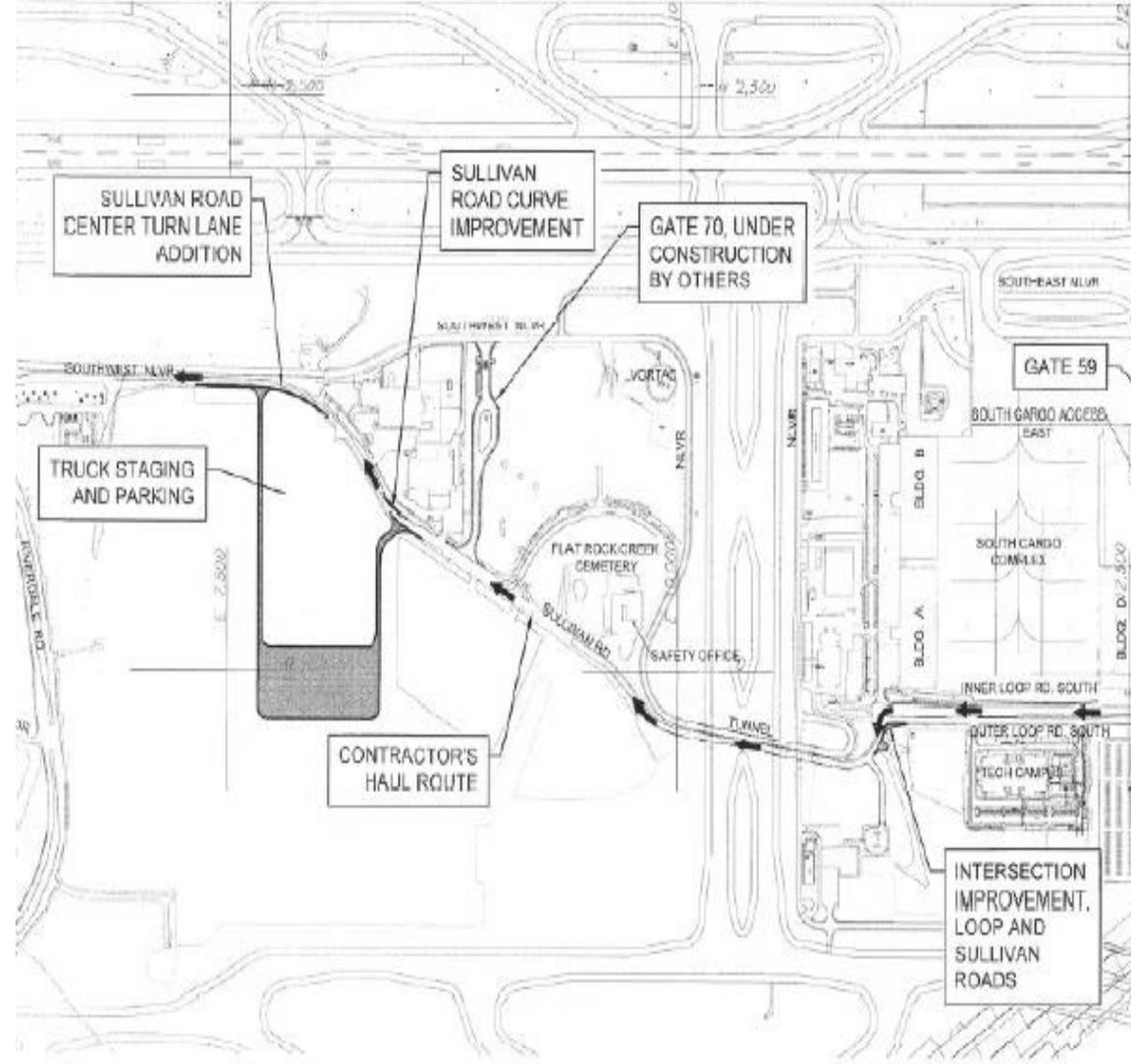
WHAT'S ON THE HORIZON: CARGO PRIORITIES

- **Air service Incentive Program (ASIP)**
- **New 120,000-square-foot warehouse**
- **New refrigeration and fumigation facilities**



ATL TRUCKPASS

- A secured 21-acre staging lot with 40 spaces and check-in booth.
- Assigned matching of trucks with available docks.
- A computerized system using individual dock sensors with internal alerts (red and green lights to indicate availability).
- Communication to ensure orderly pickup and delivery.



ATL TRUCKPASS STATISTICS

- Start Date: 03/01/2017
- Ave. daily truck movements: 292
- Ave. monthly truck movements: 8,983
- Avg. wait times (Assigned time to arrival at dock):
13.9 Minutes
- Initial Impact: Achieving operational efficiency and growth
- Lessons learnt:
Anticipate growth as a result of improved efficiency





Q&A