

# SFO Future Development Program

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San Francisco Chamber of Commerce  
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# San Francisco & SFO Airport

## San Francisco :

- **SF Guiding principles** : Service, Accountability & Change.
- **SF Vision** : A world-class San Francisco that delivers for everyone who lives, works and visits the City.
- **SF Mission Statement** : To provide exceptional core city services that enable every San Franciscan to live safe, healthy and productive lives.

## First Year Priorities – Revitalize the Economy

- **Objective 1** Reclaim top destinations for domestic and international travel.
- **Objective 2** Revitalize Downtown.
- **Objective 3** Cultivate a vibrant and an only-in-SF cultural and civic experience.

## SFO Airport :

- **SFO Vision** : Inspiring the Extraordinary
- **SFO Mission** : Delivering an airport experience where people and our planet come first.

## SFO Ignite Business Innovation & Outstanding Guest Experience Goals :

- **Objective 2.2** Deliver the best-in-class facilities, programs, and services to attain global distinction and prominent recognition in the aviation, arts and culture, and hospitality industries.
- **Objective 5.1** Establish enterprise frameworks to enable innovations and stimulate new business opportunities.
- **Objective 5.2** Increase Non-airline Revenue
- **Objective 5.3** Acquire off-airport property to diversify revenue and promote growth.

# Heathy Trends : 2024 Operations Numbers

**51.3M**

Total Passengers

+9.0% YoY

**25.5M Enplanements**

+8.9% YoY

**25.6M Deplanements**

+9.0% YoY

**0.1M Thru / Transit**

+10.7 % YoY



**178.2k**

Aircraft Landings

+6.4% YoY

**175.5k Passenger Landings**

+6.5% YoY

**2.7k Cargo Landings**

+0.4% YoY



**535.4k**

Cargo Tonnage  
(Metric Tons)

+17.9% YoY

**197.7k Domestic Tonnage**

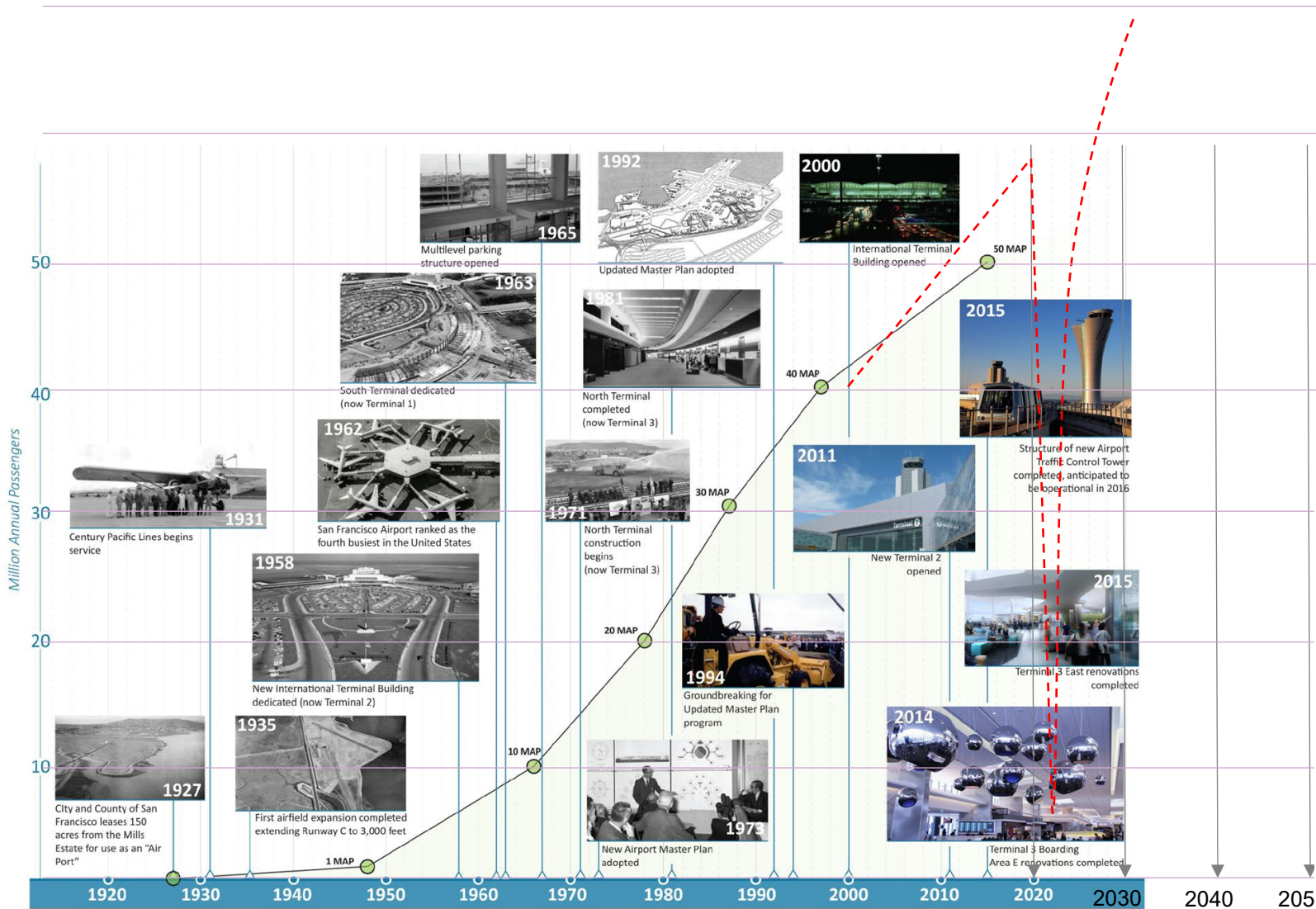
+8.1% YoY

**337.7k International Tonnage**

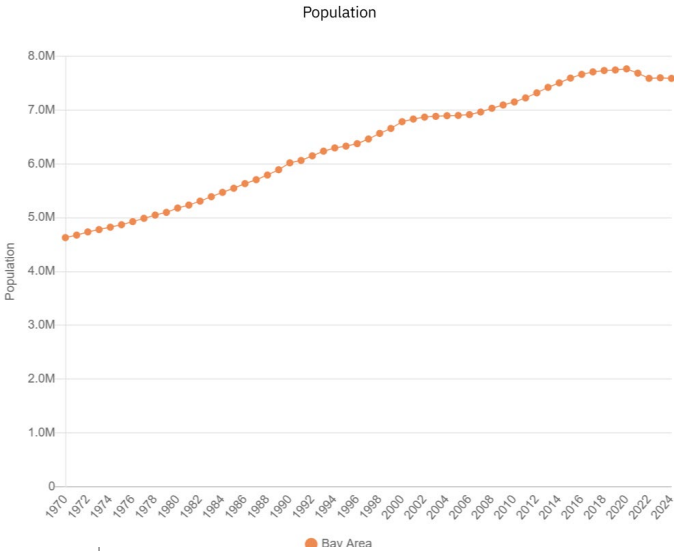
+24.5% YoY



# Healthy Trends



Historical Trend for Population



Historical Trend for Unemployment Rate



# Heathy Trends : Praise & Performance

## North America Performance:

- **12<sup>th</sup> Busiest U.S. Airport (2023)**
- **Top Large U.S. Airport (2022):** The Wall Street Journal ranked SFO as the top large U.S. airport based on factors like on-time performance, security checkpoint wait times, and customer satisfaction.
- **Best Airport in North America (2022 & 2024):** SFO was named the Best Airport in North America by Airports Council International (ACI) for customer experience and by Business Traveler Magazine.
- **One of the top 10 Best Large U.S. Airports (2023):** The Wall Street Journal included SFO in its list of the 10 Best Large U.S. Airports for 2023.

## Economic Performance:

- **Bay Area's Busiest Airport**
- **\$6.1B Business Revenue** (FY2020/21).
- **28,000 on-airport jobs** (FY2020/21) with estimates of double that amount for off-airport jobs.

## Global Performance:

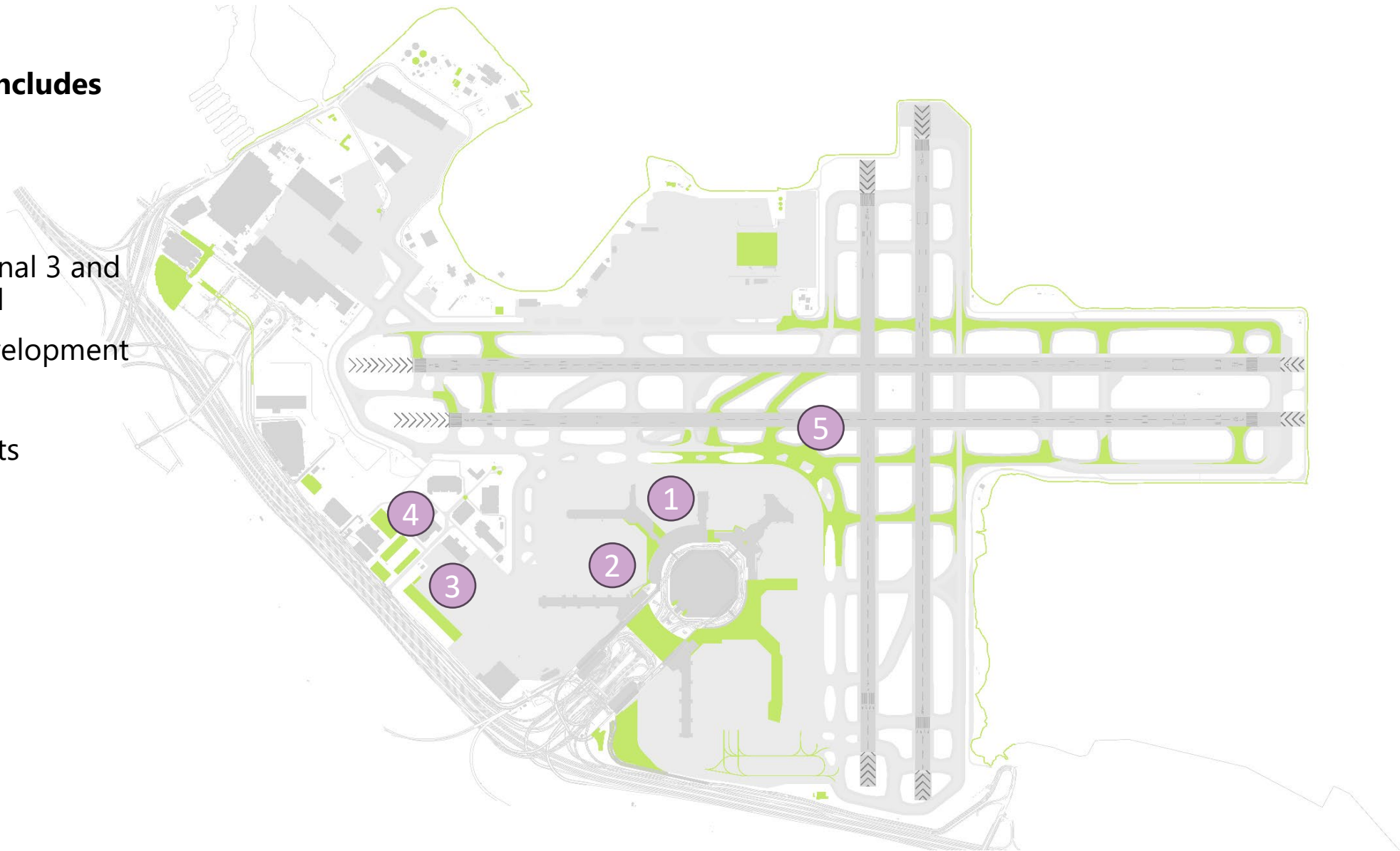
- **29<sup>th</sup> Busiest Global Airport (2023)**
- **Highly Ranked for Passenger Experience:** SFO's commitment to an exceptional experience for travelers, community and sustainability initiatives



# Current Major Projects

**Capital Program \$11B Includes  
but not limited to :**

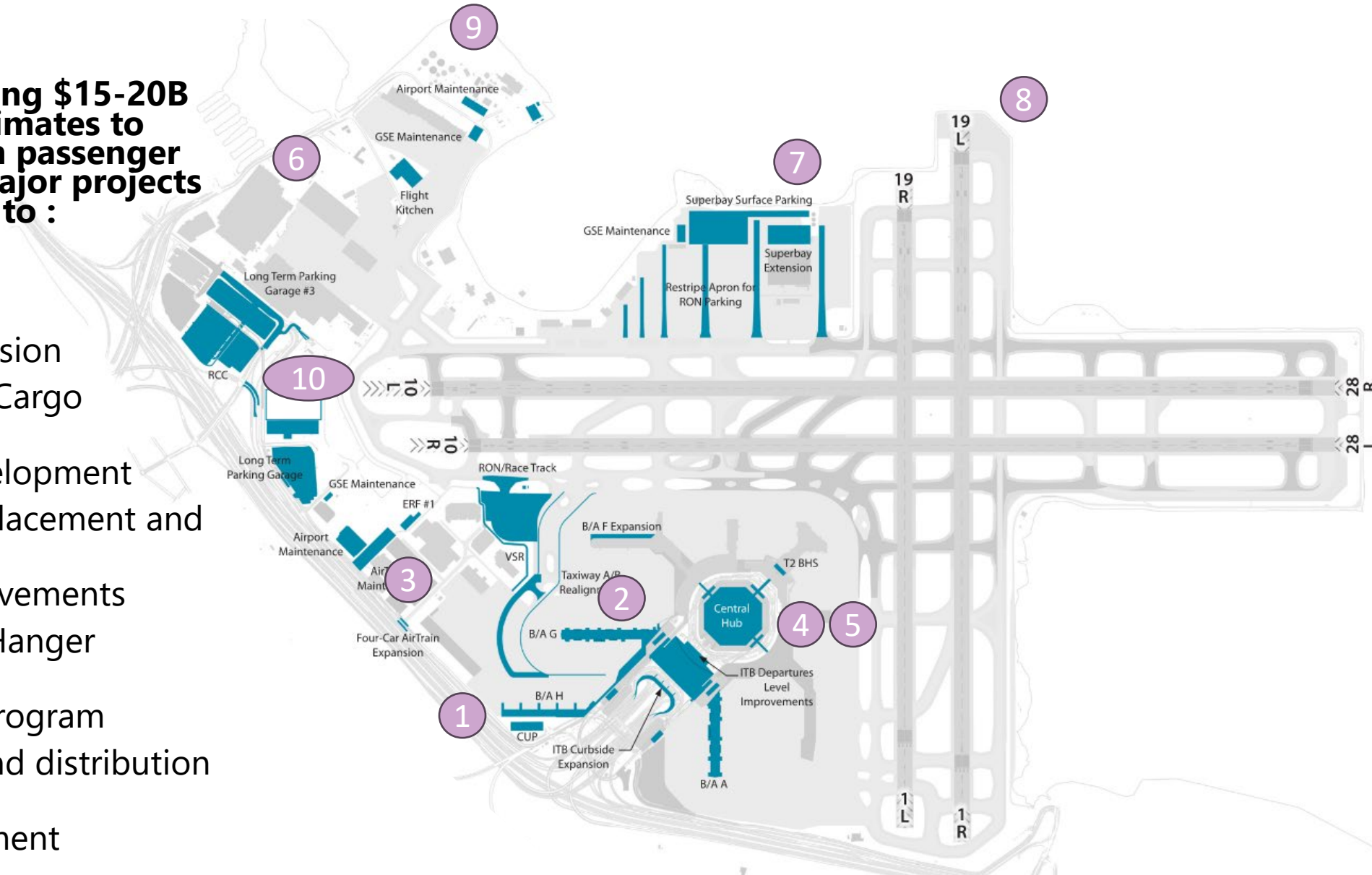
1. Terminal 3 West
2. Tower between Terminal 3 and International Terminal
3. West Field Cargo Development
4. West Field Garage
5. Runway Improvements



## Future Major Projects

**Capital Program exceeding \$15-20B according to current estimates to accommodate 71 million passenger annually. Some of the major projects includes but not limited to :**

1. Boarding Area H
2. Boarding Area F Expansion
3. Continued West Field Cargo Development
4. Central Garage Redevelopment
5. Domestic roadway replacement and expansion
6. Catering Facility improvements
7. Aircraft Maintenance Hanger expansion
8. Shoreline Protection Program
9. Electrical substation and distribution improvements
10. Rental Car Redevelopment



# Future Projects : Boarding Area Developments

## Securing Airport's Future:

1. Provide adequate international aircraft terminal gates
2. Provide efficiency of operations for domestic gates
3. Avoid congestion on taxiways and remote aircraft parking positions
4. Improve international passenger experience



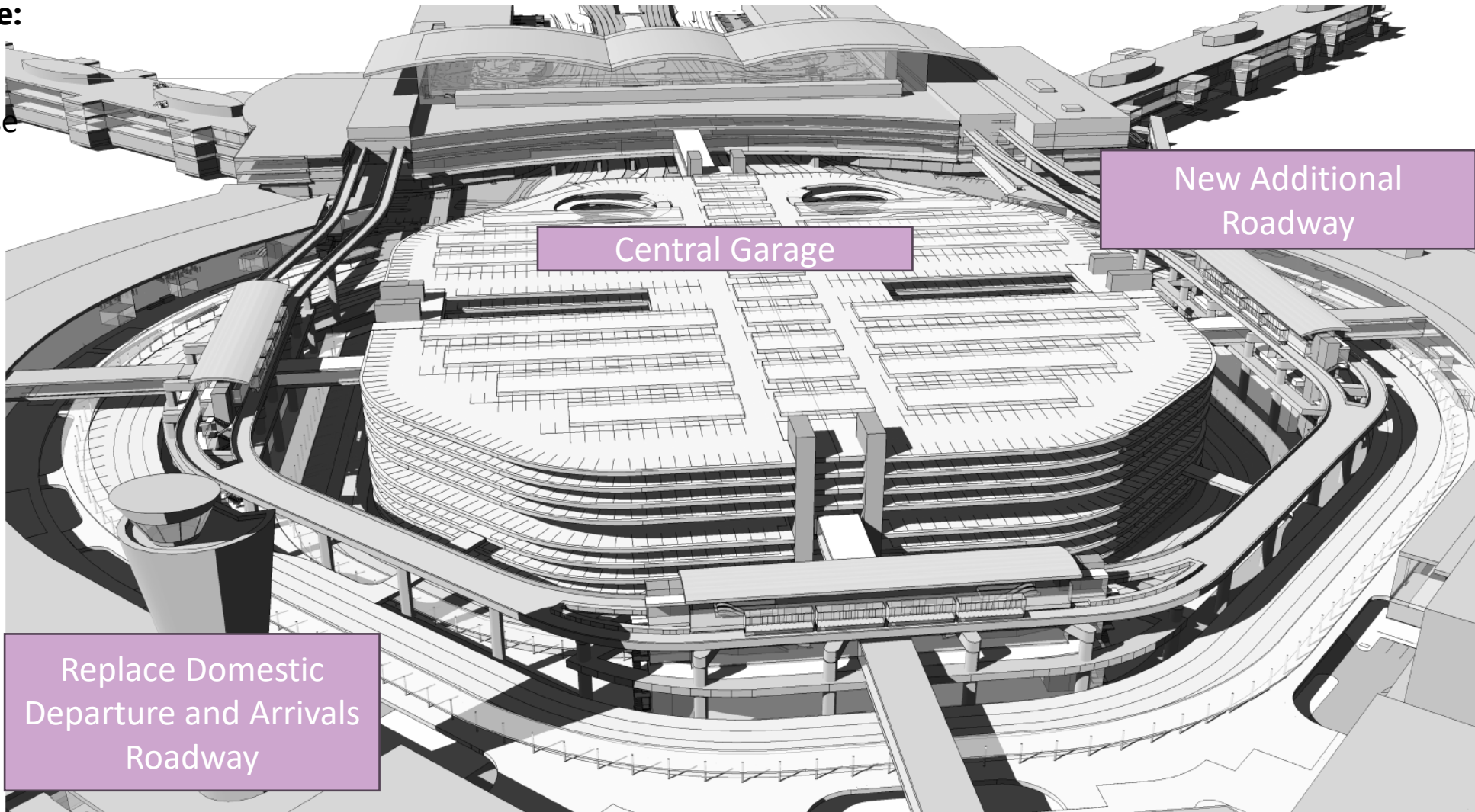
Boarding Area H



# Future Projects : Central Garage & Roadway Development

## Securing Airport's Future:

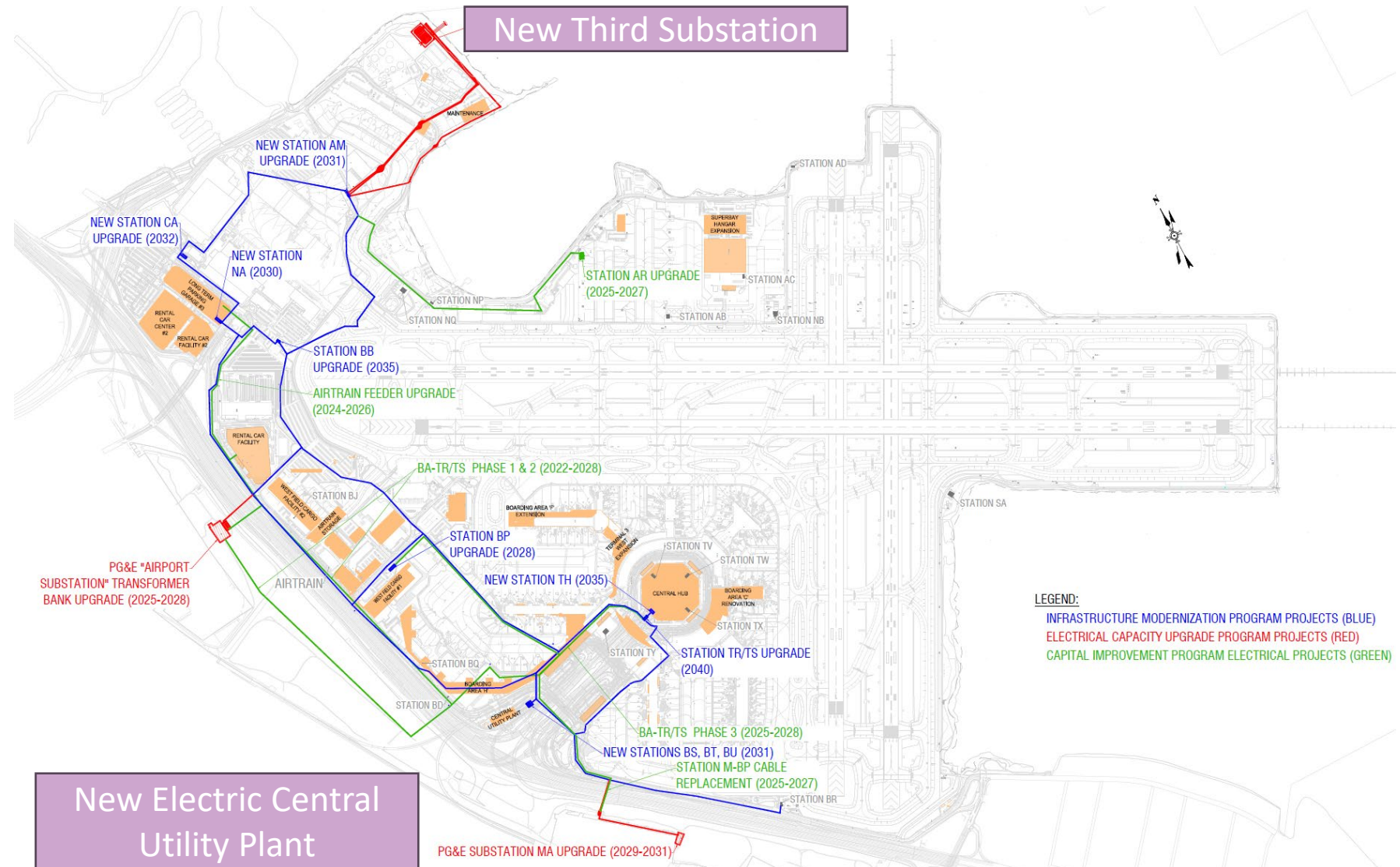
1. Provide adequate close in parking for passengers
2. Avoid congestion on domestic roadways
3. Upgrade AirTrain stations
4. Improve passenger curbside experience



## Future Projects : Electrical Utilities Development

## Securing Airport's Future:

1. Provide adequate power for long-term airport stability
2. Providing growth and redundancy for electrification demand on campus
3. Renewing campus wide electrical network

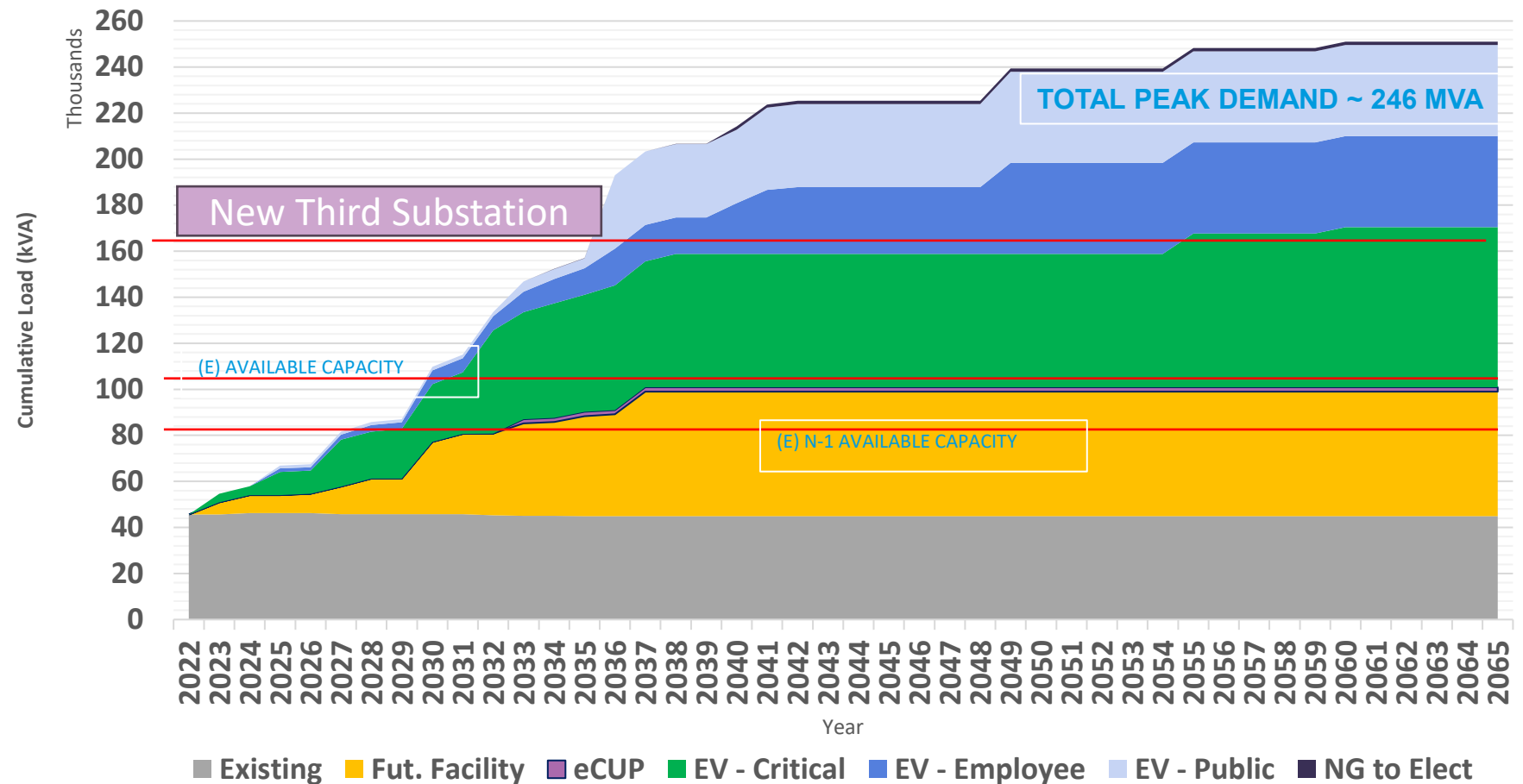


# Future Projects : Electrical Utilities Development

## Securing Airport's Future:

1. Hetch Hetchy provided hydropower in 1925
2. SFO long term partnership with SFPUC & PG&E
3. Balance airport and community needs

Demand Load vs. Year Per Category

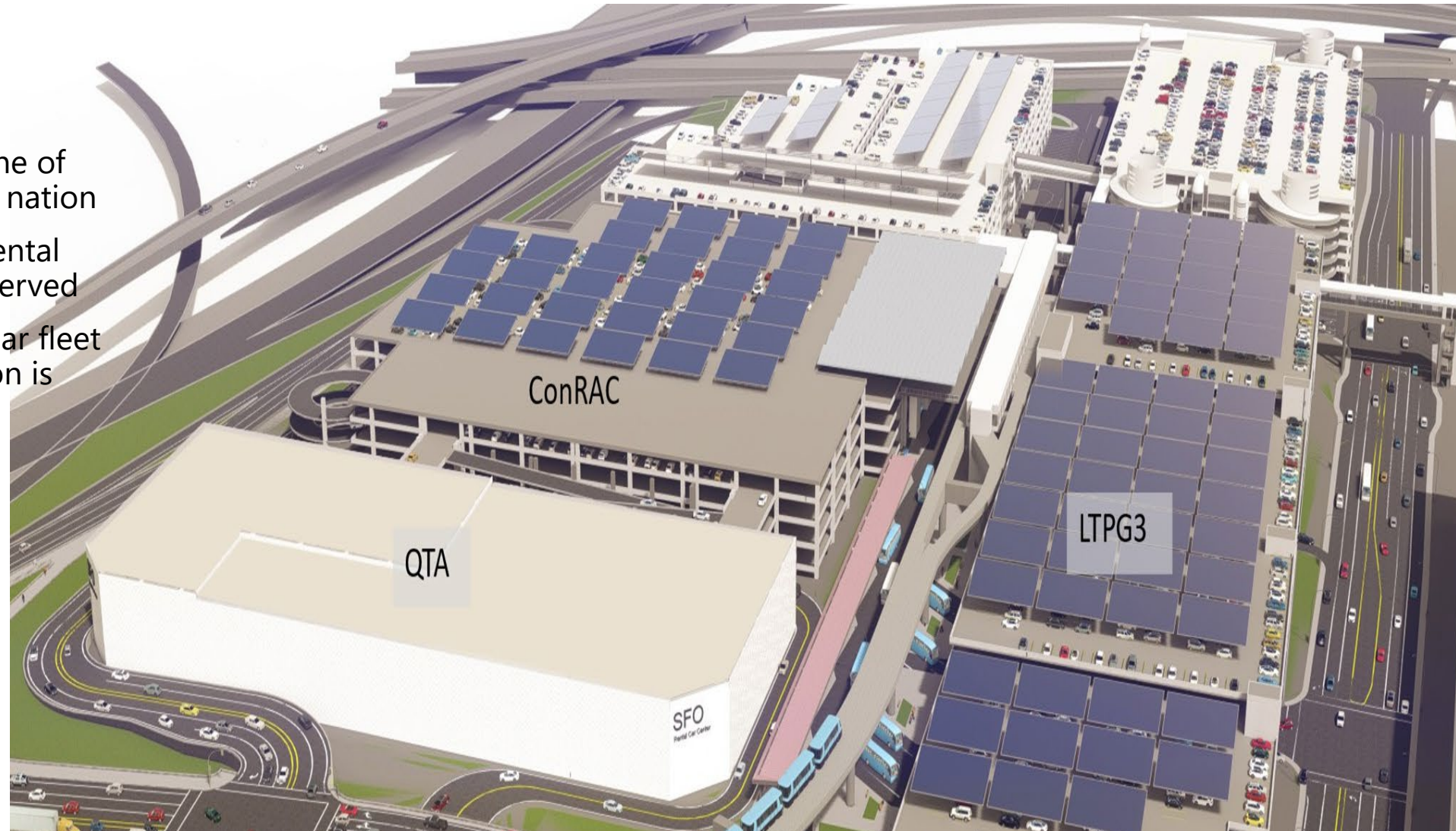




# Future Projects : Rental Parking Development

## Securing Airport's Future:

1. SFO rental car facility one of the oldest facility in the nation
2. Post covid increase in rental car usage has been observed
3. Rental operations and car fleet changes accommodation is necessary in the future





# Future Projects : Shoreline Protection Program

## Securing Airport's Future:

1. Protect the airport from sea level rise and king tide
2. Respond to 100year 6hour storm





# Adaptation: Autonomous Vehicles

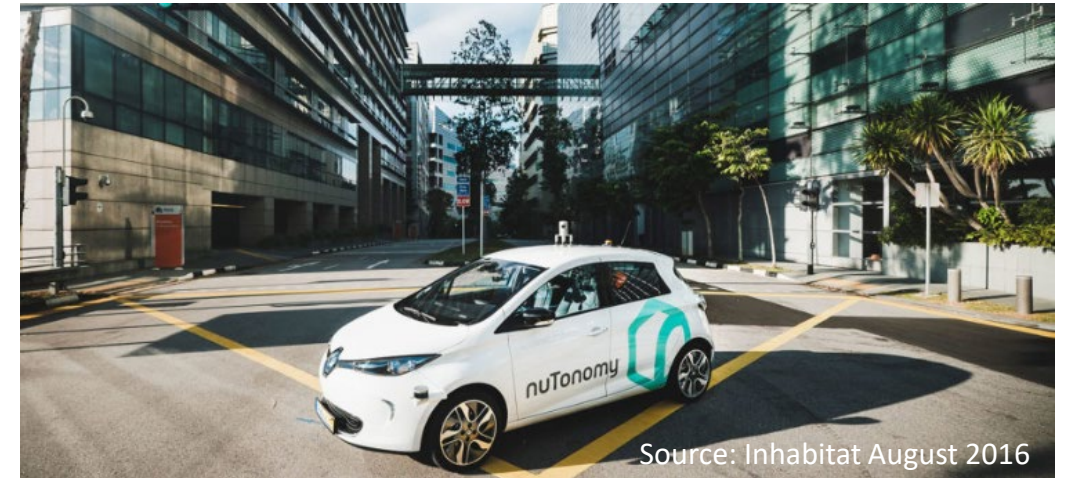
## Future Infrastructure Requirements

- Charging and Maintenance
- Remote Monitoring
- Tailor landside and airside rules and regulations
- Improve vehicular and pedestrian safety

## Autonomous Campus Shuttles



## Autonomous Vehicles



## Autonomous Ground Service Equipment



# Adaptation: Aircraft Innovations

## Future Infrastructure Requirements

- Landing, Takeoff and passenger processing facilities
- Hydrogen production, distribution and refueling
- Improvements to widebody aircrafts

## Electric Air Taxis



Source: Archer and Killroy Realty, June 2024

ARCHER KILROY

## Hydrogen-Powered Regional Jets



Source Airbus Group, 2022

## Hydrogen-electric cargo operations



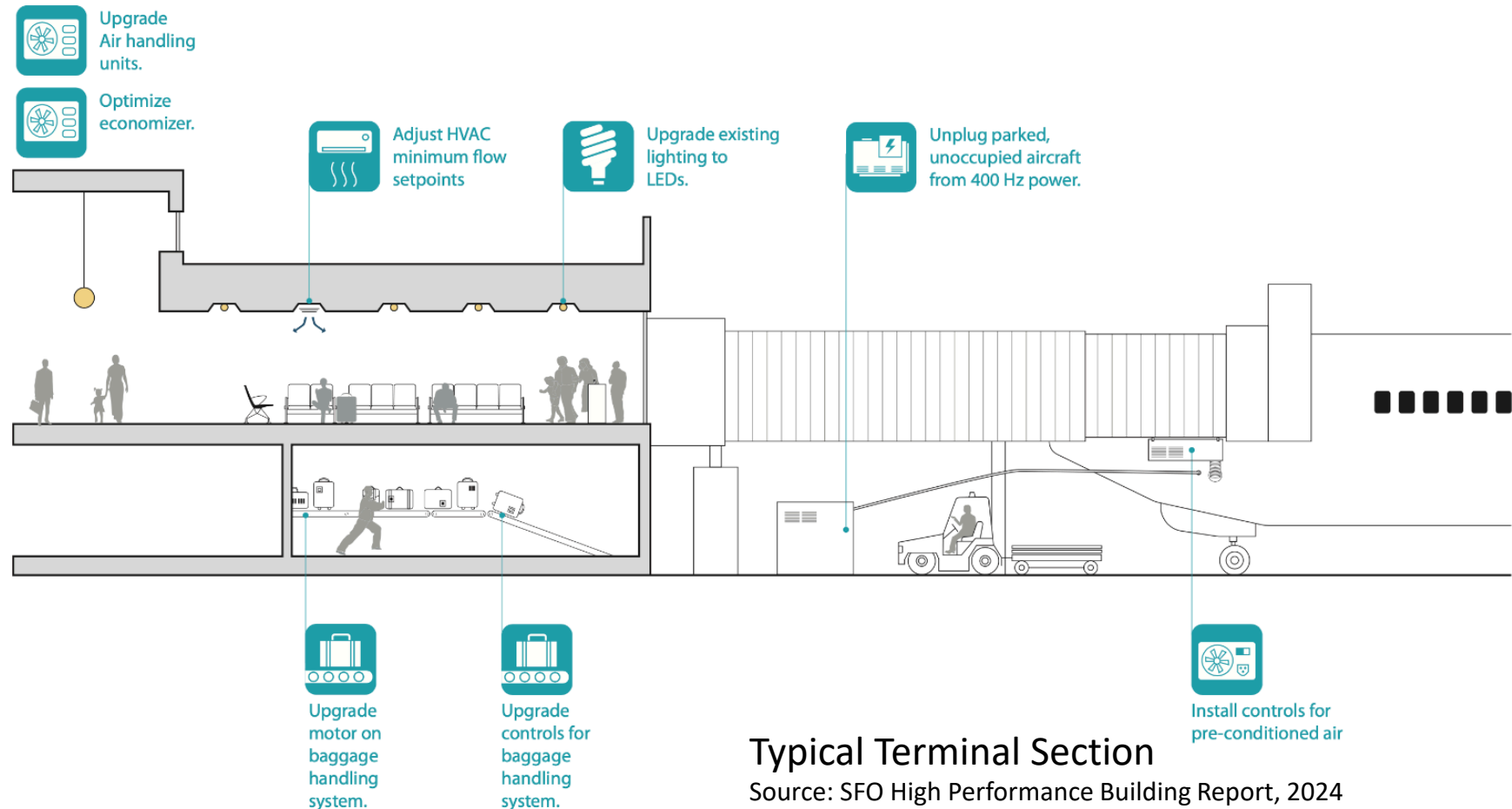
Source : ZeroAvia and RVL Aviation, May 2025



# Adaptation: Building Performance Management Innovation

## Future Infrastructure Requirements

- Maintain high performance building systems
- Data management, monitoring and response capabilities
- Campus-wide maintenance and re-life programs to preserve airport facility usage



Typical Terminal Section

Source: SFO High Performance Building Report, 2024



Thank You.

