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Project Name
AH2011-07 Ellison Onizuka Kona International Airport at Keahole Master Plan Update

Date of Meeting
September 11, 2025

HNTB Project #
87606

Location
MS Teams

Purpose of Meeting
PAC/TAC Combined Meeting #2

Time
10:30 A.M. HST

Attendance via MS Teams	
Name	Organization
Refer to the attached attendee list PDF for the full details	

MEETING NOTES

1. **Welcome and Introductions**
   - **a.** Ford Fuchigami (Ford F.), Airports Administrator at the Hawaii Department of Transportation (HDOT), gave opening remarks and emphasized the importance of developing a master plan that is both realistic and actionable. He also highlighted the need to explore alternatives that could help address the constrained utility system that the airport is currently experiencing and will continue to face with future developments.
   - **b.** David Blancett-Maddock (David Blancett-M.), representative from the Kona General Aviation Committee (KGAC), emphasized KOA's potential for aviation training and development, noting existing facilities and opportunities for growth. David Blancett-M. suggested exploring long-term planning and partnerships to create permanent improvements and strengthen the airport community. Ken Poon (Ken P.), the consultant project manager acknowledged and suggested that these considerations about helicopter tours, flight training, and potential growth in aviation would be something that they would look more closely at during the facility requirements stage of the master plan.
2. **Aviation Activity Forecast Scope and Purpose**
   - **a.** Ken P. provided an overview of the scope and purpose of the aviation activity forecast. The scope includes forecasts of passenger enplanements, air cargo tonnage, future fleet mix, aircraft operations, based aircraft, and peak activity at the airport. The purpose is to identify future facility requirements as part of the KOA Master Plan Update and to submit the forecast to the Federal Aviation Administration (FAA) for approval.
   - **b.** Ken P. also provided a summary of the historical FAA Terminal Area Forecast (TAF) for KOA. According to the FAA's Forecast Review and Approval Instructions (August 2024), sponsor-developed forecasts are considered consistent with the TAF if they differ by less than 10% in the 5-year forecast period and less than 15% in the 10-year forecast period.
   - **c.** Greg Casto (Greg C.) inquired whether helicopter operations were included within the presented figures or would be reported separately. Ken P. clarified that helicopter operations are primarily classified under local general aviation (GA) activities as they typically operate in a local traffic pattern. Greg C. requested that helicopter and fixed-

wing operations be clearly delineated to ensure accurate categorization. Ken P. confirmed that the forecast has been structured accordingly to maintain a clear distinction between the two types of operations.

3. **Historical Airport Activity**
    a. Ken P. presented an overview of the historical airport activity trends to support the development of the 20-year forecast. Passenger enplanement data indicated two significant declines over the past two decades, occurring during the 2007 to 2008 Great Recession and the 2019 to 2020 COVID-19 pandemic, with enplanements now largely recovered to pre-pandemic levels.
    b. Greg C. inquired about the purpose of using the federal fiscal year instead of the State of Hawaii fiscal year. Traci Lum (Traci L.) explained that since the aviation activity forecast requires FAA approval and will be compared against the TAF, the federal fiscal year is more appropriate for the analysis.
    c. Ken P. presented historical aircraft operations from 2005 to 2024, categorized according to the FAA Terminal Area Forecast (TAF) classifications, including air carrier, air taxi, GA, and military operations. He noted that air carrier operations closely mirror passenger enplanement trends, while GA activity represents a significant portion of total operations at KOA. A decline in air taxi activity was observed in the post-pandemic period due to reduced service and fewer carriers operating smaller aircraft defined under the FAA's air taxi category.
4. **Economic Trends**
    a. Ken P. provided a summary of key economic trends influencing the aviation activity forecast, emphasizing that passenger demand at KOA is driven by overall economic strength, air service availability, and Hawaii's reliance on tourism. He explained that the forecast considered economic data at the county, state, regional, and national levels, including Hawaii County, the State of Hawaii, the U.S. Mainland, and California. Data from the Hawaii Department of Business, Economic Development and Tourism (DBEDT) indicated that approximately 81 percent of KOA's arriving passengers are tourists, with about two-thirds originating from the U.S. Mainland and 8 percent from international markets such as Canada and Japan.
    b. Ken P. noted that visitor volumes have returned to pre-pandemic levels by 2023 and cited projections from Woods and Poole Economics showing U.S. GDP growth averaging 1.86 percent annually between 2024 and 2044, suggesting continued economic strength that supports tourism demand. He also highlighted an increase in accommodation inventory in the Kohala and Kona regions from 9,130 units in 2022 to 9,986 units in 2024, indicating ongoing investment in visitor infrastructure and a positive outlook for future passenger growth.
5. **Forecast Approach and Results**
    a. Andrew Blaisdell (Andrew B.) from HNTB outlined the forecast methodology, explaining that the enplanement forecast was developed using a regression model based on economic indicators such as the U.S. GDP, adjusted for the Great Recession and COVID-19 impacts. The model produced the domestic enplanement forecast. For the international enplanement forecast, a focused demand assessment was conducted, which revealed continued strength in Canadian travel but slower recovery in Japanese tourism due to unfavorable exchange rates.
    b. The passenger enplanement forecast developed by the project team indicates a compound annual growth rate (CAGR) of 1.72 percent, compared to the FAA TAF rate of 1.88 percent. It begins slightly higher than the TAF in 2024, with enplanements approximately 2.7 percent above TAF estimates, and ends just 0.5 percent below by

2044. The forecast remains well within FAA variance thresholds, with only a 2.2 percent deviation in the five-year horizon and 1.7 percent in the ten-year horizon.

c. Andrew B. also presented the aircraft operations forecast summary, noting a total CAGR of 1.04 percent. Total operations are projected to increase from 119,663 in 2024 to 147,048 by 2044. He explained that the forecast is approximately 6 percent higher than the FAA TAF in both the five-year and ten-year horizons but remains within the FAA's variance thresholds of less than 10 percent and 15 percent, respectively.

d. Ken P. presented the based aircraft forecast approach, explaining that the team began with the most recently updated inventory, finalized last month, identifying a total of 50 based aircraft categorized as single-engine, multi-engine, and helicopters. Growth projections were developed using rates from the FAA Aerospace Forecast for Fiscal Years 2025–2045. He noted a slight variance between the project team's forecast and the FAA TAF, primarily due to timing differences in data reporting and inventory updates. Ken P. added that while the TAF reflects a sharp increase in based aircraft between 2023 and 2024, the project team's forecast assumes a more gradual growth pattern based on FAA fleet delivery trends.

6. Peak Activity Projections

a. Andy Guan (Andy G.) presented the final component of the aviation activity forecast, focusing on the identification of the Average Day in the Peak Month (ADPM) and peak hour analysis. He explained that understanding peak activity is essential for determining future facility requirements such as gates, terminals, and other infrastructure. Based on a review of the 2023 and 2024 data, July was identified as the peak month, and July 19, 2024, was selected as the ADPM since it closely matched the monthly average for both operations and passenger seat counts. The Design Day Flight Schedule (DDFS) will be developed using patterns from the forecast results to model future daily operations and passenger demand for facility planning purposes.

b. Ford F. inquired about the activity breakdown between intra-island and transpacific operations during the peak hours. Andy G. responded that the data would be provided separately after the meeting.

i. Post-meeting Response: On the baseline design day (July 19, 2024), during the arrival peak hour (11:05 a.m. to 12:05 p.m.), there were four interisland and four transpacific arrival flights, totaling 1,380 arrival passenger seats. Of these, 41% (559 seats) were from interisland flights and 59% (821 seats) from transpacific flights. During the departure peak hour (12:20 p.m. to 1:20 p.m.), there were also four interisland and four transpacific departure flights, with a total of 1,380 departure passenger seats. Again, 41% (559 seats) were from interisland flights and 59% (821 seats) from transpacific flights.

7. Next Steps

a. Ken P. reviewed the project schedule, noting that the team is completing the second PAC and TAC meetings, with three remaining to address facility requirements, alternatives development, and the implementation plan.

b. He announced that Open House #1 is scheduled for Thursday, September 25, from 6:00 to 7:30 p.m. at the West Hawaii Civic Center.

c. Ken P. concluded by stating that the next steps include submitting the updated aviation activity forecast for FAA review and proceeding with facility requirements development.

8. Other Questions and Comments:

a. **Question:** David Blancett-M. asked if large-scale cargo systems, like Amazon, which were initially attracted to the area, are being factored into the future planning?

Response: Ford F. responded that HDOT has been in discussions with Amazon, however, Amazon's plans have changed, and they have not received any further updates from the company.

b. **Question:** Ford F. inquired about how cargo activities at KOA have been affected by the suspension of non-stop flights from KOA to Japan.
Response: Domestic cargo tonnage has recovered rapidly since 2020, largely driven by the e-commerce boom and increased reliance on air freight. As consumers shifted to online shopping during the early stages of pandemic recovery, demand for air cargo surged. In contrast, international cargo tonnage remains low, as it depends heavily on belly cargo capacity from international passenger flights, which has yet to return to pre-pandemic levels at KOA. Total air cargo tonnage peaked at 3,034 tons in 2018, primarily due to belly cargo from Japan Airlines and Hawaiian Airlines. At the time, Japan Airlines operated daily nonstop service between Tokyo Narita (NRT) and KOA, while Hawaiian Airlines flew between KOA and Tokyo Haneda (HND) three times weekly. However, Hawaiian Airlines surrendered its round-trip KOA-HND slot, effective April 2, 2024, limiting future belly cargo opportunities on that route. Historical data from 2019 and 2020 (the peak years for both services) shows that Japan Airlines accounted for over 76% of international belly cargo, while Hawaiian Airlines contributed less than 8%. Therefore, the loss of Hawaiian's service is not expected to have a significant impact on forecast international cargo tonnage.

c. **Comment:** In response to Andrew B.'s explanation about limited Japan service being due to exchange rates, Ford F. highlighted the challenges of re-establishing direct flights to Japan from Kona, pointing out that getting a slot at a Japanese airport from the U.S. Department of Transportation would be a greater challenge than finding an airline willing to fly.
Response: Andrew B. responded that their approach to Japan service is to maintain the current level of service, acknowledging that there are still a few flights from bridge nations, and confirming that they are not projecting significant growth back to the 2019 levels due to the challenges Ford F. had mentioned.

d. **Question:** David Blancett-M. asked: Does the forecast consider the future of electric aircraft? (Specifically, are electric aircraft included in the piston category?)
Answer: Andrew B. responded that while the FAA's aerospace forecast mentions electric aircraft and eVTOL (electric vertical takeoff and landing) aircraft, they have not yet developed specific growth rates for these types of aircraft. The current project still uses traditional aircraft categories, and electric aircraft are not explicitly included in piston. Greg C. also noted that, at SFO, they are starting to factor in electric aircraft into their operations breakdown. Andrew added that a slight piston decline is expected as aircraft age out or pilots move to turbine.

e. **Comment:** David Blancett-M. commented on the decline of single-engine aircraft, suggesting it may be due to Hawaii's unique circumstances. He added that it's challenging to get aircraft in and out of the state, and many aircraft in their inventory might be considered derelict or unusable. David asked if there would be a designated spot to maintain these aircraft instead of having them removed.
Response: Ken P. responded that the comment would be taken into consideration as the project moves forward.

Name	Organization
Llewellyn Fukui	Allied Universal
Carlos Charpenel	Amazon
Jonathan Messerer	American Airlines
Erin Khan	Anthology Group
Robert Washington	Anthology Group
Nicholas Read	Atlantic Aviation
Timothy Elliott	Atlantic Aviation
Greg Casto	AvAirPros
Janelle Del Rosario	Avis
Tom Owen	Big Island Jet Center
Bryce Yoshikawa	Bowers + Kubota Consulting
Keith Okamoto	County of Hawaii (COH), Department of Water Supply
Christopher Laude	County of Hawaii (COH), Environmental Management
Michael Egan	Customs and Border Protection (CBP)
Blaine Peters	Delta Air Lines
Carlos Salas	Federal Aviation Administration (FAA)
Gordon Wong	Federal Aviation Administration (FAA)
Kandyce Watanabe	Federal Aviation Administration (FAA)
Kevin Nishimura	Federal Aviation Administration (FAA)
Kimberly Evans	Federal Aviation Administration (FAA)
Rachel Look	Federal Aviation Administration (FAA)
Renee Ellorda	Federal Aviation Administration (FAA)
Roger Ross	Hawaii Department of Transportation (HDOT), Airports
Chauncey Wong Yuen	Hawaii Department of Transportation (HDOT), Airports
Craig Bisgard	Hawaii Department of Transportation (HDOT), Airports
Curt Otaguro	Hawaii Department of Transportation (HDOT), Airports
Cy Duvauchelle	Hawaii Department of Transportation (HDOT), Airports
Ford Fuchigami	Hawaii Department of Transportation (HDOT), Airports
Francis Ryan G Aguinaldo	Hawaii Department of Transportation (HDOT), Airports
Melanie Barroga	Hawaii Department of Transportation (HDOT), Airports
Nathan Kaneshige	Hawaii Department of Transportation (HDOT), Airports
Traci Lum	Hawaii Department of Transportation (HDOT), Airports
Ken Tatsuguchi	Hawaii Department of Transportation (HDOT), Highways
Jason Maga	Hawaii Fueling Facilities Corporation
Daniel Collins	Hawaiian Airlines
Elizabeth Loomis	Hawaiian Airlines
Keohookapalai Kitashima	Hawaiian Airlines
Marie Guzman	Hertz Corporation
Andrew Blaisdell	HNTB
Andy Guan	HNTB
Brandon Ross	HNTB
Ken Poon	HNTB
David Blancett-Maddock	Kona General Aviation Committee (KGAC)
David Holloway	KYA Inc.
Kyle Wang	KYA Inc.
Benjamin Fouts	Mauna Loa Helicopter
Kalei Gregory	Paradise Helicopters
Brice Allen	Signature Aviation
Sabrina Taylor	Signature Aviation
Ramon Calderon	SIXT
Eric Mitsuyoshi	Transportation Security Administration (TSA)
Sean Mayo	Turo
Steven Benson	Turo
Bart Kihara	United States Postal Service
Eileen Veach	United States Postal Service