



2026 Arizona State Aviation System Plan

September 2026



ARIZONA
— DEPARTMENT OF —
TRANSPORTATION

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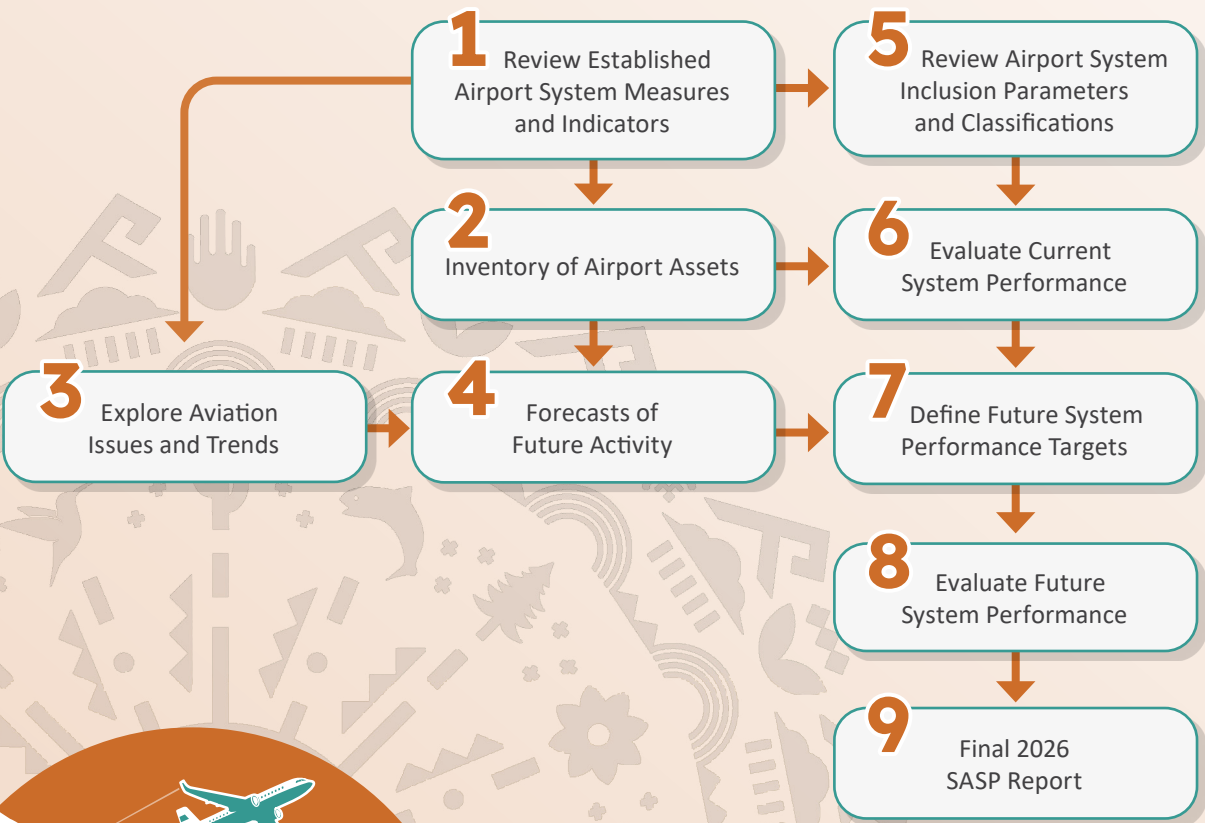
Introduction

The Grand Canyon State is home to a robust aviation system that plays a vital role in the continued prosperity and well-being of Arizona’s residents, businesses, and communities.

As the state’s airport system is essential for moving people and goods across the state and beyond, it is critical to perform long-term planning for the system to maintain its effectiveness. The Arizona Department of Transportation Aeronautics Group (ADOT) uses the State Aviation System Plan (SASP) to guide this effort and has updated it regularly over time. System plans such as the Arizona SASP are developed to document current conditions at system facilities and provide analysis to guide aviation development over a 20-year planning horizon. The most recent Arizona SASP was completed in 2018. ADOT conducted the 2026 SASP to evaluate changes since the prior study and determine progress made, while establishing a future course for the system’s continued success. The 2026 SASP supports ADOT’s future planning and decision-making for the state’s airport system.

Plan Process

The 2026 SASP process builds on the prior 2018 SASP Update to comprehensively assess the capabilities of the airport system. The process follows a nine-step structured workflow that starts by documenting system conditions, goals and metrics, as well as potential issues and influences, before evaluating performance and making recommendations for future improvements. Throughout this process, the Project Advisory Committee (PAC) composed of 19 members representing airports, the Federal Aviation Administration (FAA), metropolitan planning organizations (MPOs), state agencies, chambers of commerce, aircraft manufacturers, military-representative organizations, and aviation consultants helped guide decisions and ensure the plan reflects statewide needs.



2024 System Facts

67 system airports **1.5** million aircraft operations

28.5 million enplanements

6,371 based aircraft



Arizona Airport System

Arizona’s airport system includes over 300 registered landing facilities, with 67 publicly owned, public-use airports analyzed as part of the SASP. The public system consists of all 59 facilities included in the FAA’s National Plan of Integrated Airport Systems (NPIAS) and eight additional publicly owned non-NPIAS airports. These 67 system airports range from small rural general aviation (GA) facilities to large commercial hubs serving millions of passengers per year. The 2026 SASP assigned state airport role classifications based on factors such as NPIAS status, airline service availability, and the availability of aircraft fuel, recognizing the different functions airports serve within Arizona’s aviation system. These roles help ADOT evaluate airport needs, guide funding and investment decisions, and prioritize improvements that support communities, foster economic growth, and improve statewide connectivity.

Airports by Classification



Commercial Service (9)



National-Reliever (10)



GA-Community (23)



GA-Rural (9)



GA-Basic (7)



GA-State (9)

System Vision and Goals

The 2026 SASP vision establishes a long-term framework for ensuring Arizona’s aviation system can meet the needs of citizens, visitors, and businesses by supporting economic competitiveness, connectivity, accessibility, safety, and responsible resource management. Building on this vision, ADOT adopted the seven goals identified in the 2050 Arizona Long-Range Transportation Plan (LRTP), creating a direct connection between aviation planning and the state’s broader transportation priorities. This alignment ensures that airport investments and system improvements contribute to a coordinated, multimodal transportation network while supporting Arizona’s long-term mobility, safety, environmental, and economic objectives.

System Vision

To provide the framework that will allow Arizona’s aviation system to meet the needs of citizens, visitors, and businesses by supporting economic competitiveness, connectivity, and accessibility with a commitment to safety, sound resource management, and partnership.

Under the seven goals, Performance Measures (PMs) are used to evaluate the system’s performance in key metrics, while System Indicators (SIs) indicate the overall health of the airport system.



Preserve and Maintain the System

Protect and improve existing airport infrastructure to maximize its long-term value and performance.

Enhance Safety and Security

Maintain a safe and secure aviation system for airport users, operators, and surrounding communities.

Support Economic Vitality

Maintain an airport system that supports business activity, job creation, and economic growth throughout Arizona.

Promote Environmental and Health Stewardship

Encourage sustainable airport development that enhances system resilience and minimizes environmental impacts.

Strengthen Partnerships

Foster collaboration among airport sponsors, agencies, and industry stakeholders to achieve shared aviation goals.

Support Equitable Access

Provide communities across Arizona with reasonable access to the statewide airport network and the opportunities it supports.

Improve Mobility, Reliability, and Accessibility

Support efficient and dependable movement of people and goods while improving access to aviation services.

Aviation-Related Trends

Airports do not operate in a vacuum – meaning they can be influenced by external trends and factors that affect both operations and demand. Key trends in Arizona’s aviation system can be grouped into four areas: socioeconomic patterns, market shifts, regulatory and policy changes, and emerging technologies.

Evaluating emerging trends is essential to understanding how Arizona’s aviation system may evolve over the coming decades and identifying factors that could influence airport demand, operations, infrastructure needs, and investment priorities. As conditions continue to change, airports must be prepared to adapt to new challenges and opportunities while maintaining a safe, efficient, and connected system. Assessing these trends provides ADOT and airport stakeholders with the information needed to make informed planning decisions, prioritize future investments, and ensure the statewide aviation system remains resilient and responsive to Arizona’s long-term needs.

Socioeconomic Patterns

Arizona’s population is projected to grow 27%, increasing from 7.6 million to nearly 9.6 million by 2044.

Statewide employment is expected to increase from 4.3 million jobs in 2024 to 5.8 million in 2044 (35% growth).

Arizona’s Gross Regional Product (GRP) is projected to grow 47%, from \$3.7 trillion to more than \$5.7 trillion.

Median household income in the state is projected to reach approximately \$133,000 by 2044 (2012 dollars).¹

Market Shifts

Growing integration of air, rail, roadway, and other transportation modes may increase the importance of multimodal connections that improve access to airports and support seamless travel throughout the state.

Airlines may continue up-gauging their fleets by using larger aircraft, increasing passenger volumes and infrastructure demands at commercial service airports.

Electric aircraft may expand regional air service connectivity beyond current commercial service airports.

Regulatory and Policy Changes

Changes to state and FAA funding structures may open new opportunities for project support but may force funding agencies to spread money across a wider range of airport requests.

Airport planning must evolve as the FAA transitions to the Traffic Flow Management System Counts (TFMSC) and automatic dependent surveillance-broadcast (ADS-B) become standard for aircraft operation tracking.

Alternate funding sources may be needed to support airport needs beyond what the FAA’s Airport Improvement Program (AIP) can provide.

Emerging Technologies

Advanced Air Mobility (AAM) will introduce a new operational concept focused on short-distance travel using aircraft like electric vertical takeoff and landing [eVTOL] aircraft to improve connectivity within cities and between communities.

Adoption of sustainable aviation fuels (SAF), unleaded AvGas, electric aircraft, and hydrogen may support a more sustainable industry while requiring airports to adapt infrastructure and operational practices.

Vertiports may be developed for eVTOL operations in cities, decentralizing aviation infrastructure away from conventional airports.

On-airport microgrids with self-contained power generation and storage may help airports expand their energy capacity and resilience for future charging needs.

¹2012 dollars were used for this analysis to account for inflation

Future Aviation Demand

Future aviation demand is a key factor in identifying system needs and guiding long-term planning for Arizona’s airports. Demand is evaluated across both commercial service and GA airports, using metrics such as passenger enplanements, based aircraft, aircraft operations, and air cargo shipments. The forecasts provide an outlook of expected activity over the next 20 years (through 2044) using a compound annual growth rate (CAGR), highlighting trends in passenger traffic, flight operations, and GA usage to help determine future capacity, infrastructure, and investment needs across the statewide system.

Indicators of Aviation Activity

Enplanements

Commercial passengers boarding an aircraft

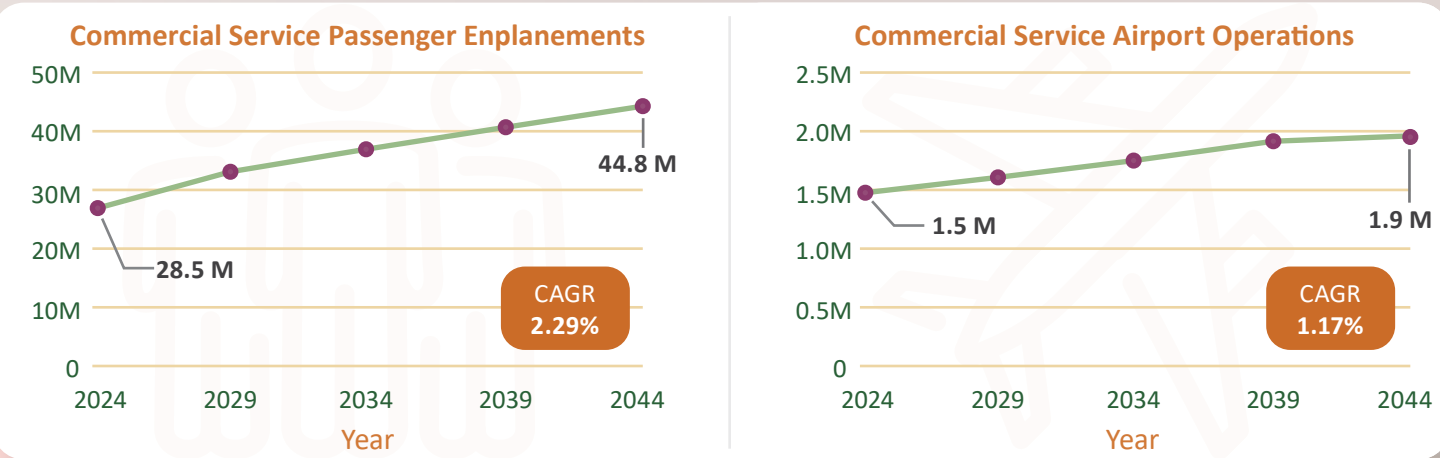
Operations

Take-offs and landings conducted by all aircraft types

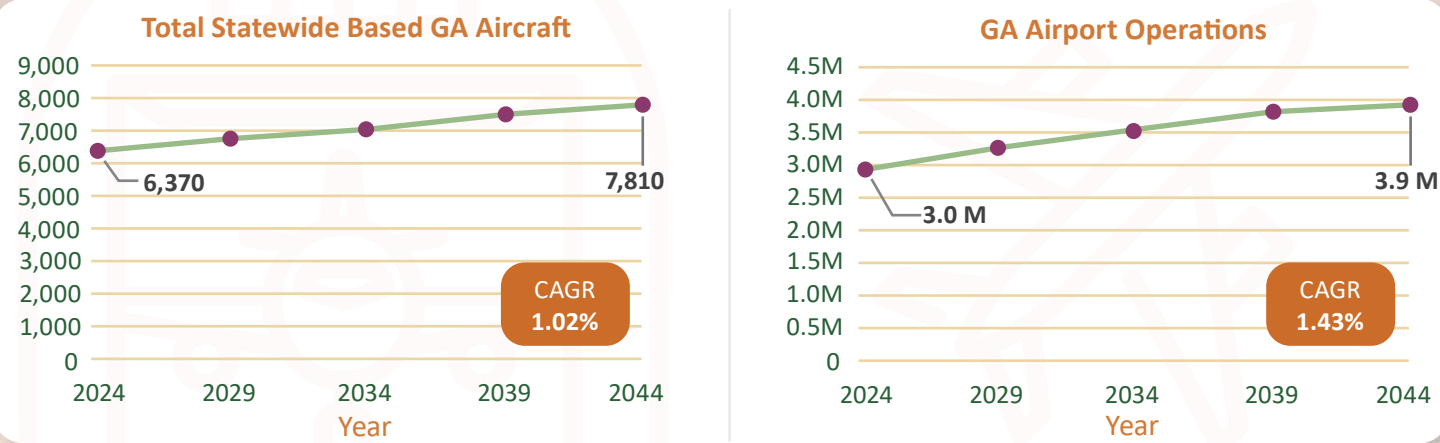
Based Aircraft

Operational and airworthy GA aircraft typically housed at an airport the majority of the year

Forecasts for Arizona Commercial Service Airports



Forecasts for Arizona General Aviation Airports



Air Cargo Demand Forecasts

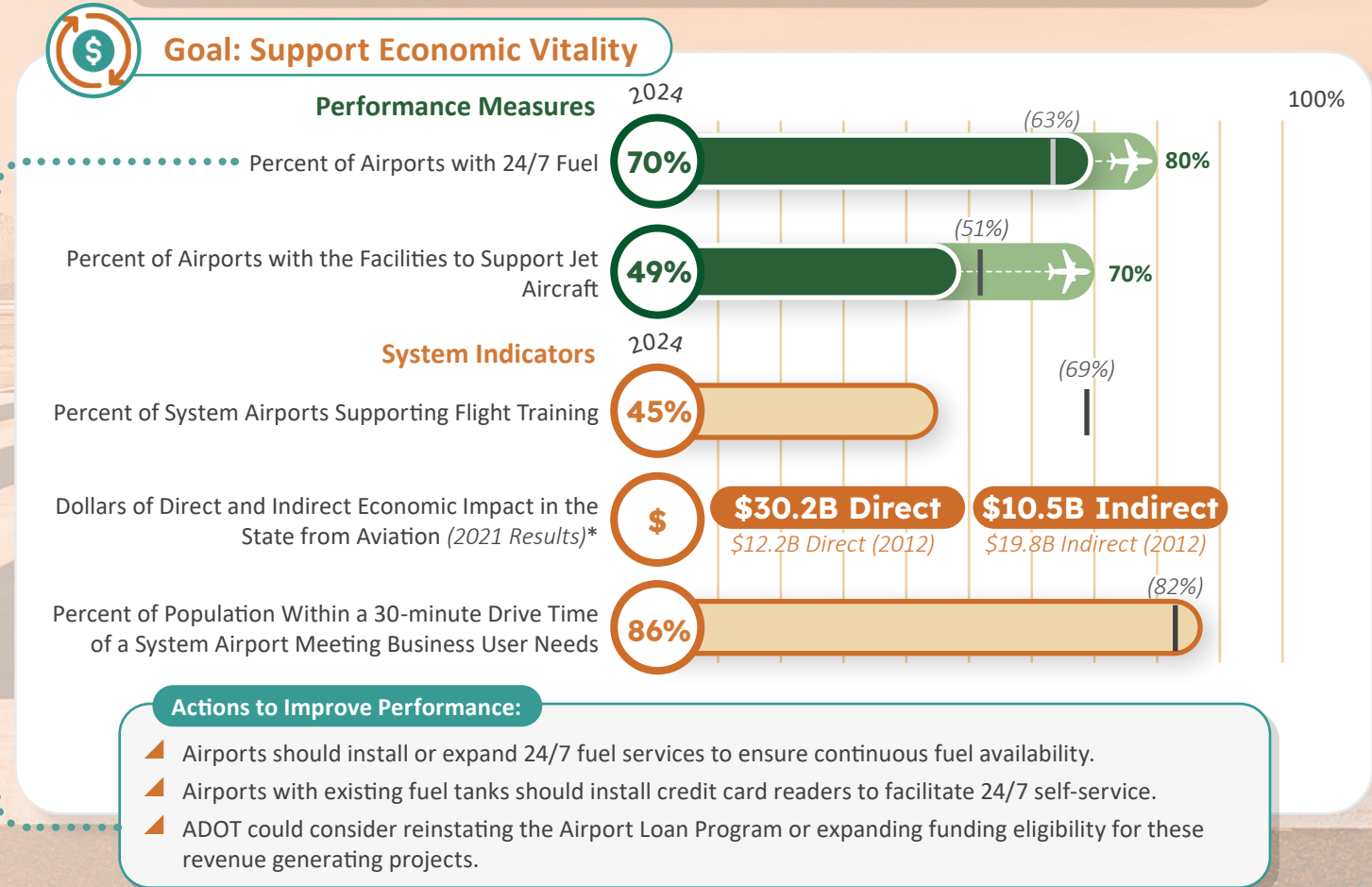
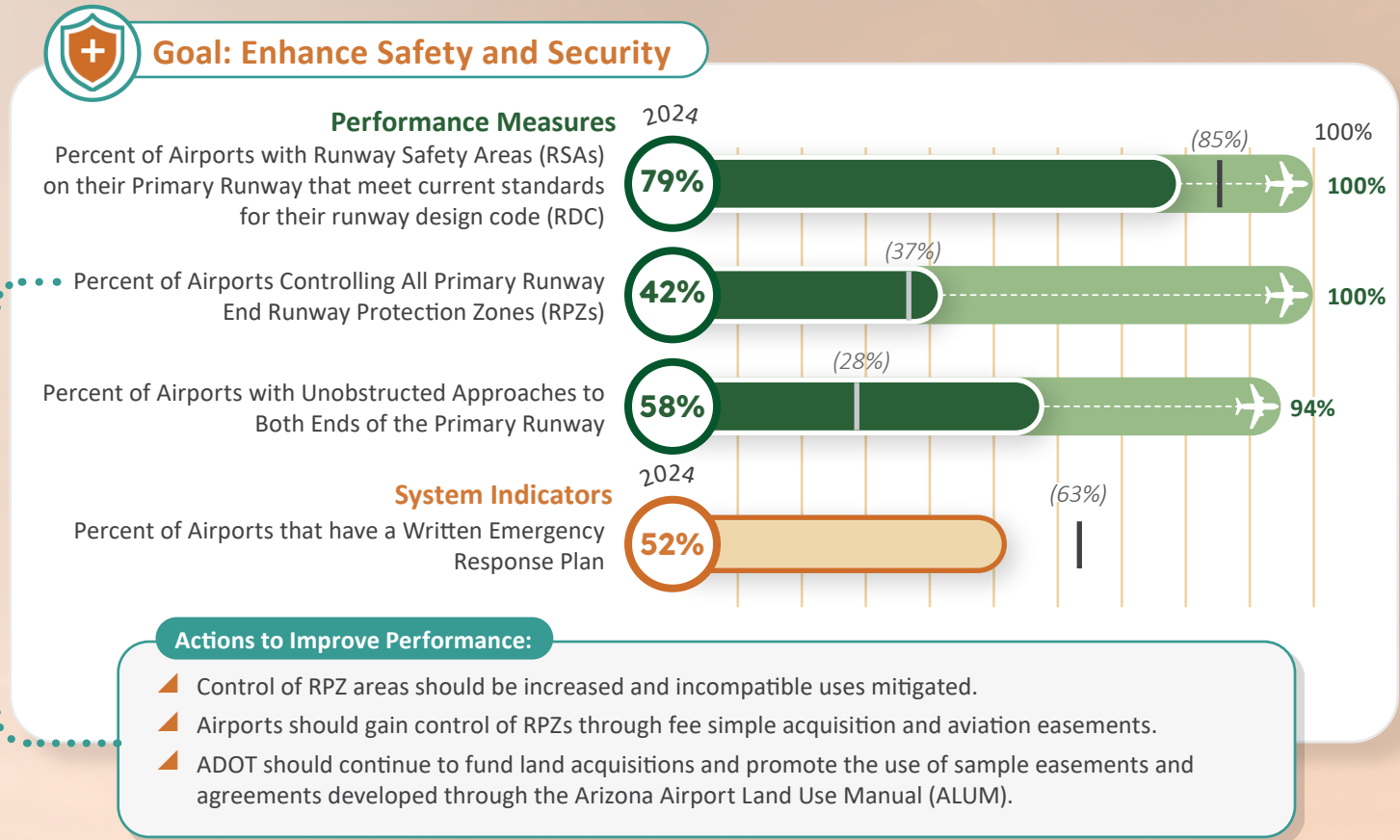
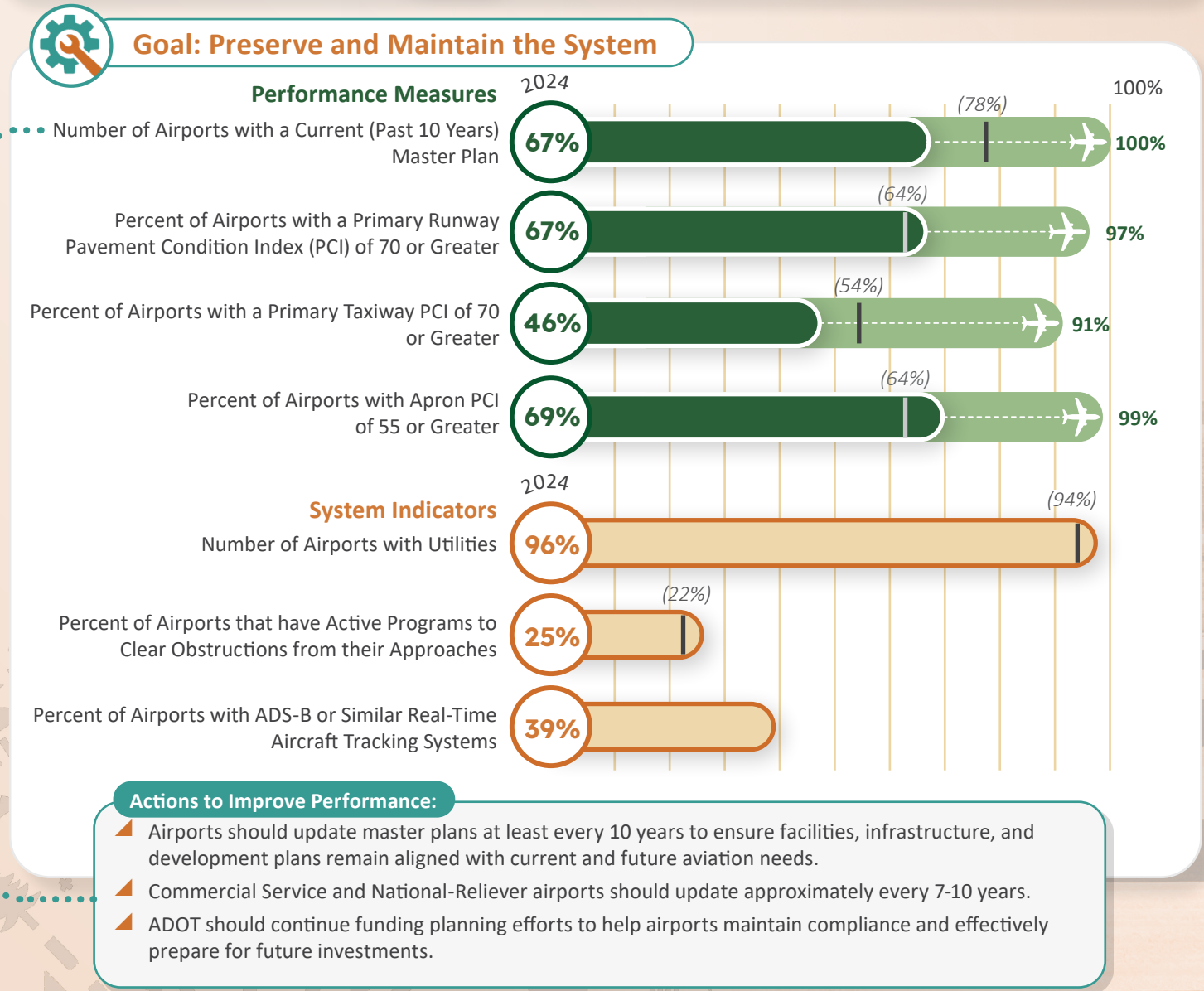
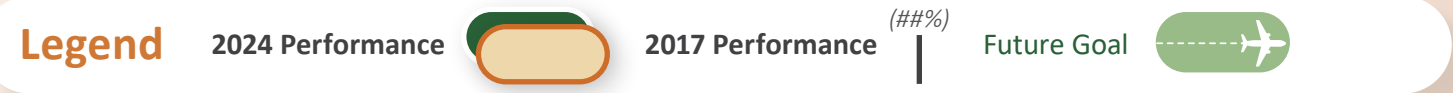
▲ Air cargo movements were also forecast at a statewide level to understand how future freight demand may affect the usage of Arizona’s airports. Total air cargo tonnage is expected to increase from roughly 371,000 tons in 2024 to 631,000 tons in 2044 (2.7% CAGR), representing an increase in total cargo value from \$12.3 billion to \$22.0 billion over the same period (2.9% CAGR)



System Performance Assessment

Using 2024 baseline data gathered from airport representatives, state agencies, and federal resources, the 2026 SASP evaluated whether the airport system was performing optimally and if it is capable of accommodating future demand. System performance is assessed through a set of PMs and SIs to track progress and identify gaps. The assessment also established future performance targets, which set measurable goals related to the PMs to guide investments, monitor changes, and ensure resources are used effectively moving forward. In areas where current performance does not meet future targets, the 2026 SASP identified actions to improve performance, which influence the project and policy recommendations to ultimately advance toward the system goals.

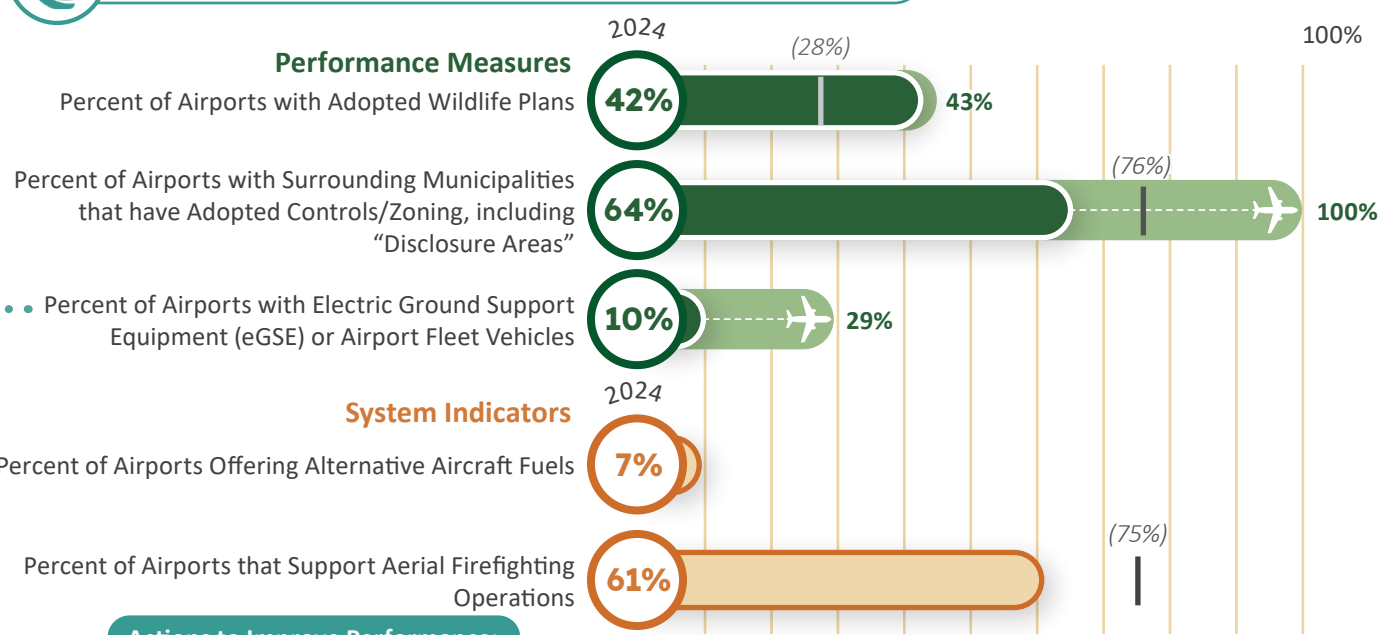
The systemwide performance is summarized in 16 PMs and 16 SIs, with future targets established for PMs. A comparison to 2017 performance is presented for the 12 PMs and 11 SIs that were carried forward from the 2018 SASP. In some instances, prior 2017 performance was lower and other cases it was higher than 2024 performance. Examples of actions that can be taken to improve performance are presented for select PMs.



*2018 economic impacts sourced from 2012 Arizona Aviation Economic Impact Study (AEIS). 2026 impacts sourced from 2021 Arizona AEIS.



Promote Environmental and Health Stewardship

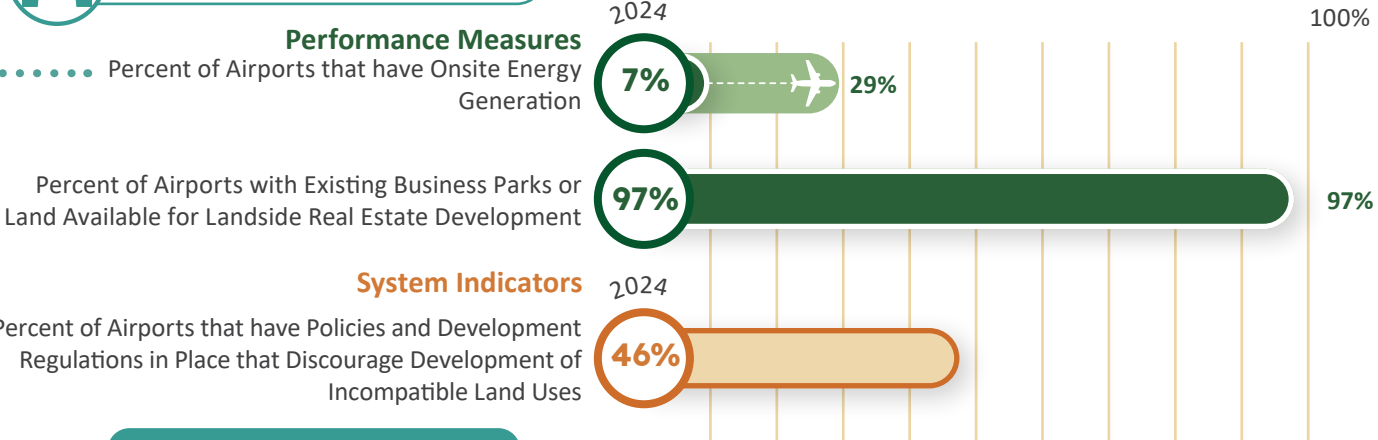


Actions to Improve Performance:

- ▲ Airports should consider electric vehicles when refreshing their fleet and plan for associated infrastructure improvements.
- ▲ ADOT could consider reinstating the Airport Loan Program and making eGSE and electric fleet vehicles eligible for funding.
- ▲ Commercial Service Airports should coordinate with airlines to integrate eGSE where appropriate.



Strengthen Partnerships

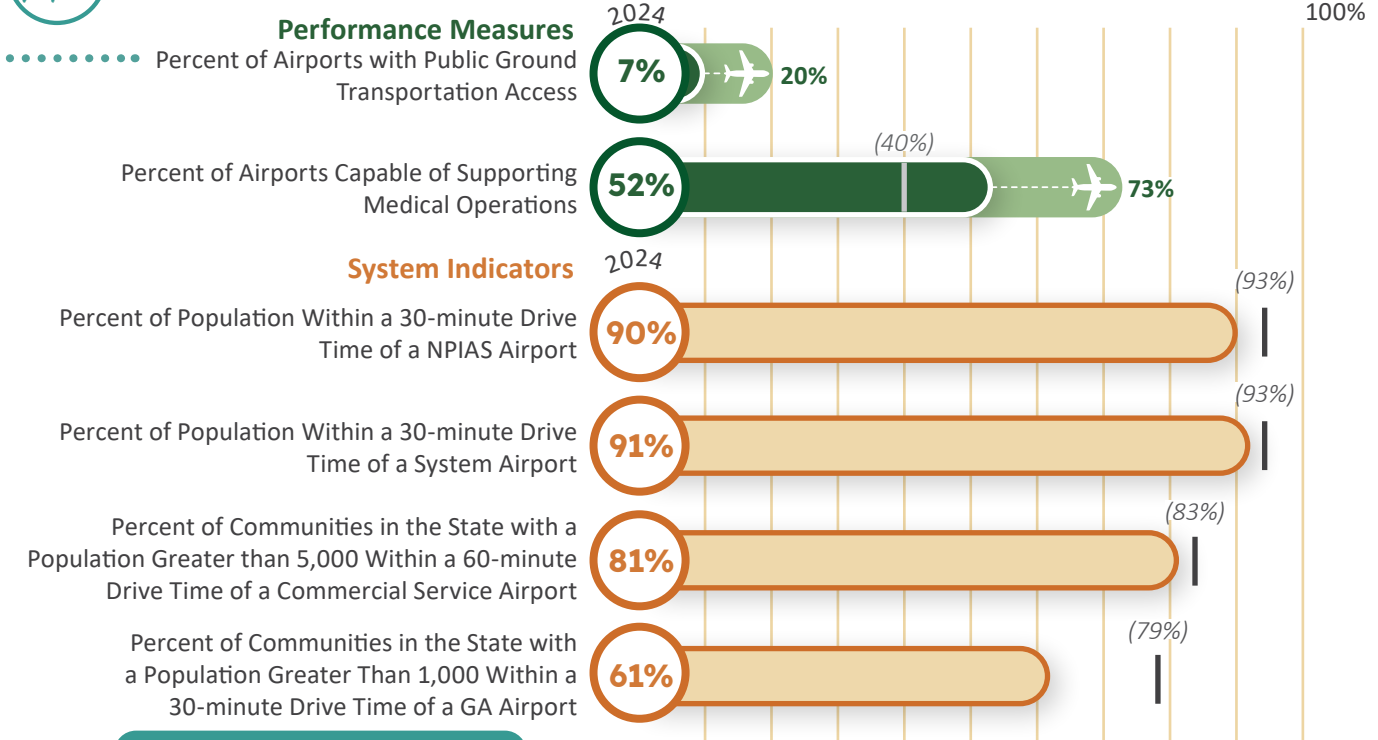


Actions to Improve Performance:

- ▲ ADOT should encourage airports to evaluate onsite energy generation opportunities.
- ▲ ADOT should consider making energy generation projects eligible for State-Local (SL) grants and assess future energy needs through the AAM System Plan.
- ▲ ADOT should also consider reinstating the Airport Loan Program to help fund revenue-generating energy infrastructure projects.



Goal: Support Equitable Access

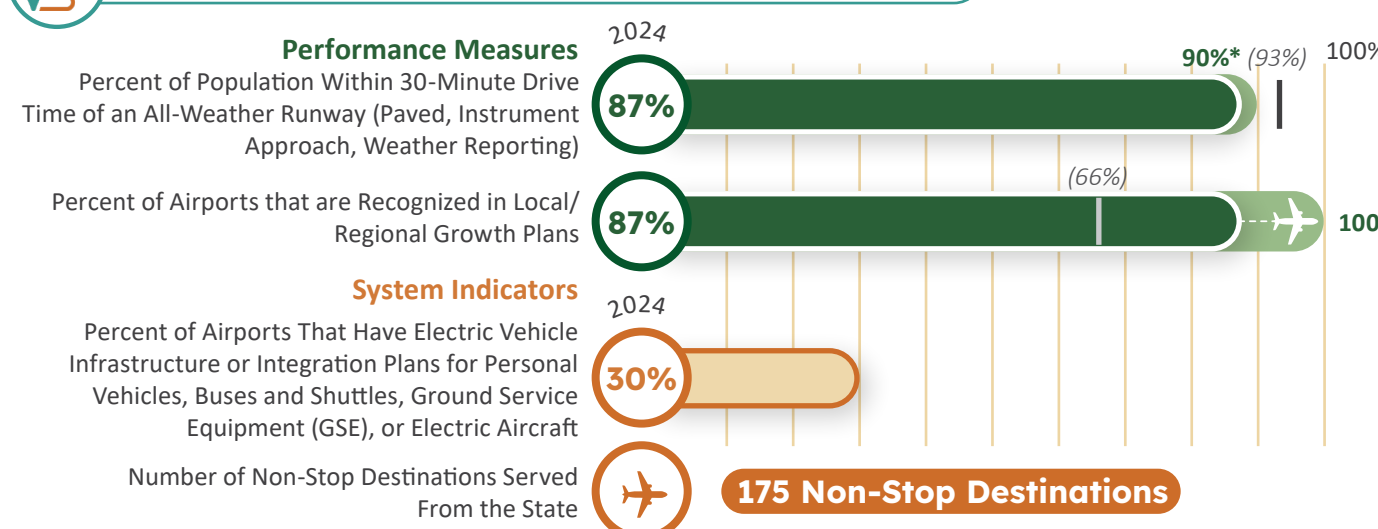


Actions to Improve Performance:

- ▲ Airports should work with local transit providers to expand public transportation access.
- ▲ Airport sponsors can increase their participation in MPOs and government organizations to better integrate airports into regional multimodal transportation networks.
- ▲ ADOT should also support planning efforts to incorporate airports into existing transit systems.



Goal: Improve Mobility, Reliability, and Accessibility



Actions to Improve Performance:

- ▲ Airports should meet their Facility and Service Objectives (FSOs) set for the 2026 SASP role classifications.
- ▲ ADOT should monitor population changes to align the distribution of all-weather runways.

*Due to demographic shifts in the state the goal for Percent of Population Within 30-Minute Drive Time of an All-Weather Runway has been decreased to 90%

Facility and Service Objectives

FSOs provide recommended guidelines for the facilities, infrastructure, and services that airports should have to effectively support their role within Arizona’s aviation system. While FSOs are not mandatory requirements, they help evaluate how well airports are positioned to meet current and future aviation demand, enhance safety, and provide reliable service to users. The 25 FSO categories assessed in the 2026 SASP are shown below and serve as a framework for identifying strengths, gaps, and opportunities for future investment.



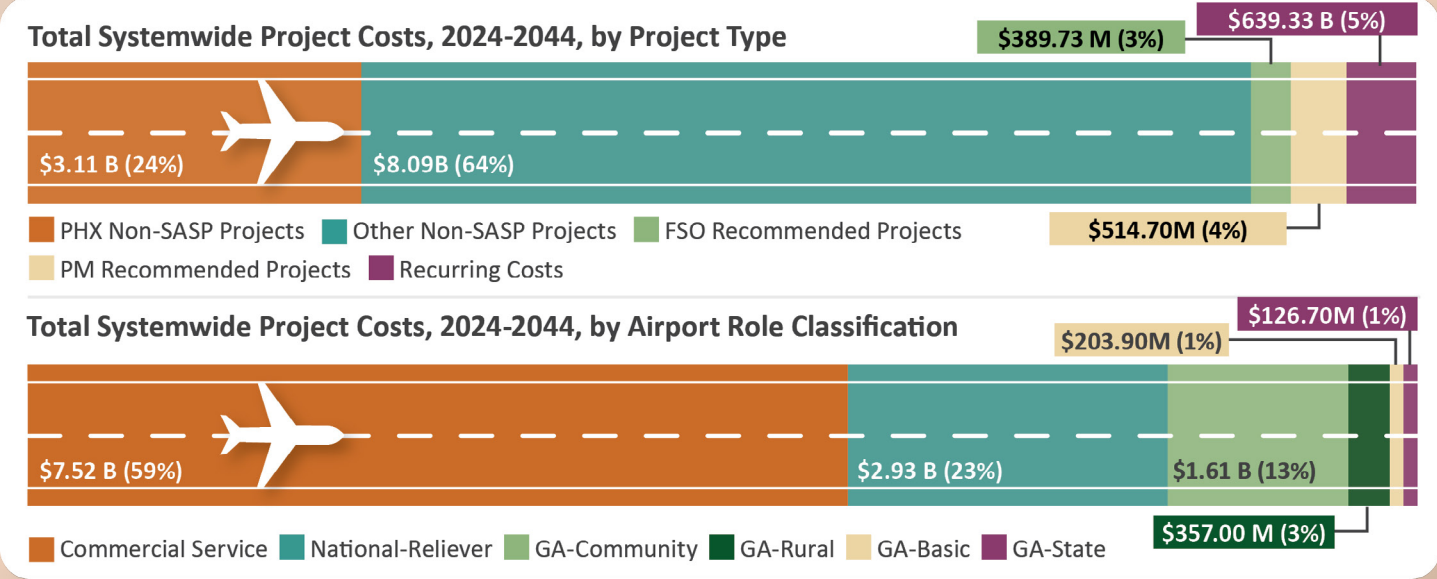
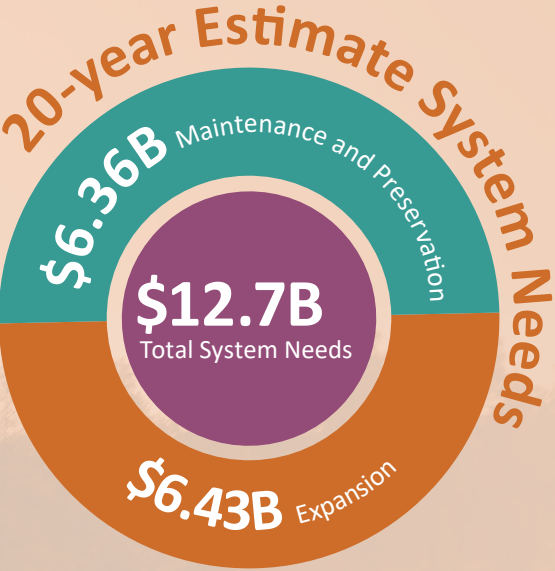
Investment Needs

Investment needs represent the projects and actions required to maintain and improve Arizona’s aviation system over the next 20 years, supporting the seven goals of the SASP. Actions identified to improve performance in 16 PMs and meet targets in 25 FSOs were correlated with airport improvement project costs to estimate the systemwide investment required to fulfill the goals of the 2026 SASP. In addition to needs identified through the SASP, Airport Capital Improvement Programs (ACIPs) were reviewed to identify additional non-SASP projects, representing other improvements that are needed at individual facilities that do not relate directly to SASP goals. Finally, recurring costs were estimated to represent projects needed to maintain the efficacy of the existing system into the future.

Meeting future aviation demand will require significant investment to maintain and enhance Arizona’s airport system. Over the 20-year planning period, total system needs are estimated at more than \$12.74 billion. However, available funding over the same time is projected to only reach \$3.5 billion, resulting in a substantial funding shortfall of \$9.3 billion over the 20-year period. This gap highlights the challenge ADOT faces in prioritizing investments, as funding must be strategically allocated between preserving current assets and supporting expansion projects.

Non-SASP projects are expected to account for the largest portion of systemwide needs, with Phoenix-Sky Harbor International (PHX) needing approximately \$3.1 billion and the remainder of the system \$8.1 billion to fulfill non-SASP project needs. Approximately \$904.4 million is necessary to meet the PM and FSO targets established in the 2026 SASP.

Commercial Service airports account for the largest share of identified project needs amongst the six 2026 SASP airport role classifications, with a decreasing share of needs among the other roles, with GA-State airports requiring the smallest share.



Economic Impact Vs. Funding Needs

Arizona’s aviation system is a major economic driver, supporting more than **386,000 jobs** and generating nearly **\$59.4 billion in economic activity (output)** annually. According to the 2021 Arizona Aviation Economic Impact Study, the industry also produces over **\$20.3 billion in annual earnings** and **\$3.5 billion in yearly tax revenues statewide**. Comparatively, the airport system will require only **\$634.1 million of funding per year** to meet its goals, showing that continued investment in airports is vital to the long-term prosperity of Arizona’s residents and businesses.

Recommendations

As a long-term planning document, a significant aspect of the 2026 SASP identifies a series of recommendations aimed at airports, ADOT, and the Arizona State Transportation Board (STB) to help achieve the 2026 SASP’s goals. These recommendations range from improvement projects at airports not meeting PM targets to special ADOT studies investigating systemwide issues and changes to ADOT and STB policies affecting airport funding allocations.

PM Recommendations and Special Studies

To meet the PM and FSO targets identified in the performance evaluation, it is recommended that ADOT supports airports as they aim to complete the projects associated with actions to improve performance. Some PMs have wider implications that extend beyond individual airports and are therefore better suited for ADOT to support or evaluate at a statewide level. As such, it is recommended that ADOT conduct the following special studies and initiatives:



Demand/Capacity Study

Conduct detailed capacity analyses for airports and regions with projected capacity constraints to identify infrastructure improvements and potential new facilities needed to accommodate future demand.



Advanced Air Mobility (AAM) System Plan

Evaluate airport readiness for eVTOL aircraft and other AAM technologies, including identifying potential vertiport locations, energy requirements, and airspace needs to support future AAM implementation.



Multimodal Integration Study

Assess airports’ roles in Arizona’s multimodal transportation network as AAM becomes more relevant and develop strategies that improve connectivity and enhance statewide mobility.



Arizona Airports Economic Impact and Economic Development Study

Update the statewide aviation economic impact analysis and identify opportunities for airports to support economic development, business growth, and job creation.



Obstruction Mitigation Program Study

Develop a statewide program to identify and introduce strategies to mitigate airspace obstructions near airports, improving approach clearances and enhancing operational safety across the state system.



Airport Pavement Management System (APMS) Triennial Pavement Study

Continue monitoring pavement conditions through regular APMS evaluations and prioritize maintenance and rehabilitation projects to preserve pavement assets and reduce long-term costs.



Statewide GA Wildlife Hazard Assessment (WHA) Study

Develop statewide guidance for GA airports to address wildlife hazards and provide templates for WHAs and Wildlife Hazard Management Plans (WHMPs) at GA airports to reduce wildlife strike risks and improve airport safety.

Policy Recommendations

While project and special study recommendations were identified using the results of the PM and FSO analyses, policy considerations were developed through coordination with ADOT and the PAC. These considerations were developed to provide airport sponsors and/or ADOT with action items that, when implemented, may contribute to a more optimized aviation system.



STB Policy Recommendations

- Update STB Policy to align with the seven goals and six airport role classifications established in the 2026 SASP and ensure future funding decisions support statewide aviation system priorities.
- Update STB Policy #38 regarding State-Local (SL) Airport Development Grant Program and APMS matching percentage policies to align with the airport roles established in the 2026 SASP. As part of this update, ADOT should consider providing a 95% state match for GA-State airports, recognizing that many of these airports were previously classified as GA-Basic and may have similar funding needs and financial constraints.
- The STB should establish a dedicated funding set-aside for GA-State airports to provide a consistent and reliable source of funding for infrastructure preservation and improvement projects. Because GA-State airports are not eligible for FAA AIP funding, a set-aside would increase their ability to secure critical funding and complete needed projects that support the long-term viability of these airports.



Airport Development Guideline Recommendations

ADOT uses the Airport Development Guidelines to administer the programs outlined in the STB policy and distribute money from the State Aviation Fund to airports. The 2026 SASP recommends the following changes to the Guidelines.

SL Development Grant Program Fund Allocation

ADOT should revise the SL Development Grant allocation percentages to prioritize investment in maintaining essential facilities and critical infrastructure. Small GA airports (GA-Community and below) often struggle to fund infrastructure preservation projects, so increasing funding through the SL Development program would improve systemwide sustainability and resilience.

Separate Priority Value Systems for Small and Large Airports

ADOT should develop separate project component value systems for Commercial Service and National-Reliever airports vs. GA airports to better align funding decisions with the unique needs of large and small airports. Project priorities should support financial and operational growth at Commercial Service and National-Reliever airports while emphasizing infrastructure preservation and safety improvements at GA airports.

Preferential Scoring for Phased Project Implementation

The rating process should encourage phased project implementation by giving preference to subsequent phases of ongoing projects, helping ensure continuity and successful project completion.



Other Policy Recommendations

Airport Loan Program

ADOT should consider restarting the Airport Loan Program, only when the State Aviation Fund reaches and maintains a stable balance sufficient to fully support both the current funding programs (FSL, SL, and APMS) and loan program activities. Reestablishing the program under these conditions would provide airports with access to financing for revenue-generating projects, such as hangar and fuel facility development, that are typically not eligible for FAA or ADOT grant funding.

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