



April 16, 2024

Meeting with:

Parkland County Council



BOARD GOVERNANCE

Edmonton Airports recently welcomed a new board chair and 2 new members



Carman McNary

City of
Edmonton

Board Chair



Rob Bennett

Parkland
County



Angelina Bakshi

City of Edmonton



Angela Fong

Strathcona County



Bernie Kollman (new)

Government of Canada



Christopher Burrows

City of Edmonton



Dave Mowatt

Government of Canada



Elan MacDonald (new)

City of Edmonton



Greg Krischke

City of Leduc



Howard Eng

Director at Large



Dr. Katherine Chubbs

City of Edmonton



Mona Hale

City of Edmonton

*Chair, Audit
Committee*



Sandra Marocco

Sturgeon County

*Chair, Governance and Human
Resources Committee*



Tim Hofstra

Leduc County



OUR VISION

*More Flights to
More Places*

NOBLE CAUSE

Uniting people for a world of new possibilities

MISSION

Driving our region's economic prosperity through aviation and commercial development

CORE VALUES

Safety and Security First

Do the Right Things Right

Dedicated to Sustainability

Own the Outcome

Invested in our Talent

An aerial photograph of an airport terminal and its surrounding parking lot. The terminal is a large, modern building with a curved design. The parking lot is filled with many cars, mostly white. The airport is surrounded by green fields and a runway is visible in the background.

WE'RE BETTER TOGETHER

Acting regionally to support global ambition has had an enormously positive impact on YEG



Critical support on development of air service



Land use planning supports sustainable growth



Holistic approach to preparing for the future

- This has unlocked the true potential of YEG
- \$1.5 billion in investment since 2018
- Now offering more flights than ever before
- Driving economic diversification and opportunity for the region as whole





More than 50
non-stop destinations

7.5 Million
PASSENGERS SERVED

28.2% increase
over 2022



118K
aircraft
movements



Reached more than 90%
of pre-pandemic passenger volumes



Economic Output: **\$4.9 billion**
Supporting **21,000** jobs

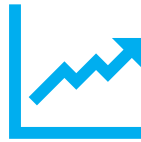
 **2023**



EDMONTON AIRPORTS PRIORITIES



Retain and Grow Passengers & Cargo



Grow Non-Aeronautical Revenue



Create an Exceptional Passenger Experience



Positive Impact Through Sustainability & ESG



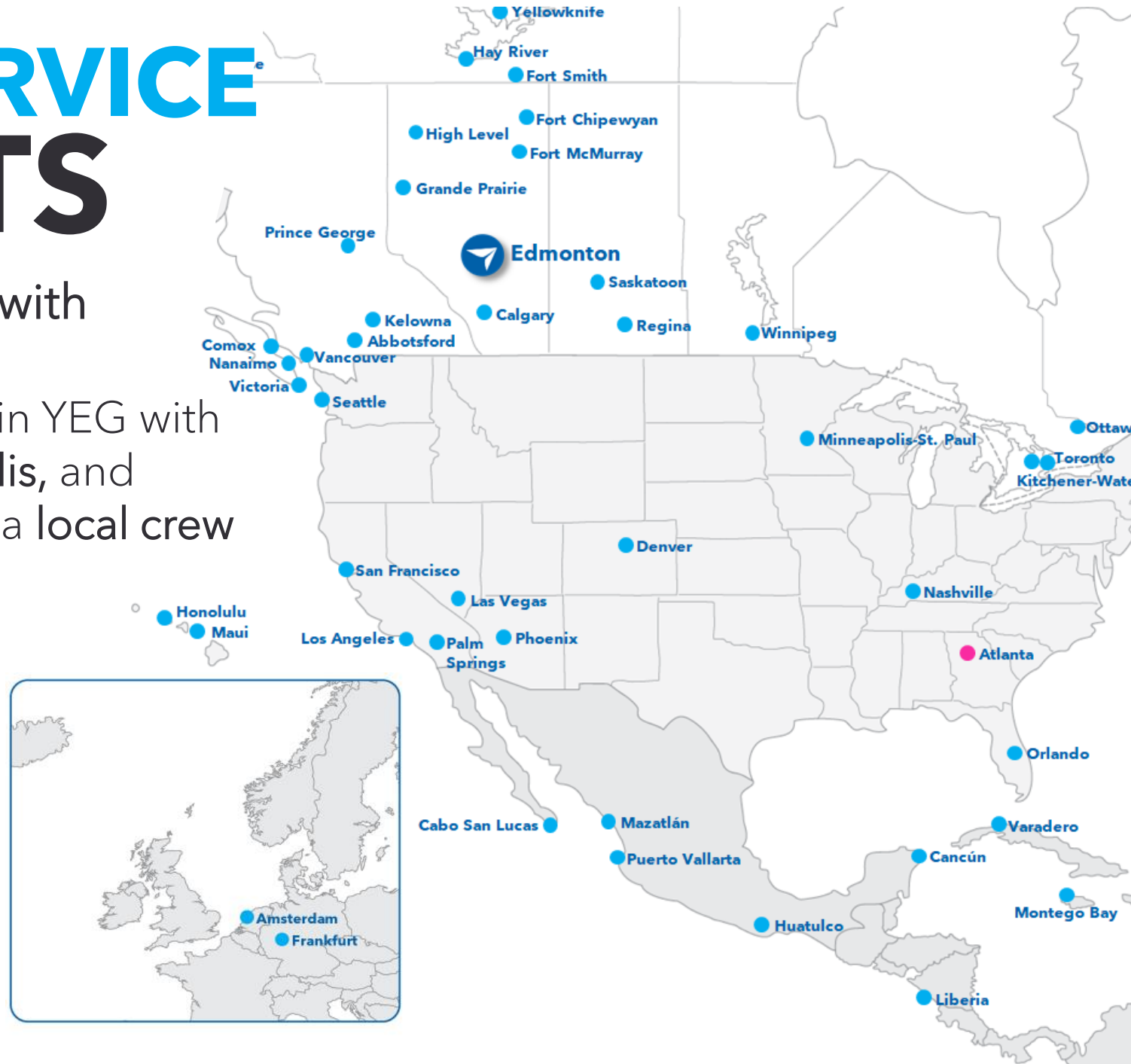
Team Member Success



RECENT AIR SERVICE HIGHLIGHTS

Strong travel demand continued with increased capacity in our market

- WestJet's largest-ever expansion in YEG with new service to **Atlanta**, **Minneapolis**, and **Seattle**, and the reintroduction of a **local crew**
- **Strong demand** on Air Canada's daily service to **San Francisco**
- Condor launched **Frankfurt**
- Porter launched **Toronto**, **Ottawa** and announced **Montreal**
- KLM added a **4th weekly** summer flight to **Amsterdam** and a **larger aircraft** for its winter season



FLYING NON-STOP MATTERS

Using YEG's 50+ non-stop routes is the best way to tell airlines we want more

- Every seat matters
- Your fare class matters
- Airlines use this data to determine the viability of new destinations
- Your collective support has an impact
- We want to hear from you



REGIONAL AIR SERVICE OPPORTUNITIES FUND

YEG's post-pandemic air service recovery was accelerated thanks our region

- A \$15 million RASOF fund raised in 2022 helped attract one international, two US and new domestic routes
- The investment was leveraged to generate significantly higher returns for the region
- This model helps ensure there are not long-term subsidies on new air service and promotes competition in the marketplace
- More support in this form will yield impactful growth



AIR CARGO PERFORMANCE

Three years of record cargo growth followed by a reduction in 2023 with global industry softening which was less pronounced at YEG

 \$604 million in annual economic output

 2,391 jobs supported in the region

FY 2023 Cargo Tonnage **-12.1%**

- 2022 +7%
- 2021 +5%
- 2020 +8%

FY 2022 Freight Tonnage **-15.5%**

- 2022 +11%
- 2021 +6%
- 2020 +15%

AIR CANADA
CARGO

CANADIAN NORTH
Fly the Arctic

amazon

KOREAN AIR
CARGO

CARGOJET

AIRFRANCE / KLM
Martinair CARGO

DELTA
CARGO

Lufthansa Cargo

NCA
Nippon Cargo Airlines

Alaska
AIR CARGO

DHL

UNITED

Buffalo

FedEx

WESTJET
CARGO



AIRPORT CITY SUSTAINABILITY CAMPUS

Supporting innovation to grow our environmental and social impact and unlock new opportunities

- Leveraging developable land to drive investment and job creation
- Enhancing the Edmonton clean-energy story through valuable aviation applications

INTERNATIONAL CARGO HUB

Unlocking 2000+ acres in new development

- \$100M grant from the Government of Canada for a \$300M+ expansion
- The new 65 Ave interchange promotes efficiency
- Approval on the new 112MW Airport City Solar
- Multi-modal logistics hub enhanced by \$36 million in recent cargo upgrades



*CONCEPT RENDERING



2023 SUSTAINABILITY PARTNERSHIPS

Our dedication to sustainability is at the heart of everything we do:

- Airport City Solar, a 112 MW solar farm developed by Alpin Sun - Alberta Utility Commission approval March 20, 2024
- Alberta's first fleet of zero-emission hydrogen fuel cell electric vehicles (FCEVs)
- Two MOU's on Sustainable Aviation Fuel (SAF) development
- MOU with Montana First Nation, to explore meaningful ways to advance development and reconciliation.
- Canadian Green Shipping Corridors MOU at COP28 with DP World, UAE, Korea, Japan, Canada, CN Rail, Port of Prince Rupert and YEG.





PASSENGER EXPERIENCE

Enhancing journeys with a centralized restructuring focused on passengers

- Daily focus on continual improvement and service excellence
- Appointment of new VP of Terminal Operations and Passenger Experience, Carmen Donnelly

AIRPORT INFRASTRUCTURE

Investing in the long-term planning needed for future generations of YEG travelers

- Construction and reopening plans underway on the Departures Level roadway revitalization
- Appointment of new VP of Infrastructure, Facilities and Airside Operations, Peter Agnew





MASTER PLAN 2048

Our refreshed Master Plan looks well into the future, collaboratively charting the course for growth

- Considers the necessary infrastructure enhancements to serve Edmonton passengers and cargo companies for **generations to come**
- **Long-term planning** includes provisions for terminal and runway **expansions**, utility corridors, and responsible **land use planning**
- **Regional alignment** on these long-term priorities is critical to **long-term success**



GENERAL AVIATION & FLIGHT TRAINING



58,752 aircraft movements in 2022



\$74.6 million in annual economic output



25 various tenants supporting 292 direct jobs

ZVL supports YEG and the Edmonton Metro Region by providing capacity for:

- General aviation services for small fixed or rotary-wing aircraft
- Alternate space for air ambulance operations
- Flight training
- Compatible aircraft maintenance
- Drone innovation and development



STURGEON COUNTY



VILLENEUVE AIRPORT STRATEGIC PLAN

We are encouraged by Sturgeon County's ambition and shared support for Villeneuve Airport

- A refreshed Strategic Plan lists the priority areas for investment to grow the regional asset



Improve financial sustainability



Grow aviation traffic



Grow flight training



Increase non-aeronautical revenues

- Regional alignment on these priorities is critical to the long-term success of YEG and ZVL



STURGEON COUNTY



THINKING LOCALLY ACTING GLOBALLY

Our collaborative relationship is driving growth, innovation and diversification:

- Tell policymakers that **attracting growth and investment requires robust air service** in the Edmonton Metropolitan Region
- How can we **grow transit, utilities, infrastructure, and clean energy** demand together?
- Please tell exporters in your network to get in touch – we want to help **serve them even better**
- Encourage entrepreneurs to think big and to act bold, with a **supportive ecosystem approach**





COMMUNITY IMPACT

We want to prioritize the organizations that matter to you and support our community

- The YEG Charity Golf Classic has surpassed \$1.3 million raised for local organizations
- We want to hear from you: How can we increase our community impact in Parkland County?





YEG

EDMONTON
INTERNATIONAL
AIRPORT

AÉROPORT
INTERNATIONAL
D'EDMONTON