METROPOLITAN WASHINGTON AIRPORTS AUTHORITY

The Washington DC Air Service Update

Issue #4

March 2nd 2026





Welcome to the 2025 summary issue of the Washington DC Air Service Development Newsletter. The Decade of Dulles continues with another record-breaking year for Washington Dulles International Airport. A total of 29.1 million passengers passed through the airport in 2025, representing a 6.4% year-over-year increase. More than 36% of those passengers or 10.53 million were international representing one the highest shares of international passengers for the entire United States. EVA Air has announced new nonstop service between Taiwan Taoyuan International Airport and Washington Dulles International Airport. Brian D'Amico takes a deeper dive into the efforts to secure this new air service win. In this issue Scott Cooper takes a look at the 2025 domestic market growth and Thomas Reich takes a deep dive into local passenger trends for the National Capital Region. Ariana McKnire has an outlook on initial 2026 S/S26 demand.

Thank you to our airline and community partners for your continued investment in IAD.

Paul Bobson

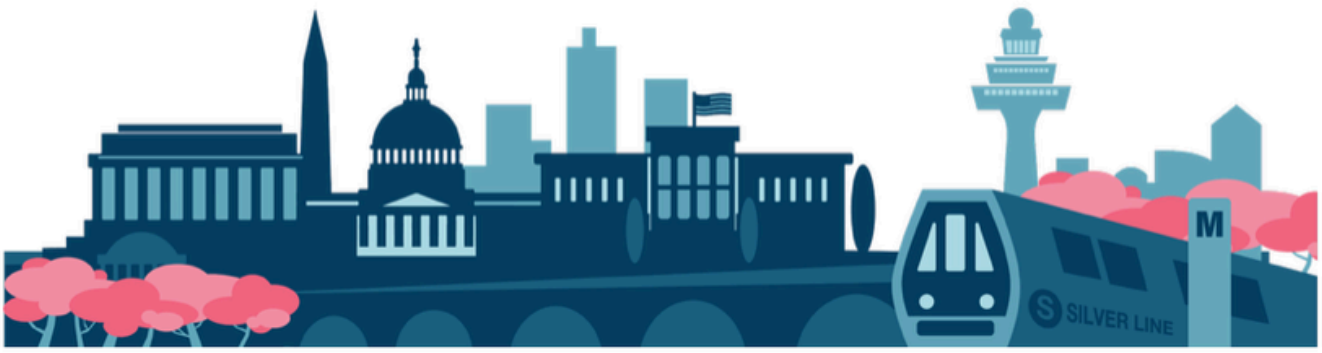
Vice President

Airline Business Development

The Decade of Dulles continues in Washington DC-



As 2025 came to a close, Washington DC's airport system notched another passenger record (54 million) while also marking the end of the third year of the "Decade of Dulles". The Decade of Dulles can be defined by the sustained market-driven growth and investment in the global gateway to Washington DC, Washington Dulles International Airport. The Decade of Dulles kicked off on November 17, 2022 with the 60th anniversary of Washington Dulles, the inaugural Washington DC to Cape Town service on United Airlines, and the arrival of the Metro Silver Line train to the airport. In 2023, Washington Dulles was named the fastest growing international hub airport in the United States for the first time. In 2024 the airport set a new passenger record and also welcomed a record number of new airlines and routes. In 2025, Washington Dulles was again named the fastest growing international hub airport in the United States and set a new all-time high passenger record at 29.01 million. The trajectory of the Decade of Dulles remains firmly upward as capacity, network depth and passenger enplanements continue to climb.



EVA Air Launches Nonstop Service between Taipei and Washington DC *By Brian D'Amico*



We are ecstatic to welcome EVA Air to IAD's growing airline family with 4x/week Boeing 787 service to Taipei beginning June 26, 2026. The new flight is Washington's first nonstop service to Taiwan and becomes the longest scheduled flight from Washington Dulles.

This announcement was years in the making, involving extensive collaboration with several stakeholders and comes just a few months after a historic agreement signed earlier last year.

On September 18, 2025, the Metropolitan Washington Airports Authority entered into a Memorandum of Understanding with the Taoyuan International Airport Corporation (TIAC) formalizing joint efforts to attract a nonstop flight between Washington Dulles International Airport and Taipei.

Until now, Washington, DC was the largest unserved origin and destination revenue market from Taipei in the world. With historically strong political ties and both long-standing and expanding business synergies in the defense and tech sectors, the demand for a nonstop link has never been higher.

At the MOU signing event in Taipei, high profile attendees included MWAA's Chief Revenue Officer Chryssa Westerlund, TIAC's Chairman Wei-Fuu Yang, American Institute in Taiwan's Commercial Section Chief Janée Pierre-Luis, and Taiwan Ministry of Transportation and Communication Administrative Deputy Minister, Kuo-Shian Lin.



Other attendees included representatives from all three Taipei-based airlines (EVA, Starlux and China Airlines), the American Chamber of Commerce in Taiwan, local media, and other travel industry partners.

For Taoyuan International Airport (TPE), Washington Dulles became its 17th sister airport in the world. And for Washington Dulles, TPE is the first such MOU that MWAA has struck for the expressed purpose of continuing collaboration towards a nonstop flight.

The signing and subsequent announcement mark a new era for Washington Dulles, already having been named the fastest growing international gateway in the US for two of the last three years, thanks to major service expansions domestically and to Europe, Africa and the Middle East. While our team continues to pursue more service to those regions, this MOU and EVA Air's entry into the market signifies MWAA's particular attention and focus on Asia.

Notably, the new service comes just ahead of the 250th anniversary of the United States in 2026, where Washington DC will be the epicenter of national celebrations. It also highlights the work and collaboration between MWAA and TIAC over the last two years which was formalized in this agreement and culminated by EVA Air's announcement.

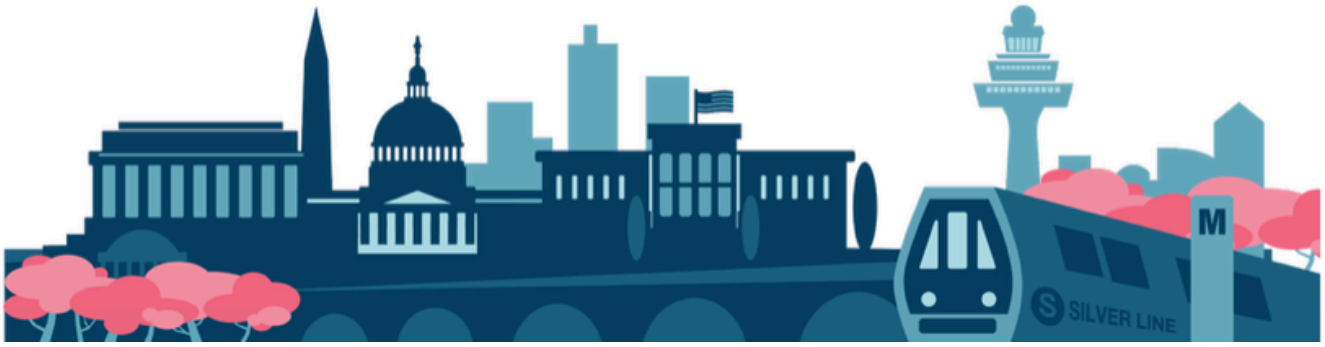
In addition to serving the local market, TPE serves as a major gateway to the rest of East and Southeast Asia, offering strategic connections to many top unserved markets from Washington including Bangkok, Ho Chi Mihn City and Singapore.

For the more than 320,000 residents in the National Capital Region who were born in East and Southeast Asia, EVA Air's IAD schedule enables dozens of new options for visiting friends and family.

We are extremely grateful to our friends at the Taoyuan International Airport Corporation for their partnership in helping get us to today's announcement, and we especially thank EVA Air for choosing IAD as their next North American gateway.

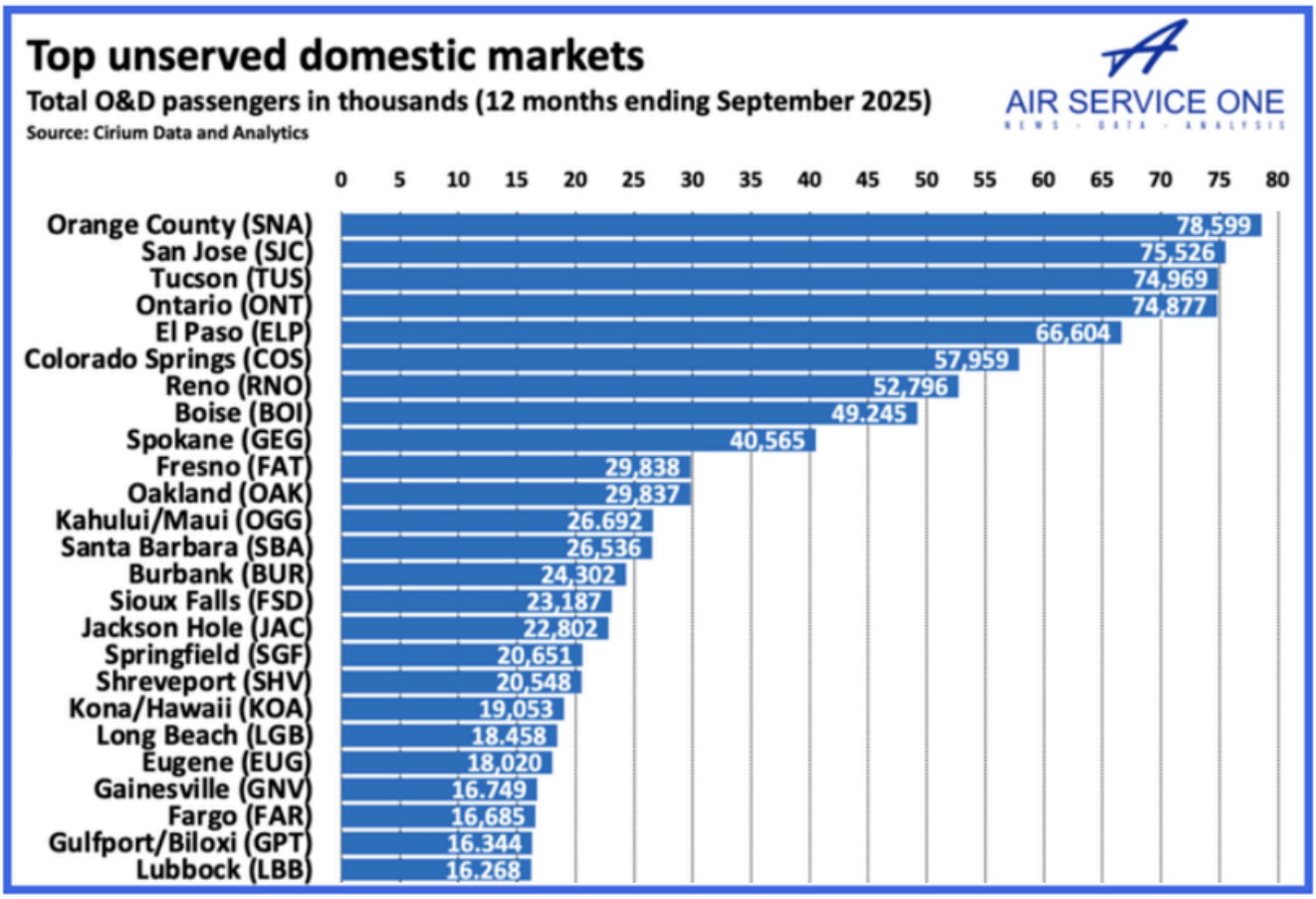


Brian D'Amico
ABD Director

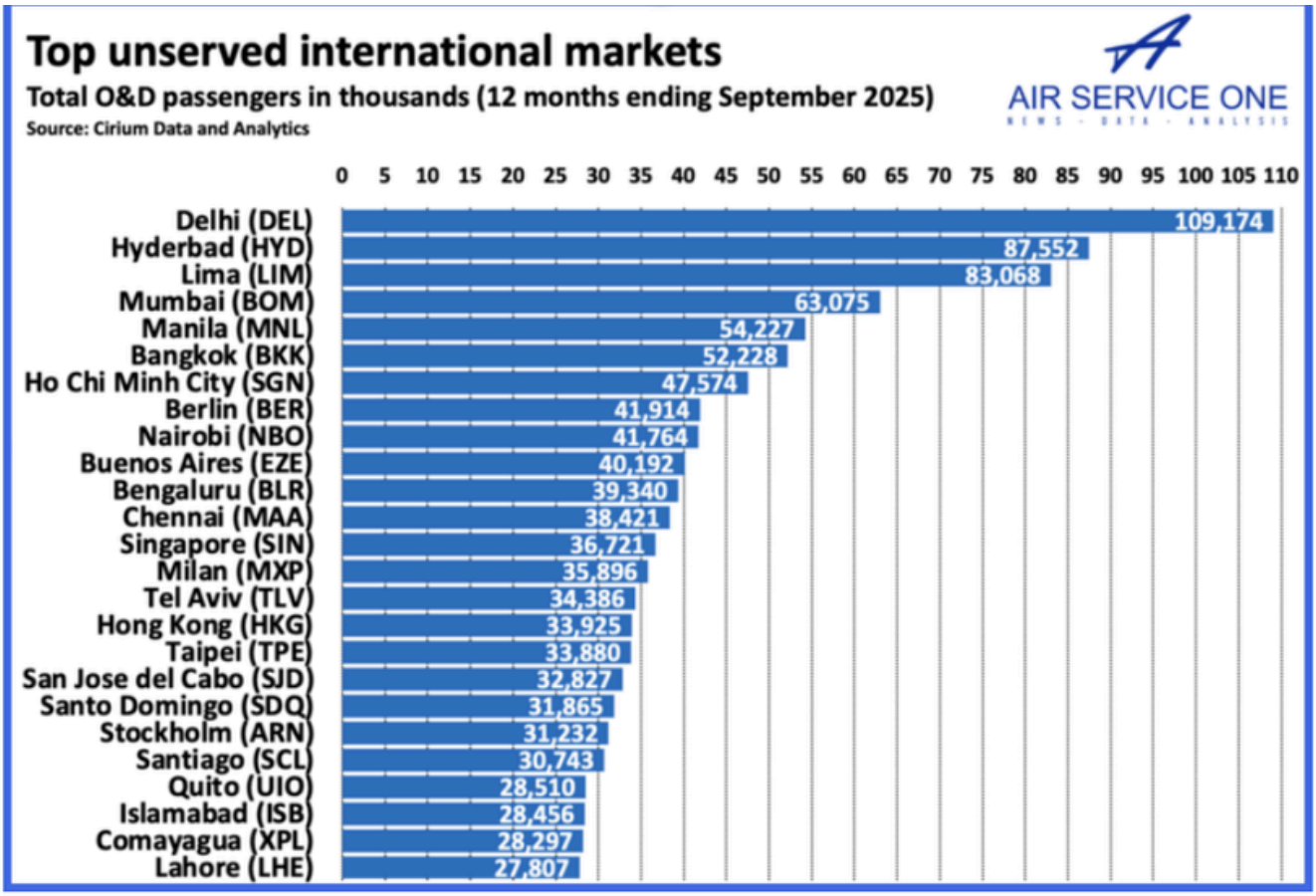


Washington Dulles International Increases Its Share of the Local Passenger Market *By Tom Reich*

Passenger numbers at Dulles International Airport continued to increase in 2025 as passenger numbers at Reagan National and BWI have both declined. The Office of Airline Business Development has analyzed passenger data of each of the three airports to understand exactly what is causing this shift in passengers.



The data used in the analysis shows passenger location by postal code, which provides a sense of where the passengers who use each of the local airports reside. When examining passenger data from BWI's primary catchment area, we find that 2.3% of passengers that reside in the BWI Catchment Area now choose to fly from Dulles international instead of using BWI or DCA. A similar trend appears when looking at the passenger data from Reagan National's primary catchment area. Here we find that 3.8% of the passengers that reside in the Reagan National Catchment Area now choose to use Dulles International instead of DCA or BWI. When looking at passenger data for those who reside in Dulles International's Catchment Area, we find that 1.3% more passengers are using Dulles International than were previously with 0.9% no longer driving to BWI and 0.4% no longer driving to Reagan National.



When all three catchment areas are combined Dulles International gains 1.9% of the total combined market share.

There are many forces that are driving this change in airport preference. From a Dulles perspective, United Airlines is growing in capacity. New destinations and larger aircraft equate to an 8.8% increase in scheduled seats. These seats are being filled by passengers who previously used DCA or BWI.

At BWI decreases in air service from the airport's largest carriers Southwest and Spirit coupled with exits from the market by airlines including Air Canada, Allegiant, Condor & JetBlue have left some passengers looking for other options and they have found those options at Dulles.



Tom Reich
ABD Director



Dynamic Airline Growth Fuels IAD's Domestic Expansion

By Scott Cooper

Washington Dulles International Airport (IAD) closed 2025 with a record number of Ultra Low-Cost Carrier (ULCC) enplanements and new domestic route offerings, marking a significant milestone in domestic growth. Frontier and Allegiant led the expansion with meaningful capacity additions, and momentum is expected to continue into 2026—beginning with the return of a former American Airlines route not served from IAD in several years.

From the Smokies to the Shoreline – New Routes Across the American Map

Last May, Allegiant launched new twice-weekly service from IAD to Fort Walton Beach, FL (VPS), Knoxville, TN (TYS), and Savannah, GA (SAV), followed shortly by the addition of Asheville, NC (AVL). During the same month, Frontier introduced new nonstop service to Dallas/Fort Worth, TX (DFW), Miami, FL (MIA), and San Juan, PR (SJU), further expanding low-fare options for travelers in the National Capital Region. These two ULCC's added over 600,000 seats to IAD from CY 2024 to CY 2025 and grew their enplanements over 75% between the same period.

Momentum That Extends Beyond U.S Borders

Following the peak summer travel season, Frontier and Breeze Airways added San Salvador, El Salvador (SAL) and Tri-Cities, TN (TRI), respectively, in December—putting an exclamation point on a remarkable year for domestic growth at Dulles. ULCC capacity additions in 2025 reached record levels for the airport, a notable achievement in a segment that has historically been underrepresented at IAD. Collectively, Allegiant and Frontier alone grew their IAD networks to 17 destinations in 2025, up from just eight the prior year.

Washington Dulles Cost Competitiveness Driving Carrier Growth

Several factors have driven this increased interest. Dulles' cost per enplanement (CPE) ended 2025 at just over $11—less than half that of major peer airports such as JFK, ORD, and LAX—supported by a strong non-aeronautical revenue mix approaching 60% of total airport revenue. In addition, comparatively high local airfares present clear opportunities for ULCCs to stimulate demand with lowered fares.

Coast-to-Coast Growth with Expanding Choices

This domestic growth extends beyond the ULCC segment. In April 2026, American Airlines will return to the Dulles–Los Angeles (LAX) market with daily Boeing 737-800 service, restoring a transcontinental route last operated in 2020. As we look ahead, we are encouraged by the strength and diversity of domestic growth at Dulles and see continued opportunities to expand choice, competition, and connectivity for our customers.



Scott Cooper
ABD Director



Premium Cabin Resilience Drives 2026 Outlook at Washington Dulles

By Ariana McKnire

Following a record-setting 2025, 2026 is shaping up to be a year of moderated but stable growth at Washington Dulles International Airport (IAD). While overall passenger bookings for the upcoming summer season are tracking closer to Summer 2024 levels — reflecting a normalization from the outsized demand surge seen in Summer 2025 — yield performance remains supported by continued strength in premium cabins.

At IAD, the most notable area of continued strength is the premium cabin segment. Bookings in international business class, premium economy, and domestic first class are pacing at — and in several long-haul markets exceeding — Summer 2025 levels. This resilience is particularly evident across key global regions that anchor Dulles' international portfolio: Asia, Europe, and Africa.

Across Asia, premium demand remains strong on long-haul services linking the National Capital Region with major economic and diplomatic centers. Corporate travel tied to government, defense, technology, and multinational institutions continues to support high-yield bookings. In Europe, where IAD maintains one of the most diverse transatlantic networks among U.S. gateways, premium cabins are benefiting from a sustained business and premium leisure demand. Meanwhile, service to Africa — for which IAD is the largest gateway from the Americas — is also seeing steady premium performance, reflecting the airport's role as a key U.S. gateway for diplomatic, development, and NGO-related travel flows.

As the market transitions to more sustainable growth, premium cabin resilience will be a defining factor in the 2026 outlook at Washington Dulles — particularly across Asia, Europe, and Africa — helping to anchor revenue performance while broader passenger demand normalizes. The regions concentration of multinational headquarters, premium leisure passengers and diplomatic travel provides structural insulation against volatility, positioning premium cabin strength as a key stabilizer of overall air service performance.



Ariana McKnire
ABD Director



Top Route Opportunities at IAD

As passenger enplanements continue to reach record levels, demand continues to grow for air service to Washington DC.

Top Unserved International Destinations by PDEW:

Delhi, India (150)

Hyderabad, India (120)

Lima, Peru (114)

Mumbai, India (86)

Manila, Philippines (74)

Bangkok, Thailand (72)

Top Unserved Domestic Destinations by PDEW:

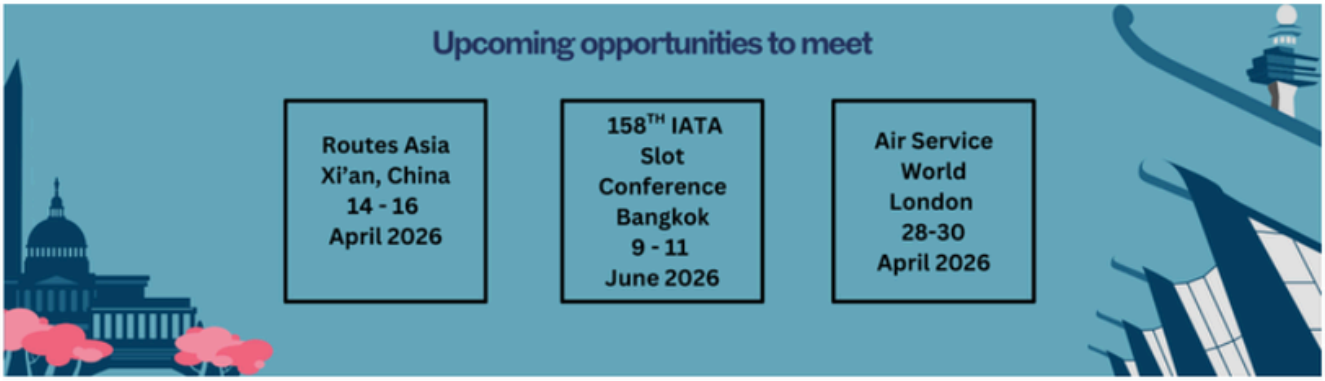
Ontario, California (108)

Tucson, Arizona (108)

El Paso, Texas (102)

Find more air service information for Washington DC **HERE!**





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