



HAS Presentation to Economic Development Committee

Jim Szczesniak, Director of Aviation

January 22, 2026



Agenda

- Review of 2025
- Infrastructure Project Updates: Terminal, Airfield, Restrooms,
- Parking and Ground Transportation Improvements



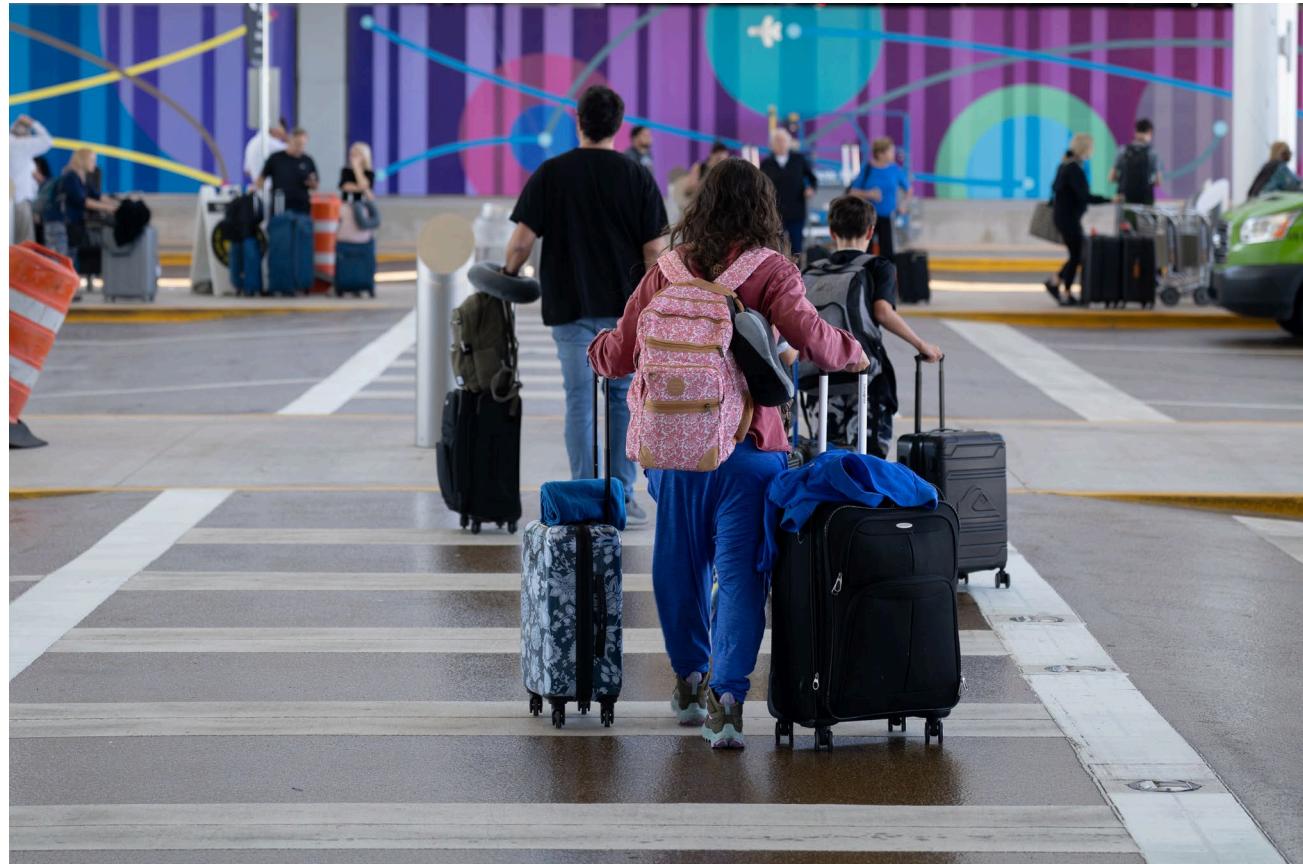
A Look at 2025

Strong International Growth. Record Cargo Performance.



2025 Passenger Totals

- 62 million passengers served
 - Down 1.6% from 2024
 - Domestic travel challenges
 - International travel continued to grow
 - IAH served 48 million, including 12.4 million international passengers
 - International growth up 2.5%
 - Overall passenger total down .7%
 - HOU served 14 million passengers
 - Down 4.6%





International Growth in 2025

1. **Tokyo – ZIPAIR at IAH**
2. **Monterrey, Mexico – Volaris at IAH**
3. **Puerto Escondido, Mexico – United Airlines at IAH**
4. **Monterrey, Mexico (additional flights) – VivaAerobus at IAH**
5. Seattle (reinstated) – Southwest Airlines at HOU
6. Salina, Kansas – United Airlines at IAH
7. **Edmonton, Canada (reinstated) – United Airlines at IAH**
8. Gulf Shores, Alabama – Allegiant Air at HOU
9. Wilmington, North Carolina – Avelo Airlines at HOU
10. Portland, Maine – United Airlines at IAH
11. **San Luis Potosí, Mexico – Volaris at IAH**
12. **Morelia, Mexico – Volaris at IAH**
13. New York–JFK – Delta Air Lines at IAH
14. **Tepic, Mexico – United Airlines at IAH**
15. **Guatemala City – Frontier Airlines at IAH**
16. **San Salvador – Frontier Airlines at IAH**
17. **San Pedro Sula – Frontier Airlines at IAH**



* International destination



2025 Cargo Totals



- 562,809 metric tons of cargo handled
 - Domestic and International cargo at IAH and HOU
 - New HAS Record, an increase of 1.9% from 2024
 - Increases in tonnage to/from the United Kingdom, Germany, Taiwan, Chile, Indonesia, Thailand, Turkey and Malaysia
 - Increased distribution point for cellphones, computers, computer chips, electronic components and semiconductors
- 51,416 metric tons handled at IAH and HOU in December
 - Second-best month ever for air cargo in Houston

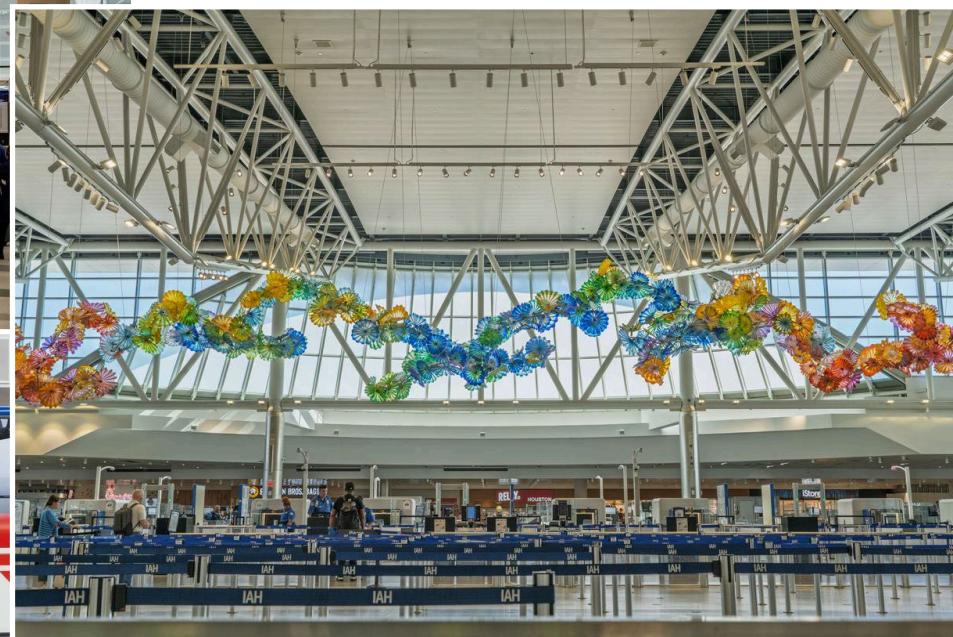
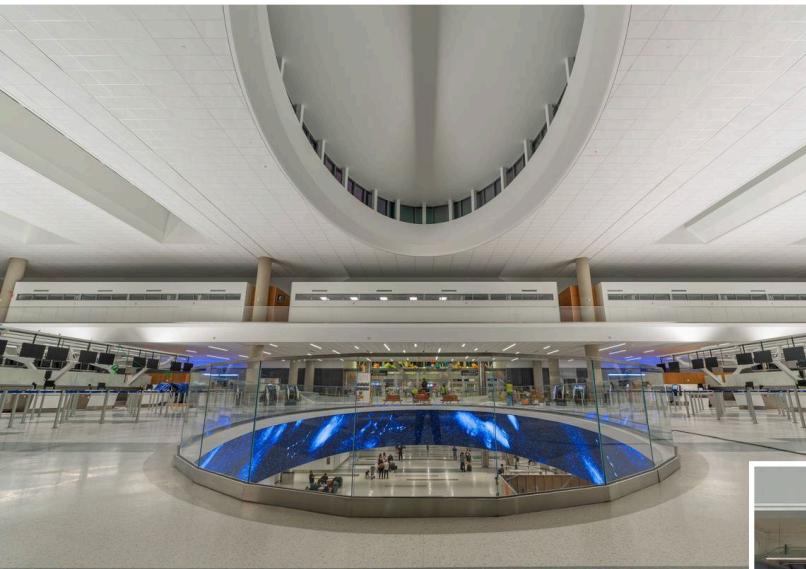


Terminal Improvements



IAH – International Terminal Redevelopment (ITRP)

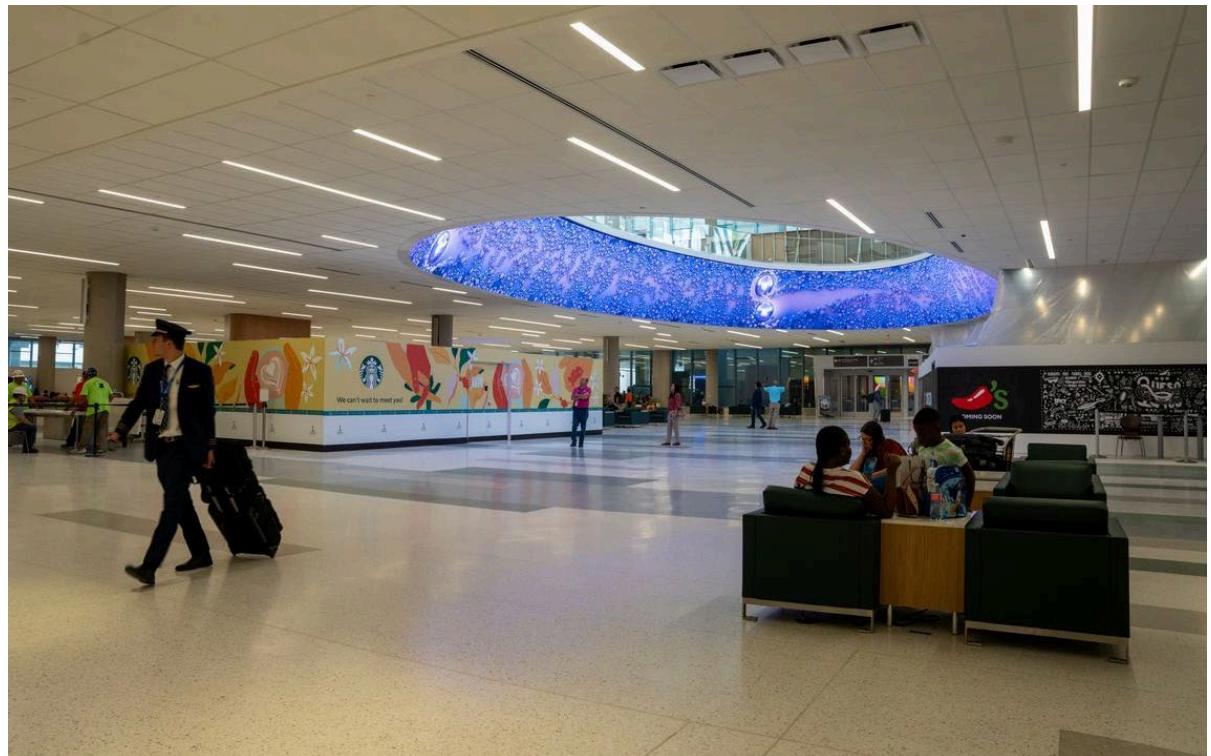
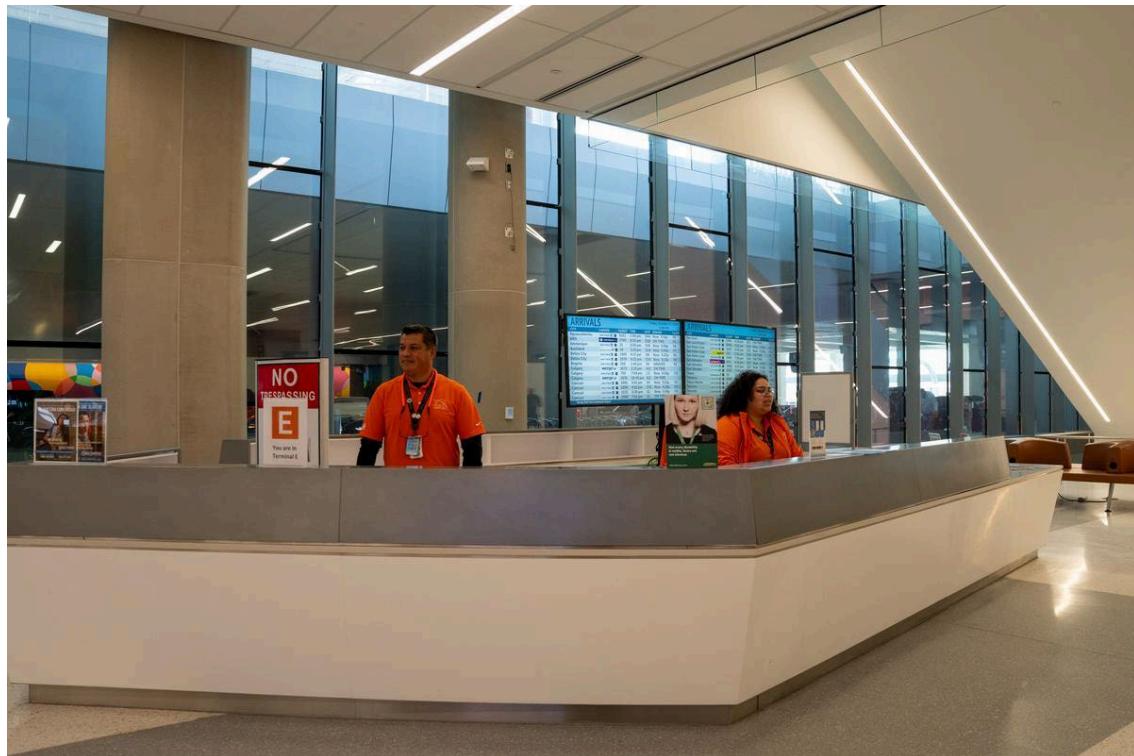
New International Ticketing Lobby (Terminal E)





IAH – International Terminal Redevelopment (ITRP)

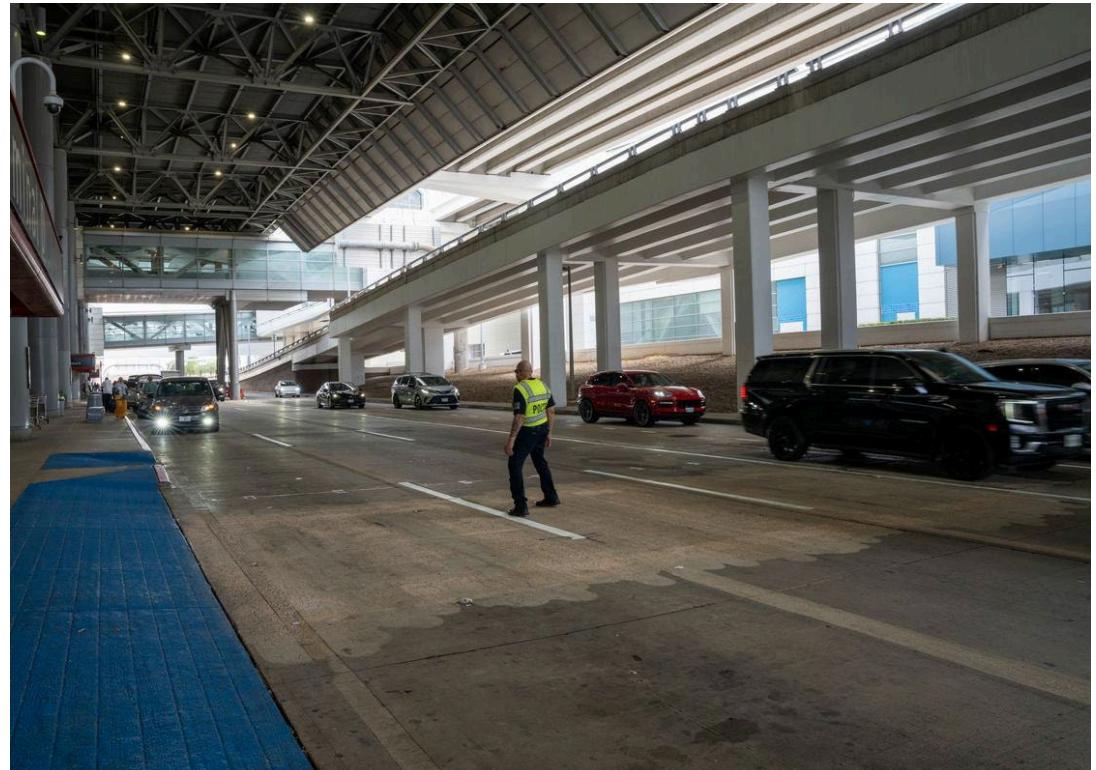
New International Arrivals Hall (Terminal E)





IAH – International Terminal Redevelopment (ITRP)

Removal of Construction Barriers at Terminal D





International Airlines to Move to ICP

- Foreign flag carriers need to transition operations from Terminal D to ICP
 - Move to happen Late February into March



Draft, deliberative material.



New Baggage Handling System

- Vendor installation and testing complete
- Third-party testing underway
- TSA testing in early February



Draft, deliberative material.





IAH – Terminal B

Significant Construction Progress on the Terminal Piers



May 2024

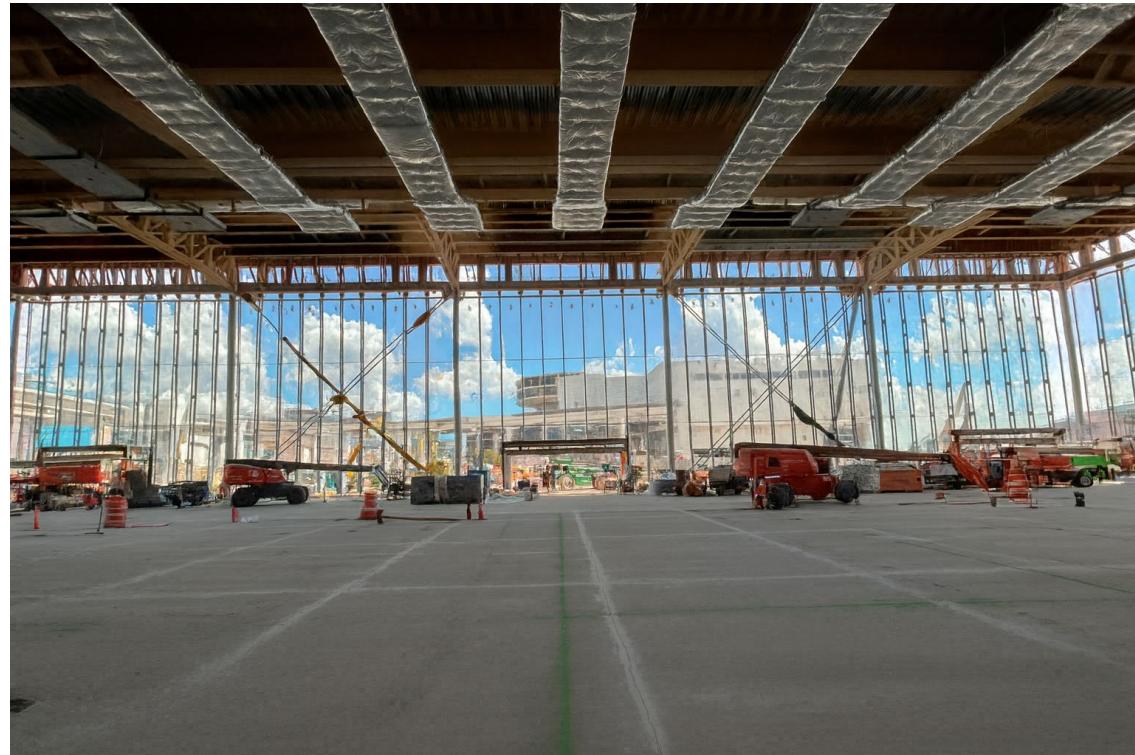


December 2025



IAH – Terminal B

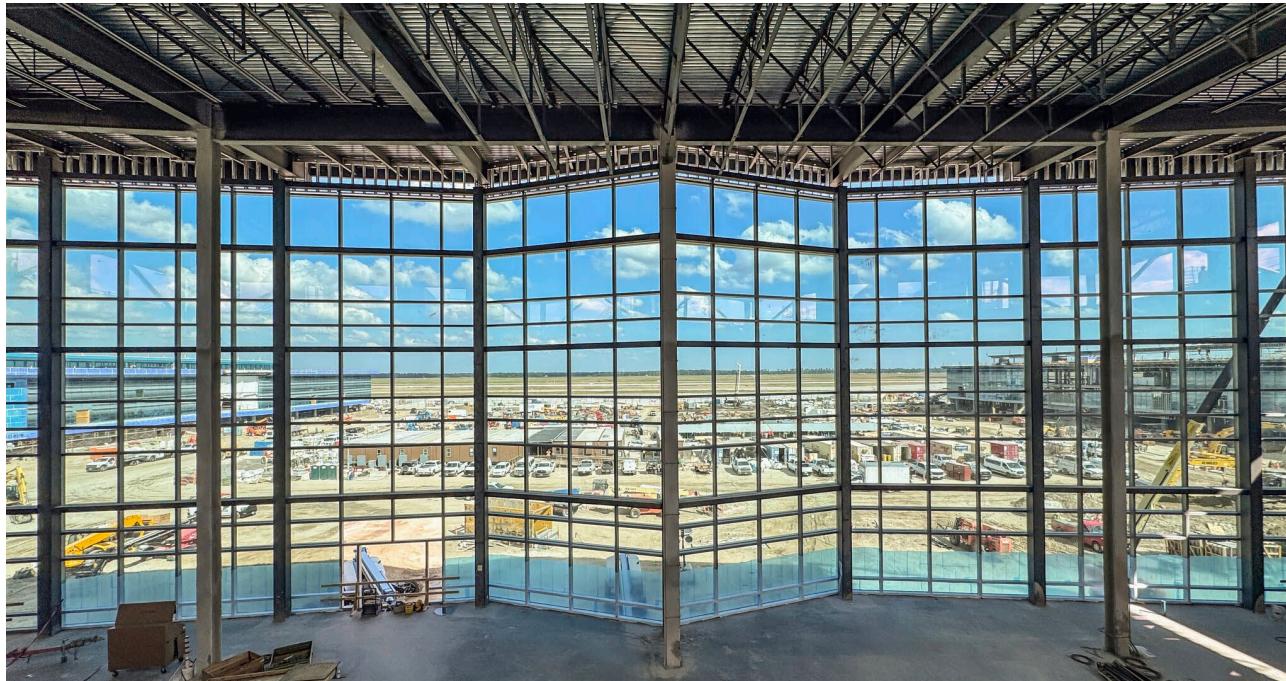
Processor Building Progress as of December 2025





IAH – Terminal B

Concourse Progress as of November 2025





HOU – West Concourse Expansion

Canopy Installation



Construction Progress



Architectural Rendering



HOU – West Concourse Expansion

Arrivals Level Updates

- New Baggage Carousels (3, 5 & 6)
 - Service Level Commitment: Throughout construction, a minimum of 4 carousels will always be in operation.
- New Inbound Baggage System
- New Restrooms



Draft, deliberative material.



New Women's Restroom

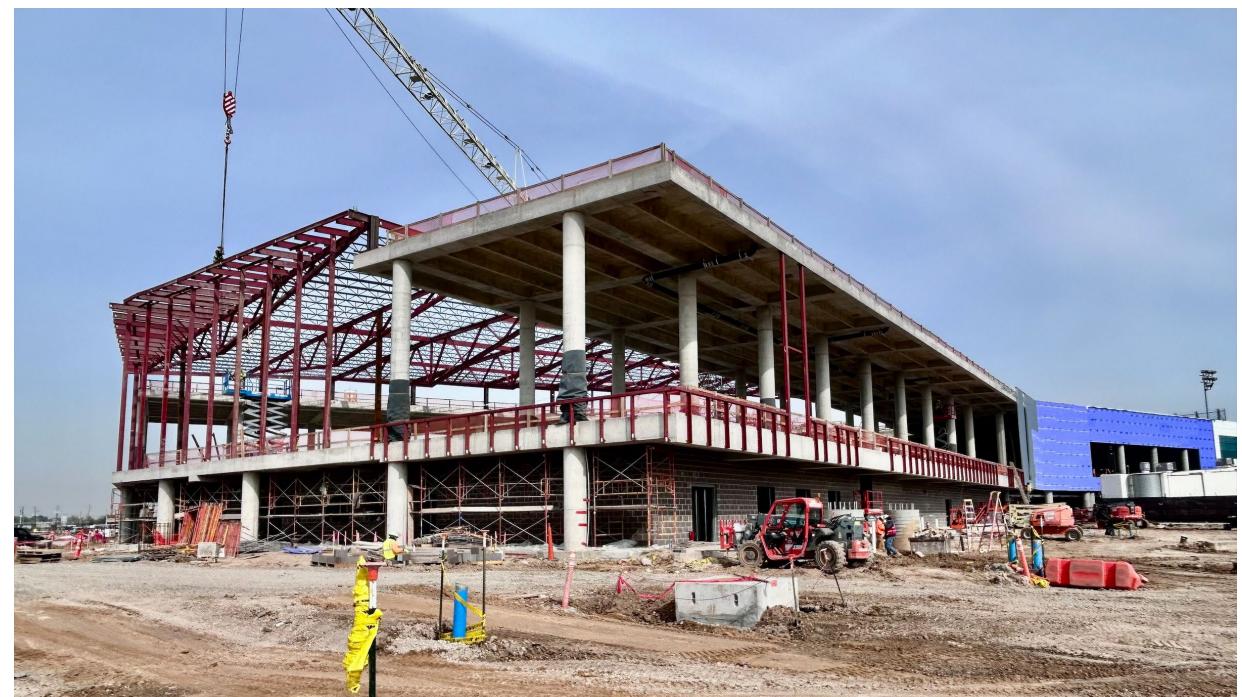


New Men's Restroom



HOU – West Concourse Expansion

Gate Construction



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Airfield Improvements



IAH – Runway Renovated



Draft, deliberative material.



IAH – Taxiway Renovations

Taxiway SB: Under Construction



Taxiway SA: Asphalt Resurfacing Complete





HOU – Runway Reopens



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Restroom Renovation Updates IAH & HOU



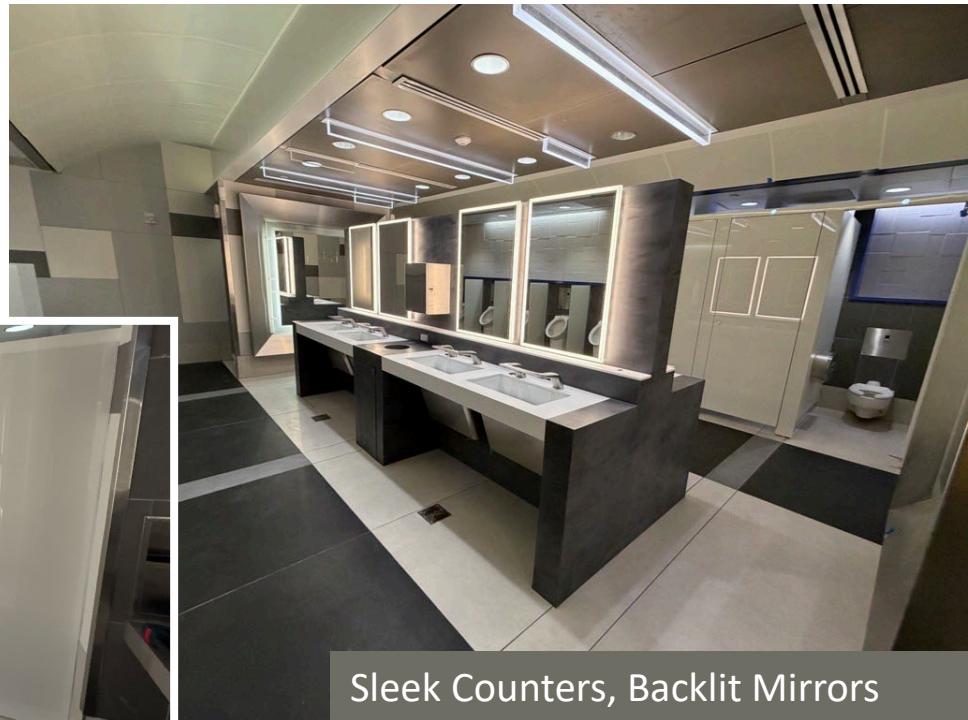
IAH/HOU – Restroom Renovations

\$30 Million Invested in Restroom Renovations at HOU and IAH Terminals A & D

- IAH Terminal A
- IAH Terminal D
 - 5 Restroom Sets
 - Mother's Room
- IAH Sterile Corridor (D)
 - 2 Restroom Sets
 - Family Restroom
- HOU
 - 2 Restroom Sets (1Q2026)



Full-Length Doors & Occupancy Sensors



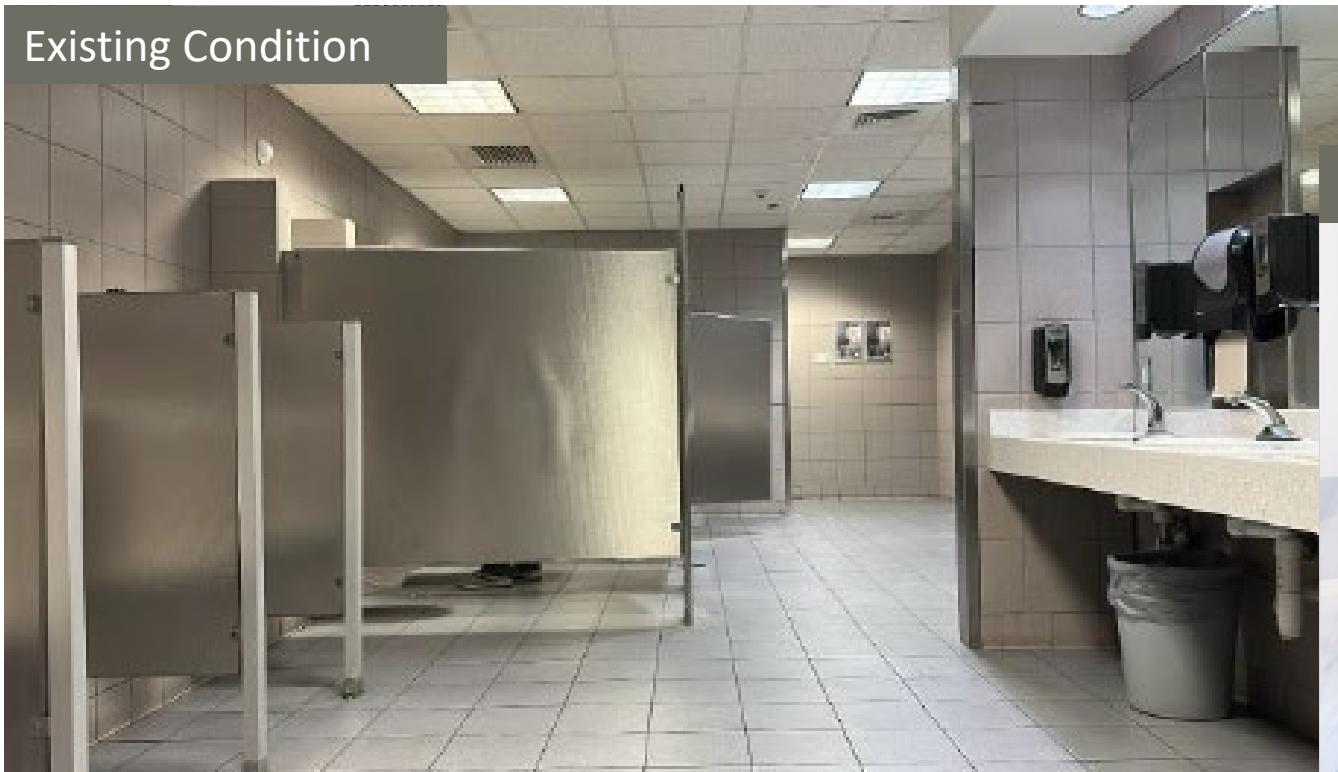
Sleek Counters, Backlit Mirrors



IAH– Restroom Renovations

United Airlines Restroom Renovations in IAH Terminals C & E

Existing Condition



Preliminary Design

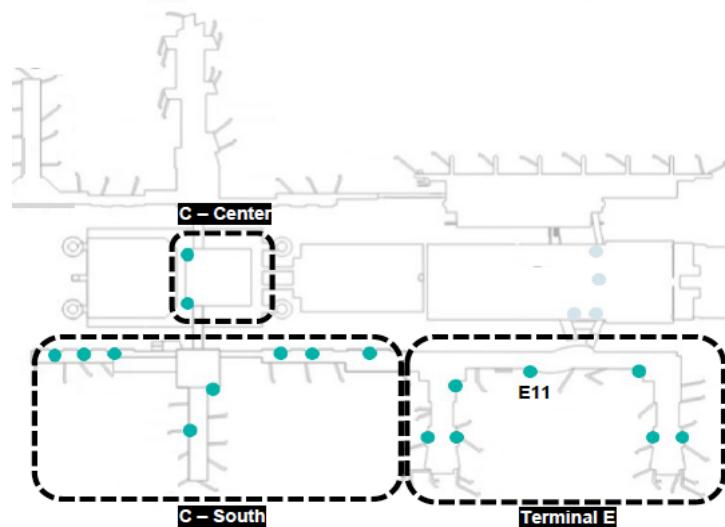




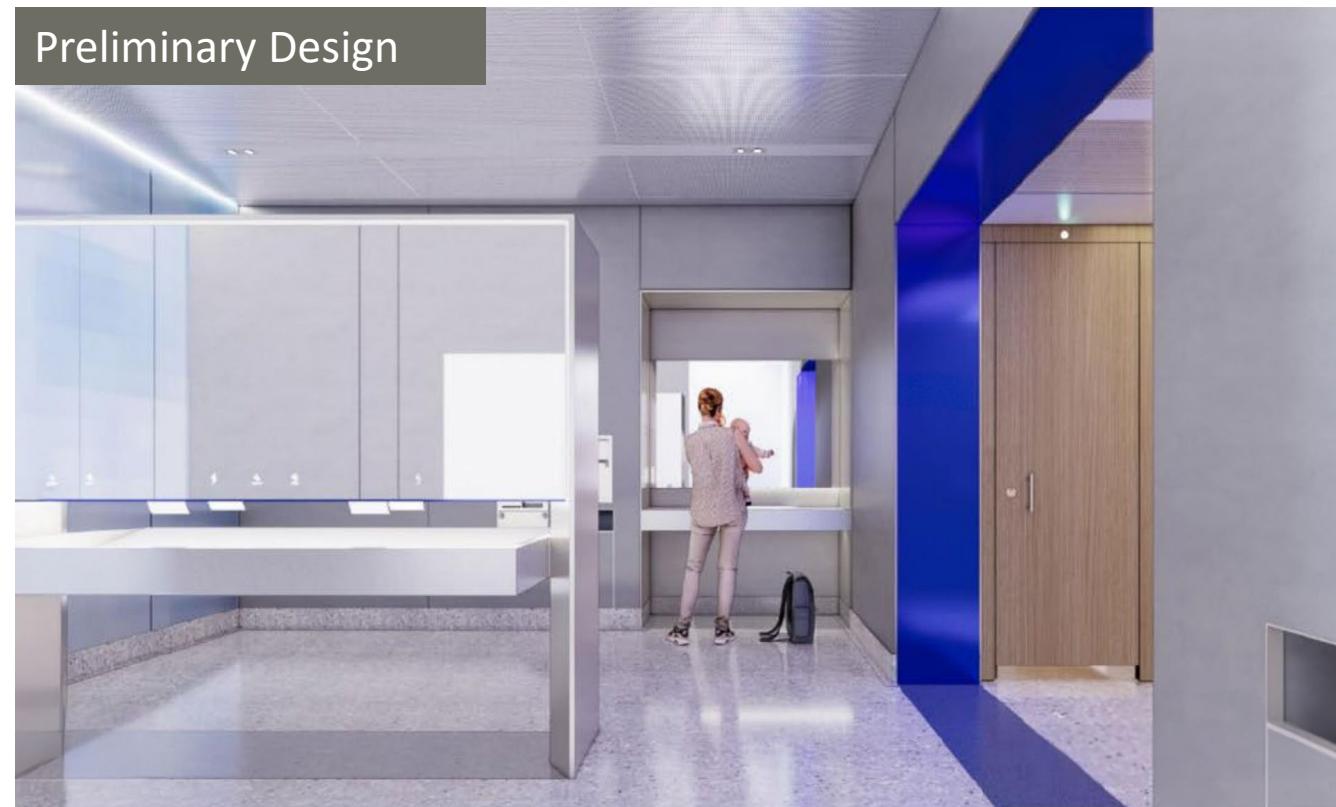
IAH/HOU – Restroom Renovations

United Airlines Restroom Renovations in IAH Terminals C & E

- 17 Restroom Sets – Renovated by 2028
- Gate E11 Construction **Started Q4**
- Aligned with HAS Restroom Standard



Preliminary Design



Draft, deliberative material.



Roadway Improvements

IAH



IAH – Will Clayton Parkway / Kenswick Drive

New Intersection Under Construction



Draft, deliberative material.



IAH Central Utilities Plant | Renovation & Upgrade

- **Current Condition**
 - Built in 1969, with last partial renovation in 2012
 - Provides chilled water and hot water to IAH Core Terminal Area for cooling and heating
 - Approximately 18,000 tons of chilled water
 - Primary Components
 - 7 Chillers
 - 2 Steam Boilers
 - 5 Hot Water Boilers
 - 4 Cooling Towers
 - Associated Mechanical and Electrical Equipment





IAH Central Utilities Plant | Renovation & Upgrade

- **Scope of Work (Summary)**
 - Replace 4 end of service life chillers
 - Replace with all electric chillers
 - Demolish 2 steam boilers
 - Renovate end of service life cooling towers
 - Upgrade mechanical electrical equipment
 - Switchgear
 - Transformers
 - Pumps
 - Building Automation System
 - Remove need for temporary support equipment by installing 2 new permanent chillers and cooling tower
 - Renovations to roof and utility tunnel
- **The project is a Design Build**
- **Estimated Overall Cost: \$152M - \$155M**
- **Initial Appropriation (June 2024): \$34.5M**
 - Design and early equipment purchase
 - Boiler room demo and cooling tower work
 - Mobilization
- **2nd Appropriation (Planned Feb 2026): \$46M**
 - Advanced procurement of mechanical and electrical equipment
 - Additional demo work on electrical equipment
- **3rd Appropriation (Planned July 2026): \$75M***
 - *Estimated pending final GMP



Parking and Ground Transportation Investments and Improvements IAH/HOU



IAH – Roadway & Rideshare Improvements

- DEC-2024 – International Arrivals Curb Opens
- JAN-2025 – International Departures Curb Opens
- July 2025 – Terminal C Rideshare Pickup Expanded



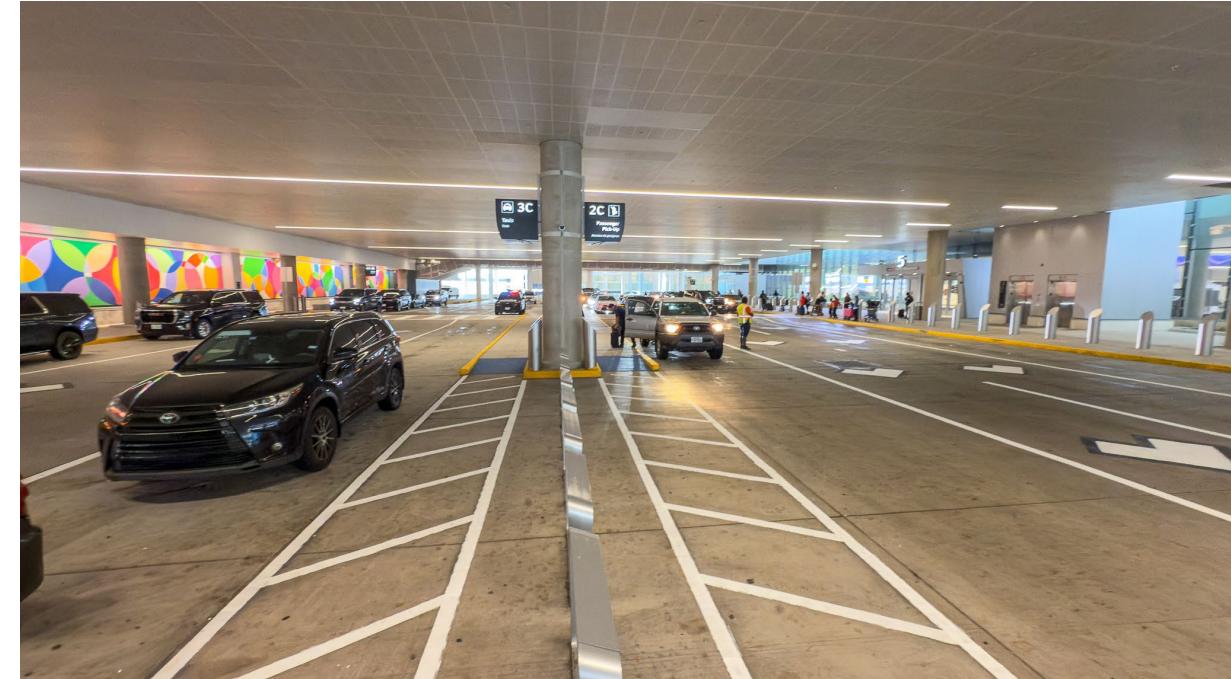


IAH – Expanded Arrivals Curb Improves Traffic

Temporary Terminal E Arrivals Curb



Terminal E Arrivals Opened December 2024

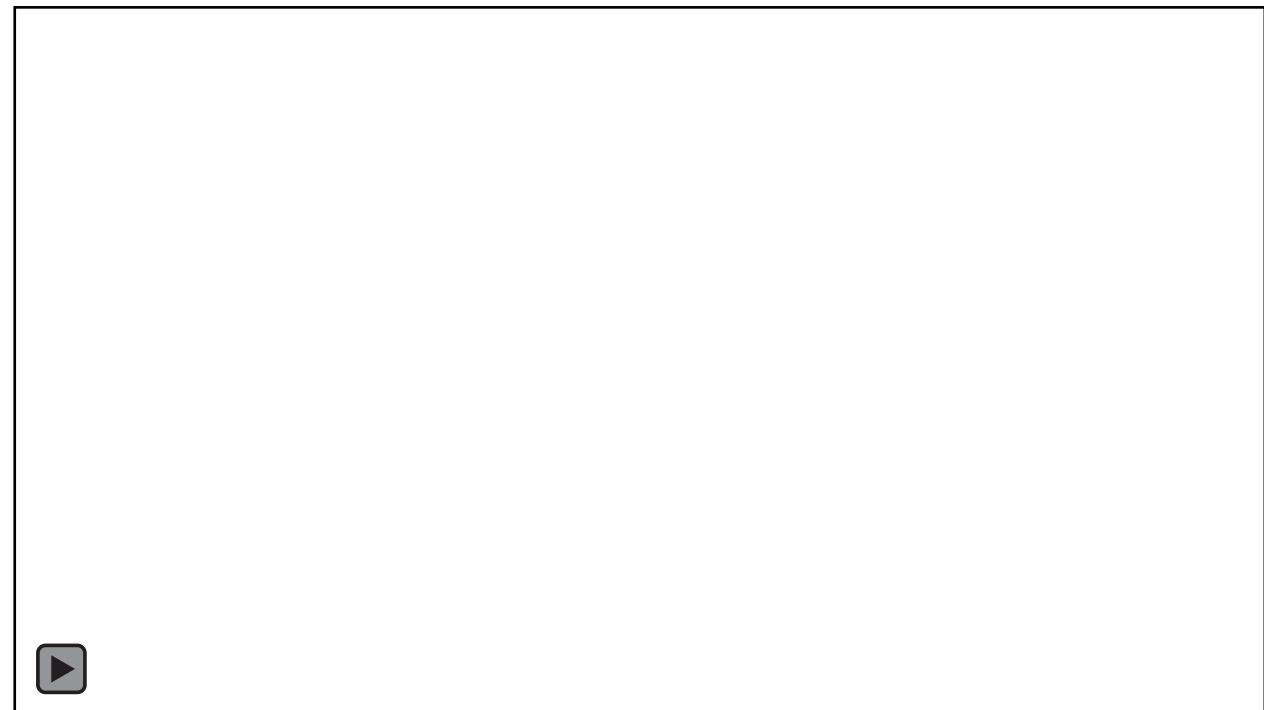




IAH – Roadway & Rideshare Improvements

New Parking Access Control with Cashless Parking and License Plate Recognition

- OCT-2025 – Rollout complete at IAH and HOU
- Improves & Simplifies Parking Customer Experience





IAH/HOU – Parking & Ground Transport Improvements

- ecoPark Bus Fleet Fully Replaced
- GPS Wait Time Displays at Terminal Curbs
- New Shelter for Rental Car Customers
 - IAH Terminal A





IAH - Skyway Modernization

Existing system

- Controls system is old technology
 - First installed in 1999
 - 117 second headways
 - 5 train-sets maximum on current system
- Vehicles are nearing end of life
- Moves 10.8M passengers per year

Upgrades

- ~\$260+M in capital upgrades
 - FAA grant eligible
- New control system that will **increase system capacity 18%** by decreasing headways
- Full vehicle replacement and an increase in fleet size
 - Increase to 8 operating train-sets will **raise capacity 30%** with 90 second headways
- New platform doors
- Phased to allow for minimal disruptions to passengers
 - Full closure during winter and fall shoulder seasons
 - January-February and September-October
- New O&M contract





Questions / Discussion

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