

# Serve Communities and Support the Economy

**Expand Transportation Options to Allow Maryland's Diverse Communities to Access Opportunities and to Support the Movement of Goods**



**KEY OUTCOMES:** By expanding transportation options to allow Maryland's diverse communities to access opportunities and to support the movement of goods, we will work to expand multimodal, transit, and active transportation use and bolster the regional economy.

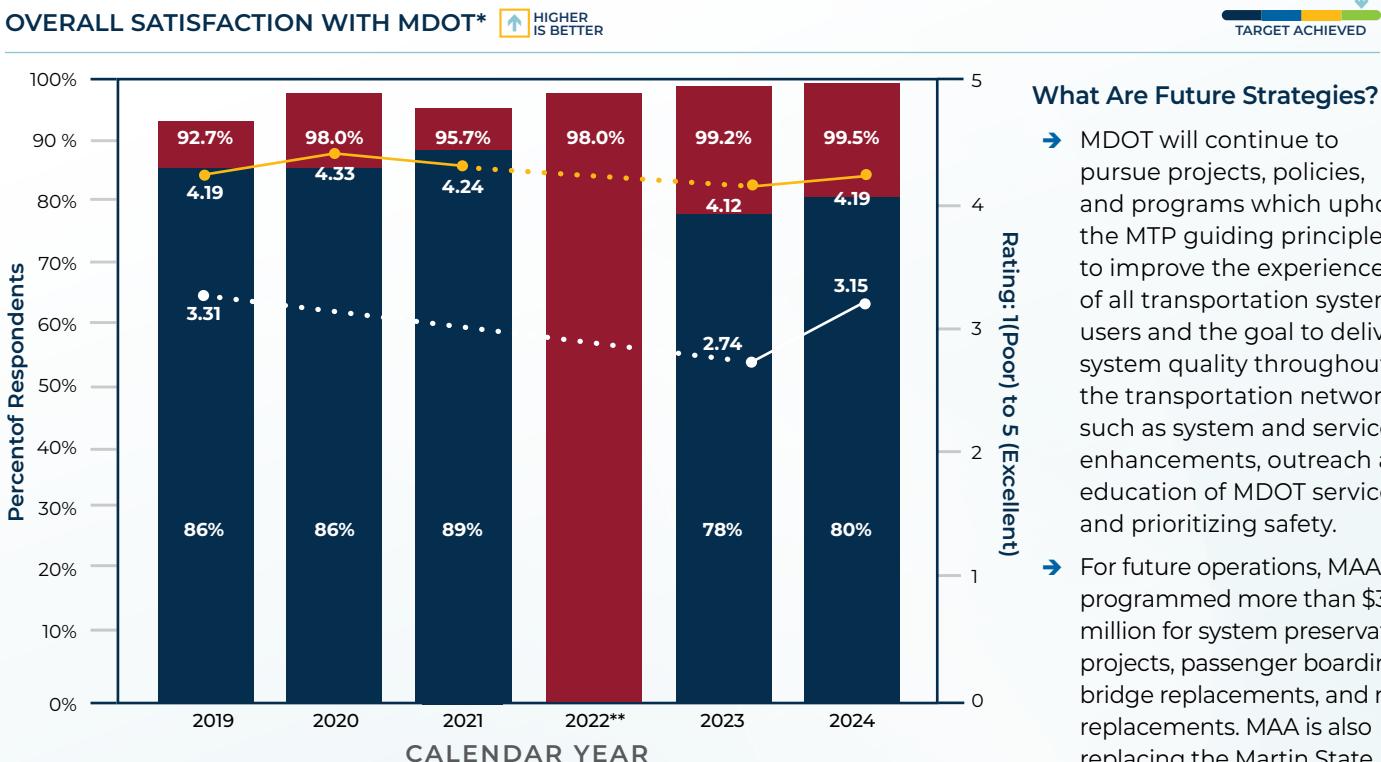
From 2023 to 2024, Maryland's population increased by 80,000 people, from 6.18 million to 6.26 million, according to the 2024 American Community Survey 1-Year Estimates. By 2045, Maryland's total population is expected to reach 6.87 million according to the Maryland State Data Center. Without changes to Maryland's transportation services, this population increase will likely induce more Vehicle Miles Traveled (VMT) statewide. Thus, Maryland is investing strategically in multimodal transportation projects to improve connectivity, reliability, safety, and access to opportunities for the State's growing communities, with a focus on serving vulnerable populations. In October 2024, MDOT announced a new strategy to spur economic development along the underserved communities along the MARC Penn Line. This project supports a vision for denser, mixed-use areas around transit hubs.

In May 2025, MTA announced the relaunching of the Southern Maryland Rapid Transit (SMRT) Project; MTA held public meetings in June to share information on the project, learn about potential mode and route alignment options, and seek out community input. Public workshops were held recently in December 2025. Simultaneously, in June 2025, MTA released the MARC Growth and Transformation Plan, outlining the investments needed for a 5-year, 10-year, and unconstrained service scenario. In October 2025, MTA released the 2025 Update to the Regional Transit Plan which provides new and revised strategies for improving public transportation in Central Maryland. Additionally, Maryland's multimodal options are continuously growing with the construction of the Purple Line, a 16-mile light rail corridor, the planning of the Red Line, a 14-mile east-west transit line, and the Commuter Choice Maryland program, which promotes alternatives to driving.

Maryland's economy and transportation sector are interconnected—a robust transportation network supporting economic strength. In 2024, the Port of Baltimore handled 45.9 million tons of cargo, its second-best year ever after 2023's record year of 52.3 million tons. In early 2025, MPA set the new record in any first quarter, with 167,863 lifts—any safe unloading or loading of a container on or off a ship. Maryland serves as a crossroad of freight activity for the entire Eastern Seaboard. The large regional rail network also supports passenger rail trips in, out, and within Maryland on MARC, Amtrak, and other transit systems. In early 2025, MAA completed the \$22 million installation of two additional 705,000-gallon jet fuel storage tanks at the Baltimore/Washington International (BWI) Thurgood Marshall Airport North Fuel Farm. This project was designed to accommodate the growing airline demand and to provide sufficient reserve capacity to ensure operational resilience in the event of supply chain disruption.

**In August 2025, MDOT announced \$500,000 in grant awards for recipients in the second round of the Purple Line Small Business Grant Program, which the Department launched earlier this year. More than 40 businesses received grant awards between \$5,000 and \$40,000 to support operations.**

## OBJECTIVE: Enhance Marylanders' Satisfaction with the Transportation System and MDOT Services



### TARGET: OVERALL INCREASE

\* Overall satisfaction with MDOT is measured via a University of Maryland survey, which was updated in 2023. MAA, MTA, and MVA conduct their own customer satisfaction surveys.

\*\* 2022 was a gap year for collecting this MDOT survey data, so 2022 is not included in this chart.

\*\*\* MAA and MTA data is on a scale from 1 (poor) to 5 (excellent).

\*\*\*\* MAA data are Q4 results, except for 2024 (Q2).

\*\*\*\*\* MDOT-wide rating combines Satisfied and Very Satisfied responses and is administered by the University of Maryland.

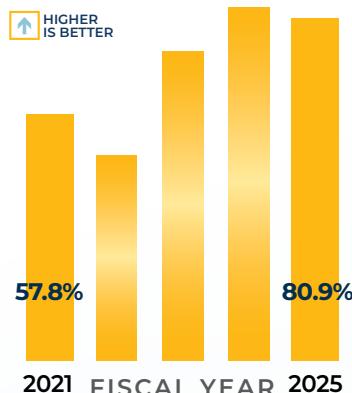
### What Is the Trend?

- From CY 2023 to CY 2024, overall satisfaction increased for MDOT and across MTA, MVA, and MAA. MTA customer satisfaction shows the most growth from CY 2023 to CY 2024, increasing from 2.74 to 3.34 (on a 1 to 5 rating scale). MVA's customer satisfaction rating continues to grow and reached its highest customer satisfaction rating in CY 2024 at 99.5%. MAA's customer satisfaction rose to 4.19 in CY 2024, increasing slightly from a 4.12 customer satisfaction rating in CY 2023.
- Several factors have contributed to MTA's high customer satisfaction. Steady on-time performance (OTP), fewer service cuts, and enhancing real-time information through new digital displays at bus stops have all improved the customer experience. MTA has also implemented a free-transfer program between MARC

- Virginia Railway Express, and developed a new Rider Code of Conduct and established a policy in 2025 that would ban riders from the system for certain actions.
- MAA, in collaboration with the Safety and Mobility Advancements Regional Transportation and Economics Research Center and the Center for Equitable Artificial Intelligence and Machine Learning Systems at Morgan State University, developed the groundbreaking Urban Flow Autonomous Wheelchair pilot program at BWI Marshall Airport. This pilot program has demonstrated that autonomous wheelchairs can be used to transport passengers from airport entrance to gate, including stops at the ticket counter and through the security checkpoint.

### What Are Future Strategies?

- MDOT will continue to pursue projects, policies, and programs which uphold the MTP guiding principle to improve the experience of all transportation system users and the goal to deliver system quality throughout the transportation network such as system and service enhancements, outreach and education of MDOT services, and prioritizing safety.
- For future operations, MAA has programmed more than \$374 million for system preservation projects, passenger boarding bridge replacements, and roof replacements. MAA is also replacing the Martin State Airport Air Traffic Control Tower and performing advanced planning for replacement of the 75 year old control tower at BWI Marshall Airport.
- MVA continues to innovate, whether through its myMVA online services or new technology offerings. MVA consistently looks for ways to make the customer experience simple and efficient.



#### What Is the Trend?

- The percent of wait times under 10 minutes decreased in FY 2025 to 73.0%, compared to 81.9% in FY 2024. This is a reversing of the increasing trend since FY 2022.
- As of September 2024, up to 80% of MVA business is now done virtually, largely due to the success of the myMVA online system where Marylanders can do tasks, such as schedule appointments, renew a license, renew registration, and find information on vehicle emissions testing. MVA's investment in on-line services has contributed to the decreased wait time for MVA customers.

#### What Are Future Strategies?

- MVA continues to focus more of its organizational operations and staff training on the customer experience.

## OBJECTIVE: Apply Enhanced Technologies to Improve Communication and Relay Real-Time Information

Real-time information systems are integrated throughout the transportation network and accessible via web interfaces and mobile devices. These systems provide the most accurate data for customer trip planning and time management. MDOT is committed to offering this service across all transportation modes.

MDTA and the Maryland Department of Emergency Management partnered with the local jurisdictions of Queen Anne's and Anne Arundel counties to enable Wireless Emergency Alerts messages to be sent to a geofenced area for high-level emergencies (i.e., an imminent threat to life or property) at the William Preston Lane Jr. Memorial (Bay) Bridge. These messages will be received on motorists' mobile devices similar to an Amber Alert message.

MTA's Customer Experience Dashboard tracks service reliability, real-time information availability, OTP, ridership,

and operator hiring for more transparent communication with the public. The agency also has worked to minimize "ghost" buses—vehicles that appear in the app but do not arrive—as well as instances where buses lack real-time arrival predictions. These improvements are an effort to improve rider confidence in the app's reliability.

Additionally, MTA is implementing several improvements to enhance the rider experience while onboard. Route ladders will be installed on all new buses, which visually provide clear and consistent route information by listing each stop on any given bus route. Onboard announcements will be upgraded to improve clarity and emphasize key points of interest. Additionally, Light Rail displays will be enhanced to offer real-time updates on service disruptions, important destinations, and trip details, ensuring riders have the most up-to-date travel information.

## OBJECTIVE: Prioritize the Transportation Needs of Overburdened and Underserved Communities in Project Selection and Scoping

This objective uses the Climate Solutions Now Act's (CSNA) definitions of "overburdened and underserved communities." Overburdened communities are defined as any census tract for which three or more of 21 environmental health indicators are above the 75<sup>th</sup> percentile statewide. Underserved communities are defined as any census tract where the most recent census survey shows:

- At least 25% of the residents qualify as low-income;
- At least 50% of the residents are non-white;
- At least 15% of the residents have limited English proficiency.

## ACCESS TO TRANSIT (WITHIN ½ MILE OF A TRANSIT STATION/STOP) BY PEOPLE WHO LIVE IN OVERBURDENED AND UNDERSERVED AREAS AS DEFINED BY CSNA\*



In CY 2025,

# 96.5%

of overburdened and underserved census tracts had all or a portion of their boundary within the ½-mile buffer zone for transit station/stops

**TARGET:** 100%

\* The methodology to determine overburdened and underserved tracts has been updated since the previous report to use Maryland Department of The Environment (MDE) 2025 data due to a change in the tools and data available from the federal government.

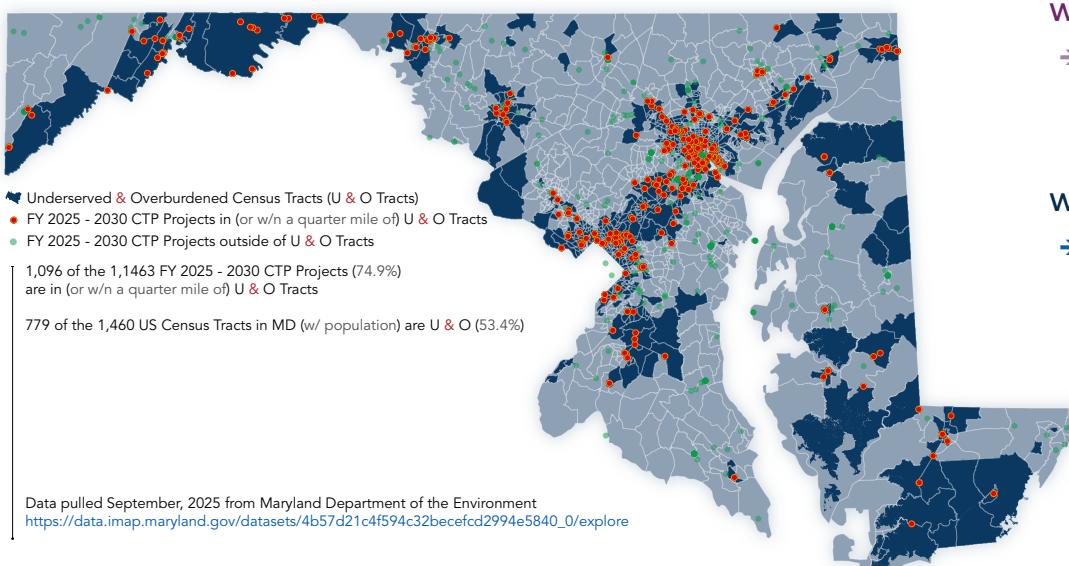
### What Is the Trend?

- There are 1,460 total census tracts in Maryland, 779 (53.4%) of which are overburdened and underserved in CY 2025. This signifies a significant increase from last year, where there were 427 overburdened and underserved census tracts in CY 2024. MDOT adopted a new methodology for identifying overburdened and underserved tracts due to the federal government's removal of their Environmental Justice Tool and data. This new methodology partly explains the sharp increase in overburdened and underserved tracts from last year.
- In CY 2025, 96.5% of the overburdened and underserved tracts were located within ½ mile of transit station/stop.
- MTA and local governments have made significant strides in adding bus shelters in the most impactful areas. Regionwide, the number of shelters in low-income neighborhoods has increased from 282 to 388, surpassing MTA's 2020 Regional Transit Plan goal of 35% growth.

### What Are Future Strategies?

- MDOT continues to expand public transit options to overburdened and underserved communities with the construction of Purple Line.
- MTA and the University of Maryland were awarded \$1.65 million under the Federal Transit Administration Transit-Oriented Development (TOD) Planning Pilot Program for Preparing for the Purple Line: An Anti-Displacement Plan.
- In May 2025, MTA announced their SMRT Planning and Environmental Linkages (PEL) project study, where nearly \$35 million will be invested into SMRT from Maryland's FY 2025–FY 2030 CTP. The project is in the planning phase, where MTA is considering various rapid transit modes such as bus rapid transit and light rail transit.

## RELATIVE PERCENTAGE OF CTP INVESTMENT THAT IS IN OVERBURDENED AND UNDERSERVED COMMUNITIES\*



**TARGET:** NONE

\* The methodology to determine overburdened and underserved tracts has been updated since the previous report to use MDE 2025 data due to a change in the tools and data available from the federal government.

### What Is the Trend?

- In FY 2025, 74.9% of CTP investment was in (or within a 1/4 mile of) overburdened and underserved communities.

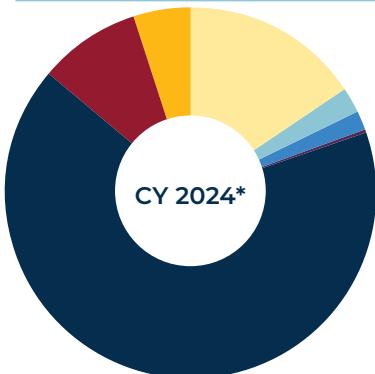
### What Are Future Strategies?

- The FY 2026 – FY 2031 CTP aims to prioritize underserved communities in its statewide investments. MDOT is leveraging a \$2 million award for the Prioritization Pilot Program, and continuing efforts to improve the Chapter 30 project prioritization process.

## OBJECTIVE: Improve Quality of Life by Providing Active Transportation and Transit Access To Jobs and Opportunities



### COMMUTE MODE SHARE



Mode	2016	2017	2018	2019	2020	2021	2022	2023*	2024
Drive Alone	73.7%	73.8%	73.9%	73.9%	72.1%	69.8%	68.2%	66.3%	66.4%
Carpool	9.3%	9.1%	9.1%	8.9%	8.6%	8.2%	7.8%	7.7%	8.7%
Transit	8.9%	8.8%	8.6%	8.4%	7.4%	6.4%	5.5%	4.9%	5.0%
Work at Home	4.4%	4.5%	4.7%	5.0%	8.1%	11.9%	14.7%	17.2%	15.6%
Walk	2.4%	2.4%	2.3%	2.3%	2.1%	2.0%	1.9%	2.0%	2.3%
Other**	1.0%	1.0%	1.2%	1.2%	1.3%	1.5%	1.6%	1.7%	1.7%
Bicycle	0.3%	0.3%	0.3%	0.3%	0.3%	0.3%	0.3%	0.3%	0.3%

**TARGET: NONE**

\*All 2024 data uses American Community Survey (ACS) one-year estimates and should not be compared with other ACS data (five-year). All 2023 data has been updated from ACS one-year estimates in the last report to ACS five-year estimates.

\*\* Other includes motorcycle, taxicab, and "other" in the ACS data.

#### What Is the Trend?

- Maryland commute mode share continues to fluctuate year-to-year from shifting workplace requirements for remote and/or in-person work. The portion of Marylanders working at home declined to 15.6% from CY 2023 to CY 2024, reversing the upward trend that had continued since 2016. Transit, carpool, and walk mode share have seen a slight increase from CY 2023 to CY 2024.
- MDOT is helping commuters impacted by the Francis Scott Key Bridge collapse by providing free [resources](#) for employees and employers, including program information, [incentives](#), and support from Commuter Choice Maryland

#### What Are Future Strategies?

- SHA is developing a mode choice model to estimate walking and biking trips in the statewide transportation model. This research will assess mode shifts from infrastructure improvements to better guide active transportation investments.
- MDOT is working to address emerging micromobility modes, including e-bikes and e-scooters, to improve understanding of the roles and responsibilities of micromobility riders and non-riders sharing the road.

### MULTIMODAL MTA TRANSIT ACCESS TO ESSENTIAL SERVICES/DESTINATIONS

The percent of essential services and destinations that are served by at least two of MTA's modes stayed constant at

# 6.3%

from CY 2023 to CY 2025.

**TARGET: NONE**

Note: Essential Services/Destinations refers to healthcare-related services; food stores, banks, and pantries; and Universities/Colleges.

#### What Is the Trend?

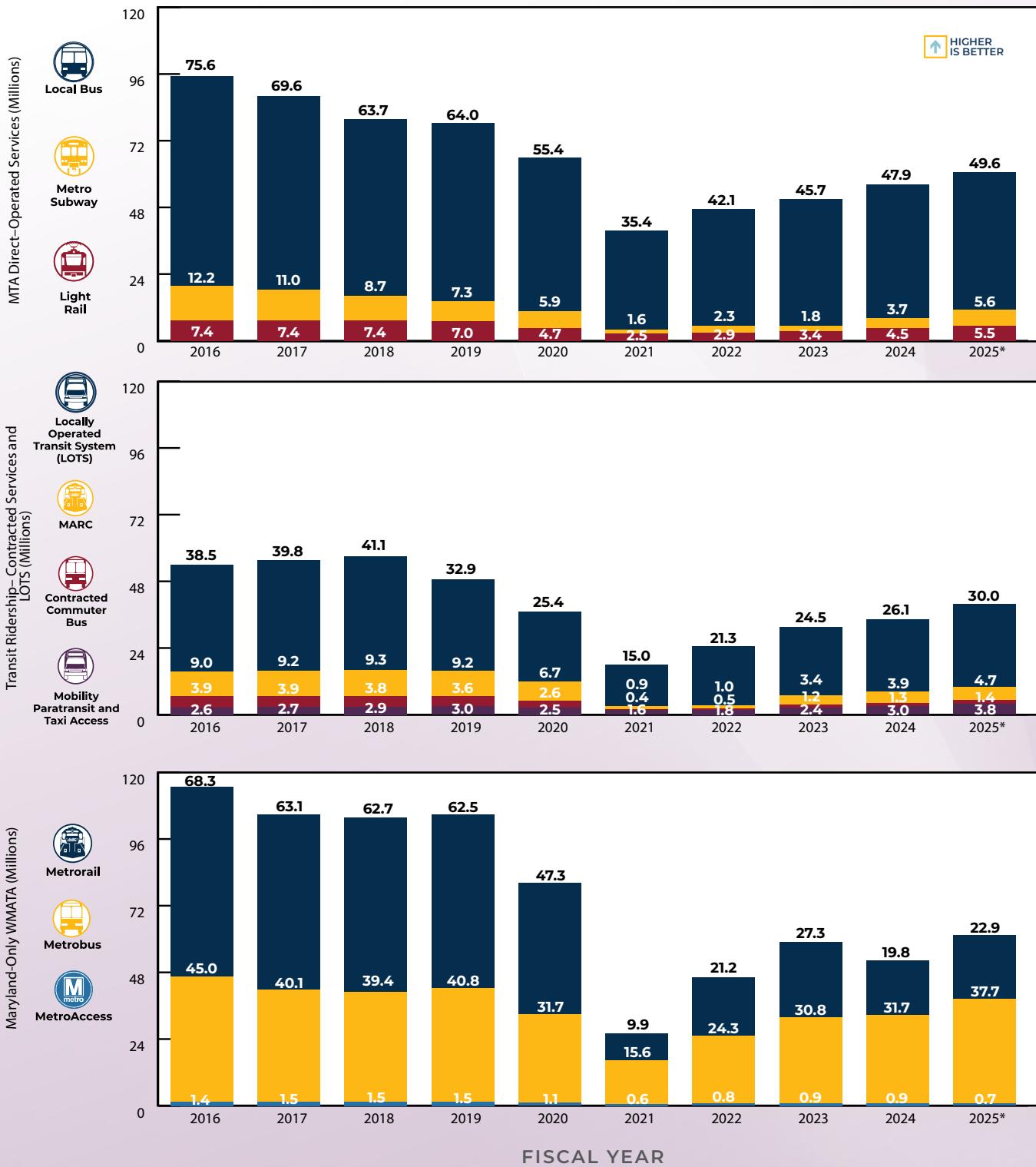
- MTA increased route frequency (e.g. LocalLink 91 between Sinai Hospital and Mondawmin) to reduce wait times, making transit more usable for essential trip travel.

#### What Are Future Strategies?

- MTA's fall 2025 service changes extends or adjusts many local and rapid bus routes to better connect riders to essential services, such as healthcare, food stores, and education. For example, QuickLink 40 was extended to the Center for Medicare and Medicaid Services, LocalLink 34 was extended to the Catonsville Walmart, and LocalLink 63 was extended to serve Gardenville and improve connection between Gardenville and Johns Hopkins-Bayview.
- In July 2025, MTA began offering free rides for children 12 and under and extended school student travel hours, which helps improve access for families and students to essential services.

## OBJECTIVE: Increase Transit Use, Active Transportation, and Transit-Oriented Development (TOD)

### ANNUAL TRANSIT RIDERSHIP (MILLIONS)



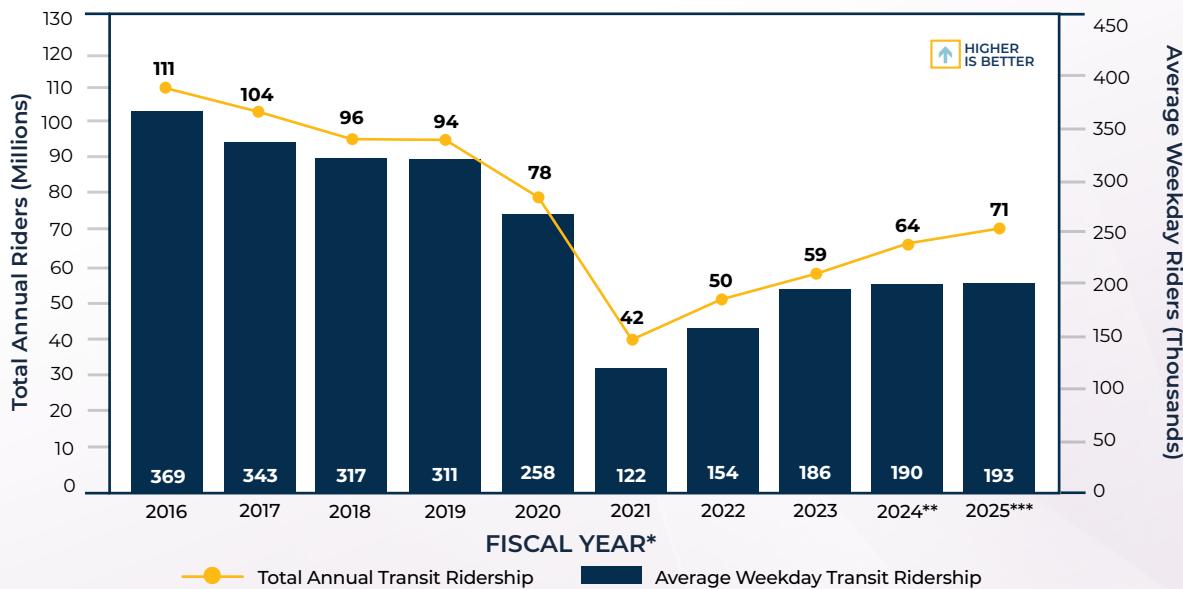
**TARGET:** OVERALL INCREASE

\* FY 2025 data is preliminary and subject to change.

Note: Ridership is based on Unlinked Passenger Trips, which are the number of passengers who board public transportation vehicles. Passengers are counted each time they board vehicles no matter how many vehicles they use to travel from their origin to their destination.

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## MTA AVERAGE WEEKDAY TRANSIT RIDERSHIP



### TARGET: OVERALL INCREASE

\* To maintain the integrity of historical comparisons of bus ridership, MTA used ridership estimate differences between the new Automated Passenger Counter system and previous systems to adjust previous bus ridership estimates and allow for comparable data for fiscal years.

\*\* Data has been revised previous report.

\*\*\* FY 2025 data is preliminary and subject to change.

Note: Ridership is based on Unlinked Passenger Trips, which are the number of passengers who board public transportation vehicles. Passengers are counted each time they board vehicles no matter how many vehicles they use to travel from their origin to their destination.

### What Is the Trend?

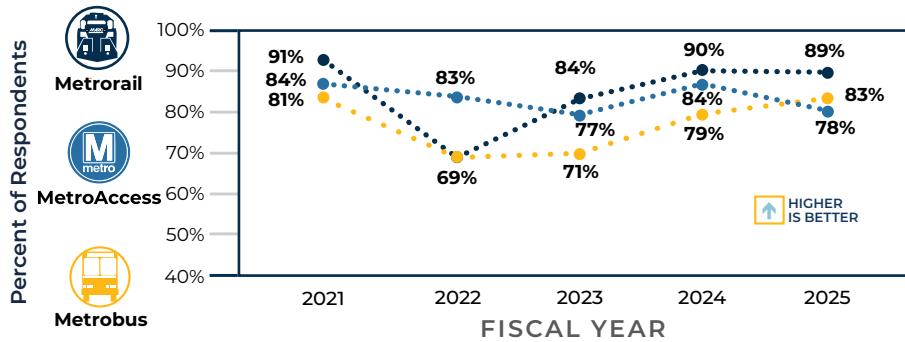
- MTA average weekday transit ridership and total annual transit ridership continue to increase, with total annual transit ridership increasing by seven million trips between FY 2024 to FY 2025.
- In FY 2025, MTA ridership for direct-operated services increased across all three categories: Local Bus, Light Rail, and Metro Subway. This increase follows the trend since FY 2021, showing consistent, incremental increases in ridership over time. Similarly, annual transit ridership for LOTS, MARC, contracted Commuter Buses, and Mobility Paratransit and Taxi Access also increased from FY 2024 to FY 2025.
- WMATA off-peak and weekend ridership grew in FY 2025 as customers responded to improved service frequencies. This growth redirected WMATA's slight decreasing trend in ridership from FY 2024 to an increasing trend in FY 2025. WMATA Metrobus ridership increased most significantly, while Metrorail ridership slightly increased. Peak period rail ridership saw strong growth in the second half of FY 2025 following the federal return-to-office order.

### What Are Future Strategies?

- In June 2025, MTA released the final BMORE BUS study, a transit plan for the Baltimore region to identify bus service improvements that could be possible over the next five to ten years with additional resources. MTA also released the Regional Transit Plan in fall 2025, a 25-year plan for improving public transportation in Central Maryland. The Plan addresses traditional transit (buses and trains) and explores new mobility options and technology.
- WMATA has improved Metrobus and Metrorail frequencies and implemented Automatic Train Operations, which makes rail trips faster and more reliable. "Tap. Ride. Go.," which allows customers to use credit cards to pay fares, was launched on Metrorail in FY 2025 and will be rolled out to bus and parking in FY 2026.
- MTA will continue to support the Fredrick Douglass Tunnel project, which will create new tunnels for Amtrak Northeast Corridor and MARC Penn Line trains and support electrification of Penn Line service and a new West Baltimore MARC Station.



## WMATA OVERALL CUSTOMER/PASSENGER SATISFACTION\*



**TARGET:** 85% FOR METRORAIL, 75% FOR METROBUS, AND 79% FOR METROACCESS

Note: Results are for Q4 and are not averaged over FY, which is from July 1 to June 30 for WMATA.

\*This performance measure is new to the AR.

## What Is the Trend?

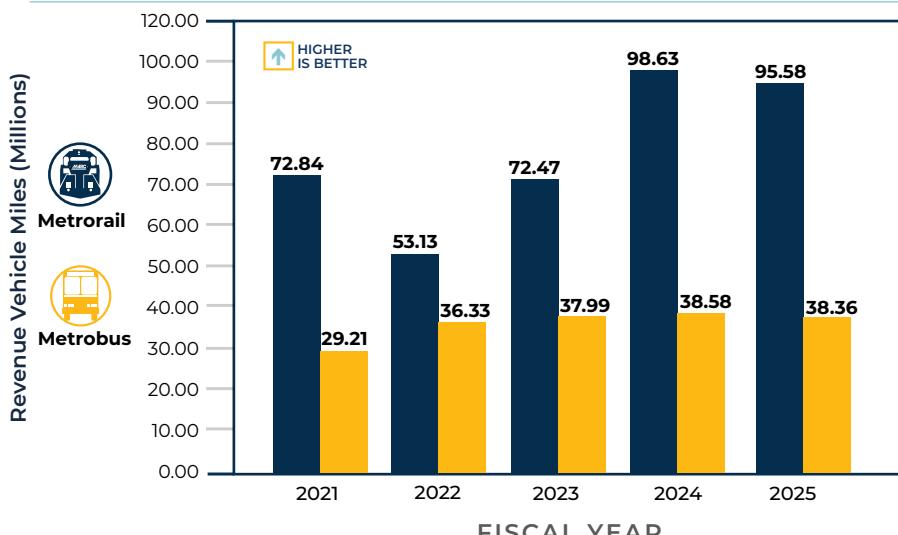
- Satisfaction continues to be above the Strategic Transformation Plan (STP) target of 85% for Metrorail in FY 2025. Metrobus satisfaction continued to improve in FY 2025, well surpassing the STP target of 75%. MetroAccess satisfaction fell in FY 2025, associated with decreases in service reliability associated with adapting to a new contract model, putting it just below the STP target of 79%.
- Between FY 2024 to FY 2025, there were slight decreases in satisfaction for MetroAccess and Metrorail by 6% and 1%, respectively. However, Metrobus experienced a 4% increase in customer/passenger satisfaction.

## What Are Future Strategies?

- WMATA will continue to enhance safety, which has contributed to improvements in rail and bus satisfaction. This includes visible staffing on platforms and trains and crisis intervention teams.
- Service reliability and shorter wait/travel times are top drivers of customer willingness to ride more. WMATA will continue efforts to improve OTP while investing in more frequent service. For Metrobus, this includes recruiting bus operators to minimize missed service, implementing strategies to actively manage late and early trips, and continuing partnerships with jurisdictions to expand bus priority.
- WMATA will continue to work with its contracting partners to increase MetroAccess reliability and therefore increase customer satisfaction.



## WMATA REVENUE VEHICLE MILES (MILLIONS)\*



**TARGET:** OVERALL INCREASE

\*This performance measure is new to the AR.

## What Is the Trend?

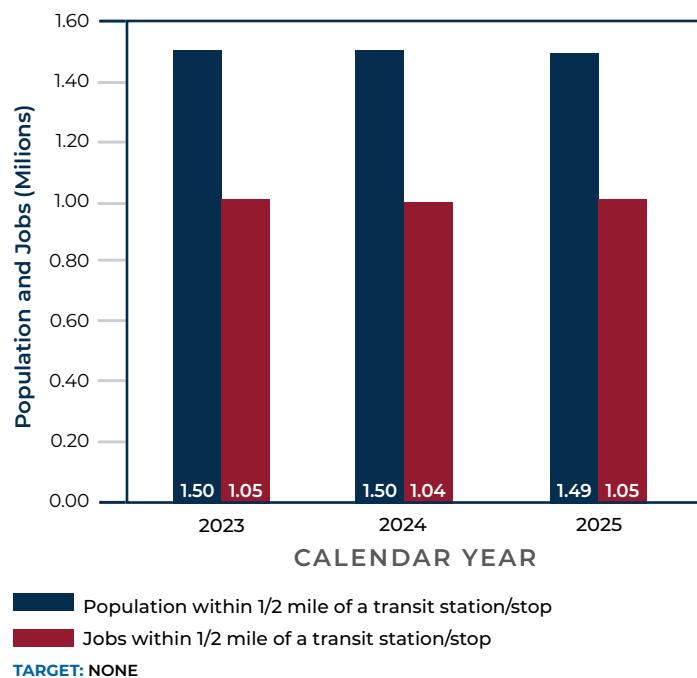
- Off-peak and weekend ridership continued to grow in FY 2025 as customers responded to improved service frequencies. Peak period rail ridership saw strong growth in the second half of FY 2025 following the federal return-to-office order, though total vehicle miles decreased slightly for Metrorail and Metrobus.

## What Are Future Strategies?

- WMATA's Better Bus Network Redesign, which launched June 2025, expanded the all-day frequent service network and improved access to key destinations. Metrorail service changes and proposed service changes include improved frequencies, extended weekend opening and closing times, and the implementation of Automatic Train Operations, which makes rail trips faster and more reliable.



## POPULATION WITHIN ½ MILE OF A TRANSIT STATION/STOP AND NUMBER OF JOBS WITHIN ½ MILE OF A TRANSIT STATION/STOP



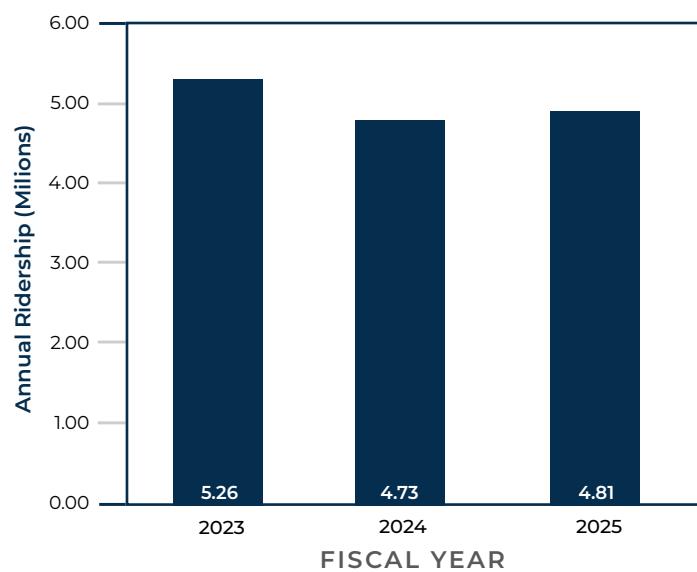
### What Is the Trend?

- Compared to CY 2024, there was a 0.54% decrease in total population within ½ mile of transit stations/stops in CY 2025. However, there was a 1.13% increase in the number of jobs with a ½ mile of transit stations/stops from CY 2024 to CY 2025.

### What Are Future Strategies?

- MTA completed multi-year efforts to overhaul and extend the life of 52 Light Rail vehicles and 63 MARC rail vehicles, increasing transit-ridership for jobs despite the decrease in population near transit stops.
- Significant efforts occurred in FY 2025 to advance TOD statewide, supporting projects at Reisterstown Plaza Metro Station, Odenton MARC Station, North Bethesda Metrorail station and Wabash Avenue between West Cold Spring and Reisterstown Plaza Metrorail stations. In conjunction with Maryland Economic Development Corporation (MEDCO), the MARC Penn Line TOD MEDCO Strategy Plan was completed, identifying proposed opportunities and anticipated benefits of TOD projects at MARC stations.

## FIXED-ROUTE RIDERSHIP BY SENIORS AND PEOPLE WITH DISABILITIES



### What Is the Trend?

- In FY 2025, there were an estimated 4.8 million trips taken by seniors and people with disabilities on MTA's fixed-route transportation system, which is a slight increase from FY 2024. However, this ridership count has not rebounded to FY 2023's higher ridership count, at 5.25 million riders.
- The percent of transit stops and stations that are Americans with Disabilities Act (ADA) accessible has increased from 19% to 28% since 2020.
- The ridership increases can be attributed in part to inclusive planning efforts: community audits, steering committees that include older adults and people with disabilities, and outreach to understand their needs. There was more nonprofit collaboration to support transportation for seniors and people with disabilities like with the American Federation of the Blind.

*Note: MTA calculates this measure by utilizing their reduced fare passes for those with Mobility certification usage and calculates the proportion and extrapolate to ridership, thereby creating this ridership estimate. Additionally, disability fare is combined with senior fare, so these measures are combined. This measure includes both directly operated services as well as contracted services.*

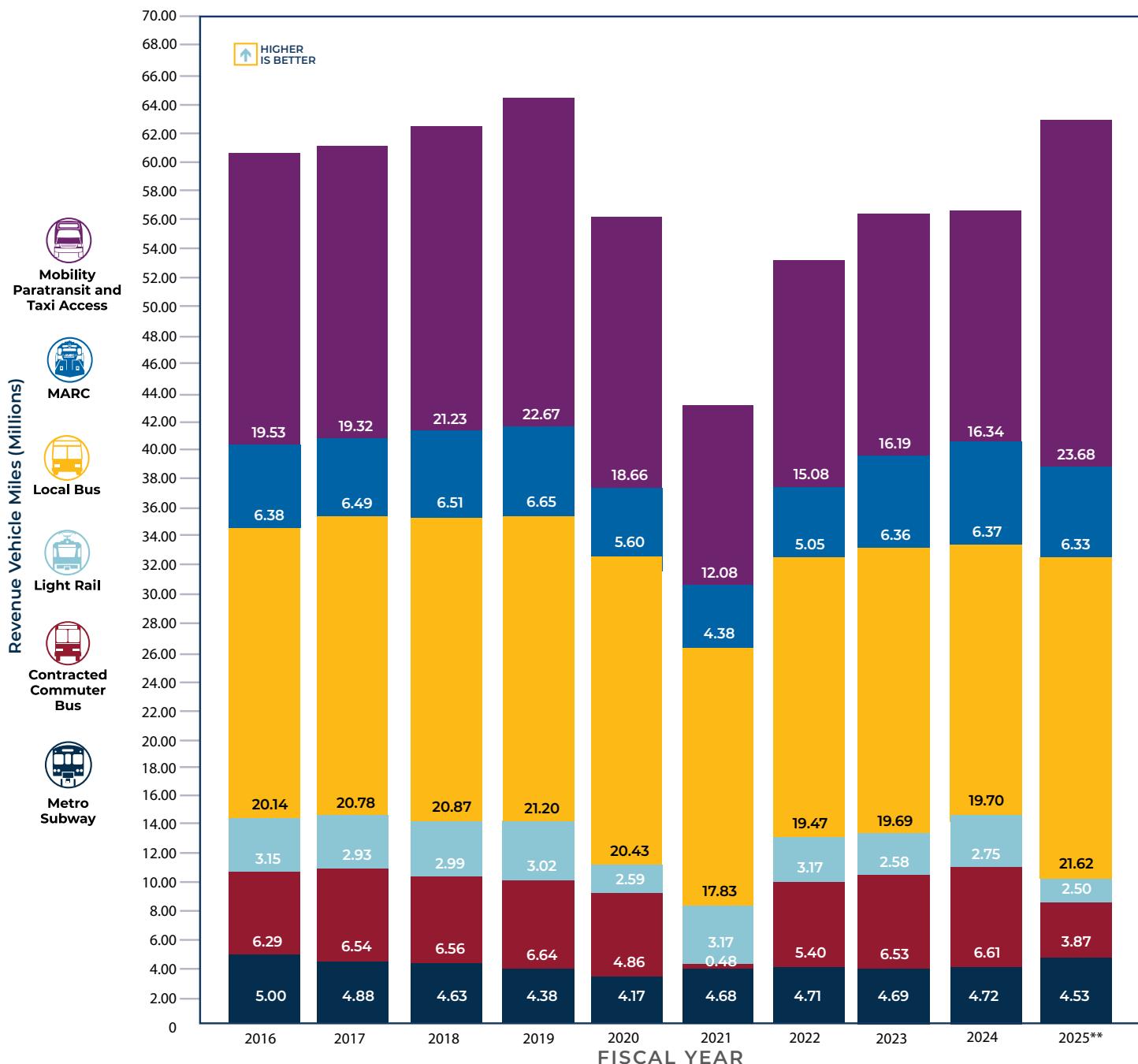
### What Are Future Strategies?

- MTA strives to make fixed-route services accessible for all populations of riders. For seniors and riders with disabilities, MTA uses enhanced wayfinding, better signage, and announcement systems to better assist all riders.
- All of MTA's planned expansion of the transit system, including implementation of the Red and Purple Line projects and the QuickLink 40 and a focus on providing better connections to housing, employment centers, and shopping through TOD policies, will benefit seniors and people with disabilities who choose to ride or rely on transit.

## ANNUAL REVENUE VEHICLE MILES OF MTA SERVICE PROVIDED\*



Revenue vehicle miles measure each mile for which a transit vehicle is in service and accepting customers. This measure indicates the level of service for six types of transit service.



## TARGET: OVERALL INCREASE

\* All units are revenue miles (millions). Excludes LOTS and WMATA.

\*\* 2025 data is preliminary and subject to change.

## What Is the Trend?

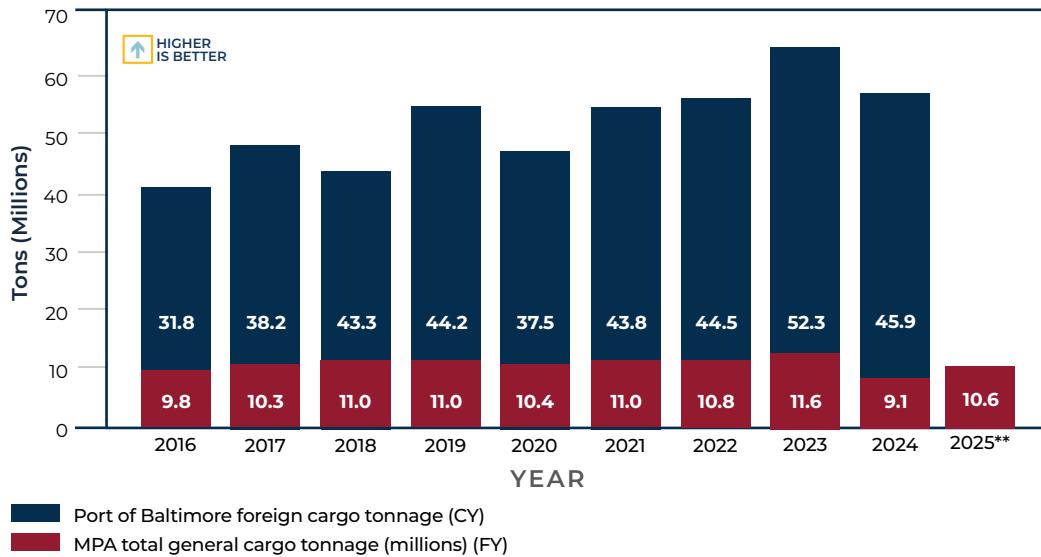
- From FY 2024 to FY 2025, the annual revenue miles of MTA services increased to levels equivalent to pre-pandemic trends across most transit modes, apart from contracted Commuter Bus.

## What Are Future Strategies?

- MTA is in the planning and engineering phase for the Red Line and continuing construction work for the Purple Line, both of which are expected to expand transit service and increase annual revenue vehicle miles in the future.
- In June 2025, MTA released the MARC Growth and Transformation Plan, outlining the refreshed vision and objectives, findings from market analysis and equity assessments, recommendations for necessary capital improvements, and implementation strategies for MARC.

## OBJECTIVE: Improve the Efficiency and Competitiveness of the Port of Baltimore and BWI Marshall Airport

### PORT OF BALTIMORE FOREIGN CARGO TONNAGE AND MPA GENERAL CARGO TONNAGE\*



**TARGET: NONE**

\* MPA cargo data is provided by FY, but Port information is reported using the latest full CY because Port statistics combine data for public and private marine terminals that use different fiscal year reporting timeframes. Therefore, 2025 data cannot be reported until early 2026.

\*\* MPA general cargo includes both foreign and domestic waterborne cargo, whereas, Port-wide data includes only foreign waterborne cargo. Port-wide data for CY 2025 is not yet available; FY data for 2025 is an estimate.

#### What Is the Trend?

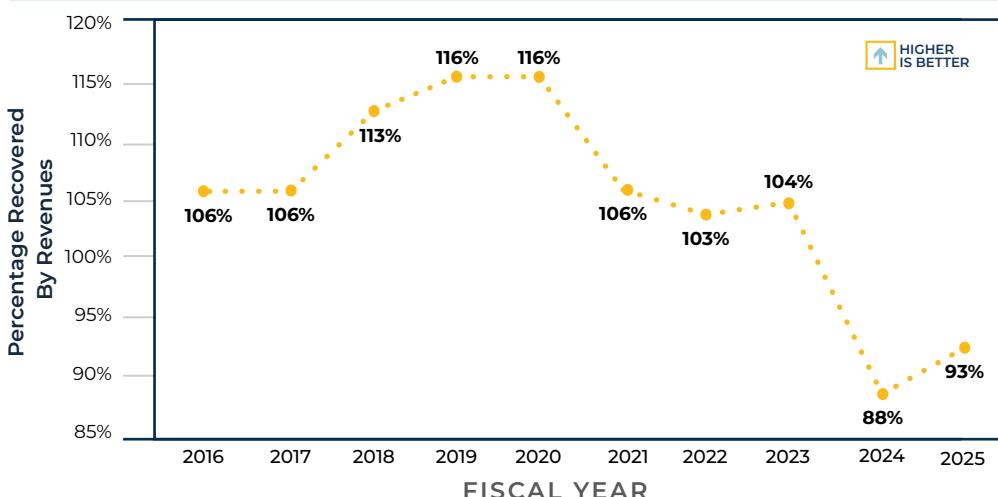
- Due to the collapse of the Francis Scott Key Bridge on March 26, 2024, access to the MPA's terminals were blocked or partially limited. The channel did not fully reopen until June 10, 2024. However, it still took months after this date to see all regularly scheduled services return to the State-owned marine terminals in FY 2025.
- Despite challenges, CY 2024 was the Port's second-best year ever after CY 2023 when the port handled a record 52.3 million tons of cargo. The total cargo had a value of \$62.2 billion, third-most in the Port's history.
- The Port of Baltimore is ranked as the 10<sup>th</sup> largest port in the U.S. in terms of foreign cargo tonnage and 11<sup>th</sup> largest in terms of dollar value. The Port is beginning to face challenges imposed by the increase in tariffs.



#### What Are Future Strategies?

- The I-695 Francis Scott Key Bridge Rebuild project will reconstruct the structure using a Progressive Design-Build procurement process. The project is expected to be funded from insurance and FHWA emergency relief proceeds. Regionally, the Key Bridge played a critical role in the transportation network, including the transport of goods to and from the Port of Baltimore, the nation's largest port facility for specialized cargo and passenger facilities, and nearby distribution centers such as Tradepoint Atlantic at Sparrows Point. On December 21, 2024, Congress approved the full federal funding of the Key Bridge Replacement Project's eligible costs. This project's costs will be updated when more details are available. The MDTA will use toll revenue to fund the Key Bridge reconstruction, with potential reimbursement in the future.
- The State will invest \$15 million in the Tradepoint Atlantic's Terminal Container Project, increasing container capacity by 70%, generating more than \$1 billion in private sector investment, and producing more than 8,000 new jobs for Marylanders.
- MPA continues ongoing maintenance of the 50-foot channel system that ensures access for large vessels and continues to promote both the State-owned terminals and the private marine terminals to steamship lines and cargo interests.

## PERCENTAGE OF MPA OPERATING BUDGET RECOVERED BY REVENUES\*



### TARGET: NONE

\* This measure is calculated by dividing operating revenues by operating expenses and exclusions. Revenues are derived from activities such as dockage, wharfage, crane rental, acreage/shed/office space leases, cruise business, and more.

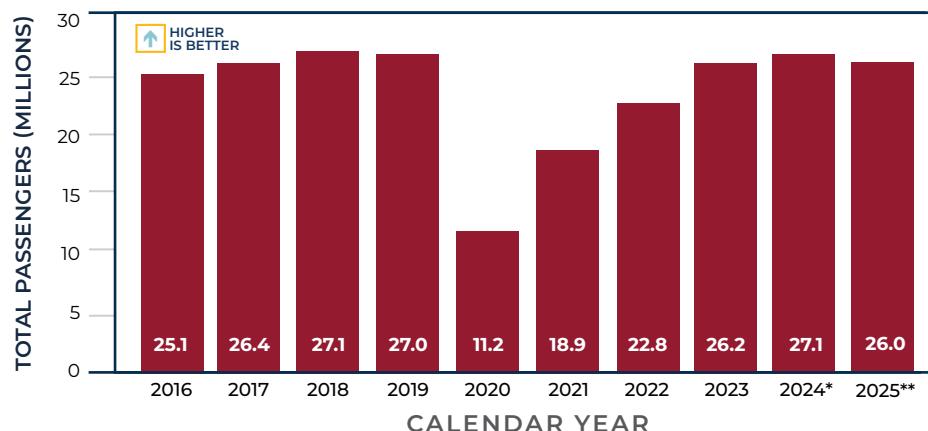
### What Is the Trend?

- MPA cargos were still recovering in the beginning of FY 2025 from the collapse of the Key Bridge and the closure of the shipping channel that leads to MPA's terminals. As a result, MPA revenues were lower with less cargo coming through its terminals. However, revenues showed an increase from FY 2024 to FY 2025 from 88% to 93%.

### What Are Future Strategies?

- MPA continues aggressive marketing efforts to ensure steamship lines and cargo owners are fully aware of the Port's restored capabilities and capacity.
- In October 2024, CSX was able to offer a double-stack container route heading north of Baltimore while work continues on the Howard Street Tunnel. MPA is marketing this new access to customers as an option to use until the Howard Street Tunnel project is completed.
- MPA signed a new five-year contract with Carnival Cruise Line that keeps the world's largest cruise provider serving the Port of Baltimore. The agreement took effect on January 1, 2025, and includes a five-year renewal option.

## BWI MARSHALL AIRPORT TOTAL ANNUAL PASSENGERS



### TARGET: INCREASE

\* 2024 data has been revised from the previous report.

\*\* 2025 data is preliminary and subject to change.



- The second half of FY 2025 saw a period of economic uncertainty, where domestic leisure passenger levels suffered as consumers slowed down discretionary spending, which included travel. FY 2025 passengers are expected to finish at just over 26 million.

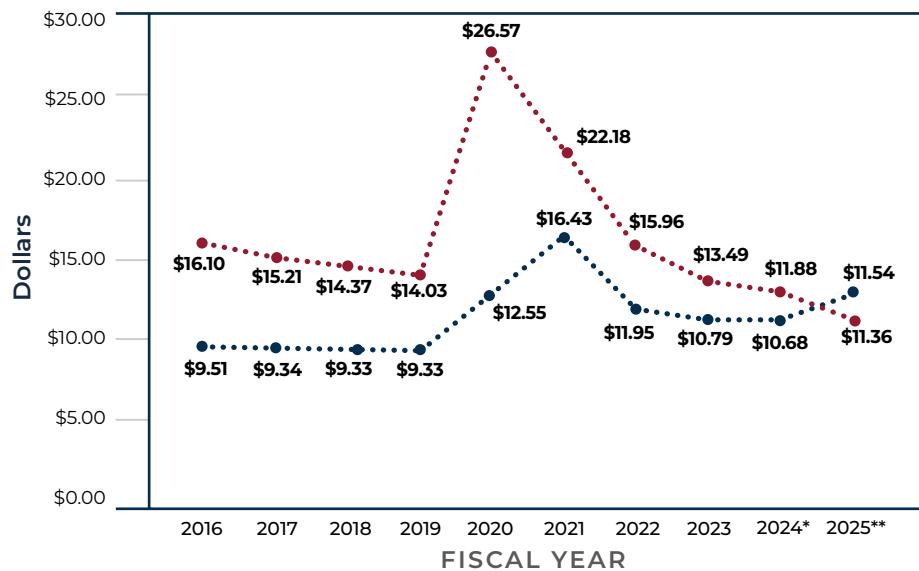
### What Are Future Strategies?

- Many projects are underway at BWI Marshall Airport to improve capacity, efficiency, and customer experience. These include a \$425 million Concourse A/B Connector and Baggage Handling System program, development of a Southwest Airlines maintenance facility, ticket counter and baggage system expansions, security screening checkpoint improvements, and multiple resiliency and state of good repair projects.
- MAA continues to market the airport and work with its airline partners to provide additional routes and expand BWI Marshall Airport's service offerings.

### What Is the Trend?

- In July 2024, the first month of FY 2025, BWI Marshall Airport broke the record for monthly passenger traffic with more than 2.6 million passengers, an increase of 8% over July 2023.
- After that stellar month, the two largest carriers at BWI Marshall Airport, Southwest and Spirit, both began to shrink capacity due to aircraft availability issues. Southwest was unable to receive aircraft from Boeing at the rate it expected, and Spirit saw dozens of aircraft grounded due to issues with their Pratt & Whitney engines. After the first half of FY 2025, passenger levels at BWI Marshall Airport were flat compared to FY 2024.

## COMPARATIVE AIRLINE COST PER ENPLANED PASSENGER (CPE)



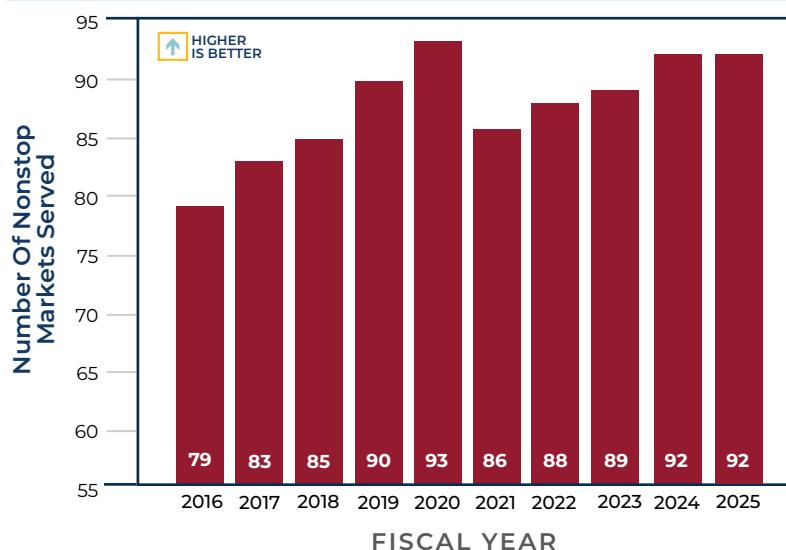
### What Is the Trend?

- BWI Marshall Airport's CPE remains competitive and stable at \$11.54 in FY 2025, reflecting a \$0.89 increase from FY 2024 due to a 4% decline in enplanement activity and rising operating costs driven by labor and contractual expenses. This uptick aligns with broader industry trends, as overall airline travel slows amid economic pressures and uncertainty.
- Mean CPE at comparable airports dropped to \$11.36 in FY 2025, the first year that this number is below BWI Marshall Airport's CPE in over a decade.

### What Are Future Strategies?

- BWI Marshall Airport continues to remain competitive in the region despite the lower CPE at other airports including Washington Reagan National (DCA), Dulles International (IAD), and Philadelphia International (PHL) Airport. MAA will look to manage operating and capital costs to keep a competitive CPE. This includes leveraging federal and other funding sources in the capital program as well as controlling operating costs.

## NUMBER OF NONSTOP AIRLINE MARKETS SERVED



### What Is the Trend?

- The number of nonstop markets, or destinations, served at BWI Marshall Airport has almost reached pre-pandemic numbers; 92 were serviced in FY 2025 compared to the peak of 93 in FY 2020.
- Southwest Airlines, BWI Marshall Airport's largest carrier, added overnight redeye flights from the West for the first time and added new service to Long Beach, Ontario (CA), Portland (OR), Sacramento, San Francisco, and San Jose. Spirit Airlines, the second largest carrier, returned service to Charleston, Charlotte, Chicago-O'Hare, Detroit, Fort Myers, Milwaukee, Nashville, Punta Cana, Raleigh-Durham, and San Antonio.

### What Are Future Strategies?

- MAA's Air Service Development team regularly engages with airlines to explore opportunities for expanding or adding routes at BWI Marshall Airport by emphasizing the airport's access to a sizable population with above-average household income, as well as its competitive operating costs and the benefits of MAA's air service incentive program.

TARGET: 2030: 90, 2050: 100



## FREIGHT ORIGINATING AND TERMINATING IN MARYLAND BY MODE—TOTAL TONNAGE AND TOTAL VALUE\*

METHOD FOR MOVING FREIGHT	TOTAL VALUE (MILLIONS) CY 2025****	TOTAL TONNAGE (THOUSANDS) CY 2025****
Air	8,360	77
Multiple Modes & Mail Goods	85,076	6,893
Other**	266	83
Pipeline	9,463	46,437
Rail	15,825	20,882
Truck	376,594	234,767
Water***	68,828	50,850
All Freight	564,412	359,989

### TARGET: NONE

\* Source (excluding "Water"): U.S. Department of Transportation Freight Analysis Framework (FAF). The FAF version is 5.7. [FAF 5](#) is based on 2017 data. FAF 5.7 includes the preliminary annual estimates for 2024 and the final annual estimates for 2023. In addition, FAF 5.7 includes improved estimates of foreign trade flows for 2024 by ground modes across the Canada and Mexico borders and of waterborne foreign trade flows. This version makes changes from previous versions in that it includes additional modal detail or classification than in the past. Therefore, previous FAF assessments cannot be accurately compared as value and tonnage may be attributed to different modes in previous versions. It is important to point out that FAF data are estimates and combinations of various data sources to identify what might be tonnage and value by mode for each state and zone in the nation. There is no source that provides a single, verified number.

\*\* Category "Other" includes movements not elsewhere classified such as flyaway aircraft, in and out of foreign trade zones and shipments for which the mode cannot be determined as stated in the documentation for the FAFs.

\*\*\* "Water" data is provided by MPA and is a CY 2025 estimate based on January to August 2025 Port of Baltimore totals.

\*\*\*\* CY 2025 data is preliminary and subject to change.

### What Is the Trend?

- Freight value in Maryland has continued to increase since the pandemic. Since 2020, value estimates increased to or near pre-pandemic values except in air cargo. Significant increases in values occurred in the categories of other and unknown freight, water, and multiple modes and mail.
- The Port's cargo movement has returned to levels similar to before the collapse of the Key Bridge in March 2024, which significantly declined cargo movements into and out of the Port for months in 2024.
- Air freight has increased annually due to expansion in freight cargo services over the years. Since 2022, BWI Marshall Airport freight cargo services have more than doubled due to services with Amazon and UPS. IAD, which has FedEx, also serves as a major belly cargo hub for United and is a U.S. gateway for numerous foreign flag passenger cargos.
- Freight with the highest value in, out, and through Maryland travels by truck followed by water, then multiple modes and mail goods. The phrase "multiple modes and mail goods" represents movements of commodities that utilize more than one mode, as defined in the U.S. Bureau of Transportation Statistics' Freight Analysis Framework (FAF).

### What Are Future Strategies?

- MPA will continue to support and fund the dredging program to maintain the Port's 50-foot channel. Also, MPA will continue promoting strategies to grow cargo volumes at the Port of Baltimore – including containers, automobiles, Ro/Ro, breakbulk, and other opportunities – as detailed in the Maryland Port Strategic Plan.
- MAA will continue to maintain the State's aviation facilities and runways in a state of good repair to support the vitality of aviation statewide. To improve operations, MAA will continue to enhance fuel reserves, pipeline capacity, and related system resilience for BWI Marshall Airport to minimize disruptions from pipeline/supply or tanker truck issues. To expand services, MAA will continue expanding air-cargo facilities at the BWI Marshall Airport.
- MVA will continue to support connected and automated vehicle technology to build experience and attract partners, integrate the technology and investments, and explore deployment opportunities for moving freight in Maryland.
- TSO and SHA will continue to promote strategies that improve rail safety, security, and resilience identified in the Maryland State Rail Plan. Also, they will collaborate with partners to maintain truck and rail safety enhancement and monitoring program. Separately, TSO and MDOT will continue to support the utilization of rail service by the establishment of the new Freight Rail Grant Program and the operation and expansion of short line freight rail by supporting service on state-owned corridors. SHA will continue to further develop the truck parking program and improve truck parking issues as detailed in the 2020 Maryland Truck Parking Study.

