Memorandum

MIAMI-DADE COUNTY

Date: November 9, 2026

ASC
Agenda Item No. 7(B)

To: Honorable Chairman Anthony Rodriguez and Members, Board of County Commissioners

From: Daniella Levine Cava
Mayor

Subject: Third Quarterly Report on Direct Air Service between Miami International Airport (MIA) and Singapore, Tokyo, Riyadh, and Asuncion - Directive No. 252061

Executive Summary

This report is in response to Resolution No. R-1036-25 (Resolution), sponsored by Commissioner Danielle Cohen Higgins, and adopted by the Board of County Commissioners (Board) on October 21, 2025. The Resolution directs the County Mayor or the County Mayor's designee to (i) determine the feasibility of establishing direct passenger or cargo air service between Miami and Singapore, Tokyo, Riyadh, and Asunción, and if feasible, solicit the routes from the appropriate airline carriers, potentially in coordination with the Greater Miami Chamber of Commerce, the Greater Miami Convention & Visitors Bureau, and the Beacon Council, and (ii) place a quarterly report on a Board agenda, subject to committee review, providing an update on the efforts taken to provide such air service, any outreach to airline carriers, or changes in feasibility. The Resolution also instructed the International Trade Consortium (ITC), among other things, (i) to the extent feasible, negotiate and prepare Sister Cities Agreements and transmit those agreements to the County Mayor or County Mayor's designee for execution, and (ii) to provide a separate report to the Board regarding the status of the negotiations. ITC has indicated that a separate report will be placed on a Board agenda in response to the resolution. At its October 6, 2026, regular meeting, the Board approved Commissioner Danielle Cohen Higgins' motion to amend this report's frequency from quarterly to semiannual placement on the Board's agenda.

In accordance with the Board's directive, the following Third Quarterly Report for the time period July 1, 2026 – September 30, 2026, provides an update on Miami-Dade Aviation Department's (MDAD) ongoing efforts to secure direct passenger and cargo air service to the destinations referenced above. There are no key updates to report for this quarterly reporting period. MDAD continues to pursue air service development opportunities and is planning to

meet with airline representatives at the upcoming Routes World Conference in October 2026 to further discuss potential service to the identified markets.

Over the past four years, MDAD has continued extensive engagement with airline and government representatives. Through this work, MDAD has identified the primary obstacle to launching new long-haul international passenger service: a global shortage of long-range aircraft. This challenge, further compounded by elevated fuel costs and geopolitical factors affecting airline network planning, continues to limit near-term opportunities. Even so, industry representatives anticipate improvements in fleet availability within the next two (2) to three (3) years. In light of these expected changes, Tokyo remains the strongest near-term opportunity, while other markets will require a more gradual, long-term development strategy as operating conditions improve.

Similarly, MDAD's cargo market assessments show that although long-term opportunities for international cargo growth persist, expansion remains constrained primarily by the limited availability of long-range freighter aircraft rather than by market demand. Geopolitical conditions in the Middle East have had only a modest impact on cargo operations; however, the lack of aircraft availability remains the primary factor affecting the feasibility and timing of future service development.

Third Quarterly Report: 07/01/2026 – 09/30/2026

Over the past three (3) years, the Miami-Dade Aviation Department (MDAD) has been, and continues to be, engaged in a structured, multi-phase route development process for the destinations identified in this directive: Singapore, Tokyo, Riyadh, and Asunción, except for Tokyo, which MDAD has actively pursued since June 2011. These cities represent major financial, commercial, and emerging trade hubs that align with the County's trade, tourism, and business objectives while helping preserve MIA's competitive standing among U.S. airports. Expanding air connectivity with these cities would reinforce the County's position as a global economic gateway.

To support this effort, MDAD continues to implement a comprehensive route development strategy that includes market analysis, targeted airline engagement, international outreach, participation in global route conferences, and direct discussions with airline leadership. The goal is to identify and

secure viable new air service opportunities that strengthen MIA's global connectivity.

This Third Quarterly Report, and all subsequent quarterly reports, will provide updates on the route development efforts for each destination, including airline and government engagement, route feasibility and status, notable developments, next steps, and anticipated timelines.

Table 1, shown below, provides a consolidated overview of the progress achieved to date**,** with detailed narrative updates for each destination presented in the sections that follow.

Destination Overview

Table 1: Route Development Status

Destination	Airline/ Government Engagement	Route Feasibility /Status	Notable Developments	Next Steps	Anticipated Timeline
Singapore	MDAD is planning to meet with Singapore Airlines at Routes World in October 2026.	Under discussion with MDAD as a strong potential for cargo. Cargo Study is being updated.	Singapore Airline does not have long-range passenger aircraft availability and has limited cargo aircraft availability.	Continue discussion with Singapore Airlines, Changi Airport, and the Singapore Government.	TBD
Tokyo	Japan Airlines (JAL)	Long-Term Opportunity.	JAL has long-range aircraft availability, and it further increases	MDAD is planning on presenting the business case at	2-3 years

	American Airlines (AA)	Business Case completed. Evaluating Minimum Revenue Guarantee (MRG) model for American Airlines possibility. The model functions by guarantee-ing the airline a specific, predeter-mined amount of revenue for a new route over a defined introductor y period.	in 2-3 years. MIA assisted with coordinating charter flights for World Baseball Classic 2026 to showcase operational capacity. Future cargo service potential with Nippon Cargo Airlines.	Routes World in October 2026. MDAD plans to meet with business leaders at SEUS in October 2026. American Airlines has not provided an estimated operational cost to complete the Minimum Revenue Guarantee analysis. MDAD will continue to pursue initiative.	
Riyadh/ Jeddah	Saudia Airlines	Riyadh Airport is under renovation, and Riyadh Air does	Jeddah is more favorable. Saudia Airlines views	Support Saudia Airline planning efforts; continue	2-3 years

		not have long-range aircraft to provide direct passenger and cargo services. Jeddah is a more likely destination for such services. Airline studies completed.	Miami as a strong market, but requires aircraft acquisition. Scheduled meetings with both Riyadh Air and Saudia Airlines for Routes World in October 2026.	coordina-tion on operational and market readiness. Middle East Conflict suspended plans for the moment.	
Asunción	Paraguay an govern-ment led develop-ments.	Market and airlines studies completed. Discussions regarding the potential for *Fifth-Freedom operations via Asunción were initiated with GOL Airlines in 2024. At	Recently, American Airlines (AA) received aircraft for the route, but still does not have enough of them for their fleet. GOL Airlines announced the service in March 2026, but	Continue supporting develop-ments, market, and operational readiness. The American Airlines (AA) Service is pending more aircraft to launch the route.	2027-30

		that time, GOL Airlines showed no interest in pursuing the opportunity. However, on Feb. 12, 2026 GOL expressed a renewed desire to re-evaluate the route, signaling a possible shift in their strategic outlook.	later suspended its launch plans due to the operational impacts of the conflict in the Middle East, which increased fuel costs and affected the airline's route planning. Cargo services between MIA and Asuncion is currently provided by Avianca and LATAM Cargo.	Middle East Conflict and rising fuel prices suspended plans for the moment. MDAD will discuss GOL's updated plans during Routes World in October 2026.	

*Fifth Freedom Flight - is an international air service that allows an airline to carry passengers between two (2) foreign countries as part of a route that begins or ends in the airline's home country. It is one of the "Freedoms of the Air" established under international aviation agreements.

1. Singapore

Singapore is a leading global financial center and a critical gateway to Southeast Asia. Currently, direct passenger service between MIA and

Singapore Changi Airport (SIN) remains unlikely due to the range limitations of current aircraft.

Direct cargo service is more probable, since it does not require nonstop service. Many cargo routes have multiple stops within their route. Singapore Airlines Cargo has limited aircraft but plans to order more in the future. MDAD continues to engage with the airline and the Singapore Embassy's Trade & Tourism Office, with meetings held on November 21, 2025, December 1, 2025, and February 2, 2026, to further discuss opportunities for potential service collaboration. MDAD plans to hold more cargo route discussions directly with Singapore Airlines Cargo at Routes World in October 2026.

2. Tokyo

Tokyo is home to one of the world's largest metropolitan economies and serves as a central hub for finance, advanced manufacturing, and technology. Direct flights from Miami would significantly enhance access to Japan and Northeast Asia, facilitating business travel, investment activities, and cultural and educational exchanges.

Mayor Daniella Levine Cava and Aviation Director and CEO Ralph Cutié traveled to Japan from November 25 to December 6, 2023, as part of the Americas Linkage trade mission organized by the Greater Miami Chamber of Commerce (GMCC) and the Office of Innovation and Economic Development. During the mission, the Mayor and the Miami-Dade delegation met with senior representatives of JAL to promote Miami as a destination and to discuss the potential for direct air service between Tokyo and Miami. JAL agreed to continue evaluating the route. Since then, MDAD has maintained regular engagement with the airline through annual meetings at the Southeast U.S./Japan Joint Meeting and the Routes World Conference.

Most recently, JAL has begun taking delivery of new long-haul aircraft capable of operating nonstop service between Tokyo and MIA, with additional aircraft expected over the next (2) to three (3) years, improving the long-term feasibility of the route. In the interim, MDAD continues to strengthen its relationship with JAL by supporting the airline's charter operations, including multiple charter flights for the 2026 World Baseball Classic, following similar successful operations in 2023. These flights demonstrated MIA's ability to efficiently accommodate international charter operations, including coordination of airfield and terminal operations, customs processing, and VIP

services. JAL expressed its appreciation for the professionalism and coordination provided by MDAD's operations and ground handling teams. MDAD recently completed an updated business case analysis for the Tokyo market and plans to present the findings to JAL at Routes World in October 2026 or through a dedicated meeting with its headquarters.

3. Riyadh/Jeddah

Riyadh is rapidly emerging as a global business and investment center under Saudi Arabia's Vision 2030 initiative, which is driving increased demand for international trade, tourism, and aviation. The government of Saudi Arabia has committed to establishing two (2) hubs, one in Riyadh and one in Jeddah.

Riyadh Airport is undergoing massive renovations and expansion to become the largest in the world, with completion expected in 20 years. Riyadh Air is a new airline with a limited fleet of long-range aircraft. Therefore, they do not currently have the feasibility to fly nonstop to Miami. The airline plans to receive additional aircraft over the next several years. After multiple meetings with both the airline and the airport during October and November of 2025, MIA determined that the potential for short-term direct air service is limited and that a more favorable option is service to Jeddah.

Jeddah is another major commercial gateway to Saudi Arabia and the Red Sea region, serving as a hub for trade, logistics, and tourism. A direct flight via Saudia Airlines from Miami would strengthen economic ties with the Middle East, support the growing demand for business and leisure travel, and improve access to markets across the Gulf, Africa, and South Asia. During discussions on October 15, 2025, Saudia Airlines identified Miami as a strong market opportunity but indicated that launching service would require approximately two (2) to three (3) years to secure the necessary aircraft.

The ongoing conflict in the Middle East has temporarily delayed expansion plans for both carriers, postponing consideration of new service opportunities. MDAD will continue discussions with Riyadh Air and Saudia Airlines at the Routes World Conference in October 2026 to better assess their network expansion plans and the potential for future service to MIA in 2027.

4. Asunción

Asunción serves as Paraguay's economic and governmental center and is a strategic gateway to South America. It is the only Latin American capital not

served from Miami. Direct service would enhance access to emerging markets, foster agricultural and manufacturing trade, and strengthen business ties throughout the region. American Airlines is the most likely airline to provide the service, but currently does not have enough of the proper aircraft to operate the route. American Airlines (AA) recently acquired its first aircraft capable of providing the service, but it will be used to replace older aircraft on domestic routes. Future aircraft will be used to expand their network or launch new air service.

MDAD staff met with GOL Airlines during the Routes World Conference in 2024 and discussed the idea of Fifth Freedom Flights via Asuncion, but at the time, GOL Airlines did not express any interest. Later, in early 2026, the airline engaged with the Paraguayan government regarding Fifth Freedom rights and expressed interest in the route. GOL Airlines announced plans to launch nonstop service between Miami and Asunción in March 2026; however, the airline subsequently postponed the launch due to higher fuel costs resulting from the conflict in the Middle East, which affected the route's economic viability. GOL has indicated that it remains interested in introducing the service and is expected to reconsider the route once fuel prices stabilize and market conditions improve.

Conclusion

MIA continues to pursue new direct international routes through a structured air service development strategy, with progress currently influenced by global aircraft availability and higher operating costs resulting from volatile conditions in the Middle East, which have affected airline fleet deployment and route planning worldwide. Current opportunities include cargo service discussions with Singapore Airlines Cargo; GOL Airlines' potential launch of service to Asunción once fuel costs stabilize; the strongest near-term passenger opportunity to Tokyo via Japan Airlines (JAL); and future service to Jeddah with Saudia Airlines as regional conditions permit. There are no key updates or material changes in feasibility to report for this quarterly reporting period. MDAD plans to meet with airline representatives at the upcoming Routes World Conference in October 2026 to continue discussions regarding potential service to the identified markets, with any resulting developments to be included in a subsequent report. As market conditions improve, these ongoing efforts are expected to reinforce Miami-Dade County’s position as a leading global aviation and economic gateway.

Given the lengthy and complex process of negotiating and establishing direct flight routes between MIA and international cities, my Administration recommends scheduling this report on a semiannual or annual basis rather than quarterly. Should you require additional information, please contact Aviation Director Ralph Cutié at 305-876-7066.

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