



# Night Moves:

## AMAZON AIR EXPANDS NOCTURNAL FLYING WHILE BOOSTING WIDEBODY CAPACITY

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### Our analysis of Amazon Air’s moves shows that since early 2024, the carrier has:

- Increased nocturnal flying by more than one-third in the U.S., putting 92.5% of the mainland’s population within 250 miles of the airport with an early-morning arrival or one-day trucking distance from its Ohio Valley hub. This facilitates next-day delivery capabilities.
- Prioritized widebodies, growing the tonnage capacity of its U.S. fleet by 14% and setting the stage for more third-party shipments.
- Reduced flying under 400 miles, showing a preference for using trucks over this distance.
- Moved away from a singular focus on the Cincinnati-Northern Kentucky International Airport (CVG) superhub by expanding other U.S. hubs.

**Amazon Air is a much different air cargo unit from two years ago** due to its addition of widebody aircraft, expanded nocturnal flying, and heavy emphasis on the domestic U.S. market. The unit made headlines in October by moving more aggressively into third-party shipping and continues bucking the trends that have prompted air cargo integrators to downsize. This independently produced brief review of Amazon Air’s initiatives between March 2024 and March 2025 uses publicly available data and builds upon our previous [Amazon Air Brief](#) released early last year.<sup>1</sup> The opinions expressed are solely those of the authors. For a primer on Amazon Air, see the sidebar on page 4 of [our 2023 Brief](#).



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PHOTO (ABOVE): BOEING 737 AT SAN BERNARDINO IN EARLY 2025 (PEIWEN CHEN PHOTO).

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# FINDINGS FROM OUR ANALYSIS

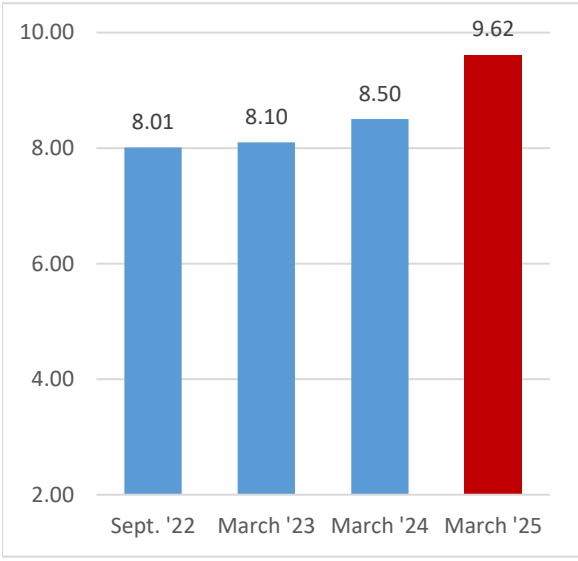
The analysis draws on publicly available sources of information, including:

- Flight data on 11,500 Amazon Air takeoffs and landings using publicly available ADS-B data since 2020, including recent activity from February 5 to March 20, 2025.<sup>2</sup> We define “flights” as the sum of takeoffs and landings at an airport.
- Geographic analysis of Amazon flights using ArcGIS Pro, QGIS software, and U.S. Census data.
- Fleet registration information from the FAA and other sources, including planespotter.net.
- Geographic analysis of the European network, as discussed on page 9.

**FINDING 1.** The tonnage-carrying capacity of Amazon Air’s U.S. fleet increased by 14% between March 2024 and 2025, mainly due to the addition of nine more A330-300 freighters. More than three-fourths of its available ton-miles in the U.S. are now on widebodies, a dramatic increase from three years ago. Although several more planes are recorded as “parked” than last year, capacity is up 7% even when these idle planes are excluded.

Through the early post-pandemic period, Amazon Air remained focused on putting as much of the U.S. mainland within a few hundred miles of one of its airports as possible, even if this meant using small aircraft, including turboprops, which are less efficient to operate. This approach mirrored that of air cargo integrators such as FedEx and UPS, which have flights to more than 100 destinations from their busiest hubs.

**FIGURE 1: Amazon Air Payload Capacity**  
In millions of pounds, including parked planes



Since mid-2023, Amazon Air’s objectives have changed. The unit has dropped five U.S. airports and turned toward larger planes. It now has ten A330-300 freighters, seven of which were added over the past year, although two have not yet begun revenue service. These planes have 17% more tonnage and 6% more volume capacity than the fleet's Boeing 767-300s, its next largest planes.

In the past year, these moves have increased the **tonnage and volume capacity of the U.S. fleet by 14.3% and 12.9%**, respectively. Globally, capacity is up 13% over one year and 18% since 2023, almost entirely due to an enlarged U.S. fleet (Figure 1). Thirteen of its 99 planes, including two recently arriving A330s, were recorded as parked in early 2025, compared to just six at the same point last year. **If only active planes are considered**, its global capacity is up 6.6%.<sup>3</sup>

The vast majority (75%) of its available ton-miles and more than 80% of its available cubic-volume miles in the U.S. is now on widebodies. The fleet, however, is in flux. The cargo unit is phasing out its operating partnership with Atlas Air, one of its first and largest contractors. Many Atlas planes have been turned over to other contractors. Longtime contractor ABX, part of the ATSG Group in which Amazon has an equity stake, and 21 Air, a new partner, still fly for the retailer. The unit's intentions for the nine remaining Atlas planes (all but two Boeing 737s) are unclear.

The shift toward larger aircraft has been rapid and decisive. The average payload of its aircraft, measured in tonnage, has grown 10.1% over the past two years. The U.S. fleet's "up gauging" is even greater, home to all the A330s. Amazon Air ceased using five turboprops in mid-2023, and the first A330s took to the skies later that year.

These shifts augment Amazon's expanding push into third-party shipping. Larger planes give the retailer more room beyond internal needs and facilitate bulk shipments. The revenue potential from large inbound shipments to its busiest hubs is particularly attractive. Our [analysis](#) late last year shows that Amazon Air, like FedEx and UPS, suffers from disproportionate outbound cargo at its hubs due to the number of parcels originating in warehouses near them. As a result, inbound capacity is more likely than outbound capacity to be underutilized. Larger planes also position Amazon Air for bulk time-sensitive shipments from the West Coast to the country's interior.



An Airbus A300(f) in San Bernardino in the summer of 2025

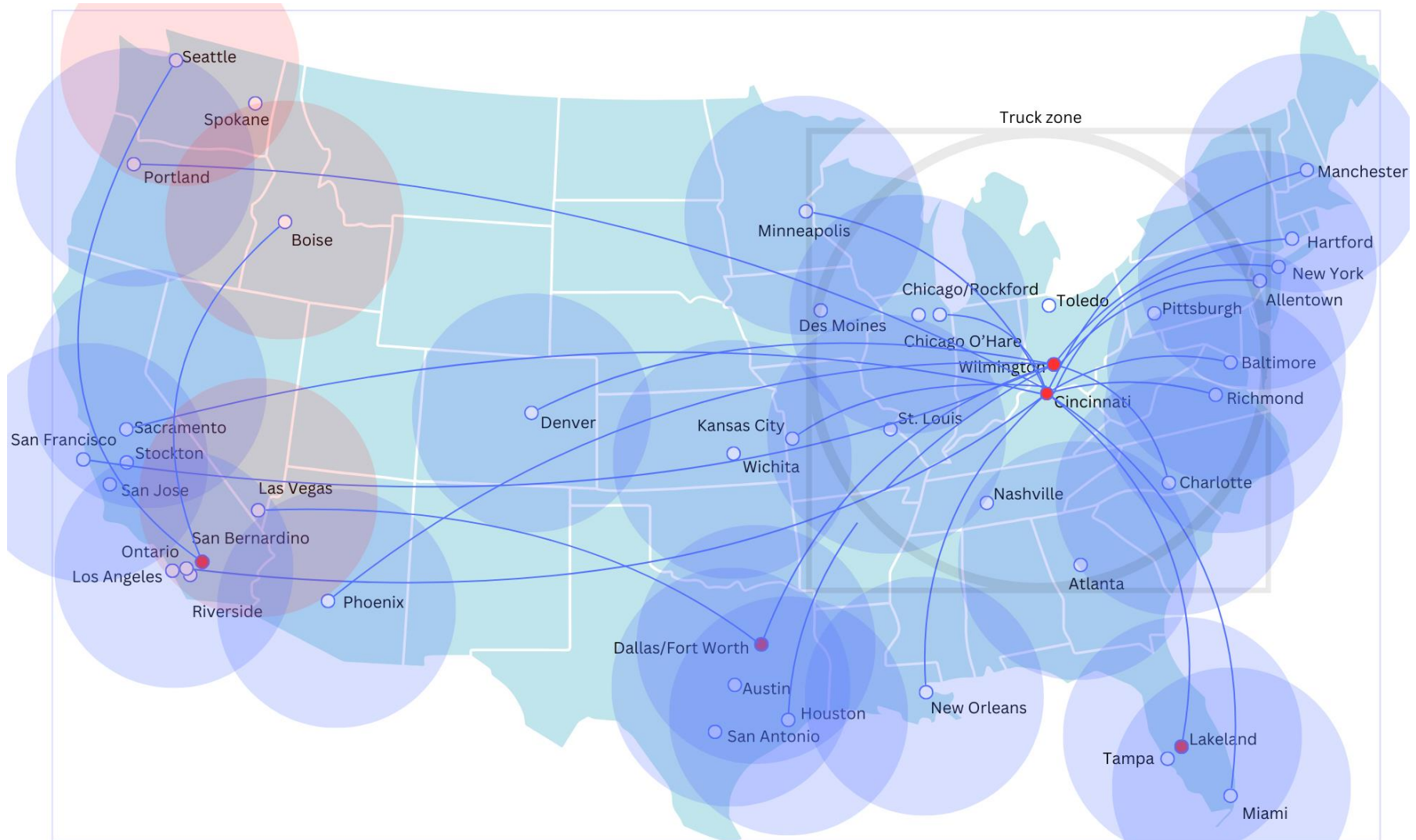
**FINDING 2.** Nocturnal flying, defined as departures between 11 pm and 5:59 am, expanded by over one-third in the U.S. over the past year. More than 90% of the U.S. mainland's population is now within 250 miles of the airport with an early morning arrival or within a one-day trucking drop from its Ohio Valley logistics hub near Cincinnati. Late-night flights have also been added at other hubs, further enhancing Amazon Air's overnight package delivery capabilities.

The proportion of domestic U.S. flights on nocturnal schedules (defined as departures between 11 pm and 5:59 am, local time) grew from 30.1% in early 2023 to 29.1% in early 2024 to 38.96% in early 2025, respectively. Over this interval, Amazon Air added more than 120 weekly flights, many departing between 11 pm and midnight. The unit now averages around 67 daily nocturnal flights. If the definition of "nocturnal" is expanded to 10 pm – 6 am, 41.0% of flights are nocturnal, up from 33.8% last year.

These flights have early-morning arrivals that are well suited for sorting and transferring packages requiring next-day delivery. Cincinnati CVG's nocturnal offerings have grown particularly impressively. Several new long-haul routes were added, including Minneapolis, MN; Portland, OR; Richmond, VA; and



**FIGURE 2: Areas Served by Early Morning Flight Arrivals from Major Hubs or Less Than a One-Day Truck Trip from Cincinnati CVG**

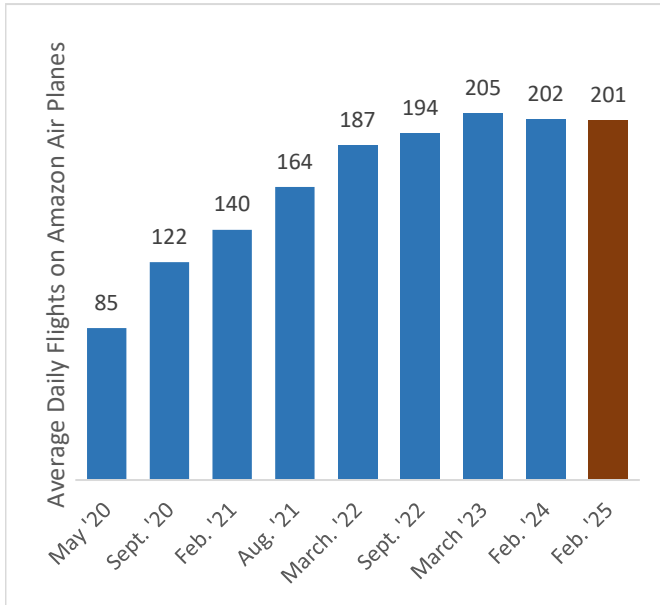


CAPTION: This map shows areas less than 250 miles from an airport with an early morning arrival from a major hub or 400 miles from the Ohio Valley logistics center, criteria that allow for next-day delivery of goods warehoused at major hubs. **Blue circles** represent areas with early morning (before 6 am) arrivals from Cincinnati CVG, while **red circles** represent areas lacking early morning arrivals from CVG but having such arrivals from other hubs. On a small number of routes shown, flights are less than daily.

Sacramento, CA, while only Boise, ID, and several flights to closer destinations easily reachable by truck were dropped (Figure 2). CVG’s nocturnal departures are now more tightly clustered than a year ago, most occurring between 12:30 am and 1:15 am. The airport typically has 13 flights during this frenetic interval.

Ohio’s Wilmington Air Park (ILN) has a smaller departure bank, typically six flights, mostly between 12:00 and 12:45 am. Still, Amazon Air avoids duplication. None of the destinations reached by CVG’s nocturnal

**FIGURE 3: Amazon Air Global Flight Activity**



departures are regularly served by ILN’s. The synergy between these airports, which are only 60 highway miles apart, gives Amazon Air much flexibility in the event of airport disruptions, greater leverage in airport negotiations, and the ability to differentiate the types of goods shipped from each.

Other hubs have also added or expanded middle-of-the-night flights. For example:

- Baltimore/Washington International (BWI) has new nighttime departures to Chicago–Rockford, IL; Miami, FL; and Nashville, TN.
- Fort Worth Alliance (AFW) has new flights to Las Vegas, NV; Portland, OR; St. Louis, MO; and Stockton, CA.
- San Bernardino International (SBD) has new flights to BWI, Boise, ID, and Seattle, WA.

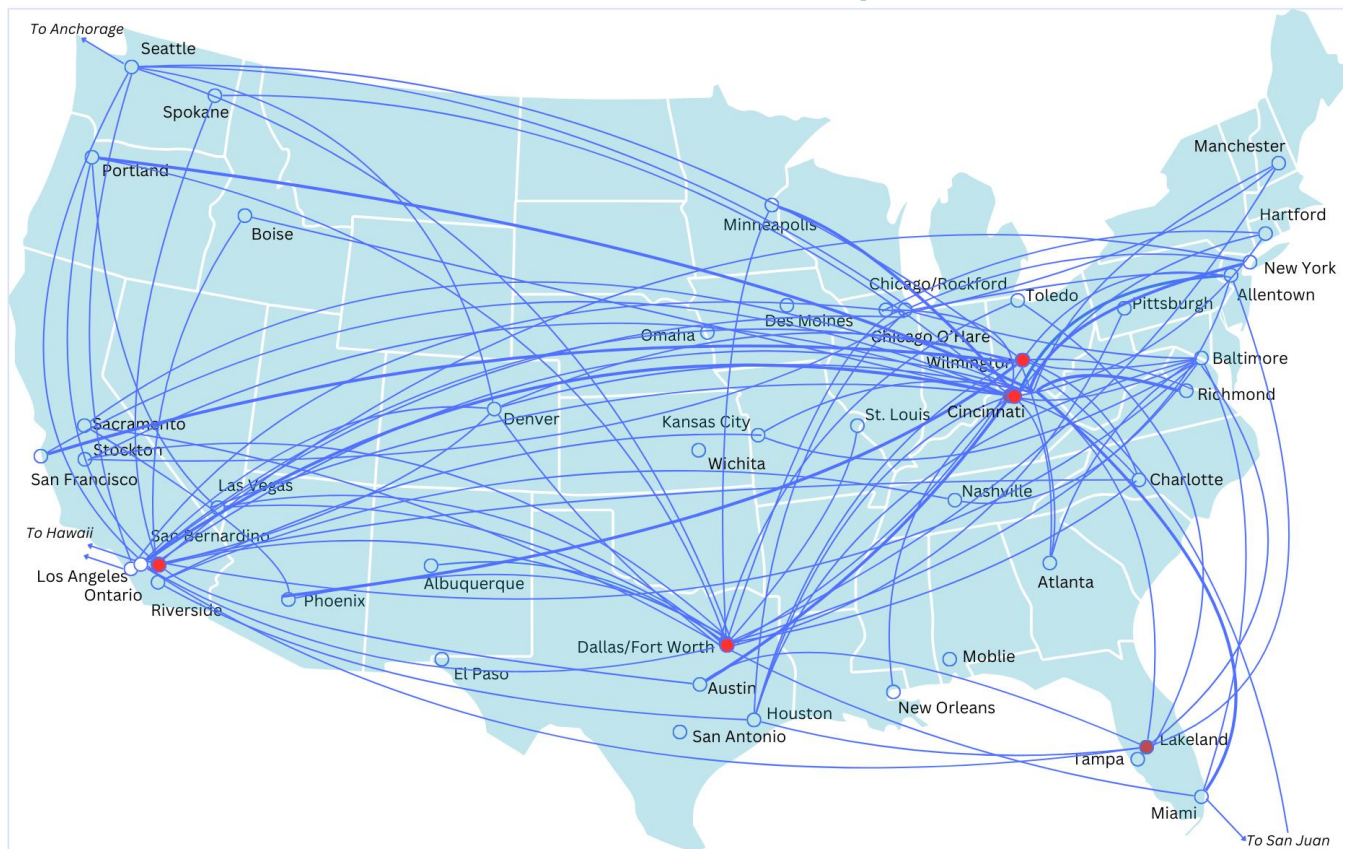
There are 307.7 million people in the U.S.

Mainland, or 92.5% of the mainland’s population, within 400 miles (air miles) of one of the Ohio Valley hubs (which makes same-day trucking trips feasible) or within 250 miles of an airport. When airports with early morning arrivals from Baltimore, Fort Worth, or San Bernardino are added, the proportion increases to 95.8%.

Salt Lake City is the only metropolitan region with a population greater than 1,000,000 not served based on these distances. However, a new flight arriving in Las Vegas from Fort Worth around midnight facilitates next-day deliveries. Because the 428-mile Interstate 15 trip from the gaming center to Salt Lake City is relatively uncongested, a truck driver can easily cover the distance in a single shift, reaching central Utah by midday. Most other metro areas not directly served have similar trucking options.

**FINDING 3.** Amazon Air has rapidly shifted away from short-haul flying despite its steady number of global flights. In the U.S., the proportion of flights with distances under 400 miles has been more than halved in the past two years and now accounts for just 5.1% of the total. Diminished regional flying is made possible by increasing reliance on trucks for short and mid-distance shipments.

**FIGURE 4: Amazon Air Route Network, U.S. Mainland, February 18, 2025**



Amazon Air's global flight activity barely changed over the past year, inching downward from 202 to 201 average daily flights (Figure 3). However, U.S. flight activity grew 2.9%, from 175.1 to 175.8 flights. Activity in Europe and India (where most flights are nocturnal) held steady at 15 and five, respectively, while Canadian activity dropped, albeit from a small base. However, Amazon Air is increasingly shying away from routes that trucks can cover in eight hours or less. The proportion of U.S. flights under 400 miles fell from 10.7% in 2023 to 6.2% in 2024 and just 5.2% this year. This drop is reflected in its evolving U.S. route map (Figure 4) and changing mix of flights from the Cincinnati CVG superhub, where short-hop nocturnal flights to Atlanta and St. Louis have been dropped. Fewer than 10% of its U.S. flights are under 500 miles, with some connecting the islands of Hawaii, where trucking is not an option.

Amid the push for trucking, no new U.S. airports have been added to Amazon Air's network since our 2023 brief. It has opted not to return to Des Moines, IA; El Paso, TX; Omaha, NE; and Wichita, KS, which it exited over a year ago.

Canada has a similar emphasis on long-haul flying. Routes of less than 400 miles have dropped to a much smaller extent than in the U.S., but they account for only about one-tenth of flights, and around 60% of flights are over 1,500 miles. In Europe, flights over 1,000 miles surged from 4.2% in 2023 to 11.8% in 2024 and 35.3% in 2025, while the proportion under 400 miles dropped slightly. In short, Amazon is deemphasizing shorter-distance routes in its supply chain.

**FINDING 4:** Amazon Air has emphasized hub expansion beyond Cincinnati CVG over the past year. The cluster of airports centering on California’s San Bernardino International saw significant expansion, positioning it as a critical transshipment point for goods arriving from the Pacific Rim and parcel shipments in the western U.S. Texas’s Ft. Worth Alliance has reclaimed its status as Amazon Air’s second-busiest airport.

A big story from 2022 to 2024 was the growth at the Cincinnati CVG “superhub.” However, that airport saw a modest decline in flight arrivals and departures over the past year, falling to 56 daily. Even so, it now has more long-haul and nocturnal flying and is a focal point for the A330s. Flight activity grew sharply in several other regions from early 2023 to early 2024 (Figure 5).

**Southern California.** A three-airport cluster comprising SBD, Ontario International (ONT), and Riverside’s March Air Reserve Base (RIV) saw flight activity grow from 34 to 40 average daily flights over the past year (Amazon Air plans to exit RIV later this year).<sup>4</sup> The cluster is less than 75 highway miles from the Port of Long Beach and Los Angeles International Airport, major gateways for goods shipped from China and the Pacific Rim. This grouping is second only to the Ohio Valley hubs (which have around 80 daily flights) in flight activity. SBD has regular A330 flights to Cincinnati CVG and New York.



A Boeing 767 freighter at San Bernardino in the summer of 2025

**Fort Worth Alliance.** Fort Worth’s bounce back is reflected in its growth from 21.4 to 29.4 average daily flights, with departures increasingly concentrated in the afternoon and late-night hours. In Houston, Amazon Air grew from 6.6 to 11.4 average daily flights, consistent with Amazon’s efforts to avoid overreliance on one airport around its key logistics centers.

**Eastern Seaboard.** Amazon Air is again prioritizing BWI, which was its largest hub in its early years. BWI’s rebound from 9.6 to 14.9 daily flights was abetted by new nocturnal flying. This push may signify the end of Amazon’s lack of large-scale hub development in the Northeast. For years, Amazon was apparently content to serve many customers in this region by trucks from the Ohio Valley. However, the roadblocks it encountered trying to create a hub in Newark, NJ, may have also been a factor. At Allentown, PA, which, like BWI, is surrounded by many warehouses, activity reached a new high of 9.4 average daily flights.

Amazon Air’s strategy in the Southeast has also shifted, with flights to Lakeland, FL, declining. In contrast, flights to the larger commercial airports in Atlanta, GA, and Miami, FL, have increased.



## FIGURE 5: Number of Daily Flights at Amazon Air Airports, 2020–2025

Total takeoffs and landings by airport, excluding partner flights

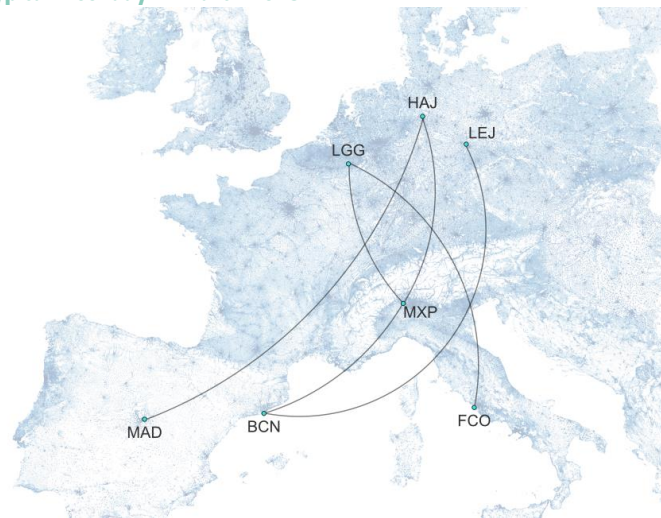
Airport	Earlier Time Periods- Amazon Air						Current
	April 2020	February 2021	March 2022	September 2022	February 2023	February 2024	February 2025
Albuquerque International Sunport (ABQ)			4.8	1.9	2	3.1	1.9
Allentown Lehigh Valley Int'l (ABE)	6	4.3	1.4	2.3	4.6	8.0	9.4
Anchorage Ted Stevens Int'l (ANC)	4	2.0	2	2	2.0	2.3	2.0
Atlanta Hartsfield-Jackson Int'l (ATL)	0	2.5	3.2	4	4.9	4.0	6.0
Austin-Bergstrom International (AUS)	0	4.2	5.8	6.1	5.9	7.7	7.6
<b>Baltimore-Washington Marshall Int'l (BWI)</b>	<b>6</b>	<b>10.5</b>	<b>19.2</b>	<b>18</b>	<b>14.6</b>	<b>9.6</b>	<b>14.9</b>
Boise (BOI)					2.0	2.0	2.0
Charlotte Douglas Int'l (CLT)			5	3.7	4.3	4.0	5.4
Chicago O'Hare International (ORD)	0	3.5	7.2	6	4.6	2.0	2.0
<b>Chicago Rockford International (RFD)</b>	<b>15</b>	<b>15.8</b>	<b>9.2</b>	<b>11.7</b>	<b>12.0</b>	<b>14.0</b>	<b>13.6</b>
<b>Cincinnati/Northern Kentucky Int'l (CVG)</b>	<b>24</b>	<b>27.8</b>	<b>25.6</b>	<b>43.9</b>	<b>57.7</b>	<b>63.3</b>	<b>56.0</b>
Denver International (DEN)	4	4.2	2.2	3.9	6.0	8.0	8.4
Des Moines International (DSM)			1.6	2	1.9	0.0	0.0
El Paso (ELP)				1.7		0.0	0.0
Fairbanks Int'l (FAI)			1.8	1.7	1.7	1.1	1.9
<b>Fort Worth Alliance (AFW)</b>	<b>8</b>	<b>17.2</b>	<b>36.6</b>	<b>29.9</b>	<b>34.1</b>	<b>21.4</b>	<b>29.4</b>
Honolulu Daniel K. Inouye Int'l (HNL)	4	3.8	5.6	3.1	4.0	4.1	4.0
Houston G. Bush Intercontinental (IAH)	9	10.0	3.2	3.6	3.3	6.6	11.4
Kahului (OGG)	2	1.8	2	1.7	2.0	1.4	2.0
Kailua-Kona/Kona International (KOA)	0	2.0	2	1.7	2.0	1.4	2.0
Kansas City International (MCI)			2.2	6.1	4.9	7.1	6.3
<b>Lakeland Linder International (LAL)</b>	<b>0</b>	<b>11.5</b>	<b>16.2</b>	<b>17.9</b>	<b>20.3</b>	<b>21.4</b>	<b>12.1</b>
Las Vegas (LAS)				2.6	4.0	1.7	4.3
Liuhe (LIH)				2	2.0	2.0	2.0
Los Angeles International (LAX)	0	2.0	6	3.7	2.0	3.9	1.7
Manchester-Boston Regional (MHT)					3.3	4.1	3.1
Miami International (MIA)	6	6.7	6.8	8.1	4.7	8.9	10.1
Minneapolis-Saint Paul International (MSP)	2	2.0	6	4.4	6.0	8.1	7.4
Mobile Regional Airport (BFM)					1.9	0.0	0.0
Nashville International (BNA)			3.8	4	2.0	3.7	4.1
New Orleans, Louis Armstrong Int'l (MSY)	0	2.0	2	2	2.0	2.1	2.0
New York John F. Kennedy Int'l (JFK)	0	8.8	8.2	4	6.0	6.0	6.0
Omaha EbbelEy (OMA)			2.4	2	1.4	0.0	0.0
<b>Ontario International (ONT)</b>	<b>13</b>	<b>20.5</b>	<b>12</b>	<b>12.4</b>	<b>9.3</b>	<b>10.6</b>	<b>12.7</b>
Phoenix Sky Harbor International (PHX)	4	9.5	6.2	4	4.0	2.3	5.7
Pittsburgh International (PIT)			6.2	2	2.0	2.0	2.0
Portland International (PDX)	6	10.5	13.8	12.4	9.3	7.1	8.9
Richmond International (RIC)	0	4.0	2	3.7	5.9	4.9	5.4
Riverside March Air Reserve Base (RIV)	4	6.5	9.2	5.4	4.1	3.0	6.3
Sacramento International (SMF)	4	4.5	2	2	0.6	6.0	5.7
San Antonio/Kelly Field (SKF)	2	2.0	2	4.1	1.7	3.4	3.3
<b>San Bernardino International (SBD)</b>			11	10.3	17.1	20.3	20.7
San Francisco International (SFO)	2	7.0	3.8	5.7	4.3	4.0	4.1
San Jose (Mineta) International (SJC)					2.9	0.0	0.0
San Juan Luis Muñoz Marín Int'l (SJU)	0	2.0	1.8	1.7	0.1	4.1	3.1
<b>Seattle-Tacoma International (SEA)</b>	<b>9</b>	<b>11.2</b>	<b>16</b>	<b>10.3</b>	<b>10.0</b>	<b>14.3</b>	<b>10.4</b>
Spokane International (GEG)			1.8	2	4.0	2.0	2.0
St. Louis Lambert International (STL)			1.8	4.3	1.9	1.7	2.0
Stockton Metropolitan (SCK)	4	6.2	4.8	4	4.0	3.4	3.3
Tampa International (TPA)	16	13.2	6	8.1	4.7	0.0	0.0
Toledo Express (TOL)			4	4	4.0	3.1	3.9
Wichita (Eisenhower National) (ICT)			1.2	1.4	4.0	0.0	0.0
<b>Wilmington Air Park (ILN)</b>	<b>13</b>	<b>14.8</b>	<b>24.2</b>	<b>20.4</b>	<b>15.3</b>	<b>20.6</b>	<b>18.0</b>
Windsor Locks Bradley (Hartford) (BDL)	2	8.0	5.6	10	4.3	4.1	3.1
<i>Outside United States</i>							
Canadian Airports			10.2	10.0	10.3	13.7	7.4
Asia Pacific Airports (India-only after 2023)	1				9.1	10.0	10.4
Western Europe Airports	0	16.8	36.4	44.3	48.0	30.0	30.0
<b>Total takeoffs &amp; landings</b>	<b>170.0</b>	<b>279.3</b>	<b>374.0</b>	<b>388.2</b>	<b>410.7</b>	<b>403.1</b>	<b>401.4</b>
<b>Total flights</b>	<b>85.0</b>	<b>139.7</b>	<b>187.0</b>	<b>194.1</b>	<b>205.3</b>	<b>201.6</b>	<b>200.7</b>



**FINDING 6.** Amazon Air’s European network increasingly focuses on point-to-point service from the Golden Triangle logistics hub around Liege, Belgium, and northern Germany. Three-fourths of flights originate or terminate in this strategically important region for distribution and transportation.

The European network generally has 12 daily flights, except on Saturdays, when it is bereft of scheduled flight activity. All flights are operated by its ASL Ireland contractor using B737-800s. Amazon Air continues to de-emphasize hub development on the continent. It is instead doubling down on point-to-point flying at airports within or near the Golden Triangle, a region bounded by Amsterdam, NL, Frankfurt, DE, and Paris, FR, serving a critical and pivotal role in global logistics. Two-thirds of all European freight is handled in this area. Amazon Air has two regular routes from Liege (LGG), near the Triangle's center and close to major manufacturing, distribution, and transportation facilities. It also serves northern Germany's Hannover Airport (HAJ), which has a catchment area that includes large parts of the triangle.

**FIGURE 6: Amazon Air’s European Network**  
Typical weekday in March 2025



Several patterns warrant emphasis:

- Three-fourths of Amazon Air flights now serve the Golden Triangle. The shift to the region was accompanied by a gradual move away from Leipzig/Halle Airport (LEJ) in eastern Germany starting in 2023. LEJ once seemed poised to become Amazon Air’s preeminent European airport, partially due to its synergy with DHL’s large hub. However, Amazon Air largely relocated its LEJ activity to Hannover and Liege, which are better positioned for European logistics. Only one route remained in Leipzig, currently the connection to Barcelona (BCN).
- Amazon Air’s 12 daily flights, Sunday through Friday, is less than one-third of what it had in 2022. Milan, IT (MXP) remains Amazon Air’s busiest airport, with six daily flights. Still, its flights are not organized in departure banks.
- Its consolidation to more centralized parts of the Triangle appears to have spurred its recent and surprising exit from the Paris Charles de Gaulle Airport (CDG), just 207 highway miles from Liege.

Another notable development is Amazon Air’s return to Cologne, Germany; Flights now link Cologne to Larnaca, Cyprus (LCA), and Malta (MLA), both Mediterranean island locations. However, none of the flights match the schedule pattern of the previous Amazon network in Europe, arriving in Cologne (CGN) in the late evening and departing in the early morning to Larnaca and Malta. Amazon Air has been flying exclusively during the daytime in Europe since mid-2023. UPS operated both routes before flights began using Amazon Air-branded aircraft, suggesting that they are primarily operated for the American air cargo

integrator. Whether Amazon Air or ASL Ireland is the contractor for this service remains uncertain. (The service is not included in our estimate of 12 daily flights.)

Europe's rapidly changing route map (Figure 6) reflects its gradual reduction in short-distance flights and increasing reliance on highway transport to locations within a one-day truck trip. The declining utilization of its European fleet of nine B737-800s is partially offset by the apparent use of one for UPS. For a more extensive analysis of Europe's network, see our [2024 report](#).

## SHORT-TERM OUTLOOK AND PREDICTIONS

Amazon Air's push into third-party delivery and greatly expanded widebody capacity makes it an increasingly visible player in the air cargo scene. The unit is more open about publicly sharing details about its operations and becoming more active in long-range airport facility planning. Press releases about aircraft deliveries, presentations at major air cargo conferences, and information about some of the non-Amazon customers have become more common. We offer several predictions.

**Prediction 1: Amazon Air will continue prioritizing late-night and early-morning flights in the domestic U.S. as it refines schedules to facilitate next-day delivery.** We expect even more nocturnal departures at Cincinnati CVG, Wilmington Air Park, and other U.S. hubs. While still small, emerging nighttime departure clusters at Baltimore, Fort Worth, and San Bernardino will likely grow, reflecting a move away from an almost singular focus on expanding CVG. The share of nocturnal flying (11 pm to 6 am) could top 40% by next year, greater than any other point we observed since we began our reviews in 2020.



Boeing 737-800 at Milan Malpensa Airport in early 2024 (M. Dascalu photo)

**Prediction 2: Amazon Air's fleet size and mix will change little over the next several years. However, increasing utilization and reactivating parked aircraft will allow for another capacity boost, with expansion heavily comprised of long-haul U.S. routes.** Although Amazon Air's fleet grew from 93 to 99 over the past year, around a dozen planes are parked, including two newly received A330s.<sup>5</sup> This gives Amazon Air ample opportunity to expand its available ton-mile capacity. The phasing out of Atlas as a contractor raises questions about the disposition of its remaining eight planes devoted to Amazon Air. Still, we expect most of these aircraft to continue flying for the unit.

Last year's fleet expansion, without a commensurate rise in flight miles, indicates that Amazon values having extra aircraft on hand to deal with supply chain emergencies and uncertainties. The advanced age of many of its aircraft (many are over 30 years old) reduces the opportunity cost of having spare equipment on hand for such contingencies. Even so, we expect the number of U.S. flights will grow by 3-4% over the next year and available ton-miles rising around 5% in the domestic market, fueled by more widebody flying for third parties.

**Prediction 3: The airport pairs in the Ohio Valley and Southern California will dominate the aviation supply chain due to their proximity to vast warehouse agglomerations and synergy with other transportation modes. At the same time, Amazon Air will stay committed to having a multi-hub U.S. network.** The Southern California cluster, dominated by SBD and Ontario International, is poised for additional growth and has nearly twice the flight activity of any other multi-airport cluster except the Ohio Valley logistics center. These West Coast airports will be pivotal for expanding third-party shipments due to the enormous role of metropolitan Los Angeles in the international air cargo and maritime sectors. Amazon Air's exit from Riverside, CA, will likely boost SBD and Ontario, which have been priority locations for warehouses and fulfillment.

**Prediction 4: Amazon Air's push into third-party shipping will emphasize larger shipments instead of small parcel delivery. The directional imbalances in traffic it faces at its major hubs incentivize it to pursue this bulk traffic more aggressively.** Several factors indicate that it is positioning itself for bulk shipments, including cargo consolidated into unit loading devices rather than goods in smaller aggregations, for third parties: i) the growing average payload of Amazon Air's planes, ii) its emphasis on long-haul flying, and iii) its restraint in adding new airports to its route map and choosing instead to increase the density of the rest of the network. Although earlier phases of its third-party marketing emphasized "Fulfillment by Amazon" and other business-to-consumer offerings, Amazon now appears to be increasingly eyeing general cargo shipments. Our [analysis](#) shows that a particularly large amount of inbound flight capacity at major hubs is likely available. The recent softness in the online shopping sector abets this shift. and the risk of rising tariffs on imports or a recession adds uncertainty to the trajectory of its third-party expansion. Still, the next two years will be pivotal for third-party shipments.

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*This Brief is prepared as an extension of the Chaddick Institute's mission to promote public understanding of the evolution of transportation systems. The findings are based entirely on the Chaddick Institute's independent analysis of publicly available data, without proprietary Amazon data or perspective. Any opinions expressed are those of the authors.*

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Please [click here](#) for our eight earlier Amazon Air Briefs and our November 2024 brief on directional imbalances in cargo tonnage at major cargo airports.

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## ENDNOTES

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<sup>2</sup> The estimates in Figure 3, which are used to compute the growth rate, are based on flights from March 18-24, 2025 versus comparable months in previous years.

<sup>3</sup> The analysis of active and parked plans is based on Planespotter.com listings on March 5, 2025.

<sup>4</sup> For media reports on the Riverside exit, please refer to the Riverside Patch article [here](#).

<sup>5</sup> Our fleet estimate is based on Amazon Air listings on planespotters.com, with the inclusion of one Boeing 737-300 listed as being operated for Amazon Air by India-based Quickjet that is not listed on the Amazon Air planespotters.com page. Our fleet estimates do not include possible flights operated on planes belonging to contractors that are not registered as or branded as being part of Amazon Air but are used for Amazon missions. Our analysis, based on flights between Amazon Air airports, indicates that such “partner flights” are fewer in number than several years ago, but there is uncertainty about this.

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