

# DFW International Airport Air Cargo Overview

ACI-NA 2017 Fort Worth , Air Cargo Committee



# The DFW opportunity

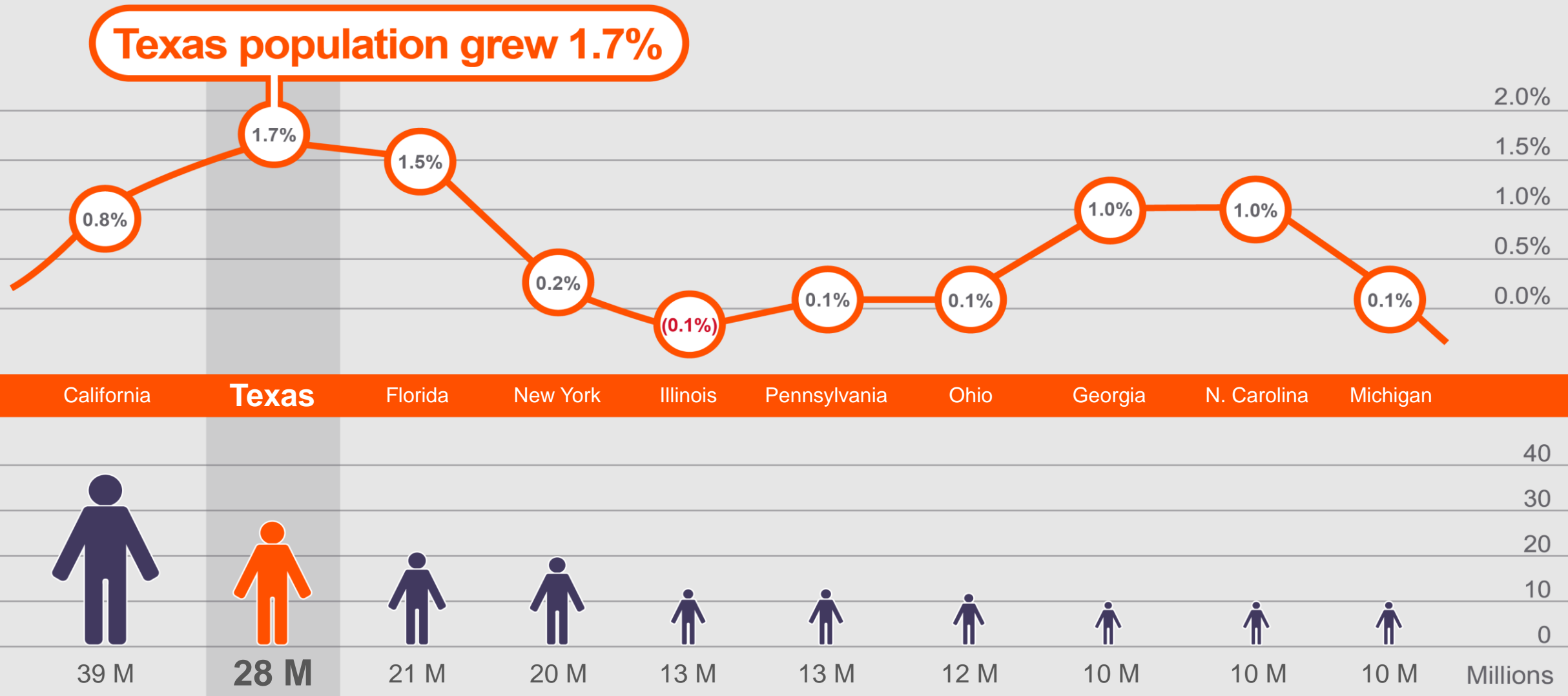
Three trends driving cargo growth in DFW and Texas

- Texas and DFW trade with the world
- South America and Mexico originating growth
- Global demand growth in the perishables sector

# Texas and DFW market

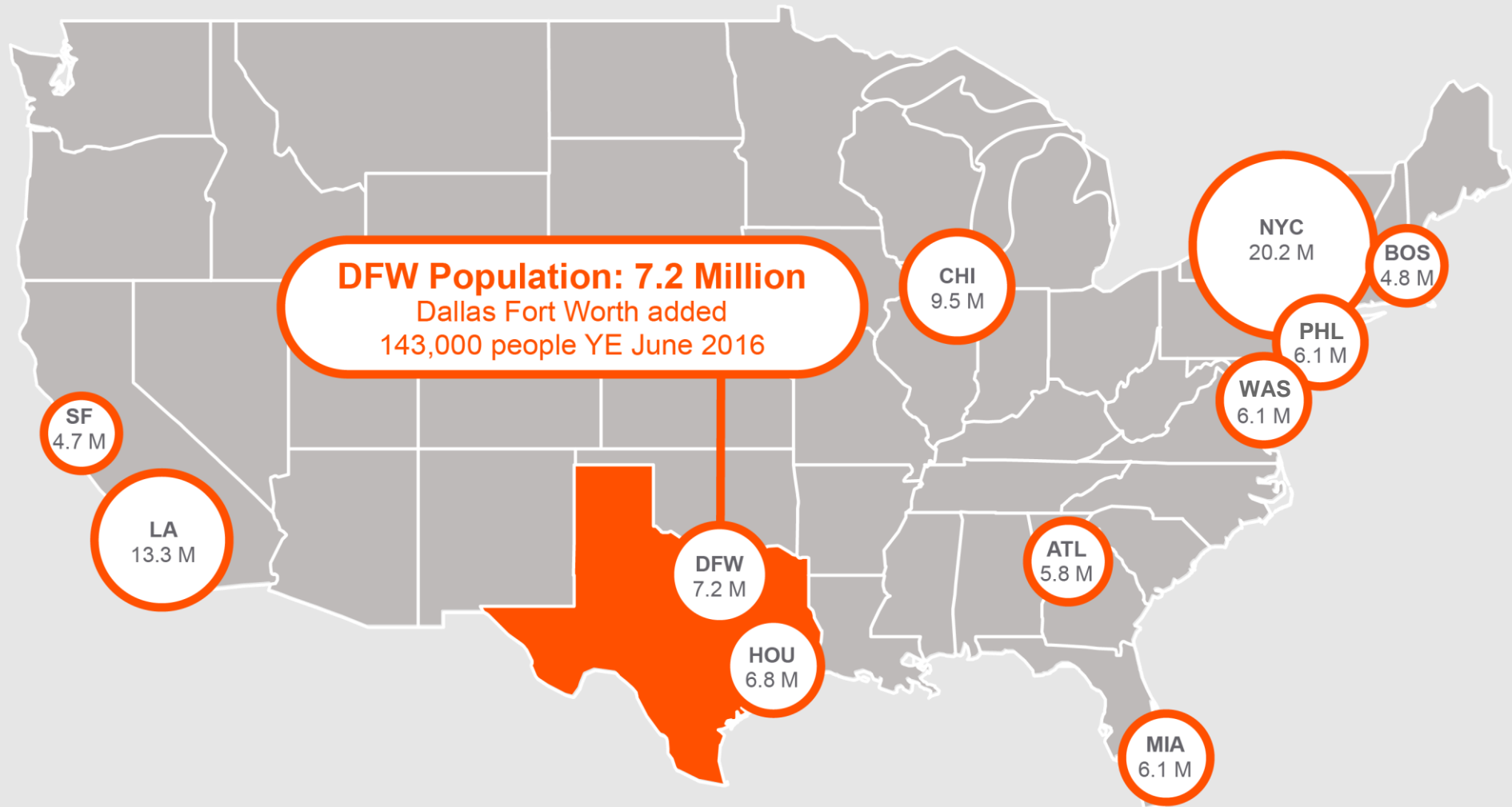
Economic diversity, growth, and advantages

# Most new residents in Texas in 2016



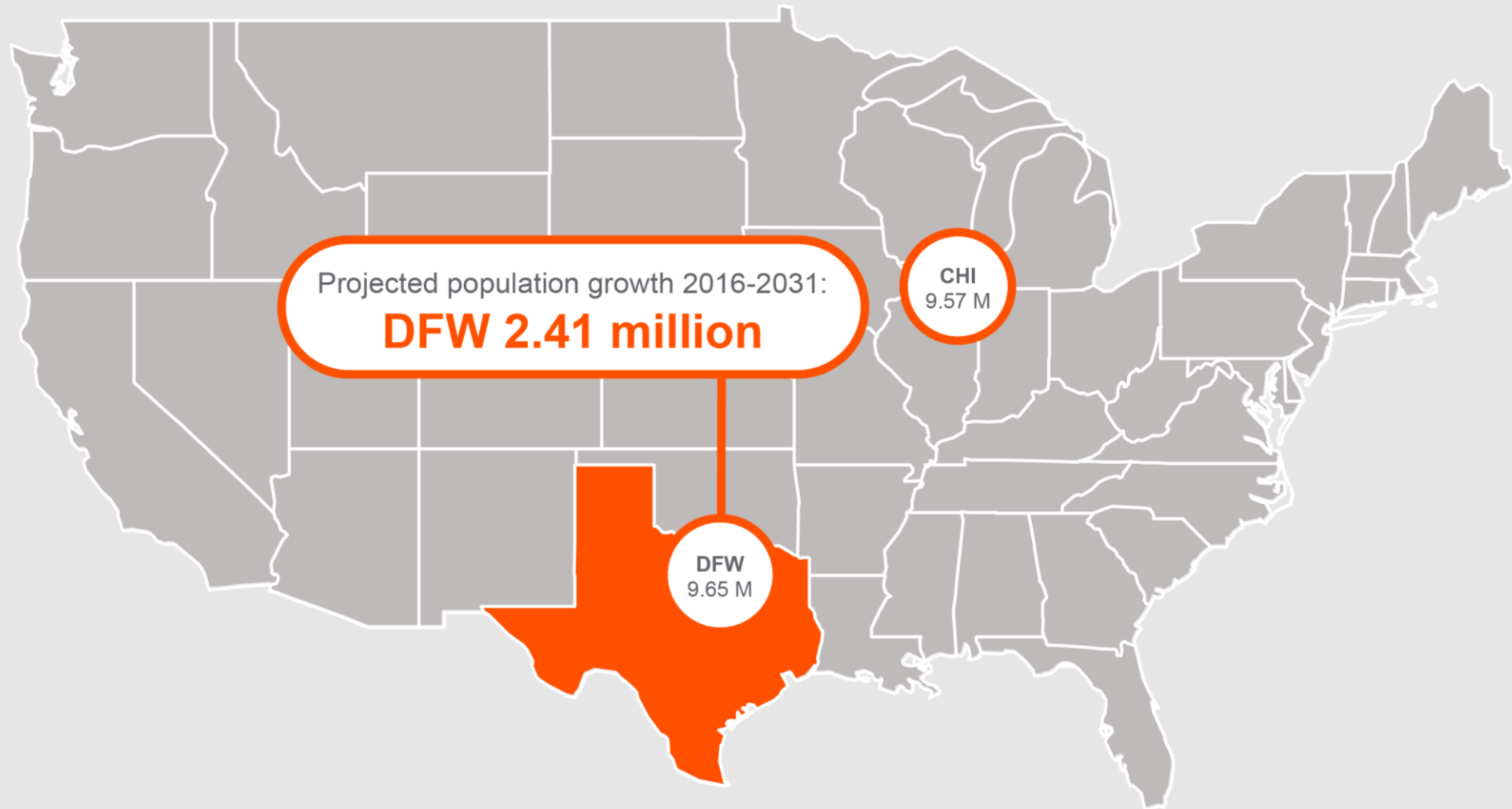
Source: U.S. Census Bureau, Annual Estimates of the Resident Population (as of July 1, 2016)

# Dallas Fort Worth is the 4<sup>th</sup> largest metropolitan area

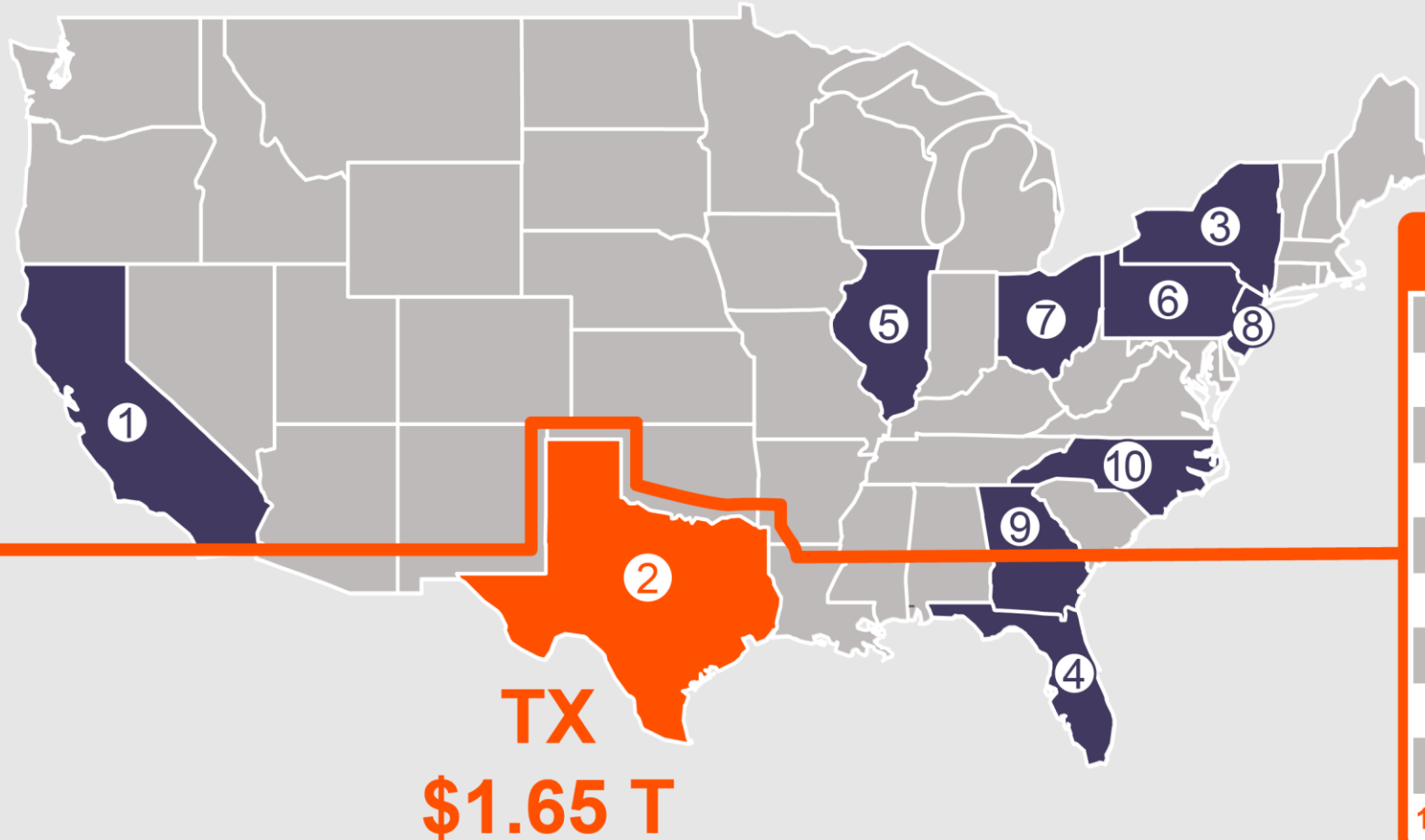


Source: U.S. Census Bureau, Annual Estimates of the Resident Population (as of July 1, 2016)

# Dallas Fort Worth population to surpass Chicago



# Texas has the 2<sup>nd</sup> largest economy in the US



GDP in U.S.\$ Trillions		
1	California	\$2.66
2	Texas	\$1.65
3	New York	\$1.49
4	Florida	\$0.95
5	Illinois	\$0.80
6	Pennsylvania	\$0.74
7	Ohio	\$0.64
8	New Jersey	\$0.59
9	Georgia	\$0.53
10	North Carolina	\$0.53

# Texas and Dallas Fort Worth as global economies

RANK	COUNTRY	GDP 2016 (U.S.\$ TRILLIONS)	5-YR CAGR (2010-2016)
1	United States	\$18.57	3.7%
2	China	\$11.22	8.3%
3	Japan	\$4.94	(4.3%)
4	Germany	\$3.47	(1.6%)
5	United Kingdom	\$2.63	0.1%
6	France	\$2.46	(3.0%)
7	India	\$2.26	4.4%
8	Italy	\$1.85	(4.1%)
9	Brazil	\$1.80	(7.2%)
10	<b>Texas</b>	<b>\$1.65</b>	<b>3.6%</b>
11	Canada	\$1.53	(3.1%)
12	Korea, Rep.	\$1.41	3.3%
13	Russian Fed	\$1.28	(8.8%)
14	Australia	\$1.26	(3.5%)
15	Spain	\$1.23	(3.7%)
16	Mexico	\$1.05	(2.2%)

RANK	COUNTRY	GDP 2016 (U.S.\$ TRILLIONS)	5-YR CAGR (2010-2016)
17	Indonesia	\$0.93	0.9%
18	Turkey	\$0.86	0.6%
19	Netherlands	\$0.77	(2.9%)
20	Switzerland	\$0.66	(1.1%)
21	Saudi Arabia	\$0.64	(1.0%)
22	Argentina	\$0.55	0.7%
23	Taiwan	\$0.53	1.7%
24	Sweden	\$0.51	(1.9%)
25	<b>Dallas Fort Worth*</b>	<b>\$0.49</b>	<b>5.2%</b>
26	Poland	\$0.47	(2.4%)
27	Belgium	\$0.47	(2.4%)
28	Thailand	\$0.41	1.9%
29	Nigeria	\$0.41	(0.4%)
30	Austria	\$0.39	(2.1%)
31	Iran	\$0.38	(7.9%)
32	UAE	\$0.37	1.3%

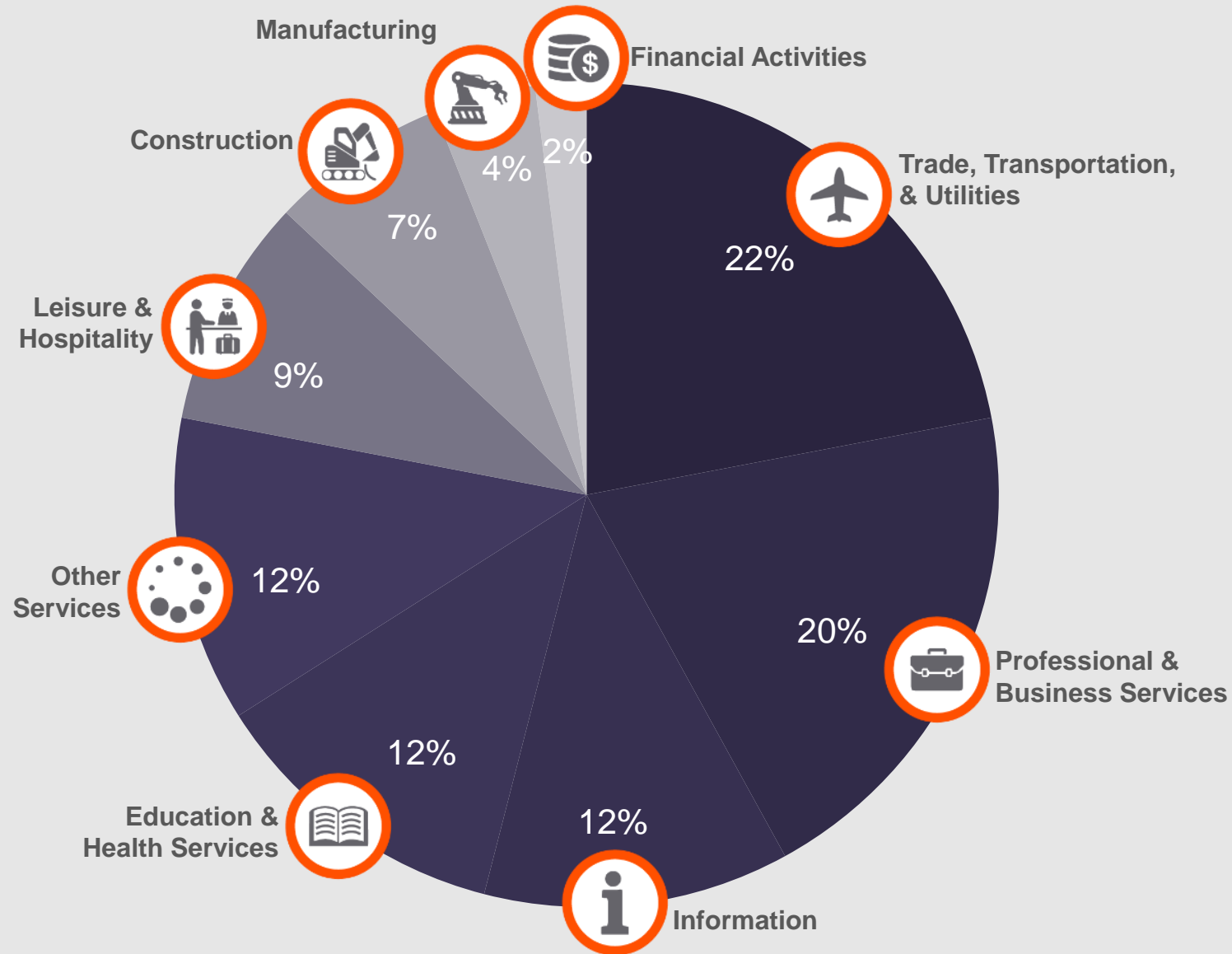
Source: World Development Indicators database, World Bank, 22 July 2016

\*Source: Bureau of Economic Analysis (Gross State Product) for 2016

CAGR represents compounded annual growth rate



# Diverse industry sectors in Dallas Fort Worth



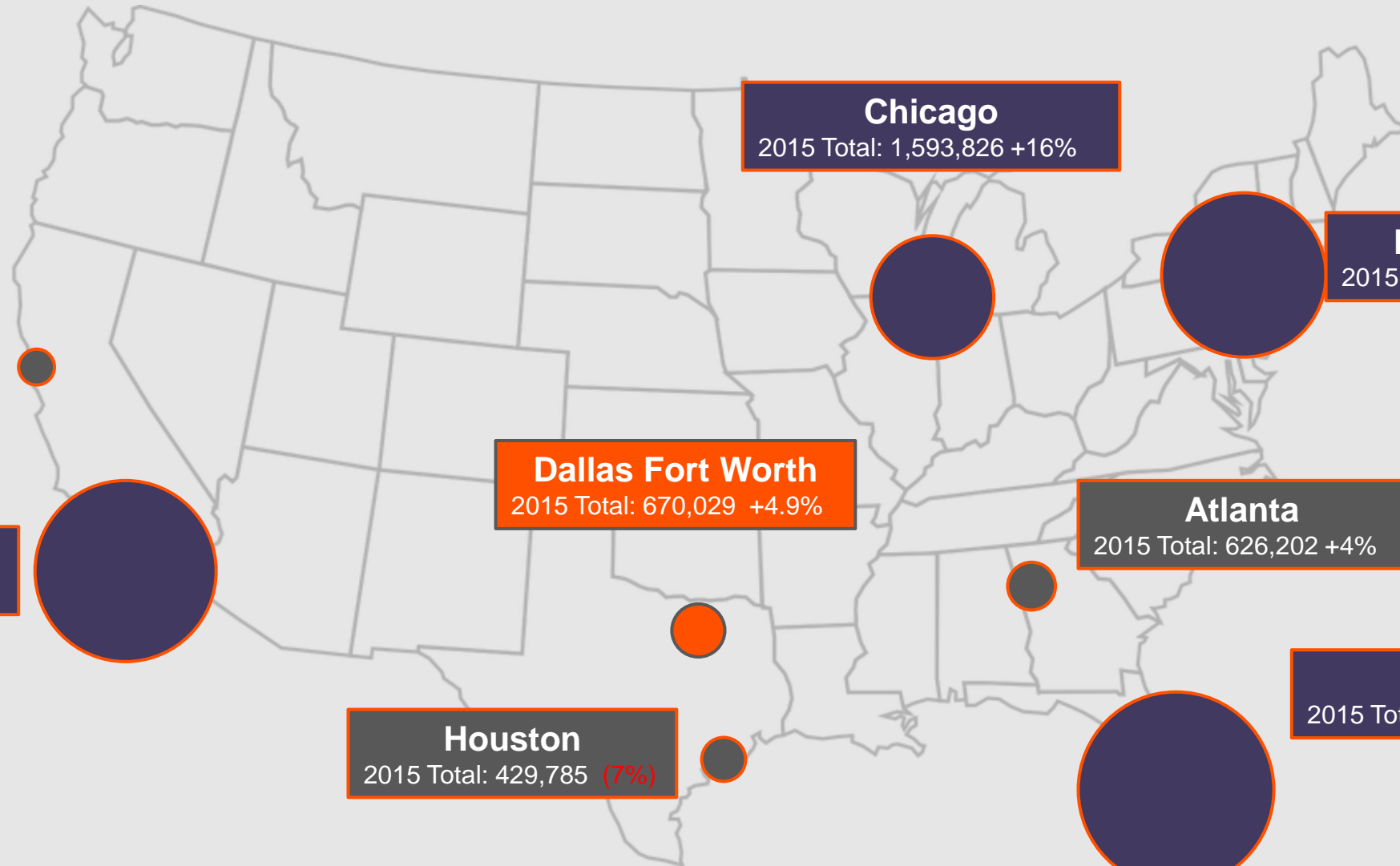
Source: Dallas Regional Chamber; Fort Worth Chamber of Commerce; Texas Workforce Commission; Bureau of Labor Statistics

# DFW Airport and the air cargo community

# DFW's air cargo growth strategy was developed in alignment with the way that freight is transported



# DFW as a cargo gateway today

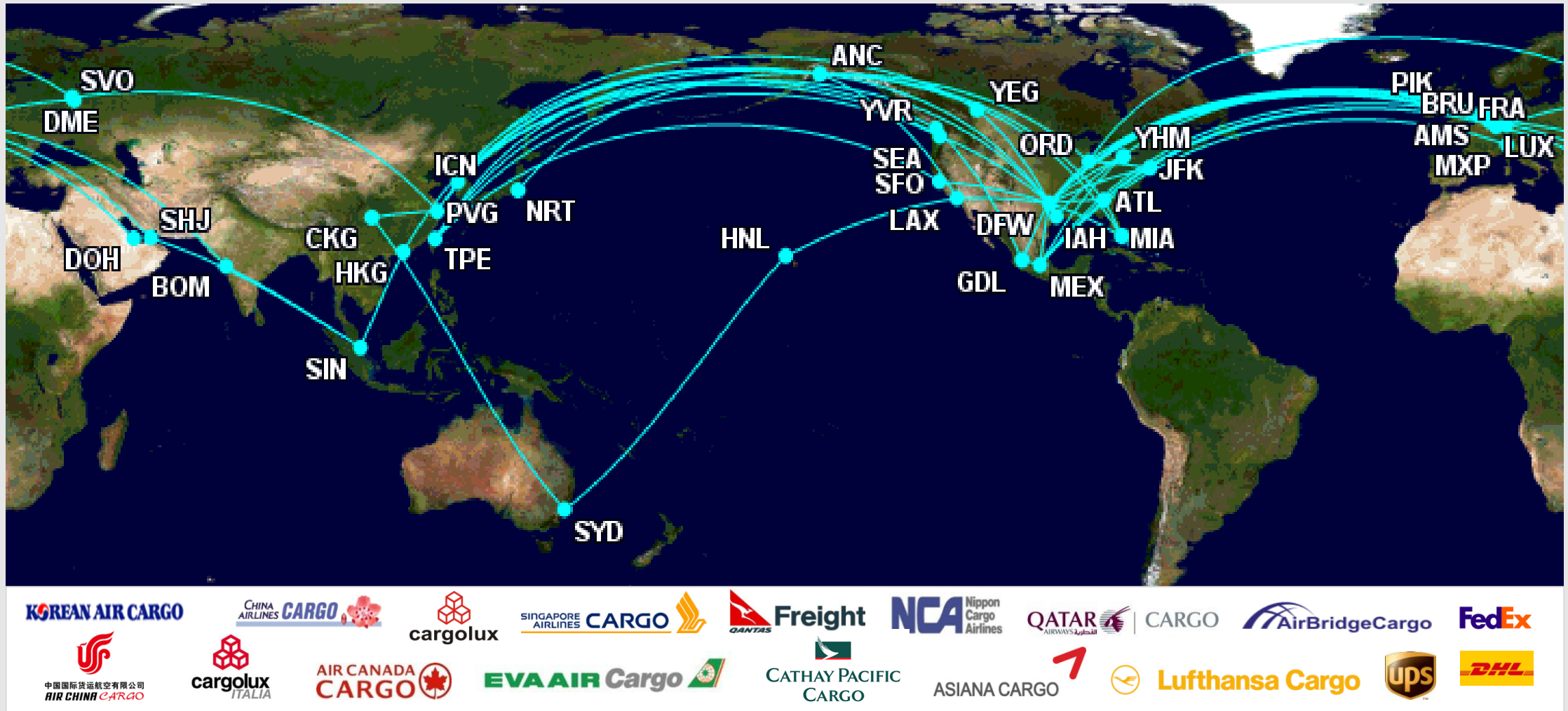


Figures in Metric Tons

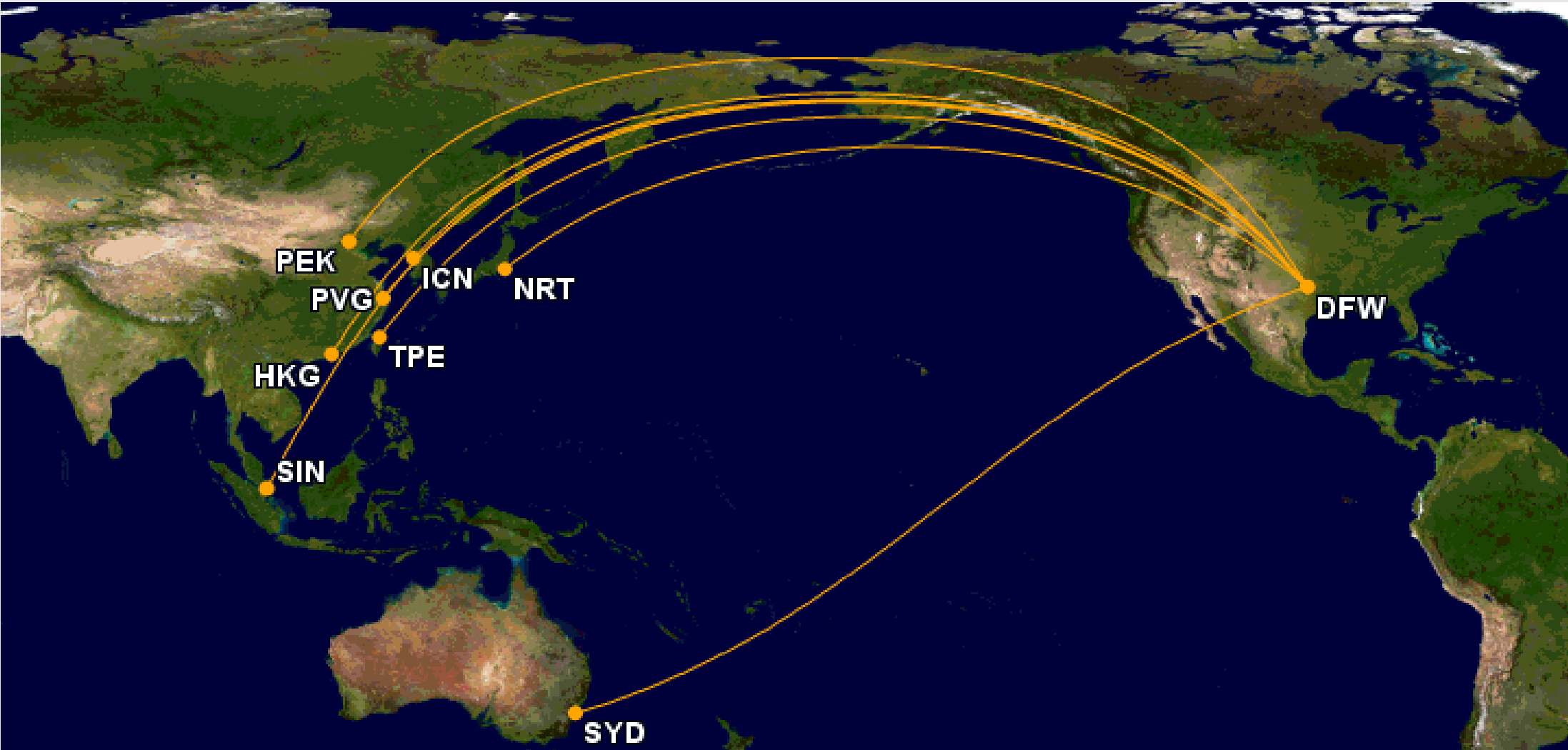
Growth Rate equals Compound Annual Growth Rate for 2007 - 2014

Source: Airports Council International–North America, traffic figures reported by member airports for the years noted.

# Freighters bring extensive global network to DFW

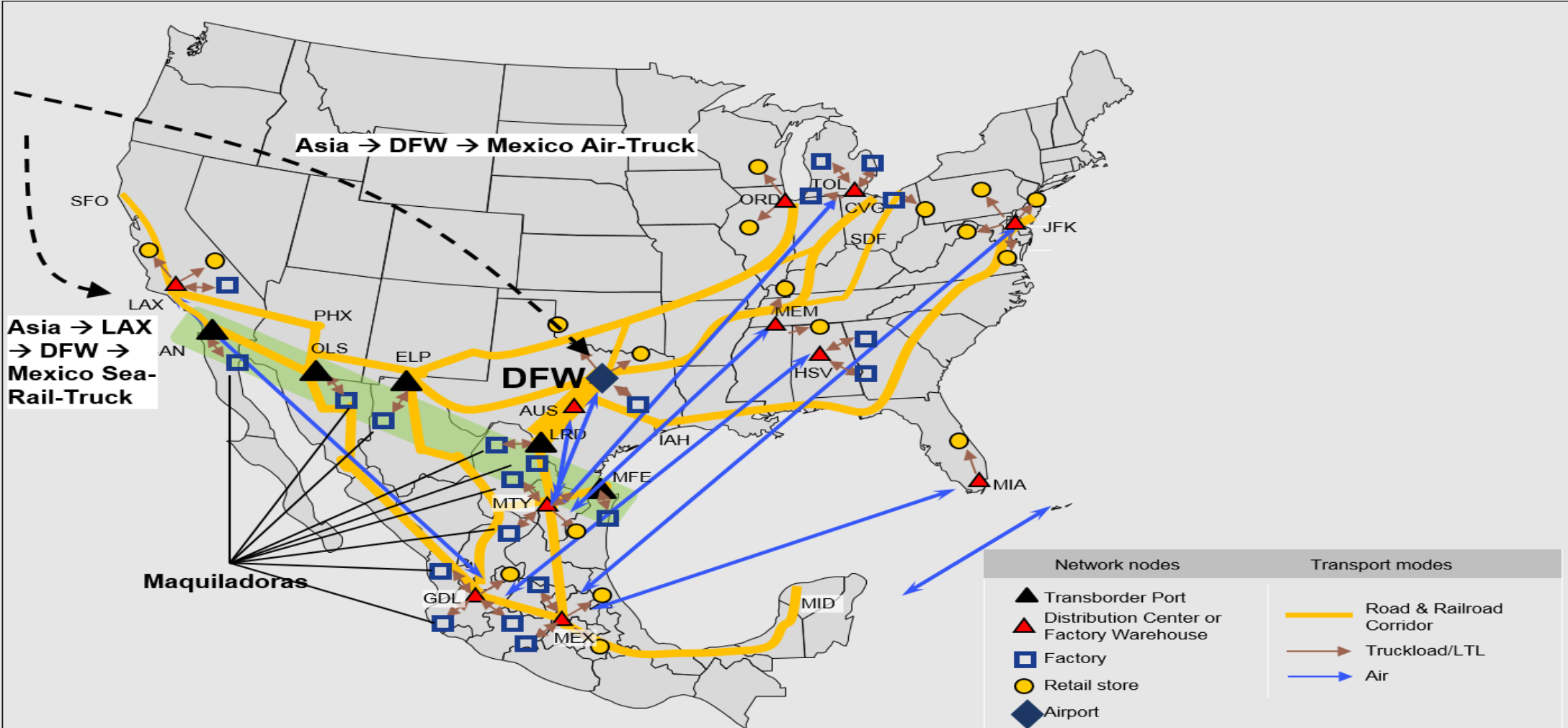


# DFW's air cargo network strength lies in Asia-Pacific



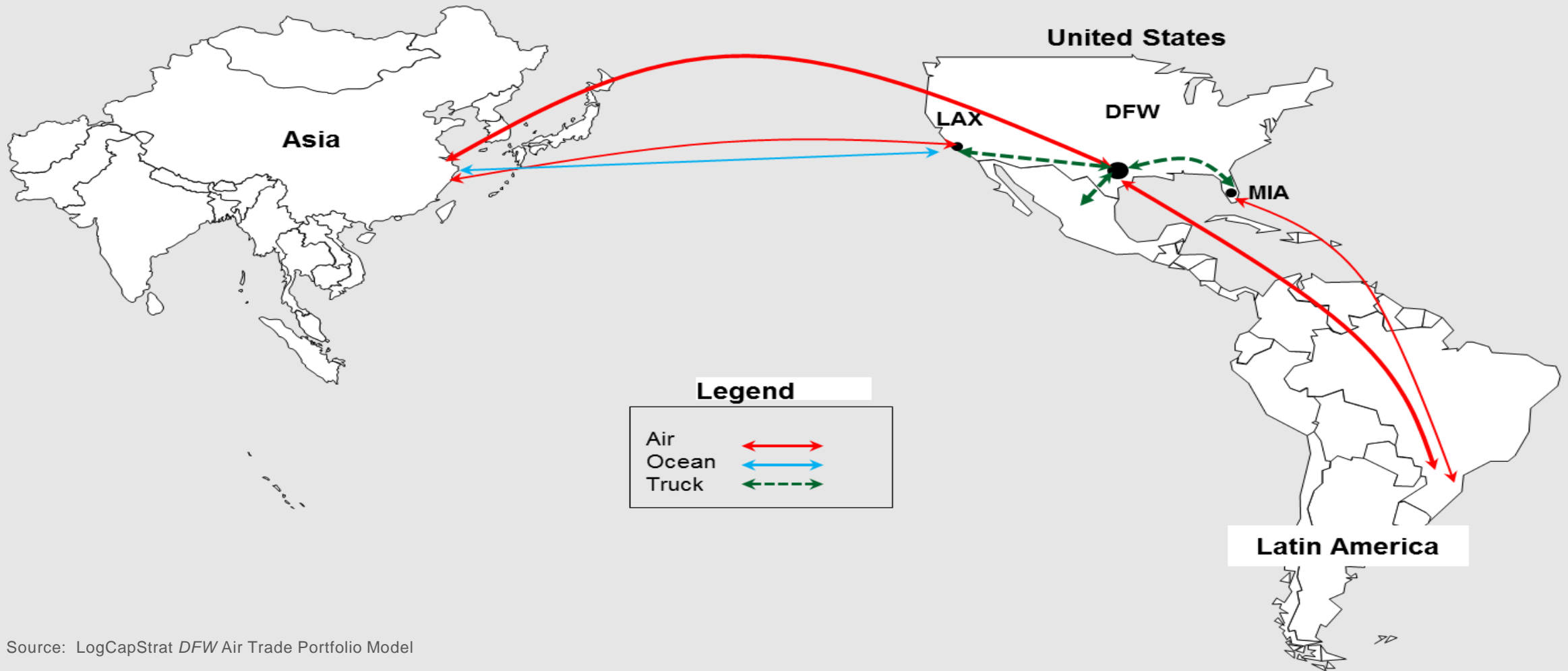
# Strengthen DFW's position in trans-border trade lanes

ILLUSTRATION OF MEXICO – US SUPPLY CHAIN



Source: LogCapStrat Analysis

# Establish DFW as a viable transit gateway between Latin America and Asia



Source: LogCapStrat DFW Air Trade Portfolio Model



# Proposed air cargo development plan for West Area Cargo



# One Stop Perishable Handling Solution



## RELATIONSHIPS



## EXPERTISE & PROVEN RESULTS



FIRST MILE, CUSTOMIZATION, LAST MILE

**dnata** Cool Chain

**DFW**

# Drivers of air cargo growth at DFW

- Perfect geographic gateway to North and South America
- Fast growing and diverse economy
- Unconstrained and highly-efficient airport infrastructure
- Ample land for commercial development
- Easy and convenient set up for FTZ sites
- Abundance of available logistics sites within close proximity to airfield
- Relatively low cost of real estate compared with other regions

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Questions?

