

Chicago O'Hare International Airport



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CHICAGO IS A CENTER OF COMMERCE

- Strong DNA for business and transportation thanks to central geography and massive infrastructure
- Waterways first → Then handling 50%+ of nation's rail freight → Airport system built around this legacy
- Today nearly 40% of U.S. market within a one day truck drive of Chicago → I-55, I-57, I-80, I-88, I-90, I-94

U.S. MANUFACTURING PLANTS
AND DISTRIBUTION CENTERS



U.S. RAIL FREIGHT TRAFFIC INTENSITY



O'HARE MASTER PLAN (OMP)

9L-27R
Completed 2008

NATCT
Completed 2008

9C-27C
Anticipated by 2020

9R-27L Extension




Taxiway LL

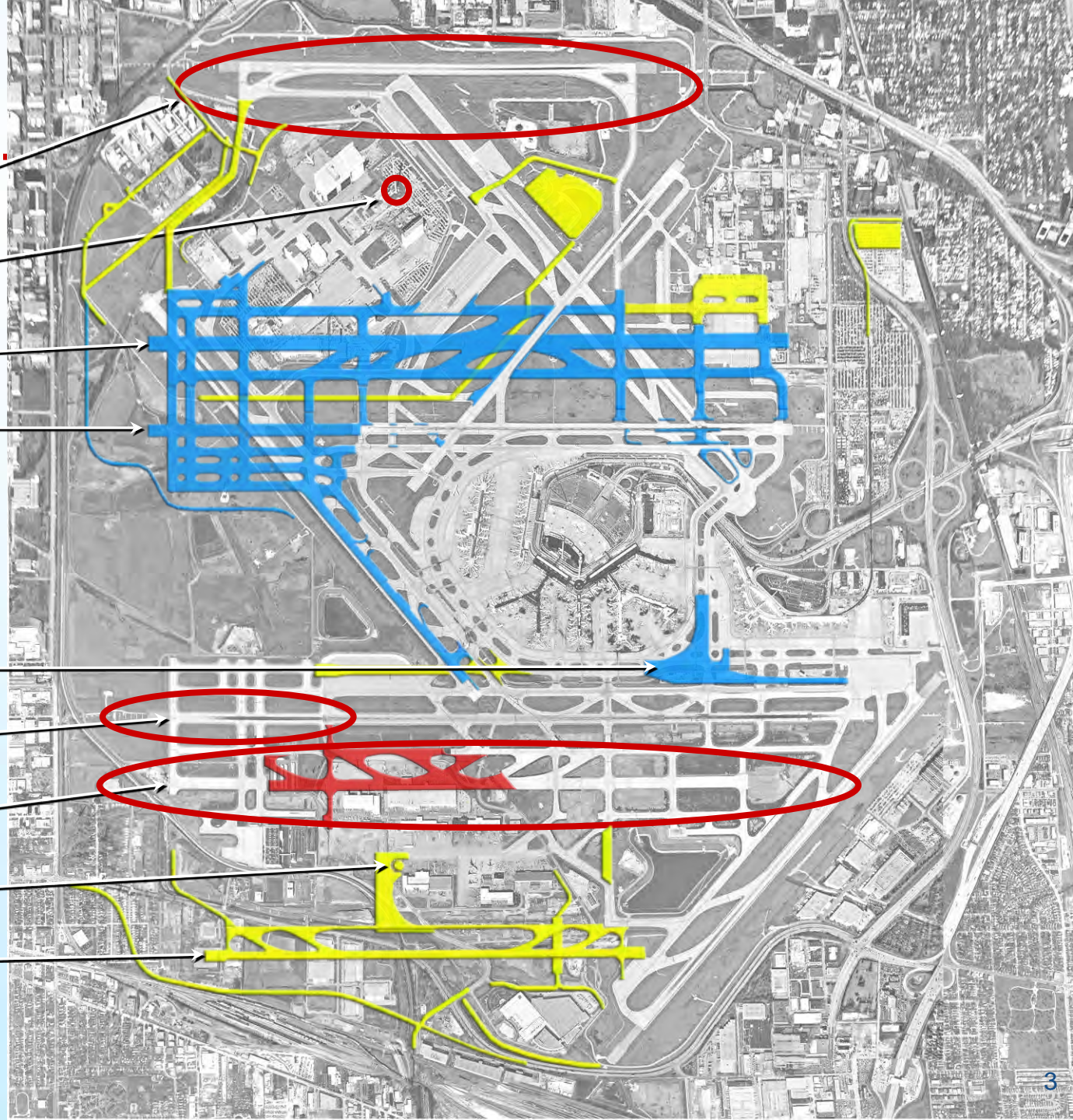
10L-28R Extension
Completed 2008

10C-28C
Completed 2013

SATCT
Completed 2015

10R-28L
Completed 2015

 **Phase 1**
 **Completion A**
 **Completion B**



CHICAGO DEPARTMENT OF AVIATION



Runs both O'Hare and Midway International Airports:

- 50,000 employees → worth \$50B/yr to economy
- AA/UA/WN hubs → 100M pax and 1M+ flights/yr

GLOBAL CARGO HUB AT O'HARE



- 1.6M+ tonnes of cargo handled annually (record levels now)
- #6 in the Americas and #17 in world in by tonnage (ACI rankings)
- #2 cargo airport in Americas by value (\$170B in imports/exports per yr)
- Only LA Port, Laredo Bridge, and JFK process more cargo in value
- 2M SF airside facilities (4M SF total) with ramp parking for about 40 jumbo freighters

O'HARE IS A GLOBAL TRADE NEXUS

- Air cargo carries something like 1% of world trade by volume, but it represents by far the most valuable, pressing, and leading goods that drive a metropolitan or regional economy
- About \$45B per year in air cargo exports departing through O'Hare:
 - Top export is medical equipment and medicines (35%)
- About \$125B per year in air cargo imports arriving through O'Hare:
 - Top import is electronic goods and supplies (30%)
- Flagship cargo gateway to U.S. for several overseas carriers
- About 30% of all O'Hare trade by value is with China
- Large hinterland to west and south of O'Hare directly related to air trade
 - Distribution centers
 - Manufacturers
 - Freight forwarders
 - Trucking companies
 - Importers/exporters
- “Edge city” of Rosemont based on O'Hare location



STAY COMPETITIVE AND ABLE TO GROW

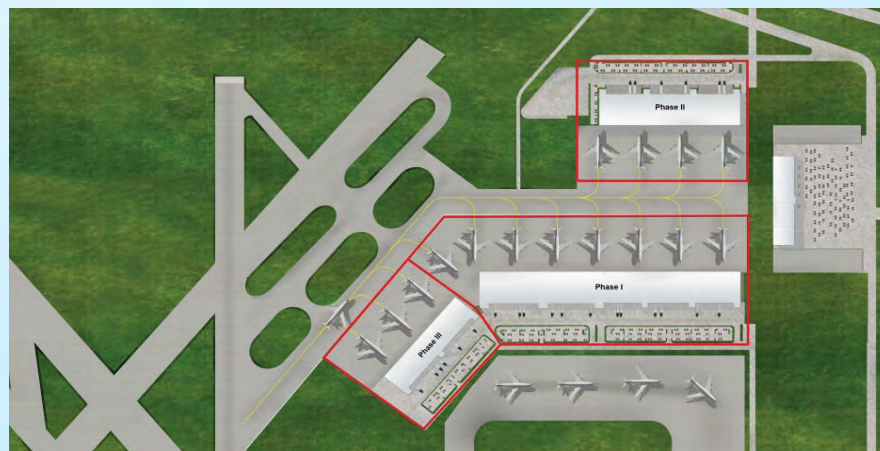
Major investments in O'Hare's infrastructure:

- Master Plan and O'Hare Modernization Program
- New Cargo Campus (Northeast Airfield)



O'HARE NORTHEAST CARGO CAMPUS

- Goal was 50% more capacity
- Site is old military area
- Developer is Aeroterm (RFP)
- \$200M and 1,000+ jobs
- 65 acres with 800,000 SF of facility space - all B747-8F
- Access to I-90, I-190, I-294
- LEED/SAM + close to amenities for workers
- 10 yrs = inception to opening day (surviving recession)
- Phases I and II complete



O'HARE NORTHEAST CARGO PHOTOS



NEW FEDEX CAMPUS (SOUTHWEST)

- OMP coordinated relocation to build new runway
- 300,000 SF Sort Building opened in 2011
- 175,000 SF Green Roof



NEW UA CARGO CAMPUS (SOUTH CENTRAL)

- OMP also coordinated relocation to build new runway
- United Cargo opened in new facility in 2012



BRIGHT FUTURE BUT GROWING PAINS

The bottom line for O'Hare cargo:

- 50% more freighter capacity now is a game-changer
- Prepared for e-commerce whether freighter or belly
- Over 1M SF of new sustainable Class A facilities (all B747-8F)
- Good airside-landside connection (location)
- Airfield configuration supports (Group VI runways)
- Handlers are the new cargo tenants
- Good planning and relations start with the airport authority

Ongoing issues for O'Hare cargo:

- North-South connectivity
- Ramp control
- Truck routes and staging (traffic)
- Perishable imports

