

Part Three

# World-Class Infrastructure, Focus on the Airports

## Dallas-Fort Worth: A Premier Inland Logistics Hub

The Dallas-Fort Worth (DFW) metroplex is not only a major national logistics hub but also a global gateway for commerce, thanks to its world-class airports. These airports—DFW International Airport, Love Field, and Alliance Airport—are pivotal in facilitating the movement of goods, supporting the industrial sector, and driving regional economic growth. Each airport plays a unique role in the region's logistics ecosystem, collectively reinforcing DFW's position as a global logistics powerhouse.





# DFW Airport

## The Gateway to Global Commerce

As one of the largest and busiest airports in the world, Dallas-Fort Worth International Airport (DFW) serves as a cornerstone of the region's logistics and industrial sectors. With expansive air cargo facilities, strong airline partnerships, and a focus on specialized cargo, DFW has established itself as a global cargo leader, handling over 980,000 tons of cargo annually.

### » Extensive Air Cargo Facilities

DFW International Airport features state-of-the-art cargo terminals, covering over 2 million square feet of space dedicated to air freight operations. These facilities are equipped with advanced handling systems, including automated sorting and temperature-controlled storage, ensuring efficient and secure processing of a wide range of cargo types. The airport's infrastructure is optimized to meet the growing demands of e-commerce, with the capacity to handle everything from high-value electronics to perishable goods. DFW's ability to facilitate rapid delivery and distribution across the country makes it a critical hub for both domestic and international trade.

### » Strong Airline Partnerships

DFW maintains robust partnerships with major cargo carriers such as FedEx, UPS, and American Airlines Cargo, offering access to a wide range of domestic and international destinations. The airport's strategic location and extensive airline network allow for quick and efficient movement of goods to and from key markets across North America, Europe, Asia, and beyond. These partnerships ensure seamless global connectivity, making DFW a preferred choice for shippers worldwide. Additionally, the airport supports specialized cargo services, including live animals, pharmaceuticals, and hazardous materials, catering to industries with unique logistical needs.

### » Impact on the Industrial Sector

DFW's role as a cargo powerhouse has a significant ripple effect on the surrounding industrial sector. The airport's operations generate substantial demand for support services such as freight forwarding, customs brokerage, warehousing, and ground transportation. This ecosystem of services stimulates job creation, business development, and economic growth in the region. The presence of DFW has attracted numerous industrial companies, contributing to the development of large-scale logistics parks and distribution centers in the surrounding area. The airport's economic impact extends beyond logistics, influencing sectors such as manufacturing, retail, and technology, making DFW a vital component of the region's industrial landscape.

### » Focus on Specialized Cargo

DFW Airport has invested heavily in infrastructure and expertise to handle specialized cargo, including temperature-sensitive products, live animals, and hazardous materials. The airport features facilities such as a 37,000-square-foot cold chain facility for pharmaceuticals and perishables, ensuring that goods requiring strict temperature control are handled with care. DFW's specialized cargo capabilities position it as a leader in the handling of high-value and sensitive goods, meeting the evolving needs of global supply chains and enhancing the airport's reputation as a premier logistics hub.

# Love Field

## A Strategic Regional Logistics Node

While Dallas Love Field Airport is primarily known for its passenger operations, it also plays a crucial role in the regional logistics network. Located just a few miles from downtown Dallas, Love Field serves as a critical node for regional cargo and express deliveries, handling a significant volume of high-priority shipments.

### » **Regional Connectivity**

Love Field's proximity to major business districts and industrial centers enhances its importance in the logistics and industrial sectors. The airport's focus on both passenger and freight operations allows for efficient regional distribution, particularly for time-sensitive deliveries. This connectivity is vital for businesses that require quick access to urban centers, making Love Field a key component of the region's logistics infrastructure.

### » **Operational Flexibility**

Although Love Field handles a smaller volume of cargo compared to DFW International, its ability to support efficient regional distribution contributes to the overall operational flexibility of the Dallas-Fort Worth area. The airport's role in handling express deliveries, particularly for e-commerce and last-mile logistics, is increasingly important as consumer expectations for rapid delivery continue to rise.



# The End of the Wright Amendment

## Shifting Dynamics Between DFW International and Love Field

The expiration of the Wright Amendment in 2014 marked a significant turning point in the dynamics between DFW International Airport and Dallas Love Field. Originally enacted in 1979, the Wright Amendment restricted long-haul flights from Love Field, effectively channeling most of the region's long-distance air traffic through DFW International. With these restrictions lifted, Love Field was able to expand its reach, introducing new routes and increasing passenger and cargo traffic.

### Impact on Cargo Operations

The end of the Wright Amendment has had notable implications for cargo operations at both airports, reshaping the regional air logistics landscape.

#### » Increased Cargo Traffic at Love Field

The lifting of flight restrictions allowed Love Field to broaden its services and attract more cargo carriers, particularly for express and regional deliveries. The airport's proximity to downtown Dallas and key business districts made it an attractive option for time-sensitive shipments, such as e-commerce and just-in-time deliveries. This shift has diversified Love Field's role in the region's logistics network, contributing to its operational flexibility and enhancing its importance as a regional logistics hub.

#### » DFW International's Continued Dominance

Despite the changes at Love Field, DFW International Airport has maintained its dominance in the region's cargo sector. The airport's extensive infrastructure, global connectivity, and capacity for handling large volumes of cargo continue to make it the primary hub

for international and long-haul freight operations. The increase in competition from Love Field has encouraged DFW International to further invest in its cargo facilities and services, ensuring it remains a competitive player on the global stage.

#### » Complementary Roles

Rather than significantly shifting cargo away from DFW International, the end of the Wright Amendment has led to a more complementary relationship between the two airports. Love Field's focus on regional and express deliveries complements DFW's strength in international and long-haul cargo, creating a more robust and resilient logistics ecosystem within the DFW metroplex. This complementary dynamic has allowed both airports to thrive, meeting the diverse needs of shippers and carriers across the region.

### A Balanced and Dynamic Air Cargo Landscape

The expiration of the Wright Amendment has transformed the relationship between DFW International Airport and Love Field, fostering a more dynamic and balanced air cargo landscape in the Dallas-Fort Worth region. Love Field's expanded role in regional cargo operations, coupled with DFW International's continued leadership in global freight, has strengthened the region's position as a premier logistics hub.

As both airports continue to evolve, their complementary strengths will play a crucial role in supporting the region's economic growth and meeting the demands of an increasingly complex and interconnected global marketplace.



# DFW International Airport

## Future Expansion and Capacity

In addition to its existing infrastructure, DFW International Airport is on the cusp of a significant expansion with the construction of a new terminal and substantial upgrades to existing facilities. These developments are part of the airport's long-term strategy to enhance capacity, operational efficiency, and global connectivity, ensuring it remains one of the world's leading airports.

### **Terminal F: Expanding Passenger and Cargo Capacity**

#### » **Project Overview**

DFW Airport officials are moving forward with plans to build Terminal F, the airport's sixth terminal, which is expected to be operational by 2026. This new terminal will feature 15 gates and a new SkyLink station to seamlessly connect it to the rest of the airport. Unlike the crescent-shaped design of the other terminals, Terminal F will be a rectangular structure with gates on two sides, located on the southwest side of the airport adjacent to the existing Express South parking lot.

#### » **Capacity Increase**

The addition of Terminal F is a crucial part of DFW's strategy to manage the growing demand for air travel, particularly as the airport aims to handle 100 million passengers annually within the next five to seven years. The expansion will significantly boost the airport's ability to accommodate more flights, enhancing both passenger and cargo operations. This expansion is essential to support the expected surge in both domestic and international travel.

#### » **Contract and Construction**

The airport's operations committee has recently approved a contract with Innovation Next+ to handle the design and construction of Terminal F. Construction is slated to begin in late 2024, reflecting the urgency to scale up infrastructure to meet rising demand.

### **Terminal A, C, and Other Airport Modernizations**

#### » **Additional Upgrades**

In tandem with the construction of Terminal F, DFW Airport and American Airlines are investing \$3.2 billion in further improvements. These include extensive renovations and expansions at Terminals A and C, which will add 24 new gates across the airport, enhancing its overall capacity and preparing both the airline and the airport for sustained long-term growth. The expansion of Terminal C, which is being reimagined in phases, is expected to be completed by 2028.

#### » **Infrastructure Enhancements**

The broader modernization efforts will also focus on improving roadways and terminal access, making it easier and more efficient for passengers and cargo to move through the airport. These investments are critical as DFW continues to experience record-breaking passenger volumes, with over 80 million travelers in 2023 alone—a number that is expected to grow significantly in the coming years.

### **Runway 17R/35 Rehabilitation: Enhancing Operational Efficiency**

#### » **Runway Upgrades**

In addition to terminal expansions, DFW Airport recently reopened its largest runway, 17R/35, after a nine-month closure for renovations. The runway, which is 200 feet wide and covers an area equivalent to 570 NBA basketball courts, was upgraded as part of a broader \$9 billion capital improvement program. The project included the installation of 2,680,000 square >

feet of new runway surface, a high-density asphalt overlay, improved drainage, and modernized electrical infrastructure.growth. The expansion of Terminal C, which is being reimagined in phases, is expected to be completed by 2028.

» **Innovative Construction Approach**

The renovation of Runway 17R/35 is notable for its phased construction approach, allowing a partial reopening ahead of the summer travel rush while final work continues. This method minimized operational disruptions, ensuring that one of the airport’s busiest departure runways remained functional during peak travel periods. The project also included the replacement of 2,725 runway lights with energy-efficient LED lights and the construction of a new lighting vault to power the east airfield, replacing a 50-year-old system.

» **Funding and Support**

Earlier this year, DFW Airport received a \$45 million Airport Infrastructure Grant from the Federal Aviation Administration under the Bipartisan Infrastructure Law. This funding was instrumental in supporting the runway rehabilitation project, underscoring the airport’s commitment to maintaining world-class infrastructure.

## **Economic Impact and Regional Growth**

» **Economic Contributions**

DFW Airport is a major economic engine for the region, contributing \$24 billion in visitor spending annually and supporting over 600,000 direct and indirect jobs. The planned expansions, including Terminal F and runway enhancements, will further amplify the airport’s economic impact, creating thousands of jobs during construction and in ongoing operations. The upgrades will also attract more businesses to the area, particularly in the logistics, transportation, and industrial sectors, reinforcing the DFW metroplex’s status as a global logistics hub.

## **Future Outlook**

» **Global Gateway**

With these expansions, DFW International Airport is positioning itself to meet the future demands of global trade and travel. The new terminal and runway, along with the upgrades to existing facilities, will ensure that DFW remains competitive on the world stage, capable of accommodating the growing volume of both passengers and cargo. As the airport continues to grow, it will play an increasingly vital role in supporting the region’s industrial and logistics sectors, driving economic development, and connecting North Texas to the global economy.



# Alliance Airport

## A Key Logistics Hub

Located in the AllianceTexas development in Fort Worth, Alliance Airport is the first purely industrial airport in the U.S., designed to handle large volumes of cargo, making it a critical node in the region's logistics network.

### » **Strategic Location in AllianceTexas**

Alliance Airport's location within the 27,000-acre AllianceTexas development provides a strategic advantage. The development hosts over 550 companies, including major players like Amazon, FedEx, and Walmart, making the airport central to a robust logistics ecosystem. AllianceTexas is also home to over 53 million square feet of developed industrial space, which complements the airport's operations and enhances the integration of air, rail, and road transport.

### » **Advanced Cargo Capabilities**

Alliance Airport is equipped with two runways, both over 9,600 feet long, capable of handling the largest cargo aircraft. The airport also boasts state-of-the-art cargo handling facilities, including over 260,000 square feet of air cargo terminal space. These facilities support a wide range of logistics operations, from express shipping to specialized cargo handling, and contribute to the airport's reputation for reliability and efficiency.

### » **Recent Growth in Cargo Volumes**

Alliance Airport has experienced significant growth in cargo volumes, with an average annual cargo tonnage increase of 10% over the past five years. In 2023, the airport handled

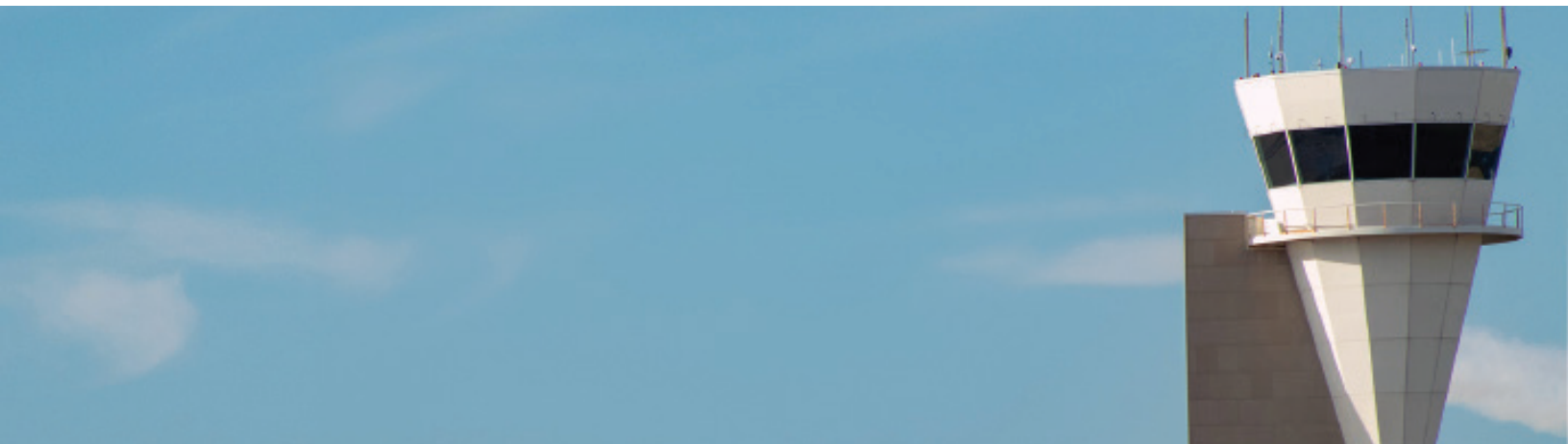
over 420,000 tons of cargo, driven largely by the rise of e-commerce and the demand for rapid delivery services. The airport's role in the supply chain for major retailers and logistics companies, including Amazon Air and UPS, has solidified its position as a key logistics hub.

### » **Economic Impact and Job Creation**

Alliance Airport is a major economic engine for the region, contributing an estimated \$8.4 billion in economic impact annually. The airport supports over 65,000 direct and indirect jobs, ranging from logistics and transportation to advanced manufacturing. The surrounding AllianceTexas development has attracted over \$11 billion in private investment, further boosting the regional economy.

### » **Focus on Specialized Cargo**

Alliance Airport has invested in specialized infrastructure to handle high-value and sensitive cargo, such as pharmaceuticals, perishables, and live animals. The airport features temperature-controlled storage facilities and dedicated areas for live animal handling, meeting the stringent requirements of global supply chains. These capabilities position Alliance Airport as a leader in the handling of specialized and time-sensitive goods, catering to industries with unique logistical needs.





# The Combined Strength of DFW's Airports

The combined strength of DFW International Airport, Love Field, and Alliance Airport reinforces Dallas-Fort Worth's position as a global logistics powerhouse. These airports are not only critical for the movement of goods but also serve as catalysts for industrial growth, economic development, and job creation. Their collective capabilities provide a comprehensive logistics solution that meets the demands of a rapidly evolving global marketplace.

Looking ahead, the DFW region's airports are poised to continue playing a pivotal role in global logistics. DFW International Airport is investing in expanding its cargo infrastructure, including new facilities and technological upgrades to increase capacity and enhance operational efficiency. These investments are crucial as the airport seeks to maintain its competitive edge in the face of growing global trade and the continued rise of e-commerce.

Alliance Airport is also expected to see further growth, with ongoing investments in infrastructure to support the increasing demand for air cargo services. As the DFW metroplex continues to expand as a logistics hub, the region's airports will remain at the forefront of this growth, driving economic prosperity and ensuring that Dallas-Fort Worth remains a key player in global commerce.