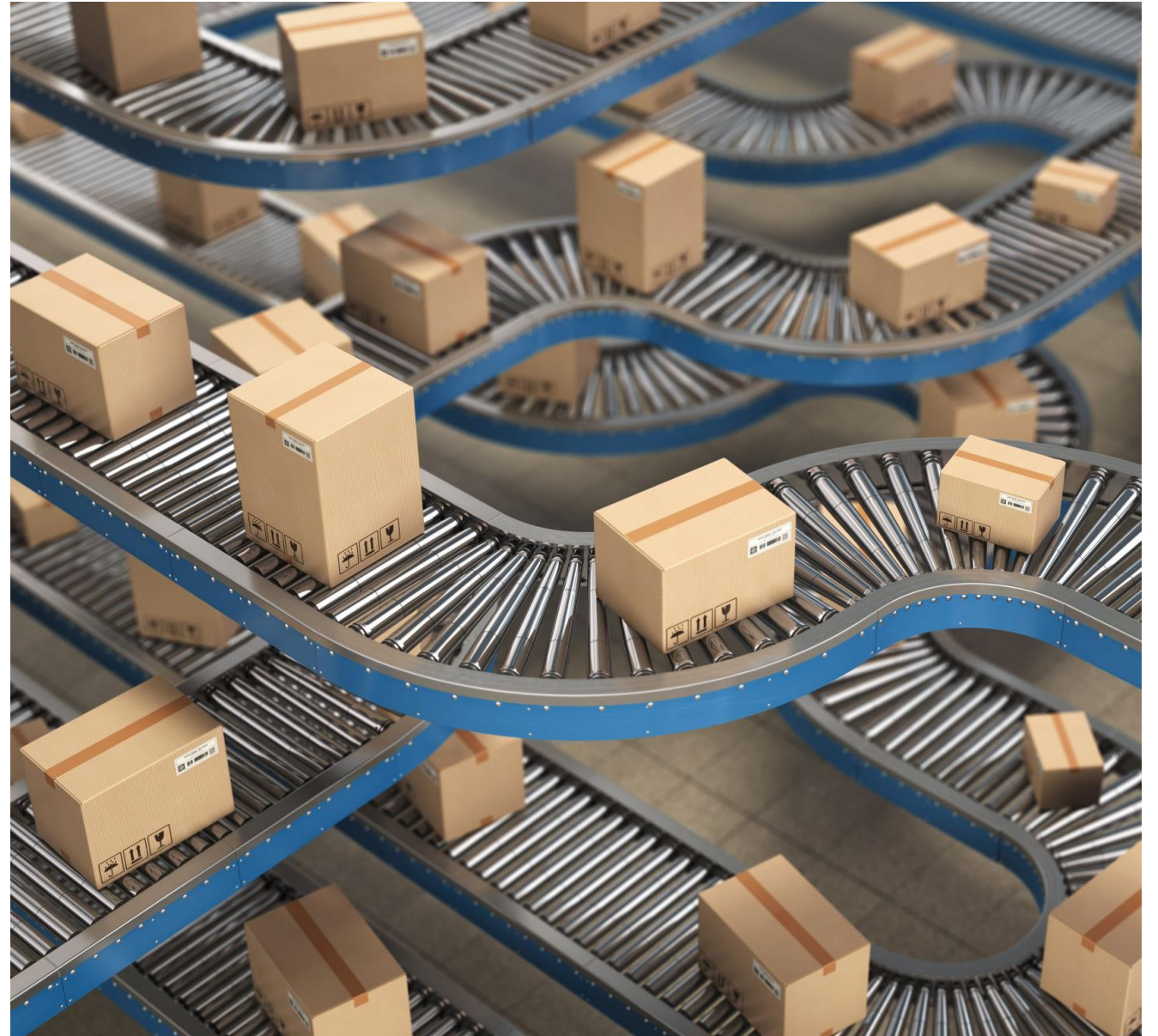


ACRP 03-80: A Guide for Air Cargo System Planning

NCTCOG Air Transportation Advisory
Committee Meeting
September 17, 2026



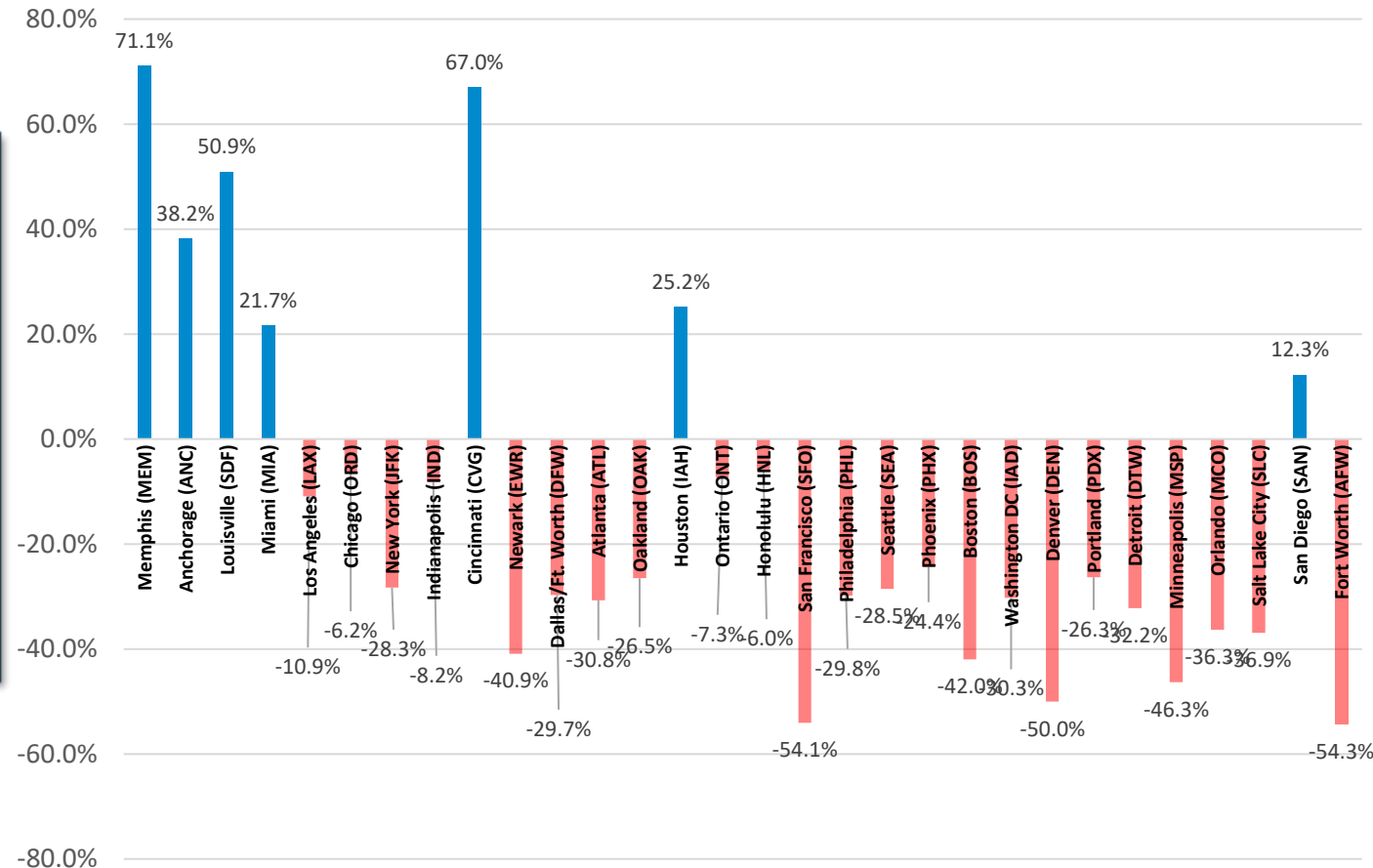
Research Team



Air Cargo at its Modern Nadir (2013-2014)

Top 30 Cargo Airports, 2000-2014

- Only 7 of top 30 airports saw net growth
- Of 23 with net decrease:
 - 19 dropped by double digits
 - 13 saw losses of 30% or more
- Demise of 3 major all-cargo carriers



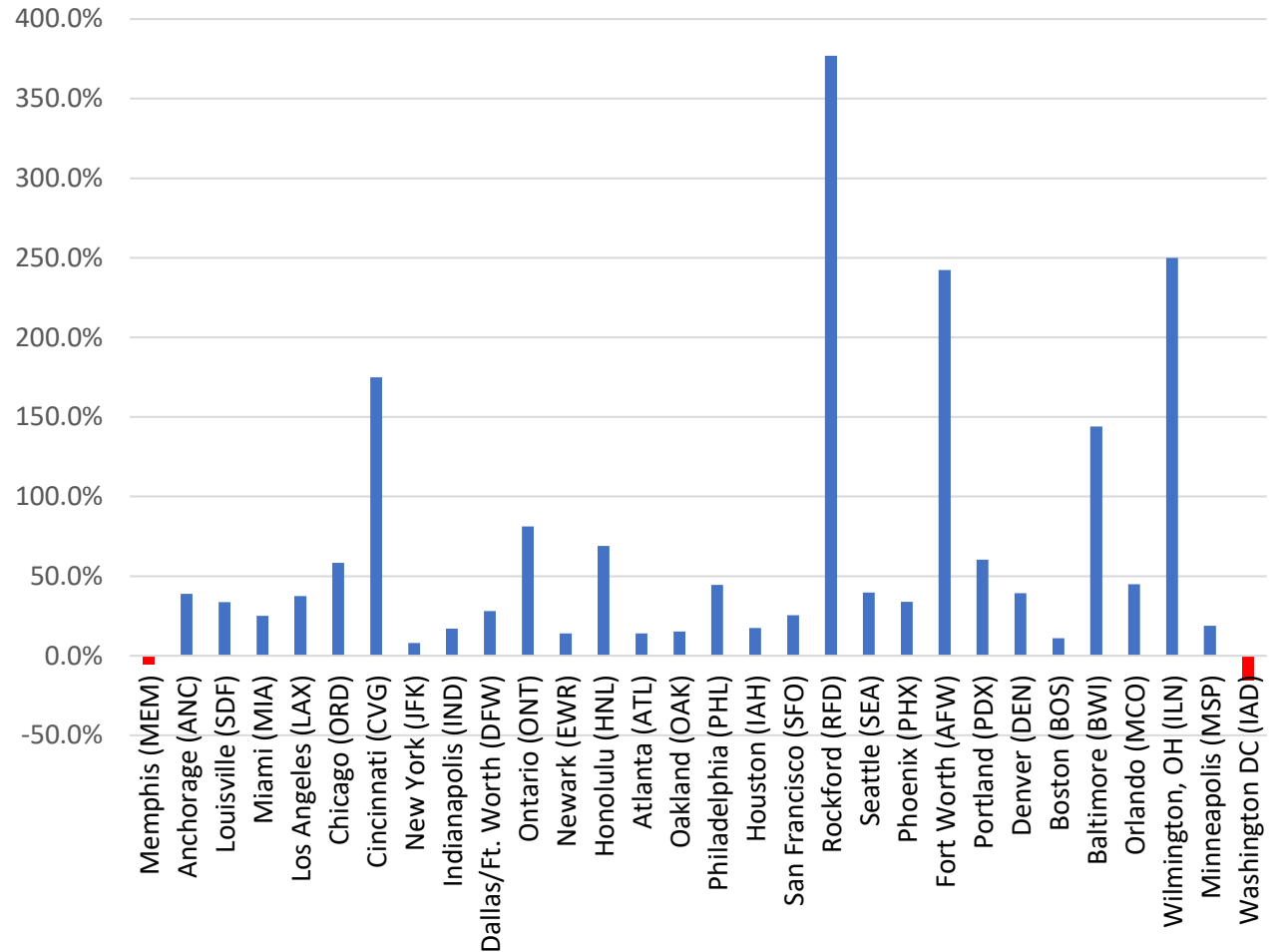
Top 30 U.S. Cargo Airports (by 2014 Tonnage), Percent Change 2000-2014

Source: ACI-NA, BTS, Webber Air Cargo

Industry Recovery: Rise of E-Commerce (2014-2024)

Top 30 Cargo Airports, 2014-2024:

- 15 airports with double-digit growth
- 6 airports with triple-digit growth
- 2 airports with losses (MEM, IAD)
- Amazon growth
 - Major hubs: CVG, RFD, AFW, BWI
 - Regional hubs: ILN, SBD, LAL, ABE



Top 30 U.S. Cargo Airports (by 2023 Tonnage), Percent Change 2014-2024

Source: ACI-NA, BTS, Webber Air Cargo

Source: ACI World |
Units: Metric Tonnes

Top U.S. Air Cargo Airports by Freight Volume (2024)

ACI rank	Airport (Code)	Function
1	Anchorage (ANC)	Transpacific Tech Stop
2	Louisville (SDF)	UPS Hub
3	Miami (MIA)	International Gateway
4	Memphis (MEM)	FedEx Hub
5	Chicago (ORD)	International Gateway
6	Los Angeles (LAX)	International Gateway
7	Cincinnati (CVG)	Amazon/DHL Hub
8	New York (JFK)	International Gateway
9	Indianapolis (IND)	FedEx Bypass Hub
10	Dallas/Ft. Worth (DFW)	Intl. Gateway/UPS Regional Hub
11	Ontario (ONT)	UPS Regional Hub
12	Newark (EWR)	Intl. Gateway/FedEx Regional Hub
13	Atlanta (ATL)	International Gateway
14	Oakland (OAK)	FedEx Regional Hub
15	Honolulu (HNL)	International Gateway
16	Houston (IAH)	International Gateway
17	San Francisco (SFO)	International Gateway
18	Rockford (RFD)	UPS/Amazon Regional Hub
19	Philadelphia (PHL)	Intl. Gateway/UPS Regional Hub
20	Seattle (SEA)	International Gateway
23	Fort Worth (AFW)	FedEx/Amazon Regional Hub

Texas Airports

ACI rank		2025	2025/2020
10	Dallas/Ft. Worth (DFW)	778,662	-1%
16	Houston (IAH)	552,588	24%
23	Fort Worth (AFW)	305,708	26%
37	Austin (AUS)	125,341	26%
38	San Antonio (SAT)	124,669	4%
54	El Paso (ELP)	75,648	-12%
71	Tulsa (TUL)	36,644	-31%
77	Oklahoma City (OKC)	32,844	7%
87	Lubbock (LBB)	23,565	-62%
93	Shreveport (SHV)	19,198	-29%
98	Harlingen (HRL)	16,318	-67%
102	Laredo (LRD)	14,325	-29%

Project Goals

ACRP 03-80 | A Guide for Air Cargo System Planning

Air cargo operations are critical for high-value, perishable, and time-sensitive goods — electronics, pharmaceuticals, and produce.

Coordination & Stakeholder Engagement

- ▶ Equip airport operators, MPOs, and state DOTs with tools to improve coordination within on-airport cargo communities
- ▶ Strengthen engagement between airports and off-airport supply chain partners (truckers, freight forwarders, 3PLs)
- ▶ Establish governance frameworks for multi-airport regional and statewide cargo planning
- ▶ Support MPOs and state DOTs in integrating air cargo into surface transportation projects

Planning, Data & Future Readiness

- ▶ Identify data-driven demand forecasting tools and key performance metrics for cargo system optimization
- ▶ Explore e-commerce capacity constraints through facility modernization, automation, and multimodal logistics integration
- ▶ Explore the applications of drone operations and AI-driven logistics, and sustainability initiatives (SAF, eGSE)
- ▶ Identify funding pathways (AIP, P3, INFRA).

Overarching Goal: Develop a comprehensive air cargo system planning guide for airport operators, MPOs, and state DOTs

Critical Issues in Air Cargo Operations

1



**OUTDATED AND
INADEQUATE CARGO
INFRASTRUCTURE**

4



**NEED FOR STANDARDIZED
PLANNING AND
COORDINATION**

2



**LIMITED TRUCK ACCESS
AND CONNECTIVITY**

5



**INSUFFICIENT
SUSTAINABILITY
MEASURES**

3



**LACK OF DATA DRIVEN
APPROACH**

6

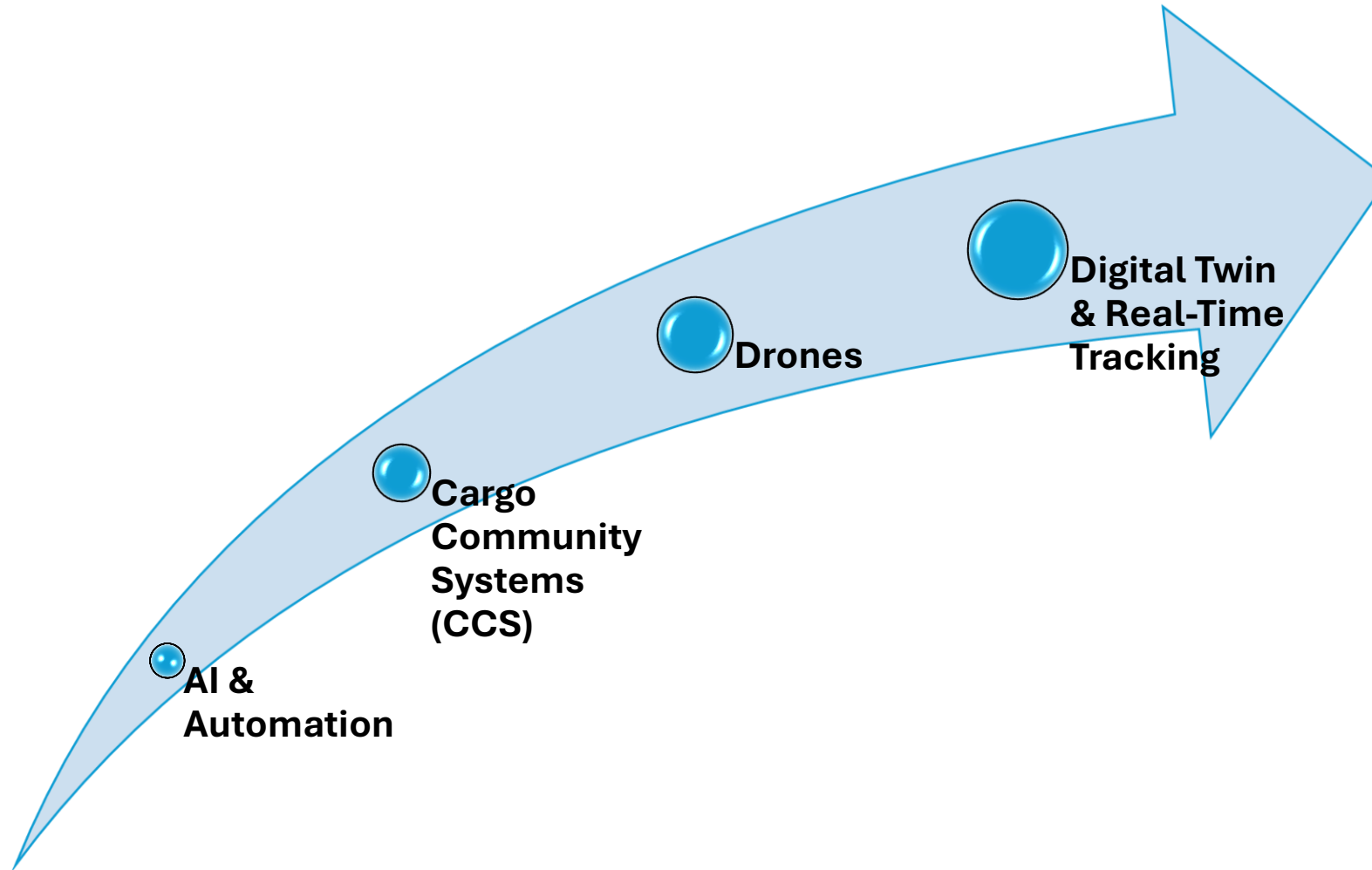


**NEED FOR TECHNOLOGY
INTEGRATION**

Air Cargo System Planning Framework



Technology Solutions



Advanced Air Mobility in Air Cargo

Future Implications of Advanced Air Mobility

How eVTOL and autonomous cargo aircraft could extend air cargo networks across first-, middle-, and last-mile segments.

AAM Use Cases for Air Cargo

- ▶ Medical supply and life-science material distribution
- ▶ Regional and intraregional distribution, including "milk runs" across a metro area
- ▶ Middle-mile shipments between cargo hubs and city stations
- ▶ Last-mile e-commerce delivery
- ▶ Remote and tertiary markets where manned cargo flights aren't viable (e.g., Alaska, SW Colorado)

Airport & Infrastructure Readiness

- ▶ On-airport vs. off-airport vertiport siting decisions
- ▶ Which airports should be AAM-ready, identified through master plans and airport layout plans
- ▶ Vertiport design compliant with FAA Engineering Brief 105A
- ▶ Electrical capacity for aircraft charging and alternative fuels such as hydrogen
- ▶ Carrier programs already underway: FedEx, UPS, DHL, Ameriflight



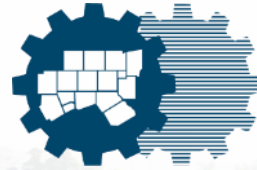
What is the greatest challenge to air cargo system growth in your region?(Select up to two responses.)



Which emerging trends are most likely to influence your region's air cargo planning over the next decade? (Select up to two responses.)



Which organizations should play the largest role in regional air cargo system planning?(Select up to two responses.)



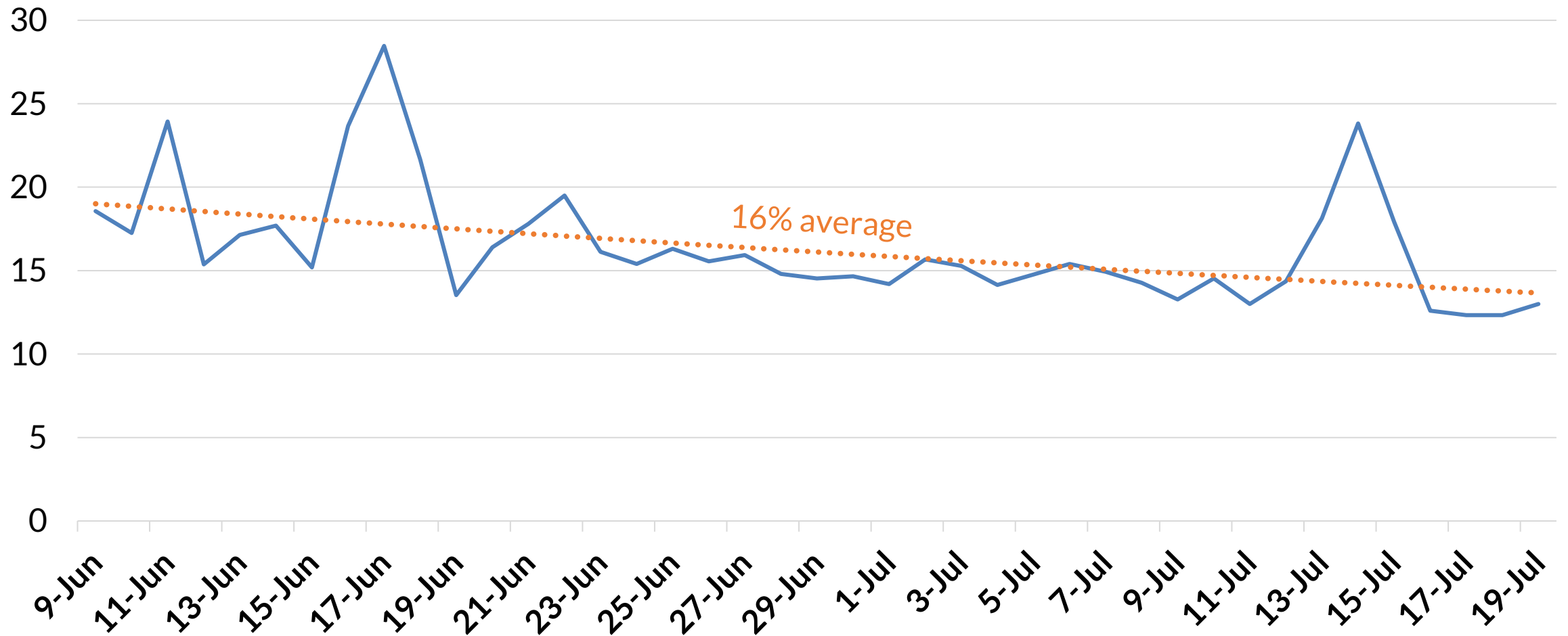
NCTCOG PRESENTATION

WORLD CUP: BY THE NUMBERS

NICOLE JOHNSON | AIR TRANSPORTATION ADVISORY COMMITTEE
09.17.2026

DAILY REGIONAL AVERAGE

46% regional participation



JUNE 17: PEAK DAY



Granbury Regional



Grand Prairie Municipal



Arlington Municipal



Bridgeport Municipal

JULY 14: PEAK DAY



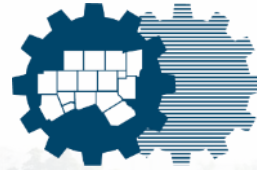
Dallas Love Field



Grand Prairie Municipal



Arlington Municipal

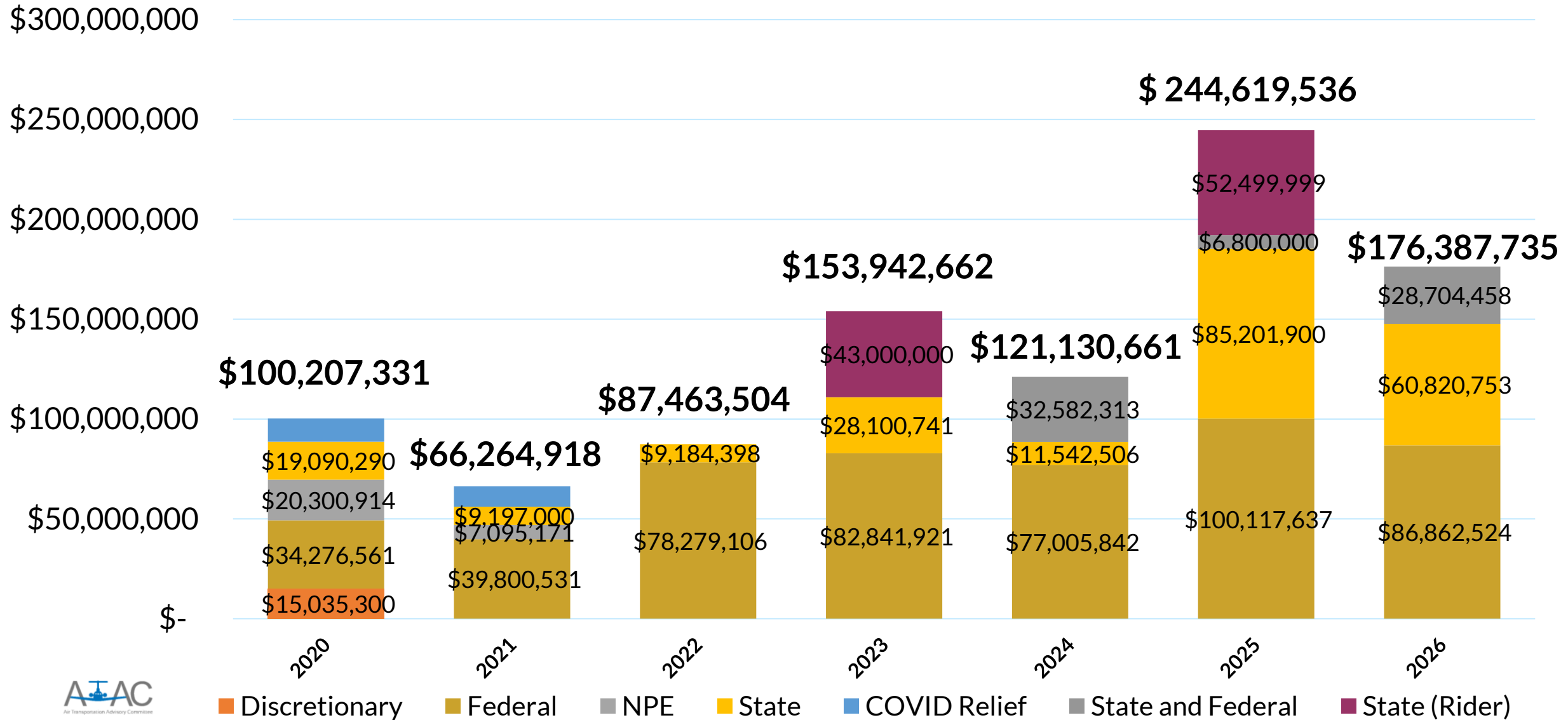


NCTCOG PRESENTATION

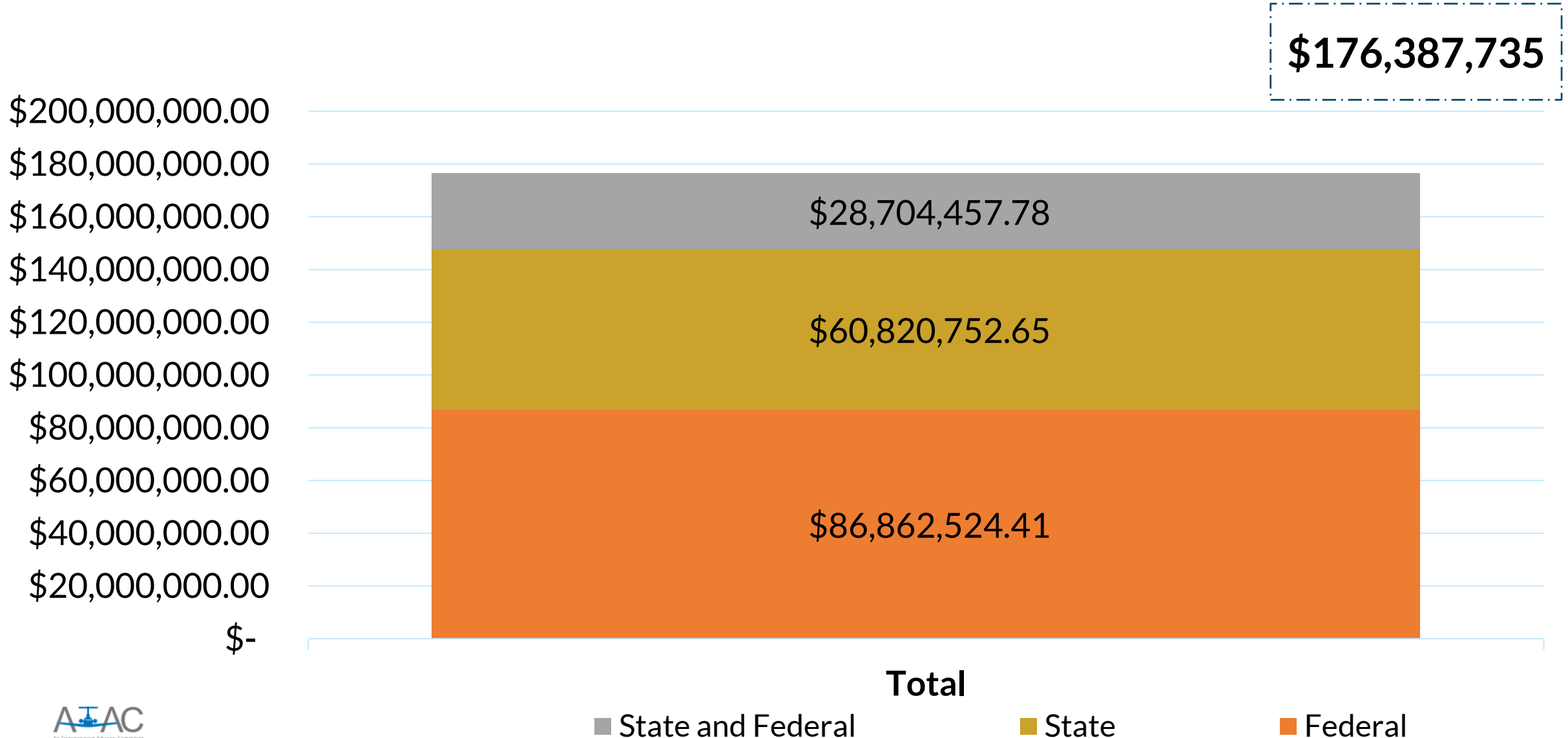
AIRPORT FUNDING DASHBOARD UPDATE

NICOLE JOHNSON | AIR TRANSPORTATION ADVISORY COMMITTEE
09.17.2026

Texas Annual Funding Comparison

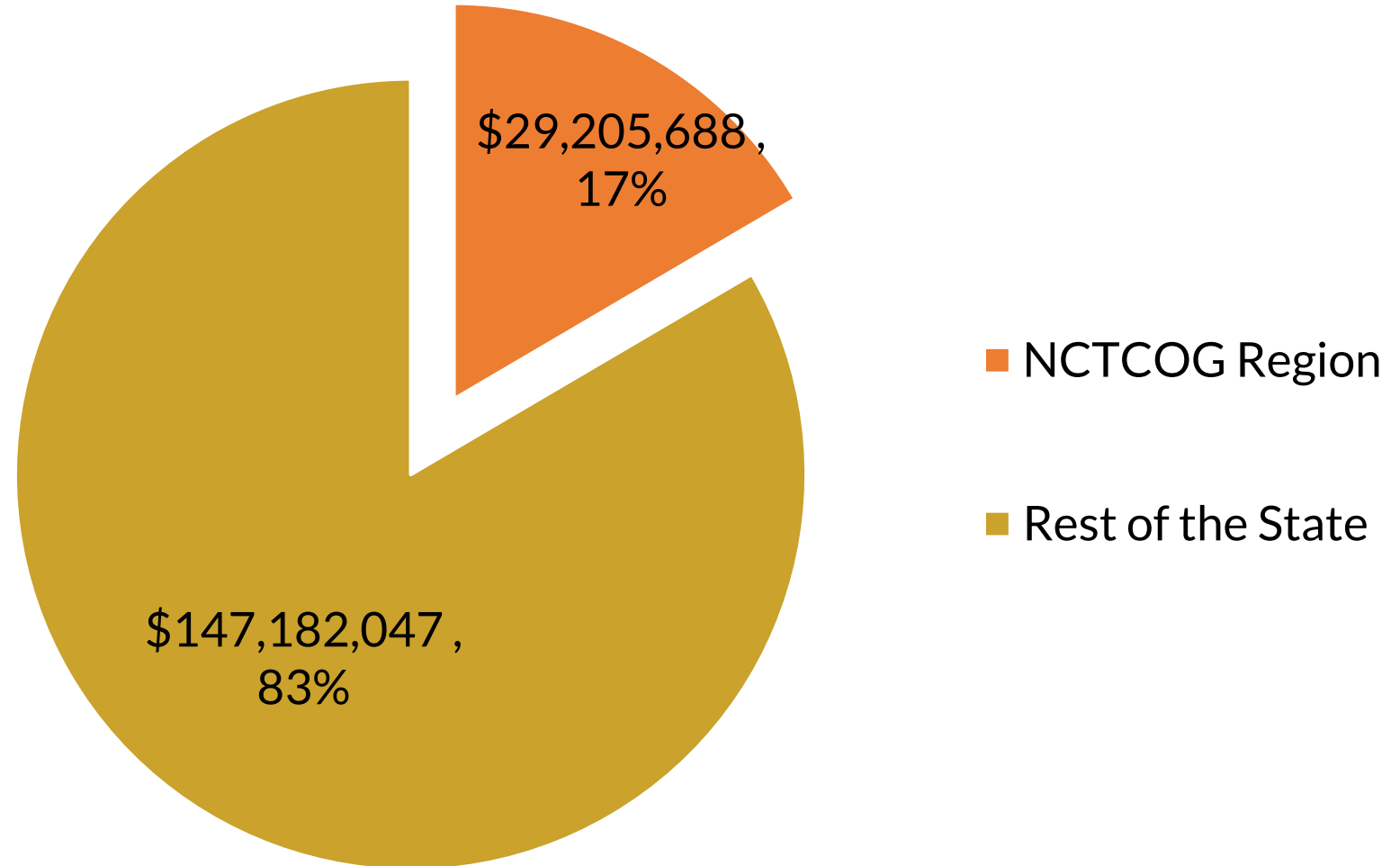


Texas Grants by Funding Source 2026

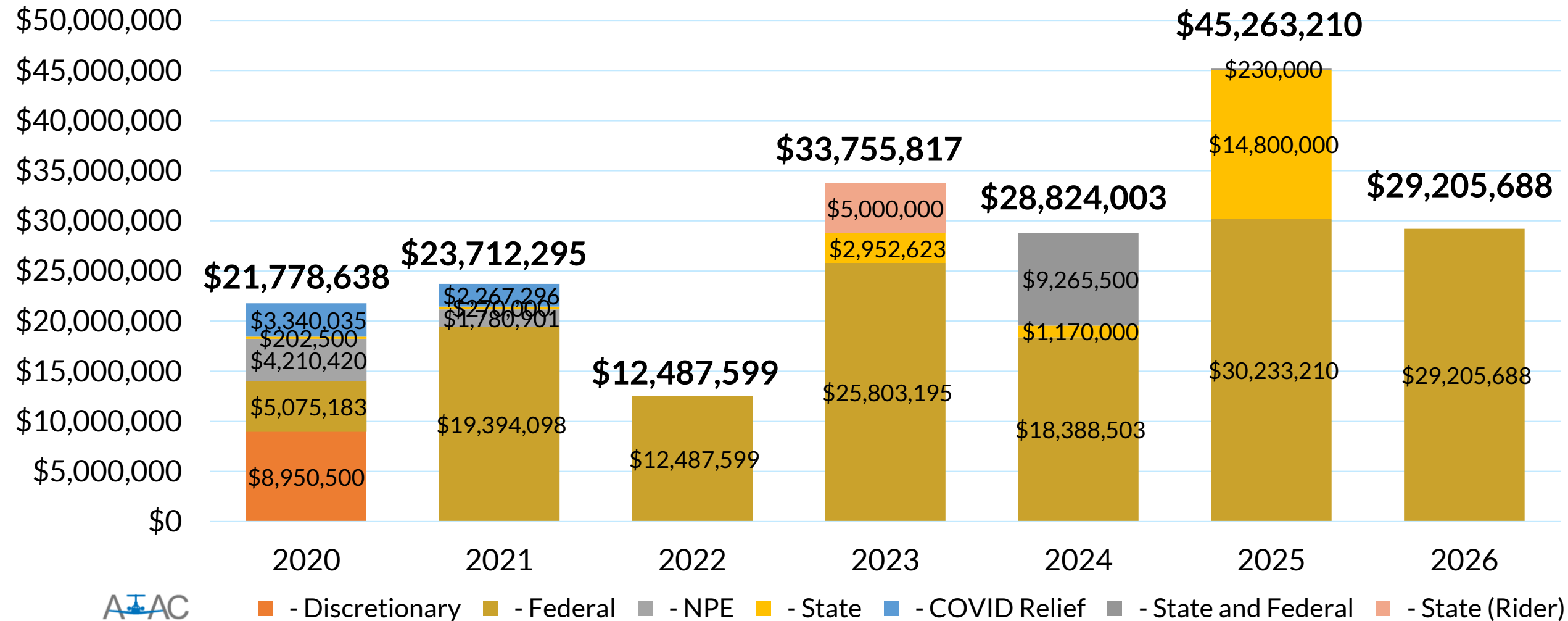


NCTCOG Region vs. Non-Region Funding 2026

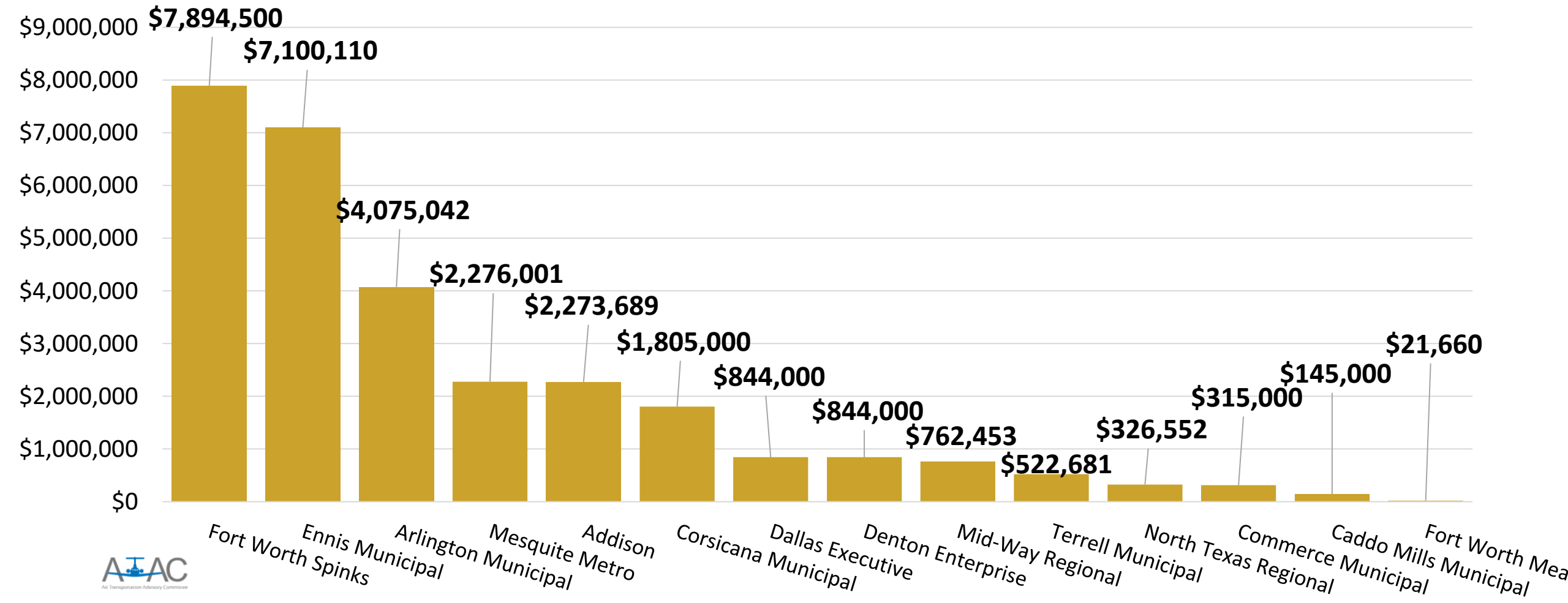
\$ 176,387,735

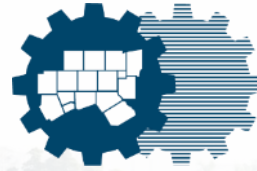


NCTCOG Region Annual Funding Comparison 2026



NCTCOG Region Airport Grant Amount 2026





NCTCOG PRESENTATION

AVIATION PROGRAM AREA UPDATE

ERNEST HUFFMAN | AIR TRANSPORTATION ADVISORY COMMITTEE
09.17.2026

NORTH TEXAS AAM AIRPORT CHARGING INFRASTRUCTURE CFP

The proposed Call for Action reflects an updated approach to previously approved AAM funding and is intended to better align regional investments with the near-term needs of North Texas airports and broader statewide AAM efforts.

- In **September 2024**, NCTCOG took initial AAM funding to the Regional Transportation Council for approval to support a potential World Cup-related demonstration effort
- The scope has since been revised to focus on the near-term needs of regional airports, particularly charging infrastructure and airport readiness for future eVTOL operations
- NCTCOG has partnered with **TxDOT** on the **Texas eIPP Pilot Program**, and this effort helps position regional airports to better align with and support that work
- North Texas airports are also pivotal to the success of the **Center for Advanced Air Mobility Technologies (CAAT)** and will play an important role in supporting future demonstrations, deployments, and long-term AAM growth in the region

FUNDING AVAILABLE - NORTH TEXAS ADVANCED AIR MOBILITY READINESS

Aviation Planning and Education

\$1,000,000 Regional Transportation Council (RTC) local funding

Funding Cap:

Each eligible airport may submit one project proposal for funding under this Call for Projects. Funding is limited to one charger per airport and is subject to the established dollar funding cap. Funding is competitive and not guaranteed.

PROPOSED ELIGIBILITY

Eligibility	Description
Charging Systems for eVTOL Aircraft	Compatible charging infrastructure for Advanced Air Mobility (AAM). Maximum Award: \$200,000
Public Use Airport	Be a public-use airport located within the 12-county NCTCOG region (Entities located in Collin, Dallas, Denton, Ellis, Hood, Hunt, Johnson, Kaufman, Parker, Rockwall, Tarrant, and Wise counties)
Airport Operator	If an airport operator, be sponsored by a public partner agency (i.e. city, county, state, etc.)
Airport Plans	Demonstrate project need consistent with the Airport Master Plan and/or Airport Layout Plan
Regional Benefit	Projects should align with NCTCOG regional transportation plans, innovation priorities, and demonstrate measurable readiness.

PROPOSED CRITERIA

Criteria	Score
Consistent with Advanced Air Mobility within the Airport Layout Plan and/or the Airport Master Plan	30%
Demonstrated understanding of AAM technologies and infrastructure requirements	40%
Demonstrated potential to attract AAM operators or private investment	5%
Strength of partnerships and implementation timeline	25%
Total Score	100%

RECOMMENDED PROJECTS

Eastern Subregion

Request: \$292,500

City / Agency	Emphasis Area	Project Title	Total Score	Requested Funds
City of Denton	eVTOL Charging System	North Texas Advanced Air Mobility Readiness Call for Projects	88	\$92,500
City of Greenville			60	\$200,000
Total				\$292,500

Western Subregion

Request: \$185,000

City / Agency	Emphasis Area	Project Title	Total Score	Requested Funds
City of Fort Worth	eVTOL Charging System	North Texas Advanced Air Mobility Readiness Call for Projects	66	\$92,500
City of Granbury			80	\$92,500
Total				\$185,000

Total Funding Request: \$477,500

SCHEDULE

Date	Action
April 24, 2026	STTC Action
June 11, 2026	RTC Action
June 12, 2026	Open Call for Ideas (45 Days)
July 25, 2026	Close Call for Ideas
August 2026	Public Meeting
August 13, 2026	STTC Action – Recommended Ideas
September 11, 2026	RTC Action – Final Ideas
September 2026	Executive Board
Fall 2026	Execute Interlocal Agreements and Begin Projects

REGIONAL TRANSPORTATION COUNCIL MEETING 9/11



OTHER UPDATES



**FAA
EIPP**



**FAA
CENTER FOR ADVANCED
AVIATION TECHNOLOGIES**



**AIRSPACE
AWARENESS
PILOT PROGRAM**

QUESTIONS?



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