



THE SOUTH SUBURBAN AIRPORT:

*Exploring the Economic
Impact of a Cargo-Only
Chicagoland Airport*

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EXECUTIVE SUMMARY

The South Suburban Airport (SSA) has been under consideration for decades. Born out of the idea that the Chicago region needed an airport in addition to O'Hare and Midway, the location of this third airport was debated for years, ultimately landing in Will County. In recent decades, land has been acquired, studies have been completed and a variety of legislative actions have occurred in support of the SSA. While the airport has yet to come to fruition, there is considerable interest in its potential impact on businesses, workers, and taxpayers.

The SSA has been actively studied since the early 1990s. There have been several legislative actions in recent years.

- The State of Illinois currently owns 89% of the planned initial footprint of the airport.
- Many master planning and environmental reports have been completed and submitted to the Federal Aviation Administration.
- \$162 million from Rebuild Illinois was awarded to construct an interchange at I-57 and Eagle Lake Road, a crucial access point to the SSA; Engineering work for this project is slated to begin in FY25.
- In 2023 and 2024, administrative changes to the Public-Private Agreements for the South Suburban Airport were adopted by the Illinois Legislature, which can help development move more quickly.
- Specifically, the Illinois Department of Transportation (IDOT) was directed to establish a prequalification process for vendors to participate in the development of the airport.

The vision of the SSA has shifted to a dedicated cargo airport, no longer supporting passenger travel.

- The SSA is ideal to serve as an airport-based logistics center, due to its prime location and the region's large market and access to railroads, intermodal facilities, interstate highways, and navigable waterways.
- The SSA would be well positioned to serve integrator/express airlines – like FedEx, UPS, DHL, or Amazon Air – offering more convenient delivery times to regional Chicago and local Will County markets.
- The SSA would also be able to serve all-cargo airlines – like Atlas Air Cargo, Evergreen, and others – supporting narrow-body charters to supply the local industry and e-commerce fulfillment warehouse base.

The SSA would complement two major air cargo airports in the Chicago region (O'Hare and Rockford) – both of which have experienced large growth in air cargo facilities over the past decade..

- Combined total air cargo landed weight at both O'Hare and Rockford grew 94% between 2010 and 2022.
- In 2022, O'Hare ranked 7th in the nation and Rockford ranked 13th in the nation for cargo-only air travel; they carried 3.9 million and 1.7 million short tons, respectively.
- Rockford's air cargo increased 273% between 2010 and 2022, partially due to Amazon locating there in 2016.
- Increased growth in air cargo nationwide is linked to companies like Amazon, FedEx, and UPS serving the e-commerce industry; and similar businesses would be the target of the SSA.

Development of the SSA would boost the economy, create jobs, and support public budgets.

- The construction of the \$162 million interchange will create 1,500 total jobs and boost economic activity by \$314 million.
- Airport construction totaling \$500 million would create about 6,300 total jobs and increase economic activity by \$1 billion.
- Assuming the airport generates \$13 million in annual operations, it would create about 80 permanent jobs and boost economic activity by \$24 million each year.

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INTRODUCTION

The South Suburban Airport (SSA) has been under consideration for decades. Born out of the idea that the Chicago region needed an airport in addition to Chicago O’Hare International Airport and Chicago Midway International Airport, the location of this third airport was debated for years, ultimately landing in Will County. The Federal Aviation Administration (FAA) issued an Environmental Impact Statement / Record of Decision (EIS/ROD) for the site approval of the airport to reside in Will County in 2002 (IDOT, 2013). Since that time, land has been acquired, additional studies have been completed, and a variety of legislative actions have occurred in pursuit of the SSA. While the airport has yet to come to fruition, there is considerable interest in its potential economic effects on workers, businesses, residents, and taxpayers. This report by the [Illinois Economic Policy Institute](#) (ILEPI) provides recent developments of the SSA, a history of past work to support the project, and an updated economic analysis.

PROJECT HISTORY AND RECENT PROGRESS

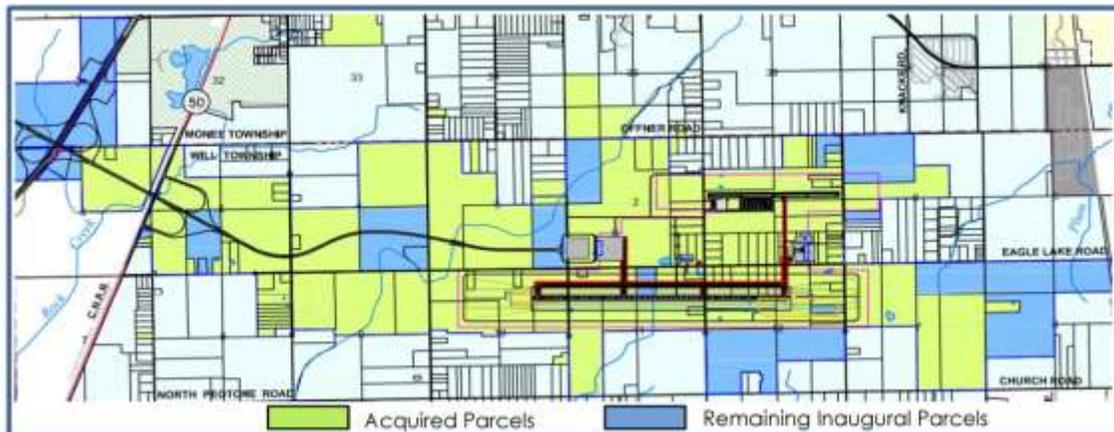
The SSA has been actively studied and pursued since the early 1990s. The current status of the project is considered to be “under review” by the state, as described in the 2023 *South Suburban Airport Annual Progress Report* submitted to the Illinois General Assembly (IDOT, 2023b). While local leaders continue to pursue the project and legislative actions have been taken, major land acquisition, planning, and environmental efforts have largely been stalled in recent years. The state will need to determine the most appropriate method for developing, financing, and operating the proposed airport (FAA, 2022).

The following section provides an overview of recent steps taken to progress the development of the airport. The table on the following page provides a timeline of major work completed on the project since the early 1990s and significant milestones related to project support and planning.

Land Acquisition

Figure 1 illustrates land acquired and needed to advance the SSA. The parcels in green represent those already acquired, which total over 4,500 acres. The parcels colored in blue are those that are still needed. The State of Illinois currently owns 89% of the inaugural footprint. The most significant acquisition was Bult Field in 2014, which is currently managed and operated under the Illinois Department of Transportation’s (IDOT’s) Division of Aeronautics. Bult Field is currently operating as a corporate / general aviation airport (IDOT, 2023b).

Figure 1: SSA Land Acquisition Status as of June 2023



Source: IDOT, 2023b

PROJECT HISTORY TIMELINE

■ Project Studies & Approval
■ Legislative Accomplishments

■ Land Acquisition
■ SSA Vision Updates

YEARS	PROGRESS	DESCRIPTION
1994 – 1998	IDOT Pre-Planning	In 1994 IDOT began Phase I Engineering Study, Environmental Assessment, an Airport Layout Plan, and a financial feasibility analysis. The EA was submitted in 1998. Between 1994 and 1998, additional studies to determine demand for the new airport and private financing options were pursued by IDOT.
2000	FAA EIS	The FAA began preparing the official Environmental Impact Statement document for site approval and acquisition of land.
2002	FAA Site Approval	The FAA granted site approval for the location of the airport in 2002.
2002 - Current	Land Acquisition	Governor Ryan announced in 2001 that IDOT would begin acquiring land at the proposed SSA location in Will County. The first parcel was purchased in 2002 and land has continued to be acquired up to and including recent years.
2004 – 2008	IDOT Master Planning Studies for FAA Approval	Between 2004 and 2008, IDOT prepared and submitted for FAA review report on projections of aeronautical activity, demand/capacity analysis and facility requirements, socio-economic impact assessment, and preferred Inaugural Airport Program (IAP).
2011-2013	Updated IDOT Master Planning Studies for FAA Approval	Additional Master Planning studies were developed as an update to the past IDOT studies from 2004-2008.
2013 – 2015	Environmental Studies Approved by the FAA	A variety of environmental reports were submitted to the FAA and FHWA, including an Access Jurisdiction Report, Archaeological, Wildlife Hazard Assessment, Wetlands, and Floodplain Modeling, which were formally approved between 2013 and 2015; while these studies support the master planning process, it does not represent FAA’s complete EIS effort.
2013	SB20 Passed	The Economic Development Act of 2013 included the creation of the Public-Private Agreements for the South Suburban Airport Act, which permits the use of a public-private partnership (P3) to develop the airport.
2014	Bult Field Land Acquisition	IDOT acquired Bult Field – a general aviation airport – for \$34 million. Covering 288 acres, this airport was a key component of developing the SSA.
2019	Rebuild Illinois Infrastructure Investment	Governor Pritzker’s Rebuild Illinois Capital Plan included \$162 million for building an interchange on I-57 at Eagle Lake Road near the SSA site. Engineering work is scheduled to begin in FY25.
2023	Updated Vision – Cargo Only Airport	Proponents of the SSA declared an updated vision for the airport to only handle cargo-planes, no longer considering passenger travel part of the plan.
2023	HB2531 Passed	HB2531 requires IDOT to establish a prequalification process for vendors to participate in the development in the airport.
2024	HB5496 Passed	HB5496 allows unsolicited bids to be used under a public-private partnership for the South Suburban Airport.

Sources: IDOT, 2011; IDOT, 2023; CMAP, 2013; Congresswoman Robin Kelley, 2019; HB2531, 2023; HB5496, 2024

Project Studies & Approval

Both master planning and environmental reports have been completed on the proposed SSA and submitted to the FAA for their approval. The majority of these studies were formally approved by the FAA and FHWA between 2011 and 2015. Certain components are awaiting FAA's review and acceptance, including the Airport Access Plan, Airport Layout Plan & Airport Plans Report, Facilities Implementation Plan, and the Financial Feasibility Report (IDOT, 2023b). It is anticipated that once a feasible funding and development strategy has been developed for the airport, additional planning and federal approval will be required.

Legislative Actions

There have been several significant legislative actions pertaining to the proposed SSA over the last five years. Most notably, \$162 million was included in Rebuild Illinois in 2019 to construct an interchange at I-57 and Eagle Lake Road, a crucial access point to the SSA from the interstate system (Congresswoman Robin Kelly, 2019). Engineering work for this project is slated to begin in FY25 with construction funding dedicated under FY26 (CMAP, 2024). Additionally, in 2023 and 2024, administrative changes to the Public-Private Agreements for the South Suburban Airport Act were adopted. In 2023, HB2531 required IDOT to establish a prequalification process for vendors to participate in the development in the airport. Furthermore, in 2024, HB5496 allowed unsolicited proposals under a public-private partnership to be used to develop the SSA.

A NEW VISION: DEDICATED CARGO AIRPORT

In recent years, the vision of the SSA has shifted to a dedicated cargo airport, no longer aiming to include passenger travel. The airport property would support business parks and multimodal and intermodal transportation services as well, creating a new freight hub in eastern Will County. The SSA's location near interstate and rail lines is ideal to service such needs.

A draft feasibility analysis was performed in 2022 by two consulting firms – WSP and Keiser Phillips Associates – to understand how the SSA would benefit from cargo-only development and to identify strengths and weaknesses. It was determined that the SSA is ideal for an airport-based logistics center and could also serve all-cargo airlines and integrator/express airlines.

- **Airport-Based Logistics Center:** defined as a network hub for consolidation/distribution of air, truck, and/or rail freight and other related logistical activities. With the SSA being a greenfield, it is an ideal location and situation in terms of developable land and IT infrastructure. The region's large market area and access to railroads, intermodal facilities, interstate highways, and navigable waterways could also support this development.
- **All-Cargo Airlines:** defined as a carrier that typically operates scheduled wide-body and/or containerized cargo aircraft from one airport to another. All-cargo carriers include Atlas Air Cargo, Kalitta, Evergreen, Cargolux, and Polar Air Cargo (TRB, 2024). The SSA could serve narrow-body charters supplying the local industrial and e-commerce fulfillment warehouse base, but it could also attract medium wide-body from O'Hare during seasonal peaks.
- **Integrator/Express Airlines:** defined as a type of logistical company that takes full custody of a package from pickup to drop-off; they own their own fleet of trucks, planes, and sorting centers. Examples include FedEx, UPS, DHL, or Amazon Air (Eldridge, 2022). This is one of the fastest-

growing sectors in the air cargo market. The SSA can offer more convenient delivery times to regional Chicago and local Will County markets, particularly providing new coverage for areas east and south of the Chicago region.

While the SSA has many of the basic components necessary to attract and maintain air cargo service, the feasibility analysis indicates that additional work will be required to ultimately achieve its development. Most notably, financial feasibility and funding options must still be determined. Additional infrastructure construction will also be required to bring the SSA up to an operational standing (WSP & KPA, 2022).

AIR CARGO IN CONTEXT

Air cargo is an important component of Illinois' freight network. It is the Chicago region's only direct gateway for international goods and has continued to grow greatly in recent years (CMAP, 2015). With growth anticipated in future years, the SSA could offer an additional option for the Chicago region.

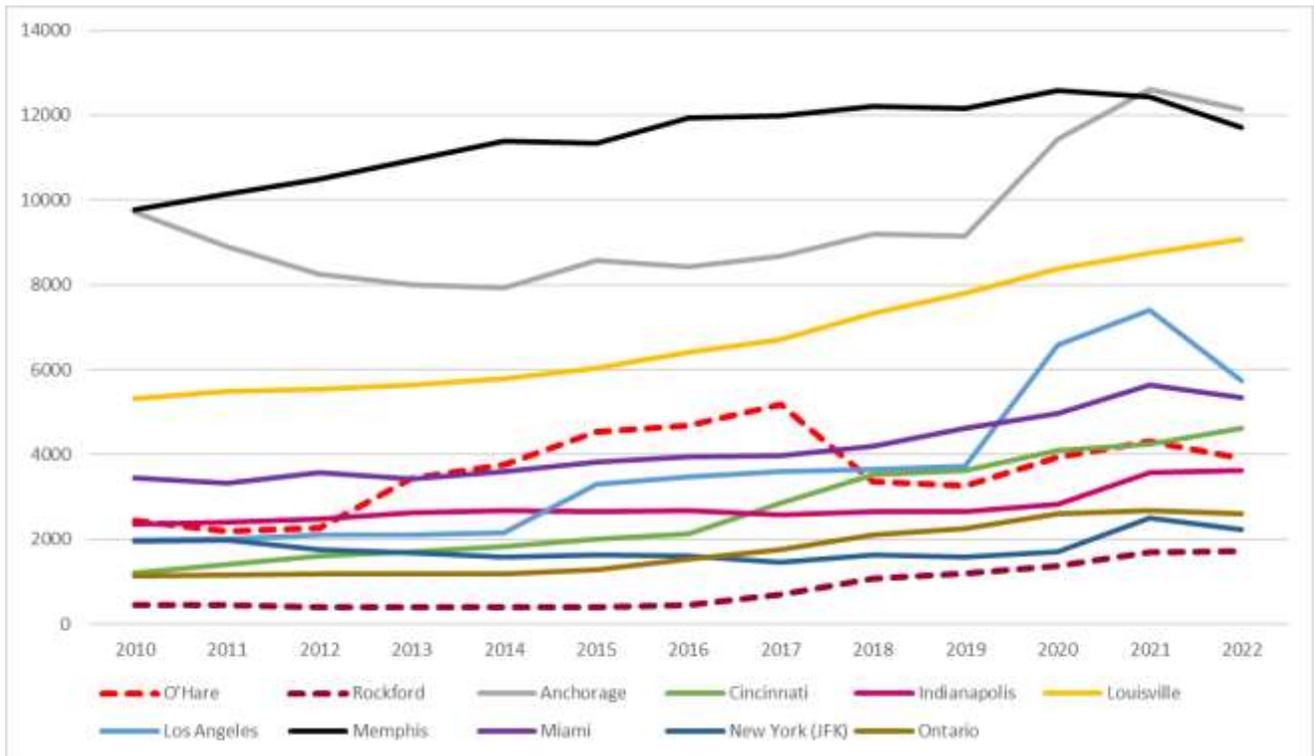
Shipping products by air is inherently more expensive than other freight modes. However, air freight can accommodate smaller products that are typically higher in value, like electronics and precision instruments. Additionally, air freight can serve products that are time-sensitive, like pharmaceuticals, flowers, and other perishables. Overall, added security, reliability, and speed are the factors that typically drive the choice to ship via air as opposed to another freight mode, particularly for high-value items (ACI-NA, 2020). To illustrate, CMAP reported that air freight's value per ton was estimated at \$80,000 in 2012, compared to \$1,300 per ton for truck and about \$500 per ton for rail (CMAP, 2015).

Currently, O'Hare International Airport and the Chicago/Rockford International Airport are the two primary freight airports within the Chicago region, with both ranking within the top 13 airports nationwide in 2022 based on weight of all-cargo operations. While Midway International Airport does handle some air cargo, it is a relatively small amount and is not included in the data. Figure 2 (next page) illustrates the total weight landed of all-cargo operations at the top 10 airports nationwide between 2010 and 2022, with Rockford included although it is outside the top 10. In general, air cargo operations have, on average, trended upward since 2010. Airports in Memphis, Anchorage, and Louisville have consistently remained in the top three spots by landed weight.

O'Hare has fluctuated in rankings between fourth and seventh in the same timeframe. O'Hare handled 3.9 million short tons of cargo in 2022, up from 2.5 million in 2010. Rockford ranked 13th in 2022, a significant jump from ranking 28th in 2014. And as shown in Figure 2, Rockford has experienced consistent growth since 2010, increasing from handling only 459,000 short tons in 2010 to 1.7 million short tons in 2022, an increase of 273%. It is notable that air cargo handled in Rockford grew significantly after 2016, which is when Amazon began operations.

Compared to other top cargo airports, both Chicago and Rockford have fared well, seeing considerable growth in the past decade and outpacing most others ranking in the top 10. Figure 3 (next page) highlights the landed weight of air cargo and related percent change between 2010 and 2022 for these 11 airports. Rockford's air cargo increased 273% between 2010 and 2022, second only to Cincinnati's 280% growth. O'Hare's saw a 60% increase, slightly more than the 50% shown by Indianapolis and Miami. In general, O'Hare's growth is consistent with other top-cargo airports, while Rockford's is well above average (BTS, 2024; FAA, 2024). It is also worth noting that O'Hare is the top ranked airport in North America by cargo value, processing \$300 billion worth of freight annually (CDA, 2023).

Figure 2: Landed Weight of All-Cargo Operations for Top 10 Airports (plus Rockford) Nationwide, In Thousands of Short Tons for 2010-2021



Source: BTS, 2024; FAA, 2024

Figure 3: Landed Weight of All-Cargo Operations

Airport	Landed Weight in Thousands of Short Tons (2022)	Rank by Landed Weight (2022)	% Change 2010-2022
Anchorage	12,133	1	25%
Memphis	11,701	2	20%
Louisville	9,084	3	71%
Los Angeles	5,731	4	190%
Miami	5,334	5	54%
Cincinnati	4,618	6	280%
O'Hare	3,920	7	60%
Indianapolis	3,615	8	53%
Ontario	2,602	9	132%
New York (JFK)	2,228	10	14%
Rockford	1,712	13	273%

Source: FAA, 2024

It is important to note that seven of the 11 airports analyzed experienced their highest air cargo numbers in 2021, with the total landed weight then decreasing in 2022. This is likely due to pandemic-related increases in e-commerce. Only Rockford, Cincinnati, Indianapolis, and Louisville saw minimal growth between 2021 and 2022. Together, air cargo traffic at both O'Hare and Rockford decreased slightly between 2021 and 2022, but it grew 94% between 2010 and 2022 – a testament to the strong air cargo market in the Chicago region (BTS, 2024; FAA, 2024).

Increased air cargo traffic at Rockford and Cincinnati has been attributed largely to Amazon. After Amazon located in Rockford in 2016 and Cincinnati in 2017, air cargo significantly increased in the following years, as illustrated in Figure 2, albeit Cincinnati's growth has been more substantial. Both airports have invested heavily in new construction for their cargo facilities in recent years, with many of these facilities supporting Amazon directly. Despite Amazon's significant presence, increased air cargo traffic can also be attributed to DHL, FedEx, and UPS at these two airports (Schneider, 2021; Marsh, 2023).

Similar businesses would be the target of the SSA. With Chicago air cargo expected to continue growing – in addition to warehouses and distribution centers growing within Will County – the SSA may be well positioned to take advantage. However, while both Rockford and Cincinnati benefitted from the expansion of air cargo, they grew from existing airport facilities. The SSA will require significant investments in infrastructure to attract these businesses and begin operations.

THE ECONOMIC AND FISCAL IMPACTS OF THE SSA

The following economic impact analysis considers both the short-term economic impact from the construction of the SSA and related roadway infrastructure as well as the potential long-term impacts of operating a dedicated cargo airport.

Two recent reports by Governors State University and R.A. Wiedemann & Associates, Inc. performed similar economic impact analyses (Governors State University, 2022; R.A. Wiedemann & Associates, 2021). However, these were completed prior to the SSA's new vision as a dedicated cargo airport. This analysis uses some of the same assumptions regarding construction costs and operating revenue, but the economic impact analysis is updated to only reflect cargo operations, eliminating any consideration of passenger travel (Governors State University, 2022; R.A. Wiedemann & Associates, 2021).

This section utilizes IMPLAN to assess the net impact of the cost and benefits of economic activity and employment. IMPLAN is an input-output software that estimates the multiplier, or ripple effect, of changes in industry spending or household expenditures based on U.S. Census Bureau data. In essence, IMPLAN follows each dollar flowing through the economy and uses recent trends to estimate the impact of future policy changes or events.

IMPLAN identifies the overall economic impact of investments by direct, indirect, and induced effects, which differentiate between the source of the added value. These terms are defined below, using the airport's construction phase as an example.

- Direct impacts represent the inherent additional expenditures associated with the construction process, including on blue-collar construction workers as well as white-collar services such as engineers and architects.

- Indirect impacts are the result of other businesses in the supply chain delivering goods and services to those performing the construction work, such as companies supplying materials, fuel and energy, insurance services, and even artwork at the new airport.
- Induced impacts are the product of both project employees and indirect employees purchasing goods and services, such as at local grocery stores, restaurants, and car dealerships. This is also known as the induced economic effect or consumer demand impact.

Impacts of Capital Investments - \$162 Million Interchange Project

The \$162 million interchange will create more than 1,500 total jobs, including over 900 direct jobs in the construction industry. Assuming the interchange takes three years to complete, it will produce approximately 500 jobs per year and 300 direct construction industry jobs. While blue-collar construction workers account for the majority of the jobs in the construction industry, architects, engineers, and white-collar workers are also included in the direct impact.

The interchange project will increase economic activity in the region by \$314 million, an economic multiplier of \$1.94 for every dollar invested. Assuming the project takes three years to complete, it will come out to \$100 million per year. It will also boost state tax revenues by \$8 million and local tax revenues by \$5 million—or \$13 million total—during construction.

Figure 4: Estimated Economic Impact of \$162 Million Interchange Project

\$162 Million Interchange Project	Employment (Jobs)	Output (Business Sales)	State Taxes	Local Taxes
Direct Impact	926	\$162,000,000	\$2,796,886	\$464,211
Indirect Impact	205	\$70,409,937	\$2,303,488	\$2,092,961
Induced Impact	416	\$81,210,218	\$2,996,148	\$2,623,173
Total Impact	1,547	\$313,620,154	\$8,096,522	\$5,180,345

Source: Authors' IMPLAN analysis using data from Governors State University, 2022 and R.A. Widemann & Associates, Inc., 2021

Impacts of Capital Investments - \$500 Million Airport Construction

Our analysis assumes that airport construction will total \$500 million, which was the value used in both past economic impact analyses (Governors State University, 2022; R.A. Widemann & Associates, 2021). While this estimate may now be too low due to construction cost inflation, it provides a conservative estimate based on the reduced scope of the facility to a cargo-only airport and can be modified in the future if further airport construction plans and cost estimates are published.

The \$500 million airport construction project would create about 6,300 total jobs, including over 4,000 direct jobs in the construction industry. Assuming the airport takes four years to complete, it would create about 1,600 jobs per year, including 1,000 in the construction industry. The airport project would enhance economic activity in the region by \$1 billion, an economic multiplier of \$2.01 for every dollar invested, or \$250 million per year. It will also boost state tax revenues by \$27 million and local tax revenues by \$18 million – or \$45 million total – during construction. Tax impacts are cumulative over the life of the project.

Figure 5: Estimated Economic Impact of \$500 Million Airport Construction

\$500 Million Airport Construction	Employment (Jobs)	Output (Business Sales)	State Taxes	Local Taxes
Direct Impact	4,064	\$500,000,000	\$9,444,625	\$3,227,243
Indirect Impact	628	\$184,737,763	\$5,487,359	\$4,510,715
Induced Impact	1,629	\$317,960,035	\$11,730,097	\$10,269,473
Total Impact	6,321	\$1,002,697,798	\$26,662,081	\$18,007,431

Source: Authors’ IMPLAN analysis using data from Governors State University, 2022 and R.A. Widemann & Associates, Inc., 2021

Impacts of Airport Operations

Assuming similar levels of air cargo as presented in Governors State University’s 2022 report, the SSA’s air cargo weight is estimated to total 1.526 million tons in 2030. This amount is slightly below the level the Rockford airport achieved for cargo-only traffic in 2022. Using this assumption, in addition to comparing to other similarly sized airports, it is estimated that the airport’s annual revenue would total \$13 million.

The \$13 million in airport operations from cargo freight would create about 80 total jobs annually, including 25 directly at the airport, according to IMPLAN. That’s approximately one employee per \$520,000 in revenue – which is comparable to other similarly sized airports (RFD, 2021; Governors State University, 2022; R.A. Widemann & Associates, 2021). The airport project would increase economic activity in the region by \$24 million every year, an economic multiplier of \$1.88 per revenue dollar. It would also boost annual state tax revenues by \$1 million and local tax revenues by \$1 million each year.

Figure 6: Estimated Economic Impact of \$13 Million Annual Revenue for Airport Operations

\$13 Million in Airport Revenue	Employment (Jobs)	Output (Business Sales)	State Taxes	Local Taxes
Direct Impact	25	\$13,000,000	\$627,219	\$732,854
Indirect Impact	27	\$6,249,966	\$198,955	\$180,767
Induced Impact	26	\$5,172,372	\$190,979	\$167,301
Total Impact	78	\$24,422,338	\$1,017,154	\$1,080,922

Source: Authors’ IMPLAN analysis using data from Governors State University, 2022 and R.A. Widemann & Associates, Inc., 2021

CONCLUSION

The South Suburban Airport is looking to a new vision as a cargo-dedicated airport. The growth of the e-commerce and air freight industries present an opportunity for the potential SSA. Situated in an ideal location in Will County along the I-57 logistics corridor, just south of I-80, and only 45 miles east of the largest inland port in the United States, the SSA is primed to contribute to the region’s e-commerce industry and the state’s economy on the whole.

The construction of the airport and nearby roadway improvements would result in over 2,000 jobs annually during the multi-year construction phase and would boost economic activity in the area by \$1.3 billion. The operations of a successful cargo-only airport would produce approximately 80 full-time jobs annually, increase annual economic activity by an additional \$24 million in the region, and add \$2 million in state and local tax revenues every year.

While additional work is needed, recent years have seen several legislative changes to move the proposed airport forward. IDOT was directed to release a prequalification process for qualified contractors to solicit ideas and garner interest from private parties interested in developing the airport. These recent advancements can help the South Suburban Airport finally break ground, delivering positive economic value to Chicago area residents, businesses, workers, and taxpayers.

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