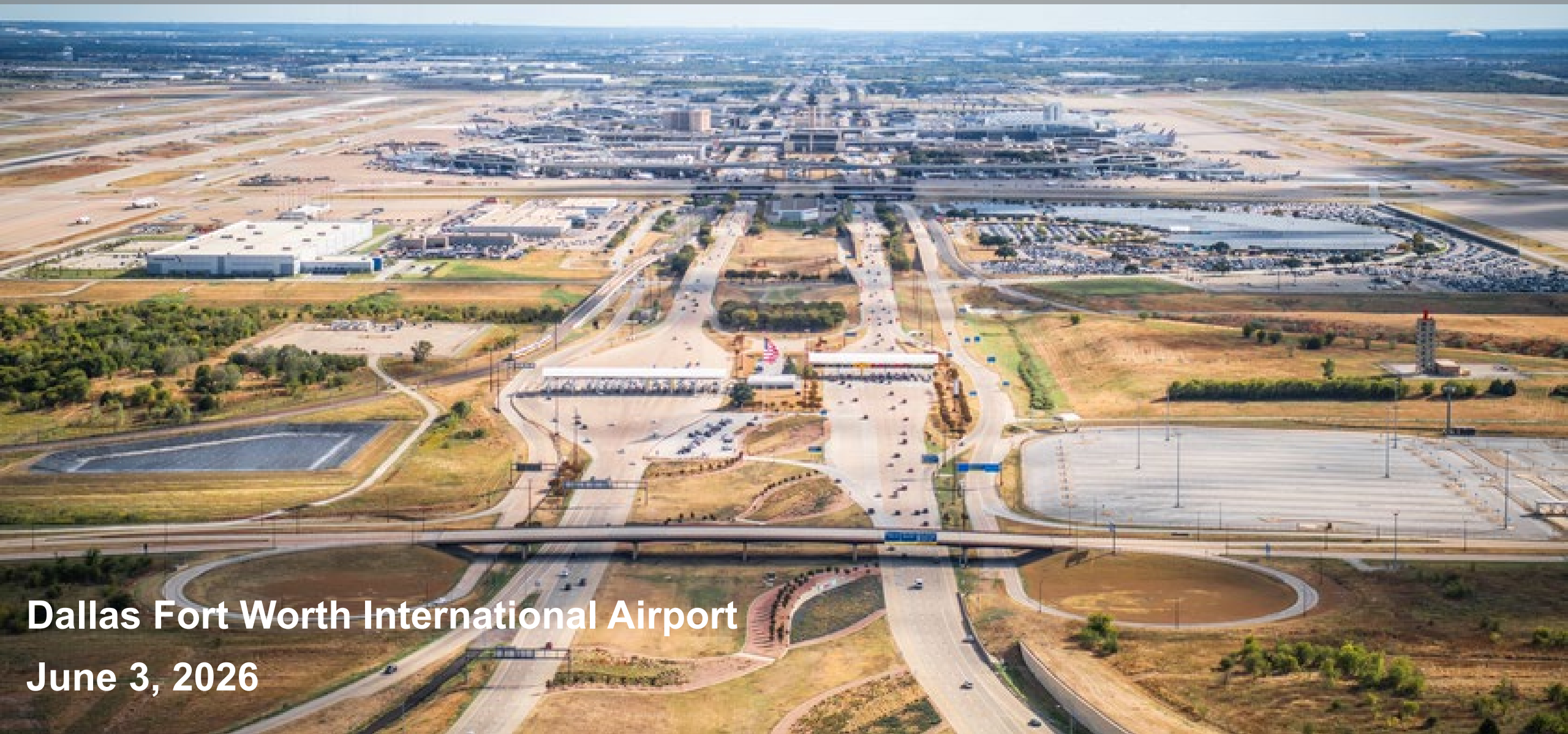
Networking & Vendor Showcase

1:00 PM to 1:30 PM

Join our curated vendors in the lobby for a networking and a vendor showcase from 1:00pm - 1:30pm.

DFW Concessions Outreach



Dallas Fort Worth International Airport

June 3, 2026


DFW
DALLAS FORT WORTH INTERNATIONAL



Welcome

Ken Buchanan

Chief Revenue Officer
Executive Vice President
Customer Experience & Revenue Management

DFW Forward



DFW Overview

Zenola Campbell

Vice President
Concessions

Thank You to Our Vendors!

NCTRCA NORTH CENTRAL TEXAS REGIONAL CERTIFICATION AGENCY

BY WAY OF DALLAS

FAST-TRAK CONSTRUCTION, INC.

GUYSTEN
MEN'S LUXURY BATH & BODY CARE

Econwash Express Cleaning

SNOWIE FT. WORTH

CDNG Créatif Design Namasté Galería

Del Campo EMPANADAS®

AIRLINE EMPLOYEE SHOP
AirlineEmployeeShop.com

WOOPS!™

Mini Cravings?

TOWNES COFFEE + QUICK EATS

LiftFund
DREAM IT. FUND IT.

ARCHIPHY
Architecture and Interiors

NO RIVALS

DFW

Agenda



Welcome	Zenola Campbell
	Ken Buchanan
Agenda & DFW Overview	Zenola Campbell
Panel: Fort Worth Spotlight	Erica Mulder
Passenger & Operational Insights	Sharon McCloskey
Airline Activity	Milton De La Paz
DFW Construction Projects	Felipe Cruz Calderon
Break & Networking	
Business Development	Tamela Lee
DFW Concessions	Jennifer Simkins
Q&A & Closing Remarks	Zenola Campbell

This presentation will be posted on the DFW Concessions website.







History of DFW International Airport

1965

The cities of Dallas and Fort Worth formed an interim Board to plan and develop what would become DFW Regional Airport





Construction had begun based on the Master Plan that included the unique semi-circular design for up to **13 terminals**

1968





Then

DFW Regional Airport
World's largest by land
Four terminals
Three runways
66 gates
Nine airlines
6.8 million passengers
75,000 tons of cargo

Today

DFW International Airport
Top six largest in world by land
Six (constructed) terminals
Seven runways
160+ gates
33 airlines
86.3 million passengers
856,000 tons of cargo

$78B Annual Economic Contribution

684K Jobs Supported



Our Vision: Travel. Transformed.

Our Mission: We discover new ways to care for our customers, inspire our employees, and strengthen our communities to create an exceptional Airport experience. **Every. Day.**

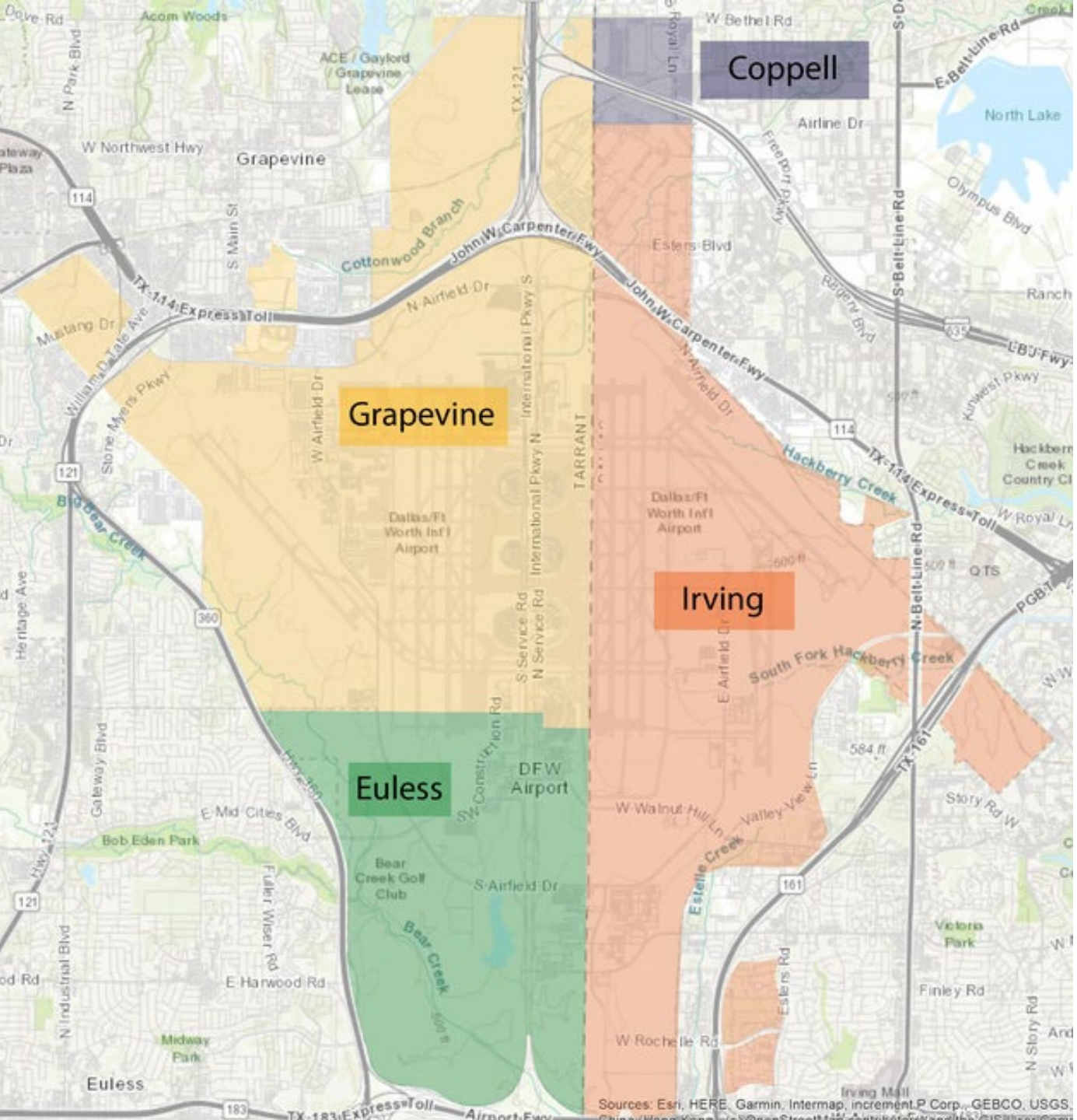


17 Miles

From Owner Cities
Dallas & Fort Worth






Coppell
Grapevine
Irving
Euless
DFW Airport
Dallas/Ft Worth Int'l Airport
Grapevine Lake
North Lake
Bob Eden Park
Bear Creek Golf Club
Midway Park
Victoria Park
Irving Mall
Sources: Esri, HERE, Garmin, Intermap, increment P Corp., GEBCO, USGS,

Host Cities



DFW DALLAS FORT WORTH INTERNATIONAL AIRPORT

BY THE NUMBERS

LIKE A CITY - DFW has its own

- Zip code
- City designation
- Police
- Fire and Emergency Medical Departments

DFW COVERS MORE THAN **26.9** **SQ. MILES**

Larger than Manhattan

DFW AIRPORT BOARD EMPLOYEES

OVER 2,200

ON-AIRPORT EMPLOYEES APPROXIMATELY **60,000**

4th in the world for **passengers**

85.7M – Airports Council International (ACI) 2025

86.3M Passengers

FY2025

33 PASSENGER AIRLINES

DOMESTIC: 13

FOREIGN FLAG: 20

19 CARGO AIRLINES

3rd in the world for **operations**

743K - ACI 2025

746K Operations

FY2025

2nd in total **destinations**

U.S. airports, March 2026

78 INTERNATIONAL DESTINATIONS

Largest **Carbon Neutral Airport** in the world

First Carbon Neutral Airport in North America

ACI AIRPORTS COUNCIL INTERNATIONAL

BEST LARGE AIRPORT in North America for Customer Satisfaction –4 years in a row

TOTAL **CARGO**

856,352 U.S. TONS

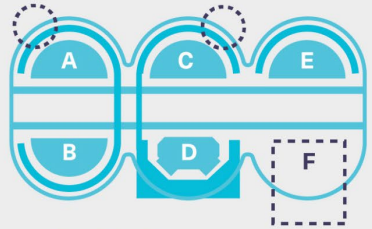
FY2025

193 DOMESTIC DESTINATIONS

Every major city in the continental United States can be accessed within **FOUR HOURS**

7 TOTAL RUNWAYS

5 TERMINALS (Expansions Underway)



160+ GATES

DFW Forward

$12B Capital Plan Underway

180+ Projects

- Terminal Expansions
- Airfield Enhancements
- Roadway Improvements

ECONOMIC IMPACT

$78 Billion	Total Economic Impact (Gross Product)
$48 Billion	Payroll Supported
684,000	Jobs Supported
$18 Billion	Visitor Spending

Tax Revenue

State **$5 Billion** | Local **$3 Billion**

April 2026

Creating Economic Opportunities

DFW is an important asset for the community, responsible for creating jobs and providing opportunities for business, big and small.

We prioritize working with the local business community to create economic opportunities.



Community Partners

DFW Airport works with community partners who are instrumental to DFW's business development efforts.

They play a vital role in helping to connect DFW with business owners and promoting business opportunities.



Fort Worth Spotlight



Erica Mulder

Vice President
Community and Government Relations

Fort Worth Spotlight



Moderator

Erica Mulder

Vice President Community & Government Relations for DFW Airport



Ken Buchanan

EVP, Chief Revenue Officer for DFW Airport



Mitch Whitten

President & CEO Visit Fort Worth



Ericka Garza

President & CEO Fort Worth Hispanic Chamber of Commerce



William Johnson

Director of Economic Development & Compliance for Fort Worth Metropolitan Black Chamber



Passenger & Operational Insights

Sharon McCloskey

Vice President
Customer Experience

DFW Forward

Customer obsession is a state of hyperfocus on creating a better customer experience from the customer's perspective. Customer obsessed describes a commitment to having a customer-first approach.





Sensible Seekers

WHO THEY ARE

- Average trips per year: 5
  - Business: 3
  - Leisure: 2
- Millennials and Gen X travelers
- Average income, but does not spend much at the airport
- Go to the gate and stay at the gate
- Prefer to keep to themselves, typically working while at gate
- Key Emotions: Anxious, Impatient, and Stressed

Size	Average Spend
14%	$28



Affluent Adventurers

WHO THEY ARE

- Average trips per year: 11
  - Business: 5
  - Leisure: 6
- Mostly Millennials
- Higher than average income, high spend at the airport
- Navigate the airport beyond the gate
- Engage with variety of airport concessions offerings
- Key Emotions: Excitement, Happy, Relaxed and Hopeful

Size	Average Spend
23%	$68



Occasional Jet-Setters

WHO THEY ARE

- Average trips per year: 3
  - Business: <1
  - Leisure: 3
- Millennials and Gen X travelers
- Lower than average income, but high spend at the airport
- Navigate the airport beyond the gate
- Not concerned about spending money on things they enjoy
- Key Emotions: Excitement, Anxious, and Relaxed

Size	Average Spend
18%	$72



Golden Voyagers

WHO THEY ARE

- Average trips per year: 12
  - Business: 4
  - Leisure: 8
- Mostly Boomers and some Gen X travelers
- Higher than average income, but does not spend much at the airport
- Navigate the airport beyond the gate
- Willing to pay a premium for quality items
- Key Emotions: Bored and Calm

Size	Average Spend
10%	$20



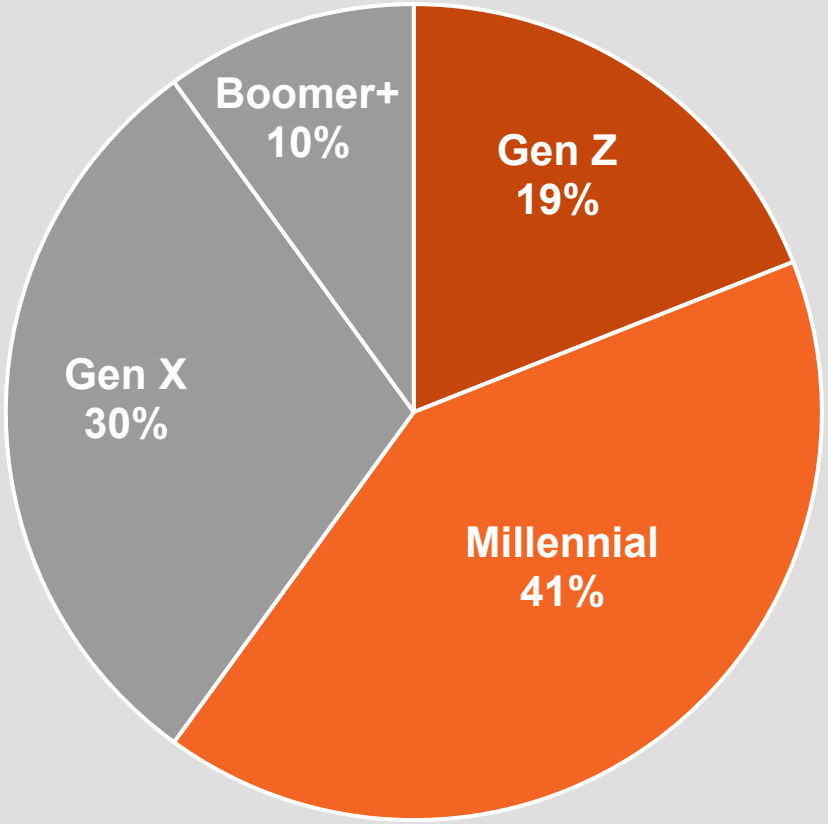
Prudent Passengers

WHO THEY ARE

- Average trips per year:3
  - Business: 0
  - Leisure: 3
- Mostly Boomers and some Gen X travelers
- Lower than average income, and does not spend much at the airport
- Go to the gate and stay at the gate
- Thinks that life is better with less
- Key Emotions: Anxious, Impatient, and Stressed

Size	Average Spend
35%	$21

What is your age?
By Generation



The youngest generations make up a majority of DFW customers.

Source: DFW Customer Satisfaction Study FY26TD N=6,060

Generational Insights

INNOVA MARKET INSIGHTS

International Food Information Council

Millennials show strong **ingredient awareness** and seek a broad range of **diverse cuisines**.

"This terminal could use a larger variety of food options. I see a lot of restaurants that sell burgers."

- 03/10/2026, Male Business Traveler

Millennial and Gen Z purchasing behavior is strongly shaped by **price** and ongoing **financial stress**.

"A lot of the regular fast-food places here have inflated prices. I don't like that, so I'd rather get a few snacks."

- 09/17/2025, Female Business Traveler

Source: Innova Market Insights | International Food Information Council
Customer Satisfaction Study (CSS) FY25- FY26TD Q: What could DFW Airport do to increase your Overall Satisfaction score to a 5 or Excellent? Please be specific.

DFW Customer Preferences

Comfortable Food & Beverage Spend

DFW Average
per person

$20.44

Dwell Time ≤ 90 Minutes
per person

$18.22

1 in 2 DFW travelers has a dietary preference or need.

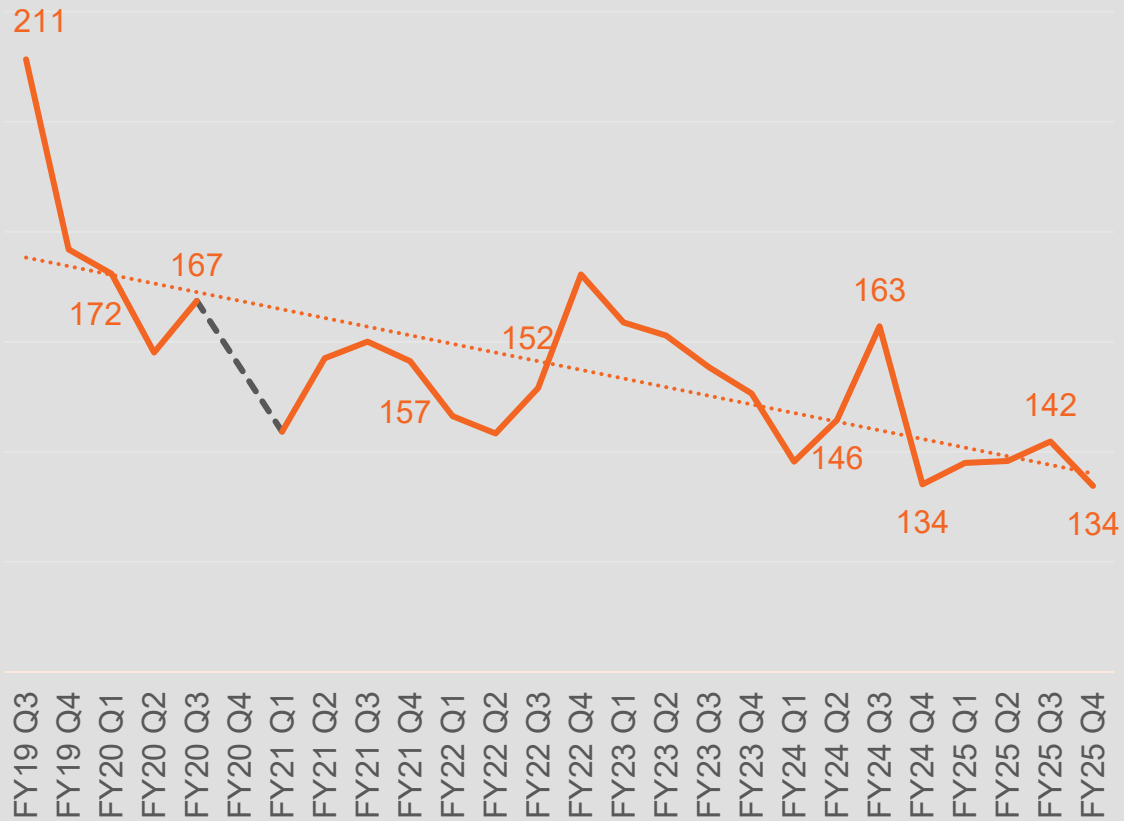


Most travelers follow these diets by preference.

- Dairy-free
- Gluten-free
- Vegetarian
- Fish/Shellfish free
- Vegan
- No red meat
- Pescatarian

Source: Concession Concepts: Insights & Opportunities, December 2025. N=296
Q: Today, how many minutes did you have in the terminal where you could shop, eat, and relax prior to boarding your flight out of DFW?
Q: As I read out the following list of dietary restrictions, for any that apply to you, please indicate whether they are a preference or a need
Q: How much would you be comfortable spending per person on food and beverage at the airport today?

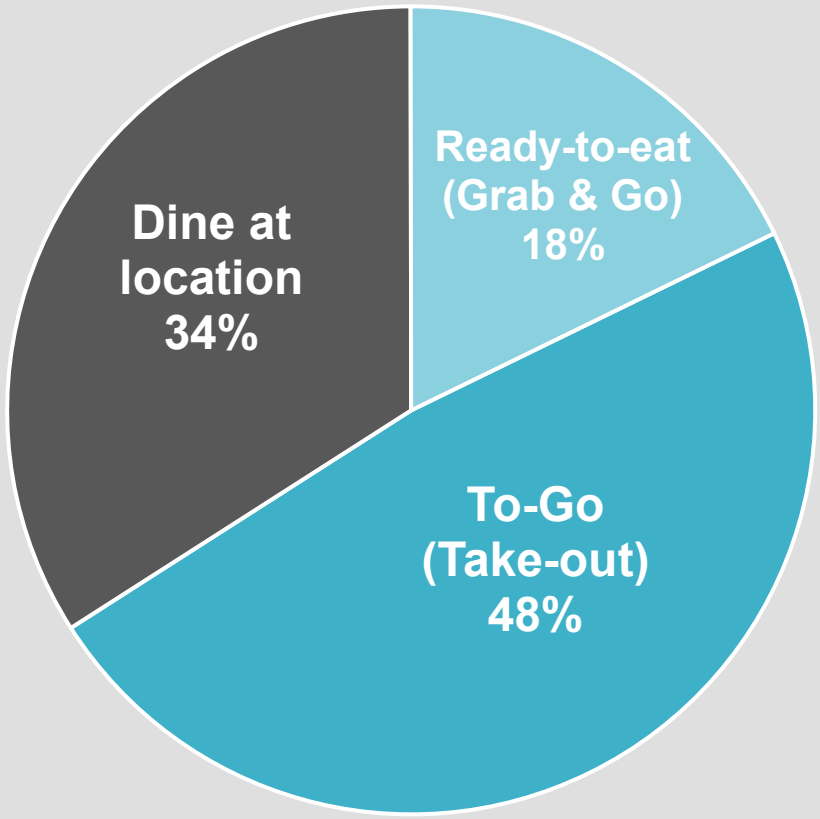
Traveler Dwell Time (Minutes) FY19-FY25



Traveler dwell times are tight, so customers have less time in the terminal than they had in the past.

Customer Satisfaction Study (CSS) FY19-FY5: Q: Today, how many minutes did you have in the terminal where you could shop, eat, work or relax prior to boarding your flight out of DFW?. ▬▬▬▬▬▬ FY20 Q4 data missing due to COVID-19.

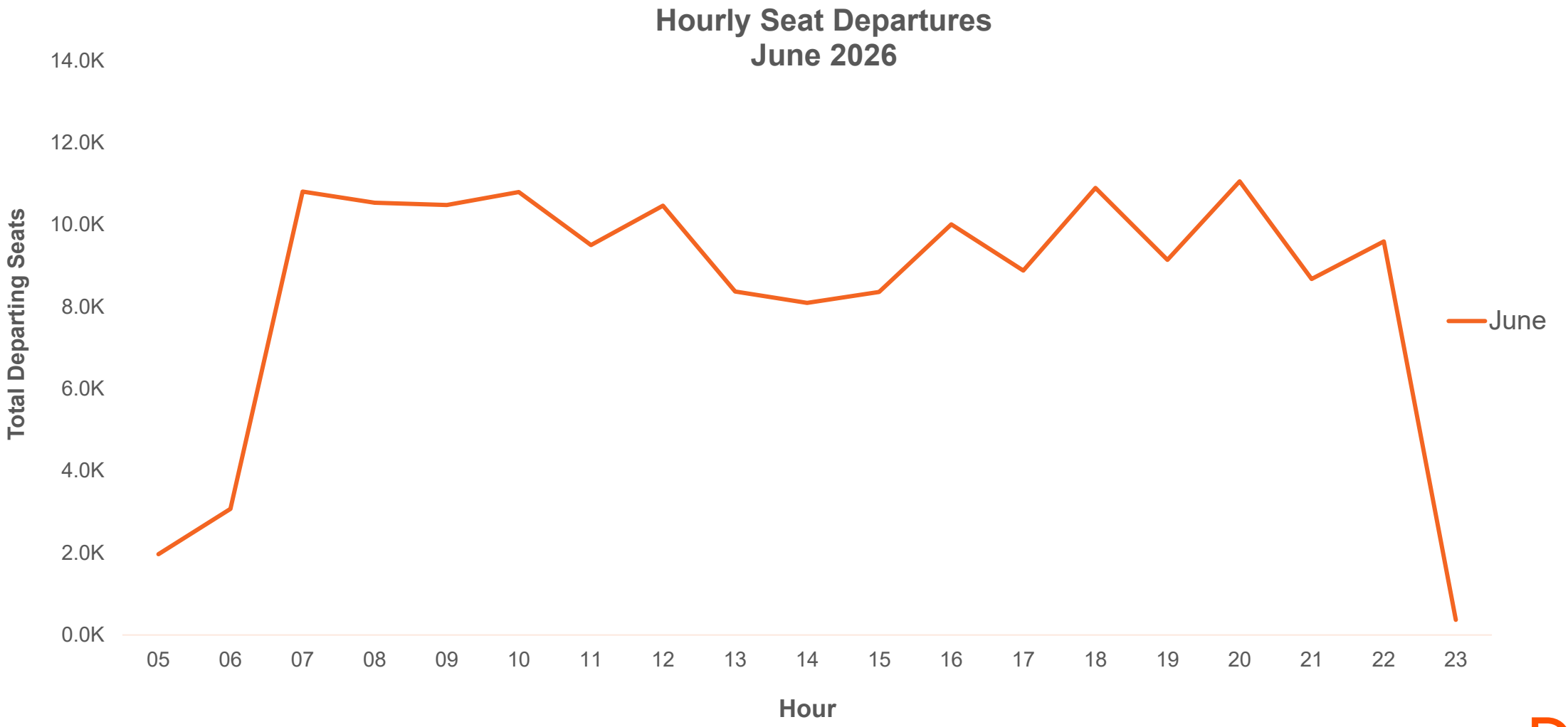
How did you order your Food & Beverage?



About two-thirds of passengers take their food & beverage to-go, whether by Take-out or Grab & Go.

Source: Concessions Customer Insights study. N=193

Passenger volumes are consistently high throughout the day.



* Seat count exported from Diio on 05/20/2026. Seats shown represent the 90th percentile of hourly scheduled departing seats.



ACI Airport Service Quality Award Winner **2022, 2023, 2024 and 2025!**

Dallas Fort Worth International Airport

Best Airport over 40 Million Passengers in North America

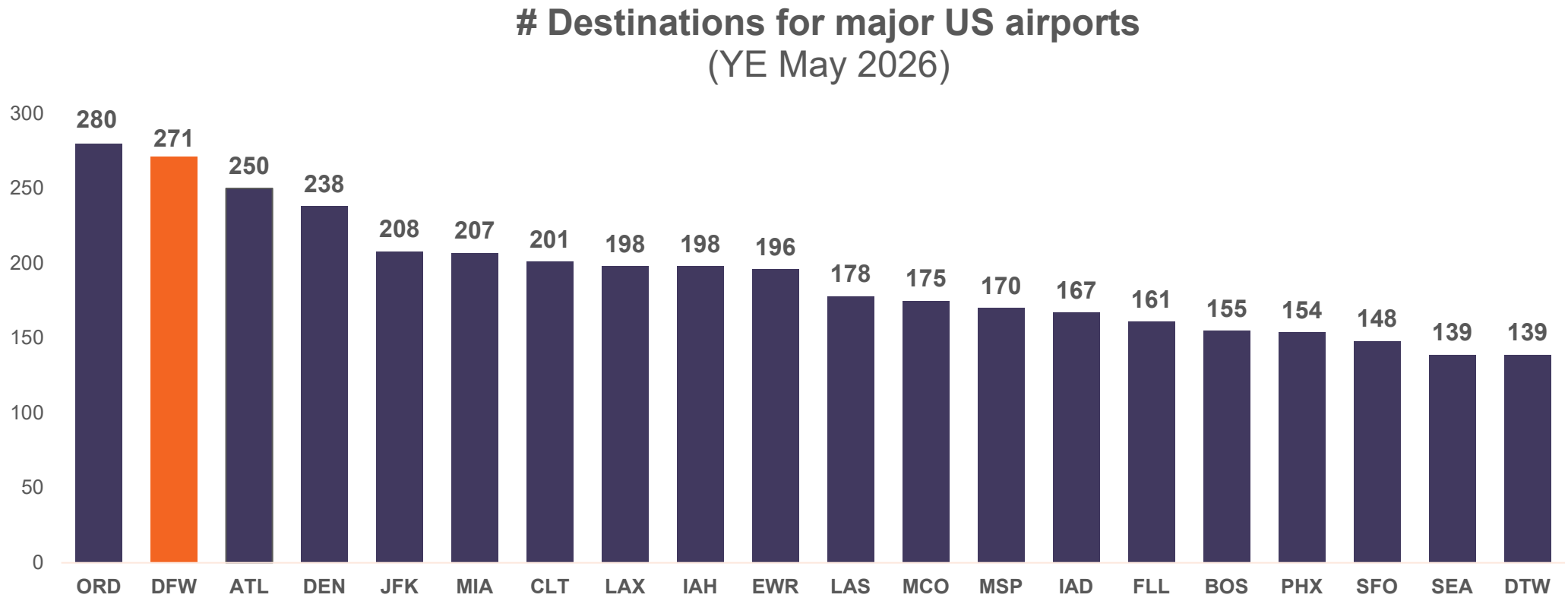

American

Air Service Updates



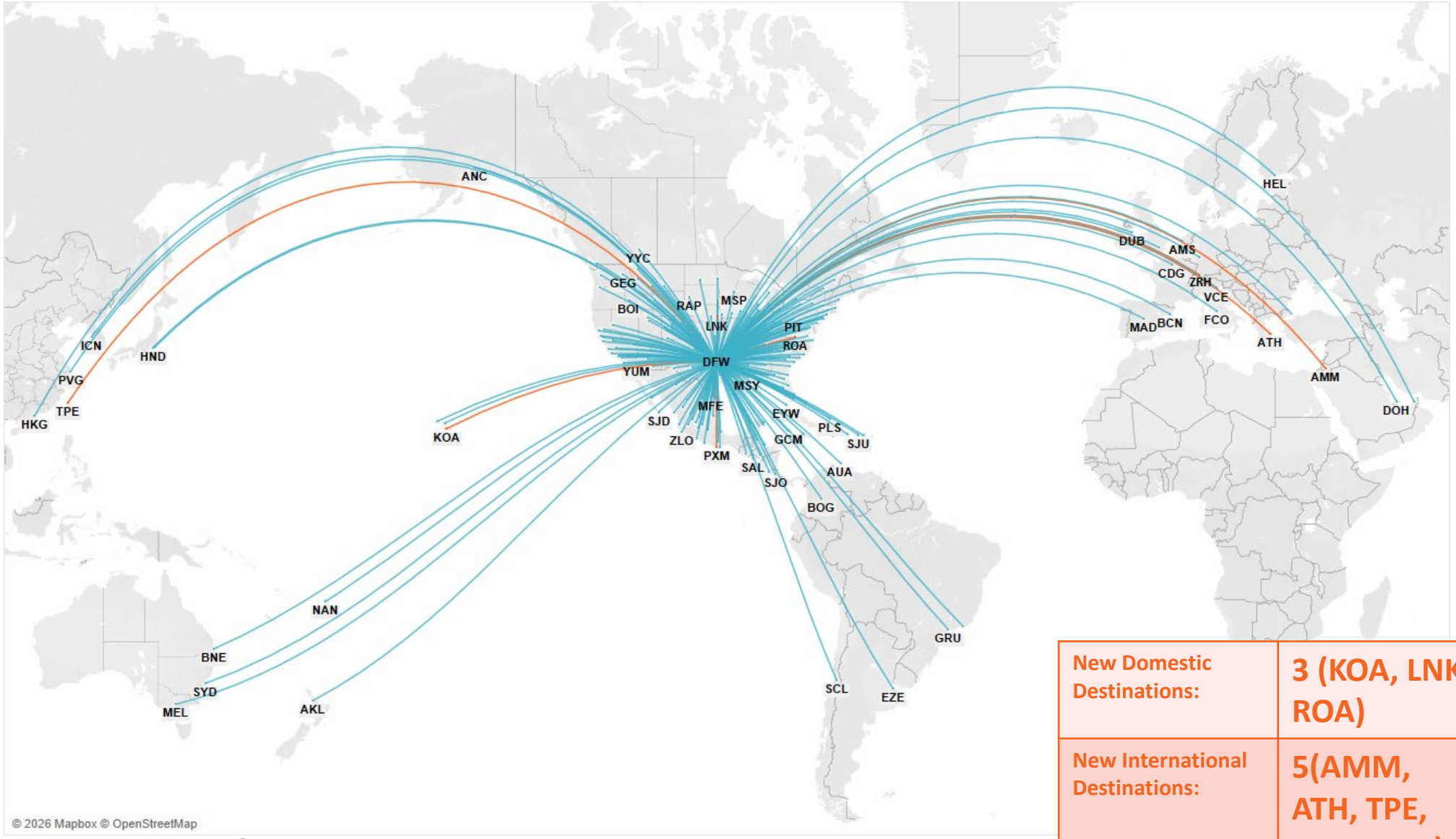
Milton De La Paz
Vice President
Air Service Development and Cargo

DFW ranks 2nd for destinations vs all US airports



Source: Diio Mi Schedules YE May 2026 as of May 28th, 2026 and DFW internal data.

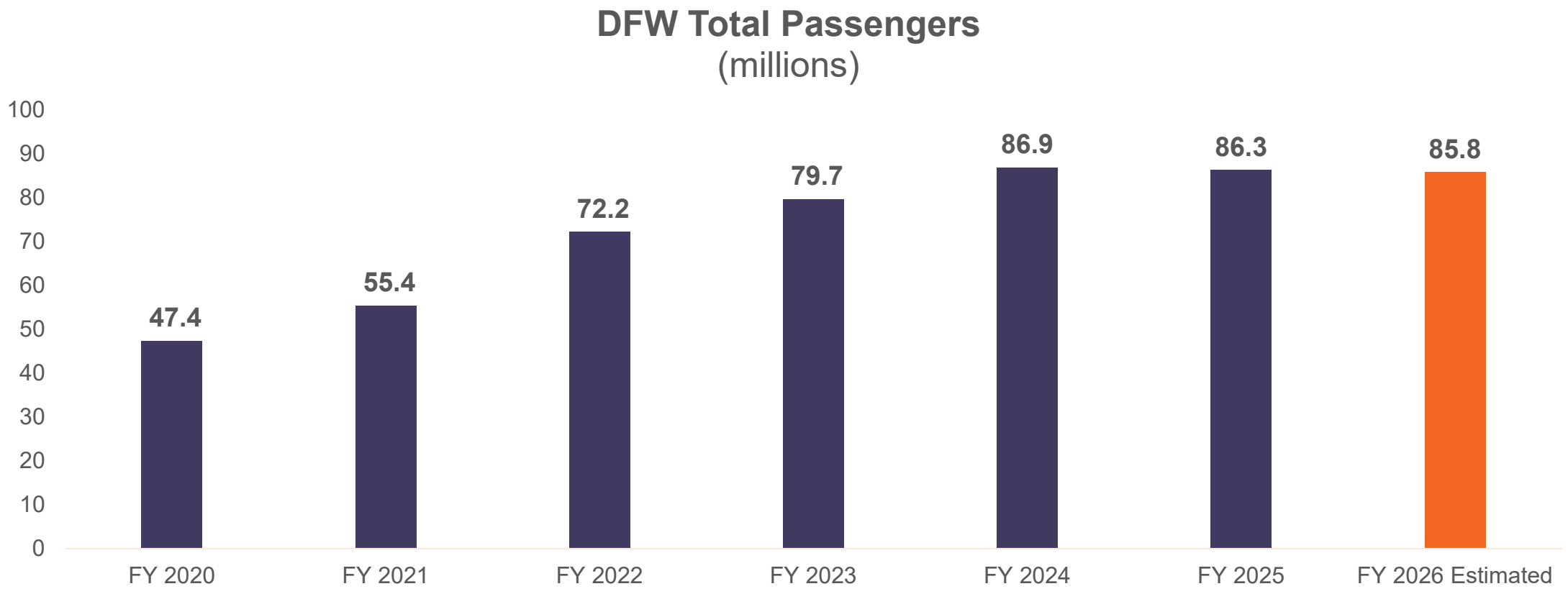
8 new services to launch, so far, in FY26



New Domestic Destinations:	3 (KOA, LNK, ROA)
New International Destinations:	5(AMM, ATH, TPE, PXM, ZRH)

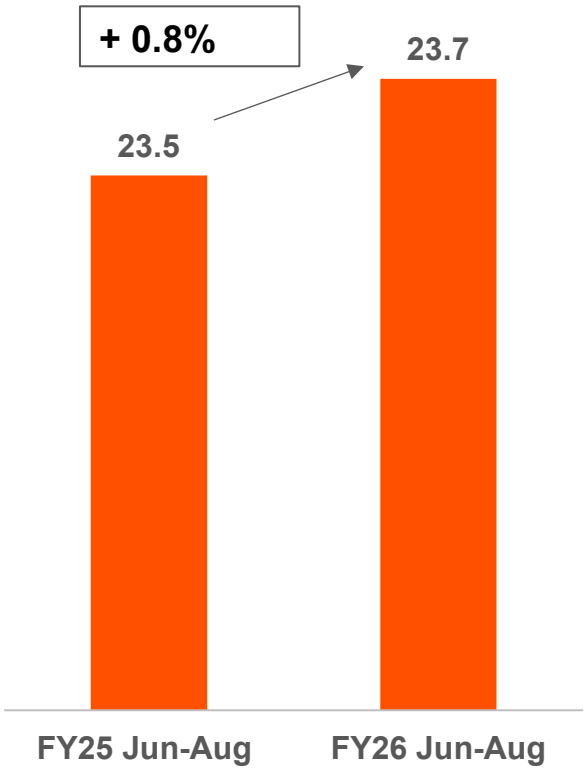
Source: DFW Internal Statistics

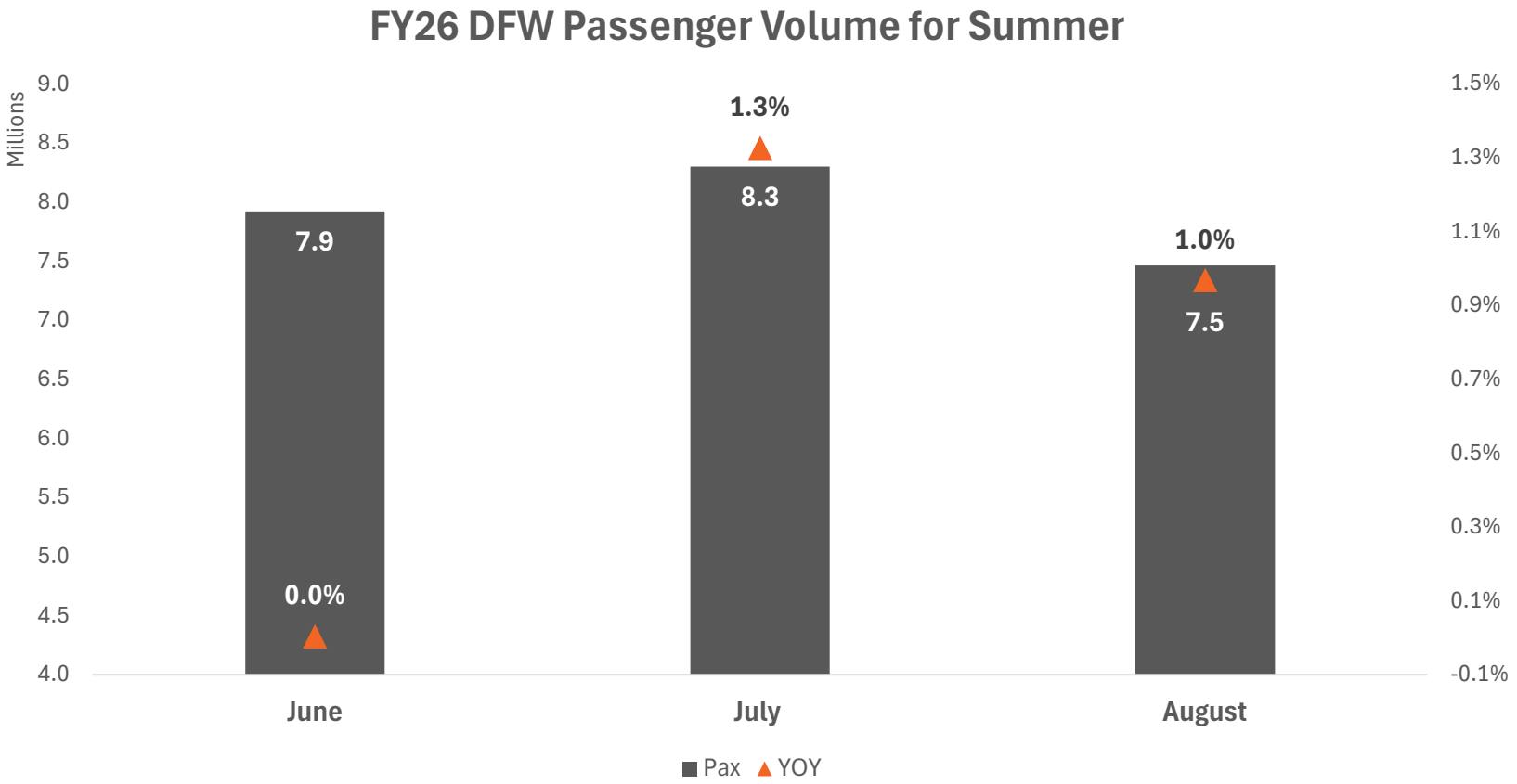
DFW is projected to reach 85.8M passengers in FY26



Source: DFW Internal Statistics

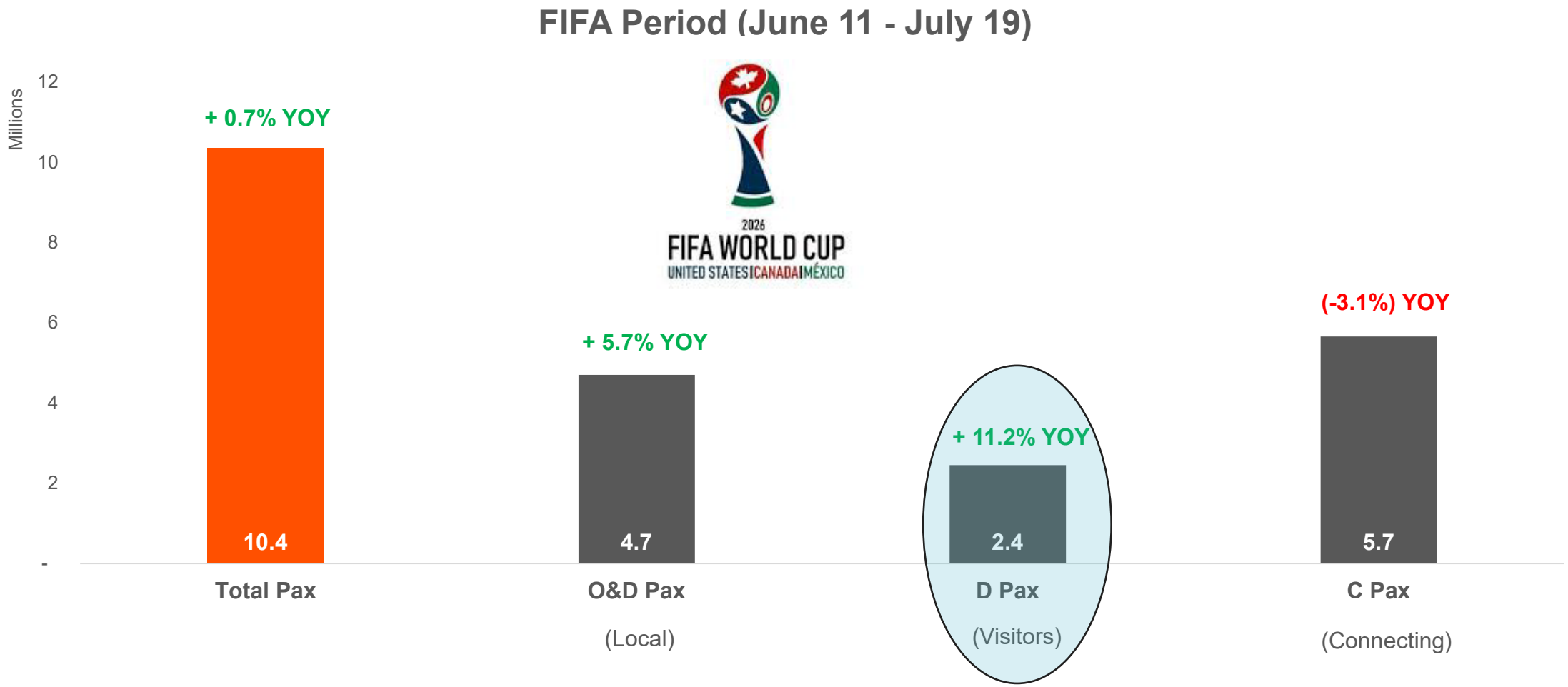
DFW summer passenger volumes are expected to reach 23.7M, up 0.8% YOY



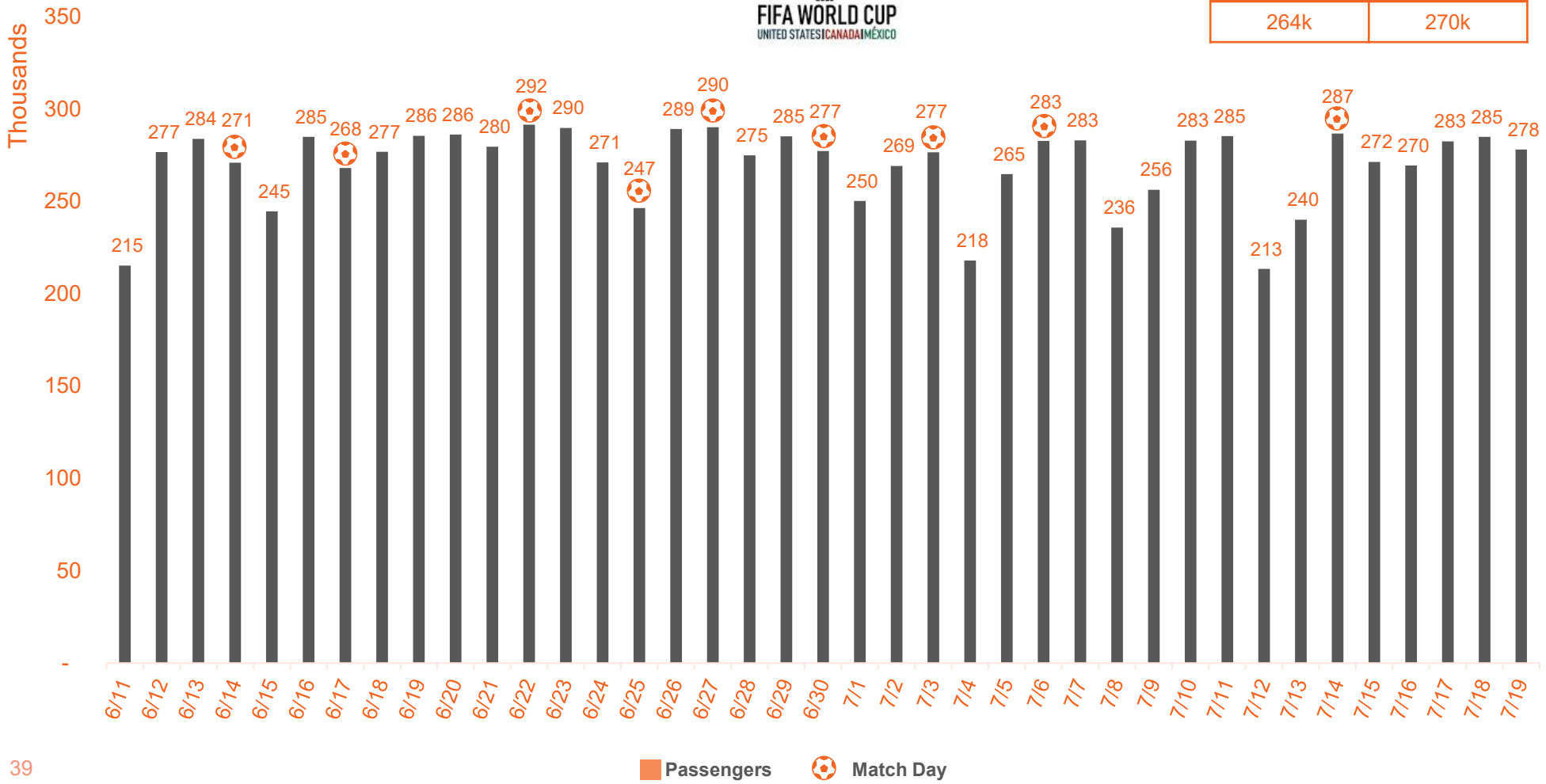


Source: DFW Internal Data

During FIFA, visitors are expected to grow significantly, while overall pax grows marginally



Total pax volumes during FIFA will be in line with a typical summer, averaging 270K daily pax



Average Daily Passengers During the FIFA Period

2025	2026
264k	270k

Group Stage Matches

Sunday
June 14, **3pm**
vs

Thursday
June 25, **6pm**
vs

Wednesday
June 17, **3pm**
vs

Saturday
June 27, **9pm**
vs

Monday
June 22, **12pm**
vs

Knockout Matches

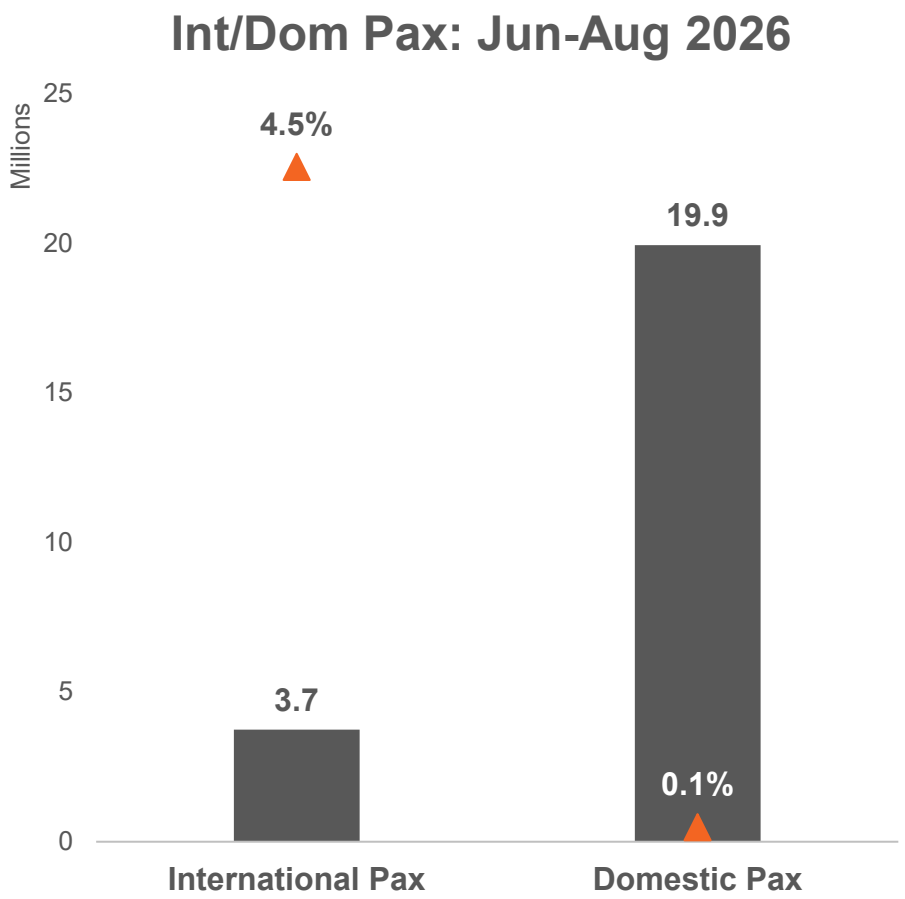
Tuesday
June 30, **12pm**
Round of 32

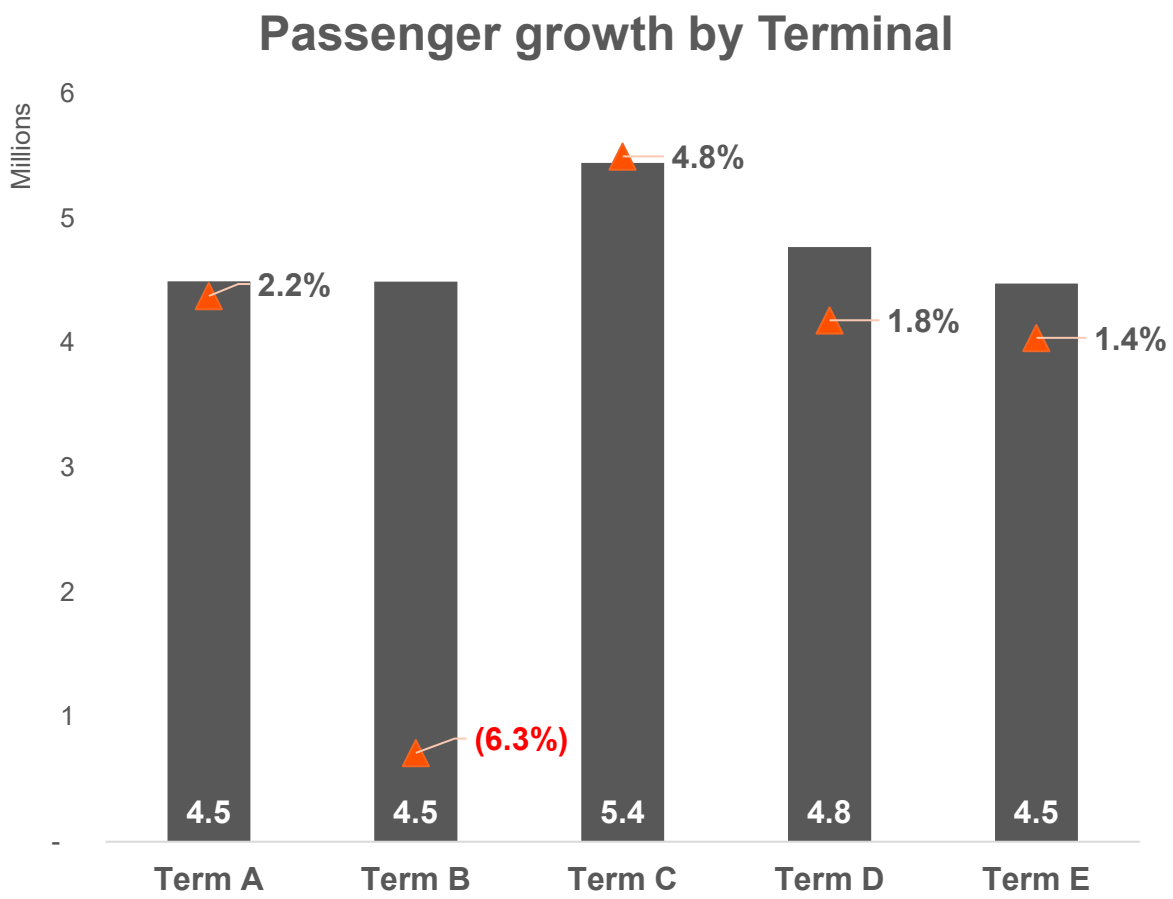
Monday
July 6, **2pm**
Round of 16

Friday
July 3, **2pm**
Round of 32

Tuesday
July 14, **2pm**
Semifinal

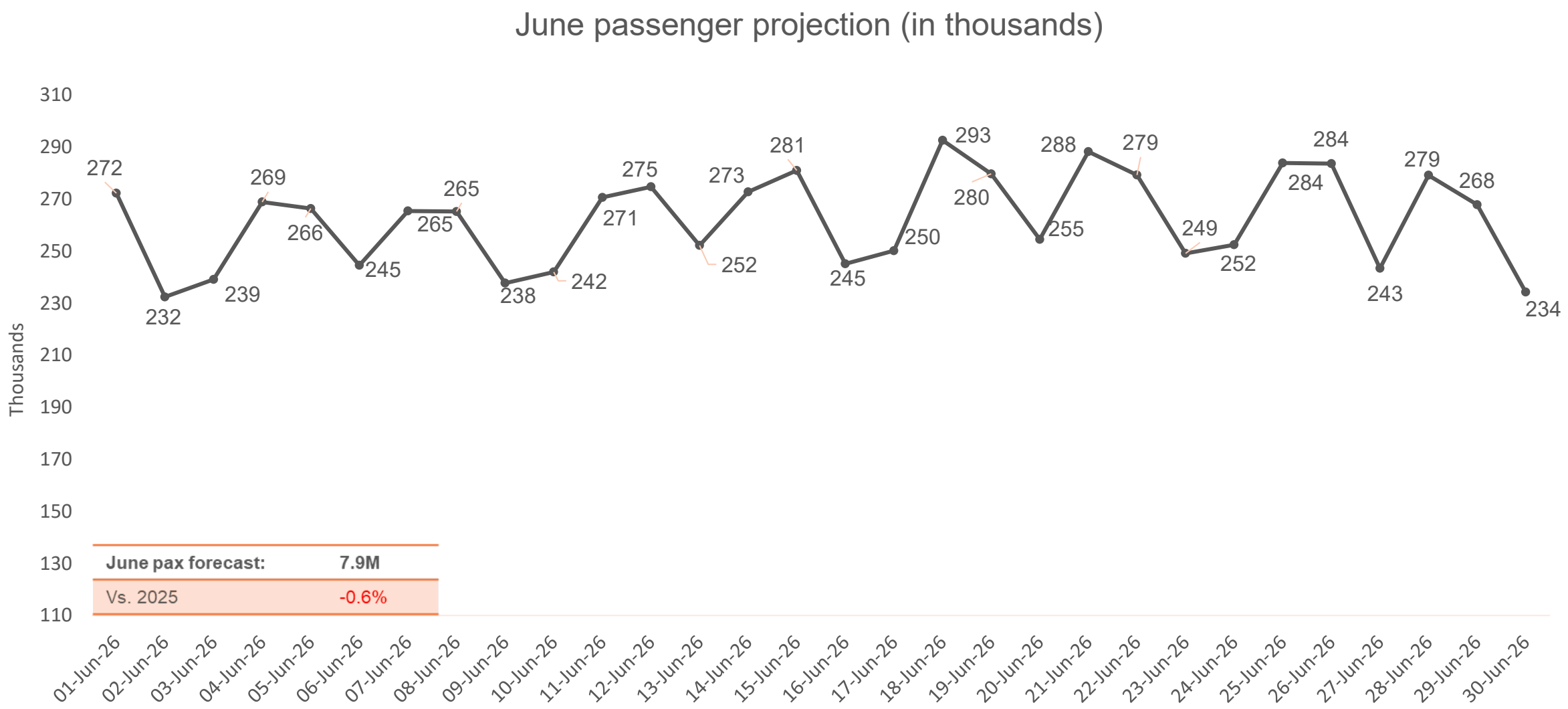
International pax are expected to grow 4.5% YOY, while domestic stays flat





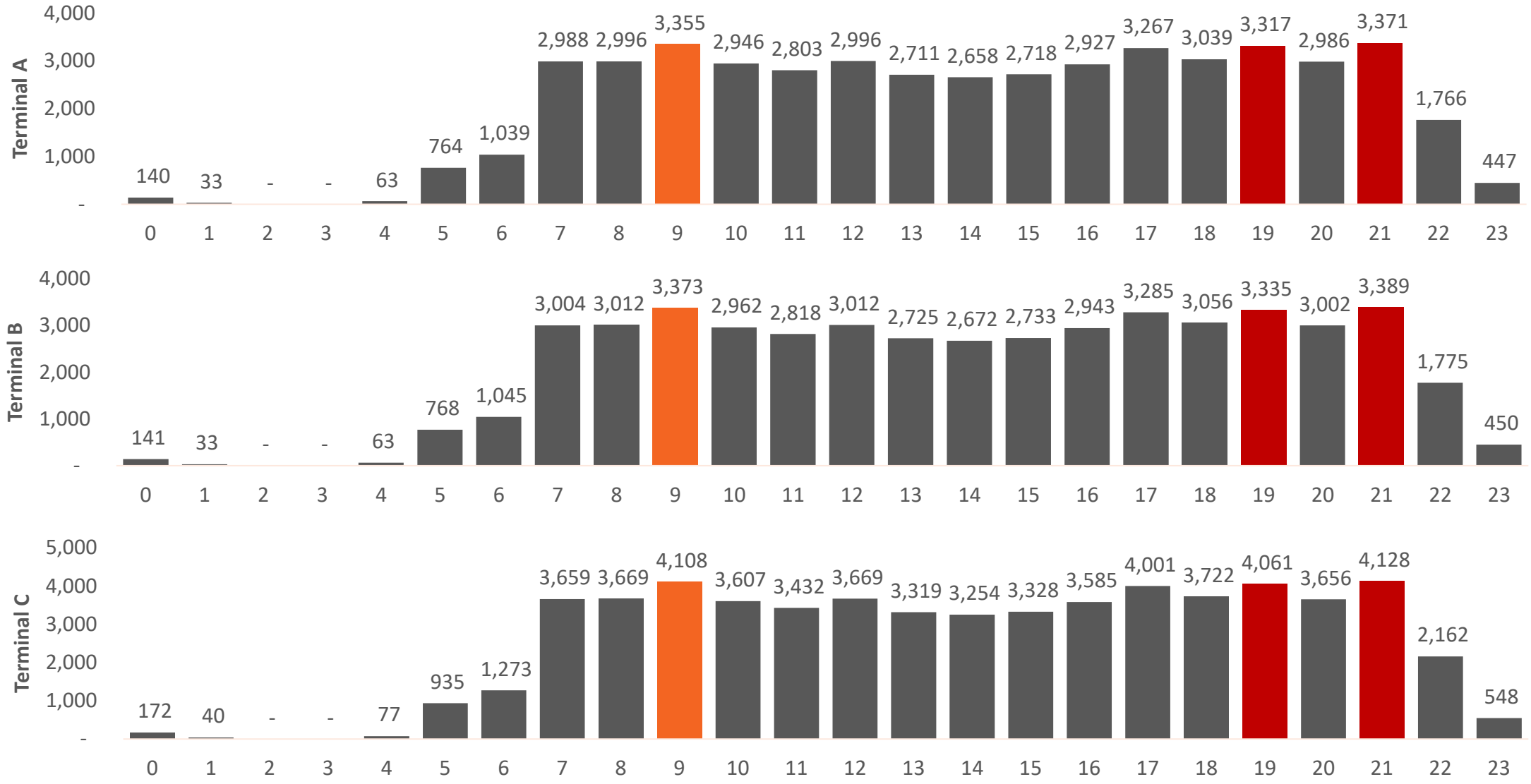
Source: DFW Internal Data

Pax trend by day (262 avg.) for June



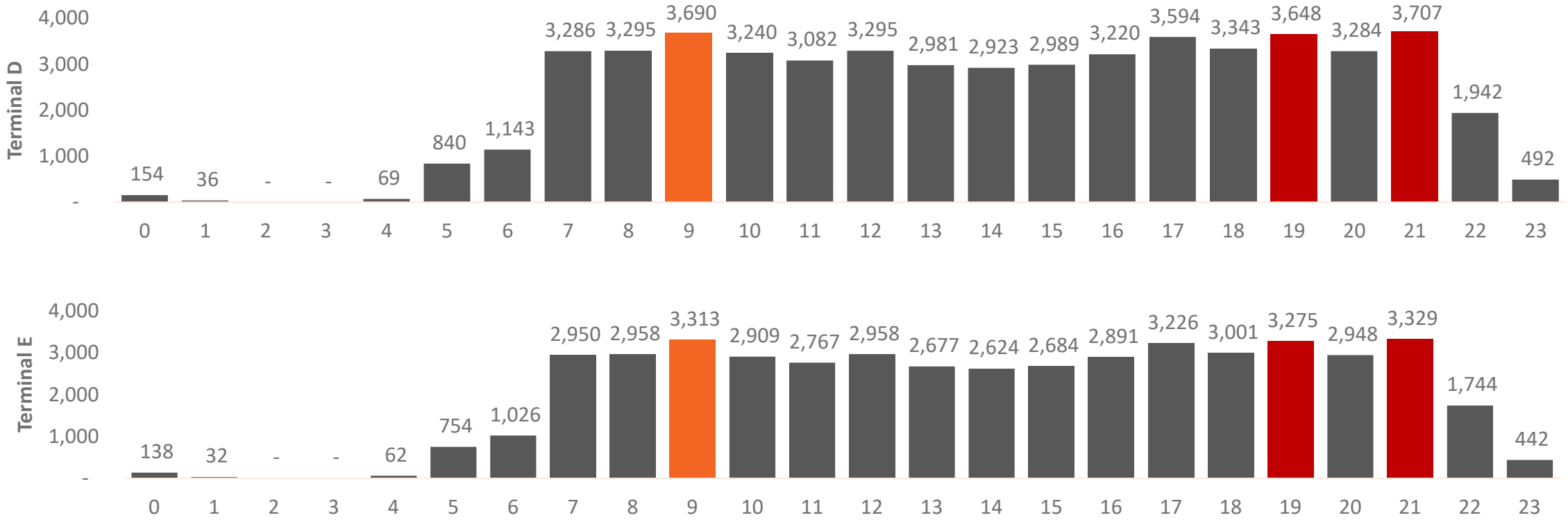
Source: DFW internal estimates

DFW terminal split by hour - June



Source: DFW internal estimates

DFW terminal split by hour - June



Source: DFW internal estimates



DFW Construction Projects

Felipe Cruz Calderon

Assistant Vice President
Design & Construction Management

Key Projects

- International Parkway Modernization
- Terminal A & C Piers
- Terminal F Concourse
- Restroom Modernization Program



Airport Infrastructure

- 17,000+ Acres of property
- 7 Runways
- 12 Airfield bridges
- 122 Landside bridges
- 1,288 lane- miles of roadways
- Over 75M Sq. ft. of airfield pavement overall
- 4.85M Sq. ft. of assets reverting
- 474 miles of water, sanitary sewer and storm water infrastructure



Leadership Team



Tammy Huddleston
Vice President



Felipe Cruz Calderon
Assistant Vice President
Project & Design Mgmt.

- CTA Expansion Program
- Terminal F Program



Fabian Cornelious
Assistant Vice President
Project & Design Mgmt.

- Civil Airfield Program
- Civil Landside Program
- Facilities Program



Omar Elbagalati
Assistant Vice President
Code, Construction & Survey

- Building Code
- Permitting
- Quality Assurance
- Commissioning
- Traffic Engineering & Survey

Infrastructure Capital Program

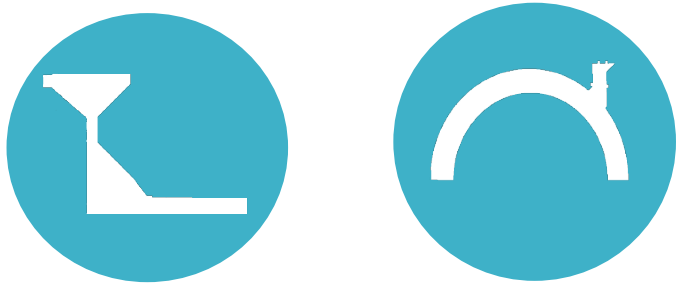


AIRFIELD LANDSIDE FACILITIES

2026 – 2036

$5 Billion

Expansion Program



TERMINAL F CTA EXPANSION

2020 – 2030

$8.3 Billion

INTERNATIONAL PARKWAY MODERNIZATION

Project Highlights & Impacts

Project Description

Phase 1, removed the 50+ year old left-hand exit flyover bridges that were at end-of-life and serve as the main access for Terminals A, B, C from International Parkway. These have been replaced with right-hand exits to enhance safety and wayfinding for our customers. Additionally, the existing High Mast Light (HML) poles have been replaced and updated with LED lights. Phase 1, was successfully completed prior to the FIFA World Cup.

Key Dates

Start of Construction: **Q2 2024**
Phase 1 Completion: **May, 2026**
Phase 2 T/E Anticipated Completion: **Q4 2027**



Project Update

Phase 1

- Terminal B | Completed October 20, 2025 Terminal A | Completed December 18, 2025 Terminal C | Completed May 21, 2026

Phase 2

- Terminal E | Q3 2026 – Q4 2027

TERMINALS A & C PIER EXPANSION

Project Highlights & Impacts

Project Description

The Terminal A & Terminal C Pier projects will provide a net 9 gate increase by adjusting our trademark semicircle terminal shape. These piers built on the modular construction that we pioneered during the High C Gates project, with 245,000 SF being created through the utilization of 13 modules.



Key Dates

Start of Construction: **Q2 2024 (Pier C), Q2 2024 (Pier A)**
Anticipated Completion: **Q2 2026 (Pier C) Q4 2026 (Pier A)**

Project Update

- **American Airlines operated their first flights from the Terminal C Pier on April 8** out of gates C33 and C34. The remaining seven gates are expected to open in the coming weeks.
- Pier A scheduled to complete per project schedule in the Fall of 2026.

TERMINAL F PHASE 1

Project Highlights & Impacts

Project Description

Terminal F was originally conceived as a 15-Gate double-loaded concourse for domestic flights that would serve DFW's OALs (Other Airlines). In Q2 2025, along with our partners at American Airlines, DFW announced that Terminal F would pivot to a 31-Gate Terminal serving both international and domestic flights for American Airlines. Through nimble design & coordination, we've been able to maintain construction progress during the transition in design.



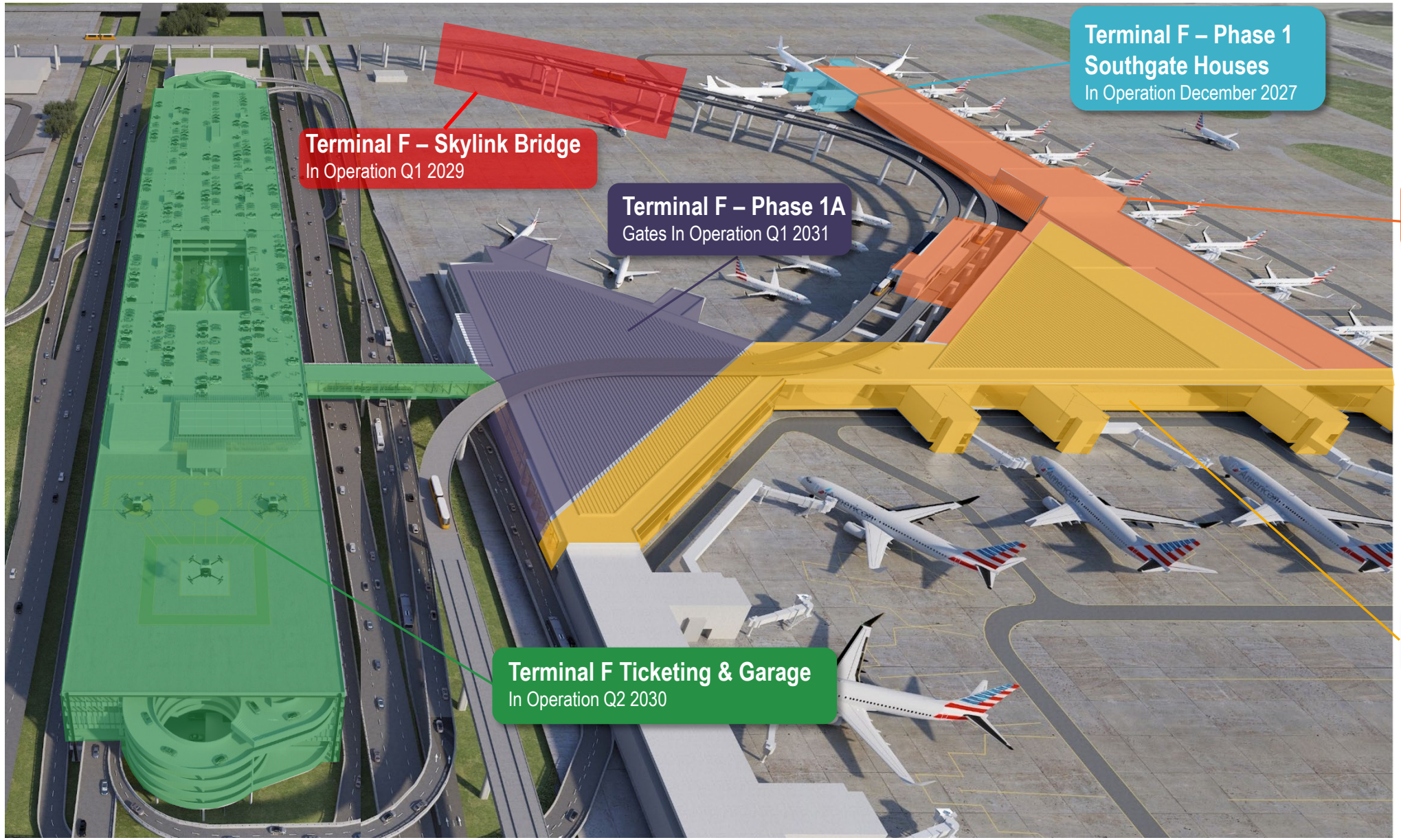
Key Dates

Start of Construction: **Q4 2024**
Opening of first 10 gates: **Summer 2027**

Project Update

- All six modules successfully transported in August 2025.
- Four of the six modules that will make up the new Skylink station were successfully been placed in February.
- Remaining two Skylink modules to be placed after Summer peak to minimize customer impacts.

TERMINAL F PHASING



RESTROOM MODERNIZATION PROGRAM

Group 3

Project Highlights & Impacts

Project Description

To ensure our restrooms meet passenger demand both today and, in the future, we'll be renovating 55 landside and airside restrooms in Terminals A, B, D, and E. We'll be utilizing modular methodology to minimize customer impacts both during initial construction and during any future work required. These renovations will improve customer experience while expanding capacity and ensuring restrooms are not over utilized allowing for a higher level of cleanliness.

Key Dates

Start of Construction: **Q3 2025**
Anticipated Completion: **Q2 2026**



Project Update

- Group 1 | Completed in Q3 2025 (3 locations).
- Group 3 | E7 and A38 restrooms completed, A18 and D36 restrooms targeted to be completed prior to FIFA World Cup.
- Group 4 | To include six locations and complete in 2028.

DFW Forward

DFW's Capital Improvement Program (CIP) is the ongoing plan to modernize, redevelop and expand the airport's infrastructure, technologies and assets, with most of the investments dedicated to major construction projects.

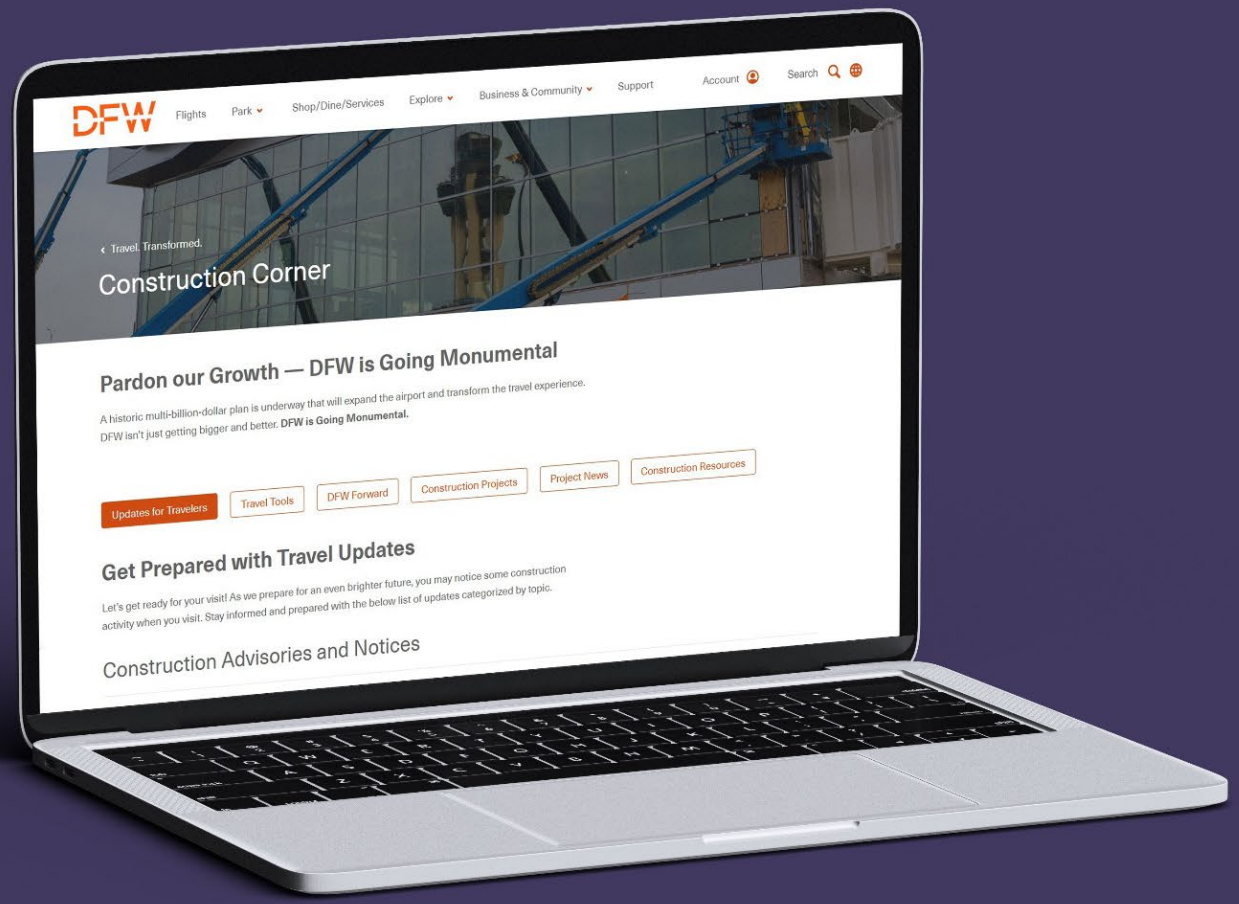
The airport isn't just getting bigger and better.

DFW is going monumental.



WELCOME TO **CONSTRUCTION CORNER**

- Updates for Travelers
- Tools to Navigate Construction
- Sign up for Construction Updates
- News and Fact Sheets



dfwairport.com/construction



Break
Networking / Vendors



Business Development

Tamela Lee

Vice President
Business Development



Business Development

Department Objectives

Ensure Fair Access to Contract Opportunities for all businesses, especially Small Business Enterprise (SBEs):

- Ensure nondiscrimination in the award and administration of procurements
- Remove barriers to participation
- Promote the utilization of SBEs
- Assist the development of firms that can compete successfully in the marketplace



Program Update

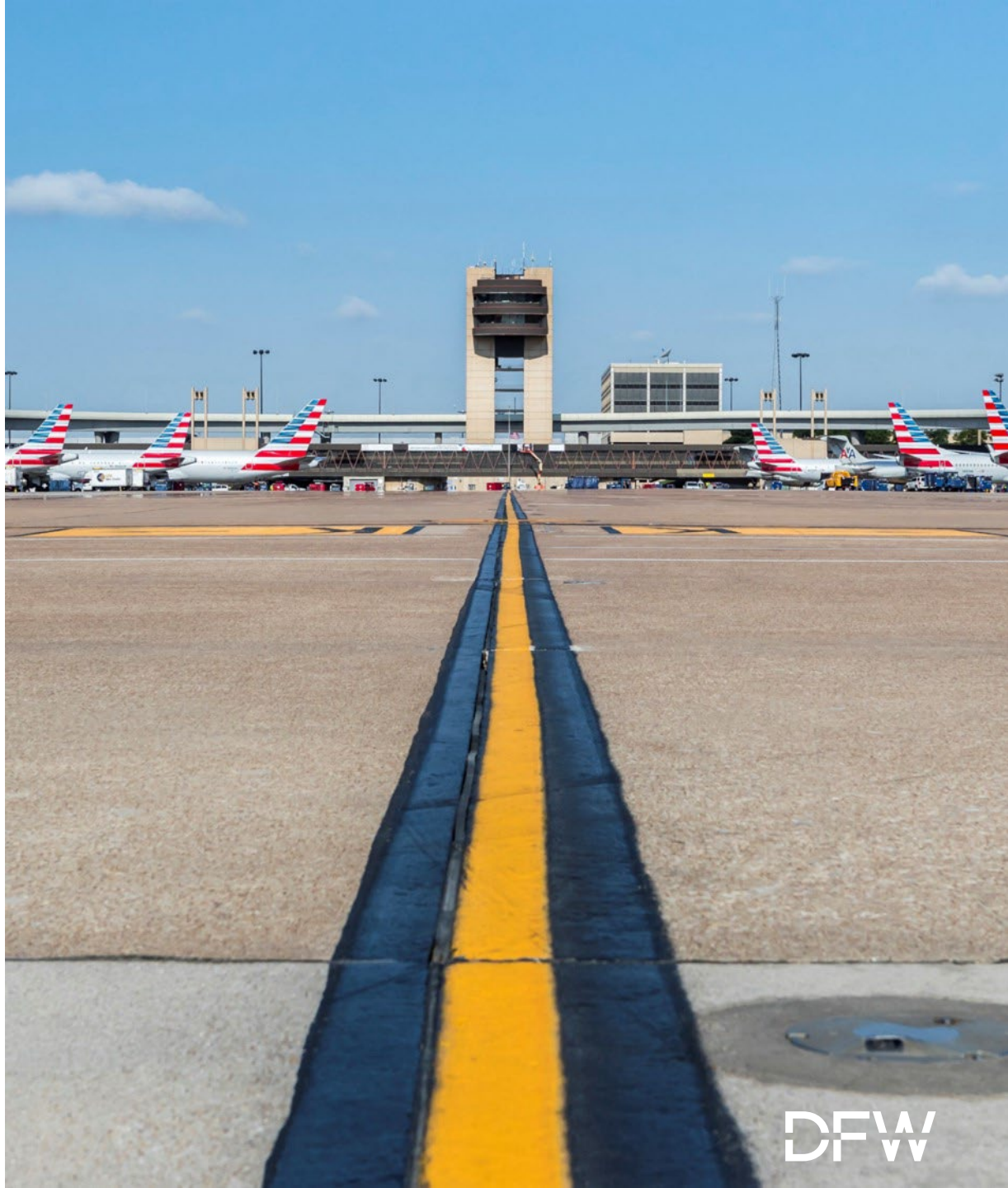
Background (Federal Programs)

- **PRIOR** to the USDOT DBE/ACDBE Program Interim Final Rule (October 3, 2025)
  - Majority owner (s) of applicant firms that were women or members of certain groups were rebuttably presumed to be socially disadvantaged
  - Majority owner(s) who were not members of these groups could demonstrate social disadvantage by providing a personal narrative demonstrating experienced circumstances of social disadvantage
- **NOW**
  - The rebuttable presumption of social disadvantage has been removed
  - Eligibility of all currently-certified DBE/ACDBE firms must be re-evaluated
    - Majority owner(s) of all currently-certified and new applicant firms must demonstrate their social disadvantage through submission of a Personal Narrative (PN).
      - Determinations of disadvantage cannot be based in whole, or in part, on race or sex
      - Based on the individual owner(s) experiences and circumstances within American society
  - Current Personal Net Worth (PNW) statements must also be submitted
  - Requires each Unified Certification Program to recertify all currently certified DBEs and ACDBEs under the new criteria

US DOT IFR 10.3.25

Reevaluation Process Update

- Due Date
- Number of Applications Received
- Challenges



SBEC Program

SBEC
Background

DFW's SBEC program was adopted in 2022. The intent of the SBEC Program is to provide full and fair opportunities for equal participation by small businesses in DFW concessions contracts through ACDBE-neutral means.

The SBEC Program Policy seeks to foster participation by small business concessionaires (SBECs) at DFW by increasing the opportunities for such firms to perform as prime or joint venture concessionaires.



SBEC Program Requirements Key Points - SBEC Only

Local Program

Small Business Enterprise Concession (SBEC)

- Business size based on SBA size standards
- Personal net worth threshold same as ACDBE
- No Local Preference but must be certified in Texas
- Gross receipts averaged over three (3) years
- Sustained business activity in the NAICS code described in the certification application for a minimum of six (6) months prior to the date of application
- Certification expires and requires renewal every two (2) years

SBEC Only

- No Concessions specific goal Must be 100% SBEC.
- No local geographical preference.
- Direct negotiation or competitive among other SBECs.

Additional Key Points - SBEC Only:



SBECs can only joint venture with SBECs.



No GFEs for SBEC only proposals.



Commodity codes must be relevant to concession agreement.

SBEC Program Requirements and Key Points - SBEC Goal Specific

Local Program

Small Business Enterprise Concession (SBEC)

- Business size based on SBA size standards
- Personal net worth threshold same as ACDBE
- No Local Preference but must be certified in Texas
- Gross receipts averaged over three (3) years
- Sustained business activity in the NAICS code described in the certification application for a minimum of six (6) months prior to the date of application
- Certification expires and requires renewal every two (2) years

SBEC Goal Specific

- Goal specific for each location/package.
- No local geographical preference.
- SBEC self-performance counts toward goal.

Additional Key Points - SBEC Goal Specific:



Can joint venture with non-SBECs.



GFEs allowed for SBEC Goal Specific proposals; however, must meet GFE criteria and supporting documentation. Documentation due at the time of proposal.



Commodity codes must be relevant to scope of work.

BDD FLIGHT DECK

FREQUENTLY ASKED QUESTIONS





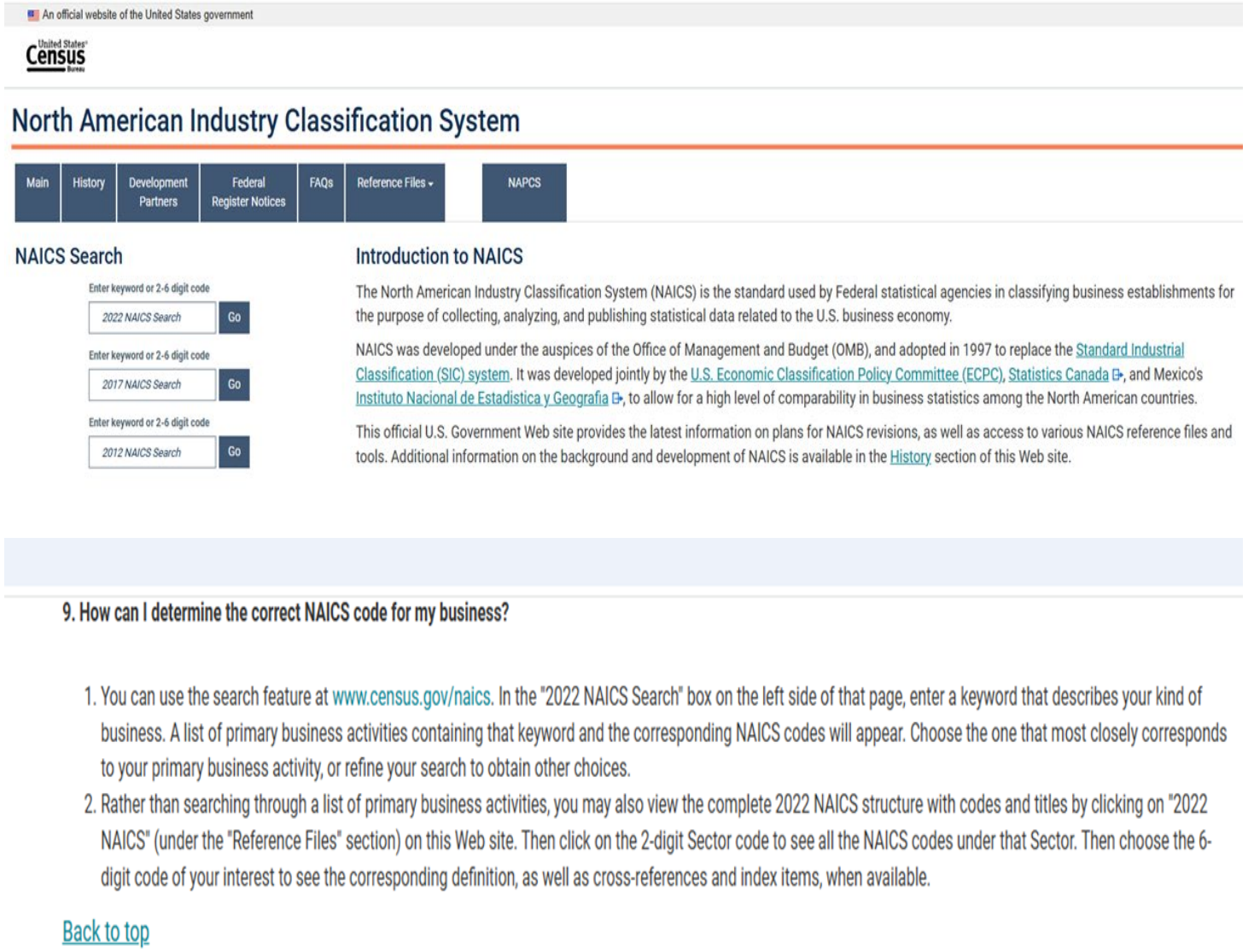
Frequently Asked Question

My company has the opportunity to participate in potential proposals as an SBEC certified firm and I want to ensure I have the appropriate NAICS codes. Could you confirm what your required NAICS codes are?

The Business Development Department does not communicate required NAICS codes in the Concessions proposal opportunities. However, the federal regulations that governs the program does require SBECs to be certified in concession agreement. For example, an SBEC participant in a retail joint venture must be certified as an SBEC retail operator.

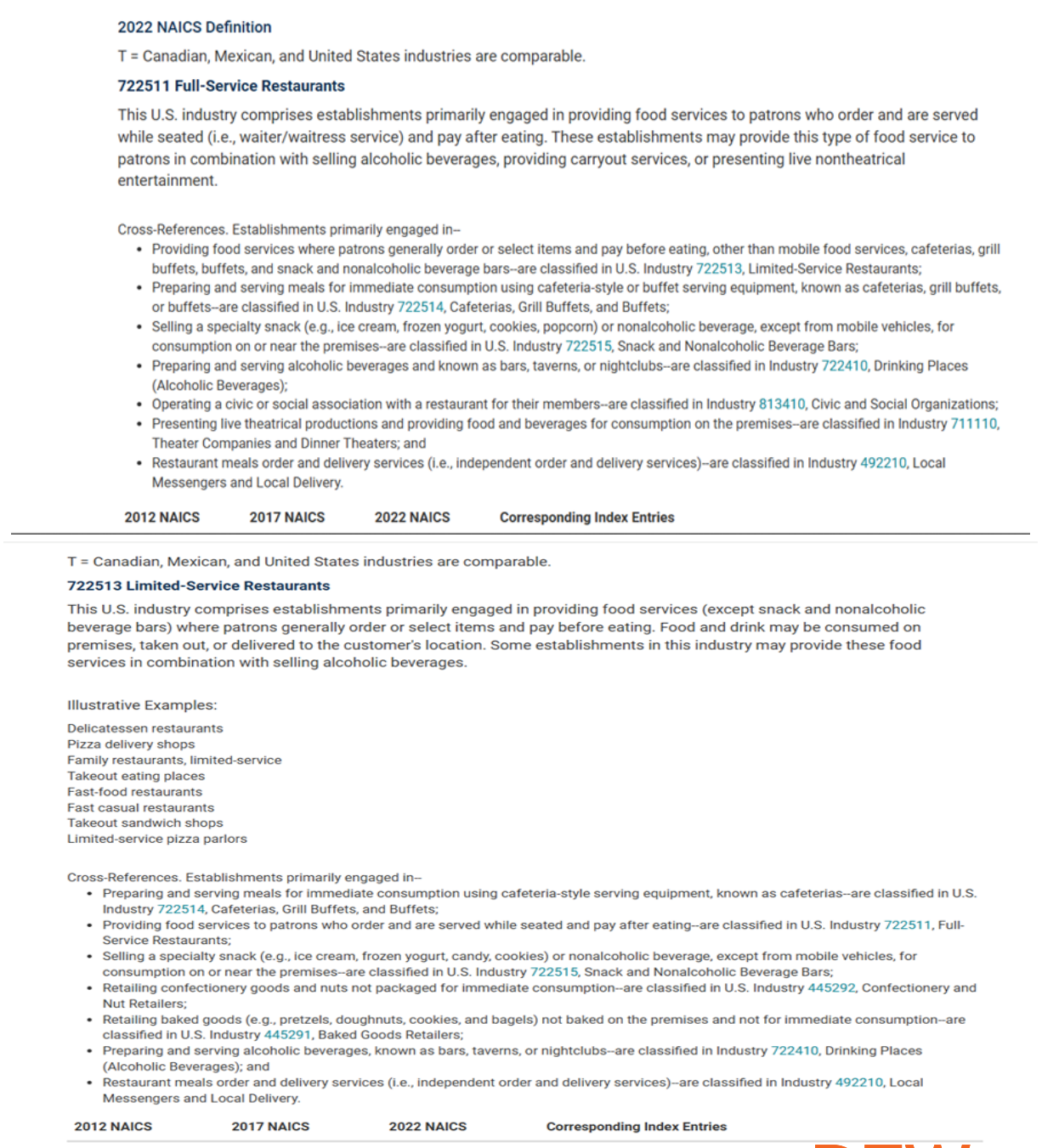
North American Industry Classification System

- Standard used by Federal statistical agencies in classifying business establishments.
- An establishment is generally a single physical location where business is conducted or where services or industrial operations are performed (E.g., … hotel, airline terminal …).
- You can use the search feature at www.census.gov/naics and enter a key word that describes your kind of business.



North American Industry Classification System – NAICS Code Lookup Examples

- NAICS code 722511 Full-Service Restaurants cites an establishment providing food services to patrons who order and are served while seated (I.e., waiter/waitress service) and pay after eating.
- In comparison, NAICS code 722513 Limited-Service Restaurants provides illustrative examples such as Fast-food restaurants and Takeout sandwich shops.
- The Cross-Reference section for each provides the specific NAICS codes that refer to other restaurant types where there is a NAICS code specific to that type of establishment (E.g., 722515 - Snack and Nonalcoholic Beverage Bars, and 722410 - Drinking Places (Alcoholic Beverages).



2022 NAICS Definition

T = Canadian, Mexican, and United States industries are comparable.

722511 Full-Service Restaurants

This U.S. industry comprises establishments primarily engaged in providing food services to patrons who order and are served while seated (i.e., waiter/waitress service) and pay after eating. These establishments may provide this type of food service to patrons in combination with selling alcoholic beverages, providing carryout services, or presenting live nontheatrical entertainment.

Cross-References. Establishments primarily engaged in--

- Providing food services where patrons generally order or select items and pay before eating, other than mobile food services, cafeterias, grill buffets, buffets, and snack and nonalcoholic beverage bars--are classified in U.S. Industry 722513, Limited-Service Restaurants;
- Preparing and serving meals for immediate consumption using cafeteria-style or buffet serving equipment, known as cafeterias, grill buffets, or buffets--are classified in U.S. Industry 722514, Cafeterias, Grill Buffets, and Buffets;
- Selling a specialty snack (e.g., ice cream, frozen yogurt, cookies, popcorn) or nonalcoholic beverage, except from mobile vehicles, for consumption on or near the premises--are classified in U.S. Industry 722515, Snack and Nonalcoholic Beverage Bars;
- Preparing and serving alcoholic beverages and known as bars, taverns, or nightclubs--are classified in Industry 722410, Drinking Places (Alcoholic Beverages);
- Operating a civic or social association with a restaurant for their members--are classified in Industry 813410, Civic and Social Organizations;
- Presenting live theatrical productions and providing food and beverages for consumption on the premises--are classified in Industry 711110, Theater Companies and Dinner Theaters; and
- Restaurant meals order and delivery services (i.e., independent order and delivery services)--are classified in Industry 492210, Local Messengers and Local Delivery.

2012 NAICS	2017 NAICS	2022 NAICS	Corresponding Index Entries

T = Canadian, Mexican, and United States industries are comparable.

722513 Limited-Service Restaurants

This U.S. industry comprises establishments primarily engaged in providing food services (except snack and nonalcoholic beverage bars) where patrons generally order or select items and pay before eating. Food and drink may be consumed on premises, taken out, or delivered to the customer's location. Some establishments in this industry may provide these food services in combination with selling alcoholic beverages.

Illustrative Examples:

Delicatessen restaurants
Pizza delivery shops
Family restaurants, limited-service
Takeout eating places
Fast-food restaurants
Fast casual restaurants
Takeout sandwich shops
Limited-service pizza parlors

Cross-References. Establishments primarily engaged in--

- Preparing and serving meals for immediate consumption using cafeteria-style serving equipment, known as cafeterias--are classified in U.S. Industry 722514, Cafeterias, Grill Buffets, and Buffets;
- Providing food services to patrons who order and are served while seated and pay after eating--are classified in U.S. Industry 722511, Full-Service Restaurants;
- Selling a specialty snack (e.g., ice cream, frozen yogurt, candy, cookies) or nonalcoholic beverage, except from mobile vehicles, for consumption on or near the premises--are classified in U.S. Industry 722515, Snack and Nonalcoholic Beverage Bars;
- Retailing confectionery goods and nuts not packaged for immediate consumption--are classified in U.S. Industry 445292, Confectionery and Nut Retailers;
- Retailing baked goods (e.g., pretzels, doughnuts, cookies, and bagels) not baked on the premises and not for immediate consumption--are classified in U.S. Industry 445291, Baked Goods Retailers;
- Preparing and serving alcoholic beverages, known as bars, taverns, or nightclubs--are classified in Industry 722410, Drinking Places (Alcoholic Beverages); and
- Restaurant meals order and delivery services (i.e., independent order and delivery services)--are classified in Industry 492210, Local Messengers and Local Delivery.

2012 NAICS	2017 NAICS	2022 NAICS	Corresponding Index Entries



Frequently Asked Question

I am currently ACDBE certified through the Texas Unified Certification Program(TUCP), with Texas as my home state, but if I am interested in becoming SBEC certified should I apply under TUCP or NCTRA instead?

NCTRCA is the only approved certifying entity for the SBEC certification.

Approved Certifying Entity - SBEC

NORTH CENTRAL TEXAS REGIONAL CERTIFICATION AGENCY

2261 Brookhollow Plaza Drive, Suite 300
Arlington, TX 76006
(817) 640-0606 or www.nctrca.org
(Processing timeframe: 60 – 90)



Frequently Asked Question

How do we partner with other companies?

The Business Development Department provides networking opportunities throughout the year for firms to connect whether through the SOAR Conference, Capacity Building Program Series, collaboration with the Concessions Department and other resources.

Identifying Prospective SBEC and SBE+ Partners

- Minority Chambers
- Advocacy Organizations
- Certification Agencies

DFW's Directory is not a 'certification database

It is a listing of certified firms that have expressed an interest in doing business with DFW or are currently doing business with DFW



DFW Online Directory
dfwairport.com - Compliance Reporting System



Frequently Asked Question

What kind of net worth or financial backing requirements do you have for new vendors?

Per the FAA, at least 15% of the capital required should be provided by the SBEC.

Reminders



You're Ready to Submit a Proposal …

DO

- Follow the proposal instructions
- Ask questions during the approved period
- Submit and sign all required forms and certification certificates
- Have Commodity Codes (NAICS Codes) relevant to scope of work and concept
- If applicable, submit unsigned draft agreements (I.e., joint venture, management, sublease, franchise) at the time of proposal

DO NOT

- Submit certification certificates from other programs
- Submit pending certification letters
- Submit forms as not applicable

Additional Resources and Outreach





Additional Resources

http://www.dfwairport.com/bdd

- DFW SBEC Program Manual
- DFW SBE Program Manual
- Joint Venture Agreement Template

http://www.faa.gov/

- Joint Venture Guidance
- Federal Regulations



DFW

Capacity Building
2026 PROGRAM SERIES

Your passport to business connections at DFW!

APRIL
Doing Business with DFW
• Friday, April 10, 2026, 10:00-11:30AM

MAY
Procurement Methods – Understanding Bids and Proposals
• Friday, May 1, 2026, 10:00-11:30AM

JUNE
SBE Program Compliance Requirements
• Friday, June 5, 2026, 10:00-11:30AM

JULY
Procurement Buying Plan – Forecasting Upcoming Opportunities
• Friday, July 10, 2026, 10:00-11:30AM

AUGUST
Prime-Sub Connections – Building Effective Partnerships
• Friday, August 14, 2026, 10:00-11:30AM

BUSINESS DEVELOPMENT DEPARTMENT | bdd@dfwairport.com • (972) 973 5500 • Visit dfwairport.com/bdd to register!

2026 CAPACITY BUILDING

Educational Series

- Designed to provide business skills training and guidance on doing business with DFW Airport.
- Sessions tailored specifically to doing business with DFW in the business areas of construction, concessions and goods and services.
- No cost to attend!

[DFW Airport Capacity Building Program Series | DFW International Airport]

DFW

DFW Concessions



Jennifer Simkins

Assistant Vice President
Concessions

Concessions by the **numbers**

120+ restaurants

80+ retail locations

20+ amenities services



Concessions

WHAT WE DO

Every day.

TRANSFORMED.

Position DFW as the Airport of choice with opportunities that boost revenue and create customer-centric spaces that reflect and uplift the community.

GENERATE

NON-AERONAUTICAL REVENUE

$1.3B Gross Receipts

AIRPORT OF CHOICE



280 LEASED Locations

46 New Leases

311, 000 SQFT Concession Space (+80% by 2030)

3 New Lounges

25 RAC Projects

37 Midterm Refurbs



54 Locations opportunities

CREATE OPPORTUNITY

CUSTOMER SATISFACTION

Mastering the Basics

280 Locations

3,000 Inspections

4,500 Mystery Shops

Enjoy, Relax, Remember

We're not just filling spaces - we're designing **experiences** across multiple terminals that align with each passenger profile, each terminal's unique travel patterns, and revenue targets. The strategy is data-led, customer-focused, and built to balance **operational ease** and **revenue reliability** with **memorable experiences** that differentiate DFW.



DFW Airport Operational Requirements

Hours of Operation

- Open from first flight until last flight departure

Refurbishment

- Midpoint of term of lease

Pricing Policy

- Product may not exceed 15% over street pricing

Security & Safety

- TSA regulations compliance

Additional

- Mystery Shopper Program
- Customer Service and Operational Standards Manual
- Service Level Agreements (Compliance standards)



Operational Differences



Traditional "Streetside" Operations

- Build-out
- Rent
- Employees
- Insurance

Airport Operations

- Build-out costs 20% - 40% higher, takes longer
- Construction Requirements unique to airport
- Off-hours operations (365 days/yr)
- TSA security requirements (Badging)
- Product logistics/distribution
- Airline gate utilization & Flight Banking
- Annual surety bonds/deposits
- Rent Requirements: MAG plus Percentage Rent
- Storage rent psf
- Operations & Maintenance Fees (O&M)









New Concession Locations









Upcoming Opportunities



OUR TERMINALS ARE **GROWING**



Terminal A

140K sq. ft. | **10** gates

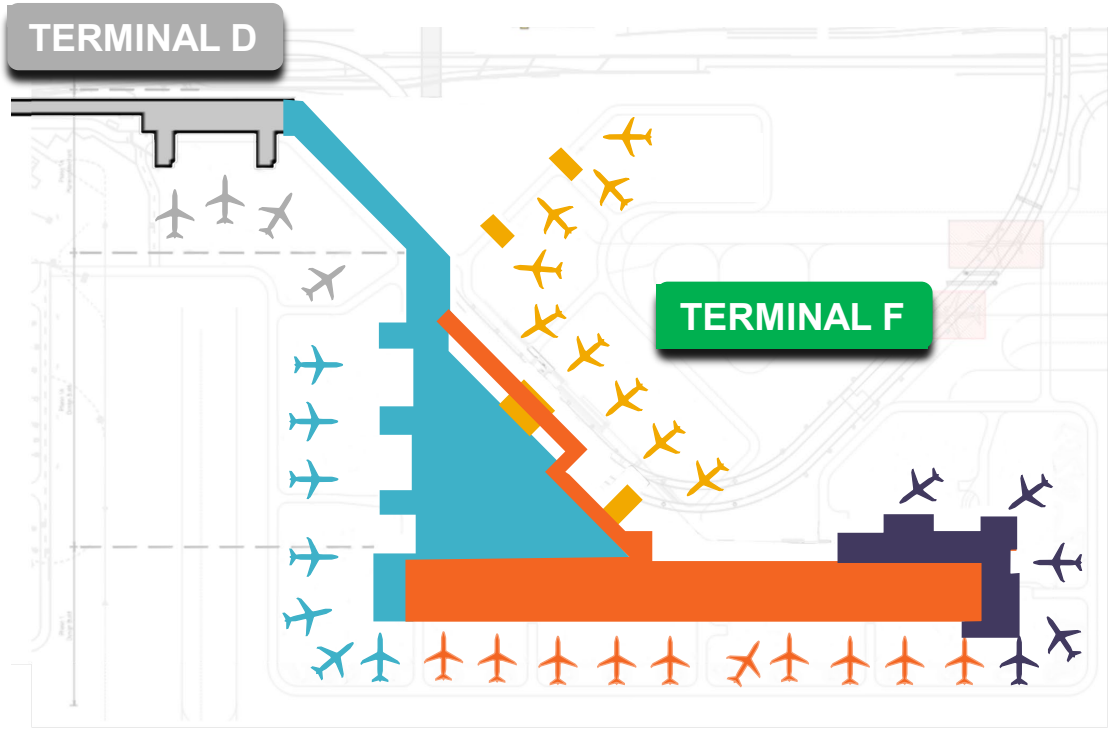


Terminal C

3 phases | **1.1M** sq. ft. | **32** gates

Terminal F Phasing





$4 billion investment | **International** Capabilities |

RFP COMPLETE
Open May 2027
10 Gates

RFP 2026
5 Gates
(15 Total)

RFP 2027
7 Gates
(22 Total)

RFP 2030
9 Gates
(31 Total)

***Dates subject to change.**

5-YEAR LOOK AHEAD

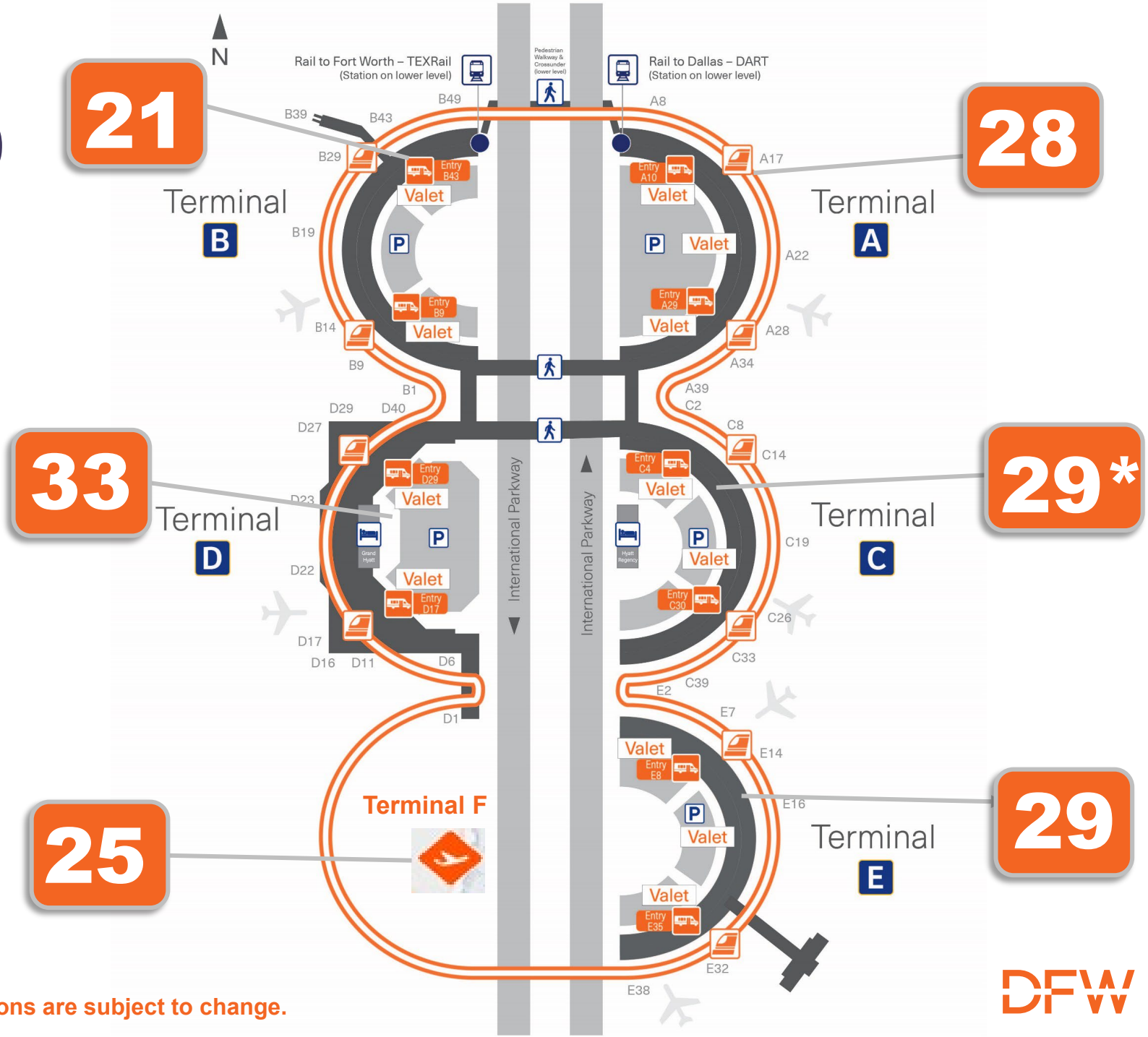
FALL 2026
23

2027
23

2028
20

2029
25

2030
21



*Dates and locations are subject to change.

RFP MENU

TERMINAL A 5

	SF
WELLNESS/SELF CARE	900
ELECTRONICS	1,406
GOURMET BURGER	1,875
CANDY	550
FULL SERVICE DINE	2,999



TERMINAL B 4

	SF
COFFEE-NATIONAL	436
TRAVEL ESSENTIAL	216
SNACK	718
FLEXIBLE RETAIL	777





TERMINAL C 5

	SF
SWEET TREAT	682
FROZEN TREAT	500
ELECTRONICS	384
QUICK SERVE	1,050
TEXAS BBQ	2,067



TERMINAL E 4

	SF
TRAVEL ESSENTIAL	1,492
FF BURGER	3,618
FF WITH BAR	3,591
CANDY	910



TERMINAL F 5

	SF
AMERICAN BAR & GRILL	2,659
NAP CENTER	4,089
PIZZA & PASTA	1,191
ENTERTAINMENT	2,680
FLEX RETAIL (NOVELTY)	822

Subject to change.

Coming This Fall...

DFW

RFI – F&B Pad Site

Release Summer 2026

Pad Site A: 1.08 acres
Pad Site E: 1.25 acres

An opportunity to anchor this growing mixed-use environment with a **full-service restaurant** that complements and supports the continued expansion of Southgate Plaza.

Demographics (Source: ESRI)		
5 Mile Radius	2020	2025
Population	230,872	235,079
Households	80,613	99,013
Avg. Income	$66,400	$74,893
Passengers	6,309,451	6,379,291



*Subject to change.

Contracting Opportunities

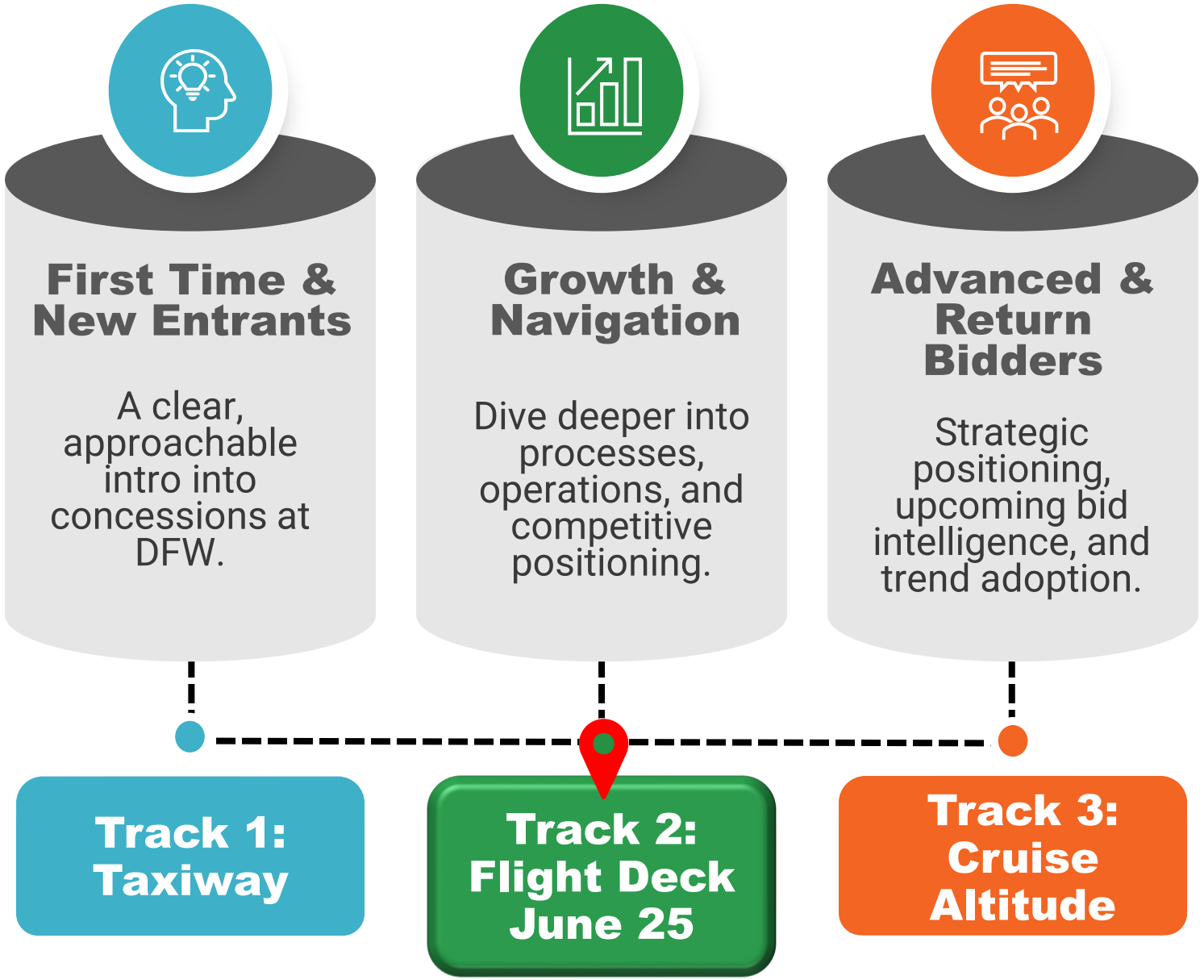
- Goods & Services
- Professional Services
- High-tech Procurements
- Construction Services
- Concessions

Resources for Doing Business at DFW

Scan the QR code to register your business with concessions. You will receive updates on upcoming events and opportunities.



Outreach Flight Path Tracks



CONTACT INFORMATION

PRIOR

TO RFP RELEASE

CONCESSIONS TEAM

JENNIFER SIMKINS
Assistant Vice President
jsimkins@dfwairport.com

CRISTEN MOSLEY
Concessions Manager
cmosley@dfwairport.com



Questions



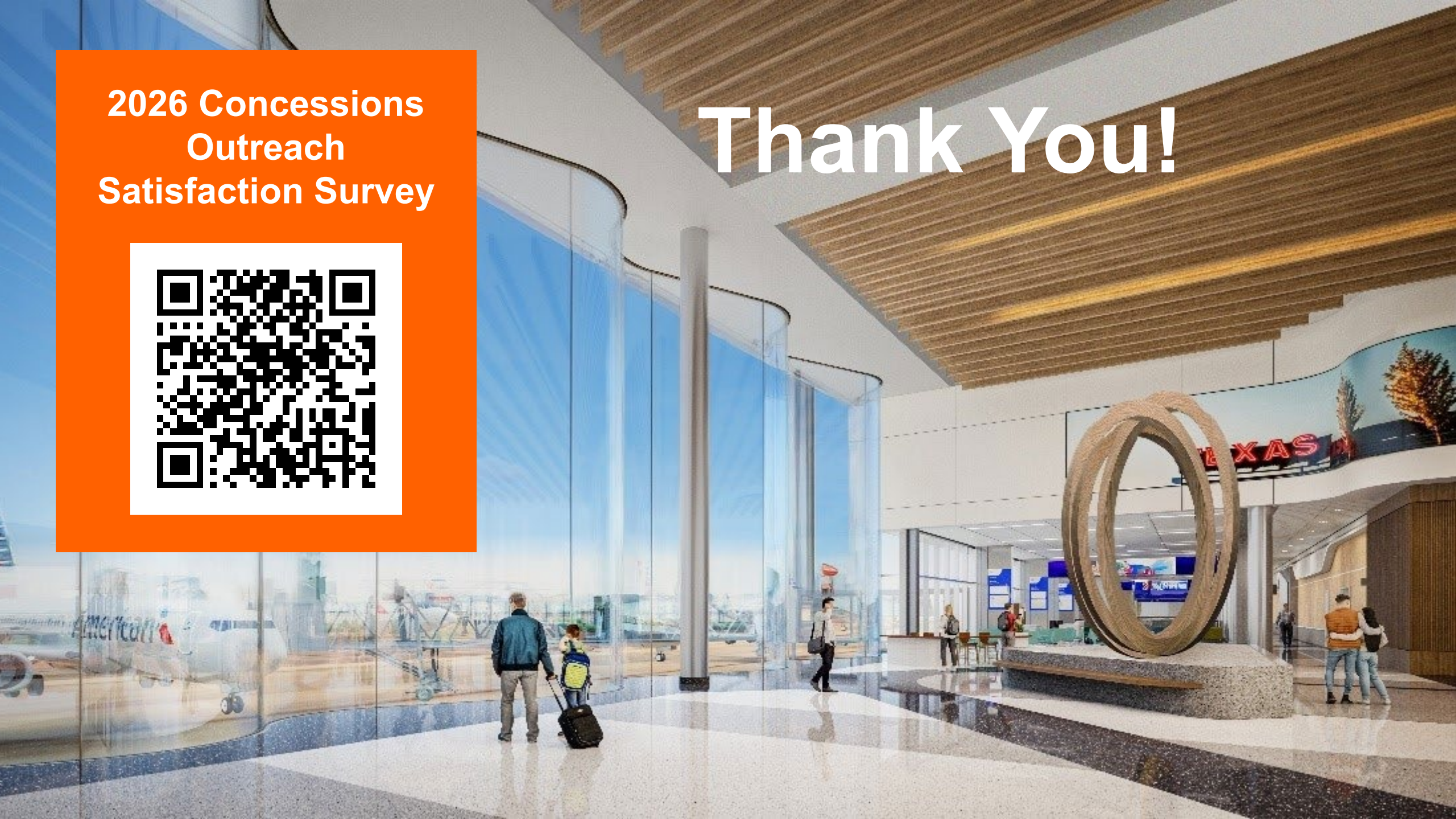
DFW Forward

Closing Remarks



Thank You!

2026 Concessions Outreach Satisfaction Survey



DFW Concessions Outreach



Dallas Fort Worth International Airport

June 3, 2025