

2026 AVIATION BUSINESS SUMMIT

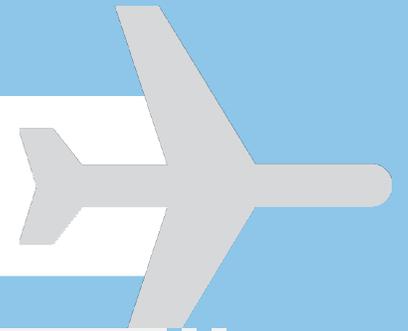
PHX CONCESSION OPPORTUNITIES

Janet Lee
Concessions Program Manager
March 10, 2026



PHX DVT BYR

Agenda



1 Phoenix Sky Harbor Overview

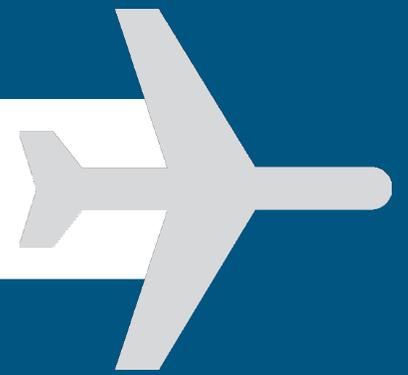
2 Upcoming Concession Opportunities

3 On the Horizon Opportunities

4 Stay Informed

5 Questions & Answers

PHX Airport System



The Aviation Department operates:

- Phoenix Sky Harbor International Airport
- Phoenix Deer Valley Airport
- Phoenix Goodyear Airport



PHX

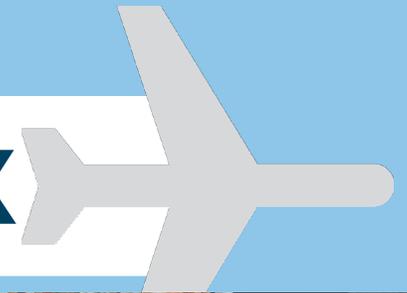


DVT



GYR

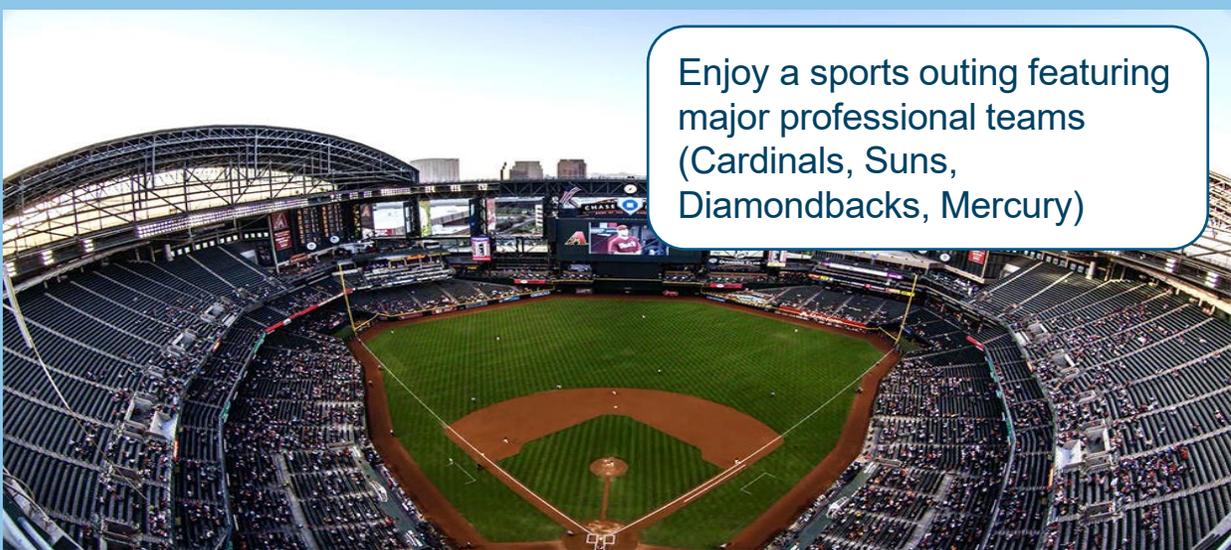
Leisure, Entertainment, Tourism via PHX



Explore desert landscapes, deep canyons and geological formations, headlined by the Grand Canyon



Taste your way through the many culinary offerings that make Phoenix a destination for food lovers

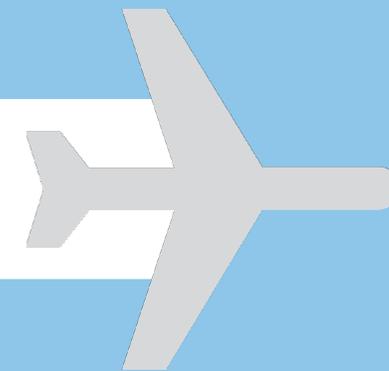


Enjoy a sports outing featuring major professional teams (Cardinals, Suns, Diamondbacks, Mercury)



Relax in first class accommodations with golf courses and luxury spa and health facilities

PHX SKY HARBOR – AT A GLANCE



Two Major Terminals

- 47,000+ jobs at the Airport
- PHX ranked 3rd in passenger satisfaction among mega airports



Home for 24 Airlines

- 149 destinations (US & International)
- One of the busiest 3-runway airports in the world



Award Winning Airport

- 13 PHX restaurants featured in *PHOENIX magazine's* 2025 Best of the Valley
- PHX recognized among the top 10 U.S. airports in the 2025 USA Today 10 Best Readers' Choice Awards in four categories

Over 50 Million Passengers in 2025

- Avg. 140,000+ passengers daily
- Avg. 1,300+ flight operations daily



Concessions Concepts in Terminal 4 (T4)



Source: Phoenix Sky Harbor International Airport

Concession Concepts in Terminal 3 (T3)

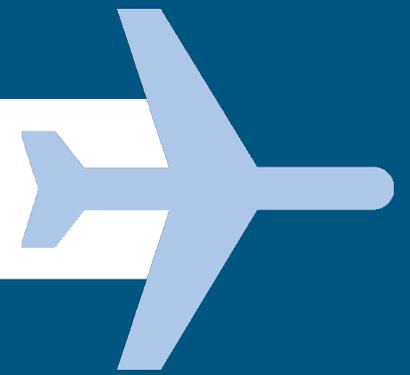


Source: Phoenix Sky Harbor International Airport

Upcoming Concession Opportunities

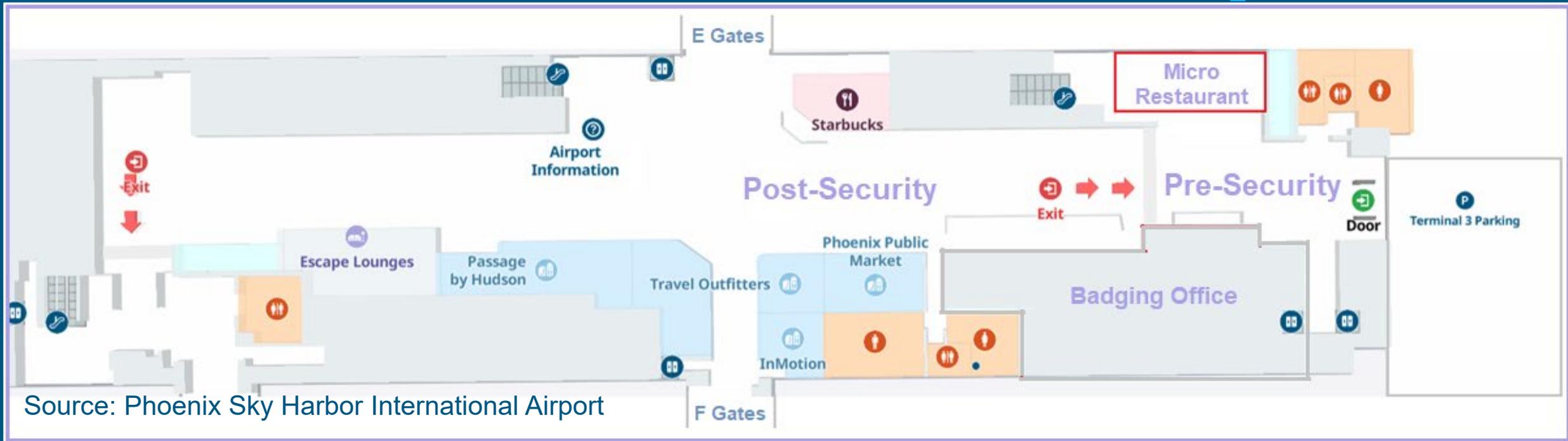
- ❑ T3 Micro Restaurant and Kiosk
- ❑ T3N2 F&B Packages
- ❑ T3N2 Retail Packages
- ❑ Airport Advertising Program

Micro Restaurant Location



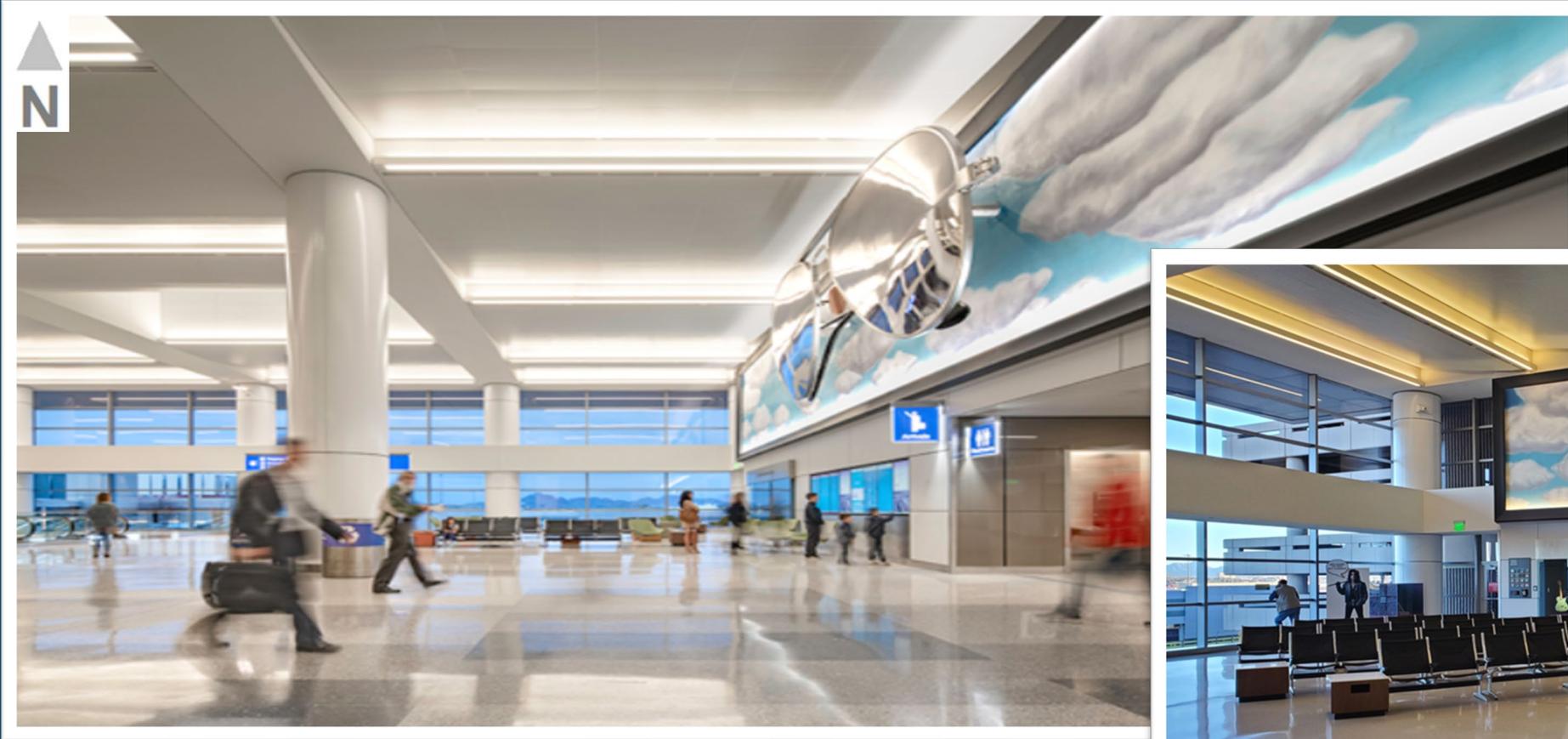
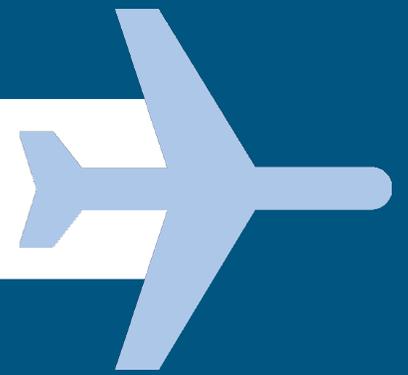
Terminal 3 Food & Beverage Concession Small Business Opportunity

Terminal 3 Level 4

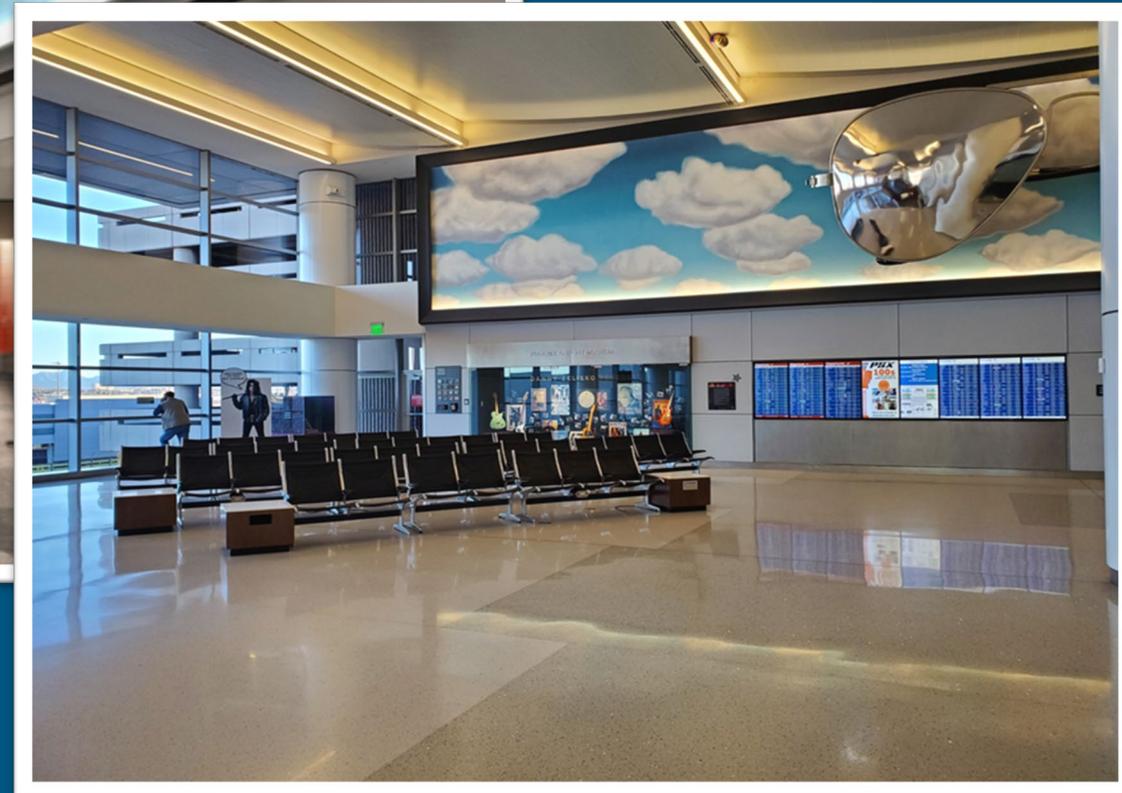


Source: Phoenix Sky Harbor International Airport

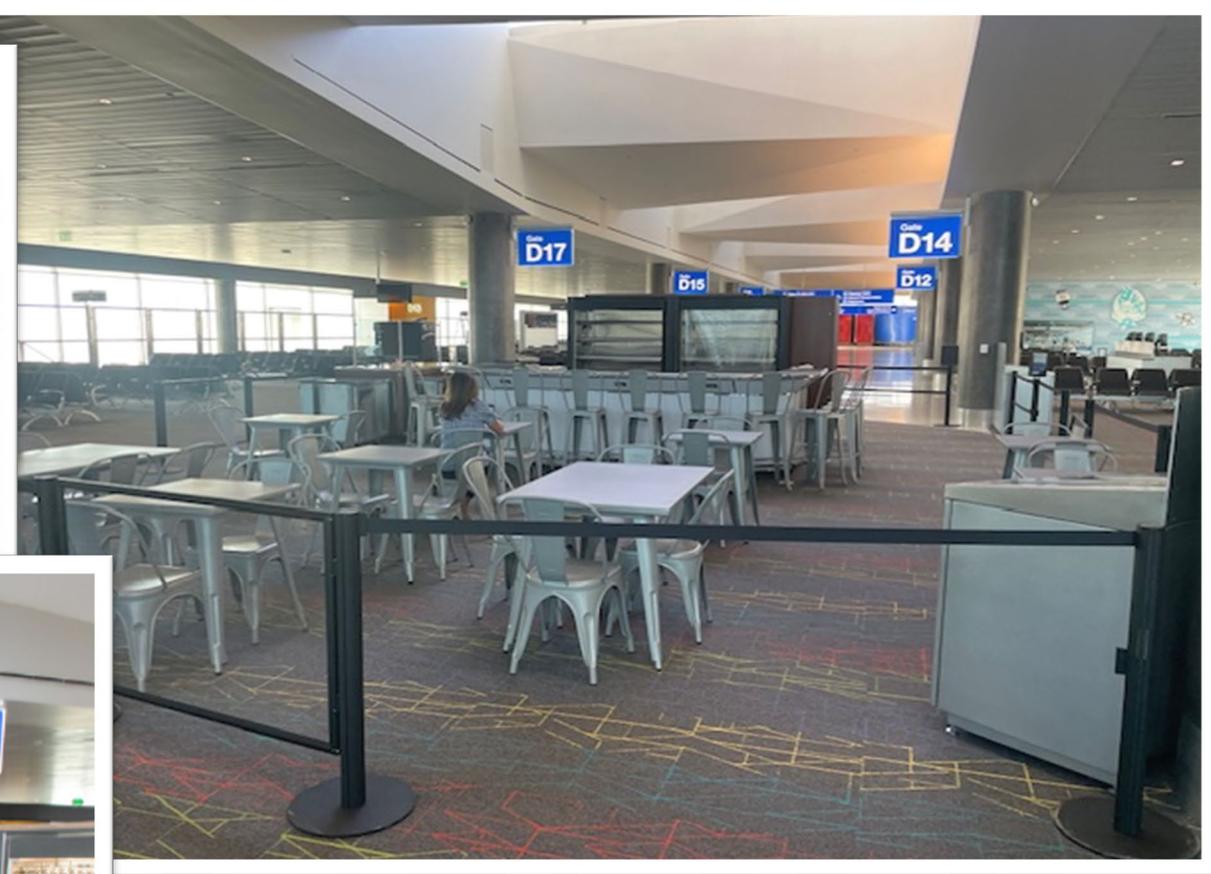
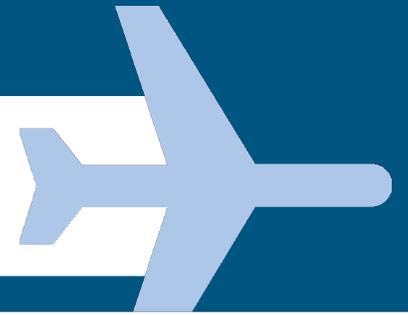
Micro Restaurant Location



Terminal 3

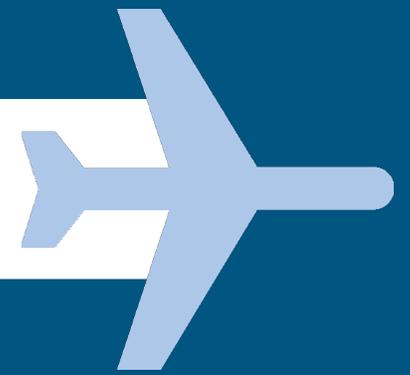


Micro Restaurant Equipment



Source: Phoenix Sky Harbor International Airport

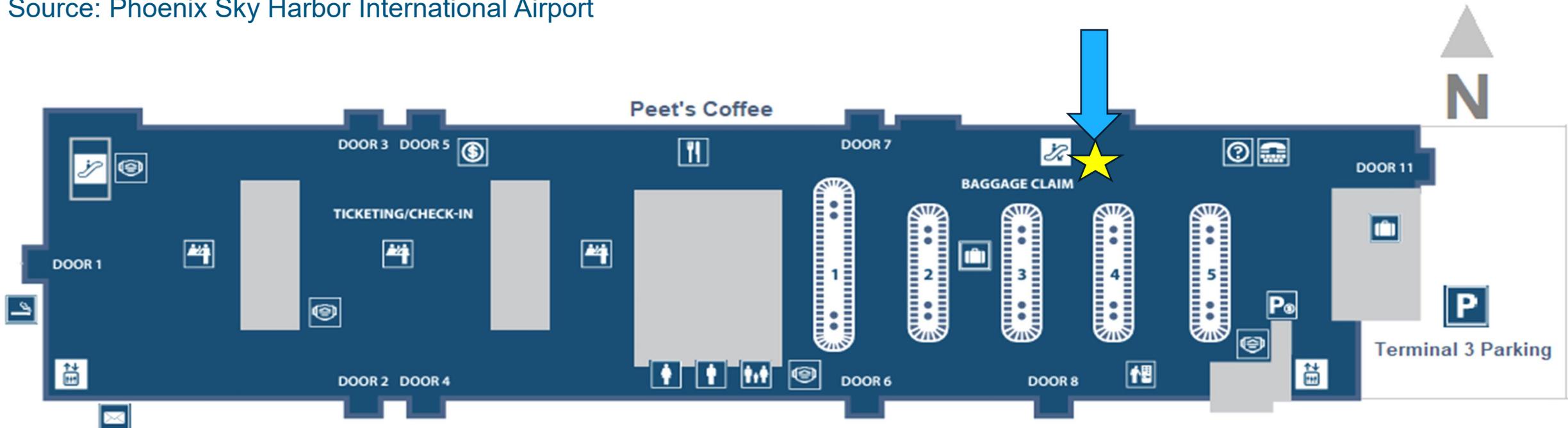
Kiosk Location



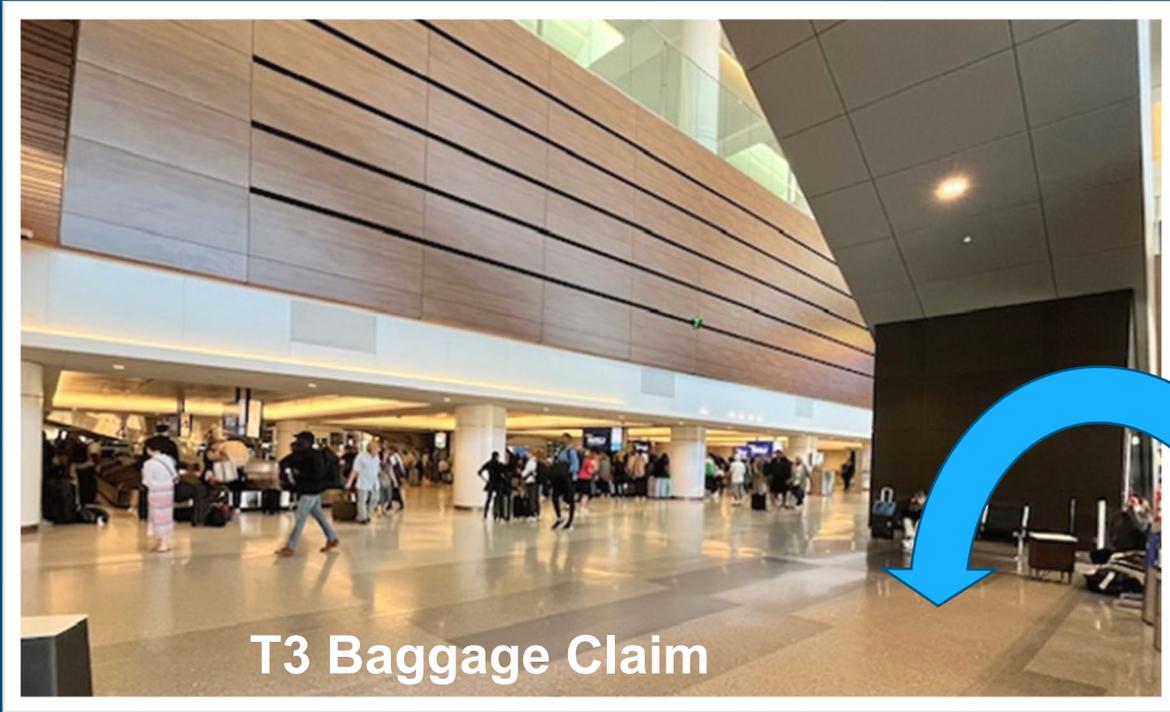
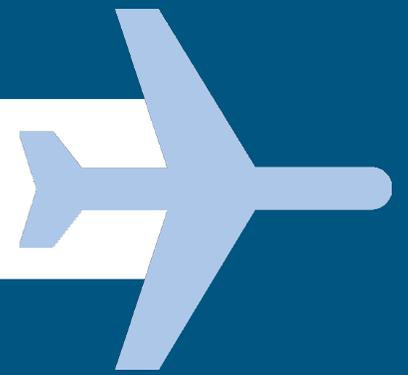
Terminal 3 Food & Beverage Concession Small Business Opportunity

Kiosk Location: Terminal 3 Level 1 – Baggage Claim

Source: Phoenix Sky Harbor International Airport



Kiosk Equipment



Source: Phoenix Sky Harbor International Airport

Considered Lease Terms



Initial Term: Three (3) Year Term



Renewal Option: Two One-Year Renewal Options



Revenue Structure: Percentage of Gross Sales (No MAG)

Upcoming Concession Opportunities

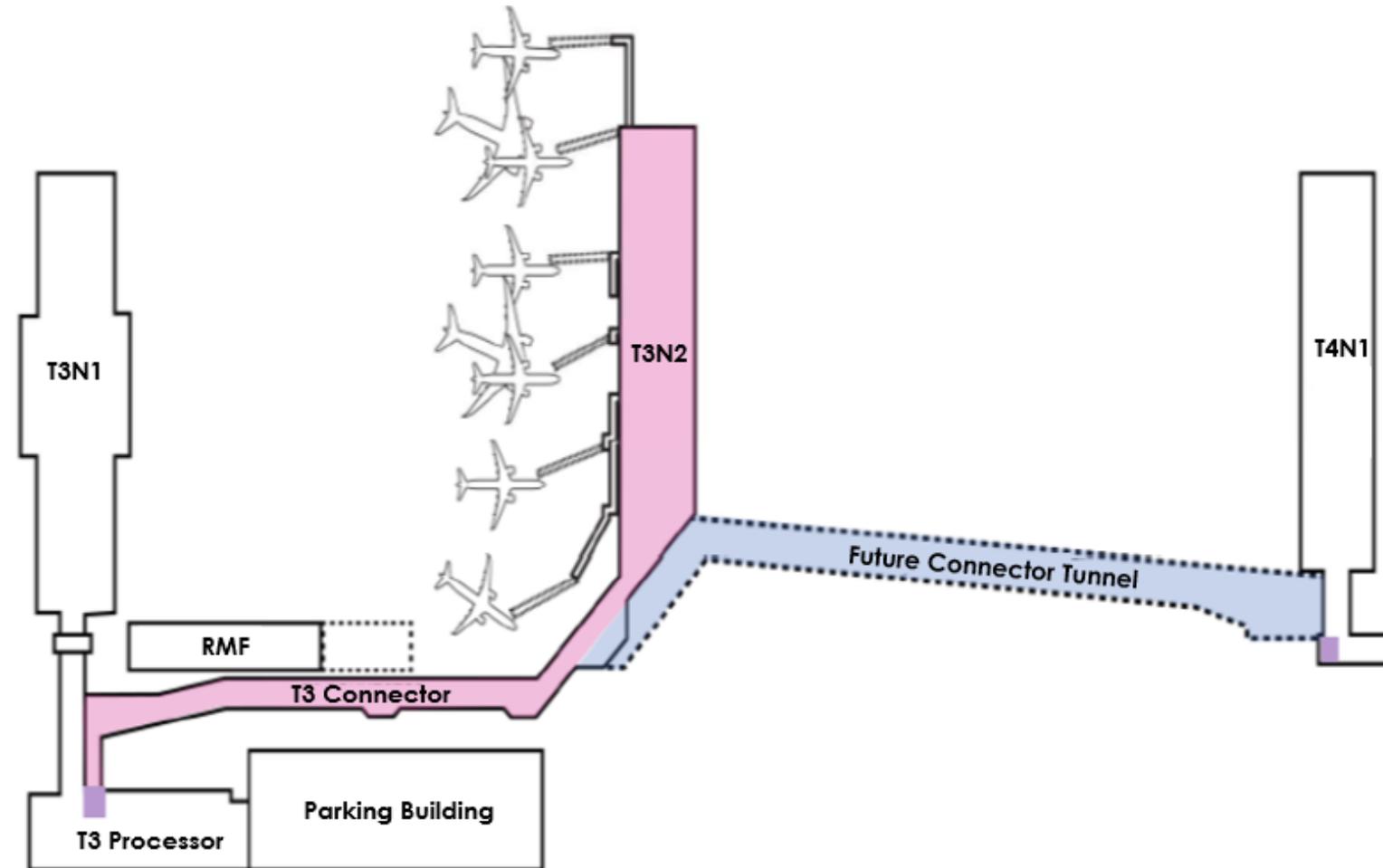
- T3 Micro Restaurant and Kiosk
- T3N2 F&B Packages
- T3N2 Retail Packages
- Airport Advertising Program

T3N2 Concourse Concessions Programming Objectives

- ✓ Meet the need for 1.5M passenger activity



Preliminary Concept Rendering

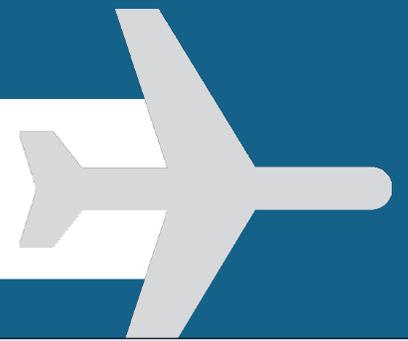


T3N2 Concourse Project Overview

- ✈️ **Six Gate Concourse**
- ✈️ **Future Terminal Connector**

Source: Phoenix Sky Harbor International Airport

T3N2 Concession Opportunities



Food & Beverage Packages

- ✈ One full-service restaurant with bar (N2-FB4)
- ✈ Two quick-serve restaurants and café bar (N2-FB1 & N2-FB2)
- ✈ One coffee café designated for a small business operator (N2-F3)

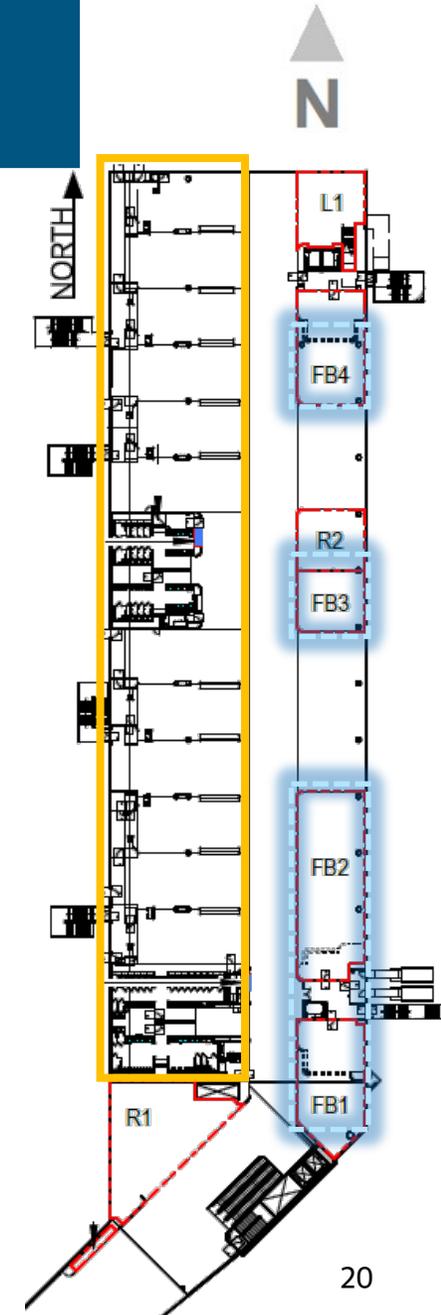


Retail Packages

- ✈ One retail convenience, news, and gift store (N2-R1)
- ✈ One specialty retail store (N2-R2)

Food and Beverage Packages

- ❑ One (1) Full-Service Restaurant with Bar (N2-FB4);
- ❑ One (1) Coffee Café Small Business Only (N2-FB3);
- ❑ Two (2) Quick-Serve Restaurants and Café Bar (N2-FB1 & FB2)



*Preliminary Concepts are subject to change

Source: Phoenix Sky Harbor International Airport

Food and Beverage Categories

One Full-Service Restaurant with Bar (N2-FB4)

- ❑ Table service to customers and served by waitstaff. Restaurant will also have a bar for customers to order alcoholic and non-alcoholic beverages (with the proper liquor licenses).



Image Source: Phoenix Sky Harbor International Airport

Examples of F&B Categories



Image Source: Phoenix Sky Harbor International Airport

Food and Beverage Categories

One Coffee Café Small Business Opportunity (N2-FB3)

- ❑ Offers an array of coffee and tea selections and the menu items should include options for breakfast and lunch, including various bakery items and snacks.

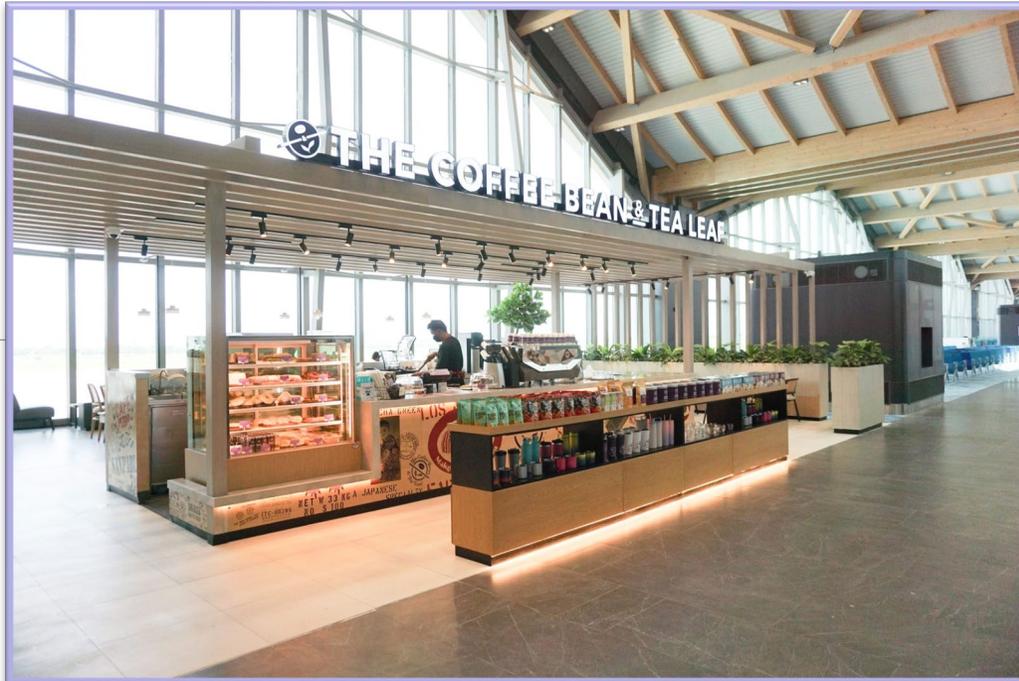


Image Source: Clark International Airport website



Concept Rendering Source: Master Concession Air 22



Food and Beverage Categories

Two Quick-Serve Restaurants and Café Bar (N2-FB1 and N2-FB2)

- ❑ The **quick-serve** units may offer counter service or self-service so the customer can pick up their order when the order is ready. Typically, these restaurants cater to faster-paced clientele.
- ❑ The **café bar** will offer a full complement of alcoholic beverages in a themed environment. The café bar is expected to offer full or limited food service and serve appetizers, small plates, breakfast items, etc.



Image Source: Phoenix Sky Harbor International Airport

Examples of F&B Categories Only

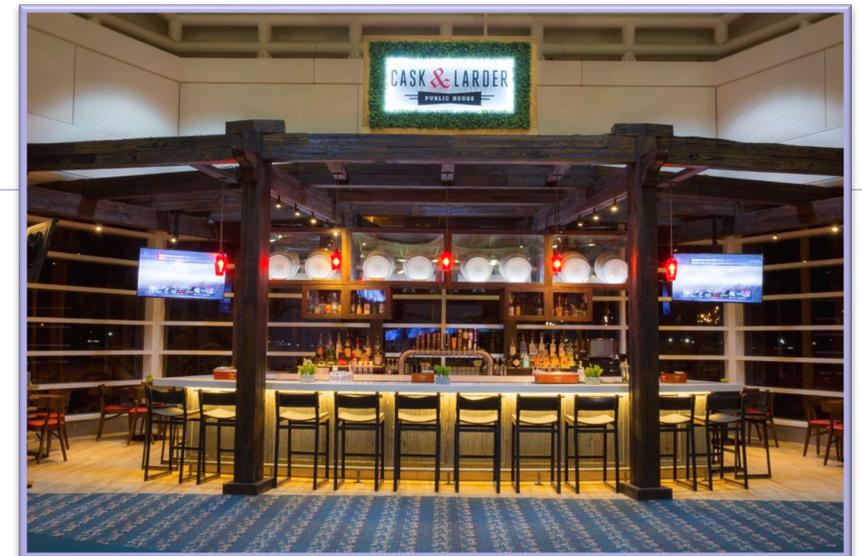


Image Source: MCA-Airports website



F&B Considered Lease Terms



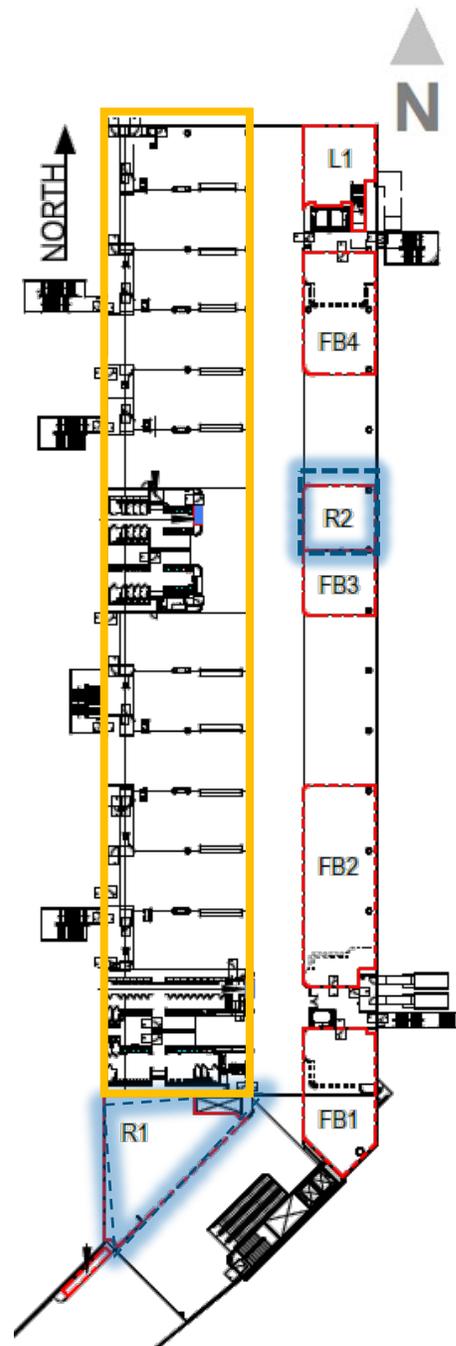
Initial Term: Between 12 – 15 Years



Initial Capital Investment: Minimum Capital Investment will be finalized upon RCS posting



Revenue Structure: Percentage of Gross Sales (No MAG)



Proposed Retail Concessions

- ❑ One (1) News, Gift & Convenience, Store (N2-R1);
- ❑ One (1) Specialty Store (N2-R2)

Retail Concession Categories

One Retail News, Gift, and Convenience Store (N2-R1)

- Offers essential merchandise that passengers can purchase quickly and efficiently with touchless and contactless check-out capabilities.



Image Source: MSY Airport website



Image Source: DFNI Frontier News website

Examples of Retail Categories Only

Retail Concession Categories

One Specialty Retail Store (N2-R2)

- This retail concept is an arrangement curated, branded, or niche store that concentrate on specific product categories such as electronics, beauty, fashion, luxury accessories, or local, high-quality souvenirs.



Image Source: Port of Seattle website



Image Source: Airport Experience News

Examples of Retail Categories Only



Retail Considered Lease Terms



Initial Term: Between 10 – 12 Years



Initial Capital Investment: Minimum Capital Investment will be finalized upon RCS posting



Revenue Structure: Percentage of Gross Sales (No MAG)

Upcoming Concession Opportunities

- T3 Micro Restaurant and Kiosk
- T3N2 F&B Packages
- T3N2 Retail Packages
- Airport Advertising Program

Airport Advertising Opportunity

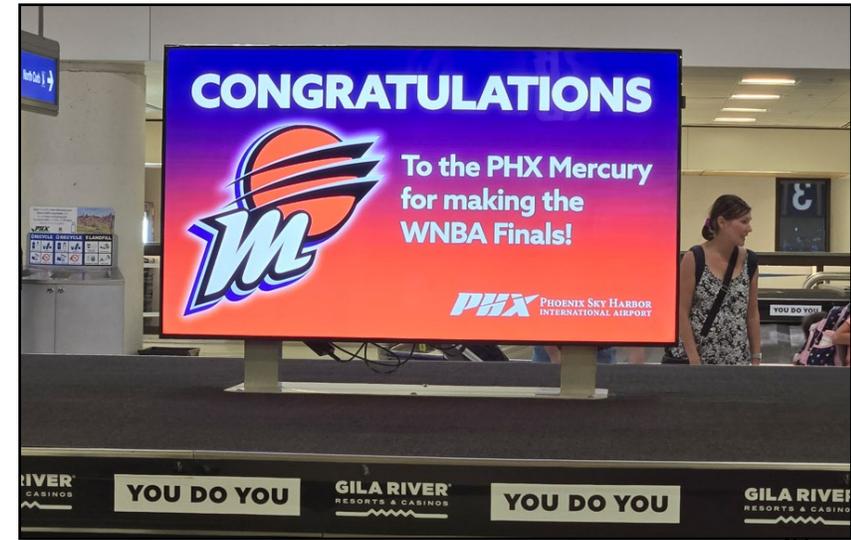
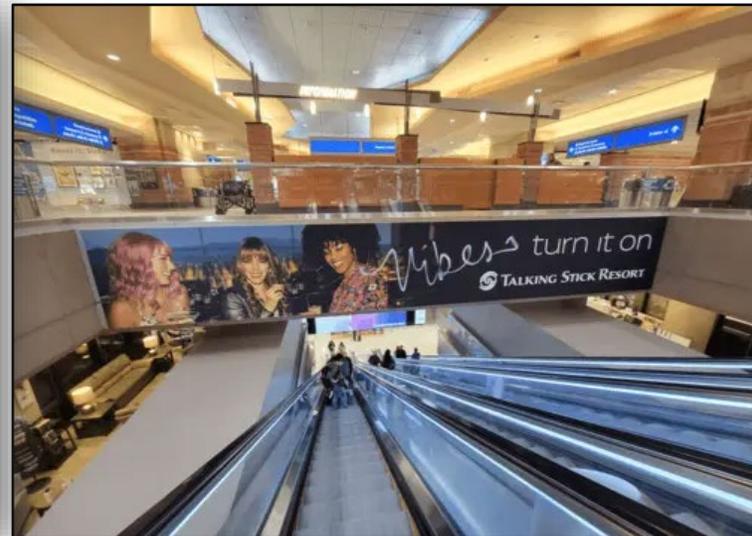


Image Source: Phoenix Sky Harbor International

Advertising Program Goals

- Indoor and outdoor advertising spaces
- Sponsorship opportunities
- Advanced technology and equipment
- Distinctive passenger engagement opportunities
- Enhanced overall passenger experience
- Alignment with industry best practices



Image Source: Passenger Terminal Today website



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Advertising Considered Lease Terms



Initial Term: Seven (7) year term



Renewal Option: One (1) three-year renewal option based on completion of mid-term capital reinvestment



Initial Capital Investment: Based on successful Respondent's proposal



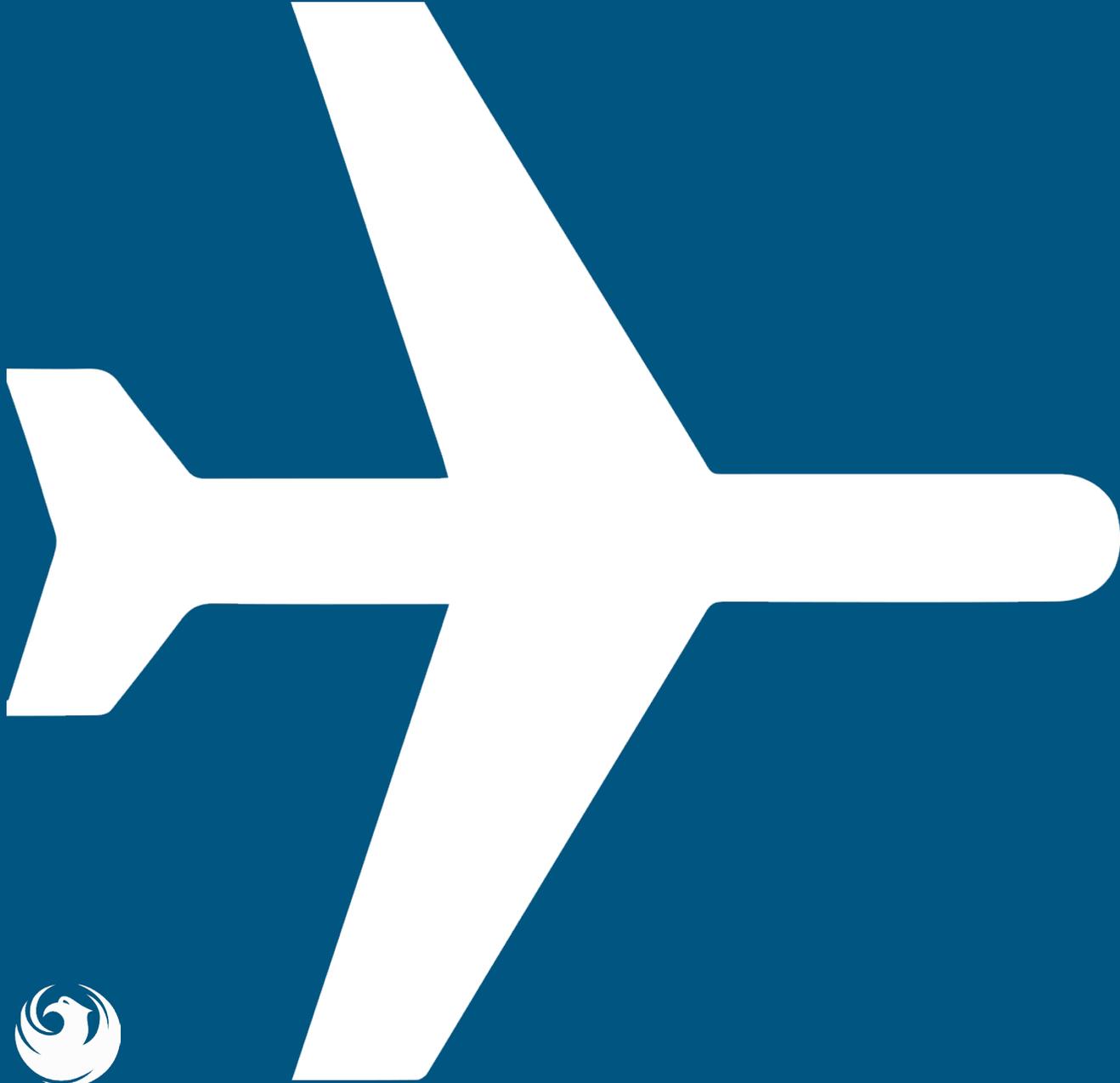
Mid-term Capital Reinvestment: Based on successful Respondent's proposal



Revenue Structure: Specific MAG and percentage rates will be finalized upon RCS publication

ON THE HORIZON OPPORTUNITIES

- T3N2 Airport Lounge**
- Foreign Currency Exchange**
- Network Entertainment
Broadcasting System**
- Automated Retail Vending**



**STAY
INFORMED**



Join our Aviation Department Interest Email List

Instructions

Email: busopps.aviation@phoenix.gov

Include the following information:

- Company Name
- Email address (for notification)
- Identify interested business area(s)
i.e., Retail, Food & Beverage, Ground
Transportation

RESOURCES

Aviation Outreach Events



Aviation Business Website



QUESTIONS



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INTERNATIONAL AIRPORT

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Thank You



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