Concessions Redevelopment Information Session

September 10, 2026

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Tampa International Airport

Agenda

- Introduction
- Airport Overview
- Concessions Program
- Small Business Enterprise Concessionaire (SBEC) Program
- Next Steps
- Networking

Airport Overview

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TAMPA INTERNATIONAL AIRPORT

Annual Passengers

24.8M

Daily Average **67,976**

Highest Traffic Month

March

2,462,255 passengers

Lowest Traffic Month

September

1,712,373 passengers

4 Airsides / 58 Gates

66

Shops and Restaurants

23,000

Approx. Parking Spaces

239,856,759

Pounds of Cargo and Mail

Calendar Year 2025

3 General Aviation Airports

Peter O. Knight, Plant City, Tampa Executive

Calendar Year 2025

Airside D

Opened in 1971
Demolished 2008

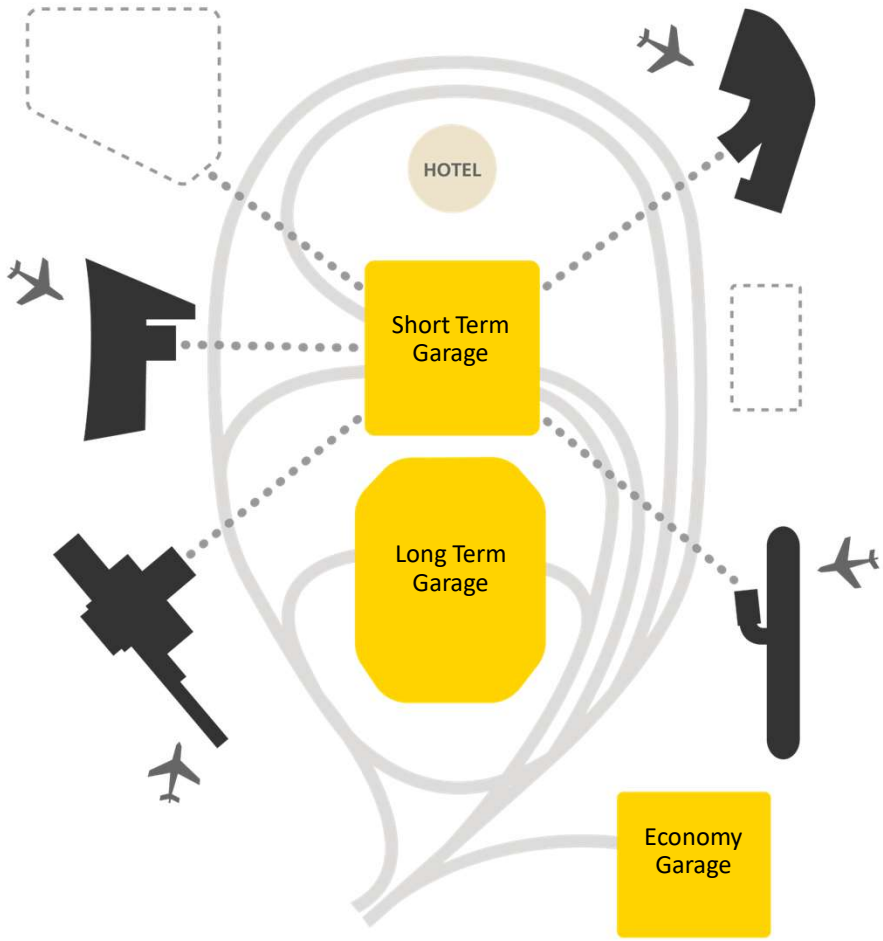
Planned 16-gate Airside D scheduled to open in 2029

Airside E

13 Gates
Opened in 1971
Rebuilt 2002
3.5m EPAX

Airside F

14 Gates
Opened in 1987
2.5m EPAX



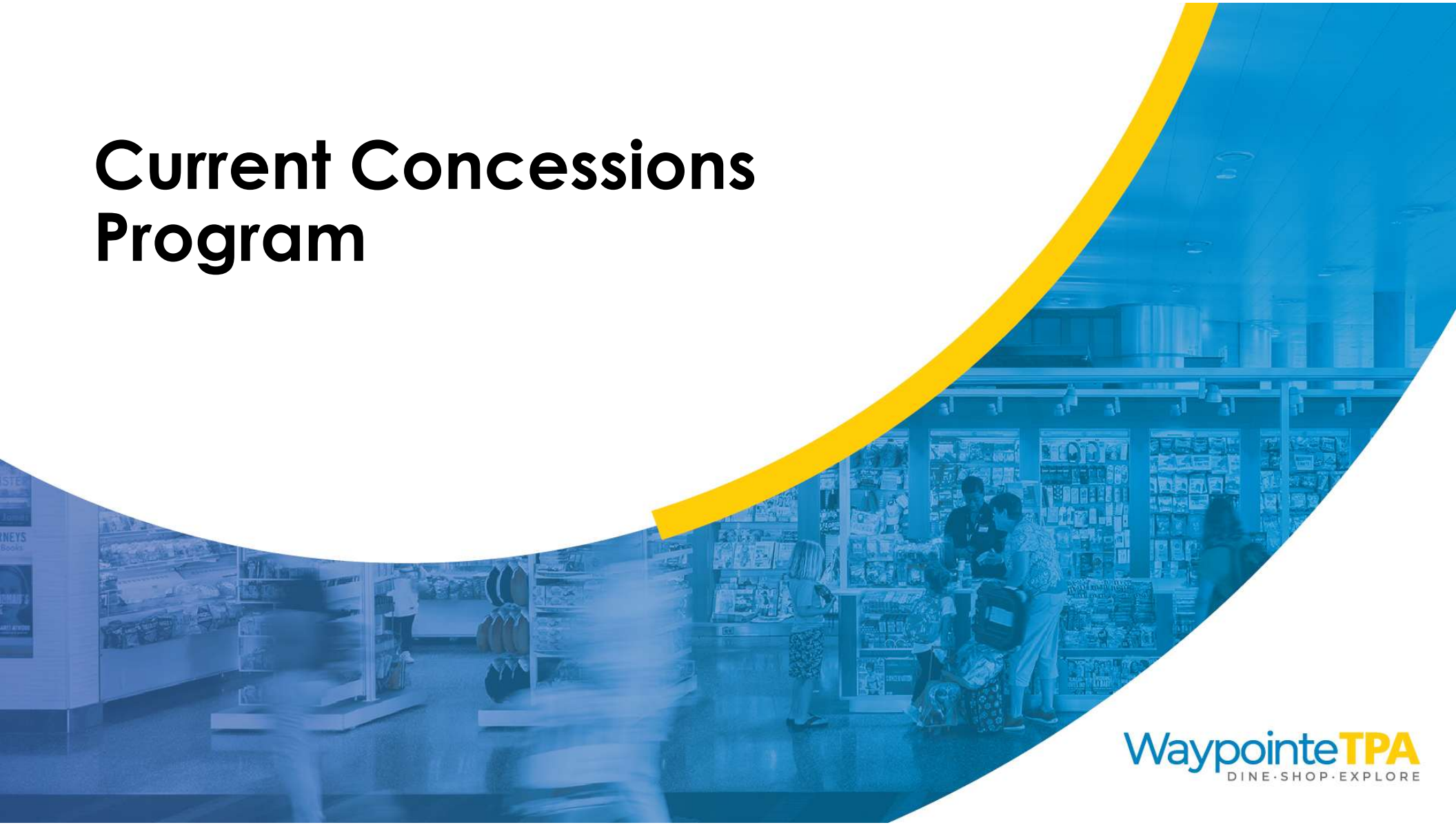
Airside C

16 Gates
Opened in 1971
Rebuilt 2005
3.4m EPAX

Airside A

16 Gates
Opened in 1995
3.0m EPAX

Current Concessions Program



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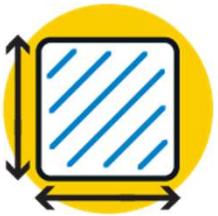
Concessions Locations
34 Food & Beverage
32 Retail



~107,000 sf

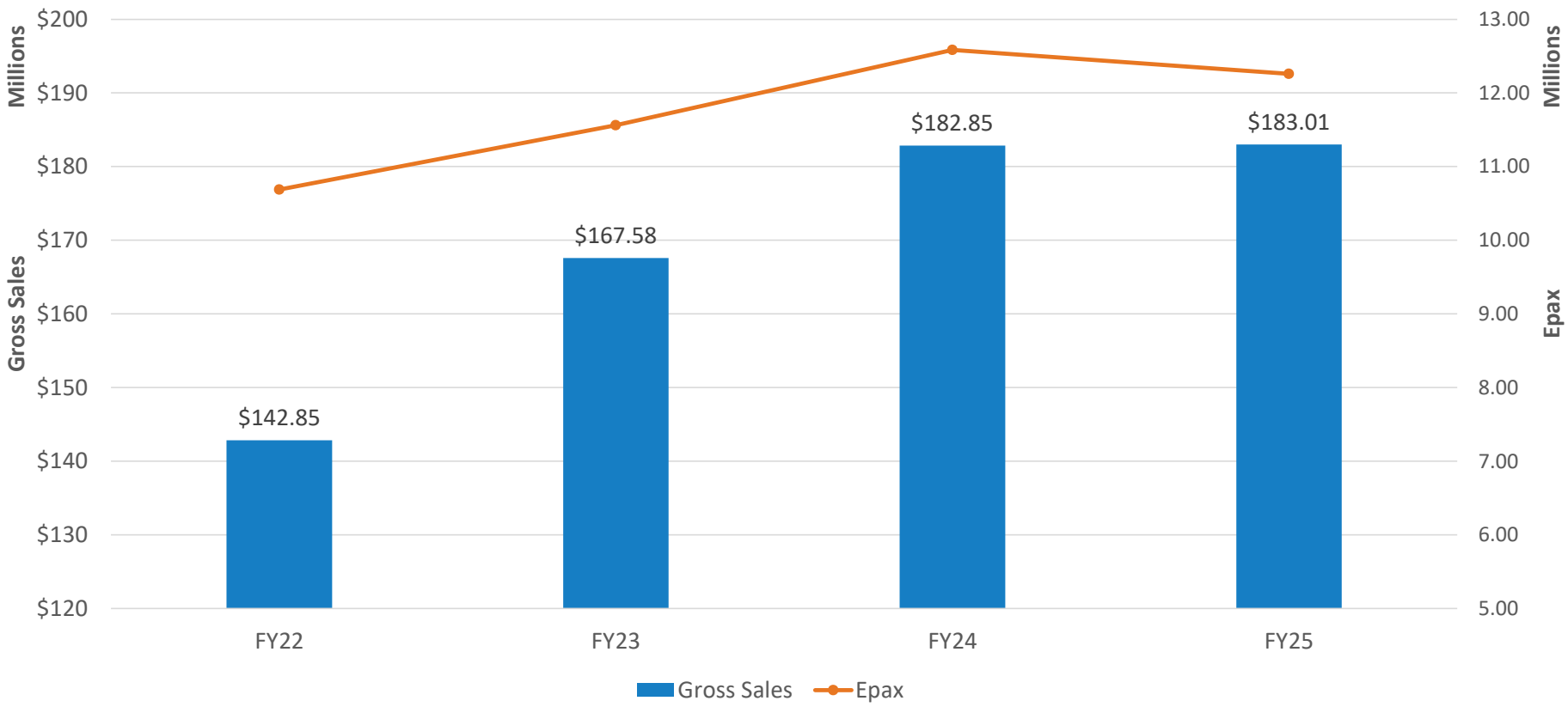
of Concessions space

$183M

FY25 gross receipts

Award Winning

Concessions Sales History



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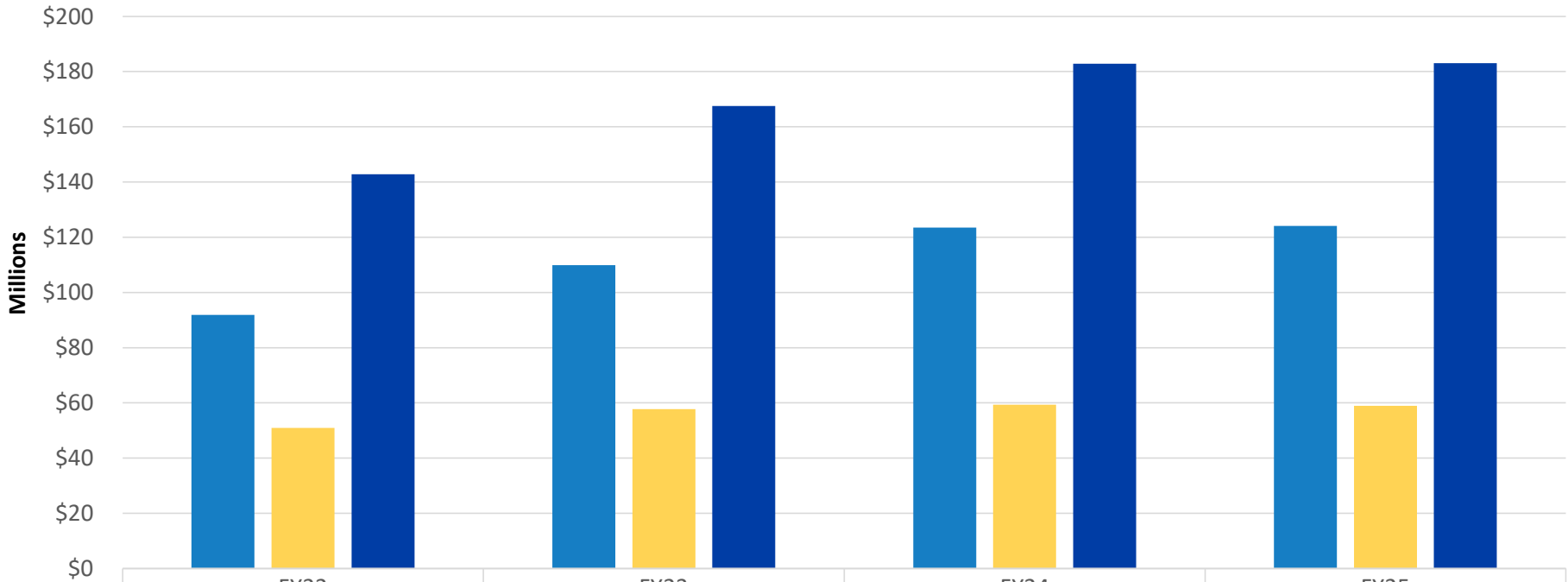
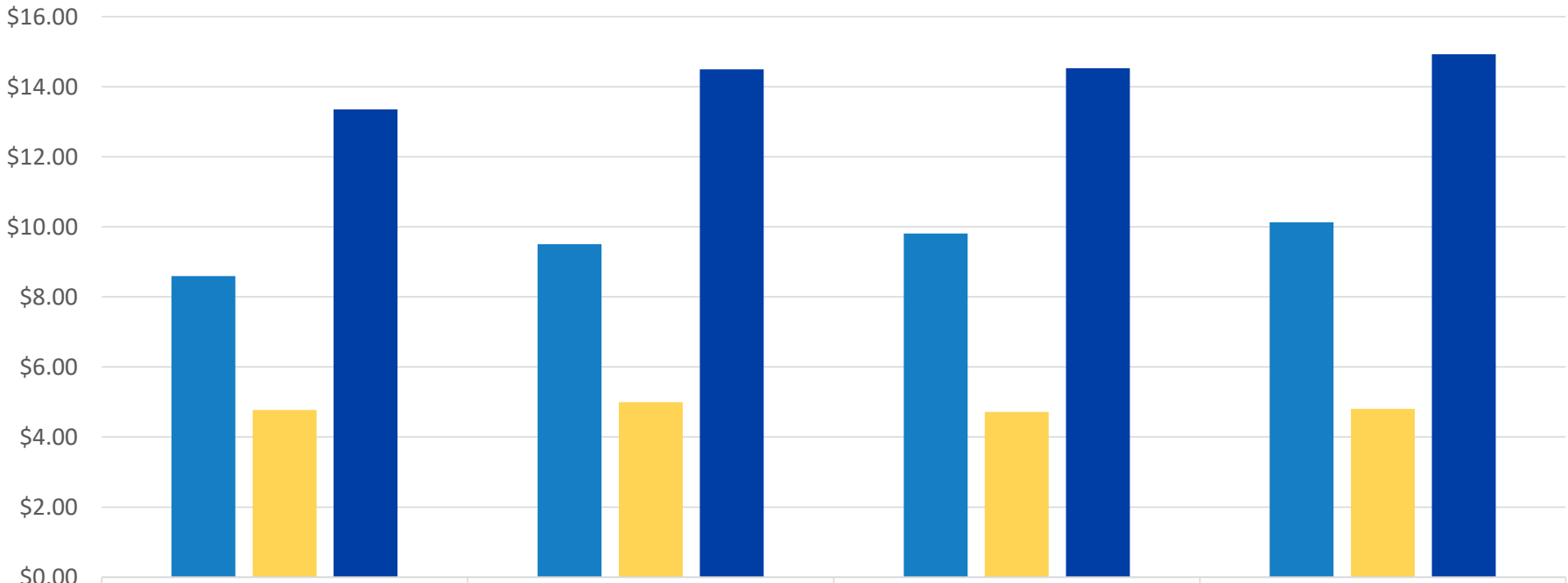
Concessions Sales by Product



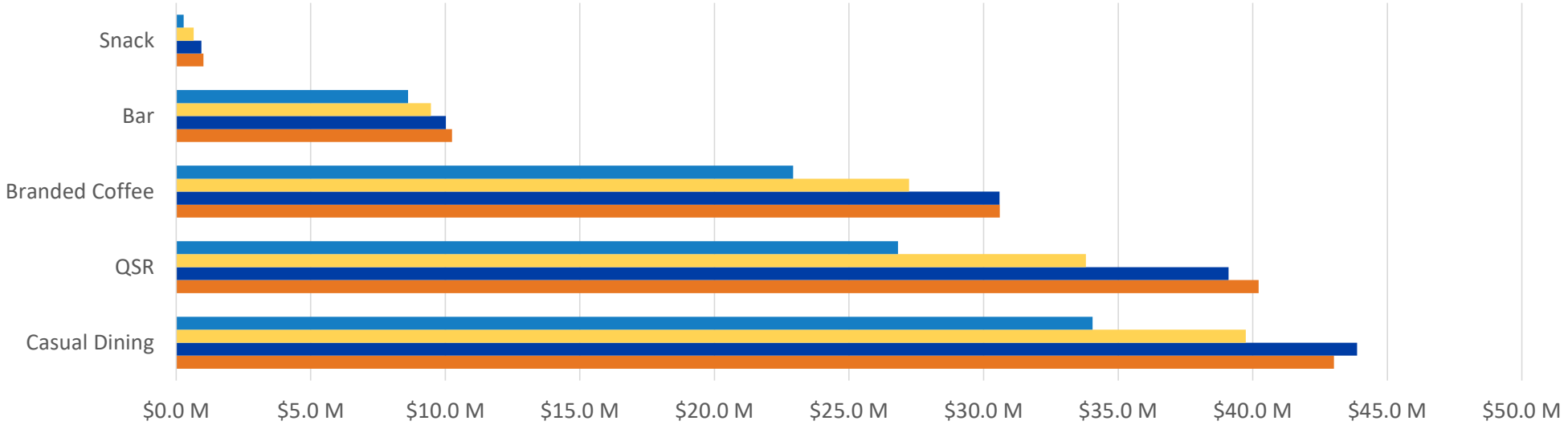
	FY22	FY23	FY24	FY25
Food & Beverage	$91.9 M	$109.9 M	$123.5 M	$124.1 M
Retail	$51.0 M	$57.7 M	$59.4 M	$58.9 M
Total	$142.9 M	$167.6 M	$182.8 M	$183.0 M

Sales per Enplanement by Product



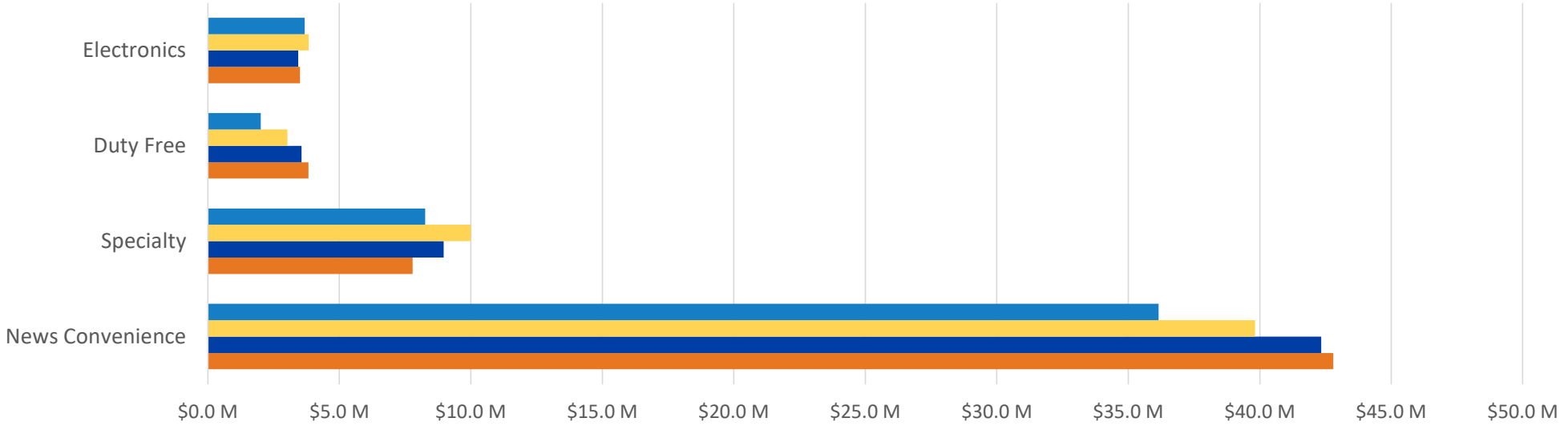
	FY22	FY23	FY24	FY25
Food & Beverage	$8.60	$9.50	$9.81	$10.12
Retail	$4.77	$4.99	$4.72	$4.80
Total	$13.36	$14.50	$14.53	$14.93

Concessions Sales by Category - F&B



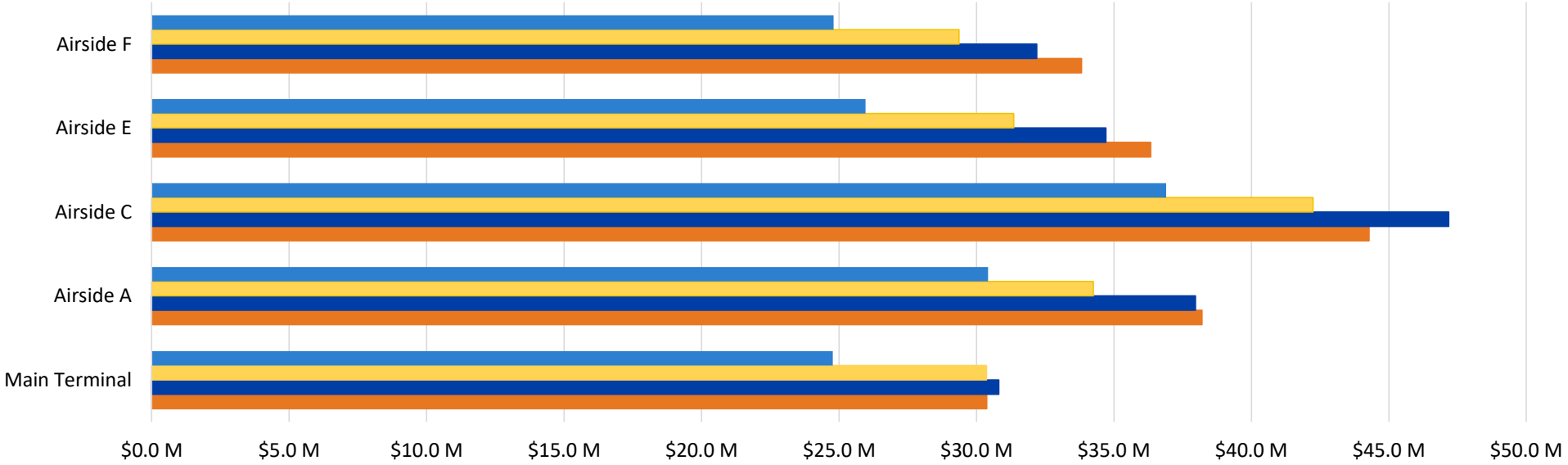
	Casual Dining	QSR	Branded Coffee	Bar	Snack
FY22	$34.0 M	$26.8 M	$22.9 M	$8.6 M	$0.3 M
FY23	$39.7 M	$33.8 M	$27.2 M	$9.5 M	$0.7 M
FY24	$43.9 M	$39.1 M	$30.6 M	$10.0 M	$0.9 M
FY25	$43.0 M	$40.2 M	$30.6 M	$10.3 M	$1.0 M

Concessions Sales by Category - Retail



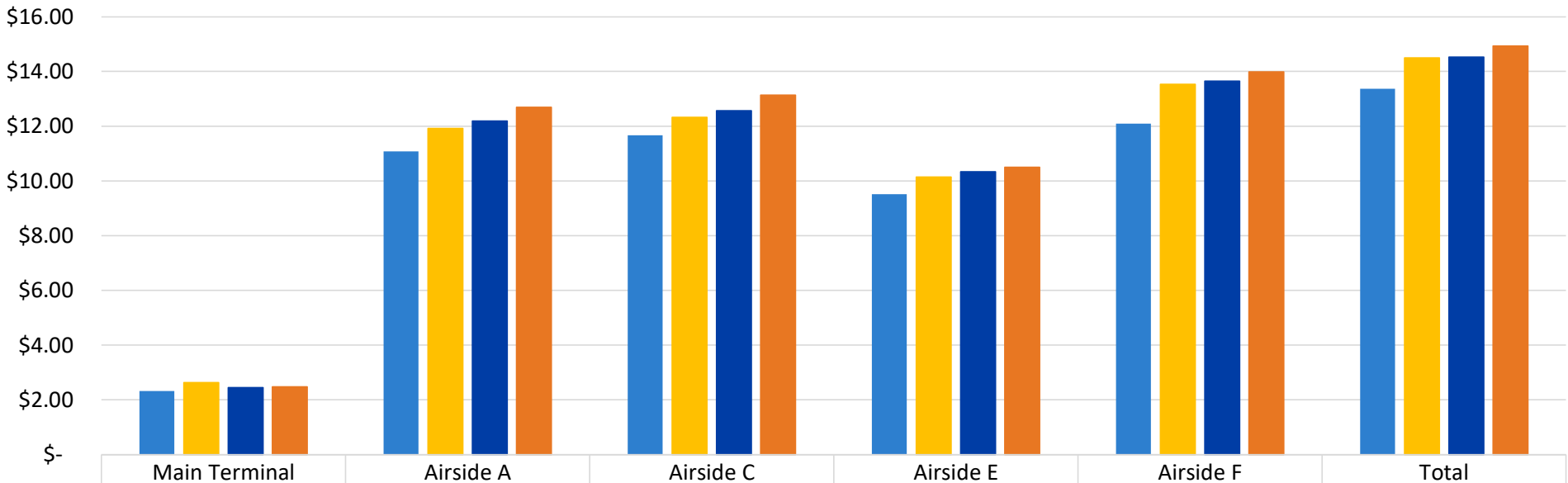
	News Convenience	Specialty	Duty Free	Electronics
FY22	$36.2 M	$8.3 M	$2.0 M	$3.7 M
FY23	$39.8 M	$10.0 M	$3.0 M	$3.8 M
FY24	$42.3 M	$9.0 M	$3.6 M	$3.4 M
FY25	$42.8 M	$7.8 M	$3.8 M	$3.5 M

Concessions Sales by Terminal



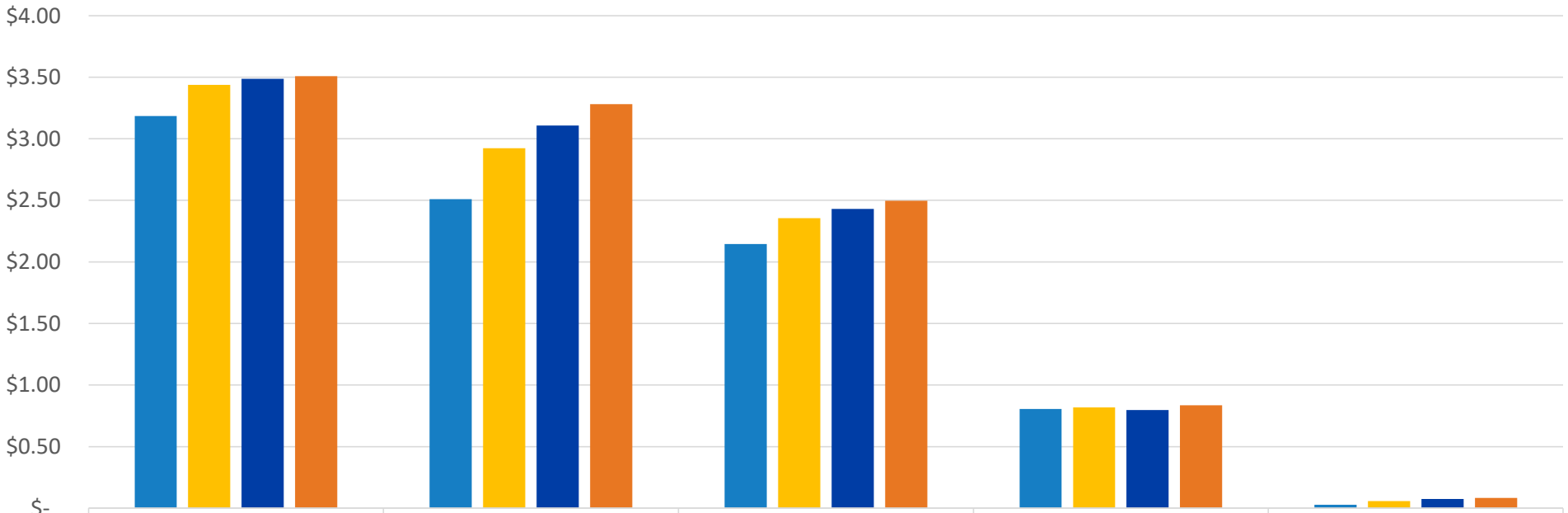
	Main Terminal	Airside A	Airside C	Airside E	Airside F
FY22	$24.8 M	$30.4 M	$36.9 M	$26.0 M	$24.8 M
FY23	$30.4 M	$34.3 M	$42.2 M	$31.4 M	$29.4 M
FY24	$30.8 M	$38.0 M	$47.2 M	$34.7 M	$32.2 M
FY25	$30.4 M	$38.2 M	$44.3 M	$36.3 M	$33.8 M

Sales per Enplanement by Terminal



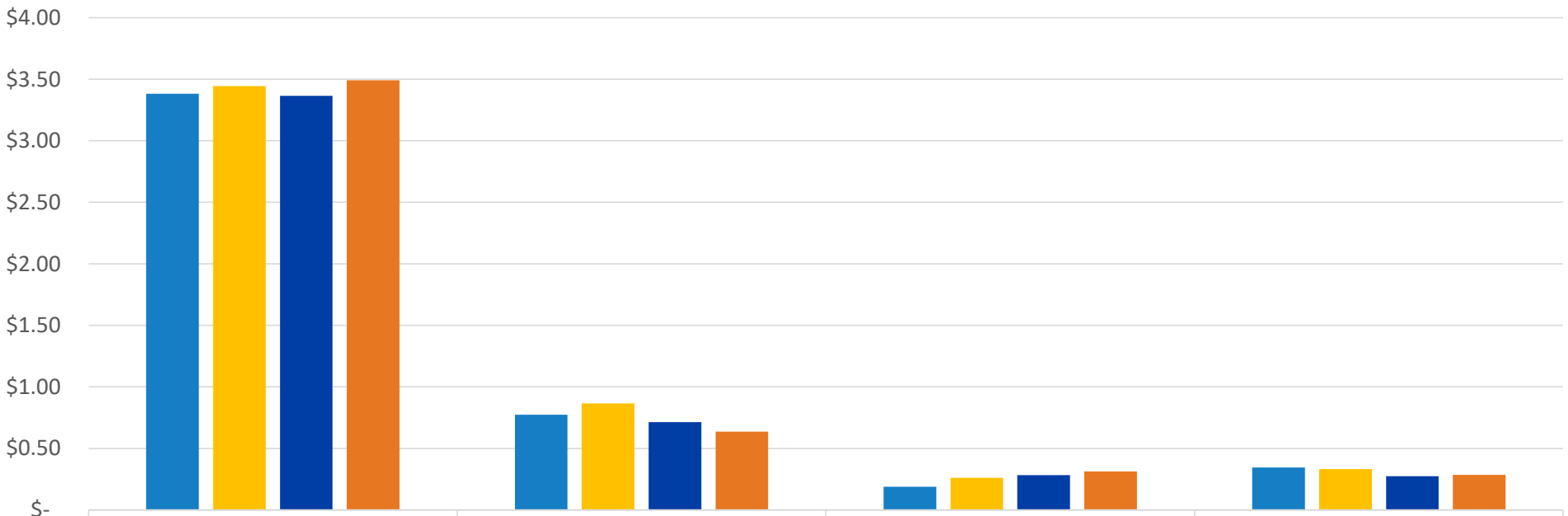
	Main Terminal	Airside A	Airside C	Airside E	Airside F	Total
FY22	$2.32	$11.07	$11.67	$9.52	$12.09	$13.36
FY23	$2.63	$11.92	$12.33	$10.14	$13.54	$14.50
FY24	$2.45	$12.19	$12.57	$10.33	$13.65	$14.53
FY25	$2.48	$12.69	$13.14	$10.50	$13.98	$14.93

Sales per Enplanement by Category - F&B



	Casual Dining	QSR	Branded Coffee	Bar	Snack
FY22	$3.19	$2.51	$2.14	$0.81	$0.03
FY23	$3.44	$2.92	$2.36	$0.82	$0.06
FY24	$3.49	$3.11	$2.43	$0.80	$0.07
FY25	$3.51	$3.28	$2.50	$0.84	$0.08

Sales per Enplanement by Category - Retail



	News Convenience	Specialty	Duty Free	Electronics
FY22	$3.38	$0.77	$0.19	$0.34
FY23	$3.44	$0.87	$0.26	$0.33
FY24	$3.36	$0.71	$0.28	$0.27
FY25	$3.49	$0.64	$0.31	$0.29

Operating at Airports

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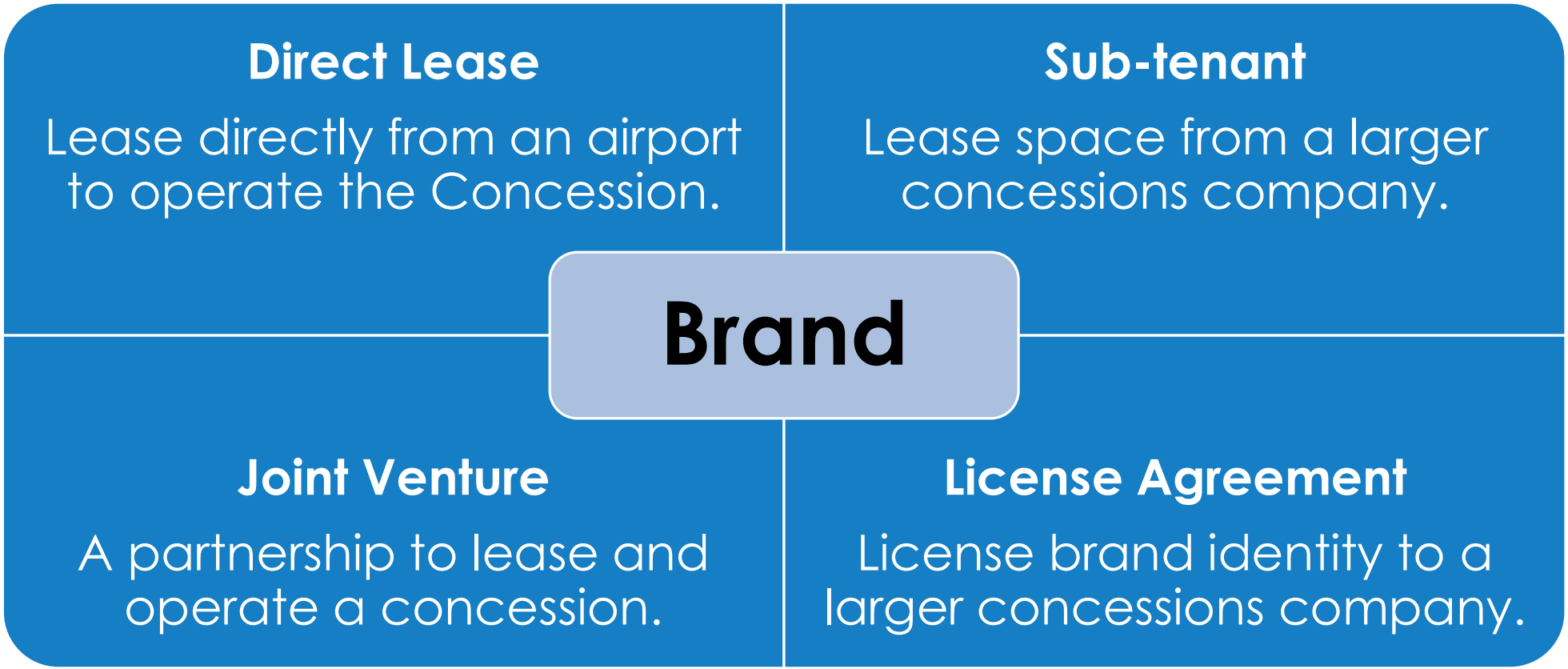
Opportunities for Business



Operating at Airports

- Hours of operations (first to last flight)
- Irregular operations
- Flight banking
- Badging and security
- Employee parking
- Higher than typical labor costs
- Merchandise and product delivery and storage

- Rent is the greater of a guaranteed amount or percentage of sales
- Additional direct costs such as CRDC, Concessions Services Fee and Promotional Fund
- Units are offered in packages
- Selected based on competitive proposals with public evaluation

Concessions Redevelopment Program

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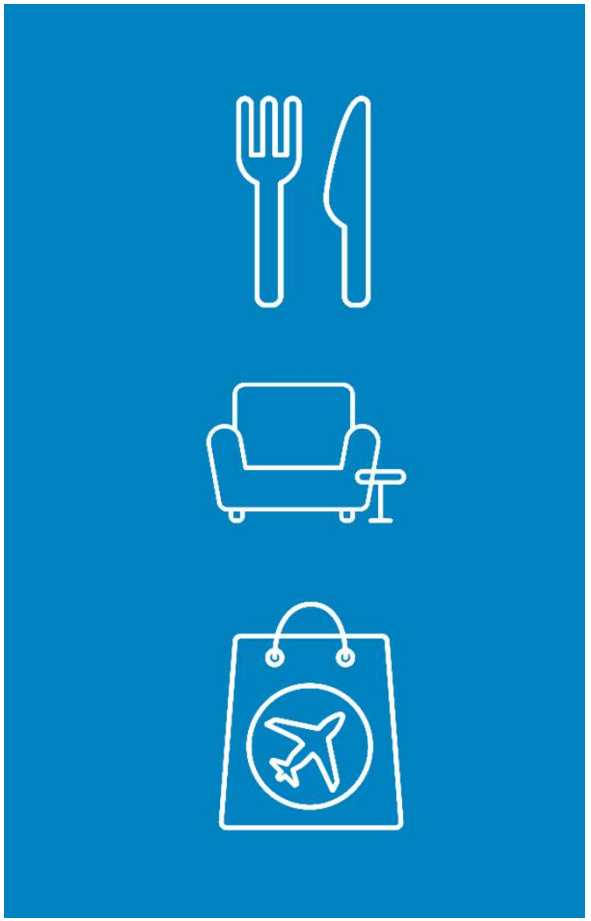
Tampa International Airport

Concessions Redevelopment Program

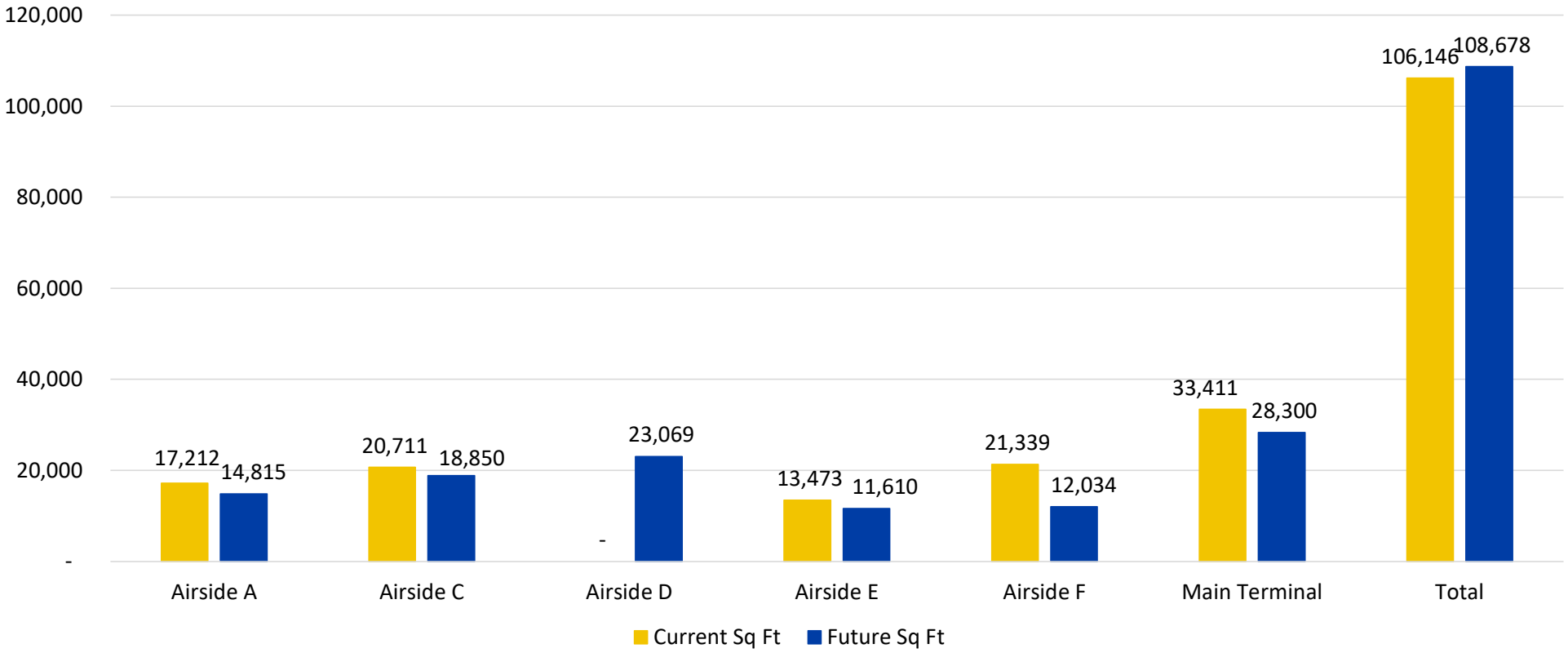
- Multi-year, multi-phased approach to redevelop all Concessions offerings from 2026 thru 2032

- Types of locations include, but not limited to:
  - Restaurants
  - Common use lounges
  - Coffee shops
  - Gourmet markets
  - Hybrid Retail
  - Newsstands
  - Duty free

- A single contract will contain multiple locations throughout the airport

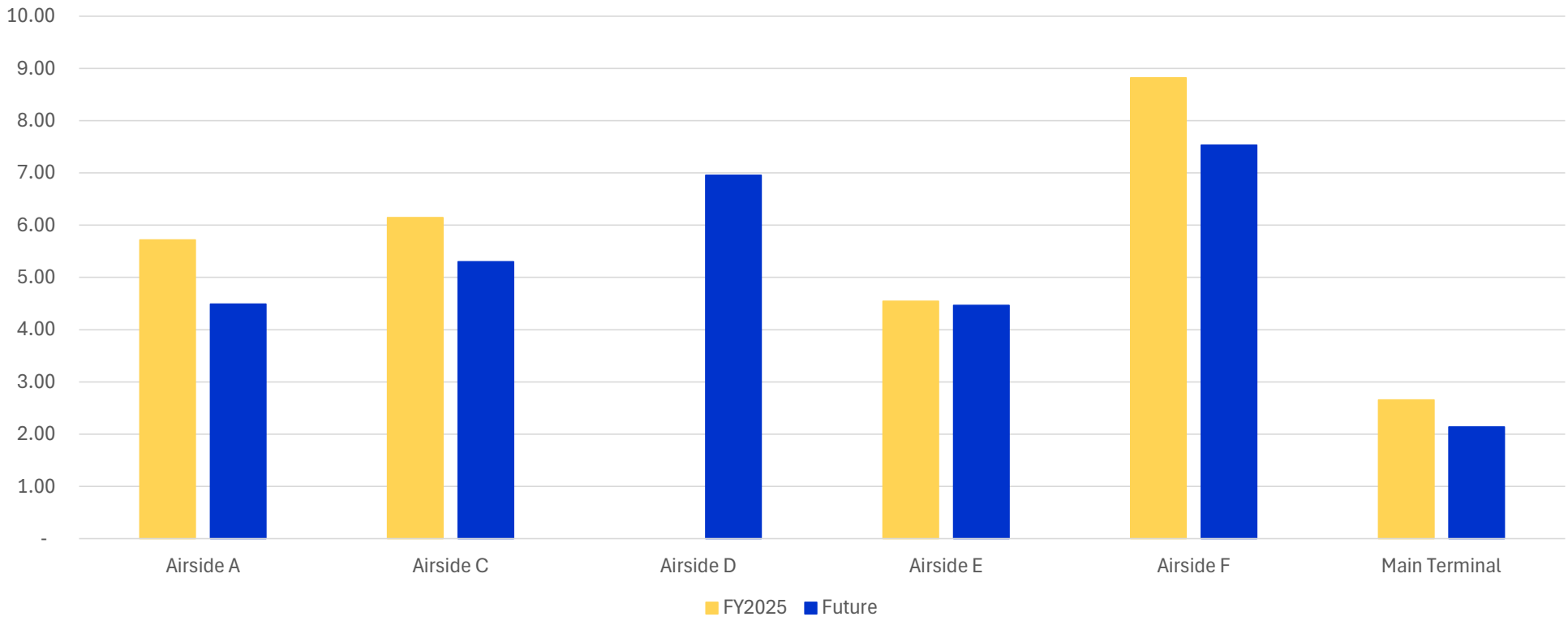


Concessions Program Sizing



Source: HCAA, Paslay Group, August 2026

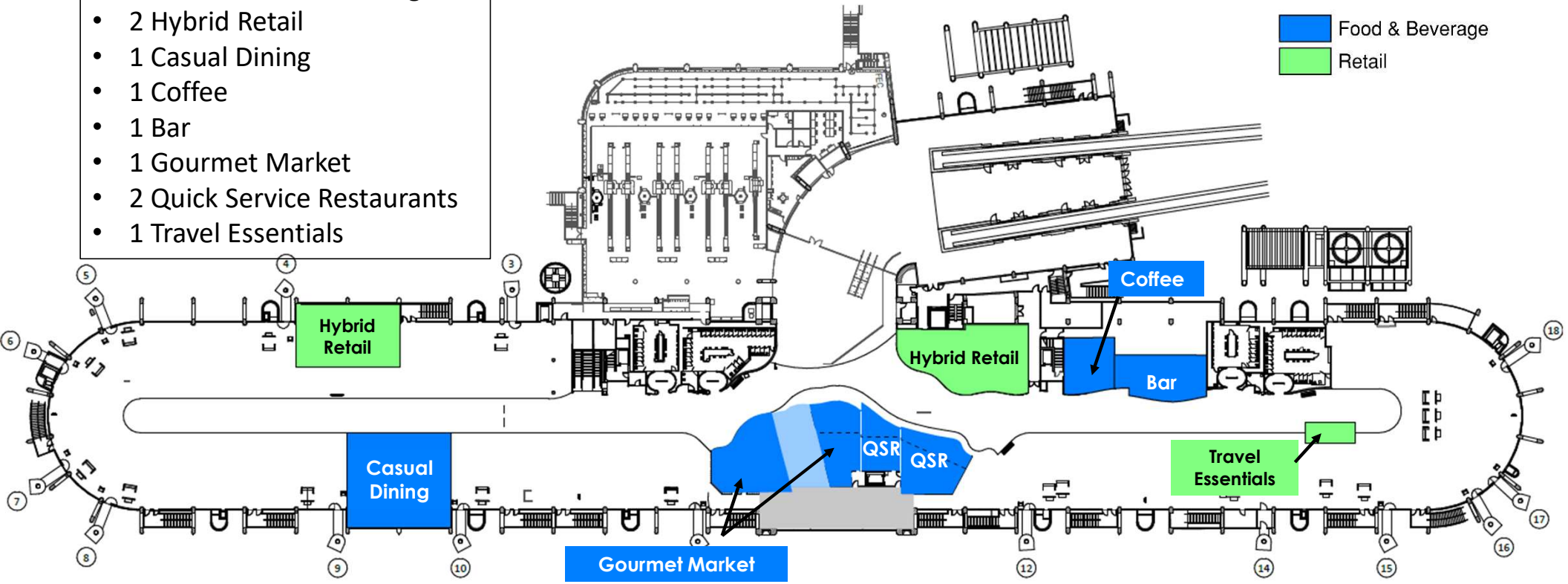
Program Sizing Summary - Rough Order of Magnitude



Source: HCAA, Paslay Group, March 2026

Preliminary Airside A Concessions Program

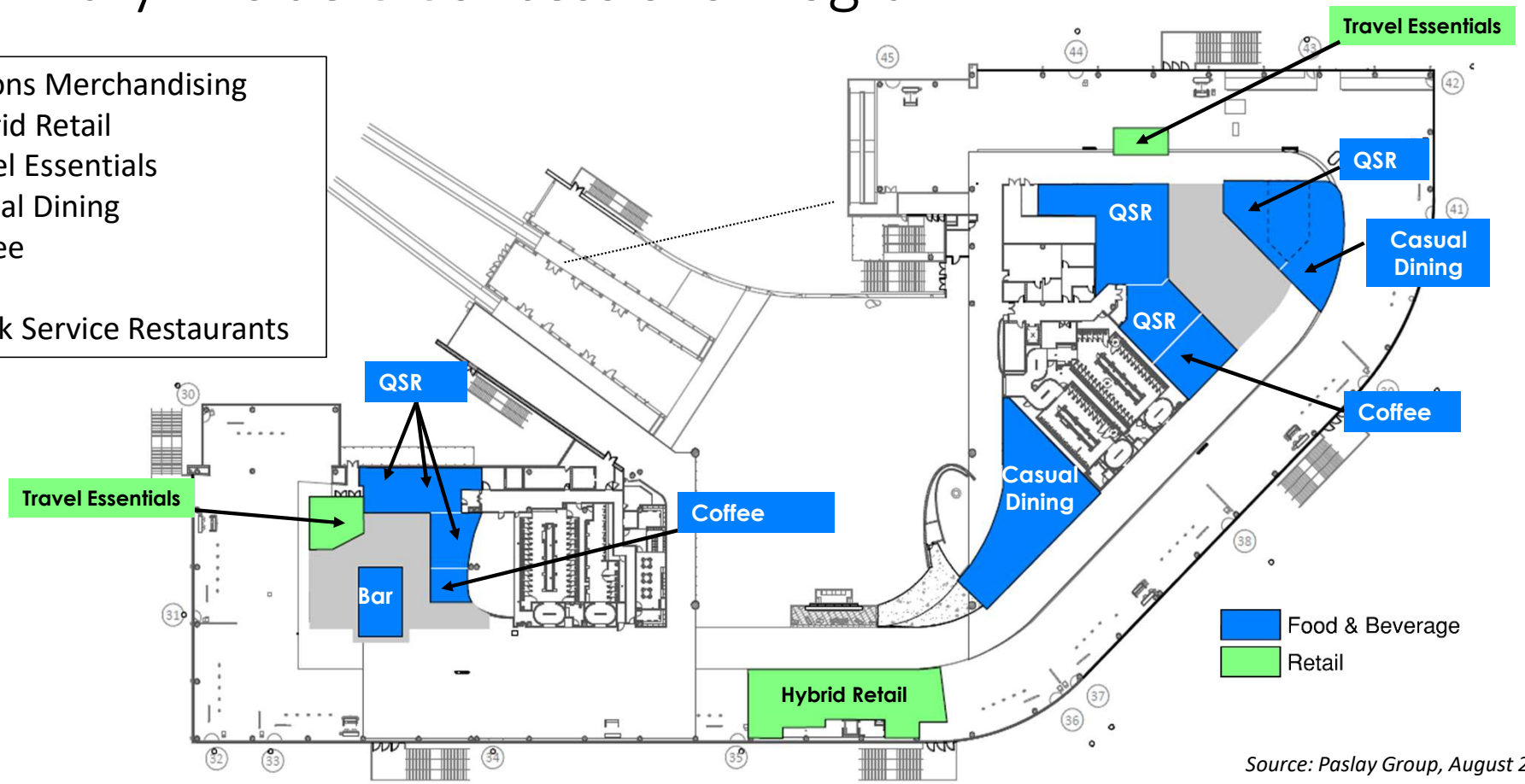
Concessions Merchandising
- 2 Hybrid Retail
- 1 Casual Dining
- 1 Coffee
- 1 Bar
- 1 Gourmet Market
- 2 Quick Service Restaurants
- 1 Travel Essentials



Source: Paslay Group, August 2026

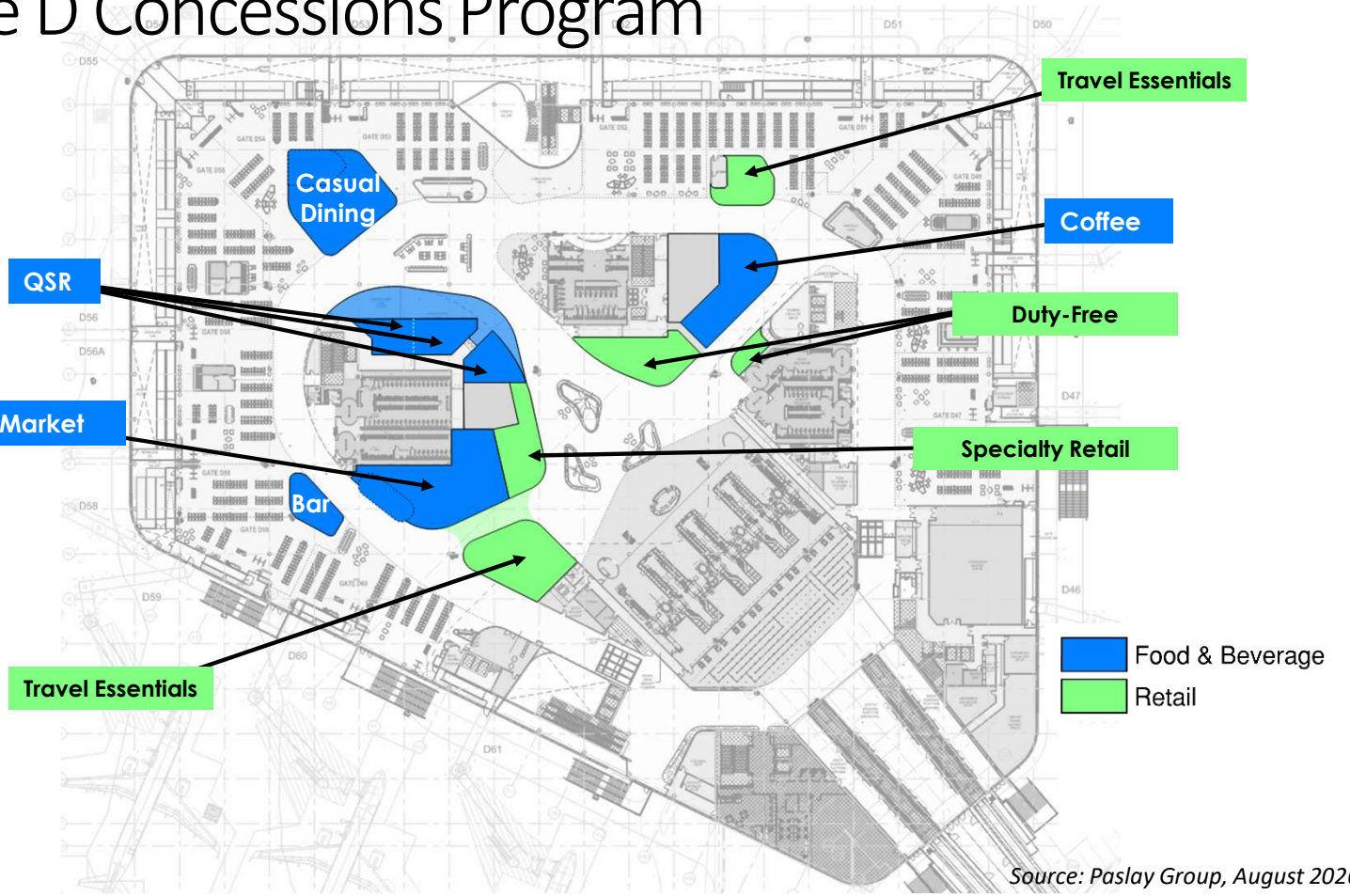
Preliminary Airside C Concessions Program

Concessions Merchandising
- 1 Hybrid Retail
- 2 Travel Essentials
- 2 Casual Dining
- 2 Coffee
- 1 Bar
- 6 Quick Service Restaurants



Source: Paslay Group, August 2026

Preliminary Airside D Concessions Program

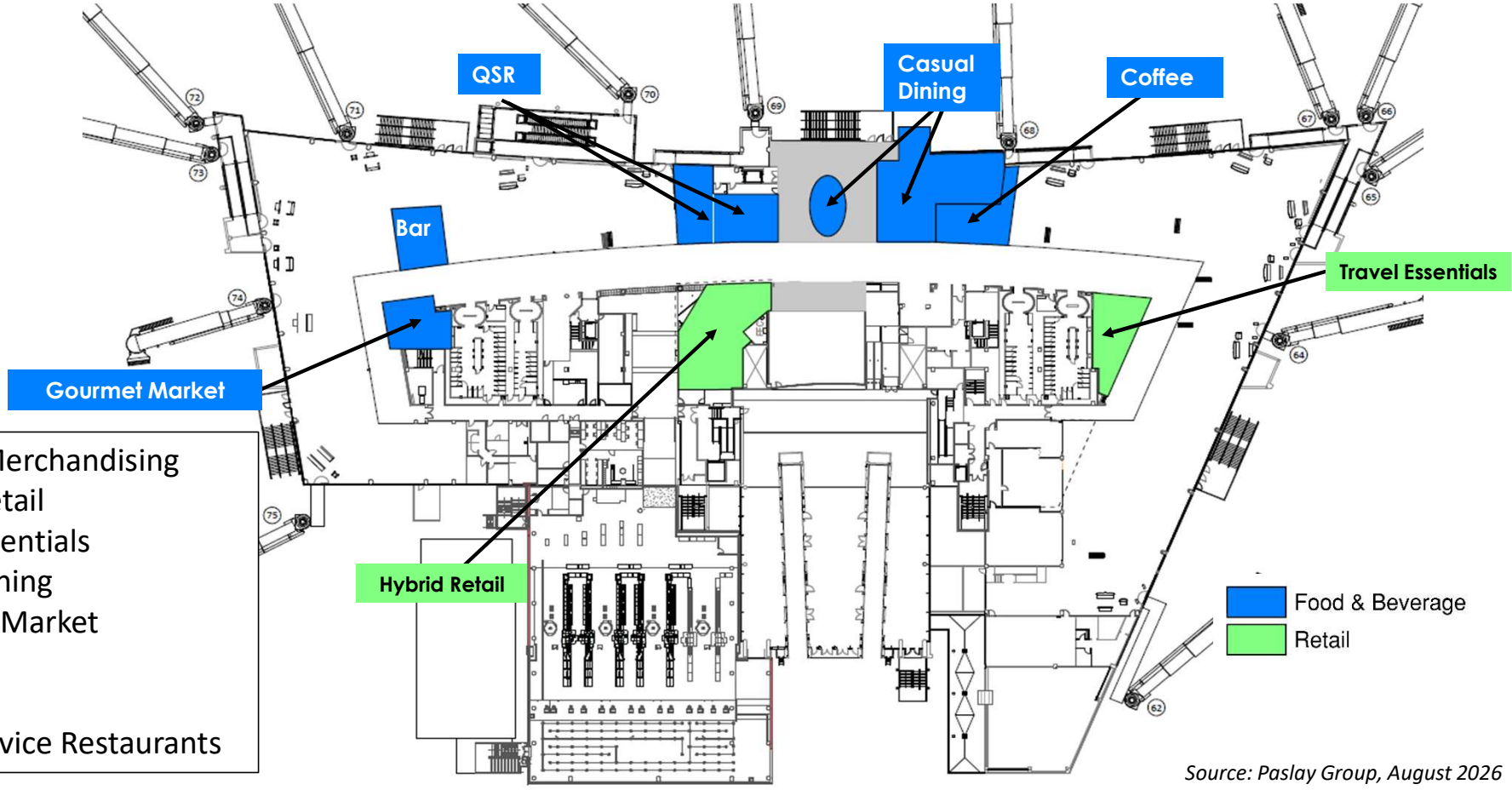


Concessions Merchandising

- 2 Travel Essentials
- 1 Casual Dining
- 1 Gourmet Market
- 1 Coffee
- 1 Bar
- 3 Quick Service Restaurants
- 1 Duty Free
- 1 Specialty Retail

Source: Paslay Group, August 2026

Preliminary Airside E Concessions Program

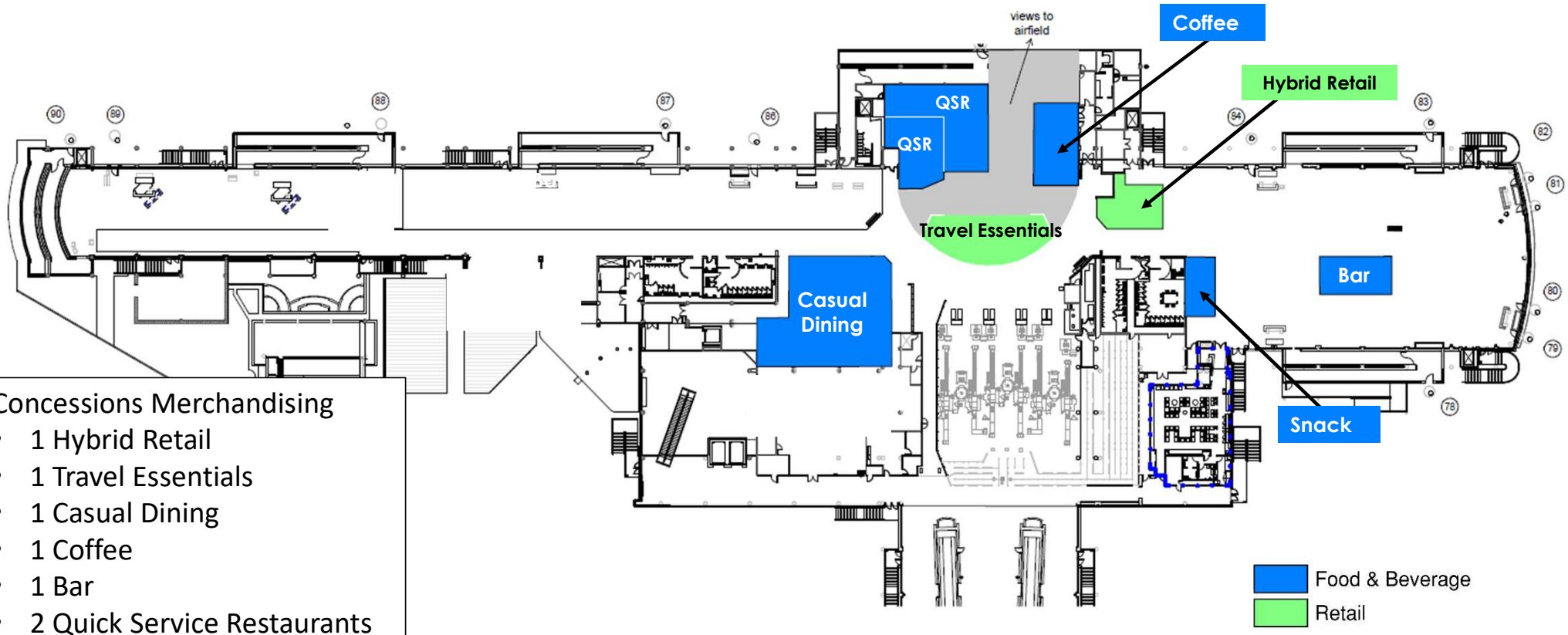


Concessions Merchandising

- 1 Hybrid Retail
- 1 Travel Essentials
- 1 Casual Dining
- 1 Gourmet Market
- 1 Coffee
- 1 Bar
- 2 Quick Service Restaurants

Source: Paslay Group, August 2026

Preliminary Airside F Concessions Program

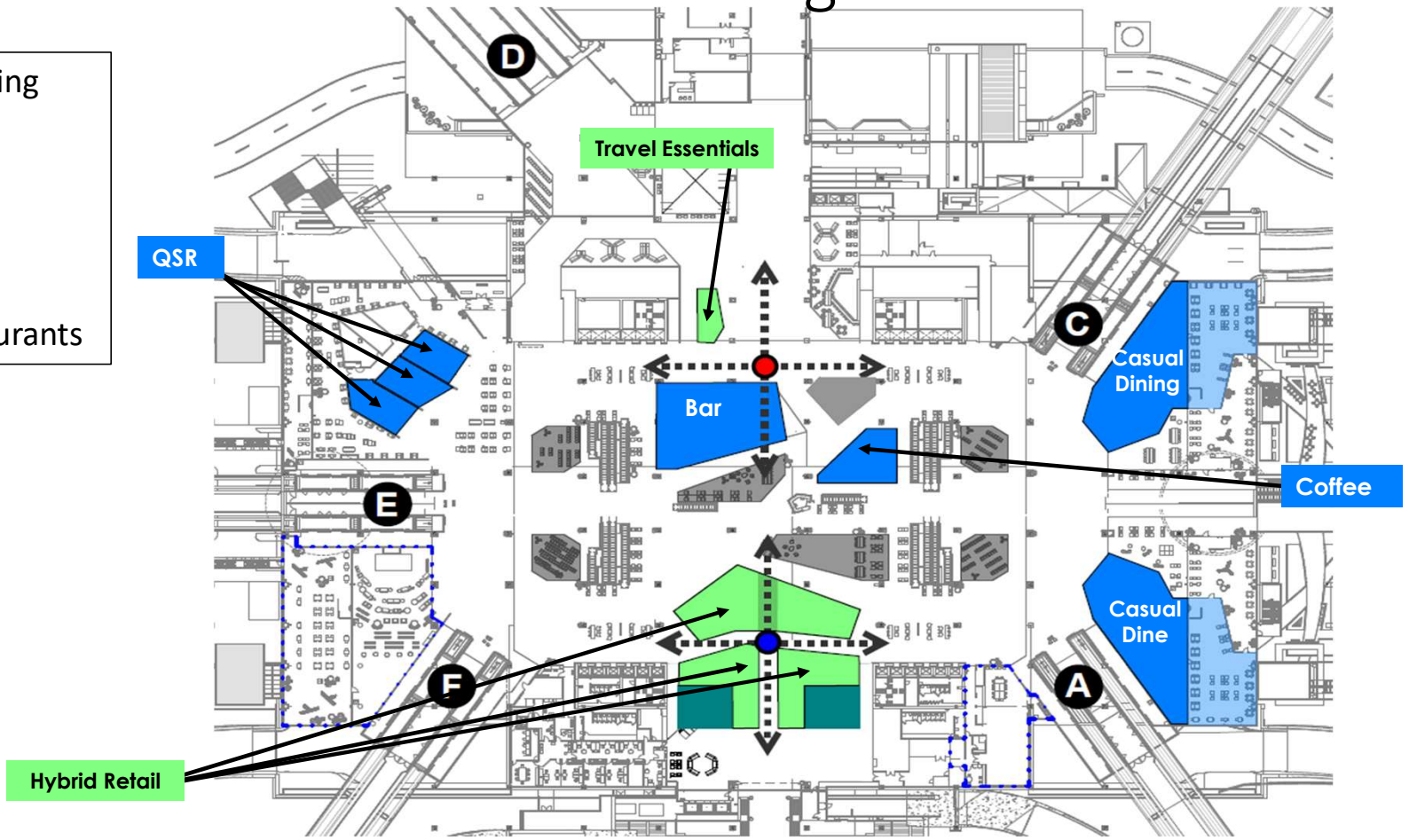


Concessions Merchandising
- 1 Hybrid Retail
- 1 Travel Essentials
- 1 Casual Dining
- 1 Coffee
- 1 Bar
- 2 Quick Service Restaurants
- 1 Snack

Source: Paslay Group, August 2026

Preliminary Main Terminal Concessions Program

Concessions Merchandising
- 1 Hybrid Retail
- 1 Travel Essentials
- 2 Casual Dining
- 1 Coffee
- 1 Bar
- 3 Quick Service Restaurants



Food & Beverage
Retail

Source: Paslay Group, August 2026

Small Business Enterprise Concessionaire (SBEC) Program

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SBEC CERTIFICATION CRITERIA

The firm must be organized as a for-profit business.

Each qualifying owner's **Personal Net Worth must be less than $2.047 million**, excluding retirement accounts, the individual's ownership interest in the applicant firm, and the equity in his/her primary residence.

The firm **does not exceed $56.42 million in gross receipts**, averaged over the firm's previous five years, including gross receipts of all affiliate firms.

The qualifying owner(s) must be a U.S. citizen or lawfully admitted permanent resident and own at least 51% of the firm.

Certification is open to small businesses regardless of their location.

GET CERTIFIED

SCAN THE QR CODE TO GET STARTED

MEET THE BANKS

Next Steps

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Learn about TPA Concessions

Procurement Webpage

TampaAirport.com/business/business-opportunities

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Networking

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