

SAT Terminal C Concession Industry Day

May 7, 2026



Agenda

- | | |
|----------|---|
| 1 | Welcome and Introductions |
| 2 | Terminal C Development |
| 3 | Existing Concession Program |
| 4 | Terminal C Concession Program Overview |
| 5 | Operational Requirements and Key Agreement Terms |
| 6 | Procurement Process and Timeline |
| 7 | Q&A |
| 8 | Networking |

The background is a solid dark blue color. It features a decorative pattern of light blue airplane silhouettes and dots. The airplanes are scattered across the left side of the image, appearing to fly from the top-left towards the bottom-right. The dots are also scattered, with some forming a faint, curved line that follows the general direction of the airplanes. The overall aesthetic is clean and modern.

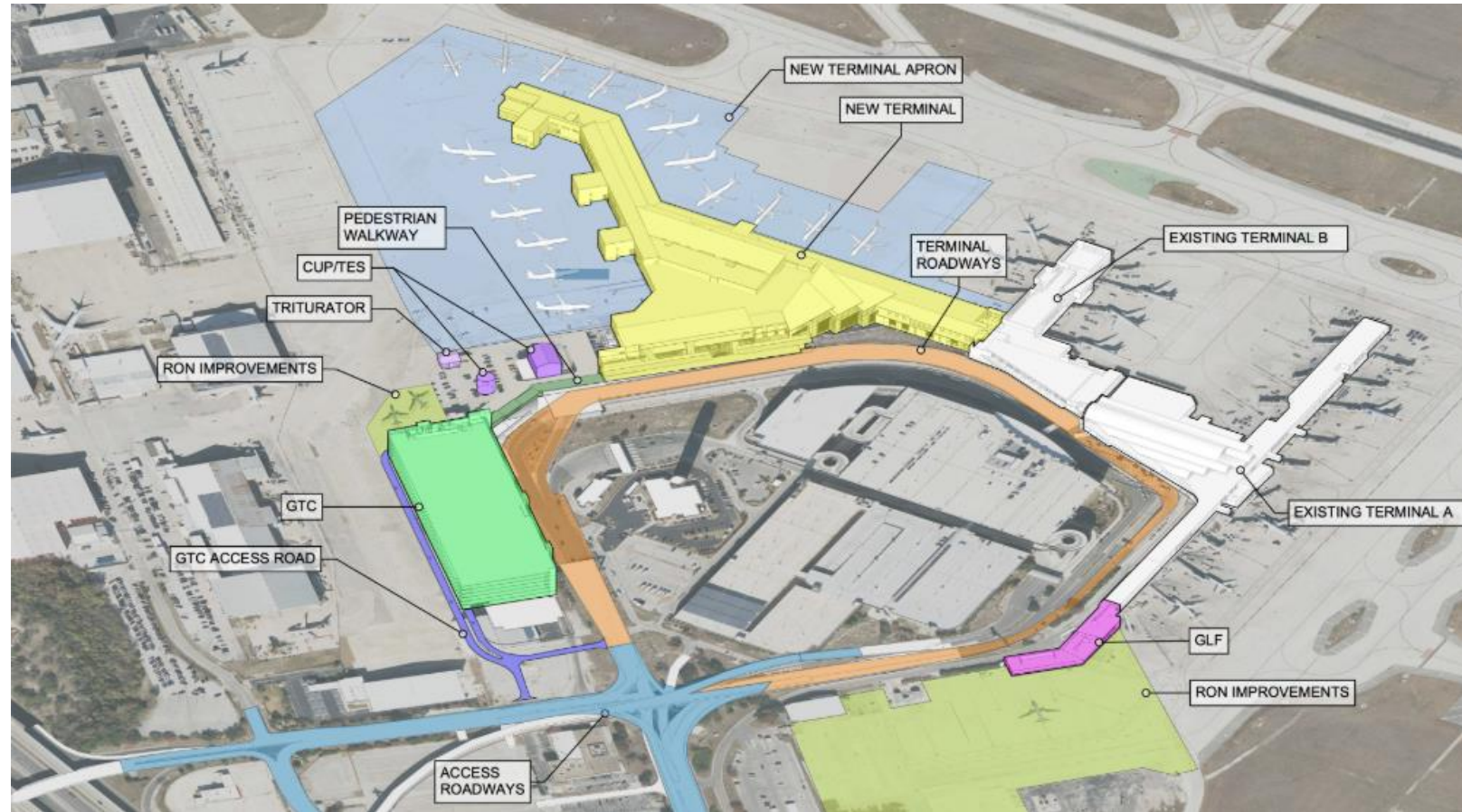
Welcome and Introductions

The background features a dark blue gradient with several light blue airplane silhouettes flying in various directions. A series of light blue dots of varying sizes forms a curved path across the left side of the image.

Terminal C Development

The 2020 Strategic Development Plan (SDP) outlines SAT's transformation into a modern, world-class airport. The first phase of the SDP includes:

- New Terminal C
- Terminal loop roadway modifications
- New parking garage
- Ground transportation center
- Runway extension



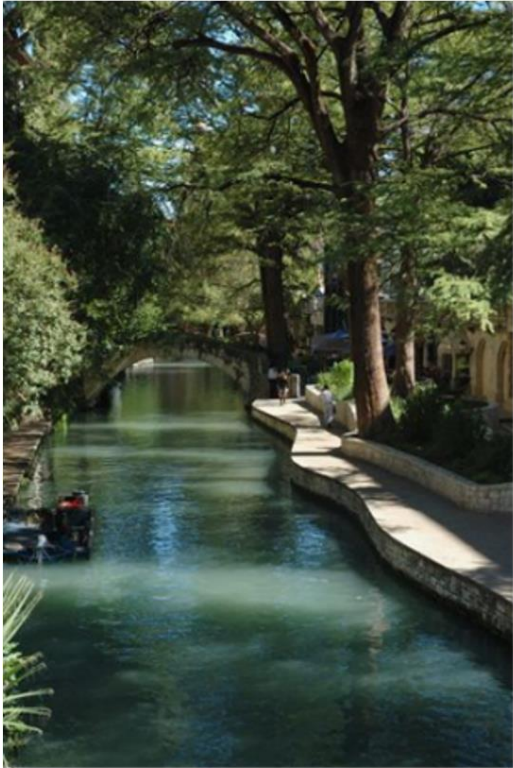
Terminal C Development

Features planned for Terminal C include:

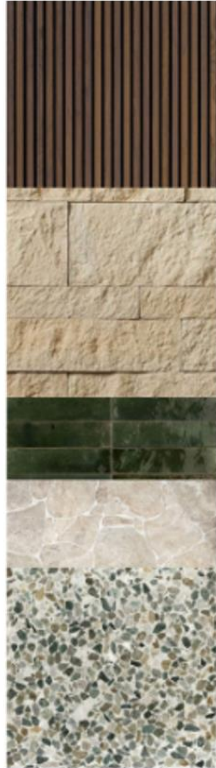
- 850,000+ sq. ft. of new terminal space and 18 new gates
- New central security checkpoint serving Terminal B and Terminal C
- 43,000 sq. ft. of new concession space
- Large holdrooms and modern passenger amenities
- Modern Federal Inspection Station to support expanded international travel
- Outdoor patio



A SECTION CUT THROUGH THE CITY OF SAN ANTONIO...



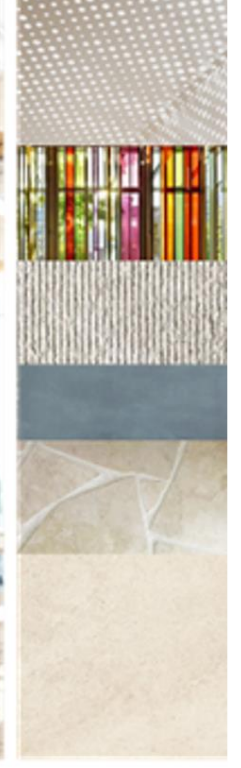
L1 - RIO



L2 - CALLE

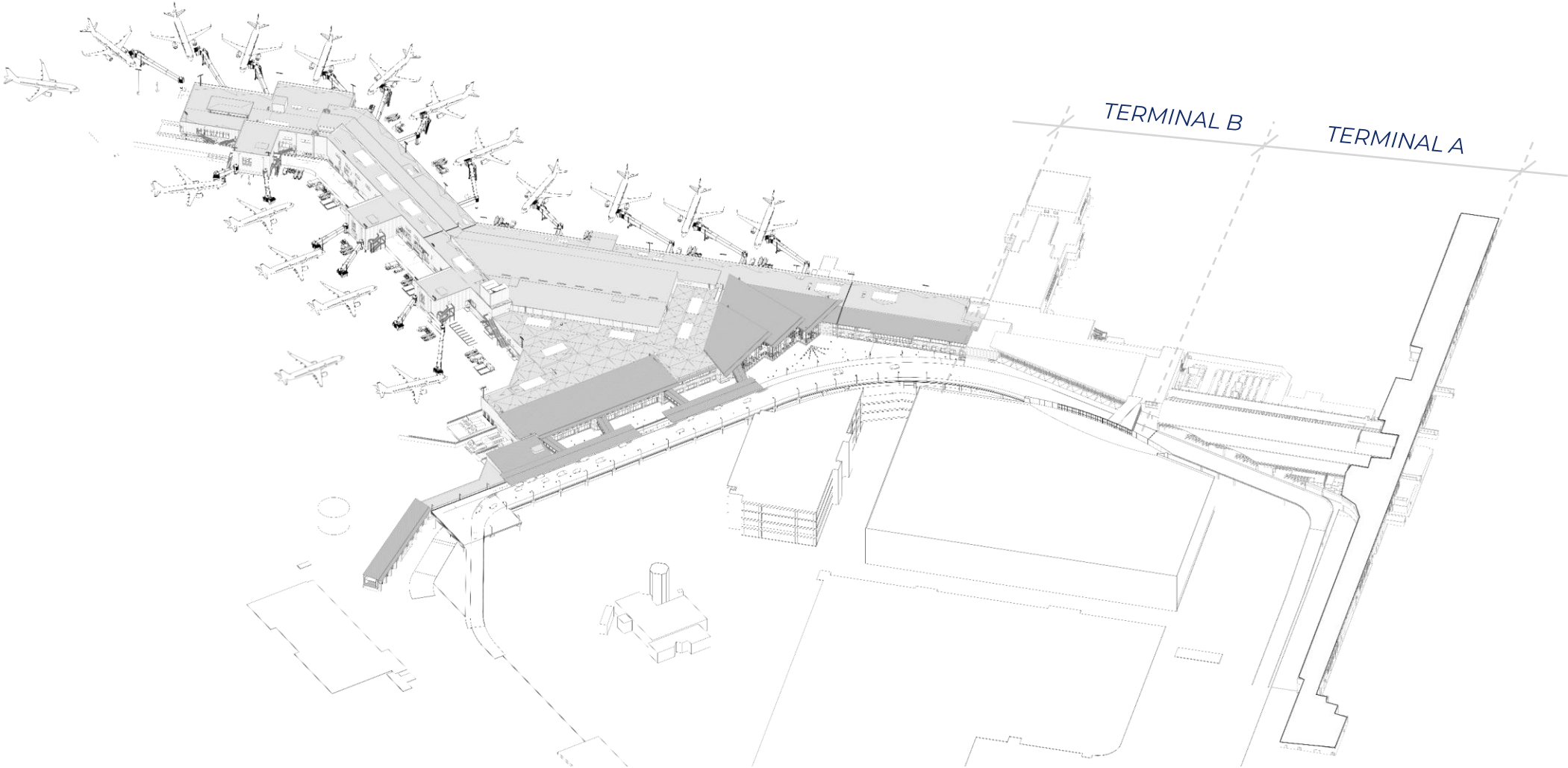


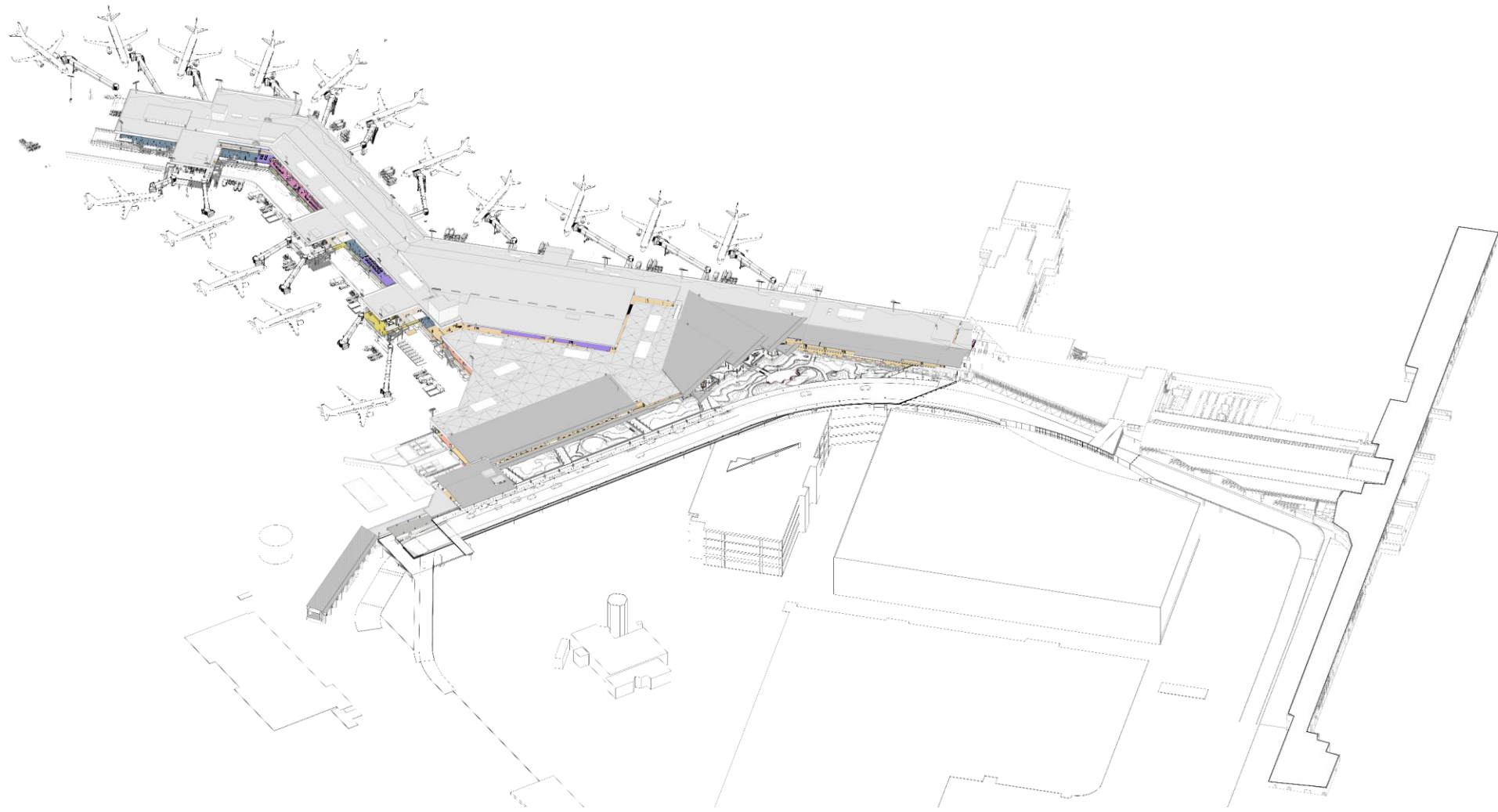
L3 - TERRAZA





NEW TERMINAL C

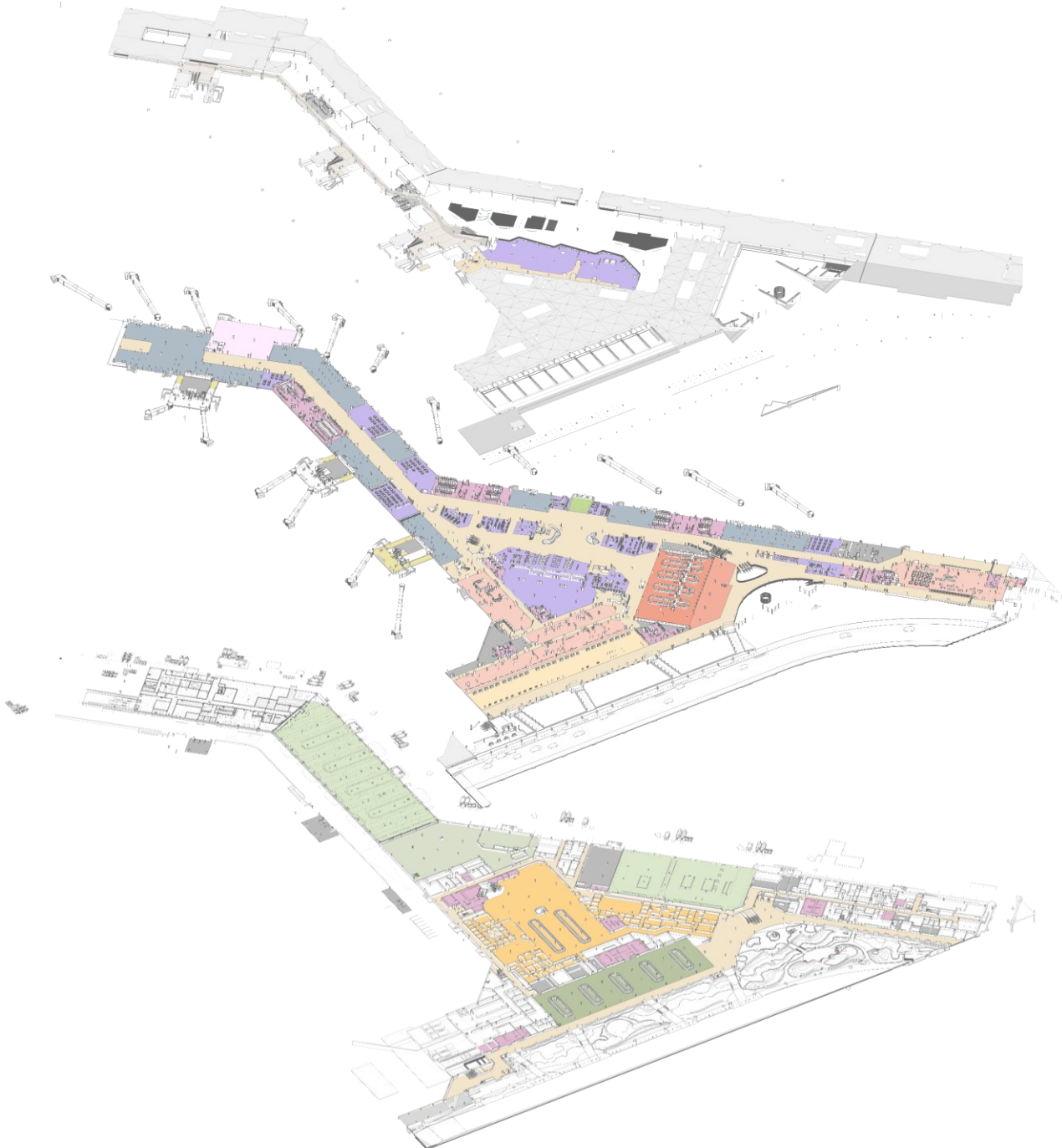























- Airline Support
- Airport Support
- Amenity
- Announcement Space and USO
- BHS
- Circulation
- Concession
- Concession Storage
- Holdrooms
- Immigration/Customs
- Lounge
- MEP/IT
- Open To Below
- Restrooms
- SHAFTS
- SSCP QUEUE
- SSCP/TSA
- Sterile Corridor/Gatehouse
- Support-TSA
- Ticketing Hall

PASSENGER FLOW

 MIXED DEPARTURE FLOW

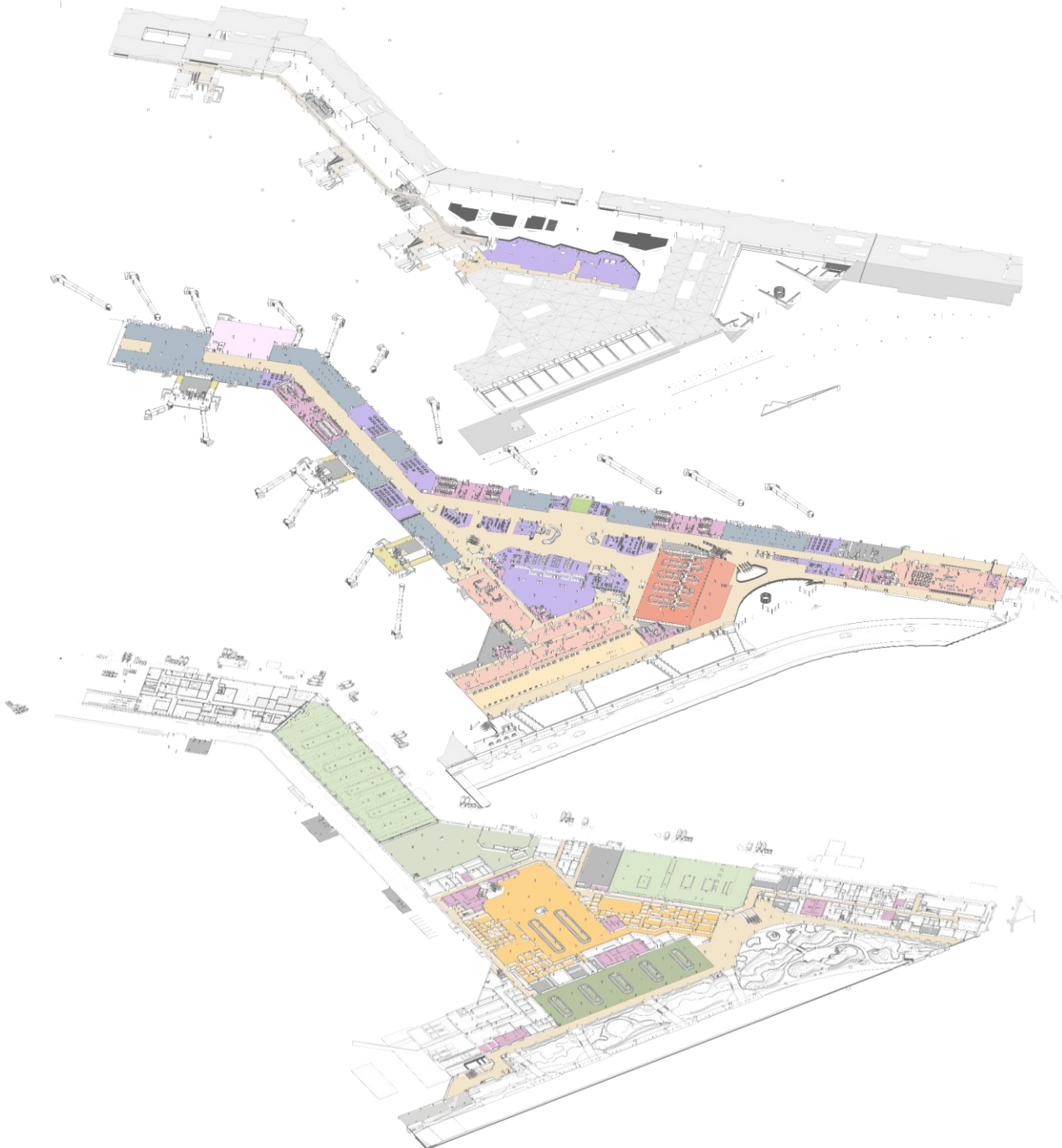





















- | | | |
|--|---|--|
|  Airline Support |  Concession Storage |  SSCP QUEUE |
|  Airport Support |  Holdrooms |  SSCP/TSA |
|  Amenity |  Immigration/Customs |  Sterile Corridor/Gatehouse |
|  Announcement Space and USO |  Lounge |  Support-TSA |
|  BHS |  MEP/IT |  Ticketing Hall |
|  Circulation |  Open To Below | |
|  Concession |  Restrooms | |

PASSENGER FLOW

 MIXED DEPARTURE FLOW

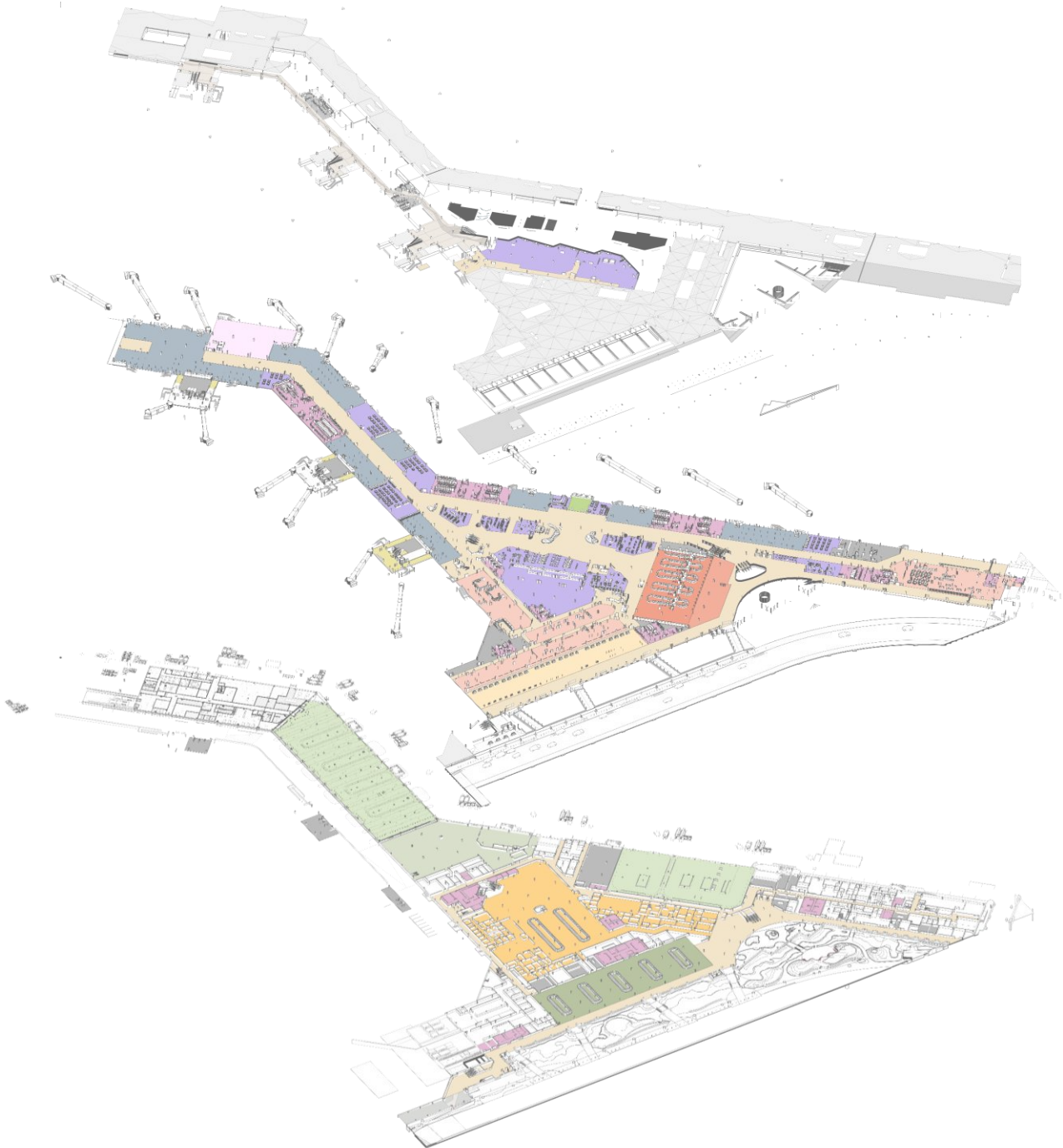
 DOMESTIC ARRIVAL FLOW



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|--|---|--|
|  Airline Support |  Concession Storage |  SSCP QUEUE |
|  Airport Support |  Holdrooms |  SSCP/TSA |
|  Amenity |  Immigration/Customs |  Sterile Corridor/Gatehouse |
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|  Circulation |  Open To Below | |
|  Concession |  Restrooms | |

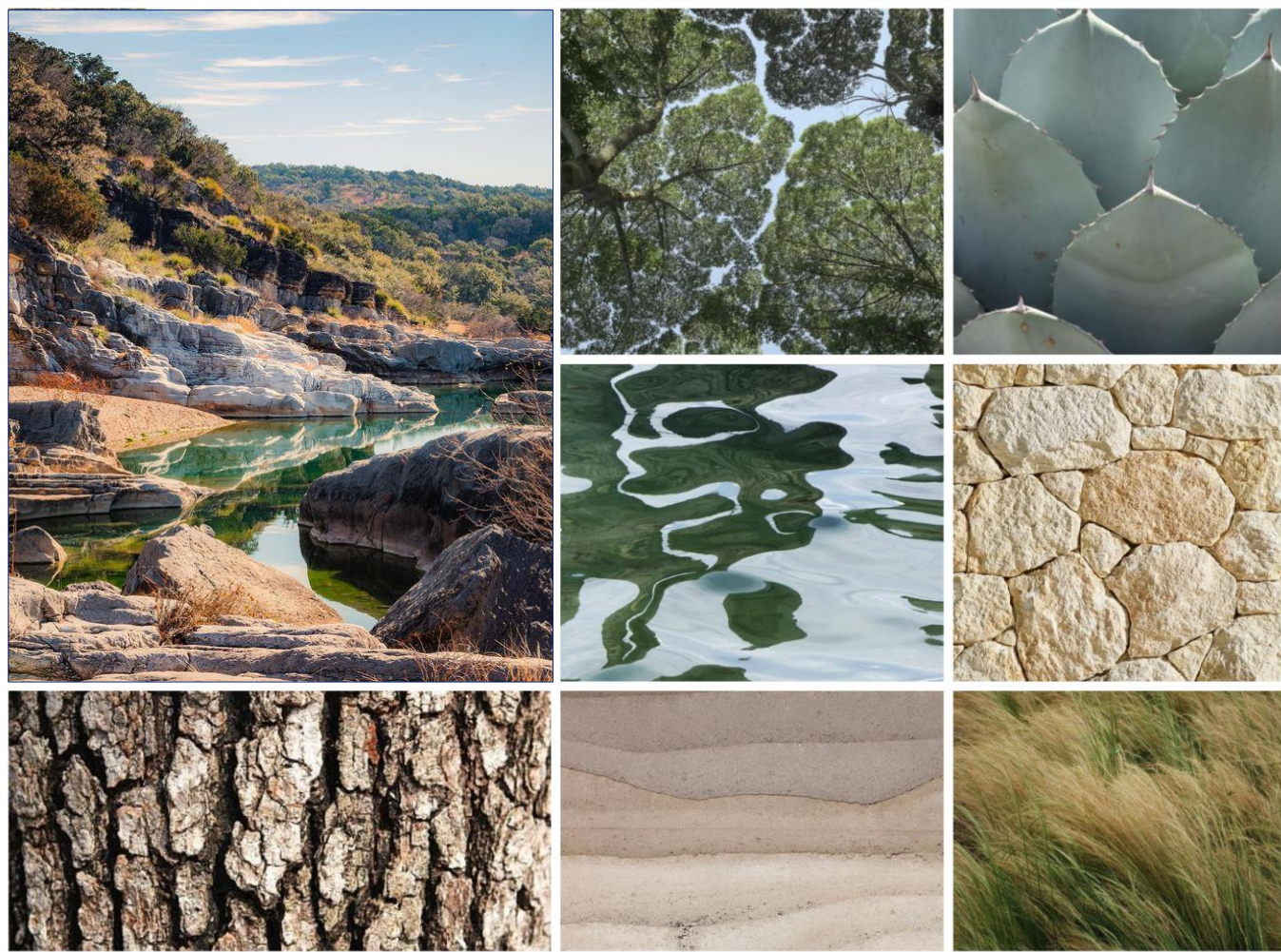
PASSENGER FLOW

- MIXED DEPARTURE FLOW
- DOMESTIC ARRIVAL FLOW
- INTERNATIONAL ARRIVAL FLOW

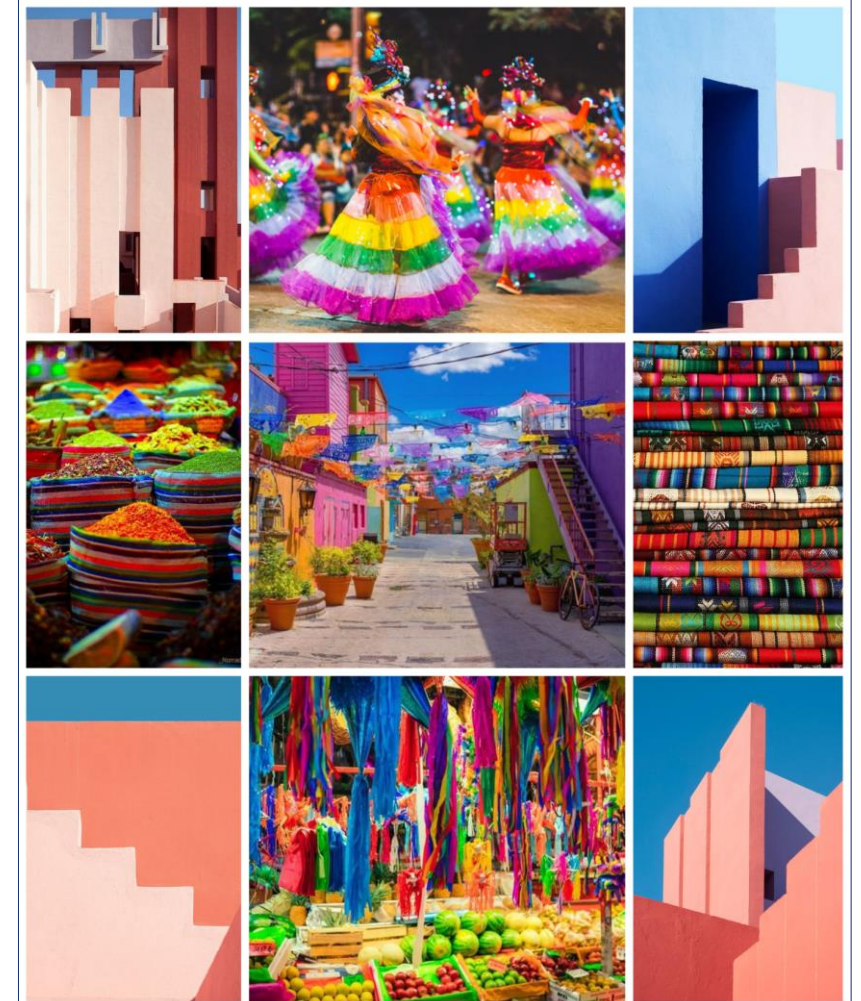


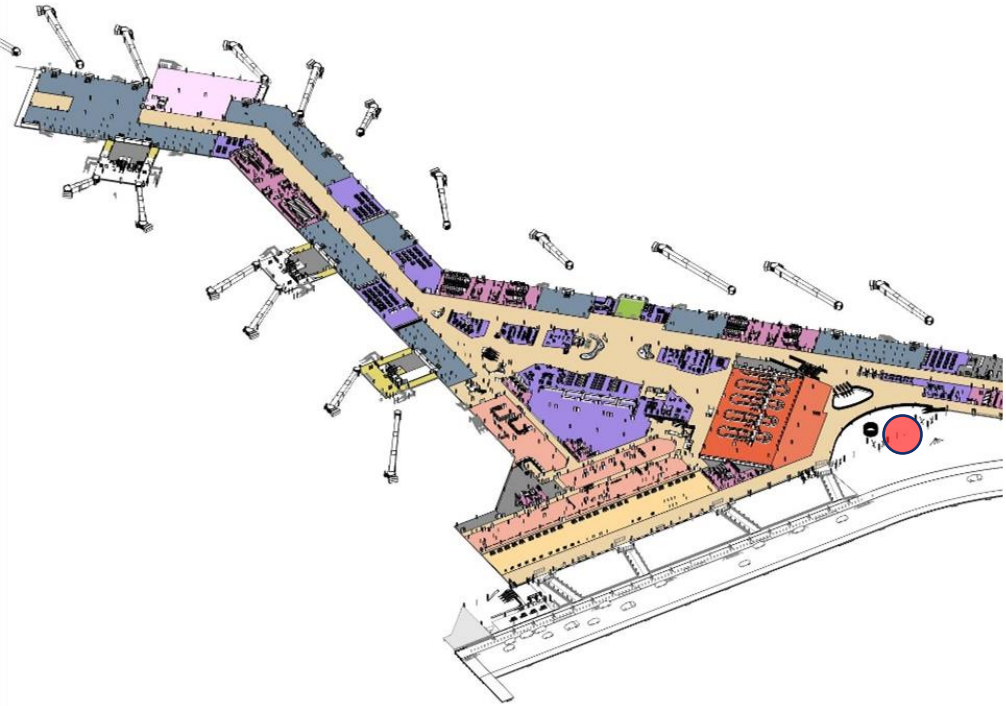
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|--|---|--|
| Airline Support | Concession Storage | SSCP QUEUE |
| Airport Support | Holdrooms | SSCP/TSA |
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| BHS | MEP/IT | Ticketing Hall |
| Circulation | Open To Below | |
| Concession | Restrooms | |

NEUTRAL MATERIALITY & COLOR INSPIRED BY CENTRAL TEXAS LANDSCAPES

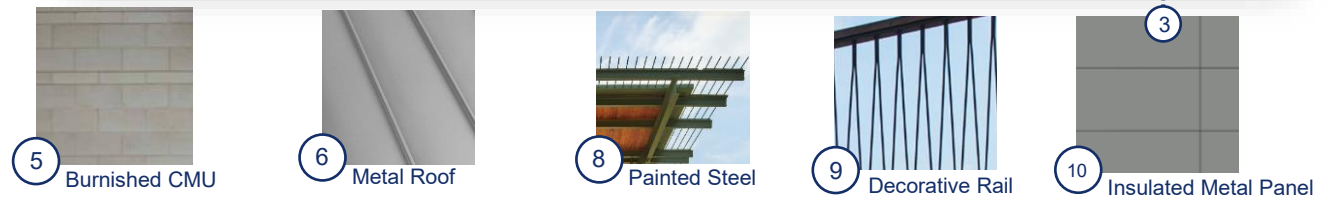
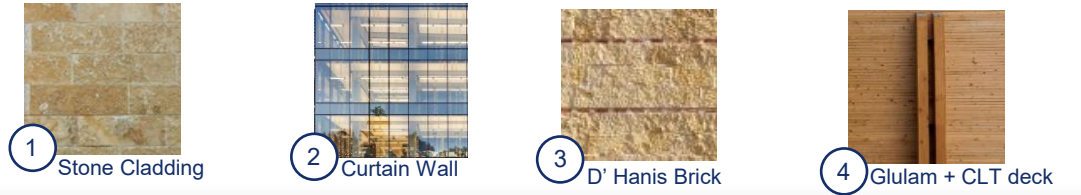


VIBRANT MATERIALITY & COLOR INSPIRED BY SAN ANTONIO CULTURE & MERCADO EXPERIENCE





Departures Level

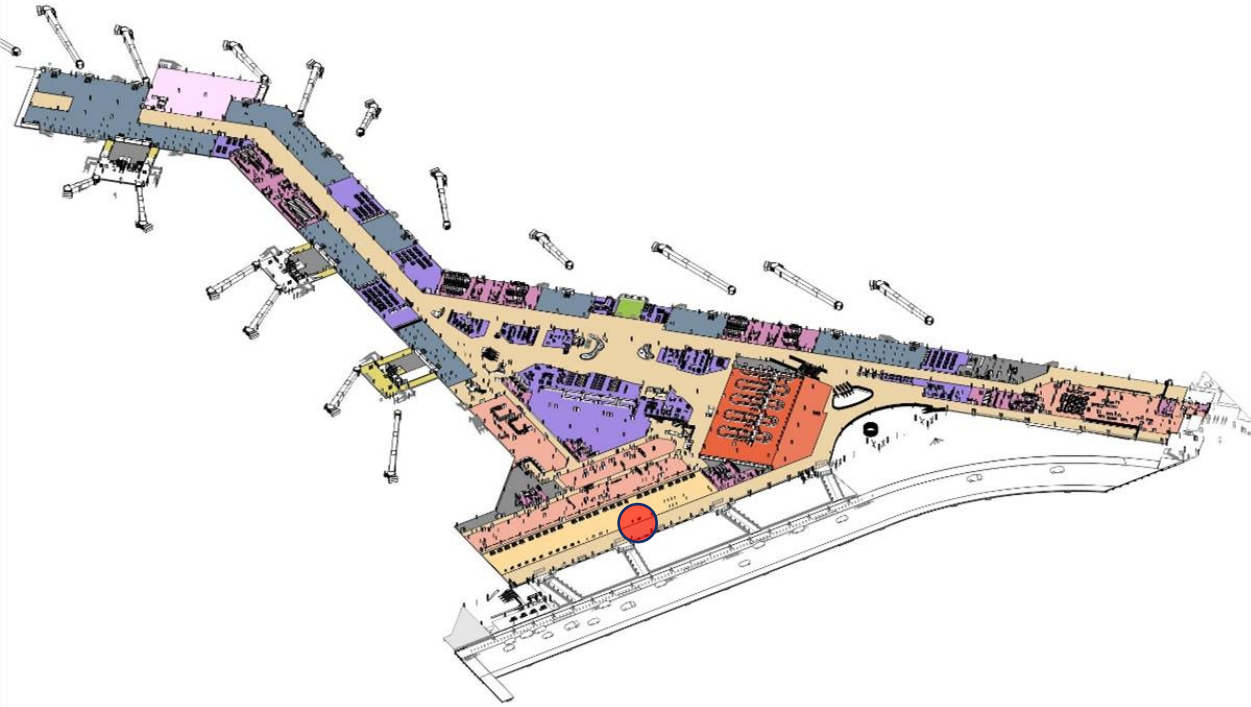


INTERIOR MATERIALS

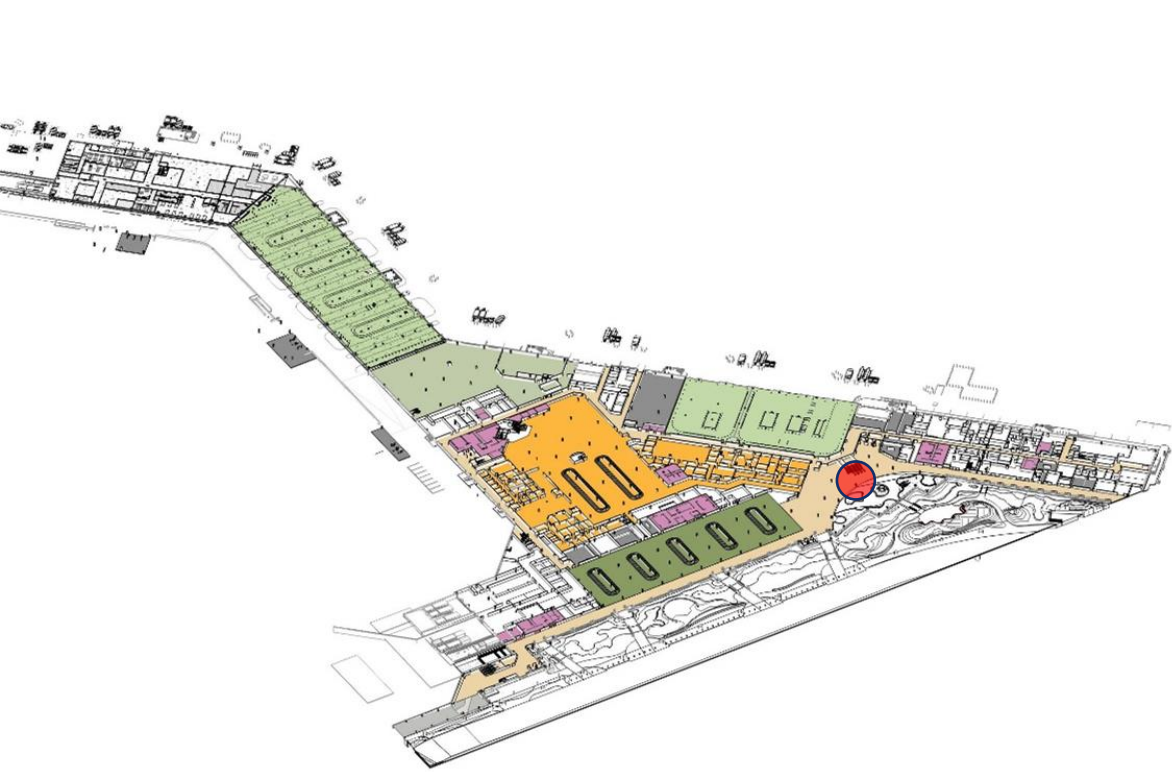




TICKET HALL



Departures Level



Arrivals Level



Retama (*Parkinsonia aculeata*)



Cedar Elm (*Ulmus crassifolia*)



Anacacho Orchid (*Rauhinia congesta*)

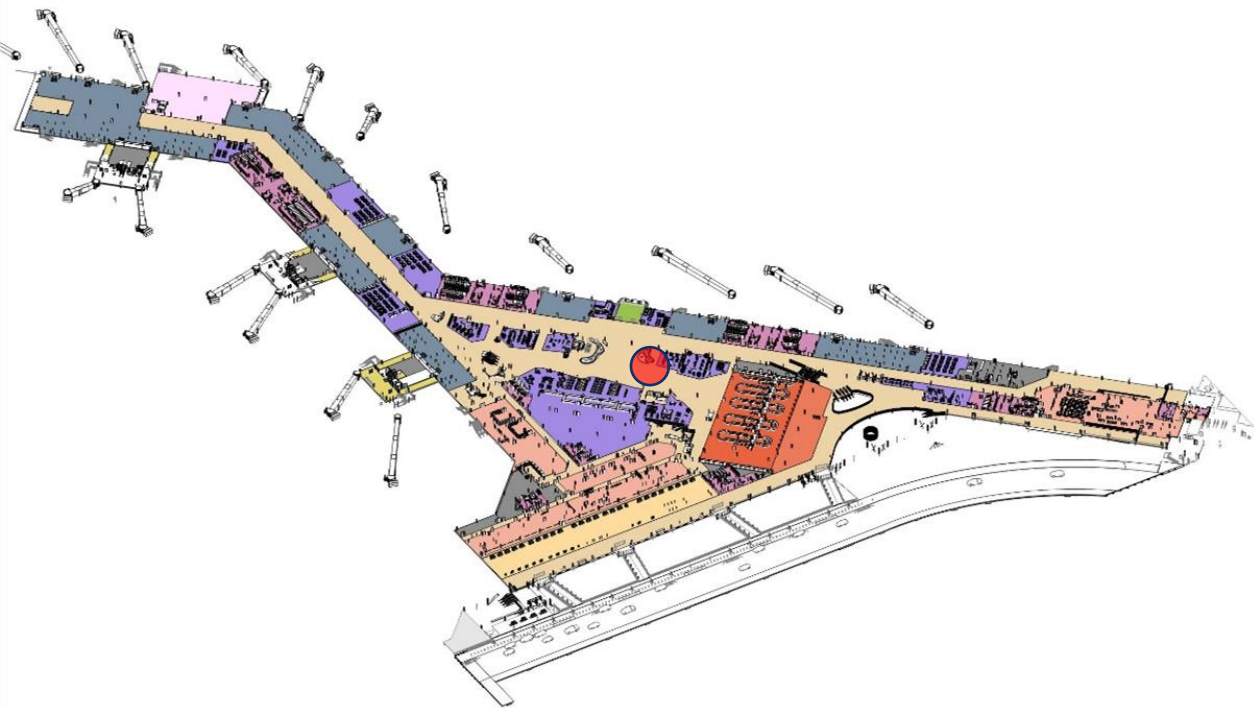


Mtain Laurel (*Sophora secundiflora*)



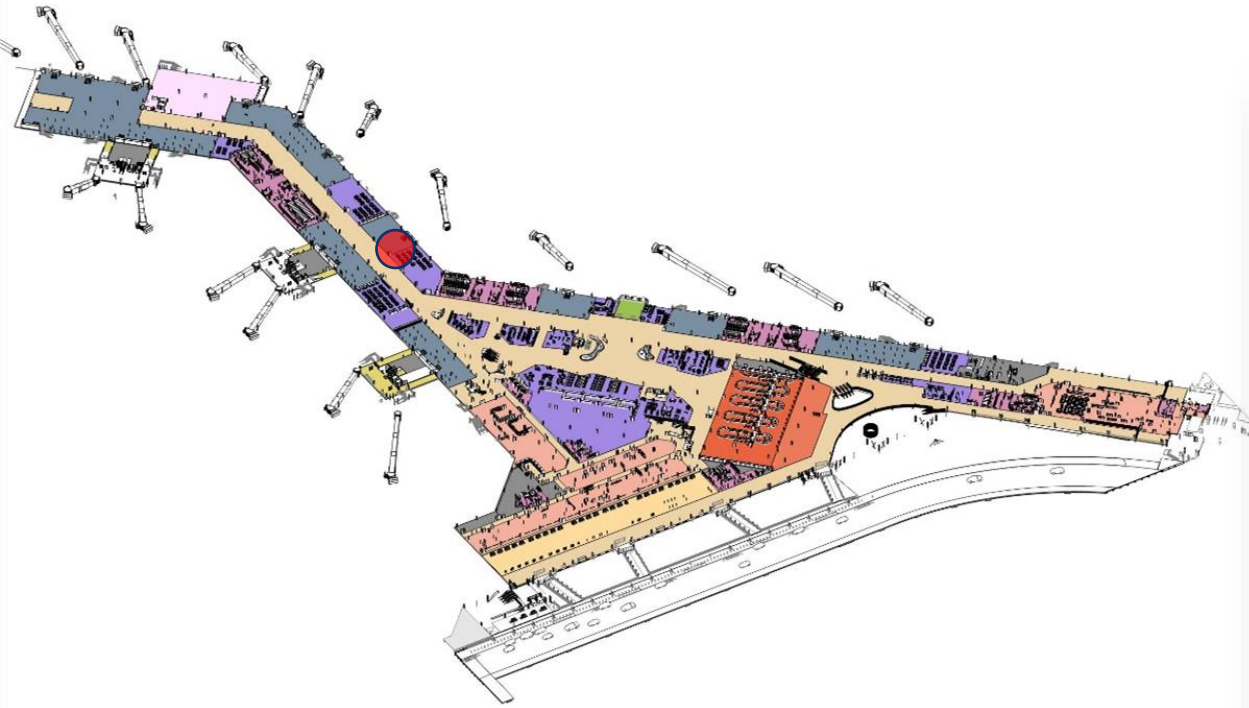
Bald Cypress (*Taxodium distichum*)

SAAS TX PRW
Website Note: Products Image Not Depicted By Website



Departures Level





Departures Level

The background is a solid dark blue color. On the left side, there are several light blue silhouettes of airplanes in flight, arranged in a roughly vertical column. Interspersed among these are numerous light blue dots of varying sizes, some of which are arranged in a curved, dotted line that starts near the top left and curves downwards towards the center.

Existing Concession Program



Existing Concession Program Results, 2025

Category	Sq. Ft.	Sales (\$mm)	Sales per Enplanement	Sales per Sq. Ft.
TERMINAL A				
Food Service	16,409	28.4 mm	\$ 5.29	\$1,729
Retail	6,756	13.2 mm	\$ 2.46	\$1,949
Duty Free	1,688	1.9 mm	\$ 0.36	\$1,127
Terminal A Total	24,853	43.4 mm	\$ 8.10	\$1,748
TERMINAL B				
Food Service	7,350	14.4 mm	\$ 2.68	\$1,955
Retail	1,679	5.2 mm	\$ 0.97	\$3,088
Terminal B Total	9,029	19.6 mm	\$ 3.65	\$2,165

2025 Enplanements: 5.4 million



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Terminal C Concession Program Overview

Concession Program Goals



GOALS FOR CONCESSIONS PROGRAM

- 1

CREATE AN ENHANCED “SENSE OF PLACE”
To showcase San Antonio/Hill Country as a premier destination.
- 2

ACHIEVE AN EXCEPTIONAL EXPERIENCE
For passengers and visitors with innovative and unique concepts.
- 3

OPTIMIZE NON-AIRLINE REVENUE
Allows SAT to attract airlines.
- 4

PROVIDE MORE OPPORTUNITIES
For Small Business Enterprises (SBE).

Terminal C Plan – Departures Level



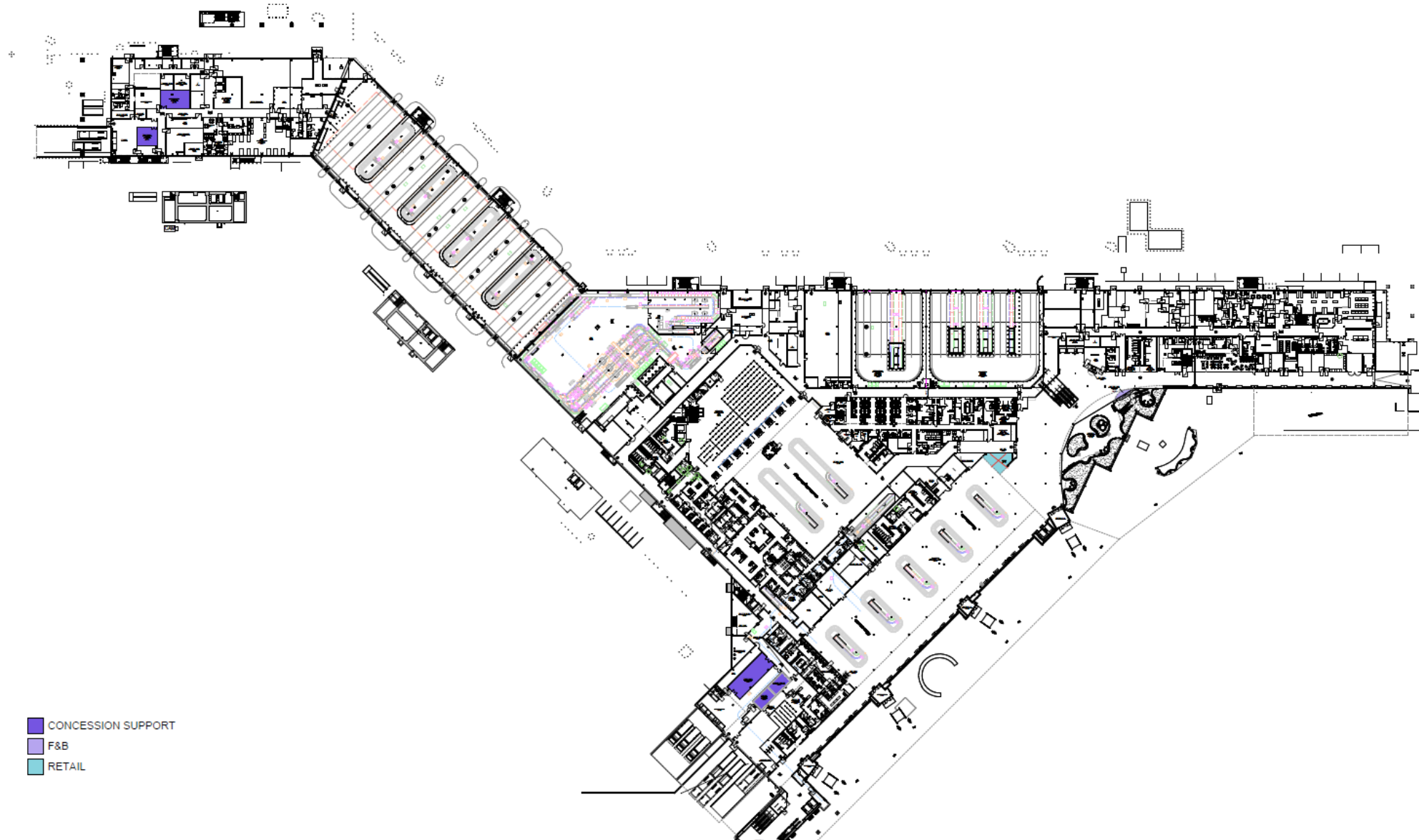
F&B - NEW TERMINAL		
Level	Name	Area
LEVEL 1 - ARRIVALS	COFFEE/ FOOD SERVICE	341 SF
LEVEL 2 - DEPARTURES	BAR	755 SF
LEVEL 2 - DEPARTURES	BAR	878 SF
LEVEL 2 - DEPARTURES	CAFE	950 SF
LEVEL 2 - DEPARTURES	CAFE KITCHEN	324 SF
LEVEL 2 - DEPARTURES	COFFEE	457 SF
LEVEL 2 - DEPARTURES	F&B	2559 SF
LEVEL 2 - DEPARTURES	FOOD HALL	5673 SF
LEVEL 2 - DEPARTURES	GOURMET MARKET	3451 SF
LEVEL 2 - DEPARTURES	GOURMET MARKET KITCHEN	601 SF
LEVEL 2 - DEPARTURES	GRAB & GO	918 SF
LEVEL 2 - DEPARTURES	KITCHEN	329 SF
LEVEL 2 - DEPARTURES	KITCHEN	340 SF
LEVEL 2 - DEPARTURES	KITCHEN	479 SF
LEVEL 2 - DEPARTURES	KITCHEN	1004 SF
LEVEL 2 - DEPARTURES	KITCHEN	967 SF
LEVEL 2 - DEPARTURES	KITCHEN	1152 SF
LEVEL 2 - DEPARTURES	QUICK SERVICE KITCHEN	512 SF
LEVEL 2 - DEPARTURES	QUICK SERVICE KITCHEN	563 SF
LEVEL 2 - DEPARTURES	QUICK SERVICE KITCHEN	487 SF
LEVEL 2 - DEPARTURES	QUICK SERVICE KITCHEN	420 SF
LEVEL 2 - DEPARTURES	RESTAURANT	940 SF
LEVEL 2 - DEPARTURES	RESTAURANT	1755 SF
LEVEL 2 - DEPARTURES	RESTAURANT	3057 SF
LEVEL 2 - DEPARTURES	RESTAURANT	2392 SF
Grand total: 25		31243 SF

RETAIL - NEW TERMINAL		
Level	Name	Area
LEVEL 1 - ARRIVALS	NEWS	567 SF
LEVEL 2 - DEPARTURES	CONVENIENCE RETAIL	3339 SF
LEVEL 2 - DEPARTURES	DUTYFREE	1664 SF
LEVEL 2 - DEPARTURES	RETAIL	1629 SF
LEVEL 2 - DEPARTURES	RETAIL	959 SF
LEVEL 2 - DEPARTURES	RMU	113 SF
LEVEL 2 - DEPARTURES	RMU	79 SF
LEVEL 2 - DEPARTURES	RMU	79 SF
LEVEL 2 - DEPARTURES	SPECIALITY RETAIL	1302 SF
LEVEL 2 - DEPARTURES	SPECIALITY RETAIL	796 SF
LEVEL 2 - DEPARTURES	SPECIALITY RETAIL	823 SF
LEVEL 2 - DEPARTURES	SPECIALITY RETAIL	1587 SF
LEVEL 2 - DEPARTURES	SPECIALITY RETAIL	763 SF
LEVEL 2 - DEPARTURES	SPECIALITY RETAIL	777 SF
LEVEL 2 - DEPARTURES	VENDING	114 SF
Grand total: 15		14693 SF

CONCESSION SUPPORT - NEW TERMINAL		
Level	Name	Area
LEVEL 1 - ARRIVALS	WALK-IN FREEZER	365 SF
LEVEL 1 - ARRIVALS	WALK-IN COOLER	363 SF
LEVEL 1 - ARRIVALS	TEMPORARY STORAGE	1237 SF
LEVEL 1.2 - ARRIVALS	TEMPORARY STORAGE	552 SF
LEVEL 1.2 - ARRIVALS	CONCESSION STORAGE	783 SF
LEVEL 2 - DEPARTURES	CONCESSION STORAGE	8088 SF
LEVEL 2 - DEPARTURES	DUTY FREE BONDED STORAGE	420 SF
Grand total: 7		11808 SF

- AIRLINE LOUNGE
- CONCESSION SUPPORT
- F&B
- FUTURE RETAIL
- RETAIL

Terminal C Plan – Arrivals Level



- CONCESSION SUPPORT
- F&B
- RETAIL

Concession Program Target Concepts



Bar with Food



Gourmet Coffee



Café



Quick Service



Gourmet Market



Casual Dining



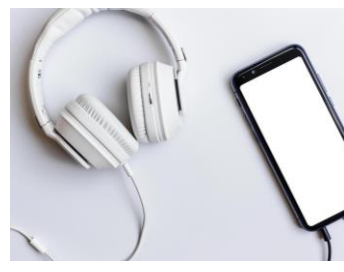
Duty Free



Gift Shop



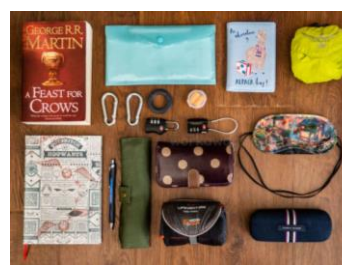
Personal Care



Tech Retail



Bookstore



Travel Essentials

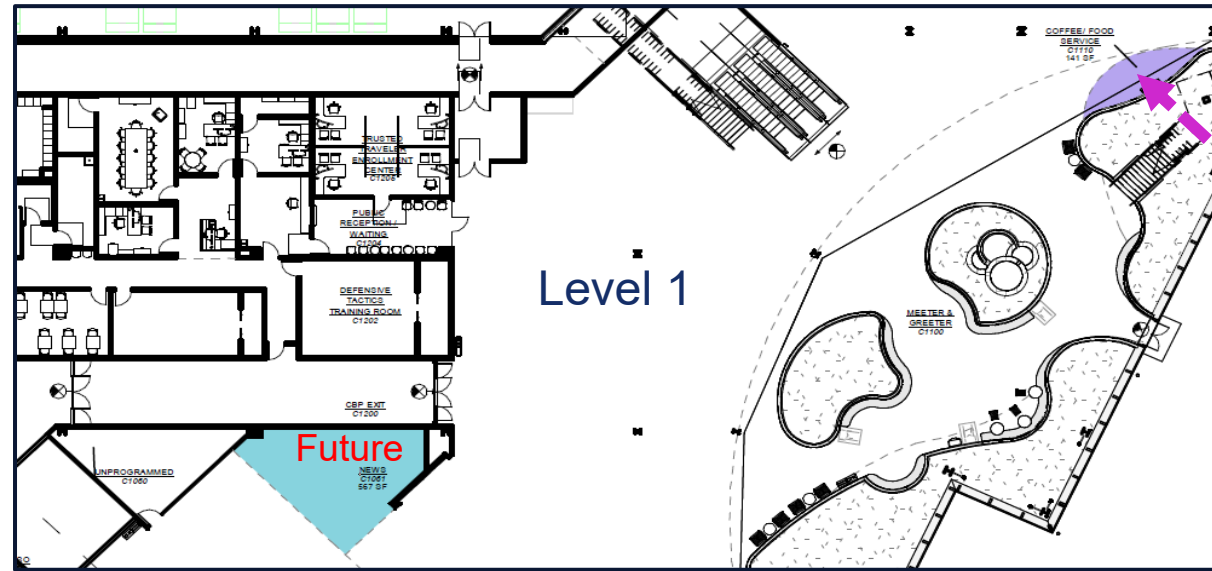


Accessories



Automated Retail

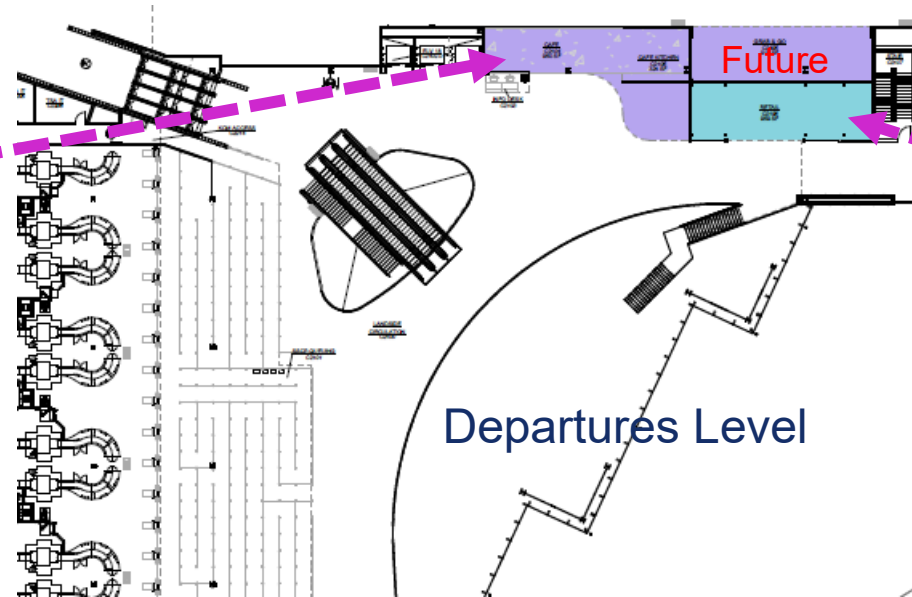
Pre-Security Concessions



C1110 Gourmet Coffee
141 sq. ft.



C2104 Café
1,274 sq. ft.



C2106 Travel Essentials
959 sq. ft.

Mercado Concessions – Food Service



C2529 Gourmet Coffee
457 sq. ft.



C2390 Gourmet Market
4,252 sq. ft.



C2505 Local Bar with Food
1,180 sq. ft.



C2380 Food Hall
(partially local)
7,654 sq. ft.

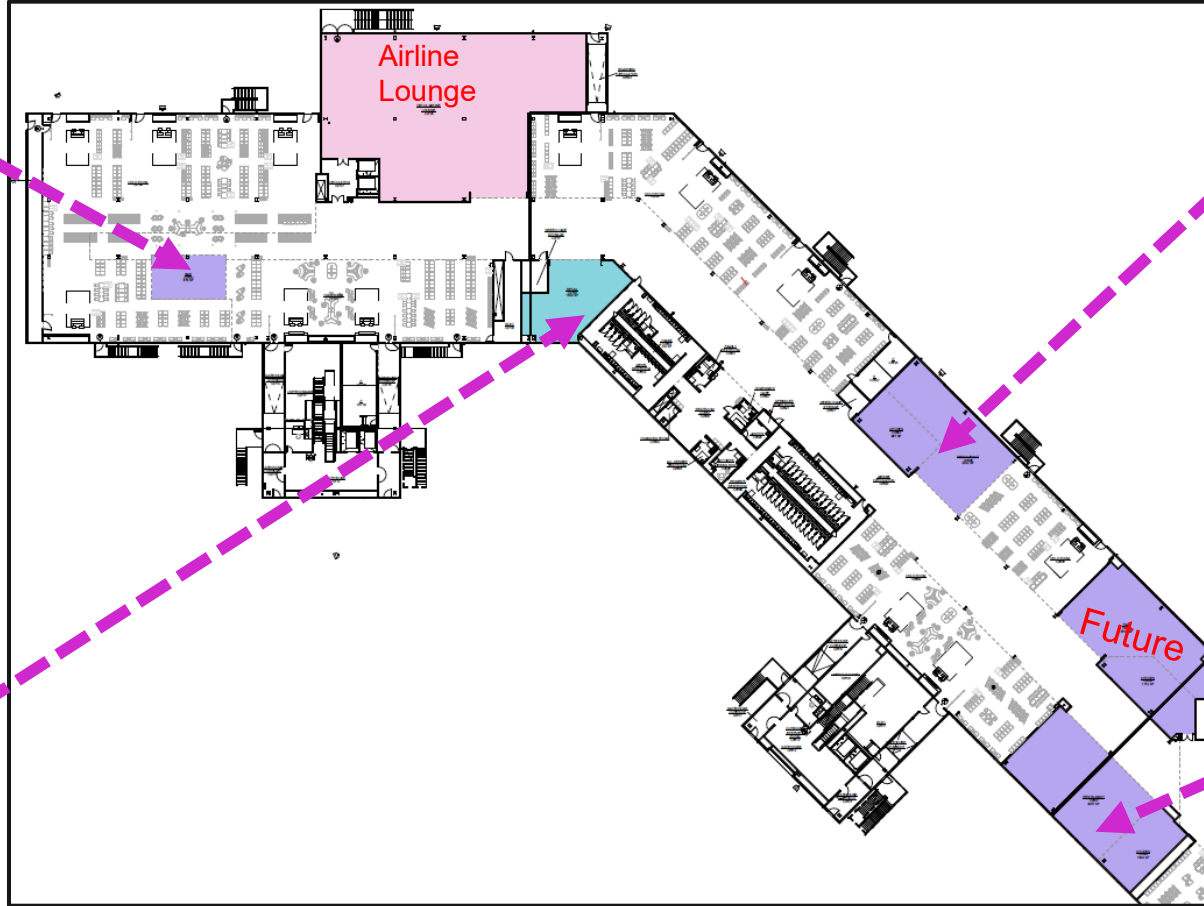
North Concourse Concessions



C2702 Bar with Food
878 sq. ft.



C2730 Travel Essentials
1,629 sq. ft.



C2606 Bar with Food and Coffee
3,359 sq. ft.



C2601 Local Casual Dining
4,061 sq. ft.

Note: Inclusion as a sample concept does not constitute an endorsement.

Mercado Concessions – Retail



C2522 Duty Free/Duty Paid
1,664 sq. ft.



C2536 Tech Retail
763 sq. ft.



C2535 Gift Shop
1,587 sq. ft.



**C2523 Local Accessories and
C2324 Local Bookstore
OR
Multi-Brand Store**
798 sq. ft and 777 sq. ft.



C2370 Travel Essentials
3,339 sq. ft.



C2534 Personal Care
923 sq. ft.

Mercado Concessions – RMUs & Vending



Local Retail Merchandising Units (RMU):
 C2525 79 sq. ft.
 C2531 113 sq. ft.
 C2537 79 sq. ft.



C2406 Automated Retail
 114 sq. ft.

The background is a dark blue gradient. It features several light blue airplane silhouettes in flight, scattered across the frame. Additionally, there are numerous small, light blue dots of varying sizes, some of which form a faint, curved path or trail across the upper left portion of the image.

Operational Requirements and Key Agreement Terms



Hours of Operation:

- Concessions must be open 365 days per year with operating hours and staffing levels sufficient to support fluctuating passenger activity at the Airport
- Concessions in Terminal C will be required to open no later than the opening time of the Terminal C security checkpoint — TSA checkpoints currently open at 3:45 a.m.
- Concessionaires may be required to open earlier, or extend operating hours, or adjust staffing levels based on passenger demand, flight schedules, irregular operations, or special circumstances at the sole discretion of the City



Security: All employees must pass a TSA-mandated security background check and be properly badged



Consolidated Receiving and Distribution Center (CRDC):

Concessionaires will be obligated to pay their allocated costs associated with the CRDC operations and third-party services



Storage: Concession storage will be assigned by the Department of Aviation based on concession locations, concepts, and estimates sales volume. Restocking hours are scheduled by the City so that they do not conflict with peak traffic times or interrupt SAT operations. For deliveries, current operating hours are Sunday through Saturday from 5:00 a.m. to 3:00 p.m.



Customer Service: All employees must have customer service training to ensure that they can provide information and directions and represent the City and the Airport



Menus: All menus should offer options for children, healthy choices, and items to address various dietary restrictions



Ordering & Payment: Contactless ordering and payment options, including the implementation of technology to offer non-printed/paperless receipts



Packaging: Compostable food service ware and consumer-facing packaging, including utensils, straws, and to-go containers as well as bags made from recyclable or compostable materials that can be recycled or composted



Local products: City desires meaningful local and regional consideration in the purchase of food service and retail products and supplies

Concession Rent: Concessionaire will pay to the City the greater of the following on a monthly basis:

- **Minimum Annual Guarantee (MAG):** Minimum amount of rent that will be paid annually
 - MAG will be set by the City for the First Full Fiscal Year of the Term
 - Concessionaire must pay one-twelfth of the MAG on the 1st of each month
- **Percentage Rent:** Rent based on a percentage of Gross Receipts
 - Percentage rent will be proposed as a fixed percentage or a tiered rent structure that increases with sales volume
 - A higher percentage rent must be paid on alcoholic beverages than on food and non-alcoholic beverages
 - The City is under no obligation to accept the highest percentage rent proposed

Key Agreement Terms

- ✓ **Minimum Initial Investment:** A minimum capital investment per square foot will be set in the RFP
- ✓ **Minimum Midterm Reinvestment:** 15% of initial investment amount
- ✓ **Marketing Fund:** A contribution of 0.5% of gross receipts will be required with the monthly rent payment
- ✓ **Pricing Policy:** Street plus 10%
- ✓ **Tenant Design Guidelines:** Terminal C guidelines must be followed for all unit designs

The background features a dark blue gradient with a pattern of light blue dots and airplane silhouettes. The dots are arranged in a series of parallel, slightly curved lines that sweep across the frame from the top-left towards the bottom-right. Interspersed among these dots are several light blue silhouettes of commercial airplanes, also following the same general diagonal path. The overall effect is a sense of movement and connectivity.

Participation

Local Participation Opportunities



Prime Concessionaire

- Enters into contract with City
- Overall responsibility for capital investment, rental payments, and management



Sub-concessionaire

- Responsible for one or more units within a package
- Responsible for the capital investment, rental payments (through prime), and management



Joint Venture Partner

- Participates in all aspects of the contract and management to the extent of their ownership in the joint venture



Vendor/Contractor

- Brand Partner (license or franchise), Vendor/Supplier, Designer, Contractor



Local Themes

- While encouraged, local themes do not count as a LOCAL CONCEPT



Airport Concession Disadvantage Business Enterprise (ACDBE) Participation Approach

Current Participation Environment

- No ACDBE participation goals apply to this solicitation pursuant to the FAA Interim Final Rule (IFR). However, SAT continues to encourage outreach and engagement with:
 - currently certified ACDBE firms, and
 - firms seeking or undergoing ACDBE certification/reevaluation through Texas Unified Certification Program (TUCP)
- Participation remains voluntary and proposer-driven

SAT Available Resources

- SAT Small Business / ACDBE Program Office
 - Guidance on CUF, participation structuring, and compliance
- TUCP Directory
 - Identify certified ACDBE firms
 - <https://txdot.txdotcms.com/Default.asp>
- Industry Day & Networking Opportunities
 - Connect with potential partners
- Additional support available for:
 - Certification questions
 - Partnership development
 - Proposal readiness

- **Aviation Small Business Office (ASBO)**

 AviationSBO@sanantonio.gov

- Marisol Amador, (210) 207-3424 or Marisol.Amador@sanantonio.gov
- Barbara Patton, (210) 207-3592 or Barbara.Patton@sanantonio.gov
- Brenda Rodriguez, (210) 207-3808 or Brenda.Rodriguez2@sanantonio.gov
- Joseph Gonzales, (210) 207-3526 or Joseph.Gonzales2@sanantonio.gov

The background is a solid dark blue color. It features a series of light blue airplane silhouettes flying from the top-left towards the bottom-right. Interspersed among these are numerous light blue dots of varying sizes, some of which form a faint, curved path that follows the trajectory of the airplanes. The overall aesthetic is clean and modern, suggesting a path or process.

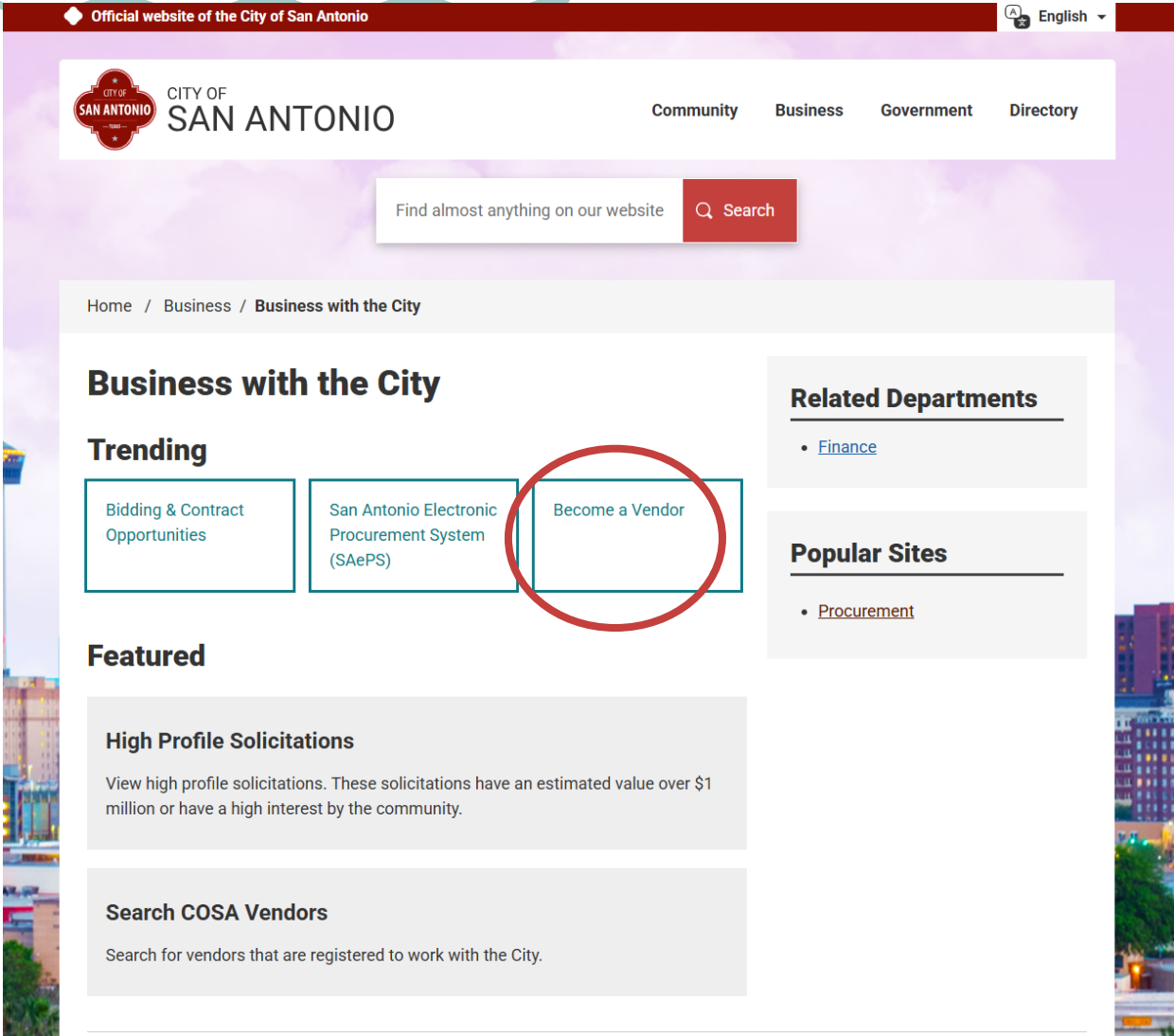
Procurement Process and Timeline

Vendor Registration

Register with the San Antonio e-Procurement System (SAePS)

sa.gov/Business/Business-with-the-City

Email: Vendors@sanantonio.gov
Call: 210-207-0118 (leave a message)



Vendor Registration



NIGP codes (product codes):

90534 Concessions, Airport: Food

90535 Concessions, Airport: Gift Shops, Specialties

Solicitation Type

METHOD	WHEN USED	BASIS of AWARD
RFP	Used for purchasing services such as consulting and marketing services, when factors other than price will be evaluated and the ability to negotiate is desired. Scoring criteria may include price, experience, qualifications, and proposed plan.	Weighted Evaluation Criteria Including price

Other RFP requirements

- General Information Form/References
- Contracts Disclosure Form & Litigation Disclosure Form
- Pricing/Compensation Schedule
- Small and Local Business & Supplier Participation
- Certificate of Interested Parties (Form 1295)
- Signature Page & Proposal Checklist

RFP Process via Prime Concessionaire Model



RFP posted

- SAePS emails notifications to registered vendors
- Posted on City Website

Restrictions on Communication in effect

- Assigned Procurement Specialist is the only City contact regarding RFP

Pre-Submittal Meeting and Site Visit

- Prime concessionaires and sub-concessionaires can attend

Vendor's can submit questions regarding the RFP

- Questions will be answered via an Addendum

RFP closes

- PRIME Concessionaires submit proposals electronically via SAePS.

Tentative RFP Timeline



Milestone	Target Date
RFP Release	June 23, 2026
Pre-Submittal Meeting	June 30, 2026
RFP Question Deadline	August 11, 2026
Proposal Due Date	September 23, 2026
Respondent Interviews	November 17-19, 2026
Contract Awards	January 2027

Submission Tips



- ✓ Tailor Submittals to Address Scope of Work
- ✓ Directly Address each Criteria Category
- ✓ Well-Organized as Outlined
- ✓ Professional in Format & Appearance
- ✓ Bullet Points, Graphs, Tables & Photos



Post-Award Process Timeline

Milestone	Target Timeframe
Concession unit designs & reviews; 30%, 60%, 90%	February – July 2027
Permit review	September – October 2027
Concession construction	November 2027 – May 2028
Testing and training	June 2028

**Terminal C
First Flight
June 30, 2028**



The background is a solid dark blue color. On the left side, there is a decorative pattern consisting of several light blue airplane silhouettes flying upwards and to the right. These silhouettes are scattered across the left half of the page. Additionally, there are numerous light blue dots of varying sizes scattered across the entire background, with a higher concentration on the left side, creating a starry or particle-like effect.

Closing Remarks