

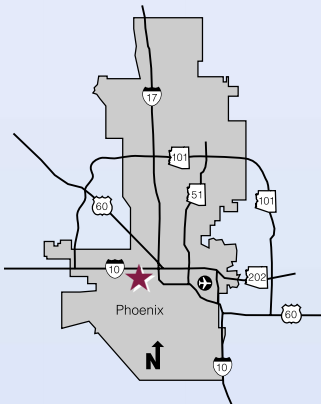


City of Phoenix Employment Center Profile

Southwest Phoenix

With convenient access to the growing urban freeway system and the interstate rail system, Southwest Phoenix offers employers a truly strategic business location and access to a young and growing labor force.

The Southwest Phoenix employment center extends south from McDowell Road to Broadway Road, and west from Interstate 17 to 75th Avenue.



- Strategic industrial sites along the interstate rails system and multiple interstate highways
- Young and growing labor force with a strong base of production and transportation workers
- Large inventory of industrial real estate at competitive lease rates

Labor Force Accessibility and Skills

Southwest Phoenix offers employers access to an abundant labor pool with a variety of skills. There are currently close to 300,000 workers within a 20-minute commute shed and more than 620,000 within a 30-minute commute shed.¹ The population and potential labor force within the 20-minute commute shed will grow by 16 percent by 2010.²

Within the 10-minute commute shed, employers have access to a high concentration of construction trades, transportation and production workers. Within a larger 30-minute commute shed, the labor pool includes a broad mix of management, sales, service, and clerical and administrative workers.

1. 2000 Census. 2. Maricopa Association of Governments, 1997.

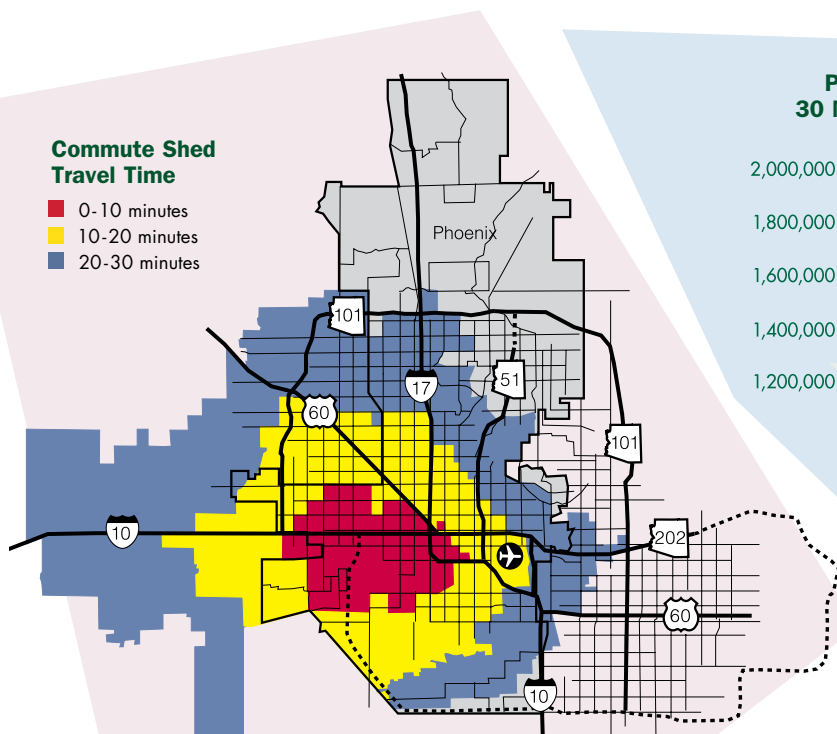
Employment by Occupation

Work Force	10 Min. Commute		20 Min. Commute		30 Min. Commute	
	Number	%	Number	%	Number	%
Management	3,878	5	23,519	8	70,783	11
Professional Specialty	5,692	8	33,364	12	99,495	16
Service	13,485	19	53,129	19	106,423	17
Sales	6,127	9	26,435	9	68,934	11
Clerical & Admin Support	12,224	17	50,020	18	112,895	18
Construction	14,671	20	47,873	17	82,662	13
Production	9,249	13	27,627	10	45,774	7
Trans./Material Mover	6,740	9	22,720	8	40,427	6
Total	72,066		284,687		627,393	

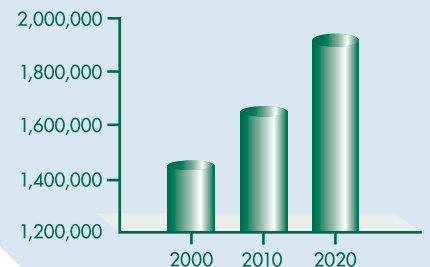
Source: Bureau of the Census, 2000.

Commuter Shed Travel Time

- 0-10 minutes
- 10-20 minutes
- 20-30 minutes



Projected Population 30 Minute Commute Shed



Year	Population
2000	1,447,144
2010	1,644,688
2020	1,921,114

Major Area Employers

Belden Communications Division
Swift Transportation Co., Inc.
Fleming Companies, Inc
Dolphin, Inc
Head-Penn Racquet Sports
Holsum Bakery, Inc.
CAVCO Industries, Inc.
AM-SAFE Commercial Products
Advantage Logistics
Target Distribution Center
Steris Laboratories

Source: Dun & Bradstreet Marketplace, 2002; Maricopa County Rideshare Survey, 2000; Applied Economics, 2002.

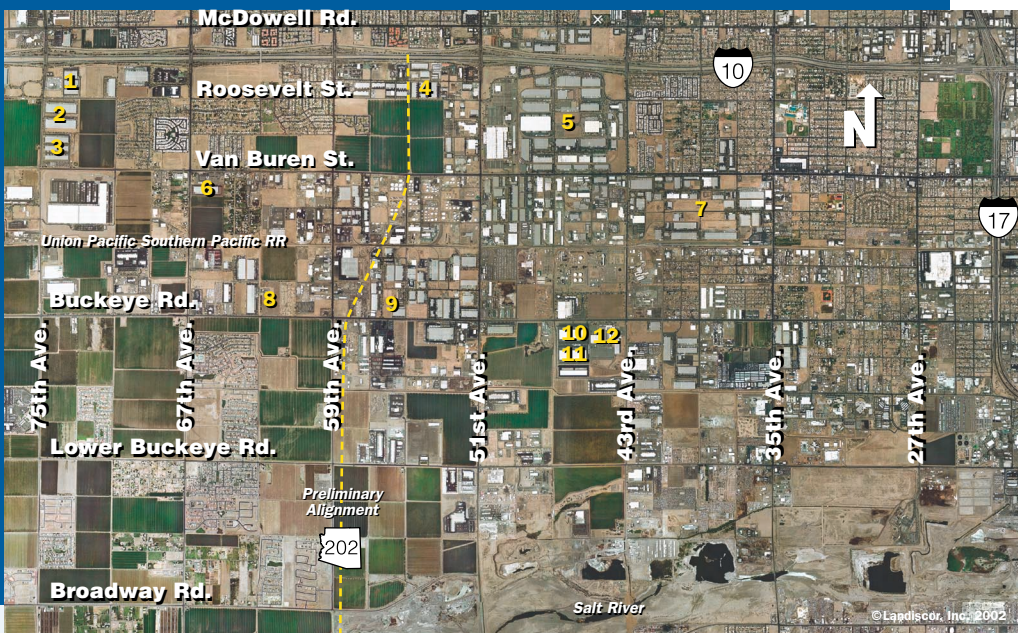
Industry

Communication Services
Trucking Terminal
Wholesale Groceries
Steel Manufacturing
Sporting Goods
Baked Goods
Mobile Homes
Fabricated Textile Products
Logistics Services
Distribution
Pharmaceuticals

Sites and Buildings

The Southwest Phoenix employment center is home to a large inventory of industrial and distribution space. This inventory of over 27 million square feet enables businesses in the area to enjoy prime locations and take advantage of competitive lease rates. Since 1999, more than 3 million square feet of new industrial space has been added to the area.³ Some of the major employers in Southwest Phoenix include Belden Communications, Head-Penn Racquet Sports, CAVCO Industries, and Steris Laboratories.

3. CoStar Realty Information, Inc.



Major Industrial Parks

- 1. 75th & I-10 Commerce Plex**
258,769 sq. ft.
- 2. Valley West Distribution Center**
646,692 sq. ft.
- 3. Mack Enterprise Center**
407,205 sq. ft.
- 4. Coronado Commerce Plex**
126,140 sq. ft.
- 5. Papago West**
414,047 sq. ft.
- 6. R & M Black Building**
200,000 sq. ft.
- 7. Rey West Commerce Center**
396,605 sq. ft.
- 8. Irwin Pasternack Building**
325,000 sq. ft.
- 9. Freeport Industrial Center**
104,000 sq. ft.
- 10. Buzz Oates Distribution Center #1**
331,398 sq. ft.
- 11. Buzz Oates Distribution Center #2**
331,398 sq. ft.
- 12. Metro South Corp. Park**
536,807 sq. ft.

Source: CoStar Realty Information, November, 2002.

Infrastructure

Excellent freeway and rail access makes the Southwest Phoenix employment center attractive to many manufacturing and warehousing/distribution operations. Close proximity to Interstate 10 provides easy access to suppliers and customers in Southern California markets. Interstate 17 borders the area on the east is the primary route to downtown Phoenix and north to Flagstaff, where it intersects Interstate 40. In addition, Loop 101 connects Southwest Phoenix to North Phoenix.

Businesses that require air service have easy access to Phoenix Sky Harbor International Airport within 15 to 20 minutes from the Southwest Phoenix employment center. Sky Harbor is one of the country's busiest airports, with more than 35 million passengers passing through the facility annually. The airport is served by 18 major airlines and 3 commuter airlines, and offers service to 105 cities in the U.S. and around the world. There are more than 600 daily domestic non-stop flights from Phoenix and international non-stop destinations include several cities in Mexico, Canada and Europe. Phoenix is the headquarters for America West Airlines and a major operations hub for Southwest Airlines.

The Southwest Phoenix employment center enjoys a modern, reliable telecommunications infrastructure that is supported by at least 6 telecommunications/fiber optic providers. Advanced fiber optic networks in the area enable these providers to offer a full spectrum of high-speed data services. Local exchange carriers in the Southwest Phoenix area include Qwest and Cox Communications.

Both Arizona Public Service and Salt River Project provide electrical power in the area. Three-phase power is available throughout the area, and for businesses requiring additional reliability, advanced network systems are available that provide redundant feeds from various substations. Southwest Gas provides natural gas service to the area via lines that have been laid in a web design, which permits easy extension of service to new facilities.

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