AREA
Albuquerque Regional Economic Alliance

REGIONAL ECONOMIC DEVELOMENT UPDATE

Presentation to the Greater
Albuquerque Association of Realtors

November 4, 2026



Introduction

AREA is the regional economic development organization representing Greater Albuquerque, New Mexico

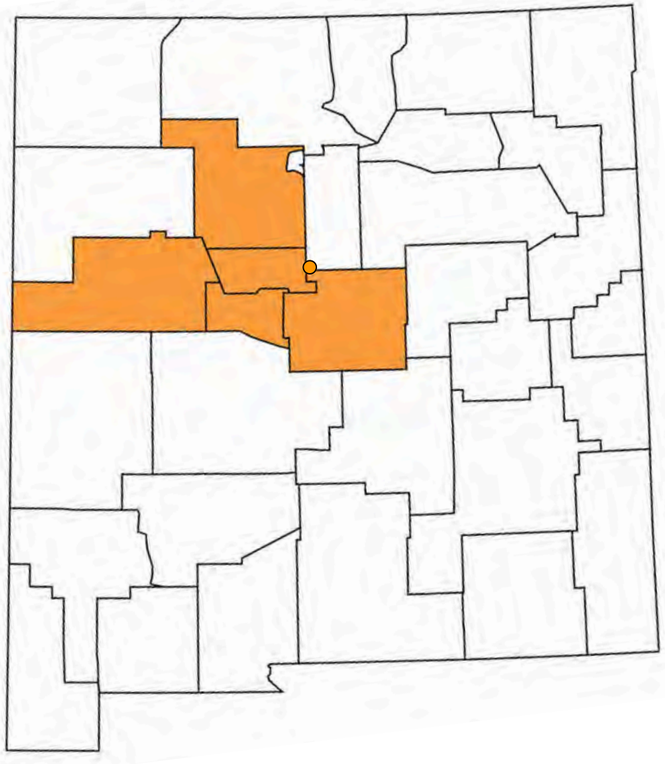
Our Mission

AREA leads and executes strategies designed to grow and diversify the economic base of the greater Albuquerque region, creating a prosperous, diverse and inclusive economy and elevating the standard of living for all

Key Takeaways

- 501c3 Non-Profit
- Public/Private Partnership
- Servicing Sandoval, Valencia, Torrance, Bernalillo and Cibola Counties.
- 40+ member board of directors + advisory councils

Our Region





2026 AREA BOARD OF DIRECTORS

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DIAMOND

PLATINUM

THE UNIVERSITY OF NEW MEXICO

GOLD CONTRIBUTORS

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SILVER CONTRIBUTORS

Bohannan Huston, Inc • CBRE Inc. Albuquerque • Comcast • Dekker • Garrett Development Corporation • Klinger Constructors, LLC KPMG LLP • Lovelace Health System • Maestas Development Group • Manpower of New Mexico • PNC Bank • Sandia National Laboratories • TriCore Reference Laboratories

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Albuquerque Academy • ARCO Design/Build• Central New Mexico Community College (CNM) • Century Sign Builders Deloitte Consulting LLP • Delta Dental • Duke City Commercial LLC • Eye Associates of New Mexico • FBT Architects • Greater Albuquerque Association of REALTORS® • Franken Construction • HB Construction, Inc. • Homewise Hub International • JP Morgan Chase • Meta • Modrall Sperling • Page Think • Rodey Law Firm • Sunny505 • Swire Coca Cola • Terracon Albuquerque • Titan Development • UNM Health System • Verus Research • Yearout Mechanical, LLC

COMMUNITY PARTNERS

City of Albuquerque • City of Belen • Bernalillo County • Cibola County • Town of Edgewood • Village of Los Lunas • City of Rio Communities • Sandoval County • Torrance County

Public Partners in Economic Development

EDD Economic Development Department

NEW MEXICO partnership

State-level assets and business support mechanisms drive opportunity and strengthens industry value propositions.

AREA
Albuquerque Regional Economic Alliance

Regional business identity drives opportunity generation and strengthens investment opportunities within targeted industries.

CITY OF BELEN THE HUB CITY STATE OF NEW MEXICO

TOWN OF EDGEWOOD 1999

City of Rio Communities

TORRANCE COUNTY EST. 1905 NEW MEXICO

ONE ALBUQUERQUE economic development

BERNALILLO COUNTY STATE OF NEW MEXICO

VILLAGE of LOS LUNAS INCORPORATED 1928 NEW MEXICO

SANDOVAL COUNTY STATE OF NEW MEXICO

CIBOLA COUNTY

Strong, unique, and distinctive community brands bolster the region's business identity are cornerstones to the region's value proposition.



Key Areas of Focus

Project Management

Confidentiality

RFP/RFI Coordination

Engaging Leads

Regional Value Propositions

Custom Research

Real Estate

Inward Investment and Existing Industry

Institutional Excellence

Economic Research

Competitive Analysis

Strategic Initiatives

Systems Improvement

Departmental Integration

Database Management

Partner Support

Connections

Custom Research

Supply and Demand

Industry Analysis

Occupational Analysis

Wage Analysis

Economic Impacts

Support functions

Departmental integration, database & collateral maintenance, CRM management

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AREA 1.0

Turning Momentum Into Durable Growth

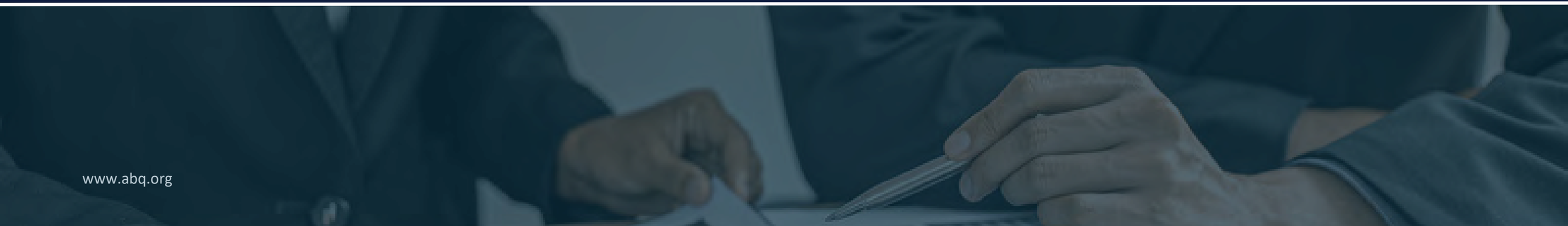
AREA 1.0 built the regional engine. AREA 2.0 connects it to a disciplined operating system for converting momentum into measurable growth.

www.abq.org



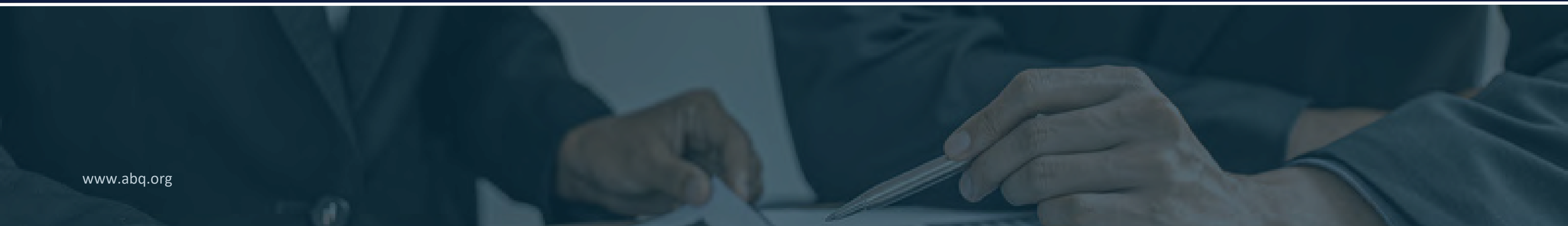
Setting the Stage: The 3 Discussion Arcs for Today's Discussion

WHERE WE HAVE BEEN	WHERE WE ARE TODAY	WHERE ARE WE GOING
The Foundation	The Momentum	The Vision



Setting the Stage: The 3 Discussion Arcs for Today's Discussion

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Through AREA 1.0, we've built a strong and trusted partnership, working collaboratively to attract investment, support expanding businesses, and create quality jobs. This shared commitment to a data-driven economic strategy is essential to sustaining New Mexico's momentum.

- Rob Black, Cabinet Secretary, Economic Development New Mexico

AREA 1.0

Regional Plan for Economic Growth and Resiliency

Our Ultimate Goal: To Move the Region to the Top 25% for Job Growth

Goal 1

Establish a national identity as a leading location for business

Role: Leader

Goal 2

Attract, Retain, and Align Talent

Role: Convener / Catalyst

Goal 3

Break Down Barriers to Competitiveness

Role: Convener / Catalyst

OUR MISSION

AREA leads and executes strategies designed to grow and diversify the economic base of the greater Albuquerque region, creating a prosperous, diverse and inclusive economy and elevating the standard of living for all.

AREA 1.0 RESULTS

Sustained Investment Works — The Numbers Are the Evidence

Five years of regional capacity investment moved Greater Albuquerque's trajectory. This is what it produced.

25+
Regional Committments

$1.9B
Announced Capital Investment

4,300+
Committed Direct Jobs

8,842
Total Modeled Jobs

$5.9 Billion
Construction: $3.3 B - Operations: $2.6 B
Total Economic Output

2nd
Quartile, U.S. Metro Job Growth

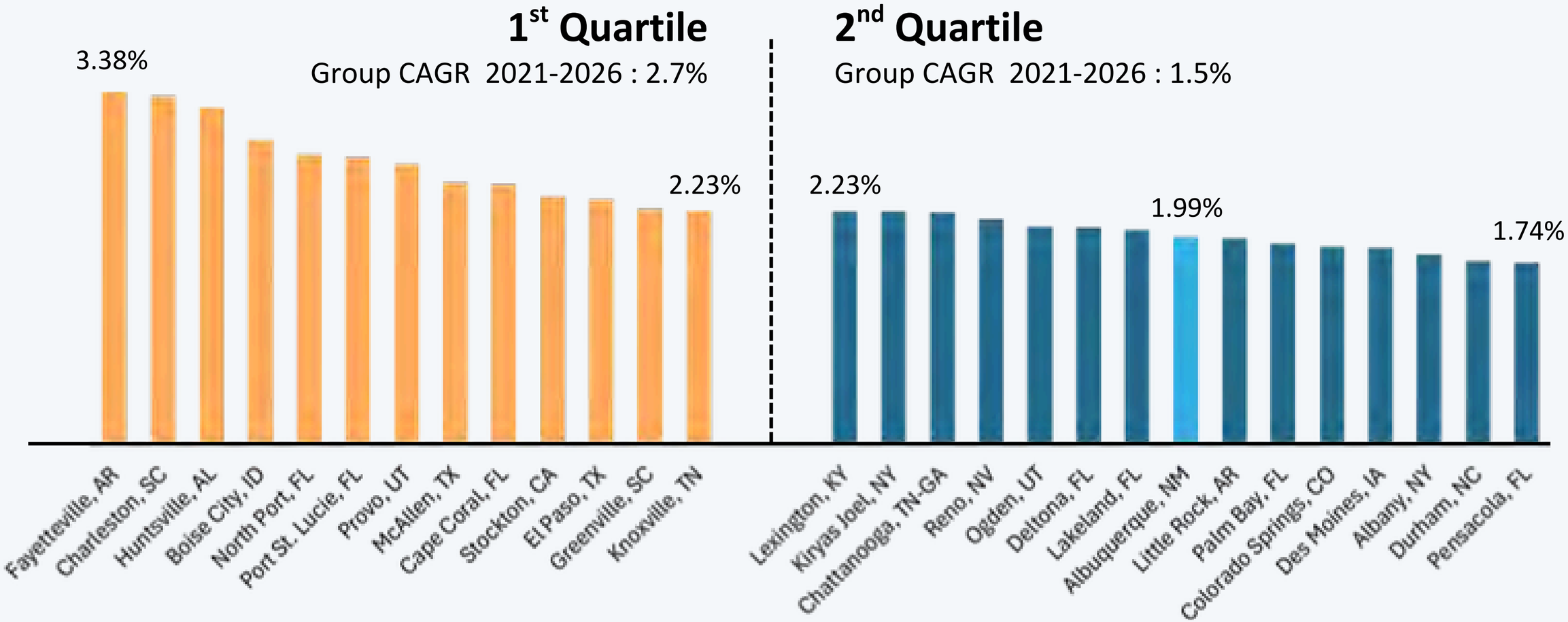
AREA 1.0 RESULTS

Annual Return on Investment | Direct-impact ROI by year, on a $1.5M annual budget

2022	2023	2024	2025	2026
413:1	**509:1**	**376:1**	**560:1**	**570:1**
Regional ROI	Regional ROI	Regional ROI	Regional ROI	Regional ROI
Jobs Goal 1,200	Jobs Goal 1,250	Jobs Goal 1,500	Jobs Goal 1,500	Jobs Goal 1,500
Jobs Announced 875	Jobs Announced 782	Jobs Announced 1,354	Jobs Announced 2,270	Jobs Announced 872
Jobs Actual 325	**Jobs Actual 772**	**Jobs Actual 254**	**Jobs Actual 2,270**	**Jobs Actual 872**
CapX Goal $52 M	CapX Goal $175 M	CapX Goal $180 M	CapX Goal $175 M	CapX Goal $200 M
CapX Announced $2.5 B	CapX Announced $165 M	CapX Announced $1.5 B	CapX Announced $1.1 B	CapX Announced $103 M
CapX Actual $115 M	**CapX Actual $165 M**	**CapX Actual $581 M**	**CapX Actual $981 M**	**CapX Actual $103 M**

AREA 1.0 RESULTS

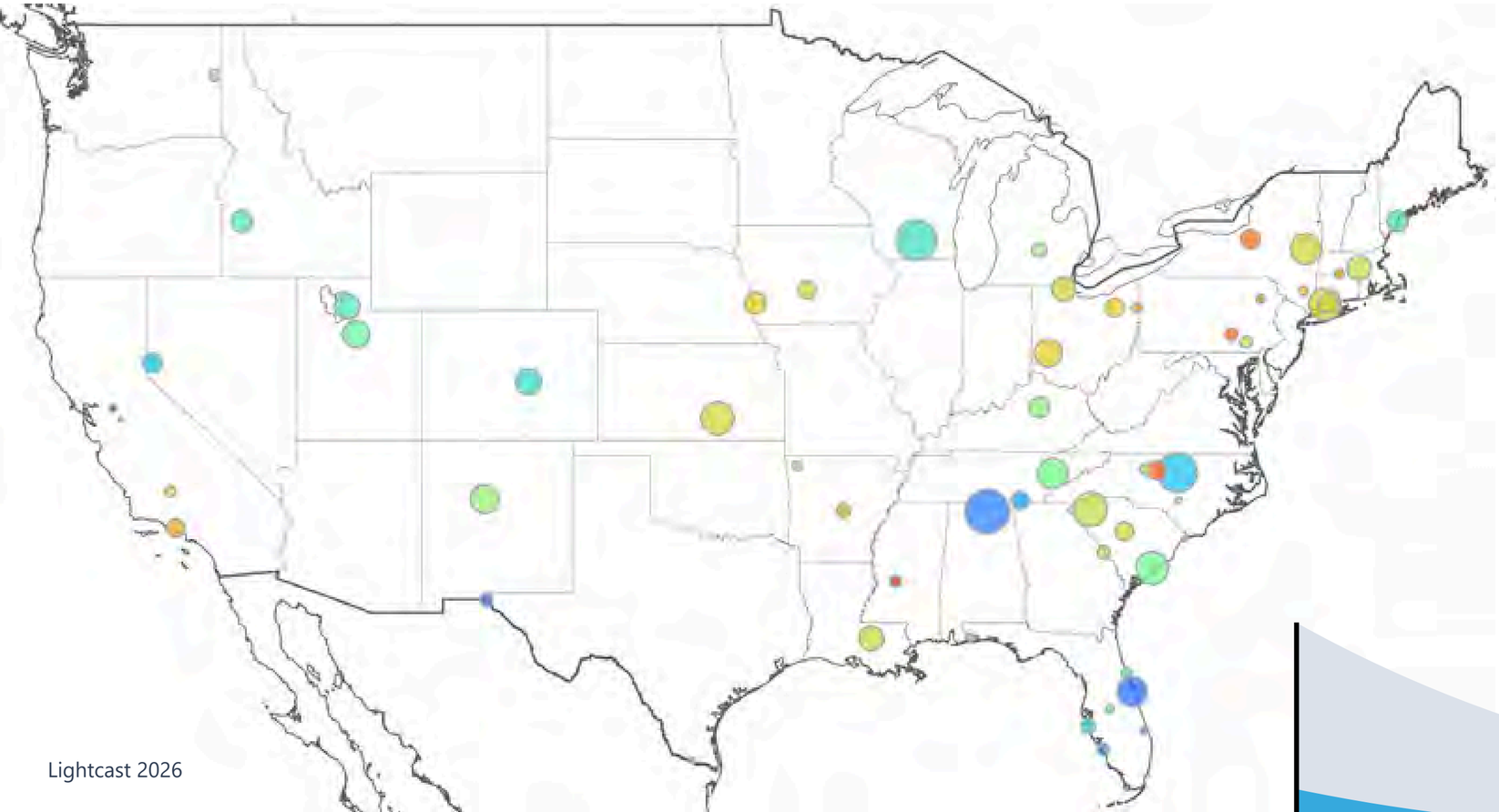
Five years of regional capacity investment moved Greater Albuquerque's trajectory. This is what it produced.



Nationwide Distribution

Advanced Industry Presence and Growth

MSAs 500K-1M in population



Why is it important?
Characterized by its deep involvement with technology, R&D, and STEM, the dynamism within advanced industries will be a central component to our future economy and offer pathways to supporting innovative, inclusive, and sustainable growth.

Comparative Rank
In 2025, Greater ABQ ranked 10th nationwide for the count of jobs within advanced industries **(43,210)** compared to metro areas 500k to 1m in population. From 2020 to 2025, these industries expanded 9%, further deepening our region's identity as a location for advanced industries growth and investment

Advanced Industries

in Greater Albuquerque

Top performing advanced industries in Greater Albuquerque

Industry Description	2020 Jobs	2025 Jobs	% Change
Scientific Research and Development Services	14,822	15,616	5%
Architectural, Engineering, and Related Services	4,555	5,071	11%
Semiconductor and Electronic Component	3,678	4,984	36%
Computer Systems Design and Related Services	3,441	4,404	28%
Management, Scientific, and Technical Consulting	2,424	3,202	32%
Medical and Diagnostic Laboratories	1,845	1,967	7%
Electric Power Generation, Transmission and	703	770	9%
Computing Infrastructure Providers, Data Processing	333	554	66%
Aerospace Product and Parts Manufacturing	393	445	13%
Software Publishers	184	342	86%
Regional Total	**32,380**	**37,360**	**15%**

Total Advanced Industry Jobs

37,360

Jobs

2025

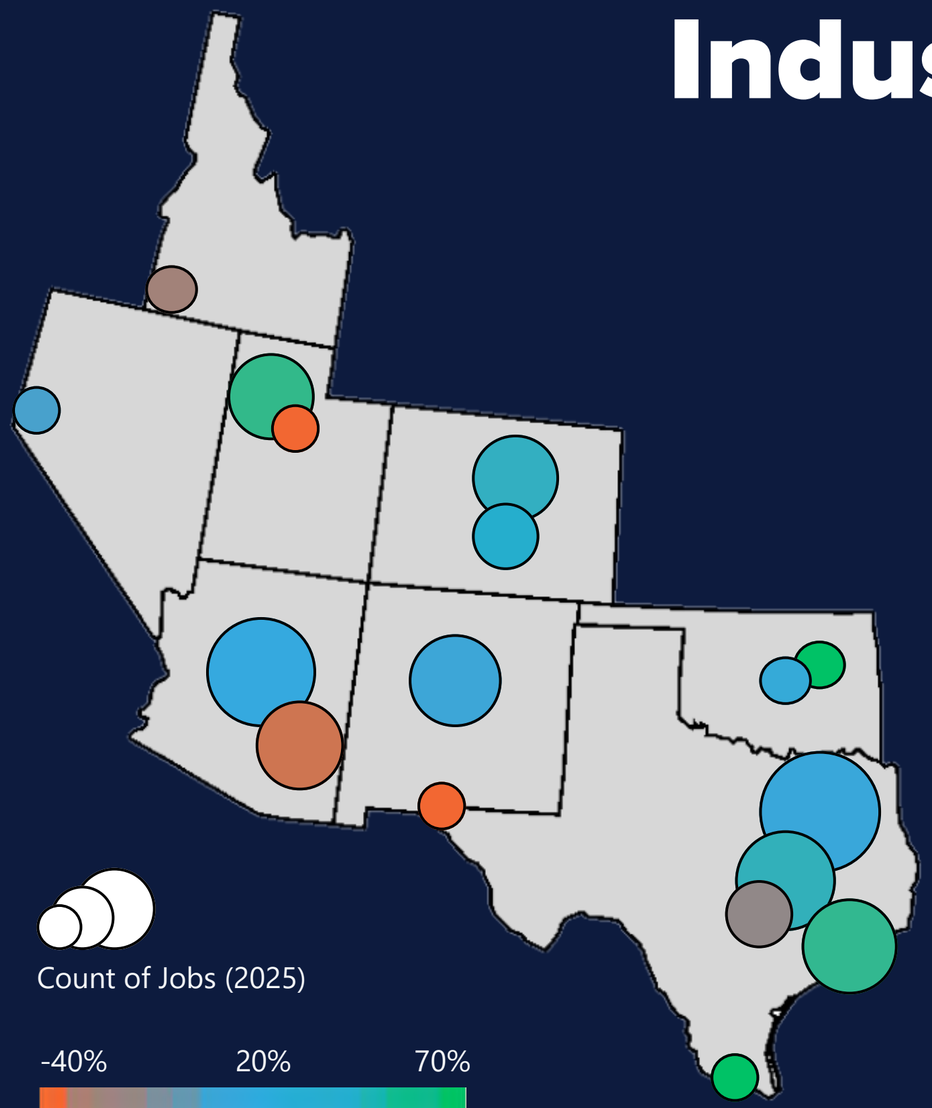
15%

Job Growth

2020-2025

Industry Presence and Growth

Scientific Research and Development, Semiconductor and Electrical Equipment Manufacturing



4th
Largest Market

14%
Job Growth

6x
More Concentrated

Metro Name	2020 Jobs	2025 Jobs	2020-2025 Change	2025 LQ
Dallas-Fort Worth-Arlington, TX	27,214	33,249	22.2%	0.98
Phoenix-Mesa-Chandler, AZ	26,328	26,789	1.8%	1.35
Austin-Round Rock-San Marcos, TX	18,174	23,492	29.3%	2.15
Albuquerque, NM	**18,500**	**20,596**	**11.3%**	**6.07**
Houston-Pasadena-The Woodlands, TX	10,760	15,514	44.2%	0.56
Denver-Aurora-Centennial, CO	6,892	9,112	32.2%	0.68
Salt Lake City-Murray, UT	6,475	8,356	29.0%	1.20
Boise City, ID	8,179	8,309	1.6%	2.51
San Antonio-New Braunfels, TX	3,856	5,830	51.2%	0.62
Colorado Springs, CO	2,719	3,246	19.4%	1.22
Tucson, AZ	2,347	2,363	0.7%	0.73
Oklahoma City, OK	1,166	1,586	36.1%	0.28
Provo-Orem-Lehi, UT	2,567	1,512	-41.1%	0.59
Reno, NV	552	659	19.5%	0.28
Tulsa, OK	278	401	44.2%	0.10
El Paso, TX	278	295	6.1%	0.10
McAllen-Edinburg-Mission, TX	74	152	105.7%	0.06

Markets are those with 500k or more in population

Lightcast 2026

Recent Announcements

PACIFIC FUSION

Castelion

ANTIS SPACE

AVS™

Kairos Power

ROCKETLAB

ARRAY TECHNOLOGIES

QUANTINUUM

JAGUAR PRECISION MACHINE

BLACKHOLE

Discovery 2 Scale

REDWIRE

AREA 1.0 BUILT CAPACITY FOR NATIONAL RECOGNITION



Nationally Recognized

1st Nationally Accredited EDO
in New Mexico & 79th in the Nation

Awards over AREA 1.0

Cleve Mathews Vision Award
NAIOP New Mexico (2022)

Philanthropy Award
Albuquerque Business First (2023)

Bronze Multimedia Promotion
IEDC's Excellence in Economic Developement (2024)

Bronze EDO of the Year
IEDC's Excellence in Economic Developement (2024)

Marketing Program Award
NMIDEA Excellece Awards (2024) and (2025)

Non-Profit Board of the Year
Albuquerque Business First (2025)

Collaborative Impact Award
NMIDEA Excellence Awards - Castelion (2026)

Urban Project of the Year
NMIDEA Excellence Awards - Array Technologies (2024), Pacific Fusion (2026)

NOT ISOLATED WINS — BUILT CAPACITY

AREA 1.0 Built the Engine

Five years of investment built four interconnected capabilities from the ground up.

01 Business Development

Professional capacity to build, manage, and convert a traded-sector pipeline across target industries and national markets.

02 Economic Intelligence

Trusted data, market analysis, and storytelling that support decisions, competitiveness, and accountability.

03 Investor Engagement

A structured investor and partner community that sustains operations and amplifies the region's market presence.

04 Regional Coordination

One regional table connecting government, employers, education, and partners with the capacity to execute.

WHAT AREA 1.0 REVEALED

Three Lessons for Regional Competitiveness

Not conclusions — the foundation for what AREA 2.0 must do next.

01

Organizational Capacity Changed the Trajectory

Sustained investment in business development, market intelligence, and investor convening moved the needle on regional job growth initiatives.

02

Alignment Became an Advantage

One regional table connecting government, business, education, and workforce turned coordination into a competitive edge.

03

Momentum Is Not the Finish Line

Announced projects don't always become realized jobs. The region must continue to close the gap between attraction and realization - focused on competitiveness.

Regional Return on Investment

The investment in AREA 1.0 built organizational capacity, aligned the region, focused on competitiveness and **generated real regional results**

For every $1 invested in AREA 1.0, the regional economy is estimated to realize approximately,

$93
New Labor Income

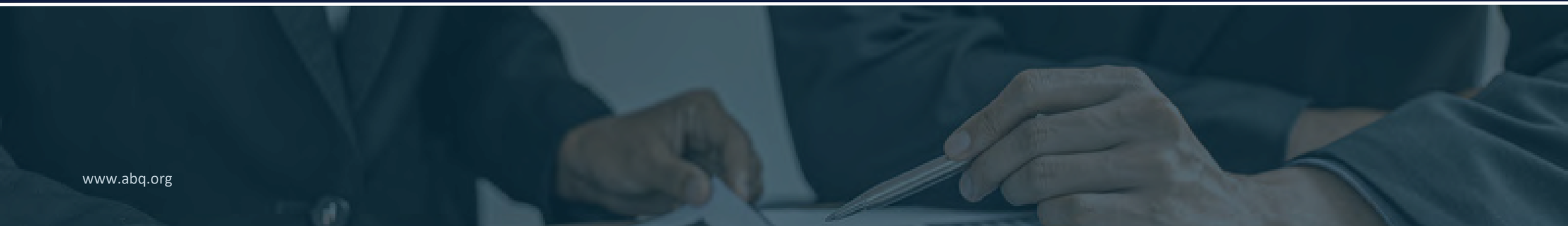
$343
New Economic Output

$148
New Economic Value Added



Setting the Stage: The 3 Discussion Arcs for Today's Discussion

WHERE WE HAVE BEEN	WHERE WE ARE TODAY	WHERE ARE WE GOING
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FROM MOMENTUM TO SCALABLE IMPACT

The AREA 2.0 North Star

Move Greater Albuquerque into the top quartile of peer regions for job growth by driving competitiveness and converting economic development wins into real jobs, payroll, investment, and opportunity.

Three Priorities

01

Win & Realize

Traded-sector investment

02

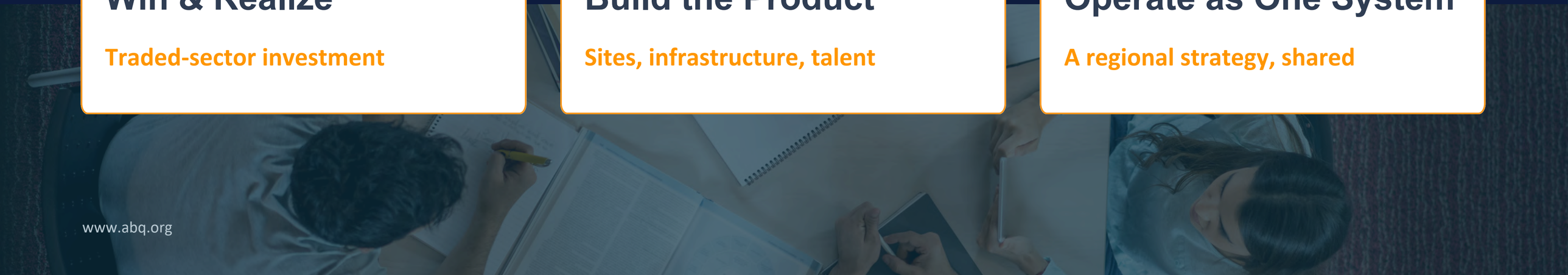
Build the Product

Sites, infrastructure, talent

03

Operate as One System

A regional strategy, shared



FIVE CAPABILITIES WITHIN THE REGIONAL OPERATING SYSTEM

One Goal: From the 2nd Quartile to the 1st Quartile

Win & Realize

Build the Product: Sites, Infrastructure, Talent

Operate as One System

1

Business Development

Build and convert a high-quality traded-sector pipeline that creates quality jobs and capital investment.

2

Economic Intelligence

Trusted data for decisions, storytelling, and accountability across the region.

3

Talent Alignment

Translate employer demand into coordinated workforce action by connecting training and hiring to growth targets.

4

Site Readiness

Move priority sites from inventory to investment-ready, resolving barriers before employers ask the question.

5

Sector Development

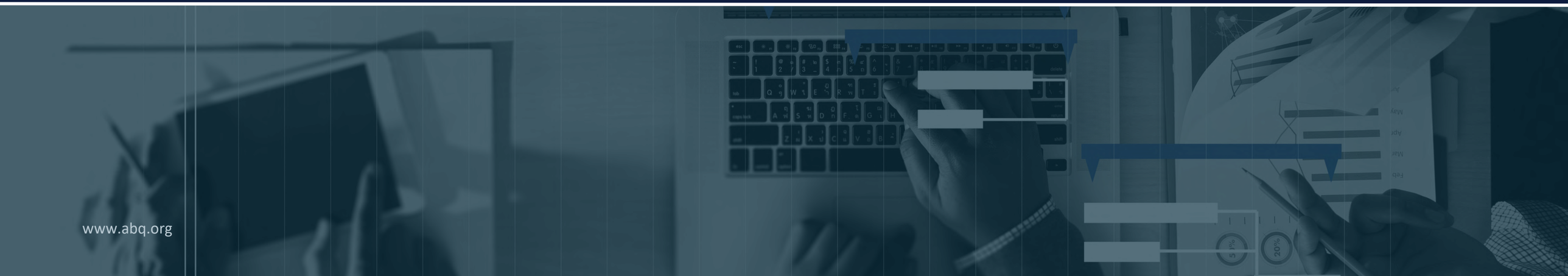
Organize partners around priority industries and shared constraints to accelerate growth.

Investor Engagement and Regional Coordination

SHIFTS RESHAPING SITE SELECTION

How the Industry Is Changing

Site selection in 2027 will not run on the same clock, the same criteria, or the same data it did five years ago. AREA's pipeline has to be built for the industry that's emerging — not the one we've competed in so far.



AREA DEVELOPMENT · 40TH ANNUAL CORPORATE & 22ND ANNUAL CONSULTANTS SURVEY, 2026

The New Era of Operational Certainty

Site selection's longest-running industry benchmark (40 years of corporate-executive data) shows two factors moving faster than any others this year — and sets the frame for everything on the next four slides.

+20.5 pts

Site Readiness & Due Diligence Status — 78% of respondents called it important in 2025; 98.5% do now.

+15.8 pts

Depth of Technical Talent Pipelines — 79.7% in 2025 to 95.5% now. Talent depth, not just headcount, is now named explicitly.

Also near-universal in 2026:

- Skilled Labor · 100%
- Power at Scale · 98.5%
- Operating Cost · 97%
- Permitting Certainty · 94%

For AREA: the survey's own framing says it best — site selection has moved from “where is cheapest” to “where can we be certain this will work.”

Presentation to the Greater Albuquerque Association of Realtors

Filling the Pipeline: Business Development Briefing

Turning Momentum Into Durable Growth



Aida Roberts, Vice President of Business Development, will drive discussion around AREA's pipeline of market driven demand, showcase how we differentiate ourselves nationally, and offer a view into what's on the horizon for a go-to-market strategy as we continue to drive new investments for the region.

Presented by Aida Roberts, Vice President, Business Development

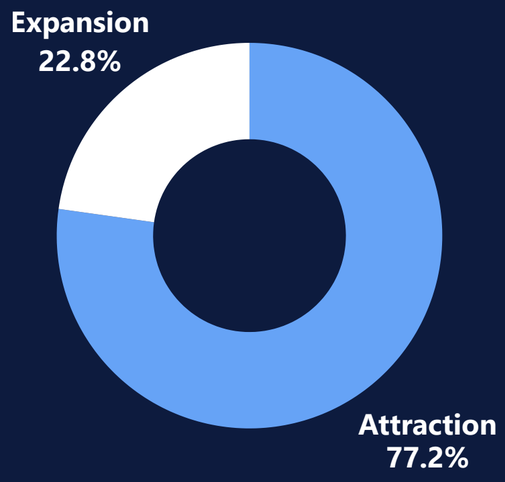
Current Pipeline

81
Deals

14,000
New Jobs Potential

$5.1B
CapEx Potential

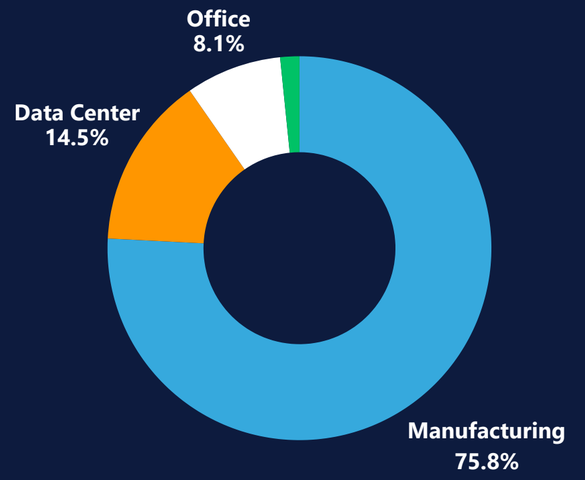
Opportunities by Type



Opportunities by Source



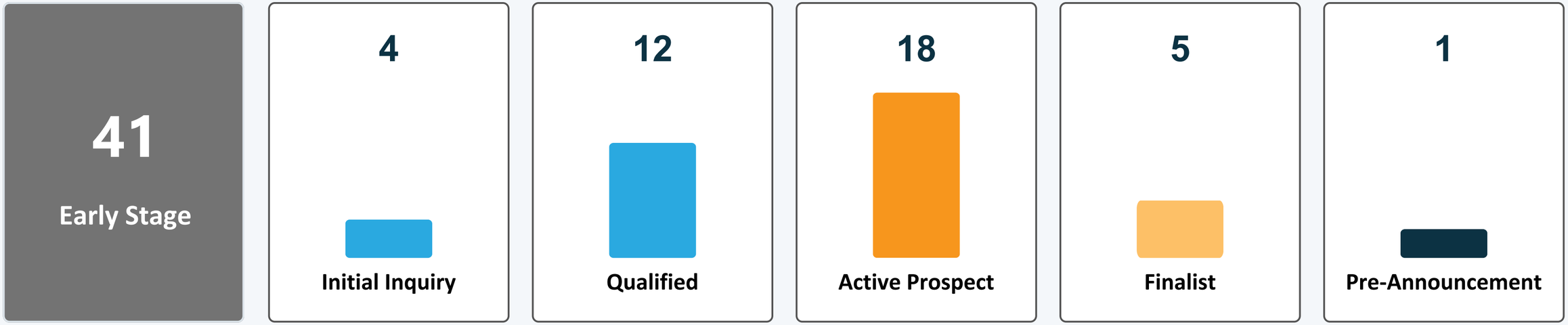
Opportunities by Industry



EVERY PROJECT AREA IS CURRENTLY WORKING, FROM FIRST INQUIRY TO THE MOMENT BEFORE ANNOUNCEMENT

81 Active Deals. $5.1B+ in Tracked Capital Investment.

Maturity Stages



Avg. Time in Stage	36 days	6 months	7 months	10 months	2 months

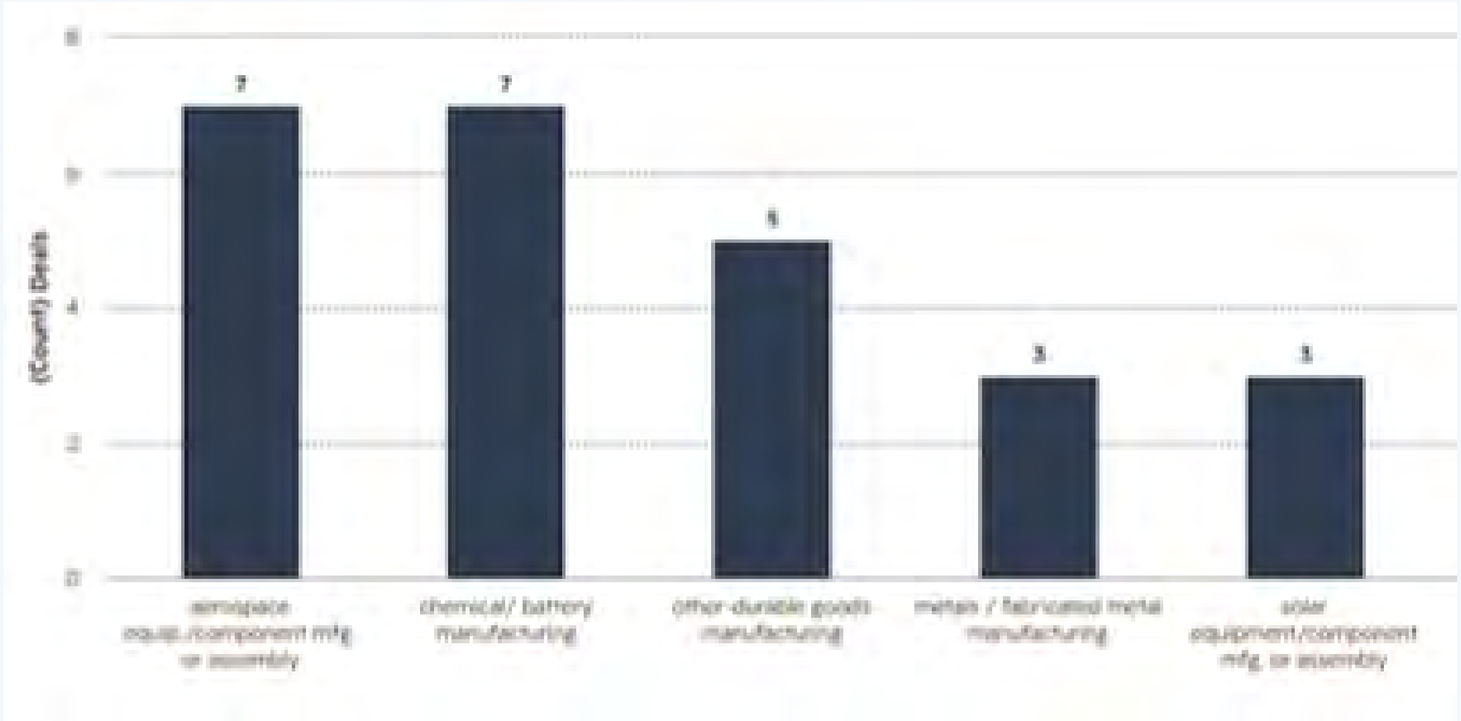
11 deals closed won in 2026 - $125M realized in Capital Investment - 780 Jobs

11	62	2	8
Office	Manufacturing	Distribution	Data Centers

76%

Manufacturing

Top 5 Manufacturing Sectors



Recent Win or High Probability to Close

Project Name	Type	Industry Cluster	Anticipated Jobs	Size Required	CapEx	Referral Source	Inquiry Date
Back in Black	Expansion	Aerospace Manufacturing	70	30K SF	$31 M	Partners	5/8/2024
Cybertron	Expansion	Office: Cybersecurity	93	13K SF	$1 M	BRE	03/05/2026
Discovery	Expansion	Research and Development	87	15k SF	$12 M	Partner	07/09/2026
Sky Eye	Expansion	Aerospace Manufacturing	25	25K SF	$10 M	State + BRE	7/23/2025
Volt	Expansion	Research and Development	117	280K SF	$28.9 M	Direct + Contractor	05/14/2025
Particle	Attraction	Research and Development	15	5K+ SF	$30 M	Partners	7/02/2026
Sindel	Attraction	Battery Manufacturing	500	40 acres	$490 M	State	05/27/2026
High Jump	Attraction	Aerospace Manufacturing	205	20k SF	$74 M	Partner	06/18/2025

Recent Win Pre-Announcement Finalist / High Probability to Close Won

CLIENT SUCCESS

We probably would have moved to Virginia, but AREA made such a difference in helping us establish Discovery 2 Scale in New Mexico. Through introductions, connections, and helping us identify potential sites, Chad and his team provided the support we needed to get our business established and set us up for success.

AREA has always been incredibly responsive, warm, and genuinely invested in helping us succeed. That level of personal attention is unusual, and it speaks volumes about the AREA team. We are incredibly fortunate to have you all in our corner.

- Saryu Fensin, CEO, Discovery to Scale

FROM WHAT'S CHANGING TO WHAT WE DO ABOUT IT

The 2027 Go-to-Market Strategy

A draft strategy built directly from our pipeline data and the trends reshaping the industry.



PARTNER TESTIMONIAL

"Interest from venture-backed companies considering New Mexico for their industrialization moment has skyrocketed, and AREA has met the moment. The rate of change here is unprecedented, and when companies start looking at where to scale, AREA shows up with resources, urgency, and real enthusiasm. They make the case for Greater Albuquerque every single time."

- Brian Adams, Co-Founder, UP.Abundance

TWO AUDIENCES

Where We Lead in 2027

Priorities built from where our pipeline performs. Company engagement compounded by connections to SIC investment.

Consultants

Remain top-of-mind as a location of choice

- Prioritize consultants aligned with target industries.
- Share timely, decision-ready market intelligence.
- Host targeted familiarization tours.
- Maintain consistent, personalized outreach.
- Track engagement, referrals, visits, and conversions.

Prove It Further

Companies

- Prioritize NM SIC-backed funds and companies.
- Build relationships with fund managers and founders.
- Connect companies to sites, talent, and incentives.
- Position the region for growth and follow-on investment.
- Track company needs, expansions, and referrals.

Lead With Readiness

Outbound

- Conduct targeted company recruitment missions.
- Attend priority industry and investor conferences.
- Meet directly with VC firms and portfolio companies.
- Host executive briefings in target markets.
- Coordinate follow-up visits to Greater Albuquerque.

Stay the Course

AREA
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Rooted & Growing: Business Retention & Expansion

Turning Momentum Into Durable Growth



www.abq.org

WHY BRE MATTERS

The Case for Business Retention & Expansion

80%

of new jobs come from existing businesses

5×

less costly to retain a business than recruit new

#1

priority for regional economic development orgs

Sources: IEDC, U.S. Bureau of Labor Statistics estimates

PROGRAM PILLARS

Four Pillars of an Effective BRE Program

01

Executive & Operations Visitation

Proactive, one-on-one visits with business leaders to understand challenges, gather intelligence, and signal regional commitment.

02

Intelligence & Data

Systematic tracking of company health indicators: employment levels, expansion plans, supply chain gaps, and workforce needs.

03

Problem Resolution

Rapid mobilization of resources to streamline processes— permitting, workforce programs, site needs — to remove barriers before businesses consider relocation.

04

Expansion Facilitation

Active support for growth projects: site identification, incentive packaging, and coordination with state and local partners.

AREA: Bridging Partners & Employers

Connecting state and local partners with manufacturer needs through a centralized coordination model

State & Local Partners

- State Offices
- Local Governments
- Utilities & Co-ops
- Industry Associations
- Workforce Development

AREA

Albuquerque Regional Economic Alliance

Centralized Coordination

- Technical Assistance
- Program Support
- Market Intelligence
- Partnership Facilitation
- Resource Alignment

Manufacturer Needs

- Real Estate
- Workforce Connections
- Incentive Navigation
- Market Analysis
- Regulatory Guidance

What Informs the Work

AREA is here to listen — not just inform. Each of these questions shapes how we work.

01	**What is your single biggest operational challenge right now?**	Workforce, permitting, site capacity, supply chain, utility costs, or something else?
02	**Which regional relationships would have the most impact if AREA opened them for you?**	State agency, local official, utility provider, education partner, peer manufacturer?
03	**What does your next 12–24 months look like, and where do you need the region to be ready?**	Workforce capacity, site options, infrastructure, policy environment.
04	**What's happening in your industry nationally that the region should be paying attention to?**	Reshoring, supply chain shifts, workforce trends, technology changes — your intel matters.
05	**How can AREA be more useful to you — and to manufacturing in this region — right now?**	Specific, actionable feedback. We will follow up on every item raised today.

STAKEHOLDER ECOSYSTEM

Who AREA Connects for BRE Success

State Agencies

- *NM Economic Development*
- *Job Training Incentive Program*
- *Dept. of Workforce Solutions*

Municipal Partners

- *Economic Development*
- *Planning and Zoning*
- *Local Leadership*

Education and Workforce

- *Central NM Community College*
- *UNM, NM Tech, NMSU*
- *Central Region Worforce System*
- *Partners in Talent Acquisition*

PROGRAM INNOVATION

BRE in Practice: Program Innovation

BRE isn't a program with an application. It's an ongoing working relationship.

BRE 1.0

BRE 1.0: Build the Foundation

Develop and maintain a comprehensive employer database.

Conduct routine outreach, surveys, and business visits.

Identify immediate challenges, expansion plans, and retention risks.

Connect companies with available programs, incentives, and resources

BRE 2.0

BRE 2.0: Build Trusted Relationships

Replace transactional outreach with consistent, meaningful engagement.

Understand each company's operations, workforce, facilities, and growth strategy.

Coordinate partners around employer needs and expansion opportunities.

Measure relationship strength, issues resolved, jobs retained, and expansions supported.

BRE 3.0

BRE 3.0: Create a Regional Growth Intelligence System

Combine trusted employer insights with workforce, industry, infrastructure, and real estate data.

Identify shared challenges and translate them into coordinated regional solutions.

Use BRE intelligence to shape recruitment, workforce, site readiness, and public policy strategies.

CLIENT SUCCESS

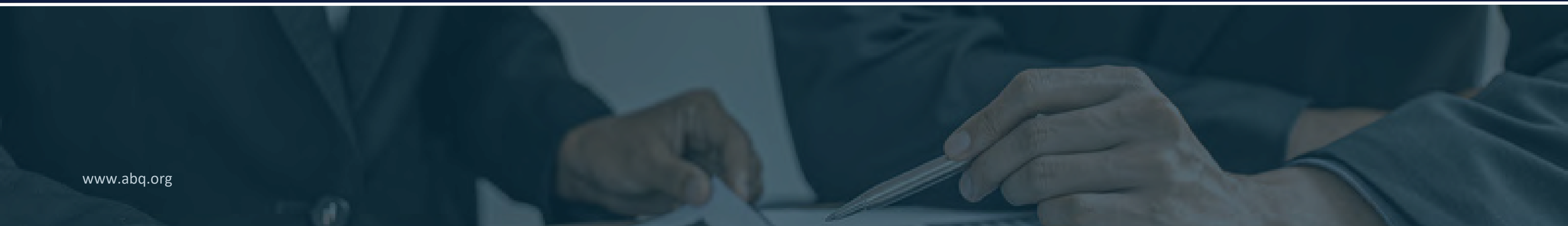
Expressing my appreciation for the visits and the time dedicated. As experienced during your visits, we have several manufacturing areas, each requiring a unique mix of skills and experience. Thank you for bringing the right workforce contacts to us. The training proposal aligns with our objectives to tackle immediate needs for Operator and Technician openings, while also laying the groundwork for a solid program to develop and retain our key talent.

I’m genuinely excited about the opportunity to collaborate more closely with AREA and Workforce Development, so we can take full advantage of the financial incentives available to us.

- Jerry Winton, VP of Operations, Space Systems, Solar Power- Rocket Lab

Setting the Stage: The 3 Discussion Arcs for Today's Discussion

WHERE WE HAVE BEEN	WHERE WE ARE TODAY	WHERE WE ARE GOING
The Foundation	The Momentum	The Vision



FROM MOMENTUM TO SCALABLE IMPACT

The AREA 2.0 North Star

Move Greater Albuquerque into the top quartile of peer regions for job growth by driving competitiveness and converting economic development wins into real jobs, payroll, investment, and opportunity.

Three Priorities

01

Win & Realize

Traded-sector investment

02

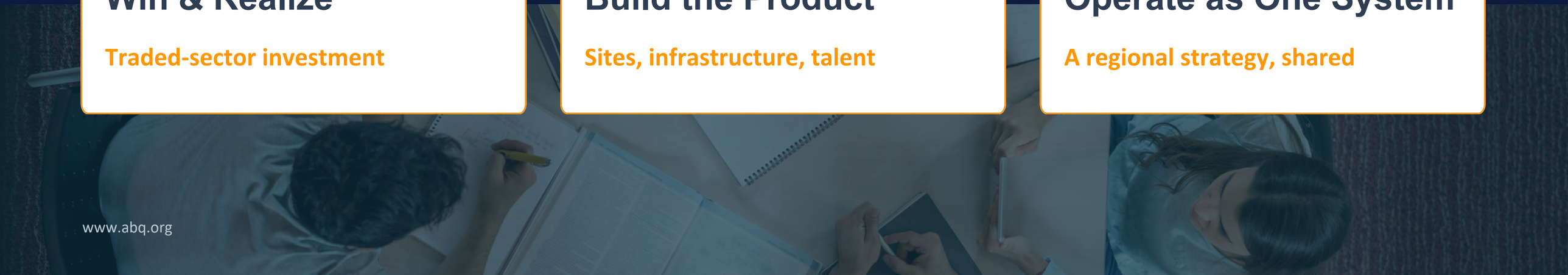
Build the Product

Sites, infrastructure, talent

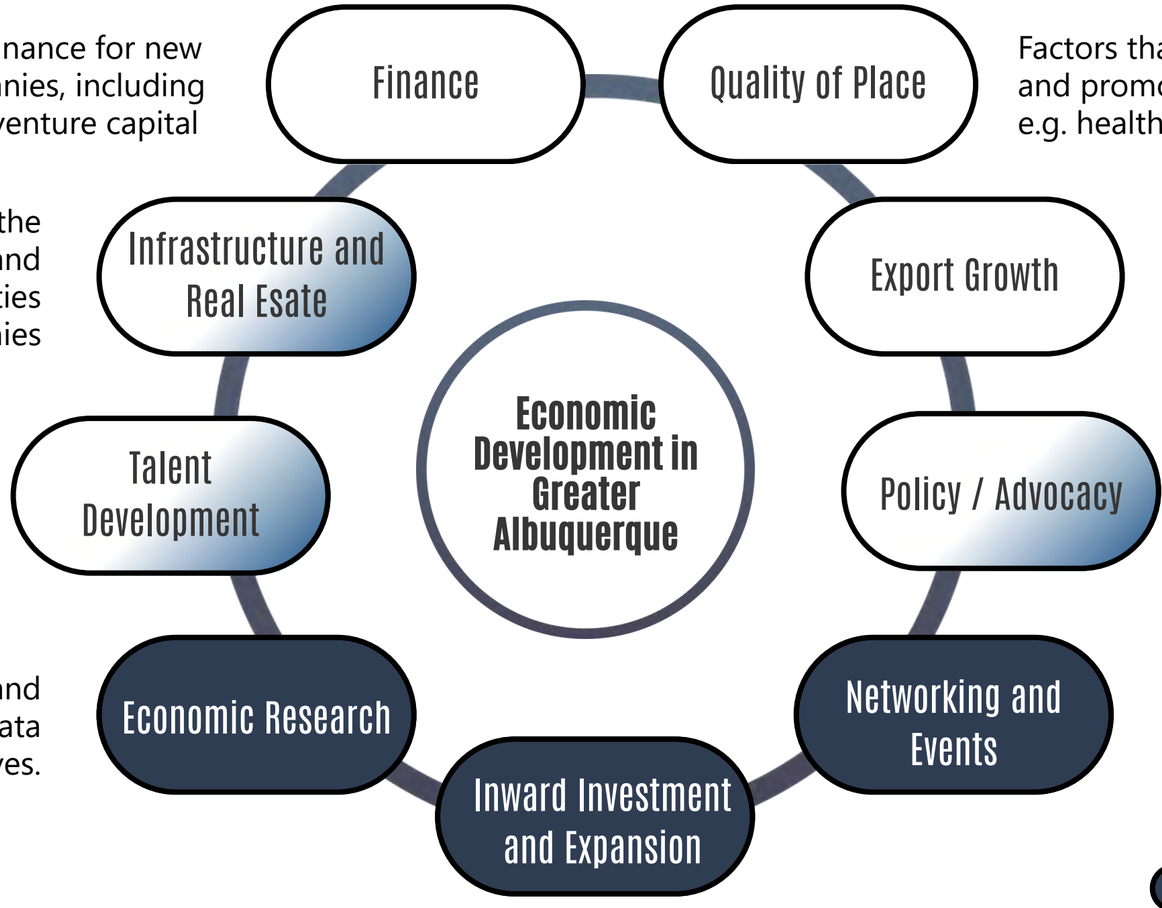
03

Operate as One System

A regional strategy, shared



Operate as One System, Expanded



Ensures access to finance for new and existing companies, including seed funding and venture capital

Factors that align a more vibrant region and promote a higher standard of living e.g. healthcare, housing, tourism

Infrastructure & Real Estate– the physical and digital assets and real estate/incubator facilities available to companies

Support for regional companies' scalability efforts, e.g. marketing of local capabilities and international partnerships with other clusters/regions.

Ensures skills supply and alignment for targeted clusters, supports recruitment and HR issues

Promotes the continued advancement of smart policy and advocates for industry growth and development.

Support for companies and partners leveraging economic data to drive strategies and initiatives.

Refers to matchmaking services and networking events and activities.

Encompasses investment promotion and marketing efforts.

AREA Core Competency

Strategic Partnerships

Thank you.

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AREA
Albuquerque Regional Economic Alliance