

SAN DIEGO

±400,000 SQUARE FOOT
COMMUNITY RETAIL CENTER
ON ±50 ACRES

150,000 CPD - HWY 15

76

4,500 CPD - HWY 76

2.88 ACRES

4.89 ACRES

 Pappas Investments



PALA RANCH



PALA RANCH IS A ±116 AC MASTER PLANNED COMMUNITY WHICH WILL INCLUDE THIS ±400,000 SF RETAIL DEVELOPMENT ON ±50 AC

PROPERTY HIGHLIGHTS

RETAIL DEMAND

The majority of residential growth is adjacent to the site with almost 2,500 units recently completed, under construction or approved. Retail competition is very limited for the project with no power tenant retailers in the trade area. This is a great opportunity for retailers to capture part of the \$841 M sales gap potential for this undeserved trade area.

HIGH VISIBILITY, HIGH TRAFFIC LOCATION

Located at the major intersection of 2 major freeways, Pala Ranch will have excellent visibility from I-15 with 150,000 daily vehicles and the 76 Freeway with 41,500 daily vehicles (over 191,500 cars per day) plus pylon signage!

FREEWAY PROXIMATE, REGIONAL ACCESSIBILITY

All North County residents and visitors to Pala, Harrah's, Pechanga, and Welk Resorts have easy access to the site.

BIG BOX EXPANSION OPPORTUNITY

This will be the largest retail community center on the growing I-15 corridor. Most retailers have stores along the 78 corridor in North San Diego County and Temecula/ Murrieta in South Riverside county creating this expansion opportunity with no competition within a 15 minute drive time of the location. See enclosed 20 minute drive time map identifying current large box locations. (Page 10)

FUTURE HOUSING GROWTH

Adjacent to this development is the master planned residential developments of Horse Creek Ridge, Citro and Aurora Heights with over 2,687 units. In the trade area there are an additional in a 25,968 new homes in a 15 mile radius.

NOW PRELEASING NORTH SAN DIEGO'S NEW SHOPPING DESTINATION



This site plan is not a representation, warranty or guarantee as to size, location or identity of any tenant, and the building, improvements, parking, ingress and egress are subject to such changes, additions and deletions as the architect, Landlord or any governmental agency may direct. Any specified tenant referenced herein is subject to change, deletion, change of location, etc. at any time without prior notice.

PROJECT SUMMARY

Site A	
Site Area - Commercial (Net)	±40 AC
Building M1	106,300 SF
Building M2	145,000 SF
Building M3	30,000 SF
Building M4	23,300 SF
Building M5	25,000 SF
Building M6	14,700 SF
Building M7	25,000 SF
Building S1	9,000 SF
Building S2	8,000 SF
Building P1	5,000 SF
Building P2	5,000 SF
Building P3	3,200 SF
Building P4	4,000 SF
Building P5	2,500 SF
Building p6	3,000 SF
Building P7	2,000 SF
Total	411,000 SF
Parking Provided	± 2,055 Stalls
Parking Ratio	5.0/1000 Stalls

SITE B	
Site Area - Commercial (Net)	±7.6 AC
Pad A	4,761 SF
Pad B	5,000 SF
Pad C	3,800 SF
Total	13,561 SF
Parking Provided	± 179 Stalls
Parking Ratio	13/1000 Stalls

SITE C	
Site Area - Commercial (Net)	±3 AC
Pad D	4,000 SF
Pad E	2,500 SF
Total	6,500 SF
Parking Provided	± 68 Stalls
Parking Ratio	10/1000 Stalls



PALA RANCH
SAN DIEGO
±400,000 SF
COMMUNITY RETAIL CENTER

PALA RANCH
248 RESIDENTIAL UNITS

PALA MESA
GOLF RESORT

PALOMAR COLLEGE

HORSE CREEK RIDGE
751 RESIDENTIAL UNITS

CITRO
886 RESIDENTIAL UNITS

AURORA HEIGHTS
844 RESIDENTIAL UNITS
12.7-ACRE SCHOOL SITE

AREA FOR PROJECT
SIGNAGE

4.89 ACRES
FOR QUICK SERVE
DRIVE THRU

2.88 ACRES
FOR QUICK SERVE
RETAIL



76

41,500 CPD - HWY 76



HORSE RANCH CREEK RD

PALA MESA DR

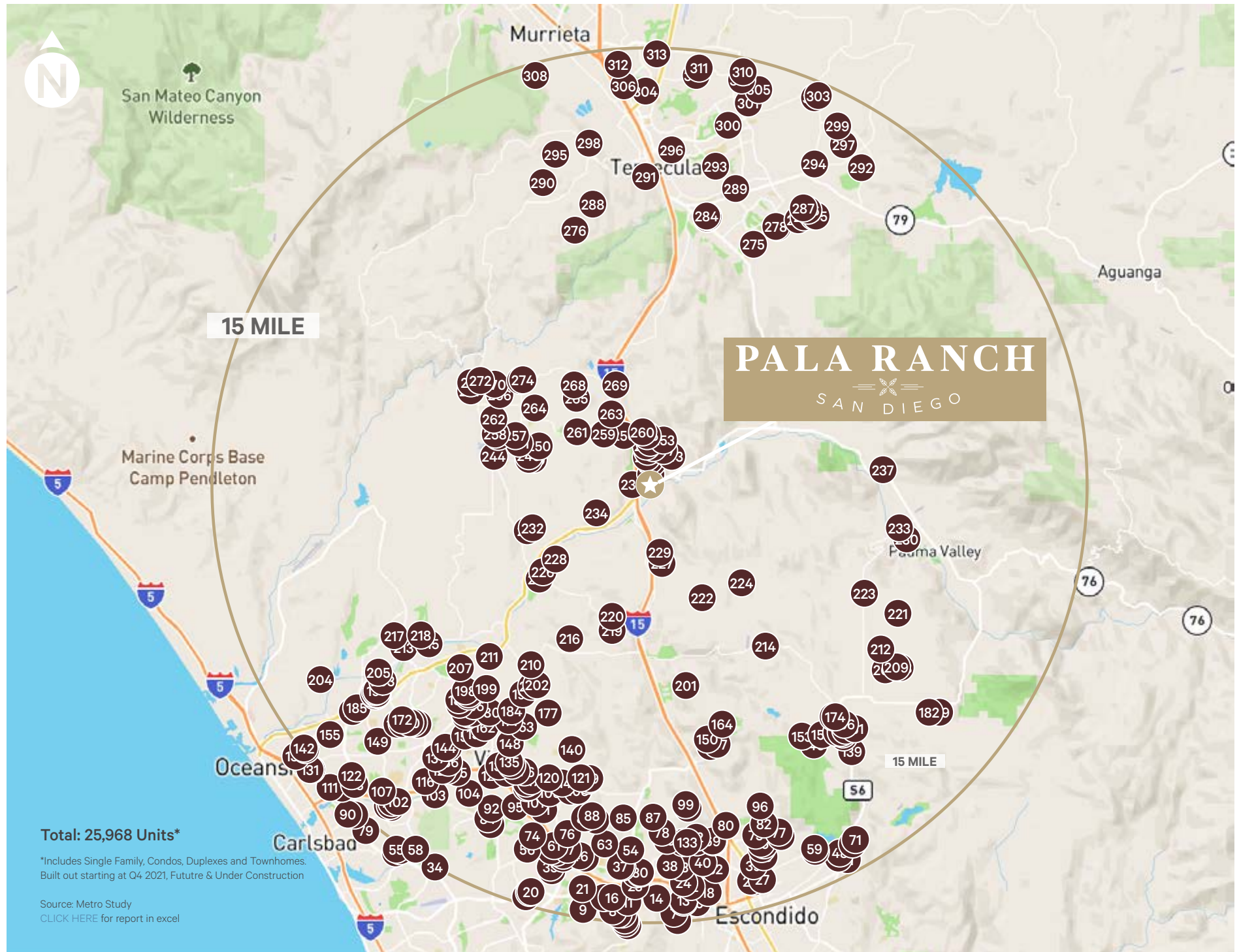
PANKEY RD

PALA RANCH
SAN DIEGO

ELEVATIONS



HOUSING IN DEVELOPMENT & COMING SOON IN 15 MILE RADIUS



HOUSING DEVELOPMENTS ADJACENT TO THE SITE

HORSE CREEK RIDGE

Single-Family	531
Multi-Family	230
Office	157,000 SF
Town Center	61,200 SF
Total	751 / 218,200 SF

CITRO

Single-Family	355
Multi-Family	489
Total	886

PALA RANCH

Residential	248
Light Industrial / Office	120,000 SF
Commercial / Mixed Use	35 DU / 503,500 SF
Total	283 / 623,500 SF

PALA CASINO

PALA RANCH
SAN DIEGO

PALA MESA DR

PANKEY RD

CAL TRANS
OWNED

OLD HIGHWAY 395

150,000 CPD - I-15



14,500 CPD - HWY 76



PALA RANCH
SAN DIEGO

TRADE AREA COMPETITION - 20 MINUTE DRIVE TIME



AREA OVERVIEW

The area is rural picturesque mountains with numerous neighborhoods throughout the region. Offering world-class golf, resorts & casinos, unique art galleries & shops, and numerous nature trails, the surrounding area is a historic, vibrant, and friendly rapidly growing community that serves as a destination for arts, entertainment, retail, and as the center for commerce, education and cultural life for the North I-15 Corridor.

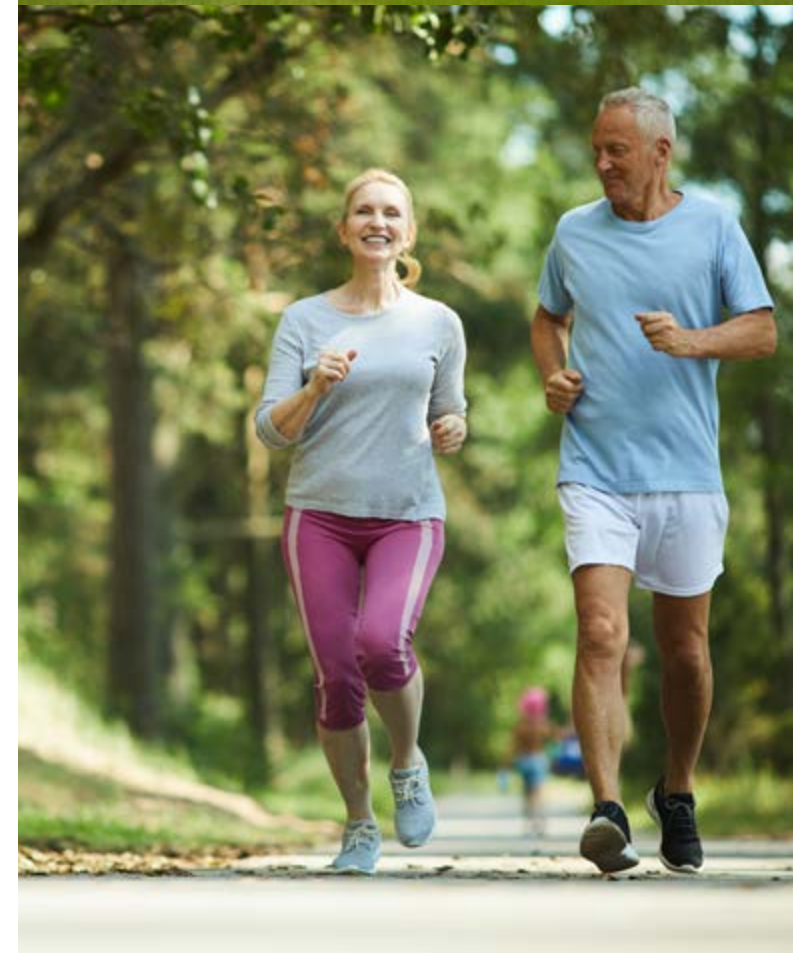
At two major thoroughfares, Pala Ranch is not only easily accessible for the over 390,604 residents in a 20 minute drive time, it will also capture a portion of the 150,000 daily Interstate 15 travelers commuting between San Diego and Riverside Counties. The project is on the “going home side” of the freeway via a full interchange at Highway 76 which is now a completed 4 – 6 lane artery to the site and west, all the way to Interstate 5.

The project’s trade areas have limited retail competition with no hard and soft good tenants and only one independent grocer, four miles southwest. The next closest big box retailers servicing the area are approximately 7 miles southwest in the City of Vista and 5.5 miles northwest in Fallbrook. Power / Lifestyle tenants are roughly a 20+ minute drivetime for residents in the region.

Pala Ranch provides retailers a long-awaited opportunity to capture this customer base that must travel 20 to 40 minutes to service their hard / soft good retail needs.

DEMOGRAPHICS - 20 MINUTE DRIVE TIME

PLACE OF WORK	20 Min Drive Time
2021 Businesses	14,935
2021 Employees	139,171
POPULATION	
2021 Population - Current Year Estimate	390,604
HOUSEHOLDS	
2021 Households - Current Year Estimate	125,723
HOUSEHOLD INCOME	
2021 Average Household Income	\$103,241



MEET YOUR CONSUMER

REPRESENTS THE TOP CONSUMERS WITHIN A
20-MINUTE DRIVE TIME FROM PALA RANCH

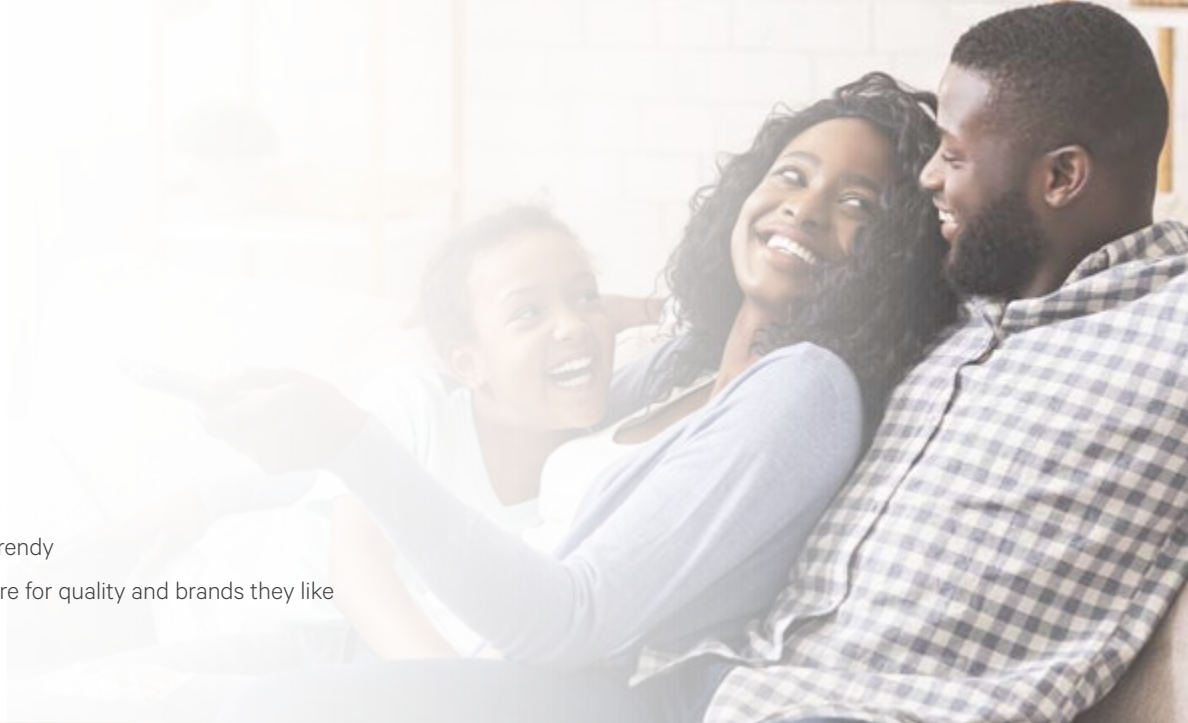
PLEASANTVILLE

14% of market

\$92,900 Median HH Income

42.6 Median Age

- Older families with children. Prosperous domesticity
- Prefer fashion that is classic and timeless as opposed to trendy
- Not cost-conscious, these consumers willing to spend more for quality and brands they like



EXURBANITES

10.5% of market

\$103,400 Median HH Income

51 Medium Age

- Empty nesters, married couples with no children
- Active in their communities, generous with their donations, and seasoned travelers
- Consumers are more interested with quality over cost
- Take pride in their homes and personal style, physically fit and well connected with tech



URBAN VILLAGES

6.5% of market

\$62,300 Median HH Income

34 Medium Age:

- Multi generational and Multilingual
- Trendy and Fashion Conscious, tech savvy but prefer to shop in person
- Favorite stores are Costco, Trader Joe's, Target or Macy's



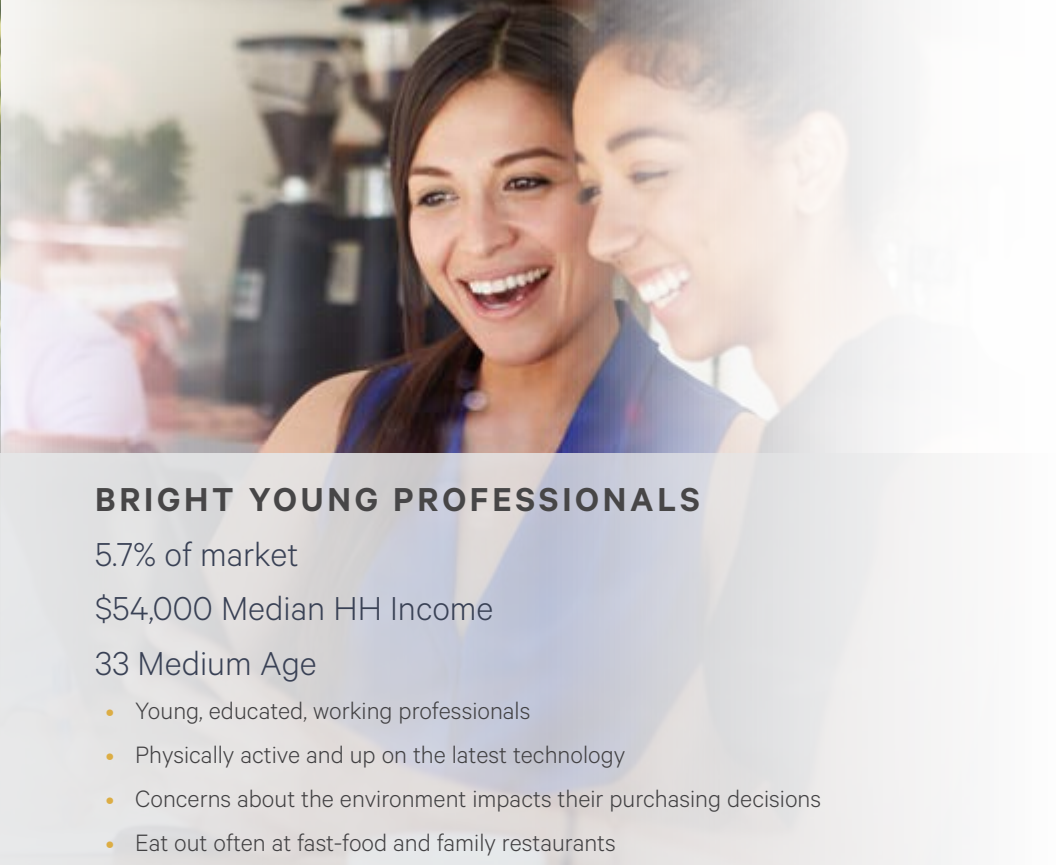
SOCCER MOMS

5.3% of market

\$90,500 Median HH Income

37 Medium Age

- Affluent, family-oriented market with a country flavor
- Partial to new housing away from the bustle of the city and typically have long travel to work
- Family-oriented purchases and outdoor activities dominate



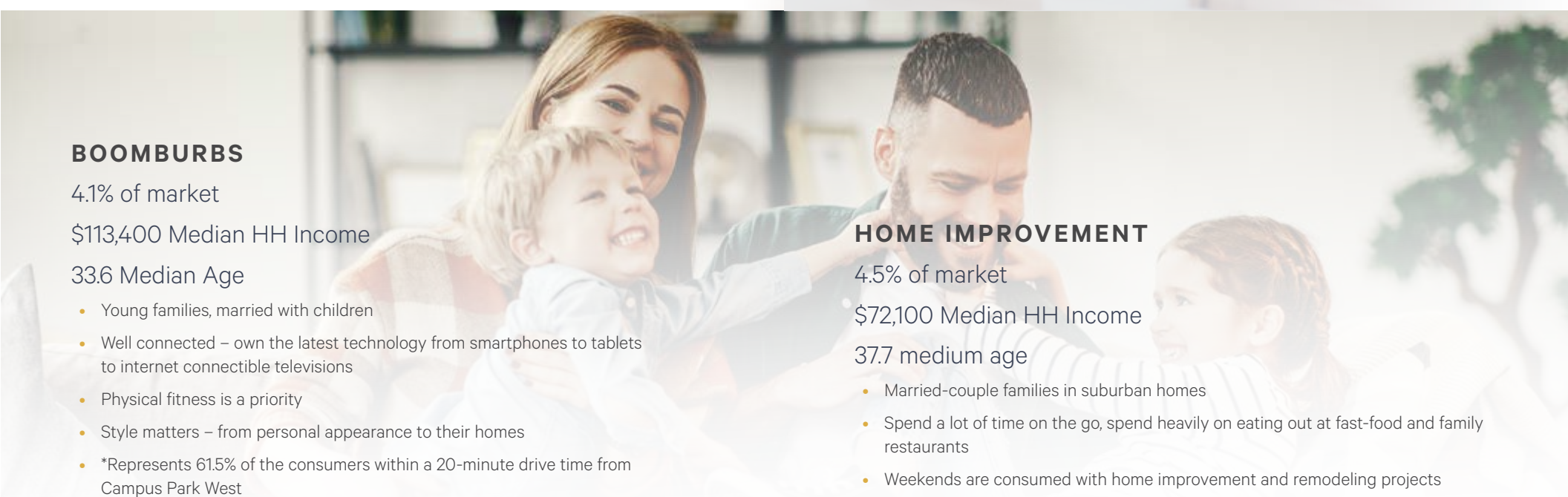
BRIGHT YOUNG PROFESSIONALS

5.7% of market

\$54,000 Median HH Income

33 Medium Age

- Young, educated, working professionals
- Physically active and up on the latest technology
- Concerns about the environment impacts their purchasing decisions
- Eat out often at fast-food and family restaurants



BOOMBURBS

4.1% of market

\$113,400 Median HH Income

33.6 Median Age

- Young families, married with children
- Well connected – own the latest technology from smartphones to tablets to internet connectable televisions
- Physical fitness is a priority
- Style matters – from personal appearance to their homes
- *Represents 61.5% of the consumers within a 20-minute drive time from Campus Park West

HOME IMPROVEMENT

4.5% of market

\$72,100 Median HH Income

37.7 medium age

- Married-couple families in suburban homes
- Spend a lot of time on the go, spend heavily on eating out at fast-food and family restaurants
- Weekends are consumed with home improvement and remodeling projects

PALA RANCH

SAN DIEGO

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ANOTHER QUALITY DEVELOPMENT BY

