Black Book Insights

THE NEXT RESHORING RACE

Why Chandler, Mesa, Goodyear, and Peoria Belong Near the Top of the U.S. Site Selection Shortlist

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A Black Book Insights white paper

Vendor agnostic analysis for operations, supply chain, manufacturing, investment, and policy leaders

BOTTOM LINE

The next reshoring contest is not about whether Greater Phoenix can attract advanced manufacturing. It already has. The real test is whether Chandler, Mesa, Goodyear, and Peoria can convert present readiness into booked projects before rival communities such as Boise, Syracuse, and Lansing lock in utilities, workforce pipelines, supplier commitments, and public-sector alignment.

Greater Phoenix has momentum, credibility, and a widening advanced-industry base. But momentum is not the same as capture. Site selectors do not reward regions for being promising. They reward communities that can reduce execution risk now. That is why these four Phoenix-area communities should be treated as front-line reshoring contenders — and why their leaders should move with urgency before the next wave of domestic manufacturing projects is committed elsewhere.

AT A GLANCE

This white paper evaluates reshoring readiness through the operating lens Black Book Insights has used in recent analysis: cost realism, site readiness, supplier depth, workforce capacity, infrastructure reliability, and transition discipline.

On that screen, Chandler stands out for installed high-tech manufacturing depth, Mesa for scale and multimodal expansion capacity, Goodyear for west-Valley land and fast-ramping industrial execution, and Peoria for its strategic northwest-Valley position, quality talent draw, corridor access, and emerging advanced-industry relevance.

The risk for these communities is not irrelevance. The risk is delay. Boise, Syracuse, and Lansing are proving that communities which align early around workforce, infrastructure, land, and certainty can move from long list to short list to signed project faster than slower rivals.

EXECUTIVE SUMMARY

Reshoring readiness is often discussed as if it were a state-level brand. In reality, site selectors buy communities, not slogans. They buy speed to power, certainty of permitting, available industrial product, labor draw, supplier adjacency, executive housing, air access, and local problem-solving capacity.

That is why Chandler, Mesa, Goodyear, and Peoria matter now. Each represents a different but credible answer to the same site-selection question: where can an advanced manufacturer reduce distance, qualify talent, scale operations, and still preserve flexibility?

Greater Phoenix already has the macro ingredients. It has attracted nationally significant advanced-manufacturing investment, built recognizable ecosystem depth in semiconductors and related industries, and created an operating geography that works for both manufacturing and logistics. But the next bottleneck looks increasingly like the one reshoring leaders across the country are confronting: not intent, but execution.

Power timelines, water stewardship, entitlement speed, workforce programming, supplier depth, and visible civic alignment will determine which communities capture the next cycle and which simply appear in presentations. The practical conclusion is straightforward: Chandler, Mesa, Goodyear, and Peoria should be treated not as passive beneficiaries of regional growth, but as active reshoring platforms that must compete on readiness now.

01 WHY GREATER PHOENIX MAKES THE FIRST CUT

Greater Phoenix is no longer competing as an emerging alternative. It is competing as a functioning manufacturing cluster.

That distinction matters. A community rises into serious reshoring consideration when it can demonstrate more than low taxes or a favorable map location. It must show that advanced projects can be permitted, built, staffed, and ramped. Greater Phoenix now has that proof point. It has ecosystem credibility, visible industrial momentum, and a regional operating environment that supports both large-scale production and supplier recruitment.

That does not mean every Phoenix-area community is equally positioned. Reshoring readiness is uneven even inside strong metros. Some communities offer installed ecosystem depth. Others offer land and logistics. Others offer workforce access, housing capacity, and a more governable path for large-footprint projects. The opportunity in Greater Phoenix is that Chandler, Mesa, Goodyear, and Peoria collectively create a multi-node manufacturing proposition that can serve different sectors and operating models.

For site selectors, that matters more than branding. The ability to place a fab-adjacent supplier in one community, a large-scale assembly or energy equipment facility in another, and a precision manufacturing or medical technology operation in a third makes the metro more durable and more investable.

The reshoring question, then, is not whether Greater Phoenix belongs in the conversation. It does. The more important question is whether its leading communities can translate regional credibility into community-level wins faster than competing U.S. markets.

02 THE FOUR PHOENIX-AREA COMMUNITIES NEAREST TO RESHORING-READY

Chandler

Chandler is the metro's deepest ready-now high-tech manufacturing node. Its advantage is not theoretical. It is installed.

For reshoring projects in semiconductors, electronics, industrial technology, precision equipment, and high-spec production, Chandler offers the feature site selectors value most: ecosystem density that reduces launch friction. The community already understands advanced manufacturing operations, technical labor requirements, utility coordination, and supplier adjacency. That makes Chandler especially attractive for projects where quality tolerance is tight, process discipline matters, and speed to stabilized production is critical.

Chandler's real strength is that it lowers uncertainty. It is not simply selling space. It is selling execution maturity. For companies that want to move from site award to operational ramp with fewer surprises, that matters more than promotional language or one-time incentives.

Mesa

Mesa is the scale-and-optionality play. It gives Greater Phoenix a broader industrial canvas.

Mesa offers large-site potential, strong air and highway connectivity, and room for the kind of expansion logic reshoring projects increasingly require. Advanced manufacturers often do not want only a first building. They want future phases, supplier room, logistics access, and the ability to grow without relocating. Mesa fits that requirement well.

Its value proposition is especially strong for aerospace, defense, batteries, semiconductors, large-format industrial users, and operations that benefit from multimodal connectivity. In reshoring terms, Mesa is not just a city with industrial inventory. It is a scalable manufacturing platform.

That distinction gives Mesa unusual strategic value. It can serve both the first project and the next one. In a cycle where companies increasingly want optionality, that is a meaningful competitive advantage.

Goodyear

Goodyear is the west-Valley growth play that leaders should treat as a frontline opportunity, not a supporting actor.

Its advantages are straightforward and commercially legible: land, corridor access, logistics efficiency, and room for large-footprint industrial development. For manufacturers that need expansion flexibility, truck access, modern industrial product, and a west-Valley labor draw, Goodyear belongs on serious shortlists.

Goodyear's appeal increases when reshoring projects need speed and space at the same time. Large domestic manufacturing programs often fail not because the region lacks interest, but because the site cannot scale, utilities are uncertain, or the land-use path is too slow. Goodyear is well positioned to compete where those variables matter most.

It also strengthens the metro's overall proposition by expanding where major projects can land without forcing every advanced-manufacturing user into the same geography. That increases regional resilience and gives site selectors more credible paths to fit.

Peoria

Peoria belongs in this discussion because it expands the metro's reshoring map from the northwest Valley and adds another credible operating node for targeted advanced-industry recruitment.

Its advantage is strategic balance. Peoria sits in a position that combines quality of place, executive and technical talent attraction, corridor access, and access to the broader northwest-Valley labor shed. That combination matters for manufacturers that need more than a parcel. They need a community that can support recruitment, retention, supplier travel, management relocation, and long-term operating stability.

Peoria is particularly well positioned for sectors that value precision production, medical and life-science adjacency, specialty suppliers, advanced materials, and mid-to-high-skill manufacturing operations that benefit from a strong residential and workforce environment. In a metro where site-selection logic is becoming more distributed, Peoria expands the number of credible ways Greater Phoenix can win.

Its inclusion also matters strategically. Communities do not become reshoring leaders only by hosting the largest projects. They become leaders by increasing a region's total solution set. Peoria does exactly that.

03 WHY COMMUNITY LEADERS SHOULD MOVE NOW

The biggest mistake these communities could make is to assume Phoenix-area momentum is self-executing. It is not.

Reshoring windows close in stages. First, capital chooses regions. Then it chooses communities. Then it chooses the sites with pre-cleared risk: utilities, entitlements, workforce partnerships, supplier path, and visible local alignment. Communities that wait until the request for proposal arrives to solve those issues are already late.

That is why urgency matters now. Rival communities are not standing still.

Boise continues to deepen its semiconductor and advanced-manufacturing identity with a focused ecosystem narrative, workforce alignment, and a disciplined understanding of what major industrial employers need beyond incentives alone. Syracuse has demonstrated how a community can build national credibility by aligning around megaproject readiness, infrastructure, and public-sector resolve. Lansing continues to strengthen its case through advanced-energy and industrial manufacturing momentum that reinforces domestic production capacity.

These places matter because they illustrate the current competitive standard. Communities no longer win simply by being affordable or business-friendly. They win by making projects feel less risky, less slow, and less improvised than the alternatives.

That is the real economic-development warning for Chandler, Mesa, Goodyear, and Peoria. The competition is not waiting for Greater Phoenix to sort out its next phase. Other U.S. communities are actively converting preparedness into signed deals.

For local leaders, the implication is blunt: readiness is perishable. It degrades when infrastructure answers are vague, when workforce promises remain generic, when industrial land lacks strategic protection, and when public-sector alignment arrives only after a prospect is in market. Communities lose reshoring projects in the gap between being attractive and being executable.

04 WHAT PHOENIX-AREA LEADERS SHOULD DO NOW

First, treat utility certainty as the lead variable, not a back-office issue. For reshoring projects, the difference between interest and award often comes down to credible power, water, and timeline answers. Communities that can offer realistic infrastructure pathways immediately move ahead of those that promise to figure it out later.

Second, turn workforce from a generic promise into a named operating system. Site selectors want more than labor-availability language. They want visible pipelines: community colleges, technical programs, apprenticeships, incumbent-worker upskilling, veteran transitions, and fast-response training aligned to actual project categories.

Third, preserve industrial land with intent. Not all advanced-manufacturing users need the same environment. Semiconductor suppliers, aerospace components, medical technology, battery materials, and precision industrial manufacturers each require different land-use logic, utility assumptions, and adjacent uses. Communities should zone and market accordingly.

Fourth, operate as a corridor system, not as isolated municipal silos. One of Greater Phoenix's real strengths is that manufacturers can build regional ecosystems across city boundaries. Leaders should use that advantage, not fight it. The winning pitch is not one parcel in one city. It is a connected operating geography that supports suppliers, labor mobility, and future expansion.

Fifth, make speed part of the product. Entitlement discipline, concurrent review, senior-level project shepherding, and a reputation for solving problems quickly are no longer nice-to-have civic attributes. They are market differentiators.

Sixth, build sector-specific recruitment logic instead of generic industrial marketing. Chandler should continue reinforcing high-spec manufacturing and supplier density. Mesa should emphasize scalable industrial and aerotropolis-linked growth. Goodyear should sharpen its advantage in land-rich, logistics-efficient, large-footprint opportunity. Peoria should position itself around talent-supportive advanced manufacturing, precision industries, and northwest-Valley operating strength.

Seventh, prepare for the supplier question before it is asked. Final assembly and anchor projects increasingly evaluate not only their own site, but the viability of nearby suppliers, tooling support, technical services, logistics providers, and backup capacity. Communities that can answer that ecosystem question with precision reduce investment risk.

05 BLACK BOOK INSIGHTS POSITION

Black Book Insights takes a vendor-agnostic but pointed view here. The issue is not whether Greater Phoenix is in the game. It is. The issue is whether its most competitive communities can operationalize readiness faster than peer markets.

Based on current reshoring dynamics, Chandler, Mesa, Goodyear, and Peoria belong near the top tier of U.S. community-level site-selection conversations for domestic manufacturing growth. Each offers a different form of readiness. Chandler offers depth. Mesa offers scale. Goodyear offers room and westward logistics strength. Peoria offers strategic northwest-Valley positioning and talent-supportive operating conditions.

But readiness without urgency is only a half-advantage. Communities lose reshoring projects in the gap between being attractive and being executable. In 2026, that gap is where the competition is decided.

The right question for local leadership is not whether the metro has momentum. It does. The right question is which communities can turn that momentum into lower-risk, faster-moving, more credible site solutions than Boise, Syracuse, Lansing, and the next tier of aggressive U.S. competitors.

That is the standard now. Not visibility. Not optimism. Not even regional prestige. Execution.

CONCLUSION

The next reshoring race will not be won by states alone, and it will not be won by branding alone. It will be won by communities that can prove they are easier to build in, easier to hire in, easier to supply, and easier to scale.

Chandler, Mesa, Goodyear, and Peoria now have credible claims on that standard. Their leaders should act like it.

Because Boise is moving. Syracuse is moving. Lansing is moving.

And in reshoring, communities that hesitate do not remain tied for first. They get removed from the shortlist.