

Report - December 2014

State of the Chains, 2014

Our 7th annual ranking of national retailers in New York City shows the largest year-over-year increase in the number of chain stores in four years, with Queens experiencing the fastest growth in new stores.

by Christian González-Rivera

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Our seventh annual ranking of national retailers in New York City reveals that the expansion of chain stores across the city picked up considerably over the past year. Overall, there was a 2.5 percent increase in the number of national retail locations between 2013 and 2014, a much more significant increase than the 0.5 percent gain between 2012 and 2013.

Our analysis shows that the 309 retailers that were listed on last year's ranking expanded their footprint in New York City from a total of 7,288 stores in 2013 to 7,473 stores in 2014, a 2.5 percent increase.[1] This marks the sixth straight year there has been a net increase in the number of national chain stores in the five boroughs.

For the seventh consecutive year, Dunkin Donuts tops our list as the largest national retailer in New York City, with a total of 536 stores. Over the past year, Dunkin Donuts had a net increase of 21 stores in the city (a 4 percent gain). Subway is still the second largest national retailer in the city; gaining one additional store over last year's total to make 462 locations across the five boroughs. Rounding out the top ten national retailers in New York are: Duane Reade/Walgreens (with 318 stores)[2], metroPCS (290), Starbucks (280), McDonalds (243), Baskin Robbins (209), Rite Aid (200), T-Mobile (181) and GNC (156). In all, there are now 16 retailers with more than 100 stores across the city.

Almost a third of the 300 national retailers on this year's list[3] increased their footprint in the city by at least one store over the past year, compared to 29 percent last year, and 27 percent reduced their footprints since last year. A few national retailers, including Coldwater Creek, Submarina CA Subs, Gloria Jean's Coffees, Juicy Couture and Goodburger closed all of their New York City locations since last year. The remaining 40 percent of retailers did not have a net change in the number of locations in the city.

All boroughs except Staten Island experienced net increases in the number of national retailers, with Queens seeing the largest year-over-year percentage increase in the number of chain stores. Between 2013 and 2014, the number of national retail locations in Queens increased by 5.3 percent, going from 1,648 stores last year to 1,735 stores this year. The Bronx saw the second highest percentage increase in the number of national retailers (+4.2 percent—from 877 stores in 2013 to 914 stores in 2014), followed by Brooklyn (+3.4 percent—from 1,540 stores to 1,592) and Manhattan (+0.3 percent–from 2,798 stores to 2,807). The number of national retailer locations on Staten Island remained the same since last year, at 425.

Starbucks has more stores in Manhattan than any other national retailer, with 205 locations. In each of the other boroughs, Dunkin Donuts tops the list—it has 161 stores in Queens, 125 in Brooklyn, 79 in the Bronx and 31 on Staten Island. Starbucks actually had a net loss of seven locations in Manhattan and one on Staten Island, and net increases in all the other boroughs.

Among the retailers with significant store growth over the past year:

- metroPCS: 290 locations, up from 257 in 2013 and 7 in 2009
- T-Mobile: 181 locations, up from 158 in 2013 and 96 in 2009
- CVS: 138 locations, up from 118 in 2013 and 107 in 2009
- Dunkin Donuts: 536 locations, up from 515 in 2013 and 429 in 2009
- GNC: 156 locations, up from 138 in 2013 and 110 in 2009
- 7-Eleven: 135 locations, up from 123 in 2013 and 59 in 2009
- Checkers: 28 locations, up from 18 in 2013
- Chipotle: 50 locations, up from 43 in 2013 and 25 in 2009
- Cohen's Fashion Optical: 58 locations, up from 51 in 2013 and 45 in 2009
- Family Dollar: 66 locations, up from 60 in 2013 and 5 in 2009
- Applebee's: 29 locations, up from 26 in 2013 and 17 in 2009
- L'Occitane: 23 locations, up from 14 in 2013 and 12 in 2009
- Modell's: 43 locations, up from 39 in 2013 and 34 in 2009
- Pret A Manger: 39 locations, up from 34 in 2013 and 21 in 2009
- Urban Outfitters: 14 locations, up from 10 in 2013 and 7 in 2009
- Second Time Around: 11 locations, up from 5 in 2013
- Tiger Schulmann's: 11 locations, up from 6 in 2013 and 7 in 2009
- M•A•C Cosmetics: 16 locations, up from 12 in 2013 and 7 in 2009
- Chop't: 14 locations, up from 11 in 2013 and 8 in 2012
- Just Salad: 14 locations, up from 11 in 2013 and 6 in 2011
- Pep Boys: 12 locations, up from 8 in 2013 and 7 in 2009

- Uniqlo: 5 locations, up from 3 in 2013 and 1 in 2009

Among the retailers that closed a number of stores over the past year:

- Cold Stone Creamery: 4 locations, down from 15 in 2013
- Ashley Stewart: 8 locations, down from 16 in 2013
- Crumbs Bake Shop: 16 locations, down from 23 in 2013
- Nathan's: 17 locations, down from 24 in 2013
- Verizon Wireless: 35 locations, down from 42 in 2013
- GameStop: 73 locations, down from 79 in 2013
- Blimpie: 14 locations, down from 20 in 2013
- Famous Famiglia: 18 locations, down from 21 in 2013
- Sbarro: 5 locations, down from 8 in 2013
- Tasti D-Lite: 14 locations, down from 18 in 2013
- Nine West: 11 locations, down from 13 in 2013
- Brookstone: 4 locations, down from 6 in 2013

Our report also charts retailer trends within the boroughs. Among the interesting trends we discovered this year:

- Seven retailers expanded by at least seven new locations in Queens over the past year: T-Mobile (which had a net gain of 16 locations in Queens), CVS (+10), metroPCS (+9), 7-Eleven (+7), L'Occitane (+9), Dunkin Donuts (+7) and GNC (+7).
- In Brooklyn, metroPCS had a net gain of 14 stores over the past year, while Checkers opened 5 new stores in the borough. GNC, 7-Eleven, Pizza Hut and T-Mobile all had a net gain of three stores in Brooklyn.
- In the Bronx, metroPCS added eight new stores and Dunkin Donuts added seven. T-Mobile and Family Dollar each expanded by three stores in the borough.
- In Staten Island, CVS added three new stores over the past year. Interestingly, major retailers Dunkin Donuts, Starbucks and metroPCS all registered a net reduction in stores. Dunkin Donuts and Starbucks both closed one store, while metroPCS had a net loss of three stores.

Every year, we add new national retailers to our ranking. This year, we added five new retailers: Red Robin, 5 Napkin Burger, Chili's, Panda Express and Umami Burger. Including these new retailers, the complete list of 305 retailers has 7,481 store locations across the five boroughs.

This year the 10001 zip code in Midtown/Koreatown that is home to the Manhattan Mall is tied with 10314, home of the Staten Island Mall, as the zip codes with the largest number of national retailer locations in the city. Each of these has 180 national retailer locations. Other zip codes with large numbers of retailers include 10003 in Manhattan's East Village (164 locations) and 10036 in Midtown West (150 locations). Brooklyn Heights 11201 is tied with 11234, home to Kings Plaza Shopping Center in Flatlands for the zip code with the largest number of chain stores of any zip code in Brooklyn (145 locations). In Queens, the Corona/Elmhurst zip code that is home to the Queens Center Mall, 11373 has the highest number of chain stores in that borough (143), and in the Bronx, Parkchester (10462) has the highest number of chain stores of any zip code in that borough (90).

Many zip codes also saw significant increases in the number of locations over the past year. The zip code with the largest year-over-year net increase was the Queens zip code covering JFK Airport, which gained 19 store locations, going from 40 stores in 2013 to 59 this year. In Manhattan, the Gramercy Park zip code 10010 gained 8 stores, while in Brooklyn's

Flatbush/East Flatbush 11203 zip code gained 6 stores. In the Bronx, 10462 (Parkchester) gained five stores, while on Staten Island, Port Richmond 10302 and Pleasant Plains/Princess Bay 10309 both gained 3 stores, the most of any zip code in their respective boroughs.

Manhattan still has the largest number share of national retailer locations in the city at 38 percent of all locations, followed by Queens at 23 percent, Brooklyn at 21 percent, the Bronx at 12 percent and Staten Island at 6 percent. Manhattan also has the highest concentration of chain stores at 118 locations per square mile, compared to 117 per square mile last year. The remaining boroughs have significantly fewer chain stores per square mile: Brooklyn (36), Queens (15), the Bronx (11), and Staten Island (7). Overall there are 25 chain stores per square mile (up from 24 last year) and 1,088 people for every chain in the city (up from 1,125 last year).

The remainder of this report details a comprehensive ranking of national chains in New York city by their number of store locations, the number of store locations in each zip code, zip codes with the most and least number of chains and zip codes with the most and least number of chains by borough.

Click here to download the full report.

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1 Our tally of chain stores in New York City was conducted between July and August of 2014, and is based on each retailers' store locator data taken at that time.

2 Duane Reade was purchased by Walgreens. Although there are still Duane Reade and Walgreens stores throughout the city, we counted all of these stores together.

3 We eliminated from this year's list all of the national retailers that we found had closed all of their New York City locations as of 2013. This accounts for the difference between the number of national retailers on our list last year compared to this year.

This report was written by Christian González-Rivera and edited by Jonathan Bowles. Research by Betsy Allman, with additional research support from Jeremy Anderson and Eva Bein.

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