Report - December 2016

State of the Chains, 2016

Our ninth annual ranking of national retailers in New York City shows that the number of chain store locations across the city increased for the eighth year in a row, driven by growth in the Bronx, Brooklyn, Queens, and Staten Island, but slowed by a shrinking footprint in Manhattan.

by Christian González-Rivera

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The ninth annual ranking of national retailers in New York City by the Center for an Urban Future (CUF) shows a 1.2 percent increase in the number of store locations over last year, an uptick from the 1 percent gain between 2014 and 2015.[1] This is the eighth consecutive year with a net increase in national chain stores in the five boroughs.

CUF's analysis shows that the 303 retailers listed in last year's ranking expanded their footprint in New York City by 89 store locations, growing from a total of 7,154 stores in 2015 to 7,243 stores in 2016—an increase of 1.2 percent. Chains gained locations in the Bronx, Brooklyn, Queens, and Staten Island, while reducing their presence in Manhattan.

For the eighth consecutive year, Dunkin Donuts tops our list as the largest national retailer in New York City, with a total of 596 stores, a net increase of 24 stores in 2015. Subway is still the second largest national retailer in the city with 433 stores, but it has 12 fewer locations than last year. Rounding out the top ten national retailers in New York are MetroPCS (with 326 stores), Starbucks (317), Duane Reade / Walgreens (303), T-Mobile (223), Baskin-Robbins and McDonald's (217 each), Rite Aid (185), and CVS (153).[2] There are 12 retailers with more than 100 stores across the city, down from 13 last year. Walgreens Boots Alliance, which owns both the Walgreens and Duane Reade pharmacy chains, is seeking approval of its acquisition of Rite Aid. The combined company would likely become the second-largest national retailer in the city.

Only one out of every five national retailers on this year's list increased their footprint in the city by at least one store over the past year, compared to one out of three last year. About a third closed locations in the past year, and the remaining third held the same number of stores as last year. Eleven national retailers closed all of their New York City locations since last year:

- Hollywood Tans
- Arthur Treacher's
- Gordon's Jewelers
- Bakers Shoes
- OfficeMax
- Naturalizer
- Square One
- Ranch One
- Cache
- Joyce Leslie
- Benetton

Although Manhattan still has more national retailer store locations than the other boroughs, the number of locations fell 0.9 percent in the past year from 2,739 locations in 2015 to 2,715 this year.

The other boroughs all registered a net increase in 2016. The Bronx saw the biggest percentage increase in the number of chain store locations, growing 4.2 percent from 857 locations in 2015 to 893 locations in 2016. On Staten Island the number of locations increased 3.7 percent (from 406 locations in 2015 to 421 locations in 2016), in Brooklyn the number increased 2.3 percent (from 1,509 to 1,544 locations), and in Queens the number increased 1.6 percent (from 1,643 to 1,670).

Starbucks has more stores in Manhattan than any other national retailer, with 223 locations. In each of the other boroughs, Dunkin Donuts tops the list—it has 179 stores in Queens, 157 in Manhattan, 138 in Brooklyn, 85 in the Bronx, and 37 on Staten Island.

The following retailers experienced significant store growth over the past year:

- **Dollar Tree**: 73 locations, up from 10 last year
- **Crunch**: 23 locations, up from 16 in 2015 and 12 in 2008
- **Sprint**: 89 locations, up from 70 in 2015 and 25 in 2008
- **Family Dollar**: 79 locations, up from 67 in 2015 and 5 in 2009
- **CVS**: 153 locations, up from 137 in 2015 and 108 in 2008
- **Popeye's**: 90 locations, up from 82 in 2015 and 57 in 2008
- **Domino's Pizza**: 79 locations, up from 73 in 2015 and 74 in 2008
- **Dunkin Donuts**: 596 locations, up from 572 in 2015 and 341 in 2008
- **Starbucks**: 317 locations, up from 305 in 2015 and 235 in 2008
- **7-Eleven**: 142 locations, up from 137 in 2015 and 57 in 2008

The following retailers downsized significantly over the past year, but still have a presence in the city:

- **Tim Horton's**: 5 locations, down from 10 in 2015
- **Nine West**: 6 locations, down from 11 in 2015
- **Aerosoles**: 14 locations, down from 23 in 2015
- **The Children's Place**: 30 locations, down from 38 in 2015
- **FedEx Office**: 60 locations, down from 67 in 2015
- **Staples**: 44 locations, down from 49 in 2015
- **Foot Locker**: 45 locations, down from 50 in 2015
- **GameStop**: 70 locations, down from 76 in 2015
- **McDonalds**: 217 locations, down from 232 in 2015
- **Subway**: 433 locations, down from 445 in 2015

Our report also charts retailer trends within the boroughs. We discovered several interesting trends this year:

- Dunkin Donuts added 24 new stores citywide, the greatest increase in new stores of any chain.
- Dollar Tree expanded its footprint more than any other chain, rebranding all Deals locations as Dollar Tree stores and opening additional stores.[3]
- Dollar Tree opened or rebranded 22 locations in Brooklyn, 16 locations in the Bronx, 6 in Manhattan, 17 in Queens, and 2 on Staten Island.
- CVS opened 13 stores in Queens, the most of any chain in a single borough.
- Subway closed 15 locations in Manhattan, the largest drop of for any national retailer in any borough.
- Overall, 166 retailers have more of their stores in Manhattan than any other borough, 60 retailers have more of their stores in Queens than any other borough, 44 have the most stores in Brooklyn, 15 have the most in the Bronx, and three have the most on Staten Island.
- Only 136 out of the 303 retailers (45 percent) have any locations in the Bronx, compared to 255 (84 percent) in Manhattan, 200 (66 percent) in Queens, 183 (60 percent) in Brooklyn, and 157 (52 percent) on Staten Island.
- A total of 48 retailers have no locations outside Manhattan, most notably Pret A Manger, which has all 42 New York City locations in Manhattan, Papyrus with 22, and Chop't with 17.
- Four retailers have their only locations in Queens: Gold's Gym, Bare Escentuals, Puma, and Easy Spirit.
- Two retailers have their only locations on Staten Island: Stride Rite and Build-A-Bear Workshop.

Every year, we add new national retailers to our ranking. This year, we added nine new retailers:

- Vivi's Bubble Tea
- Kung Fu Tea
- Aroma Espresso Bar
- Gong Cha
- Totto Ramen
- Liquiteria

- Sweetgreen
- Chick-fil-A
- DAVIDs TEA

This year the 10314 zip code, home to the Staten Island Mall, took the top place for highest number of national retailer locations at 183, up from 176 last year. Manhattan's 10001 zip code in Midtown/Koreatown that is home to the Manhattan Mall and the Herald Square shopping areas has the second highest number of locations at 169, down from 172 last year; it is followed by 10003 in Manhattan's East Village (161 locations). Zip code 11201 in Brooklyn Heights / Downtown Brooklyn has the largest number of national retailer locations in that borough at 139; zip code 11234, home to Kings Plaza Shopping Center in Flatlands, is a close second at 133 locations. In Queens, zip code 11373 in Corona/Elmhurst, home to the Queens Center Mall, has the highest number of chain stores in that borough (129). In the Bronx, zip code 10475 in Baychester / Co-op City has the highest number of chain stores of any zip code in that borough (86).

Increases in retailer locations by zip code were modest this year. The biggest increase was in the 10475 zip code in Baychester / Co-op City in the Bronx, which saw an increase of nine locations, followed by seven-location increases in 10018 (Manhattan Midtown West), 10314 (New Springville, Staten Island), 10451 (High Bridge / Morrisania in the Bronx), 11372 (Jackson Heights, Queens), 11212 (Brownsville, Brooklyn), and 11430 (JFK Airport).

Manhattan still has the largest number share of national retailer locations in the city at 37 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 115 locations per square mile. The remaining boroughs have significantly fewer chain stores per square mile: Brooklyn (35), Queens (15), the Bronx (11), and Staten Island (7). Overall there are 24 chain stores per square mile and 1,181 New York City residents for every chain store location in the city.

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.

Download the full report.

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[1] CUF defines a "national retailer" as one that has at least two locations in New York City and at least one location outside the city limits.
[2] The data for this report was compiled in July 2016.
[3] Dollar Tree acquired the Deals chain in 2006, but only rebranded the locations at the beginning of 2016.

Center for an Urban Future (CUF) is a catalyst for smart and sustainable policies that reduce inequality, increase economic mobility, and grow the economy in New York City. An independent, nonpartisan policy organization, CUF uses fact-based research to elevate important and often overlooked issues onto the radar of policymakers and advance practical solutions that strengthen New York and help all New Yorkers participate in the city's rising prosperity.

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