

Data - December 2021

State of the Chains, 2021

Our fourteenth annual ranking of national retailers in New York City finds a slow rebound of chain stores across the five boroughs, following the most challenging year on record. This year chain stores broke a three-year streak of net losses, increasing locations by 2.7 percent. But this year's bounce back—largely powered by the reopening of 260 stores that had shuttered in 2020—still leaves the city well short of pre-pandemic levels.

by Sara Bellan and Charles Shaviro

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Chain retailers began a slow return to New York City in 2021, adding 186 stores across the five boroughs as the pace of commercial activity picked up following the most challenging year on record. After 12.8 percent of chain retailer locations closed in 2020, the city saw a 2.7 percent increase in 2021, breaking a three-year streak of net losses in chain stores (before 2020, NYC lost 3.7 percent of locations in 2019 and 0.3 percent of locations in 2018). But this year's bounce back—largely powered by the reopening of 260 stores that had shuttered in 2020—still leaves the city well short of pre-pandemic levels.

CUF's fourteenth annual analysis of national retailer locations in New York City finds a number of encouraging signs for New York's chain retail sector. Of the 1,021 store locations that shuttered in 2020, a little over a quarter (260) reopened in 2021. Several retailers went beyond reopening locations that closed last year and actually exceeded their pre-pandemic store count—including Pret A Manger, Shake Shack, Insomnia Cookies, Papa Johns, and Kiehl's. Meanwhile, far fewer national retailers shut down altogether this past year, with just eight chains closing all their stores in the city, compared to 27 last year.

However, there were other less promising trends. Apart from the 260 stores that reopened after closing in 2020, there was a net decline of 74 stores this year. And although the 307 national retailers in our report increased their overall number of store locations from 6,970 at the end of 2020 to 7,156 today, this is still 10 percent below the 7,948 chain stores we counted in 2019 and 12 percent below the 8,136 chain stores in 2018.

The mixed data on chains appears to mirror broader trends in New York's retail recovery from the pandemic. The city was home to 300,800 retail jobs in October 2021, a significant rebound after falling to 224,600 jobs in April 2020, but still 11

percent below the 339,500 jobs in the month before the pandemic (February 2020).[1]

In 2021, Manhattan saw the largest numerical gain in chain retailer locations, adding 86 stores—a 3.4 percent increase. This partially reverses the disastrous year for Manhattan-based chain stores in 2020, when the number of national retailer locations shrank by 17.4 percent. Staten Island saw the fastest rate of increase this year, with its chain store footprint jumping by 4.5 percent, or 19 stores. Brooklyn added 41 stores (+2.7 percent), Queens added 30 stores (+1.9 percent), and the Bronx added 10 stores (+1.1 percent). Manhattan, powered by re-openings, accounted for 46 percent of the growth in stores locations in 2021, after accounting for over half (51 percent) of closures in 2020. None of the boroughs was able to return to 2019 levels.

Number of Chain Stores by Borough, 2021 and 2020

Borough	2021	2020	Pct. Change
BRONX	927	917	1.10%
BROOKLYN	1,564	1,523	2.70%
MANHATTAN	2,591	2,505	3.40%
QUEENS	1,631	1,601	1.90%
STATEN ISLAND	443	424	4.50%
NYC	7,156	6,970	2.70%

This year's report, based on data compiled from store locators between October 20, 2021, and November 26, 2021, finds that while chain retailers' total footprint expanded in 2021, the largest retailers in New York City were still feeling the effects of the pandemic and subsequent economic headwinds. Dunkin', still the city's largest retailer after shuttering 18 of its stores in 2020, opened or reopened 26 locations in 2021 while also closing a handful of additional outposts, resulting in a net increase of just one store across the five boroughs. Metro by T-Mobile (formerly MetroPCS), the second-largest chain retailer in the city, had a net decrease of 21 locations, despite reopening 11 stores this year. Of the top 10 largest retailers in New York City, four saw a year-over-year decrease in locations in 2021 (Metro by T-Mobile, Duane Reade, T-Mobile, and McDonald's). In total, the retailers added just 12 stores, an average of just over 1 per retailer, as they grew by a mere 0.4 percent.

Many chains across the city saw a net increase in their footprint, boosted by store reopenings. The largest increases were: Taco Bell (+28), Jimmy Jazz (+27), Pret A Manger (+23), Le Pain Quotidien (+23), Pizza Hut (+22), Subway (+21), Enterprise (+20), Soul Cycle (+19), and Popeye's (+18).

In last year's analysis, we noted that many retailers reported significant numbers of temporary closures. This year, 260 of these store locations reopened their doors after closing in 2020. Leading the pack with 10-plus re-openings: Jimmy Jazz reopened 26 store locations; Pret A Manger reopened 19 locations, Soul Cycle reopened 17 locations; Baskin-Robbins reopened 17 locations; Starbucks reopened 13 locations; Subway reopened 13 locations; Dig (formerly Dig Inn) reopened 12 locations; MAC Cosmetics reopened 12 locations; and Metro by T-Mobile reopened 11 locations.

While chain retailers gained ground overall this year, a number shuttered their doors completely. Eight total retailers—including merchandisers selling clothing, beauty products, coffee, edible gifts, and one travel agency—closed their doors completely in 2021. Apparel chains Century21 (-5), Kenneth Cole (-1), French Connection (-1), and Fossil Accessory (-1), closed all of their stores in 2021, although Century21 has since announced plans to return to New York City, despite their store closures and bankruptcy. Edible gift chain Godiva Chocolatier shut all New York City–based locations (-3). Beauty supply store Ricky's (-1) closed its final location, after a steep decline from 14 locations in 2017. Coffee shop Aroma Espresso Bar closed its last New York City–based location, as did travel agency Liberty Travel, which shuttered its remaining two locations in New York City between 2020 and 2021, unable to withstand the pandemic-era decline of tourism.

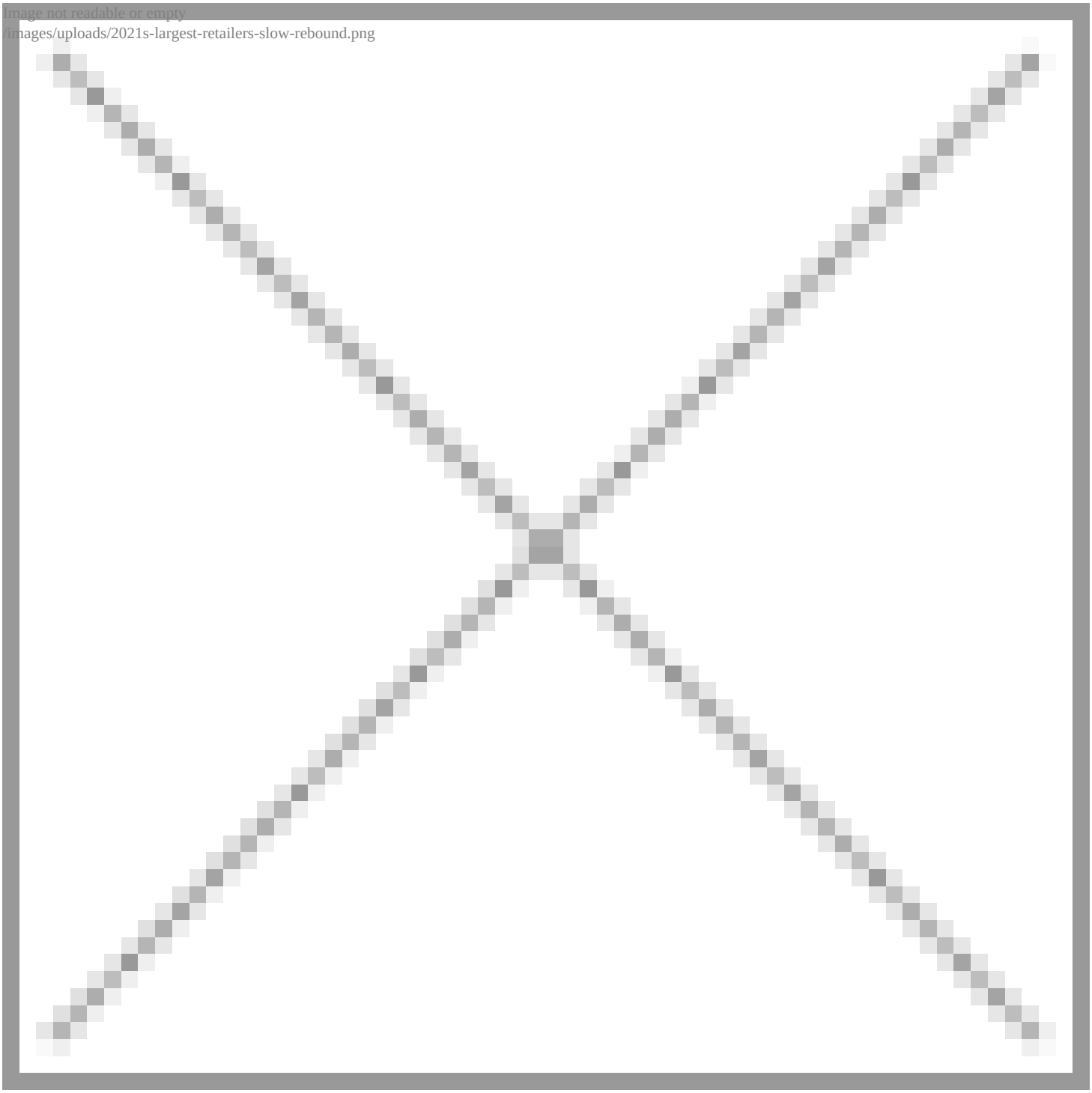
Last year's report showed significant closures of merchandise retailers throughout the city—perhaps the combined result of the pandemic's continuing effect on in-person activity and further growth in e-commerce and online retailer competitors. While trends of closures continued among merchandise retailers, several increased their overall footprint between 2020 and 2021. The level of closures among merchandisers was significantly lower than in 2020.

- Merchandisers continuing to decline included: Victoria's Secret (down from 13 to 9 stores), Footaction (down from 14 to 10 stores), Children's Place (down from 28 to 24 stores), Solstice Sunglass Boutique (down from 7 to 4 stores), and Banana Republic (from 11 to 6).
- However, some merchandisers increased their total footprint across the city, including: Target (from 25 to 32 stores), Burlington Coat Factory (from 14 to 18 stores), and Old Navy (from 17 to 23 stores).

In 2021, 16 percent of merchandising retailers experienced an increase in locations, 50 percent experienced no change, and 34 percent experienced a decrease. In 2021, no merchandise retailer experienced a decline of larger than 5 store locations (with Century21's closure of all 5 stores being the largest decline), compared to the significant closures reported in 2020.

While merchandisers continued to struggle in 2021, other sectors experienced significant growth. Food-service chains including fast-casual bakeries, fast-casual restaurants, pizza stores, retail bakeries, and fast-food restaurants all saw impressive increases, while other food industries grew more modestly:

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- Fast-casual bakeries increased by 49 percent, followed by fast-casual restaurants (+17 percent), pizzerias (+11 percent), retail bakeries (+9 percent), fast-food restaurants (+7 percent), and tea shops (+5 percent), grocers (+2 percent), and coffee shops (+1 percent).
- Other significant industry increases included: pet supplies stores (+22 percent), health clubs and exercise studios (+14 percent), beauty salons and supplies stores (+8 percent), and optical goods and optometrists (+7 percent).

After last year's record closures among sandwich shops, fast food burger chains, ice cream and yogurt chains, and health and exercise studios, 2021 saw the reopening of many stores in these industries. Many of the sectors that had significant declines in 2020 seem to be on the road to economic recovery, although very few are matching 2019 numbers:

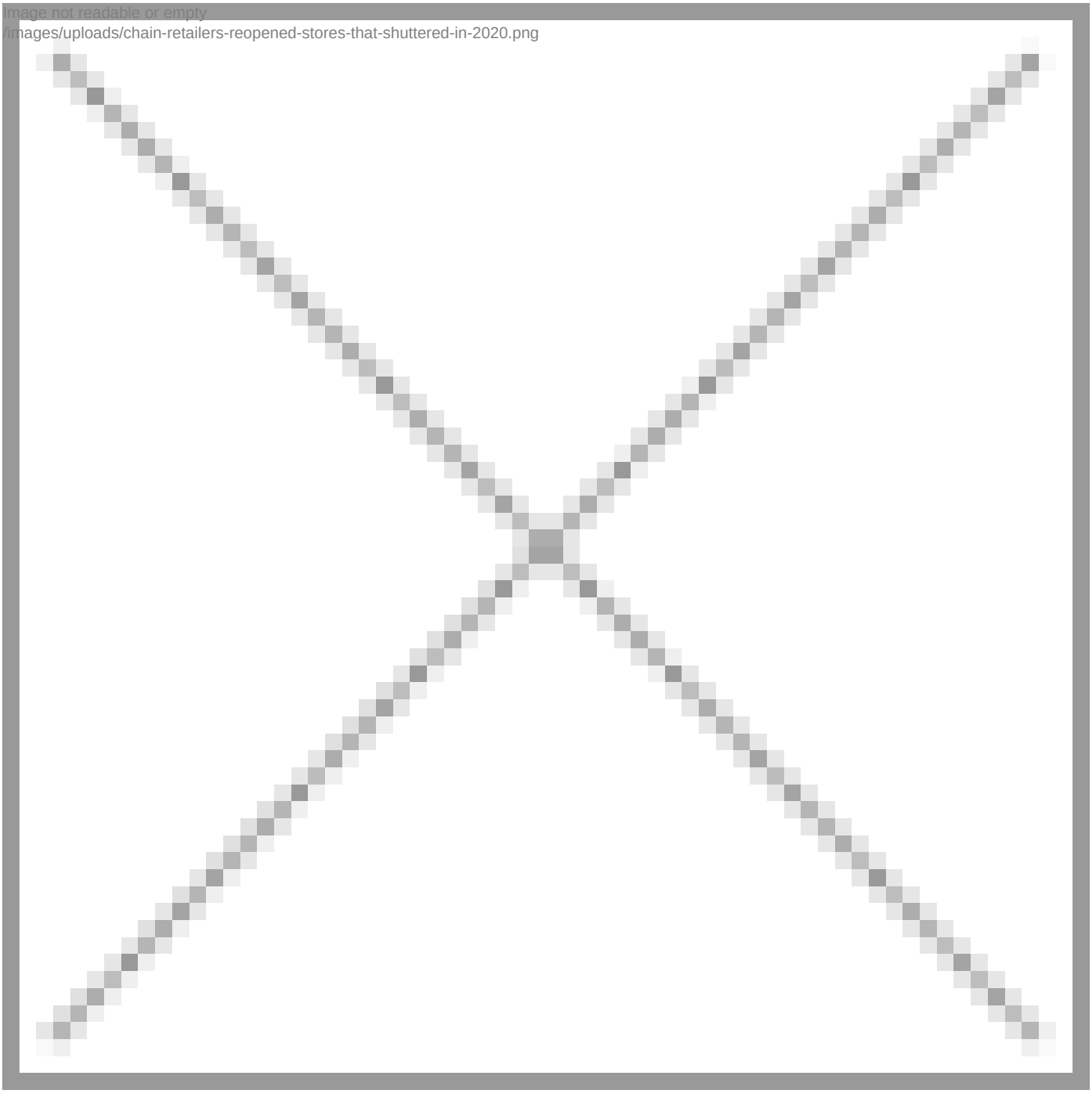
- Although only 28 percent of New Yorkers had returned to in-person work as of October 2021, even a modest rebound of office workers eating lunch in the city's central business districts appears to have contributed to notable gains for sandwich and soup shops this year.[2] While not quite reaching 2019 levels, many saw significant increases, including: Subway (from 257 stores in 2020 to 278 stores in 2021), Le Pain Quotidien (from 12 to 35), Potbelly Sandwich Shop (from 10 to 13), and Hale & Hearty Soups (from 13 to 16). Of all the Soup and Sandwich shops that declined last year, Au Bon Pain was the only chain to not increase its numbers, closing an additional 2 stores between 2020 and 2021 (from 11 to 9). Pret A Manger surpassed their pre-pandemic footprint, reaching 63 total locations in 2021, up from 40 in 2020 and 56 in 2019.
- Increases among burger chains between 2020 and 2021 include: Burger King (from 97 to 105), Shake Shack (from 20 to 36), and White Castle (20 to 24). Each of these retailers also surpassed their pre-pandemic 2019 totals this year.
- While some ice cream and yogurt shops increased between 2020 and 2021, other chains continued to face declines. Those that increased include: Baskin-Robbins (171 to 175), Red Mango (7 to 8), Ha?agen-Dazs (12 to 14), and Cold Stone Creamery (7 to 8). At the same time, Ben & Jerry's (6 to 4), Pinkberry (10 to 9), Dairy Queen (3 to 2), and Tasti D-Lite (4 to 2) all continued to decline.
- Health clubs, fitness studios, and exercise gyms made substantial gains, reopening many stores after widespread 2020 closures amid COVID-19 concerns. Soul Cycle (0 to 19 locations), Rumble (2 to 6), Tiger Schulmann's (from 11 to 12), and Crunch (from 25 to 27) all increased their location numbers. Equinox Fitness Club and Peloton both maintained their 2020 level, at 34 and 4 locations, respectively.

Different sectors such as beauty and pizza saw substantial increases, some even surpassing 2019 numbers in locations:

- Pizza stores and restaurants with increases include: Pizza Hut (from 12 to 34), Papa Johns (from 54 to 55), Famous Famiglia Pizzeria (from 9 to 10), and Chuck E. Cheese (from 6 to 7). Both Uno Pizzeria & Grill and Two Boots Pizza maintained their 2020 numbers, at 3 and 4 locations, respectively. Only two pizza stores declined in number this year: Little Caesar's (from 21 to 19) and Domino's Pizza (from 90 to 89). Pizza Hut and Papa Johns' gains lifted above their pre-pandemic 2019 levels.
- Beauty stores with increases include: M·A·C Cosmetics (10 to 22), Kiehl's (9 to 20), Bath & Body Works (13 to 14), and Lush (6 to 7). Kiehl's surpassed their 2019 numbers, perhaps benefiting from more New Yorkers doing hair and cosmetics at home during the pandemic.

As the city moved toward recovery, some stores continued to log significant year-over-year declines of over 10 locations since the 2020 report, including: Metro by T-Mobile (-21), 7-Eleven (-16), AT&T (-16), T-Mobile (-15), and GameStop (-12).

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111 retailers held steady, with no reported changes to their 2020 location totals. These included brands such as: Rainbow (59), Equinox Fitness Club (34), Staples (32), Sephora (25), Applebee's (22), Gap (21), P.C. Richard & Son (21), Danice Stores (18), Chop't Salad (18), H&M (17), Blue Bottle Coffee (17), Lori’s Gift (17), Bareburger (17), Whole Foods (15), Pep Boys (14), Raymour & Flanigan Furniture (14), Advance Auto Parts (13), Dr. Jay’s (13), Claire's (13), and Baked By Melissa (12).

Last year’s record-breaking closures saw 27 retailers shut all of their locations in the five boroughs, for a total of 299 closed stores. This year just eight retailers shuttered completely, losing 15 locations in total.

Retailer trends since last year

For the fourteenth consecutive year, Dunkin' tops our list as the largest national retailer in New York City, with a total of 619 locations, a net increase of one store since 2020. Metro by T-Mobile remains the second-largest national retailer in the city at 312 stores, with a decrease of 22 stores since 2020, likely due to continued consolidations with parent company T-Mobile. Starbucks rounds out the top three, with 310 locations and a net increase of 8 stores since 2020. Completing the top ten national retailers in New York are: Subway (with 278 stores), Duane Reade/Walgreens (250), T-Mobile (241), McDonald's (191), CVS/Pharmacy (178), and Baskin-Robbins (175). There are 15 retailers with at least 100 stores across the five boroughs, up from 14 last year.

Starbucks has more stores in Manhattan than any other national retailer, with 187 total locations. In all other boroughs, Dunkin' is the top retailer with 191 locations in Queens, 138 locations in Brooklyn, 89 locations in the Bronx, and 39 locations on Staten Island. Brooklyn and the Bronx share the same list of top three chain retailers: Dunkin', Metro by T-Mobile, and T-Mobile. The top three retailers in Queens are Dunkin', Metro by T-Mobile, and T-Mobile (the same three from 2020). Manhattan's biggest three retailers are: Starbucks, Dunkin', and Duane Reade. Finally, Staten Island's top three are: Dunkin', CVS/Pharmacy, and Subway.

Among the largest pharmacy chains, Duane Reade/Walgreens remains the top pharmacy in all five boroughs except Staten Island, where CVS/Pharmacy continues to take the top spot. After Dunkin' (39), Subway remains the most popular fast-food chain in Staten Island with 18 locations. In Queens, Subway maintained its spot as the second-largest food chain at 72 stores, while Baskin Robbin's numbers decreased to 62 locations across the borough. Once again, Starbucks was the largest food retailer in Manhattan, with Dunkin' a close second at 162 locations. In Brooklyn, McDonalds maintained 50 locations between 2020 and 2021, the second-largest fast-food chain in the borough after Dunkin'. Similarly, in the Bronx, Subway was the second-highest food retailer at 41 locations, following Dunkin's 89 locations, and just beating out McDonald's' 40 locations.

Borough Trends

Our State of Chains report also charts retailer trends throughout the five boroughs. Manhattan continued to lead as the borough with the highest number of retailers, emphasized by the fact that there are significantly more retailers with majority locations in Manhattan than any other borough and more retailers in Manhattan that have no other locations in any other borough.

- Overall, 166 retailers had more locations in Manhattan than in any other borough, significantly out ranking the others. 40 retailers had more locations in Queens than in any other borough, compared to 26 in Brooklyn, 8 in the Bronx, and just 6 retailers with the most locations in Staten Island.
- 62 retailers have no locations outside Manhattan, down from last year's 80. The 2020 report saw a large increase in chains with no locations outside of Manhattan, up from 53 in 2019. The largest chains with no locations outside of Manhattan are: Chop't Salad (18), Bluemercury (15), Fresh & Co (11), La Colombe (8), Louis Vuitton (7), and Magnolia (7).

This year, just 137 out of 307 retailers (45 percent) have at least one store in the Bronx, the smallest national retailer presence of the five boroughs. In comparison, 255 out of 307 retailers (83 percent) have locations in Manhattan, 213 (69 percent) have at least one location in Brooklyn, 188 (61 percent) have locations in Queens, and 159 (52 percent) have locations in Staten Island.

Each year we add new national retailers to our ranking. This year we will be adding: IKEA, Timberland, Tacombi, Morton Williams, Sally Beauty, Tiger Sugar, Shaking Crab, Everlane, and Van Leeuwen.

Zip Code Trends

For the third consecutive year in our study, zip code 10001, home to the Hudson Yards development, as well as the Manhattan Mall and Herald Square shopping areas, claims the top spot for chain store locations with 183 stores. The area saw an increase of 18 stores, rising 11 percent from 165 stores in 2020 to 183 stores in 2021. In second place for the second year in a row was zip code 10314, home to the Staten Island Mall, with 158 stores (increasing from 153 in 2020). 10314 (New Springville) contains 35.7 percent of the total store locations located in Staten Island. Zip code 11201 (Brooklyn Heights) remained Brooklyn's most dense with chain retailers at 148 store locations, an increase of 7 percent from 2020 which vaulted it up to the third spot. The zip code with the fourth most chain store locations was 10003 (East Village) at 142, just pacing zip code 10019 (Midtown West), which closed out the top five.

In Queens, 11373 (Corona/Elmhurst), home to the Queens Center Mall, was the top zip code for chain retailer locations with 124 stores (up from 123 in 2020). Zip code 11373 is home to the Queens Center Mall. In the Bronx, zip code 10475 (Baychester/Co-op City), home to the Bay Plaza Shopping Center, has the highest number of chain stores of any zip code in that borough with 91. 10475 had a year-over-year increase of 7 percent between 2020 and 2021.

Following last year's study, which saw only six of the city's zip codes increase their number of chain locations, far more zip codes made gains in 2021. 103 zip codes (47 percent) saw an increase in the number of chain store locations. 18 different zip codes saw growth in chain store locations of 15 percent or higher. Only 53 (24 percent) of the city's zip codes saw a decrease, while the remaining 54 zip codes maintained their 2020 numbers.

The largest increase was in the 10001 zip code, where 18 stores were added in 2021. Following 10001, 10017 (Midtown East) added the second most chain stores (+14), while 11201 (Brooklyn Heights) came in third by adding 10 stores. This was followed by 10019 (Midtown West) and 11234 (Flatlands), which added 9 stores and 8 stores, respectively. Next were 11430 (JFK Airport), 10016 (Murray Hill), and 10018 (Midtown West), which added 7 stores each.

Of the 103 zip codes that saw a year-over-year increase from 2020 to 2021, a plurality (33 zip codes, 32 percent) were located within Manhattan, while Queens was a close second with 29 of them (28.2 percent). Brooklyn contained the third-highest number of zip codes that saw increases in chain store locations with 22, followed by the Bronx (12), and Staten Island (7).

Of all national retailer location in New York City, 36 percent are located within Manhattan, a plurality that has been held since the beginning of the State of the Chains reports. Queens ranks second with 23 percent. Brooklyn contains 22 percent of total chain store locations in NYC, while 13 percent are located in the Bronx and 6 percent are in Staten Island. Manhattan, Brooklyn, and Staten Island all saw an increase in their share of chain store locations between 2020 and 2021, while Queens and the Bronx saw a decrease.

Manhattan continued to rank as the borough with the highest concentration of chain store locations, with 113.5 locations per square mile, far beyond that of the other boroughs. There are 22.1 chains per square mile in Brooklyn, 22.0 per square mile in the Bronx, 15.0 per square mile in Queens, and 7.6 per square mile in Staten Island. Overall there are 23.6 chain stores per square mile, up from 23.0 per square mile in the 2020 report.

Where The Change Is Occurring

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Retailer	Number of Stores, 2021	Difference, 2020-21	Brooklyn	Bronx	Queens	Manhattan	Staten Island
DUNKIN' DONUTS	619	1	-2	1	1	-1	2
METRO BY T-MOBILE	312	-21	-4	-8	-6	-2	-1
STARBUCKS	310	8	2	1	3	2	0
SUBWAY	278	21	5	0	2	13	1
DUANE READE	250	-3	2	-1	-3	-1	0
T-MOBILE	241	-15	-8	-2	-7	2	0
MCDONALD'S	191	-7	0	0	-2	-5	0
CVS/PHARMACY	178	6	0	-1	6	2	-1
BASKIN-ROBBINS	175	4	4	-1	-9	10	0
POPEYE'S	134	18	7	3	4	3	1

Top Ten Chain Retailers in Each Borough

Top Ten Chain Retailers in Each Borough				
Bronx	Brooklyn	Manhattan	Queens	Staten Island
DUNKIN' DONUTS (89)	DUNKIN' (138)	STARBUCKS (187)	DUNKIN' DONUTS (191)	DUNKIN' DONUTS (39)
METRO BY T-MOBILE (73)	METRO BY T-MOBILE (108)	DUNKIN' DONUTS (162)	METRO BY T-MOBILE (75)	CVS/PHARMACY (19)
T-MOBILE (46)	T-MOBILE (60)	DUANE READE (104)	T-MOBILE (73)	SUBWAY (18)

Top Ten Chain Retailers in Each Borough				
Bronx	Brooklyn	Manhattan	Queens	Staten Island
SUBWAY (41)	DUANE READE (52)	SUBWAY (98)	SUBWAY (72)	METRO BY T-MOBILE (15)
MCDONALD'S (40)	MCDONALD'S (50)	CVS/PHARMACY (66)	BASKIN-ROBBINS (62)	BASKIN-ROBBINS AND STARBUCKS (12)
BASKIN-ROBBINS (33)	SUBWAY AND POPEYE'S (49)	PRET A MANGER (62)	DUANE READE (57)	7-ELEVEN (11)
DUANE READE (27)	STARBUCKS (47)	FEDEX OFFICE (54)	CVS/PHARMACY (51)	T-MOBILE, DUANE READE, BURGER KING, AND CARVEL (10)
POPEYE'S (26)	BURGER KING AND KEY FOOD (35)	CHIPOTLE MEXICAN GRILL (53)	STARBUCKS (48)	MCDONALD'S, AT&T, AND DOMINO'S PIZZA (7)
RITE AID (18)	RITE AID (34)	T-MOBILE (52)	MCDONALD'S (45)	DOLLAR TREE, WENDY'S, AND AUTOZONE (6)
BURGER KING AND DOMINO'S PIZZA (17)	AT&T AND CVS/PHARMACY (29)	UPS STORE (50)	7-ELEVEN (43)	KEY FOOD, ENTERPRISE, FAMILY DOLLAR, AND STOP AND SHOP (5)

Click here to read the full report and view our comprehensive rankings 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.

Notes

1. Center for an Urban Future analysis of employment data from New York State Department of Labor.
2. Partnership for New York City's October return-to-office survey, available from https://pfnyc.org/news/return-to-office-results-released-november.

This report is a publication of the Center for an Urban Future (CUF). Researched and written by Sara Bellan and Charles

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