

MARKET POTENTIAL ANALYSIS BY CATEGORY

The following tables represent Sales Potential and Consumer Spending Data within the Primary Trade Area (PTA) and La Porte City Limits. Consumer spending data is derived from the Bureau of Labor Statistics with ESRI forecasts for 2010 and 2015 projections. Supply estimates are sales to consumers by establishment, and exclude business to business sales. Demand estimates reflect the expected amount spent by consumers at retail outlets. A positive value (+) represents "leakage" or "under-supply" and negative values (-) reflect "over-supply". Data for this section is provided by ESRI, MediaMark and InfoUSA. Note that the following table is an aggregate of sales and demand for the La Porte PTA.

The most undersupplied categories in the La Porte PTA include:

1. Automobile Dealers (NAICS 4411): \$320,111,095

Currently, most of the automobile dealers in La Porte are located on Spencer Highway at State Highway 146 or between East Boulevard and Underwood Road. This category is also undersupplied in La Porte by \$48,420,041. Currently, in La Porte city limits, there are \$5,925,672 in sales and \$54,345,713 in demand.

2. Clothing Stores (NAICS 4481): \$90,795,203

Most of the clothing stores in La Porte are located east of State Highway 146. This category is also undersupplied in La Porte. Currently, in La Porte city limits, there are \$13,980,568 of demand and only \$1,668,168 of supply.

3. Department Stores Excluding Leased Depts. (NAICS 4521): \$50,551,857

Department stores are also undersupplied in La Porte city limits. Currently, there are \$20,498,272 of demand and \$1,006,426 of supply in this category in La Porte city limits. The major Department Store locations are San Jacinto Mall and Baybrook Mall.

4. Other General Merchandise Stores (NAICS 4529): \$43,189,455

The closest shopping area for Other General Merchandise Stores would be Pasadena

or Kemah. Currently, there is no supply within the La Porte city limits that is satisfying the \$35,617,812 demand of the residents of La Porte. A good portion of this demand is most likely being satisfied by the Walmart in Deer Park at East Boulevard and Spencer Highway.

5. Furniture Stores (NAICS 4421): \$33,651,048

There are a few furniture stores in La Porte city limits, but only making up \$320,023 in supply. There is currently a residential demand of \$4,440,693 in La Porte.

The most oversupplied categories include:

1. Gasoline Stations (NAICS 4471): -\$698,457,280

A majority of the 28 Gasoline Station locations in La Porte are located along Main Street/ Spencer Highway or Fairmont Parkway.

2. Grocery Stores (NAICS 4451): -\$244,586,150

The only major grocer in La Porte city limits is Kroger on the northwest corner of Fairmont Parkway and State Highway 146. Within La Porte city limits there is \$51,610,932 in demand and \$24,879,110 of supply (sales). From these numbers, it is apparent that over half of the grocery demand from La Porte residents is being satisfied in the surrounding areas outside of La Porte city limits.

3. Limited-Service Eating Places (NAICS 7222): -\$99,579,445

Most of the 17 Limited-Service Eating Places in La Porte are located at or near the intersection of Fairmont Parkway and State Highway 146. This category is oversupplied in the Primary Trade Area, but is undersupplied in the city limits by \$2,294,739.

4. Bldg Material & Supplies Dealers (NAICS 4441): -\$25,279,935

Building material and supplies dealers are mostly located at State Highway 225 and Battleground Road or on Broadway Street in east La Porte. This category is oversupplied in the Primary Trade Area but undersupplied in the city limits by \$7,266,354.

INDUSTRY GROUP	LA PORTE PTA			LA PORTE CITY LIMITS		
	DEMAND (RETAIL POTENTIAL)	SUPPLY (RETAIL SALES)	RETAIL GAP	DEMAND (RETAIL POTENTIAL)	SUPPLY (RETAIL SALES)	RETAIL GAP
Total Retail Trade and Food & Drink	\$4,101,783,163	\$4,487,642,414	-\$385,859,251	\$351,602,820	\$246,621,239	\$104,981,581
Total Retail Trade (NAICS 44-45)	\$3,685,589,395	\$3,975,231,528	-\$289,642,133	\$316,746,731	\$214,205,814	\$102,540,917
Total Food & Drink (NAICS 722)	\$416,193,767	\$512,410,886	-\$96,217,118	\$34,856,089	\$32,415,425	\$2,440,664

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Automobile Dealers (NAICS 4411)	\$623,317,089	\$303,205,994	\$320,111,095	\$54,345,713	\$5,925,672	\$48,420,041
Other Motor Vehicle Dealers (NAICS 4412)	\$38,449,145	\$62,515,712	-\$24,066,567	\$3,355,663	\$4,060,070	-\$704,407
Auto Parts, Accessories, and Tire Stores (NAICS 4413)	\$60,179,363	\$76,041,063	-\$15,861,700	\$5,134,040	\$26,004,800	-\$20,870,760



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Furniture Stores (NAICS 4421)	\$52,021,907	\$18,370,859	\$33,651,048	\$4,440,693	\$320,023	\$4,120,670
Home Furnishings Stores (NAICS 4422)	\$34,700,222	\$14,127,143	\$20,573,079	\$2,945,444	\$865,427	\$2,080,017
Electronics & Appliance Stores (NAICS 443/4431)	\$108,425,988	\$94,403,682	\$14,022,305	\$9,316,243	\$1,407,115	\$7,909,128
Building Material and Supplies Dealers (NAICS 4441)	\$107,132,859	\$132,412,794	-\$25,279,935	\$9,357,576	\$2,091,222	\$7,266,354
Lawn and Garden and Supplies Stores (NAICS 4442)	\$13,104,543	\$9,183,963	\$3,920,580	\$1,197,149	\$658,297	\$538,852
Grocery Stores (NAICS 4451)	\$605,786,991	\$850,373,141	-\$244,586,150	\$51,610,932	\$24,879,110	\$26,731,822
Specialty Food Stores (NAICS 4452)	\$18,465,543	\$18,360,581	\$104,962	\$1,563,559	\$1,479,354	\$84,205
Beer, Wine, and Liquor Stores (NAICS 4453)	\$27,980,664	\$38,637,978	-\$10,657,314	\$2,375,023	\$2,077,608	\$297,415
Health & Personal Care Stores (NAICS 446/NAICS 4461)	\$274,218,235	\$295,480,097	-\$21,261,862	\$23,896,408	\$19,719,725	\$4,176,683
Gasoline Stations (NAICS 447/NAICS 4471)	\$428,236,812	\$1,126,694,093	-\$698,457,280	\$37,150,020	\$112,831,785	-\$75,681,765
Clothing Stores (NAICS 4481)	\$167,224,403	\$76,429,199	\$90,795,203	\$13,980,568	\$1,668,168	\$12,312,400
Shoe Stores (NAICS 4482)	\$28,150,642	\$17,690,820	\$10,459,822	\$2,339,851	\$516,250	\$1,823,601
Jewelry, Luggage, and Leather Goods (NAICS 4483)	\$34,564,373	\$16,973,067	\$17,591,306	\$2,934,763	\$317,129	\$2,617,634
Sporting Goods/Hobby/Musical (NAICS 4511)	\$72,160,705	\$81,472,807	-\$9,312,102	\$6,145,686	\$1,946,677	\$4,199,009
Book, Periodical, and Music Stores (NAICS 4512)	\$23,332,638	\$10,767,349	\$12,565,289	\$1,964,977	\$445,302	\$1,519,675
Department Stores Excl Leased Depts. (NAICS 4521)	\$241,177,933	\$190,626,076	\$50,551,857	\$20,498,272	\$1,006,426	\$19,491,846
Other General Merchandise Stores (NAICS 4529)	\$416,976,845	\$373,787,390	\$43,189,455	\$35,617,812	\$0	\$35,617,812
Florists (NAICS 4531)	\$4,032,736	\$4,171,961	-\$139,225	\$364,014	\$394,733	-\$30,719
Office Supplies, Stationery, and Gifts(NAICS 4532)	\$23,142,379	\$23,956,404	-\$814,025	\$1,988,764	\$974,342	\$1,014,422
Used Merchandise Stores (NAICS 4533)	\$20,327,902	\$10,170,629	\$10,157,272	\$1,715,707	\$2,014,728	-\$299,021
Other Miscellaneous Store Retailers (NAICS 4539)	\$51,468,291	\$40,733,509	\$10,734,782	\$4,551,411	\$1,551,953	\$2,999,458
Full-Service Restaurants (NAICS 7221)	\$163,113,108	\$144,707,288	\$18,405,821	\$13,651,721	\$12,034,735	\$1,616,986
Limited-Service Eating Places (NAICS 7222)	\$213,013,199	\$312,592,644	-\$99,579,445	\$17,883,639	\$15,588,900	\$2,294,739
Special Food Services (NAICS 7223)	\$11,519,326	\$24,651,375	-\$13,132,049	\$959,832	\$1,281,634	-\$321,802
Drinking Places - Alcoholic Beverages (NAICS 7224)	\$28,548,134	\$30,459,578	-\$1,911,445	\$2,360,897	\$3,510,156	-\$1,149,259

(Source: ESRI)