

BOSTON SUPERMARKETS 2006 GROWTH AND OPPORTUNITY 23 LARGE SUPERMARKETS OPEN IN BOSTON

The notable expansion of national chain supermarkets throughout Boston over the past fourteen years signals the rediscovered vitality of inner cities. With seven times greater concentration of income in the city than in the suburbs (an overwhelming \$257 million per square mile as opposed to \$35 million in Boston's suburban areas) supermarket chains are consistently choosing to invest in our urban communities due to this market potential. This increased competition is a welcome sign and has led to both growth and consolidation of food markets throughout the city's neighborhoods.

Historically, Boston owes a great deal to the small-scale specialty stores that dot its landscape—not just the famous “mom and pop” spas but the mid-sized grocery stores that, for decades have symbolized the close-knit fabric of its distinctive neighborhoods. Still, the benefits brought about by larger, newer stores are a necessary component to a balanced commercial economy. Larger markets, such as the “super-sized” Stop and Shop at the South Bay Mall which opened in the fall of 1995, generally offer shoppers a wider selection of products at lower prices. This lessens the travel burden of neighborhood shoppers who may be looking to stock up on items at a lower cost. Centers like South Bay Mall—at which there are now two significant food stores serving the communities of Roxbury, Dorchester, and South Boston—are providing shopping options for those Boston neighborhoods, while successful store openings are beginning to take hold in the Downtown area as well.

INTRODUCTION | Since the early 90s, more than 23 large supermarkets with over 700,000 square feet of new, replacement or expansion space, have opened up in seventeen Boston neighborhoods. This expansion of the supermarket industry within Boston demonstrates that the buying power of inner-city neighborhoods has been rediscovered, and it's just one more sign that Boston's economy remains strong. As neighborhoods have been rejuvenated, community participation encouraged, and streetscape and transportation enhancements added, large supermarkets have flourished throughout Boston.

FROM CORNER STORES TO SUPERMARKETS 1950–1990 | When the retail food industry began to change across the country in the early 1950s, Boston was no exception. Large supermarkets (defined within the industry as stores that occupy more than 10,000 square feet of selling space or with annual sales of more than \$2 million) gradually began to replace smaller, neighborhood food providers. “Corner stores” until this point, had been where Boston residents were accustomed to shopping for basic food necessities. According to one retail authority, between 1950 and 1990, as many as 600 small food supply stores in Boston closed to make way for 20 to 30 larger supermarkets.

1990–1992 | Up until the 1990s, Boston had watched as small neighborhood markets consistently closed their doors to make way for larger stores. In 1992, however, the dynamics briefly shifted. Four large supermarkets—totaling more than 85,000 square feet—closed their doors, leaving their surrounding neighborhoods with fewer shopping resources and city officials with growing concern. Gallivan Boulevard's Flanagan's Market and Stop and Shop closed in Dorchester, as well as a Family Foodland on Morton Street in Mattapan, and an A&P on Tremont Street in the South End. City officials wondered if these closings signaled a lack of confidence on the part of the supermarket industry. Then, large stores of this nature seemed more interested in expanding in the suburbs where median incomes were higher and land was cheaper.

1993 | But it wasn't long before four new stores—totaling over 100,000 square feet—came on the scene. In the Upham's Corner area of Dorchester, America's Food Basket opened at 780 Dudley Street—utilizing an expansion opportunity to an adjacent city-owned parking lot. In Brighton, a Bread and Circus—now Whole Foods—specializing in natural foods, replaced a Stop and Shop supermarket on Washington Street. The largest two supermarkets to open in the early 90s city; rather than leaving for the suburbs, they were heavily invested in Boston's neighborhoods. And this was only the beginning.

1993–1994 | In 1993, a Super Stop and Shop was built as the South Bay Mall's “anchor store” signifying an ambitious and successful development at the intersection of Dorchester, South Boston, and Roxbury. After a renovation on a site just across the way from the store's original location, the 70,000+ square foot store, remains Boston's largest supermarket. Its unwavering popularity since its arrival underscores the strength of Boston's inner-city retail market.

Also, a smaller but similarly popular Super 88 Market opened on Herald Street in the South End, catering largely to the area's Southeast Asian population, both in and around Boston.

1994–1995 | In response to Stop and Shop's discovery of the buying power in Boston's neighborhoods, Star Market—now Shaw's—undertook its own expansion in the area. Shaw's markets opened first on Commonwealth Avenue in Brighton in 1994, then on Spring Street in West Roxbury the following year, and finally on Western Avenue in Allston and on Morrissey Boulevard in Dorchester in 1997. Additionally, Shaw's Hyde Park store had undergone an expansion two years earlier, in 1995.

During the same period, a Bread and Circus/Whole Foods opened in the Fenway neighborhood and a second America's Food Basket replaced local chain store Flanagan's market in Hyde Park. Additionally, a new Shaw's opened on Border Street in East Boston.

1997–1998 | In the late 90s, the opening of two new supermarkets became local symbols of success, made possible by extensive collaboration between residents and City officials. Roslindale's The Village Market opened in 1998, after several years of partnering negotiations by community and city representatives through Roslindale's Main Streets program. Three years later, the opening of a Stop and Shop at the Grove Hall Mecca shopping center highlighted the successful campaign run by Roxbury neighbors and the City to revive a central section of Blue Hill Avenue. Both supermarket victories proved key to the resurgence of these two Boston neighborhoods.

Also, a Stop and Shop replaced another Flanagan's market in South Boston. The largest supermarket to open during the late 90s was a Super 88 Market at South Bay Mall, which, at nearly 40,000 Square Feet and situated adjacent to the Super Stop and Shop that had opened just 6 years earlier, was dramatic proof of the strength of both the urban and ethnic markets in Boston.

2000–2006 | At the turn of the millennium, the strength of the city's economy and the purchasing power of its residents continued to generate demand for still more supermarkets.

In 2003, a third Super 88 Market opened in Brighton and a brand new Roche Brothers opened on Centre Street in West Roxbury, doubling its selling space just a short distance from where it had been previously located. Also that same year, a new Shaw's supermarket opened on Huntington Avenue at the Prudential Center to replace the previously existing Star Market on Boylston Street. A new Shaw's on River Street in Dorchester's Lower Mills replaced a Star Market just several blocks away. A new Stop and Shop reached completion on Tremont Street in Mission Hill, serving the large medical community at Brigham Circle as well as the surrounding residential neighborhoods. Downtown, Whole Foods opened on Cambridge Street in the Charles River Plaza in the fall of 2005—replacing a former Stop and Shop—serving Beacon Hill residents as well as the diverse daytime crowd.

At the beginning of 2006, three America's Food Basket stores closed—one in Upham's Corner, another in South Dorchester, and a third in Hyde Park. The City is currently working closely with new potential owners to re-open two of the stores—in Hyde Park and South Dorchester.

CONCLUSION/2006 BOSTON'S SUPERMARKET FUTURE: INVESTMENT ON THE RISE |

With planning well underway for a brand new Stop and Shop to be located on Boston's new Rose Kennedy Greenway, and efforts to identify and recruit additional supermarkets that would serve the downtown area already in progress, it is clear that Boston's economy is alive and well. The combination of savvy business investment, effective community participation, and smart city planning has allowed new supermarkets, offering a wide selection of affordably priced food, to flourish within Boston and its neighborhoods.



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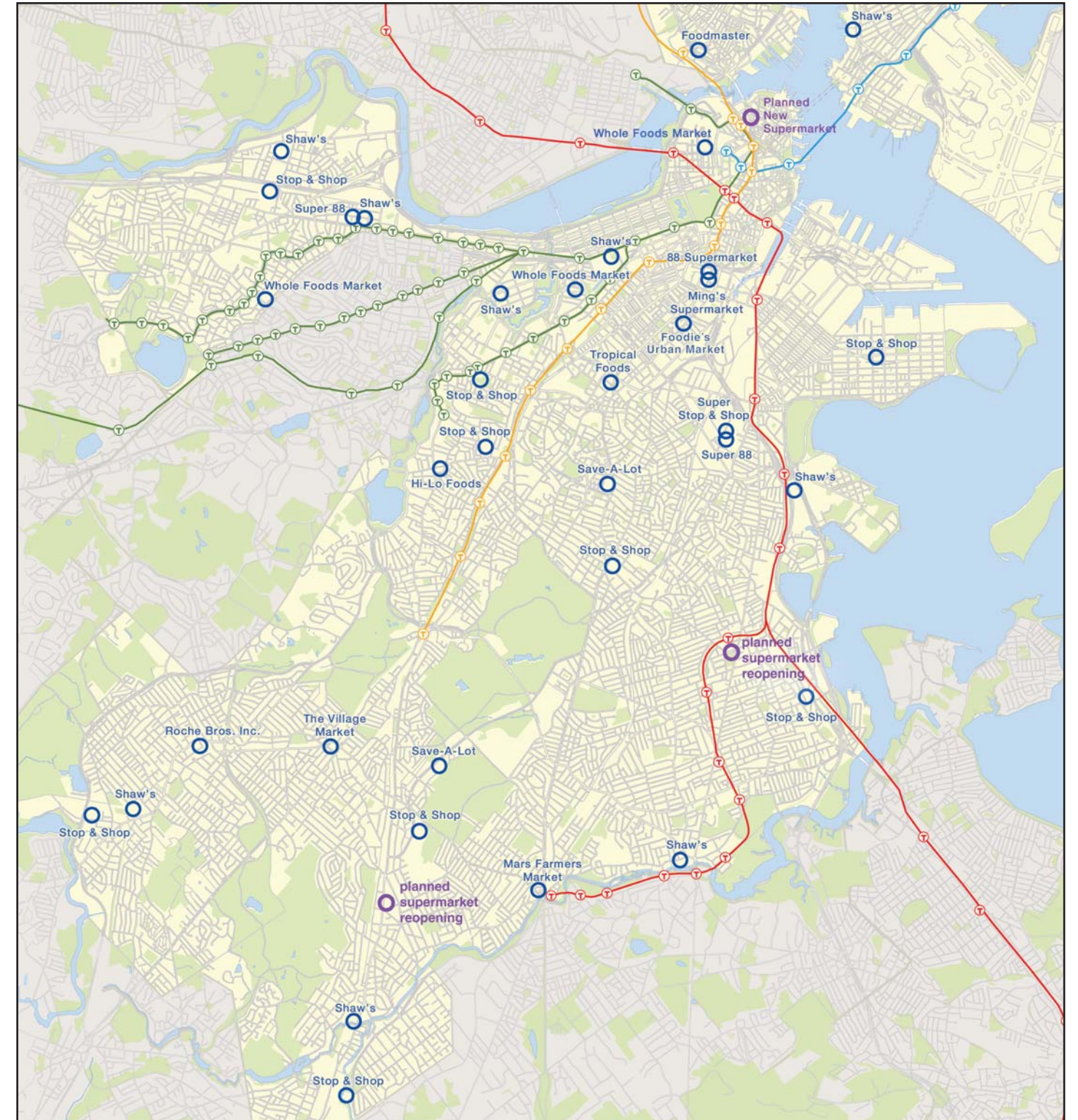
Growth and Opportunity

SUPERMARKETS IN BOSTON TODAY | Stores Existing Prior to 1992 and Stores Opened Since (greater than 10,000 sf. or more than \$2 million in sales)

NEIGHBORHOOD	STORE	ADDRESS	YEAR	SELLING SPACE	TYPE
Allston	Shaw's	370 Western Avenue	1997	41,000	new
Back Bay	Shaw's	65 Huntington Avenue	2003	35,000	replacement
Brighton	Whole Foods Market	15 Washington Street	1992	20,000	new
Brighton	Shaw's	1075 Commonwealth Avenue	1994	47,000	new
Brighton	Super 88	1095 Commonwealth Avenue	2002	20,000	new
Brighton	Stop&Shop	60 Everett Street	1992	50,800	new
Charlestown	Foodmaster	51 Austin Street	pre-1992	20,000	existing
Dorchester	Shaw's	45 Morrissey Blvd.	1997	34,000	new
Dorchester	Shaw's	4 River Street	2003	43,000	new
Dorchester	Stop&Shop	535 Freeport Street	pre-1992	22,050	existing
Dorchester	Super 88	101 All State Rd./South Bay Mall	1999	38,000	new
Dorchester	Super Stop&Shop	8 All State Rd./South Bay Mall	1993	68,150	new
East Boston	Shaw's	246 Border Street	1997	45,000	new
Fenway	Whole Foods Market	15 Westland Avenue	1995	11,000	new
Fenway	Shaw's	33 Kilmarnock Street	pre-1992	19,000	existing
Hyde Park	Shaw's	1377 Hyde Park Avenue	1995	39,000	expansion
Hyde Park	Stop&Shop	1025 Truman Highway	pre-1992	19,700	existing
Jamaica Plain	Hi Lo Foods	413 Centre Street	pre-1992	10,000	existing
Jamaica Plain	Stop&Shop	301 Centre Street	1995	32,600	new
Mattapan	Mars Farmers Market	926 Cummins Highway	pre-1992	12,000	existing
Mission Hill	Stop&Shop	1620 Tremont Street	2003	17,000	new
Roslindale	Save A Lot	650 American Legion Highway	pre-1992	15,000	existing
Roslindale	Stop&Shop	950 American Legion Highway	pre-1992	19,250	existing
Roslindale	The Village Market	26 Corinth Street	1998	15,000	new
Roxbury	Save A Lot	333 MLK Blvd.	pre-1992	17,500	existing
Roxbury	Stop&Shop	460 Blue Hill Avenue/Grove Hall Mecca	2001	24,333	new
Roxbury	Tropical Foods	2101 Washington Street	pre-1992	8,500	existing
South Boston	Stop&Shop	713 East Broadway	2001	15,000	new
South End	Foodie's Urban Market	1421 Washington Street	2005	8,500	replacement
South End	Ming's Supermarket	1102 Washington Street	pre-1992	15,000	existing
South End	88 Supermarket	50 Herald Street	1993	12,000	new
West End	Whole Foods Market	181 Cambridge Street	2005	20,000	replacement
West Roxbury	Roche Brothers	1804 Centre Street	2002	42,000	replacement
West Roxbury	Shaw's	75 Spring Street	1995	42,000	new
WestRoxbury	Stop&Shop	1230 VFW Parkway	2004	36,800	replacement
TOTAL EXISTING	11		Pre - 1992	203,300	
TOTAL NEW	18		Post-1992	585,883	
TOTAL REPLACEMENT OR EXPANSION	6		Post-1992	181,300	
GRAND TOTAL	35		2006	970,483	

PLANNED

North End	New Supermarket	Canal and Causeway Streets	2007+	to be determined	new
Dorchester	Planned new market	500 Geneva Avenue	2006	to be determined	existing
Hyde Park	Planned new market	942 Hyde Park Avenue	2006	to be determined	new



CITY OF BOSTON
 Thomas M. Menino
 Mayor