

Local Food Supply and Market Demand in the WMA Region

Retail MarketPlace Profile

Prepared by

DMAs: BALTIMORE, WASH DC (HAG)

Summary Demographics

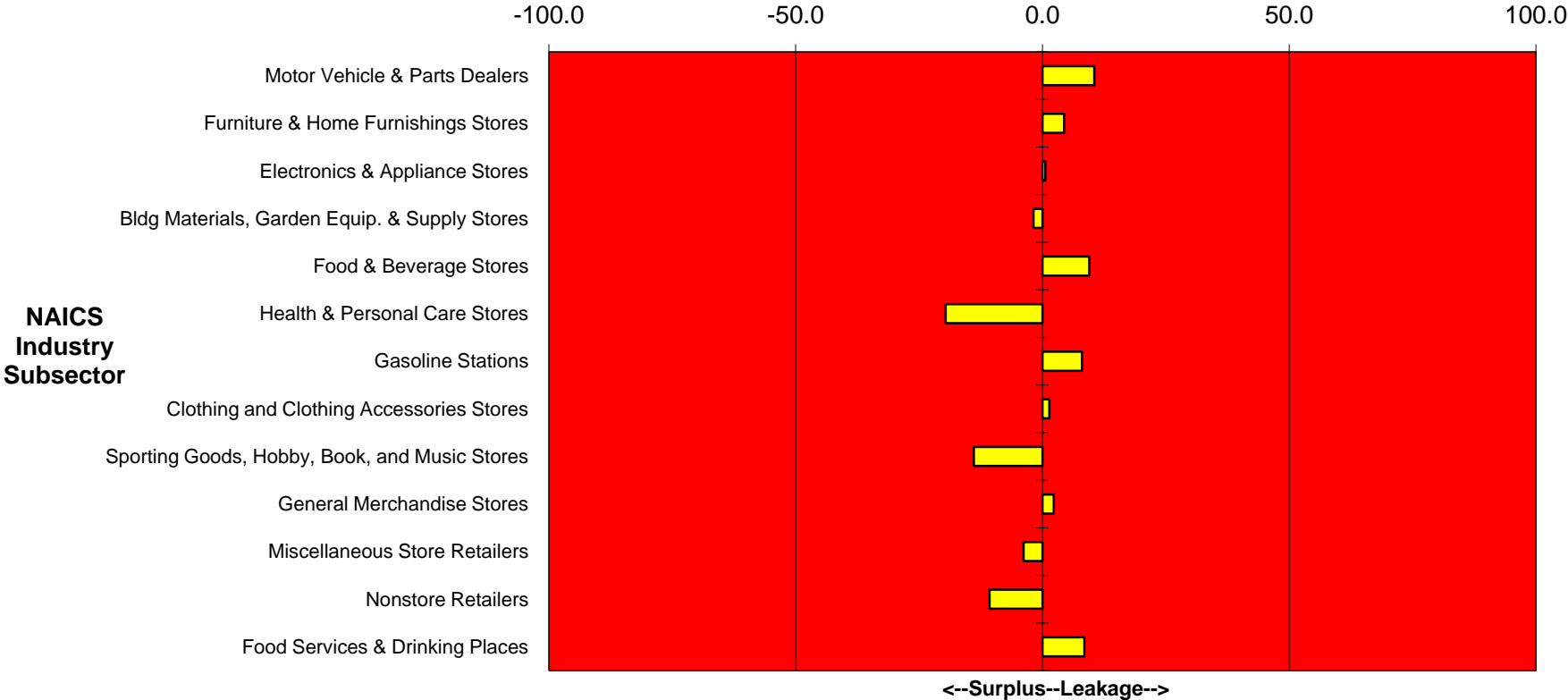
2007 Population	9,136,237
2007 Households	3,457,014
2007 Median Disposable Income	\$52,776
2007 Per Capita Income	\$36,394

Industry Summary

Industry Summary	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap (Demand - Supply)	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$128,376,817,244	\$116,783,012,543	\$11,593,804,701	4.7	63,434
Total Retail Trade (NAICS 44-45)	\$110,745,217,966	\$101,908,411,052	\$8,836,806,914	4.2	46,026
Total Food & Drink (NAICS 722)	\$17,631,599,278	\$14,874,601,491	\$2,756,997,787	8.5	17,408
Food & Beverage Stores (NAICS 445)	\$22,352,448,507	\$18,458,314,292	\$3,894,134,215	9.5	6,088
Grocery Stores (NAICS 4451)	\$20,265,637,247	\$16,588,302,755	\$3,677,334,492	10.0	3,558
Specialty Food Stores (NAICS 4452)	\$666,577,572	\$521,936,297	\$144,641,275	12.2	1,201
Beer, Wine, and Liquor Stores (NAICS 4453)	\$1,420,233,688	\$1,348,075,240	\$72,158,448	2.6	1,329

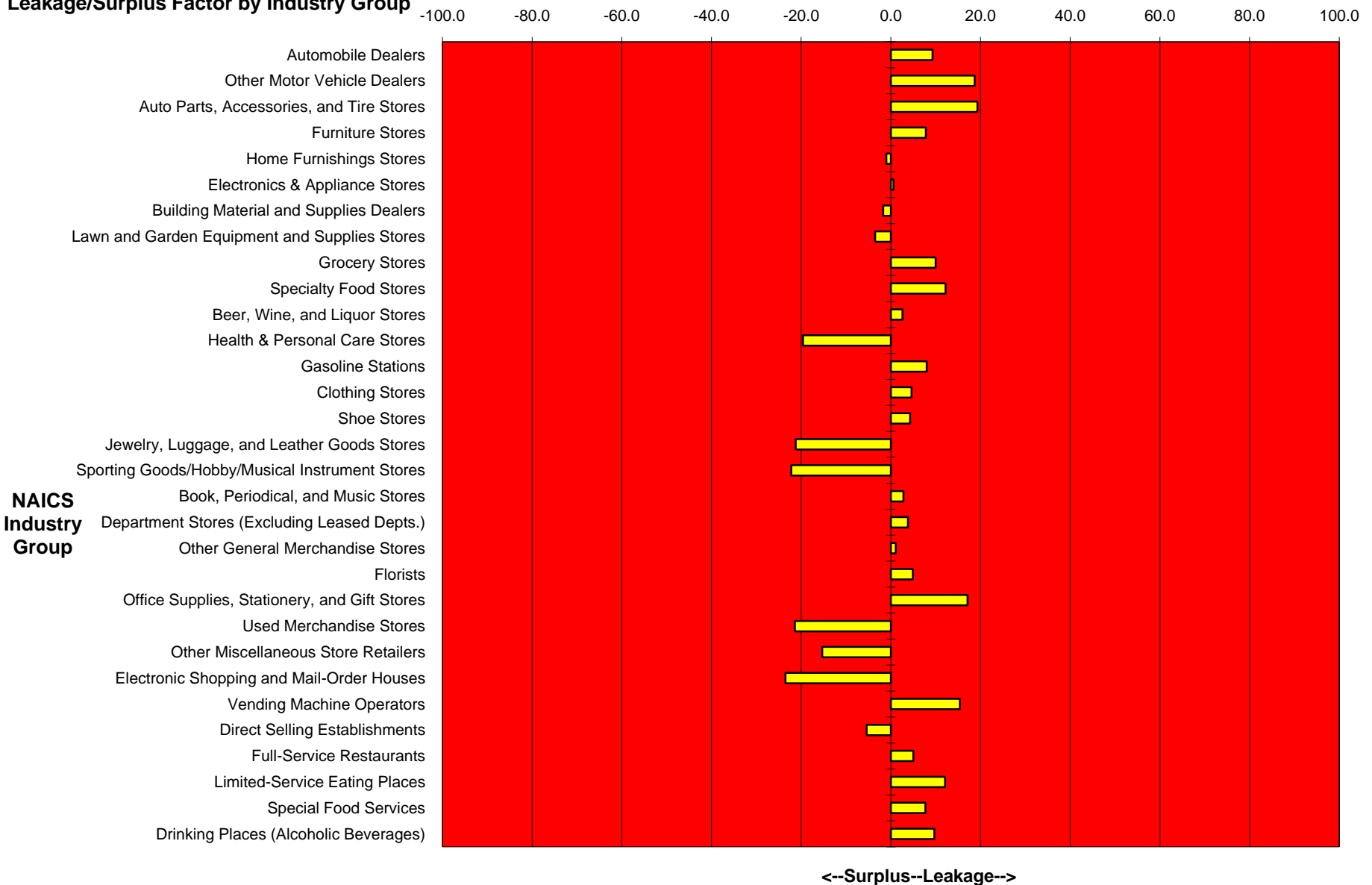
Baltimore/Washington, DC

Leakage/Surplus Factor by Industry Subsector



Baltimore/Washington, DC

Leakage/Surplus Factor by Industry Group





Frederick County, MD

Retail MarketPlace Profile

Prepared by

Counties: Frederick, MD

Summary Demographics

2008 Population	232,104
2008 Households	84,065
2008 Median Disposable Income	\$57,677
2008 Per Capita Income	\$33,907

Industry Summary

	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap/Leakage/Surplus (Demand - Supply)	Factor	Number of Businesses
Total Retail Trade and Food & Drink (NAICS 44-45, 722)	\$2,993,155,996	\$2,521,603,806	\$471,552,190	8.6	1,652
Total Retail Trade (NAICS 44-45)	\$2,579,638,305	\$2,186,819,697	\$392,818,608	8.2	1,230
Total Food & Drink (NAICS 722)	\$413,517,691	\$334,784,109	\$78,733,582	10.5	422
Food & Beverage Stores (NAICS 445)	\$582,892,590	\$504,299,131	\$78,593,459	7.2	142
Grocery Stores (NAICS 4451)	\$545,479,981	\$440,844,025	\$104,635,956	10.6	72
Specialty Food Stores (NAICS 4452)	\$5,555,851	\$34,933,604	-\$29,377,753	-72.6	25
Beer, Wine, and Liquor Stores (NAICS 4453)	\$31,856,758	\$28,521,502	\$3,335,256	5.5	45

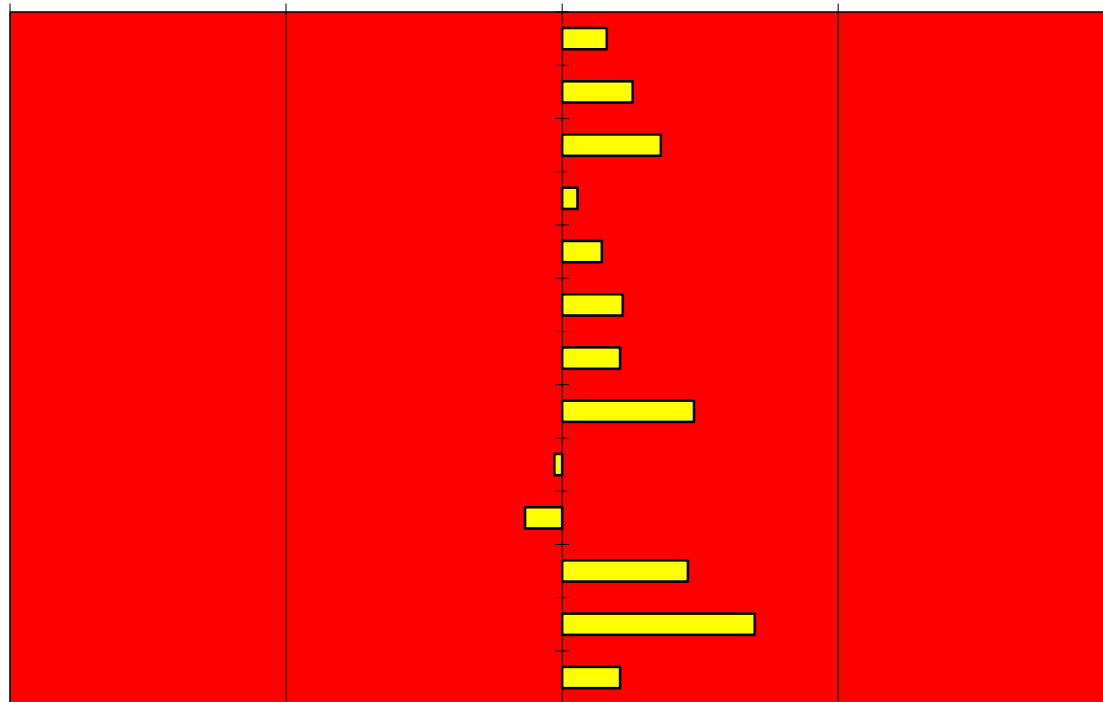
Frederick County, MD

Leakage/Surplus Factor by Industry Subsector

-100.0 -50.0 0.0 50.0 100.0

**NAICS
Industry
Subsector**

- Motor Vehicle & Parts Dealers
- Furniture & Home Furnishings Stores
- Electronics & Appliance Stores
- Bldg Materials, Garden Equip. & Supply Stores
- Food & Beverage Stores
- Health & Personal Care Stores
- Gasoline Stations
- Clothing and Clothing Accessories Stores
- Sporting Goods, Hobby, Book, and Music Stores
- General Merchandise Stores
- Miscellaneous Store Retailers
- Nonstore Retailers
- Food Services & Drinking Places



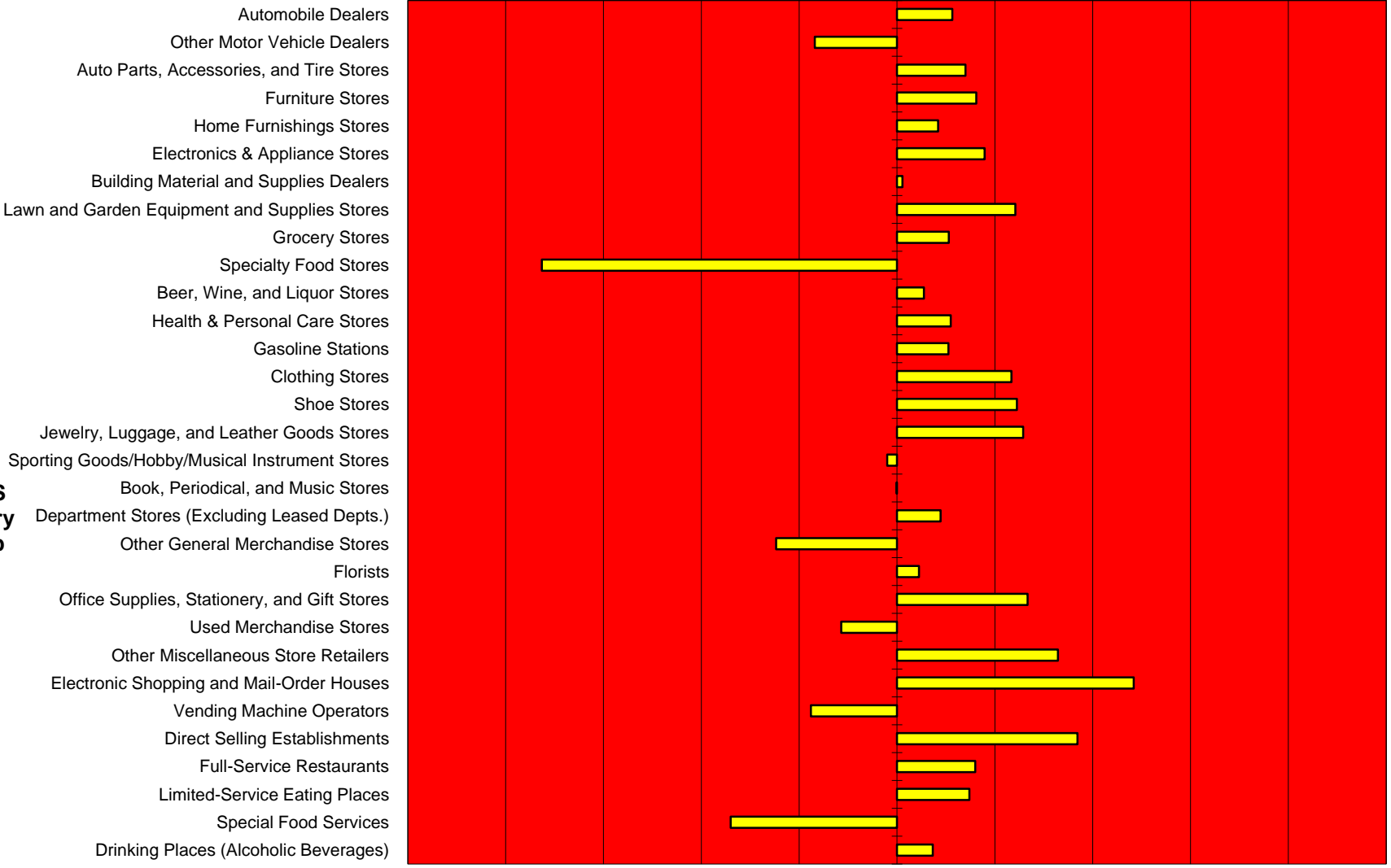
<--Surplus--Leakage-->

Frederick County, MD

Leakage/Surplus Factor by Industry Group

-100.0 -80.0 -60.0 -40.0 -20.0 0.0 20.0 40.0 60.0 80.0 100.0

**NAICS
Industry
Group**



<--Surplus--Leakage-->

What is your general “sense” of supply versus demand in the WMA Region?

What are we still ahead of in terms of supply?

Do you see any emerging trends?

What is the restaurant related demand?

How do we increase supply?

Where do we see supply vs. demand in the WMA region 5-10 years down the road?