



VILLAGE OF LOMBARD:

RETAIL LEAKAGE AND SURPLUS ANALYSIS

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TIMEFRAME JANUARY 1, 2026-MARCH 28, 2026

The Retail Leakage and Surplus Analysis examines the quantitative aspect of the community's retail opportunities. It is a guide to understanding retail opportunities, but it is not an analysis that indicates unconditional opportunities. The analysis is sometimes called "a gap analysis" or "a supply and demand analysis" and can aid in the following:

- Indicating how well the retail needs of local residents are being met
- Uncovering unmet demand and possible opportunities
- Understanding the strengths and weaknesses of the local retail sector
- Measuring the difference between actual and potential retail sales

Understanding Retail Leakage

Retail leakage means that residents are spending more on products than local businesses capture. Retail sales leakage suggests that there is unmet demand in the trade area and that the community can support additional store space for that type of business. However, retail leakage does not necessarily translate into opportunity. For example, there could be a strong competitor in a neighboring community that dominates the market for that type of product or store.

Understanding Retail Surplus

A retail surplus means that the community's trade area is capturing the local market plus attracting non-local shoppers. A retail surplus does not necessarily mean that the community cannot support additional business. Many communities have developed strong clusters of stores that have broad geographic appeal.

Examining the quantitative aspects (Leakage/Surplus) is only part of the evaluation of community's retail opportunities. Before any conclusions can be drawn about potential business expansion or recruitment opportunities, qualitative considerations such as trade area psychographics and buying habits must be analyzed in context of other market factors.

Figure 1: Residential Retail Leakage Analysis (Top 30)

Category	# of Properties	Visits
Community Shopping Centers	80	331,900
Neighborhood Centers	100	262,000
Strip/Convenience	100	207,200
Grocery Store	49	175,300
Big Box Store	72	144,600
Fast Food Restaurant	56	136,200
Full Site - Convenience Store	74	121,300
Gas Station	66	115,200
Supermarket	40	109,200
Super-Regional Malls	19	102,100
Gym / Fitness Center	49	83,200
Full Site - Gas Station	31	77,400
Warehouse Store	24	69,900
University	31	69,800
Car Wash	95	67,500
Drugstore / Pharmacy	94	65,800
General Hospital	59	61,400
Hardware Store	93	58,800
Convenience Store	25	52,300
Coffee Shop	33	49,800
Community College	18	47,600
Lifestyle Centers	20	45,100
Discount Store	93	44,200
Power Centers	16	43,100
Office	85	42,300
Bank	96	40,400
Hot Dog Joint	7	35,900
Department Store	89	35,700
Shopping Center	20	32,400

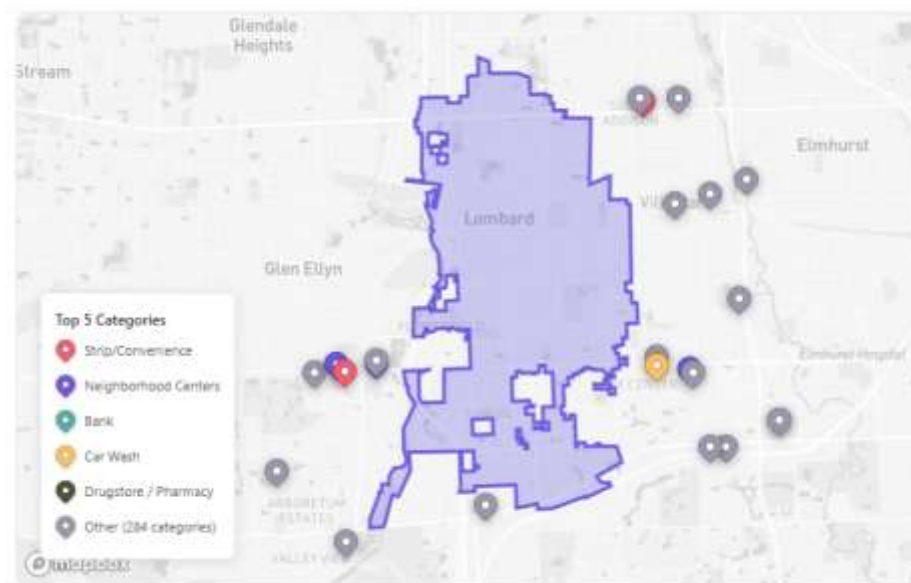


Figure 2: Market Unmet Demand

The gap between consumer demand and available retail supply based on STI Market Outlook data.

Category	Demand (\$)	Supply (\$)	Unmet Demand (\$)
Other Motor Vehicle Dealers	\$6.8M	\$1.7M	\$5.1M
Lawn & Garden Equipment & Supplies Stores	\$10.7M	\$8.7M	\$2.0M
Used Merchandise Stores	\$4.6M	\$2.7M	\$1.9M
Florists And Miscellaneous Store Retailers	\$1.8M	\$1.3M	\$473.4K
Specialty Food Stores	\$4.1M	\$5.3M	\$-1.1M
Book, Periodical, & Music Stores	\$3.3M	\$5.7M	\$-2.5M
Bars/Drinking Places (Alcoholic Beverages)	\$8.4M	\$11.4M	\$-3.0M
Shoe Stores	\$6.0M	\$9.5M	\$-3.5M
Direct Selling Establishments	\$5.3M	\$10.2M	\$-4.9M
Jewelry, Luggage, & Leather Goods Stores	\$5.1M	\$10.2M	\$-5.1M
Gasoline Stations	\$93.9M	\$99.8M	\$-5.9M
Office Supplies, Stationery, & Gift Stores	\$4.3M	\$10.8M	\$-6.5M
Other General Merchandise Stores	\$101.6M	\$109.0M	\$-7.4M
Beer, Wine, & Liquor Stores	\$11.3M	\$19.1M	\$-7.8M
Health & Personal Care Stores	\$71.8M	\$80.1M	\$-8.3M
Electronics & Appliance Stores	\$16.4M	\$25.0M	\$-8.6M
Special Food Services	\$16.2M	\$25.2M	\$-9.0M
Sporting Goods, Hobby, & Musical Instrument Stores	\$11.0M	\$20.6M	\$-9.6M
Furniture Stores	\$11.4M	\$22.3M	\$-10.8M
Other Miscellaneous Store Retailers	\$12.8M	\$25.3M	\$-12.4M
Home Furnishings Stores	\$10.2M	\$26.7M	\$-16.5M
Department Stores	\$17.6M	\$40.0M	\$-22.4M
Building Material & Supplies Dealers	\$54.8M	\$78.6M	\$-23.8M
Automotive Parts, Accessories, & Tire Stores	\$19.3M	\$45.9M	\$-26.5M
Electronic Shopping & Mail-Order Houses	\$185.1M	\$214.9M	\$-29.9M
Automobile Dealers	\$187.9M	\$249.5M	\$-61.6M
Clothing Stores	\$36.2M	\$97.8M	\$-61.6M
Limited-Service Eating Places	\$78.5M	\$144.8M	\$-66.3M
Full-Service Restaurants	\$78.2M	\$147.7M	\$-69.5M
Grocery Stores	\$92.7M	\$177.8M	\$-85.2M