



# National Retailer & Restaurant Expansion Interactive Guide



Welcome to the inaugural edition of our National Retailer and Restaurant Expansion Guide. Our goal is to make this guide the most comprehensive publication of its kind in the marketplace. To that end, the information presented here is gathered from a wide variety of sources. We use intelligence gathered by our brokers, shared with us by retailers, data from third-party vendors and a host of other parties. We subscribe to the quarterly SEC reports of hundreds of publicly traded retailers and restaurant chains. We also scour hundreds of daily newspapers, business journals, trade magazines and nearly every other media source there is to gather information on retailer growth plans.

There is no way to list the plans of every single retailer in the U.S., but our goal is to put together the most comprehensive study of expansion plans that exists within the industry. We hope that you will find this an invaluable tool for analyzing the marketplace whatever your involvement in commercial real estate may be, whether you are a retailer, landlord, broker, investor, appraiser or just interested in retail trends.

Brought to you by:

**Garrick H. Brown**  
 Chainlinks Research Director  
 916.329.1558  
 gbrown@terrnomics.com

**Matt Kircher**  
 ChainLinks President  
 650.931.2220  
 mkircher@terrnomics.com



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Chain	Planned Units	Footprint	Regions
AMC Theaters	AMC only opened one new unit in 2010. Whether the chain grows in 2011 is up in the air, if it does it will be by three units or less	50,000 to 80,000 sf	Multiple US Markets
American Eagle/aerie	We expect between 5 and 10 new over the next 18 months.	4,500 to 6,500 sf	Multiple US Markets
America's Tire/Discount Tire	These sister chains added about 35 new stores in 2010 and are expected to match that pace in 2011.	8,500 sf	Multiple US Markets
Angel Tips Nail Salons	We expect this chain to add as many as four units in the next 18 months.	800 to 3,000 sf	CT, NJ, NY
Ann Taylor	Ann Taylor plans on opening 35 Ann Taylor Loft stores and as many as five factory outlets in 2011.	4,000 to 8,000 sf	Multiple US Markets
Anna's Linens	They closed 2010 with about 23 new openings. We expect this number to surpass 25 units in 2011.	6,000 to 15,000 sf	Multiple US Markets
Annie Sez	Chain is looking to expand over the next 18 months—our sources say likely by a minimum of five units.	10,000 to 12,000 sf	Eastern US
Apple	Apple will add at least 50 new stores in 2011, though many will be overseas. We expect at least 20 new domestic locations.	2,000 to 4,000 sf	Multiple US Markets
Arden B/Wet Seal	Most of Wet Seal's growth in 2011 will be through its namesake concept but we are told that Arden B will likely add at least a handful of new units as well.	3,900 sf	Multiple US Markets
AT&T	The company now has over 2,200 company-owned stores and continues to expand. Growth numbers have not been released, but we expect a minimum of 100 new units in 2011.	3,000 to 3,200 sf	Multiple US Markets
Aubuchon Hardware	Growth totals have not been released, but we expect as many as 10 new units over the next 24 months.	6,800 sf	Northeast US
Auto Barn Stores	Chain is looking to add units in 2011, but total number not disclosed. Believed to be less than five.	5,000 to 8,000 sf	New York
Auto Tech	Chain is looking to add units in 2011, but total number not disclosed. Believed to be less than three.	6,000 sf	Indiana
Automotive Supply	Chain is looking to add units in 2011, but total number not disclosed. Believed to be less than four.	4,500 to 8,500 sf	MI, WI
Autozone	Autozone is expected to add at least 165 new stores in 2011.	6,000 to 10,000 sf	Multiple US Markets
Bakers Footwear	Bakers would like to open as many as six new units in 2011.	2,000 to 2,400 sf	Multiple US Markets
Banana Republic	The Republic closed 2010 with 10 closures and 5 openings. We expect the chain to return to growth in 2011, but it will likely be a handful of stores at most.	6,000 to 7,000 sf	Multiple US Markets
Barnes & Noble	B&N is in consolidation mode. The chain is looking at closing as many as ten stores each of the next three years. It also has 435 leases expiring through 2014, some of which will not be renewed. An acquisition or even possible merger with Borders would likely increase the pace of consolidations. The chain may open less than a handful of new stores in the coming year, but these will be far outpaced by closures.	25,000 to 35,000 sf	Multiple US Markets

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“Bed, Bath & Beyond may be opening as many as 60 new stores over the next 18 months.”

Chain	Planned Units	Footprint	Regions
Bartell Drugs	This regional pharmacy chain is hoping to expand in 2011. We expect as many as three new units over the next 18 months.	15,000 sf	Pacific Northwest
Bass Pro Shops	Bass has not released figures, but we know of at least three projects where deals are inked and where new stores may be in place over the next 18 months. New Orleans will likely be their next grand opening.	175,000 to 350,000 sf	Multiple US Markets
Bath & Body Works	They will primarily be looking to Canada for expansion with most 2011 growth slated for outside the US. Still, there will likely be at least 5 to 10 US openings in the coming months.	2,500 sf	Multiple US Markets
Beall's Outlet Stores/Burke's Outlet Stores	Beall's and sister-chain Burke's are looking to grow in 2011, but total growth projections have not been disclosed. Our sources tell us to expect somewhere in the neighborhood of ten new stores, though this number may increase if the recovery picks up velocity later in the year.	20,000 to 25,000 sf	Multiple US Markets
Bed, Bath & Beyond	Current plans call for at least 60 new stores over the next 18 months.	Can take between 20,000 and 75,000 sf, but sweet spot is 35,000 sf	Multiple US Markets
Best Buy	Best Buy is looking to grow aggressively both via its namesake brand and new Mobile stores in 2011. Growth projections have not been released, but we expect as many as 50 units in 2011.	30,000 to 40,000 sf	Multiple US Markets; Northeast US
Best Buy Mobile	Best Buy Mobile opened about 100 new stores in 2010 and should surpass this level in 2011. Look for at least 100 new units and possibly as many as 150.	3,000 sf	Multiple US Markets
BevMo!	We expect at least five new units.	+/- 20,000 sf	Western US
Big 5 Sporting Goods	Big 5 used to average 15 new stores annually before the recession. Our sources tell us to expect them to come in at about 10 new units in 2011.	11,000 sf	Western US
Big League Barbers	This chain is looking to add as many as 10 new units in 2011.	1,000 to 1,400 sf	Eastern US
Big Lots!	Planning on opening as many as 90 stores nationally through 2011.	20,000 to 30,000 sf	Multiple US Markets
Big Saver Foods	Regional discount grocery chain is looking to expand in Northern California. Numbers have not been released, but our sources tell us that there could be as many as four new units in the next 24 months.	20,000 to 40,000 sf	Northern California
BI-Mart	Chain is looking to add units in 2011, but total number not disclosed. Believed to be less than five.	30,000 sf	Pacific Northwest
BJ's Wholesale Club	BJ's recently closed five under performers while opening one new location. 2011 expansion likely to be subdued, though this may change if the chain is sold. The company's stated goal is to add at least 7 new clubs annually over the next few years.	100,000+ sf	Northern US
Blinds To Go	Blinds To Go would like to open as many as nine new stores over the next 18 months. About half of these would be in Canada.	3,000 to 4,000 sf	NJ; NY

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Blockbuster	Blockbuster Video remains in consolidation mode as it gradually shifts from a bricks and mortar retailer to being an online presence. Expect closures to be in the hundreds, if not thousands, of locations this year as the retailer works through bankruptcy.	4,000 to 5,000 sf	Multiple US Markets
Bloomingdale's, The Outlet Store/ Macy's	Bloomingdale's, The Outlet Store opened its first three stores in 2010. Though plans have not yet been released, parent Macy's has indicated that if these stores did well that a rapid rollout in 2011 could follow.	25,000 sf	Multiple US Markets
Bob's Carpet Mart	This regional chain would like to expand and is currently looking for space. Growth numbers have not been released but our sources tell us they could be adding as many as three new units over the next 18 months.	5,000 to 10,000 sf	Florida
Body Central	Body Central has plans for as many as 35 new units in the coming year.	3,200 to 5,200 sf	Mid-Atlantic, Midwest and Southern US
Body Shop, The	Body Shop is looking for international growth in 2011. They opened 22 stores in 2010. They will likely hit 25 in 2011, but it is doubtful that more than a handful of these will be in the U.S.	800 to 1,000 sf	Multiple US Markets
BonWorth	BonWorth added about 10 stores in 2011 and reportedly wants to keep at least that pace in 2011.	1,300 to 3,300 sf	Mid-Atlantic, Midwest
Books-A-Million	Books-A-Million plans on continuing its strategy of cautious growth in 2011. Numbers have not been released, but we expect the chain will likely add 4 or 5 units.	15,000 to 20,000 sf	Eastern US
Borders	Borders filed for Chapter 11 bankruptcy protection in mid-February and announced plans to close 275 stores (one third of their locations) by late April. The real question is whether there will be more closures beyond that. A buyout or merger could boost those totals.	25,000 to 35,000 sf	Multiple US Markets
Bottom Dollar Food/Food Lion/ Delhaize	While Delhaize is expected to quietly close under performers in their mid-price range concepts like Food Lion in 2011, they are ramping up growth for their new discount concept, Bottom Dollar Food. Bottom Dollar is expected to add as many as 110 stores nationally this year. Up to 36 new Pennsylvania stores are planned over just the next few years.	30,000 to 50,000 sf	Multiple US Markets
Brookstone	The gadget store is expected to open no more than 10 permanent locations in 2011, but look for this chain to become a permanent player in the pop-up world. They opened about 150 seasonal stores in 2010. This number may increase in 2011.	3,000 sf for regular stores... 1,000 to 2,000 sf for pop-ups.	Multiple US Markets
Buckle, The	The Buckle opened 9 new stores in 2010. It will likely open about 5 in 2011.	5,000 sf	Multiple US Markets
Buddy's Home Furnishings	Buddy's goal is to open 20 stores in 2011.	5,000 to 10,000 sf	Multiple US Markets

**Garrick H. Brown**  
Retail Research Director  
916.329.1558  
gbrown@terranomics.com



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“Burlington Coat Factory is aggressively seeking deals on superior second-generation space. They may open as many as 20 stores in 2011.”

C

Chain	Planned Units	Footprint	Regions
Bumble & Bumble/Estee Lauder	The Bumble & Bumble hair salons will account for nearly all of Estee Lauder's US growth in 2011. The beauty niche giant is looking overseas for most of its growth. Bumble will open at least 10 new units.	2,000 sf	Multiple US Markets
Burlington Coat Factory	BCF is looking to open at least 20 stores in 2011, but this number could as much as double if the right deals come along.	70,000 sf	Multiple US Markets
buybuyBaby	BuybuyBaby saw about 20 new stores in 2010. We expect about 30 in 2011.	28,000 to 35,000 sf	Multiple US Markets
C&K Market/ Ray's Food Place/ Shop Smart	We expect as many as three to four new units over the next 18 months.	24,000 to 46,000 sf	CA, OR
Cabela's	Cabela's will open at least five stores in 2011 and likely another five in 2012. By 2013 the chain may be back up to their long-term goal of 10 units annually. The chain has lowered its footprint from 150,000 to 250,000 sf to as low as 80,000 sf in order to take advantage on cheap second-generation rents.	80,000 to 150,000 sf	Multiple US Markets
Card\$mart	Chain is looking to add units in 2011, but total number not disclosed. Believed to be less than ten.	2,000 to 4,000 sf	Multiple US Markets
Carter's/OshKosh	Carter's is looking at opening as many as 55 new stores between its two banners in 2011.	4,000 to 5,000 sf	Multiple US Markets
Cartoon Cuts	This chain is in conservative growth mode. They may or may not grow in 2011. Expansion will likely be less than five units.	1,500 sf	Eastern US
Casey's General Store	This convenience store player may grow significantly in the coming year via acquisition activity. Alimentation Couch-Tard continues to chase the chain and may eventually purchase it. In the meantime, Casey's continues to make deals of its own. We expect as many as 90 new units in 2011, though acquisition activity could significantly boost those totals.	3,700 sf	Multiple US Markets
Cavender's Boot City	This regional chain is looking to grow in 2011. Numbers have not been released, but we expect as many as five units over the next 24 months.	15,000 to 20,000 sf	AR, AZ, CO, KS, LA, MO
Charlotte Russe	Charlotte Russe's new template is at 5,500 sf, down from 7,200 sf. The chain is looking to grow in 2011 and expand its presence at outlet centers. Growth numbers have not been announced but our sources tell us to expect as many as 10 new units in the next 18 months.	5,500 sf	Multiple US Markets
Charming Charlie's	This Houston-based women's apparel and accessories chain grew by about 40 units in 2010. We expect a similar growth rate for 2011.	8,000 to 10,000 sf	Multiple US Markets
Chico's	Chico's wants to add as many as 50 more outlet stores over the next few years. But they are also opening new namesake stores and relocating units as well. We expect as many as 30 to 40 new units in the next 18 months.	2,700 sf	Multiple US Markets
Children of America	Childcare/learning chain is looking to add units in 2011, but total number not disclosed. Believed to be less than five.	8,500 to 12,600 sf	Eastern US
Children's Place, The	The Children's Place opened about 65 new locations in 2010. Look for the chain to match or beat that number in 2011. We expect 70 new units.	4,500 sf	Multiple US Markets

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Chain	Planned Units	Footprint	Regions
Christmas Tree Shops by BB&B	Likely to open at least 10 standalone stores in 2011—about the same level as 2010, but this concept by Bed, Bath & Beyond also has opened more than a few store-within-a-store locations at BB&B.	35,000 to 45,000	Multiple US Markets
Christopher & Banks	C&B is looking to open as many as 25 new stores in 2011. Most will be their outlet format.	4,500 to 5,500 sf	Multiple US Markets
Cinemark Holdings	Cinemark has at least seven new theaters planned for 2011, though this number could increase to as high as ten. Officially the chain is looking for five new units in 2011 and 2012, but our sources tell us that the right deals could increase this number.	50,000+ sf	Multiple US Markets
Citi Trends	Citi will open as many as 65 new stores in 2011.	11,000 to 16,000 sf	Multiple US Markets
Claire's	Claire's added about 13 North American stores in 2010. We expect as many as 15 stores in 2011, though foreign expansion will likely remain the company's focus.	1,200 sf	Multiple US Markets
Cleaning Concepts	This dry cleaner chain is hoping to grow by as many as five new units in the next 18 months.	2,000 to 4,000 sf	Western US
Coach	Coach opened roughly 10 retail stores and 10 outlet stores in 2010. We expect them to match that pace in 2011.	2,500 to 4,000 sf	Multiple US Markets
Coldwater Creek	Coldwater opened about 20 new stores in 2010 and we expect the same pace for 2011.	6,000 sf	Multiple US Markets
Comet Cleaners	This dry cleaning chain is looking to expand via franchisees in 2011. We expect as many as 10 new units over the next 18 to 24 months.	1,500 to 2,000 sf	Multiple US Markets
Container Store, The	They only opened about three stores in 2010, but we expect as many as five new units in 2011.	22,000 to 25,000 sf	Florida, Texas
Cool Cuts 4 Kids	We expect as many as five new units in 2011.	1,200 sf	Western US
Cost Plus	Cost Plus has been in consolidation mode for the past few years. We expect that to end in 2011, however, growth plans are currently unknown. We do expect the chain to pick up the pace of expansion soon, though we may not see increased unit counts until 2012.	15,000 to 20,000 sf	Multiple US Markets
Costco	Costco has a US target of 175 new warehouse club stores (including its Business Center clubs) over the next ten years. We expect about 20 new units over the next 12 to 15 months, though Costco is targeting a goal of 16.	126,000 sf for business centers and 145,000+ sf for warehouse clubs	Multiple US Markets
CR Jewelers Diamond Outlet	CR is a small regional chain looking to expand. We expect as many as two to three new units over the next 18 to 24 months.	1,000 to 1,500 sf	CA, FL, MD, NJ, VA
Crate & Barrel	C&B remains in conservative growth mode. The chain only opened a few stores between its namesake concept and CB2 in 2010. We expect them to remain at current growth levels for 2011.	12,500 to 25,000 sf	Multiple US Markets
Crunch Fitness	As many as 20 new locations over the next couple of years.	30,000 to 40,000 sf	Mid-Atlantic states
CVS	CVS will likely open between 250 and 275 openings in both 2011 and 2012.	12,900 to 14,600 sf	Multiple US Markets

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“Dick’s Sporting Goods in aggressively expanding. Look for at least 24 units in 2011, but this number could double by year-end.”

D

Chain	Planned Units	Footprint	Regions
Daffy’s	Daffy’s recently inked a deal for a new store in Times Square—the chain hopes to add 14 New York stores through 2015. Our sources tell us to expect as many as 10 new units in the coming year.	25,000 to 30,000 sf	Eastern US
Daniels Tire Service	Chain is looking to add units in 2011, but total number not disclosed. Believed to be less than five.	7,000 sf	Southern California
Dan’s Key Foods	Dan’s is looking to grow in the next 18 months. Our sources tell us by one to three units depending upon the economy and deals available in the marketplace.	20,000 to 40,000 sf	New York
David’s Bridal	David’s is looking at four new stores in 2011.	5,500 to 8,000 sf	Multiple US Markets
DEB Shops	This chain has been in consolidation mode until recently. We expect them to return to conservative growth in 2011, but expansion will likely be a handful of stores or less.	8,000 sf	Multiple US Markets
Destination Maternity	Destination will grow in two ways in 2011; standalone stores and its presence within Macy’s. They plan 615 store-within-stores at Macy’s over next three years. Figures for standalone stores have not been released, but our sources tell us to expect at least 15.	1,500 to 8,000 sf	Multiple US Markets
Destination XL/ Casual Male	While Casual Male may be closing under performers, the chain continues to grow its Destination XL concept. The chain will open 5 units in 2011 and as many as 15 in 2012.	10,000 to 12,000 sf	Multiple US Markets
Dick’s Sporting Goods	Dick’s has plans to add as many as 450 stores over the next five years. The chain is opportunistically seeking second-generation deals. They had planned on 20 units in 2010, but ended up with 24. They will at least reach those growth levels in 2011, but our sources tell us if the deals are right, they may double last year’s growth. Our guess is that we will see between 35 and 40 new openings in 2011.	35,000 to 45,000 sf	Multiple US Markets
Dierberg’s Markets	Chain is looking to add units in 2011, but total number not disclosed. Believed to be less than five.	65,000 to 75,000 sf	Midwest
Dirt Cheap	Dirt Cheap is planning on at least 5 new stores for 2011.	15,000 to 17,000 sf	Southern US
Discount Tire Company/ America’s Tire Company	Chain is looking to add units in 2011, but total number not disclosed. Believed to be less than 50.	8,000 sf	Multiple US Markets
Disney Store	Disney is back and it is back under the control of the Disney company, with a new format and new stores for 2011. Our sources tell us to expect around 25 new units.	3,000 to 6,000 sf	Multiple US Markets
Do It Best	This small format hardware coop chain reportedly wants to add as many as 60 units by the close of its fiscal year in June.	12,000 to 15,000 sf	Multiple US Markets
Dollar General	Dollar General plans on opening a whopping 625 new stores in 2011. Is on the record as having stated goal of as many as 12,000 new stores nationally over next decade.	9,000 sf	Multiple US Markets



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“Dollar Tree will likely add at least 275 new stores in 2011.”

Chain	Planned Units	Footprint	Regions
Dollar Tree	Dollar Tree is testing a larger concept with expanded grocery selections, Dollar Tree Market in Virginia. The chain added about 250 stores in 2010 and will likely hit at least 275 for 2011. It also is likely to add at least 30 of its smaller format Deal\$ stores.	8,000 to 12,000 sf for Dollar Tree; 23,000 sf for Dollar Tree Market; 5,000 sf for Deal\$ stores	Multiple US Markets
Drug World Pharmacy	Chain is looking to expand. We estimate as many as three new units over next 24 months.	7,000 sf	New York
DSW	DSW is looking to achieve 10 to 15 new stores annually over the next couple of years.	17,000 to 20,000 sf	Multiple US Markets
E Earth Fare	Regional organic grocery chain is expected to grow by as many as a handful of units over the next 24 months.	25,000 sf	Southern US
Edwin Watts Golf	The chain inked a deal last year with Sears to open 12 store-within-a-store sites. We are also told that Watts may be boosting traditional growth in 2011. Our sources tell us there could be as many as 5 new units in the next 24 months.	5,000 to 10,000 sf	Southern US
Eileen Fisher	We expect between 5 and 10 new over the next 18 months.	1,000 to 2,500 sf	Multiple US Markets
El Dorado Furniture	El Dorado might add another store in the coming year.	100,000 sf	Florida
El Super	Ethnic grocer El Super should see strong growth ahead. The chain will likely open five new stores in 2011, but may be acquiring as many as ten more.	45,000 sf	AZ, CA, NV
Ethan Allen	Ethan Allen is looking to grow in 2011. Expansion numbers have not been released, but our sources tell us to expect as many as ten new units over the next 18 to 24 months.	6,500 sf	Multiple US Markets; St. Louis
F Eye Care Centers of America/ Visionworks/Hour Eyes/Dr. Bizer's ValueVision/Davis Vision	This chain should open between 20 and 25 units this year between all of its banners.	2,000 to 4,000 sf	Multiple US Markets
EZ Bargain/ Beyond Linens/ AZ Sons and Furniture Mecca	These sister chains are looking to expand within their existing NJ/PA stronghold in 2011. We expect one or two new units.	3,000 to 26,000 sf	NJ, PA
Express	Express is looking to open as many as 30 stores annually over each of the next five years.	2,500 to 4,000 sf	Multiple US Markets
F Factory Mattress Direct	This chain is looking expand within its existing Texas stronghold in 2011. We expect one or two new units.	4,000 sf	Texas
Fallas Paredes/ Fallas Discount Stores/Factory 2U	This chain would like to see growth from all of their concepts in 2011. As this report went to press, growth totals had not been released, however, we expect as many as 10 new units across all concepts over the next 18 to 24 months.	15,000 to 22,000 sf	Western US
Family Christian Stores	Family Christian would like to open as many as 20 new units in 2011.	5,000 to 6,000 sf	Multiple US Markets
Family Dollar	300 Stores in 2011, including the chain's likely entry to the California market.	7,000 to 10,000 sf	Multiple US Markets

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“Family Dollar will add at least 300 stores in 2011.”

Chain	Planned Units	Footprint	Regions
Famous Footwear	Famous plans on as many as 35 new stores in 2011.	2,700 to 7,000 sf	Multiple US Markets
Famous Labels/Little Labels/20 Below	Famous is looking at as many as 25 new stores in 2011.	8,000 to 30,000 sf	Multiple US Markets
Fannie Mae Candies	Fannie Mae is hoping to add 50 franchised units for each of the next three years.	2,500 to 2,800 sf	Multiple US Markets
Fantastic Sam's	They plan to open at least 100 units in 2011— primarily through franchisees.	1,000 to 1,400 sf	Multiple US Markets
Farmers Home Furniture	This regional chain is looking to expand within existing markets over the next 18 months. Official numbers have not been released, but we expect as many as 5 units over the next 24 months.	15,000 to 20,000 sf	Southeast US
Fast Frame	This chain is looking to expand in 2011. Though official numbers have not been stated, our sources tell us to expect as many as ten units in 2011.	1,500 sf	Multiple US Markets
Finish Line, The	The Finish Line will likely add at least 20 new US stores in 2011.	2,000 to 3,000 sf	Multiple US Markets
Firestone Tire & Service Centers	Firestone is planning on opening as many as 75 new stores in both 2011 and 2012.	7,500 to 8,100 sf	Multiple US Markets
Fitness Together	Fitness Together would like to add as many as 30 units in 2011.	10,000 sf	Midwest
Five & Dime General Stores	Five & Dime is looking at opening a minimum of five new stores in 2011, though our sources tell us this number could increase if the deal is right.	2,500 to 4,000 sf	Northern CA, NY, SC
Five Below	Five Below recently inked a deal to open as many as 60 stores in the Chicago market alone (over the next five years). They also continue to look for sites in multiple markets. We expect as many as 50 new units in 2011, if not more.	2,000 to 4,000 sf	Multiple US Markets
Flash Foods	Convenience store/gas station chain is looking to add units in 2011, but total number not disclosed. Believed to be less than 10.	3,500 to 4,500 sf	Southeast US
Flip Flop Shops	This Florida-based chain currently operates about 25 stores but has plans to go national and wants to hit the 236-unit mark by 2013. They would like to open as many as 65 units in 2011.	1,000 sf	Multiple US Markets
Food City	This regional chain will open as many as three new stores in 2011.	40,000 to 50,000 sf	Appalachia
FoodsCo/Food 4 Less	This chain will open at least two new stores annually over the next two years.	70,000 sf	Chicago, Las Vegas, California
Foot Locker	Foot Locker will likely open at least 20 new US units in 2011.	2,000 to 3,000 sf	Multiple US Markets
Forever 21	Forever 21 now has a gross opening target number of between 70 and 80 units worldwide annually. This is the most opportunistic of all retailers when it comes to real estate, willing and able to bend its footprint to the deal. That being said, we expect at least 50 new US units in the coming year in all shapes and sizes.	40,000 to 200,000 sf	Multiple US Markets
Fossil	Fossil added 45 stores in 2010, but most were outside the US. The chain plans on a similar expansion pace this year, but may boost US growth. Our sources tell us to expect at least 10 new US stores, possibly more, in the coming year.	1,500 to 6,000 sf	Multiple US Markets

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**Garrick H. Brown**  
Retail Research Director  
916.329.1558  
gbrown@terrnomics.com



Chain	Planned Units	Footprint	Regions
Fred Meyer	Our sources tell us to expect Fred to be on the move in 2011, primarily looking to buy sites, and that California expansion may be in the works. Still, no hard numbers have been shared. We expect there could be as many as four new stores in 2011.	66,000 to 175,000 sf	Western US
Fred's	Fred's growth plans have not been announced, but our sources tell us that the chain will likely add a minimum of between 20 units in 2011.	14,000 to 18,000 sf	Southern US
Fresh & Easy	As many as 60 Stores to open in Northern California and Nevada in 2011. Midwest rumored to be focus of next expansion blitz—may begin before year-end. All told, the chain wants to grow by about 230 units over the next two years.	14,000 sf	Northern California, Nevada, Midwest
Fresh Market	Regional organic grocery chain is expected to grow in the range of 10 units annually over the next couple of years. They would like to eventually take their roughly 100-unit count as high as 500.	18,000 to 21,000 sf	Southern US
Gamer Doc	We expect this franchisee driven video game store chain to add as many as 25 units in 2011.	2,000 sf	Multiple US Markets
Gamestop	Gamestop opened about 250 new stores in 2010. We expect 2011 openings to hit at least 275.	2,000 sf	Multiple US Markets
Gap, The	The Gap's new active wear concept, Athleta, was recently launched in Northern California. Though The Gap has slowed growth of its namesake stores, we expect considerable growth from this new concept in 2011. Numbers have not been released but we are told that as many as 50 units could be open over the next 24 months.	2,000 to 4,000 sf	Multiple US Markets
Gateway Newsstands	Gateway wants to open 20 new units annually within existing markets over the next few years.	150 to 1,000 sf	Multiple US Markets
Gelson's Markets	Upscale regional supermarket chain is looking to grow in 2011. We expect one or two new units at most.	30,000 to 35,000 sf	Southern California
Giant Foods	Giant has plans for at least two new stores in Pennsylvania in former Genuardi's locations, but we are told that this number could go up.	40,000 to 60,000 sf	Eastern US
Gilroy's Hardware	This regional chain is looking to grow in 2011. Expansion numbers have not been released, but our sources tell us to expect as many as four new units over the next 18 to 24 months.	8,000 to 10,000 sf	Southern US
Glamour Shots	This photography chain is looking to grow in 2011, primarily via franchisees. We expect at least four to seven new units.	800 to 1,200 sf	Multiple US Markets
GNC	GNC wants to add at least another 1,000 US and Canadian stores over the next few years. We expect as many as 40 new units in 2011.	1,500 to 2,500 sf	Multiple US Markets
Golf Galaxy	Will likely be adding five new stores per year in both 2011 and 2012.	16,500 sf	Multiple US Markets
Golfsmith	Golfsmith is expected to add seven new units this year and next. The chain is also experimenting with a new concept; Golf Playground, which could add as many as 14 new stores through 2012.	20,000 to 28,000 sf	Multiple US Markets
Goodwill	Goodwill has not released growth goals, but the chain is on an expansion roll lately. The climate is perfect for thrift stores. We expect a minimum of 30 new units in 2011.	Various footprints	Multiple US Markets

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“Grocery Outlet will add at least 14 stores in 2011, but our sources tell us this number will likely increase.”

H

Chain	Planned Units	Footprint	Regions
Gordman's Department Store	Gordman's will be opening as many as 8 new units in 2011, including two new Minneapolis stores.	50,000 sf	Midwest
Grease Monkey	Chain is looking to add units in 2011, but total number not disclosed. Believed to be less than 10.	2,300 sf	Multiple US Markets
Greenway Stores	Convenience store chain is looking to add units in 2011, but total number not disclosed. Believed to be less than five.	3,000 sf	Georgia
Grocery Outlet	At least 14 new stores throughout the Western US in 2011—this number may increase. We expect a minimum of 20 new stores in 2011.	12,000 to 20,000 sf	Western US
Gymboree/Crazy 8/Janie and Jack	Gymboree opened about 120 new stores under its three divisions in 2010. We expect them to match or beat that total in 2011. Our estimate is 130 new units.	2,000 to 3,000 sf	Multiple US Markets
Halloween Express	This seasonal space user bumped from about 165 units in 2009 to 200 units in 2010. We expect they may be in the market for as many as 225 pop-ups for 2011.	9,000 to 12,000 sf	Multiple US Markets
Hancock Fabrics	Hancock has been in consolidation mode the last few years. We expect them to eventually return to growth, but likely not this year.	25,000 sf	Multiple US Markets
Hannaford Supermarkets	May be adding as many as four stores through midyear 2012.	40,000 to 60,000 sf	Eastern US
H-E-B Groceries/ Joe V's Smart Shop	H-E-B continues to grow in its home territory of the Lone Star State. Growth numbers have not been released, but we see as many as five to ten new units between H-E-B and its discount banner (Joe V's) in the coming 18 months.	30,000 to 60,000 sf	Texas
H&M	H&M has been opening about 250 stores annually worldwide for the last few years. This growth pace should continue into 2011. As this went to press a new downtown Baltimore store was in the works. Ultimately we expect at least 20 new units in the US in the months ahead.	15,000 to 40,000 sf	Multiple US Markets
Hermes	Hermes has plans for as many as three new US Stores in 2011.	2,000 sf	Atlanta, New York
HHGregg	HHGregg has been the major user of former Circuit City space on the East Coast, locking in low lease rates on second generation space in order to secure growth in these markets. The chain opened about 45 new stores in 2010 and we expect it to surpass those numbers in 2011... possibly hitting the 60 unit count	30,000 to 40,000 sf	East of the Mississippi
Hibbett Sports	Hibbett could see as many as 50 new stores in 2011. The chain is aggressively pursuing deals on second-generation video store sites.	5,000 sf	Midwest, Southeast, Southwest
Hobby Lobby	Hobby Lobby is looking at adding as many as 30 new stores in 2011.	55,000 sf	Northeast US, West Coast
Home & Garden Showplace	This chain is looking to match 2010's opening levels of 10 stores.	5,000 to 10,000 sf	West of the Rockies
Home Depot	Ten new US Stores planned for 2011.	95,000 to 120,000 sf	Multiple US Markets
Hot Topic	This chain will likely open about 10 new units in 2011.	1,600 to 1,800 sf	Multiple US Markets
Huntington Learning Centers	Huntington is looking to expand in the coming year. We expect them to add at least 30 new units.	1,800 to 2,500 sf	Multiple US Markets

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“Kohl’s is looking to add as many as 40 new department stores throughout the US in 2011.”

Chain	Planned Units	Footprint	Regions
IKEA	One new store in Denver on tap for 2011.	150,000+ sf	Denver
It’s Fashion Metro	This chain could add as many as 30 new stores in 2011.	3,000 to 4,000 sf	Multiple US Markets
Ivan Smith Furniture	Chain wants to expand over next 18 months. Growth goals have not been made public, but our sources tell us to expect as many as three new units.	20,000 to 40,000 sf	AR, LA, TX
J. Crew	Chain is looking to expand over the next 18 months, however, as this report went to press J Crew was in the process of potentially being acquired... so actual growth plans are hazy. We suspect at least 10 new units in 2011.	5,500 sf	Multiple US Markets
J. Stephens	We expect this chain to add as many as three units in the next 18 months.	1,400 to 2,200 sf	AZ, CA
Jared—The Galleria of Jewelry/Sterling Jewelers	Chain is looking to add units in 2011, but total number not disclosed. Believed to be less than 15.	6,000 sf	Multiple US Markets
JCPenney	JCPenney will open at least three new department stores in 2011, even while closing down its outlet division. The chain would eventually like to see at least 30 openings annually, but is only willing to take second-generation space at premium centers. The chain would like to see a minimum of 25 new department stores annually by 2103/2014.	90,000 sf+	CA, MD, TX
JCPenney Big & Tall Concept: The Foundry Big & Tall Supply Company	As many as 300 new standalone stores through 2013.	6,000 sf	Multiple US Markets
Jensen Jewelers	This regional chain out of Idaho is looking to grow in 2011. We expect at least one to two new units over the next 18 months.	1,400 to 1,600 sf	Northwest
Jewel-Osco/SUPERVALU	Jewel is looking to remodel as many as 20 locations in 2011. The chain will likely see new openings below the level of five units.	60,000 to 75,000 sf	Midwest
Jimmy Jazz	Jimmy Jazz is hoping to open between 25 and 30 new units in 2011.	2,500 to 4,000 sf	Multiple US Markets
Jo-Ann Stores	Jo-Ann is looking at adding as many as 50 new stores in 2011.	10,000 to 25,000 sf	Multiple US Markets
Joe’s Jeans	This chain opened 13 stores in 2010. We expect at least 15 in 2011.	1,500 sf	Multiple US Markets
Jos A Banks	Up to 175 stores nationally over the next five years.	3,500 to 4,500 sf	Multiple US Markets
Justin Boot Outlet/Tony Loma Outlet	We expect this chain to add as many as two units in the next 18 months.	5,000 to 8,500 sf	MO, TX
Kay Jewelers/Sterling Jewelers	Chain is looking to add units in 2011, but total number not disclosed. Believed to be less than 15.	1,600 to 1,800 sf	Multiple US Markets
Kirkland’s	Kirkland’s is expected to open at least 35 new stores in 2011.	7,000 to 10,000 sf	Multiple US Markets
Kroger/Kroger Marketplace/Dillion’s/Fry’s/Smith’s	Much of Kroger’s growth this year will be via its Marketplace concept, which we expect will be adding as many as 20 units in 2011. However, we also expect the chain to be active in closing some under performers under their namesake banner.	Kroger marketplace uses about 117,000 sf	Central US; Southern US
Kohl’s	Kohl’s is planning on between 30 and 40 new stores in 2011.	60,000 to 90,000 sf	Multiple US Markets
Kumon Math & Reading Centers	Kumon could add as many as 150 new units in 2011.	1,200 sf	Multiple US Markets

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Chain	Planned Units	Footprint	Regions
LA Fitness	LA Fitness continues to look for locations throughout California and other markets. Growth projections have not been released, though we know of at least four units in the pipeline. This number will almost certainly go up. Our sources tell us there may be 10 new clubs over the next 18 to 24 months.	20,000 to 40,000 sf	Multiple US Markets
Launderland/ Lucy's Laundromat	This chain is looking to expand in 2011, though growth targets have not been announced. We expect as many as 10 new units in 2011.	1,800 to 4,000 sf	Western US
La-Z-Boy	La-Z-Boy is looking to open at least 12 new stores in the next 18 months.	15,000 sf	Multiple US Markets
Lola by BCBG Max Azria	New concept that could add as many as 20 units over next 24 months.	1,500 to 3,000 sf	Multiple US Markets
LensCrafters	LensCrafters will likely open at least 20 units across all of its brands in 2011, though actual numbers have not yet been released.	2,000 to 4,000 sf	Multiple US Markets
Les Schwab Tire Centers	Les Schwab is reducing its footprint from 15,000 sf to about 11,000 sf this year. The chain also is looking to open about 10 new stores in 2011.	11,000 to 12,000 sf	Western US
Lifestyle Family Fitness	Health club chain is looking to add units in 2011, but total number not disclosed. Believed to be less than 8.	32,000 to 48,000 sf	Midwest
Linens & More for Less	This chain is looking to open as many as 15 units in 2011.	20,000 to 45,000 sf	Multiple US Markets
Liz Claiborne/ Juicy Couture/ kate spade/ Lucky Brand Jeans	Liz Claiborne is expected to open between 25 and 30 new units across its multiple brands in 2011.	1,200 to 1,800 sf (kate spade) 2,000 sf (Juicy Couture) 2,000 to 4,000 sf (all others)	Multiple US Markets
L'Occitane	This French beauty niche retailer recently (May 2010) raised funds through an IPO and is reportedly looking to boost US expansion in 2011. Numbers have not been released but our sources tell us to expect at least 10 new units over the next 18 months.	5,000 to 10,000 sf	Boston, Chicago, Denver, Los Angeles, New York, San Diego & Washington DC
Lord & Taylor	Adding first new department store in 10 years—2012 in Yonkers.	100,000± sf	New York City
Louie's Tux Shop	Louie's may be adding as many as three new stores over the next couple of years.	1,000 to 1,600 sf	Midwest
Lowe's	Lowe's is expected to add as many as 45 new stores internationally in 2011. Canada and the US will account for most of this growth.	94,000 to 103,000 sf	North America
Lululemon	As many as 30 new North American stores in 2011.	2,000 to 4,000 sf	Multiple US Markets and Canada

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Chain	Planned Units	Footprint	Regions
Magruders	Regional grocer looking to expand in existing markets in next 18 months. Our sources tell us growth will be anywhere from one to three units.	25,000 to 32,000 sf	Greater Washington DC area
Mandee	Chain is looking to expand over the next 18 months—our sources say likely by a minimum of five units.	5,000 to 8,500 sf	Eastern US
Mango	This Spanish fashion retailer has big expansion plans for the US on tap, but mostly in the form of stores-within-a-store. The chain will be adding 600 shops within existing JCPenney stores through next year.	2,000 to 5,000 sf	Multiple US Markets
Marburn Curtain Warehouse	Regional chain Marburn is looking for opportunities to expand within its core areas of PA, NJ and NY. We expect one to two new units in the coming year.	7,500 sf	NJ, NY, PA
Max Muscle	Max Muscle wants to add as many as 24 new stores in 2011.	2,000 sf	Multiple US Markets
Max Wellness	This fitness shop is expected to grow by as many as 20 new stores in 2011.	5,000 sf	Mid-Atlantic, Midwest
Maxx Value Foods/Save Mart Supermarkets	New discount concept from Save Mart expected to add as many as five new units in 2011.	25,000 to 40,000 sf	California
Meijer	Meijer is exploring a new smaller format in the Chicago market as low as 105,000 sf, but is also on the hunt for prime second-generation spaces. Our sources tell us that we could see as many as 5 new units in 2011.	105,000 sf	Midwest
Menards	We know of two planned new Menards so far for 2011; one in Yankton, SD and one in Eden Prairie, MN. We would not be surprised to see the Midwest-based home improvement retailer add another store or two into the mix before the end of the year.	225,000 sf	Midwest
Men's Wearhouse	Though this chain has not been in growth mode as of late, we expect this to change in 2011, whether through the namesake concept of K&G Fashion Superstores. We expect at least ten to 115 new units.	15,000 to 25,000 sf	Multiple US Markets
Michael's	Michael's will add as many as 35 new arts and crafts stores in 2011.	14,000 to 24,000 sf	Multiple US Markets
Micro Center	Electronics chain is looking to add units in 2011, but total number not disclosed. Believed to be less than five.	28,000 to 32,000 sf	New York
Microsoft	We estimate 15 to 20 new stores in 2011.	2,000 to 7,000 sf	Multiple US Markets
Mind Body Sole by Famous Footwear	New concept that added five units in late 2010. We expect 2011 growth to be in the ten to 15 unit range.	2,000 to 4,000 sf	Multiple US Markets
Mitchell Gold + Bob Williams	This upscale furniture chain is looking to grow in 2011. Our sources tell us to expect at least two new units, possibly double that.	7,500 to 12,500 sf	Multiple US Markets



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“Nordstrom Rack will open at least 19 new stores in 2011, but this number will likely increase.”

N

O

Chain	Planned Units	Footprint	Regions
National Vision/ America's Best Contacts & Eyeglasses/ Eyeglass World	This optometry chain is hoping to open 50 units in 2011.	2,000 to 3,000 sf	Multiple US Markets
New York & Co	They opened about 25 outlet stores in 2010. It remains to be seen if they will match this pace in 2011. Still, we expect a minimum of at least 10 new units, if not more.	5,500 sf	Multiple US Markets
Newflower Farmer's Market	We expect 5 to 10 new units	11,000 to 30,000 sf	Multiple US Markets
Neiman Marcus Last Call	Growth numbers have not been released but we expect a minimum of five new outlet stores from Neiman.	11,000 to 30,000 sf	Multiple US Markets
New York Sports Clubs	This health club chain is looking to grow in 2011. Our sources tell us to expect at least three new locations, possibly more.	15,000 to 30,000 sf	Northeast US
Nike	Up to 300 US locations over the next five years. 2011 store counts are unclear, though we expect as many as 60, including both Nike Factory Outlets and Niketown.	4,000 to 6,000 sf	Multiple US Markets
Nordstrom Rack	Nordstrom has plans for about 19 new Rack stores through 2011, but this number could increase.	34,000 to 42,000 sf	Multiple US Markets
Northgate Gonzalez Market	This regional ethnic grocer will see strong growth ahead. The chain is likely to see between five and ten new stores in Southern California (half may come through acquisition) and is gearing up to expand to California's Central Valley and San Jose soon.	15,000 to 45,000 sf	California
Ocean State Job Lot	We expect as many as 10 new units over the next 24 months.	25,000 to 45,000 sf	New England
Off Broadway Shoes	Growth projections have not been released, but we expect a minimum of five new units over the next 18 months.	25,000 to 35,000 sf	Multiple US Markets
Office Depot	Office Depot has not released numbers, but the 1,150 unit chain has a long-term goal of reaching 2,000 units. Growth is likely back on tap for this year, but we expect it will be cautious growth. Our sources tell us to expect no more than 20 new units in 2011.	15,000 to 24,000 sf	Multiple US Markets
OfficeMax	OfficeMax will see minimal growth in 2011. The chain only opened two stores in 2010—both in Mexico. It has 600 leases in the US expiring through 2014 and will likely renew most as they do not want to lose further market share through closures. But our sources tell us new openings in the US will likely be fewer than five in 2011.	18,000 sf	Multiple US Markets
Ollie's Bargain Outlets	Ollie's is hoping to open as many as 20 new stores in 2011.	27,000 to 42,000 sf	Eastern US
Olympia Sports	Regional small format sporting goods player Olympia added about 13 stores in 2010 and our sources tell us they are looking to match this number in 2011.	3,600 to 5,000 sf	Mid-Atlantic, New England
One Stop Food Market/Tinee Giant	Convenience store chain is looking to add units in 2011, but total number not disclosed. Believed to be less than four.	3,000 sf	Virginia
O'Reilly Auto Parts	O'Reilly will add 170 new stores in 2011.	6,800 to 7,300 sf	Multiple US Markets

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P

Chain	Planned Units	Footprint	Regions
OSH	OSH only opened one new store in 2010, but our sources tell us this number should grow in 2011. We expect as many as three to five new units in the coming year—all in OSH's home base of California.	35,000 to 45,000 sf	California
Pantry, The	The Pantry only added one new store in 2010 and remains conservative in 2011 growth plans. Still, they may add units via acquisition. And they may grow through the Kangaroo Express banner. We expect minimal growth in 2011, but still would not be surprised to see at least ten new units.	2,600 to 3,200 sf	Southern US
Papyrus/American Greetings/Carlton Cards	Sister chains are looking to add units in 2011, but total number not disclosed. Believed to be in the 6 to 10 range.	1,500 to 4,000 sf	Multiple US Markets
Payless ShoeSource	Payless is planning on as many as 60 new stores in the coming year, though it also has plans to close about 80 underperformers.	2,700 to 7,000 sf	Multiple US Markets
P.C. Richard	This regional electronics chain has been active lately gobbling up second generation space left behind by the BK Bernie's TV & Appliance chain. They may open as many as 10 units in 2011.	30,000 to 35,000 sf	Eastern US
Pep Boys	Manny, Moe and Jack are hoping to open as many as 55 new stores in 2011. This number includes both their smaller format tire centers and their larger superstores.	4,000 to 6,000 sf (tire centers) 14,000 to 20,000 sf	Multiple US Markets
Performance Bicycle	Performance wants to add between five and nine units in 2011.	6,500 to 8,000 sf	Multiple US Markets
Pet Food Express	This recent startup is looking at a minimum of two new locations in 2011, but these numbers may increase quickly.	7,000 to 10,000 sf	Northern California
PetLand	PetLand is planning on 15 new stores in 2011.	4,000 to 5,500 sf	Central US
PetSense	They are hoping to open as many as 30 stores in 2011.	5,200 to 7,200 sf	Southeast US
Pet Supermarket	Pet Supermarket is hoping to open 24 new stores in 2011.	8,000 to 10,000 sf	Midwest, Southern US
Pet Supplies Plus	Pet Supplies Plus is looking to open 15 new stores in 2011.	8,000 to 10,000 sf	Central US
Petco	Petco added just over 40 new stores in 2010. We expect those numbers to creep back up in 2011. While we doubt that they will reach the 50-unit mark that was recorded in 2009, we think 45 units will be their sweet spot.	13,000 to 14,000 sf	Multiple US Markets
PetSmart	PetSmart has lowered its typical footprint from 20,000 sf to about 13,000 sf. The chain has also lowered its growth rate from 10% just a couple of years ago to the 3% to 4% range. Still, with roughly 1,165 stores, a 3% growth rate means at least 35 new units in 2011.	13,000 sf	Multiple US Markets
Pier 1 Imports	Plans call for 100 new stores in existing markets over the next three years. That being said, the ramp up will be slow. We only know of five units for sure in 2011, though this number may go up if recovery holds.	8,000 to 10,000 sf	Multiple US Markets

“Payless ShoeSource may be opening as many as 60 new stores in 2011”



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“Red Wing Shoes is looking to aggressively expand with as many as 125 new stores planned for the next five years.”

R

Chain	Planned Units	Footprint	Regions
Piggly Wiggly	Piggly Wiggly is currently looking for sites in South Carolina, however, we also expect the chain to be closing a few under-performers throughout the South this year.	25,000 to 45,000 sf	South Carolina
Planet Fitness	As many as five NYC locations alone over the next 24 months. Nationally, the chain is hoping for 75 new units.	11,000 to 12,000 sf	Multiple US Markets; Midwest
Play N Trade	Play N Trade opened about 30 stores in 2010. This year's target is 40 units.	2,200 sf	Multiple US Markets
Pretty Girl	We expect as many as five new units over the next 24 months.	3,500 to 15,000 sf	Eastern US
Publix/Publix Sabor	Growth plans have not been announced but we expect growth from both Publix and its Hispanic-themed concept Publix Sabor. The chain is well funded and has a stated goal of as many as 35 new stores annually.	40,000 sf for Publix Sabor	Southeast US
Puget Consumers Co-Op	This regional grocer is looking to add at least one more unit in the next year.	20,000 to 25,000 sf	Seattle
Pump & Pantry	Convenience store/gas station chain is looking to add units in 2011, but total number not disclosed. Believed to be less than five.	2,000 to 5,000 sf	New England
Putting Edge	Indoor miniature golf chain looking to expand in 2011. Likely to add at least one or two new stores.	7,000 sf	Multiple US Markets
RaceTrac	This regional convenience store player could be looking at a minimum of 100 new c-store/gas stations in the next year.	4,000 sf	Southern US
Rack Room	Rack Room has plans to open as many as 15 new shoe stores this year.	6,000 sf	Multiple US Markets
Radio Shack	The Shack has been in slow growth mode for its traditional stores over the past few years, adding 25 or fewer units the past two. We expect growth to pick up slightly in 2011, but likely still fall in the 25 to 40 unit range.	2,500 sf	Multiple US Markets
Rainbow Shops/ Rainbow Kids/ Rainbow Plus/5 7 9 Stores	Rainbow is looking to open as many as 60 stores in 2011 across all of its concepts.	1,800 to 3,000 sf (5 7 9 hops); 6,000 to 20,000 sf (all other Rainbow concepts)	Multiple US Markets
Red Wing Shoes	Red Wing has plans for 125 new stores over the next five years. We expect at least 30 of them to come online in 2011.	2,000 to 4,000 sf	Northeast US
Regal Cinemas	Regal wants to add at least seven new theaters in 2011, and possibly more in 2012. However, the chain is also continuing to close underperformers.	50,000 to 70,000 sf	Multiple US Markets
REI	REI will be opening a new SoHo store in 2011 and is also seeking other growth opportunities across multiple markets. Growth numbers have not been released, but our sources tell us there could be as many as five new stores over the next 18 to 24 months.	20,000 to 30,000 sf	Multiple US Markets
Relax the Back	Chain has plans for 12 new stores over the next 18 months.	2,300 to 2,700 sf	Multiple US Markets
RetroFitness	Retro wants to add 300 clubs through 2013.	12,000 to 14,000 sf	Midwest
Ridout Lumber Company	Chain wants to open at least two new stores over next 18 months.	9,500 sf	AR, MO, MS, TN

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“Sally Beauty Supply will add as many as 165 stores in 2011.”

S

Chain	Planned Units	Footprint	Regions
Rite Aid	Rite Aid only opened three stores in 2010 and is expected to increase that number in the coming year. The only question is by how many? The chain's debt issues and stock value may ultimately determine this.	15,000 to 17,000 sf	Multiple US Markets
Rogers & Holland's Jewelers	Chain is looking to add units in 2011, but total number not disclosed. Believed to be less than five.	1,500 sf	Central US
Ross Dress for Less/dd's Discount Stores	Ross' long-term goals are to have at least 500 namesake stores and 500 dd's Discount stores in operation. The chain opened about 35 Ross locations and 15 dd's stores in 2010. We expect those numbers to be surpassed in 2011. Between the two concepts, we expect at least 60 units for 2011.	22,000 to 30,000 sf	Multiple US Markets
Roundy's/ Mariano's Fresh Market/Metro Market/Pick n' Save/Copps	Roundy's is expanding their Mariano's Fresh Market concept in the Chicagoland region. They are also growing in Wisconsin. Look for at least five new units in 2011.	25,000 to 40,000 sf	Midwest
RP Lumber	This regional chain is looking to grow in 2011. Expansion numbers have not been released, but our sources tell us to expect as many as four new units over the next 18 to 24 months.	Lumber yards need roughly three acres of land.	Midwest
Rue21	Rue wants to open as many as 100 stores in 2011.	2,000 to 4,000 sf	Multiple US Markets
Safeway	Safeway has at least nine new stores in the chute for 2011; seven will be in the San Francisco Bay area while two will be in the greater Los Angeles region.	50,000 to 70,000 sf	CA. OR
Saks Off Fifth	Saks Off Fifth currently has plans for about five new stores in 2011, though we would not be surprised if this number increased by a unit or two over the next few months.	28,000 sf	Multiple US Markets
Sally Beauty Supply	Sally typically adds a minimum of 150 new units annually via franchise growth. 2010 closed with about 165 new stores. We expect at least that number in 2011, if not more.	1,200 to 1,800 sf	Multiple US Markets
Salvation Army	Thrift stores are in growth mode thanks to the economy and Salvation Army is on the move, looking in many markets for new space in a wide variety of sizes. Growth targets have not been released, but we expect as many as 50 new units over the next 18 months.	3,000 to 24,000 sf	Multiple US Markets
Sam's Club	Sam's is looking at adding as many as 12 new stores in 2011.	120,000+ sf	Multiple US Markets
Save-A-Lot/ SUPERVALU	This new discount concept from SUPERVALU will see the lion's share of the chain's growth as it trims back on its other mid-priced banners and boosts this smaller discount format. We expect as many as 100 new Save-A-Lot stores in the coming year from SUPERVALU—many of which will be co-branded with Rite Aid and most will be in the Midwest. The chain will also grow its Hispanic themed concept, El Ahorro Save-A-Lot in Texas.	Save-A-Lots are typically in the 15,000 to 20,000 sf range, with some variances	Multiple US Markets
Savers/Value Village	Savers and Value Village opened about 20 new stores in 2010. Though numbers have not been released, we expect them to come close to that number in 2011.	25,000 to 40,000 sf	Pacific Northwest

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**Garrick H. Brown**  
 Retail Research Director  
 916.329.1558  
[gbrown@terrnomics.com](mailto:gbrown@terrnomics.com)



**CHAINLINKS**  
 RETAIL ADVISORS

Chain	Planned Units	Footprint	Regions
Schnuck's	Has at least two new stores on tap for 2011, though this number may double if recovery picks up steam.	63,000 sf	Midwest
Sedano's Supermarkets	Sedano's will likely open a minimum of three stores in 2011, but we see this number probably doubling before the year is over.	25,000 to 45,000 sf	Florida
See's Candies	See's is looking to open as many as ten new stores in 2011.	1,000 to 1,400 sf	Multiple US Markets
Sharpe Department Stores	Regional small format department store is looking to add new locations in existing markets over next 18 months. Our sources tell us to expect a couple of new units.	5,000 to 10,000 sf	AR, LA, OK
Sherwin-Williams	Paint store chain looking to grow over next 18 months. Growth totals have not been shared. We expect as many as 100 units.	4,000 to 4,500 sf	Multiple US Markets
Shoe Carnival	Shoe Carnival will be closing six under performers in 2011, but opening 20 new locations. The chain plans on as many as 30 new units in 2012.	8,000 to 15,000 sf	Multiple US Markets
Shoe Sensation	We expect this chain to add as many as four units in the next 18 months.	4,800 to 6,500 sf	Eastern US
Shoe Show/Shoe Dept./Encore	Shoe Show is planning on at least ten new stores in 2011. The chain's midsize concept, Shoe Dept., is slated for as many as 15 new stores. Meanwhile, Shoe Show's newest concept, Encore, is expected to open as many as seven units in 2011.	3,200 to 4,000 sf (Shoe Show) 4,500 to 10,000 sf (Shoe Dept.) 12,000 to 15,000 sf (Encore)	Multiple US Markets
ShopKo/Hometown	Shopko is looking to grow in 2011 but have not released target numbers. Our sources tell us to expect no more than five. The chain recently opened two of its new smaller concept Hometown stores. We expect that this concept will see the lion's share of growth in 2011.	35,000 sf for Hometown and 80,000 sf for ShopKo	Western US
ShopRite Supermarkets/LML Supermarkets	ShopRite and sister-brand LML are looking to grow in 2011 but have not released target numbers. Our sources tell us to expect at least two new ShopRite units and possibly the same from LML.	60,000 to 70,000 sf	CT, NJ, NY, PA
Sixth Avenue Electronics	This regional player is looking to add as many as three to five units over the next 18 months.	25,000 to 35,000 sf	Eastern Seaboard
Smart & Final/SmartCo Foods/Smart & Final Extra	After pulling out of the Denver market in 2010, our sources tell us that Smart & Final is ready to pursue growth again in 2011. However, growth targets have not been released. We know of one SmartCo planned in Orange County, but suspect that we will likely see as many as five new units (if not more) in 2011.	20,000 to 40,000 sf	Western US
Snap Fitness	Snap Fitness wants to add as many as 200 new stores in 2011. At least 130 of these should be in the US. The chain likes former Movie Gallery spaces in particular.	2,500 to 3,500 sf	Multiple US Markets
Spartan Stores/D&W Fresh Markets/Family Fare Supermarkets/Glen's Market's/Felpausch Food Markets	This regional player has mostly grown via acquisition in recent years. That being said, they have plans for at least two new stores by March. We expect as many as 5 new units throughout all concepts in 2011, barring any other low level acquisitions	40,000 to 50,000 sf	Midwest

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“Target has 21 new US stores currently in development for 2011, but this number could increase.”

Chain	Planned Units	Footprint	Regions
Speedway SuperAmerica	This C-store/gas station concept has seen flat growth since 2004, but could finally return to minimal growth in 2011. Numbers have not been released, but we would not be surprised to see at least ten new units in the coming year.	2,400 to 3,600 sf	Midwest
Snip-Its	This franchise driven haircut chain wants to open as many as 30 units in 2011.	800 to 2,000 sf	Multiple US Markets
Spencer's Gifts	Spencer's would like to add as many as 20 units in 2011.	1,800 to 2,100 sf	Multiple US Markets; Canada
Sports Authority	Our sources tell us that Sports Authority will be ramping up their superstore growth in the next two years. Expansion goals have not been released, but we expect a minimum of 25 new stores, but this number could easily double.	40,000 for typical store. SA Elite stores use just 12,000 to 15,000 sf	Multiple US Markets
Sport Chalet	Unlikely to add any new stores in 2011.	42,000 sf	Western US
Sport Clips Haircuts	Sport Clips wants to open 100 new units in 2011.	1,000 to 1,400 sf	Eastern US
Sprouts Farmers Market	Sprouts had been aggressively growing and we had expected them to add as many as 15 new units over the next 18 months. However, they were purchased by Apollo Management in mid-February, a private equity firm that will combine their brand with Henry's Farmer's Market (a concept they already owned). We think they will boost expansion even further once the dust settles.	24,000 to 30,000 sf	Western US
Staples	Staples recently upped 2011 growth plans from 40 to 50 stores. This number may increase yet again.	4,000 sf for small format stores and 18,000 sf for typical format	Multiple US Markets
Stater Brothers	Regional grocer Stater Brothers has at least one new store planned for 2011, but our sources tell us this number could increase to three or four over the next 18 to 24 months.	40,000 to 60,000 sf	Southern California
Stein Mart	While Stein Mart will be closing a few underperformers this year, our sources tell us that they are also returning to cautious expansion. Numbers have not been released, but we expect them to likely add as many as 5 units in the coming months.	30,000 sf	Multiple US Markets
STS Tire & Auto Centers	STS has not released growth plans for 2011, though the chain did open two stores in the latter half of 2010. We expect expansion in 2011 to likely translate into two to three new units.	5,600 sf	Mid-Atlantic States
Sunrise Cinemas	Looking to expand in 2011. Likely to add at least one new theater.	50,000+ sf	Southeast US
Super Mercado/ Buy For Les	Super Mercado and sister chain Buy For Less are looking to grow in 2011—likely by one or two units.	30,000 to 62,000 sf	Oklahoma
Supercuts	Supercuts typically adds a minimum of a few hundred new units annually via new franchisees. We expect them to add at least 100 in 2011, if not more.	800 to 1,200 sf	Multiple US Markets
Sur La Table	Sur La Table will add as many as 15 new stores in 2011.	5,000 sf	Multiple US Markets
Swoozie's	Swoozie's will likely add around five units this year.	3,500 to 4,000 sf	Multiple US Markets

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“Tractor Supply has plans for as many as 75 new stores in 2011.”

T

Chain	Planned Units	Footprint	Regions
T-Mobile	T-Mobile has not released growth plans. Much of their expansion has been franchise driven. However, they are on record as having stated they want to open hundreds of stores in 2011. We expect at least 150 new units in 2011.	1,500 to 2,500 sf	Multiple US Markets
Target	Target has been on a major push to land prime urban retail spots and has recently done deals in Manhattan, Chicago, San Francisco, Seattle and Los Angeles. The chain also is about to make major inroads into Canada thanks to its purchase of the 220-unit Zeller's chain. In the US, Target has announced plans for 21 new stores in 2011.	Typical Target superstore comes in at 128,000, 135,000 or 185,000 sf; exploring as low as 50,000 sf	Multiple US Markets
Tilly's	This skate store chain is looking to open as many as 15 new stores in 2011.	4,000 to 6,000 sf	Multiple US Markets
Tiremax	This regional player is looking to open three new stores in the Denver market in 2011.	6,000 sf	Denver
TJ Maxx/ Marshall's HomeGoods (TJX Companies)	Look for growth for TJX to come from TJMaxx and Marshalls in 2011. The chain is shutting down their AJ Wright concept. 91 locations are being converted into TJMaxx, Marshall's or HomeGoods stores while another 71 are simply going dark. TJMaxx and Marshall's combined for a total of 53 new stores in 2010. Numbers have not been released, but we expect at least another 40 additional units in 2011, not counting the AJ Wright conversions. Meanwhile, HomeGoods will likely surpass last year's ten new stores. We expect about 15.	30,000 to 32,000 sf (TJMaxx & Marshall's); 25,000 to 50,000 sf (HomeGoods)	Multiple US Markets
Totes/Sunglass World/Sunglass Station	Totes is looking to expand in 2011, but growth totals have not been released. We expect at least five new units over the next 18 to 24 months.	500 to 2,500 sf	Multiple US Markets
Town Faire Tire	They expect to open five new stores in 2011.	7,000 sf	New England
Toys R Us	Toys R Us opened 600 pop-up stores during the 2010 Holiday Shopping Season, up from 60 in 2009. Many of these were in former KB Toys spaces of roughly 4,000 sf. We expect at least 10% of these pop-up locations may become permanent Toys R Us Express stores. They also want to convert as many as 70% of their existing nearly 1,400 locations into 55,000 to 70,000 sf Superstores with Toys R Us/Babies R Us combos.	3,000 to 5,000 sf (pop-ups); 20,000 to 40,000 sf	Multiple US Markets
Tractor Supply	Tractor Supply has plans for at least 75 new stores in 2011.	15,000 to 18,000 sf	Multiple US Markets
Trader Joe's	Trader Joe's has two Kansas City area stores on tap for 2011 and is also expanding in the NYC market. Our sources tell us to expect at least 20 new stores in 2011.	10,000 to 18,000 sf	Multiple US Markets; Midwest; Eastern US
True Religion Brand Jeans	True Religion wants to open as many as 50 new stores in 2011.	2,500 to 3,000 sf	Multiple US Markets
True Value Hardware	True Value looks to continue to expand in 2011, primarily in rural markets. They opened, relocated or remodeled just over 100 stores in 2010 and we expect them to keep roughly the same pace in 2011.	8,000 sf	Multiple US Rural Markets
Tuesday Morning	Tuesday Morning is looking for expansion opportunities within its existing marketplaces over the next 18 months. Growth plans have not been released, but we expect at least five to ten new units in this time frame.	8,000 to 10,000 sf	Multiple US Markets

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“Walmart is expanding aggressively across a wide variety of formats. In addition to Supercentre they are also expanding medium & smaller format grocery concept. Look for as many as 400 new North American stores over the next couple of years.”

U

V

W

Chain	Planned Units	Footprint	Regions
Tutoring Club	Tutoring Club is looking to expand in 2011, though numbers have not been released. The chain is looking to break into the Denver and Birmingham markets, our sources tell us to expect at least five new units.	1,000 to 1,500 sf	Multiple US Markets
ULTA	ULTA currently has 60 new stores planned for 2011 and 80 on tap for 2012.	10,000 sf	Multiple US Markets
Ultimate Electronics	Electronics chain was looking to add units in 2011, but the recent bankruptcy filing of its parent company will likely mean the chain will be closing, not opening, stores in 2011.	28,000 to 40,000 sf	Multiple US Markets
Under Armour	Under Armour has plans for as many as 19 new stores in 2011.	4,000 to 4,500 sf	Multiple US Markets
Uniqlo	Plans on as many as 200 new US Stores through 2020.	3,000 to 7,000 sf	Multiple US Markets
Urban Outfitters/ Anthropologie/ Free People/new bridal concept	Urban Outfitters has plans to open as many as 45 stores over the next year. This includes Free People and Anthropologie openings. Ultimately the chain would like to grow from current levels of about 140 stores to 250. They will also be aggressive with the rollout of their new bridal concept over the next 24 months.	8,000 to 15,000 sf	Multiple US Markets
U.S. Cellular	Plans call for as many as 30 new stores in 2011.	1,500 to 3,500 sf	Multiple US Markets
Vallarta Supermarkets	Regional ethnic grocery player Vallarta opened three new stores in 2010 and we expect 2011 growth to likely surpass this level. We expect as many as five new stores.	40,000 to 45,000 sf	California
Vera Bradley	This chain has plans for as many as 16 new stores in 2011.	2,000 to 4,000 sf	Multiple US Markets
Verizon Wireless	Has typically opened 100+ stores annually in recent years via franchise growth. We expect 2011 totals to top 125.	2,500 to 5,000 sf	Multiple US Markets
V.I.M.	We expect this chain to add as many as three units in the next 18 months.	10,000 sf	NJ, NY
Vitamin Shoppe, The	Vitamin Shoppe is looking to open as many as 52 new stores in 2011.	1,500 to 2,500 sf	Multiple US Markets
Von Maur Department Stores	Two new stores for 2011.	60,000 sf+	Atlanta
Walgreen's	Following the breakneck pace of last year when they opened nearly 300 new stores and also added 258 units from Duane Reade into the mix, Walgreen's is looking to slow growth somewhat in 2011. Still, our sources are telling us that this means a minimum of 200 new units and possibly more.	15,000 sf	Multiple US Markets
Walmart	Up to 400 new stores throughout North America over next 30 months. Walmart's smaller concept Neighborhood Market (+/- 20,000 sf) should see a minimum of 40 openings in 2011, with an even bigger push in 2012. At the same time, the chain is looking at opening as many as 50 new Supercenters this year. It also remains opportunistic in terms of acquiring second-generation space. They have acquired a number of former Mervyn's spaces on the West Coast where they will be launching 80,000 sf grocery only stores.	10,000 to 150,000 sf	Multiple US Markets

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Chain	Planned Units	Footprint	Regions
Wash & Tan	This chain is looking to grow in 2011, though growth targets have not been released. We expect as many as five new units over the next 24 months.	3,000 to 5,000 sf	Multiple US Markets
Walt's Food Center	This regional grocer is looking to expand in Illinois in 2011. We expect two to three new units over the next 24 months.	45,000 to 55,000 sf	Illinois
Wegmans	Regional grocery player Wegmans is looking to expand in 2011, though growth projections have not been released. We expect as many as four or five new units over the next 18 to 24 months.	120,000 to 140,000 sf	Eastern US
Wet Seal	The Wet Seal has plans to open 60 new stores in 2011.	3,900 to 6,000 sf	Multiple US Markets
White House/Black Market	WH/BM would like to eventually double in size to about 475 full-line stores and 125 outlets. We expect a minimum of 30 new units in the next 18 months.	3,300 sf	Multiple US Markets
Whole Foods	Whole Foods will open at least 17 new stores in 2011, but this number may go up. The chain has a pipeline approaching 50 units through 2013.	25,000 to 45,000 sf	Multiple US Markets
Williams-Sonoma/Pottery Barn/West Elm	Williams-Sonoma only opened four new stores in 2010 across most of its divisions (Pottery Barn accounted for most growth). The chain remains in conservative growth mode, closing under performers while opening only a handful of stores.	10,000 to 20,000 sf	Multiple US Markets
Winco Foods	Winco is looking to expand throughout the Western US in the coming year. Total growth numbers have not yet been shared, but our sources tell us there could be as many as 10 new stores in the next 24 months.	90,00 to 100,000 sf	Western US
Winn-Dixie	Winn-Dixie will put its emphasis on remodels in 2011, with at least 22 on tap for the coming year. That being said, the chain would also like open five new stores.	55,000 to 75,000 sf	Southern US
Wonder! Stores	Wonder! saw two new stores open in 2010 and had as many as three more on tap for 2011. By year's end we would not be surprised to see four or five new units. Ultimately the chain wants 19 superstores in the next five years.	135,000 sf	Midwest
X XSport Fitness	Plans call for at least two new units in the greater New York area over next 18 months, but our sources tell us this number could increase.	40,000 to 50,000 sf	CT, NJ, NY
Y Yankee Candle Company	Yankee Candle would like to open as many as 30 stores in 2011.	1,500 to 1,700 sf	Multiple US Markets
Z Zara	Zara just opened its 50 <sup>th</sup> US store in December 2010. Though 2011 growth numbers have not yet been released, we expect the Spanish retailer to keep a similar pace in 2011. Expect at least ten and as many as 20 new units.	3,000 to 5,000 sf	Multiple US Markets
Ziggy's	This home improvement chain will likely add at least one new store in 2011; possibly two over the next 18 months.	45,000 to 110,000 sf	Pacific Northwest
Zoo Health	Zoo is a regional health club player who would like to reach the ten unit per year growth level.	6,000 to 8,000 sf	Midwest; Southern US
Zumiez	This skate shop chain would like to open as many as 30 new stores in 2011.	2,500 to 4,000 sf	Multiple US Markets

# Restaurant



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“Baskin-Robbins is looking to add as many as 60 standalone units and 100 co-branded (with Dunkin Donuts) stores in 2011.”

A

B

Chain	Planned Units	Footprint	Regions
A&W/Yum	Most A&W growth has been franchise driven. Because of Yum's pending (as of 1/2011) plans to sell the chain, growth plans for 2011 are currently unclear.	2,500 to 3,500 sf	Multiple US Markets
Abbott's Frozen Custard	Abbott's is looking to grow in the Eastern US in 2011, primarily via franchisees. We expect as many as five new units this year.	700 to 1,000 sf	Eastern US
Arby's/Wendy's	Arby's is looking for space in a number of markets, however, its current status of being for sale somewhat clouds overall growth projections for 2011. A new buyer could significantly ramp up expansion or go the other way—trimming under performing locations. Still, we expect at least 25 new units this year.. but that is a gross—not net—total.	2,500 to 3,500 sf	Multiple US Markets
Au Bon Pain	Casual bakery/café concept is in the middle of a rollout in the Washington DC market that should add at least three stores there. Our sources tell us that national growth should be at least seven units in the next 18 months.	2,200 to 3,000 sf	Multiple US Markets
Auntie Anne's	Most growth has been franchise driven. We expect at least 50 new units in 2011, but this is an estimate.	450 to 600 sf	Multiple US Markets
Baker's Street Pub & Grill	Pub chain is looking to grow in 2011—likely to add as many as three units in coming year.	6,000 to 7,000 sf	Florida
Banna Strow's	This crepe concept is looking to grow by as many as 20 units in 2011. Ultimately, they would like to see franchisee growth help them reach the 125-unit level by 2015.	140 to 800 sf	Multiple US Markets
Baskin-Robbins	Baskin would like to see as many as 60 new units in 2011 for solo units and as many as 100 co-branded Dunkin Donuts co-branded units in 2011.	800 to 2,400 sf	Multiple US Markets
Bd's Mongolian Grill	Bd's is looking to grow aggressively in 2011 via franchise growth with a number of new markets on their expansion list. Our sources tell us they could add as many as 25 new restaurants over the next 18 months.	5,500 to 6,500 sf	Multiple US Markets
Between Rounds Sandwich Café	This regional player is looking to grow by at least a couple of units, possibly more, over the next 18 months.	2,500 to 3,000 sf	New England
BJ's Brewhouse	As many as 13 new restaurants in 2011.	6,000 to 10,000 sf	Multiple US Markets
Blaze Modern BBQ/White Castle	New BBQ concept from White Castle. Numbers have not been released, but we expect at least eight units in 2011.	2,000 to 3,500 sf	Midwest
Bob Evans/Mimi's Café	Bob Evans will open at least two new units in the first half of 2011, but no other numbers have been released. Our guess is that they will open at least five throughout the year. Meanwhile, Mimi's Café also has not released growth plans, but we suspect they will keep pace with last year's two new units.	5,000 to 6,000 sf	Multiple US Markets

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“Chick Fil-A will add as many as 80 new restaurants in 2011.”

Chain	Planned Units	Footprint	Regions
Bojangles Chicken n Biscuits	Bojangles long-term plan is to add as many as 1,000 new restaurants in existing markets before looking to branch into new territories. The chain opened about 44 new stores in 2010. We expect them to surpass 50 in 2011.	2,000 to 3,800 sf	Southern US
Bravo Rio Restaurants/ Brio Tuscan Grill/ Bravo! Cucina Italiano/Bon Vie Bistro	Bravo Rio may open as many as ten new restaurants in 2011. After that, the chain wants to open as many as 50 units annually across all of its concepts.	4,000 to 8,500 sf	Multiple US Markets
Brothers Bar & Grill	Chain is looking to expand over the next 18 months. We estimate at least five new units in that time frame.	6,000 to 8,000 sf	Midwest, Southwest
Bruegger's	Bruegger's is looking to open a minimum of 25 new stores in 2011, though this number may reach as high as 35.	1,500 to 2,500 sf	Eastern US, Midwest
Bruster's Real Ice Cream	Bruster's is looking to expand via franchisees in a number of markets. We expect the chain to likely achieve expansion in the 20-unit range in 2011.	1,200 sf	East of the Rockies
Buffalo Wild Wings	A minimum of 19 Florida and Michigan locations through 2017. That being said, they added about 70 total units last year and we expect as many as 100 in 2011.	4,000 to 7,000 sf	Multiple US Markets
Buffalo Wings & Rings	This chain opened about 10 new units in 2010 and should see about 15 in 2011.	4,500 to 5,500 sf	Midwest, Southern US
Burger King	Most growth has been franchise driven. We expect at least 100 new units in 2011, but this is an estimate.	2,500 to 3,500 sf	Multiple US Markets
California Tortilla	At least 10 new locations in 2011.	2,000 to 3,500 sf	Eastern US
California Pizza Kitchen	Plans on strong franchise driven growth in multiple markets—at least 35 new units in the mid-Atlantic region alone over the next eight years. We expect CPK to add at least 20 units nationally in 2011.	3,000 to 5,000 sf	Multiple US Markets
Charley's Grilled Subs	Plans for as many as 100 franchised locations in 2011.	2,000 to 3,500 sf	Multiple US Markets
Checkers/Rally's	Checker's and Rally's recently has been expanding in New York City and has development deals in the works with franchisees in Atlanta, Baltimore, Chicago, Detroit, Philadelphia and a few other markets. We expect at least 125 new units in 2011.	1,000 sf to 1,500 sf kiosks with dual drive-thru window capability.	Multiple US Markets
Cheeburger Cheeburger	As many as 12 new units through July 2011.	2,000 to 3,500 sf	Multiple US Markets
Chick-fil-A	We expect between 75 and 80 new units in 2011. The chain is currently ramping up growth in Chicago (as many as 14 locations through 2015) and Washington DC (two new stores in 2011) and will reportedly ramp up expansion in St. Louis as well.	2,500 to 3,500 sf	Multiple US Markets
Chipotle	We expect as many as 130 new Chipotle locations in 2011. The chain recently arrived in Memphis with plans for eight stores there over next three years.	1,700 to 3,200 sf	Multiple US Markets

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Chain	Planned Units	Footprint	Regions
Chipotle's new fast casual Asian concept	The name of this concept and growth plans have not yet been released, however, we would be surprised if Chipotle does not add at least 100 of these into the mix over the next 24 months.	1,700 to 3,200 sf	Multiple US Markets
Church's Chicken	Numbers have not been released for Church's, but we expect at least ten new units in 2011.	1,200 to 2,000 sf	Multiple US Markets
Coffee Bean & Tea Leaf	Looking to grow in Southern California by as many as ten units in the next 18 months.	1,000 to 1,600 sf	Southern California
Cold Stone Creamery	Cold Stone will try to keep a pace of 100 new stores in 2011 and 2012.	1,200 sf	Multiple US Markets
Corner Bakery Café	We expect as many as 20 units throughout 2011. The chain is currently pushing into New Jersey with plans for as many as 35 new units there through 2018. In Texas alone it is planning on 50 stores over the next eight years.	2,000 to 3,500 sf	Multiple US Markets
Cracker Barrel	Cracker Barrel opened six units last year and reportedly wants to boost that number in 2011, though no numbers have been released. We expect the chain will likely add at least seven units in 2011.	10,000 sf	Multiple US Markets excluding West Coast
Crumbs	This NYC-based cupcake concept is looking to aggressively grow and hopes to open as many as 200 units in the next three years.	1,000 to 2,000 sf	Multiple US Markets
<b>D</b> Dairy Queen/Orange Julius	DQ/Orange Julius will continue to grow via franchisees in 2011. We expect at least 40 new units.	800 to 1,800 sf	Multiple US Markets
D'Angelo Grilled Sandwiches	Plans call for at least ten new stores over the next 18 months. However, their multi-year goal is to add as many as 200 new locations in the next five years, so this number may skyrocket in 2011 if their franchising efforts are successful.	1,500 sf	East Coast
Darden/Capital Grille/Longhorn Steakhouse/Olive Garden/Red Lobster	Darden opened 63 restaurants in 2010. We expect as many as 70 in 2011. The chain recently unveiled a co-branded Olive Garden/Red Lobster template that they are testing in Florida. Capital Grille is looking to open at least four new units in 2011.	6,000 to 9,000 sf	Multiple US Markets
Deckers/White Castle	Deckers is White Castle's new deli concept. No plans have been announced yet, but initial rollout begins this year. We expect at least eight new units in 2011.	2,000 to 3,000 sf	Midwest
Denny's/Denny's Cafe	Denny's has 111 projected openings on the board for 2011, however, 80 of these will be within Flying J Travel Centers. The chain also has a new smaller format concept, Denny's Café, that could see as many as 1,500 locations over the next decade.	4,000 to 6,000 sf	Multiple US Markets
Dickey's BBQ Pit	Likely to add as many as 20 new stores over the next three years.	2,000 to 3,000 sf	Eastern US; Southern US
Dinosaur Bar-BQ	We are told that Dinosaur is in the market for at least two new locations in 2011; either in the Boston or greater NYC markets.	5,000 to 10,000 sf	Eastern US
Dixie Lee Chicken & Seafood	Plans call for 15 new units over the next 18 months. Growth will include some domestic and international sites.	2,000 sf	Multiple US Markets
Domino's	Domino's actually closed more US locations than it opened last year. Most of the chain's growth has been focused overseas. That being said, we do expect their domestic unit counts to increase in 2011... likely by at least 20.	1,200 to 1,400 sf	Multiple US Markets

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“Freebirds World Burrito is on tap to add at least 20 units in 2011.”

Chain	Planned Units	Footprint	Regions
Dunkin Donuts	Franchise growth is typically above 500 units worldwide each year. We expect DD to open at least 350 U.S. units in 2011.	800 to 2,000 sf	Multiple US Markets
Dunn Brothers Coffee	Chain is looking to grow over next 18 months—primarily through franchisees. We expect at least five new units.	1,200 to 1,800 sf	Central US
Eat N’Park Restaurants	Looking to add two units in 2011.	6,500 sf	Pennsylvania
Einstein Brothers Bagels	Einstein is currently pushing into the Chicago market with five new locations through 2015. Nationally, we expect at least 15 to 20 units in 2011.	2,000 to 3,000 sf	Multiple US Markets
El Pollo Loco	El Pollo Loco only opened about five new stores—all in California—in 2010. We expect this number to at least double in 2011.	1,800 to 2,800 sf	Western US
Energy Kitchen	Energy is pushing into the New York market with plans for three restaurants over the next 18 months. Throughout the US, the chain has plans for as many as 50 new units in 201.	2,000 to 3,000 sf	Multiple US Markets
Family Buffet Restaurants	This regional chain is looking to expand over the next 18 months. Numbers have not been released, but our sources tell us they may be looking to add as many as three units.	6,500 to 12,000 sf	New England
Famous Dave’s of America	Famous Dave’s will likely see at least ten to 15 new units in 2011.	2,000 to 3,000 sf	Eastern US
Fatburger	Fatburger is planning on as many as 40 new units in 2011.	2,000 to 3,000 sf	Multiple US Markets
Fazoli’s	Fazoli’s continues to target the Midwest for growth. Expansion projections have not been released, but our sources tell us to expect as many as ten units over the next 24 months.	2,000 to 4,000 sf	Midwest
Firehouse Subs	Firehouse is likely to open at least 70 new units in 2011. The chain recently inked a franchise deal that could add as many as 30 units to the Tampa Bay market over the next five years.	1,500 to 2,000 sf	Multiple US Markets
Five Guys Burgers & Fries	Five Guys opened more than 200 units in 2010 and we expect 2011 growth to likely be around 225 units.	2,500 sf	Multiple US Markets
Flamer’s Burgers & Chicken	Chain is looking to grow over the next 18 months—primarily via franchisees. We expect as many as five new units over the next couple of years.	600 to 1,200 sf	East of the Rockies
Fresh Choice	This chain has not grown much in recent years, but our sources tell us that 2011 may see some minimal expansion... perhaps as many as five units over the next 18 months	10,000 sf	California
Freebirds World Burrito	Freebirds is planning on at least 20 units in 2011. 16 will be in California.	1,800 to 3,500 sf	Multiple US Markets, but California and Texas lead the way
Friendly’s/ Friendly’s Express	Friendly’s has plans for at least eight new units in 2011, but our sources tell us this number could go higher.	2,500 sf	Eastern US
Fresh-A-Peel/ Pollo Campero	This new Pollo Campero concept is likely to add at least ten units through 2013.	1,500 to 2,500 sf	Florida, Southwest... markets with strong Hispanic demographics

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“In-N-Out Burger has expanded to Texas and should add at least 15 units in 2011. This number could skyrocket if rumors are true that the company may go public.”

Chain	Planned Units	Footprint	Regions
G	Garbanzo Mediterranean Grill	We expect as many as ten new units.	2,500 to 3,500 sf Multiple US Markets
	Genghis Grill	Genghis is hoping to open 100 new restaurants in 2011.	3,200 to 6,000 sf Southern US, Southwest
	Gigi's Cupcakes	Likely to add at least ten units in 2011.	1,000 to 2,000 sf East of the Rockies
	Golden Chick	Numbers have not been released for Golden Chick, but we expect a likely addition of at least five units over the next 18 months in existing markets.	2,000 sf Texas; Southern US
	Gott's Roadside	Gott's, formerly known as Taylor's Refresher, is looking to grow by as many as four units over the next 24 months.	2,000 to 3,000 sf Northern California
H	Haagen-Dazs	Look for as many as 25 openings in 2011.	500 to 1,200 sf Multiple US Markets
	Habit Burger	Chain is currently expanding in Northern California with plans for multiple units.	1,500 to 2,200 sf Northern California
	Happy Joe's Pizza & Ice Cream	Chain is looking to expand over the next 18 months. Though numbers have not been disclosed, we expect at least five new units during this time frame.	1,500 to 5,000 sf Midwest
	Hook Burger Bistro	New concept from founders of The Habit Burger. Likely to add ten units over next 24 months.	2,000 to 3,000 sf California
	Hooters	Looking to add as many as 400 new units over the next five years. About 100 of these will be in the US.	4,000 to 6,000 sf Multiple US Markets
	Huddle House	Huddle House growth is primarily franchisee driven. Last year it opened its first drive-thru concept and also has a larger footprint available. No numbers have been released, but we expect this chain to add between five and ten units in 2011.	1,800 to 2,100 sf Southern US
	HuHot Mongolian Grill	Is exploring new smaller concept, HuHot Express, which could add as many as 20 units over the next 24 months. At least 11 new restaurants are on tap for 2011.	5,500 to 6,000 sf Central US
	Hungry Howie's Pizza	Plans on as many as 45 new units over the next three years.	1,500 to 2,500 sf Southern US
	Hurricane Grill & Wings	Hurricane wants to add 26 units in 2011.	1,200 to 1,800 sf Multiple US Markets
	Ichiban Japan/ Fuji Express/ Wynn's	These sister concepts are looking to grow, though our sources tell us most of this will be in the Nashville market. Expect as many as three new units in the next 18 months	500 to 3,000 sf Nashville
	IHOP	Franchise-driven growth in 2011 is likely to exceed 50 units. The chain has averaged 60 to 70 openings annually in recent years and should meet that pace this year.	5,000 sf Multiple US Markets
	In-N-Out Burger	We estimate as many as 15 new units in 2011. However, there are rumors that In-N-Out may go public. Were this to happen, we expect growth plans to increase exponentially. Chain recently expanded to Texas where as many as ten units will be added through 2012.	2,500 to 3,500 sf Western US
	Islands	Islands is looking for growth opportunities in California over the next 18 months. We expect as many as three to five new units.	5,000 to 6,000 sf Western US



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**Garrick H. Brown**  
 Retail Research Director  
 916.329.1558  
 gbrown@terranomics.com



**CHAINLINKS**  
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Chain	Planned Units	Footprint	Regions
<b>J</b> Jack in the Box	Growth plans have not been released.	2,000 to 3,500 sf	Multiple US Markets
Jersey Mike's Subs	Jersey Mike's is planning on expanding in Texas in 2011. We estimate between five and ten new units.	1,500 to 2,500 sf	Texas
Jimmy John's	Franchise growth ahead for this chain. We expect at least 30 new units in 2011, but this number could be low if the chain's efforts pay off.	1,000 to 2,000 sf	Eastern US
Juice It Up	This franchise driven chain would like to open at least ten new units in the distant future.	800 to 1,200 sf	Multiple US Markets
<b>K</b> Kentucky Fried Chicken/Yum	All Yum concepts are currently focusing the lion's share of their growth in Asia, however, there will likely be at least 100 new franchise units this year. That being said, the chain only opened about 11 new US stores in 2010. We expect at least 20 new units in 2011.	1,500 to 3,500 sf	Multiple US Markets
Kolache Factory	Would like to expand over the next 18 months. Numbers were not available as this report went to press. We expect minimum of three units.	1,600 to 1,800 sf	Central US
Krispy Kreme	Krispy Kreme had been in consolidation mode until last year when the chain closed with about 50 new stores. We expect at least as many over the next 18 months via a mix of franchisees and company-owned stores.	1,000 to 2,400 sf	Multiple US Markets
Krispy Krunchy Chicken	Likely to add as many as 20 units in 2011.	2,000 to 3,500 sf	Midwest, Southern US
<b>L</b> LaRosa's	LaRosa's is looking to add as many as ten units over the next 18 months.	1,200 to 5,800 sf	Eastern US
Laughing Noodle/White Castle	This new Asian concept from White Castle has yet to announce growth plans, but we expect as many as ten units in 2011.	2,000 to 3,500 sf	Midwest
Lee's Hoagie House	Looking for multiple locations over the next 18 months—we expect at least five new units in the next couple of years.	1,200 to 1,800 sf	Mid-Atlantic states
Legal Sea Foods	Looking for multiple locations over the next 18 months—we expect as many as five new units.	4,500 to 8,000 sf	Eastern and Southern US
Little Caesar's	Chain typically grows via franchisees. They are currently on an expansion push in the Boston area with hopes of opening as many as ten stores in the next two years. We expect national growth to be no less than 100 new units in 2011.	1,100 to 2,000 sf	Multiple US Markets
Long John Silver's/Yum	Most growth has been franchise driven. Because of Yum's pending (as of 1/2011) plans to sell the chain, growth plans for 2011 are currently unclear.	1,500 to 3,500 sf	Multiple US Markets
<b>M</b> Mamma Ilardo's Pizzeria	Looking for multiple locations over the next 18 months—we expect at least five new units.	400 to 1,900 sf	DC, MD, NV
Marco's Pizza	Chain wants to grow via franchisees by as many as 1,000 units over the next seven years. They should open a minimum of 75 new stores in 2011.	1,500 sf	Multiple US Markets
Marvelous Market	This deli and bakery concept is looking to grow over the next 18 months. We expect at least a couple of new units.	1,000 to 2,000 sf	Washington DC
McAlister's Deli	Chain could open as many as 25 units in the next year.	1,200 to 2,800 sf	South, Midwest, Northeast

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“Macro’s’s Pizza should add at least 75 units in 2011.”

Chain	Planned Units	Footprint	Regions
Menchie's Frozen Yogurt	Menchie's growth is primarily franchise driven. We expect at least five and possibly as many as ten new units from them in 2011. Our sources tell us that though the chain is looking to expand throughout the US, much of this year's growth may be in the Southeastern states.	900 to 1,800 sf	Multiple US Markets; Southeast US
Moe's Southwest Grill	Moe's is looking to add as many as nine new units in Boston alone over the next two years. Another franchisee is on board in Connecticut to open as many as 12 units over the next few years. In St. Louis, as many as 15 are slated for delivery over the next few years. Total 2011 growth projections were not available, but we expect as many as 45 new units.	2,000 to 3,000 sf	Multiple US Markets
Mooyah Burger	Mooyah is planning on as many as 50 new units over the next three years.	2,000 to 3,000 sf	South Central US
Muscle Maker Grill	Muscle Maker recently inked a five unit franchisee deal for the San Francisco Bay Area. They also continue to expand in other markets. We expect at least ten to 15 new units in the next 18 to 24 months.	2,00 to 3,000 sf	Multiple US Markets
NakedPizza	Naked wants to open as many as 27 units in 2011.	2,000 to 3,200 sf	Multiple US Markets
Nespresso	This chain would eventually like to grow from its current size of 13 units to about 30.	1,000 to 2,000 sf	Eastern US
Niko Niko	This 20-unit Southern California regional Japanese chain is looking to grow in the months ahead. We expect as many as three new units in the next 18 months.	1,700 to 3,200 sf	Southern California
Noodles & Company	Noodles & Company is in aggressive growth mode. We do not have official growth projections, but expect as many as 30 new units from this chain.	2,000 to 4,000 sf	Multiple US Markets
Olga's Kitchen	This chain is looking to enter nine markets in 2011 as part of a plan to open more than 100 restaurants over the next five years. We expect at least 20 new units in 2011.	2,000 to 3,500 sf	Eastern US; Midwest
Original Soupman	This chain is looking for as many as ten new units in 2011.	1,200 sf	Eastern US
Paisano's Pizza	Likely to add as many as 50 units over next five years.	2,000 to 3,200 sf	Eastern US
Pancho's Mexican Grill	Pancho's is likely to open between four and six new units in 2011.	2,000 to 3,200 sf	Midwest
Panda Express	Panda is planning on adding 950 units through 2015. At least 100 units in 2011.	1,800 to 2,700 sf	Multiple US Markets
Panera	Panera is planning on at least 100 new units in 2011.	2,500 to 4,500 sf	Multiple US Markets
Papa John's Pizza	Papa John's wants to open as many as 120 new stores annually for both 2011 and 2012. The chain primarily grows via its franchising efforts.	800 to 1,500 sf	Multiple US Markets
Papa Murphy's Pizza	Papa Murphy's is planning on at least 150 new units for 2011 and as many as 200 for 2012. The chain primarily expands via its franchising efforts.	1,200 to 1,400 sf	Multiple US Markets
Paxti's Chicago Pizza	Looking at as many as five new units through midyear 2012.	2,000 to 3,500 sf	California
Pei Wei/PF Chang's	Pei Wei is looking to add as many as 18 units in 2011.	2,800 to 3,200 sf	Multiple US Markets

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“Pinkberry will likely add at least 100 new stores this year.”

Chain	Planned Units	Footprint	Regions
Penn Station East Coast Subs	Looking to add as many as 100 units through 2013.	1,500 to 2,500 sf	Chain is focusing on Midwest growth initially, but plans national push soon
Pinkberry	Pinkberry would like to hit as many as 100 new stores in 2011.	1,000 to 1,200 sf	Multiple US Markets
Pita Jungle	At least four, possibly more, in 2011	1,500 to 3,000	Arizona, Southern California
Pizza Hut/Yum	All Yum concepts are currently focusing the lion's share of their growth in Asia, however, there will likely be at least 100 new franchise units in the US this year.	1,500 to 3,500 sf	Multiple US Markets
Pizza Inn	We expect as many as 20 new units in 2011.	2,100 to 4,500 sf	Southern US
Pizza Patron	We expect as many as ten new units in 2010. The chain recently inked a deal with a franchisee that could bring as many as 11 units to San Diego over the next three years.	2,000 to 3,500 sf	Western US
Pluckers	Pluckers is another wing chain on an expansion bent. The chain could add as many as five new units over the next 18 months	6,500 sf	Texas
Pollo Campero	This chain continues to focus most of its growth internationally, though we would not be surprised to see at least 10 new US units in 2011.	1,800 to 2,200 sf	Multiple US Markets
Popeye's	Popeye's is pushing into the Philadelphia metro as well as a handful of others. The chain opened about 120 new units in 2010 and we expect them to match or beat those numbers in 2011. Look for as many as 130 new Popeye's in 2011.	1,000 to 2,200 sf	Multiple US Markets
Pret-A-Manger	We expect between five and ten new units in 2011. Chain recently began a push in the DC market.	2,000 to 3,500 sf	Eastern US
Qdoba Mexican Grill	Likely to add at least 25 units in 2011. The chain is looking to aggressively grow in the mid-Atlantic states.	2,000 to 3,000 sf	Multiple US Markets
Quaker Steak N Lube	Quaker plans on opening as many as ten new units through July 2011.	5,000 to 8,000 sf	Eastern US
Quizno's	Quizno's wants to see as many as 600 new units in 2011. The chain grows via franchisees so whether they reach that number is questionable, but they are aggressively looking to recruit.	1,200 to 1,600 sf	Multiple US Markets
Red Mango	Red Mango's plans call for at least 100 new units in just 2011. That number may increase in 2012.	1,000 to 1,500 sf	Multiple US Markets
Red Robin	We expect ten to 15 new units	4,000 to 6,000 sf	Multiple US Markets; push in Florida and New Jersey
Robeks Smoothies	Robeks will open as many as 25 new units over the next 24 months.	800 to 1,000 sf	Multiple US Markets
Rock On	As many as ten units planned through 2014	2,000 to 4,000 sf	Midwest
Rojo Mexican Bistro	As many as five new units over next 24 months	2,000 to 4,000 sf	Michigan

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Chain	Planned Units	Footprint	Regions
Rubio's Fresh Mexican Grill	Rubio's will likely open around ten new locations in 2011.	2,000 to 3,000 sf	Western US
Ruby Tuesday/ Lime Fresh Mexican Grill	Most of Ruby Tuesday's growth will be via its new fresh Mex concept, Lime Fresh. Lime Fresh is looking to open 12 new units through 2012.	1,800 to 2,800 sf	Multiple US Markets
Saladworks	Likely to see at least 25 new units in 2011.	2,000 to 4,000 sf	CA, CT, DC, MD, NC, TX
Sbarro	Sbarro will likely open at least 80 new stores in 2011, though the chain continues to close under performers.	750 sf	Multiple US Markets
Seattle's Best Coffee	Chain expected to add as many as 20 units in 2011. Recently began push in Chicago market.	1,500 to 2,500 sf	Multiple US Markets
Sensebowl	New fast Asian concept growing in NYC with as many as six locations in Manhattan planned for next 24 months.	2,000 to 4,000 sf	New York City
Shane's Rib Shack	Plans on as many as 50 new units over next three years.	2,000 to 4,000 sf	Southeast US
Shari's Restaurants	Shari's is looking to expand in existing markets over the next 18 months. Unit counts have not been disclosed, but we expect at least three to four new restaurants in the near future.	4,900 sf	Western US
Smashburger	Smashburger is likely to open well over 100 units in 2011. Plans include up to 12 each in St. Louis and Southern Ohio (over next 24 months), as many as 40 in Chicago (over next six years) and as many as three in Brooklyn.	2,000 to 4,000 sf	Multiple US Markets
SoGreen Yogurt	This new player (just three units in CA and NJ) is looking to rapidly grow in 2011. They hope to add 18 units in 18 months.	500 to 1,000 sf	Multiple US Markets
Sonic	Sonic would like to open as many as 85 new units in 2011.	1,500 to 1,700 sf	Multiple US Markets; New England
Souplantation/ Sweet Tomatoes	These sister chains want to grow by as many as ten locations annually over the next couple of years. Souplantation has a new Express model that should account for at least four of those units.	4,500 to 7,000 sf	Western US
Squeeze USA	Squeeze is looking to grow via franchisees. We expect there could be as many as five new units in the next 18 to 24 months.	800 to 1,600 sf	Southern California
Starbucks	Starbucks is back in expansion mode with at least 500 global and 100 US locations in the works for 2011.	1,500 to 4,000 sf	Multiple US Markets
Straw Hat Pizza	Straw Hat is growing primarily through franchisees, but has seven units slated for 1 <sup>st</sup> Qtr 2011 openings. We think the chain could see as many as 15 units through the entire year—mostly in California.	2,000 to 4,000 sf	Western US
Subway	Subway's typical annual franchise growth exceeds 700 units. We expect the same for 2011. Their hope is for 2,500 new units worldwide, but they are heavily dependent on franchise growth to reach their goals.	1,500 to 2,500 sf	Multiple US Markets
Sunshine Moon Peking Pub	New concept from the creator of PF Chang. This concept is likely to add as many as 10 units over the next 24 months.	4,000 to 6,000 sf	Western US
Suparossa Ristorante Italiano & Pizzeria	This Chicago based chain is looking to expand by as many as a couple of units or more in the next 18 months.	2,500 to 3,500 sf	Chicago

“Smashburger should add a minimum of 100 units in 2011.”



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“English noodle concept Wagamama plans on adding as many as 650 new US units over the next five years.”

T

Chain	Planned Units	Footprint	Regions
Taco Bell/Yum	All Yum concepts are currently focusing the lion's share of their growth in Asia, however, there will likely be at least 100 new franchise units in the US this year.	3,000 sf	Multiple US Markets
Taziki's Mediterranean Grill	Looking to open as many as five new units over next 18 months.	2,000 to 3,500 sf	Southeast US
TCBY	TCBY has plans to open as many as 200 of its new self-serve yogurt concepts in 2011. The chain grows primarily via franchisees. The chain also recently inked a deal for 200 units over the next decade with a Texas franchisee.	500 to 1,500 sf	Multiple US Markets
Ted's Montana Grill	Though the chain closed nine under performers in late 2010, it reportedly is looking for new locations in a handful of states. Our estimate is that Ted's opens about five new units at most in 2011.	5,000 to 8,000 sf	Multiple US Markets
Texas Roadhouse	The Roadhouse is looking at opening at least 20 new restaurants in 2011.	4,000 to 6,000 sf	Multiple US Markets
TGI Friday's	TGI typically grows through a mix of franchise and corporate growth. The chain is currently looking to open at least five Southern California units over the next 24 months, but is also active elsewhere. We expect between ten and 15 new units nationally in 2011.	6,500 to 7,700 sf	Multiple US Markets
Tim Horton's	The Canadian donut giant is looking to open as many as 300 units in the US through 2014. This should translate into as many as 60 units in 2011.	1,500 to 2,500 sf	Multiple US Markets, with Northeast and Midwest focus
Togo's	Togo's growth is franchise driven. We expect the chain to add at least 20 new units in the coming year. The chain wants to add as many as 50 units by the end of 2012, mostly in California.	1,500 to 2,500 sf	Western US
Top That! Pizza	Top That recently inked a 200-unit deal with a franchise group for Arkansas, Kansas, Oklahoma and Texas. These will not all come online in 2011, however. We expect at least 25 new units this year, with this number increasing next.	2,000 to 3,000 sf	AR, KS, OK, TX
Tootie Pie	Tootie Pie opened a handful of retail outlets in Texas in 2010. We expect the chain to add as many as five additional units in 2011.	1,500 to 2,500 sf	Texas
Tropical Smoothie Café	This chain wants to open 30 new stores in 2011.	1,200 to 1,500 sf	Midwest; Southern US
Twin Peaks	Twin Peaks is looking to open five new restaurants in 2011.	2,000 to 4,000 sf	AR, MO, OK
Wagamama	This noodle concept from the UK plans on expanding aggressively in the US—650 units expected over the next five years.	2,000 to 3,500 sf	Multiple US Markets
Wawa	Wawa has plans to open between 20 and 25 stores annually over the next three years.	1,800 to 2,600 sf	Multiple US Markets
Wendy's	Plans for 2011 include 20 new corporate stores and 45 new franchise stores in the US. Wendy's will increasingly shift growth plans to foreign markets. The chain has less than 400 units internationally but sees the opportunity for as many as 6,000.	2,500 to 3,500 sf	Multiple US Markets
Which Wich	Which Wich is expanding into the San Francisco Bay area in 2011. Nationally, they are counting on at least 50 new units in 2011.	1,800 to 2,800 sf	Multiple US Markets

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Chain	Planned Units	Footprint	Regions
White Castle	White Castle would like to add as many as nine new units in 2011, not counting new concepts.	2,000 sf	Midwest
Wingstop	This chain hit nearly 70 openings for 2010, look for as many as 90 in 2011. The chain recently inked a deal in the Baltimore market for ten new units in ten years.	1,500 to 1,800 sf	Multiple US Markets; Midwest
Wing Zone	Wing Zone is looking to open at least ten new stores in the next 18 months.	1,000 to 1,400 sf	East Coast, Midwest
WOW! Café	Wow! Wants 20 new units for 2011.	6,000 to 6,500 sf	Multiple US Markets
Y Yogurt Mountain	They added about eight new stores in 2010. We expect 2011 growth to come in at between eight and ten new units.	800 to 1,500 sf	Multiple US Markets
Z Zoup! Fresh Soup Company	Zoup! Wants to open as many as 50 new locations in 2011 and 70 in 2012.	2,000 sf	Multiple US Markets



## About ChainLinks

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For more information on ChainLinks or how we can assist in your real estate needs, contact:

**Marie Nash**  
ChainLinks Member Services Manager  
678.336.8970  
mnash@chainlinks.com

**Matt Kircher**  
ChainLinks President  
650.931.2220  
mkircher@terranomics.com

For more information on the Retailer & Restaurant Expansion Guide, contact

**Garrick H. Brown**  
Chainlinks Research Director  
916.329.1558  
gbrown@terranomics.com

