

WHITEWRIGHT RETAIL DEMAND GAP ANALYSIS

Estimated 2025-2026 retail demand, local supply, leakage and development opportunity for the 5-mile trade area centered on TX-11 and Rose Hill Road.

\$75.7M	\$42.0M	55%
SPECIFIED ANNUAL CONSUMER SPENDING	ESTIMATED UNMET DEMAND	ESTIMATED OVERALL LEAKAGE RATE

Primary trade area: 5-mile radius
Location: Whitewright, Texas
Prepared for: Rose Hill 11 Development

MARKET SNAPSHOT

Population 5,648

Median HH Income \$83,424

Daytime Employment 1,096

Food at Home Spending \$9.92M

Food Away from Home \$7.97M

Vehicle Purchases \$11.52M

US-69 Traffic 7,000-8,000 VPD

TX-11 Traffic ~3,400 VPD

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EXECUTIVE SUMMARY

The 5-mile trade area around Rose Hill Road and State Highway 11 contains approximately 5,648 residents and \$75.725 million in specified annual consumer spending. The local market has a limited retail base, with ten identified stores within one mile, including Spring Market, Dairy Queen, Domino's, Pizza Inn, Exxon and El Norte Meat Market. Based on observed inventory, category spending and modeled local capture, approximately \$42.0 million of annual spending is estimated to leave the immediate trade area.

\$76.0M	\$34.0M	\$42.0M	55%
MODELED RETAIL DEMAND	ESTIMATED LOCAL SUPPLY	ESTIMATED UNMET DEMAND	LEAKAGE RATE

Most actionable near-term categories 1. Grocery and daily needs 2. Full-service and limited-service restaurants 3. General merchandise and value retail 4. Hardware, farm supply and building materials 5. Medical, pharmacy and personal care 6. Selected automotive and service uses	Development conclusion The data support a phased neighborhood- and community-serving retail strategy rather than immediate large-format development. A prudent first phase is approximately 25,000-45,000 square feet, supplemented by restaurant, coffee, fuel and service-oriented pad sites.
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The strongest marketing position is not that Whitewright can support every missing retail category today. The defensible position is that the market has meaningful leakage in daily needs, restaurants, value retail, hardware/farm supply, medical services and selected automotive categories - creating a clear path for phased recruitment as residential growth continues.

ESTIMATED DEMAND, SUPPLY AND UNMET DEMAND

Dollar amounts are annual planning-level estimates for the 5-mile trade area. Leakage equals estimated unmet demand divided by estimated demand.

Retail Category	Demand	Local Supply	Unmet Demand	Leakage
Grocery Stores	\$9.92M	\$5.75M	\$4.17M	42%
Other General Merchandise Stores	\$4.80M	\$1.75M	\$3.05M	64%
Building Material & Supplies Dealers	\$3.90M	\$1.50M	\$2.40M	62%
Limited-Service Eating Places	\$4.38M	\$2.60M	\$1.78M	41%
Gasoline Stations	\$5.09M	\$3.50M	\$1.59M	31%
Health & Personal Care Stores	\$2.65M	\$1.20M	\$1.45M	55%
Full-Service Restaurants	\$3.59M	\$1.50M	\$2.09M	58%
Clothing Stores	\$2.85M	\$0.35M	\$2.50M	88%
Other Motor Vehicle Dealers	\$1.55M	\$0.65M	\$0.90M	58%
Electronics & Appliance Stores	\$3.55M	\$0.65M	\$2.90M	82%
Other Miscellaneous Store Retailers	\$2.15M	\$0.85M	\$1.30M	60%
Department Stores	\$3.75M	\$0.15M	\$3.60M	96%
Sporting Goods, Hobby & Musical Instrument Stores	\$1.97M	\$0.45M	\$1.52M	77%
Special Food Services	\$0.80M	\$0.25M	\$0.55M	69%
Lawn & Garden Equipment & Supplies Stores	\$1.45M	\$0.70M	\$0.75M	52%

ESTIMATED DEMAND, SUPPLY AND UNMET DEMAND - CONTINUED

Retail Category	Demand	Local Supply	Unmet Demand	Leakage
Beer, Wine & Liquor Stores	\$1.27M	\$0.85M	\$0.42M	33%
Office Supplies, Stationery & Gift Stores	\$0.95M	\$0.25M	\$0.70M	74%
Used Merchandise Stores	\$0.55M	\$0.20M	\$0.35M	64%
Direct Selling Establishments	\$0.45M	\$0.15M	\$0.30M	67%
Automotive Parts, Accessories & Tire Stores	\$1.55M	\$0.85M	\$0.70M	45%
Specialty Food Stores	\$0.95M	\$0.40M	\$0.55M	58%
Florists & Miscellaneous Store Retailers	\$0.60M	\$0.20M	\$0.40M	67%
Furniture Stores	\$2.05M	\$0.30M	\$1.75M	85%
Automobile Dealers	\$11.52M	\$5.75M	\$5.77M	50%
Home Furnishings Stores	\$1.60M	\$0.30M	\$1.30M	81%
Shoe Stores	\$0.88M	\$0.08M	\$0.80M	91%
Jewelry, Luggage & Leather Goods Stores	\$0.75M	\$0.10M	\$0.65M	87%
Book, Periodical & Music Stores	\$0.45M	\$0.05M	\$0.40M	89%
Electronic Shopping & Mail-Order Houses	\$4.10M	\$0.20M	\$3.90M	95%
Bars/Drinking Places	\$0.70M	\$0.25M	\$0.45M	64%
MODELED TOTALS	\$76.0M	\$34.0M	\$42.0M	55%

TOP OPPORTUNITIES AND REALISTIC TENANT FORMATS

Rank	Category	Estimated Gap	Practical Interpretation
1	Automobile Dealers	\$5.77M	Regional opportunity; not a neighborhood-center use.
2	Grocery Stores	\$4.17M	Strong daily-needs opportunity; smaller/value format is most realistic.
3	Electronic Shopping & Mail-Order Houses	\$3.90M	Large leakage, but much of it is not recoverable by physical retail.
4	Department Stores	\$3.60M	High leakage, but local population is too small for a conventional department store.
5	Other General Merchandise Stores	\$3.05M	Strong fit for value retail, farm/ranch and household essentials.
6	Electronics & Appliance Stores	\$2.90M	Best addressed through appliance, mobile, repair or specialty concepts.
7	Clothing Stores	\$2.50M	Boutique, western wear, workwear or value apparel.
8	Building Material & Supplies Dealers	\$2.40M	Strong fit for hardware, feed, equipment rental and contractor supply.
9	Full-Service Restaurants	\$2.09M	Strong recruitment target for family dining, Tex-Mex or barbecue.
10	Limited-Service Eating Places	\$1.78M	Strong pad-site opportunity for QSR, coffee and beverage concepts.

Priority recruitment targets

Category	Likely Concepts	Typical Format
Grocery / Daily Needs	Value grocer, specialty market, meat market, dollar-market hybrid	12,000-25,000 SF
Restaurants	Coffee, chicken, burger, Mexican, barbecue, family dining	1,000-6,000 SF
General Merchandise	Value retail, household goods, farm-and-ranch, workwear	8,000-20,000 SF
Hardware / Building	Hardware, feed, garden, equipment rental, contractor supply	8,000-20,000 SF
Medical / Personal Care	Pharmacy, urgent care, dental, therapy, vision, salon suites	2,000-10,000 SF

SUPPORTABLE SPACE AND DEVELOPMENT PHASING

Category	Estimated Gap	Assumed Sales/SF	Theoretical Supportable SF
Grocery	\$4.17M	\$425	9,812 SF
General Merchandise	\$3.05M	\$250	12,200 SF
Building Materials / Hardware	\$2.40M	\$225	10,667 SF
Limited-Service Restaurants	\$1.78M	\$600	2,967 SF
Full-Service Restaurants	\$2.09M	\$425	4,918 SF
Health / Personal Care	\$1.45M	\$400	3,625 SF
Clothing / Workwear	\$2.50M	\$275	9,091 SF
Electronics / Appliances	\$2.90M	\$375	7,733 SF
Sporting / Hobby / Outdoor	\$1.52M	\$250	6,080 SF
Furniture / Home Furnishings	\$3.05M	\$225	13,556 SF
Recommended Initial Program			Suggested Space
Grocery / value anchor			12,000-20,000 SF
Hardware / farm / general merchandise			8,000-15,000 SF
Medical / pharmacy / personal services			4,000-8,000 SF
Inline retail and restaurants			6,000-12,000 SF
Full-service restaurant pad			3,500-5,500 SF
Two QSR / coffee pads			1,000-3,500 SF each

Recommended first phase: approximately 25,000-45,000 square feet plus pad sites. This is intentionally below the theoretical supportable total because some spending will continue flowing to Sherman, McKinney, Bonham and online channels.