

Village of East Dundee Market Analysis



January 27, 2017
Updated Version

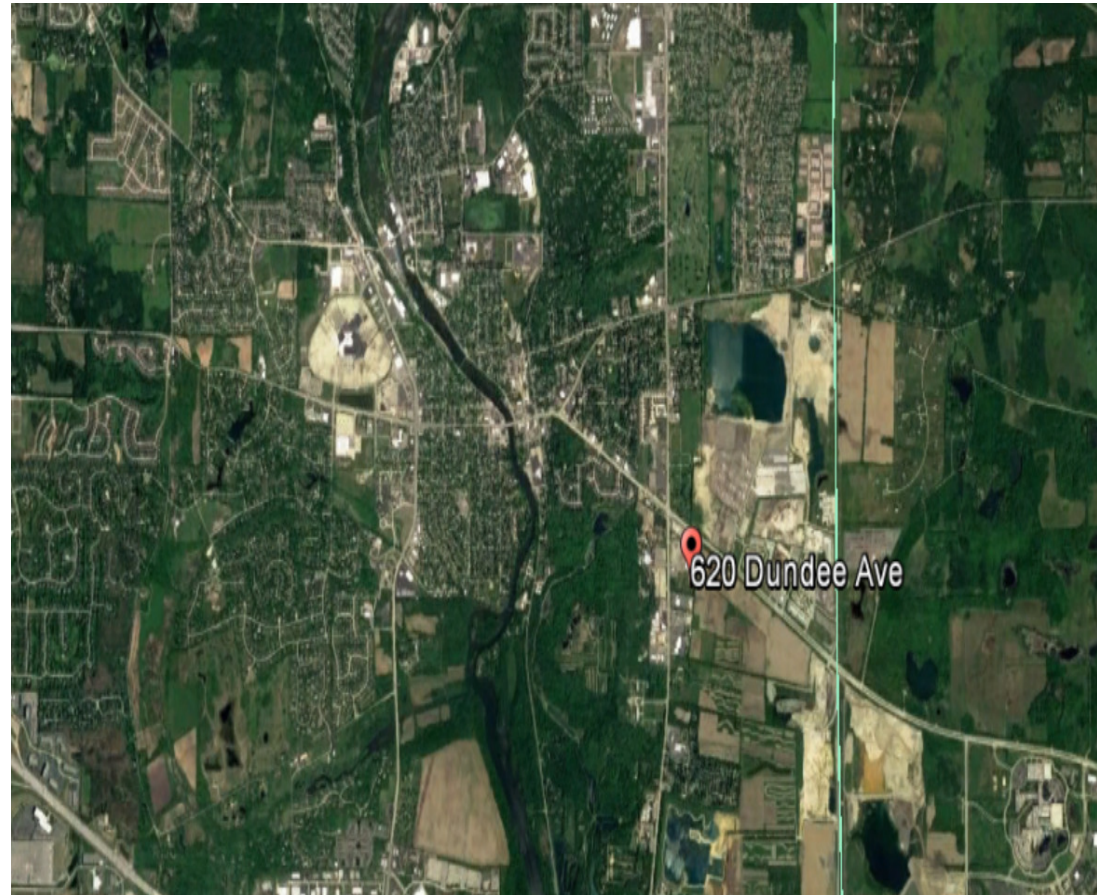


Property & Background

The Village of East Dundee has recently undertaken a market study to assess the potential retail opportunities at or/near the intersection of Dundee Avenue and Higgins Road (Routes 25 and 72) in East Dundee, IL 60118.

At the SE corner of this intersection, the site was recently vacated by Wal-Mart and this will be the site for determining the real trade area. At the NE Corner of this intersection there is a small shopping center called River Valley Square. There are vacancies within this center.

The Village of East Dundee occupies a three-square mile area and had a population of 3,000. The study will show the research that provides a picture of potential retail tenants using proprietary and third-party data sources.



620 Dundee Avenue Overview



- **View:** Heading South on Dundee Avenue directly in front of 620 Dundee Avenue. Wal-Mart, the former tenant, is still in the property at the time of this photo.



- **View:** Intersection of Dundee Avenue and Higgins Road, looking Southeast in the direction towards the property of 620 Dundee Avenue.

Methodology

- 1. Determine the trade area of the location.**

GPS, credit card, and geographic data show where the customers live, defining the geographic area to be analyzed.

- 2. Determine the trade areas' demographics and psychographics based on zip codes.**

- 3. Perform a GAP analysis on the trade area.**

Discover which retail and restaurant categories are underrepresented and/or oversaturated.

- 4. Using an agglomeration model, determine likely retail, restaurant and service categories.**

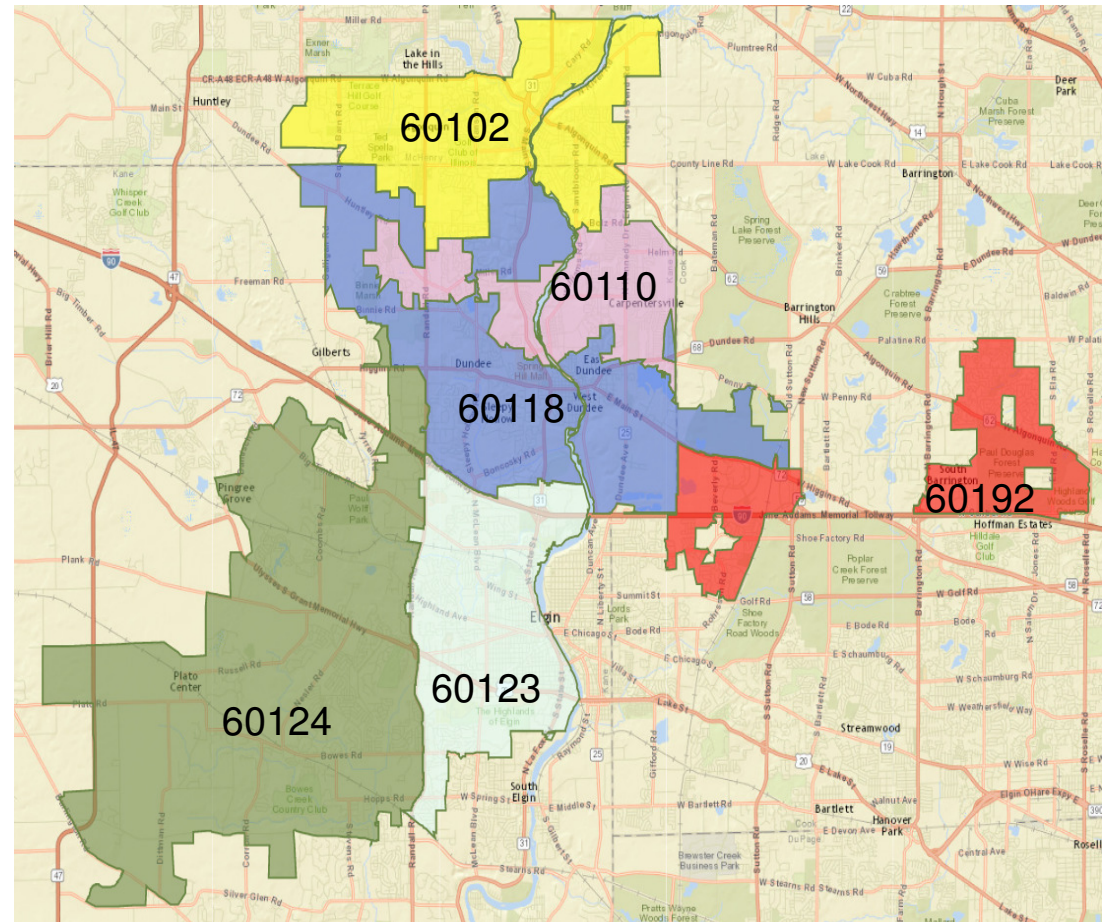
- 5. Research which categories are most likely to be sustained by existing customer demand and/or agglomeration.**

- 6. Identify desirable retailers in selected categories.**

For selected categories determine which retailers are currently operating in the trade area but who do not yet have a location in the primary trade area.

East Dundee Credit Card Based Trade Area

- **East Dundee Credit Card Based Trade Area:**
The trade area has been identified using credit card data to identify the areas where customers are traveling from. This data identifies actual purchase activity of the customers.
- The trade area is a group of six Illinois zip codes that comprise the primary trade area and have the highest percentage of customers travelling to this area. The zip codes are comprised of the following zip codes: 60118, 60110, 60102, 60192, 60120, 60124.
- The multi-colored highlighted areas to the right are highlighted to show each zip code.



GPS Measurement Methodology

The geo-fenced area to the right represents the old Wal-Mart property located at 620 Dundee Avenue. We were able to track visits to this parking lot area even though the site was vacated several months ago. The traffic and parking counts below are for the geo-fenced area. The GPS tracking used the methodology below:

- Includes trips that end at area geo-fenced areas.
- Trips are defined as a continuous flow of location data until a vehicle stops for at least 5 minutes
- Personal vehicles only, commercial traffic is excluded
- The period covered is from Sept. 2015 to Aug. 2016

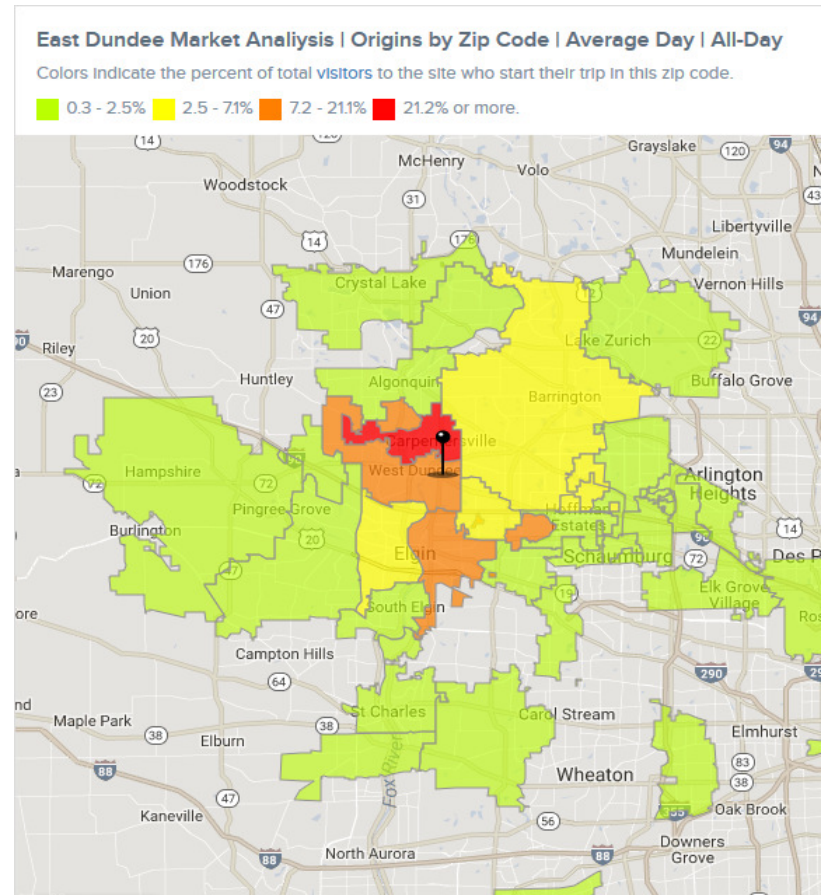
Traffic and Parking Counts

Day Type	Day Part	Parking Activity	Number of Vehicles	Traffic Capture Ratio
Average Day	All-Day	731	34,245	2.00%
Average Weekday	All-Day	660	37,363	2.00%
Average Weekend Day	All-Day	908	26,389	3.00%



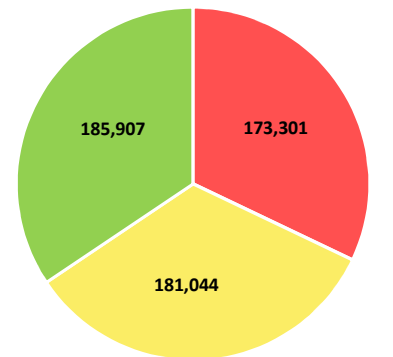
East Dundee Trade Area

- This data identifies actual distance and parking activity of the customers. The GPS trade area differs slightly from the Credit Card based is a group of six Illinois zip codes that have the highest percentage of customers travelling to this area.
- **East Dundee GPS Based Trade Area**- Comprised of the following zip codes: 60118, 60110, 60102, 60192, 60120, 60124, 60123. The red and orange highlighted areas to the right show the primary trade area being Carpentersville.

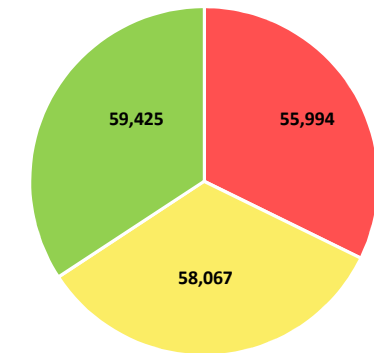


Trade Area Household Demographics

Total Population

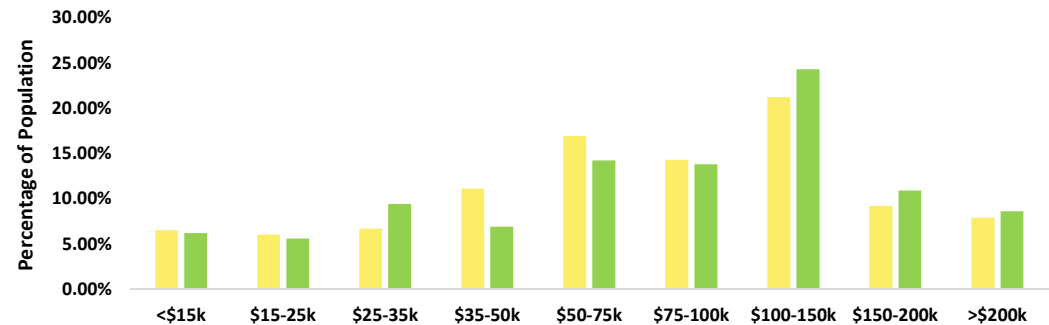


■ 2010 ■ 2016 ■ 2021

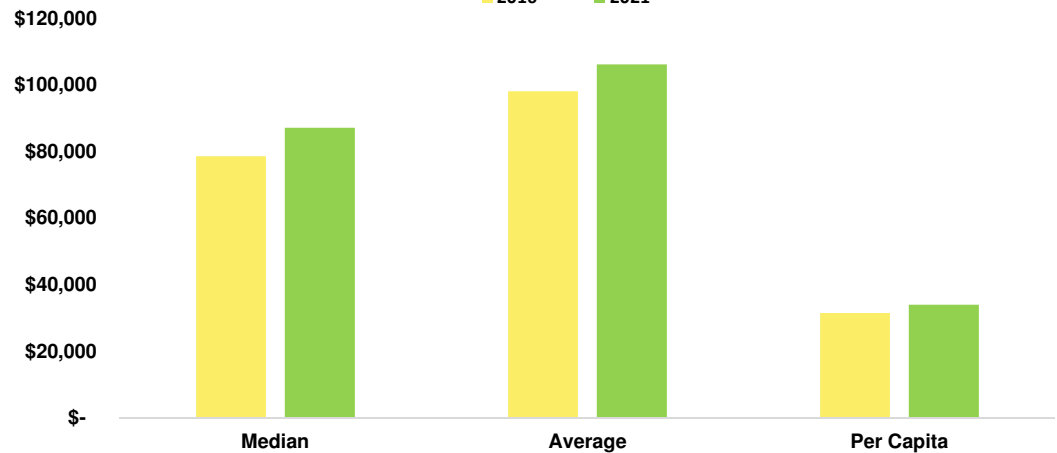


Number of Households

Income Distribution

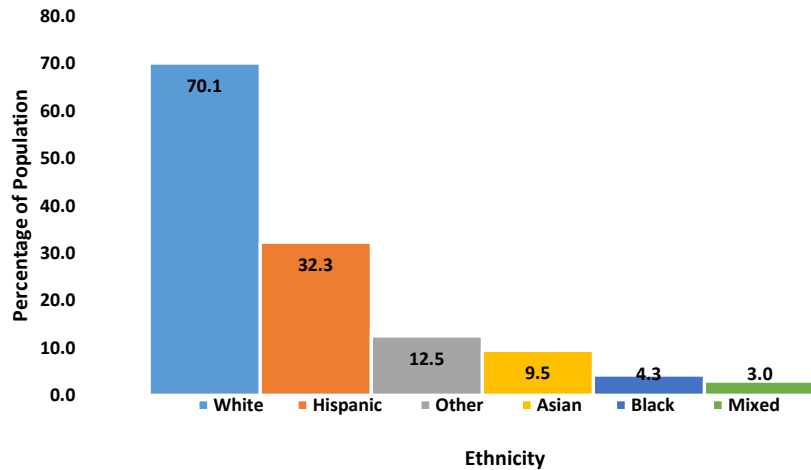


■ 2016 ■ 2021

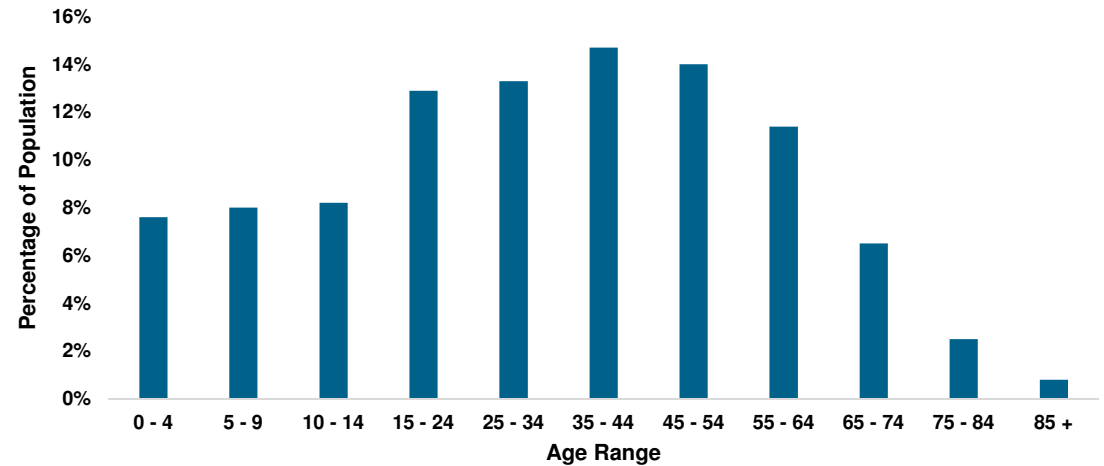


■ 2016 ■ 2021

Trade Area Ethnicity and Age Demographics



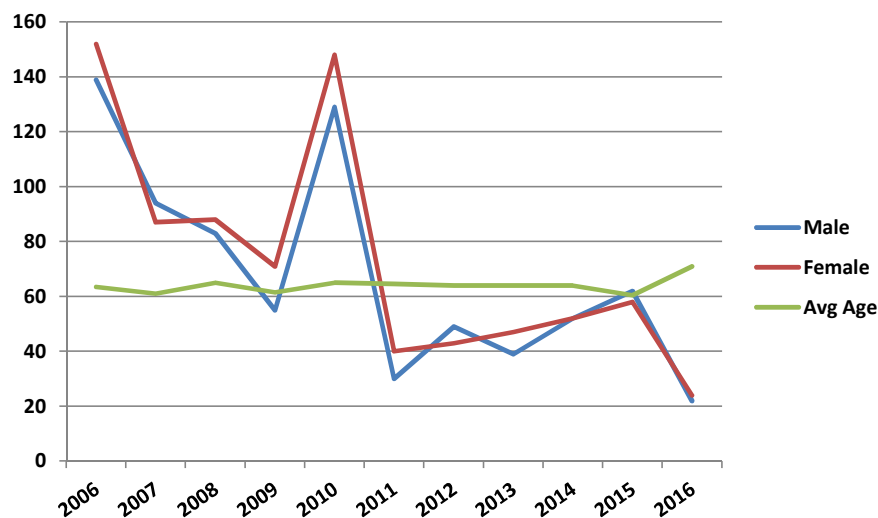
*According to data source “Other” refers to those who belong to some other ethnicity alone.



-Data is for all zip codes in trade area defined on slide 5.

East Dundee 'Move' Data

Move Ins by Age and Gender



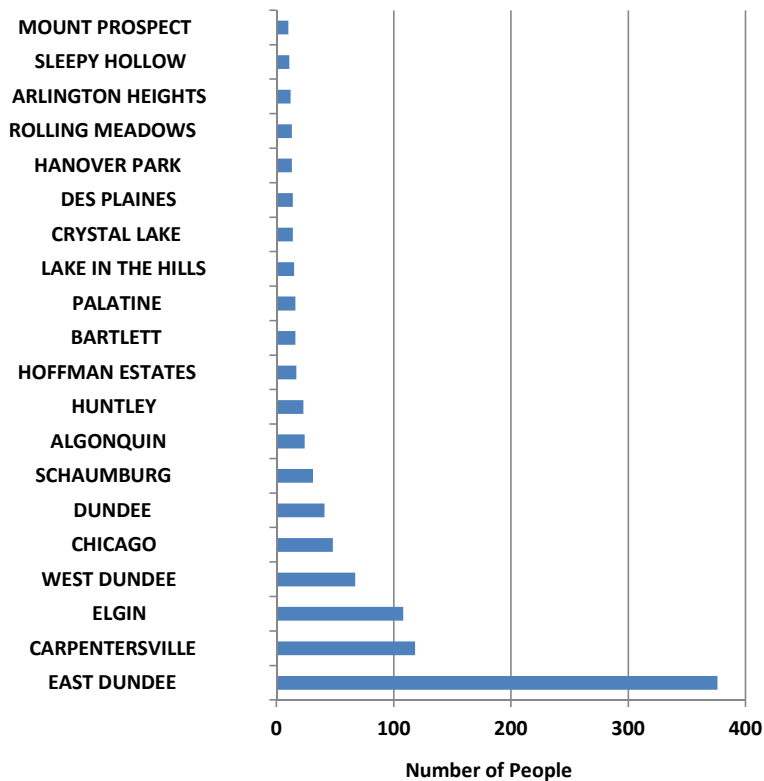
The 'Move' data for East Dundee includes 1,692 records for current residents that have moved in the last 10 years.

- 73% of the residents moved from within Illinois.
- The average age of residents that moved since 2006 is 63.

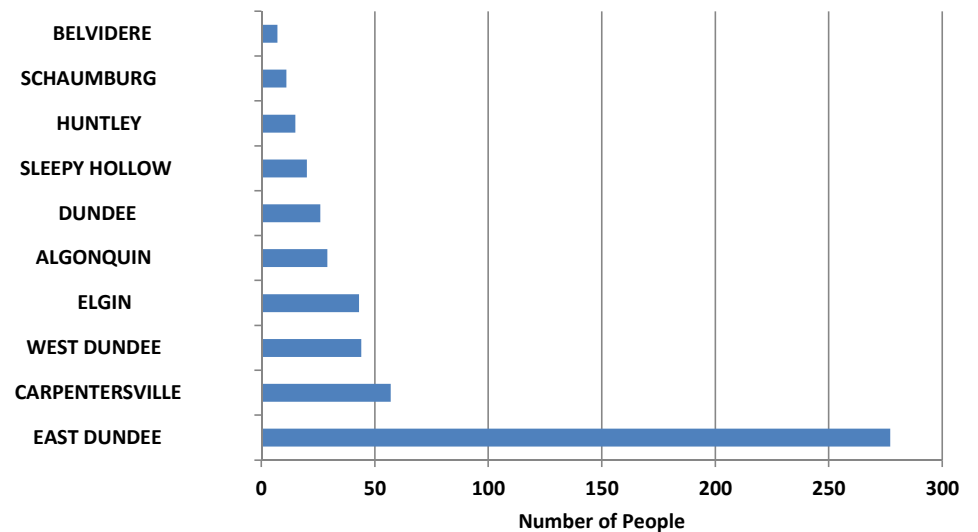
*Data is for the area of East Dundee which is in zip code 60118.

East Dundee 'Move' Data

Top 20 Moved from Cities



Top 10 Moved to Cities Since 2006



Over 30% moved within the village of East Dundee.

Data is for the area of East Dundee which is in zip code 60118.

Tapestry Segmentation Definitions



Soccer Moms - Affluent, family-oriented market with a country flavor. Residents are partial to new housing away from the bustle of the city but close enough to commute to professional job centers. Residents prefer the suburban periphery of metropolitan areas.



Savvy Suburbanites - Residents are well educated, well read, and well capitalized. Families include empty nesters and empty nester wannabes, who still have adult children at home.



Professional Pride - Consumers are well-educated career professionals that have prospered through the Great Recession. To maintain their upscale suburban lifestyles, these goal oriented couples work, often commuting far and working long hours.



Las Casas - Family-oriented market distinguished by multigenerational households. Their spending reflects their children-baby food and furniture or children's apparel-and convenience-fast food and family restaurants.



Barrios Urbanos- More than one in four are foreign born, bringing rich cultural traditions to these neighborhoods in the urban outskirts. Dominating this market are younger families with children or single-parent households with multiple generations living under the same roof.



Enterprising Professionals -Residents are well educated and climbing the ladder in STEM (science, technology, engineering, and mathematics) occupations. They change jobs often and therefore choose to live in condos, town homes, or apartments; many still rent their homes.



Boomburbs- Young professionals with families that have opted to trade up to the newest housing in the suburbs. This is an affluent market but with a higher proportion of mortgages.



Home Improvement -Residences are single-family homes that are owner occupied, with only one-fifth of the households occupied by renters. Education and diversity levels are similar to the US as a whole. These families spend a lot of time on the go and therefore tend to eat out regularly.

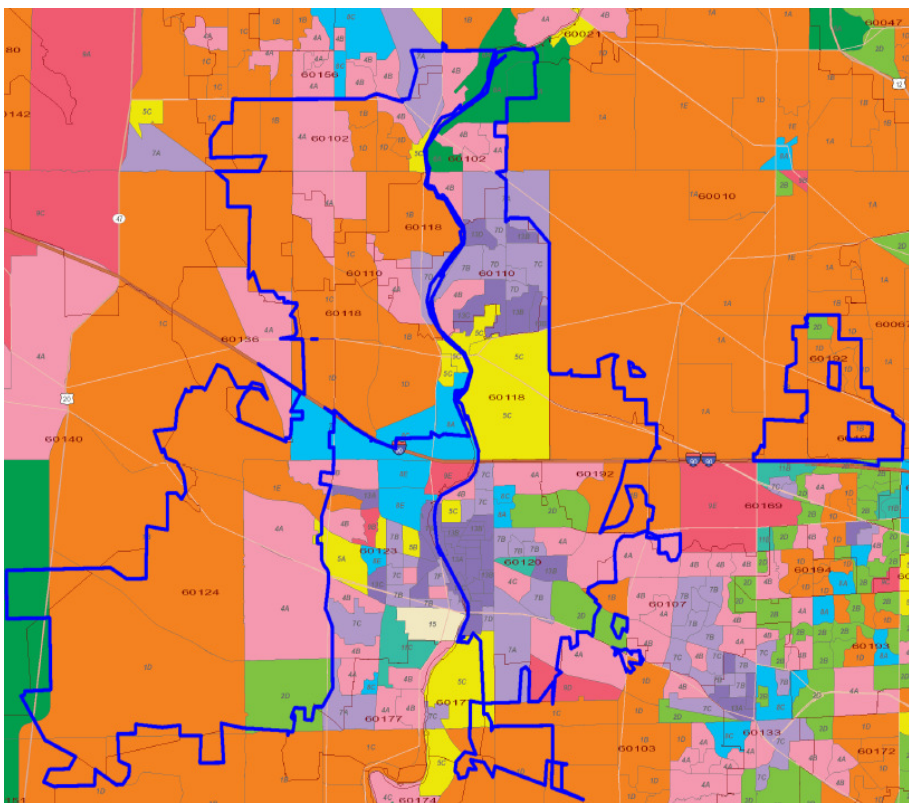


Parks & Recreation- These practical suburbanites have achieved the dream of home ownership. Their homes are older, and town homes and duplexes are not uncommon. Many of these families are two-income married couples approaching retirement age; but do not plan on retiring anytime soon or moving.



Up and Coming Families- Residents are younger and more mobile and ethnically diverse than the previous generation. They are ambitious, working hard to get ahead and willing to take some risks to achieve their goals.

Dominant Tapestry Map



Trade Area

Soccer Moms (4A)	L4	18%
Savvy Suburbanites (1D)	L1	10%
Professional Pride (1B)	L1	10%
Las Casas (13B)	L13	9%
Enterprising Professionals (2D)	L2	7%
Boomburbs (1C)	L1	6%
Home Improvement (4B)	L4	6%
Parks and Rec (5C)	L5	5%
Barrios Urbanos (7D)	L7	4%
Up and Coming Families (7A)	L7	4%

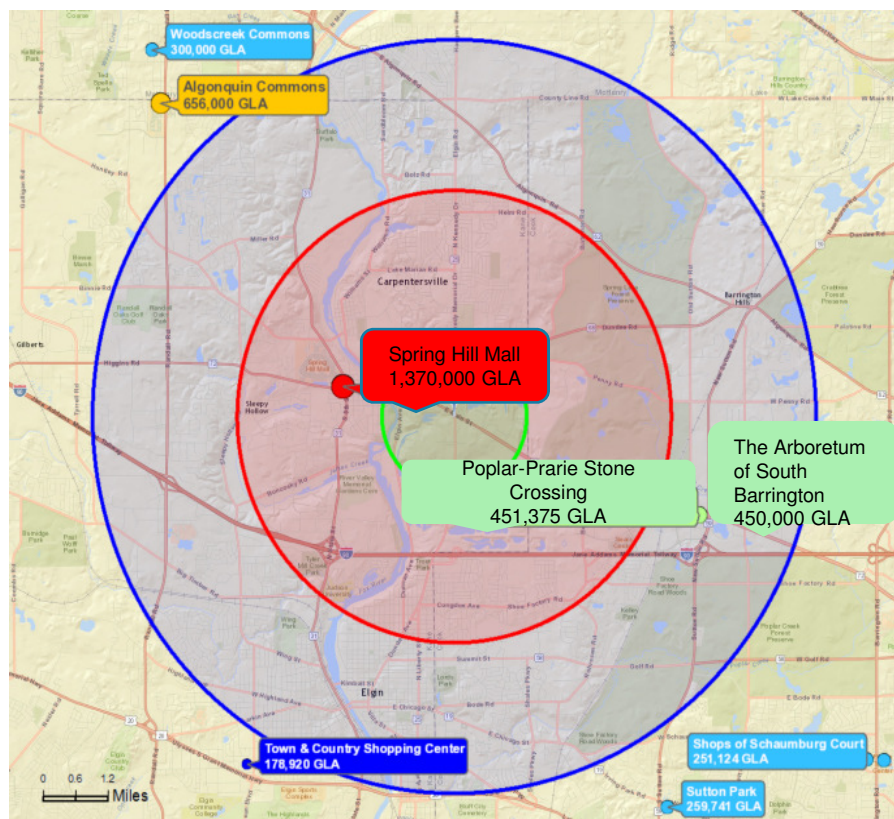
The Tapestry Segmentation system classifies U.S. neighborhoods based on their socioeconomic and demographic composition.

Tapestry LifeMode

- L1: Affluent Estates
- L2: Upscale Avenues
- L3: Uptown Individuals
- L4: Family Landscapes
- L5: GenXurban
- L6: Cozy Country
- L7: Ethnic Enclaves
- L8: Middle Ground
- L9: Senior Styles
- L10: Rustic Outposts
- L11: Midtown Singles
- L12: Hometown
- L13: Next Wave
- L14: Scholars and Patriots

Major Shopping Malls

Malls- within 5 mile radius

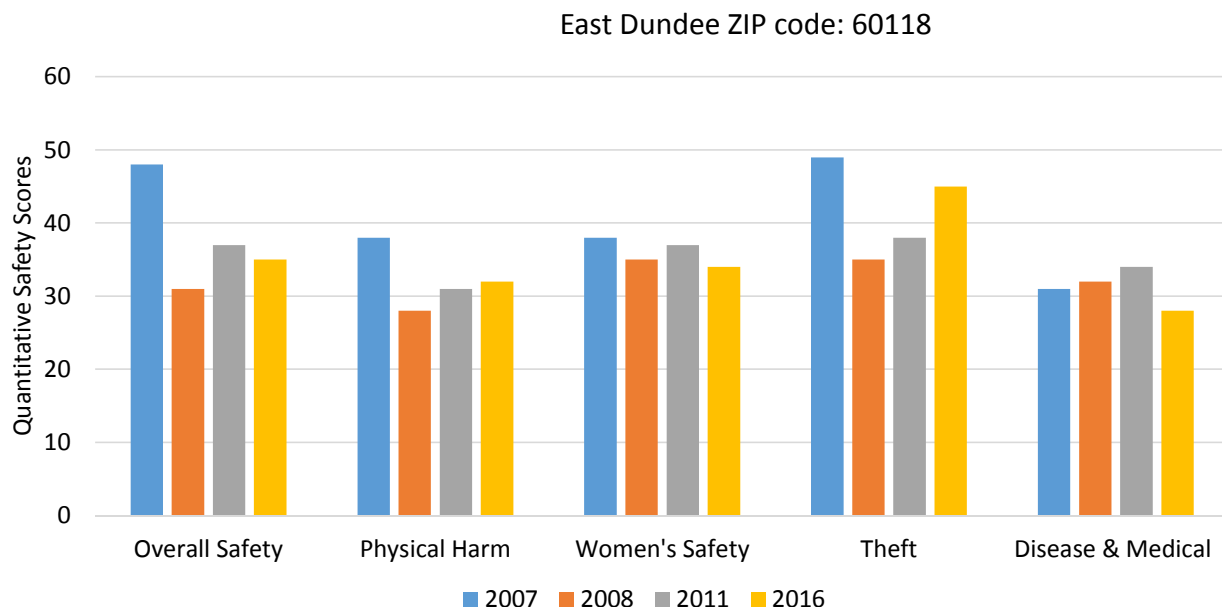


Mall	City	Distance (mi)	Stores	GLA (Sq. Ft.)
Spring Hill Mall	Township of Dundee	2.4 NW	120	1,370,000
Poplar-Prairie Stone Crossing	Hoffman Estates	4.2 SE	38	451,375
The Arboretum of South Barrington	South Barrington	4.3 SE	64	450,000

Anchors

Spring Hill Mall	Macy's, Kohl's, Sears, Cinemark
Poplar-Prairie Stone Crossing	Target, Ross, TJ Maxx
The Arboretum of South Barrington	Iplic Theaters, L.L. Bean, Xsport Fitness

Quantitative Safety Scores



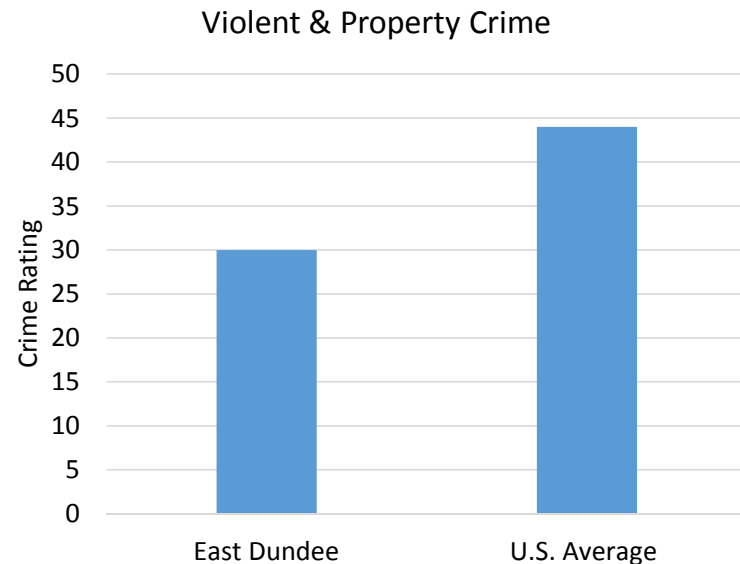
These safety scores take into account a wide array of variables, both explicit structured incidence and prevalence data plus implicit structured and unstructured predictive variables.

The graph above displays the quantitative safety scores and analyzed categories for East Dundee. The lower the score the safer the category is. Over the last decade the village has become safer in every analyzed category with **overall safety increasing by 27%**.

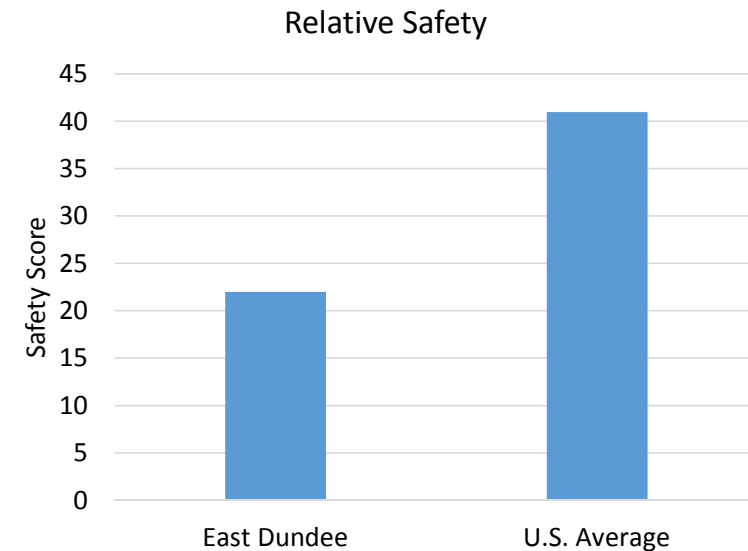
Violent & Property Crime

A proprietary method of scoring relative safety on a scale of 1 – 100 currently rates East Dundee 22 (US average is 41). For property (burglary, larceny-theft, motor vehicle theft, and arson) and violent crime (murder, and non-negligent manslaughter, forcible rape, robbery, aggravated assault) East Dundee would be rated 30 (US average is 44).

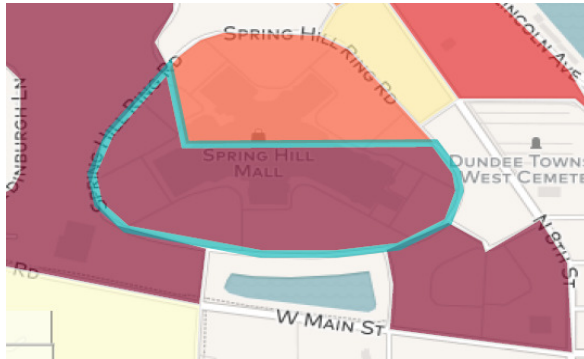
The graphs below indicate that East Dundee had better crime ratings in terms of property crime and violent crimes, with the lower the score the higher the safety rating.



Source: FBI uniform crime reporting

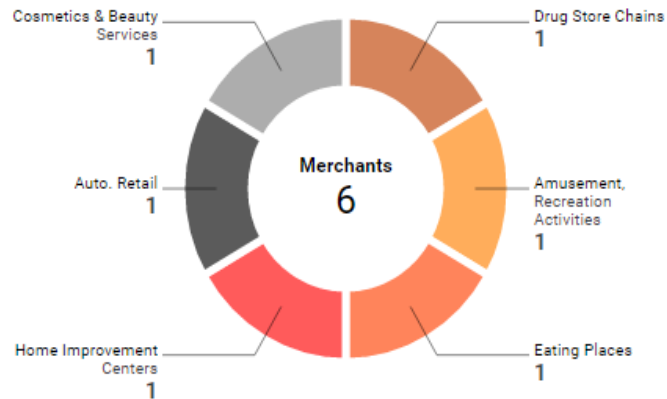


Local Sales Data



The data for the highlighted block in the picture to the left is for the Spring Hill Mall which is 2.5 miles away from 620 Dundee Ave.

MERCHANT CATEGORIES & TOTAL

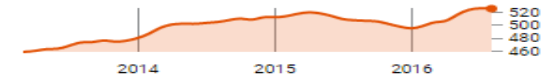


Data source- MasterCard

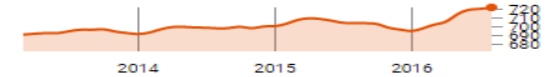
HISTORICAL SCORE TRENDS

View the month by month value of each performance score. Use the performance scores on the left for the report date you have chosen to spot trends on the timeline.

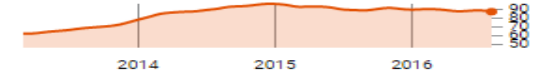
SALES
526



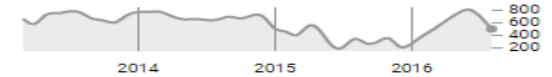
TRANSACTIONS
722



TICKET SIZE
87



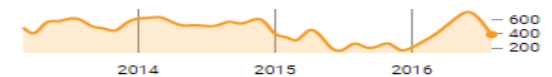
GROWTH
496



STABILITY
63



UPFRONT
386



Local Sales Data



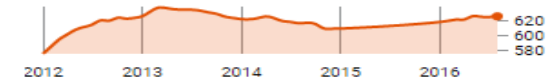
The data for the highlighted block in the picture to the left is for the area of Higgins Road 1 mile away from 620 Dundee Road before the crossing of the Fox River.

HISTORICAL SCORE TRENDS

View the month by month value of each performance score. Use the performance scores on the left for the report date you have chosen to spot trends on the timeline.

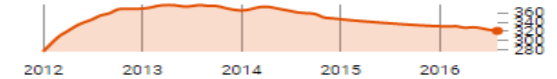
SALES

626



TRANSACTIONS

321



TICKET SIZE

881



GROWTH

592



STABILITY

625

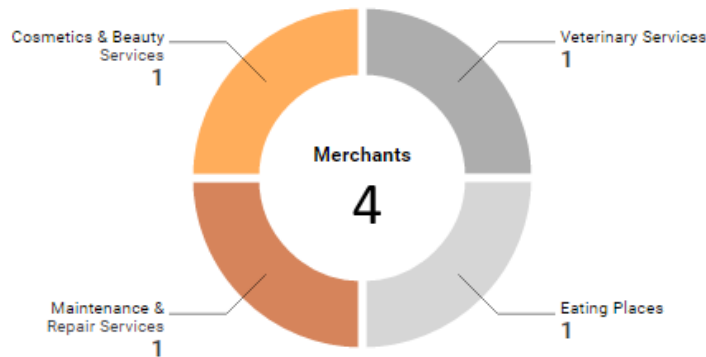


UPFRONT

744

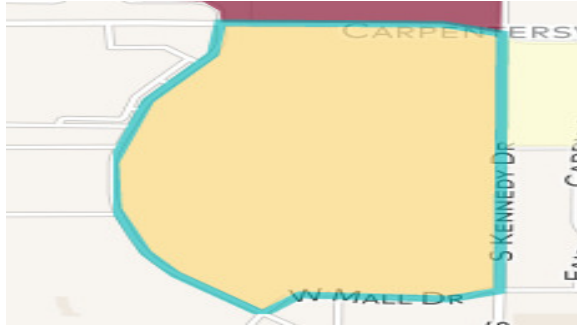


MERCHANT CATEGORIES & TOTAL



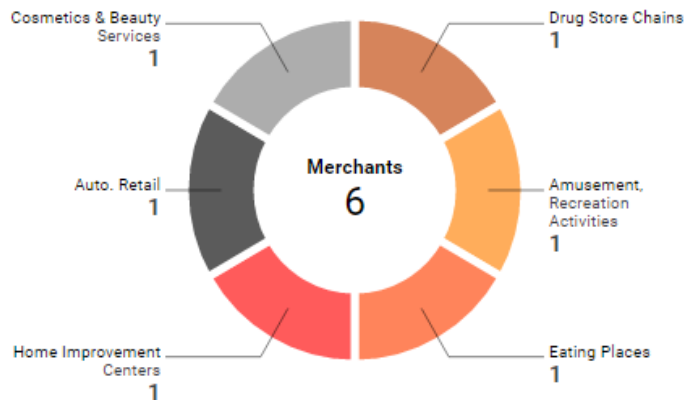
Data source- MasterCard

Local Sales Data



The data for the highlighted block in the picture to the left is from Carpentersville, which credit and sales data indicated a large portion of shoppers of 620 Dundee Ave come from.

MERCHANT CATEGORIES & TOTAL



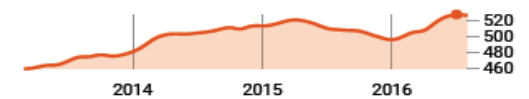
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HISTORICAL SCORE TRENDS

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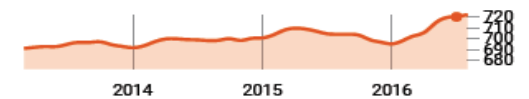
SALES

527



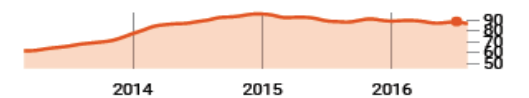
TRANSACTIONS

720



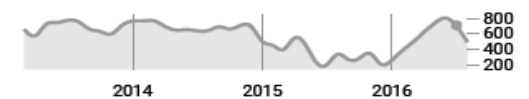
TICKET SIZE

89



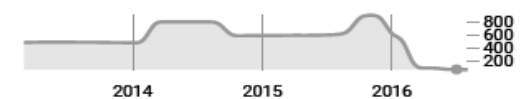
GROWTH

713



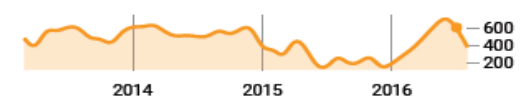
STABILITY

64

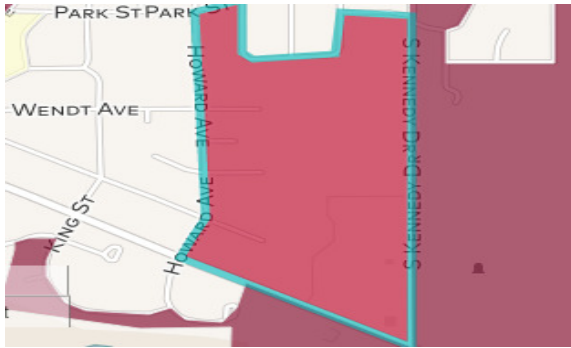


UPFRONT

609



Local Sales Data

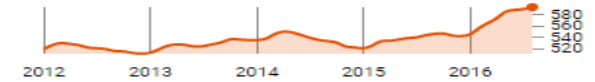


The data for the highlighted block in the picture to the left is located directly across the street from 620 Dundee Avenue on the North side of Higgins Road.

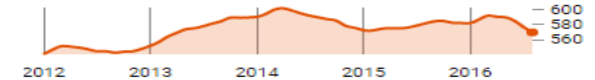
HISTORICAL SCORE TRENDS

View the month by month value of each performance score. Use the performance scores on the left for the report date you have chosen to spot trends on the timeline.

SALES
593



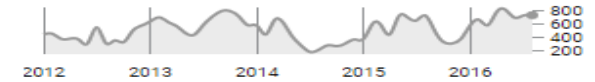
TRANSACTIONS
570



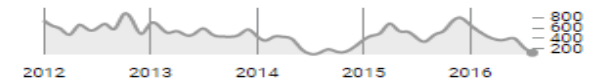
TICKET SIZE
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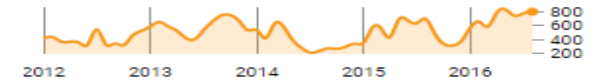
GROWTH
734



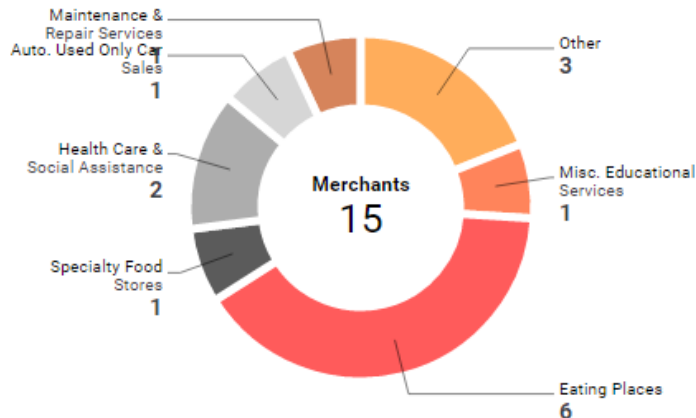
STABILITY
127



UPFRONT
805

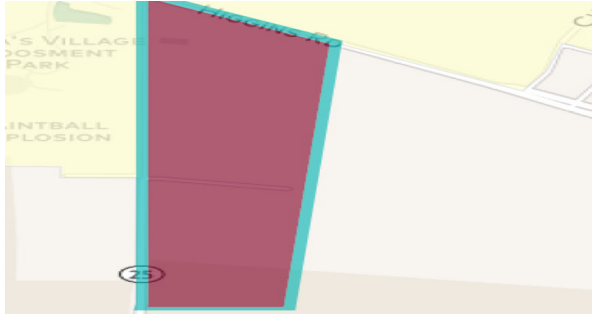


MERCHANT CATEGORIES & TOTAL



Data source- MasterCard

Local Sales Data



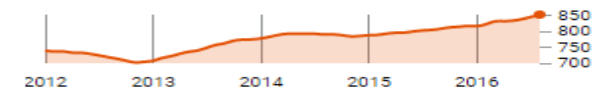
The data for the highlighted block in the picture to the left includes 620 Dundee Avenue property.

HISTORICAL SCORE TRENDS

View the month by month value of each performance score. Use the performance scores on the left for the report date you have chosen to spot trends on the timeline.

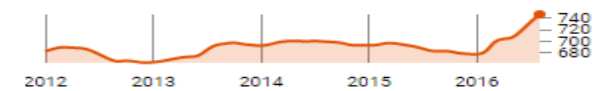
SALES

854



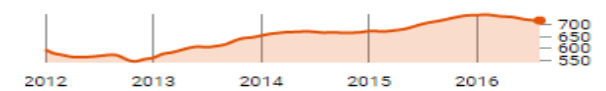
TRANSACTIONS

747



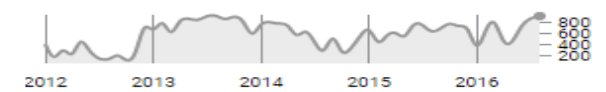
TICKET SIZE

719



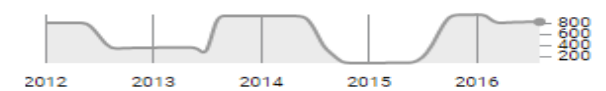
GROWTH

925



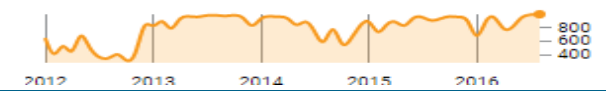
STABILITY

821

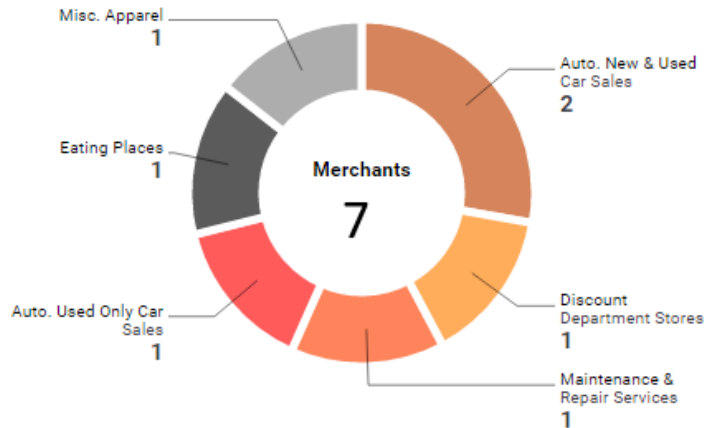


UPFRONT

992



MERCHANT CATEGORIES & TOTAL



Data source- MasterCard

Opportunities

Demand Opportunity

Trade area residents are **LEAVING** their area to spend money in a retail category in another trade area because their demands are unmet within the trade area.

A new business in this category has the opportunity to capture this unmet demand.

On slides 22-34 numbers in green represent retail opportunities for the trade area.

Trade Area Demand Opportunities

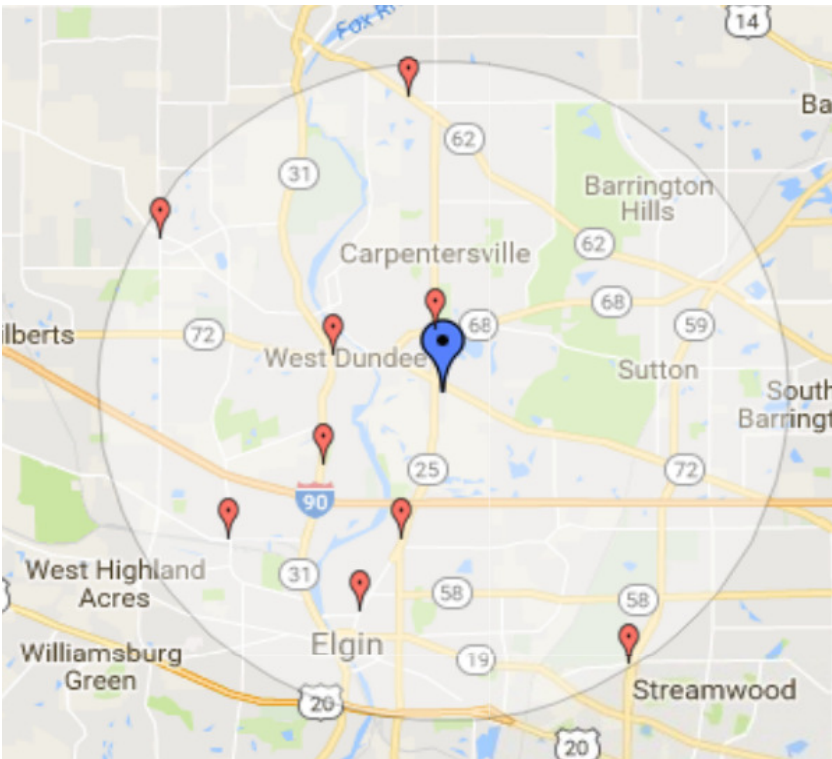
Retail Category	NAICS	Primary	Primary Capture Viability
Gasoline Stations with Convenience Stores	447110	\$91,112,202	1,507.1%
Drinking Places	722	\$89,999,354	23,105%
Full-Service Restaurants	7221	\$58,540,152	6,103.2%
Home Centers	444	\$48,161,713	292.3%
Supermarkets and Grocery Stores	445	\$ 13,891,172	170.5%
Furniture & Home Furnishings Stores	442	\$24,323,684	1,366.8%

“Primary Capture Viability” represents the percentage of the average annual sales per store that would be provided by unmet demand in the primary trade area.

Demand represents spending by shoppers residing in each area, and is therefore not cumulative.

* Although saturation may seem apparent, competition for surrounding restaurants suggests that a non-represented cuisine could succeed in this area.

East Dundee Demand Opportunities



Trade Area Centerpoint: 5 mile radius from 620 Dundee Ave, East Dundee, IL 60118

Retailers in this category currently operating in trade area

Gasoline Stations with Convenience Store

NAICS 447110

Business	Distance
Shell	0.70 mi
Mobil	0.90 mi
Shell	1.00 mi
BP	1.00 mi
Thornton's	1.00 mi
Amstar	1.33 mi

Trade Area	Unmet Demand (Oversupply)
Primary	\$ 91,112,202

There are 9 gas stations in a 5 mile radius with total sales of \$54,410,162.

The Gasoline Stations with Convenience Stores industry within the 5 mile radius given had a total of 9 establishments. The average revenue per establishment was \$6,045,574 in 2015. The average Gross Margin was 9.14% and the average EBITDA for this industry was 0.97% in 2015. The average establishment revenue, from 2013 to 2014, decreased by 2.8%. From 2014 to 2015 it increased by 8.4%.

Trade Area Demand Opportunities

Gasoline Stations with Convenience Stores

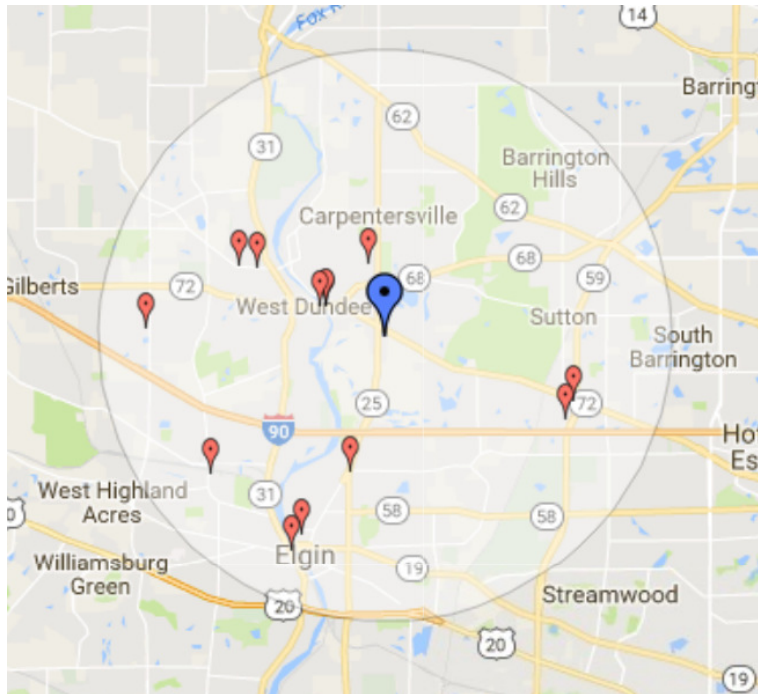
NAICS 447110

Trade Area	Unmet Demand (Oversupply)	Average Sales per Store	Capture Viability
Primary	\$91,112,202	\$6,045,574	1,507.1%

“Capture Viability” represents the percentage of the average sales per store that would be provided by unmet demand.

The average store sales for the trade area of East Dundee.

East Dundee Demand Opportunities



Trade Area Centerpoint: 5 mile radius from 620 Dundee Ave, East Dundee, IL 60118

Retailers in this category currently operating in trade area

Drinking Places

NAICS 722410

Business	Distance
River Lee's	1.15mi
Carol's Corner	1.17 mi
Dylan's Pub	1.25 mi
Skeeter's Saloon	1.29 mi
Hoppes Tavern	2.45 mi
Gaming Cafe	2.54 mi

Trade Area	Unmet Demand (Oversupply)
Primary	\$ 89,999,354

There are 13 drinking places in a 5 mile radius with total sales of \$5,063,647.

The Drinking Places industry within the 5 mile radius given had a total of 13 establishments. The average revenue per establishment was \$389,511 in 2015. The average Gross Margin was 59.49% and the average EBITDA for this industry was 0.97% in 2015. The average establishment revenue, from 2013 to 2014, decreased by 8.82%. From 2014 to 2015 it increased by 13.9%.

Trade Area Demand Opportunities

Drinking Places

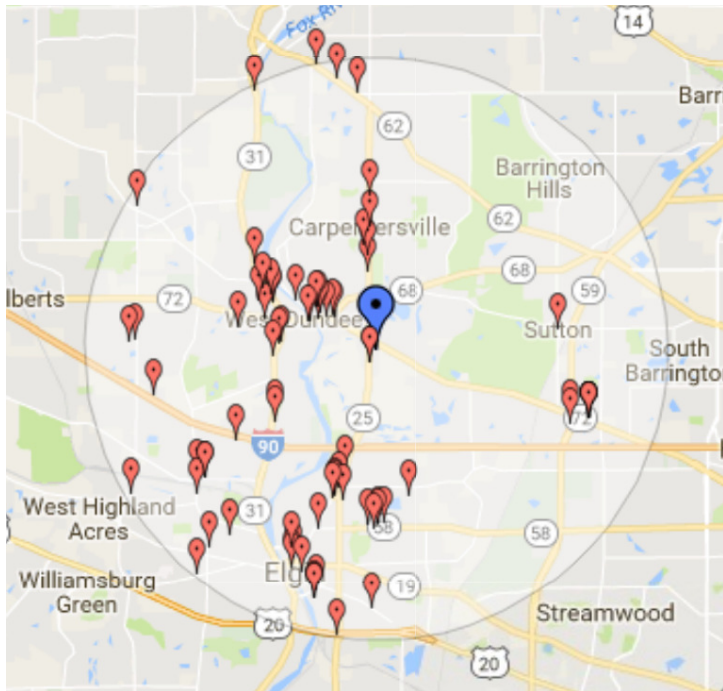
NAICS 722410

Trade Area	Unmet Demand (Oversupply)	Average Sales per Store	Capture Viability
Primary	\$ 89,999,354	\$389,511	23,105.7%

“Capture Viability” represents the percentage of the average sales per store that would be provided by unmet demand.

The average store sales for the trade area of East Dundee.

East Dundee Demand Opportunities



Trade Area Centerpoint: 5 mile radius from 620 Dundee Ave, East Dundee, IL 60118

Retailers in this category currently operating in trade area

Full-Service Restaurants

NAICS 722410

Business	Distance
Dundee Manor Restaurant	0.92 mi
El Faro Restaurant	1.05 mi
Alianos Ristorante	1.24 mi
Bandito Barney's	1.25 mi
Diamond Jim's Gas Grill	1.40 mi
Rosie O'Hare's Public House	1.70 mi

Trade Area	Unmet Demand (Oversupply)
Primary	\$ 58,540,152

There are 81 full-service restaurants within a 5 mile radius with total sales of \$77,692,230.

The Full-Service Restaurants industry within the 5 mile radius given had a total of 81 establishments. The average revenue per establishment was \$959,163 in 2015. The average Gross Margin was 56.77% and the average EBITDA for this industry was 5.77% in 2015. The average establishment revenue, from 2013 to 2014, decreased by 7.1%. From 2014 to 2015 it increased by 2.7%.

Trade Area Demand Opportunities

Full-Service Restaurants

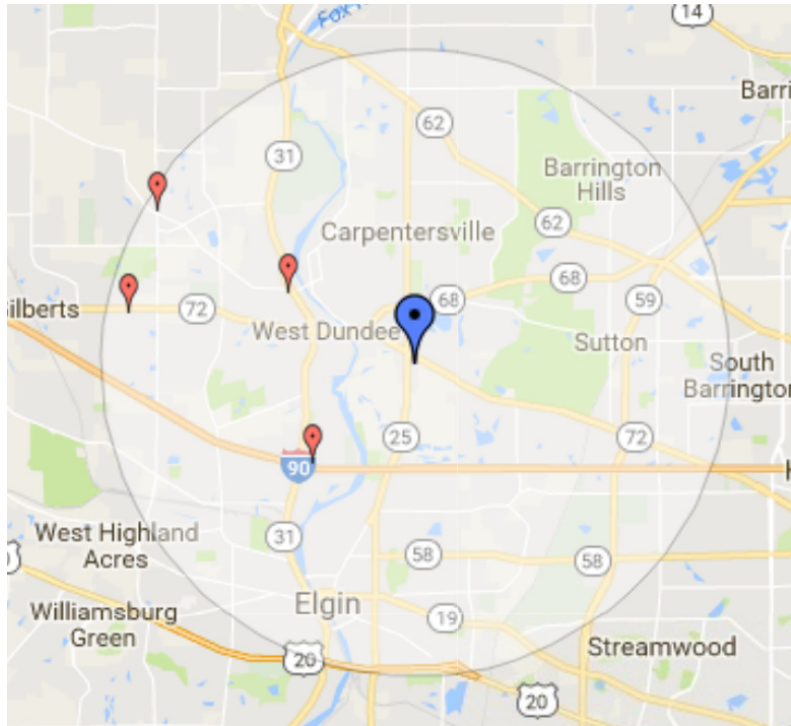
NAICS 722410

Trade Area	Unmet Demand (Oversupply)	Average Sales per Store	Capture Viability
Primary	\$58,540,152.00	\$959,163	6,103.2%

“Capture Viability” represents the percentage of the average sales per store that would be provided by unmet demand.

The average store sales for the trade area of East Dundee.

East Dundee Demand Opportunities



Trade Area Centerpoint: 5 mile radius from 620 Dundee Ave, East Dundee, IL 60118

Retailers in this category currently operating in trade area

Home Centers

NAICS 444110

Business	Distance
Tractor Supply Co.	1.70 mi
Home Depot	2.33 mi
Menards	4.78 mi

Trade Area	Unmet Demand (Oversupply)
Primary	\$48,161,713

There are 6 home centers in a 5 mile radius with total sales of \$82,377,656.

The Home Centers industry within the 5 mile radius given had a total of 6 establishments. The average revenue per establishment was \$16,475,531 in 2015. The average Gross Margin was 56.77% and the average EBITDA for this industry was 5.77% in 2015. The average establishment revenue, from 2013 to 2014, decreased by 7.1%. From 2014 to 2015 it increased by 2.7%.

Trade Area Demand Opportunities

Home Centers

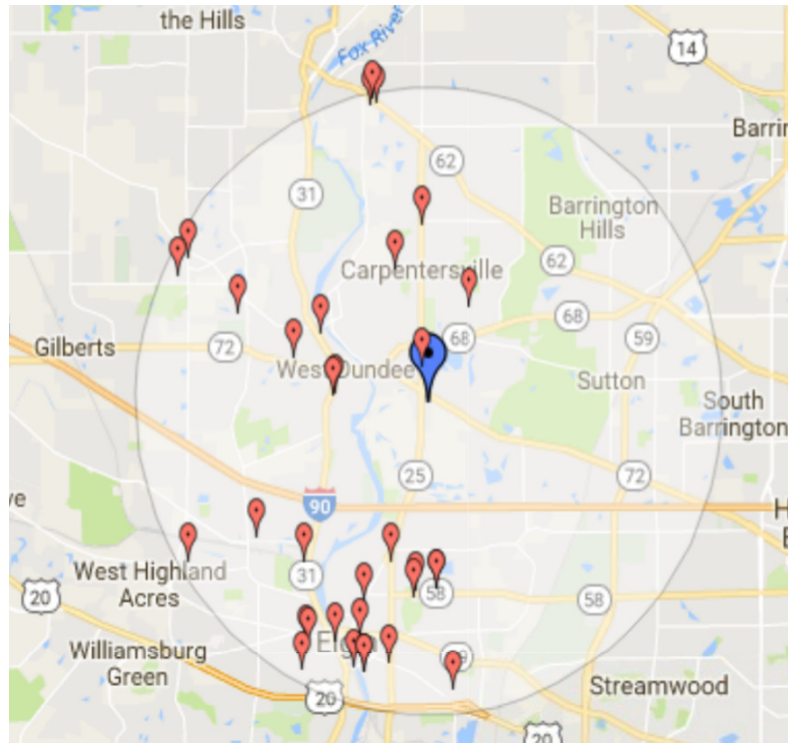
NAICS 444110

Trade Area	Unmet Demand (Oversupply)	Average Sales per Store	Capture Viability
Primary	\$48,161,713.00	\$16,475,531	292.3%

“Capture Viability” represents the percentage of the average sales per store that would be provided by unmet demand.

The average store sales for the trade area of East Dundee.

East Dundee Demand Opportunities



Trade Area Centerpoint: 5 mile radius from 620 Dundee Ave, East Dundee, IL 60118

Retailers in this category currently operating in trade area

Supermarkets & Grocery Stores

NAICS 445110

Business	Distance
Discount Grocery Outlet	3.80 mi
Aldi Carpentersville	4.80 mi
Village Fresh Market	4.50 mi
Walmart Supercenter	4.70 mi
Jewel-Osco	5.50 mi

Trade Area	Unmet Demand (Oversupply)
Primary	\$13,891,172

There are 33 supermarket and grocery stores in a 5 mile radius with total sales of \$268,905,813.

The Supermarkets and Grocery Stores industry within the 5 mile radius given had a total of 33 establishments. The average revenue per establishment was \$8,148,661 in 2015. The average Gross Margin was 31.5% and the average EBITDA for this industry was 1.31% in 2015. The average establishment revenue, from 2013 to 2014, increased by 9.4%. From 2014 to 2015 it increased by 12.5%.

Trade Area Demand Opportunities

Supermarkets & Grocery Stores

NAICS 445299

Trade Area	Unmet Demand (Oversupply)	Average Sales per Store	Capture Viability
Primary	\$13,891,172	\$8,148,661	170.5%

“Capture Viability” represents the percentage of the average sales per store that would be provided by unmet demand.

The average store sales for the trade area of East Dundee.

Trade Area Demand Opportunities

Furniture & Home Furnishings Stores

NAICS 445299

Business	Distance
Arhaus Furniture	6.40 mi
Ashley Home Store	8.80 mi
Pottery Barn	8.81 mi
Kirkland's	10.2 mi
IKEA Schaumburg	14.9 mi

Trade Area	Unmet Demand (Oversupply)
Primary	\$24,323,684

There are 10 furniture & home furnishings stores in a 5 mile radius with total sales of \$19,574,378.

The Furniture & Home Furnishings Stores industry within the 5 mile radius given had a total of 10 establishments. The average revenue per establishment was \$1,779,489 in 2015. The average Gross Margin was 40.25% and the average EBITDA for this industry was 5.83% in 2015. The average establishment revenue, from 2013 to 2014, decreased by 13.3%. From 2014 to 2015 it increased by 7.1%.

Trade Area Centerpoint: 5 mile radius from 620 Dundee Ave, East Dundee, IL 60118

Retailers in this category currently operating in trade area

Trade Area Demand Opportunities

Furniture & Home Furnishings Stores

NAICS 445299

Trade Area	Unmet Demand (Oversupply)	Average Sales per Store	Capture Viability
Primary	\$24,323,684	\$1,779,489	1,366.8%

“Capture Viability” represents the percentage of the average sales per store that would be provided by unmet demand.

The average store sales for the trade area of East Dundee.

Oversupplied Barriers

These retail categories show no unmet demand in the trade area.

Retail Category	NAICS	Primary
Miscellaneous Store Retailers	453	\$(29,261,679)
Other Miscellaneous Store Retailers	4539	\$(16,638,213)
Office Supplies, Stationery & Gift Stores	4532	\$(13,366,529)
Clothing Stores	4481	\$(11,892,595)
Clothing & Clothing Accessories Stores	448	\$(10,470,163)
Health & Personal Care Stores	446,4461	\$(6,626,193)

Tenant Candidates

The following chain retailers may be looking to expand in 2017, with the retail opportunities data on slide 21 these retailers are candidates to meet the unmet demand in their respective retail category.

Retail Category	Tenant	Min Sq Ft	Max Sq Ft	Summary of Expansion
Furniture/Furnishings	Carpet Garage	16,000	21,000	Midwest
Furniture/Furnishings	Furniture Outlets USA	35,000	160,000	Midwest
Furniture/Furnishings	HOM Furniture	50,000	100,000	Midwest
Gas Stations	Casey's General Store	3,000	3,500	Midwest
Gas Stations	County Market Express	2,000	4,500	Midwest
Gas Stations	United Dairy Farmers Stores	3,600	4,000	Midwest
Hardware	JC Licht	2,500	5,000	IL, WI
Restaurant Family	Mission BBQ	3,000	4,000	IL
Restaurant Family	Nando's Peri-Peri	3,000	3,500	IL
Restaurant Family	ShopHouse Asian Kitchen	2,500	3,000	IL
Restaurant Family	Taco Mayo	1,600	2,600	IL
Restaurant Family	Bandanas Bar-B-Que	4,000	5,500	Midwest
Restaurant Family	Happy Joe's Pizza & Ice Cream Parlors	1,500	4,500	Midwest
Restaurant w/Liquor	Lou Malnati's	1,400	7,000	IL
Restaurant w/Liquor	Bagger Dave's	4,000	4,500	Midwest
Restaurant w/Liquor	Carlos O'Kelly's Mexican Cafe	5,200	6,500	Midwest
Restaurant w/Liquor	Green Mill	5,500	6,500	Midwest
Restaurant w/Liquor	Pepe's Mexican Restaurant	3,000	3,000	Midwest
Restaurant/Food/Beverage Specialty	Binny's Beverage Depot	20,000	30,000	IL
Restaurant/Food/Beverage Specialty	Cousins Subs	,600	2,200	IL
Restaurant/Food/Beverage Specialty	Hale & Hearty	1,800	2,300	IL
Restaurant/Food/Beverage Specialty	Oberweis Dairy	2,800	3,000	IL
Restaurant/Food/Beverage Specialty	Freshii	,500	1,500	IL, NC
Supermarket/Grocery Store	Coborn's	35,000	45,000	Midwest
Supermarket/Grocery Store	County Market	25,000	60,000	Midwest
Supermarket/Grocery Store	Cub Foods	25,000	60,000	IL
Supermarket/Grocery Store	Cermak Fresh Market	65,000	100,000	IL