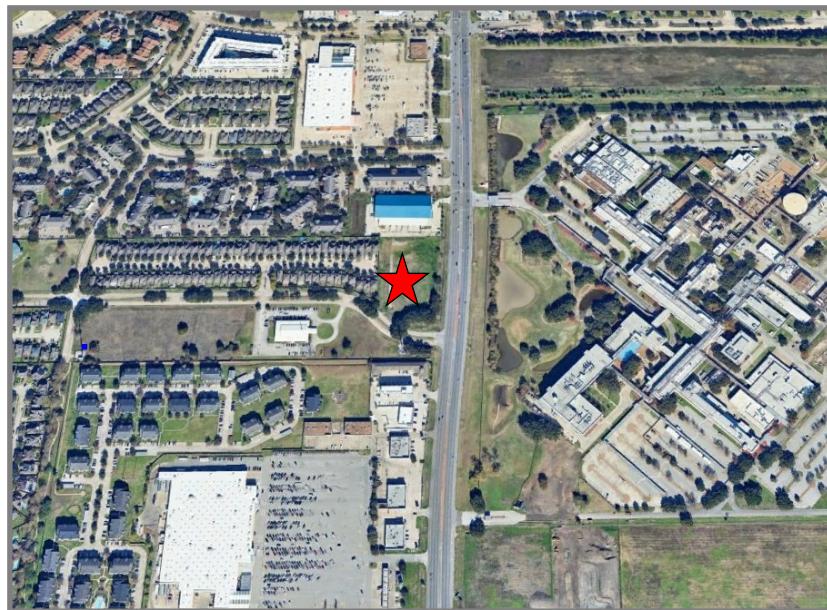


Retail Site Analysis



Kroozin



State Highway 6 and Branch Forest Drive
Houston, Texas 77082



Project Summary

The site is located at the intersection of State Highway 6 and Branch Forest Drive in Houston, Texas 77082. It has been proposed to develop a new generation Kroozin Market with private brand fuel, expanded fuel capacity, large format store with integrated fast food deli, co-brand Tier II fast food restaurant with drive-thru, conveyor tunnel car wash, washateria, and complimentary retail center. The site land area consists of 3.5-acres and affords direct frontage and access along State Highway 6 and Branch Forest Drive.

The focus of this evaluation is the anticipated fuel volume, convenience store, fast food, car wash, and washateria sales during the first three years of planned facility operation. A comprehensive development strategy has been created and analyzed for volume and sales projection purposes. Multiple retail and commercial activity generators are located along State Highway 6. Site traffic exceeds 70,000 vehicles per day. Projections are driven by southbound traffic capture and supported by local residents, employees, and shoppers. Performance will be driven by competitive fuel pricing, which will match direct market leaders. Projections are restricted by traffic intensity and lack of regulation. Habitual southbound commuters, residents, and local employees will find the proposed facility a convenient stopping point with high capacity, multiple services, and competitive pricing.

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Site Overview

State Highway 6 and Branch Forest Drive, Houston, Texas 77082

Intersection

NW

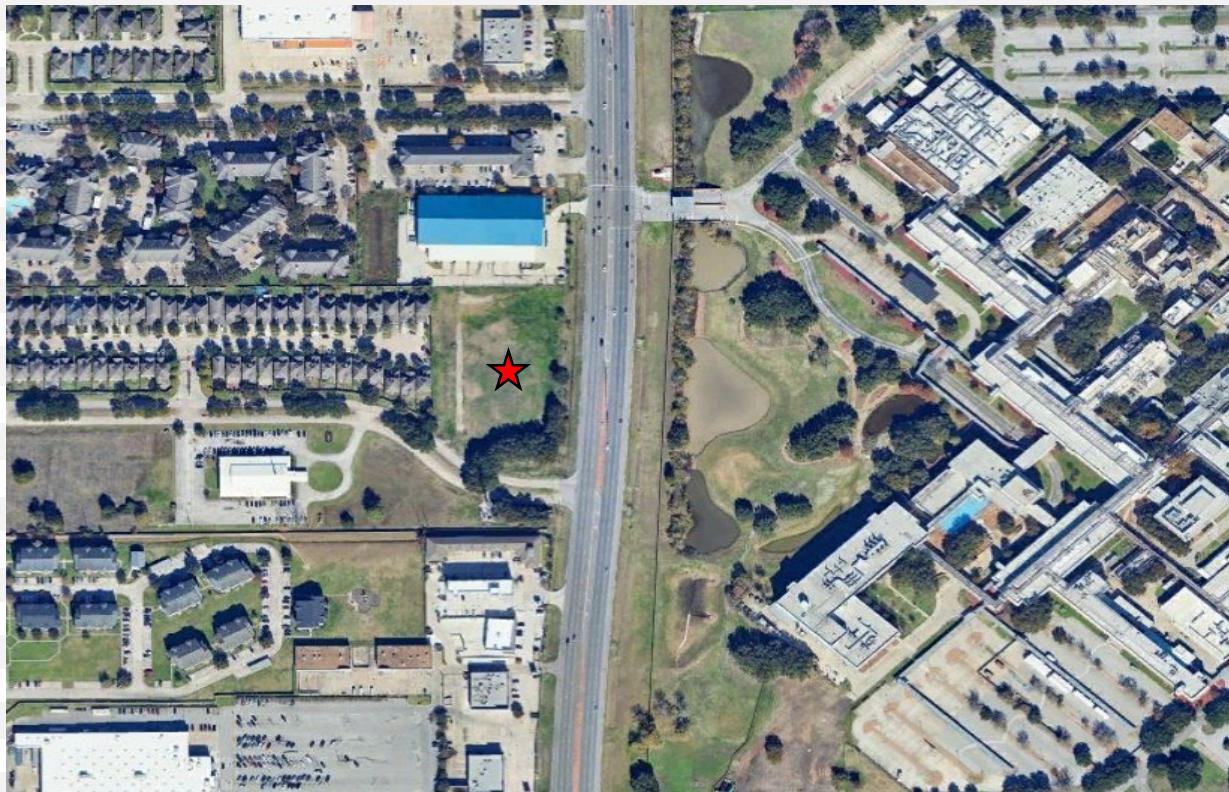
Density Class and Socio-Economic Score

Light Urban



	Lane Count	Direction	Ingress/Egress	Visibility	Stacking
--	------------	-----------	----------------	------------	----------

State Highway 6	6	north/south crossover	1	45 MPH	unregulated
Branch Forest Drive	4	east/west divided	2	30 MPH	stop



Demand Index

Light Urban Density Class

145

Traffic

249

Household

91

Employee

95

HH Change

2

233

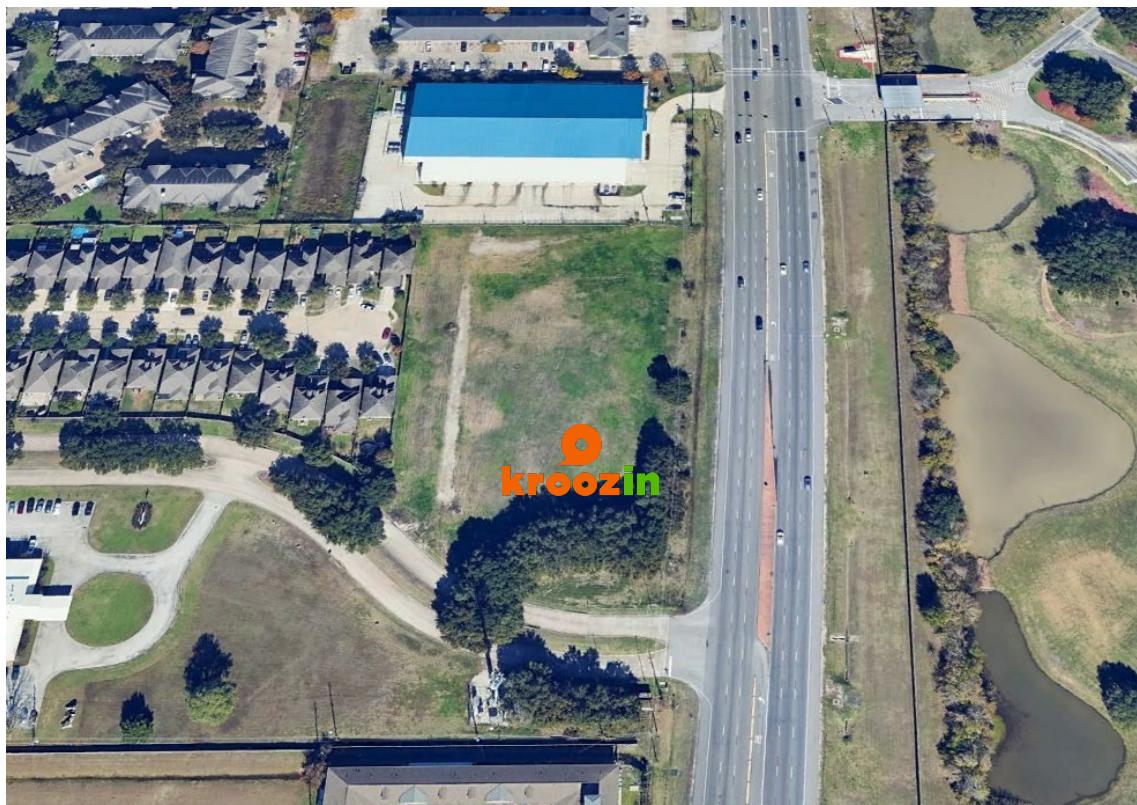
Competitive Index

Facility Development Strategy: Fuel and Convenience Store

Name:	Kroozin Market	Brand:	Kroozin	Case #:	1	
Location:	State Highway 6 and Branch Forest Drive			Intersection:	NW	
Type:	Convenience Store			Fx Impact Score:	282.4	

Forecourt and Exterior			Posted Prices		
12	MPD's	x	Canopy	Unleaded	\$2.46 9
	Electronic	x	Air		
24	# of Gasoline Hoses	6	Brand Sign Facings	Diesel	\$2.87 9
3	# of Gasoline Grades	2	Price Sign Facings	Cash/Card Price	
24	# of Gasoline Fueling Positions	x	LED Price Sign	Unleaded	\$2.36 9
24	# of Diesel Fueling Positions	3	# of Access Points	Diesel	\$2.77 9
	# of Truck Diesel Lanes	Interior	Visibility	Strategy	-0.16 Unleaded
	Non-Ethanol	Unregulated	Traffic Regulation		-0.04 Diesel
	E-85	Crossover	Road Configuration	Competitive Impact	
	EV Stations	Standard	On Site Movement	Gasoline Score	125.5
48	# of Self Service Hoses	45	Posted Speed	Diesel Score	31.5
	# of Full Service Hoses	6,000	Size of Store	Convenience Store Score	117.5
Stacked	Fuel Configuration	14	Up Front Parking	Fast Food Score	65.0
Conveyor	Car Wash		Truck Parking		

Convenience Store						
27	Walk In Cooler Doors	Chain	Maintenance	Expanded	Restrooms	
2	Reach In Cooler Doors	Chain	Interior Lighting	Chain	Snack Merchandising	
Chain	Beverage Merchandising	Chain	Interior Signage	Chain	Tobacco Merchandising	
7	Freezer Doors	x	Fountain Beverage	24	Hours of Operation	
12	Beer/Wine Doors	x	Coffee Bar	3	Cashier Stations	
x	Beer Cave	Tier II Co-Brand	Fast Food Brand	x	Lottery	
Chain	Operation	Taco/Deli	Fast Food	x	ATM	



Projections, Analytical Range, and Metrics

State Highway 6 and Branch Forest Drive, Houston, Texas 77082

AVERAGE MONTHLY VOLUME AND SALES

	Year 1	Year 2	Year 3
Fuel Volume (Gallons)	156,116	158,923	160,956
Gasoline Volume (Gallons)	143,148	145,722	147,586
Diesel Volume (Gallons)	12,968	13,201	13,370
Convenience Store Sales (Dollars)	\$191,888	\$195,338	\$197,837
Convenience Sales (Dollars)	\$170,020	\$173,077	\$175,291
Fast Food Sales (Dollars)	\$21,868	\$22,261	\$22,546

ANALYTICAL VOLUME AND SALES RANGE

LOW	Year 1	Year 2	Year 3
Fuel Volume (Gallons)	140,375	142,965	144,860
Gasoline Volume (Gallons)	128,833	131,150	132,827
Diesel Volume (Gallons)	11,542	11,815	12,033
Convenience Store Sales (Dollars)	\$171,327	\$174,297	\$176,300
Convenience Sales (Dollars)	\$151,318	\$154,039	\$156,009
Fast Food Sales (Dollars)	\$20,009	\$20,258	\$20,291

HIGH

HIGH	Year 1	Year 2	Year 3
Fuel Volume (Gallons)	164,440	167,463	169,672
Gasoline Volume (Gallons)	150,305	153,008	154,965
Diesel Volume (Gallons)	14,135	14,455	14,707
Convenience Store Sales (Dollars)	\$209,705	\$213,364	\$215,868
Convenience Sales (Dollars)	\$185,322	\$188,654	\$191,067
Fast Food Sales (Dollars)	\$24,383	\$24,710	\$24,801

PROJECTION METRICS

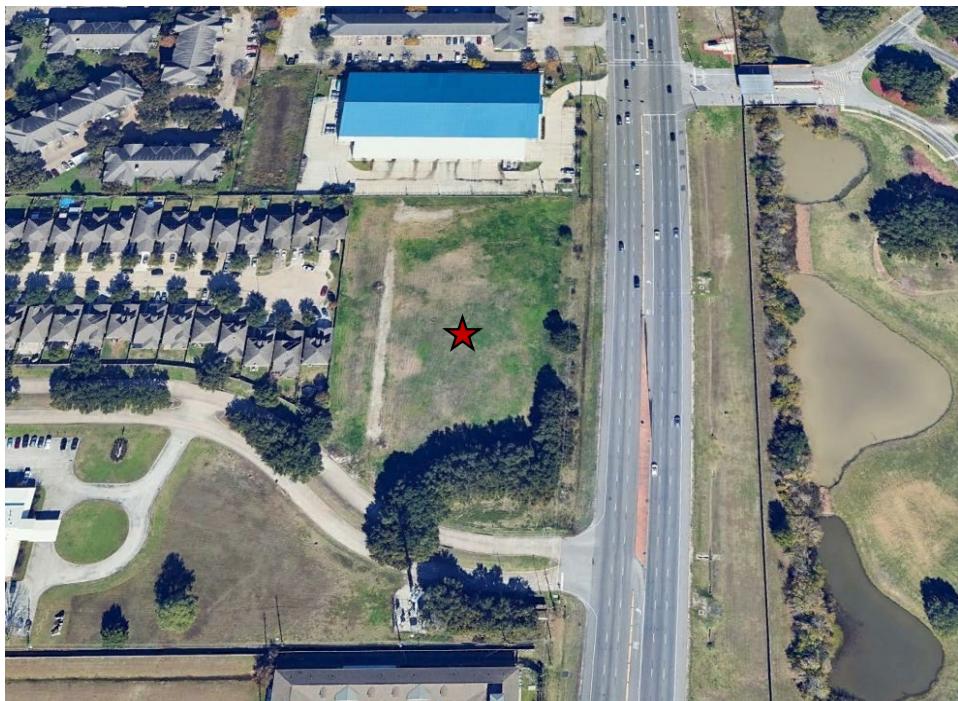
Primary Area of Influence	Custom	Annual Convenience Store Sales Year 1	\$2,302,656
Area in Square Miles	2.62	Annual Convenience Sales Year 1	\$2,040,240
Total Intersection Traffic VPD	73,335	Annual Fast Food Sales Year 1	\$262,416
Explained Intersection Traffic	42.9%	Convenience Store \$ per Square Foot	\$31.98
Passing Intersection Traffic	57.1%	Fast Food Sales Percent Year 1	11.4%
Annual Fuel Volume Year 1	1,873,392		
Annual Gasoline Volume Year 1	1,717,776		
Annual Diesel Volume Year 1	155,616	Fuel Dispenser Count	12
Fuel Gallons per Dispenser Year 1	13,010	Convenience Store Square Feet	6,000

Facility Development Strategy: Fast Food

Name:	Tier II Brand	Operation:	Franchise	Case #:	1	
Location:	State Highway 6 and Branch Forest Drive		Intersection:	NW		
Type:	QSR - TBD					

Fast Food Exterior				Competitive Fast Food Impact	
1,500	Fast Food Restaurant SF	3	# of Access Points	Fast Food Score	61.7
Tier II Brand	Brand Recognition	Interior	Visibility	Brand Score	16
5	Brand Sign Facings	Unregulated	Traffic Regulation		
Standard	Brand Image Compliance	Crossover	Road Configuration		
32	Parking	Cobrand	On Site Movement		
Yes	Drive-Thru Service	45	Posted Speed		
Cobrand	QSR Building Type				

Fast Food Interior					
2	Order Stations	Brand	Interior Maintenance	Standard	Fountain Beverage Service
30	Interior Seats	Brand	Interior Lighting		Coffee Service
Partial	Menu Dayparts	Brand	Interior Signage	Expanded	Restrooms
No	24 Hours	x	Uniforms	x	Delivery



Projections, Analytical Range, and Metrics

State Highway 6 and Branch Forest Drive, Houston, Texas 77082

AVERAGE MONTHLY SALES

	Year 1	Year 2	Year 3
Tier II Brand Fast Food Sales* (Dollars)	\$76,900	\$78,283	\$79,284
Daily Fast Food Sales (Dollars)	\$2,528	\$2,574	\$2,607
Weekly Fast Food Sales (Dollars)	\$17,746	\$18,065	\$18,296
Annual Fast Food Sales (Dollars)	\$922,800	\$939,396	\$951,408

*Fast food sales must be calibrated with the selected franchise

ANALYTICAL SALES RANGE

LOW	Year 1	Year 2	Year 3
Tier II Brand Fast Food Sales (Dollars)	\$68,057	\$69,280	\$70,166
Daily Fast Food Sales (Dollars)	\$2,237	\$2,278	\$2,307
Weekly Fast Food Sales (Dollars)	\$15,705	\$15,988	\$16,192
Annual Fast Food Sales (Dollars)	\$816,684	\$831,360	\$841,992

HIGH

HIGH	Year 1	Year 2	Year 3
Tier II Brand Fast Food Sales (Dollars)	\$83,437	\$84,937	\$86,023
Daily Fast Food Sales (Dollars)	\$2,743	\$2,792	\$2,828
Weekly Fast Food Sales (Dollars)	\$19,255	\$19,601	\$19,851
Annual Fast Food Sales (Dollars)	\$1,001,244	\$1,019,244	\$1,032,276

PROJECTION METRICS

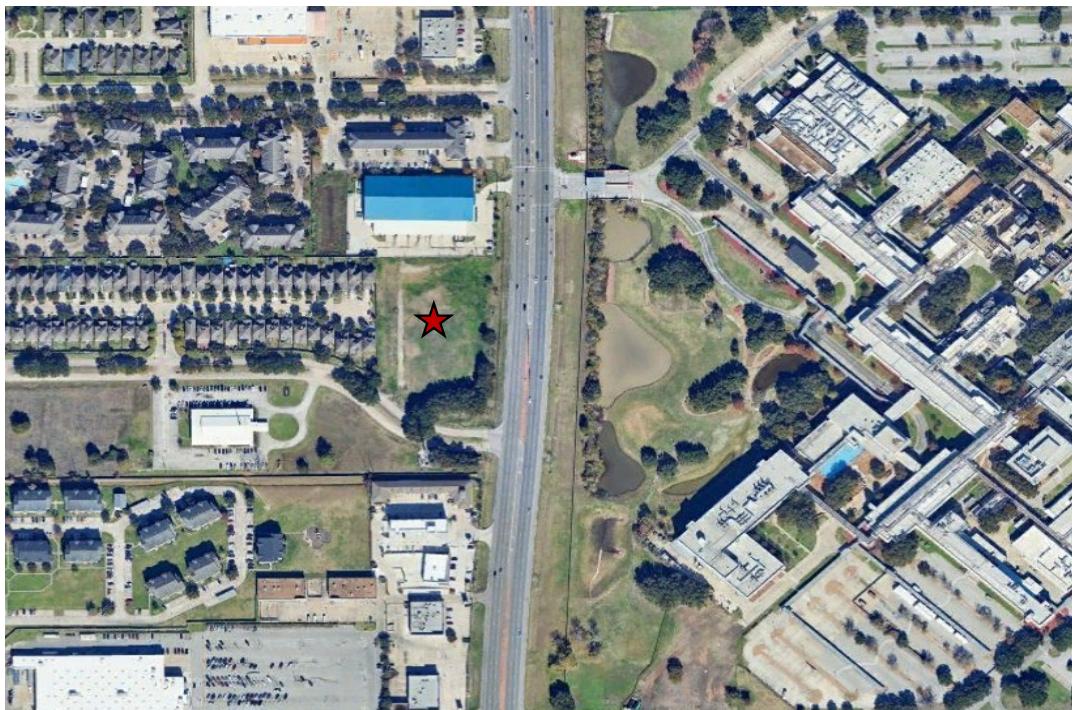
Primary Area of Influence	Custom	Market Share Fast Food Sales Year 1	13.6%
Area in Square Miles	2.62	Traffic Capture Fast Food Sales Year 1	0.37%
Total Intersection Traffic VPD	73,335	Household Change 2023-2028	0.1%
Explained Intersection Traffic	42.9%	Socioeconomic Score	45
Passing Intersection Traffic	57.1%		
		QSR Square Feet with Drive-Thru	1,500
		QSR Parking/Interior Seating	32/30

Facility Development Strategy: Car Wash

Name:	Kroozin	Operation:	CS Chain	Case #:	1	 kroozin
Location:	State Highway 6 and Branch Forest Drive			Intersection:	NW	
Type:	Express Conveyor					

Car Wash Capacity and Exterior				Competitive Car Wash Impact	
				CW Impact Score	95.5
1	Number of Car Wash Bays	3	# of Access Points		
CS Chain	Chain Recognition	Interior	Visibility		
5	Chain Sign Facings	Unregulated	Traffic Regulation		
	Full Service Bays	Crossover	Road Configuration		
1	Conveyor Bays	Standard	On Site Movement		
	Soft Touch Bays	45	Posted Speed	Economy	
	Touchless Bays	12	Fuel Dispensers	Good	\$9.00
	Wand Bays	6,000	Convenience Store	Better	\$12.00
2	Transaction Stations		Quick Lube Bays	Best	\$15.00
				Unlimited Monthly	\$20-\$30

Car Wash Amenities and Services					
x	Attendants	CS Chain	Exterior Maintenance	Self Service	Detail Area
18	Vacuum Stations	CS Chain	Exterior Lighting	x	Unlimited Wash Promo
Free	Vacuum Vending	CS Chain	Exterior Signage	x	Wash Cross Promo



Projections, Analytical Range, and Metrics

State Highway 6 and Branch Forest Drive, Houston, Texas 77082

AVERAGE MONTHLY CAR WASH SALES

	Year 1	Year 2	Year 3
Car Wash Sales (Dollars)	\$61,663	\$62,775	\$63,575
Annual Car Wash Sales (Dollars)	\$739,950	\$753,300	\$762,900

ANALYTICAL CAR WASH SALES RANGE

LOW	Year 1	Year 2	Year 3
Car Wash Sales (Dollars)	\$55,500	\$56,500	\$57,213
Annual Car Wash Sales (Dollars)	\$666,000	\$678,000	\$686,550

HIGH

HIGH	Year 1	Year 2	Year 3
Car Wash Sales (Dollars)	\$67,825	\$69,050	\$69,938
Annual Car Wash Sales (Dollars)	\$813,900	\$828,600	\$839,250

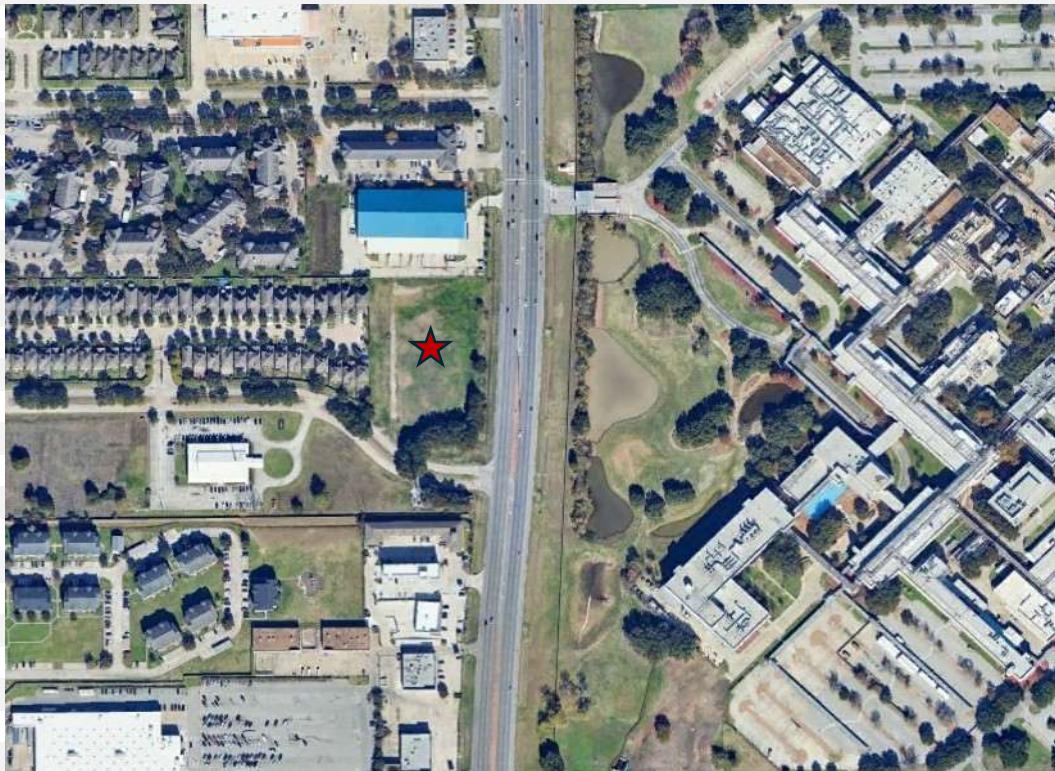
PROJECTION METRICS

Primary Area of Influence	Custom	Average Per Wash Revenue Year 1	\$12.50
Area in Square Miles	2.62	Average Daily Washes Year 1	164
Total Intersection Traffic VPD	73,335	Average Monthly Washes Year 1	4,933
Explained Intersection Traffic	42.9%	Average Per Wash Revenue Year 1	\$12.50
Passing Intersection Traffic	57.1%	Average Daily Washes Year 2	167
		Average Monthly Washes Year 2	5,022
Annual Car Wash Count Year 1	127,104	Average Per Wash Revenue Year 1	\$12.50
Annual Car Wash Count Year 2	113,124	Average Daily Washes Year 3	170
Annual Car Wash Count Year 3	138,540	Average Monthly Washes Year 3	5,086

Facility Development Strategy: Washateria

Name:	Kroozin Washateria	Operation:	Chain	Case #:	1	
Location:	State Highway 6 and Branch Forest Drive					

Washateria Capacity and Amenities		Competitive Washateria Impact	
		Washateria Impact Score	
32	# of Parking Spaces		144.5
45	# of Washing Machines		
60	# of Dryers		
<input checked="" type="checkbox"/>	Attendant		
<input checked="" type="checkbox"/>	Wash and Fold		
<input checked="" type="checkbox"/>	Chain		
4,000	Washateria Square Feet		



Projections, Analytical Range, and Metrics

State Highway 6 and Branch Forest Drive, Houston, Texas 77082

AVERAGE WASHATERIA SALES

	Year 1	Year 2	Year 3
Washateria Sales (Dollars)	\$42,338	\$43,099	\$43,650
Annual Washateria Sales (Dollars)	\$508,056	\$517,188	\$523,800

ANALYTICAL SALES RANGE

LOW	Year 1	Year 2	Year 3
Washateria Sales (Dollars)	\$37,469	\$38,143	\$38,630
Annual Washateria Sales (Dollars)	\$449,628	\$457,716	\$463,560

HIGH

HIGH	Year 1	Year 2	Year 3
Washateria Sales (Dollars)	\$45,937	\$46,762	\$47,360
Annual Washateria Sales (Dollars)	\$551,244	\$561,144	\$568,320

PROJECTION METRICS and WASHATERIA DEVELOPMENT STRATEGY

Primary Area of Influence	Custom	Washateria Square Footage	4,000
Area in Square Miles	2.62	Washateria Washer Count	45
Total Intersection Traffic VPD	73,335	Washateria Dryer Count	60
Explained Intersection Traffic	48.9%	Washateria \$ per square foot	\$10.58
Passing Intersection Traffic	51.1%	Operational Hours	18
		Washateria Coin Laundry	Yes
% Population Hispanic	24.2%	Washateria Wash and Fold Service	Yes
% Population White	17.1%		
% Population Black	46.4%		
Average Household Size	2.5		
% Blue Collar Occupations	45.9%		
% Household Incomes Below \$50,000	38.0%	Washateria Sales Daily Year 1	\$1,392
% Households Renter Occupied	68.6%	Washateria Sales Weekly Year 1	\$9,770

Site Photos



Branch Forest Drive eastbound approach



Site frontage along State Highway 6 facing south



Site view across State Highway 6

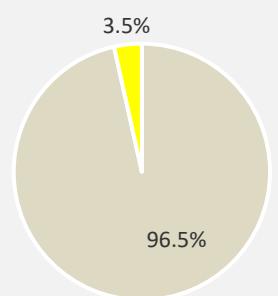


Site view across Branch Forest Drive

Traffic Summary

VPD Stats					
	Direction	Count	Classification	Ingress	Egress
State Highway 6	n	37,081	Auto	Turn	Turn
	s	32,869		Frontage	Frontage
	n	996	Truck		
	s	1,521			
Branch Forest Drive	e	829	Auto	Restricted	Restricted
			Truck		
	e	39			
	Direction	Percent	Classification	Percent	Frontage
State Highway 6	n	50.6%	Auto	96.5%	46.9%
	s	44.8%			
	n	1.4%	Truck	3.5%	
	s	2.1%			
Branch Forest Drive	e	1.1%	Auto	95.5%	0.0%
			Truck	4.5%	
	e	0.1%			
Total Intersection VPD	Autos:	70,779			
	Trucks:	<u>2,556</u>			
	Total Vehicles:	73,335			
State Highway 6	Autos:	69,950			
	Trucks:	<u>2,517</u>			
	Total Vehicles:	72,467			
Branch Forest Drive	Autos:	829			
	Trucks:	39			
	Total Vehicles:	868			

e	1.2%
s	46.9%
n	51.9%



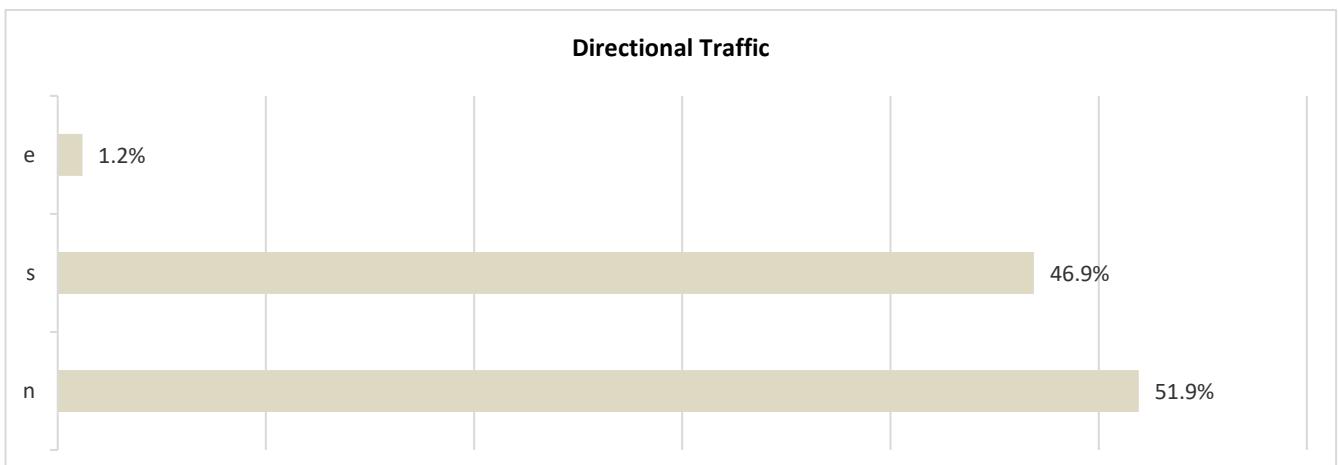
3.5%

96.5%

Autos

Trucks

Directional Traffic

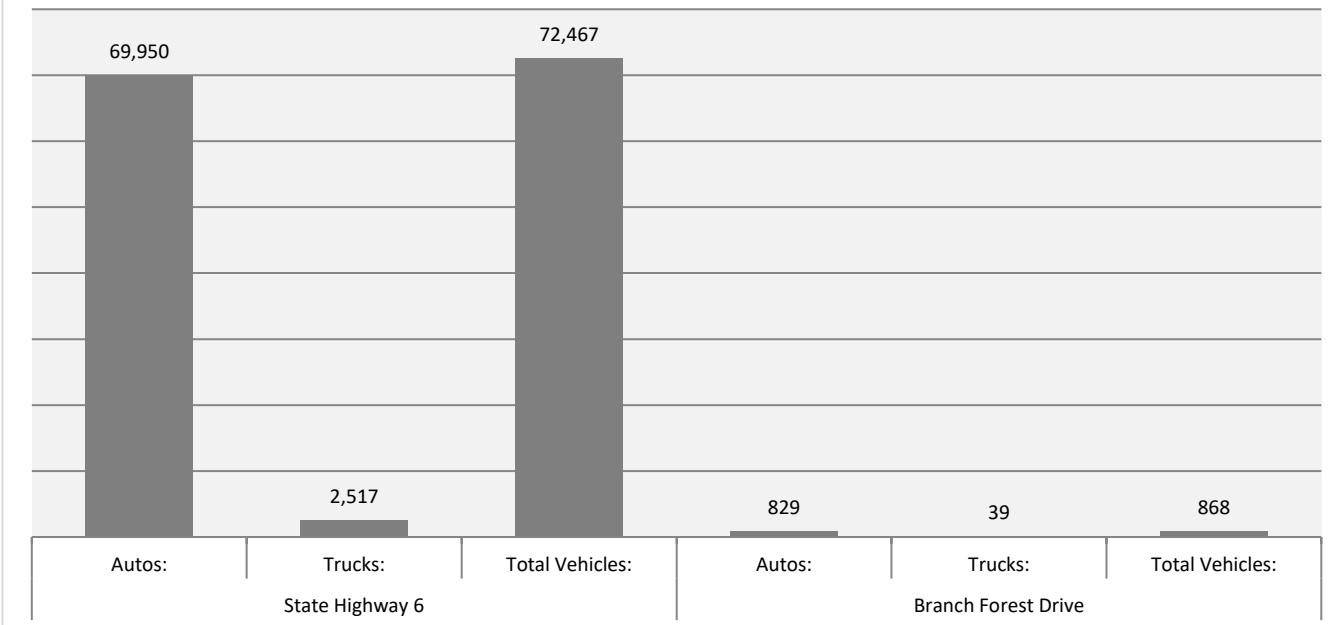


e	1.2%
s	46.9%
n	51.9%

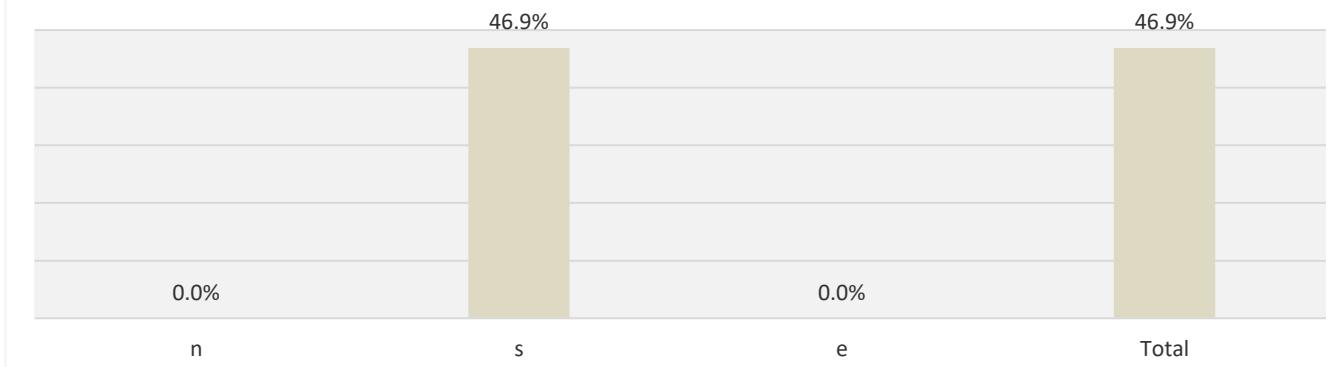
Traffic Summary

VPD Charts

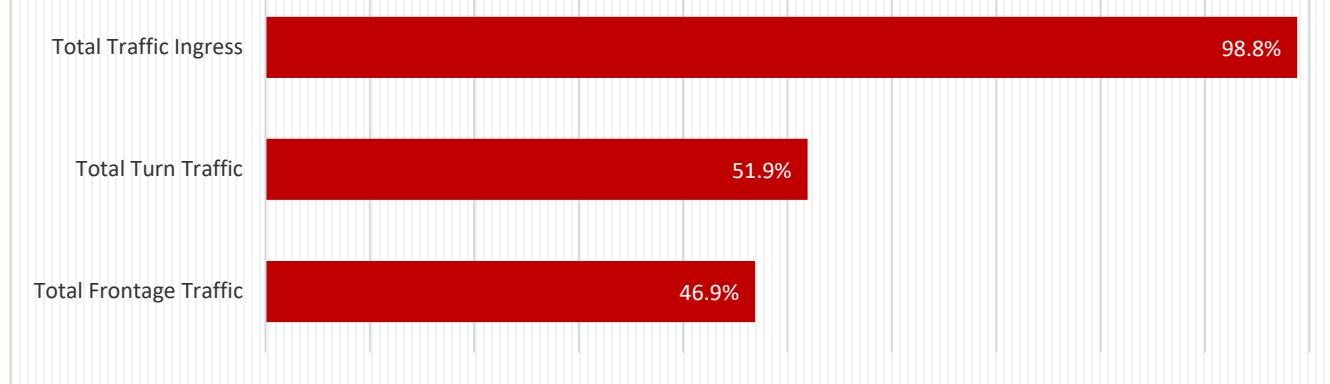
Vehicles per Day (VPD)



Total Frontage Traffic (% Total)

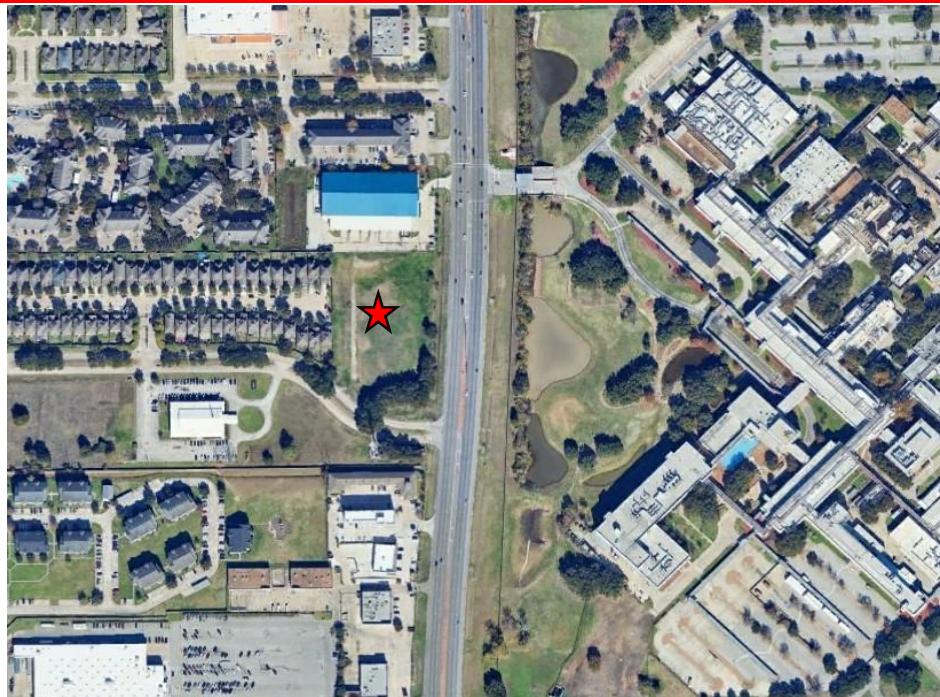


Total Traffic Ingress

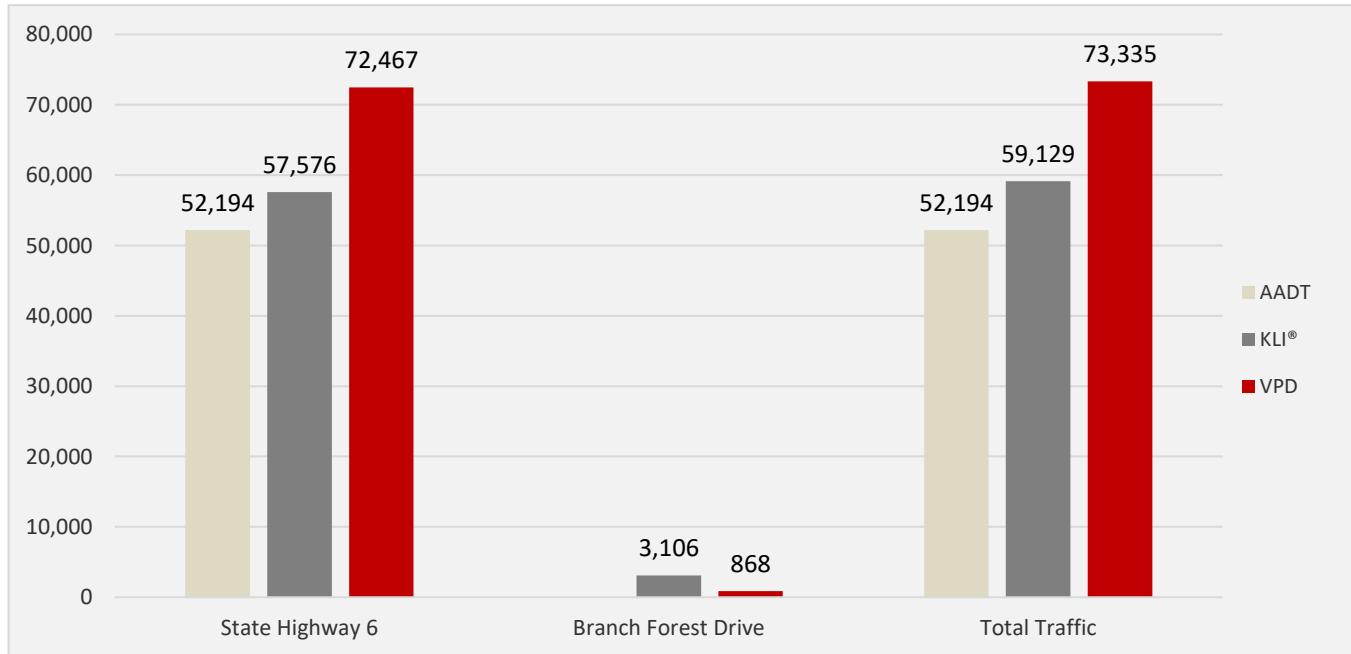


Traffic Summary

AADT Map



Texas DOT/KLI®	AADT	Location	KLI®	Year
State Highway 6	52,194	north	48,106	2023/2024
		south	67,046	2024
Branch Forest Drive		relative	3,106	2024



Consumer Potential Scores

Location:

State Highway 6 and Branch Forest Drive
Houston, Texas 77082

CUSTOM
BOUNDARY
2.62 SQ/MI



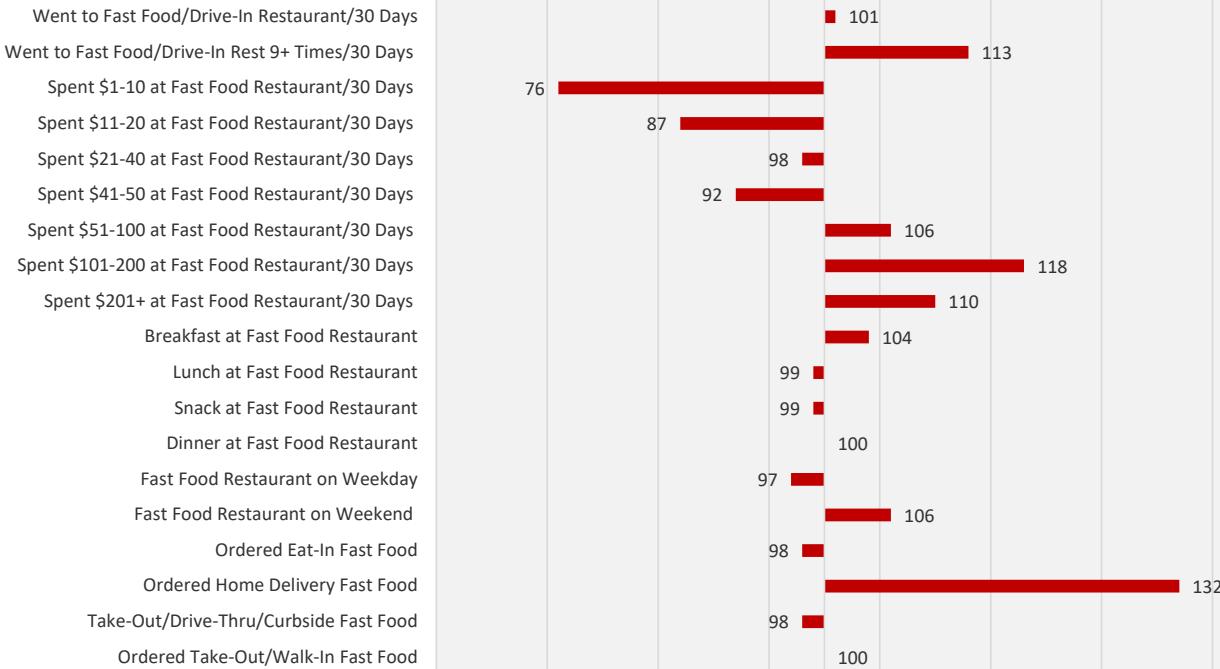
Consumer Potential Scores

Location:

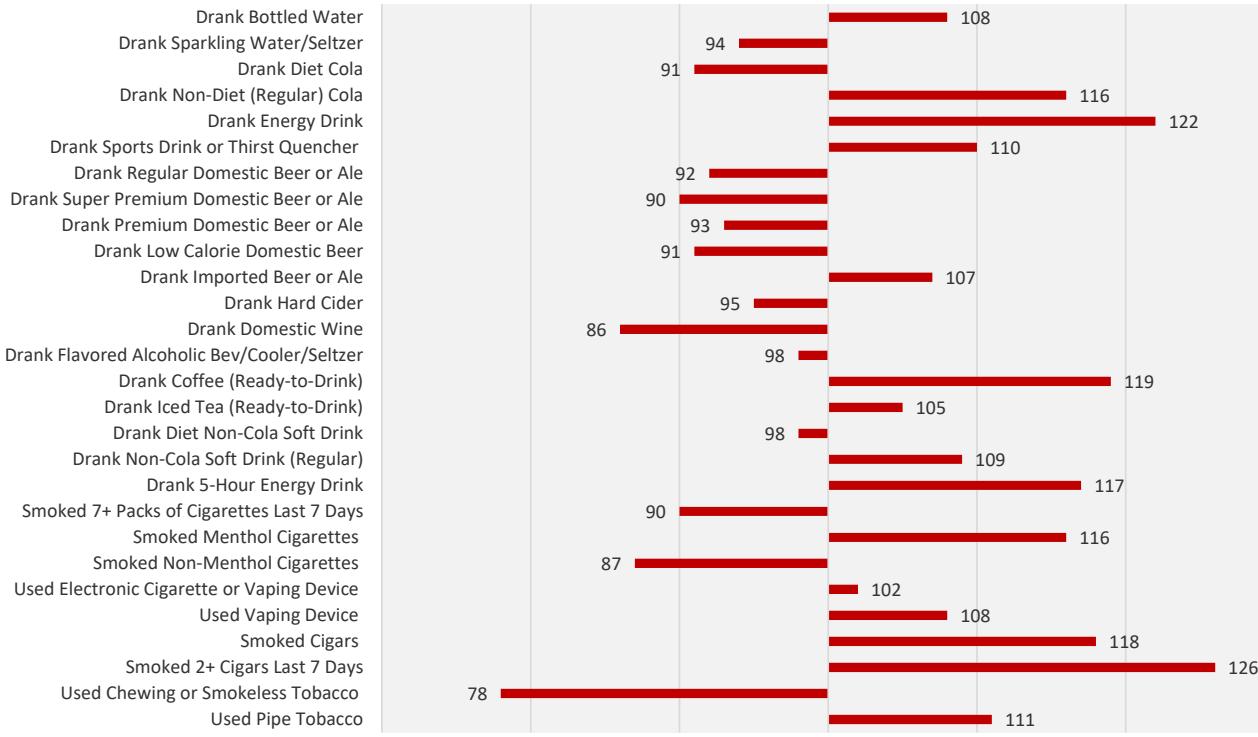
State Highway 6 and Branch Forest Drive
Houston, Texas 77082

CUSTOM
BOUNDARY
2.62 SQ/MI

Fast Food



Beverage and Tobacco

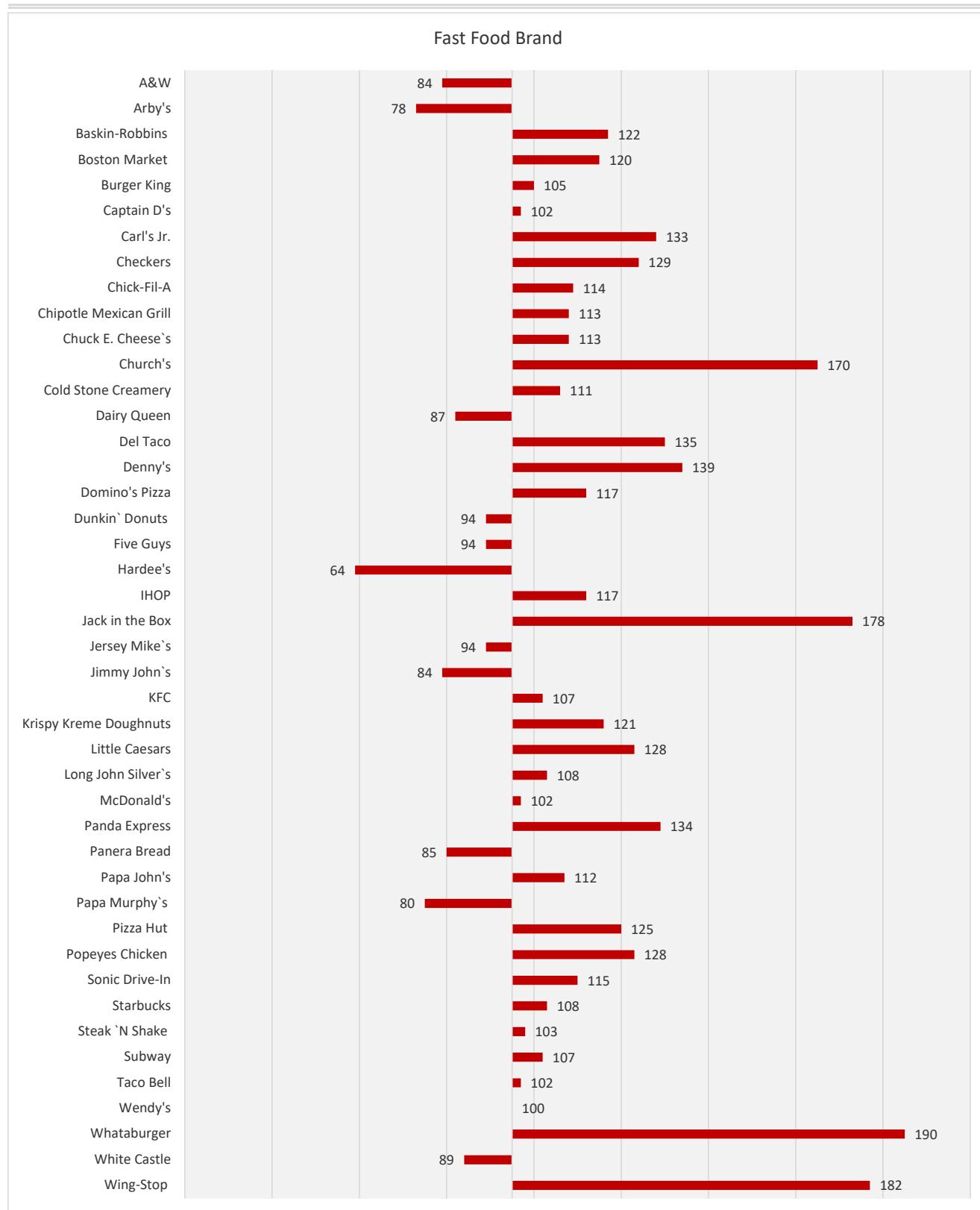


Consumer Potential Scores

Location:

State Highway 6 and Branch Forest Drive
Houston, Texas 77082

1.5 MILE
RING
7.07 SQ/MI



Competitive Analysis Summary: Fuel and Convenience Store

Competitive Capacity Metrics

13	Total Competitive Units
1.1	Average Distance in Miles
182	Total Gasoline Fueling Positions
128	Total Diesel Fueling Positions
-	Total Truck Diesel Lanes
49,250	Total Convenience Store Square Footage

Brands and Convenience Store Chains



Performance and Impact Indicators

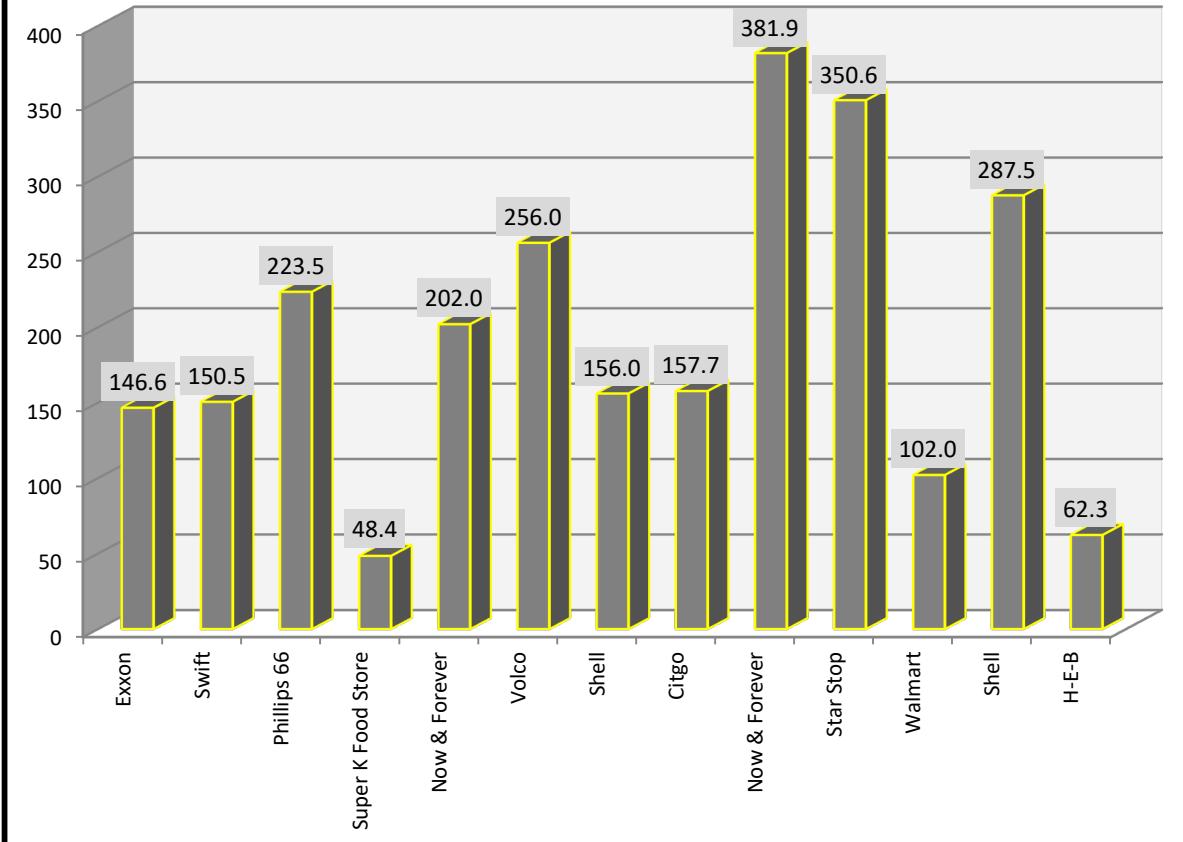
26%	Performance Auto Fuel Positions
39%	Performance Convenience Store Parking
	Performance Truck Diesel Lanes
31,011	Audit Fuel Gallons per Forecast Dispenser
\$39.35	Audit Convenience Store Dollars per Square Foot
	Audit Fuel Gallons per Truck Lane
0.39	Average Distance Impact
0.12	Minimum Distance Impact
0.95	Maximum Distance Impact

Fuel Pricing Metrics

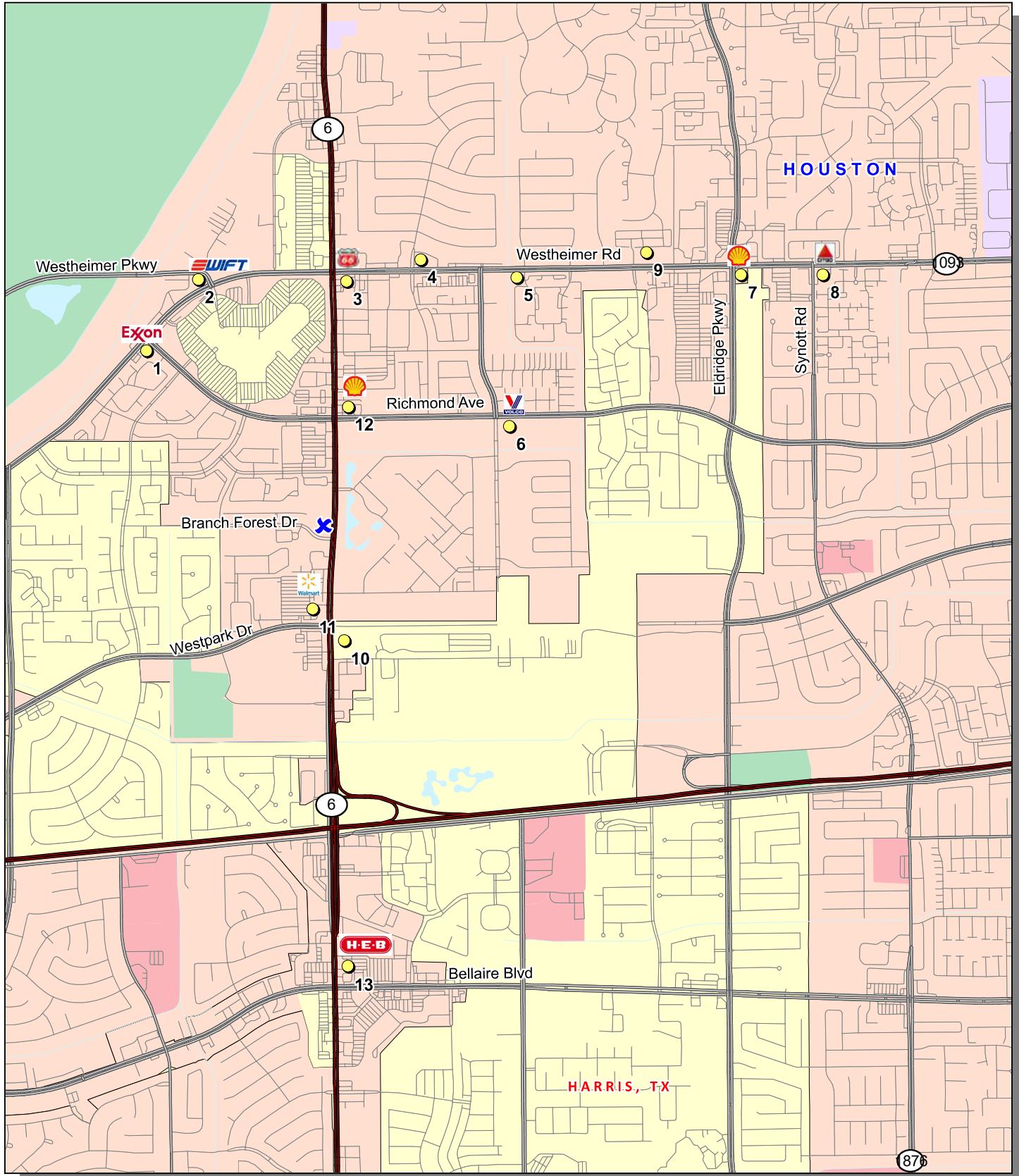
Market Price Gasoline	\$2.62	9
Lead Price Gasoline	\$2.46	9
Max Price Gasoline	\$2.79	9
Variance Gasoline	\$0.33	9
Market Price Diesel	\$2.91	9
Lead Price Diesel	\$2.77	9
Max Price Diesel	\$3.19	9
Variance Diesel	\$0.42	9

Audit Date: 4/29/2025

Cx Impact Scores



Competition



Competition Analysis: Fuel and Convenience Store

Name: Location: Type:	Primetime	Brand: Intersection: Distance:	Map #: SW 0.9	1	Exxon
	Westheimer Road and Richmond Avenue				
	Convenience Store				

Forecourt and Exterior			Posted Prices		
4	MPD's	x	Canopy	Unleaded	\$2.79 9
	Electronic	x	Air		
8	# of Gasoline Hoses	4	Brand Sign Facings	Diesel	\$2.99 9
3	# of Gasoline Grades	2	Price Sign Facings	<i>Cash/Card Price</i>	
8	# of Gasoline Fueling Positions	x	LED Price Sign	Unleaded	\$2.59 9
4	# of Diesel Fueling Positions	3	# of Access Points	Diesel	
	# of Truck Diesel Lanes	Intersection	Visibility	Strategy	0.17 Unleaded
	Non-Ethanol	Electronic	Traffic Regulation		0.08 Diesel
	E-85	Divided	Road Configuration	Competitive Impact	
	EV Stations	Standard	On Site Movement	Gasoline Score	84.0
12	# of Self Service Hoses	40	Posted Speed	Diesel Score	13.0
	# of Full Service Hoses	4,000	Size of Store	Convenience Store Score	73.8
Dive In	Fuel Configuration	7	Up Front Parking	Fast Food Score	20.0
	Car Wash		Truck Parking	Distance Score	0.32

Convenience Store						
18	Walk In Cooler Doors	Brand	Maintenance	Expanded	Restrooms	
1	Reach In Cooler Doors	Brand	Interior Lighting	Brand	Snack Merchandising	
Brand	Beverage Merchandising	Brand	Interior Signage	Brand	Tobacco Merchandising	
4	Freezer Doors	x	Fountain Beverage	24	Hours of Operation	
8	Beer/Wine Doors	x	Coffee Bar	2	Cashier Stations	
	Beer Cave		Fast Food Brand	x	Lottery	
Brand	Operation	Made to Order	Fast Food	x	ATM	



Competition Analysis: Fuel and Convenience Store

Name: Location: Type:	Swift	Brand:	Swift	Map #: Intersection: Distance:	2	
	Westheimer Road and Westheimer Parkway				NW	
	Convenience Store				1.2	

Forecourt and Exterior			Posted Prices		
4	MPD's	x	Canopy	Unleaded	\$2.59 9
	Electronic	x	Air		
8	# of Gasoline Hoses	7	Brand Sign Facings	Diesel	\$2.89 9
3	# of Gasoline Grades	4	Price Sign Facings	Cash/Card Price	
8	# of Gasoline Fueling Positions	x	LED Price Sign	Unleaded	\$2.39 9
4	# of Diesel Fueling Positions	3	# of Access Points	Diesel	
	# of Truck Diesel Lanes	Intersection	Visibility	Strategy	-0.03 Unleaded
	Non-Ethanol	Electronic	Traffic Regulation		-0.02 Diesel
	E-85	Divided	Road Configuration	Competitive Impact	
	EV Stations	Standard	On Site Movement	Gasoline Score	
12	# of Self Service Hoses	40	Posted Speed	Diesel Score	
	# of Full Service Hoses	2,500	Size of Store	Convenience Store Score	
Dive In	Fuel Configuration	6	Up Front Parking	Fast Food Score	
	Car Wash		Truck Parking	Distance Score	

Convenience Store						
14	Walk In Cooler Doors	Chain	Maintenance	Interior	Restrooms	
1	Reach In Cooler Doors	Chain	Interior Lighting	Chain	Snack Merchandising	
Chain	Beverage Merchandising	Chain	Interior Signage	Chain	Tobacco Merchandising	
3	Freezer Doors	x	Fountain Beverage	18	Hours of Operation	
5	Beer/Wine Doors	x	Coffee Bar	1	Cashier Stations	
	Beer Cave		Fast Food Brand	x	Lottery	
Chain	Operation		Fast Food	x	ATM	



Competition Analysis: Fuel and Convenience Store

Name:	Now & Forever	Brand:	Phillips 66	Map #: Intersection: Distance:	3	
Location:	Westheimer Road and State Highway 6				SE	
Type:	Convenience Store				0.7	

Forecourt and Exterior				Posted Prices	
8	MPD's	x	Canopy	Unleaded	\$2.53 9
	Electronic	x	Air		
26	# of Gasoline Hoses	5	Brand Sign Facings	Diesel	\$2.85 9
4	# of Gasoline Grades	2	Price Sign Facings	Cash/Card Price	
16	# of Gasoline Fueling Positions	x	LED Price Sign	Unleaded	
16	# of Diesel Fueling Positions	4	# of Access Points	Diesel	
	# of Truck Diesel Lanes	Intersection	Visibility	Strategy	-0.09 Unleaded
	Non-Ethanol	Electronic	Traffic Regulation		-0.06 Diesel
10	E-85	Divided	Road Configuration	Competitive Impact	
	EV Stations	Standard	On Site Movement	Gasoline Score	102.0
42	# of Self Service Hoses	40	Posted Speed	Diesel Score	26.0
	# of Full Service Hoses	4,500	Size of Store	Convenience Store Score	95.5
Stacked	Fuel Configuration	7	Up Front Parking	Fast Food Score	0.0
	Car Wash		Truck Parking	Distance Score	0.41

Convenience Store						
24	Walk In Cooler Doors	Chain	Maintenance	Interior	Restrooms	
4	Reach In Cooler Doors	Chain	Interior Lighting	Chain	Snack Merchandising	
Chain	Beverage Merchandising	Chain	Interior Signage	Chain	Tobacco Merchandising	
10	Freezer Doors	x	Fountain Beverage	24	Hours of Operation	
8	Beer/Wine Doors	x	Coffee Bar	4	Cashier Stations	
x	Beer Cave		Fast Food Brand	x	Lottery	
Chain	Operation		Fast Food	x	ATM	



Competition Analysis: Fuel and Convenience Store

Name:	Super K Food Store	Brand:		Map #:	4	
Location:	Westheimer Road and Briargreen Drive			Intersection:	NE	
Type:	Convenience Store			Distance:	1.1	

Forecourt and Exterior			Posted Prices		
MPD's	Canopy	Unleaded			
Electronic	Air				
# of Gasoline Hoses	3	Brand Sign Facings	Diesel		
# of Gasoline Grades		Price Sign Facings	Cash/Card Price		
# of Gasoline Fueling Positions		LED Price Sign	Unleaded		
# of Diesel Fueling Positions	3	# of Access Points	Diesel		
# of Truck Diesel Lanes	Intersection	Visibility	Strategy	Unleaded	
Non-Ethanol	Electronic	Traffic Regulation		Diesel	
E-85	Divided	Road Configuration	Competitive Impact		
EV Stations		On Site Movement	Gasoline Score	0.0	
# of Self Service Hoses	40	Posted Speed	Diesel Score	0.0	
# of Full Service Hoses	2,900	Size of Store	Convenience Store Score	48.4	
Fuel Configuration	7	Up Front Parking	Fast Food Score	0.0	
Car Wash		Truck Parking	Distance Score	0.26	

Convenience Store						
10	Walk In Cooler Doors	Independent	Maintenance	Interior	Restrooms	
12	Reach In Cooler Doors	Independent	Interior Lighting	Standard	Snack Merchandising	
Standard	Beverage Merchandising	Independent	Interior Signage	Standard	Tobacco Merchandising	
4	Freezer Doors	x	Fountain Beverage	18	Hours of Operation	
9	Beer/Wine Doors		Coffee Bar	1	Cashier Stations	
	Beer Cave		Fast Food Brand	x	Lottery	
Independent	Operation		Fast Food	x	ATM	



Competition Analysis: Fuel and Convenience Store

Name: Location: Type:	Now & Forever	Brand:	Now & Forever	Map #: Intersection: Distance:	5	
	Westheimer Road and Joel Wheaton Road				SW	
	Convenience Store				1.3	

Forecourt and Exterior			Posted Prices		
6	MPD's	x	Canopy	Unleaded	\$2.69 9
	Electronic	x	Air		
12	# of Gasoline Hoses	5	Brand Sign Facings	Diesel	\$2.99 9
3	# of Gasoline Grades	2	Price Sign Facings	Cash/Card Price	
12	# of Gasoline Fueling Positions	x	LED Price Sign	Unleaded	\$2.49 9
12	# of Diesel Fueling Positions	2	# of Access Points	Diesel	\$2.89 9
	# of Truck Diesel Lanes	Interior	Visibility	Strategy	0.07 Unleaded
	Non-Ethanol	Unregulated	Traffic Regulation		0.08 Diesel
	E-85	Crossover	Road Configuration	Competitive Impact	
	EV Stations	Standard	On Site Movement	Gasoline Score	91.0
24	# of Self Service Hoses	40	Posted Speed	Diesel Score	19.0
	# of Full Service Hoses	4,500	Size of Store	Convenience Store Score	92.0
Stacked	Fuel Configuration	8	Up Front Parking	Fast Food Score	20.0
	Car Wash		Truck Parking	Distance Score	0.22

Convenience Store						
20	Walk In Cooler Doors	Chain	Maintenance	Standard	Restrooms	
4	Reach In Cooler Doors	Chain	Interior Lighting	Chain	Snack Merchandising	
Chain	Beverage Merchandising	Chain	Interior Signage	Chain	Tobacco Merchandising	
4	Freezer Doors	x	Fountain Beverage	24	Hours of Operation	
7	Beer/Wine Doors	x	Coffee Bar	2	Cashier Stations	
x	Beer Cave		Fast Food Brand	x	Lottery	
Chain	Operation	Made to Order	Fast Food	x	ATM	



Competition Analysis: Fuel and Convenience Store

Name:	Bunny Stop	Brand:	Volco	Map #:	6	
Location:	Richmond Avenue and W. Hollow Drive			Intersection:	SE	
Type:	Convenience Store			Distance:	0.9	

Forecourt and Exterior				Posted Prices	
10	MPD's	x	Canopy	Unleaded	\$2.67 9
	Electronic	x	Air		
20	# of Gasoline Hoses	5	Brand Sign Facings	Diesel	\$2.88 9
3	# of Gasoline Grades	2	Price Sign Facings	Cash/Card Price	
20	# of Gasoline Fueling Positions	x	LED Price Sign	Unleaded	\$2.57 9
20	# of Diesel Fueling Positions	2	# of Access Points	Diesel	
	# of Truck Diesel Lanes	Intersection	Visibility	Strategy	0.05 Unleaded
	Non-Ethanol	Electronic	Traffic Regulation		-0.03 Diesel
	E-85	Crossover	Road Configuration	Competitive Impact	
	EV Stations	Standard	On Site Movement	Gasoline Score	
40	# of Self Service Hoses	35	Posted Speed	Diesel Score	
	# of Full Service Hoses	5,800	Size of Store	Convenience Store Score	
Dive In	Fuel Configuration	11	Up Front Parking	Fast Food Score	
Soft Touch	Car Wash		Truck Parking	Distance Score	

Convenience Store						
13	Walk In Cooler Doors	Chain	Maintenance	Expanded	Restrooms	
6	Reach In Cooler Doors	Chain	Interior Lighting	Chain	Snack Merchandising	
Chain	Beverage Merchandising	Chain	Interior Signage	Chain	Tobacco Merchandising	
4	Freezer Doors	x	Fountain Beverage	24	Hours of Operation	
5	Beer/Wine Doors	x	Coffee Bar	3	Cashier Stations	
x	Beer Cave		Fast Food Brand	x	Lottery	
Chain	Operation	Made to Order	Fast Food	x	ATM	



Competition Analysis: Fuel and Convenience Store

Name:	Timewise	Brand:	Shell	Map #:	7	
Location:	Westheimer Road and Eldridge Parkway S.			Intersection:	SE	
Type:	Convenience Store			Distance:	2.0	

Forecourt and Exterior				Posted Prices		
6	MPD's	x	Canopy	Unleaded	\$2.69	9
	Electronic	x	Air			
12	# of Gasoline Hoses	12	Brand Sign Facings	Diesel		
3	# of Gasoline Grades	4	Price Sign Facings	Cash/Card Price		
12	# of Gasoline Fueling Positions	x	LED Price Sign	Unleaded	\$2.59	9
	# of Diesel Fueling Positions	3	# of Access Points	Diesel		
	# of Truck Diesel Lanes	Intersection	Visibility	Strategy	0.07	Unleaded
	Non-Ethanol	Electronic	Traffic Regulation			Diesel
	E-85	Divided	Road Configuration	Competitive Impact		
	EV Stations	Standard	On Site Movement	Gasoline Score	87.0	
12	# of Self Service Hoses	40	Posted Speed	Diesel Score	0.0	
	# of Full Service Hoses	2,800	Size of Store	Convenience Store Score		
Stacked	Fuel Configuration	8	Up Front Parking	Fast Food Score	69.0	
	Car Wash		Truck Parking	Distance Score	5.0	
					0.14	

Convenience Store						
12	Walk In Cooler Doors	Chain	Maintenance	Standard	Restrooms	
	Reach In Cooler Doors	Chain	Interior Lighting	Chain	Snack Merchandising	
Chain	Beverage Merchandising	Chain	Interior Signage	Chain	Tobacco Merchandising	
6	Freezer Doors	x	Fountain Beverage	24	Hours of Operation	
5	Beer/Wine Doors	x	Coffee Bar	2	Cashier Stations	
	Beer Cave		Fast Food Brand	x	Lottery	
Chain	Operation	Roller Grill	Fast Food	x	ATM	



Competition Analysis: Fuel and Convenience Store

Name:	Speedy Express	Brand:	CITGO	Map #:	8	
Location:	Westheimer Road and Synott Road			Intersection:	SE	
Type:	Convenience Store			Distance:	2.3	

Forecourt and Exterior				Posted Prices	
8	MPD's	x	Canopy	Unleaded	\$2.79 9
	Electronic	x	Air		
16	# of Gasoline Hoses	5	Brand Sign Facings	Diesel	\$3.19 9
3	# of Gasoline Grades	2	Price Sign Facings	Cash/Card Price	
16	# of Gasoline Fueling Positions	x	LED Price Sign	Unleaded	\$2.59 9
8	# of Diesel Fueling Positions	2	# of Access Points	Diesel	
	# of Truck Diesel Lanes	Intersection	Visibility	Strategy	0.17 Unleaded
	Non-Ethanol	Electronic	Traffic Regulation		0.28 Diesel
	E-85	Divided	Road Configuration	Competitive Impact	
	EV Stations	Standard	On Site Movement	Gasoline Score	
24	# of Self Service Hoses	40	Posted Speed	Diesel Score	
	# of Full Service Hoses	4,000	Size of Store	Convenience Store Score	
Stacked	Fuel Configuration	9	Up Front Parking	Fast Food Score	
	Car Wash		Truck Parking	Distance Score	

Convenience Store						
12	Walk In Cooler Doors	Brand	Maintenance	Standard	Restrooms	
4	Reach In Cooler Doors	Brand	Interior Lighting	Brand	Snack Merchandising	
Brand	Beverage Merchandising	Brand	Interior Signage	Brand	Tobacco Merchandising	
7	Freezer Doors	x	Fountain Beverage	24	Hours of Operation	
2	Beer/Wine Doors	x	Coffee Bar	2	Cashier Stations	
x	Beer Cave		Fast Food Brand	x	Lottery	
Brand	Operation	Roller Grill	Fast Food	x	ATM	



Competition Analysis: Fuel and Convenience Store

Name: Location: Type:	Now & Forever	Brand: Intersection: Distance:	Map #: NE 1.7	9	
	Westheimer Road and Windchase Boulevard				
	Convenience Store				

Forecourt and Exterior			Posted Prices		
18	MPD's	x	Canopy	Unleaded	\$2.49 9
	Electronic	x	Air		
36	# of Gasoline Hoses	6	Brand Sign Facings	Diesel	\$2.77 9
3	# of Gasoline Grades	2	Price Sign Facings	Cash/Card Price	
36	# of Gasoline Fueling Positions	x	LED Price Sign	Unleaded	\$2.39 9
36	# of Diesel Fueling Positions	3	# of Access Points	Diesel	\$2.67 9
	# of Truck Diesel Lanes	Intersection	Visibility	Strategy	-0.13 Unleaded
	Non-Ethanol	Electronic	Traffic Regulation		-0.14 Diesel
	E-85	Divided	Road Configuration	Competitive Impact	
	EV Stations	Standard	On Site Movement	Gasoline Score	147.0
72	# of Self Service Hoses	40	Posted Speed	Diesel Score	47.0
	# of Full Service Hoses	6,000	Size of Store	Convenience Store Score	111.5
Stacked	Fuel Configuration	13	Up Front Parking	Fast Food Score	5.0
Conveyor	Car Wash		Truck Parking	Distance Score	0.17

Convenience Store						
24	Walk In Cooler Doors	Chain	Maintenance	Expanded	Restrooms	
2	Reach In Cooler Doors	Chain	Interior Lighting	Chain	Snack Merchandising	
Chain	Beverage Merchandising	Chain	Interior Signage	Chain	Tobacco Merchandising	
6	Freezer Doors	x	Fountain Beverage	24	Hours of Operation	
8	Beer/Wine Doors	x	Coffee Bar	2	Cashier Stations	
x	Beer Cave		Fast Food Brand	x	Lottery	
Chain	Operation	Roller Grill	Fast Food	x	ATM	



Competition Analysis: Fuel and Convenience Store

Name:	Star Stop	Brand:	Star Stop	Map #: Intersection: Distance:	10	
Location:	State Highway 6 and Schiller Road				NE	
Type:	Convenience Store				0.3	

Forecourt and Exterior				Posted Prices		
10	MPD's	x	Canopy	Unleaded	\$2.46	9
	Electronic	x	Air			
20	# of Gasoline Hoses	5	Brand Sign Facings	Diesel	\$2.87	9
4	# of Gasoline Grades	4	Price Sign Facings	Cash/Card Price		
20	# of Gasoline Fueling Positions	x	LED Price Sign	Unleaded		
10	# of Diesel Fueling Positions	3	# of Access Points	Diesel		
	# of Truck Diesel Lanes	Intersection	Visibility	Strategy	-0.16	Unleaded
	Non-Ethanol	Electronic	Traffic Regulation		-0.04	Diesel
10	E-85	Divided	Road Configuration	Competitive Impact		
	EV Stations	Standard	On Site Movement	Gasoline Score	134.5	
30	# of Self Service Hoses	45	Posted Speed	Diesel Score	21.5	
	# of Full Service Hoses	7,000	Size of Store	Convenience Store Score	124.5	
Dive In	Fuel Configuration	20	Up Front Parking	Fast Food Score	20.0	
Conveyor	Car Wash		Truck Parking	Distance Score	0.95	

Convenience Store						
26	Walk In Cooler Doors	Chain	Maintenance	Expanded	Restrooms	
	Reach In Cooler Doors	Chain	Interior Lighting	Chain	Snack Merchandising	
Chain	Beverage Merchandising	Chain	Interior Signage	Chain	Tobacco Merchandising	
4	Freezer Doors	x	Fountain Beverage	24	Hours of Operation	
12	Beer/Wine Doors	x	Coffee Bar	2	Cashier Stations	
	Beer Cave		Fast Food Brand	x	Lottery	
Chain	Operation	Made to Order	Fast Food	x	ATM	



Competition Analysis: Fuel and Convenience Store

Name:	Walmart	Brand:	Walmart	Map #: Intersection: Distance:	11	
Location:	State Highway 6 and Westpark Drive				NW	
Type:	Pumper Kiosk				0.3	

Forecourt and Exterior				Posted Prices		
6	MPD's	x	Canopy	Unleaded	\$2.46	9
	Electronic	x	Air			
12	# of Gasoline Hoses	5	Brand Sign Facings	Diesel	\$2.85	9
3	# of Gasoline Grades	2	Price Sign Facings	Cash/Card Price		
12	# of Gasoline Fueling Positions	x	LED Price Sign	Unleaded		
4	# of Diesel Fueling Positions	3	# of Access Points	Diesel		
	# of Truck Diesel Lanes	Intersection	Visibility	Strategy	-0.16	Unleaded
	Non-Ethanol	Electronic	Traffic Regulation		-0.06	Diesel
	E-85	Divided	Road Configuration	Competitive Impact		
	EV Stations	Restricted	On Site Movement	Gasoline Score	47.0	
16	# of Self Service Hoses	45	Posted Speed	Diesel Score	13.5	
	# of Full Service Hoses	150	Size of Store	Convenience Store Score	11.3	
Parallel	Fuel Configuration		Up Front Parking	Fast Food Score	0.0	
Touchless	Car Wash		Truck Parking	Distance Score	0.95	

Convenience Store						
3	Walk In Cooler Doors	Lead Chain	Maintenance		Restrooms	
	Reach In Cooler Doors	Lead Chain	Interior Lighting	Lead Chain	Snack Merchandising	
Lead Chain	Beverage Merchandising	Lead Chain	Interior Signage	Lead Chain	Tobacco Merchandising	
2	Freezer Doors		Fountain Beverage		Hours of Operation	
2	Beer/Wine Doors		Coffee Bar	2	Cashier Stations	
	Beer Cave		Fast Food Brand	x	Lottery	
Lead Chain	Operation		Fast Food		ATM	



Competition Analysis: Fuel and Convenience Store

Name:	Timewise	Brand:	Shell	Map #:	12	
Location:	State Highway 6 and Richmond Avenue			Intersection:	NE	
Type:	Convenience Store			Distance:	0.4	

Forecourt and Exterior				Posted Prices	
7	MPD's	x	Canopy	Unleaded	\$2.59 9
	Electronic	x	Air		
14	# of Gasoline Hoses	9	Brand Sign Facings	Diesel	\$2.85 9
3	# of Gasoline Grades	2	Price Sign Facings	Cash/Card Price	
14	# of Gasoline Fueling Positions	x	LED Price Sign	Unleaded	
14	# of Diesel Fueling Positions	2	# of Access Points	Diesel	
	# of Truck Diesel Lanes	Intersection	Visibility	Strategy	-0.03 Unleaded
	Non-Ethanol	Electronic	Traffic Regulation		-0.06 Diesel
	E-85	Divided	Road Configuration	Competitive Impact	
	EV Stations	Standard	On Site Movement	Gasoline Score	
28	# of Self Service Hoses	45	Posted Speed	Diesel Score	
	# of Full Service Hoses	5,000	Size of Store	Convenience Store Score	
Stacked	Fuel Configuration	11	Up Front Parking	Fast Food Score	
	Car Wash		Truck Parking	Distance Score	

Convenience Store						
20	Walk In Cooler Doors	Lead Brand	Maintenance	Standard	Restrooms	
2	Reach In Cooler Doors	Lead Brand	Interior Lighting	Lead Brand	Snack Merchandising	
Lead Brand	Beverage Merchandising	Lead Brand	Interior Signage	Lead Brand	Tobacco Merchandising	
5	Freezer Doors	x	Fountain Beverage	24	Hours of Operation	
9	Beer/Wine Doors	x	Coffee Bar	2	Cashier Stations	
	Beer Cave		Fast Food Brand	x	Lottery	
Lead Brand	Operation	Roller Grill	Fast Food	x	ATM	



Competition Analysis: Fuel and Convenience Store

Name:	H-E-B	Brand:	H-E-B	Map #: Intersection: Distance:	13	
Location:	State Highway 6 and Bellaire Boulevard				NE	
Type:	Pumper Kiosk				1.3	

Forecourt and Exterior			Posted Prices		
4	MPD's	x	Canopy	Unleaded	\$2.69 9
	Electronic	x	Air		
8	# of Gasoline Hoses	4	Brand Sign Facings	Diesel	
3	# of Gasoline Grades	2	Price Sign Facings	Cash/Card Price	
8	# of Gasoline Fueling Positions	x	LED Price Sign	Unleaded	
	# of Diesel Fueling Positions	4	# of Access Points	Diesel	
	# of Truck Diesel Lanes	Interior	Visibility	Strategy	0.07 Unleaded
	Non-Ethanol	Unregulated	Traffic Regulation		Diesel
	E-85	Divided	Road Configuration	Competitive Impact	
	EV Stations	Restricted	On Site Movement	Gasoline Score	36.5
8	# of Self Service Hoses	45	Posted Speed	Diesel Score	0.0
	# of Full Service Hoses	100	Size of Store	Convenience Store Score	7.5
Parallel	Fuel Configuration		Up Front Parking	Fast Food Score	0.0
	Car Wash		Truck Parking	Distance Score	0.22

Convenience Store					
	Walk In Cooler Doors	Lead Chain	Maintenance		Restrooms
2	Reach In Cooler Doors	Lead Chain	Interior Lighting	Lead Chain	Snack Merchandising
Lead Chain	Beverage Merchandising	Lead Chain	Interior Signage	Lead Chain	Tobacco Merchandising
	Freezer Doors		Fountain Beverage		Hours of Operation
	Beer/Wine Doors		Coffee Bar	1	Cashier Stations
	Beer Cave		Fast Food Brand		Lottery
Lead Chain	Operation		Fast Food		ATM



Competitive Analysis Summary: Fast Food

Competitive Fast Food Capacity Metrics

11	Total Competitive Units
0.9	Average Distance in Miles
31,000	Total Fast Food Restaurants Square Footage
406	Total Parking Spaces
31	Total Order Stations
554	Total Interior Restaurant Seating

Fast Food Brands and Chains



Fast Food Performance and Impact Indicators

91%	Percent Drive-Thru Service
4	Average Drive-Thru Count
31%	Capacity Parking %

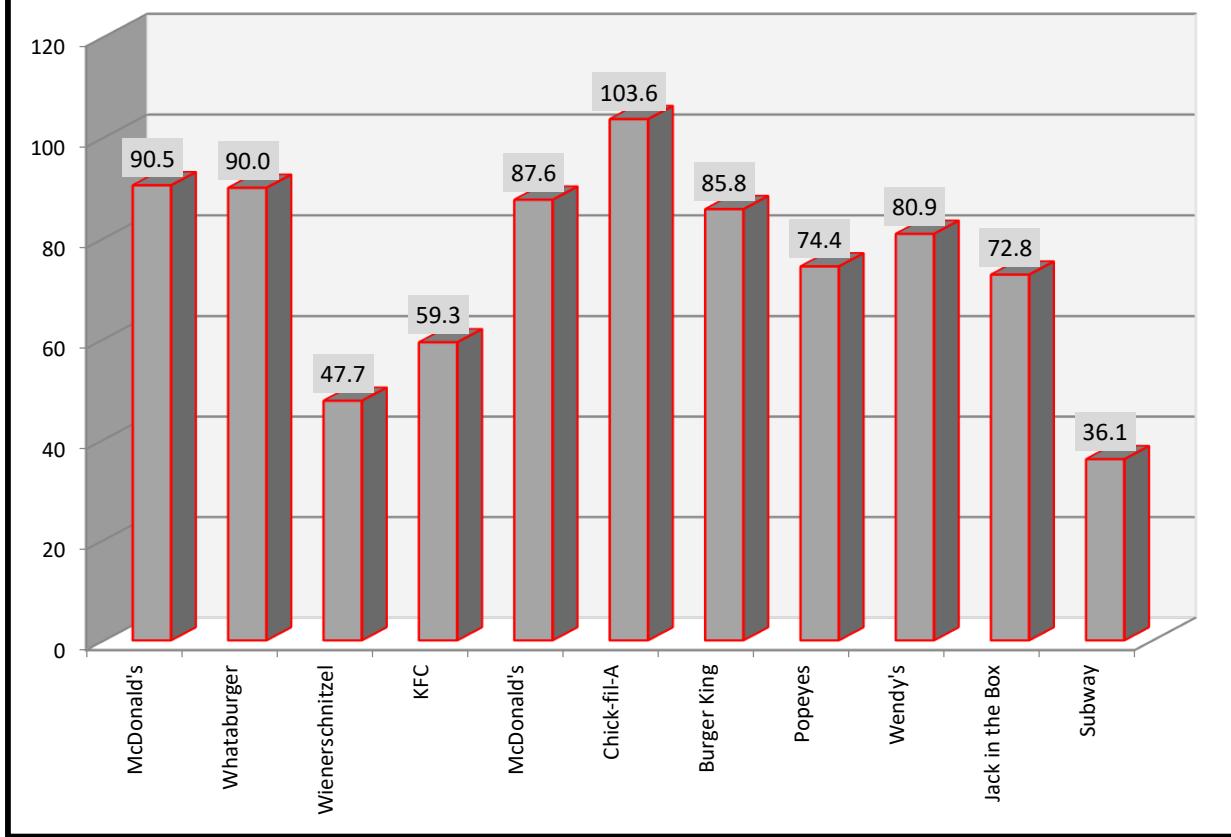
0.43	Average Distance Impact
0.17	Minimum Distance Impact
1.00	Maximum Distance Impact

Fast Food - Category

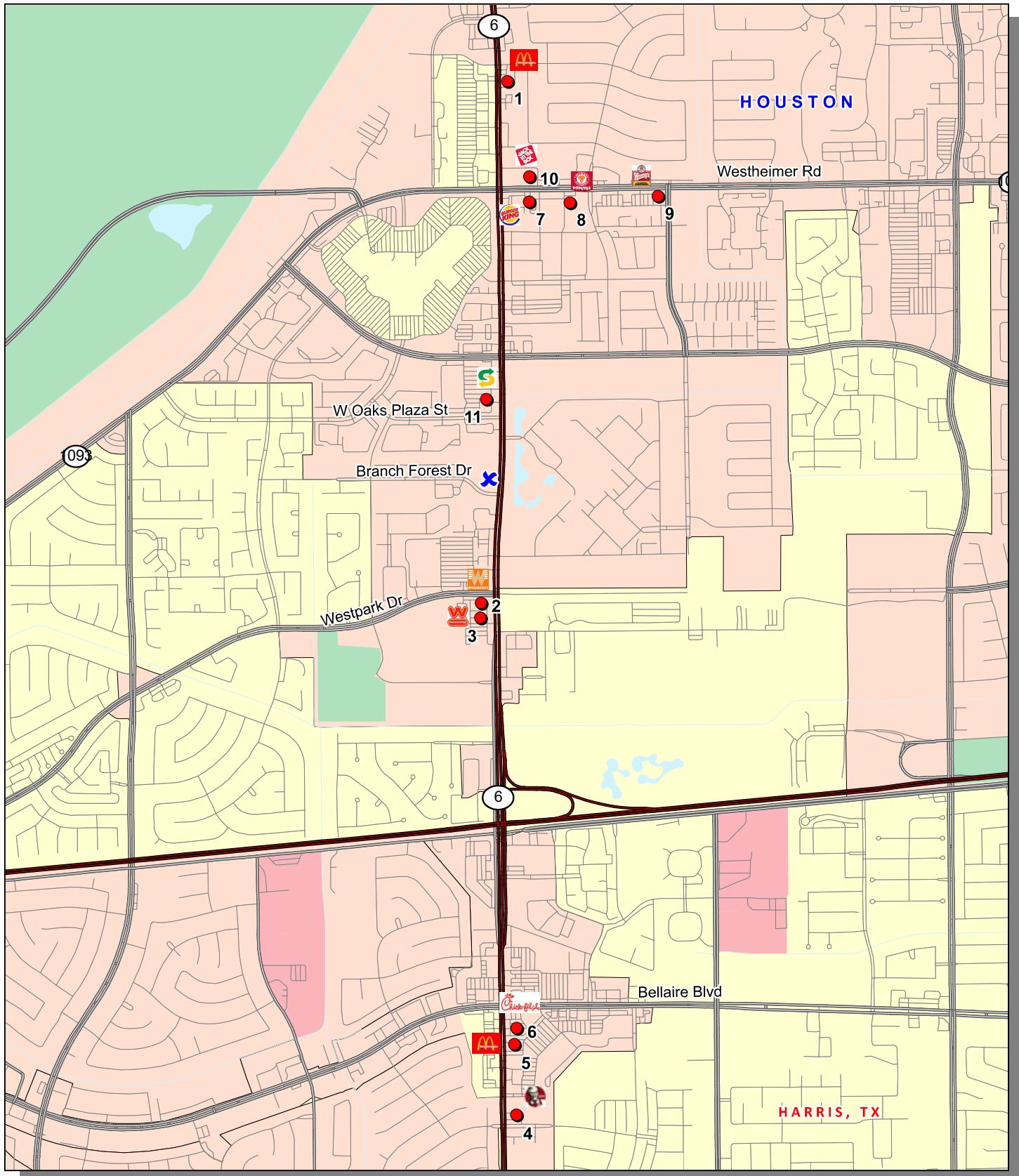
QSR - Burger	55%
QSR - Chicken	27%
QSR - Sandwich	9%
QSR - Mexican	0%
QSR - Breakfast	0%
QSR	9%

Audit Date: 4/29/2025

FFx Impact Scores



Competition



Competition Analysis: Fast Food

Name:	McDonald's	Operation:	Franchise	Map #:	1	
Location:	State Highway 6 and Piping Rock Lane			Intersection:	SE	
Type:	QSR-Burger			Distance:	1.1	

Fast Food Exterior				Competitive Fast Food Impact		
4,500	Fast Food Restaurant SF	3	# of Access Points	Fast Food Score	96.5	
Tier I Brand	Brand Recognition	Interior	Visibility	Brand Score	20	
5	Brand Sign Facings	Unregulated	Traffic Regulation	Distance Score	0.26	
Standard	Brand Image Compliance	Divided	Road Configuration			
63	Parking	Standard	On Site Movement			
Yes	Drive-Thru Service	40	Posted Speed			
Freestanding	QSR Building Type					

Fast Food Interior						
4	Order Stations	Brand	Interior Maintenance	Self Service	Fountain Beverage Service	
62	Interior Seats	Brand	Interior Lighting	Specialty	Coffee Service	
Partial	Menu Dayparts	Brand	Interior Signage	Standard	Restrooms	
No	24 Hours	X	Uniforms	X	Delivery	



Competition Analysis: Fast Food

Name:	Whataburger	Operation:	Franchise	Map #:	2	
Location:	State Highway 6 and Westpark Drive			Intersection:	SW	
Type:	QSR-Burger			Distance:	0.3	

Fast Food Exterior				Competitive Fast Food Impact		
3,500	Fast Food Restaurant SF	2	# of Access Points	Fast Food Score	93.3	
Tier I Brand	Brand Recognition	Intersection	Visibility	Brand Score	20	
6	Brand Sign Facings	Electronic	Traffic Regulation	Distance Score	0.95	
Standard	Brand Image Compliance	Divided	Road Configuration			
49	Parking	Standard	On Site Movement			
Yes	Drive-Thru Service	45	Posted Speed			
Freestanding	QSR Building Type					

Fast Food Interior						
3	Order Stations	Brand	Interior Maintenance	Self Service	Fountain Beverage Service	
86	Interior Seats	Brand	Interior Lighting	Standard	Coffee Service	
Full	Menu Dayparts	Brand	Interior Signage	Standard	Restrooms	
No	24 Hours	X	Uniforms	X	Delivery	



Competition Analysis: Fast Food

Name:	Wienerschnitzel	Operation:	Franchise	Map #:	3	 Wienerschnitzel
Location:	State Highway 6 and Westpark Drive			Intersection:	SW	
Type:	QSR			Distance:	0.4	

Fast Food Exterior				Competitive Fast Food Impact	
1,200	Fast Food Restaurant SF	3	# of Access Points	Fast Food Score	47.7
Regional Brand	Brand Recognition	Interior	Visibility	Brand Score	12
5	Brand Sign Facings	Unregulated	Traffic Regulation	Distance Score	0.71
Standard	Brand Image Compliance	Divided	Road Configuration		
32	Parking	Standard	On Site Movement		
Yes	Drive-Thru Service	45	Posted Speed		
Freestanding	QSR Building Type				

Fast Food Interior					
2	Order Stations	Brand	Interior Maintenance	Standard	Fountain Beverage Service
10	Interior Seats	Brand	Interior Lighting		Coffee Service
Partial	Menu Dayparts	Brand	Interior Signage		Restrooms
No	24 Hours	X	Uniforms		Delivery



Competition Analysis: Fast Food

Name:	KFC	Operation:	Franchise	Map #:	4	
Location:	State Highway 6 and Ranch Mission Drive			Intersection:	NE	
Type:	QSR-Chicken			Distance:	1.7	

Fast Food Exterior				Competitive Fast Food Impact	
2,000	Fast Food Restaurant SF	2	# of Access Points	Fast Food Score	59.3
Tier II Brand	Brand Recognition	Interior	Visibility	Brand Score	16
5	Brand Sign Facings	Unregulated	Traffic Regulation	Distance Score	0.17
Standard	Brand Image Compliance	Crossover	Road Configuration		
25	Parking	Standard	On Site Movement		
Yes	Drive-Thru Service	45	Posted Speed		
Freestanding	QSR Building Type				

Fast Food Interior					
2	Order Stations	Brand	Interior Maintenance	Standard	Fountain Beverage Service
40	Interior Seats	Brand	Interior Lighting	Standard	Coffee Service
Partial	Menu Dayparts	Brand	Interior Signage	Standard	Restrooms
No	24 Hours	X	Uniforms	Standard	Delivery



Competition Analysis: Fast Food

Name:	McDonald's	Operation:	Franchise	Map #:	5	
Location:	State Highway 6			Intersection:	E	
Type:	QSR-Burger			Distance:	1.5	

Fast Food Exterior				Competitive Fast Food Impact	
3,800	Fast Food Restaurant SF	3	# of Access Points	Fast Food Score	87.6
Tier I Brand	Brand Recognition	Interior	Visibility	Brand Score	20
5	Brand Sign Facings	Unregulated	Traffic Regulation	Distance Score	0.19
Standard	Brand Image Compliance	Divided	Road Configuration		
30	Parking	Standard	On Site Movement		
Yes	Drive-Thru Service	45	Posted Speed		
Freestanding	QSR Building Type				

Fast Food Interior					
5	Order Stations	Brand	Interior Maintenance	Self Service	Fountain Beverage Service
48	Interior Seats	Brand	Interior Lighting	Specialty	Coffee Service
Partial	Menu Dayparts	Brand	Interior Signage	Standard	Restrooms
No	24 Hours	X	Uniforms	X	Delivery



Competition Analysis: Fast Food

Name:	Chick-fil-A	Operation:	Direct	Map #:	6	
Location:	State Highway 6			Intersection:	E	
Type:	QSR-Chicken			Distance:	1.4	

Fast Food Exterior				Competitive Fast Food Impact	
4,700	Fast Food Restaurant SF	4	# of Access Points	Fast Food Score	103.6
Tier I Brand	Brand Recognition	Interior	Visibility	Brand Score	20
6	Brand Sign Facings	Unregulated	Traffic Regulation	Distance Score	0.20
Standard	Brand Image Compliance	Divided	Road Configuration		
72	Parking	Standard	On Site Movement		
Yes	Drive-Thru Service	45	Posted Speed		
Freestanding	QSR Building Type				

Fast Food Interior					
5	Order Stations	Brand	Interior Maintenance	Standard	Fountain Beverage Service
86	Interior Seats	Brand	Interior Lighting	Standard	Coffee Service
Full	Menu Dayparts	Brand	Interior Signage	Standard	Restrooms
No	24 Hours	X	Uniforms	X	Delivery



Competition Analysis: Fast Food

Name:	Burger King	Operation:	Franchise	Map #:	7	
Location:	Westheimer Road			Intersection:	S	
Type:	QSR-Burger			Distance:	0.9	

Fast Food Exterior				Competitive Fast Food Impact	
3,400	Fast Food Restaurant SF	4	# of Access Points	Fast Food Score	85.8
Tier I Brand	Brand Recognition	Interior	Visibility	Brand Score	20
5	Brand Sign Facings	Unregulated	Traffic Regulation	Distance Score	0.32
Standard	Brand Image Compliance	Crossover	Road Configuration		
41	Parking	Standard	On Site Movement		
Yes	Drive-Thru Service	40	Posted Speed		
Freestanding	QSR Building Type				

Fast Food Interior					
2	Order Stations	Brand	Interior Maintenance	Self Service	Fountain Beverage Service
50	Interior Seats	Brand	Interior Lighting	Standard	Coffee Service
Full	Menu Dayparts	Brand	Interior Signage	Standard	Restrooms
No	24 Hours	X	Uniforms	X	Delivery



Competition Analysis: Fast Food

Name:	Popeyes	Operation:	Franchise	Map #:	8	
Location:	Westheimer Road and Briargreen Drive			Intersection:	SW	
Type:	QSR-Chicken			Distance:	1	

Fast Food Exterior				Competitive Fast Food Impact	
3,000	Fast Food Restaurant SF	4	# of Access Points	Fast Food Score	75.4
Tier I Brand	Brand Recognition	Interior	Visibility	Brand Score	20
5	Brand Sign Facings	Unregulated	Traffic Regulation	Distance Score	0.29
Standard	Brand Image Compliance	Crossover	Road Configuration		
26	Parking	Standard	On Site Movement		
Yes	Drive-Thru Service	40	Posted Speed		
Freestanding	QSR Building Type				

Fast Food Interior					
3	Order Stations	Brand	Interior Maintenance	Standard	Fountain Beverage Service
38	Interior Seats	Brand	Interior Lighting		Coffee Service
Partial	Menu Dayparts	Brand	Interior Signage	Standard	Restrooms
No	24 Hours	X	Uniforms	X	Delivery



Competition Analysis: Fast Food

Name:	Wendy's	Operation:	Franchise	Map #:	9	
Location:	Westheimer Road and Westhollow Drive			Intersection:	SW	
Type:	QSR-Burger			Distance:	1.2	

Fast Food Exterior				Competitive Fast Food Impact	
3,500	Fast Food Restaurant SF	3	# of Access Points	Fast Food Score	86.5
Tier I Brand	Brand Recognition	Intersection	Visibility	Brand Score	20
5	Brand Sign Facings	Electronic	Traffic Regulation	Distance Score	0.24
Standard	Brand Image Compliance	Divided	Road Configuration		
28	Parking	Standard	On Site Movement		
Yes	Drive-Thru Service	40	Posted Speed		
Freestanding	QSR Building Type				

Fast Food Interior					
2	Order Stations	Brand	Interior Maintenance	Self Service	Fountain Beverage Service
44	Interior Seats	Brand	Interior Lighting	Standard	Coffee Service
Full	Menu Dayparts	Brand	Interior Signage	Standard	Restrooms
No	24 Hours	X	Uniforms	X	Delivery



Competition Analysis: Fast Food

Name:	Jack in the Box	Operation:	Franchise	Map #:	10	
Location:	Westheimer Road			Intersection:	NE	
Type:	QSR-Burger			Distance:	0.7	

Fast Food Exterior				Competitive Fast Food Impact	
2,500	Fast Food Restaurant SF	4	# of Access Points	Fast Food Score	73.8
Tier I Brand	Brand Recognition	Interior	Visibility	Brand Score	20
5	Brand Sign Facings	Unregulated	Traffic Regulation	Distance Score	0.41
Standard	Brand Image Compliance	Divided	Road Configuration		
37	Parking	Standard	On Site Movement		
Yes	Drive-Thru Service	40	Posted Speed		
Freestanding	QSR Building Type				

Fast Food Interior					
2	Order Stations	Brand	Interior Maintenance	Standard	Fountain Beverage Service
64	Interior Seats	Brand	Interior Lighting	Standard	Coffee Service
Full	Menu Dayparts	Brand	Interior Signage	Standard	Restrooms
No	24 Hours	X	Uniforms		Delivery



Competition Analysis: Fast Food

Name:	Subway	Operation:	Franchise	Map #:	11	
Location:	State Highway 6 and West Oaks Plaza Drive			Intersection:	NW	
Type:	QSR-Sandwich			Distance:	0.2	

Fast Food Exterior				Competitive Fast Food Impact	
1,000	Fast Food Restaurant SF	3	# of Access Points	Fast Food Score	38.1
Express Brand	Brand Recognition	Interior	Visibility	Brand Score	8
3	Brand Sign Facings	Unregulated	Traffic Regulation	Distance Score	1.00
Standard	Brand Image Compliance	Divided	Road Configuration		
3	Parking	Retail Center	On Site Movement		
No	Drive-Thru Service	45	Posted Speed		
Retail Center	QSR Building Type				

Fast Food Interior					
1	Order Stations	Brand	Interior Maintenance	Self Service	Fountain Beverage Service
26	Interior Seats	Brand	Interior Lighting		Coffee Service
Full	Menu Dayparts	Brand	Interior Signage	Standard	Restrooms
No	24 Hours	X	Uniforms		Delivery



Competitive Analysis Summary: Car Wash

Competitive Car Wash Capacity Metrics

8	Total Competitive Units
1.0	Average Distance in Miles
10	Total Car Wash Bays
3	Total Full Service Car Wash Bays
5	Total Automatic Car Wash Bays
	Total Wand Car Wash Bays

Car Wash Chains and Brands

Car Wash Performance and Impact Indicators

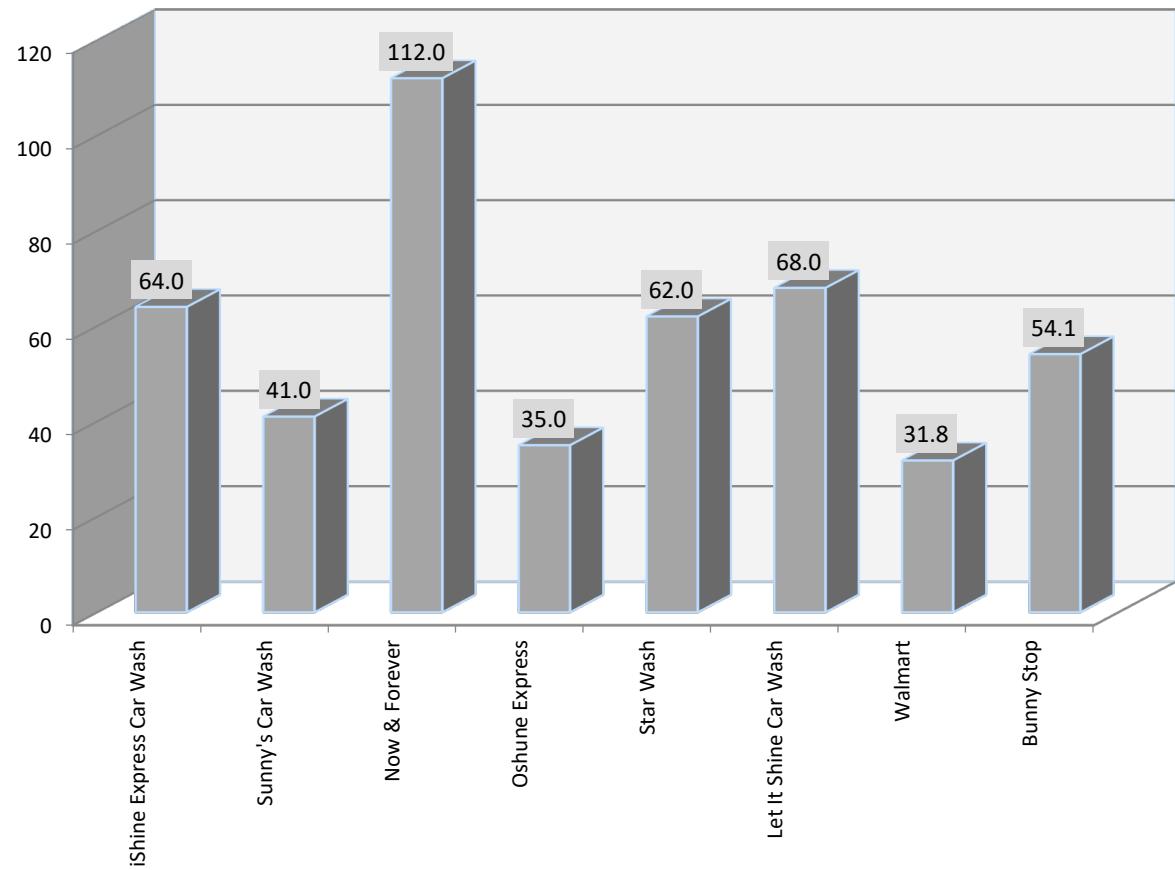
75%	Car Wash Units - Chain
50%	Car Wash Units - Fuel
50%	Car Wash Units - Attendants
0.41	Average Distance Impact
0.17	Minimum Distance Impact
0.95	Maximum Distance Impact

Car Wash - Bay Types

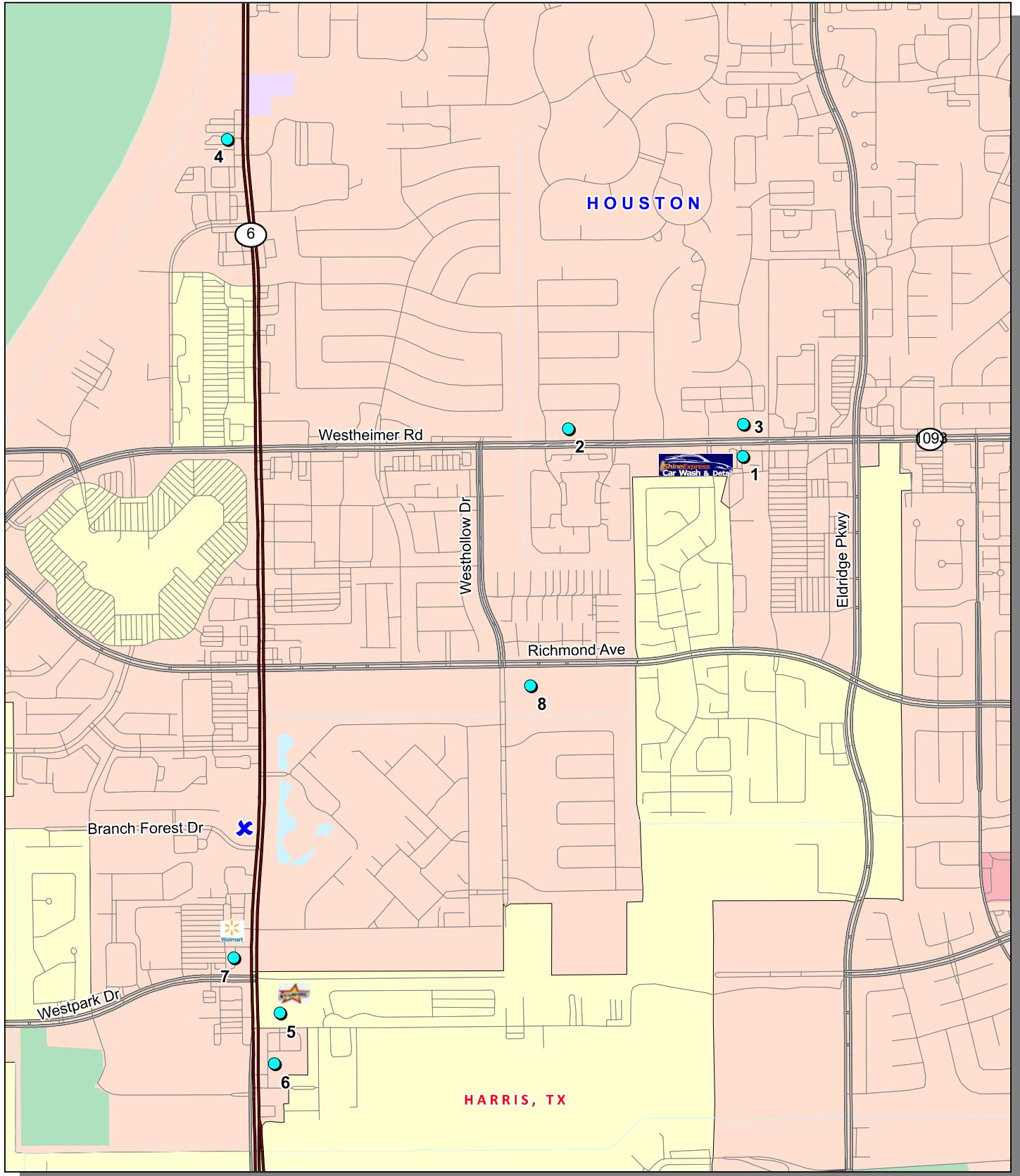
Full Service	30%
Conveyor	30%
Soft Touch	20%
Touchless	0%
Wand	0%

Audit Date: 4/29/2025

CWx Impact Scores



Competition



Competition Analysis: Car Wash

Name:	iShine Express Car Wash	Operation:	Car Wash Chain	Map #:	1	 iShine Express Car Wash & Detail
Location:	Westheimer Road	Intersection:	S			
Type:	Express Conveyor	Distance:	1.6			

Car Wash Capacity and Exterior			Competitive Car Wash Impact		
2	Number of Car Wash Bays	1	# of Access Points	CW Impact Score	64.0
CW Chain	Chain Recognition	Interior	Visibility	Distance Score	0.18
3	Chain Sign Facings	Unregulated	Traffic Regulation	Car Wash Price Schedule	
	Full Service Bays	Divided	Road Configuration	Economy	\$7.00
2	Conveyor Bays	Standard	On Site Movement	Good	\$10.00
	Soft Touch Bays	40	Posted Speed	Better	\$13.00
	Touchless Bays		Fuel Dispensers	Best	\$16.00
	Wand Bays		Convenience Store	Wand Cycle	
2	Transaction Stations		Quick Lube Bays		

Car Wash Amenities and Services					
x	Attendants	CW Chain	Exterior Maintenance	Full Service	Detail Area
16	Vacuum Stations	CW Chain	Exterior Lighting	x	Unlimited Wash Promo
Free	Vacuum Vending	CW Chain	Exterior Signage		Wash Cross Promo



Competition Analysis: Car Wash

Name:	Sunny's Car Wash	Operation:	Independent	Map #:	2	
Location:	Westheimer Road			Intersection:	N	
Type:	Full Service			Distance:	1.4	

Car Wash Capacity and Exterior			Competitive Car Wash Impact		
1	Number of Car Wash Bays	1	# of Access Points	CW Impact Score	41.0
Independent	Chain Recognition	Interior	Visibility	Distance Score	0.20
3	Chain Sign Facings	Unregulated	Traffic Regulation		
1	Full Service Bays	Divided	Road Configuration		
	Conveyor Bays	Standard	On Site Movement		
	Soft Touch Bays	40	Posted Speed		
	Touchless Bays		Fuel Dispensers		
	Wand Bays		Convenience Store		
1	Transaction Stations		Quick Lube Bays		

Car Wash Amenities and Services

x	Attendants	Independent	Exterior Maintenance	Detail Area
8	Vacuum Stations	Independent	Exterior Lighting	x Unlimited Wash Promo
Free	Vacuum Vending	Independent	Exterior Signage	Wash Cross Promo



Competition Analysis: Car Wash

Name:	Now & Forever	Operation:	CS Chain	Map #:	3	
Location:	Westheimer Road and Windchase Boulevard	Intersection:	NE			
Type:	Express Conveyor	Distance:	1.7			

Car Wash Capacity and Exterior			Competitive Car Wash Impact		
1	Number of Car Wash Bays	1	# of Access Points		
CS Chain	Chain Recognition	Intersection	Visibility		
3	Chain Sign Facings	Electronic	Traffic Regulation		
	Full Service Bays	Crossover	Road Configuration		
1	Conveyor Bays	Standard	On Site Movement		
	Soft Touch Bays	40	Posted Speed		
	Touchless Bays	18	Fuel Dispensers		
	Wand Bays	6,000	Convenience Store		
1	Transaction Stations		Quick Lube Bays		
Car Wash Price Schedule					
			Economy		
			Good		
			Better		
			Best		
			Wand Cycle		

Car Wash Amenities and Services					
	Attendants	CS Chain	Exterior Maintenance	Detail Area	
39	Vacuum Stations	CS Chain	Exterior Lighting	x	Unlimited Wash Promo
Free	Vacuum Vending	CS Chain	Exterior Signage	x	Wash Cross Promo



Competition Analysis: Car Wash

Name:	Oshune Express	Operation:	Independent	Map #:	4	
Location:	State Highway 6			Intersection:	W	
Type:	Full Service			Distance:	1.4	

Car Wash Capacity and Exterior			Competitive Car Wash Impact		
2	Number of Car Wash Bays	2	# of Access Points	CW Impact Score	35.0
Independent	Chain Recognition	Interior	Visibility	Distance Score	0.20
2	Chain Sign Facings	Unregulated	Traffic Regulation		
2	Full Service Bays	Divided	Road Configuration		
	Conveyor Bays	Standard	On Site Movement		
	Soft Touch Bays	40	Posted Speed		
	Touchless Bays		Fuel Dispensers		
	Wand Bays		Convenience Store		
4	Transaction Stations	2	Quick Lube Bays		

Car Wash Amenities and Services					
x	Attendants	Independent	Exterior Maintenance	Full Service	Detail Area
	Vacuum Stations	Independent	Exterior Lighting		Unlimited Wash Promo
	Vacuum Vending	Independent	Exterior Signage		Wash Cross Promo



Competition Analysis: Car Wash

Name:	Star Wash	Operation:	CS Chain	Map #:	5	
Location:	State Highway 6 and Schiller Road			Intersection:	NE	
Type:	Express Conveyor			Distance:	0.4	

Car Wash Capacity and Exterior			Competitive Car Wash Impact		
20	Number of Car Wash Bays	3	# of Access Points	CW Impact Score	100.0
CS Chain	Chain Recognition	Intersection	Visibility	Distance Score	0.71
5	Chain Sign Facings	Electronic	Traffic Regulation		
	Full Service Bays	Divided	Road Configuration		
20	Conveyor Bays	Standard	On Site Movement		
	Soft Touch Bays	40	Posted Speed		
	Touchless Bays	10	Fuel Dispensers		
	Wand Bays	7,000	Convenience Store		
2	Transaction Stations		Quick Lube Bays		

Car Wash Amenities and Services

	Attendants	CS Chain	Exterior Maintenance	Detail Area
3	Vacuum Stations	CS Chain	Exterior Lighting	Unlimited Wash Promo
Pay	Vacuum Vending	CS Chain	Exterior Signage	Wash Cross Promo



Competition Analysis: Car Wash

Name:	Let It Shine Car Wash	Operation:	Car Wash Chain	Map #:	6	
Location:	State Highway 6 and Schiller Road			Intersection:	SE	
Type:	Express Conveyor			Distance:	0.5	

Car Wash Capacity and Exterior			Competitive Car Wash Impact		
1	Number of Car Wash Bays	2	# of Access Points		
CW Chain	Chain Recognition	Interior	Visibility		
5	Chain Sign Facings	Unregulated	Traffic Regulation		
1	Full Service Bays	Divided	Road Configuration		
	Conveyor Bays	Standard	On Site Movement		
	Soft Touch Bays	40	Posted Speed		
	Touchless Bays		Fuel Dispensers		
	Wand Bays		Convenience Store		
2	Transaction Stations		Quick Lube Bays		

Car Wash Amenities and Services

x	Attendants	CW Chain	Exterior Maintenance	Detail Area
24	Vacuum Stations	CW Chain	Exterior Lighting	x Unlimited Wash Promo
Free	Vacuum Vending	CW Chain	Exterior Signage	Wash Cross Promo



Competition Analysis: Car Wash

Name:	Walmart	Operation:	CS Chain	Map #:	7	
Location:	State Highway 6 and Westpark Drive			Intersection:	NW	
Type:	Soft Touch			Distance:	0.3	

Car Wash Capacity and Exterior			Competitive Car Wash Impact		
1	Number of Car Wash Bays	1	# of Access Points		
CS Chain	Chain Recognition	Intersection	Visibility		
3	Chain Sign Facings	Electronic	Traffic Regulation		
	Full Service Bays	Divided	Road Configuration		
	Conveyor Bays	Standard	On Site Movement		
1	Soft Touch Bays	45	Posted Speed		
	Touchless Bays	6	Fuel Dispensers		
	Wand Bays	150	Convenience Store		
1	Transaction Stations		Quick Lube Bays		
Car Wash Price Schedule					
			Economy	\$8.00	
			Good	\$10.00	
			Better	\$12.00	
			Best		
			Wand Cycle		

Car Wash Amenities and Services					
Attendants	CS Chain	Exterior Maintenance		Detail Area	
Vacuum Stations	CS Chain	Exterior Lighting		Unlimited Wash Promo	
Vacuum Vending	CS Chain	Exterior Signage		Wash Cross Promo	



Competition Analysis: Car Wash

Name:	Bunny Stop	Operation:	CS Chain	Map #:	8	
Location:	Richmond Road and Westhollow Drive			Intersection:	SW	
Type:	Soft Touch			Distance:	0.9	

Car Wash Capacity and Exterior			Competitive Car Wash Impact		
1	Number of Car Wash Bays	1	# of Access Points	CW Impact Score	54.1
CS Chain	Chain Recognition	Intersection	Visibility	Distance Score	0.32
3	Chain Sign Facings	Electronic	Traffic Regulation		
	Full Service Bays	Divided	Road Configuration		
	Conveyor Bays	Standard	On Site Movement		
1	Soft Touch Bays	35	Posted Speed		
	Touchless Bays	10	Fuel Dispensers		
	Wand Bays	5,800	Convenience Store		
1	Transaction Stations		Quick Lube Bays		

Car Wash Amenities and Services					
	Attendants	CS Chain	Exterior Maintenance		Detail Area
3	Vacuum Stations	CS Chain	Exterior Lighting		Unlimited Wash Promo
Pay	Vacuum Vending	CS Chain	Exterior Signage		Wash Cross Promo



Competitive Analysis Summary: Washateria

Competitive Washateria Metrics

4	Total Competitive Washateria Units
1.5	Average Distance in Miles
83	Total # of Parking Spaces
142	Total # of Washing Machines
205	Total # of Dryers
3,725	Total Washateria Square Feet

Washateria Chains

Independent

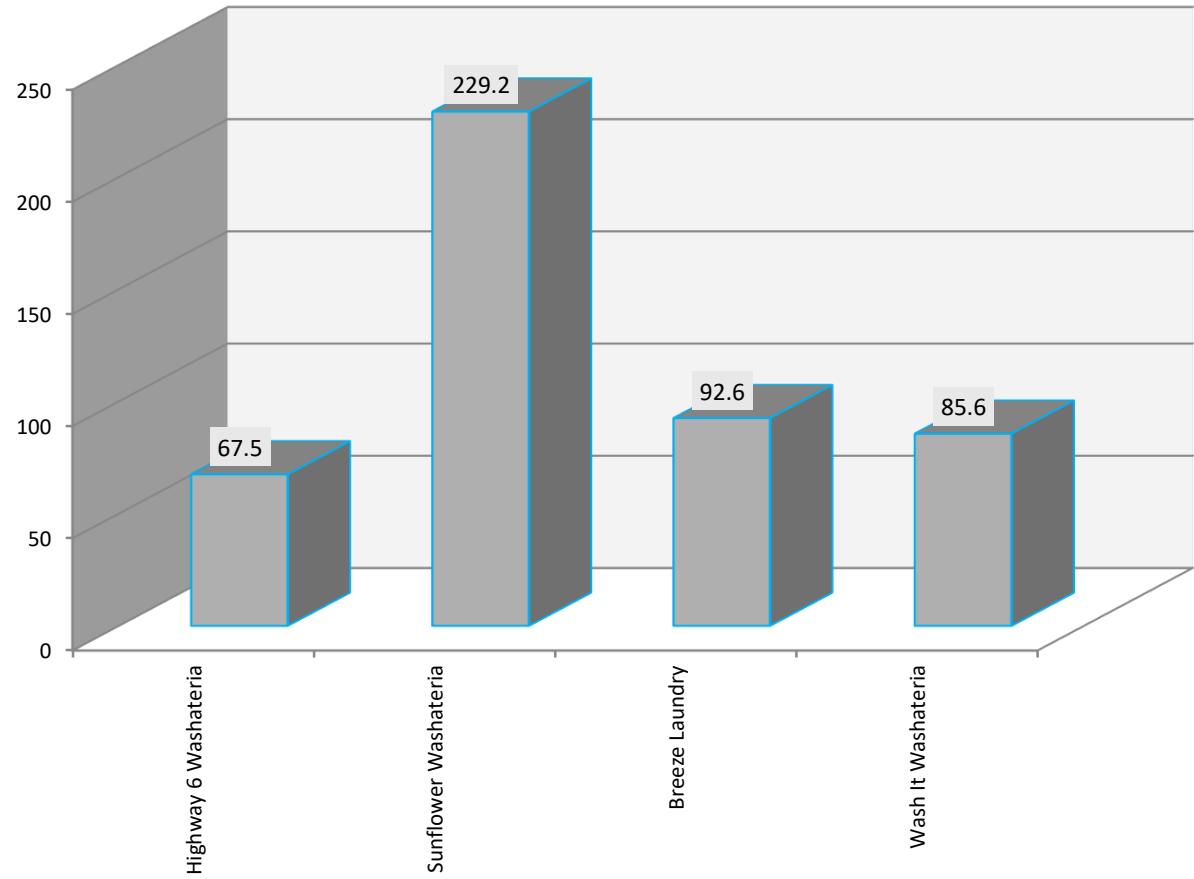
Washateria Amenities and Impact

100%	Percent Attended
100%	Wash and Fold

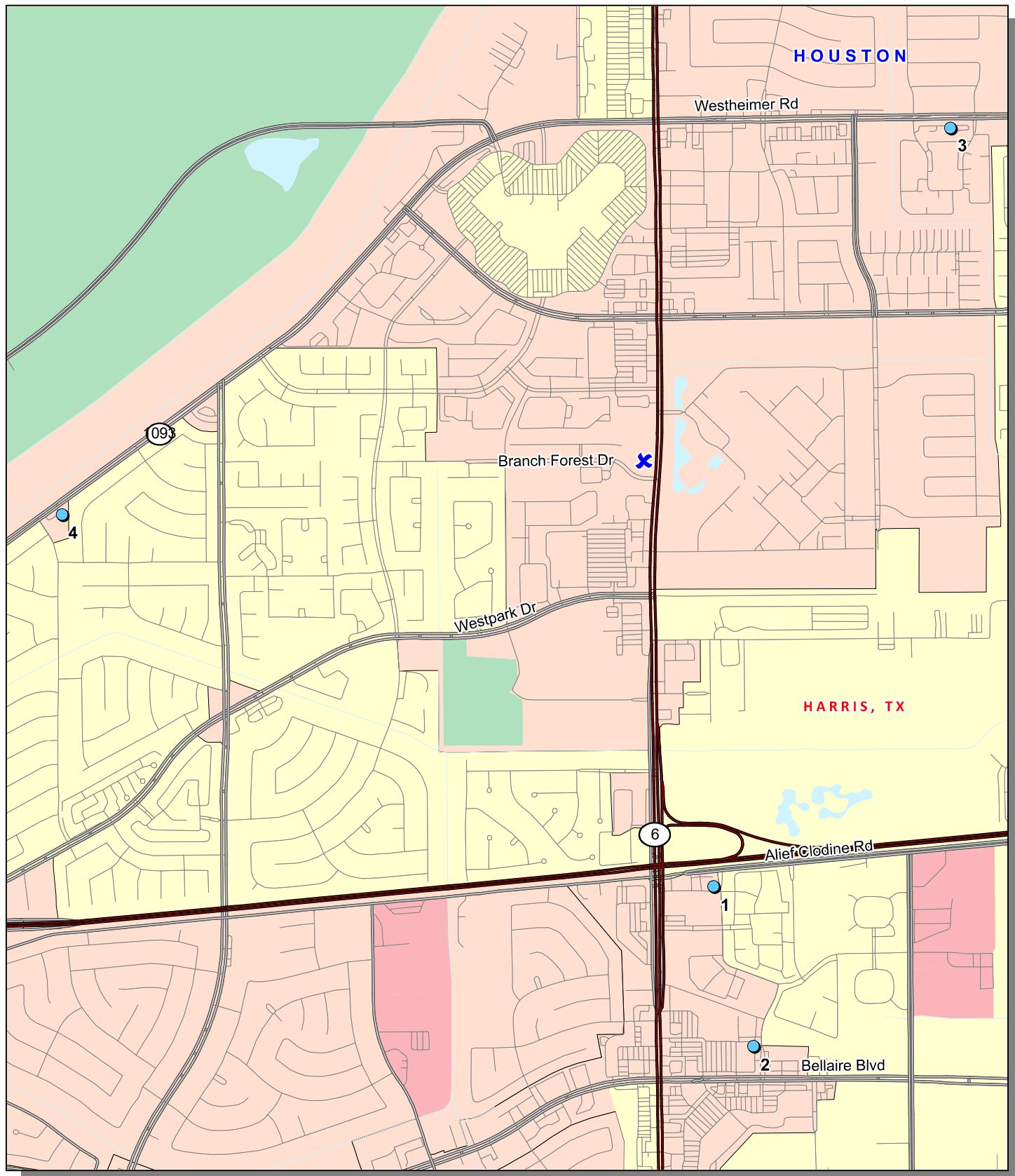
0.18	Minimum Distance Impact
0.29	Maximum Distance Impact

Audit Date: 4/29/2025

Washateria Impact Scores



Competition Map



Competition Analysis: Washateria

Name:	Highway 6 Washateria	Operation:	Independent	Map #:	1	
Location:	Sierra Blanca Dr and Alien Clodine Road			Distance:	1.0	

Washateria Capacity and Amenities		Competitive Washateria Impact	
11	# of Parking Spaces	Washateria Impact Score	67.5
30	# of Washing Machines	Distance Score	0.29
28	# of Dryers		

x Attendant
x Wash and Fold

- Chain

2,000 Washateria Square Feet



Name:	Sunflower Washateria	Operation:	Independent	Map #:	2	
Location:	Tres Lagunas Drive and Bellaire Boulevard			Distance:	1.6	

Washateria Capacity and Amenities		Competitive Washateria Impact	
39	# of Parking Spaces	Washateria Impact Score	229.2
60	# of Washing Machines	Distance Score	0.18
104	# of Dryers		

x Attendant
x Wash and Fold

- Chain

7,500 Washateria Square Feet



Competition Analysis: Washateria

Name:	Breeze Laundry	Operation:	Independent	Map #:	3	
Location:	Westheimer Road and Joel Wheaton Road			Distance:	1.5	

Washateria Capacity and Amenities		Competitive Washateria Impact	
12	# of Parking Spaces	Washateria Impact Score	92.6
37	# of Washing Machines	Distance Score	0.19
42	# of Dryers		

x	Attendant
x	Wash and Fold
-	Chain
3,100	Washateria Square Feet



Name:	Wash It Washateria	Operation:	Independent	Map #:	4	
Location:	Westheimer Road and Vineyard Drive			Distance:	1.7	

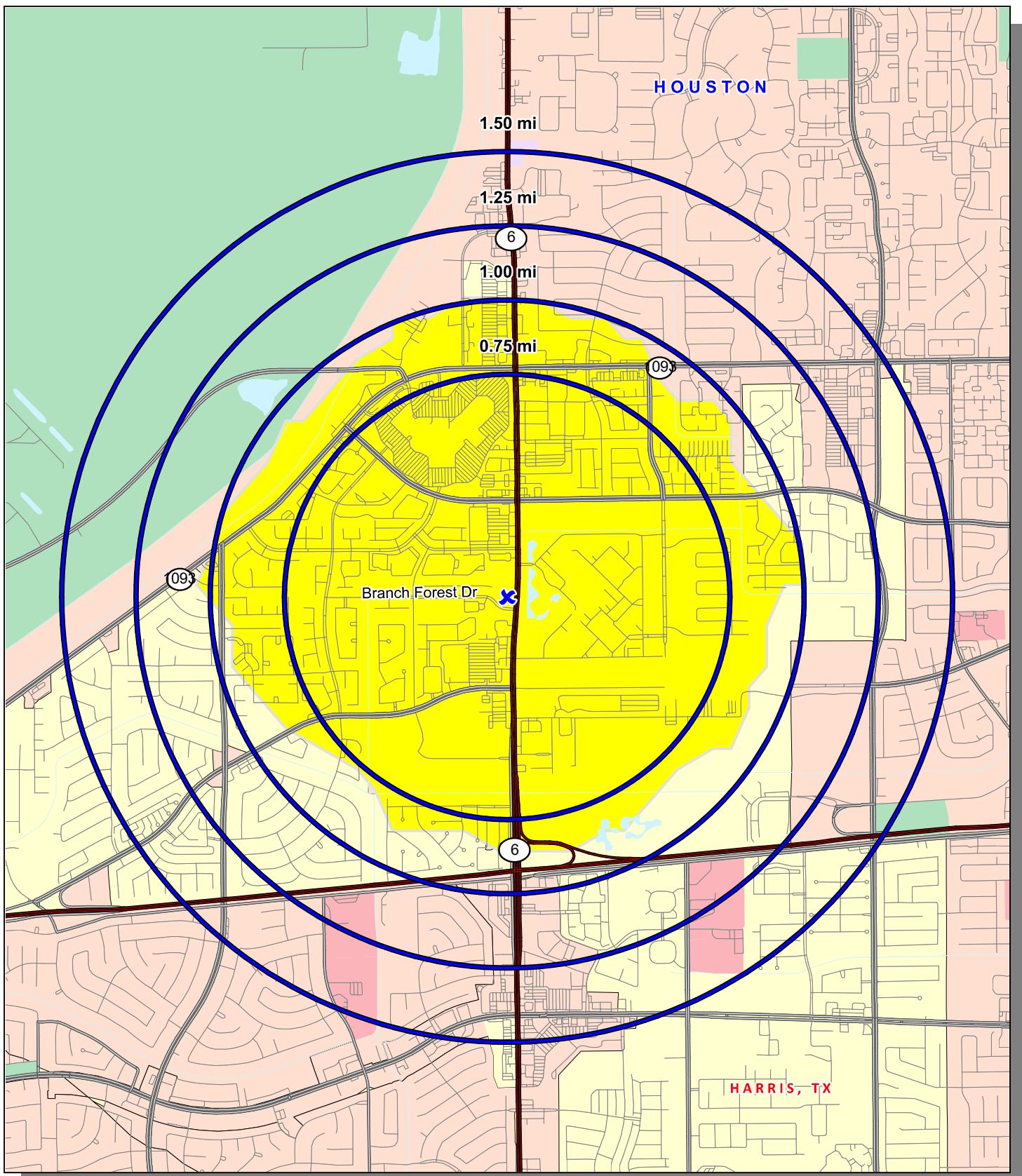
Washateria Capacity and Amenities		Competitive Washateria Impact	
21	# of Parking Spaces	Washateria Impact Score	85.6
15	# of Washing Machines	Distance Score	0.17
31	# of Dryers		

x	Attendant
x	Wash and Fold
-	Chain
2,300	Washateria Square Feet



**Trade Area Map
0.75-, 1-, 1.25-, and 1.5-Mile Rings**

**State Highway 6 and Branch Forest Drive
Houston, Texas 77082**



✗ = Site

■ = Custom Boundary

Demand Report

Location:

State Highway 6 and Branch Forest Drive
Houston, Texas 77082

CUSTOM
BOUNDARY
2.62 SQ/MI

POPULATION TREND

	CUSTOM BOUNDARY 2.62 SQ/MI
2020 Total Population	13,436
2023 Total Population	13,303
2028 Total Population	13,662
% Population Change 2010 to 2020	23.4%
% Population Change 2010 to 2023	22.2%
% Population Change 2020 to 2028	1.7%
% Population Change 2023 to 2028	2.7%
2023 Total Daytime Population	12,220
2023 Total Employees	6,602
2023 Total Daytime at Home Population	6,518
2023 Total Employees (% of Daytime Population)	50.3%
2023 Total Daytime at Home Population (% of Daytime Pop)	49.7%

DENSITY

2023 Population Density	4,723
2023 Employee Density	2,371

HOUSEHOLDS TREND

2020 Households	5,292
2023 Households	5,337
2028 Households	5,344
% Household Change 2010 to 2020	20.1%
% Household Change 2010 to 2023	21.1%
% Household Change 2020 to 2028	1.0%
% Household Change 2023 to 2028	.1%
2023 Average household size	2.5
2023 Average household size: Owner occupied	0.9
2023 Average household size: Renter occupied	1.6

INCOME

2020 Household income: Average	\$79,289
2020 Household income: Median	\$60,429
2023 Household income: Median	\$66,150
2023 Household income: Average	\$87,726
2028 Household income: Median	\$79,861
2028 Household income: Average	\$105,983

HOUSEHOLD VEHICLES

2023 Households: Number of vehicles available	9,123
2023 Owner occupied: Number of vehicles available	3,660
2023 Renter occupied: Number of vehicles available	5,518

Demand Report

Location:

State Highway 6 and Branch Forest Drive
Houston, Texas 77082

CUSTOM
BOUNDARY
2.62 SQ/MI

RACE & ETHNICITY	
% 2023 White alone	17.1%
% 2023 Black or African American alone	46.4%
% 2023 American Indian and Alaska Native alone	.6%
% 2023 Asian alone	13.7%
% 2023 Native Hawaiian and OPI alone	.1%
% 2023 Some Other Race alone	9.6%
% 2023 Two or More Races alone	12.5%
% 2023 Hispanic	24.2%
% 2023 Not Hispanic	75.8%
EDUCATION & OCCUPATION	
Education	
% 2023 No High School Diploma	11.0%
% 2023 High school graduate, GED, or alternative	29.2%
% 2023 College No Degree	23.3%
% 2023 College Degree	27.1%
% 2023 Advanced Degree	9.4%
% 2023 College or Advanced Degree	36.5%
Occupation	
% 2020 Occupation: White collar	54.1%
% 2020 Occupation: Blue collar	45.9%
% 2023 Occupation: White collar	53.7%
% 2023 Occupation: Blue collar	46.3%
AGE & OCCUPANCY	
Age	
2023 Total population: Median age	35
2023 Male population: Median age	33
2023 Female population: Median age	36
Occupancy	
2023 HouseHolds	5,337
% 2023 Owner occupied housing units	32.2%
% 2023 Renter occupied housing units	68.6%

Demand Report

Location:

State Highway 6 and Branch Forest Drive
Houston, Texas 77082

CUSTOM
BOUNDARY
2.62 SQ/MI

RETAIL SALES POTENTIAL	
2022 Convenience stores	\$7,269,865
2022 Gasoline stations with convenience stores	\$15,948,555
2022 Beer, wine, & liquor stores	\$1,835,015
2022 Supermarkets & other grocery (except convenience) stores	\$31,184,224
2022 Restaurant Expenditures	\$5,318,607
HOUSEHOLD EXPENDITURES	
Automotive	
2023 Gasoline (Household Average)	\$2,122
2023 Diesel fuel (Household Average)	\$54
2023 Gasoline on out-of-town trips (Household Average)	\$132
2023 Lube, oil change, and oil filters (Household Average)	\$116
2023 Maintenance and repairs (Household Average)	\$1,031
2023 Vehicle products and cleaning services (Household Average)	\$9
2023 Electric vehicle charging (Household Average)	\$1
Food/Alcohol/Tobacco	
2023 Food at home	\$30,139,991
2023 Food at home (Household Average)	\$5,647
2023 Food away from home (Household Average)	\$3,263
2023 Meals at restaurants, carry outs and other (Household Average)	\$2,799
2023 Breakfast and brunch (Household Average)	\$294
2023 Lunch (Household Average)	\$813
2023 Dinner (Household Average)	\$1,472
2023 Alcoholic beverages	\$3,031,230
2023 Alcoholic beverages (Household Average)	\$568
2023 At home (Household Average)	\$310
2023 Away from home (Household Average)	\$258
2023 Beer and ale	\$619,470
2023 Beer and ale (Household Average)	\$77
2023 Wine	\$734,891
2023 Wine (Household Average)	\$46
2023 Other alcoholic beverages	\$176,616
2023 Other alcoholic beverages (Household Average)	\$67
2023 Tobacco products and smoking supplies	\$1,940,934
2023 Tobacco products and smoking supplies (Household Average)	\$364
2023 Cigarettes	\$1,593,390
2023 Cigarettes (Household Average)	\$299
2023 Other tobacco products	\$322,884
2023 Other tobacco products (Household Average)	\$60
2023 Smoking accessories	\$24,660
2023 Smoking accessories (Household Average)	\$5

Demand Report

Location:

State Highway 6 and Branch Forest Drive
Houston, Texas 77082

	0.75 MILE RING 1.77 SQ/MI	1 MILE RING 3.14 SQ/MI	1.25 MILE RING 4.91 SQ/MI	1.5 MILE RING 7.07 SQ/MI
POPULATION TREND				
2020 Total Population	7,298	15,947	24,628	34,187
2023 Total Population	7,255	15,917	24,664	33,990
2028 Total Population	7,530	16,347	25,247	34,587
% Population Change 2010 to 2020	26.6%	22.8%	19.5%	14.3%
% Population Change 2010 to 2023	25.9%	22.6%	19.7%	13.6%
% Population Change 2020 to 2028	3.2%	2.5%	2.5%	1.2%
% Population Change 2023 to 2028	3.8%	2.7%	2.4%	1.8%
2023 Total Daytime Population	7,467	14,195	20,628	28,967
2023 Total Employees	4,543	7,357	8,896	12,658
2023 Total Daytime at Home Population	3,637	8,006	12,631	17,958
2023 Total Employees (% of Daytime Population)	55.5%	47.9%	41.3%	41.3%
2023 Total Daytime at Home Population (% of Daytime Pop)	44.5%	52.1%	58.7%	58.7%
DENSITY				
2023 Population Density	4,057	5,088	5,830	5,343
2023 Employee Density	2,341	2,328	2,041	1,916
HOUSEHOLDS TREND				
2020 Households	2,864	6,236	9,164	12,182
2023 Households	2,905	6,339	9,333	12,318
2028 Households	2,932	6,350	9,325	12,253
% Household Change 2010 to 2020	23.1%	20.1%	18.6%	13.7%
% Household Change 2010 to 2023	24.9%	22.0%	20.8%	15.0%
% Household Change 2020 to 2028	2.4%	1.8%	1.8%	.6%
% Household Change 2023 to 2028	.9%	.2%	-.1%	-.5%
2023 Average household size	2.4	2.5	2.6	2.7
2023 Average household size: Owner occupied	0.9	0.9	1.0	1.2
2023 Average household size: Renter occupied	1.5	1.6	1.6	1.5
INCOME				
2020 Household income: Average	\$73,530	\$76,628	\$75,200	\$82,214
2020 Household income: Median	\$60,613	\$59,289	\$57,579	\$59,665
2023 Household income: Median	\$65,534	\$65,409	\$64,426	\$65,724
2023 Household income: Average	\$79,896	\$85,433	\$84,970	\$92,917
2028 Household income: Median	\$77,475	\$78,725	\$77,443	\$79,559
2028 Household income: Average	\$97,204	\$103,749	\$103,387	\$113,955
HOUSEHOLD VEHICLES				
2023 Households: Number of vehicles available	4,870	10,793	16,200	22,331
2023 Owner occupied: Number of vehicles available	1,888	4,393	7,166	11,563
2023 Renter occupied: Number of vehicles available	2,947	6,398	9,024	10,851

Demand Report

Location:

State Highway 6 and Branch Forest Drive
Houston, Texas 77082

	0.75 MILE RING 1.77 SQ/MI	1 MILE RING 3.14 SQ/MI	1.25 MILE RING 4.91 SQ/MI	1.5 MILE RING 7.07 SQ/MI
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RACE & ETHNICITY				
% 2023 White alone	17.4%	17.5%	18.3%	20.1%
% 2023 Black or African American alone	44.4%	45.0%	40.4%	35.8%
% 2023 American Indian and Alaska Native alone	.5%	.7%	.9%	.9%
% 2023 Asian alone	16.3%	12.7%	12.9%	14.8%
% 2023 Native Hawaiian and OPI alone	.1%	.1%	.1%	.1%
% 2023 Some Other Race alone	9.7%	10.9%	12.9%	13.7%
% 2023 Two or More Races alone	11.6%	13.0%	14.6%	14.8%
% 2023 Hispanic	23.0%	26.5%	30.8%	31.8%
% 2023 Not Hispanic	77.0%	73.5%	69.2%	68.2%
EDUCATION & OCCUPATION				
Education				
% 2023 No High School Diploma	7.5%	12.5%	14.3%	15.5%
% 2023 High school graduate, GED, or alternative	31.9%	29.0%	27.4%	25.6%
% 2023 College No Degree	29.5%	23.2%	22.4%	21.0%
% 2023 College Degree	21.0%	26.8%	26.9%	28.0%
% 2023 Advanced Degree	10.1%	8.5%	9.0%	9.8%
% 2023 College or Advanced Degree	31.1%	35.3%	35.8%	37.8%
Occupation				
% 2020 Occupation: White collar	56.1%	52.8%	51.4%	52.2%
% 2020 Occupation: Blue collar	43.9%	47.2%	48.6%	47.8%
% 2023 Occupation: White collar	55.9%	52.4%	50.9%	51.7%
% 2023 Occupation: Blue collar	44.1%	47.6%	49.1%	48.3%
AGE & OCCUPANCY				
Age				
2023 Total population: Median age	35	35	35	35
2023 Male population: Median age	34	33	33	33
2023 Female population: Median age	37	36	36	36
Occupancy				
2023 HouseHolds	2,905	6,339	9,333	12,318
% 2023 Owner occupied housing units	31.6%	33.2%	35.5%	42.1%
% 2023 Renter occupied housing units	67.8%	67.0%	64.5%	58.0%

Demand Report

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RETAIL SALES POTENTIAL				
2022 Convenience stores	\$3,814,470	\$8,520,169	\$12,442,309	\$16,992,916
2022 Gasoline stations with convenience stores	\$8,367,427	\$18,700,294	\$27,312,419	\$37,322,499
2022 Beer, wine, & liquor stores	\$981,086	\$2,143,081	\$3,125,452	\$4,325,797
2022 Supermarkets & other grocery (except convenience) stores	\$16,476,627	\$36,530,629	\$53,314,535	\$73,133,954
2022 Restaurant Expenditures	\$2,826,746	\$6,217,903	\$9,077,777	\$12,527,048
HOUSEHOLD EXPENDITURES				
Automotive				
2023 Gasoline (Household Average)	\$2,102	\$2,125	\$2,137	\$2,158
2023 Diesel fuel (Household Average)	\$54	\$55	\$55	\$57
2023 Gasoline on out-of-town trips (Household Average)	\$130	\$132	\$132	\$134
2023 Lube, oil change, and oil filters (Household Average)	\$115	\$116	\$116	\$117
2023 Maintenance and repairs (Household Average)	\$1,022	\$1,031	\$1,035	\$1,045
2023 Vehicle products and cleaning services (Household Average)	\$9	\$9	\$9	\$9
2023 Electric vehicle charging (Household Average)	\$1	\$1	\$1	\$1
Food/Alcohol/Tobacco				
2023 Food at home	\$16,276,076	\$35,830,000	\$53,055,566	\$70,870,489
2023 Food at home (Household Average)	\$5,603	\$5,652	\$5,685	\$5,753
2023 Food away from home (Household Average)	\$3,230	\$3,263	\$3,277	\$3,320
2023 Meals at restaurants, carry outs and other (Household Average)	\$2,772	\$2,799	\$2,812	\$2,846
2023 Breakfast and brunch (Household Average)	\$292	\$294	\$295	\$297
2023 Lunch (Household Average)	\$806	\$814	\$818	\$828
2023 Dinner (Household Average)	\$1,456	\$1,471	\$1,478	\$1,497
2023 Alcoholic beverages	\$1,634,118	\$3,596,944	\$5,313,238	\$7,122,942
2023 Alcoholic beverages (Household Average)	\$563	\$567	\$569	\$578
2023 At home (Household Average)	\$307	\$310	\$312	\$317
2023 Away from home (Household Average)	\$256	\$258	\$258	\$261
2023 Beer and ale	\$335,141	\$736,359	\$1,088,877	\$1,452,694
2023 Beer and ale (Household Average)	\$77	\$77	\$77	\$78
2023 Wine	\$394,668	\$872,149	\$1,291,587	\$1,747,813
2023 Wine (Household Average)	\$45	\$46	\$46	\$47
2023 Other alcoholic beverages	\$95,576	\$209,799	\$309,851	\$413,377
2023 Other alcoholic beverages (Household Average)	\$66	\$67	\$66	\$67
2023 Tobacco products and smoking supplies	\$1,054,676	\$2,306,591	\$3,397,855	\$4,475,920
2023 Tobacco products and smoking supplies (Household Average)	\$363	\$364	\$364	\$363
2023 Cigarettes	\$866,465	\$1,893,904	\$2,790,455	\$3,674,318
2023 Cigarettes (Household Average)	\$298	\$299	\$299	\$298
2023 Other tobacco products	\$174,717	\$383,323	\$564,236	\$745,413
2023 Other tobacco products (Household Average)	\$60	\$60	\$60	\$61
2023 Smoking accessories	\$13,494	\$29,363	\$43,165	\$56,188
2023 Smoking accessories (Household Average)	\$5	\$5	\$5	\$5

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POPULATION OVERVIEW				
Population Trend				
2010 Total population	5,763	12,988	20,608	29,917
2020 Total population	7,298	15,947	24,628	34,187
2023 Total Population	7,255	15,917	24,664	33,990
2028 Total Population	7,530	16,347	25,247	34,587
% Population Change 2010 to 2020	26.6%	22.8%	19.5%	14.3%
% Population Change 2010 to 2023	25.9%	22.6%	19.7%	13.6%
% Population Change 2020 to 2028	3.2%	2.5%	2.5%	1.2%
% Population Change 2023 to 2028	3.8%	2.7%	2.4%	1.8%
2023 Race and Ethnicity				
% 2023 White alone	17.4%	17.5%	18.3%	20.1%
% 2023 Black or African American alone	44.4%	45.0%	40.4%	35.8%
% 2022 Asian alone	16.3%	12.7%	12.9%	14.8%
% 2023 Other Race - Population	21.9%	24.7%	28.4%	29.4%
Hispanic or Latino				
% 2023 Hispanic	23.0%	26.5%	30.8%	31.8%
% 2023 Not Hispanic	77.0%	73.5%	69.2%	68.2%
2023 Age Trend				
Total population: Median age	35	35	35	35
Male population: Median age	34	33	33	33
Female population: Median age	37	36	36	36
Age 19 and Under	25.6%	28.5%	28.9%	29.0%
Age 20 to 29	14.7%	14.1%	14.1%	13.8%
Age 30 to 39	16.8%	15.9%	15.6%	14.5%
Age 40 to 49	13.0%	13.2%	13.3%	13.3%
Age 50 to 64	16.8%	16.5%	17.1%	17.9%
Age 65 and Over	13.1%	11.7%	11.1%	11.5%
2023 Male Population				
% Male population	45.4%	46.2%	47.1%	47.5%
% Male population: Under 5 years	8.9%	8.8%	8.2%	7.5%
% Male population: 5 to 9 years	6.8%	7.9%	7.9%	7.6%
% Male population: 10 to 14 years	7.2%	8.0%	8.0%	8.2%
% Male population: 15 to 19 years	5.8%	6.8%	7.1%	7.8%
% Male population: 20 to 24 years	6.3%	6.5%	6.7%	7.0%
% Male population: 25 to 29 years	7.7%	7.3%	7.5%	7.2%
% Male population: 30 to 34 years	8.9%	7.6%	7.2%	6.6%
% Male population: 35 to 39 years	8.0%	7.7%	7.6%	7.0%
% Male population: 40 to 44 years	7.1%	6.9%	7.2%	6.8%
% Male population: 45 to 49 years	6.2%	6.2%	6.3%	6.5%
% Male population: 50 to 54 years	5.2%	5.5%	5.7%	5.9%

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% Male population: 55 to 59 years	4.6%	4.6%	5.0%	5.5%
% Male population: 60 to 64 years	6.2%	5.5%	5.4%	5.6%
% Male population: 65 to 69 years	4.3%	3.9%	3.9%	4.2%
% Male population: 70 to 74 years	3.4%	3.4%	3.0%	3.1%
% Male population: 75 to 79 years	2.0%	1.7%	1.7%	1.9%
% Male population: 80 to 84 years	.8%	.8%	.8%	.9%
% Male population: 85 years and over	.7%	.8%	.7%	.7%

2023 Female Population

% Female population	54.6%	53.8%	52.9%	52.5%
% Female population: Under 5 years	6.9%	7.5%	7.4%	7.0%
% Female population: 5 to 9 years	6.0%	6.5%	6.5%	6.6%
% Female population: 10 to 14 years	5.4%	6.5%	6.7%	6.9%
% Female population: 15 to 19 years	4.9%	5.5%	6.3%	6.5%
% Female population: 20 to 24 years	6.2%	6.2%	6.4%	6.4%
% Female population: 25 to 29 years	9.1%	8.1%	7.5%	7.0%
% Female population: 30 to 34 years	9.0%	8.6%	8.2%	7.6%
% Female population: 35 to 39 years	7.8%	7.9%	8.0%	7.6%
% Female population: 40 to 44 years	6.8%	7.0%	6.9%	6.8%
% Female population: 45 to 49 years	5.9%	6.2%	6.2%	6.6%
% Female population: 50 to 54 years	5.8%	5.9%	6.2%	6.5%
% Female population: 55 to 59 years	6.1%	6.0%	6.1%	6.3%
% Female population: 60 to 64 years	5.6%	5.5%	5.7%	5.9%
% Female population: 65 to 69 years	4.9%	4.5%	4.4%	4.6%
% Female population: 70 to 74 years	4.2%	3.5%	3.3%	3.4%
% Female population: 75 to 79 years	2.8%	2.2%	2.0%	2.1%
% Female population: 80 to 84 years	1.4%	1.2%	1.1%	1.1%
% Female population: 85 years and over	1.4%	1.3%	1.1%	1.1%

HOUSEHOLD OVERVIEW

Household Trend

2010 HouseHolds	2,326	5,194	7,727	10,714
2020 HouseHolds	2,864	6,236	9,164	12,182
2023 Households	2,905	6,339	9,333	12,318
2028 Households	2,932	6,350	9,325	12,253
% Household Change 2010 to 2020	23.1%	20.1%	18.6%	13.7%
% Household Change 2010 to 2023	24.9%	22.0%	20.8%	15.0%
% Household Change 2020 to 2028	2.4%	1.8%	1.8%	.6%
% Household Change 2023 to 2028	.9%	.2%	-.1%	-.5%

2023 Household Size

Average household size	2.4	2.5	2.6	2.7
% Family households	60.0%	64.5%	67.1%	70.2%
% Nonfamily households	40.0%	35.5%	32.9%	29.9%

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Household Income Trend				
2010 Median income	\$42,518	\$43,583	\$45,661	\$48,141
2020 Median income	\$60,613	\$59,289	\$57,579	\$59,665
2023 Median income	\$65,534	\$65,409	\$64,426	\$65,724
2028 Median income	\$77,475	\$78,725	\$77,443	\$79,559
% Median Income Change 2010 to 2020	42.6%	36.0%	26.1%	23.9%
% Median Income Change 2010 to 2023	54.1%	50.1%	41.1%	36.5%
% Median Income Change 2020 to 2028	27.8%	32.8%	34.5%	33.3%
% Median Income Change 2023 to 2028	18.2%	20.4%	20.2%	21.1%
2010 Household income: Average	\$55,396	\$56,585	\$60,197	\$67,558
2020 Household income: Average	\$73,530	\$76,628	\$75,200	\$82,214
2023 Household income: Average	\$79,896	\$85,433	\$84,970	\$92,917
2028 Household income: Average	\$97,204	\$103,749	\$103,387	\$113,955
2023 Household Income				
up to \$24,999	23.8%	18.9%	19.8%	17.5%
\$25,000 to \$49,999	16.1%	19.1%	19.8%	19.4%
\$50,000 to \$74,999	18.8%	20.1%	18.7%	20.2%
\$75,000 to \$124,999	20.6%	21.5%	22.9%	22.4%
\$125,000 to \$199,999	17.2%	14.8%	12.4%	11.3%
\$200,000 or more	3.5%	5.6%	6.4%	9.1%
Income Below \$75,000	58.6%	58.1%	58.3%	57.1%
Income \$75,000 to \$199,999	37.8%	36.3%	35.3%	33.8%
HOUSING UNITS OVERVIEW				
2023 Home Value				
Median Home Value	\$159,356	\$161,767	\$165,519	\$174,119
Average Home Value	\$158,696	\$171,661	\$196,031	\$242,006
2023 Occupancy				
Households	2,905	6,339	9,333	12,318
Owner occupied	31.6%	33.2%	35.5%	42.1%
Renter occupied	67.8%	67.0%	64.5%	58.0%
Occupancy by Number of Units				
1, detached	15.5%	21.4%	20.6%	22.6%
1, attached	1.5%	1.8%	2.2%	2.9%
2	.0%	.0%	.5%	1.3%
3 or 4	19.7%	14.1%	12.5%	11.0%
5 to 9	10.7%	10.7%	13.0%	13.3%
10 to 19	23.2%	24.6%	24.0%	23.1%
20 to 49	13.1%	14.1%	11.3%	11.2%
50 or more	13.8%	11.5%	14.6%	13.6%
Mobile home	2.5%	1.9%	1.3%	1.1%
Boat, RV, van, etc.	.0%	.0%	.0%	.0%

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2023 Occupation				
Workers 16 years and over	3,771	8,228	12,527	16,796
White collar	55.9%	52.4%	50.9%	51.7%
Blue collar	44.1%	47.6%	49.1%	48.3%
2023 Educational Attainment				
Population 25 years and over	4,940	10,367	15,920	21,864
No High School Diploma	7.5%	12.5%	14.3%	15.5%
High school graduate, GED, or alternative	31.9%	29.0%	27.4%	25.6%
College No Degree	29.5%	23.2%	22.4%	21.0%
College Degree	21.0%	26.8%	26.9%	28.0%
Advanced Degree	10.1%	8.5%	9.0%	9.8%
College or Advanced Degree	31.1%	35.3%	35.8%	37.8%
2023 Marital Status				
Population 15 years and over	5,777	12,347	19,188	26,573
Not Married	55.8%	53.3%	51.6%	49.4%
Married	44.2%	46.7%	48.4%	50.6%
Average Travel Time to Work Trend				
2010 Average Travel Time to Work in Minutes	34	35	34	33
2020 Average Travel Time to Work in Minutes	39	37	35	35
2023 Average Travel Time to Work in Minutes	39	37	35	35
Work at Home Trend				
% 2010 Workers 16+ years who work at home	.8%	1.1%	1.6%	1.8%
% 2020 Workers 16+ years who work at home	3.9%	3.8%	3.9%	4.6%
% 2023 Workers 16+ years who work at home	4.1%	3.9%	3.9%	4.6%
Did Not Work at Home Trend				
% 2010 Workers 16+ years who did not work at	99.2%	98.9%	98.4%	98.2%
% 2020 Workers 16+ years who did not work at	96.1%	96.2%	96.1%	95.4%
% 2023 Workers 16+ years who did not work at	95.9%	96.1%	96.1%	95.5%
Mode of Transportation to Work				
Car, truck, or van - Drove alone	92.0%	82.5%	82.7%	82.0%
Car, truck, or van - Carpooled	4.4%	13.3%	14.1%	13.7%



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The contents of this study, including all projections, are based on information furnished by the client, customer and data collected by IMST in the field, and from other sources. IMST does not warrant that there have been no material changes in the data since generation, including merchantability and fitness for a particular purpose with regard to the study and all underlying data and analysis. IMST makes reasonable efforts to obtain all data for the study; however, market conditions are subject to change and these changes may significantly alter actual sales.

The completed study is not intended to provide a guarantee of actual business performance.

It is our understanding that the studied site has been thoroughly tested regarding potential contamination and no problems now exist that create negative environmental conditions.

If you should have any questions regarding this information, please call us at 281.398.0321.

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