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Economic & Planning Systems, Inc.
The Economics of Land Use

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Memorandum

To: Mark Loper; Reuben, Junius & Rose, LLP

From: Benjamin C. Sigman, Andrei Dumitrescu, & Megan Gregory; Economic & Planning Systems, Inc.

Subject: Market Study for Proposed Sebastopol Grocery Outlet
EPS #261014

Date: July 2, 2026

Introduction

Reuben, Junius & Rose, LLP retained Economic & Planning Systems, Inc. (EPS) on behalf of Grocery Outlet to evaluate grocery store retail market conditions in the Sebastopol, California trade area. The analysis assesses the extent to which local and visitor demand support additional grocery retail supply, with a particular focus on value-oriented grocery formats. The analysis quantifies consumer demand relative to existing grocery retail supply to estimate unmet market potential. The study considers income segments and associated shopping patterns, acknowledging a market niche for value-oriented grocery retailers. The analysis provides a comprehensive review of the food and beverage stores within and surrounding Sebastopol. The market study yields estimates of grocery retail supply relative to local demand and identifies opportunities for new grocery retail in Sebastopol.

Key Findings

The following key findings summarize the results of EPS's grocery retail market analysis for the Sebastopol trade area. These findings are based on an evaluation of trade area demographics, household and visitor grocery spending, existing grocery retail supply, and demand leakage (or surplus) by grocery store type.

The Sebastopol Grocery Outlet trade area (Figure 1) supports approximately $174.2 million in annual grocery retail demand, driven predominantly by higher-income households. Trade area households account for approximately $173.1 million of this total, with households earning $75,000 or more representing approximately 80 percent of aggregate household grocery demand. Visitor-generated grocery spending contributes an additional $1.1 million annually, reflecting Sebastopol's role as a tourism destination within Sonoma County.

Estimated market conditions support the introduction of a value-oriented discount grocery store in Sebastopol. While the trade area is well served by grocery retail overall, it remains underserved specifically in the discount grocery segment. The combination of measurable discount grocery leakage, a trade area underserved by value-oriented formats relative to its income composition, and the absence of a competing Grocery Outlet location within the defined trade area boundaries supports the introduction of the proposed store.

When demand and supply are evaluated by store format, the analysis identifies an imbalance within the grocery market. Specifically, demand for discount grocery exceeds current supply in the Grocery Outlet trade area, with estimated leakage of approximately $11.3 million in annual sales potential to outlying areas. The trade area is currently served by a single discount grocer, a FoodMaxx located in Santa Rosa, which likely does not fully satisfy demand from lower- and middle-income households for whom value-oriented grocery formats represent an important share of overall grocery spending. The analysis indicates that a discount grocer would fill an unmet need rather than replace shopping at Sebastopol's existing grocers. This leakage represents demand that exceeds the discount supply currently available, and the proposed store would primarily serve spending that leaves the trade area today rather than divert sales from established stores. The $11.3 million is an estimate of leakage that discount store formats could capture, and the share ultimately realized may vary with consumer shopping patterns.

The trade area is well served by its existing food and beverage stores, with total annual grocery sales estimated at approximately $201.8 million across roughly 360,000 square feet of retail space. This level of sales exceeds estimated trade area demand by approximately $27.6 million, indicating an overall supply surplus. This surplus reflects aggregate performance across all grocery store formats and masks variation within individual segments of the market, with conventional and premium supermarkets accounting for the majority of sales.

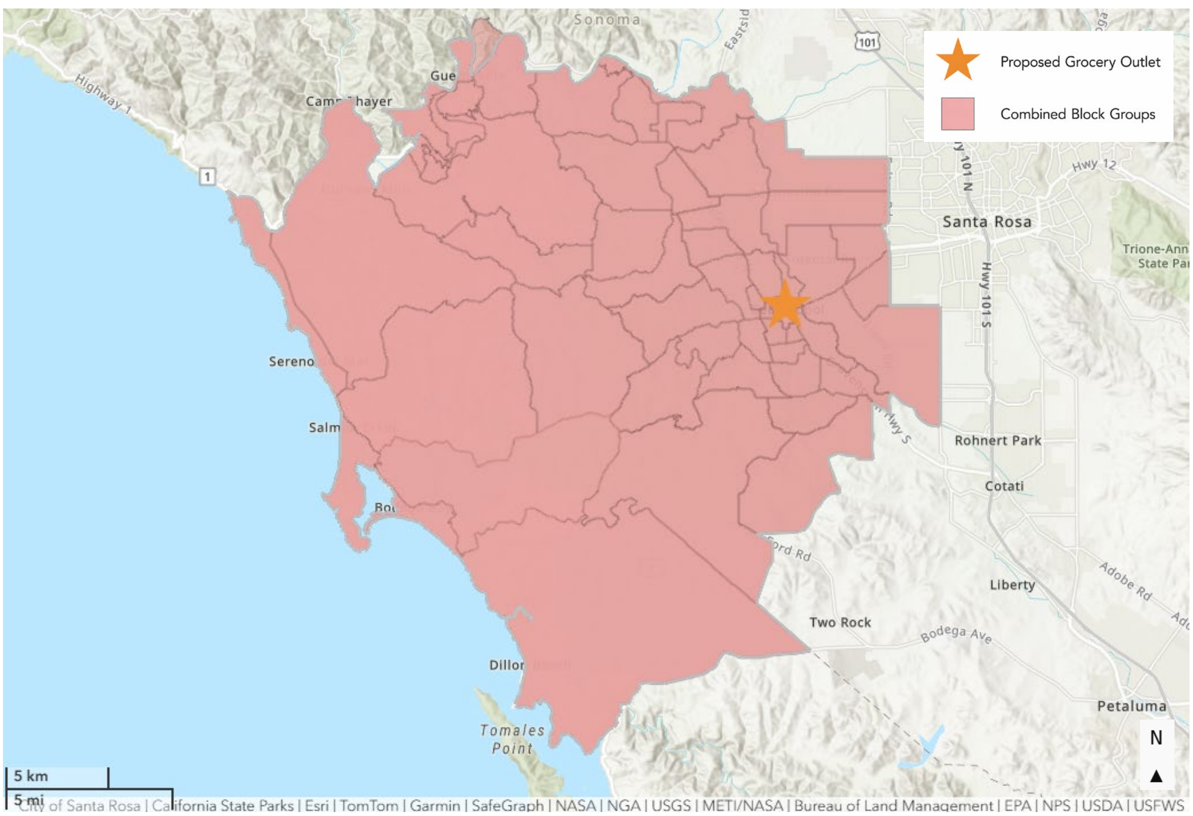
Methodology

Trade Area Definition and Methodology

The market study establishes grocery retail trade area specific to the proposed Grocery Outlet location at 218 North Main Street in Sebastopol. Defining the trade area incorporated identification of the proposed site location and analysis of the geography within 10-, 20-, and 30-minute drive-times, which factor in the site accessibility and likely customer draw patterns. EPS also evaluates the proposed location in relation to existing Grocery Outlet locations in Windsor, Santa Rosa, Rohnert Park, and Petaluma, all of which are located within approximately a 30-minute drive of the proposed site. To define likely customer capture from areas between stores, the analysis assumes consumers will favor the closer Grocery Outlet location. Approximate midpoint locations between the proposed and existing stores inform the eastern extent of the trade area, recognizing that areas located closer to existing Grocery Outlet stores would likely be served by those locations rather than the proposed Sebastopol store. The sequential steps used to define the trade area, including site drive-time radii, nearby Grocery Outlet locations and influence areas, store midpoint boundaries, and resulting census block group selections, are illustrated in **Appendix B**.

The Sebastopol Grocery Outlet Trade Area Geography (**Figure 1**) reflects Census block groups located within approximately a 30-minute drive time of the proposed site, excluding block groups that are closer to existing Grocery Outlet locations to the east. In general, selected block groups are located outside the approximate 3- to 5-mile influence areas of nearby Grocery Outlet stores, although some exceptions were made where census block group boundaries did not align with the desired trade area boundary. The resulting trade area includes 55 census block groups which are the basis for demographic, household, income, and consumer expenditure analyses. EPS also analyzes existing grocery retail stores within this trade area to evaluate the competitive landscape of grocery retailers serving Sebastopol and surrounding communities.

Figure 1 Sebastopol Grocery Outlet Trade Area Geography



Source: ESRI Business Analyst (May 28, 2026)

Grocery Retail Demand Methodology

EPS estimates grocery retail demand within the trade area using household demographic and consumer expenditure data. Household counts by income bracket are from ArcGIS Business Analyst for the finalized block-group trade area.[1] EPS then applies household expenditure assumptions derived from the 2024 U.S. Bureau of Labor Statistics Consumer Expenditure Survey to estimate grocery-related spending by household income category. Specifically, the analysis incorporates spending associated with the "Food at Home," "Alcoholic Beverages," and 50 percent of the "Household Supplies" expenditure categories to estimate total grocery-related household spending. These expenditure categories reflect the range of goods typically purchased at food and beverage stores, including conventional supermarkets, discount grocers, and specialty grocery stores.

The analysis aggregates average annual household spending assumptions for each income bracket across trade area households to estimate total grocery retail demand. EPS estimates that households within the selected trade area generate approximately $173.1 million in annual grocery-related spending demand, as shown in **Table 1**. This estimate represents the baseline household grocery retail demand used in subsequent analyses of grocery retail supply, capture rates, and unmet grocery retail potential within the trade area.

Table 1 Total Household Grocery Spending by Income Bracket

HH Income Base	Total Number of Households[1]	Combined HH Spend at Grocery Store[2]	Total Spend
<$15,000	1,040	$4,081	$4,244,240
$15,000 - $24,999	1,213	$4,382	$5,314,760
$25,000 - $29,999	474	$4,870	$2,308,475
$30,000 - $34,999	474	$4,870	$2,308,475
$35,000 - $49,999	1,204	$5,196	$6,255,984
$50,000 - $74,999	2,126	$6,474	$13,763,193
$75,000 - $99,999	2,612	$7,070	$18,466,840
$100,000 - $149,999	3,513	$8,356	$29,352,872
$150,000 - $199,999	2,780	$9,891	$27,495,590
$200,000+	5,154	$12,345	$63,623,553
Total	**20,590**		**$173,133,980**

[1] Based on selected trade area the proposed project will serve.
[2] Inclusive of "Food at Home", "Alcoholic Beverages", and fifty percent (50%) of "Household Supplies" spending categories from the 2024 BLS Consumer Expenditure Survey.

Source: Economic & Planning Systems, Inc., ESRI Business Analyst, BLS Consumer Expenditure Survey 2024

[1] "Household Income Profile" report derived from US Census Bureau sources.

EPS also evaluated visitor-generated grocery spending within Sebastopol to account for the City's role as a visitor-serving destination within Sonoma County. Visitor spending data from the Sonoma County Annual Tourism Report 2023 indicate visitors spent approximately $27.3 million in Sebastopol in 2022.[2] By applying the report finding that approximately 3.9 percent of total Sonoma County visitor spending occurs at food stores, the analysis estimates approximately $1.1 million in annual visitor grocery spending within Sebastopol.[3] The market study distributes this visitor spending across income brackets using visitor profile data from the same tourism report.[4]

Table 2 Total Visitor Grocery Spending by Income Bracket

	Total
Sebastopol Total Visitor Spend (2022)	$27,300,000
% Spend at Food Stores	3.90%
Sebastopol Share of County Food Store Visitor Spend	**$1,064,700**
Total Spend by Income Bracket	
<$30k	$201,632
$30k-$74k	$256,189
$75k+	$606,879
Total[1]	**$1,064,700**

[1] Total visitor spend at food stores by income bracket. HH income brackets for overnight trips from Sonoma County ATR collapsed to Drive Research income brackets.

Source: Drive Research, Economic and Planning Systems, Inc., Sonoma County Annual Tourism Report 2023

Consumer Segmentation

To refine the household expenditure analysis with consumers' shopping preferences, EPS incorporated consumer behavioral data from the Drive Research *State of Grocery Shopping* study, a national survey of 1,084 U.S. grocery shoppers.[5] This source provides the basis for estimating how household spending is distributed across food and beverage store formats by income bracket. Through consumer research and statistical analysis, the study identifies seven grocery shopper segments, ranging from cost-conscious "Frugal Do-it-Yourselfers" and budget-driven "Simple Pleasure Seekers" to higher-spending

[2] Sonoma County Tourism, *2022–2023 Annual Tourism Report* (Santa Rosa, CA: Sonoma County Tourism, 2023), accessed May 28, 2026, https://www.sonomacounty.com/wp-content/uploads/2023/12/ATR_FINAL_ADA.pdf

[3] Total visitor spending in Sebastopol of approximately $27.3 million was multiplied by the 3.9 percent food store share reported for Sonoma County overall. This countywide share was applied to Sebastopol in the absence of a jurisdiction-specific food store expenditure distribution.

[4] The Sonoma County tourism report presents visitor income data across five categories that do not align directly with the three consolidated income brackets used in this analysis. EPS proportionally allocated the lowest visitor income category, households earning less than $49,900, between the under-$30,000 and $30,000-to-$74,999 groupings based on the relative share of income range captured within each bracket. The remaining visitor income categories were then aggregated into the three consolidated groups accordingly.

[5] Drive Research, *The State of Grocery Shopping 2024* (Syracuse, NY: Drive Research, 2024), https://www.driveresearch.com/wp-content/uploads/2024/08/Drive-Research-State-of-Grocery-Shopping-4.pdf.

"Young Spenders" and "Health-Conscious Families." For each, the research identifies store format patronage patterns, trip spend, shopping frequency, and household income distribution. The income distribution reported for each segment serves as the linkage variable between the Drive Research behavioral data and the income-based household expenditure framework established by socioeconomic data for the trade area.

Store Format Spending Allocations

The Drive Research study presents the share of respondents who patronize each food and beverage store format. Because the survey permitted respondents to select multiple store formats, EPS normalized each segment's patronage rates and produced a set of relative probabilities (i.e., a distribution of grocery spending directed toward each store format). The frequency of shopping by store format informs a spending distribution in the absence of detailed spending data.

Appendix Table A-2 details the application of Drive Research to the Grocery Outlet trade area. **Appendix Table A-3** presents the store format spending allocations for each of the three income brackets.

Segmentation Caveats

Several methodological considerations should be noted when interpreting the store format spending allocations derived from the Drive Research data:

- Consumer preferences reflect self-reported shopping behavior, not measured transactions or expenditure records.
- Patronage by store format reflects where respondents report shopping, not how much they spend at each location.
- The national survey does not capture the specific shopping patterns or retail landscape of the Sebastopol trade area.

Notwithstanding these limitations, the Drive Research data provides a behaviorally grounded and internally consistent basis for distributing grocery spending across store formats and the resulting estimates are appropriate for the purposes of this analysis.

Grocery Demand in the Trade Area

EPS estimates total annual grocery retail demand within the trade area at approximately $174.2 million, inclusive of both household and visitor-generated spending (See **Appendix Tables A-1** and **A-4**). When distributed across store formats, demand for conventional and premium supermarkets totals approximately $99.0 million annually, the greatest share of demand. Discount grocers represent the second most significant category of grocery stores in the trade area, with annual demand estimated at approximately $40.0 million. Produce markets, specialty stores, and independent grocers account for approximately $14.0 million in demand, online retailers for approximately

$17.0 million, and convenience stores for the remaining $3.2 million, as summarized in **Appendix Table A-3**.

Grocery Supply in the Trade Area

EPS identified and evaluated existing grocery retail stores operating within the trade area to understand competitive supply conditions surrounding the proposed Grocery Outlet location. The inventory of existing food and beverage retailers includes stores located within Sebastopol and nearby communities within the trade area. Existing stores were categorized by store format, including conventional and premium supermarkets, discount grocers, produce markets/specialty food markets, and convenience stores. Store format classifications were informed by the CDFI Fund “Understanding the Grocery Industry” report, which provides standardized descriptions of grocery retail typologies and operating characteristics.[6]

The market study identifies approximately 360,000 square feet of grocery retail space within the trade area, as shown in **Appendix Table A-5**. The competitive landscape is anchored by larger conventional supermarkets, including Safeway and Lucky in Sebastopol and Safeway in Guerneville, as well as regional-serving discount grocery retailers such as FoodMaxx and specialty stores including Whole Foods Market and Oliver's Market. The trade area also contains a substantial number of smaller produce markets, specialty food retailers, and convenience-oriented stores distributed throughout Sebastopol, western Sonoma County, and coastal communities. These smaller-format stores generally offer localized convenience and specialty shopping needs rather than functioning as full-service regional grocery destinations. Building square footage estimates reflect data from CoStar and LoopNet where available, with aerial imagery and Google Earth measurements utilized where building data were not publicly accessible.

Grocery Store Sales Productivity

To estimate existing grocery retail supply capacity within the trade area, EPS applies sales productivity assumptions derived from industry sources, expressed as annual sales per square foot. **Table 3** summarizes productivity research findings and market study assumptions.

[6] Federal Reserve Bank of Chicago, *Understanding the Grocery Industry* (Chicago, IL: Federal Reserve Bank of Chicago and the CDFI Fund, October 24, 2011), https://www.cdfifund.gov/system/files/documents/understanding-grocery-industry_for-fund_102411.pdf

Table 3 Grocery Store Sales per Square Foot

Store Format	Sales per SF Range	Estimated Trade Area Sales per SF
Conventional & Premium Supermarket[1]	\$700 - \$2,500	\$750
Discount Grocer[2]	\$500 - \$700	\$500
Produce Market/Specialty Food Market[3]	\$400	\$400
Convenience Store[4]	\$330	\$330

[1] Estimated sales per square foot for the Conventional & Premium Supermarket category is set at \$750/SF, informed by national supermarket benchmarks and industry analyses of chain-level grocery sales performance.

[2] Sales per square foot for the Discount category are adjusted downward to reflect that only one discount grocer exists within the trade area and its store size more closely aligns with warehouse discount formats. While industry benchmarks range from \$500–700/SF, estimated performance for comparable FoodMaxx stores suggests \$400–460/SF; therefore, \$500/SF was selected as a conservative trade area assumption.

[3] Includes neighborhood markets, small grocery, and independent stores.

[4] Includes deli, corner market, and liquor market stores.

Sources: Economic & Planning Systems, Inc.; Food Marketing Institute, Food Industry Facts; Penn State Extension, Retail Farm Market Benchmark Project; JLL data as reported by Business Insider and Equity CRE; Retail Execs – LinkedIn; SoLink; Toast, Progressive Grocer, The Save Mart Companies.

Retail Leakage Analysis

Retail leakage analysis compares local consumer demand with local retail supply, to quantify spending by local residents outside their community (i.e., "leakage"). EPS estimates existing grocery supply in the trade area supports roughly \$201.8 million in annual sales, compared to estimated total demand of approximately \$174.2 million. These estimates yield an overall supply surplus of approximately \$27.6 million, as shown in **Table 4** (i.e., Sebastopol is drawing additional shoppers from outside the trade area). This finding indicates that the Sebastopol trade area is broadly well-served by its existing grocery retail inventory, with food and beverage store sales that exceed local household and visitor grocery demand across the trade area as a whole.

Discount grocers, however, appear undersupplied. The analysis identifies leakage of approximately \$11.3 million in the discount grocer category. The existing discount grocery supply is attributable to a single operator within the trade area (Foodmaxx in Santa Rosa). Given the trade area's lower- and middle-income household base, discount grocery formats represent a disproportionately important share of grocery spending.[7]

[7] The analysis also reflects a leakage condition of approximately \$17.1 million for online retail formats. As no physical square footage is assigned to online retailers in the trade area supply inventory, this leakage is structural rather than indicative of unmet demand for brick-and-mortar grocery space and is excluded from the surplus/leakage discussion accordingly.

Table 4 Retail Surplus/Leakage of Discount Grocers

Store Format	Total Square Feet in Trade Area[1]	Annual Sales ($)/SF[2]	Total Sales (Supply) ($MM)	Total Potential HH Spend (Demand)[3] ($MM)	Surplus/(Leakage) ($MM)
Formula	*a*	*b*	*c = a*b*	*d*	*e = c - d*
Conventional & Premium Supermarket	161,330	$750	$121.0	$99.6	$21.4
Discount Grocer	57,897	$500	$28.9	$40.3	($11.3)
Convenience Store	44,415	$300	$13.3	$3.18	$10.1
Produce Market/Specialty Food Market	96,431	$400	$38.6	$14.1	$24.5
Online Retailer[4]				$17.1	($17.1)
Totals	**360,073**	**$561**	**$201.8**	**$174.2**	**$27.6**

*Numbers may not sum due to rounding.

[1] See **Appendix Table A-5** for total square footage of existing grocers in selected trade area.

[2] See **Table 3**.

[3] Combined household and visitor spend from **Table 1** and **Table 2.**

[4] No square footage from existing grocers allocated to online retailers.

Source: Economic and Planning Systems, Inc.

The majority of the food and beverage sales surplus ($21.4 million) is attributable to conventional and premium supermarkets. The trade area's concentration of full-service supermarkets, including Safeway and Lucky, draw consumers into the trade area. Similarly, convenience stores and produce markets also achieve surplus sales approximately $10.1 million and $24.5 million respectively, suggesting adequate supply of smaller-format and specialty grocery options relative to estimated demand in those categories.

Discount Grocery Sales Estimate Evaluation

The leakage estimate for the discount grocery category depends on the sales volume FoodMaxx generates. EPS estimates FoodMaxx at approximately $500 per square foot in annual sales, at the low end of the $500 to $700 per square foot range that discount grocers typically achieve. The analysis applies this sales figure because this FoodMaxx is significantly larger than a typical discount store and is unlikely to match the per-square-foot sales levels seen at smaller, more focused discount formats.

To evaluate the importance of the FoodMaxx sales assumption, EPS conducted a sensitivity analysis using a higher FoodMaxx sales figure of $650 per square foot, near the middle of the benchmark range. Under that scenario, estimated discount supply rises to approximately $37.6 million and the leakage narrows from approximately $11.3 million to approximately $2.6 million. The gap is not fully eliminated unless FoodMaxx is assumed to perform at roughly $695 per square foot, at the upper end of the benchmark range, which is inconsistent with the store's larger-than-typical size and its status as the sole discount grocer in the area.

Importantly for Sebastopol, the FoodMaxx is located in Santa Rosa. Accordingly, if the proposed Grocery Outlet were to divert a portion of sales from FoodMaxx, that competitive impact would impact retail sales and tax revenue in Santa Rosa. From Sebastopol's perspective, the proposed Grocery Outlet store would introduce the first discount grocery in the city, and the potential for direct competition is likely to be with a store in another jurisdiction.

Leakage Analysis Caveats

Unmet demand refers to grocery spending generated by trade area households that exceeds the supply available within a given store format. Existing households already direct their grocery spending across a range of supermarkets, specialty stores, and discount grocers in and around Sebastopol. EPS's analysis indicates that demand for discount grocery formats exceeds the sales volume of discount grocery supply presently operating in the trade area (i.e., an unmet-demand gap of approximately $11.3 million in estimated annual leakage). Because this measured demand is unmet by local stores, a new discount grocer could attract spending that currently leaks out of the trade area, rather than displacing sales at established grocers. At the same time, consumer shopping preferences and patterns may shift and these potential changes are not predicted by the EPS study. Some degree of substitution from existing stores in the local trade area is possible. Furthermore, a portion of the leakage quantified is likely from trade area residents shopping at Grocery Outlet locations elsewhere along the Highway 101 corridor.[8]

This market study analysis does not account for commute patterns or secondary trade area dynamics. A portion of the observed surplus in certain categories may reflect capture of demand generated by shoppers traveling through or into the trade area from surrounding communities, rather than solely resident- and visitor-generated demand. Relatedly, trade area residents may also satisfy some of their grocery needs at stores located outside the defined trade area boundaries. These dynamics are inherent to any trade area analysis and do not materially alter key findings.

[8] This analysis does not specifically quantify or attribute any reduction in sales at Grocery Outlet's other locations resulting from the proposed Sebastopol store.

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Table A-1
Sebastopol Market Study
ESRI Business Analyst Household Spending Collapsed to Drive Research Income Brackets

Income Bracket	# of Households	Total Spend	% of Total
<$30k	2,727	$11,867,474	7%
$30k-$74k	3,804	$22,327,651	13%
$75k+	14,059	$138,938,855	80%
Total	**20,590**	**$173,133,980**	**100%**

Source: Economic & Planning Systems, Inc., ESRI Business Analyst, Drive Research, BLS Consumer Expenditure Survey 2024

Table A-2
Sebastopol Market Study
Household Spend Allocation to Store Format

Store Format	<$30k	$30k-$74k	$75k+	Example Retailers
Conventional & Premium Supermarket	57%	55%	57%	Safeway, Albertsons, Kroger, Whole Foods, Sprouts
Discount Grocer	26%	25%	23%	Grocery Outlet, Walmart Supercenter, Dollar General
Convenience Store	2%	2%	2%	7-Eleven, Liquor Stores
Produce Market / Specialty / Independent	10%	9%	8%	Farmers Markets, Neighborhood Grocers
Online Retailer	6%	9%	10%	Amazon Fresh, Instacart
TOTAL	**100%**	**100%**	**100%**	

Sources: Economic & Planning Systems, Inc., Drive Research

Table A-3
Sebastopol Market Study
Household Total Grocery Spend by Store Format in Subject Trade Area

Store Format[1]	<$30k	$30k-$74k	$75k+	Total
Conventional & Premium Supermarket	$6,731,548	$12,367,347	$79,860,360	**$98,959,255**
Discount Grocer	$3,033,155	$5,519,797	$31,453,061	**$40,006,012**
Convenience Store	$216,696	$397,261	$2,555,158	**$3,169,116**
Produce Market / Specialty / Independent	$1,130,621	$2,039,512	$10,844,962	**$14,015,095**
Online Retailer	$755,455	$2,003,733	$14,225,315	**$16,984,502**
Total	**$11,867,474**	**$22,327,651**	**$138,938,855**	**$173,133,980**

[1] Total HH spend from **Table 2** multiplied by spend allocation by store format from **Table 3.**

Source: Drive Research, Economic and Planning Systems, Inc., ESRI Business Analyst

Table A-4
Sebastopol Market Study
Visitor Total Food Spend by Store Format in Sebastopol

Store Format[1]	<$30k	$30k-$74k	$75k+	Total
Conventional Supermarket	$104,701	$129,688	$313,500	**$547,889**
Natural / Specialty Supermarket	$9,670	$12,216	$35,327	**$57,213**
Discount Grocer	$51,534	$63,335	$137,386	**$252,254**
Convenience Store	$3,682	$4,558	$11,161	**$19,401**
Produce Market / Specialty / Independent	$19,210	$23,402	$47,370	**$89,981**
Online Retailer	$12,835	$22,991	$62,136	**$97,962**
TOTAL	**$201,632**	**$256,189**	**$606,879**	**$1,064,700**

[1] Total vistor spend at Sebastopol Food food stores multiplied by spend allocation by store format from **Table 3.**

Source: Drive Research, Economic and Planning Systems, Inc., Sonoma County Annual Tourism Report 2023

Table A-5
Sebastopol Market Study
Existing Grocers in Selected Trade Area

Store Name	Address	City	Building Square Footage	Store Format
Subject Property				
Grocery Outlet	218 N. Main St.	Sebastopol	15,550	Discount Grocer
Sebastopol Grocers				
Safeway	406 N Main St	Sebastopol	47,724	Conventional & Premium Supermarket
Whole Foods Market	6910 McKinley St	Sebastopol	13,140	Conventional & Premium Supermarket
Sebastopol Community Market	6762 Sebastopol Ave #100	Sebastopol	12,489	Conventional & Premium Supermarket
Pacific Market	2804 550 Gravenstein Hwy N	Sebastopol	23,000	Produce Market/Specialty Food Market
Lucky	776 Gravenstein Hwy N	Sebastopol	31,170	Conventional & Premium Supermarket
7-Eleven	167 Pleasant Hill Ave N	Sebastopol	3,000	Conventional & Premium Supermarket
Andy's Produce Market	1691 Gravenstein Hwy N	Sebastopol	17,951	Produce Market/Specialty Food Market
Bill's Market and Deli #2	3195 Gravenstein Hwy N	Sebastopol	3,000	Convenience Store
Fircrest Market	998 Gravenstein Hwy S	Sebastopol	13,581	Produce Market/Specialty Food Market
R & B Market & Liquor	1130 Gravenstein Hwy S #116	Sebastopol	8,331	Convenience Store
Sequoia Mini Mart	1382 Gravenstein Hwy S #B	Sebastopol	2,097	Convenience Store
North of Sebastopol				
El Rey Market & Taqueria	6466 Mirabel Rd	Forestville	4,400	Produce Market/Specialty Food Market
La Rosa Market & Taqueria	6555 Front St	Forestville	4,509	Produce Market/Specialty Food Market
Bill's Liquor	6679 Front St	Forestville	1,860	Convenience Store
Speer's Market & Deli	7891 Mirabel Rd	Forestville	13,633	Produce Market/Specialty Food Market
Sam's Market #14	10651 River Rd	Forestville	3,096	Convenience Store
Safeway	16405 CA-116	Guerneville	31,355	Conventional & Premium Supermarket
Duncans Mills General Store	25200 CA-116	Duncans Mills	3,500	Convenience Store
East of Sebastopol				
Stop N Save	1078 S Wright Rd	Santa Rosa	3,600	Convenience Store
Foodmaxx	2055 Sebastopol Rd	Santa Rosa	57,897	Discount Grocer
La Famiglia Market and Deli	3931 Sebastopol Rd	Santa Rosa	1,800	Convenience Store
Quick Pick Market & Deli	925 Corporate Center Pkwy J	Santa Rosa	2,500	Convenience Store
MD Liquor & Food	2446 W 3rd St	Santa Rosa	3,000	Convenience Store
MD Liquor & Food	1930 Sebastopol Rd	Santa Rosa	2,852	Convenience Store
CS Liquor Mart	419 Stony Point Rd	Santa Rosa	4,079	Convenience Store
Oliver's Market - Stony Point	461 Stony Point Rd	Santa Rosa	22,452	Conventional & Premium Supermarket
West of Sebastopol				
Bill's Farm Basket	10315 Bodega Hwy	Sebastopol	4,000	Produce Market/Specialty Food Market
Bohemian Market	3691 Main St	Occidental	4,857	Produce Market/Specialty Food Market
Bodega County Store	17190 Bodega Hwy	Bodega	2,100	Produce Market/Specialty Food Market
Valley Ford Market	14400 Coast, 14400 CA-1	Valley Ford	3,000	Produce Market/Specialty Food Market
Pelican Plaza Grocery & Deli	1400 CA-1	Bodega Bay	2,000	Produce Market/Specialty Food Market
Diekmann's Bay Store	1275 CA-1	Bodega Bay	3,400	Produce Market/Specialty Food Market
Tomales General Store	27005 CA-1	Tomales	2,300	Convenience Store
Dillon Beach General Store	1 Beach Ave	Dillon Beach	2,400	Convenience Store
Total Sqft			**360,073**	

Source: Economic & Planning Systems, Inc., Google Maps, Google Earth, CoStar, Loopnet, CDFI Fund

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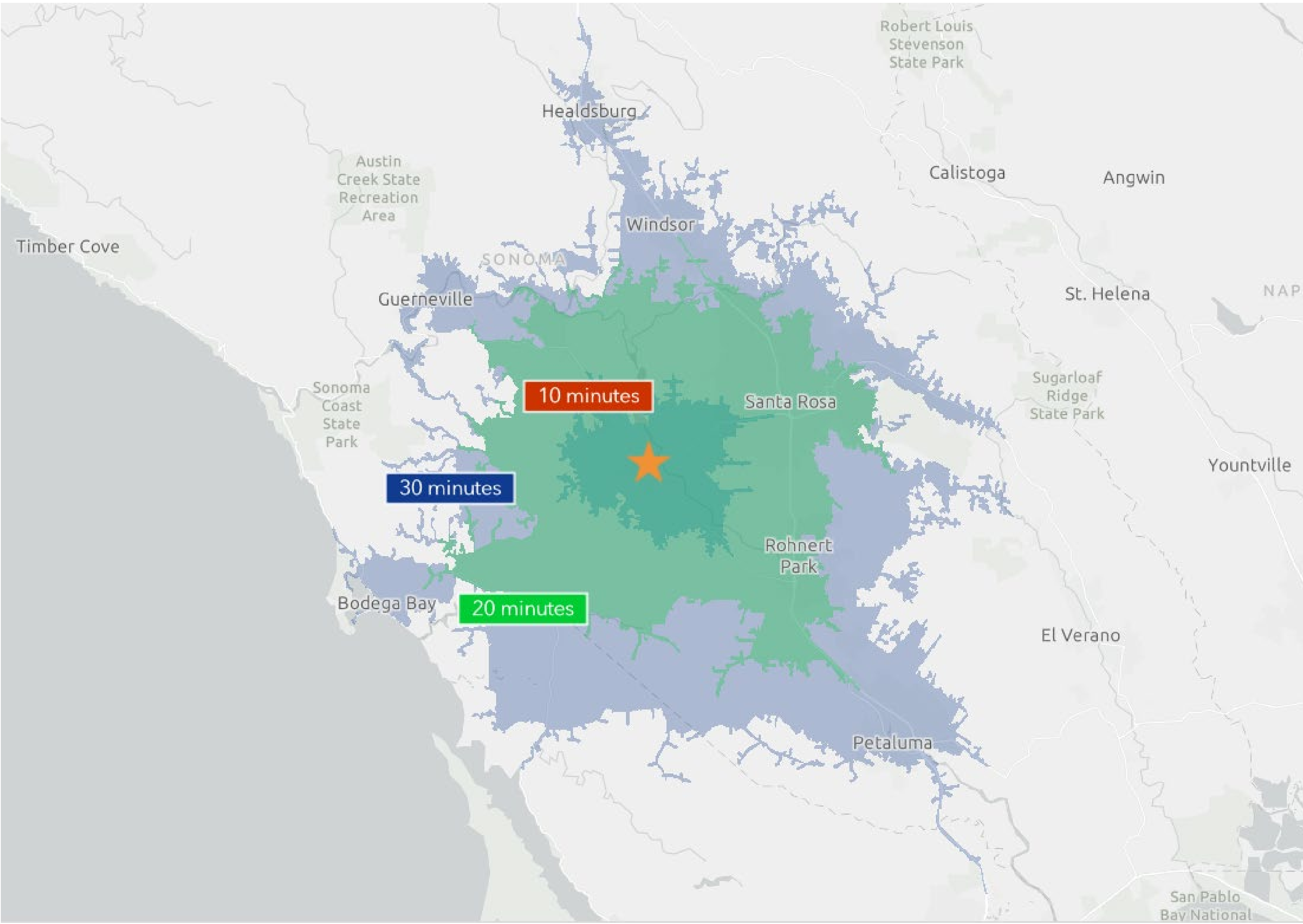
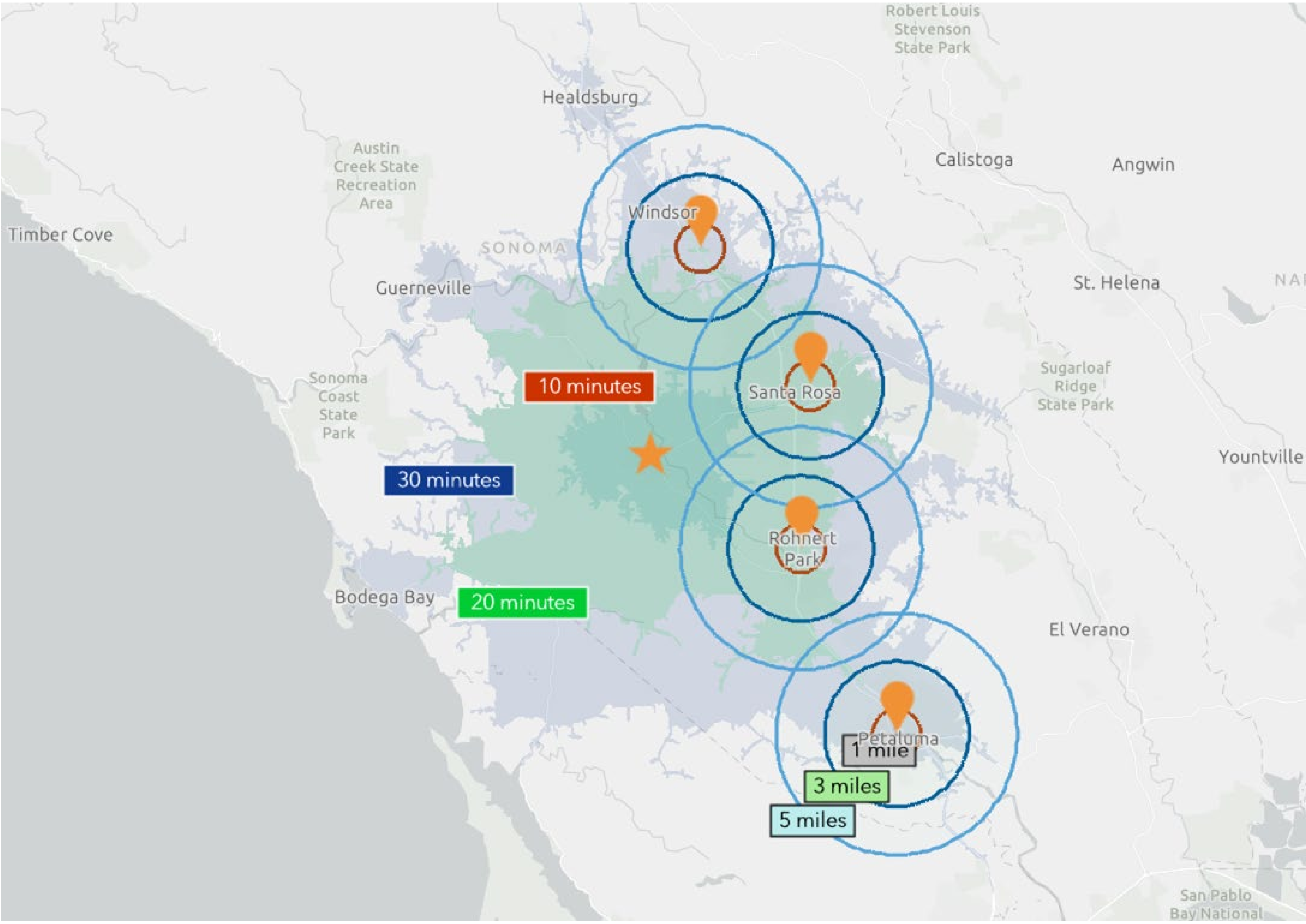
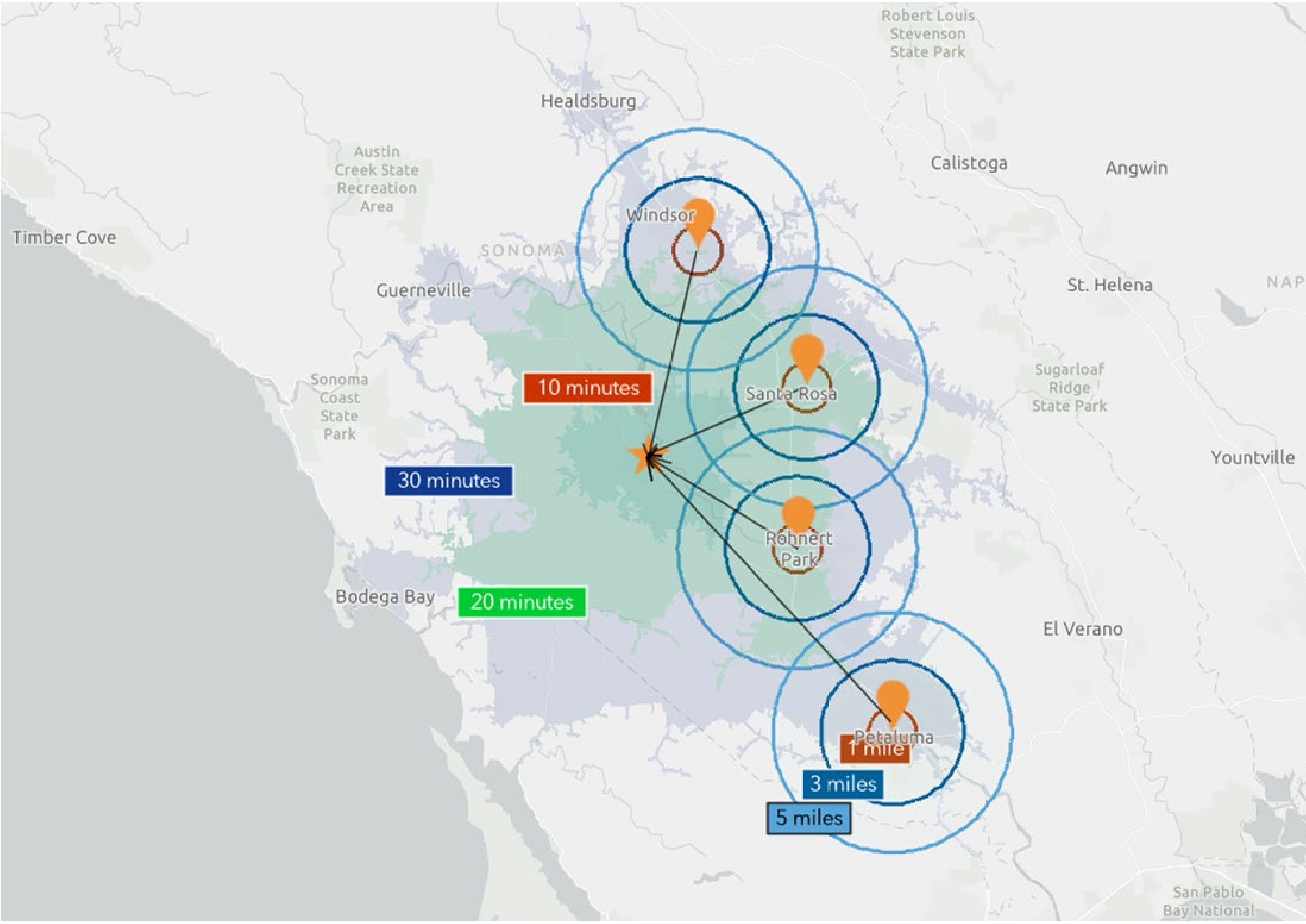
Map 1. Site Location and Drive Times



Map 2. Nearby Grocery Outlets



Map 3. Defining Trade Area Boundary Using Store Midpoints



Map 4. Selected Trade area for Proposed Site by Census block