



# WASHINGTON, DC RETAIL MARKET REPORT

## SPRING 2025

### DC Retail Submarkets Snapshot

Market High Street	Units	Inventory (SF)	Vacant (SF)	WINTER 2024	SPRING 2025	Shadow <sup>1</sup> Available (SF)	Shadow Rate (%)	Vacancy +Shadow (%)
				Vacancy Rate (%)	Vacancy Rate (%)			
<b>Georgetown</b>	<b>437</b>	<b>1,717,815 SF</b>	<b>122,510 SF</b>	<b>9.21%</b>	▼ <b>7.13%</b>	<b>81,669 SF</b>	<b>4.75%</b>	<b>11.89%</b>
M Street	181	889,168 SF	60,928 SF	6.85%		40,540 SF	4.56%	11.41%
Wisconsin Avenue	256	828,647 SF	61,582 SF	11.73%	▼ <b>7.43%</b>	41,129 SF	4.96%	12.40%
<b>Connecticut Avenue Corridor</b>	<b>295</b>	<b>978,876 SF</b>	<b>200,797 SF</b>	<b>21.00%</b>	<b>20.51%</b>	<b>61,212 SF</b>	<b>6.25%</b>	<b>26.77%</b>
Central Business District	194	716,691 SF	148,799 SF	21.42%	▼ <b>20.76%</b>	52,609 SF	7.34%	28.10%
Dupont Circle North	101	262,185 SF	51,998 SF	19.83%		8,603 SF	3.28%	23.11%
<b>East End</b>	<b>539</b>	<b>2,786,955 SF</b>	<b>555,829 SF</b>	<b>20.34%</b>	<b>19.94%</b>	<b>87,756 SF</b>	<b>3.15%</b>	<b>23.09%</b>
F Street	104	654,673 SF	217,260 SF	37.00%	▼ <b>33.19%</b>	24,336 SF	3.72%	36.90%
7 <sup>th</sup> Street NW	134	746,237 SF	130,308 SF	16.60%	▲ <b>17.46%</b>	22,958 SF	3.08%	20.54%
H Street & City Center	101	371,689 SF	52,381 SF	12.08%	▲ <b>14.09%</b>	13,218 SF	3.56%	17.65%
11 <sup>th</sup> Street	27	387,346 SF	22,699 SF	8.90%	▼ <b>5.86%</b>	15,929 SF	4.11%	9.97%
McPherson	173	627,010 SF	133,181 SF	19.48%	▲ <b>21.24%</b>	11,315 SF	1.80%	23.05%
<b>Capitol Hill</b>	<b>170</b>	<b>365,210 SF</b>	<b>42,290 SF</b>	<b>10.81%</b>	<b>11.58%</b>	<b>2,722 SF</b>	<b>0.75%</b>	<b>12.32%</b>
Pennsylvania Avenue SE	77	158,583 SF	19,039 SF	9.38%	▲ <b>12.01%</b>	2,722 SF	1.72%	13.72%
Barracks Row	93	206,627 SF	23,251 SF	11.90%	▼ <b>11.25%</b>	0 SF	0.00%	11.25%
<b>14<sup>th</sup> Street Corridor</b>	<b>238</b>	<b>832,239 SF</b>	<b>74,569 SF</b>	<b>8.40%</b>	<b>8.96%</b>	<b>33,625 SF</b>	<b>4.04%</b>	<b>13.00%</b>
<b>Shaw</b>	<b>265</b>	<b>758,590 SF</b>	<b>92,942 SF</b>	<b>11.98%</b>	<b>12.25%</b>	<b>5,407 SF</b>	<b>0.71%</b>	<b>12.96%</b>
<b>Chevy Chase</b>	<b>125</b>	<b>1,263,079 SF</b>	<b>390,516 SF</b>	<b>30.92%</b>	<b>30.92%</b>	<b>23,432 SF</b>	<b>1.86%</b>	<b>32.77%</b>
<b>Capitol Riverfront</b>	<b>188</b>	<b>706,617 SF</b>	<b>105,805 SF</b>	<b>14.13%</b>	<b>14.97%</b>	<b>11,128 SF</b>	<b>1.57%</b>	<b>16.55%</b>
<b>Clarendon</b>	<b>196</b>	<b>963,205 SF</b>	<b>73,671 SF</b>	<b>7.57%</b>	<b>7.65%</b>	<b>52,913 SF</b>	<b>5.49%</b>	<b>13.14%</b>
<b>Old Town Alexandria</b>	<b>249</b>	<b>718,844 SF</b>	<b>41,949 SF</b>	<b>5.83%</b>	<b>5.84%</b>	<b>80,089 SF</b>	<b>11.14%</b>	<b>16.98%</b>
<b>Tysons</b>	<b>273</b>	<b>2,291,069 SF</b>	<b>200,074 SF</b>	<b>7.65%</b>	<b>8.73%</b>	<b>27,715 SF</b>	<b>1.21%</b>	<b>9.94%</b>
<b>Bethesda Row</b>	<b>130</b>	<b>467,060 SF</b>	<b>5,428 SF</b>	<b>2.61%</b>	<b>1.16%</b>	<b>3,198 SF</b>	<b>0.68%</b>	<b>1.85%</b>
<b>Rockville Pike</b>	<b>642</b>	<b>3,772,198 SF</b>	<b>286,625 SF</b>	<b>6.91%</b>	<b>7.60%</b>	<b>80,974 SF</b>	<b>2.15%</b>	<b>9.74%</b>
<b>Downtown Silver Spring</b>	<b>257</b>	<b>1,280,479 SF</b>	<b>122,831 SF</b>	<b>8.64%</b>	<b>9.59%</b>	<b>18,724 SF</b>	<b>1.46%</b>	<b>11.05%</b>
<b>Columbia Heights</b>	<b>139</b>	<b>724,029 SF</b>	<b>90,174 SF</b>	<b>7.11%</b>	<b>12.45%</b>	<b>10,950 SF</b>	<b>1.51%</b>	<b>13.97%</b>
<b>Union Market / NoMa</b>	<b>207</b>	<b>975,339 SF</b>	<b>171,634 SF</b>	<b>19.12%</b>	<b>17.60%</b>	<b>2,127 SF</b>	<b>0.22%</b>	<b>17.82%</b>
<b>Totals</b>	<b>4,350</b>	<b>20,601,604 SF</b>	<b>2,577,644 SF</b>	<b>12.30%</b>	<b>12.51%</b>	<b>583,641 SF</b>	<b>2.83%</b>	<b>15.34%</b>

<sup>1</sup> Shadow: Occupied space available for lease, availability may not be widely advertised.



# Openings & Closings Along DC High Streets

	RECENTLY OPENED			OPENING SOON			RECENTLY CLOSED		
	RESTAURANT	RETAIL	TOTAL	RESTAURANT	RETAIL	TOTAL	RESTAURANT	RETAIL	TOTAL
14 <sup>TH</sup> STREET CORRIDOR	4	3	7	5	3	8	4	3	7
BETHESDA ROW	-	2	2	-	8	8	2	1	3
CAPITOL HILL	1	2	3	5	-	5	3	-	3
CAPITOL RIVERFRONT	1	2	3	3	3	6	3	-	3
CENTRAL BUSINESS DISTRICT	-	-	-	8	2	10	1	-	1
CHEVY CHASE	-	-	-	-	5	5	-	-	-
CLARENDON	-	-	-	13	5	18	-	-	-
COLUMBIA HEIGHTS	3	-	3	1	1	2	1	2	3
DOWNTOWN SILVER SPRING	-	1	1	4	2	6	1	2	3
DUPONT CIRCLE NORTH	2	-	2	1	-	1	-	-	-
EAST END	4	2	6	15	7	22	3	3	6
GEORGETOWN	3	4	7	11	13	24	1	3	4
OLD TOWN ALEXANDRIA	1	-	1	5	5	10	1	1	2
ROCKVILLE PIKE	3	3	6	18	10	28	4	7	11
SHAW	1	2	3	8	-	8	-	1	1
TYSONS	2	1	3	5	1	6	-	1	1
UNION MARKET / NOMA	2	3	5	18	4	22	1	-	1
TOTAL	27	25	52	120	69	189	25	24	49



# Openings & Closings Along DC High Streets

## RECENTLY OPENED

Name	Type	Address	Submarket
<a href="#">Alara</a>	Restaurant	1303-1305 Wisconsin Avenue NW	Georgetown
<a href="#">Arc'teryx</a>	Retail	3214-3218 M Street NW	Georgetown
<a href="#">Bar Betsie</a>	Restaurant	1320 4th Street NE	Union Market / NoMa
<a href="#">Barry's Bootcamp</a>	Retail	300 Tingey Street SE	Capitol Riverfront
<a href="#">Be Mighty Fitness</a>	Retail	8525 Georgia Avenue	Downtown Silver Spring
<a href="#">BOSS</a>	Retail	555 11th Street NW	East End
<a href="#">Boulboulina</a>	Restaurant	915 Meeting Street	Rockville Pike
<a href="#">Caspian Crust</a>	Restaurant	1826 Wisconsin Avenue NW	Georgetown
<a href="#">Citibank</a>	Retail	1258 Wisconsin Avenue NW	Georgetown
<a href="#">Come Say High</a>	Retail	1015 1/2 7th St NW	East End
<a href="#">Corinto Gallery</a>	Retail	1707 7th Street NW	Shaw
<a href="#">District Eagle</a>	Restaurant	1357 U Street NW	14th Street Corridor
<a href="#">Don Fuego</a>	Retail	1126 9th Street NW	Shaw
<a href="#">Dragon Hero</a>	Restaurant	2016 9th Street NW	Shaw
<a href="#">Dupont Coffee Collective</a>	Restaurant	1901-1909 Q Street NW	Dupont Circle North
<a href="#">El Rey</a>	Restaurant	79 Potomac Avenue SE	Capitol Riverfront
<a href="#">Empire Racquet</a>	Retail	419 8th Street SE	Capitol Hill
<a href="#">Evereve</a>	Retail	7236-7278 Woodmont Avenue	Bethesda Row
<a href="#">First Watch</a>	Restaurant	7501 Leesburg Pike	Tysons
<a href="#">Flight Club</a>	Restaurant	655 New York Avenue NW	East End
<a href="#">FP Movement</a>	Retail	7228 Woodmont Avenue	Bethesda Row
<a href="#">Fraiche</a>	Restaurant	3345 14th Street NW	Columbia Heights
<a href="#">Fresh Baguette</a>	Restaurant	1440 New York Avenue NW	East End
<a href="#">Fuddruggers</a>	Restaurant	701-785 7th Street NW	East End
<a href="#">Gearin' Up Bicycles</a>	Retail	151 Q Street NE	Union Market / NoMa
<a href="#">Glowbar</a>	Retail	1450 P Street NW	14th Street Corridor
<a href="#">Going, Going, Gone!</a>	Retail	1675 Rockville Pike	Rockville Pike
<a href="#">Gold's Gym</a>	Retail	1005 1st Street NE	Union Market / NoMa
<a href="#">Hand &amp; Stone Massage and Facial Spa</a>	Retail	815-895 Rockville Pike	Rockville Pike
<a href="#">Kajiken</a>	Restaurant	7501 Leesburg Pike	Tysons
<a href="#">Kiehl's</a>	Retail	3110 M Street NW	Georgetown
<a href="#">Lip Lab</a>	Retail	1614 14th Street NW	14th Street Corridor
<a href="#">Livewell Animal Hospital</a>	Retail	1240 3rd Street NE	Union Market / NoMa
<a href="#">LUMA Wellness Studio</a>	Retail	1300 Yards Place SE	Capitol Riverfront
<a href="#">Manufuji Japanese Market</a>	Retail	8520 Leesburg Pike	Tysons
<a href="#">Muni</a>	Restaurant	1400 14th Street NW	14th Street Corridor
<a href="#">Nothing Bundt Cakes</a>	Restaurant	1020-1054 Rockville Pike	Rockville Pike
<a href="#">Oki Bowl Ramen</a>	Restaurant	1614 Wisconsin Avenue NW	Georgetown
<a href="#">Sabeh Cafe and Pastry</a>	Restaurant	1400 Irving Street NW	Columbia Heights
<a href="#">Sagrada</a>	Restaurant	1901 14th Street NW	14th Street Corridor
<a href="#">Saigon Rolls</a>	Restaurant	606 King Street	Old Town Alexandria
<a href="#">Salvi Mex</a>	Restaurant	1424 Park Road NW	Columbia Heights
<a href="#">Shah's Halal Food</a>	Restaurant	1331 Connecticut Avenue NW	Dupont Circle North
<a href="#">Sleep Number</a>	Retail	12027 Rockville Pike	Rockville Pike
<a href="#">Smoke Shop</a>	Retail	539 8th Street SE	Capitol Hill
<a href="#">Spark Social House</a>	Restaurant	2009 14th Street NW	14th Street Corridor
<a href="#">Speedy Snack</a>	Restaurant	906 F Street NW	East End
<a href="#">Taco Bell</a>	Restaurant	625 H Street NE	Union Market / NoMa
<a href="#">Tatte Bakery &amp; Cafe</a>	Restaurant	12232 Rockville Pike	Rockville Pike
<a href="#">The Box</a>	Retail	2015 14th Street NW	14th Street Corridor
<a href="#">Union Kitchen</a>	Restaurant	430 8th Street SE	Capitol Hill
<a href="#">Warby Parker</a>	Retail	3223 M Street NW	Georgetown

## RECENTLY CLOSED

Name	Type	Address	Submarket
<a href="#">8pizza</a>	Restaurant	705 H Street NW	East End
<a href="#">Aerie</a>	Retail	3235 M Street NW	Georgetown
<a href="#">American in Paris</a>	Retail	1225 King Street	Old Town Alexandria
<a href="#">Be Mighty Fitness</a>	Retail	815 Ellsworth Drive	Downtown Silver Spring
<a href="#">Blank Street Coffee</a>	Restaurant	1807 14th Street NW	14th Street Corridor
<a href="#">Bold Oasis</a>	Retail	2130 8th Street NW	Shaw
<a href="#">BOSS</a>	Retail	800 10th Street NW	East End
<a href="#">Buy Buy Baby</a>	Retail	154 Congressional Lane	Rockville Pike
<a href="#">CHIKO</a>	Restaurant	7280 Woodmont Avenue	Bethesda Row
<a href="#">Damso Korean BBQ</a>	Restaurant	1319 Rockville Pike	Rockville Pike
<a href="#">Dick's Warehouse Sale</a>	Retail	1675 Rockville Pike	Rockville Pike
<a href="#">DSW</a>	Retail	3100 14th Street NW	Columbia Heights
<a href="#">Duke's Grocery</a>	Restaurant	1201 Half Street SE	Capitol Riverfront
<a href="#">Eat Brgz</a>	Restaurant	250 7th Street SE	Capitol Hill
<a href="#">Enigma</a>	Restaurant	1330 U Street NW	14th Street Corridor
<a href="#">Fantastic Sam's</a>	Retail	815-895 Rockville Pike	Rockville Pike
<a href="#">Fight Club</a>	Restaurant	633 Pennsylvania Avenue SE	Capitol Hill
<a href="#">Hidden Gym</a>	Retail	1508 14th Street NW	14th Street Corridor
<a href="#">Hill Country BBQ</a>	Restaurant	406-410 7th Street NW	East End
<a href="#">J. Crew</a>	Retail	3222 M Street NW	Georgetown
<a href="#">Janti Cafe</a>	Restaurant	1826 Wisconsin Avenue NW	Georgetown
<a href="#">Jerry's Subs and Pizza</a>	Restaurant	8517 Colesville Road	Downtown Silver Spring
<a href="#">Le Bonday</a>	Retail	154 Congressional Lane	Rockville Pike
<a href="#">Lost Society</a>	Restaurant	2001 14th Street NW	14th Street Corridor
<a href="#">Lou Lou</a>	Retail	1401 S Street NW	14th Street Corridor
<a href="#">Lou's City Bar</a>	Restaurant	1400 Irving Street NW	Columbia Heights
<a href="#">Lululemon (8 month pop-up)</a>	Retail	3077 M Street NW	Georgetown
<a href="#">McDonald's</a>	Restaurant	11564 Rockville Pike	Rockville Pike
<a href="#">Orangetheory Fitness</a>	Retail	1101 14th Street NW	East End
<a href="#">Palette 22</a>	Restaurant	400 Morse Street NE	Union Market / NoMa
<a href="#">Party City</a>	Retail	1500 Rockville Pike	Rockville Pike
<a href="#">Petco</a>	Retail	3100 14th Street NW	Columbia Heights
<a href="#">Pho Nam</a>	Restaurant	606 King Street	Old Town Alexandria
<a href="#">Pink Taco</a>	Restaurant	100 M Street SE	Capitol Riverfront
<a href="#">Playa Ocho</a>	Restaurant	514 8th Street SE	Capitol Hill
<a href="#">Qargo Coffee</a>	Restaurant	1001 Connecticut Avenue NW	Central Business District
<a href="#">Safeway</a>	Retail	1801 Chapman Ave	Rockville Pike
<a href="#">Sky Valet Shoes</a>	Retail	825 10th Street NW	East End
<a href="#">Spanish Diner</a>	Restaurant	7271 Woodmont Avenue	Bethesda Row
<a href="#">Spartan Surfaces</a>	Retail	1614 14th Street NW	14th Street Corridor
<a href="#">Sushi Gakyo</a>	Restaurant	700 14th Street NW	East End
<a href="#">TGI Friday's</a>	Restaurant	12147 Rockville Pike	Rockville Pike
<a href="#">The Big Stick</a>	Restaurant	20 M Street SE	Capitol Riverfront
<a href="#">Tutti Frutti Frozen Yogurt / Kung Fu Tea</a>	Restaurant	11802 Rockville Pike	Rockville Pike
<a href="#">Verizon Wireless</a>	Retail	30 Maryland Avenue	Rockville Pike
<a href="#">Walgreens</a>	Retail	8701 Georgia Avenue	Downtown Silver Spring
<a href="#">Washington Fine Properties</a>	Retail	7033 Arlington Road	Bethesda Row
<a href="#">We. The Pizza</a>	Restaurant	1301 U Street NW	14th Street Corridor
<a href="#">Whole Foods</a>	Retail	7511 Leesburg Pike	Tysons

# Great Reads

## NATIONAL

[Papa John's unveils franchise model to fuel nationwide expansion](#) by Washington Business Journal

[Buy or leave, Starbucks tells nonpaying customers in policy reversal](#) by The Washington Post

[Joann, 80-Year-Old Crafts and Fabrics Retailer, Will Close All Stores](#) by The New York Times

[What Covid's One-Hit Wonders Should Have Taught Us](#) by The Wall Street Journal

[CVS's New Mini Stores Go All In on Medicine and Skip Everything Else](#) by The Wall Street Journal

[Aldi's Biggest U.S. Expansion Yet: Opening 225+ Stores in 2025](#) by Retail TouchPoints

## DC, VA, MD REGIONAL

[100 Very Best Restaurants 2025](#) by Washingtonian

[As the Power Shifts, D.C. Restaurateurs Are Nervous, and Diplomatic](#) by The New York Times

[Big-box closures are reshaping D.C.-area's retail landscape. It's not bad news.](#) by Washington Business Journal

[\\$500M Spa Resort Chooses D.C. Site For First U.S. Location](#) by Bisnow

[Here Are the 2025 James Beard Awards Restaurant and Chef Semifinalists for D.C.](#) by Eater DC

[How To Dine Like a Washington Insider](#) by Politico

[Regional Economic Snapshot - Spring 2025](#) by Greater Washington Partnership

[The Most Exciting D.C. Restaurant Openings to Look Forward to This Spring](#) by Eater DC

[Workers at Some of DC's Best-Known Restaurants Move to Unionize](#) by Washingtonian

[DC's medical marijuana market set for shake-up as 'gifting' shops transition](#) by MJ Biz Daily

## WASHINGTON, DC NEIGHBORHOODS

[Tishman Speyer's Mazza Gallerie redevelopment to debut](#) by Washington Business Journal

[Nationals unveil concept plans to transform ballpark into year-round entertainment hub](#) by Washington Business Journal

[Monumental Sports claims former Bed Bath, Lucky Strike spots at Gallery Place](#) by Washington Business Journal

[Urgency For Grocery Store Downtown Grows As Residents Begin To Move In](#) by Bisnow

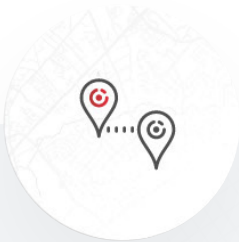
[Jamestown sells stake in Georgetown portfolio to co-owner Acadia Realty Trust](#) by Washington Business Journal

[E Street Cinema, longtime D.C. hub for indie films, closes for good](#) by The Washington Post



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