



W A S H I N G T O N , D C R E T A I L

MARKET REPORT

WINTER 2026

DC Retail Submarkets Snapshot

Market High Street	Units	Inventory (SF)	Vacant (SF)	FALL 2025		WINTER 2026		Shadow ¹ Available (SF)	Shadow Rate (%)	Vacancy +Shadow (%)
				Vacancy Rate (%)	Vacancy Rate (%)	Shadow ¹ Available (SF)				
Georgetown	434	1,709,745 SF	151,242 SF	8.93%	8.85%	33,209 SF	1.94%	10.79%		
M Street	179	894,667 SF	65,983 SF	7.36%	7.38%	13,500 SF	1.51%		8.88%	
Wisconsin Avenue	255	815,078 SF	85,259 SF	10.66%	10.46%	19,709 SF	2.42%		12.88%	
Connecticut Avenue Corridor	299	983,050 SF	195,923 SF	19.05%	19.93%	48,369 SF	4.92%	24.85%		
Central Business District	195	716,836 SF	141,134 SF	18.43%	19.69%	39,766 SF	5.55%		25.24%	
Dupont Circle North	104	266,214 SF	54,789 SF	20.74%	20.58%	8,603 SF	3.23%		23.81%	
East End	530	2,745,991 SF	554,349 SF	20.08%	20.19%	125,180 SF	4.56%	24.75%		
F Street	102	636,824 SF	200,070 SF	34.31%	31.42%	34,442 SF	5.41%		36.83%	
7 th Street NW	130	738,395 SF	130,780 SF	16.34%	17.71%	35,328 SF	4.78%		22.50%	
H Street & City Center	102	371,689 SF	69,187 SF	17.43%	18.61%	2,018 SF	0.54%		19.16%	
11 th Street	27	387,717 SF	24,658 SF	6.36%	6.36%	38,028 SF	9.81%		16.17%	
McPherson	169	611,366 SF	129,654 SF	20.10%	21.21%	15,364 SF	2.51%		23.72%	
Capitol Hill	168	367,696 SF	38,221 SF	10.27%	10.39%	6,986 SF	1.90%	12.29%		
Pennsylvania Avenue SE	76	158,583 SF	15,799 SF	11.63%	9.96%	2,000 SF	1.26%		11.22%	
Barracks Row	92	209,113 SF	22,422 SF	9.23%	10.72%	4,986 SF	2.38%		13.11%	
14th Street Corridor	238	827,531 SF	99,449 SF	11.26%	12.02%	39,025 SF	4.72%	16.73%		
Shaw	269	760,032 SF	102,451 SF	13.20%	13.48%	15,017 SF	1.98%		15.46%	
Chevy Chase	127	1,260,299 SF	373,694 SF	29.55%	29.65%	54,717 SF	4.34%		33.99%	
Capitol Riverfront	195	730,206 SF	117,687 SF	13.89%	16.12%	10,574 SF	1.45%		17.57%	
Clarendon	196	963,374 SF	81,920 SF	7.97%	8.50%	52,913 SF	5.49%		14.00%	
Old Town Alexandria	250	715,910 SF	52,115 SF	6.81%	7.28%	63,822 SF	8.91%		16.19%	
Tysons	277	2,315,083 SF	201,698 SF	7.59%	8.71%	43,507 SF	1.88%		10.59%	
Bethesda Row	130	466,995 SF	8,589 SF	1.30%	1.84%	4,398 SF	0.94%		2.78%	
Rockville Pike	642	3,854,117 SF	444,103 SF	11.97%	11.52%	169,201 SF	4.39%		15.91%	
Downtown Silver Spring	262	1,289,162 SF	127,247 SF	9.93%	9.87%	43,460 SF	3.37%		13.24%	
Columbia Heights	139	729,212 SF	86,913 SF	12.11%	11.92%	14,750 SF	2.02%		13.94%	
Union Market / NoMa	212	1,001,828 SF	170,849 SF	16.96%	17.05%	4,880 SF	0.49%		17.54%	
Totals	4368	20,720,007 SF	2,805,450 SF	13.28%	13.54%	730,008 SF	3.52%	17.06%		

¹ 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 TH STREET CORRIDOR	3	3	6	8	2	10	2	3	5
BETHESDA ROW	-	2	2	-	1	1	1	-	1
CAPITOL HILL	2	1	3	8	-	8	2	1	3
CAPITOL RIVERFRONT	2	-	2	4	5	9	4	-	4
CENTRAL BUSINESS DISTRICT	1	1	2	3	2	5	2	-	2
CHEVY CHASE	-	4	4	3	4	7	1	-	1
CLARENDON	3	1	4	4	2	6	1	-	1
COLUMBIA HEIGHTS	-	-	-	4	1	5	-	-	-
DOWNTOWN SILVER SPRING	1	-	1	4	-	4	1	-	1
DUPONT CIRCLE NORTH	1	2	3	-	-	-	2	-	2
EAST END	5	2	7	7	7	14	5	2	7
GEORGETOWN	2	12	14	11	6	17	1	3	4
OLD TOWN ALEXANDRIA	2	4	6	7	1	8	-	1	1
ROCKVILLE PIKE	4	8	12	14	7	21	4	3	7
SHAW	3	1	4	9	1	10	1	3	4
TYSONS	1	1	2	8	4	12	-	1	1
UNION MARKET / NOMA	2	1	3	8	5	13	1	-	1
TOTAL	32	43	75	102	48	150	28	17	45



Openings & Closings Along DC High Streets

RECENTLY OPENED

Name	Type	Address	Submarket	Name	Type	Address	Submarket
Akino Sushi Bar & Thai Restaurant	Restaurant	611 King Street	Old Town Alexandria	Maman	Restaurant	2055 15th Street N	Clarendon
Alo Yoga	Retail	814-816 King Street	Old Town Alexandria	Maman	Restaurant	701 King Street	Old Town Alexandria
Awakening Bar and Grill Inc	Restaurant	520 8th Street SE	Capitol Hill	Mamma Dos	Restaurant	1275 K Street NW	East End
Beauty Spot by Elena	Retail	11751 Rockville Pike	Rockville Pike	Meow Claw	Retail	1701-1765 Rockville Pike	Rockville Pike
Berry Bros. & Rudd	Retail	888 17th Street NW	Central Business District	Miniso	Retail	12266 Rockville Pike	Rockville Pike
Boll & Branch	Retail	7280 Woodmont Avenue	Bethesda Row	Monos	Retail	3124 M Street NW	Georgetown
Cafe Joy	Restaurant	906 P Street NW	Shaw	Mugsy Jeans	Retail	3110-3112 M Street NW	Georgetown
California Fish Grill	Restaurant	12236-12250 Rockville Pike	Rockville Pike	MZ Wallace (LEAP)	Retail	1246 Wisconsin Avenue NW	Georgetown
Churasuko	Restaurant	1747 Tysons Central Street	Tysons	Nunumia Boutique	Retail	1610 Wisconsin Avenue NW	Georgetown
Citibank	Retail	7170 Woodmont Avenue	Bethesda Row	Ocean Island Massage Spa	Retail	798-804 Rockville Pike	Rockville Pike
CityVet	Retail	5425 Wisconsin Avenue NW	Chevy Chase	Olivia Macaron + Cocktail Bar	Restaurant	405 Morse Street NE	Union Market / NoMa
Collars & Co (pop up)	Retail	154 Congressional Lane	Rockville Pike	On Running	Retail	1211 Wisconsin Avenue NW	Georgetown
Cottage House Ethiopian Cuisine	Restaurant	1529 Wisconsin Avenue NW	Georgetown	Paul Frederick (LEAP)	Retail	2922 M Street NW	Georgetown
Cucine Lube	Retail	5301 Wisconsin Avenue NW	Chevy Chase	Pubkey Bar and Media House	Restaurant	406-410 7th Street NW	East End
Darband Kabob	Restaurant	785 Rockville Pike	Rockville Pike	Raising Canes'	Restaurant	700-734 7th Street NW	East End
Dave's Hot Chicken	Restaurant	11564 Rockville Pike	Rockville Pike	Realm Rooftop Bar & Lounge	Restaurant	899 O Street NW	Shaw
Ebbee's Corner Bar	Restaurant	1840 6th Street NW	Shaw	SABA1 Thai-Lao	Restaurant	1610 20th Street NW	Dupont Circle North
FH Convenience Store	Retail	1722-1724 Connecticut Avenue NW	Dupont Circle North	Saint Helens Leatherworks	Retail	1262 5th Street NE	Union Market / NoMa
GameOn bar + arcade	Restaurant	1330 U Street NW	14th Street Corridor	Sandlot - Downtown	Retail	555 12th Street NW	East End
Glowbar	Retail	1220 North Fillmore Street	Clarendon	Sook	Restaurant	1346 T Street NW	14th Street Corridor
Go Fresh 365	Retail	1801 Chapman Ave	Rockville Pike	Springbone	Restaurant	1426 Wisconsin Avenue NW	Georgetown
Goodie Lounge	Restaurant	222 M Street NE	Union Market / NoMa	Sugared + Bronzed	Retail	1711 14th Street NW	14th Street Corridor
Goodlove Lounge	Restaurant	1100 15th Street NW	East End	Swarovski	Retail	1238 Wisconsin Avenue NW	Georgetown
Goole Store	Retail	3235 M Street NW	Georgetown	Taco Bell	Restaurant	411 8th Street SE	Capitol Hill
Hermes (temp space)	Retail	800 10th Street NW	East End	Tanisha	Retail	8065 Leesburg Pike	Tysons
Hosu	Retail	1515 Wisconsin Avenue NW	Georgetown	Taqueria Xochi	Restaurant	300 Tingey Street SE	Capitol Riverfront
Ikea	Retail	3307-3311 M Street NW	Georgetown	TD Bank	Retail	515 King Street	Old Town Alexandria
Ingle Korean Steakhouse	Restaurant	1916-1934 14th Street NW	14th Street Corridor	Terra Gaucha Brazilian Steakhouse	Restaurant	1600 Rockville Pike	Rockville Pike
Insomnia Cookies	Restaurant	8455 Fenton Street	Downtown Silver Spring	The DRIPBar	Retail	1720 Wisconsin Avenue NW	Georgetown
Interior Instincts	Retail	1124 King Street	Old Town Alexandria	TileBar	Retail	1526 14th Street NW	14th Street Corridor
ISLA	Restaurant	1100 15th Street NW	East End	Total Wine	Retail	5300 Wisconsin Avenue NW	Chevy Chase
Jilly's Pilates	Retail	1710 Connecticut Avenue NW	Dupont Circle North	Trader Joe's	Retail	5335 Wisconsin Avenue NW	Chevy Chase
Joola Store	Retail	915 Meeting Street	Rockville Pike	Urban Mart	Retail	1845 7th Street NW	Shaw
JoyLife SPA	Retail	1600 King Street	Old Town Alexandria	Van Leeuwen Ice Cream	Restaurant	2815-2879 Clarendon Boulevard	Clarendon
Kilwins	Restaurant	3101 Wilson Boulevard	Clarendon	Verizon Wireless	Retail	30 Maryland Avenue	Rockville Pike
Lil Sweet Treat	Retail	3285 M Street NW	Georgetown	Warby Parker	Retail	1350 R Street NW	14th Street Corridor
Little District Books	Retail	631 Pennsylvania Avenue NE	Capitol Hill	Wonder	Restaurant	1331 Yards Place SE	Capitol Riverfront
Lucky Bar	Restaurant	1221 Connecticut Avenue NW	Central Business District				

RECENTLY CLOSED

Name	Type	Address	Submarket	Name	Type	Address	Submarket
14th Street Cafe Asian Bistro	Restaurant	1416 14th Street NW	14th Street Corridor	McEarney Associates Realtors	Retail	1803 14th Street NW	14th Street Corridor
Across the Pond Irish Restaurant	Restaurant	1734 Connecticut Avenue NW	Dupont Circle North	Meow Claw	Retail	1701-1765 Rockville Pike	Rockville Pike
Aesop	Retail	1924 8th Street NW	Shaw	Metier & Bar	Restaurant	1015 7th Street NW	East End
Avenue Title	Retail	1600 14th Street NW	14th Street Corridor	Mugsy Jeans (LEAP)	Retail	2922 M Street NW	Georgetown
Basebowl	Restaurant	1201 Half Street SE	Capitol Riverfront	Outback Steakhouse	Restaurant	8661 Colesville Road	Downtown Silver Spring
Bluestone Lane	Restaurant	1150 Connecticut Avenue NW	Central Business District	Patrick's Elegant Living	Retail	1800 International Drive	Tysons
Brompton Bikes	Retail	1214 Wisconsin Avenue NW	Georgetown	Paul	Restaurant	1275 K Street NW	East End
Buffalo Wild Wings	Restaurant	30 Maryland Avenue	Rockville Pike	PetWell Clinic	Retail	11802 Rockville Pike	Rockville Pike
BurgerFi	Restaurant	11881 Grand Park Avenue	Rockville Pike	Pho Junkies	Restaurant	1025 1st Street SE	Capitol Riverfront
Chicken + Whiskey	Restaurant	70 N Street SE	Capitol Riverfront	Puff Puff Pass	Retail	1853 7th Street NW	Shaw
Come Say High	Retail	1015 1/2 7th Street NW	East End	Roy Rogers	Restaurant	718 Rockville Pike	Rockville Pike
CVS	Retail	717 14th Street NW	East End	Savan Liquors	Retail	1414 14th Street NW	14th Street Corridor
Flirt Cocktail Bar and Social Club	Restaurant	1015 1/2 7th Street NW	East End	Seamore's	Restaurant	2800 Clarendon Boulevard	Clarendon
Gyroland	Restaurant	1701-1765 Rockville Pike	Rockville Pike	Shakers	Restaurant	2012 9th Street NW	Shaw
Joy by Seven Reasons	Restaurant	5471 Wisconsin Avenue NW	Chevy Chase	Shilling Canning Company	Restaurant	1331 4th Street SE	Capitol Riverfront
Jumbo Pizza	Restaurant	1344 U Street NW	14th Street Corridor	Sprinkles	Restaurant	3015 M Street NW	Georgetown
Kinship	Restaurant	1015 7th Street NW	East End	Sweaty Betty (pop-up)	Retail	3251 M Street NW	Georgetown
La Bise	Restaurant	800 Connecticut Avenue NW	Central Business District	Tako Grill	Restaurant	4914 Hampden Lane	Bethesda Row
Lincoln Restaurant	Restaurant	110 Vermont Avenue NW	East End	TD Bank	Retail	119 South Washington Street	Old Town Alexandria
Little District Books	Retail	737 8th Street SE	Capitol Hill	Thaiverse	Restaurant	1610 20th Street NW	Dupont Circle North
Lunas de Buenos Aires	Restaurant	1276 5th Street NE	Union Market / NoMa	The Ugly Mug	Restaurant	723 8th Street NE	Capitol Hill
Mario Furniture Showroom	Retail	725 Rockville Pike	Rockville Pike	Union Kitchen	Retail	1251 9th Street NW	Shaw
				Valor Bar	Restaurant	723 8th Street SE	Capitol Hill

2025 Retail & Restaurants: Closing & Opening

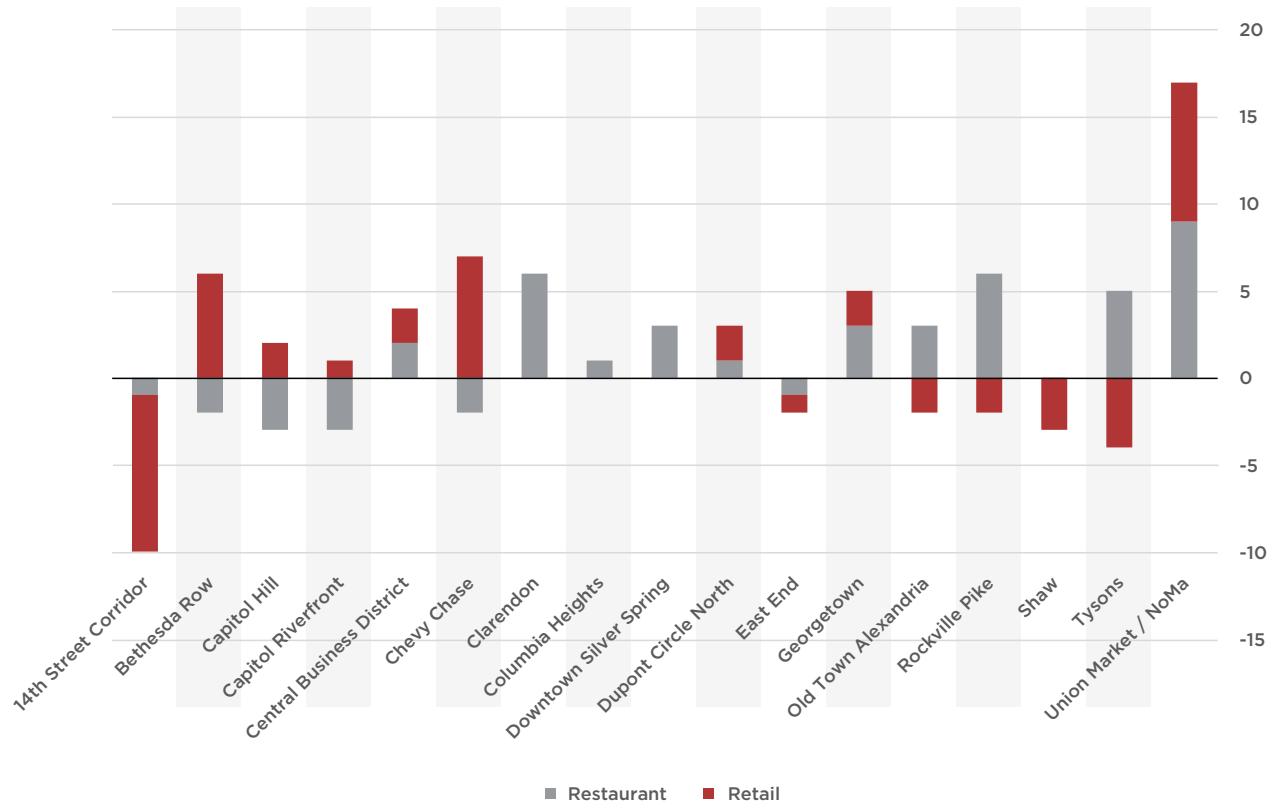
RESTAURANT

	Closing					Opening				Total
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Total	Q1 2025	Q2 2025	Q3 2025	Q4 2025	
14th Street Corridor	5	2	4	2	13	4	2	3	3	12
Bethesda Row	2			1	3			1		1
Capitol Hill	3	2	3	2	10	1	2	2	2	7
Capitol Riverfront	3	1		4	8	1	2		2	5
Central Business District	1	2	2	2	7	1	4	3	1	9
Chevy Chase			1	1	2					
Clarendon			1	1	2		1	4	3	8
Columbia Heights	1		1		2		3			3
Downtown Silver Spring	1		1	1	3	1	2	2	1	6
Dupont Circle North			1	2	3	1	1	1	1	4
East End	3	4	7	5	19	4	5	4	5	18
Georgetown	2	4	4	1	11	3	3	6	2	14
Old Town Alexandria	1		2		3	1		3	2	6
Rockville Pike	4	1	3	4	12	3	6	5	4	18
Shaw		4	1	1	6	1	2		3	6
Tysons		1	2		3	3	2	2	1	8
Union Market / NoMa	1	3		1	5	2	5	5	2	14
Grand Total	27	24	33	28	112	29	37	41	32	139

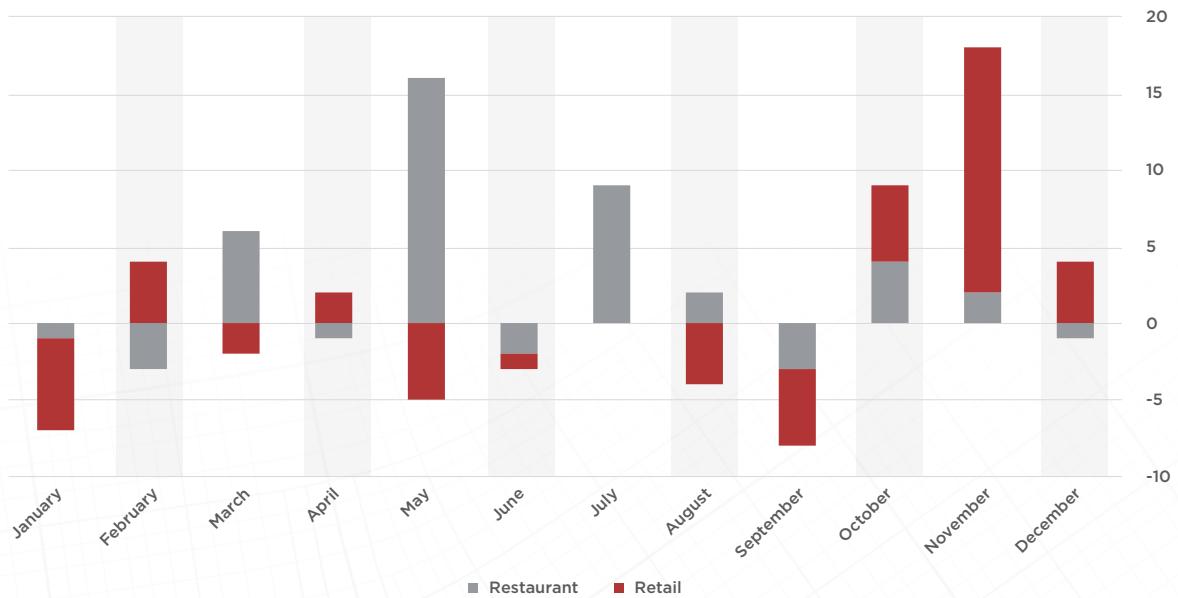
RETAIL

	Closing					Opening				Total
	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Total	Q1 2025	Q2 2025	Q3 2025	Q4 2025	
14th Street Corridor	4	4	5	3	16	3	1	3		7
Bethesda Row	1		1		2	2	1	3	2	8
Capitol Hill				1	1	2			1	3
Capitol Riverfront			1		1	2			1	2
Central Business District		1	1		2		1	2	1	4
Chevy Chase			1		1	1	1	2	4	8
Clarendon		2	1		3		2		1	3
Columbia Heights	2				2			2		2
Downtown Silver Spring	2	1	2		5	2	1	2		5
Dupont Circle North		1	1		2		1	1	2	4
East End	4	5	1	2	12	2	5	2	2	11
Georgetown	5	9	9	3	26	4	3	9	12	28
Old Town Alexandria	2	4	2	1	9		3		4	7
Rockville Pike	8	4	3	3	18	3	5		8	16
Shaw	3		2	3	8	2	2		1	5
Tysons	1	2	3	1	7	1	4	2	1	3
Union Market / NoMa		2	2		4	4	5	2	1	12
Grand Total	32	35	35	17	119	28	31	26	43	128

2025 Net Openings by Submarket



2025 Net Openings by Month



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NATIONAL

- [&pizza acquires Tex-Mex chain Tijuana Flats, launches new holding company for more deals](#) by Washington Business Journal
- [Craft Breweries Struggle as Sales and Appetites Wane](#) by The New York Times
- [Get Ready, America: Here Come China's Food and Drink Chains](#) by The New York Times
- [Opening a Restaurant in New York is No Picnic. Here's What it Takes](#) by The New York Times
- [Top 100 Independents 2025](#) by Restaurant Business

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- [Five questions to a developer: EastBanc principal 'optimistic' on DC retail market next year](#) by CoStar News
- [Is This the Haphazard End of Streeteries in DC?](#) by Washingtonian
- [Meet The Washington Post's new food critic](#) by The Washington Post
- [No new Michelin stars for D.C. restaurants this year](#) by Axios D.C.
- [The 40 best restaurants in and around D.C.](#) by The Washington Post
- [The DC Restaurant Trump Slump](#) by Washingtonian

WASHINGTON, DC NEIGHBORHOODS

- [A meditation on Columbia Heights' DC USA](#) by Greater Greater Washington
- [An "urban mall" for local businesses is coming to H Street](#) by Axios D.C.
- [Capital One Arena's glow-up: New eats, tech and luxe lounges](#) by Axios D.C.
- [Carmine's, Rasika owners buy their D.C. restaurant spaces](#) by Washington Business Journal
- [Netflix to bring entertainment hub, offices to historic Woodies Building](#) by Washington Business Journal
- [Over 100 New Restaurants Opened in 2025; Here's the Full List](#) by The MoCo Show
- [RPM Steak and RPM Events sign big lease for Market Square in D.C.](#) by Washington Business Journal
- [Solaire Social food hall team blames Silver Spring's challenging market conditions](#) by Washington Business Journal
- [Washington Improv Theater Finds a New Forever Home](#) by Washington City Paper
- [Eataly inches closer to Tysons Corner Center location](#) by Washington Business Journal
- [Trader Joe's Opens in Friendship Heights, Continuing Retail Growth](#) by FriendshipHeights.com
- [Amid 'uncertainty and chaos,' Montgomery County examines the health of retail](#) by WTOP News
- [These Beloved Retailers Permanently Closed In VA In 2025](#) by Patch.com



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