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Grocery Market Alert
Dallas, TX

Grocery Market Insights

OVERVIEW & KEY TAKEAWAYS

- The Dallas-Fort Worth-Arlington, TX, MSA is the fourth largest MSA in the nation, behind only New York, Los Angeles, and Chicago. Comprised of 11 populous counties, the titular cities reside in the core counties of Dallas and Tarrant. Over 8.4 million people call “The Metroplex” home.
- The metro is one of the fastest growing regions, with growth over the past two years near 4%, which is what growth is projected to be over the next 5 years as well. There is no majority ethnic group, with 44% of the population White, 29% Hispanic, 15% Black, and 12% Asian/Other. More than 38% of the population has a Bachelor’s or higher degree, exceeding the national average.
- The DFW MSA has the 5th largest GDP in the country, at $613 billion, behind only the three larger MSAs and the San Francisco MSA.[1] The economy is a broad collection of sectors, notably technology, telecommunications, healthcare, and higher education. Energy has been a major sector as well, but the Metroplex has become less reliant on that, particularly compared to Houston, the Texas metro 200 miles to the south.
- Top employers include Lockheed Martin, Bank of America, General Motors, and Raytheon, along with numerous healthcare centers and institutes of higher education.[2] As of 2025, 19 Fortune 500 companies are headquartered here (6th most of MSAs), including AT&T, Caterpillar, American Airlines, CBRE, Charles Schwab, Texas Instruments, and Southwest Airlines.[3]
- As expected for such a demographically and economically healthy region, the grocery environment for the DFW metro is quite robust. Walmart and Kroger account for a third of the grocery share, particularly when the Neighborhood Markets are brought into the fold. Safeway (as Tom Thumb) and Albertsons (with its traditional banner and upscale Market Street banner) account for almost 10% of the market share. Meanwhile, HEB, which had about 1.3% market share just four years ago with 6 Central Markets, accounts for more than 7% today with 21 stores under their varying banners. The San Antonio grocer is also the fastest growing, with perhaps 32 more stores and 1.9 million square feet of sales area in various stages of planning, and with various degrees of certainty.

CHAIN MARKET COMPARISON

Current (2025) Market Sales & Future Market Banner Growth

Chain Name	Number of Stores	Total Volume Weekly	Total Sales Area	Average Volume Weekly	Average Sales Area	Average $/Sq Ft	Total Annual Volume	Market Share	No. of Planned Stores	Added Sales Area	Chain Percent SF Change	Projected Number of Stores	Projected Sales Area
Walmart SC	97	[redacted]					$5,521,620,000	17.05%	[redacted]				
Kroger	94						$4,182,880,000	12.92%					
HEB	21						$2,357,940,000	7.28%					
Tom Thumb	67						$1,946,119,396	6.01%					
Costco	15						$1,567,280,000	4.84%					
Sam's Club	24						$1,540,500,000	4.76%					
Walmart NM	44						$1,209,000,000	3.73%					
Target	50						$892,398,000	2.76%					
Albertsons	31						$787,280,000	2.43%					
Fiesta Mart	27						$628,160,000	1.94%					
Aldi	62						$618,540,000	1.91%					
Other	69						$538,980,000	1.66%					
El Rancho Supermercado	19						$529,880,000	1.64%					
Whole Foods	14						$501,280,000	1.55%					
Sprouts	33						$490,848,488	1.52%					
WinCo	10						$455,780,000	1.41%					
Market Street	9						$450,320,000	1.39%					
Brookshire's	19						$395,200,000	1.22%					
Trader Joe's	10						$337,194,000	1.04%					
El Rio Grande	9						$200,720,000	0.62%					
La Michoacana	37						$174,024,344	0.54%					
H Mart	2						$78,000,000	0.24%					
Savers Cost Plus	5						$74,620,000	0.23%					
Foodland	8						$72,020,000	0.22%					
99 Ranch Market	3						$57,200,000	0.18%					
Cash Saver Cost Plus	5						$56,680,000	0.18%					
Supermercado Monterrey	8						$56,680,000	0.18%					
La Azteca	8						$52,000,000	0.16%					
Natural Grocers	7						$42,120,000	0.13%					
Brookshire Brothers	7						$34,060,000	0.11%					
India Bazaar	8						$32,500,000	0.10%					
Lidl	0						$0	0.00%					
Totals	822	$497,727,389	28,976,952				$25,881,824,228	79.93%	100	3,980,400	13.74%	922	32,957,352
Averages				$605,508	35,252	$17.18							

Complete our brief Contact Us form to receive the full, unredacted report with detailed sales volumes.

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Note: All numbers reflect Food Group data only, and are as of 2025. Market share totals exclude leakage. Future store openings include rumored, planned, and proposed stores that are being monitored

[1] Source: “Real Gross Domestic Product (GDP) (Thousands of chained 2017 dollars),” Bureau of Economic Analysis 2023 data, 2024. [2] Source: Dallas Business Journal. [3] Source: Fortune, 2024.

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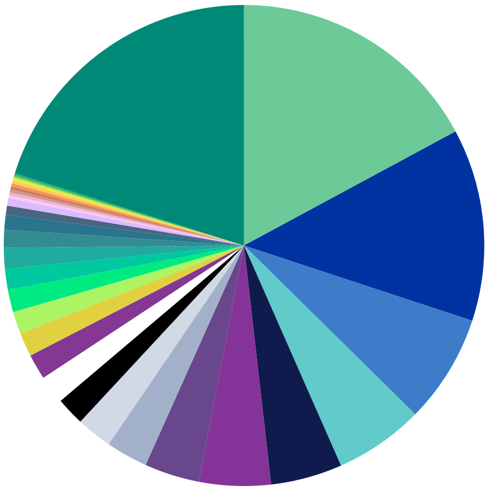
CURRENT MARKET SHARE & EXPECTED GROWTH

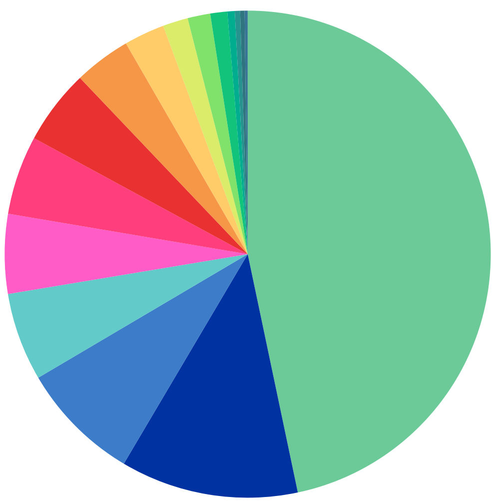
Share of Supermarket Sales, Current (2025)



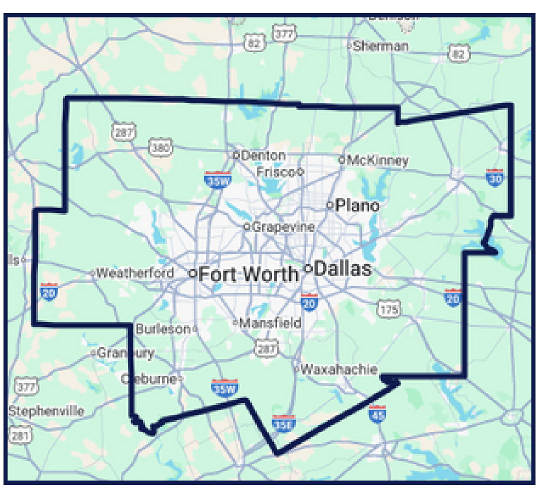
Banner	Market Share
Walmart SC	17.1%
Kroger	12.9%
HEB	7.3%
Tom Thumb	6.0%
Costco	4.8%
Sam's Club	4.8%
Walmart NM	3.7%
Target	2.8%
Albertsons	2.4%
Fiesta Mart	1.9%
Aldi	1.9%
Other	1.7%
El Rancho Supermercado	1.6%
Whole Foods	1.5%
Sprouts	1.5%
WinCo	1.4%

Banner	Market Share
Market Street	1.4%
Brookshire's	1.2%
Trader Joe's	1.0%
El Rio Grande	0.6%
La Michoacana	0.5%
H Mart	0.2%
Savers Cost Plus	0.2%
Foodland	0.2%
99 Ranch Market	0.2%
Cash Saver Cost Plus	0.2%
Supermercado Monterrey	0.2%
La Azteca	0.2%
Natural Grocers	0.1%
Brookshire Brothers	0.1%
India Bazaar	0.1%
[Leakage]	20.1%

Growing Banners, by Sales Area



Banner	Banner
HEB	H Mart
Lidl	Sprouts
Kroger	Whole Foods
Other	Albertsons
Walmart SC	La Michoacana
Tom Thumb	India Bazaar
Costco	Aldi
Target	Trader Joe's



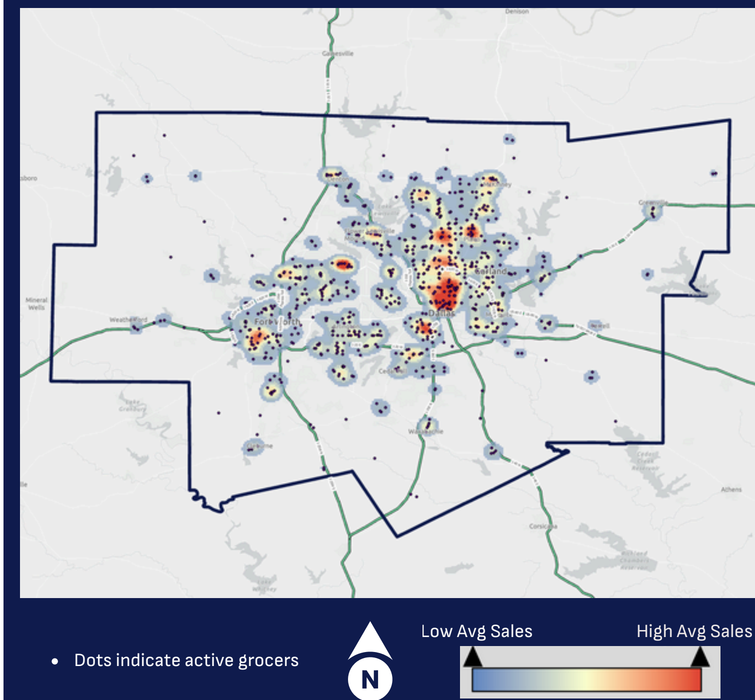
Dallas-Fort Worth, TX, Metro Key Demographics

- Total Population: 8,415,176
- Projected Pop Growth (5yr): 4.0%
- Total Households: 3,031,969
- Median HH Income: $95,615
- Average HH Income: $135,870
- Bachelor's or Higher: 38.2%
- Total Number of Grocery Stores in Market (2025): 822
- Total Number of Projected Grocery Stores (2029): 922
- Major Grocer Weekly Sales in Market (2025): $497.7M

Areas of High-Performing Grocers

- The largest area of high-performing grocery stores is immediately north and northeast of downtown Dallas, including the Oak Lawn, Highland park, and University Park neighborhoods, as well as the Hispanic grocers just east of US75 in Vickery Meadow. This area extends as far north as Walnut Hill Ln and includes several Tom Thumb (Safeway) and Kroger stores, and multiple locations of Whole Foods, Trader Joe's, and Sprouts, as well as a Central Market (HEB) and the aforementioned Hispanic grocers to the east.
- Other hotspots on the Dallas side of the Metroplex include the eastern portion of Plano along US75 from Parker to Spring Valley Rd, a stretch that host Target, Costco, and Walmart, along with a collection of ethnically-focused grocers like 99 Ranch, H Mart, and Fiesta Mart. In Western Plano, centered along Preston Rd and Park Blvd, is another node with Whole Foods, Trader Joe's, and one of the new HEB locations at its heart.
- Just southwest of downtown Dallas is a small concentration of high-performing grocers, which is a somewhat surprising collection of mostly Hispanic grocers and discounters. A single representative from Kroger, Tom Thumb, and Aldi round out this area's offerings
- On the Fort Worth side of the Metroplex there are two notable areas of robust grocer operations. To the northeast of town, Grapevine and Southlake hosts a solid node, with a Central Market and Trader Joe's alongside conventional, club, and supercenter formats. A less intense node is found to the southwest, in proximity to Hulen Mall.

Areas with Concentrated High Performing Stores



Grocer Spotlight: H-E-B

HEB is the quintessential Texan grocer in many communities, particularly in Central Texas; but it is a relatively new arrival to the Metroplex. It opened its first Central Market in Fort Worth in 2001, followed by additional stores in Plano and Dallas the following year. Central Market is a quality/service format store with significant space dedicated to prepared foods and a variety of organic and epicurean offerings. It wasn't until 2022 that HEB opened its first mainline HEB-branded store, which was in Frisco. Today, the grocer operates 21 stores throughout the metroplex, including its discount format, Joe V's Smart Shop, and its larger format HEB Plus (stylized as HEBPlus!), which feels more like a supercenter format.

HEB's story began in 1905 when Florence Thornton Butt opened a grocery store in Kerrville, Texas. Her youngest son, Howard Edward Butt, took over the store and began expanding it over the years. finding success first in the Rio Grande Valley then Corpus Christi. In 1942, it opened its first store under its leader's initials, H.E.B., doing so in San Antonio. Four years later, the company was formally renamed H-E-B, and in 1985 the chain officially moved its headquarters to San Antonio, where it is headquartered today.[1]

With a reported $46.5 billion in revenue and 170,000 employee, H-E-B Grocery Company is the fifth largest private company in the US. It is the largest private company in Texas, and the second largest private grocer in the US, behind Publix at #3.[2] Today, it operates more than 450 stores, with a little over 60 stores found in several northern states of Mexico, and the rest in Texas, from the Rio Grande to the Red River, and as far west as Odessa.

Quick Facts	
Headquarters	San Antonio, TX
Established	1905
Ownership	Privately-owned
In the MSA:	
Date of Entry in Metro	2001, 2022
Number of Stores	HEB: 12 Central Market: 6 Joe V's: 2 HEB Plus: 1
Total Sales Area (sf)	1,299,500
Average Sales/Wk	[redacted]
Highest Store Sales/Wk	
Lowest Store Sales/Wk	
Market Share	7.3%
Format	Conventional, Quality/Service, Discount

In Dallas, the 12 namesake HEB stores are massive supermarkets that straddle the line between conventional and quality/service. They are about 100,000 sf in size, with about 72,000 sf in sales area. In addition to the expansive produce section and other food and service departments, they include a pharmacy, an in-store BBQ restaurant, and an out-parcel gas station. They have a little more general merchandise than what you might find in a typical supermarket, but less than you'd find in the 126,000 sf HEB Plus format. Chainwide, the grocer has made an effort to capitalize on its Texas roots with marketing and signage and with the food offerings and its supplier relationships. This tactic has proven highly successful with its Texan customers.

The Company had been taking a measured approach to populating the Dallas area, preferring to situate its stores in the cities and communities outside of Dallas proper, with the sole exception being its Central Market banner. Perhaps bolstered by its success throughout the metro, in mid-January the Company bought a nearly 10-acre property on the southeast corner of Hillcrest Rd and Loop 635 for development. Once complete, this would be the first namesake store in the City of Dallas. We have tracked rumors and proposals for as many as 31 other potential new stores in the Metroplex that could come to fruition. Many of these are nothing more than rumors or sites of casual interest that may never come to pass; regardless, the recent growth, the known future sites, and the overall noise surrounding the Texas grocer has proven it to be by far the most aggressive grocer in the market and the one to watch.

[1] Source: "The History of H-E-B," Texas State Historical AssociationAldi.com. [2] Source: "America's Top Private Companies," Forbes, 2024.