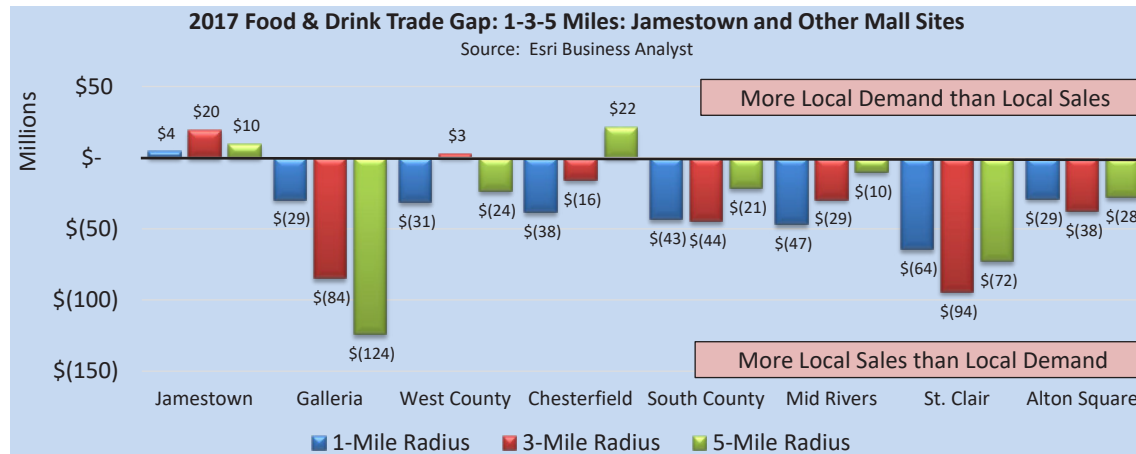


Keep in mind, of course, that, in Jamestown Mall's case, retailing is quite heavily dominated by the City of Florissant, and most of that is along Lindbergh Boulevard not far west of Jamestown. This concentration of retail spreads further into Hazelwood along Lindbergh and is certainly reinforced here and there along I 270. Florissant benefits from about twice as much retail sales than its own population can support. Much of North County is dependent, therefore, on the many convenient retail offerings of Florissant and Lindbergh Boulevard, but none of those offerings are in regional malls.

FOOD AND DRINK: DEMAND AND SUPPLY GAP: 2017

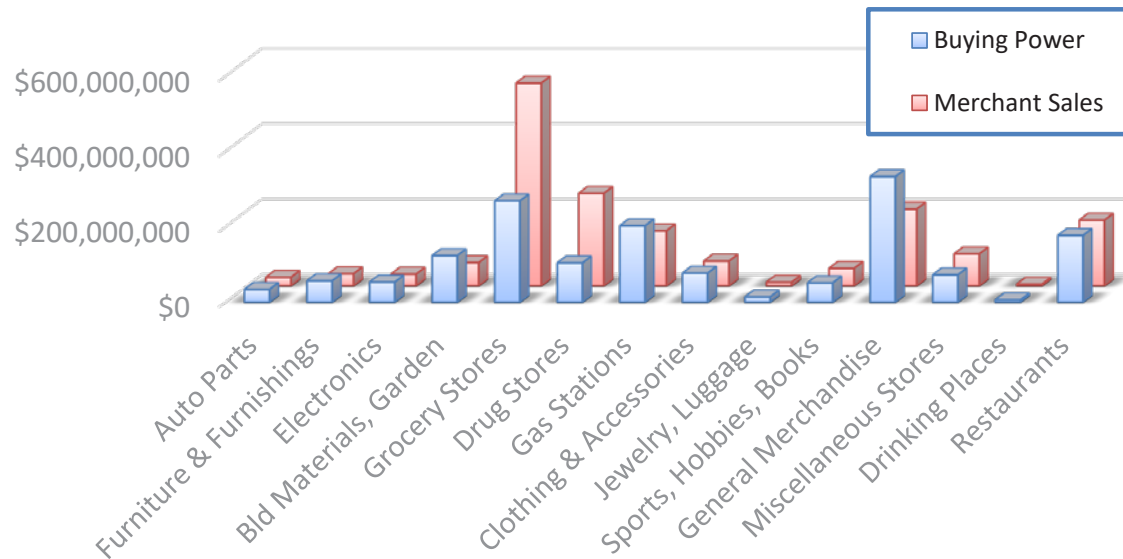


Much the same is true for the food and drink markets (restaurants and bars, not food and drink at home). These areas that are centered on regional malls have no economic need for additional places to eat and drink. An important exception, though at a relatively small scale, is Jamestown Mall. All three radii could support more dining and drinking experiences. As it is, some of the demand from this area must now spend its money outside the radii.

NORTH COUNTY IS NOT DEVOID OF RETAIL OPTIONS

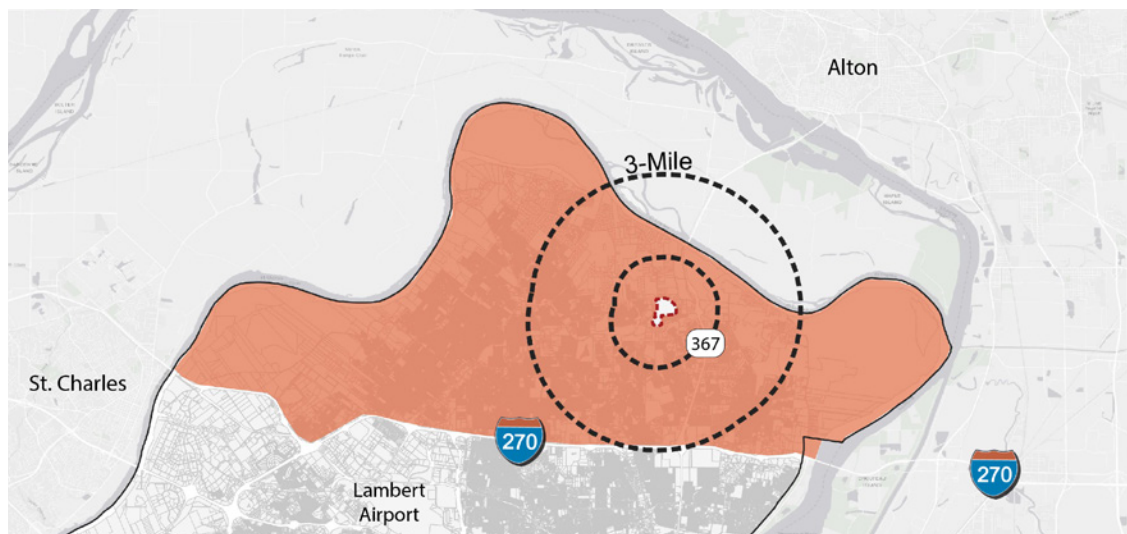
Annual Retail Buying Power & Sales, North St. Louis County

Source: Esri

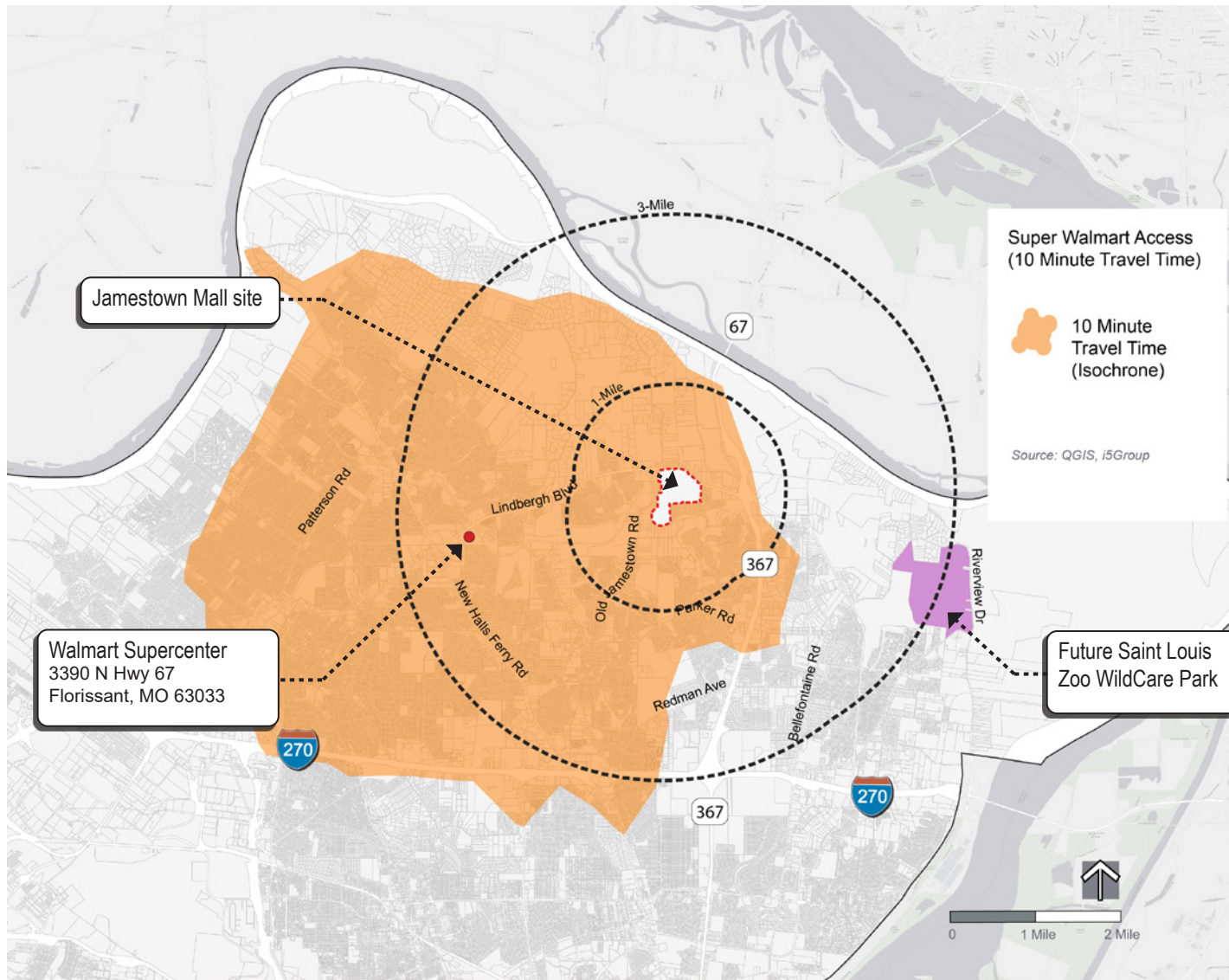


Despite no nearby “mall,” North County (shown here north of I-270) has no shortage of retail stores, but there is room for more eating and drinking places. Again using 2017 data, retail sales in North County exceeded household demand from North County residents by some \$450 million, enough to support almost 100 retailers at average sales-per-store. That is, the equivalent of 100 average stores are supported by non-North County shoppers.

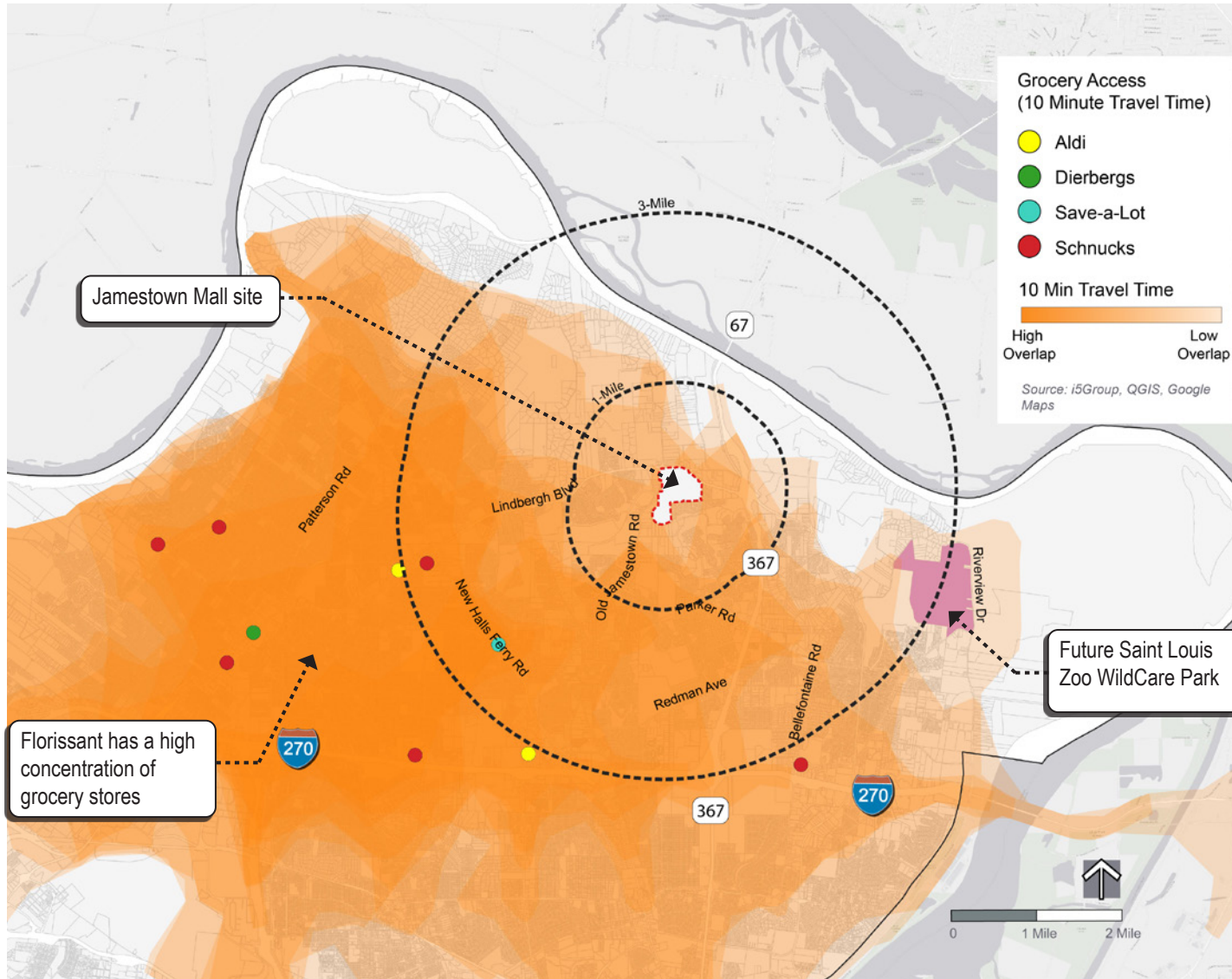
Demand exceeds sales, however, for eating and drinking places by the equivalent of about ten additional establishments.



WALMART: 10 MINUTE DRIVE TIME AREA



EXISTING GROCERY STORES: 10 MINUTE DRIVE TIME AREA



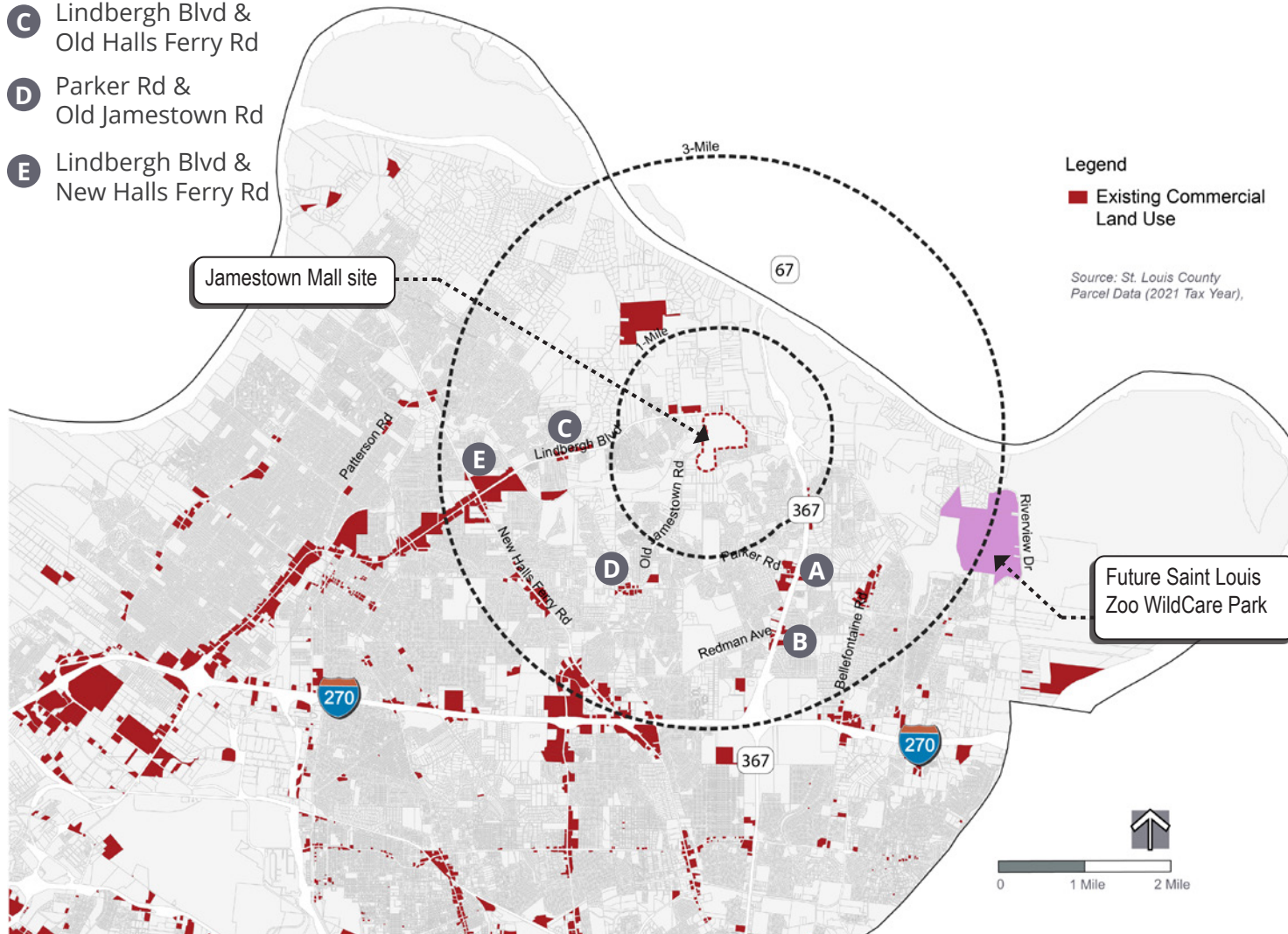
The map on this page shows major grocery stores north of I-270 and the 10-minute drive area to each store.

While Florissant has a high concentration of grocery stores, there are no major grocery stores north of New Halls Ferry Road and Redman Avenue. These areas are mostly within a 10-minute drive of a store, but have more limited options than compared to other parts of north county. In addition, walkable or transit options are especially limited.

This map only includes traditional stand alone grocery stores. It does not include other retail outlets (such as the Walmart Supercenter and Target in Florissant) that carry groceries.

EXISTING COMMERCIAL AREAS: EVALUATION OF DEVELOPMENT OPPORTUNITIES

- A** Hwy 367 & Parker Rd
- B** Hwy 367 & Redman Rd
- C** Lindbergh Blvd & Old Halls Ferry Rd
- D** Parker Rd & Old Jamestown Rd
- E** Lindbergh Blvd & New Halls Ferry Rd



The Jamestown Mall site is not the only opportunity area for retail and commercial development. There are many existing commercial nodes in north St. Louis County.

The following pages examine five of the closest commercial nodes to the Jamestown Mall site for opportunities for new development. The categories of opportunities include:

- Available Building Space
- Site Ready
- Greenfields
- Demolition or Rehabilitation

The two existing commercial nodes along Highway 367 include **over 25 acres of potential development opportunity.**

EXISTING COMMERCIAL AREAS: OPPORTUNITY AREA DEFINITIONS

Available Building Space

Available vacant building space.



Site Ready

Out parcel or other vacant parcel within or near an existing development. Current grading (topography) for development and assumed to be site ready.



Greenfields

Nearby greenfields (vacant) likely suitable for development based on existing aerial photographs and topography. Utilities, ownership, and other factors are unknown.



Demolition or Rehabilitation

Existing buildings or remains of past development will require demolition or extensive rehabilitation.



A. HWY 367 & PARKER ROAD: OPPORTUNITY AREAS

Available Building Space **Site Ready** **Greenfields**

Large-Medium Box
50,000 SF

Small
1,200 SF
900 SF
1,800 SF
2,400 SF
1,200 SF
1,200 SF
5,040 SF

Total Building Space: 63,740 SF

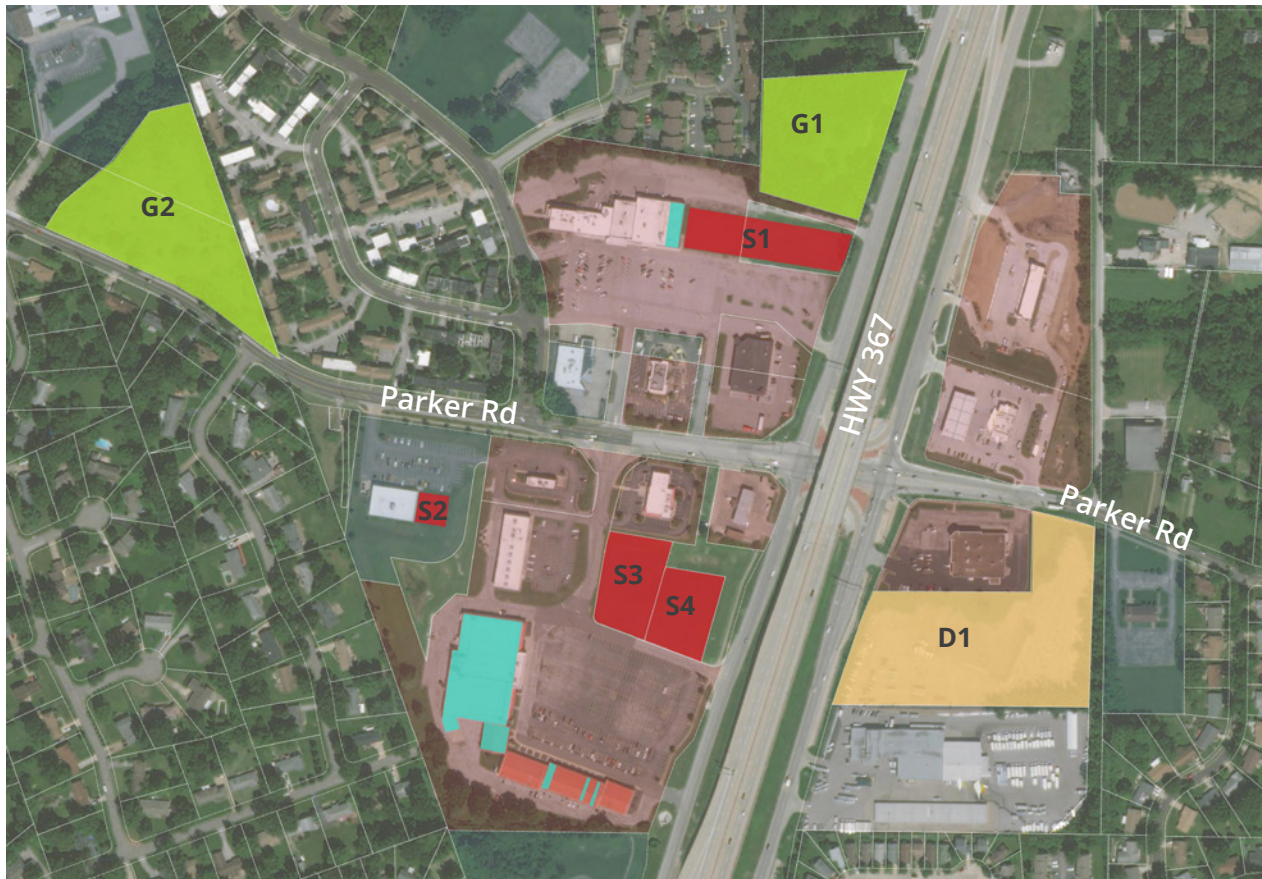
S1: 1.1 acre
S2: 0.2 acre
S3: 1.0 acre
S4: 0.8 acre

G1: 2.8 acre
G2: 3.9 acre

Demolition or Rehabilitation

D1: 5.3 acre

Total Acreage: 15.1 acres



Accounting, Tax Preparation, and Bookkeeping
Jackson Hewitt

Auto
Carwash

Beauty
Hair Salon
Kings's Beauty
May's Nails

Check Cashing/Loans
Check 'n Go

Gas Stations
Quicktrip
Gas Station

Financial
Bank of America

General Merchandise
Dollar General
Family Dollar

Health Care
Advance Surgical Care
Fresenius Medical Care
VA Outpatient Clinic
Washington University
Dialysis

Health Retail
CVS Pharmacy
Walgreens

Restaurants
Casual
Imo's Pizza
Moma Elayne's Kitchen
Rookies Bar & Grill

Fast Food
China King
China Wok
St. Louis Fish and Chicken
McDonalds
Subway
Taco Bell

Storage/Moving
UHaul

Wireless Communications
Phone Stop

B. HWY 367 & REDMAN ROAD: OPPORTUNITY AREAS

■ Available Building Space
 ■ Site Ready
 ■ Greenfields

G1: 2.5 acre

■ Demolition or Rehabilitation

D1: 2.7 acre

D2: 0.7 acre

D3: 0.6 acre

D4: 0.9 acre

D5: 1.6 acre

D6: 0.7 acre

D7: 1.9 acre

Total Acreage: 11.6 acres

Auto

Auto Sales 1

Auto Maintenance 1

Auto Maintenance 2

Beauty

Nail Salon

Daycare

Daycare 1

Daycare 2

Office

Office 1

Office 2

Misc Retail

Bait and Tackle

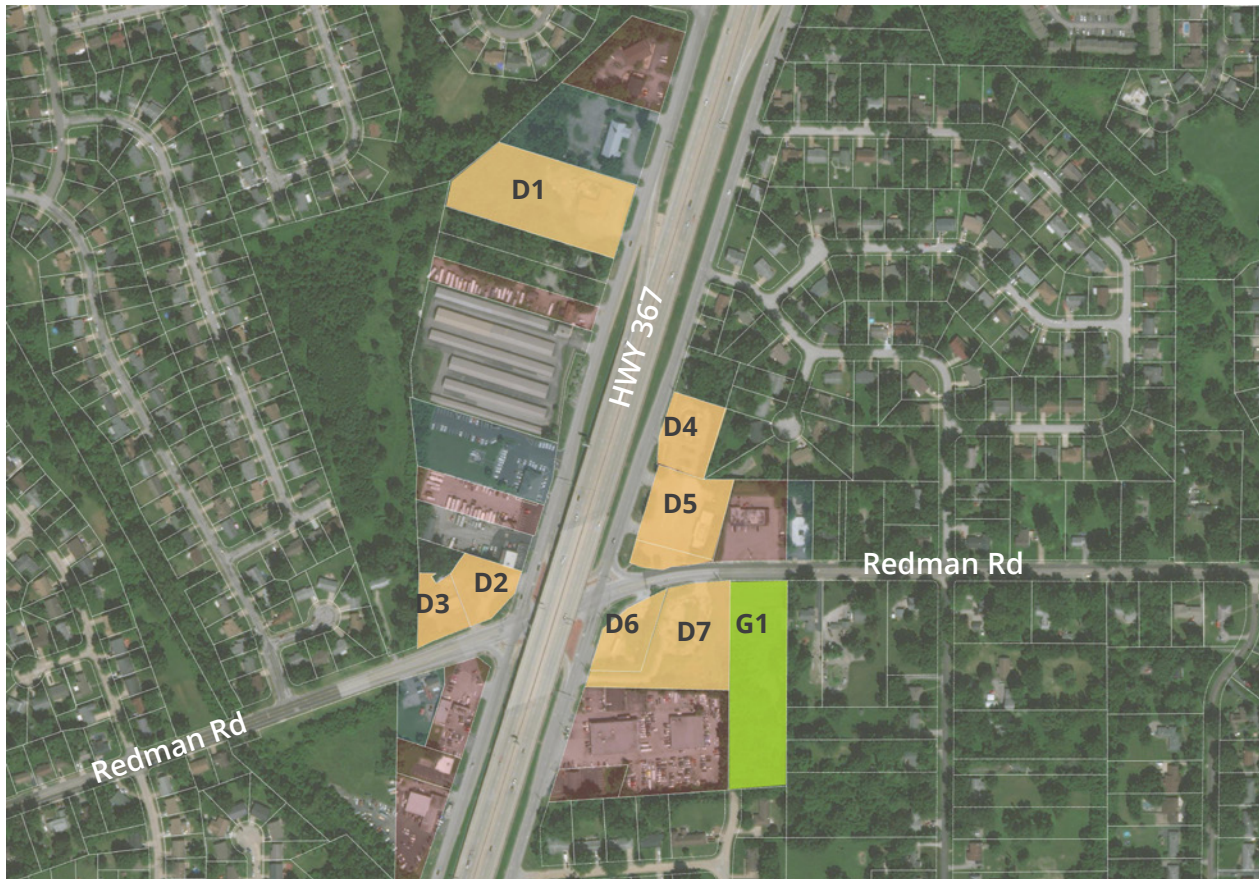
Storage/Moving

Storage Units

RV Storage

Other

St. Louis County Police



C. LINDBERGH BLVD & OLD HALLS FERRY : OPPORTUNITY AREAS

Available Building Space Site Ready Greenfields

G1: 1.4 acre

Demolition or Rehabilitation

D1: 2.7 acre

Total Acreage: 4.1 acres



Civic

St. Louis County Library
(Jamestown Bluff
Branch)

Auto

CarX

Beauty

Barber

Daycare

Kids Zone

Financial

First Bank

Gas Stations

BP
Mobile on the Run

Office

Office 1
(home health care)
Office 2 (accounting)
Office 3 (accounting,
insurance, home health
care, other)

Misc Retail

Dog Grooming and
Training

Healthcare

Dentistry 1
Dentistry 2
Dentistry 3
Orthodontics

Restaurants

Casual
Kitty's Corner

D. PARKER RD & OLD JAMESTOWN RD : OPPORTUNITY AREAS

■ Available Building Space ■ Site Ready ■ Greenfields

G1: 1.0 acre
G2: 0.6 acre
G3: 0.5 acre

■ Demolition or Rehabilitation

D1: 1.0 acre
D2: 0.3 acre

Total Acreage: 3.4 acres



Civic
Black Jack City Hall
Fire Station

Auto
Transmission Repair

Beauty
Barber 1
Barber 2
Nails
Salon

Contractors
Electrical and Home
Repair

Daycare
Daycare 1

General Merchandise
Family Dollar

Office
Office 1
Office 2
Office 3
Office 4
Home Health Care

Misc Retail
Cleaners 1
Cleaner 2
Florist
Lawn Mower Shop
Liquor Store

Health Retail
Walgreens

Restaurants
Fast Food
Dominoes

Casual
Meyer's Country
Cottage
Pizzeria

Other
Dance Studio

E. LINDBERGH BLVD & NEW HALLS FERRY RD: OPPORTUNITY AREAS

■ Available Building Space ■ Site Ready ■ Greenfields

Large-Medium Box

B1: 117,000 SF

B2: 30,000 SF

Small

B3: 2,280 SF

B4: 900 SF

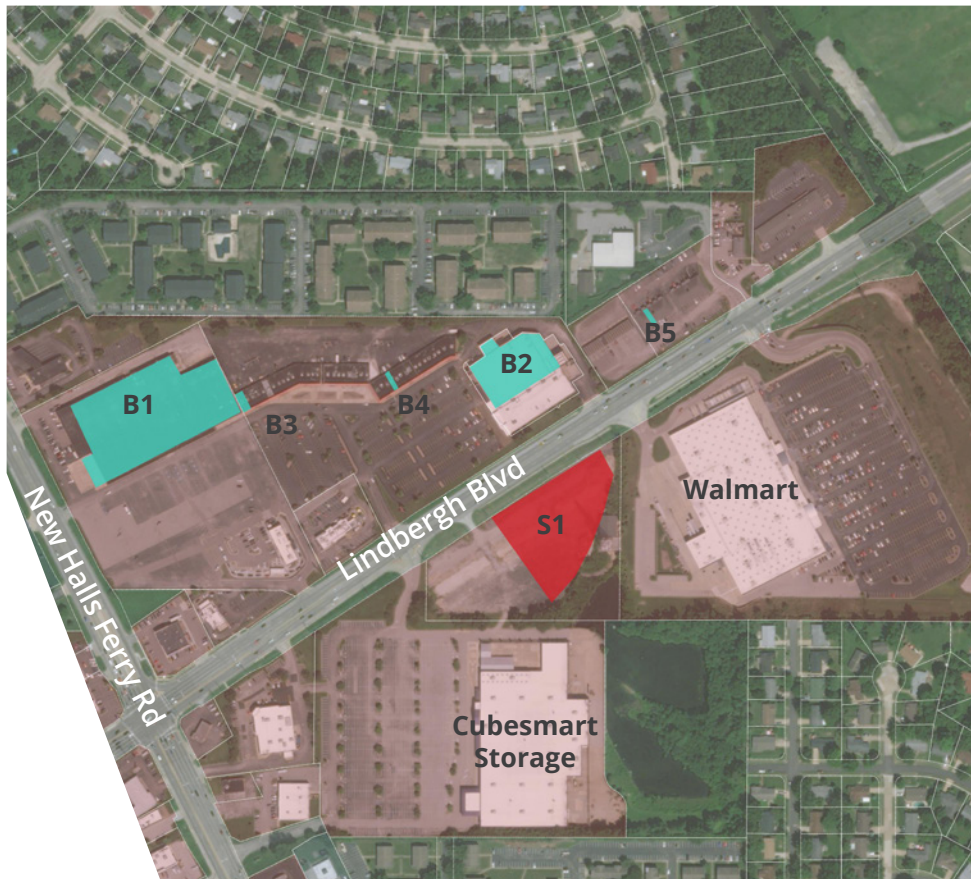
B5: 1,000 SF

S1: 2 acres
(approx, site still
under development)

■ Demolition or Rehabilitation

Total Building Space: 151,180 SF

Total Acreage: 2 acres



Check Cashing/Loans
LoanMaster

DayCare
Mary Margaret Daycare
& Learning Center

Financial
Bank of America
FCB Bank

Fitness
Planet Fitness
SDO Fitness

General Merchandise
Dollar Tree
Walmart Supercenter

Health Care
Urgent Care

Health Retail
Walgreens

Misc Retail
A&C Wine and Spirits
CBD Kratom
The Cave Anime Outlet &
Smoke Shop
Cross Keys Vacuum
Design It
Leidos Cleaners

Office
Event Visions
State Farm
Edward Jones
Eagle Group Realtors
Healthcare Solutions
People Ready
Regional Finance

Pets
Pet Planet (grooming)

Restaurants
Casual
Cecil Whittaker's Pizza

Catering
One Dish Wonders

Coffee/Cafe
Creations Smoothie

Fast Food
Burger King
Chik-fil-A
McDonalds
ModPizza
New York Grill
Old St. Louis Chop
Suey

Storage/Moving
Cubesmart Storage

Auto
AutoZone
Club Car Wash
Discount Tire
Imported Car Repair
The Pit Crew
Take 5 Oil Change
Self Service Car Wash

Bakery
LaPatisserie

Beauty
Angie's Pro Nails
Barber Beauty
Favour Barbor
Maxi Beauty
Mean Streak Hair
Salon
Sid's Eyebrow
Threading
Studio Cutz Salon
Studio 6 Salon
VCLABEL Beauty Bar
Waxtician Studios