67

ALDI trade zones profiled across 8 Sun Belt states.

ALDI announced 180 new stores across 31 states. What does their trade zone actually look like? I pulled the data to find out.

22	8 states	GrowthFactor
Variables evaluated	Sun Belt coverage	Data source

*This analysis profiles ALDI's portfolio using store addresses and GrowthFactor's demographic engine. For clients, we pair this with your revenue data to identify which variables actually predict performance. Learn more about Discovery →

METHODOLOGY

01 **Pulled 67 existing ALDI store addresses** from their public store locator across 8 Sun Belt states (TX, FL, GA, NC, SC, TN, AZ, NV). These states most closely resemble ALDI's active expansion markets.

02 **Pulled 16-minute drive time demographics** for each via GrowthFactor. Esri 2025 data, 22 variables per trade zone.

03 **Ran CV[1] analysis:** standard deviation ÷ mean across all 67 zones. A tight CV means that variable is consistent across ALDI locations. A wide CV means it varies widely, suggesting ALDI doesn't filter for it.

WHY 67, NOT ALL 2,677?

Demographics come from drive time areas, not zip codes, so each store requires an individual API call. I focused on the states where ALDI is actively expanding and where the market profile most resembles Phoenix. A full 2,677-store analysis would take the same approach at scale.

FIG 1: VARIABLE CONSISTENCY ACROSS 67 ALDI TRADE ZONES

VARIABLE	MEDIAN	IQR[2]	CV[1]
Avg Household Size	2.6	2.4 – 2.8	12.2%
% Retail Trade (share of jobs)	12.2%	11.0 – 13.1%	14.2%
Median Age	37.6	35.6 – 40.4	17.0%
% Healthcare (share of jobs)	12.7%	11.1 – 14.0%	18.3%
Median HH Income	$79K	$66K – $97K	23.3%

What doesn't matter: race/ethnicity (70% CV[1]), population size (68% CV), growth rate (73% CV). **ALDI goes wherever the household profile fits,** not where the city is growing fastest or who lives there.

Translation: ALDI targets working families. Households of 2–3 people, mid-30s to early 40s, earning $66–97K, in suburban areas with heavy retail traffic. Not a poverty play. **A working-family play.**

FIG 2: NEW PHOENIX SITES VS. ALDI BASELINE

SITE	SF	LEASE	HH SIZE	MED AGE	RETAIL %	INCOME	FIT
ALDI BASELINE IQR[2]	–	–	2.4 – 2.8	35.6 – 40.4	11.0 – 13.1%	$66K – $97K	–
Mesa (Gilbert Rd)	25K	10 yr	3.0	37.8	11.2%	$96K	4/4
Mesa (Power & Elliot)	19K	Own	3.0	38.0	11.6%	$100K	4/4
Peoria (Peoria Ave)	26K	10 yr	3.0	36.8	12.7%	$84K	4/4
Cave Creek (Carefree Hwy)	19K	**20 yr**	3.0	**50.8**	11.6%	**$157K**	2/4

Values in red fall outside ALDI baseline IQR[2] · Drive times vary by site density; baseline used 16-min for suburban locations

YOUR FINGERPRINT ≠ YOUR FILTER

ALDI's most consistent variable is **household size** (12.2% CV). Every store looks the same on this metric. You'd assume it's the one that matters most. But it's useless for screening sites. Cave Creek has a household size of 2.4, perfectly in range, and it's the outlier.

The variable that actually separates good sites from bad ones is **income**. But income has a *higher* CV (23.3%) because ALDI accepts a wider range of it. It's less consistent across their portfolio, yet it's more predictive of fit.

FINGERPRINT

Household Size

What ALDI looks like. Consistent across all 67 stores. But doesn't screen out bad sites — Cave Creek passes.

FILTER

Income

What separates fits from outliers. Less consistent, more predictive. Cave Creek fails here ($157K vs $66–97K).

Most retailers evaluate new sites against their fingerprint: **"does this look like our other locations?"** But looking like your portfolio and performing like your portfolio are two different tests. If you're only running one, you could be approving sites that look right and fail, or passing on sites that look wrong and would have worked.

The caveat: I can identify which variable separates demographic fits from outliers. I can't tell you which ALDI stores actually sell the most without their revenue data. My guess: the locations that hit the fingerprint *and* sit at the higher end of income ($80–100K) are probably their best performers. Affluent families choosing ALDI for quality, not just price. But that's a hypothesis, not a finding.

To turn it into a finding, you'd pair demographics with actual store-level performance data. That's what GrowthFactor Discovery does: a 30-day EDA that maps your revenue by location against demographics, geography, and competitive landscape to find the variables that actually separate your top stores from your bottom stores.

[1] CV = Coefficient of Variation (std dev ÷ mean). Lower = more consistent across the portfolio. [2] IQR = Interquartile Range (25th–75th percentile). The "typical" ALDI trade zone range.