



EMEA RETAIL

Shopping all over the world

With over 230 retail specialists across 31 EMEA countries, Colliers International works with clients to realise opportunities in both mature and emerging markets. Our proven track record of dealmaking is underpinned by expert consultancy, dedicated research analysis and a deep understanding of retailing.

Cross-border expertise enables us to advise with expertise and imagination. We're able to think like occupiers and our ability to understand the end-user and what is commercially important to them, means our teams are market leaders across the EMEA region.

We hope you find this brief guide to our service, work and key contacts useful. Whatever your EMEA location or wherever you would like to do business, our retail experts would be pleased to discuss the exciting opportunities that today's market offers.



A handwritten signature in black ink, appearing to read 'Paul Souber'.

PAUL SOUBER

Head of Central London & Co-Head EMEA Retail Agency
+44 20 7344 6870 | paul.souber@colliers.com

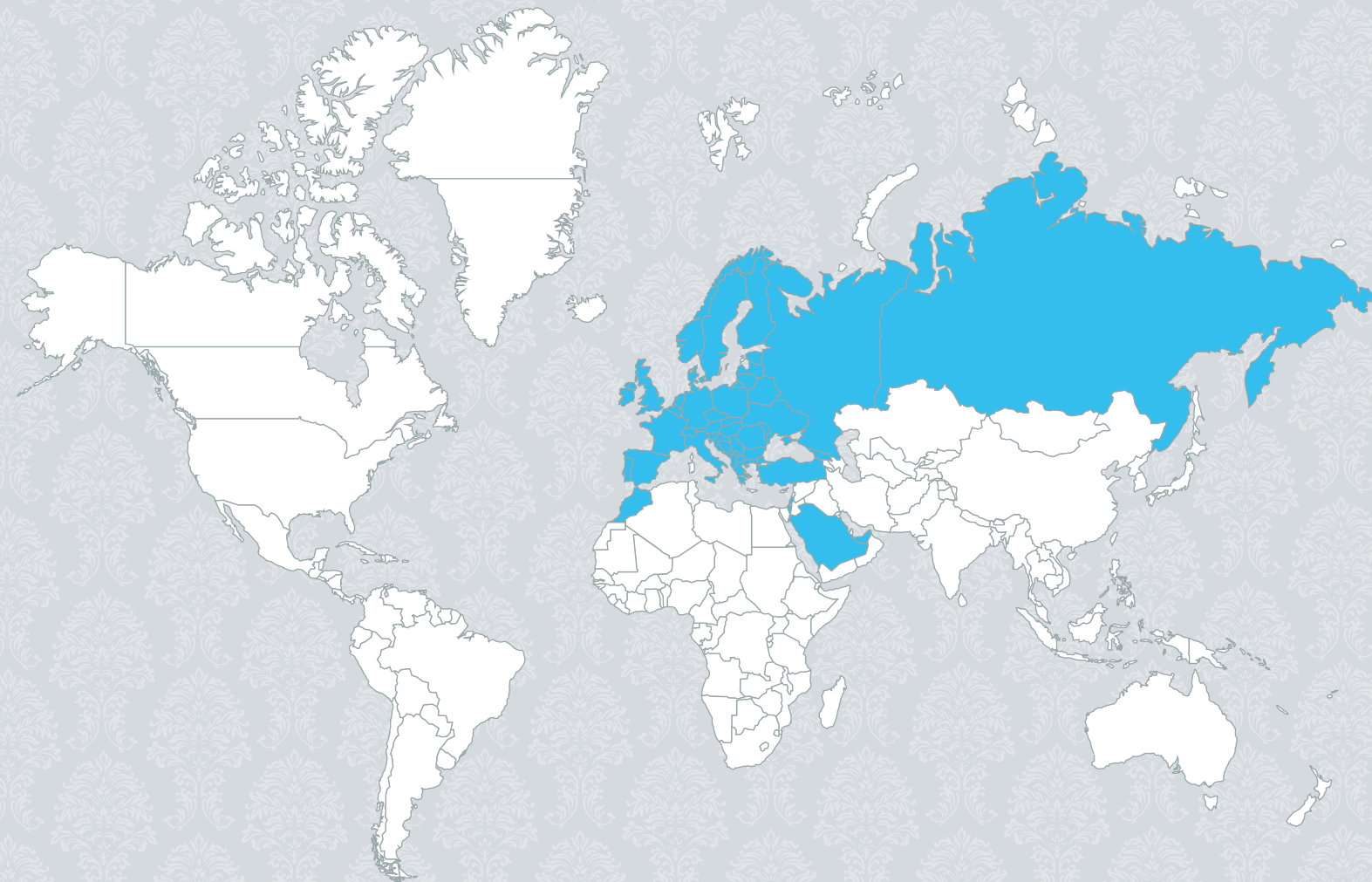


A handwritten signature in black ink, appearing to read 'Etienne Van Unen'.

ETIENNE VAN UNEN

Partner | Director Retail | Co-Head EMEA Retail
+31 20 540 55 63 | etienne.vanunen@colliers.com

Our Coverage: EMEA.



Our Core Team.



PAUL SOUBER
Director | EMEA Co-Head
Retail Agency



ETIENNE VAN UNEN
Partner | Director Retail | Co-Head
EMEA Retail



ANNA NIKANDROVA
Partner
Moscow



HAAKON REED-LARSEN
Head of Retail
Oslo



MARTA MACHUS-BUREK
Partner | Director | Retail Agency
Warsaw



ANTHONY CROW
Retail Consultant
Vienna



BOSKO TRIFUNOVIC
Associate Director
Stuttgart





















STUART GISSING
Regional Director
Middle East



HELLE ANDERSEN
Consultant
Copenhagen

Our Clients: Owners.

Our Clients: Brands.

United Kingdom.



**GROSVENOR
ESTATE**
LONDON UK

GLA
300 acres

KEY TENANTS
Celine
Balenciaga
Christopher Kane
Goyard
Roksanda



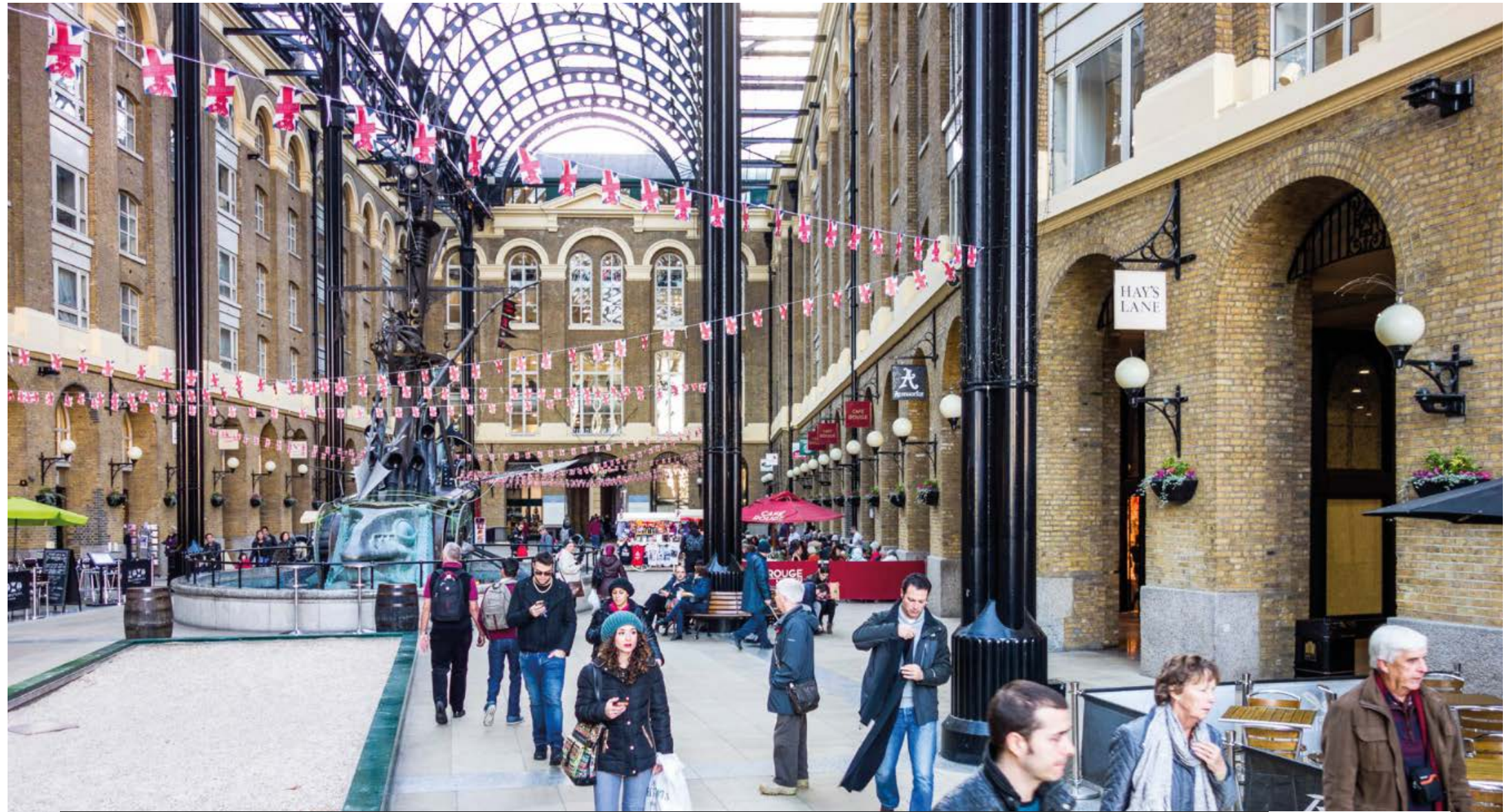


CARNABY
LONDON UK

GLA
26,000 m²

KEY TENANTS
MAC
The Kooples
Addidas Originals
Size
Descente

CARNABY



**MORE LONDON
& LONDON BRIDGE CITY**
LONDON UK

GLA
14,000 m²

KEY TENANTS
Next
Boots
Gaucho
Côte
Marks and Spencer

LONDON BRIDGE CITY



**ST JAMES'S
MARKET**
LONDON UK

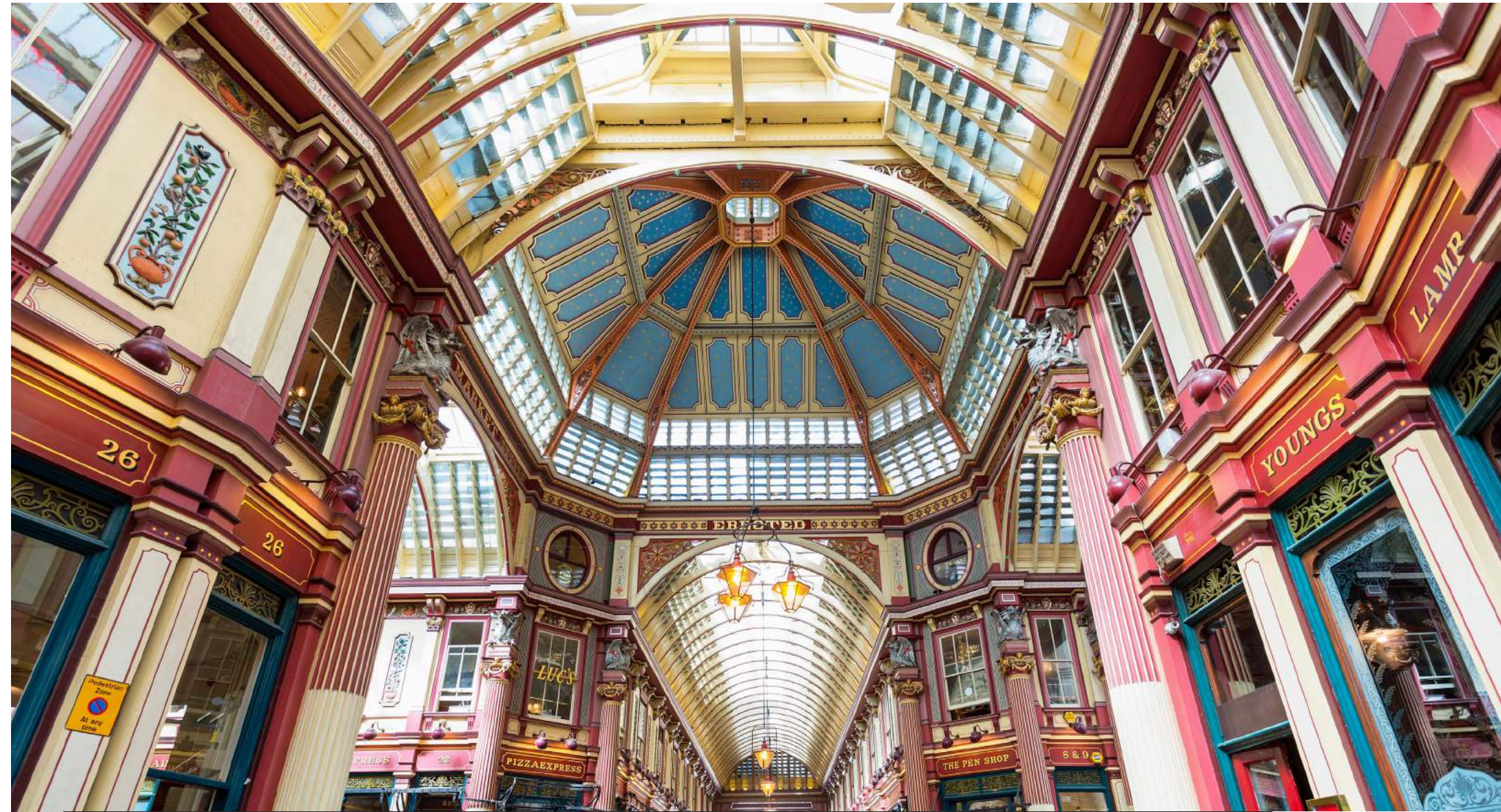
GLA
A3: 2,051 m²

OPENED
Q3 2016

KEY TENANTS
Aquavit
Ole and Steen
Anzu
Venetia



ST JAMES'S
MARKET



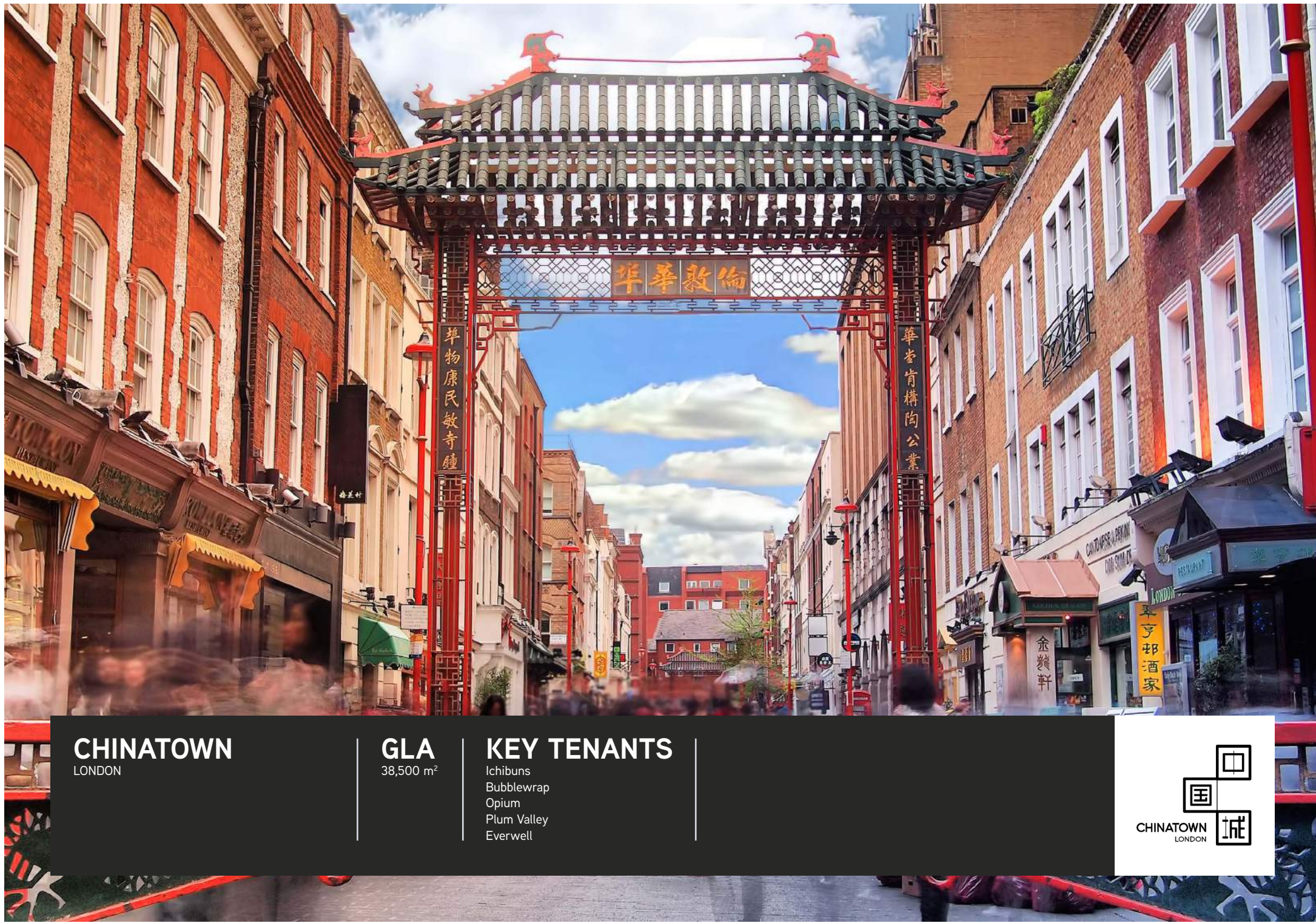
**LEADENHALL
MARKET**
LONDON

GLA
7,400 m²

KEY TENANTS
Barbour
Reiss
Oliver Sweeney
Youngs
Pizza Express



CITY
OF
LONDON



CHINATOWN
LONDON

GLA
38,500 m²

KEY TENANTS
Ichibuns
Bubblewrap
Opium
Plum Valley
Everwell



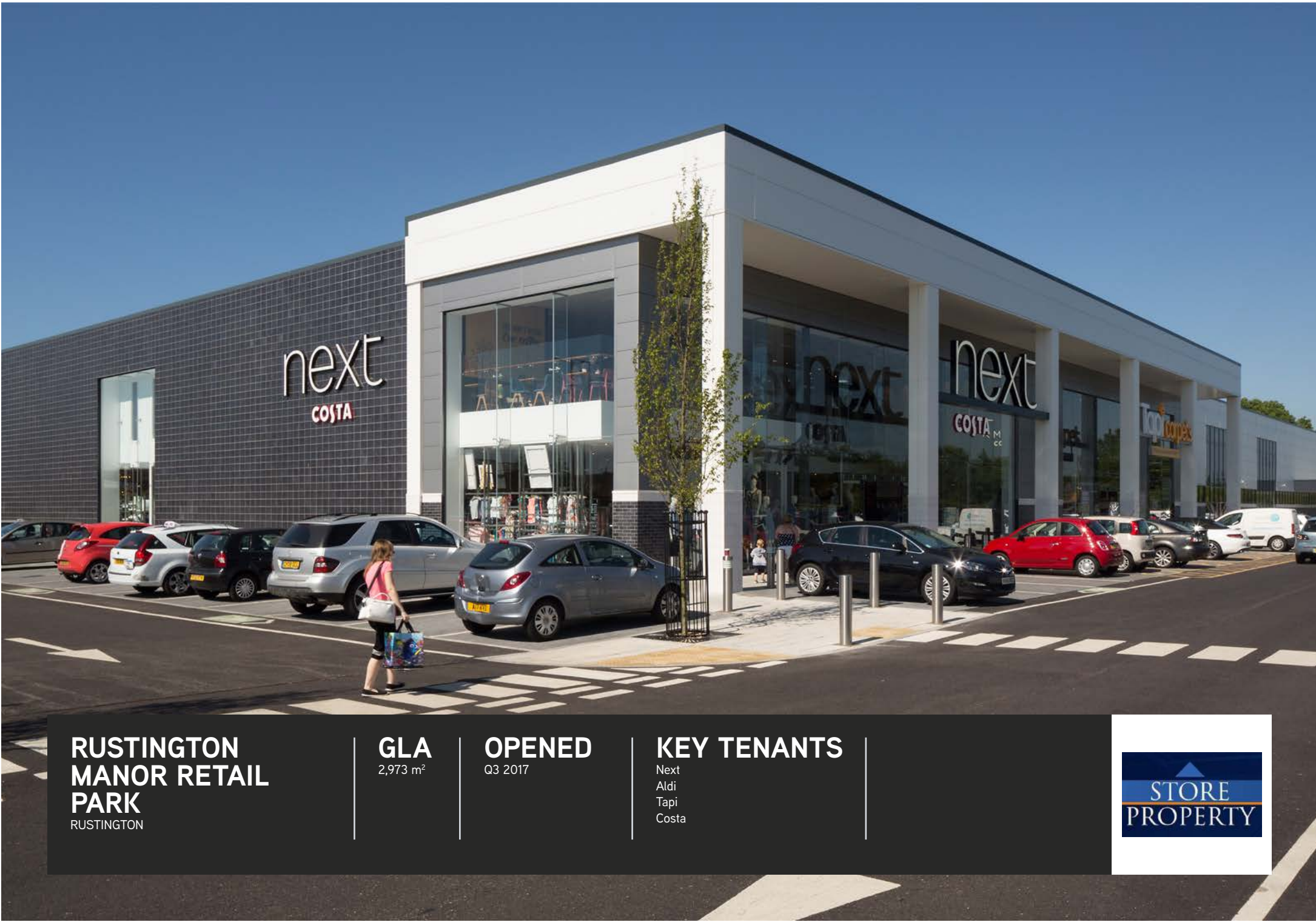
**SCOTCH
CORNER
DESIGNER
VILLAGE**
GATEWAY TO THE NORTH

GLA
23,225 m²

**OPENING
DATE**
Q3 2019

KEY TENANTS
Pending negotiations



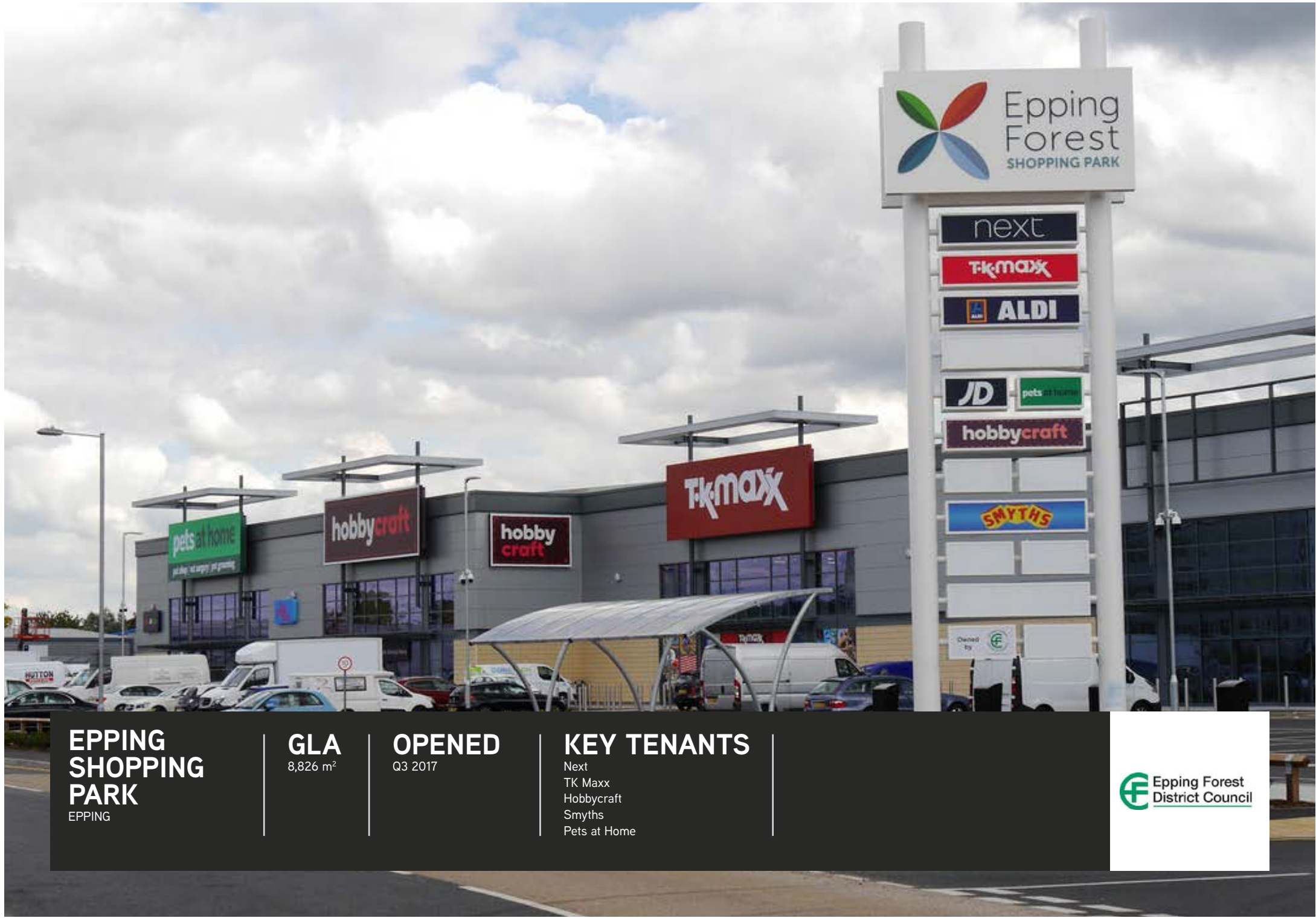


**RUSTINGTON
MANOR RETAIL
PARK**
RUSTINGTON

GLA
2,973 m²

OPENED
Q3 2017

KEY TENANTS
Next
Aldi
Tapi
Costa



**EPPING
SHOPPING
PARK**
EPPING

GLA
8,826 m²

OPENED
Q3 2017

KEY TENANTS
Next
TK Maxx
Hobbycraft
Smyths
Pets at Home



Netherlands.





SHOPPING CENTRE DE TUINEN

NAALDWIJK

GLA
15,000 m²

KEY TENANTS

H&M
Esprit
Gerry Weber
Holland & Barrett
Hunkemöller



MAGNA PLAZA

AMSTERDAM

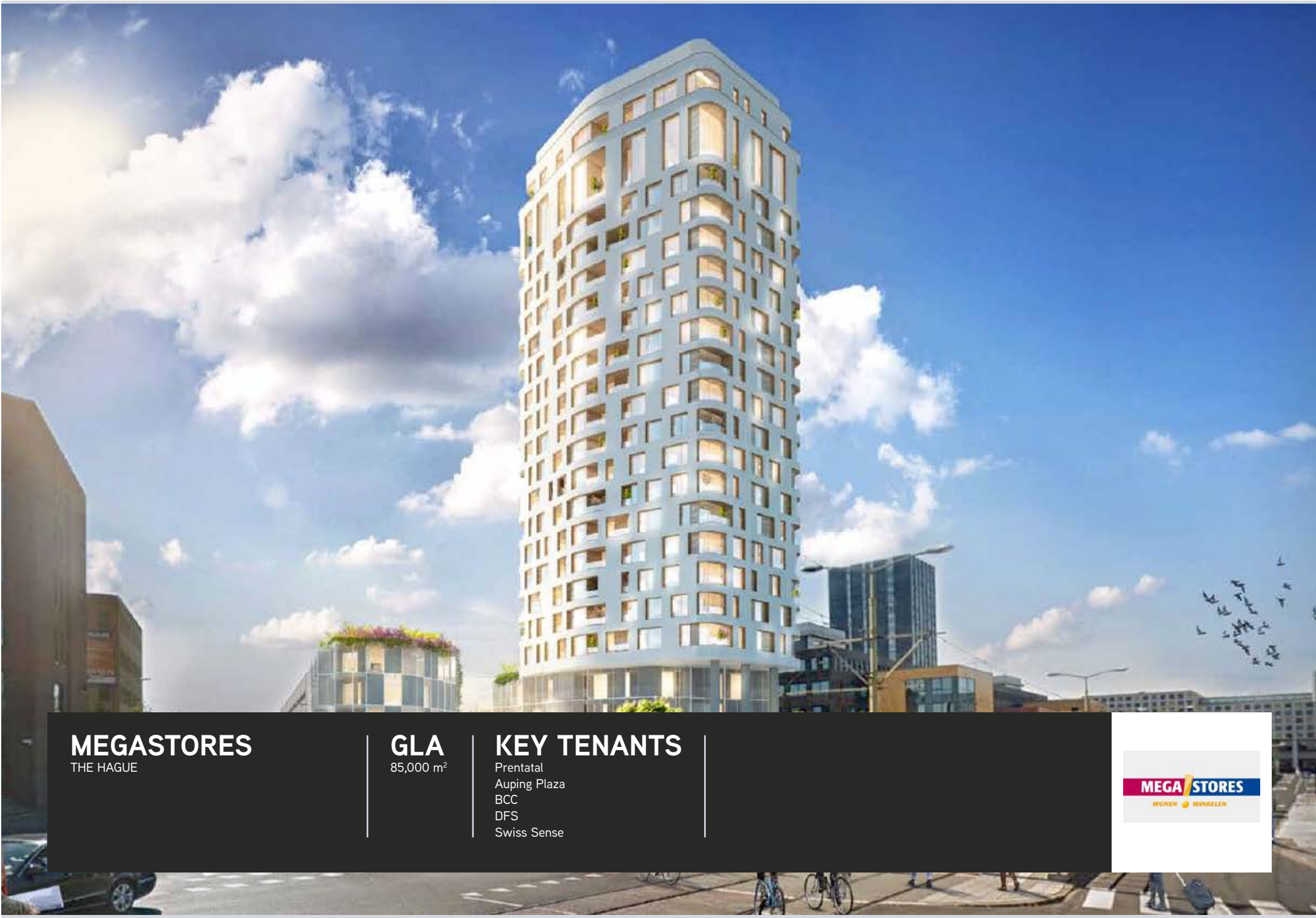
GLA
6,000 m²

**OPENING
DATE**
Q4 2018

KEY TENANTS

Suitsupply
Mango
Lacoste
Sissy Boy





MEGASTORES
THE HAGUE

GLA
85,000 m²

KEY TENANTS
Prenatal
Auping Plaza
BCC
DFS
Swiss Sense



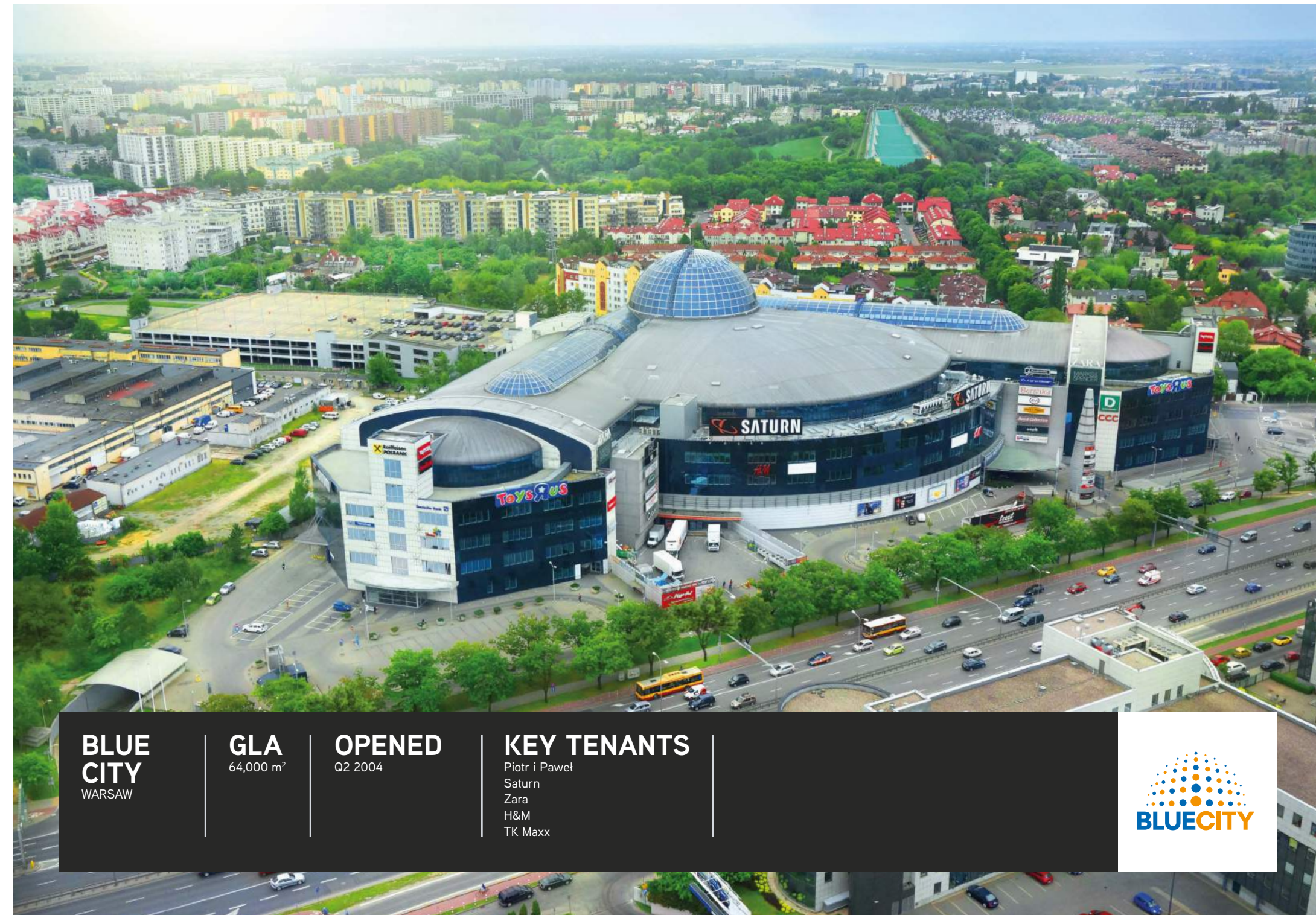
DE KLANDERIJ
ENSCHEDÉ

GLA
30,000 m²

KEY TENANTS
America Today
The Bodyshop
Flying Tiger
Foot Locker
Gerry Weber



Poland.



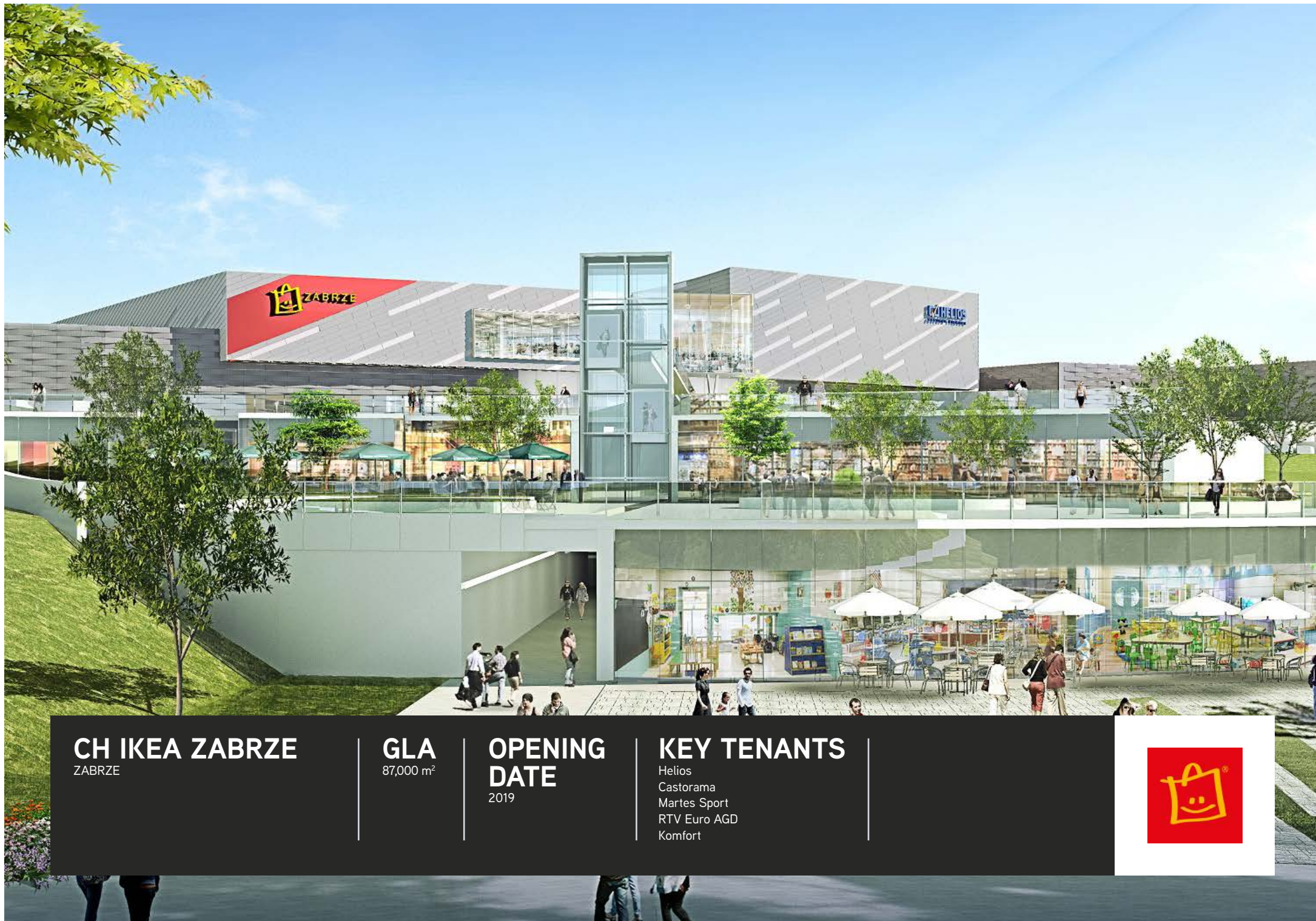
**BLUE
CITY**
WARSAW

GLA
64,000 m²

OPENED
Q2 2004

KEY TENANTS
Piotr i Paweł
Saturn
Zara
H&M
TK Maxx





CH IKEA ZABRZE
ZABRZE

GLA
87,000 m²

**OPENING
DATE**
2019

KEY TENANTS
Helios
Castorama
Martes Sport
RTV Euro AGD
Komfort



**GALERIA
OLIMP**
LUBLIN

GLA
60,000 m²

OPENED
Q4 2000

KEY TENANTS
Leroy Merlin
Carrefour Market
Toys'R'Us
Media Expert
Empik, Reserved

**GALERIA
OLIMP**



PLAC UNII CITY SHOPPING
WARSAW

GLA
15,500 m²

OPENED
Q4 2013

KEY TENANTS
Supersam
H&M
Cubus
Zara
Smyk

Plac Unii
CITY SHOPPING



ZIELONY TARGÓWEK RETAIL PARK
WARSAW

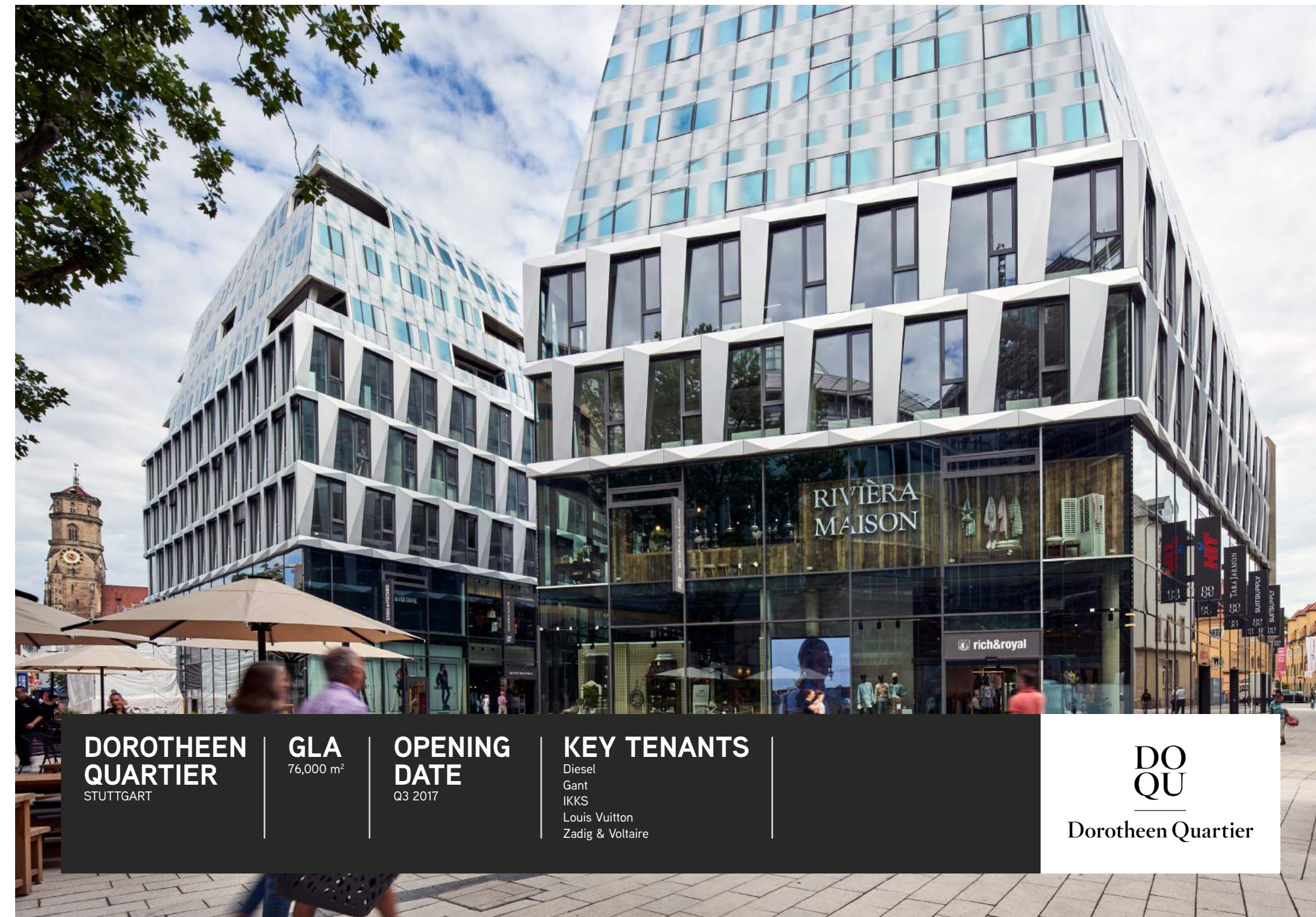
GLA
25,000 m²

OPENED
Q2 2007

KEY TENANTS
Saturn
Black Red White
Komfort
Abra
Jysk

zielony
Targówek

Germany.



**DOROTHEEN
QUARTIER**
STUTTGART

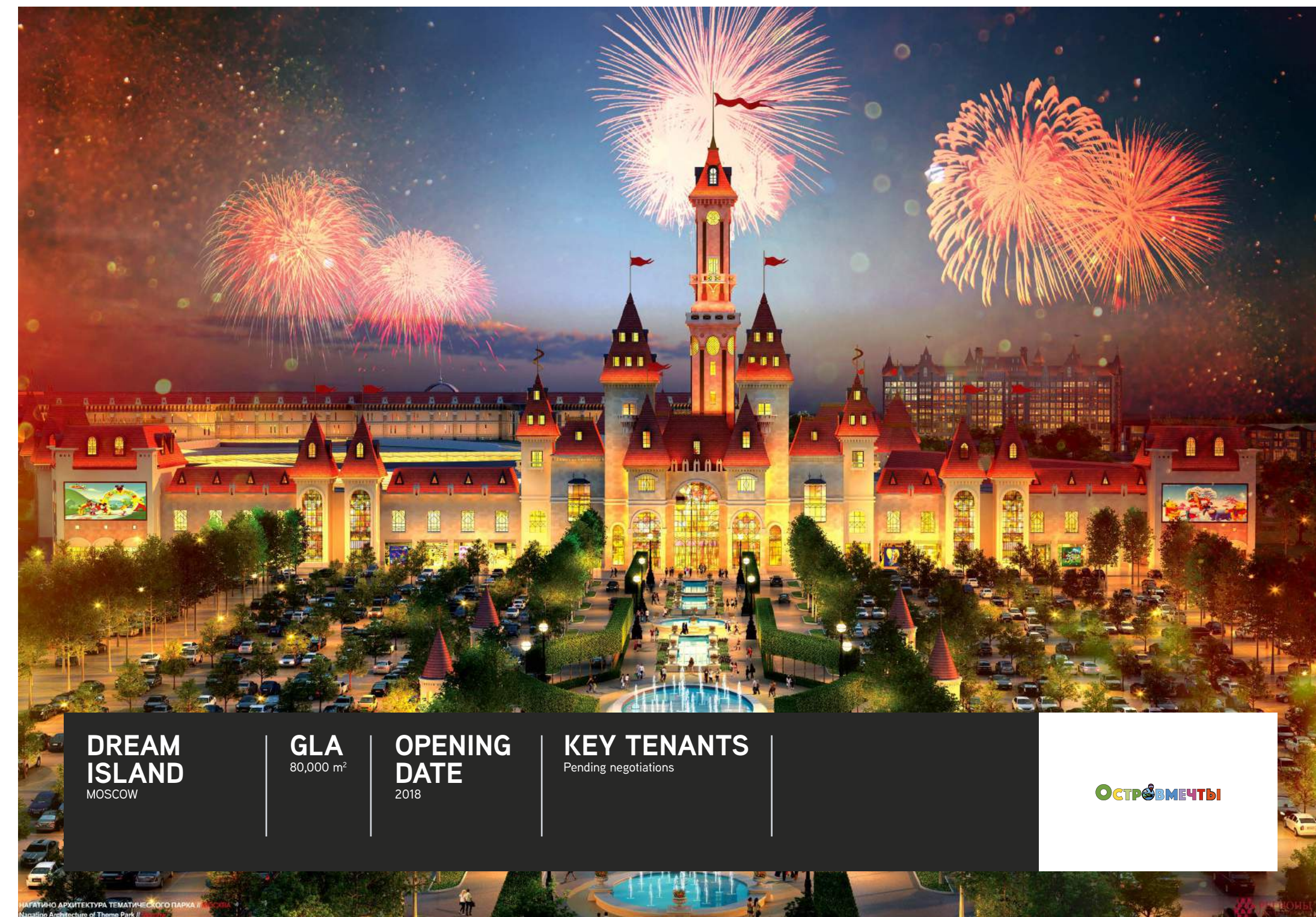
GLA
76,000 m²

**OPENING
DATE**
Q3 2017

KEY TENANTS
Diesel
Gant
IKKS
Louis Vuitton
Zadig & Voltaire

**DO
QU**
Dorotheen Quartier

Russia.





MOZAICA
MOSCOW

GLA
68,000 m²

OPENED
Q4 2014

KEY TENANTS

LENTA
H&M
LCWaikiki
Sportmaster
Kinomax IMAX



GROZNY MALL
GROZNY

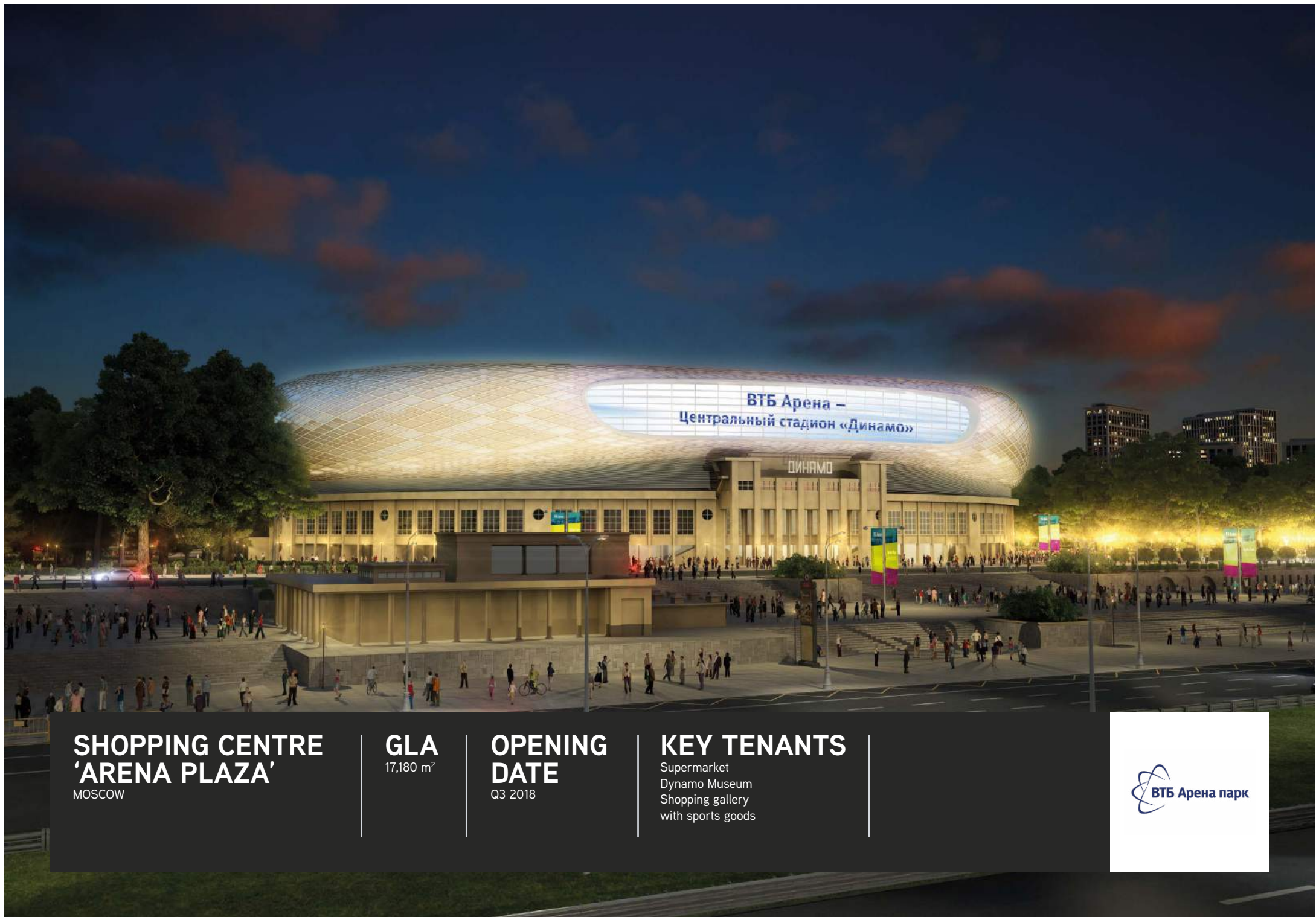
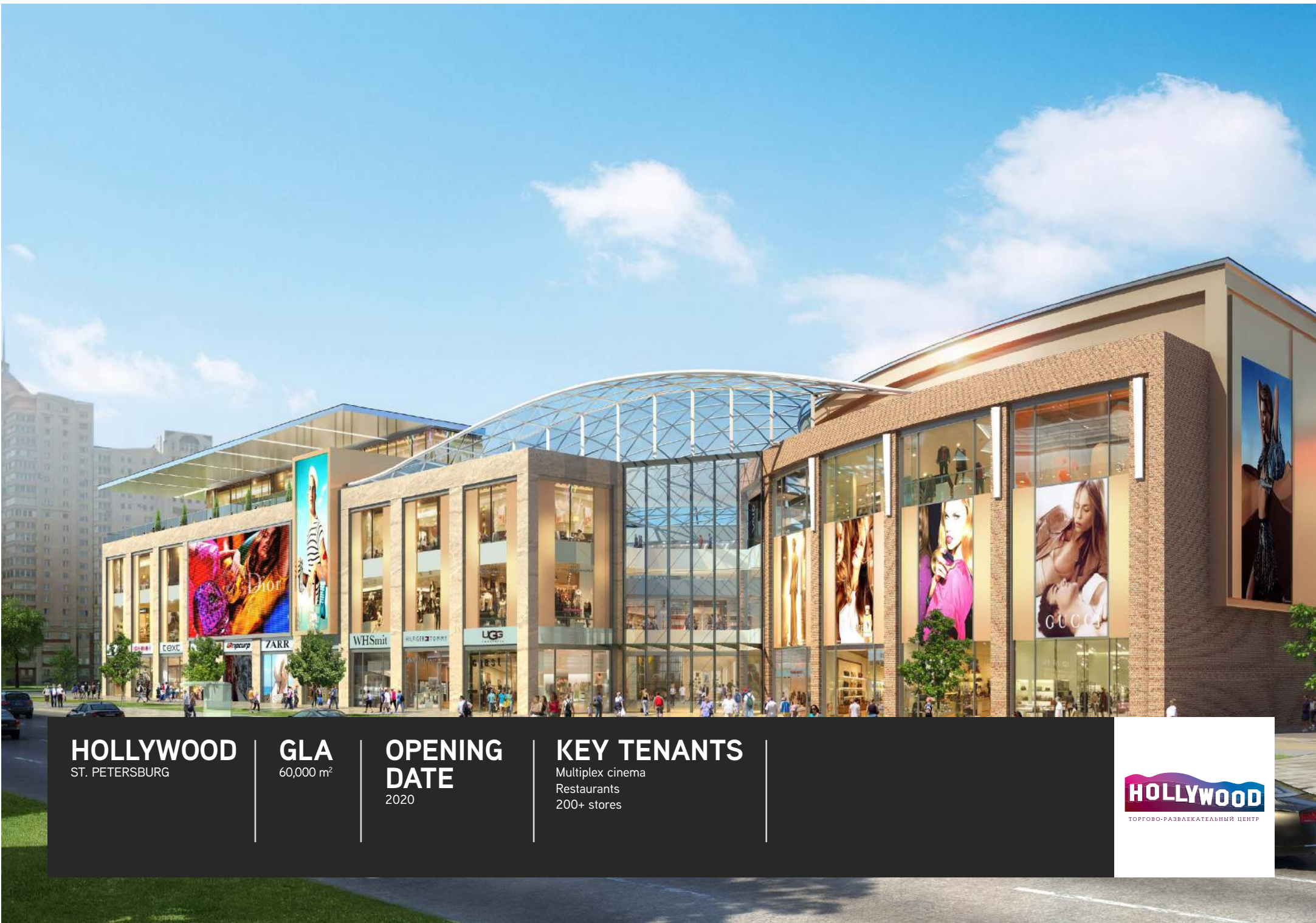
GLA
59,000 m²

OPENING DATE
Q4 2019

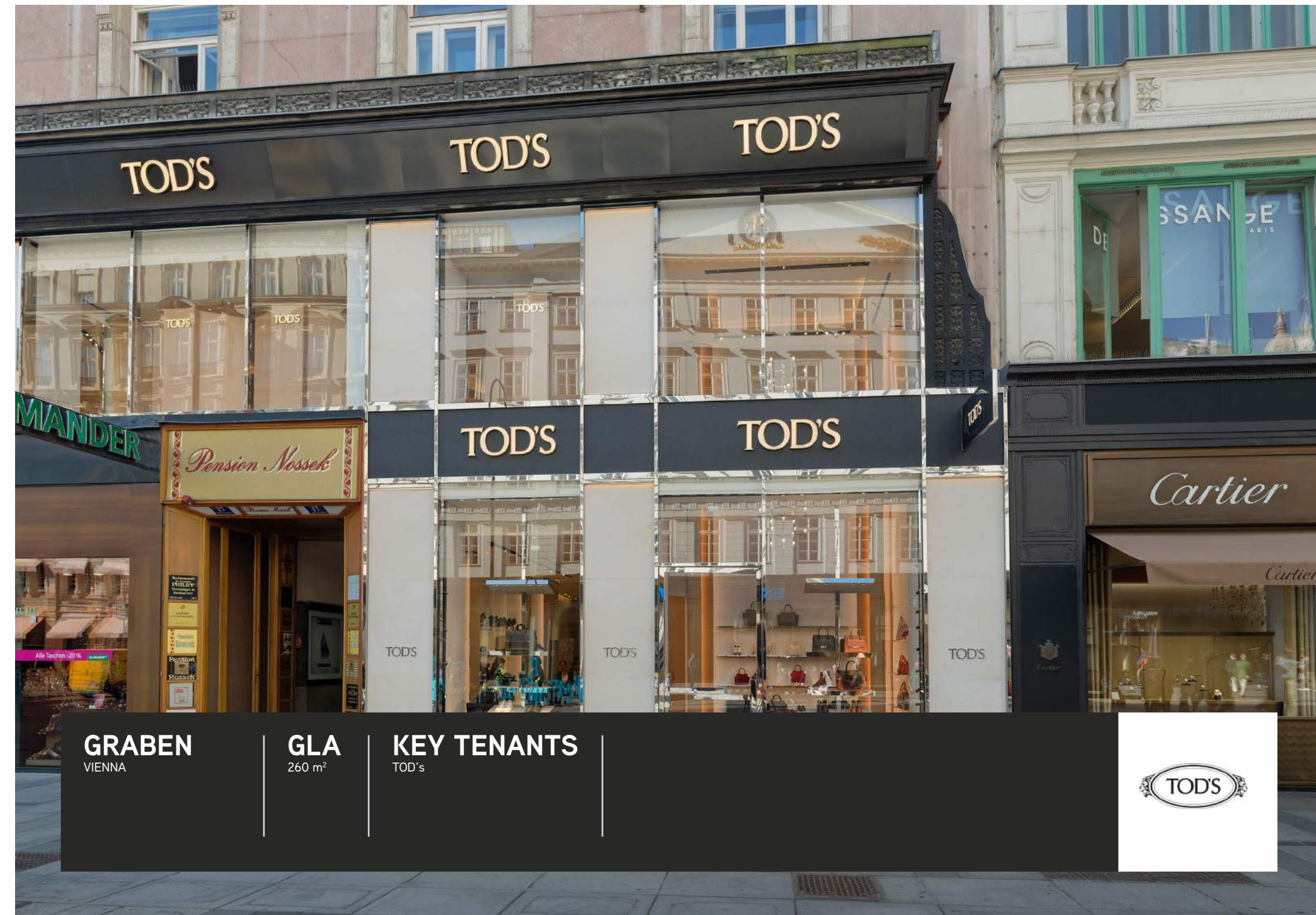
KEY TENANTS

Hypermarket
The largest gallery of shops,
restaurants and entertainment
zone in the North Caucasus Region





Austria.



Serbia.



**RAJICEVA
SHOPPING
CENTRE**
BELGRADE

GLA
15,500 m²

**OPENING
DATE**
Q3 2017

KEY TENANTS
Benetton
Delhaize
Fashion & Friends
Max Mara
Tommy Hilfiger

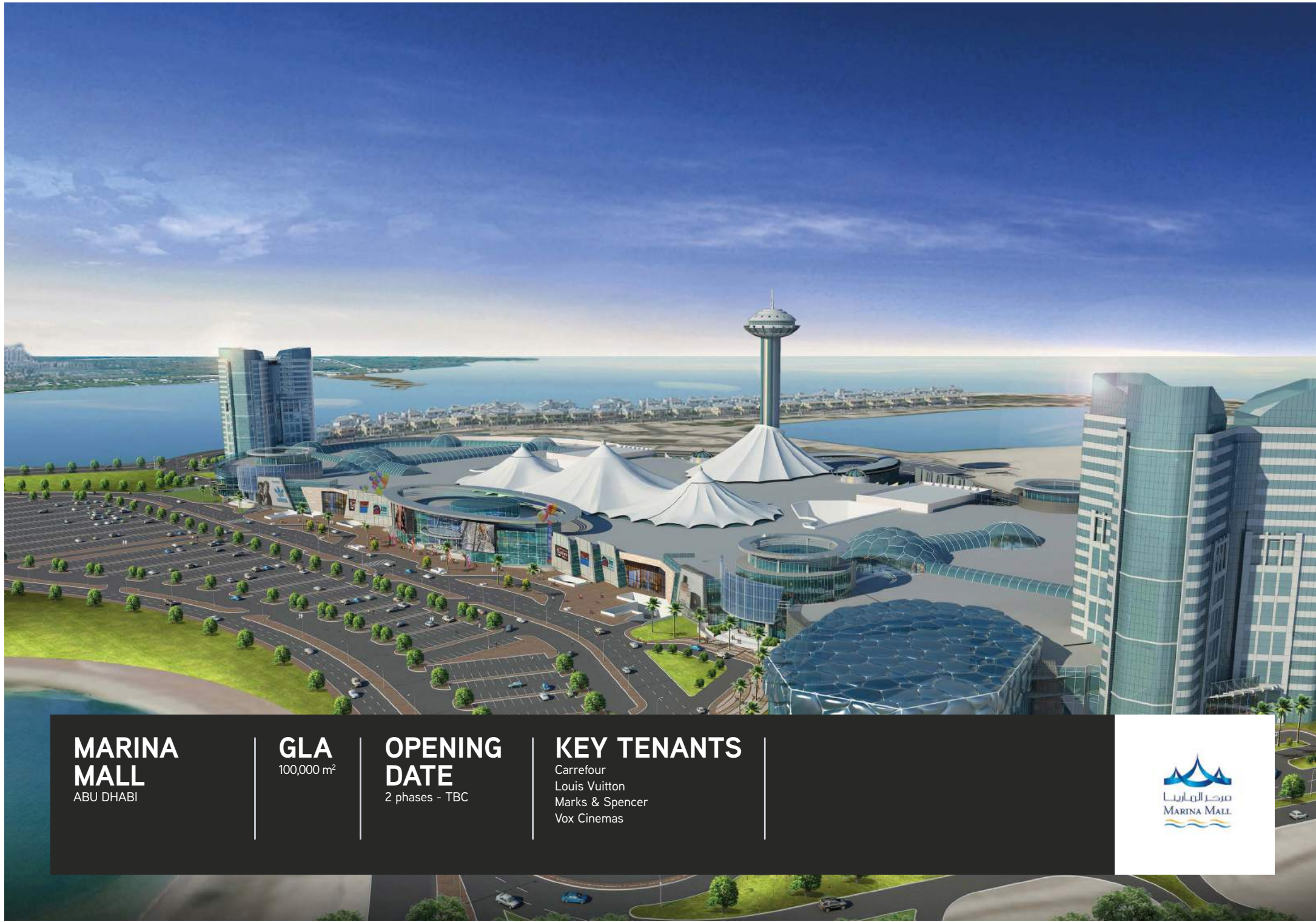


Slovakia.



Middle East.

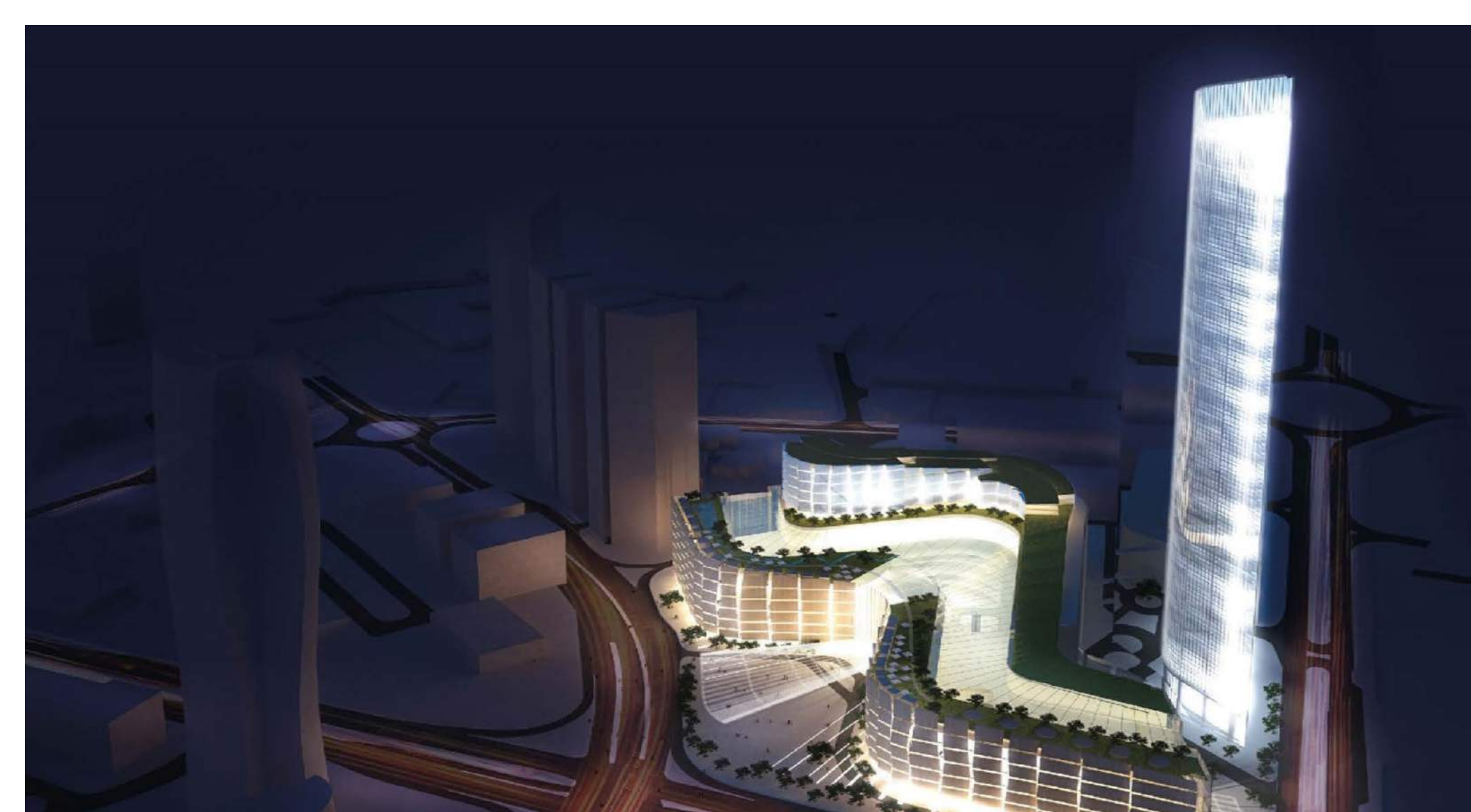




MARINA MALL ABU DHABI	GLA 100,000 m ²	OPENING DATE 2 phases - TBC	KEY TENANTS Carrefour Louis Vuitton Marks & Spencer Vox Cinemas	
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BOULEVARD MALL DOHA	GLA 62,000 m ²	OPENING DATE 2019	KEY TENANT Cinema Family entertainment Family dining options	BOULEVARD MALL LLC
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ASSIMA

KUWAIT CITY

GLA
72,000 m²

**OPENING
DATE**
2019

KEY TENANTS
Cinema
Hypermarket
Family entertainment
Department store



TILAL MALL

SHARJAH

GLA
94,000 m²

**OPENING
DATE**
2021

KEY TENANTS
Supermarket
Cinema
Family entertainment centre
Department store



EMEA Retail Success Stories.

MANGO

Mango is a Spanish retail chain that sells clothing and accessories targeted to women between the age of 18 and 35 years. Its philosophy is: Harmony, Modesty and Affection. Mango currently has 40 stores in the Netherlands.

MANGO'S NEEDS

A Mango franchisee wanted to open several new stores in the Netherlands. His goals is to own 15 stores. He also wanted to change the concept of the stores. He was looking for more fun and entertainment and needed our advice on how to create memorable experiences in his Mango stores.

OUR SOLUTION

In collaboration with the franchisee we developed a strategic plan. This plan outlined the sell off of smaller stores and a focus on stores of approximately 1,000 square meters with large open spaces to increase customers' shopping experience.

THE RESULT

We found five new Mango stores at popular shopping areas with favorable leasing conditions: in Hilversum, Breda, Alphen aan den Rijn, Spijkenisse and shopping center Gelderlandplein Amsterdam. All stores have the "wow" factor the owner was aiming for. We will continue our search for more stores that fit the new strategy.



ESPRIT

Esprit is an international fashion label which stands for style and quality since 1968 and was founded in San Francisco. Its collections are available in 40 countries worldwide in Esprit stores, franchise stores and department stores.

ESPRIT NEEDS

We worked closely together with a franchisee who is already an experienced fashion retailer. His goal was to open five Esprit stores in popular shopping areas or close to his other stores so his staff can work easily at multiple locations. He asked us to find locations that perfectly matched his strategy.

OUR SOLUTION

Firstly we advised him during contract negotiations of the franchise terms with Esprit. The next challenge was to find the right stores. We started our search in the cities where his other stores are located.

THE RESULT

The franchisee was able to agree on favorable franchise conditions. We found two new Esprit stores: one located at shopping center Gelderlandplein in Amsterdam and one in Alphen aan den Rijn. Both are close to his other stores. Currently we are searching for new Esprit locations in the Netherlands.





Ecco was founded in 1963 by the Danish Shoemaker Karl Toosbury and wife Birte. It has since grown to become a global brand with over 1,100 stores and 14,000 further sales locations, and the world's second largest manufacturer of casual footwear. Ecco is one of the few major shoe manufacturers in the world to own and manage every step of the shoemaking process, from tanneries to shoe.

ECCO NEEDS

Ecco is established in the UK and has made a decision to drive expansion and efficiency across the UK, and have one point of contact for all property matters to achieve this need.

OUR SOLUTION

We worked very closely with the Ecco team, providing detailed strategic advice on new target locations, in addition to existing store locations. The advice provided by our retail strategy team was presented together with detailed advice from our acquisition teams in each region of the UK which included providing a range of live opportunities together with a market commentary.

THE RESULT

We now have a dedicated Ecco team at Colliers providing advice on all property matters including new store acquisitions, lease advisory matters, and business rates advice and are fully committed to the new store acquisitions across the UK.



Sizeer is a modern European chain of more than 100 multi-brand stores with shoes, clothes and accessories. Sizeer offers the best world-wide known brands, Nike, Lacoste, Adidas, Converse, Puma, Timberland or Reebok, among others. The offer is constantly being expanded with new, extremely attractive brands for young people and the list of stores is growing steadily.

SIZEER NEEDS

Marketing Investment Group the owner of the Sizeer brand consistently implements the development strategy in Central and Eastern Europe. Colliers was asked to help expand the chain into the markets of Romania and 3 Baltic states – Lithuania, Latvia and Estonia.

OUR SOLUTION

We conducted the analysis of retail properties in Lithuania and Latvia corresponding to Sizeer's requirements, advised in the process of acquiring attractive locations and coordinated negotiations of commercial terms and lease agreements.

THE RESULT

Prior to the cooperation with Colliers, Sizeer had only 2 stores in Lithuania. Since working with us, Sizeer has opened 3 new stores in Panorama, Akropolis in Vilnius and Domina in Riga. We also relocated one store into larger premises (Akropolis in Klaipeda) and signed one more lease agreement outside of the capital city with the projected store opening in Q1 2018. Negotiations regarding other locations are in progress.





Max is not only Sweden's favorite hamburger restaurant chain, it is also one of the first. In 1968 the founders of Max, Curt Bergfors and Britta Andersson, opened their first restaurant in Gällivare, high up in the northern part of Sweden.

Their hamburgers became so popular that within 2 years they opened more restaurants. Soon Max was established in several other cities in Norrland (the northern part of Sweden).

MAX NEEDS

120 restaurants worldwide

Approx. 5,400 employees worldwide

Turnover of €220 million

Most profitable restaurant chain in Sweden outperforming both McDonald's and Burger King

Most satisfied customers in the business for 12 consecutive years

Most preferred hamburgers in Sweden

Top taste in test after test

OUR SOLUTION

Max Hamburger wants to open up to 60 new stores in Norway - mainly building their own store house with drive thru. Also very interested in expanding to other European countries.

"Our vision is to become the world's best fast food chain and thus we are seeking the world's best franchise partners."

THE RESULT

We have found 6 stand alones / drive thru



Flying Tiger Copenhagen is a Danish variety store or price point retailer chain. Its first store opened in Copenhagen in 1995. The chain now has over 800 stores (2017). Its largest markets are Denmark, the UK, Spain and Italy. Before June 2016, it operated as Tiger in most places, T•G•R in Sweden and Norway, and Flying Tiger in Japan, USA, Belgium and the Netherlands. The chain sells a variety of items, mostly accessories and toys. Flying Tiger currently have 42 stores in Norway

Flying Tiger entered the Norwegian market in 2012, requiring expansion advice and selected Colliers Retail team as their advisory partner. Our services includes search and acquisition of new stores nationwide in Norway. We also conduct lease negotiations, relocations and other relevant property matters for Flying Tiger in Norway.

As of today we have found 42 new stores across Norway, both on high street and in shopping centers, in popular shopping areas with favorable leasing conditions.

We will continue this success working with Flying Tiger in order to fulfill and secure their expansion plans for Norway opening a further 75 stores.



SMCP

SANDRO MAJE CLAUDIE PIERLOT

The SMCP-Group is a French accessible luxury brand that combines three distinctive fashion labels with Paris-designed and high quality DNA. The labels sandro, maje and CLAUDIE PIERLOT range from sleek, cool & chic to joie de vivre and rebel. SMCP was founded in 1984 and is available in 34 countries worldwide in a mix of stand-alone-stores, department stores and online.

SMCP NEEDS

SMCP asked us to support their worldwide strategy and drive the expansion of the international luxury fashion group with its diverse brands in Germany. The base was to find matching prime locations fast and goal-oriented.

OUR SOLUTION

After a personal workshop in Paris with SMCP to better understand the brand we provided detailed and profound insights into the German retail market. Within this we analysed the target groups and recommended suitable locations in major German cities for each individual label of the SMCP.

THE RESULT

We advised SMCP-Group on 5 attractive stores with 150 – 250 sqm in premium and exclusive locations in German top cities that individually match the unique labels. All shops have appealing store fronts and desirable locations in the city centres: maje in Cologne, Düsseldorf and Stuttgart, CLAUDIE PIERLOT in Cologne and sandro in Munich. We will support SMCP on finding further adequate locations in Germany to reach the next expansion goals of their strategy.



Retail Strategy

Our Retail Strategy team specialise in delivering rich, data driven insights to help our clients across UK and EMEA regions to reach their retail potential. Key landlord services include:

RETAILER PROFITABILITY MODELLING

Our in-house profitability model is underpinned by a deep understanding of retailer trading models. Using retailer performance data, the tool supports detailed short and long term strategic decision making and allows landlords to stress test their retail holdings in a unique way.

Our model can be used by landlords to:

- › Review tenant profitability
- › Stress test future cost scenarios
- › Track progress of initiatives on tenant performance

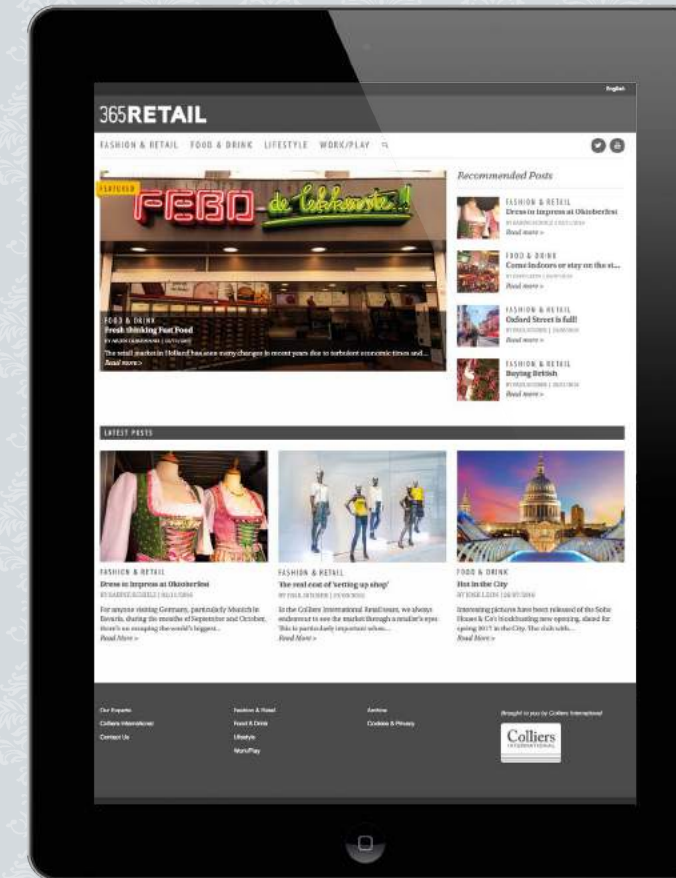
- › Establishing break even points for prospective tenants

NETWORK PLANNING

Whether it is the first store or the 100th, Colliers Retail Strategy can map the optimum network for any retail and leisure business. Our core network planning offer includes customer profiling and sales forecasting. All clients also benefit from local agency expertise, providing a store pipeline which is both deliverable and profitable.

Thought Leadership.

Our Retail Strategy and Research teams provide expert advice and a wide range of specialist services to clients across the EMEA region with market forecasting and bespoke consultancy. We also use high-quality printed and digital publications to stimulate market debate and promote our clients.



Who We Are.



**PAUL
SOUBER**
Head of Central London
& EMEA Retail Agency
+44 20 7344 6870
Paul.Souber@colliers.com

Paul is Head of Central London Retail Agency & EMEA Retail Business Team at Colliers International. He has more than 25 years’ experience of working in London retail advising landlords and retailers and has leased in excess of 1.5 million sq ft. Paul oversees the cross border retail team and co-ordinates our 230+ strong experts across EMEA.

He leads the team which advises Shaftesbury PLC on the leasing of the famous Carnaby Street Estate and Chinatown, Grosvenor’s retail holdings on their 300 acre Mayfair & Belgravia Estate. The Church Commissionaires London Estate, Connaught Village, Longmartin on their Covent Garden holdings and Cheval Group on their West End retail holdings. Major Investor clients include, Aviva, Almacantar, CBREI, Crosstree Real Estate Partners and Standard Life. Paul has also developed a specialism in the capital’s luxury retailing sector. Paul has acquired over 500 stores for his clients including Boux Avenue, Headmasters, Jaeger, Kering Group, Oliver Bonas, Sweaty Betty and Descente.



**ETIENNE
VAN UNEN**
Partner | Director Retail |
Co-Head EMEA Retail
+31 20 540 55 63
Etienne.vanUnen@colliers.com

Etienne specialises in advising on the development and leasing of major shopping centres. He also has a specialism in working with retailers such as IKKS and Mango on their strategic expansion.

An award-winning adviser, Etienne has a deep understanding of both sides of the retail property sector and uses this understanding to deliver practical and added-value solutions for his clients.



**ANNA
NIKANDROVA**
Partner | Moscow
+7 495 258 5151
Anna.Nikandrova@colliers.com

Anna has been involved in leasing some of Russia’s most high profile shopping malls including the SEC Gallery project in St Petersburg where she completed more than 100 transactions. She leads Colliers’ retail teams in both Moscow and St. Petersburg. Her expertise encompasses retail property contracts, concept development and the leasing of shopping malls.

Her clients include SRV Group, Fort Group, Stockmann, Dorinda Invest, Titan Development, Crocus Group, SIIC, Alice Construction Corporation, GC Tashir, Hals Development and RRY Capital.



**HAAKON
REED-LARSEN**
Head of Retail | Oslo
+47 48 29 98 34
Haakon.Reed-Larsen@colliers.com

Haakon has more than 20 years’ experience working for brands in the Nordic retail property markets.

His experience encompasses devising leasing strategies for retailers retailer representation and advising on strategic expansion, store roll-out programmes, lease negotiations and asset management.

He joined Colliers International in 2012 as Head of Retail and his clients include TGR Norway, Specsavers Norway, Glitter, Hunkemöller, Sigdal, Tommi’s Burger Joint, Vitus and Elkjop.



MARTA MACHUS –BUREK

**Partner | Director |
Retail Agency**

+48 691 711 235
Marta.Machus-Burek
@colliers.com

Marta has almost 20 years' experience of working in the retail real estate business in Poland. Since 2013, she has led Colliers' Polish Retail Advisory and Retail Agency Team. Under her direction the team offer strategic advisory, leasing services for new retail developments and re-leasing services for existing centres as well as transaction services for retailers developing their stores in shopping centres, office buildings and in high streets.

Marta advises Polish retailers on store expansion, and her experience encompasses asset management, centre marketing, leasing, investment advisory and strategic advisory for developers and investors of shopping centres.

The wide range of clients she has acted for include Carrefour, IKEA, CBRE Global Investors, ING Real Estate Management, Akron, TK Development, Credit Suisse, Redevco, Raiffeisen Evolution, Redema, Rockspring, Elbfonds, Futureal and Heitman.



BOSKO TRIFUNOVIC

**Associate Director
Stuttgart**

+49 711 227332-0
Bosko.Trifunovic
@colliers.com

Bosko has 2 years' experience of working in the retail real estate business in Germany. Since 2015, he has led Colliers' German Retail Advisory and Retail Agency Team focusing on retail letting in Stuttgart and the whole of the Baden-Württemberg region.

Bosko advises retailers on store expansion, and his experience encompasses centre marketing, leasing and investment advisory.

The wide range of clients he has acted for include Decathlon, Lindt & Sprüngli, LBBW Immobilien Asset Management, Hans im Glück Franchise GmbH, IKKS, Scotch & Soda, Hugo Matthaes Verlag, Blume 2000.



ANTHONY CROW

Consultant | Vienna

+43 1 535 53 05-34
Anthony.Crow
@colliers.com

Anthony has now almost 6 years' experience of working in the retail real estate business in Austria and CEE. Since summer 2017, he is part of the retail team in Austria.

Anthony is responsible for leasing services for new retail developments and re-leasing services for existing centres as well as transaction services for retailers developing their stores particularly in high streets but also in shopping centres, mixed-use concepts and urban development areas .

Anthony advises national and international retailers and restaurateurs on store expansion, and his experience encompasses asset management, sales , leasing and strategic advisory for developers and investors of shopping centres.

The wide range of clients he has acted for includes. IKEA and IKEA Centres, CBRE Global Investors, Burger King, Lidl, Marionnaud, Domino's Pizza, L'Osteria, AEW Europe and Immofinanz.



STUART GISSING

**Regional Director
Middle East**

+971 4 453 7400
Stuart.Gissing
@colliers.com

Stuart is a retail property expert who has advised on the development of some the most prominent shopping malls around the Middle East and North Africa including the 4m sq ft foot Mall of Arabia.

He is Colliers' Middle East Regional Director and is currently working on retail and mixed-use projects providing in excess of 5m sq ft of leasable space.

Stuart also provides consultancy services to mall owners, developers and multi-branded retailers in over eight countries around the Gulf Region.



HELLE ANDERSEN

**Commercial Property Agent
Copenhagen**

+45 58 58 38 03
Helle.Andersen
@colliers.com

Helle has worked with Colliers International for the previous 5 years. Previously Helle worked with international and national retailers wanting to establish themselves primarily in the Copenhagen area. Since 2017 Helle has led the Copenhagen Retail Team, which focuses on strategic advisory services, leasing- and transaction services.

Helle advises Copenhagen retailers when searching for new locations looking to expand. Helle's experience encompasses leasing, investment advisory and strategic advisory for both tenants and letters.

The wide range of clients she has acted for includes SG Nordic, Keystone, Kirkbi, Velorbis, CPH Living, FitnessDK, LOOP Fitness and Coffee Collective.

Our USPs.

- 230+ retail professionals across 31 EMEA countries
- Entrepreneurial approach
- Genuine senior involvement
- One team
- Track record
- Global reach
- Research – retail strategy

365retail.eu

