



# SERBIA&CROATIA RETAIL Wecoverit

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## MACRO-ECONOMIC OVERVIEW



London Moscow Stockholm Amsterdam

#### Up to 2hrs

Duserdolf Frankfurt Kiev Milan Munich Paris

Praque

Rome Vienna Zurich Tivat

Zagreb

Up to 1hr

**Bucharest** 

Istanbul

Liubliana

- Serbia is located in the Southeastern Europe, in the central part of Balkan Peninsula, at the intersection of Pan European Corridors X and VII (Danube River), on the way from Europe to Asia.
- Pan European Corridor X is the most important European highway corridor passing through the country, leading from Salzburg through Belgrade and Nis, and further branching off to Athens and Sofia.
   Another branch of the corridor links Belgrade with Budapest.
- EU candidate status, gained in March 2012; On-going EU accession negotiations, full membership expected in 2025.



### SERBIA RETAIL MARKET

#### **KEY FACTS - SERBIA**

Population:	7,186,862
Modern retail stock:	907,000 GLA
Average household expenditure 2019:	EUR 569

Over the years, Serbian retail market has become an interesting destination for many international brands. The existing stock of modern shopping centers recorded a large percentage of occupancy, while in recent years, high-street retail have become richer for more international brands. Despite the lower standard of living, Serbian population can be characterized as a consumer population.

Although Serbia is still underdeveloped as compared to the rest of the region, the retail market continues to pick up after the economic downturn. The current time is considered attractive for international retailers as they have the opportunity to position themselves in the market which is expected to grow moving closer to EU accession.

The modern retail stock in whole Serbia stands at the level of app. 907,000 sq m of GLA, whereas 43% is available in the capital.

### SERBIA SHOPPING CENTER STOCK IN SQ M GLA

### SERBIA RETAIL MARKET DEVELOPMENT



### 907,000 sq m GLA

Retail stock in Q3 2019 126 sq m per 1,000 inhabitants

### 197,000 sq m GLA

Shopping centers under construction

### 1,100,000 sq m GLA

Retail stock by 2020YE

### 150 sq m GLA

Retail stock per 1,000 inhabitants by 2020YE

# BELGRADE RETAIL MARKET

#### **KEY FACTS - SERBIA**

Population:	1,659,440
Modern retail stock:	398,000 GLA
Average household expendit	ure 2019: EUR 632

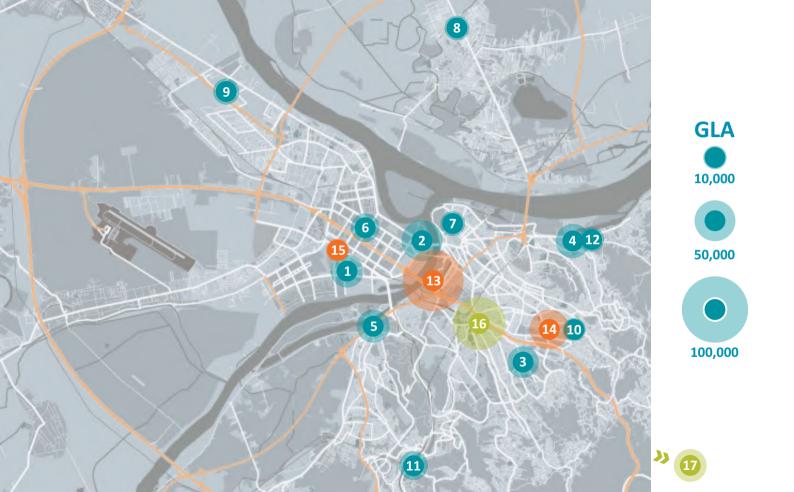
Belgrade as the capital dominates the real estate scene. The presence of shopping centres is still far from the world trends and from the trends in more developed countries of Eastern and Central Europe. Due to the limited offer, Belgrade rarely sees any vacant space in the prime shopping centers. In general, the vacancy rate is usually around 5%.

#### RETAIL STOCK IN BELGRADE, PER TYPES OF SHOPPING CENTERS



## BELGRADE SHOPPING CENTERS

	RETAIL PROJECT	GLA	RETAIL TYPE	PHASE	
1	Delta City	30,000	Western-type shopping center		
2	Usce shopping center	47,000			
3	Stadion SC	28,000			
4	BIG Fashion	32,000			
5	Ada Mall	34,000			
6	Mercator	21,000		Opened projects	
7	Rajiceva Shopping Mall	15,000	Neighborhood mall		
8	Stop.Shop Borca	13,000		_	
9	Zemun Park	16,000	Retail Park		
10	Aviv Park Beograd	11,000			
11	Capitol Park Rakovica	23,300			
12	BIG Fashion Park	14,800			
13	Belgrade Waterfront	app. 93,000	Western-type shopping center	Under	
14	BEO Shopping center	app. 44,000		Construction	
15	West 65	app. 11,000	Neighborhood mall		
16	Delta Planet	app. 70,000	Western-type S.C.	01	
17	IKEA Retail Park	30,000	Retail Park	Planned	



# DELTA CITY SHOPPING CENTER





#### **ABOUT SHOPPING CENTER**

LOCATION Jurija Gagarina Street

CATCHMENT AREA 250,000

OPENING YEAR 2007

**SIZE** 30,000 GLA

VACANCY RATE 0%

ANNUAL FOOTFALL App. 10 million

#### **MAJOR TENANTS**

FASHION H&M, Inditex brands, Sportina,

Armani Exchange, Esprit, Timberland

ACCESSORIZE/ Parfois, Pandora,

BAGS / WATCHES Swarovski, Bomar

SHOES Deichmann, Aldo, Bata

HEALTH & BEAUTY Sephora, Lilly, L'Occitane

KIDS DexyCo Kids, Ciciban

ENTERTAINMENT Cineplexx

FOOD AND BEVERAGE McDonalds, KFC, Maxi

#### **ABOUT SHOPPING CENTER**

LOCATION Mihajla Pupina Blvd.

OPENING YEAR 2009

**SIZE** 46,650 GLA

VACANCY RATE 0%

ANNUAL FOOTFALL App.11 million

#### **MAJOR TENANTS**

FASHION Inditex brands, XYZ, LC Waikiki

ACCESSORIZE/ Carpisa, Pandora,

BAGS / WATCHES The Manual Co., Parfois

SHOES Deichmann, Aldo, Bata

HEALTH & BEAUTY MAC, Sephora, Lilly, dm drogerie markt

KIDS DexyCo Kids, BebaKids

ENTERTAINMENT Cineplexx, Fitness and Gym

FOOD AND BEVERAGE Vapiano, McDonalds, KFC, IDEA

# **USCE**SHOPPING CENTER





# ADA MALL SHOPPING CENTER





#### **ABOUT SHOPPING CENTER**

LOCATION Radnicka Street

CATCHMENT AREA 450,000

OPENING YEAR 2019 (May)

**SIZE** 34,000 GLA

VACANCY RATE N/A

ANNUAL FOOTFALL N/A

#### **MAJOR TENANTS**

FASHION Fashion&Friends, H&M, Cropp, House,

Mohito, Reserved, Lindex, LC Waikiki,

Piazza Italia, Replay

ACCESSORIZE/ WATCHES Pandora, Watch is watch, Zlatarna Celje

SHOES 29Hills, Ecco, Buzz, Kicks&Heelz, Melissa

dm drogorio Vioble Jasmin

HEALTH & BEAUTY dm drogerie, Kiehls, Jasmin,

The Body Shop, Lilly

KIDS Jungle baby, Maison Marasil, Monsoon

ENTERTAINMENT CineStar

FOOD AND BEVERAGE Mercado, McDonalds, KFC, Burrito Madre

#### **ABOUT SHOPPING CENTER**

LOCATION Zaplanjska Street

OPENING YEAR 2013

SIZE 28,000 GLA

VACANCY RATE 0%

ANNUAL FOOTFALL App. 6 million

#### **MAJOR TENANTS**

FASHION LC Waikiki, H&M, Intersport,

Springfield, Calzedonia, Sportina

ACCESSORIZE/ Carpisa, Zlatarna Celje,

BAGS / WATCHES Parfois

SHOES Deichmann, CCC

HEALTH & BEAUTY Lilly, dm drogerie markt

KIDS DexyCo Kids

ENTERTAINMENT Dreamland Playground FOOD AND BEVERAGE McDonalds, KFC, RODA

# **STADION**SHOPPING CENTER





### BIG FASHION SHOPPING CENTER & RETAIL PARK





#### **ABOUT SHOPPING CENTER**

LOCATION Višnjička Street

CATCHMENT AREA 215,000

OPENING YEAR 2017

SIZE 32,000 + 14,800 GLA

VACANCY RATE 0%

ANNUAL FOOTFALL App. 6 million

#### **MAJOR TENANTS**

FASHION LC Waikiki, H&M

Inditex, Decathlon

ACCESSORIZE/ Swarovski, Pandora,

BAGS / WATCHES Zlatarna Celje, Bomar

SHOES Deichmann, CCC

HEALTH & BEAUTY Lilly, Sephora

KIDS DexyCo Kids, BebaKids, Carters

ENTERTAINMENT Cineplexx, Cosmoland

FOOD AND BEVERAGE McDonalds, KFC, IDEA

#### **ABOUT SHOPPING CENTER**

LOCATION Kneza Mihaila Street

CATCHMENT AREA 150,000
OPENING YEAR 2017

**SIZE** 15,300 GLA

VACANCY RATE 0%

ANNUAL FOOTFALL App. 7 million

#### **MAJOR TENANTS**

FASHION Tommy Hilfiger, Sportina, Bagatt, Levi's,

Armani Exchange, Gagliardi, Intersport,

Esprit, Lindex, Superdry, Beosport

ACCESSORIZE/ Pandora, BAGS / WATCHES Carpisa

SHOES Nursace, Nine West, Dune London

HEALTH & BEAUTY Jasmin, dm drogerie markt

KIDS Lego, Trefolino, Moj Grad Igraonica

FOOD AND BEVERAGE Maxi, Vapiano

### RAJIĆEVA SHOPPING CENTER





### MERCATOR CENTER





#### **ABOUT SHOPPING CENTER**

LOCATION Umetnosti Boulevard

CATCHMENT AREA 200,000

OPENING YEAR 2002

**SIZE** 21,400 GLA

VACANCY RATE 0%

ANNUAL FOOTFALL App. 4.5 million

#### **MAJOR TENANTS**

FASHION LC Waikiki, Movem, Lindex,

Intersport, Springfield, Tom Tailor

ACCESSORIZE/ Samsonite, Pandora,

BAGS / WATCHES Zlatarna Celje, Parfois

SHOES Fratelli Rossetti, Bata, Geox

HEALTH & BEAUTY dm drogerie markt

KIDS BebaKids, S&D, Moj Grad Igraonica

FOOD AND BEVERAGE Mercator hypermarket

## BELGRADE RETAIL MARKET DEVELOPMENT

### 398,000 sq m GLA

Retail stock in Q3 2019 2430 sq m per 1,000 inhabitants

### 156,000 sq m GLA

Shopping centers under construction

### 550,000 sq m GLA

Retail stock by 2020YE

### 330 sq m GLA

Retail stock per 1,000 inhabitants by 2020YE

# BELGRADE RETAIL SUPPLY & DEVELOPMENT





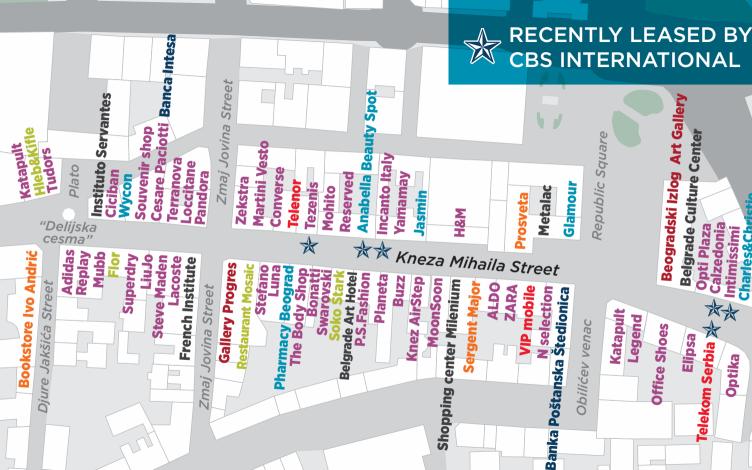
Since Belgrade has limited modern shopping center stock, the high-street retail remains very important retailing environment. The prime high retail streets have strong footfall and represent vital retail spot in the consumers' mindset. Often new market entrants initially aim to build brand awareness with a high-street presence.

#### **RENTAL LEVELS**

BELGRADE HIGH	SIZE OF UNITS (SQ M)		
STREET ZONE	<150	150-500	>500
Knez Mihailova Street	Up to 100*	60-80	40-60
Terazije Square/ Kralja Milana Street/ Kralja Aleksandra Boulevard	45-60	30-45	20-30
Secondary High Street Pozeska Gospodska	40-50 35-45	25-35 25-35	10-20 10-20
Modern Shopping Centers	50-70	35-50	Up to 35

<sup>\*</sup>Smaller retail units (<100 sqm) in Knez Mihajlova Street could command the rental levels more than EUR 100/sqm





**Art Gallery** Belgrade Culture Center Beogradski Izlog Opti Plaza

Elipsa

Telekom Serbia

Calzedonia Intimissimi Charles&Ch Max Mara

Optika



**Eurobank** 

Terazije Street

**McCann Office** 

Service

**Health & Beauty** 

**Fashion & Accessories** 

**Bookstores & Kids** 

**Gallery** 

**Electronics** 

Knez Mihajlova Street

Street

Homer Pizza

**Exchange office** Tiffany **Balkan Bet**  WinWin

Springfield

Extreme intimo **IStyle** 

Diopta Caribic Pizza Zepter Hotel

Mona Stefano Shoestar For rent Aleksandar Junior

Pro piu grande

Super WOK Asian Food

**Negro Caffe** 

OTP Bank Balasević Jewelry Papić

Department Stores (OVS)

Belgrade

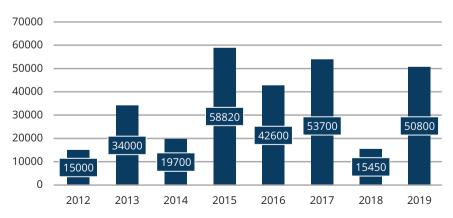
TERAZIJE STREET

Komercijalna Banka and Restaurant **Burritto Madre** Wd8 esoq<sub>168</sub> Keeks & Heel2 Till Rasis State of the State o Kasina Hotel Deichmann Službeni glasnik **McDonalds** Istambul Market ESUIDS **Pharmacy** Zlatarna Celje Partizan shop Ray Ban **Obuca Pavle** Bonatti **Fly London** Camper Nicolas Mona Terazije Street Terazije Street Street **Exit Outlet Tudors** Sloboda Theater Solunac Siberian Health Western Union Restaurant Kod dvoglavog orla La Sorella Loriblu Stepland City Pub Terazije Grubin SBB Optics Loris Perfumes Panter Exhcange Office Telekom Serbia Prizrenska Soho jewelry Serbian Orthodox Church souvenirs Cajkovski Restaurant Cafe Moskva Moskva Hotel Balkanska Street

## RETAIL PARKS IN SERBIA

- Retail parks lead development sector in Serbia, marking huge expansion in the previous few years
- Share of the retail park formats is on rise, currently amounting to **35% of the total stock**, as compared to the share of 11% marked in 2011

#### **RETAIL PARK COMPLETIONS 2012-2019**



Location	Project Size (s	sq m GLA)		
Belgrade	Zemun Park	16,000	Subotica	
Belgrade	Aviv Park Zvezdara	11,500		GLA 70
Belgrade	Stop.Shop Borca	13,000		JLA /C
Belgrade	Stop.Shop Lazarevac	10,000	Sombor	
Belgrade	Capitol Park Rakovica	23,300		35
Belgrade	BIG Fashion Retail Park	14,800	N. C. I	0.5
Cacak	Stop.Shop Cacak	6,320	Novi Sad	25
Indjija	BIG Fashion Park Indjija	15,000	Sremska Zrenjanin	• <10
Jagodina	Vivo Shopping Park	10,000	Mitrovica Indjija Vrsac	
Kragujevac	Delta Park	14,000		
Kraljevo	NEST Kraljevo	9,500	Pancevo	
Nis	Stop.Shop Nis	13,500	Sabac	
Novi Sad	BIG Novi Sad	34,000	Smederevo	
Pancevo	BIG Pancevo	30,000	Belgrade Pozarevac	
Pozarevac	Stop.Shop Pozarevac	7,207	rozaievac	
Sabac	Capitol Park Sabac	9,700	•	
Smederevo	Shoppi Smederevo	9,500	Valjevo	
Sombor	Capitol Park Sombor	5,200	. Kragujevac	
Subotica	Shoppi Subotica	10,000	Gornji Milanovac	Zajeca
Valjevo	Stop.Shop Valjevo	6,100	Jagodina	,
Vrsac	Stop.Shop Vrsac	8,250	Cacak	
Zrenjanin	BIG Park Zrenjanin	25,560	Uzice Kraljevo	
Leskovac	Capitol Park Leskovac	6,500	V	
Zajecar	Capitol Park Zajecar	6,500	UNDER CONSTRUCTION Krusevac	Nis
S.Mitrovica	Stop.Shop S.Mitrovica	7,500	G.Milanovac Shop Park (Q2 2020) 6,500	
Krusevac	NEPI Shopping Park	9,000	Beograd Kapitol Park Surcin (Q3 2020) 30,000	
Zajecar	Capitol Park	6,500	Vrsac NEST (Q2 2020) 3,000	
Uzice	NEST Uzice	7,000	Obrenovac NEST (Q3 2020) 8,500 L	eskovac
Sr.Mitrovica	Stop Shop	7,000	Kragujevac RAJ Park (Q2 2020) 18,000	

70,000

35,000 25,000 <10,000

Zajecar



#### **BEO SHOPPING CENTER**

Size: 44,000 sq m GLA Developer: MPC Properties Opening year: Autumn 2020



#### **BELGRADE WATERFRONT GALERIJA**

Size: 93,000 sq m GLA Developer: Eagle Hills Opening year: 2020 end

#### **WEST 65**

Size: 11,000 sq m GLA Developer: PSP-Farman Holding Opening year: 2020 end



#### **DELTA PLANET NIŠ**

Size: 30,000 sq m GLA Developer: Delta Real Estate Opening: 2020 end



### OCCUPIERS FOCUS

The retail market has come under focus of international brands, developing into an interesting retail destination in the Balkans.

As compared to the other countries in the region, Serbia is relatively under-supplied, which represents an excellent opportunity for the international retailers to achieve first mover advantage and position themselves in the market.

# THE MOST ACTIVE INTERNATIONAL RETAILERS

INDITEX	14 stores	3 cities
HEM	14 stores	9 cities
dm	99 stores	27 cities
LC Walkiki	28 stores	17 cities
NEWYORKER	23 stores	16 cities
JYSK	30 stores	22 cities
DEICHMANN	27 stores	23 cities
<b>McDonald's</b>	28 stores	8 cities
TENDAM GLOBAL FASHION RETAIL	23 stores	4 cities

#### THE LARGEST FRANCHISEES

### FFASHION COMPANY

SCOTCH&SODA



TOMMY = HILFIGER



MANGO LIU:JO













### SPORTINA











PARFOIS

































RESERVED

























WE ALL START SMALL, AND WE ALL WANT TO GROW...



#### CONTENT

MACRO-ECONOMIC OVERVIEW

CROATIA RETAIL MARKET

ZAGREB RETAIL MARKET

**ZAGREB SHOPPING CENTERS** 

**ZAGREB HIGH-STREET** 

**OTHER RETAIL PROJECTS** 

**OCCUPIERS FOCUS** 

**RETAIL AGENCY** 

## MACRO-**ECONOMIC OVERVIEW**

#### Up to 3hrs

London Moscow Stockholm Amsterdam

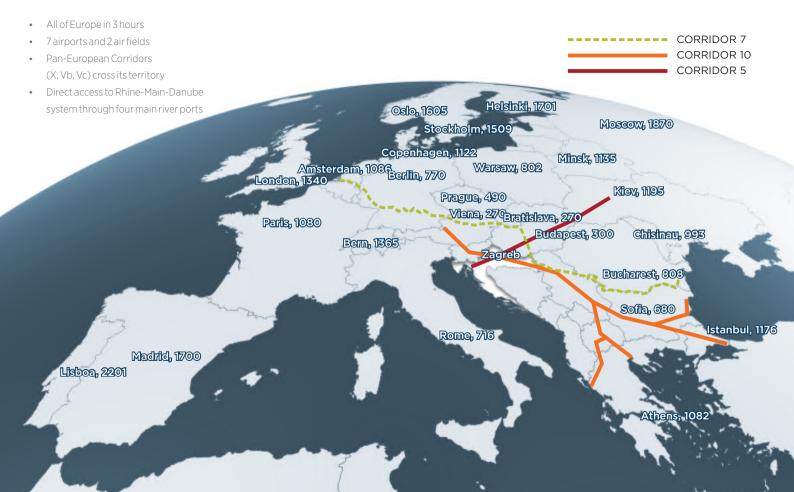
#### Up to 2hrs

Duserdolf Frankfurt Kiev Munich Paris Praque

Up to 1hr

**Bucharest** Istanbul Liubliana Rome Vienna 7urich Tivat Belgrade

- As an Adriatic, Central European country, and part of the Danube Valley, Croatia enjoys a favourable geo-communication position and is one of the most sparsely populated countries.
- Croatia has been a member of the EU as of July 2013 and further economic expansion should be boosted by the improved absorption of the EU funds and strong tourism demands.
- According to the results published by the Croatian Bureau of Statistics, GDP grew by 3.9% in Q1 2019 in comparison with the corresponding period of the previous year and also, in the period from January to May 2019, the growth of average net salary was recorded, making a nominal increase of 3.9% and a real increase of 2.5%, as compared to the same period last year.



# CROATIA RETAIL MARKET

#### **KEY FACTS - CROATIA**

Population:	4.2 million
Area:	. 56,594 m <sup>2</sup>
Average spending power 2017:	EUR 922

The Croatian real estate market is attracting notable investments, while the growing consumption, tourism and economic growth further encourage international players to expand their business in Croatia.

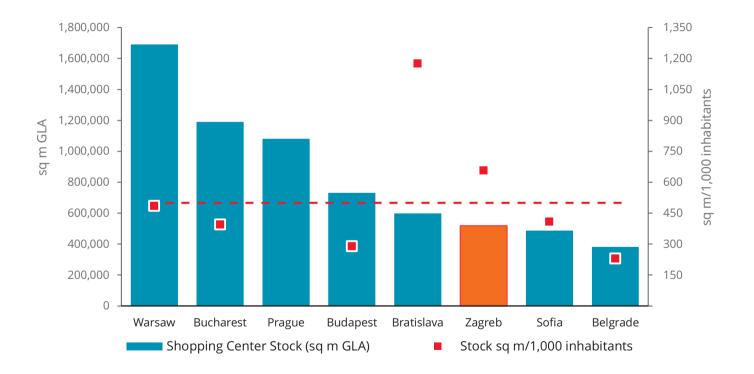
#### ZAGREB RETAIL MARKET DEVELOPMENT

520,000 sq m GLA

Retail stock in H2 2019

650 sq m GLA

Retail stock per 1,000 inhabitants



# ZAGREB RETAIL MARKET

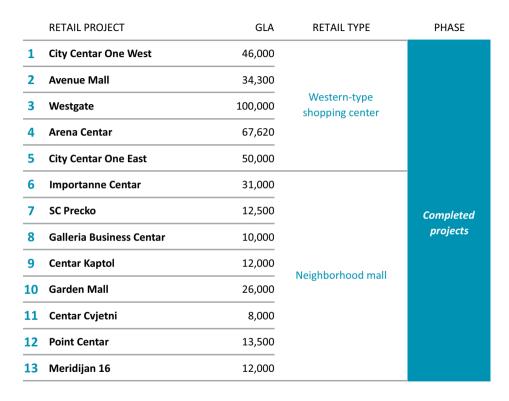
#### **KEY FACTS - ZAGREB**

- The retail market in Zagreb is considered to be the most developed. With its retail stock of app. 520,000 sq m GLA is high above the average of the capital cities of the region. This has impacted in developers moving their attention towards secondary cities, especially along the Adriatic coast.
- Many are focused in repositioning and expanding the existing retail formats, bearing in mind the vacancy rate in prime shopping centers is at the level of 4%.

#### RETAIL STOCK IN ZAGREB, PER TYPES OF SHOPPING CENTERS



# ZAGREB SHOPPING CENTERS





#### WESTGATE ZAGREB





#### **ABOUT SHOPPING CENTER**

LOCATION Zapresicka, Jablanovec

OPENING YEAR 2009

**SIZE** 67,620 GLA

ANNUAL FOOTFALL 10 mill

#### **MAJOR TENANTS**

FASHION H&M, LPP brands, Sportina, Benetton,

C&A, KiK, Pepco

ACCESSORIZE/ Parfois, Zlatarna Celje

BAGS / WATCHES Heta, Maras

SHOES Deichmann, CCC, PittaRosso

HEALTH & BEAUTY dm drogerie, Muller, BIPA

KIDS Tedi, Baby Center, Reserved ,C&A,

Next, Denis

ENTERTAINMENT Family Park, Rock`n`bowl centar

FOOD AND BEVERAGE Burger bar, Batak, Ali Kebaba, Mohito,

Bake n' Roll, Lui Caffe, Leggiero

#### **ABOUT SHOPPING CENTER**

LOCATION Avenija Dubrovnik, Siget

CATCHMENT AREA 200,000

OPENING YEAR 2007

SIZE 34,300 GLA

ANNUAL FOOTFALL 6 mill

#### **MAJOR TENANTS**

FASHION Inditex brands, H&M,

LPP brands, NewYorker

ACCESSORIZE / WATCHES Zaks, Oxette, Prahir, Croata,

Carpisa, Heta, Krona

SHOES CCC, Deichmann, Ecco, Office shoes

HEALTH & BEAUTY DM, Douglas, L`Occitane, Mueller

KIDS Ciciban, Denis, Benetton, Next, Zara

ENTERTAINMENT CineStar Blitz, Friendly Fire gaming

FOOD AND BEVERAGE KFC, McDonalds, Ali Kebaba, WokMe,

MEX, Lotus, Leggiero bar

# **AVENUE MALL** ZAGREB





#### ARENA CENTER ZAGREB





#### **ABOUT SHOPPING CENTER**

LOCATION Vice Vukova, Laniste

CATCHMENT AREA n/a

OPENING YEAR 2010

**SIZE** 65,700 GLA

ANNUAL FOOTFALL 12mill

#### **MAJOR TENANTS**

FASHION Fashion&Friends, H&M, LPP brands,

Inditex brands, Calvin Klein Jeans, XYZ

NewYorker, C&A

ACCESSORIZE/WATCHES Pandora, Zlatarna Celje, Mark Pjetri

SHOES

CCC, Deichmann, Bata, ShoeBeDo

HEALTH & BEAUTY dm drogerie, Douglas, Muller,

The Body Shop, Kiehl`s

KIDS Blu Kids, Bubamara, Magic Baby, Froddo

ENTERTAINMENT CineStar, Zrcalni labirint Sky Mare

FOOD AND BEVERAGE KFC, Burger King, Subway, McDonalds

#### **ABOUT SHOPPING CENTER**

LOCATION Slavonska av, Zitnjak

CATCHMENT AREA 270,000

OPENING YEAR 2012

SIZE 50,000 GLA

ANNUAL FOOTFALL 6,8 mill

#### **MAJOR TENANTS**

FASHION Inditex brands, Benetton, C&A, H&M,

Takko, NewYorker, Peek&Cloppenburg,

Sportina

ACCESSORIZE / BAGS Carpisa, Pandora, Maras, Zaks

WATCHES Watch Centar, Krona, Guess SHOES Deichmann, CCC, Humanic,

Mass, Ecco

HEALTH & BEAUTY Muller, Douglas, dm drogerie

KIDS Baby Center, Froddo, Ciciban, OVS, Zara

ENTERTAINMENT Cineplexx, Kids Jungle

FOOD AND BEVERAGE KFC, Burger King, Foodie, MEX,

Oranž, Leggiero

# CITY CENTER ONE EAST





# CITY CENTER ONE WEST





#### **ABOUT SHOPPING CENTER**

LOCATION Jankomir, Stenjevec

CATCHMENT AREA N/A

OPENING YEAR 2006

SIZE 46,719 GLA

ANNUAL FOOTFALL 6,5 mill

#### **MAJOR TENANTS**

FASHION Armani Exchange, H&M, Inditex brands,

Fashion&Friends, Peek&Cloppenburg

ACCESSORIZE/WATCHES Carpisa, Maras, Pandora,

Parfois, Swarovski

SHOES Deichmann, Humanic, Timberland

HEALTH & BEAUTY dm drogerie, Douglas, Muller, Kiehl`s

KIDS Baby Center, Okaidi, OVSkids, S.Oliver

ENTERTAINMENT Kids jungle

FOOD AND BEVERAGE KFC, McDonalds





#### BANA JOSIPA JELACICA SQUARE GALERIJA MALA SPORTSWEARE **ADDIKO BANK** GAVRILOVIC **AZURTOURS** Splavnica PHARMACY 5 BIG FIVE BASLER VARTEX MULLER Augusta Cesarca **JOHANN FRANCK** SKINNY DIONA **MARTIMEX** ZAKS **PAUL & SHARK** Bana Josipa Jelacica Square **TOURIST INFORMATION CENTER** Nikole Jurisica TELE2 Ilica **PAN PEK** AMERICAN STEAK&GRILL **ADMIRAL** KAVANA DUBROVNIK **BIRO GALERIJA ŠK.KNJIGA-ARKADIJA** TOP NICHE KRAŠ GALERIJA ZAKLADE CROATIA OSIGURANJE TISAK MEDIA **OTP BANKA** PATRIZIA PEPE MLINAR Frane Petrica **FAN SHOP DINMO** praska Ljudevita Gaja CAMEA

**LONCI I POKLOPCI** DODIC JEWELLERY SCOTCH&SODA **VERONIKA DELIKATESE MW MODERATO** NATURE HOUSE MARC O POLO AMELIE FASHION **TEA FASHION SVIJET TKANINE TOP SHOP** WOK'N'WALK **ASIA STORE MI STORE PAN PEK** CALEIDOS BIPA **ANTIQUE JEWELLERY BIO BOUTIQUE** SKINY ZEA SHOPINGHOLICARKA BOOKSTORE TRUE **ARA SHOP** LUSH **BOOKSTORE** ROSSI **BIO&BIO KONZUM DELIKATESE** DIONA ELEGANCE LEVEL 2 **BASHOTA ZLATAR IRIUMPH** MONOKL **ONTARIO SPORTSWEAR** MLINAR ZLATARNA **PRAHIR** PHARMACY **KROJ&BROJ MONTRE STORE** ZRNO FAMILY **PROSVJETA** ALPINA MARAS **GHETALDUS OPTIKA ETNA MAAR ETNO BUTIK MA** THE SUSHI BAR LAVANDA MIA CENTRA KAPPA DOUGLAS MY BOUTIQUE POUNJE PREHRANA KONZUM Σ

MAP

OF HIGH

**STREETS** 

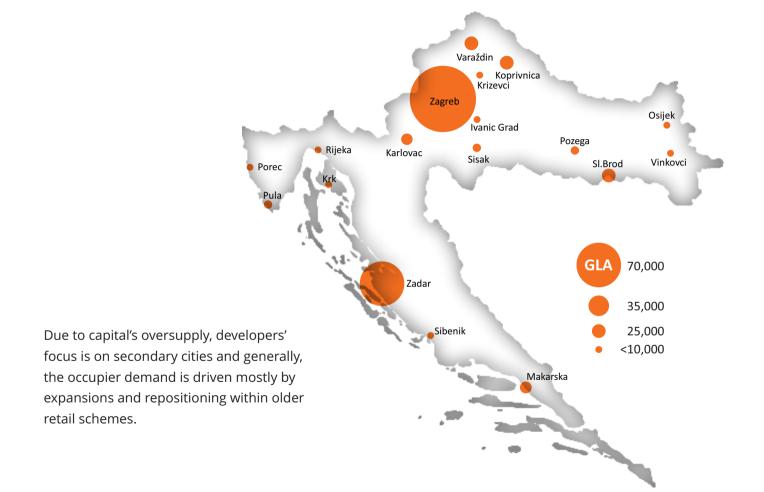
CLOFCTAD

SVIJET OBUCE

#### ILICA STREET **ZAGREBACKA BANKA DESSANGE PARIS** HOTEL JAGERHORN **OPTIKA OPTOTIM** WOMEN'SECRET POSTELJINA.HR **GERRY WEBER** YVES ROCHER OFFICE SHOES CALZEDONIA **OPTIKA ANDA PARAMOUNT** SPRINGFIELD SHOOSTER DOUGLAS BENETTON SHOE BOX **TOSCA BLU** MODELINE PALMERS VARTEKS ZAKS NAF NAF GALILEO ALPINA MANGO VINCEK **CARPISA** ALIZEE STEFF MONA MASS GEOX NAMA ZARA HOGL ECCO Σ **PELATI KRAS** -AVHION&PRIENDS GALILEO AND HIGH VOUGE NERA NAS DOM **LISCA** DOLL 22 KENTBANK INTIMISSIMIT ××× **TEZENIS ELISABETTA FRANCHI** CALLIOPE MOCCA PIZZA **JEWELLERY** DIADEMA PARFUMERIJA LANA ADIDAS **BETTY BARCLAY** SWAROVSKI **BIO&BIO** PAN-PEK CAFFE YAMAMAY **TERRANOVA** ELYSEES PANDORA RESTAURANT ORANZ **GIFTS&SOUVENIRS** ROBERTO **KNJIZARA LJEVAK SVIJET OBUCE**

# OTHER RETAIL PROJECTS

Location	Project	Size (sq m GLA)
Zadar	SUPERNOVA	68,000
Zadar	Shopping Capitol	8,138
Vinkovci	Shopping Capitol	7,000
Varaždin	SUPERNOVA	19,000
Sl.Brod	SUPERNOVA	23,392
Sl.Brod	Capitol Park	5,402
Sisak	SUPERNOVA Sisak Eas	st 5,100
Sisak	Capitol Park	4,500
Sibenik	SUPERNOVA Sibenik	7,800
Rijeka	Marti Retail Park	9,000
Pula	City Mall	22,400
Pozega	Shopping Capitol	4,722
Porec	Galerija Porec	8,300
Osijek	STC Osijek	6,800
Makarska	Capitol Park	14,200
Krk	Shopping Capitol	4,850
Krizevci	Capitol Park	4,100
Koprivnica	SUPERNOVA Koprivni	ca 19,941
Karlovac	SUPERNOVA Karlovac	18,000
Ivanic Grad	Capitol Park	5,240
Kutina	Capitol Park	2,500



# OCCUPIERS FOCUS



# THE MOST ACTIVE INTERNATIONAL RETAILERS

INDITEX	39 stores	5 cities
HaM	15 stores	10 cities
dm	160 stores	38 cities
M Müller	89 stores	34 cities
NEWYORKER	25 stores	19 cities
<b>JYSK</b>	43 stores	38 cities
DEICHMANN	35 stores	28 cities
<b>McDonald's</b>	34 stores	14 cities
DOUGLAS	29 stores	12 cities

#### **NEWCOMERS 2018-2020**

#### THE BIGGEST FRANCHISES





**FFASHION COMPANY** 









**LIUJO** 





**STEVE MADDEN** 



JO MALONE

LONDON







GAUDÌ



**REPLAY** 























BAKER®

## RETAIL AGENCY

#### **HOW CAN WE HELP?**

CBS International's retail team gives full support to the international investors, facilitating their market introduction offering variety of services ranging from advisory and tenant mix definition to brokerage, project management and marketing. Our retail professionals are at your disposal to brief you on the latest market trends and provide you with the best offer matching your requirements

#### **SCOPE OF SERVICES**

- New Lease Acquisitions
- Rent Reviews and Renewals
- Tenant Mix Definition
- Specialized Project Management Services
- Tenant Representation & Landlord Representation

#### MARKET KNOWLEDGE

- Retail Agency team specializes in high street retail, shopping centers advisory and brokerage, retail parks and retail warehouse
- 7 licenced real estate professionals working in the Retail Agency

- Market presence Create strategic roadmaps for growth, whether opening new stores, searching for new markets, or taking your concept across borders.
- Decisive strategies Speed up retail real estate decisions by providing a rational business case based on objective definitions and clearly established indicators for successful stores.
- Portfolio performance Formulate an action plan to reposition the portfolio where occupancy costs exceed acceptable levels for sales in a given location or prototype, realigning the portfolio for sales growth.
- Brand building Evaluate the potential benefits and impacts of Increasing the retail footprint by new brand, including which outlets will be most valuable and rationalizing overlapping or duplicate locations.



# ABOUT US

\_\_\_\_\_\_COUNTRIES

120+

12+

1700+

YEARS OF MARKET PRESENCE IN THE REGION

CBS International is a member of Cushman &Wakefield Alliance, a leading global real estate services firm, operating with 53,000 employees in more than 60 countries worldwide.

Cushman & Wakefield is among the largest commercial real estate services firms with revenue of \$8.8 billion across core services.

#### **Brokerage Services**

- Office Agency
- Retail Agency
- Residential Sales and Lease Agency
- Industrial & Land Agency

#### **Consultancy Services**

- Valuation & Development Advisory
- Capital Markets
- · Market Research
- Project Management
- Property and Facility Management
- Marketing



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## **CHOICE OF CLIENTS**













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