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INTERNATIONAL

SERBIA & CROATIA RETAIL²⁰²¹ POTENTIAL & CAPABILITIES



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INTERNATIONAL

SERBIAN RETAIL 2021



CONTENT

MACRO-ECONOMIC OVERVIEW

SERBIA RETAIL MARKET

BELGRADE RETAIL MARKET

BELGRADE SHOPPING CENTERS

BELGRADE HIGH-STREET

RETAIL MARKET DEVELOPMENT

LANDLORDS FOCUS

OCCUPIERS FOCUS

CHOICE OF CLIENTS

MACRO-ECONOMIC OVERVIEW



- 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. EU is Serbia's historical and natural most important trade partner, so the market will drive towards the harmonization with the EU as well as the official policy that is on this course.

 CORRIDOR 7
 CORRIDOR 10





SERBIA RETAIL MARKET

KEY FACTS - SERBIA

Population: 7,186,862
Modern retail stock: 1,120,000 GLA
Average net salary 2020: EUR 511

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. 1,120,000 sq m of GLA, whereas 48% is available in the capital.

SERBIA SHOPPING CENTER STOCK IN SQ M GLA



SERBIA RETAIL MARKET DEVELOPMENT

1,120,000 sq m GLA

Retail stock in Q3 2021

156 sq m per 1,000 inhabitants

55,500 sq m GLA

Shopping centers under construction

BELGRADE RETAIL MARKET

KEY FACTS - BELGRADE

Population: 1,659,440

Modern retail stock: 542,000 GLA

Average net salary 2020: EUR 632

Belgrade as the capital dominates the real estate scene, with its retail stock of app. 542,000 sq m of GLA has reached the cities such as Zagreb and Bratislava in terms of the overall offer. Population-wise, those cities are smaller than Belgrade, and their offer per 1,000 inhabitants is much higher.



BELGRADE RETAIL MARKET DEVELOPMENT

Retail stock in Q3 2021

542,000 sq m GLA

327 sq m per 1,000 inhabitants

Shopping centers under construction

41,000 sq m GLA

Retail stock in 2022

583,000 sq m GLA

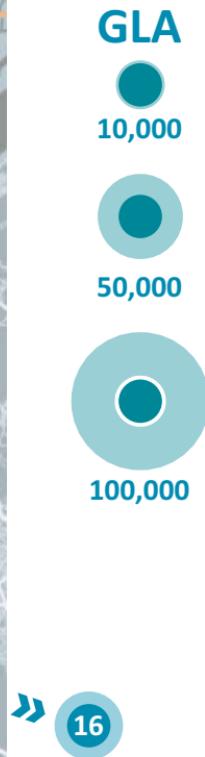
350 sq m per 1,000 inhabitants

BELGRADE RETAIL SUPPLY DEVELOPMENT



BELGRADE SHOPPING CENTERS

	RETAIL PROJECT	GLA	RETAIL TYPE	PHASE	
1	Delta City	30,000	Western-type shopping center	<i>Opened projects</i>	
2	Usce Shopping Center	46,650			
3	Stadion SC	28,000			
4	BIG Fashion	32,000			
5	Ada Mall	34,000			
6	BEO Shopping Center	43,000			
7	Galerija Beograd	93,000			
8	Mercator	21,000	Neighborhood mall	<i>Under Construction</i>	
9	Rajiceva Shopping Mall	15,000			
10	Stop.Shop Borca	13,000	Retail Park		
11	Zemun Park	16,000			
12	Aviv Park Beograd	11,000			
13	BIG Rakovica	24,000			
14	BIG Fashion Park	14,800	Neighborhood mall		
15	West 65	app. 11,000			
16	AVA Retail Park	30,000	Retail Park	<i>Under Construction</i>	



DELTA CITY SHOPPING CENTER



ABOUT SHOPPING CENTER

LOCATION	Jurija Gagarina Street
INVESTOR	Hyprop Investment
CATCHMENT AREA	250,000
OPENING YEAR	2007
SIZE	30,000 GLA
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

USCE SHOPPING CENTER

ABOUT SHOPPING CENTER

LOCATION	Mihajla Pupina Blvd.
INVESTOR	MPC Properties/Atterbury Property
CATCHMENT AREA	300,000
OPENING YEAR	2009
SIZE	46,650 GLA
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



GALERIJA BELGRADE



ABOUT SHOPPING CENTER

LOCATION	Belgrade Waterfront
INVESTOR	Eagle Hills
CATCHMENT AREA	500,000
OPENING YEAR	2020
SIZE	93,000 GLA
ANNUAL FOOTFALL	n/a

MAJOR TENANTS

FASHION	Inditex brands, United Colors of Benetton, XYZ, LC Waikiki,
ACCESSORIZE/	Carpisa, Pandora,
BAGS/WATCHES	The Manual Co., Parfois,
SHOES	Deichmann, Aldo, Bata
HEALTH & BEAUTY	Sephora, Lilly, dm drogerie markt
KIDS	DexyCo Kids, BebaKids
ENTERTAINMENT	Cineplexx, Fitness and Gym
FOOD AND BEVERAGE	Vapiano, McDonalds, KFC, IDEA

LOCATION	Radnicka Street
INVESTOR	GTC
OPENING YEAR	2019
SIZE	34,000 GLA
ANNUAL FOOTFALL	N/A
MAYOR TENANTS	Fashion&Friends, H&M, LC Waikiki, CCC, dm drogerie markt, Cropp, Kicks&Heelz, McDonalds, KFC, CineStar
LOCATION	Zaplanjska Street
INVESTOR	Eurobau connect
OPENING YEAR	2013
SIZE	28,000 GLA
ANNUAL FOOTFALL	App. 6 million
MAYOR TENANTS	LC Waikiki, H&M, Intersport, Springfield, Calzedonia, Sportina, Carpisa, Zlatarna Celje, Parfois, Deichmann, CCC, Tehnomanija, Lilly, dm drogerie markt, DexyCo Kids, Dreamland Playground, McDonalds, KFC, RODA

ADA MALL SHOPPING CENTER



STADION SHOPPING CENTER



BIG FASHION SHOPPING CENTER



BEO SHOPPING CENTER



LOCATION	Visnjicka Street
INVESTOR	BIG CEE
OPENING YEAR	2017
SIZE	32,000 GLA
ANNUAL FOOTFALL	6 million
MAYOR TENANTS	Inditex brands, H&M, CCC, LC Waikiki, Reserve, Idea, Cineplexx

LOCATION	Vojislava Illica Street
INVESTOR	MPC
OPENING YEAR	43,000
SIZE	2020
ANNUAL FOOTFALL	n/a
MAYOR TENANTS	Peek&Cloppenburg, H&M, Reserved, C&A, LC Waikiki, Deichmann, Lindex, Lilly, Intersport, Cineplexx, McDonalds, Starbucks

LOCATION	Umetnosti Blvd.
INVESTOR	Mercator Group
OPENING YEAR	2002
SIZE	21,400 GLA
ANNUAL FOOTFALL	App. 4.5 million
MAYOR TENANTS	LC Waikiki, Lindex, N Fashion, Intersport, Springfield, Tom Tailor, Geox, dm drogerie markt, Lisca, BebaKids, Mercator hypermarket
LOCATION	Kneza Mihaila Street
INVESTOR	ABD/Ashtron Group
OPENING YEAR	2017
SIZE	15,300 GLA
ANNUAL FOOTFALL	App. 7 million
MAYOR TENANTS	Armani Exchange, BS Sport, Intersport, Fashion&Friends, Levi's, Sportina, Timberland, Lindex, Napapirji, XYZ, Maxi, Starbucks

MERCATOR CENTER



RAJICEVA SHOPPING CENTER



PROMENADA NOVI SAD



BIG NOVI SAD



LOCATION Oslobođenja Blvd.

INVESTOR NEPI Rockcastle

OPENING YEAR 2018

SIZE 48,900 GLA

MAYOR TENANTS Inditex, Fashion&Friends, Sportina, LC Waikiki, Intersport, Tehnomanija, CCC, CineStar, McDonalds

LOCATION Sentandrejski put

INVESTOR BIG CEE

OPENING YEAR 2012-2020

SIZE 45,700 GLA

MAYOR TENANTS H&M, Inditex, LC Waikiki, Pepco, United Colors of Benetton, C&A, Intersport, dm drogerie markt, DECATHLON, CineStar, McDonalds

LOCATION	Kraljice Marije Blvd.
INVESTOR	BIG CEE
OPENING YEAR	2012
SIZE	22,000 GLA
MAYOR TENANTS	H&M, LC Waikiki, CCC, NewYorker, Idea Super, Intersport, Deichman, CineStar, McDonalds

PLAZA KRAGUJEVAC



DELTA PLANET NIS

LOCATION	Nemanjica Blvd.
INVESTOR	Delta Real Estate
OPENING YEAR	2021
SIZE	30,000 GLA
MAYOR TENANTS	Fashion&Friends, H&M, LC Waikiki, CCC, Kicks&Heelz, CineStar, McDonalds, KFC, Burrito Madre



BELGRADE HIGH- STREET



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 STREET ZONE	SIZE OF UNITS (SQ M)		
	<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	40-50	25-35	10-20
Gospodska	35-45	25-35	10-20
Modern Shopping Centers	50-70	35-50	Up to 35

Service
Health & Beauty
Fashion & Accessories
Restaurants & Cafés
Bookstores & Kids
Gallery
Electronics



Starbucks
Maison No1
Rajićeva
Shopping Center

Kalemegdan

tram line

Pariska Street

**University
of Art**

Rajićeva Street

Icebox
Watch is watch
InOut pizza
Loris
Boutique Restaurant

Kneza Mihaila Street

Kralja Petra Street

Caffe Snežana
Goethe Institut
Bookstore Laguna Delfi

Mona

Leon

Shoestar

Restoran Via Del Gusto

Bookstore Dereta

Heritage House of Belgrade

Restaurant Kolarac,

Beograd cafe

LC Waikiki

Zepter Museum and Store

Nikole Spasića Street

**Belgrade
Department
Stores**

Uskočka Street

Erste Bank

Rancco

Scandinavian Candy
Gente

Gallery ULUS

Vuka Karadžića Street

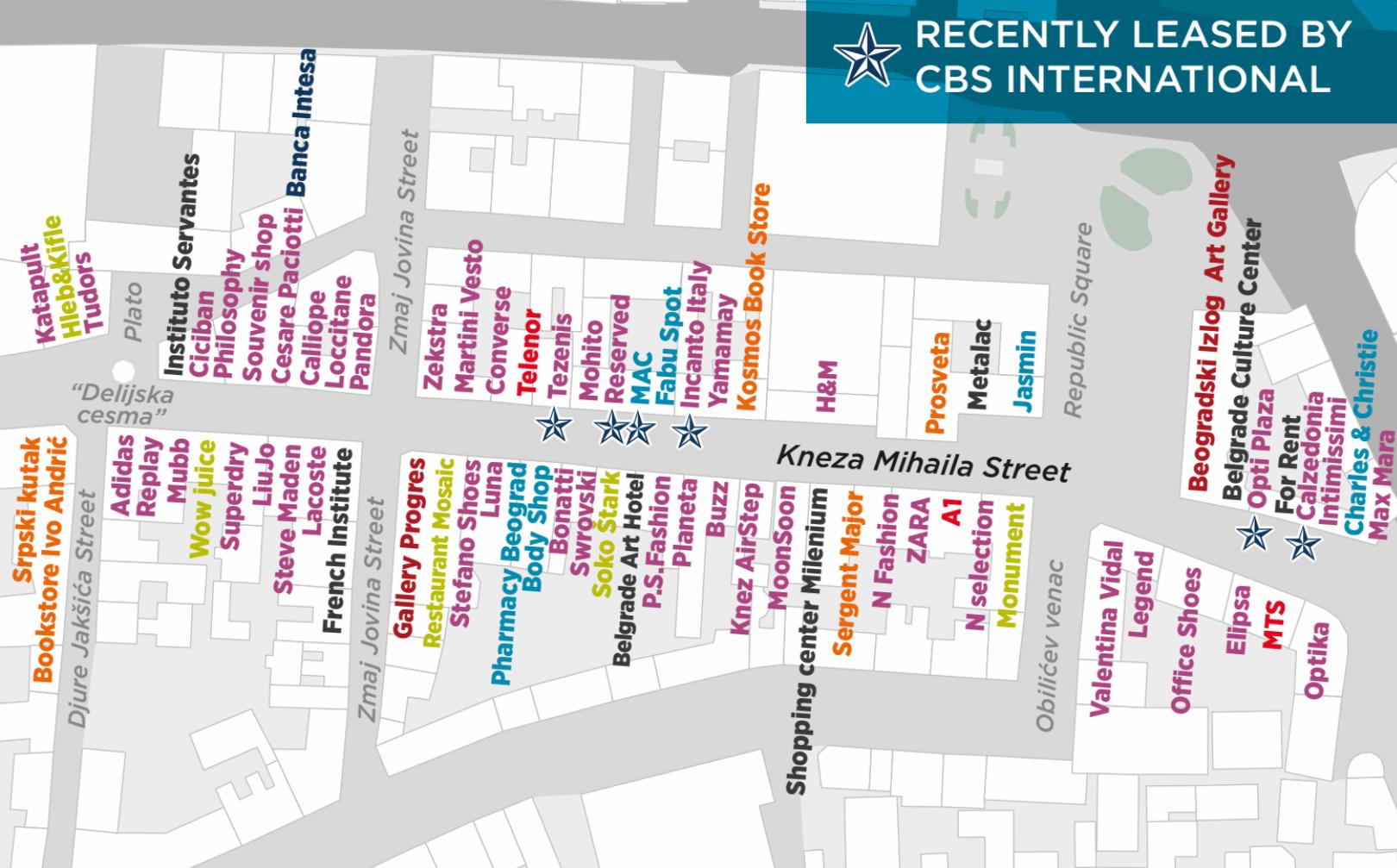
Gallery SANU

Vuka Karadžića Street

For Rent

KNEZA MIHAJLA STREET

RECENTLY LEASED BY
CBS INTERNATIONAL



TERAZIJE STREET

Gyros

Cocofil Accessories

Scandinavian Candy

Woman's Secret

Skoz dobra pekara

Planet Hair

MaxMara

Service

Health & Beauty

Fashion & Accessories

Restauranrs & Cafés

Bookstores & Kids

Gallery

Electronics

MaxBet
Big Blue

D&P

Banca Intesa
Gyros in City

Tehnomedia

Central Hostel

Jewelry Stefanović
AMC

Credit Agricole Bank

Mladost Turist

Terazije 5 Designer Store

Belgrade Pharmacy

Eurobank

McCann Office

Super WOK Asian Food

Pro Piu Grande

Negro Caffe

Belgrade Department Stores (OVS)

Knez Mihajlova Street

Sremska Street

Food Store
Mobil Shop
Tiffany

Balkan Bet

For Rent

Tehnomania

iStyle

Extreme Intimo

Diopta

Caribic Pizza

Zepter Hotel

Mona For Rent

Shoestar

Socker

OTP Bank

Balasević

Jewelry Papić

Prizrenka Street

Deichmann

Kasina Hotel
and Restaurant

Hotel
Moskva

Cafe
Moskva

Restaurant
Čajkovski

Serbian Orthodox
Church souvenirs

Panter
Exchange Office
MTS

Ogi
SSB

Cuka jewelry
Optics



Grubin
Stepland

Gradsko pivnica
Lori blu

Alfa BK Univerzitet

Siberian Health
Western Union

Restauran
Tudors

Iglu Spot
Solinac

Tudors
Sloboda Theater

Terazije Street

Burritto Madre

McDonalds

Keeks & Heel2

Bonatti

Ray Ban

Pharmacy

Ellipsa
Barbossa
BPM
Luna

Nikole Pašića Square

Komerčijalna Banka

La Manga

SS Boutique

Fly London

Obuća Pavle

ONE Concept

HAB

Prizma

Zlatarna Celje

Mila Vitsa

Partizan Shop

Univerzitet u Beogradu
Mona

Balkanska Street



WEST 65 NEW BELGRADE

DEVELOPER PSP-Farman Holding
OPENING YEAR 2021 Q4
SIZE 11,000 GLA

AVA SHOPPING PARK BELGRADE

DEVELOPER IKEA
OPENING YEAR 2022
SIZE 30,000 GLA



GO SHOP RUMA RUMA

OPENING YEAR 2022 Autumn
SIZE 12,200 GLA
NO. OF UNITS 31
PARKING PLACES 300



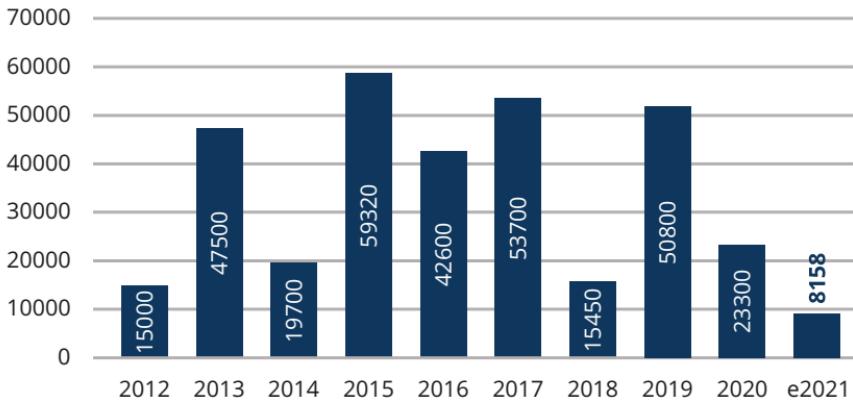
BULEVAR PARK LOZNICA LOZNICA

OPENING YEAR 2022 Q3
SIZE 7,850 GLA
NO. OF UNITS 20
PARKING PLACES 205

LANDLORDS FOCUS

- 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 2012-2021

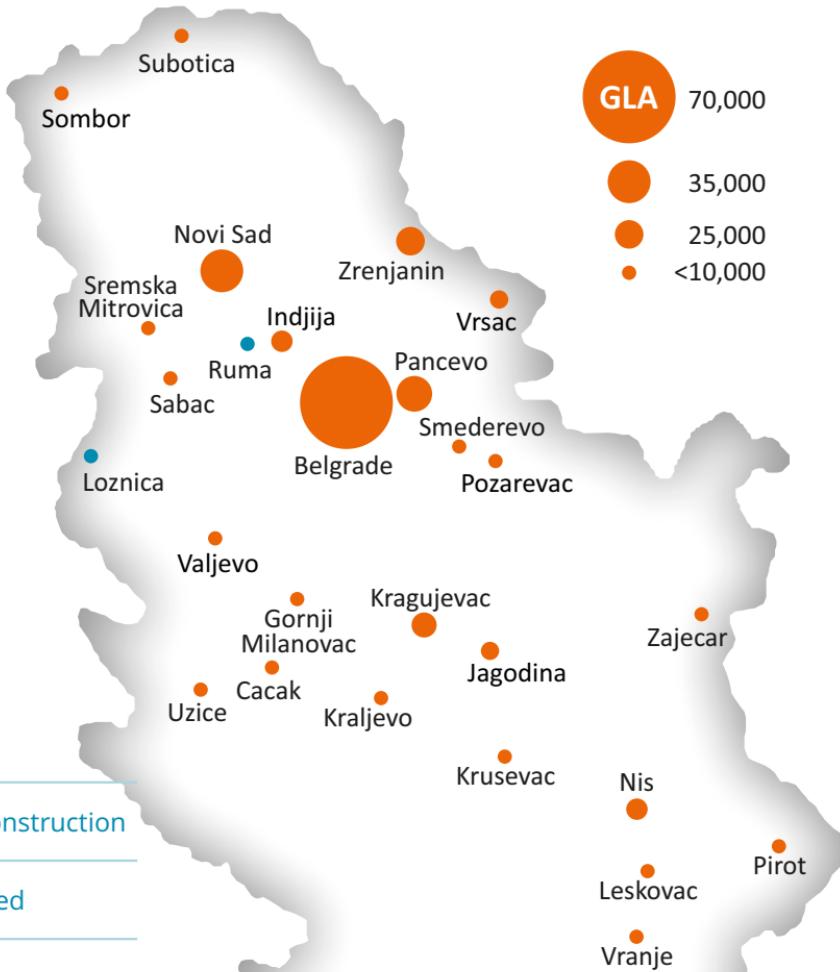


Location	Project	Size (sq m GLA)
Novi Sad	BIG NOVI SAD	45,700
Pancevo	BIG Pancevo	30,000
Zrenjanin	BIG Zrenjanin	25,500
Belgrade	BIG Rakovica	24,000
Belgrade	Zemun Park	16,000
Indija	BIG Fashion Park Indija	15,000
Kragujevac	Delta Park	14,000
Nis	Stop.Shop Nis	13,500
Belgrade	Stop.Shop Borca	13,000
Belgrade	Aviv Park Zvezdara	11,500
Jagodina	Vivo Shopping Park	10,000
Subotica	Stop.Shop Subotica	10,000
Belgrade	Stop.Shop Lazarevac	10,000
Sabac	Capitol Park Sabac	9,700

Location	Project	Size (sq m GLA)
Smederevo	Stop.Shop Smederevo	9,500
Krusevac	Krusevac Shopping Park	9,000
Vrsac	Stop.Shop Vrsac	8,250
S.Mitrovica	Stop.Shop S.Mitrovica	7,000
Pozarevac	Stop.Shop Pozarevac	7,200
Leskovac	Capitol Park Leskovac	6,500
Zajecar	Capitol Park Zajecar	6,500
Cacak	Stop.Shop Cacak	6,320
Valjevo	Stop.Shop Valjevo	6,100
Uzice	NEST Uzice	7,000
Sombor	Capitol Park Sombor	5,200
Kraljevo	NEST Kraljevo	5,000
Belgrade	BIG Fashion Park	14,800
Kraljevo	NEST Kraljevo	4,800
Vrsac	NEST Vrsac	3,000
G.Milanovac	Shop Park	7,000
Vranje	Retail park Zona	8,500
Belgrade	NEST Obrenovac	8,158
Belgrade	AVA Shopping Park (2022)	30,000
Pirot	PULS Shopping park (2021)	8,000
Loznica	Bulevar Park Loznica	9,632
Ruma	GO SHOP RUMA	12,200

Under Construction

● Planned



OCCUPIERS FOCUS



THE MOST ACTIVE INTERNATIONAL RETAILERS

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.

INDITEX



32 stores 2 cities

LC WAIKIKI



34 stores 24 cities

NEWYORKER

JYSK

DEICHMANN

McDonald's

TENDAM

GLOBAL FASHION RETAIL



35 stores 19 cities

40 stores 26 cities

34 stores 12 cities

19 stores 3 cities

35 stores 7 cities

37 stores 26 cities

THE LARGEST FRANCHISEES

FASHION COMPANY

SCOTCH & SODA

TOMMY HILFIGER

MANGO

LIU JO



Timberland



SPORTINA

A|X

ARMANI EXCHANGE



TOM TAILOR

ESPRIT

TALLY WEIJL



PARFOIS



PANDORA™

Argenta

L'OCCITANE
EN PROVENCE

NESPRESSO®

NEWCOMERS 2019-2021

WYCON
cosmetics



Kiehl's
SINCE 1851

LIU·JO

REMIXS

 PREMIUM PFT



MELI MELO
PARIS

NESPRESSO

極度乾燥(しなさい)
Superdry.

sinsay

MOHITO

 **the athlete's foot**

Peek & Cloppenburg

DECATHLON




house
CROPP
INCANTO
ITALY


CK
Calvin Klein

Dune
LONDON



ANNOUNCED

Douglas





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CROATIA RETAIL



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



- 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.
- The structure of the Croatian economy is dominated by the service sector, primarily due to the well-developed tourism, with tourism revenues usually representing nearly 20% of the country's GDP.

- All of Europe in 3 hours
- 7 airports and 2 air fields
- Pan-European Corridors (X, Vb, Vc) cross its territory
- Direct access to Rhine-Main-Danube system through four main river ports

CORRIDOR 7
 CORRIDOR 10
 CORRIDOR 5



CROATIA RETAIL MARKET

KEY FACTS - CROATIA

Population: 4.2 million

Area: 56,594 m²

Average net salary 2020: EUR 907

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.

Due to capital`s oversupply, developers` focus is on secondary cities and generally, the occupier demand is driven mostly by expansions and repositioning within older retail schemes.

CROATIA RETAIL STOCK

1,430,899 sqm GLA

Retail stock in Q3 2021

334 sq m GLA

Retail stock
per 1,000 inhabitants

ZAGREB RETAIL MARKET

KEY FACTS - ZAGREB

Population: 790,017 (2011 Census)

Modern retail stock: 536,700 GLA

Retail stock per 1,000 inhabitants: ... 679 sq m

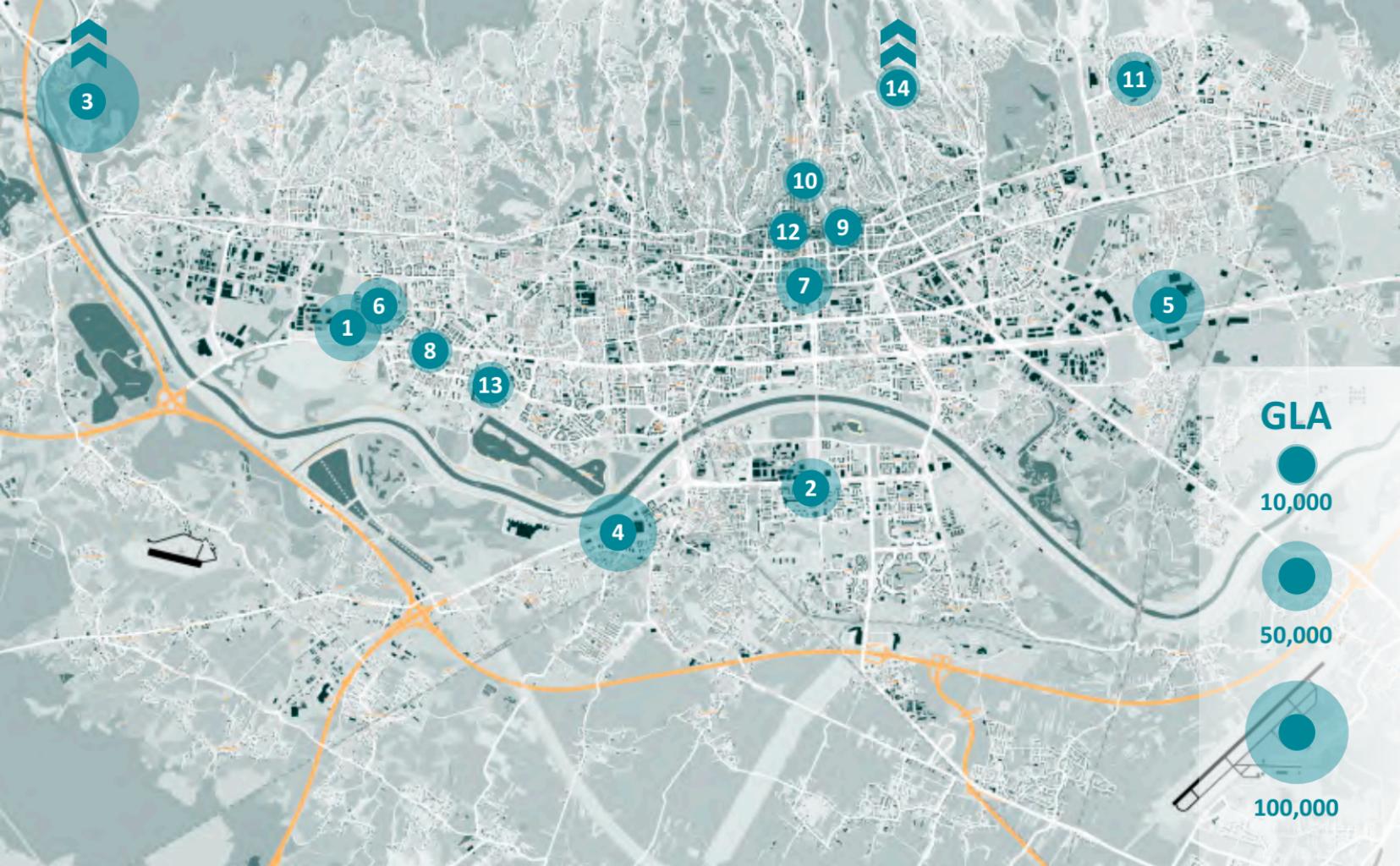
- The retail market in Zagreb is considered to be the most developed.
- With its retail stock of app. 536,700 sq m GLA is high above the average of the capital cities of the region. This has impacted in developers moving their attention towards secondary cities, especially along the Adriatic coast.
- Many are focused in repositioning and expanding the existing retail formats, baring in mind the vacancy rate in prime shopping centers is at the level of 4%.
- The rental levels currently range between EUR 19-22/sq m/month in prime shopping centres.

PRIME RETAIL YIELDS (%)

		CURRENT Q	LAST Q	LAST Y
JUNE 2021	HIGH STREET SHOPS	7.00	7.00	6.50
	RETAILPARKS	8.50	8.50	8.50
	PRIME SHOPPING CENTRES	7.25	7.25	7.00

ZAGREB SHOPPING CENTERS

RETAIL PROJECT	GLA	RETAIL TYPE	PHASE	
1 City Centar One West	46,000	Western-type shopping center	<i>Completed projects</i>	
2 Avenue Mall	34,300			
3 Westgate	100,000			
4 Arena Centar	67,260			
5 City Centar One East	53,000			
6 Z Center Zagreb	30,000			
7 Importanne Centar	31,000			
8 SC Precko	10,000			
9 Importanne Galeria	10,000			
10 Centar Kaptol	12,000			
11 Garden Mall	26,000	Neighborhood mall		
12 Centar Cvjetni	8,000			
13 Point Centar	13,500			
14 Meridijan 16	12,000			



ARENA CENTER ZAGREB



ABOUT SHOPPING CENTER

LOCATION Vice Vukova, Laniste

INVESTOR NEPI

OPENING YEAR 2010

SIZE 67,260 GLA

ANNUAL FOOTFALL 10mill

MAJOR TENANTS

FASHION Fashion&Friends, H&M, LPP brands, Inditex brands, XYZ, NewYorker, C&A, Peek&Cloppenburg

ACCESSORIZE/WATCHES Pandora, Zlatarna Celje, Mark Pjetri

SHOES Deichmann, ShoeBeDo

HEALTH & BEAUTY dm drogerie, Douglas, Muller, The Body Shop, Kiehl's

KIDS Blu Kids, Magic Baby, Froddo,

ENTERTAINMENT CineStar, Zrcalni labirint
FOOD AND BEVERAGE KFC, Burger King, Subway, McDonalds

LOCATION	Avenija Dubrovnik, Siget
INVESTOR	GTC
OPENING YEAR	2007
SIZE	34,300 GLA
ANNUAL FOOTFALL	App. 6 mill
MAYOR TENANTS	Inditex brands, H&M, LPP brands, NewYorker, Carpisa, CCC, Deichmann, Ecco, Office shoes, DM, Douglas, L`Occitane , Mueller, Ciciban, Benetton, Next, CineStar Blitz, KFC, McDonalds

AVENUE MALL ZAGREB



WESTGATE ZAGREB

LOCATION	Zapresicka, Jablanovec
INVESTOR	EKZ Zagreb
OPENING YEAR	2009
SIZE	100,000 GLA
MAYOR TENANTS	H&M, LPP brands, Sportina, Benetton, C&A, KiK, Pepco, Parfois, Deichmann, CCC, Ecco, dm drogerie, Muller, Denis Family Park, Kids World, Burger bar



CITY CENTER ONE WEST



ABOUT SHOPPING CENTER

LOCATION Jankomir, Stenjevec

INVESTOR HYPROP

OPENING YEAR 2006

SIZE 46,000 GLA

ANNUAL FOOTFALL App. 6,5 mill

MAJOR TENANTS

Armani Exchange, Inditex brands,
H&M, Fashion&Friends,
Peek&Cloppenburg, Carpisa,
Maras, Pandora, Parfois,
Swarovski, Deichmann, Humanic,
Timberland, dm drogerie, Douglas,
Muller, Kiehl's, Baby Center,
Okaidi, OVSkids, KFC, McDonalds

ABOUT SHOPPING CENTER

LOCATION	Slavonska av, Zitnjak
INVESTOR	HYPROP
CATCHMENT AREA	270,000
OPENING YEAR	2012
SIZE	53,000 GLA
ANNUAL FOOTFALL	App. 6,5 mill

MAJOR TENANTS Inditex brands, Benetton, C&A, H&M, NewYorker, Peek&Cloppenburg, Sportina, Carpisa, Pandora, Deichmann, CCC, Humanic, Muller, Douglas, dm drogerie, Baby Center, Froddo, Ciciban, Cineplexx, KFC, Burger King

CITY CENTER ONE EAST





ZAGREB HIGH- STREET

- Potential for high-street development is high and attractive high-street locations are showing increased demand from international brands.
- Rents for prime high-street locations range between EUR 35-65/sq m/month

BANA JOSIPA JELACICA SQUARE



MAP OF HIGH STREETS

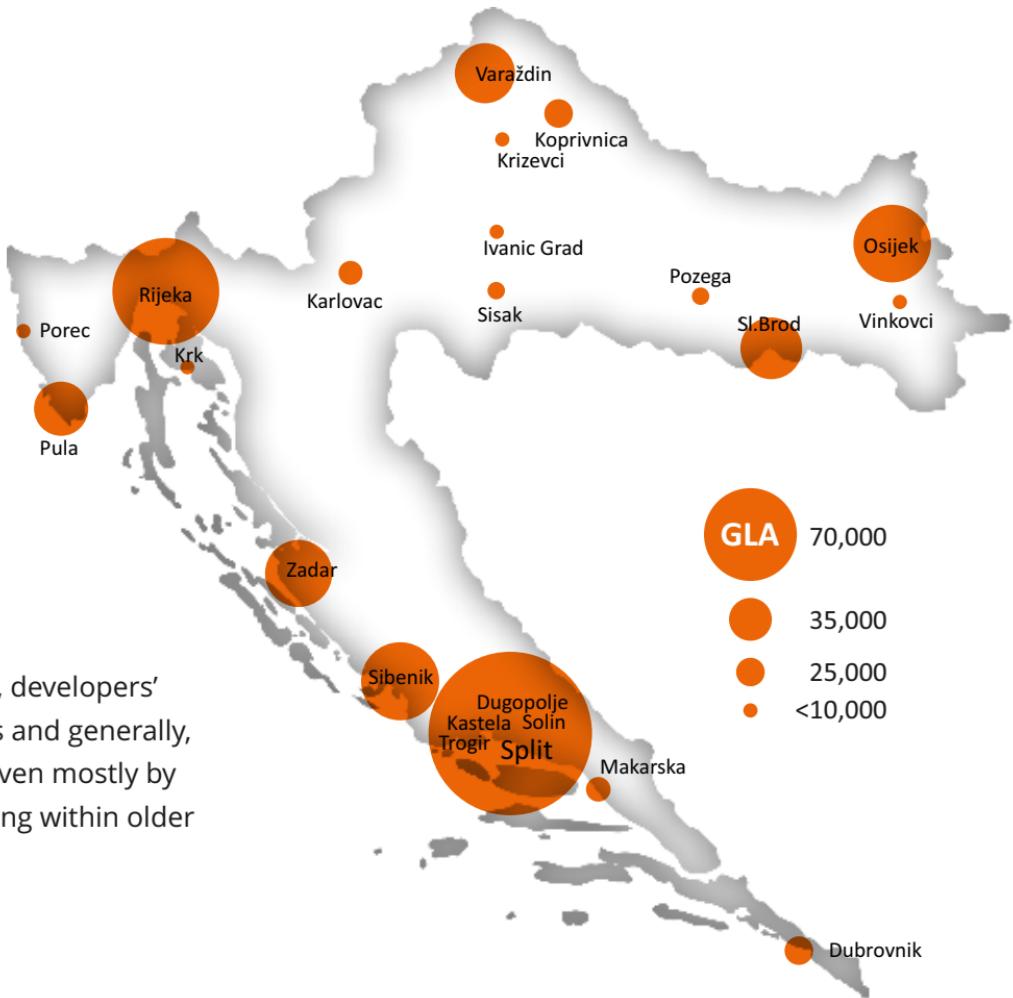


ILICA STREET



OTHER RETAIL PROJECTS

Location	Project	Size (sq m GLA)
Split	CITY CENTER ONE	68,672
Rijeka	Tower centar	62,292
Split	Mall of Split	60,700
Šibenik	Dalmare	56,000
Split	JOKER	53,000
Kaštela	TC EMMEZETA KAŠTELA	42,000
Osijek	Portanova	40,200
Zadar	SUPERNOVA	40,000
Pula	MAX CITY PULA	30,000
Osijek	Avenue Mall	26,700
Varaždin	Lumini	25,500
Rijeka	ZTC	24,000
Slavonski Brod	City Colloseum	23,176
Solin	Salona Mall	22,000
Varaždin	Shopping Park Supernova Varaždin	20,000
Koprivnica	SUPERNOVA Koprivnica	19,941
Karlovac	SUPERNOVA Karlovac	17,672
Slavonski Brod	SUPERNOVA	17,000
Makarska	Capitol Park Makarska	14,200
Pula	Pula City Mall	13,000
Dubrovnik	SubCity	12,259
Dugopolje	Top outlet park Dugopolje	12,000
Požega	Supernova Požega	11,000
Sisak	SUPERNOVA Sisak West	10,400
Trogir	Marisa	10,000



Due to capital's oversupply, developers' focus is on secondary cities and generally, the occupier demand is driven mostly by expansions and repositioning within older retail schemes.

OCCUPIERS FOCUS



THE MOST ACTIVE INTERNATIONAL RETAILERS

INDITEX



37 stores 5 cities



17 stores 9 cities



160 stores 45 cities



84 stores 34 cities

29 stores 17 cities

47 stores 36 cities

37 stores 25 cities

38 stores 16 cities

28 stores 10 cities

NEWCOMERS 2020-2021

LC Waikiki

MONA

TED BAKER[®]
LONDON

NESPRESSO

la riseria

KIKO MILANO

MANGIA
SALUMERIA ITALIANA

CAFFEFREI

ATELIER REBUL
DEPUIS 1895

THE BIGGEST FRANCHISES

FASHION COMPANY

ck
Calvin Klein

LIU-JO

TOMMY HILFIGER

GUESS

**FASHION
&FRIENDS**

UGG

GAUDÌ

DIESEL

REPLAY

SPORTINA

A|X
ARMANI EXCHANGE

Xyz

Bata

PARFOIS

T

TOM TAILOR

orsay

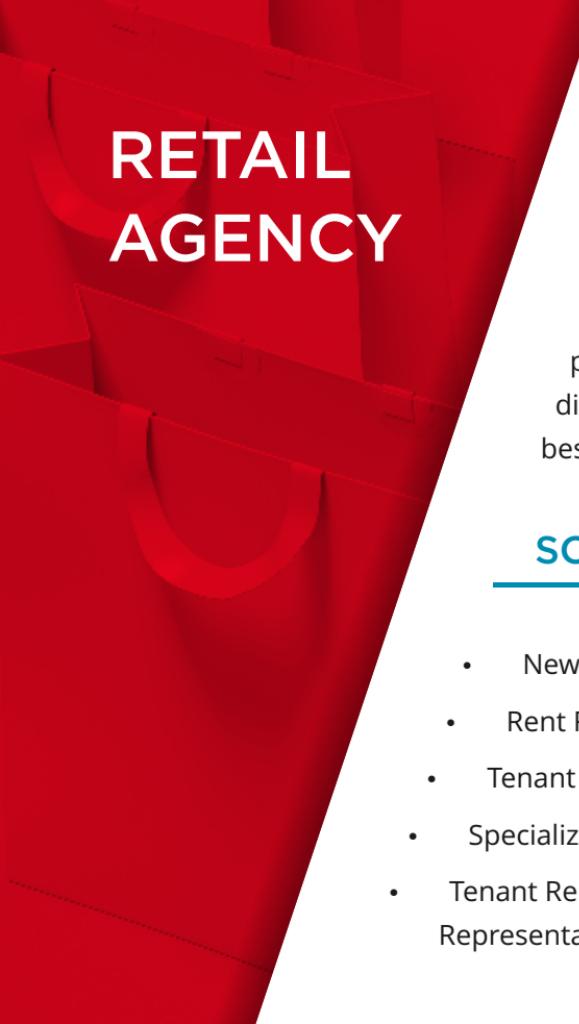


BURBERRY
LONDON

Superdry.
極度乾燥(しなさい)

FRACOMINA

JACK&JONES



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
- 8 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.



CHOICE OF CLIENTS





ABOUT US

4
COUNTRIES

120+
EMPLOYEES

14
YEARS OF
MARKET PRESENCE
IN THE REGION

1700+
CLIENTS

CBS International is a member of Cushman & Wakefield Alliance, a leading global real estate services firm, operating with 50,000 employees in more than 60 countries worldwide.

Cushman & Wakefield is among the largest commercial real estate services firms with revenue of \$7.8 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 Facilities Management
- Marketing



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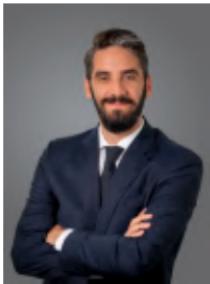
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