

AEB Real Estate Day 2017

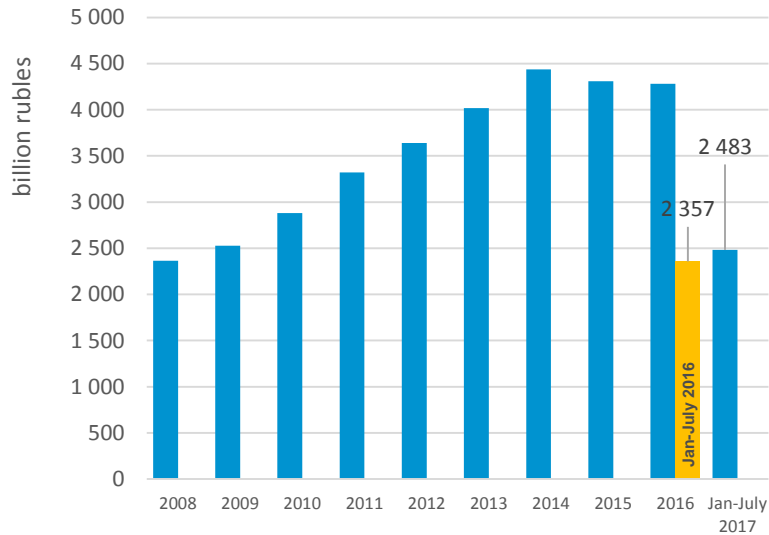
Retail Real Estate Market

September 27, 2017

Macroeconomic indicators

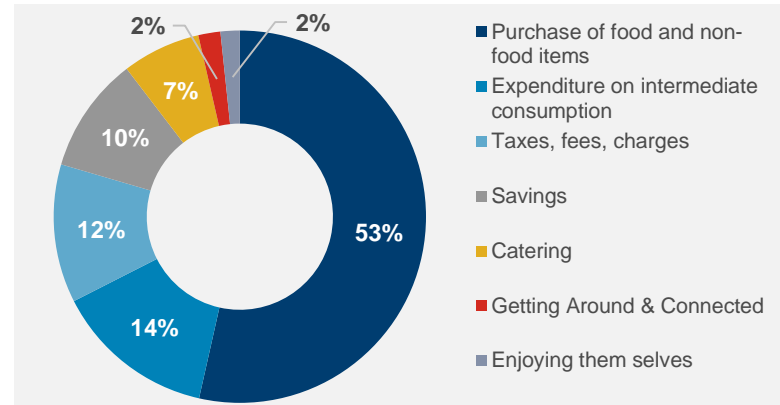
Moscow city

Retail trade turnover dynamics

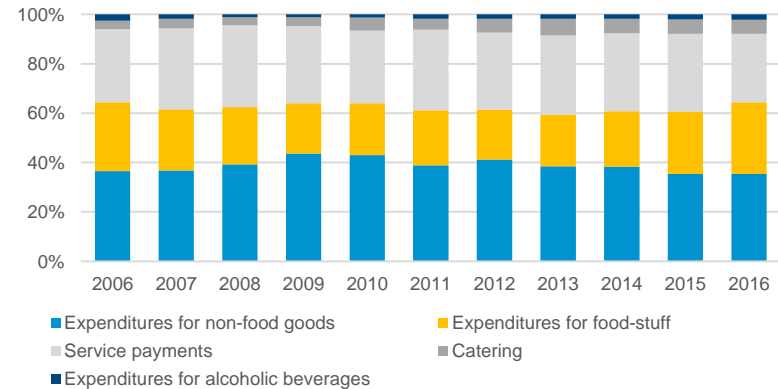


Source: Mosgorstat

Consumption expenditures structure for citizen's with Moscow average salary, 2016



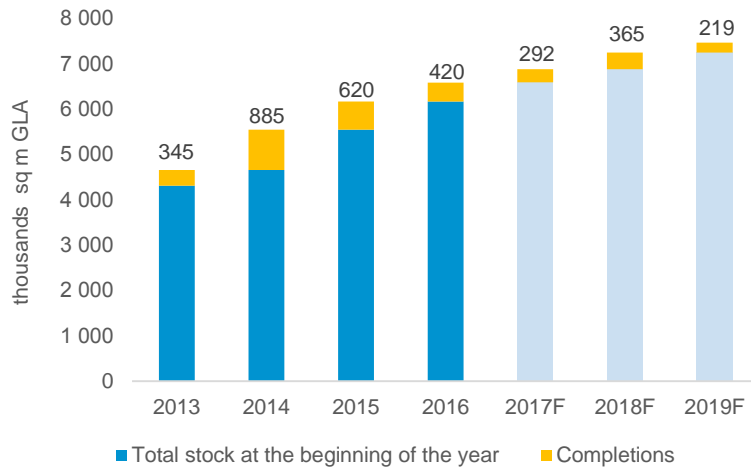
Consumption expenditures dynamics



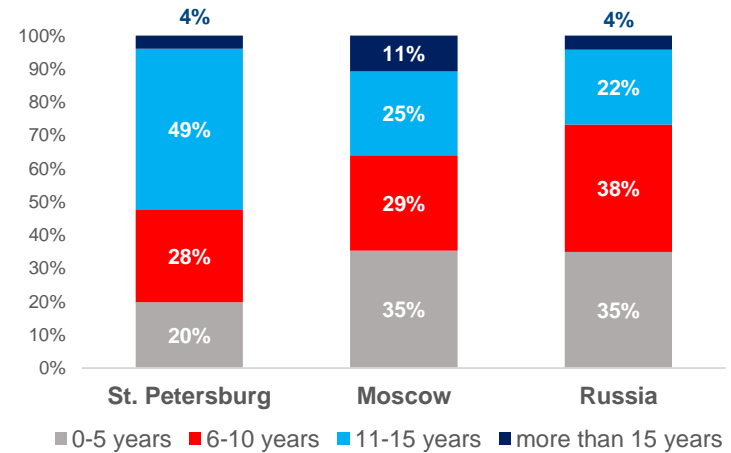
Moscow retail real estate market

Completions and age distribution

Retail completions dynamics



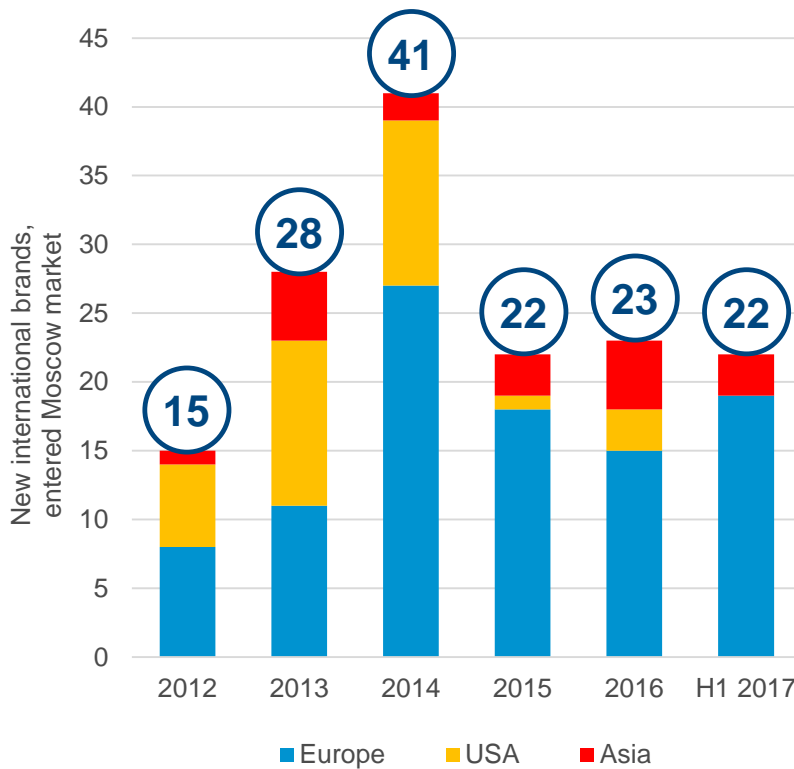
Age distribution of retail market, % of GLA



Demand

Key brands development




New international brands dynamic of openings, 2012-H1 2017



Key openings of international brands for the last 5 years



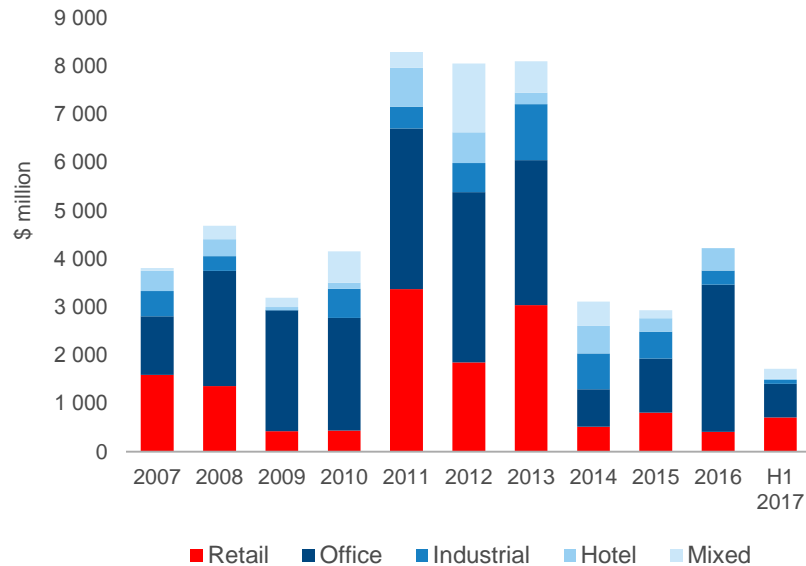
Retail market trends

	CONSUMERS 	RETAILERS 	DEVELOPERS / OWNERS 
New consumer behavior	<ul style="list-style-type: none"> › The best price › Convenient shopping › Conscious choice 	<ul style="list-style-type: none"> › Sales › Omnichannel › New technologies › Individual customer service 	<ul style="list-style-type: none"> › Concept development according to new customers habits › SMM
Shopping centers getting old	<ul style="list-style-type: none"> › Fast growth of e-commerce › SEC as a place for leisure and communications 	<ul style="list-style-type: none"> › Stores formats optimization, the revision of products range and market positioning › Reconstruction of outdated stores 	<ul style="list-style-type: none"> › Reconception › Extension of catering zones, entertainment and service sector › Attraction of unique tenants
City Programs “My street” and renovation of dilapidated housing	-	<ul style="list-style-type: none"> › Change of tenant-mix structure at the key central retail corridors 	<ul style="list-style-type: none"> › Retail infrastructure at the new residential areas › Neighborhood shopping center – convenient shopping in a walking distance

Investments in retail

Retail investments share and key deals

Investments distribution by sector



Key investment transactions, 2016-2017



SEC LETO

STATUS – **Sold**
GBA – **116,000 sq m**
PURCHASER – **MALLTECH**



SEC Columbus

STATUS – **Sold**
GBA – **277,000 sq m**
PURCHASER – **Sergey Gordeev**



SC NEVSKY CENTRE

STATUS – **For sale**
GBA – **91,000 sq m**

COLLIERS INTERNATIONAL

Moscow
10 Presnenskaya Embankment
BC Naberezhnaya Tower, Block C, 52 Floor
123112 Moscow, Russia
+7 495 258 51 51

www.colliers.ru

