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# PREVIEW

29 November – 1 December 2022  
Palais des Festivals, Cannes, France

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the new Retail Village



## SUSTAINABILITY

Antoine Frey on the need for a  
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## 2022 Topic of the year

# People, Planet, Profit: Navigating retail towards a more “human” world





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# Dear friends, participants and partners

Francesco Pupillo,  
MAPIC Markets Director

WELCOME to the MAPIC & LeisurUp Preview for this, MAPIC's 27th edition, taking place at the end of November in Cannes where we expect 6,000 participants to take part. As the leading international retail property event, we feel very excited to bring the retail, leisure and food communities together again.

This is our first full MAPIC since the pandemic — featuring both the major European players and those from around the world, including North America, Asia and the Middle East — and it is also my first Cannes event as MAPIC markets director after working alongside my wonderful colleague Nathalie Depetro for the last few years.

Of course, nothing ever stays the same. And while we always strive to keep the best of MAPIC and what has made it the key event in the international retail real estate diary since 1995, we have also constantly evolved to embrace the transformation of our industries.

As such, we are giving the floor to new players at the heart of this transformation and will help guide the market players in identifying the most suitable solutions and partners. Thus, for the second year we will include LeisurUp and The Hapetite Forum as part of our all-inclusive MAPIC offer, putting the leisure and food communities centre stage. You will also be able to visit the MAPIC Innovation Forum and its immersive Retailtech Lab, showcasing new retail tech solutions to help your business.

More than ever, collaboration is crucial to rethink the industry and to build new business models and we have created six premium, invitation-only events covering specific sectors: the Outlet Summit, Sustainability Workshop, Legal Forum, Cities Summit, Multi-unit & Master Franchise Summit, and the Leisure Workshop.

I am also delighted to say that the MAPIC Awards are back, with a gala dinner for 300, set to recognise the best of the best across retail, leisure, F&B and development.

This year our main conference theme is People, Planet and Profit: Navigating retail towards a more 'human' world and MAPIC will put the human and environmental transformation at the centre of debates. New ESG criteria aims to make our world a better place to live, generating great opportunities for industry players to adapt their business and operational models.

Indeed, sustainability will be at the heart of the event and we have made our own pledges to make this the most sustainable MAPIC ever, building up a sustainability charter, with a promise to keep learning and improving every year.

This will also be the year of the retailer and you can meet with the players redefining the retail landscape within the new Retail Village, showcasing emerging retailers, marketplaces, digitally-native vertical brands (DNVBs) and new ethical concepts.

In fact, we expect over 1,500 retailers to attend, including a host of DNVBs as they increasingly seek physical space to promote their brands alongside their on-line channels.

As you will read in this Preview, there really is only one place to be from November 29 to December 1 as we prepare to welcome the entire industry to Cannes.

Thank you for being part of the MAPIC & LeisurUp community. From the bottom of my heart and from the whole MAPIC team, we wish you a fantastic show!

## DIRECTOR OF PUBLICATIONS

Michel Filzi **EDITORIAL**

**DEPARTMENT:** Editor in Chief: Mark

Faithfull Sub Editor: Julian Newby;

Proof reader: Debbie Lincoln;

Editorial Management: Boutique

Editions; Contributors: Ben Cooper,

Liz Morrell, Ben Sillitoe; Graphic

Studio: studioA Design; Graphic

designers: Sunnie Newby and

Harriet Palmer **PRODUCTION**

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Martin Screpel; Publishing

Manager: Amrane Lamiri; Printer:

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## MAPIC PREVIEW | CONTENTS

### 9 The world gets back to business

MAPIC's exhibitions, conferences, and meet-ups: Milan, Mumbai, Madrid, London and Paris

### 11 We need to look at retail again

MAPIC 2022 will be based on six key pillars as the event evolves for a new consumer generation

### 17 What's happening in Cannes this year?

From new zones such as the Retail Village, to premium networking sessions, workshops and pitching sessions

### 19 Your MAPIC

French players at MAPIC | MAPIC Awards | Premium networking events | The Happetite forum | Retail Village

### 20 Real estate activity continues across France despite economic uncertainty

French retail real estate players will be in attendance in force at MAPIC

### 23 The MAPIC Awards are back

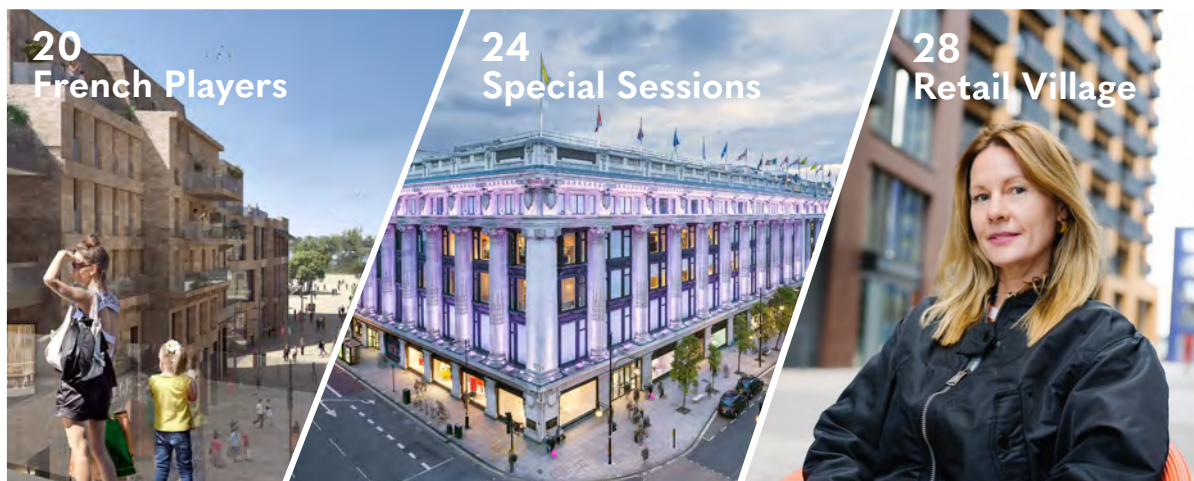
The MAPIC Awards will once again be hosted in Cannes during a gala ceremony

### 27 The Happetite Forum: F&B's new recipe for success

News and views from new players will dominate the conference sessions at this year's Happetite Forum

### 28 A new generation of mould-breaking brands on show at the Retail Village

New to MAPIC this year is a Retail Village featuring innovative retail players and DNVBs







## 35 Six key pillars for MAPIC 2022

Retail | Leisure | F&B | Sustainability | Mixed use | Innovation

## 37 Retailers show optimism in a difficult market

Post-pandemic, the retail industry is facing further economic challenges but a resilient sector is well prepared

## 43 Leisure and retail join forces in the post-pandemic world

LeisurUp will once again be the focus for attendees looking to learn more about the role of leisure in lifestyle destinations

## 49 F&B gets creative as it emerges from the pandemic

The food & beverage market has had to learn how to adjust and adapt, with the Hapetite forum introducing new names

## 55 Sustainability has to start at the top

Why sustainable thinking is becoming increasingly embedded across the real estate and retail industries

## 61 European projects offer a glimpse to the future of retail real estate

With mixed use driving the development and redevelopment of urban locations, we look at some of the major projects

## 67 From the mall to the metaverse: tech takes the lead in Cannes

The MAPIC Innovation Forum and Retailtech Lab will be at the centre of MAPIC's innovation showcase





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# ITALY AT MAPIC 2022: JOIN US ON STAGE!

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in the Italian market

November 29<sup>th</sup> - December 1<sup>st</sup>  
2022

Palais des Festivals  
Cannes

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extraordinary: be 



P-1.L 2

P-1.M 1



# The world gets back to business

With events opening up again around the world, MAPIC has already held two major exhibitions and conferences, plus informal networking meetings in Milan, Mumbai, London, Madrid and Paris ahead of the main Cannes event ●

## ITALY

THE SIXTH edition of MAPIC Italy recorded 30% more delegates compared with 2021 at over 1,700, with around 550 retailers and restaurant chains in attendance at Milan Superstudio Maxi, in May.

“The numbers are not random,” CNCC president Roberto Zoia said. “MAPIC Italy exists because there is a very cohesive industry in Italy that is able to promote, participate and work actively on events of such importance.” The guiding theme in Milan was People, Planet, Profit: Navigating Retail Towards a More Human World, with highlights over the two days including the presentation of To Dream – which will open in Turin by 2024 – and the CNCC conference.

## INDIA

RX INDIA organised MAPIC India, which took place in September at the JIO World Convention Centre, Mumbai. Now in its 18th year — originally launched as India Retail Forum in 2004 — the event is India’s premier annual gathering where retail brands learn, grow, shop and experience the future of retail and retail real estate in one of the world’s most dynamic markets, as India rises from the shadows

of the pandemic. The two-day event featured a series of knowledge-led sessions, followed by an awards ceremony. RX India welcomed nearly 1,300 attendees for the event.

## UK

In July, MAPIC officially launched in the UK on the hottest day of the year at the offices of Landsec in London, as MAPIC director Francesco Pupillo welcomed guests and outlined new initiatives for 2022. “We are reinventing MAPIC for the click-and-mortar era,” Pupillo said. He highlighted the new retail village, retail conference, pitching and franchise content in Cannes and the UK Pavilion in partnership with Revo. Nick Porter, head of brand at Landsec, said that the UK developer and landlord will have its biggest presence at MAPIC “in many years” and said that the company is focused on its “succeeding together” strategy, working together with retailers and brands to create “experiences not found at home.” Kirsten Wood, chief marketing officer at Situ Live, described the company’s store at Westfield White City, which offers lifestyle sets in a multi-brand environment. In all, eight brands co-exist, with the space including a kitchen and in-house chef. Products are not availa-



MAPIC Paris



MAPIC London



MAPIC Spain



MAPIC Italy



MAPIC India

ble to buy in-store, but customers can scan QR codes.

“A big part of the offer is the staff, who are influencers in their own right and who are encouraged to use quiet times to post to their socials and create content,” Ward said.

## FRANCE

The MAPIC launch cocktail was held at the Philanthrolab terrace in Paris, facing Notre-Dame. Welcomed by Compagnie de Phalbourg CEO Philippe Journo and MAPIC director Francesco Pupillo, nearly 50 representatives of brands and real estate companies gathered to hear from both; Chris Igwe of Chris Igwe International chaired the session.

## SPAIN

Attendees at a cocktail networking event sponsored by Carto and Sensoromatic at the offices of Hogan Lovells, Madrid joined a panel of speakers in September. Hosted by Emilio Gomez, partner at Hogan Lovells, and moderated by Marta Renones, director, Just Retail News, the panel included Jose Manuel Llovet, president of APRES-CO, Carlos Vila, expansion director of Mango, and Jose Luis Pastor, CEO and co-founder of Rethink.





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F&B Outlets

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**VENTURA  
MALL**

DAMAC HILLS



Eurofund acquired Silverburn, Aberdeen, earlier this year



# 'We need to look at retail again'

MAPIC's evolution from a retail real estate event into a much broader industry gathering will be reflected more strongly than ever before in 2022, with six key pillars focused on retail, food & beverage (F&B), leisure, sustainability, property and innovation.

## Sustainability

From the huge rise in second-hand fashion and a focus on waste reduction to ethical sourcing and greater community engagement, operators, developers, investors and new concepts all have a responsibility to have a positive impact.

## The rise of mixed use

Mixed use has become the dominant development platform, where destinations create a sense of place and community. This is a very important area for cities, so MAPIC will be emphasising the way that these new types of schemes

can enhance and define towns and cities. MAPIC will also focus on the evolution of designer outlets and out-of-town retail parks.

## New retail

A new generation of retailers, many of whom started life online, are redefining the retail landscape. From the optimisation of social media to fresh approaches to in-store and omni-channel retailing, digital-native vertical brands (DNVBs), fast-delivery specialists and marketplaces will be at MAPIC. Once again there will be a focus on master-franchises and licencing.

## Leisure

LeisurUp is a complementary event, which reflects the growing popularity and diversification of the leisure sector, from VR and AR to competitive socialising and major themed attractions. For

MAPIC 2022 comes at a time when the pandemic lockdowns are over but war in Europe and the soaring consumer cost of living in many countries across the world bring new challenges.

**Mark Faithfull** looks at the retail and real estate background to this year's event ●

retail, leisure is an increasingly important opportunity, adding to the brand experience with stores and licencing.

## Food

The huge expansion of food and beverage (F&B) operators, reflecting global tastes and different lifestyles, has seen the F&B industry boom in recent years. MAPIC's food forum, The Happtite, will once again showcase the best F&B has to offer, examine new business models, the rise of dark kitchens and delivery, and highlight innovation in areas such as reducing food waste, plus private equity opportunities.

## Innovation

MAPIC has increasingly reflected the introduction of digital innovation into retail and destinations with innovations that help the industry to better understand and to serve cus-

tomers, from new retailers and new uses through to how technology and innovation is used within stores.

With a fresh set of challenges facing all the industries at MAPIC, once again obituaries are being written about store-based retail and yet some of the world's biggest retail groups have been bucking that narrative. From US sportswear giant Nike opening its first Rise urban format store in the EMEA at Westfield London, to Toys 'R Us planning an "unprecedented" global roll-out according to Yehuda Shmidman, founder, chairman & CEO of new owner WHPP Global, many established players remain committed to physical retail. Similarly, online-only brands have continued to push into physical retail, opening pop-ups, brand-experience stores and, increasingly, committing to limited roll-outs. The future, it seems, refuses to





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*Promote all our Members in  
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fit into neat boxes.

Despite the challenges, as the latest update from advisor Cushman & Wakefield reveals, leasing market conditions on the high street continued to improve in Q2 2022, with prime rents rising by an average of 0.6% across Europe. On an annual basis rents were just 0.5% lower, compared with -7.5% a year earlier.

Yields were broadly flat with the European prime high-street yield averaging 4.17%, compared with 4.18% the previous quarter. Most markets (31 out of 38 tracked) saw no movement in yields over the quarter, with compression largely restricted to specific locations in Sweden and the UK.

Indeed, Eurofund Group, traditionally active in Spain and Italy but more recently the acquirer of former Hamersson scheme Silverburn, Glasgow, notes increased interest in the UK market.

"People saw our acquisition of Silverburn, the acquisition by Ardent at Touchwood, Solihull and Landsec's increased investment in Bluewater and they said, 'the market's back,'" Eurofund president Ian Sandford says. "They are not wrong. But a lot of it is about the execution because it's about a lot of micro-management. Many investors really want to buy something and let it look

after itself, which is not going to happen any longer."

An increase in European investment might have happened already, were it not for Russia's invasion of Ukraine, says Eric Decouvelaere, head of retail operator division, CBRE Investment Management.

"We need to look at retail again," he says. "But we don't buy retail as an asset class. We buy assets. It's very important to make this point because we know that a lot of retail footprint is becoming redundant and available for repurpose. What we have now [remaining retail space] is quite simple, because a lot of the irrelevant footprint is gone."

Away from shopping centres, investment fund giant Nuveen's focus is on grocery-anchored convenience — "internet proof, but internet friendly" — which continues to meet a need for shoppers and where rents are often more affordable.

These schemes and retail parks are easier to manage, says Steve Wickes, head of UK and Nordics retail, Nuveen. "You may have six to 10 occupiers on a park, the covenant risk is low and you can add something like a Starbucks, which adds to the appeal of the asset."

Roberto Zoia, IGD SIIQ director of asset management, development and

.....

**"In the last six months in the UK, the deals involving neighbourhood centres have basically tripled"**

Roberto Zoia,  
IGD SIIQ

.....

network management, also points to the "preference for proximity" and adds that there is a lot of appetite for deals involving supermarkets and retail parks.

"In the last six months in the UK, the deals involving neighbourhood centres have basically tripled," he says, noting also that rising energy costs and petrol prices are limiting the number of shopping expeditions families are making, which again favours local centres.

"IGD is responding to the new trends by being a careful retail strategist which is why we have been quick to adjust our tenant mix," Zoia says.

Also attracted to grocery, this summer Pradera acquired two Eroski hypermarket assets on behalf of German pension fund Nordrheinische Arzteversorgung (NAEV), whose real estate fund is administered by Universal-Investment Luxembourg. The acquisitions will be added to six existing assets to create an eight-asset, €200m portfolio in northern Spain.

"The acquisition is part of a European long-income, grocery-focused investment strategy on behalf of NAEV," fund director at Pradera Peter Davies says. "We believe this sector of the retail property investment market offers strong fundamentals, particularly in such uncertain times."



# The Ellinikon

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THE ELLINIKON



# Riviera Galleria



## The exquisite world of Riviera Galleria at The Ellinikon

Introducing the ultimate destination in luxury, fashion and leisure, at Athens' most stunning seafront location. With over 20,000 sq m of deluxe shopping, exceptional dining and first-class entertainment space, the most premium retail scene in Greece will become the jewel of the Athenian Riviera, attracting visitors from all over the world.

The famous and award-winning Japanese architect Kengo Kuma has created an architectural landmark inspired by the waves of the Greek sea.

Riviera Galleria will be located at The Ellinikon, the world-leading urban regeneration development that emerges in Greece and will host world-leading fashion brands, some of them with their first-ever flagship stores in Greece. Everything from must-have emerging brands to international couture houses will be included in Riviera Galleria's vibrant shopping scene.

In addition, the verandas and first-floor terraces will reveal award-winning restaurants, concept dining, elegant bistros and sophisticated cocktail bars. The visitors will enjoy a spectacular gastronomic experience with an unin-

errupted view over the marina to the open sea. Riviera Galleria revolutionises the world of retail with high-end events, pop-ups and exhibitions. The warm climate inspires superb experiences all year round, including fashion shows, concerts, art exhibitions and more.

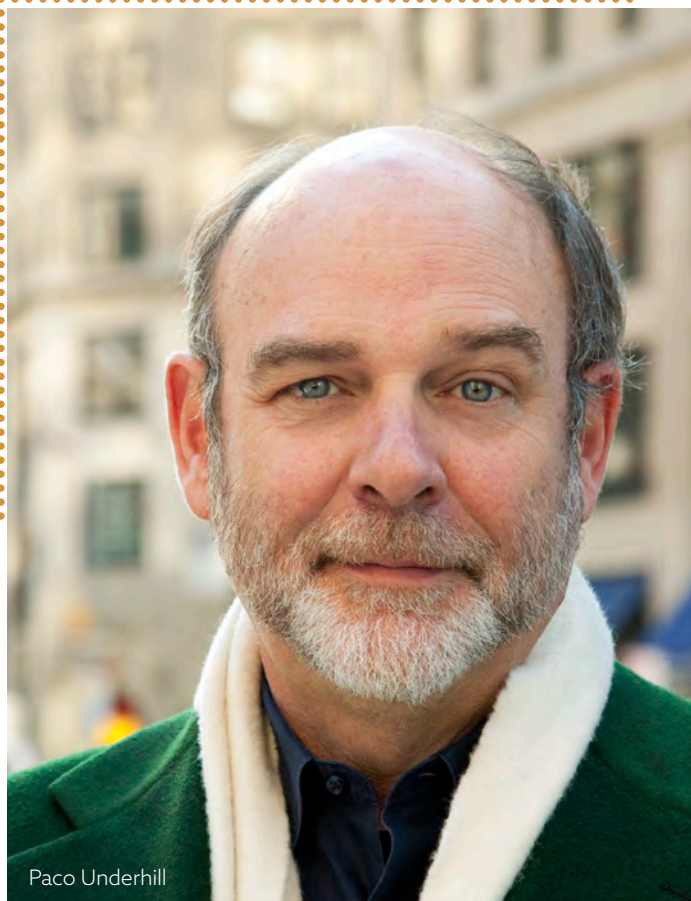
A high-end ecosystem will be created around Riviera Galleria, stretching along 3.5 km of premium coastline and beaches. The coastal front will include a variety of developments, from the luxury residential tower right by the water, Riviera Tower, exceptional beachfront residences and two prime hotels to a 310-berth high-end marina, with capacity for mega-yachts and the first Integrated Resort Casino in the country. The Ellinikon will become a legacy project for Greece and an exciting new chapter for Athens' famous coastline.





# Why everything you learned about retail is wrong

MAPIC and The Happetite Forum keynote speaker Paco Underhill wants you to rip up the rule book on dwell time, space allocation, how you view your customer needs and where you put the milk. He walks **Mark Faithfull** through the new retail reality and why it's time to change ●



Paco Underhill

PACO Underhill doesn't like decision-making sitting down. All the best ideas come standing up, ideally while walking, he says. And in the case of shopping centres, by walking the mall and understanding what's really going on.

Previewing his two keynote sessions, in partnership with ECE Marketplaces — one on retailing and consumer behaviour, the other aligned to his recent book, *How We Eat* — Underhill repeatedly comes back to the same thing, that the maxims by which much of retail works are based on an outdated and often disconnected model.

He breaks this down into six areas and while our three-way conversation between Connecticut, London and Hamburg, where Jonathan Doughty, director, special projects, ECE, resides, travels in anything but a straight line, once our time is up we've covered all six bases, plus a lot more besides.

Underhill warms to his subject by reflecting on access to information and the influence of screens and the connection between our eyes and brains. "How you see at 25-years-of-age and 55 is dif-

ferent, and yet designers are normally under 30," he says.

Secondly, we turn to gender. "Traditional gender roles are no longer true," Underhill says. "The dividing line is much fuzzier and we need to think about how different genders buy, because women tend to buy for the family and others, men typically buy for themselves."

Then he talks generational differences and the dichotomy between the buying decisions of young and older consumers, notably, says Underhill, that these are 80% cemented by the time shoppers reach 55. That means brands need to figure out a way to attract new, less opinionated younger shoppers while retaining their older customers.

Four is perhaps the biggest step away from accepted norms, as Underhill warns that stores and shopping centres need to be far more sensitive to time and how much each individual shopper wishes to give up. "You can recognise from the way someone walks in, how quickly their internal clock is ticking," he says.

That means dwell is no longer the goal and stores and malls "designed to hold

.....  
**"Retailers and brands need to figure out a way of educating their customers"**

Paco Underhill

.....

**Paco Underhill will speak twice at MAPIC:**

**Tuesday, November 29**

**10.00:** The Science Of Shopping In A Post Pandemic World, moderator Jonathan Doughty, ECE Marketplaces

**Wednesday, November 30**

**10.00:** We Are What We Eat, moderator Jonathan Doughty, ECE Marketplaces

people for as long as possible" need an "accommodation" recognising this. This, he stresses, means an "evolution from mall to all" that leaves 20th-century thinking behind.

Fifth, Underhill believes that there is a need for a disentanglement of "what's global and what's local", which is equally appropriate for retail and food and proposes that what's on offer is far more tailored to location than at present.

Concluding, Underhill questions the traditional assumptions of "where the money lies" and points out that the vast majority of the super-rich made their wealth within their own lifetimes. "Affluence is not the preserve of the aristocracy any longer," he says. "So retailers and brands need to figure out a way of educating their customers on the difference between products and price points."

All this and more will be discussed by Underhill at two sessions at MAPIC and to read more from his interview, his opinions on the food and beverage sector and the views of ECE's Jonathan Doughty, head over to MAPIC's content website [www.beyondretailindustry.com](http://www.beyondretailindustry.com)



Global players such as MAF are back at MAPIC



# What's happening in Cannes this year?

From new zones such as the Retail Village to premium networking sessions, MAPIC 2022 has a host of features plus an extensive conference and workshop programme for attendees. **Mark Faithfull** picks out just a few highlights for visitors ●

MAPIC returns to Cannes at the end of November with a packed schedule of conference sessions, workshops, networking events and retail, leisure and F&B zones and content dedicated to leisure, food and beverage, sustainability, retail, innovation and more. There will also be six premium networking events throughout the three days in Cannes.

France and Italy will be among the highest-attending nations, while global players from the Middle East, Asia and the US will be back now that travel restrictions have ended.

## France at MAPIC

French retailers, real estate developers, leisure and F&B operators and inno-

vators will have a significant presence in Cannes once again this year. The French market will be high on the agenda (see our spotlight on French players, page 20), with MAPIC helping visitors to find the right international partners and solutions. Not to be missed is the MAPIC French Forum on November 30, where delegates can attend sessions on shaping a sustainable future and a deep dive into the French leisure market.

French developers are also active internationally and MAPIC sponsor Nhood is working with Ceetrus Italy on Merlata Bloom Milano, a major mixed-use project located in Arexpo, an evolving area of Milan. The project across 70,000 sq m will offer a mix of

brand and experimental stores: 150 "experiential shopping spaces", five food areas, 10,000 sq m of entertainment and culture, plus 20,000 sq m dedicated to an urban farm.

## Italy at MAPIC

Italian companies will once again have a major presence at Cannes, with MAPIC Italy already successfully taking place in Milan earlier this year. The ITA is backing Italian businesses once again, supporting an Italian pavilion at MAPIC, along with real estate and retail organisations CNCC and Confimprese, which will once again be presenting Italian players, while outlet specialist Arcus Real Estate and Scalo Milano will be among those at the event.



Svicom at MAPIC Italy



Meanwhile, Svicom recently formalised its transition to Societa Benefit (BCorp) as the company evolves from a retail real estate consultancy towards a digital transition focus as more of a proptech firm.

Svicom chair Fabio Porreca says: "The company wants to grow in a sustainable and inclusive way. We have adapted the corporate structure to the new growth strategy."

In addition, Dils is increasingly focused on mixed use and urban regeneration leasing and recent projects include the opening of optician Fielmann's third store in Milan, just a few steps from the city's Duomo in Via Torino; and acting as advisor to Hines Italy for the letting of House of EL&N London, which opened its first Italian flagship store of about 450 sq m in The Liberty Tower in Piazza del Liberty, Milan.

## Global players return to MAPIC

With travel largely open again, global players are back at MAPIC for 2022 and developers from the Middle East and North America will be in Cannes,

including Majid Al Futtaim (MAF), which, in alignment with the UAE government's national strategic net-zero targets, is targeting being net-positive in carbon by 2040.

This year MAF secured a €1.5bn sustainability-linked loan (SLL), dependent on measurable improvements on specific yearly targets that seek to positively impact people and the planet. The Avenues, Kuwait will also be at MAPIC, having recently welcomed a new Lego store operated by MAF. The 12 district mall houses around 1,100 stores and opened in 2007.

Meanwhile, Saudi lifestyle shopping-centre developer Arabian Centres has signed a lease agreement for the development of a shopping mall, Jawharat Al-Khobar, being set up at an investment of between €265-€345m.

To be developed on a 300,000sq m site in the Saudi city, Jawharat Al Khobar open its doors in early 2026.

The Middle East Council of Shopping Centres will also be at MAPIC, as will Al Futtaim and Sahara Centre from the UAE and Kaysan Ayakkari from Turkey. From North America, outlet leasing

specialist TORG and US investment giant Brookfield, which owns nearly 180 retail locations, predominantly in the US, will also be in Cannes.

## Conferences, speed pitching and workshops

As ever, a packed conference schedule will run alongside the exhibition at MAPIC. US retail guru Paco Underhill will be speaking twice in separate keynotes on retail and food and beverage, organised in collaboration with ECE (see interview page 15).

There are six premium networking events, plus forums dedicated to France and Italy.

A few others to mention from a huge list of speakers and panelists include: Alexandra von Grun of Adidas; Ruth McFetridge of UK-based developer Landsec; Vincent Bryant of innovator Deepki; Sara Lukas from Grosvenor; Philippe Journo of La Compagnie de Phalsbourg; Lucie Basch from food waste app Too Good to Go; Timberland's Giorgio d'Aprile; Angus Booth from Action; Antoine Frey of Frey; plus from Sandbox, Sebastien Borget, COO and co-founder.



MAPIC sponsor Nhood is promoting Merlata Bloom

Read more about LeisurUp by MAPIC on page 43.

The second edition of LeisurUp will focus on the importance of human interaction and experience within physical places, identifying and selecting the best leisure solutions and partners to create exciting lifestyle destinations.

Highlights include: six dedicated sessions on the latest trends; an invitation-only leisure workshop and networking event bringing together decision-makers from the leisure, the retail and property industries; plus two leisure pitching sessions with each company having five minutes.

Read more about the Retailtech Lab on page 67.

Join an immersive and experiential Lab in the MAPIC Innovation Forum at Riviera 7, presenting the latest technologies at every step of the customer journey to bring retail forward. Partner: My Global Village



Merlata Bloom, Milan



# Your MAPIC

MAPIC 2022 will introduce a host of new features, fresh priorities and perspectives alongside traditional favourites. There will be six premium networking events, a new Retail Village on Palais -1, the Happetite Forum, the MAPIC Innovation Forum and Retailtech Lab (see page 67) and the second edition of LeisurUp by MAPIC. This will include a premium networking event, six conference sessions and pitching sessions (for the full report see page 43). ●



- P. 20: French Focus: Real estate activity continues across France despite economic uncertainty
- P. 23: The MAPIC Awards are back
- P. 24: Sessions grow to make sense of an increasingly complex market
- P. 27: The Happetite Forum: F&B's new recipe for success
- P. 28: Visit the Retail Village (Palais-1). A new generation of mould-breaking brand on show at the Retail Village





# Real estate activity continues across France despite economic uncertainty

French retail real estate players have proved nothing if not resilient this year, with Presidential elections and energy-supply issues adding to an uncertain backdrop. Yet the major players seem confident in their strategies ●

THE FRENCH retail and retail property sector will be in focus at this year's MAPIC, with the French Forum taking place on November 30, covering the leisure markets and sustainability.

Many of the major players will be present, including BNP Paribas, Carmila, Compagnie de Phalsbourg, Eurocommercial, Klepierre, Nhood, Societes des Centres Commerciaux, Socri, Unibail-Rodamco-Westfield.

According to BNP Paribas, after a record first quarter, French retail market momentum continued into Q2 2022, with €1bn invested for a total of €2.5bn over the first six months of the year. More than 100 transactions were closed in H1 2022, compared with less than 70 for the same period in 2021, with six exceeding €100m. This strong performance has been echoed in earnings reports from the major

French players. For the six-month period ending June 30, retail real estate developer Klepierre reported like-for-like net rental income up 66.7% year on year and occupancy rates improving to 94.7%. The extension of Gran Reno, Bologna, Italy opened in early July with 98% occupation, while €431m in disposals closed since January 1 has brought its loan-to-value ratio down to 38.8%.

Jean-Marc Jestin, chair of the executive board, says: "Klepierre delivered a steady performance over the first six months, with a rise in net current cash flow per share, supported by growth in rental income, an increase in retailer sales and dynamic leasing."

Other investments include the refurbishment and extension of Grand Place in Grenoble, France and the development of five Primark megastores in Italy and

France, with most set to open by the end of the year. Total capital expenditure in the first half of 2022 amounted to €90.9m, of which €57.7m was in development projects.

The refurbishment of Grand Place was delivered in March, with new store signings including Vans and Lego. In addition, the first stone was laid for construction of a 16,200 sq m extension in May, with completion scheduled for the end of 2023.

In H1 2022 Unibail-Rodamco-Westfield (URW), continued its deleveraging progress through disposals, including the disposal of Solna Centrum, Stockholm, a 45% interest in Westfield Carre Senart and Carre Senart Shopping Parc, in the Paris region.

Furthermore, URW's partner in Aupark, Bratislava, exercised its call option to ac-



Etienne Dupuy  
Ceetrus Properties





quire an additional 27% stake.

In July, the group also signed an agreement for the sale of Villeneuve 2, Lille, with disposals of €1.2bn, meaning URW has completed €3.2bn of its €4.0bn European disposal programme.

In H2 2022, URW will deliver the Les Ateliers Gaite, Rue de la Boucle project at Westfield Forum des Halles and Porte de Paris at Westfield Les 4 Temps, representing a total of circa. 31,000 sq m.

Apsys has announced that funds managed by Apollo, as part of its European principal finance business, agreed to subscribe to undated subordinated notes for €150m. Apsys is active in France and Poland, with a portfolio of assets worth €2.2bn at the end of 2021, and the proceeds will be used to finance growth and reduce leverage.

The company says this transaction enables Apsys to strengthen its strategy as a multifunctional urban player and to support strong growth in its portfolio over the next few years including, in particular, delivery of Neyrpic in Grenoble, Maison du Peuple in Clichy and the future Bordeaux Saint-Jean district.

Apsys' operational portfolio is valued at €2.2bn and the gross development value of its pipeline is estimated at €1.7bn.

"I am delighted that Apollo has decided to invest significantly in Apsys," founding president of Apsys, Maurice Bansay, says. "This transaction demonstrates the confidence placed in Apsys and its teams, the quality of assets and projects under development, and expertise in creating high value-added assets."

To speed up the construction of a reinvented real estate division, Antoine

Grolin, chair of New Immo Holding, appointed two CEOs in June 2022 for Nhood Services and the properties company Cetrus, respectively.

Etienne Dupuy was appointed CEO of Cetrus Properties, responsible for €7.2bn in assets, 225 commercial sites and 1.8 million sq m of shopping centre space. Marco Balducci was appointed CEO of Nhood Services, with his goal to usher in transformation of retail and real estate to support Nhood customers, and the regeneration of mixed living areas to create "spaces for living better."

New Immo Holding is continuing to roll out initiatives to support the projects for grocery chain Auchan's sites such as the Auchan Counord mixed urban project in Bordeaux and renovations at the Roncq and Plaisir sites.

Grolin says: "The Cetrus-Nhood pairing is under way, working towards a reinvented real estate business. Nhood, in its role as a services company, while Cetrus' performance confirmed a recovery in H1 2022." Meanwhile, Alain Taravella, chair and founder of Altarea, reports: "Altarea reported solid financial performance for the first half of 2022. Despite a fairly difficult general environment, Altarea's teams has shown their great agility. In retail, we carried on our asset management strategy while operations are back to normal."

"This performance is not based only on the huge urban transformation market in which Altarea holds the leading position, but also — and above all — on our know-how and our mindset as a developer. The portfolio of new products we are developing should start to contribute from 2023 onwards."

Investment also continues, with Allianz

Real Estate concluding the year with multiple transactions in its historically core market, France — in particular, Paris. Loans included €466m to a consortium of borrowers for the refinancing of a prime retail portfolio, predominantly located in Paris and Brussels, the largest European debt deal for Allianz Real Estate in 2021. A €127m green development loan was provided to the French group Apsys for the construction of its lifestyle centre in Grenoble.

Finally, Eurocommercial reported steady recovery across its 24 shopping centres during H1 2022 and completed its €200m disposal programme with the sales of Les Grands Hommes, Bordeaux for €22.5m and its remaining 50% ownership of the office and residential parts of Passage du Havre, Paris. The company remains owner of 50% of the retail element with a 14,000 sq m GLA and 40 tenants including Fnac.

In France the 1,600 sq m new development adjoining the shopping centre at Shopping Etrembieres has been completed and let to two restaurants, Les Trois Brasseurs restaurant and microbrewery and Il Ristorante.



#### France at MAPIC highlights

Wednesday, November 30  
11:30: France Forum: Shaping a sustainable future.  
12:00 France Forum: A deep dive into the french leisure market.

They are coming:  
BNP Paribas, Carmila, Compagnie de Phalsbourg, Eurocommercial, Klepierre, Nhood, Sociétés des centres commerciaux, Socri, Unibail Rodamco...





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# The MAPIC Awards are back

The prestigious **MAPIC Awards**, created to reward the finest retailers and retail real estate projects in the industry, will be back on stage at Cannes this year, recognising the best in retail, F&B, leisure, sustainability and urban regeneration ●



The gala dinner takes place from 19.30 on Wednesday, November 30, and is by reservation only: For ticket information please contact MAPIC Awards at [mapic.awards@rxglobal.com](mailto:mapic.awards@rxglobal.com)

THE MAPIC Awards are back for the first time since 2019 and will be presented at a gala ceremony on Wednesday, November 30, in Cannes this year as part of the three-day MAPIC, LeisurUp and The Happtite event.

As in previous years, more than 300 of the most influential retail real estate professionals, leisure operators and F&B specialists will attend the red-carpet event. The winners are selected by a hugely experienced awards jury — headed once again by Mayte Legeay-Astudillo, senior asset manager, Europe, for Resolution Property — drawn from all sectors of retail and all parts of the world. And importantly, this year's MAPIC Awards classifications represent the changing face of retail and

the major pillars of MAPIC itself, with categories for F&B, leisure, city regeneration and retail developments, plus retail innovation and sustainability included in the scope of the Awards.

Created in 1996, the MAPIC Awards reward excellence, innovation and creativity in the retail real estate industry and this year the jury once again comprises high-profile real estate experts who meet in Paris in October to shortlist the finalists in each category.

The shortlisted MAPIC Awards finalists will be announced shortly after the Jury meeting, before the winners are announced at a gala dinner in Cannes.



## President of the jury Mayte Legeay-Astudillo

Senior asset manager, Europe  
Resolution Property, UK

## Jury members



### Pascal Barboni

Managing director  
Frey, France



### Alain Boutigny

Editor in chief  
Sites Commerciaux, France



### Michelle Buxton

CEO and founder  
Toolbox Group, UK



### Lorraine Dieulot

Lifestyle business unit  
director Saguez & Partners,  
France



### Jonathan Doughty

Director-Leasing,  
Special Projects,  
ECE Marketplaces, UK



### Steffen Eric Friedlein

Managing director, leasing  
ECE Marketplaces, Germany



### Ana Guedes de Oliveira

Executive director,  
developments  
Sonae Sierra, Portugal



### Jennifer MacDonald

Senior director, real estate  
Brookfield Properties, UK



### Clementine Pacitti

Group head of CSR  
Klepierre, France



### Fabien Stutz

Head of real estate,  
Peek & Cloppenburg,  
Germany



### Aldolfo Suarez

Partner, Lombardini22,  
Italy



### Benjamin Tetard

Senior director, partnership  
& own retail, concessions,  
EMEA / Timberland VF  
Corp, Switzerland



### Robert Travers

Head EMEA retail & leisure  
Cushman & Wakefield, UK





# Sessions aim to make sense of an increasingly complex market

MAPIC has created six premium networking events in the Verriere Grand Auditorium. They are invitation sessions, only available to MAPIC participants ●

ALONGSIDE a packed programme of open sessions at MAPIC, LeisurUp and The Happtite Forum, as usual MAPIC will host a number of invitation-only events aimed at specific sectors and interests.

This year the traditional MAPIC Outlet Summit and Multi-unit & Master franchise summit will also be joined by sessions dedicated to How To Shape Retail In Cities; Meet The Leisure Operators; and two new networking events — Sustainability Workshop and Legal Forum. The Sustainability Workshop is a new format providing participants with accurate information about the key elements that make a project sustainable, featuring successful business cases and networking with experts and specialists. The event is dedicated to landlords, retailers, investors and cities.

## Tuesday, November 29: The Legal Forum

The Legal Forum has been created to support the industry facing current challenges — including innovative use of technology and data, new forms of leasing, licensing and franchising, doing business both through ecommerce platforms and stores. The forum will bring together landlords, retailers and asset managers.

## Tuesday, November 29: Cities Summit

This summit will look at how cities can reinvent themselves to remain attractive for retailers, featuring successful business cases and networking opportunities with experts. Undoubtedly one of the hottest topics at MAPIC

this year will be cities, with many of Europe's largest urban centres hit hardest by the decline in tourism during — and in the aftermath of — the pandemic and an ongoing decline in footfall because of hybrid working. By contrast, neighbourhood shopping has seen something of a revival.

## Wednesday, November 30: Leisure Summit

An exclusive networking event focusing on new business models and the latest location-based entertainment trends and projects to shape lifestyle destinations. Leisure operators will once again be in high profile, as LeisurUp brings together landlords, cities, retailers and leisure specialists to discuss future opportunities in the sector.



Franchising in focus



## Tuesday, November 29: MAPIC Outlet Summit

With the European outlet industry coming together once again at MAPIC, the sector has bounced back after the pandemic-forced travel moratorium of recent years. Looking forward to this year's gathering, Ken Gunn, founder of Ken Gunn Consulting reckons that the European market now comprises 218 major sites with a total GLA of 4.2 million sq.m.

"The European outlet industry has recovered strongly from the pandemic. Double-digit growth has pushed annual turnover passed 2019 levels and occupier demand has returned to a positive footing. However, the conflict in Ukraine has inhibited growth in Central Europe, particularly in the Russian Federation," Gunn says.

His latest research estimates that the number of stores operating at European outlet centres increased very slightly (by 0.8%) to 15,469 in the 12 months to July 2022, while the number of brands operating across European outlet centres declined slightly (by 0.4%) to 4,417 in the same period. This was in part dictated by brand reductions in Russia.

In terms of sectors, upscale brands (+3.1%) added more stores than mid-scale brands (0.1%), with 444 new

brands entering the European outlet industry in the year to July 2022, up 18% on July 2021. In addition, 330 brands expanded their estates, 11% more than the previous year.

Gunn says: "While outlets' core fashion proposition strengthened during the crisis, growth has slowed in 2022 as brands adjust to lower consumer demand and less unsold stock. This has created opportunities for non-core

.....

**"The European outlet industry has recovered strongly from the pandemic"**

Ken Gunn

.....

merchandise, particularly F&B brands, and leaves outlet well placed to benefit from the cost of living crisis."

## Wednesday, November 30: Multi-unit & Master franchise Summit

Franchising opportunities have become an increasingly important element of the mix at MAPIC and this year an invi-



MAPIC Outlet Summit

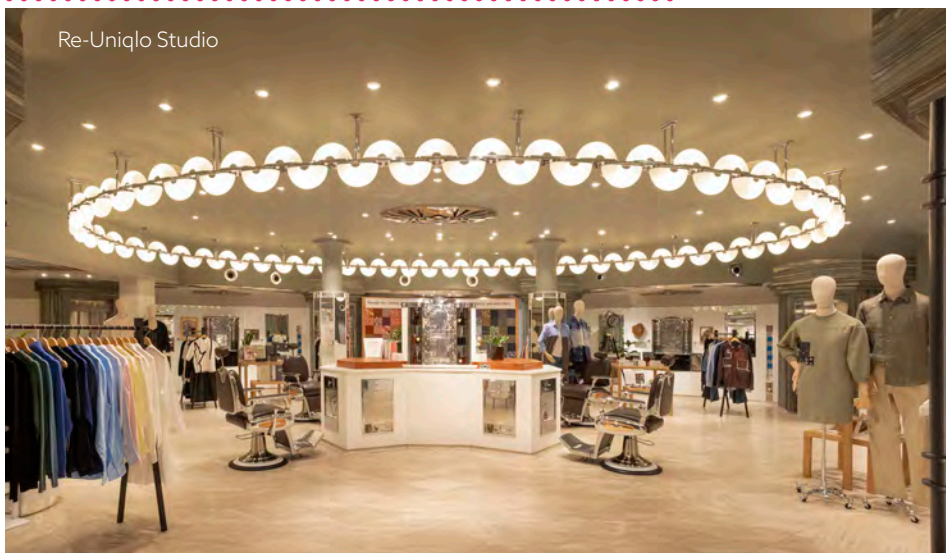
tation-only event will once again focus on expansion opportunities for retail, hospitality and leisure.

The key to success is a measured and coherent strategy right from the off, says Rebecca Viani, partner and head of international development & franchising advisory, WhiteSpace Partners.

She warns that, for example, disparate geographical openings can mean not only that franchises may develop in markets that are difficult to support, but also that their success or failure can impact franchise opportunities further down the line. "Those first franchise locations need to be success stories because they're building the foundation for the future," she says. "Seasoned franchisees are going to look at this as well. So when you have a strategy, you choose specific markets. You have reasons why you chose those markets. That also gives a lot of comfort to potential franchisees because they see that you're really putting the time and resources into what it takes to grow via franchising."

She adds: "Doing it the ad hoc way, you run into all types of unnecessary challenges, whether it's trying to support across different time zones, trying to support a market that's culturally on a different spectrum, or locations that are difficult to get to quickly."

Re-Uniqlo Studio



## Tuesday, November 29: Sustainability workshop

AS RETAIL increases its focus on sustainability, Japanese fashion retailer Uniqlo opened a Re-Uniqlo Studio in the basement of its Regent Street, London store on September 8, just a few days after nearby department store retailer Selfridges committed to a target of half of its sales coming from repair, recycle and re-use. Re-Uniqlo Studio is essentially a service hub for customers, allowing them to repair their Uniqlo garments and extend the lifetime of their clothes. It includes: a care department offering sustainable solutions to caring for clothing; an alterations service for altering Uniqlo garments; and re-imagined products using 'upcycling' garments that couldn't be sold into new iterations. It will also include a recycling centre for customers to bring in their unwanted clothing. The Re-Uniqlo Studio is due to roll out globally this year and next and is in line with Uniqlo's goal to increase the proportion of recycled materials used in its products to approximately 50% by 2030.



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# The Happetite Forum: F&B's new recipe for success

This year's The Happetite Forum is focused on the future of hospitality and F&B venues, highlighting the new generation of F&B operators who are dictating the direction of the industry ●

THE 2022 edition of The Happetite Forum at MAPIC will not be a retrospective of how the food and beverage (F&B) sector has weathered the pandemic and economic storms, but will only be facing forwards, according to Jonathan Doughty, director, special projects, ECE and chair of advisor WhiteSpace Partners.

The Happetite Forum is in its second year at Cannes after debuting in Milan and Doughty is one of the key industry figures to have worked alongside the MAPIC team on this year's conference programme. The intention from the outset was to gather together those people and players who are shaping and driving the future direction of the industry.

Not least among these, the F&B key-note is US-based retail guru Paco Underhill, strategic advisor for Envirocell Global and best known for his seminal

consumer behaviour book *Why We Buy*, originally published in 1999, and more recently *How We Eat*.

Other speakers in a packed agenda include Lucie Basch, co-founder of rapidly expanding international food waste reduction company Too Good To Go and Holly Hallam, managing director of DesignLSM, plus Saguez & Partners and Manifesto Market.

"There has been a big shift for this year's The Happetite content and the focus is on those people and businesses who are doing things really well and who can help attendees understand what the future looks like," Doughty says.

As a result, he emphasises that there is nothing on the programme that looks to the past or "covers old ground"; the focus is very much on how F&B spaces need to evolve.

"People really missed them [during the pandemic] and really value these spaces,"

You can discover the food conference track on [mapic.com](https://mapic.com) 5 food sessions to attend from 9:30 to 14:30 on 30 November! For the food pitching sessions, each company has five minutes to present its concept and at the end of each session, the audience will vote for the best pitch. The best of all MAPIC pitches will be recognised at the MAPIC Awards ceremony.

.....  
**"F&B has been  
guilty of a  
man's-eye view"**

Jonathan Doughty,  
ECE and WhiteSpace Partners

.....

Doughty says. "But F&B has also been guilty of a man's-eye view of the types of places that men want to eat in. There is a new generation of fantastic female designers who are doing an amazing job of creating commercially successful locations with a much broader outlook."

One thing to note, Doughty says, is that all the speakers scheduled to participate are originally from outside the F&B industry, with none from a food service or hospitality background.

"So this tradition of people steering the sector who had parents as chefs or who owned restaurants and who were trained as chefs themselves is really coming to an end," Doughty says. "It is people coming in from outside, with fresh ideas and perspectives, who are currently driving the trends. And that's who visitors will learn from at The Happetite Forum."





# A new generation of mould-breaking brands on show at the Retail Village

IT WAS not that many MAPICs ago when few pure online retail brands or proptech firms were present in Cannes, let alone taking centre stage. How quickly things change.

MAPIC — as ever an incubator for new ideas — is showcasing brands and concepts from the cutting edge of the industry, from digital native vertical brands (DNVBs), the fast delivery specialists, drop shipping and more, while humanity has become more conscious of environmental, social and cultural sensitivities. Cue a new generation of brands at The Retail Village, an exhibition zone at the heart of the show with key retailers exhibiting and pitching sessions. These new concepts, redefining the retail landscape, will be centre stage.

Poolday Paris, a beach and swimwear

retailer built on an ethos of providing body-positive clothing, is one of the select few to be chosen to appear at the Retail Village. The French DNVB has made waves since it was founded by three friends, three years ago.

While Poolday Paris started life online, as many growing DNVBs have found, the power and presence of physical retail space makes too much of a statement, making it hard to stay virtual forever. Poolday Paris co-founder Julia Desvignes says: "We are a swimwear brand for all body types, we do small quantities and limited series.

"For the moment, we have one physical store in Paris and we would love to develop to be physically in-store, because women love to try on the swimsuits to get the perfect fit, not as average clothes. We would

The Retail Village at Palais -1 will showcase a select few of the most innovative retail concepts in the industry today. **Ben Cooper** spoke to some of the brands pushing the boundaries at MAPIC this year ●

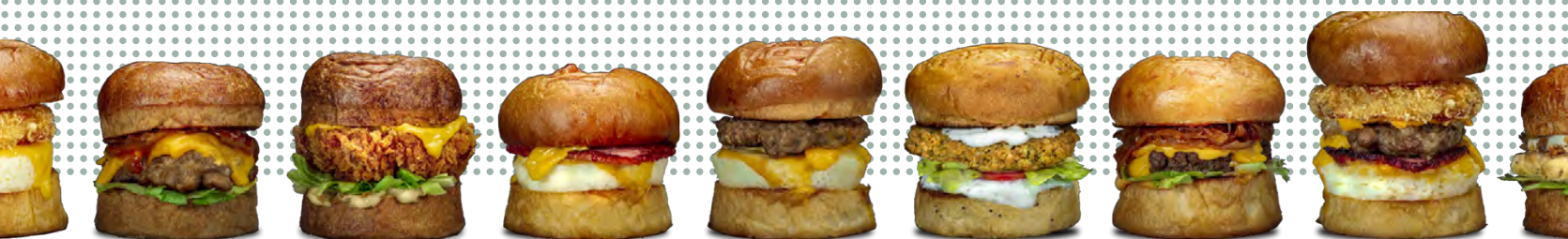
like to open new stores as Poolday stores but also to be present in many retailers in the European and US markets."

So why has Poolday — a DNVB with only one store to date — chosen to be at MAPIC and in the Retail Village in particular?

"Because it seems like very dynamic actors of the retail industry will be there," Desvignes says. "And as a young DNVB we love to meet new people and talk about physical retail which is our main development axis. We know we will meet interesting people and learn about the industry."

British company Seekd is more of a community, a collective of designers bound together by a sense of responsibility for the environmental impact of their work. The designers signed up to the com-





Slim Freddy's, specialises in bite-size burgers

munity focus on making items from eco-friendly, recycled, upcycled and natural materials, or responsibly sourced through fair-trade agreements, to meet an increasing appetite for climate-positive shopping.

Rather than go down the traditional store route, Seekd founder Fay Cannings has entered into deals with a number of landlords to deliver pop-up stores in select London locations. And since July this year Seekd has been in partnership with upmarket department store Harvey Nichols.

What is Cannings looking forward to about being in the Retail Village at MAPIC?

"Essentially an international platform

**"We know we will meet interesting people and learn about the industry"**

Julia Desvignes,  
Poolday

and retail partnerships with potential investors who genuinely get the need and opportunity to work with talented small mission-driven brands to diversify and strengthen their offer." She says: "It's been made possible through being selected to be part of the first Retail Village at the world's leading property retail conference.

"It's so valuable to showcase our brand and community which is a real niche in the market for eco-friendly accessories and sustainable brands. We hope really to stand out through our differentiated offer among the mix of brands handpicked at the Retail Village — it's a privilege to be there and with such fantastic companies." Indeed, those companies include some of the best and most innovative retail and

leisure concepts from around Europe.

For example Kilo Shop, a boutique retailer selling entirely recycled vintage clothing — one of the most tangible means of making fashion more sustainable. The company sells vintage clothing in three ways: by the kilo at its pop-up shops around the UK; through its Kilo Limited collection on its online shop; and customising unwanted clothing to create Kilo Rework collections.

Established by the Chambers of Agriculture France in 2021, Fermes and Co develops and manages a network of stores under the Bienvenue a la ferme brand, partnering with farms across all operational aspects of setting up stores. There are five stores already open, predominantly in north west France, with a target of 100 stores by 2026. The aim is to connect consumers with seasonal farm products and support local producers.

Established 100 years earlier, mountaineering fashion and accessories brand Millet was founded and is still based in Annecy. The brand has taken part in a century of mountain sports, gearing up the majors and the amateurs, and originally produced a yellow Sherpa 50 backpack before expanding its offer.

Restaurant group Place des Oliviers is an innovative leisure concept, transporting visitors to its own version of an idyllic Provencal village, complete with authentic rural snacks and petanque — a version of boules — at four French locations, Lesquin, Bondues, Henin Beaumont and Valenciennes.

Burger chain Slim Freddy's is also looking to expand, with four French stores, a UK outlet in London at Wembley Park and another to open in Paris. Founded in 2018, the company specialises in bite-size burgers and is actively seeking franchisees.

Another exhibitor is global fitness giant F45, which was founded in the inner Sydney suburb of Paddington in Australia in



Fay Cannings

2012 and is financially backed by Hollywood star Mark Wahlberg. It is ranked as one of the world's fastest-growing franchises, with over 1,750 gyms in 45 countries with more than half a million members.

Meanwhile, French department store retailer Galeries Lafayette acquired e-commerce platform La Redoute earlier this year, having owned over half of the shares in the platform since 2017. The company has been expanding rapidly, adding international markets, which now account for around 30% of sales, and opening a small number of stores in major cities.

Italian pet retailer Julius trades from 12 locations and specialises in food, pharmacy products and accessories. It opened a flagship store at a retail park close to the Milanofiori shopping centre in May. With 5,000 sq m divided evenly between retail store and logistics, Julius' first Lombard store is the largest pet shop in Italy and, despite being in a stand-alone format is located near a retail park.

The new pet shop will feature the same format of the Rome-based company, with the Milanese store including a pharmacy with a wide range of products from care to supplements. The company is also going to be opening streamlined and urban formats.

"For Julius this department is not just a feature, but a real flagship," says Giorgio Carotenuto, retail director of Demas and manager of the Julius chain. "All our stores include this service through the presence of a registered pharmacist."

#### Retail Pitching sessions

Each company has five minutes to present its concept and at the end of each session, the audience will vote for the best pitch. The best of all MAPIC pitches (leisure, food and retail) will be rewarded at the MAPIC Awards ceremony.



# Retail, Leisure & Food concepts at the heart of MAPIC!

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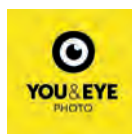
## Stop by the Retail Village ! 📍 Palais -1

The Retail Village is bringing together new rising concepts, digital marketplaces,  
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are redefining the retail landscape and appealing to an increasingly ethical consumer.

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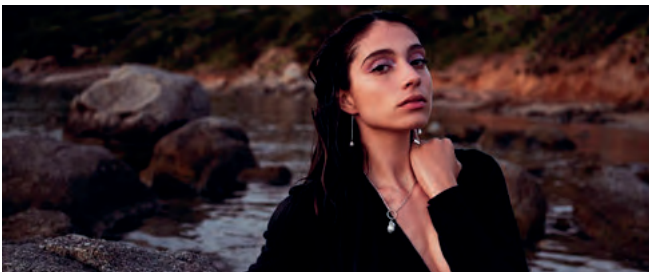
## A snapshot of the 30 exhibiting retail village concepts...



**Place des oliviers** is a space dedicated to petanque with a setting of a village of Provence. An original concept with a relaxing catering area for both professionals and individuals.



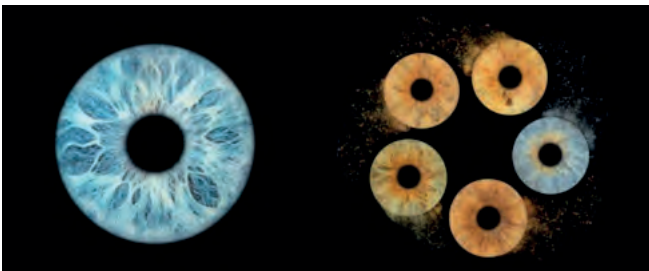
With **Fermes and Co**, consumers buy extra fresh and seasonal farm products and support local producers in a concrete way. 100% of the products are in season and the fruit and vegetables are harvested at the right time! It's only products from local producers to promote short circuits and limit intermediaries.



**Seekd** is the marketplace for unique, chic, eco-friendly jewellery & accessories that give back to people and the planet. It features a diverse range of up and coming designers.



**Kilo Shop** concept is based entirely on the recycling of vintage clothing which is given a second life in Kilo Shop boutiques! It offers a different, more sustainable way of consuming.



**You & Eye** is a photo gallery of iris based in Paris. After a few explanations about the colors and structure of your eye, you can choose the size and type of frame you want. The store can sublimate your photos with a true work of art. They also offer photo editing and different effects to make your print even more unique.



**Le Chanvrier Français** is a network of shops specializing in the sale of premium CBD based products : oils, beauty products, selection of tea, vapes and honeys which are all made in France and marketed under its own brand.





[View more concepts](#)





AT A GLANCE

# CONFERENCE PROGRAMME

<div></div> <div><b>WELCOME RECEPTION</b> 28 NOVEMBER   MAJESTIC HOTEL   19.30-23.00 (open to all delegates, badge required)</div>				
TUESDAY, 29 NOVEMBER - MORNING				
STUDIO	<div>09.30-10.00</div> <div>OPENING SESSION The retail roadmap for a sustainable future</div>	<div>10.00-10.30</div> <div>KEYNOTE The science of shopping in a post pandemic world</div>	<div>11.00-11.30</div> <div>From responsible consumers to sustainable retail</div>	<div>12.00-12.30</div> <div>Landlords &amp; tenants partnerships: go agile to evolve to new business models</div>
ARENA		<div>10.30-11.00</div> <div>OPENING SESSION New leisure trends spotlight</div>	<div>11.30-12.30</div> <div>Leisure pitch contest - Live Vote <i>Winner revealed at</i> </div>	
MAPIC INNOVATION FORUM		<div>10.30-11.30</div> <div>Innovation pitch</div>		
VERRIÈRE GRAND AUDI			<div>11.00-13.00</div> <div>PREMIUM NETWORKING EVENT How to shape retail in cities!  By invitation only</div>	
TUESDAY, 29 NOVEMBER - AFTERNOON				
STUDIO	<div>14.00-14.30</div> <div>LEISURE KEYNOTE Bringing emotion in physical spaces</div>	<div>15.00-15.30</div> <div>TEA PRESENTS Attracting new audiences: Events and touring attractions at retail destinations</div>	<div>16.00-16.30</div> <div>TEA PRESENTS Success factors for integrating Culture and Arts in visitors attractions. Best cases in leisure and entertainment</div>	<div>17.00-17.30</div> <div>Licensing &amp; destinations: Leading brands into the real world</div>
ARENA	<div>14.00-15.00</div> <div>Retail pitch contest - Live Vote <i>Winner revealed at</i> </div>	<div>15.30-16.30</div> <div>City talks</div>		<div>17.00-18.00</div> <div>Food pitch contest - Live Vote <i>Winner revealed at</i> </div>
MAPIC INNOVATION FORUM	<div>14.30-15.00</div> <div>Taking the customer experience to the next level</div>	<div>15.30-16.00</div> <div>Tech for good</div>		
VERRIÈRE GRAND AUDI	<div>14.00-15.30</div> <div>PREMIUM NETWORKING EVENT Sustainability workshop  By invitation only</div>		<div>16.00-18.00</div> <div>PREMIUM NETWORKING EVENT Mapic outlet summit  By invitation only</div>	



WEDNESDAY, 30 NOVEMBER - MORNING

STUDIO	09.30 - 10.00 <b>Green means go:</b> Accelerating environmental transition for retail destinations	10.30 - 11.00 <b>Urban logistics and retail:</b> the great shift	11.30 - 12.30 <b>FRANCE FORUM</b> 11.30-12.00 Shaping a sustainable future	<b>FRANCE FORUM</b> 12.00-12.30 A deep dive into the french leisure market
ARENA	9.30 - 10.00 <b>OPENING SESSION</b> The restaurant industry: New challenges and opportunities	10.00 - 10.30 <b>KEYNOTE FOOD</b> We are what we eat	11.00 - 11.30 <b>New F&amp;B business models:</b> Get inspired!	12.00 - 12.30 <b>Eating with your eyes:</b> Why design and the food experience go hand in hand
MAPIC INNOVATION FORUM		10.30 - 11.00 <b>Metaverse: The driving force in a new immersive experience</b>	11.30 - 12.30 <b>Innovation pitch</b>	
VERRIÈRE GRAND AUDI	09.00 - 10.30 <b>PRIVATE EVENT</b> ECSP Retail & leasing group		11.30 - 13.00 <b>PREMIUM NETWORKING EVENT</b> Green leases, flexible agreements, new models: How legal can support the transformation of the retail property industry - By invitation only	

WEDNESDAY, 30 NOVEMBER - AFTERNOON

STUDIO		15.00 - 15.30 <b>Sustainability &amp; mixed-use:</b> The key growth drivers for retail property	16.00 - 16.30 <b>Why everyone loves retail parks</b>	17.00 - 18.30 <b>Italy Forum - Places, People and the Planet:</b> Shopping Centres, full speed ahead!
ARENA	14.00 - 14.30 <b>KEYNOTE</b> Sustainability in food with digital	15.00 - 16.00 <b>Italian Retail pitch contest Live Vote</b>  <i>Winner revealed at</i>	16.30 - 17.30 <b>Leisure pitch contest - Live Vote</b> <i>Winner revealed at</i> 	
MAPIC INNOVATION FORUM	14.30 - 15.30 <b>Innovation pitch</b>			
VERRIÈRE GRAND AUDI	14.00 - 15.30 <b>PREMIUM NETWORKING EVENT</b> Meet the leisure operators! <i>By invitation only</i>		16.00 - 17.30 <b>PREMIUM NETWORKING EVENT</b> Multi-unit & Master franchise summit <i>By invitation only</i>	



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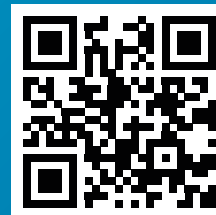
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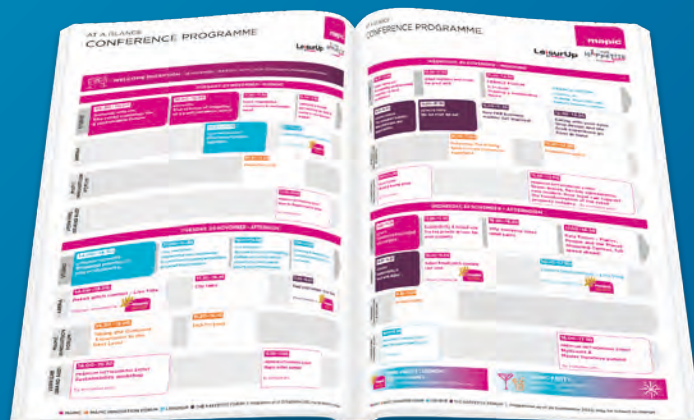
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# MAPIC 2022: Six key pillars

MAPIC 2022 will be based around six key pillars focused on new retail, food & beverage (F&B), leisure, sustainability, real estate and the rise of mixed use, and innovation.

This year LeisurUp will be at Palais -1 with a packed programme of premium networking events, pitching sessions and conferences.

The Retailtech Lab will debut at the MAPIC Innovation forum at Riviera 7 and you can book a tour at [mapic.com](https://mapic.com)

For the Happetite Forum, a dedicated programme of conference sessions will focus on F&B at the Arena on November 30, from 9.30 to 14.30.

Over the following pages, the editorial team reflects on the background and context behind these key pillars ahead of MAPIC.



Finland-based brand Surf House mixes surfing with socialising

**P. 37: Retailers show optimism in a difficult market**

**P. 43: Leisure and retail join forces in the post-pandemic world**

**P. 49: Food and beverage gets creative as it emerges from the pandemic**

**P. 55: Sustainability has to start at the top**

**P. 61: European projects offer a glimpse into the future of retail real estate**

**P. 67: From the mall to the metaverse: tech takes the lead in Cannes**

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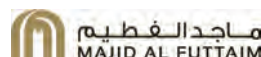
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# Retailers show optimism in a difficult market

Signs of a post-COVID retail recovery at the start of 2022 have given way to gloomier conditions for retailers and investors as the consumer cost-of-living crisis deepens. But, as **Ben Cooper** reports, there are bright spots, and bright ideas, lighting the way ahead ●

IN MAY this year, global shopping centre owner-operator Ingka Centres cast a welcome vote of confidence in European physical retail space. Announcing a massive €3bn of investment to expand, modernise and revitalise Ingka's physical portfolio by the end of 2023, retail operations manager Tolga Oncu says: "Our stores remain

one of our biggest strengths."

It wasn't just a positive sign for any interested observers of European retail real estate — a statement that physical stores, and mixed-use spaces are still hot property; it was telling for the way in which Ingka and others are facing the future and spending their money.

Citing investment in the group's dec-

ade-old Matkus Shopping Centre in Kuopio, Finland, Oncu describes the "dual role" the group envisaged for such malls, "giving our customers the best of both physical and online retailing". Indeed, everywhere you look, retailers and retail property owners are adapting. And with the immediate future posing challenges well beyond changing shopper habits, both retailers and their landlords will need to be ready for more change — and ready to be tested.

The beginning of 2022 was promising for investors compared with the upheaval of the previous two extraordinary years. Post-pandemic optimism was showing among shoppers, retailers and real estate investors and the Colliers European Retail Pricing Map for the first half year reflected some of that positive sentiment

Despite ongoing concerns over global supply chains, all three of the major re-

tail real estate asset classes were showing improvements in rental levels says Colliers, and markets across the continent — though by no means everywhere — were reporting "positive and stable rental conditions".

This broadly positive picture for H1 is also borne out in data from CBRE, which recorded retail investment volumes across Europe hitting €20.3bn in the first half of 2022, an increase of more than 50% on the first half of 2021. The key drivers of this: Germany, Spain, France, the UK and the Nordic countries.

Reflecting on European investment volumes in August, Chris Gardener, managing director of CBRE Capital Markets and head of European retail, says: "We have witnessed a noticeable uptick in retail investment transactions in 2022 which has been spearheaded by post-COVID trading recovery. While



Tolga Oncu, Ingka Centres





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grocery and retail park assets remain in high demand, we are starting to see liquidity within the shopping-centre sector as the year progresses.” But there is no denying that in the second half of the year, a different economic picture has emerged.

Lingering problems in retail logistics, by then causing real shortages and subsequent price rises, were compounded in February by the Russian invasion of Ukraine, one inevitable consequence of which — further disruptions to supplies of grain and other staples — is now becoming very real.

With heat waves and record temperatures recently scorching much of Europe and impending gas restrictions as Russia continues to squeeze supplies going into the autumn, the industry is bracing itself for the cooler weather. Leclerc CEO Michel-Edouard Leclerc recently told France Info radio: “For this winter we have a crisis scenario where Russia cuts gas supplies. We could close some stores during certain hours.”

Most French supermarkets have already collectively agreed to cut electricity usage, lowering in-store temperatures, dimming lights and switching off screens after closing time as part of a so-called ‘energy sobriety plan’ to save on power this winter. Retail specialist association Perifem — which assists retailers with technical issues related to

the climate — has announced a series of measures that most supermarket and hypermarket groups will adopt from October 15.

Other signatories to the energy cuts declaration include grocery giants Auchan, Carrefour, Casino, Intermarche, Lidl, Picard and Systeme U.

As Lydia Brissy, director of European research at Savills put it in the company’s H1 European Investment Spotlight report: “The retail sector is about to face another storm, with the European purchasing power about to decline”. For businesses hoping to return to a version of stability in 2022, statements like this make for tough reading. Facing rising costs themselves, retailers are in the unenviable position of passing increased expenses on to consumers, or taking a big hit on margins to keep their customer base.

Retail property investors won’t need to be told what impact this could have on European investment volumes. But Europe is not a homogenous region and there are markets, sectors and retailers, which continue to perform strongly.

Marie Hickey, director of commercial research at Savills, says that individual sectors are likely to hold their resilience no matter the economic weather.

“It’s about which parts of the market will be most resilient. Premium, luxury and F&B will continue to be resilient in

.....

**“We are starting to see liquidity within the shopping-centre sector as the year progresses”**

Chris Gardner,  
CBRE

.....



Chris Gardner

the face of that, and leisure. Retail’s got so much more granular than it ever was before. Just look at London. The affluent neighbourhoods are performing really strongly,” she says.

Furthermore, some individual retail brands are sensing opportunities for growth, with the transition towards physical space being made by formerly online-only or digital native vertical brands (DNVBs).

Hickey says that one of the main reasons for this is the high costs DNVBs find when it comes to acquiring new customers. Founding a brand and gaining an online presence through social media is often the relatively easy part — building on this and taking real market share, can prove much harder — almost impossible without at least a minimal physical presence.

“Since COVID we’re seeing a lot more interest from online-only brands looking at physical space,” Hickey says. “There definitely seems to be an acceleration of these brands looking at physical stores. Customer acquisition costs have gone up and retail rents have declined. They’re looking at ways to access these customer bases.

“Their strategy is to open one or two stores in a couple of key markets around Europe. I think the online vs physical stress point has gone. It’s about the holistic deal.”

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Lucie Basch



Marie Hickey

One high-street big-hitter already dominant in its domestic market is pressing ahead with major plans to expand its presence across continental Europe.

Fraser's Group is currently very much in expansion mode, with plans to make the Sports Direct brand a high-street name well beyond its British base.

The group, whose portfolio also contains fashion brands Jack Wills, USC and Flannels, and department store House of Fraser, already has a considerable presence in Europe and Fraser's Group head of real estate James France is clear about the group's ambitions going forward.

"We want to become Europe's number-one sporting goods retailer," he says. "We're looking across Europe. We will grow organically. We are now finding ourselves being able to compete better and compete in prime positions. There's a lot going forward."

With expansion plans for France — where the company believes the potential for 50 stores exists — as well as Spain, Portugal, Belgium, Luxem-

bourg, Denmark, the UK and Ireland, Hungary, Poland and Slovakia, expect the Sports Direct brand to be a major talking point at MAPIC this year.

Then there are new players which certainly do not fit into the traditional retail model, but to which retailers and investors should be paying attention. One of these companies is Too Good To Go, whose founder Lucie Basch will be at MAPIC to discuss the revolutionary concept, and how the retail property world can get involved.

Frustrated at the huge levels of waste in the grocery sector, which collectively throws away millions of tonnes of expired food every week, Basch and Jamie Crummie set about designing a system — which culminated in an app — whereby customers could get discounted access to food destined for the bins and retailers could sell products just past their best.

Since its launch in Scandinavia in 2016 the app has amassed millions of users accessing deals from 165,000 food stores across 17 countries in Europe and North

America. And this year Basch will speak to MAPIC delegates about the importance and the benefits of signing up, for landlords as well as retailers.

She says: "It's a win-win-win. It's in companies' ecological and economic interests. Everyone now understands that we need to become more sustainable. The beauty of reducing food waste is that it is an example of how you can help the planet and make economic sense."

#### Retail conference highlights

##### Tuesday, November 29

10.00: The Science Of Shopping For A Sustainable World, Paco Underhill  
14.00: Retail Pitch Contest

##### Wednesday, November 30

15.00: Italian Retail Pitch Contest  
16.00: Multi-unit & Master Franchise Summit (premium networking event)

##### Tuesday November 29 – Thursday 1 December

The Retail Village: A new area dedicated to international retailers

## Oslo emerges as new Nordic luxury centre

OSLO's newly developed and vibrant waterfronts, the new — and huge — National Museum, the impressive Munch Museum, the opera house and library are spearheading the city's cultural renaissance.

And Oslo's luxury retail has been playing catch-up after previously being overlooked by many major brands. However, careful real estate management of a couple of city-centre blocks by landlord Promenaden, anchored by Steen & Strom, has revolutionised the city's luxury retail offer, attracting both international tourists and affluent local shoppers.

Louis Vuitton has relocated to a significant corner plot over two floors on Nedre Slottsgate, Oslo's

premium luxury street within the Promenaden fashion district, while Dior recently joined Hermes, Burberry and Gucci there.

Central to this emerging luxury offer is Steen & Strom, which has commemorated its 225th year with a major €36m refurbishment as the first phase of a complete overhaul, including a repositioned main entrance, revamped beauty hall and signature new atrium.

To direct the change, Steen & Strom has poached department store veteran David Wilkinson, who says: "Our aim is to transform the store on two main building blocks, becoming a single destination for contemporary fashion, and creating a home and lifestyle centre with an interesting mix of brands."



The revamped beauty hall at Steen & Strom



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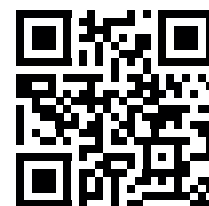
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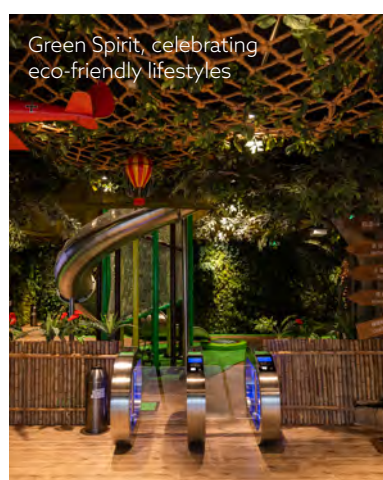
# Leisure and retail join forces in the post-pandemic world

ONE OF the most notable things about the development of leisure and themed attractions in recent times has been the divergence between the small and specialist, and the huge and all-encompassing. IP-themed parks have taken characters and shows from the screen into reality, while competitive socialising and even indoor surfing are on offer within malls and retail complexes. As landlords look to diversify their destinations and attract new visitors, the market continues to expand. Reflecting this growth, MAPIC is hosting the second edition of LeisurUp, showcasing over 50 companies in its exhibition area at Palais -1 and a raft of conferences, workshops and networking. Experience UK, the trade body which represents UK companies that supply the visitor experience sector, is taking a delegation to LeisurUp by MAPIC.

“The UK thrives with companies who combine innovative storytelling, innovation and technology to drive the future of visitor experience from a variety of angles, and we are thrilled to be putting these companies in front of key players in the retail and the leisure sector at LeisurUp by MAPIC,” says Vanessa King, social and content manager at Experience UK. “Our delegation will consist of location-based entertainment designers, visitor technology specialists and others, each of whom offer a next-generation product and/or service which are ready to break-ground in retail spaces, high streets and shopping destinations around the world. Experience UK will host a booth at LeisurUp by MAPIC, in association with key stakeholder the Department for International Trade.

The leisure sector has been boosted by a post-pandemic desire for people to meet and socialise, with specialist projects increasingly incorporated within or adjacent to retail environments. **Mark Faithfull** looks at some of the operators coming to LeisurUp by MAPIC ●

At the show, a variety of operators and concepts will be showcasing their expanding business propositions, including TFOU Parc from Indoor Park Entertainment (IPE) — a family entertainment concept for shopping centres of 2,000 sq m to 3,500 sq m, with several different universes targeted at families with children under 12 years old. Based on content from the leading French children's channel TFOU, the first opened at the Evry2 shopping centre in Paris last year and a larger centre is now set to open at Aushoring Promenade De Flandre in Belgium. A further site at Lille Tourcoing is due to open before the end of the year. “The aim is to recreate the universe of children's and teenagers' favourites through fun and interactive activities,” CEO and partner at IPE Francois Pain



Green Spirit, celebrating eco-friendly lifestyles

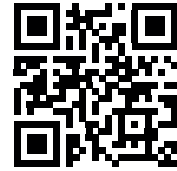


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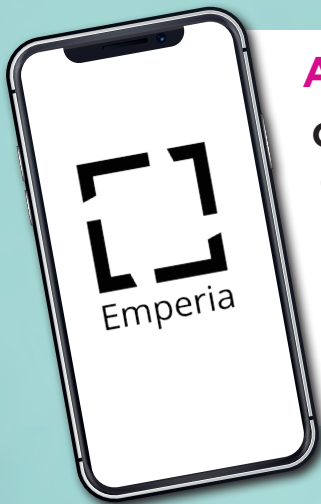
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says. “The aim is to implement amusement parks directly in shopping centres to increase footfall, attract new audiences and help establish the concept for destinations.”

Green Spirit is a multicultural creative design company founded in 2014 in Florence, Italy and aiming to create a brand that, through entertainment and edutainment, raises awareness about the importance of eco-friendly lifestyles. The company says that it creates tailor-made projects ranging from active entertainment to fun edutainment, FECs, kids cafes, immersive experiences, eatertainment, tourist attractions, interactive museums, water parks and theme parks.

“We are specialists in creating spaces for leisure standing out with high impact atmospheres, allowing the transformation of single projects into successful networks, especially for shopping malls,” says Fabrizia Ruggio, business development manager.

Among Green Spirit’s concepts, Jungle Entertainment provides space for children and their families to create memories through nature-based atmospheres. “The project mixes the fun entertainment part with a learning educational environment in a very immersive approach,” Ruggio says. “An extremely themed location, characterised by the jungle scenography and organised in

different themed areas, reproduces a real small indoor theme park, where physical play and virtual entertainment create an original mix for all ages.”

Leisure is increasingly being used as an element of urban regeneration and MAPIC sponsor Nhood and Ccetrus Italy are due to launch LOC — Loreto Open Community — in 2026. This will transform Piazzale Loreto from a large urban void to Piazza a Cielo Aperto, a public space intended as a sustainable neighbourhood. The new urban district in Milan will include retail, leisure, food, sport, offices and co-working areas. LOC will create a large interactive hub hosting activities and events.

In addition, Nhood and Ccetrus Italy are also renovating and doubling the size of the Rescaldina Shopping Centre to create a new entertainment centre. The concept, due to open in 2024, will focus on hospitality, well-being and eco-sustainability and the architecture is based on nature: water, air, forest and mountain. Similarly, To Dream, Turin, will cover 270,000 sq m and will, Realia says, be “an unprecedented concept combining shopping, leisure, services, offices and hospitality.”

To Dream, Turin will include 25 restaurants featuring a number of debuts in Italy, a vast entertainment area, an events arena, eight-screen cinema, a gym, services and a four-star hotel, plus the new

.....

**“The aim is to implement amusement parks directly in shopping centres to increase footfall”**

Francois Pain,  
IPE

.....



Michelin headquarters, all set within a 23,000 sq m urban park.

Finland-based Surf House has been looking to expand its leisure concept and in 2020 teamed up with Hong Kong-based Scallywag Entertainments to support the business development of Surf House branded restaurants and bars. Surf House has three businesses in Thailand and Finland, as well as new projects under construction in Hong Kong and Spain. It opened its first location in Kata Beach Phuket in 2013, a second venue at Patong Beach in 2016 and in 2019, its first fully indoor venue in Helsinki Finland, inside Mall of Tripla. This allows guests to surf, dine, drink and party.

“Everyone needs entertainment, but no one wants to operate it. That’s where Surf House comes in,” says Surf House CEO, Janne Miikkulainen. “We have taken the Flowrider, a stationary wave guests ride with a bodyboard or flowboard, and created an entertainment concept around it focusing on indoor surfing, food and beverage, and events. We developed our concept to fit shopping centre spaces and technical requirements and put a lot of effort in to both technical solutions and sourcing authentic materials to generate a real summer vibe. The secret lies in the atmosphere: the air temperature and quality, the warm sand, the palm trees, and many more features contribute to the incredible summer vibe.”

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14.00 - 15.30

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### Mapic outlet summit

16.00 - 18.00

Our annual focus on the dynamic and expanding designer outlet sector, will bring together outlet developers, retailers & investors.

## WEDNESDAY, 30 NOVEMBER

### Green leases, flexible agreements, new models: How legal can support the transformation of the retail property industry **NEW**

11.30 - 13.00

A new format to support the industry facing current challenges such as innovative use of technology and data, new forms of leasing, licensing and franchising, doing business both through ecommerce platforms and stores.  
This forum will bring together lawyers, landlords, retailers & asset managers.

### Meet the leisure operators!

14.00 - 15.30

An exclusive networking event to get insights on the latest trends in leisure, discover some key projects integrating leisure in lifestyle destinations and network with a targeted audience to discuss about the best model to integrate leisure into retail and urban destinations.  
This event will bring together leisure operators, landlords representatives, cities representatives and retailers.

### Multi-unit & Master franchise summit

16.00 - 17.30

An exclusive networking event bringing together international franchise partners and a selection of retail and restaurant leading brands willing to boost their business around the world.

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# Six new growth leisure concepts for 2022

In a post-COVID world people are looking to socialise and enjoy leisure time together and **Thomas Rose**, co-founder of advisor P-Three, says a number of top trends for leisure concepts are emerging ●

## The return of the music venue

Pent-up demand has seen the opening of several new music and live entertainment venues, with other major projects proposed. It is likely this trend will continue across Europe, with medium-sized venues often delivered by local government or part of major mixed-use destinations.

## Competitive socialising

The growth in competitive socialising continues to be the biggest global leisure trend and shows no sign of slowing. UK-based Flight Club Darts is now a global business, having opened in the US and Australia and it is looking for joint venture and franchise partners in Europe.

## Leisure concepts and the metaverse

Metrix, a football-based concept working with the UEFA Champions League, operated a pop-up at Westfield, London with Unibail-Rodamco-Westfield. The real world linking to the digital world concept transfers players' real-world football skills, established in the venue, into the virtual world to create player profiles and avatars.

## Family leisure

Operators such as arcade brand Gamestate (Netherlands, Germany) are opening new locations, while UK-based Gravity is expanding with its first European location in Leipzig, Germany. Situated in the NOVA leisure and shopping centre, the franchised space totals 5,300 sq m and includes trampolines, a ninja obstacle course, wipe-out, soft-play, party rooms, F&B plus and e-karting.

## Health and wellbeing

Aside from the traditional gym, groups such as Berlin-based John Reed Fitness expanding internationally, there are operators such as Therme Spa, which is launching in Manchester to create "the UK's first city-based wellbeing resort". It already operates in Germany and Romania, with sites in Scotland and the US planned.

## Extreme sports

Several occupiers and venues are seeking to make extreme sports mainstream, including the world-first triple-floor indoor skate park, F51 in Folkestone, UK and the Hasewelle surf machine in L&T Sporthaus in Osnabruck, Germany.



UK-based family activity concept Gravity eyes expansion

LeisurUp  
by MAPIC

### LeisurUp by MAPIC highlights

**Leisure conference track**  
Six dedicated conference sessions to cover the latest trends.

**A Leisure Workshop**  
An exclusive, invitation only, networking event bringing together decision-makers from leisure, retail and property, with insights on the latest trends, plus key projects and networking.

**Leisure Pitching sessions**  
Two pitching sessions where each company has five minutes to present its concept. The audience will vote for the best pitch and the best of all MAPIC pitches (leisure, food and retail) will be rewarded at the MAPIC Awards ceremony.

**LeisurUp exhibition area**  
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Flight Club Darts, a global business



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# Food and beverage gets creative as it emerges from the pandemic

The food and beverage market has had to learn how to adjust and adapt, following two years of disruption from the pandemic. **Mark Faithfull** looks at how the industry is regrouping after a prolonged slowdown ●

THE FOOD and beverage (F&B) market has had to learn how to adjust and adapt. The pandemic put the brakes on a hugely expanding market, forcing operators to become far more digital, focus on home delivery and implement extensive hygiene protocols.

More recently, the industry has had to cope with a huge shortfall in staff and changing working practices, meaning that many city-centre locations remain far quieter than they were before the pandemic.

But after a hiatus, expansion has begun again, with a number of US-based brands busy in Europe, including quick-service chains McDonald's, Taco Bell, Carl's Jr, Wendys, Wingstop, Popeyes and Slim Chickens. Filipino chain Jollibee is also growing rapidly, with most chains starting in the UK and then opening in Mainland Europe.

"Our success has been built on several key factors including our choices around how, where and with whom we grow," Wingstop vice-president, development EMEA, Lisa Paton says. "Wingstop typically follows a franchising model with over 94% of our restau-

rants operated by our brand partners. While most of our restaurants are located within the US, we have a vision to have 7,000 restaurants globally with 3,000 outside the US."

The company began in 1994 as a small buffalo-style chicken-wing restaurant in Garland, Texas, and has developed into more than 1,500 restaurants across the US, Mexico, Colombia, Panama, Singapore, Indonesia, Malaysia, the UK, France and the UAE.

"We are focused on entering a number of strategic international markets over the coming years," Paton says. "These are typically larger markets that align with the strengths of our brand and operating model."

Canadian fast-food giant Tim Hortons opened its first London store in Royale Leisure Park, near Park Royal, west London, this summer (on Canada Day to be precise), five years after opening its first UK store in Glasgow. It now has 55 UK outlets.

Chief commercial officer Kevin Hydes says Tim Hortons purposely took its time to make sure it got its London launch right as it sought out a site that



Wingstop is moving forward with global plans

appealed to its core customer base — families, students and commuters.

"We haven't come to London to open just one site, we've come to open many and we've got a number of sites in the pipeline that I hope will come to fruition," Hydes says. "We want to be a meaningful force in London."

Similarly, Alice Pizza has 180 outlets throughout Italy and is looking to expand in Europe: in the first phase Spain, France and Germany are very interest-

ing, according to CEO Claudio Baitelli.

"Pizza is a universal product and that leads to very stiff competition. I think the Italian market is one of the most competitive in the world in terms of the number of pizzerias," he says. "But Alice Pizza is a [pizza by the slice] concept that allows you to buy different types of pizzas and quantity per flavour. This makes the product suitable for different moments of consumption."

Udon noodle and tempura restaurant



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brand Marugame Udon recently appointed Judd Williams as head of franchise for the UK and Europe, after the company made its European debut in

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**"As we grow, we know people are looking for other new ways to interact with us"**

Laura Godsman,  
BrewDog

.....

London last year. The company has more than 1,200 sites across Asia, Europe and the US and Williams says the company is looking to expand in Europe through franchise and to have over 100 UK sites within the next five years.

In terms of identifying franchise markets, Laura Godsman, head of franchise, Brew-

Dog, says: "In its simplest form it's about wherever people like to drink good beer! That sounds like a broad strategy but it's a great position to start from and is helped by the strength of the craft beer segment globally. We refine this by looking at countries where we already have strong distribution; if people already know and love our beers, they're more likely to seek out our bars in which to enjoy more. With over 70 bars in the UK alone, we see huge opportunity to replicate this in the rest of the world."

The company — which has 100 bars worldwide and exports to 60 countries — is now branching out into family offers and hotels. "As we grow, we know people are looking for other new ways to interact with us, which is where venues like our DogHouse hotels come in. They are the world's first craft-beer hotels, fully carbon-negative and packed with awesome features: beer fridges, a 24-hour hot-dog menu and in-room guitars," she says.



## Five tips for creating a franchise strategy

### Think strategically from the start

"There are a lot of really great benefits to expanding through franchising, but we want to make sure that it's done strategically from the start," says Viani, who advocates staying close to home initially. "Those first franchise locations need to be success stories because they're building the foundation for the future."

### Choose your partner carefully

"I would say partner first and then work with the partner to find locations," she says. "It could be a challenge going into a franchise relationship with existing sites that may not be attractive to a partner."

### Think scalability

"If we look at American brands, where franchising originated, a lot of these were built knowing that they were going to be franchised. Or they developed the brand and before they started franchising they realised they needed to change their model to fit a franchising scheme," Viani says.

DECISIONS made early can influence the success of an international franchise strategy, says **Rebecca Viani**, partner and head of international development & franchising advisory, WhiteSpace Partners, who has five key tips for success:

### The offer and differentiation

"With franchising, ideally you're looking for multi-unit," Viani says. "We have some of these other single-unit brands, but all of the franchisors that we currently work with are looking for multi-unit."

### Listening and learning

"One of the big responsibilities of a franchisor is training and support — not just from an operational standpoint but from a tone-of-voice standpoint, from a culture, a brand-culture standpoint," Viani says. "We always advise to make sure that there's a shared company culture and vision because this is a very long-term relationship."



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# F&B outlets must offer something unique

A NUMBER of key F&B trends are gaining traction and Simon Stenning, founder of forecasting and strategic advisory service FutureFoodservice.com says: "In the next era it is critical that operators do everything possible to demonstrate that their dining experience is delivering something that cannot be replicated easily in the home."

## Wow!

Delivering a 'Wow!' experience is critical, especially when inflation is squeezing disposable income. Examples include the 'most Instagrammable cafe in the world', EL&N and its lurid pink premises, with stages and displays for selfies and everything designed to look beautiful and extravagant.

## Worthy

The COVID pandemic amplified and

accelerated a developing trend for society to become more caring and this extends to foodservice operators providing healthier foods or building-in concern for the planet. Neat Burger has famously gained high-profile investors including F1 driver Lewis Hamilton and Hollywood actor Leonardo DiCaprio, but most importantly delivers great tasting fast food that is completely vegan.

## Woke

Operators want to demonstrate that they are doing the right thing, and appeal to consumers who share similar concerns. Clean Kitchen Club has already grown to five sites, providing a plant-based food-to-go menu. The brand promises a focus on sustainability and is the first in the UK to calculate and label carbon emissions for dishes, with a range of eco labels from A to E.



Asian food hall at Arcade



Neat Burger, London

## Wordly

As the population becomes more global, different cuisines are gaining appeal. Asian food is now mainstream and one such example is the second iteration of Arcade, which opened recently following its COVID-forced closure and has introduced a complete range of worldly cuisines into a restaurant-style food hall.

## Wacky

The key theme from the FutureFoodservice report on the next era is a greater polarisation between value-driven social refuelling and experiences that deliver something exceptional and differentiated. One example is based on the Batman story: The Park Row restaurant delivers a fine dining experience with dishes given a cartoon twist with names such as So What if I'm Mad?, or I Am Fear.

# Why landlords need to take care with the food-hall model

MAPIC 2022 marks the second anniversary of Coverpoint Foodservice Consulting's rebirth after the long-standing leadership team took the company independent again after six years under the JLL umbrella.

Coverpoint is continuing its core business, advising landlords and developers across Europe, creating bespoke foodservice strategies in shopping centres and mixed-use schemes. It is also increasingly working with F&B concepts, including the likes of Wagamama in Europe and also with US-based restaurant brands

such as Pink Taco, the 'keep-it-real' Mexican concept and Sol Mexican Cocina, the Baja-style restaurant, which are both looking for large, 1,000 sq m prime sites in European gateway cities.

Food halls continue to be the hot topic as landlords look to fill large, vacant spaces, matched by an ever increasing operator pool, Coverpoint's Ian Hanlon says, although he cautions that competing landlords are developing food halls in close proximity, threatening the diluting of sales. "Operators are seeking longer, more se-

cure lease terms from sub-tenants, effectively making them pseudo-landlords — food halls need rapid, frequent change to maintain interest and give a reason to visit more frequently. If a food hall is taking landlord cash, then landlords want footfall in return," he says.

This has led to some operators struggling to attract enough interesting 'local heroes' to occupy kiosks, Hanlon says, adding: "We're seeing some designs with too many kiosks and too few seats. Kiosks generate the revenue, but without seats, it's like building a great engine without giving it enough fuel."

Food is high on the Agenda at MAPIC

Discover the food conference track at [mapic.com](https://mapic.com)

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# Sustainability has to start at the top

OPTING to put sustainability at the heart of business decision-making is “the best investment we’ve ever made,” according to Antoine Frey, chair and CEO of the French real estate investment company that bears his name.

Frey is the first business in its sector to become an ‘entreprise à mission’, which means it has committed to a legal framework of specific sustainability goals and strategic decisions with a wider remit than solely making money. As a certified B Corp, it must now maintain high standards of social and environmental performance, transparency, and accountability.

Traditional commercial imperatives remain vital: “We’re still here to earn money, it’s the fuel of growth,” Frey says. But now the real estate firm has pledged to operate in an environmentally friendly — and community-minded — manner. Frey, who is speaking at MAPIC, says: “We’re not doing anything for free and we still target growth and revenue gain.

We are not saying we’re going to save the world, but we have set ourselves on a direction of improvement and trying to do things better.”

A growing number of major players are

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**“New principles  
must not be  
abandoned for a  
quick win”**

Andrew McVicker,  
Pragma Consultancy

.....

pursuing carbon-reduction goals, many of which are tied to The Paris Agreement, established in 2015; and the European Union is developing regulations that will impact how the retail property sector will invest, build and manage its assets. And greater focus is turning towards the retail real estate sector and

Sustainable thinking in retail real estate is gaining traction across Europe. But according to **Ben Sillitoe**, it is the actions of the major players that will drive wider industry action

establishing policy.

For example, Josefina Lindblom, senior EC environmental policy officer, told the European Council of Shopping Places (ECSP) podcast in July that the commission is working on a directive focusing on the energy performance of buildings. Work is ongoing to define what comprises a sustainable investment, meaning those claiming such status will need to show how they are meeting certain criteria.

Before that arrives, Frey is being proactive. It has acquired and now manages 1,500 ha of French forest, used to supply the constructors that develop its shopping malls. And lease contracts demand that retail tenants are committing to do their best to reduce their carbon footprint and better serve the community.

“If the retailers do not accept the minimum then we don’t sign the contract and we don’t work with them anymore,” Frey says. “The only way to make sustainable retail is to have happy retailers.”



Elisabeth Laville



Sylvain Montcouquiol





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## Assets that respect the planet

GREEN PEA in Turin, is another example of sustainable thinking in retail property.

It opened in December 2020, providing 15,000 sq m and five floors of shopping and hospitality space — with its partners committed to the environmental and social agenda.

Tenants at the site, which is the brainchild of the family behind Italian food hall operator Eataly, are typically local and have placed green policies at the heart of their activities, or are rapidly moving towards sustainable production. Raffaele Fratto, director of operations at Green Pea, says that despite the pandemic-induced closures, more than one million visitors have made their way through Green Pea's doors.

"The partner companies and Green Pea share a 'manifesto' of a few but important guidelines," he adds. "At the basis are common values and the objective of building and selling services and products that respect the planet, with a particular emphasis on the excellence of 'Made in Italy' in the worlds of design and fashion. Together with the partner companies, we have a common path aimed at the continuous improvement of quality and production chains from the point of view of sustainability."

Meanwhile, on a smaller scale, NochMall opened in Berlin in 2020 as the city's first second-hand product department store. It is a circular economy retailer and a subsidiary of the city's waste management operator, Berliner Stadtreinigung.

Frieder Soling, CEO of NochMall, says the initiative aims to break even rather than make a profit, and the 2,600 sq m of space over two floors houses a cafe and an events space, where people are encouraged to attend repair workshops and eco talks.

"We want to influence people, we want to change people," says Soling, who is eying additional services such as tool

hire and bicycle repair to encourage greener thinking.

He says there has been significant interest from local authorities in other cities, including Munich and Stuttgart, as well as from civic and retail group leaders from Norway and Israel, in replicating the model.

Some 900 people per day walk through doors of NochMall, which Soling describes as located in an "un-hip" part of Berlin. The best-selling products, he adds, are furniture followed by crockery, and then textiles and clothing; "If the concept works here it will work anywhere," he says.

## Measurement is key to improvement

WHILE there is growing recognition of the importance of sustainability, the wider industry must engage if there is to be meaningful impact. In the absence of a standard way to monitor environmental factors — as well as social factors that are often wrapped into sustainability strategy — most businesses in retail property are not measuring them.

"It's pretty shameful how poor the retail real estate industry is at just recording commercial performance," director of retail property specialist Pragma Consultancy, Andrew McVicker, says. "Even with the growing switch to turnover rents, there are still huge swathes of the market with no idea about the performance of their tenants." Pragma is working on a tool that it says will help commercial property companies measure impact, with electricity usage, water rates, employment numbers and engagement with local community among the factors to monitor.

McVicker adds: "If energy costs are going to go up at the rate they are at present, it's less of a theoretical want and more a commercial imperative to think more sustainably. Energy efficiency or insulation will need to be considered from a commercial perspective."

"The only way to make sustainable retail is to have happy retailers"

Antoine Frey

## Major retailer and property initiatives

UNIBAIL-Rodamco-Westfield (URW) set the tone adopted by much of retail in 2022 with its January 1 appointment of Sylvain Montcouquiol as chief resources and sustainability officer. The newly established board role elevates URW's environmental and wider sustainability strategies within the organisation.

Historically, McVicker says, any type of sector change tends to come from identifying general best practice, and then emulating it.

"Because of the appeal of their schemes, retailers tend to meet what is required to get into Westfield and British Land sites," McVicker says. "If the industry sees retailers are willing to sign up to social, eco and commercial requirements to get in there, then there's a hope it will percolate across the industry and you get an agreed set of principles."

Mutual agreements would be needed to ensure new principles are not abandoned "for a quick win in terms of turnover or rental income," McVicker adds. "But if these larger firms can do it, the rest of the industry will follow." There is plenty of specific activity. During September, The Crown Estate partnered with Lone Design Club, an independent designer concept store, to launch a pop-up celebrating emerging brands, companies and people working towards a more sustainable future.

Located on Regent Street, London, The Conscious Edit store includes products to buy and fashions to rent with Rotaro and customers can bring pre-loved items to be repaired and upcycled, in-store, with Sojo. There is also a range of talks, digital activations, live podcasts, catwalk shows and presentations.

Similarly, a circa 6,000 sq m department store with a focus on sustainability, called The Good Store, has opened on South Molton Street in Mayfair,





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## MAPIC sustainability charter: Turning sustainable goals into a reality

MAPIC aims to substantially reduce waste generation before, during and after the show, through prevention, reduction, recycling and re-use. To reinforce and manage this long-term strategy, MAPIC is developing and implementing tools to monitor sustainable development and putting in place strategic projects that will help decrease the environmental impact of the event. MAPIC will be engaging clients, partners and service providers, encouraging them to adopt sustainable practices and to integrate sustainability information and behaviour in their value chain.

40%

Percentage of female speakers at MAPIC 2022 and of jury members for the Awards

80%

Percentage of food produced locally for the opening networking night

100%

Percentage of reusable stands using sustainable material provided by MAPIC (Partner: Green-Bee Event Upcycling)

London. The store carries a selection of sustainable products and brands across clothing, accessories, health and beauty, furniture, homeware, tech and books.

The concept has been created by Groundwork London, one of a group of charities “mobilising practical community action on poverty and the environment”, which has a partnership with the South Molton Street property owner Grosvenor.

Joanna Lea, retail director at Grosvenor, adds: “The Good Store is an exciting retail concept providing a route to market for high-quality sustainable products, improving London’s circular economy and supporting social enterprises.”

IKEA property arm Ingka Centres also launched a new rental platform at community shopping centre Livat Hammersmith, London, called the Library of Things. Customers can rent out tools and household items and are able to share practical skills like DIY and repairs with others. Founded in 2016 the concept is now open in nine locations across London.

At the same location Ingka Group and fast fashion retailer H&M have introduced Atelier100, a maker-based concept store for local creatives. While it has debuted in London, it could equally exist in Stockholm or Paris, Berlin or Barcelona, and the project initially launched in April with a call for creatives, makers and manufacturers to share their ideas. The aim is for the first selection to begin selling their products from this autumn.

Camilla Henriksson, global brand manager at H&M, says that local relevance is at the heart of the project and the form must be dictated by the host city and its creative community. “We want to see how this plays out,” she says. “It has to be driven by the makers and it is a challenge to us simply to be curators.”

Henriksson is also in charge of developing H&M’s Looop initiative in Stockholm, where customers can bring in old clothing to be re-made

as something new. Henriksson says that it has proved to be popular but that it remains in “the early stages of developing at scale” because the machinery is large — although getting smaller — and the process takes three to four hours.

“We do hope to build more,” she says. “It very much fits with our ethos to be responsible for the whole lifecycle of our products.”

Elisabeth Laville, founder of sustaina-

“It’s about radically shifting the business model to build purpose-driven companies”

Elisabeth Laville,  
Utopies

bility consultancy Utopies, and another speaker at this year’s MAPIC, adds: “It is about radically shifting the business model to build purpose-driven real estate companies, who not only tend to minimise their negative impacts but try to have a positive impact on society and the planet.”

MAPIC is committed to sustainability

Sustainability takes centre stage at MAPIC 2022 with dedicated conferences, workshops, awards and concepts. For a summary of our initiatives and efforts, explore our sustainability charter and our full conference programme on [mapic.com](https://mapic.com)

Sustainability workshop  
Tuesday November 29,  
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A new format providing participants with information about the key elements that make a project sustainable, featuring successful business cases and networking with experts and specialists. (Invitation only)  
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H&M's Looop, Stockholm



Atelier100 from Ingka and H&M




The Good Store in London





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# European projects offer a glimpse into the future of retail real estate

While development levels are far below the volumes of 10 or 20 years ago, the projects that are continuing around Europe reflect major shifts in mixed use.

**Mark Faithfull** reports

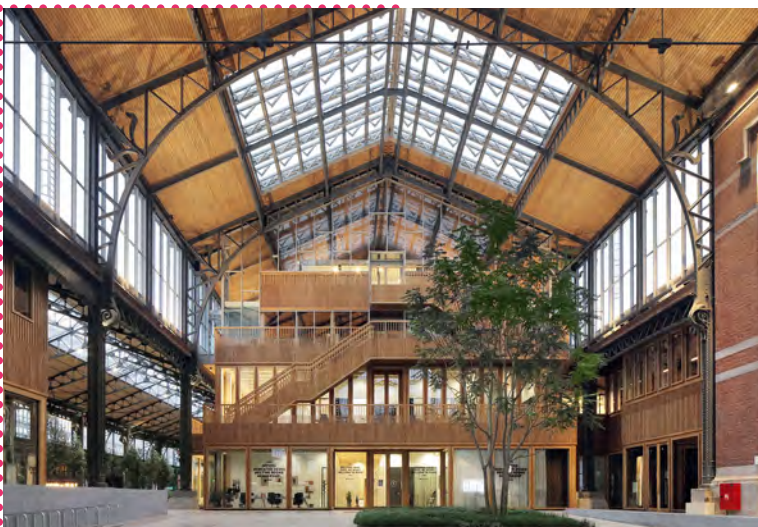


WESTFIELD Hamburg-Uberseequartier is a mixed-use urban district with flexible offices with views over HafenCity and the harbour, modern apartments with direct access to the waterfront, three hotels, and a 200-store shopping centre. The largest city-centre project in Europe, it encompasses a culture, leisure, entertainment and dining offer, 10-screen cinema, beauty and wellness centres, international and local restaurants, bars and cafes and entertainment technology.

“At around 2,500,000 sq m of development, HafenCity is one of the largest urban mixed-use projects in Europe and

one of the key components will be the new Westfield Hamburg-Uberseequartier which itself is 80,500 sq m of retail, leisure and restaurant space, opening in 2023,” advisor P-Three co-founder Thomas Rose says. “The wider HafenCity masterplan is incredibly innovative and demands creativity from developers seeking to create architectural structures of international quality, with the focal point being the Elbphilharmonie Concert Hall, which opens in 2027.”

The scheme will expand the Hamburg City metropolitan area by 40% and the proportion of public and publicly accessible private open spaces is 38%.



GARE Maritime in Brussels consists of the repurposing of a former rail freight terminal to create 30,000 sq m of workspace, 10,000 sq m retail space and 2,500 sq m food-hall space, alongside a significant amount of public and events space. The former freight terminal is the centrepiece of the wider Tour & Taxis development with a focus on restoring original features alongside new architecture — the developer has created 12 pavilions from 10,000 cubic metres of timber, making it one of Europe’s largest cross-laminated timber (CLT) projects. The combination of shopping, work, leisure activities,

eating and drinking and public events across a heritage building with strong sustainability credentials, makes this scheme stand out in Brussels.

“Tour & Taxis will soon be home to a lively city quarter. Renovations are under way on the Gare Maritime and the expansive former freight station will become a covered neighbourhood with facilities for shopping, work, leisure activities, eating and drinking and public events,” the company says. “The Gare Maritime is already a stunning building and our renovations will highlight its beauty while increasing its functionality.”



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THE NORBLIN Factory covers a total area of over 65,000 sq m, including 41,000 sq m of modern A+ class offices and 24,000 sq m adapted for entertainment, culture, food, retail and service space. The complex includes boutique cinema KinoGram, Poland's first market with certified organic products BioBazar and the largest food court in Warsaw Food Town. New outlets opening or opened this year include the Apple Museum Poland, Poland's first fully digital art gallery, Art Box Experience, the craft beer bar Uwaga Piwo, a Bang

& Olufsen store, the Manufaktura Wiśni, and a W Kruk jewellery store. The complex will house a modern Orange Theory Fitness club, the new once.media Group, a SuperPharm drugstore and pharmacy, a Paris Optique store, as well as a Medicover Stomatologia dental care centre. Purchased in 2008 by Capital Park Group and the majority completed in 2021 — the scheme is a bold re-imagination of a former factory totalling approximately 65,000 sq m of space including 41,000 sq m of offices and 24,000 sq m of cultural uses.



AT NORDHAVN, Scandinavia's largest and most ambitious urban development project to date, vacant industrial buildings and land are being transformed into a new sustainable urban district with a pedestrian- and bike-friendly infrastructure. Conceived to meet Copenhagen's future need for housing, work began on the industrial area of Nordhavn in 2009 and buildings including The Silo, Kanonhuset, Havnehuset and Frihavnstårnet now house residents, while businesses occupy a number of structures including Portland Towers, converted twin cement silos whose cladding echoes the Øresund's tones.

Redeveloped warehouses and new buildings blend styles, sizes and heights on fragmented, small-scale plots. All this is criss-crossed by new canals showing Nordhavn's connection to the water as well as a planned marina. Buildings and the area's energy supply are environmentally friendly, employing the use of greenery. A 'five-minute city' of small hops between housing, work, day care, transport, recreation and shopping amenities, Nordhavn actively champions journeys on foot, bike or public transport. Two Metro stations opened in 2020 and a 'super bikeway' offers links to the city.



MIGHT Battersea be the last of the great UK shopping centres to open? It certainly looks that way, but what an era-ending scheme it will be. The power station opens on October 14 and is a modern mix of over 100 stores, dining, leisure, medical, wellness, co-working and offices. The original control rooms in both the 1930s and 1950s sides are being retained to serve as cool dining/drinking locations and the architecture, unsurprisingly, is the star — albeit Art Deco on one side, Chernobyl-chic on the other. Leasing director Sam Cotton says the power station is at the heart of a much wider redevelopment of the south west London site, with several stages of its residential and convenience retail and leisure plans already

complete and a new London Underground station open. But the iconic power station will inevitably be the standout. Control Room B, built in the 1950s and featuring stainless-steel control panels arranged in an arc, is to become a fashionable bar on reopening. Brands including Ray-Ban, Ralph Lauren, Tommy Hilfiger, The Kooples, Aesop and Calvin Klein will be opening among over 100 shops, bars and restaurants, 254 apartments, office space as well as a leisure offering that includes the Chimney Lift Experience. There will also be a new six-acre riverfront that is open to the public. "I am actually incredibly excited about the future of retail," says Cotton. "I hope that Battersea Power Station is a symbol of that."





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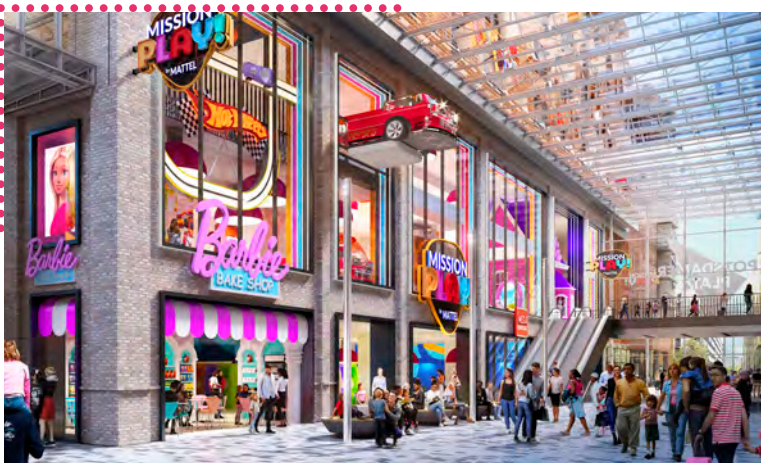
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OLYMPIA London has been an exhibition venue for over 135 years and now developer Yoo Capital is planning an ambitious culture-led expansion of the asset.

Designed by SPPARC and Heatherwick Studio, the masterplan includes Hyatt delivering a luxury lifestyle hotel with 204 rooms, alongside a Citizen M hotel with 146 rooms.

A 4,400-capacity live-music venue built on top of the existing Olympia West exhibition hall will be run by

AEG Presents, while Trafalgar Entertainment will run a 1,575-seat theatre — the largest new permanent theatre of its kind to open in London since 1976. Visitors will also be able to enjoy 20+ cafes, bars and restaurants in a sky garden with views across London and 2.4 acres of pedestrianised public space.

ASM Global has been appointed to run operations at Olympia London exhibition halls, and the new facility is expected to open in 2024.

TECHNICALLY redevelopment but in effect a new scheme, The Playce, formerly Potsdamer Platz, will comprise 90 stores in six blocks of themed areas, including food, technology, sport, fashion, lifestyle and entertainment. A complete redevelopment of the interior space and public realm will be complemented by double and triple-height facades for new emblem stores Manifesto Market, a sustainable food hall, an eco-flagship for Peek & Cloppenburg (P&C) and Mattel: Mission Play!

Manifesto Market will span 4,400 sq m, with over 750 seats on two floors, combining local gastro-entrepreneurs and artisans, as well as Michelin-starred chefs. P&C will open its first eco megastore in Berlin in 2023.

“As the company’s first pure sustainability store, sustainability solutions are being tested here on three floors and 3,500 sq m, which could also gradually find their way into other P&C locations,” according to the Düsseldorf-based company.

## Asian meeting places respond to the urbanisation of India

INGKA CENTRES managing director Cindy Andersen doesn’t want to talk about malls, she wants to talk about meeting places and why even live schemes need to be given space to evolve — especially when they cost €400m, like its latest project, Gurugram, a city southwest of New Delhi, India, which broke ground in August.

The new generation of Asian meeting places are huge — Gurugram will come in at over 158,000 sq m over nine floors — and are being conceived as places of multiple, overlapping uses.

There will be IKEA and other stores, but at Gurugram, Andersen is promising green areas, workspaces, spaces

for community events, with a focus on local needs, F&B, learning spaces, over 30,000 sqm of office space atop the retail area, alongside other initiatives.

Planned to open in late 2025, “one size does not fit all”, Andersen says. “Our Asian schemes are quite different and far more diversified. What we want to do is reach out to the community and create places where they will want to meet and visit often. In each location what that means will be different. Gurugram won’t open until late 2025, so right now I can’t say exactly what that mix will be.”

A second site at Noida, also in the Delhi area, has been acquired, and Ander-

sen points to the urbanisation of India and says the company will focus its growth and development on metropolitan India.



Cindy Andersen

### Real estate conference highlights

#### Tuesday, November 29

11.00: How To Shape Retail In Cities (premium networking event)

12.00: Landlord & Tenants Partnerships,

15.30pm: City Talks

16.00: MAPIC Outlet Summit (premium networking event)

#### Wednesday, November 30

10.30: Urban Logistics And Retail

16.00: Why Everyone Loves Retail Parks,



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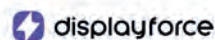
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# From the mall to the metaverse: tech takes the lead in Cannes

The MAPIC Innovation Forum will showcase an increasingly diverse set of technology providers, with everything from AI, the metaverse and mall performance evaluation under the microscope. **Liz Morrell** reports ●

THIS YEAR's programme of talks and conference sessions at the MAPIC Innovation Forum includes merging physical and digital, the opportunities provided by the metaverse, as well as innovation pitches.

For the first time at Cannes, visitors will also be able to visit the Retailtech Lab, an immersive and experiential space that will present the newest solutions and technologies at every step of the customer experience. There will be 10 to 15 companies — start-ups or scale-ups — giving presentations according to a defined itinerary to be revealed in October.

Much of the focus on innovation continues to relate to customer engagement. Tenant experience and engagement platform Chainels has been a key player within MAPIC's Innovation Forum and will be back for 2022. "Several of our client collaborations have been initiated by meetings on the MAPIC conference floor," Chainels' co-founder, COO and CFO Sander Verseput says.

This year will see the company showcasing the value that its turnover reporting module can deliver for clients, according to Verseput, who says that the module, developed only three years ago, makes it easier to collect turnover data and offer landlords insights into tenant performance. It is now used by more than 80% of its customers with a turnover rent model, including Shaftesbury, Multi Corporation, Atrium and Klepierre.

"Traditionally, the process of submitting and collecting turnover data is time-intensive for both the tenant and the property manager or owner," Verseput says. "Tenants provide performance data in a variety of formats and landlords or property managers have to export the data manually — usually into spreadsheets — and then import it into their own financial or invoicing systems. This may come in addition to owners and managers having to send tenants reminders or even chase the data if not provided in time."

Instead, Verseput says the module makes the submission and collection of turnover data a frictionless process through its smart performance reporting and integrated reminder features and saves an average of eight hours per month per asset for owners.

## Performance monitoring

At mall-management platform HyperIn, the ability to monitor the performance of property and mall portfolios in real time over the internet, is also increasingly important, according to Markus Porvari, HyperIn president and CEO.

The ability to pivot quickly means a need to have "centrally managed, robust digitised solutions," he says. And while physical stores will still be relevant, shopping-centre owners must stay abreast of change.

"The impact from COVID on retail real estate was less than we expected at

this point last year. However, the place-making industry should stay alert and prepare for the continued economic uncertainty using the right technology tools for more efficient management and monetisation of shopping malls," he says.

This means that retail real estate needs to analyse customers and campaigns using big data for successful hyperlocal and augmented reality (AR) experiences, the first stages of metaverse, Porvari says. He adds that sales reporting projections are also drastically improved with machine learning and HyperIn will be showcasing such technology enablers at MAPIC.

Shopping centres will need to move beyond basic services. "Social media influences and trends generated by AI drive consumer purchases today," Porvari says. "Offering your mall's existing products and services as a pick-up or home delivery is not enough if they do not attract shoppers in the first place. More efficient management and monetisation of the property will become vital," he adds.

## Consumer behaviour

Retailers and mall owners need to be understanding their customers too, however, something Ben Chessier, CEO of global customer-engagement company Coniq, believes is more important than ever. "The right technologies will help you to keep up with and meet evolving consumer needs and



Sander Verseput  
Chainels



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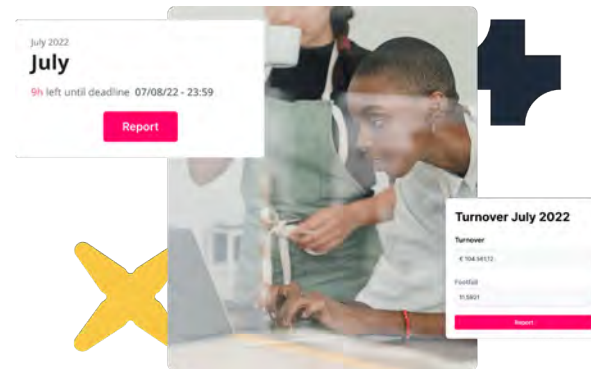
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Left to right:

Mall-management platform  
HyperIn

Tenant experience and  
engagement platform Chainel

Coniq CEO Ben Chesser

expectations," he says. "And the Innovation Forum at MAPIC gives companies the perfect opportunity to discover, debate and evaluate the latest technologies within the industry."

He says Coniq has focused on developing three key areas of innovation within its offer. These include the collection of a larger and richer range of shopping data as well as improving customer engagement and stakeholder value by making it easier to share customer insight.

"There has been a lot of innovation involved in achieving this, from introducing AI into our platform to creating new means of connecting offline and online together, and developing brand new solutions," Chesser says.

But as well as maximising opportunities at centre level, individual retailers also need to work to ensure opportunities are being grasped at all levels, according to Nihal Mougamadou, CEO and founder at Paris-based SellZone. "We can see government, states, large to even small retailers moving towards innovation," he says.

His company will be showcasing its AI technology Marketizy that can func-

tion as a sales representative either online through ecommerce or in-app or physical through digital kiosk, in-store advertising with QR Codes, etc.

"People are more and more willing to be independent in their shopping experience. Whether it can be to select their kitchen set, fashion accessories or even their cars. At the same time, the first point of contact with a sales representative is decreasing. That is why we develop AI that can chat with the customer to answer question about a specific product and/or recommend products that suit customers' requirements," he says.

Retail analytics and people-counting specialist Vemco Group says that measuring customer behaviour provides valuable information enabling store layout optimisation and campaigns in real-time. Customer and data insight are among the most important tools when a crisis hits, says the company. Software platform, Vemcount, can be used in any place with customer flows and can be hired rather than purchased. US- and UK-based Springboard is another company that delivers real-time

shopper insights. "Our footfall counting technology tracks customer movement inside and outside of locations and stores, together with the dwell time of visitors, demographics using AI technology and machine learning," head of marketing Jenni Matthews says. "This enables better and faster decision making for retailers, and shopping malls."

She says that the company also recognises the need for immediacy for data collection and delivery, hence the launch of its latest app, SB360, designed to engage retailers, collect sales data, simplify communications and provide a 360-vision for centre managers.

Springboard's technology enables retailers and centre managers to monitor visitors into stores and around the centre, use footfall data to accurately measure conversion rates, monitor dwell and movement within the destination, plan staffing schedules, identify optimum hours for store trading, measure the true ROI of marketing initiatives and events, benchmark performance against the wider market and identify trading locations for expansion

"In a world that is changing rapidly, it's important for the retail and property sector to understand both locally-specific and market performance," Matthews says. "By providing real-time data and insights we can support retail destinations and stores with faster decision making."

Another key player at this year's MAPIC Innovation Forum will be ChargeGuru Business Services, which will be showcasing its integrated EV charging product. "Our solution enables retailers, leisure and food players to achieve their sustainability goals by simplifying the transition to electric mobility," managing direc-

tor, France, Lilian Birocheau says. "Our smart services allow charging to be made available as a complementary or as a paid service for visitors, the latter generating a new stream of revenues."

And it will also help such players get ahead of their rivals, according to Birocheau: "Retailers, leisure and food players have a determining role to play in the transition to sustainable mobility by enabling electric-vehicle drivers to charge while shopping at their location. Deploying charging stations today is an opportunity to become the preferred choice for all consumers with charging needs."



Lilian Birocheau

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## Funding boost for French start-ups

### Vincent Bryant, CEO and co-founder, Deepki

"DEEPKI's scalable SaaS (software as a service) platform enables clients to collect ESG data, get a comprehensive overview of their portfolio's ESG performance, establish pathways, assess their performance and report to key stakeholders, facilitating their transition to net zero. By projecting pathways, we can estimate the impact of actions on a portfolio in years to come.

"Innovation creates commercial and community connections by facilitating communication between stakeholders and industry players who share a common goal. We recently raised €150m in the real estate industry's largest ever SaaS Climatech fundraising and this will help us to consolidate our leadership position in Europe

by growing our current teams and opening more offices, as well as establishing ourselves.

### Ismael Ould, president, Anycommerce

"ANYCOMMERCE is a SaaS that is built to accelerate commerce transformation, or at least evolution. We are an omni-channel platform that provides what retailers may need in areas like cash-in, fulfilment, loyalty and promotion. Since we are a complete solution, our strategy can be summarised as 'actionable insights for better engagement'.

"Technology has allowed thousands of retailers to offer a next-level in-store experience to millions of customers. For example, the mobile point-of-sale can totally cut the time that the customers have to go through the checkout counters. "If we are profitable today, we



Ismael Ould

needed investments to achieve our ambitions. At the beginning of our history, we sought capital in advance of the phase to build the platform. More recently, we got funded in order to accelerate the product roadmap."

### Hakim Saadaoui, co-founder, Mytraffic

"MYTRAFFIC specialises in data insights for physical places and last year we raised €10m with Alven as lead investor, alongside Kernel participating as an existing backer. The company is using the funds to develop product features and accelerate its growth in the UK, as well as France, Netherlands, Belgium, Germany, Italy and Spain.

"Founded in 2016, Mytraffic provides insights on stores, malls, offices and logistic centres to retail, real estate, asset owners and cities. The software allows for owners to set the right rental price, retail networks to select the best locations for expansion and mall marketing managers to choose areas to activate their efforts."



Vincent Bryant



# MAPIC is committed to sustainability!

Our industry is at the very heart of the efforts needed to promote sustainability, and we're committed to putting those efforts at the very heart of our own company and the conference we run.



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- 80% of the food is seasonal.

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