

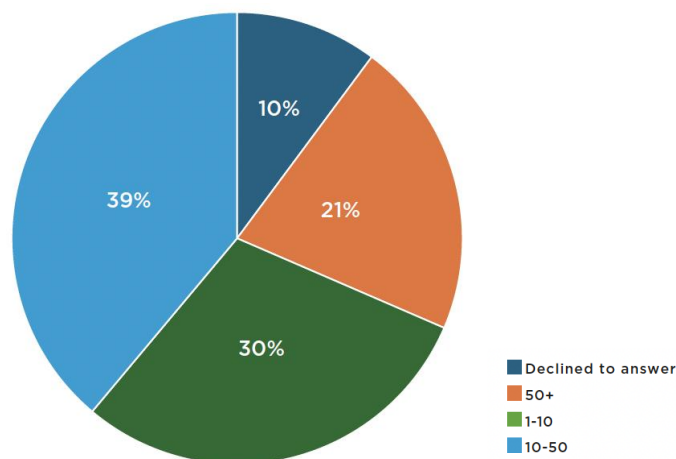
RETAIL EXPANSION STILL THE AGENDA FOR GLOBAL BRANDS

Exclusive study reveals the geographies and locations most favoured by expanding retailers

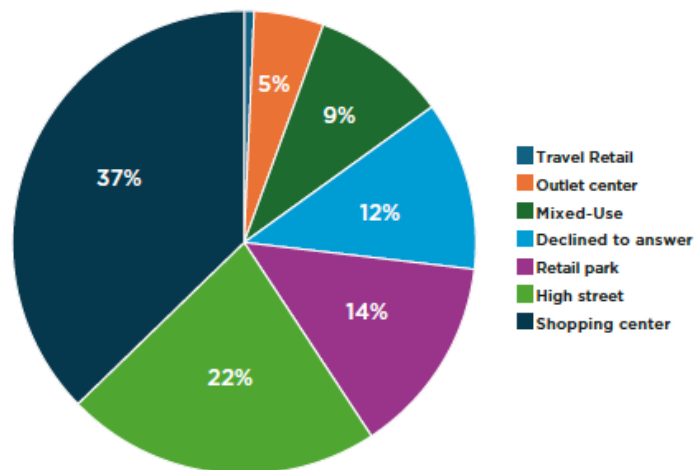
A study being launched at the largest international retail leasing event, MAPIC (4-5 November), has revealed that cross-border growth is still top of the agenda for many retail brands. The report, compiled by MAPIC, has canvassed the views 1,000 representatives of retail brands and aims to provide accurate picture of retailers' expectations and their development strategies.

A real desire for expansion

The survey revealed a genuine and tangible desire for expansion ; of the 1,000 respondents, 60% are planning to open more than 10 stores in the next two years, with over 20% indicating intentions to open 50+ stores within the same timeframe.



In terms of location, the majority of respondents cite shopping centres and high streets as their preferred locations, at 37% and 22% respectively.



As for preferred formats, one-third are seeking trading areas of between 100 m² and 300 m² and a quarter for formats between 300 m² and 1000 m².

The European continent widely favored

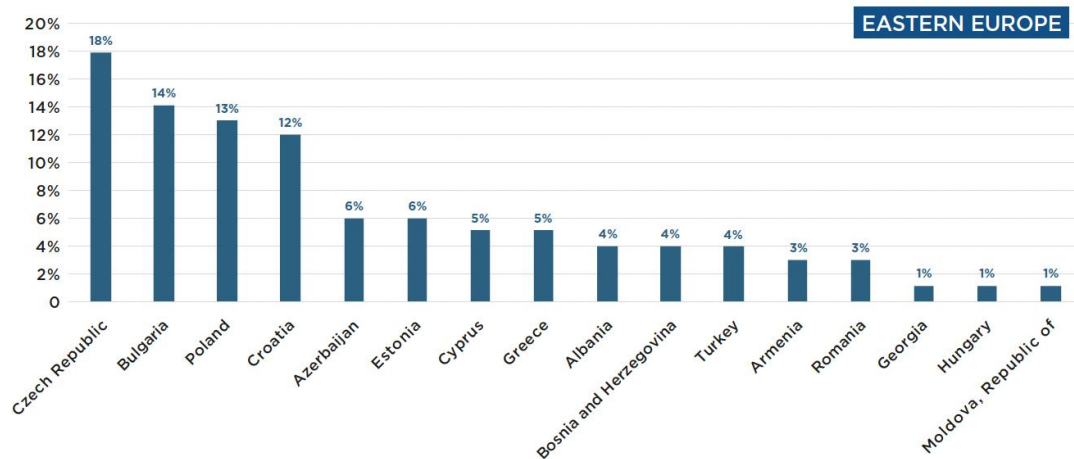
For expanding brands, Western Europe remains the most popular destination, attracting half of all planned expansion. France, Italy, Germany, Spain, and the UK top the league, representing the five most sought-after countries.

Demand for new retail space is being driven primarily by new brands from Asia or the US, such as Alo Yoga, Balabala, Bath & Body Works, Paris Baguette, Funky Buddha, Mr DIY, Dine Brands (Applebee's and International House of Pancakes), Lucciano's, or Bageterie Boulevard.

Although still relatively unknown in Europe, these brands are major players in their origin markets, comprising 7,000 points of sale across 12 countries for the children's fashion brand Balabala, 4,000 stores in 11 Asian countries for the DIY store Mr DIY, and 4,000 units worldwide for Paris Baguette.

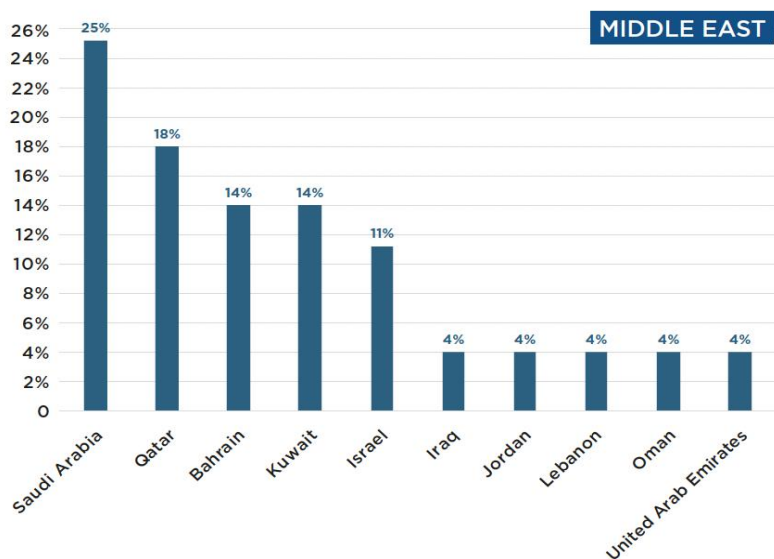
US brands seeking to increase their footprint in Europe include the Dine Brands and, beauty brand, Bath & Body Works.

Central & Eastern Europe is the next favoured territory for international brands' expansion, with around a fifth of respondents (21%) citing ambition to expand in key markets such as the Czech Republic, Bulgaria, Poland and Croatia. European brands targeting the region include Aesop, Terranova, Flying Tiger, Jeff de Bruges, Five Guys and GongCha.

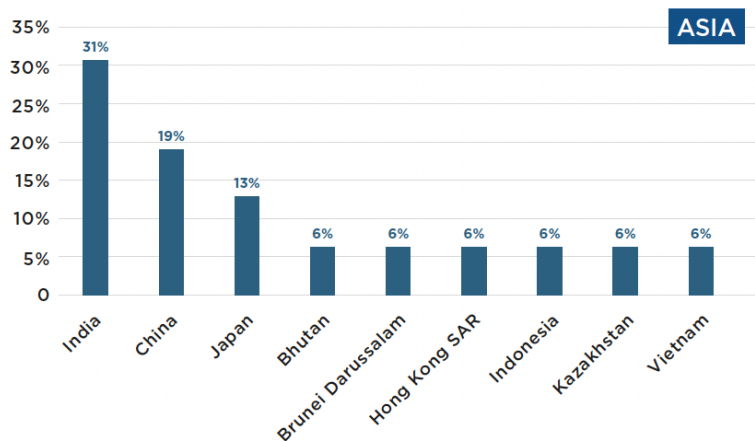


An international playground for brands

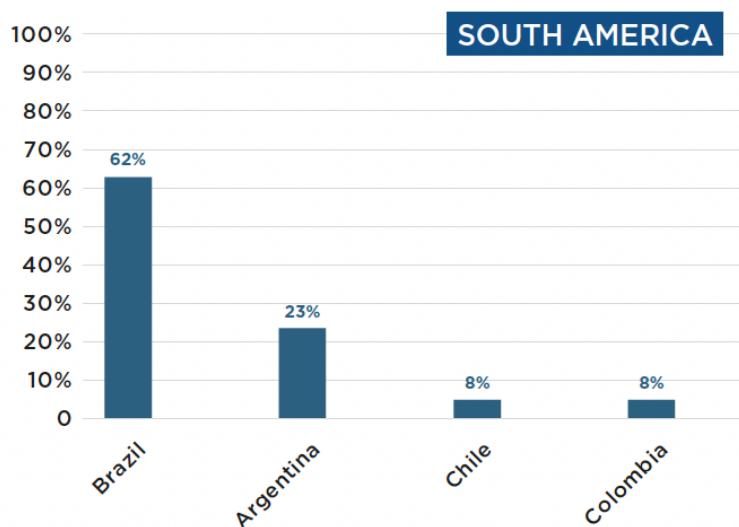
The rest of the world is not neglected, with the Middle East (15%) and Asia (11%) recording significant interest. In the Middle East, Saudi Arabia comes out on top, followed by Qatar, with demand being driven by brands such as Fnac, Apple, Primark, L'Oréal and Parfois. The low response rate recorded by the United Arab Emirates confirms the maturity of this market where most brands are already widely present.



In Asia, the Indian market continues to dominate growth plans, with a large number of brands including Apple, Flying Tiger, Swarovski, Canada Goose, Hadrena, Illy and Lululemon actively pursuing growth. China continues to attract the interest of regional players such as GongCha and international players such as Deckers Outdoors.



North America remains enduringly popular, with the United States being the most sought-after destination, followed by Canada. Among those considering expansion across the Atlantic, restaurant brands dominate with Bagelstein, Fauchon, Big Mamma, Diesel, Prêt à manger, la Piadineria, Pizzium and The Pantry. In South America, Brazil acts as a magnet for global retailers, from H&M to Pentland Brands and Leroy Merlin. Mexico, meanwhile, is the engine of Central America, attracting Western European brands such as Mary José and OTB Spa.



On the African continent, Egypt appears as a preferred target, while Algeria attracts Western European brands.

Francesco Pupillo, Director of MAPIC, said : "This study reveals how the brands participating in MAPIC are some of the key proponents of retail growth, both in Europe and in the rest of the world. We have identified about 15 emerging US and Asian brands, who will be in attendance and will form a cornerstone of the debate and discussions throughout the week".

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