

Retail in the digital world

Status, Update & Outlook

Press conference on 26th of March 2019 at 09:30 am

Speaker:



Rainer Will
Managing Director



Walter Wölfler
Head of Retail AT & CEE



Gerald Grill
Head of Retail

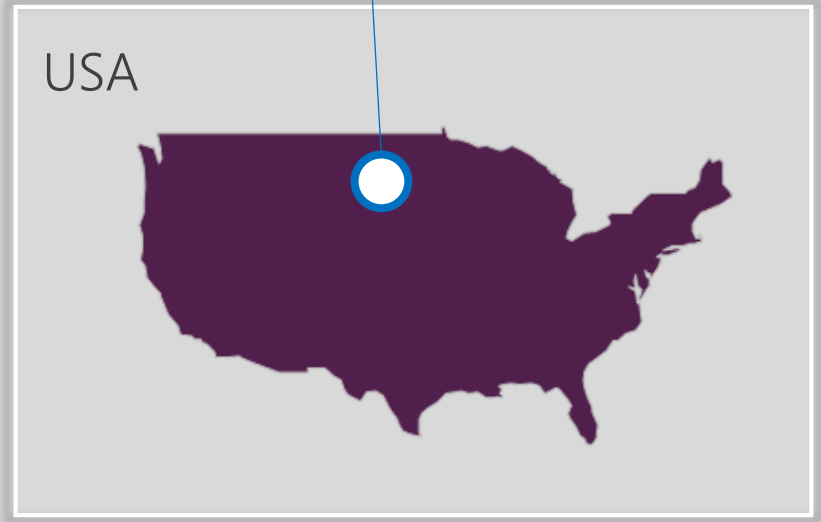
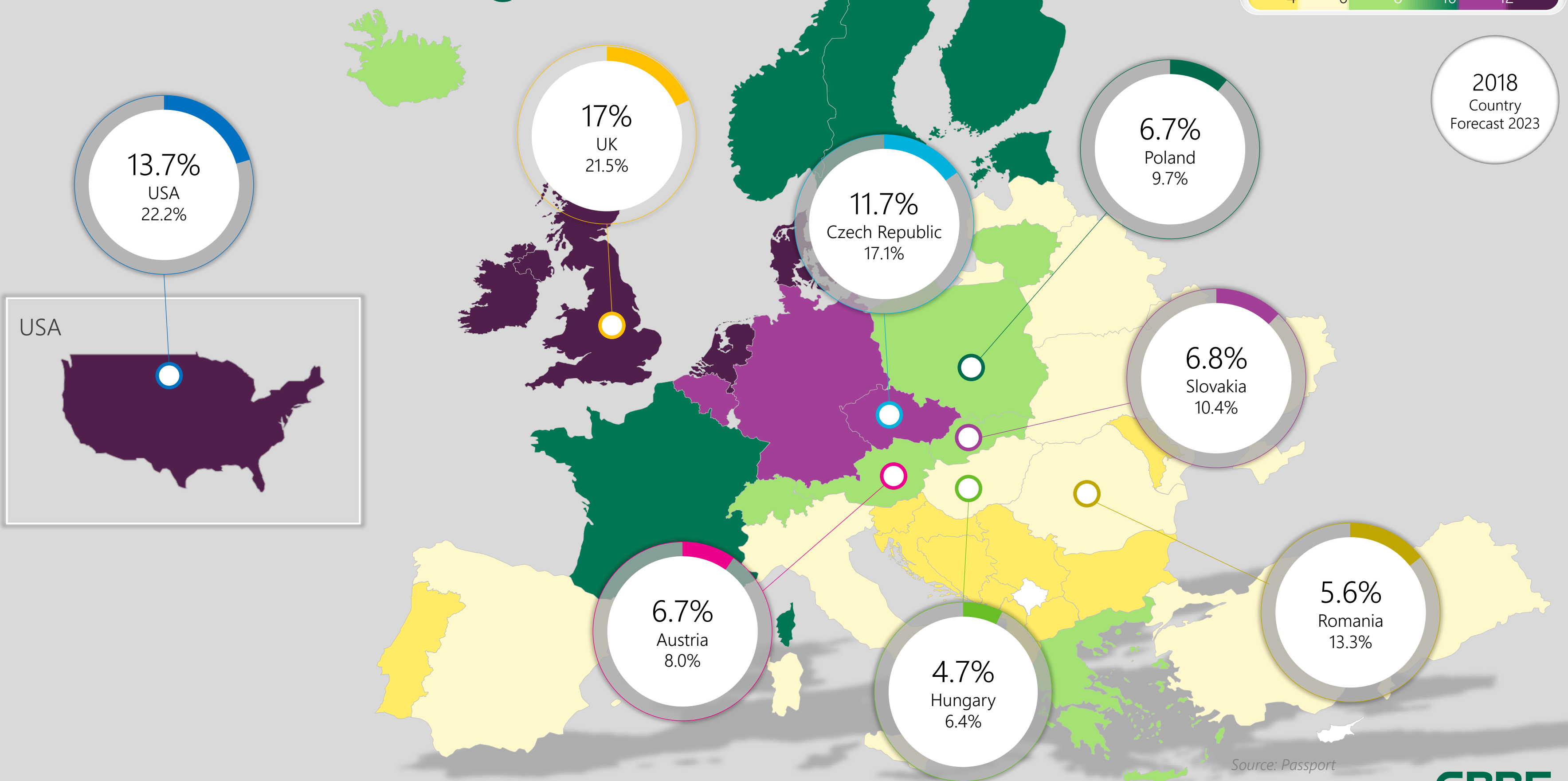
IMMOFINANZ

Internet Retailing in EMEA

Internet retailing %



2018
Country
Forecast 2023



Source: Passport



COSTS

- High and rising labor and delivery costs
- Extremely high return rates



MILLENNIALS

- Digitally native
- Growing spending power
- Rising influence



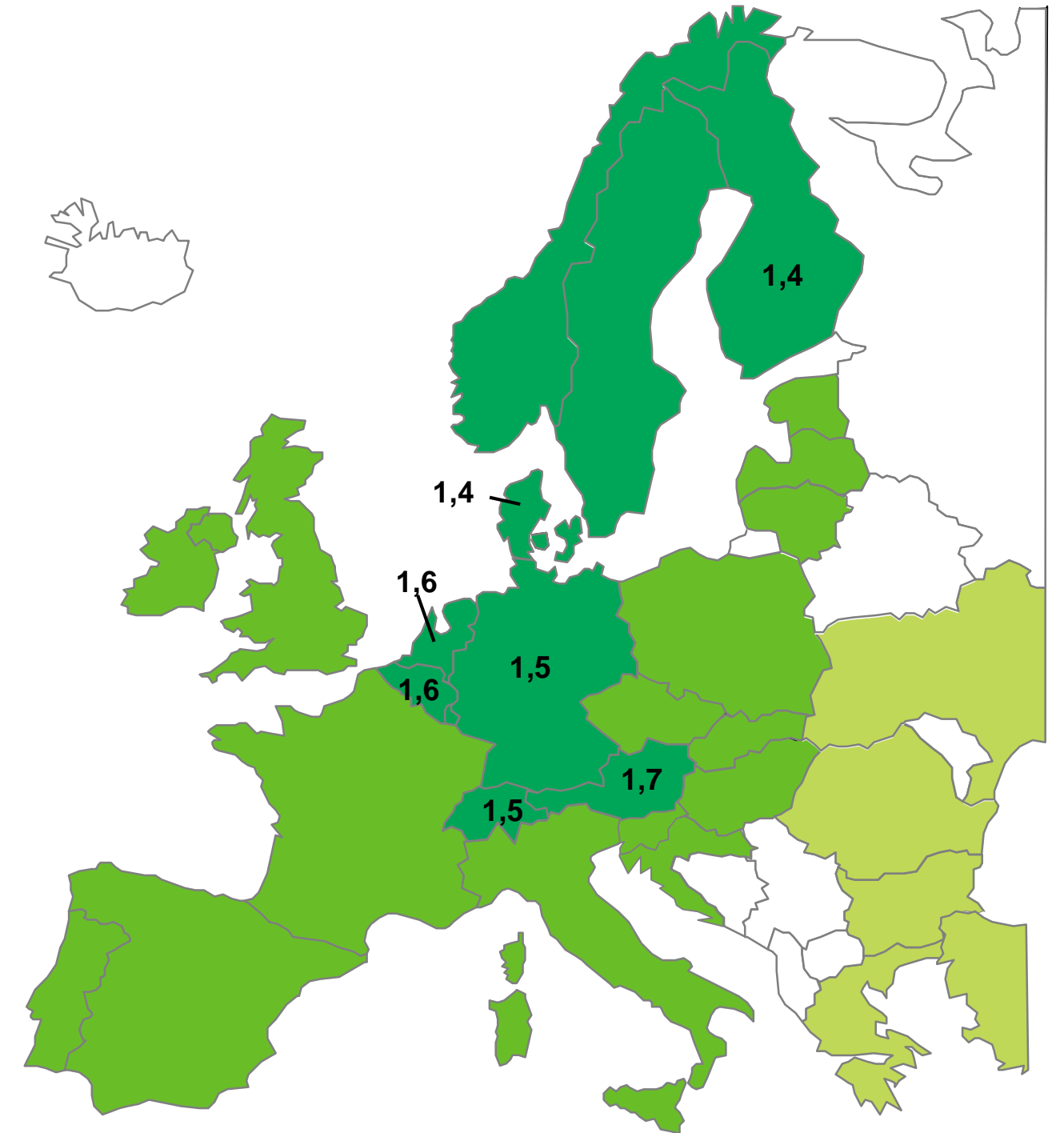
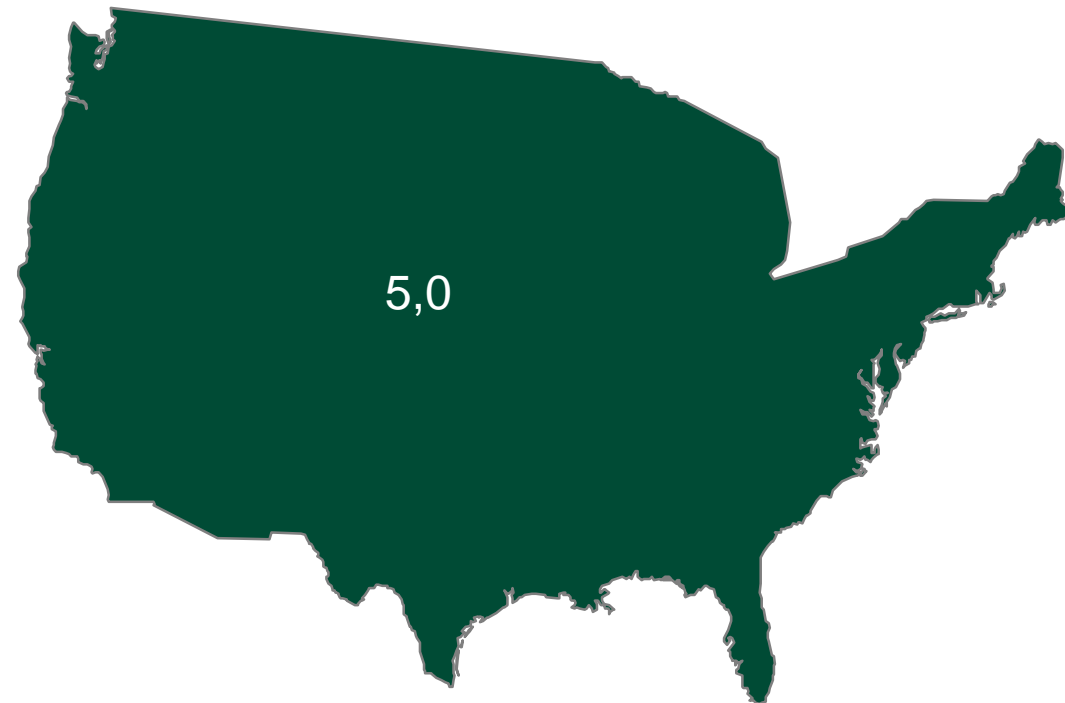
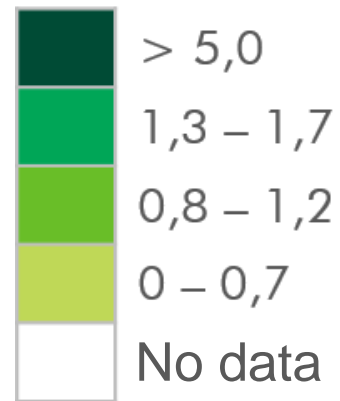
MAJOR TECH PLAYERS

- Major players like Google, Amazon, etc. are pioneering new technologies to enable e-commerce growth in new and existing sectors

RETAIL STOCK: USA VS. EUROPE

SIGNIFICANTLY HIGHER SALES AREA PER CAPITA IN USA

SALES AREA PER CAPITA



SC/RP MARKET SHARE

Number of SC & RP
GLA (sq m)
Market share

USA

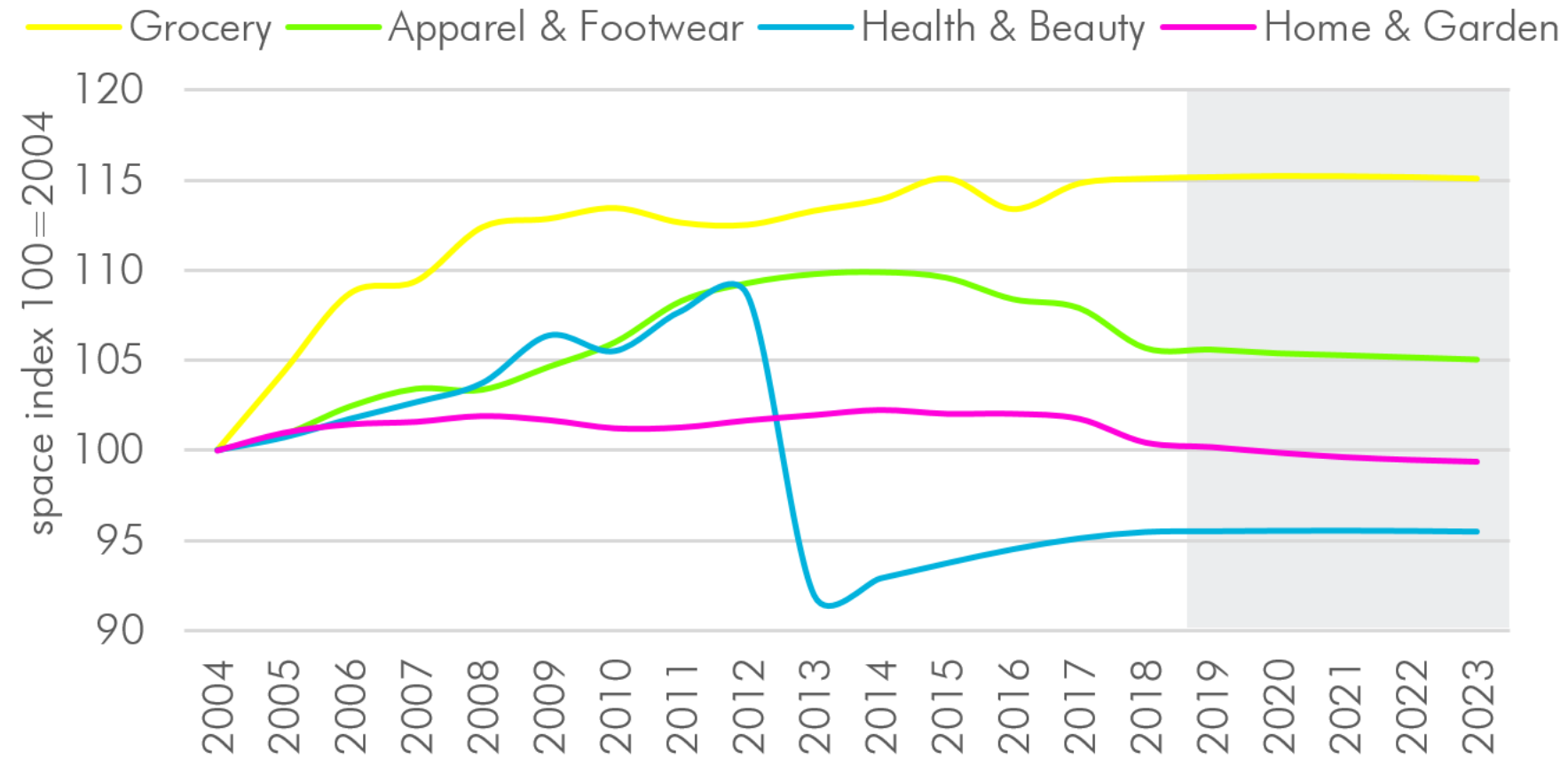
116.000
762 Mio.
76%

AUSTRIA

222
3,8 Mio.
28%

THE OUTLOOK FOR RETAIL PROPERTY AUSTRIA

Space Requirement Development



2018 year-end

Online penetration	6.7%
Retail spend, real, EUR p.c.	6,360
Sales density, EUR/sq m	3,790

Source: Passport & CBRE

Major Indicators

Growth 2018-2023

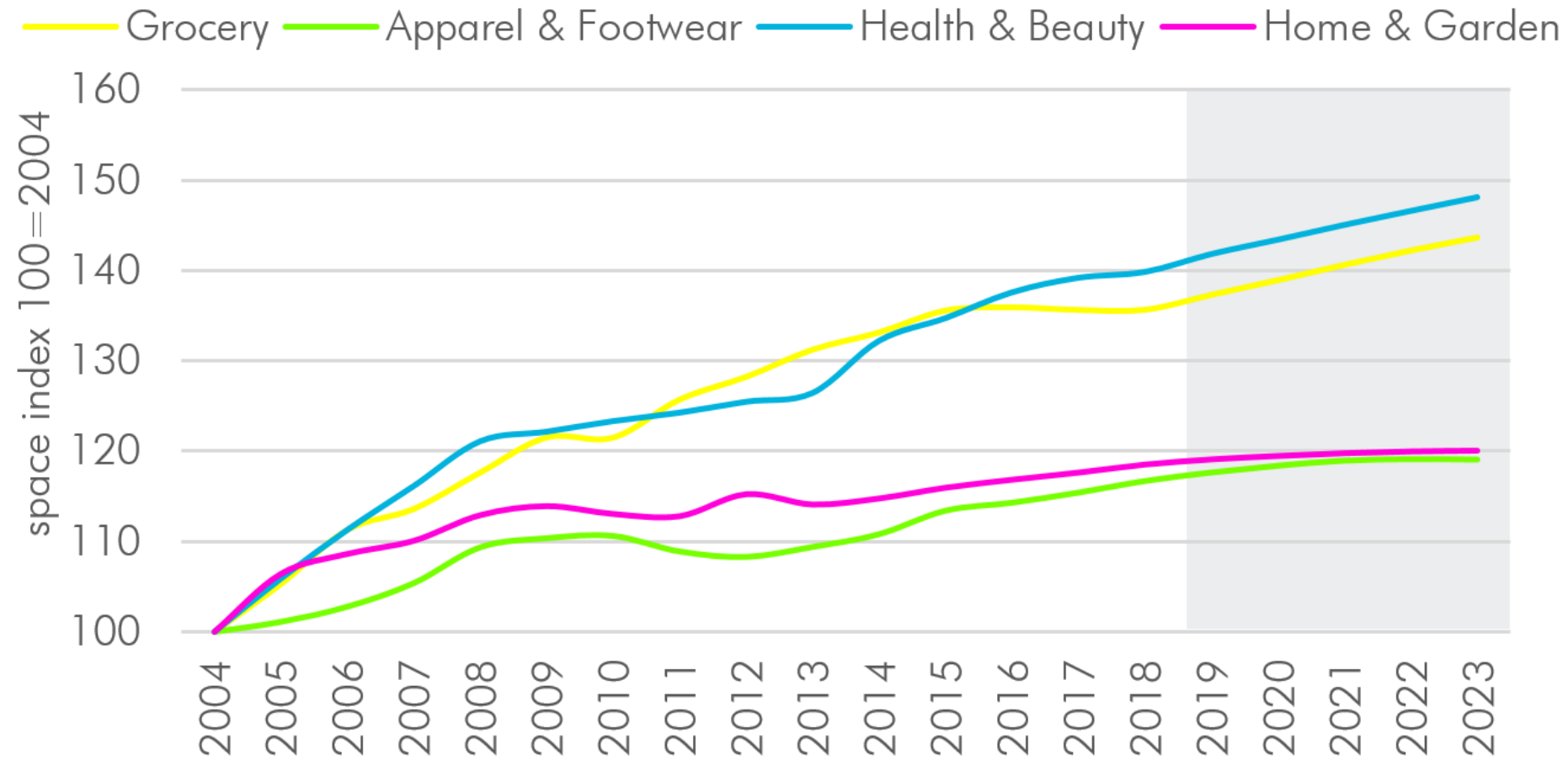
	Sales	Space	E-sales
Grocery	0.0%	0.0%	118%
Apparel	-7.5%	-0.6%	34%
Health	0.0%	0.1%	19%
Home	-4.4%	-1.0%	29%

Growth 2018-2023

Income, personal disposable, real, EUR	5.0%
Population Growth	2.6%

THE OUTLOOK FOR RETAIL PROPERTY CEE

Space Requirement Development



2018 year-end

Online penetration	5.4%
Retail spend, real, EUR p.c.	3,190
Sales density, EUR/sq m	2,520

Major Indicators

Growth 2018-2023

	Sales	Space	E-sales
Grocery	12.6%	5.9%	61%
Apparel	9.7%	2.0%	178%
Health	14.2%	5.9%	24%
Home	12.3%	1.3%	46%

Growth 2018-2023

Income, personal disposable, real, EUR	14.3%
Population Growth	-1.0%

DISCOUNT & CONVENIENCE



EXPERIENCE



OMNI CHANNEL



Source: CBRE

CBRE GmbH | Tegetthoffstraße 7 | 1010 Wien
+43 1 533 40 80 | cbrevienna@cbre.com | www.cbre.at
www.officego.at | www.industrialgo.at | www.living.cbre.at |
www.creativestudio.cbre.at  @CBRE_Austria  CBRE Austria