

Analyses and Strategies for Markets and Locations in Europe

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- Feasibility Studies
- Analyses for Investment and Financing Decisions
- Expert Statements and Consulting in Approval Procedures for large-scale Retail Projects
- Impact Studies according to § 11.3 BauNVO in Germany respective the relevant Laws and Regulations in other Countries
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- Competitive Analyses
- Opinion Research

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- Analyses on Local Retail Supply
- Analyses on Industrial Real Estate Demand

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Preliminary remarks

Beginning in the USA and, over the past 25 years, subsequently spreading in Europe as well, a new retail format has been established: the Factory Outlet Centre (FOC) or Designer Outlet Centre (DOC). In the meantime, such a high density of Outlet Centres already exists in some European countries (e.g. Great Britain), that one can certainly speak of market saturation here. Thus, in Great Britain, as in the USA also, a market shakeout is observable among locations of Outlet Centres, whereby the most professional operators, and accordingly suitable locations, win out over less productive concepts or locations with weaknesses.

The situation in continental Europe is somehow different. Due what are, to date, extremely restrictive building permission procedures compared to those in the rest of Europe, Germany has only a very few Outlet Centres in relation to the size of this national market. However, there is little doubt that this will change in the medium-term perspective, at least. The kind of emotional argument that often used to take place until just a few years ago has now given way to a much more factual discussion on the advantages and disadvantages of establishing an Outlet Centre.

Whereas Germany still shows a lot of potential for new Outlet Centres, Italy has seen a rapid development in the last years, and it's difficult to discover any "white spots" on the map there. The same applies to Switzerland and Austria. In the Central and East European Countries (CEE) the development took up pace but slowed down again in the aftermath of the credit crunch. So still there are significant differences on the development of Outlet Centres and the numbers of such centres in the European countries.

For more than 12 years now, ecostra is publishing this survey on Outlet Centres in Europe. Gathering reliable market-data requires a clear definition of the subject of investigation. Starting with the December 2014 issue, ecostra adapted the definition to new developments in the outlet markets, in particular the up-coming outlet-hybrids (e.g. Value Centres, Outlet Agglomerations). The **new definition of an Outlet Centre** is:¹

*Outlet Centres are an agglomeration of many outlet store units within a coordinately-planned or a spatially-interrelated complex of buildings with more than 5,000 m² retail sales area (= approx. 6,000 m² GLA) and with more than 20 outlet stores. There **brand** manufacturers and vertically-integrated retailers sell past seasons, factory seconds, surplus stock etc. directly to the consumer, without using retail businesses as (intermediate) distributive channels. All products are sold with a discount to the original high-street price of at least 25 %, **whereas double-pricing ("High Street Price" / "Outlet Price") is ruled by the leasing contract. The marketing targets a supraregional area and above all customers from far away are addressed. The coordination, organisation and marketing of an outlet centre is carried out by a centre management.***

The overview presented in this survey includes all those centres that are, currently either in operation or planned, that correspond to the above definition of Outlet Centres. For this reason, the Lifestyle Outlets Myland Crystallerie Wadgassen (www.myland.eu), the 50 Factory Store in the Italian town of Aosta (www.fifty.it) nor, among other sites, the Hackney Walk Luxury Outlet District (www.hackneywalk.com) in London have been included on the list.

At the same time such concepts like Outletcity Metzingen (www.outletcity-metzingen.com) or the City Outlet Bad Münstereifel (www.cityoutletbadmuenstereifel.com)² are not covered by the definition above. Following the request of many brand manufacturers, who were on the search for market data and informations for such projects ecostra now presents with "**Organized Outlet Agglomeration" (OOA)** a definition for such a retail format that does have various features similar to those of an outlet centre but at the same time is different in many aspects. OOA can be distinguished from FOC by the following features:

¹ The new elements in this definition are marked in red colour.

² The City Outlet Bad Münstereifel is the first professionally organized outlet concept using already existing historical buildings in the high streets of a city.



- There is no coordinately-planned or spatially-interrelated complex of buildings. Such common features can refer to some sections of the object, but not the whole. This is most obvious by differences in architecture and missing common functional areas, e.g. heating, storage, waste.
- There are other uses – e.g. services, retail businesses, gastronomy, flats – located between the outlet stores of the OOA. These premises are not necessarily jointly owned by the investor of the OOA nor are they necessarily leased by the operator of the OOA.
- There are public roads, streets and pavements passing through the area where the outlets are located.
- Other than a more or less random agglomeration of outlet stores, an OOA does have a centre-management, which is responsible for marketing and sometimes even for leasing of the object.
- All other features correspond to those of an FOC (see definition above).

The following survey of existing and planned Outlet Centres and Organized Outlet Agglomerations in Europe is intended to help improve transparency on the retail trade market. This survey is free of charge and is available to everyone without any limitations as a PDF-download at the [ecostra](http://ecostra.com)-website. The overview has been compiled according to the best of [ecostra](http://ecostra.com)'s knowledge and is updated approximately every 3 months. Plans, developments or other information disclosed to the authors on a confidential basis have not been included in the overview, in consideration of protection of confidence. No guarantee can be given for the completeness or correctness of the said information.

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Front page

This issues front page shows the "The Mall". The centre is located some 30 km southeast of Florence in an area with a rather poor traffic infrastructure (i.e. small and windy roads, no effective public transport). At the time of opening, on 04th August 2001, the outlet centre consisted of just a few shops with a retail sales area of well below 5,000 m². But already these shops showed a remarkable line-up of premium brands, which was due to the fact, that this centre was realized by the French Kering group (former PPR Pinault-Printemps-Redoute group), which owns most of these brands. Since 2001, "The Mall" was extended with additional buildings of different architecture (some of them with 2 sales-levels), so hardly a coherent concept can be discovered, except of the continuing very exclusive brand mix. The mix of architectural styles somehow resembles the "Outletcity Metzingen" in Germany. The conception shows an outlet village, so the labelling "The Mall" is somehow misleading. As some stores are not included in the signage and store-maps of the centre, it is unclear whether or not they belong to "The Mall" or are free riders (e.g. Hugo Boss, Moncler). Including all the outlet stores the total floorspace of the centre can be estimated to approx. 22,400 m² GLA resp. approx. 16,000 m² retail sales area. Shuttle busses, running every 20 minutes, are connecting the site with Florence. In 2014 the centre had approx. 1.8 m visitors. The centre is operated by the company "Design Management", who according to available information, is owned by the Kering group too.

Additional information requested

If you do have any information on Outlet Centres in Europe that is missing in this survey, you are welcome to provide us with the necessary data. Please, just send us an email with the relevant information. After our review you will find it in the next issue of this market survey.





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Bruganto

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Geislingen

Gdańsk

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Kraków

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Sosnowiec

Warsaw

Wuppertal

Zagreb

Zaragoza

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MEDITERRANEO WIRD FASHION OUTLET BREMERHAVEN




**FASHION
OUTLET**
BREMERHAVEN

OPENING SUMMER 2019



LAGE:

- Erstes deutsches Outletcenter am Meer
- Autobahnen A1/A27
- Umgeben von Touristenattraktionen
- Grundfrequenz 8 Mio. Passanten p.a.

ARCHITEKTUR:

- Mediterraner Village-Stil (überdacht)
- Ca. 50 Shops
- Ca. 10.000 qm (GLA)
- 1.200 Parkplätze (insgesamt 2.700 mit Parkhaus "Havenwelten")



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IMMOBILIEN

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- Entwicklung - Management - Vermietung



GoOutlet!

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| Location | Type | Status | Name of the Object / Project | Operator | Developer / Investor / other Partners | Gross Leasable Area (GLA) in m ² | Retail Sales Area (SA) in m ² | Remarks | |
|-------------------------|------|-------------------------|------------------------------|-------------------------------------|---|--|--|---|--|
| Pohlheim (Hesse) | FOC | early planning phase | Limes The Style Outlets | Neinver | FS Entwicklungsgesellschaft Mittelhessen GmbH / Neinver | 17.000 | 13.500 | In the industrial area "Garbenteich-East", which is located in immediate proximity to the motorway A5, an Outlet Center is planned. The project was presented at the end of October 2017 at a special meeting of the Pohlheim town council. A citizens action group has formed to oppose the project because of the expected traffic. The city of Giessen already announced to oppose this project too. In April 2018 an impact study, ordered by the city of Giessen, was presented. This impact study came to the result, that this planned outlet centre will severely damage the surrounding city centres. In August 2018 a citizens vote was carried out but failed to reach the limit of 25 % of the local constituency voting. | |
| Bremerhaven (Bremen) | FOC | advanced planning phase | Fashion Outlet Bremerhaven | 1A Outlet GmbH | AVW Immobilien AG | 10.000 | 9.000 | In the harbour area of the city of Bremerhaven, closeby to the city center, 2008 a shopping centre opened, that was designed in the Tuscany village style. The name was "Mediterraneo". Since the start the shopping centre failed to meet expectations and showed an increasing number of vacancies. In January 2019 press reports indicated that the Mediterraneo will be rebranded and turned into an outlet centre. Opening is scheduled for summer 2019. According to available information, the city administration is welcoming this development. | |
| Greece | | | | | | | | | |
| Attiki (Athens) | Odos | FOC | operating | Factory Airport | Factory Outlet S.A. | Elmec Sport S.A. | 14.000 | 13.000 | Located in a retail park (next to IKEA) near Athens Airport |
| Piraeus | | FOC | operating | Factory Pireos | Factory Outlet S.A. | Elmec Sport S.A. | 13.000 | 12.000 | Approx. 300 parking spaces |
| Yalou (close to Athens) | | FOC | operating | McArthurGlen Designer Outlet Athens | McArthurGlen | McArthurGlen Group / Bluehouse Capital Advisor Ltd | 21.240 | 18.400 | Village Centre with 2 sales levels and underground parking. Opened 02nd June 2011; approx. 2,400 parking spaces |
| Lavrio | | FOC | cancelled | Lavrio Village Company Store | Europ Invest Management S.r.l. | Europ Invest | | 25.000 | An application for building permission has been made. Opening was planned for 2010, but construction work didn't start yet. 2800 parking spaces. |



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|--------------------------------|------|-----------|------------------------------|----------------------------|---------------------------------------|---|--|--|
| Thessaloniki | FOC | operating | One Salonica Outlet Mall | | | 17.500 | 15.000 | Located at the west of Thessaloniki. Multi-storey building with outlet stores on 2 sales levels. Approx. 60 outlet stores. In the basement there is a Carrefour Hypermarket located. Approx. 1.000 parking places. |
| Larissa | FOC | operating | Fashion City Outlet | Sonae Sierra | Bluehouse Capital | 20.000 | 16.000 | Relaunch of the former "Pantheon Plaza". The centre will also encompass a supermarket (1,600 m ²), a large Media Market and a cinema (1,900 m ²). Approx. 1,600 parking spaces. Opening took place at 15th November 2018. |
| Hungary | | | | | | | | |
| Törökbálint (west of Budapest) | FOC | closed | GL Outlet Center | GL Outlet | Group GL | 16.500 | 15.000 | Project opened in November 2004. However, due to location disadvantages and conceptual planning weaknesses, the centre was not able to compete with the neighbouring Premier Outlets Center in Biatorbágy and closed down operations at the beginning of 2011. The centre is now occupied in part with offices of the local city administration. But large parts are standing empty. |
| Biatorbágy (west of Budapest) | FOC | operating | Premier Outlet | ROS Retail Outlet Shopping | DWS / RREEF Investment GmbH | 23.520 | 20.000 | Project opened in November 2004. The 3rd construction phase was completed in August 2007. In 2015 the centre was sold by AVIVA Central European Property Fund to Lone Star Real Estate Fund III. At the end of 2016 the centre management moved from Jones Lang LaSalle to ROS. In 2018 the centre was sold to the DWS fund "Grundbesitz Europa". Approx. 1,780 parking spaces. |
| Budaörs (west of Budapest) | FOC | closed | M1 Outlet Center | Óbuda-Újtlak | FTB Invest Kft. | | 16.500 | Located in immediate proximity to the Premier Outlets Center in Biatorbágy. The centre was more a mixture between an OC and a traditional shopping centre. Due to the severe competition, it failed and closed again. The centre is now standing empty! |
| Polgár | FOC | operating | M3 Outlet Center | Jones Lang LaSalle | BTZ Kft. / M3 Outlet Service Kft. | 10.900 | 9.500 | Located at the M3 motorway in Eastern Hungary, between Miskolc and Debrecen. Opened on 17th May 2008. On 1st May 2012 management changed from Jones Lang LaSalle (JLL) to the developer's management company. In October 2013 JLL was entrusted with the management again. |



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|-------------------------|------|-----------|---|-------------------------|---|---|--|---|
| Ireland | | | | | | | | |
| Killarney | FOC | operating | Killarney Outlet Centre | European Outlet Markets | Green Property | 7.000 | 6.500 | |
| Rathdowney | FOC | closed | Rathdowney Shopping Outlet | Morrison Developments | Morrison Developments / AWG | 7.500 | 6.800 | Centre was closed in May 2012. |
| Kildare | FOC | operating | Kildare Village | Value Retail | Hammerson Plc. / Value Retail | 16.800 | 13.500 | Project was opened in July 2006. Construction work started in 2014 for a 5,540 m ² GLA extension in phase II. Opening of phase II took place in November 2015. In January 2018 Value Retail was granted planning permission for phase III which will add another 8,000 m ² GLA to the centre. |
| Dundalk | FOC | cancelled | Ballymac Village Factory Outlet Centre | n.s. | Coverfield Developments Ltd. / ING Real Estate Developments | | 15.500 | Building permission was granted in October 2004. Construction work has begun, but due to judicial proceedings the completion and opening originally planned for September 2006 was delayed; at the end of 2006, the project was abandoned by the operators due to the delays |
| Dunleer | FOC | cancelled | n.s. | | Donal Kinsella | | 10.000 | Completion is unlikely due to the development of the competition and the developer's lack of experience |
| Dublin | FOC | cancelled | City West | n.s. | Jim Masefield | | n.s. | Up-to-dateness of information uncertain. Project possibly abandoned. |
| Italy | | | | | | | | |
| Serravalle (San Marino) | FOC | closed | One Gallery Outlet | n.s. | San Marino Factory Outlet Srl | 8.000 | 5.000 | According to available information, the "San Marino Factory Outlet" centre closed doors in April 2015. In March 2016 the centre was reopened as "One Gallery Outlet". 2 sales-levels and 700 parking spaces. ATrony electronics mega-store was added to the centre. In April 2017 insolvency proceedings were implemented. According to available information, the centre is closed for good. |
| Serravalle Scrvia | FOC | operating | McArthurGlen Designer Outlet Serravalle | McArthurGlen | McArthurGlen Group / TH Real Estate | 50.650 | 35.700 | Opened September 2000; approx. 4,250 parking spaces. Enlargement by approx. 12,260 m ² SA took place in phase IV in 2016. |
| Bergamo | FOC | closed | La Galleria Factory Outlet Center | Morrison Developments | Buontempo | 14.000 | 12.000 | Opened in 2003; approx. 1,100 parking spaces. In the meantime, the centre has been turned into a classical shopping centre. |



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|-------------------------------------|------|-----------|---------------------------------|-------------------------------|---|---|--|---|
| Fidenza | FOC | operating | Fidenza Village | Value Retail | Hammerson Plc. / Value Retail | 20.900 | 16.500 | Opened in 2003. Approx. 1,700 parking spaces. The centre was enlarged by approx. 3,300 m ² GLA due in 2017. |
| Rodengo Saiano (close to Brescia) | FOC | operating | Franciacorta Outlet Village | Multi Outlet Management Italy | Blackstone Group L.P. / European Fashion Centres | 32.660 | 28.000 | Opened in October 2003; enlargement by approx. 7,800 m ² is planned; approx. 3,000 parking spaces. In September 2013 the centre was sold by DEGI Deutsche Gesellschaft für Immobilienfonds mbH to Blackstone. In 2017 plans were announced to extend the centre by an additional 5,000 m ² GLA. |
| Castel Guelfo di Bologna | FOC | operating | Castel Guelfo The Style Outlets | Neinver | Neinver / TIAA-Henderson Real Estate / ING Real Estate | 24.500 | 22.900 | Opened in May 2004; approx. 1,970 parking spaces. Centre was taken over by Neinver in June 2008. The centre was sold in 2016 as a part of a package deal from IRUS European Property Fund to Neinver / TH Real Estate. |
| Castel Romano (close to Rome) | FOC | operating | Castel Romano Designer Outlet | McArthurGlen | McArthurGlen Group / Henderson Global Investors / EOMF | 31.200 | 28.000 | Opened in October 2003. Last extension with approx. 7.300 m ² SA was opened in April 2013. Approx. 2,200 parking spaces. Currently there are plans for the next extension. |
| Valmontone (close to Rome) | FOC | operating | Valmontone Outlet | Promos S.r.l. | Deutsche Asset & Wealth Management | 40.190 | 34.000 | Opened in 2003; approx. 3,500 parking spaces; 157 shops. Located in a tourist area 50 km from downtown Rome. In Valmontone also there is the Rainbow MagicLand amusement park, which opened in 2011. |
| Bagnolo San Vito (close to Mantova) | FOC | operating | Mantova Outlet Village | Multi Outlet Management Italy | Idea Fimit (MOMA) / Blackstone Real Estate Partners IV | 25.070 | 21.250 | Opened in 2003; approx. 3,000 parking spaces; approx. 2.7 million visitors in 2013. The centre was sold in 2014 as part of a package deal from Fashion District Group to Idea Fimit (MOMA) / Blackstone Real Estate Partners IV. With it the management changed from Fashion District to Multi. |
| Santhia (between Milan and Turin) | FOC | closed | Fashion District Santhia | Fashion District | | | 14.500 | Standing vacant. Project built but never opened! |
| Foiano della Chiana | FOC | operating | Valdichiana Outlet Village | Multi Outlet Management Italy | Gruppo Percassi / Blackstone Real Estate Partners Europe IV | 31.000 | 20.000 | Opened in July 2005; approx. 3,500 parking spaces. In 2014 the centre was sold from Aberdeen to Blackstone. |





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| Location | Type | Status | Name of the Object / Project | Operator | Developer / Investor / other Partners | Gross Leasable Area (GLA) in m ² | Retail Sales Area (SA) in m ² | Remarks |
|-------------------------------|------|-----------|--|-------------------------------|--|---|--|---|
| Molfetta (close to Bari) | FOC | operating | Puglia Outlet Village | Multi Outlet Management Italy | Idea Fimit (MOMA) / Blackstone Real Estate Partners IV | 37.920 | 33.000 | Opened in 2005; in construction phase III, the centre was enlarged to approx. 33,000 m ² SA in 2013; approx. 2,500 parking spaces; approx. 2.3 million visitors in 2013. In the outlet centre, there is a Multiplex cinema. At present, besides the OC, plans are underway to also establish a theme park ("Miragica - Terra di Giganti") and hotels |
| Barberino di Mugello | FOC | operating | McArthurGlen Barberino Designer Outlet | McArthurGlen | McArthurGlen Group / EOMF / Gruppo Fingen | 26.710 | 23.000 | Opened in March 2006; approx. 2,600 parking spaces. In 2013, the centre had 3 million visitors. The 2nd building phase opened in March 2014. |
| Vicolungo (Piemont) | FOC | operating | Vicolungo The Style Outlets | Neinver | Neinver / TIAA-Henderson Real Estate | 34.200 | 31.000 | Location between Milan and Turin at the intersection of the A26 / A4. Opened in October 2004; construction phase III with an additional 3,700 m ² opened 2010. 141 shops and 3,450 parking spaces. The centre was sold in 2016 as part of a package deal from IRUS European Fund to Neinver / TH Real Estate. Currently modernization measures are on the way which will be finished by spring 2019. |
| Aiello del Friuli (Palmanova) | FOC | operating | Palmanova Outlet Village | Multi Outlet Management Italy | Promos Srl / Blackstone | 22.000 | 15.000 | Opened in May 2008; approx. 80 shops and 2,500 parking spaces. In 2013, approx. 3 million visitors. Plans are currently underway to extend the centre by an additional 9,000 m ² GLA. The centre was sold in 2015 from Promos Srl to Blackstone Real Estate Partners Europe IV. With it the management changed from Promos to Multi. |
| Brennero (South Tyrol) | FOC | operating | Outlet Center Brenner | OCB Service GmbH | Outlet Center Brenner GmbH / Invesco | 15.500 | 14.270 | Opened on 30.11.2007. Located in the town-center of Brenner, in immediate proximity to the Austrian border and closeby to the most important motorway crossing the alps. In October 2012 an MPreis-Supermarket was added to the centre. Enlargement in a 3rd building phase opened in autumn 2017. Approx. 1,200 parking spaces. The centre is opened on Sundays throughout the year. |
| Sestu (Sardinia) | FOC | operating | Sardinia Outlet Village | Cogest Retail Ltd | Gruppo Policentro S.r.l. / Cogest Italia S.r.l. | 29.700 | 15.000 | Opened in April 2006; approx. 3,000 parking spaces. Part of the "La Corte del Sole" shopping centre with a floorspace of approx. 120,000 m ² in total. A hotel and a cinema are integrated in the centre too. |



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|------------------------------------|------|--------------------|---|---------------------------|--|---|--|--|
| Mondovi (Piemont) | FOC | operating | Mondovicino Outlet Village | Tavolera S.r.l. | Viot Cerea S.r.l. / Tavolera S.r.l. / Gelmetti | 18.000 | 15.000 | First construction phase, with approx. 60 shops, opened on 16th April 2008; approx. 24,500 m ² SA are planned in the final enlargement; approx. 4,700 parking spaces |
| Sant Oreste (close to Rome) | FOC | under construction | Roma Outlet Village | Arcus Real Estate Srl | Gruppo Percassi / Arcus Real Estate | 35.000 | 30.000 | The centre was formerly promoted under the name "Soratte Outlet Shopping". 2,500 parking spaces. Bought by Gruppo Percassi the centre will reopen at the end of 2019 under Arcus Real Estate management. |
| Villesse (Friaul) | FOC | cancelled | n.s. | Bernardi | | | n.s. | Up-to-dateness of information uncertain. Project possibly abandoned. |
| Citta Sant' Angelo | FOC | operating | Citta Sant' Angelo Village | CBRE | Citta Sant Angelo Outlet Village Spa | 25.500 | 20.000 | OC opened on 24.09.2009; an enlargement was realized in 2013. Another extension is planned in phase 3. Approx. 4,000 parking spaces |
| Pescara | FOC | cancelled | Martinsicuro Shopping Outlet | n.s. | | | 20.000 | According to the available information, the project has been abandoned again! |
| Ronchis (close to Udine) | FOC | cancelled | GLI Arsenali Outlet Shopping | Stores Development S.r.l. | GLI Arsenali / Cesi Srl Boldrin Spa | | 30.000 | Project abandoned. |
| Marcianise (close to Naples) | FOC | operating | McArthurGlen La Reggia Designer Outlet | McArthurGlen | Gruppo Fingen / Gianni Carità e Figli S.r.l. / Studio GM / Espansione Commerciale S.r.l. | 26.785 | 25.000 | Project was opened in February 2010. Enlargement took place in construction phase II in October 2011. Approx. 157 shops, approx. 2,500 parking spaces. A solar collector which covers 30% of the centre's energy needs is installed on 2,700 m ² of the roof surfaces. Extension with 5,000 m ² GLA is due to open in 2018. |
| Noventa di Piave (close to Venice) | FOC | operating | McArthurGlen Noventa di Piave Designer Outlet | McArthurGlen | McArthurGlen Group / Gruppo Spa / Simon Property Group | 32.000 | 23.000 | Project opened in September 2008; approx. 3,500 parking spaces. Enlargement by approx. 7,100 m ² GLA in construction phase 3 was opened in March 2012. Since January 2012 the centre has the permission for Sunday opening. In November 2015 construction work for phase 4 started, which added another 6,100 m ² GLA. Opening of phase 4 was in 2016. There are already plans for the next extension. |



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|---|------|-----------|---------------------------------|-------------------|---|---|--|---|
| Leccio Reggello (close to Florence) | OOA | operating | The Mall | Design Management | Kering | 22.400 | 16.000 | Opened on 04th August 2001 at a site with only poor location factors in a small town approx. 30 km southeast of Florence with just a few line of shops, but still a very exclusive brand line-up. In the meantime the centre was extended with additional buildings of different architecture, so hardly a coherent concept can be discovered, except of the continuing very exclusive brand mix. Shuttle busses, that are running every 20 minutes, are connecting the site with Florence. In 2014 approx. 1.8 m visitors. |
| Roncade (Trevi- so) | FOC | cancelled | L'Arsenale Contemporary Outlet | Lefim S.p.A. | Gruppo Basso | | 18.000 | Building was completed years ago; however, the opening was delayed again and again. During the construction phase, the project was marketed under the name "Roncade Outlet Gallery". The attempt to realize an outlet centre there was given up now. The existing building is now supposed to be relaunched as a shopping centre with the themes Art & Design, Fashion, Events and Food and the new name "L'Arsenale Contemporary Shopping". |
| Calatabiano (close to Taormina, Sicily) | FOC | cancelled | Naxos Fashion Garden | | CMC Ravenna / Larry Smith Italia S.r.l. / Brand Partners Retail Development Srl | 28.000 | 25.000 | Building permission and trading license have been obtained in 2009. It is possible to enlarge by approx. 30,000 m ² SA to reach 55.000 m ² SA. The developer was on the search for investors since years. Obviously without any success. As nothing happend since years, it can be assumed that this project was cancelled. |
| Crespina (close to Pisa) | FOC | cancelled | Pisa Outlet Village | Promos S.r.l. | | 18.000 | 15.500 | Approx. 2,500 parking spaces; opening was planned for the second half of 2012 but had to be postponed. In the meantime it seems that this project was cancelled. |
| Melilli (Siracusa) | FOC | closed | Fashion District Melilli Outlet | n.s. | Tecnall S.r.l. / UniCredit | 24.000 | 20.000 | 1st construction phase opened on 11th November 2010. In a 2nd construction phase, the OC is to be enlarged to approx. 30,000 m ² . Approx. 2,500 parking spaces. Centre was taken over by Promos in April 2011 (former operator / investor was Fashion District). In November 2012 Promos cancelled its cooperation. Some months later, the centre was closed in 2013. |



| Location | Type | Status | Name of the Object / Project | Operator | Developer / Investor / other Partners | Gross Leasable Area (GLA) in m ² | Retail Sales Area (SA) in m ² | Remarks |
|---|------|----------------------|---|----------------------------|---|---|--|---|
| Grisignano (between Vicenza & Padova) | FOC | cancelled | Fashion District Grisignano | Fashion District | | 30.000 | 24.000 | Approx. 2,500 parking spaces. Opening of the 1st construction phase (approx. 20,000 m ² SA) was planned for end of 2010. Nothing happened yet. Projekt is probably abandoned. |
| Vicovaro (north-east of Rome) | FOC | early planning phase | Vicovaro Roma Outlet | n.s. | Parsitalia Real Estate S.r.l. | | 25.000 | Located on the A24 motorway; approx. 2,500 parking spaces |
| Agira (Sicily) | FOC | operating | Sicilia Village Outlet | Arcus Real Estate Srl | Gruppo Percassi / Arcus Real Estate | 30.000 | 25.000 | Located at the motorway A19 (Palermo - Catania). Opened on 26.11.2010 with approx. 26,000 m ² GLA. An additional 4,000 m ² GLA was opened in July 2014 in construction phase II. Now, in phase III another 6,000 m ² GLA are scheduled to open in 2018. Approx. 3,000 parking spaces |
| San Nicola Varco - Eboli (close to Salerno) | FOC | operating | Cilento Village Outlet | Irgenre S.r.l. | Irgenre S.r.l., Banca Intesa / Banco di Napoli e Monte di Paschi di Siena / Promos S.r.l. | 24.000 | 17.000 | Located on the A9 Salerno - Reggio Calabria motorway; approx. 3,000 parking spaces. Enlargement to approx. 34,000 m ² GLA is planned in construction phase II. The centre is open Sundays all year round. Construction began November 2010. Centre was opened on 15th December 2012. |
| Settimo Torinese (Piemont) | FOC | operating | Torino Village Outlet | Arcus Real Estate Srl | Gruppo Percassi / Arcus Real Estate | 19.500 | 16.500 | Located north of the city of Turin between the motorway A4 and the national road SS11. Opening took place at 23rd March 2017. In phase II an additional 10,500 m ² GLA are planned. Approx. 2,500 parking spaces (covered parking in the basement of the centre). |
| Brugnato (La Spezia) | FOC | operating | Shopinn Brugnato 5 Terre Outlet Village | ROS Retail Outlet Shopping | San Mauro SpA / Gruppo Cariparma / Crédit Agricole / SDA Bocconi MAFED | 19.000 | 16.000 | Located at the motorway between Genova and Livorno. Approx. 1,000 parking spaces. Opening took place on 10th April 2014. In summer 2015 the centre management moved from Freeport to ROS Retail Outlet Shopping. |
| Reggello-Leggio (Firenze) | FOC | closed | Smart Gallery | n.s. | Arcoretail | 7.000 | 6.000 | Opened at 19th November 2011 as Fashion Valley, later re-named as Smart Gallery. The centre always had a rather high vacancy rate. It closed doors in October 2015. |



| Location | Type | Status | Name of the Object / Project | Operator | Developer / Investor / other Partners | Gross Leasable Area (GLA) in m ² | Retail Sales Area (SA) in m ² | Remarks |
|--|------|----------------------|-----------------------------------|------------------------|--|---|--|---|
| Fiumicino (close to Rome) | FOC | uncertain | MID Fiumicino Outlet | n.s. | UNI.ONE Srl / Merlino Progetti / Larry Smith Srl | 29.000 | 24.000 | Located on the Rome – Fiumicino motorway. 130 shops. Opening was planned for 2013, but there is no information so far, that construction work has started. |
| Locate di Triulzi (close to Milan) | FOC | operating | Scalo Milano Outlet & more | Locate District Spa | Lacate District Spa (Lonati Group) | 31.400 | 25.000 | Located 15 minutes south of Milan city centre. This project was announced by Promos at the MAPIC 2012. The outlet center is part of a multi-use complex (outlet centre, food village, lifestyle centre) with altogether approx. 60,000 m ² GLA. Approx. 130 stores and approx. 4.000 parking spaces. Building permit was issued at 10th March 2014. Opening took place on 27th October 2016. New development phase planned for 2019 to add 25 stores with 4.000 m ² GLA. |
| San Giovanni in Persiceto (close to Bologna) | FOC | cancelled | n.s. | McArthurGlen | Villa Conti Srl / Pirani-Group | 20.000 | 17.000 | In September 2013 Investor withdraw from the project due to resistance from regional retailers and - according to available information - limitations in the location factors. |
| San Pellegrino (north of Bergamo) | FOC | early planning phase | San Pellegrino Outlet | Arcus Estate Srl | Gruppo Percassi / Arcus Real Estate | 13.000 | 10.000 | Located at the Dalmine exit on the A4 motorway. Approx. 1,500 parking spaces. |
| Occhiobello (Venetia) | FOC | operating | DeltaPo Family Destination Outlet | Occhiobello Outlet srl | K-Board e Costruzioni Generali Italiane / GEM Retail | 17.745 | 15.000 | Construction work for the "Occhiobello Outlet Village" started in March 2011. But due to the economical crisis there was a lack of demand for outlet space. Opening was delayed again and again. In 2016 the concept was revised and the project renamed to "DeltaPo Family Destination Outlet". The concept was changed to "retailtainment" and the outlet stores will be completed by - among others - a museum, wellness, hotel, fitness, cinema and educational facilities. Opening took place on 12th April 2017. Still, a lot of outlet stores are vacant. In a later phase, additional 12,000 m ² GLA of outlet stores are planned. |
| Biella (Piemont) | OOA | cancelled | Biella Factory Stores | n.s. | Aossociazione 015 Biella | 7.000 | 5.500 | In the city centre of Biella, the first inner city outlet centre in Italy was planned, converting empty shops to outlet stores. The local retail association was actively looking for someone to lease and operate the project, but obviously wasn't successful. |

