



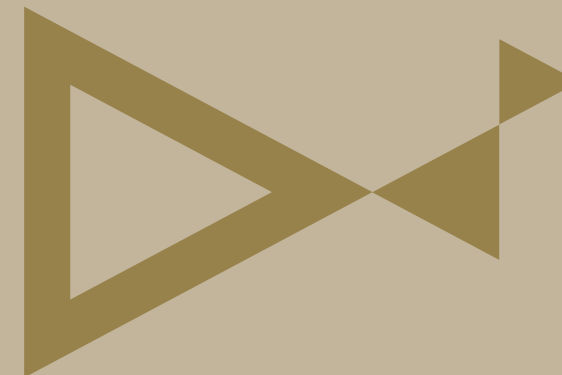
ADDIRIYAH FESTIVAL CITY MALL

EXPERIENCE THE WORLD



الدرعية فستيفال سيتي
Addiriyah Festival City





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OMAR AL FUTTAIM
VICE CHAIRMAN, AL-FUTTAIM

“ADDIRIYAH FESTIVAL CITY WAS BORN OUT OF THE VISION OF BRINGING A WHOLE NEW RETAIL AND LIFESTYLE CONCEPT TO SAUDI ARABIA.

AS THE BIGGEST MALL OF ITS KIND IN THE COUNTRY, IT COMBINES AN INNOVATIVE, VIBRANT AND TRULY MODERN SHOPPING EXPERIENCE WITH ITS INSPIRED AND PROUD ORIGINS.

ONE THAT REDEFINES IT AS AN ICONIC LANDMARK.”





OVERVIEW







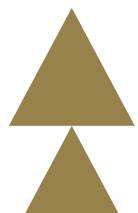
SAUDI ARABIA

OPEN TO FUTURE POSSIBILITIES.



The Kingdom of Saudi Arabia is the largest Arab state across Western Asia. It is the world's second largest producer and exporter of oil, owning 18 per cent of the world's proven petroleum reserves.

It is the GCC's biggest market with a booming retail sector reached a value of SAR 276 billion by the end of 2014, which accounts for 17 per cent of Saudi Arabia's gross domestic product (GDP).

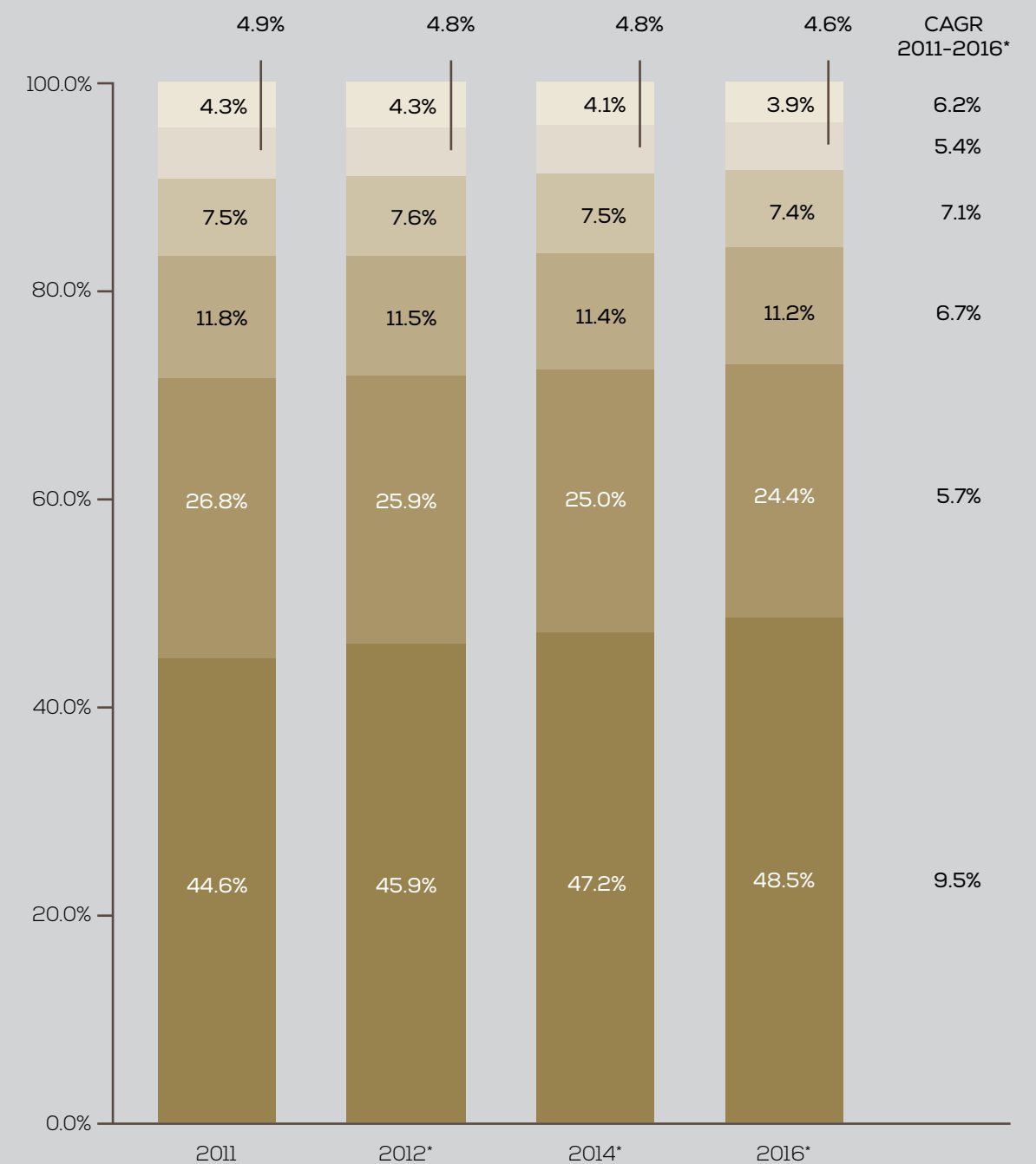


THE GROWING RETAIL MARKET

The Kingdom of Saudi Arabia was ranked 16th in the Global Retail Development Index 2014, but is the largest in the GCC. Its share is expected to increase from 45 per cent in 2011 to 49 per cent in 2016. Travel restrictions create high spend levels within the country and there's a growing middle class that contributes hugely to the growing retail market.



GCC COUNTRY CONTRIBUTION TO THE RETAIL MARKET

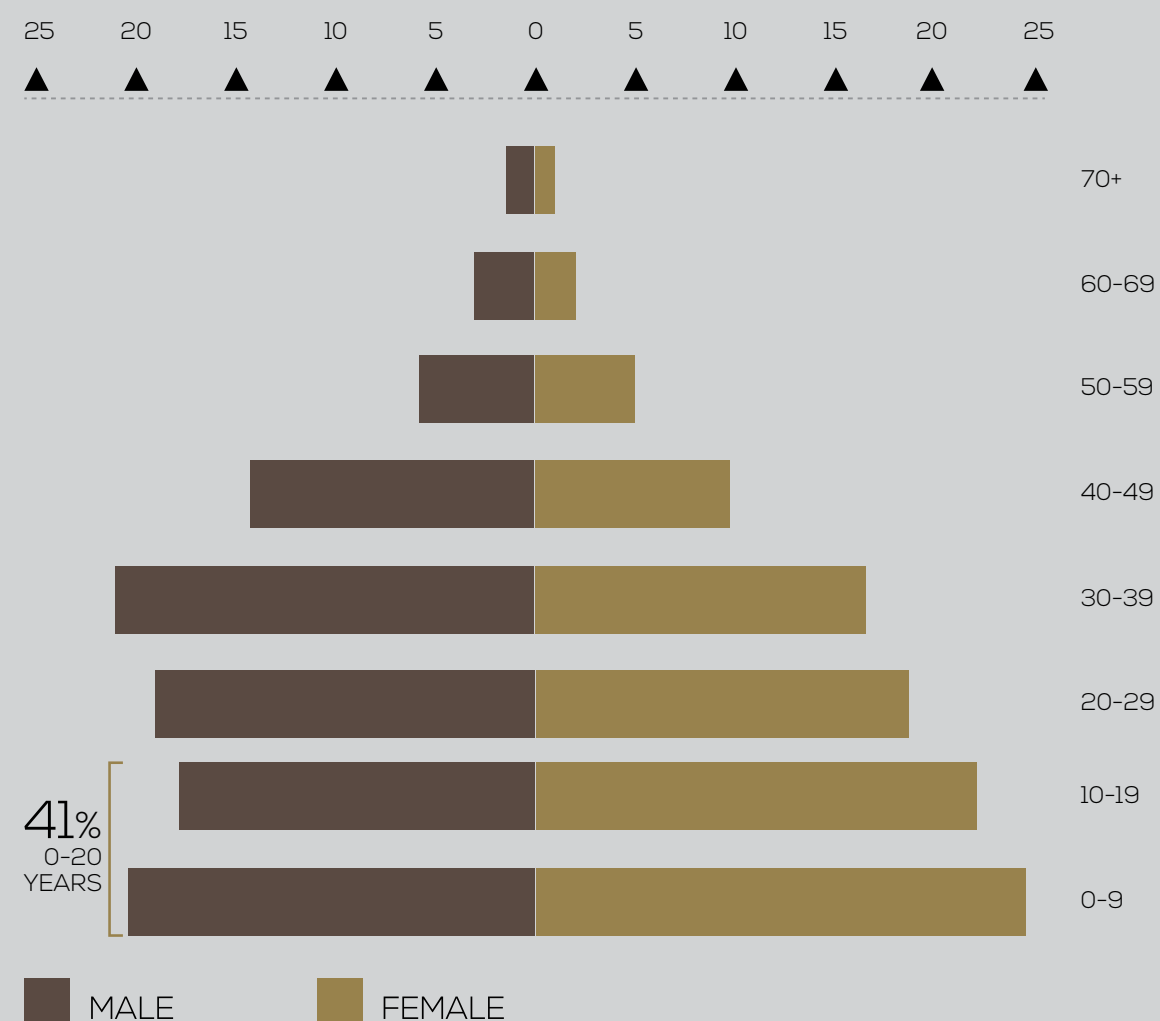


KSA RESIDENT POPULATION %

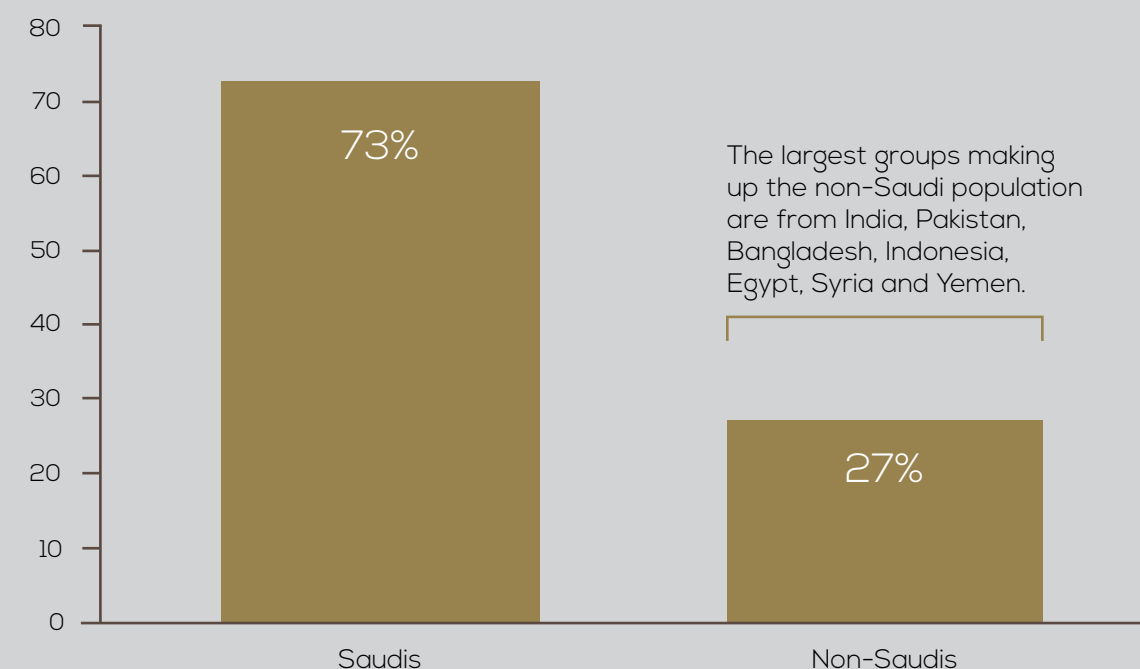
QUANT SURVEY

The population of the Kingdom of Saudi Arabia is forecast to grow significantly, particularly from 2010 to 2030, where it is expected to reach 37.6 million, based on a CAGR of 1.13 per cent. However, the population of Riyadh is forecast to reach 7.4 million by 2025, which is a faster growth rate than the overall population of the Kingdom.

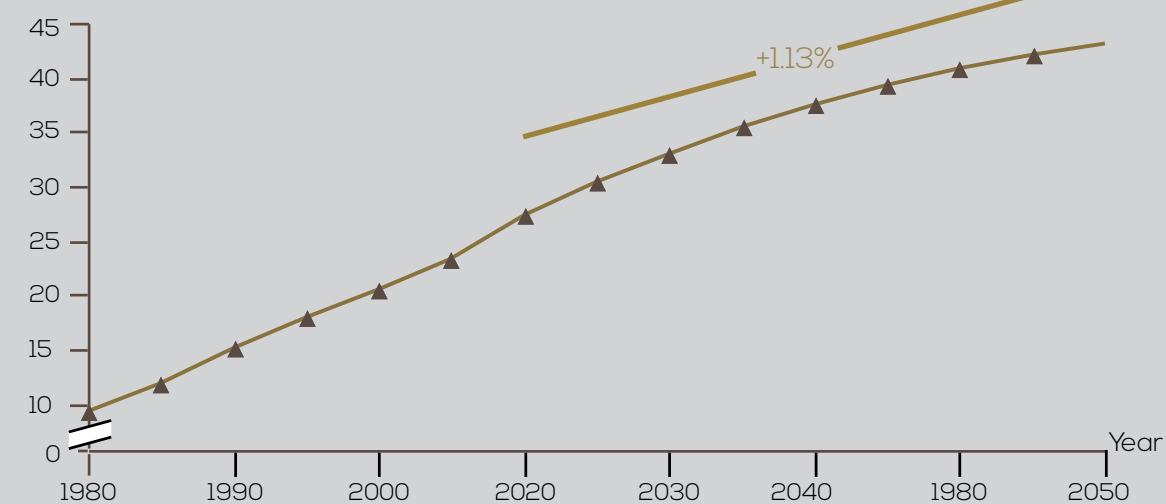
AGE BY GENDER



NATIONALITIES IN KSA



POPULATION (MILLIONS)



OUR CORE TARGET

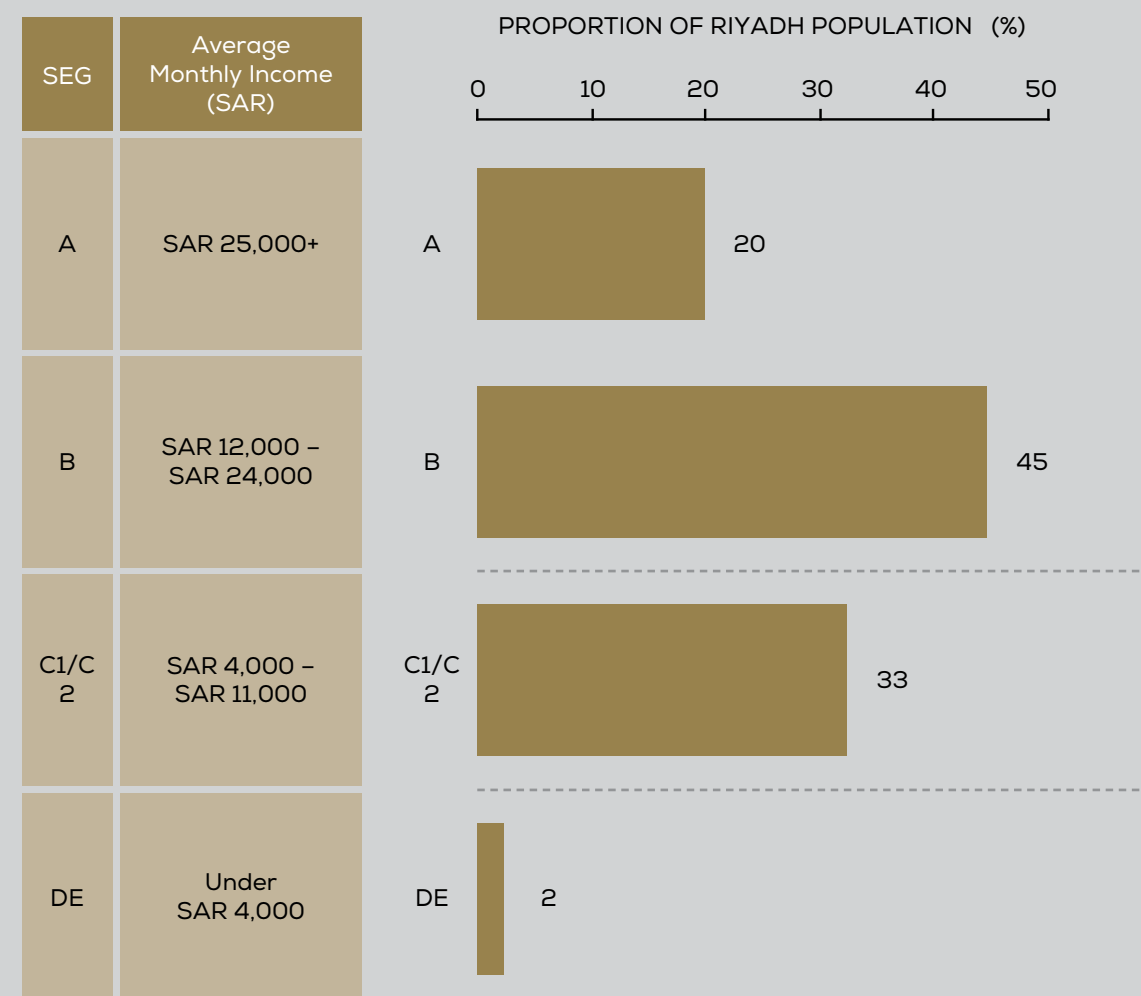
OVERVIEW

Some key facts about our core target market:

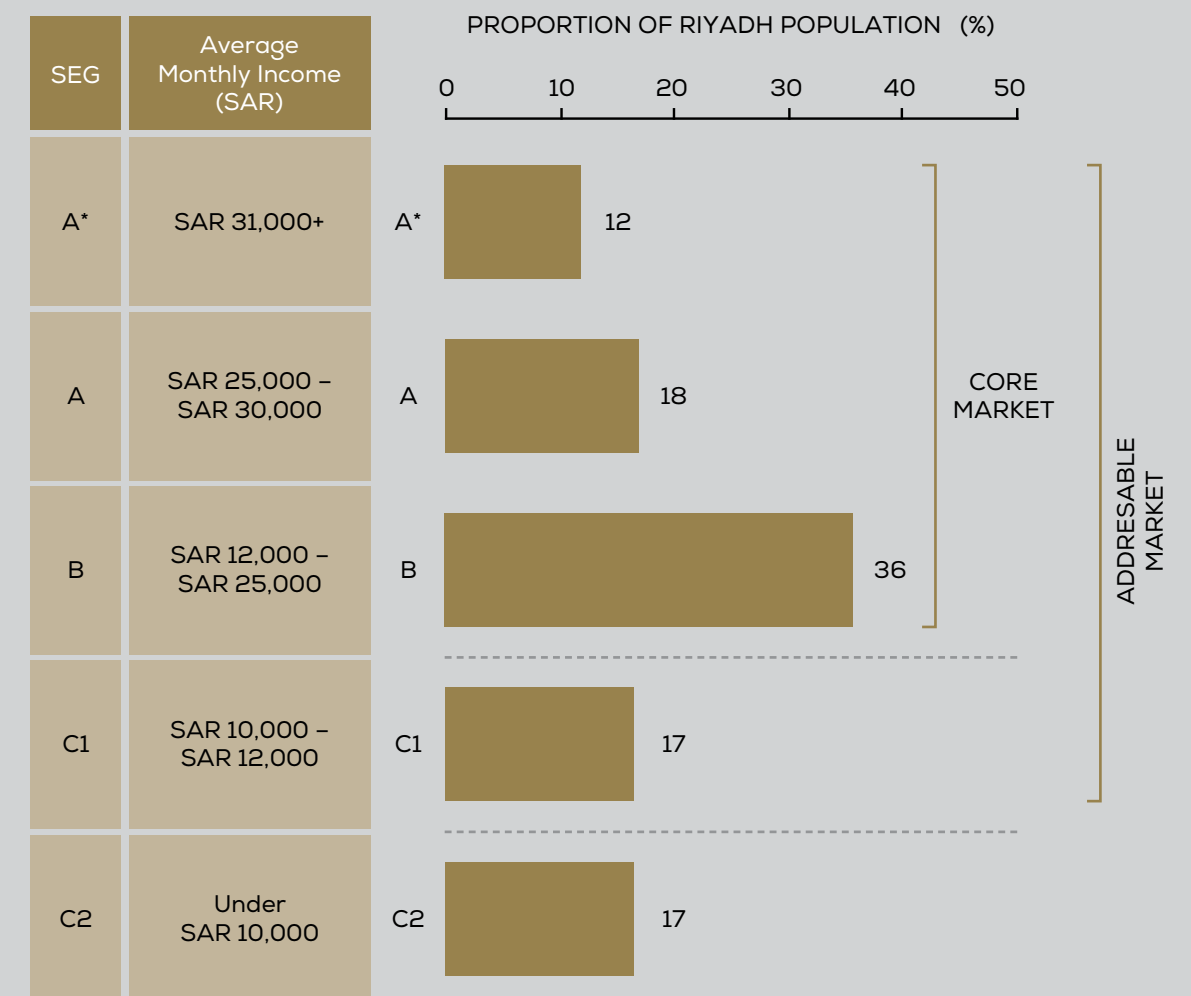
Residents from the A and B socio economic grade form 65 per cent of the Riyadh population.

A further 17 per cent are classified as C1S. At an income of around SAR 10,000 per month, they form part of the wider addressable market.

MARKET DATA



PRIMARY RESEARCH DATA





THE HISTORY

IT'S HAPPENING WHERE IT ALL BEGAN.

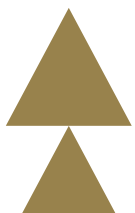


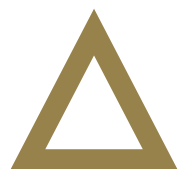
This iconic lifestyle destination is located within the historical region of Addiriyah and Wadi Hanifah wetlands in the Western area of Riyadh.

Addiriyah was recognised as a UNESCO World Heritage Site in 2010.

Plans are on to make Addiriyah a popular tourist destination by turning the 58-acre site into a living history museum, with a visitor reception centre, shaded walkways, exhibition galleries, a grand mosque and souks.

This will favourably drive additional footfall to Addiriyah Festival City Mall.







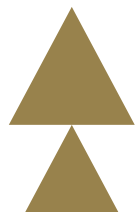
THE MALL

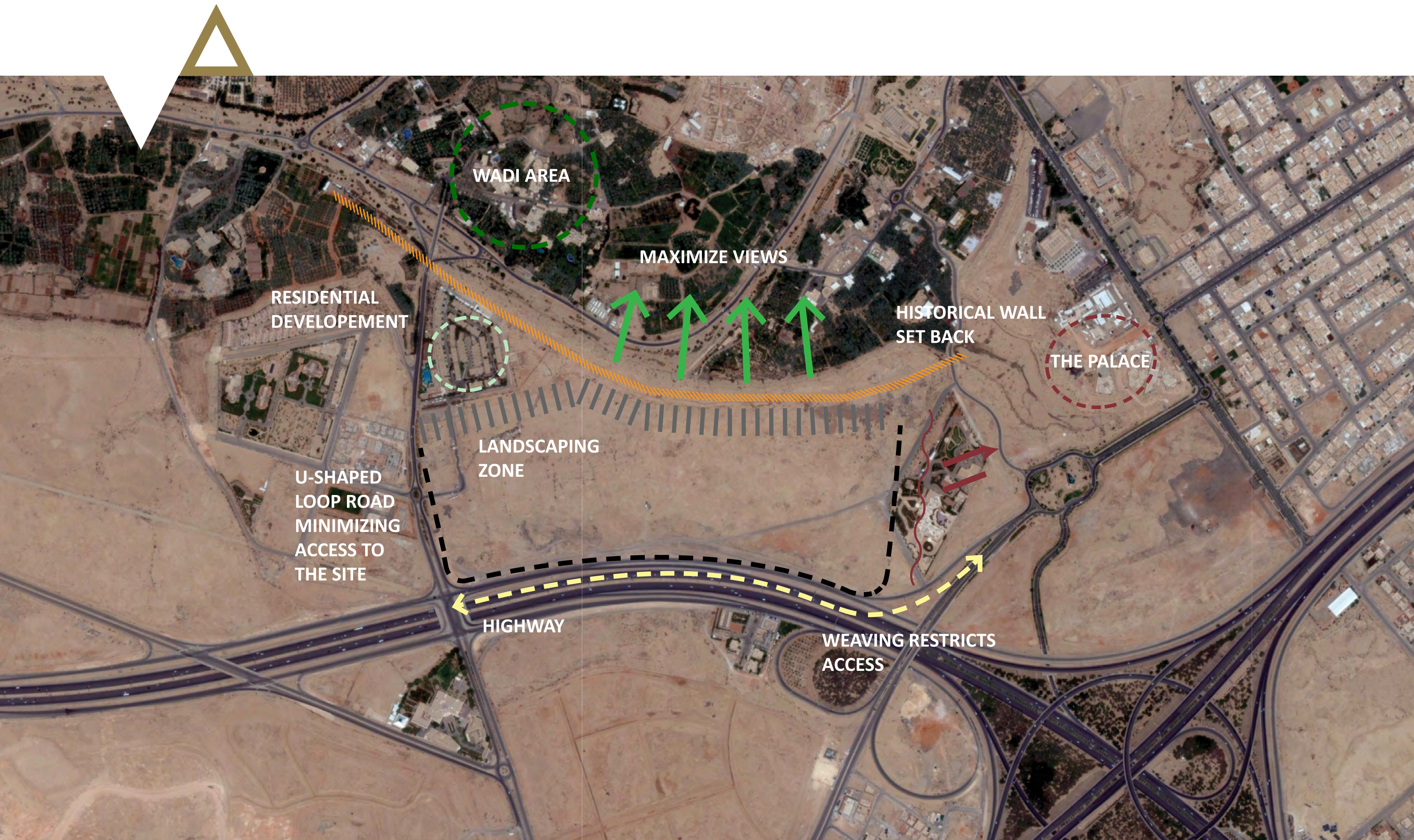
A WORLD OF LIFESTYLES. IN ONE PLACE.



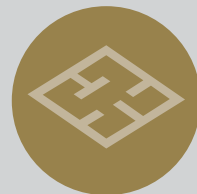
Addiriyah Festival City Mall is a vibrant, shopping, entertainment and leisure destination that provides a rich mix of lifestyle options.

The inviting gathering spaces for the visitors in the Mall is inspired by the open, natural origins of the Wadi area.





RETAIL LANDSCAPE



LAYOUT AND ARCHITECTURE

- 4-level race-track mall
- Retail mall integrated with IKEA and hotels
- Unique outdoor landscape experience



TARGET OPENING

- **IKEA** Q3 2017
- **Mall** Q4 2019
- **Hotels** Q4 2019



GROSS LEASABLE AREA OF RETAIL (GLA)

295,000 square meters



TARGET NUMBER OF STORES

850 retail outlets



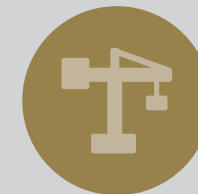
EXPECTED ANNUAL FOOTFALL (2020)

35 million visitors in the first year



PARKING

9,500 parking spaces



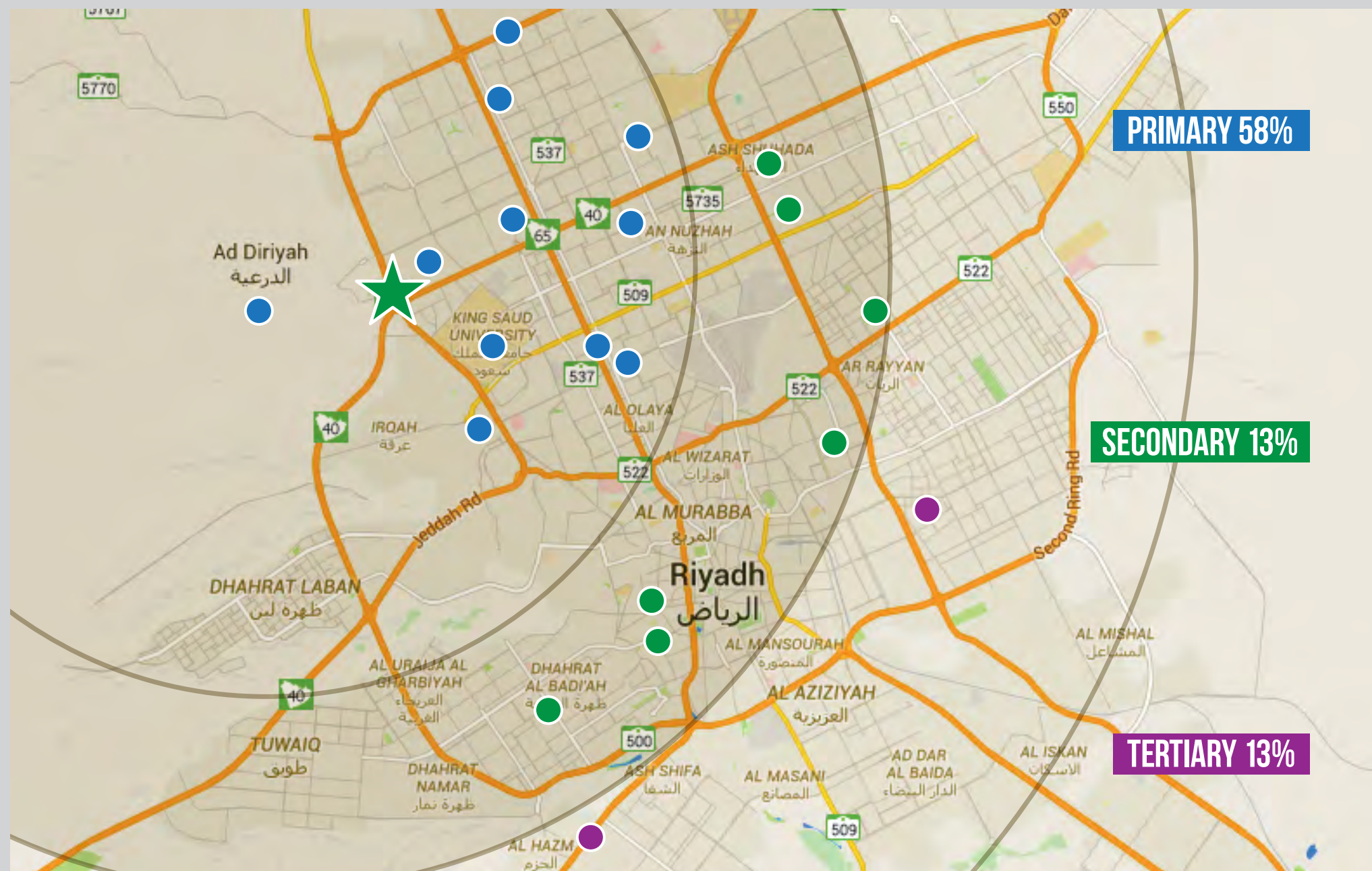
PLANNED COMPONENTS:

- Most complete luxury offer in Saudi Arabia
- 4 Department stores
- IKEA
- Hypermarket
- 150 food and beverage outlets
- Indoor snow hill
- The largest ice skating rink in Saudi Arabia
- Children's Edutainment Centre
- Family Entertainment Centre
- Over 100 flagship stores
- Future proofed for inclusion of cinemas
- Future proofed for additional car parks
- Planned public transportation link
- 4 star serviced apartments and a 5 star hotel

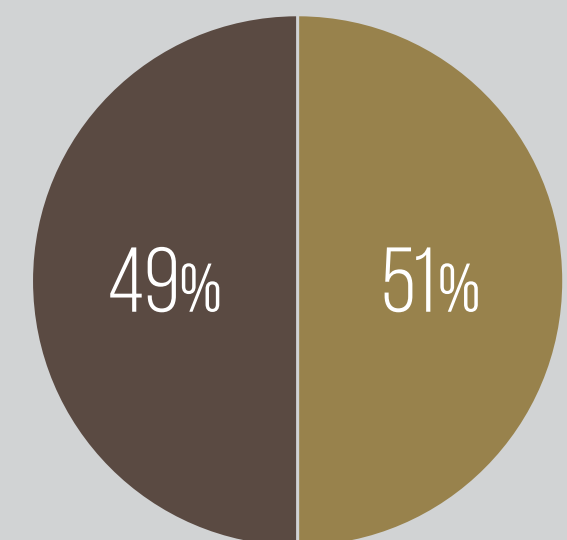
CATCHMENT AREA



AREA WHERE RESPONDENTS LIVE



GENDER OF RESPONDENTS,
N = 300



MALE
FEMALE

66% of respondents have lived in Riyadh for over 5 years,
whilst 34% have lived in Riyadh between 3 to 5 years

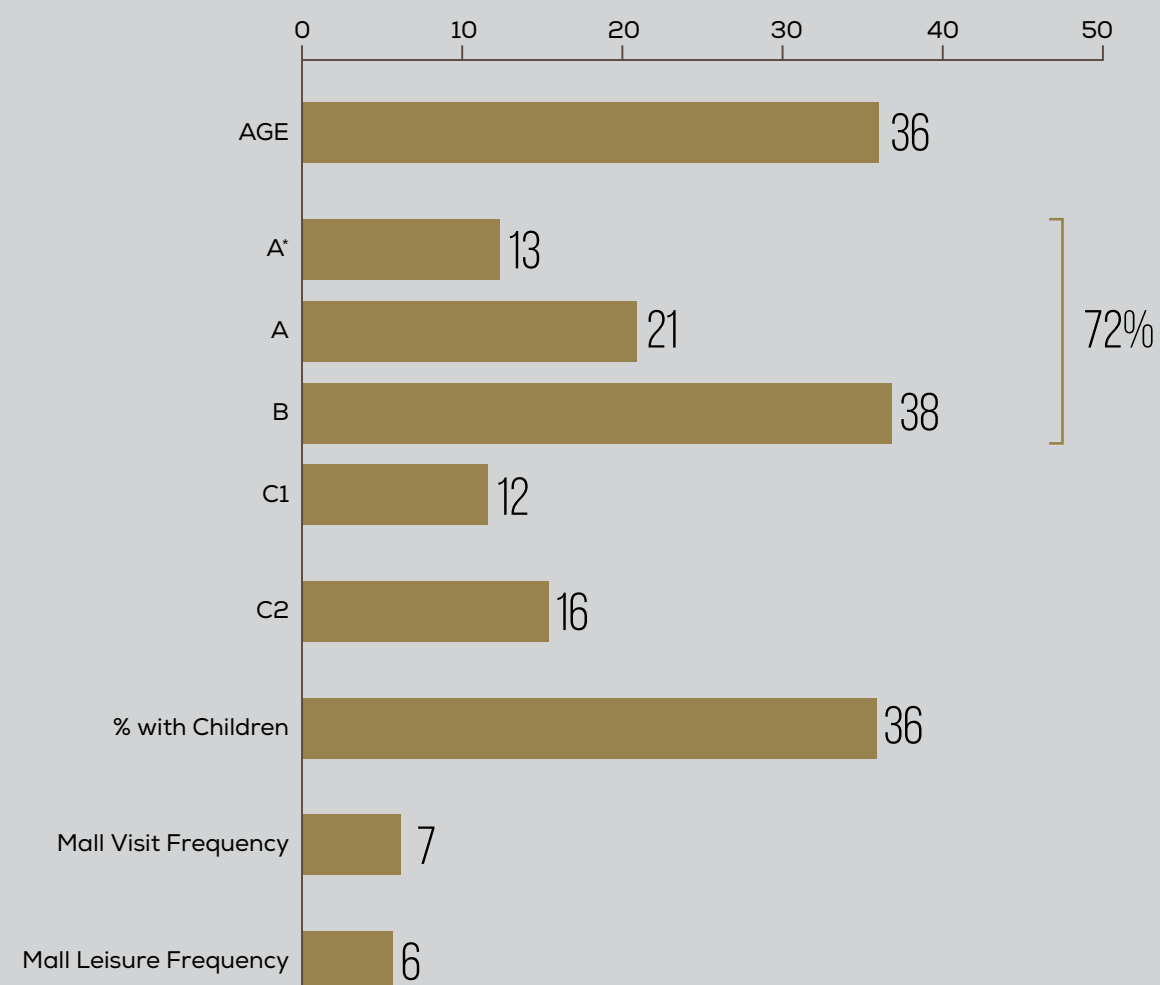
DEMOGRAPHICS

QUANT SURVEY

The primary catchment target audience is on average, younger and wealthier with fewer children and a higher frequency of retail and leisure mall visits, compared to secondary and tertiary catchment areas.

PRIMARY CATCHMENT

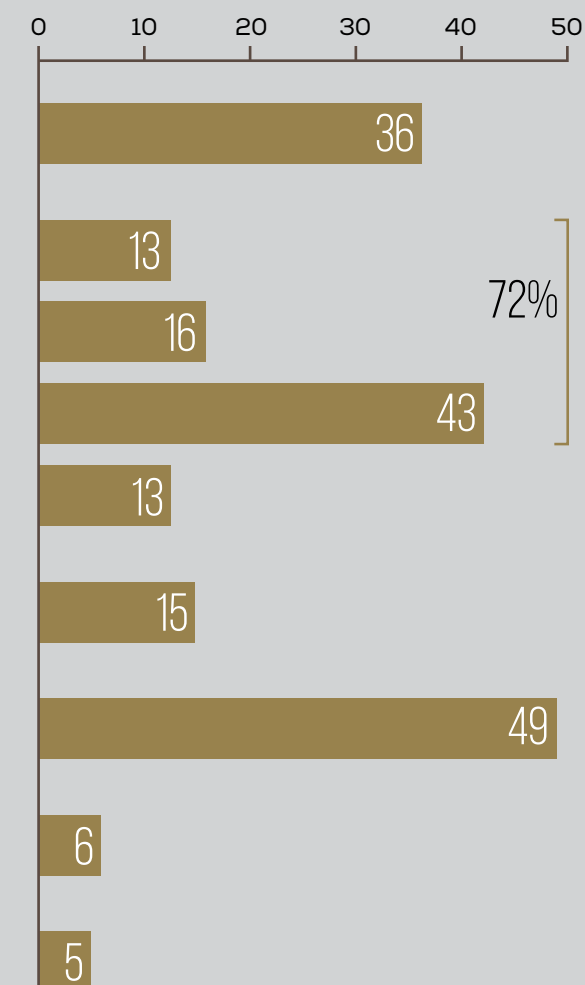
N = 175



MEAN INCOME: SAR 20,326

SECONDARY CATCHMENT

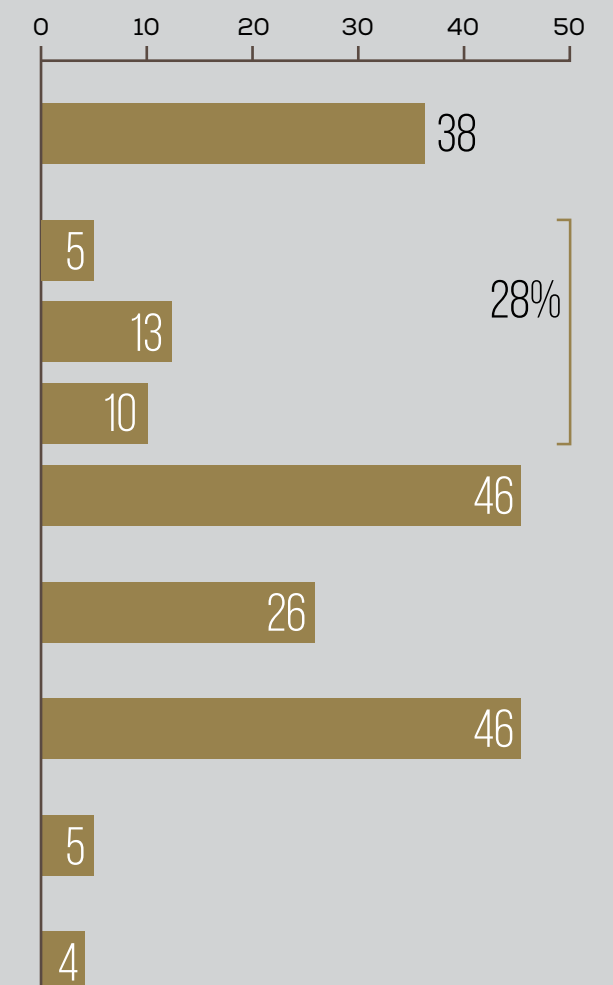
N = 86




MEAN INCOME: SAR 19,826

TERTIARY CATCHMENT


N = 39*



MEAN INCOME: SAR 13,590



INFRASTRUCTURE



Spread across 295,000 square metres of gross leasable area (GLA), Addiriyah Festival City Mall provides a unique landscape experience with a four level racetrack.

Its unique versatile offering, is underlined by the fact that it is a retail mall integrated with stand alone brands such as IKEA, as well as four star service apartments and five star international hotel.

Ease of access and egress have been strategically planned to ensure separate traffic flows for inbound and outbound visitors.

9,500 parking spaces make shopping easier, faster and more convenient.







SHOPPING

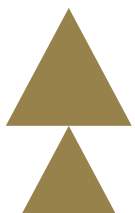
AN UNMATCHED CHOICE.



There is a balanced selection of international and local brands, spread across 850 retail outlets and over 100 flagship stores.

A versatile spread that appeals to everyone from the mid-level shopper to the high-end luxury seeker. Making Addiriyah Festival City Mall an unrivalled destination for choice and convenience.

An integrated IKEA store across a GLA of 36,000 square metres serves as a strong anchor point for shoppers in Riyadh.







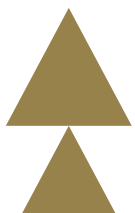
ENTERTAINMENT

FUN HAS NO BOUNDARIES.



Visitors can explore the country's first state-of-the-art ice rink and snow play area, including an Indoor Snow Hill, a first of its kind experience in the Kingdom of Saudi Arabia.

There are endless family entertainment options, from a Children's Educational Centre to a Family Entertainment Centre. All the right excuses for a refreshing break after shopping!







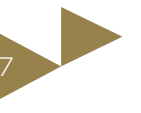
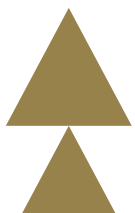
DINING

A WORLD OF APPETISING DELIGHTS.



An outstanding choice of dining outlets offer a variety of choices for gourmets and families alike.

There is a delicious spread of 150 food and beverage outlets featuring regional and international cuisines, from distinctly styled speciality restaurants and cafes, to the familiar international fast food brands at the food court.





HOSPITALITY

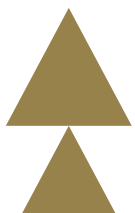
WHERE BUSINESS AND PLEASURE MEET.



The Kingdom of Saudi Arabia plans to invest over SAR 30 billion in tourism over the next ten years, foreign tourist arrivals to Saudi Arabia are set to continue to grow from their 2012 level of 14.3 million to 21 million by 2023.

International tourists make up over two thirds of tourists to Riyadh at around 4.2 million. A large proportion of these visitors staying in the hotels, will create an opportunity for Addiriyah Festival City Mall to capture footfall from the increasing number international visitors.

The uniquely planned integration of retail and hospitality, means that visitors can enjoy the best of two worlds. Enjoy the pleasure of shopping whilst conducting business at the conference centres of the five star luxury hotel.





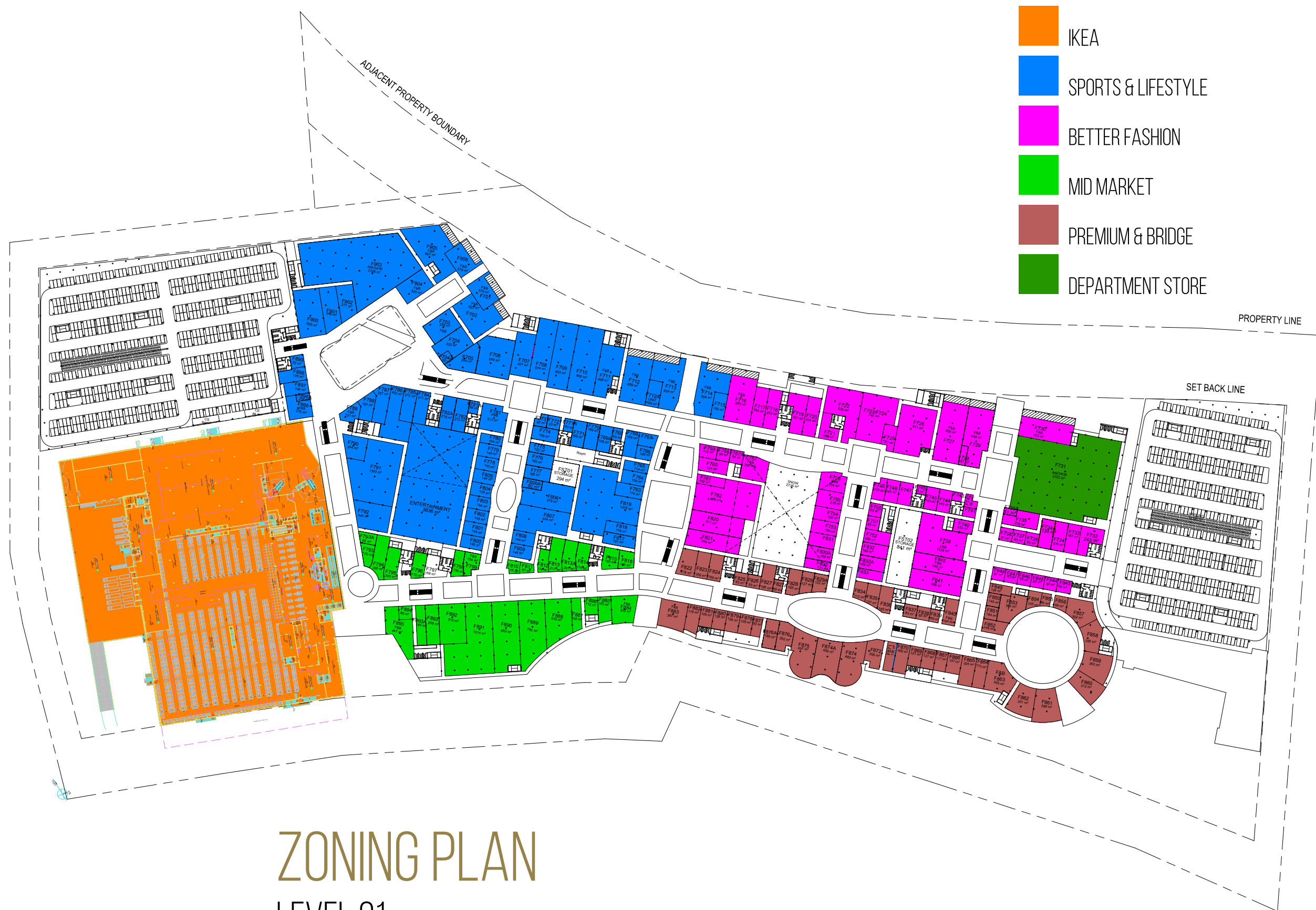
FLOOR PLANS

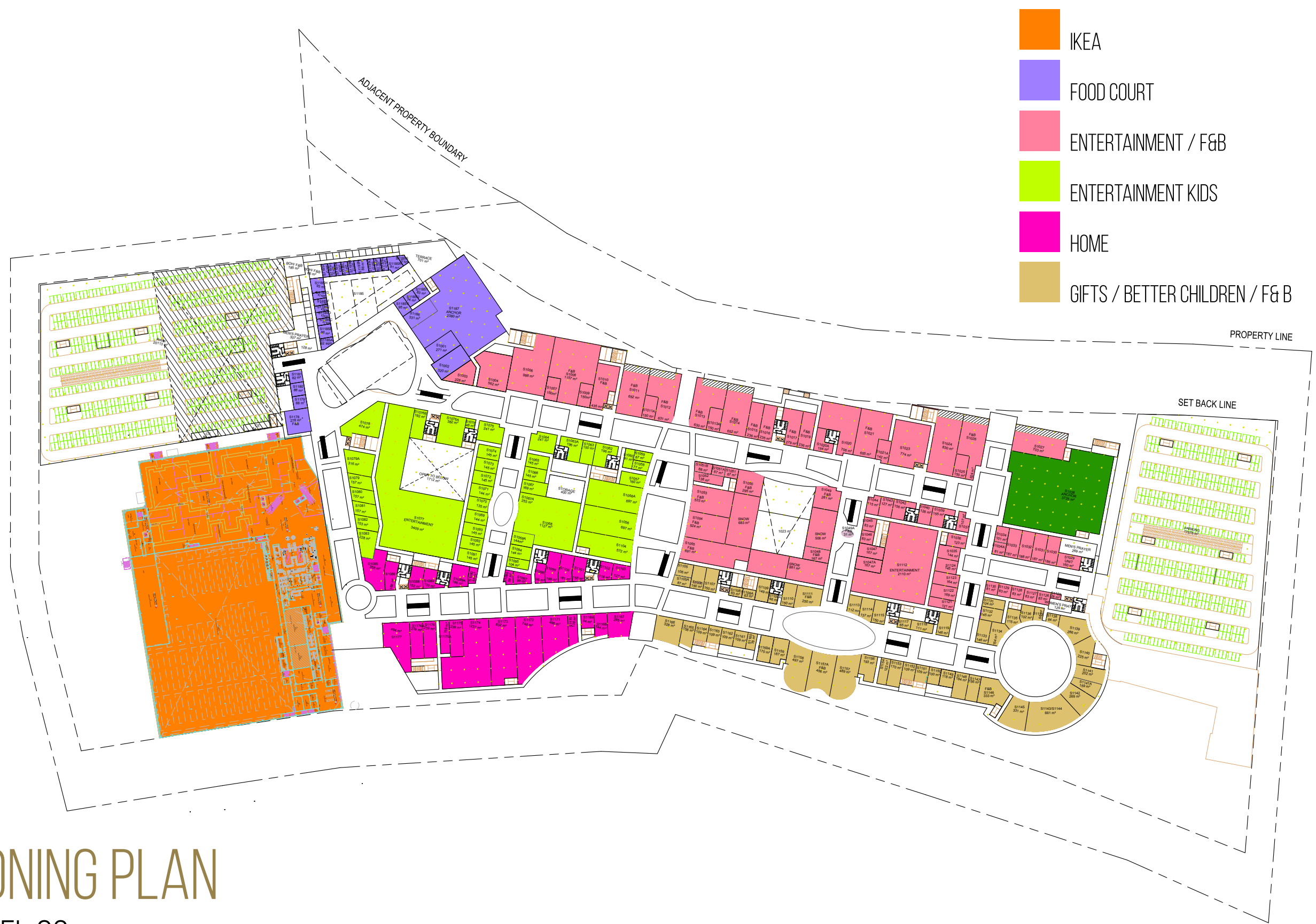




ZONING PLAN

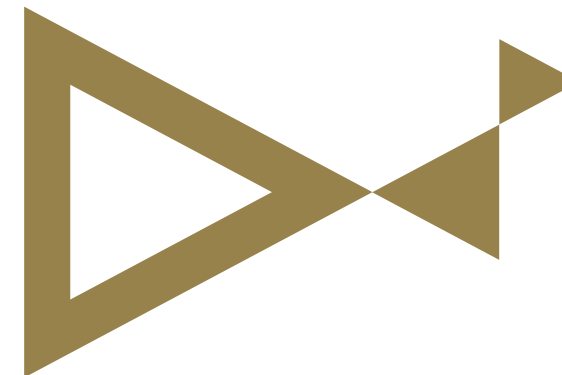
LEVEL GF





ZONING PLAN

LEVEL 02



KAYANNAT REAL ESTATE COMPANY

Addiriyah Festival City Mall is one of the first projects undertaken by Kayannat Real Estate Company, a limited liability company established in 2012. Al-Futtaim is a majority shareholder in Kayannat Real Estate that is headquartered in Riyadh, Saudi Arabia, it has an investment capital of over SAR 1 billion. The company specialises in developing shopping centres and in their ownership, operation and management.

FOR LEASING ENQUIRIES PLEASE CONTACT:



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