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GET READY FOR 25
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CANNES • FRANCE
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GET READY FOR MAPIC 25

This document is a must read companion for MAPIC 2025, distilling the most up to date retail intelligence from Cushman & Wakefield into clear takeaways that turn market noise into action.



ROB TRAVERS
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Head of EMEA
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Whether landlord, retailer, investor, or advisor, this guide equips you with the insights needed to make faster, smarter and business aligned real estate decisions in Cannes and beyond.



EUROPEAN RETAIL RADAR

ACCESS KEY RETAILER ACTIVITY DYNAMICS

Insights ranging from essential economic indicators to emerging retailer trends, this data-rich resource delivers analysis of over 9,000 letting transactions, covering key retailer activity dynamics.

With vital insights particularly for retail real estate investors, landlords and developers, the Cushman & Wakefield European Retail Radar equips you with the knowledge to make informed decisions and help you shape the future of Europe's dynamic retail ecosystem.



ACCESS NOW



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CELEBRATING

30 YEARS OF MAPIC

For 30 years, MAPIC has been the premier gathering for Retail & Leisure experts worldwide, a place where industry leaders connect, share insights, and forge deals that have propelled some of the world's most innovative and influential brands into new markets, iconic streets, and remarkable success stories.

At Cushman & Wakefield, we're proud to have been a trusted partner of MAPIC throughout this journey, growing alongside the event as our brand, people, and services have evolved to meet the ever-changing retail landscape. We firmly believe that the best ideas in retail only come to life when you have the people to make them happen, and we're fortunate to have core team members who have been part of the MAPIC experience for over 24 years. Be sure to keep an eye out for them at this year's event and don't hesitate to say hello!

YEARS ATTENDING MAPIC



CHRISTIAN DUBOIS
30 YEARS



YVONNE COURT
29 YEARS



CRISTINA PEREZ DE ZABALZA
28 YEARS



THOMAS CASOLO
27 YEARS



JEAN BAHEUX
27 YEARS



VIKTORIA SZABO
26 YEARS



JAN KOTRBACEK
24 YEARS



ANNA VALCEA
24 YEARS





















CW MAPIC THROUGHOUT THE YEARS





















LUXURY RETAIL

EUROPE SUSTAINS GLOBAL LEADERSHIP IN LUXURY WITH DISTINCT

Experience-rich shopping anchored in fashion capitals and historic high streets that continue to draw discerning spend.

PHYSICAL STORES REMAIN CENTRAL TO BRAND ELEVATION AND GROWTH

With leading luxury houses extending footprints and deepening presence in prime urban nodes.

EXPERIENTIAL RETAIL IS ACCELERATING

As brands invest in services, culture, and hospitality elements to enhance engagement and differentiation in competitive markets.

THE RISE OF QUIET LUXURY AND MINDFUL TRAVEL

The more ostentatious “status” travel is cooling off. People are favouring understated elegance, authenticity, local craftsmanship, and experiences with meaning rather than spectacle.



Today’s high-end consumers don’t just shop, they seek connection, storytelling, and design that mirrors their values.



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LATEST INSIGHTS



C&W EUROPEAN LUXURY RETAIL REPORT

ACCESS REPORT HERE

F&B / LEISURE

EUROPE'S F&B MARKET IS SPLITTING BETWEEN VALUE-LED FAST CASUAL AND PREMIUM EXPERIENTIAL DINING

With mid-market brands losing ground. Real estate demand is strongest for operators offering distinct concepts and scalable formats, especially in urban and travel hubs.

THE COMPETITIVE SOCIALISING BOOM CONTINUES

But the sector is entering a maturity phase. Only brands with strong concepts and lasting appeal will thrive. Landlords now seek operators offering flexibility, repeatability, and all-day relevance.

BOUTIQUE FITNESS, REFORMER PILATES, AND WELLNESS STUDIOS REMAIN TOP PERFORMERS, DRIVING GROWTH IN ATHLEISURE RETAIL

Real estate strategies increasingly centre on experience-led, lifestyle-focused tenants that enhance dwell time and community engagement.

THE UK REMAINS A KEY ENTRY MARKET FOR NEW F&B AND LEISURE CONCEPTS

Its innovative consumer base and dynamic retail landscape make it a testing ground for brands before expanding into mainland Europe, signalling future regional trends.



I'm seeing real momentum across Europe's F&B and leisure sectors, with both value-led and premium concepts thriving. Growth in wellness, social leisure, and experience-driven dining is creating exciting new opportunities for innovative, flexible real estate.



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LATEST INSIGHTS



FOOD HALLS OF EUROPE REPORT

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CAPITAL MARKETS

RECOVERY GAINING TRACTION

Retail and leisure real estate investment in Europe is rebounding, with retail premises investment up 31% year-on-year, totaling €36 billion in the past year. Easing inflation and expectations of lower interest rates are improving financing and leasing conditions.

SECTORAL WINNERS AND DIVERGENCE

Destination shopping centers, grocery-anchored retail parks, and high-quality leisure assets in prime locations are thriving, while less-prime high streets and aging malls struggle due to online competition and shifting consumer habits.

REGIONAL VARIATION & INVESTOR FOCUS

The UK, Germany, and France lead in investment volumes, but growth is strongest in southern and Central Europe (Spain, Italy, Poland). Investors are targeting well-located, future-proof assets over broad-based opportunities.

OUTLOOK & CAUTION FLAGS

The outlook is cautiously positive, with prime rental growth projected at 2-3%. However, risks include high borrowing costs, fragile consumer spending, and structural challenges like e-commerce and ESG regulations impacting weaker assets.



The retail real estate market is evolving, offering challenges and strategic opportunities amid shifting consumer trends and growing e-commerce.

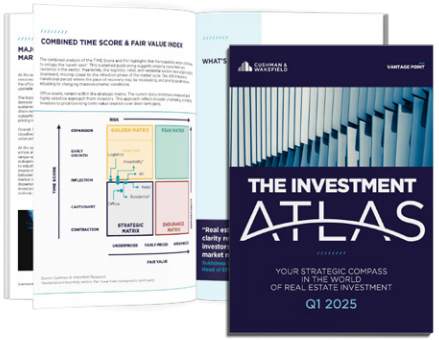


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LATEST INSIGHTS



THE INVESTMENT ATLAS Q1 2025 REPORT

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CROSS BORDER RETAIL

FOCUS ON FLAGSHIP AND EXPERIENCE LED STORES

Brands are prioritising fewer, larger, high-impact flagships that serve as brand showcases rather than pure sales drivers.

OMNI-CHANNEL AND LOGISTICS INTEGRATION

Retailers are aligning store networks with e-commerce and fulfilment, using physical spaces as experience, collection, and distribution hubs.

GLOBAL EXPANSION IS NOW MEASURED AND STRATEGIC

Brands enter fewer, higher-potential markets often via local partnerships or franchises to reduce risk.

DEMAND IS GROWING FOR ENERGY-EFFICIENT

Flexible retail spaces as retailers pursue ESG goals and seek leases that adapt to evolving formats and footfall patterns.

Global retailers are taking a more strategic and confident approach to expansion, focusing on flagship experiences, stronger local partnerships, and real estate that's flexible, sustainable, and aligned with their omni-channel goals.



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LATEST INSIGHTS



RETAIL IN MOTION H1 2025 REPORT

ACCESS REPORT HERE



GLOBAL CITIES RETAIL GUIDES REPORT

ACCESS REPORT HERE

SUPPLY CHAIN & LOGISTICS

AS CUSTOMERS SHOP BOTH IN-STORE AND ONLINE

Ensuring the right products are available at the right locations is critical for a smooth consumer experience.

TODAY'S CUSTOMERS INCREASINGLY EXPECT OPTIONS IN HOW, WHEN, AND WHERE...

they receive products they buy online. Flexibility in last-mile delivery allows retailers to cater to these expectations while managing costs effectively.

FOR TODAY'S SHOPPERS, A COHESIVE EXPERIENCE BETWEEN DIGITAL AND PHYSICAL CHANNELS IS CRUCIAL

The ability to browse online and seamlessly pick up in-store, or return items across channels, enhances brand loyalty and customer satisfaction.

RESILIENCE IS CRUCIAL FOR RETAILERS NAVIGATING SEASONAL DEMAND

Fluctuating customer patterns, and unexpected disruptions. By incorporating predictive analytics and digital twins, retailers can anticipate inventory needs, manage peaks, and adapt to changing conditions.



Retailers are reshaping their supply chain real estate to stay agile, prioritising last-mile hubs, flexible logistics, and sustainable solutions to meet evolving consumer demands.



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LATEST INSIGHTS



EUROPEAN RETAIL LOGISTICS REPORT

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MAIN STREETS ACROSS THE WORLD 2024

In its 34th year, this benchmark ranking confirms the enduring value and resilience of prime pitches, with global headline rents surpassing pre-pandemic levels and Europe hitting historic milestones. The 2025 edition launches shortly after MAPIC, see teaser to the right.

- Via Montenapoleone (Milan) ranked world's most expensive for the first time in the report's history, ahead of New York's Upper 5th Avenue.
- Rent growth recorded in 79 of 138 tracked locations with a 4.4% global average, as retailers prioritize flagship positioning and omnichannel-led footfall capture.
- London's New Bond Street moved up the global ranking, while Paris' Champs-Élysées maintained top-tier status amid resilient demand.
- Prague's Pařížská ranks among the top 20, with top achievable rents around €2,700/sq m/yr as of Q3.
- Outlook brightened by expected rate cuts and tourism tailwinds, though tenant strategies remain highly selective.



ACCESS REPORT HERE



PREVIEW: MAIN STREETS ACROSS THE WORLD 2025

THE 35TH EDITION | MAIN STREETS ACROSS THE WORLD 2025

Celebrating 35 years of retail legacy, this heritage edition features expert insights on the evolution of the high street and what's next for the world's most iconic shopping destinations. Sign up to receive the report straight to your inbox, and request a post-MAPIC briefing to find out who's gaining ground and why it matters for 2026.



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PRE-REGISTER HERE

GLOBAL PLATFORM

GLOBAL RETAIL STRATEGY WITH LOCAL PRECISION

From global brands to local developers, we help clients create retail strategies that perform in today's dynamic market. With deep expertise across leasing, investment and operations, we partner with clients to deliver solutions that drive revenue, strengthen portfolios and bring retail visions to life, with impact that lasts.

CORE STATS

$11.8 Billion
Brokerage
Transaction Value

650 Million
Sq Ft Under
Management

41,000
Properties Appraised

*Statistics represent a three-year average across the globe; transactions in USD

HOW WE NEVER SETTLE...

RETAIL STRATEGIES THAT WORK ON THE GROUND

Opening a new store is more complex than ever. Our advisors use data-driven insights, community alignment and sector expertise to help occupiers make confident decisions that enhance brand presence, improve margins and resonate with local consumers.

INVESTOR EXPERTISE BUILT FOR CHANGE

We advise investors, landlords and developers on how to acquire, lease, reposition and operate high-performing retail assets. With insight into tenant demand, consumer trends and capital markets, we help retail real estate adapt and thrive.

INSIGHTS THAT REVEAL WHAT'S NEXT

Retail never stands still. That's why we continuously track shifts in consumer behaviour, tenant strategies and location dynamics. By combining real-time data with deep sector experience, we help clients stay ahead of change, and shape it.

TAILORED SOLUTIONS THAT DELIVER

With a global network of retail specialists and a problem-solving mentality, we deliver strategies that reflect the nuance of each client's goals, whether it's increasing footfall, optimizing revenue, enhancing tenant mix or maximizing asset value.

ADVISORS WHO THINK LIKE RETAILERS

Retail success requires commercial creativity. Our teams bring entrepreneurial spirit and years of experience advising the world's leading brands and retail landlords. We don't just understand the industry, we live it.

PLACES THAT PERFORM AND BELONG

We believe in retail that connects. By aligning location strategy with local needs, we help occupiers and owners create destinations that add value to communities, enhance social impact and build long-term resilience.

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THINK GLOBAL. ACT LOCAL.

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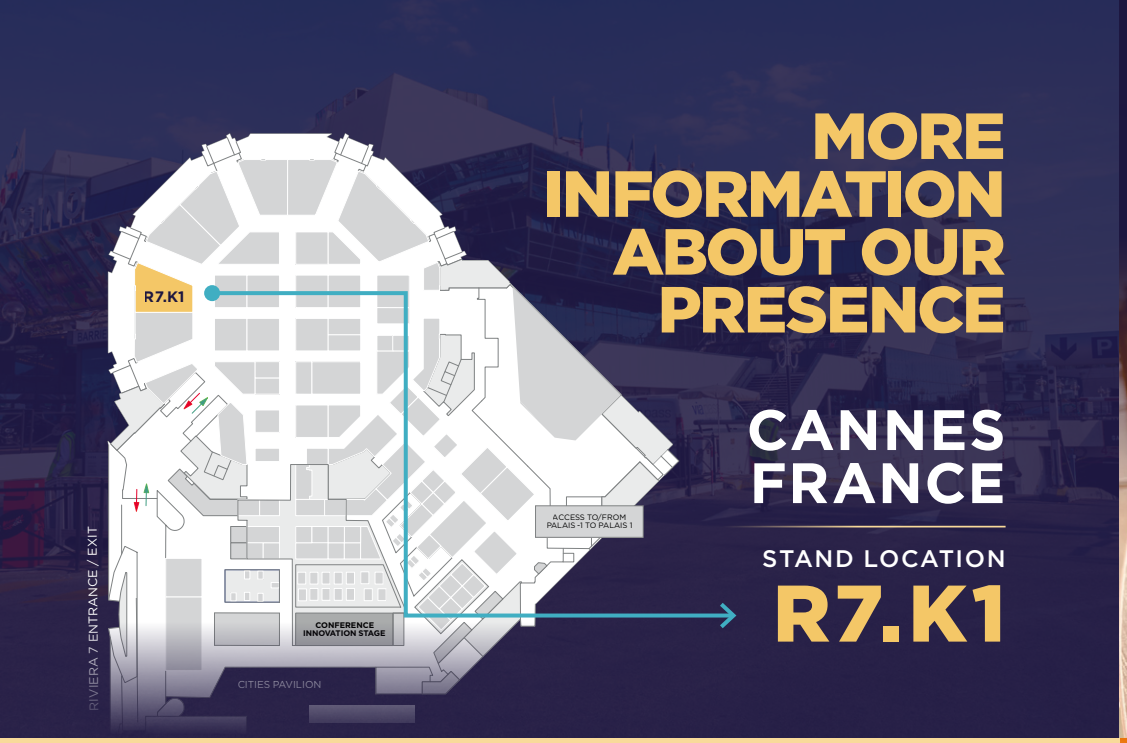
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MORE INFORMATION ABOUT OUR PRESENCE

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DELEGATE LIST

MEET THE EXPERTS SHAPING RETAIL REAL ESTATE

Connect with Cushman & Wakefield's top minds at MAPIC 2025.

Use the Delegate Book to plan your conversations and unlock tailored solutions for your retail ambitions.



VIEW ATTENDEES

C&W WELCOME BRUNCH

4 NOVEMBER 2025
TUESDAY • 10:00 – 11:00

C&W STAND R7.K1
PALAIS DES FESTIVALS



ADD TO CALENDAR

C&W OPEN HOUSE DRINKS

4 NOVEMBER 2025
TUESDAY • 16:30 – 19:00

C&W STAND R7.K1
PALAIS DES FESTIVALS

ADD TO CALENDAR

C&W X UPLACE BROEKLIN BRUNCH

5 NOVEMBER 2025
WEDNESDAY • 10:00 – 11:00

C&W STAND R7.K1
PALAIS DES FESTIVALS



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C&W X FREEHOLD OPEN HOUSE DRINKS

5 NOVEMBER 2025
WEDNESDAY • 16:30 – 19:00

C&W STAND R7.K1
PALAIS DES FESTIVALS

RSVP HERE

EXPERT INSIGHTS OVERVIEW OF THE MARKET

4 NOVEMBER 2025
TUESDAY • 10:00 – 10:30

TRENDS STAGE, RIVIERA 7
PALAIS DES FESTIVALS

HOW HAVE RETAILER AND RETAIL PROPERTY PLANS BEEN REFOCUSED BY THE MACROECONOMIC PICTURE?

- Understanding retailer priorities in a reshaped world
- Looking at which markets stand to win or lose
- The year ahead and the hot sectors set for growth



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FRENCH RETAIL & LEISURE SUMMIT

5 NOVEMBER 2025
WEDNESDAY • 10:30 - 12:00

VERRIÈRE GRAND AUDI
PALAIS 1

WHAT KEY TRENDS ARE SHAPING THE FUTURE OF THE FRENCH RETAIL AND REAL ESTATE MARKET?

- Hear insights from top industry leaders driving change in France's retail and property sectors.
- Explore emerging trends and investment opportunities shaping the market landscape.
- Network with major players and decision-makers at this exclusive industry summit.



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KEY CONTACTS FROM THE BDS TEAM

EMEA MARKETING & KEY CLIENTS

If you'd like to learn more about Cushman & Wakefield's market insights, thought leadership, and built environment expertise, or need assistance elevating your presence at MAPIC, we're here to help.



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EMEA EVENTS

For all questions, related to Cushman & Wakefield's MAPIC exhibition and programme of event activities or any other on-site delivery enquiries.



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ABOUT CUSHMAN & WAKEFIELD

Cushman & Wakefield (NYSE: CWK) is a leading global commercial real estate services firm for property owners and occupiers with approximately 52,000 employees in nearly 400 offices and 60 countries. In 2024, the firm reported revenue of $9.4 billion across its core service lines of Services, Leasing, Capital markets, and Valuation and other. Built around the belief that *Better never settles*, the firm receives numerous industry and business accolades for its award-winning culture.

For additional information, visit **www.cushmanwakefield.com.**

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