

RETAIL IN *Motion*

ISSUE 01 | H1 2025

Better never settles





INTRODUCTION

At Cushman & Wakefield, we are uniquely positioned to observe the shifts, opportunities, and standout performers across EMEA's retail and F&B landscape. Every six months, Retail in Motion will deliver fast, focused insights on the brands setting the pace, the trends shaping consumer demand, and the deals redefining prime real estate.

The market's energy is back, with strong momentum during the first half of 2025. Beauty disruptors, new-wave athleisure players, Korean skincare brands, and healthy fast-casual food concepts are leading the charge. What's driving it all? A renewed appetite for newness, speed and discovery. Whether online or in-store, today's consumers are seeking what's hot, what's next, and what feels effortlessly convenient and connected.



73% of consumers say brand experience influences their loyalty as much as the product itself.

Source: PwC





WHAT'S HAPPENING ACROSS EMEA RETAIL

1. COLLECTIBLES



Affordable collectibles and IP-driven merchandise are thriving, showcasing the demand for limited-edition drops and character licensing.

Examples:
Pop Mart, Miniso, Fanatics flagship stores

2. FOOTWEAR



Performance, premium, and design-led sneakers are major drivers of retail expansion.

Examples:
On Running, New Balance, Axel Arigato, Salomon, Onitsuka Tiger

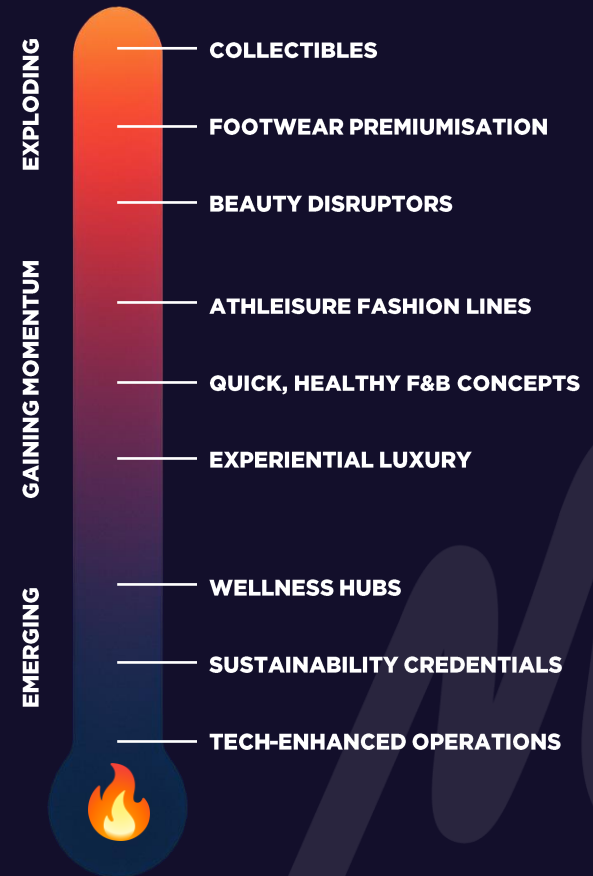
3. BEAUTY



Standalone beauty concepts are securing prime real estate, while breakout brands are driving rapid growth with high-impact pop-ups.

Examples:
Sephora EMEA growth, Amazon beauty debut in Milan, Rhode Beauty \$1bn sale to e.l.f.

CUSHMAN & WAKEFIELD TREND-O-METER H1 2025



AS SEEN IN WARSAW MINISO ZŁOTE TARASY



AS SEEN IN LONDON ON BATTERSEA POWER STATION



AS SEEN IN LIVERPOOL SEPHORA LIVERPOOL ONE





EMERGING BRANDS & BREAKOUT PLAYERS

2025's retail energy is all about buzz, movement and momentum.

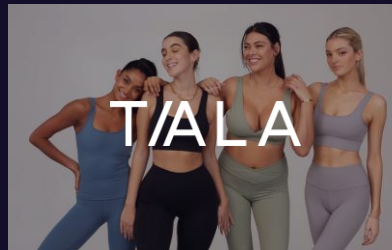
Korean beauty continues its global takeover, with disruptors such as Pure Seoul leading the charge in the UK.

Athleisure is booming: Tala's first physical store on Carnaby Street is drawing crowds, while On, Alo, Vuori, Varley and Gymshark scale up their footprint.

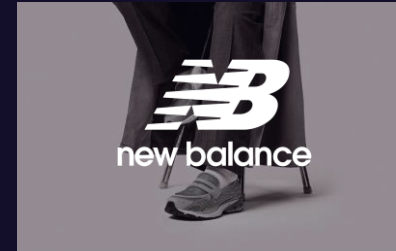
Trainers remain a retail power move, with brands such as New Balance expanding fast.

Collaborations are still a major hype driver. Zara x Kate Moss for festival season, Havaianas x D&G, and even Alo linking up with Roblox to tap into the digitally-native crowd.

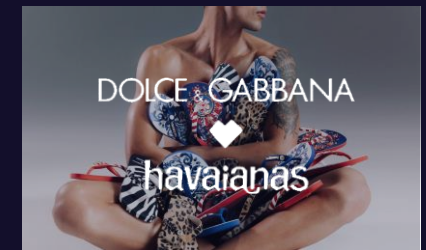
WHO'S HOT



WHO'S EXPANDING



BRAND COLLABS



Today's hottest brands are those who move fast, stay culturally tuned, and deliver experiences beyond the product.



SPACES WE LOVE: FLAGSHIPS

#CWFLAGSHIPS

THE BEST OF FLAGSHIP STORES ACROSS EMEA

Across EMEA, brands are going big, bold and hyper-local with their flagship strategies.

In London's Covent Garden, Onitsuka Tiger opened a striking new space, even transforming the pub opposite into the "Onitsuka Tiger Tavern" for launch day.

Over in Madrid, Lefties (Inditex's most affordable brand) has taken a bold step in Parquesur, Madrid with the launch of Lefties Home, marking a strategic move into lifestyle and interiors.

Ikea landed on Oxford Circus with its much-anticipated city flagship. New Balance's sleek, high-design store balances heritage and hype in Antwerp.

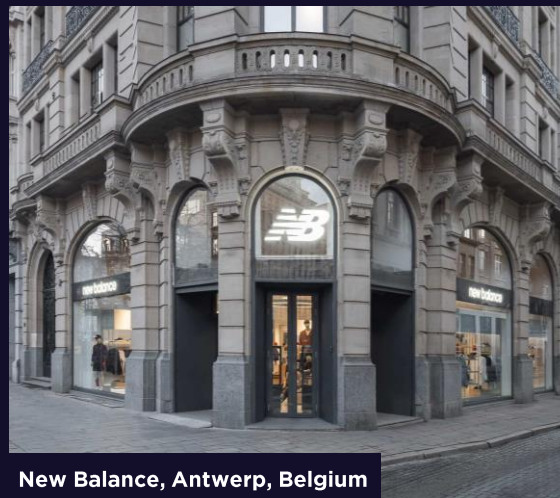
In Liverpool, Sephora didn't just open a store - it staged a city takeover, marking one of the most impactful beauty debuts this year.



Onitsuka Tiger, Covent Garden, London, UK



Lefties, Westfield Parquesur, Madrid, Spain



New Balance, Antwerp, Belgium



IKEA, Oxford Circus, London, UK



SPACES WE LOVE: F&B AND LEISURE

#CWFOODLEISURE

THE BEST OF F&B AND LEISURE ACROSS EMEA

Chicken continues to dominate the casual dining scene, drawing massive crowds and major buzz - just ask the superfans who queued for 50 hours to be first through the doors of Popeyes' new Brno location in Prague.

At the other end of the spectrum, health-forward concepts are booming. Premium salad and "grab & go" brands like The Salad Project, Atis and Farmer J are tapping into demand for fast food with a healthy twist. More players are lining up to enter this space, making it one to watch.

Coffee remains a strong category, with premium operators like Terres de Café, Noir and %Arabica continuing to expand. These recent Paris openings underscore sustained demand for high-quality, design-led café experiences.



The Salad Project, Mansion House, London, UK



Popeyes, Brno, Czech Republic



Swingers Crazy Golf, Dubai, UAE



% Arabica in Marais, Paris, France



SPACES WE LOVE: LUXURY RETAIL

#CWLUXURY

THE BEST OF LUXURY RETAIL ACROSS EMEA

Far beyond product showcases, physical stores remain pivotal to luxury brands' identity. Dior unveiled a new flagship on Geneva's Rue du Rhône, featuring tiered collections and a top-floor VIP salon with lake views.

IWC Schaffhausen debuted L'Appartement IWC on the Champs-Élysées, a refined Parisian-style duplex blending historical elements with bespoke experiences and dedicated event spaces.

Goyard relocated in Milan to Palazzo Melzi di Cusano. The 230 sqm space reflects the brand's elegant tradition.

Van Cleef & Arpels marked its entry into the Dutch market with a striking, three-floor Amsterdam boutique. The 600 sqm space features a fragrance bar and an upstairs VIP salon.



Dior, Rue du Rhône, Geneva, Switzerland



IWC Schaffhausen L'Appartement, Paris, France



Goyard, Palazzo Melzi di Cusano, Milan, Italy



Van Cleef & Arpels, Amsterdam, Netherlands



SPACES WE LOVE: POP UPS

#CWRETAIL

THE BEST OF POP UPS ACROSS EMEA

Pop-ups are back with purpose and personality. As summer kicks in, brands are heading where their customers already are, pairing limited drops with sun-soaked destinations. Jacquemus has teamed up with Ibiza's Cala Jondal for a beachside retail moment that blends fashion, lifestyle and seasonal luxury.

Covent Garden saw Pop Mart bring its cult Hirono art toys to life with an immersive pop-up experience.

Nike made a statement by taking over the former Microsoft space on Oxford Circus during Marathon weekend, right on pace with the city's runners and energy.

Rare Beauty teamed up with Sephora for its immersive Dreamland pop-up, giving fans an IRL dose of its viral product line-up.



Sephora x Rare Beauty Dreamland, Carnaby Street, London, UK



Jacquemus pop-up in Casa Jondal, Ibiza, Spain



Pop Mart x Hirono, Covent Garden, London, UK



Nike RunTown pop-up, Oxford Street, London



STORY THAT STANDS OUT:

CHANEL CHANCE STREET POP-UP

From April 24 to May 5, 2025, CHANEL transformed The Dream Factory at 4 Chance Street, Shoreditch, London into an immersive pop-up to celebrate the launch of its latest fragrance, Chance Eau Splendide. The event featured a vibrant pop art-inspired mural reflecting the signature purple hue of the new scent, setting the stage for a multi-sensory experience.

Inside, visitors engaged with interactive installations, including a Hall of Mirrors inspired by CHANEL's campaign film featuring Belgian artist Angèle. Attendees explored the full CHANCE fragrance collection at a dedicated discovery bar, sampled complimentary candy floss infused with the new scent, and participated in games offering exclusive prizes.





OUTRO

H1 2025 proved that success belongs to brands with strong identity, compelling experiences and cultural relevance.

Key forces reshaping EMEA retail:

- Experience-first real estate going beyond transactions.
- Brands are going big, bold and hyper-local with flagship strategies.
- Beauty continues its global takeover, claiming coveted retail space.
- Pop-ups aren't just temporary - they're strategic.

These trends will set the stage for a dynamic retail landscape as we move into the second half of 2025 - one where innovation, experience and consumer values drive growth and reshape physical spaces across EMEA.

Retail is no longer stationary.
it's constantly **in motion**.





MEET THE CROSS BORDER RETAIL TEAM

Our Cross Border Team specialises in helping brands expand internationally and enter local markets. We provide expert advisory services to ensure successful market entries and secure prime retail locations.

We support domestic brands with overseas expansion and guide international brands into local markets. Through our global network and industry expertise, we offer market research, site selection and lease negotiation services tailored to each brand's needs.

With a presence in over 60 countries, we help maximise brand success by providing data-driven insights and strategic support for every stage of the retail journey.

CAPABILITIES



**Expansion
Support**



**Market
Entry**



**Location
Strategy**



**Lease
Negotiations**

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