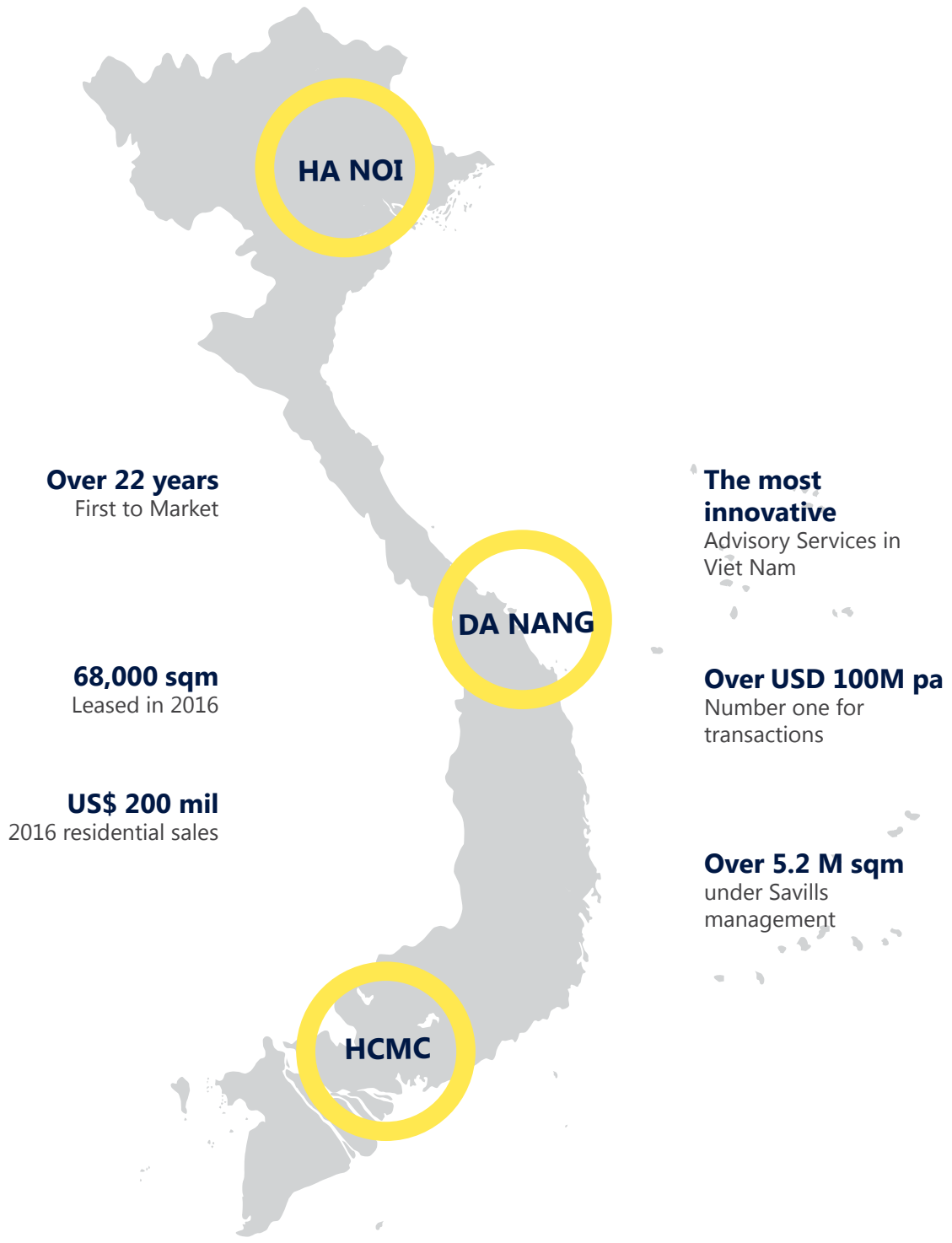


Viet Nam Retail

2017



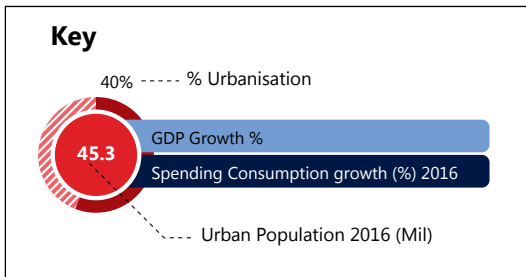
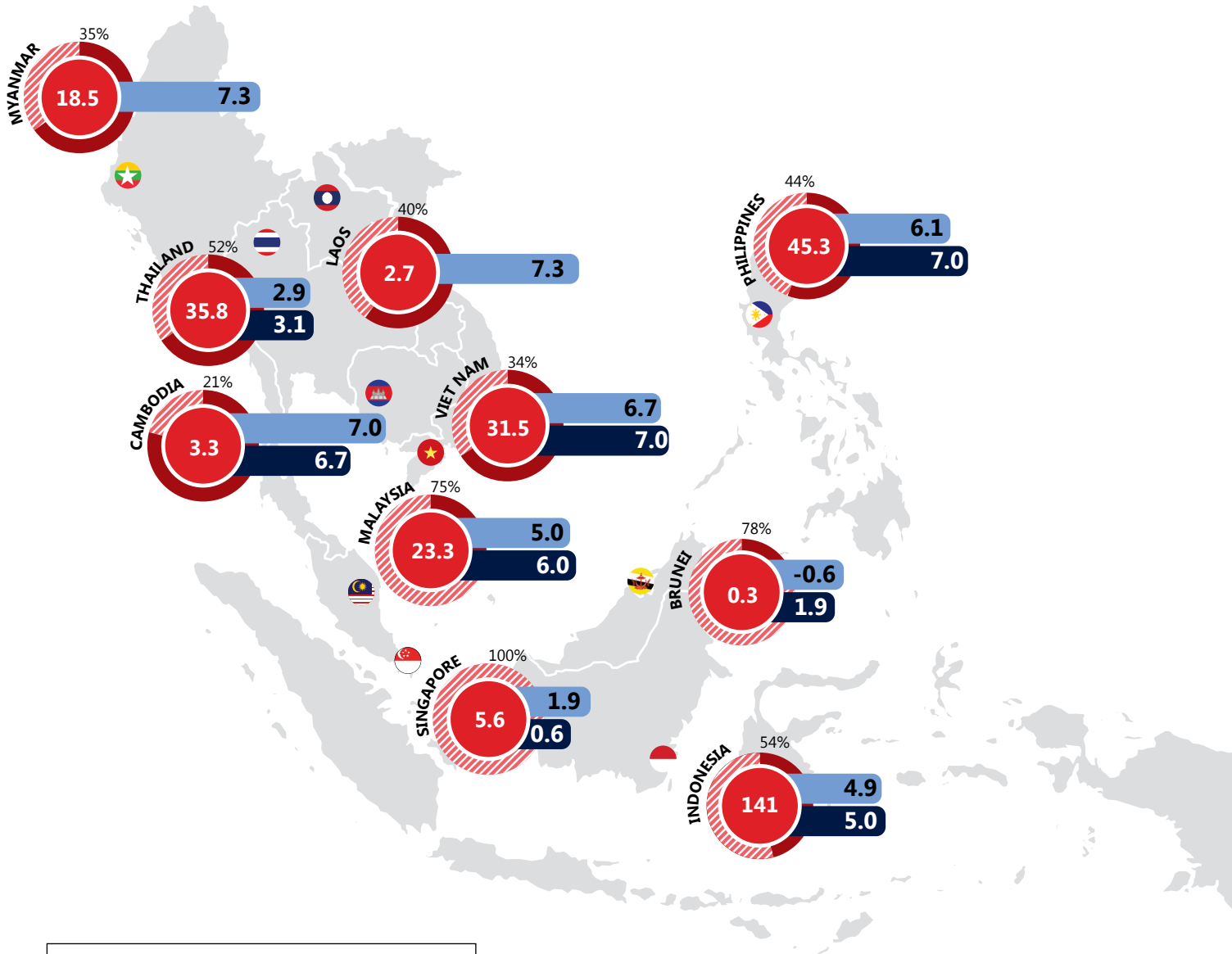
SAVILLS VIETNAM



EVOLVING

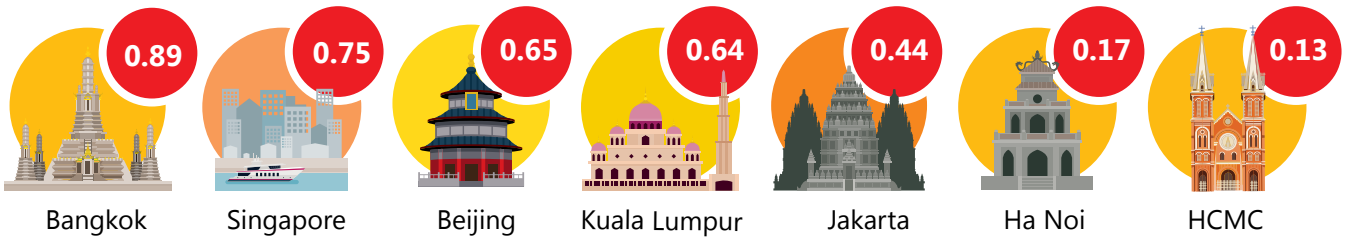
Modern retail supported by a large young population and an expanding economy

- 2nd highest urban population in the region and growing.
- Consistently high GDP growth.



EVOLVING

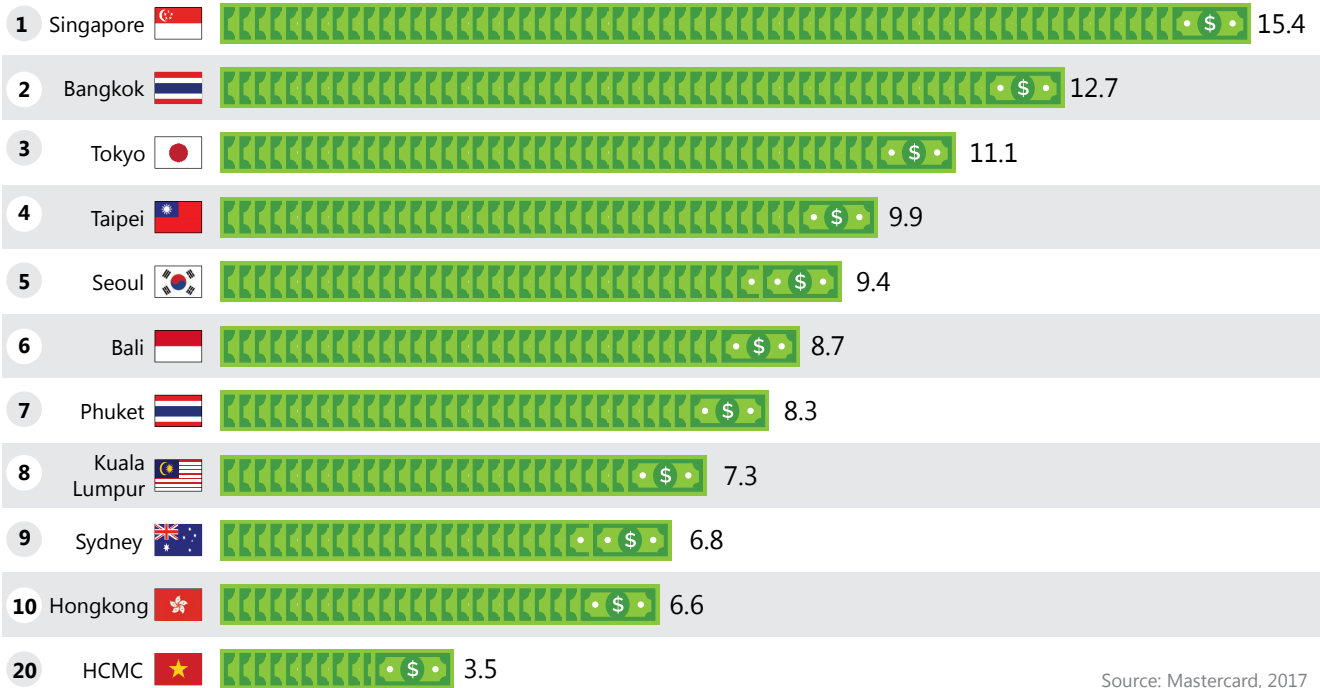
Low retail density with growth potential to catch regional peers.



Retail Density (m²/pax) | Source: Savills

Overpriced, Unavailable? Shoppercations Affecting Performance

Top ten APAC cities by tourist spend (US\$ billion)



Source: Mastercard, 2017



Source: GSO, 2017

Source markets

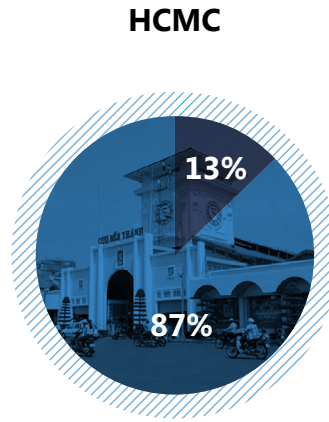
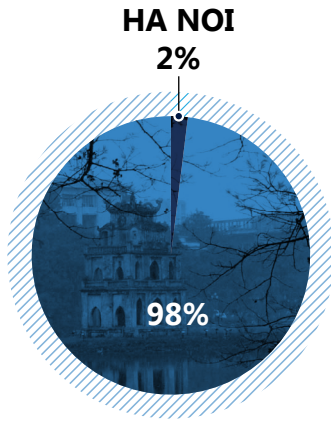


International visitor yearly growth up: **18%**.

Source: GSO, 2017

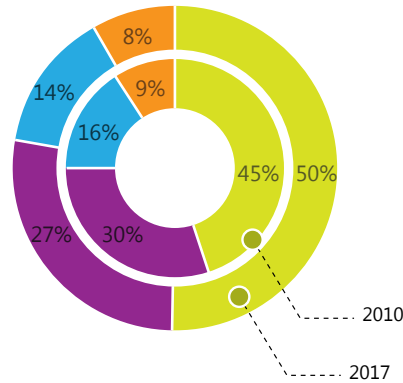
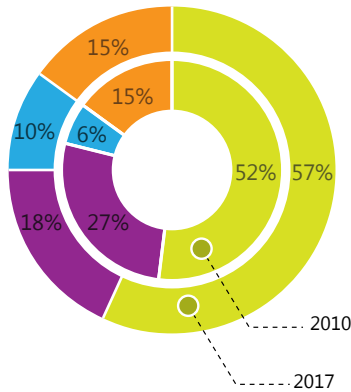
Ha Noi & HCMC forecast.

HCMC developing faster



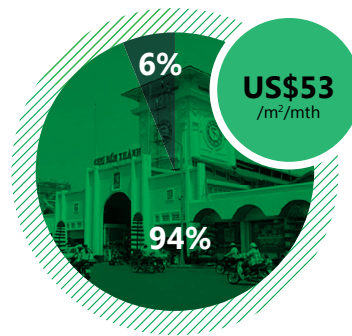
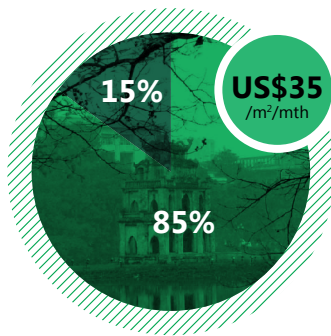
- Non CBD
- CBD

Shopping centres dominate



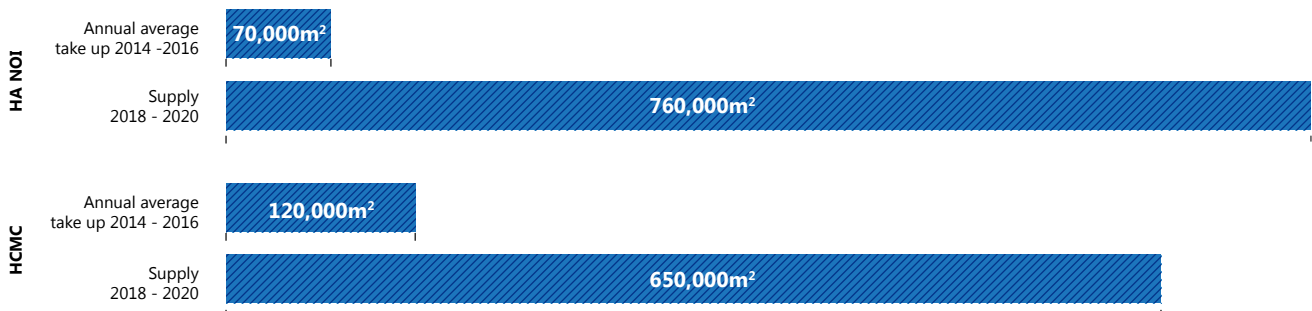
- Shopping Centre
- Supermarket
- Department Store
- Others

High CBD premium supply



- Vacant
- Occupancy

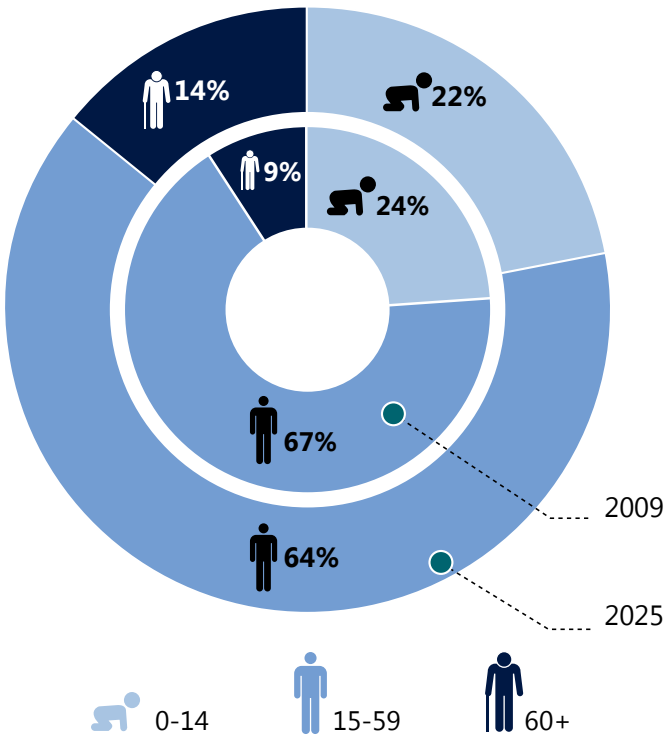
Abundant supply Abundant competition



EVOLVING

Demographics, Globalisation & Technology

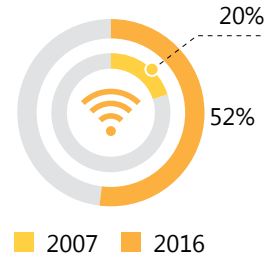
Large, growing youth skewed labour force changing demand dynamics



Source: GSO, 2016

Tech users

• Internet user (% Pop)



• Smartphone user (% Pop)



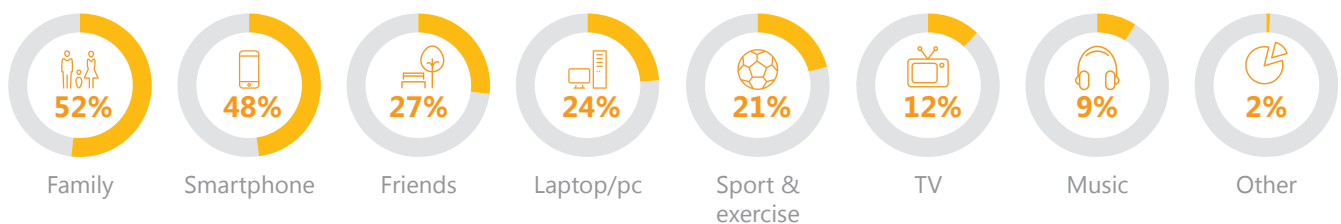
Source: Ministry of Communication, 2017

• Increasing credit card use



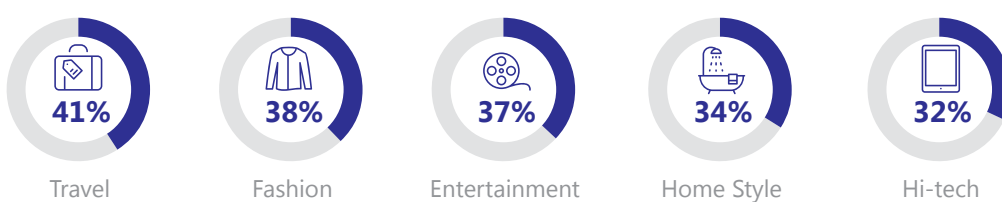
Source: Statebank, 2017

Spare Time Online



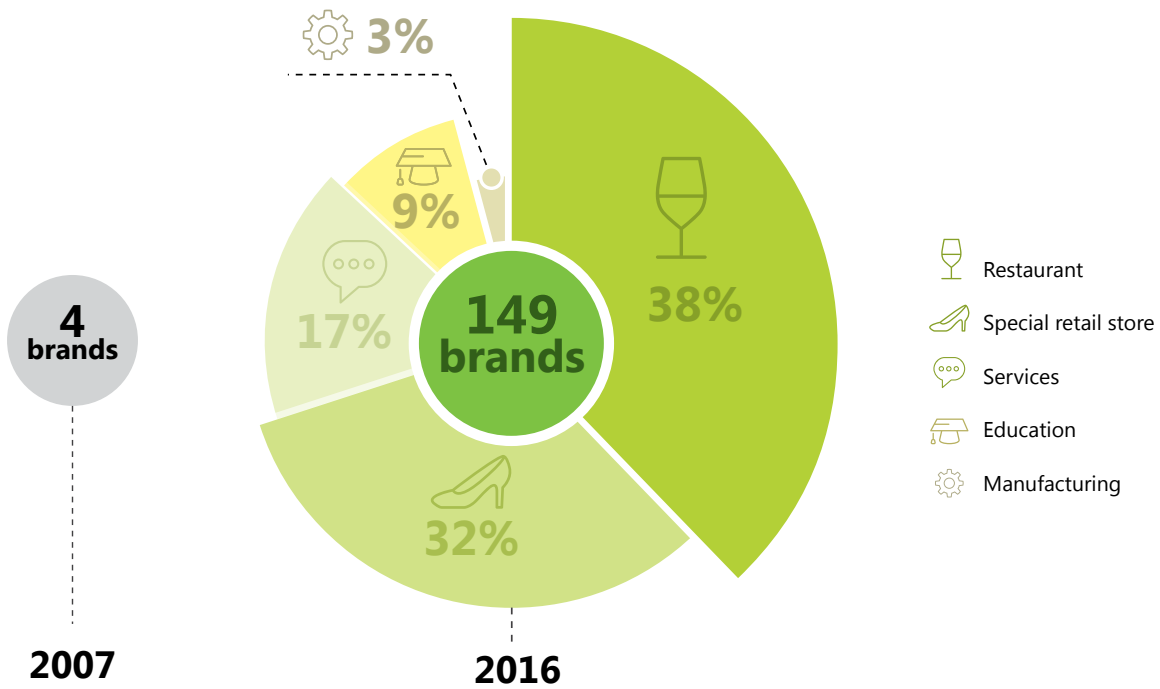
Source: Infocus Mekong, 2017

Spare Cash Spend



Source: Nielsen, 2016

Globalization and international exposure encourages diversity and more brands

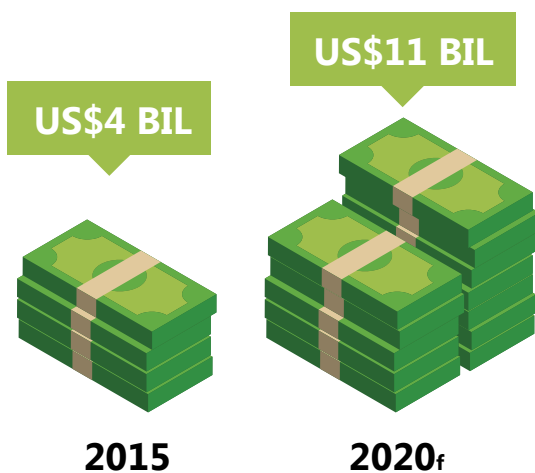


Global brands eyeing Viet Nam. F&B, retail and services leading the charge.

Source: National Office of Intellectual Property of Viet Nam

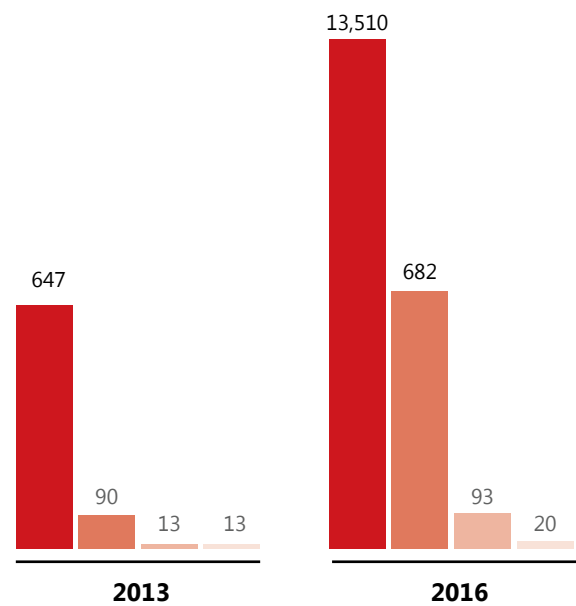
Click & Buy

Adapting to & loving online retail



Source: VECITA, 2017

E-commerce diversifying



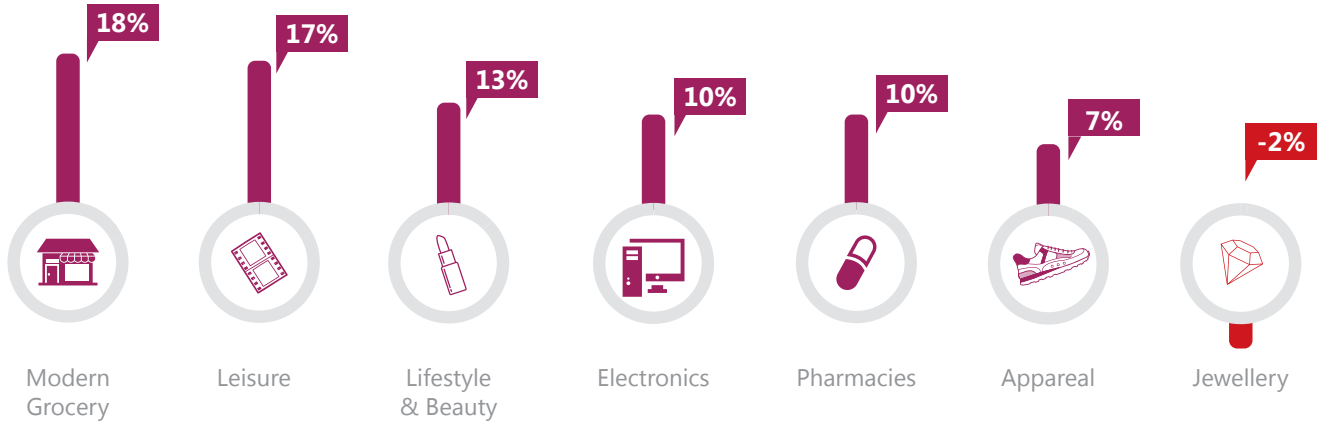
Online shop
Online trading

Online promotion
Online auction

Source: VECITA, 2017

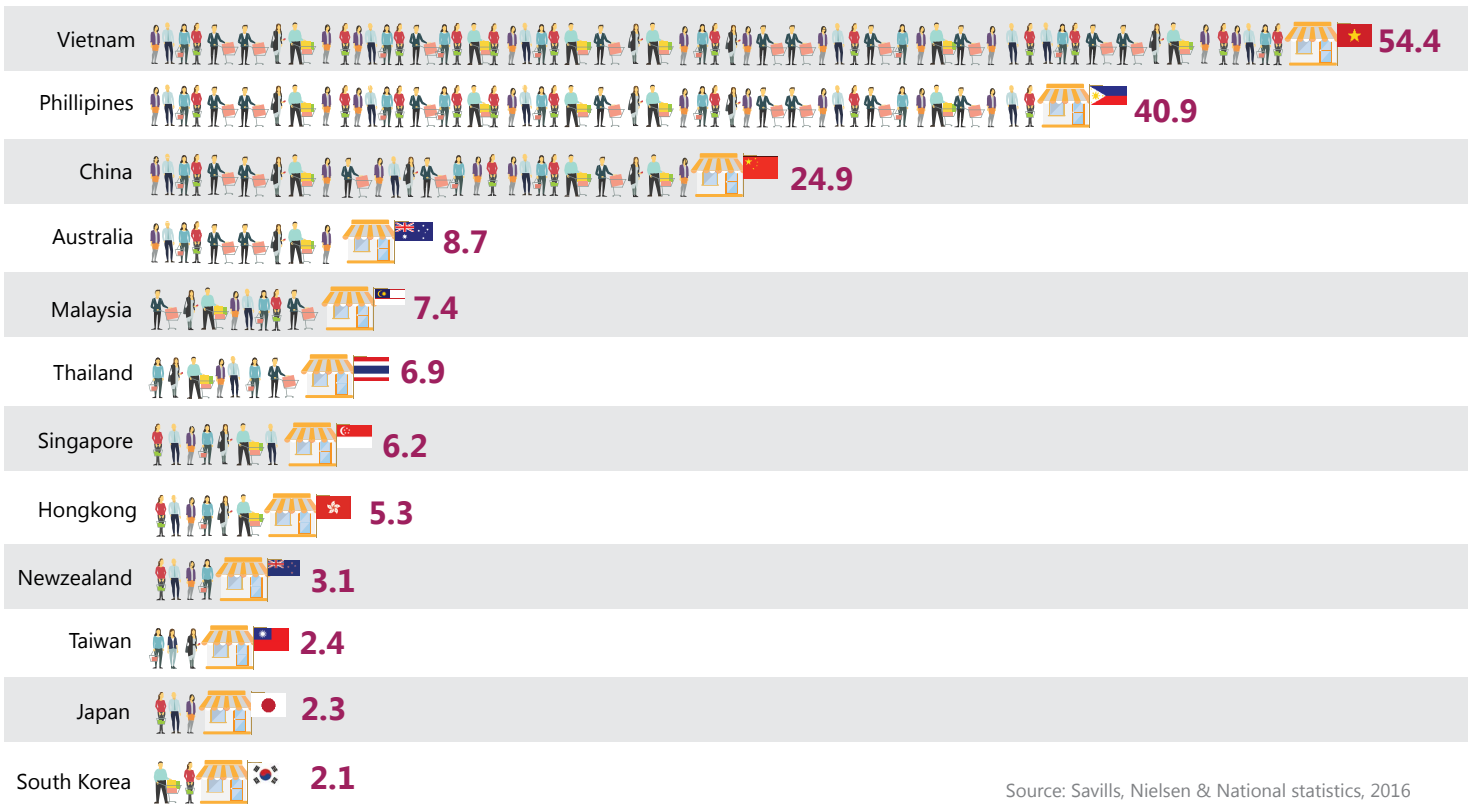
EVOLVING

Consumption 2011 - 2016



Source: Euromonitor, 2017

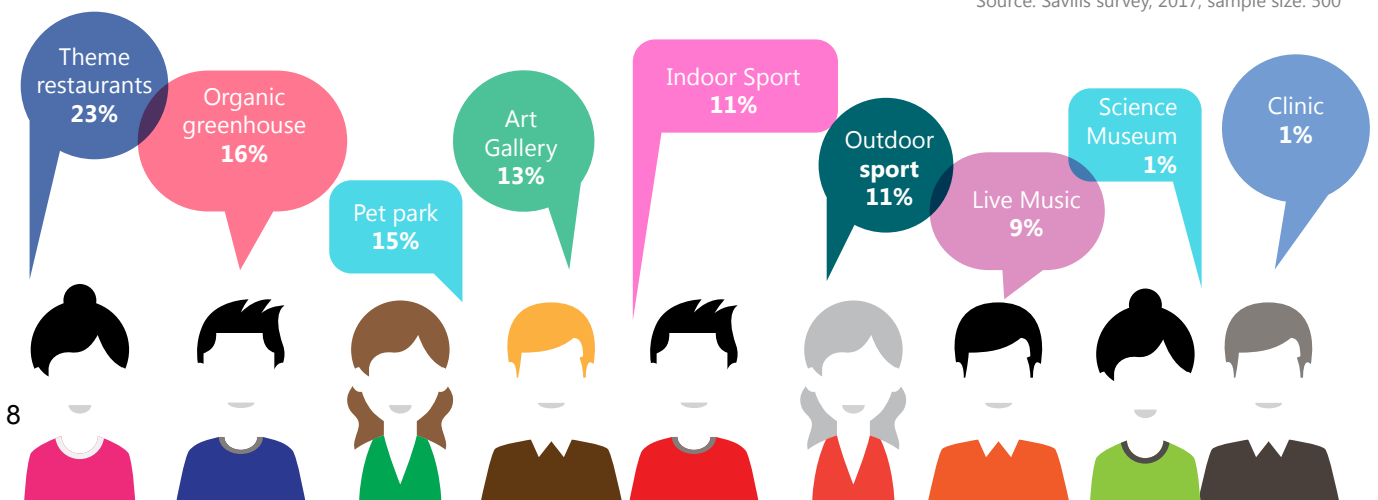
Convenience store density (,000/store)



Source: Savills, Nielsen & National statistics, 2016

Wanting More

Source: Savills survey, 2017, sample size: 500



AWARD WINNING INTERNATIONAL RECOGNITION



Best Property Consultancy in Viet Nam
8 consecutive years 2010 to 2018

Best Real Estate Agency in Viet Nam & APAC
8 consecutive years 2010 to 2017



Savills has topped the real estate agents/advisors in the 2017 UK Business Superbrand chart for the eighth consecutive year. Ahead of all industry competitors

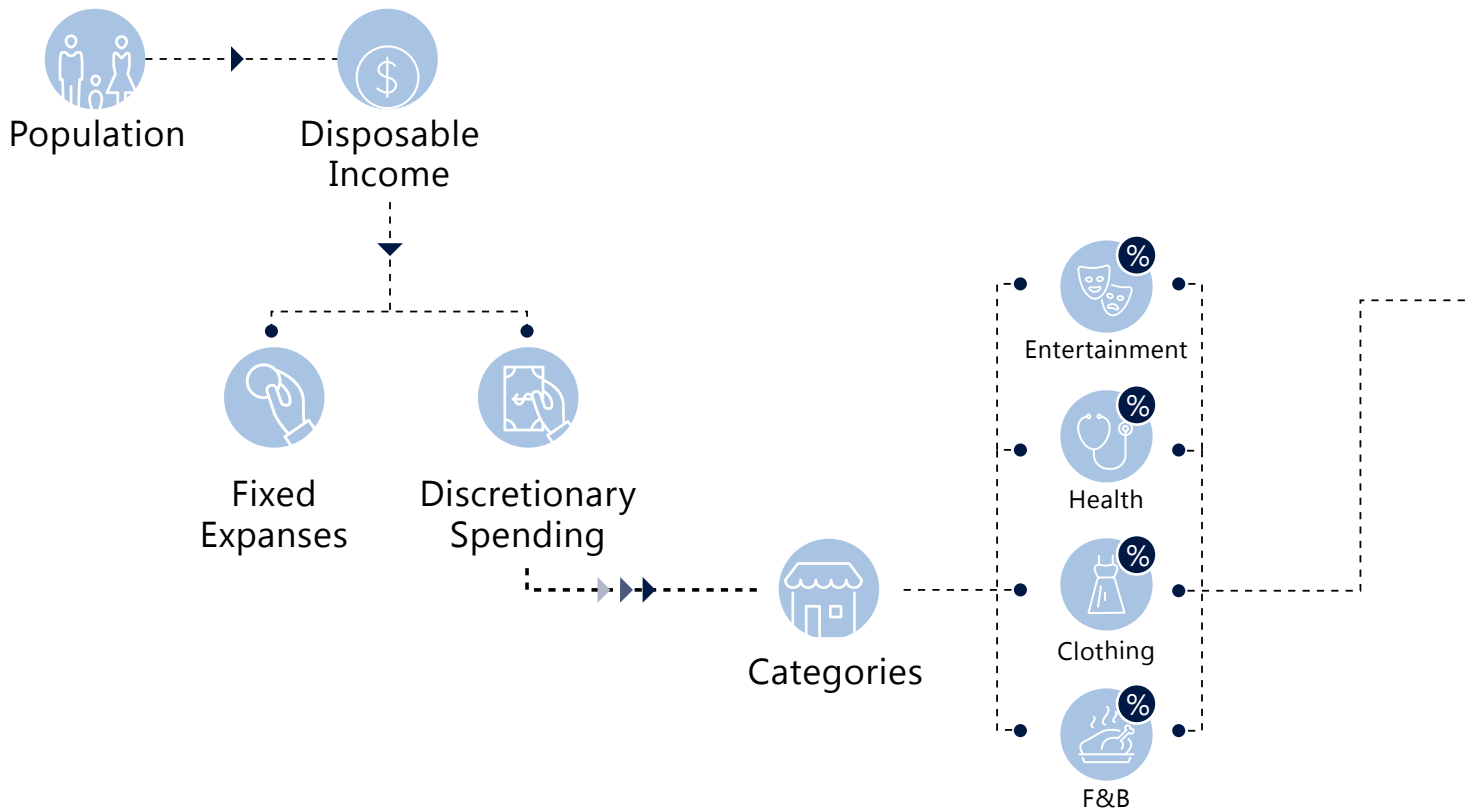


Savills retained its title as The Times Graduate Employer of Choice for Property for ninth consecutive year.

ECONOMIC RENT

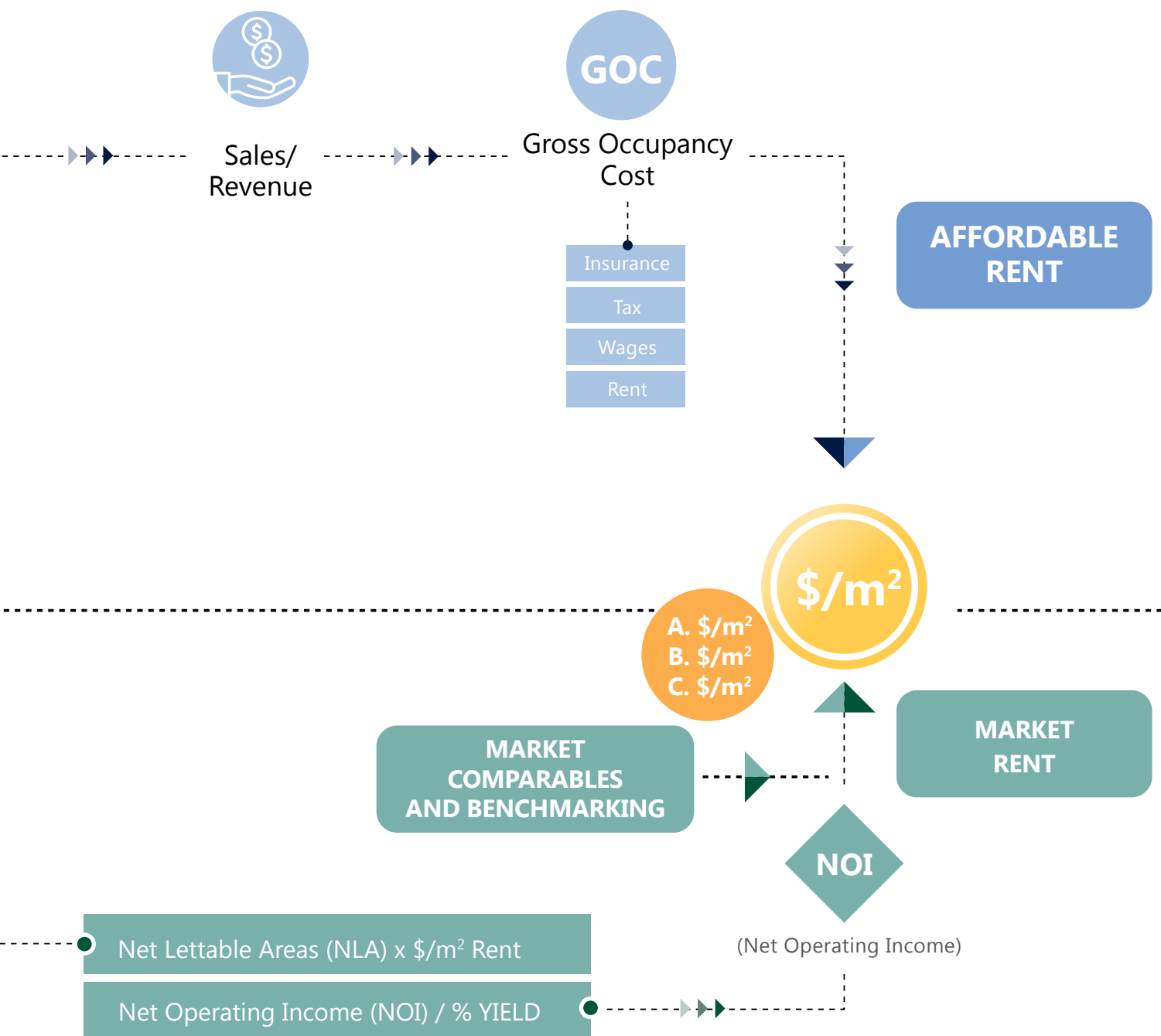
Sustainable retail development. When revenue exceeds gross occupancy cost. (GOC).

OPERATING




DEVELOPMENT







OUR SERVICES

Our services are delivered by people who combine entrepreneurial spirit and a deep understanding of specialist property sectors with the highest standards of client care. We help our clients to fulfil their real estate needs – whatever and wherever they are.


 ADVISORY SERVICES	<ul style="list-style-type: none">• Market Research General & Specific• Economic and Demographic studies• Conceptual Development Recommendations	<ul style="list-style-type: none">• Feasibility Studies• Highest and Best Use Study• Development Review• Valuation	

 AGENCY	 Retail	 Office	 Industrial

 RESIDENTIAL	<ul style="list-style-type: none">• Project Sales and Marketing Strategy• International Sales	<ul style="list-style-type: none">• Residential Sales• Residential Leasing• Landlord Representative	

 PROPERTY MANAGEMENT	<ul style="list-style-type: none">• Pre-Operations Management Consultancy• Property & Asset Management	<ul style="list-style-type: none">• Facility Management• Residential - Commercial - Industrial• Property Management Training	

 HOTEL & LEISURE	<ul style="list-style-type: none">• Operator Selection	<ul style="list-style-type: none">• Management Agreement negotiation	

 INVESTMENT	<ul style="list-style-type: none">• Strategy Project Positioning• Stakeholder Engagement Structuring	<ul style="list-style-type: none">• Acquisition and Sales	

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