

MAGAZINE

ROS MAGAZINE
ISSUE Nº 12



CREATING PREMIUM OUTLET SHOPPING DESTINATIONS ACROSS EUROPE

ALGARVE / BUDAPEST / GDANSK / GEISLINGEN / KRAKOW /
LUXEMBOURG / POLGAR / SOLTAU / SOSNOWIEC / WARSAW /
ZAGREB / ZARAGOZA

retail
outlet
shopping



ROS



“Happiness is not in money but in shopping.”

Marilyn Monroe, American actress and female icon

Welcome

Dear reader,

over the last decade, ROS Retail Outlet Shopping has grown to become one of Europe’s top 5 outlet operators. Today, ROS manages 12 premium outlet destinations with further centre extensions and a new development in the pipeline. On the following pages, you will get an insight into the European outlet market, the ROS approach and initiatives in light of fast changing consumer behaviour, increasing digitalisation and corporate social responsibility. Enjoy the reading!

“Especially in uncertain times like these, the outlet concept demonstrates its resilience and strong market position, adapting rapidly and leading new and evolving trends. At ROS, we constantly push ourselves to drive value for our brand partners, investors, customers and other stakeholders by creating unique and sustainable premium outlet shopping destinations.”

Thomas Reichenauer & Gerhard Graf,
ROS Co-Founders & Managing Directors



What's up?

THE EUROPEAN OUTLET REMAINS A STRONG AND APPEALING MARKET THAT OUTPERFORMS WIDER RETAIL

Despite uncertainty and social and economic volatility due to the scourges of wars and the effects of inflation weighing heavily on households and consumers, the European outlet market remains buoyant.

There are currently around 200 operating outlet centres in Europe, covering approximately a gross lettable area of 3.6 million sqm. The good prospects of outlets, fuelled by the stronger price conscious shopping behaviour, can be explained by their USP.

The outlet price policy and the unique high quality shopping experience are resonating with shoppers, who more and more choose them as the perfect day-out destination.

However, a number of challenges must be addressed. Outlet operators need to integrate both greater brand collaboration and customer centricity in their strategy, as well as address the current retail staff shortage. Not forgetting the growing role of ESG, which requires urgent and decisive actions.

ROS Retail Outlet Shopping is proud to have registered a strong +18% in sales year to date in 2023 in comparison to 2022. A slight loss in traffic is compensated with a higher average spend per visitor.



ROS European Outlet Market

What is unique about ROS as an outlet operator?

DRIVING ASSET VALUE THROUGH INTEGRATED CENTRE MANAGEMENT IN CONSIDERATION OF PROPERTY LIFECYCLE AND POTENTIAL ANALYSIS

ROS Retail Outlet Shopping develops, manages and operates designer outlets and innovative outlet shopping experiences over the complete real estate lifecycle. The integrated centre management is ROS core business and provides excellent services to brand partners, their employees, towns, communities, tourism partners, investors and further stakeholders. Based on the local centre

characteristics, the stage in the property's lifecycle and the catchment potential, ROS develops for each centre an individual Lifecycle Asset Value Creation strategy.

In this context, ROS is pleased to rank as Europe's 4th largest operator as well as the 6th best capable European Outlet Operator.

“Whosoever desires constant success must change his conduct with the times.”

Niccolò Machiavelli,
Italian diplomat,
author and philosoph

Designer Outlet
Warszawa.
Europe's third
best outlet centre.
Ecostra OCPR 2022



ROS Asset Value Creation

Sucess Story

ROS COMPANY
MILESTONES



500k

Active VIP customers

Database

25 million customers

ANNUAL ACROSS THE
ROS PORTFOLIO

ACTIVE IN

8 EU countries

BELGIUM / CROATIA / GERMANY /
HUNGARY / ITALY / POLAND /
PORTUGAL / SPAIN

+ 18 % sales growth

YTD 2023 vs. 2022

11

Centre
Takeovers

LANDQUART
PARNDORF
BUDAPEST
BRUGNATO
GEISLINGEN
WARSAW
GDANSK
SOSNOWIEC
PARMA
POLGAR
LUXEMBOURG

215,000 sqm

OPERATING GROSS LETTABLE AREA

260k

INSTAGRAM FOLLOWERS

110+ Employees

Nº 4

4th largest European
Outlet Operator based
on shares in % of
operating outlet retail
space in Europe.

Ecostra Research, October 2023

5

Centre
Openings

SOLTAU
BAD MUENSTEREIFEL
ALGARVE
CROATIA
ZARAGOZA

995k

FACEBOOK FANS

23 awards

1,500+

Leasing agreements

NEW LEASES / RENEWALS / POP UPS / ASSET
MANAGEMENT MOVES / STORAGE & KIOSK

4.9 million

web visitors per year

On a journey towards further growth

SUCCESSFUL RELAUNCH OF DESIGNER OUTLET LUXEMBOURG AND UPCOMING EXPANSION PLANS

ROS currently manages 12 outlet centres in Europe with 215,000 sqm gross lettable area. Following the launch of its 'BOLD' strategy at the beginning of 2023, the operator is taking a holistic approach to adapt each centre to the fast shifting consumer demands and individual stage of the asset lifecycle.

One year after its takeover in 2022 by ROS, Designer Outlet Luxembourg, located in Messancy, Belgium, shows a steady growth reinforcing its convenient position at the crossroads of Luxembourg, France and near Germany. With a new centre atmosphere and a more

cross-border marketing approach, the premium outlet village has achieved record sales with double-digit growth and expects further improvements. The immediate vicinity is currently under full development with new leisure and hotel facilities.

Future expansion plans for ROS focus on the centre extensions of Designer Outlet Gdańsk, Designer Outlet Croatia, Designer Outlet Algarve and the opening of the new development Designer Outlet Kraków. After completion, ROS will grow by almost 40,000 sqm gross lettable area.



Designer Outlet Luxembourg, the Premium Outlet Village for Luxembourg, Belgium, France and Germany.

Trading-up strategy and expansion plans

ROS RETAIL OUTLET SHOPPING IS CURRENTLY DEDICATED TO THE DEVELOPMENT OF ITS PORTFOLIO OF DESIGNER OUTLETS IN EUROPE WITH THREE CENTRE EXTENSIONS AND A COMPLETELY NEW DEVELOPMENT WITHIN THE NEXT TWO YEARS AS WELL AS THE UPGRADE OF ITS BRAND MIX.

THOMAS REICHENAUER
Co-Founder & Managing Director at ROS:

“Our centres are performing well and strongly and this is demonstrated by the expansion plans of several of them. It is time to make existing successful locations like Designer Outlet Gdańsk, Designer Outlet Algarve and Designer Outlet Croatia, bigger and even more successful. We are also really excited for our fourth project in Poland. Located in the most visited and vibrant city in the country, we are confident Designer Outlet Kraków will be a very popular and strong destination as well as a pivotal

component of the large mixed-use complex being developed, which will also include two retail parks.

Designer Outlet Gdańsk to be ‘New Meeting Place’ on the Baltic coast

With an additional 2,000 sqm of GLA, Designer Outlet Gdańsk is under construction since last September and will be completed by the end of 2024, making it the flagship outlet destination on Poland’s Baltic coast. The centre extension will host almost 20 additional stores, including a new modern food court, providing customers with a new dimension of shopping experience. The leasing process for the retail part is already in progress and aims to bring together a brand mix that will meet customers’ expectations of high quality and well recognised brands. The food court will accommodate national food concepts with a fresh and healthy food combined with international well-known F&B brands.

Currently, Designer Outlet Gdańsk hosts 100 stores with fashion and lifestyle brands like Boss, Pinko, Calvin Klein, Guess, Karl Lagerfeld, Marc O’Polo, Kazar, Levi’s as well as Nike, Adidas, Puma, New Balance and many more.



Designer Outlet Gdańsk new food court, Opening Autumn 2024



New plaza in the centre extension of Designer Outlet Algarve, Opening 2025

The centre extension is now in its second stage after the improvement of the entrance in 2021. The Nike store was also almost doubled in size, making it the brand’s largest outlet store in northern Poland. After full completion, the centre will have a total gross lettable area of almost 20,000 sqm.

Designer Outlet Algarve will turn into the leading ‘Premium Outlet Village’ in Portugal

The premium outlet in the Algarve is planning to be expanded by approximately 4,000 sqm of gross lettable area by 2025, adding 25

new and attractive stores to the current offer of well renowned brands such as Boss, Tommy Hilfiger, Lacoste, Levis, Calvin Klein, Bimba y Lola, Guess, as well as Adidas, Puma, Asics and Timberland. Recently, the premium outlet village has also welcomed several new premium brands like Karl Lagerfeld, Façonnable, Hackett London and Gant.

After realisation of the centre extension, Designer Outlet Algarve will host more than 80 fashion and lifestyle stores on a gross lettable area of 17,000 sqm, while upgrading its premium brand portfolio and

reinforcing its pole position in the south of Portugal and Spain. The new premium village architecture will also ensure an enhanced shopping experience among residents and tourists.

Designer Outlet Algarve is the largest outlet village in the region and benefits from the large influx of national and international tourists of approximately 5 million per year. Faro Airport is only a 15-minute drive away and the Spanish border is a 40-minute drive away.



Designer Outlet Algarve Boulevard Opening 2025

Designer Outlet Croatia will become the 'Flagship Shopping Destination' at the crossroads of Southeast Europe

Designer Outlet Croatia has also announced plans for further development with upcoming centre extension and new retail park. Despite the challenges from last years, such as the pandemic, the earthquakes in the country, the introduction of the euro as new currency and high inflation, Designer Outlet Croatia has demonstrated an outstanding performance with double-digit growth in all indicators.

These results have definitely paved the way for the centre's extension by further 5,000 sqm, 30 new attractive stores and 400 additional parking spaces. The current brand mix of Designer Outlet Croatia already includes premium fashion and lifestyle brands such as Boss,

Tommy Hilfiger, Calvin Klein, Ted Baker, Patrizia Pepe, Adidas, Puma, Replay, Guess, Lacoste, and will be further upgraded to fulfil customers' demands. After the centre extension, the premium outlet village will be home to 90 stores on a gross lettable area of 21,500 sqm.

The construction of the retail park, adjacent to Designer Outlet Croatia, with a gross lettable area of 10,000 sqm and 12 new stores is also in the pipeline and scheduled to open at the same time. Among the major novelties this year are already the new Burger King with the first drive-thru of Croatia and the Shell petrol station. The project will not only ensure that visitors enjoy an exceptional shopping experience in a unique shopping destination with everything they need in one place, but will also push Designer Outlet Croatia forward as a premium cross-border outlet shopping destination.

Designer Outlet Kraków kicks off construction works

The new outlet shopping destination for the Kraków and Lesser Poland region is officially taking shape. On 9 October 2023, representatives of KG Group and ROS signed the foundation act and officially inaugurated the construction works at Designer Outlet Kraków. This is the fourth project in Poland managed by ROS and is set to open in spring 2025.

Designer Outlet Kraków will host more than 100 outlet stores on a gross lettable area of 20,000 sqm. Cafés and restaurants will complement the offer and make Designer Outlet Kraków the new smart shopping destination for the region. Located on the banks of the Vistula River, Kraków is not only the most visited and vibrant city in the country for local residents as well as domestic and international tourists, but also one of the most important economic centres with a very well established trade tradition. Designer Outlet Kraków will benefit from an exceptional location in the city centre at one of the most popular arteries in Kraków with excellent road connections and almost 5 million inhabitants in the catchment area, supported by the growing residential developments in the vicinity.



Inauguration of the construction works of Designer Outlet Kraków with representatives of KG Group and ROS Retail Outlet Shopping



Designer Outlet Kraków. Opening 2025



We love
Outlet
Shopping

**Discover 12
Premium Outlet Shopping
Destinations across Europe**

ALGARVE
BUDAPEST
GDANSK
GEISLINGEN
KRAKOW
LUXEMBOURG

POLGAR
SOLTAU
SOSNOWIEC
WARSAW
ZAGREB
ZARAGOZA

ROS  retail
outlet
shopping

À propos... What are Designer Outlets?

GREAT BRANDS FOR GREAT PRICES IN AN INSPIRING ATMOSPHERE

Designer Outlet villages or centres are regional shopping destinations with a unique offer of designer, fashion and lifestyle brands, 30-70% off, all year round. Their distinctive (open-air) architecture, brand partner management, customer services, retail standards, marketing and centre entertainment are singular characteristics.

While the UK is one of the most saturated outlet markets in Europe, Germany, France, Spain and Eastern Europe show the greatest potential.

ROS responds to the market challenges and develops, advises, operates and relaunches inspiring Designer Outlet villages and centres, establishing a win-win situation for customers, brand partners, investors and communities.

DESIGNER OUTLET CONCEPT CHARACTERISTICS

- Special type of shopping centre from 10,000 sqm GLA
- Off-price shopping concept with sale of last season collections, samples and surplus production of designer, fashion and lifestyle brands
- Catchment area of at least 2 million inhabitants within up to a 120-minute drive time
- Contractually fixed reductions of minimum 30% off compared to the regular retail price (RRP)
- Village-style architecture enriched by typical elements of the region
- Good highway access
- Excellent retail and service standards
- Near a metropolitan region
- Additional tourism potential beneficial



*“Whoever
said money
can’t buy
happiness
simply
didn’t know
where to go
shopping.”*

Bo Derek,
American actress & model

The new outlet generation

OUTLET SHOPPING FOR NEW RETAIL REAL ESTATE CONCEPTS AND REJUVENATION TREATMENT OF MATURE SHOPPING CENTRES

The new generation of outlet villages and centres enriches the outlet shopping concept with convenience shopping and a strong leisure & food offer. The objective is to become a regional shopping destination and a meeting point for the catchment area.

Designer Outlets are considered a successful rejuvenation tool for existing retail properties, thus revitalising city centres that are facing challenges arising from demographic and social change, neglect of urban spaces as well as lack of financial resources. Lately, there has been a growing trend to convert existing shopping centres into hybrid centres with an outlet area.

ROS considers itself a partner to cities, communities and investors. Whether it is hybrid shopping centres, city quarters, arcades or inner-city outlets as well as mixed-use developments, the main focus of ROS is their revival and economic benefits for all parties.

NEW OUTLET CONCEPT CHARACTERISTICS

- Gross lettable area from 6,000 sqm GLA
- Off-price shopping concept with sales of last season collections, samples and surplus productions of designer, fashion and lifestyle brands in consideration of local retail landscape
- Catchment area of a minimum of 2 million inhabitants within a 90-minute drive
- Contractually fixed reductions of minimum 30% off compared to the regular retail price (RRP)
- Agglomeration of properties and concentration in one project company
- Uniform look & feel for the outlet area
- High retail and service standards for the whole scheme
- Building permission for retail of all properties



“Raising the bar, rewriting the rules.”
Gen Z quote



ROS Centre Management



Pan-European Leasing

ASSET MANAGEMENT WITH AN UPGRADED BRAND MIX TO TAP THE FULL CATCHMENT POTENTIAL OF EACH OUTLET CENTRE

The world of retail is always on the move, especially with the rise of digitalisation and evolving customer behaviour. Nevertheless, the outlet store channel has proven to be a profitable sales channel and is increasingly being integrated into the omnichannel approach of national and international fashion brands.

"A balanced brand and category mix as well as a long-term cooperation with our partners are essential for the success of a Designer Outlet. With our 'trading-up' strategy, we aim to upgrade our brand portfolio in order to address the increasing interest from both customers and new brands."

Mireia Rodríguez Burguera,
Leasing Director,
ROS Retail Outlet Shopping

The ROS leasing team has more than 1,500 brand partners in its portfolio and is growing every day. Thanks to a European key account structure, the team maintains a close brand partnership and is part of a European fashion retail

network. The constant exchange and the permanent monitoring of the European outlet market creates unique opportunities. Considering each individual outlet location, the catchment potential as well as the local retail density and the sensitivity of the target brands, the team develops a tailor-made leasing strategy with an asset management programme for brand partners and investors. Green leases and the omnichannel consideration are now market standards.



ROS
Leasing



ROS Strong Brand Partnership

MUTUAL TRUST BETWEEN ROS AND OVER 1,500 BRAND PARTNERS IN EUROPE

Why food matters

MODERN FOOD COURTS AS ACTIVE ELEMENTS TO CREATE MEETING PLACES FOR FAMILY & FRIENDS

The combination of dining and retail is today a popular demand from customers who wish not only to enjoy a good meal or drink, but also to meet and have fun with family and friends.

Designer Outlets are regional shopping destinations by nature, so the F&B offer is more decentralized as a 'pit stop'. Some locations have

the potential to become more daily food destinations, taking here a centralized approach with a Food Court. ROS pursues a site-specific F&B strategy, taking into account the eating habits and opportunities of each location. The main objective is to develop a F&B offer that meets the culinary needs of current and potential customers in line with emerging trends.



“Food can bring people together in a way nothing else could.”

Yotam Ottolenghi,
Israeli-born British chef,
restaurateur and food writer



ROS Food & Beverage

Retail Excellence

CREATING A PERFECT RETAIL FRAMEWORK TO SUPPORT BRAND PARTNERS AND DRIVE SALES DENSITY

The role of each store is crucial to the success of Designer Outlets. Therefore, maintaining a strong brand partner relationship has been always the difference with the classic shopping centre business due to the outlet concept. ROS provides digital retail tracking, communication and recruitment tools to enable a data-driven retail management as well as support for brand partners in all retail areas. But also 'green retailing' has changed the requirements of the sector.



The ROS retail team is in permanent contact with all brand partners and organises individual business review meetings based on the latest store data to improve the performance in a sustainable way. An agreed package of measures in retail, marketing and facility with mutual promise ensures a successful long-term business relationship. Regular Shop Manager Meetings are held to inform and stimulate a joint understanding in the outlet. The ROS Retail Academy in each centre provides standards, retail trainings and tools focused on

motivating shop staff and driving performance on an ongoing basis. Overall objective is to create a win-win situation for brand partners, the operator and the landlord.

“Especially in uncertain times, consumers are increasingly seeing the real value of Designer Outlets. Our mission is to create unique shopping destinations that meet customer and brand expectations.”

Elke Schöpf,
Retail & Operations Director,
ROS Retail Outlet Shopping



The joy of outlet shopping

DRIVING TRAFFIC, BRAND AWARENESS, SALES, CUSTOMER LOYALTY, DIGITAL & SOCIAL ENGAGEMENT

Designer Outlets are regional shopping destinations. Their positioning is determined by the brand and category mix, architecture and location.

loyalty programmes and events. In addition, we must not forget the emotional positioning, especially in difficult times. With innovative initiatives, leisure activities and a

The ROS marketing strategy follows a 'think global, act local' approach to tap the full potential of each location to create a unique and desirable shopping destination. An individual centre marketing vision and action plan is therefore developed with local agencies to drive traffic, brand/location awareness, average spend and loyalty. In this regard, the latest changes and trends in media and shopping behavior are taken into account. Activities range from classic marketing through radio, print and TV to digital marketing and social media, PR, POS, centre decoration,



welcoming centre atmosphere, ROS aims to bring back the 'joy of outlet shopping' to customers and position each location as an authentic, reliable and vibrant destination brand.

"We must combine all marketing strategies to create a 'phygital' emotional shopping experience and offer our customers a unique shopping destination where they wish to be and have a good time."

Guido Assmann,
Marketing Director,
ROS Retail Outlet Shopping

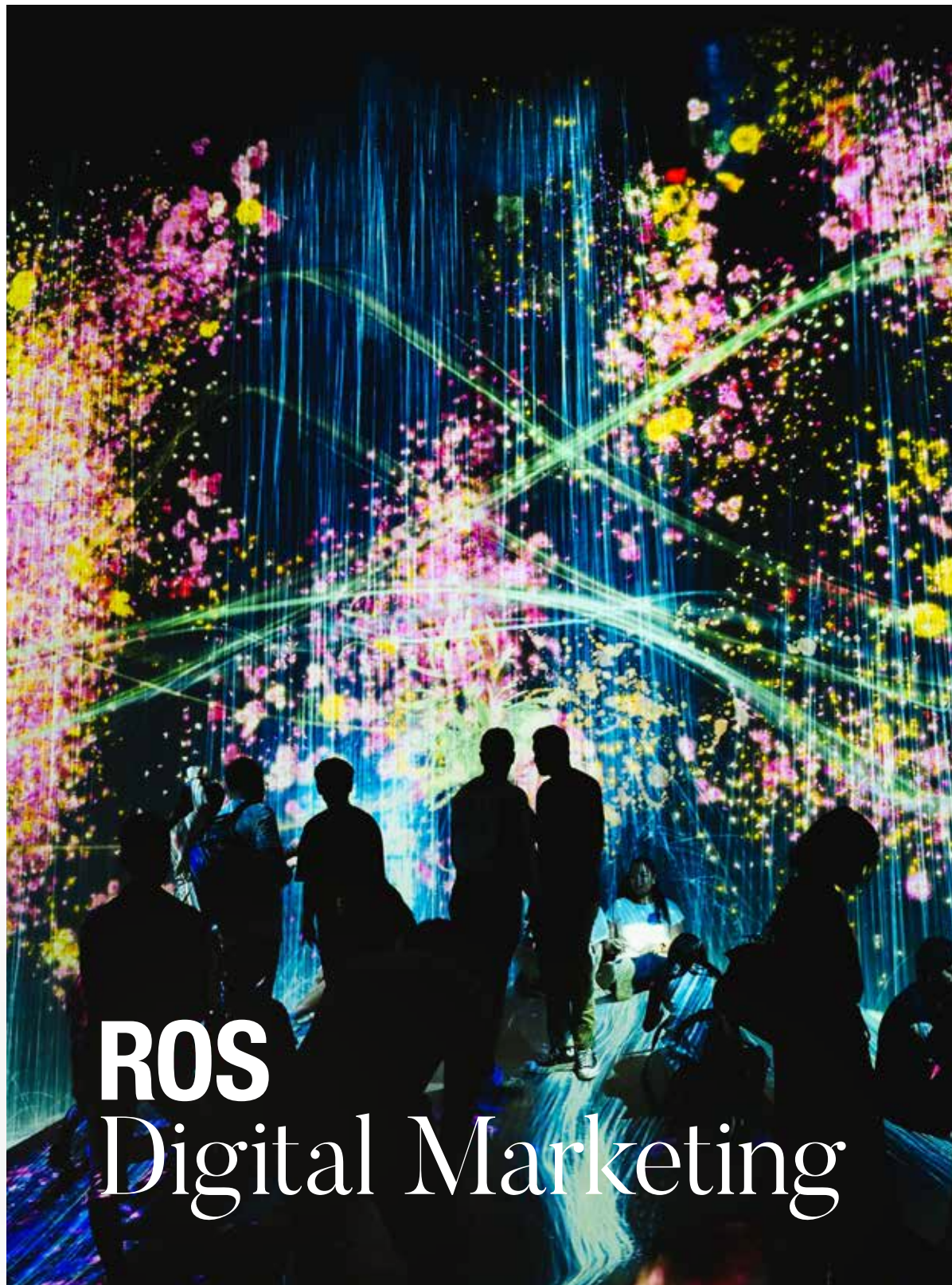
SALE

UP TO
-70%

ROS
Marketing

**Designer Outlet
Algarve
X Vogue**





ROS Digital Marketing

‘Phygital’ shopping

USING DIGITAL MARKETING AND NEW RETAIL TECHNOLOGIES TO IMPROVE THE OUTLET CUSTOMER JOURNEY

Designer Outlets are adapting to the importance of digital media to attract, excite, convince and drive customer loyalty. Following an omnichannel approach, the aim of



ROS is to convert internet users into shoppers and retain them. To this end, current online trends are taken into account: Content Marketing, SEO/SEM, Mobile Marketing, Animation, Native Ads, Loyalty, Big Data, Social Media, Retargeting and Individualisation.

Premier Outlet Budapest achieved remarkable results with its Premium Club Loyalty program, powered by Coniq, during the 2023 Summer VIP Event, registering a staggering 721% increase in loyalty program spending and a 40% rise in membership sign ups.

Moreover, the rising use of QR code technology also enables a sustainable way of navigation, information, engagement and experience. Digital signage, promotions and unique events like the Designer Outlet Algarve X Vogue collaboration enhance the shopping experience onsite and transform the commercial space into ‘phygital’ experiences.

“You’ve got to start with the customer experience and work back toward the technology – not the other way around.”

Steve Jobs,
Co-Founder of Apple

Comeback of tourism

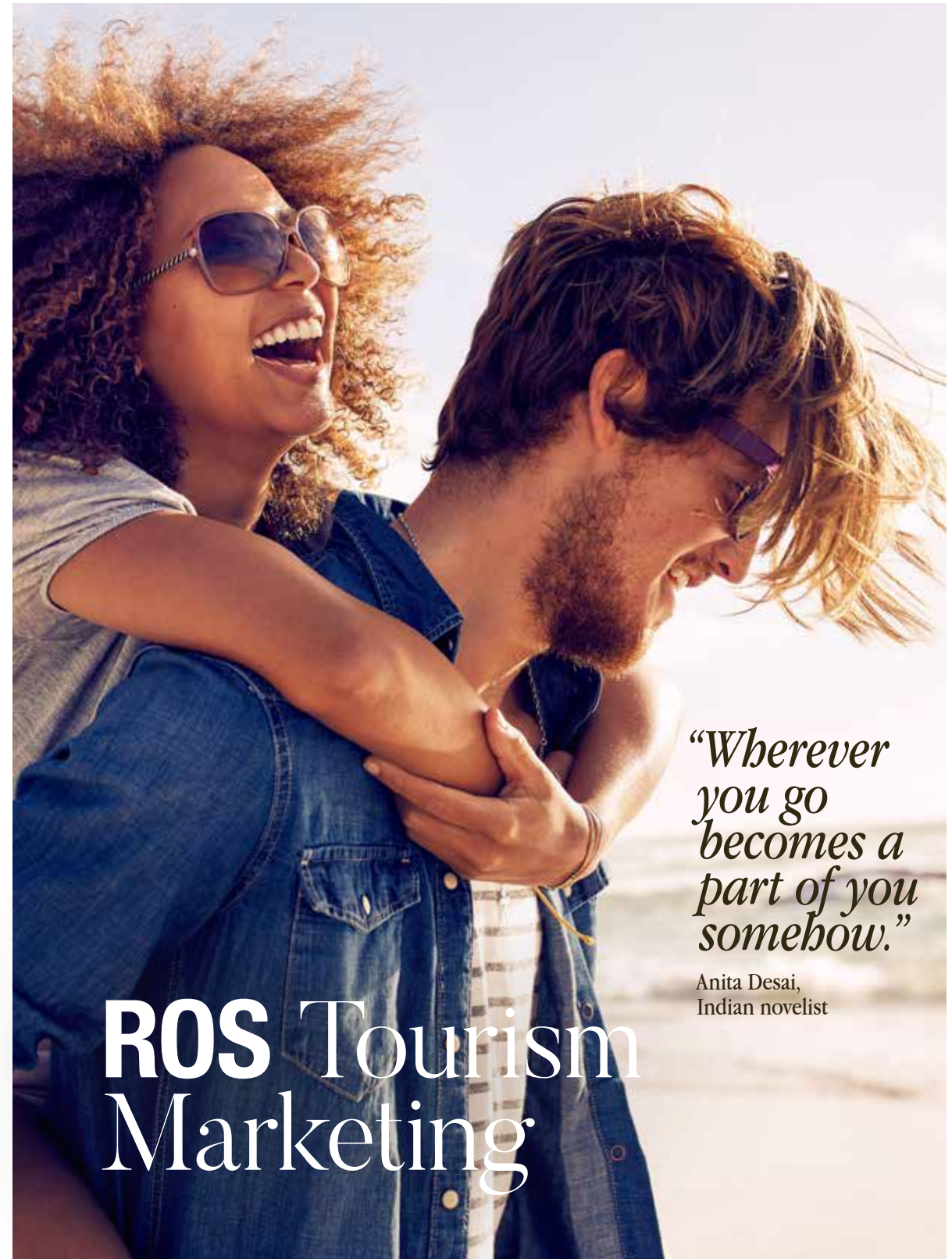
EUROPE'S TOURISM REBOUND CONTINUES INTO 2023, DRIVEN BY STRONG TRAVEL ENTHUSIASM. EUROPE'S TOURISM RECOVERY IS MAINTAINING ITS MOMENTUM DESPITE ECONOMIC HEADWINDS, REACHING ABOUT 95% OF 2019 LEVELS OF INTERNATIONAL TOURIST ARRIVALS.

Despite rising living costs due to inflation and ongoing instability, travel within Europe remains strong. According to the latest research on "Monitoring Sentiment for Domestic and Intra European Travel Wave 16" by the European Travel Commission (ETC), 69% of Europeans are still planning trips this year. However, financial concerns are weighing on travel decisions with Europeans adapting their plans to ensure their trips remain affordable. The report highlights a growing trend



towards off peak travel as well as budget friendly travel choices and experiences.

ROS is experiencing an upswing in tourism with an increase in visitors from the tertiary catchment area and a comeback of tax-free shopping tourists across its portfolio. As a result, ROS is adapting to changing tourism behaviour and positioning all centres as perfect day, weekend and cross-border destinations, working with hotels, coach operators, tourism ambassadors, leisure facilities and other travel services such as Global Blue.



“Wherever you go becomes a part of you somehow.”

Anita Desai,
Indian novelist

ROS Tourism Marketing



Save
the planet

ROS
ESG

“The earth does not belong to us, we belong to the earth.”

Chief Noah Seattle

Towards a sustainable shopping experience

CLIMATE CHANGE IS HERE AND IT AFFECTS US ALL. WITH #BETTERSHOPPING, ROS IS COMMITTED TO REDUCE CARBON FOOTPRINT

As ESG – Environmental, Social and Governance – becomes the new buzzword in retail real estate, it is today a must for Designer Outlets to commit to a better

planet as well as to specific targets in terms of energy efficiency, water consumption, waste management and green mobility.

With the #bettershopping campaign launched across its European portfolio, ROS aims to raise awareness and take responsibility for the ecological impact of the retail industry. In this regard, ROS Designer Outlets not only inform about their brands’ sustainable collections and the “green” services available at the centres, such as e-charging stations, but also ensure transparency with detailed information on the photovoltaic systems used, whether or not they are BREEAM certified



centres as well as other related measures to guarantee resource efficiency and reduce their carbon footprint. In addition, circular fashion is promoted by having placed “drop box” containers at ROS locations to give used clothes a second life.



Giving back to the community

SOCIAL RESPONSIBILITY FOR A BETTER PLANET AND ITS PEOPLE

The “S” in ESG stands for Social. This further key element of the ESG policy highlights the necessity to serve and give back to the communities with gestures that indeed matter. ROS centres contribute to meaningful social causes through various initiatives and promotions.

The Pink October campaign launched in several locations helps spread awareness and prevention of breast cancer throughout the

month of October, including raising donations for national and local organisations as well as hosting special events and offering free mammograms on-site.

Besides being the organiser of the ‘Shopping for Charity’ campaign on several occasions, Designer Outlet Soltau sponsors several local sport clubs like the MTV Soltau football club, International Heide handball cup and the Basketball Team Ebstorf Heide Knights.



La Torre Outlet Zaragoza supports several local organisations for children in hospitals and families in poverty. Many locations in the ROS portfolio have also hosted tree planting initiatives as well as eco-friendly events with workshops on sustainability, healthy eating, beehive building, soap making and much more. All initiatives have been well received by customers, who are showing increasing interest in such topics.



“It is not only for what we do that we are held responsible, but also for what we do not do.”

Molière, French playwright, actor and poet

A transparent Corporate Governance

SMARTER BUSINESS FOR A STRONGER WORLD

The “G” in ESG refers to the governance factors of decision making and how an organisation is managed and controlled. In the real estate and operator industry, governance involves issues like policies, management diversity and practices to prevent corruption, and the payment of taxes and political donations. It also includes

a company’s values, ethics, and commitment to “doing the right thing.” With governments and shareholders demanding greater transparency and reporting on these issues, real estate operators must ensure that their governance practices go beyond minimum compliance with relevant regulations.



ROS believes in transparency, accountability, and is committed to set high standards for employees, brand partners and investors in consideration of the law of the countries where ROS is operating. Only a respectful and fair treatment of employees ensures strengthened partnerships, long-term relationships and the preservation of trust in the company.



“The time is always right to do what is right.”

Nelson Mandela, South African anti-apartheid activist and politician



portfolio



ROS Managed Locations

- OPERATING OUTLETS
- NEW DEVELOPMENT
- REFERENCES

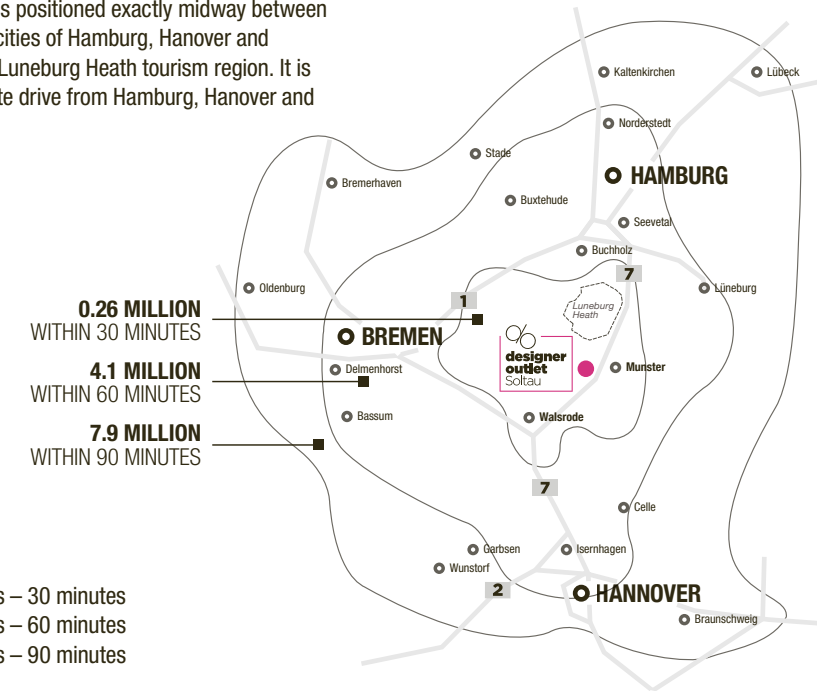
DESIGNER OUTLET SOLTAU



The Premium Outlet Village for Hamburg, Hanover and Bremen

LOCATION

Designer Outlet Soltau is positioned exactly midway between the three metropolitan cities of Hamburg, Hanover and Bremen, directly in the Luneburg Heath tourism region. It is located only a 40-minute drive from Hamburg, Hanover and Bremen.



CATCHMENT

0.26 million inhabitants – 30 minutes
4.1 million inhabitants – 60 minutes
7.9 million inhabitants – 90 minutes

ACCESS

Conveniently located right by the Soltau-Ost exit on the A7 motorway. The A7 is Germany's most important north-south traffic axis and Europe's longest national motorway. With more than 24 million vehicles a year, the A7 is one of the busiest motorways in Germany.

TOURISM

With more than 6.3 million overnight stays and 39 million day visitors every year, the Luneburg Heath is one of the best-known German local leisure parks and leisure regions. Luneburg Heath is Europe's number one leisure region: no other region has as many recreational parks. The renowned "Heide Park Soltau", which attracts 1.5 million visitors per year, is only a 10-minute drive away.

ARCHITECTURE Village
GLA 13,500 sqm
SHOPS approx. 62
PARKING approx. 1,200

ANCHOR STORES

Nike | Puma | Gant | Tommy Hilfiger | Marc O'Pollo | Joop! | Strellson | Guess | Levi's | s.Oliver | Only | Liebeskind | Lindt



Hamburg, Germany

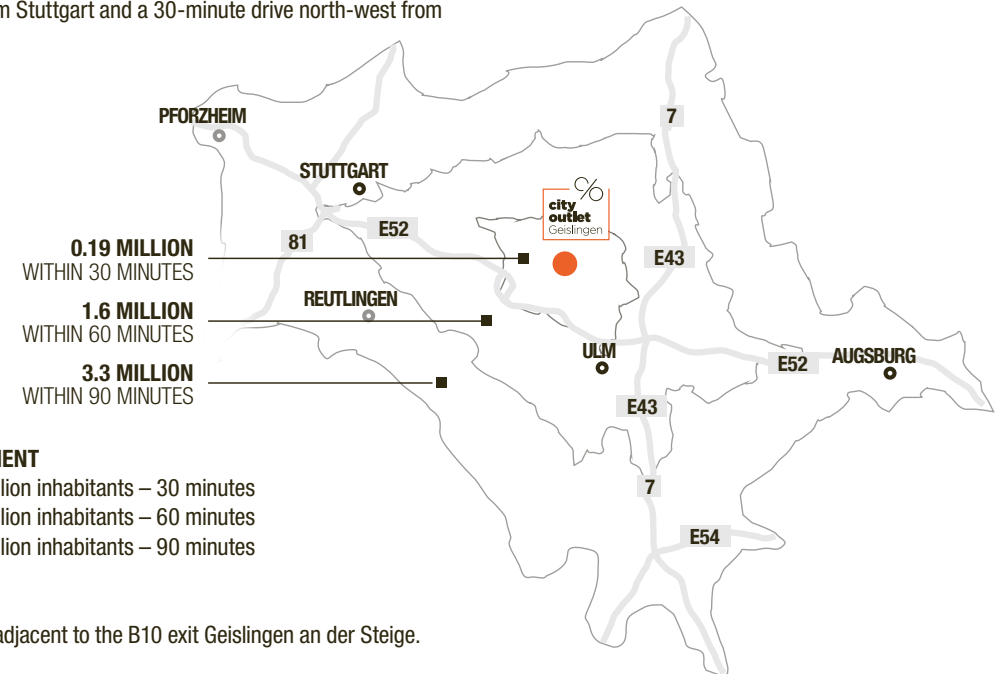
CITY OUTLET GEISLINGEN



The Home, Fashion & Lifestyle Outlet for Stuttgart, Göppingen and Ulm

LOCATION

City Outlet Geislingen in the district of Göppingen, belongs to the federal state of Baden-Württemberg. Just a 50-minute drive from Stuttgart and a 30-minute drive north-west from Ulm.



CATCHMENT

0.19 million inhabitants – 30 minutes
1.6 million inhabitants – 60 minutes
3.3 million inhabitants – 90 minutes

ACCESS

Directly adjacent to the B10 exit Geislingen an der Steige.

TOURISM

9.3 million overnight stays (+1.9%) in the Stuttgart metropolitan region. 4.1 million overnight stays (+4.3%) with 2.2 million tourists in the state capital Stuttgart.

ARCHITECTURE

Village
GLA approx. 5,700 sqm
SHOPS approx. 25
PARKING approx. 280

CENTRE EXTENSION

650 sqm | 4 shops
Opening 2024

ANCHOR STORES

WMF | Betty Barclay | Street One | Only | Triumph | Ravensburger | Gardena | Kneipp | Lindt



Stuttgart, Germany

PREMIER OUTLET BUDAPEST

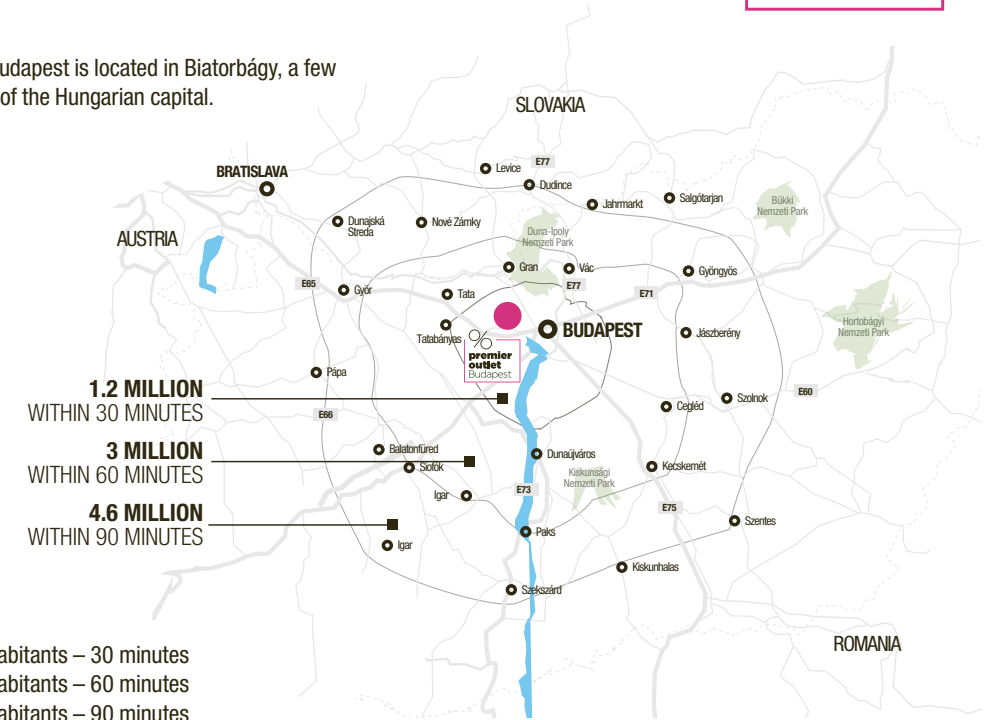


The Premium Outlet for the Hungarian capital



LOCATION

Premier Outlet Budapest is located in Biatorbágy, a few kilometers west of the Hungarian capital.



CATCHMENT

- 1.2 million inhabitants – 30 minutes
- 3 million inhabitants – 60 minutes
- 4.6 million inhabitants – 90 minutes

ACCESS

Just a 20-minute drive from Budapest at the interjunction of M1/M7 and M0 motorways. Premier Outlet is easily accessible by car and public transport.

TOURISM

The number of tourists has been increasing year on year, reaching a record 4.5 million visitors in 2019 (pre-Covid-19 data). The uniqueness of the capital lies in its vibrant cultural and social life, famous thermal baths and impressive historic buildings.

ARCHITECTURE	Village
GLA	23,000 sqm
SHOPS	approx. 100
PARKING	approx. 1,600

ANCHOR STORES

Nike | Adidas | Puma | Tommy Hilfiger | Boss | Karl Lagerfeld | Liu Jo | Lacoste | Gant | Guess | Desigual | Geox | Levi's | Intimissimi | Estée Lauder | Samsonite



Budapest, Hungary

M3 OUTLET POLGÁR

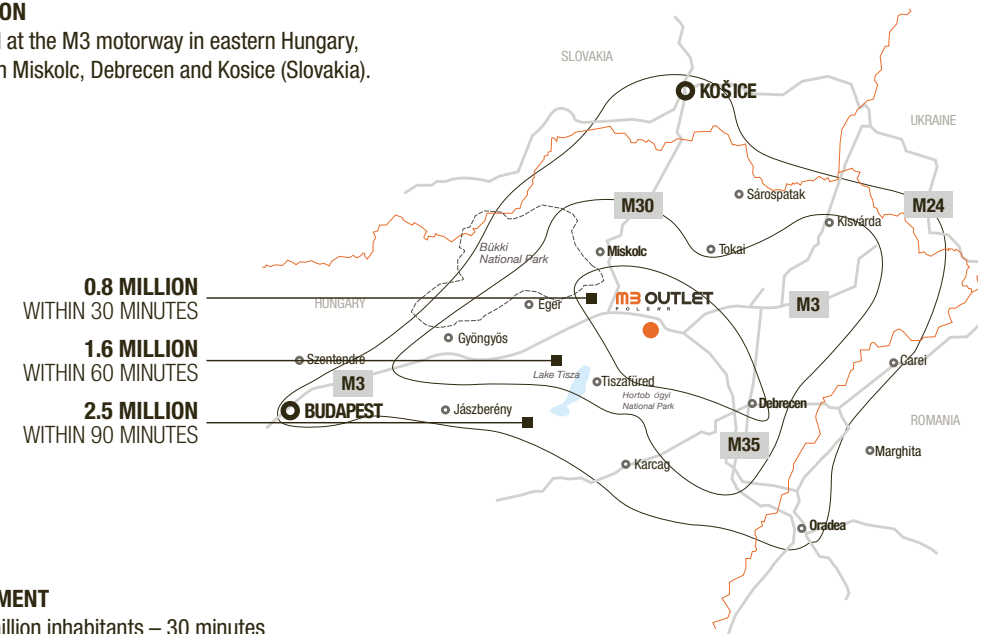


M3 OUTLET
POLGÁR

The Fashion & Lifestyle Outlet for eastern Hungary

LOCATION

Located at the M3 motorway in eastern Hungary, between Miskolc, Debrecen and Kosice (Slovakia).



CATCHMENT

0.8 million inhabitants – 30 minutes
1.6 million inhabitants – 60 minutes
2.5 million inhabitants – 90 minutes

ACCESS

A 30 to 40-minute drive from Debrecen, Nyíregyháza and Miskolc, 50 minutes from Eger and a 90-minute drive from Budapest.

TOURISM

The number of tourists has increased every year, hitting a record high of 2.2 million visitors.

ARCHITECTURE	Village
GLA	10,800 sqm
SHOPS	47
PARKING	approx. 850

ANCHOR STORES

Nike | Adidas | Puma | Under Armour | Gant | Guess | Helly Hansen | Levi's | Superdry | Mustang | Crocs



Debrecen, Hungary

DESIGNER OUTLET WARSZAWA

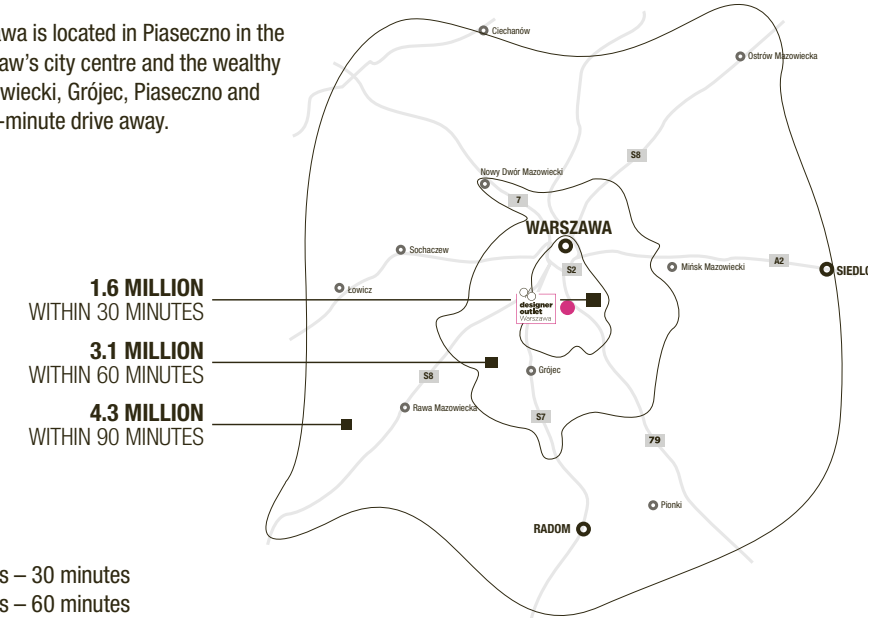


The Premium Outlet Centre for the largest city and capital of Poland



LOCATION

Designer Outlet Warszawa is located in Piaseczno in the south of Warsaw. Warsaw's city centre and the wealthy districts Grodzisk Mazowiecki, Grójec, Piaseczno and Pruszków are just a 30-minute drive away.



CATCHMENT

- 1.6 million inhabitants – 30 minutes
- 3.1 million inhabitants – 60 minutes
- 4.3 million inhabitants – 90 minutes

ACCESS

At the junction of Puławska and Energetyczna, which is directly connected to the South Express Ring Road S2 of Warsaw. Warsaw Chopin airport is only 15 minutes away.

TOURISM

Warsaw is becoming an increasingly attractive destination for leisure and business travel. 9.7 million tourists visited Warsaw, including 2.7 million foreigners. Taking one-day visits into account, the number of people who visited the city exceeded 24 million.

ARCHITECTURE	Mall
GLA	23,000 sqm
SHOPS	130
PARKING	approx. 1,400

ANCHOR STORES

Adidas | Puma | Nike | Polo Ralph Lauren | Armani | Boss | Calvin Klein | Furla | Guess | Lacoste | Marc O'Polo | Max Mara | Michael Kors | Pinko | Trussardi | Tommy Hilfiger



Warsaw, Poland

DESIGNER OUTLET GDANSK



The Fashion & Lifestyle Outlet Centre for the beautiful north of Poland

LOCATION

Designer Outlet Gdańsk is located in the city of Gdańsk, in the Trójmiasto Metropolitan Area; within Morski Park Handlowy; right next to Tri-City Ring Road and the S6 expressway with excellent access to the A1 motorway. Only a 15-minute drive from the Main Railway Station of Gdańsk.

0.76 MILLION
WITHIN 30 MINUTES

1.5 MILLION
WITHIN 60 MINUTES

2.2 MILLION
WITHIN 90 MINUTES

CATCHMENT

0.76 million inhabitants – 30 minutes
1.5 million inhabitants – 60 minutes
2.2 million inhabitants – 90 minutes

ACCESS

Situated at ul. Przywidzka 8 (Gdańsk Szadółki), at the S6 (E28) Ring Road of Trójmiasto, 12 km from the Lech Walesa Airport in Rębiechów.

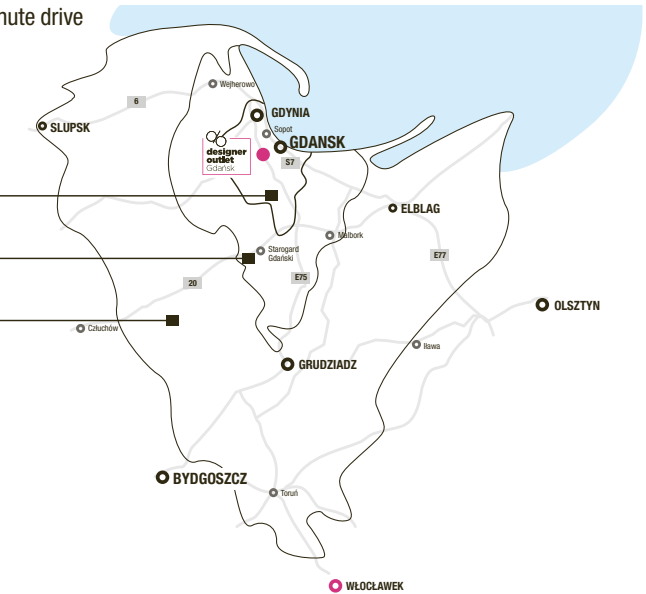
TOURISM

More than 9 million tourists annually.

ARCHITECTURE	Mall
GLA	17,400 sqm
SHOPS	100
PARKING	approx. 1,000

CENTRE EXTENSION

2,000 sqm | approx. 10 shops
Opening Autumn 2024



ANCHOR STORES

Nike | Adidas | Puma | Tommy Hilfiger | Calvin Klein | Karl Lagerfeld | Boss | Guess | Pinko | Pepe Jeans | Levi's | Marc O'Polo | Estée Lauder



Gdańsk, Poland

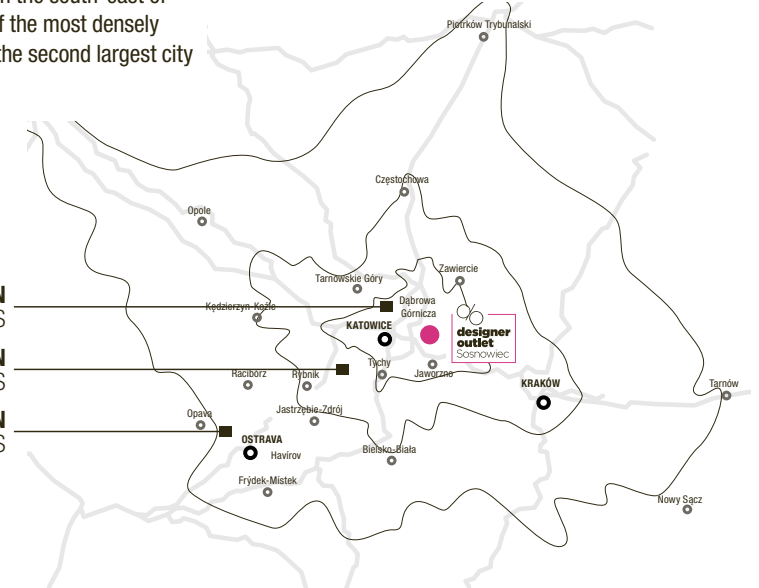
DESIGNER OUTLET SOSNOWIEC



The Fashion & Lifestyle Outlet Centre for the south of Poland

LOCATION

Designer Outlet Sosnowiec is located in the south-east of Katowice in Silesia Voivodship – one of the most densely populated regions in Poland. Krakow, the second largest city of Poland is 30 minutes away.



1.9 MILLION
WITHIN 30 MINUTES

5.0 MILLION
WITHIN 60 MINUTES

7.0 MILLION
WITHIN 90 MINUTES

CATCHMENT

- 1.9 million inhabitants – 30 minutes
- 5.0 million inhabitants – 60 minutes
- 7.0 million inhabitants – 90 minutes

ACCESS

At the junction of national road No. 79 connecting Krakow with Katowice and the S1 East Ring Road leading from Warsaw to Bielsko-Biala. Only 4 km from the A4 national East-West highway.

TOURISM

With more than 5.5 million tourists, the constant upward trend of the Silesian region as a popular tourism region continues.

ARCHITECTURE	Mall
GLA	16,800 sqm
SHOPS	100
PARKING	approx. 1,800

ANCHOR STORES

Nike | Adidas | Puma | Asics | 4F | Boss | Calvin Klein | Tommy Hilfiger | Marc O'Polo | Guess | Ecco | Levi's | Mammut | Salomon | Timberland | Estée Lauder



Katowice, Poland

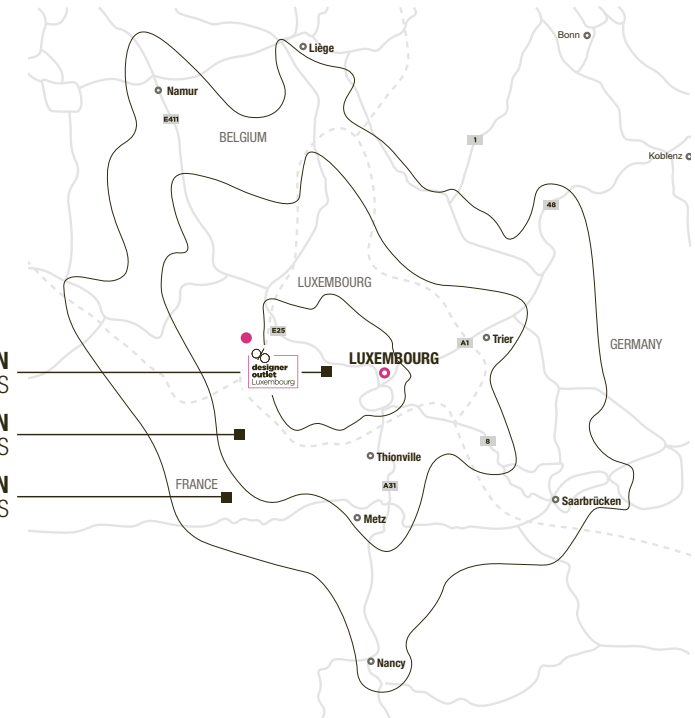
DESIGNER OUTLET LUXEMBOURG



The Premium Outlet Village at the crossroads of Belgium, France, Luxembourg and Germany

LOCATION

Designer Outlet Luxembourg is the Premium Outlet Village in Messancy, Belgium, at the crossroads of Luxembourg, France and close to Germany.



0.6 MILLION
WITHIN 30 MINUTES

1.9 MILLION
WITHIN 60 MINUTES

4.7 MILLION
WITHIN 90 MINUTES

CATCHMENT

0.6 million inhabitants – 30 minutes
1.9 million inhabitants – 60 minutes
4.7 million inhabitants – 90 minutes

ACCESS

Adjacent to the national road N81 leading to the north of France and a few kilometres from the E411 connecting to Luxembourg. Easily accessible by different bus and train lines within 15 minutes. Distance to Luxembourg airport is about 30 minutes drivetime.

TOURISM

The catchment area has a tourism potential of almost 8 million visitors including 3 million visitor arrivals per year in Wallonia, Luxembourg with 500k arrivals and a share of Alsace-Moselle tourism with 10m arrivals per year.

ARCHITECTURE	Village
GLA	16,500 sqm
SHOPS	approx. 64
PARKING	approx. 1,000

ANCHOR STORES

Adidas | Nike | Puma | Boss | Tommy Hilfiger | Calvin Klein | Gant | The Kooples | Zadig & Voltaire | Suitsupply | Guess | Levi's | Replay | L'Oréal



Luxembourg

DESIGNER OUTLET CROATIA



The Premium Outlet Village for Southeastern Europe

LOCATION

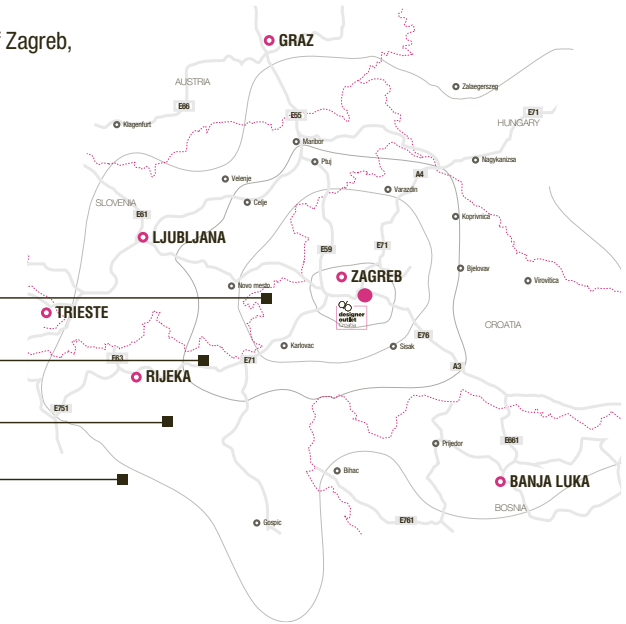
Designer Outlet Croatia is located in the south-east of Zagreb, Rugvica, next to the IKEA Hrvatska store.

980.000
WITHIN 30 MINUTES

1.7 MILLION
WITHIN 60 MINUTES

3 MILLION
WITHIN 90 MINUTES

5.1 MILLION
WITHIN 120 MINUTES



CATCHMENT

0.98 million inhabitants – 30 minutes
1.7 million inhabitants – 60 minutes
3 million inhabitants – 90 minutes
5.1 million inhabitants – 120 minutes

ACCESS

Adjacent to the A3/E71, junction Ivanja Reka A4/E71, which has an average daily traffic of 50,000 vehicles. The A3 highway connects Serbia and eastern Croatia with Zagreb. The A4 motorway runs north to the affluent town of Varazdin and further along to Hungary.

TOURISM

The capital city of Zagreb is finally revealing its true potential. As the official tourism figures show, Zagreb is rapidly moving from being a transit city to a tourist hub.

ARCHITECTURE Village
GLA 15,500 sqm
SHOPS approx. 70
PARKING approx. 4,000

CENTRE EXTENSION

approx. 5,500 sqm | 30 shops | 400 parking spaces
Opening 2025

ANCHOR STORES

Adidas | Under Armour | Puma | Boss | Tommy Hilfiger | Ted Baker | Patrizia Pepe | Lacoste | Guess | Calvin Klein | Calzedonia | Douglas



Zagreb, Croatia

LA TORRE OUTLET ZARAGOZA

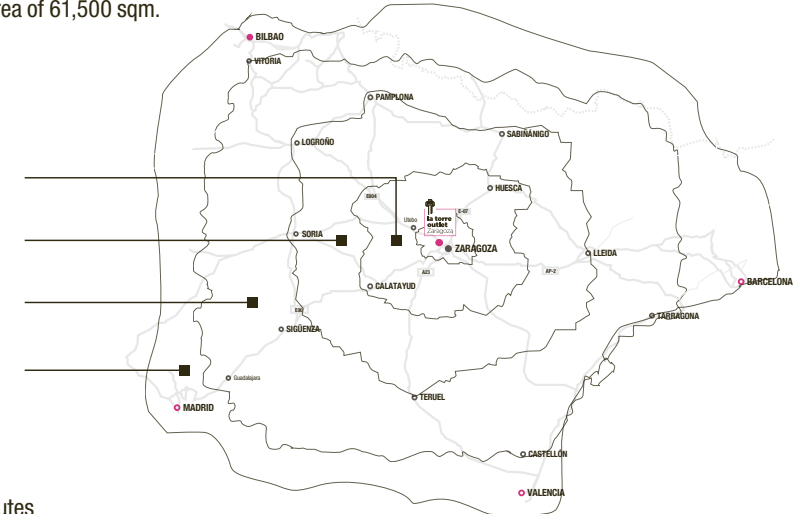


The Fashion and Lifestyle Outlet for the north of Spain

LOCATION

La Torre Outlet Zaragoza is the fashion and lifestyle shopping destination, combining convenience shopping at a Bauhaus DIY store, a food court including a cinema with a modern outlet village on a gross lettable area of 61,500 sqm.

- 0.9 MILLION**
WITHIN 30 MINUTES
- 1.4 MILLION**
WITHIN 60 MINUTES
- 1.9 MILLION**
WITHIN 90 MINUTES
- 2.8 MILLION**
WITHIN 120 MINUTES



CATCHMENT

- 0.9 million inhabitants – 30 minutes
- 1.4 million inhabitants – 60 minutes
- 1.9 million inhabitants – 90 minutes
- 2.8 million inhabitants – 120 minutes

ACCESS

Conveniently located in the north of Zaragoza adjacent to the AP-68 highway to Bilbao and directly linked to the A-2, one of the most important highway connections, which connects Zaragoza with Madrid and Barcelona. Furthermore, the location benefits from perfect access by public transport and is only 5 minutes away from the AVE Renfe high-speed railway to Madrid and Barcelona. Zaragoza airport is only 10 minutes drive time away.

TOURISM

1.2 million tourists per year with positive trend in shopping and Chinese tourism.

ARCHITECTURE	Village
GLA	13,500 sqm
SHOPS	90
PARKING	approx. 2,800

ANCHOR STORES

Adidas | Puma | Guess | Jack & Jones | Mango | Clarks | Skechers | All We Wear (Tommy Hilfiger, Pepe Jeans, Façonnable, Hackett) | El Corte Inglés Outlet | Primor



Zaragoza, Spain

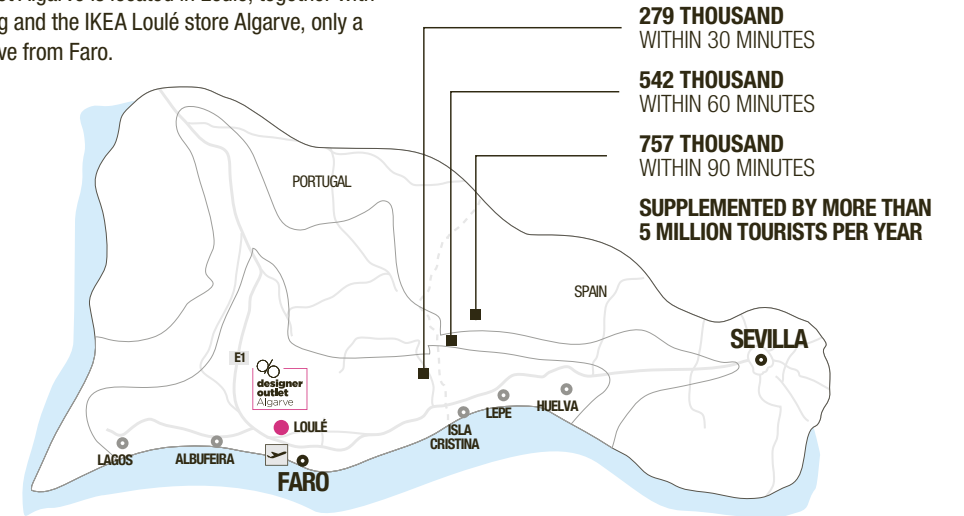
DESIGNER OUTLET ALGARVE



The Premium Outlet Village for the south of Portugal and Spain

LOCATION

Designer Outlet Algarve is located in Loulé, together with MAR Shopping and the IKEA Loulé store Algarve, only a 15-minute drive from Faro.



CATCHMENT

279 thousand inhabitants – 30 minutes
542 thousand inhabitants – 60 minutes
757 thousand inhabitants – 90 minutes
+ more than 5 million tourists per year

ACCESS

The National Road EN125 and the A22 motorway leading past a few kilometers south of Loulé. The nearest station of the lane 'Linha do Algarve' is located in Quatro Estradas between Almancil and Loulé. The connection to public transport by bus lines of VAMUS Transportes is even better. Distance to Faro Airport is only a 15-minute drive.

TOURISM

The Algarve has an annual tourism potential of 5 million tourists. In 2022, the Algarve was awarded "Europe's Leading Beach Destination" and "Best European Tourism Destination 2022".

ARCHITECTURE Village
GLA 13,000 sqm
SHOPS approx. 65
PARKING approx. 3,500

CENTRE EXTENSION

approx. 4,000 sqm | 25 shops | Opening 2025

ANCHOR STORES

Adidas | Puma | Asics | Boss | Adolfo Dominguez | Tommy Hilfinger | Lacoste | Façonnable | Calvin Klein | Bimba y Lola | Guess | American Vintage | Levi's | Douglas



Cavoeiro, Portugal

DESIGNER OUTLET KRAKÓW

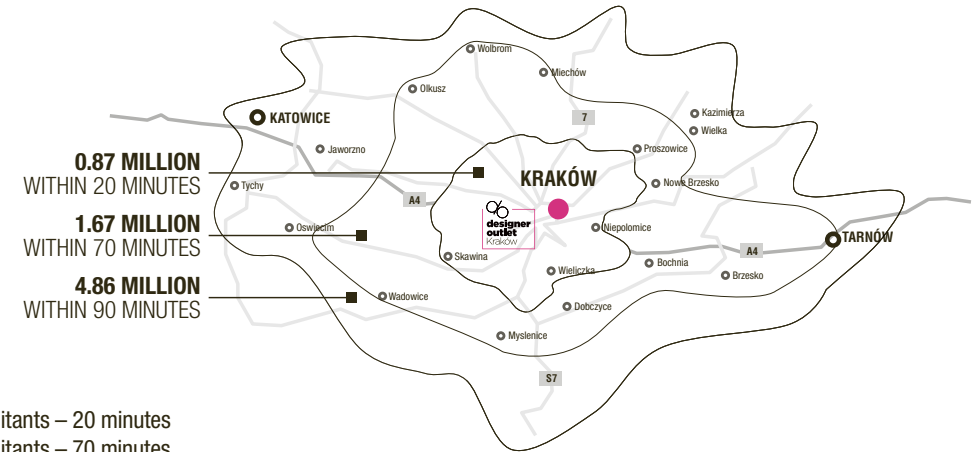


The new fashion & lifestyle outlet shopping destination for the Małopolska region

NEW DEVELOPMENT

LOCATION

Designer Outlet Kraków will be located on Nowohucka Street, one of Krakow's main traffic routes with well-established trade tradition. Designer Outlet Kraków is part of a new shopping complex with 2 retail parks on a gross lettable area of 60,000 sqm.



CATCHMENT

0.87 million inhabitants – 20 minutes
1.67 million inhabitants – 70 minutes
4.86 million inhabitants – 90 minutes

ACCESS

Conveniently located on one of Krakow's main routes and very well connected to A4 motorway and A7 expressway.

TOURISM

More than 14 million tourists annually.

ARCHITECTURE	Mall
GLA	20,000 sqm
SHOPS	100
CAFES AND RESTAURANTS	6
PARKING	approx. 2,000
OPENING	Spring 2025



Kraków, Poland



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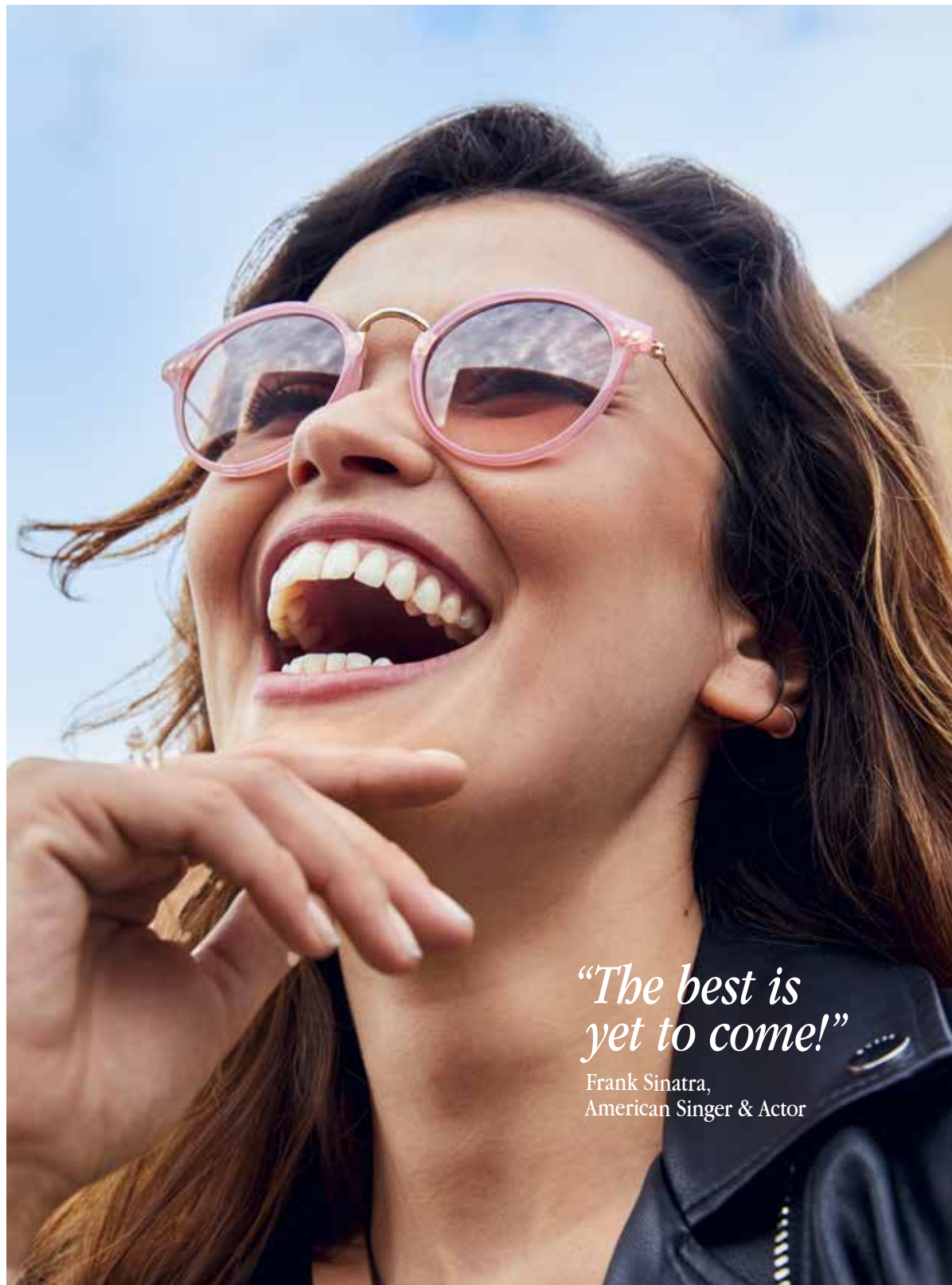
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*“The best is
yet to come!”*

Frank Sinatra,
American Singer & Actor

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