

Shopping Centre **News**

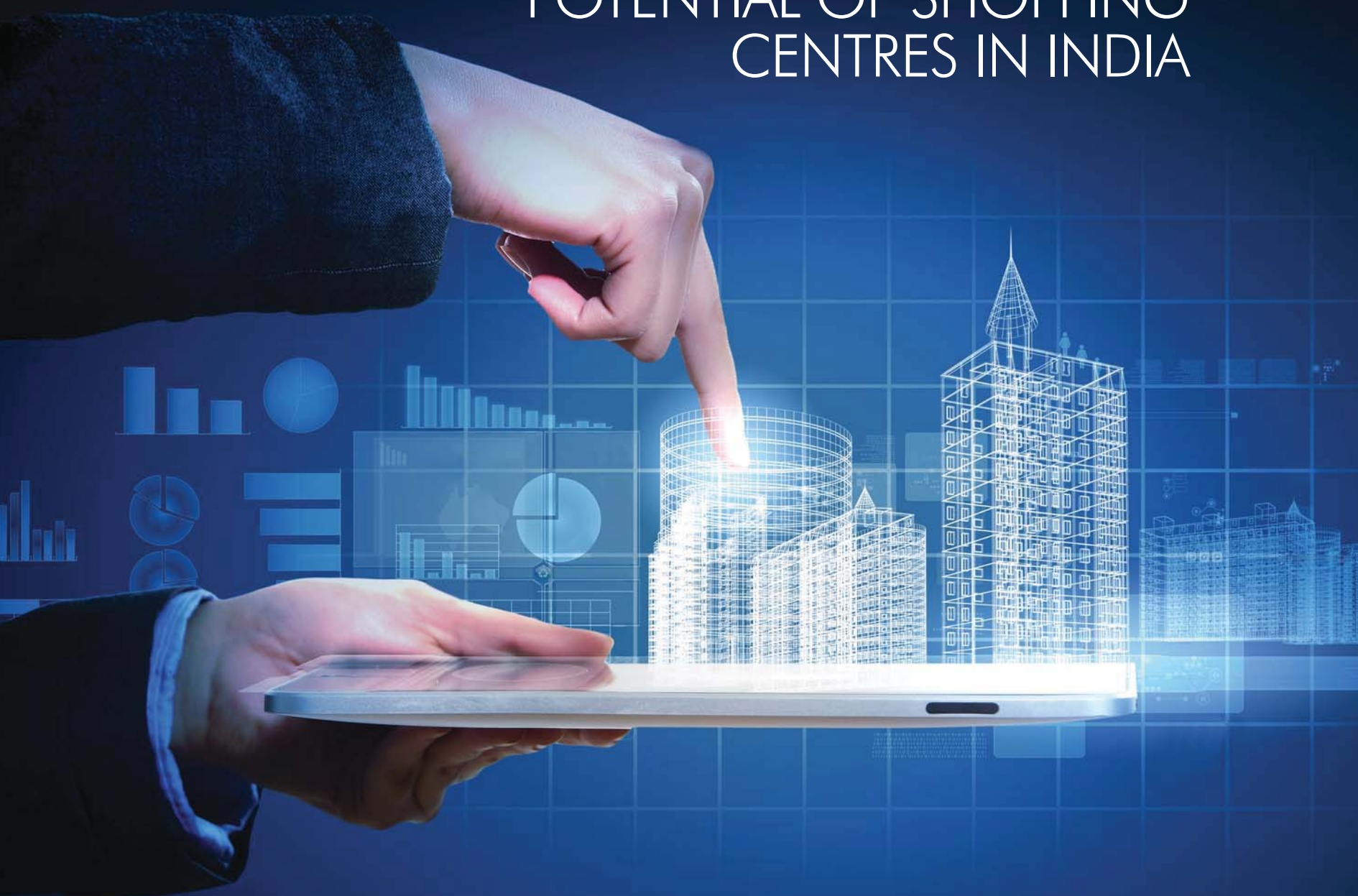
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DEVELOPING RETAIL IN INDIA

VOL. 8 NO. 2 ₹100

RETAIL REALTY

EVOLUTION AND
POTENTIAL OF SHOPPING
CENTRES IN INDIA



- Malls take the social media route
- Malls reinvent to remain steady in the e-commerce era
- Design elements for a successful mall
- Festive fiesta! malls jingled their way in 2015

EDITOR'S NOTE

editor-in-chief.....**amitabh taneja**
editorial director**r s roy**
publisher.....**s p taneja**
chief operating officer**bhavesh h pitroda**

editorial
head, knowledge & editorial alliances**rajan varma**
issue editor in charge**shubhra saini (asst. editor)**
correspondents**roshna chandran**
shipra srivastava
conference content**nakul jain**
mohua roy
contributing editor**zainab s. kazi**

creatives
art director**pawan kumar verma**
layout designer**divakar sharma**
sr. photographer.....**vipin kardam**

production
general manager**manish kadam**
sr. executive**ramesh gupta**

support
general manager – administration**rajeev mehndru**

subscription
asst. manager – subscriptions**kiran rawat**

ADVERTISING

BUSINESS HEAD

Anjali Sondhi, director
anjalisondhi@imagesgroup.in,
Mob.: +91 9810204297

Waseem Ahmad, vice president
waseemahmad@imagesgroup.in,
Mob.: +91 9833628852

DELHI: **vineet chadha**, assoc. vice president (retail support group & indiaretailing)
sachin khanna, manager

MUMBAI: **bindu pillai**, sr. general manager

AHMEDABAD: **pankaj vyas**, manager

KOLKATA: **piyali obero**, assoc. vice president & branch head
rohan narayan, asst. manager

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smriti bhagat, manager

LUDHIANA: **hemant gupta**, associate

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PRIVILEGE MEMBERSHIP/CONSUMER CONNECT

Anil Nagar, assoc. vp
anilnagar@imagesgroup.in
Mob.: +91 9811333099

Hemant Wadhawan, general manager
hemantwadhawan@imagesgroup.in
Mob.: +91 9810424668

membership team: **misba naushad** **sarika gautam**
priti kapil **rajiv kumar palta**

Images Multimedia Pvt. Ltd. (CIN: - U22122DL2003PTC120097)

REGISTERED OFFICE: S 21, Okhla Industrial Area, Phase II, New Delhi 110020
Ph: +91-11-40525000, Fax: +91-11-40525001, Email: info@imagesgroup.in,
Website: www.imagesgroup.in

MUMBAI: 1st Floor, Panchal Iron Works, Plot No. 111 / 3,
Marol Co-Operative Industrial Estate, Marol, Andheri (East). Mumbai - 400059.
Ph: +91-22-28508070 / 71, Fax: +91-22-28508072

BENGALURU: 523, 7th Cross, 10th Main, (Jeevanbhima Nagar Main Road),
HAL 3rd Stage, Bengaluru 560 075 Ph: +91-80-41255172/41750595/96, Fax: +91-80-41255182

KOLKATA: 30-B, Anil Roy Road, Ground Floor, Kolkata 700 029
Ph: + 91-33-40080480, Fax: +91-33-40080440

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The retail real estate sector witnessed a slow year in 2014 with limited retail space getting added to the total supply. But the year 2015 will largely be about recovery – bringing back lost confidence and positively impacting the business sentiments of retail realty. With the lowering down of the rentals and the increased foreign investments in India, it is expected that there will be a hike in investor activity in retail real estate spaces. Cut in interest rates, introduction of REITs, improved market sentiments and focused efforts by the government to reduce project loopholes and transactional bottlenecks will go a long way in clearing the way for positive trends this year.

If we talk about the mall scenario of today, then urban India is still witnessing a time where the supply of organised space is much more than the current demand and consequently, the vacancies are quite high. Today, the retail realty in India is facing a Catch-22 situation where although retailers are looking for spaces, there seem to be a dearth of quality mall spaces. These are some of the challenges that are bound to lay open zillion of opportunities, encouraging developers and promoters to look at solutions that ensure that these assets are much more sustainable as consumption markets. We at Shopping Centre News tried to delve deeper on the subject of the evolution and potential of malls in India.

In the cover story of this issue, we have tried and analysed the mega trends, challenges, scope and opportunities that will shape up the Indian shopping centre industry in the coming years.

Apart from this, we have a bunch of few other interesting articles. Stephen Roberts from Bentel Associates talked about the design elements for a successful mall. Anuj Puri of JLL shared his perspective on growing importance of e-commerce and its impact on retail real estate. The magazine ends with a Snapshot section, which outlines that how each mall took maximum mileage of the Festive season and how they jingled their way in 2015.

We hope that you will like this issue of SCN and we will try and churn out more interesting and innovative articles in the next issue.



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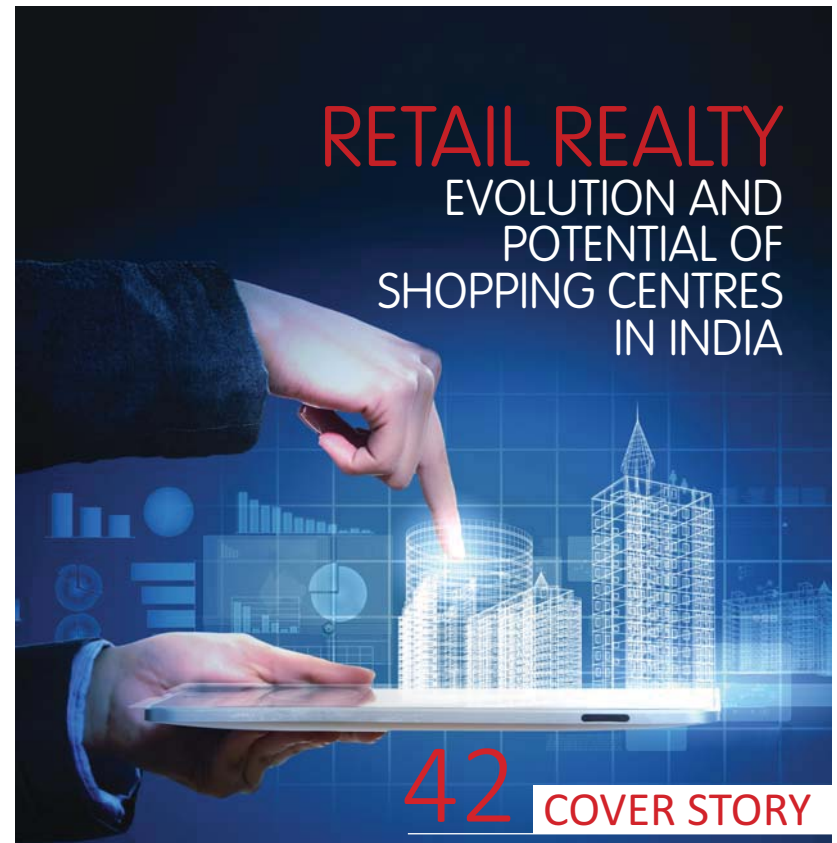
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Shopping malls in India have definitely come of the age – from being mere shopping arcades, offering products and services to providing wholesome shopping and leisure experiences to consumers. We at Shopping Centre News tried to delve deeper on the subject of the evolution and potential of malls in India.



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RETAIL REAL ESTATE EXPECTS TO SEE 13 MSF OF MALL SUPPLY

The retail real estate sector witnessed yet another slow year with limited retail space getting added to the total supply, reports Cushman & Wakefield, a global real estate consultancy. At the end of 2014, only 1.7 million square feet (msf) of fresh mall space was infused in the top eight cities of India. Leading cities of India saw an addition of only 5 new malls of which Pune noted the influx of 2 malls adding up to 500,000 square feet (sf) of mall space. Hyderabad (500,000 sf), Bengaluru (310,000 sf) and Delhi-NCR (250,000 sf) witnessed an infusion of 1 mall each. Kolkata saw an addition of 120,000 sf to the city mall inventory.

BY CUSHMAN & WAKEFIELD



The total supply that was estimated to enter the market in 2014 was approximately 12 msf of which less than 15 per cent came into existence amounting to indefinite deferment of approximately 25 malls across key cities of India. Maximum number of malls (9) were deferred in Delhi-NCR totalling to 6.7 msf of new mall space, which is 56 per cent of the total mall space deferred. Though Bengaluru, Pune and Kolkata witnessed some supply during this year, a large quantum has been deferred. Bengaluru lost out on 7 planned malls while 4 malls were deferred in Pune. Kolkata witnessed the deferment of 1 mall while Chennai and Hyderabad both witnessed the deferment of 2 malls each. The delays have happened due to a variety of reasons, mostly from approval construction linked delays in Pune, Hyderabad, Bengaluru, Kolkata and Delhi-NCR. However, low demand has also led to the deferment of some malls in Delhi-NCR, Bengaluru and Chennai.

However, leasing activities in the existing and new mall spaces remained stable with vacancy levels remaining similar to the previous year recording a very marginal drop in vacancy at 0.2 per cent. The average vacancy level stood at 14.3 per cent.

Sanjay Dutt, Executive Managing Director, South Asia, Cushman & Wakefield said: "There has been a period of low activities in the mall supply across the country as the developers are cautious of taking up retail projects which are high gestation and high investment as retailers still remain concerned on uptake and are therefore cautious with their expansion plans in India. Having said that, any new retail location that has appropriate catchment areas have witnessed good levels of activities."



Vacancy & Mall Supply 2014 and Forecast for 2015

City	Y-o-Y Vacancy Change	Supply 2013 (in million sf)	Supply 2014 (in million sf)	Supply 2015 (F) (in million sf)
Ahmedabad	1.8%	0.00	0.00	0.00
Bengaluru	0.9%	0.00	0.31	3.39
Chennai	0.2%	2.01	0.00	0.50
Hyderabad	-0.5%	0.43	0.50	6.06
Kolkata	-0.7%	0.50	0.12	1.23
Mumbai	0.1%	0.94	0.00	0.50
Delhi-NCR	1.3%	0.00	0.25	6.06
Pune	-3.5%	0.70	0.50	1.14
TOTAL	-0.2%	4.59	1.68	13.01

Source: Cushman & Wakefield Research

Deferment in Q4 2014 from Q4 2013

City	Number of Malls	Total Volume in (Square Feet)
Ahmedabad	0	0.00
Bengaluru	7	3.00
Chennai	2	1.00
Hyderabad	2	0.00
Kolkata	1	0.00
Mumbai	0	0.00
NCR	9	7.00
Pune	4	1.00
India	25	12.00

Source: Cushman & Wakefield Research

Pune witnessed robust leasing activity and the vacancy levels dropped by 3.5 percentage points despite new supply infusion. Hyderabad and Kolkata also witnessed the mall vacancy of the city dropping by 0.5-0.7 percentage point during 2014 owing to increased demand. Vacancy levels in Ahmedabad increased the most by 1.8 percentage points due to low preference for poor quality mall space, followed by Delhi-NCR, where the mall vacancy level rose by 1.3 percentage points due to exits in select malls in eastern and north-western part of the city. Mall vacancy level increased by 0.9 percentage point in Bengaluru due to retailers exiting poor quality mall space and malls with accessibility issues. Due to churn, Chennai and Mumbai witnessed marginal increase in mall vacancy level.

The estimated supply for 2015 is expected to be at 13 msf, all of which is expected to be a carry forward from the previous year. NCR which had seen the highest deferment in 2014, is expected to see the

THE AMBIGUITY AROUND THE GOVERNMENT'S STAND ON ALLOWING FDI MULTI BRAND RETAIL IN INDIA, IS ONE OF THE KEY REASONS FOR DEVELOPERS AND INVESTORS TO KEEP OFF CREATING LARGE RETAILS SPACES.

highest new supply of 6 msf followed by Bengaluru which is expected to see supply of approximately 3.39 msf in 2015. Pune and Kolkata are expecting new mall supply of a little over 1 msf while Chennai and Mumbai will see 500,000 sf of new malls by the end of 2015.

Sanjay further added: "The ambiguity around the Government's stand on allowing FDI multi brand retail in India, is one of the key reasons for developers and investors to keep off creating large retail spaces. The growth in online sale activity in recent past has only added to the challenges faced by off line retailers. Going forward, in 2015, retail development activities are expected to remain stable but shy of seeing any large scale standalone mall development. Exceptions will be there where land is zoned - retail or commercial or where mixed used development is able to allow cross subsidies retail development. The expected supply for 2015 for mall space is estimated to be 13 msf all of which are the deferment from previous year. However past trends indicate 60 per cent to 70 per cent of the total estimated supply only opens for occupancy."

CITY WISE – RETAIL MARKET ANALYSIS Ahmedabad

Limited availability of quality mall space kept the transaction activity in Ahmedabad low. Increasing vacancy levels in a few poor quality malls on S.G. Highway led to city's overall mall vacancy increasing

by 1.8 percentage points over the last one year and was noted at 32.1 per cent. Despite rising vacancies, landlords kept the rentals for these malls steady during the last year. Since higher preference for main-street format was noted in Ahmedabad, it did not witness any mall supply during 2014 and currently has just one under-construction mall.

Transaction activity in main-streets remained healthy during the last one year and some domestic brands such as Tisva and Satyug Gold opened their first stores in the city. Banks, apparels and lifestyle brands expanded footprint in prominent main-streets such as C.G. Road, Satellite Road and Prahladnagar. However, currently availability in prime main-streets such as C.G. Road, Satellite, Law Garden and Prahladnagar remains low. Rentals across all major main-streets remained stable over the last one year.

Bengaluru

Bengaluru has witnessed an addition of a new mall in the northern part of the city, increasing the total mall space by approximately 300,000 sf in the year 2014. Bengaluru witnessed deferment of 7 malls admeasuring 2.6 msf to 2015. This large scale deferment was due to low demand in some under-construction malls in northern and eastern Bengaluru and unanticipated project delays in other malls. Legal complications have halted the construction of one mall. The overall mall vacancy is currently noted at 9.3

MALLS TAKE THE SOCIAL MEDIA ROUTE

BY ZAINAB S KAZI



Everything is online these days. From booking a romantic dinner to movie tickets and of course shopping from pin to piano. No longer is a person excited with the glowing 50 per cent off sale messages and advertisements from the malls / shopping centres. What provides a respite then? The mantra for survival today is to integrate social media as part of the marketing tool to attract more footfalls to the mall. We dig in deep to hear it from the experts.

Setting the context for the story and highlighting the reach of online retail in India, Anuj Puri, chairman and country head – JLL India shares: “India’s retail market value was estimated at \$520 billion in 2013, and is expected to grow to \$950 billion by 2018. With a CAGR currently pegged at 13 per cent, the Indian e-commerce market is expected to grow the fastest within the Asia-Pacific Region – with its market size doubling every 2-2.5 years. This certainly gives us reason for deep introspection. While the global growth rate of online shoppers is estimated at 8-10 per cent, India currently has more than 10 million online shoppers.” Puri makes a valid point when he states that the internet has given Indian consumers access to a wide spectrum of products and services, even in places where brick-and-mortar shopping complexes have not reached. He adds: “Also, the availability of a much wider range of products

when compared to physical retail stores, coupled with relatively lower prices, is driving demand for online retail. With the evolution of the online marketplace, sites like Flipkart, Snapdeal, OLX and Jabong are thriving and more and more Indians are buying goods online.” Under such circumstances, it is time for malls and shopping centres to get active on the digital mode by making their presence felt, though in a right way.

The advent and the gradual popularity of social media has led to not just brands but also malls and shopping centres to have their own Facebook page, Twitter handle, being present on Instagram and the likes. The smallest of brand from the modern retail world today cannot afford to not be present on social media. It would be akin to a cardinal sin if the brand chooses to remain outside the new wave domain. What though is not clear is whether their mere presence is enough. Where for brands, may be their mere presence would do good in some way; for malls



Right from the time that consumers enter the parking lot of the mall to their reaching the mall lobby and the stores, shopping malls today have started providing enthralling conveniences and services to the consumers. They have upped the ante and have braved the challenges that posed a severe threat to their existence. Retail realty in India has gone through a period of great introspection and the malls that were able to realise the issues have taken remedial measures to emerge undaunted.

While some of the malls learnt it the hard way, there were others took cue from the mistakes made by their predecessors. However, if we talk about the mall scenario of today, then urban India is still witnessing a time where the supply of organised space is much more than the current demand and consequently, the vacancies are quite high. Today, the retail realty in India is facing a Catch-22 situation where although retailers are looking for spaces, there seem to be a dearth of quality mall spaces. These are some of the challenges that are bound to lay open zillions of opportunities, encouraging developers and promoters to look at solutions that ensure that these assets are much more sustainable as consumption markets.

CHANGING DYNAMICS OF MALL INDUSTRY

The retail real estate sector is a significant contributor to India's economic activity. The sector has gone through an unprecedented growth over the last decade, driven by robust economic growth, rapid urbanisation and changing lifestyles and aspirations of the Indian retail consumer. From less than 1 million sq.ft. of mall space in 2001, the Indian organised retail sector has increased manifold.

Also, due to the opening up of Foreign Direct Investment (FDI), India is emerging as the favourite retail destination for investors, who are making a beeline to enter this lucrative market. "The recent liberalisation of retail FDI norms, the outstanding success of some recent entrants, such as Zara and M&S, and the constant quest of overseas brands

to expand into high growth markets will continue to be some of the key growth drivers in the near future," says Prodipta Sen, Director, Alpha G:Corp Management Services.

According to Sen, even small towns and cities are witnessing a major shift in lifestyles, preferences and patterns, and have thus emerged as attractive markets for international retailers to expand their presence in a concerted manner. Preference for modern retail, rising population of working women, desire for better quality products and easy availability of international brands are all factors that are driving this growth. Thus, the retailer has become crucial to the realty investor when it comes to mall development.

EVOLUTION OF MALLS

Although mall culture is still evolving in India, due to changed consumer behaviour and shopping habits the malls have evolved tremendously, just as the term 'shopping' has evolved over the years from just buying to having an 'experience'. Speaking on the same, Shubhranshu Pani, Regional Director – Retail Services, JLL India says: "Shopping malls have evolved from merely offering products and services to providing wholesome and exceptional experiences to consumers. Right from the time that consumers enter the parking space in a mall to their arrival in the mall lobby and the stores, malls have started providing world-class conveniences and services."

Also, due to the increase in online shopping, it has become imperative for shopping mall developments to attract consumers by offering superlative experience and conveniences. Malls must now deliver a combination of offerings in terms of shopping, entertainment and leisure, as well as food and beverages (F&B) options.

As per Pani, the introduction of newer concepts and retail formats positively impacts footfalls in a



Images Awards for excellence in food retailing

Outstanding achievements of India's most progressive foodservice operators and food and grocery retailers for the calendar year 2014 were acknowledged at the 8th Annual Coca Cola Golden Spoon Awards (CCGSA, 2015) on January 15, 2015 at the India Food Forum, which was held from January 14th to 16th in Mumbai.

The glorious awards evening was kicked off with some uber energy by versatile crooner Shazneen blending different genres of music. The evening was hosted by Shaili Chopra, a formidable, high-profile journalist with nearly twelve years of experience in television anchoring, reporting and writing columns. Leading stand-up comedian Saurabh Pant left the audience in splits with his intelligent brand of comic relief.

Talking about the 8th Annual Coca Cola Golden Spoon Awards, Amitabh Taneja, Chief Convenor of India Food Forum said, "India's most prestigious accolades for food and food service retailers, were launched in the year 2008 to acknowledge the rising importance of modern food & grocery retail, and its crucial role in the evolution of effective marketing and distribution of food and grocery brands in the country."

SELECTION PROCESS AND JURY MEMBERS

The Coca Cola Golden Spoon Awards 2015 selection process involved inviting entries from the nation's leading foodservice and food & grocery retailers across multiple categories. The jury analysed key performance metrics such as growth in top line sales and retail presence, sales per square foot, same store sale growth, and also studied the impact of IT application, innovation, marketing, supplier relations and employee practices. The Coca Cola Golden Spoon Awards (CCGSA) jury, comprising distinguished personalities in the field of research and consulting with thorough insights into the business of foodservice/ food & grocery, went through the nominees' data and gave scores based on their understanding of the nominees.

The jury for Coca Cola Golden Spoon Awards 2014 included Jyoti Bhasin Country Manager, NFS, Seema Chandra, Food Editor, NDTV, Anuj Puri Chairman & Country Head, JLL India, Harish Bijoor, CEO, Harish Bijoor Consults Inc., Amit Lohani, Convenor, Forum of Indian Food Importers (FIFI) and Amitabh Taneja, Chief Convenor, India Food Forum.

IMAGES Excellence Awards were presented to retailers and concepts for exceptional initiative, outstanding/focussed performance, setting efficiency benchmarks, innovation, and broader impact on industry.

INNOVATIONS AT INDIA FOOD FORUM

For eight years, India Food Forum has been aiming to develop and nurture the food retail business in India through industry engagement, debates, knowledge workshops and recognition for best-in-class industry performances. The objective is to not just support in thought, but also enable businesses to get together and develop workable partnerships.

This year, another chapter was introduced to the India Food Forum, with the launch of India Food Retail Tech, which exhibited tools and ideas to optimise the omni-channel environment, while displaying solutions to boost efficiencies across the food value chain.

"Retailers now are all too aware of the benefits of engaging consumers through technology. They know that the explosion of e-commerce destinations and digital media has created an incredibly urgent need to monitor shopper behaviour in real time. Insights need to be drawn as events happen, and executed before the next lost sale or an out-of-stock situation happens," Taneja said.





“ MIXED USE DEVELOPMENTS BECOME THE MOST VISITED PLACES BY PEOPLE IN THE VICINITY AFTER THE INITIAL SETTLEMENT PERIOD ”

Bestech Square Mall is a 3.5 lakh sq.ft. retail project located in the heart of Mohali. It is part of Bestech's mixed use project comprising high-end residencies, an office tower and a five-star hotel (Park Inn by Radisson). Shashank Pathak, AVP – Retail Leasing, Bestech talks about the USP of this project, which is scheduled to open by mid 2015.

BY SHUBHRA SAINI

ABOUT BESTECH SQUARE MALL

The site offers excellent connectivity to the airport, railway station as well as the bus terminal among other landmarks. Its proximity to some of the renowned colleges and educational institutions such as ISB campus and NIPER Mohali makes it a perfect everyday centre for the people of Mohali and Chandigarh.

The total GLA of Bestech Square mall is 3.5 lakh sq.ft. The mall houses a 5-screen multiplex by Cinepolis, a 35,000 sq.ft. hyper market, a food court by Food Quest and ample space to accommodate an entertainment zone, fitness centre, microbrewery, fashion anchor and mini anchors, and over 85 shops across floors for the perfect mix of brands.

In the anchor category, the signed brands include Cinema by 'Cinepolis', with 5 screens and 1000+ seats; a food court by Food Quest, built across 15,000 sq.ft. and having seating space for 250+ people; and a fitness centre by Burn Gym, built on approximately 6,800 sq.ft. area. The hypermarket and fashion anchors are still being finalized by the company.

Under the vanilla category some of the signed brands include Archies, Numero Uno, Bata, Woodland, Nike, Chumbak and more.

Talking about the mall management, Pathak says: "Bestech's in-house leasing team is managing the leasing and brand mix of the mall. The team consists of seasoned retail and real estate professionals with ample experience in the industry."



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Following the stupendous success of Orion Mall at Brigade Gateway in Bangalore, the Brigade Group is now developing Orion Mall 2 in the established East Bangalore. This second mall development named 'Orion East' will be the only lifestyle mall in about a 7 km radius, and will serve as the destination of choice for a young population in the upmarket areas of Fraser Town, Benson Town, HRBR Layout and Kamanahalli. With Brigade Group and Orion Mall's impressive track record in design, development, marketing and operations management, Orion East is poised to make a mark yet again in Bangalore's retail landscape.

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