

TOULOUSE

Cushman & Wakefield

Global Cities Retail Guide

Known as “la ville rose” (pink city) because of its distinct buildings, Toulouse is located in South Western France and is the capital of the Occitanie region. France’s fourth largest conurbation, Toulouse boasts one of the fastest population growth rates in France and is one of the youngest cities in the country, with more than 46% of its population under 30 years old. It enjoys a long tradition of teaching excellence (110,000 students) and ranks second in France for the number of degree holders, therefore providing large high-tech industrial groups such as Airbus and Thalès with a highly-qualified workforce.

Toulouse city centre attracts many visitors, local residents and tourists alike, and benefits from a large pedestrian area as well as a great public transportation network for Greater Toulouse (metro, tramway, suburban railway, bus). Toulouse is home to a wide range of retailers and retail sectors, with prime retail areas mainly located on the city’s right bank close to Place du Capitole, the former Place Royale which hosts Toulouse city hall, the famous Théâtre du Capitole and many cafes and restaurants reflecting an “art de vivre”, partly inherited from Toulouse’s Spanish influence.

The suburban retail scene is also vibrant with several major shopping centres such as Blagnac (48,600 sqm with a Leclerc hypermarket), Grand Portet, (60,600 sqm shopping centre located in the South of the Greater Toulouse area), Labège 2 (Carrefour), Leclerc Saint Orens, Leclerc Rocques, or the recently extended La Galerie Espace Fenouillet totalling 48,000 sqm integrated in a huge retail zone of 80,000 sqm in the Northern area of the Greater Toulouse. Further retail developments are planned in the next 3 years, mainly situated in the South of Greater Toulouse like Les Allées Shopping, Portet extension, Labège 2 extension, Val Tolosa (2022, suspended for the moment), amongst others.



TOULOUSE OVERVIEW

TOULOUSE

KEY RETAIL STREETS & AREAS

RUE ALSACE-LORRAINE

Rue Alsace-Lorraine is Toulouse's premier retail thoroughfare. The street was renovated from 2011 to 2013 to create a fully pedestrian area, which has reportedly increased traffic. Linking Rue de Metz to Boulevard de Strasbourg, Rue Alsace-Lorraine is home to numerous internationally recognised low to mid-range retailers in a wide range of retail sectors. Rue Alsace-Lorraine hosts over 110 stores among which are a number of anchor stores including Monoprix, H&M or Zara and the brands of the Spanish group. The latter has further expanded, taking over the former Virgin store while Primark finally opened in 2018 on 7,200 sqm in the building formerly occupied by Galeries Lafayette Maison.

PLACE DU CAPITOLE

The square's name comes from the Capitole, a grand neoclassical palace which hosts the city hall of Toulouse. The square, which is entirely pedestrianised since 2013, offers many reasons to shop and visit: besides the Capitole and the Théâtre National du Capitole, the Place boasts the city's best-known cafés such as Le Bibent or Le Grand Café de l'Opéra as well as well-known international retailers including C&A, Sephora, Mango, and Nespresso.

RUE DE LA POMME/ RUE DES ARTS

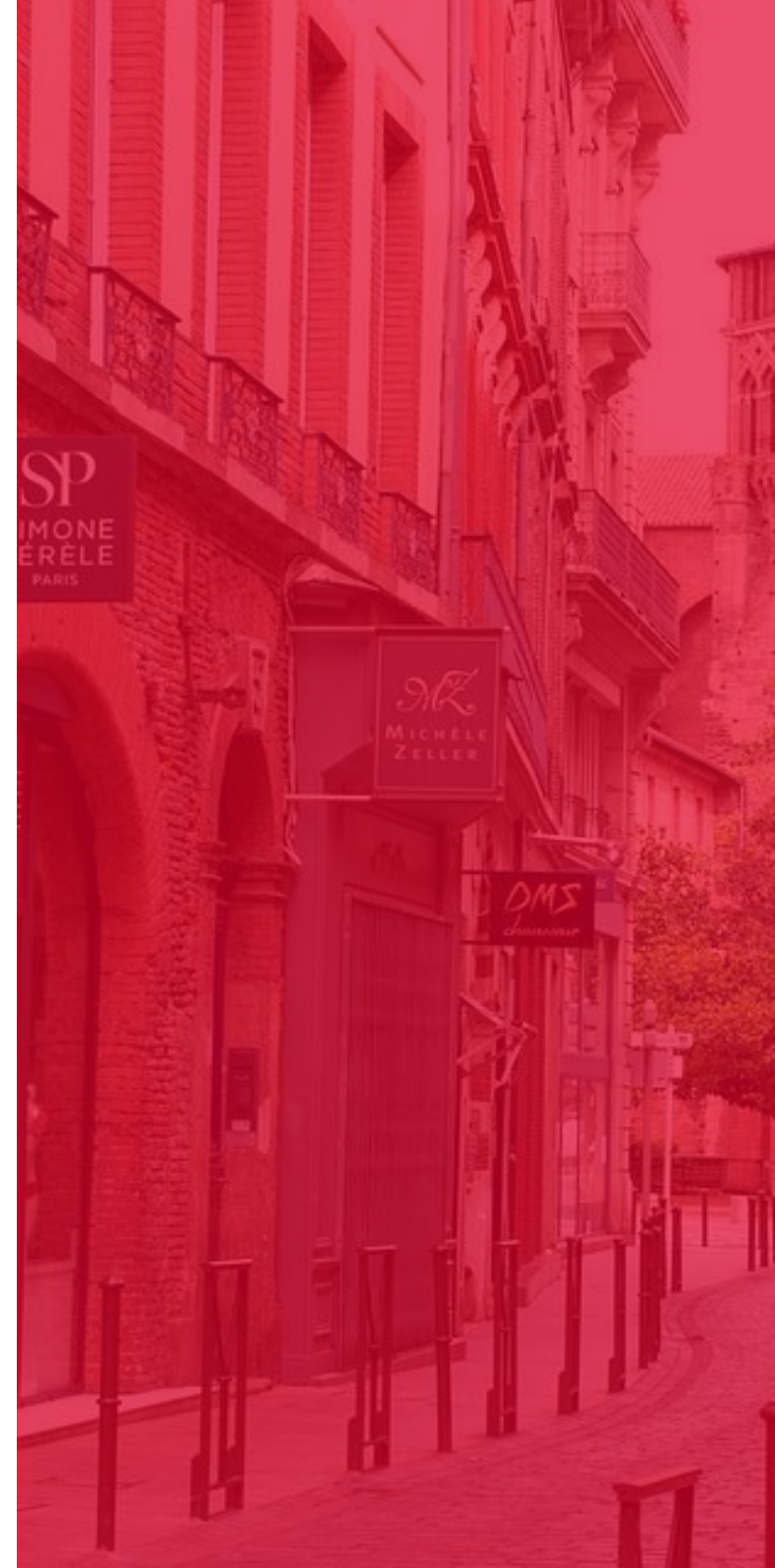
Rue de la Pomme, which links Rue des Arts to Rue Alsace-Lorraine, is one of Toulouse's busiest pedestrian streets and provides consumers with mid to upper-range retailers in the fashion, shoes and accessories sectors (e.g. Lancel, Sandro, Pronovias, Esprit, etc.). Rue de la Pomme runs into Rue des Arts, which is home to upper-range to luxury retailers including Hermes, Repetto, and Longchamp.

RUE SAINT ANTOINE DU TERTRE/ RUE BOULBONNE

Linking Place Wilson to Place Saint Georges, Rue Saint Antoine du Tertre is one of Toulouse's main pedestrian streets and hosts several mass-market to mid-range fashion retailers including Diesel, The Kooples, Maje and IKKS. The street also accommodates a few cafes and restaurants. Rue Saint-Antoine-du-Tertre runs into Rue Boulbonne, a small street hosting mass-market retailers which has been going upmarket over the past five years with the arrival of upper-range fashion retailers including Balibaris and Hugo Boss.

RUE SAINT ROME

Rue Saint-Rome is a pedestrian street linking Place du Capitole to Rue des Changes. Rue Saint-Rome is dominated by fashion, accessories and sport mass-market retailers primarily targeting young customers (e.g. Foot Locker, Jennyfer, Pimkie, Adopt', etc.).



TOULOUSE

MARKET OVERVIEW

KEY AREAS / STREETS/ SHOPPING CENTRES	CONSUMER PROFILE	MAJOR RETAILERS PRESENT	NEW ENTRANTS	TYPICAL RENT FOR 200 SQM UNIT INC. KEY MONEY (€/SQM/YEAR)	RANGE OF UNIT SIZES (SQM)
Rue Alsace-Lorraine	Local shoppers Mass-market retailers	123, Armand Thiery, Bershka, Bocage, Calzedonia, Camaieu, Celio, Etam, FNAC, H&M, Marionnaud, Morgan, Massimo Dutti, Monoprix, NYX, Orange, Pimkie, Swarovski, Superdry, Undiz, Zara, Zara Home	Autan Modes, Dika, Sostrene Grene, Future Primark	1,500-2,000	Up to 2,000
Rue Saint-Rome	Local shoppers Mass-market retailers	Adopt', C&A, Cop. Copine, Célio, La Grande Récré, La Chaise Longue, Foot locker, Levi's, Micromania, Jules, Jennyfer, Pimkie, Pylones, Calzedonia, Intimissimi, Vans	Dr.Martens, Flying Tiger	1,000-1,500	Up to 500
Place du Capitole	Local shoppers, tourists Mass-market to mid-range retailers	McDonald's, Sephora, Mango, The Bodyshop, Nespresso, Pandora,	Nyx Cosmetics, Oxybul	1,700-2,000	Up to 600
Rue de la Pomme/ Rue des Arts	Local shoppers, tourists Mid-range to luxury retailers	American Vintage, Café Coton, Esprit, Father & Sons, Karl Marc John, Nature & Découvertes, One Step, Lancel, Sandro, Hermes, Jb Martin, Monoprix, Pronovias, Repetto, Geox, Swatch, Saint James, Sandro, Sinéquanone,	Antonelle, Jonak, Noushka, Soeur,	1,000-1,500	Up to 150
Rue Saint-Antoine-du-Tertre	Local shoppers, tourists Mass-market to mid-range retailers	Diesel, Aigle, IKKS, Maje, Lush, Sensee, The Kooples Sport, Oliver Grant, Madura		1,000-1,500	Up to 150
Rue Boulbonne	Local shoppers, tourists Mass-market to mid-range retailers	Arche, Balibaris, Cyrillus, Devernois, K-Way, Kusmi Tea, Hugo Boss, La Fille De Margaret,	Blue Apple, Bohemian's, Les Crapules,	1,000-1,500	Up to 150



TOULOUSE

SHOPPING CENTRES

ESPACE SAINT-GEORGES

Opened in 1978, Espace Saint-Georges is adjacent to the commercial heart of Toulouse and a few minutes walk from Rue Alsace-Lorraine. The shopping centre was renovated and extended in 2005-2006 and is now over 14,500 sqm. It offers 38 stores including dominant international mass-market retailers in a wide range of activity sectors (e.g. Zara, Bershka, Oysho, Kiko, New Look, etc.). A redevelopment and refurbishment is planned for this year with the arrival of new retailers and a new name “Les Boutiques Saint-Georges”.

BLAGNAC

Situated close to Toulouse Airport, Blagnac shopping centre opened in 1993 with 48,600 sqm, and is anchored by a Leclerc hypermarket. With more than 140 units, this centre is considered as one of the most important shopping destination of Toulouse’s suburban area. The gallery hosts national and international brands like H&M, Zara, Mango, Maisons du Monde and the first Uniqlo unit in the Toulouse metropolitan area before the opening in town centre. Blagnac shopping centre is part of a strong retail zone hosting a CGR multiplex, Decathlon, Castorama, Alinea and Botanic.

LABEGE 2

Located in South-eastern area of Toulouse close to A62 motorway, Labège2 has 47,700 sqm of retail space after its last renovation in 2008. Anchored by a Carrefour hypermarket, Fnac, C&A, H&M, the shopping centre hosts around 120 units on one level. The Labège2 shopping centre is integrated in a powerful retail zone with Cultura, Botanic, Intersport, etc. and well connected by roadways as well as access by public transportation.

GRAND PORTET

Totalling over 60,000 sqm, Grand Portet shopping centre is anchored by a Carrefour hypermarket, Boulanger and Go Sport. It is one of the main retail hubs in the south of Toulouse and a key destination for international mass-market retailers in a wide range of activity sectors. The shopping centre was extended in 2011 and 2018 so as to renew supply and consolidate visitor numbers with well-known French or foreign chains and food retailers opening in a new space of 6,000 sqm acquired from the hypermarket.

TOULOUSE

SHOPPING CENTRES

CENTRE	CONSUMER PROFILE	RETAILERS PRESENT	NEW ENTRANTS	TYPICAL RENT FOR UNIT OF 200 SQM (INC. KEY MONEY)	RANGE OF UNIT SIZES, SQM
Espace Saint-Georges	Local shoppers Mass-market retailers	Sephora, New Look, Camaïeu, Promod, Etam, Marypaz, Sushi Daily, Casino hypermarket, Claire's, Agatha	Bijou Brigitte, Trois Par 3	500-700	All sizes
Blagnac	Local shoppers Mass-market retailers	Adopt', Bershka, Caroll, Celio, Devred 1902, Etam, Geox, Foot Locker, H&M, IKKS, IDKids, Jules, Kiko, Lacoste, L'Occitane, Lpb, Lush, Leclerc, Levis, Maison du Monde, Mango, Minelli, Nature & Découvertes, Nocibe, O Bag store, Pimkie, Promod, Pylones, Sephora, Stradivarius, Swarovski, Uniqlo, Zara	Bagel Corner, Coyote	700-900	All sizes
Grand Portet	Local shoppers Mass-market retailers	Carrefour, Boulanger, Celio, Cache-Cache, Calzedonia, Caroll, Etam, Ikks, Jennyfer, Jules, Kiko, Levi's, Undiz, New Yorker, Quicksilver, Go Sport, Camaïeu, Foot Locker, Sephora, Pimkie, WeFix, Tresor, Le Barbier,	Le Temps Des Cerises, Okaidi, Sushick	700-900	All sizes
Labège2	Local shoppers Mass-market retailers	Maison 123, Brice, C&A, Camaïeu, Carrefour, Calzedonia, Celio, Comptoir des Cotonniers, Caroll, Desigual, Esprit, Fnac, Hema, H&M, IKKS, Jules, L'Occitane en Provence, MAC, Maisons du Monde, Mango, Nature & Découvertes, Petit Bateau, Promod, The Kase, Undiz, Zara	Adidas, De Neuville, Idkids, La Croissanterie, Malaika Bijoux, Tape à L'Œil, Orange, Un Jour Ailleurs, Sergent Major	700-900	All sizes

TOULOUSE

FOOD & BEVERAGE

The Toulouse region boasts a rich culinary tradition. Local produce such as “foie gras” and “truffles” are key ingredients for many prestigious chefs around the world.

Most culinary spots in Toulouse are within walking distance of one another. Some are specialized in regional cuisine, offering delicious meals in cosy environments such as Le Bruit qui Court, Brasserie Le Capoul or Le Bistro Toulousain-La Maison du Cassoulet. Le Van Gogh or L’Air de Famille offer sublimated traditional fare such as preserved duck or gizzards.

Located nearby Place du Capitole, the two-Michelin-star Restaurant Michel Sarran is Toulouse’s most prestigious establishment. The city centre also boasts famous gastronomic restaurants (1 Michelin-star) including Les Jardins de l’Opéra or Py-r and Le Cénacle close to le Pont Neuf.

	CONSUMER PROFILE	FOOD & BEVERAGE OPERATORS
Place Saint-Georges	Local residents, tourists	Le Van Gogh, Chez Emile, Monsieur Georges, Le Wallace
Place du Capitole	Local residents, tourists	Les Jardins de l’Opéra, Le Bibent, Le Florida
Place Saint-Sernin	Local residents, tourists	7 Place Saint-Sernin
Place du Président Wilson	Local residents, tourists	Brasserie Du Capoul, Le Bon Vivre, Le Cardinal
Quartier Pont-Neuf	Local residents, tourists	Le Cénacle, Py-r



CHRISTIAN DUBOIS

Head of Retail Services France

Cushman and Wakefield LLP

Etoile Saint Honoré

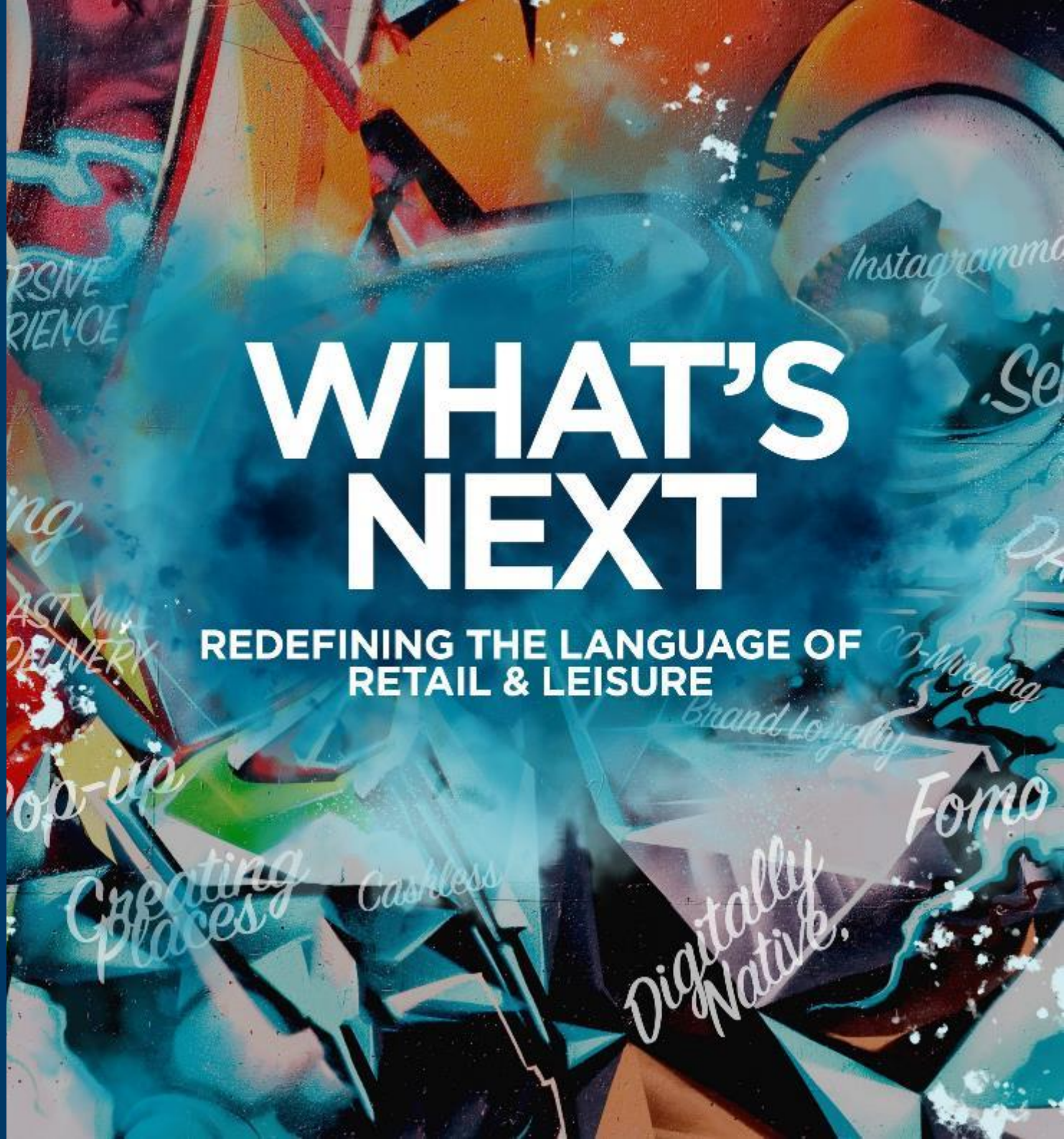
21 rue Balzac

75008 Paris

Tel: +33 01 53 76 92 96

Mob: +33 06 71 01 43 01

Christian.dubois@cushwake.com



WHAT'S NEXT

REDEFINING THE LANGUAGE OF
RETAIL & LEISURE



No warranty or representation, express or implied, is made to the accuracy or completeness of the information contained herein, and the same is submitted subject to errors, omissions, change of price, rental or other conditions, withdrawal without notice, and to any special listing conditions imposed by our principals.

© 2019 Cushman & Wakefield LLP. All rights reserved.