



THE CLUR SHOPPING CENTRE INDEX

H1 2023 HEADLINE PERFORMANCE

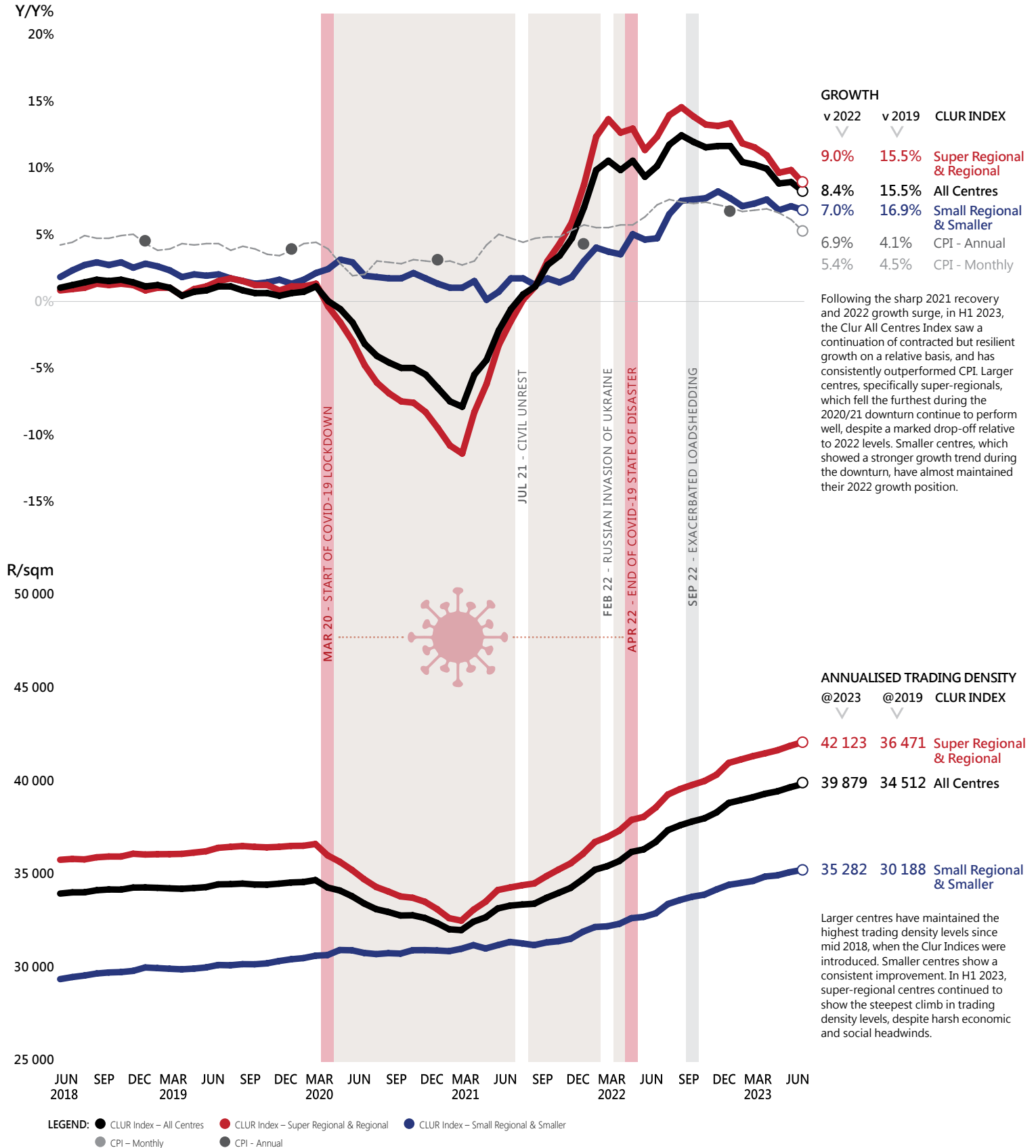
Your live view on retail

THE CLUR SHOPPING CENTRE INDEX H1 2023 - HEADLINE PERFORMANCE



The Clur Shopping Centre Index is derived from The Clur Report, an asset management industry standard, **tracking performance** at more than **4 million sqm of prime retail space** across South Africa and Namibia, for listed and unlisted property funds.

CONSOLIDATED TRENDS: ANNUALISED TRADING DENSITY (LOWER) & Y/Y% GROWTH (UPPER)

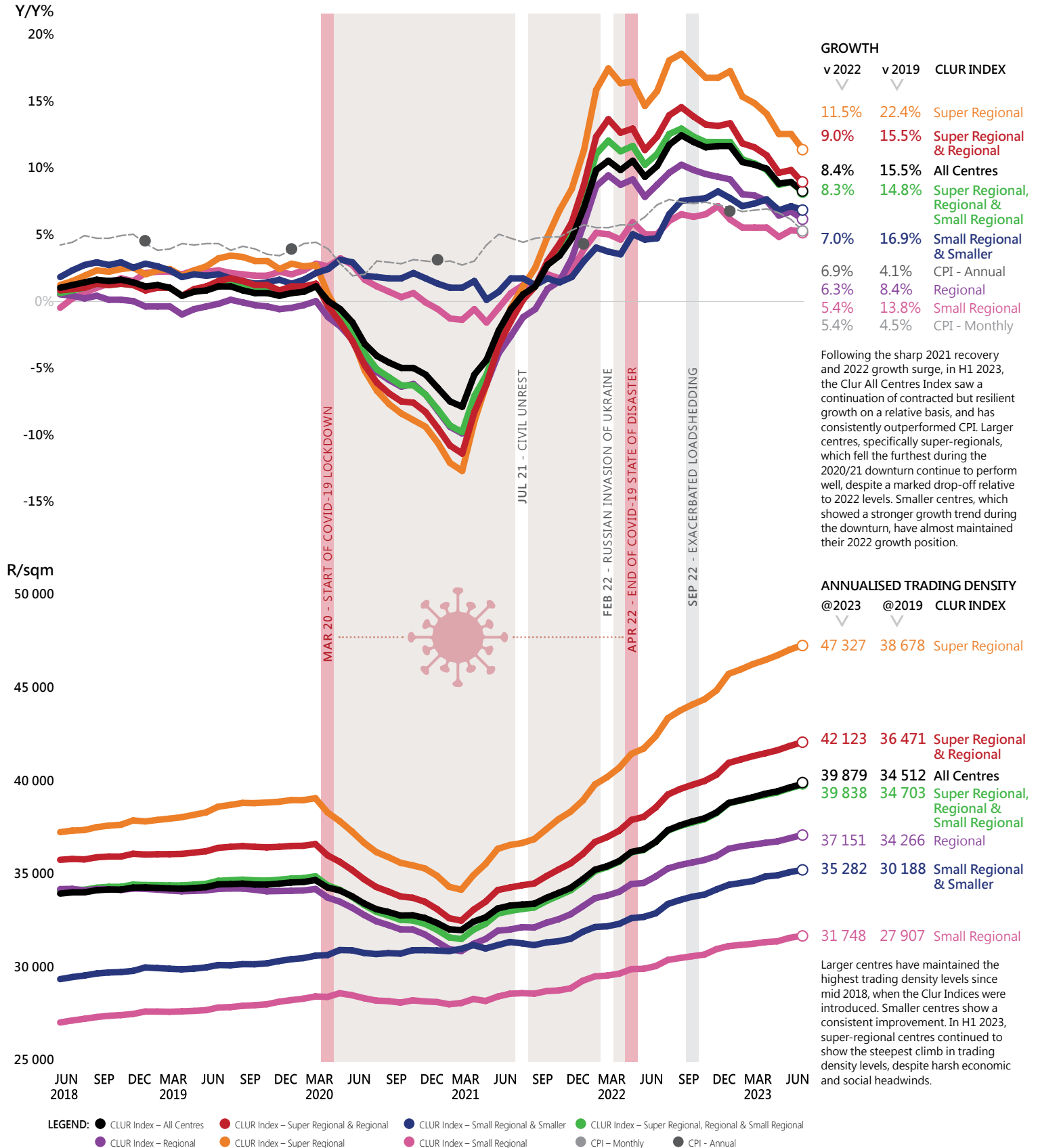


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CONSOLIDATED TRENDS: ANNUALISED TRADING DENSITY (LOWER) & Y/Y% GROWTH (UPPER)



THE CLUR SHOPPING CENTRE INDEX Q1 2023 - CATEGORY PERFORMANCE



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CATEGORY SNAPSHOT: CLUR – ALL CENTRES ANNUALISED TRADING DENSITY & Y/Y% GROWTH

DOMINANT CATEGORY	MAR 23 R/sqm	MAR 23 VS MAR 22	MAR 23 VS MAR 19	2018 VS 2017	2019 VS 2018	2020	2021	2022	TOP PERFORMING SUB CATEGORY	MAR 23 VS MAR 22	MAR 23 VS MAR 19
						VS 2019	VS 2020	VS 2021			
Luggage & Leatherware	64 369	55%	48%	1%	3%	-35%	19%	79%	Luggage & Leatherware	55%	48%
Entertainment & Family Activity Centres	6 347	51%	-9%	-2%	1%	-44%	-15%	85%	Movies/ Cinemas	73%	-14%
Motor Related Sales & Services	25 889	30%	18%	-18%	-18%	-16%	18%	28%	Car & Motorbike Sales	70%	23%
Food Service	48 010	21%	22%	1%	5%	-18%	13%	24%	Bars	46%	20%
Barrows/ Kiosks (<=10sqm)	162 847	17%	20%	-7%	-5%	-12%	20%	15%	Barrows/ Kiosks (<=10sqm)	17%	20%
Books/ Cards/ Stationery Supplies	31 478	17%	-6%	2%	-4%	-22%	1%	19%	Cards/ Stationery/ Party Supplies	16%	-11%
Gyms & Fitness Centres	6 157	14%	-15%	34%	10%	-21%	-14%	11%	Gyms & Fitness Centres	14%	-15%
Food Speciality & Bottle Stores	61 014	13%	24%	10%	1%	0%	8%	11%	Ice Cream & Frozen Yoghurt Stores	26%	25%
Speciality	27 211	13%	5%	-3%	-5%	-9%	3%	14%	Travel Stores	88%	25%
Sports Equipment & Outdoor Goods	36 057	12%	-2%	-4%	-3%	-20%	7%	17%	Sports Equipment & Outdoor Goods	12%	-2%
Technology	103 158	11%	56%	4%	-2%	11%	25%	13%	Cell Phones & Supporting Services	21%	25%
General Services	30 675	11%	3%	7%	-2%	-19%	8%	15%	Dry Cleaning & Repairs/ Tailors/ Laundromat	24%	16%
Apparel	37 961	11%	15%	1%	-1%	-11%	13%	14%	Shoes	17%	7%
Accessories, Jewellery & Watches	114 666	10%	18%	1%	2%	-11%	16%	13%	Investment Jewellery	52%	18%
Grocery/ Supermarket	41 203	10%	21%	1%	2%	2%	4%	9%	Supermarket (1,000-4,999sqm)	12%	24%
Health, Beauty, Grooming & Wellness	69 475	8%	11%	2%	1%	-4%	4%	9%	Hairdressers & Hair Accessories	26%	4%
Eyewear & Optometrists	63 670	8%	8%	4%	2%	-5%	2%	8%	Sunglasses Stores	11%	26%
Department Stores	30 661	6%	5%	0%	2%	-11%	6%	8%	Junior Department Stores (2 500-4 999sqm)	8%	20%
Homeware, Furniture & Interior	24 904	2%	10%	0%	-2%	2%	6%	3%	Furniture	5%	17%

MANY CATEGORIES HAVE SEEN SUBSTANTIAL IMPROVEMENTS SINCE THE 2020 COLLAPSE, DESPITE AN ONGOING HARSH ECONOMIC AND SOCIAL CLIMATE

Category growth is ranked against 2022. Rates are also shown relative to the pre-Covid 2019 year.

All dominant and top performing sub categories **show positive growth** relative to 2022, against 79% relative to 2019.

Highest trading densities are shown by Barrows/ Kiosks, Accessories, Jewellery & Watches, and Technology (**162 847, 114 666 and 103 158 R/sqm**)

Highest trading density y/y% is shown by Luggage & Leatherware, Entertainment & Family Activity Centres and Motor Related Sales and Services (**55%, 51% and 30%**)



NOTES

1. The Clur Report of SA Retail Property, a widely used asset management support and indexing platform tracking performance and trends, covers over 4 million square metres of prime retail space across SA and Namibia. The subscription base represents prominent JSE Securities Exchange listed and unlisted property funds spanning over 100 shopping centres/ nodes. The linked Clur Index represents 97% of this square metreage, excluding Namibian and certain non-qualifying assets.
2. The Clur Indices are issued based on the most up to date data supplied by the relevant funds at the time of consolidation. Please note that funds sometimes make retro-active adjustments to their data.
3. Please note that the standard Clur International (Pty) Ltd Disclaimer applies to these indices.

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