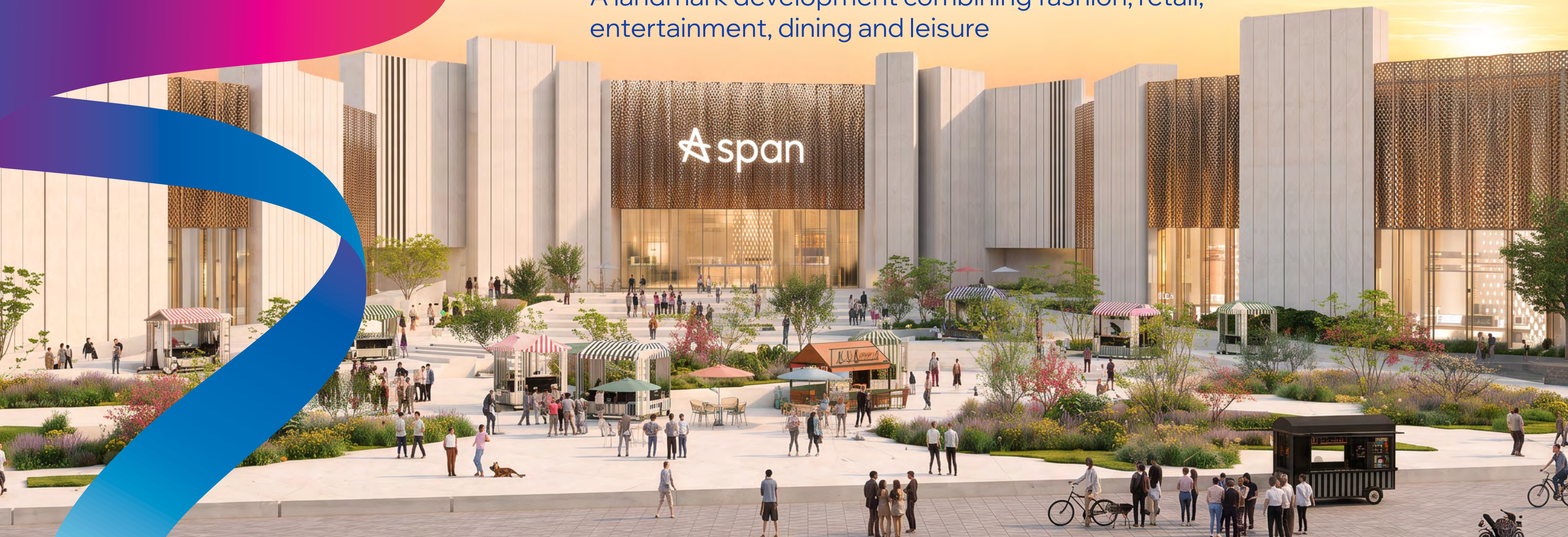




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ASTANA'S LARGEST FASHION, RETAIL & ENTERTAINMENT DESTINATION

A landmark development combining fashion, retail,
entertainment, dining and leisure



Key figures

GBA 240 000 m²
GLA 120 000 m²

360+
stores

3 913
parking spaces, including:

2 572 indoor multi-level parking
731 underground parking
610 surface parking spaces

50 600 m²
entertainment

2 retail levels
12–14 mln visitors per year

opening
Q2 2028



Kazakhstan

A Leading Economy in Central Asia

Demographics
20,3 million

population

63% **≈1,2%**
urban population annual population growth

31 years
average age

Economy
\$306 billion

GDP

6,5% **+7,5%**
GDP growth retail trade growth





Astana

A Fast-Growing Market for International Retail

Demographics

1,6 million

current population

2 million

projected population by 2030

35%+

population growth
over five years

Purchasing power

\$ 1 270

average monthly nominal salary

Nº1

among Kazakhstan's
major cities by average salary

Tourism

736 000

76% domestic tourists
24% international tourists
77% visit for leisure, events
and shopping*

6–8 months

cold season (below –20°C)
driving demand for year-round indoor shopping
and entertainment

Source: Astana city administration *



Astana Retail Market

Strong Demand, Limited Quality Supply

A Large Consumer Market

≈\$7,92 billion

retail turnover in 2025

14,3%

of Kazakhstan's total retail turnover

High Occupancy

97,6%

occupancy across leading
quality shopping centers

3 shopping centres with a strong
concentration of major international
and national brands

Limited Quality Supply

≈282 m² GLA

per 1,000 residents

Almaty — 382 m²
Moscow — 532 m²

The market opportunity

Astana combines a sizeable retail market with high occupancy and limited quality supply, creating room for new international retail destinations.



Why the market needs ASPAN

Key findings of market research

Shopping & Fashion Drive Visits

83% visit for shopping and entertainment

41% visit primarily for shopping

46–60% visit primarily for fashion & footwear

Visits Convert into Purchases

87% make purchases during visits

51% purchase during almost every visit

59% make impulse purchases up to **\$100**

Choice & Switching

89% value a wide store selection

65% would visit a new shopping center

41% have switched from their usual centers

Source: Consumer behavior market research, Astana, August 2026



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Shopping & Leisure

42% visit primarily
for leisure & entertainment

83% see shopping
centers as destinations
for shopping + leisure

F&B

83%
regularly use F&B

72% are high-frequency,
high-spend F&B visitors

F&B choice influences
where people spend time



Illustrative visualizations. Not an approved concept.



ASPAN

A wide and diverse choice of Fashion,
Entertainment & F&B - all in one destination

01.

A Strong Fashion Offer

A broad selection of international fashion, beauty, lifestyle and other brands gives customers more choice and more reasons to shop at ASPAN.

02.

Entertainment That Extends the Visit

Astana's largest entertainment cluster. **50,600 m²** of entertainment including **18,800 m²** entertainment parks for all ages, **9,800 m²** cinema with **17** screens and **22,000 m²** all-season waterpark.

03.

F&B That Extends Dwell Time

A **4,000 m²** Food Hall, restaurants, cafés and Food Court give customers more reasons to stay, meet and spend time at ASPAN.

04.

Easy Access for Everyday Shopping

3,913 parking spaces and direct access from major city routes make ASPAN convenient for both planned shopping trips and spontaneous visits.

05.

Growing Catchment

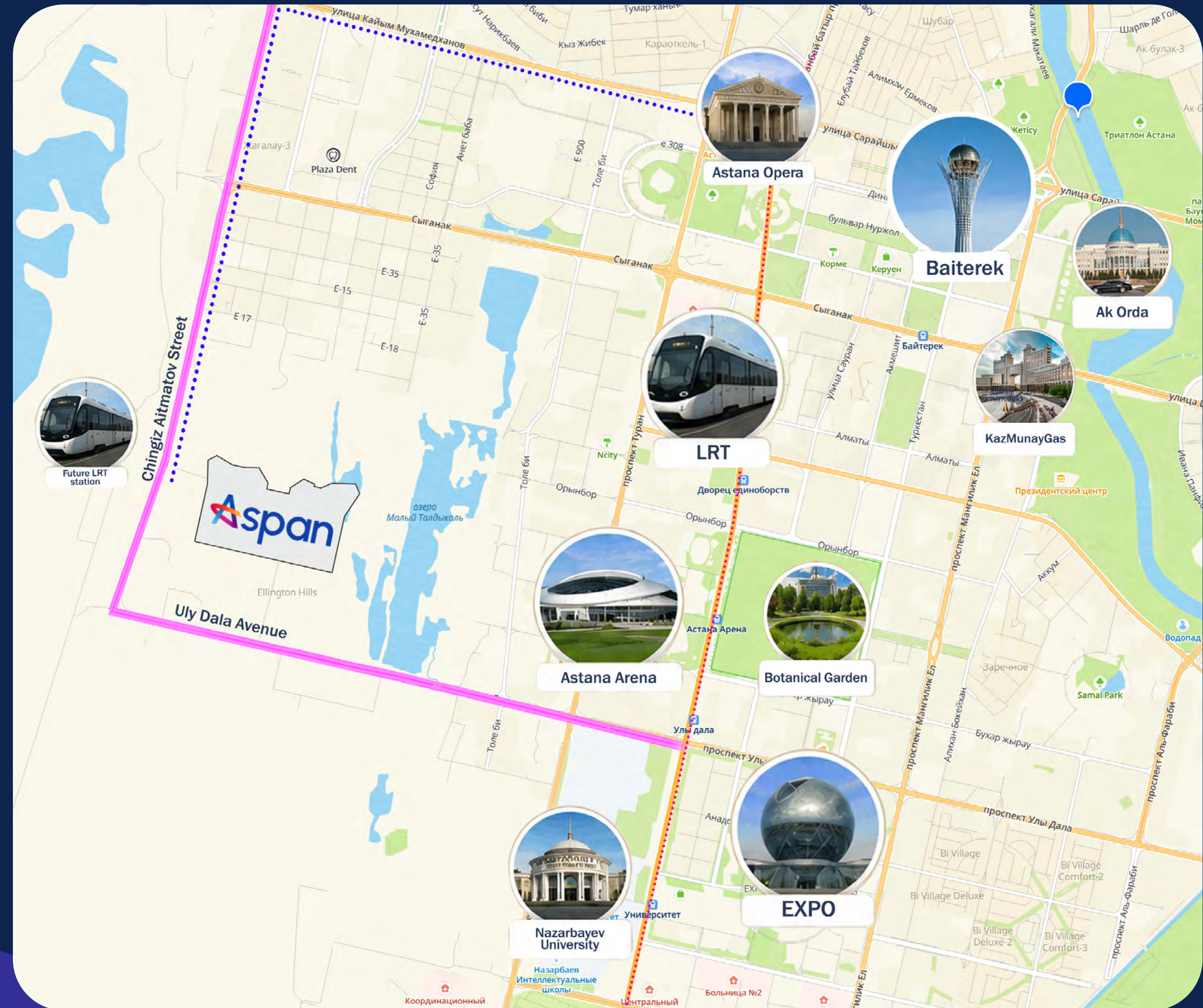
420,000+ residents within a 20-minute drive, with continued residential development expanding the local audience.



A High-Potential Location in Astana's Growth Corridor

ASPAN is positioned at the intersection of Nura District's main thoroughfares, connecting Uly Dala Avenue and Chingiz Aitmatov Street — two major transport corridors linking the project with key areas of the city.

Located within one of Astana's fastest-developing districts, ASPAN is surrounded by expanding residential development, new housing and rapidly improving urban infrastructure.



A Growing Catchment Within Easy Reach

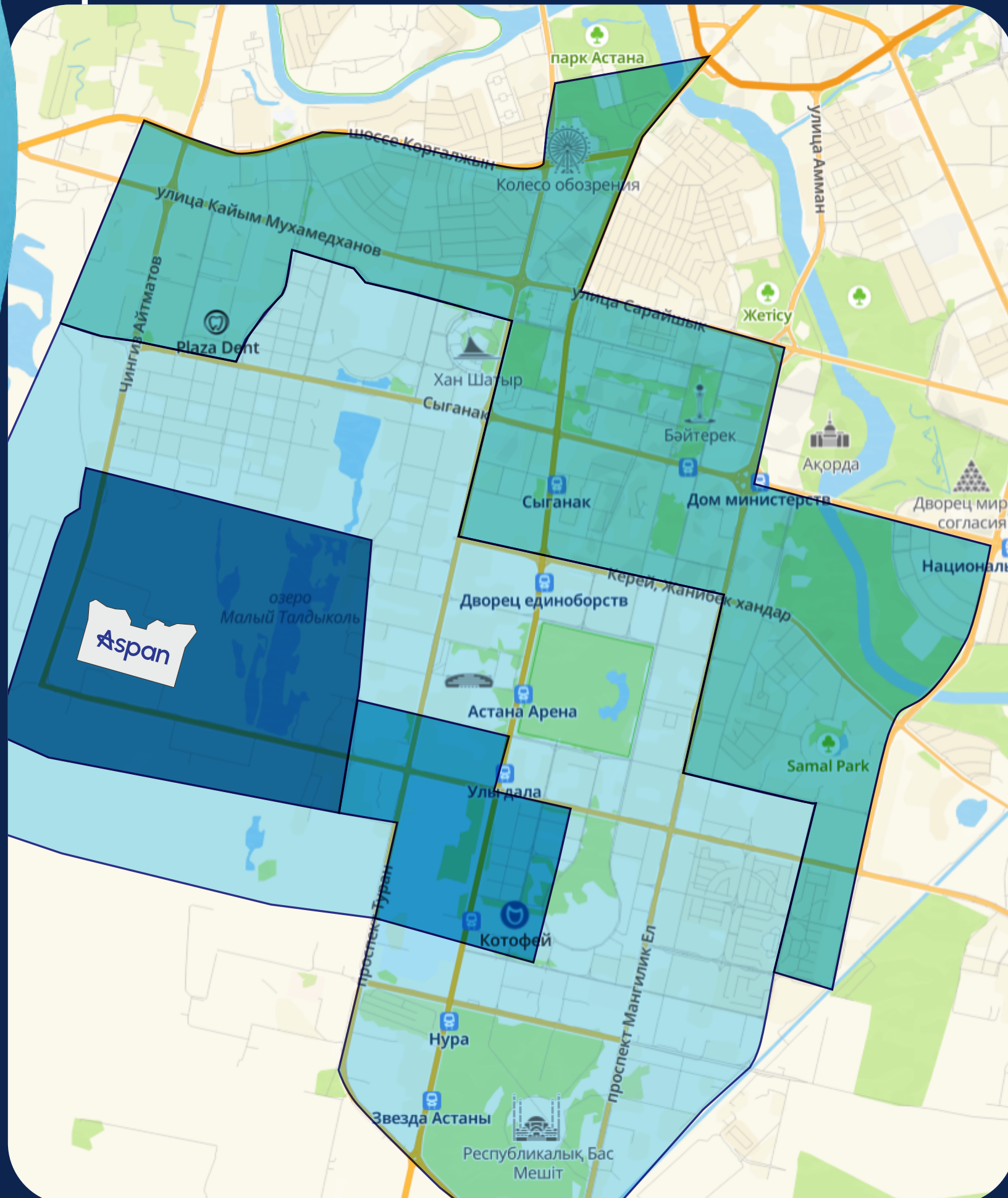
Immediate Catchment

83,000–85,000 residents within a 15-minute walk
100,000–120,000 projected by 2028

A Catchment That Keeps Growing

ASPAN is not relying on a fixed catchment.
The catchment itself is expanding.

New residential development is continuously adding households around the project, creating a growing customer base for fashion, dining and entertainment.



Drive-Time Catchment

400,000 – 420,000 residents within a 20-minute drive
480,000 – 520,000 projected within 3–5 years

- 5-minute drive- time catchment
- 10-minute drive- time catchment
- 15-minute drive- time catchment
- 20-minute drive- time catchment

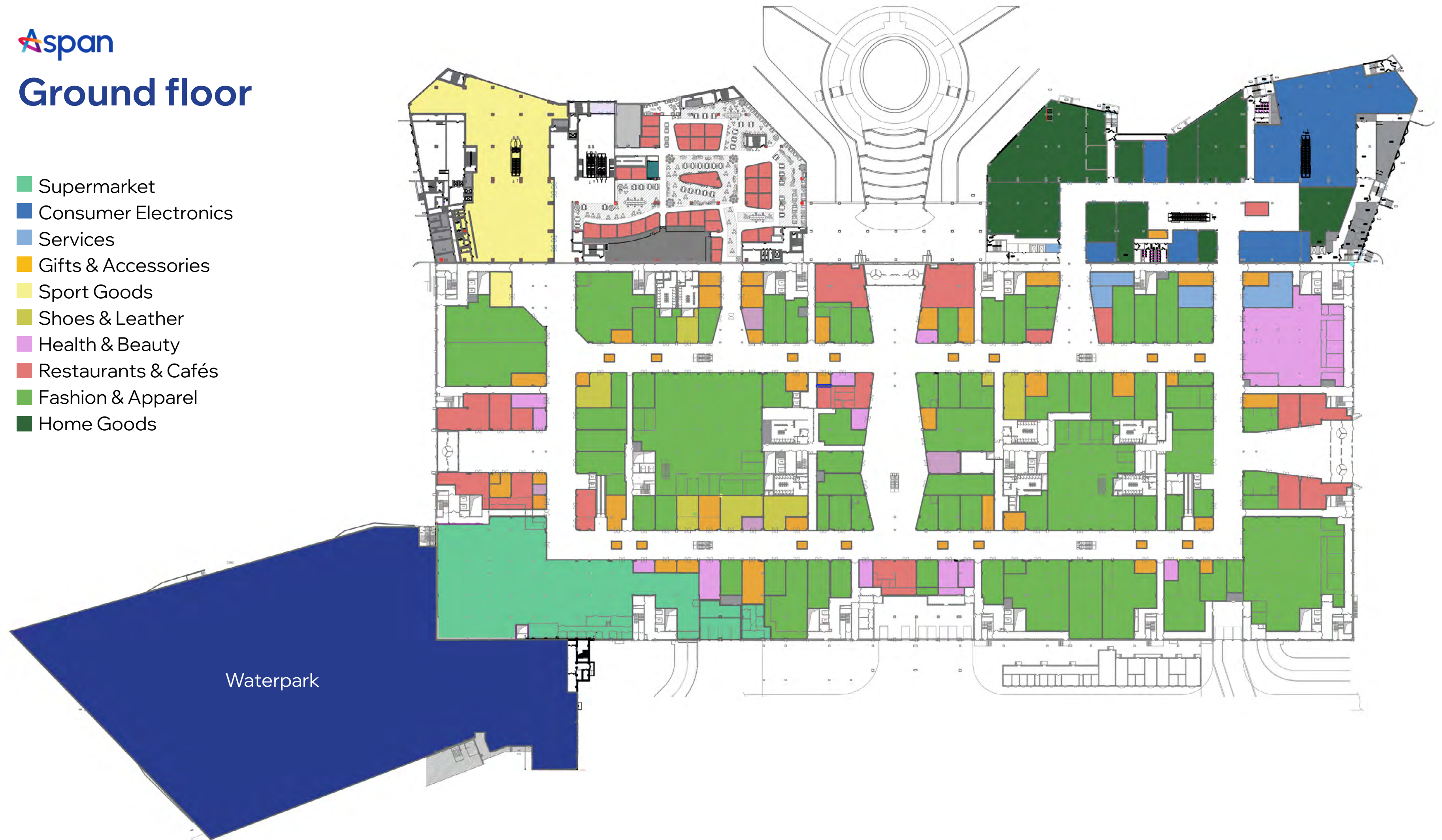


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Plans

Ground floor

- Supermarket
- Consumer Electronics
- Services
- Gifts & Accessories
- Sport Goods
- Shoes & Leather
- Health & Beauty
- Restaurants & Cafés
- Fashion & Apparel
- Home Goods



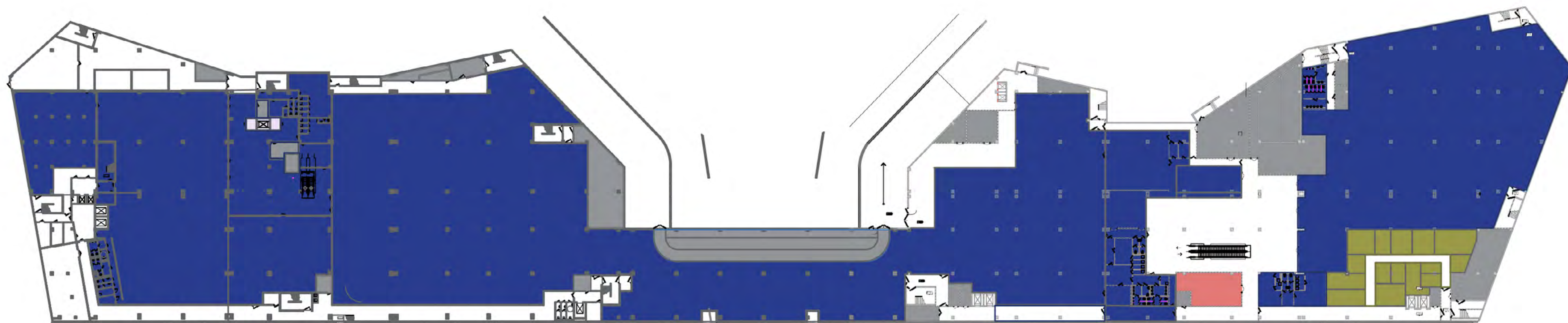
1st floor

- Entertainment
- Food Court
- Fashion & Apparel
- Children's Goods
- Sport Goods
- Restaurants & Cafés
- Gifts & Accessories
- Services
- Shoes & Leather
- Waterpark
- Fitness
- Technical Rooms



-1 level

- Entertainment
- Restaurants & Cafés
- Technical Rooms
- Warehouses



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Renders

Architects

CallisonRTKL | USA

Masterplan Architect

International architecture and design firm responsible for the masterplan of the mixed-use district, with ASPAN as a key component.

DOWEN FARMER ARCHITECTS | UK

Lead Architect

British architecture practice responsible for ASPAN's architectural concept and design development.

The team brings extensive international experience from leading global practices, including Benoy, Foster + Partners, Heatherwick Studio, BDP, Grimshaw and Populous.







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