

ROMAN

O A S I S

Creating and Nurturing Transit Retail
and Commercial Ecosystems.

ROMAN
GROUP



MUMBAI

M E T R O R E T A I L

Creating and Nurturing Transit Retail
and Commercial Ecosystems.



PRESENTATION

O U T L I N E

- Mumbai Metro
- Transit Retail
- Us



2023



Mumbai Metro



Transit

Mumbai hosts the World's 8th Densest Network in the World.

Travellers

Corporate and Family Travellers with Disposable Income.

Premium

A premium and comfortable travel experience, catering to 50% of Suburban Population.





Mumbai Metro

Mumbai Metro with 10 lines is an urban Mass Rapid Transit System (MRTS) being built to serve Mumbai, Maharashtra's capital and largest city.

Its development has been entrusted to the Mumbai Metropolitan Region Development Authority (MMRDA)

In June 2019, a new nodal agency called Maha Mumbai Metro Operations Corporation (MMMOCL) was established for operating and maintaining all Mumbai Metro services on lines owned by MMRDA

Active Metro Lines

Line 1 - Ghatkopar -- Versova (Blue Line)

Line 7 - Dahisar East -- Andheri East (Red Line)

Line 2A - Dahisar East -- D.N. Nagar (Yellow Line)

Upcoming Line in 2024

Line 3 - Aarey -- Cuffe Parade (Aqua Line)





Line 1

Fully elevated line comprising of **12** stations across 11.4 kms stretch between Ghatkopar and Versova

Line 2A & 7

Fully elevated lines comprising of 30 stations across 35 kms stretch.

Line 2A

17 stations between Andheri West to Dahisar East, along the link road.

Line 7

13 stations between Andheri East to Dahisar East, along the WEH.





Line 3

Fully underground line comprising of **27** stations across 33.5 kms stretch.

Phase 1 September 2024

Aarey to BKC

Phase 2 June 2025

BKC to Colaba





The Transformation of Mumbai's Metro Stations: Transit Oriented Retail Spaces.

India Transit Retail

Parameters	Period	Airport	Metro	Railways	Roads	Bus Station	Total
Existing passenger traffic (Million, annual)	2019	349	2,623	16,134	190*	29,561	-
Retail market							
Estimated market size (USD billion, annual)	2019	1.4	0.6	0.1	0.1	0.01	2.2
Current retail opportunity (USD billion, annual)	2019	1.7	1.2	1.0	1.7	0.2	5.7
Projected retail opportunity (USD billion, annual)	2030	9.3	5.6	1.9	4.2	0.9	21.6

Transit Retail



Transit-oriented retail involves the development of commercial spaces, outlets and other amenities at the metro stations with the aim to provide convenient and accessible services to commuters, as well as generate revenue for the metro system.

These retail spaces are designed to provide a seamless shopping experience for commuters, with a focus on easy access, convenience, and affordability.

By incorporating transit-oriented retail, the Mumbai metro system aims to encourage the use of public transportation, reduce traffic congestion, and promote sustainable urban development. **It creates opportunities for businesses to grow and thrive in a transit-friendly environment.**



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Creating vibrant community hubs.

By integrating retail spaces into the design of Mumbai's metro stations, we are fostering the creation of vibrant community hubs where people can live, work, and play in one place.



Enhancing public transportation.

Transit oriented retail spaces can also help to enhance public transportation usage by providing commuters with convenient access to essential services and amenities.



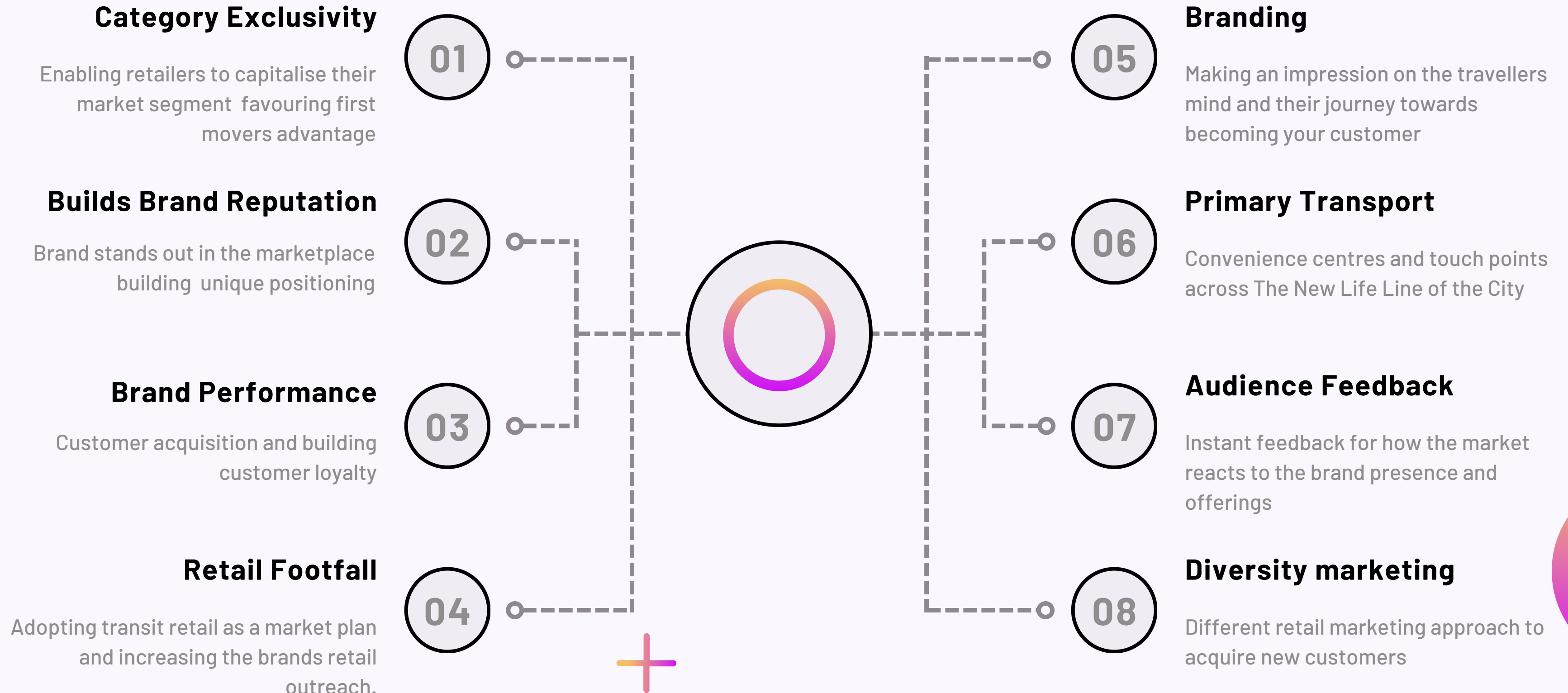


Fostering economic development.

Retail spaces on metro stations have the potential to spur economic development in surrounding areas, creating opportunities for new businesses and employment for local residents.



Why Transit Retail



Key USPs

Fastest growing network in Mumbai, with over 10 lines connecting the city like never before

The current lines are the core artilleries of the metro network which will be interconnecting the other lines

Category exclusivity for the brands to avoid cannibalisation, hence first movers advantage

As the transit experience is more refined, It has designated retail spaces and an orderly atmosphere, rider persona is more driven towards making decisions and transacting on the spot itself

Online ordering friendly



Constant increase in footfalls



Category Mix



Primary Categories

QSR, F&B, Convenience Store, Pharmacy, FMCG, BFSI

Retail

Clothing, Accessories, Footwear, Gifting

Experiential

Coaching, Gyms, Real Estate, Travel & Tourism, Spas,
Entertainments, Co-working



Key stats for Metro

500 operational Metro Stations across **21** Indian Cities

> **1,000 kms** length of metro under construction in India

4.7 mn passengers travel daily by Delhi Metro

> **0.4 mn** Daily ridership for Mumbai Metro at just **11 kms** of operational length

Non-fare box revenue share only **12%** for Delhi Metro

2.6 bn passengers travelled by Metro in 2019 and **7.3 bn** annual passenger traffic estimated for 2030

USD 5.6 bn total retail opportunity Metros by 2030 with a

USD 0.8 bn total lease rent opportunity for operators by 2030

USD 1.0 bn of current retail opportunity for railways to reach

1.9 bn by 2030

Annual passenger traffic of railways to touch


18.2 bn by 2030

Stats for transit retail at the airport for reference

	Indira Gandhi International Airport	Chhatrapati Shivaji Maharaj International Airport	Kempegowda International Airport
City	New Delhi	Mumbai	Bengaluru
Retail revenue (USD billion, annual)	0.44	0.33	0.13
Mall	Select City Walk	Oberoi Mall	Brigade Orion Mall
Retail revenue (USD billion, annual)	0.22	0.14	0.15
Airport revenue as a multiplier of Mall revenue	2.0	2.4	0.9




Mumbai: Metro 2A,7 to generate Rs 100 cr through non-fare box revenue



According to Auctus Advisors – StudioPOD consortium, who are the transaction advisors to the MMMOCL, overall 80,000 sqft commercial space at stations is available for rent on both the lines, including the under-construction path as well. Around 17,500 sqft space is available at Andheri west station alone. This space has been rented out to banks for ATMs, food & beverage outlets and master concessionaires, they apprised.

Shadab Siddiqui from Auctus Advisors said, "This is already the highest non-fare monetization by any metro authority in the country, given that there is no land available to Mumbai metro for property development unlike Delhi and Hyderabad metros."



Metro Retail Opportunity PAN India

2019

2.6 billion

Annual passenger traffic

USD 0.6 billion

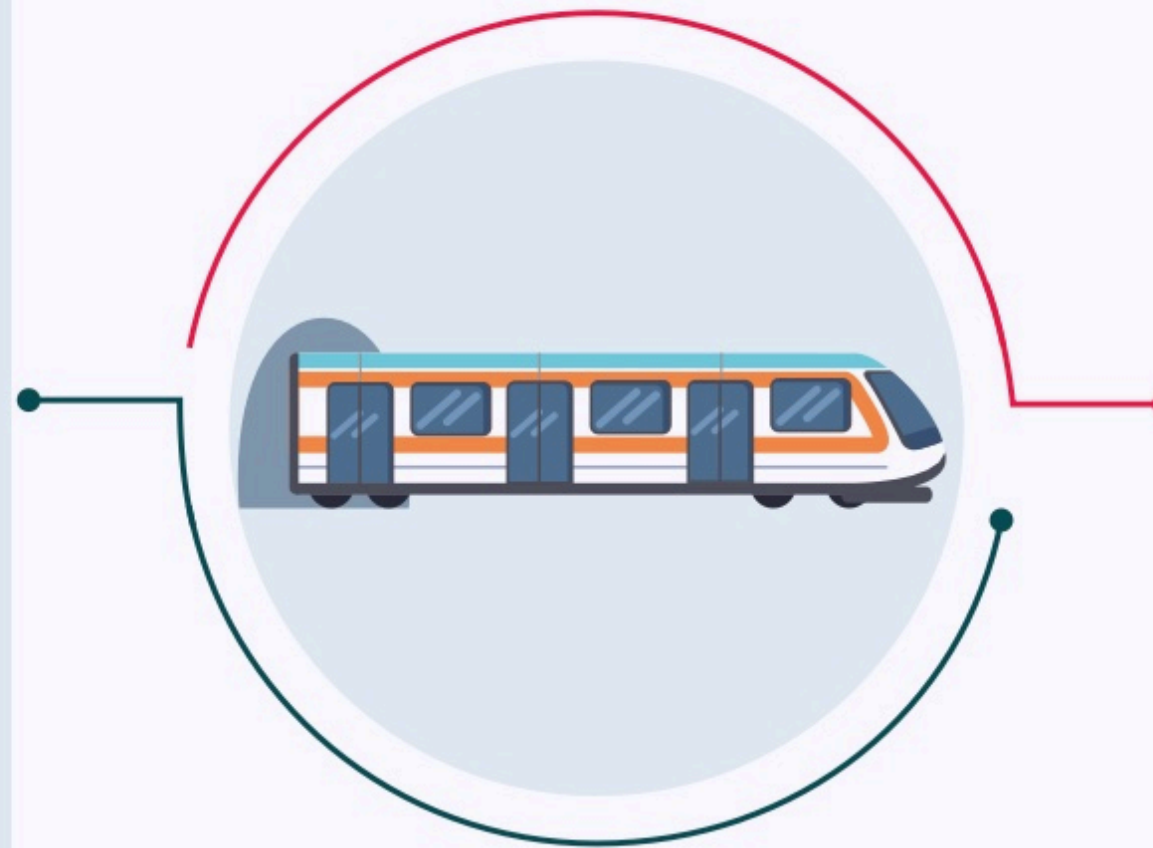
Estimated market size

USD 1.2 billion

Current retail opportunity

USD 0.2 billion

Total lease rent opportunity for
Metro Station Retail



Source: Knight Frank Research
Exchange rate: USD 71.6 | Inflation at 5%

2030

7.3 billion

Annual passenger traffic

USD 5.6 billion

Projected retail opportunity

USD 0.8 billion

Total lease rent opportunity for
Metro Station Retail





is the consultancy arm of Roman Group that has been in the forefront of the transit retail oriented ecosystem specialising in the leasing of commercial real estate on metro lines in Mumbai.

We are dedicated to assisting businesses establish a strong presence in high-traffic transit hubs, providing them with unparalleled opportunities to connect with their target audience and maximize their brand potential.



We understand the significance of strategic location when it comes to retail success. With our exclusive focus on Mumbai Metro stations, we offer you access to prime real estate at the heart of the city's bustling transportation network. Our transit retail spaces place your business right in the path of thousands of commuters, ensuring maximum visibility and footfall.

Our experienced team of consultants will guide you through every step of the process, from selecting the ideal space to negotiating lease terms, compliance with regulatory standards and optimizing your retail strategy.

We are dedicated to building long-term partnerships. With us, you gain a trusted consultant and a valuable collaborator in your retail journey.



Organizations we work with



MMOPL



MMRC



MMRDA



MMMOCCL



DMRC

Brands advised



Discover the unlimited potential that retailing at
Mumbai Metro ecosystem, hold for your business.

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Thank *you*