



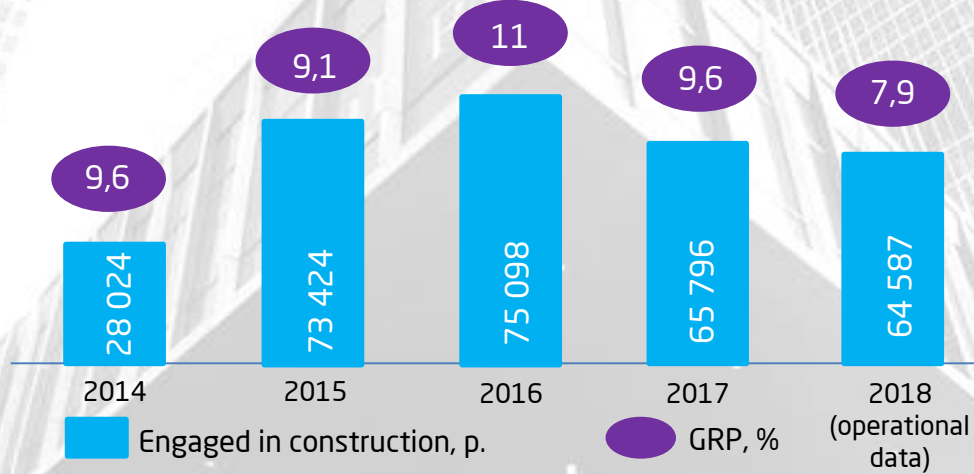
ASTANA  
INVEST

# DEVELOPMENT

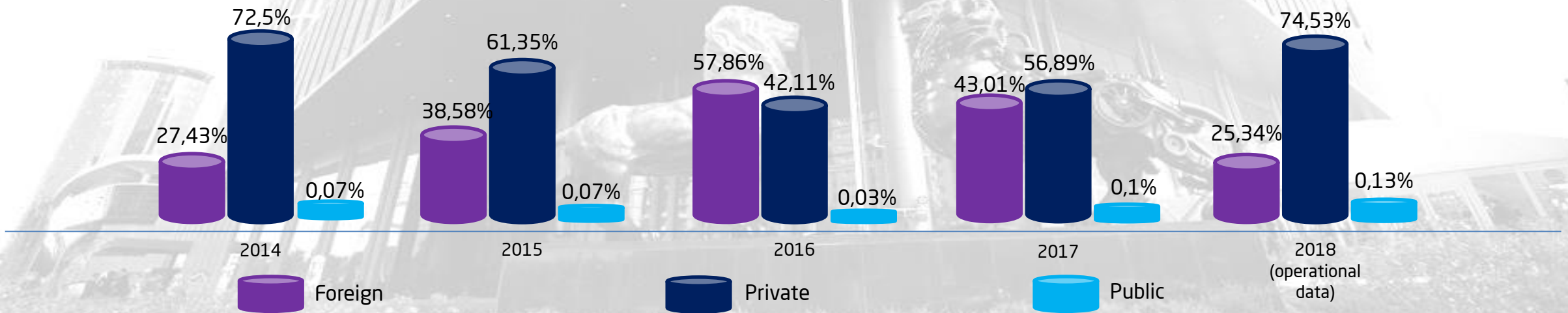


# Construction in Nur-Sultan city

Share of construction in the structure of GRP, %



Volume of work performed by ownership of business entities \*

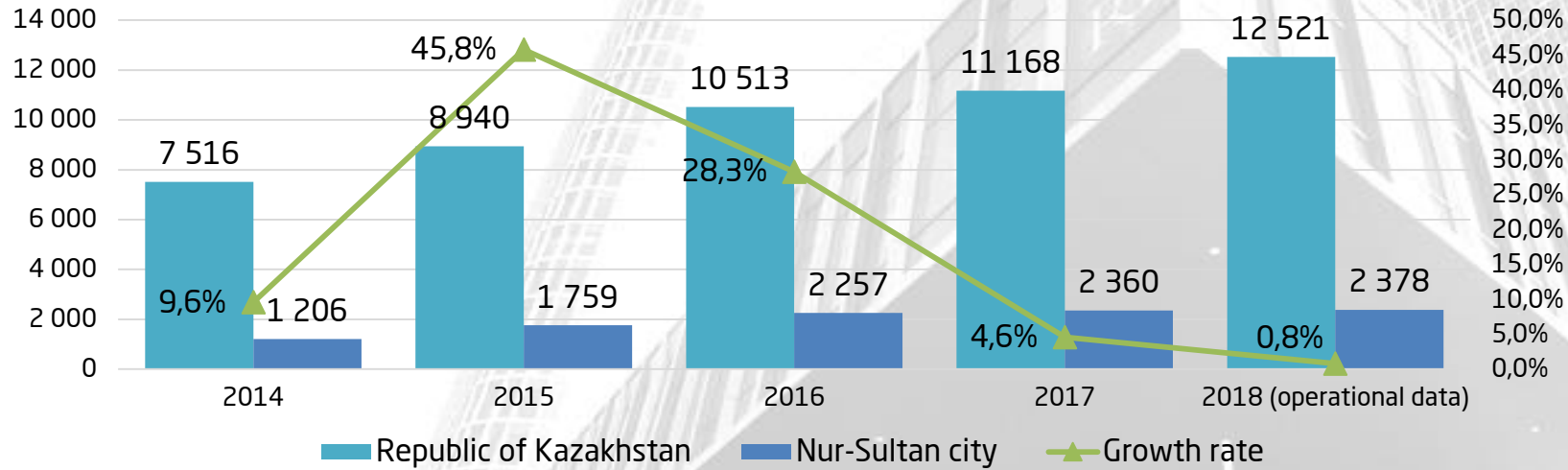


✓ Volume of work performed increased in 1,8 times (from 280,9 bln. tenge until 506 bln. tenge).

\*According to data of Statistics Committee of the MNE RK

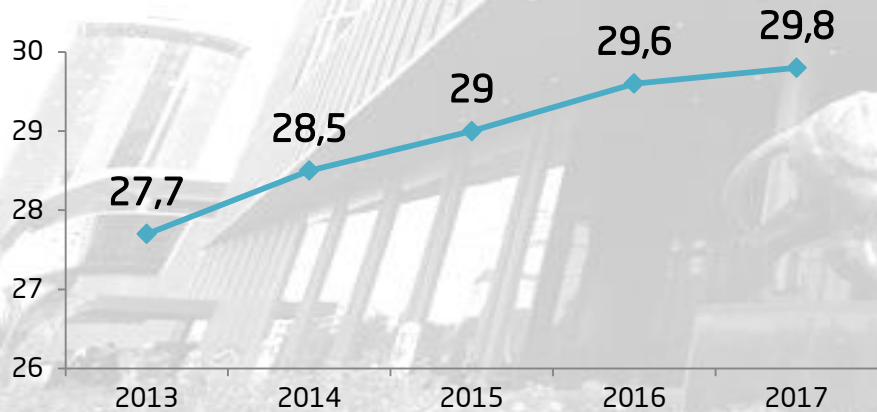
# Scope of housing market in Nur-Sultan city

Total area of commissioned housing, m<sup>2</sup>\*



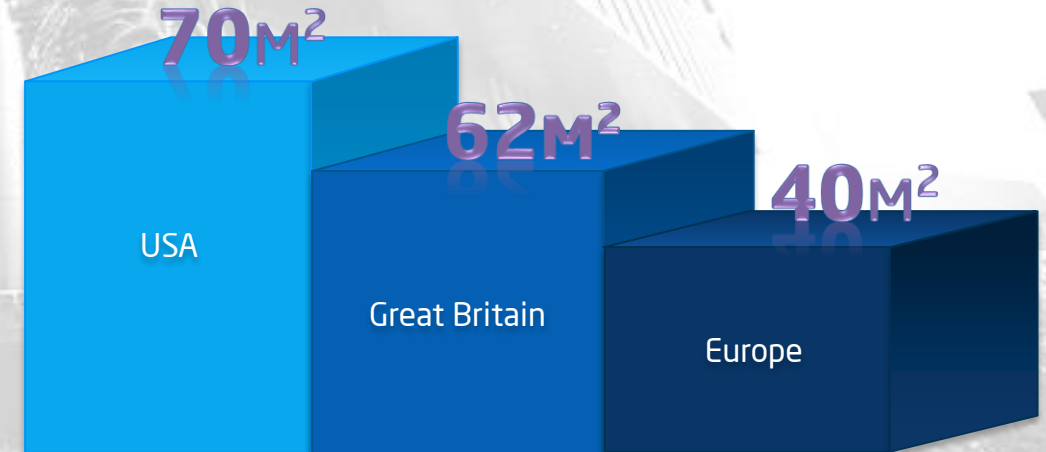
Over the past 5 years annually put in operation on average - 2 million m<sup>2</sup> of housing

Housing provision of population, m<sup>2</sup> per one person in Nur-Sultan city



Housing provision index is increasing annually on average on 0,4 m<sup>2</sup>

Housing provision of population over the world

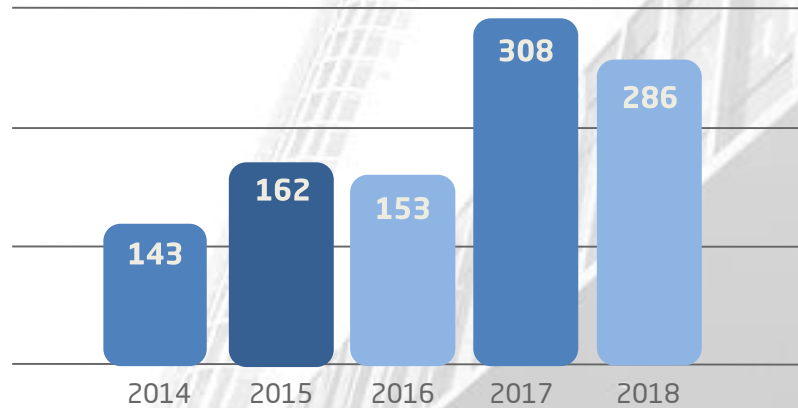


\*According to data of Statistics Committee of the MNE RK



# Investments in housing construction in Nur-Sultan city

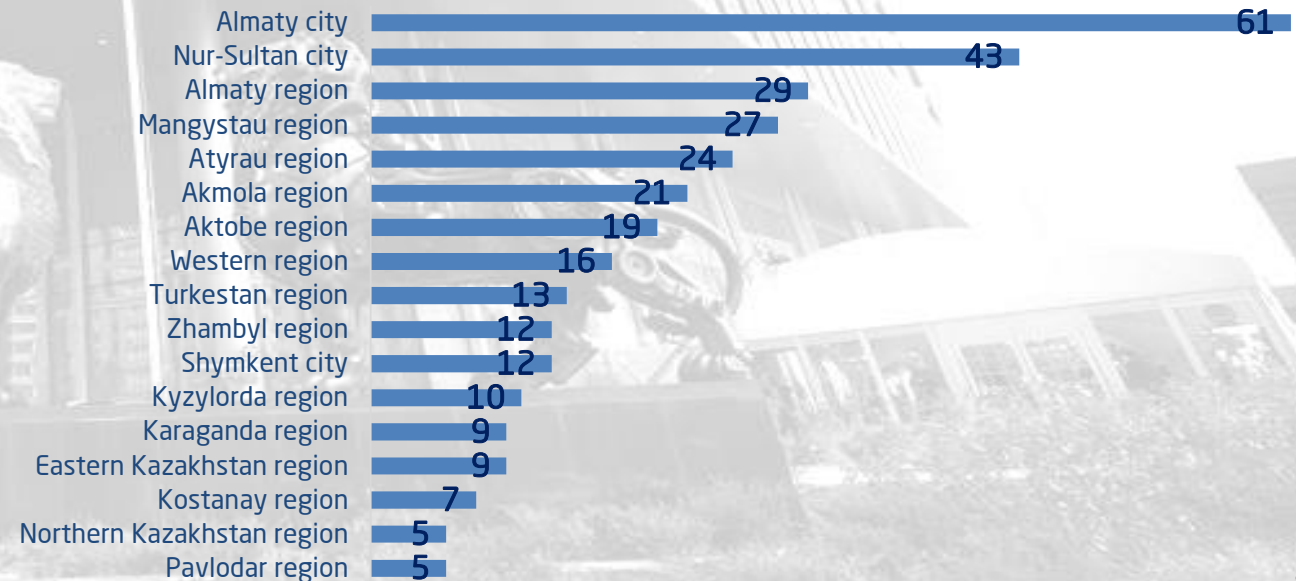
Investments in housing construction in Nur-Sultan city, bln. tenge\*



Growth more than **2 times** in 5 years

Nur-Sultan on the **2nd place** in the Republic of Kazakhstan on investments in housing construction

Investments in housing construction in Nur-Sultan city, January-April 2019, bln. tenge\*



\*According to data of Statistics Committee of the MNE RK

# Business centers of Nur-Sultan city\*

**A**  
11 BC

273 200 M<sup>2</sup>  
\$24-\$59\*\*\*

80%\*\*

**B**  
58 BC

709 200 M<sup>2</sup>  
\$12-\$24\*\*\*

96%\*\*

**C**  
41 BC

177 600 M<sup>2</sup>  
\$8-\$12\*\*\*

90%\*\*

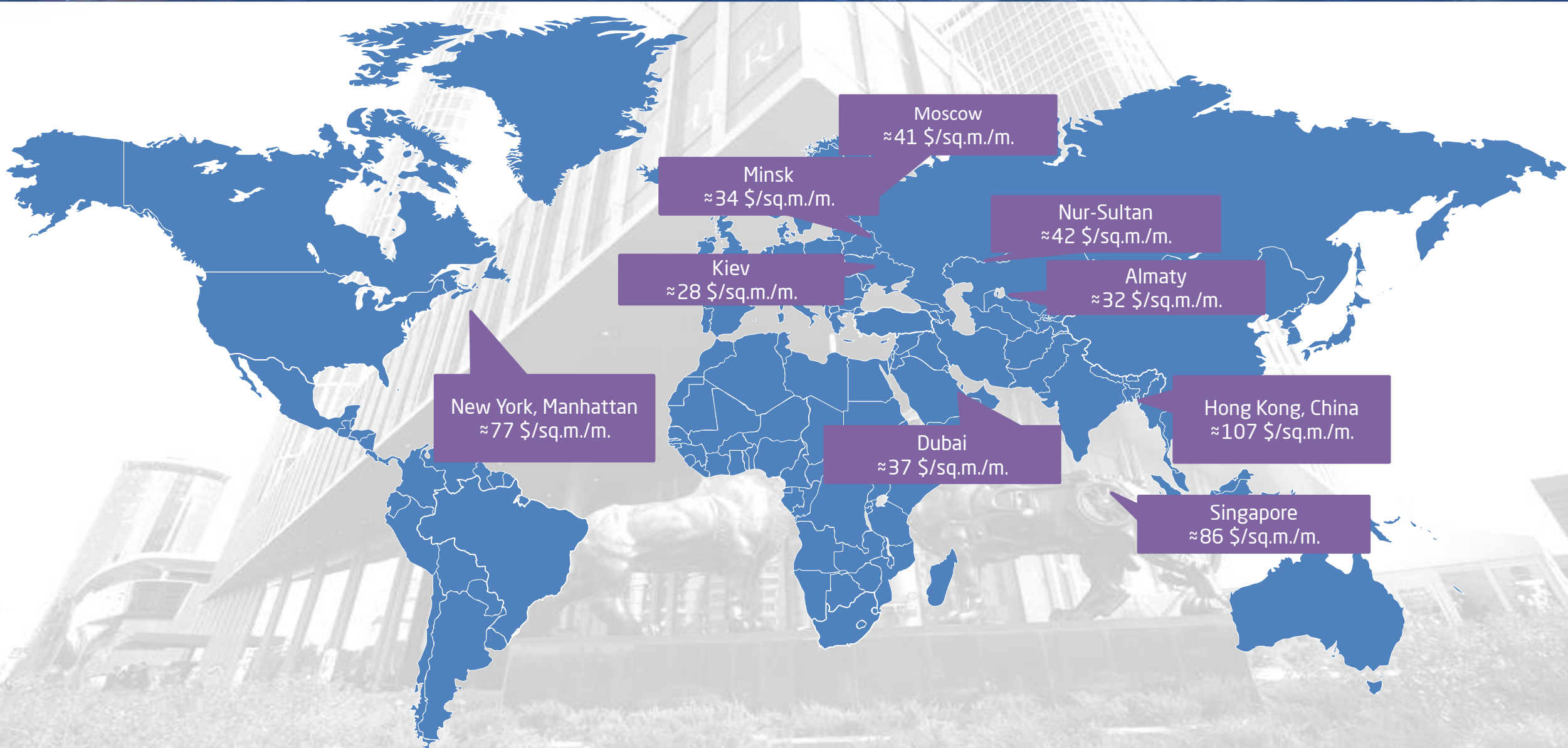
\*According to data of the company Tetin

\*\*Occupancy

\*\*\* Rental rate per m<sup>2</sup>



# Office rental rates of class A in the world



# Scope of market. Retail property in Nur-Sultan city

*Distribution of retail properties in districts of Nur-Sultan city\**

|                | «Almaty» | «Yessil» | «Saryarka» | «Baikonur» |
|----------------|----------|----------|------------|------------|
| Shopping malls | 2        | 7        | —          | —          |
| Supermarkets   | 15       | 23       | 17         | 27         |
| Hypermarkets   | 4        | —        | —          | 2          |
| Markets        | 4        | —        | 13         | 8          |

Area of shopping malls -  
**690 000 m<sup>2</sup>**

Area of markets -  
**341 176 m<sup>2</sup>**

Rental rate  
in shopping mall -  
**\$5 - \$100** per m<sup>2</sup>

Rental rate  
street retail -  
**\$45** per m<sup>2</sup>



# Retail property in Nur-Sultan city

## Commercial objects under construction in Nur-Sultan city



Respublika Plaza

Total area- 100 000 m<sup>2</sup>

Trade area- 45 000 m<sup>2</sup>

Address - Respublika avenue -  
Imanova street

Data of launch - 2019 r.



Abu Dhabi Plaza

Total area- 332 700 m<sup>2</sup>

Trade area- 47 000 m<sup>2</sup>

Address - 14 Syganak street

Data of launch- 2020 r.

## The availability of retail space in the world (rental area, m<sup>2</sup> for 1 000 people)\*

Moscow -  
405 m<sup>2</sup>

Warsaw -  
810 m<sup>2</sup>

Nur-Sultan -  
688 m<sup>2\*\*</sup>

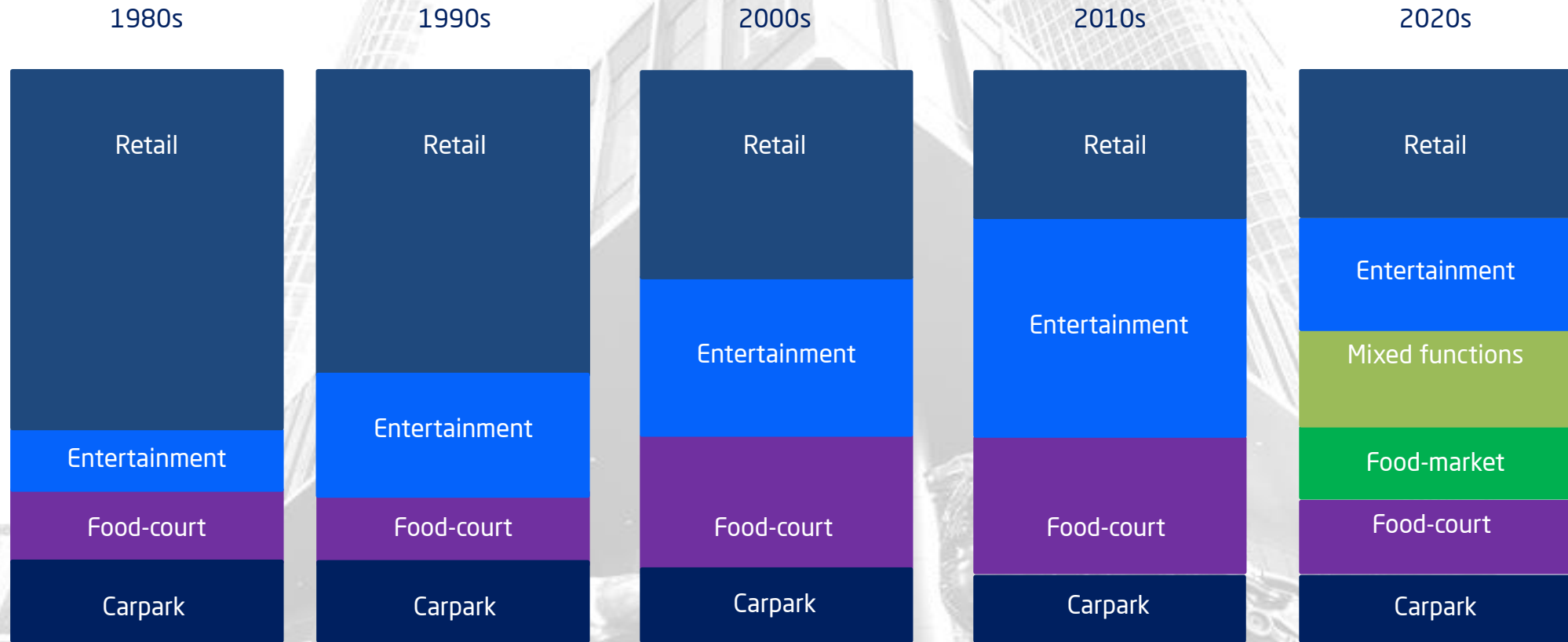
Kiev -  
504 m<sup>2\*\*\*</sup>

St. Petersburg -  
528 m<sup>2</sup>

\* According to data of the company Knight Frank  
 \*\* According to data of LLP «Scot Holland»  
 \*\*\* According to data of the company Ukrainian Trade Guild



# EVOLUTION OF TENANT-MIX IN SHOPPING MALLS\*



Shopping centers/malls become centers of communication and move from simple formats to multi-functional ones. Food courts of the new type Try and Buy appear, farmers markets appear (object in the object), coworking, libraries, museums, theaters, educational centers, kindergartens - in general, everything that will force the visitor to spend as much time as possible with pleasure.

# Additional need for residential and commercial real estate in Nur-Sultan city

## Projects in residential sector\*

- The need for housing for the next 5 years - **6,12 mln.m<sup>2</sup>**
- Indicator for housing provision of population - **29,8 m<sup>2</sup>**
- The growth of housing provision annually averages - **0,4 m<sup>2</sup>**
- Annual growth rate of the city's population - **40,0 thousand people**

## Projects in commercial sector\*

- Supermarkets (500-1500 m<sup>2</sup>) - **15 units**
- Shopping malls (85 000 - 100 000 m<sup>2</sup>) - **3 units**



# WE ARE READY TO COOPERATE



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