



# GLOBAL CITIES

## RETAIL GUIDE

2025 EDITION

Better never settles



# TALLINN OVERVIEW

**Tallinn is the capital of Estonia and its largest city, with a population of 461,000 as of 2024. Tallinn is located in the northwest part of Estonia. Tallinn's Old Town is one of the best preserved medieval cities in Europe and is listed as a UNESCO World Heritage site. Tallinn is the major political and financial centre of Estonia.**

First established in the early medieval era, today's Tallinn is an exciting mix of old and new. Tallinn Old Town is one of the best preserved Hansaetic town centres in the world. Close to the Old Town and sea shore there is a modern city centre with office blocks, hotels and shopping centres.

Tallinn is the first point of entry to Estonia for most visitors. Tallinn Passenger Port is close to the city centre and the airport is just a few minutes away, with good accessibility by tram.

Branded retail in Tallinn is mainly concentrated in a few shopping centres: Viru, Ülemiste, Rocca al Mare and Kristiine, T1 Mall of Tallinn. Some other, relatively small, retail formats exist and cover more specific demand.

There is no traditional high street in Tallinn, but Viru Centre, a modern shopping mall with an integrated bus station in the heart of the city, has assumed a similar role. Along with the Rotermanni Quarter, which is rapidly developing into a multi-functional area, and the evolving harbor district, these areas create a vibrant urban shopping and leisure experience. Together, they form a modern interpretation of a high street, blending commerce, culture and connectivity between the city and the sea.

Tallinn has a remarkable development pipeline, which is anticipated to enhance the attractiveness of the city centre even more. The retail in the city centre mainly caters to tourist demand, with various retail schemes located in the outskirts catering more to locals. The market is driven by modern shopping centres and hypermarkets.





# TALLINN

## Key Retail Streets & Areas

### VIRU SQUARE

Viru Square (Viru väljak) was a square in the centre of Tallinn until 2002 when the construction of Viru Centre (SC) began. Viru Centre has a focal position in this area and there are other schemes such as the old Postimaja and Foorum which are located on the other side of Narva Road. Viru Centre has been combined with the pre-existing Kaubamaja department store. Viru Centre has a unique position because of its connectivity to the bus station which creates a very large number of visitors.

### OLD TOWN (VANALINN)

This area was quite active throughout the Soviet era and is now popular among tourists. The only exemption is related to the night life which attracts local youngsters as well. There is no typical retail in this area any more, but still a few boutiques are located here along with plenty of cafes, restaurants and pubs.

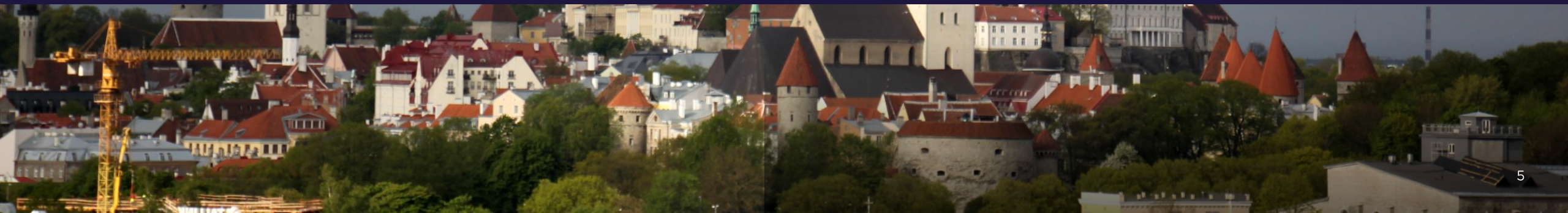
### ROTERMANN QUARTER

Newly built ROTERMANN QUARTER, located between the Old Town, the port, and Viru Square. The Rotermann QUARTER sits within walking distance from the A and B terminals of the Port as well as from Viru Hotel and Viru Centre. The Rotermann Quarter gives visitors an extraordinary opportunity to spend quality time in quieter and smaller urban areas, discovering shops, restaurants, and wine bars fit for both everyday life and occasions that are more refined.

### SHOPPING CENTRES AND HYPERMARKETS

Excluding Viru Centre in the very central area there are three big shopping centres including Rocca al Mare, Ülemiste and Kristiine. All of these attract from large catchments and are well-known not only for shopping but also for leisure.

Shopping centres and/ or hypermarkets exist in all major suburbs and are often located in close proximity to major roads. The shopping centres have tried to reposition themselves through expanding their leisure offer and there are remarkable food corners and leisure areas in almost all shopping centres.



# TALLINN

## Market Overview

KEY AREAS / STREETS/ SHOPPING CENTRES	CONSUMER PROFILE	MAJOR RETAILERS PRESENT
<b>VIRU SQUARE</b>	Premium, luxury. Tourists, limited local shoppers	Adidas Originals, American Vintage, ARKET, Askona, Apranga, BonBon Lingerie, Calvin Klein, Calzedonia, Denim Dream, ECCO, Euronics, Gant, GIVEN, Goldtime, GRENARDI, Intimissimi, Jo Malone London, iDeal Group AS (Apple) Kaubamaja, Klick, L Cosmetics, Lloyd, Mango, Marc&André, Marc O'Polo, Marciano by Guess, Max Mara Fashion Group, Massimo Dutti, Nike, Pandora, PINKO, Rieker, Rahva raamat, SALAMANDER, Sportland, Timberland, Tommy Hilfiger, The North Face, Watch Wear,
<b>OLD TOWN/ VANALINN</b>	Premium, luxury. Tourists	Ilvo Nikkolo, Emporio Armani, MaxMara, Marina Rinaldi, Marc Cain, Eagle Vision, Gant, Demini, Lindex, Braccialini, Shoeshop, Soft Gold
<b>STOCKMANN (department store)</b>	Premium, luxury. Local shoppers	Stockmann
<b>ROCCA AL MARE SC</b>	Mass market. Local shoppers	Selver, Prisma, Apolla kauplus, Apelsin, Calvin Klein Underwear, Camel Active, Chester, Change Lingerie, Cropp, Denim Dream, ECCO, Euronics, Flying Tiger Copenhagen, Guess, Goldtime, H&M, Jack&Jones, Klick, Levi Strauss & Co, Lindex, Marc O'Polo, New Yorker, Pepco, Rademar, Reserved, Skechers, Sportland, Tom Tailor, Tommy Hilfiger
<b>ÜLEMISTE SC</b>	Mass market. Local shoppers	Rimi, Zara, Lacoste, Reserved, Lindex, Marc O'Polo, Sportland, Rademar, Sports Direct, JYSK, H&M, ALDO, CCC Shoes & Bags, Chester, New Yorker, PEPCO, Takko, Denim Dream, ESPRIT, Goldtime, Guess, Intimissimi, Ideaal Kosmeetika Betty Barclay, Klick, MATKaSPORT, Trampolino, Gym!, Apollo kino ja raamatupood, O'Learyse, Olympic Casino Flying Tiger Copenhagen, Tommy Hilfiger.

# TALLINN

## Market Overview

KEY AREAS / STREETS/ SHOPPING CENTRES	CONSUMER PROFILE	MAJOR RETAILERS PRESENT
KRISTIINE SC	Mass market. Local shoppers	Apollo kino ja kauplus, APRANGA, Blender, Camel Active, Cropp, Deichmann Denim Dream, ECCO, Euronics, Flying Tiger Copenhagen, Goldtime, H&M, JYSK, Klick, Levi Strauss & Co, Mohito, New Yorker, PEPCO, Prisma, Rademar, Reserved, Rieker, Sangar, Skechers, Sportland, Sports Direct, Tom Tailor, Tomas Gold,
SOLARIS SC	Mass market and high end. Local shoppers	Apotheka, Apollo kino ja kauplus, Delice Solaris Food Market, Desire, Douglas, Duglas, Flying Tiger Copenhagen, Given, Goldtime, GYM!, Hata, Hemtex, iDeal, Miniso, S`NOB, SHOESHOP, WATCH WEAR,
JÄRVE SC	Mass market. Local shoppers	Aatrium Sisustuskaubamaja, Apollo kauplus, Bio4You, Denim Dreami, Goldtime, Hektor Light, Home4you, Humana, Klick, MATKaSPORT, Ohoo Outlet, PEPCO, Rademar, Selver, Sportland, Weekend, Unolik, Seiklusmaa, Olympic Casino, Fitpoint
LASNAMÄE CENTRUM SC	Mass market. Local shoppers	Rimi, Apollo, Euronics, Instrumentarium, Jysk, Klick, Kodeekstra, Monton, Mosaic, Sportland
T1 MALL OF TALLINN	Outlets. Entertainments	Skywheel of Tallinn, Super Skypark, Cinamon, Rademar Outlet, Sportland Outlet, Denim Dream outlet, Salamander Outlet, Ohoo Outlet, NS King BONUS Outlet, Ideaal outlet, HC Pro Outlet, Sportplus Outlet, Tomas Gold, Selver, Hot Lips, Lidl soon to be open
NAUTICA SC	Mass market. Local shoppers, tourists oriented	Alta, BABYBACK RIBS & BBQ, Blender, CHI, Cropp, Deichmann, Denim Dream, Evelatus, FLYING TIGER COPENHAGEN, Goldtime, H&M, Hemtex, Horret, House, HUPPA, Instrumentarium, JYSK, Marc & André, Miniso, Mora



# TALLINN

## Shopping Centres

### VIRU CENTRE

Viru Centre is not only a shopping centre, at the centre you can find world famous and local brands, plus several restaurants and cafes. Having the best location in the very centre of Tallinn, with the bus station downstairs, Viru Centre is a hub connecting the city centre with almost all residential neighbourhoods. Due to this, the number of visitors to the Viru Centre is much higher compared to any other shopping centre in Tallinn. Retailers vary from mass market to premium and luxury. The shopping centre was renewed in 2023.

### JÄRVE

Located at the beginning of VIA Baltica, Järve opened in 2002 and was renovated in 2023. It is known “as the biggest home and interior design centre in the city. Approximately half of the centre is occupied by home furniture stores.

### ROCCA AL MARE

Situated at a road junction in a western part of Tallinn, Rocca al Mare shopping centre benefits from its location, professional management driven by the owner Citycon and also its tenant mix. Within the area surrounding the centre there are several entertainment facilities. Expansion plans for the shopping centre have been announced.

### SOLARIS

Solaris situated in the city centre is mainly known for its concert hall and cinema which together cover approximately half of the floor area of the centre. In addition, the centre has a good F&B offer. Due to this Solaris can be categorised as an entertainment centre.

### ÜLEMISTE

Ülemiste shopping centre is the biggest shopping centre in Tallinn. It is mainly focused on retail, although there is a relatively large choice of restaurants and cafes. Due to its location, the centre attracts a large proportion of customers from the Eastern part of Tallinn, and due to its size, it is well-known among all inhabitants of Tallinn. Expansion plans for the shopping centre have been announced.

### KRISTIINE

Kristiine shopping centre is situated close to the city centre and has good access by foot and many public transports methods, including train. Kristiine, also owned by Citycon, has a remarkable number of restaurants and cafes. The market positioning of the shopping centre is mass market; the centre has a good tenant mix of fashion retailers attracting local shoppers.



# TALLINN

## New Development Watch

### DEVELOPMENT TO WATCH OUT FOR

#### TALSINKI

Total Size (sqm)	86,000
- Retail and Restaurants GLA	11,297
- Grocery GLA	9,559
Planned Opening Date	2028
Consumer Profile	Located in harbour and connecting the Tallinna and Helsinki people. Residential and Commercial area. Mass market and leisure. Torists

#### ABOUT THE DEVELOPMENT

Talsinki development project is branded as the meeting point of the twin cities Tallinn and Helsinki. Talsinki is the one of the largest development projects in the heart of Tallinn. The multifunctional waterfront development, right next to US Real Estate’s current property Rotermann City Quarter. The development will also include apartments, offices and retail.





# TALLINN

## Food & Beverage

**Estonians love the food of their country but they are also willing to adopt new flavours. It is possible to find influences from Europe, Asia and America.**

There are several local and international chains located in Tallinn. These restaurants and cafes can be found in the city centre and old town, shopping centres and close to transport hubs. A newly popular area for F&B is Noblessner, where many popular restaurants are located.

\*Restaurants with Michelin stars

### **180° BY MATTHIAS DIETHER\*\***

180° was created by the two Michelin star chef Matthias Diether and his dedicated crew. The fine-dining restaurant is located in the historic Noblessner Harbour. It boasts a wonderful view of the sea, has an open kitchen, an elegant menu, and offers aesthetic pleasure in addition to an unforgettable gastronomic experience. Guests can see how the chefs prepare the food up close.

### **Restaurant Härg**

Restaurant Härg wants to offer steaks of the best quality, meat cooked at a low temperature, delicious grilled dishes, and healthy salads and fresh juices/smoothies. Located in the city centre with a cosy atmosphere, good music, stylish interior and a courtyard.

### **NOA CHEF'S HALL, MICHELIN \***

The best restaurant in the Baltics 2017, NOA Chef's Hall, is a private and elegant restaurant, which seats 45 people. Chef's Hall presents a wonderful fine dining experience at the seaside of Tallinn. They offer five to seven course tasting menus, which have been composed by Tõnis Siigur and Orm Oja using only the best ingredients in their open kitchen.

### **FOTOGRAFISKA RESTAURANT & ROOFTOP GARDEN**

Restaurant Fotografiska works on a zero-waste basis. Everything from the flower to the root or from the nose to the tail can be used – both in the kitchen and bar. The little amount that's left over is used in compost, which makes its way back to the fields and garden boxes. Located at the popular Telliskivi area, close by Tallinn Railway Station





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## Food & Beverage Market Overview

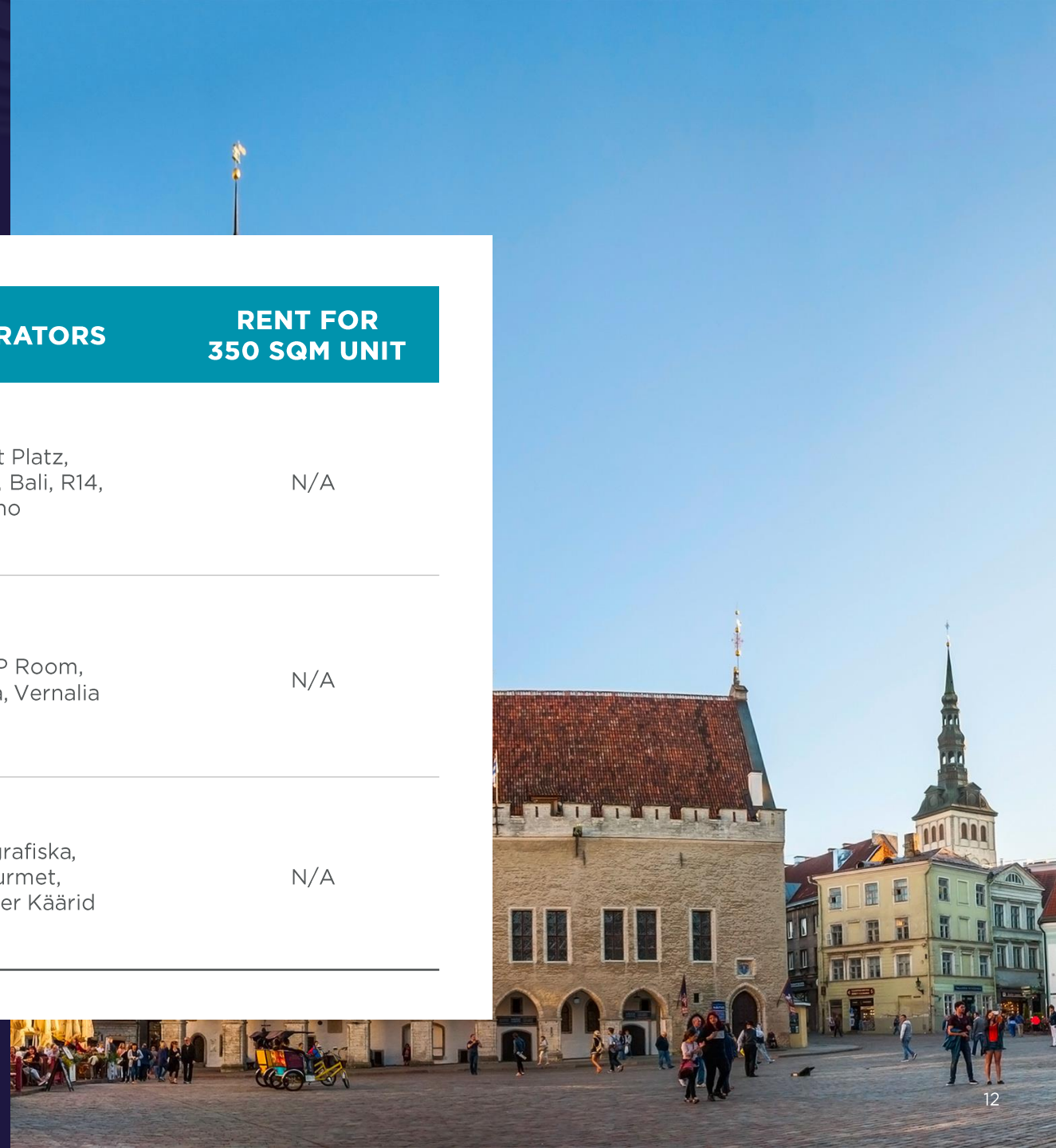
KEY AREAS	CONSUMER PROFILE	FOOD & BEVERAGE OPERATORS	RENT FOR 350 SQM UNIT
<b>Viru Centre, Solaris and downtown</b>	Tourists, local consumers	Local restaurants and McDonald's, Hesburger, Vapiano, Subway, etc. Plus other international chains.	Up to 40 €/sqm/month
<b>Old Town</b>	Tourists, local consumers	Local restaurants	Up to 40 €/sqm/month
<b>Ülemiste</b>	Local consumers	BabyBack, Chopsticks, Lido, Little India, McDonald's, Ribi, Subway	N/A
<b>Rocca al Mare SC</b>	Local consumers	Chopsticks, Da Vinci, Keb-up, Liiha & Tapas, Little India, Mack Bar-b-que, St. Patrick's	N/A
<b>Kristiine SC</b>	Local consumers	Chopsticks, Da Vinci, Brezza, Prima	N/A



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KEY AREAS	CONSUMER PROFILE	FOOD & BEVERAGE OPERATORS	RENT FOR 350 SQM UNIT
Rotremann	Tourists, local consumers	Restaurant Pull, Restaurant Platz, Taqueria, Chicago, Om.house, Bali, R14, Flamm, Stalker, Vapiano	N/A
Noblessner	Tourists, local consumers	Restaurant 180°, Põhjala TAP Room, Lore Bistroom, Proto Café, Uma, Vernalia	N/A
Telliskivi	Tourists, local consumers	Foodstudio Telliskivi, Fotografiska, French Bostro, Bueno Gourmet, Kärbes Kitchen&Bar, Kivi Paber Käärid	N/A







## AIVAR ROOSIK

Kinnisvaraekspert OÜ Agency  
& Järve 3-2

11314, Tallinn, Estonia

Mob: +372 51 03 367

Tel: +372 626 42 50

[aivar.roosik@kinnisvaraekspert.ee](mailto:aivar.roosik@kinnisvaraekspert.ee)

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