



# LogoPark - a catalyst for cross-border trade and regional integration

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# Umai Group



1. Who We Are
2. CAREC Integration Impact
3. Store Concepts and Brands
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# Who We Are - Umai Group

## Company Snapshot

**Founded:** 2002 under the “Narodnyi” brand; evolved into Umai Group in 2022.

**Scale & Reach:** Over 6,500 employees serving more than 250,000 customers daily.

**Store Network:** 153 stores (3Q 2025)

**Market Position:** ~7% share in the country’s FMCG market, making Umai Group the #1 local operator.

**Logistics Backbone:** 9 Distribution Centers totaling ~23,000 m<sup>2</sup> with a 260 trucks (multi-temperature) ensuring nationwide supply.

**Private Labels & Production:** Ten in-house brands, plus a bread factory and upcoming confectionery/culinary plants for enhanced vertical integration.

**Omnichannel Approach:** E-commerce platform (“Globus-Online”), integrations with Glovo and O!Market, and planned DarkStore e-grocery pilot to capitalize on rising online demand.

## Positioning



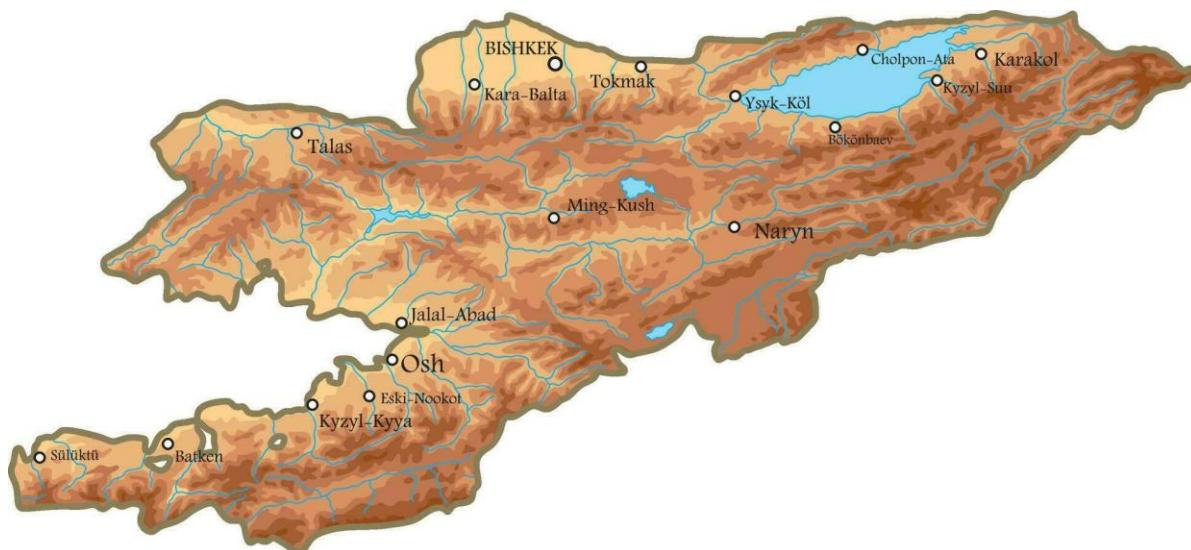
**Targeting further expansions toward 300+ stores, higher logistics centralization (~50% by 2030), and continued growth in own-production and private-label lines to drive margins.**



## CAREC Countries

-  Afghanistan
-  Azerbaijan
-  Georgia
-  Kazakhstan
-  Kyrgyzstan
-  Mongolia
-  Pakistan
-  China
-  Tajikistan
-  Turkmenistan
-  Uzbekistan

# Kyrgyzstan at a Glance



## Key Macroeconomic Indicators

Land area  
**199,951 km<sup>2</sup>**

Population  
**7.23 mln**

Nominal GDP  
**USD 20.16 bn**

Nominal GDP per capita  
**USD 2.79K**

Population Density  
**36 people/km<sup>2</sup>**

...excluding mountains  
**362 people/km<sup>2</sup>**

**Source:**  
IMF Database (Oct 2025) <https://www.imf.org/external/datamapper/profile/KGZ>

# Store Concepts and Brands

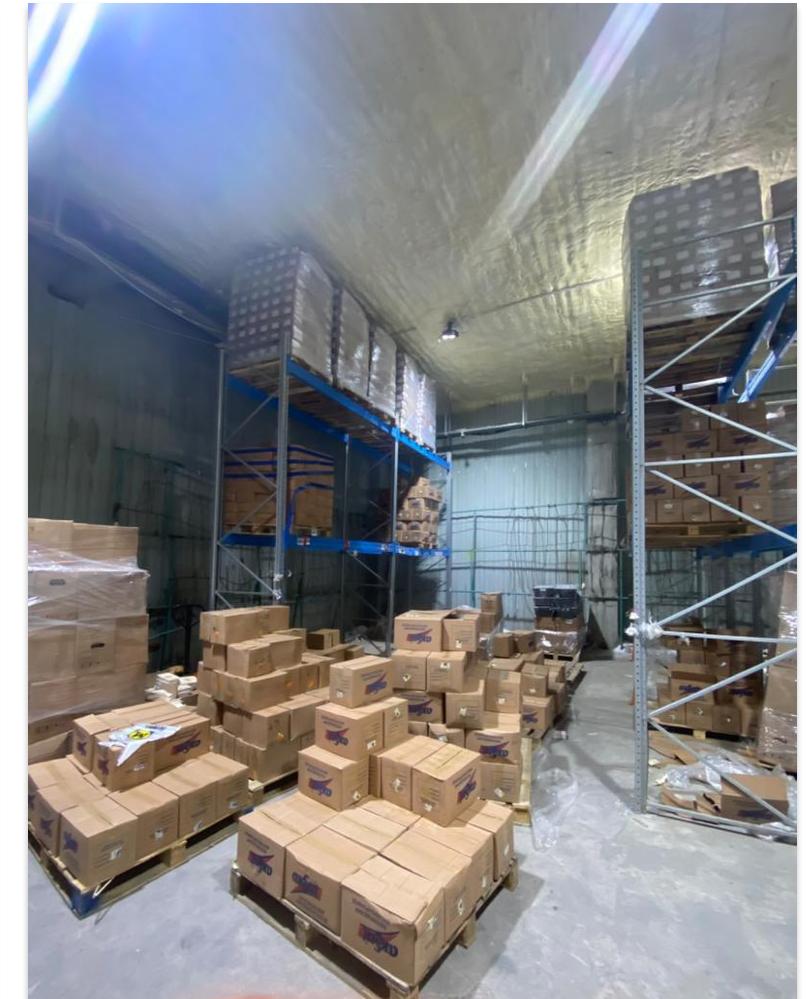


Format	Proximity store	HM / SM / Express	Hard discount stores	Proximity store-café
Key Differentiator	High quality at a convenient location	Fresh produce (FFV) & Own Production	High quality at a convenient location	Ready-to-eat meals, brand synergy with SPAR
Number of stores	24	81	38	10
Price Positioning	MID to MID+	LOW to MID	Everyday Low Price	MID to MID+
Trade area (m <sup>2</sup> )	~320	2,200 / 800 / 500	220	320
Assortment (SKUs)	7,500	20,000 / 11,000 / 8,000	1,250	6,000

# Growth Constraints

<h3>Fragmented logistics</h3> <ul style="list-style-type: none"> <li>• Fragmented, aging warehouses</li> <li>• No multi-temperature capacity</li> </ul>	<h3>High dependence on distributors</h3> <ul style="list-style-type: none"> <li>• Limited profitability due to ~ 16% margin taken on average by distributors</li> </ul>	<p>Our goal is to grow faster than the market while upholding our brands' quality standards. To do that, we must remove the primary bottleneck - our legacy logistics base - and fix chaotic in-store receiving (back-door operations) before they constrain growth.</p>
<h3>Inefficient logistics</h3> <ul style="list-style-type: none"> <li>• Duplicated staff</li> <li>• Longer delivery routes; High OPEX</li> <li>• No time-window discipline: small drops drop-offs per store daily</li> </ul>	<h3>No scalable infrastructure</h3> <ul style="list-style-type: none"> <li>• Existing leased facilities could not support future expansion</li> <li>• No central cross-dock / staging area; backrooms used as overflow storage</li> </ul>	
<h3>In-store inefficiencies</h3> <ul style="list-style-type: none"> <li>• Up to ~40 back-door deliveries per day disrupt operations</li> <li>• Rear storage eats sales floor, reducing trading area</li> <li>• Staff tied up with receiving, unloading, stocking, and reconciling invoices</li> <li>• “Door → stockroom → floor” control loop breaks down: no location control, frequent misplacements, slow replenishment</li> <li>• High OOS &amp; Shrink risk</li> </ul>	<h3>Zero vacancy in modern WHs</h3> <ul style="list-style-type: none"> <li>• Impossible to lease suitable space in Kyrgyzstan</li> </ul>	

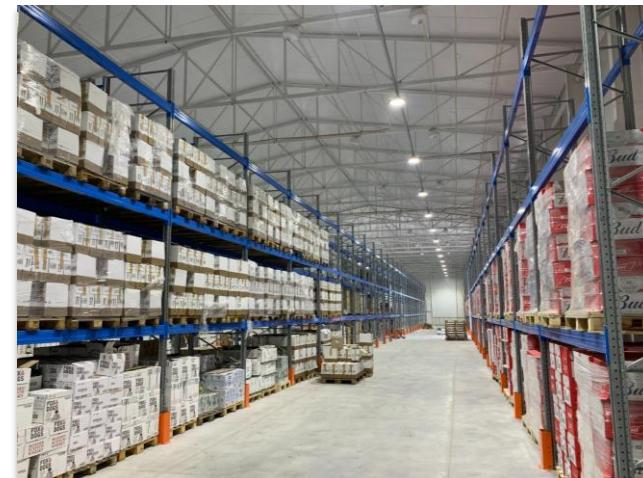
# Existing Cold Storage Facilities (1/2)



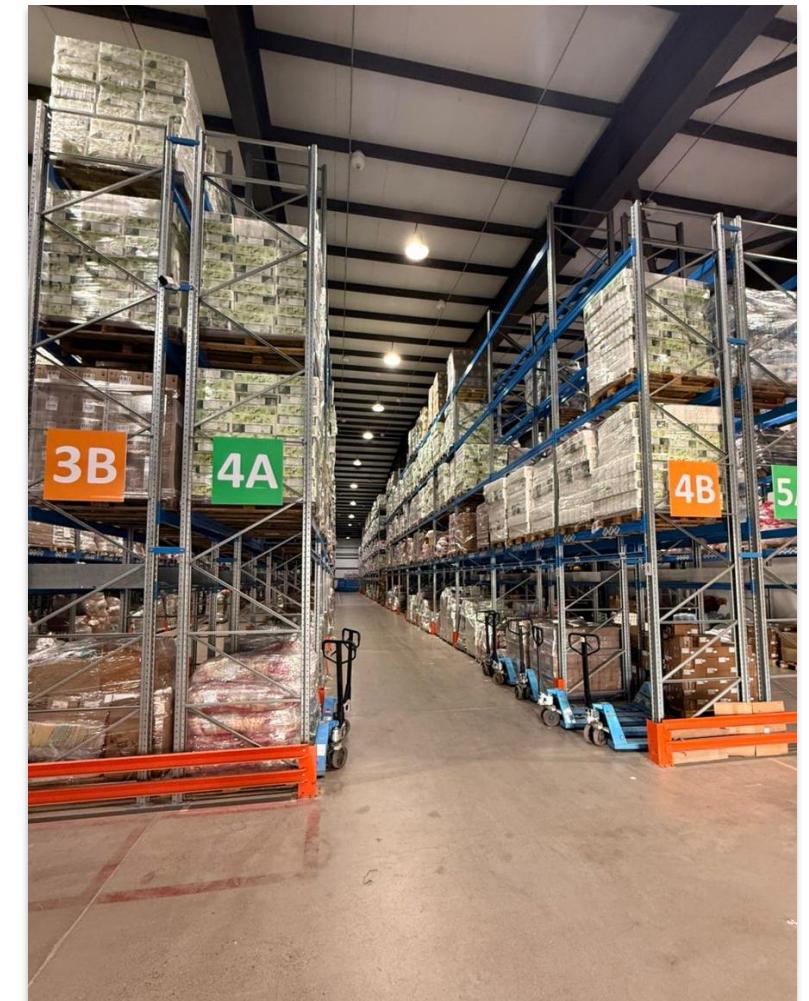
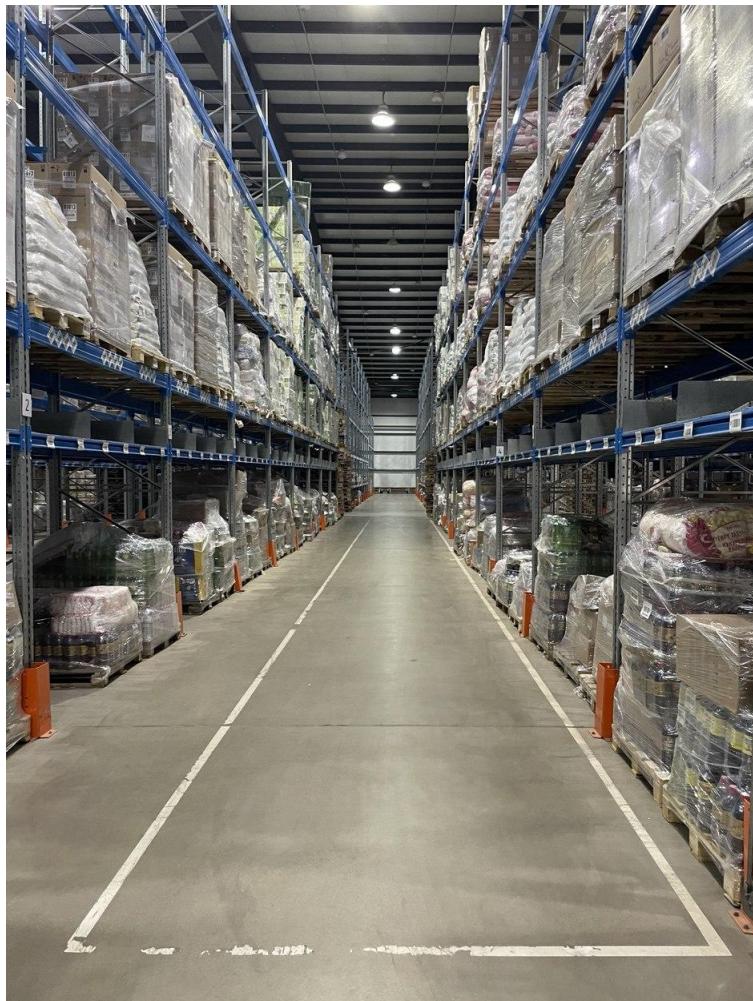
## Existing Cold Storage Facilities (2/2)



# Reconstruction Undertaken - Old Facilities Were Unusable



# Newly Leased Dry - Storage Warehouse



# Project LogoPark

## Key project snapshots

Construction of a Phase 1 multi-temperature DC to consolidate all warehouse operations and serve as the principal distribution center for Umai Group.

<b>Location</b>	Sokuluk District, near Bishkek, Kyrgyz Republic
<b>Phase 1 Facility</b>	DC (26,990 sq.m. with mezzanine), rail spur, utilities and auxiliary infrastructure
<b>Land Area</b>	40.7 ha
<b>Future Expansion</b>	Phase 2&3 (~42,000 sq.m.)
<b>Phase 1 Investments</b>	USD ~30 mln
<b>Timeline</b>	Q1 2026 - Q2 2027
<b>Strategic Impact</b>	<ul style="list-style-type: none"> <li>Centralization of up to ~50% of volumes by 2030</li> <li>First modern DC in Kyrgyzstan with -25°C to +25°C chambers</li> </ul>
<b>Project Partners</b>	 

## Location



The land plot is located 11 km from the city center, offering the following advantages:

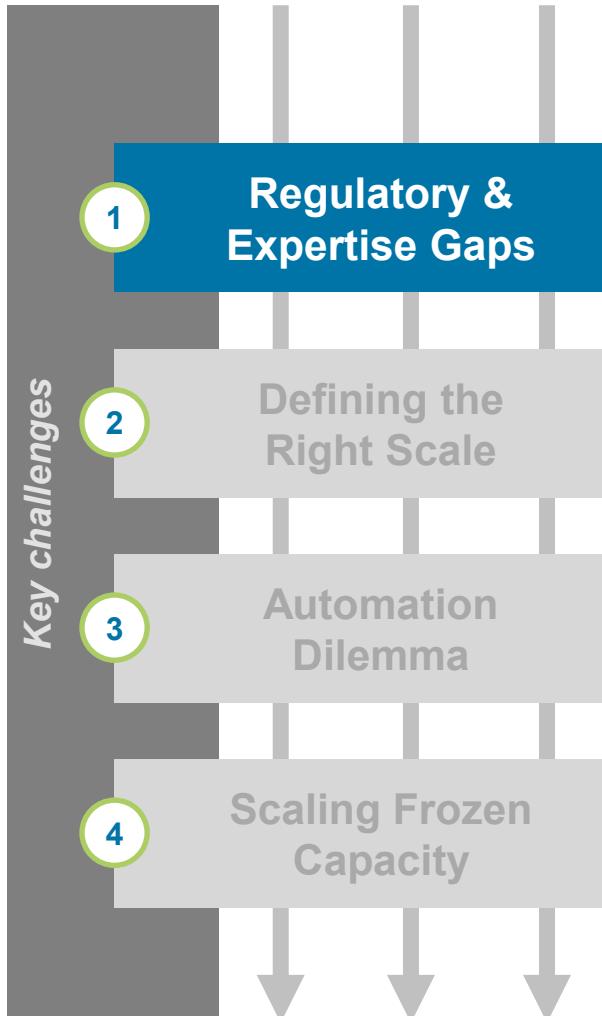
- Convenient access to the highway and railway network**
- Opportunity to connect to existing engineering utilities of the neighboring factory**



# What Challenges we faced?

1. Regulatory and Expertise Gaps
2. Defining the Right Scale
3. Automation Dilemma
4. Scaling Frozen Capacity
5. Meeting Green Standards
6. Managing E&S Impact
7. Securing Financing

# Can Regulation Unlock Global Standards?



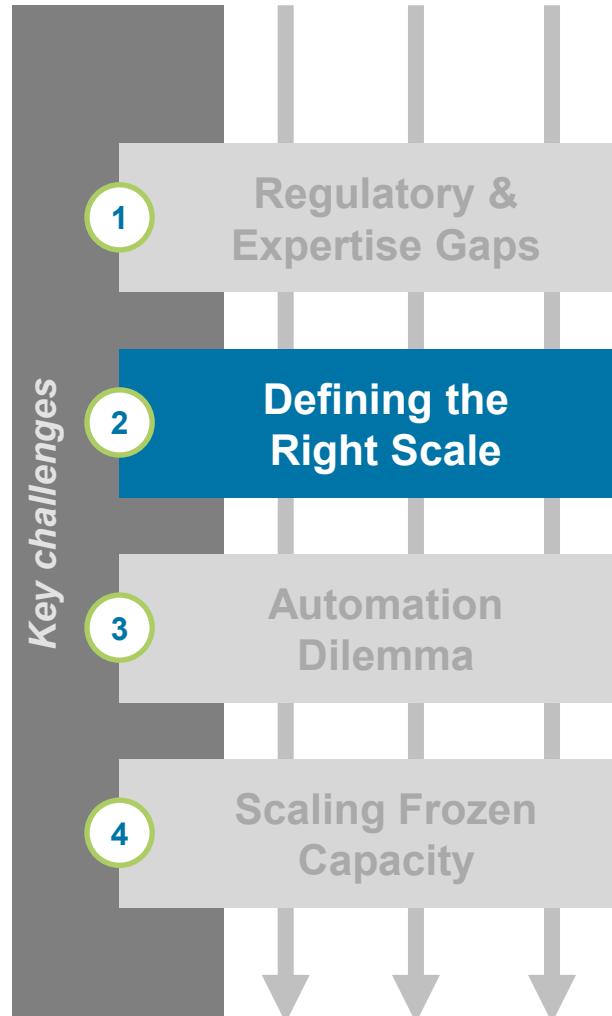
## Challenge:

1. **Old regulation** forced duplication of design, extra costs, timeline delays, and higher risks of errors.
2. **No local expertise** in multi-temperature DCs

## Solution:

- Agreed with government to apply **New regulation enabling international standards without requiring adaptation** by local institutes.
- **SIMEE (Shanghai Institute of Mechanical and Electrical Engineering)** selected after international tender as design partner, bringing knowledge of best practices in automation, multimodality, and sustainability.

# How big should the warehouse be?

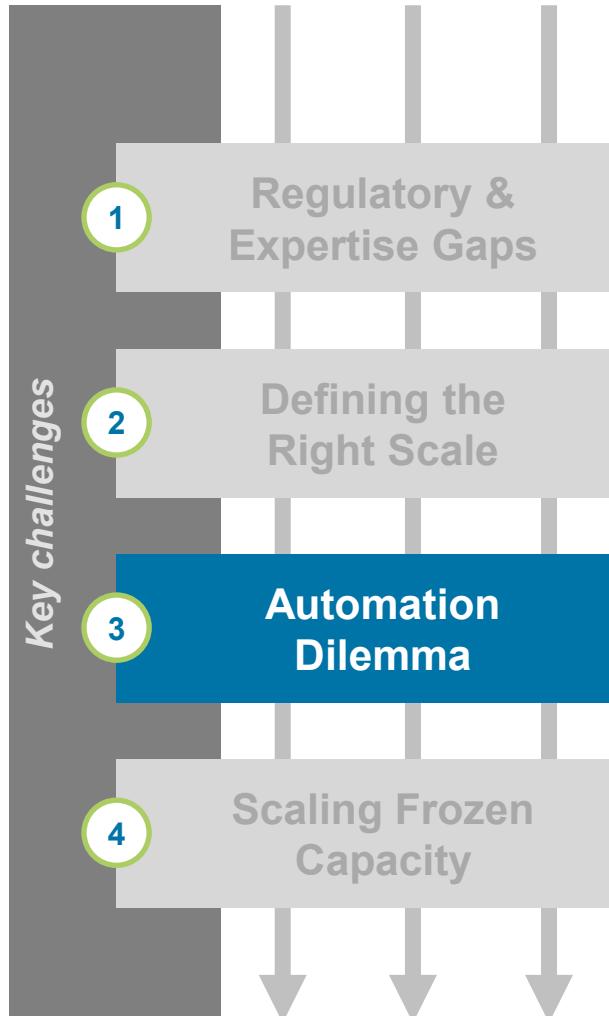


## Challenge:

- 1. No benchmarks in the market**
- 2. Needed 5-7 year capacity forecast**
- 3. Site constraints** limited design options (gas pipeline from neighboring facility, power lines, construction of the private rail spur)
- 4. Risk of underbuilding vs. overinvestment**

## Solution:

- Retrospective analysis of goods inflow and outflow of 9 DCs** (by categories, weights and dimensions characteristics and volume)
- Analysis of transport characteristics**
- Design of projected goods and stock flows** taking into account growth perspective in the future 5-7 years
- Calculated optimal warehouse space (m<sup>2</sup>) and workforce**
- Masterplan: Phase 1 (26,990 m<sup>2</sup>) + scalable Phases 2&3



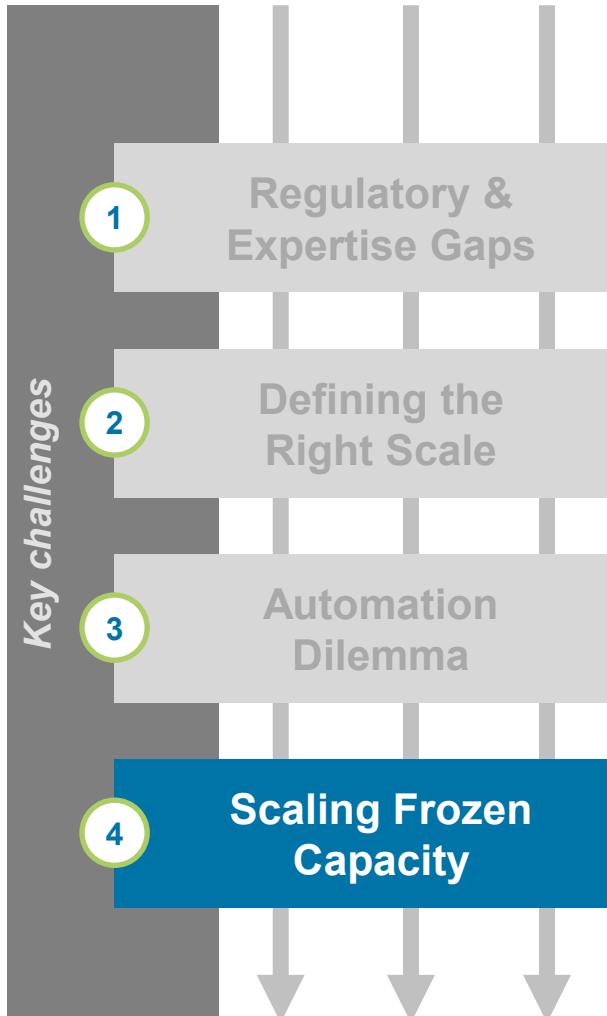
## Challenge:

1. Full automation considered for Phase 1
2. Costs too high vs. immediate benefits
3. Risk of overinvestment in unneeded tech

## Solution:

- **Phased automation:** starting with WMS, electric reach trucks, forklift & bicycle charging stations in Phase 1
- **Future phases:** As volumes scale, robotics, shuttles, conveyors will be implemented

# What if tomorrow demands double the freezer space?



## Challenge:

1. Growing demand may require **larger frozen storage** in the future
2. Expansion should be possible without costly reconstruction or downtime

## Solution:

- **Phase 1:** 11,000 m<sup>2</sup> reserved for cold & frozen storage
- **Flexibility to double freezer capacity seamlessly as frozen product volumes grow through optimized structural design:** Floor and foundations engineered for future scalability of frozen storage to up to 11,000 m<sup>2</sup> into chilled zone without extra heavy CAPEX

# EDGE Certification

*Design and Certify Green Buildings in alignment with international standards*



**Excellence in Design for Greater Efficiency**



**Green  
Building  
Certification  
System**

## Resource Efficiency



Energy



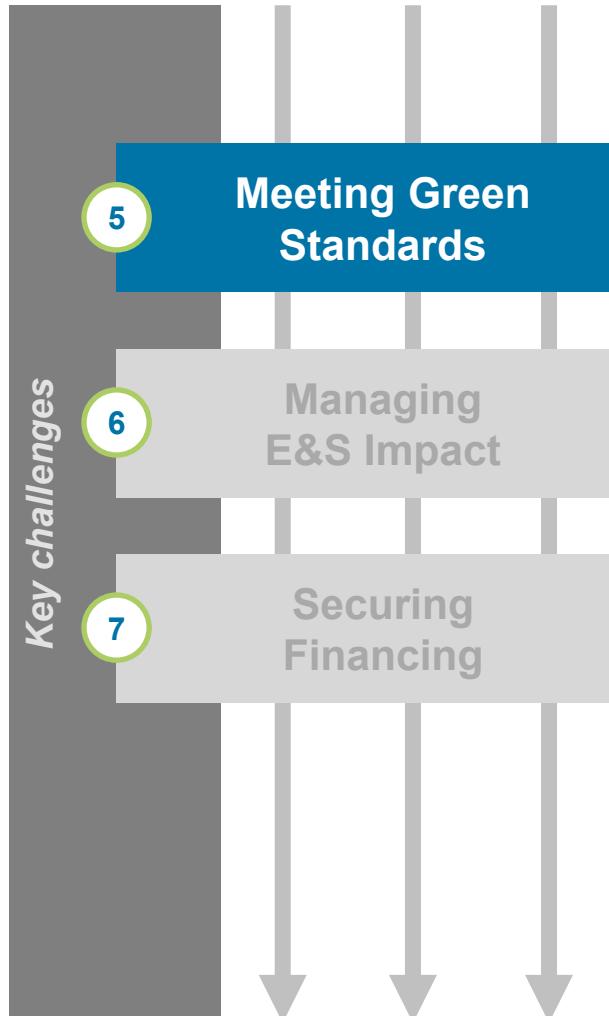
Water



Embodied Carbon in materials

EDGE is an IFC green building certification that drives 20% savings in energy, water, and materials for sustainable, efficient design.

# Green Compliance: Ambition or Reality?



## Challenge:

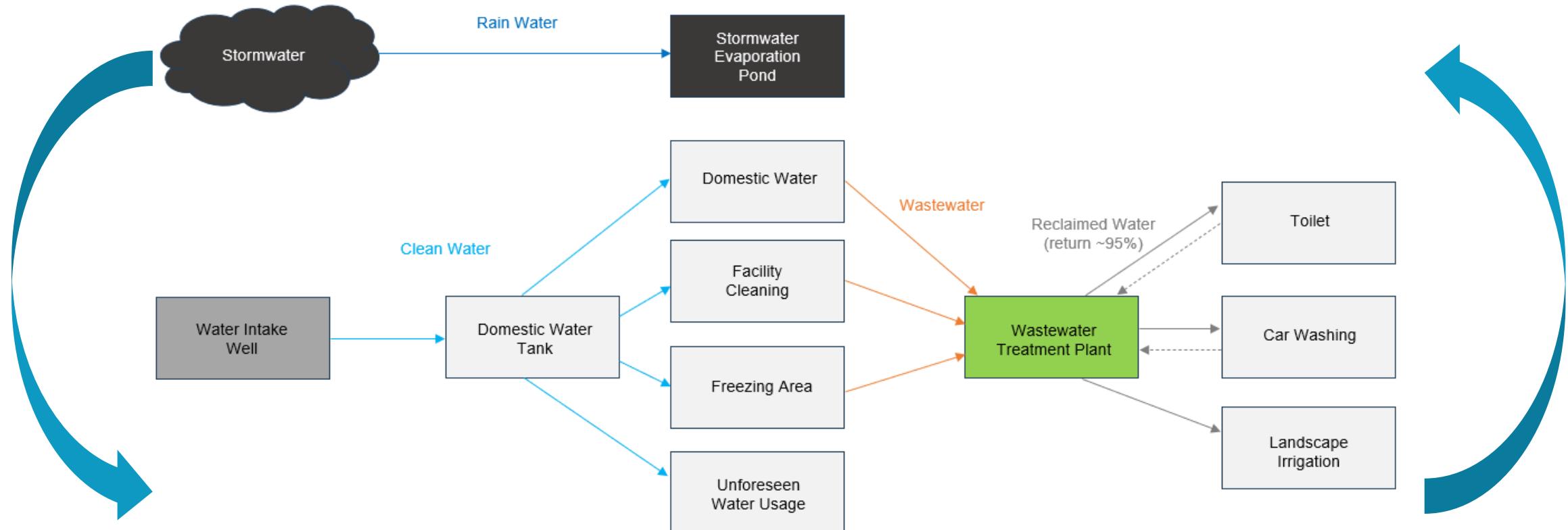
1. Adhering to green standards is the norm in international practice
2. In Kyrgyzstan, almost no projects meet sustainability standards
3. High upfront CAPEX for green technologies often conflicts with financial feasibility.

## Solution:

- **EDGE Certification:** the project is designed to meet international sustainability benchmarks
- **Water management:** on-site wastewater treatment with reuse for technical needs (car washing, landscape irrigation)  
Stormwater is managed separately via a pond for collection and evaporation
- **Energy efficiency:** optimized building envelope + solar panels-ready roof
- **Cooling systems:** eco-friendly cascade **R1234YF + CO<sub>2</sub> (R744)**
- **Materials:** EDGE principles → ≥20% savings in energy, water, materials

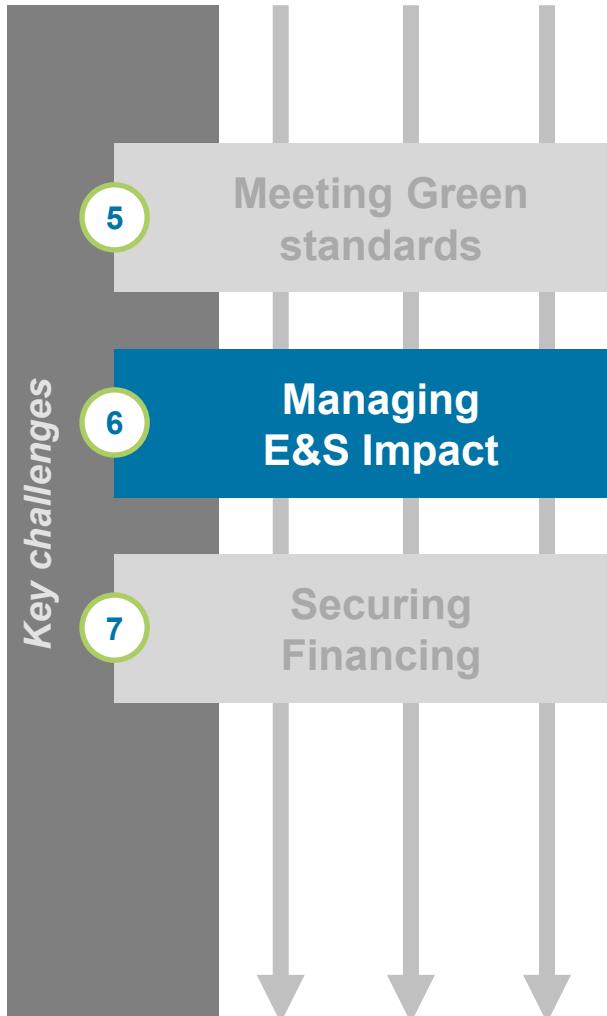
# Smart Water Supply: On-site Treatment

The project integrates on-site wastewater treatment with direct reuse for technical needs such as car washing and irrigation.



The system ensures on-site wastewater treatment with reuse for technical purposes, reducing fresh water demand and operating costs.

# How to Balance Development with Social Responsibility?



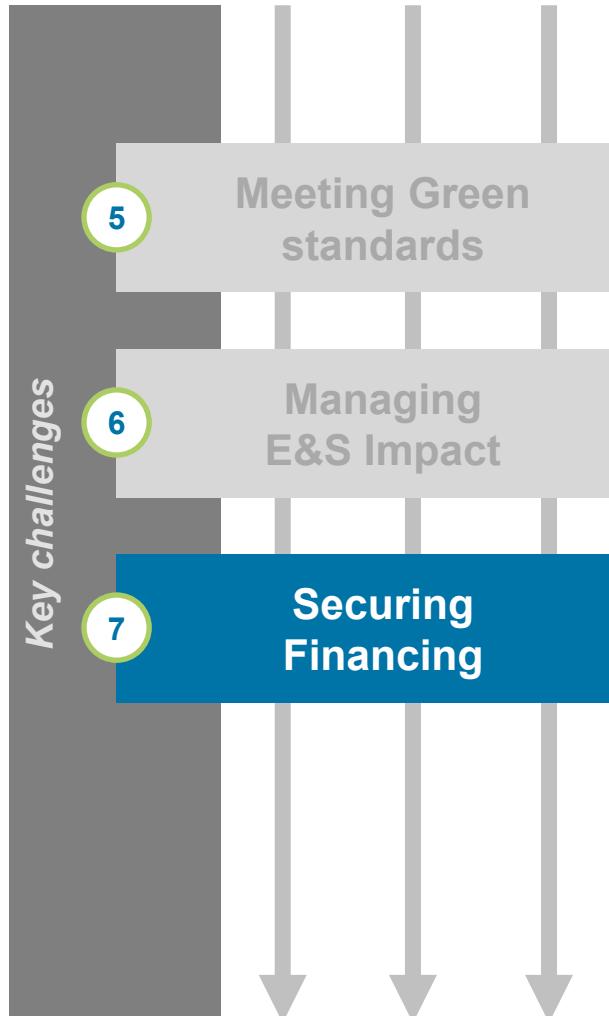
## Challenge:

- A project of this scale inevitably affects **land, communities, biodiversity, and safety**
- Requires a **structured and internationally recognized approach** to identify and mitigate risks

## Solution:

- A **comprehensive ESIA (Environmental & Social Impact Assessment)** will be carried out, covering 8 key areas: risk management, labor, resources, health & safety, land use, biodiversity, indigenous peoples, cultural heritage
- **Mitigation measures** will be designed to address both **city-level and district-level impacts**
- This process will ensure alignment with **international standards**, building trust with communities and investors

# How to secure financing?



## Challenge:

- **Large upfront CAPEX required** for modern DC (USD ~30 mln)
- **Financing structure with international lenders** is complex and costly
- **Needed to prove financial attractiveness** vs. 9 fragmented DCs

## Solution:

- **Phased construction** to reduce upfront risk
- **Solid financial model** to meet lender requirements
- Demonstrated **strong efficiency gains**:
  - Capture distributor margins (+2.5%)
  - Lower logistics costs (-2.1%)
  - Improved sales through higher service level (+1.5%)



# Project Implementation

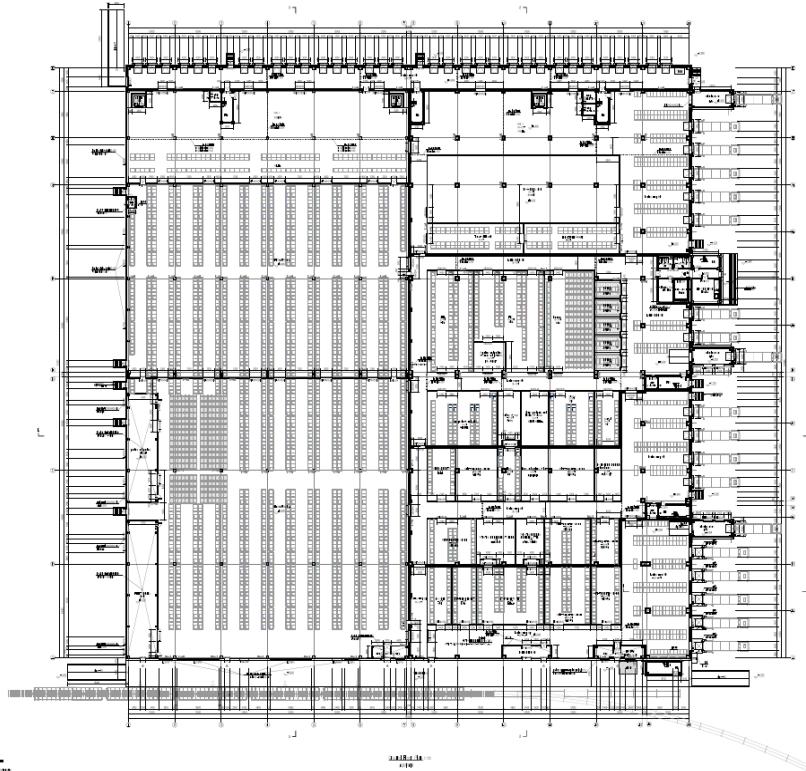
1. Master Plan for new Distribution Center (DC)
2. Storage and Functional Areas of the new DC
3. 3D Render of the new DC

# Master Plan for new Distribution Center (DC)

- **International Consultants**  
CCL were involved in the conceptual design of master plan and warehouse.
- The **structural and architectural design** was completed by **Shanghai Institute of Mechanical and Electrical engineering (SIMEE)**.
- **Phase 1 includes** the construction of a **26,990 m<sup>2</sup> warehouse** (floor area) **with supporting infrastructure** (Repair shop, car washing facility, recycling warehouse, and other auxiliary buildings).



# Storage and Functional Areas of the new DC



- **Optimized technological flow of products was developed in close consultation with experts**, ensuring compliance with international retail standards.
- Warehouse will **include chambers for dry goods, bulk products, as well as fresh and frozen items and mezzanine floors for offices**.

## 3D Render of the new DC (1/2)



## 3D Render of the new DC (2/2)



# Building the future of modern retail in Kyrgyzstan

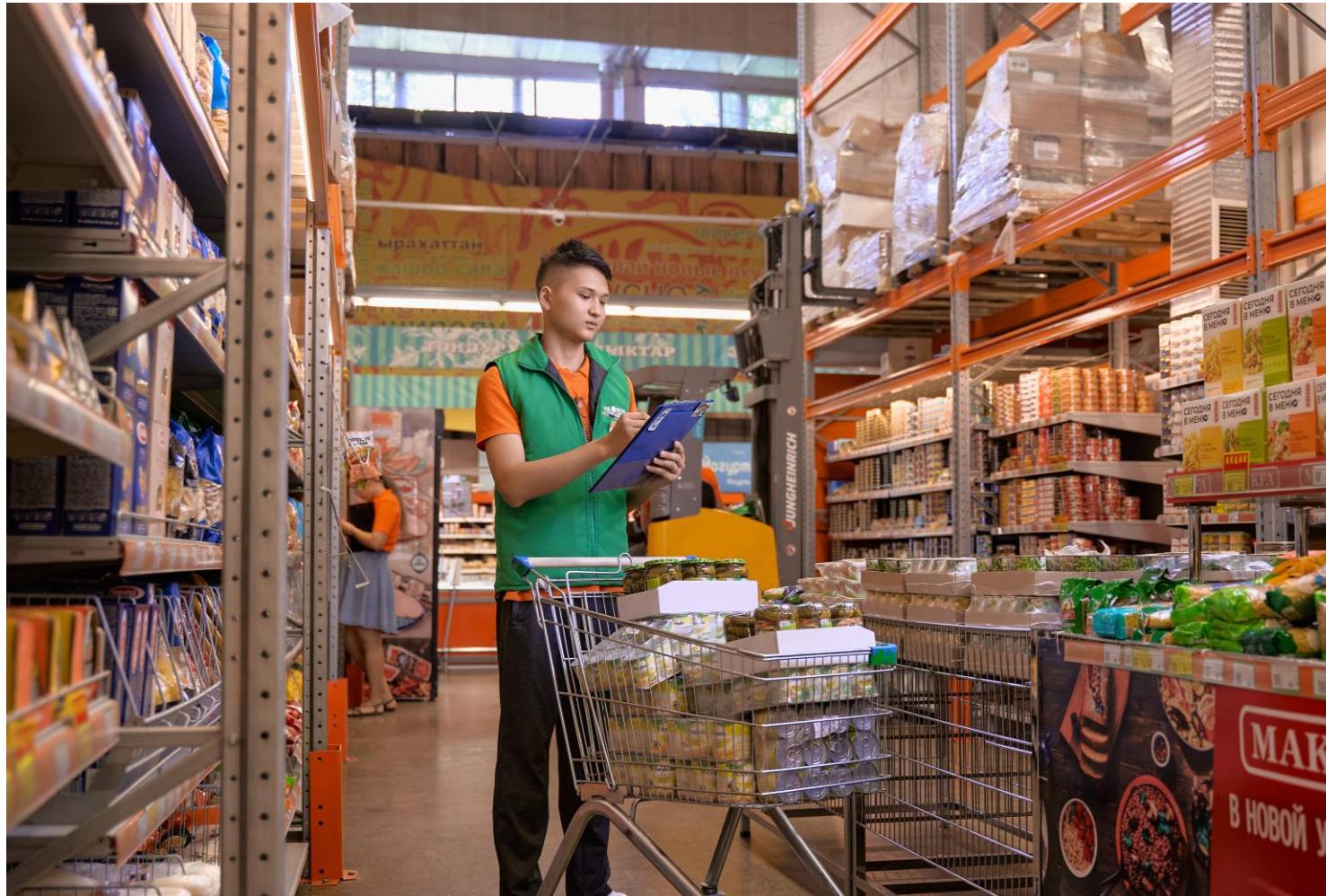
1. Supply Chain Excellence
2. Assortment & Customer Experience
3. Operational Efficiency
4. Scale & Growth





## Supply Chain Excellence

- Reliable deliveries with strict temperature control
- Freshness and food safety guaranteed across all Umai Group's formats.
- Centralized stock management → faster replenishment and fewer out-of-stocks.



## Assortment & Customer Experience

- **Wider SKU range available** in one pallet delivery → more variety in stores.
- **Support for specialized categories** (fresh, frozen, ready-to-eat).
- **Consistent quality standards across the network** → enhanced customer trust.



## Operational Efficiency

- **Reduced transport costs** through centralized logistics.
- **Lower energy & utility costs** via EDGE-certified infrastructure.
- **Automation-ready warehouse management systems (WMS).**

# Building the future of modern retail in Kyrgyzstan with SPAR



## Scale & Growth

- **Umai Group positioned as the most modern retail chain in Kyrgyzstan.**
- **Stronger competitive advantage vs. informal trade.**