

PPK Malaysia
Malaysia Shopping Malls Association

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NewsNetwork

Food for Thought

Features

**F&Bs the new anchors
Technology shake up in F&B**

**Watch Out in 2018
Certification Courses
Study Trips**

PRESIDENT'S MESSAGE

Dear members,

Even as you read this newsletter, we would be well into the second quarter of the year of the canine. With all the headline numbers pointing towards a positive year, we are cautiously optimistic that we will enjoy a bull of a dog!

All said, the road ahead is still fraught with challenges. The headwind arises mainly from a combination of macro-economic factors and some longer-term impact resulting from the regulatory compliance imposed in 2015.

While there will be some who would be apprehensive about more new malls joining the fray, into what is already perceived to be an over built position, it is essential that existing mall operators must reinvigorate and continue to reinvent themselves to stay relevant and prosper.

While the short to medium terms do look particularly tough, the longer-term prospect remains intact. The headline economic numbers look promising as the government is expected to plough back the revenue collected, some of which will take some time to flow through to the system.

For this, we urge the government to look into ways in which the public spending has the greatest of economic multiplier effect to benefit the rakyat and hence, raise their discretionary income so that the people will enjoy a greater level of goods and services. This is perhaps the mother of all wishes for the retail industry, that the record revenue collections by the government would be used to drive our country's economy to a new level.

On our end, malls will have to take cognisance of the new reality in the market place. In the shorter term, we will expect to see more consolidation among retailers. We will see retail chains rationalising their positions to preserve capital and cash flow in anticipation of a softer market.

For malls, they need to be aware of the shopping trends that have certainly changed and malls' merchandise mix will need to adjust. In particular, food and beverage, entertainment and leisure businesses have increased their share of net lettable area from the traditional 10% up to 30% in some malls. As one prominent industry player states succinctly, "we now brand themselves more as **malls**, rather than mere shopping malls". This is certainly food for thought in more ways than one, which is fittingly the thread running through this edition of the newsletter. As online retail transactions continue to grow, albeit at a slower pace in Malaysia compared to regionally, and clicks co-exist with bricks, there is simply no substitute for the sheer experience



of enjoying and being served food in a restaurant.

PPKM recently organised a Think Tank Lab (TTL) where some of the malls' eminent players were invited to share their views on current industry trends and challenges. It was unanimously acknowledged that there was a need for the centralised collation and collaboration in the way we collect and manage data and statistics among the public and private agencies. This is to ensure that decisions made are based on reliable and timely data. Towards this end, PPKM will continue to develop and update industry surveys this year and we seek closer cooperation among our members to furnish pertinent data. In an era of big data, statistics and information are always key to make sound and informed decisions. Industry benchmarks are invaluable guides towards efficiency and productivity.

We have also recently settled two long outstanding issues on music royalty copyrights and property management regulations. Firstly, we have worked closely with Music Rights Malaysia for members to pay preferential rates and will continue to develop more streamlined processes. Secondly, personnel undertaking property management, including malls, are now required to register with the Board of Valuers, Appraisers, Estate Agents and Property Managers. We encourage and urge all qualified mall personnel to submit their registrations within the window period from now until 31 December 2018.

Do continue with your passion for malls and we shall surely overcome any difficulties that may come along!

Warmest regards,

TAN SRI DATUK EDDY CHEN
President



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PPK MALAYSIA (Malaysia Shopping Malls Association)
A608, 6th Floor, Block A (Lobby No. 2), No. 1, Jalan SS20/27, Damansara Intan, 47400 Petaling Jaya, Malaysia
Tel: 603 - 7727 6202/6232 Fax: 603 - 7727 6203
Email: secretariat@ppkm.org.my URL: ppkm.org.my

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Chameleon Creative Print Sdn Bhd (1124452-V)
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Looking at oversupply of malls objectively

- Issue of oversupplying retail space should not be solely interpreted from the macro-scale perspective
- The average occupancy rates are 85.2% and 86.2% for KL and Selangor respectively



Guest writer
by **Eddy Chen**

WITH over 600 existing shopping malls and more in the pipeline, especially in Johor where total retail space will be at least 50% more by end-2018, the outlook at first glance may look gloomy.

There is no doubt that some developers may have been overly enthusiastic in capitalising on shopping malls, but the issue of oversupplying retail space should not be solely interpreted from the macro-scale perspective.

In fact, when zooming down into the micro-scale level, such as the sub-district level, one may find there are areas within the Klang Valley region which are either overdeveloped or under-served in the provision of retail centres.

For example, in the Kajang/Cheras area, the retail space per capita is as low as 2.8 sq ft, which is far below the national figure of 4.9 sq ft.

Other places with moderately low retail space per capita include Semenyih (5.3 sq ft); Puchong (5.4 sq ft); and Rawang (5.5 sq ft).

Low shopping mall density along with high population density as well as high consumer spending growth point to the strong development potential in these areas (See table).

On the reverse side of the picture, there are, of course, places with relatively higher retail space per capita, such as Shah Alam (9.2 sq ft); Damansara (8 sq ft); Subang Jaya (7.1 sq ft); and Bandar Kuala Lumpur (7.6 sq ft).

While it is unfair to make a sweeping statement to say that there are too many shopping malls in Malaysia, there is no denying that there are challenges.

Malls must ride on the opportunities to transform to meet lifestyle changes that come with this new revolution. Industry practices will have to adapt to these changes which is growing at a seemingly exponential rate for malls to meet new needs.

Occupancy rate

The number of malls notwithstanding, there has been some concerns over the occupancy rate of shopping malls, especially in the Klang Valley region, Johor, and Penang.

However, past records have shown that the occupancy rates of shopping malls are rather consistent, and for those located in Kuala Lumpur and Selangor, their performances are even better despite the ample number of incoming supplies and competition.

The average occupancy rates were both 85.2% and 86.2% for Kuala Lumpur and Selangor, respectively, between 2010 and 2017, which have been more stable than other states.

Nevertheless, the concern on glut should not be overlooked. Strategic planning and proactive management are key factors to the success of shopping malls, especially in this challenging market climate.

The mall and retail business are highly dynamic and interactive in nature, and temporarily freezing the issuance of licences



Shoppers entering the Pavilion Shopping Mall in Kuala Lumpur. Malls in KL and Selangor have generally performed well despite the ample incoming supply and competition

for new shopping malls, just for the sake of curbing the oversupply of retail space flooding the market, may not be a sustainable solution.

Instead, it is vital for any future development to be built on a foundation of meticulous market research, to ensure the type, form, scale, and profile of retailing that matches the requirements, habits, preferences, and affordability of the primary target market in the specific locality.

A successful shopping mall requires a matured and strategic location with a large population catchment area. Therefore, more attention should be paid on how to attract more shoppers and cultivate a loyal clientele, because opportunities always exist for those who are able to adapt to consumption trends, stemming from the needs of the market, the evolving infrastructure, changes in patterns of consumption and lifestyle of consumers.

At the end of the day, the prospects for well-positioned and well-managed retail malls remain bright, while the poorer one will struggle.

Like every industry, the performance of the mall and retail industry is directly impacted by

the country's economy. When the economy is good, consumers will buy more, and likewise, consumers will stay cautious when our economic outlook remains weak.

Therefore, a robust national economy will certainly help to energise the retail industry. To-date, retail sales were reported at RM113.47 bil in September.

This records not only an increase from the previous number of RM111.76 bil for June, but also reached an all-time high of retail sales since it marked the lowest record of RM57.48 bil in March 2010.

Growing affluence

Other major trends that would help boost the retail industry are the increase in affluent urban population and the tourist traffic.

The growing affluence of Malaysians is evidenced by the obvious changing patterns of household spending on basic necessities (comprising of essential categories, such as food consumption at home, clothing, rent, and utilities) and expenditure on discretionary items (such as restaurants and hotels, communication as well as recreation and culture).

The share of expenditure on

discretionary items has increased relative to spending on basic necessities.

When the information on consumption patterns are cross-checked with the locations of existent shopping malls, one may find that the Klang Valley has the highest pool of affluent urban population and about 44% of Malaysia's shopping malls are located in this region.

This is why the future of the retail industry, especially in highly urbanised areas, is promising. Furthermore, in tandem with the development of the country's tourism industry, Malaysia has been branded as one of the Asia's top shopping destinations, alongside Singapore.

Merchandise mix

Shopping malls' relevancy and connectivity to consumers is important as it determines whether a mall will thrive or become obsolete.

Visit most of the shopping malls today and one will notice an increasing number of businesses that incorporate value-added elements attempting to drive foot traffic, such as sky parks, concerts, arts centres, spas, fitness clubs, and movie theatres.

Regional malls in Malaysia are usually fashion-oriented with the average trade mix of fashion 40% and food & beverage (F&B) up to 30%. There may be online shopping for merchandise but not for the F&B experience, so it is essential to integrate retail with other components so as to be sensitive to market demands.

Malls in the future will become increasingly people-centric, whereby shoppers can socialise with an essential host of amenities which are more exclusive and customisable that can never be satisfied online.

Realising that e-commerce activities continue to grow and increase, shopping malls in future are more likely to become a distributing channel whereby people can apply the techniques of master craftsmen to experiment, develop, manufacture and commercialise their products.

No longer are malls primarily about shopping, but shifting the function of stores towards the provision of a platform for empowering shoppers.

In view of the existence of a digital population with more than 20 million people, and the potential growth of the country's e-commerce industry, shopping malls should extend their relationships with customers through compelling content and creating deeper bonds with them.

In the face of the current and future considerable challenges, shopping malls need to seek for opportunities to stay relevant, drive growth, and boost efficiency.

Malaysian shopping malls have progressed from local to global in an outstanding feat since more than three decades ago but we always need to relook, rethink, and reconsider continuous enhancement of the shopping experience. **FocusM**

Tan Sri Eddy Chen is the president of Malaysia Shopping Malls Association (PPK)

Retail space per capita for selected towns in the Klang Valley region

DISTRICT	TOWN	POPULATION	RETAIL SPACE (SQFT)	RETAIL SPACE PER CAPITA
Hulu Langat	Kajang/Cheras	708,200	1,995,446	2.8
	Semenyih	92,491	493,805	5.3
	Ampang	356,300	2,449,629	6.9
Petaling	Petaling Jaya	520,698	2,713,022	5.2
	Sungai Buloh	575,800	224,739	0.4
	Shah Alam	481,654	4,439,176	9.2
	Subang Jaya	708,296	5,054,667	7.1
	Seri Kembangan	150,000	1,164,213	7.8
	Damansara	555,700	4,473,104	8.0
	Puchong	400,000	2,168,906	5.4
	Klang	879,867	5,801,134	6.6
Gombak	Rawang	120,447	666,296	5.5
Kuala Lumpur	Mukim Kuala Lumpur	406,500	991,323	2.4
	Mukim Petaling	359,700	1,597,687	4.4
	Mukim Setapak	334,700	2,676,241	8.0
	Mukim Batu	383,200	2,746,002	7.2
	Mukim Ampang/Ulu Klang	79,300	487,486	6.1
	Bandar Kuala Lumpur	286,700	20,513,551	71.6

Source: DOS, NAPIC

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Today, food and beverage outlets at shopping malls have become venues for social and economic interaction



F&Bs the new anchor tenants at malls

- **Consumer** behaviour studies point to the need to socialise and be experiential, making F&B outlets no more just an add-on
- **Increasing** the number of F&B outlets is a costly affair as one has to plan, design, develop and manage the mall for stakeholders



Guest writer
by **Anthony Dylan**

EXPERTS say the food and beverage (F&B) component in the tenant mix of shopping malls has reached 30% of the net lettable area.

However, raising the percentage of F&B outlets must be carefully thought through as it is a costly exercise.

The tenant mix of shopping malls today is vastly different from what one would have previously grown accustomed to.

In the late 1980s, shopping malls targeted consumers who yearned for a comfortable yet convenient place to shop.

Brands were mainly highly regarded local names or those unique to shopping malls.

F&B offerings were merely an add-on to the mix of predominantly fashion, daily goods, and services.

At the time, restaurants and snack shops were few and would only make up just 10% of the retail space.

Fast forward to this year, and you find shopping mall experts saying that the F&B component

has reached 30%.

Many say this is due to the experiential effect demanded by hard-to-please consumers who are now called customers and guests.

Some within the shopping mall and retail industry claim the F&B mix may even reach 40%.

This, they claim is possible as the sector has strong growth in franchised or licensed openings and independent, homegrown, or regional brands.

Tenant mix

Everyone seems to believe that the key to making a shopping mall attractive is to have a tenant mix that can adapt with the times.

Some claim customers have a need to socialise and be experiential. This comes in the face of technological advancements in studying consumer behaviour.

Based on global reports, Singapore has shopping malls where F&B outlets are over 30% and reaching 40% of the net lettable area, and that the category is a must and no more discretionary.

In Europe, the figure is about 13-15%, while in the Middle East and Hong Kong, it is as much as 25%. The reports show a strong upward trend.

In Malaysia, if you look at the once-in-five-years statistics of

household expenditure in 2014, one would find that restaurants and hotels take up to 13% of the monthly household expenditure.

Food and non-alcoholic beverages take up to 19% while alcoholic beverages and tobacco account for 3.5%.

Together, it seems that up to 35.5% goes into something to eat, drink or smoke, apart from other incidental expenses at hotels.

Changing the tenancy mix provides a unique challenge to shopping malls. In the context of an existing shopping mall, the main issues would be the requirements of mechanical and electrical (M&E) provisions.

Most existing shopping malls

have had their load calculations done during the early years of construction. They would not have anticipated a huge increase in F&B operators.

Acceptable percentage

The concern is on the availability of power supply, possible routings for waste pipes, incoming water, water tanks in case of supply disruption and exhaust and fresh air requirements.

New shopping malls may have an advantage in designing placements and layout, but they need to cap the percentage to an acceptable level. And what will it be?

It is hard to determine an exact percentage, but many have advised against creating a giant food court. The key is to have just enough to ensure that variety and pricing are kept affordable for the target demographics being served.

As new shopping malls are typically more expensive to build, the yield or capitalisation becomes another challenge.

F&B tenants pay much less than fashion tenants. Large homeware stores, cinemas, gymnasiums and department stores are likely to be the others in

commercial structures that take up large spaces.

Having M&E and structural requirements to house more F&B tenants will add to the cost of a new shopping mall or the retrofitting costs of an existing one.

Nonetheless, the investments are made in the belief that such tenants will be the next anchor.

Yet, the belief is a double-edged sword as the typical consumer, customer or guest has only one stomach.

He will carefully choose what to eat in a shopping mall. The abundance of F&B which look the same, albeit with different branding, don't not help much.

What is required is the understanding of which F&B outlets create the biggest impact to act as a collective anchor.

Costly affair

Long ago, food courts were a must have anchor. The phenomenon became less obvious in the 2000s as many did not do well due to pricing and variety.

Most food courts then were extremely large, with some taking up to 40,000 sq ft. Today, they are between 15,000 and 25,000 sq ft with 12-20 stalls offering distinctive food.

It is important to understand that the tenant mix in a shopping mall revolves around the merchandising mix. This defines variety, while the tenant mix defines the best operators for each of the latter's categories.

The sudden buzz around increasing F&B percentages at shopping malls is a costly affair as you have to plan, design, develop and ultimately manage the mall for stakeholders.

Understanding the community that the mall serves is also vital. One must not start designing a giant food court but look further than the tenant mix.

Consider the merchandising mix, and professional management and marketing as investments in branding.

It is important to provide the right ambience as well. Ample car parks and interactive social and communal spaces drive more footfall and grows sales.

Today, a shopping mall is a venue for social and economic interaction. It is not just a place for commerce, but a hospitable and communal space. Happy people make happy customers!

FocusM

Anthony Dylan is a member of the Shopping Mall Association Malaysia (PPK)

"What is required is the understanding of which F&B outlets create the biggest impact to act as a collective anchor."

Tropicana City Mall added an extension of four double-storey lots on a vacant lot on their property last year. It is one of the ways malls have expanded their F&B offerings



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FUTURE OUTLOOK FOR F&B OUTLETS WITHIN SHOPPING MALLS

Malaysians are fervent out-of-home diners.



Eating out is so prevalent in Malaysia that it is no longer just for special occasions.

1:2 MEALS EATEN OUT

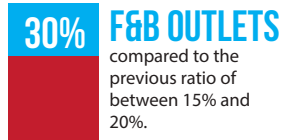
Source: Malaysian Food Barometer (MFB)

F&B ESTABLISHMENTS IN THE COUNTRY

ANNUAL GROWTH RATE ~5% SINCE 2010

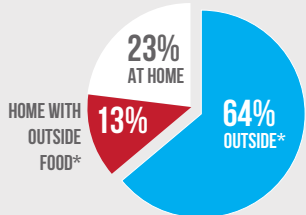
Source: Department of Statistics Malaysia

MALL'S NET LETTABLE AREA (NLA)



Source: Malaysia Retail Chain Association (MRCA)

MALAYSIAN EATING OUT HABITS

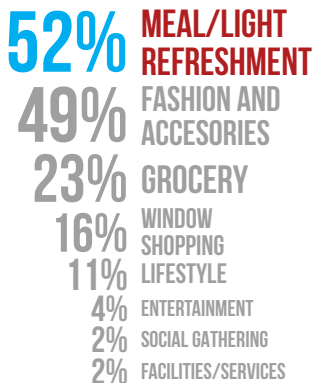


*At least one meal per day
Source: Malaysian Food Barometer, 2014

POTENTIATE'S SHOPPER STUDY

Data gathered from 7,297 shoppers across five malls, Q1 - Q3, 2017

THE REASONS OF VISITING A MALL



* Total does not add-up to 100% due to multiple answer selection

The exponential growth of F&B outlets in shopping malls has a positive influence on the industry. Today, consumers are more informed about food trends and styles, more expectant of good experience and value, more confident in opinion sharing, more tech-savvy and open to new food uses and concepts. There are few new consumer-led concepts that might gain traction in the coming years.

A. CASUALISATION OF F&B OUTLETS

Malaysia has a vibrant street food culture. To keep up with market demands, the growth and popularity of street food has marked the "casualisation" of F&B outlets in shopping malls. The local entrepreneurs are tapping into the local market by bringing simple but tasty street food into the comfortable setting in shopping malls. Most of them started with just a simple kiosk-style establishment or night market-style snacks.

Case studies

- i. Sisters Crispy Popiah: Started in 2001 with a pushcart located at Imbi Market, Kuala Lumpur
- ii. Oyster King: Started in 2008 with three hawker stalls at coffee shops in SS17, SS2 and Kuchai Lama
- iii. Kim Lian Kee Hokkien Mee: Started in 1927 with a stall in Dang Wangi, Kuala Lumpur.
- iv. Penang Road Famous Teochew Chendul: Started in 1936 with a stall in Penang Road, Penang
- v. Ah Cheng Laksa: Started in 1960 with a stall in Alor Star, Kedah

B. TECHNOLOGY SHAKING UP THE F&B INDUSTRY

1) Restaurants with no or lesser visible workers

Fast casual restaurants have started to modernise their customer experience by rolling out self-service concept. The automated restaurants allow the customers to skip the queue and human interaction as placing orders and payments can be done on machine.

The F&B industry is heading towards a more robotic future, accelerated by several economical and operational reasons. From an operational standpoint, the self-service kiosk may increase accuracy, eliminate long lines and expediting the food deliveries. Meanwhile, with virtual cashier and no wait staff, this may reduce labour costs, increase revenue by suggesting upsells during the ordering process and showcase promotions that the customers can easily view the latest menu items, discount items and participate in a customer loyalty programme.

Case studies:

- i. The healthier fast food named as GrEAT located in 1 Utama Shopping Centre PJ
 - Customers can use WeChat app on the smartphone to place order and make payment from anywhere and collect their food at their preferred time.
- ii. McDonald's Kiosks at the Bukit Bintang and Bangsar Telawi branches.
 - Customers may order, customise and pay for their meals on the machine and wait for the number to be called at the collection counter

2) Restaurants with humanoid robots

Another example is to have trained robots serve and attend to customers. The robots are programmed to bring food to the customers' tables along a designated track. The intention is to improve customer experience by reducing the waiting time by half for food to be served during peak hours.

Case study:

- i. Ipoh's Nam Heong Restaurant at Ipoh Soho outlet and Damen outlet in Subang Jaya
 - Customers to get the dishes from the tray themselves after being greeted by the robots and to touch the sensor for the robot to return to its station after collecting the food.

3) Restaurants with location based technology to offer customer unique experience

To enhance real life encounters at physical stores where the waiter or waitress would know you by name and your previous orders, the use of iBeacon technology can help to forge better relationships with the customers. The use of location data gleaned from customer's mobile devices can develop a more holistic understanding of each customer's preferences. It is aimed to provide greater convenience to its customers.

Case study:

- i. A Korean fried chicken restaurant in Malaysia named as KyoChon
 - Communication is now instant and rapid as the staff are alerted to the arrival of customers that have KyoChon's app installed on them using iBeacon technology.



Contributed by

Dr Wong Yue Teng
Associate Director, Business Insights
Potentiate Sdn Bhd

TO LEARN MORE

- Yueteng.Wong@potentiateglobal.com
Barry.Ooi@potentiateglobal.com
- www.potentiateglobal.com



ABOUT POTENTIATE Potentiate Malaysia is a data intelligence company with expertise in Data Analytics, Customer Experience Management and Market Research & Business Insights. It is a subsidiary of Potentiate Australia. We conduct Shopper Behaviour studies using multiple data collection methodologies and technologies, including Exit & Catchment interviews, Geo-location mapping, Desk Research and Mystery Checks. Our analysis is powered by our own proprietary software that leads to clear business insights.

Note: Please contact PPK secretariat if any other members wish to contribute articles to our newsletter. Thank you.

COMING SOON!



PPK Malaysia
Malaysia Shopping Malls Association

PPKM welcomes a new incoming committee onboard for 2018-2020 at the **33rd Annual General Meeting (AGM)** on 24 March. Looking forward to an even more exciting year of activities ahead!



Certification Course in Shopping Mall Management, Session 1-2018 at One World Hotel, Petaling Jaya

PPKM has been organising these courses since 2002. With the numerous malls in the country, we envisage the need for more personnel to undertake these essential training sessions, which are 'mall-centric' and designed to enhance professionalism in the industry.

We are grateful the speakers are hands-on senior personnel in their individual work places and more than willing to share their experiences.

Scheduled from **2-11 April 2018**, the session will cover three modules of Marketing & Leasing, Operations & Maintenance and Administration.

Those interested, please contact secretariat@ppkm.org.my for further details. If the April sessions are too soon for you, they will be repeated from 6-11 August 2018.



Paying particular attention in class reaps knowledge



The technical site visit can be an eye-opener



PPKM-FIABCI Malaysia's Property Management Time Bomb Seminar Series 10: Strata Management - The Way Forward **3 May 2018, Berjaya Times Square Hotel**

It's been 10 years since PPKM co-organised this popular seminar with FIABCI Malaysia and we have been getting good response. Although the regulations were revised several times, the participants are eager to find solutions to their ongoing problems on strata management. The seminar takes a close look at strata management from the viewpoints of both building owners and developers with speakers from the private and public sectors sharing case studies. Registration details are available from fiabcimalaysia@fiabci.com.my, event@fiabci.com.my or you may send your enquiries to secretariat@ppkm.org.my.



Prominent property practitioners at the 2017 seminar
From left: Richard Chan, Organising Chairman/PPKM Advisor; YBhg Tan Sri Dato CK Teo, Director, Bandar Utama Corporation Sdn Bhd/PPKM Advisor/Deputy President, Building Management Association of Malaysia (BMAM); YM Tengku Dato Ab Aziz Tengku Mahmud, FIABCI Malaysia President; Ir Yeow Thit Sang, FIABCI Malaysia Immediate Past President; Mr Yu Kee Su, Secretary General, FIABCI Malaysia and YBhg Dato Pretam Singh Darshan Singh, Partner, Pretam Singh, Nor and Co. Advocates & Solicitors



STUDY TRIPS 2018 Calling all 'Study Trippers'!

We're planning our 2018 trips to visit shopping malls in **Shanghai from 8-11 May**. Shanghai, a famous shoppers' paradise, is known as the "Paris of the east", projecting a cosmopolitan character with contemporary urban living, Western-styled skyscrapers, lively financial and industrial districts as well as ultra-chic and glamorous shopping malls! The four-day/three-night Shanghai trip plans to visit new integrated malls like Raffles City, Changning and Taikoo Hui. Other fascinating malls include Joy City with their distinctive ferris-wheel on the frontage, the art-centric K11 Art Mall which regularly showcases art events and creative window displays, and not forgetting high-end centres such as Shanghai ifc and Iapm Malls. There are also several other established shopping meccas like Plaza 66, Westgate Mall, Super Brand Mall and New World Daimaru with the world's longest spiral escalator. Xintiandi precinct is perhaps the most unique location where old and new Shanghai meets in an entertainment location.



New World Daimaru



Iapm



Joy City



Raffles City Changning

More details are available from secretariat@ppkm.org.my

(A second trip to Tokyo malls is in the planning. Scheduled from 8-12 October, it is subject to confirmation.)



Early notification: For the third year running, we will be organising **PPKM Awards 2018 for Best Experiential Marketing** for the period 1 July 2017 to 30 June 2018. Potential participants can start preparing for their submission materials now. Winners will be announced at the Awards Dinner in August 2018. So, keep the marketing promotions going strong and look out for our announcements soon.



Our Indonesian counterpart, Asosiasi Pengelola Pusat Belanja Indonesia will be organising the **Council of Asian Shopping Centers Conference 2018** in Jakarta in September 2018 in conjunction with Visit Wonderful Indonesia 2018. Watch out for the official announcement in due course.



ICSC RECon Asia-Pacific 2018, 22-24 October, Mandarin Oriental Kuala Lumpur

Registration is now open and we look forward to your strong domestic support and participation for this event. Conference attendees comprising senior executives will come from all over the Asia Pacific region and several key shopping malls will showcase Malaysia's malls as part of the conference programme. For more information and updates, please visit www.icsc.org/2018apc

MUSIC ROYALTY COPYRIGHT FEES PAYABLE TO MUSIC RIGHTS MALAYSIA (MRM)



Effective 1 October 2017, MRM has taken over the collection of all music copyright royalty fees and comprises of all four previous collecting bodies as follows:

- Music Authors' Copyright Protection (MACP) representing composers and lyricists
- Public Performance Malaysia (PPM) representing recording companies
- Recording Performers Malaysia Bhd (RPM) representing performing artistes
- Performers Rights and Interest Society of Malaysia Bhd (PRISM) **also** representing performing artistes.

On behalf of members, PPKM has negotiated with MRM for members' preferential rates under an agreement which will take effect for two years from 1 January 2018 to 31 December 2019.

In the meantime, Radiospax has also offered preferential rates to members for royalty-free music as an alternative music source.

Kindly contact PPKM secretariat if you require more details.

BOARD OF VALUERS, APPRAISERS, ESTATE AGENTS AND PROPERTY MANAGERS

Following recent amendments to the Valuers, Appraisers, Estate Agents and Property Managers (VAEP) Act 1981 via Section 22F, all qualified personnel working in property management, including shopping malls, are required to be registered as property managers. This will be available within 12 months commencing from 2 January 2018 to 31 December 2018 and all relevant personnel working in shopping malls are requested to undertake the necessary registration soonest possible. PPKM together with Real Estate and Housing Developers Association (REHDA) have now been offered one board representation each on the Board of Valuers, Appraisers, Estate Agents and Property Managers (BOVAEP).



Launch of the Register of Property Managers with BOVAEP on 11 January 2018 officiated by YB Dato Seri Johari Abdul Ghani, Minister of Finance II and YB Tan Sri Noh Haji Omar, Minister of Urban Wellbeing, Housing and Local Government at KL Hilton. Tan Sri Datuk Eddy Chen is standing on the extreme right with other property industry practitioners.

SALES DATES 2018



Members are encouraged to plan mall activities for the following sales dates for this year which have been confirmed and gazetted by the relevant authorities:

- Malaysia Super Sale (MSS) 1 February – 15 March 2018
- Malaysia Mega Sale Carnival (MMSA) 15 May – 31 July 2018
- Malaysia Year End (MYES) 1 November – 1 January 2019

PAST ACTIVITIES

TTT: CREATE THE PERFECT MALL AMBIENCE, 7 December 2017



Picking up tips in a relaxed atmosphere

Philips Lighting hosted the TTT at their premises with a short briefing by Mr Jason Tan, Shopping Mall Architecture Manager.

This was followed by a demonstration of how creative lighting coupled with new technology can enhance ambience in a mall and/or produce attractive signages.

The event was attended by 34 participants from the Central, Northern and Southern regions.



Create a new ambience with lighting colours

SOUTHERN REGIONAL MEETING, 15 December 2017, Holiday Villa Johor Bahru



Cheerful faces and a happy meeting down south!

PPKM Central committee, led by Mr MK Foong, Treasurer, connected with Southern Region members for a briefing on industry updates, which included the registration of property managers and music royalty copyright fees. Representatives from Radiosparx also gave a talk on an alternative source for royalty-free music.

PAST ACTIVITIES

CEO THINK TANK LAB, 24 January 2018, Westin Kuala Lumpur

For the first time ever, PPKM organised a Think Tank Lab (TTL) to bring together eminent industry players from the shopping mall industry. CEOs from several shopping malls were invited so that the TTL could harness the synergy of their invaluable expertise and pertinent experience to augment the development of shopping in our country. The panelists included PPKM's panel of advisors and CEOs from key shopping malls like Andrew Brien of Suria KLCC, Philip Ho of Pavilion REITs International and Dato Jeffrey Ng, Chairman, Malaysia REIT Managers Association (MRMA) who shared significant statistics on shopping mall real estate investment trusts (REITs). Dato Joyce Yap, PPKM Advisor was the moderator who anchored the deliberations.



In his welcome address, Tan Sri Datuk Eddy Chen, emphasized the need for the collation of pertinent data and statistics for our industry



Mr HC Chan, CEO Sunway Malls shared his vast experience of using the synergy of integrated developments for shopping malls

Besides being an excellent opportunity for the mall owners and specialists to network and exchange invaluable insights of our industry, participants also benefitted from a presentation by David Larkin, Director CISTRI Singapore who gave an overview of Kuala Lumpur malls in the current scenario of digital disruption and the resulting new trends.



Mr Joseph Yeo, Vice President, YTL Land and Development Bhd shared on new visions for Lot 10



A well-deserved lunch for all after the high-powered dialogue

GST AMBASSADOR PROGRAMME, 16 January 2018, Sky Deck, Summit USJ



GST Overview by Tuan Nor Azman Baharom

Under the ongoing GST Ambassador Programme, the GST team headed by Tuan Nor Azman Baharom, Assistant Director, Royal Malaysian Customs Department (Jabatan Kastam Diraja Malaysia) were at hand for a dialogue session with members to explain and clarify grey areas on billing and submission procedures.

The discourse on common problems was helpful and PPKM thanks Summit USJ for kindly providing the complimentary venue.

The **20th Malaysia Tourism Awards 2016/2017** presentation was held on 28 February at Putrajaya International Convention Centre. This biennial event, first introduced in 1987, serves to incentivise tourism industry partners towards higher professionalism. The awards recognise and honour local and international tourism industry players for outstanding and innovative products and services across 14 categories, including two separate awards for Best Shopping Centre Integrated and Stand-Alone. Congratulations to Sunway Putra Mall general manager Phang Sau Lian and Komtar JBCC senior general manager Jennie Parr for winning the above categories respectively!



Also present were HC Chan, Sunway Shopping Malls & Theme Parks CEO, SL Phang, Sunway Putra Mall GM and Kevin Tan Gar Peng, Sunway Shopping Malls COO



Tourism Malaysia chairman Dato' Dr Siew Ka Wei poses with Komtar JBCC senior general manager Jennie Parr and staff at the award presentation.

MEMBERSHIP 2018

CORPORATE MEMBERS

1 Utama Shopping Centre
1MK Mall
1Shamelin Shopping Mall
1st Avenue Mall
Alam Sentral Plaza
Alor Star Mall
Aman Central
Amcorp Mall
Amerin Mall
Atria Shopping Gallery
avenue K
Bangsar Shopping Centre
Batu Pahat Mall
BB Plaza
Bentong Vega Mall
Berjaya Megamall
Berjaya Times Square Kuala Lumpur
Berjaya Waterfront Complex
Central i-City Shopping Centre
Central Market
Central Square Sungai Petani
Centre Point Sabah
Centro
Cheras Leisure Mall
Citta Mall
City Mall
Cityone Megamall
Damen Mall
Dataran Pahlawan Melaka Megamall
Dayabumi
DC Mall
Design Village Outlet Mall
Digital Mall
Dpulze Shopping Centre
e @ Curve
East Coast Mall
Eastern Mall
Ekocheras Mall
Emart Batu Kawa
Empire Shopping Gallery
Encorp Strand Mall
Endah Parade
Evolve Concept Mall
fahrenheit 88
First World Plaza
Gamuda Walk
gateway@klia2
Genting Highlands Premium Outlets
Giant Hypermarket Jalan Kebun
Giant Hypermarket Bandar Kinrara
Giant Hypermarket Banting
Giant Hypermarket Batu Caves
Giant Hypermarket Bayan Baru
Giant Hypermarket Cheras
Giant Hypermarket Kelombong
Giant Hypermarket Kemuning Utama
Giant Hypermarket Klang
Giant Hypermarket Klang Sentral
Giant Hypermarket Kota Damansara
Giant Hypermarket Kota Padawan
Giant Hypermarket Kuala Terengganu
Giant Hypermarket Kuantan
Giant Hypermarket Mall Sibui
Giant Hypermarket Melaka
Giant Hypermarket Muar
Giant Hypermarket Nusa Bestari
Giant Hypermarket Petra Jaya
Giant Hypermarket Plentong
Giant Hypermarket Prima Prai
Giant Hypermarket Putra Heights
Giant Hypermarket Senawang
Giant Hypermarket Seri Kembangan
Giant Hypermarket Shah Alam
Giant Hypermarket Subang Jaya
Giant Hypermarket Sungai Petani
Giant Hypermarket Tabuan Jaya
Giant Hypermarket Taiping
Giant Hypermarket Tampoi
Giant Hypermarket Tawau
Giant Hypermarket Ulu Klang
Giant Mall Kelana Jaya
Giant Setapak
Giant Superstore Bandar Puteri
Giant Superstore Gong Badak
Giant Superstore Jerreh
Giant Superstore Kampar
Giant Superstore Kangar
Giant Superstore Keningau
Giant Superstore Kuala Pilah
Giant Superstore Kuala Selangor
Giant Superstore Lukut
Giant Superstore Nilai
Giant Superstore Prima Saujana (Kajang)
Giant Superstore Sandakan
Giant Superstore Sunway City Ipoh
Glo Damansara
GM Klang
Grand Merdeka Mall
Great Eastern Mall
Green Heights Mall
Gurney Paragon
Gurney Plaza
Harbour Mall Sandakan
Hartamas Shopping Centre
Imago, KK Times Square
Intermark Mall
IOI City Mall
IOI Mall Bandar Putra Kulai
IOI Mall Puchong
IPC Shopping Centre
Ipoh Parade
Island Plaza
ITCC Mall
Jaya Shopping Centre

Jesselton Mall
Jetty Point Duty Free Complex
Johor Bahru City Square
Johor Bahru City Square Office Tower
Johor Premium Outlets
KB Mall
KL Gateway Mall
Klang Parade
Kluang Mall
Kompleks Bukit Jambul
Kompleks Metro Point
Kompleks Mutiara
Kompleks Star Parade
Kompleks Tun Abdul Razak (KOMTAR)
Kota Raya Complex
KSL City Mall JB
KSL Esplanade Mall
Kuantan Parade
KWC Fashion Mall
Kulim Central
Langkawi Fair Shopping Mall
Lot 10
M3 Mall
Mahkota Parade, Melaka
Maju Junction Mall
Medan MARA
Melawati Mall
Merdeka Mall
Mesamall
Mid Point Shopping Complex
Mid Valley Megamall
Mitsui Outlet Park KLIA
Mydin Mall
MyTown Shopping Centre
New World Park
Nexus Bangsar South
Nu Sentral
Oceanus Waterfront Mall
One City
PacifiCity
Pandian Kapital
Paradigm Mall
Paradigm Mall Johor Bahru
Paragon Point Shopping Centre
Pavilion Kuala Lumpur
Paya Bunga Square (PB Square)
Pearl Point Shopping Mall
Pelangi Leisure Mall
Penang Plaza
Penang Times Square
Perling Mall
Pernama Kompleks Mutiara Armada
Pertama Complex
Plaza Angsana
Plaza Low Yat
Plaza Merdeka
Plaza Metro Kajang
Plaza Pelangi
Plaza Salak Park 'SPARK'
Plaza Shah Alam
Plaza Tasek
Prangin Mall
Publika Shopping Gallery
Puteri Harbour Retail
Queensbay Mall
Quill City Mall
RCMC Sdn Bhd
SACC Mall
Sarawak Plaza
SB Mall
Segamat Central Shopping Centre
Sejati Walk
Selayang Star City
Semua House
Seremban Prima
Setapak Central
Setia City Mall
Shaw Parade KL
Shaw Centrepoint
Skudai Parade
South City Plaza
Star Avenue Lifestyle Mall
Starhill Gallery
Straits Quay
Subang Parade
Sungei Wang Plaza
Sunshine Tower
Sunway Carnival Mall
Sunway Giza Mall
Sunway Putra Mall
Sunway Pyramid
Sunway Velocity
Suria KLCC
Suria Sabah Shopping Mall
Sutera Mall
Taiping Mall
Terminal One Shopping Centre
The Curve
The Gardens Mall
The Main Place
The Mines
The Spring
The Starling
The Summit Subang USJ
The Waterfront @ Parkcity
The Weld
Tropicana City Mall
Tropicana Gardens Shopping Mall
Tun Razak Exchange
U Mall Pulau Utama
Utropolis
Viva Home Shopping Mall
Vivacity Megamall, Kuching
Wangsa Walk Mall
Wetex Parade Shopping Centre

LEGEND

Certified Mall Marketing & Leasing Manager (CMMLM)
Certified Mall Operations Manager (CMOM)

Certified Mall Administration Manager (CMAM)
Certified Mall Manager (CMM)

INDIVIDUAL MEMBERS

Abdul Aziz b Aman
Abd Rahim Hilmi b Zakariya
Abdul Razak Tuah b Othman, CMOM
Abd Kahar b Rahmat
Abukhori b Kasim, CMOM
Agnes Tan Mee Yoke
Aida Azimah Mohamad Abas, CMMLM
Aishah Kon bt Abdullah
Ally Choo Kwee Yeng, CMMLM
Aminudin b Mohd Noah, CMOM
Amos Chew Yee Onn, CMMLM
Andrew Ashvin, CMM
Ang Khoo Looi, Carol
Ang Kung San
Anthony Dylan anak Frankie Jurem
Aw Ik Qian, CMMLM
Azhah bt Ahmad, CMMLM
Beh Chin Sien
Beh Soo Ming
Capt (R) Kon Si Chong, CMOM
Carmen Lee Suet Hoong, CMOM
Carriek Chong Ka Loong, CMOM
Chan Chin Meim
Chan Hong Kong, Peter
Chan Jen Nee, Jenny, CMM
Chan Pui Li
Chan Wai Lip, CMOM
Chan Wei Ling, CMMLM
Chang Yar Leng, CMMLM
Chee Ken Fah, Daniel, CMM
Chee Kok Leong, Danny
Cheng Yew Ong
Cheong Chui Cheh, Eileen, CMMLM
Cheong Su Yen, Krystina
Cherci Chan Huey Chyn, CMMLM
Chew Fei Sean, CMMLM
Chew Siew King, Candy
Chew Yen Yen, Doreena, CMMLM
Chia Nyuk Yin
Chia Wen Jun, CMMLM
Chin Wah Sheng, CMOM
Chiu Jing Chun, Selwyn, CMOM
Choo Wan Da, Desmond
Chong Min Fui, Vincent, CMM
Chong Ing Xin
Chow Heng Wah, CMM
Chu Chia Siong, CMOM
Chua E Fun, CMMLM
Chua Jenny
Chuah Chong Koh, CMMLM
Chuah Ying Huey
Chuang Chew Loon, Alvin, CMOM, CMAM
Darren Chear
Dato Sri Dr. Vincent Tiew Soon Thung
David Lau Hing Luong, CMM
Dr. Alvin Lim Boon Yew
Elizabeth Chan Choo Im
Emyryza bt Mohamed
Eric Tee Lai Keong
Erwin Chung Liang Zhen, CMMLM
Eugene Khoo
Esmel Eng Shih Mei
Eva Hew, CMMLM
Evelyn Lo, CMM
Fazrul Isham b Mohd, CMMLM
Fern Tan Feng Ching
Foong Meng Khum, CMM
Ghafizah Hanim Amir
Goh Boon Ooi
Goh Chong Woi
Hamish Chartres
Hee Yaw Hoong, Darren, CMMLM
Herbie Tan Kim Whatt
Hiew Boon Kee, CMMLM
Hirdawati Mohd Nasir, CMAM
Ho Ka Khong
Ho Wai Hoong, CMMLM
How Siew Choo
Hok Wai Khui, CMMLM
Ishraqi Shah b Abu Bakar, CMMLM, CMOM
Jason Chin Teck Seng
Javed Irshad Sani
Jeffrey Sia
Jeffrey Soon Jun Yann, CMAM, CMMLM
Joseph Teo Fang Yih, CMMLM
Josephine Lim Kwee Yuen, CMAM
Julia Chan
Junairiah bt Afandi, CMAM
Kamarul Ariffin b Abdul Latiff, CMOM
Katherine Tan
Kenny Chin Chong Huat, CMM
Khairilham b Khamis
Kho Chung Hong, Charlie, CMM
Kho Lay Her
Khor Siak Seng, Vincent
Koay Poay Shin, CMMLM
Kok Huei Yuen
Koong Choy Yoke
Kung Suan Ai, CMMLM
L Izwan b Abdullah, CMMLM
Lai Yung Ming, Marco
Larry Tan Teck Lai
Lau Chore Yee, John
Lawrence Teh Cheng Poh
Lee Beng Beng, CMM
Lee Chee Hoe
Lee Chin Mun
Lee Mun Keong
Lee Yih Eng
Leong Pik Yi
Lew Wen Feng, CMMLM

Lim Hooi Fung, CMOM
Lim Fei Yoon
Lim Kee Han
Lim Kok Kheng
Lim Koon Hooi, Cynthia, CMMLM
Lim Rong Jlang, CMMLM
Lim Su Yi
Lim Wen Li
Lisbet Ling Kiang Hfoong, CMMLM
Loh Kok Chai, CMM
Loo Ai Leen, CMMLM
Loo Hoey Theen
Loong Jee Yung
Lum Youk Lee
Ma'amur Gadafy b Abdul Rashid
Mabel Tan Mui Pow, CMMLM
Mah Liyun, CMMLM
Maheeran bt Hamdani
Marilyn Chuah Siu Ching, CMMLM
Michael Poh Oon Howe
Michelle Chin Mee Ching
Mohamad Nazri b Mohd Mokhtar, CMOM
Mohamad Amirudin b Abu
Mohd Izaham Syah b Hamdan, CMAM
Mohd Nizam b Abdul Rahman
Mohd Saukat Ali bin Mohd Ghazaly
Mohd Shahril b Mohd Shariff
Mohd Taufiq bin Shamsuddin
Mok Choo Yum
Muhamad Fahmi b Md Yatim
Muhammad Raffiy bin Azizan, CMAM, CMMLM
Nadimie b Jamsani
Ng Bee Fong, Samantha, CMOM, CMMLM
Ng Kuan Yee, Selina
Nik Azlan Nik Aman
Noor Salehah bt Wahid, CMMLM
Nor Hayati bt Nawawi Suri
Norlian bt Md Tahir
Norbaiah bt Mohd Yusof
Nur Hazreena bt Abdullah
Ong Eng Hin, CMM
Ong Hui Ling
Ooi Boon Shya, Jean
Ooi Kee Chuan
Padma Prian @ Padman s/o Maniam
Pang Seong Wah
Patrick So Kee Whuay
Pearly Hue Pei Ni
Pearly Lim Meng Li, CMMLM
Phang Sau Lian
Phoon Kin Kheong, CMM
Ramesh a/I Arumugam
Rashidan b Ismail, CMOM
Richard Chan Chee Keong, CMM
Ronald Ling Ling Han, CMMLM
Royston Ling Ing Ding
Samantha Ooi Sui Lin
San Wei Hwa, Vivien
Saw Lee Chuan
See Lung Yih
Set Hon Foong
Shahrol Azman b Abd Kahar, CMOM
Shaifulddin A. Majid, CMM
Sharon Lee Sui Fong, CMMLM
Siegfried Shaun Dela Pena Tan
Sin Tiew Cheo, CMM
Sit Chee Koon, CMMLM, CMAM
Soon Guok Jie
Stanley Kok Yin Cheong, CMMLM
Steve Lim Boon Hoe
Subramaniam Apparow, CMOM
Suhadi B Mohd Sukor, CMOM
Tan Boon Chun, CMMLM
Tan Cheng Guan
Tan Chuan Kang
Tan Gar Peng, Kevin
Tan Hui Swan, Farrer, CMMLM
Tan Joon Kai
Tan King Way
Tan Ping Yi
Tan Sri Datuk Eddy Chen Lok Loi
Tan Sri Dato Teo Chiang Kok
Tan Sook Yuen, Charmaine
Tan Ting Sin, CMOM
Tang Chee Weng
Tang You Qing, Eugenie
Teh Siew Yan, CMAM
Teoh Ee Ling, CMMLM
Teoh Eng Chiat, Andrew
Teoh Song Loon, CMMLM
Tian Keng Swee, CMOM
Toh Kai Wei
Tun Mohd Afandi b Yusof
V Mayantharan a/I Valayutham
Winnie Sam Min Wah, CMMLM
Wong Chun Khean, Kent
Wong Kong San
Wong Sook Voon, CMMLM
Wong Woei Ming, Michael, CMOM
Wong Yik Kae
Yakob Haron, CMOM
Yap Wee Kee
Yeap Chin Chong, CMM
Yeap Huey Ling
Yeo Yee Yean
Yong Lee Yung, CMAM
Yong Yuet Lan, CMMLM
Yuen Chew Yung
Zainab bt Abd Kadir
Zahayu Shima bt Ayub, CMMLM
Zulkahar b Khamis, CMOM

HONORARY MEMBERS

Dato' Ngeow Voon Yean
Tan Sri Dato' Teo Chiang Kok
Dato' Joyce Yap, CMM
HC Chan, CMM

ASSOCIATE MEMBERS

Ng Hean Yin

AFFILIATE MEMBERS – INDIVIDUAL

Elise Lee
Gan Siew Chan
Hoi Kong Fei
Kevin Chiu Zhenwei, CMMLM, CMAM
Lee Pei Ling
Lim Chee How
Ng Choo View, Thomas
Ong Shi Yee, Eunice
Phan May Ling
Sharon Tan Pet Szu
Tan Chwan Tee, Robin
Tay Seow Liang, Victor
Tee Kok Guan
Timothy Sangawa
Voon Yen Lee
Wong Paik Tho
Woo May Foong
Yasmin Mokhtar
Yew Poh Ling

AFFILIATE MEMBERS – CORPORATE

BBCC Development Sdn Bhd
Code Entertainment Sdn Bhd
Fair Star Shopping Sdn Bhd
Festival City Sdn Bhd
Golden Mayflower Sdn Bhd
IFCA MSC Bhd
Musixmusic Sdn Bhd
Nearby South East Asia Sdn Bhd
Potentiate Sdn Bhd
R & F Development Sdn Bhd
R & F Engineering & Construction Sdn Bhd
Selangor Dredging Bhd
Stratos Consulting Group Sdn Bhd
Tanand Technology Sdn Bhd
The Hot Shoe Show & Company Sdn Bhd
The Lot Associates Sdn Bhd
Visata Creative Sdn Bhd

NETWORKING PARTNERS

Asosiasi Pengelola Pusat Belanja Indonesia (APPBI)
Association of Consulting Engineers (ACEC)
BBKLC Tourism Association, Kuala Lumpur
British Council of Shopping Centers (BCSC)
Building Management Association of Malaysia (BMAAM)
Council of Asian Shopping Centers (CASC)
Dewan Bandaraya Kuala Lumpur (DBKL)
Eastern Regional Organisation for Planning & Housing (EAROPH), Malaysia
FIABCI Malaysia Chapter
Fire Prevention Council Malaysia (FIPCOM)
Hong Kong Trade Development Council
Institute of Shopping Center Management Ltd (ISCM), Hong Kong
International Council of Shopping Centers (ICSC)
Jabatan Bomba dan Penyelamat Malaysia
Japan Council of Shopping Centers (JCSC)
Korea Building Owners & Managers Association (KBOMA)
Malaysia Crime Prevention Foundation (MCPF)
Malaysia Retail Chain Association (MRCA)
Malaysia Retailers Association (MRA)
Malaysia Green Building Confederation (MGCBC)
Malaysian Association of Convention and Exhibition Organisers and Suppliers (MACEOS)
Malaysian Association of Hotel Owners (MAHO)
Malaysian Association of Hotels (MAH)
Malaysian Association of Travel & Tour Agents (MATTA)
Malaysian Franchise Association (MFA)
Malaysian Tourism Federation (MTF)
Mall China
Middle East Council of Shopping Centers (MECCS)
Nordic Council of Shopping Centers (NCS)
Pertubuhan Akitik Malaysia (PAM)
Property Council of Australia (PCA)
Quality Restroom Association of Malaysia (QRAM)
Real Estate & Housing Developers Association, Singapore (REDAS)
Real Estate and Housing Developers Association (REHDA)
Shopping Center Council of Australia (SCCA)
Taiwan Council of Shopping Centers (TCSC)
The Associated Chinese Chambers of Commerce and Industry of Malaysia (ACCIM)
The Institute of Engineers, Malaysia (IEM)
Tourism Malaysia



A608, 6th Floor, Block A (Lobby No. 2), No. 1, Jalan SS20/27, Damansara Intan, 47400 Petaling Jaya, Malaysia Tel: 603 - 7727 6202/6232 Fax: 603 - 7727 6203 Email: secretariat@ppkm.org.my URL: ppkm.org.my