



SHANGHAI RETAIL TRADE LANDSCAPE REPORT

June 2026

Monthly Brand & Store Opening Intelligence

35 NEW ENTRIES TRACKED

15 FLAGSHIP FIRST STORES

24 DISTINCT MALLS

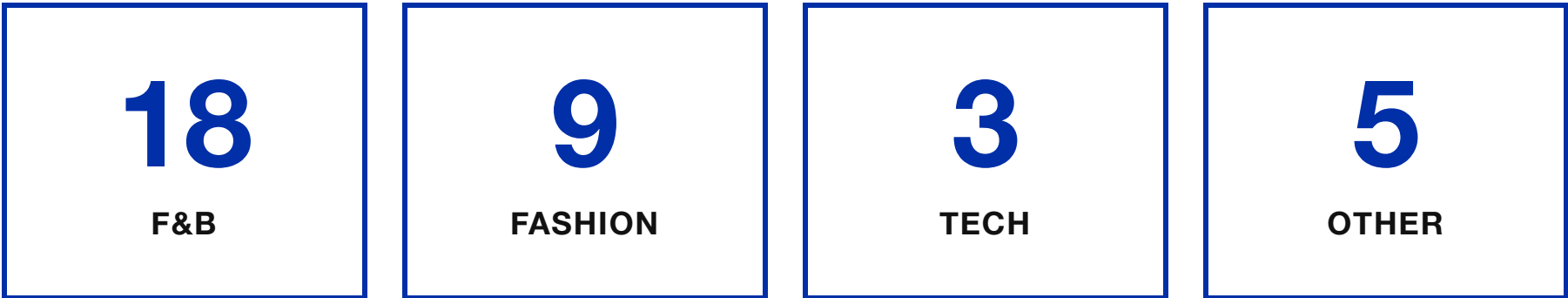
LIONSTEPHEN SHANGHAI RETAIL RADAR

ISSUE 06 · 2026 · ENGLISH EDITION

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Executive Summary

June 2026 recorded **35 verified brand openings** across Shanghai's retail landscape, dominated by **F&B (51%)** and **Fashion (23%)** verticals.



TOP MALLS BY ENTRY VOLUME

01	漕河泾M+商业中心	8
02	蟠龙新天地	3
03	上海环球港	3
04	西岸中環	1
05	港汇恒隆广场	1

F&B Dominance

18 of 35 entries (51%) in F&B. Key sub-trends: regional cuisine revival, AI-district dining clusters, and craft beverage expansion.

KEY F&B OPENINGS

雍容荟	港汇恒隆广场
BLACKHEAD	蟠龙新天地
泡芙云书屋	蟠龙新天地
omitofee	闵行/浦江郊野公园滨江漫步区
拓竹	上海万象城
暖酒雅舍	漕河泾M+商业中心
半恋普拉提	漕河泾M+商业中心
嘉禾颂	漕河泾M+商业中心
黔嬢嬢遵义羊肉粉	漕河泾M+商业中心

STRATEGIC INSIGHT

Caohejing M+ (Xuhui) absorbed 8 F&B entries — all positioned for AI-tenant daypart demand: business lunch, social decompression, late-night wine.

Flagship First Stores

15 first-store flagships in the period — Shanghai, China, and global debuts.

DEBUT MAP

01

omitofee

闵行/浦江郊野公园滨江漫步区

上海首店

02

拓竹

上海万象城

华东首店

03

MEERIO米瑞欧

上海商城

上海首店

04

SINOON

东湖路30号FUFU园区

中国首店

05

锦府嘉宴

漕河泾M+商业中心

上海首店

06

暖酒雅舍

漕河泾M+商业中心

上海首店

07

EAZZY fit

漕河泾M+商业中心

上海首店

08

DM DANCE STUDIO

漕河泾M+商业中心

上海首店

Spotlight: Caohejing M+

The **AI-innovation campus commercial anchor** in Xuhui absorbed 8 brands in one cycle, the densest cluster of the period.



CLUSTER ROSTER

- 锦府嘉宴
- 暖酒雅舍
- EAZZY fit
- DM DANCE STUDIO
- 半恋普拉提
- 嘉禾颂
- 黔嬢嬢遵义羊肉粉
- 白二爷面馆

STRATEGIC INSIGHT

"AI worker daypart" demand profile: 60-minute lunch, decompression fitness, late evening wine & social.

PRISMA Xinjia Center

36,000 m² mega-complex at Jinqiao, Pudong. Opened **June 30, 2026**. Trackable entry: **1**.

78%

FIRST-STORE & FEATURED BRAND SHARE

STRATEGIC INSIGHT

Pudong's largest commercial opening of the year. Flagship tier includes Lamer, HR, lululemon (Pudong-largest), CheeseHead (national debut), MUJI, Ole, IMAX cinema.

JD MALL Shanghai Qibao

JD's first **Shanghai MALL** · ~50,000 m² · opened **June 12, 2026** · 28th national store.

200+
BRANDS

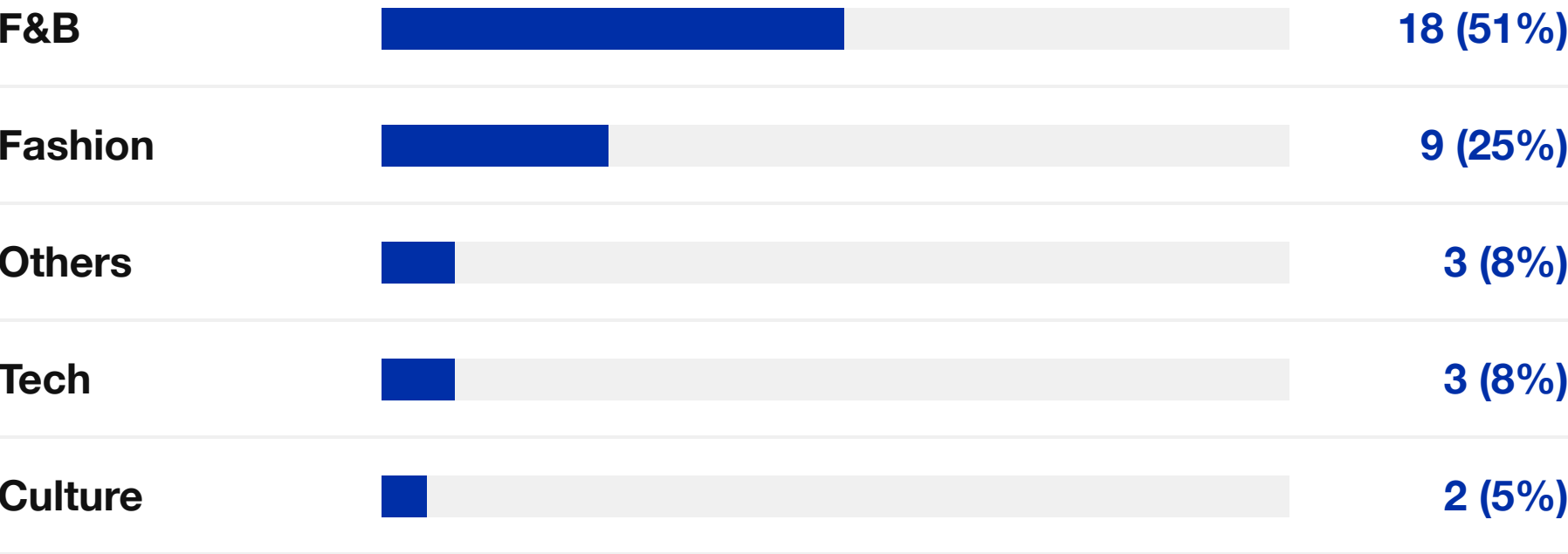
200K+
SKUS

NOTABLE DEBUTS INSIDE

Zhiyuan Robotics	GLOBAL 1ST
Marshall	SHANGHAI FLAGSHIP
Bambu Lab (拓竹)	EAST CHINA 1ST
Jinbang Timing (金榜题名)	NATIONAL 1ST
JD Home Smart Aging	NATIONAL 1ST

Category Mix

Vertical distribution across 35 entries.



STRATEGIC INSIGHT

F&B saturation in lifestyle districts; Fashion & Lifestyle pivot toward scenarized concept stores over SKU volume.

District Heatmap

Top districts by entry concentration.

01	漕河泾M+商业中心	8
02	蟠龙新天地	3
03	上海环球港	3
04	西岸中環	1
05	港汇恒隆广场	1
06	鑫都满天星生活广场	1
07	TX淮海	1
08	京东MALL	1
09	闵行	1
010	古北黄金城道	1

STRATEGIC INSIGHT

Xuhui & Pudong dominate on Caohejing M+ and PRISMA Xinjia clusters. Jing'an and Hongqiao trail in premium F&B and lifestyle.

An office-lunch & decompression template is forming near AI parks

Caohejing M+ is the proof point. **8 brands in one cycle**, 80% F&B, all positioned around a single "daypart" thesis: tech-worker lunch, decompression fitness, late-evening wine & social.

WHAT HAPPENED

A **50,000 m²** commercial anchor opened inside the Caohejing Bei-Yang AI Town (北杨人工智能小镇), embedding **600+ tech companies and 10+ unicorns** within walking distance. The leasing team pre-sold to F&B operators on a "daypart" thesis — lunch for office workers, fitness for decompression, late-night wine for cross-team socializing.

WHY IT MATTERS

The "tech worker" cohort has compressed leisure windows and outsized per-capita spending. A single 50K m² box can replace **three traditional shopping-mall footprints** in revenue density if the daypart thesis holds. This is the first repeatable playbook for science-park-adjacent retail in China.

EVIDENCE — 8 BRANDS UNDER THIS THESIS

• 锦府嘉宴

Other

• 暖酒雅舍

F&B

• EAZZY fit

Sports

• DM DANCE STUDIO

Sports

• 半恋普拉提

• 嘉禾颂

• 黔嬢嬢遵义羊肉粉

• 白二爷面馆

Two parallel shifts reshape Pudong & tech retail formats

02 · PUDONG EAST-WEST CORRIDOR

PRISMA Xinjia (36K m², 6/30) + JD MALL Qibao (50K m², 6/12) collectively delivered **~86,000 m² of new supply** in a single month — Pudong's largest commercial addition in three years. Both projects target **middle-to-high income family catchments** in Jinqiao, Huamu, and Kangqiao.

EVIDENCE

- 漾应的火塘PRISMA新嘉中心
- 酉坞里 bistro 醉鸡煲世博天地

RISK Oversupply in eastern Pudong — watch Sangti / Lujiazui in H2 for softening rents.

03 · TECH × RETAIL CONVERGENCE

Robotics, 3D printing, and smart-aging products are moving from professional trade shows into mainstream malls. The lead case: **Zhiyuan Robotics' first physical store** sits inside JD MALL Qibao, treating consumer retail as a real-world deployment testbed.

EVIDENCE

- 智元机器人京东MALL
- 拓竹上海万象城
- 锦府嘉宴漕河泾M+商业中心
- 暖酒雅舍漕河泾M+商业中心
- EAZZY fit漕河泾M+商业中心
- 嘉禾颂漕河泾M+商业中心

RISK Tech retail depends on novelty cycles — anchor tenants need a 6-month refresh roadmap.

Regional cuisine revival & three next-step actions

04 · REGIONAL CUISINE REVIVAL

Nine of eighteen F&B entries in the period root their identity in specific Chinese regions — Hubei (Laicai), Guizhou (Qian Niangniang), Yunnan (Yangying), Chengdu (Feng Xiaozhang), Shanghai (Jin Fu Jiayan). National chains are now expanding into Shanghai as the proving ground for cross-region rollout.

• 锦府嘉宴	漕河泾M+商业中心
• 嘉禾颂	漕河泾M+商业中心
• 黔嬢嬢遵义羊肉粉	漕河泾M+商业中心
• 漾应的火塘	PRISMA新嘉中心
• 来菜	上海环球港
• 酉坞里 bistro 醉鸡煲	世博天地

THREE NEXT-STEP ACTIONS

- 01

Track Caohejing M+ sales density
Wait 60 days post-opening, benchmark revenue per m² against a comparable central-box mall. If >1.3x, the AI-park template is repeatable; deploy monitoring system.
- 02

Monitor PRISMA Xinja tenant mix evolution
Pudong's largest 2026 opening. Re-survey in Q4 2026 to identify which first-stores converted to permanent leases — proxy for "concept-validated" tenants.
- 03

Build regional-cuisine supplier map
Regional chains entering Shanghai need origin-verified ingredients. Mapping 3-5 suppliers per cuisine category (Hubei lotus root, Guizhou chili, Yunnan mushrooms) becomes a defensive moat for the next 18 months.

Methodology & Integrity

DATA SOURCES

Multi-source web intelligence — 36Kr, Winshang, Jiemian, The Paper, Yicai, 21st Century Business Herald, official brand channels. Each entry is cross-validated against **≥2 independent public reports** before publication.

SCOPE

Shanghai only. New physical store openings, concept launches, regional-chain debuts. Excludes e-commerce, store renovations, and pop-ups shorter than 30 days unless the pop-up is a global/national first.

TIME WINDOW

Report covers **May–June 2026** openings. Data captured through **2026-07-09**. First-publication date on the source article is the entry timestamp; "未开业" entries (deco / hoardings) are marked separately.

RED-LINE POLICY

Six candidate entries were **excluded** from this report for failing source-validation — including the **fabricated brands surfaced in our June 2026 audit**. We publish only what we can defend with a public source.

CONTINUOUS IMPROVEMENT

This month, our internal audit identified 6 unverifiable entries in the June master table. All 6 were removed before report generation. LIONSTEPHEN BRAND RADAR operates a **zero-tolerance policy on fabricated content** — every entry must pass the "信源↔条目逐条核对" test.

END OF REPORT

ISSUE	06 · 2026
ENTRIES TRACKED	35
TRENDS HIGHLIGHTED	04
METHOD	SZ4AI BRAND RADAR
LANGUAGE	ENGLISH

NEXT ISSUE

JULY 2026 · 22 NEW ENTRIES · TRACKING IN PROGRESS

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