



NATIONAL LANDING

RETAIL OVERVIEW & OPPORTUNITIES

JBG SMITH
AT
NATIONAL
LANDING

UNPARALLELED LOCATION AT THE CENTER OF THE REGION



THE VISION FOR NATIONAL LANDING

WHERE INNOVATION AND PLACE MEET.

Leveraging visionary placemaking expertise, JBG SMITH is reimagining National Landing into a world-class city synonymous with innovation and impact. Uncompromising in our vision, we are remaking National Landing into a top-tier “New City” market. As the neighborhood’s powerful fundamentals collide with the catalyzing force of Amazon, we are breaking ground on a city of the future.

JBG SMITH'S NATIONAL LANDING PRESENCE

56%

of Commerical Market

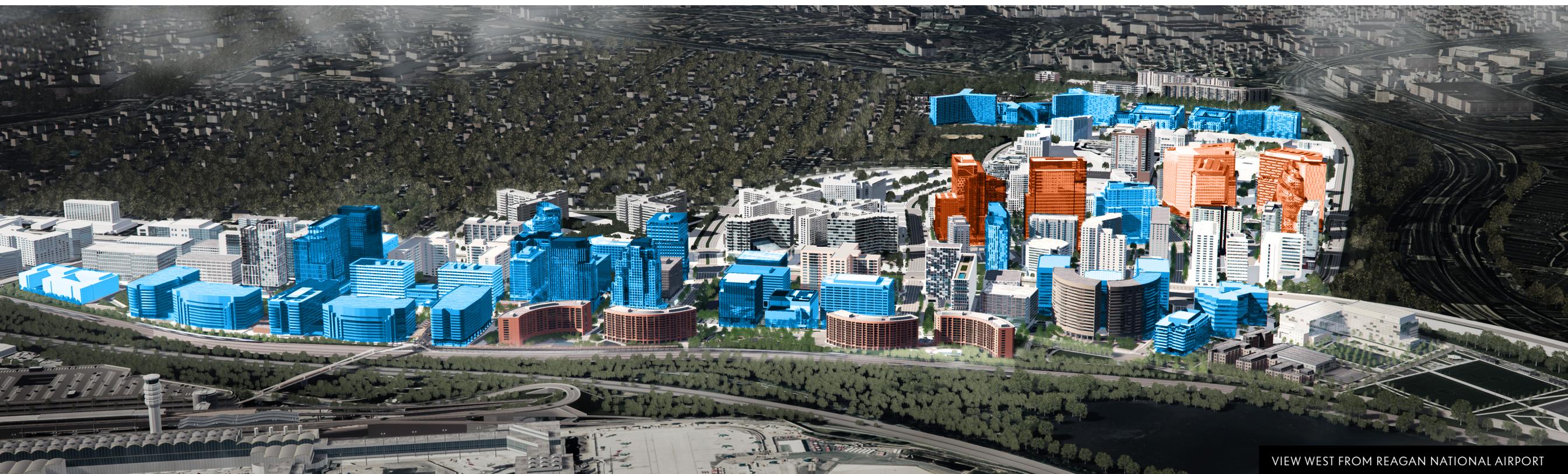
28%

of Residential Market

77%

of Unencumbered Market (7.5M SF)

ONE LANDLORD. ONE COHESIVE VISION.



VIEW WEST FROM REAGAN NATIONAL AIRPORT

- JBG SMITH Assets
- Amazon HQ2

\$12B OF PHYSICAL INFRASTRUCTURE IMPROVEMENTS

BUILDING ON CONNECTIONS

\$12 billion combined public and private investment in infrastructure enhancements will ensure seamless movement for thousands of new office workers, visitors and residents. A new metro entrance, a world-class transit hub including a pedestrian bridge to Reagan National Airport, and roadways designed for multi-modal transportation will provide unrivaled access.

The additional improvements include a new \$1 billion Virginia Tech Innovation Campus and education campus all inside a park system unparalleled in an urban setting.

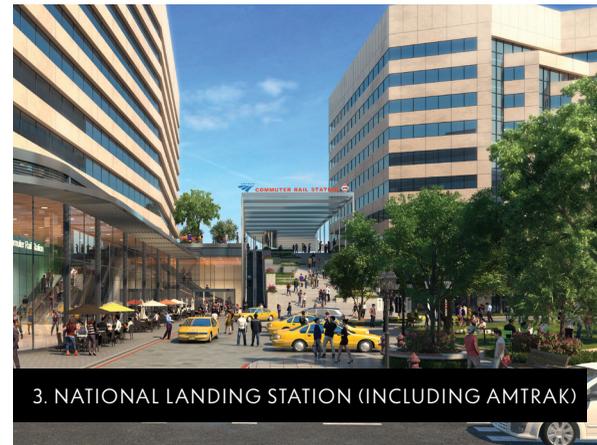
- JBG SMITH Assets
- Amazon
- Future Development Opportunities
- Infrastructure / Education



1. ROUTE 1 BOULEVARD



2. PEDESTRIAN BRIDGE TO REAGAN NATIONAL AIRPORT



3. NATIONAL LANDING STATION (INCLUDING AMTRAK)

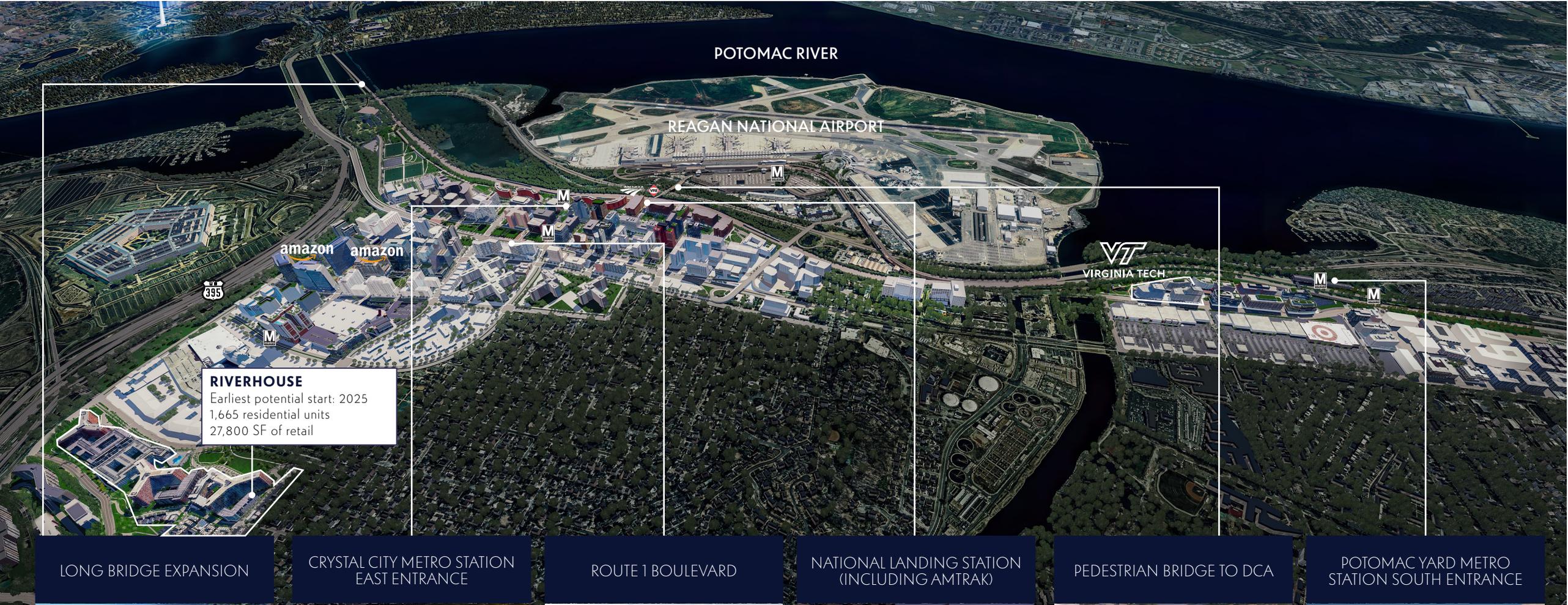


4. VIRGINIA TECH INNOVATION CAMPUS



5. NEW METRO ENTRANCES

\$12B OF PHYSICAL INFRASTRUCTURE IMPROVEMENTS



LONG BRIDGE EXPANSION

CRYSTAL CITY METRO STATION EAST ENTRANCE

ROUTE 1 BOULEVARD

NATIONAL LANDING STATION (INCLUDING AMTRAK)

PEDESTRIAN BRIDGE TO DCA

POTOMAC YARD METRO STATION SOUTH ENTRANCE



NATIONAL LANDING'S LANDSCAPE

TODAY...



2.9 M SF
Retail



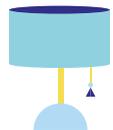
8
Parks & plazas



81K
Office workers within a
2-mile radius



95K
Housing units within a
10-minute drive radius



5.5K
Hotel rooms



\$125K
Median HH income within a
10-minute drive radius

AND TOMORROW.

3.3M SF
Retail

15
Parks & plazas

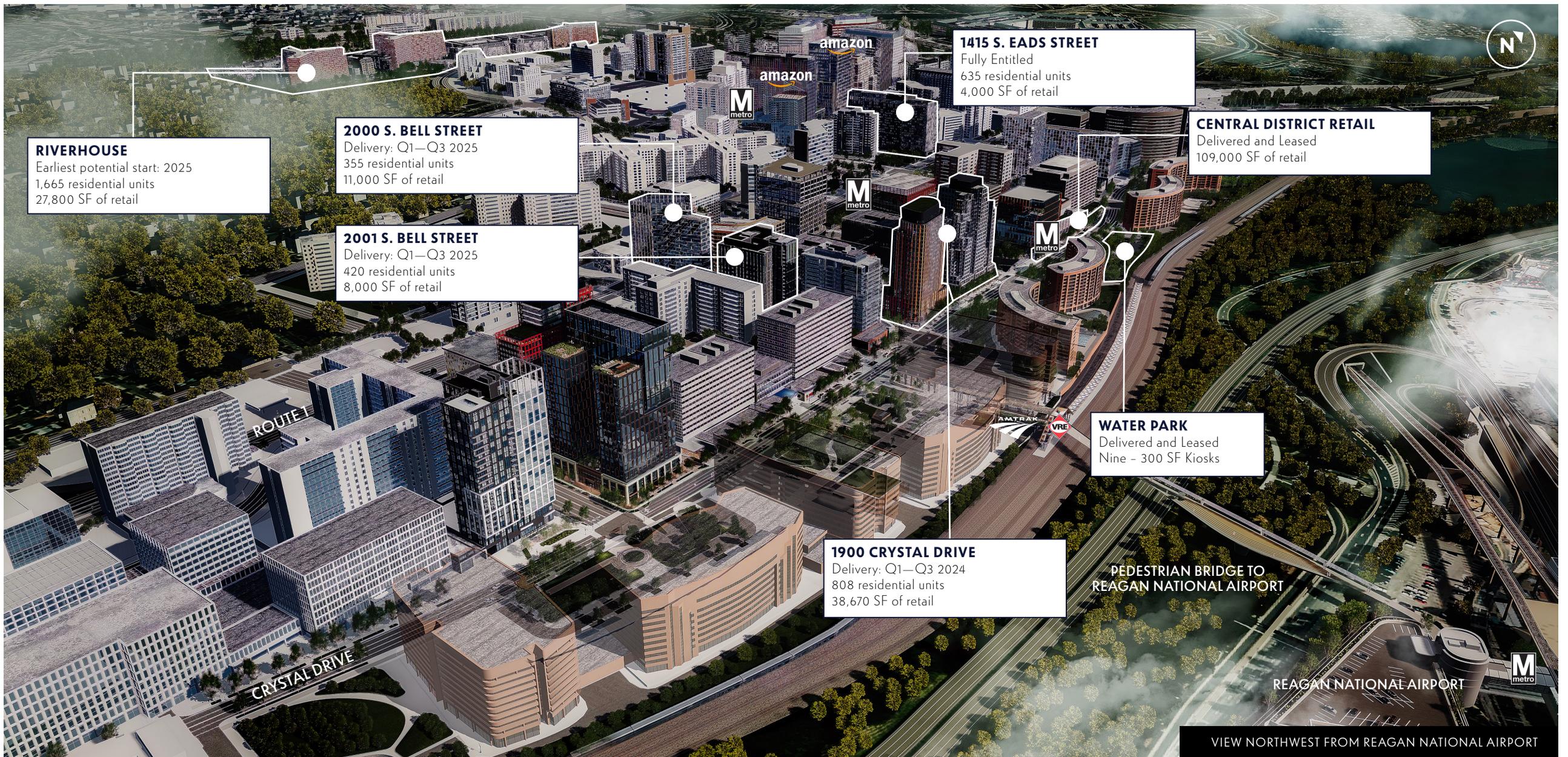
136K-148K
Office workers within a
2-mile radius

\$102K
Housing units within a
10-minute drive radius

5.6K
Hotel rooms

\$150K
Minimum average salary of Amazon
employees; growing at 1.5% annually

NATIONAL LANDING OPPORTUNITIES



RIVERHOUSE

Earliest potential start: 2025
1,665 residential units
27,800 SF of retail

2000 S. BELL STREET

Delivery: Q1—Q3 2025
355 residential units
11,000 SF of retail

2001 S. BELL STREET

Delivery: Q1—Q3 2025
420 residential units
8,000 SF of retail

1415 S. EADS STREET

Fully Entitled
635 residential units
4,000 SF of retail

CENTRAL DISTRICT RETAIL

Delivered and Leased
109,000 SF of retail

WATER PARK

Delivered and Leased
Nine - 300 SF Kiosks

1900 CRYSTAL DRIVE

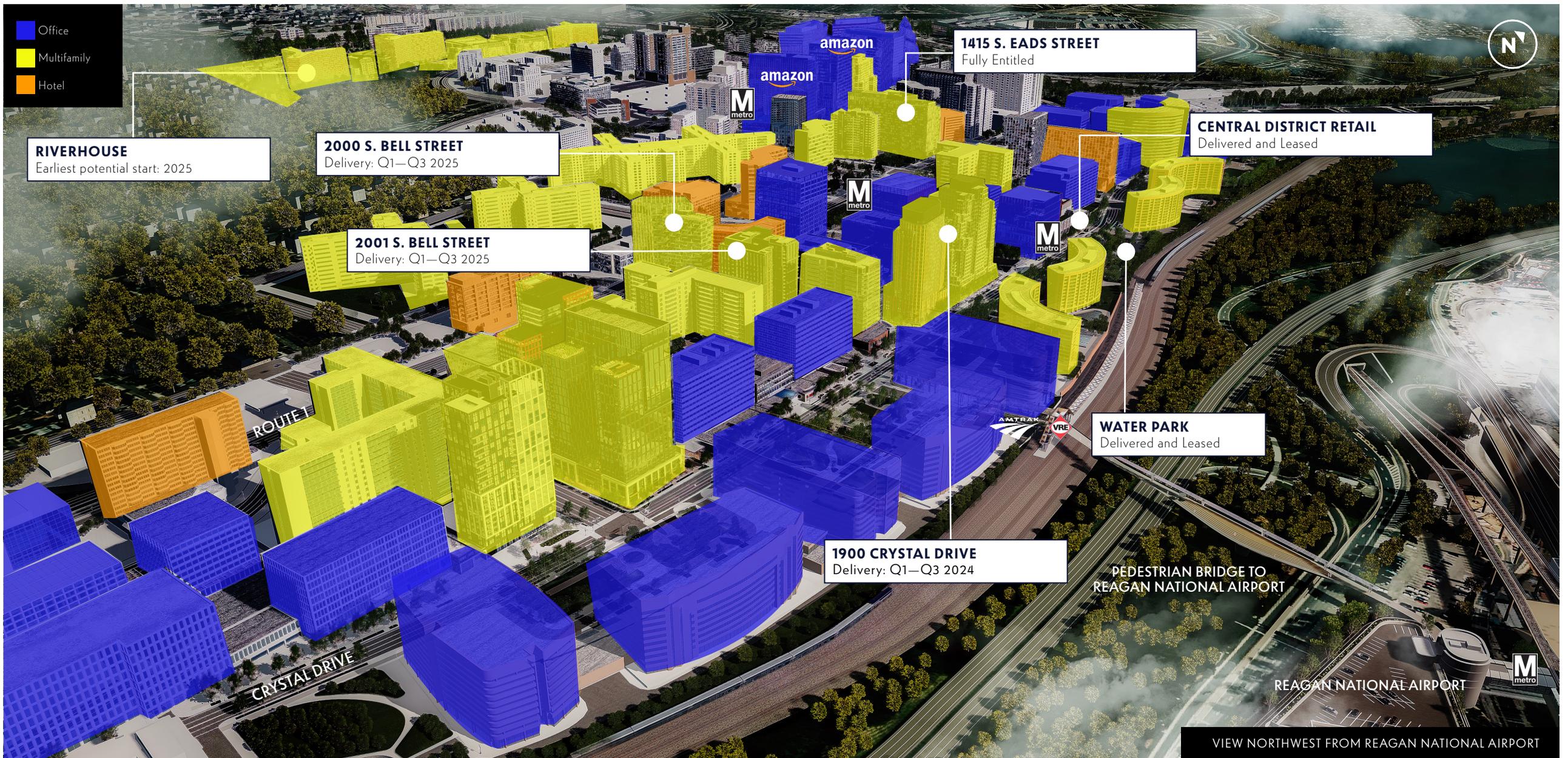
Delivery: Q1—Q3 2024
808 residential units
38,670 SF of retail

PEDESTRIAN BRIDGE TO
REAGAN NATIONAL AIRPORT

REAGAN NATIONAL AIRPORT

VIEW NORTHWEST FROM REAGAN NATIONAL AIRPORT

NATIONAL LANDING OPPORTUNITIES



NATIONAL LANDING OPPORTUNITIES



RIVERHOUSE
Earliest potential start: 2025

AMAZON RETAILERS:

HUSTLE DISTRICT DOGS CONTE'S BIKE SHOP

SOUTH BLOCk CO. GLO 30 PERUVIAN BROTHERS

GOOD COMPANY MAE'S MARKET & CAFE

SOCIAL BURGER WORLD OF CUPCAKES & ART ARLINGTON TOSBY'S MAKERS UNION

Taqueria Kochi Celebree SCHOOL

2001 S. BELL STREET
Delivery: Q1—Q3 2025

2000 S. BELL STREET
Delivery: Q1—Q3 2025

1415 S. EADS STREET
Fully Entitled

CENTRAL DISTRICT RETAIL
Delivered and Leased

CENTRAL DISTRICT RETAILERS:

ALAMO DRAFTHOUSE CINEMA Moh Ze Dahn TACOMBI Ni Hao

amazonfresh CVS pharmacy [solidcore]

WATER PARK
Delivered and Leased

WATER PARK RETAILERS:

TIKI THAI CRUSH PIZZA + WINE Polc Gelati WATER BAR

Queen Mother's BUBBLES BRU Falafel Cafe de Java

CRACKED EGGERY FLOWERS

2100-2200 CRYSTAL DRIVE RETAILERS:

swweetgreen RASA Chick-fil-A

GOOD STUFF EATERY COLD STONE CREAMERY Ted's BOSTON CELLS WE-BREAD

HIGHLINE McCormick & Schmick's

1900 CRYSTAL DRIVE
Delivery: Q1—Q3 2024

1900 CRYSTAL DRIVE RETAILERS:

nailsaloon COLADA SHOP H2 COLLECTIVE TATTE BAKERY & CAFE

Van Leeuwen BAR CHINOIS drybar

REAGAN NATIONAL AIRPORT

VIEW NORTHWEST FROM REAGAN NATIONAL AIRPORT

TRANSFORMATIVE RETAIL



WATER PARK - COMPLETED



MAH ZE DAHR - COMPLETED



CENTRAL DISTRICT RETAIL - COMPLETED



ALAMO DRAFTHOUSE CINEMA - COMPLETED



1900 CRYSTAL DRIVE - UNDER CONSTRUCTION



TACOMBI - COMPLETED



DINING IN THE PARK - COMPLETED

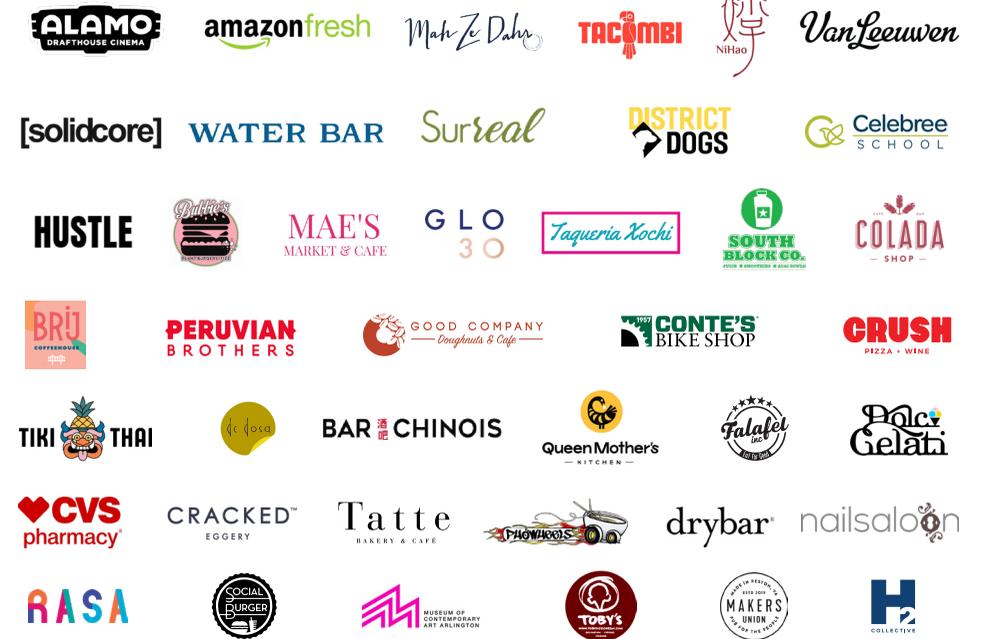


RASA - COMPLETED

35 + **20** = **55**
retailers open by 2023 retailers open by 2024 new retailers

3x **~90%** **~70%+**
street-level retail committed/leased women-and minority-owned

NEW RETAILERS

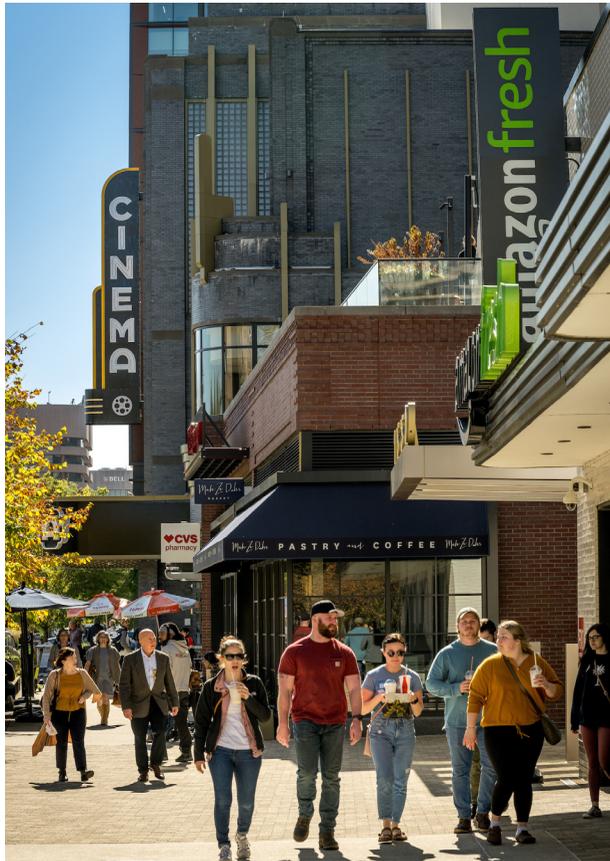


Sampling of new retailers in National Landing



RETAIL LEASING OPPORTUNITIES

LEASING OPPORTUNITIES



CENTRAL DISTRICT RETAIL

COMMERCIAL ASSET

109,000 SF of Retail
Delivered and Leased



1900 CRYSTAL DRIVE

MULTIFAMILY ASSET

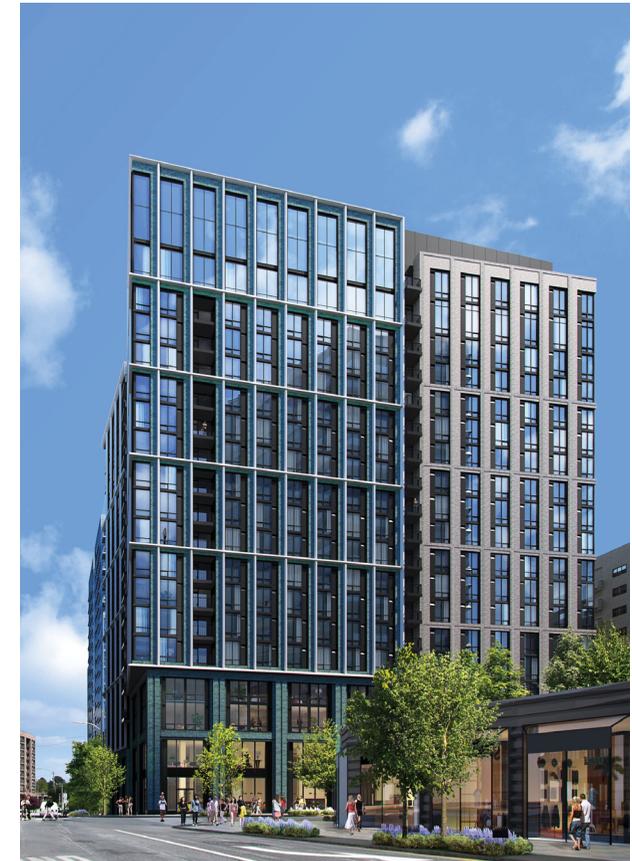
38,670 SF of Retail | 808 Units
Delivery: Q1-Q3 2024



2000 SOUTH BELL STREET

MULTIFAMILY ASSET

11,000 SF of Retail | 355 Units
Delivery: Q1-Q3 2025



2001 SOUTH BELL STREET

MULTIFAMILY ASSET

8,000 SF of Retail | 420 Units
Delivery: Q1-Q3 2025



RETAIL LEASING OPPORTUNITIES

WATER PARK

RETAIL ASSET

Two Restaurant/Bars, Covered Event Stage and Nine 300 SF Food Kiosks
Delivered and Leased



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