

TFWA

WORLD  
EXHIBITION &  
CONFERENCE



**Erik Juul-Mortensen**

President, Tax Free World Association

# Duty Free Shopping

## Duty Free Shopping



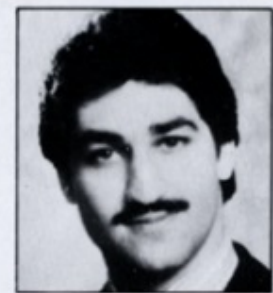


# MEMBERS

Prominent among these from the very beginning is the Association of Suppliers to Airlines, Airports and Shipping (A.S.A.S.) which in the person of its chairman, Mr FURNELL, has given its support and furthered our aims. We have also received help from the federations such as the French Fédération de la Parfumerie and the Distilled Spirits Council of the United States (DISCO) who have given us the opportunity to explain our aims at their meetings. This original group must establish a legal status at the end of the exhibition in October 1985 and the trade must determine the future form and composition of an effective limited working group.



**TOBACCOS**  
Jean-Marie CERRUTI  
PHILIP MORRIS



**TOBACCOS**  
Massoud ESFANDIARY  
R.J. REYNOLDS TOBACCO Int.



**TOBACCOS**  
Han FELSER  
ROTHMANS INTERNATIONAL



**CIGARS**  
Willem MAAS  
WILLEM 11



**COGNAC**  
Patrick de la TAILLE  
MARTELL



**WHISKY**  
Harold AIREY  
JOHN HAIG AND C<sup>o</sup>



**WHISKY**  
Tim MORRISON  
STANLEY P. MORRISON Ltd



**WHISKY**  
Ronnie ANDERSON  
TEACHER AND SONS Ltd



**WHITE SPIRITS  
other than GIN**  
Amanda LOWTHER  
A.L.K.O.



**WHITE SPIRITS  
other than GIN**  
Erik JUL MORTENSEN  
DANISCO Ltd



**WHITE SPIRITS  
other than GIN**  
Alexander KRIVENKO  
PLODIMEX



**U.S.A. PRODUCTS**  
Steven VENABLES  
BRIGADE DISTRIBUTORS



**ACCESSORIES**  
Franco CRUDELI  
GUCCI spa



**WRITING INSTRUMENTS**  
Ian Mc LUSKIE  
A.T. CROSS Ltd



**CONFECTIONERY**  
Alain BONARDO  
NESTLE  
WORLD CORPORATION



**FOOD**  
Charles GENSON  
ROUGIE

# EXECUTIVE COMMITTEE

TAX FREE WORLD EXHIBITION was born of the wish on the part of a group within the trade, to create an exhibition which would truly meet the requirements of the trade. After several information meetings in many different countries, an Executive Committee composed of some 20 suppliers met in Paris in february 1985. In order to reflect the diverse elements and international nature of our trade, various new members joined the Executive Committee until it reached its present strength of 32.



**PRESIDENT**  
Patrick MONIOTTE  
REVILLON



**VICE PRESIDENT**  
Peter FURNELL  
CHAIRMAN, ASAAS



**VICE PRESIDENT**  
Jean-Philippe HAUMONT  
PARFUMS DE  
PRESTIGE INTERNATIONAL



**TOBACCOS**  
D.A. BUSSELL  
GALLAHER  
INTERNATIONAL Ltd



**APERITIFS**  
Carlo CAMPODONICO  
MARTINI E ROSSI



**APERITIFS**  
Claude GUERIN  
S.E.G.M.



**WINE/PORT/SHERRY**  
Peter JARVIS  
HARVEY OF BRISTOL



**COGNAC**  
Emile Alexandre GEORGES  
CAMUS "La Grande Marque"



**ARMAGNAC/CALVADOS/  
EAU DE VIE/LIQUEURS**  
Peter BRANDSMA  
COINTREAU



**BRANDY**  
Neville PLUMMER  
ASBACH AND C<sup>o</sup>



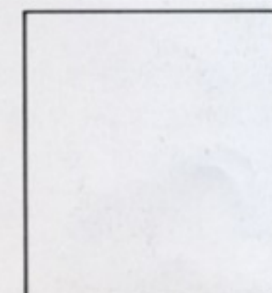
**GIN**  
John BEARD  
JAMES BURROUGH Ltd



**SPIRITS U.K.**  
Jeremy HARVIE  
I.D.V.



**PERFUMES**  
Jean CHERAMY  
CHANEL



**PERFUMES**  
Jean-Louis AUZIERE  
GRES PARFUMS



**PERFUMES**  
Jean de GOURSAC  
ROCHAS



**ACCESSORIES**  
Jacques ANDRE  
JACQUES BENEDICT

# THE GUIDE



**1<sup>st</sup>**  
**TAX FREE**  
**WORLD EXHIBITION**

NICE / FRANCE  
1-4  
OCTOBER 1985



President

**Peter Brandsma**  
Cointreau



Vice President  
Social Affairs

**Jean-Philippe Haumont**  
Haumont International



Vice President  
Financial and Legal

**Ronnie Anderson**  
Teacher and Son



Vice President  
Technical Affairs

**Jean-Marie Cerruti**  
Philip Morris



Vice President  
Marketing and Promotions

**Erik Juul-Mortensen**  
Danisco



Vice President  
Special Projects

**Emile Alexandre Georges**  
Camus La Grande Marque

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# The Duty Free and Travel Retail Global Summit

30 September / 5 October 2018 – Cannes



BUSINESS & EXHIBITION SERVICES, PRESS CENTRE

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WORLD  
EXHIBITION &  
CONFERENCE

The Duty Free and Travel Retail  
Global Summit

30 September / 5 October 2018 – Cannes

BY THE TRADE



FOR THE TRADE













西2进口

天门

天门



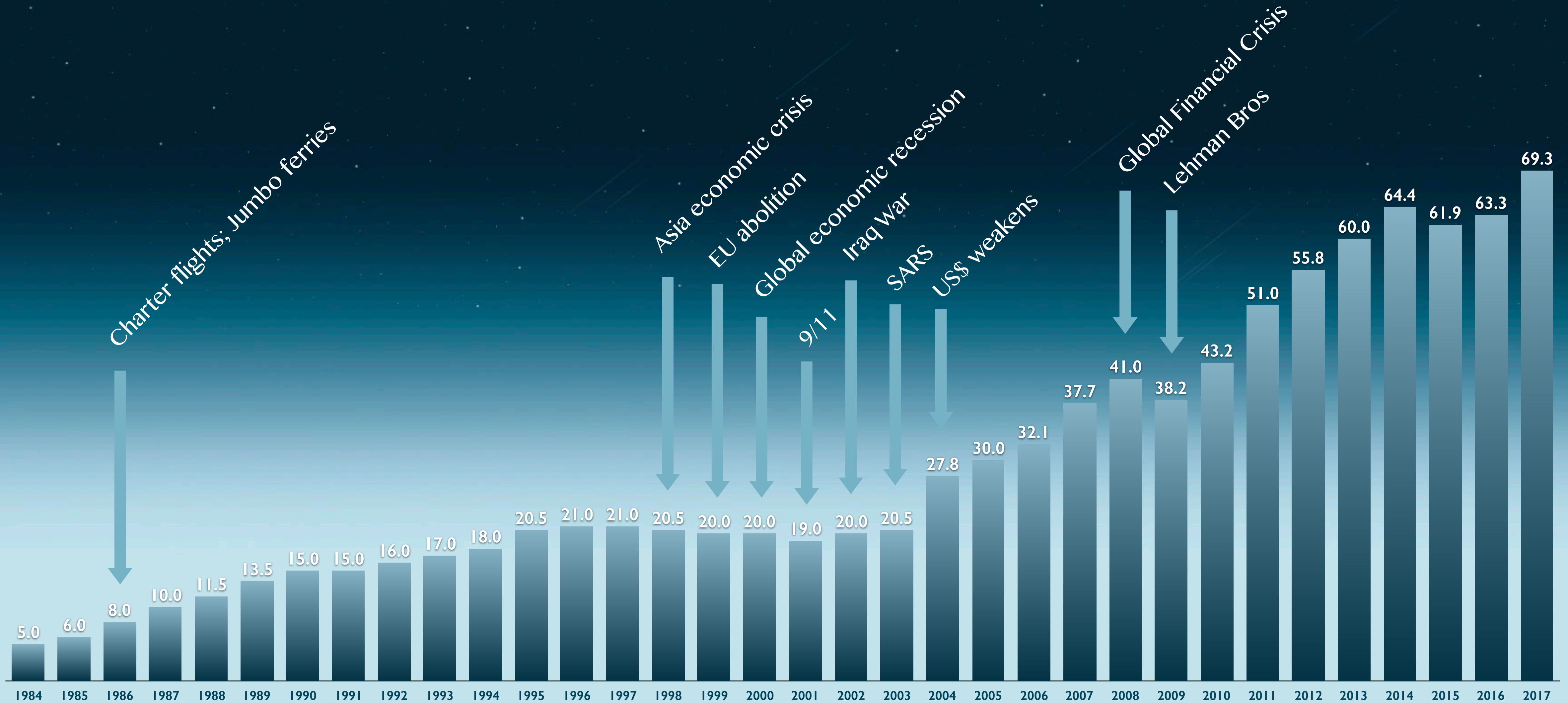
# INTERNATIONAL TOURIST ARRIVALS

2017

**1.32bn**



# DUTY & TAX FREE SALES EVOLUTION (US\$BN)



# GENERATION

RESEARCH



# DUTY & TAX FREE SALES 2017

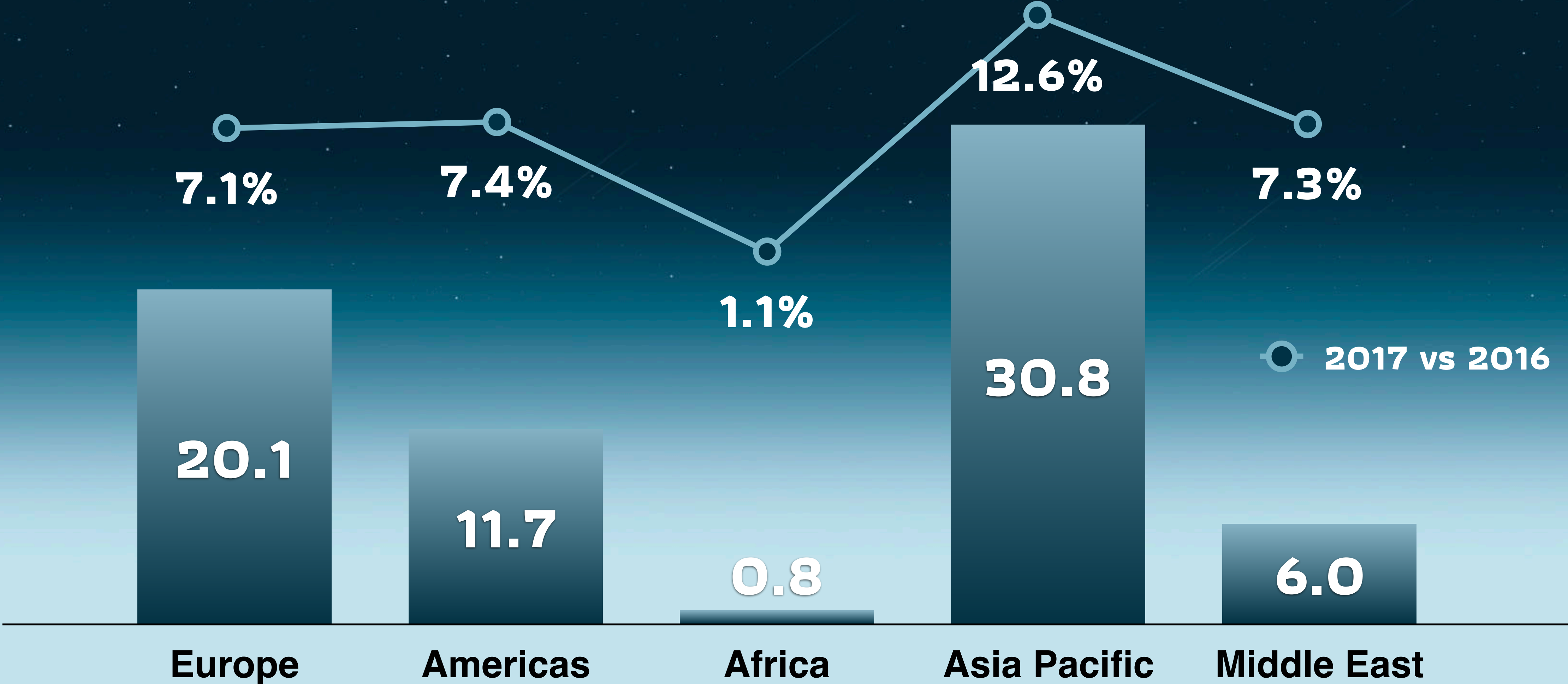
US\$

**69.3bn**

**+9.5% versus 2016**

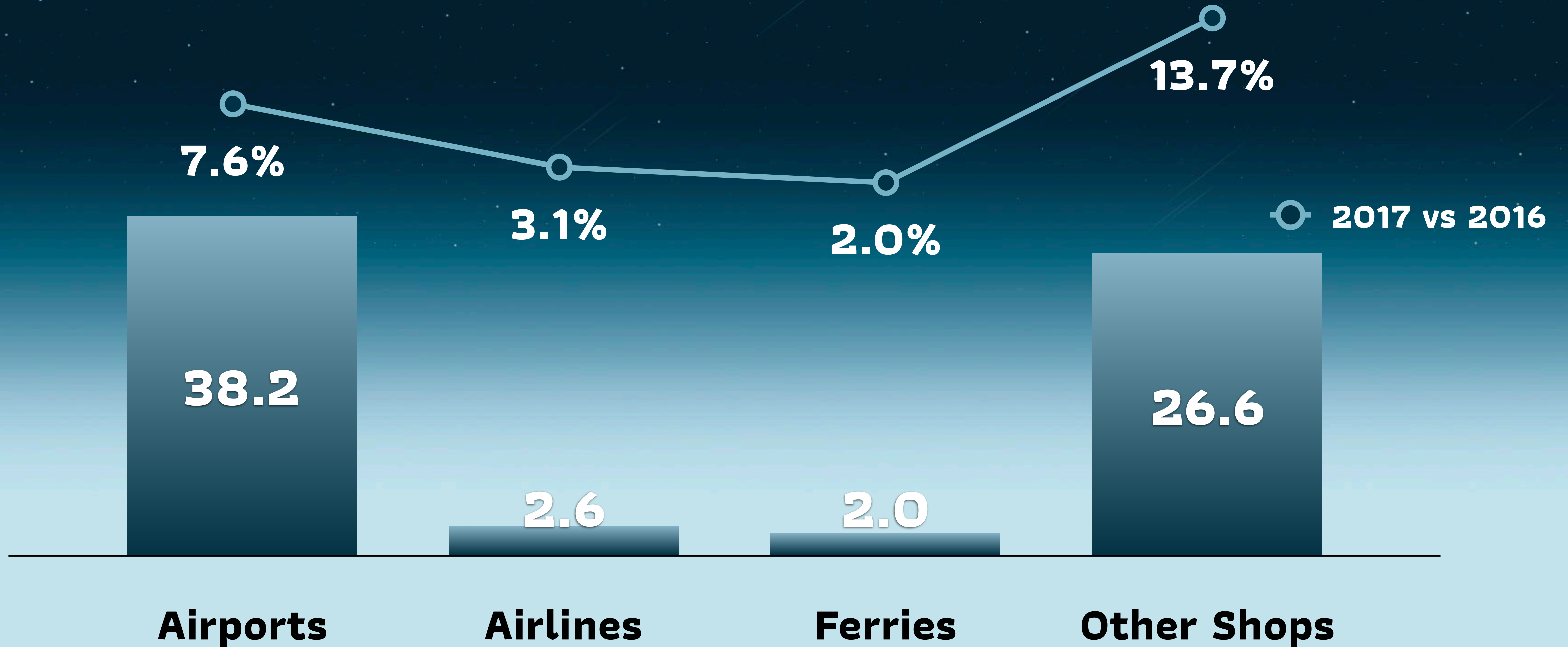


# DUTY & TAX FREE SALES 2017: BY REGION (US\$BN)



Source: Generation Research

# DUTY & TAX FREE SALES 2017: BY CHANNEL (US\$BN)



# INFLIGHT FOCUS WORKSHOP

## UNDERSTANDING TODAY'S PASSENGER

08.00 - 09.00 | Wednesday 3 October | Salon Croisette, Hotel Majestic



**Stephen Hillam**  
Research Director  
Counter Intelligence Retail



**Joe Harvey**  
Senior Manager of Global Boutique  
Retail inMotion

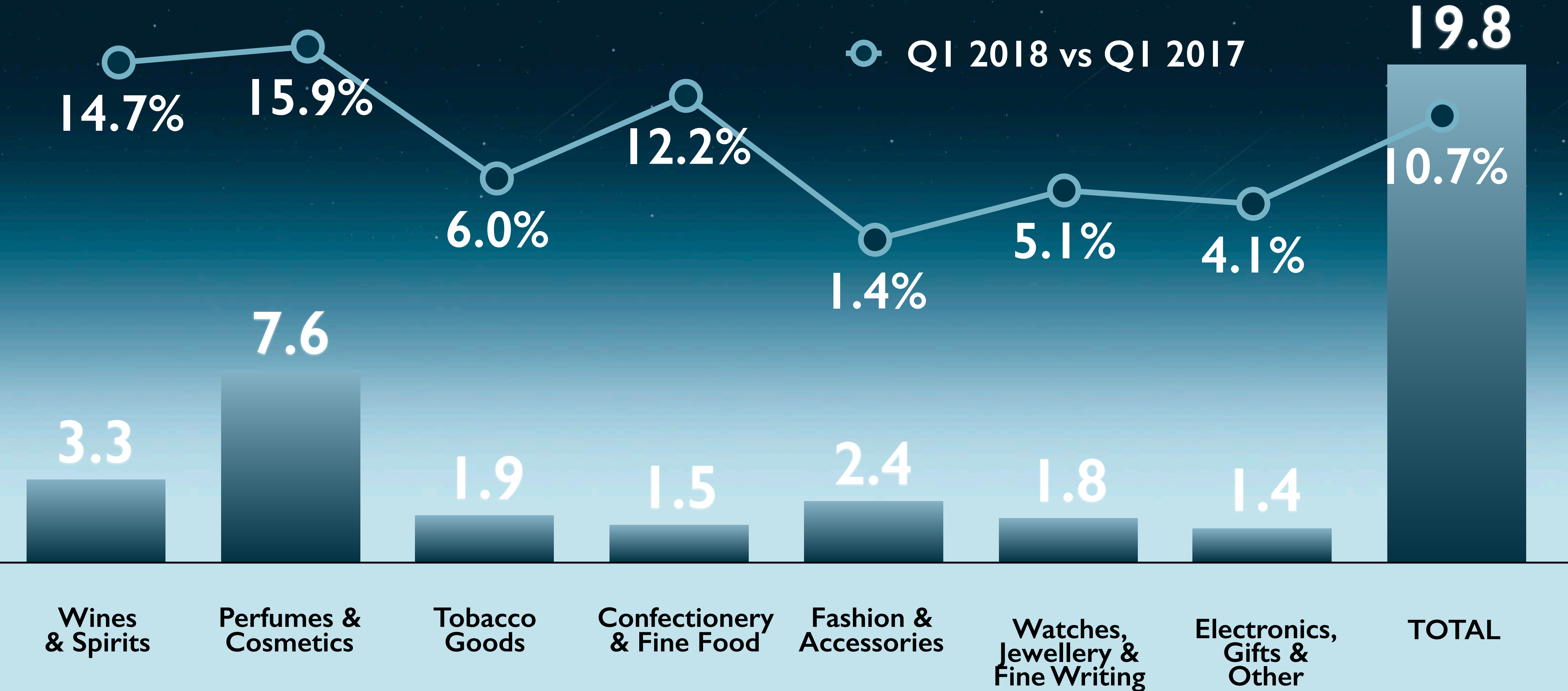


**Thabet Musleh**  
Vice President  
Qatar Duty Free

# DUTY & TAX FREE SALES 2017: BY CATEGORY (US\$BN)



# DUTY & TAX FREE SALES Q1 2018: BY CATEGORY (US\$BN)



Source: Generation Research

WHAT'S NEXT FOR THE  
FUTURE OF TRAVEL RETAIL?



# 1. Growth & Risks to Growth





# GLOBAL URBANISATION

2017

**33**

**Megacities**

2030

**43**

**Megacities**

# GLOBAL AIR FORECASTS

2016

**7.8bn**

**Air passengers**

2040

**21.3bn**

**Air passengers**

# Duty Free Cigarettes & Tobacco

FREE CIGARETTES

Stacks of Marlboro and other cigarette packs on a display stand. The stand has a black base with the word "Tobacco" in white and "Cigarettes" in a smaller font.



A central display stand featuring shelves of Marlboro cigarettes and stacks of tobacco packs. A sign with the word "Duty Free" is visible on the right side of the stand.

Stacks of tobacco packs on a display stand. The stand has a black base with the word "Tobacco" in white.



Shelves stocked with various cigarette packs and tobacco products in the background of the store.

THIS INDUSTRY FACES  
REAL THREATS:

WE MUST DEFEND IT  
TOGETHER!

## 2. Our Industry's Retail (R)Evolution





The logo for TFWA (Travel Finance & Wholesale Association) is a blue square with the letters 'TFWA' in white, bold, sans-serif font.

# CHINA'S CENTURY CONFERENCE

IN PARTNERSHIP  
WITH  
合作伙伴



## SANYA HAITANG BAY 三亚海棠湾

The Premier Duty Free &  
Travel Retail Event in China  
高端免税及旅游零售盛会 中国

Grand Hyatt Sanya Haitang Bay  
三亚海棠湾君悦酒店

5-7 March 2019  
2019年3月5-7日







WHO IS LEADING YOUR  
DIGITAL STRATEGY?

BOOMER, GENERATION X  
OR A DIGITAL NATIVE?



# 3. The Business Model Conundrum

IS YOUR COMPANY  
PLAYING BY TRINITY  
PRINCIPLES?



**Julian Diaz Gonzalez**

CEO  
Dufry



**Susan Whelan**

Senior Executive Vice President  
King Power International  
Group Thailand



**Claus Heinemann**

Co-Owner  
Gebr Heinemann



**Dag Rasmussen**

Chairman and CEO  
Lagardère Travel Retail



# **Anders Fogh Rasmussen**

**Former Prime Minister of Denmark (2001-09)  
and Secretary General of NATO (2009-14)**



# **Dr Bertrand Piccard**

**Adventurer and scientist**





# DUTY-FREE

## IT DOESN'T HAVE TO GO

### FACT

Duty-Free means LOWER ticket prices, MORE choice and 140,000 jobs in Europe.

### FACT

The EU wants to scrap Duty-Free from June 1999.

**CALL THE  
DUTY-FREE HOTLINE  
0800 174109**

# DUTY-FREE. WORTH FIGHTING FOR!

CAMPAIGN TO KEEP INTRA-EU DUTY AND TAX-FREE AFTER 1999  
Together we can save Duty-Free.









**Ask not what your industry  
can do for you, but what you  
can do for your industry**

THANK YOU

# THANK YOU



Danish Distillers

**ABSOLUT.**<sup>®</sup>

V&S Absolut

MAXX<sup>X</sup>IUM

Maxxium Worldwide













70  
YEARS  
OF  
DUTY  
FREE  
1947 — 2017

1-8 OCT. 2017, CANNES  
THE DUTY FREE  
& TRAVEL RETAIL  
GLOBAL SUMMIT



LAPLANDIA  
*Lands of purity*  
SUPER PREMIUM  
VODKA



SKROSS  
SONY  
PHILIPS  
PASCO  
D&B













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Thank you