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CHINA'S CENTURY CONFERENCE

IN PARTNERSHIP
WITH
合作伙伴



ASIA
PACIFIC
TRAVEL
RETAIL
ASSOCIATION

OFFICIAL CO-HOSTS

Department of Commerce /
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海南省商务厅/财政厅



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



ALAIN MAINGREAUD
President
Tax Free World Association



ERIK JUUL-MORTENSEN



The Industry Conference
on China

ORGANISED BY
TFWA BY THE TRADE FOR THE TRADE
www.tfwa.com

“CHINA’S CENTURY”

**THE FAST PACE
OF CHANGE**

IN CHINA DUTY FREE & TRAVEL RETAIL

BEIJING 5th to 7th
March
2013

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WITH
APRA ASIA
PACIFIC
DUTY FREE
RETAIL
ASSOCIATION



Introduction to CDFG



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CHARLES CHEN
President
China Duty Free Group



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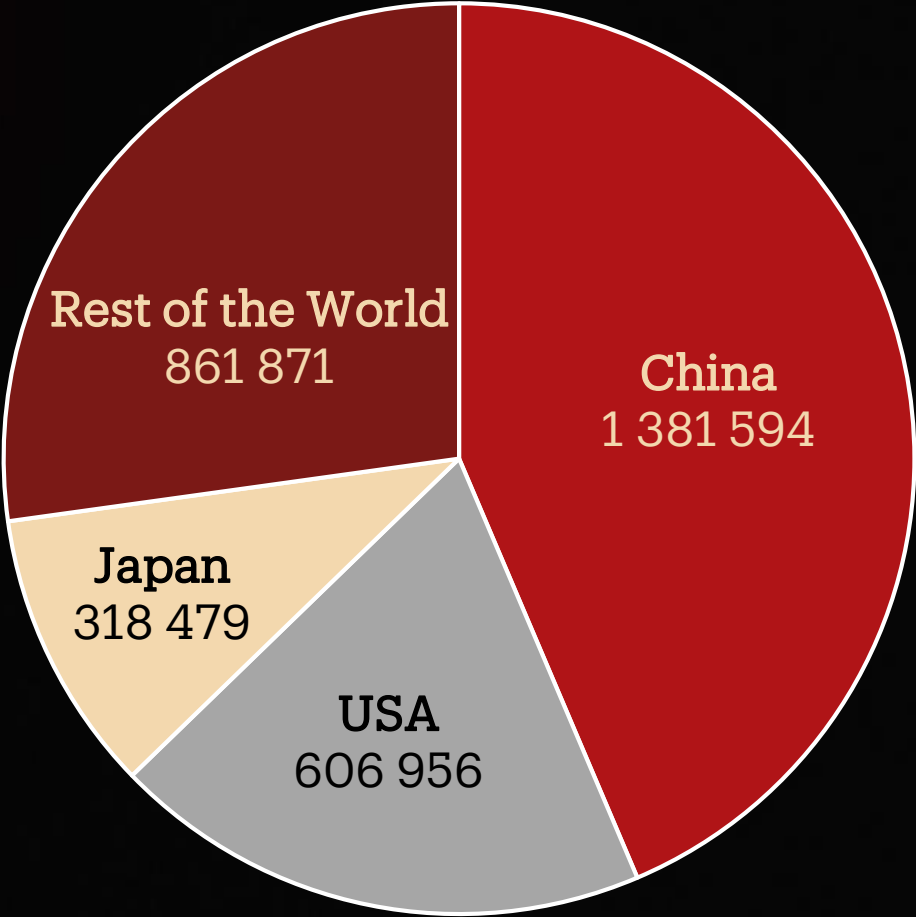
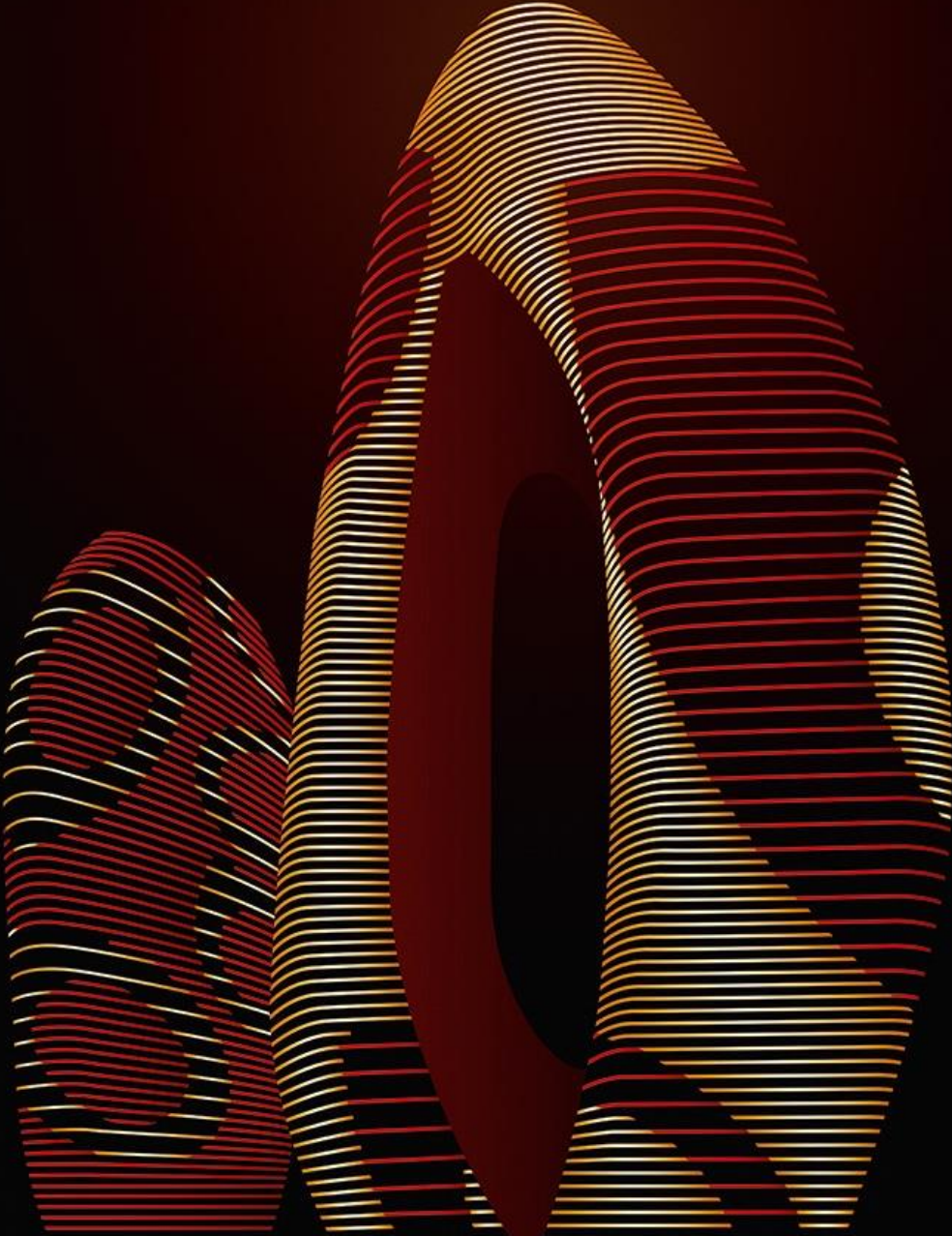


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GLOBAL PATENT APPLICATIONS 2017



Source: WIPO – World Intellectual Property Organization
World Intellectual Property Indicator 2018 Report



DIGITAL VILLAGE

CREATIVE SOLUTIONS FOR TRAVEL RETAIL | 2-5 OCT. 2018

ENTRANCE

GARE MARITIME

TRAVEL



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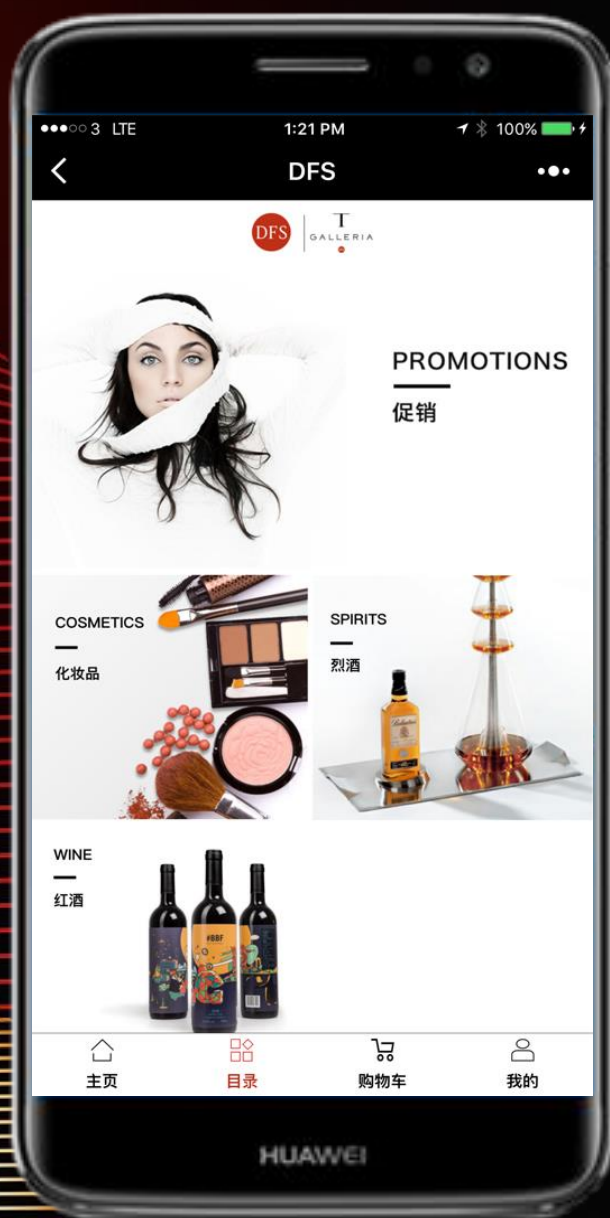
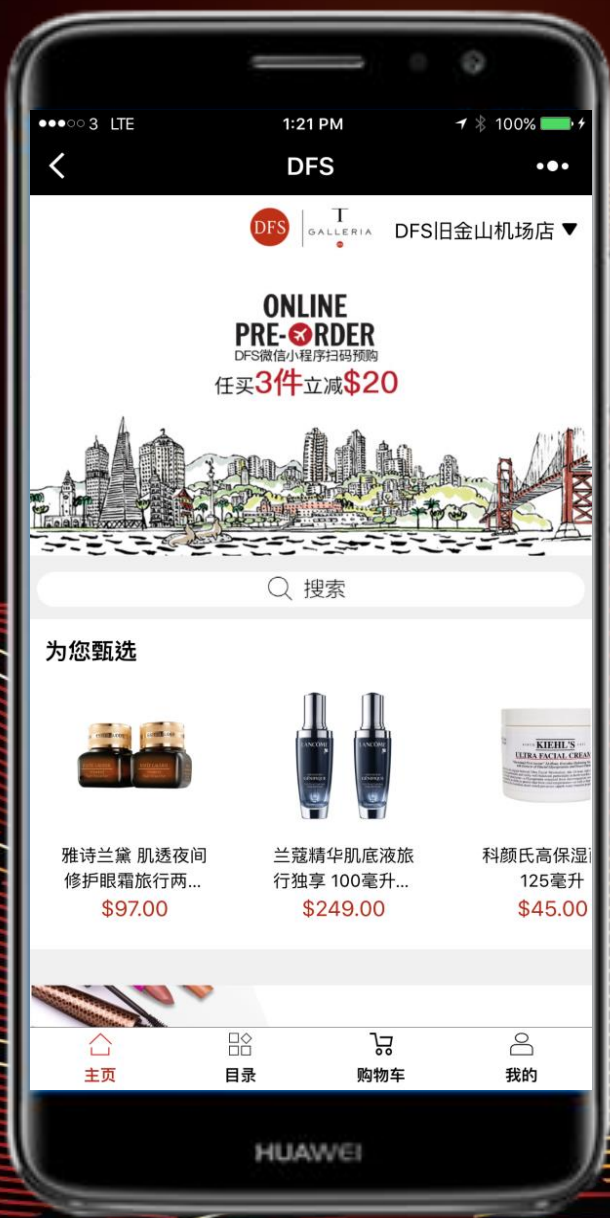
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Understanding the young Chinese duty and tax free retail shopper 2019

A research study



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China's economy

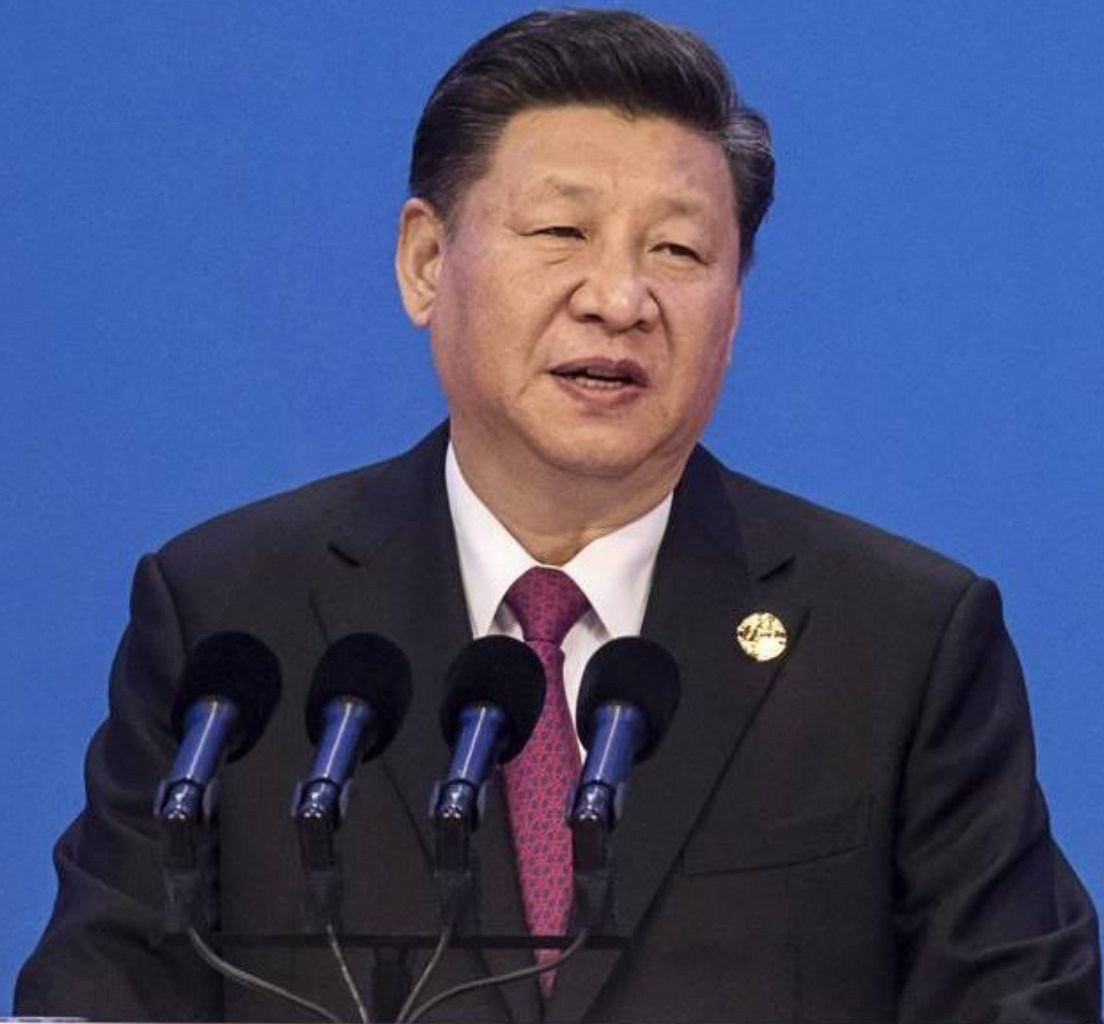
Headlines about China's weak growth are somewhat misleading

Slowness is in the eye of the beholder



Getty Images





博鳌亚洲论坛2018年年会

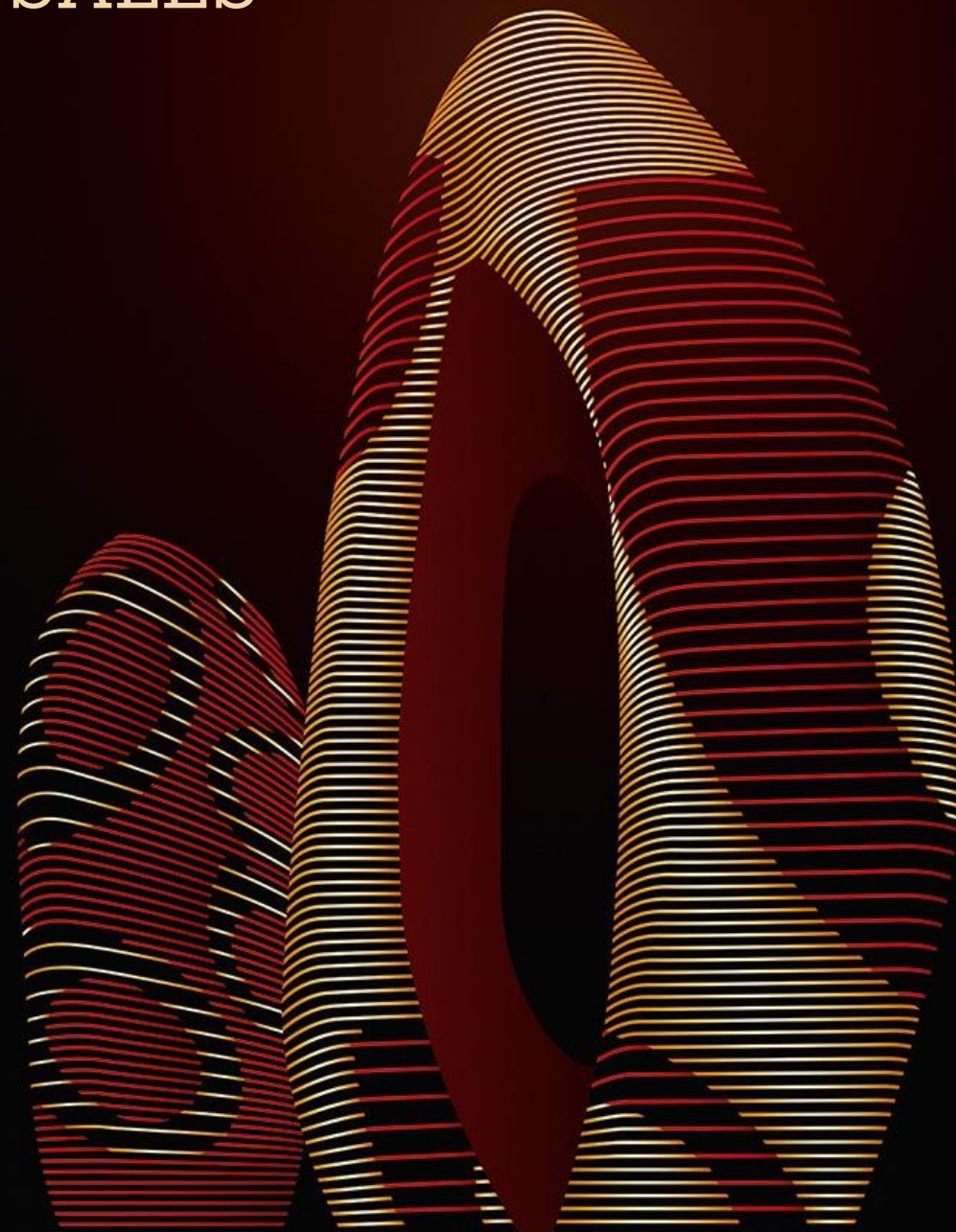
BOAO FORUM FOR ASIA ANNUAL CONFERENCE 2018

DUTY FREE AND TRAVEL RETAIL SALES ASIA PACIFIC - 9M 2018

+14.7%

vs 9M 2017

Source: Generation Research 2018



DUTY FREE AND TRAVEL RETAIL SALES 2017

	SALES 2017 (US\$m)	% CHANGE (VS 2016)
China	5,788	+23.3%
Rest of the World	63,525	+8.4%
<i>Total World</i>	<i>69,313</i>	<i>+9.5%</i>

Source: Generation Research 2018

CHINA DUTY FREE AND TRAVEL RETAIL SALES BY CATEGORY - 2017

	SALES 2017 (US\$m)	% CHANGE VS 2016
Wines & Spirits	990	+16.6%
Fragrances & Cosmetics	2,848	+46.5%
Tobacco Goods	553	-1.8%
Confectionery & Fine Food	296	-5.9%
Fashion & Accessories	483	+10.4%
Electronics, Gifts & Other	232	+2.7%
Watches, Jewellery & Fine Writing	387	+6.7%
<i>China Total</i>	<i>5,788</i>	<i>+23.3%</i>

Source: Generation Research 2018

CHINA DUTY FREE AND TRAVEL RETAIL SALES BY CHANNEL - 2017

	SALES 2017 (US\$m)	% CHANGE VS 2016	2017 MARKET SHARE
Airports	4,321	+22.9%	74.7%
Airlines	106	+48.4%	1.8%
Ferries	< 0.1	NM	NM
Other Shops	1,360	+22.7%	23.5%
<i>China Total</i>	<i>5,788</i>	<i>+23.3%</i>	<i>100%</i>



团体办理乘机手续 EF
Group Check-in

办理乘机手续
Check-in

浦东国际航班值机 H
Pudong International Flights Check-in

火车
Train



OUTBOUND TRAVEL BOOKINGS* FROM GREATER CHINA – JAN-APR 2019

DESTINATION REGION	% CHANGE VS JAN-APR 2018
<i>Worldwide</i>	<i>+9.3%</i>
Africa	+77.8%
Middle East	+43.0%
Americas	-1.3%
Asia Pacific	+6.9%
Europe	+19.0%

* Bookings as of 31st December 2018
Source: Forward Keys 2019



免税品取货处

Duty Free

Golden Holiday

金桂飘香 邂逅新罗

韩国中的韩国文化，最佳的购物体验，
尽在新罗免税店

免税品
共同提货区域
入口

THE SHILLA
duty free

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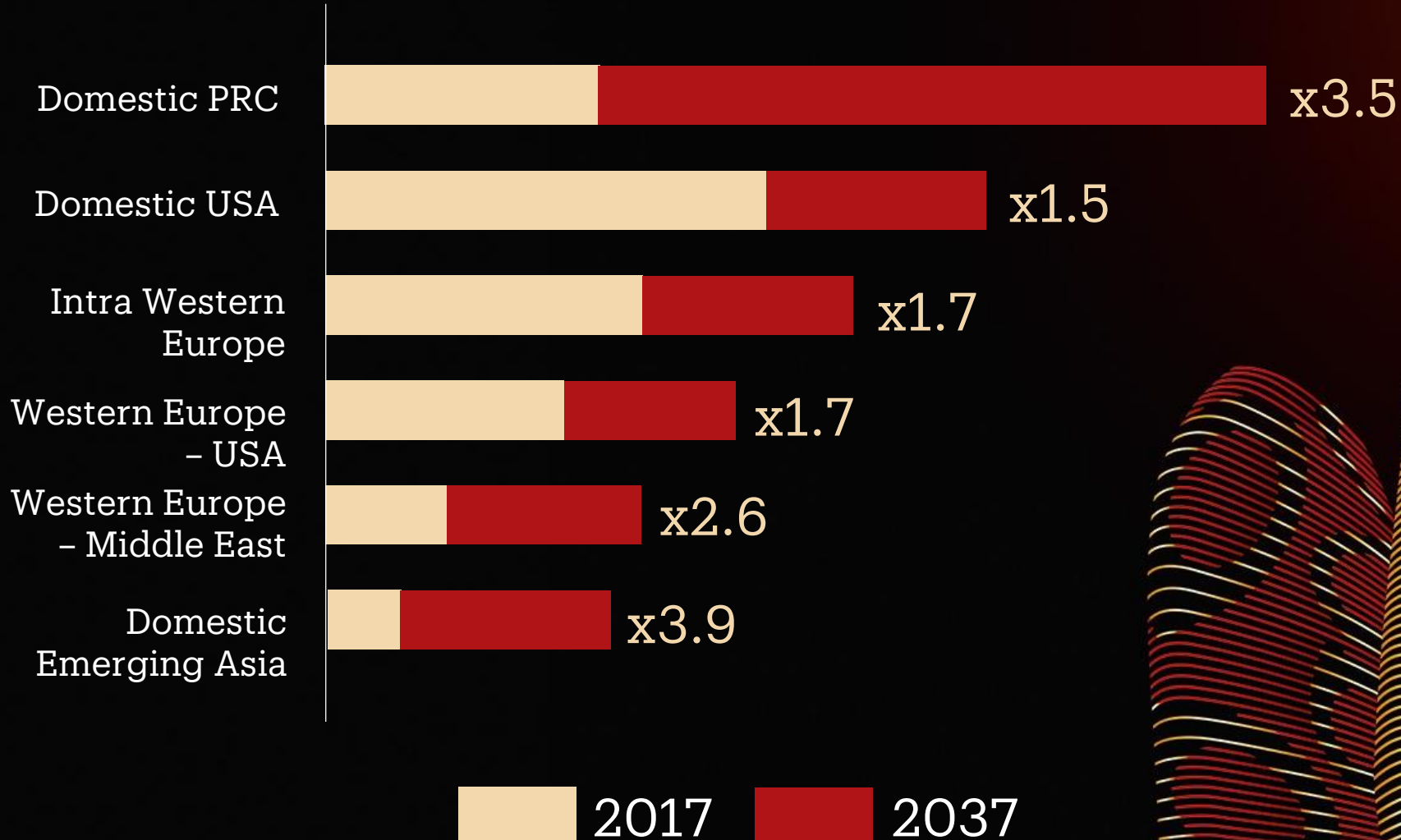
TOP INBOUND TOURISM NATIONALITIES TO GREATER CHINA 2018



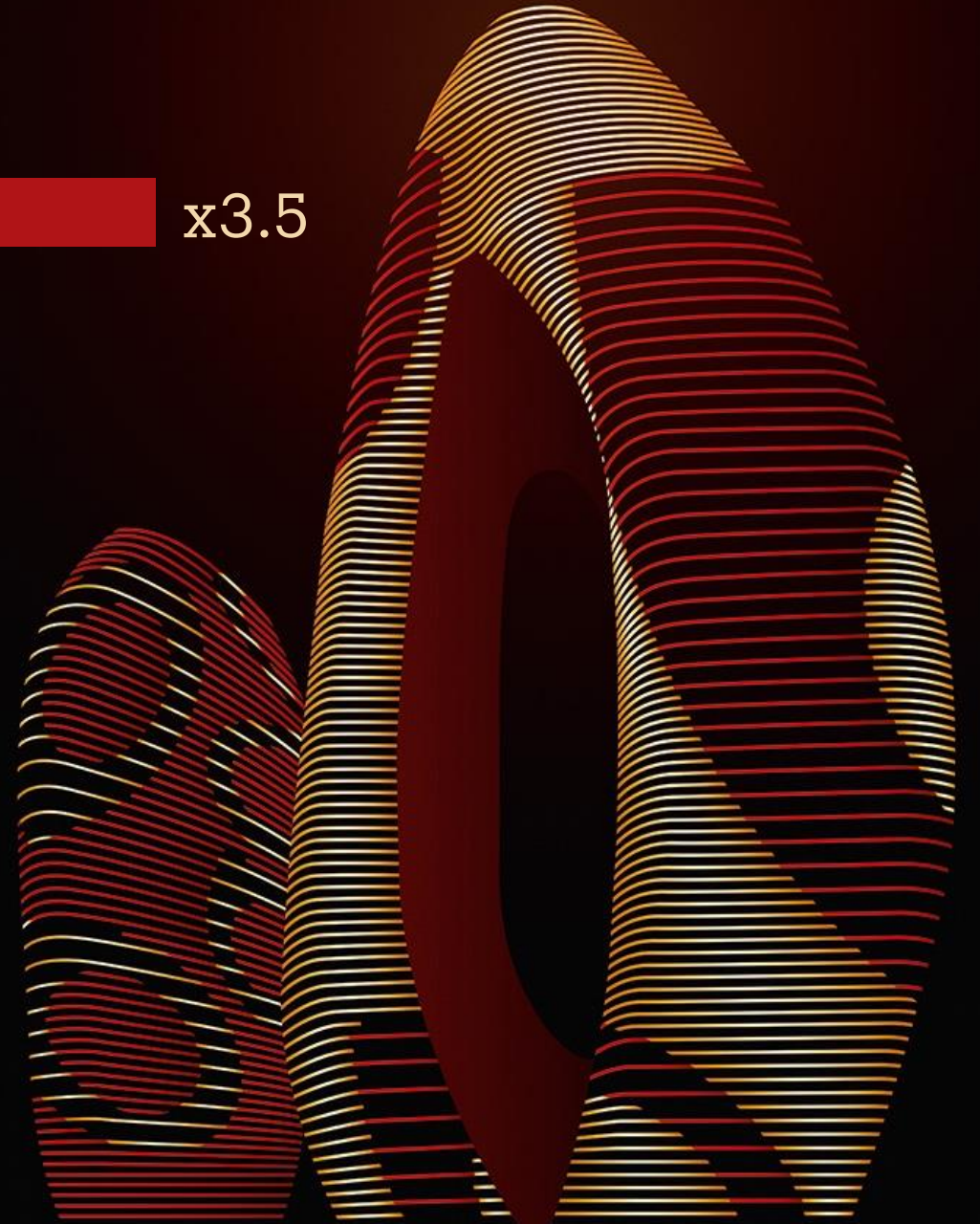
RANK	COUNTRY OF ORIGIN
1	Chinese Taipei
2	South Korea
3	USA
4	Japan
5	Australia
6	Canada
7	Singapore
8	UK
9	Germany
10	Thailand

Source: Forward Keys 2019

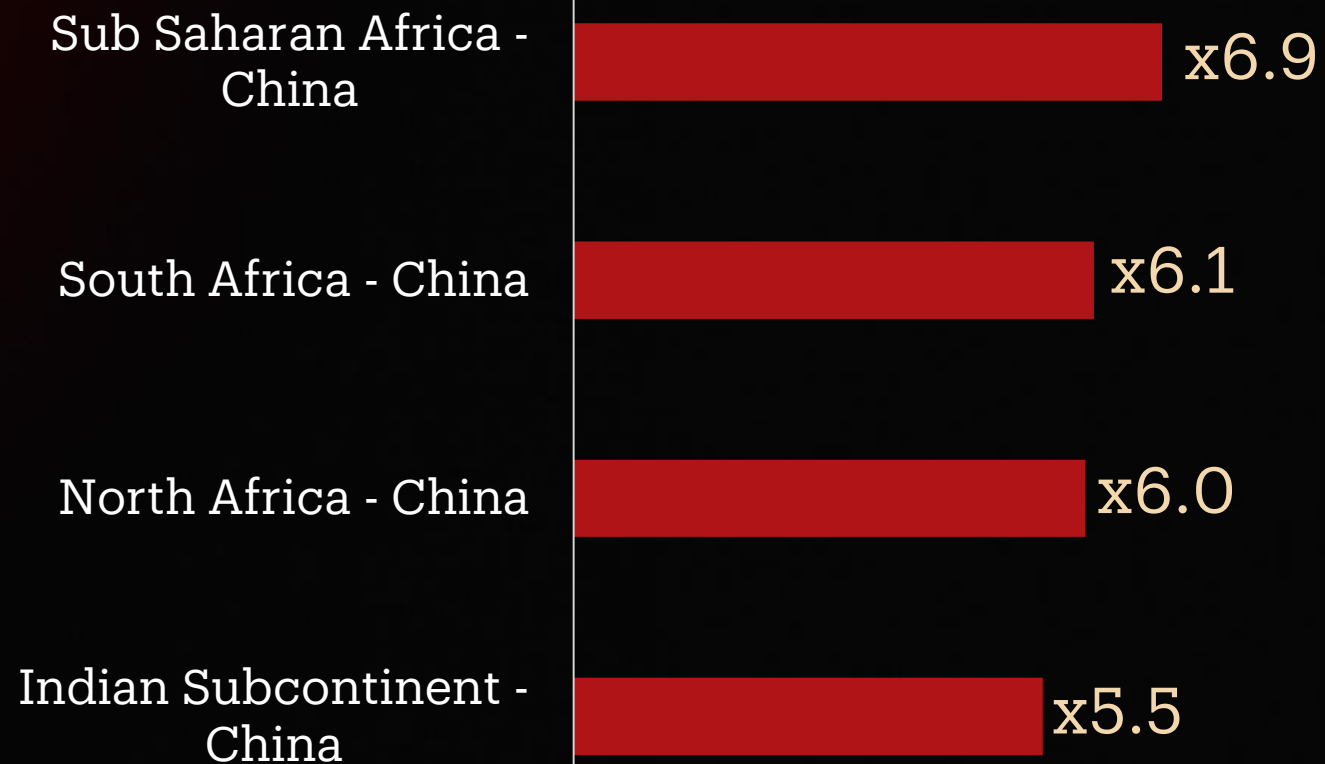
TOP TRAFFIC FLOWS IN 2037



Source: Airbus Global Market Forecast 2018



FASTEST GROWING TRAFFIC FLOWS 2017-2037



Source: Airbus Global Market Forecast 2018

• Home / China / Society

China needs 216 new airports by 2035: report

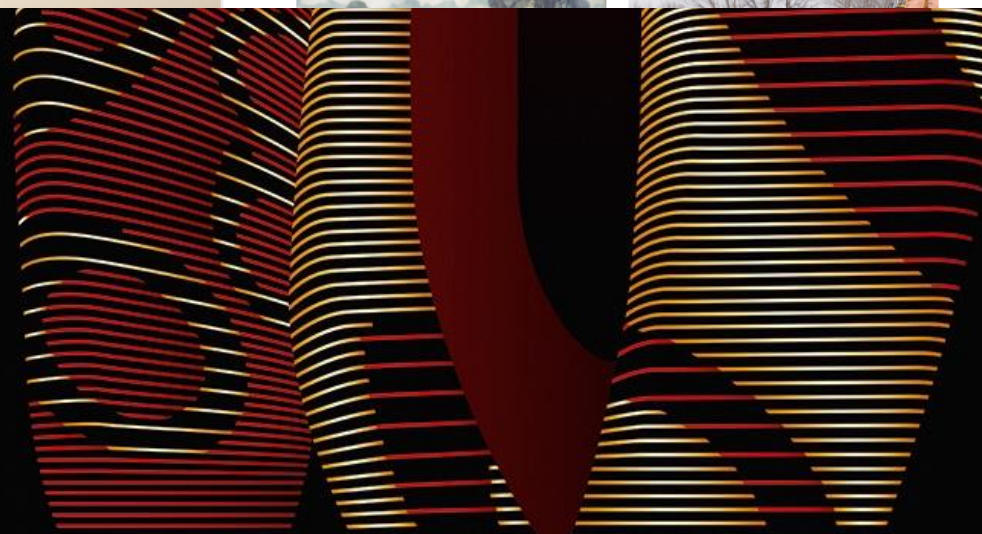
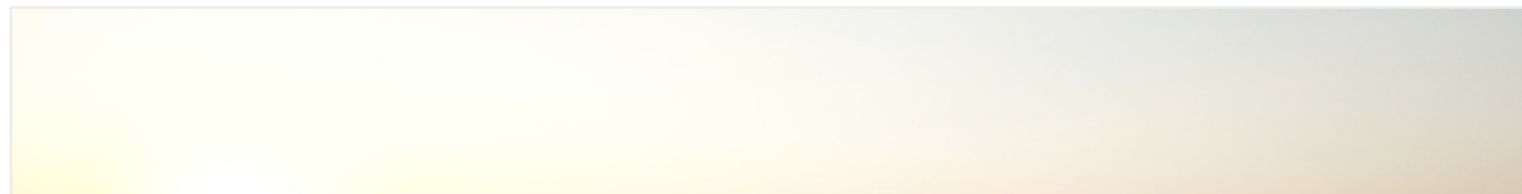
Xinhua | Updated: 2018-12-11 11:29



Xi's Moments
学习时代

Xi meets with trade negotiators

Xi signs order to release regulation on military training supervision







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**ASIA PACIFIC
EXHIBITION &
CONFERENCE**

**THE DUTY FREE
& TRAVEL RETAIL
ASIA PACIFIC SUMMIT**

**SINGAPORE
12 – 16 MAY
2019**



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THANK YOU