



离岛免税2.0继续驱动中国免税业的蓬勃发展

Offshore Duty Free 2.0 Continues to Drive the Thriving Development of China's Duty Free Industry

Jason Cao,
Founder of DFE

General Manager of Amberich International



About DFE & DFE Founder



Mr. Jason Cao, Founder of DFE

MBA, Founder of "DutyFreeExpert" (DFE)

Managing Director, Amberich International (HK) Ltd

Mentor of School of Management, Fudan University

Visiting Professor, Sanya Aviation Tourism Vocational College

Executive Director of the Securities Investment Club, School of Management, Fudan University

Jason has 26 years of experience in the duty-free industry, worked for British American Tobacco, Imperial Tobacco, Sunrise Duty Free Group and have been working for Amberich International (HK) Ltd as Managing Director for 9 years. During the 12 years of working in Sunrise Duty Free Group, Jason was mainly responsible for the merchandising and procurement of perfume and cosmetics for Sunrise Duty Free Shanghai Airport and Beijing Airport. His work scope covers merchandising and procurement of tobacco, alcohol, perfume and cosmetics; brand marketing; procurement system research and development; retail space design; industry conferences; staff recruitment and training etc.

Jason founded Amberich International (HK) Ltd. in 2013 to engage in management consulting, project operation, integrated marketing, retail space design, brand agency/distribution, recruitment and training etc. in the travel retail (duty-free) industry. Jason found the WeChat public account DutyFreeExpert (DFE) and has been operating it for 8 years. It is the most influential media in China's duty-free and travel retail industry with 25,000+ precision industry followers. DFE has long term partnership with TFWA, WDFC, MoodieDavittReport etc industry associations and medias.

As the chief editor of DFE and a researcher of duty free industry, Jason is a high frequent speaker and consultant in travel retail industry, investment sector and education industry in China.

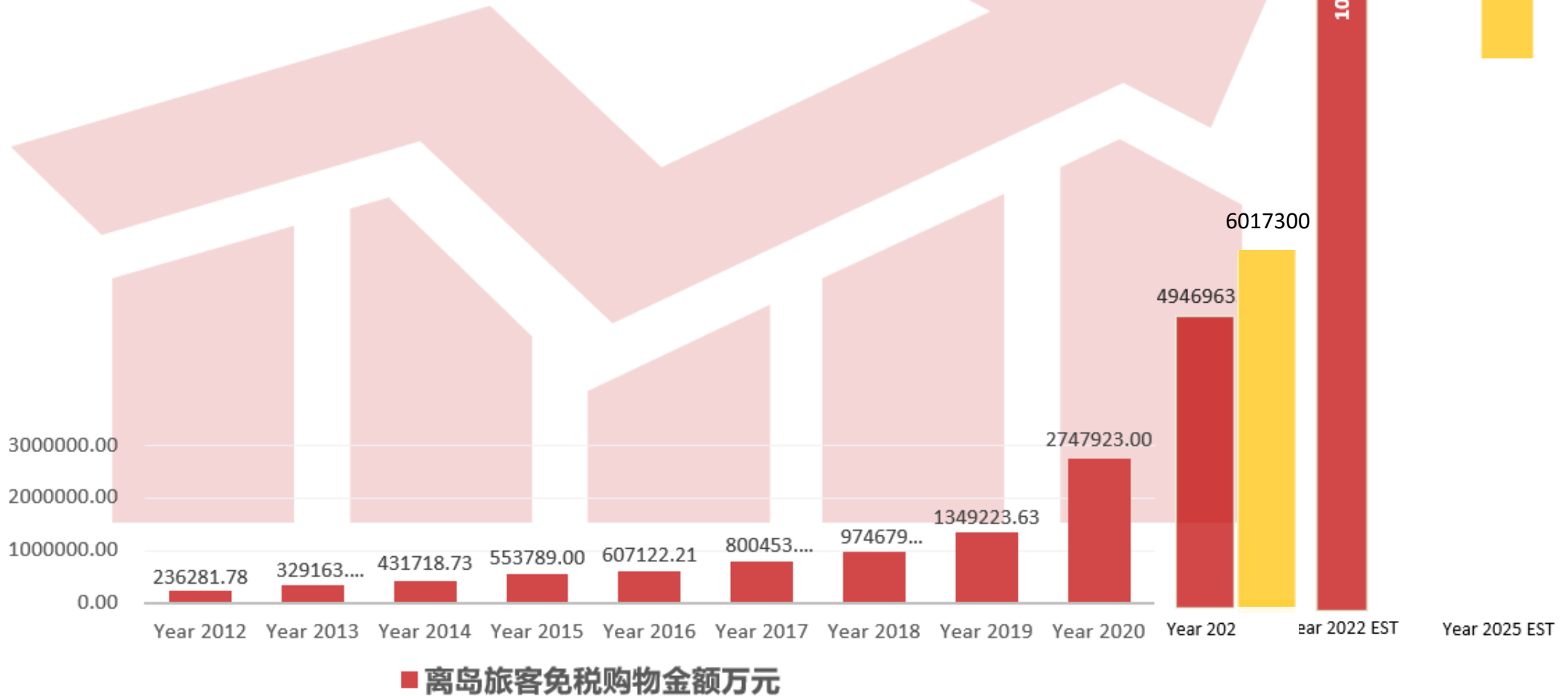
Contact DFE Assistant via WeChat: DFE007; Contact Jason via email: Jason@idutyfree.cn

- 26 years working experience in duty free industry
- 12 years as merchandising head in Sunrise Duty Free, managing 65 suppliers total 120 brands
- As the Founder and Chief Editor of DFE for 9 years with 26000+ industry followers.



1. Overview of Offshore Duty Free Performance 2021, 2022

Hainan Offshore Duty Free Sales Result Year 2012-2021 (10 thousand)

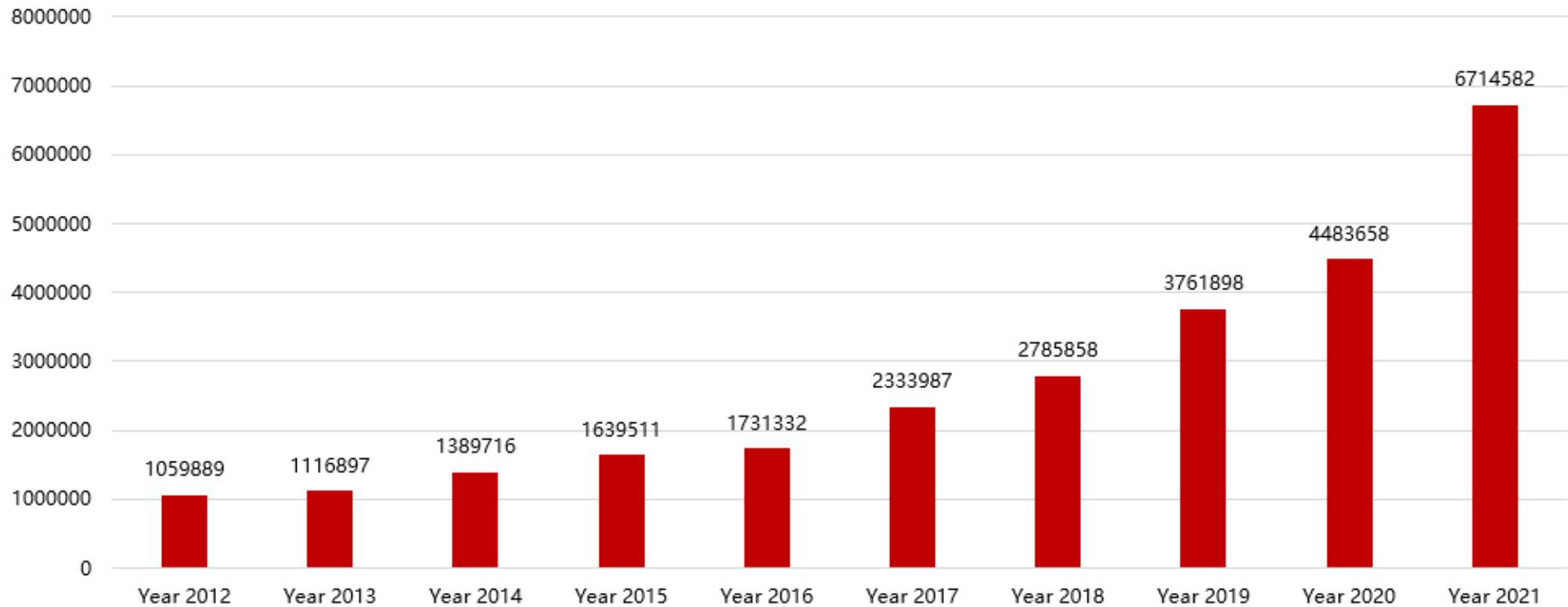




1. Overview of Offshore Duty Free Performance

Offshore Duty Free Traveler Purchase Frequency 离岛免税实际购物人次

671万

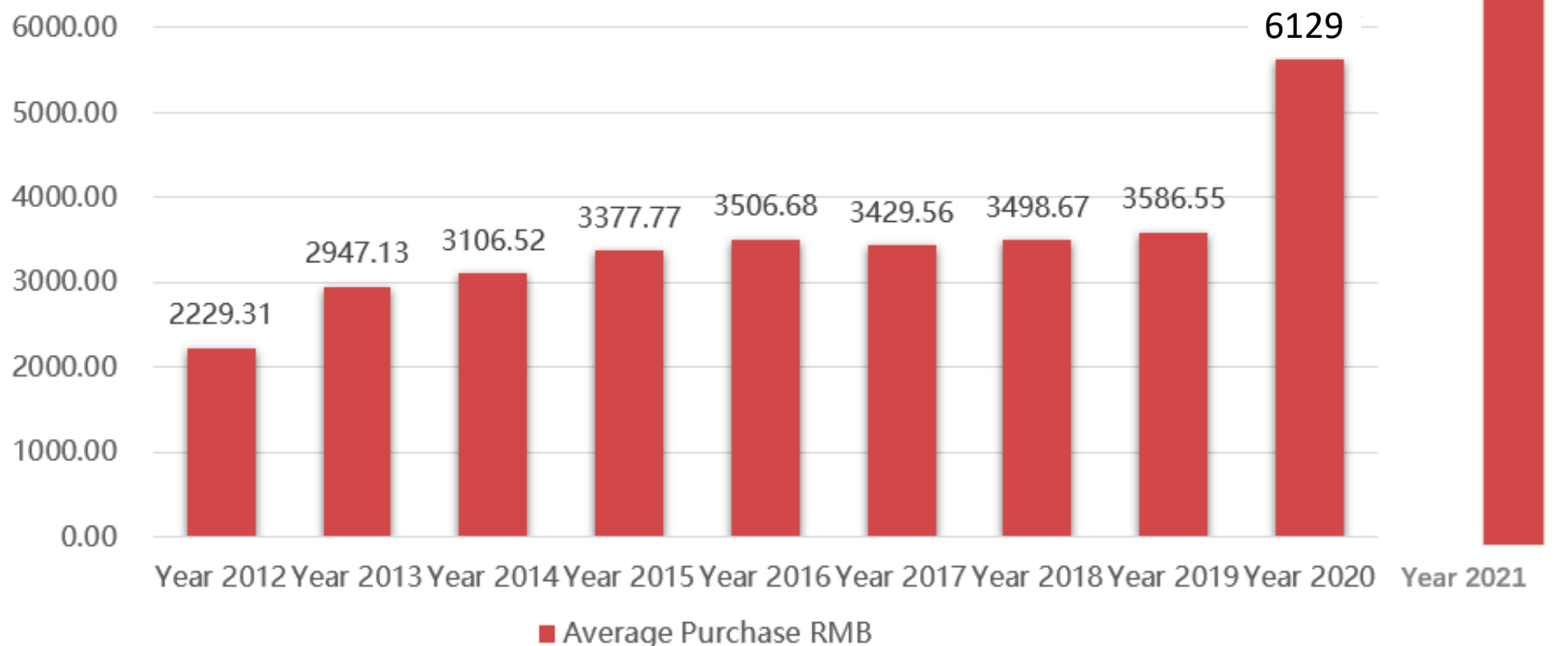




1. Overview of Offshore Duty Free Performance

7368

Average Purchase (RMB)





1. Overview of Offshore Duty Free Performance



CDF 5 shops contribute 90% of duty free sales Hainan in 2021



1. Overview of Offshore Duty Free Performance, 2022 Up to March 23

According to the latest data released by the Hainan Provincial Department of Commerce, from January 1 to March 23, the sales of offshore duty-free shops exceeded USD2.36 billion, YOY continue to increase.

海南省商务厅公布的最新数据显示，1月1日-3月23日，海南离岛免税店销售额超150亿元，同比实现增长。

2. What does Offshore Duty Free 2.0 mean?





2. What does Offshore Duty Free 2.0 mean?

免税店	运营主体	最新进展
海口美兰机场免税店	中免集团	T1航站楼, 2011年12月21日投入运营, 总营业面积8613平方米; T2航站楼免税店, 经营面积9313平方米, 于2021年12月2日开业, 开业面积4890平方米。
三亚国际免税城	中免集团	该店位于三亚海棠湾, 于2014年9月1日正式开门营业, 总建筑面积约12万平方米, 商业面积达7.2万平方米, 是全球规模最大的单体免税店。
海口日月广场免税店	中免集团	2019年1月19日开业, 首期开业面积1.3万平方米, 二期2019年6月1日开业, 开业面积9000平米, 经营面积共2.2万平方米。
琼海博鳌免税店	中免集团	2019年1月开业, 位于琼海博鳌亚洲论坛景区内, 经营面积4200平方米。
三亚海旅免税城	海南旅投免税品有限公司	2020年12月30日正式开业, 营业面积9.5万m ² , 其中零售空间共约5万平米。
中服免税三亚国际免税购物公园	中国出国人员服务总公司	总面积近4万平米, 于2020年12月30日正式开业。涵盖香水化妆品、珠宝首饰、箱包皮具、服装服饰、手表钟表、酒类、3C数码、运动户外、大健康等品类。
三亚凤凰机场免税店	中免集团	2020年12月30日正式开业, 总面积约6800m ² , 首期面积约800m ² , 开设了电商体验区、产品展示区。
海口观澜湖免税城	深圳免税集团	位于海口观澜湖度假区, 规划总营业面积10万平方米, 于2021年1月31日正式开业, 目前一期营业面积2万平方米, 共有400多个国际品牌入驻。
海控全球精品(海口)免税城	海南省发展控股有限公司	位于海口日月广场东区, 总建筑面积38920平米, 一期3260平米, 于2021年1月底开业; 二期3万平米, 2021年8月30日开业, 三期6250平米, 目前正在筹建中。
海口国际免税城	中免集团	项目规划总建面约92.6万平方米, 为综合体项目, 涵盖免税商业、有税商业、办公、酒店、人才公寓等, 其中地块五为免税商业中心, 建成后将成为全球最大单体免税城, 预计2022年开业。



2. What does Offshore Duty Free 2.0 mean?

- ◆ More supplying partners
- ◆ More brands coming to present at Hainan offshore duty free market.
- ◆ More space (Haikou Intl Duty Free Plaza)
- ◆ Image upgrading.
- ◆ Multi-role of retailers
- ◆ Multi-sales channels (online & offline)
- ◆ Multi-marketing channels (online & offline)
- ◆ Digitalize is the key strategy to every retailer and brand in China.
- ◆ Islanders' duty free

2. What does Offshore Duty Free 2.0 mean?

- CDFG strives to build the world's largest single duty-free city - Haikou International Duty Free City (926k SQM)

- Expected to open in 2022.





2. What does Offshore Duty Free 2.0 mean?

DIOR

BRUNELLO CUCINELLI

JAEGE-LECOULTRE

—1829—
DELVAUX

Cartier

KENZO
PARIS

CHAUMET
PARIS

LANVIN
PARIS

Bonpoint
PARIS

DE BEERS
JEWELLERS

GIVENCHY

IWC
SCHAFFHAUSEN

clé de peau
BEAUTE

ARMANI
beauty

LANCASTER

Kitian

ULYSSE NARDIN

MOSCHINO



BALMAIN
PARIS

EDITIONS DE PARFUMS
FREDERIC MALLE

GP
GIRARD-PERREGAUX

Brand New Shop, Event, or promotion during Jan – Feb, 2022



2. What does Offshore Duty Free 2.0 mean?

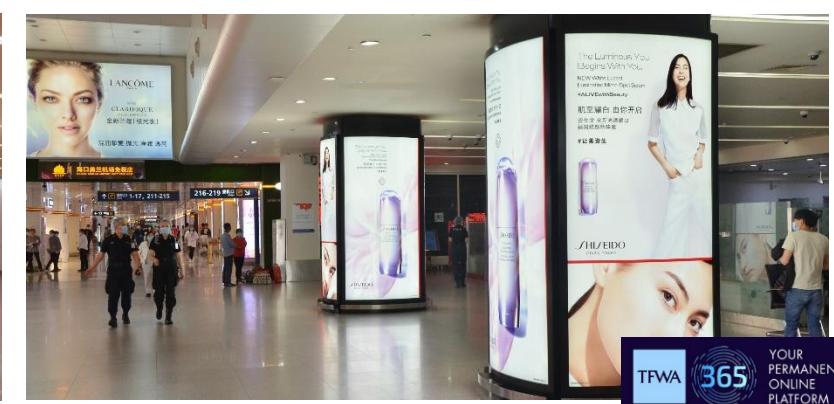


Online sales and marketing channel development



2. What does Offshore Duty Free 2.0 mean?

Airport Brand Advertisement March 2022, from Asiaray



2. What does Offshore Duty Free 2.0 mean?



Shanghai Hongqiao Airport Domestic Area Luxury Boutique



2. What does Offshore Duty Free 2.0 mean?

Introduce 200 international brands within 3 years, develop port duty-free shops, and explore the establishment of duty-free shops in the city
Departure tax refund processing points will be set up in Guangzhou North Railway Station Business District (T4 Terminal Building)
Explore the construction of air-rail combined transport bonded exhibition experience and shopping duty-free complex at Guangzhou North Railway Station
On April 27, 2021, CTS Investment won the two parcels of Guangzhou North Railway Station with 8.395 billion yuan to build the first duty-free commercial, cultural and tourism complex in the Guangdong-Hong Kong-Macao Greater Bay Area.

3年内引入200个国际品牌，发展口岸免税店，探索设立市内免税店

广州北站商务区（T4航站楼）设置离境退税办理点

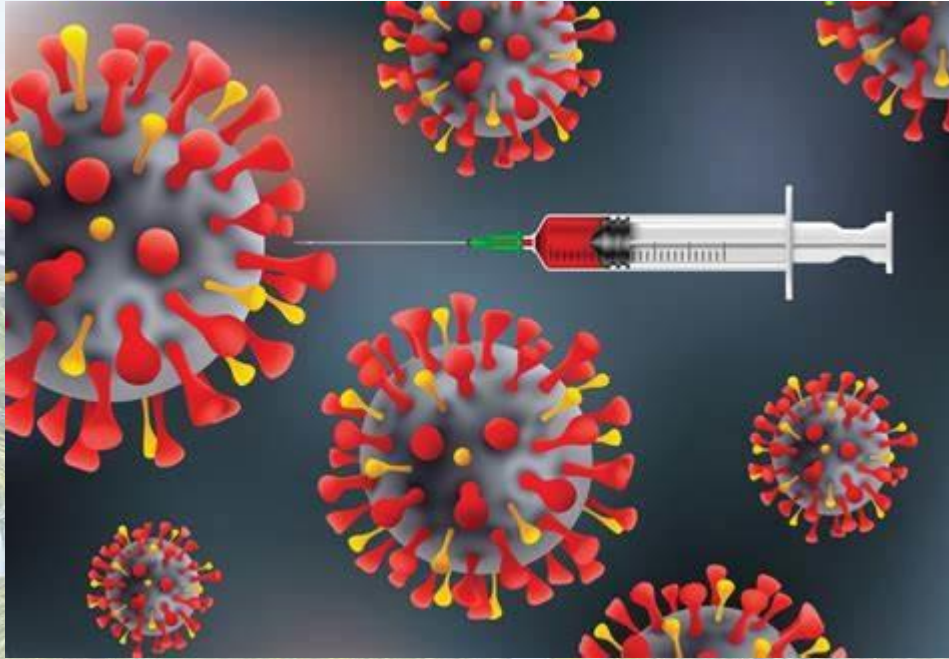
探索在广州北站建设空铁联运保税展示体验和购物免税综合体

2021年4月27日，中旅投资以83.95亿元拿下广州北站两地块，建设粤港澳大湾区首个免税商业文旅综合体

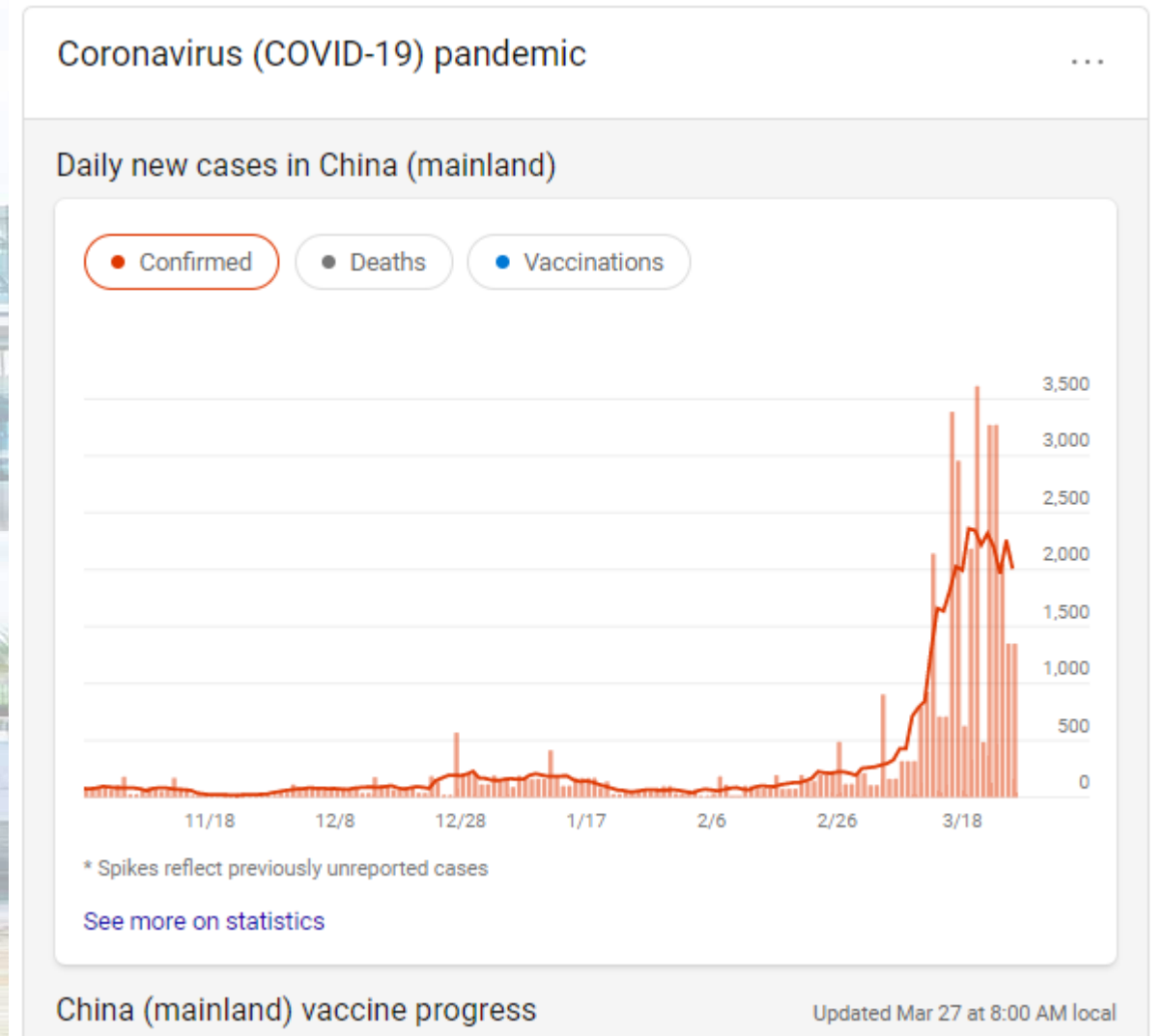


Guangzhou Board & Downtown Potential Duty Free Related Project

3. 2 major factors affecting the development of the industry



POLICIES





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Q / A

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- General Manager, Amberich International (Travel Retail Service)