



DUBAI DUTY FREE

TFWA WEBINAR

FASHION IN TRAVEL RETAIL

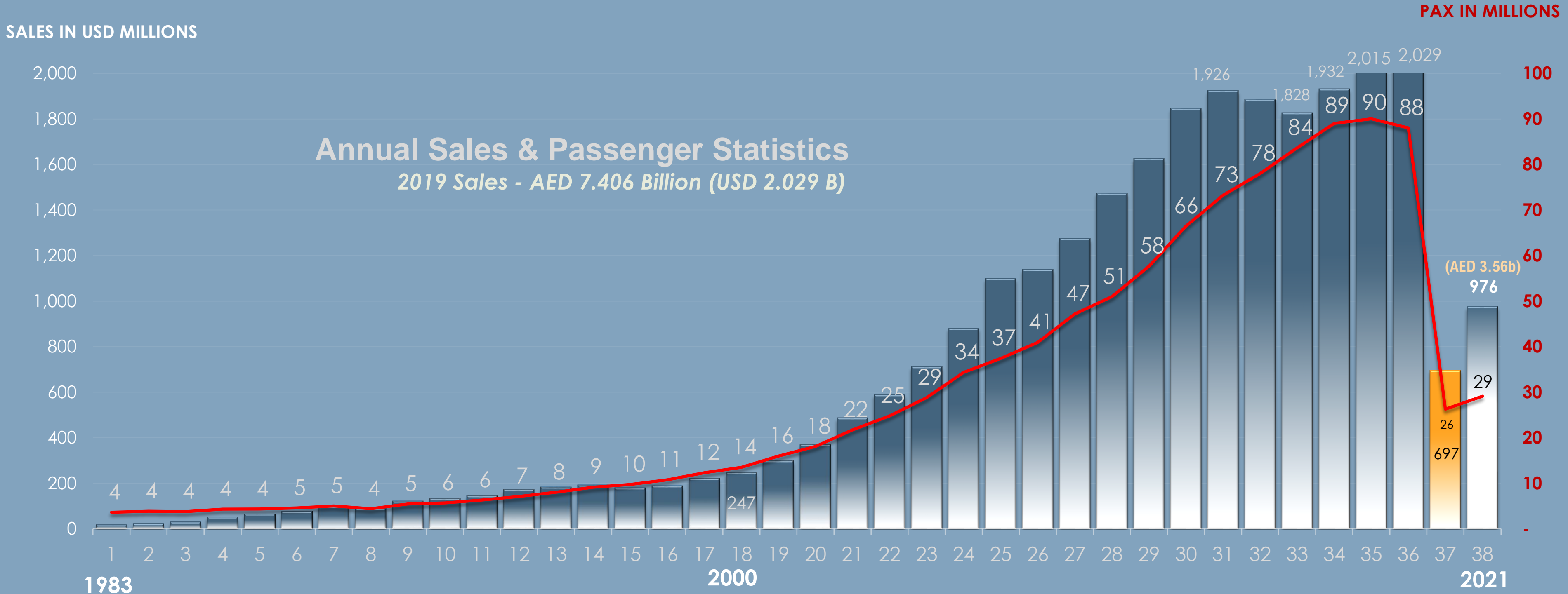
22nd January 2022

Sharon Beecham

Senior Vice President – Purchasing
Dubai Duty Free

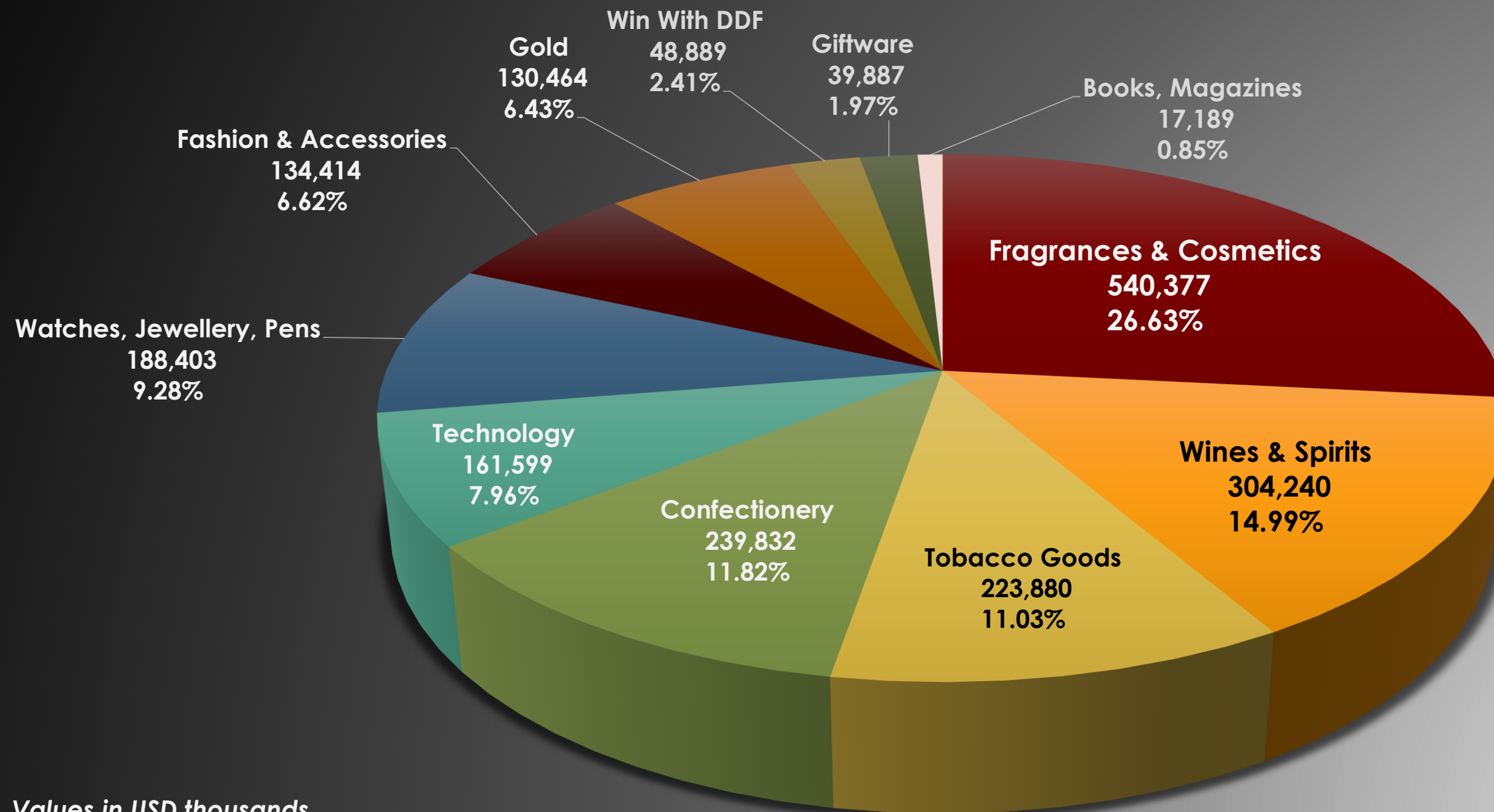


Sales vs Passengers (1983 – 2021)



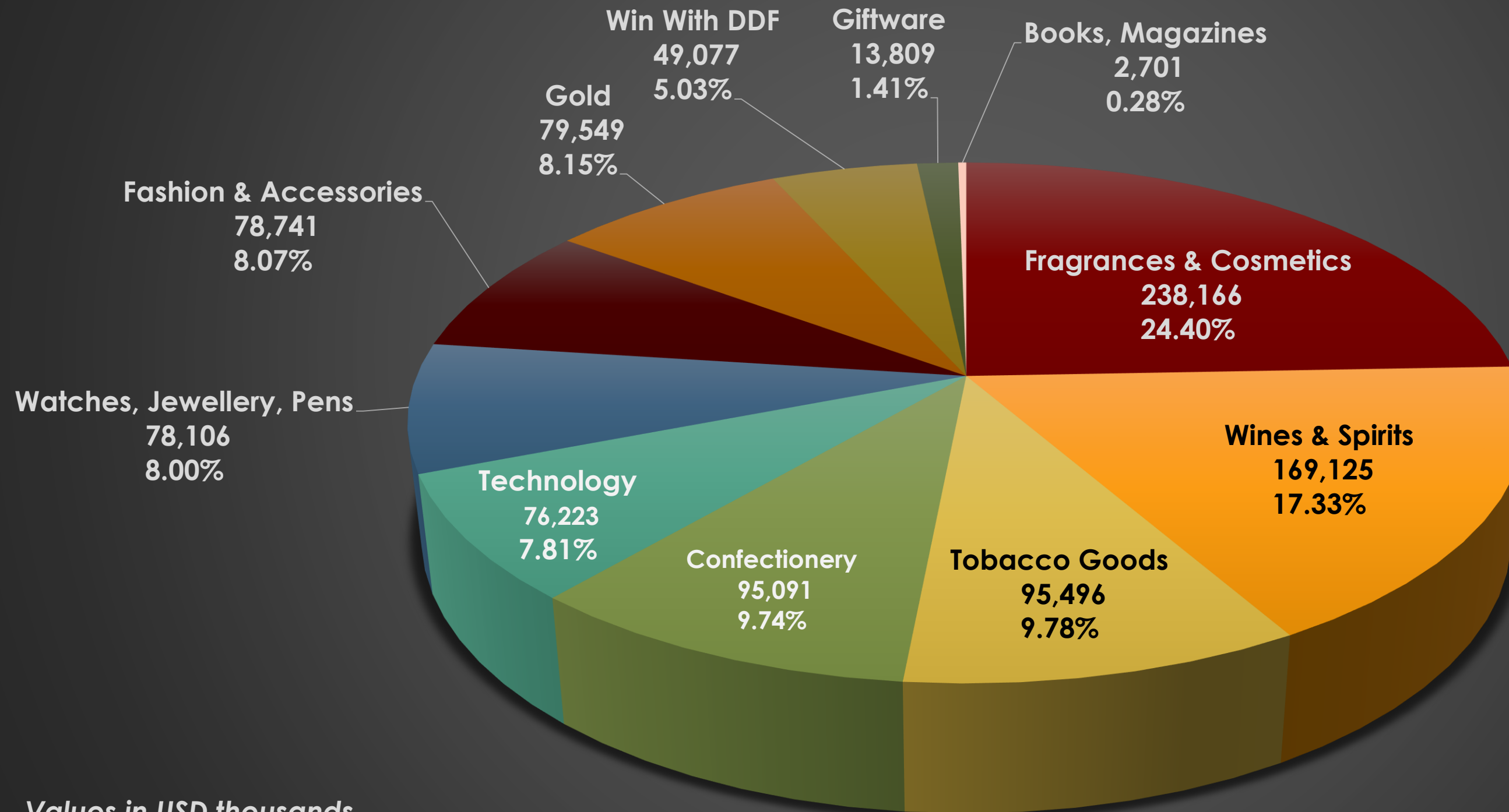
■ **10.3% average sales growth over 37 years.**

Sales Contribution by Product Group Total Company – 2019



Values in USD thousands

Sales Contribution by Product Group Total Company - 2021

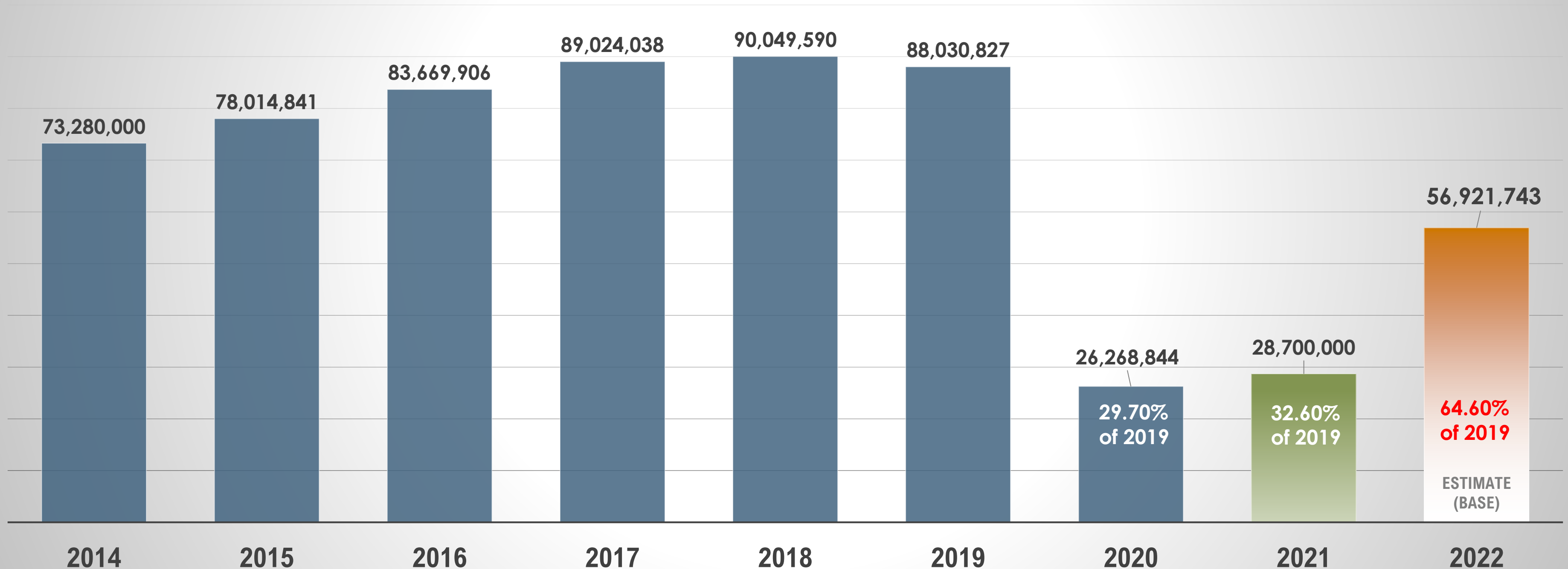


Values in USD thousands



AIRPORT PAX – Forecast

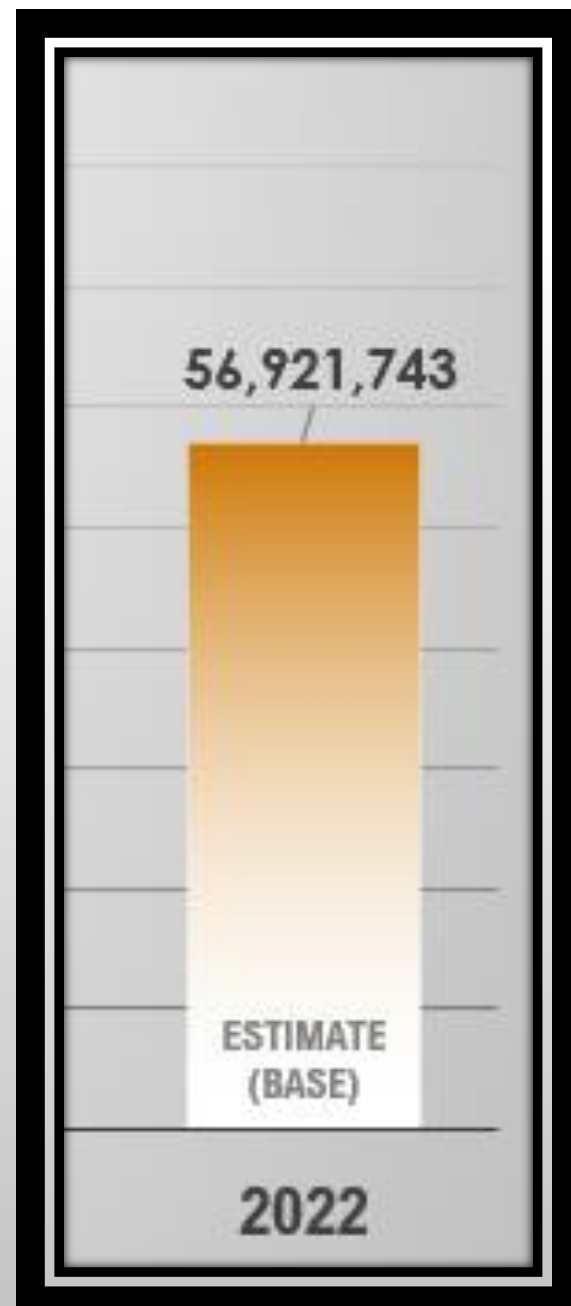
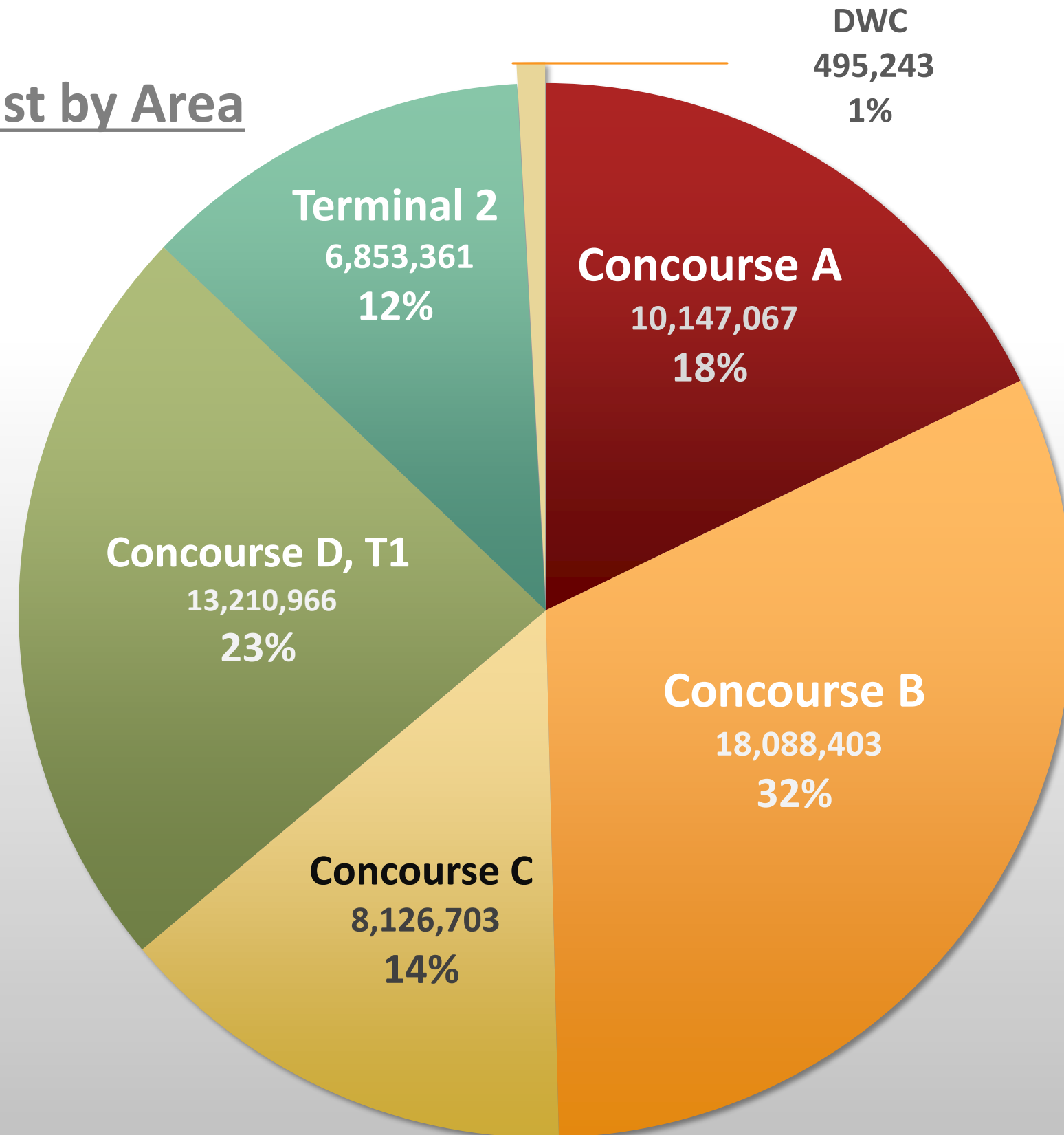
Total Passengers





AIRPORT PAX 2022 – Forecast

PAX Forecast by Area



	2019 PAX Share	2022 PAX Share	Var in Millions
CA, CB, CC, T3	67%	64%	-22.7m
CD, T1	19%	23%	-3.7m
Terminal 2	11%	12%	-3.7m
AMIA	1.8%	1%	-1.1m

FASHION BOUTIQUES

BOUTIQUES - Where they are				
	CA	CB	CD	Total
CHANEL	Jul-14	Jun-19	-	2
GUCCI	Jul '13 / Mar '20	Dec-18	-	2
DIOR	Dec-21	Sep-21	-	2
LOUIS VUITTON	-	Dec-21	-	1
HERMES	Jul-14	-	-	1
BVLGARI	-	Feb-18	-	1
BURBERRY	-	-	Feb-16	1
TIFFANY	-	-	Mar-16	1
CARTIER	-	14-Feb-22	-	1
Total	4	6	2	

CA FASHION BOUTIQUES:

- * 2019 Contribution to Total Concourse A sales - 10.50%
- * 2021 Contribution to Total Concourse A sales - 8.43%



CONCOURSE A FASHION BOUTIQUES



CONCOURSE A FASHION BOUTIQUES





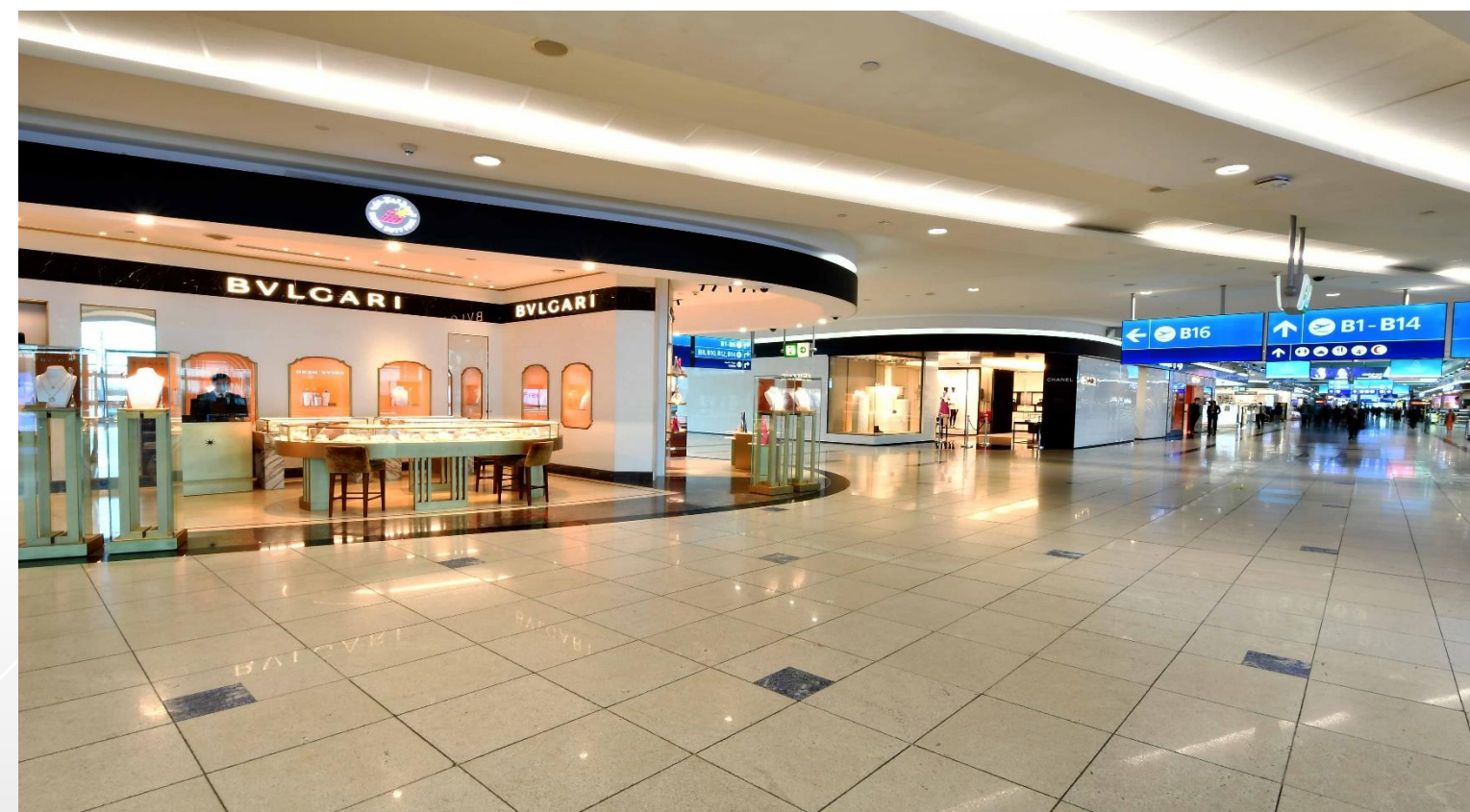
CONCOURSE A FASHION BOUTIQUES



CONCOURSE B FASHION BOUTIQUES

CB FASHION BOUTIQUES:

- * 2019 Contribution to Total Concourse B sales - 5.90%
- * 2021 Contribution to Total Concourse B sales - 10.69%



CONCOURSE B FASHION BOUTIQUES



CONCOURSE B FASHION BOUTIQUES



CONCOURSE B FASHION BOUTIQUES



CONCOURSE B FASHION BOUTIQUES



CONCOURSE B FASHION BOUTIQUES



CD FASHION BOUTIQUES:

- * 2019 Contribution to Total Concourse D sales - 0.99%
- * 2021 Contribution to Total Concourse D sales - 1.64%



CONCOURSE D FASHION BOUTIQUES



CONCOURSE D FASHION BOUTIQUES



CONTRIBUTION TO TOTAL DDF SALES				
	2019	2020	2021	2022 BUDGET
FASHION BOUTIQUE	4.28%	4.30%	5.88%	10.02%
PERFUMES AND COSMETICS	26.63%	23.87%	24.40%	23.45%
LIQUOR AND TOBACCO	26.03%	26.99%	27.11%	26.58%
CONFECTIONERY AND DELICATESSEN	10.22%	10.22%	8.56%	9.60%
GOLD	6.43%	6.79%	8.15%	6.86%

PAX PROFILE

TOP TEN (10) SPENDERS BY DESTINATION

2019		2020		2021	
COUNTRY	% CONT	COUNTRY	% CONT	COUNTRY	% CONT
CHINA	35.78%	CHINA	17.57%	RUSSIA	9.61%
UNITED KINGDOM	5.24%	UNITED KINGDOM	8.09%	UNITED KINGDOM	6.43%
SAUDI ARABIA	4.81%	RUSSIA	5.21%	MALDIVES	6.28%
INDIA	4.31%	SAUDI ARABIA	5.13%	SAUDI ARABIA	6.15%
KUWAIT	3.19%	MALDIVES	4.43%	U.S.A.	5.50%
U.S.A.	3.07%	INDIA	4.27%	INDIA	4.30%
RUSSIA	2.79%	U.S.A.	4.23%	BAHRAIN	3.51%
THAILAND	2.33%	KUWAIT	3.31%	EGYPT	3.35%
SOUTH AFRICA	1.63%	EGYPT	2.85%	TURKEY	3.17%
ITALY	1.59%	BAHRAIN	2.36%	PAKISTAN	2.73%
<i>OTHER COUNTRIES</i>	<i>35.28%</i>	<i>OTHER COUNTRIES</i>	<i>42.55%</i>	<i>OTHER COUNTRIES</i>	<i>48.98%</i>

BOARDING CARD ANALYSIS BY REGION

YEAR	AFRICA	AMERICAS	AUSTRALASIA	EUROPE	FAR EAST	SUB-CONTINENT	MIDDLE EAST	RUSSIA
2019	8.30%	4.36%	1.26%	17.30%	45.50%	7.43%	12.67%	3.18%
2020	9.48%	5.45%	1.13%	20.41%	27.53%	11.63%	16.44%	7.89%
2021	9.72%	6.64%	0.32%	26.81%	8.91%	14.27%	19.07%	14.23%