

DUF RY THOMASJULIE  TAX & DUTY FREE

BUY 2
& GET 1 **FREE** ON YOUR
FAVOURITE BRANDS



2+1 행사 인기 주류 식품 브랜드

2+1 행사 인기 주류 식품



DUF RY

STATE OF THE TRAVEL
MARKET IN ASIA PACIFIC
Pedro Castro

2+1 행사

50% 할인

COVID has
shown us man's
vulnerability in
the face of forces
of nature



COVID: 15 lessons we learned

1. Who to protect



2. The importance of having a good team of heroes



3. What we really need to be protected



4. What we really need to survive



5. The importance of good stock



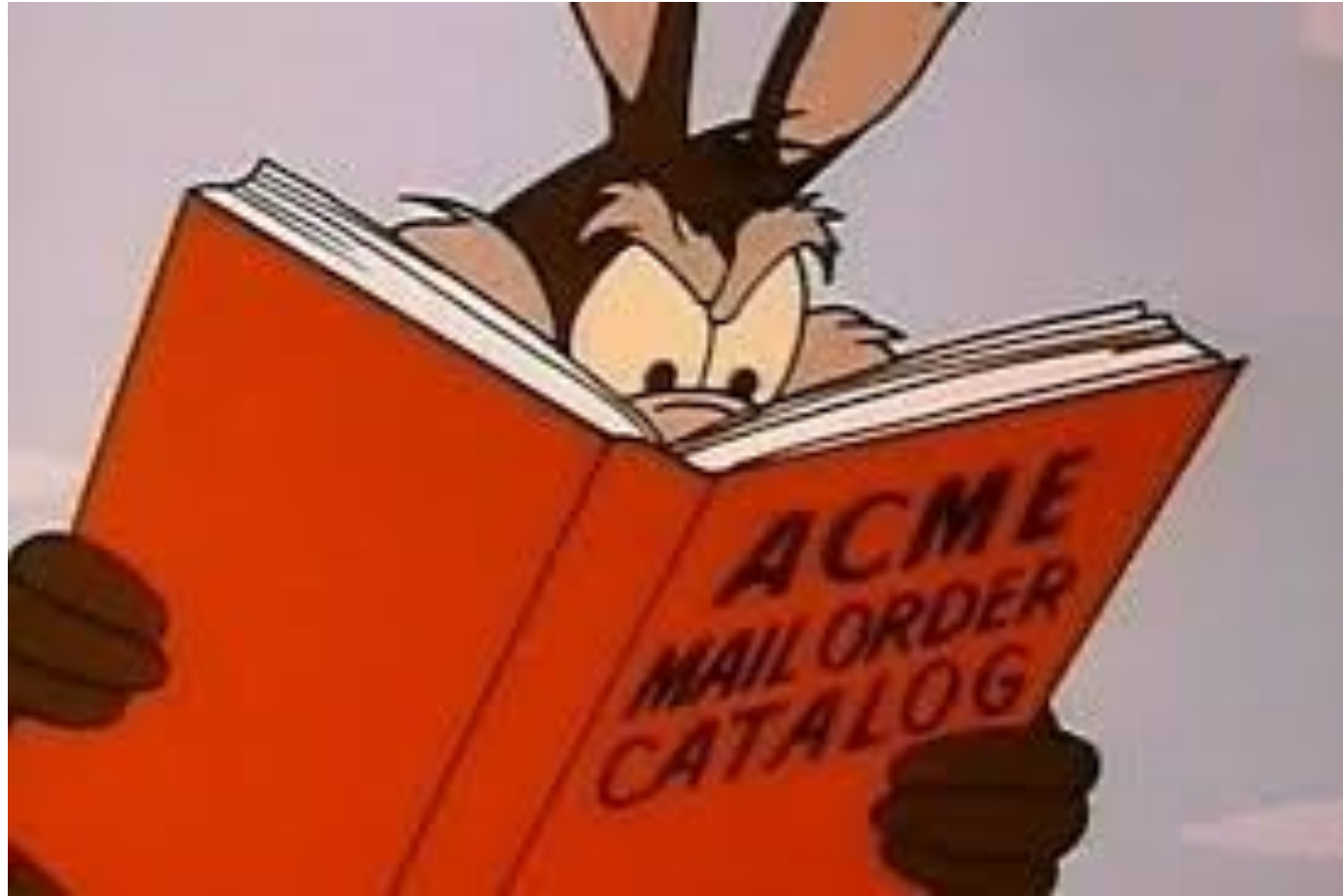
6. That panic-stocking should be avoided



7. That the business could be completely stopped for a long time



8. The importance of choosing the right solutions



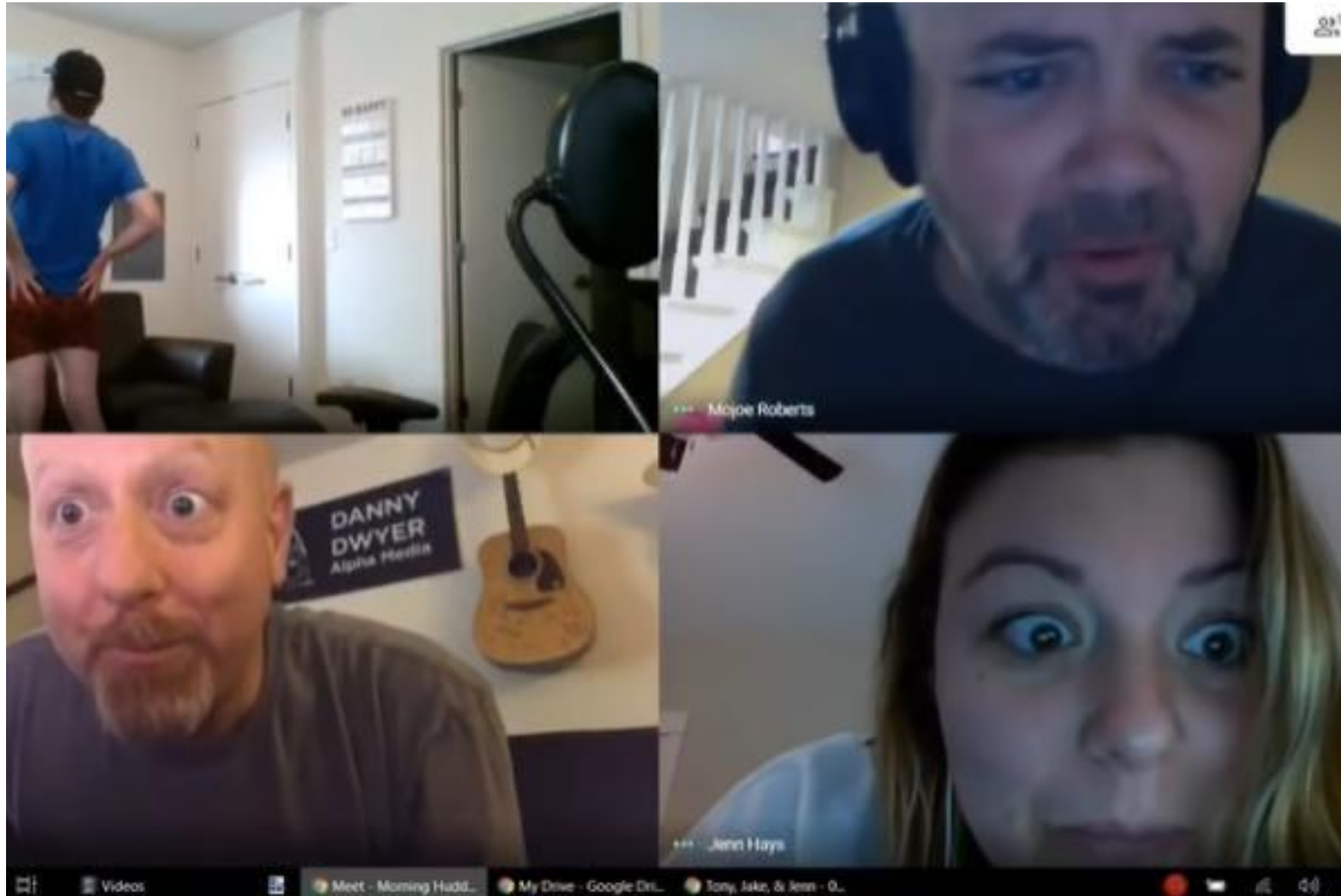
9. The importance of having the right tools



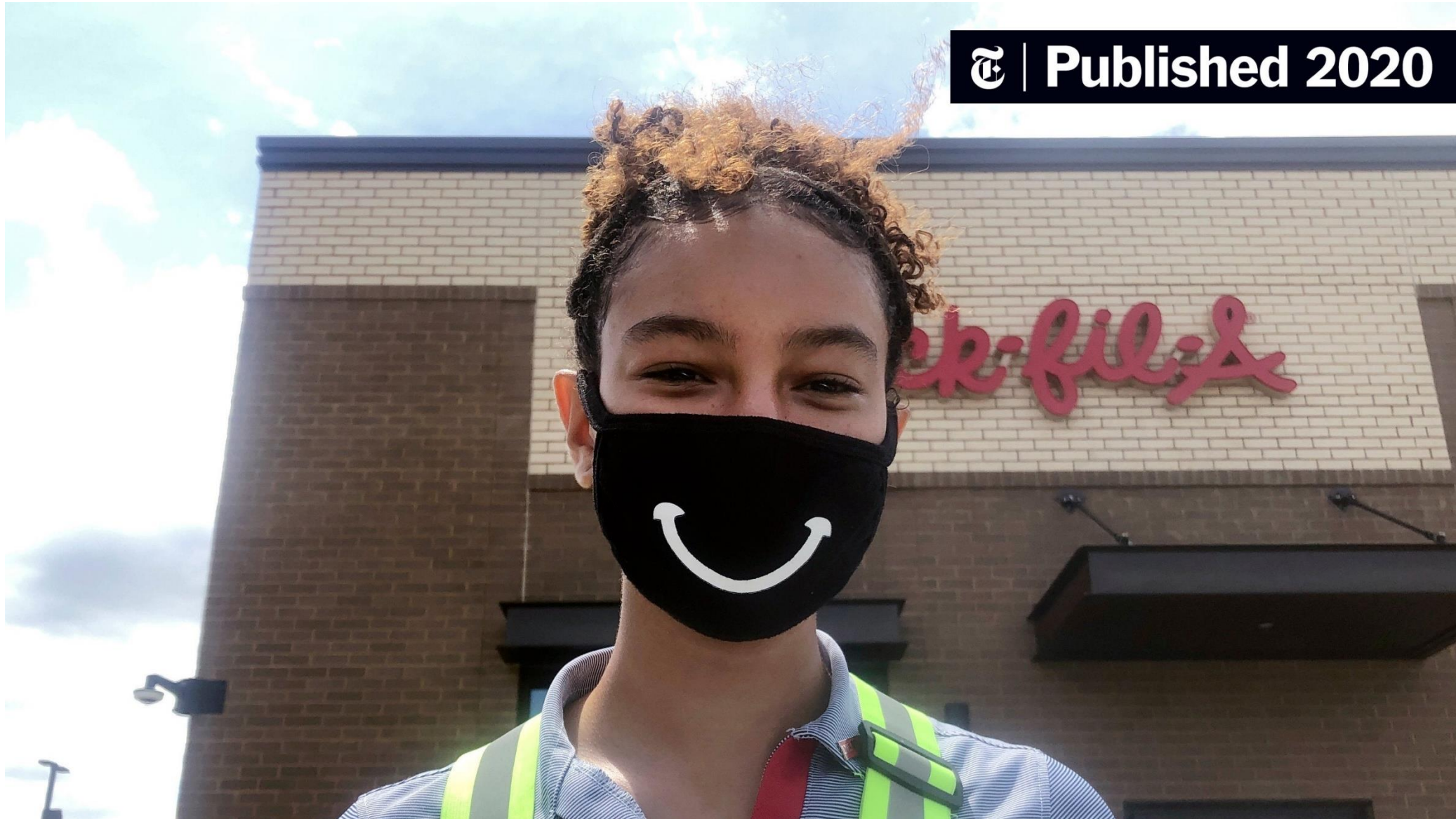
10. The importance of closing simple and win-win agreements



11. That video conferencing is great...but not the same



12. That the right attitude is always needed



13. That new products can be introduced



14. That people still want to travel, regardless of the obstacles



15. That a good, passionate and united team with the same goals, will succeed



The Dufry Asia Experience

7 countries
Australia, Cambodia, China (Mainland, Hong Kong and Macau), Indonesia, Singapore, South Korea, Malaysia

16 locations
including Cambodia, Hong Kong, Singapore Changi, Shanghai and Melbourne

more than **100**
stores at airport including Phnom Penh, Siem Reap, Sihanouk, Singapore Changi, covering more than 20,000 m²

more than **1,500** employees.



*excludes Middle East operations

Our latest developments in APAC

15/03/2022

Dufry extends duty-free concession for six years and increases retail space at Bali International Airport

Dufry, leading global travel retailer, has successfully extended its duty-free concession at Bali's I Gusti Ngurah Rai International Airport for another six years, which in 2019 welcomed 14 million travelers, and where Dufry has been operating since 2013. The new six-year contract also includes an increase in retail space of over 1,400 m², thus extending the total sales area to over 3,600 m², which will allow for the introduction of fashion and accessories as new categories.

[READ MORE](#) →

30/09/2021

Dufry extends its Cambodia duty-free concession with three airports for five and a half years.

Dufry, leading global travel retailer, has successfully extended for five and a half years its duty-free concession at Cambodia's three international airports in Phnom Penh, Siem Reap and Sihanoukville, which in 2019 welcomed 11.6 million international travelers. The extended concession contract starts in October 2021 and covers departure and arrival duty-free shops at the Phnom Penh and Siem Reap hubs as well as the departure shop at the Sihanoukville airport with a total sales area of 2,680 m², which Dufry has operated ever since 2003.

[READ MORE](#) →



What this means for the business

Two major extensions were delivered in 2021 in Bali, Indonesia, and at all three main international airports in Cambodia

BALI 🇮🇩 DUTY FREE

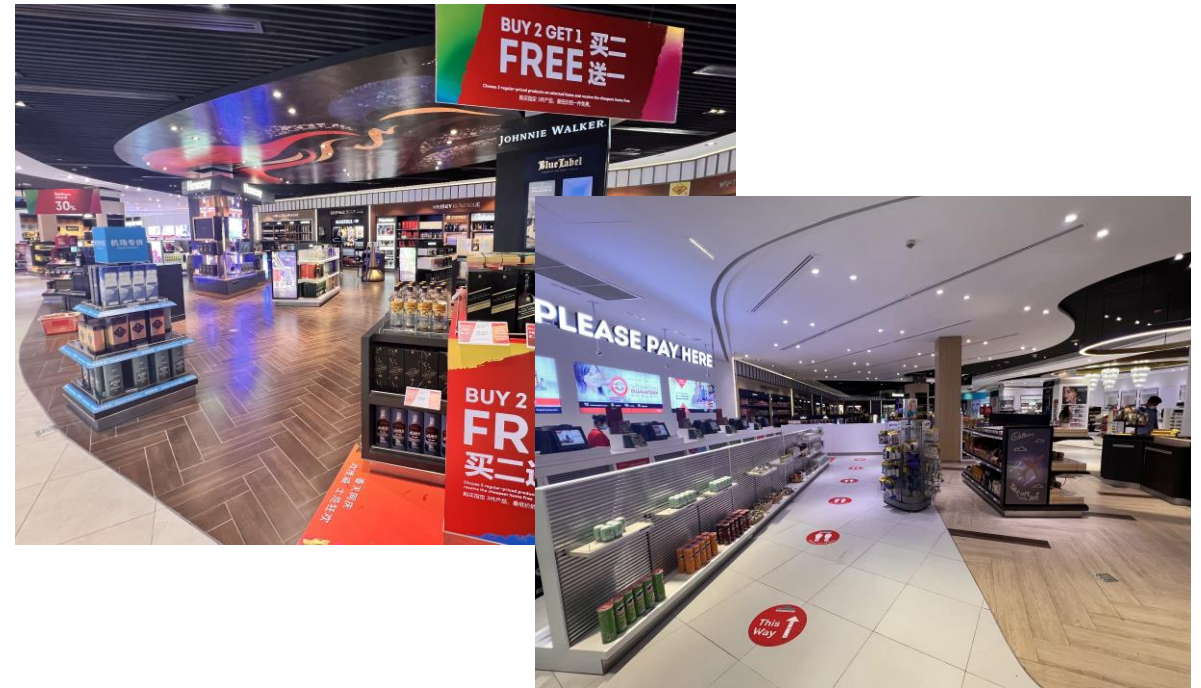


>3,600 m²



+6 years

PHNOM PENH 🇰🇲 DUTY FREE SIEM REAP 🇰🇲 DUTY FREE SIHANOUK VILLE 🇰🇲 DUTY FREE



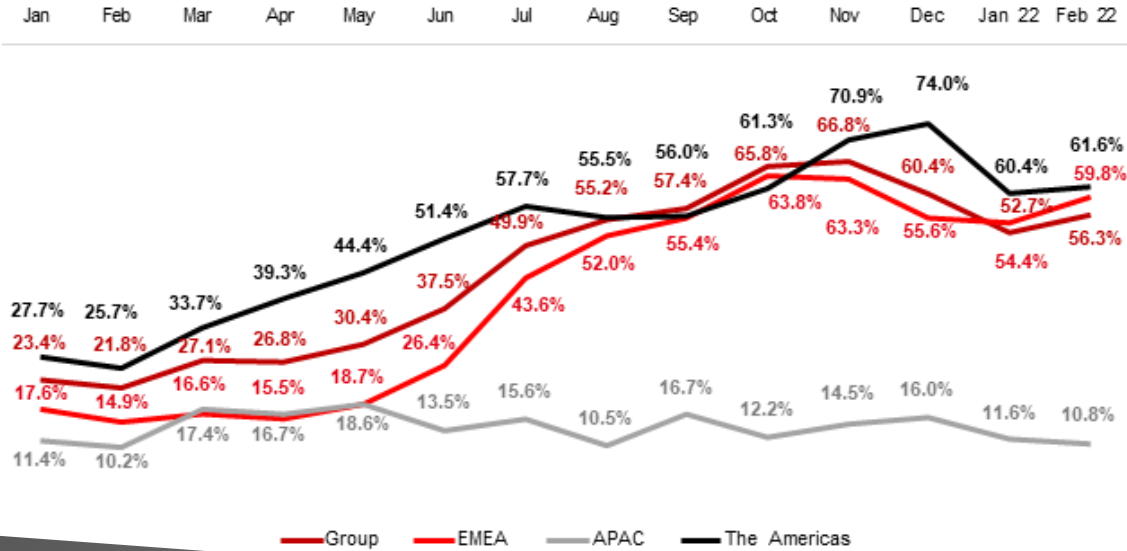
>2,650 m²



+5.5 years

Dufry APAC is ready to support rapid return once passengers return

Sales Across Dufry's Regions as % of 2019



Forecasts for Return to 2019 Levels*

Data Provider	2019 Level In	2022 vs. 2019	2023 vs. 2019	2024 vs. 2019	Date of publication
ACI	Early 2024	-29%	-8%	>5%	24/02/22
IATA	2024	-17%	-6%	3%	01/03/22
ICAO	<i>not provided</i>	-27% to -31%	-	-	01/03/22
Air4cast	2023	-22%	-1%	-	07/03/22

- ✓ Positive sales trend for all EMEA and Americas regions during 2021
- ✓ Progress especially driven by US, Central America and Caribbean, as well as Europe since the second half of 2021

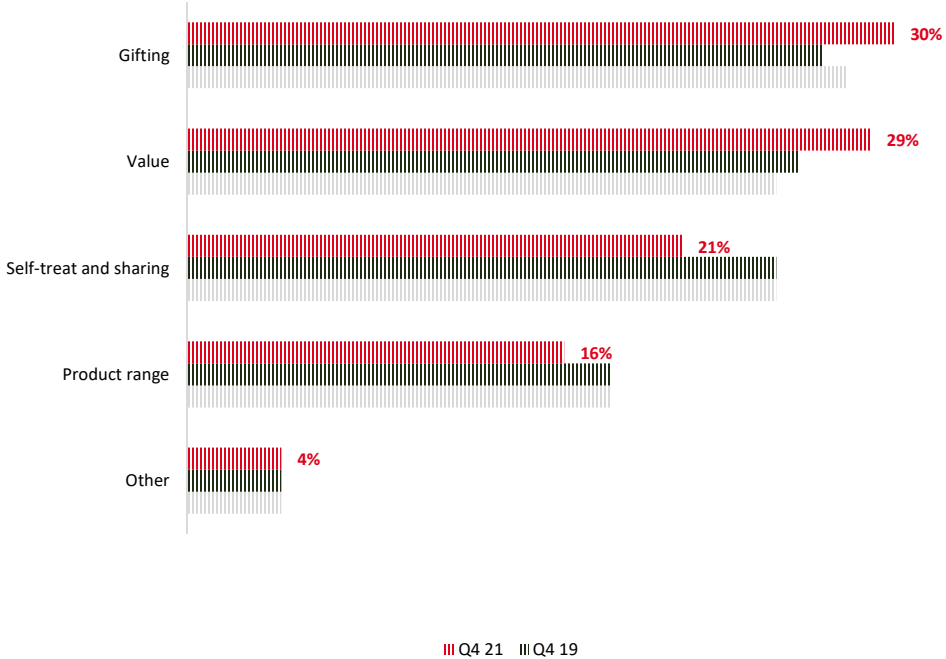
- ✓ Emergence of Omicron variant impacted sales, however, high elasticity of demand as soon as travel is resuming
- ✓ Return to normalcy expected between 2023-24

*Updates not fully synchronized with real-time changes in external environment, e.g. geo-political tensions, inflation concerns, ad-hoc government reactions to Covid-related developments

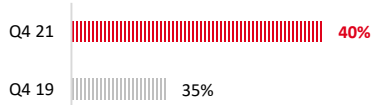
Encouraging customer insights for Travel Retail – the evolution of the passenger profile

Dufry with flexible assortment, pricing and product policies to cater to travellers' needs

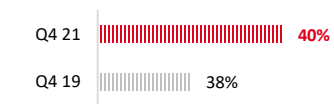
DRIVERS FOR PURCHASING AT DUTY-FREE STORE



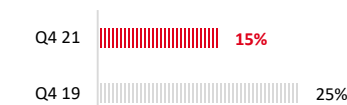
PAX PROFILE ALREADY STARTS TO NORMALIZE



Younger
profile in airports



Local Pax
only slightly above 2019 levels




Business Pax
showing increase already

Results based on Dufry Customer Perception Tracking: 9,461 Face to face store exit interviews in top locations, representing around 40% of FY 2021 turnover. Fieldwork: Oct-Dec 2021. Interviews in Q4 2019 and Q4 2018 with similar setup, Margin error (at 95% of confidence): ±1,01%
This is an unprompted question, gathering from the customers just their TOP of mind (most important) driver to purchase

In the meantime we've been busy with new projects...



An aerial photograph of a large, modern shopping mall complex, Mova Mall, featuring a complex, multi-level design with curved walkways and green spaces. A semi-transparent architectural site plan is overlaid on the image, showing the layout of buildings, roads, and landscaping. The text is centered over the plan.

Dufry capitalizes on its expertise and through the unwavering support of AliBaba, GDF and our brand partners, has been able to introduce a world class retail execution within a limited period at Mova Mall, breaking new grounds in project implementation

Mova Mall key achievements and learnings – physical store

- Completed the planning, layouts, and construction of phase 1 within 4 months
- Now GDF is operating 39,000 m² retail area
- 200 brands
- Marketing campaigns
- Advised on organization structure & operational processes



Mova Mall key achievements and learnings – physical store



GIF PLAZA

海控全球精品免税城

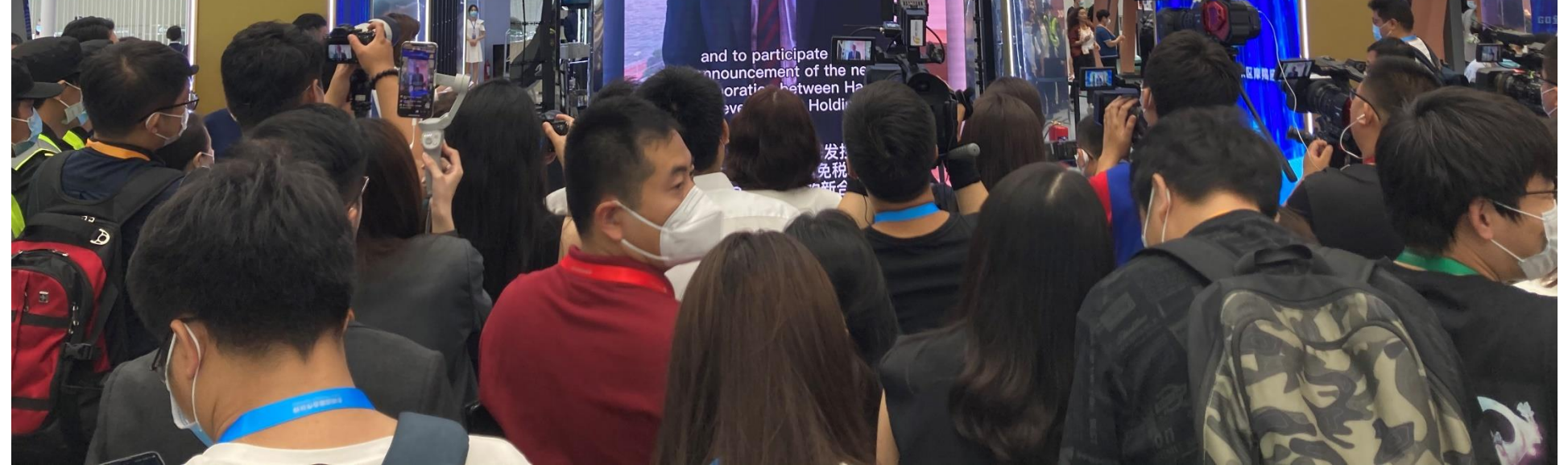
GIF PLAZA
GO全球 全球购

佩德罗·卡斯特罗, 杜福睿亚太区首席运营官
By Pedro Castro, Chief Operating Officer, APAC of Dufry



and to participate
announcement of the ne
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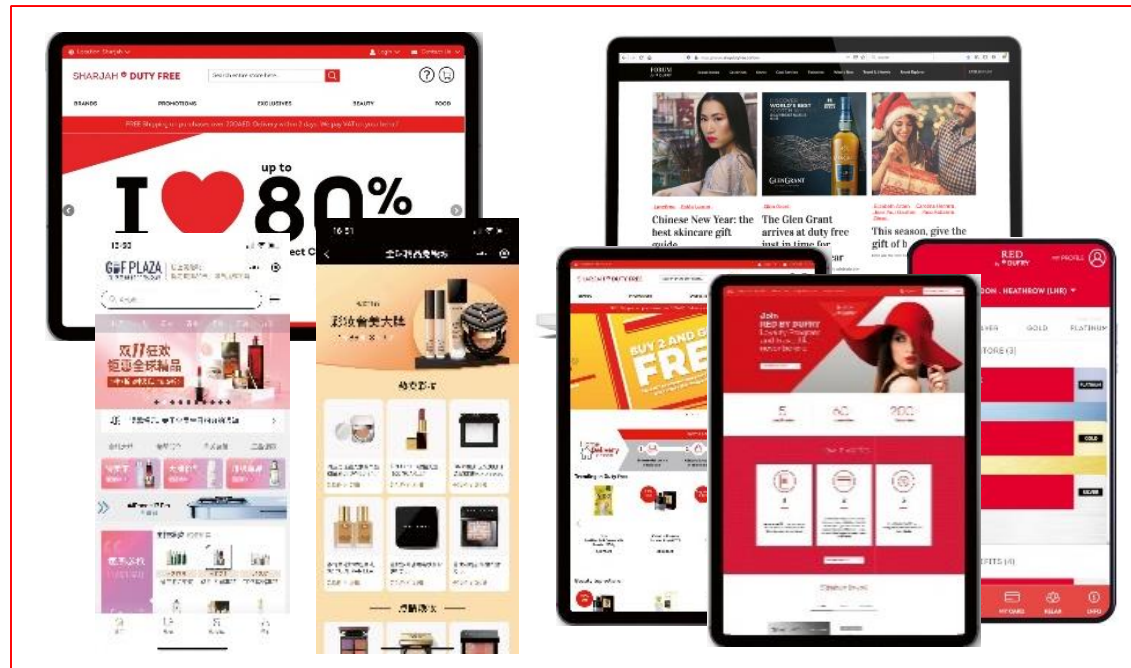
GIF PLAZA
GO全球 全球购



SEPHO

Mova Mall key achievements and learnings – online store

- Developed mini-programs on Wechat, Alipay & Fliggy
- Designed brand boutiques for key beauty brands online
- Started live-sales streaming activities on Douyin
- Achieved significant sales through online channel within a very short period



Building on joint strength – Dufry’s key strategic partner

Alibaba has a participation of 7.7 % in Dufry and has a strategic working group to enhance Dufry’s digital capabilities, opening up possibilities beyond the physical store



www.shopdutyfree.com



RED
By DUFRY

Reserve
& Collect
by DUFRY

FORUM
by DUFRY

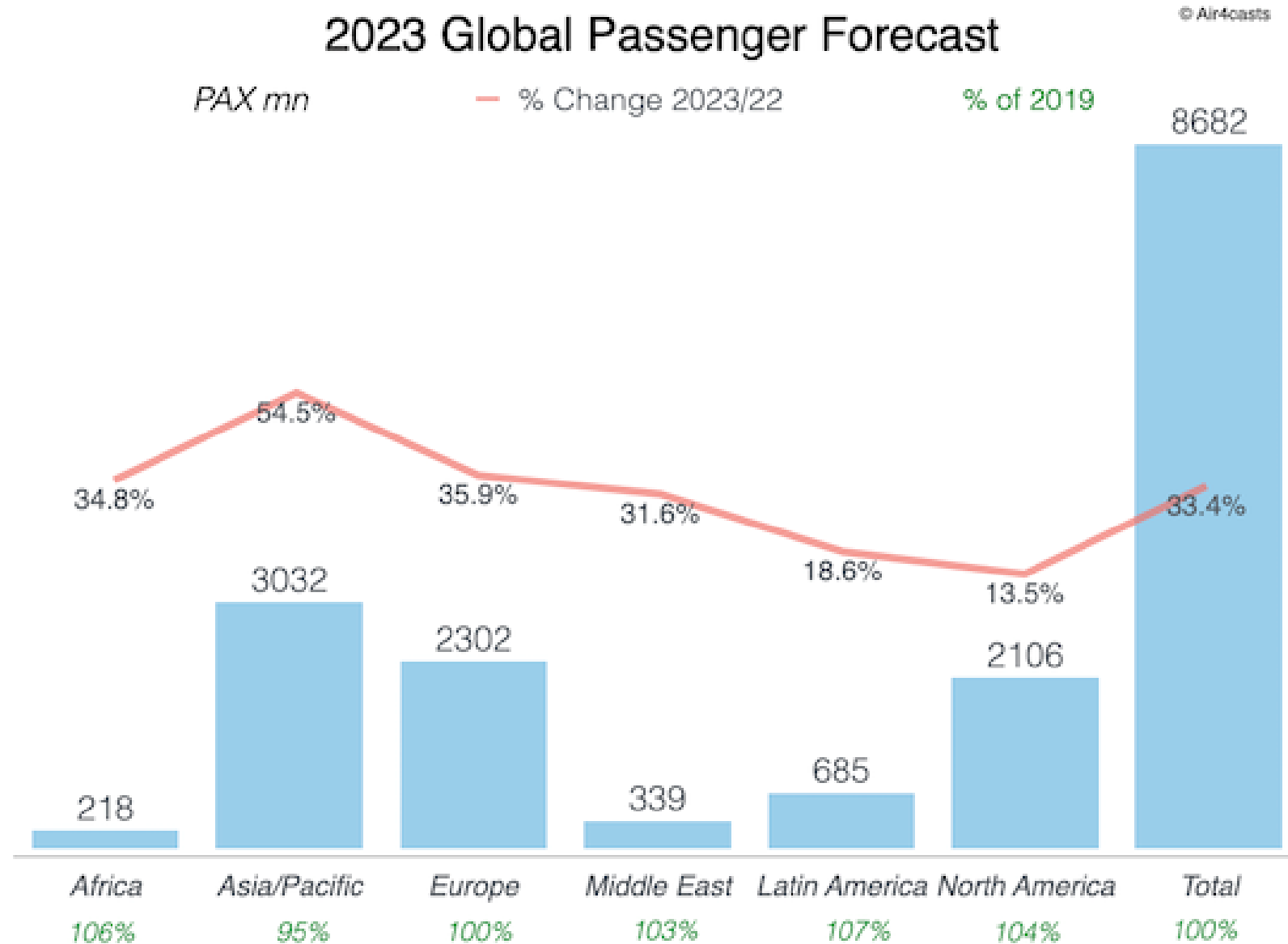


RED Loyalty Programme / Reserve & Collect / Staff
Digitalisation / Social Media / Immersive Digital Communication

China e-Commerce: Taobao, Tmall
Cross Border & Global: Lazada, Koala, AliExpress
Consumer Services: Alipay, Koubei
Digital Media, Innovation and Entertainment:
Yoku, Damai, Amap, Tmall Genie

Dufry strongly believes in
the great potential of Asia
Pacific Travel Retail

The region is showing excellent growth prospects and expected to normalise next year



WHITE WALKER
BY JOHNNIE WALKER

GAME OF THRONES

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MELBOURNE DUTY FREE



The importance of Diversity





ORGULLLO

SENTIMIENTO