TFWA

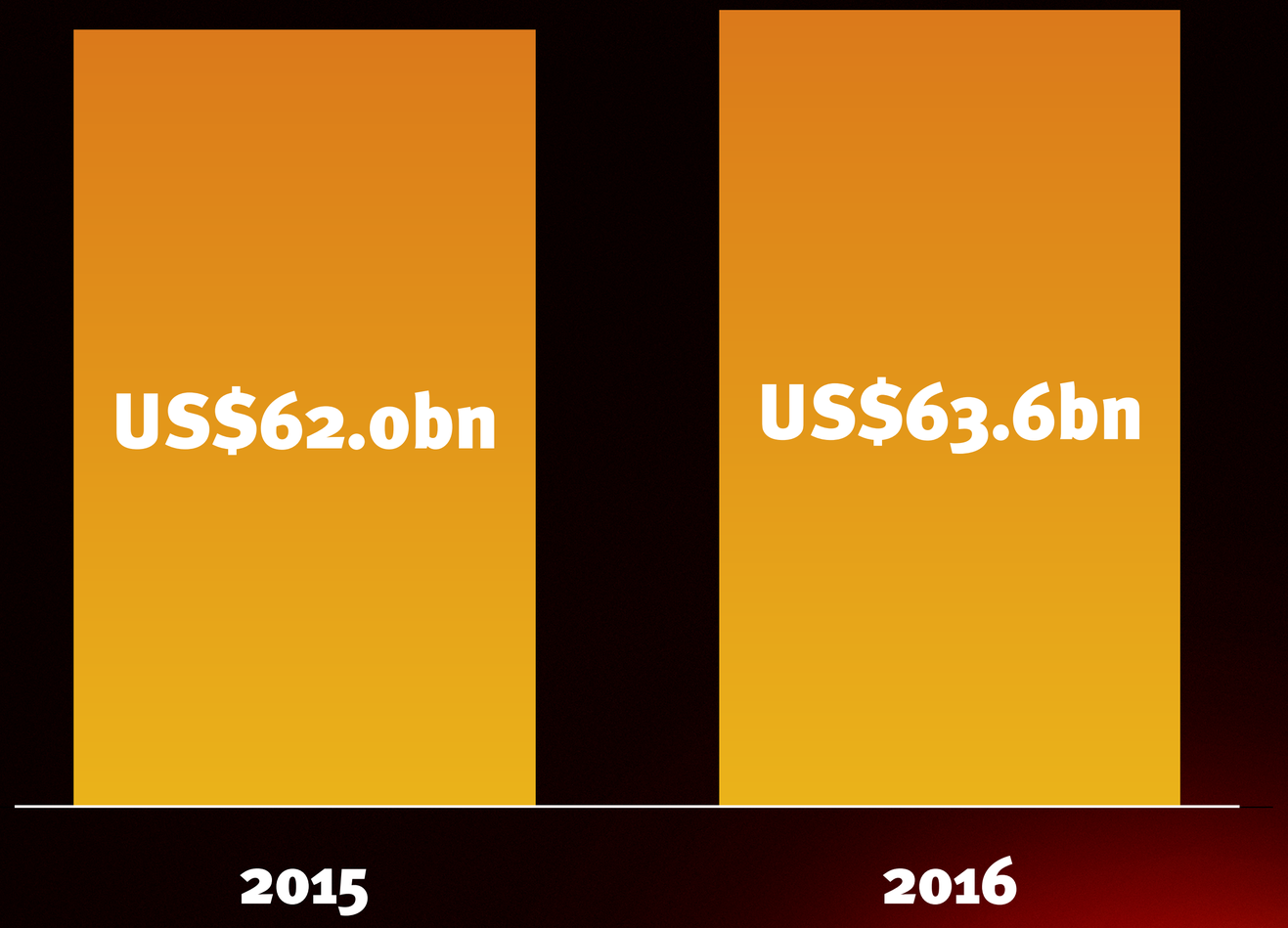
ASIA PACIFIC
EXHIBITION &
CONFERENCE

RE-IGNITING OUR INDUSTRY

ERIK JUUL-MORTENSEN
PRESIDENT, TAX FREE WORLD ASSOCIATION

RE-IGNITING OUR INDUSTRY

PRELIMINARY GLOBAL DUTY FREE & TRAVEL RETAIL SALES DATA 2016



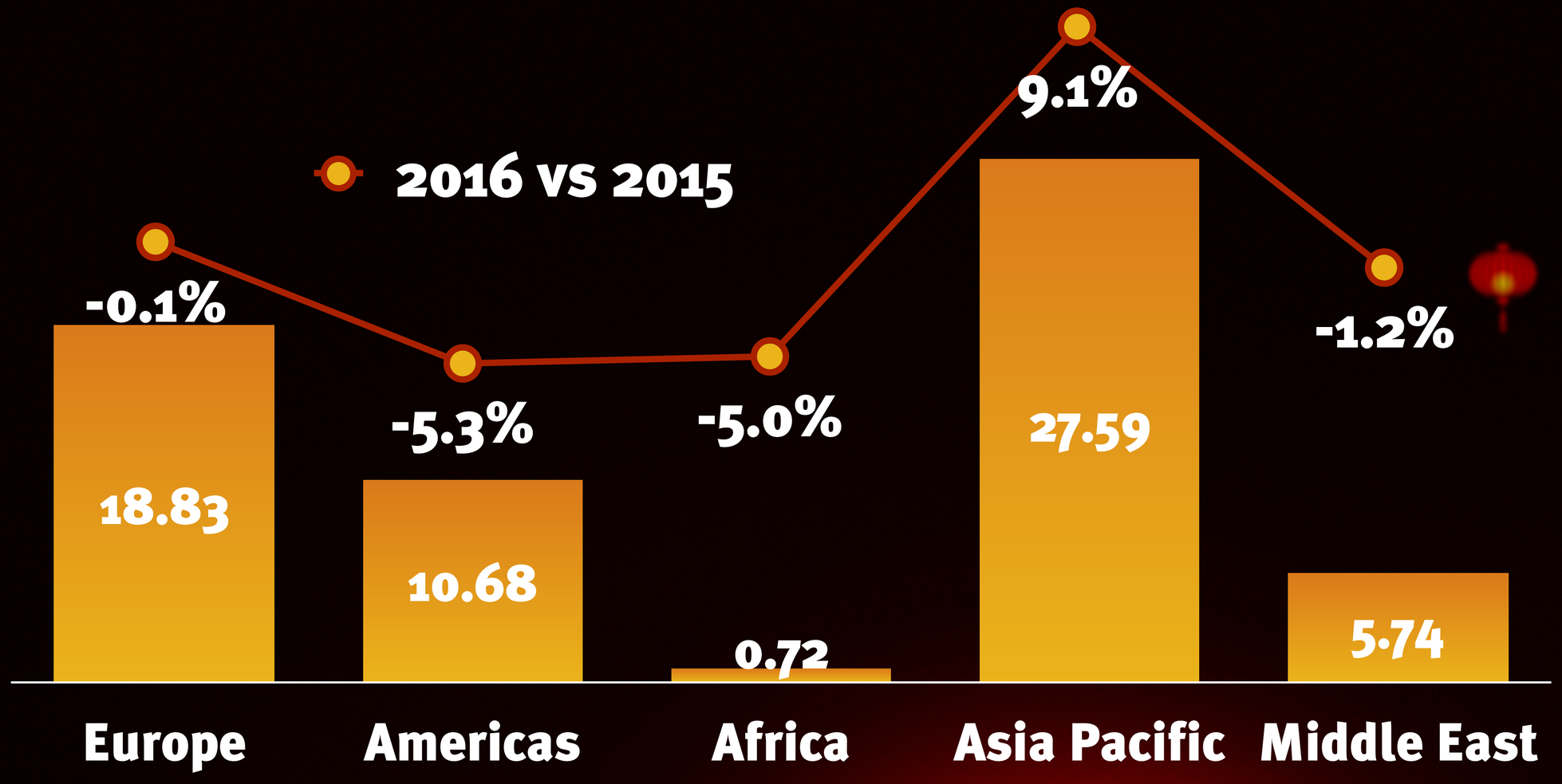
+2.5%

(2016 vs 2015)

US$ at current rates

SOURCE: GENERATION RESEARCH

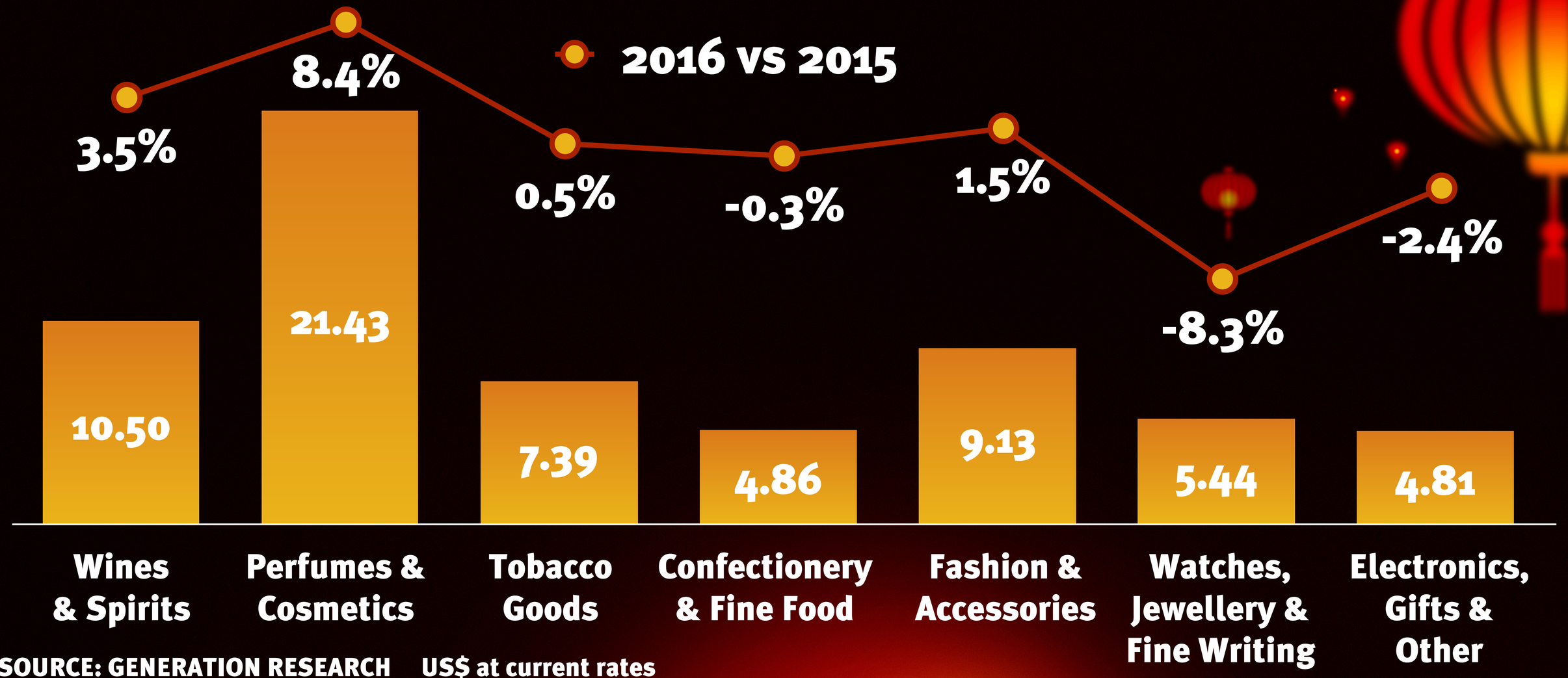
PRELIMINARY DUTY FREE & TRAVEL RETAIL SALES DATA 2016 - BY REGION (US$ BN)



US$ at current rates

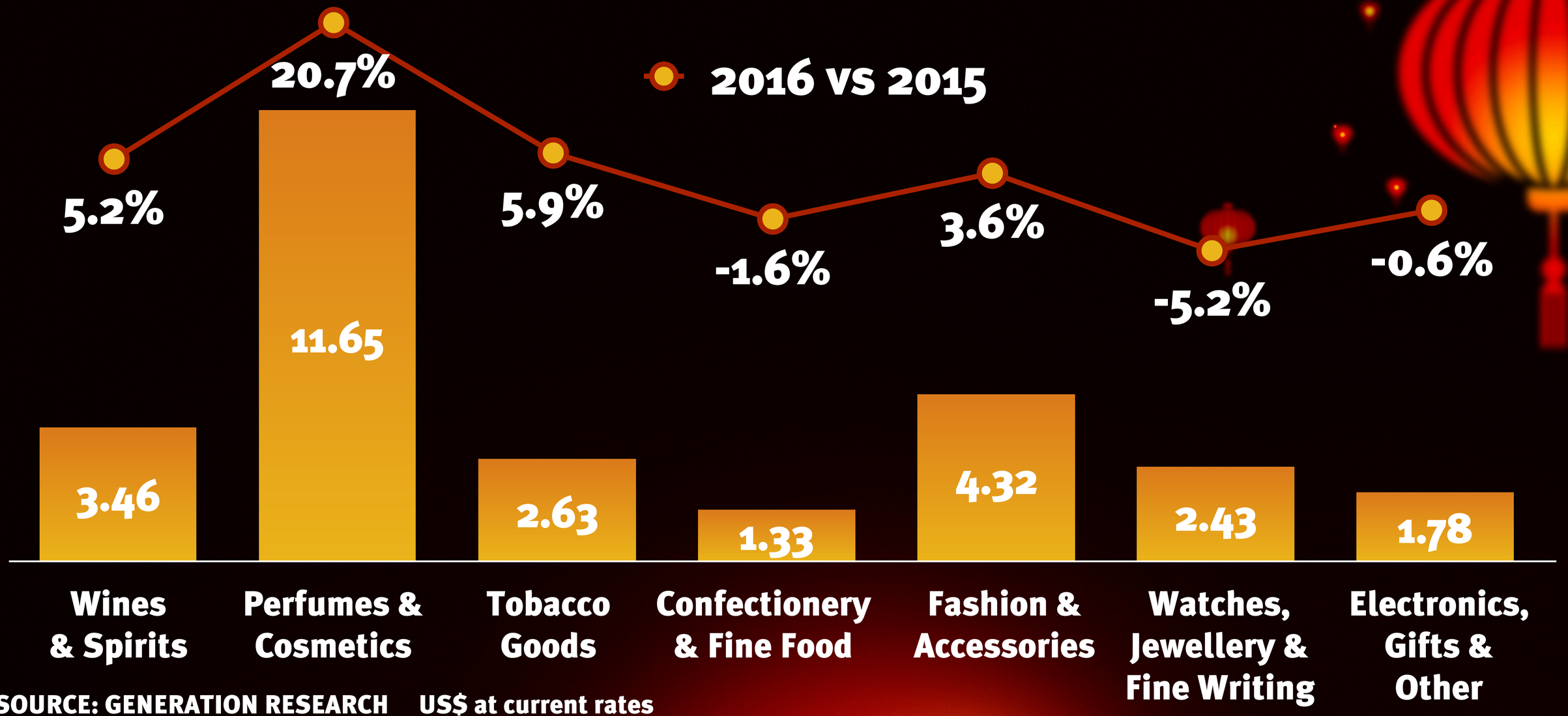
SOURCE: GENERATION RESEARCH

PRELIMINARY DUTY FREE & TRAVEL RETAIL SALES 2016 - GLOBAL BY CATEGORY (US$ BN)



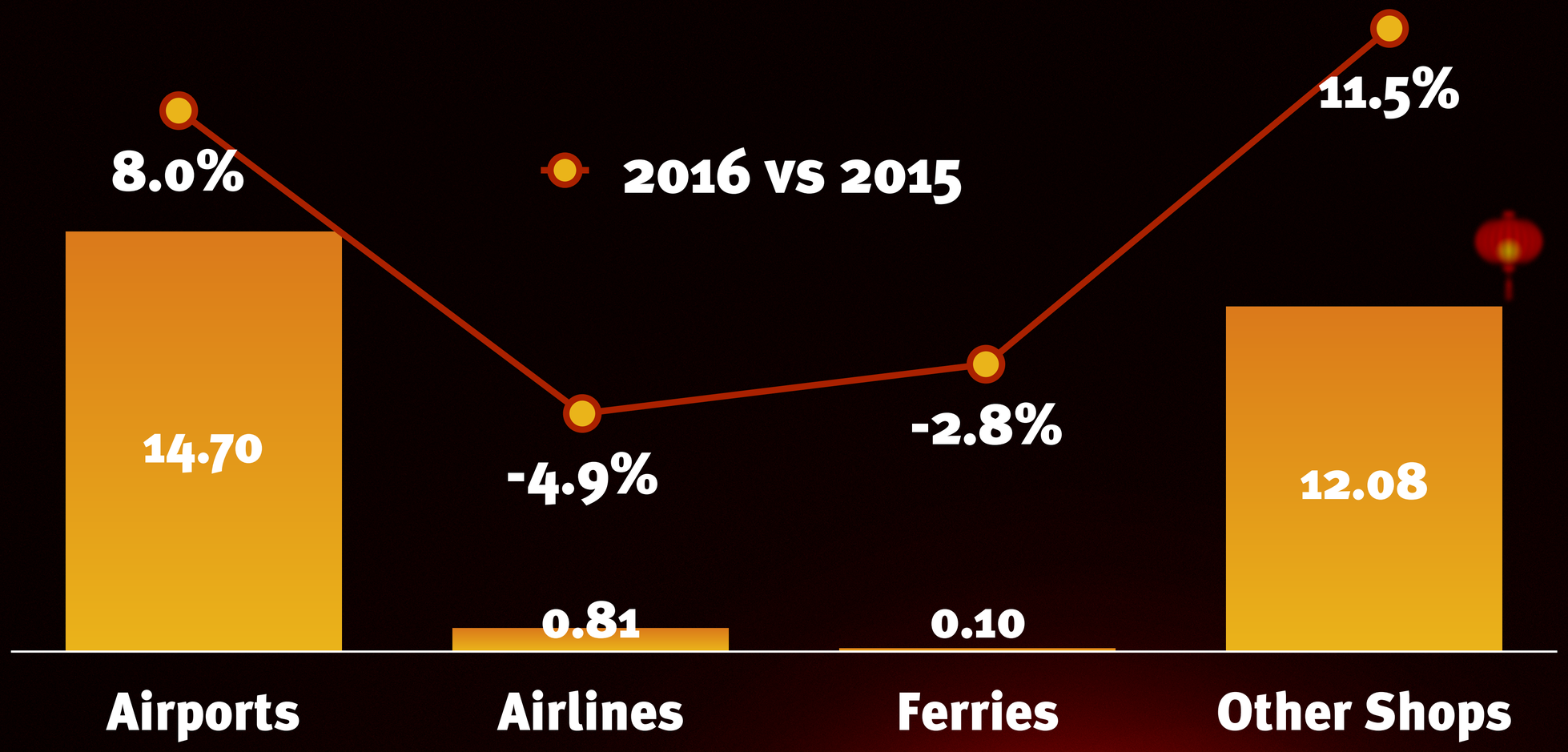
SOURCE: GENERATION RESEARCH US$ at current rates

PRELIMINARY DUTY FREE & TRAVEL RETAIL SALES 2016 - ASIA PACIFIC BY CATEGORY (US$ BN)



SOURCE: GENERATION RESEARCH US$ at current rates

PRELIMINARY DUTY FREE & TRAVEL RETAIL SALES 2016 - ASIA PACIFIC BY CHANNEL (US$ BN)



US$ at current rates

SOURCE: GENERATION RESEARCH

TOTAL AIR PASSENGER TRAFFIC FORECASTS TO 2020

	2017	2018	2019	2020
Global	8.1bn	8.6bn	9.0bn	9.5bn
Asia Pacific	2.9bn	3.1bn	3.3bn	3.5bn
Asia Pacific market share	35.8%	36.0%	36.7%	37.8%

SOURCE: ACI

REAL GDP GROWTH YEAR-ON-YEAR (%)

	2016	2017	2018
Global	3.1	3.5	3.6
Asia	5.3	5.5	5.4
Advanced Asia	1.6	1.9	1.6
Emerging Asia	6.4	6.4	6.4
China	6.7	6.6	6.2
India	6.8	6.6	6.2
Asean – 5	4.9	5.0	5.2

SOURCE: IMF WORLD ECONOMIC OUTLOOK UPDATE APRIL 2017

GROWTH

DIVERSIFICATION

AFFLUENCE

PROF. KISHORE MAHBUBANI

PRESIDENT OF THE UNITED

4K
BREAKING NEWS
THAAD MISSILE DEFENSE SYSTEM ARRIVES IN S. KOREA
00 : 00
THAAD missile defense system arrives in South Korea | SONG TUYEN TV NEWS

LOTTE
DUTY
FREE
THE SHILLA
duty free

Lagardère
TRAVEL RETAIL
cdf
中国免税品(集团)有限责任公司
CHINA DUTY FREE GROUP
HONG KONG

CHINA ARRIVALS DUTY FREE

1. Ürümqi
2. Shenyang
3. Dalian
4. Tianjin
5. Qingdao
6. Xian
7. Nanjing
8. Hangzhou
9. Chengdu
10. Chongqing
11. Kunming
12. Guangzhou
13. Shenzhen

REDISCOVERING JAPAN WORKSHOP

RE-IGNITING OUR INDUSTRY

TFWA
CHINA'S CENTURY CONFERENCE
MILLION
CHINESE PASSPORTS ISSUED IN 2015
护 照
PASSPORT
TFWA
一千六百万
2015年新签发的中国公民护
护 照
PASSPORT

CHINA'S
CENTURY
CONFERENCE

AGILITY

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PHYSICAL & DIGITAL INNOVATION

cdf
TFWA
CHINA'S
CENTURY
CONFERENCE
HANGE
ENTIAL
TFWA

BIG
DATA
INFORMATION
MANAGEMENT
TECHNOLOGIES
GOVERNMENT
PETABYTES
ANALYSIS
RESEARCH
SEARCH
INTERNET
STORAGE
SETS
LARGE
SOFTWARE
SAN
NAS
VOLUME
PROCESS
MILLION
SCIENCE
DEVELOPMENT
TECHNOLOGY
NEW
BILLION
FUTURE
PROCESSING
DATABASES
SIZE
EXABYTES
LEARNING
WORLD
BASED
EVERY
AMOUNT
APPLICATIONS
INFRASTRUCTURE
PRIVACY
INTERNATIONAL
IMPLEMENTATION
BECOMES
INITIATIVE
ECONOMIC
TERABYTES
MARKET
VARIETY
PROJECT
DISTRIBUTED
RELEVANT
ANNUAL
USED
NOW
RELATED
TIME
SENSOR
WOULD
PARALLEL
STATE
CRITIQUE
PEOPLE
TRAFFIC
CURRENTLY
USE
CRITIQUES
MAPREDUCE
NEARLY
MOST
END
HYPOTHESIS
INCLUDE
NETWORKS
PAST
ANNOUNCED
COMPLEX
LIMITS
CHALLENGES
HANDLE
SOURCES
REPLICATION
DRIVE
SOCIAL
YEARS
RESULTS
SYSTEMS
FACTOR
MANAGE
ONLINE
DAY
WORLDWIDE
MAKING
INTEGRATION
HAND
CAPACITY
ONE
OUT
MANY
APPROACH
SECOND
NATIONAL
FLOW
INTELLIGENCE
APPROACHES
PROCESSES
PARADIGM
RECORDS
COST
FUNDING
INSIGHT
TOOLS
CENTER
ARCHITECTURE
SHARED
COMPARED
USES
NEEDED
SUCCESSFUL
CAPABILITIES
YEAR
TERMS
PRIVATE
LESS
HUGE
VARIOUS
TIMES
HIGHER
ALGORITHMS
COMPANIES
DETERMINE
WELL
SET
DEPARTMENT
QUERIES
HIGH
USERS
REAL
STRUCTURE
WORK
RATE
MASSIVE
DEFINITION
USING
FRAMEWORK
BETWEEN
STATISTICS
BUSINESS
EFFECTIVE
VISUALIZATION
ANALYTICS
SIMULATIONS
PER

THE
MEADFA
CONFERENCE
28-29 NOV. 2016
LE MÉRIDIEN DUBAI HOTEL
KT
International
PM
PHILIP MORRIS INTERNATIONAL

DR BRENDAN O'REGAN

75 YEARS OF DUTY FREE

1947 — 2017

French Perfumes
TAX FREE
DUTY FREE
French Perfumes

70 YEARS OF DUTY FREE

1947 — 2017

70 YEARS OF DUTY FREE

OFFERING GREAT BRANDS AT GREAT PRICES

For seventy years, the duty free industry has brought the world's best brands to travellers, at great prices compared with domestic markets. And when you make the most of the bargains on offer at the duty free shop, you're helping your airport invest in the next seventy years.
Duty free & travel retail: part of the journey.

70 YEARS OF DUTY FREE 1947 — 2017

TFWA TAX FREE WORLD ASSOCIATION

70 YEARS OF DUTY FREE

MAKING TRAVEL MORE ACCESSIBLE

Thanks to the revenues generated in retail stores, airports all over the world have been able to reduce the landing fees they charge to airlines. That, in turn, helps airlines to keep ticket prices down. And that helps you and millions of travellers discover a whole new world.
Duty free & travel retail: part of the journey.

70 YEARS OF DUTY FREE 1947 — 2017

TFWA TAX FREE WORLD ASSOCIATION

70 YEARS OF DUTY FREE

SPREADING SMILES

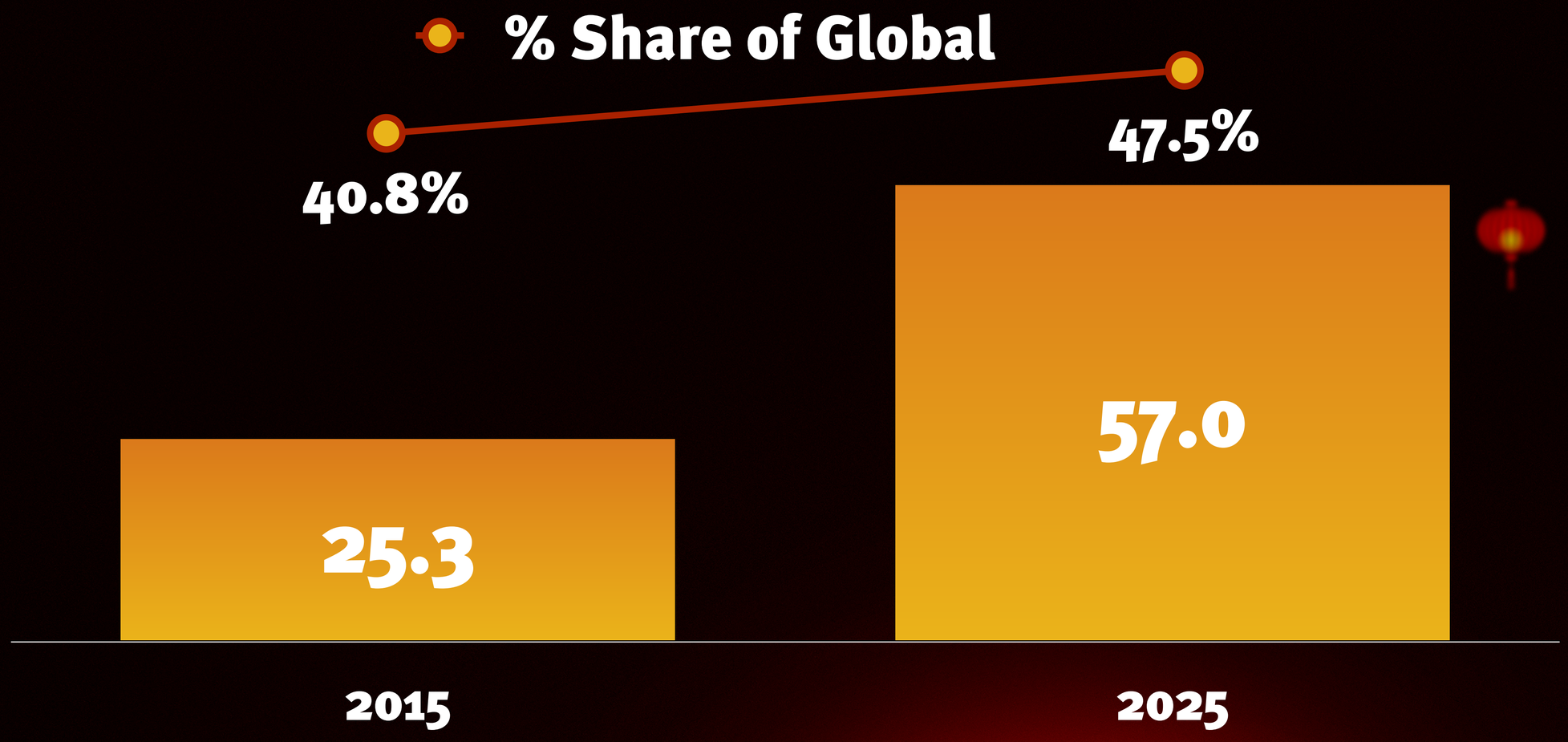
Holidays are the best time of the year – not to mention a moment for a little self-indulgence. For seventy years, the duty free store has been the first port of call for generations of holidaymakers. That's well worth celebrating.
Duty free & travel retail: part of the journey.

70 YEARS OF DUTY FREE 1947 — 2017

TFWA TAX FREE WORLD ASSOCIATION

RESOLUTE

DUTY FREE & TRAVEL RETAIL FORECAST ASIA PACIFIC (US$ BN)



SOURCE: GENERATION RESEARCH

DFWC
DUTY FREE WORLD COUNCIL
Serving duty free and travel retail worldwide

TFWA

etrc

ATRA
ASIA PACIFIC TRAVEL RETAIL ASSOCIATION

FDFA AFHT
FRONTIER DUTY FREE ASSOCIATION
ASSOCIATION FRONTIERE HORS TAXES

IAADFS

asutil
Asociación Sudamericana de Tiendas Libres

MEADFA
جمعية الشرق الأوسط و أفريقيا للأسواق الحرة
MIDDLE EAST & AFRICA DUTY FREE ASSOCIATION

RE-IGNITING OUR INDUSTRY

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WORLD
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CONFERENCE

1—6 OCT. 2017. CANNES

THE DUTY FREE & TRAVEL RETAIL GLOBAL SUMMIT

70 YEARS OF DUTY FREE
1947 — 2017

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THANK YOU

ERIK JUUL-MORTENSEN
PRESIDENT, TAX FREE WORLD ASSOCIATION