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From craft, through to affordable luxury,
Jessica Mason describes the global drinks brands
that have retained their relevance amidst the rise
of a travelling millennial demographic.

Spirited youth

n global travel retail, consumer's wants and desires are changing. When it comes to drinks, this is as relevant as anywhere else. Today, people require artisan, craft, and authentic products from companies that can tell a compelling brand story. Stories that can play a part in virtue signalling, or showmanship in the race for luxury – if drinks companies can tick both boxes, all the better.

"Today's international traveller is smart, sophisticated and knowledgeable. They demand authenticity and premium quality, but are looking for something special – something that will allow them to stand out as they share it with their friends and family," says Andrea Baumgartner, spokesperson, Distell (Green Village M64).

Why are consumers in pursuit of such items?

Because with small batch offerings, they trust the ethos. We are, in many ways, in a new dawn of 'the dubious consumer', especially when it comes to anything 'big business'. "Consumers are tired of multinational brands and are looking for brands they can trust and that are authentic," says John McDonnell, Managing Director International, Tito's Handmade Vodka (Blue Village H17).

They are looking for "handcrafted and premium spirits because people are drinking less but much better," agrees Thibault Feniou, General Export Manager, Distillerie Des Moisans (Yellow Village D40). So, how can the industry respond to this trend for 'craft' and, essentially, what do you need to know?

The "boom for natural, craft products still seems to remain in Europe and for this we have Crafter's

GLENDRONACH

GED 10 VEAR

Mand Single . Scotch Whish gins and Hobe Silver Filtered vodka," says Anna-Kai Törs, Export Marketing Manager, Liviko (Red Village J16), who observes that "for gin there is definitely room for growth." According to Törs, "consumers are more educated in various drinks than ever before" and so "they appreciate the natural flavours without chemical substances" but their sense of excitement means "they are eager to mix with various nontraditional mixers" and in spirits there is a "trend of artisan products with a twist – like our Crafter's Aromatic Flower Gin that changes colour when combined with tonic."

Jeroen Beijer, Global Director Duty Free, Swinkels Family Brewers (Harbour Village TRINAKRIA) agrees and highlights how "travellers are looking for authentic products with the true story to tell."

Plus, explains, Kamila Gręziak, Export Specialist, Chopin Vodka (Red Village K9), "consumers are looking for spirits that are naturally more flavourful (which is not the same as flavoured)," and this is "the same phenomenon that has led to the popularity of whisky, bourbon and gin, which has given our Young Potato spirit a cult following in Poland."

According to Luke Maga, Managing Director – Global Travel Retail at Distell International, the company is "increasingly finding that international travellers desire premium brands that are authentic in origin." But, warns Per Even Allaire, Deputy Commercial Director, Thomas Hine & Co (Red Village J24), "it is important to bring some fresh air to the category within travel retail in order to create interest and galvanise the demand." Allaire adds: "Our dedicated travel retail offer launched last year: Hine 8 Years Old and 10 Years Old is our contribution to fulfilling this target. These Cognacs are unique and very distinctive on many aspects: presentation, story behind and content."

Brown-Forman is launching The Glendronach Forgue Aged 10 Year Single Malt as a travel retail exclusive.

LABEL5





Chabot Armagnac is repackaging its core products to suit the everchanging market.



For its craft brands, Duty Free Global is targeting millennials.

For Marie Brizard Wine & Spirits (Blue Village D12), "thanks to the combination of the unique history of many liqueurs, anchored in a very local and handmade tradition, with small batch production and unaltered recipes for centuries, the liquor category is truly artisanal," says Stanislas De Parcevaux, Group Chief Marketing & Digital Officer, Marie Brizard, reminding that "ingredients origins, qualitative distillation, low ABV proposals and reduction of sugar are the centre of the industry's future development."

Franc Kopatin, Director Travel Retail & EE, Stock Spirits Group (Green Village M48), reminds that "there is also a growth in consumer interest in the use of perceived natural rather than artificial ingredients, sourced where possible, from identifiable, trustworthy local producers." All of this plays a part in authenticating a craft trend.

Maxime Rullier, Travel Retail Area Manager Europe & Africa, Zamora International (Green Village M67) highlights that its special edition packaging for its 'Made of Spain' Art Edition bottle for Liquor43 will be available from early October and this "pays tribute to the creativity and craftsmanship of Spanish artists and is inspired by the use of the traditional trencadís mosaic technique to build the most iconic landmarks of Barcelona Modernism."

Meeting the craft trend head on is Pink Pepper Gin, which has been designed to be "an entirely unique, intense and aromatic gin" that "will age and evolve both in the bottle and in the glass," says Rob Nichols, spokesperson, World of Patria International (Blue Village G13).

Nichols points out that, in addition, World of Patria is set to introduce the launch of Lionheart – a 4.5% ABV "artisan premium ale brewed to a 12th century style recipe" which has been "inspired by the legend of the iconic King Richard I" and will be "available in 500ml bottles."

While, for the likes of H. Mounier (Red Village K21), storytelling and provenance is the version of

Distell reminds that today's international traveller is smart, sophisticated and knowledgeable, and demands authenticity and premium quality.











Stock Spirits points out increased consumer interest in the use of perceived natural rather than artificial ingredients, sourced where possible, from identifiable, trustworthy local producers.



craft culture that people are really after. The company markets its position by reminding that legends often start with love stories and so LEGEND 1863 is simply based on a love story.

Similarly, other companies plot a narrative for each of their brands or new expressions. But, sometimes, rather than it being about the legend or ethos behind a product, it is based on its creation, its journey or how it came to be. For instance, as Gwen Fleming, Travel Retail Coordinator at Ian Macleod Distillers (Red Village L7) points out, the company is releasing "four new expressions – Glengoyne Cuartillo, Glengoyne Balbaína, Glengoyne PX, and Glengoyne 28 Year Old" and each of them "tell the story of the cask journey, from oak forests to Highland distillery".

The storytelling angle is also true of well-established brands adapting their vernacular to retell their origins with more appealing craft credentials. For instance, according to Nicola Dal Toso, Export Director, Rossi D'Asiago (Green Village L73), "the Antica Sambuca Classic follows an ancient recipe created in the mid-1950s, inspired by the craft production process inherited by Augusto Rossi, the son of the founder of Rossi D'Asiago, Giovan Battista Rossi." Dal Toso goes on to describe how the product is "made from only natural ingredients, distilled in an infusion of Anise Star fruits and other herbs in alcohol" giving the drink its "distinctiveness and uniqueness." All of it completely on trend now too.



New expressions are being showcased by Quintessential Brands, including: Bloom Lemon & Elderflower Gin, Bloom Jasmine & Rose Gin, Greenall's Gin Liqueurs, Greenall's The Perfect Mix, Opihr Gin & Tonic Collection: Opihr Stubbies, Champs-Alizé, and Feeney's Irish Cream Liqueur and Feeney's Salted Caramel

The halo effect of premiumisation

Other big trends sweeping the global drinks industry are a result of the halo effect of premiumisation. Now, premium cues have evolved to create offshoot trends in indulgence, decadence, luxury and exclusivity. This is especially true

of GTR products, which is already a

luxury arena.

Across drinks, this can be seen with high-end offerings and showstopping decanters and packaging for maximum standout. "We have a full range of French spirits with an innovative decanter range," points out Feniou.

Laplandia Vodka (Marine Village R2), meanwhile, is showcasing "one very special luxury item which has been created in honour of Laplandia's 10-year anniversary. The special item is engraved, handcrafted crystal glass with a dead spruce box. Contents are 50.5% wheat spirits with real cloudberries inside. Nothing like it has ever been made before," says Nadav David, Marketing Director, Shaman Spirits, proudly.

Consumers are "increasingly buying to indulge themselves because they want to explore new variants and different serves, so providing tasting

opportunities can be hugely influential in driving sales, says Simon Roffe, Managing Director, Global Travel Retail, **Halewood Wines & Spirits** (Harbour Village CLARA ONE).

In many ways, it could be said that consumers simply want to feel they have a foothold within the luxury market. After all, it is

Thomas Hine & Co's dedicated travel retail offer launched last year: Hine 8 Years Old and 10 Years Old is its contribution this year too.



reassuring for anyone to be reminded they are living their best life. This is celebrated in "the new gift tin 2019" from Underberg (Green Village M70), which "bears the inscription 'Underberg and Barbecue' successful combination of summertime joie de vivre," says Romina Gorres, International Sales Support, Underberg, showing that the company knows how to



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Ian Macleod Distillers is releasing four new expressions: Glengoyne Cuartillo, Glengoyne Balbaína, Glengoyne PX, and Glengoyne 28 Year Old.

tap into luxury and celebratory trends.

Alexandre Bussiere, Managing Director, Chabot Armagnac (Riviera Village RB7), explains that the retelling of stories can often help a rather high-end brand become more accessible in the eyes of the consumer. If a person can understand a product, then they can relate to it. This is one stage before buying. For instance, Bussiere describes how "Armagnac is a niche category sometimes perceived by consumers as complex. Therefore, our aim is to focus on our core range – Chabot VSOP Gold, Napoleon and XO, and make it easier to understand from a consumer

point of view. We will also showcase some of our more luxury Armagnac, such as Chabot Extra and Chabot Prestige N8, in key locations. As part of this effort, we are developing a new marketing toolkit that we'll be presenting to our partners in Cannes."

In other cases, the spirits themselves can do the talking. And Patrón Spirits International, which is being exhibited by Bacardi Global Travel Retail (Bay Village Bay 21), has displayed enviable confidence in its product offering for years, knowing that quality sells and it's as simple as that. "Travel retail consumers are looking for high-quality, sophisticated luxury brands, which is why Patrón tequilas and liqueurs fit so perfectly in this channel," says John Kilmartin, Vice President, Global Duty Free, Patrón Spirits International.

One of the greatest things about the sector has got to be the way people work together to get the most out of it. "The Family Brands Alliance, now comprised of three family-owned brands, is already seeing concrete results of the unique partnership, with new listings from around the world. Last year at TFWA World Exhibition & Conference, Behn DANZKA and Pallini Limoncello became the founding members of the alliance. Earlier this year, Bache-Gabrielsen became the third brand to join the Family Brands Alli-



From Stolichnaya, we will be enjoying some new, crisper botanicals with the company having revealed plans to show its brandnew Stoli Cucumber, which is a pure, clean and natural tasting cucumber vodka and also the first new Stoli flavour introduced since 2012.

ance. Today all three family companies are experiencing the benefits of the synergies they create by working together and expect to expand the membership," says Philippe Biais – Export Director, Waldemar Behn (Green Village H52).

Sometimes there is no greater marketing strategy than simply putting heads together. It is a heartening approach. "In product news within the Alliance, Bache-Gabrielsen is launching a new VSOP Triple Cask Cognac in Cannes," Biais adds.

Also being showcased in Cannes,
La Martiniquaise (Yellow Village G54)
"will focus on a brand new travel
retail exclusive range for Glen Moray
Elgin Signature Single Malt Scotch
Whisky, the new premium range for
the historic St Raphaël French Apéritif,
and a premium range enlargement
for N° 10 Scotch Whisky worldwide
brand, LABEL 5," says William
Ploquin-Maurell, International Brand
Manager – Corporate Communication,
La Martiniquaise.

In the meantime, Halewood Wines & Spirits is showcasing its range of artisanal gins, including Whitley Neill, Marylebone and the City of London Distillery. "We will also be launching our new spiced rum range, Dead Man's Fingers, into the travel retail business," says

Other things to look out for include the unveiling of "striking





Chopin Vodka believes that consumers are looking for spirits that are naturally more flavourful (which is not the same as flavoured).



Consumers are tired of multinational brands and looking for brands they can trust and that are authentic, like Tito's.



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Antica Sambuca is made from only natural ingredients, distilled in an infusion of Anise Star fruits and other herbs in alcohol, giving the drink its distinctiveness and uniqueness.

Shaman Spirits is showcasing one very special luxury item, which has been created in honour of Laplandia's 10-year anniversary.

new bottle designs" for Chase Distillery's range of single-estate spirits "unifying the vodka and gin families under the Chase name, while highlighting their provenance and character," explains Katherine Berry, Business Development Manager Global Travel Retail, Chase Distillery (Harbour Village Excelerate Z). "As well as a gin category explosion, we are seeing exceptional growth within the flavoured gins category," she adds, pointing out that the "Chase Pink Grapefruit and Pomelo Gin has been incredibly successful over the summer, gaining listings within Chase GTR channel for O3 and O4." and admits that Chase has plans to also extend its flavoured gins portfolio, which will be launched in Cannes.

From Gonzalez Byass (Red Village J12), its introduction of "The London No1 Gin Traveller Edition for all markets and the travel edition of Tio Pepe in one litre format" shall be rolled out. "Also, our new range of La Copa Vermouths - White, Red and Reserva - stand out from the crowd as they are one of the few Sherry based Vermouths on the market," says José Carlos Rodríguez, International Brand Manager, Gonzalez Byass.

"At TFWA World Exhibition & Conference, Heineken International will be showcasing highlights from its portfolio of international brands, with a particular focus on brands including: Heineken 0.0, Tiger Bee, Lagunitas, Strongbow Cider and Red Stripe," says Sofia Gervaso, spokesperson, Heineken International (Red Village L10), showing there is confidence not only in the low alcohol sector, but also in innovative dispense methods that could be used more widely across

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BACARDÍ

BACARDÍ

Bacardi used a
digital campaign to
target millennials at
London Luton
Airport and London
City Airport to
celebrate the launch
of Bacardí
Añejo Cuatro.

venues and within retail spaces.

Gouze.

This year Maison Ferrand (Yellow Village E34) has "a particular focus on three outstanding SKUs", according Matthieu Gouze, Sales Director Europe, APAC, Africa & Middle East, Maison Ferrand. These include a new packaging design for Citadelle Gin, while the rest of the focus will rest squarely on "Ferrand Cognac 10th Générations and Plantation Xaymaca Special Dry Rum," says

"New expressions that will be showcased by Quintessential Brands at TFWA World Exhibition & Conference include: Bloom Lemon & Elderflower Gin. Bloom Jasmine & Rose Gin, Greenall's Gin Liqueurs, Greenall's The Perfect Mix. Opihr Gin & Tonic Collection: Opihr Stubbies, Champs-Alizé and Feeney's Irish Cream Liqueur and Feeney's Salted Caramel," says Jonathan Marsh, Managing Director, **Quintessential Brands Spirits** Solutions, EMEA & GTR (Green Village M71).

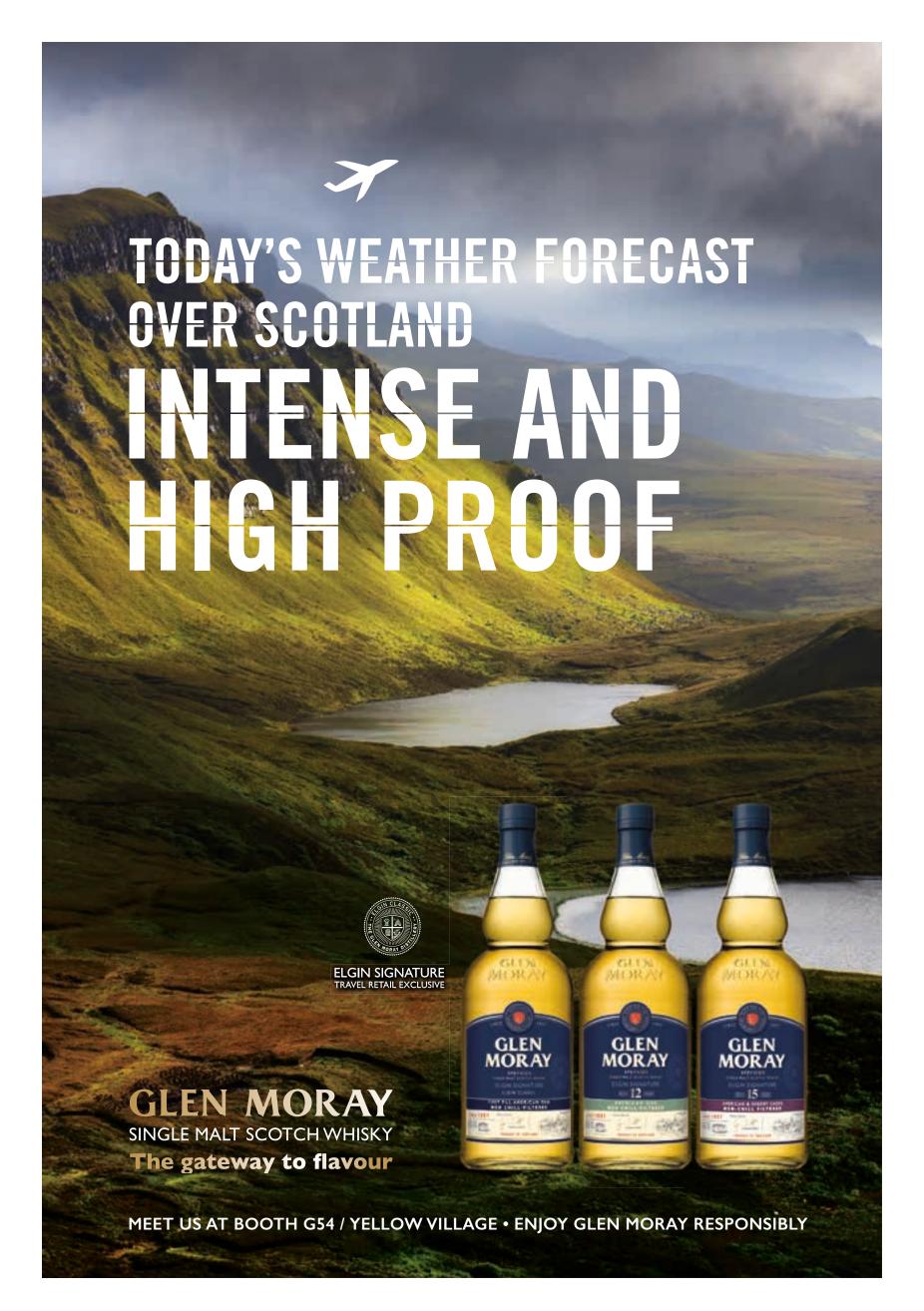
Meanwhile, the stage is set for news that Brown-Forman (Beach Village Beach 03) has "an exciting announcement to make" in Cannes – since the company will be introducing two new members within its travel retail single malt portfolio. "While I can't at this time address the announcement we will make, I can discuss this year's introductions which are from the award-winning Glendro-

the award-winning Glendronach Distillery. The Single Malts from this Speyside distillery are renowned for their taste and character and these are no exception. Our twin offerings in Cannes include The Glendronach 10-Year-Old and the Glendronach 16-Year-Old," explains Colton Payne, spokesperson, Brown-Forman. Swinkels highlights how travellers are looking for authentic products with a true story to tell.



Maison Ferrand introduces a new packaging design for Citadelle Gin, while the rest of the focus is on Ferrand Cognac 10th Générations and Plantation Xaymaca Special Dry Rum.







Islay Mist perfectly bridges the gap for newcomers to peated whiskies.

William Grant & Sons caters for the younger adult looking for on-trend brands such as Monkey Shoulder.

From Stolichnaya we will be enjoying some new, crisper botanicals with the company having revealed plans to show its "brand new Stoli Cucumber" which is "a pure, clean and natural tasting cucumber vodka" and also "the first new Stoli flavour introduced since 2012," says Jean-Philippe Aucher, Global Travel Retail Director, Stoli Group (Beach Village Beach 06).

"International Beverage will be unveiling new single malt Scotch whisky and gin products, each and all designed exclusively for travel retail for 2019," says James Bateman, Sales Director, Global Travel Retail, International Beverage (Marine Village S2), adding that the company has plans to "focus on a complete new range of three expressions for Old Pulteney single malt Scotch whisky [which will be] available for 2019, coordinated with the global re-launch of the Old Pulteney brand" as well as "also introduce Caorunn Gin's first-ever line extension

and TR exclusive, Gin Master's Cut 48% 1L, [which will be] available for international ('export') markets from October 2018 onwards". Bateman reveals that International Beverage will "also feature a new premium expression for Speyburn single malt, a new 16 Years Old 1L exclusive" at the show.

Château du Tariquet (Yellow Village B28) has revealed plans to "exclusively present the Pure Folle Blanche range, made of three cask strength Bas-Armagnacs aged for 8, 12 and 15 years," says Gaëlle Maillard, spokesperson, Château du Tariquet.

Meanwhile, from Fraternity Spirits World (Blue Village G3), we will see "new products such as Conde de Cuba authentic Cuban artesian rum, Ron Prohibido solera 15, Ron Reserva 22 – a special blend of 22 different barrels, Corralejo Ultra-premium 1821 extra anejo, Chocolate Cream Horus and Mezcal Espanta Spiritus," says Raffaele Berardi, spokesperson, Fraternity Spirits World.







Ingredients origins, qualitative distillation, low ABV proposals, and reduction of sugar are the centre of the industry's future development, reminds Marie Brizard.

Tech-savvy, price-aware, brand-conscious

In the race to remain relevant, targeting millennials, as well as not alienating a more mature core audience, has become an artful balancing act for many a drinks brand owner.

"They are certainly more tech-savvy, price-aware, and brand-conscious, and, in many ways, have skipped standard categories and moved straight into the ultra-premium spirits set.

They very much know what they want," says Kilmartin. This, admittedly, makes them a very powerful demographic.

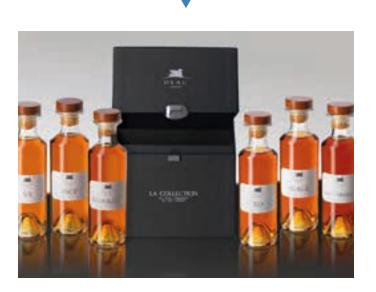
"We have observed an evolution concerning the travel retail industry with a development of the low-cost offers and the emergence of new consumers such as millennials. We think that this evolution will have a positive effect on our business with new offers for an emerging target," says Ploquin-Maurell. But the question is – how does a company target millennials when they have such a broad portfolio of products?

William Grant & Sons (Golden Village GO2) seems to have the right idea – flagging up the cool and more quirky brands, while also reintroducing classics that may not be on the radar at all.



La Martiniquaise is showcasing the new premium range for the historic St Raphaël French Apéritif.

Distillerie des Moisans highlights the trend for handcrafted and premium spirits, reminding that people are drinking less, but better.









Travel retail
consumers are
looking for highquality, sophisticated
luxury brands, which
is why Patrón tequilas
and liqueurs fit so
perfectly in this
channel.



"Our targets depend on the brand in question, so it's impossible to generalise," says Ed Cottrell, Managing Director Global Travel Retail, William Grant & Sons. "The target for Monkey Shoulder is very different to that of The Balvenie. With our portfolio of brands, including Hendrick's, Glenfiddich, Tullamore Dew, Sailor Jerry, Drambuie, Grant's and those already mentioned, William Grant & Sons targets all adults globally seeking quality spirits from the standard value litre of blended whisky to the collector looking for a rare and exclusive Glenfiddich expression. We cater for the younger adult looking for on-trend brands such as Monkey Shoulder to the gift-buyer looking for a travel retail exclusive, such as the Glenfiddich Cask Collection. We're also keen to introduce younger adults to more traditional drinks, such as Drambuie, and this year sees us promoting the brand's mixability as part of the cocktail craze with Drambuie Collins."

Another tack employed by drinks brand owners is to create something that is approachable to novices to introduce them to more complex categories, so they have something to trade up to when the time is right. For instance, "smoky whiskies are gaining ground even in markets traditionally considered to be anti-peated whiskies. This is a great opportunity for us, as Islay Mist perfectly bridges the gap for newcomers to peated whiskies," explains John Scott, Export Sales Director, MacDuff International (Green Village L64), who deftly sees the bigger picture.

"For our craft brands, we're targeting millennials. For the more traditional brands and products we feel there is room to grow in the bourbon sections and we then target more mature bourbon drinkers," says Nathalie Roelands, Sales Manager, Duty Free Global (Blue Village H17), while over at Bacardi Global Travel Retail, its recent partnership with Lagardère



Gonzalez Byass is introducing The London No1 Gin Traveller Edition.



Waldemar Behn is showcasing a new VSOP Triple Cask Cognac from Bache-Gabrielsen at TFWA World Exhibition & Conference.









Travel Retail worked really well. Bacardi used "a digital campaign to target millennials at London Luton Airport and London City Airport to celebrate the launch of Bacardí Añejo Cuatro," explains Mike Birch, Managing Director & Vice President – Global Travel Retail and Commercial Development, revealing that the campaign included invitations being "served direct to mobile devices."

Julie Winterden, Marketing Director, Bacardi Global Travel Retail, adds: "We know that millennials – who represent over 20% of the entire population (source: Nielsen's Total Audience 2017) – will choose to enter a store when there's the right kind of disruptive, engaging experience, preferably one integrating digital and physical worlds. This is a key strategy for Bacardi Global Travel Retail."

And it seems all of the big guys are having a go. Whyte & Mackay (Green Village M52), for instance, admits that it has "been fortunate to play a part in the emergence of a contemporary whisky category" with "brands such as our own Shackleton, alongside Monkey Shoulder" the company has "created a new segment that is hugely appealing to millennials" and "these new products transcend established whisky categories and classifications, and have proved very popular with a new generation of consumers," says Richard Trimby, Director Global Travel Retail, Whyte & Mackay.

But it does not seem to matter if the product is new or old; it is simply how it is marketed to younger consumers. One example might be how "Chabot Armagnac has been recognised as a traditional, high-end and luxury spirit for mature consumers, however it tends to have renewed interest for the younger spenders. In order to adapt to the new trend, Chabot is repackaging its core products to suit the ever-changing market," says Suzanne So, Senior Marketing Executive, MG Cellars.

This seems to have worked at making them more appealing than ever before, and, importantly, relevant to the next generation of travellers. The evolution of the global stage

continues and with this next development comes enthusiasm for all the discoveries that international travel can present.

"In a wonderful development for our channel, travel retail shopping has now become an integral part of the international travel experience. Travellers are building time into their schedule to allow shopping before departure. They arrive at the airport looking for specific products, as they have already done their research online, so proper pricing is also important. This plays well for authentic and premium products," explains Baumgartner, identifying how "the age of gimmicks and lowcost, poor quality products is passing quickly."



Château du Tariquet has revealed plans to exclusively present the Pure Folle Blanche range, made of three cask strength Bas-Armagnacs aged for 8, 12 and 15 years.

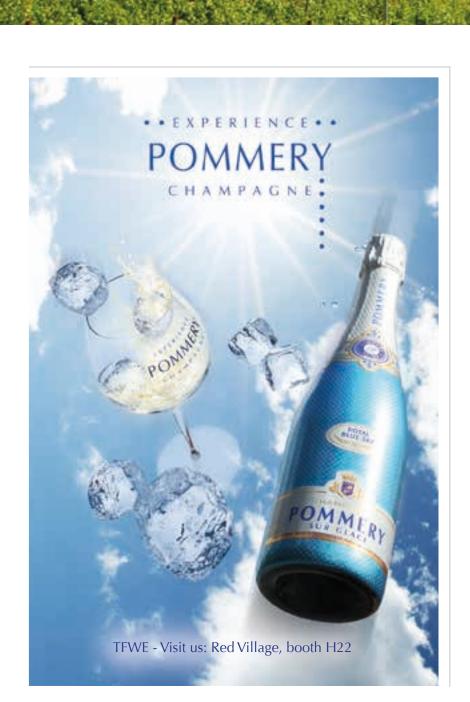


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Grape expectations



here are key drivers to growth within the global travel retail wine sector. Experimental wines with stories to tell, exceptional wines where quality and prestige are at the forefront, as well as trends aligning with consumers being more eco-aware. Along with celebratory fizz and a thirst for premium rosés, there are a lot of wines that are appealing to travellers' taste buds. Find out which ones are hitting the mark, here.

"Compared to domestic markets, wine is underrepresented in global travel retail, 52% of travellers drink wine and Champagne domestically, yet only 12% purchase in airports, so we know globally there is still significant room for growth," says Barry Galloway, General Manager of Global Travel Retail, Treasury Wine Estates (Bay Village Bay 18).

So, what do those who peruse the wine available want to see? According Maisons et Domaines Henriot (Red Village J3), they are looking for items they cannot find anywhere else. "Exclusive products are a growing trend overall, especially among those who travel," says Samantha Luna, Area Manager Jr. Maisons et Domaines Henriot.

Let's look at the trends. It is fair to say that, when it comes to grapes, we're really after something fairly interesting. Something where either the story or its history is compelling, or where the wines created are able to tease the palate in some way.

Trend: Experimental

"Discovery and experimentation are key drivers of millennial and luxury consumer choices. We see that shoppers are increasingly seeking out unique and interesting products that reflect their values," Galloway comments.

From Diverse Flavours (Red Village L34), we can see that its "range of South African wines offers something different and challenges the norm," says Anthony Budd, Managing Director, Diverse Flavours. "Cederberg, South Africa's highest winery at 1,000 metres above sea level is from one of the most remote wine producing areas in the world, and is still produced by the fifth generation of the Nieuwoudt family," adds Budd, highlighting a real selling point for the wines. Plus, according to Budd, there are lots of reasons why the Diverse Flavours ranges stand out from the crowd. "The award-winning Groot Constantia wines [are from] South Africa's oldest winery dating back to 1685," he says, explaining that "the winery has been producing wine for 333 years" and was "founded on the side of Table Mountain in Constantia near Cape Town, the Grand Constance Desert wine was drunk by Napoleon, and written about by Dickens and Jane Austen". All good reasons to try them.

From Torres (Blue Village D3), we will see "novelties like the Reserva wine from Altos Ibericos," says Xavier Armengol, Chief Commercial Officer, Bodegas Torres, who admits that the wines are all very different and deserve to be tried. They are "from our bodega in Rioja, our new Super Premium Chardonnay Sons de Prades from our single vineyard of Malanda, Camino de Magarín – our flagship Verdejo wine from our Bodega Magarín in Rueda," he adds.





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Trend: Exceptional

The next trend is for wines that sell themselves with their sheer winemaking prowess. For instance, William Fèvre from Maisons et Domaines Henriot. "Our Cellar Master, Didier Séguier, received the 'White Winemaker of the Year' award on the 34th edition of the International Wine Challenge last July in London," says Luna. "This wine challenge is known as one of the most prestigious in the world. Almost 14,000 wines are blind tasted and judged for their faithfulness to style, region and vintage. This title is a reward for the patient work that has been done by Didier Séguier and his team, since 1998. It also confirms that Domaine William Fèvre is one of the most renowned estates in Chablis."

From Zonin 1821 (Blue Village C5), the next phase is firmly focused on high-end wines. "Domenico, Francesco and Michele Zonin are proud to present their new family adventure in Chile, introducing Dos Almas wines," says Alessandra Zambonin, International Press & Communication Manager, Zonin 1821. "The Zonin family began its love affair with wine in 1821, in the first stage as small-scale vintners in their native Veneto region. A second chapter of this romance started at the end of the 1960s, when the Zonin family enacted a strategy based on the acquisition of nine Italian estates and vineyards with great winemaking potential, and on the production of high-quality wines."

She adds: "Now the third phase of Zonin 1821 is to come. After in-depth research all around the world, the ideal conditions for the production of high-end wines were found on the other side of the planet. A family trip to South America six years ago was a revealing moment, and Chile was chosen for its perfect terroir, considered a 'viticultural paradise'."

Galloway reminds that, at this year's TFWA World Exhibition & Conference, Treasury Wine Estates continues to focus on one of its most globally-demanded brands: Penfolds. "This is the year to discover more about Penfolds – from our exceptional white wines through to our exclusive new release with Penfolds Special Bottlings, Penfolds is everevolving to meet the needs of its consumers," says Galloway. "Penfolds Special Bottling Lot 1990 is exclusive to travel retail. From launch in July 2018, we have been bringing the brand to life in travel retail, to drive consumer curiosity and entice purchase. Additionally, the travel retail exclusive of Penfolds Cellar Reserve is a range of handcrafted, limited

 Bouchard Père et Fils is presenting a bicentenary vintage release from Champagne Henriot.





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"

Barry Galloway, General Manager of Global Travel Retail,
Treasury Wine Estates:

"Compared to domestic markets, wine is underrepresented in global travel retail, 52% of travellers drink wine and Champagne domestically, yet only 12% purchase in airports, so we know globally there is still significant room for growth."

"







Fournier Père et Fils is



From Diverse Flavours, we can see that its "range of South African wines offers something different and challenges the norm," says Anthony Budd, Managing Director, Diverse Flavours.



production wines, created in the spirit of innovation and diversity, and will always be worth seeking out for anyone who appreciates boldness and diversity in their wine." Plenty to see and taste over, that's for sure.

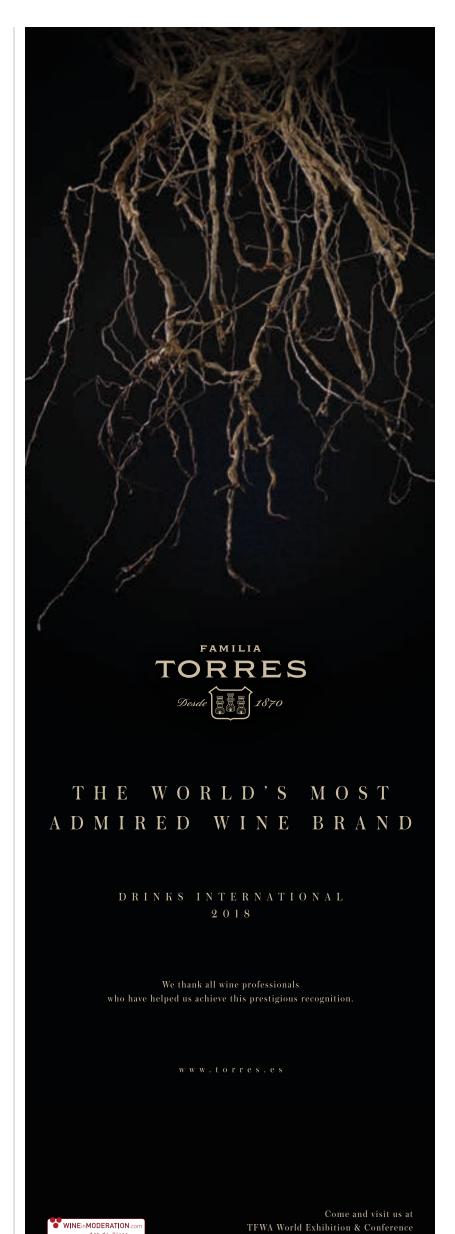
Budd, on the Diverse Flavours stand, also promises to showcase the company's "premium South African wines from Avondale, Cederberg, Deetlefs, Delaire Graff, Ernie Els, Ghost Corner, Groot Constantia, Kleinood, Mt Vernon, Napier and 88 Vineyards" with all eyes on the quality of these wines – it seems consumers are going to be in for a treat in travel retail very soon.

From Symington Family Estates (Blue Village D14), we will see its Ports and Douro Wines "including Graham's, Cockburn's, Dow's, Warre's and Altano, plus a series of initiatives specifically produced for the travel retail sector," explains Patrícia Martins Santos, spokesperson, Symington Family Estates.

"The Hardys range will benefit from renewed focus during our 165th anniversary year, thanks to a premium anniversary bottling, complemented by some old and new offerings across the range," adds Rupert Firbank, Commercial Director, Global Travel Retail, Accolade Wines (Yellow Village D26), showing that the wine company has created an offering that

From Symington Family Estates we will see its Ports, including Graham's, plus a series of initiatives specifically produced for the travel retail sector.





Blue Village D3



Freixenet Prosecco D.O.C.G. has proved exceptionally successful, driven both by the reputation of the Freixenet name and the popularity of prosecco generally.

showcases its positioning as a leader within the sector.
From Fournier Père et Fils (Red Village K25), the
company is "observing a strong demand for two to
three years for the higher-end, terroirs-driven cuvées
from our estates," says Thierry Merlet, spokesperson,
Fournier Père et Fils. Everything is geared towards

Trend: Ecological

high-end discernment.

Organic, biodynamic and sustainable trends are the order of the day too. "A big part of our vineyard is treated with organic practices. We have a 'High Environmental Value' certification," says Luna at Domaines Henriot.

For Gonzalez Byass (Red Village J12), the trend is generating listings. What is good for the consumer is



Accolade Wines' Hardys range will benefit from renewed focus during its 165th anniversary year, thanks to a premium anniversary bottling, complemented by some old and new offerings across the range.









BOLD CHARACTER SINCE 1872

good for the winemaker too. "Heinemann has listed Tio Pepe, Beronia Organic and Beronia Reserva. Those wines will mostly be sold at Oslo Airport. They are also selling to some border shops, militaries, diplomats, cruise liners, ferries and shops," says José Carlos Rodríguez, International Brand Manager, Gonzalez Byass.

Thibaut De Braquilanges, Head of Airlines - Cruise Lines & Duty Free Direct, Gérard Bertrand (Red Village K11), is in agreement that the "development of organic & 'free from' wines" is now a big trend. "Gerard Bertrand is a committed winemaker, deeply attached to the terroirs of the Languedoc Roussillon, crafting fine wines that are renowned and acclaimed by wine lovers the world over. This producer of wines of excellence is a fervent defender of environmental protection and a world pioneer in biodynamic wines," says De Braquilanges, adding that the company will be "offering an incredible collection of multi-awarded wines (sparklings, reds, whites, rosés, varietals, organics, sulfite free wines, biodynamic, appellations wines and icon wines)" one among these will be "Cigalus: one of our iconic estates, where we first used biodynamic farming," he adds.

In terms of eco-values, Diverse Flavours showcases its "Avondale from Paarl" since Avondale's ethos, Terra Est Vita, means 'Soil is Life' [and this] guides its approach to the environment. According to Budd, this means it "views it as a dynamic living system where soil, water and energy; plants, animals and people; even the buildings, are part of a complex web of interdependent networks." And, since Avondale pioneered the BioLogic methodology that incorporates certified organic, biodynamic and scientific farming principles in order to create living systems naturally," it is a big player on the eco-wine scene.

"Organic and biodynamic wines is one of the biggest trends we see in the market today," comments Karine Taillandier, spokesperson, Domaine Jean-Marc Brocard (Green Village H60), adding: "For our part, we have practised organic and biodynamic methods in the vinevard since 1997 [and have] 50 hectares [that]

are farmed using biodynamic methods; 75 hectares [that] are certified Organic (AB label) and 35 hectares currently being converted to organic viticulture."

Taillandier explains that "the estate Jean-Marc Brocard has been producing wines in the heart of the Chablis region since 1973. These wines are made with love and strict attention to quality to offer all the strength and charm of nature". Plus, it offers "a virtuoso of Chablis, Chardonnay in its purest form, Domaine Jean-Marc Brocard applies the principles of organic agriculture scrupulously since 1997 to give full expression to the richness of the terroir".

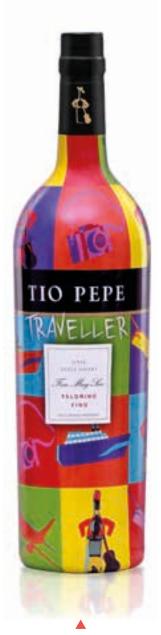
Trend: Sparkling varietals

"We see that sparkling is a big trend at the moment," says Armengol at Torres, while Luna at Domaines Henriot offers up its Cuvée prestige, replacing Enchanteleurs with the new Cuvée Hemera 2005 vintage. "The wine has spent a formidable 12 years on the lees," says Armengol. "Hemera's fresher, more floral style, it represents a complete change of vision for Henriot's prestige cuvée, like Enchanteleurs, Hemera is a 50/50 Chardonnay/Pinot Noir blend, sourced from six Grands Crus: Verzy, Verzenay and Mailly for Pinot Noir; and Chouilly, Avize and Le Mesnil-sur-Oger for Chardonnay, with a dosage of 5g/l," says Armengol, adding that "Cuvée Hemera's strengths are its finesse, purity and remarkable youth, with notes of lime blossom, honeysuckle and jasmine leading into cooked citrus flavours and honey."

According to Liza Madrigal, Marketing Director Global Travel Retail, Freixenet (Red Village J7), "the sparkling wine category continues to have a great momentum globally. Prosecco has been one of the main drivers behind this and, as consumers become more receptive to different types of sparkling wine, brands like Freixenet are providing consumers with more and better choice."

Philippe Jamme, Global Travel Retail Sales Manager, reminds how "prosecco continues to be a key driver in the growth of the sparkling wine category





Heinemann has listed Tio Pepe, says Gonzalez Byass.

and the introduction of our Freixenet Prosecco D.O.C.G. last year has proved exceptionally successful. The uptake in global travel retail has been encouraging, driven both by the reputation of the Freixenet name and the popularity of prosecco generally, and we've secured listings with key retailers in Europe, the Middle East and Asia."

In addition to this, one of the most iconic products in the category is Freixenet Cordon Negro, which is popular with Cava drinkers all over the world. "Cordon Negro Brut has allowed Freixenet to continue engaging consumers all over the world as part of its mission 'to help the world celebrate more of life's special moments'. In line with this vision, and to maintain its number one position in the sparkling wine category, Freixenet is relaunching its iconic black bottle with the introduction of Cordon Negro Gran Vintage, exclusively created for the GTR channel and available from this autumn to all regions," reveals Madrigal, showing the fizz category is alive and bubbling.

Trend: Premium rosé

Gerard Bertrand's De Braquilanges highlights that the trend for "premium rosé wines" is upon us. From this winemaker, we are seeing nods to this trend in the form of "Chateau La Sauvageonne La Villa: 2017 vintage has been awarded by the Drinks Business for the second year in a row as Best Rosé in the World with a top score of 97/100."

From Freixenet, building on the launch of Freixenet Prosecco D.O.C.G., the company is adding to its Italian offer with Freixenet Pinot Noir Rosé Sparkling. "The introduction of Freixenet Pinot Noir Rosé Sparkling provides a complete offer for our customers and target consumers, which is key for our continued growth this channel," says Madrigal.

Trend: Global appeal

Looking outwards towards the rest of the world and forming a map of where wines are selling best across GTR, each company has its own distinct plan and focus.

Galloway identifies that "Australia is a key region for Treasury Wine Estates, given it's the home market for our leading brands Penfolds and Wolf Blass." But observes how "travel retail exclusive tiers, such as Penfolds Cellar Reserve and Wolf Blass Private Release, have performed extremely well across all regions, and demand for premium wines continues to grow in North Asia." Looking towards the future, "in line with the expected passenger growth, Asia remains a priority region and our growth reflects this opportunity," says Galloway, adding that "Treasury Wine Estates' focus on driving the footprint and consumer recruitment into our USA wine portfolio is delivering strong results, and Penfolds Special bottling will be another opportunity to further engage shoppers."

Freixenet sees "potential across the globe, but particularly in Asia and, most notably, China. Our wines are sold in more than 120 countries and our top five markets domestically (outside Spain) are Germany, the US, France, the UK and Japan," adds Madrigal.

But Galloway implores that "Chinese shoppers will remain an important shopper segment within travel retail" and for this reason, companies and retailers need to "continue to ensure we have offerings that meet their needs. As a global business, we know that not all buyers have the same needs and this can vary by travel retail category." Galloway explains that in 2018. Treasury Wine Estates has embarked on its third wine and champagne shopper study, following on from the 2014 and 2016 studies. "This study enables us to improve our understanding regarding the key drivers and barriers of shoppers in wine, and remains key in unlocking insights that underpin the way we position our wines in market with our retailers. The 2018 study will also enable Treasury Wine Estates to better understand buyer typologies (beyond nationality) and their affiliated needs, to ensure we can tailor our portfolio and activation $% \left(\mathbf{r}\right) =\left(\mathbf{r}\right)$ strategy to key buyers to drive greater conversation in market," he explains.

Budd, however, has a simpler plan for global wine expansion: "I believe the duty free business works like a set of dominoes – once you get one listing, another will follow and so on. This is our strategy – one domino at a time."

Zonin is proud to present its new family adventure in Chile, introducing Dos Almas wines.







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J. Cortès (Harbour Village EVIDENCE) is showcasing its latest travel retail exclusive novelty. Nub is a line of short, stout and well-lived smokes blended to capture the perfect essence of a cigar. These cigars are completely made by hand with densely packed long filler. Especially for travel retail, the selected cigars have aged for more than one year. The cigars come in a premium metal tube and a beautifully designed cardboard box with information about the tobaccos used for filler, binder and wrapper. The Nub travel retail exclusive contains four cigars with delicate and fine cigar wrappers – Maduro, Sun Grown, Connecticut, and Cameroon.

Cutting through the haze:

Thriving in the tobacco category in 2018 and beyond

or some, exclusivity in travel retail is still the aim – and the name – of the game. In an increasingly hectic marketplace, and with so many obstacles to overcome, to stand still is to fall behind. What has become clear in 2018 is that tobacco brands must engage in creativity, in parallel to ensuring that the quality of their offering never falters, in order to stay ahead of the pack.

Around the world, taste and presentation preferences vary. But the trend to keep innovating with new and exciting tobacco products will help brands win in global travel retail. What other trends are tobacco operators making the most of?

Current trends

Jim Young, CCO Oettinger Davidoff AG (Bay Village Bay Terrace T1), says the company adapts its approach based on the market and likely consumer. For example, in global travel, consumers are increasingly pressed for time, so the general trend is in favour of shorter cigars. That is why Oettinger Davidoff AG launches innovative blends in its portfolio in both small and large formats, including Corona, Robusto and Toro.

The tobacco category continues to be a cornerstone of the travel retail environment. It is the third-largest core category, with total reported sales of over US\$7 billion in 2017. But what does it take for brands – whether they be large or small, or operate in cigars, cigarettes or shisha – to thrive in travel retail? We caught up with a selection of exhibitors to get inside the minds of a few of the key players.



Agio Cigars (Yellow Village H49) is introducing an exclusive Balmoral Añejo XO Travel Retail gift box and 4-count cigar packs. The exclusive wooden gift box features five cigars: two Petit Robusto FT, two Rothschild Masivo, and one Gran Toro. Part of this travel retail concept is convenient 4-count cigar packs that feature the same three vitolas.

"We create excellent cigars and incomparable brand experiences for our aficionados," says Young. "We also realise that younger travellers, who are around 30 years old, highly value a quality time while shopping. An engaging product — and brand know-how, provided by the staff at points of sale across the globe — or easy access to information, contributes greatly to making their personal experience a success. It is why we consider exciting cigar or gifting promotions featuring specific travel retail exclusives to be must-haves in the sector."

Rawan Elayyan, Brand Manager at Mazaya (Yellow Village H53), points to the continued rise in the trend of smoking shisha itself – and the wider café culture – as an important factor in Mazaya's business success (the company reported triple-digit growth at the beginning of the year). "We are all aware of growing restrictions for all types of tobacco smoking, but the trend for shisha continues on an upward curve."

Rawan cites a recent study by Wise Guy, in which it is said the hookah (shisha) tobacco market is expected to see growth of almost 18% by 2025. Driving this growth is the increased themebased café culture, and the fact that shisha comes in a wide variety of different flavours, which attracts younger adult consumers. According to that report, Europe is expected to dominate growth within the global shisha tobacco market followed by North America, with Latin America demand also growing as the café culture grabs hold. Rawan has called on retailers to throw their support behind shisha. "It really makes sense for global travel retailers to get onboard the shisha market phenomena and dedicate some floor space to this growing trend. It is an opportunity not just



2018 is cause for celebration for Davidoff, as it celebrates the 50th anniversary of its iconic white cigar brand. To commemorate, Davidoff has organised a very special limited edition, which is on show at TFWA World Exhibition & Conference.



for airport shops, but for border shops, cruise ships and ferries as well."

Gemma Bateson, Worldwide Duty Free (WWDF)
Corporate Affairs & Communications Director,
JT International (Marine Village T1), believes
an increasing trend is that of the multi-sensory
experience, moving outside the retail norm. "We've
seen an increase in demand for multi-sensory in-store
experiences to excite the shopper, and through our
continuous efforts on working closely together, as
a trinity – brands, retailers and airports – we can
provide the best experience for the tobacco shopper,"
he says.

Packaging innovation, such as JTI's Camel Caribbean 'destination packaging', is extremely popular, but there is always scope to innovate the product itself. "The current business environment shows that the potential 'Reduced Risk Products' category continues to increase," Bateson adds. "As part of this category, JTI continues to innovate to fulfil the diverse consumer needs, and continues to invest heavily in both the heated tobacco and electronic cigarette categories with our brands Ploom and Logic."

KT International (Marine Village S14) Marketing Director Stuart Buchanan thinks that, to a certain extent, premiumisation is an important trend. He comments that in recent years tobacco has bucked the premiumisation trend, but that recently he has noticed a change with new, more innovative premium offers on-shelf.

And what of consumer tastes. Have the industry insiders on our panel of experts noticed a recent evolution? Oettinger Davidoff's Young says the taste preferences of cigar lovers are in constant flux, but the majority play in the mild to medium segment. "Customers around the world are increasingly demanding unique brand and shopping experiences – at all times and irrespective of location. As the innovation leader in the premium cigars sector, we not only strive to guarantee quality and consistency, but also to delight customers with new taste experiences and tobacco blends from all corners of the world. This also includes confronting the changing market environment in good time."

KT International's Buchanan adds: "Consumers are looking for more. As a category, tobacco hasn't seen much in the way of innovation in the last 20

Oettinger Davidoff is introducing the Winston Churchill Travel Humidor limited edition, while next year it is looking forward to launching the Winston Churchill Traveller Edition.



years to justify significant price increases. In the last five years, however, consumers have been seeking more and more innovation at a price point that is not excessive."

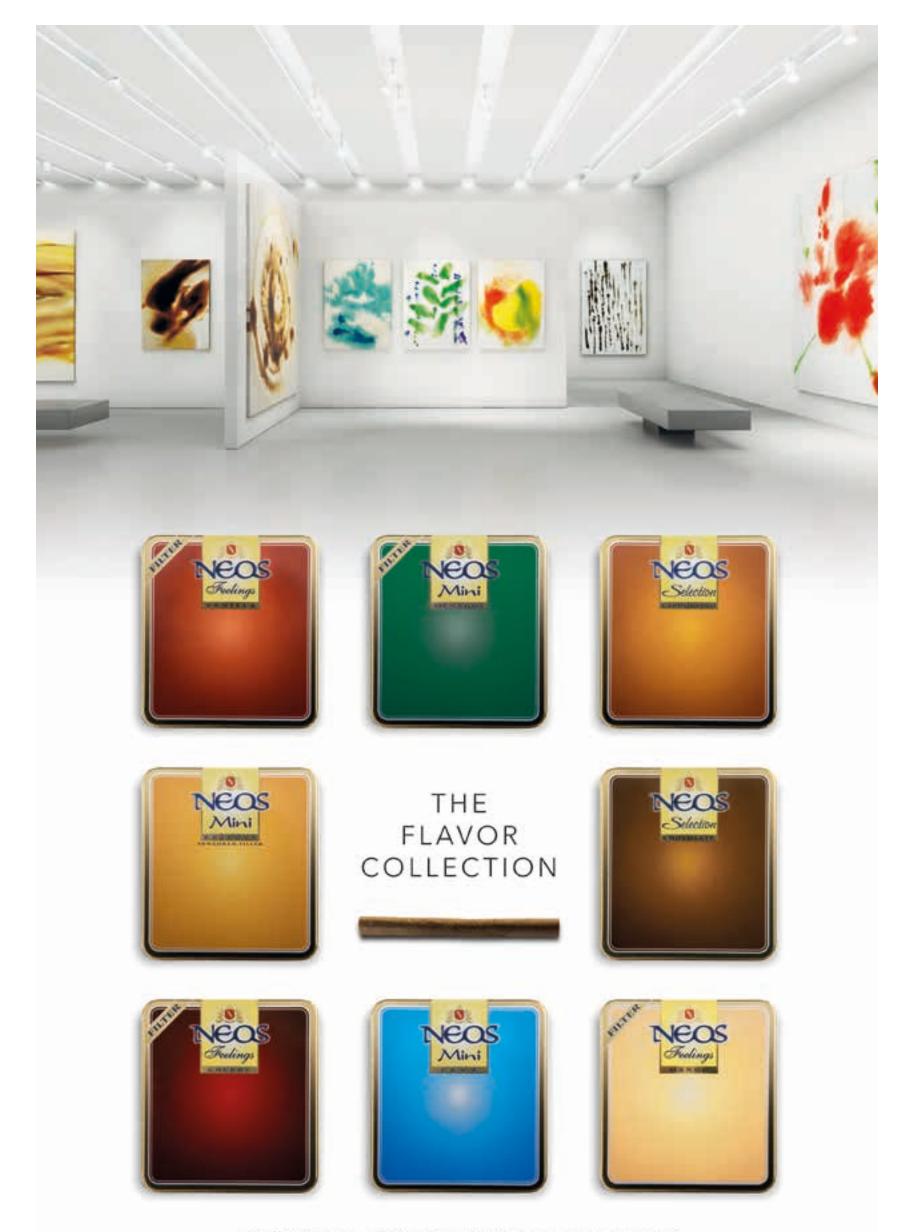
Meanwhile, JTI's Bateson believes more and more consumers are at least considering a move to reduced risk products. "While the majority of demand in duty free shops is still for conventional tobacco products, we consider potential reduced

risk products to be an evolving business. In this sense, we believe conventional tobacco products will continue to coexist alongside potential reduced risk products for some time to come. Global travel retail is an important channel for us and roll-out is led by domestic demand and availability. We are committed to responsibility and sustainability, and we will closely monitor these trends and do what is right for the consumer and the customer."





Rawan Elayyan, Brand Manager, Mazaya: "We are very keen to meet new potential customers in Cannes and look forward to introducing the world of Mazaya shisha to a new audience, as well as our valued existing customers."



Challenges to be met; obstacles to overcome

The tobacco market remains robust in global travel retail, but there are constant challenges and obstacles that must be met and overcome. In Europe, the shadow of Brexit, in particular, looms large over many industries as we enter what may well be the final few months of Britain's membership of the European Union. What, if any, impact could this have on the industry? Or will it present opportunities?

JTI's Bateson suggests that while Brexit will present major challenges for the aviation and maritime sectors, he believes that the duty free & travel retail industry is uniquely placed to benefit. "A return of duty and tax-free sales to travellers moving between the UK and the EU member states is what is called for in this situation," he says. "The return of duty and tax-free sales would, therefore, not only create a critical source of revenue for transport infrastructure, but also the wider national and EU economies."

Due to the fact that the UK is the only significant market in Europe where KT International has no presence – its supplier base and production facilities are in the European Union – from a commercial and supplier base, the brand anticipates very little impact from Brexit bar the broader economic impact that KT International will feel as with any multi-national organisation.

Scandinavian Tobacco Group (Blue Village D10) is highlighting the Don Tomás Clásico Robusto Humi-pack at TFWA World Exhibition & Conference. The Humipack packaging features a proprietary film with transparent foil and special poly-coating. Together these provide an airtight barrier to retain the cigar's optimal moisture level and protect its delicate flavour and aroma over extended periods of time, without the need for a humidor. Scandinavian Tobacco Group is also highlighting Humi-pack packaging for the Macanudo Inspirado.







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JTI's Bateson explains that other pressing issues include the increasing regulatory challenges that the category faces; not that tobacco is alone in facing increased pressure in this regard. "It is our hope that governments recognise the unique character of the duty free & travel retail channel, and protect the channel from disproportionate regulation." he says. "In this context, it is very important to keep and defend the uniqueness of duty free. In order to pre-empt and stop increasing disproportionate legislation, we must continue to initiate constructive engagement with policy-makers and present them with the facts demonstrating the valuable financial contribution made by tobacco to the travel retail industry. The key challenge for our industry is that often regulators do not fully understand the duty free environment and its dynamics. The unintended impact of excessive regulations can be problematic. The industry, including retailers and retailer associations, plays a key role in standing up in defence of the entire business."

Oettinger Davidoff's Young is broadly aligned with this thinking and says that tighter regulations in the US (FDA Deeming Regulations) and the European Union (European Tobacco Products Directive TPD2) require "flexibility, innovative answers and optimised processes within our operational organisation".

And while advertising bans and changes in regulation are challenging for every tobacco brand, such challenges do not, at least, come as a huge surprise. For some players, more significant is the difficulty in showcasing new products in terms of in-store presence. KT International's Buchanan says this is why he values both TFWA World Exhibition & Conference, and TFWA Asia Pacific Exhibition & Conference, as opportunities to put KT International's products front and centre.

What's next?

So, what does the future hold for those brands we caught up with, and what can we look forward to seeing in the exhibition?

KT International is showcasing the latest addition to its range – the Shell Pack Double A Porter. It is aligned to the brand's fashion accessory positioning of the new Corset Shell Pack, and is a double capsule product with Blueberry Blush and Menthol Glaze, giving the consumer a choice of taste.

Bateson says JTI has developed an innovative range of e-cigarette products and tobacco vapour products to match different consumer needs. "Innovation has always been central to what we do; we're dedicated to building the tobacco brands of tomorrow," he explains. "Our reduced risk products put us in a strong position to take on an ever-changing world of customer needs, and the encouraging science behind our new products motivates us to develop the sector further."

Meanwhile, Mazaya's Elayyan says: "We are increasing our business and, in line with that, have expanded our dedicated sales and marketing team, and are now dealing directly with operators rather than through agents or consultants. We are very keen to meet new potential customers in Cannes and look forward to introducing the world of Mazaya shisha to a new audience, as well as our valued existing customers. At the consumer level, we will continue to increase the level of engagement with our consumers as far as possible through engaging and entertaining activations and promotions."

2018 is cause for celebration for Davidoff, as it celebrates the 50th anniversary of its iconic white cigar brand. To commemorate, Davidoff has organised a very special limited edition, which is on show at TFWA World Exhibition & Conference. "The festivities will be accompanied by the launch of the Davidoff Diademas Finas in a beautiful porcelain jar, as well as high-quality accessories including the Zino Z Collection, Davidoff 50 years



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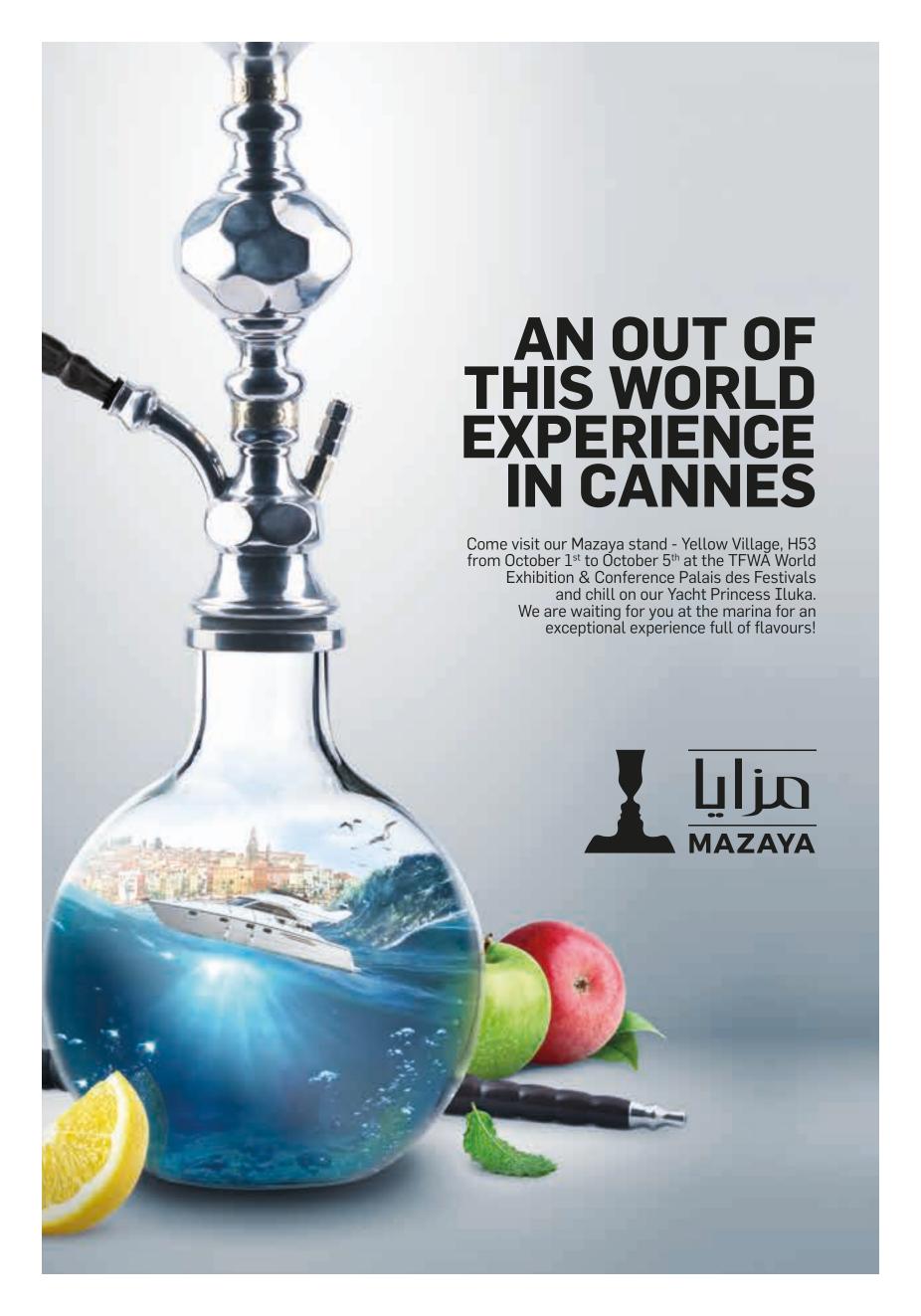
accessories, and the Winston Churchill Travel Humidor limited edition," says Young. "Besides the core brand Davidoff, with its permanent cigar line 702, there will also be some great introductions, such as the new Gifting Collection and the Gran Torpedos in a (56x4) Torpedo format. The end of our anniversary year will be marked with the limited edition Davidoff Year of the Pig celebrating the Chinese New Year, while next year we are looking forward to launching our Winston Churchill Traveller Edition. We feel sure that Sir Winston

would have enjoyed it. He would have filled his late hours beautifully with this exceptional cigar and a glass of his favourite Scotch."

We just wonder: if that famous old leader, bravura statesman and iconic cigar smoker were here today, would he be raising that glass of Scotch in satisfaction or despair, given the huge challenges facing the UK Government in the weeks and months to come. And what impact will it have on the travel retail sector? We can only wait and see.



Learn more about the tobacco innovations being presented at TFWA World Exhibition & Conference by visiting the TFWA Product Showcase (www.tfwaproductshowcase.com). Scan this code to visit the TFWA Product Showcase





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