

TFWA

2019
MEMBERSHIP

BE PART
OF EVERY
JOURNEY





TFWA

BY THE TRADE
FOR THE TRADE



Alain Maingreud President Tax Free World Association

It is a great honour for me to address you, the members of Tax Free World Association, for the first time since my election as the Association's President in December 2018.

It is no easy task to follow such a successful and long-serving President as Erik Juul-Mortensen, but I am determined to work with our Board, Management Committee and permanent staff to build on the strong platform he has helped create for our Association.

Our members will always represent the lifeblood of TFWA. Our mission remains to help create the right conditions for brands to flourish in duty free & travel retail, and I firmly believe that we can and must play a positive role in the continued development of our industry. As I write these words, we are coming to the end of a year that has been broadly positive despite political and

economic uncertainty in many markets. That uncertainty is likely to persist over the year ahead, and issues such as Brexit, currency volatility, trade wars and political change could all affect people's propensity to travel.

In such circumstances, it is more vital than ever that we, the industry's largest trade body, help our members – whatever their size, origin or sector of activity – to reach their full potential in this uniquely challenging market. Our two major trade shows, TFWA World Exhibition & Conference in Cannes and TFWA Asia Pacific Exhibition & Conference in Singapore, will remain the Association's priority. We will always strive to ensure these events retain their relevance and constantly innovate to attract a high-level audience of operators, landlords and other key decision-makers.

We will also continue to invest in TFWA Research, and our growing catalogue of reports on the latest traffic, travel and consumer trends. You will find details of our most recent studies in this brochure and look out for more themed reports on subjects of interest to our industry over the course of 2019. All TFWA Research reports are available to members free of charge and can be downloaded from TFWA.com.

This year sees TFWA return to China for the fourth edition of the TFWA China's Century Conference, organised in partnership with APTRA. The event, to be held in Haitang Bay, Hainan on March 5-7, is certain to bring together the major decision makers in what is arguably our industry's most exciting market.

The MEADFA Conference, held in November and organised by TFWA on behalf of the Middle East & Africa Duty Free Association, is another event not to be missed. TFWA members enjoy discounted rates at both the MEADFA and TFWA China's Century conferences.

We are constantly open to ideas on how to make TFWA membership even more useful and attractive, and we welcome your feedback on all areas of our activity. We hope to provide all our members with the tools you need to fulfil your potential in duty free & travel retail.

Wishing you and your company every success in 2019.

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What is TFWA?

Created in 1984, Tax Free World Association is a not-for-profit organisation incorporated in 1988 under the French law of 1901.

Its members, which now total over 520, are all suppliers of prestige products and brands to the duty free and travel retail industry – one of the most dynamic, sophisticated and challenging retail sectors in the world.



For further information concerning your TFWA membership, please contact:

Sabine Parmentier
TFWA
23-25 rue de Berri
75008 Paris
Tel: +33 (0)1 53 53 48 81
Fax: +33 (0)1 40 74 09 85
Email: s.parmentier@tfwa.com



Sabine Parmentier
Membership
& Administration
Manager

What is TFWA?

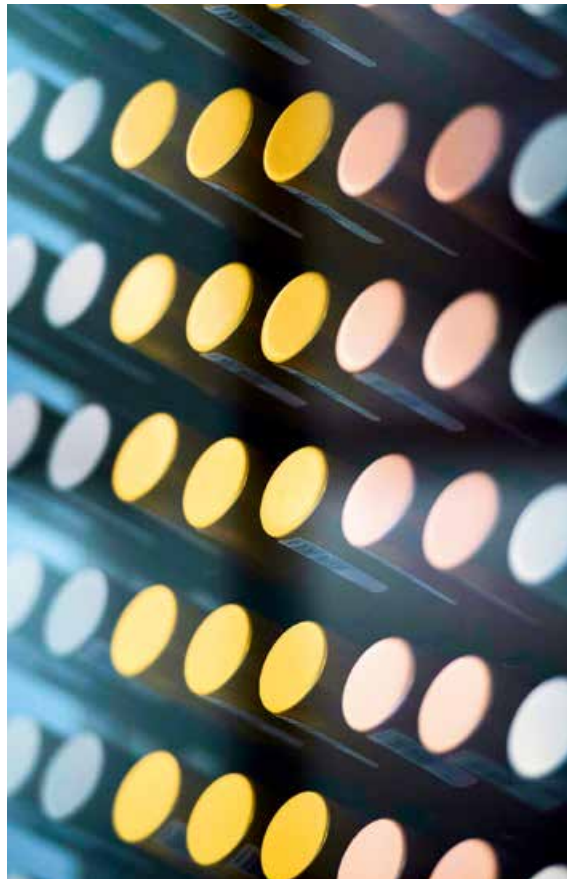
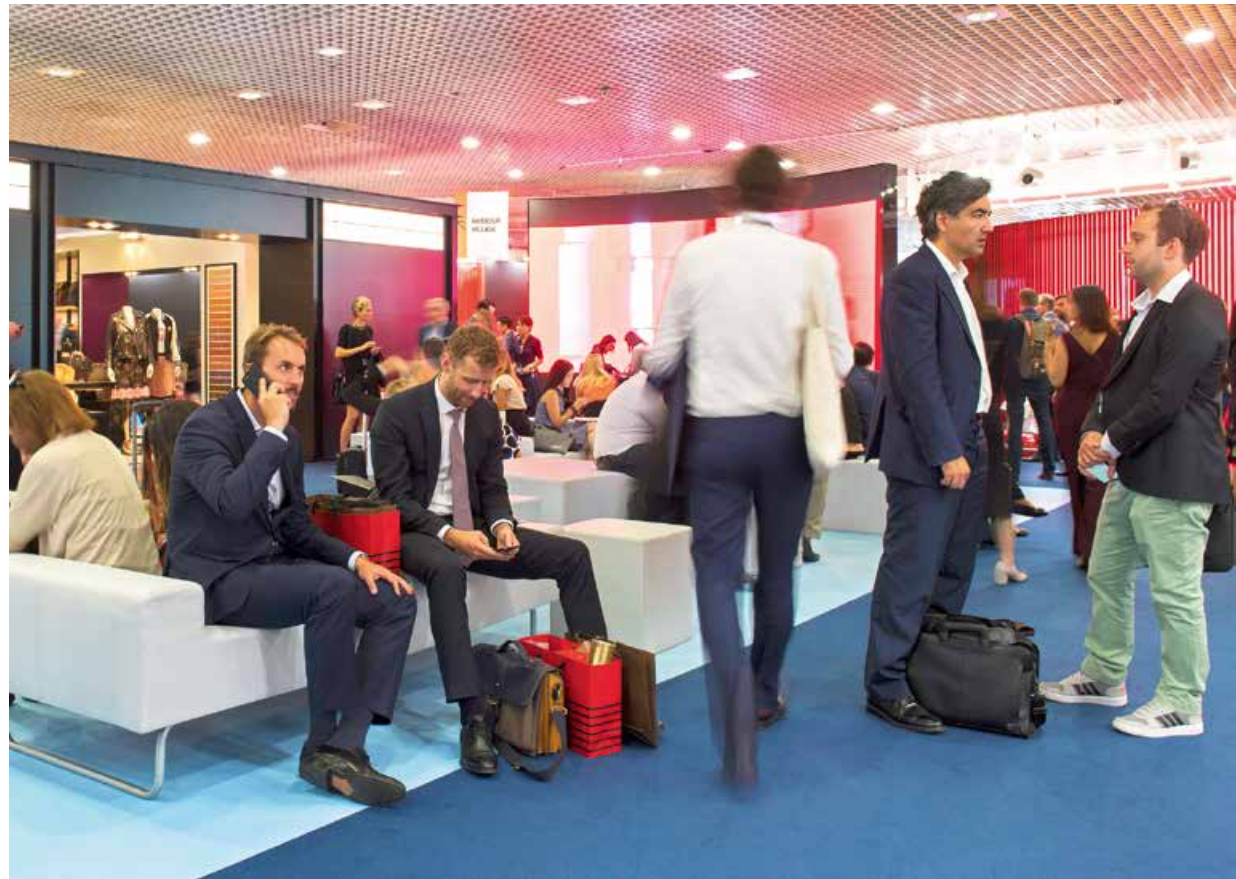
TFWA 2019 Membership

**The world's biggest
duty free & travel retail
association**



What is TFWA?

TFWA 2019 Membership



TFWA's mission is to identify trends and opportunities, build awareness and provide a business platform for the global duty free and travel retail industry to prosper.

Through its organisation of high-quality exhibitions, acclaimed conferences and actionable research studies, TFWA aims to provide a platform for its members to succeed and thrive in the fast-changing market of duty free & travel retail.

The Association plays an important role in representing the interests of its members and of the industry as a whole, helping to forge close relationships between suppliers, retailers and landlords across the world.

Membership of TFWA helps your brand fulfil its potential in duty free and travel retail. Members gain a wide range of benefits for an annual cost of €710 (excluding VAT) for companies outside France and €852 (including VAT) for those based in France.

data



TFWA Research

Knowledge is power

TFWA continues to invest in its research output to provide members with more data, insights and intelligence on our industry and on the travelling consumer.

For over a decade TFWA has sought to provide its members with actionable research studies focused on gaining a better understanding of the travelling consumer and of the context in which the travel industry operates. During that time we have built a diverse research catalogue featuring reports by nationality, theme, product category or location, **all made available to TFWA members free of charge.**

The output provided by TFWA Research to the Association's members is organised into three areas:



TFWA Data

The Association seeks to help improve the quality and frequency of available data, in relation to sales and other KPIs, and to make accurate figures available to members on a regular basis.

TFWA Monitor

Given the volatility of the business environment and the vulnerability of our industry to sudden shocks, TFWA Monitor seeks to help members understand how changes to travel patterns affect duty free & travel retail. It also provides intelligence on the latest retail and consumer trends on domestic markets across the world.

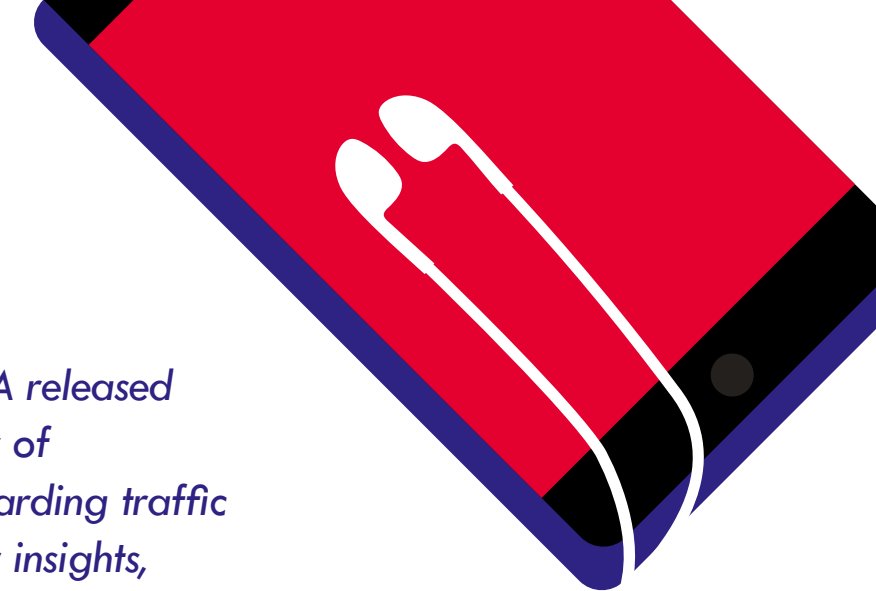
TFWA Insight

Building on the range of studies already provided by TFWA Research, the Insight component includes consumer research reports by theme, sector and nationality, commissioned according to the needs and recommendations of TFWA members.



“In 2018, TFWA released a great diversity of publications regarding traffic trends, consumer insights, travellers’ path-to-purchase, upcoming disruptive forces in our industry and value creation opportunities across the globe that have been very valuable to its members.”

Sophie Neyertz-Ehrsam
L’Oréal Produits de Luxe International



Among planned **TFWA Insight** reports in 2019 will be **Understanding Young China**, an in-depth study of the behaviour of Chinese travellers in the 18-30 age group. Highlights of this report will be presented at the TFWA China’s Century Conference in Hainan on March 5-7.

In 2019, the **TFWA Monitor** series of traffic reports and analyses from travel bookings analyst **ForwardKeys** will be extended, offering in-depth studies of the latest travel trends by region and examining the impact of sudden changes to travel patterns.



Recent TFWA Research studies:

TFWA Insight: The partnership imperative in travel retail

In a constantly changing world, with an increasingly sophisticated and demanding customer base, is travel retail's prevailing concession-led business model still fit for purpose? How might the stakeholders in our industry work more effectively together? And what new initiatives might be made possible by more meaningful collaboration between partners? With this report from TFWA Insight, TFWA and its partner in compiling the report, **Boston Consulting Group**, sought to find some answers to these questions and more. BCG consulted a number of industry companies in preparing the study, which attempts to set the duty free & travel retail industry in its current context, evaluate the existing business model, and make suggestions for improvement.

TFWA 2019 Membership

TFWA Insight: Understanding travellers from the Americas

This study, produced for TFWA by **Horizon Consumer Science**, is a detailed report on travelling consumers in the Americas today, based on over 2,000 interviews with recent travellers from nine key nationalities. It features insights on purchasing habits and spending levels at airports, cruise and border stores, and compares travellers' perceptions of duty free with other available retail during their trip.

TFWA Insight: Inflight Duty & Tax Free Retail Study 2018

TFWA's first in-depth research report on the inflight market, this study was compiled by **Counter Intelligence Retail** and is based on over 3,000 interviews with travellers from 10 key nationalities, both online and on site at three major international airports. The detailed report features qualitative and quantitative data on spending levels, product preferences, browsing and buying levels, plus insights on drivers and barriers to purchase.

TFWA Insight: TRaCS Global Traveller Report 2018

This comprehensive report offers an in-depth view on traveller perceptions and behaviour today, courtesy of the Travel Retail Catalyst Study (TRaCS) biennial survey conducted by **Horizon Consumer Science**. The report is based on interviews with 31,000 travelling consumers from 38 countries, and offers insights into spending levels, motivations and preferences in all key product categories.

TFWA members gain access to the full archive of the Association's research studies, available to download via [TFWA.com](https://www.tfwaworld.com)

The TFWA Handbook

Defining our industry

The third edition of this “industry bible” was published in September 2018, with hard copies sent to all TFWA members free of charge.

The TFWA Handbook was conceived as a practical, readily accessible guide to today’s duty free & travel retail industry for TFWA members. The publication contains definitions, market data, traffic & tourism statistics and practical information, along with comment and analysis from

industry leaders around the world. In addition to hard copies sent to all TFWA members by post, the individual chapters of the TFWA Handbook can also be downloaded from TFWA.com

The TFWA Handbook is published every two years, and the 2014, 2016 and 2018 editions of the TFWA Handbook are available to download from TFWA.com. Our objective is to help members old and new gain a deeper understanding of the scope of the duty free & travel retail industry today.



+ For more information on the TFWA Handbook, please visit TFWA.com or contact Sabine Parmentier (see page 8 for contact details).

The TFWA Handbook

TFWA 2019 Membership

“The TFWA Handbook is an invaluable resource for all members, providing access to insightful industry trends and reports that can really help to drive your business across multiple channels and geographies”.

Nick Mogford
Brown-Forman



“The TFWA Member’s Newsletter has proven to be an essential tool for stakeholders to stay connected and informed of the latest industry and Association news. This is especially important in our channel where significant developments are happening all the time and we need to be kept up to date regarding new opportunities, challenges and trends”.

James Young
Oettinger Davidoff



TFWA Members' Newsletter

Keeping members informed of industry events, trends and challenges

The TFWA Members' Newsletter is a quarterly update for members containing exclusive data, features, research and event news. Sent by email, the newsletter is designed to keep members informed on market trends and on the day-to-day work of the Association on their behalf.

Content includes:

- The latest industry data from Generation, including trends by product category and by region
- Previews and summaries of the latest reports and figures from TFWA Research
- Member profiles & interviews
- Industry association news
- Event news and reviews

+ If you are not currently receiving the Members' Newsletter and would like to do so, please contact Sabine Parmentier (see page 8 for contact details).

events



On-site benefits at TFWA events

**Members attending
TFWA World Exhibition
& Conference in Cannes
can enjoy a number of
exclusive on-site benefits.**



TFWA Lounge

The TFWA Lounge, located on level 3 of the Palais des Festivals in Cannes, is a dedicated space where TFWA members can conduct business in comfort and benefit from an extensive range of services:

- Internet access
- Charging station
- Private bar and lounge area with complimentary drinks and snacks
- Meeting area (booking required)
- International press
- Massage service
- Dedicated concierge service
 - Reservations for restaurants and trips
 - Local tourism information
 - Catering for private events
 - Car rental, travel service, taxi booking
 - Car hire
 - Private jet transport
 - Babysitters
 - Boat hire
 - Travel ticket modifications
 - Gift and flower delivery
 - Errand running & problem solving



“‘Relax, recharge, communicate’ – this is how I would describe the TFWA Lounge. It’s the oasis at the TFWA exhibition where you can enjoy a minute of silence, do that very important face-to-face meeting, have a coffee and recharge your batteries – and those of your mobile phones.”

Sam Gerber
WorldConnect





The Scene

TFWA members benefit from a **10% discount** on your pre-registered weekly entrance ticket at The Scene, the after-hours hotspot offering music and dancing, a lively bar and fabulous terrace with views of the Cannes harbour.

On-site benefits at TFWA events



TFWA 2019 Membership

Professional photos & video film

Benefit from a **20% discount** to promote your presence at TFWA World Exhibition & Conference, to keep a record of your stand or film interviews of your VIP guests in Cannes.



Contact Denis Chaloyard at cmaprod@free.fr for video films or Nathalie Oundjian at mail@nathalie-oundjian.com for the photo service.

Recruitment service

Find quality candidates through our recruitment partner **BeThe1**, located in the Mediterranean Village, level 0 (see also page 36).



Please contact **François Bouyer**, tel: +33 6 12 38 80 61 or contact@BeThe1.com

Other on-site benefits at TFWA events

Members are encouraged to attend the **Annual General Meeting** during TFWA World Exhibition & Conference, where they have the right to vote on various issues relating to the management of the Association. Access to the exhibition on Thursday is complimentary for members wishing to attend the AGM.

TFWA members are also entitled to:

- One additional invitation for the Welcome Cocktail during TFWA Asia Pacific Exhibition & Conference.
- Special "Member" mention in official event publications.

On-site benefits at TFWA events

TFWA 2019 Membership



TFWA approved partners



BeThe1

Find the best candidates in the duty free & travel retail industry

TFWA members benefit from a preferential discount with BeThe1, a leading international recruitment firm specialised in fashion, beauty, retail and travel retail.

With a team of 18 experts based in Paris, New York, Shanghai, Singapore and Tokyo, **BeThe1 provides high quality recruitment services** to 300 key employers with 15 searching missions per month.

BeThe1 operates the websites **www.BeThe1.com** and **www.TravelRetailJobs.com**, pooling 160,000 fully registered professionals including 16,000 in duty free & travel retail alone.

The service covers all middle manager and senior executive positions within supplier and retailer organisations, in departments including retail, account management, sales, sales support, marketing, merchandising, procurement and back-office.

BeThe1 offers:

- **A new generation international recruitment service with specialising in duty free & travel retail**
- **High quality recruitment offering efficient and competitive service, a high success rate and industry leading retention rate of placed candidates**

BeThe1

+ Find out more at **BeThe1.com**

+ TFWA works with a number of approved business partners who are pleased to offer their services to TFWA members at a discounted rate.



TFWA approved partners

Wordessence

Clear, concise copy created to meet your exact needs

Providing targeted business writing services to help organisations maximise the efficiency of their written and spoken communications, Wordessence has extensive experience in travel retail. Our clients include some of the industry's leading players. TFWA members can now enjoy a preferential rate for the first assignment.

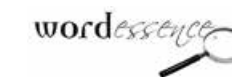
The fragmentation of traditional media and the growth of online and mobile channels have transformed the way people communicate. To cut through, messages must be clear, concise and compelling.

+ For more information, please contact James Clarke: **info@wordessence.co.uk**
www.wordessence.co.uk

Wordessence creates copy for a wide range of purposes, including:

- **Brochures and packaging**
- **Websites**
- **Newsletters and presentations**
- **Press releases**
- **Thought leadership papers and ghosted articles**
- **Speeches and scripts**
- **Shareholder communication**

Working in English and French, we cover most product categories and write for both trade and consumer audiences.



M1nd-set

M1nd-set is a Swiss-based marketing intelligence agency specialized in travel research, and has provided travel retail & duty free research and consulting to suppliers, retailers and industry associations on all continents for 10 years. Its main areas of research are Consumer Insights, Shopper Segmentations, Attitudes & Behaviour, Price Research and more, at airports, ferries and border shops around the world.

m1nd-set's Business Intelligence Service "BIS" provides an interactive and multi-dimensional approach to three key information sources. The first is behavioural data, which is based on over 21,000 annual face-to-face interviews at over 60 airports around the world. The second module provides comprehensive air traffic and forecast data (including direct bookings from

airlines) for 1,500 airports and all nationalities in the world. The third pillar is a macro and socio-economic data module, providing regional and national specific context both for the present and future. Subscribers have access to the data 24/7 allowing interactive analysis within and between the different information sources.

TFWA members are entitled to a 10% discount on subscriptions to m1nd-set's BIS service.



To find out more, please contact m1nd-set on:
Tel: +41 21 925 50 25
Email: info@m1nd-set.com
www.m1nd-set.com

ForwardKeys

Helping to convert travellers into shoppers.

ForwardKeys helps companies to improve their tactical decision making, supporting the data-driven process for all traveller-focused companies.

ForwardKeys is used to monitor and anticipate international travel patterns from a global perspective down to departures, transits & arrivals at any airport terminal, for any nationality, at any given time, by crunching and analysing over 17 million booking transactions a day.

In travel retail, ForwardKeys enables brands & retailers to better understand the corridors travellers are using to reach their destinations, manage upcoming traffic flows, anticipate the impact of events and improve

the ROI of marketing, promotion & communication efforts by anticipating future market trends.

The services provided by ForwardKeys include subscription to its online BI platform, monthly standard reports, ad hoc analysis and topic or customer specific webinars.

ForwardKeys is pleased to offer TFWA members a 10% discount on ad hoc research & analysis and a 50% discount on the "China Outbound" webinars.



For more information, please contact ForwardKeys on:
Tel: +34 962 063 973
or +33 6 61 66 24 71
Email: info@forwardkeys.com
www.ForwardKeys.com

NPD Travel Retail

NPD Travel Retail (formerly Counter Intelligence Retail) is one of travel retail's leading commercial development specialists. The company has expertise in global consumer, shopper and market insight and works with brands and retailers to provide the most up-to-date industry data. Additionally, NPD Travel Retail's online information hub provides clients with the latest information on global passenger traffic trends and nationality statistics as well as essential retail data points.

Preferential rates are available for TFWA members.



For more details on the products & services offered, please contact NPD Travel Retail on:
Tel: +44 1904 727 030
Email: contactnpd@npd.com
www.npd.com

other services



TFWA App

The new TFWA App is a powerful, interactive tool designed to optimise delegates' experience at TFWA's events, delivering all the information you need to participate, network and more. The App enables you to plan your event, find your way on-site, connect and meet with your business partners, interact with conference speakers and be part of the TFWA community all year round.

TFWA members and their business partners can download the TFWA App from the Apple and Google Play stores now.



TFWA.com

The dedicated Association website, TFWA.com, was recently refreshed with the addition of a number of new sections and resources. Many of these are accessible to TFWA members only, with login details sent to each member separately.

Among resources available exclusively to TFWA members on TFWA.com are the following:

- Members news and interviews
- TFWA Research studies, dating back to 2004
- The full detailed Members' Database, including contact details for all TFWA members
- The TFWA Handbook, downloadable in PDF format
- TFWA Annual Report
- Statutes and Rules & Regulations of TFWA



Trade press discounts

Membership of TFWA brings you a discount of up to 15% on subscription fees for the following publications:

- Duty Free News International / Frontier
- Drinks International
- The Americas Duty Free and Travel Retailing
- Gulf-Africa Duty Free and Travel Retailing
- Asia Duty Free and Travel Retailing
- The Spirits Business*
- The Drinks Business*

* discount of up to 30% for TFWA Members.

TFWA's Paris office at your disposal

If you are a member of TFWA and are travelling through Paris, TFWA will be delighted to welcome you to our headquarters if you are looking for a quiet place to work with free wifi.

Please contact us 48 hours in advance of your visit to check office space availability and we will send confirmation by email.

the team





TFWA Board



Alain Maingreud
TFWA President



Frédéric Garcia-Pelayo
TFWA Vice President Finance



Donatienne de Fontaines-Guillaume
TFWA Vice President Commercial



Patrick Bouchard
TFWA Vice President
Conferences & Research



Priscilla Beaulieu
TFWA Vice President
Corporate



Nadia Skouri
TFWA Vice President
Marketing

TFWA Management Committee

Jewellery & Watches



Nadia Skouri
Buying The Sky



Stuart McGuire
Scorpio Worldwide



Cécile Naour
Cartier



Claudia Heslier Schioenning
Swarovski



Thom Rankin
Capi Global BV



Jean-Pierre Bombet
Spa Developpement / Be Relax



Sam Gerber
WorldConnect

Fashion & Accessories



Giulia Agnoli
Furla



Romina Cortegiani
Bally



Emanuele Mazziotta
Coccinelle



Silvia Santin
MCM



Francis Gros
Ermenegildo Zegna



Alessandro Pozzi
Luxottica

Wine & Spirits



Donatienne de Fontaines-Guillaume
Moët Hennessy



Philippe de Marcilly
Albert Bichot



Nick Mogford
Brown-Forman



David Hughes
Bacardi-Martini



Damien Bertrand
Maison Boinaud



Pier Giuseppe Torresani
Masi Agricola



Franc Kopatin
Stock Spirits Group



Rajiv Bhatia
William Grant & Sons

TFWA Management Committee

Tobacco



James Young
Oettinger Davidoff



Rami Maktabi
Philip Morris World Trade



Tobias Baude
Imperial Brands



Gemma Bateson
JT International

Confectionery & Fine Foods



Patrick Dorais
Al Nassma Chocolates



Steven Candries
Guylian



Jaya Singh
*Mondelez World
Travel Retail*



Eric Carlier
Valrhona

Fragrances & Cosmetics



**Frédéric
Garcia-Pelayo**
Interparfums



Patrick Bouchard
Estée Lauder



Priscilla Beaulieu
*Kaloo, Clayeux
Kokeshi by
Millennium Fragrances*



**Jean-Guillaume
Trouvin**
Chanel



Christian Laurent
Clarins



Simona Sangalli
Collistar



Olivier Dubos
Parfums Christian Dior



Txema Marquiegui
Coty



Arnaud de Volontat
Altimetre



**Sophie
Neyertz-Ehrsam**
*L'Oréal Produits
de Luxe International*



Antoine Lafourcade
Puig

TFWA Staff

Executive Office



John Rimmer
Managing Director



Emilie Vin
PA to President &
Managing Director

Exhibitions



Myriem Chalabi
Exhibitions Director



Françoise Parigi
Exhibitions
& Logistics
Manager



Isabelle Régnier
Advertising
& Sponsorship
Manager



Mona Lebrasseur
Sales Supervisor



Morgane Sekfali
Commercial
Assistant

TFWA Staff

TFWA 2019 Membership

Conference, Research & Corporate



Michele Miranda
Conference Manager



Maha Abdennbi
Corporate
Relations Manager



Sabine Parmentier
Membership
& Administration
Manager

Marketing



Cécile Lamotte
Marketing Director



Maud Bruneau
Communication
Manager



Victor Legrosdidier
Marketing Coordinator

TFWA Staff

IT



Ana Homawoo
IT & Technical
Director



Christian Huynh
IT Systems
Co-ordinator



Shakil Sobhun
IT Systems
Co-ordinator

Finance & Human Resources



Sylvie Guigue
Finance & Human
Resources Director



Carole Berrebi
Accountant

23-25 rue de Berri – 75008 Paris – France

