

**TFWA**

**MEMBERSHIP**

**2021**

**A NEW START**



**Jaya Singh**

President,  
Tax Free World  
Association

# FROM THE PRESIDENT

**It is a great pleasure and an honour for me to address you, the members of Tax Free World Association, in my new role as President of the Association. I thank the members of the TFWA Management Committee for placing their trust in me, and I look forward very much to working with them and with my colleagues on the TFWA Board as we strive to assist the duty free & travel retail industry in its recovery from the most challenging year in its history.**

There is little point dwelling on what our Association and member companies lived through in 2020. The damage done to our industry is clear enough. As I write these words, the covid-19 virus continues to spread at worrying speed, yet the arrival of several effective vaccines provides hope that the pandemic will be brought under control this year, and that international travel can resume safely.

We at TFWA can and must play a central role in the recovery of the duty free & travel retail industry. We are aware that, at best, 2021 will be a year of transition, during which budgets will be constrained and the opportunities for business travel restricted. Amid this context, we will adapt our events and services in order to fulfil our mission, namely to provide a platform for our industry to prosper and develop.

In late 2020 the TFWA Management Committee decided to relocate our 2021 Asia event, which will now take place in the undoubted hotspot of the global industry, Hainan in China. The TFWA Asia Pacific Hainan Special Edition is designed to facilitate face-to-face and virtual meetings between brands and buyers in a cost-effective way using hotel suites, without the need for major investments in stands. Until it is possible to resume large-scale events in our industry, we believe that this format is more in tune with our members' and partners' needs.

That said, we will continue to prepare for TFWA World Exhibition & Conference in Cannes in the expectation that trading and travel conditions in the second part of 2021 will be more favourable. It goes without saying that we will monitor the health and travel situation very closely over the months ahead, but we remain optimistic that our Cannes event will provide a much-needed and long-awaited opportunity for the global industry to gather once more.

Our TFWA Research programme, available exclusively and free of charge to TFWA members, is a vital part of the service we offer. We will continue to add to our research catalogue, with new reports on markets and nationalities of particular interest to our industry, along with analysis of the latest travel trends and available market data.

Look out also for the fourth edition of the TFWA Handbook, which will be published a little later than scheduled, in the first quarter of 2021. This online "industry bible" is designed to give an understanding of the size and scope of our industry, and is exclusively available to TFWA members, free of charge.

We are also looking forward to the return of the MEADFA Conference, scheduled for November and organised by TFWA on behalf of the Middle East & Africa Duty Free Association. Members enjoy discounted rates at this event; full details will be available in the run-up to the conference.

As our Association emerges from a very difficult year, I would like to say a sincere "thank you" to all our member companies. Your support has helped to ensure we are still in a position to serve our industry in 2021 and beyond. With the help of the TFWA Board, Management Committee and team, I am determined to repay that support by helping get our market back into growth.

I wish you, your colleagues and business partners every happiness and success over the year ahead.

**“I would like to say a sincere “thank you” to all our member companies.”**

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# 01

## 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 total close to 500, 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  
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75008 Paris  
Tel : +33 (0)1 53 53 48 81  
Email: [s.parmentier@tfwa.com](mailto:s.parmentier@tfwa.com)



**Sabine Parmentier**  
Membership  
& Administration  
Manager





**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.



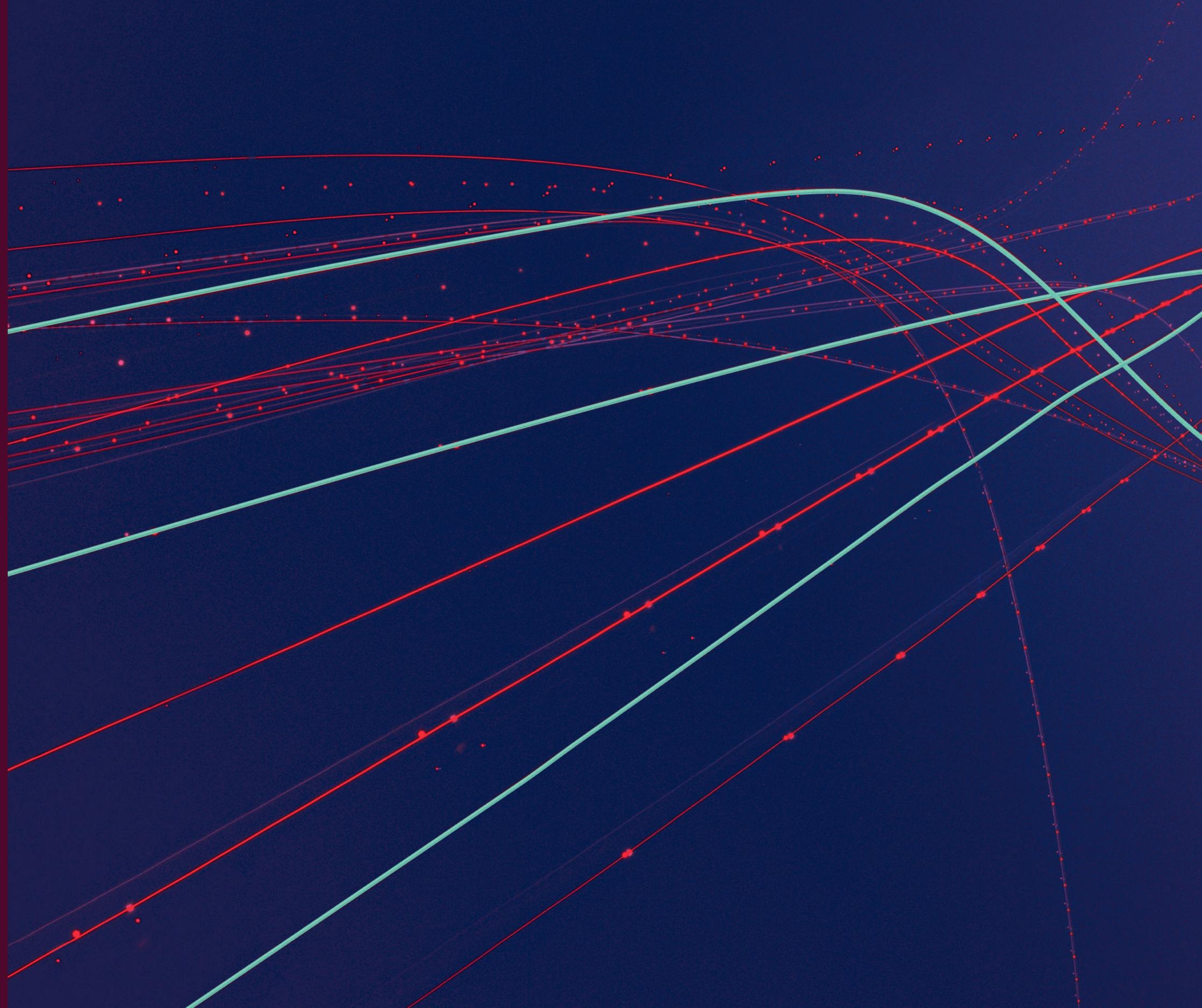
# 02

## DATA

### TFWA Research

**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 nearly twenty years 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 against 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.



**TFWA members gain access to the full archive of the Association's research studies, available to download via TFWA.com. Among the reports made available to TFWA members last year are:**

### **TFWA Monitor: Travel trends around the world**

Compiled by travel analyst ForwardKeys, the TFWA Monitor series of travel trend reports looks in detail at what travel bookings tell us about who is travelling where – now and in the future.

### **TFWA Insight: Sustainability in Travel Retail 2020**

For this study, TFWA was keen to explore the importance of sustainability for travelling consumers today, and also to canvas the thoughts of industry stakeholders with regard to the benefits and challenges to creating a viable and meaningful sustainability strategy. The result is the TFWA Insight: Sustainability in Travel Retail Study 2020, an in-depth report conducted and compiled by Pi Insight, featuring extensive insights and data from consumers, brands, retailers, airports and other companies.

### **TFWA Insight: TRaCS Category Reports**

This series of six studies, conducted by Horizon Consumer Science, looks in detail at specific issues of interest to each of the major product categories in duty free & travel retail: confectionery, liquor & wines, beauty, fashion & accessories, jewellery & watches, and tobacco.



# The TFWA Handbook

## Defining our industry

The fourth edition of this “industry bible” will be published online on TFWA.com in the first quarter of 2021.

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.

The TFWA Handbook is published every two years, and the 2014, 2016 and 2018 editions 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](http://TFWA.com) or contact Sabine Parmentier ([click here for contact details](#)).



WHAT IS TFWA?  
THE FOUNDATION AND MISSION OF TFWA

## THE FOUNDATION AND MISSION OF TFWA

TFWA is an association of brands, whose 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.

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 1500, are the 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.

The origins of TFWA lie in the decision by a group of like-minded brand-owners to form a new trade association to run the industry's own annual exhibition. The International Tax Free Trade Symposium, established in 1973, had grown steadily in size and importance over the subsequent decade, but many exhibitors and visitors were concerned by a number of factors including the rising cost of participation, the quality of service provided and the organisers' limited appetite to respond to these concerns. Their grievances led to the formation of TFWA and to the launch of what was then known as the Tax Free World Exhibition, run on a not-for-profit basis by the brands themselves. First held in Nice in 1985, the event moved to Cannes the following year and has gone from strength to strength ever since. The TFWA World Exhibition & Conference is now the undisputed global summit of the duty free & travel retail industry.

A decade after its foundation TFWA launched its second major event, the TFWA Asia Pacific Exhibition & Conference, in response to the importance of the Asian duty free market to its members. Over twenty years on, this event, held in Singapore, brings together a growing number of brands, airports and operators with an interest in this dynamic region.

TFWA is an association of brands, whose 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.

Within this context the Association aims to encourage close relationships between suppliers and operators worldwide, to play a part in representing the interests of its members and the industry as a whole and, in particular, to provide business support for the industry through appropriate products, services and a forum for continued dialogue and development.

Outreach to other trade bodies is a vital part of TFWA's mission. The Association has been instrumental in the founding of regional associations across the world, including the Asia Pacific Travel Retail Association and the Middle East & Africa Duty Free Association, just as it provides administrative services to the European Travel Retail Confederation. TFWA is represented on the Board of all three associations.

TFWA continues to play an important role in representing the industry's interests,

and it was with this in mind that the Association played a central role in the establishment of the Duty Free World Council, a global body designed to support and strengthen the crucial work undertaken by the various national and regional associations. TFWA is a founder member of the DFWC, whose headquarters are housed at the TFWA offices in Paris.

The not-for-profit ethic of the Association determines its financial policy and is designed to guarantee the

highest level of quality and service at optimum cost.

Today, TFWA is the leading provider of exhibitions, conferences and services to the duty free industry. Its motto chosen by the brands back in 1984 – by the way, still relevant today as it

# TFWA Members' Newsletter

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 ([click here for contact details](#)).

# TR Toolbox

TFWA has joined forces with Contineo Labs/ Generation Research to help create a new resource designed to help users understand the scope of commercial activities at the world's leading E-commerce platforms and airports.

The TR Toolbox, accessible online, offers a series of tools designed to give travel retail stakeholders enhanced information on the industry.

It currently features a search engine linked to all the major titles in the trade press, allowing users to search thousands of articles by company, sales channel, region and any other relevant criterion.

The Toolbox also hosts the TR Wiki, functioning in a similar way to Wikipedia and being constantly updated and enriched using feedback and information from users and associations. In 2021, given the new dynamics of the industry, the focus of the Wiki will be to better understand the E-commerce ecosystem by listing all major E-commerce platforms, their operators, the categories and brands being sold and much more. This information will be available to the users in the form of a monthly E-commerce Pulse report available online.

In parallel, a Point of Sales repository is being built in the TR Wiki, aiming at providing users with a dynamic resource that shows who operates what, and where in the industry. The effort starts with the top 100 airports by international traffic but will gradually increase its scope and details.



TFWA's support is allowing its members to access all the features of the TR Toolbox free of charge. Any member wishing to access the resource can log on to [www.tr-toolbox.com](http://www.tr-toolbox.com) to sign up.





# 03

## 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 without chauffeur
  - Private jet transport
  - Babysitters
  - Boat hire
  - Travel ticket modifications
  - Gift and flower delivery
  - Errand running & problem solving



## 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.



## OTHER SERVICES

### Video film service

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](mailto:cmaprod@free.fr).

### Recruitment service

Find quality candidates through our recruitment partner **BeThe1**, located in the Palais des Festivals.

Please contact **François Bouyer**,  
Tel: +33 6 12 38 80 61  
or [contact@BeThe1.com](mailto:contact@BeThe1.com).  
(read also the **BeThe1** section)

### 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.
- Special "Member" mention in official event publications





# 04

## **TFWA APPROVED PARTNERS**

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



# BeThe1

Find the best candidates in the duty free & travel retail industry with BeThe1, a leading international recruitment consulting boutique specialised in fashion, beauty, retail and travel retail for 20 years.

With a team of 11 experts based in Paris, Hong Kong, Shanghai and Singapore, BeThe1 provides high quality recruitment services to 300 key employers with 10 searching missions per month.

BeThe1 operates the websites [www.BeThe1.com](http://www.BeThe1.com) and [www.TravelRetailJobs.com](http://www.TravelRetailJobs.com), pooling 170,000 fully registered professionals including 17,000 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 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](http://BeThe1.com).

# Wordessence

Clear, concise copy tailored to your needs.

Providing targeted business writing services to help organisations get the most from 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.

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

- Brochures and packaging
- Websites
- Newsletters and presentations
- Brand guidelines
- Thought leadership papers and feature articles
- Speeches and scripts
- Shareholder communication

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



For more information, please contact James Clarke:  
[info@wordessence.co.uk](mailto:info@wordessence.co.uk)  
[www.wordessence.co.uk](http://www.wordessence.co.uk)





## M1nd-set

**m1nd-set is a Swiss-based marketing intelligence agency specialized and leading in travel research, and has provided travel retail & duty free research and consulting to suppliers, retailers and industry associations on all continents for 13 years.**

Its main areas of research are Consumer Insights, Touch Points Analysis, Shopper Segmentations, Attitudes & Behaviour, Price & Conjoint Research and more, at airports, cruises & ferries, downtown duty free and border shops around the world.

m1nd-set's Business Intelligence Service "B1S" provides an interactive and multi-dimensional approach to two key information sources.

The first is behavioral data for all categories, based on over 100,000 face to face interviews at over 60 airports around the world. It was launched in 2016 and allows users to analyze trends over time.

The second module provides comprehensive air traffic and forecast data (the only source including direct ticket sales from nearly 500 airlines and also airline data) for 1,500 airports and all nationalities in the world. Subscribers have access to the data 24/7, allowing interactive analysis within and between the different information sources.

**TFWA members benefit from a 10% discount on subscriptions to m1nd-set's B1S service.**



**To find out more, please contact m1nd-set on:**  
Tel: +41 21 925 50 25  
Email: [info@m1nd-set.com](mailto:info@m1nd-set.com)  
Web: [www.m1nd-set.com](http://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 business intelligence 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 30% 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](mailto:info@forwardkeys.com)  
[www.ForwardKeys.com](http://www.ForwardKeys.com)

# Contineo Labs/Generation Research

**Contineo Labs designs data-driven solutions tailored to the travel retail industry, while its subsidiary Generation Research helps travel retail clients benchmark against their peers.**

Contineo Labs helps companies unlock the full potential of their sources of insight so that they can focus on informed decision making.

With a large team of data scientists and business intelligence experts, they support their clients through all stages of insights management, from data consolidation to data mining and visualisation.

Services include e-commerce analysis and price monitoring, sales data consolidation and shop trends analyses.

Contineo Labs also operates the TR Toolbox along with a series of other tools operated by its company Generation Research, helping travel retail clients keep track of industry trends and benchmark against their peers.

Generation's various information sources are enriched with extensive market research and integrated with insights from their panels into a comprehensive database of market and category trends available widely to all industry players.

**TFWA Members can access the TR Toolbox free of charge, and get free access to Generation Research data via TFWA publications and presentations.**



# 05

**OTHER  
SERVICES**



TFWA

APP

IN  
YOUR  
POCKET

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.

Download the TFWA App now



Flash me



## TFWA App

The 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
- 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.



# 06

THE TEAM

## TFWA Board



**Jaya Singh**  
TFWA President



**Frédéric Garcia-Pelayo**  
TFWA Vice President  
Finance



**Donatienne de Fontaines-Guillaume**  
TFWA Vice President  
Commercial



**Gemma Bateson**  
TFWA Vice-President  
Conferences & Research



**Sam Gerber**  
TFWA Vice President  
Corporate



**Aude Bourdier**  
TFWA Vice President  
Marketing



# TFWA Management Committee

## Perfumes / Cosmetics



**Frédéric Garcia-Pelayo**  
Interparfums



**Patrick Bouchard**  
Estée Lauder  
Companies



**Hervé Ducros**  
Chanel



**Flaka Hamiti**  
Clarins



**Priscilla Beaulieu**  
Angel Cosmetics



**Nicolas Rimeau**  
Laboratoires Filorga  
Cosmétiques



**Neil Ebbutt**  
Rituals



**Arnaud de Volontat**  
Altimetre



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

## Fashion / Accessories / Sunglasses / Luggage



**Marco Gadola**  
Furla



**Tommaso Beretta**  
Bally



**Giorgio Lepratto**  
Coccinelle



**Erin Lillis**  
Lacoste



**Francis Gros**  
Ermenegildo Zegna



**Alessandro Pozzi**  
Luxottica

# TFWA Management Committee

## Wine / Spirits / Non alcoholic beverages



**Donatienne de Fontaines-Guillaume**  
Moët Hennessy



**Philippe de Marcilly**  
Albert Bichot



**Aude Bourdier**  
Brown-Forman



**Violaine Creuzé**  
Gonzalez Byass



**Barry Geoghegan**  
Duty Free Global



**Pier Giuseppe Torresani**  
Masi Agricola



**Oliver Storrie**  
Quintessential Brands Group



**Mauro Piliu**  
Stock International

## Confectionery / Fine Foods / Food supplements



**Jaya Singh**  
Mondelez World Travel Retail



**Patrick Dorais**  
Al Nassma Chocolates



**William Legallais**  
Leonidas



**Eric Carlier**  
Saveurs et Nature



**James Young**  
Oettinger Davidoff



**Andrey Lysenko**  
Philip Morris World Trade



**Tobias Baude**  
Imperial Brands



**Gemma Bateson**  
JT International

## Tobacco / Smokers' accessories

## TFWA Management Committee

### Jewellery / Watches / Writing instruments



**Nadia Skouri**  
Buying The Sky



**Alessandra Visconti**  
Reflecta

### Electronics / Travel accessories



**Jean-Pierre Bombet**  
Spa Developpement /  
Be Relax



**Sam Gerber**  
WorldConnect

## TFWA Staff

### Executive Office



**John Rimmer**  
Managing Director



**Emilie Vin**  
PA to President  
& Managing Director

### Marketing



**Cécile Lamotte**  
Marketing  
Director



**Maud Bruneau**  
Communication  
Manager



**Céline Fossé**  
Customer  
Relationship Manager

# TFWA Staff

## Finance & Human Resources



**Sylvie Guigue**  
Finance & Human  
Resources Director



**Carole Berrebi**  
Accountant

## Exhibitions



**Myriem Chalabi**  
Exhibitions  
Director



**Françoise Parigi**  
Exhibitions  
& Logistics Manager



**Isabelle Régnier**  
Advertising  
& Sponsorship  
Manager



**Mona Lebrasseur**  
Sales Supervisor



**Morgane Sekfali**  
Commercial  
Assistant

## Conference, Research & Corporate



**Michele Miranda**  
Conference  
Manager



**Maha Abdenni**  
Corporate  
Relations Manager



**Sabine Parmentier**  
Membership  
& Administration  
Manager

## IT



**Ana Homawoo**  
IT & Technical Director



**Christian Huynh**  
IT Systems  
Co-ordinator



**Shakil Sobhun**  
IT Systems  
Co-ordinator



**Nelly Seenarain**  
Helpdesk Assistant



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