

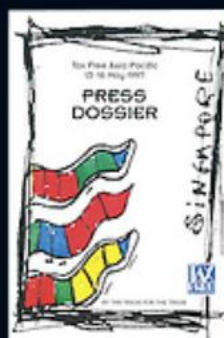
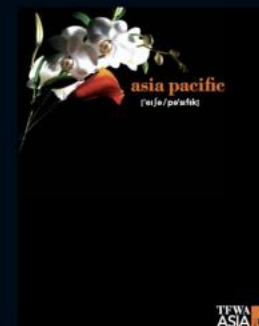
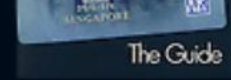
The logo for TFWA, consisting of the letters 'TFWA' in a bold, serif font.

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EXHIBITION &
CONFERENCE**

**THE DUTY FREE
& TRAVEL RETAIL
ASIA PACIFIC SUMMIT**

10-14 MAY 2026 - SINGAPORE





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2026 TFWA APEC

Visitor breakdown by country

Region

Americas

Asia and Australasia

Europe and Eurasia

Middle East and Africa

2025F

1.9%

4.1%

1.4%

3.1%

2026F

1.9%

3.5%

1.0%

3.7%

2027F

2.4%

3.7%

1.6%

3.7%

2025-2027%

2.1%

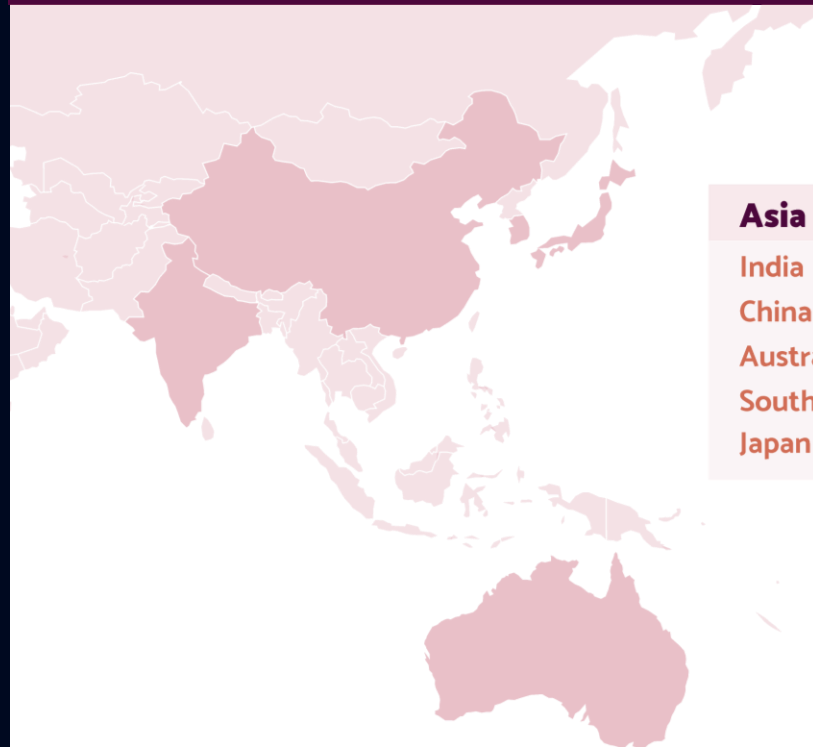
3.7%

1.3%

3.5%

Forecasted average annual growth

Source: Kearney, Global Economic Outlook 2025-2027, October 2025



Asia and Australasia

India 6.6%

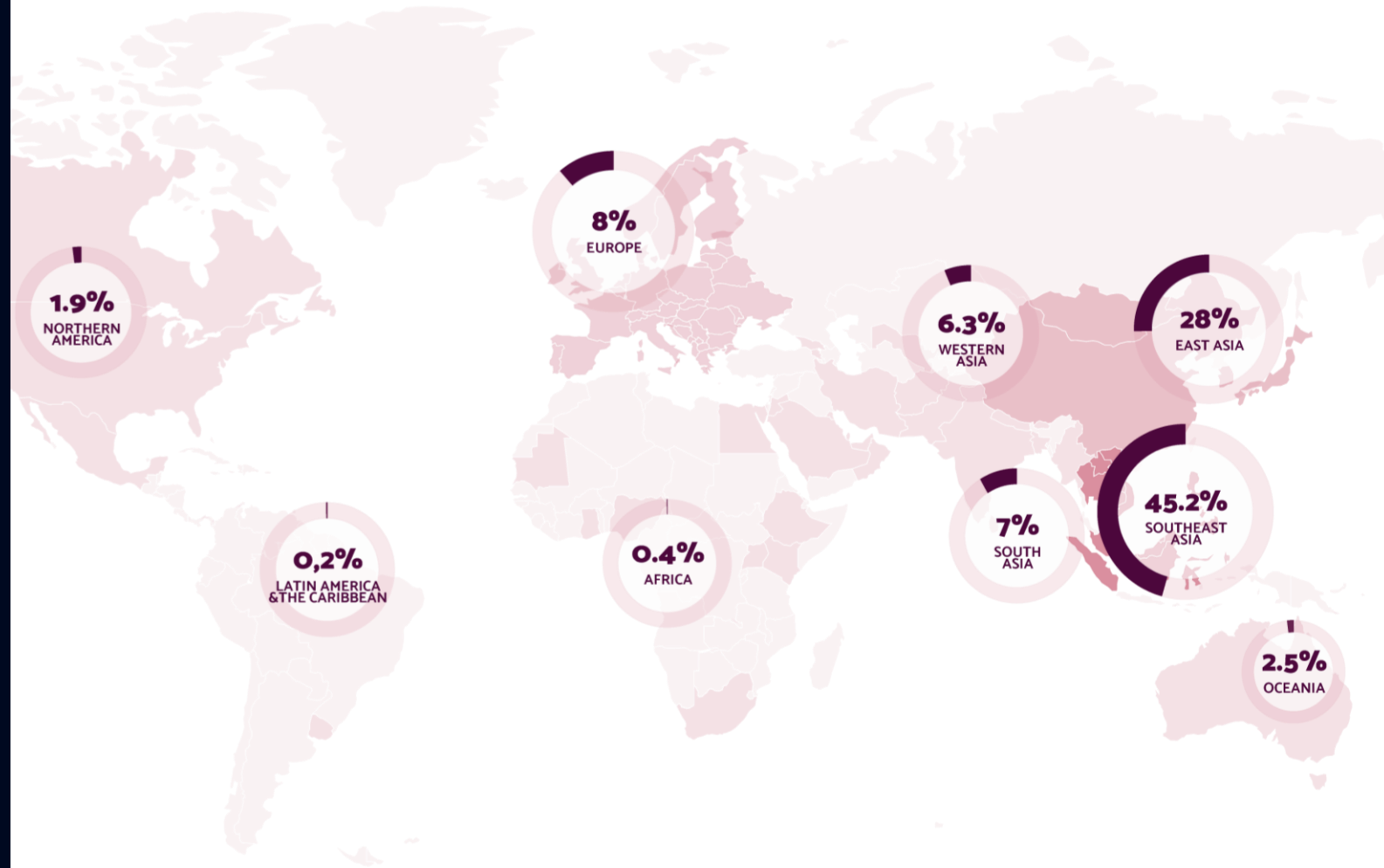
China 4.3%

Australia 2.1%

South Korea 1.5%

Japan 0.7%

2025-2027 Asia Pacific Economic outlook Growth by GDP



Southeast Asia 45.2%

East Asia 28%

Europe 8%

Western Asia 6.3%

South Asia 7%

Oceania 2.5%



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TFWA Workshop
Market Watch China
Wednesday, May 13
10h – 11h

Agora, World of Innovation



TFWA Workshop
Market Watch India
Wednesday, May 13
15h – 16h

Agora, World of Innovation

International passenger departures forecast (2026)

International Passengers (Pax in millions)

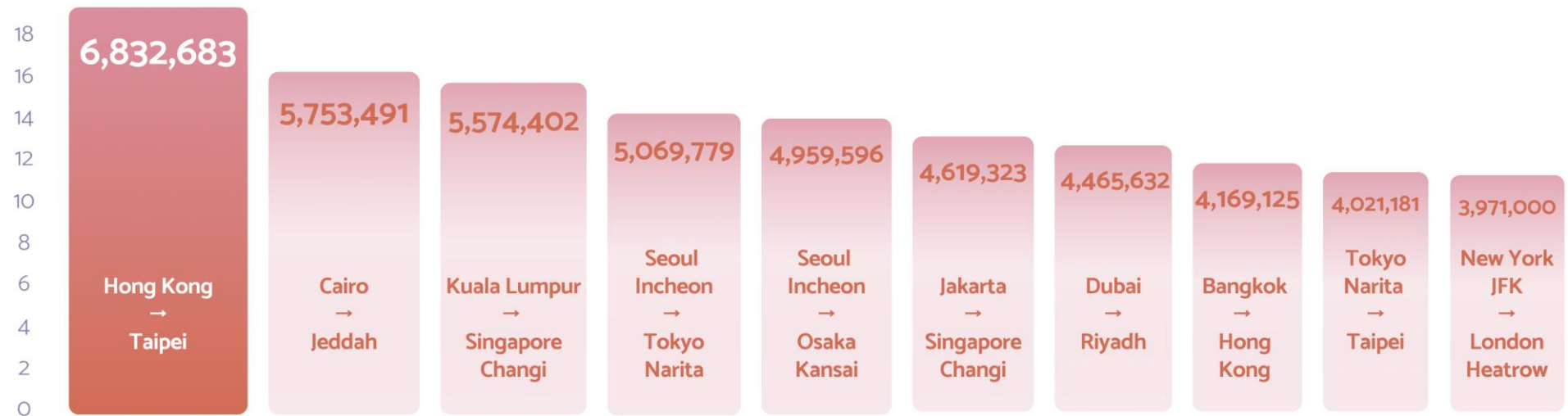
| | 2026 | YoY % |
|----------------------|--------------|-------------|
| Europe | 1 007 | 4.8% |
| Asia Pacific | 548.6 | 5.7% |
| Americas | 322 | 3% |
| Middle East - Africa | 288.5 | 0.2% |
| TOTAL | 2166 | 4.1% |

Asia Pacific Top 5 Countries (Pax in millions)

| | 2026 | YoY % |
|-------------|-------|-------|
| China | 73.97 | 6.8% |
| Japan | 55.88 | -2.3% |
| South Korea | 51.16 | 8.1% |
| Thailand | 41.23 | 5.8% |
| India | 39.78 | 0.1% |

Busiest cross-border airline routes by seats (2025)

By seats





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68.3%
of inbound travel to
Asia Pacific in 2025
came from within the
region.

Source: Euromonitor International, February 2026

Busiest cross-border airline routes by seats (2025)

| Sales | FY2025 | | | FY2024 | | |
|-----------------------------------|-----------------|-------------|---------------|-----------------|-------------|--------------|
| | Sales | YoY % 25-24 | Market Share | Sales | YoY % 24-23 | Market Share |
| Fragrances & Cosmetics | 24 452,4 | -3,2% | 32,2% | 25 260,9 | -2,3% | 34,0% |
| Fashion & Accessories | 12 061 | 4,7% | 15,9% | 11 520,4 | 1,4% | 15,5% |
| Wines & Spirits | 11 788,4 | 1,6% | 15,5% | 11 597,2 | 6,0% | 15,6% |
| Tobacco Goods | 9 512,3 | 11,4% | 12,5% | 8 537,5 | 13,3% | 11,5% |
| Watches, Jewellery & Fine Writing | 6 678,9 | 5,0% | 8,8% | 6 360,2 | 2,4% | 8,6% |
| Electronics, Gifts & Other | 6 007,9 | 2,5% | 7,9% | 5 863,1 | 8,5% | 7,9% |
| Confectionery & Fine Food | 5 452,7 | 7,7% | 7,2% | 5 062,9 | 8,0% | 6,8% |
| TOTAL | 75 953,6 | 2,4% | 100,0% | 74 202,2 | 3,1% | 100% |

Busiest cross-border airline routes by seats (2025)

| Sales in US\$ millions | FY2025 | | | FY2024 | |
|------------------------|-----------------|--------------|--------------|-----------------|-------------|
| | Sales | YoY % 25→24 | Market Share | Sales | YoY % 25→24 |
| Asia Pacific | 30 529.6 | -2.4% | 40.2% | 31 290.6 | -2.4% |
| Europe | 25 253.6 | +7.0% | 33.2% | 23 600.3 | +9.2% |
| Americas | 11 680.5 | +0.5% | 15.4% | 11 620.1 | +3.8% |
| Middle East | 7 433.4 | +9.5% | 9.8% | 6 786.2 | +7.3% |
| Africa | 1 056.6 | +16.8% | 1.4% | 904.9 | +15.8% |
| TOTAL | 75 953.6 | +2.4% | 100% | 74 202.2 | +3.1 |

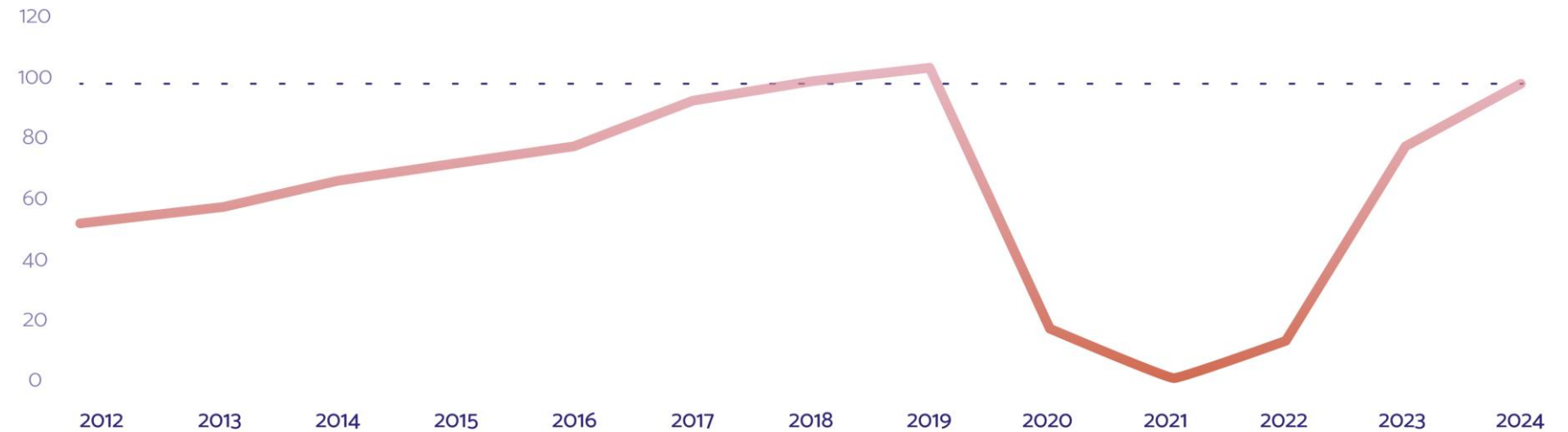
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Japan international air passengers Arrivals and departures, 2012 - 2024

(millions people)



Source: Nippon, September 2025.

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Incheon International Airport

74.07m passengers (2025)

Source: Generation Research, February 2026





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**Shanghai airports (Pudong
International Airport and
Hongqiao International Airport)**

135m passengers¹ (2025)

Beijing Capital Airport

70.7m passengers² (2025)

Sources: ¹ Shanghai International Airport Co., Ltd, January 2026 ; ² Beijing Capital Airport, April 2026.

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Changi Airport

69.98m passengers(2025)

Source: Changi Airport Group, 2026.





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Hong Kong International Airport

61m passengers (2025)

+15% vs 2024

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Sydney Airport

42.5m passengers (2025)



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Auckland Airport

Passenger spend increased
by **2%**

TFWA C-Suite:
The Innovator's Agenda
In conversation with
Auckland Airport
Thursday, May 14
10h – 10h30

Agora, World of Innovation

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Christchurch Airport
international visitors **+22%**
(2025)



Christchurch Airport

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Asia Pacific shopper profile and purchase drivers.

Shopper profile...

Male

52%

40 & Under

52%

Leisure

87%

1-2 trips per year

75%

Travelling alone

15%

Purchase drivers...

Good quality

36%

Cheaper price

22%

Well-known brand

22%

For a treat

20%

Attractive promotion

16%

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Taste
of the
World

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of the
World

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WORLD OF INNOVATION

TFWA C-Suite
L'Oréal
Monday, May 11
15h – 15.30h

TFWA C-Suite
Lagardère Travel Retail
Tuesday, May 12
12.30h – 13.15h

TFWA C-Suite
Gharage
Tuesday, May 12
15h – 15.45h

TFWA C-Suite
Auckland Airport
Thursday, May 14
10h – 10.30h

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Franck Waechter
Managing Director



Emilie Vin
PA to President &
Managing Director



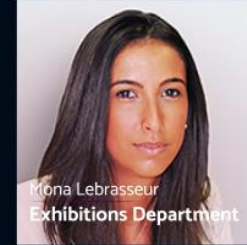
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Exhibitions Department



Liliane Da Cruz
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Isabelle Régnier
Exhibitions Department



Mona Lebrasseur
Exhibitions Department



Séverine Robbes
Exhibitions Department



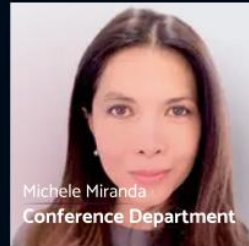
Nan Metals
Exhibitions Department



Cécile Lamotte
Marketing Department



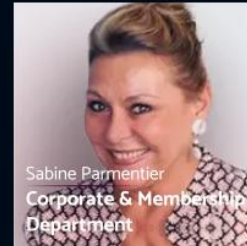
Maud Bruneau
Marketing Department



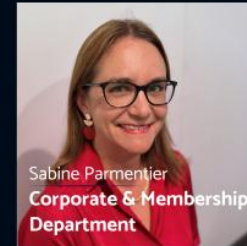
Michele Miranda
Conference Department



Lucia Ranz
Conference Department



Sabine Parmentier
Corporate & Membership
Department



Sabine Parmentier
Corporate & Membership
Department



Ana Homawoo
IT Department



Shakil Sobhun
IT Department



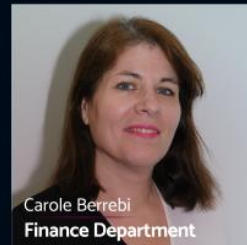
Christian Huynh
IT Department



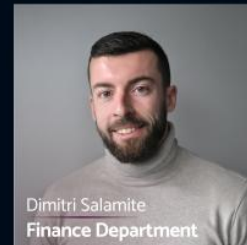
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Carole Berrebi
Finance Department



Dimitri Salamite
Finance Department



Hannah Gao
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Representative



Shigeru Kikuchi
TFWA Japan
Representative



Sean Kim
TFWA Korea
Representative



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9-13 MAY 2027 - SINGAPORE