

The background image shows an airport terminal with large windows. Two people are silhouetted against the bright light coming through the windows. One person is in the foreground, pulling a suitcase, and another is slightly behind and to the left. The floor is highly reflective, showing the silhouettes and the light from the windows. The overall mood is one of travel and movement.

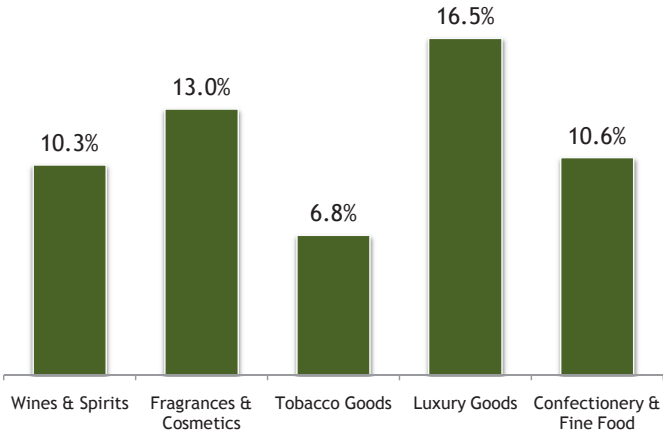
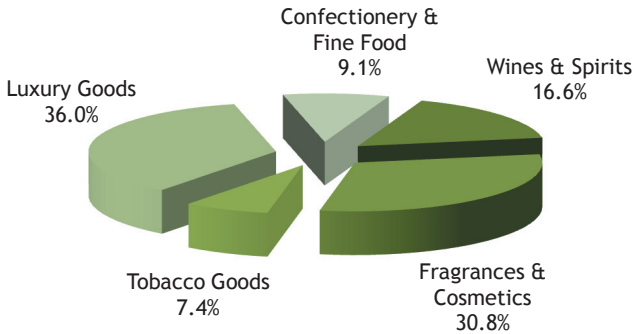
global duty free & travel retail sales 2011

year of data 2010

Global Duty Free & Travel Retail Sales 2010: *US\$ 39.0 billion*

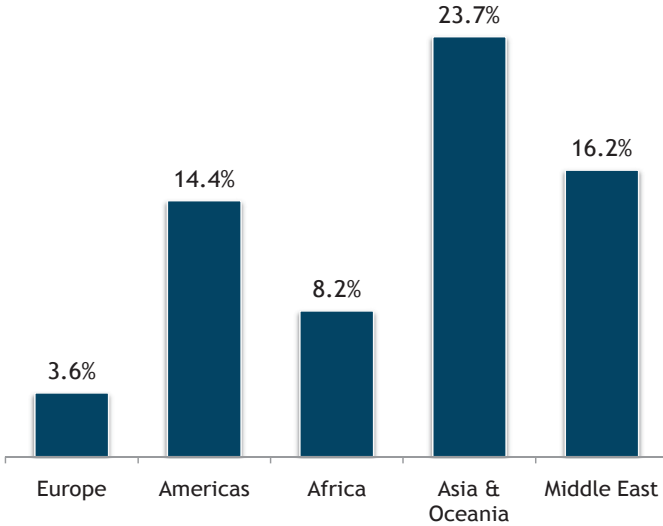
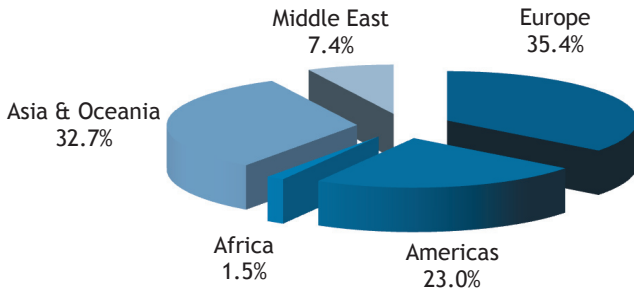
Share by Product Group

Statistical change 2010 vs 2009 in US\$



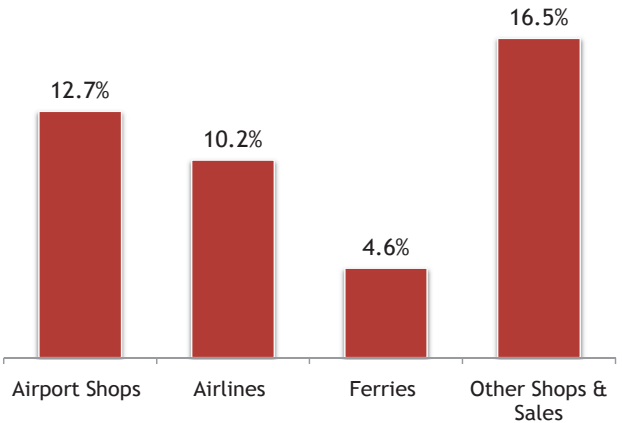
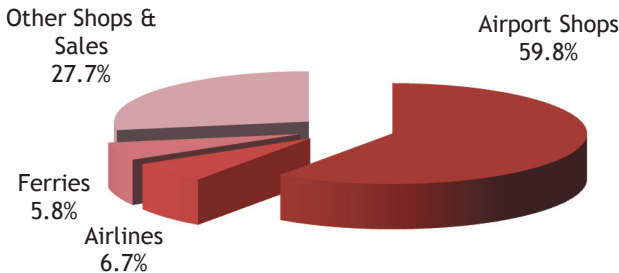
Share by Region

Statistical change 2010 vs 2009 in US\$



Share by Sales Channel

Statistical change 2010 vs 2009 in US\$



The World's Top 25 Countries in Duty Free & Travel Retail Shopping

2010

Airport, Airlines, Ferries & Other Shops

Sales in US\$ millions.

Rank	Country	Change - 2010 vs 2009 -		Market Share
		Statistical in US\$	Real in LCU	
1	South Korea	33.0%	20.8%	10.3%
2	United Kingdom	4.7%	6.0%	7.5%
3	U.S.A.	13.9%	13.9%	6.3%
4	China	32.8%	31.6%	4.5%
5	United Arab Emirates	14.0%	14.0%	4.3%
6	Hong Kong	35.8%	36.1%	3.9%
7	Singapore	22.7%	14.8%	3.4%
8	Germany	1.9%	7.0%	3.4%
9	France	5.9%	11.2%	3.0%
10	Brazil	35.2%	20.4%	2.3%
11	US Virgin Islands	-4.7%	-4.7%	2.3%
12	Japan	4.3%	-2.3%	1.9%
13	Spain	0.7%	5.7%	1.8%
14	Thailand	23.4%	13.8%	1.7%
15	Taiwan	41.3%	34.7%	1.6%
16	Italy	-0.4%	4.6%	1.6%
17	Norway	6.1%	1.9%	1.6%
18	Estonia	-3.1%	1.5%	1.5%
19	Turkey	15.1%	15.1%	1.5%
20	Finland	-12.4%	-8.0%	1.5%
21	Netherlands	2.3%	7.5%	1.5%
22	Russia	7.7%	3.6%	1.4%
23	Australia	8.2%	-6.8%	1.4%
24	Argentina	36.6%	43.6%	1.1%
25	Denmark	-1.2%	3.6%	1.1%
-	Other Countries	9.6%	7.7%	27.7%
	World Total	13.0%	11.0%	100%

Note: In addition to airports, airlines and ferries - above ranking includes sales in off-airport shops, downtown shops, border shops as well as some military and diplomatic sales.

LCU = Local Currency Units

Markets vs Sales Channels

2010

Sales in US\$ millions

	Airports	Airlines	Ferries	Other	TOTAL
Europe	9,955.3	1,194.5	2,140.7	510.6	13,801.0
Americas	3,235.3	444.0	93.0	5,184.9	8,957.2
Africa	468.4	78.9	29.2	21.7	598.2
Asia & Oceania	7,244.5	742.5	0.0	4,778.1	12,765.2
Middle East	2,400.7	169.2	0.0	308.4	2,878.4
TOTAL WORLD	23,304.1	2,629.1	2,263.0	10,803.7	39,000.0

Market Share %

	Airports	Airlines	Ferries	Other	TOTAL
Europe	42.7%	45.4%	94.6%	4.7%	35.4%
Americas	13.9%	16.9%	4.1%	48.0%	23.0%
Africa	2.0%	3.0%	1.3%	0.2%	1.5%
Asia & Oceania	31.1%	28.2%	0.0%	44.2%	32.7%
Middle East	10.3%	6.4%	0.0%	2.9%	7.4%
TOTAL WORLD	100%	100%	100%	100%	100%

The World's Top 50 Duty Free & Travel Retail Shops

2010

Ranking by actual and estimated retail sales in US\$ millions.

Rank	Location	
<i>Sales > US\$ 1,000.0 million</i>		
1	DUBAI - Dubai International Airport, U.A.E.	AIRPORT SHOP
2	SEOUL - Incheon Int'l Airport, South Korea	AIRPORT SHOP
3	LONDON - Heathrow Airport, UK	AIRPORT SHOP
4	SINGAPORE - Changi Airport, Singapore	AIRPORT SHOP
<i>Sales > US\$ 600.0 million</i>		
5	HONG KONG - Hong Kong International Airport, Hong Kong	AIRPORT SHOP
<i>Sales > US\$ 500.0 million</i>		
6	PARIS - Charles de Gaulle Airport, France	AIRPORT SHOP
7	FRANKFURT - Frankfurt-Main Airport, Germany	AIRPORT SHOP
8	TALLINK/SILJA LINE - All Routes, Estonia/Finland	FERRY OPERATOR
9	BANGKOK - Suvarnabhumi Airport, Thailand	AIRPORT SHOP
<i>Sales > US\$ 400.0 million</i>		
10	AMSTERDAM - Schiphol Airport, Netherlands	AIRPORT SHOP
11	SAO PAULO - Guarulhos Int'l Airport, Brazil	AIRPORT SHOP
12	OSLO - Gardermoen Airport, Norway	AIRPORT SHOP
<i>Sales > US\$ 300.0 million</i>		
13	TAIPEI - Taoyuan International Airport, Taiwan	AIRPORT SHOP
14	BEIJING - Capital Airport, China P.R.	AIRPORT SHOP
15	LONDON - Gatwick Airport, UK	AIRPORT SHOP
16	TEL AVIV - Ben Gurion Int'l Airport, Israel	AIRPORT SHOP
17	SHANGHAI - Pudong Airport, China, P.R.	AIRPORT SHOP
18	ISTANBUL - Atatürk Airport, Turkey	AIRPORT SHOP
<i>Sales > US\$ 200.0 million</i>		
19	CHEJU - Int'l Airport, South Korea	AIRPORT SHOP
20	MANCHESTER - Int'l Airport, UK	AIRPORT SHOP
21	VIKING LINE - All routes, Finland	FERRY OPERATOR
22	TOKYO - Narita Airport, Japan	AIRPORT SHOP
23	HONOLULU - Airport & Off-airport Shops, USA	AIRPORT SHOP
24	P&O FERRIES, UK	FERRY OPERATOR
25	ROME - Fiumicino Leonardo da Vinci Airport, Italy	AIRPORT SHOP
26	BUENOS AIRES - Ezeiza Airport, Argentina	AIRPORT SHOP
27	MOSCOW - Domodedovo Airport, Russia	AIRPORT SHOP
28	BRUSSELS - Bruxelles National Airport, Belgium	AIRPORT SHOP
29	DOHA - Airport, Qatar	AIRPORT SHOP
30	KUALA LUMPUR - Kuala Lumpur Int'l Airport, Malaysia	AIRPORT SHOP
31	MILAN - Malpensa Airport, Italy	AIRPORT SHOP
32	RIO DE JANEIRO - Galeao Airport, Brazil	AIRPORT SHOP
33	OSAKA - Kansai International Airport, Japan	AIRPORT SHOP
34	KOREAN AIR (KE), South Korea	SCHEDULED AIRLINE
<i>Sales > US\$ 100.0 million</i>		
35	SYDNEY - Kingsford Smith Airport, Australia	AIRPORT SHOP
36	MANILA - N. Aquino Int'l Airport & F S C, Philippines	AIRPORT SHOP
37	MADRID - Barajas Airport, Spain	AIRPORT SHOP
38	HELSINKI - Helsinki-Vaanta Airport, Finland	AIRPORT SHOP
39	O.R. TAMBO - International Airport, South Africa	AIRPORT SHOP
40	MOSCOW - Sheremetyevo Airport, Russia	AIRPORT SHOP
41	PANAMA CITY - Tocumen Airport, Panama	AIRPORT SHOP
42	ABU DHABI - Abu Dhabi International Airport, U.A.E.	AIRPORT SHOP
43	ANTALYA - International Airport, Turkey	AIRPORT SHOP
44	AUCKLAND - International Airport, New Zealand	AIRPORT SHOP
45	COLOR LINE - All routes, Norway	FERRY OPERATOR
46	ZURICH - Kloten Airport, Switzerland	AIRPORT SHOP
47	COPENHAGEN - International Airport, Denmark	AIRPORT SHOP
48	MUSCAT - Seeb International Airport, Oman	AIRPORT SHOP
49	BRITISH AIRWAYS (BA), UK	SCHEDULED AIRLINE
50	PALMA DE MALLORCA - Palma de Mallorca Airport, Spain	AIRPORT SHOP

The World's Top 25 Product Categories in Duty Free & Travel Retail

2010

Sales in US\$ millions.

- Rank -		Product Category	- 2010 -		Change 2010 vs 2009	
10	09		Sales in US\$ rounded millions	Market Share	Statistical in US\$	Real in LCU
1	1	WOMEN'S COSMETICS	5,090	13.1%	18.2%	16.5%
2	2	WOMEN'S FRAGRANCES	4,558	11.7%	9.8%	8.3%
3	3	CONFECTIONERY	2,784	7.1%	11.2%	9.2%
4	4	CIGARETTES	2,419	6.2%	7.7%	5.8%
5	5	MEN'S PRODUCTS	2,362	6.1%	8.8%	7.3%
TOTAL TOP 5			17,213	44.1%	11.9%	10.0%
6	7	SCOTCH WHISKY	2,011	5.2%	18.2%	16.1%
7	8	ACCESSORIES	1,998	5.1%	24.7%	22.5%
8	6	JEWELLERY	1,950	5.0%	14.6%	12.5%
9	9	LEATHER GOODS	1,826	4.7%	22.2%	20.0%
10	10	WATCHES	1,421	3.6%	12.2%	10.2%
TOTAL TOP 10			26,419	67.7%	14.1%	12.1%
11	11	STILL WINE	1,012	2.6%	0.3%	-1.5%
12	13	SUNGLASSES	1,004	2.6%	28.5%	26.2%
13	12	ELECTRONIC EQUIPMENT	958	2.5%	9.1%	7.2%
14	15	COGNAC	911	2.3%	25.8%	23.6%
15	14	FASHION & CLOTHING	899	2.3%	21.1%	19.0%
TOTAL TOP 15			31,203	80.0%	14.4%	12.4%
16	16	FINE FOOD	781	2.0%	8.6%	6.7%
17	17	CAMERAS	597	1.5%	10.6%	8.6%
18	18	WRITING INSTRUMENTS	531	1.4%	9.3%	7.4%
19	21	GIFT ITEMS	467	1.2%	9.8%	7.9%
20	20	AUDIOVISUALS	457	1.2%	6.9%	5.0%
TOTAL TOP 20			34,034	87.3%	13.9%	11.9%
21	19	LIQUEUR	439	1.1%	0.2%	-1.5%
22	22	CHAMPAGNE	434	1.1%	4.6%	2.7%
23	23	VODKA	398	1.0%	10.0%	8.0%
24	24	CIGARS	346	0.9%	4.7%	2.8%
25	25	LIGHTERS	301	0.8%	6.7%	4.8%
TOTAL TOP 25			35,952	92.2%	13.4%	11.4%
OTHER CATEGORIES			3,048	7.8%	9.0%	7.1%
WORLD TOTAL			39,000	100%	13.0%	11.0%

Remarks

The above ranking is based on 2008 world duty and tax free retail sales - all shops and market sectors considered. This ranking includes duty and tax free sales of all kinds of merchandise with the exception of sales of merchandise other than alcohol, tobacco and perfumery to the diplomatic corps, and the military; and the sales of domestically produced general goods (souvenirs, handicraft, etc.) as well as sales of general merchandise in downtown shops subject to tax-refund on departure from country concerned. Due to rounding the sum of constituent items in columns may not always tally with the accumulated sum totals.

Notes

LCU = Local Currency Units.

Product Groups

Their relative importance 2010 vs 2009

Sales in US\$ millions.	2 0 1 0		2 0 0 9		Change 2010 vs 2009		
	Sales	Market Share	Sales	Market Share	Statistical in US\$	Real in LCU	Market Share
Wines & Spirits	6,492.1	16.6%	5,887.7	17.1%	10.3%	8.3%	-0.4
Fragrances & Cosmetics	12,009.7	30.8%	10,628.1	30.8%	13.0%	11.4%	0.0
Tobacco Goods	2,885.2	7.4%	2,700.8	7.8%	6.8%	4.9%	-0.4
Luxury Goods	14,047.9	36.0%	12,060.7	35.0%	16.5%	14.4%	1.1
Confectionery & Fine Food	3,565.1	9.1%	3,222.7	9.3%	10.6%	8.7%	-0.2
TOTAL	39,000.0	100.0%	34,500.0	100%	13.0%	11.0%	

Regions

Their relative importance 2010 vs 2009

Sales in US\$ millions.	2 0 1 0		2 0 0 9		Change 2010 vs 2009		
	Sales	Market Share	Sales	Market Share	Statistical in US\$	Real in LCU	Market Share
Europe	13,801.0	35.4%	13,321.1	38.6%	3.6%	5.9%	-3.2
Americas	8,957.2	23.0%	7,827.5	22.7%	14.4%	12.5%	0.3
Africa	598.2	1.5%	552.7	1.6%	8.2%	5.6%	-0.1
Asia & Oceania	12,765.2	32.7%	10,320.9	29.9%	23.7%	16.1%	2.8
Middle East	2,878.4	7.4%	2,477.7	7.2%	16.2%	16.3%	0.2
TOTAL	39,000.0	100%	34,500.0	100%	13.0%	11.0%	

Sales Channels

Their relative importance 2010 vs 2009

Sales in US\$ millions.	2 0 1 0		2 0 0 9		Change 2010 vs 2009		
	Sales	Market Share	Sales	Market Share	Statistical in US\$	Real in LCU	Market Share
Airport Shops	23,304.1	59.8%	20,676.2	59.9%	12.7%	10.7%	-0.2
Airlines	2,629.1	6.7%	2,385.8	6.9%	10.2%	8.3%	-0.2
Ferries	2,263.0	5.8%	2,163.0	6.3%	4.6%	2.8%	-0.5
Other Shops & Sales	10,803.7	27.7%	9,275.0	26.9%	16.5%	14.4%	0.8
TOTAL	39,000.0	100%	34,500.0	100%	13.0%	11.0%	

Remarks:

Due to rounding the sum of constituent items in columns may not always tally with the accumulated sum totals.

LCU = Local Currency Units.