

Duty-Free and Travel Retail Market - Global Outlook and Forecast 2018-2023

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Abstracts

This market research report on global duty free and travel retail market offers analysis on market size & forecast, market share, industry trends, growth drivers, and vendor analysis. The market study also includes insights on segmentation by products (fragrance and cosmetics, liquor, fashion and accessories, tobacco goods, electronics, watches, and confectionery) and by geography (APAC, Europe, Americas, Middle East, and Africa).

Duty-Free and Travel Retail Market - Overview

The growing demand for retail chains that offer luxury and premium brands of various products is augmenting the growth of the global duty-free and travel retail market. These distribution channels provide passengers value, enhance their experience while traveling, generate value addition to economic activity, and creates employment that contributes to overall GDP across the global market. The rising popularity of the travel and tourism industry is one of the primary factors in the global market. These services enhance the experience and value for money which enables consumers to shop premium and luxury brands at discounted price in the global market. The idea of temporary spaces that offer end-users extra time after security check-in and allows them to get entertained, excited, and indulgent with the ambiance and experience of shopping for international products. The increasing focus on digitalizing the retailing process so that they could maximize their profit and convert more customers will boost sales in the global market. Various leading vendors are providing easy home delivery options and innovative customer services that improve their satisfaction levels and contributes to the growing revenues in the global duty-free and travel retail market. The benefit of attractive prices, service, convenience, recognition, and high-end product merchandising are some of the factors that will promote the evolution of the retail

industry.

The growing number of international tourist, rising number of middle-class family, and increasing number of low-cost carrier (LCC) airlines will fuel the growth of the global market. The leading brands are opening exclusive stores for special products, promoting, and selling limited editions to increase their visibility and brand awareness in the global market. The global duty-free and travel retail market is estimated to generate revenues of around \$112 billion by 2023, growing at a CAGR of approximately 8% during 2018-2023.

Duty-Free and Travel Retail Market - Dynamics

The rising number of middle-class population and rapid urbanization is propelling the growth of the global duty-free and travel retail market. The increase in disposable income, improvement of standard living, and affordability and convenience of air travel are boosting the number of middle-class population traveling and purchasing products from these stores in the global market. The leading vendors are developing consumer-focused businesses especially for this end-user segment to boost their travel retail industry size over the next few years. In emerging countries such as India and China, middle-class consumers are the largest contributors to the economic development and have the spending capacity to promote the growth of the duty-free industry in the global market. With the surge in middle-class median income, their expenditure trend, traveling mode, and demand for premium brands will also rise, thereby, fueling the travel retail sales. The rapid development and urbanization will augment the development of infrastructure and offer access to better amenities in the global market. The building of new airports and ports will boost the revenues in the global duty-free and travel retail market.

Duty-Free and Travel Retail Market - Segmentation

This market research report includes a detailed segmentation of the market by products and by geography.

Duty-Free and Travel Retail Market – By Products

Demand for premium perfumes to boost sales in the global duty-free and travel retail market during the forecast period

The global duty-free and travel retail market by product is segmented into fragrance and cosmetics, liquor, fashion and accessories, tobacco goods, electronics, watches, and confectionery. The fragrance and cosmetics dominated the majority of the market share

in 2017, growing at a CAGR of approximately 10% during the forecast period. The growing demand for premium perfumes and growing popularity of make-up amongst the women of all age is propelling the growth of this segment in the global market. The increasing number of professional working woman and rise in the travel frequency are some of the other factors augmenting the demand in the global market. The emergence of several dedicated outlets with modern and customer interactive designs will help vendors attract a large number of consumers in the market. The players are providing pop-up stores that provide a range of personalized treatments, demonstrations, services, and giftwith purchase to boost revenues in the global duty-free and travel retail market. Additionally, rapid urbanization and boost in economic development across several emerging countries are driving the growth of this segment in the global market.

Duty-Free and Travel Retail Market – By Geography

Introduction of LCC across APAC to transform the global duty-free and travel retail market during the forecast period

The geographical segment in the global duty-free and travel retail market is categorized into APAC, Europe, Americas, Middle East, and Africa. APAC occupied more than 1/3rd of the market share in 2017, growing at a CAGR of over 11% during the forecast period. The growing number of new air routes and the introduction of LCC carriers is one of the main factors promoting the development of the APAC region in the global duty-free and travel retail market. The rise in the consumption size and the purchasing power across China and India will have a positive impact of the market in this region. The growing preference for differentiated and value-added products is boosting the desire to travel among the population in APAC will boost the demand in the duty-free industry. The adoption of new lifestyles and the introduction of cheap destination travel packages by companies such as Thomas Cook, MakeMyTrip, Cleartrip, Expedia, Yatra, Golbibo will result in the growth of the global duty-free and travel retail market. Furthermore, the rapid penetration on social media and digitalization of the economy will create lucrative opportunities for vendors operating in the APAC market during the forecast period.

Key Countries Profiled

The key countries profiled in the report are:

China

South Korea

UK

France

US

Brazil

Key Vendor Analysis

The global market is highly fragmented, and top players dominated the majority market share. The boom of the travel and tourism industry is encouraging the consumers to open new outlets and chains in the global duty-free and travel retail market. The increasing focus on offering a diverse and wide range of product collection will enable vendors to attract a large number of consumers and gain a larger market share. The adoption of innovative promotional campaigns and attractive price offerings will help the players sustain the competition in the global duty-free and travel retail market. The procurement of super-premium and luxury products will help companies gain a competitive advantage over other vendors in the market during the forecast period.

The major vendors in the global market are:

Dufry AG

Gebr. Heinemann

Lotte

Lagardere Travel Retail Group

Other prominent vendors include DFS, Shilla, China Duty Free Group Co.Ltd., King Power International, Duty Free Americas, Inc., AER Rianta International, Dubai Duty Free, James Richardson Group, Qatar Duty Free, and Flemingo International.

Key market insights include

1. The analysis of global duty-free and travel retail market provides market size and

growth rate for the forecast period 2018-2023.

2. It offers comprehensive insights into current industry trends, trend forecast, and growth drivers about the global duty-free and travel retail market.

3. The report provides the latest analysis of market share, growth drivers, challenges, and investment opportunities.

4. It offers a complete overview of market segments and the regional outlook of global market.

5. The report offers a detailed overview of the vendor landscape, competitive analysis, and key market strategies to gain competitive advantage.

Report Snapshot

The global duty-free and travel retail market size is expected to generate revenues of around \$112 billion by 2023, growing at a CAGR of approximately 8% 2018–2023.

The global duty-free and travel retail market is driven by the increasing focus on digitalization of travel retail industry. The rise in the outbound tourists, a strong economy, the opening of new routes, and growing middle-class desire for air travel are some of the factors driving the development of the global market. The market research report provides in-depth market analysis and segmental analysis of the global duty-free and travel retail market by product and geography.

Base Year: 2017

Forecast Year: 2018–2023

The report considers the present scenario of the global duty-free and travel retail market and its market dynamics for the period 2018-2023. It covers a detailed overview of various market growth enablers, restraints, and trends. The study covers both the demand and supply sides of the market. It also profiles and analyzes the leading companies and various other prominent companies operating in the market.

Major Vendors in the Duty-Free and Travel Retail Market

Dufry AG

Business Overview

Major Product Offerings

Key Strategies

Key Strengths

Key Opportunities

Gebr. Heinemann

Lotte

Lagardere Travel Retail Group

Prominent Players in the Duty-Free and Travel Retail Market

DFS

Business Overview

Product Offerings

Shilla

China Duty Free Group Co.Ltd.

King Power International

Duty Free Americas, Inc.

AER Rianta International

Dubai Duty Free

James Richardson Group

Qatar Duty Free

Flemingo International

Market Segmentation by Products

Fragrance and Cosmetics

Liquor

Fashion and Accessories

Tobacco Goods

Electronics

Watches

Confectionery

Market Segmentation by Geography

APAC

China

South Korea

Europe

UK

France

Americas

US

Brazil

Middle East

Africa

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