

Airport Retail Market: Current Analysis and Forecast (2025-2033)

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Abstracts

Airport retailing is an industry that involves selling goods to travelers within airports through terminals. It comprises duty-free stores and shops selling goods such as cosmetics, electrical appliances, clothes, groceries, food and beverages, and other souvenir shops. These are located mainly at the arrival and departure hall, gate area, and waiting areas in the airport terminals. Airport retail targets international as well as domestic passengers. They rely on passengers' willingness to buy on the spot and their purchasing capabilities. Apart from contributing towards revenue generation through commercial transactions, airport retail plays an important role in transforming the passenger experience and is one of the most important sources of non-aeronautical revenue for airports.

The Airport Retail market is set to show a growth rate of about 9.4% during the forecast period (2025-2033F). Airport retail has been experiencing continuous rapid growth because of the expanding number of people using flight services, a growing per capita income, and changes in consumer trends. The number of people who use airports for business, leisure, and tourism purposes continues to increase, thus offering growth for retailers. Passengers are likely to shop during the time between security screening and boarding and are generally visiting during the end of trips to purchase travel products, gifts, duty-free products, and premium products. Moreover, the trend of impulse buying and convenience shopping, as well as the necessity of acquiring exclusive products that cannot be purchased in the store located in another city, increases the demand for the airport retail market.

Based on airport type, the market is segmented into domestic and international airports. Among these, the international airports have the largest share of the airport retail market because people with higher disposable income spend more,

there are no taxes on products sold at these airports, and there are higher premium and luxury brands available at these airports. International passengers have longer transit times and are also likely to make purchases of souvenirs and other luxury items, and contribute largely to the consumption expenditure.

Based on the product category, the market is segmented into liquor and tobacco, perfumes and cosmetics, fashion and accessories, food and beverages, and others. Among these, the liquor and tobacco sector occupies the largest market share in the airport retail market. This is mainly because many people prefer to purchase duty-free alcoholic and tobacco products as these are cheaper compared to similar products at domestic markets. These products are also highly profitable and are situated in prime retail sites in most of the international airports. However, the Perfumes and Cosmetics segment is expected to show future growth due to increased awareness regarding beauty, the availability of premium products, and the increasing number of women travelers. Consumers purchase cosmetics, perfume, and skincare products at airports because they are most likely to get new and travel-sized products at lower prices in airport stores due to tax exemptions.

Based on the store type category, the global market is categorized into duty-free retail and duty-paid retail. Among these, the duty-free retail market holds the highest market share, as it has massive attractiveness towards the global travelers, where they get tax exemptions on numerous products such as perfumes, wines, tobacco, etc. Duty-free stores are mostly set up in international airports with considerable consumer traffic, such as businessmen and holidaymakers, especially in airports such as those in Dubai, Singapore, and Heathrow. However, the duty-paid retail market is predicted to grow more in the future due to factors such as the rising volume of domestic flights, the opening of new regional airports, and changing preferences of passengers for convenience stores as well as daily commodities.

For a better understanding of the market adoption of airport retail, the market is analyzed based on its worldwide application in countries such as North America (U.S., Canada, and the Rest of North America), Europe (Germany, U.K., France, Spain, Italy, Rest of Europe), Asia-Pacific (China, Japan, India, Rest of Asia-Pacific), Rest of World. Among these, the North America region holds a significant market share due to the presence of key players within the region, well-developed airport infrastructure, as well as a high number of air travelers.

However, the Asia-Pacific airport retail market is moving forward due to increasing disposable income, rapid development of airports, and increasing interest of people in traveling abroad.

Some major players running in the market include Avolta AG, Dubai Duty Free, Airport Retail Group, LLC, Duty Free Americas, Inc., Flemingo International, Gebr. Heinemann SE & Co. KG, Japan Airport Terminal Co., Ltd., King Power Group, Lagardère Travel Retail (Lagardère Group), Hotel Shilla CO., Ltd.

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