



جمعية الشرق الأوسط و أفريقيا للأسواق الحرة
MIDDLE EAST & AFRICA
DUTY FREE ASSOCIATION

Lagardère
TRAVEL RETAIL

DELIVERING THE PROMISE

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Chairman, Chief Executive Officer

November 28th 2016





KEY FIGURES

Lagardère Travel Retail a global player

2015

€3.1bn
Proportional sales



31
countries



16,000
employees



220
airports



Lagardère Travel Retail a global player

2015 vs 2011

+ 12
countries



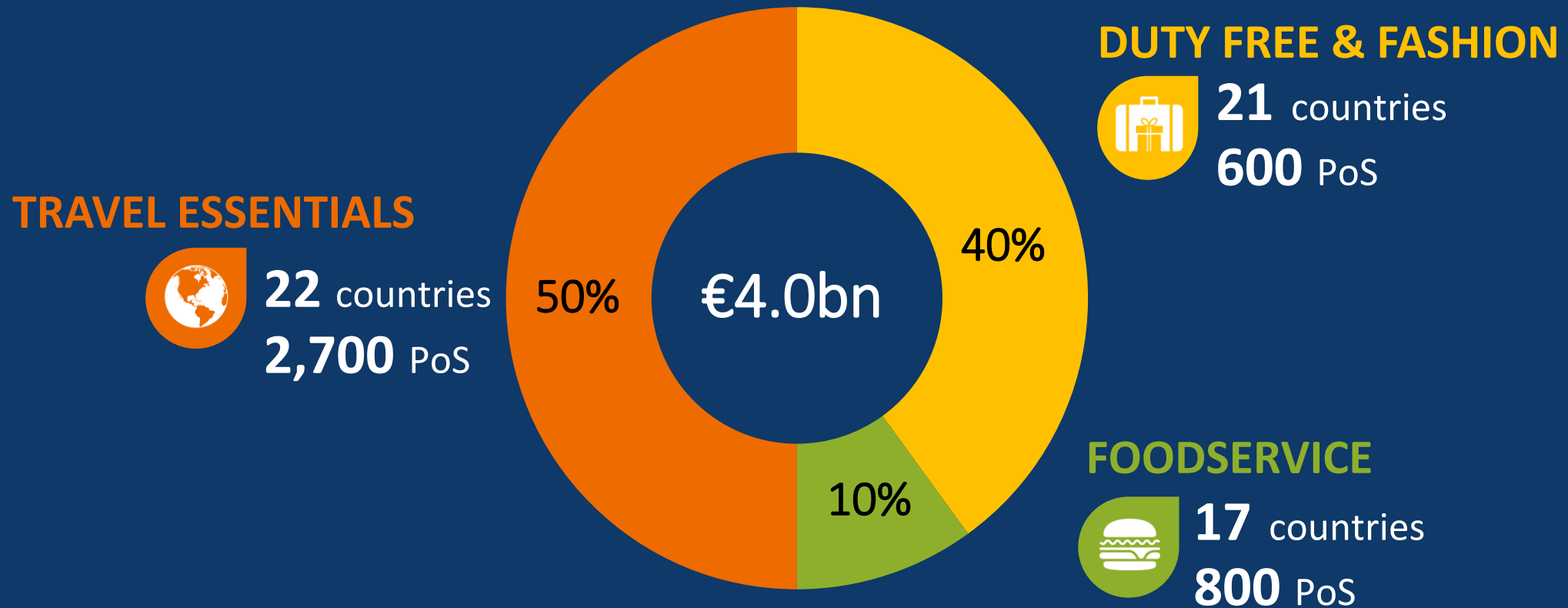
+ €1bn
prop. sales



+100
airports

A global leader in three businesses

Lagardère Travel Retail sales and ranking by business (sales @100% pro-forma¹) 2015)



Lagardère Travel Retail in the Middle East

1st Relay store opening in Abu Dhabi



Abu Dhabi Food Services: contract awarded



Dammam & Jeddah Duty Free contracts awarded



Abu Dhabi Duty Free opening



2008

December 2015

October 2016

2017

2018

2009

May 2016

November 2016

Abu Dhabi Duty Free: contract awarded

Riyadh Duty Free contract awarded

Dammam, Riyadh, Jeddah Duty Free openings

Airst Middle East: Briccofé in Abu Dhabi



In 2 years time: Lagardère Travel Retail in Middle East:

In 2018: 12,300 sqm, 28 stores, US\$ 320m sales/year

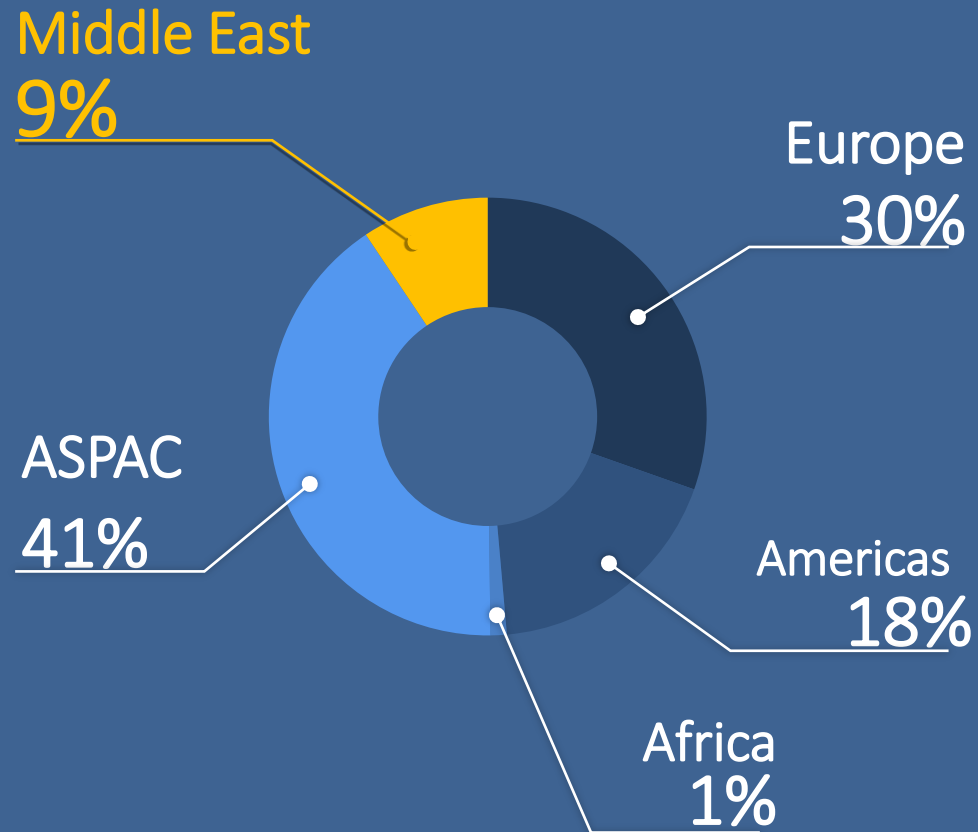


Passengers profiles in Middle East: a wide diversity by airport



Growth in Middle East: from double to single digit

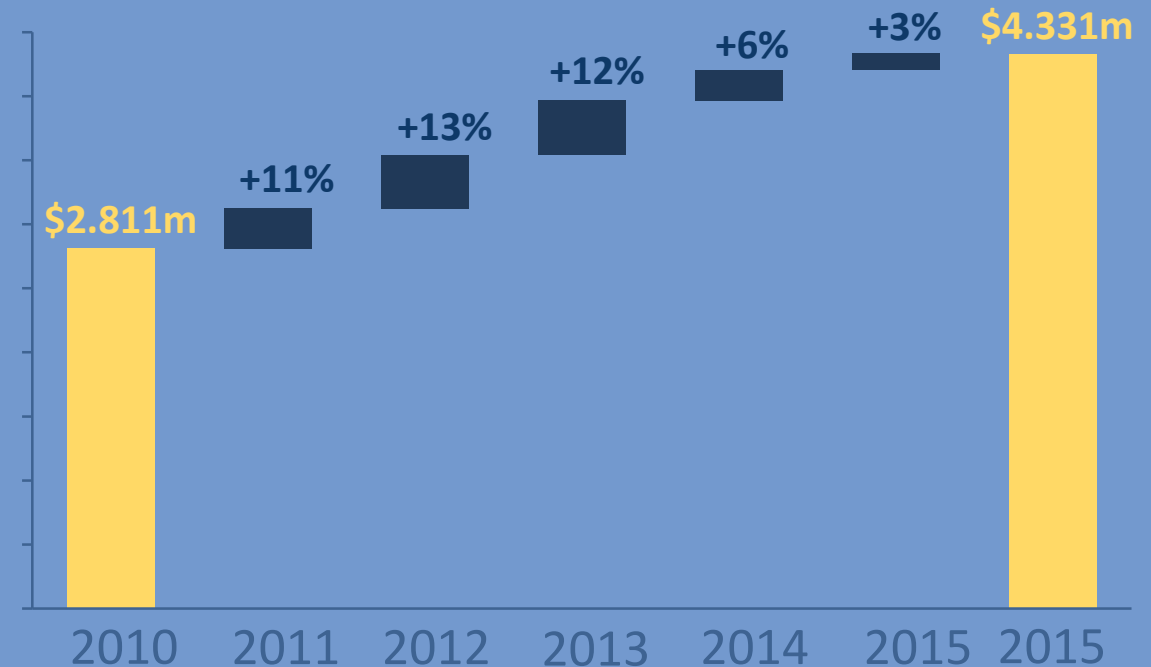
Global Duty Free & Travel Retail Sales 2015 (US\$)



Sources : Generation Research 2015

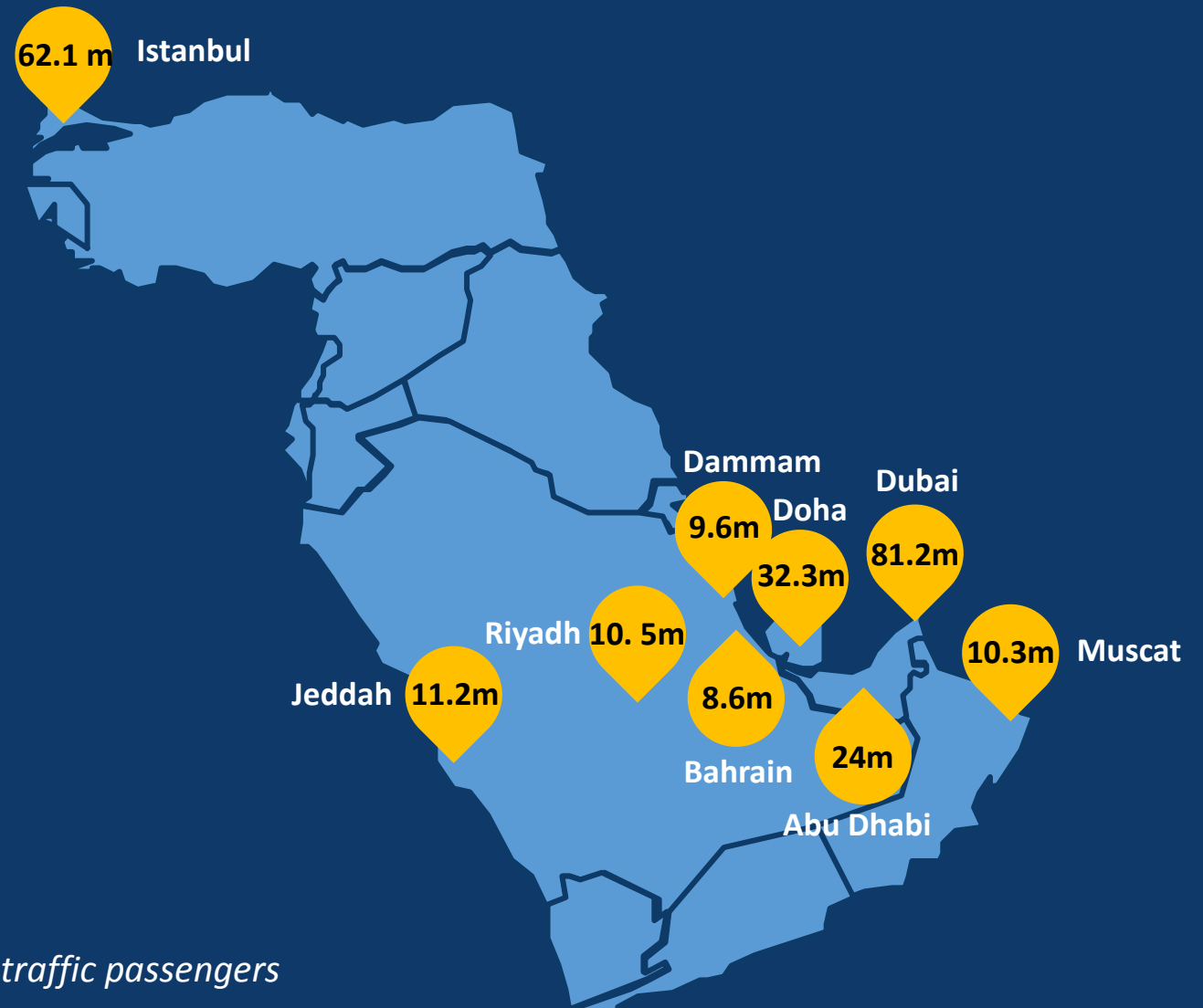
Sales evolution of the Middle East duty-free market (from 2011 to 2015), %

US\$ Millions



Opportunity: big spenders but high concentration of airports/hubs?

Region	Average basket (US\$)
Middle East	\$150
European	\$80
ASPAC	\$85
American	\$90



Sources : CIR average basket according to nationalities & airport traffic passengers



**DELIVERING
THE PROMISE**

Lagardère Travel Retail: delivering the promise in the Middle East



LOCAL UNIQUENESS



RETAIL EXCELLENCE



PARTNERSHIPS

Local uniqueness

Localized design



SPECTACULAR
BESPOKE
DESIGN

Local uniqueness

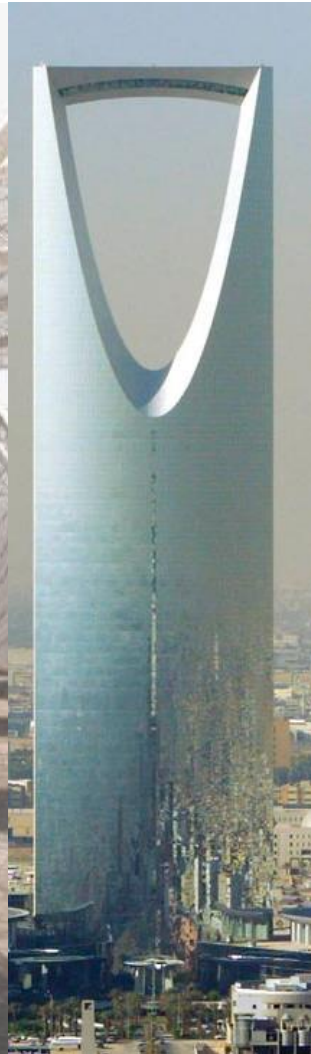
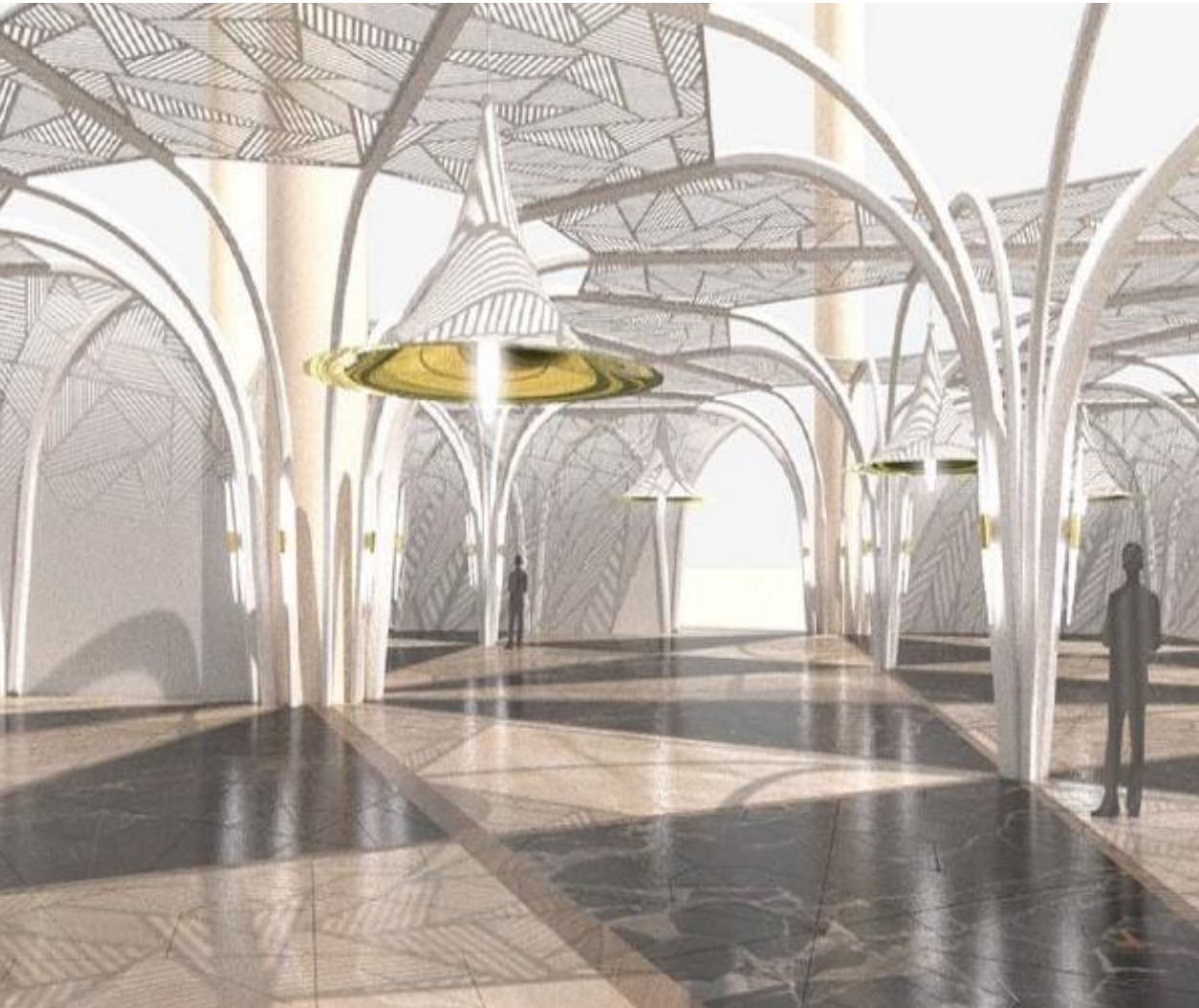
Localized design



SPECTACULAR
BESPOKE
DESIGN

Local uniqueness

Localized design



UNIQUE
TAILORED
DESIGN

Retail excellence

Unique offer catering for each passenger



Retail excellence

Multi sensorial category experiences



LIQUOR
DISCOVERY
DESK

Retail excellence

Multi sensorial category experiences



OUD SENSORIUM

Retail excellence

The Art of the gift: bespoke service protocol



OSCAR

“Art of the gift”
SERVICES SIGNATURES



Partnerships

Exceptional business partnerships in the Middle East

Abu Dhabi
Joint-venture



Saudi Arabia Joint-venture

Abu Dhabi | أبو ظبي
Capital Group | كابيتال جروب



إسناد المهمات الأرضية
Ground Handling Logistic

SAUDI AIRLINES
CATERING



الخطوط السعودية
للتعامد

The background features a dark blue field with glowing white and light blue lines that create a sense of depth and movement. In the lower-left quadrant, there is a perspective view of a grid of glowing blue squares, suggesting a digital or technological landscape. A large, semi-transparent dark blue circle is positioned on the right side of the image, serving as a backdrop for the text.

INNOVATION

New shopping behaviors



A NEW PLAYGROUND FOR TRAVEL RETAILERS

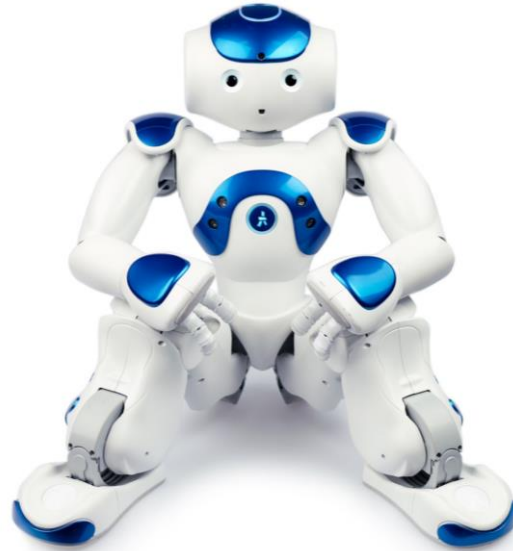
Lagardère Travel Retail : Omni-channel retailer

ONLINE

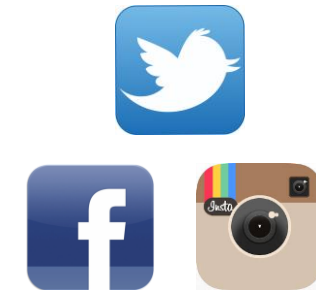


**&CLICK
COLLECT**

AIRPORT



CRM





SENSATIONAL “LE CLUB FASCIA” SHOW

Lighting - movies - sound

Innovative partnerships : innovation ecosystem for Abu Dhabi



VIRTUAL REALITY



DISTRIBUTED PRODUCTION



EXPERIENCE NEW HORIZONS EVERY DAY

Lagardère
TRAVEL RETAIL