



DUBAI DUTY FREE



VIEW FROM DUBAI MEADFA 2023

Nov 21st, 2023

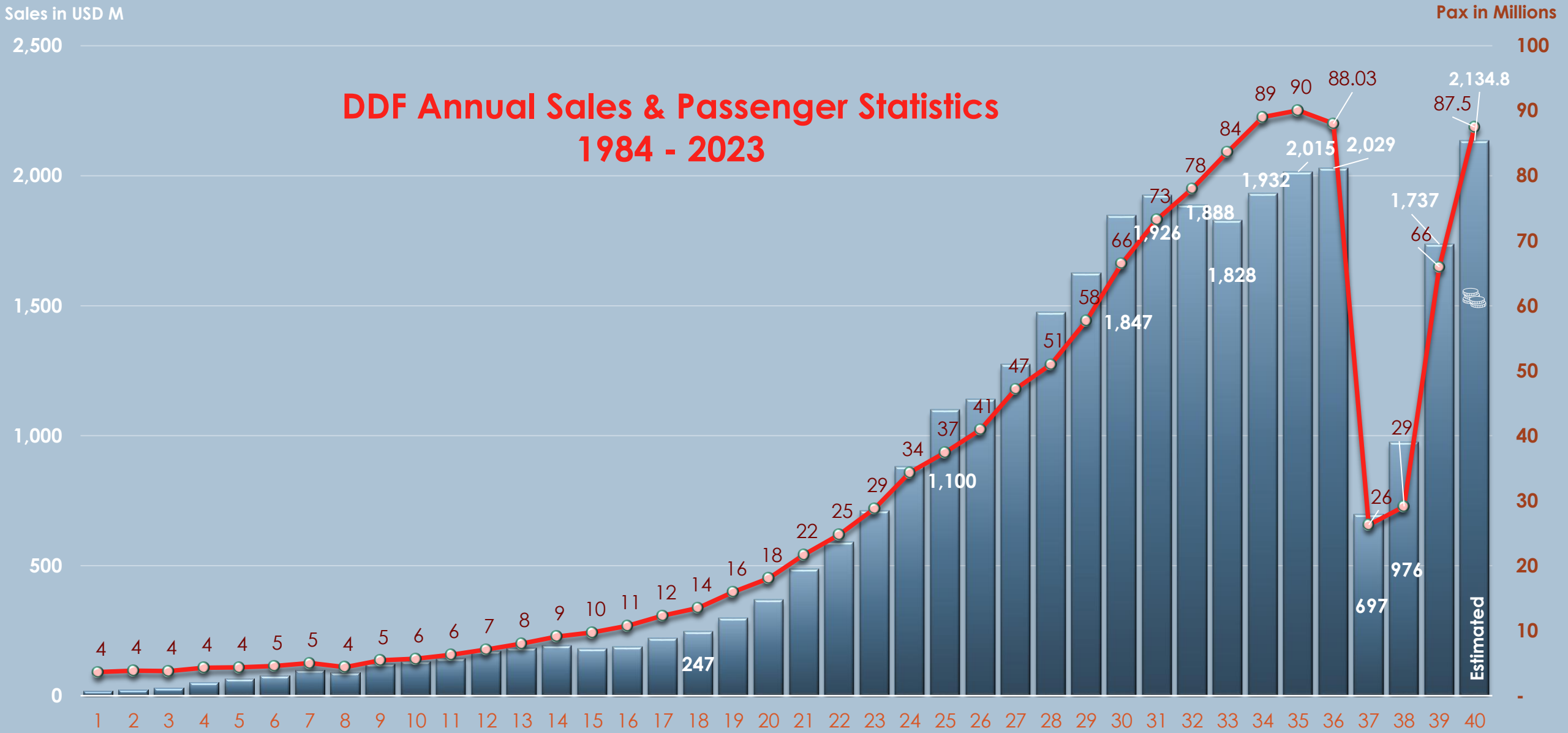
Ramesh Cidambi

Chief Operating Officer

Dubai Duty Free

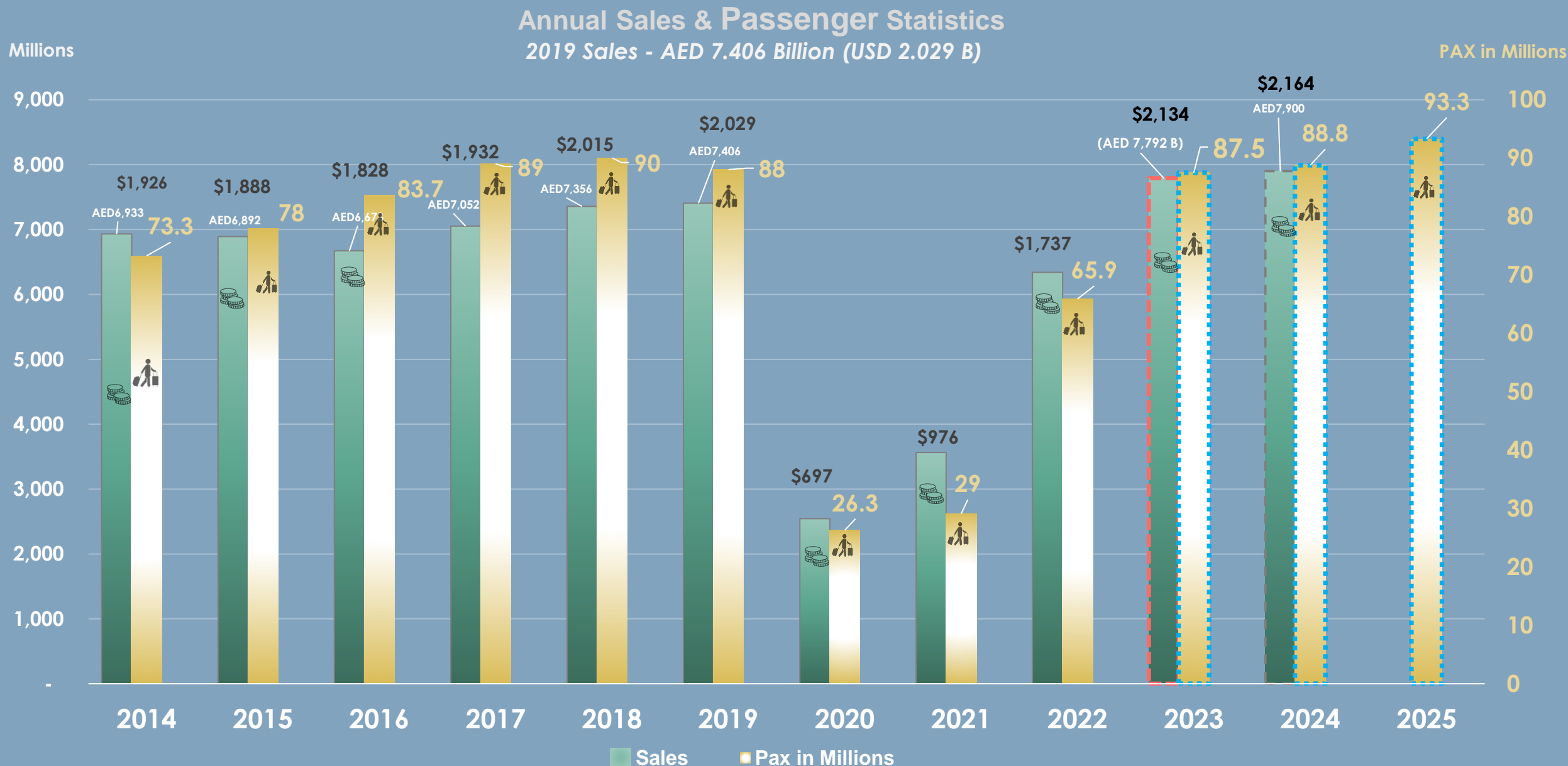


Sales vs Passengers – 40 Years



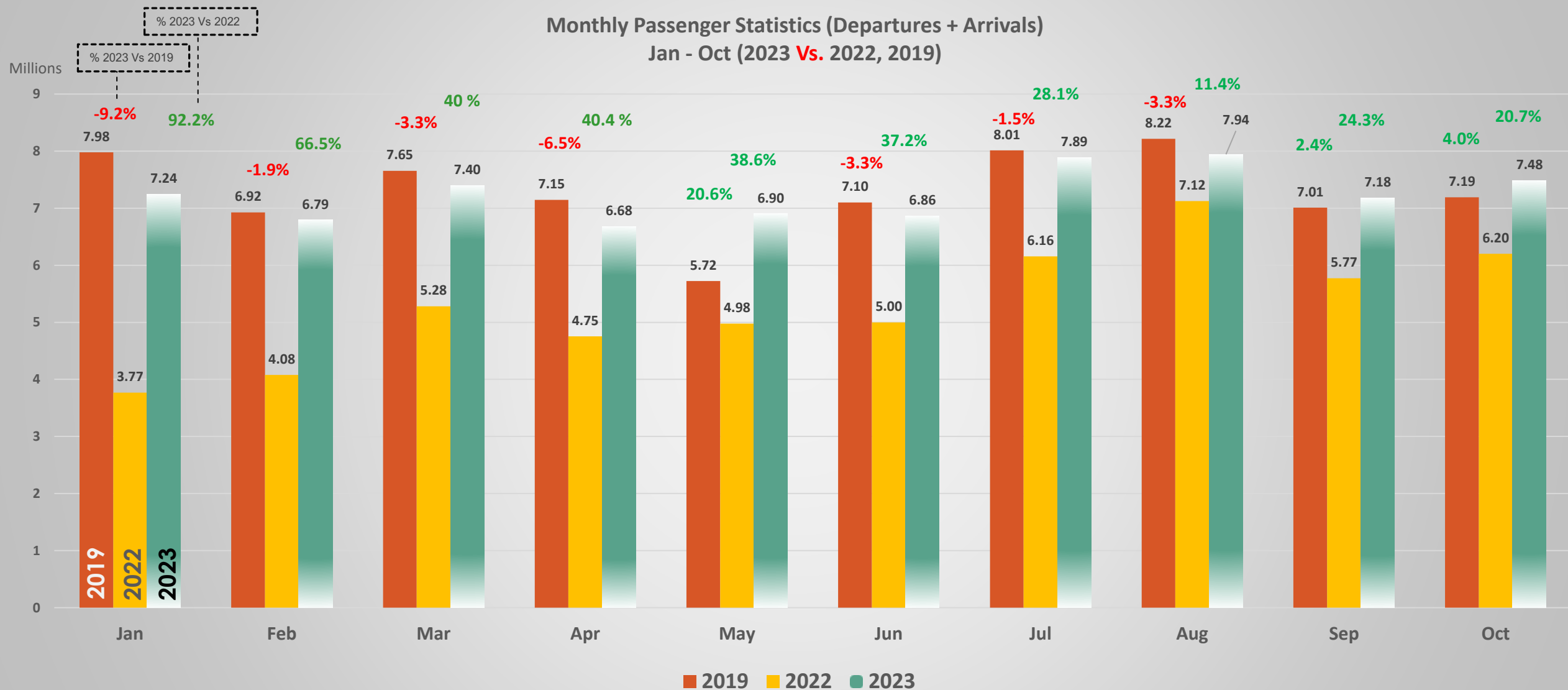
CAGR over 39 Yrs. 12.85% Sales, 8.5% PAX

Sales vs Passengers (2014 – 2025)



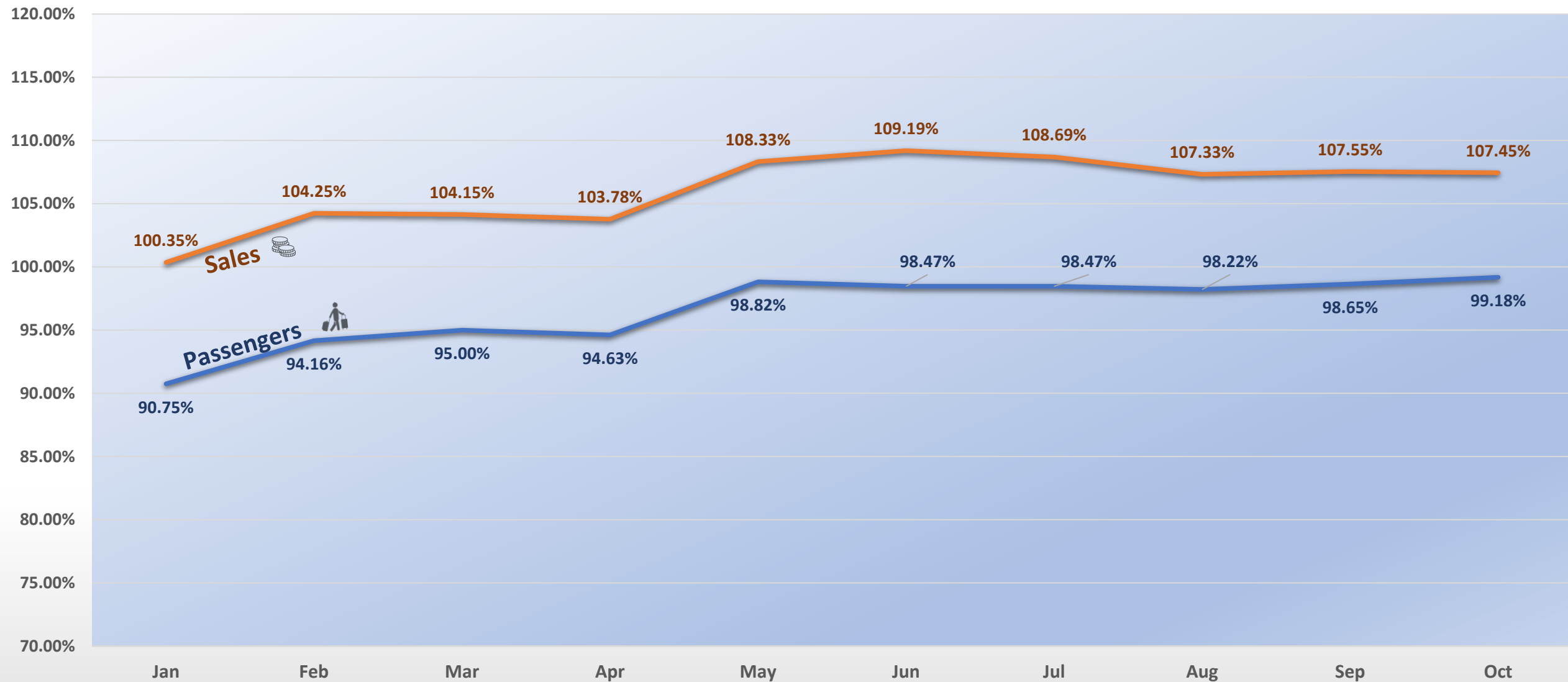


DDF | PAX Statistics – 2023 Jan to Oct



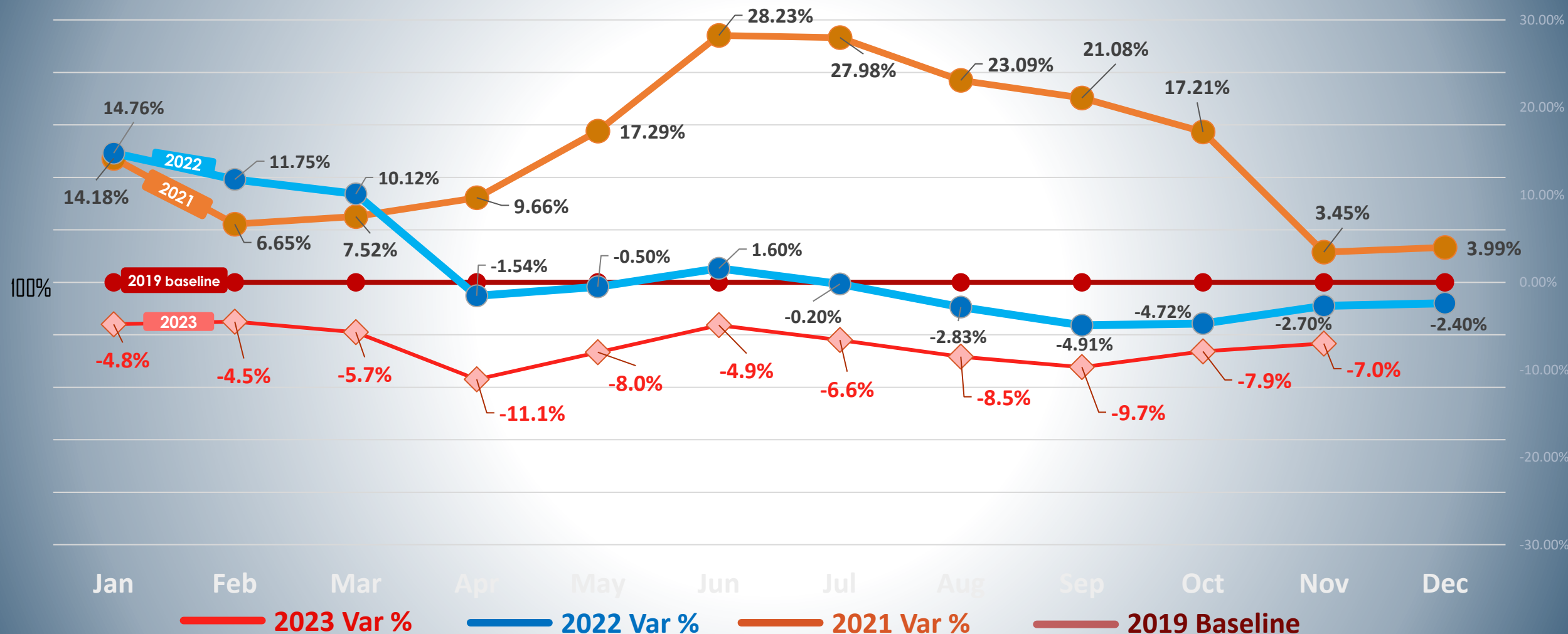


DDF | PAX Vs Sales Recovery – 2023 YTD



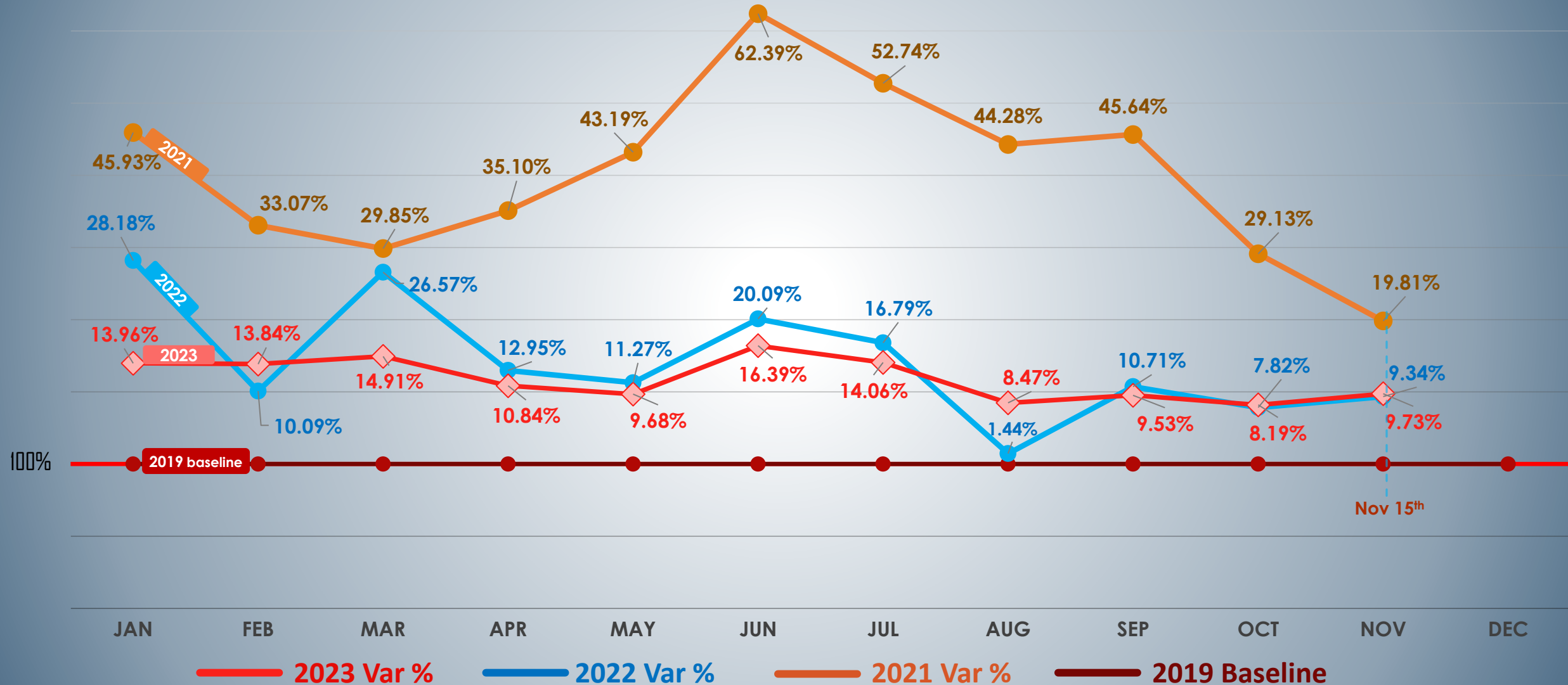
Retail Business – Penetration Rate

2023, 2022, 2021 (Jan – Dec) % To 2019 (baseline)

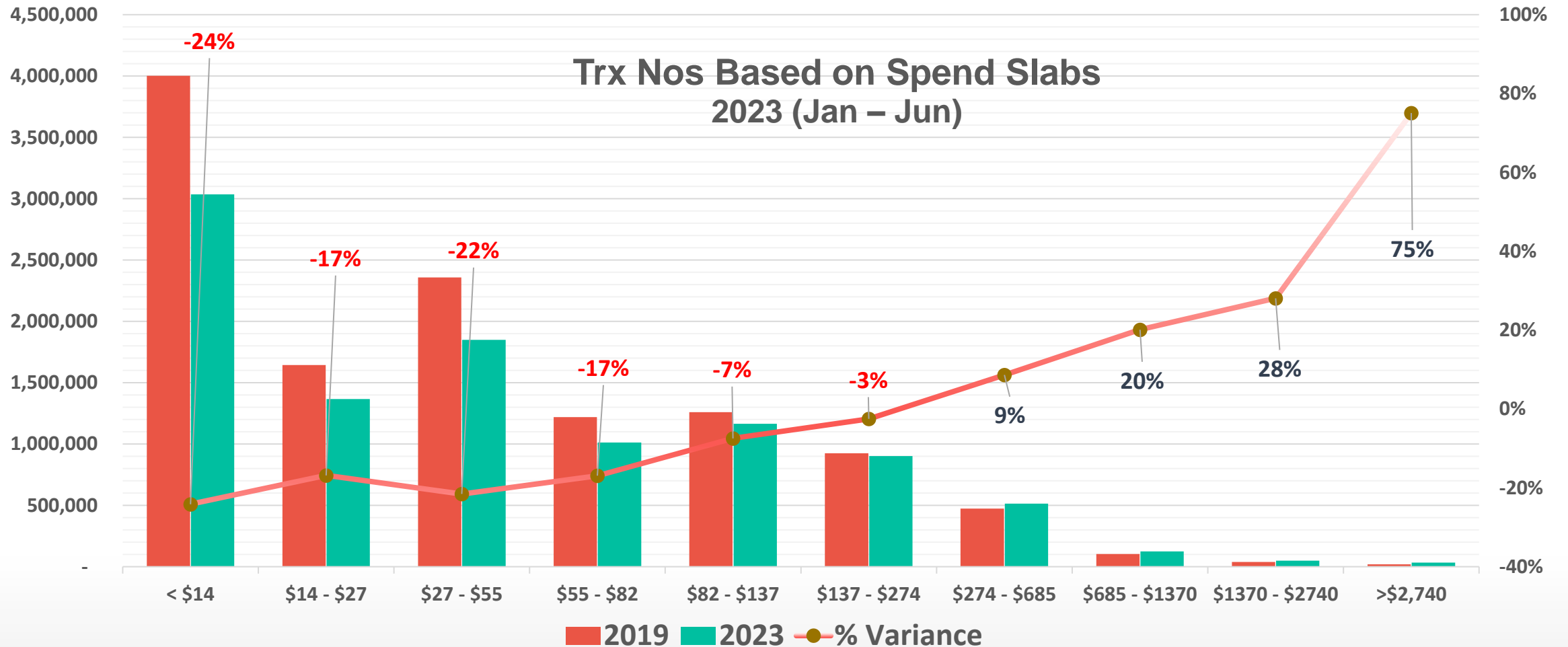


Retail Business – Spend per PAX

2023, 2022, 2021 (Jan – Nov) % To 2019 (baseline)



Retail Business – Spend Slabs 2023 (Jan – Jun)



Combined drop of 19.6% in transactions where spend per transaction is < \$137
 Drop in transaction numbers for spend slab <\$137 is more than overall drop in transaction numbers (20% Vs 17%)
 Transactions with spend <\$137 accounted for 87% of total number of transactions in 2019



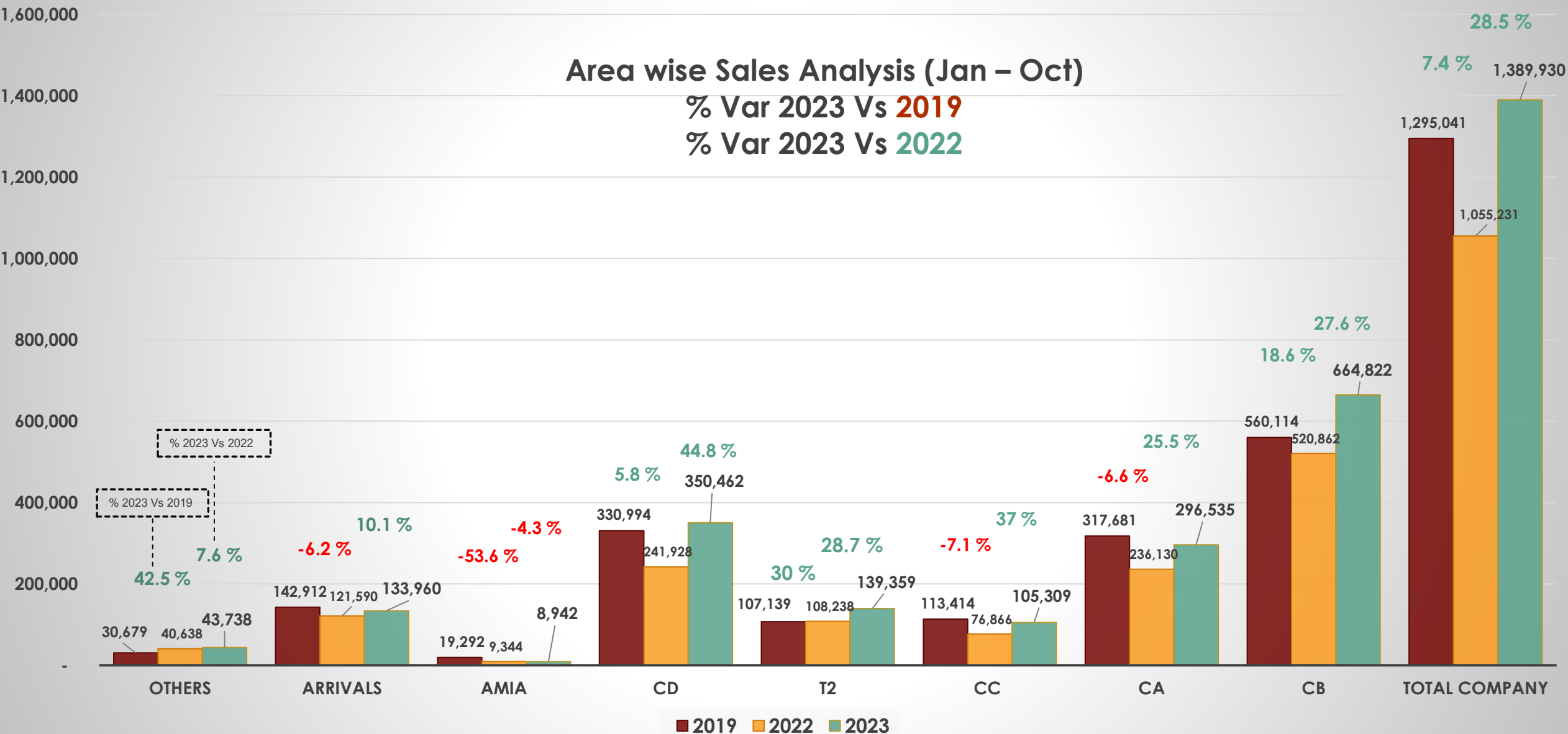
Retail Business – Area Wise Sales

Values in AED

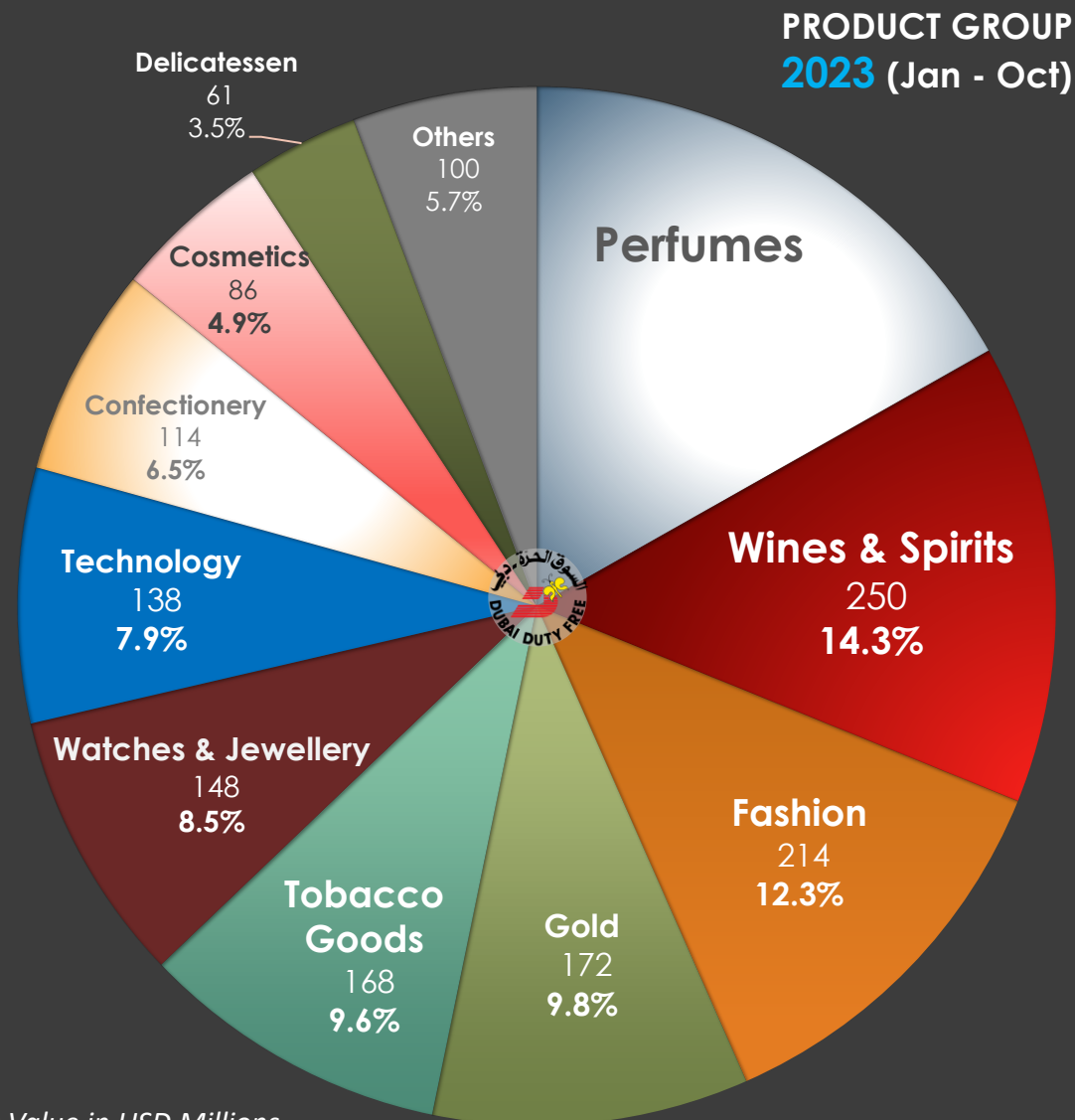
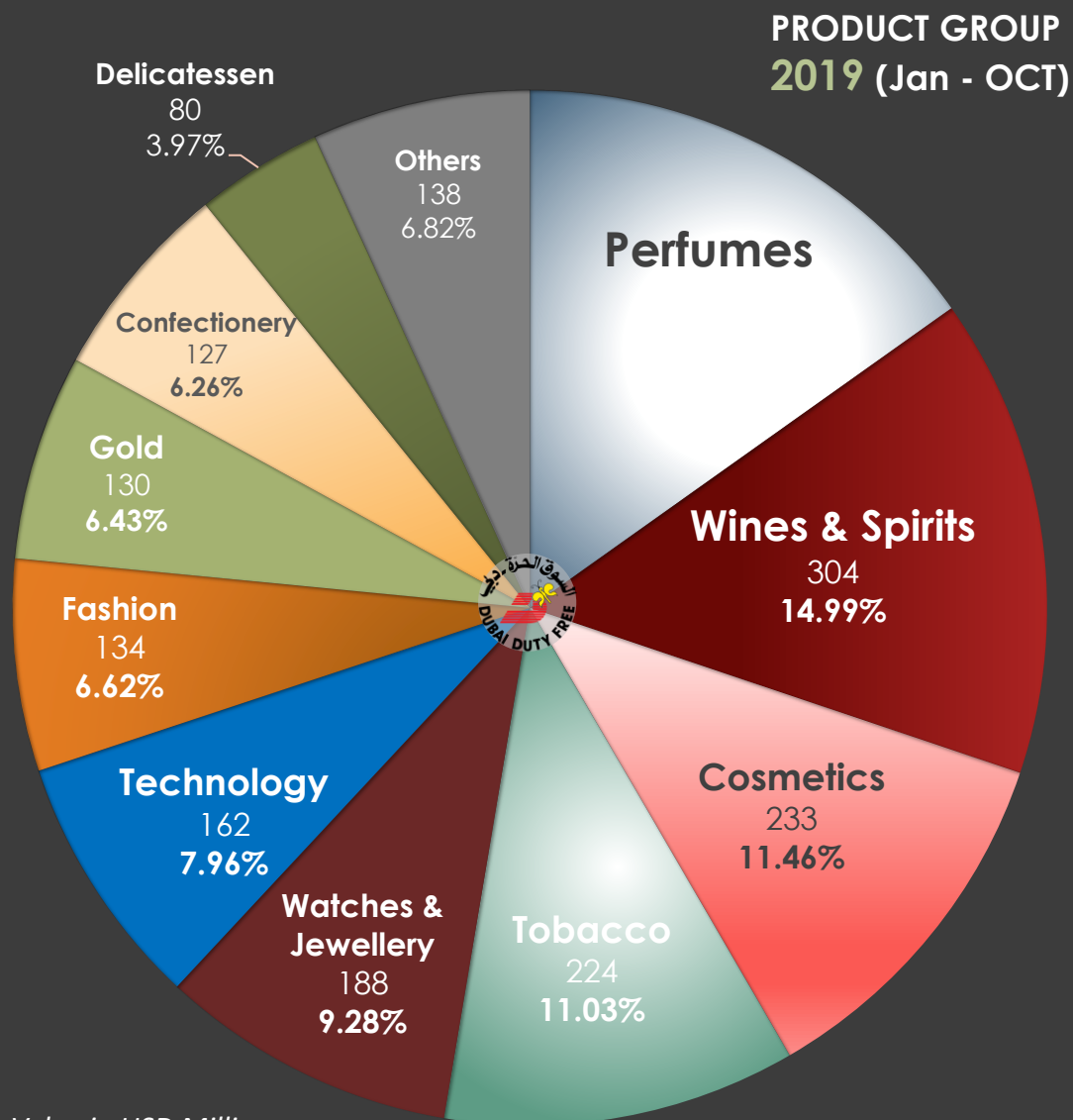
Area wise Sales Analysis (Jan – Oct)

% Var 2023 Vs 2019

% Var 2023 Vs 2022



Product Group Sales 2023 Vs 2019 (Jan – Oct)

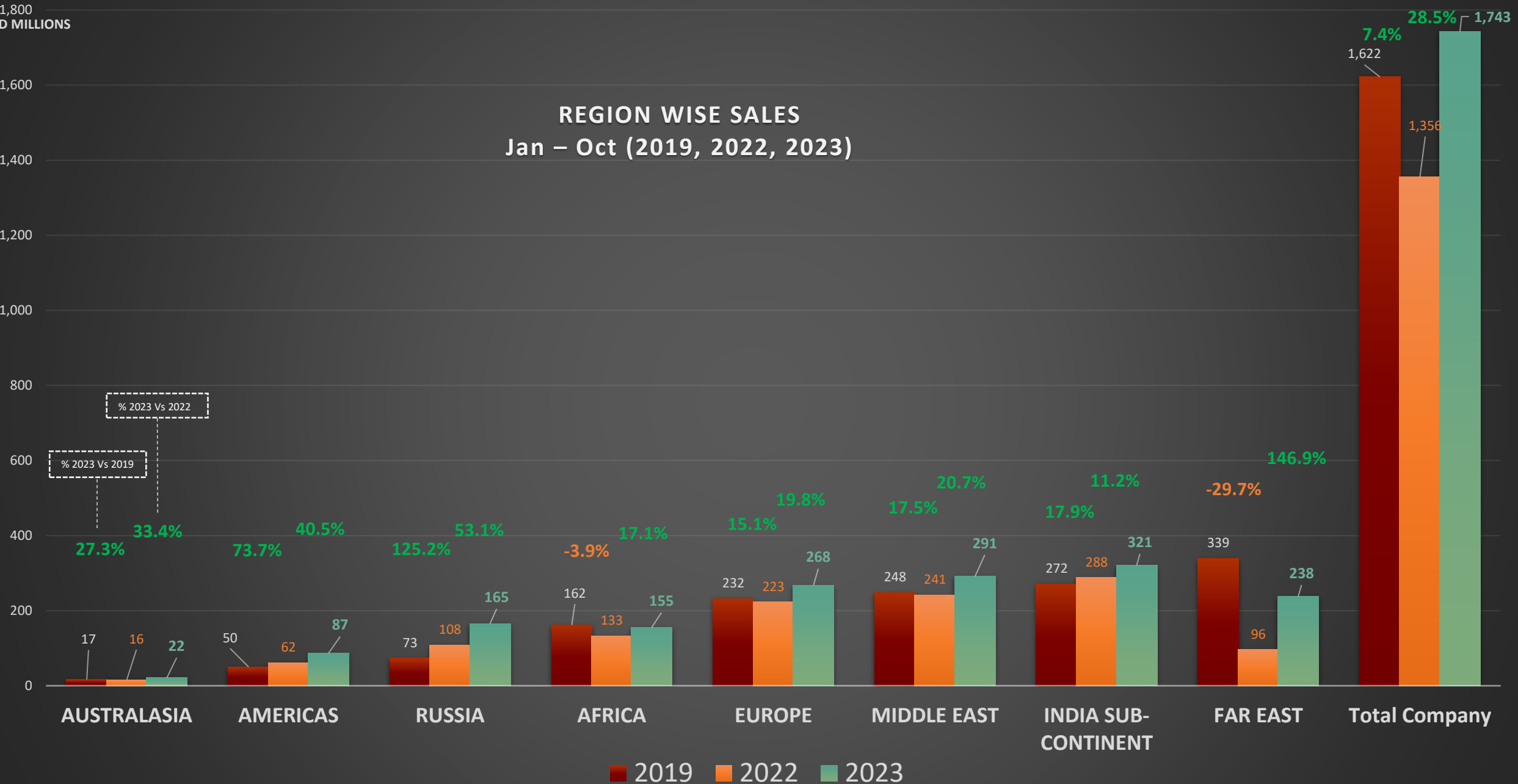




Retail Business – Region Wise | Jan – Oct (2019, 2022, 2023)

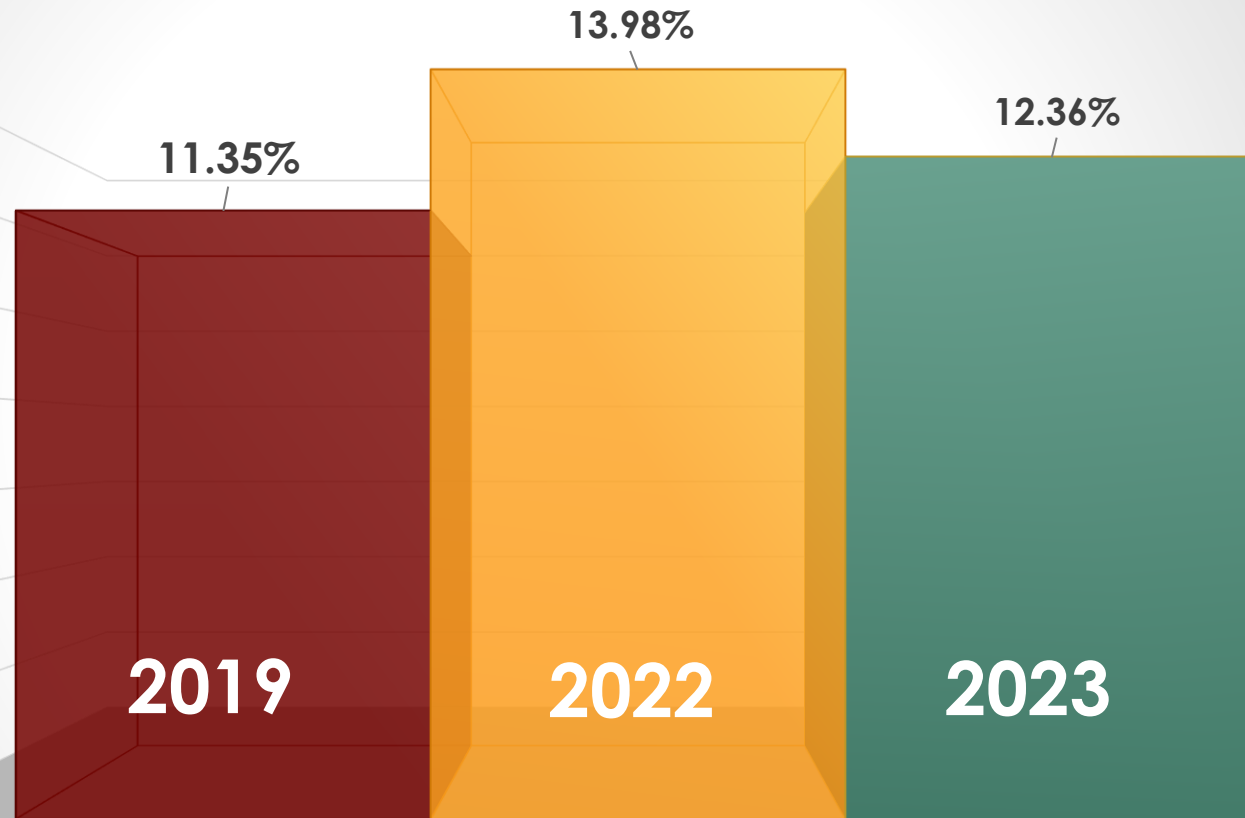
1,800
USD MILLIONS

REGION WISE SALES Jan – Oct (2019, 2022, 2023)



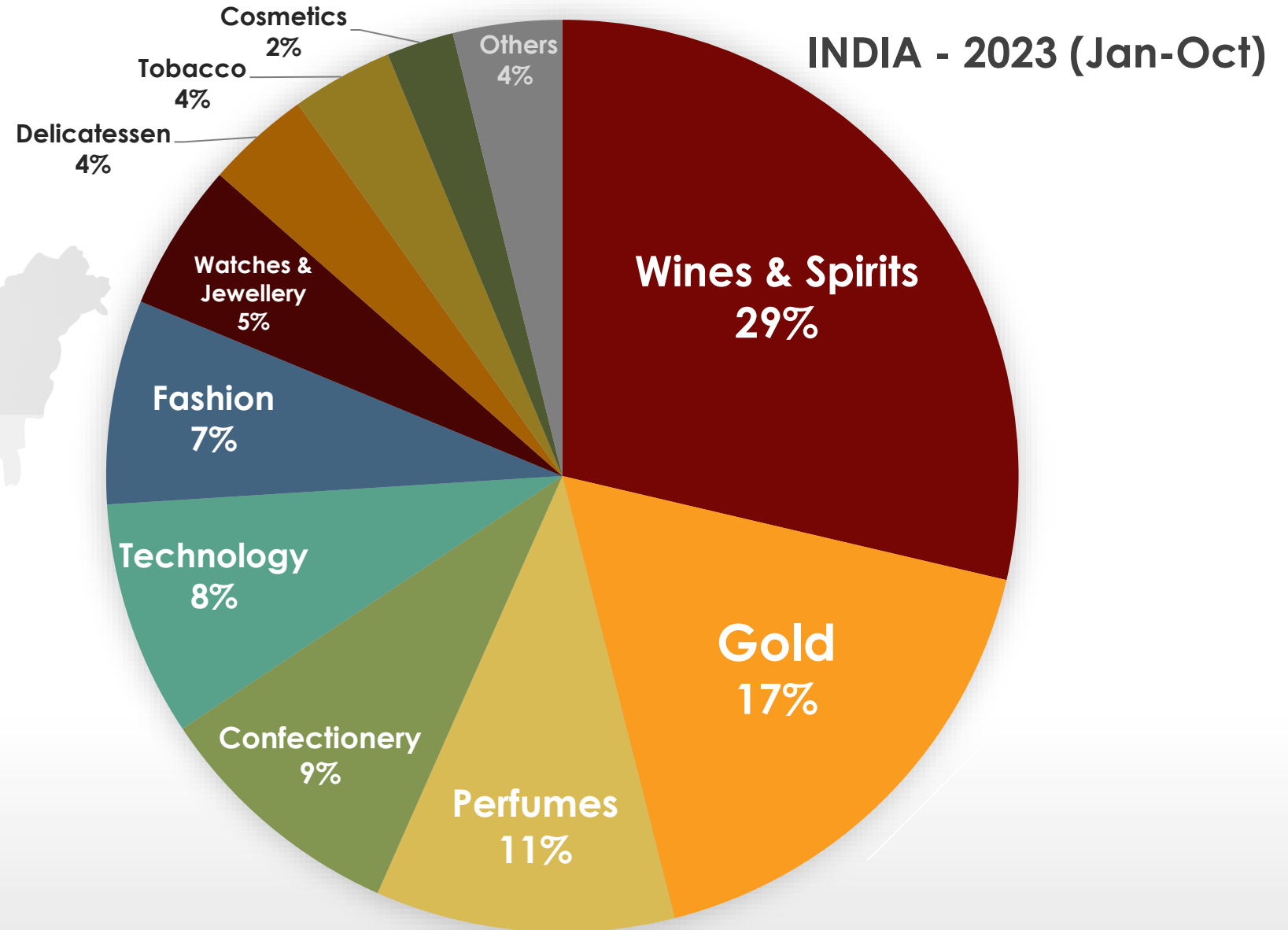
DDF | INDIA PAX- Share – Jan to Oct

INDIA Share to DDF (Jan-Oct) 2023, 2022, 2019

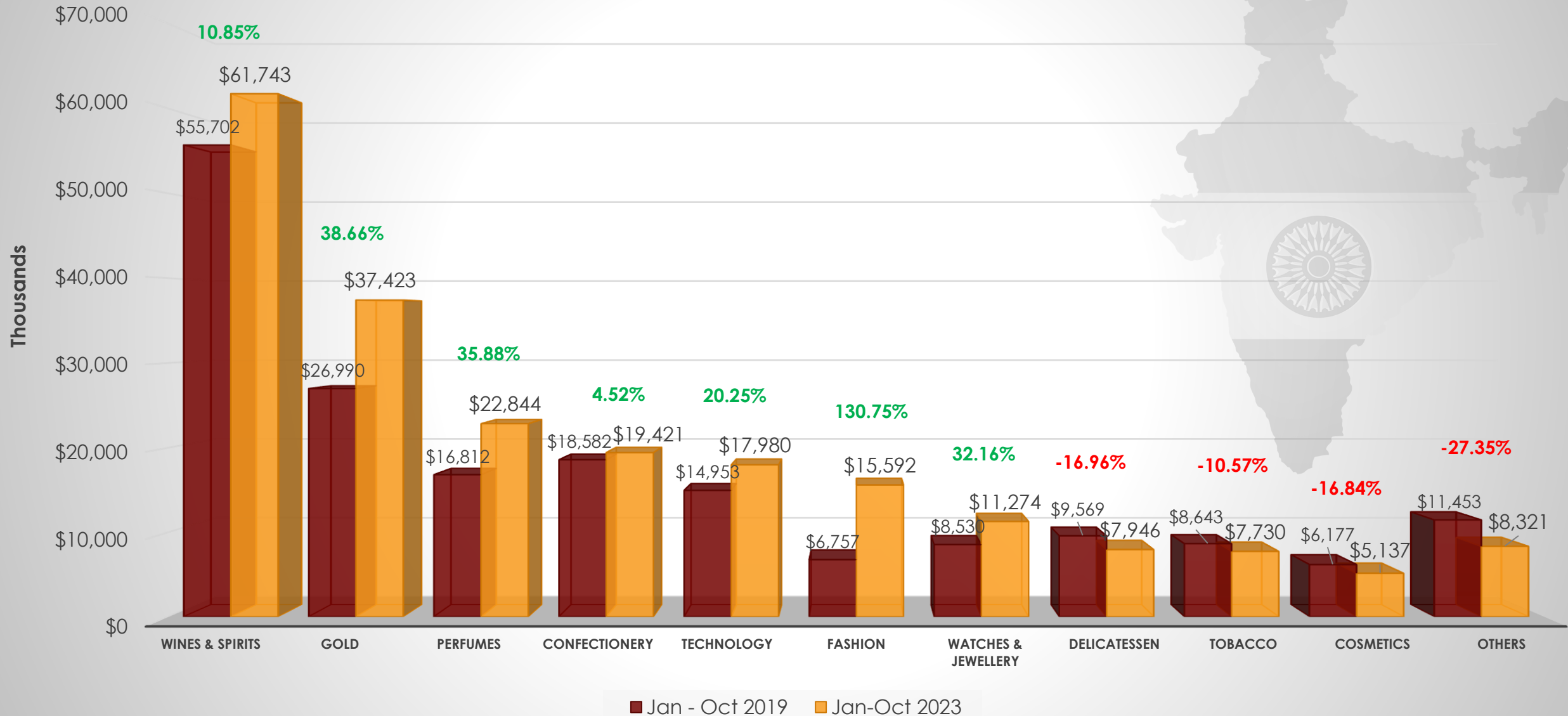


INDIA TO DDF

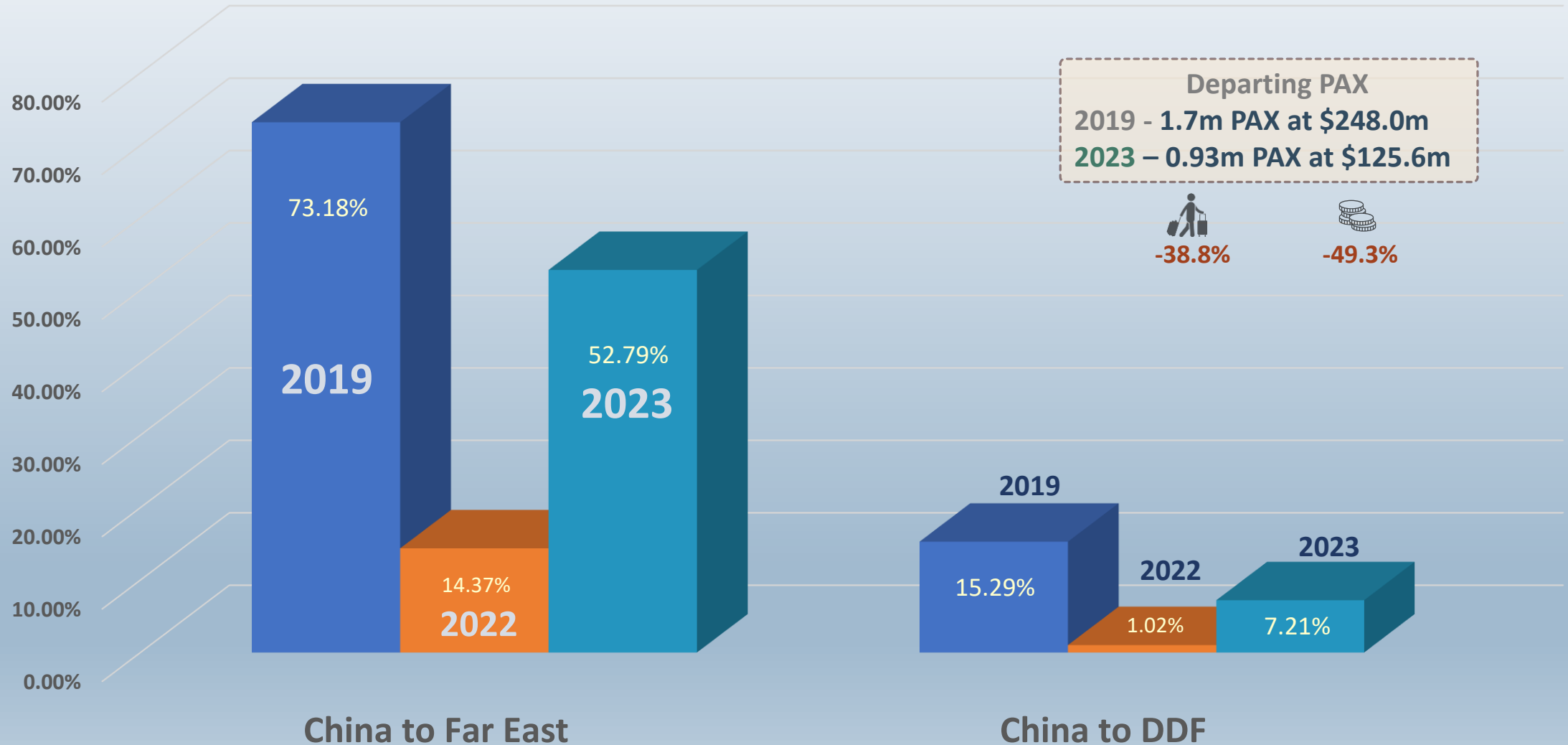
DDF | INDIA PAX- Product group Share – Jan to Oct



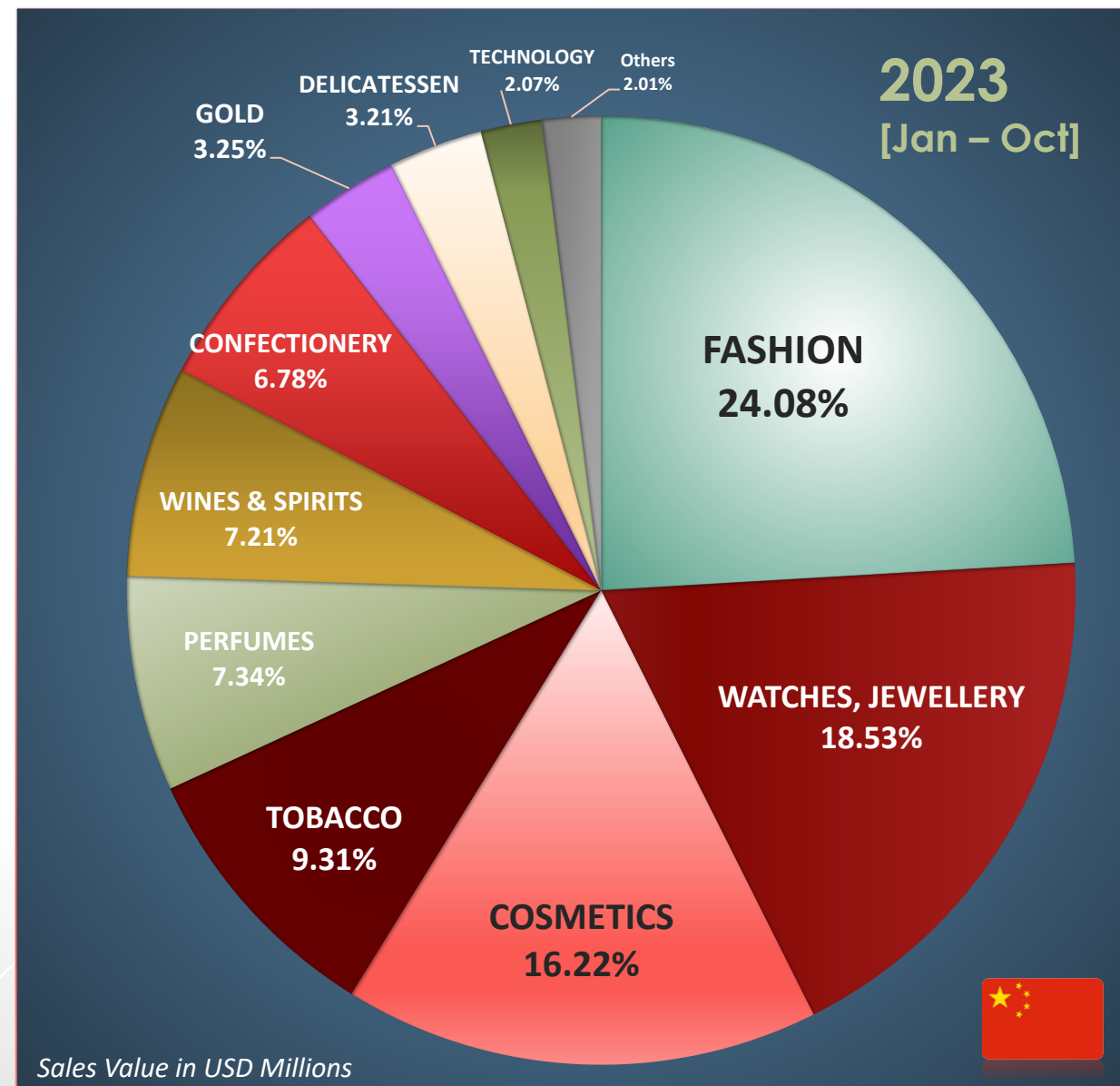
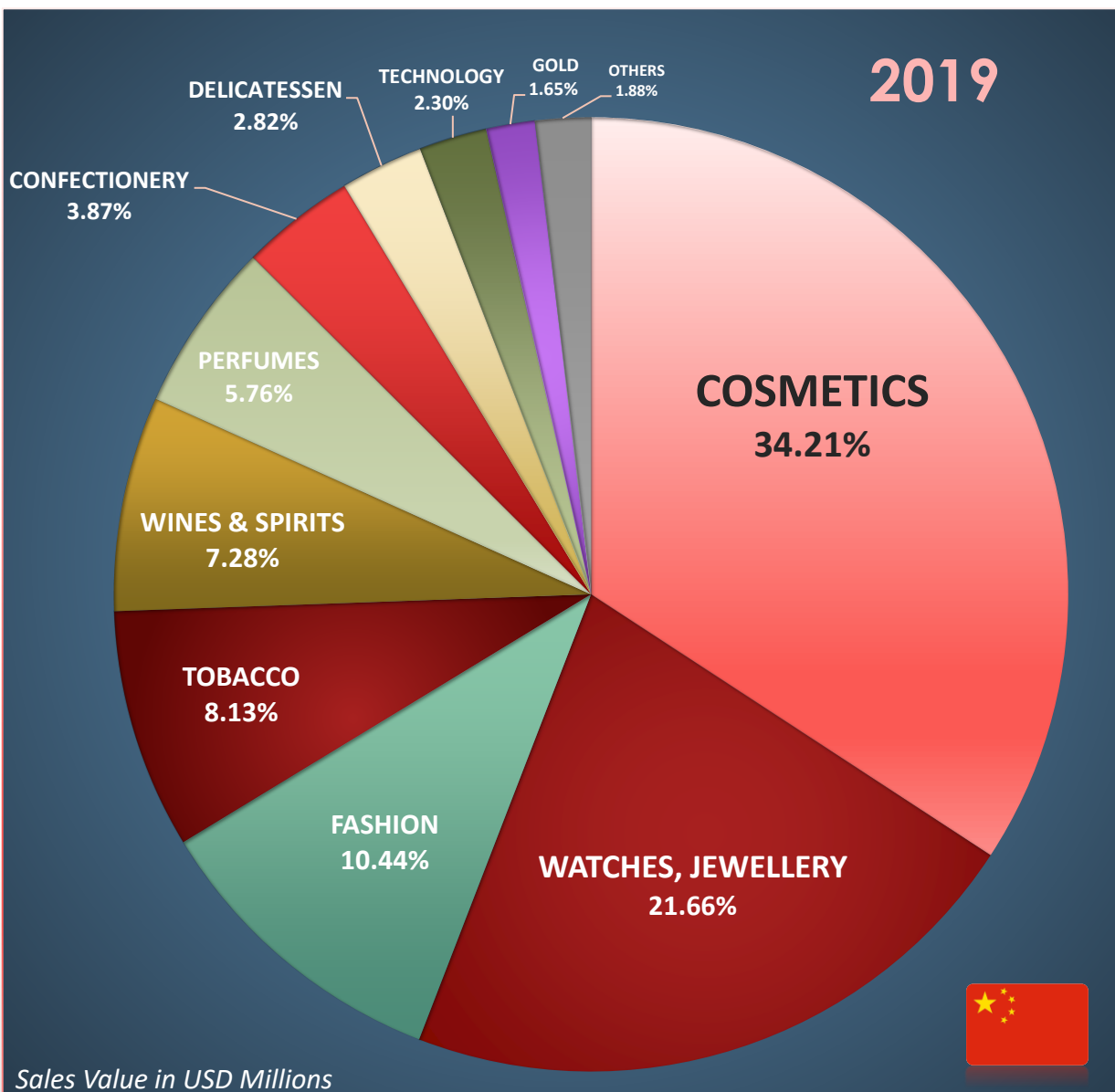
India by Product Category Jan - Oct (2023 Vs 2019)



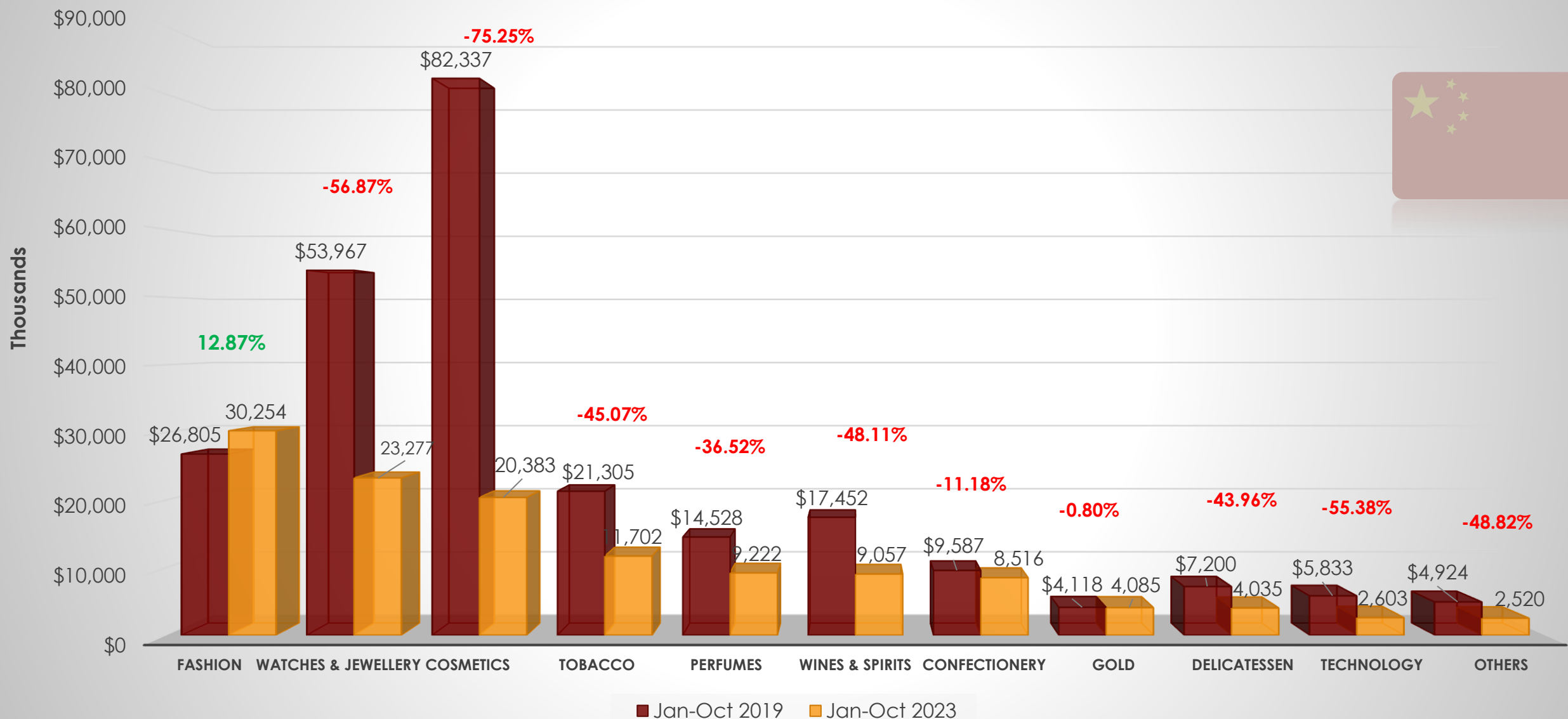
CHINA Share (Jan - Oct)



Product Group – CHINA Category Share 2019, 2023



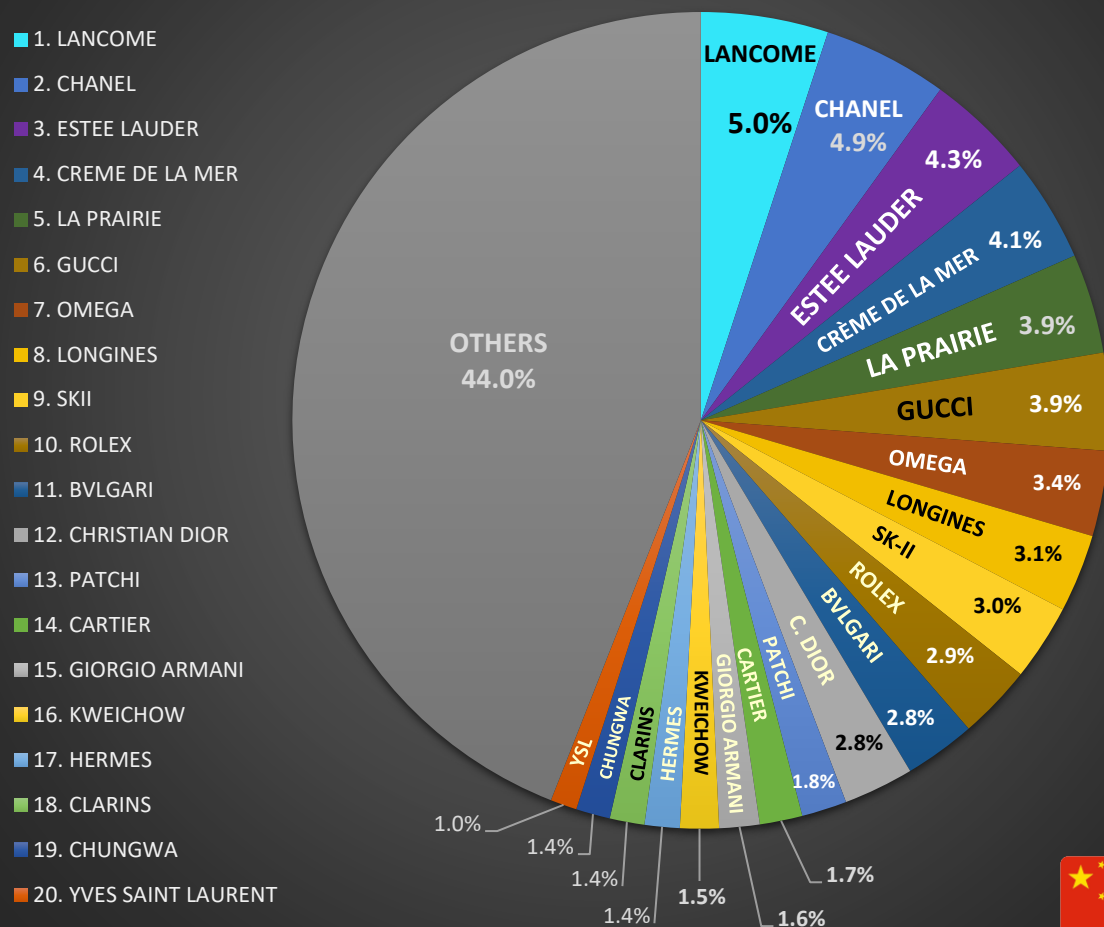
China by Product Category Jan - Oct (2023 Vs 2019)



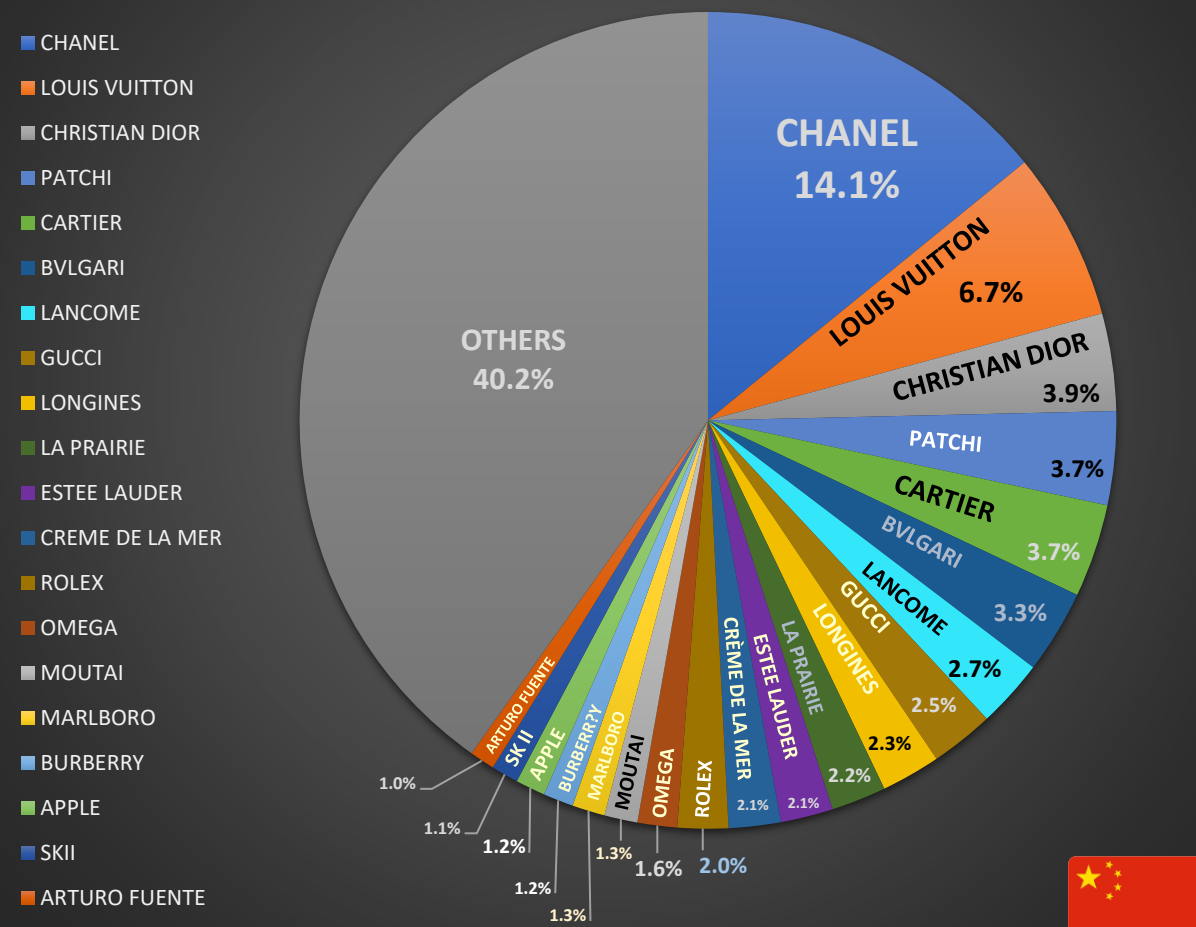
Top 20 Brands – CHINA 2023 Vs 2019

60% China Sales Share from Top 20 Brands [YTD 2023]

CHINA Brand Preference [Jan – Dec] 2019

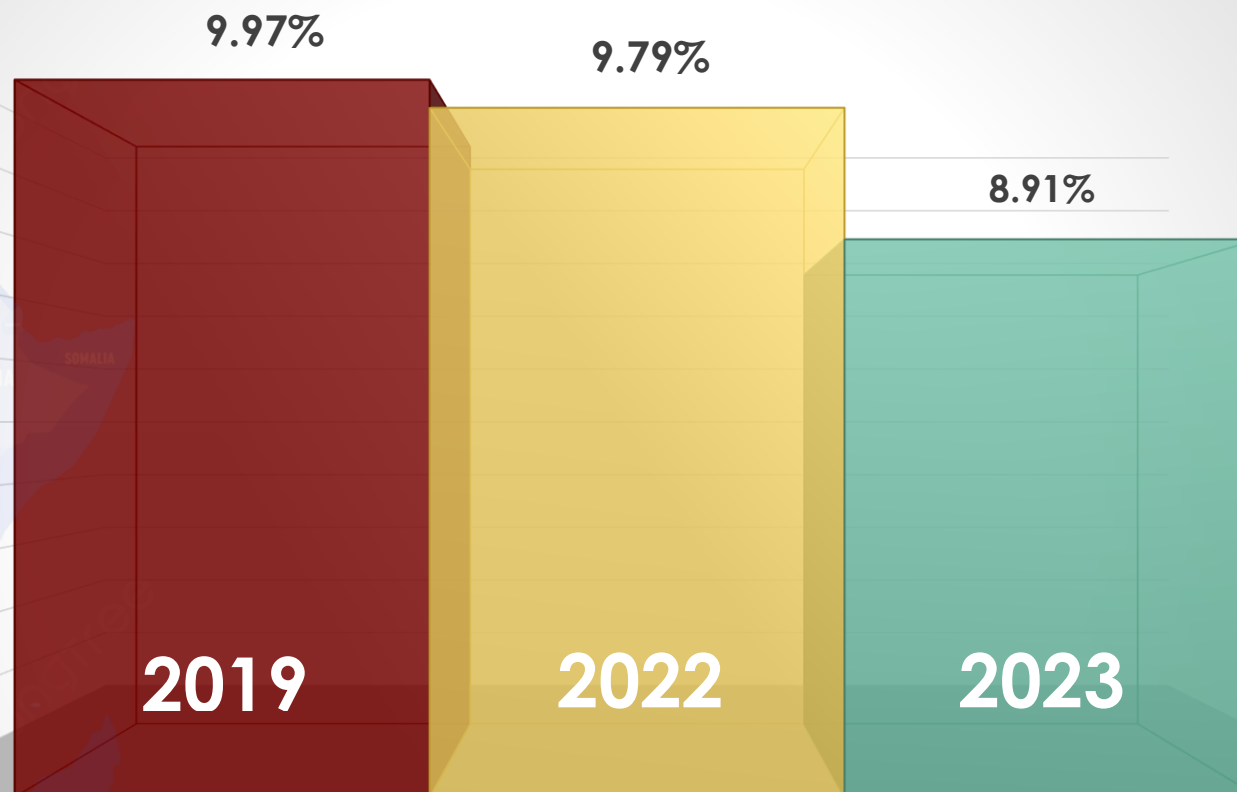


CHINA Brand Preference Jan – Oct, 2023



DDF | AFRICA PAX – Share (Jan – Oct)

AFRICAN Region Share to Total Company (Jan-Oct) 2023, 2022, 2019

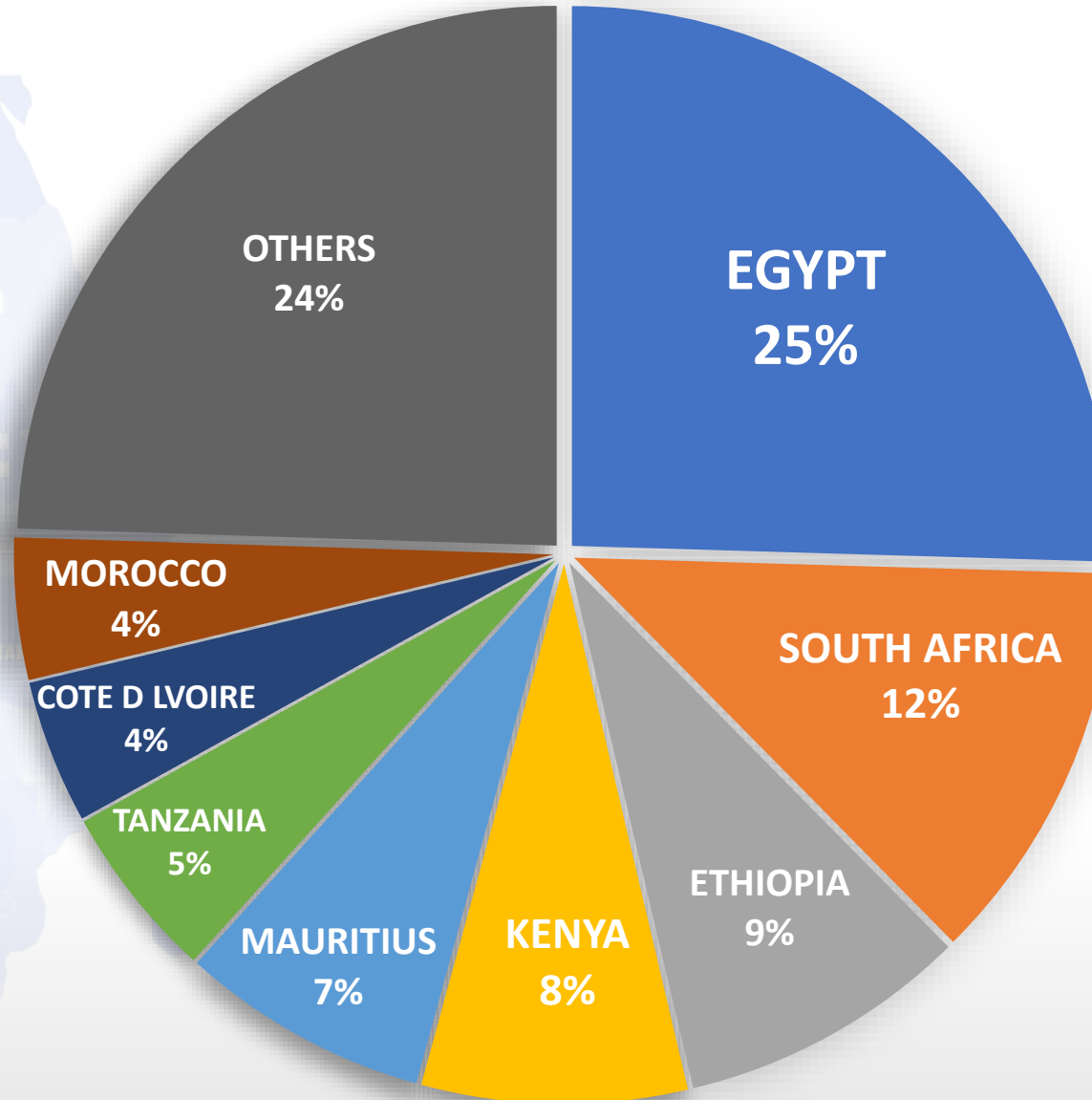


AFRICA TO DDF

Africa Departing PAX is 8.47% of Total Departing PAX in 2023 (Jan – Oct)

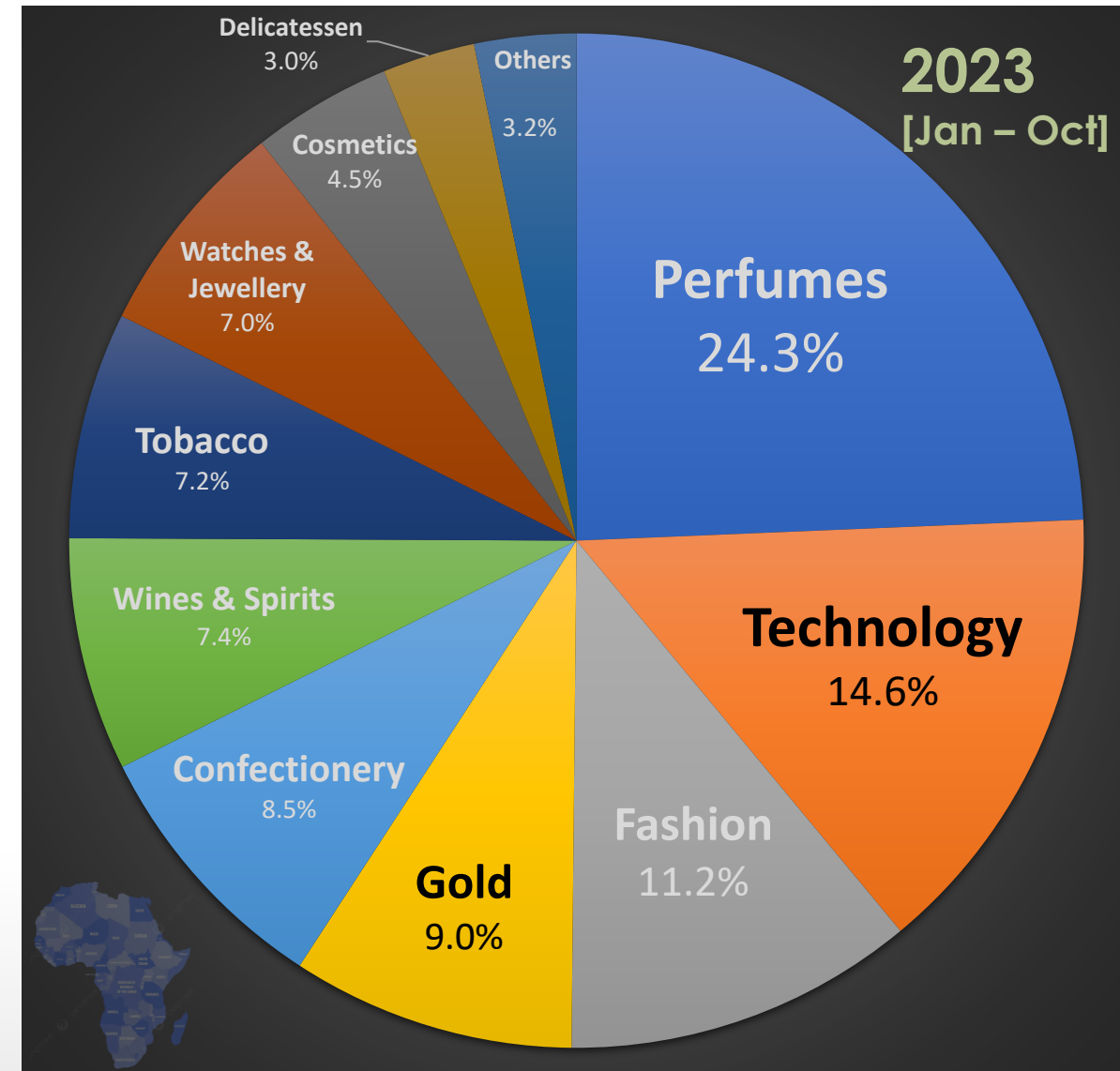
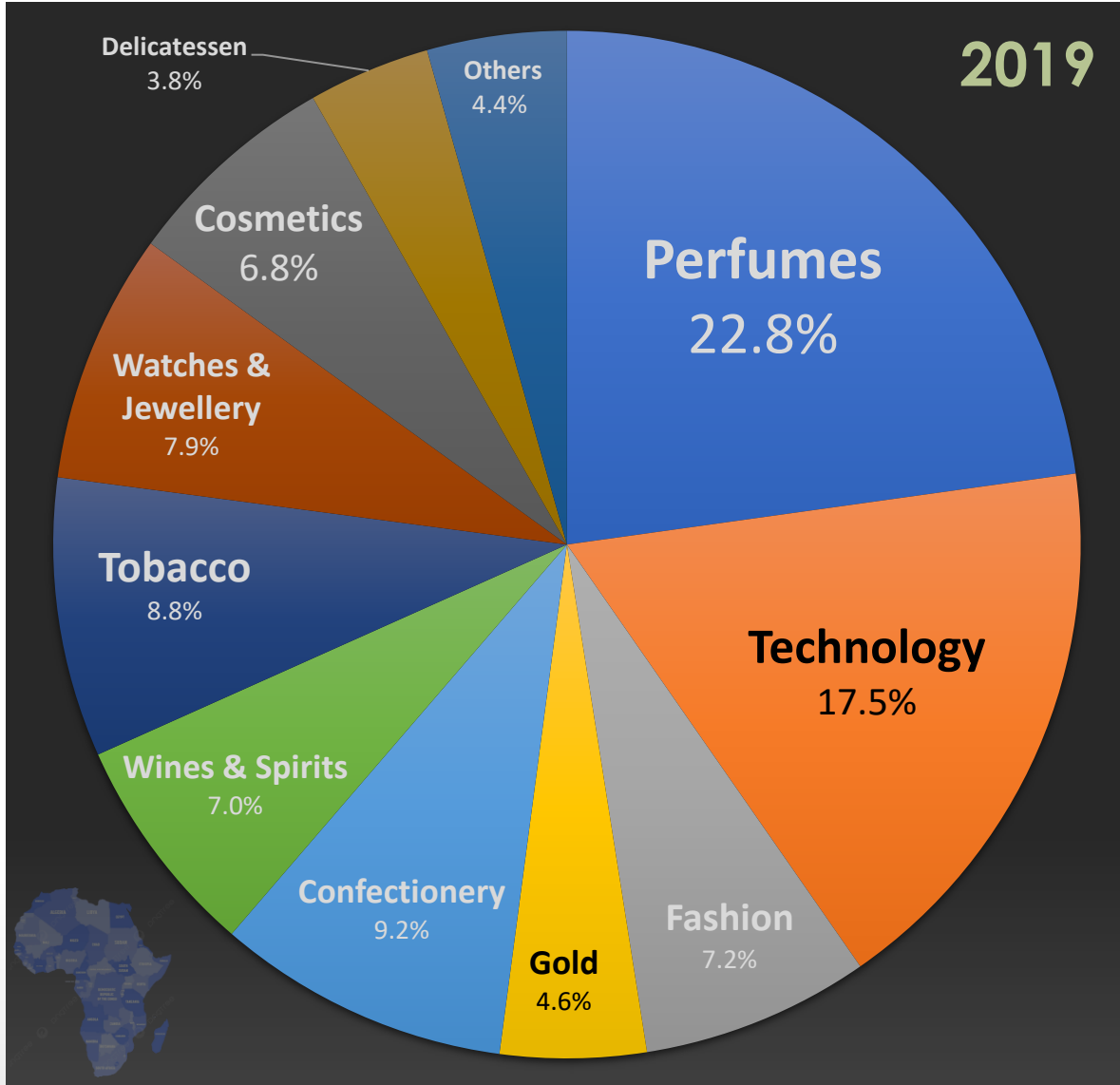
DDF | AFRICA - Share by Country – 2023

AFRICA - Top Contributors to Region Sales (Jan-Oct 2023)

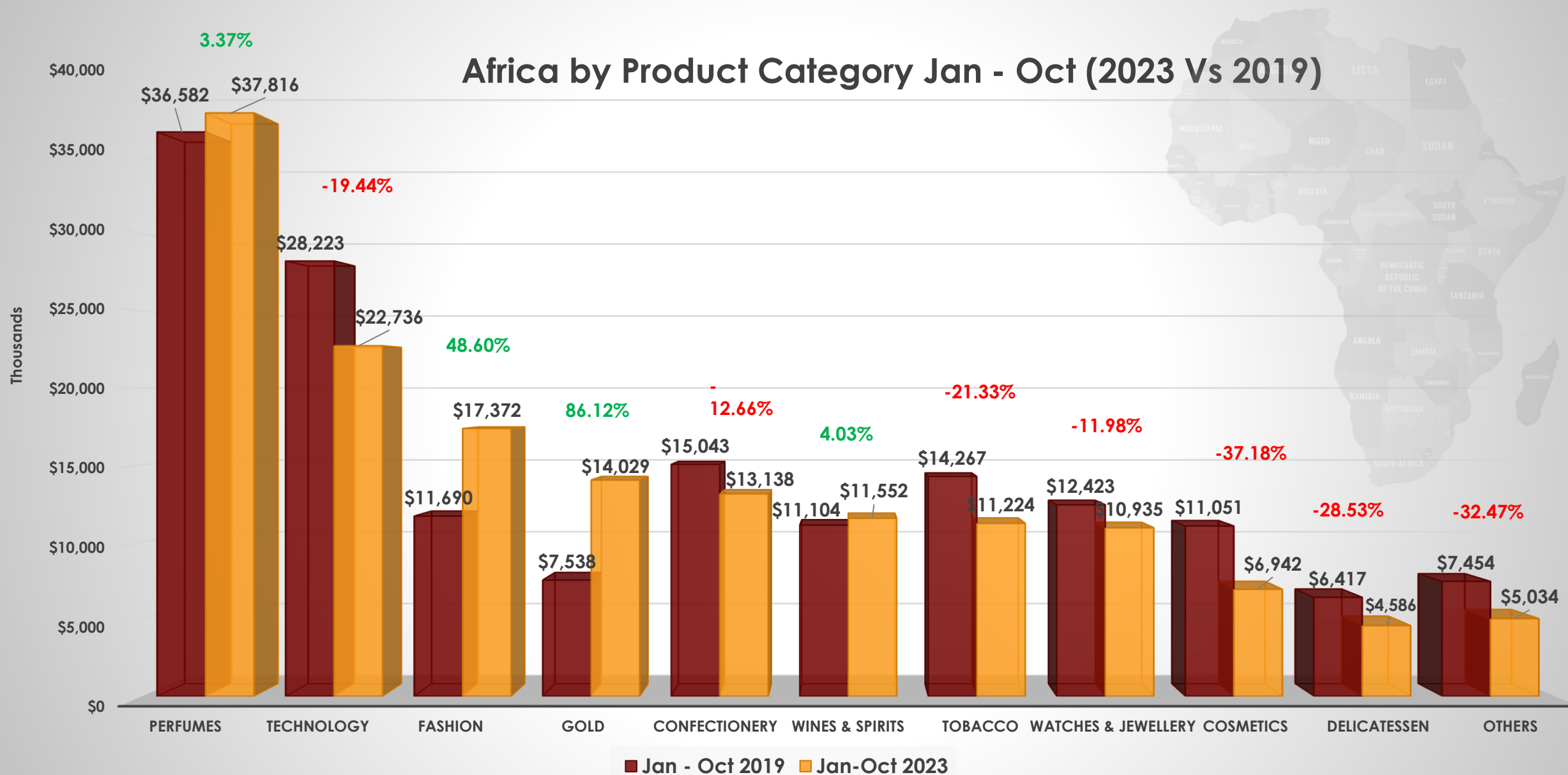


Top 8 from around 25
Countries of Destination
Equalling 76% Share to Region

DDF | AFRICA PAX – Product Share – 2023 (Jan – Oct)



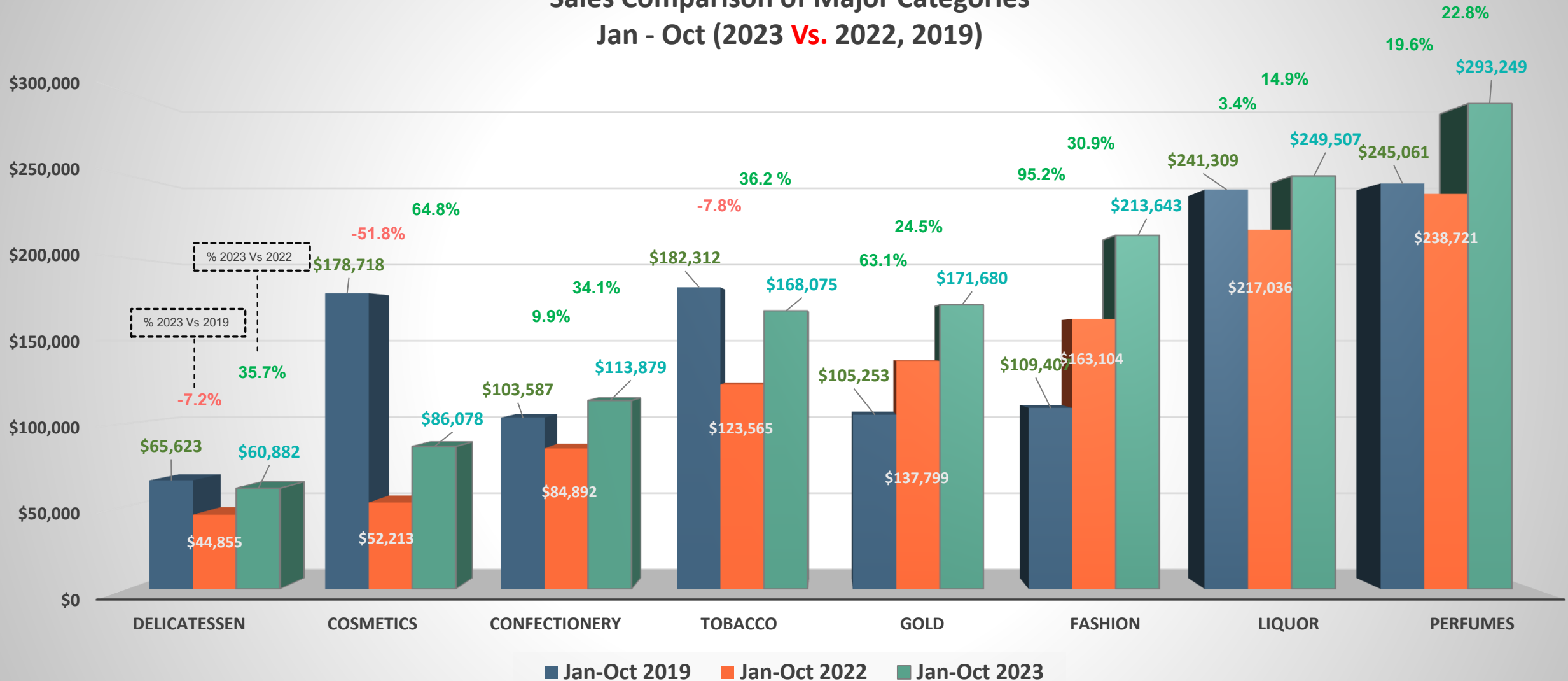
Spend per PAX for 2023 - USD 46.00





DDF – Major Categories Sales | Jan - Oct

Sales Comparison of Major Categories
Jan - Oct (2023 Vs. 2022, 2019)

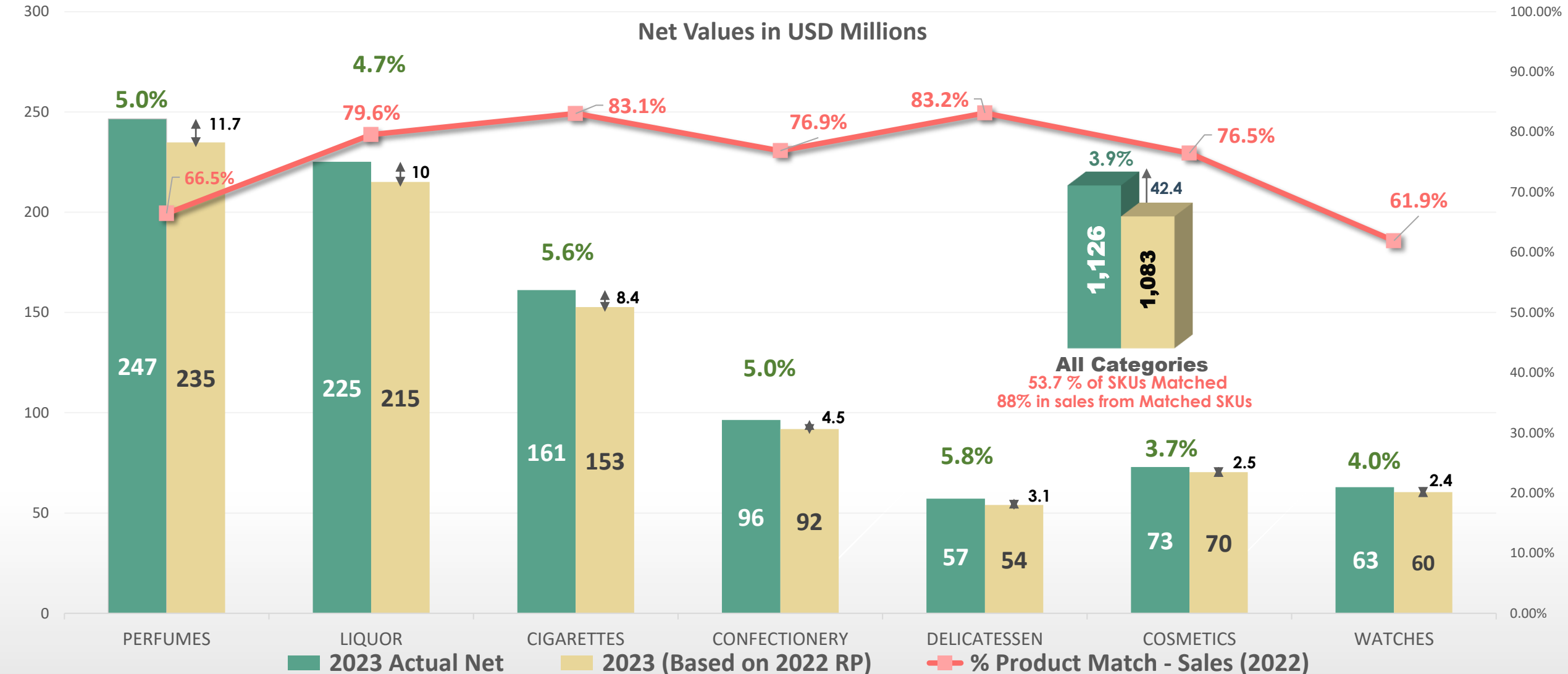




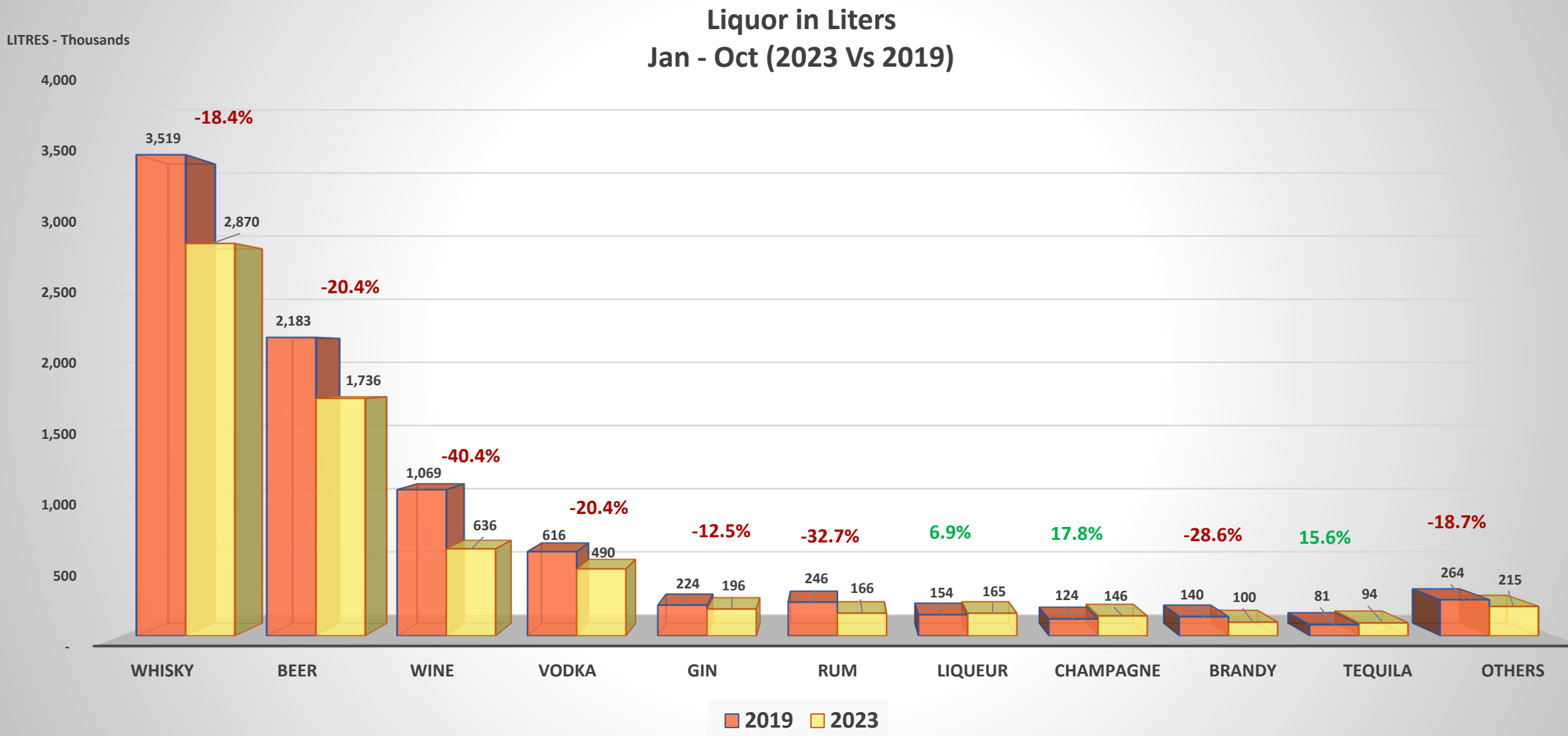
Retail Business - Impact of Price Increases | Jan – Oct

2023 Actuals Vs 2023 based on 2022 Price

USD in Millions

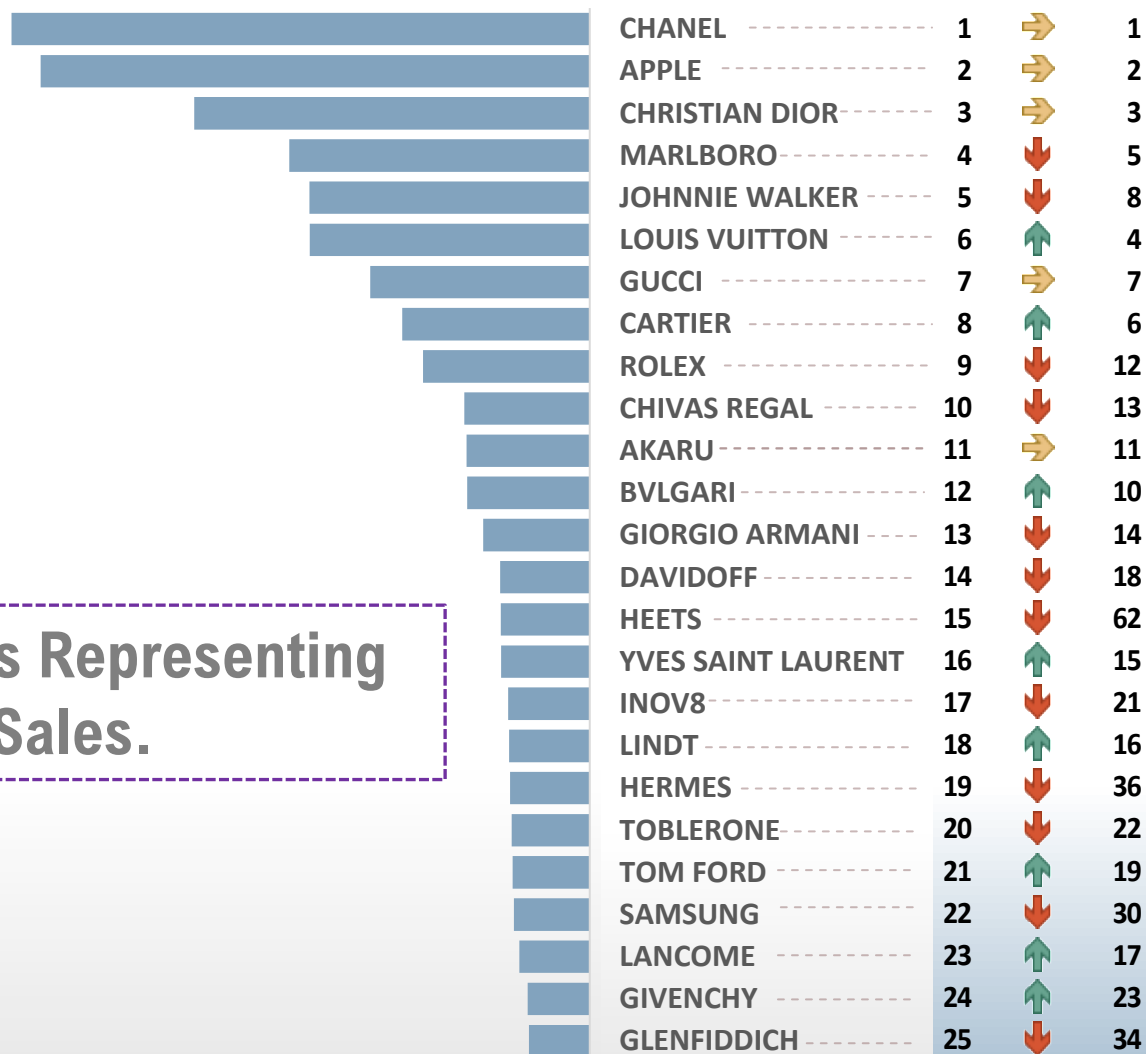


Retail Business | Liquor Sales - by Volume 2023 vs 2019



Retail Business – Brand Positioning 2023

2022 vs 2023

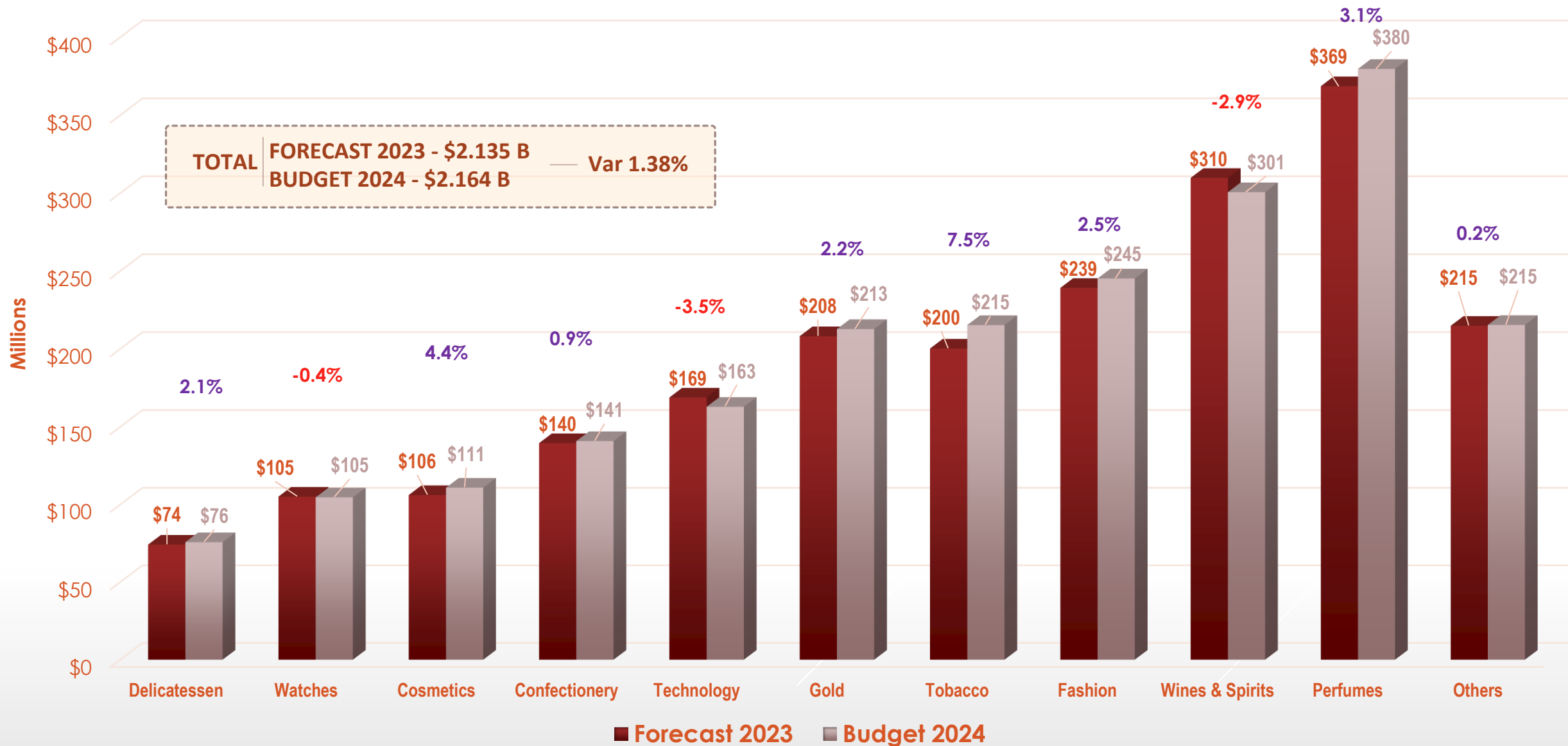


Top 25 Brands Representing
40% of Total Sales.





Retail Business | 2023 Vs 2024 – Forecast





Retail Renovations | Concourse B | Liquor Tobacco U13



Dubai Duty Free

سوق دبي الحرة

SELF CHECKOUT

SPIRITS

ABSOLUT

WINE OF THE MONTH

SHIRAZ

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Concourse B



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Thank You