

# THE AIRPORT CONCESSIONS DATABASE 2024 (SAMPLE)



Airport Insights



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## **INTRODUCTION**

DISCLAIMER

METHDOLOGY

DATA - North America

DATA - Latin America & Caribbean

DATA - Western Europe

DATA - Nordic & Baltic Europe

DATA - Central & Eastern Europe

DATA - Southeast Europe

DATA - Russia/CIS

DATA - Sub-Saharan Africa

DATA - Middle East & North Africa

DATA - South Asia

DATA - Southeast Asia

DATA - East Asia

DATA - Oceania

DATA SOURCES

ABOUT AIRPORT INSIGHTS



## Introduction

The Airport Concessions Database 2024 presents the sales performance of over 150 companies operating duty free, duty free & travel value, duty paid and food & beverage concessions at over 200 airport locations around the world.

This version of The Airport Concessions Database 2024 also includes information on the current ownership of airport duty free, duty free & travel value, duty paid, and food & beverage concessions around the world, as well as their expiry dates (where applicable and available).

The information presented in this report will be useful to retailers and food & beverage operators, airport concessionaires, airport operators, airport investors, airport terminal planners, consultants and other organizations which are interested in the benchmarking and the planning of commercial operations at airports around the world.

In addition, the availability of information on concession expiry dates will be useful to parties looking out and planning for new concession bids.

Our information on the commercial businesses at the various airports and airport groups was collected from various sources in the public domain including government agencies, company registries, news articles, press releases, equity research reports, bond statements, annual reports, and financial statements.

We believe that the information gathered and compiled in this report will provide meaningful and up-to-date intelligence on the global airport commercial business as well as provide support in terms of airport commercial performance benchmarking as well as commercial space planning.

## INTRODUCTION

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## METHDOLOGY

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DATA - Southeast Asia

DATA - East Asia

DATA - Oceania

## DATA SOURCES

## ABOUT AIRPORT INSIGHTS

## Disclaimer

Information in this report has been obtained by desktop research. The information used as well as statements of fact made are not guarantees, warranties or representations as to their completeness or accuracy.

Some information has been triangulated, inferred, and estimated by Airport Insights based on available public data and reasonable assumptions.

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DATA - Southeast Asia

DATA - East Asia

DATA - Oceania

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ABOUT AIRPORT INSIGHTS

## Methodology

Our information on the commercial businesses operating at airports was collected from various sources in the public domain including government agencies, news articles, press releases, equity research reports, bond statements, annual reports, and financial statements.

Some information has been inferred, triangulated, and estimated by Airport Insights based by available data and using reasonable assumptions.

Where possible, data obtained externally has been cross-referenced with that available in our proprietary database to ensure the accuracy of data.

While we have endeavoured to present a reasonable level of consistency and accuracy in terms of our data presentation, readers should take note of the varied sources of our information, which have differences in reporting format, accounting and language used by the source of information.

We have also taken note of restrictions on duty free retailing at airports in countries belonging to the European Union (EU) where information on pure duty free sales is largely unavailable in the public domain. Therefore, in this report, our research for such airports covers the operators of the duty free & travel value business which typically are a retailer managing most of the duty free & travel value businesses.

The currency used for comparison is the US dollar.

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DATA - Southeast Asia

DATA - East Asia

DATA - Oceania

DATA SOURCES

ABOUT AIRPORT INSIGHTS

## Aer Rianta International (North America) Inc.

### Overview

<b>Country/Territory</b>	Canada
<b>Airport Locations</b>	YUL, YHZ, YWG, YQB
<b>Category</b>	Duty Free
<b>Int'l Shareholders</b>	Dufry (Avolta) / Aer Rianta International

### Sales

Reporting Period	Pax (Mil)	Intl Pax (Mil)	Sales (US\$mil)	Space (Sqm)
2015	-	10.5	41.5	-
2016	-	10.9	48.3	-
2017	-	12.2	53.2	-
2018	-	13.3	60.4	-
2019	-	14.2	62.8	-
2020	-	4.8	13.3	-
2021	-	2.7	15.3	-

### Airport IATA Code Reference (s)

Airport Code	Full Name
YUL	Montréal-Pierre Elliott Trudeau International Airport
YHZ	Halifax Stanfield International Airport
YWG	Winnipeg James Armstrong Richardson International Airport
YQB	Québec City Jean Lesage International Airport

## Duty Free Americas, Inc (MIA)

### Overview

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<b>Country/Territory</b>	United States
<b>Airport Locations</b>	MIA
<b>Category</b>	Duty Free
<b>Int'l Shareholders</b>	Duty Free Americas

### Sales

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Reporting Period	Pax (Mil)	Intl Pax (Mil)	Sales (US\$mil)	Space (Sqm)
2017	44.6	20.7	91.1	4,529

### Airport IATA Code Reference (s)

---

Airport Code	Full Name
MIA	Miami International Airport



## Airport Concession Ownership (North America)

<b>Airport</b>	Bermuda Airport
<b>IATA Code</b>	BDA
<b>Category</b>	Food & Beverage
<b>Country/Territory</b>	Bermuda
<b>Region</b>	North America
<b>Current Operator (s)</b>	Bermuda Travel Concessions
<b>International Shareholders/Partners</b>	SSP
<b>Expected Concession Expiry Year</b>	n/a
<b>Remarks</b>	On 31 October 2019, Skyport announced that it had awarded the food and beverage concession in the new Bermuda Airport passenger terminal. Bermuda Travel Concessions is a joint venture with airport food and beverage giants SSP America. The organisation will operate three restaurants and a market-style convenience store in the airport terminal.
<b>Airport</b>	Montréal–Trudeau International Airport
<b>IATA Code</b>	YUL
<b>Category</b>	Duty Free
<b>Country/Territory</b>	Canada
<b>Region</b>	North America
<b>Current Operator (s)</b>	Aer Rianta International (North America) Inc.
<b>International Shareholders/Partners</b>	Aer Rianta International
<b>Expected Concession Expiry Year</b>	n/a
<b>Remarks</b>	Aer Rianta International (North America) Inc. is a wholly owned subsidiary of ARI in Canada that has operated in four airports since 1998, including Montréal-Pierre Elliott Trudeau International Airport.
<b>Airport</b>	Edmonton International Airport
<b>IATA Code</b>	YEG
<b>Category</b>	Duty Free/Duty Paid/Food & Beverage
<b>Country/Territory</b>	Canada
<b>Region</b>	North America
<b>Current Operator (s)</b>	ARI- Marshall Retail Group Partnership
<b>International Shareholders/Partners</b>	Aer Rianta International
<b>Expected Concession Expiry Year</b>	n/a
<b>Remarks</b>	In December 2023, ARI announced the expansion of its North American operations with the launch of a new store at Edmonton International Airport, Canada. ARI will be operating duty free concessions in partnership with Marshall Retail Group, which will be operating other concessions within the airport, outside of duty free. The new store venture will see ARI operate in the Liquor, Tobacco, Perfume, Cosmetics, Confectionery, Sunglasses, Jewellery, Handbags and Souvenirs Duty Free categories, in two retail spaces of 170 square meters and a further 190-square-meter transborder store.
<b>Airport</b>	Macdonald–Cartier International Airport
<b>IATA Code</b>	YOW
<b>Category</b>	Duty Free
<b>Country/Territory</b>	Canada
<b>Region</b>	North America
<b>Current Operator (s)</b>	DFASS Canada Company
<b>International Shareholders/Partners</b>	3Sixty

## Data Sources

Source	Url
A New JFK Airport Website	anewjfk.com
Abu Dhabi Airport Company	adac.ae
Abu Dhabi Duty Free	addf.ae
ACI North America	www.airportscouncil.org
Airports Company South Africa	airports.co.za
Acuité Ratings & Research	acuite.in
AENA Northeast Brazil Airports Website	aenabrasil.com.br
Aer Rianta International	ari.ie
Aéroport de Paris	parisaeroport.fr
Aeroporti di Roma	adr.it/fiumicino
Air Transport World	aviationweek.com
Airport Authority of India	aai.aero
Airport Business	airport-business.com
Airport Suppliers	airport-suppliers.com
Airport Technology	airport-technology.com
Airports Corporation of Vietnam	vietnamairport.vn
Airports of Mauritius	airportsmauritius.aero
Airports of Thailand	airportthai.co.th
ANA Portugal Website	ana.pt
Angkasa Pura 1	ap1.co.id
ASUR Airports	asur.com.mx
ASUTIL	asutil.org
Atlanta Journal Constitution	ajc.com
Auckland Airport	aucklandairport.co.nz
Auditor General's Office Maldives	audit.gov.mv
Austrian Retail Association / Handelsverband	handelsverband.at
Avalon Research	avalonglobalresearch.com
Avinor	avinor.no
Bahrain Duty Free Shop Complex	bdfs.bh
Bangkok Post	bangkokpost.com
Beijing Capital International Airport	bcia.com.cn
biobiochile.cl	biobiochile.cl
Bolsa Latinoamericana de Valores	latinexbolsa.com
Brussels Airport	brusselsairport.be
Bureau of Infrastructure and Transport Research Economics	bitre.gov.au
Business Magazin	businessmagazin.ro
Civil Aviation Authority UK	caa.co.uk
Civil Aviation Authority Uganda	caa.go.ug
caifuhao.eastmoney.com	caifuhao.eastmoney.com
Calameo Mag	en.calameo.com/
Caribbean Airways	caribbean-airlines.com
Charlotte Business Journal	bizjournals.com
China Duty Free Group	cdfg.com.cn
China Travel News	chinatravelnews.com
Chubu Centrair Airport	centrair.jp
City of Atlanta Department of Aviation	atlantaga.gov/government/departments/aviation
Civil Aviation Administration of China	caac.gov.cn
Clark International Airport	clarkinternationalairport.com
Clicanoo	clicanoo.re
Commission of Audit, Philippines	coa.gov.ph
Companies House UK	gov.uk/government/organisations/companies-house

## The Airport Concessions Database 2024 (Sample)

Comptroller and Auditor General of India	cag.gov.in
Contactonews.co	contactonews.co
Copenhagen Airports	cph.dk
Corporacion America	investors.corporacionamericaairports.com
Cronica Global	cronicaglobal.elespanol.com
Czech Republic Ministry of Justice Company Registry	or.justice.cz
Daily News Egypt	dailynewsegypt.com
DBS Vickers Securities	dbsvitrade.com
Denver Airport Website	flydenver.com
Department of Transport Hawaii	hidot.hawaii.gov
DFNI Online	dfnionline.com
DFW Airport Website	dfwairport.com
DGAC Costa Rica	dgac.go.cr
DGCA Lebanon	dgca.gov.lb
Moscow Domodedovo Airport	dme.ru
Dublin Airport	dublinairport.com
DWU Consulting	dwuconsulting.com
Dubrovnik Airport	airport-dubrovnik.hr
Dufry Website	dufry.com
Dunedin Airport	dunedinairport.co.nz
Egyptair	egyptair.com
Ekos Negocios	ekosnegocios.com
El Pais	elpais.com
eturbonews	eturbonews.com
Femuqui Invesmtent	femuqui.com
Firmas.lv	Firmas.lv
Food Services.de	food-service.de
FORA	fora.ie
Fraport	fraport.com
Free Malaysia Today	freemalaysiatoday.com
Fukuoka Airport	fukuoka-airport.jp
GACA	gace.gov.sa
Grupo Aeroportuario del Pacífico	aeropuertosgap.com.mx
Gazipaşa Manşet Gazetesi	gazipasamanset.com
Gateway Los Angeles	gatewayla.org
Geneva Airport	gva.ch
GMR Group	gmrgroup.in
Government of Argentina Infobase	hcdn.gov.ar
Guangxi Tourism Development Group	gxtgd.com/
guangzhoutiao.com	guangzhoutiao.com
Guosen Securities	guosen.com.hk
Haikou Meilan Airport Company Annual Report	mlairport.com
Hannover Airport	hannover-airport.de
Hareetz	haaretz.com
Hellenic Duty Free Shops	athens.shopdutyfree.com
Helsinki Duty Free	helsinki.shopdutyfree.com
Hiroshima Airport	hiap.co.jp/
Hoeffinger Solutions	hoeffingersolutions.com
Hotel Shilla Annual Report	shilla.net
Huacheng Securities	wt.hczq.com
IBISWorld	ibisworld.com
ICAO	icao.int
IMAS Costa Rica	imas.go.cr
Incheon Airport Corporation	airport.kr
Indianapolis Airport Authority	ind.com
ICRA Limited	icra.in
Iraq Duty Free Website	iraqdutyfree.com
Isavia	isavia.is

## The Airport Concessions Database 2024 (Sample)

Jamaica Stock Exchange	jamstockex.com
JC Decaux	jcdecaux.com
Kansai Airports	kansai-airports.co.jp
Kochi Airport	kochiap.co.jp
Korean Association of International Studies	kaisnet.or.kr
Lagardère Travel Retail Website	lagardere-tr.com
Largest Companies	largestcompanies.com/
Le Figaro Entreprises	entreprises.lefigaro.fr
L'Echo	lecho.be
L'Economiste	leconomiste.com
Lider Media	lider.media
Lietuvos nacionalinis radijas ir televizija	lrt.lt
Lithuanian Companies Directory	Rekvizitai.lt
Los Angeles World Airports	lawa.org
Macau Airport	camacau.com/en
Mactan-Cebu International Airport	mactancebuairport.com
MAHB Website	malaysiaairports.com.my
Marketplace Development	marketplacedevelopment.com
Matsuyama Airport	matsuyama-airport.co.jp
Metropolitan Washington Airports Authority	mwa.com
Miami International Airport	miami-airport.com
Miami Today	miamitodaynews.com
Minneapolis St Paul International Airport	metroairports.granicus.com
Ministry of Foreign Affairs, Republic of Korea	overseas.mofa.go.k
minhangshi.com	minhangshi.com
Mt. Fuji Shizuoka Airport	mtfuji-shizuokaairport.jp
Mulhouse Airport	euroairport.com
Munich Airport	munich-airport.com
Narita International Airport	naa.jp
National Bureau of Statistics Maldives	statisticsmaldives.gov.mv
New Straits Times	nst.com.my
New Zealand Companies Register	companies-register.companiesoffice.govt.nz/
Namibia Airports Company	airports.com.na
Namibian	namibian.com.na
Newrest ASL	newrest.eu
Next Brand	nextbrand.com.vn
Nikkei	nikkei.com
Northdata Smart Research	northdata.com
Ositran (Peru)	ositran.gob.pe/anterior/
Passenger Terminal Today	passengerterminaltoday.com
Port Authority of New York and New Jersey	panynj.gov
Port of Oakland	portofoakland.com
PPP Office, Philippines	ppp.gov.ph
Prague Airport Annual Report	prg.aero
Prensa Economica	prensaeconomica.com.ar
Pulkovo Airport	pulkovoairport.ru
Pulse Korea	pulsenews.co.kr
PW Consulting Agency	pwconsulting.com
Queenstown Airport	queenstownairport.co.nz
Quito International Airport 2019 Activity Report	LINK
Report Aziende	reportaziende.it
Retail in Asia	retailinasia.com
Reuters	reuters.com
Romania Insider	romania-insider.com
Routes Online	routesonline.com
San Diego International Airport	san.org
San Francisco International Airport	flysfo.com
San Jose International Airport Website	flysanjose.com

## The Airport Concessions Database 2024 (Sample)

Sangster International Airport Official Website	mbjairport.com
Sankei Shimbin	sankei.com
SASCO	sasco.com.vn
Saudi Catering	saudicatering.com
SBIS	sbis.ru
SBVC - Sociedade Brasileira de Varejo e Consumo	sbvc.com.br
Schiphol Airport	schiphol.nl
Superintendencia de Sociedades (Colombia)	supersociedades.gov.co
Seattle Tacoma Airport	portseattle.org/sea-tac
Securities and Exchange Board of India	sebi.gov.in
Select Service Partner (SSP)	foodtravelexperts.com
Sheremetyevo Airport	svo.aero
Sina Finance	finance.sina.com.cn
Soochow Securities	pg.jrj.com.cn
Statista	statista.com
Statistics Canada	statcan.gc.ca
Statistics Poland	stat.gov.pl
Swedavia	swedavia.com
Takamatsu Airport	takamatsu-airport.com
Tallin Airport	tallinn-airport.ee
TAV Airports	tavhavalimanlari.com.tr
Thansettakij Newspaper Thailand	thansettakij.com
The Edge Malaysia	theedgemarkets.com
The Freeman	philstar.com/the-freeman
The Manila Standard	manilastandard.net
The Moodie Davitt Report	moodiedavittreport.com
The National	thenationalnews.com
The Spirit Business	thespiritsbusiness.com
Times of India	timesofindia.com
Tocumen Airport	tocumenpanama.aero
Tokyo International Airport Company	tiat.co.jp/en
Toronto Pearson International Airport	torontopearson.com
Toscana Aeroporti	toscana-aeroporti.com
Travel Daily Media	traveldailymedia.com
Travel Markets Insider	travelmarketsinsider.net
Travel Weekly	travelweekly-asia.com
TRBusiness	trbusiness.com
UC Allablog	allabolag.se
Vinci Airports	vinci-airports.com/
Vnukovo Airport	vnukovo.ru
World Duty Free	worldldutyfree.com
Yox (Bulgaria)	yox.bg
Zagreb Airport	zagreb-airport.hr
Zheshang Securities	stocke.com.cn
Zurich Airport Website	flughafen-zuerich.ch

INTRODUCTION

DISCLAIMER

METHDOLOGY

DATA - North America

DATA - Latin America & Caribbean

DATA - Western Europe

DATA - Nordic & Baltic Europe

DATA - Central & Eastern Europe

DATA - Southeast Europe

DATA - Russia/CIS

DATA - Sub-Saharan Africa

DATA - Middle East & North Africa

DATA - South Asia

DATA - Southeast Asia

DATA - East Asia

DATA - Oceania

DATA SOURCES

**ABOUT AIRPORT INSIGHTS**

## About Airport Insights

Airport Insights ([www.airportinsights.com](http://www.airportinsights.com)) is a provider of market research, competitive intelligence and consulting services to the airport world, focusing on

- ▶ Market, Financial & Competitive Intelligence for the airport and airport-related sectors
- ▶ Airport Commercial Revenues and Space Benchmarking
- ▶ Airport Commercial Space Planning
- ▶ Airport Commercial Revenues Due Diligence
- ▶

For more information about the services that we can provide, please contact us at [mail@airport-insights.com](mailto:mail@airport-insights.com)