



MIDDLE EAST & AFRICA
DUTY FREE ASSOCIATION

THE NEW FACE OF TRAVEL RETAIL IN TUNISIA

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TUNISIA



- As a travel retail marketplace, Tunisia is unique . Very different from other Middle Eastern players.
- Tunisia is changing politically and economically
- Fundamental change to the travel retail in the country.



Gebr. Heinemann
Gegründet 1879



Gebr. Heinemann, ATU and Hamila took over the travel retail operations in 5 Tunisian Airports and created

Tunisia Duty Free

- Create the best shopping experience for travelers in North Africa
- Meet the changing customer profile's needs and wants
- Capture the new passengers profile (spending more money and aware of luxury brands)

New standards

- Changing the look and layout of the airport retail spaces
- Increasing the available space in both departures and arrivals by 30%.
- A complete remodeling of all airports
 - More than 10000 SKU's.
 - Branded new boutiques.
 - Exclusive brands.



Before renovation



After Renovation





PHILIP MORRIS

scorpio
worldwide



Pernod Ricard



Imperial
Tobacco



BRITISH AMERICAN
TOBACCO

L'ORÉAL
Produits de Luxe

GUERLAIN

BVLGARI

DIAGEO

Our Supplier partners are key

- Retail theatre
- Higher level of promotional activity
- Digital communications
- A loyalty card.

So, are we going to provide the right tools and the right setting for premium brands?

Absolutely!

- We expect 20% immediate uplift in year 1
- 10% growth thereafter with 5 fold increase in Arrivals.

Can luxury brands thrive in our environment?

We believe so!

- set a new benchmark for the continent.
- Invest 35 million Euros to create shopping environments that will delight the passengers and drive sales.
- Create a brand new range of store concepts : luxury boutiques, beauty at large and specialty stores.
- Upscale the retail offer : quality furniture and design, wide product range including travel exclusives.
- House new brands at the airport including Victoria's Secret, Ferragamo, Desigual, Michael Kors, Tom Ford and Furla.
- Open stand alone mono brand shops, with focus on luxury and premium brands.

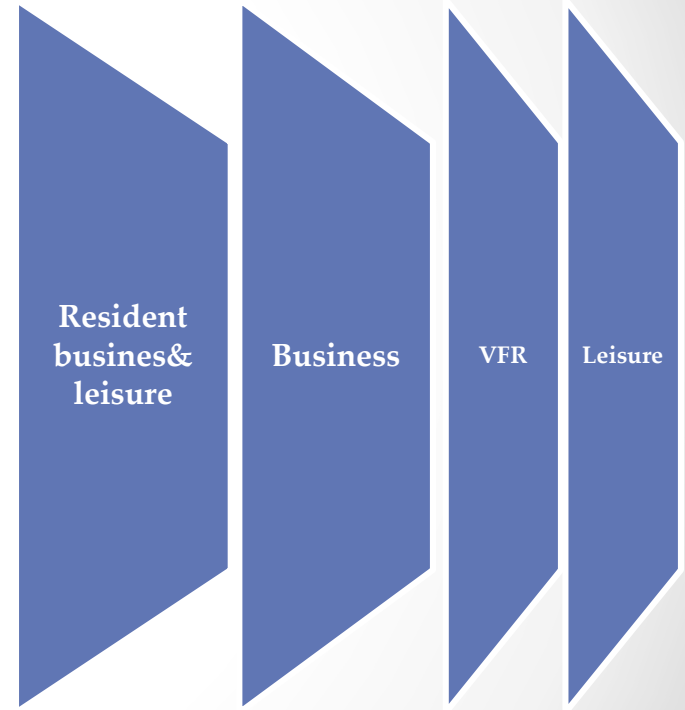
The best shopping experience in North Africa



Creating a shopping destination

- A growing number of Tunisian and European travelers.
- A growing middle class in the country
- Top tier Business passengers

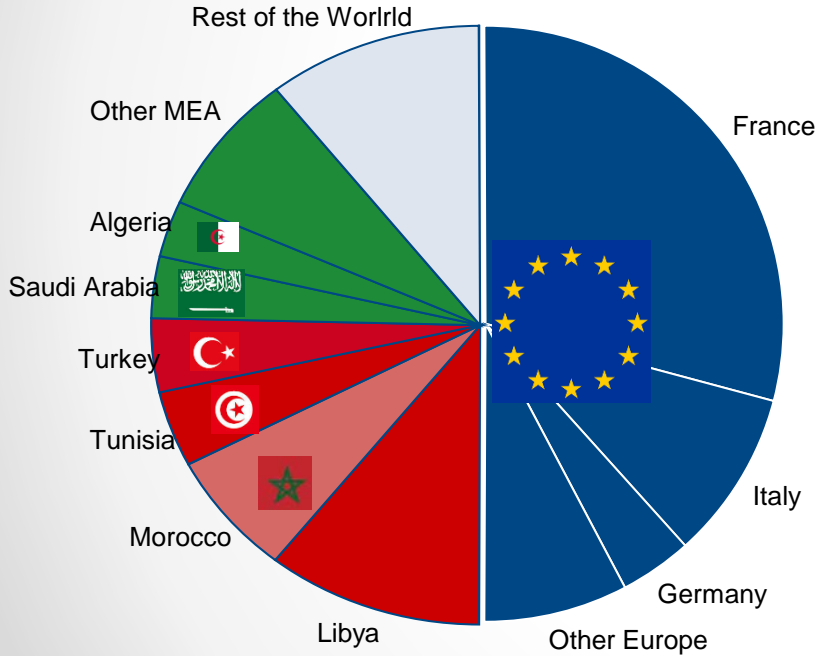
**Providing a new experience for
Travel Retail in Tunisia**



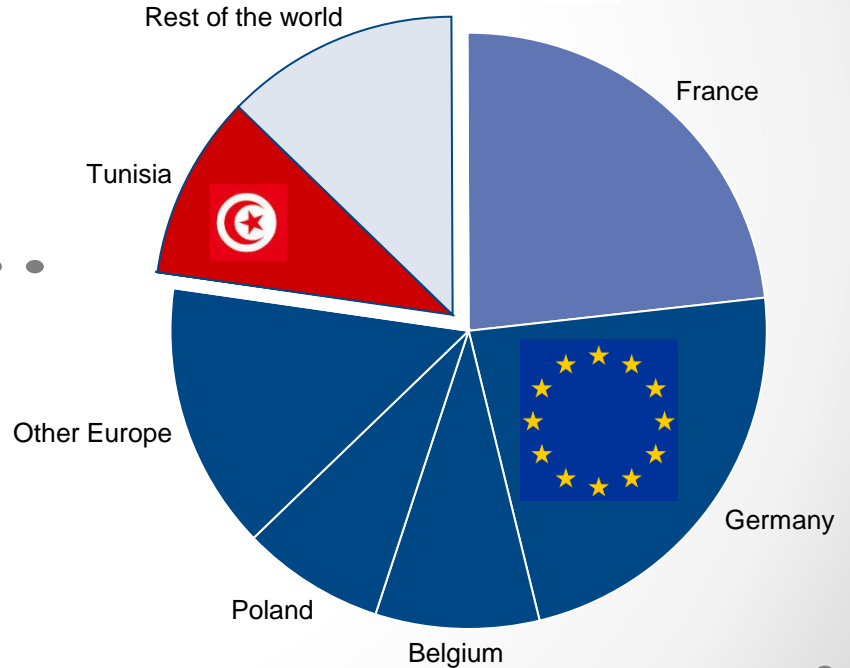
Differentiated offer in each airport depending on passenger profile and purchasing behavior

Traffic split by Origin & Destination (2012)

TUNIS



DJERBA



Affordable luxury , exclusivity & better customer service

Gebr. Heinemann, ATU and Hamila, intend to employ

- New customer insights
- New business models
- Innovative strategies to reach out to our wide and diverse customer segment.

Supported by integrated planning and marketing campaigns that will include:

- Stand out shop layout that is designed with best sight lines and ease of navigation
- Greater dynamism to all promotions
- Improved merchandising
- A communications strategy that works inside and steps outside the airports
- Greater scope for branded advertising

Are we providing the right environment for
luxury brands to thrive

