



UN World Trade Organization: International tourism demand exceeds expectations in the 1H 2013

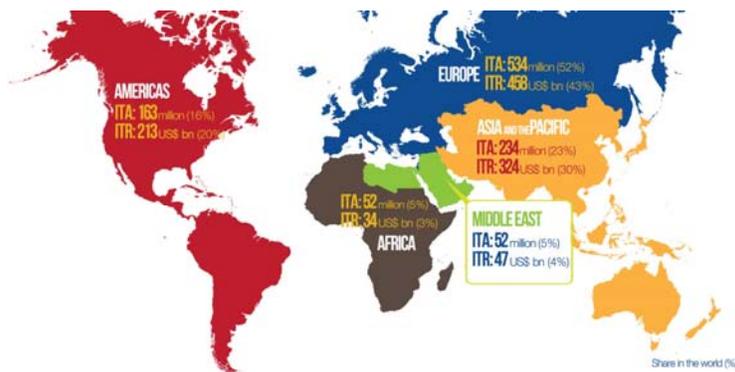
International tourist arrivals grew by 5% during the first half of 2013 compared to the same period of 2012, reaching almost 500 million, according to data just released by UNWTO. Growth was above the projection made at the beginning of the year (+3% to +4%) and is also exceeding the trend of the UNWTO long-term outlook Tourism Towards 2030 (+3.8% a year).

Destinations around the world welcomed an estimated 494 million overnight visitors in the first six months of 2013, according to the Advance Edition of the *UNWTO World Tourism Barometer* released on the occasion of the UNWTO 20th General Assembly. This represents an increase of 5% or an additional 25 million international tourists compared to the same period of 2012. Growth was stronger in emerging economy destinations (+6%) than in advanced economies (+4%), a trend which has marked the sector for many years now. Results were weaker than anticipated in the Americas (+2%), as South America and the Caribbean lagged behind.

“The fact that international tourism grew above expectations confirms that traveling is now part of consumer patterns for an increasing number of people in both emerging and advanced economies,” said UNWTO Secretary-General, Taleb Rifai. “This underlines the need to rightly place tourism as one of the key pillars of socio-economic development, being a leading contributor to economic growth, exports and jobs.”

In a still uneven global economic environment, results were positive in all regions and sub-regions, though the overall picture was mixed. Europe (+5%) performed surprisingly stronger than expected, driven by Central and Eastern Europe (+10%) and Southern and Mediterranean Europe (+6%). Asia and the Pacific (+6%) also exceeded expectations, , boosted by South-East Asia (+12%) and South Asia (+7%).

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Duty Free Partners launches new inflight program for Venezuela's SBA airlines: Program features DFP's state-of-the-art Sky POS technology

Miami-based travel retail company Duty Free Partners is launching a brand new inflight program for Santa Barbara Airlines (SBA), the national airline of Venezuela, as it begins servicing the carrier's inflight duty free concession effective September 1.

SBA flies from Caracas to destinations throughout Latin America, the United States, the Caribbean and Spain.

The beautifully appointed SBA

inflight catalog features a full range of top name duty free fragrances, cosmetics, watches, jewelry, sunglasses and other accessories, small electronics, cigarettes and brand name liquor, says Willy Perez de Corcho, Duty Free Partners CEO Inflight Americas.

“This new inflight concession in Venezuela will complement nicely the rest of the operation that we have there, which includes a packing station and a ground shop at

Venezuela's Maracaibo Airport in addition to a border shop at the border with Brazil,” Perez de Corcho explains.

The project is receiving full support from SBA in advance of the September 1 launch.

“The airline is sending an email blast to all of its customers announcing the new program. A specially designed pamphlet about the duty free offers will also be

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PEOPLE

New CEO at AA2000

Buenos Aires based airport management specialist **Aeropuertos Argentina 2000** (AA2000) has appointed **Matias Patanian** as Chief Executive Officer. Patanian a 22-year veteran of **Corporacion America**, the biggest shareholder in AA2000, has held a number of posts within the group controlled by **Eduardo Eurnekian** and most recently was Purchasing Director in the parent company. Patanian takes over from **Fernando Pelaez** who will remain on the main board of AA2000 but will now be involved with new business development projects for Corporacion America.

Pelaez, who took over from the well-respected **Ernesto Gutierrez**, held the CEO post for less than 12 months.

Patanian will work directly with AA2000 Chairman **Rafael Bielsa** as the airport management company continues to debate with the Fernandez de Kirchner government over the best way forward for the airport system in Argentina.

AA2000 currently controls 33 airports in the country that account for more than 90% of the passenger traffic in the country. In recent weeks the Buenos Aires economic press has speculated that the government is seeking to retake control of the **Aeroparque** airport in the country's capital to strengthen the position of state controlled flag carrier **Aerolineas Argentinas**.

Although AA2000 would seem to be against such a move, the company may be tempted to submit to the government's wishes, if they are able to extend their concession at **Ezeiza Airport**, the principal international gateway for Argentina.



Aeropuertos Argentina 2000

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UNWTO: 1H 2013 International tourism higher

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As stated above, tourism arrivals to the Americas lagged behind at +2%.

The first semester normally accounts for some 45% of the total arrivals count of the year (the Northern hemisphere high season months of July and August fall into the second semester). Growth is expected to continue in the second half of 2013 but at a gradually slower pace. UNWTO forecasts 2013 to end at 4% or slightly above, thus exceeding the initial estimate for the year.

Asia & Pacific and Europe lead

Asia and the Pacific (+6%) saw robust growth boosted by the increase in arrivals to South-East Asia (+12%), a sub-region which WTO reports is maintaining the "extraordinary momentum of recent years," and South Asia (+7%).

In **Europe**, international tourist arrivals were up 5% despite the lingering economic difficulties. Growth was led by Central and Eastern Europe (+10%) and Southern and Mediterranean Europe (+6%).

The **Americas** (+2%) reported a rather weaker first half of 2013 compared to the strong growth of previous years. Central America (+4%) performed above the region's average, while arrival numbers were flat in the Caribbean and in South America.

In **Africa** (+4%), the growth of recent years was sustained during the first half of 2013 due to the continued recovery of North Africa (+4%) and the positive results of Sub-Saharan destinations (+4%).

The **Middle East** rebounded after two years of negative growth with an estimated increase in international arrivals of 13%. Yet, WTO says these results should be taken with caution as growth is rather uneven across destinations and this assessment is based on still limited available data and reflects data up to June only.

Tourism expenditure growth driven by emerging economies

Emerging economy outbound markets continue to drive growth both to emerging and advanced economy destinations.

China (+31%) and Russia (+22%) led the growth in expenditure on travel abroad among the top ten most important source markets in the world during the first half of 2013. Outside the top ten, Brazil is back with a 15% increase after a more moderate 2012.

Expenditure from traditional markets, on the other hand, was more modest. Canada (+3%) and France (+2%) led the group, followed by the flat results of the United States, Germany and the United Kingdom, and negative figures from Japan, Australia and Italy.



Cover of Duty Free Partner's inaugural inflight catalog for Venezuela's Santa Barbara Airlines (SBA) launching Sept. 1.

Duty Free Partners launches SBA program

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inserted in all boarding pass jackets. The inflight catalogs are also available at all SBA ticket counters and offices and announcements will be made about the service for 30 days after it begins," says Perez de Corcho. The Santa Barbara program is one of the first airlines to take advantage of Sky POS, Duty Free Partner's special proprietary inflight technology system. The DFP program utilizes cutting edge POS mobile technology with seamless integration of front and back office systems, providing state-of-the-art inventory management and demand planning systems, using intuitive, user-friendly handheld computers that

can manage not only the onboard Duty Free service but a number of additional auxiliary services such as BOB (Buy-on-board). The data delivers timely access to key reports and KPI (key performance indicators) data, providing industry-leading flexibility and adaptability in customizing and tailoring to airline specific needs.

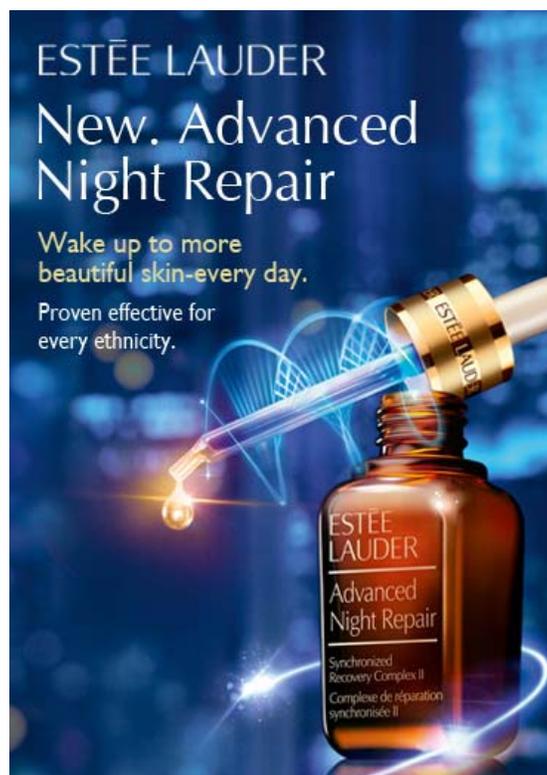
"Our in-house IT department is constantly developing and updating systems," he added, explaining that the system has been under development for the past 18 months.

Duty Free Partners currently handles the inflight duty free programs onboard airlines in India, Sri Lanka, USA, Canada and Latin America.

UNWTO Long-term Tourism outlook

- International tourist arrivals worldwide will increase by 3.3% a year from 2010 to 2030 to reach 1.8 billion by 2030 according to UNWTO long term forecast *Tourism Towards 2030*.
- Between 2010 and 2030, arrivals in emerging destinations (+4.4% a year) are expected to increase at double the pace of that in advanced economies (+2.2% a year).
- The market share of emerging economies increased from 30% in 1980 to 47% in 2012, and is expected to reach 57% by 2030, equivalent to over one billion international tourist arrivals.

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Fetzer and Zipz launch first single-serve premium wine product in select Major League Baseball stadiums

On Major League Baseball's opening day in April Fetzer and industry newcomer Zipz launched a Single-Serve Premium Wine product in select North American stadiums.

The revolutionary new serving option is now being presented to the cruise sector and duty free operators, says Bruce Losee, Commercial Director at Fetzer Vineyards.

Zipz, a new wine company, has developed and trademarked a new single-serve wine glass and has partnered with Fetzer to bring this product to consumers nationwide.

Fetzer just released a new line of premium wines, Crimson Red

Blend and Quartz White Blend, that it says is the ideal wine to pair with Zipz.

"Both companies have made a significant commitment to the partnership. Fetzer Crimson and Quartz will be the first wine release in the partnership, followed by other wines under the Zipz brand—it's a partnership we couldn't be happier with," said Rodrigo Maturana, Global Brand Director for Fetzer.

This innovation will allow consumers to enjoy Fetzer's Crimson Red Blend and Quartz White Blend, on-the-go at stadiums, convention centers, special events and more. As part of this partner-

ship, Centerplate, the largest provider of food and beverage services in North America's sports and entertainment industry, collaborated with Fetzer and Zipz to bring this unique offering to select stadiums across the country.

"We believe that wine drinkers will appreciate a high quality wine in a convenient, well-designed single-serve glass at the park," said Centerplate's Chief Design Officer, John Sergi.

To use the 100% 187 ml-sized recyclable Crimson and Quartz Zipz glass consumers simply pull the tab on the Zipz Clean Wrap[®] covering the glass and unzip the wrap, remove the lid, snap the lid on the bottom, and peel off the lift 'n' peel seal.

The Crimson & Quartz Zipz glasses launched in San Francisco's

AT&T Park, Seattle's Safeco Field and Tampa Bay's Tropicana Field this season. Centerplate and Fetzer have plans to expand the foodservice distribution of Crimson and Quartz through menus at Centerplate's Major and Minor League ballparks, NFL stadiums and convention centers this year.

Crimson & Quartz Zipz will cost approximately \$9.00 - \$11.00 at stadiums across the country. Fetzer plans to roll out the product to grocery retail in Summer 2013. For more information, visit Zipz at www.zipzwine.com



Concha y Toro announces travel retail agreement with Barry Global Innovation

Wine giant Concha y Toro has announced a new partnership with Barry Global Innovation to act as its advisor and work with their team on expanding their presence in global travel retail. Concha y Toro, which owns wineries in Chile, Argentina and the USA (through the 2011 acquisition of Fetzer-Bonterra from

Brown Forman) can offer travel retail operators a Pan American supply base of premium quality wines, says the company.

Barry Global Innovation Ltd (BGI) was founded in 2010 by Barry Geoghegan, who has a Wine MBA from Bordeaux Business School. BGI, focusing 100% on the travel retail channel, has built up a very strong network of customers in the travel retail sector, with distribution in over 50 different markets today.

"I am delighted to be working with the superb wines of Concha Y Toro in travel retail. I have enormous respect for the company and its wines and look forward to working again with some old and new friends to introduce the travel retail operators to one of the world's truly great wine ranges," says Barry Geoghegan, Founder of BGI.

Duncan Brown, Head of CyT Travel Retail Europe, commented: "We look forward to working with Barry in the very important Travel Retail channel, and to bringing to key operators some of the world's most awarded and admired wine brands. Barry has more than 10 years' experience of working with our wines and has first-hand knowledge of our vineyards and wine makers, and we are delighted to welcome him back into the fold."

"With Barry's experience and understanding of the sector, allied to the strength of our brands, we feel we will be in an ideal position to assist operators grow their wine sales to their ever more discerning customer base."

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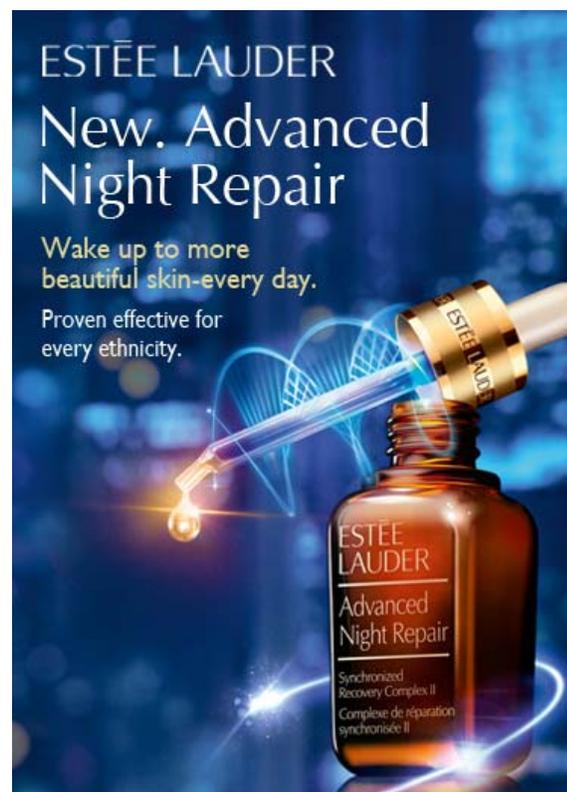
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representing the duty free industry for more than 45 years.

