# ADP VISION FOR RETAIL

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Groupe ADP, France

# Back to 2002 !

**(whereas inflation was + 30% over the same period…)**

Indexed spending per passenger in the airport (2002: 100)

| | CAGR 2002-2017 | CAGR 2002-2013 |
|---|---|---|
| Asia-Pacific | 6.2% | 8.9% |
| Middle East | 4.9% | 9.3% |
| Americas | 3.7% | 6.6% |
| Average | **3.4%** | **5.8%** |
| Africa | 2.4% | 5.2% |
| Europe | –0.1% | 2.0% |

**Sources:** Albatross; BCG analysis.

# Competitors are very agressive on key lines

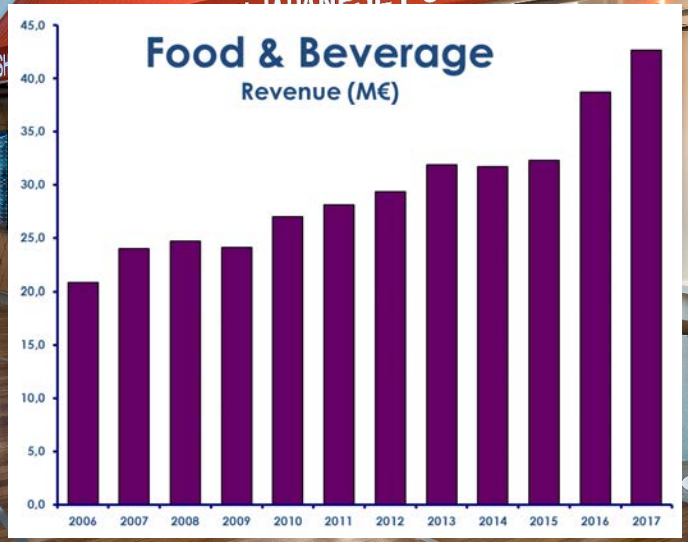
# Is our Duty Free Price still competitive ?

# Health concerns are growing

# What future for Tobacco and Spirits sales ?

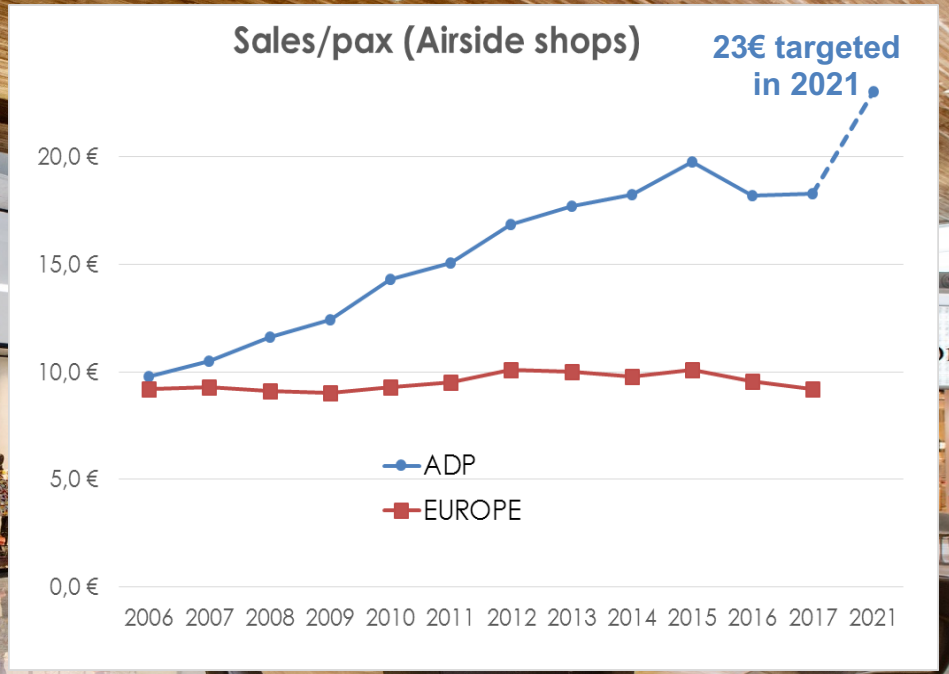
# Is Airport retail still a promising business ?

# Is Food & Beverage the new Eldorado ?




# F & B is undoubtly a fast growing business !

# The ultimate Parisian dining experience




# But Retail remains the heart of our strategy !

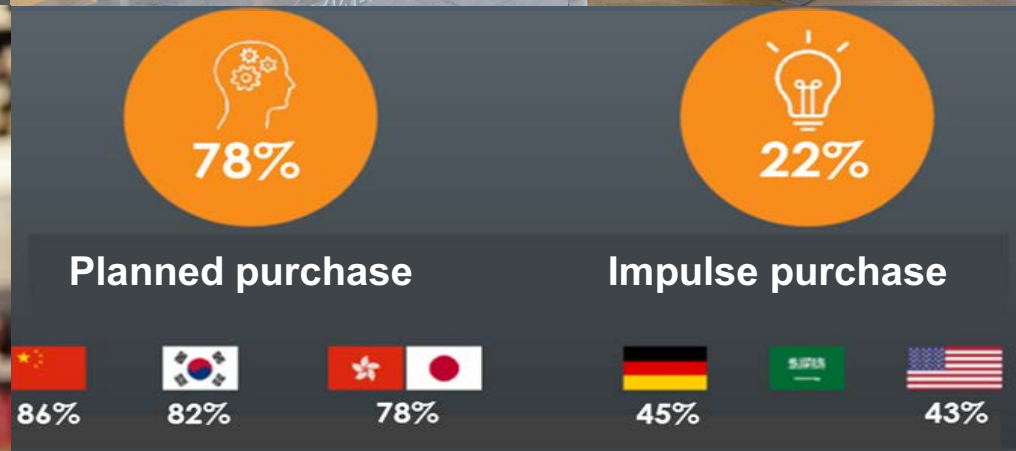
# … and with strong growth perspectives

| | SEPHORA | | Marionnaud PARIS | | NOCIBÉ | |
|---|---|---|---|---|---|---|
| | Spring 2017 | | Spring 2017 | | Spring 2017 | |
| | Index | Gain / Loss vs. LY (in pts) | Index | Gain / Loss vs. LY (in pts) | Index | Gain / Loss vs. LY (in pts) |
| Fragrances | 121 | - | 119 | +1 | 123 | +1 |
| Skincare | 121 | +2 | 119 | +2 | 120 | - |
| Make up | 122 | +1 | 120 | +2 | 123 | +1 |
| TOTAL P&C | 121 | - | 119 | +1 | 122 | - |

## Restore Price competitiveness

## From a classical Duty Free to a Parisian Department store

## Differentiation via service

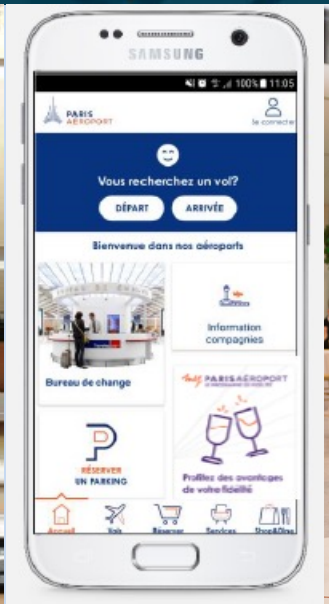



## Demand Stimulation

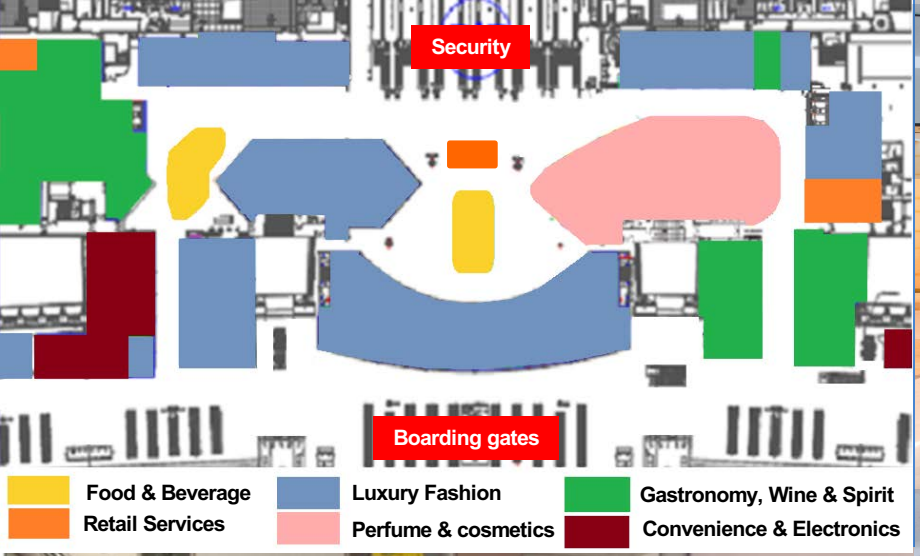
12
9
3
6
MASTER OF TIME

PERSONALIZATION

STAFF INTERACTION


SAMSUNG
PARIS AÉROPORT
Vous recherchez un vol?
DÉPART
ARRIVÉE
Bienvenue dans nos aéroports
Information compagnies
Bureau de change
RÉSERVER UN PARKING
Profitez des avantages de votre fidélité

M49
M49




# From a classical Duty Free to a Parisian Department store

# The Terminal 2E Hall K : our flagship and laboratory

ADP MARKET SHARE
ON THE FRENCH BEAUTY MARKET
11.0%
10.0%
9.0%
8.0%
7.0%
6.0%
5.0%
2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017
BUY PARIS DUTY FREE
Dior
CHANEL
SKINCARE
CLARINS
CLARINS
FACE

Cartier
CHANEL
CHANEL
HERMÈS
Dior

LOUIS VUITTON
LOUIS VUITTON
K43

LADURÉE
Macaro

Hennessy
Hennessy

LA MAISON
DU CHOCOLAT
PARIS

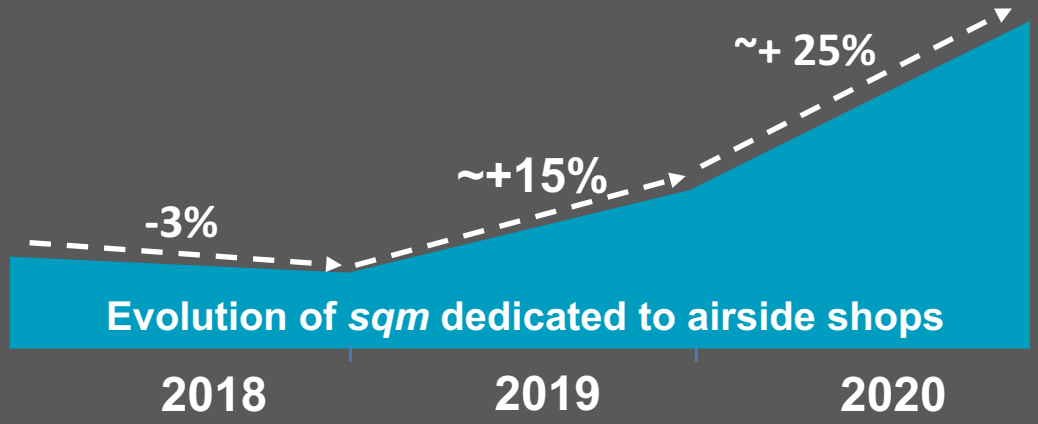
BUY PARIS DUTY FREE
CONFISERIE . GASTRONOMIE . VIN . SPIRITUEUX . TABAC
2+1

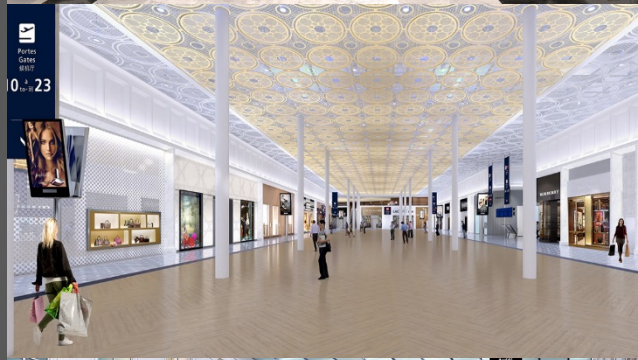
CAVE A GRANDS CRU

# 2018-2020 :

*Out of our 8 international Terminals*

## 6 new or fully refurbished airside commercial zones





# Orly South international (opening 2020)

## The ultimate Parisian shopping experience

# CDG 2B/2D (opening 2020)

## The ultimate Parisian shopping experience

# 2E Hall L (opening 2020)

The ultimate Parisian shopping experience