

# How Competition Is Evolving in the Travel Retail Market

*The Business Research Company's Travel Retail Global Market Report 2026 – Market Size, Trends, And Forecast 2026-2035*

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/EINPresswire.com/ -- The [travel retail market](#) is characterized by the

presence of large global duty-free operators, airport retail specialists, and regionally dominant players focused on enhancing passenger experience

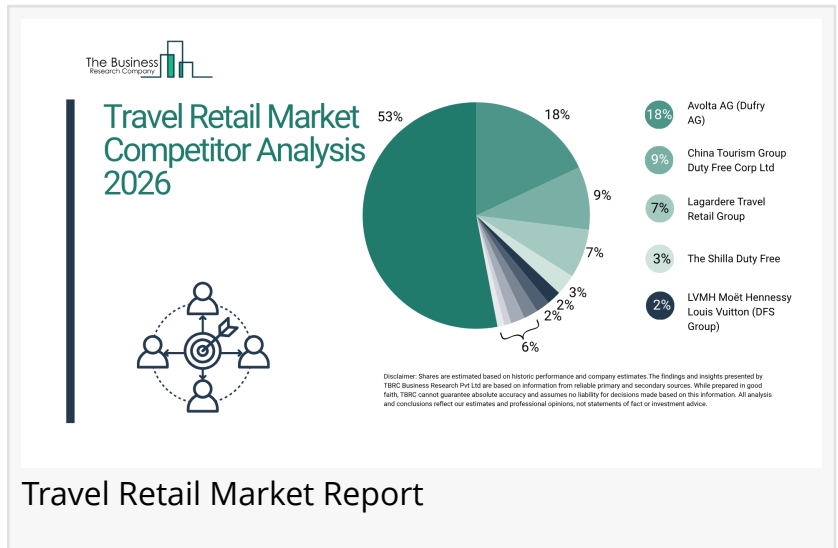
and maximizing non-aeronautical revenue streams. Companies are prioritizing premiumization of product offerings, digital integration, omnichannel retail strategies, and strategic partnerships with airports and brands to strengthen their market position. In addition, operators are increasingly investing in store modernization, data-driven customer engagement, and exclusive product assortments tailored to international travelers. Understanding the competitive landscape is essential for stakeholders aiming to capitalize on rising global passenger traffic, evolving consumer preferences, and the expansion of airport infrastructure across emerging and developed markets.

## Which Market Player Is Leading The Travel Retail Market?

- According to our research, Avolta AG (Dufry AG) led global sales in 2024 with a 18% market share. The company's travel retail division, which is directly involved in the travel retail market, offers a broad portfolio of duty-free and duty-paid retail operations across airports, cruise lines, seaports, and other travel hubs, providing a wide range of products including luxury goods, cosmetics, fragrances, fashion, food and beverages, and travel essentials that support global passenger retail experiences and commercial operations within regulated international travel environments.

## How Concentrated Is The Travel Retail Market?

- The market is concentrated, with the top 10 players accounting for 47% of total market revenue in 2024. This level of concentration reflects high entry barriers driven by long-term concession



agreements with airports, significant capital requirements, and the importance of global operational scale. Leading vendors such as Avolta AG (Dufry AG), China Tourism Group Duty Free Corp Ltd, Lagardere Travel Retail Group, The Shilla Duty Free, LVMH Moët Hennessy Louis Vuitton (DFS Group), Lotte Duty Free (Hotel Lotte), Gebr Heinemann SE & Co KG, Dubai Duty Free, WHSmith Travel, and King Power International Corp. maintain competitive advantage through extensive airport partnerships, strong brand collaborations, diversified geographic presence, and continuous investment in retail innovation and customer experience. At the same time, regional operators and niche players contribute to competitive dynamics by focusing on localized assortments, luxury offerings, and tailored services for specific traveler segments. As international travel continues to recover and expand, strategic partnerships, concession renewals, and digital transformation initiatives are expected to further strengthen the position of key players while sustaining competitive intensity across the evolving travel retail market.

- Leading companies include:
  - o Avolta AG (Dufry AG) (18%)
  - o China Tourism Group Duty Free Corp Ltd (9%)
  - o Lagardere Travel Retail Group (7%)
  - o The Shilla Duty Free (3%)
  - o LVMH Moët Hennessy Louis Vuitton (DFS Group) (2%)
  - o Lotte Duty Free (Hotel Lotte) (2%)
  - o Gebr Heinemann SE & Co KG (2%)
  - o Dubai Duty Free (2%)
  - o WHSmith Travel (1%)
  - o King Power International Corp. (1%)

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Which Companies Are Leading Across Different Regions?

- North America: Dufry AG (Avolta), Duty Free Americas Inc., DFS Group, Lagardère Travel Retail, Gebr. Heinemann SE & Co. KG, SSP Group Limited, ARI (Aer Rianta International), World Duty Free Group, Peace Arch Duty Free and Baltona Duty Free are leading companies in this region.
- Asia Pacific: China Duty Free Group (CDFG), Avolta, Lagardère Travel Retail, Gebr. Heinemann SE & Co. KG, DFS Group, Aer Rianta International (ARI), Nuance Group AG (part of Dufry/AVOLTA), The Shilla Duty Free and Lotte Duty Free are leading companies in this region.
- Western Europe: Avolta, Lagardère Travel Retail, Gebr. Heinemann, DFS Group and Aer Rianta International are leading companies in this region.
- Eastern Europe: Baltona, Unimex Group, Aer Rianta International and Flemingo Duty Free Ukraine are leading companies in this region.
- South America: Dufry AG, Duty Free Americas Inc., Lagardère, LS Travel Retail, Nuance Group AG, Aer Rianta International (ARI), James Richardson Group and Baltona Duty Free are leading companies in this region.

- Middle East: Aer Rianta International (ARI), Dufry AG, Lagardère, Dubai Duty Free, Qatar Duty Free, Gebr Heinemann, LS Travel Retail, Flemingo International, King Power International Group, Nuance Group and Baltona Duty Free are leading companies in this region.
- Africa: Aer Rianta International (ARI), King Power International Group, Lagardère Travel Retail, Flemingo International, Dubai Duty Free, Nuance Group AG and Dufry AG are leading companies in this region.

#### What Are The Major Competitive Trends In The Market?

- Storytelling-led premiumization and exclusive collaborations are transforming the travel retail market by enhancing brand differentiation, elevating consumer engagement, and driving high-value gifting demand across global airport channels.
- Example: In October 2025, Highland Park pre-launched its travel retail-exclusive “Between You and I: Journeys with Dubai Duty Free,” a 17-year-old single malt developed in collaboration with Björn Frantzén, inspired by global journeys and the Orkney distillery.
- Its immersive airport activations, color-rich packaging, narrative-driven positioning, and curated experiential elements strengthen consumer connection, boost premium appeal, and support higher sales conversion in travel retail environments.

#### Which Strategies Are Companies Adopting To Stay Ahead?

- Heritage-Led Branding Elevating Premium Travel Retail Offerings
- Expanding Footprint Across Airports And Transit Hubs To Capture Passenger Growth
- Digital Experiences Transforming In-Store Travel Retail Engagement
- Flagship Airport Stores Creating Immersive Destination Retail Spaces

Access The Detailed Travel Retail Market Report Here

[https://www.thebusinessresearchcompany.com/report/travel-retail-global-market-report?utm\\_source=EINPresswire&utm\\_medium=Paid&utm\\_campaign=Apr\\_PR](https://www.thebusinessresearchcompany.com/report/travel-retail-global-market-report?utm_source=EINPresswire&utm_medium=Paid&utm_campaign=Apr_PR)

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