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TRAVEL MARKETS Vol. 19-12

# INSIDER

## Montreal's Trudeau Airport delivers one of highest growth rates in Canada

As our colleagues gather in Montréal for the Frontier Duty Free Association Annual Convention, *Travel Markets Insider*, in conjunction with commercial data hub CiR Business Lounge –take a closer look at the host city's primary international airport, Montréal-Trudeau.

With total PAX growth of +9.0% in the twelve months up to August 2017, Trudeau Airport has experienced one of the highest growth rates of all Canadian airports, behind only Vancouver (+9.2%) and Kelowna (+13.9%).

In terms of international PAX, the airport has welcomed over 900,000 additional travelers in the same period (+9.1%), bringing the rolling twelve-month total to 10.9 million, the third highest in the country after Toronto Pearson and Vancouver, and far surpassing the Canadian average (+4.7%).

As previously reported new direct services and Canada's reputation as a safe travel destination is driving demand from the Far East, with local tourism bodies targeting Chinese travelers in particular as a potential source of growth for the tourism industry. February this year saw Air Canada seek to capitalize on the demand for travel between China and Canada, launching a service from Montréal to Shanghai – Quebec's second Chinese connection after Air China's Beijing service which itself has only been in operation since September 2015. The new service has more than doubled available seats on the route.

Looking forward to Q1 2018, growth at Montréal will be driven by the airport's least developed destination markets: seats to APAC

are up +31%, and the Middle East and Africa +18%, whereas intra-regional Americas routes are up +7%, and transatlantic European routes are lagging behind, currently showing just a +2% increase. Key growth markets across the regions will be Morocco (+51%) and China (+31%), as well as Mexico (+20%) and Italy (+52%), whereas routes into other key Western European destinations are considerably down: Germany (-13%) and the Netherlands (-11%).

An influx of traditionally high spending nationalities such as the Chinese will be welcome news for airport operator Aer Rianta, who has recently refurbished their Montréal offering - which includes a "Canadiana" area that showcases the best of local Canadian products alongside leading global brands--delivering a true sense of place and allowing the retailer to keep up with the changing demands of duty free customers.

*See special graphic on page 2.*



## Canadian duty free finishes summer with strong sales

Canada's duty free stores ended the summer on a positive note, with sales at both airport and land border shops up in August, according to the latest figures from the Canada Border Services Agency (CBSA).

August airport sales jumped 24% with sales for the first eight months also up 13.92%. Land border sales for the month rose 3.62% with sales flat (.02%) YTD.

Perfume, Cosmetics, Skincare, the number one category at airport duty free shops with 35.6% of sales, increased 22.44% in August, and is up 14% for the year. Number two category Alcohol (20% of sales) had an even better month, up 26.38%. Through the first eight months it has risen 12.9%. Tobacco (7.53% of sales) grew 30% for the month and 6% for the year.

Land border sales were not as overwhelmingly positive in August, but still grew. Alcohol (44.4% of sales) was up 6.5% for August and 2.13% for the year. Tobacco (20% of sales) rose 9.8% in August, but is down slightly, .34%, for the year. Perfume, Cosmetics, Skincare (13.22% of sales) grew 3.32% for the month and is up 5.6% for the year.




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Global TR contact: Zack Boiko, [zboiko@actium.us](mailto:zboiko@actium.us); Latam-and Caribbean TR: Daniel Bras, [dbras@actium.us](mailto:dbras@actium.us)




**CiR** BUSINESS LOUNGE  
AN NPD GROUP COMPANY

## MONTRÉAL TRUDEAU (YUL)

Key Traveller Statistics Summary powered by CiR Business Lounge  
[www.counterintelligenceretail.com](http://www.counterintelligenceretail.com) [www.cirbusinesslounge.com](http://www.cirbusinesslounge.com)

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AIRPORT & PAX FACTS



**17.7m** +9.0%  
Total PAX Sep 16-Aug 17


**2.0m** +11.2%  
Total PAX August 2017

**International v Domestic**



International (58%)    Domestic (42%)

**International PAX**  
% Split by terminal








Terminal  
T1


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TOP DESTINATIONS






**Airport Destinations**

 Paris CDG	<b>9%</b>
 New York LGA	<b>7%</b>
 Chicago ORD	<b>4%</b>
 Fort L'derdale FLL	<b>4%</b>
 Cancun CUN	<b>3%</b>

**% SPLIT BY DESTINATION REGION**  
International flights only








**Country Destinations**

 USA	<b>41%</b>
 France	<b>13%</b>
 Cuba	<b>7%</b>
 Mexico	<b>6%</b>
 Dominican Republic	<b>4%</b>






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OUTBOUND TRAFFIC





**Nationalities**

 Canada	<b>53%</b>
 USA	<b>21%</b>
 France	<b>6%</b>
 Cuba	<b>3%</b>
 Mexico	<b>2%</b>

**Key Airlines**

 Air Canada	<b>42%</b>
 Air Transat	<b>15%</b>
 Delta Air Lines	<b>7%</b>
 Sunwing	<b>6%</b>
 American Airlines	<b>6%</b>

**Seat Class**

 First Class	<b>2%</b>
 Business Class	<b>6%</b>
 Premium Economy	<b>5%</b>
 Economy	<b>88%</b>

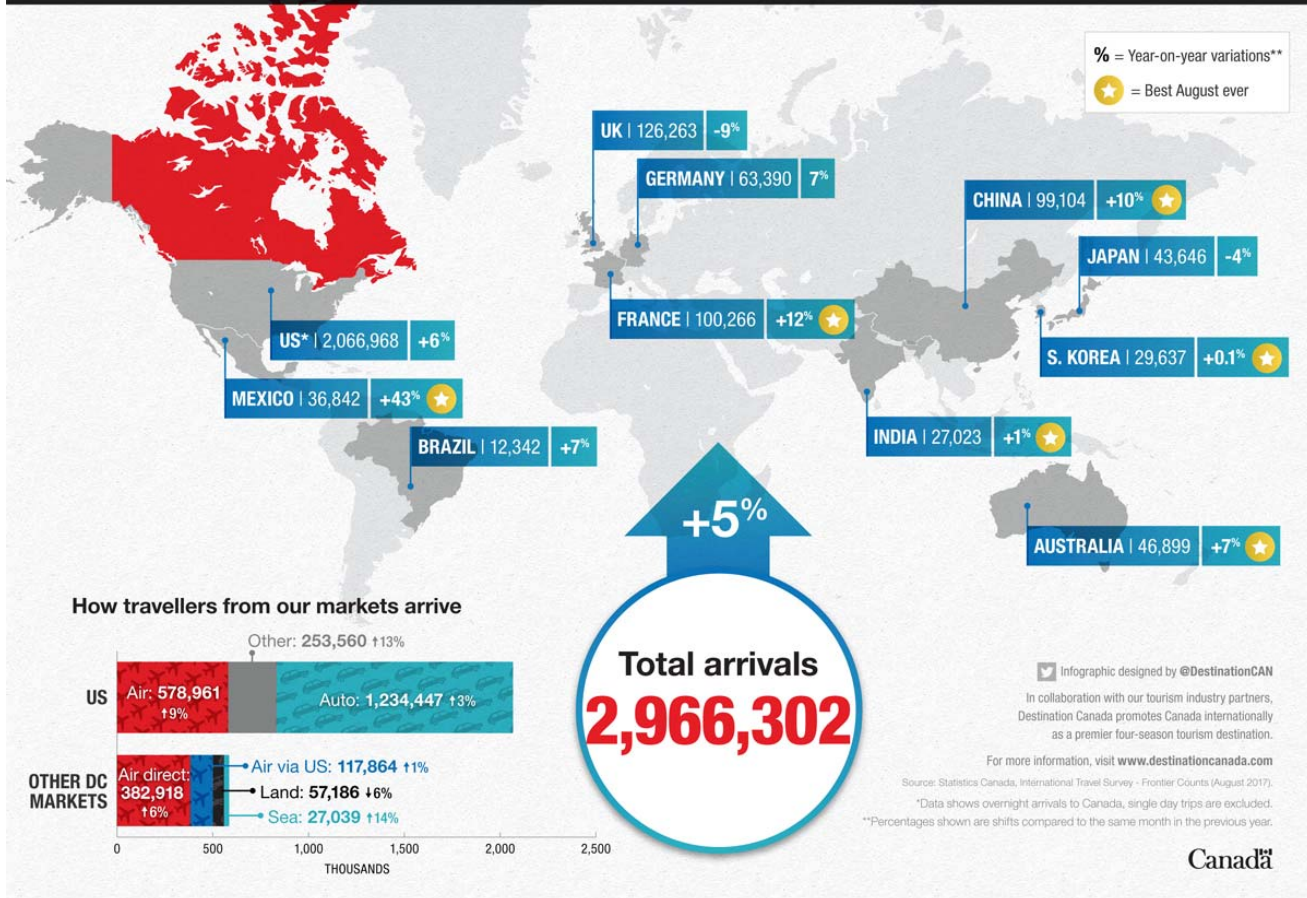
PAX Source: CAPA – For further news, market intelligence & data for 4,000 airports globally visit <http://centreforaviation.com>  
 All other data source: CiR Business Lounge GTS 550 database | All data displayed for departing passengers on scheduled international flights only (Sep 16-Aug 17)  
 Data displayed for Nationalities is based on residency through place of ticket purchase

For more information, please contact Simon Best; [simon@counterintelligenceretail.com](mailto:simon@counterintelligenceretail.com)

Copy and graphic by Luke Stockton, CiR

Travel Markets Insider 255 NE 3<sup>rd</sup> Ave., #312, Delray Beach Florida USA 33444 [parsnip5@aol.com](mailto:parsnip5@aol.com) [www.travelmarketsinsider.net](http://www.travelmarketsinsider.net)

# August 2017 at a glance\*



## Strong August propels Canadian tourism this summer

Canada welcomed more than 8.7 million international visitors this summer, including a record-breaking 2.6 million arrivals from overseas, according to the latest figures from Destination Canada.

Destination Canada markets Canada internationally in 11 countries: Australia, Brazil, China, France, Germany, India, Japan, Mexico, South Korea, the UK and the USA.

Year-to-date through August, overnight arrivals from these international markets were up 4%.

In August alone Canada received almost 3 million travelers, up 5% over August 2016 with strong growth from Mexico, France and China. Six of Destination Canada's markets had their best August ever this year, with France, China, Mexico, India, South Korea, and Australia all setting new records.

August also saw overnight arrivals from the United States rebound with a gain of 6%, year-over-year.

This performance was supported by robust increases in arrivals by air (+9%) and gains in overnight visitors by automobiles (+3%) across all provinces, except British Columbia and Nova Scotia.

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## Shiseido Travel Retail forges ahead into next phase of growth

Shiseido Travel Retail strikingly demonstrated its ‘One Shiseido, One Travel Retail’ vision in Cannes this year, as it gets set to embark on the second phase of the Shiseido Group’s corporate plan in 2018.

In line with the unification philosophy, Shiseido Travel Retail consolidated its presence with a newly relocated booth that presented its entire brand portfolio in the same space.

Shiseido’s Vision 2020 plan is a medium-to-long term strategy that was announced at the end of 2014 by Group President and CEO Masahiko Uotani.

It is designed to rejuvenate Shiseido Group and outlines two consecutive three-year plans (2015–2017 and 2018–2020) to restructure the foundation of the business and accelerate growth.

The company says that the aim is to become a truly consumer-oriented marketing company, combining innovative product development with marketing that is focused on insights into consumer needs and purchasing behavior.

“The first phase of Vision 2020 marked the inception of Shiseido Travel Retail, and the unification of our cosmetics and fragrance businesses last year has given new impetus to our growth in this dynamic, fast-growing channel,” said Shiseido Travel Retail President Philippe Lesné.

“We closed FY2016 with a solid +28% net sales growth (including fragrances and Travel Retail Japan)

– three times above the market – and in the first half of 2017, net sales surged by close to +80%.”

Lesné continued: “We are extremely encouraged by these results and are in prime position to achieve our 2020 goals of more than US\$2 billion in retail sales, 8% market share, and a fourth ranking among beauty groups in global travel retail. Our share of total Group sales is expected to exceed 7% in 2017, which keeps us on track to hit our target of 10% share by 2020. Now that we have laid a solid foundation for growth, we are ready to take on all the challenges and opportunities that the next phase will bring.”

### Design paid homage to Japan

The 446 sqm Shiseido booth in Cannes was designed under the theme of ‘Modern Japan’, and blended traditional Japanese aesthetics and contemporary design in an inviting space that brought together the worlds of beauty, art, culture and technology.

The color scheme of champagne gold and grey was complemented by warm lighting, soft carpeting, light wood finishing and lush green plants, creating a welcoming and zen-like setting that embodied Shiseido’s spirit of omotenashi (hospitality).

In an homage to Shiseido’s Japanese heritage, the booth featured motifs of the symbolic Hanatsubaki (camellia) logo and octagonal shapes, inspired by the original powder packaging



All the brands in Shiseido Travel Retail exhibited together for the first time in at TFWA World Exhibition in Cannes this year, in a new location.

introduced by Shiseido back in the 1900s. The octagon is also a symbol of the Eight Trigrams (八卦) that form the basis of the Chinese Confucian classic Yi Jing (Book of Changes), from which the name ‘Shiseido’ (資生堂) originated.

Digital elements included several large LED screens playing the latest brand campaigns as well as a 360-degree video of art collective teamLab’s ‘A Forest Where Gods Live’ art exhibition, proudly sponsored by Shiseido Group.

To highlight its diverse portfolio of skincare, make-up and fragrance brands, Shiseido Travel Retail created dedicated alcoves that were designed to express each unique brand DNA and the latest product launches.

### Spotlight on brands

At the center of the Shiseido showcase is the brand’s new ‘Wow Window’ – a digital video installation depicting a variety of abstract icons in 3D, including the camellia logo, lipsticks, flower petals, crystals, moving water, and compact cases. The product launch line-up was headlined by the enhanced Ultimune Power Infusing Concentrate, new skincare line Essential Energy and the travel retail exclusive 24 Hour Defense Mist Duo. A ‘Beauty Reimagined’

wall, designed in collaboration with the Make-up Center of Excellence, offered a sneak preview of Shiseido’s major new color cosmetics collection launching in Fall 2018. The other featured brands in the booth included luxury Clé de Peau Beauté, prestige skincare brand IPSA, which made its travel retail debut with a minimalistic design concept; and make-up brands NARS, bareMinerals and Laura Mercier.

Dolce&Gabbana had an impactful presence with its extensive product showcase and beachfront terrace. Replicating its travel retail counter design, the brand channeled Italian opulence with gold accents and black lacquered shelves which displayed its fragrance and make-up portfolio.

The fragrance line-up featured Issey Miyake, Narciso, Serge Lutens, Elie Saab and Zadig & Voltaire.

“Going forward, we will accelerate growth by focusing on four pillars: insights-driven marketing, sales productivity, operational excellence, and expansion of our portfolio, particularly our core brands Shiseido, Clé de Peau Beauté, NARS Cosmetics, and Dolce&Gabbana,” Lesné concluded.



## PGT brands up their game

Travel retail specialist Premier Global Trading has a number of exciting updates to its brands, says PGT president, Elizabeth Taylor. PGT reports excellent growth and expansion in all DF/TR channels, which the company supports with interesting and motivating promotions, workshops and trainings, says Taylor.

Core to PGT's portfolio are the **Zwilling Beauty Group** brands which include **Tweezerman** and sold in over 60 countries worldwide. A new key addition is the Tweezerman Exper-Tweeze Lighted Tweezer developed with extensive R&D.

PGT has **Myme** electronic accessories listed on more than 65 cruise ships among other outlets. "A break-out range is the Myme Unity, a brilliant phone system that offers a magnet attraction between cradle and any phone make, allowing you to place your phone just about anywhere with 360 degree rotation to position it at any angle. The cradle adheres to any smooth, flat surface with a superior "lock-on" mechanism," says Taylor.

**BioMiracle**, the Korean-made, single application face masks and peels, was recently featured on the hugely popular US TV Show, *The Real Housewives of Dallas*, to great response. Already the leading trend in Asia, this product category is enjoying explosive growth and popularity around the world.

**Aquinelle Toilet Tissue Mist** aired twice on premier shopping channels Home Shopping Network and sold out both times in under eight minutes.

The soothing, dermatologist-tested mist instantly transforms ordinary toilet tissue into a refreshing cleanser, and replaces heavy, bulky wipes that can clog septic systems on planes, cruise ships. Its 3.5 ounce size is TSA compliant.

**Strumento Marino** is the award winning Italian Dive Watches that combine functionality and Italian design at very attractive prices. Made with high quality components and reliable Japanese movements in an array of premium features and details specific to the diving pro or someone who wants to look like one. New styles are available now, says Taylor.

PGT also has an array of products in its **Kids World** category that features many licensed characters.

**CandyRific**'s toy/candy combinations in licensed characters from Star Wars, Trolls, Frozen, now introduces Sippy Cups and Projector Pops for the holiday season. PGT's **Kids Insect Repelling Superbands** and **Hand Sanitizer** come in Mickey Mouse & Friends, Marvel and now Princess characters. The bands do not contain Deet and keeps bugs away for up to 250 hours.

New to the PGT line-up of Kids products, are **Powerhouse TOYS**, as assortment in such trending licenses as Peppa Pig, Paw Patrol, Shopkins, Mario Bros, and more.

See all of the PGT brands at [www.PremierGlobalTrading.com](http://www.PremierGlobalTrading.com)

## IBBI brings new and innovative brands to FDFA

International Brand Builders, IBBI- the travel retail company formed by Katherine Sleipnes that has been primarily focused on the jewelry/watch sector, has formed a new division that is carrying a variety of unique TR brands in other categories.

As a result, IBBI is bringing a new selection of innovative brands from Cannes to Montreal. These include beauty medical devices from Beurer Germany, Nici Toys from Germany, Morgan & Oates Scarves from England, and Innovative Eyewear from Denmark.

"All of these brands are perfect for the Canadian border stores and airports, and we look forward to sharing them in our suite," said Katherine Sleipnes, President IBBI.

IBBI is also presenting its new jewelry brand, Misaki Monaco, which is refocusing on the Americas region (shown below).

"Stephanie Crone, IBBI brand manager, will be showcasing the new collections straight from the recent Tax Free Show in Cannes. Its latest collections, inspired by jazz music and dance, are already available to purchase on airlines such as Air France, Swiss Air, Lufthansa, China Airlines, Korean Air, Emirates, Aeroflot and Singapore Airlines. It is a great choice for retailers targeting the Asian passenger," adds Sleipnes.

Apart from these new offerings, IBBI is showcasing the new SS18 collections from Buckley London, Lambretta watches, Obaku Denmark, and Baylis & Harding bath/body, that already sell well across Canada.



## Denizen to debut its Canada collection destination travel memory jewelry

Attendees at the 2017 FDFA Show will be able to see the sleek new Denizen destination jewelry line with a powerful sense-of-place design.

Manufactured south of the border in Houston, Texas, Denizen is unveiling its Canada collection as a new exhibitor during the FDFA Convention. The line will be exclusive to Travel Retail, as in all the other countries where the brand is retailed.

First created in 1989 on the jet-set island of St Barth, the patented concept remains unmatched in Travel Retail, and nearly three decades later, the brand has become a most sought-after memento and travel gift in the Caribbean and beyond, says Denizen Travel Retail Director Estelle Baumann.

Today, Denizen is sold on all 7 continents, with over 220 destinations designs in 100 countries, across all Travel Retail channels.

"Our concept embodies travel destinations through cut out maps, in a subtle yet unequivocal way," she says about the collectible souvenir, which is also a fine or fashion jewelry piece. The company differentiates its lines by price points, collections, packaging, and even displays for each market segment, she says.



*Tweezerman's Rose Gold  
Love Story Gift set*





**Breitling Caribbean**  
has immediate opening for the following position

**Marketing Coordinator:**

**Responsibilities Include**

- \*Process Co-op submissions, invoices and coordinate end of year reports.
- \*Update daily advertising budgets.
- \*Facilitate in-store visual/transparency merchandising requests from POS in keeping with corporate guidelines.
- \*Order creative for print media and approve tag lines.
- \*Fulfill outdoor creative needs
- \*Coordinate media agency requests
- \*Liaise closely with marketing director on other marketing initiatives and events as needed.

**Position Requirements:**

- \*Full Time, Miami based office-local candidates.
- \*Minimum 3 years of relevant professional experience.
- \*Exceptional MS office skills.
- \*English a must, Spanish and other foreign languages a plus.
- \*Outstanding organizational, communication and presentation skills.
- \*Strong attention to detail.

Please send resumes to  
[Heidi.dettinger@breitling.bs](mailto:Heidi.dettinger@breitling.bs)



**Executive Assistant to the President**  
**BREITLING Caribbean**

**Specific responsibilities include but are not limited to:**

- \*Type letters, reports, e mails from electronic Dictaphone.
- \*Reformat documents drafted by executives and send out.
- \*Work multiple priority activities that require considerable coordination and follow through to meet deadlines and requests.
- \*Maintains President's highly active calendar by setting, monitoring, and confirming appointments; reminding President of schedules; preparing visitors material reports and developing itineraries-travel plans.
- \*Work independently and/or within a team on special projects as assigned.
- \*Liaise with clients/partners.
- \*Utilizes knowledge of company culture, operations, policies, procedures in performing duties with minimal direction/supervision.
- \*Keeps copious notes at all meetings, attends meetings president is unable to attend. Manages and orders office supplies.

**Position Requirements:**

- \*Full Time, Miami based office-local candidates.
- \*Minimum 3 years of relevant professional experience.
- \*Exceptional MS office skills.
- \*Pro-active.
- \*Strong attention to detail.
- \*Excellent interpersonal skills.

Please send resumes to  
[info@breitling.bs](mailto:info@breitling.bs)



**Sell-In Sell-Out Analyst**  
for the Miami Office of  
**BREITLING Caribbean**

Using proprietary analysis and reporting tools, position will monitor and access performance and support management decision making.

**Specific responsibilities include but are not limited to:**

- \*Extracting and interpreting data.
- \*Updating and running statistical models, tracking results against forecasts, and fine-tuning future Forecasting.
- \*Creating budget modeling through sales analysis, interpretation of future forecasting variables.
- \*Build reporting structures on SKU, category and whole-business performance.
- \*Prepare key weekly, monthly and quarterly reports via PowerPoint presentations, conference call and or meetings.

**Other functions:**

- \*Developing databases, data collection systems, and other strategies for statistical efficiency.
- \*Research, evaluate, and implement new analytic techniques or technologies.
- \*Providing support and training to other analytics staff.
- \*Analyze customer sales databases, tabulating sales reports for contest results.

**Position Requirements:**

- \*Full Time, Miami based office-local candidates.
- \*Minimum 3 years of relevant professional experience.
- \*Exceptional analytical and MS office skills.
- \*Strong attention to detail.

Please send resumes to  
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**\*NEW\***  
**CLARINS GROUPE**  
has an opening for an  
**East Coast Sales Coordinator**

The ideal candidate is highly organized, dynamic, self-motivated and with strong sales, analytical and managerial skills. Responsible to develop the sellout in his/her territory, Beauty Advisor management, implementation of merchandising, stock level follow-up, retail sales analysis, and promotion set-up among others.

Ability to travel 50%.  
Proficient in MS Office.  
Education: Bachelor's degree  
Experience: Minimum 1 year experience in a commercial or similar role.  
Experience in Luxury Company within TR is a plus.

Please send resumes to:  
Deborah Seckler  
[Deborah.Seckler-Tarac@clarins.com](mailto:Deborah.Seckler-Tarac@clarins.com)

### Kate Spade Fragrances The Premiere Group

#### has an opening for an International Trade Marketing Manager

Reporting to Sr. VP International Bachelor in Marketing, International Trade or equivalent  
New York based –  
No relocation package

The ideal candidate must have excellent communication and presentation skills  
3 to 5 years' experience,  
Well-travelled and multilingual.

Responsibilities include:  
Adapt Global Marketing presentation to international needs at country level;

Review and validate marketing calendar at country level with Global Marketing.

- Review country unit forecast vs individual marketing calendar.
- Liaise with Global Marketing on artwork for logos, Duratrans
- Maintain POS, Duratrans photo library;
- Validate Ad spend with Global Marketing

- Receive and validate stock order vs forecast and marketing /launch/promo calendar.
- Allocate G's Testers, Sample, gift sets and other promotional items at country level;
- Process Press/Health registration product orders
- Other duties as required.

Please send resumes to  
[HR@tpgbeauty.com](mailto:HR@tpgbeauty.com)

### ALTIMETRE GROUP

has an immediate opening for an:

#### Account Coordinator Caribbean Territory Description

Sales development and customer support (merchandising, training, promotion) for the beauty market in the Caribbean. Current activities are for a prestigious, imported Baby/maternity beauty and hygiene brand.  
Additional beauty brands in the future.

#### Requirements

- Must be able to open accounts and negotiate best sell-in conditions in stores.
- Retail knowledge to organize sell-out promotions and Actions at points of sale. Channels include pharmacies, drug stores, perfumeries, hotels.
- 3+ years retail sales experience in health/cosmetics, and/or knowledge of the territory required.
- Ability to work independently, prioritize and handle multiple deadlines.
- Excellent organization and attention to detail.
- Must be able to travel at least 50% of the time.
- Fluent English; Dutch and Spanish a plus.,
- Can be a multi-company freelance sales rep.

Please email your resume to [adv@altimetregroup.com](mailto:adv@altimetregroup.com)

### ACTIUM

Has immediate openings for the following positions based in Miami:

#### Area Manager Caribbean & Central America (Beverages Division)

Manage relationships with existing clients and prospect for new ones in assigned region in both domestic and travel retail markets. This role will require the candidate to **drive sales**, design and monitor the implementation of marketing plans, train sales force of all clients and act as an interface between the brand and the clients and ensure seamless flow of information.

#### Requirements

- 3 years of relevant professional experience
- Travel 25% minimum
- English and Spanish (French is a plus)
- Excellent communication and presentation skills
- Results oriented
- MS office skills

Please send your CV to:

[Dflores@actium.us](mailto:Dflores@actium.us)



Heinemann  
Americas, Inc.

Has an immediate opening for a  
Category Sales Manager  
for Liquor, Tobacco and  
Confectionary

#### Tasks:

#### Category Management

Create customer price lists, manage category space responsibilities; track and measure sales results, secure category information for the region, PAX, channel, or other market research; work in conjunction with Purchasing to develop vendor supported promotional programs and other items; verify all forecasts maintained in the replenishment system.

#### Sales Coordination

Create new product offers & catalogues, communicate assortment updates; create & maintain assortment files; coordinate information entered in SAP; maintain promotional calendar and create monthly presentations for customers; issue customer credit and debit notes.  
Additional responsibilities may apply.

#### Position Requirements

Full Time, HQ based position (Coral Gables); graduate degree (college). English a must, Spanish and other foreign languages a plus.

Please send resume to  
[info@heinemann-americas.com](mailto:info@heinemann-americas.com)

### \*NEW\*

#### Beauty Industry Account Executive Needed Michel Germain Parfums Ltd.

an award winning, leading Canadian creator and manufacturer of prestige fragrances, with customers throughout North America, seeks a dynamic proactive sales professional to manage our **Duty Free Business in Canada and the Caribbean** as well as independent retailers in Canada and the USA.

You must have prior beauty industry experience, be able to work independently, driving growth with our customers. Ideally you will have at least 10 years of sales experience in the beauty industry, with a proven track record of sales growth and excellent account management.

Canadian residency is not required.

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Management and marketing company for Wines, Spirits and Consumer Health Care, Stansfeld Scott is seeking an energetic and resourceful **Caribbean Area Manager**, based in Florida or the Caribbean, to represent a portfolio of internationally recognized brands across the Caribbean.

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