

Duty Free Americas and The Estée Lauder Companies announce strategic global retail partnership



Left: Jerome Falic, Chief Executive Officer, Duty Free Americas. Right: Olivier Dubos, SVP and GM, Travel Retail Worldwide, The Estée Lauder Companies

Duty Free Americas and The Estée Lauder Companies have announced a strategic global retail partnership to launch ELC brands across DFA stores.

Calling the collaboration “a significant milestone in elevating prestige beauty experiences for international travelers,” the joint press announcement says the agreement will be a key driver in ELC’s accelerated expansion ambitions in The Americas.

“We are very excited to launch this partnership with The Estée Lauder Companies and its exceptional portfolio of beloved brands,” said Jerome Falic, Chief Executive Officer, Duty Free Americas.

“This collaboration is underpinned by our shared commitment to delivering best-in-class retail experiences for international travelers. By integrating ELC’s world-class brand portfolio and deep consumer understanding with DFA’s expansive retail network and operational expertise, together we are uniquely positioned to drive further growth, enhance in-store engagement, and set a new benchmark for excellence in travel retail.”

Under the agreement, DFA will be carrying ELC’s portfolio of beauty brands throughout its retail network, according to the announcement.

The two companies have not done business together since 2015, when an intense dispute led to a long-drawn out court case. The break-through news that the two leaders in their fields will resume a business relationship was made by ELC President and CEO Stéphane de La Faverie during the earnings call last month following the fiscal year results.

“We are delighted to enter a strategic global retail partnership with DFA, a leader in travel retail operations,” said Olivier Dubos, SVP and GM, Travel Retail Worldwide, The Estée Lauder Companies.

“This partnership is anchored in consumer centricity – the driving force behind our Beauty Reimagined strategy. As we continue to elevate the role of travel retail in building brand equity, we look forward to partnering with DFA to deliver exceptional experiences that deepen consumer connections with our iconic brands and products.

“We are confident that our work together positions us well to generate strong retail sales growth in The Americas for ELC’s travel retail business in fiscal 2026.”

DFA is the largest duty free operator in the Americas, operating in more than 200 locations at major airports and international



IN MEMORIAM:

Anthony (Tony) Pinero

September 10, 1945-August 10, 2025

Travel Markets Insider is very sad to report the death of Anthony (Tony) Pinero, whose company, Whitney Associates, was responsible for building exhibition booths and POS displays for the travel retail industry in the Americas and worldwide for decades.

Pinero passed away on August 10 following a two-year battle against ALS (Lou Gehrig’s Disease). According to his twin brother, Ron, Pinero continued to work after his diagnosis, designing duty free shops all over the world. The Veteran’s Administration supplied him with special mobility devices and electronics so he could use his computer even as the disease progressed.

Tony is survived by his wife Brenda, sons Glen, Michael and Frankie, and three brothers.

We at *Travel Markets Insider* send our deepest condolences to his family and friends.

borders, including retail concessions in such major airports as Miami, Atlanta, New York JFK, Washington D.C., and Dallas Fort Worth in the U.S. as well as throughout Central and South America.

Cellshop opens new store in Paraguay on border with Brazil

Cellshop Importados Paraguay officially inaugurated its new 5,000-sq-meter store in Pedro Juan Caballero – Shopping Dubai, on the border with Ponta Porã (Brazil) on September 4, 2025.

“This opening marks a new chapter in the history of Cellshop Importados Paraguay, reaffirming our commitment to growth, innovation and regional expansion,” said company founder and president Jorbel Griebeler on LinkedIn after the opening.

See the Cannes issue of *Travel Markets Insider* for an exclusive, in-depth interview between John Gallagher and Griebeler discussing Cellshop’s incredible growth on the Triple Border and beyond.



BY THE NUMBERS

UNWTO: International tourism up 5% in first half of 2025 despite global challenges

International tourist arrivals grew 5% in the first six months of 2025 compared to same period of 2024. This is about 4% above pre-pandemic levels.

All regions recorded growth except for North America, which was flat, and the Middle East, albeit from a very strong post-pandemic rebound.

According to UN Tourism, almost 690 million tourists traveled internationally between January and June 2025, about 33 million more than in the same period of 2024, though results were mixed among regions and sub-regions.

The newest edition of the World Tourism Barometer reports that:

The Americas recorded 3% growth in January-June 2025, with mixed results across sub-regions. While **South America** (+14%) continued to enjoy solid growth, **Central America** saw a 2% increase in arrivals and **North America** saw flat results (+0%) mostly due to small declines in the United States and Canada. **The Caribbean** (+0%) also saw weaker performance partly due to softening demand from its major source market, the United States.

International tourism arrivals grew by 12% in **Africa** in January-June 2025 compared to the same period in 2024. Both North Africa (+14%) and Sub-Saharan Africa (+11%) recorded double-digit growth.

Europe welcomed nearly 340 million international tourists in the first half of 2025, about 4% more than in 2024 and 7% more than in 2019. Northern, Western and Southern Mediterranean Europe all recorded 3% growth despite uneven monthly results. Central and Eastern Europe continued to rebound strongly (+9%), but remained 11% below 2019 levels, according to data.



The **Middle East** recorded 4% fewer arrivals than in 2024. Nevertheless, this is 29% more arrivals than the same period of 2019, the strongest regional results relative to 2019.

Arrivals in **Asia and the Pacific** grew 11% this period, which is 92% of the pre-pandemic figure (-8% compared to 2019). North-East Asia (+20%) saw the strongest performance relative to 2024, though it remained 8% below 2019 levels.

Country highlights

Some of the highest growth rates among large destinations in the first half of 2025 were recorded by Japan and Vietnam (+21%), the Republic of Korea (+15%), Morocco (+19%), Mexico and the Netherlands (+7%). Malaysia and Indonesia both recorded 9% growth and Hong Kong (China) 7%, though arrivals remained somewhat below 2019 levels in these destinations.

The world's top destinations France (+5% through May) and Spain (+5%) also recorded solid growth in arrivals this period.

According to IATA, both international air traffic (RPKs) and international air capacity (ASKs) grew 7% in January-June 2025 versus 2024. Global occupancy in accommodation establishments reached 69% in June 2025, slightly below 70% in June 2024. Occupancy reached 71% in July 2025 (same as in July 2024) based on STR data.

UN Tourism also reports that 2024 international tourism spending grew 11% to a record US\$1,734 billion, about 14% above pre-pandemic levels (real terms) reflecting already strong visitor spending around the world last year.

Imperial Brands unites Global Travel, Rizla and Nordics in new cluster

Imperial Brands has created a new Global Travel, Rizla & Nordics (GTR&N) Cluster, to better serve consumers across duty free, travel retail and the Nordic domestic markets.

The Nordic domestic markets will be brought together with Global Travel & Rizla to form a larger GTR&N Cluster. The unit will be led by Pierpaolo Pascucci, who has been leading the Global Travel & Rizla cluster and will now extend his leadership to include the Nordics, ensuring continuity for consumers and partners.

TFWA Cannes networking program

The week of the 2025 TFWA World Exhibition & Conference will kick off with para-sports activities, including blind football and wheelchair rugby on Sunday morning, September 28, co-organized by the Stade Toulousain Handisport charity and TFWA and supported by mInd-set. As part of this year's 'Yes We Cannes' para-sports program, the 500+ km para-bike ride from Toulouse will conclude in Cannes, with riders scheduled to arrive in front of Cannes City Hall at 17:30 on Saturday September 27th. More information about the para-sports program and the great cause it will support can be found [here](#).

The Opening Cocktail will take place at the Carlton Beach from 19:00. Access to this and all other networking events is complimentary for all badge holders.

The TFWA Lounge will return with both after-work and night-time sessions on Monday and Tuesday between 18:30-21:00 and 22:00-01:00. On Wednesday evening at 22:00, the beach will be transformed into the 'Phenomena Club'. The night-spot will feature a stellar lineup of DJs including the world-renowned Martin Solveig who will perform until 02:00.

Delegates can also take advantage of TFWA's **ONE2ONE** meeting service which facilitates introductions and organizes meetings between exhibiting brands, key buyers, airports and trade agents.

Heineken announces Natalia Kuldyaeva as new head of Global Duty Free business

Heineken has announced the appointment of Natalia Kuldyaeva as Global Duty Free Manager. In this strategic role, Natalia will lead the entire Heineken global duty free business across cruise-lines, ferries, airlines, border stores and diplomatic channels, reinforcing the company's ambitions to expand its premium presence in travel environments worldwide.

"I'm excited to be leading the Heineken business in global duty free, building on its already strong performance, and driving forward initiatives that align with the company's global ambitions to become the partner of choice and to win the hearts of consumers. Our focus is on delivering premium experiences and championing sustainable innovation at every opportunity," says Kuldyaeva.

"Global Duty Free is a powerful channel, offering both commercial growth and brand-building opportunities. Travel environments are ideal for driving premiumization and visibility, enabling us to create memorable connections with travelers for our iconic brands such as Heineken, Heineken 0.0, Birra Moretti, Tiger, Amstel and Desperados, as well as regional favorites such as Red Stripe and



Natalia Kuldyaeva

Cruzcampo. Together with our partners, we curate offerings tailored to the diverse preferences of multi-generation guests across cruise and air routes. In today's challenging domestic landscape, global duty free stands out as a strategic touchpoint, engaging consumers during their journeys and reinforcing brand relevance when they return home."

Since joining Heineken in 2003, Kuldyaeva has held a range of high-impact commercial roles including channel transformation, sales and marketing across several key international markets including the USA, Russia and Italy.

EssilorLuxottica's Alessio Crivelli elected new TFWA VP Marketing

The TFWA management committee has elected Alessio Crivelli, Global Travel Retail Director from EssilorLuxottica, as Vice-President Marketing on September 5th.

His mandate will run with immediate effect until the next election which will be held in October 2026.

"We'd like to extend a warm welcome to Alessio Crivelli as our new Vice-President Marketing. Representing EssilorLuxottica, a company that is a worldwide leader in our industry, he brings a professional background uniquely suited to this role, with an outstanding track record in marketing across renowned brands

including Adidas," said the TFWA Board in its official announcement.

"His Italian heritage will enrich the diversity of our board, and his presence will give greater voice to a community that champions the premiumization of our industry with distinction and style," the Board added.



Tito's Handmade Vodka announces Nick Cook as Managing Director, International Sales as John McDonnell departs at end of year



John McDonnell to leave Tito's after 15 successful years of building it into a global name.

Fifth Generation Distilled Spirits, Inc., home of Tito's Handmade Vodka, has announced the appointment of Nick Cook as Managing Director, International Sales, assuming the responsibilities of John McDonnell who will leave Tito's at the end of the year.

Prior to joining Tito's Handmade Vodka, Cook spent 17 years at Diageo in various leadership roles across the world. Most recently, he was General Manager, Global Travel, for Europe and the Americas.

At Tito's, Cook will guide the global commercial team, and be responsible for international domestic markets, global travel retail, military, and the cruise channel.

Nick Cook says, "I'm delighted to represent the Tito's team. I've long admired the brand and it's an extremely exciting time to partner with such an incredible business whilst building on the amazing foundation from John and the team.



Nick Cook joins Tito's from Diageo as Managing Director, International Sales.

"Tito's is already established in many places around the world and I'm looking forward to drawing on my international experience to cement it as a truly global brand."

"I could not be prouder of the work that the team and I have accomplished over my combined 15 years at Tito's. Starting from just a couple of markets in North America, together we have opened almost 150 countries and islands across the globe, and Tito's is now available at some 700 airports around the world," says McDonnell.

"I'm very pleased to now pass those reins to Nick, who I know will be an excellent complement to the Tito's team and I'm excited to see what the next 15 years brings under his leadership.

"For me, after these many years, I'm looking forward now to shifting my focus to becoming a board member and advisor to help small startups."

Tito's enters Argentina; appoints new distributor in Peru

In related news, Tito's Handmade Vodka is now available for the first time in bars, restaurants, and retail locations in Argentina, and has expanded distribution in Peru.

In Argentina, Tito's is represented by Buenos Aires-based Bodegas Salentein, one of the country's premier wine and spirits companies.

In Peru, Tito's has appointed Lima-based Bebidas Premium, which imports a full range of world-class wine and spirits brands.



TARIFFS UPDATES

U.S. imports declining following summer surge ahead of tariffs

Following a near-record peak this summer, import cargo volume at the United States' major container ports is expected to steadily decline for the remainder of the year amid rising tariffs, according to the Global Port Tracker report released on Sept. 9 by the National Retail Federation and Hackett Associates.

"We have seen the implementation of reciprocal tariffs across the globe, with a number of key trading partners being subjected to tariffs higher than the earlier 10% tariffs," NRF Vice President for Supply Chain and Customs Policy Jonathan Gold said. "We also continue to see more and more sectoral tariffs impacting a wider scope of products. Retailers have stocked up as much as they can ahead of tariff increases, but the uncertainty of U.S. trade policy is making it impossible to make the long-term plans that are critical to future business success. These tariffs and disruptions to the supply chain are adding costs that will ultimately lead to higher prices for American consumers."

In an editorial Sean P. Gazitúa, President & CEO of worldwide logistics company and foreign trade zone WTDC prepared for *TMI's* upcoming Cannes 2025 magazine, he comments:

"As of September 8, 2025, U.S. Customs and Border Protection (CBP) had collected \$166.7 billion in tariffs and taxes for the fiscal year, nearly double the amount collected by this time in 2024. And while tariffs are still a pressing topic, most tariffs have now been published. Companies are no longer in a paused tariff limbo, unsure of what duties would apply to their products and when. While Duty Free and Travel Retail products in a Foreign Trade Zone warehouse are unaffected by tariffs, the bottom lines of suppliers who also import into the U.S. are certainly affected."



Port photo courtesy of Hackett Associates.

NRF goes on to note that the U.S. tariffs are facing a legal challenge. While "reciprocal" tariffs on a number of countries took effect in early August, a federal appeals court later ruled against President Donald Trump's use of the International Emergency Economic Powers Act to impose the tariffs, said the organization. However, the appeals court left the tariffs in place while the ruling is under appeal to the Supreme Court.

Meanwhile, Trump delayed an increase in tariffs on China by 90 days to Nov. 10 so trade negotiations could continue. Trump also announced an additional 25% tariff on India that took effect near the end of August, bringing the additional tariff rate to 50%.

"Tariffs have had a significant impact on trade," Hackett Associates Founder Ben Hackett said. "The trade outlook for the final months of the year is not optimistic."

U.S. ports covered by Global Port Tracker handled 2.36 million Twenty-Foot Equivalent Units — one 20-foot container or its equivalent — in July, although numbers for New York/New Jersey, Port Everglades and Miami were estimated because they have not yet reported their data. That was up 20.1% from June as retailers brought in merchandise ahead of tariffs set

to take effect in August, and up 1.8% year over year. It would be the second-busiest month on record, topped only by 2.4 million TEU in May 2022.

Ports have not yet reported numbers for August, but Global Port Tracker projected the month at 2.28 million TEU, down 1.7% year over year but higher than that 2.2 million TEU expected before the postponement of China tariffs and the new tariff on India.

September is forecast at 2.12 million TEU, down 6.8% year over year; October at 1.95 million TEU, down 13.2%, and November at 1.74 million TEU, down 19.7%. December is forecast at 1.7 million TEU, down 20.1% year over year for the slowest month since 1.62 million TEU in March 2023.

While the falling monthly totals are related to tariffs, the year-over-year percentage declines are both because of this year's early peak season and because imports in late 2024 were elevated by concerns about port strikes.

The first half of 2025 totaled 12.53 million TEU, up 3.6% year over year. The full year is forecast at 24.7 million TEU, down 3.4% from 25.5 million TEU in 2024.

January 2026 is forecast at 1.8 million TEU, down 19.1% year over year.



Paradies Lagardère appoints John Jamison as President under new leadership structure

Paradies Lagardère has announced a new structure for its leadership and has promoted John Jamison, who has been CFO since 2021, to President.

Jamison will continue to report to Gregg Paradies, CEO, and will now oversee Retail and Dining Operations, Merchandising, Human Resources, Finance and Accounting, Information Technology, and Legal.

Prior to joining Paradies Lagardère, Jamison spent 18 years in a variety of finance roles at The Home Depot, reaching the position of Vice President of Finance.

"Since joining Paradies Lagardère, John has demonstrated superior leadership which has impacted the company well beyond the CFO role," says Gregg Paradies. "His ability to understand complex challenges and opportunities has helped us navigate external market challenges in recent years with excellent business acumen and actionable solutions. John is exceptionally well-equipped for this new executive role, and I'm confident he will lead with vision and impact."

David Bisset, Executive Vice President and Chief Development Officer, will also continue reporting to Gregg Paradies and will maintain his oversight of Business Development, Design, Construction, Marketing, and PR and Communications.