



BY THE NUMBERS

ForwardKeys: International aviation growth slowed to 4.5% in '19 but 1Q 2020 outlook buoyant

Growth in international air travel, as measured by passenger journeys, grew by 4.5% in 2019, reports global tracking agency Forward Keys.

This rate is well ahead of global economic growth, but is significantly slower growth than last year's growth of 6.0%. It is also slower than the trend over the last decade, which averages 6.8% per annum.

However, Forward Keys notes that the outlook for the coming three months is considerably more optimistic, with international flight bookings as of January 1, 2020 standing 8.3% ahead of where they were at the start of 2019.

External factors curtail growth

ForwardKeys' VP Insights, Olivier Ponti, commented: "Usually, aviation grows around three percentage points ahead of global GDP. However, in the past year, we have seen several events which have held back growth; these include U.S. trade disputes with Canada, China, Mexico and the EU, riots in Chile, France, Hong Kong and India, the grounding of the Boeing 737 Max aircraft, terrorism in Sri Lanka, the emergence of 'flight shaming' and the bankruptcy of Jet Airways."

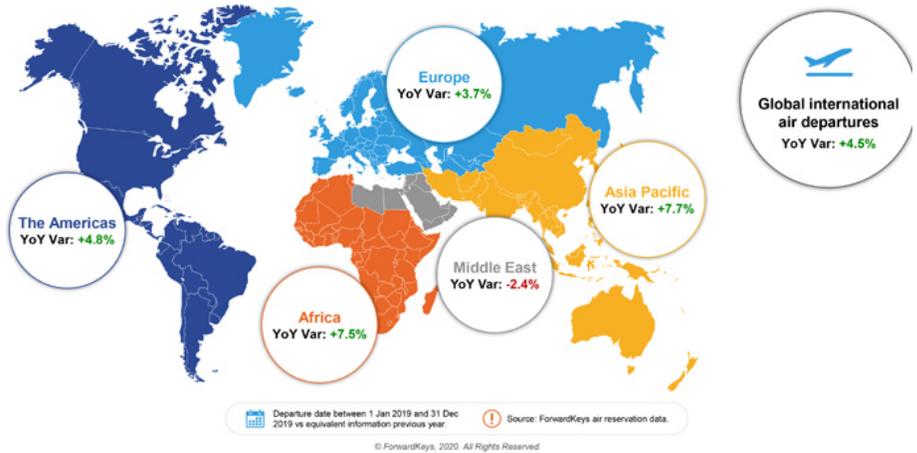
International traffic growth

Air travel grew in most parts of the world in 2019, with the notable exception of international departures from the Middle East, which were down by 2.4%.

The main cause of this was the bankruptcy of Jet Airways, which had the effect of cutting flight capacity between the Middle East and India.

Travel between Middle Eastern countries grew by 0.7% while travel to other parts of the world fell by 3.9%.

International air departures by worldwide regions, Jan-Dec 2019, Year-on-Year variation



The stand-out region in terms of international aviation growth in 2019 was Asia Pacific, where international outbound travel grew by 7.7%, reflecting the strong economic growth of the region.

Travel between countries in the Asia Pacific region grew even more strongly, by 8.7%.

Europe did particularly well as a destination, registering 11.7% growth from the Asia Pacific market, boosted by new routes, following the successful EU-China tourism year.

African routes expand

International travel grew by 7.5% in Africa, ranking #2. Growth was driven in large part by increased capacity and routes by Ethiopian Airlines, including new flights to New York from Abidjan,

Kenya Airways flights between Nairobi and New York, LATAM flights between Johannesburg and Sao Paulo and Royal Air Maroc between Casablanca and Boston and Miami.

Continued on page 2.

New airport terminal and changes in duty free ops announced for Asuncion

The Paraguayan government has announced a second terminal at Asuncion's Silvio Pettirossi International Airport that will increase the capacity of Paraguay's leading international gateway to more than 6m passengers. Current capacity is just over 1.5m passengers and the government is intent on promoting Asuncion as a regional hub.

Construction work is expected to begin in July of this year to be completed towards the end of 2022, according to DINAC, the Paraguayan Civil Aviation Authority. The construction tender will be launched via the International Civil Aviation Organization in Montreal as the Paraguayan government seeks greater transparency and endeavors to avoid criticism that has surrounded recent airport tenders.

More than \$200m will be invested in the new terminal and this will be funded from internal resources.

DINAC has also announced changes to the current duty free operation at the airport. At the moment three different operators, Mannah Duty Free, Golden Duty free and Luryx Duty Free - Top Brands (who acquired the Bright Star concession in 2017) fight for business in both arrival and departure stores. The current plan is to have one operator to operate all stores and TMI understands that a new tender is already under way.

John Gallagher



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ForwardKeys: International aviation to pick up growth in 1Q 2020 outlook

Continued from page 1.

International outbound travel from the Americas grew by 4.8%. Travel between countries in the region grew by 3.2%.

Most notable was growth in travel to other regions of the world, which was up 6.8%. This was helped by the continued strength of the dollar, new connections to many parts of the world and the recovery of Egypt and Turkey as destinations.

Outbound travel from Europe grew by 3.7%. Travel between European countries grew by 3.3% and travel to other continents grew by 5.5%.

Stronger bookings in 1Q

Looking to the future, the global picture is much more optimistic, and Africa is the stand-out market. As of January 1, international outbound bookings are ahead 12.5%, up 10.0% to other African countries and up 13.5% to the rest of the world.

Bookings to Africa from other continents are ahead by 12.9%.

The second most promising outbound market is Europe, with international forward bookings for the first quarter ahead by 10.5%. Bookings between European countries are ahead 9.6% and bookings to other continents are ahead 11.8%.

Asia Pacific is in third place, with international bookings ahead by 8.3%. Between countries within the region bookings are ahead 7.7% and long-haul bookings are ahead 9.7%.

The continued strength of the dollar appears to be a driver of what's happening in the Americas, where international flight bookings are 4.7% ahead. Bookings to other countries within the Americas are ahead by just 1.7% but ahead by 8.8% to other continents.

The travel outlook for the Middle East is starting to look up.

International first quarter, forward bookings are 2.2% ahead of where they were on January 1, 2019. Between countries within the region, bookings are ahead 6.8% but long-haul bookings are ahead by just 0.4%.

***Note: ForwardKeys' data pre-dates the assassination by the USA of Qasem Soleimani, an event which could alter the outlook for travel, particularly if the political situation deteriorates further.*

Olivier Ponti, VP Insights, ForwardKeys, concluded: "Travel in the first quarter of 2020 looks set to be buoyant, with long-haul travel showing notably stronger growth than intra-regional travel.

"This is encouraging news for the industry as the further people travel, the more they tend to spend."

TFWA opens new bureau in Shanghai

TFWA has strengthened its network in Asia with the opening of a new office in Shanghai.

The new facility is headed by Hannah Gao as TFWA's Chief Representative in China, and will enable TFWA to further develop its relations with key stakeholders and to promote its events within greater China.

Commenting on the move, TFWA President Alain Maignraud said: "It goes without saying that China is a vital market for us at TFWA, as it is for other organizations in the duty free and travel retail business. Hannah has excellent contacts among brands, retailers and airports, and she is well placed to help us to foster even closer relationships with our partners and clients in this all-important region.

"This new office will build on the excellent work done until now by Pierre Lequeux and his team at GLI. Pierre and GLI will continue to represent TFWA in Korea and South East Asia and we look forward to continuing our successful partnership."

Gao has over ten years of experience in the travel retail industry, and has assisted a number of companies looking to expand in the Chinese duty free market. She is fluent in both English and Chinese, and holds a Master's degree in integrated marketing communications from Beijing University.



London Supply raises \$700K+ at charity Golf Tournament

Argentine travel retailer London Supply has raised more than three-quarters of a million dollars from the 16th edition of its annual golf tournament, held at the beginning of January in the Uruguayan resort town of Punta del Este.

On top of the US\$781,479 originally raised, an additional \$400 was donated at the prize giving as one of the participants auctioned his prize at the award event.

The Golf Tournament continues to be one of the most important events of the Uruguay tourist season and the collaboration of the company's suppliers ensured another successful outcome.

The money raised will be channeled via the London Supply Foundation to support school dining programs in the Barrio Primero de Mayo Educational Complex in Puerto Iguazu and another 10 locations in different parts of Argentina.

Integral health programs will also be maintained for pupils in the educational establishments assisted by the Foundation.

In addition, the Foundation will continue with construction work at the Las Gaviotas Provincial School in Ushuaia in Tierra del Fuego, to give the school a permanent base.

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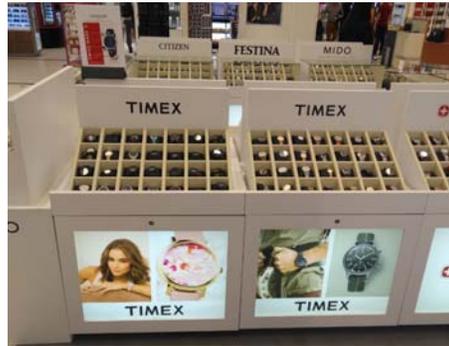
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Duty Free Dynamics launches Timex watches with Attenza



Panama-based Duty Free Dynamics announces that it has launched its Timex watches with Motta Internacional's Attenza Duty Free stores.

Working under its concept of master franchisor for the travel retail channel in the Americas, DFD has positioned the renowned watch brand in Attenza stores in four out of six of the countries where Attenza operates: Panama, Colombia, El Salvador and Ecuador.

Timex, a US-based brand established in Connecticut in 1845, is considered a trail-blazing clockmaker, producing iconic watch designs "for real people."

Timex has launched in the Attenza Duty Free stores (left) in San Salvador, El Salvador International Airport and in Ecuador at the (right) New International Airport Quito Mariscal Sucre as well as in Attenza stores in Colombia and in the Colon showroom in Panama.

Canadian land border duty free sales flat in first half 2018

Canada's land border duty free sales rose slightly in the first half of 2019, up 0.40% versus the same period in 2018, according to the latest figures revealed by the Frontier Duty Free Association.

Total land border duty free sales for the first six months of 2019 were \$64.7 million.

Alcoholic beverages and tobacco products continued to lead sales at land border duty free stores, accounting for 43.17% and 23.31% of total sales respectively. Tobacco sales were down across the country by 3.6% from H1 2018.

In contrast, alcoholic beverages sales continued to increase this year, up by nearly 2% from 2018 and increasing in percentage share of total sales both in eastern and western Canada. Total gross sales marginally increased in eastern (↑0.45%) and western Canada (↑0.24%) in H1 2018.

Canada's land border sales were impacted by a number of factors in the first half of 2018. More than 16 million travelers entered Canada in the first half of 2019 with 76.8% hailing from the United States.

Nearly 8.3 million of the U.S. visitors traveled by car to Canada, representing an increase of 2.5% from the first half of 2018.

International travelers spent \$10.2 billion compared to \$10.1 billion in H1 2018 due to an increase in spending by 10.7% from U.S. visitors.

Trips abroad by Canadians increased 1.0% in H1 2018, while trips to Canada by non-Canadians rose 0.5%.

PEOPLE & COMPANY NEWS

Cruise Lines International Association (CLIA) said that it is growing its European presence with the addition of **Julie Green** as vice president of Strategic Communications and the establishment of the soon-to-be-filled position of Director General.

Green joins CLIA from her position as Head of Corporate Communications for consulting firm WSP UK. Before that she served as Global Head of Communications for Bechtel Corporation's infrastructure business. Green will lead CLIA's strategic communications efforts in Europe. She will begin her tenure in London and transition to CLIA's office in Brussels beginning August 2020.

Marco Gadola has joined **Furla** as the new Head of Travel Retail, effective Jan. 13. He is based in Milan, Italy. Gadola comes to Furla from management positions in Luxottica and Desigual. He is replacing **Maria Giulia Agnoli**, who is moving to a new position in travel retail to be announced at a later date.

Mariela Castillo has joined **Swarovski** as District Manager Travel Retail - USA & Latin America. Castillo was previously TR Manager North America, Latin America & Caribbean with Furla, following nearly four years with Godiva.

Deluxe Americas has been appointed as the exclusive agent for **ASSOULINE** in Latin America and the Caribbean. ASSOULINE is an independent luxury book publisher, retailer and lifestyle brand founded in 1994 by **Prosper** and **Martine Assouline**.

Deluxe Americas, founded in 2018 by **Thierry Marteau**, is dedicated to bringing luxury retailers a new level of excellence. Deluxe Americas' portfolio also includes prestigious brands such as **La Table Hermès**, **L'Objet**, **Puiforcat** and **Saint-Louis**. www.deluxeamericas.com

Marmol & Son, LLC launches "Greener" Packaging

Marmol & Son, LLC, a small family-owned manufacturer of licensed fragrances for "Kids of ALL Ages" announces that it is taking a step in producing greener packaging and that all future productions of their fragrances will eliminate the transparent film overwrap commonly known as cellophane (cello).

"The use of cello is primarily for the protection of the product and is the first thing that is thrown away. It really has no other use," said David Marmol, VP at Marmol & Son.

"So, we will instead be using safety seals to prevent tampering on the top of the box. We will also be using collapsible bottom boxes, effectively reducing our use by almost 99%," he added.

Marmol estimates that this change alone will eliminate more than 400,000 square feet per year of cello clogging up landfills.

This is but a first step for Marmol & Son, which is studying other ways to reduce the amount of packaging and utilize more environmentally friendly ways of packaging its fragrances, says Marmol.

"We have always been focused on the quality of our fragrances and now we will also take into account the effect our packaging has on the environment. We challenge other fragrance companies to join us in making this a better, cleaner world for future generations!" he adds.

Marmol & Son has been designing and manufacturing fragrances since 2001, creating more than 150 designer fragrances under license for characters such as Batman, Superman, Harley Quinn, Wonder Woman, SpongeBob Squarepants and Dora the Explorer.



IWSR: Wine consumption in U.S. declines for first time in 25 years; Tito's upsets Smirnoff as #1 distilled spirit

For the first time in 25 years, total wine consumption in the U.S. decreased in 2019, posting a -0.9% volume loss versus 2018, according to preliminary figures released by IWSR Drinks Market Analysis.

For the fourth year in a row, beer volume in the U.S. was down (-2.3%), as was cider (-3.8%).

However, distilled spirits and ready-to-drink (RTD) products continued to post gains (+2.3% and +49.7%, respectively).

Despite decreases in the beer category, which represents the lion's share of alcohol sold in the U.S., total beverage alcohol in the country posted volume growth of 0.3% in 2019 (reversing a previous decline), with a value reaching \$167bn (up 2.5% from 2018).

Sparkling still shines

Sparkling wine grew almost 4% in the U.S. last year, but the larger still wine category dropped -1.5%, with the total wine category down -0.9%. The last volume loss in the category occurred in 1994, marking 24 years of growth before this most recent decline, and is attributed to changing generational habits.

Wine represents about 11% of the total beverage alcohol market in the U.S.

Tito's Ugly Sweater gets holiday Hoodie treatment

Tito's Handmade Vodka introduced a twist to its festive gift pack this season, the Tito's Ugly Hoodie.

The Tito's Ugly Hoodie follows two successful Ugly Sweater promotions, and was on bottles in travel retail markets around the world from Thanksgiving through the end of December.

The knitted hoodie design was adorned with festive snowflakes and fir trees and incorporates bottles, mule mugs and dogs, in a nod to Tito's *Vodka for Dog People* program.

Tito's Managing Director International, John McDonnell says: "We've had huge success with Tito's Ugly Sweaters. This season's distinctive Ugly Hoodie gift pack will not only create great displays in store, but also be in high demand for holiday party gifting around the world."

Change at the top

For the first time in over a decade, Smirnoff vodka is no longer the top-selling distilled spirit in America. Tito's Handmade Vodka, which increased in volume by over 20% in 2019, is now #1. (Vodka remains the largest spirit category by volume in the U.S.).

In total, spirits volume in the country grew by 2.3% last year, led by increases in mezcal (40%), Japanese whisky (23.1%), Irish whisky (8.6%), tequila (9.3%), U.S. whiskey (5.5%), and cognac (4%).

Ready-to-drink products are an \$8bn industry in the U.S., with volume that grew by almost 50% in 2019, thanks in large part to the tremendous popularity of hard seltzers (brands such as White Claw and Truly), which represent 43% of the total RTD category. Hard seltzer volume is currently about 82.5m nine-liter cases and forecasted to triple by 2023.

Beer once again showed a decline in the U.S. in 2019 (-2.3%). However, craft beer consumption increased last year by 4.1%, and low/no alcohol beer posted a gain of 6.6%. Imported beer increased 3.1%, while domestic beer dropped -3.6%.



Actress Emilia Clarke first Global Brand Ambassador for Clinique skincare & makeup

Clinique has tapped critically acclaimed actress Emilia Clarke as its first Global Brand Ambassador for skincare and makeup.

To celebrate the multi-faceted, empowered and optimistic Emilia Clark, the first skincare campaign is for the Clinique iD collection. The collection has added Clinique iD Dramatically Different Moisturizing BB-Gel and Clinique iD Dramatically Different Moisturizing Tone-Up Gel – the Clinique iD, and now delivers 17 unique combinations allowing consumers to create their own custom-blend moisturizer to hydrate and treat their unique skin concerns.

"Clinique has been a long-standing advocate for empowering woman with the knowledge that good skin can be created," says Jane Lauder, Global Brand President Clinique.

"We were drawn to Emilia because she is optimistic, happy in her skin and embodies a modern multi-faceted woman who is constantly evolving along with her skincare needs. She is also an authentic user and fan of Clinique, which was important to us. Emilia will lend her impactful voice to help inspire consumers to embrace their own unique skincare journey."

Emilia Clarke has garnered the attention of audiences worldwide for her pivotal performances in *Game of Thrones*, in a role that



garnered her four Emmy nominations and two Critics Choice nominations for her portrayal of Daenerys Targaryen, the Mother of Dragons.

In March 2019, after a personal health challenge - Clarke launched SAMEYOU, a charity aimed at revolutionizing recovery for young adults following brain injury and stroke.

Clarke can currently be seen starring in the romantic comedy, *Last Christmas*.

Launching January 15, 2020, Emilia will share her own unique skin care journey with the social campaign #iDYourself highlighting the Clinique iD collection - featuring the new Clinique iD Dramatically Different Moisturizing BB-Gel and Clinique iD Dramatically Different Moisturizing Tone-Up Gel.

Both are available in major airports, downtown and online duty free stores worldwide.

3Sixty CFO Philip Hancock joins IAADFS Board

Philip Hancock, CFO of 3Sixty Duty Free, has been appointed as a member of the Board of Directors of the International Association of Airport and Duty Free Stores (IAADFS).

Hancock joined 3Sixty in April 2017 as Chief Accounting Officer and was promoted to CFO in April 2018. In his role he helped position 3Sixty (formerly DFASS) for a collaboration with The Shilla Duty Free, who subscribed to a 44% equity position announced in late 2019.



Prior to 3Sixty, Hancock was VP of Finance North America at World Duty Free Group where he was responsible for building the accounting function and ultimately preparing the business for acquisition by Dufry. He is also a board member of Hand in Hand for Haiti.

TOMS

TRAVEL MARKETS
INSIDER

TOMS and Duty Free Dynamics “Stand for Tomorrow”

Shoe company TOMS has impacted more than 96.5 million lives, reports Duty Free Dynamics, TOMS’ distributor for the Caribbean travel retail market.

The company, which distributes a pair of shoes to people in need for every pair bought, has issued a comprehensive impact statement detailing its impressive charitable endeavors.

For the past 13 years, TOMS has been evolving a powerful business model that helps address need and advance health, education and economic opportunity for children and their communities around the world.

The brand has announced that it has reached the incredible number of 95 million TOMS pairs given to people in need in more than 85 countries and mainly in Kenya, India and Ethiopia.

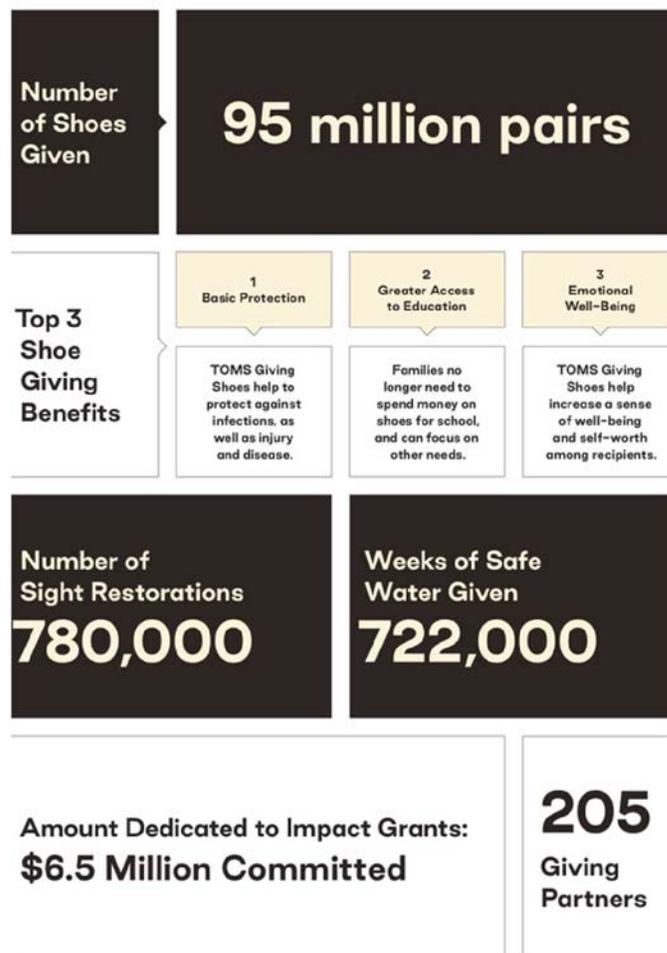
TOMS was established in 2006, when its founder, Blake Mycoskie, traveling in Argentina, noticed the difficulties faced by children growing up without shoes. So he created TOMS and its One for One concept: for each pair of shoes purchased, a second one is offered to a person in need.

In the following years, the brand also launched TOMS Eyewear in which for every pair of eyewear purchased, TOMS would help give sight to a person in need and TOMS Roasting Co. Coffee, in which for every purchase, TOMS provide 140 liters of safe water (a one week supply) to a person in need.

In the TOMS 2019 Global Impact Report, the brand indicates that it has helped restore the sight of 780,000 people and distributed 722,000 weeks of water.

Since last year TOMS has expanded its charitable mission to include four additional issues that affect millions of people globally called “Stand for tomorrow.” Under its “Pick your Style. Pick your Stand” shoppers choose their favorite style, then choose the issue they want to support, whether that’s giving shoes, ending gun violence, providing access to safe water, supporting equality, supporting mental health resources, or giving back to the homeless.

For more information, contact Gregory Secret, TOMS Brand Manager at DFD. gregory.secret@dutyfreedynamics.com



Viktor&Rolf take to the skies with new Flowerbomb Travel Exclusive Edition



Viktor&Rolf has revealed a travel retail exclusive extension from their best-selling Flowerbomb scent-- Flowerbomb In The Sky Limited Edition.

The company says that the fresh floral citrus version plays

on the strength of Flowerbomb’s original “explosion of thousands of flowers,” from the design duo who have become known as fashion and fragrance artists.

One of the three noses behind the seminal Flowerbomb original, perfumer Domitille Michalon-Bertier, IFF senior perfumer, worked with Viktor&Rolf to create Flowerbomb In The Sky Limited Edition. Notes of bergamot essence and mandarin essence create a brighter, lighter floral citrus scent.

Top notes feature Bergamot, Mandarin and Grapefruit; with a heart of Blackcurrant Bud Absolute, Lily of the Valley and Rose; and a base of white Sambac Jasmine Absolute and Patchouli.

The original Flowerbomb diamond-grenade bottle --holographic and dramatic --is now more faceted and comes in pink-blue hues, with the carton featuring the same pink-blue skies color palette.

Available in a 50ml version, this fragrance is ready to gift in an accompanying bag, customized to feature the skyline of the city they are in.

Look to the skies

Setting the scene at retail, Viktor&Rolf take inspiration from the surreal world of hot air ballooning.

Providing a sense of place, Flowerbomb In the Sky Limited Edition celebrates the landscapes and landmarks on each city skyline where the Limited Edition will be on offer; the views taken in during a hot air balloon’s drifting trajectory across the cityscape.

Flowerbomb In the Sky Limited Edition will be released in the UK from February 2020 followed by a roll-out to other Travel Retail regions later on.

EMPLOYMENT OPPORTUNITIES

**MARKET COORDINATOR**

Essence Corp has an immediate opening for a Market Coordinator. This position provides daily support in the department by ensuring high levels of communication and performance with internal and external customers.

The ideal candidate must be fluent in English & Spanish with an advanced level of Excel skills. Highly proficient in the ability to complete Sales Analysis and Forecasting Reports.

Responsibilities include but are not limited to key administrative tasks, order processing and customer support.

Must possess strong organizational skills, be a self-driven, team player, and have the ability to multi-task in a very fast paced environment.

Interested candidates may apply directly at <https://www.ziprecruiter.com/job/e4d598b6> or via email to musallan@essence-corp.com.

ACCOUNT EXECUTIVE

Essence Corp. has an immediate opening for an **Account Executive**.

The ideal candidate must have 2 years of retail sales experience preferably within the luxury brand industry.

Willing to travel 50% to 60% of the time.
Strong communication and presentation skills.
Team player with the ability to motivate sales.
Must be organized, detail oriented, and possess strong analytical skills.

This individual will be responsible for counters, beauty advisors, sell-outs and in store events and promotions. Coordinate the organization of travel schedule in conjunction with Area Managers.

Must have a high level of skills using Excel, PowerPoint and other MS Office applications.
Fluent in English and Spanish both written and oral.

Please apply at

<https://www.ziprecruiter.com/job/fe52dbb3>

or you can send your resume to musallan@essence-corp.com

ACCOUNT MANAGER

This role will oversee a defined territory in the Caribbean with quantitative and qualitative objectives to ensure the success of our brands.

The position reports directly to the Sales Director. The ideal candidate should be fluent in English & Spanish (French is a plus) with an advanced level of Excel skills. Must possess strong organizational skills, self-driven, team player, and the ability to multi-task in a very fast paced environment.

Interested candidates may apply directly at <https://www.ziprecruiter.com/job/ac8b20f1> or via email to musallan@essence-corp.com



Pernod Ricard
Global Travel Retail

Pernod research shows the importance of gifting in travel retail

Research conducted by Pernod Ricard Global Travel Retail (PRGTR) reiterates the importance of gifting as a purchase motivator in travel retail.

PRGTR conducts regular research into this area to ensure that regional and cultural nuances are reflected in the products offered and that it engages with its customers in the most effective ways possible.

The latest research shows that gifting is one of the largest shopping missions, centered not only around Christmas and Chinese New Year, but also Birthdays and other occasions too. These agendas are particularly common among Asian nationalities like the Chinese, Taiwanese and South Korean, but there is significant geographical differentiation when it comes their needs and desires.

Research shows that Chinese/Hong Kong Chinese, Japanese, Russian and German travelers are most likely to purchase gifts for their friends, while those traveling from Asian Pacific countries as well as those whom are Spanish, French, North and South American and South African are focused on buying gifts for their families. South Koreans, Taiwanese, Indian and Japanese travelers also look to purchase travel retail products for business gifting reasons.

PRGTR's research also shows that the usual 'treat yourself' mentality while shopping in duty free is another major duty free shopping driver in travel retail.

The choice of brand and the value of each gift brought by travelers depends on the recipient, the giver profile, the intent and the occasion, all of which are driving factors in the decision making process.

Anuj Roy, Strategy and Insights Director, Pernod Ricard Global Travel Retail comments; "Pernod Ricard Global Travel Retail and its brands focus on curating travel retail products that make the ideal gift, no matter the occasion, catering for different consumer buying behaviors worldwide. Recognizing that these habits are constantly evolving, it is important to conduct regular research in order to keep abreast of the latest trends and ensure our products are relevant and exciting for travelers, in turn ensuring that any product can be suitable for personal use or for gifting."



Retail Manager /Account Executive for North America - Southeast region

Shiseido Miami office is looking for a Retail Manager, based in Miami. Ideal candidate will have a minimum of 2-3 years experience in the Travel Retail luxury goods market.

Responsibilities include developing sell-out figures for its cosmetics and perfume brands through supervision of salespeople, implementation of the brands' merchandising and promotion guidelines.

Experience in retail sales is a plus.

Must be able to travel 40 to 50% of the time.

Applicants please send resumes to:
gcamplani@sac.shiseido.com