

# 2021 – Year of Recovery? Duty Free World Council

February 3<sup>rd</sup> 2021

DFWC: Protecting and promoting our industry



# Major Initiatives to Support the Industry

Joint call with ACI World for:

- temporary relaxation of travellers' duty free limits/allowances for selected duty free products to stimulate sales to help travel hubs/modes generate revenues from their retail partners, and...
- introduction of duty and tax-free shopping on arrival to level the playing field with countries which have already introduced D&TF arrivals shopping

Supported industry efforts to reverse decision on abolition of UK tax-free sales

Continued engagement with other global organisations in the aviation and maritime sector to highlight the critical role our industry plays in their financial models

Contributing retail sector view to development of passenger travel passes

# Re-opening borders safely

## Issue

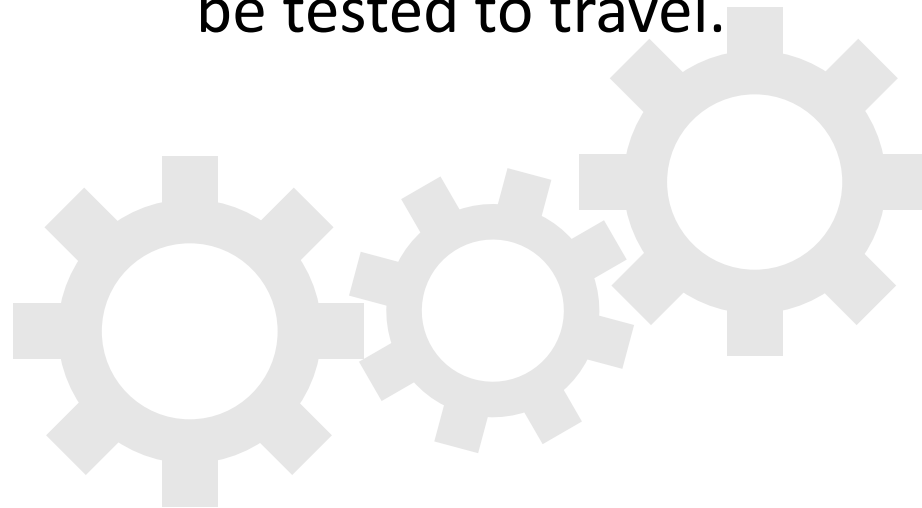
Governments need to be confident that they are mitigating the risk of importing COVID-19 to re-open borders without quarantine and restart aviation.

## Solution

Vaccination and testing are the most effective methods to achieve this. And while vaccination will take time, passengers are willing to be tested to travel.

## Confidence

But both passengers and governments need to have confidence in each passenger's verified COVID-19 status.



# The challenges

## **Passengers**

Need accurate information on test requirements, where they can get tested or vaccinated, and the means to securely convey test information to airlines and border authorities

## **Airlines**

Need to have the ability to provide accurate information to their passengers on test requirements and verify that a passenger meets the requirements for travel

## **Governments**

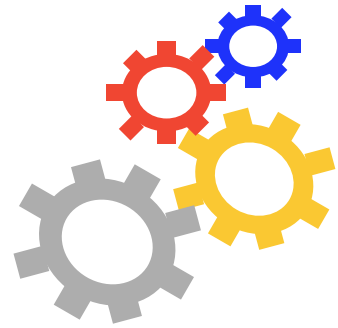
Need to be able to verify the authenticity of tests and the identity of those presenting the test certificates

## **Laboratories**

Need to be able to issue certificates that will be recognized by governments

# Solution: IATA Travel Pass

## Developed for everyone



### Registry of Health Requirements

powered by IATA Timatic

- Enables passengers to find accurate information on travel, testing (and eventually vaccine) requirements for their journey

### Registry of testing / vaccination centers

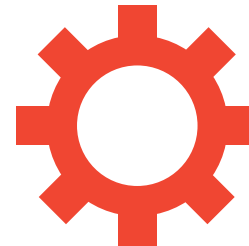
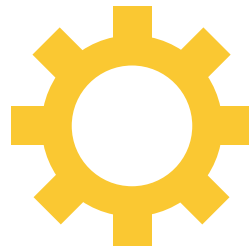
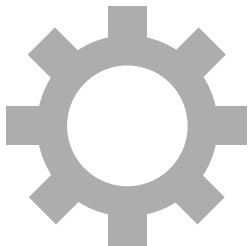
- Enables passengers to find testing centres and labs at their departure location which meet the standards for testing/vaccination requirements of their destination

### Lab App

- Enables authorized labs and test centers to securely send test results or vaccination certificates to passengers

### Contactless Travel App

- Enables passengers to (1) create a 'digital passport', (2) verify their test/vaccination meets the regulations & (3) shares test or vaccination certificates with authorities to facilitate travel.
- Can be used by travelers to manage travel documentation digitally and seamlessly throughout the travel experience.



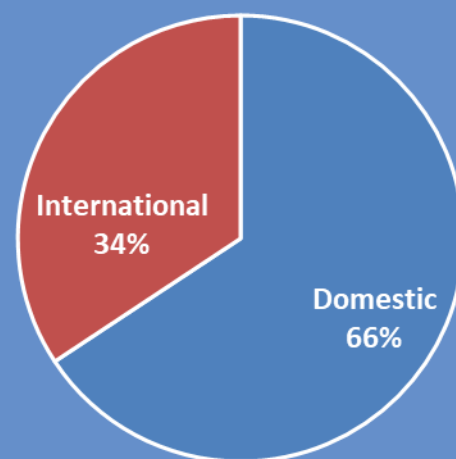
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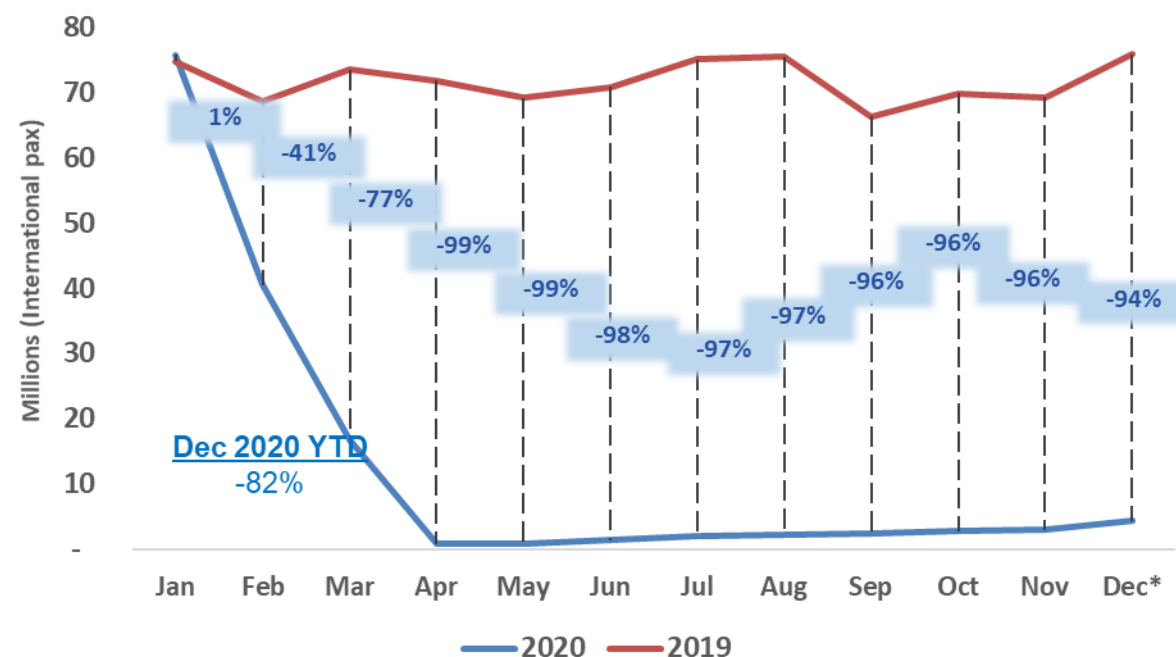


# Asia-Pacific – Historical pax



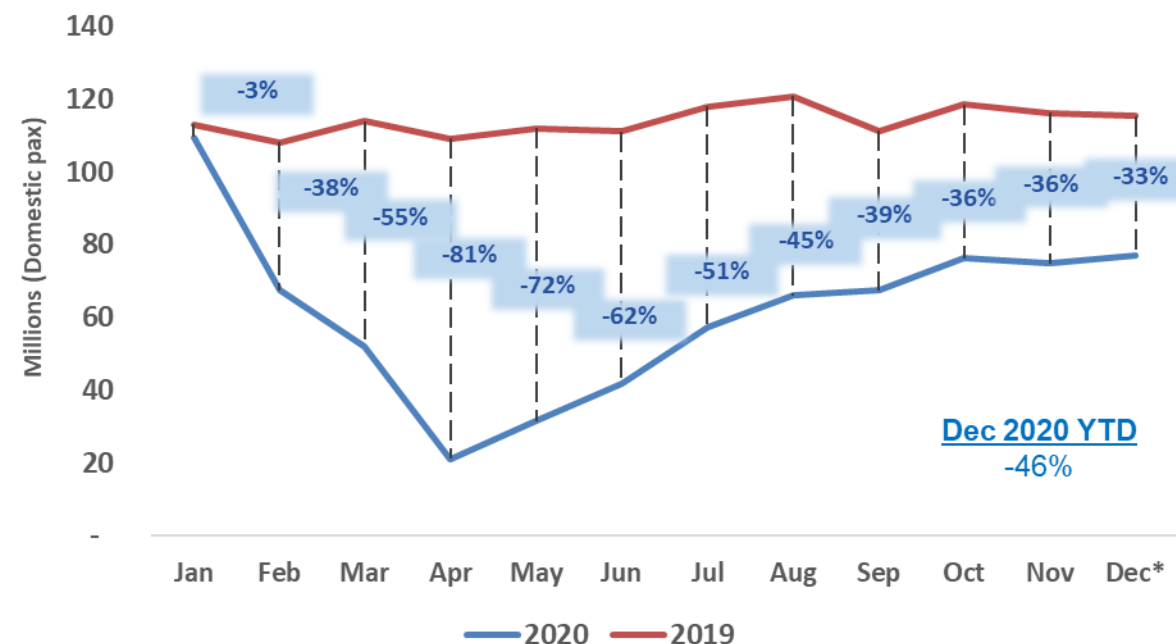
Source: ACI World, 2019

Intl.



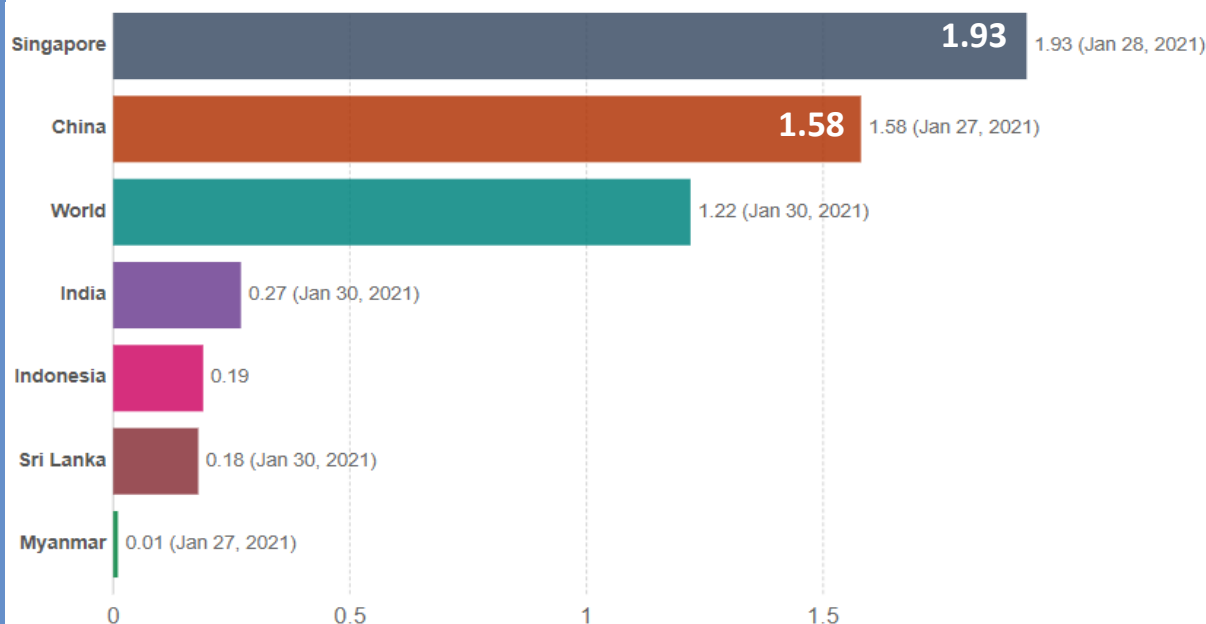
Dom.

	CAGR % 2009-2019	YOY% 2020/2019
Intl	8.4%	-82.3%
Dom	7.0%	-45.8%
Total	7.6%	-59.4%



# Asia-Pacific – Outlook 2021 and beyond

COVID-19 vaccine doses administered per 100 people, Jan 31, 2021



Source: Official data collated by Our World in Data – Last updated 31 January, 20:10 (London time) OurWorldInData.org/coronavirus • CC BY

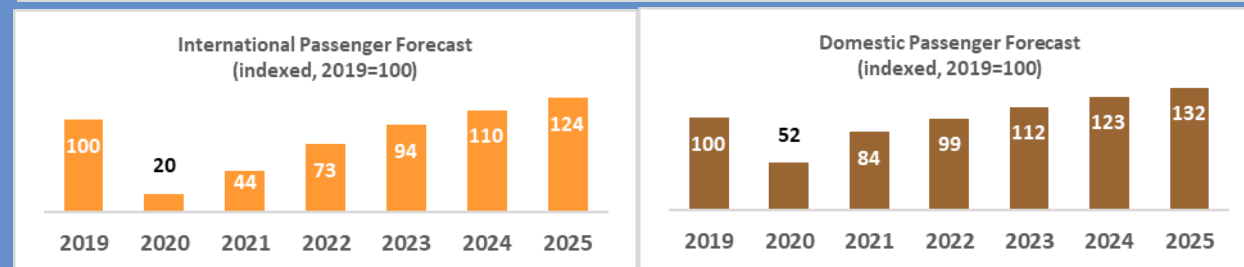
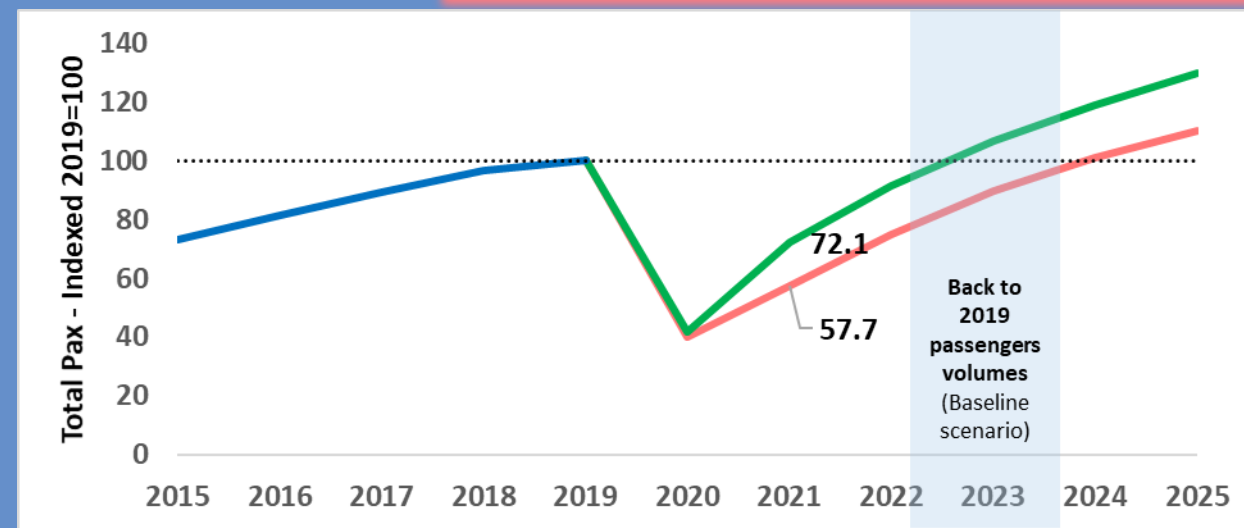
- India and Indonesia currently at 13K+ cases per day
- Multiple vaccines (6+) approved for emergency use in Asia
- Urban areas in China and India likely to achieve herd immunity before rural areas opening the doors for travel bubbles

## Baseline scenario – 2023 return

- Effective vaccine(s) mostly distributed throughout 2021
- Strong rebound in pax confidence and airlines fleet recovery

## Low scenario – 2024 return

- Effective vaccine(s) in 2021 but complex supply chain requirements (cold chain)
- Limited vaccine supply with new variants
- Fear of traveling still present
- Prolonged economic downturn
- Slow airline fleet recovery



# Overview current situation: Asia Pacific

- Japan - expanded **Covid-19 state of emergency and suspended fast-track business travel permits**, ie: **banning foreign visitors**.
- Hong Kong have **increased their quarantine to 21 days** and increased testing of mass residential areas, and extended the ban for travellers coming from UK and S Africa, The green lane between HK and Singapore is on hold.
- Singapore Health Minister, Gan Kim Yong said international travel will not revert to normal even after Singaporeans are vaccinated. The reciprocal green lane (RGL) arrangements with Malaysia, Germany, South Korea are suspended 3 months from 1 Feb 2021
- Philippines extended **travel ban until 31 Jan**, travellers from **Singapore, US, UK, Hong Kong, Japan, Australia, France, SA, Germany, South Korea and China**.
- Indonesia's chief economic minister announced on 11 January that the country will **extend its ban on foreign arrivals, and review at end of January 2021**
- Vietnam has **banned travellers from U.K. and South Africa** It will also **limit flights** bringing citizens home until the end of the CNY.
- China implements **once again aggressive measures to curb a resurgence** of the disease and they report drooping numbers

## TRAVEL BUBBLES

- Australia reopened its **one-way travel bubble** with N. Zealand on 31Jan, with new screening measures. New Zealand government still plans to establish a **trans-Tasman travel "bubble" by April**, and Fiji's tourism sector is calling for the New Zealand Government to start taking travel bubble plans, no confirmation as yet.
- New Zealand and **Cook Islands** has **agreed to a one-way travel bubble**. Travellers can start quarantine-free travel to New Zealand
- Sri Lanka will **reopen its borders to foreign tourists**. Health Ministry has approved a comprehensive set of guidelines to resume international tourism. From 23 Jan 2021, borders were opened. The new guidelines include mandatory Covid-19 insurance cover for one-month worth and govt certified hotels only, but no quarantine.

## What's Next? The Race for Vaccine & Mass Inoculation

- Governments started announcing vaccine plans, China, India, Australia, Singapore, started vaccinating but some countries are less vocal on their vaccine dates such as New Zealand, S. Korea, Japan.
- China Supports other SE Asia Countries with vaccine donations to boost regional recovery. First donations sent to Philippines receive half million doses, Cambodia receives one million doses, Myanmar set to receive 300,000 vaccine doses
- India plans to offer 20million doses to neighbours Nepal, Bangladesh, Sri Lanka, Afghanistan, Seychelles and Mauritius.
- **IATA Travel Pass** - Registry Health Requirements – Registry of Testing - Test & Vaccine Certification Results – Travel App

## MEASURING REGULATORY THREATS

ASIA PACIFIC  
TRAVEL RETAIL  
ASSOCIATION

In developing this report, we have taken each regulatory threat and qualified it with a point-system (i.e. 1 to 4) where each point denotes the stage of policy development. As a result, the heatmap shows not only the quantity of issues but also by the levels at which an issue is unfolding and its potential impact (i.e. 'heat') on the industry.



## Important APTRA Reports for Members

### 1. **APTRA Covid-19 Regional Report Update** *Published every month*

offers a summary view to APAC borders re-opening or changes, if any "green lanes" for travel have emerged and if any relief measures have been announced

### 2. **APTRA Advocacy Report & Heat Map** *Published Quarterly*

This quarterly report identifies key aspects of regulatory challenges spanning across Asia Pacific. Its purpose is to raise the awareness of legislative changes, to document the advocacy challenges we are facing as an industry

**Hainan** - Jan 1 2021 Holiday - 200% increase YoY.  
**Chinese New Year 2021** – Average spend still anticipated to grow, but given new travel restrictions, data from Forward Keys predicted that domestic movement may not be as high as previous years. From provinces such as Guangdong, Jiangsu and Sichuan and then Beijing. CNN reported an approx. 74% less than a normal CNY movement

# Major Initiatives to Support the Industry

## 1. APTRA - advocating for aligned unified travel and quarantine protocols across Asia Pacific

As travel movement had started to emerge we noticed the different approaches, differences in testing requirements, quarantine days, planned and pre submission of itinerary and entry permits creating confusion and an extremely prohibitive environment for any type of travel.

- APTRA launched a campaign & Industry positioning paper
- Aligned forces with other regional associations to launch joint campaign *aviation, airline, tourism, travel retail as one appeal and one common voice.*

## 2. APTRA – appeals for delays in regulation implementation dates (particular on tobacco)

- Regulations that were already sited and designed to be implemented across tobacco
- APTRA is currently running campaigns to appeal for
  - delays of implementation date
  - co-existence of old and new tobacco packaging on shelves
  - clarity on potential widening of parameters given the current crisis

*Typically the regulation is around change in graphic health warnings, warnings in the local language, new plain packaging rules. We appealed on several occasions across countries such as Vietnam, Taiwan, Philippines, S Korea, and now Malaysia.*

## What have we learned in 2020?

- Governments are working in isolation
- Governments do want to open borders back up
- The government stakeholder that TR usually liaises with has changed.

## What's Next? Opportunities to review duty free restrictions & allowances

- Can we appeal for remove DF restrictions / increase allowances given the state of trade
- We are currenting working with groups within our membership to discuss and review



### ALIGNED REGION WIDE COVID-19 HEALTH PROTOCOLS FOR TRAVEL

The global pandemic has crippled the growth of the travel industry as governments introduce strict border closures and travel bans worldwide resulting in a plunge in travel demand to near non-existent levels. Revised OECD estimates on the COVID-19 impact point to 60% decline in international tourism in 2020. This could rise to 80% if recovery is delayed until December<sup>1</sup>. Although governments around the world have been making moves to reopen borders and stimulate air travel, a greater coordinated effort is required to revive the ailing tourism economy.

The Asia Pacific Travel Retail Association (APTRA) supports the safe return to travel, particularly in line with consistent guidelines across the region, and calls for a coordinated approach by governments in the region to establish such guidelines in order to support a return to travel in the Asia-Pacific region.



### Open Letter to Asia-Pacific Ministers of Health, Transport, Tourism, Interior, and Foreign Affairs to Adopt ICAO Risk Assessment and Testing Framework in lieu of quarantine

As the collective voice representing the tourism, airline, airport and the travel retail sectors in the Asia-Pacific region, we respectfully call upon your Ministry/Authority to fully implement the



15 October 2020

Yujin Chung  
Bureau of Healthcare Policy  
13, Dorn 4-ro, Sejong  
(30113) Korea  
(via email: [morningcalm@korea.kr](mailto:morningcalm@korea.kr))

### Request for deadline extension: Compliance to new tobacco graphic health warnings in South Korea

Dear Sir / Madam,

I write on behalf of the Asia Pacific Travel Retail Association (APTRA), the industry association representing the interests of the Duty Free and Travel Retail industry in Asia Pacific to request an extension of the deadlines related to the introduction of new graphic health warnings (GHW) for all tobacco product packaging sold in South Korea. This is scheduled to begin at the end of this year.

Our industry has been advised that products with the current GHW can be imported and should therefore leave the customs bonded warehouse by 22 December 2020. These products may then be sold to retailers by 22 June 2021.

The Covid-19 pandemic has brought our industry to a standstill. Prior to the global crisis, the Asia Pacific region had been a key driver for global duty free and travel retail revenue, accounting for 45% of global duty free sales. South Korea is a significant market leader for our industry with close to 20% of global sales, supporting GDP and jobs domestically.

We appreciate the grace period that allows both old and new graphics at the distributor warehouses between December 2020 and June 2021. However, our members face the prospect of having to destroy a significant volume of stock with the old graphic health warnings. Uncertainties in the travel landscape limit our members' ability to sell through their existing stock prior to December 2020. And this change may cause further loss of revenue on top of this devastating year of trade.

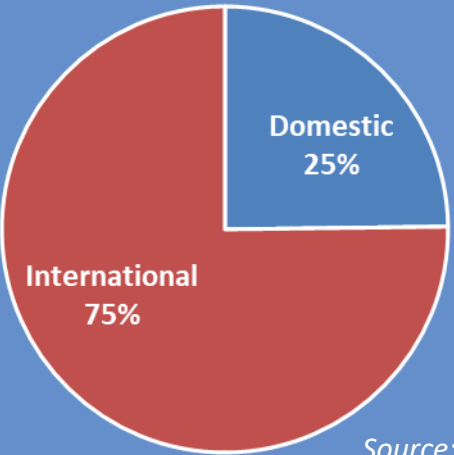
We therefore humbly request consulting with the **Ministry of Health & Welfare** to grant the following:

i) A six month extension for the importation of Duty Free products with old GHW until 22 June 2021



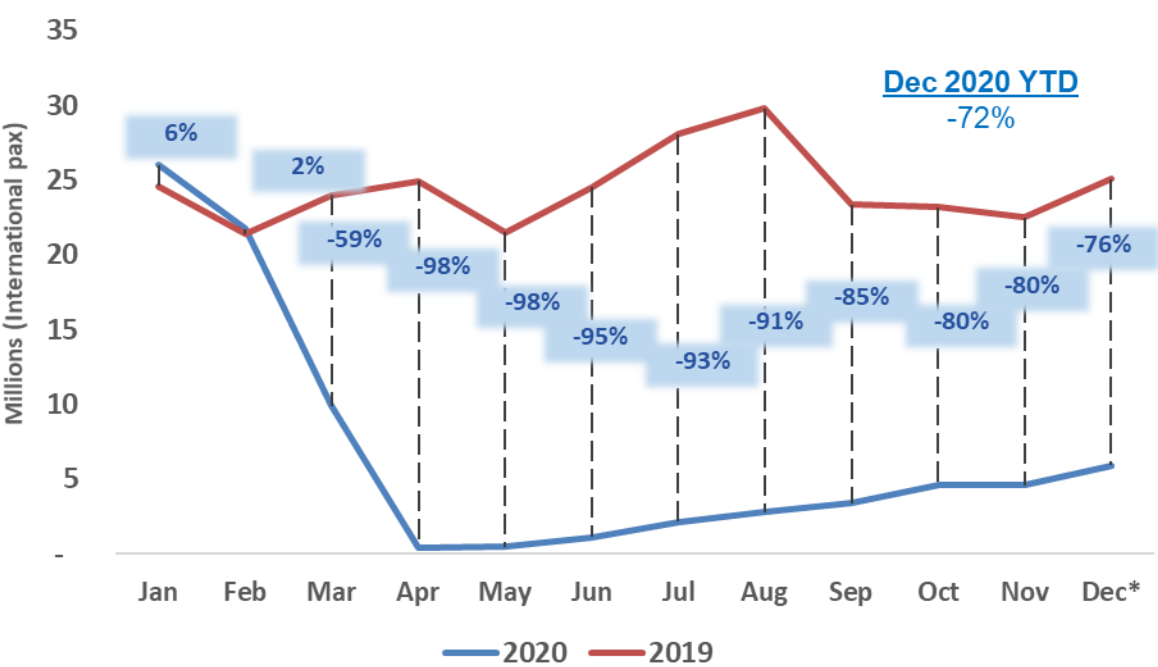
ASIA  
PACIFIC  
TRAVEL  
RETAIL  
ASSOCIATION

# Middle East – Historical pax

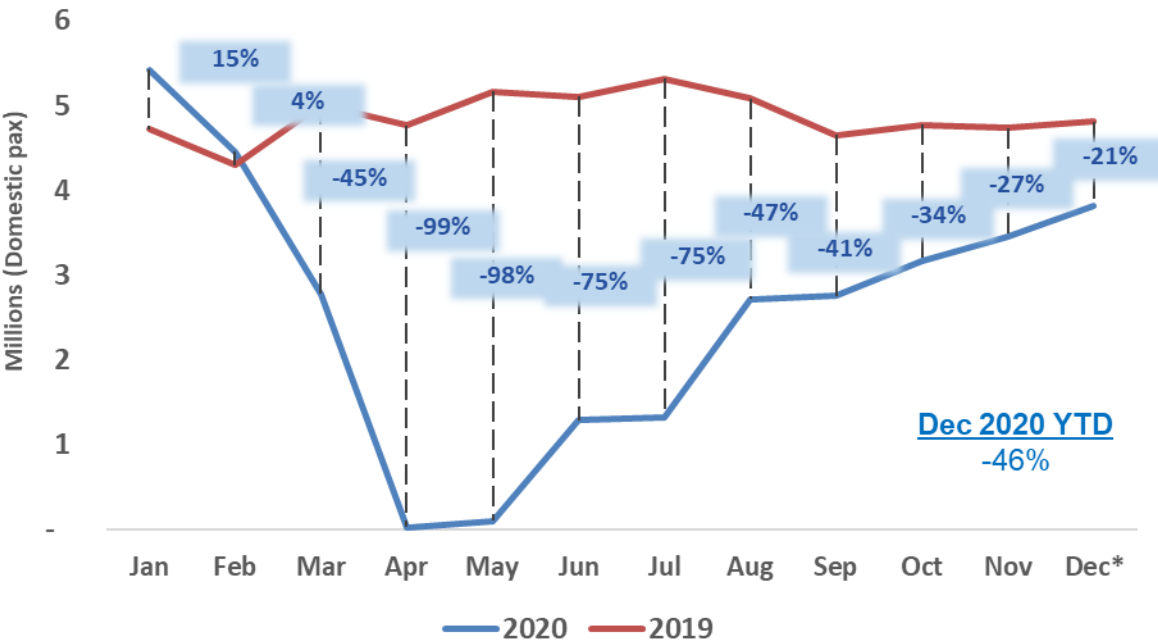


Source: ACI World, 2019

Intl.

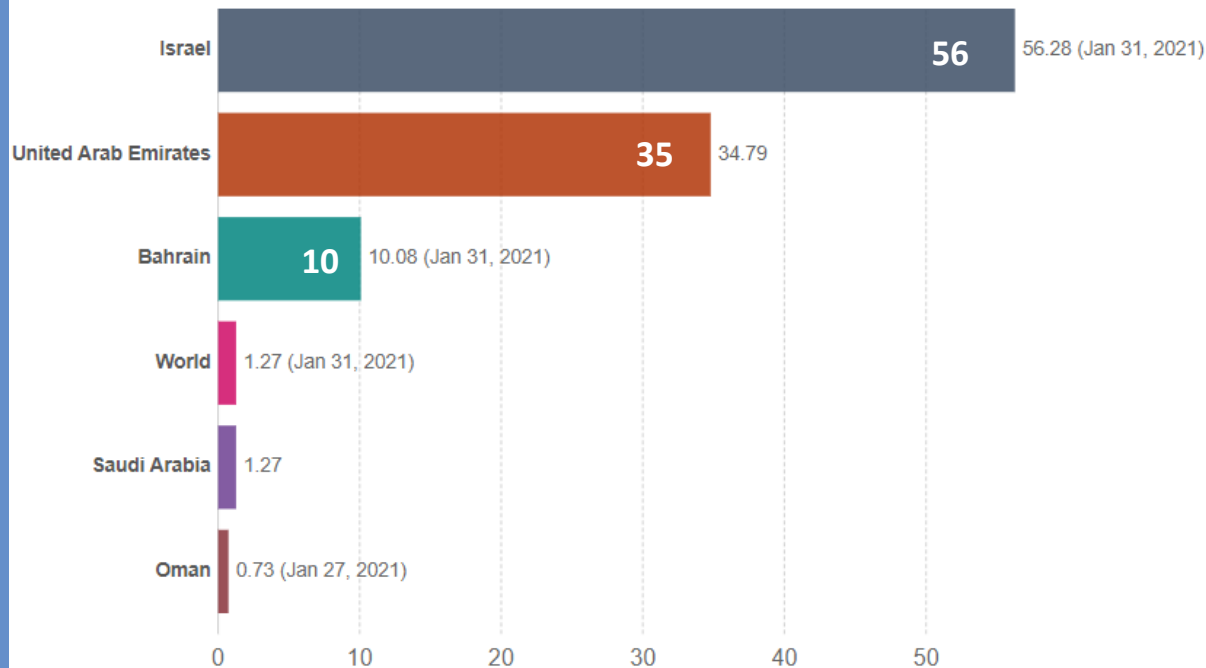


Dom.



# Middle East– Outlook 2021 and beyond

COVID-19 vaccine doses administered per 100 people, Jan 31, 2021



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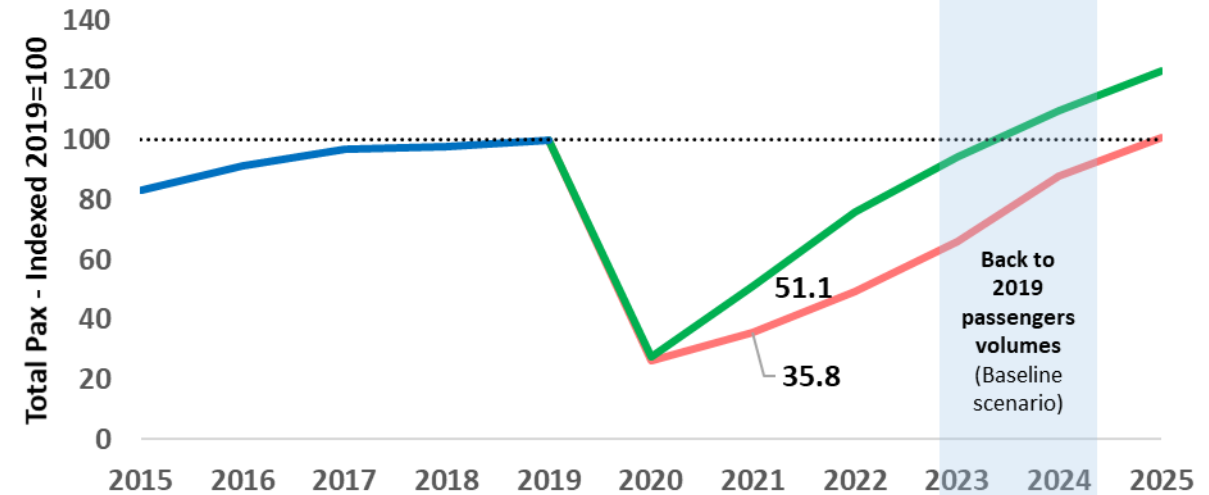
- Most new cases currently recorded in Iran (6.3K+ daily), Israel (4.5K+ daily) and UAE (3.5K+ daily)
- Israel and UAE have the most doses per 100 person administered worldwide (by far)
- UAE as multiple vaccines approved:
  - Sinopharm
  - Pfizer
  - Sputnik V

## Baseline scenario – 2023-2024 return

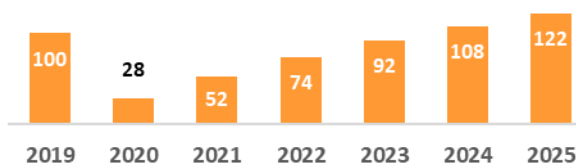
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## Low scenario – 2025 return

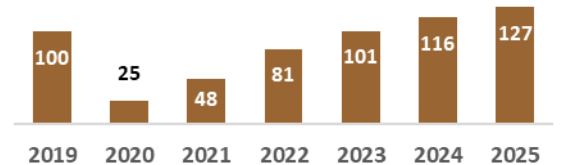
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International Passenger Forecast (indexed, 2019=100)



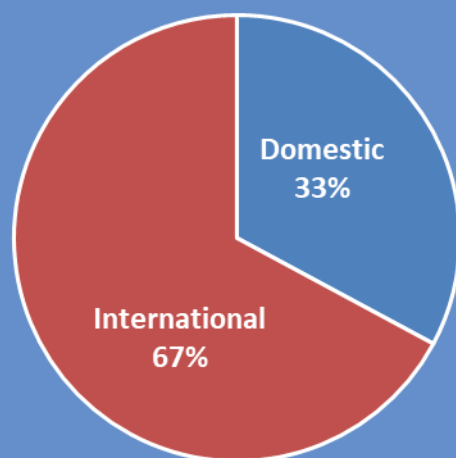
Domestic Passenger Forecast (indexed, 2019=100)



Source: ACI World

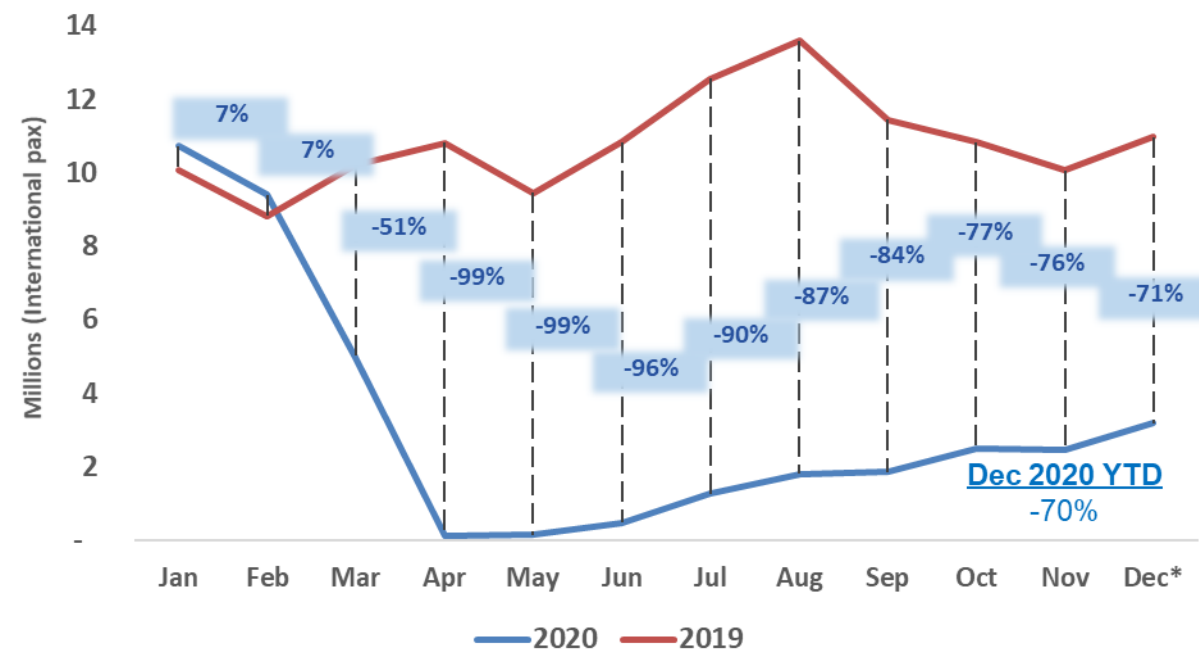


# Africa– Historical pax

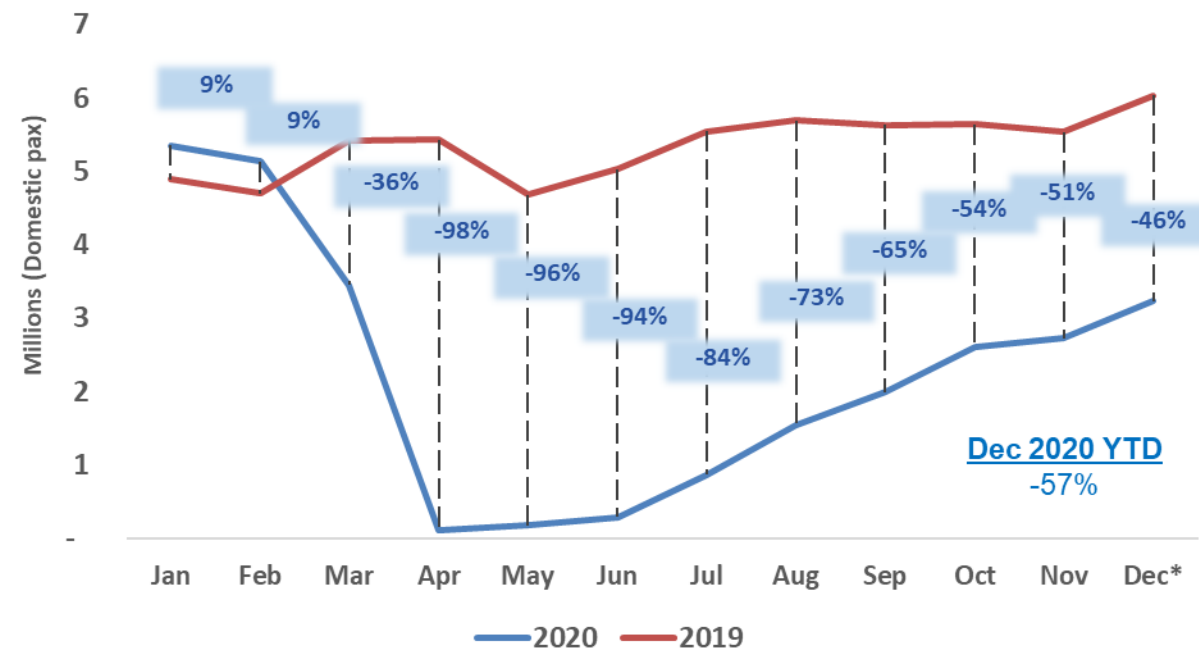


Source: ACI World, 2019

Intl.



Dom.



	CAGR % 2009-2019	YOY% 2020/2019
Intl	4.4%	-70.1%
Dom	3.0%	-57.2%
Total	3.9%	-66.2%

# Africa – Outlook 2021 and beyond

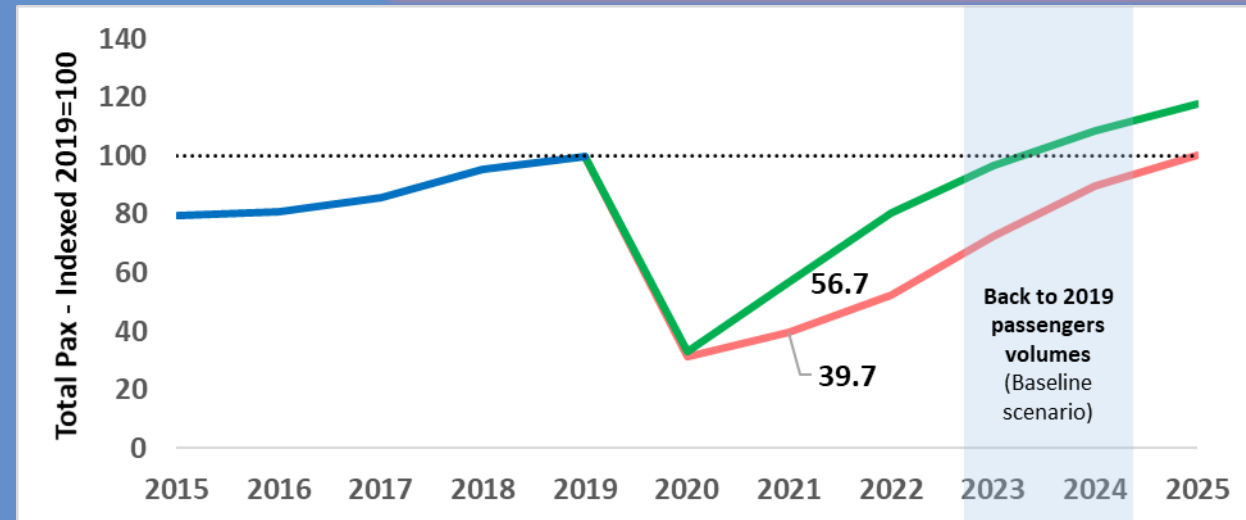
- On a relative scale – least impacted region (for now) by the pandemic
- Limited data on number of cases (South Africa worst hit country with over 1.4M cases)
- Very limited data on vaccination campaign in Africa
- Vaccines Global Access (COVAX) initiative: WHO and CEPI GAVI
  - Goal: supporting the building of manufacturing capabilities, and buying supply, ahead of time so that 2 billion doses can be fairly distributed by the end of 2021
- Likely to be the last continent to achieve herd immunity

## Baseline scenario – 2023 return

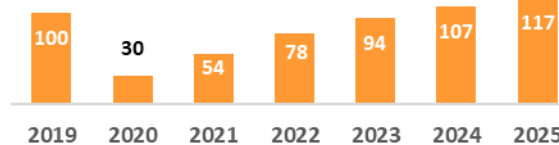
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## Low scenario – 2025 return

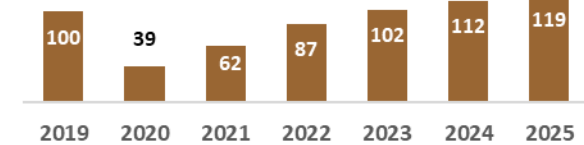
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International Passenger Forecast  
(indexed, 2019=100)



Domestic Passenger Forecast  
(indexed, 2019=100)



# Overview of current situation in the Middle East & Africa

**Covid-19 has spread to most of the globe, with over 99 million confirmed cases and over 2.1 million deaths as of 25 January 2021.**

- **Africa** cumulative cases topped 3 million, an average of 25k daily cases were reported between Dec 2020 and Jan 2021 – 39% higher than July peak
- Over 5m cases in the **Middle East** as of Jan 24 2021

**And it is getting worse with the emerging variant of the virus**

**Flights have restarted** in some countries like South Africa, Namibia, Zimbabwe, Congo, Kenya, Ghana, Jordan, Iraq, Iran, Egypt

**Flights are suspended** in some other countries like Oman, Libya, Tunisia, Morocco, KSA, Nigeria

**Strict travel restriction measures are applicable in major countries:**

- suspension of visa upon arrival in some countries
- medical certificate with negative PCR test result issued at least 72 hours prior to arrival
- quarantine or self isolation for at least 7 days in some countries
- traveller health questionnaire must be presented on arrival



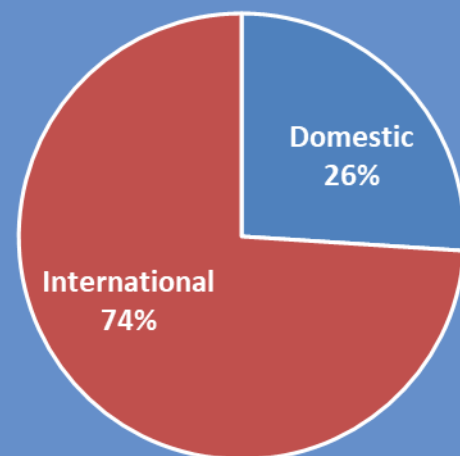
# Overview of major initiatives to win support for the industry

## MEADFA Advocacy Working Group engagement activities in Middle East and Africa

- Engagement with political authorities requesting financial support from governments
- Landlords engagement requesting rent relief strategy to support retailers
- Issued monthly report on covid-19 related measures in Africa and Middle East
- Shared global rules on airport operations decided by ICAO with local implementation
- MEADFA has influenced the cart (Council Aviation Recovery Taskforce) with DFWC to support the reopening of airport shops
- Engaged with ICAO offices in Cairo, Nairobi and Dakar, the engagement was promising
- Support of ACI Africa on best practices re duty free & travel retail
- Supported successful engagement with General Civil Aviation Authority in UAE

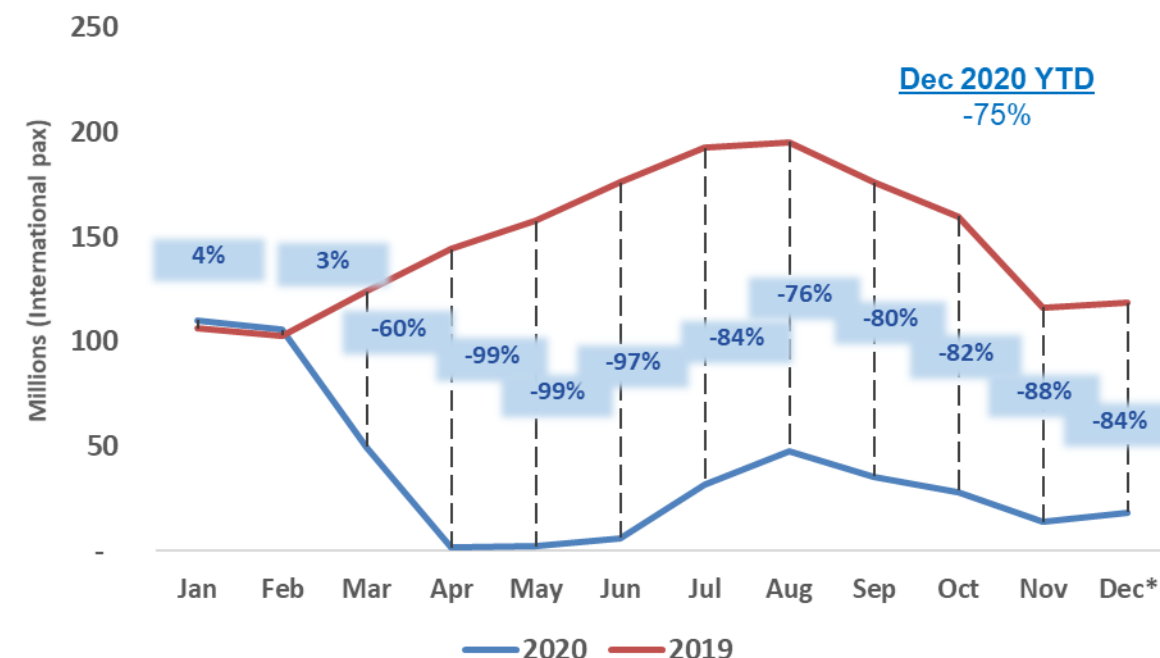


# Europe – Historical pax



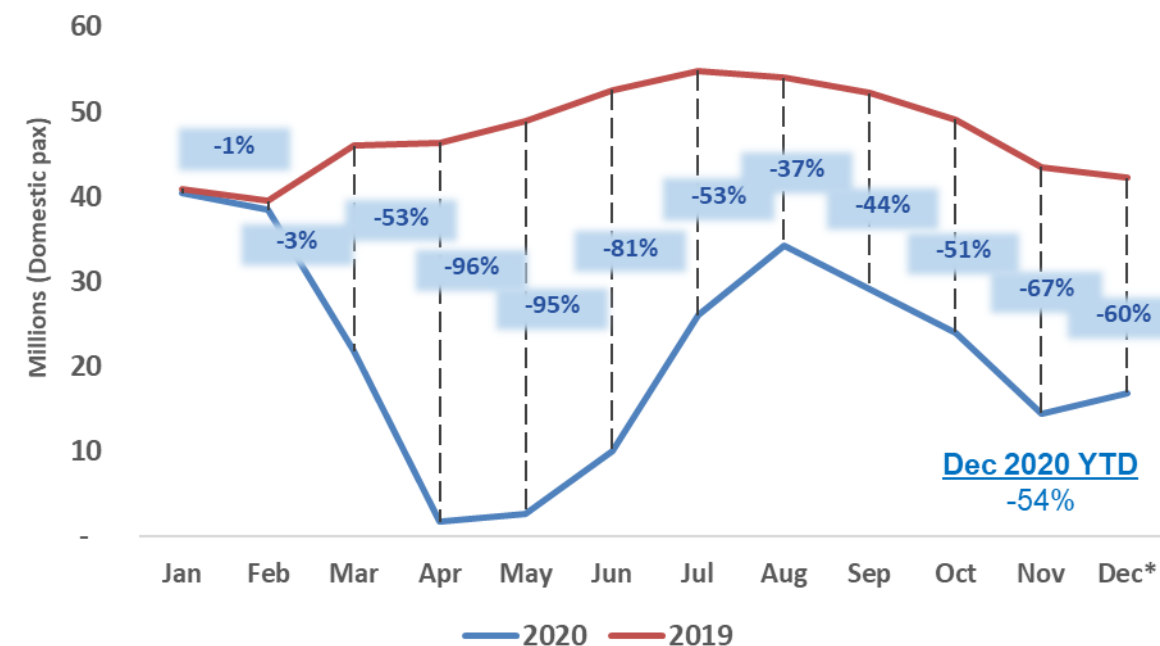
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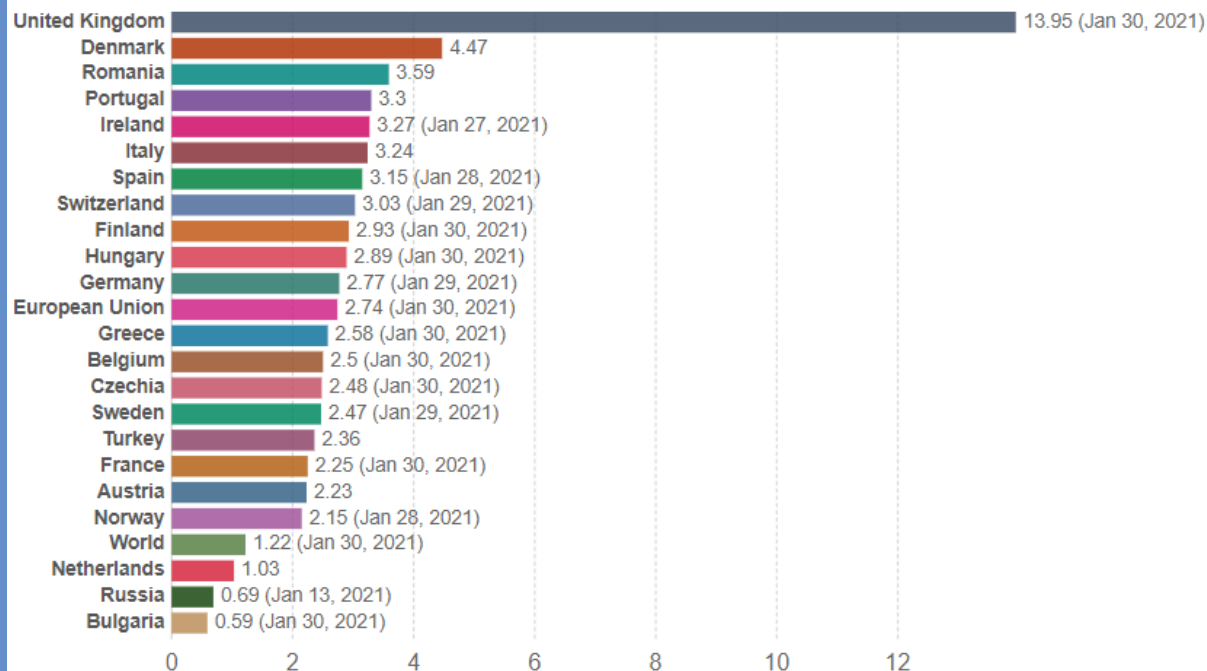
	CAGR % 2009-2019	YOY% 2020/2019
Intl	5.6%	-74.6%
Dom	3.1%	-54.5%
Total	5.0%	-69.7%



Source: ACI World, \* Estimate

# Europe – Outlook 2021 and beyond

COVID-19 vaccine doses administered per 100 people, Jan 31, 2021



Source: Official data collated by Our World in Data – Last updated 1 February, 09:40 (London time) OurWorldInData.org/coronavirus • CC BY

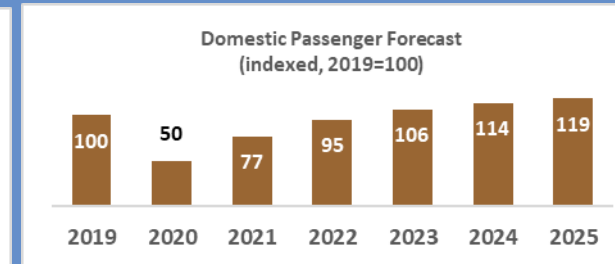
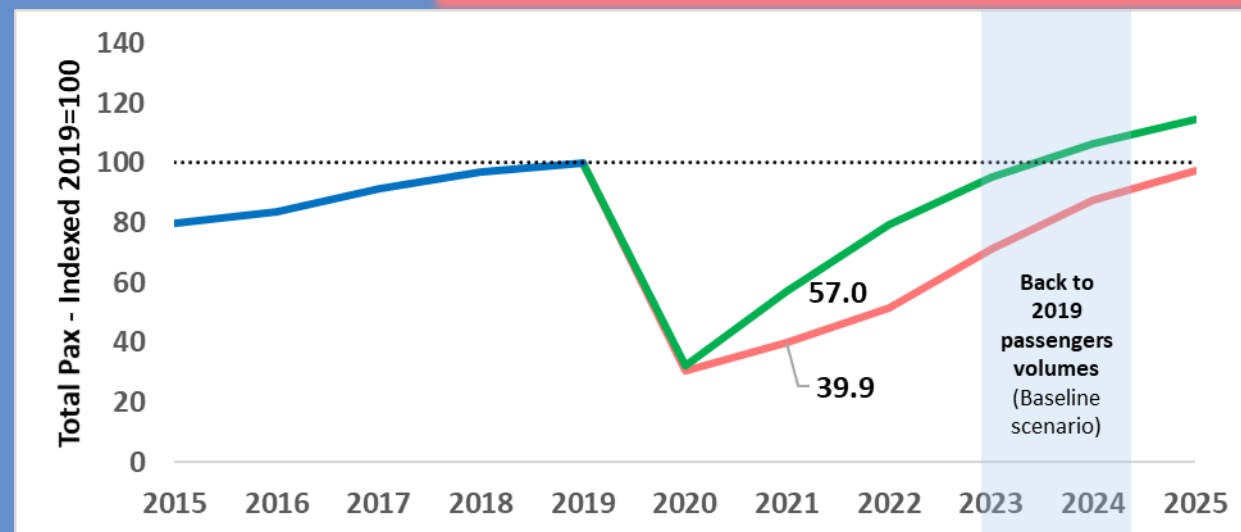
- Many countries currently at 20K+ cases per day
- Rough start for many vaccination campaigns but improvements seen recently
- Strong anti-vaccine movement in France and other countries
- Herd immunity likely in late Summer in Western Europe and late 2021 for the rest of Europe

## Baseline scenario – 2024 return

- Effective vaccine(s) mostly distributed throughout 2021
- Strong rebound in pax confidence and airlines fleet recovery

## Low scenario – 2025/2026 return

- Effective vaccine(s) in 2021 but complex supply chain requirements (cold chain)
- Limited vaccine supply with new variants
- Fear of traveling still present
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- Slow airline fleet recovery



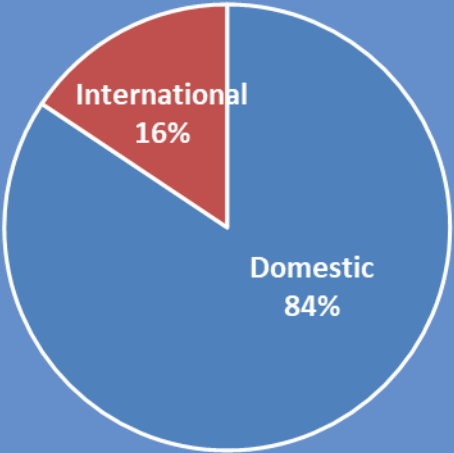
# Overview of current situation in Europe

- ‘Third wave’ in many European countries resulting in a number of **restrictions across the European continent**, from full lockdowns to curfews
- Common rules under consideration for **travel from outside the EU**:
  - Stricter measures to address virus variants of concern (quarantine, extra tests)
  - Mandatory negative test at least 72h before departure
  - Common European Passenger Locator Form
  - Some measures already in place in some countries, also for intra-EU travel
- **UK** to impose hotel quarantine for travellers arriving from 22 ‘red list’ countries
- **Vaccination** roll-out has started across the continent but at slow pace
  - EU: Objective of 70% of adult population vaccinated by this summer
- **2021: A game of two halves for Travel Retail**:
  - Q1 still difficult, slow recovery from Q2
  - Hope for strong H2 as fundamentals for our business are there, with eagerness for travel and increased SPP in 2020

# Overview of major initiatives to win support for the industry

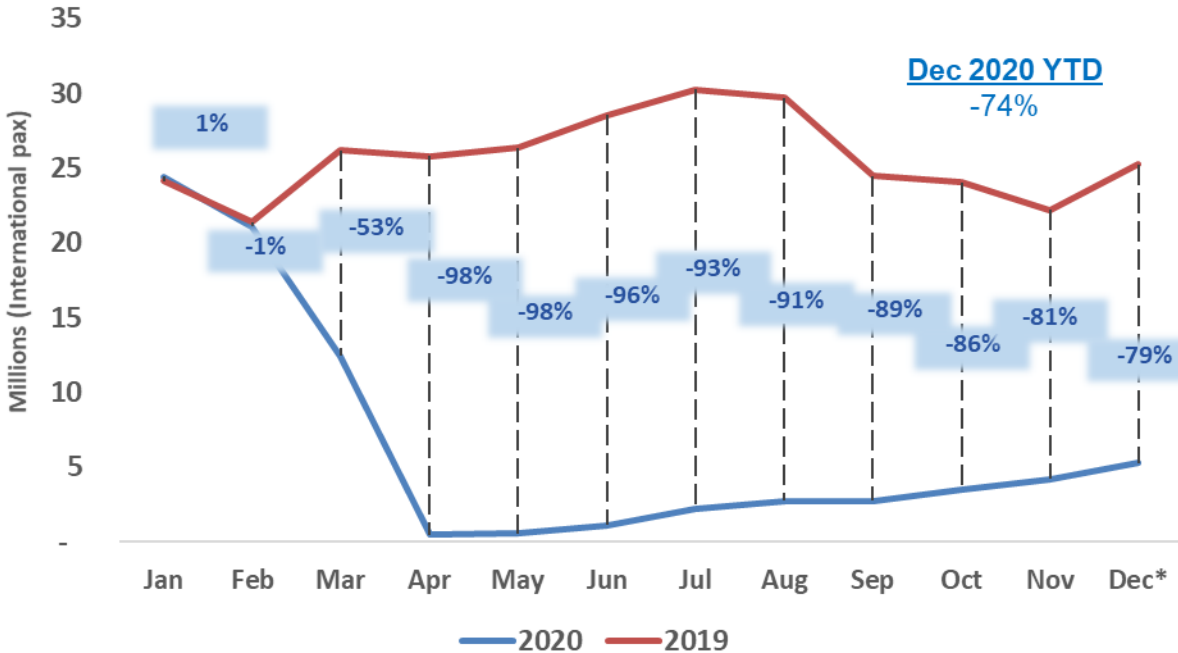
- Sept 2020: ETRC co-sign **open letter** to Ursula von der Leyen, President, European Commission asking for end of quarantines and develop common EU Testing Protocol
- Sept 2020: ETRC/ACI EUROPE **letters** asking for support and for Arrivals Duty Free to:
  - EU Commissioner for Economy and Taxation Paolo Gentiloni
  - EU Commissioner for Transport Adina Valean
  - EU27 governments (Finance and Transport ministers)
- Oct 2020: Virtual Launch of **ETRC report** "The Economic Impact of Arrivals Duty and Tax Free Shopping in the EU" by York Aviation
- Nov 2020: ETRC cosign **Round Table Report on the Recovery of European Aviation** which includes recommendation for Arrivals shopping in the EU
- Nov 2020 – Jan 2021: ETRC **meetings** with EU Commission and EU Member States
  - EU Director General for Transport Henrik Hololei
  - EU Director General for Taxation and Customs Gerassimos Thomas
  - National associations and/or ETRC meetings with governments

# North America– Historical pax



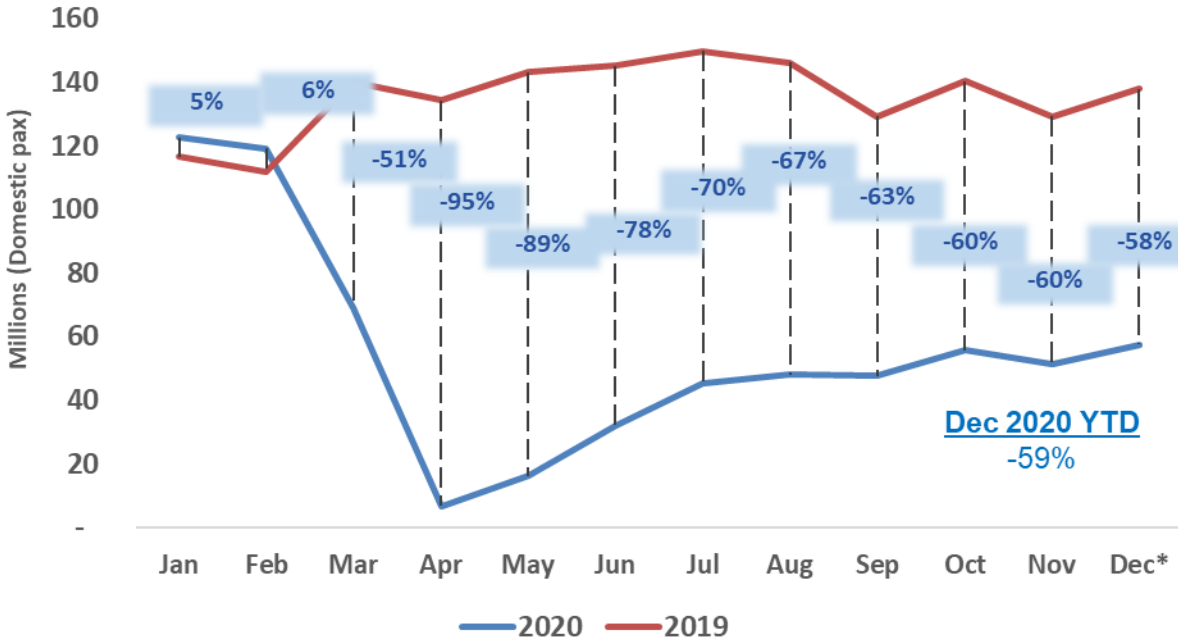
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Intl.



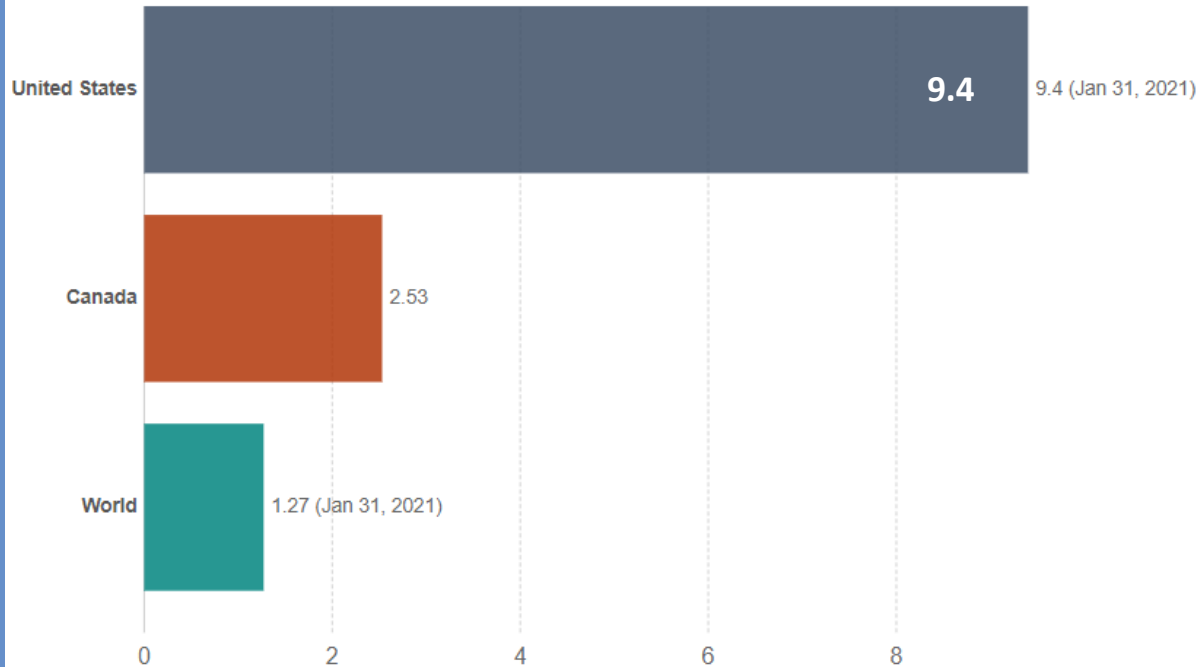
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Dom	2.8%	-58.7%
Total	3.1%	-61.1%

Dom.



# North America– Outlook 2021 and beyond

COVID-19 vaccine doses administered per 100 people, Jan 31, 2021



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- USA still recorded over 150,000+ cases per day on average
- Biden administration pledged for over 100M doses in 100 days. Current daily vaccination rate is at or above 1M doses.

## Herd immunity

USA => Summer 21

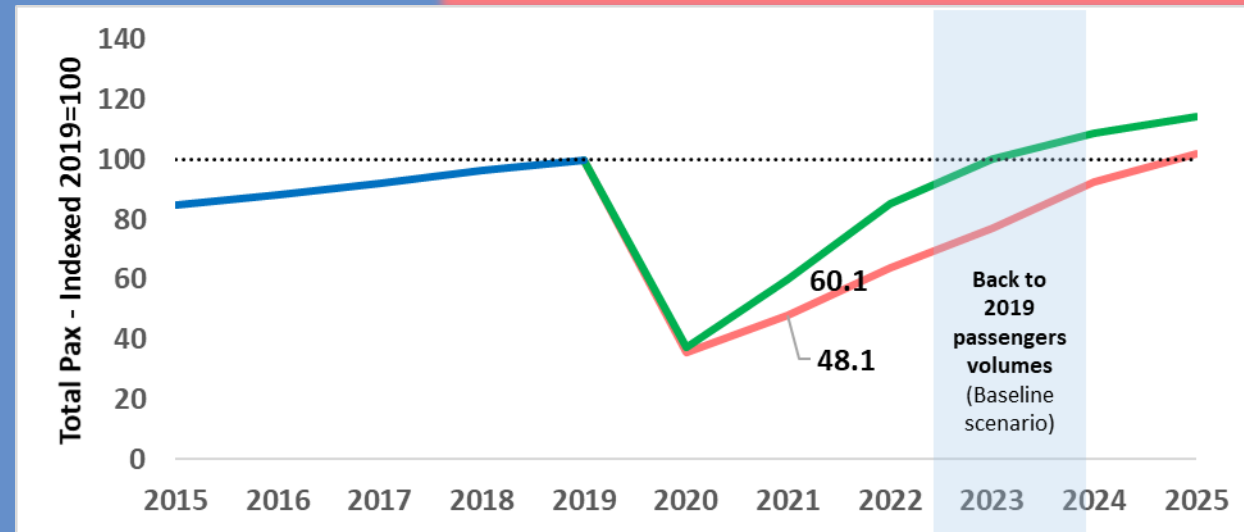
Canada => Sept 21

## Baseline scenario – 2023 return

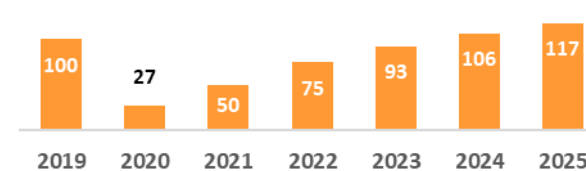
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- Strong rebound in pax confidence and airlines fleet recovery

## Low scenario – 2025 return

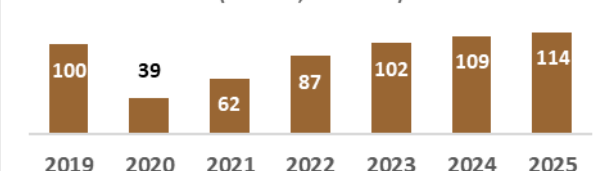
- Effective vaccine(s) in 2021 but complex supply chain requirements (cold chain)
- Limited vaccine supply with new variants
- Fear of traveling still present
- Prolonged economic downturn
- Slow airline fleet recovery



International Passenger Forecast (indexed, 2019=100)



Domestic Passenger Forecast (indexed, 2019=100)



# Overview of the situation in the Americas

## United States:

- U.S. has over **26mio** COVID-19 cases which count for about **25%** of all worldwide registered cases;
- **25mio** doses administered in the U.S. This represents approx. **7.5** shots for every 100 people;
- Effective **Jan 26 2021**, all air passengers entering the United States need to present a **negative** COVID-19 test;
- **Travel ban** for tourists from Europe, UK, Ireland, China, Brazil, Iran and most recently from South Africa has been extended;
- Some States (e.g. New England States, Hawaii, Alaska) introduced **travel restrictions** for **out-of-state visitors**;
- Biden admin. works on a **Federal response** and evidence-based **national guidance** to COVID-19.

## Central America:

- **Land borders** with **Mexico** still closed for non-essential travel, as is the land border with **Canada**;
- **No restrictions** in place for **air passengers** travelling from U.S. to Mexico;
- COVID-19 situation in Mexico is of **growing concern** as infection and mortality rates grow in some areas fast;
- **Panama** reopened to travelers on **Oct. 12, 2020**, along with one of the most **comprehensive** reopening guides;
- All other Central American are **open** but **with test requirements**.

## Caribbean:

- Most islands (incl. Puerto Rico) have introduced **strict health & safety protocols** including proof of negative COVID-test. Notable exception is **Dom. Republic** where no test is needed to enter the country.

## Cruise business:

- On **October 30, 2020**, CDC officially lifted the '**no sail order**' and issued a '**Framework for Conditional Sailing Order**' for cruise ships operating or seeking to operate in U.S. waters. This order introduces a phased approach for resuming passenger cruises.



# Overview of major initiatives to win support for the industry

- IAADFS main priority was to obtain **financial relief** for the Duty Free and Travel Retail industry due to the impacts from the pandemic;
- To do so, IAADFS has **coordinated its effort** with other airport concessionaire organizations;
- The COVID-19 relief package signed into law by Trump on Dec. 27 2020 contains **critical assistance for airport concessionaires** in the amount of **\$0.2BN**. The distribution of the funds will be determined by FAA;
- The COVID-19 relief package also includes new funding of the **Paycheck Protection Program (PPP)** which expired on Aug 8, 2020. The second round is funded with a total of **\$320BN**.
- There are more stimulus packages in the works so i.e. a new **\$1.9TR** bill to give much needed assistance to families and small businesses as well as communities;
- **On Dec 2 2020**, IAADFS organized its own **Webinar** for its members to give them an up-date on the state of affairs and deliver thoughts and opinion about future opportunities;
- COVID-19 is offering opportunities to approach authorities to **change** some of their **practices** and **introduce new ideas** that could open up new income sources:
  - Duty free on arrival
  - Increase duty free allowance
  - Changing the practice to confiscate liquor products at transit airports on US bound flights.

# Overview of current situation across CANADA

## Store Closures

**Canada /US Border has been closed to all but essential workers since March 21, 2020 and closure has been extended to at least February 21, 2021 (likely to extend well beyond)**

- Approximately 75% of land border stores are completely closed – those open to essential workers have very little traffic

## FDFA Work

- **Coalition of the Hardest Hit**

**Resulted in:**

### **Highly Affected Sectors Credit Availability Program (HASCAP)**

- **Broad access liquidity program targeting hardest hit -- Available February 1**



# Overview of major initiatives to win support for the industry

- **Rent Subsidy – Top Up Issue**
  - FDFA successfully advocated for the subsidy to be provided directly to tenants.
  - Duty Free stores can receive up 65 percent in base subsidy
  - We are currently engaged with the Minister of Finance, Minister of Small-Business and Minister for CRA to ensure stores can receive the top-up (25 percent) portion of the program

## Next Steps

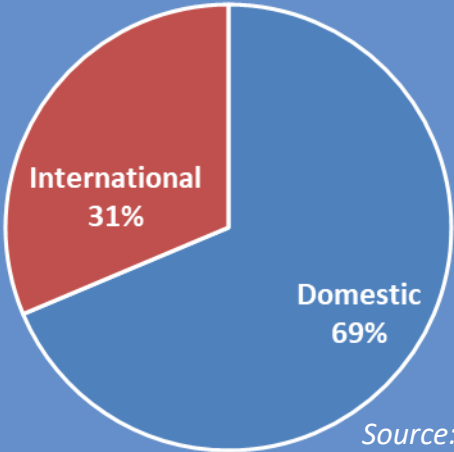
- Let's talk Budget 2021 – Pre-Budget consultations opened this week

## Key measures to the recovery of the Duty Free sector:

1. **Creation of a Canadian Duty Free Zone**
2. **Visitor Rebate Program**
3. **Safe Border Re-opening**

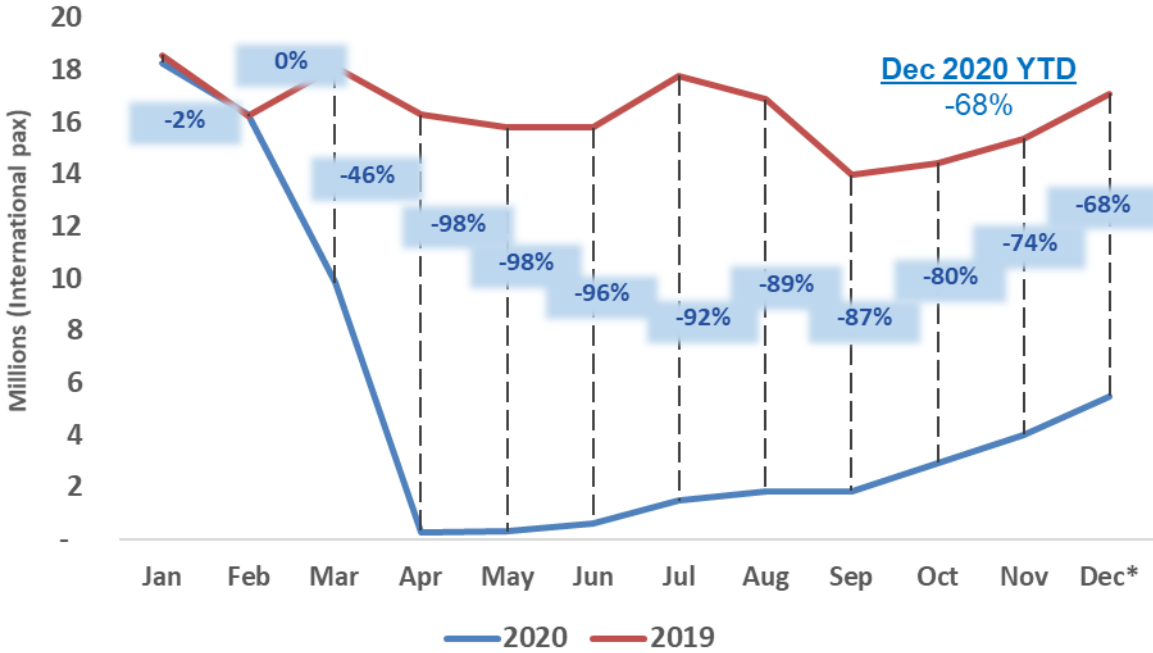


# Latin America-Caribbean – Historical pax



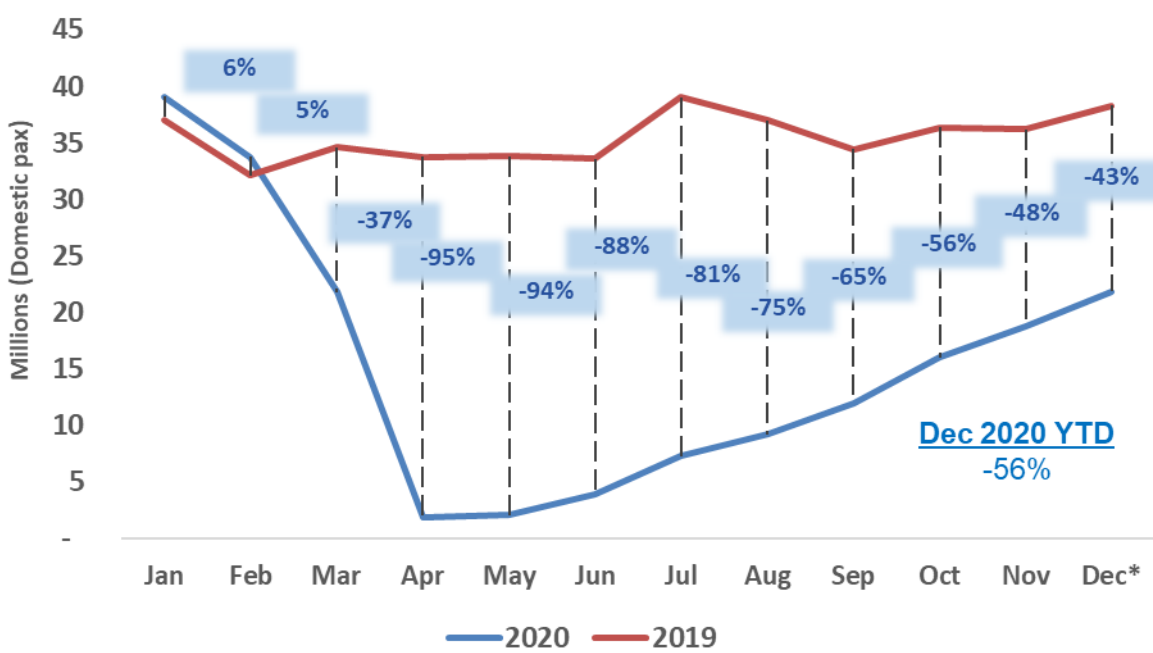
Source: ACI World, 2019

Intl.



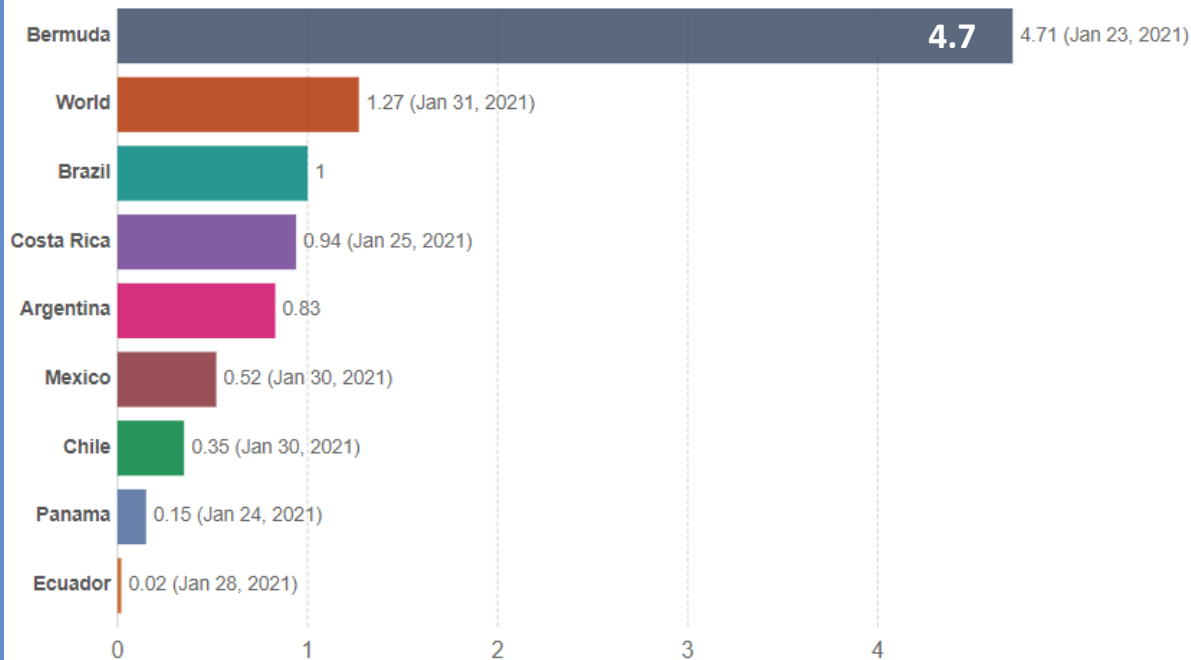
	CAGR % 2009-2019	YOY% 2020/2019
Intl	5.9%	-67.9%
Dom	6.5%	-56.0%
Total	6.0%	-59.9%

Dom.



# Latin America-Caribbean – Outlook 2021 and beyond

COVID-19 vaccine doses administered per 100 people, Jan 31, 2021



Source: Official data collated by Our World in Data – Last updated 1 February, 16:10 (London time) OurWorldInData.org/coronavirus • CC BY

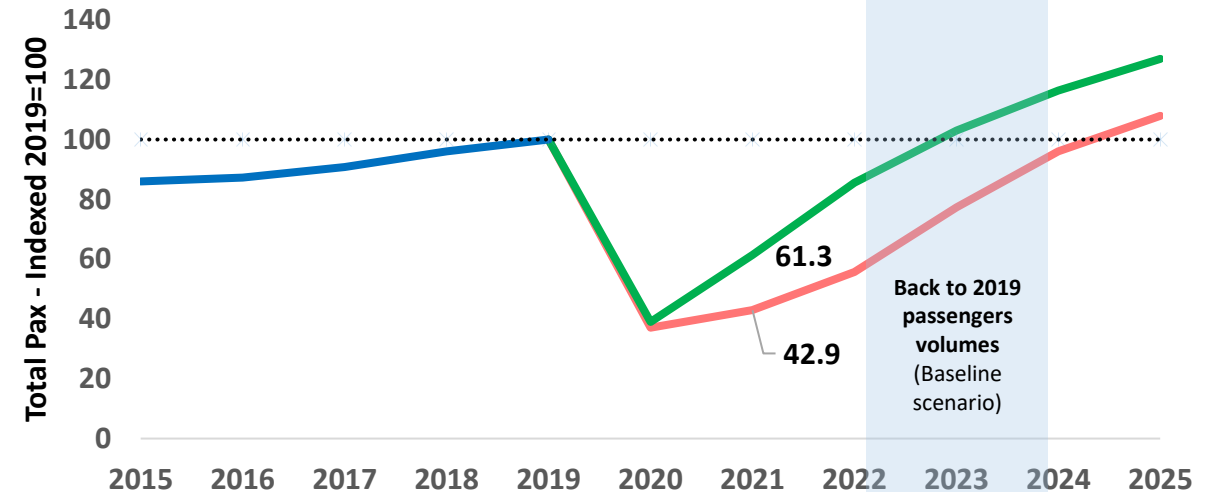
- Brazil by far the worst hit country over 9M cases and currently at 55K+ cases per day
- Slow pick up of vaccination campaigns. Herd immunity not likely before well into 2022
- Considerable fear around the vaccines and disinformation

## Baseline scenario – 2023 return

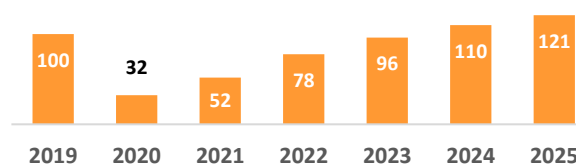
- Effective vaccine(s) mostly distributed throughout 2021
- Strong rebound in pax confidence and airlines fleet recovery

## Low scenario – 2025 return

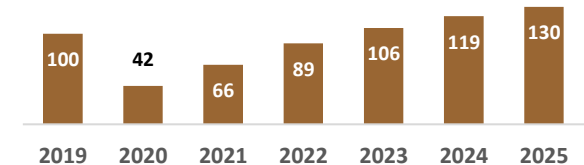
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Domestic Passenger Forecast (indexed, 2019=100)



# Overview of current situation across “ASUTIL”

- All airports open in LATAM, only some restrictions to flight frequencies
- All countries require a Negative PCR, some with quarantine
- Airlines are restarting international flights to most of the countries, a few are not restarting due to small numbers of passengers
- Border stores are open and slowly recovering including twin cities
- Some countries started vaccination process and will have sanitary passport

# Overview of major initiatives to win support for the industry



- Joint Statement issued with ACI LAC, 4/20
- Joint Statement issued with the Brazilian National Association of Airport Concessionaires
- Letter to all ICAO representatives in each country with recommendations for global standards and recovery protocol
- Letter to the Uruguayan government to facilitate the pre-sale of airport DF before travelling and the possibility of selling products to local people paying a tax at borders (in process)
- Letter to the Brazilian Government to reduce costs of IT information for border shops (SEPRO) success started 2/21
- Letter to the Brazilian Government for updating the DF allowance for Brazilians in border shop to harmonize with border allowance coming from other countries, expected 3/21
- DF Operators joined a workforce with Customs in order to modernize DF legislation including evaluating Home Delivery from the store (in process in 3 countries)
- 10/20 Joint letter ACI LAC, ALTA, IATA for acceptance of negative PCR and no quarantine
- Uruguayan government decree 1/21 creating a commission for “no presencial” sale to tourists in borders

# 2021 – Year of Recovery? Duty Free World Council

February 3<sup>rd</sup>. 2021

Thank you for your support and attendance