

Press Statement – For immediate release

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European Travel Retail reaches historic record in 2025: ETRC Index reports €10.13 billion in sales, representing a 5.5% year-on-year increase

The European Travel Retail Confederation (ETRC) has released the ETRC Business Performance Index for the full year 2025, revealing that the European airport duty free and travel retail sector recorded total annual value sales of €10.13 billion, representing a +5.5% increase compared to 2024 and marking the highest value sales in the sector's history.

Building on this performance, the 2025 Index confirms continued strengthening of the European Airport Duty Free market, with growth supported by both value and volume trends. Total sales reached €10.13 billion, up 5.5% on 2024, while unit sales increased by 4.5% year-on-year, underlining sustained demand across the sector within a competitive travel environment.

At the same time, the Index highlights a divergence between retail performance and passenger traffic. Passenger numbers increased by 5.8% compared to 2024, outpacing sales growth. As a result, average spend per passenger softened slightly over the year, reaching €10.55, representing a marginal decline of -0.3% year-on-year.

Across categories, performance remained broadly positive, with all macro categories delivering year-on-year growth. Tobacco and Food categories recorded particularly strong results, each achieving double-digit increases, while the Spirits sub-category experienced a modest decline in both volume and value, with value sales decreasing by -0.7%.

Nigel Keal, President of ETRC, commented: "The 2025 results underline the sector's resilience, with record sales achieved despite a more complex environment. While spend per passenger has slightly softened, the industry remains well positioned to strengthen its performance and deliver sustainable growth in the years ahead. Fingers crossed, the Middle East situation is resolved as soon as possible."

Developed for ETRC, the ETRC Index is compiled by Pi Insight based on data provided by participating travel retailers, with passenger data supplied by ForwardKeys. The full report is available exclusively to ETRC members.

ENDS

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About the European Travel Retail Confederation

The European Travel Retail Confederation (ETRC) is an industry association for the duty free and travel retail industry in Europe, serving the industry and its members to help create the right environment to allow the industry to achieve its potential and protect it when challenges arise.

ETRC is composed of national and regional affiliated trade associations representing over 200 European companies, Tax Free World Association (TFWA) representing 500 brand companies, and direct corporate membership from individual companies working in the duty free and travel retail trade across Europe and beyond. The European Travel Retail Confederation's operations are directed by its Supervisory and Managing Boards and carried out by a full-time secretariat. For more information about the organisation, please see our website – www.etrc.org