

# **AER RIANTA INTERNATIONAL U.S. MARKET ENTRY:**

## **KEY FINDINGS AND RECOMMENDATIONS**

Presentation given to Aer Rianta International



# AGENDA

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**EXECUTIVE SUMMARY**

**KEY FINDINGS/SUMMARY OF  
RECOMMENDATIONS**

**METHODOLOGIES**

☐JFK

☐FLL

☐ORD

☐EWR

☐LAX

☐TPA

☐SLC

☐MCO

**ALTERNATIVE**

**OPTION:**

**ACQUISITION NEXT STEPS**

# EXECUTIVE SUMMARY

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IDENTIFIED AND ANALYZED U.S. AIRPORTS AND TERMINALS FOR AER RIAN TA INTERNATIONAL (ARI) TO FOCUS THEIR EFFORTS ON IN ORDER TO ENTER THE U.S. DUTY FREE MARKET.

## THE OVERALL PROCESS:

- Quantitatively assess airports utilizing key financial performance metrics to rank airports/terminals attractiveness for entry
- Scope out airport governance structures and stakeholders integral to the contract award process
- Evaluate contract pipelines, targeting airports with upcoming bidding schedules
- Identify potential partnerships to undertake, with particular focus on ACDBE partners

## AREAS OF FOCUS:

- Airports with sufficient international passenger enplanement numbers (>1 million enplanement s/airpor t)
- Preference for Market Entry through **Joint Venture Partnership** rather than Acquisition

# SUMMARY OF RECOMMENDATIONS

## IDENTIFIED 8 AIRPORTS



Fort Lauderdale-Hollywood International Airport

Newark Liberty Airport

Los Angeles International airport

Tampa International Airport

Chicago O'hare International Airport

Salt Lake City International Airport

John F.Kennedy International Airport

Orlando International Airport

## POTENTIAL ACQUISITION OPPORTUNITY

### INTERNATIONAL SHOPPES

- ☐ Family Owned Operation
- ☐ 6 Northeast locations
- ☐ Strategic timing - COVID impacted their business

# METHODOLOGIES

## COLLECT INITIAL ENPLANEMENT DATA

- ☐ Airport Experience Factbook (AXN): Terminals with > 1 Million international departures per year.

## SPREADSHEET OF 26 AIRPORTS

- ☐ Existing Duty Free players
- ☐ Potential ACDBE'S
- ☐ Stakeholders/ Airport governance
- ☐ Existing Terminals
- ☐ Contract Dates (Start date and expected end date)

## APPLY EVALUATION CRITERIA

1. Upcoming Lease Expiries
2. Placement on the Growth Matrix (Top Right) 1.
3. Capacity for Terminal/Airport Expansion 2.
4. Attractive ACDBE partnerships 3.

## SELECTION OF TOP 8 AIRPORTS

Airports split into **Primary** (> 5 mil int'l eps) and **Secondary** (< 5 mil int'l eps)

### Primary:

John F.Kennedy International Airport  
Fort Lauderdale-Hollywood International Airport  
Chicago O'hare International Airport  
Newark Liberty Airport  
Los Angeles International airport

### Secondary:

Tampa International Airport  
Salt Lake City International Airport  
Orlando International Airport

# LEVERAGED ONLINE DATA/REPORTS TO UNDERSTAND LANDSCAPE

INFORMATION TYPE	SOURCES/ACTIONS TAKEN
QUALITATIVE ANALYSIS OF AIRPORT NEWS/INFORMATION	Gathered information from Airport/Terminal Websites, Airports Council International site, Moodie Davitt Report. Utilized information to understand stakeholders/governance/contract pipelines, important news
QUANTITATIVE ANALYSIS	Leveraged AXN Factbook Databases to collect historical financial and international travel data for each airport and terminal of relevance. Constructed Spreadsheets and Charts to calculate key metrics
ACDBE SEARCH	Consolidated US DOT Unified Certificate Program Databases for licensed ACDBE's to identify potential partnerships for JV bidding for ARI

# AIRPORT CONCESSIONS DISADVANTAGED BUSINESS ENTERPRISE

## SELECTION PROCESS

### INDUSTRY CLASSIFICATION

Narrowed down ACDBE's by relevant Industries:

- Operations
- Retail
- Concessions
- Management



### COMPANY SEARCH

Utilized the **Unified Certification Program** database for all eligible states.

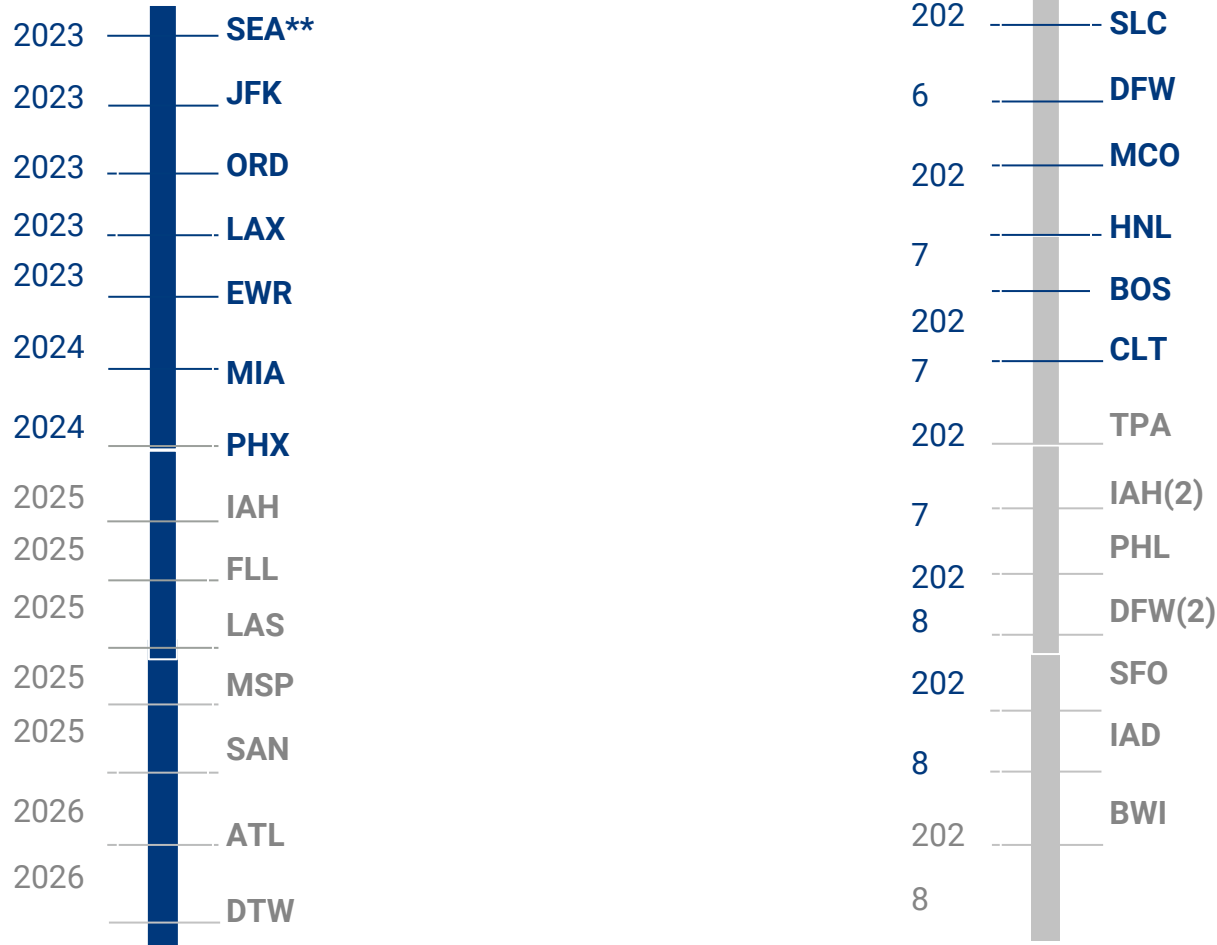
**Unified Certification Program:** List issued per state by the department of transportation of all ACDBE'S certified within the state

### MAKING THE CUT

Proceeded with ACDBE'S that met the selection criteria

- 1)Website
- 2)Contact
- 3)Description

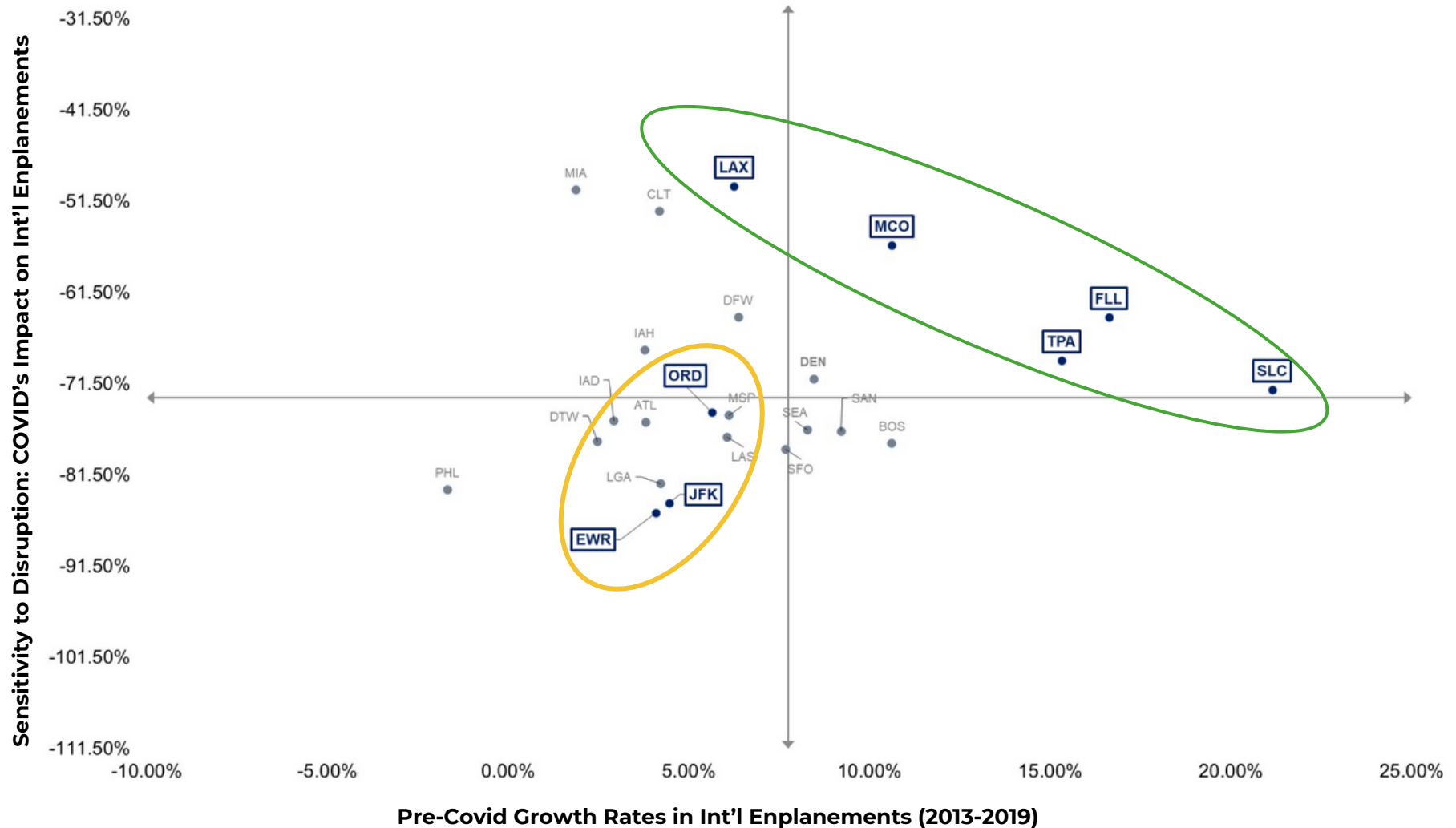
# DUTY FREE LEASE EXPIRATION TIMELINE



\*\*Currently soliciting bids for duty free retail until april 2023



# GROWTH VS. SENSITIVITY: GRAPH OF 26 AIRPORTS





# AIRPORT ANALYSIS

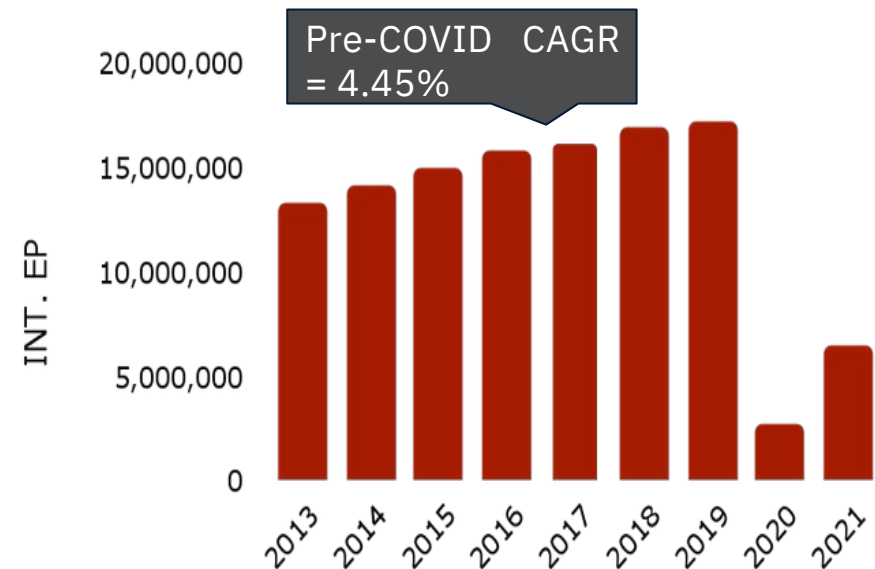
JFK International Airport, NY



## TERMINALS OF INTEREST

New Terminal One	T-1, T-4 T-7, T-8	New Terminal Eight
Existing Contracts		
DFS, DFA, International Shoppes		
LEASE EXPIRY		
2023-2026*		
DF SALES / INT.EP		
2019- \$14.25		
2021- \$12.72		

## INTERNATIONAL ENPLANEMENTS



## EXPLANATION FOR INTEREST

JFK New York is a major hub for international business, finance, and tourism, which contributes to the high volume of air traffic through the airport. It serves as a major gateway for international travel, with more than 90 airlines operating out of the airport. The New Terminal One (NTO) at John F. Kennedy International Airport will be a 23-gate, state-of-the-art, international-only terminal, that aims to create opportunities for local businesses.

\*The New Terminal One (NTO)

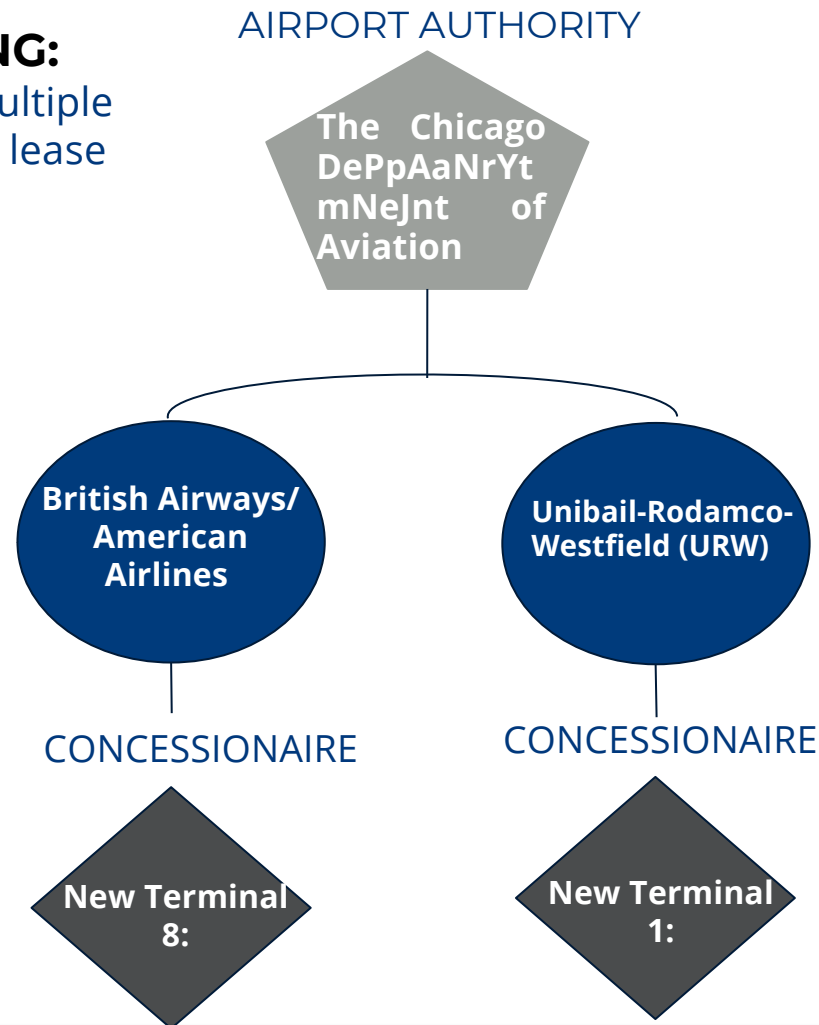
# DECISION MAKERS/INFLUENCERS

JFK International Airport, NY



## PRIME CONTRACTING:

PANYNJ contracts with multiple prime concessionaires to lease out/manage multiple concessions spaces.



# ACDBE'S OF INTEREST

JFK International Airport, NY



## **BYRD RETAIL GROUP**

BRG offers a diverse portfolio of fashion, beauty, and lifestyle brands, presented in customized shop concepts designed specifically for airports. Their focus is on connecting with the 700 million people who pass through America's top 100 airports each year. BRG prioritizes their commitment to bringing a convenient and enjoyable shopping experience to the airport setting.

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## **IMAGINE AIRPORT VENTURES, LLC**

Imagine Airport Ventures, LLC provides specialized consulting services to businesses that operate in the airport retail industry. They help clients with various aspects of their operations, like retail strategy development, product selection and pricing. They help clients navigate the complex regulatory environment of airports and ensure compliance with local laws and regulations.

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## **SHEKINAH GROUP, LLC**

Shekinah Group, LLC provides temporary staffing, construction, project management, and airport operations and management consulting. Shekinah is certified as a DBE, ACDBE, and MWBE in multiple states and offers general management, strategic marketing and planning, front-of-the-house sales operations, human capital deployment, retention and training, as well as loss prevention strategies.



FORT LAUDERDALE-HOLLYWOOD  
INTERNATIONAL AIRPORT

BROWARD COUNTY, FLORIDA

# AIRPORT ANALYSIS

Fort Lauderdale-Hollywood International, FL



## TERMINALS OF INTEREST

T-1 T-3 T-4  
EXISTING CONTRACT

3Sixty (DFASS Group)

LEASE EXPIRY

Dec. 2024 Airport-wide

DF SALES / INT. EP

2019-  
\$2.55

2021-  
\$2.69

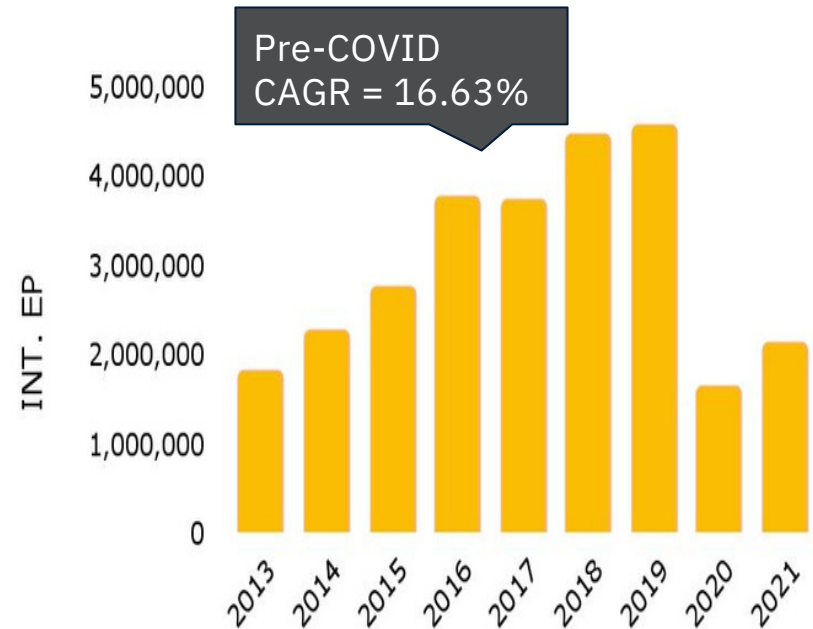
FLL is an intriguing prospect for ARI entry into the US as it has an **upcoming lease expiry**, **attractive growth prospects**, and only **one existing contractee** for duty free. With

**terminal expansion** in the pipeline, growth

going to continue to exist. **ExpXh prospects** for international travel at FLL are an **upcoming lease expiry**, **attractive growth prospects**, and only **one existing contractee** for duty free. With **terminal expansion** in the pipeline, growth

with continued expansion and potentially new DF storefronts, competitive bidding will come up.

## INTERNATIONAL ENPLANEMENTS



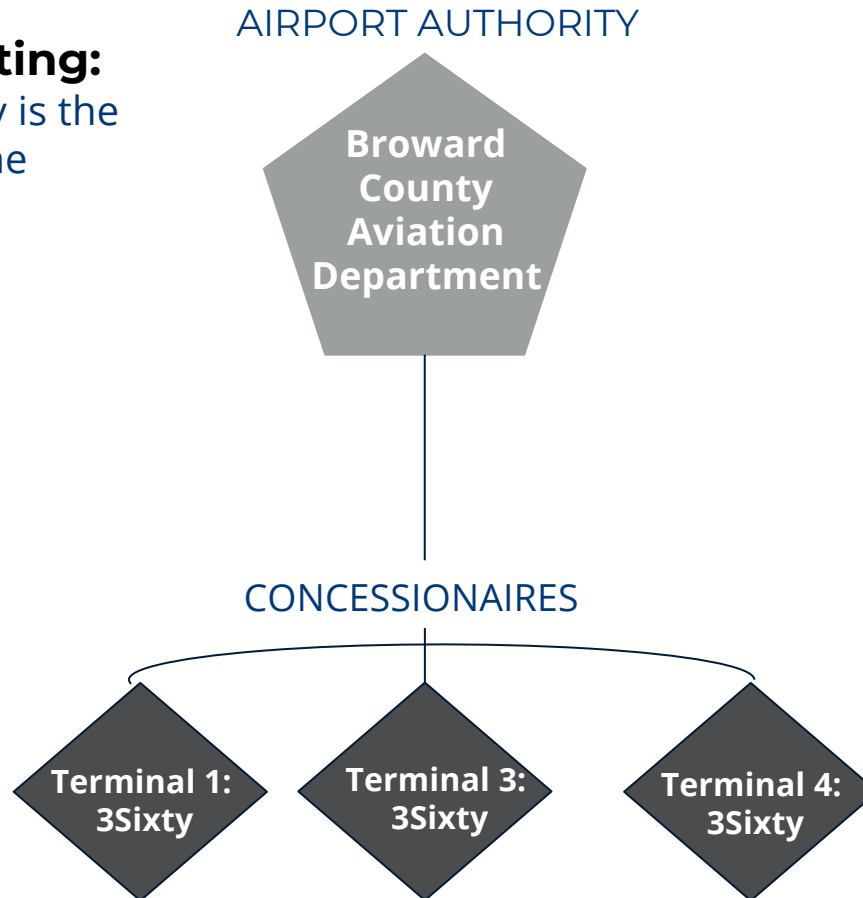
# DECISION MAKERS/INFLUENCERS

Fort Lauderdale-Hollywood International, FL



## **DIRECT Contracting:**

The airport authority is the main influencer in the selection of a concessionaire





# ACDBE'S OF INTEREST

Fort Lauderdale-Hollywood International, FL



## **WILLIAMS AND HOPE CORPORATION (WHC)**

WHC offers consulting services to assist small disadvantaged companies in establishing relationships with government agencies and major business networks. WHC can be a potential key partner in FLL as they have work experience with other big clients in this airport and can serve as a link between ARI and the smaller DBE community.

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## **UNITED CONCESSIONS GROUP (UCG)**

UCG is a women owned company engaged in many facets of airport store operations, including food, newsstand, and other concessions services. They already operate services in a multitude of airports and have extensive experience partnering with larger businesses. They do not currently have operations in Florida, but are registered to operate there.

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## **SUNSHINE ENTERPRISE USA, LLC**

Operating out of Florida, Sunshine Enterprise offers staffing solutions underpinned by the mission of connecting great people with great companies. They mainly engage with recruiting solutions to meet the needs of their clients, whether it be temporary staffing or full-time contracting.



# AIRPORT ANALYSIS

## Chicago O'Hare International Airport (ORD)



### TERMINALS OF INTEREST

T1 B-C, T2, T3, T5

### EXISTING CONTRACTS

3Sixty (Nuance Group) DUFY

\*Terminal 5 expansion recently completed

### LEASE EXPIRY

3Sixty - 2023

DUFY - 2034

### DF SALES / INT.EP

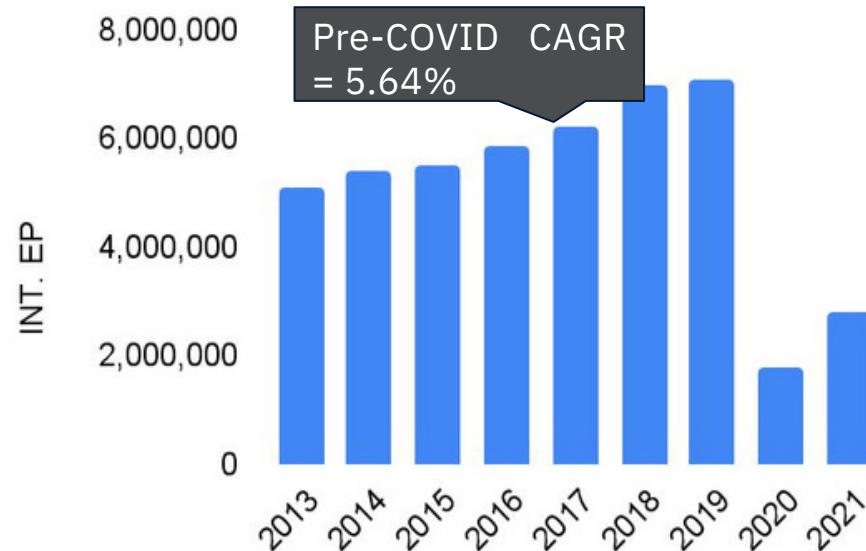
2019-

\$5.12

2021-

\$5.20

### INTERNATIONAL ENPLANEMENTS



### EXPLANATION FOR INTEREST

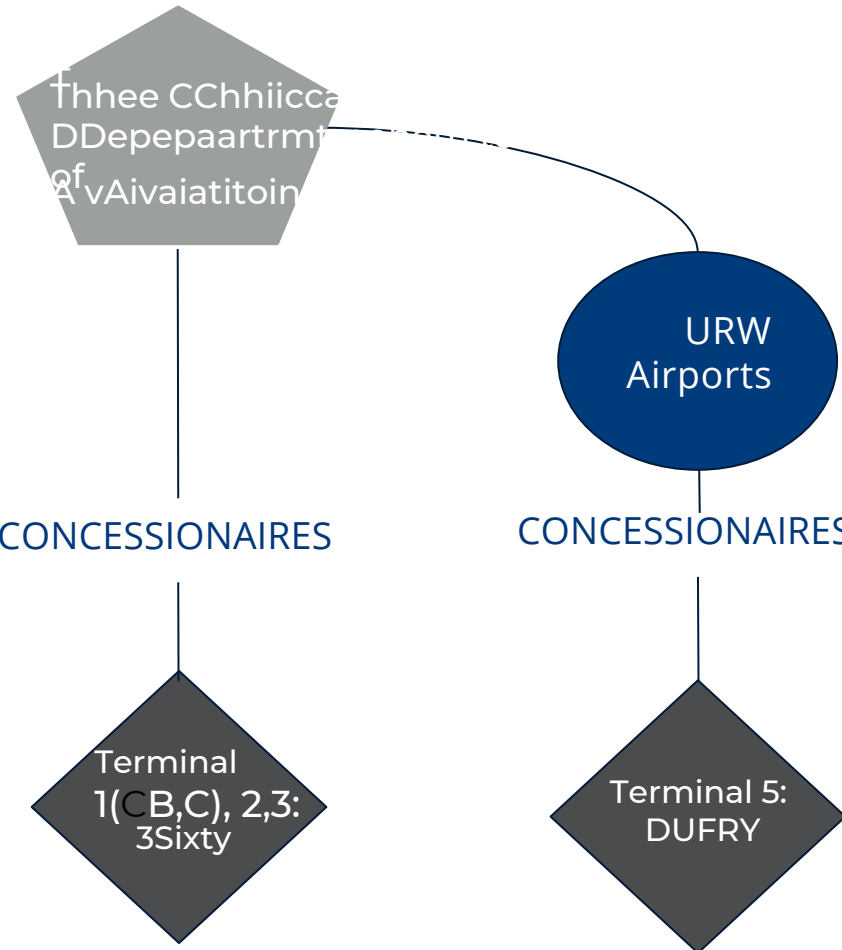
ORD is a top 5 U.S. Airport for international traffic and has a series of **contracts that will be coming up the pipeline** soon as 3Sixty may exit their contract soon. This airport offers ARI exposure to the **major business hub** and midwestern U.S. location of Chicago, with a sizeable amount of international travel to airports ARI already has footholds in.

# DECISION MAKERS/INFLUENCERS

Chicago O'Hare International Airport (ORD)



## AIRPORT AUTHORITY



## MIXED Contracting:

The airport authority uses a mixed approach to contracting with some direct authority and some delegation to a master concessionaire

# ACDBE'S OF INTEREST

## Chicago O'Hare International Airport (ORD)



### **Vargas Group, Inc.**

provides services for ground transportation, contract teaming, contract management, facilities management, and janitorial. Moreover, they offer project management, cleaning, energy, sustainability, and engineering services.

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### **Corliss Stone-Littles, LLC**

CSL, LLC provides management services and commercially useful functions in the operation of locations run as part of joint venture operations. CSL, LLC's knowledge and understanding of the national standards established by DOT assists its JV partners in assuring that each store operates in accordance with the ACDBE requirements articulated by various airport operators.

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### **Blue Daring Consulting, Inc**

Blue Daring is a Chicago-based, award-winning group of branding and strategy professionals that develops strategies, brands, and initiatives that pique interest, increase exposure, and advance strategic objectives. They offer a slew of services like branding, content marketing, web design, and digital strategy development.



# ***Newark Liberty***

## ***International Airport***

# AIRPORT ANALYSIS

Newark Liberty International, NJ



## TERMINALS OF INTEREST

T-A, T-B, T-C

Existing Contracts

Dufry, DFASS

LEASE EXPIRY

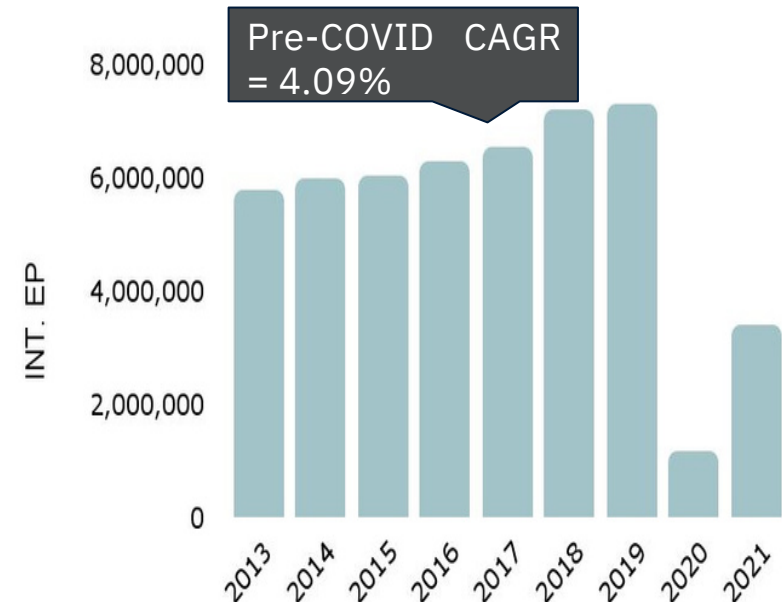
Undetermined

DF SALES / INT.EP

2019- \$5.64

2021- \$5.31

## INTERNATIONAL ENPLANEMENTS



## EXPLANATION FOR INTEREST

EWR offers a good prospect into the competitive NY space of int'l airports. New Terminal A recently opened which has a capacity of 14 Million passengers annually and will accommodate **new international gates in late 2023**. While the lease expiry is undetermined, we deem EWR a good project due to its **strategic placement near NY** as a business hub, **attractive potential DBE** partnerships, and a **multitude of potential stakeholders** to engage with.

# Newark Liberty International NJ



PANYNJ contracts with multiple prime concessionaires to lease out/manage multiple concessions spaces.

```
graph TD;
    A[The Chicago Department of Aviation] --- B[Munich Airport];
    A --- C[Fraport USA];
    A --- D[OTG Management];
    B --- E[CONCESSIONAIRE];
    C --- F[CONCESSIONAIRE];
    D --- G[CONCESSIONAIRE];
    E --- H[Terminal A: Dufry];
    F --- I[Terminal B: 3Sixty];
    G --- J[Terminal C: Dufry];
```

The Chicago Department of Aviation is the parent organization, which is connected to three concessionaires: Munich Airport, Fraport USA, and OTG Management. Each concessionaire is further connected to a specific terminal: Terminal A (Dufry) under Munich Airport, Terminal B (3Sixty) under Fraport USA, and Terminal C (Dufry) under OTG Management.



# ACDBE'S OF INTEREST

Newark Liberty International, NJ



## **EJE TRAVEL RETAIL**

EJE Travel Retail is a duty and tax-free specialty shop that offers luxury brand products at discounted prices. They promise a unique customer experience with savings on top brands such as Givenchy, Tommy Hilfiger, Chanel, Cartier, Montblanc, and Chivas. EJE Travel Retail is considered the best destination for travel retail.

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## **LEJUNE AND ASSOCIATES**

Lejeune and Associates, LLC is a certified ACDBE with more than 50 years of management experience in various retail environments. They specialize in property management, including revenue generation, leasing, marketing, and construction projects. Their expertise spans across airports, urban retail centers, hotels, offices, and mixed-use projects.

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## **RL CONSULTING, LLC**

RL Consulting LLC offers experience-informed consultations to help businesses at any stage of their life cycle. Their services range from helping with registrations and licensing to creating comprehensive proposals that maximize resources. RL Consulting LLC mission is to strive to help every entrepreneur maximize their return on investment.

LAX

# AIRPORT ANALYSIS

## LOS ANGELES INTERNATIONAL AIRPORT, LAX



### TERMINALS OF INTEREST

T-2, T-3, TBIT T-4 T-7



New Terminal Three

#### EXISTING CONTRACT

DFS Group

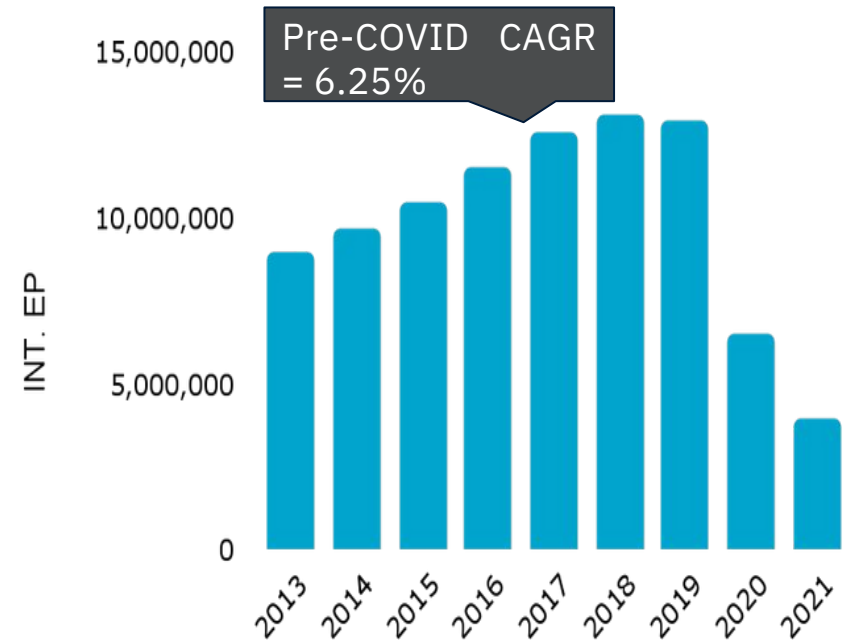
LEASE EXPIRY

Sept. 2023

DF SALES / INT.EP  
2019- \$18.56

2021- \$12.93

### INTERNATIONAL ENPLANEMENTS



### EXPLANATION FOR INTEREST

LAX gives ARI exposure to the **second largest international travel market** in the U.S. complimented by attractive growth and a full-scale **developmental revamping of terminals**. ARI has **competed here in the past** and DFS have established themselves as the sole player in the DF market here, however **more competitive bidding** will come as the **new int'l terminal master concessionaire** and project stakeholders seek to fill new DF shops.

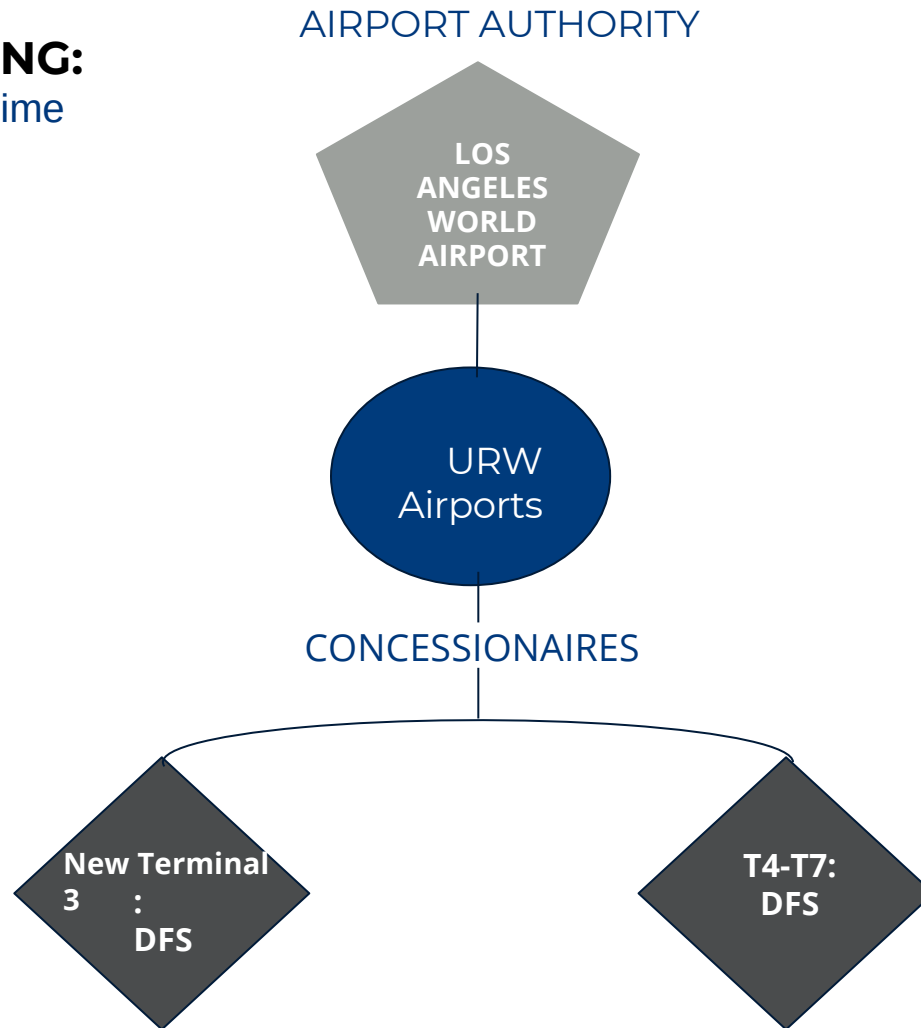
# DECISION MAKERS/INFLUENCERS

LOS ANGELES INTERNATIONAL AIRPORT, LAX



## PRIME CONTRACTING:

LAWA contracts with a prime concessionaire to lease out/manage multiple concessions spaces.



# ACDBE'S OF INTEREST

## LOS ANGELES INTERNATIONAL AIRPORT, LAX



### **Brakkam Aviation Management LLC**

BRAKKAM's services span all areas of air transportation but in particular, organizational, business and infrastructure development at airports. The company also helps bigger clients expand into new markets by connecting with key stakeholders, including international clients like ARI seeking to expand into the US market through private/public partnerships.

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### **BRANDED WORKS, INC.**

Is a majority Women- Owned / WBE / ACDBE Certified Company holding certifications in numerous States around the United States. The company was established. With a fresh vision, Branded Works Inc delivers the highest quality brands to the Nation's airports.

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### **Performance Excellence Partners, LLC (PEP)**

PEP is a certified women-owned small business that has been in operation for over 25 years, helping clients with workforce development, human capital services, and training & professional development. PEP has extensive experience in managing the intersection between public and private entities and therefore offers expertise under this umbrella, applicable for entrance and compliance in federal airport concessions management.



**Tampa  
International  
Airport**

# AIRPORT ANALYSIS

## TAMPA INTERNATIONAL AIRPORT, FL



### TERMINALS OF INTEREST

T-E T-F

EXISTING CONTRACT

World Duty Free Of Tampa,  
WDFG North America LLC

LEASE EXPIRY

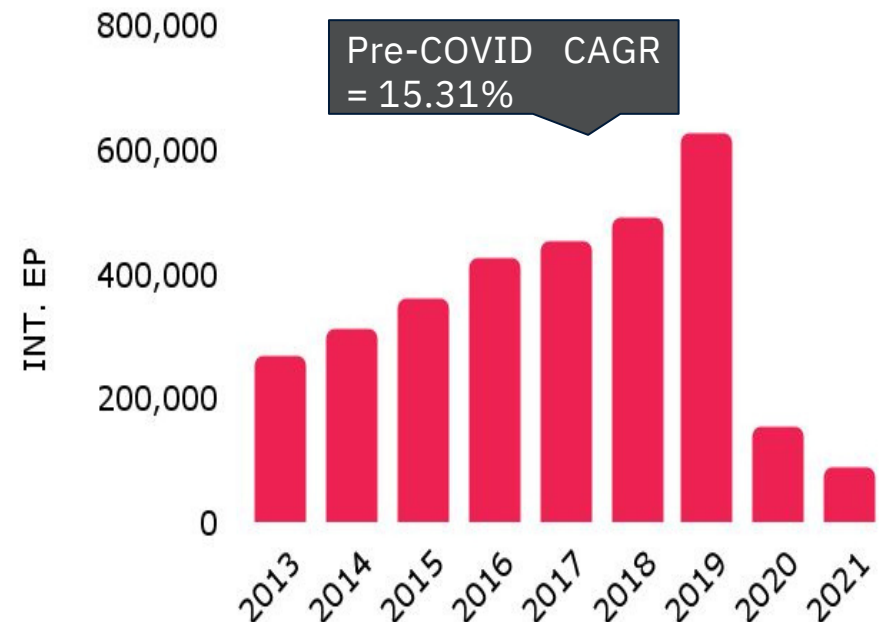
Apr. 2028

DF SALES / INT.EP

2019- \$4.10

2021- \$6.18

### INTERNATIONAL ENPLANEMENTS



### EXPLANATION FOR INTEREST

TPA is one of the **secondary entry prospects** for ARI, but attractive nonetheless. On the growth matrix, it is established in the **top right**, and does **not have as competitive** of an environment as a bigger airport. The **upcoming lease expiry** is in a good point of time for ARI to begin stakeholder engagement and strategy for market entry. Additionally, with only **one controlling airport authority**, the landscape can be easier to navigate than other airports

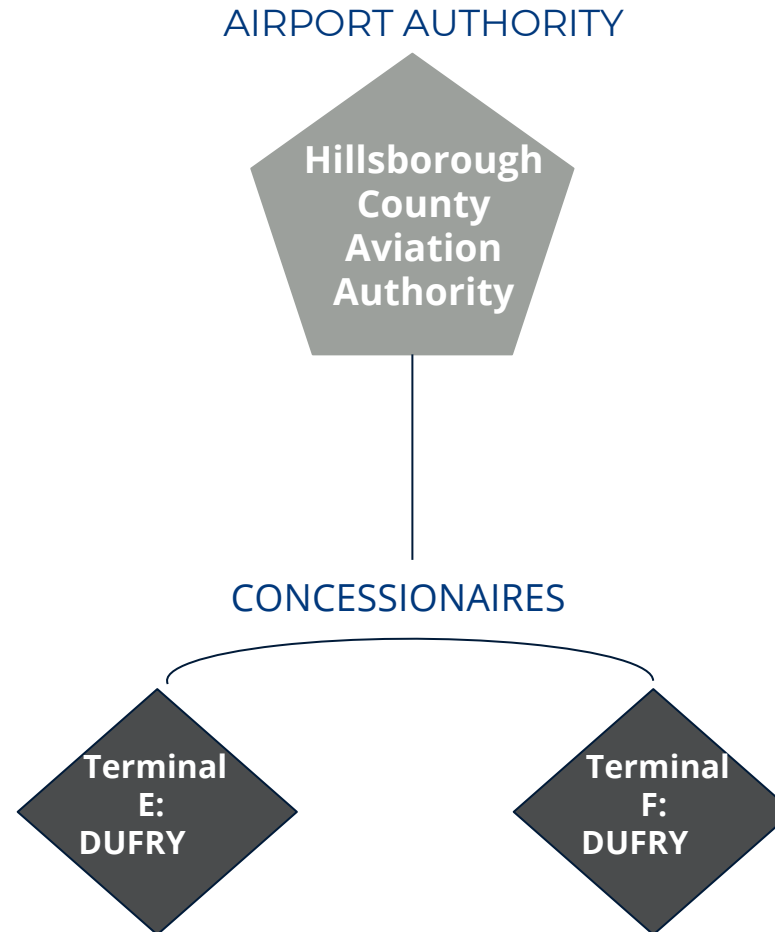
# DECISION MAKERS/INFLUENCERS

TAMPA INTERNATIONAL AIRPORT, FL



## **DIRECT Contracting:**

The Hillsborough County Aviation Authority is the main influencer in the selection of a concessionaire





# ACDBE'S OF INTEREST

## TAMPA INTERNATIONAL AIRPORT, TPA



### **Diamarx Management, LLC**

Diamarx Management provides services in airport sales and marketing. They offer high-quality services in retail, food and beverage, and consultation, with a focus on creative ideas to generate increased sales and innovative merchandising concepts.

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### **Complete Contract Consulting**

30 years of experience helping clients win government/commercial contracts through bid proposal writing services, certification assistance, and compliance-related document management. Additionally, the company assists businesses with the end-to-end procurement selection cycle.

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### **E&K Retail Inc.**

E&K Retail Inc. is an airport retail concession partner providing food, travel necessities, retail services, and more to airports. They have been in the business of joint venture partnerships in airports for almost 25 years and have operations in EWR, MSP, and DFW among others, while also certified to operate in Florida.



Salt Lake City International Airport

# AIRPORT ANALYSIS

Salt Lake City Airport, UT



## TERMINALS OF INTEREST

T1 and T2

EXISTING CONTRACTS

DUFY (through Hudson Group)

LEASE EXPIRY

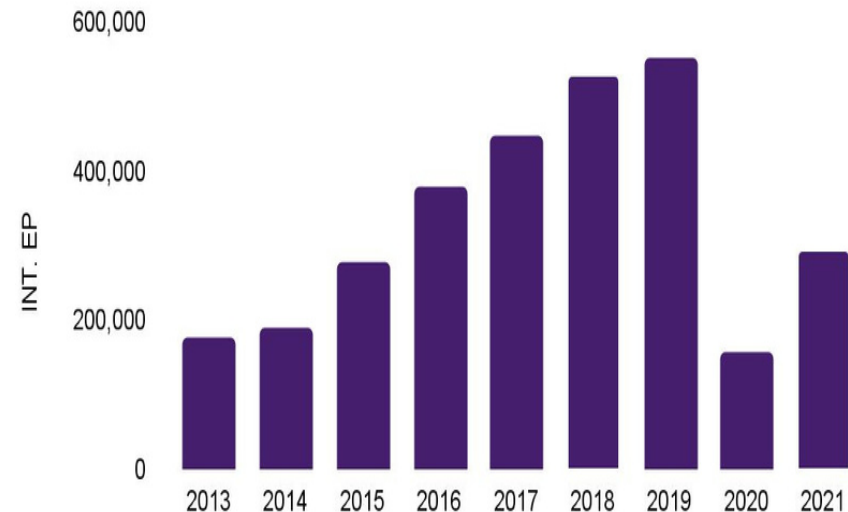
Dec. 2026

DF SALES / INT. EP

2019- \$1.75

2021- \$2.30

## INTERNATIONAL ENPLANEMENTS



## EXPLANATION FOR INTEREST

SLC is the **fastest growing secondary market** airport we looked at for ARI. In 2019, SLC completed a **\$4.1 billion airport redevelopment project**, which included the construction of two new concourses and a centralized terminal building. Salt Lake City is the main upcoming **US bidder for the Winter Olympics** and is a likely candidate for 2030 or 2034. ARI is recommended to keep tabs on this process as it offers a good prospect for **potential major uptick in international travel** to the airport.

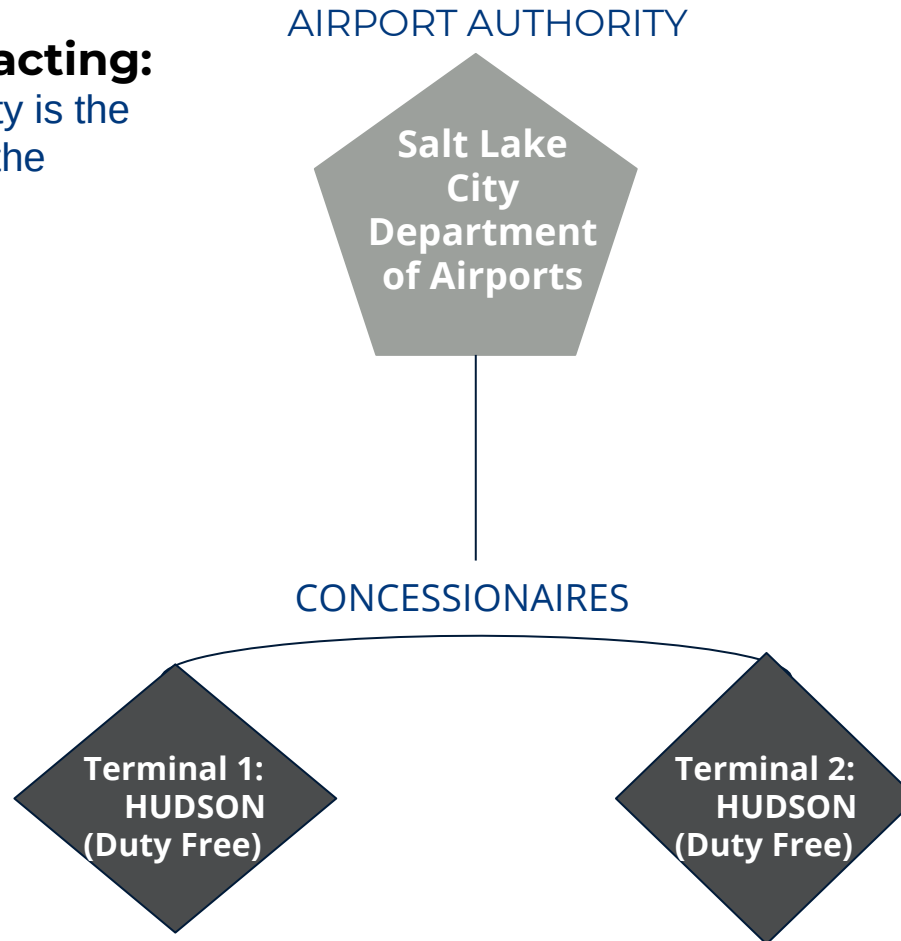
# DECISION MAKERS/INFLUENCERS

Salt Lake City Airport, UT



## **DIRECT Contracting:**

The airport authority is the main influencer in the selection of a concessionaire



# ACDBE'S OF INTEREST

Salt Lake City Airport, UT



## **AIRPORT RETAIL GROUP, LLC**

(formerly St. Croix Airport Retail, Inc.) is an award-winning ACDBE operator of specialty retail, gifts, food, beverage, news, and convenience. Based in Minneapolis, Minnesota, the company has operations at MSP, DEN, IAH, LGA, EWR, RDU, FLL, and MDW. Their expertise is found in selecting brand partnerships for airport partners, balancing a portfolio of both global and local brands. With 25 years of experience and a more established name, they can be a key partner for ARI in discovering brands.

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## **Emerging Domestic Market Ventures, LLC**

Gonzalo de la Melena is the dynamic CEO who heads this operation, an airport concessions company with experience servicing PHX, DEN, and most importantly SLC. He specializes in global brand management, supplier diversity, site selection, and market intelligence. Emerging Ventures can offer local insights into entering SLC and help garner local supplier contracts.

## **REGALI INC.**

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Regali provides general administrative and leadership services to a robust range of airport concessions joint ventures. The company has mainly worked in the Dallas Fort Worth International Airport but is additionally certified to operate in Utah. The business participates actively in the Airport Restaurant & Shop Association (ARRA) and the CEO is an active participant on numerous civic engagement boards supporting airport duties.



# ORLANDO INTERNATIONAL AIRPORT

# AIRPORT ANALYSIS

Orlando International Airport (MCO)



ORLANDO  
INTERNATIONAL  
AIRPORT

## TERMINALS OF INTEREST

T-A, T-B, T-C

EXISTING CONTRACTS

3Sixty

LEASE EXPIRY

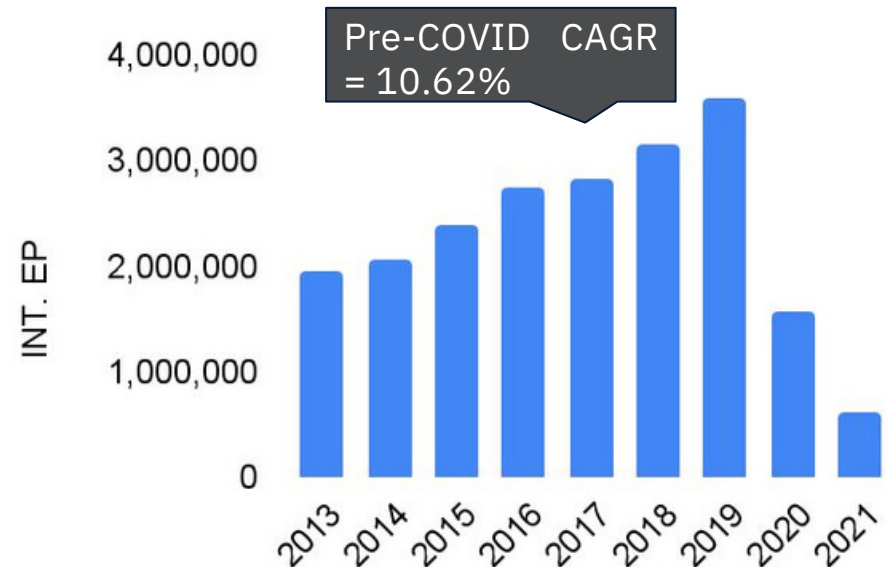
Feb. 2027

DF SALES / INT.EP

2019- \$5.73

2021- \$4.74

## INTERNATIONAL ENPLANEMENTS



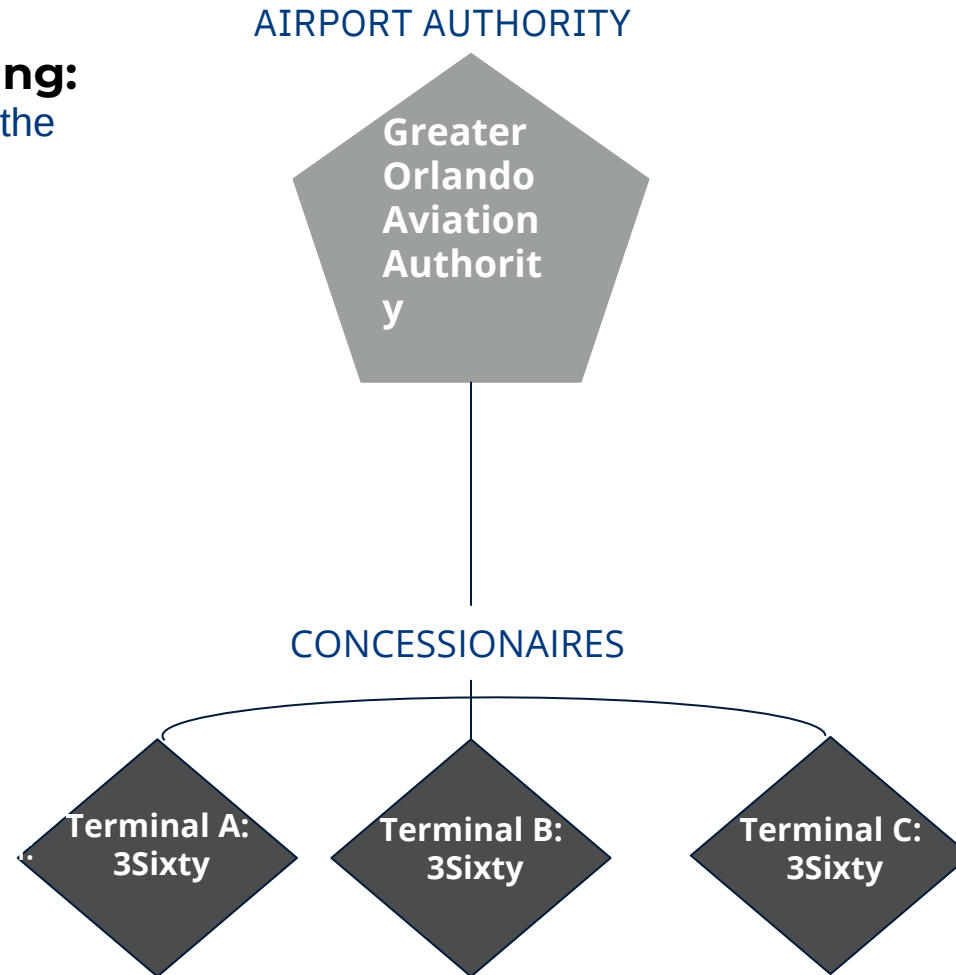
## EXPLANATION FOR INTEREST

Orlando serves as another secondary market for ARI to concentrate on, although it is **rapidly growing into a primary market**. MCO has the second largest expansion project of our airports reviewed, with a **\$3B new terminal project** that was just completed this fall including international gates. **New DF contracts may come up** as retail is planned out for this airport, so we recommend ARI engage with stakeholders to find openings in this new development.



## **DIRECT Contracting:**

The airport authority is the main influencer in the selection of a concessionaire





# ACDBE'S OF INTEREST

Orlando International Airport (MCO)



ORLANDO  
INTERNATIONAL  
AIRPORT

## **Workhorse Temps**

The company provides direct-hire, skilled labor, and payrolling services. They are based out of Orlando, FL and so offer local expertise to these services. Workhorse Temps can assist not only with payroll operations but also with construction/skilled labor needs for property construction/management/upkeep.

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## **Vistra Communications, LLC**

Marketing and Consulting agency offering full-service integrated marketing communications and consulting services. Vistra is amply experienced in front of shop marketing and design - building out bold exhibit spaces, digital display networks and backlit dioramas. They already have corporate partners MCO, TPA, and Washington area airports.

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## **Robinson Hill Group, LLC (RHG)**

Embodying the motto “delighting guests one experience at a time” RHG is an airport concessions and retail specialist who can service all things store operations, such as HR, administrative, and procurement duties. They have robust operations in Chicago and Washington and are certified in FL

# NEXT STEPS

1

## **CONTINUE QUANTITATIVE EVALUATION OF THE 8 HIGH POTENTIAL LOCATIONS**

Consider more nuanced aspects of airport growth and expansion rather than just considering international enplanement and COVID disruption. We recommend ARI take a more multi-dimensional quantitative approach to prospecting airports.

2

## **MORE IN-DEPTH RESEARCH ON THE DECISION-MAKING PROCESS**

While we mapped out the decision makers for each Airport, more examination is necessary to consider all the potential participants in awarding the contracts for DF retail.

3

## **CONSIDER THE INITIATION OF CONVERSATION WITH LOCAL DBE PARTNERS**

The ACDBE does not necessarily need to be local, we recommend ARI identify the best potential DBE's based on the contracts they seek to bid on. This means prioritizing a DBE's functionality versus its location.



**INTERNATIONAL  
SHOPPES**



# ALTERNATIVE OPTION: ACQUISITION OF INTERNATIONAL SHOPPES

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- Founded in 1951 by Herman Greenbaum and Fred Rosenberg
- Family owned and operated
- Currently 6 locations and 46 Shops: BOS, IAD, BWI, BDL, JFK, IAH
- Primarily North Eastern USA, except Houston
- Took a hit due to COVID
- Closed Newark Operations and some Boston Shops
- Around 500 Employees
- Annual Revenue - \$140 Million

**THANK YOU!**

Questions and Answers

# APPENDIX

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# SOURCES

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- <https://www.axnfactbook.com>
- <https://www.broward.org/airport/Pages/default.aspx>
- <https://www.broward.org/Airport/Business/Pages/Default.aspx>
- <https://www.panynj.gov/airports/en/index.html>
- <http://www.ejeretail.com>
- <https://www.lejeuneandassociates.com>
- [https://www.rlconsultingnyc.com/find\\_us/](https://www.rlconsultingnyc.com/find_us/)
- <https://www.lawa.org>
- <https://www.urwairports.com>
- <https://www.flylax.com/terminals/terminal1>
- <https://www.flylax.com/terminals/terminal-b>
- <https://www.brakkam.com>
- <https://www.veronicaperez.com>
- [https://performexcel.com/wp-content/uploads/2020/06/PEP\\_OASIS\\_Capabilities\\_Statement\\_2020\\_06\\_02.pdf](https://performexcel.com/wp-content/uploads/2020/06/PEP_OASIS_Capabilities_Statement_2020_06_02.pdf)
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- <https://www.vargasgroupinc.com/contact-us>
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- <https://slcairport.com>

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  - <https://airportretailers.com>
  - <http://www.arizonacorporates.com/corp/336274.html>
  - <https://www.regaliinc.com>
  - <https://www.jfkairport.com>
  - <https://www.transportation.gov/content/byrd-retail-group-llc>
  - <https://www.nycompanyregistry.com/companies/imagine-airport-ventures-llc/>
  - <https://www.imagine-ventures.com>
  - <https://theshekinahgroup.com>
  - <https://www.orlandoairports.net>
  - <https://orlandoairports.net/airport-business/#business-opportunities>
  - <https://www.workhorsestaff.com>
  - <https://www.consultvistra.com>
  - <https://robinsonhillusa.com>
  - <https://www.dufry.com/en>
  - <https://www.3sixtydutyfree.com>
  -
- <https://www.moodiedavittreport.com/los-angeles-world-airports-and-unibail-rodamco-westfield-reveal-leasing-opportunities-for-reimagined-terminal-3/>



# SOURCES

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- <https://idot.illinois.gov/doing-business/certifications/disadvantaged-business-enterprise-certification/il-ucp-directory/index>
- <https://fdotxwp02.dot.state.fl.us/EqualOpportunityOfficeBusinessDirectory/>
- <https://data.ny.gov/widgets/pfeu-dsx6>
- <https://www.dot.ny.gov/main/business-center/audit/dbe-certification> <https://dot.ca.gov/programs/civil-rights/dbe-certification-information>
- <https://www.rideuta.com/doing-business/disadvantaged-enterprises>
- <https://udot.utah.gov/connect/business/civil-rights/> <https://slairport.com/business-services/disadvantaged-business-enterprise/>
- <https://www.zoominfo.com/c/international-shoppes/346911519>
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# RFP Information Portals

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- MCO- Demand star Portal- Used by MCO, can be used for all RFPs
  - <https://network.demandstar.com/for-business/>
- ORD- iSupplier
  - <https://www.chicago.gov/city/en/depts/dps/isupplier/current-bids.htm>
- PANYNJ- PA Procure
  - <https://www.paprocure.com/irj/portal>
- TPA- OpenGov
  - <https://www.tampaairport.com/PRO-Solicitations-and-Contracts>
- SLC- Utah Supplier Portal
  - <https://solutions.scquest.com/apps/Router/SupplierLogin?CustOrg=StateOfUtah>
- LAX- RAMPLA
  - <https://www.rampla.org/s/>

# Link to Data Backup

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- [https://drive.google.com/drive/folders/1e6lG\\_r7ty9AerGwx\\_0YtH-Zvsjs3VLmu?usp=share\\_link](https://drive.google.com/drive/folders/1e6lG_r7ty9AerGwx_0YtH-Zvsjs3VLmu?usp=share_link)

# International EP Data

	2013	2014	2015	2016	2017	2018	2019	2020	2021	Pre COVID CAGR	Sensitivity to COVID
ATL	5,059,285	5,360,897	5,589,212	5,721,050	6,007,641	6,231,496	6,330,393	1,538,004	2,818,260	3.81%	-75.70%
BOS	2,260,507	2,489,591	2,757,043	3,276,955	3,585,272	3,784,659	4,141,210	909,004	1,269,161	10.62%	-78.05%
BWI	175,426	147,534	177,765	207,175	201,315	658,777	686,672	18,315	384,372	25.54%	-97.33%
CLT	1,400,609	1,449,707	1,402,278	0	1,638,302	1,601,070	1,791,015	849,999	1,010,656	4.18%	-52.54%
DEN	980,236	1,112,692	1,098,606	1,144,704	1,288,067	1,467,076	1,594,977	463,281	930,151	8.45%	-70.95%
DFW	3,291,888	3,480,507	3,828,507	4,095,286	4,337,050	4,344,622	4,770,187	1,706,612	3,005,344	6.38%	-64.22%
DTW	1,414,956	1,443,547	1,406,960	1,447,649	1,507,001	1,619,078	1,637,332	363,074	394,646	2.46%	-77.83%
EWR	5,655,985	5,860,490	5,927,568	6,165,634	6,433,116	7,071,860	7,192,292	1,035,468	3,287,843	4.09%	-85.60%
FLL	1,805,599	2,245,389	2,722,901	3,749,359	3,706,643	4,445,406	4,543,697	1,625,720	2,127,261	16.63%	-64.22%
IAD	3,280,149	3,408,021	2,952,240	3,465,607	3,596,329	3,939,536	3,900,731	952,671	1,625,139	2.93%	-75.58%
IAH	4,494,744	4,898,765	5,296,030	5,368,642	5,727,479	5,390,420	5,615,752	1,807,941	3,286,674	3.78%	-67.81%
JFK	13,178,045	13,988,981	14,891,331	15,692,227	16,031,315	16,772,853	17,114,275	2,638,785	6,304,479	4.45%	-84.58%
LAS	1,498,917	1,659,634	1,731,290	1,778,803	1,774,758	1,875,139	2,132,533	483,108	367,478	6.05%	-77.35%
LAX	8,923,658	9,590,445	10,390,714	11,463,448	12,464,644	13,036,552	12,840,241	6,438,926	3,889,512	6.25%	-49.85%
LGA	870,192	909,930	885,624	898,135	1,059,377	1,118,861	1,115,547	195,912	138,608	4.23%	-82.44%
MCO	1,956,577	2,057,323	2,400,904	2,758,469	2,836,039	3,158,033	3,584,896	1,567,101	615,805	10.62%	-56.29%
MIA	9,842,773	9,871,423	10,175,256	10,574,735	10,464,301	10,644,649	11,004,277	5,473,927	5,344,062	1.88%	-50.26%
MSP	1,152,853	1,192,756	1,327,416	389,600	1,434,635	1,497,495	1,646,011	412,685	375,419	6.11%	-74.93%
ORD	5,094,091	5,414,137	5,516,939	5,843,878	6,223,629	6,965,297	7,079,656	1,799,752	2,775,928	5.64%	-74.58%
PHL	2,250,633	2,269,286	2,269,623	2,082,323	1,984,893	2,117,425	2,033,647	343,696	451,731	-1.68%	-83.10%
SAN	308,036	334,203	347,466	379,569	419,231	512,661	522,520	121,736	96,773	9.21%	-76.70%
SEA	1,772,039	1,892,399	2,164,650	2,411,088	2,553,594	2,693,970	2,857,964	670,325	821,470	8.29%	-76.55%
SFO	4,840,512	5,107,071	5,554,640	6,078,819	6,642,080	7,040,356	7,548,553	1,609,116	1,614,453	7.69%	-78.68%
SLC	173,806	185,864	275,725	375,693	446,716	526,114	549,334	152,982	290,663	21.14%	-72.15%
TPA	263,556	304,767	354,613	421,569	450,465	483,568	619,615	150,361	84,096	15.31%	-68.91%



# Sales / EP Data

	<u>Sales per EP</u>			<u>International EPs</u>		<u>Duty Free Sales</u>	
	<u>2019</u>	<u>2022</u>		<u>2019</u>	<u>2021</u>	<u>2019</u>	<u>2021</u>
<b>MCO</b>	\$5.53	\$4.74		3,584,896	615,805	\$ 19,811,611	\$ 2,919,386
<b>FLL</b>	\$2.55	\$2.69		4,543,697	2,127,261	\$ 11,571,628	\$ 5,711,937
<b>TPA</b>	\$4.10	\$6.18		619,615	84,096	\$ 2,538,748	\$ 519,509
<b>JFK</b>	\$14.25	\$12.72		17,114,275	6,304,479	\$ 243,908,088	\$ 80,198,990
<b>EWR</b>	\$5.64	\$5.31		7,192,292	3,287,843	\$ 40,571,397	\$ 17,472,082
<b>LAX</b>	\$18.56	\$12.93		12,840,241	3,889,512	\$ 238,377,455	\$ 50,274,082
<b>SLC</b>	\$1.75	\$2.30		549,334	290,663	\$ 961,359	\$ 668,644
<b>ORD</b>	\$5.12	\$5.30		7,079,656	2,775,928	\$ 36,239,837	\$ 14,718,208