North America Travel Retail Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** Travel Retail & Duty Free (Retail)
> **Source:** https://www.mordorintelligence.com/industry-reports/travel-retail-market-in-north-america
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 13.24 billion
Projected Forecast (2031)	USD 13.24 billion
Growth Rate (CAGR)	3.79 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

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![Major players in North America Travel Retail industry](images/chart_2.png)

![North America Travel Retail Market (2025 - 2030)](images/chart_3.png)

![North America Travel Retail Market: Market Share by Product Type, 2025](images/chart_4.png)

![North America Travel Retail Market: Market Share by Distribution Channel, 2025](images/chart_5.png)

![NA Travel Retail CA.jpg](images/chart_6.png)

![footer background image](images/chart_9.png)

![Mordor Intelligence on Facebook](images/chart_11.svg)

![Mordor Intelligence on Pinterest](images/chart_13.svg)

![Mordor Intelligence on Instagram](images/chart_14.svg)

![ESOMAR](images/chart_16.png)

![GPTW](images/chart_18.png)
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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market OverviewStudy Period | 2020 - 2031 |
Forecast Data Period | 2026 - 2031 |
Base Year Market Size (2025) | USD 12.76 Billion |
Market Size (2026) | USD 13.24 Billion |
Market Size (2031) | USD 15.95 Billion |
Growth Rate (2026 - 2031) | 3.79 % |
Market Concentration | Medium |
Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

North America Travel Retail Market Analysis by Mordor IntelligenceThe North America travel retail market size was valued at USD 12.76 billion in 2025 and estimated to grow from USD 13.24 billion in 2026 to reach USD 15.95 billion by 2031, at a CAGR of 3.79% during the forecast period (2026-2031). Operators are transitioning from simple post-pandemic volume recovery to experience-led differentiation that persuades travellers to spend more on each trip, a strategic pivot validated by the finding that four out of five passengers will boost their spending when airports enhance the overall journey. International enplanements climbed to 23.234 million in December 2024, 7% above the prior year, providing a solid traffic base that underpins steady retail receipts [1]International Trade Administration, “December 2024 Air Passenger Travel,” trade.gov. This resilient demand enables concessionaires to test higher-margin assortments, deploy cashier-less technologies, and negotiate longer-term space rights in redeveloped terminals. As a result, the North America travel retail market continues to mature into a data-driven, passenger-centric ecosystem where experience quality outweighs simple product availability.

Key Report Takeaways* By product category, Fragrances & Cosmetics captured 32.05% of the North America travel retail market share in 2025 and is expanding at a 11.92% CAGR through 2031.
* By distribution channel, airports commanded 86.25% of the North America travel retail market size in 2025, while cruise liners are projected to log the fastest 8.96% CAGR toward 2031.
* By traveller demographic, leisure travellers accounted for 56.10% of the North America travel retail market share in 2025, whereas medical & wellness tourists are rising at a 13.04% CAGR to 2031.
* By geography, the United States held 70.88% of the North America travel retail market share in 2025, yet Mexico is forecast to grow at a 9.92% CAGR through 2031.

Key Market Trends

Market Trends and InsightsDrivers Impact Analysis of North America Travel Retail Market*Driver | (~) % Impact on CAGR Forecast | Geographic Relevance | Impact Timeline |
Rebound in international air passenger traffic | +1.2% | U.S.–Mexico corridors, pan-regional hubs | Short term (≤ 2 years) |
Expansion of airport retail footprints & concession upgrades | +0.8% | JFK, DFW, YYZ, YVR | Medium term (2-4 years) |
Rising spend per passenger via premiumization | +0.9% | Long-haul business routes | Long term (≥ 4 years) |
Strong performance of fragrances & cosmetics | +0.7% | International departure concourses | Medium term (2-4 years) |
Growth of private jet & FBO duty-free | +0.3% | U.S. domestic network, selective Canadian bases | Long term (≥ 4 years) |
Contactless checkout technologies | +0.4% | Major U.S. hubs, pilot rollouts across Canada | Short term (≤ 2 years) |
Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The North America travel retail market exhibits a moderately concentrated structure, with a significant portion of the market controlled by leading operators such as Avolta (a merger of Hudson and Dufry), HMSHost, Paradies Lagardère, WHSmith North America, and 3Sixty Duty Free. These dominant players collectively hold a substantial market share, yet the market dynamics continue to present opportunities for niche players to enter and establish a foothold. Technology is the dec isive competitive lever: Hudson’s cashier-less outlets powered by Amazon’s Just Walk Out algorithms cut transaction times and raise conversion, while Paradies Lagardère pilots Scan-Pay-Go mobile checkout lines that shorten queuing without sacrificing basket size.

WHSmith’s 2025 migration to a cloud-native retail platform enables unified inventory and CRM analytics across what will be 500 U.S. stores by 2028. Avolta pushes premium beauty environments and exclusive boutique collaborations, while HMSHost combines food & beverage with curated retail to extend dwell-time monetization. Emerging white-space includes private-jet duty-free, wellness-centric concepts, and omnichannel tie-ins that merge downtown flagship stores with airport collection points. Smaller regional specialists exploit local-culture storytelling to secure ACDBE-compliant contracts, keeping competitive pressure high despite the scale advantages of incumbents.

North America Travel Retail Industry Leaders* Dufry (Hudson)

* Duty Free Americas

* Paradies Lagardère

* WH Smith (InMotion)

* WH Smith (InMotion)

* *Disclaimer: Major Players sorted in no particular order

Scope Methodology P Space

For this study, the North America travel retail market includes retail sales of consumer goods made to travelers inside travel-linked locations, such as airports and other transit points, across the United States, Canada, and Mexico.

Scope exclusions: Sales from ordinary city retail that are not tied to a travel location, plus non-retail services (such as ticketing, food service, and parking), are excluded.

Segmentation Container

* By Product Type* Fashion and Accessories
* Wine and Spirits
* Tobacco
* Food and Confectionery
* Fragrances and Cosmetics
* Other Product Types (Stationery, Electronics, Watches, Jewelry, etc.)

* By Distribution Channel* Airports
* Cruise Liners
* Railway Stations
* Other Distribution Channels

* By Traveler Demographics* Business Travelers
* Leisure Travelers
* Visiting Friends and Relatives (VFR)
* Medical and Wellness Tourists
* Student Travelers

* By Geography* Canada
* United States
* Mexico

Frequently Asked Questions

How large is the North America travel retail in 2026?

Sales reached USD 13.24 billion in 2026.

Which product category leads duty-free sales in the region?

Fragrances & Cosmetics command 32.05% share and post the quickest 11.92% CAGR through 2031.

What is the projected CAGR for the sector between 2026 and 2031?

Spending is forecast to rise at a 3.79% CAGR over the period.

Which traveler demographic is expanding the fastest?

Medical & wellness tourists are advancing at a 13.04% CAGR to 2031.

Why do airports remain the dominant retail channel?

Airports hold 86.25% share thanks to captive footfall, duty-free pricing and sustained infrastructure investment.

Which country shows the fastest growth through 2031?

Mexico is projected to progress at a 9.92% CAGR as tourism infrastructure and cross-border travel expand.