

Asia-Pacific Inflight Catering - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The Asia-Pacific Inflight Catering Market size is estimated at USD 4.16 billion in 2024, and is expected to reach USD 6.60 billion by 2029, growing at a CAGR of 9.76% during the forecast period (2024-2029).

The rising emphasis on customer-centric food menus is driving the Asia-Pacific inflight catering services market, as most airlines are adding new items to their menus to provide better quality food to passengers by keeping their preferences in mind. The aftermath of the pandemic led many catering companies in the region to implement newer methods of providing in-flight catering to attract new air travelers and improve the inflight dining experience. In recent years, various airlines have partnered with world-renowned chefs to delight and enhance the in-flight dining experience of the passengers. Several companies are also focusing on providing a curated menu to their customers. For instance, in April 2023, Air India announced that they had remapped how they serve meals onboard the aircraft to attract its customers.

However, the growing operational challenges in the coming years will hamper the market's growth during the forecast period. The increasing number of air passengers led to increased operational challenges, with caterers facing difficulties such as last-minute requests, sometimes 15 minutes before aircraft departure, short turnaround times, aircraft changes, delays, airport operational limitations, and timely food delivery according to customer specifications. Despite this, with the increasing air travel in this region, the induction of new destinations and new long-haul flights may create future opportunities for the Asia-Pacific inflight catering market. Such factors are expected to drive the market positively during the forecast period.

Asia Pacific Inflight Catering Services Market Trends

The Meals Segment is Projected to Occupy the Largest Market Share During the Forecast Period

During air travel, inflight food plays a significant role in shaping passengers' perceptions of airline service. Airlines in Asia-Pacific have recognized this and made concerted efforts to cater to their passengers' diverse dietary needs and preferences. As a result, the availability and quality of meals offered by airlines in the region have grown significantly in recent years.

The region's demand for the meals segment is driven by the annual rising air passenger traffic growth as more air travel leads to more food sales on board. Additionally, the inflight dinners for most regional airlines include meat, a salad or vegetable, a small roll, and a dessert. A cooked breakfast or lighter continental-style meal may be an option during morning flights. For instance, in March 2024, Malaysia Airlines launched its new Best of Asia menu. The airline launched this menu to provide passengers with an enhanced in-flight dining experience.

Moreover, the growth of the vegan and vegetarian population is increasing rapidly in the region due to factors such as altruism, environmental concerns, etc. The trend of growing vegetarianism has increased the demand for vegan or vegetarian meals. Moreover, the growth of health-conscious people has resulted in the growing popularity of gluten-free and low-salt meals, as they are becoming the major food offerings under the special meals for airlines. For instance, in January 2024, Emirates announced that a significant increase in vegan meal consumption was noted on its flight routes to China, Japan, and the Philippines. The airline also mentioned that there was a demand for plant-based meals in Southeast Asia, as the airline saw a growth of 5% in 2023 for plant-based meals compared to 2022. Such factors are expected to drive the demand for this segment in the region during the forecast period.

The Inflight Catering Market in India May Experience the Highest Growth

The Indian inflight catering market is expected to grow at the highest rate during the forecast period, owing to the growing aviation market in the country. The boom in air travel in India is adding a new dimension to the inflight catering services business. Around 20 million people used domestic airline services, and around 10 million

passengers used international airline services in the country.

With an expected increase in traffic of 20% over the next two years, the inflight meal business is poised to register significant growth. Besides, the entry of domestic airlines into intercontinental routes is expected to create competition among caterers, forcing them to be innovative. Vistara is offering a "Chef On-board" program in partnership with the airline's caterers, Taj SATS Air Catering Limited. According to the company, Chef On-board is an innovative and first-of-its-kind initiative in India, where chefs will take direct and instant customer feedback on the new menu introduced across the network. Such efforts to enhance the inflight catering experience may help the growth of the players in the country.

Nevertheless, the largest inflight catering market in the region currently belongs to China due to the country's high aviation activity. To cater to the growing aviation demand, airlines in China are procuring new aircraft and introducing new routes. To maintain their competitiveness, Chinese airlines are re-designing their inflight menus to increase their profitability while maintaining food quality. In the Chinese market, due to the high competition in the airline market and low-profit growth of small- and medium-sized air carriers from additional supporting services, airlines have been dropping the idea of providing complimentary inflight meals to economy-class passengers, which is expected to reduce the growth of the market during the forecast period.

Asia-Pacific Inflight Catering Industry Overview

The market for inflight catering in the Asia-Pacific is semi-consolidated, with few players accounting for the majority share of the market. Gate Gourmet (Gate Group), LSG Sky Chefs (LSG Group), SATS, Cathay Pacific Catering Services (HK) Limited, and Emirates Flight Catering Company LLC are prominent players with a strong presence in the Asia-Pacific inflight catering services market.

These companies are increasing their geographic presence in the market by introducing innovative food options. This includes new menu items and a more comprehensive range of choices, such as vegetarian and gluten-free options, to cater to a diverse range of travelers. For instance, in October 2022, ANA started offering new vegan, vegetarian, and gluten-free meals on international flights. Similarly, Singapore Airlines and other airlines have taken initiatives to provide services similar to those of ANA. With a few key players dominating the market, competition is high, and companies are constantly

looking for new ways to differentiate themselves and provide a better travel experience for their passengers.

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