

B2B Travel Market Outlook 2026-2034: Market Share, and Growth Analysis By Type (Transportation, Travel Accommodation, Corporate Cab Service), By Application (Commercial, Industrial), By End-User

<https://marketpublishers.com/r/B15D897D11ACEN.html>

Date: November 2025

Pages: 160

Price: US\$ 3,950.00 (Single User License)

ID: B15D897D11ACEN

Abstracts

The B2B Travel Market is valued at USD 43.83 billion in 2025 and is projected to grow at a CAGR of 14% to reach USD 142.5 billion by 2034.

B2B Travel Market

The B2B travel market connects suppliers - airlines, hotels, rail, car rental, activities, insurance, and fintech - with intermediaries such as travel management companies (TMCs), online booking tools (OBTs), bedbanks, consolidators/wholesalers, destination management companies (DMCs), and corporate buyers. Top applications and end-uses include managed corporate travel, meetings & events (MICE), project/crew and marine travel, academic/government programs, SME self-service via OBTs, and embedded travel inside vertical platforms and super-apps. Key trends feature the shift to offer/order retailing (NDC/ONE Order) and rich ancillaries, omnichannel content aggregation across GDS + direct connects + bedbanks, dynamic packaging with activities and ground, and automation from trip approval to disruption servicing via AI. Growth is propelled by the return of corporate travel in hybrid work models, SME digitization, cross-border ecommerce requiring flexible payments, and demand for duty-of-care, sustainability reporting, and real-time policy controls. The competitive landscape spans global TMCs integrating procurement and expense, fast-scaling OBTs, regional consolidators with long-tail content, API aggregators normalizing supplier schemas, and fintech providers offering virtual cards, FX wallets, and fraud controls. Differentiation increasingly hinges on servicing reliability for reissues/IRROPs, breadth and parity of air + hotel content, transparent fees, configurable approval workflows, and

sustainability/CO2 insights. Headwinds include content fragmentation, uneven NDC servicing parity, rate integrity challenges, supplier direct-distribution strategies, settlement disputes/chargebacks, and tightening data privacy/security expectations. Overall, B2B travel is moving from ticket issuance to end-to-end traveler experience and spend governance, with platform scale and workflow depth determining durable advantage.

B2B Travel Market Key Insights

Content fragmentation and the race to parity. Buyers want the same or better fares and ancillaries available direct, within managed channels. Aggregators must normalize offers across GDS, NDC, LCC APIs, rail, and hotels while preserving fare rules and servicing metadata. Parity now includes seat maps, bags, bundles, and corporate waivers. Where parity lags, leakage to supplier direct grows. Vendors that surface “best available path” with audit trails win trust and share.

From PNR/Ticket to Offer/Order retailing. NDC and ONE Order shift distribution toward continuous pricing and order records that unify air + ancillaries. This promises better personalization and simplified back-office, but only if mid/back-office and duty-of-care systems ingest orders cleanly. Interline and reissue flows remain pain points; scalable fallback to EDIFACT/GDS is still required. Platforms investing in dual-rail servicing achieve stability during transition. Education and KPIs align stakeholders on benefits beyond fare access.

Automation-first servicing becomes table stakes. AI triage, robotic reissues, and self-service change flows compress handling time during disruptions. Smart queues prioritize high-risk PNRs and VIPs; policy-aware rebooking guards cost and traveler wellbeing. Conversational agents handle routine queries while pushing complex cases to expert desks with full context. Automation that is auditable and PCI/GDPR-compliant reduces leakage and opex. Measurable SLAs convert automation into procurement outcomes.

Hotels: rate integrity and attachment are decisive. Corporate programs blend chain deals, dynamic discounts, and long-tail via bedbanks/DMCs. Challenges include rate parity, tax handling, and cancellation compliance across sources. Attaching hotel to air boosts policy compliance and improves total trip visibility. Content deduplication, amenity/CO2 normalization, and last-room availability guard traveler satisfaction. Auto-invoice and folio capture streamline

reconciliation and duty-of-care.

Payments and fintech redefine unit economics. Virtual cards reduce risk, enable just-in-time funding, and simplify reconciliation with rich remittance data. Multi-currency wallets hedge FX exposure; local methods unlock cross-border SME demand. Controls (MCC, caps, time limits) cut fraud and chargebacks. Supplier pay (vCard, bank, RTP) becomes a competitive lever in negotiations. Fintech margins help buffer lower distribution fees while improving cash flow predictability.

Sustainability and duty-of-care shift selection logic. CO2 estimates by flight, aircraft, and hotel energy profile now influence approval and policy. Rail substitution, nonstop preference, and cabin class nudges are encoded into OBTs. Offsetting is giving way to in-journey reduction tactics and SAF procurement reporting. Real-time risk maps, traveler tracking, and check-in automations underpin employer obligations. Vendors that make compliance “invisible” drive adoption without user friction.

SME digitization and embedded travel expand TAM. SMEs adopt lightweight OBT + card + expense bundles that mimic enterprise control without heavy implementation. Vertical SaaS and super-apps embed travel through B2B2X APIs, monetizing fintech and ads. Pre-negotiated content and quick KYC accelerate onboarding. Education and templated policies reduce admin load. Stickiness comes from integrations into calendars, HRIS, and collaboration tools.

MICE and group travel professionalize sourcing. Hybrid events require flexible contracts, attrition risk tools, and real-time rooming management. Dynamic pricing and availability feeds improve venue shortlisting. Sustainability criteria (waste, energy, travel footprint) show up in RFPs. Consolidators offering group air desks plus hotel allotments gain advantage. Post-event analytics tie spend to engagement outcomes, strengthening procurement’s hand.

Security, privacy, and data governance as brand moat. Frequent integrations and payment flows elevate risk. ISO/SOC certifications, data residency options, least-privilege access, and tokenization are now RFP defaults. Consent management and DPIAs are expected in regulated sectors. Observability across API calls improves incident response and SLA compliance. Vendors demonstrating low false-positive fraud controls protect traveler experience and

supplier relations.

Value migration to platforms and services. Revenue mixes shift from transaction fees toward subscriptions, fintech take rates, data products, and premium servicing tiers. Open APIs and marketplaces invite partners (insurance, lounges, ground, experiences) while reducing build time. Change-management, traveler training, and executive dashboards convert software into measurable savings. Platforms with healthy partner ecosystems out-innovate point solutions.

B2B Travel Market Regional Analysis

North America

Market depth is anchored by mature corporate programs, high adoption of OBTs and expense suites, and aggressive supplier retailing via NDC. TMCs balance dual-rail air servicing while building fintech and analytics layers. Rail is expanding in the Northeast, yet air remains dominant for intercity. Data privacy, ADA accessibility, and sustainability reporting feature in RFPs. SME growth favors quick-start bundles and card-first models with robust duty-of-care.

Europe

Strong rail networks, multi-country compliance, and sustainability targets push modal shift and CO2-aware policies. Buyers demand parity across GDS/NDC with proven reissue workflows. VAT reclaim, per-diem complexity, and data residency influence platform choice. MICE recovery is robust, with hybrid formats and stricter attrition clauses. Regional TMCs win with multilingual servicing and local supplier relationships complemented by pan-EU tech stacks.

Asia-Pacific

Diverse markets blend corporate mega-hubs and fast-digitizing SMEs. Super-apps, mobile-first OBTs, and local payment methods (wallets, BNPL) are critical. LCC content and regional rail are must-have alongside full-service carriers. Cross-border compliance, visas, and tax nuances elevate the need for local DMC partners. Japan/Korea emphasize duty-of-care compliance and service quality; India/SEA prioritize price, automation, and rapid onboarding.

Middle East & Africa

Hub carriers and hospitality pipelines support premium corporate and MICE flows, while government and energy sectors drive project/crew travel. Buyers expect high-touch disruption management and security visibility for remote sites. Local settlement rails and bilingual servicing matter. Emerging NDC adoption coexists with consolidator strength. Infrastructure investment and events calendars create cyclical spikes requiring scalable group air/hotel capacity.

South & Central America

Demand concentrates in regional corporate corridors, commodity sectors, and government. Currency volatility and credit constraints make virtual cards and FX-smart settlement attractive. Content breadth (LCCs, regional hotel chains) and reliable servicing through disruptions differentiate providers. Compliance with local tax/fiscal rules and e-invoicing is vital. Partnerships with strong regional consolidators and layered OBT + expense bundles accelerate SME penetration.

B2B Travel Market Segmentation

By Type

Transportation

Travel Accommodation

Corporate Cab Service

By Application

Commercial

Industrial

By End-User

Automotive

Chemical

FMCG

Tourism

Others

Key Market players

American Express Global Business Travel (Amex GBT), CWT, BCD Travel, FCM Travel, Corporate Travel Management (CTM), Navan (formerly TripActions), TravelPerk, SAP Concur, Egencia, ATP, HRS Group, Hotelbeds, WebBeds (Webjet), Amadeus, Sabre, Travelport, Expedia Group (Expedia Partner Solutions), Booking Holdings (Booking.com for Business), Trip.com Group, TBO.com (Travel Boutique Online)

B2B Travel Market Analytics

The report employs rigorous tools, including Porter's Five Forces, value chain mapping, and scenario-based modelling, to assess supply–demand dynamics. Cross-sector influences from parent, derived, and substitute markets are evaluated to identify risks and opportunities. Trade and pricing analytics provide an up-to-date view of international flows, including leading exporters, importers, and regional price trends. Macroeconomic indicators, policy frameworks such as carbon pricing and energy security strategies, and evolving consumer behaviour are considered in forecasting scenarios. Recent deal flows, partnerships, and technology innovations are incorporated to assess their impact on future market performance.

B2B Travel Market Competitive Intelligence

The competitive landscape is mapped through OG Analysis' proprietary frameworks, profiling leading companies with details on business models, product portfolios, financial performance, and strategic initiatives. Key developments such as mergers & acquisitions, technology collaborations, investment inflows, and regional expansions are analyzed for their competitive impact. The report also identifies emerging players and innovative startups contributing to market disruption. Regional insights highlight the

most promising investment destinations, regulatory landscapes, and evolving partnerships across energy and industrial corridors.

Countries Covered

North America — B2B Travel market data and outlook to 2034

United States

Canada

Mexico

Europe — B2B Travel market data and outlook to 2034

Germany

United Kingdom

France

Italy

Spain

BeNeLux

Russia

Sweden

Asia-Pacific — B2B Travel market data and outlook to 2034

China

Japan

India

South Korea

Australia

Indonesia

Malaysia

Vietnam

Middle East and Africa — B2B Travel market data and outlook to 2034

Saudi Arabia

South Africa

Iran

UAE

Egypt

South and Central America — B2B Travel market data and outlook to 2034

Brazil

Argentina

Chile

Peru

* We can include data and analysis of additional countries on demand.

Research Methodology

This study combines primary inputs from industry experts across the B2B Travel value chain with secondary data from associations, government publications, trade

databases, and company disclosures. Proprietary modeling techniques, including data triangulation, statistical correlation, and scenario planning, are applied to deliver reliable market sizing and forecasting.

Key Questions Addressed

What is the current and forecast market size of the B2B Travel industry at global, regional, and country levels?

Which types, applications, and technologies present the highest growth potential?

How are supply chains adapting to geopolitical and economic shocks?

What role do policy frameworks, trade flows, and sustainability targets play in shaping demand?

Who are the leading players, and how are their strategies evolving in the face of global uncertainty?

Which regional “hotspots” and customer segments will outpace the market, and what go-to-market and partnership models best support entry and expansion?

Where are the most investable opportunities—across technology roadmaps, sustainability-linked innovation, and M&A—and what is the best segment to invest over the next 3–5 years?

Your Key Takeaways from the B2B Travel Market Report

Global B2B Travel market size and growth projections (CAGR), 2024-2034

Impact of Russia-Ukraine, Israel-Palestine, and Hamas conflicts on B2B Travel trade, costs, and supply chains

B2B Travel market size, share, and outlook across 5 regions and 27 countries, 2023-2034

B2B Travel market size, CAGR, and market share of key products, applications,

and end-user verticals, 2023-2034

Short- and long-term B2B Travel market trends, drivers, restraints, and opportunities

Porter's Five Forces analysis, technological developments, and B2B Travel supply chain analysis

B2B Travel trade analysis, B2B Travel market price analysis, and B2B Travel supply/demand dynamics

Profiles of 5 leading companies—overview, key strategies, financials, and products

Latest B2B Travel market news and developments

Additional Support

With the purchase of this report, you will receive

An updated PDF report and an MS Excel data workbook containing all market tables and figures for easy analysis.

7-day post-sale analyst support for clarifications and in-scope supplementary data, ensuring the deliverable aligns precisely with your requirements.

Complimentary report update to incorporate the latest available data and the impact of recent market developments.

* The updated report will be delivered within 3 working days

Contents

1. TABLE OF CONTENTS

- 1.1 List of Tables
- 1.2 List of Figures

2. GLOBAL B2B TRAVEL MARKET SUMMARY, 2025

- 2.1 B2B Travel Industry Overview
 - 2.1.1 Global B2B Travel Market Revenues (In US\$ billion)
- 2.2 B2B Travel Market Scope
- 2.3 Research Methodology

3. B2B TRAVEL MARKET INSIGHTS, 2024-2034

- 3.1 B2B Travel Market Drivers
- 3.2 B2B Travel Market Restraints
- 3.3 B2B Travel Market Opportunities
- 3.4 B2B Travel Market Challenges
- 3.5 Tariff Impact on Global B2B Travel Supply Chain Patterns

4. B2B TRAVEL MARKET ANALYTICS

- 4.1 B2B Travel Market Size and Share, Key Products, 2025 Vs 2034
- 4.2 B2B Travel Market Size and Share, Dominant Applications, 2025 Vs 2034
- 4.3 B2B Travel Market Size and Share, Leading End Uses, 2025 Vs 2034
- 4.4 B2B Travel Market Size and Share, High Growth Countries, 2025 Vs 2034
- 4.5 Five Forces Analysis for Global B2B Travel Market
 - 4.5.1 B2B Travel Industry Attractiveness Index, 2025
 - 4.5.2 B2B Travel Supplier Intelligence
 - 4.5.3 B2B Travel Buyer Intelligence
 - 4.5.4 B2B Travel Competition Intelligence
 - 4.5.5 B2B Travel Product Alternatives and Substitutes Intelligence
 - 4.5.6 B2B Travel Market Entry Intelligence

5. GLOBAL B2B TRAVEL MARKET STATISTICS – INDUSTRY REVENUE, MARKET SHARE, GROWTH TRENDS AND FORECAST BY SEGMENTS, TO 2034

- 5.1 World B2B Travel Market Size, Potential and Growth Outlook, 2024- 2034 (\$ billion)
- 5.1 Global B2B Travel Sales Outlook and CAGR Growth By Type, 2024- 2034 (\$ billion)
- 5.2 Global B2B Travel Sales Outlook and CAGR Growth By Application, 2024- 2034 (\$ billion)
- 5.3 Global B2B Travel Sales Outlook and CAGR Growth By End-User, 2024- 2034 (\$ billion)
- 5.4 Global B2B Travel Market Sales Outlook and Growth by Region, 2024- 2034 (\$ billion)

6. ASIA PACIFIC B2B TRAVEL INDUSTRY STATISTICS – MARKET SIZE, SHARE, COMPETITION AND OUTLOOK

- 6.1 Asia Pacific B2B Travel Market Insights, 2025
- 6.2 Asia Pacific B2B Travel Market Revenue Forecast By Type, 2024- 2034 (USD billion)
- 6.3 Asia Pacific B2B Travel Market Revenue Forecast By Application, 2024- 2034 (USD billion)
- 6.4 Asia Pacific B2B Travel Market Revenue Forecast By End-User, 2024- 2034 (USD billion)
- 6.5 Asia Pacific B2B Travel Market Revenue Forecast by Country, 2024- 2034 (USD billion)
 - 6.5.1 China B2B Travel Market Size, Opportunities, Growth 2024- 2034
 - 6.5.2 India B2B Travel Market Size, Opportunities, Growth 2024- 2034
 - 6.5.3 Japan B2B Travel Market Size, Opportunities, Growth 2024- 2034
 - 6.5.4 Australia B2B Travel Market Size, Opportunities, Growth 2024- 2034

7. EUROPE B2B TRAVEL MARKET DATA, PENETRATION, AND BUSINESS PROSPECTS TO 2034

- 7.1 Europe B2B Travel Market Key Findings, 2025
- 7.2 Europe B2B Travel Market Size and Percentage Breakdown By Type, 2024- 2034 (USD billion)
- 7.3 Europe B2B Travel Market Size and Percentage Breakdown By Application, 2024- 2034 (USD billion)
- 7.4 Europe B2B Travel Market Size and Percentage Breakdown By End-User, 2024- 2034 (USD billion)
- 7.5 Europe B2B Travel Market Size and Percentage Breakdown by Country, 2024- 2034 (USD billion)
 - 7.5.1 Germany B2B Travel Market Size, Trends, Growth Outlook to 2034

- 7.5.2 United Kingdom B2B Travel Market Size, Trends, Growth Outlook to 2034
- 7.5.2 France B2B Travel Market Size, Trends, Growth Outlook to 2034
- 7.5.2 Italy B2B Travel Market Size, Trends, Growth Outlook to 2034
- 7.5.2 Spain B2B Travel Market Size, Trends, Growth Outlook to 2034

8. NORTH AMERICA B2B TRAVEL MARKET SIZE, GROWTH TRENDS, AND FUTURE PROSPECTS TO 2034

- 8.1 North America Snapshot, 2025
- 8.2 North America B2B Travel Market Analysis and Outlook By Type, 2024- 2034 (\$ billion)
- 8.3 North America B2B Travel Market Analysis and Outlook By Application, 2024- 2034 (\$ billion)
- 8.4 North America B2B Travel Market Analysis and Outlook By End-User, 2024- 2034 (\$ billion)
- 8.5 North America B2B Travel Market Analysis and Outlook by Country, 2024- 2034 (\$ billion)
 - 8.5.1 United States B2B Travel Market Size, Share, Growth Trends and Forecast, 2024- 2034
 - 8.5.1 Canada B2B Travel Market Size, Share, Growth Trends and Forecast, 2024- 2034
 - 8.5.1 Mexico B2B Travel Market Size, Share, Growth Trends and Forecast, 2024- 2034

9. SOUTH AND CENTRAL AMERICA B2B TRAVEL MARKET DRIVERS, CHALLENGES, AND FUTURE PROSPECTS

- 9.1 Latin America B2B Travel Market Data, 2025
- 9.2 Latin America B2B Travel Market Future By Type, 2024- 2034 (\$ billion)
- 9.3 Latin America B2B Travel Market Future By Application, 2024- 2034 (\$ billion)
- 9.4 Latin America B2B Travel Market Future By End-User, 2024- 2034 (\$ billion)
- 9.5 Latin America B2B Travel Market Future by Country, 2024- 2034 (\$ billion)
 - 9.5.1 Brazil B2B Travel Market Size, Share and Opportunities to 2034
 - 9.5.2 Argentina B2B Travel Market Size, Share and Opportunities to 2034

10. MIDDLE EAST AFRICA B2B TRAVEL MARKET OUTLOOK AND GROWTH PROSPECTS

- 10.1 Middle East Africa Overview, 2025

10.2 Middle East Africa B2B Travel Market Statistics By Type, 2024- 2034 (USD billion)

10.3 Middle East Africa B2B Travel Market Statistics By Application, 2024- 2034 (USD billion)

10.4 Middle East Africa B2B Travel Market Statistics By End-User, 2024- 2034 (USD billion)

10.5 Middle East Africa B2B Travel Market Statistics by Country, 2024- 2034 (USD billion)

10.5.1 Middle East B2B Travel Market Value, Trends, Growth Forecasts to 2034

10.5.2 Africa B2B Travel Market Value, Trends, Growth Forecasts to 2034

11. B2B TRAVEL MARKET STRUCTURE AND COMPETITIVE LANDSCAPE

11.1 Key Companies in B2B Travel Industry

11.2 B2B Travel Business Overview

11.3 B2B Travel Product Portfolio Analysis

11.4 Financial Analysis

11.5 SWOT Analysis

12 APPENDIX

12.1 Global B2B Travel Market Volume (Tons)

12.1 Global B2B Travel Trade and Price Analysis

12.2 B2B Travel Parent Market and Other Relevant Analysis

12.3 Publisher Expertise

12.2 B2B Travel Industry Report Sources and MethodologyOGAMV25R1667

I would like to order

Product name: B2B Travel Market Outlook 2026-2034: Market Share, and Growth Analysis By Type (Transportation, Travel Accommodation, Corporate Cab Service), By Application (Commercial, Industrial), By End-User

Product link: <https://marketpublishers.com/r/B15D897D11ACEN.html>

Price: US\$ 3,950.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/B15D897D11ACEN.html>