

Middle East & Africa Airline Ancillary Services Market Forecast to 2030 - Regional Analysis- by Type (Baggage Fees, On-Board Retail and A La Carte Services, Airline Retail, and FFP Mile Sales) and Carrier Type (Full-Service Carriers and Low-Cost Carriers)

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Abstracts

The Middle East & Africa airline ancillary services market was valued at US\$ 17.85 billion in 2022 and is expected to reach US\$ 68.82 billion by 2030; it is estimated to grow at a CAGR of 18.4% from 2022 to 2030.

Rising Preference of Air Travel by Middle-Income Passengers fuels the Middle East & Africa Airline Ancillary Services Market

As per International Air Transport Association (IATA), the number of passengers traveling by air is expected to reach ~7.8 billion by 2036. The rapidly emerging middle-class segment majorly influences the growth in passengers travelling through airways in developing economies. In October 2020, UNWTO and IATA inked a Memorandum of Understanding to work together to restart global tourism. This agreement was focused on enhancing the confidence of the general public in air travel, which further helped increase air traffic.

An exponential growth of working groups in developing countries has increased freight traffic disposable income. As the world recovers from economic contractions, the demand for air travel increases. The rising air travel demand has resulted in the augmented production of commercial aircraft, which has considerably contributed to the growth of various ancillary services, such as in-flight Wi-Fi, excess luggage, food and beverages, and in-flight shopping. According to IATA, in 2019, there were 4.54 billion air passengers, and in 2023, global air passengers reached 95% of pre-pandemic levels, which is 4.35 billion people. These mounting numbers of passengers across the world

are demanding various parameters to make flight hours more exciting and comfortable. In-flight catering or in-flight culinary is one of the key trends among full-service carriers as well as low-cost carriers. The increasing focus on offering enhanced services to flight passengers and the rising number of aviation passengers worldwide are driving the Middle East & Africa airline ancillary services market.

Middle East & Africa Airline Ancillary Services Market Overview

The Middle East has demonstrated relatively flat trends in the airline sector over the past few years and is expected to exhibit moderate growth in the coming years. Despite limited economic activity, the region has recorded higher air traffic capacity, resulting in increased revenue passenger kilometers. Positive travel trends in Saudi Arabia and Oman present opportunities for ancillary service providers. Saudi Arabia's return to pre-pandemic travel demand and increased capacity provide potential for ancillary services. The rising tourism in Oman has increased the demand for ancillary services such as car rentals and guided tours. The investment made by governments to enhance the inflight customer experience is also anticipated to contribute to the market outlook in the Middle East.

Middle East & Africa Airline Ancillary Services Market Revenue and Forecast to 2030 (US\$ Bn)

Middle East & Africa Airline Ancillary Services Market Segmentation

The Middle East & Africa airline ancillary services market is segmented into type, carrier type, and country.

Based on type, the Middle East & Africa airline ancillary services market is divided into baggage fees, on-board retail and a la carte services, airline retail, and FFP mile sales. The baggage fees segment held the largest market share in 2022.

By carrier type, the Middle East & Africa airline ancillary services market is bifurcated into full-service carriers and low-cost carriers. The full-service carriers segment held a larger market share in 2022.

Based on country, the Middle East & Africa airline ancillary services market is segmented into South Africa, Saudi Arabia, the UAE, and the Rest of Middle East & Africa. The UAE dominated the Middle East & Africa airline ancillary services market in 2022.

Air France KLM SA, Delta Air Lines Inc, Deutsche Lufthansa AG, The Emirates, and United Airlines Holdings Inc are some of the leading companies operating in the Middle East & Africa airline ancillary services market.

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