



AIRLINE DISTRIBUTION AND RETAILING UPDATES

Weeks 31 & 32, 2024

This edition contains news on:

- Air France-KLM
- Breeze Airways
- Emirates
- Ethiopian Airlines
- Finnair
- Maldivian
- Ryanair
- Amex GBT
- Flyr

Air France - KLM increase surcharges

The airline group has increased its NDC via GDS surcharge. The surcharge is applied to Amadeus and Travelport NDC bookings.

The group's EDIFACT surcharge increased in July by 3 EUR to 24 EUR, marking a third increase in two years.

NDC surcharge (Amadeus and Travelport)

Home markets	Rest of Europe	North America	Rest of World
~€1.70	~€3.00	~€3.80	€5.30

EDIFACT surcharge evolution



Ryanair adds aggregator agreements

Ryanair has named Travelfusion and Paxport as its first approved aggregators.

Ryanair disabled Travelfusion's access in 2023 over screenscraping claims, cutting off several travel management companies from its content.

Selected highlights of Ryanair's corporate partnerships

November 2023	January 2024	February 2024	August 2024
Ryanair content removed from Travelfusion	Ryanair partners with Concur Travel for a direct connection	Navan reinstates Ryanair basic fares without Travelfusion	Ryanair names Travelfusion as an approved aggregator

Travelport to launch Finnair NDC

Travelport and Finnair have expanded their relationship, however the date for distributing Finnair's content is yet to be announced.

The agreement will provide access to Finnair's NDC-only content, which has been available since 2021.

Travelport 2024 NDC rollouts

Avianca

Emirates

Iberia

Malaysia Airlines

Qatar Airways

GDS's revenues rise

Both Amadeus and Sabre reported increased distribution revenue vs H1 2023. The growth was mostly due to increases in unit revenue. Growth of bookings remains low.

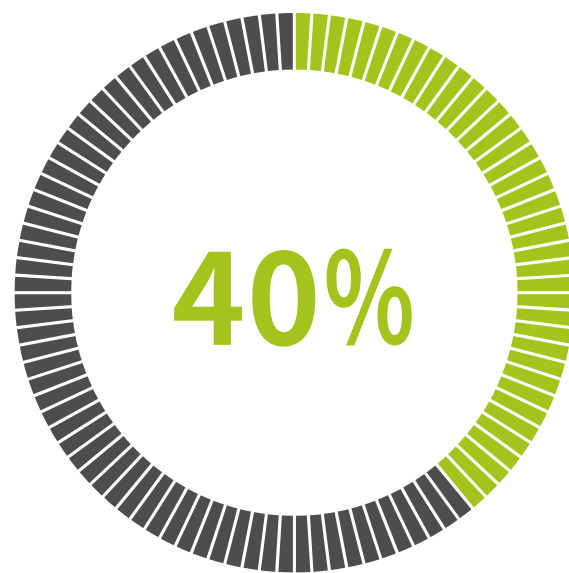
Year-on-year change - H1'24 vs H1'23

<i>Change vs. H1'23</i>	Sabre	Amadeus
Air distribution revenue	+6% (€1,028 million)	+11% (€1,506 million)
Air distribution bookings	No change (161 million)	+3% (242 million)

TravelPerk integrates Emirates NDC

The partnership marks TravelPerk's 20th airline NDC connection.

TravelPerk is a business travel management platform that recently made headlines over their acquisition of AmTrav and a 125 million EUR funding.



40% of total TravelPerk global bookings are via NDC

Amex GBT/ CWT acquisition extended

Amex GBT has announced that the completion of the deal, initially set for H2 2024, is now delayed to Q1 2025 due to UK and possible US investigations.

In March 2024, Amex GBT announced its \$570 million acquisition of CWT. Both companies are amongst the biggest TMCs globally.

In June 2024, the UK Competition and Markets Authority began investigating the merger's potential monopolistic effects.

Impact of the acquisition for Amex GBT

+4000

new accounts

+45%

total transaction
volume

+34%

revenue

Flyr's runway increased by \$295 million

Flyr, who is building AI-based offer and order management systems, has raised additional funding.

The funding round, led by WestCap, also included an investment by Avianca.

Flyr's total funding is in excess of \$500 million. The funds will be used to expand the company and its offerings.

Flyr's airline clients include:

Air New Zealand

Avianca

Azul Brazilian Airlines

JetBlue

Virgin Atlantic

Breeze Airways content on AmTrav

AmTrav is the first corporate booking tool to sell Breeze Airways content. As a part of the launch Breeze has also launched an exclusive BreezeCorp bundle.

Breeze recently signed distribution agreements with Expedia and Priceline.

Breeze Airways is a US-based low cost carrier, launched in 2021. It has a focus on under-served US markets.

The airline was founded by David Neeleman. He has launched four other airlines, including Azul, JetBlue, WestJet, and Morris Air (sold to Southwest).

US DOT ancillary fee disclosure ruling delayed

The U.S. Fifth Circuit Court of Appeals has agreed to a stay request by airlines. This will likely delay or disband the DOT's ruling. The appeals court will provide a final decision in due course.

In April, the US Department of Transportation released a final rule on the disclosure of ancillary fees. Airlines must provide ancillary fee information to travel agents by October 2024 and in direct channels by April 2025.

Several airline associations filed a suit to invalidate the rule and issue a stay until a court decision is reached.



More industry news

Maldivian has entered into a strategic partnership with **Amadeus**, furthering its foothold in the traditional GDS environment.

Tiket.com, an Indonesian OTA, has expanded its technology integration with **Amadeus**. The deal includes access to Amadeus Travel Platform which includes EDIFACT and NDC content.

Ethiopian Airlines has adopted **Lufthansa Systems'** SIRAX Revenue Accounting and SIRAX One-order based solution.

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