

# Soaring Skies

## Travel Trends and Outlook for Middle East and Africa

**Marina Giuliano**, VP Brands, Retailers & Media

November 2024

**MEA: the fastest growing region**



# New world, new speed

1

Growing global travel demand, requires attention to different speed and geopolitical and economic uncertainties.

2

MEA resilient amid instability, seizing opportunities.

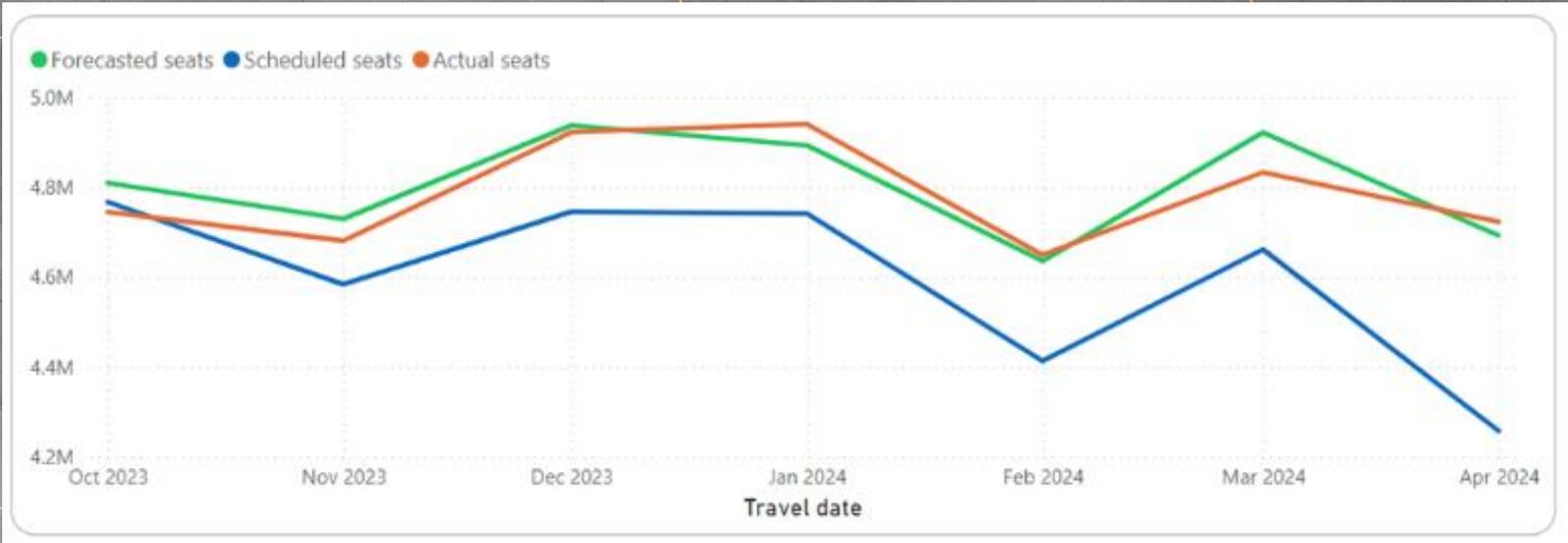
3

Airports regain Chinese travellers unevenly: challenges and opportunities.

# New aviation industry challenges require data-driven approach and strong agility



# Volatility of capacity for flights arriving to Dubai



# Global overview

# MEA Traffic To Outpace Global Growth In Coming Years

International worldwide traffic by departure region in 2025 and 2026; % difference vs previous year

## Global International Traffic

VS Previous Year

**+14%**  
2024

**+5%**  
2025

**+3%**  
2026

**Middle East and Africa**

**+8%**

**+7%**

**+4%**

**The Americas**

**+10%**

**+5%**

**+3%**

**Europe**

**+10%**

**+4%**

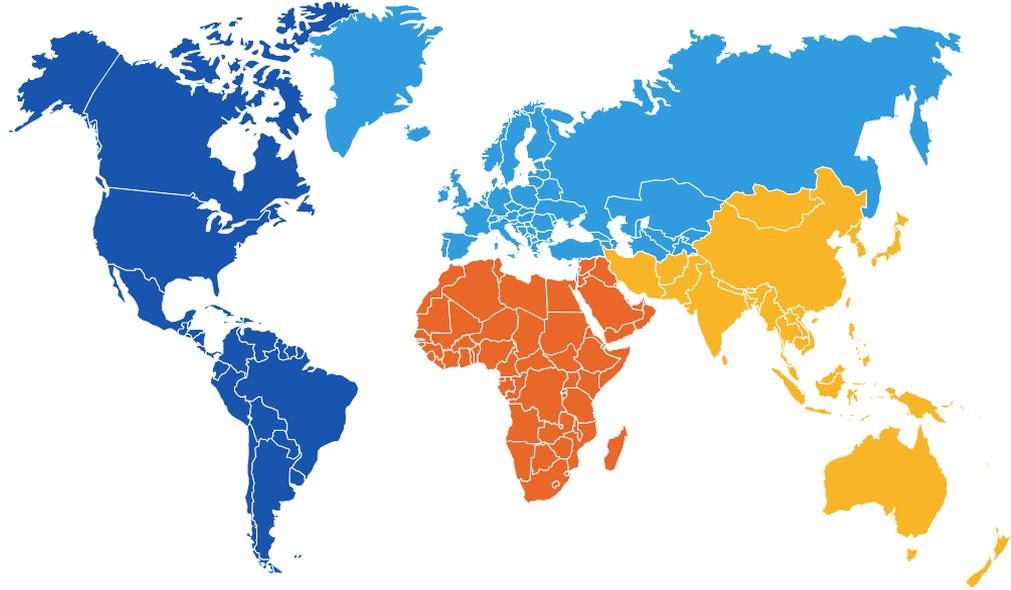
**+3%**

**Asia Pacific**

**+28%**

**+7%**

**+2%**



Source: ForwardKeys Mid-Term Forecasts

# International Traffic Restored To Pre-pandemic Levels

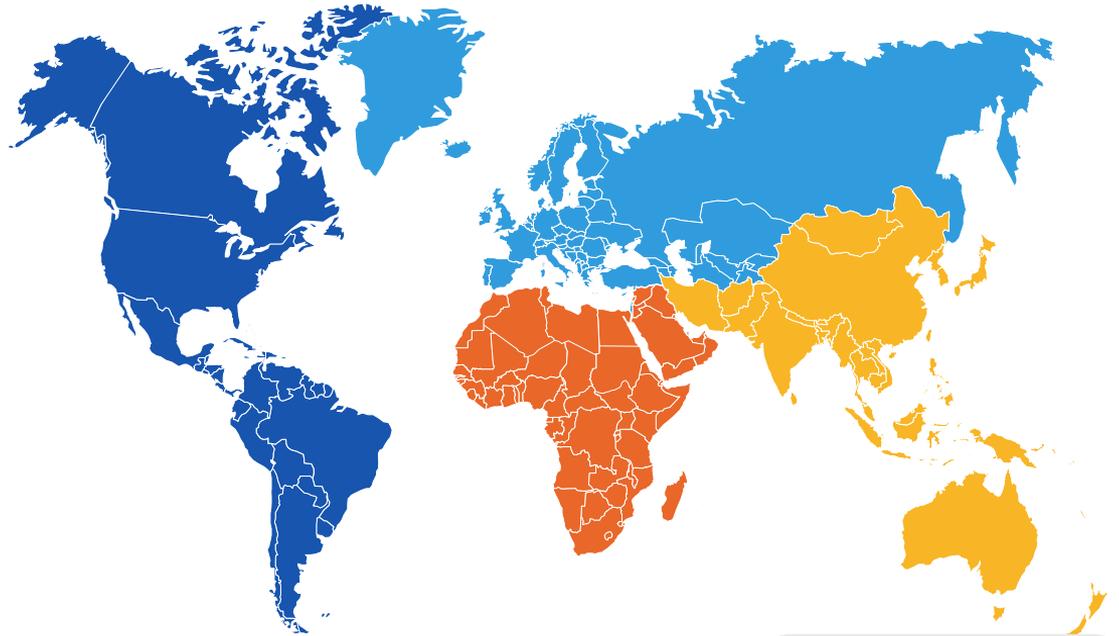
International worldwide traffic by departure region in 2024; % difference vs 2019

## 2024 International Traffic

**+1%**

VS 2019

Total Traffic 2024:  
**2.0 Bn**



Source: ForwardKeys Total Air Market

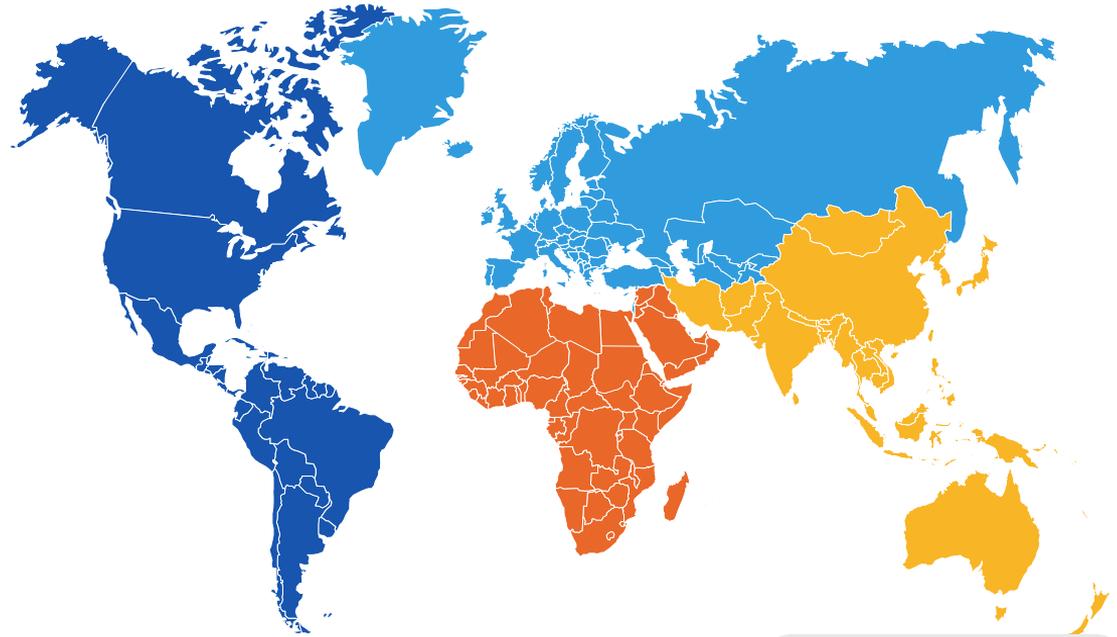
# Traffic Recovery Varies By Region, With MEA At The Forefront

International worldwide traffic by departure region in 2024; % difference vs 2019

## 2024 International Traffic

**+1%**

VS 2019

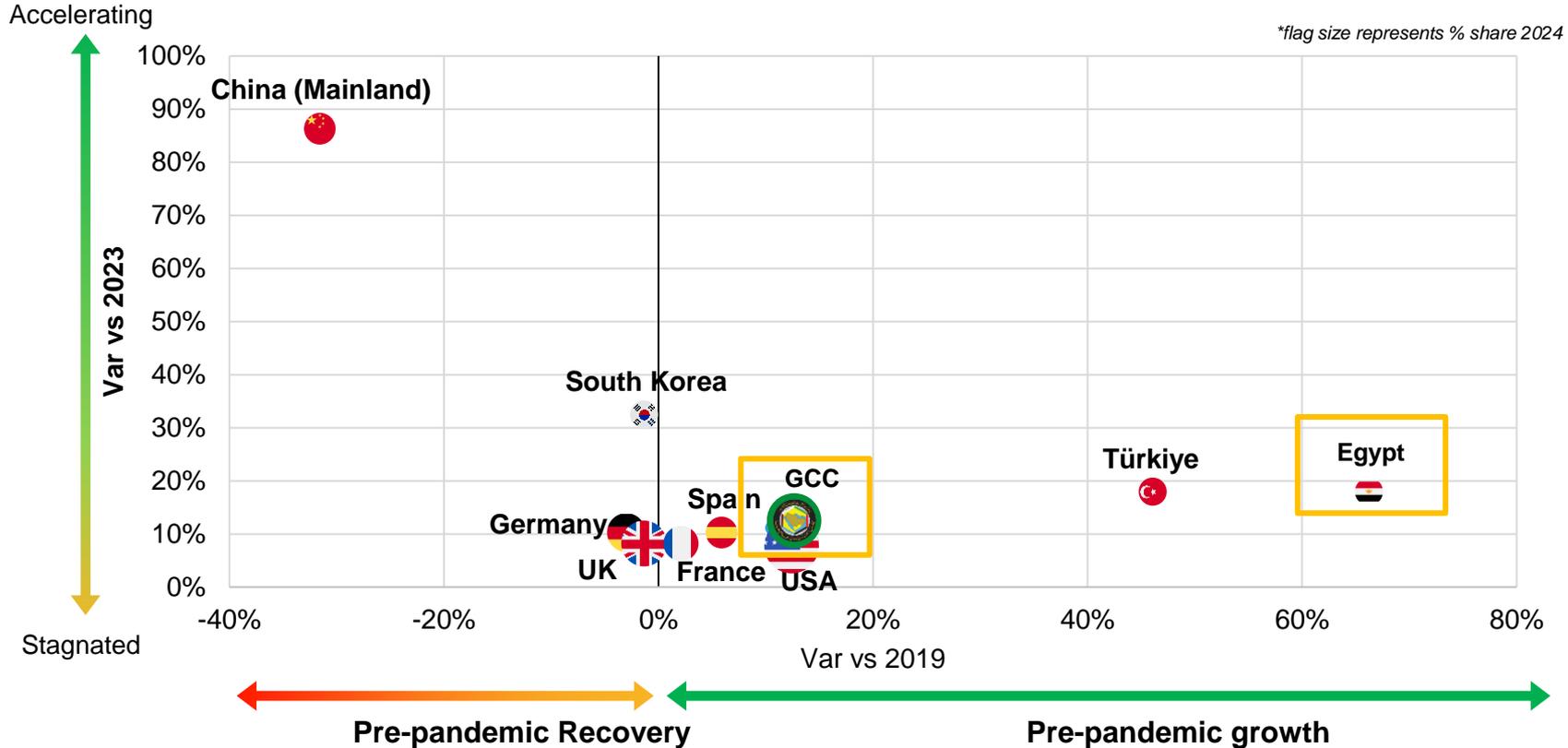


	Var vs 2019	% share
<b>MIDDLE EAST AND AFRICA</b>	<b>+10%</b>	<b>14%</b>
<b>THE AMERICAS</b>	<b>+9%</b>	<b>16%</b>
<b>EUROPE</b>	<b>+2%</b>	<b>46%</b>
<b>ASIA PACIFIC</b>	<b>-10%</b>	<b>24%</b>

Source: ForwardKeys Total Air Market

# Key Nationalities: 2024 Recovery Tracker

International departures in 2024, from key outbound nationalities; var vs 2023 and 2019



# Regional overview

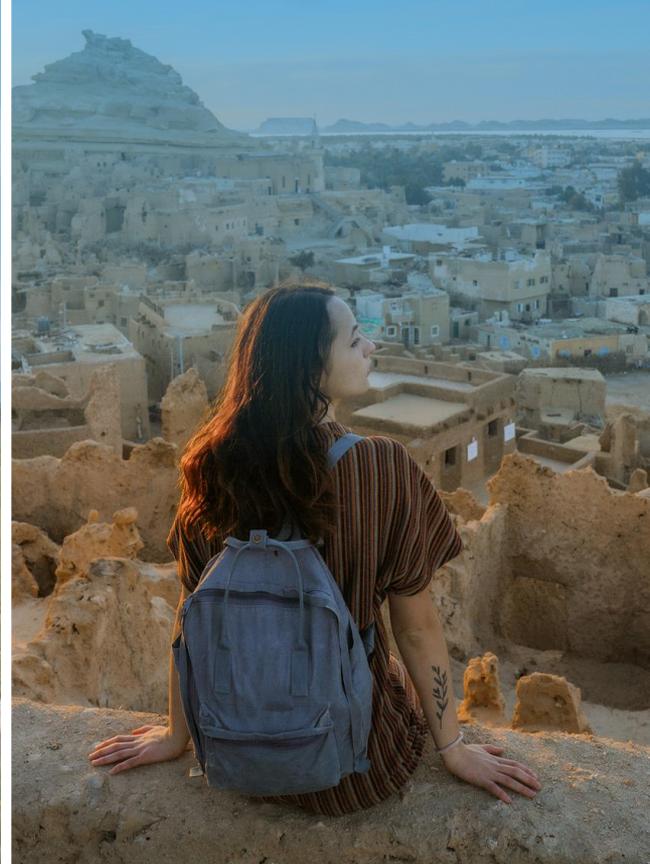
# Economic growth



# Expansion of aviation infrastructure and connectivity



# Tourism development

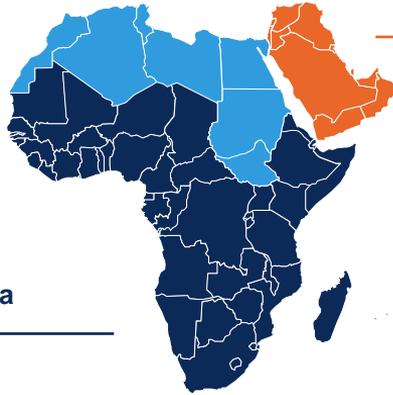


# 2024 International Traffic Expands Across All MEA Subregions

International departing traffic in 2024; var vs previous year

**North Africa**  
**2024: +16%**  
% share: 18%

**Middle East**  
**2024: +5%**  
% share: 64%



**Sub-Saharan Africa**  
**2024: +12%**  
% share: 18%

Total Pax MEA 2024:

**270,3m**

**+8%**

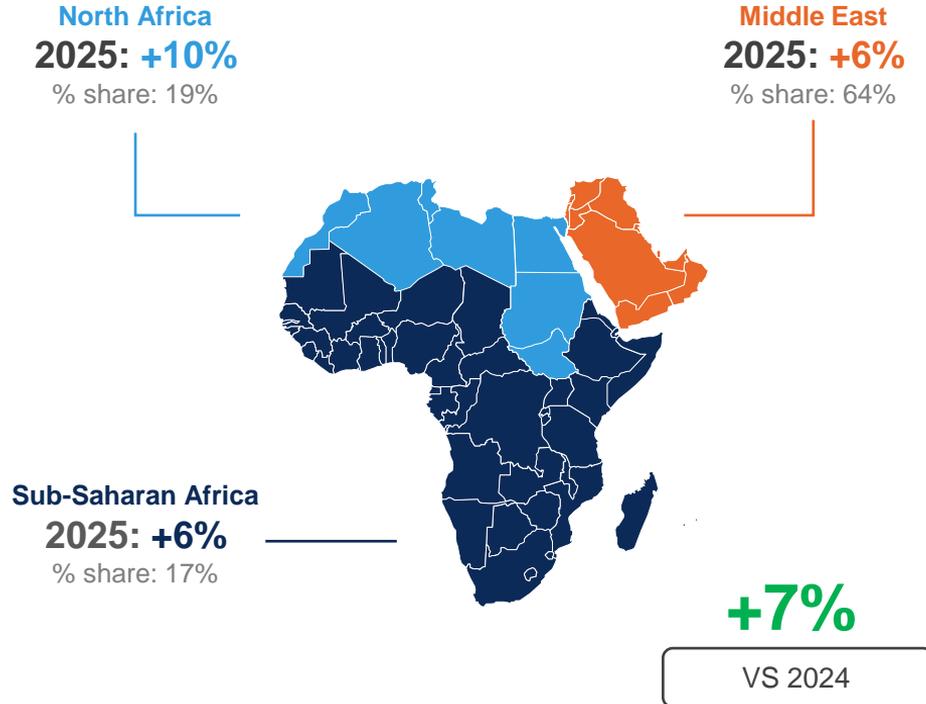
VS Previous Year

Region Name	2024 % Share	2024 vs 2023
Middle East	64%	+5%
Northern Africa	18%	+16%
Eastern Africa	9%	+15%
Western Africa	5%	+9%
Southern Africa	2%	+10%
Central Africa	2%	+7%

Source: ForwardKeys Total Air Market

# Forecast 2025: Sustained Regional Growth On The Horizon

International departing traffic in 2025; var vs previous year



Region Name	2025 % Share	2025 vs 2024
Middle East	64%	<b>+6%</b>
Northern Africa	19%	<b>+10%</b>
Eastern Africa	9%	<b>+6%</b>
Western Africa	4%	<b>+2%</b>
Southern Africa	3%	<b>+17%</b>
Central Africa	1%	<b>-4%</b>

Source: ForwardKeys Mid-Term Forecasts

# African region



# Top Nationalities Departing From Africa

International traffic departing from Africa in 2024; var vs previous year

Top Nationalities (% Share)		Var vs 2023
Egypt	13,7%	+20%
Morocco	8,1%	+21%
France	7,1%	+13%
South Africa	4,3%	+10%
Tunisia	3,8%	+7%
Algeria	3,5%	+18%
UK	3,4%	+21%
Ethiopia	2,7%	+21%
Saudi Arabia	2,6%	+14%
USA	2,4%	+5%
<b>TOTAL TRAFFIC from Africa</b>		<b>96.5 M</b>

Source: ForwardKeys Total Air Market

# Top Performing Airports In Africa

International traffic departing from Africa in 2024; var vs previous year

Top Airports in Africa (% Share)		Var vs 2023
Hurghada International (HRG)	 3,5%	+34%
Menara (RAK)	 4,6%	+32%
Houari Boumediene (ALG)	 3,6%	+17%
Addis Ababa Bole International (ADD)	 8,3%	+16%
Sharm El Sheikh (SSH)	 2,0%	+16%
Cairo International (CAI)	 13,9%	+13%
Jomo Kenyatta International (NBO)	 3,6%	+13%
Mohamed V International (CMN)	 5,1%	+12%
Tunis-Carthage International (TUN)	 3,7%	+9%
O.R. Tambo International (JNB)	 4,2%	+8%

\*considering airports that represent more than 2% share

Source: ForwardKeys Total Air Market

# Middle Eastern region



# Middle East as a Destination



# The Middle East Is A Luxury Tourism Powerhouse

International Arrivals to the Middle East between January and October; var vs 2023

Destination Country	2024 vs 2023
Qatar	+32%
Bahrain	+8%
Iraq	+7%
Kuwait	+7%
Oman	+6%
United Arab Emirates	+5%
Saudi Arabia	+4%
Jordan	-21%
Lebanon	-30%
<b>MIDDLE EAST</b>	<b>+3%</b>

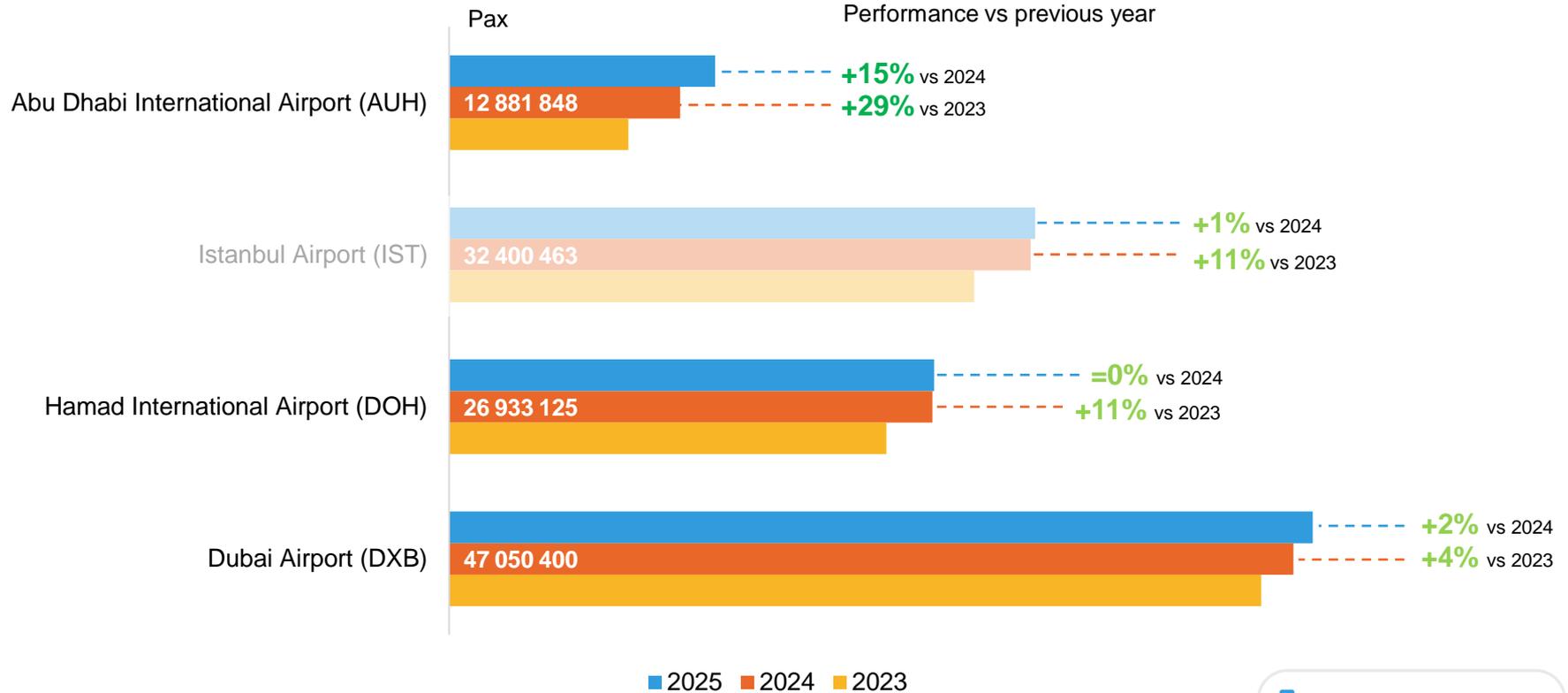
 Source: ForwardKeys Arrivals and Stays

# Middle East as a Global Travel Hub



# Abu Dhabi Dominates Among Regional Hubs

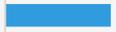
Departing International Traffic from key regional hubs in 2025, 2024 and 2023



Source: ForwardKeys Total Air Market

# Top Performing Airports In The Middle East

International traffic departing from the Middle East in 2024; var vs previous year

Top Airports in the Middle East (% Share)		Var vs 2023
Abu Dhabi International (AUH)	 7,4%	+29%
Sharjah International (SHJ)	 4,6%	+16%
King Khalid International (RUH)	 5,3%	+13%
King Abdulaziz International (JED)	 9,7%	+11%
Hamad International (DOH)	 15,5%	+11%
Bahrain International (BAH)	 2,9%	+11%
Prince Mohammad Bin Abdulaziz..	 2,2%	+9%
Dubai (DXB)	 27,1%	+4%
Muscat International (MCT)	 3,3%	-1%
Queen Alia International (AMM)	 2,6%	-4%

\*considering airports that represent more than 2% share

Source: ForwardKeys Total Air Market

# Connectivity Focus: GCC Enhances Links to Key International Markets

Scheduled Seat Capacity for international flights between GCC nations and key destination regions, in 2024; vs 2023

Key Destination Regions	Seats 2024	2024 vs 2023	2024 vs 2019
Mainland China	2,690,571	+45%	+4%
Middle East	62,984,170	+10%	+20%
Europe	42,138,013	+9%	+16%
Asia Pacific (excluding Mainland China)	61,952,172	+8%	+14%
Africa	10,015,026	+6%	=0%
North America	5,457,248	+5%	+25%
Latin America	457,004	-6%	+6%
<b>TOTAL GCC</b>	<b>185,694,204</b>	<b>+9%</b>	<b>+16%</b>

Source: ForwardKeys Seat Capacity Data



ForwardKeys



# Spotlight on Chinese travellers

Forwardkeys.com  
#ForwardKeys



# Chinese Tourism Long Road to Recovery...

International departures from China between January 2023 and September 2024; % difference vs 2019

= 2019 volumes



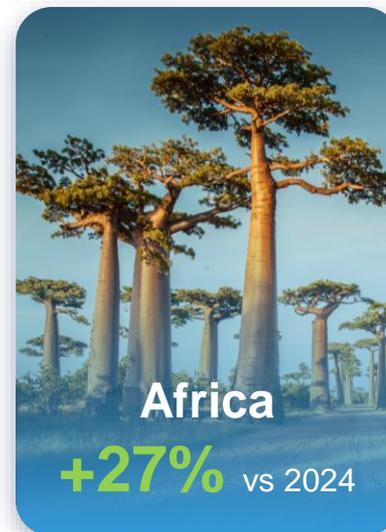
Source: ForwardKeys Total Air Market

## ... continues in 2025

Chinese travellers departing from global regions in 2025; % difference vs previous year



## 2025 Chinese Outbound Traffic from:



Source: ForwardKeys Total Air Market

# The Uneven Recovery Chinese Traffic in MEA hubs

Chinese travellers departing from Middle East and African Airports in 2024; % difference vs 2019



TOP MEA AIRPORTS for CHINESE TRAVELLERS	% share 2024	2024 vs 2019
Dubai (DXB)	38%	-25%
Hamad International (DOH)	19%	+20%
Addis Ababa Bole International (ADD)	10%	-9%
Cairo International (CAI)	9%	+24%
Abu Dhabi International (AUH)	5%	-62%
Imam Khomeini International (IKA)	2%	-47%
Jomo Kenyatta International (NBO)	2%	-28%
King Abdulaziz International (JED)	2%	+29%
King Khalid International (RUH)	1.5%	+54%
O.R. Tambo International (JNB)	1.3%	-48%
<b>TOTAL MEA</b>	<b>100%</b>	<b>-23%</b>

# Adapting to seize emerging opportunities

International traffic departing from the Middle East in 2024; var vs previous year

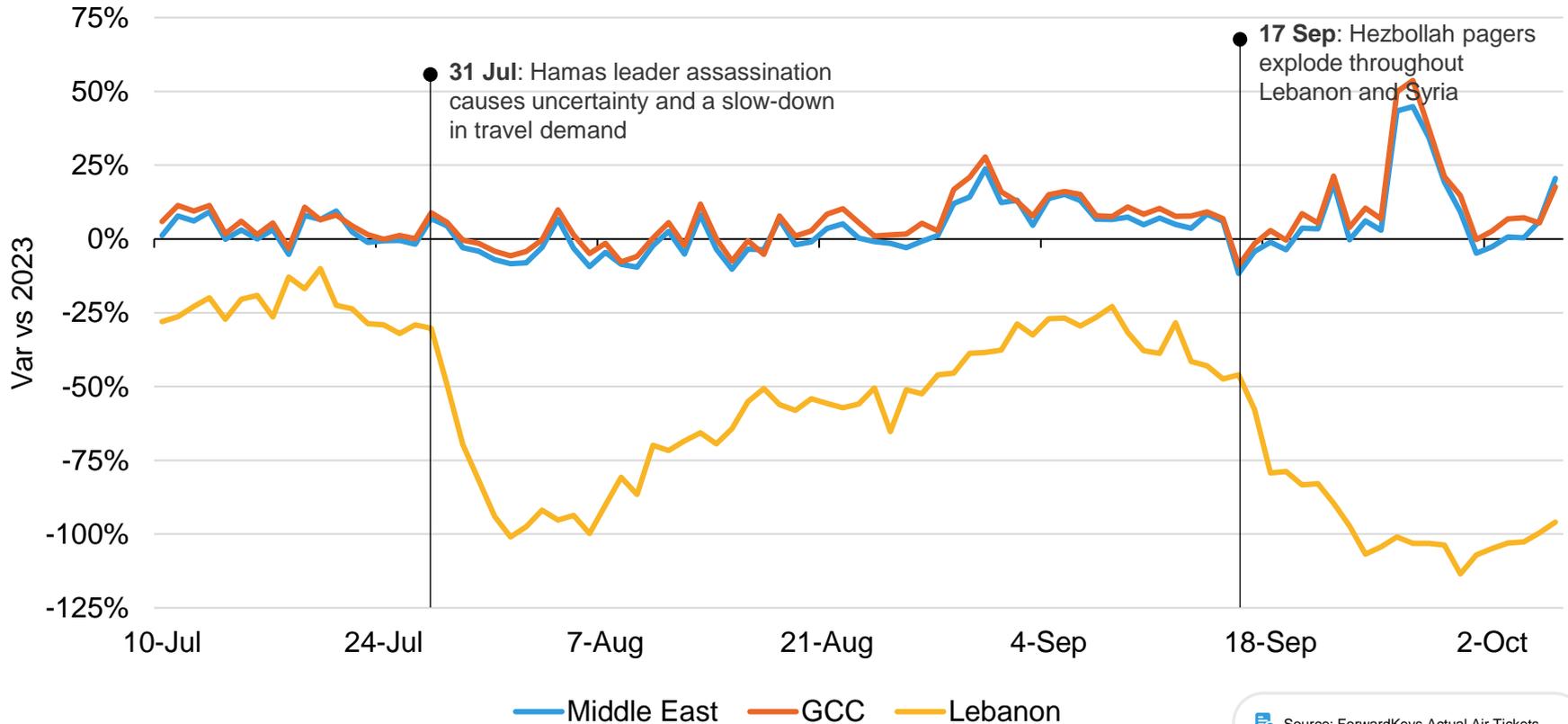
Top Nationalities (% Share)		Var vs 2023
UAE	18,1%	+8%
Saudi Arabia	15,3%	+13%
Qatar	4,7%	+2%
Kuwait	4,5%	-6%
India	4,5%	+9%
UK	4,1%	+9%
Israel	3,6%	-25%
USA	3,1%	-7%
Oman	2,4%	+5%
Iran	2,2%	+16%
<b>TOTAL TRAFFIC</b>		<b>173,830,534</b>

Source: ForwardKeys Total Air Market



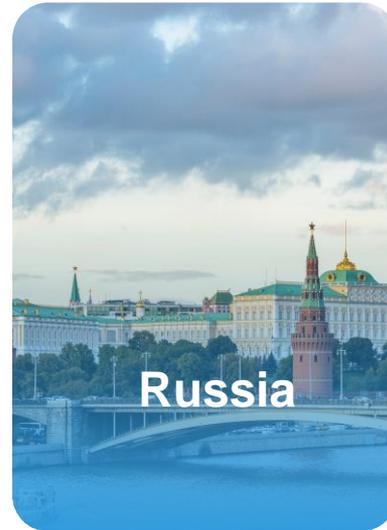
# GCC Travel Demand Persists Amid Regional Instability

Tickets issued between 10 Jul and 6 Oct, for future departing traffic from the Middle East; var vs 2023



Source: ForwardKeys Actual Air Tickets

# Impact of geopolitical dynamics on travel & tourism





# Take-Aways



1

**Expanding retail footprint  
in new strategic touchpoints in  
the Middle East**

2

**Stronger presence in Africa,  
to capitalize its evolving aviation  
landscape and tourism boost**



3

**Chinese luxury travellers  
remain vital, while emerging  
nationalities gain importance.**

# THANK YOU

## Marina Giuliano

*VP – Brands, Retailers and Media*

✉ [marina.giuliano@forwardkeys.com](mailto:marina.giuliano@forwardkeys.com)

Check our latest analysis at  
[www.forwardkeys.com](http://www.forwardkeys.com)

