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Middle East and Africa

Air Traffic Outlook

November 2026

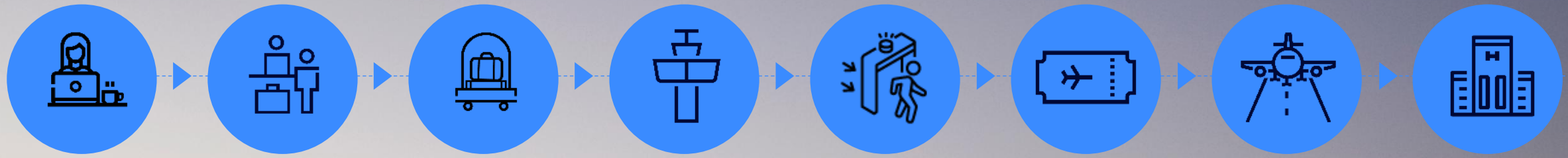
Marina Giuliano,

VP Brands, Retailers and Media, Amadeus



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The company behind all your journeys



Covering every step of the travel experience

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Today's journey

01. The MEA outlook
02. Middle East
03. Africa
04. Africa spotlights
05. Looking ahead



The MEA outlook

One region, two different growth stories

01

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International **travel demand** is expected to grow in the first half of 2027

2026
H1 2027

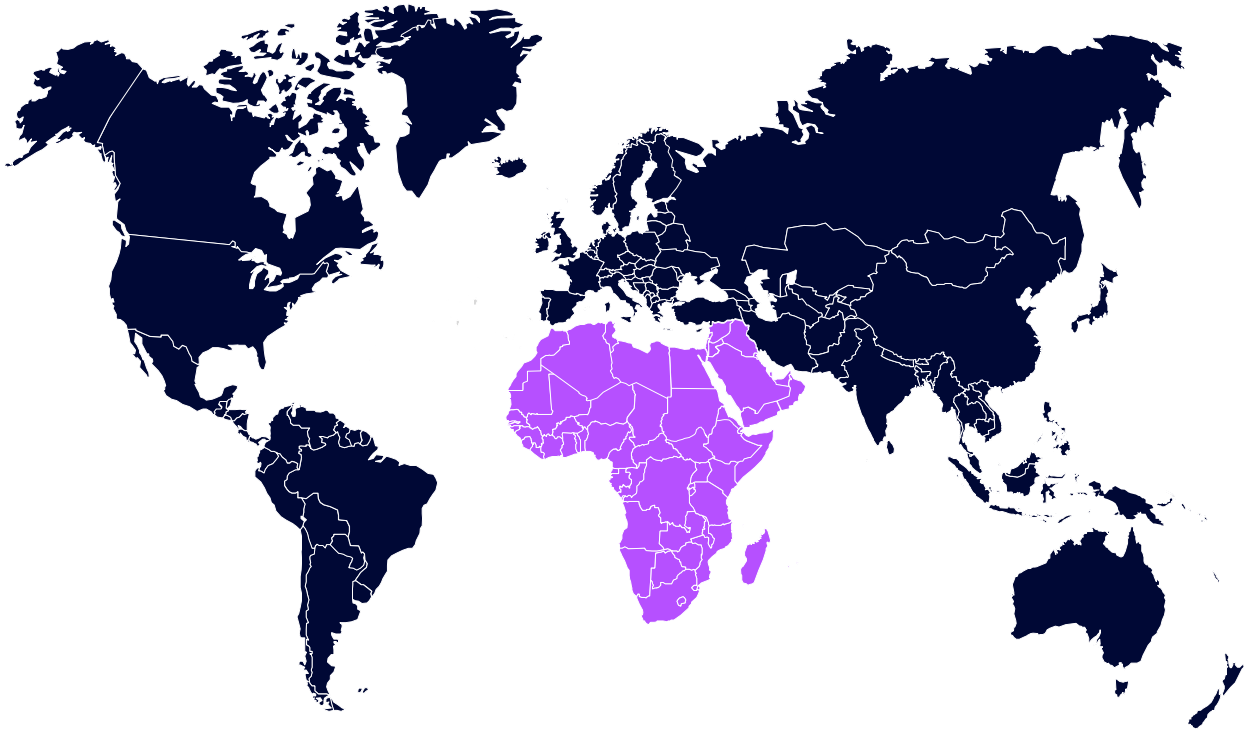
Worldwide International Departures

2026:

+2% YoY

Jan – Jun 2027 | Current outlook

+6% YoY



	The Americas	Europe	Africa | Middle East	Asia Pacific
2026:	+1% YoY	+4% YoY	+6% | -10% YoY	+4% YoY
Jan – Jun 2027 | Current outlook:	+5% YoY	+3% YoY	+12% | +22% YoY	+5% YoY

amadeus **Source: Amadeus Departures and Transfers**

Forecast figures are estimates based on airline capacity models and scheduling assumptions and are therefore subject to future revisions and adjustments.

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Airlines are backing international travel with added capacity

2026
H1 2027

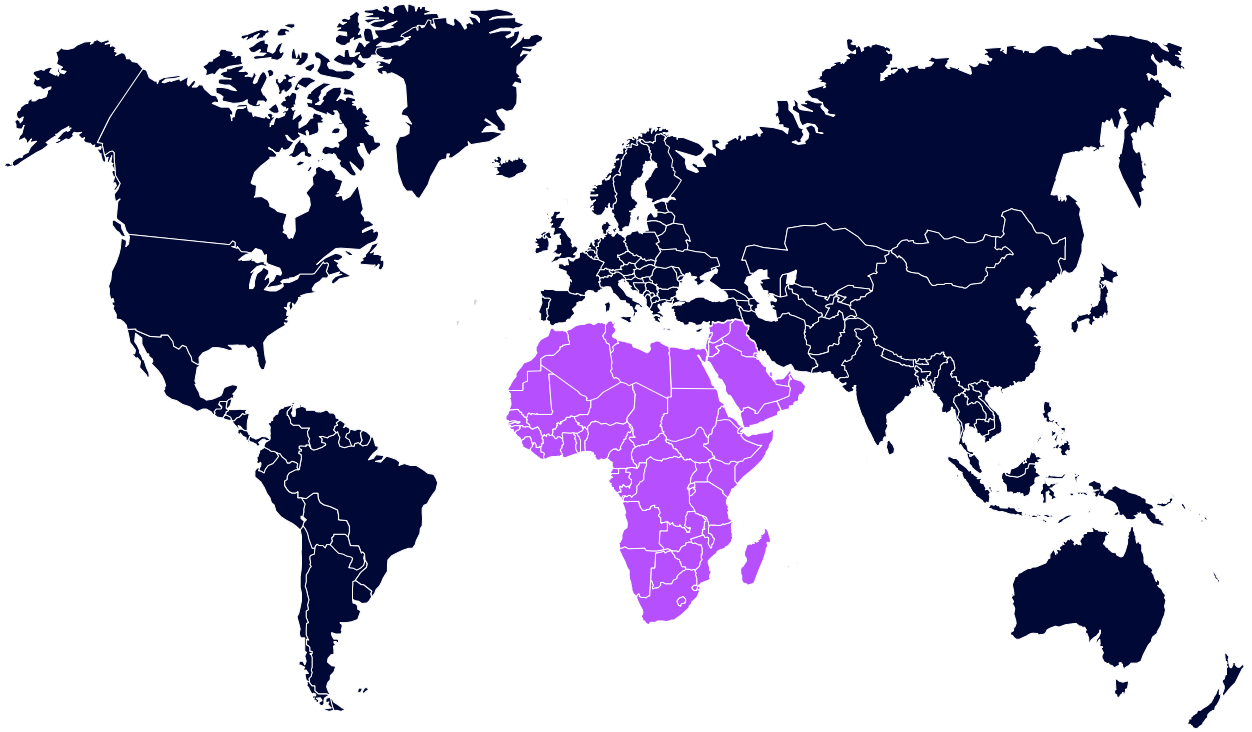
Worldwide International
Air connectivity

2026:

+1% YoY

Jan – Jun 2027 | Current outlook

+6% YoY



	The Americas	Europe	Africa | Middle East	Asia Pacific
2026:	=0% YoY	+3% YoY	+6% | -10% YoY	+2% YoY
Jan – Jun 2027 | Current outlook:	+4% YoY	+3% YoY	+11% | +22% YoY	+5% YoY

amadeus **Source: Amadeus Air Supply**

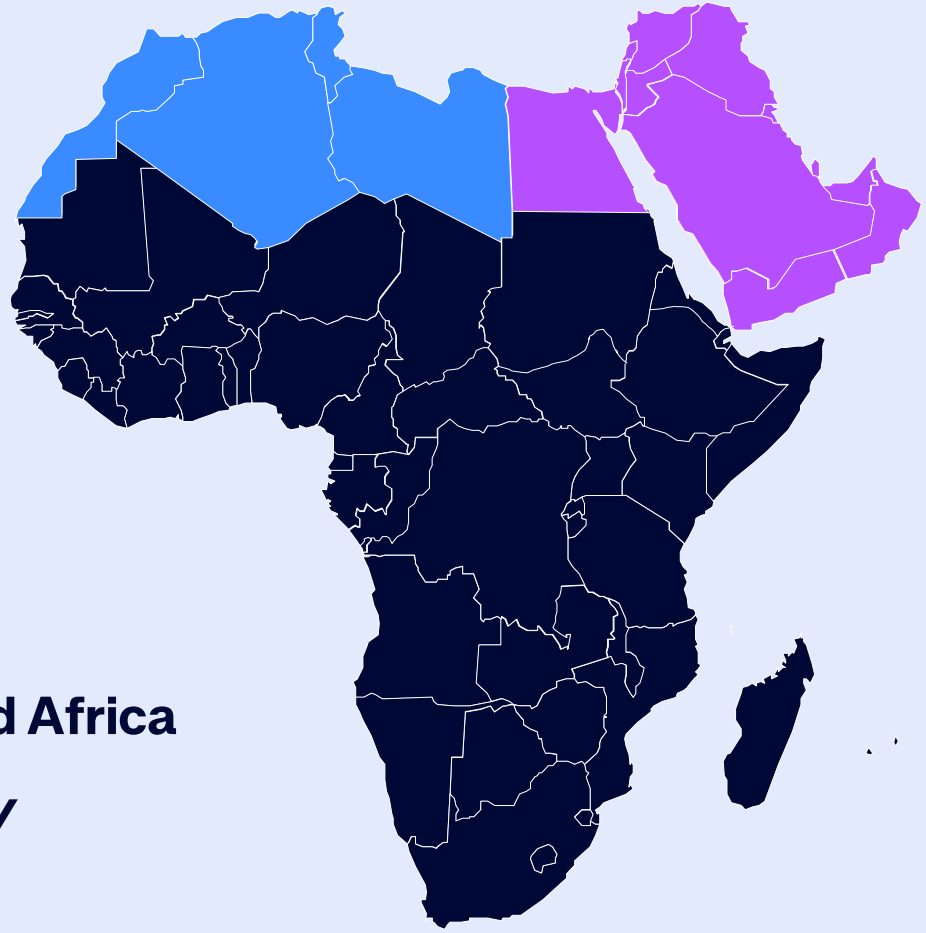
Forecast figures are estimates based on airline capacity models and scheduling assumptions and are therefore subject to future revisions and adjustments.

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H1 2027

The Middle East rebuilds capacity as Africa builds new routes

Available seats in H1 2027



Middle East and Africa

+19% YoY

Middle East

H1 2027 vs H1 2026

+22% YoY

H1 2027 vs H1 2025

+2% YoY

North Africa

H1 2027 vs H1 2026

+10% YoY

H1 2027 vs H1 2025

+17% YoY

Sub Saharan Africa

H1 2027 vs H1 2026

+11% YoY

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Forecast figures are estimates based on airline capacity models and scheduling assumptions and are therefore subject to future revisions and adjustments.

Source: Amadeus Air Supply



Middle East

A reset that opens new opportunities

02

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UAE and Saudi Arabia hold 60% of the region's seats

Air Supply for departing international flights from the Middle East between Jan and Jun 2027, as of 11 Oct 2026

Top performing origin countries*	H1 2027 current outlook (YoY variation)	Share
Kuwait	+57%	3.3%
Bahrain	+52%	2.2%
Lebanon	+44%	1.5%
UAE	**+28%**	**30.1%**
Oman	+19%	3.5%
Jordan	+19%	2.4%
Qatar	+17%	10.8%
Egypt	+13%	13.0%
Saudi Arabia	**+9%**	**29.9%**

***Considering origin countries that represent more than 1.5% share**

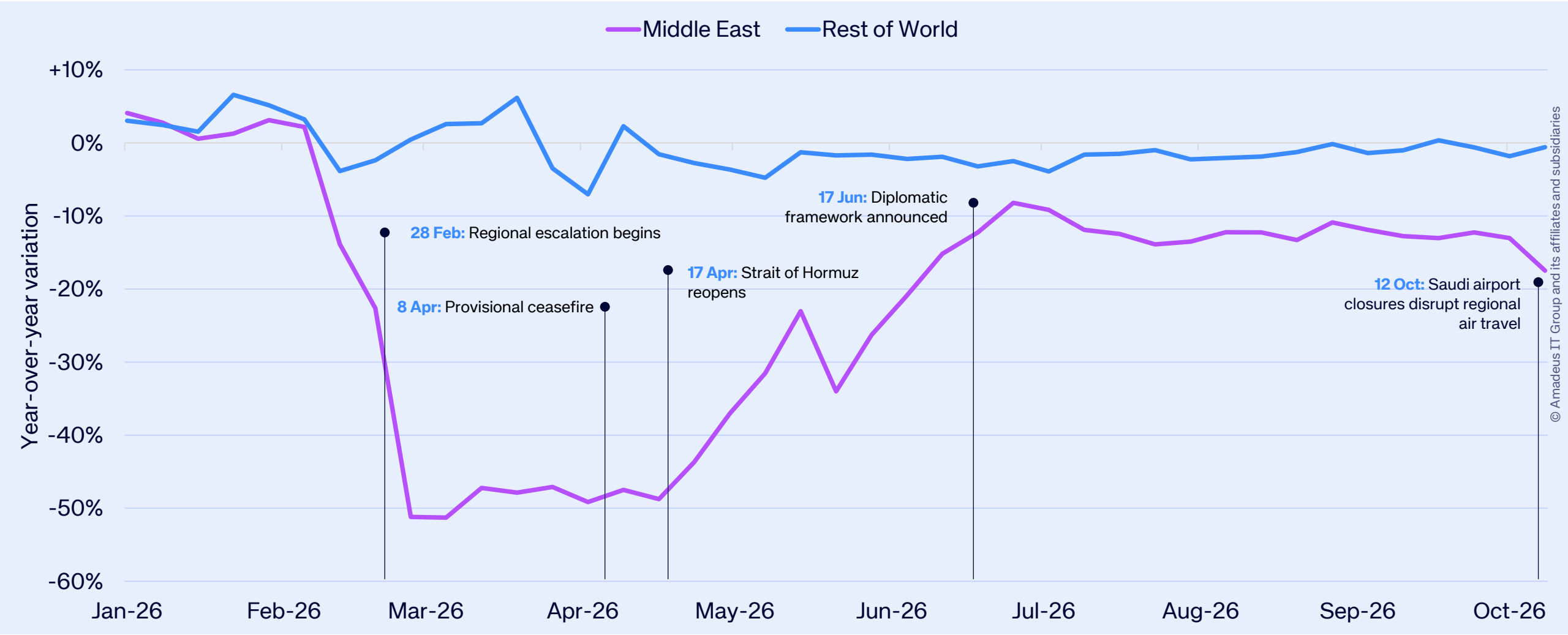
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Source: Amadeus Air Supply

Forecast figures are estimates based on airline capacity models and scheduling assumptions and are therefore subject to future revisions and adjustments.

Air travel demand shows resilience amid regional disruption

International departing air travelers between Jan and Oct 2026; vs previous year



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Source: Amadeus Air Travelers

Dubai still leads, but growth is moving to secondary airports

International departures in 2026, as of 30 Sep 2026

2026
H1 2027

DEPARTURES

#	AIRPORT		SHARE OF 2026 INTERNATIONAL DEPARTURES	2026 (YoY variation)	H1 2027 (YoY variation)
01	DXB	Dubai Airport	21.6%	-21%	+23%
02	DOH	Hamad International Airport	14.5%	-6%	+16%
03	JED	King Abdulaziz International Airport	9.8%	-5%	+5%
04	AUH	Abu Dhabi International Airport	8.7%	-7%	+36%
05	CAI	Cairo International Airport	8.0%	+1%	+11%
06	RUH	King Khalid International Airport	5.4%	-3%	+26%
07	SHJ	Sharjah International Airport	4.5%	-6%	+49%
08	MCT	Muscat International Airport	3.2%	-6%	+20%
09	KWI	Kuwait International Airport	3.0%	-31%	+53%
10	HRG	Hurghada International Airport	2.8%	+15%	+6%
MIDDLE EAST TOTAL			**100%**	-10%	+22%

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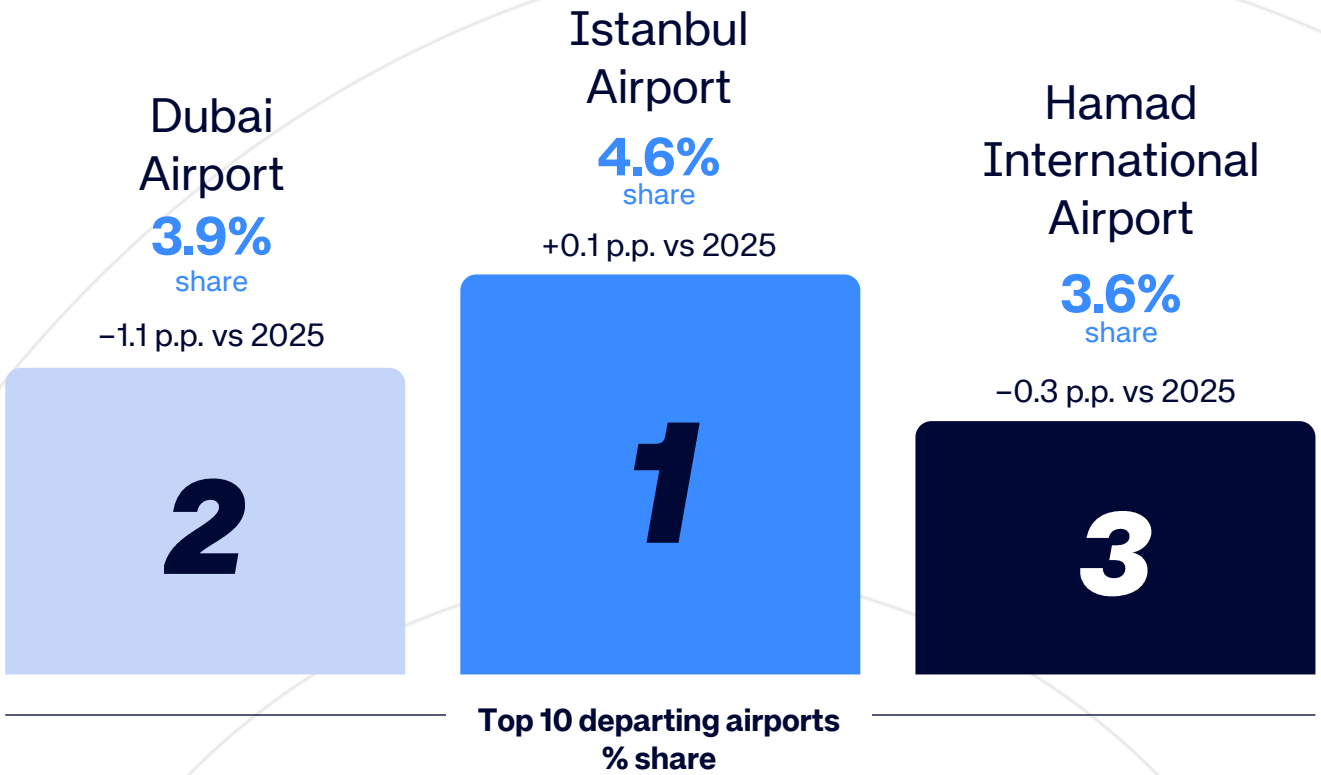
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Source: Amadeus Departures and Transfers

Forecast figures are estimates based on airline capacity models and scheduling assumptions and are therefore subject to future revisions and adjustments.

Istanbul overtakes Dubai as the world's #1 transfer hub

Top transfer hubs for international departures between 1 Jan and 15 October 2026



Rest of the Top 10 departing airports			% share 2026	P.P. (percentage point) difference
04	AMS	Amsterdam Airport Schiphol	3.1%	=0.0%
05	FRA	Frankfurt Airport	3.1%	-0.1%
06	SIN	Changi International Airport	3.1%	=0.0%
07	HKG	Hong Kong International Airport	2.7%	+0.4%
08	CDG	Charles de Gaulle Airport	2.5%	=0.0%
09	LHR	London Heathrow Airport	2.1%	=0.0%
10	MAD	Adolfo Suarez Madrid-Barajas Airport	2.1%	+0.1%

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Source: Amadeus Departure and Transfers

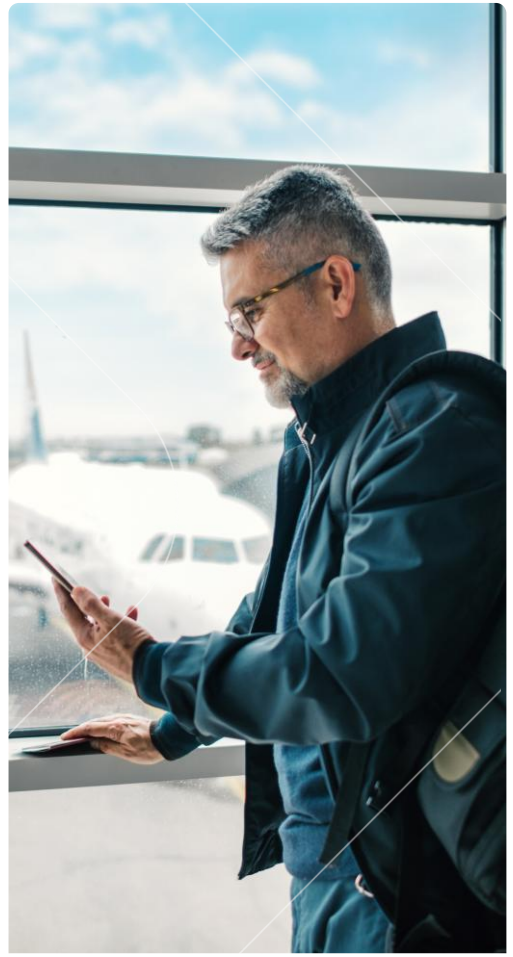
Gulf nationals show strong resilience

International departures from the Middle East, as of 30 Sept 2026

2026
H1 2027

DEPARTURES

#	Top nationalities	% SHARE	2026 (YoY variation)	H1 2027 (YoY variation)
01	**Saudi Arabia**	***15.5%***	-3%	**+15%**
02	**United Arab Emirates**	***13.2%***	-10%	**+35%**
03	**Egypt**	***7.7%***	-4%	**+15%**
04	India	5.0%	-16%	**+23%**
05	United Kingdom	4.2%	-13%	**+19%**
06	Kuwait	3.5%	-33%	**+52%**
07	Qatar	3.5%	-7%	**+27%**
08	Germany	2.8%	-9%	**+15%**
09	U.S.A.	2.7%	-10%	**+20%**
10	Oman	2.5%	-4%	**+24%**
TOTAL INTERNATIONAL		**100%**	-10%	**+22%**



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Forecast figures are estimates based on airline capacity models and scheduling assumptions and are therefore subject to future revisions and adjustments.

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Source: Amadeus Departures and Transfers

*Nationality is inferred based on passenger country of origin or residence, using observed travel patterns. This is a modeled indicator and does not represent declared citizenship



Africa

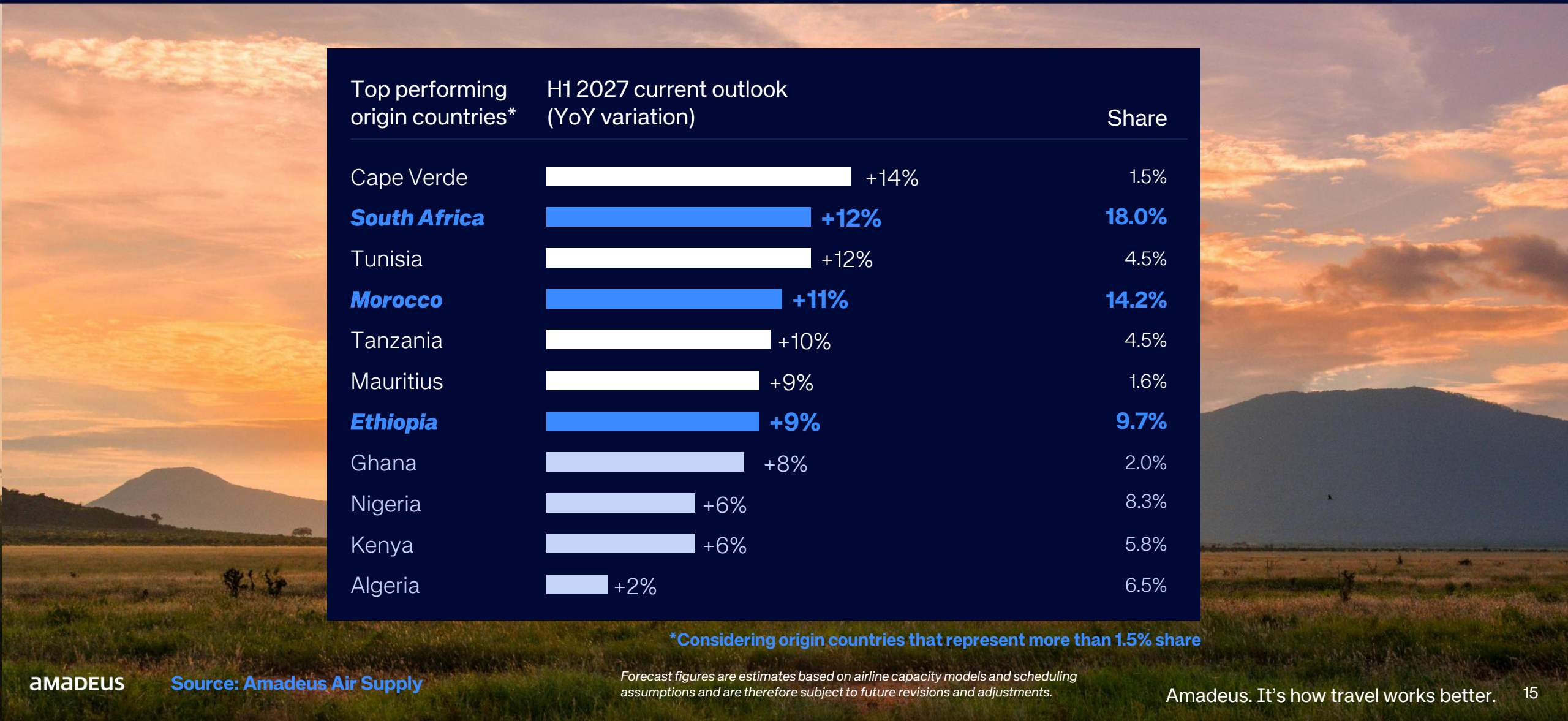
Africa: the fastest-rising travel region to watch

03

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Africa's Growth Engines for airline capacity

Air Supply for departing international flights from Africa between Jan and Jun 2027, as of 11 Oct 2026



Top performing origin countries*	H1 2027 current outlook (YoY variation)	Share
Cape Verde	+14%	1.5%
South Africa	**+12%**	**18.0%**
Tunisia	+12%	4.5%
Morocco	**+11%**	**14.2%**
Tanzania	+10%	4.5%
Mauritius	+9%	1.6%
Ethiopia	**+9%**	**9.7%**
Ghana	+8%	2.0%
Nigeria	+6%	8.3%
Kenya	+6%	5.8%
Algeria	+2%	6.5%

***Considering origin countries that represent more than 1.5% share**

Forecast figures are estimates based on airline capacity models and scheduling assumptions and are therefore subject to future revisions and adjustments.

Source: Amadeus Air Supply

African airports are growing fast

International departures in 2026, as of 30 Sep 2026

2026
H1 2027

DEPARTURES

#	AIRPORT		SHARE OF 2026 INTERNATIONAL DEPARTURES	2026 (YoY variation)	H1 2027 (YoY variation)
01	ADD	Addis Ababa Bole International Airport	11.0%	+6%	+8%
02	CMN	Mohamed V International Airport	7.6%	+16%	+20%
03	RAK	Menara Airport	6.3%	+8%	+4%
04	JNB	O.R. Tambo International Airport	5.2%	+3%	+8%
05	TUN	Tunis-Carthage International Airport	4.7%	+5%	+13%
06	ALG	Houari Boumediene Airport	4.7%	+6%	+5%
07	NBO	Jomo Kenyatta International Airport	4.4%	+1%	+15%
08	MRU	Sir Seewoosagur Ramgoolam Intl. Airport	2.3%	+8%	+9%
09	LOS	Murtala Muhammed International Airport	2.3%	+14%	+18%
10	CPT	Cape Town International Airport	2.0%	+7%	+10%
AFRICA TOTAL			**100%**	+6%	+12%

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Source: Amadeus Departures and Transfers

Forecast figures are estimates based on airline capacity models and scheduling assumptions and are therefore subject to future revisions and adjustments.

Top nationalities: European visitors and a rising African traveler

2026
H1 2027

International departures from Africa, as of 30 Sept 2026

DEPARTURES

#	Top nationalities	% SHARE	2026 (YoY variation)	H1 2027 (YoY variation)
01	**France**	**11.5%**	+3%	**+6%**
02	**Morocco**	**6.2%**	+9%	**+15%**
03	**South Africa**	**5.1%**	+4%	**+12%**
04	**United Kingdom**	**5.0%**	+4%	**+7%**
05	**Algeria**	**4.5%**	+11%	**+4%**
06	Nigeria	3.2%	+15%	**+21%**
07	Kenya	2.8%	+3%	**+20%**
08	Germany	2.8%	+11%	**+16%**
09	Italy	2.8%	+10%	**+14%**
10	Tunisia	2.7%	+3%	**+13%**
TOTAL INTERNATIONAL		**100%**	+6%	**+12%**



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Forecast figures are estimates based on airline capacity models and scheduling assumptions and are therefore subject to future revisions and adjustments.

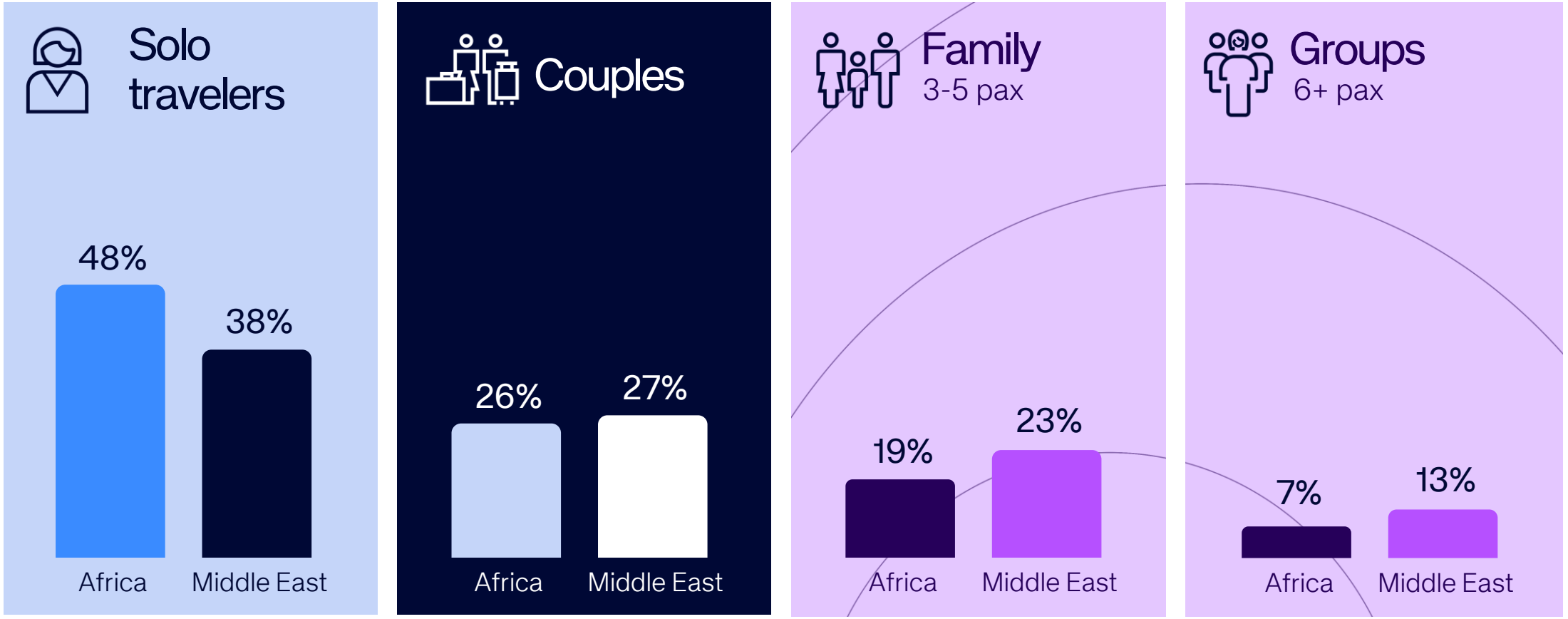
Source: Amadeus Departures and Transfers

*Nationality is inferred based on passenger country of origin or residence, using observed travel patterns. This is a modeled indicator and does not represent declared citizenship

Solo travelers in Africa, Families & Groups in the Middle East

2026
H1 2027

International departures between Oct 2026 and Mar 2027, with bookings as of 15 Oct



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Source: Amadeus Air Travelers

Forecast figures are estimates based on airline capacity models and scheduling assumptions and are therefore subject to future revisions and adjustments.



Africa Spotlights

04

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Addis Ababa

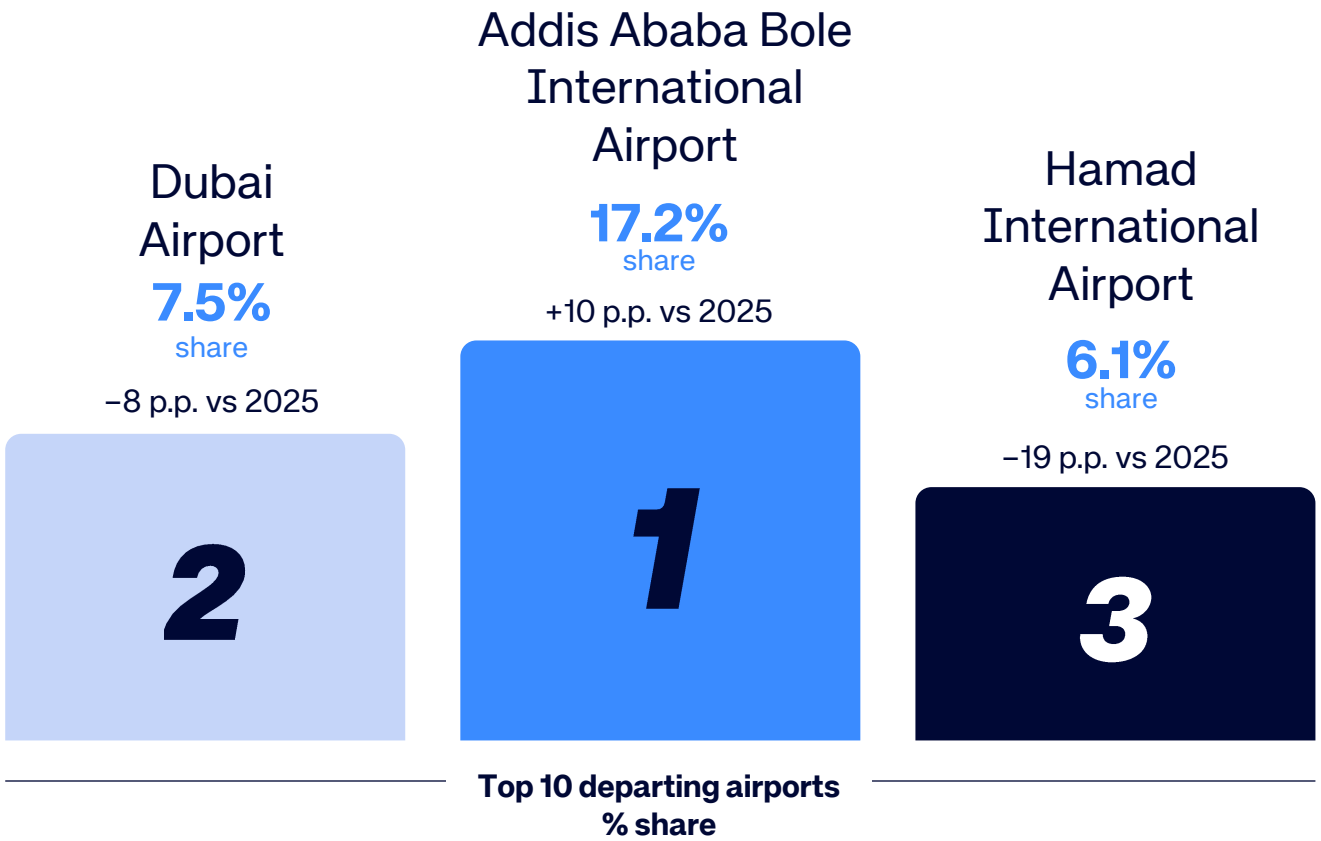
Africa’s gateway



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Addis Ababa Handles 2× Dubai's Transfer Traffic into Sub-Saharan Africa

International transferring traffic through airports, with destinations in Sub-Saharan Africa, between January and September 2026; vs previous year



Rest of the Top 10 departing airports			% share 2026	P.P. (percentage point) difference
04	IST	Istanbul Airport	5.1%	+3%
05	CDG	Charles de Gaulle Airport	4.1%	-1.%
06	CMN	Mohamed V International Airport	3.7%	+20%
07	JNB	O.R. Tambo International Airport	3.4%	-1.%
08	NBO	Jomo Kenyatta International Airport	3.0%	-14%
09	LFW	Lome Airport	2.3%	+6
10	FRA	Frankfurt Airport	2.0%	+9%

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Source: Amadeus Departures and Transfers

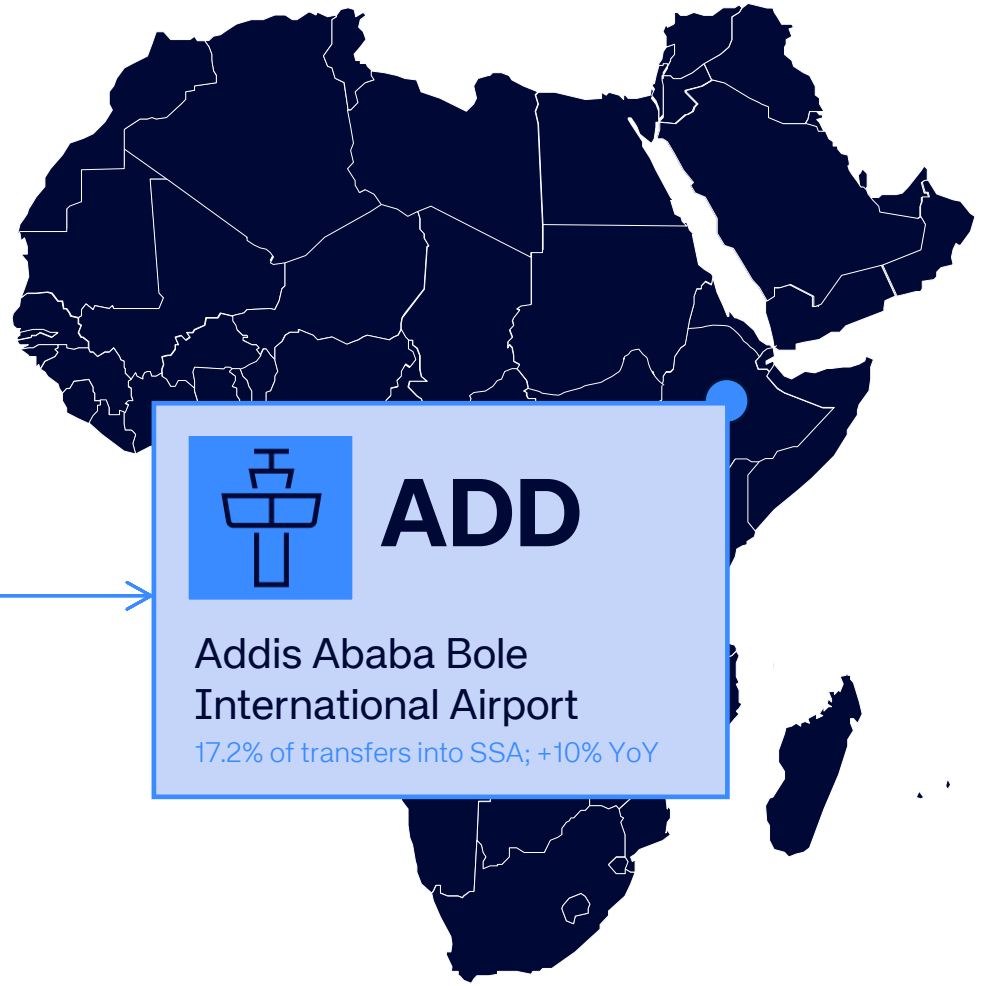
No single nationality dominates the Addis Ababa traveler mix

International transferring traffic through airports, with destinations in Sub-Saharan Africa, between January and September 2026; vs previous year

DEPARTURES

Top nationalities transferring through Addis Ababa

#	Top nationalities	% SHARE	2026 (YoY variation)
01	**Nigeria**	**6.2%**	+7%
02	**India**	**6.2%**	+15%
03	**China**	**4.5%**	+4%
04	**D.R. of the Congo**	**4.1%**	+10%
05	**South Africa**	**4.1%**	+5%
06	United Kingdom	3.5%	+4%
07	Italy	3.4%	+16%
08	U.S.A.	3.1%	+8%
09	Uganda	3.0%	+32%
10	France	2.9%	+7%



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Source: Amadeus Departures and Transfers

Addis Ababa feeds destinations across the whole Sub-Saharan Africa

International transferring traffic through airports, with destinations in Sub-Saharan Africa, between January and September 2026; vs previous year



Top destinations **after a transfer** through Addis Ababa

01. **Tanzania**	+12% YoY	10.7% share
02. **South Africa**	+9% YoY	9.0% share
03. **Nigeria**	+9% YoY	8.8% share
04. **D.R. the Congo**	+12% YoY	6.0% share
05. **Zimbabwe**	+15% YoY	5.2% share
06. **Uganda**	+24% YoY	5.0% share
07. **Kenya**	=0% YoY	4.9% share
08. **Madagascar**	+18% YoY	3.7% share

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Source: Amadeus Departures and Transfers

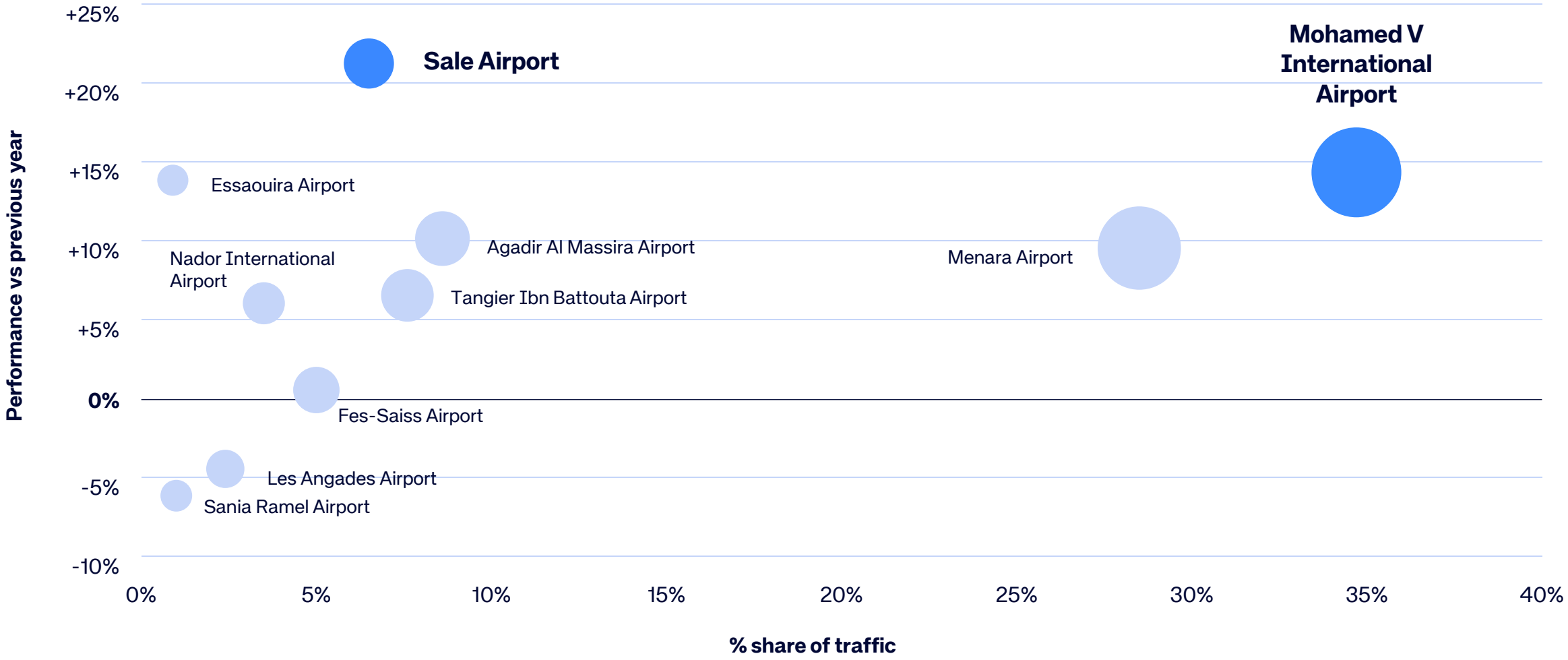
Morocco airports



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Rabat airport amongst top performers, whilst Casablanca records largest volumes

International traffic departing from Moroccan airports between Jan and Sep 2026 vs previous year



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Source: Amadeus Departures and Transfers

Rabat→ 4 strategic insights



A new terminal



Low-cost airlines are reshaping the passenger mix



Business

25.7%

share · +2.6 p.p. vs previous year

Business Leisure



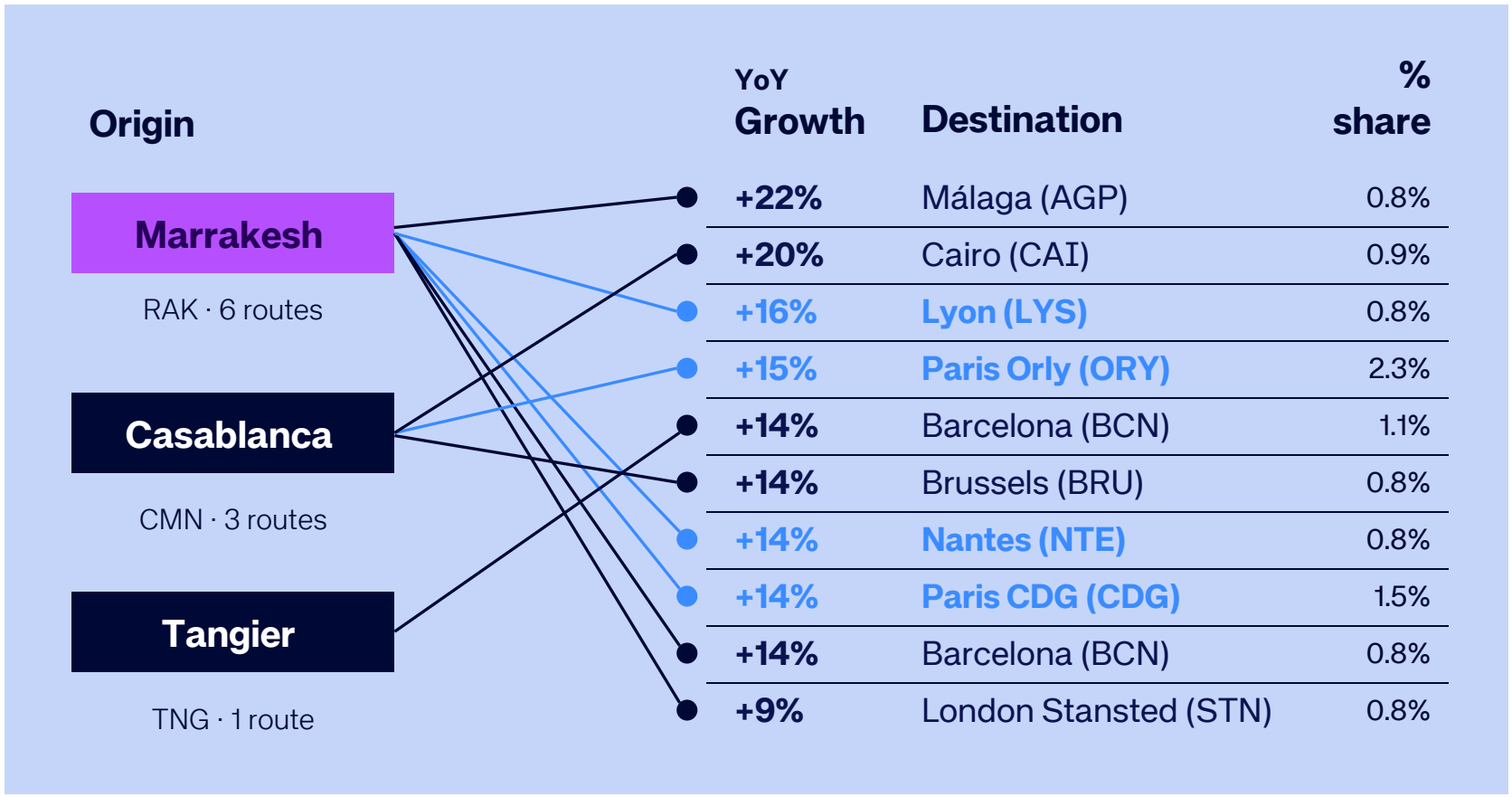
Rabat as the model for Morocco's football's biggest event airports

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amadeus **Source: Amadeus Air Travelers**

Forecast figures are estimates based on airline capacity models and scheduling assumptions and are therefore subject to future revisions and adjustments.

Europe fuels Morocco's fastest-growing routes



YoY Growth	Destination	% share
+22%	Málaga (AGP)	0.8%
+20%	Cairo (CAI)	0.9%
+16%	Lyon (LYS)	0.8%
+15%	Paris Orly (ORY)	2.3%
+14%	Barcelona (BCN)	1.1%
+14%	Brussels (BRU)	0.8%
+14%	Nantes (NTE)	0.8%
+14%	Paris CDG (CDG)	1.5%
+14%	Barcelona (BCN)	0.8%
+9%	London Stansted (STN)	0.8%

6/10
fastest-growing routes start in Marrakesh, Morocco's leading leisure gateway

4/10
connect to France, a key growth market

9/10
link to Europe, across a mix of source markets

**considering routes that represent more than 0.75%*

International air supply between 1 Jan and 11 October 2026; vs previous year

amadeus **Source: Amadeus Air Supply**

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Looking ahead

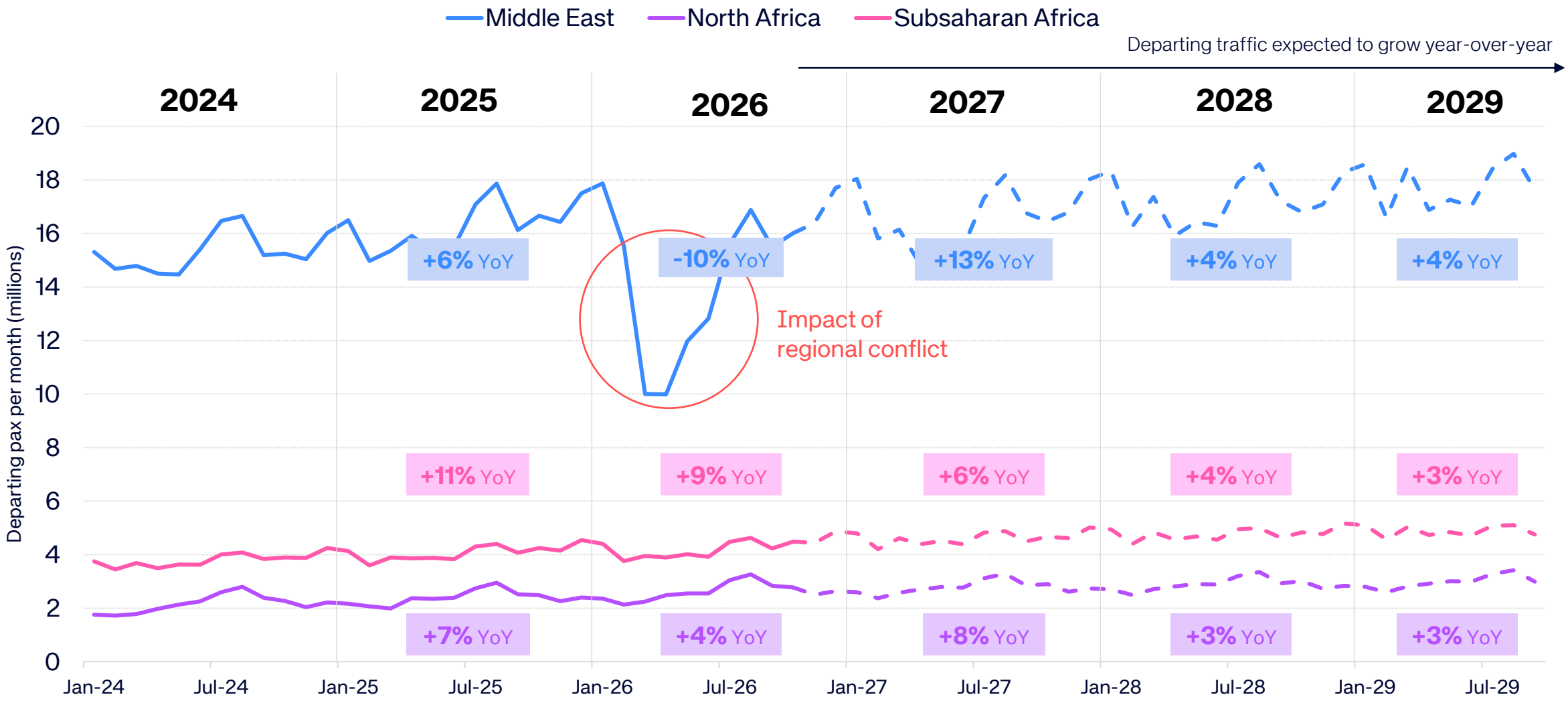
What could reshape the next wave of travel demand?

05

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Forecasted growth from MEA regions despite regional uncertainty

Departing international traffic from the Middle East and Africa between 2025 and October 2029



*Jan-Oct 2029 vs 2028

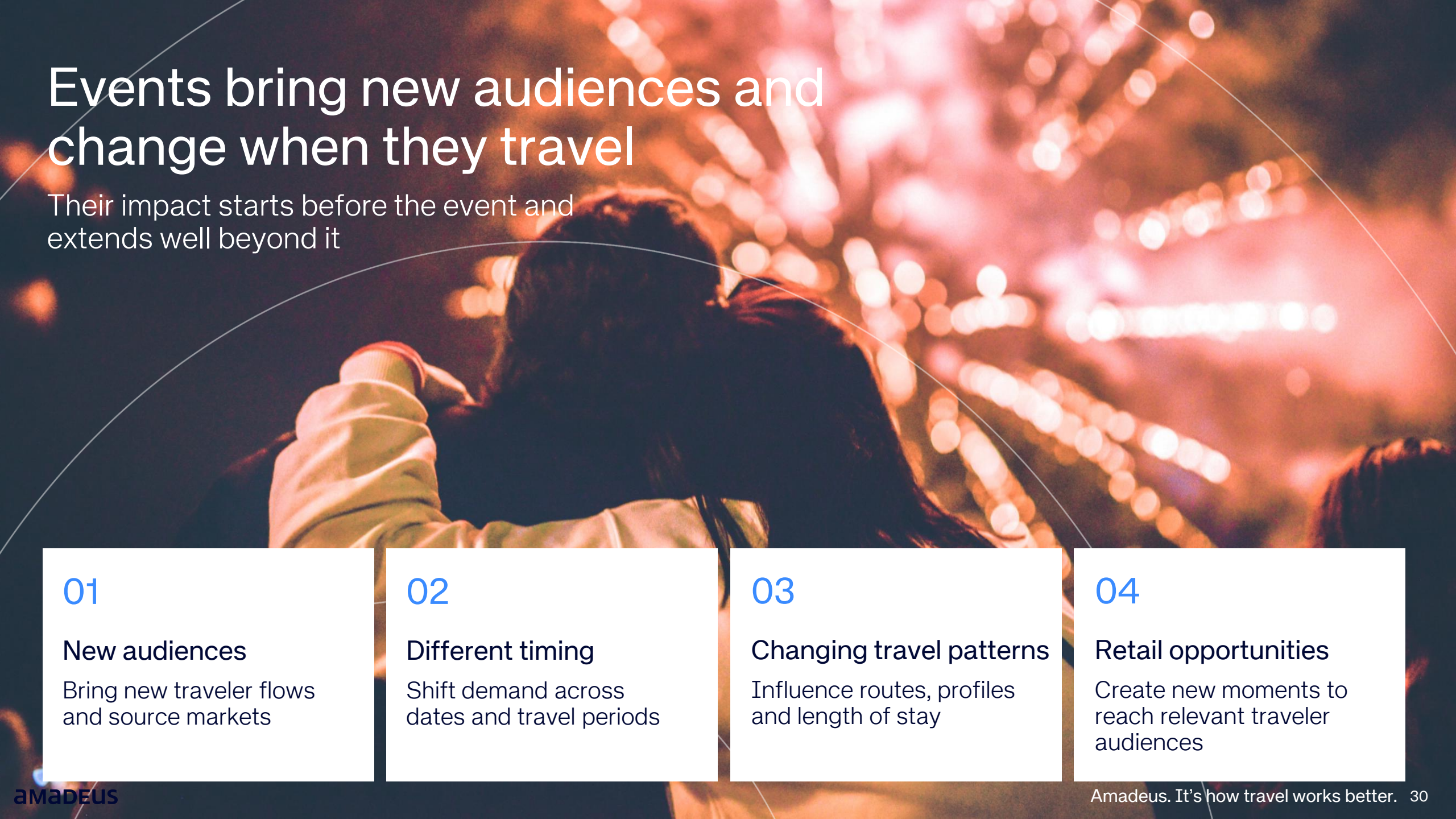
Source: Amadeus 36-month forecast

Forecast figures are estimates based on airline capacity models and scheduling assumptions and are therefore subject to future revisions and adjustments.

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Events bring new audiences and change when they travel

Their impact starts before the event and extends well beyond it



01

New audiences

Bring new traveler flows and source markets

02

Different timing

Shift demand across dates and travel periods

03

Changing travel patterns

Influence routes, profiles and length of stay

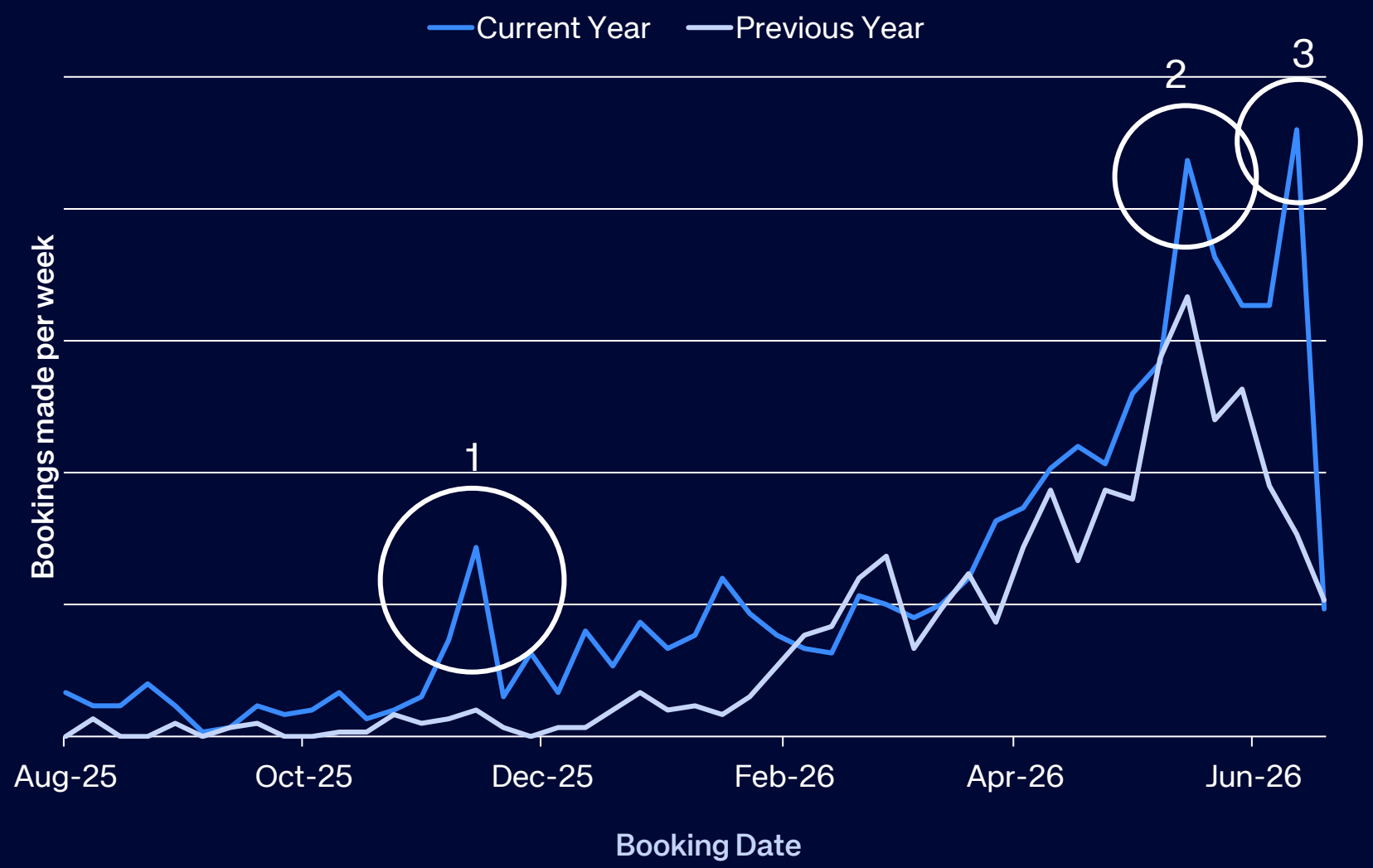
04

Retail opportunities

Create new moments to reach relevant traveler audiences

Football's biggest event demand builds in waves, not on one date

Tourist bookings from the United Kingdom for arrivals during the World Cup to Mexico City; vs previous year



UK bookings for Football's biggest event in 2026 travel to Mexico City

1
Nov 2025: First FIFA ticket purchase window coincide with UK booking spike

2
Jun 2026: England progress from group stage

3
July 2026: England beat DR Congo to setup Mexico last 16 tie

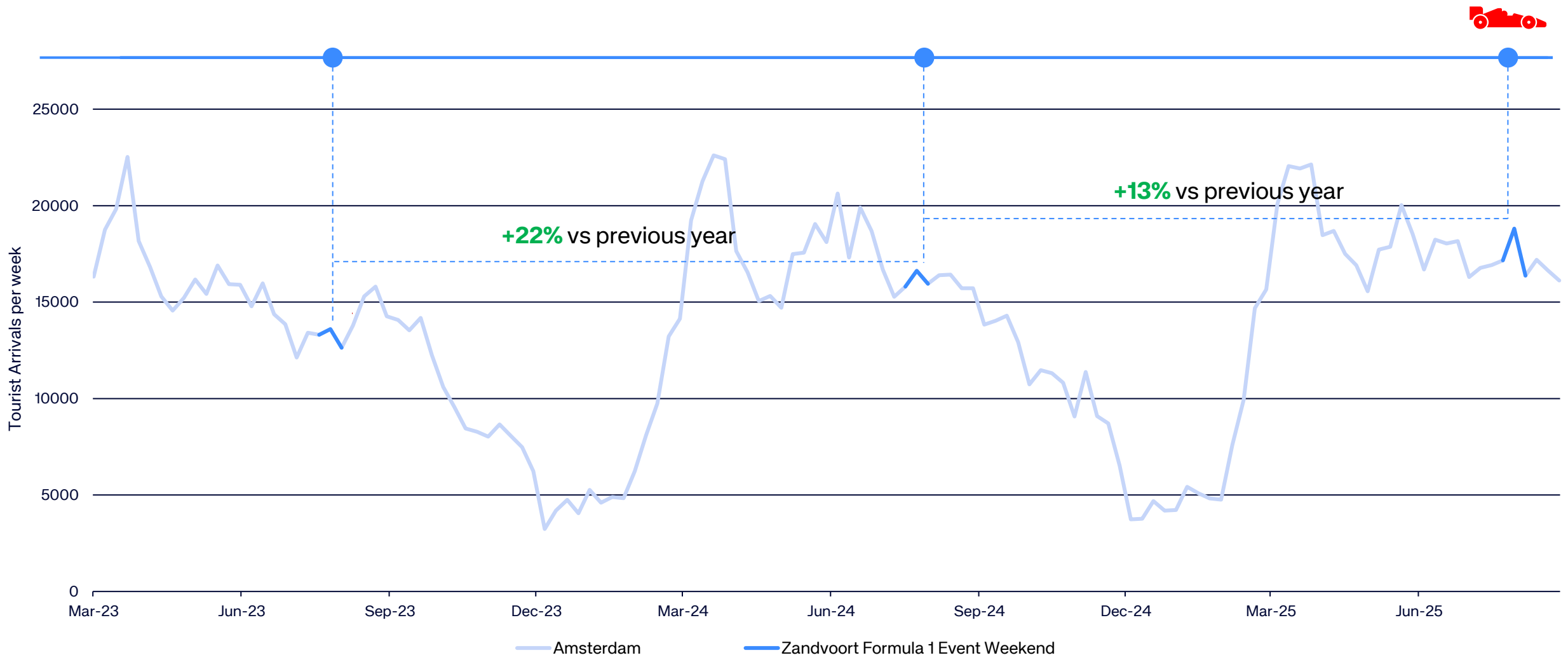
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Source: Amadeus Air Visitors

Formula 1 lifted US arrivals to Amsterdam by up to 22%

International tourist arrivals from the U.S.A. to Amsterdam between April 2022 and September 2025



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Source: Amadeus Arrivals and Stays

Events bring more visitors, longer stays and higher spending

Formula 1 can reshape both traveler flows and length of stay

It attracts international demand, extends length of stay, and generates greater economic value

01. Attracts

International travelers audiences

Up to **+88%** increase in arrivals from international markets

Singapore	Malaysia	Madrid
United States +88%	United Kingdom +49%	United Kingdom +46%
United Kingdom +73%	Australia +40%	South Korea +45%
New Zealand +54%	Singapore +38%	France +32%

02. Extends

Length of stay beyond the event



03. Generates

Additional destination value



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Takeaways

1 Middle East: a reset that opens new opportunities

2 Africa: the region to watch for travel growth

3 Across MEA: know the traveler, and act early



See the signals.
Understand the traveler.
Activate the opportunity.

Thank you!

Marina Giuliano

VP Brands, Retailers and Media - Amadeus

Email
marina.giuliano@amadeus.com

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Amadeus Travel Intelligence For Travel Retail



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