

TRAVEL DISTRIBUTION AND RETAILING UPDATES

Weeks 19 & 20, 2025

This edition contains news on:

- Aeroméxico
- Air France-KLM
- Avelo Airlines
- Copa Airlines
- Finnair
- Hawaiian Airlines
- Qantas
- Riyadh Air
- Amadeus
- Sabre

Finnair launches first Nevio ‘native order’

Finnair, a long-time advocate for modern airline retailing, has become the first airline to create a native order on Nevio. The order was created on May 5 by Finnair's CEO, Turkka Kuusisto, booking on Finnair's own website.

Nevio is Amadeus's platform for Modern Airline Retailing, through concepts like Offer and Order. Finnair was Nevio's first customer, and continues on this path with being the first one to create a Nevio Order.

Amadeus’ Nevio clients and their status

	Finnair	Saudia	British Airways	Air France-KLM
Announced in	12/2022	10/2023	04/2024	02/2025
First order created	05/2025	N/A	N/A	N/A

Direct/NDC reach 85% of Copa Airlines sales

Copa Airlines recently revealed that the indirect channel (traditional GDS sales) now only accounts for 15% of its total sales, halving the figure from Q1 2023. 85% of its sales are now made via direct or NDC channels.

The carrier has been charging an EDIFACT surcharge since 2022 (currently 24 USD per direction) and does not distribute NDC via the GDS.

Copa Airlines shift in direct and indirect channel shares



Hawaiian Airlines to move to Alaska's PSS

Hawaiian Airlines will transition to Alaska Airlines' Sabre PSS by Q2 2026, moving from the Amadeus Altéa system that it has used since 2023.

Since Alaska acquired Hawaiian in September 2024, both carriers have been aligning their distribution and IT processes, including moving to operate on a single PSS. As of May, Hawaiian restored full content to all indirect channels and removed its EDIFACT GDS surcharge.

Hawaiian Airlines distribution timeline



Air France-KLM NDC goes live on Sabre

NDC content from Air France-KLM (AF-KL) is now available to Sabre-connected agents worldwide. AF-KL's NDC content has already been live on Amadeus and Travelport for a few years.

GDS EDIFACT bookings for AF-KL carry a 24 EUR surcharge per segment for leisure customers. Until July 2025, the surcharge for business customer is levied at a reduced rate of 3 EUR.

AF-KL's GDS NDC implementation timeline

	NDC deal announcement	NDC go-live on GDS	Implementation period
Amadeus	09/2020	Q3 2021	~12 months
Travelport	12/2021	01/2023	13 months
Sabre	10/2023	05/2025	18 months

Riyadh Air signs Sabre as first GDS partner

Riyadh Air has signed its **first distribution agreement with Sabre**, marking its first GDS partnership. The deal includes both EDIFACT and NDC content. In October 2024, the airline announced it would adopt Sabre's IQ Suite for Offer and Order.

Additionally, Riyadh Air has **partnered with TPConnects** to distribute and service its NDC content via the Iris aggregator platform.

The airline has recently confirmed several NDC integrations, including Verteil Technology as its NDC aggregator launch partner, ahead of beginning flight operations later this year.

Aeroméxico expands Sabre IT partnership

Mexico's flag carrier, Aeroméxico, has expanded its IT relationship with Sabre by committing to two SabreMosaic modules. The carrier will integrate the Air Price IQ and Ancillary IQ solutions to enable dynamic pricing and offer personalized ancillaries.

Qantas NDC Bookings surge on TPConnects

Travel aggregator TPConnects has reported a 'tenfold increase' in Qantas NDC bookings via its agency platform, Iris, over the past six months. Around 30% of the aggregator's global bookings are made in Australia and New Zealand, with Qantas accounting for a 'significant portion of that volume'.

1A and 1S report Q1 2025 financial results

The two GDSs reported mixed results, with Sabre seeing a 3% year-over-year decline in air bookings, while Amadeus reported a 2.5% increase. Sabre attributed its drop to “broad softness globally”. Both GDSs expect growth in the coming quarters of 2025, driven by market trends and increasing NDC adoption.

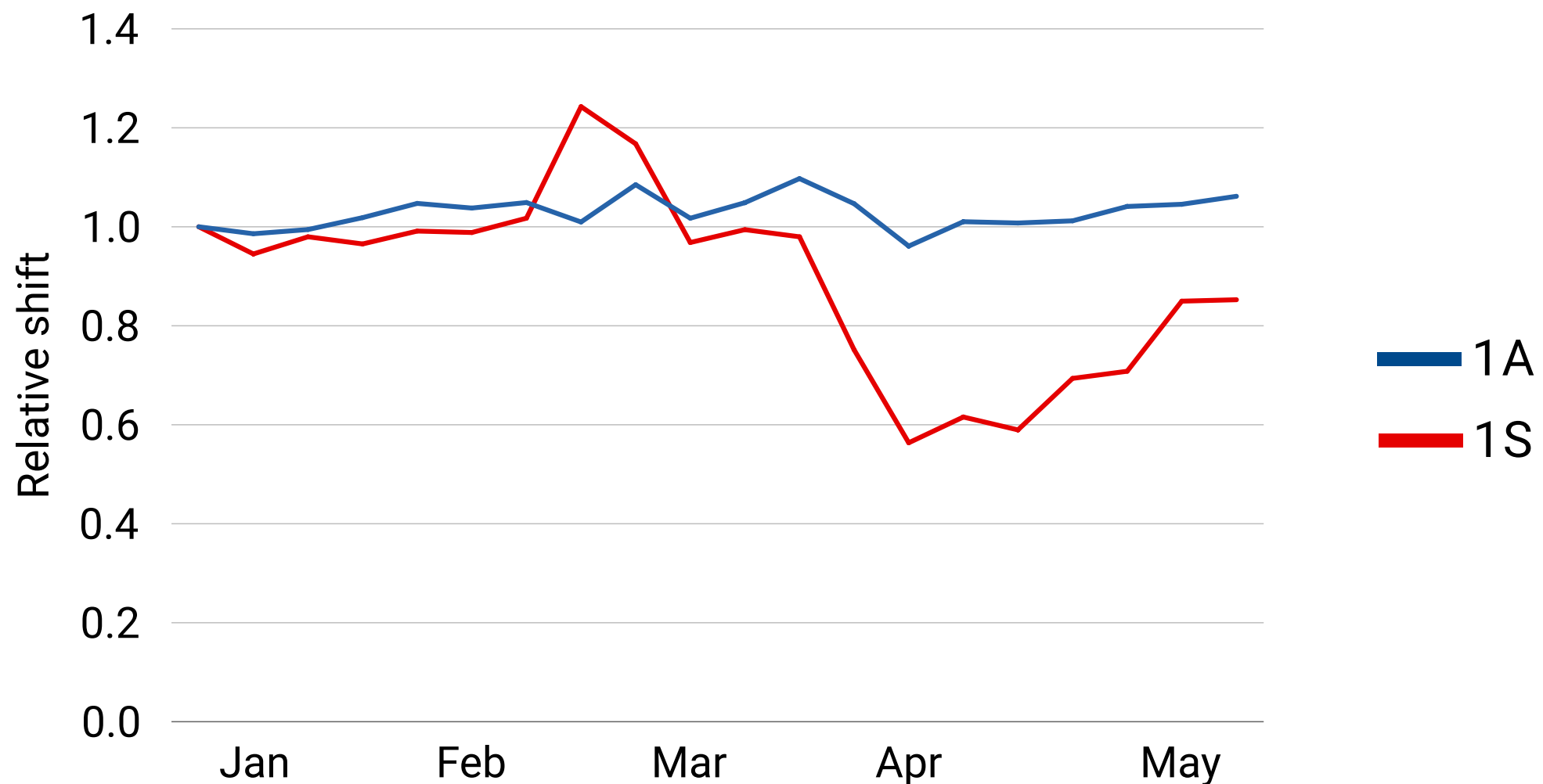
Year-on-year change - Q1'25 vs Q1'24*

<i>Change vs. Q1'24</i>	Sabre	Amadeus
Distribution revenue	-1% (569 million USD)	+8% (821 million EUR)
Air distribution bookings	-3% (82 million)	+2.5% (128 million)

**Calculation used for reporting metrics are not identical between the GDSs*

Excerpt: 1A and 1S 2025 share prices

Relative changes in share price (compared to 01 Jan, 2025)



The graph shows how the Sabre and Amadeus share prices have changed relative to their value on 1 January 2025. After dropping sharply between February and April, Sabre has begun to recover (**net change to date: -15%**).

Amadeus is now **up 6%** with little overall movement.

Sabre looks to raise 975 million USD via Senior Secured Notes

Sabre plans to **raise 975 million USD** through a **private offering** of senior secured notes via its subsidiary, Sabre GBL. The proceeds will primarily go toward **refinancing existing debt**, including **early repayment of a 2028 term loan**. The notes will be offered exclusively to **qualified institutional buyers**. With a **debt burden of 5.12 billion USD***, the move is part of Sabre's broader strategy to strengthen its balance sheet.

The announcement follows Sabre's recent sale of its Hospitality Solutions business to TPG for 1.1 billion USD (960 million USD net) and the sale of its corporate self-booking tool to Serko for 12 million USD in late 2024.

**Source: InvestingPro*

LCCs expand GDS relationships

Avelo Airlines: The American ULCC has renewed a multi-year agreement for Sabre's low-cost carrier PSS, Radixx. The airline has also become the first LCC to adopt Ancillary IQ, a SabreMosaic module, to offer personalised ancillaries

Skytrans: The Australian carrier has signed a distribution agreement with Sabre. Skytrans' fares and ancillaries are now available to agents through the Sabre marketplace

Flyadeal: Saudi Arabian low-cost carrier Flyadeal is considering using GDSs for distribution. The seven-year-old airline began with website-only sales but later expanded to agency sales through direct connects

NDC milestones for travel tech providers

Google: Is going “all in on NDC” to boost adoption, in collaboration with SAP Concur and Amex GBT. If an NDC and EDIFACT fare match in price, the booking will be made via NDC. The companies are starting this approach with United and American Airlines

Hahnair: Has launched Distriply, a new brand for its NDC-based solutions. Distriply is designed to simplify access to NDC content for airlines and travel agencies

Amtrav: The corporate travel platform reported that 61% of its total bookings in April were made via NDC or direct API connections. It does not offer GDS NDC bookings

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