



TRAVEL DISTRIBUTION AND RETAILING UPDATES



WEEKS 31 & 32, 2025

THIS EDITION CONTAINS NEWS ON:

Airlink | Lufthansa Group | Ryanair | Southwest Airlines | TAP Air
Portugal | Turkish Airlines | Vietnam Airlines | Amadeus | Amex GBT
& CWT | ARC | Navan | Sabre | US DOJ | Verteil Technologies

AMADEUS AND SABRE REPORT Q2 2025 FINANCIAL RESULTS

Both GDSs saw a decline in distribution revenue vs. Q1 2025, driven largely by a decrease in anticipated air bookings, especially due to geographical fluctuations. In Q1, 1A and 1S expected growth in the coming quarters of 2025, due to market trends and increasing NDC adoption; however, this expectation was not met in Q2.

Amadeus noted an overall YoY increase in its distribution revenue (6%) and revenue per booking (7%). Sabre has lowered its YoY air distribution bookings growth rate to 3.5% from its previous double digit target, in the best case scenario, and announced a six-month delay in the launch of its LCC solution. Sabre's share price dropped 40% after the Q2 2025 results were announced.

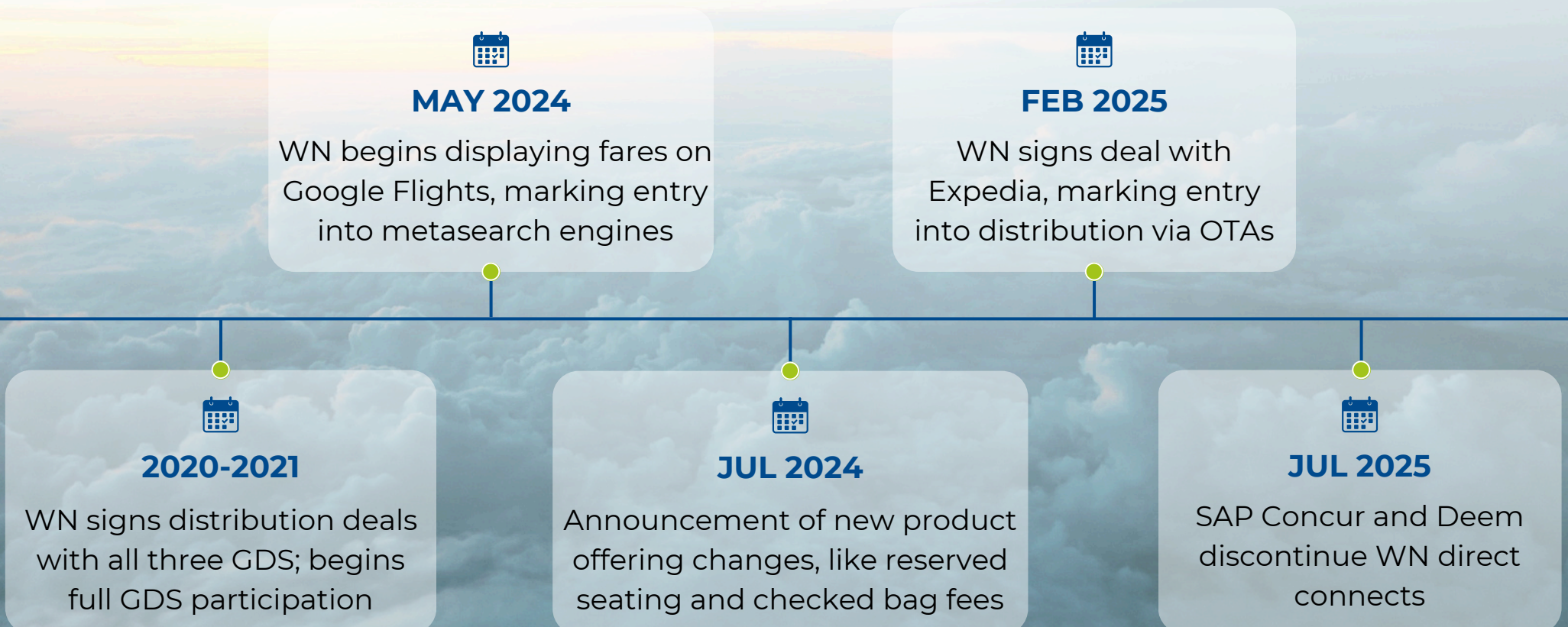
	Sabre	Amadeus
Distribution revenue	546 million USD	787 million EUR
Change vs. Q2' 2024 (YoY)	-1%	+6%
Change vs. Q1' 2025 (QoQ)	-4%	-4%

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

SOUTHWEST AIRLINES UPDATE ON DISTRIBUTION ACTIVITIES

1) Southwest Airlines (WN) expects to earn 350 million USD from checked bag fees in 2025, with no major customer pushback noted. Replacing its Wanna Get Away (incl. 2 free checked bags) fare with a Basic (no frills) fare caused a brief dip in bookings, now stabilised.

2) WN's content is now bookable on Priceline and other Booking Holdings brands (Booking.com, Agoda, etc.). Earlier this year, it signed its first OTA deal with Expedia Group. Previously direct-only, WN is gradually diversifying its retail network.



US DOJ DROPS LAWSUIT AGAINST AMEX GBT / CWT

Amex GBT's acquisition of CWT has faced regulatory obstacles since its announcement 18 months ago. While the UK CMA gave the deal the green light earlier this year after a 9 month investigation, the US DOJ trial was set to begin in September.

The US DOJ has 'voluntarily dismissed' their lawsuit that claimed the merger of the two companies would lead to reduced market competitiveness. The deal, originally expected to close in H2 2024, is now expected to close in Q3 2025, according to Amex GBT.



JAN 2025

US DOJ files lawsuit against the acquisition, with a trial date for September 2025



APR 2025

Push to advance the US DOJ trial date as CWT's financial position worsens



MAR 2024

Amex GBT announces a \$570 million acquisition of CWT



MAR 2025

After a 9 month investigation, the UK CMA clears the deal to go through



JUL 2025

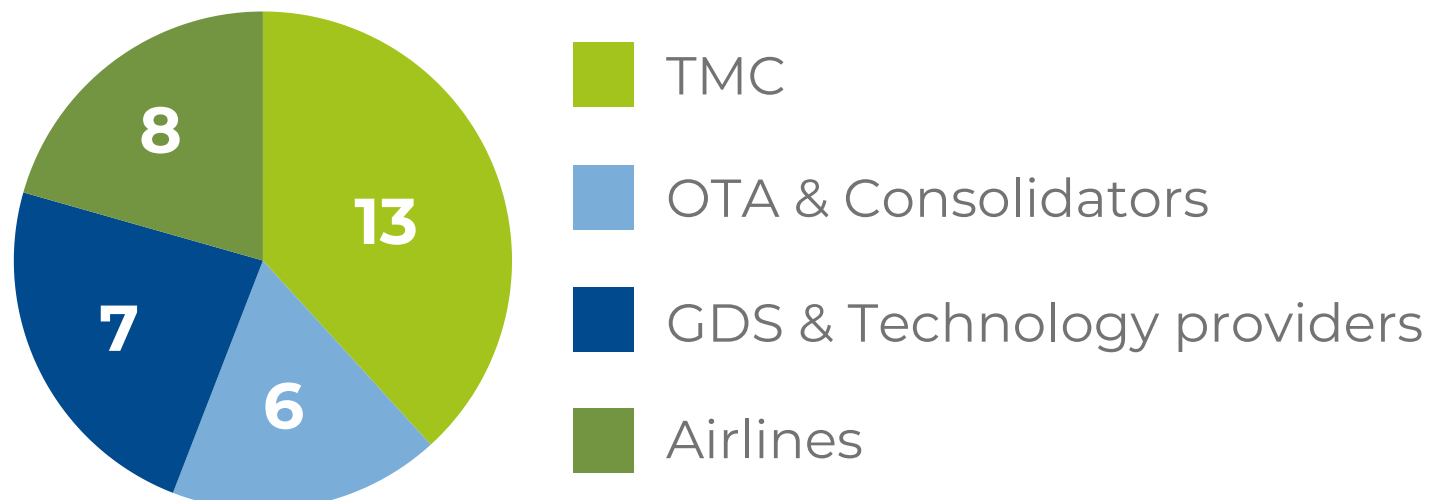
US DOJ voluntarily dismisses lawsuit against AMEX GBT/ CWT

ARC ADDS TWO MORE CATEGORIES TO NDC BEST PRACTICES

ARC's NDC Advancement Working Group has expanded its NDC best practices to include branded fares and loyalty. Branded fares focus on unified naming of fares and bundles across all channels, while loyalty provides guidelines on when loyalty benefits should be communicated during the purchase process.

ARC created the working group in late 2023 to make headway in NDC and define recommended industry best practices. In December 2024, the initial set of 20 best practices was released. The practices cover many NDC topics, including change management and improving processing efficiency, to standardise NDC practices.

The group comprises of a mix of various industry stakeholders



VERTEIL PARTNERS WITH TWO MORE AIRLINES FOR NDC

Airlink and TAP Air Portugal have integrated their NDC content with Indian travel aggregator and distribution platform provider, Verteil Technologies.

Airlink: The South African carrier launched its NDC offering in July 2024 and imposes a GDS EDIFACT surcharge differentiated by PoS.

TAP Air Portugal: Has a comprehensive NDC program consisting of aggregator connections (Travelfusion, AirGateway, etc.), Direct Connects, and GDS NDC. NDC is live on Sabre, with Travelport expected to go live soon. TAP is an Amadeus Altéa NDC customer.

Verteil's recent airline NDC partnerships

Turkish
Airlines

Oct 2024

*NDC launch
aggregator*

AirJapan

Dec 2024

Riyadh Air

May 2025

*NDC launch
aggregator*

Centrum
Air

May 2025

TAP Air
Portugal

Jul 2025

Airlink

Jul 2025



RYANAIR LAUNCHES PLATFORM FOR OFFLINE TRAVEL AGENTS

Ryanair has launched its new 'Travel Agent Direct' platform for offline agents, supporting its authorised-partner-only strategy.

Ryanair has long opposed data scraping by third parties. In 2024, the airline updated its approach by partnering with 'approved OTAs', offering direct connect access. In return, these OTAs have agreed not to mark up Ryanair's prices. The carrier has since also partnered with several aggregators and tech providers.

RIPPLING AND DUFFEL COME TOGETHER FOR BOOKING TOOL

Business software platform Rippling has integrated with travel technology provider Duffel to create a corporate booking tool. The tool is part of Rippling's corporate expense management products.

Rippling's move exhibits a growing trend of merging expense management with travel capabilities. Ramp (2022), Brex (2023), and Expensify (2024) are some other examples.

NAVAN DISCONNECTS GDS NDC ACCESS, GOES DIRECT ONLY

Navan has discontinued sourcing NDC content via GDSs since June, citing quality concerns. The TMC is now focusing on direct connections and is launching its own NDC aggregation platform to reduce dependence on third-party providers for NDC content.

NDC makes up approximately 30% of Navan's air bookings, and the company is adopting and pushing connected airlines to integrate NDC standard 24.1 for uniformed and consistent delivery.

TRAVELPORT GROWS NDC DISTRIBUTION CONNECTIVITY

Travelport has expanded its NDC access via an integration of its NDC API with four travel-technology companies. Additionally, Travelport became the first GDS to be granted the 'highest certification in NDC as an aggregator' (level 4 NDC) from IATA.

CEE Travel Systems

Czech Republic

NPF (and its customer, Abreu)

Portugal

Travel Technology & Solutions (TTS)

Portugal

Vibe

United Kingdom

MORE AIRLINE UPDATES

Effective 2 September, **Lufthansa Group** will expand the removal of its Light fares from GDS EDIFACT to German domestic tickets. LH Group will also be making specific RBDs (K/L/T/S) across all fare brands for SIN-DACHB markets exclusive to NDC on a trial basis from 1 September to 30 November.

Turkish Airlines has added **Inqbaytor Technologies** as its first Direct NDC API aggregator connection in Sri Lanka. Since launching its NDC API in October 2024, TK has been gradually expanding its aggregator partnerships.

Vietnam Airlines has launched a co-branded card with **ACB** and **Visa**, called Lotusmiles Pay. Available as both a credit and debit card, it allows users to earn miles while spending globally.

Globespan, a TMC, has integrated with the business travel management tool **Amadeus Cytric**. Through this partnership, Globespan became the first TMC to issue a live Air Canada NDC booking via Cytric.



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- Structured, flexible and customizable, modular approach to distribution strategy solutioning
- Audits that offer airlines solutions to specific problems in GDS and NDC distribution
- Offer-Order transformation approach

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