

TRAVEL DISTRIBUTION AND RETAILING UPDATES

Weeks 17 & 18, 2025

This edition contains news on:

- Aegean Airlines
- Delta Air Lines
- Finnair
- Frontier Airlines
- Hawaiian Airlines
- Iberia
- LOT Polish Airlines
- Riyadh Air
- Royal Jordanian
- Viva

Hawaiian Airlines distribution strategy update

In alignment with Alaska Air Group's distribution strategy, Hawaiian Airlines has reinstated Neighbour Island fares in indirect channels, making its full content once again available via the GDS.

Additionally the airline has removed its 7 USD (POS USA: North America to Hawaii routes) and 4.8 USD (Neighbour Island) per segment EDIFACT surcharge (DCRS).

Hawaiian Airlines distribution timeline



Frontier Airlines expands NDC distribution

In 2024, Frontier began shifting its distribution strategy, including a planned ramp-up of NDC. The airline has now announced several key developments:

- New expanded distribution agreement signed with Amadeus to include access to NDC, marking the first time Frontier's NDC will be available via a GDS
- NDC partnership with OTA Hopper; content is now live on Hopper's booking platform
- NDC integration with Fareportal, enabling NDC bookings via Fareportal's OTAs, CheapOair and OneTravel

Frontier exited the Sabre GDS as of October 1, 2024. No new agreement has been announced. EDIFACT content remains available via Amadeus and Travelport.

Delta and Finnair sign Amex GBT NDC deals

1 **Delta Air Lines** has signed an expanded distribution agreement with Amex GBT, which includes access to NDC content, once available. Delta is currently in the development and testing phase of its NDC offering.

The renewed partnership also provides Amex GBT access to content from Delta's joint venture partners: Aeroméxico, LATAM Airlines, Korean Air, Virgin Atlantic, and Air France-KLM.

2 **Finnair** has entered a new partnership focused on expanding 'new digital content'. The agreement includes access to Finnair's NDC content.

The airline has recently slowed its plan to fully exit EDIFACT due to the pace of NDC adoption.

Royal Jordanian joins ARC Direct Connect

The integration will allow the carrier to establish NDC in the US market.

ARC Direct Connect allows airlines to provide NDC in the US market using ARC's settlement services. Recent ARC Direct Connect airline integrations include All Nippon Airways, Kenya Airways, TAP Air Portugal, Turkish Airlines, and Vietnam Airlines.

ARC Direct Connect statistics for March 2025*



890

agencies



37

participating
airlines



20.3%

of total ARC
transactions

**Source: ARC (website)*

Iberia NDC goes live on Sabre

The integration gives Sabre users access to Iberia’s NDC content. Iberia NDC is now live via all three major GDS. Iberia’s fellow IAG carrier, British Airways, went live with NDC on Sabre in March 2025.

	Amadeus	Travelport	Sabre
NDC go-live on GDS	10/2022	01/2024	04/2025

Viva signs NDC deal with Amadeus

Viva, a Mexican ultra-low-cost carrier, has expanded its distribution agreement with Amadeus, including access to NDC content. A go-live date of Viva’s NDC content on Amadeus has not been announced.

Airlines expand on NDC and retailing efforts

LOT Polish Airlines: The carrier's NDC content is now available to agents using the APG platform, in over 140 countries. LOT's NDC bookings bypass a 16 EUR GDS EDIFACT surcharge (increased from 13 EUR in Feb 2025)

Riyadh Air: Announced Verteil Technologies as their NDC aggregator launch partner. The carrier aims to be the first fully OO-based airline from the first day of operations, its maiden flight launching later this year

Aegean Airlines: Signed a long-term IT deal with Amadeus, covering Digital Commerce, Anytime Merchandising, and the Outpayce (payment gateway)

Centrum Air: The carrier from Uzbekistan announced Verteil as its NDC technology partner to power and implement a full suite of NDC solutions

Sabre to sell Hospitality Solutions business

Sabre has entered a 'definitive agreement' to sell its Hospitality Solutions business unit to private equity firm TPG for **1.1 billion USD**. The sale does not include Sabre's hotel B2B distribution business. Sabre's Hospitality Central Reservations System (CRS) Transactions typically represent around 40% of the volume of its Direct Billable Bookings - Air.

The sale is in tandem with Sabre's broader effort to strengthen its financial position. The net proceeds (~960 million USD after taxes and fees) will primarily go towards debt reduction.

Expected sale closure



Q3 2025

pending regulatory approvals

In late 2024, Sabre sold its corporate self-booking tool, GetThere to Serko for 12 million USD.

Airline payments updates

Corendon Airlines: Selected Gr4vy's payment orchestration platform to move past a single PSP model and enable a multi-PSP strategy while reducing risk

Vietnam Airlines: Expanded its partnership with Adyen to add global acquiring capabilities in key markets. This builds on their 2017 collaboration integrating Ayden's payment gateway solution

Lufthansa Group: Launching 'Click to Pay' in October 2025 across airline websites, simplifying payments by allowing customers to book using just their email address, following a one-time card registration with Visa

Air Transat: Expanded its long-standing partnership with payments processing and solution provider Worldline

More travel payments industry updates

Datalex, an e-commerce solutions provider, has launched its new payments offering - DLX Pay. DLX Pay is a payment platform built for airlines transitioning to modern retail. **Air Transat** has been announced as the launch customer for this offering, with implementation going live later this year

Kani Payments, a financial reporting/ reconciliation/ compliance software provider, has partnered with **Swiipr**, a travel-focused payments platform

Affirm, a pay-later platform, has partnered with **UATP**. The integration allows merchants using UATP (including airlines and travel agencies) to utilize Affirm's pay-over-time plans

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