INTRODUCTION

Scope
Key findings

REGIONAL OVERVIEW

Potential for growth in the Middle East and Africa region
Travel modes sales recovering strongly from the 2020 collapse
Despite strong post-2020 growth, most countries still well below pre-pandemic sales levels
Ukrainian visitor numbers to Egypt hit by the Russian invasion in 2022
Airlines still the main travel mode in value sales terms
Full recovery from the pandemic is proving to be a gradual process

LEADING COMPANIES AND BRANDS

Fragmented competitive landscape at a regional level
Saudi Arabian Airlines a strong regional leader
Regional airlines generally generate their highest revenues in their home market
El Al recovers its third position in 2022 as Israeli air travel booms in this year

FORECAST PROJECTIONS

Pre-pandemic sales levels to be reached again in 2025
Online transaction value growth will continue outpacing the offline performance

COUNTRY SNAPSHOTS

Egypt: Market Context
Egypt: Competitive Landscape
Israel: Market Context
Israel: Competitive Landscape
Kenya: Market Context
Kenya: Competitive Landscape
Morocco: Market Context
Morocco: Competitive Landscape
Saudi Arabia: Market Context
Saudi Arabia: Competitive Landscape
South Africa: Market Context
South Africa: Competitive Landscape
United Arab Emirates: Market Context
United Arab Emirates: Competitive Landscape

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