# THE RISE OF THE SUPER CONNECTORS

WEDNESDAY 17 SEPTEMBER

WEBINAR

# SPEAKERS

CHIEF ANALYST

## John Grant

Chief Analyst, OAG

With a wealth of experience across the global aviation industry, John provides expert commentary on market developments for OAG, making connections between what the data is telling us and the trends and events occurring in the sector.

GUEST SPEAKER

## Andrew Ward

Director, Transport & Logistics, Middle East

Andrew Ward is a Middle East–based aviation consultant focused on hub strategy, infrastructure development, traffic forecasting, and PPP-backed delivery across the GCC and wider MENA region.

MODERATOR

## Deirdre Fulton

**Partner, MIDAS Aviation**

Deirdre is a partner in an aviation consultancy providing meaningful insight and analysis to clients around the world. She works closely with OAG on their data analysis and publications.

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# TODAY'S DISCUSSION

In this webinar we'll be discussing the influential rise of superconnectors in the Gulf region and Türkiye and their impact on worldwide connectivity, exploring the airports that have grown to become some of the world's most influential hubs - Dubai, Doha, and Istanbul.

We'll be discussing the following:

- The extent to which infrastructure enables growth
- How the development of national airlines has changed connectivity between Europe and Asia
- With increasing competition around the wider Gulf region, including a new airport and airline in Riyadh, what comes next for these airports and their competitors?

We'll be taking questions as we go.  Please use the chat function to ask your questions

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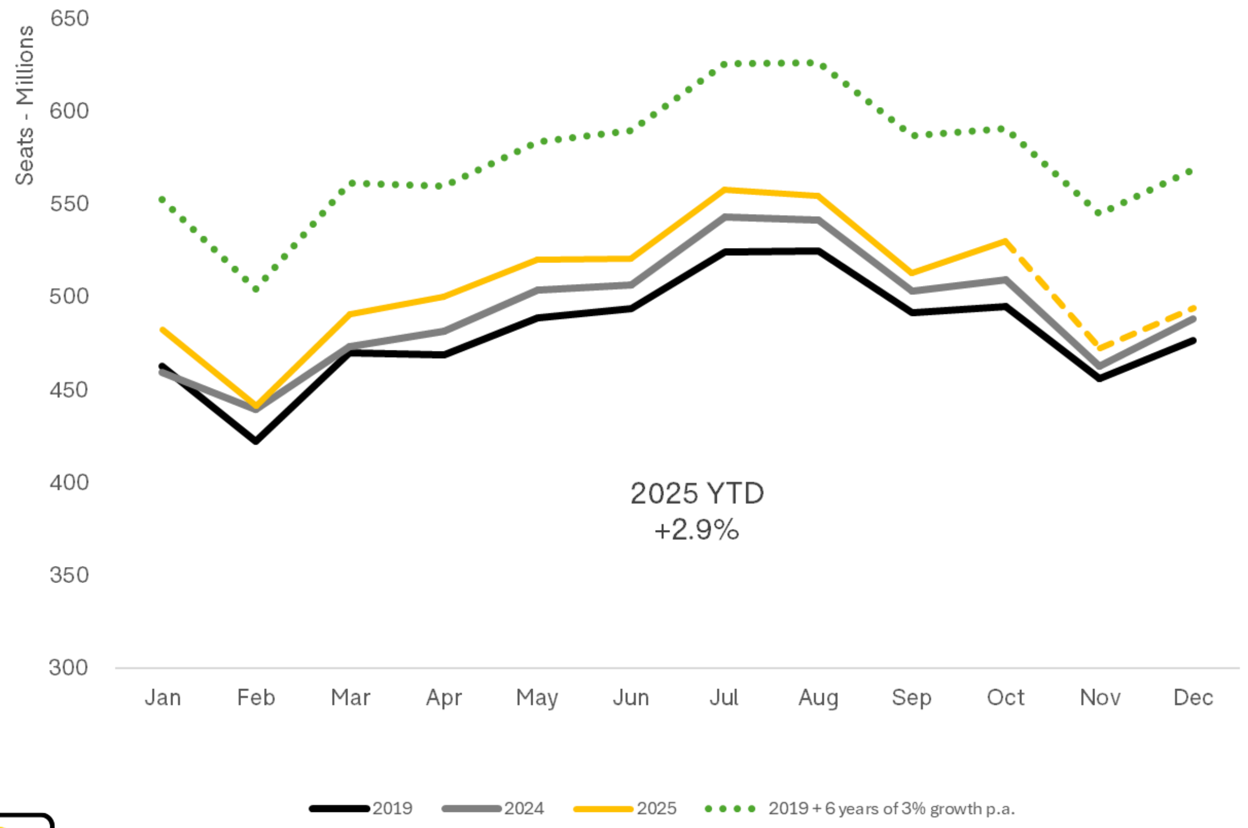
# Global capacity growth is slowing, down to 2.9% for the year to date, from 3.1% during the summer




- Capacity for the year to date is a little slower than we saw during the summer season, now 2.9% ahead of 2024, compared to 3.1% during the summer season.
- Domestic capacity growth for the year to date (Jan-Sep) remains strong in Latin America and the Middle East, but has slowed in Asia Pacific, North America and is declining in Europe.
- International capacity growth remains strong in all regions with the exception of North America. Strongest international growth is taking place in the Asia Pacific region – although the region still remains behind 2019.

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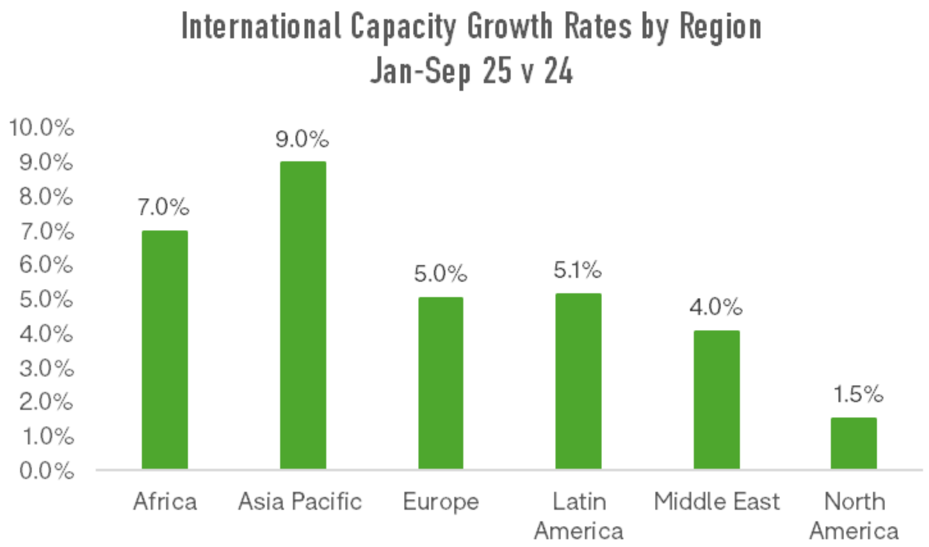
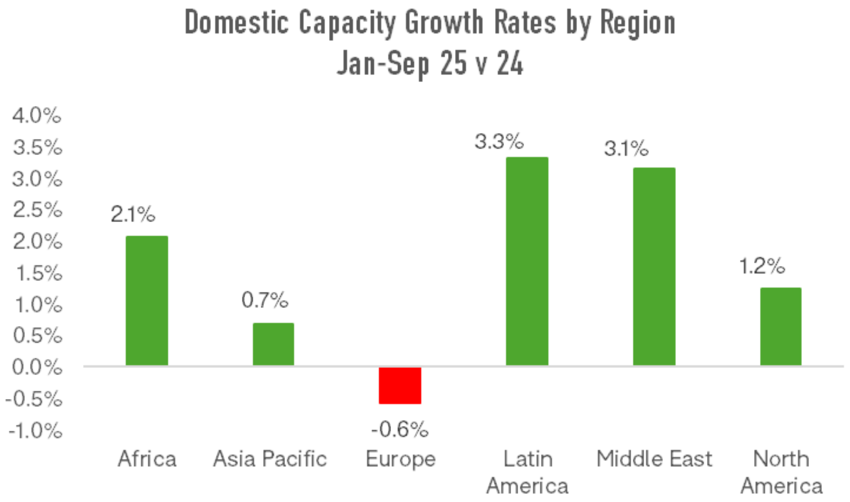
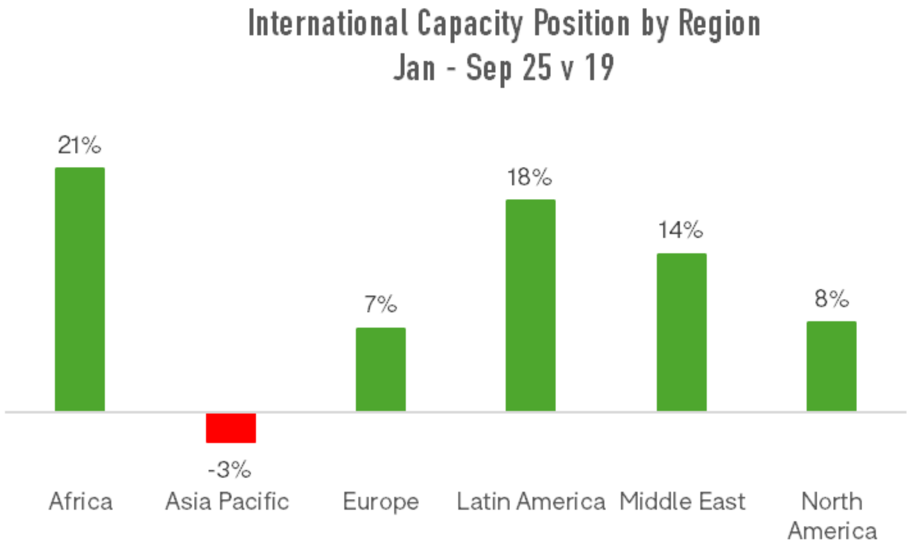
# Global divergence between domestic & international growth rates

- Asia Pacific leads in terms of year-on-year international capacity growth  - however, this market is still in places in recovery mode v's 2019, particularly North East Asia, where international capacity is still 31% below 2019

- Domestic growth remains slower, particularly in the mature aviation markets in North America and Europe – where capacity has fallen year on year

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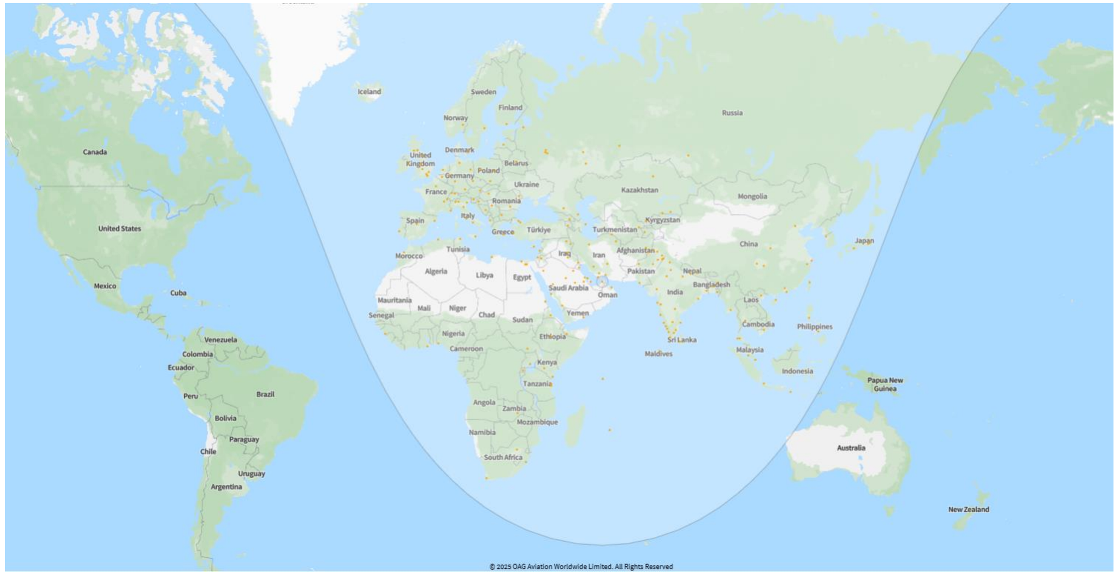
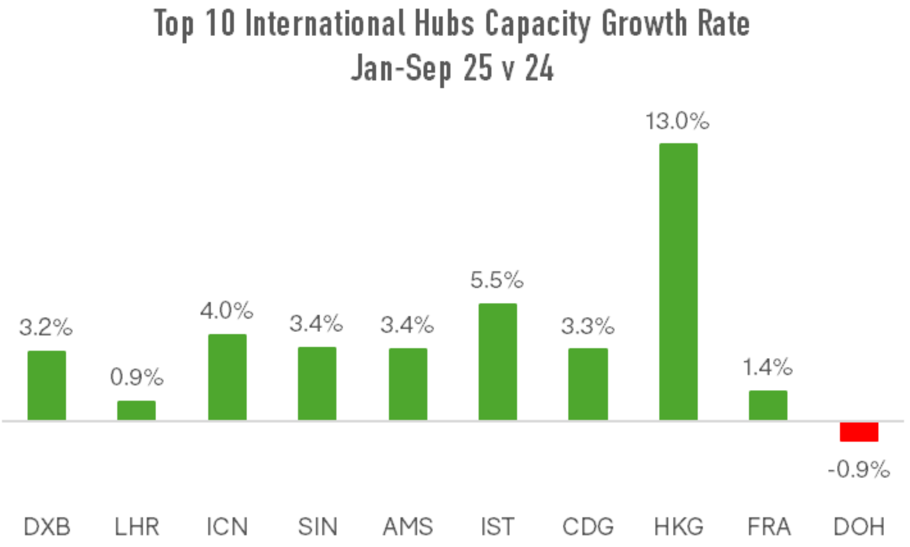
# Location, location, location

- Slower capacity growth evident in Europe’s biggest international hubs – LHR year on year capacity growth only 0.9%, FRA 1.4% and CDG 3.3%
- Other international hubs growing faster – notably IST which is up 5.5% and HKG +13%, driven by ongoing post Covid19 recovery and new runway capacity
- The Middle East and Turkiye have spent the last decade developing multi-runway, mega-terminal designs to handle 70M–100M+ passengers annually, allowing hubs in these areas to capture connecting flows
- Middle East hubs benefit from geographic advantage (7–8 hours from most global regions)

Flying range from DXB of 4,500 miles



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# Superconnectors: how do they compare?

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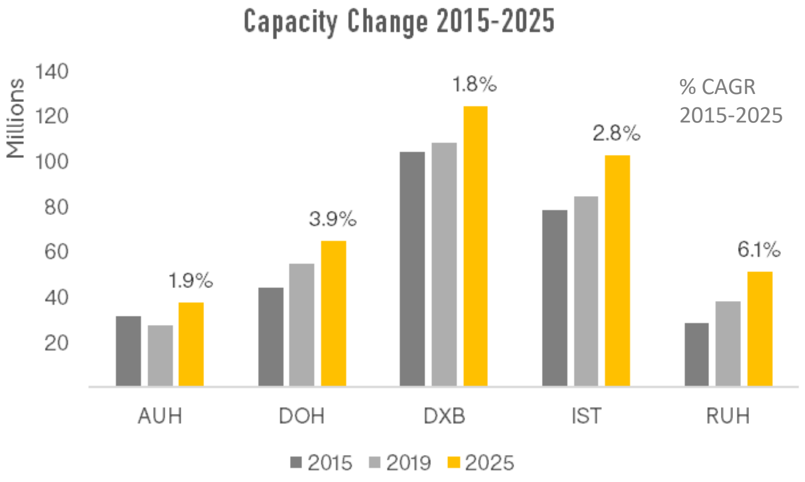
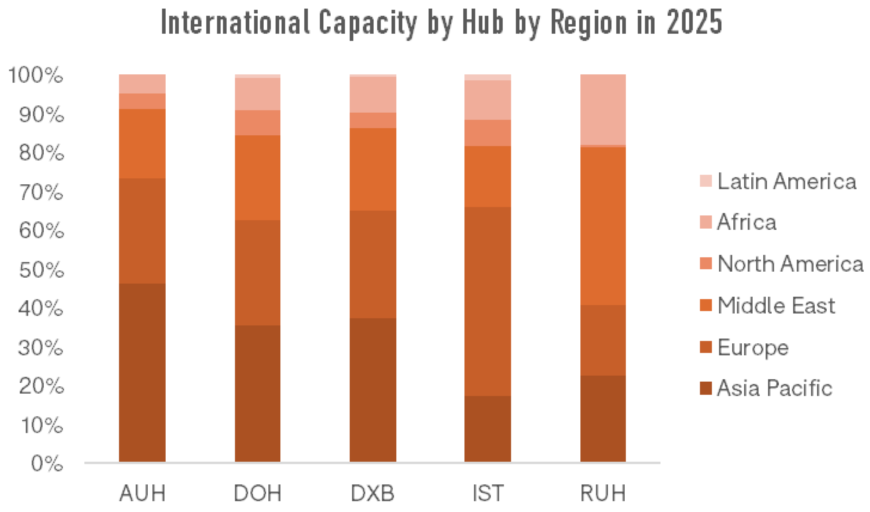
| | AUH | DOH | DXB | IST | RUH |
|---|---|---|---|---|---|
| Capacity (m) in 2025 | 37.7 | 65.0 | 124.4 | 102.7 | 51.2 |
| Routes Served | 156 | 192 | 284 | 326 | 118 |
| New Routes Added since 2015* | 75 | 68 | 80 | 92 | 43 |
| % Domestic | 0.0% | 0.0% | 0.7% | 13.8% | 22.0% |
| Main Carrier Share of Capacity | 66% | 82% | 74% | 81% | 43% |




- Dubai is the largest of the group, with capacity reaching 124m in 2025, up from 104m a decade ago. It is slowest growing though, with CAGR of 1.8% as it has become constrained
- Fastest growing is Riyadh, averaging 6.1% capacity growth each year for the last decade (despite the pandemic). This reflects the strength of the domestic market, and the Vision 2030 ambition and pursuit of greater connectivity
- Asia Pacific and Europe represent the most important markets for most of this group of airports, accounting for around 65-70% of capacity, except for Riyadh, where regional traffic to the Middle East still dominates. This is expected to change once Riyadh Air launches.

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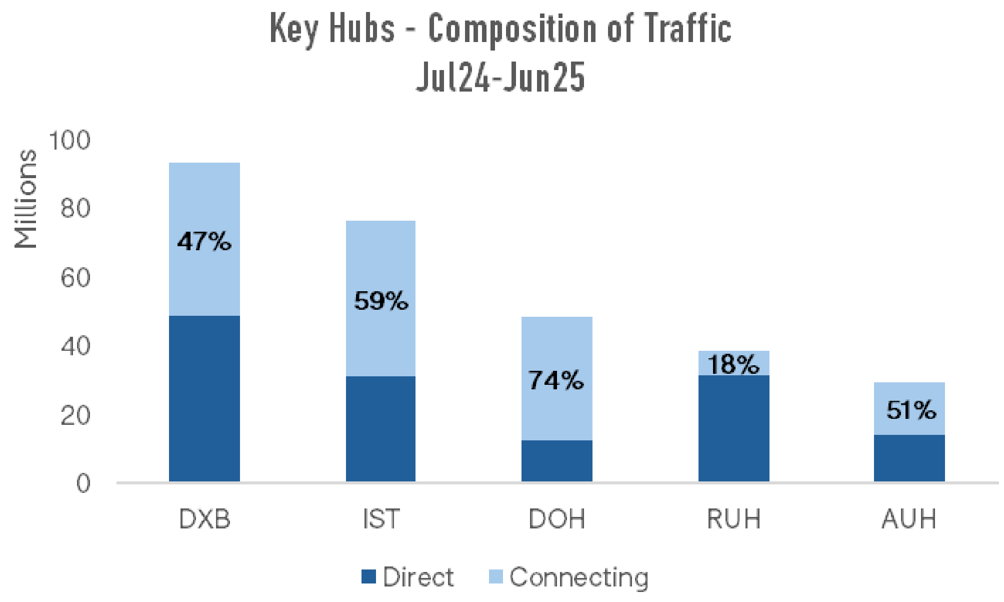
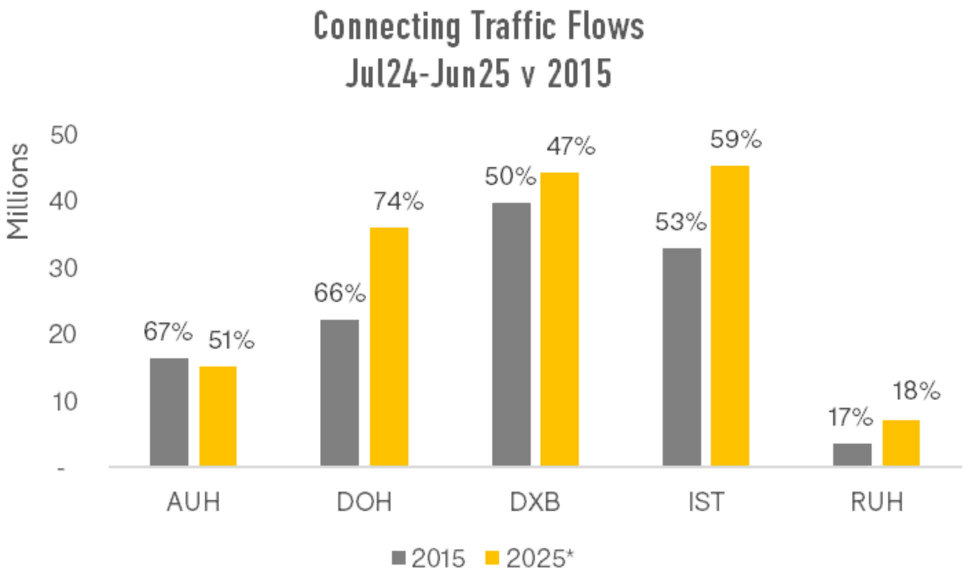
*New Routes based on unserved in 2015 and > 1,000 seats in 2025.

# How has connectivity evolved?




* Connecting Traffic for 2025 is for the 12 months to June 2025

- Doha has the largest indirect market, with 74% of passengers travelling via Doha en-route to their destination. It has also seen its share of connecting passengers grow from 66% in 2015
- Istanbul is a close second, with 59% of passengers connecting, up from 53% in 2015
- Connecting traffic as an overall share of passengers has fallen at Dubai from 50% in 2015 to 47% now. This means that more than half of Dubai's passengers start or end their journey in Dubai
- Abu Dhabi (Zayed International) has also seen the volume of connecting passengers fall from 67% to 51%
- The level of connecting passengers at Riyadh has not changed significantly in the last decade, but is likely to increase as Riyadh Air offers greater connectivity

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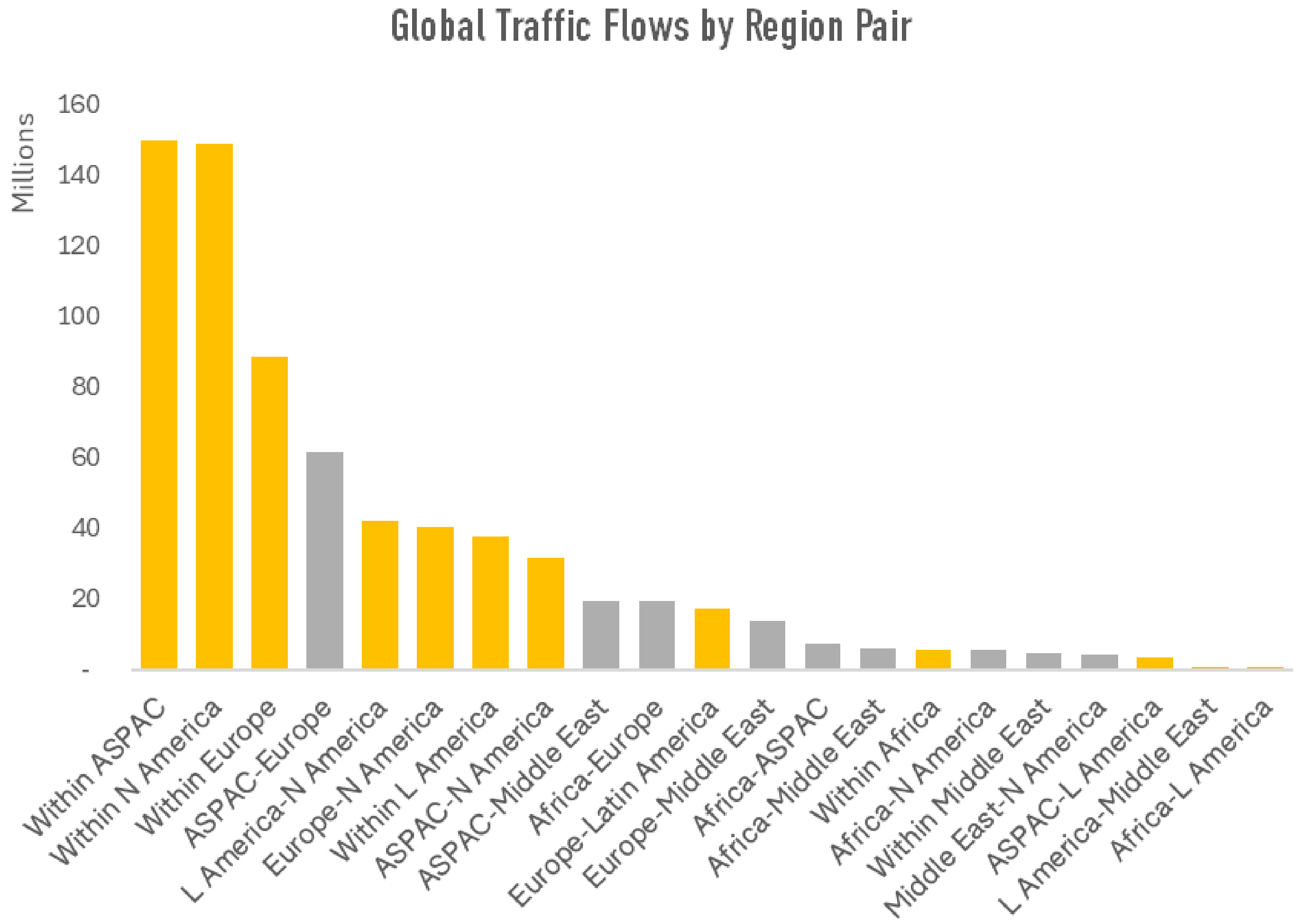
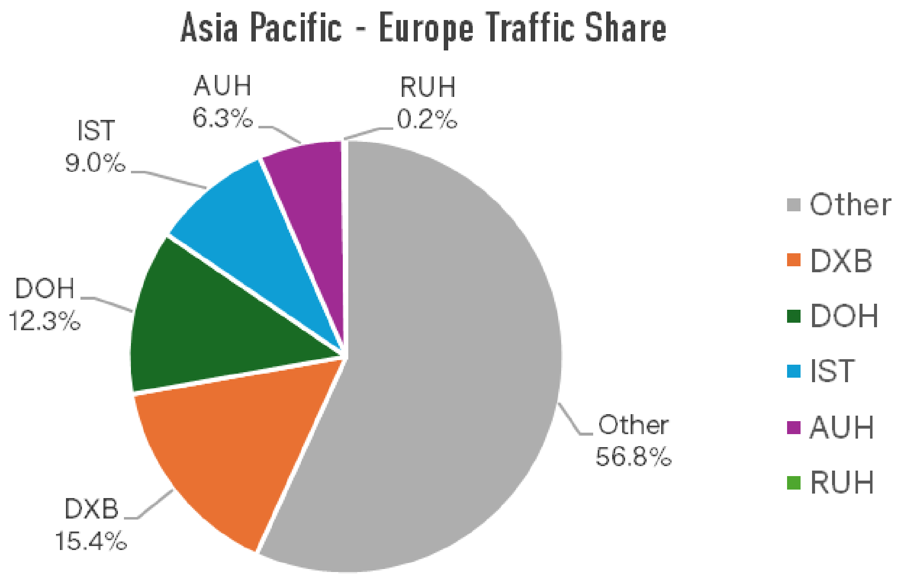
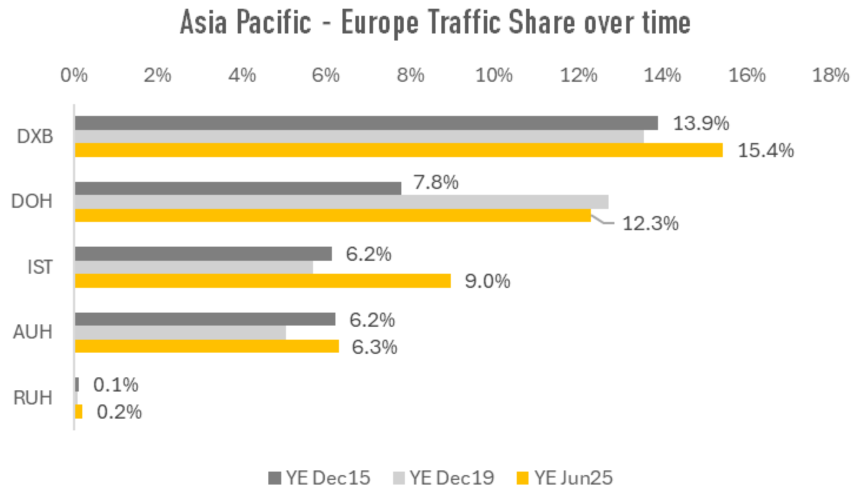
# Where is the superconnector market?

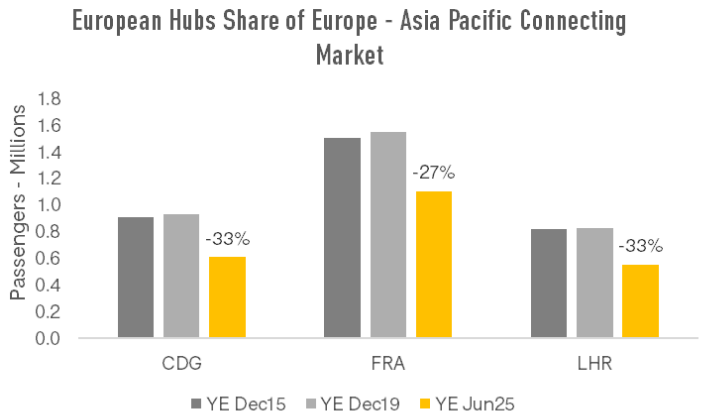



- The 4th largest global flow of air traffic is between Asia Pacific – Europe which is a key target market for the Middle East hubs, accounting for 9% of global traffic for the 12 months to Jun 2025
- Asia Pacific – Middle East and Africa – Europe are also within the Top 10 global regional flows
- Connecting traffic flows at the key Middle East hubs, and Istanbul have seen considerable growth in the last decade

# How has the landscape changed?




- For the 12 months to Jun 2025, the Middle East and Turkiye major hubs capture 43% of the traffic flows between Asia Pacific and Europe. This has increased significantly from 34% 10 years ago, and 37% in 2019
- Dubai retains the largest share amongst this group of airports, capturing over 15% of Asia Pacific – Europe traffic
- Doha has grown its share of this market significantly, up from 7.8% in 2015 to 12.3% in 2025
- Istanbul has also seen considerable growth in share, increasing by 3 percentage points to 9%
- European hubs have seen their share of the Europe – Asia Pacific connecting market fall by around a third. Collectively Heathrow, Paris and Frankfurt did account for 10% of connecting flows in 2015, now this is 6%

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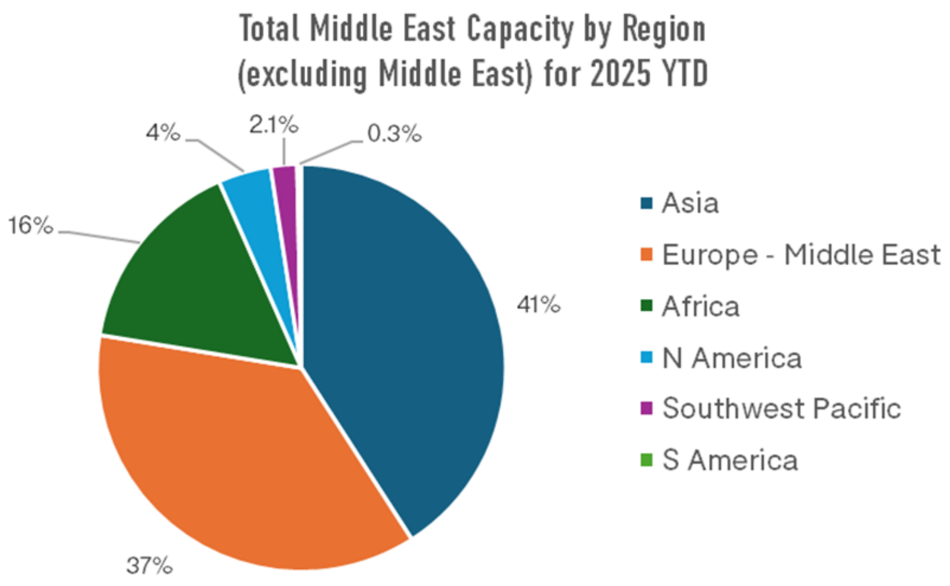
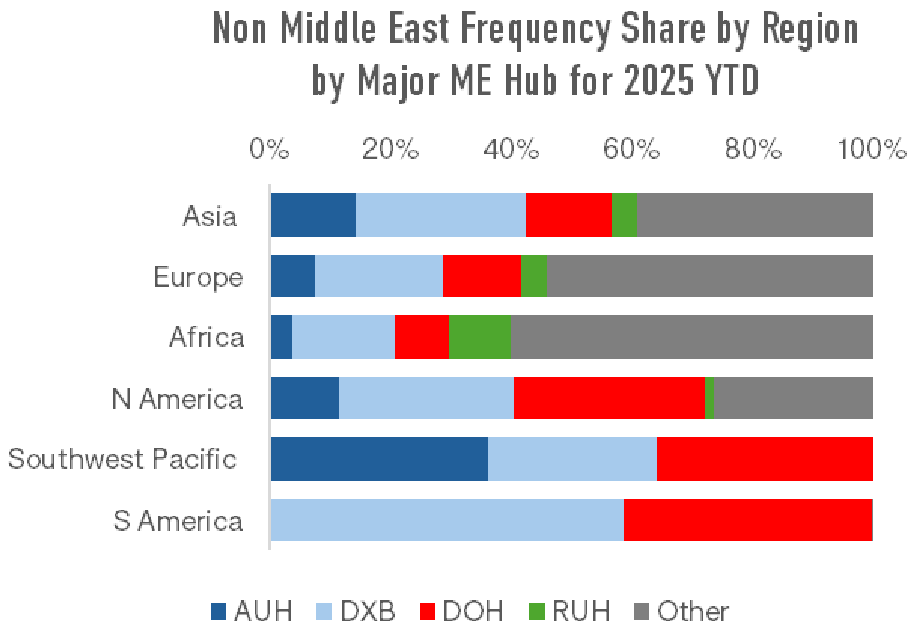
# Almost two thirds of Middle East capacity operates outside the region




- 57% of Middle East capacity operates on international services to destinations beyond the Middle East.
- For the year to September 2025 the largest markets are Asia, Europe and Africa respectively. Collectively these 3 regions account for 93% of the region's international capacity (excluding the Middle East).
- In the second chart we show the frequency share each of the Middle East's largest hubs have of each regional market – Dubai dominates in most markets, with Doha a close second.

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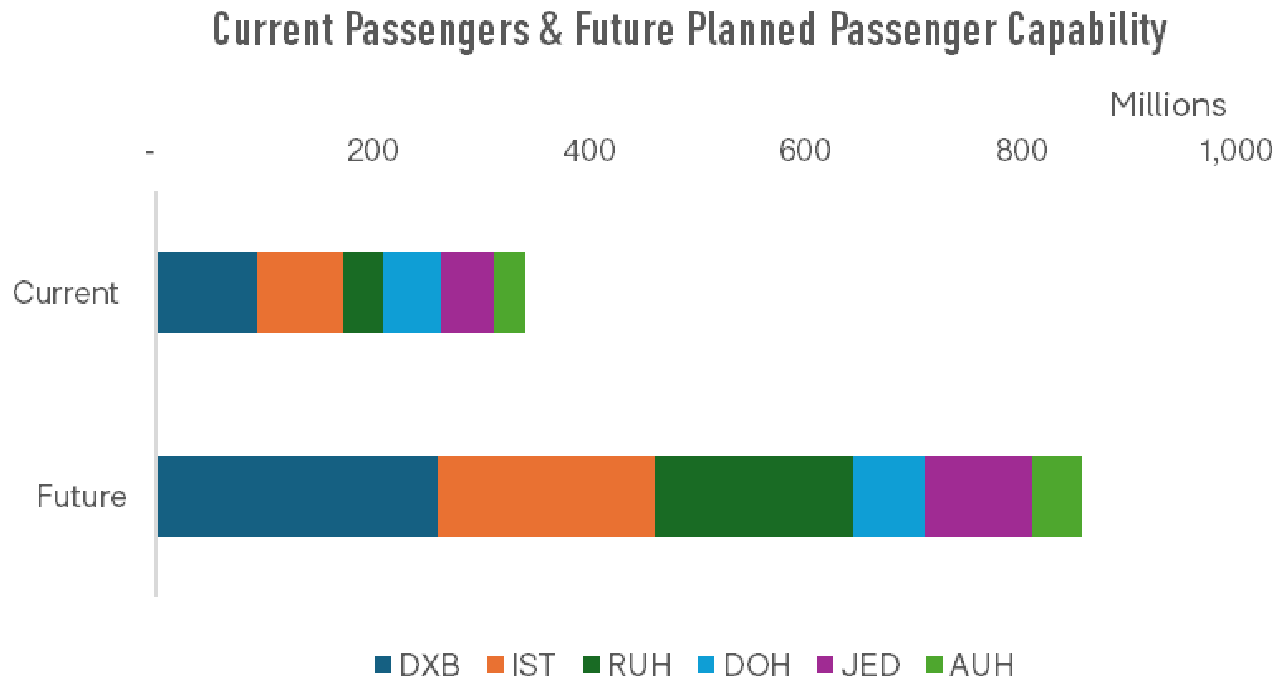
# Airlines as enablers



# What does the future hold?




- Current passenger throughput for these major airports in the region totals 341m. In terms of what is planned to be constructed in terms of new runway and terminal building capacity by 2050 (based on latest estimates) airports in the region are planning for 844m passengers –more than double today's passenger volumes.
- While this seems like a significant increase, growth rates in the region are forecast to be above 5% annually for the rest of the decade, and slowing to 4% thereafter, meaning these kinds of volumes by 2050 are not unrealistic.
- The big question is, will passenger shares across these global hubs remain the same or are there big changes to come?

# Competition hotting up

KSA - Riyadh

- Saudi's Vision 2030 programme means significant airport infrastructure is underway.
- Construction of a new 6 runway airport at Riyadh – King Salman International – is underway . Phase 1 will have capacity for 120m passengers annually, growing to 185m by 2050.
- How much connecting traffic can the new airport secure?

UAE – DXB/DWC & AUH

- Dubai's DXB is now constrained and there is work underway to relocate it to a bigger site at DWC, within the next decade, allowing the airport to grow from 93m to 260m passengers ultimately
- Abu Dhabi's Zayed International Airport is growing fast, and can handle up to 45m passengers annually

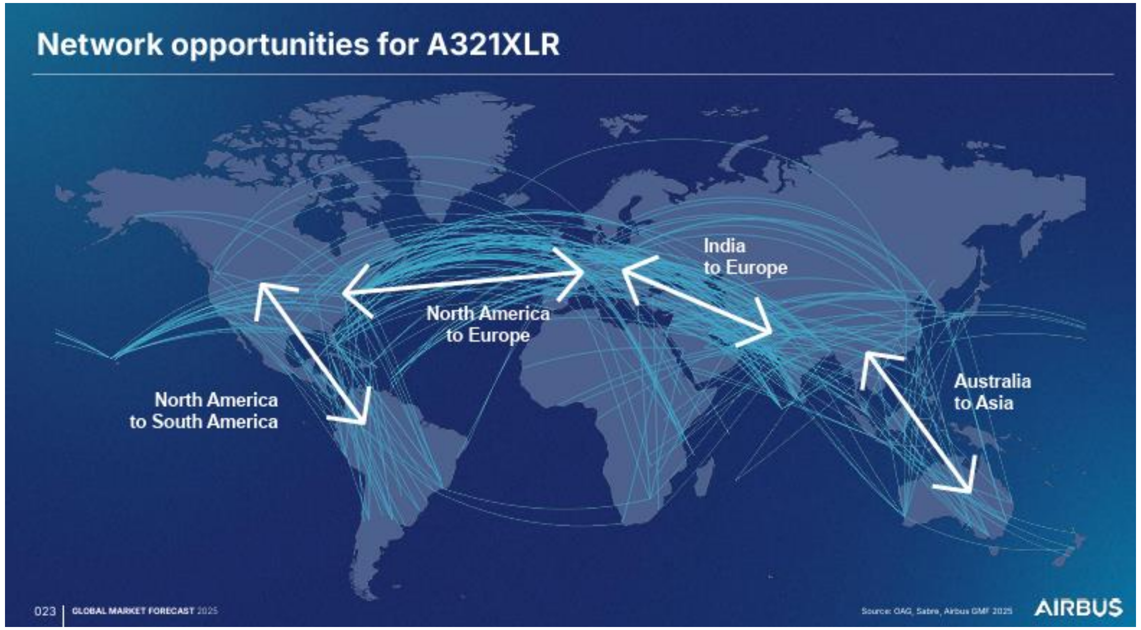
Istanbul IST

- With airport capacity of 120m expected by the end of 2025, planned infrastructure works at IST will increase capacity to 200m by 2028.
- How much more growth to come from Turkish Airlines?

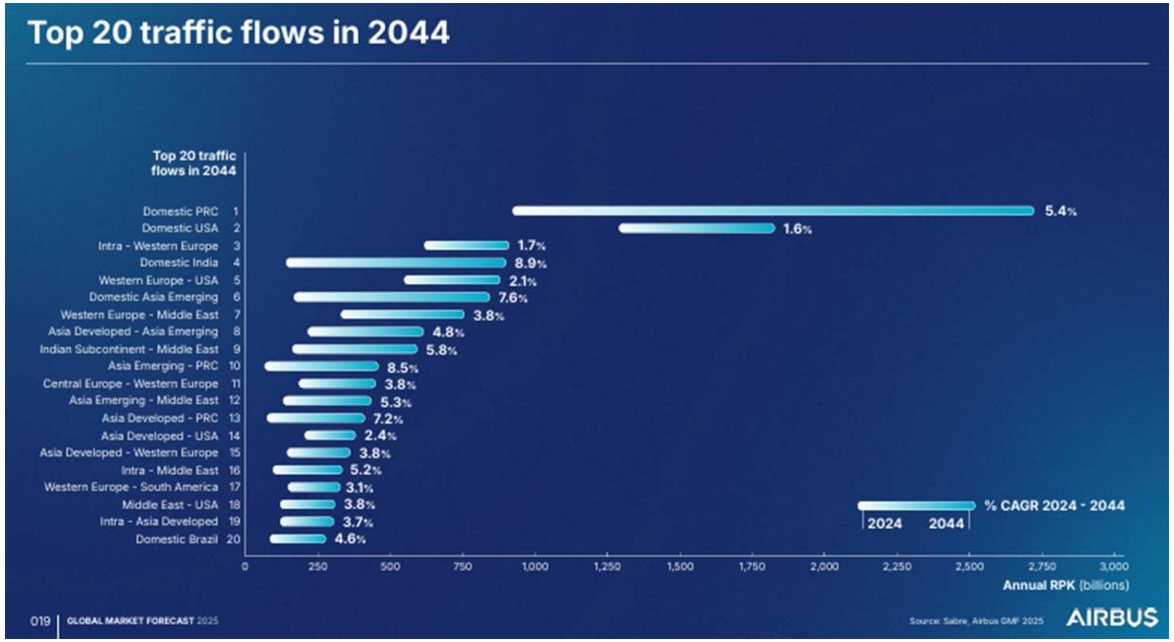
Doha DOH

- Current capacity for 65m passengers
- Longer term infrastructure development appears further out

# Challenges & Opportunities




- Geopolitics – ongoing instability – market is still growing
- A321 XLR, the rise of Indian connectivity
- Can Riyadh catch up and disrupt the market?

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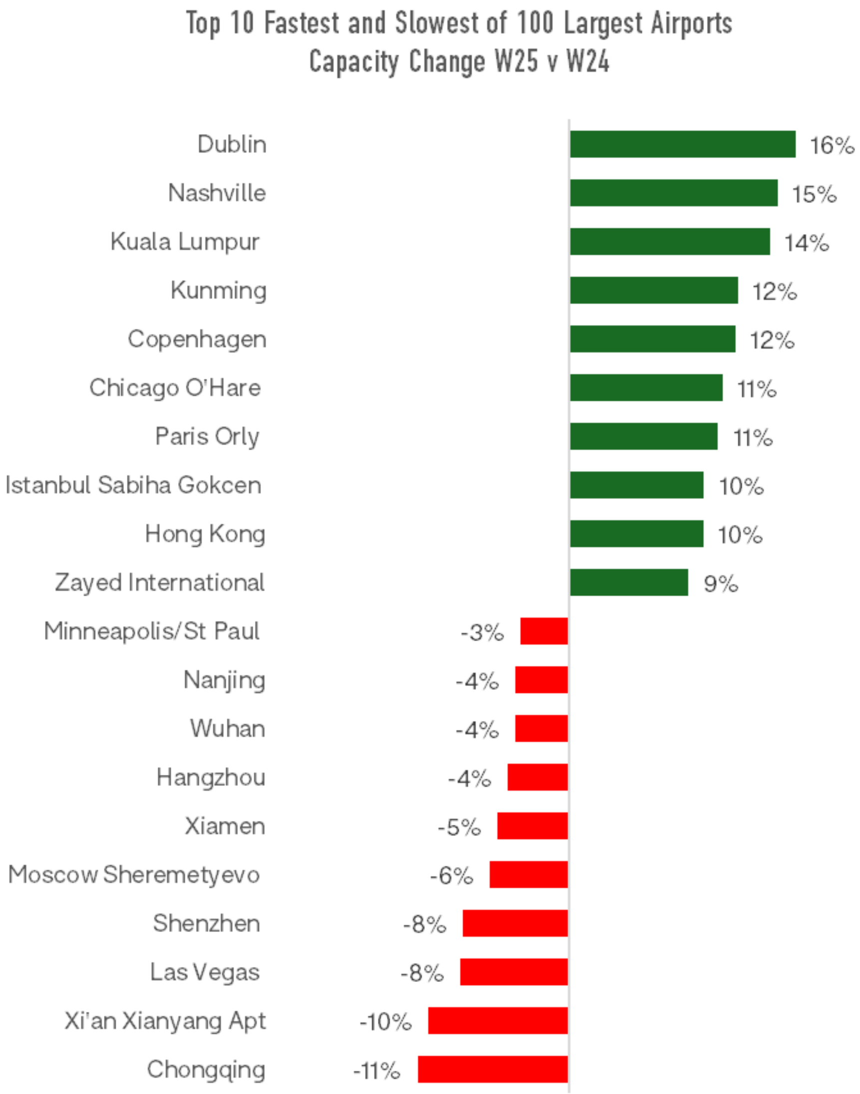
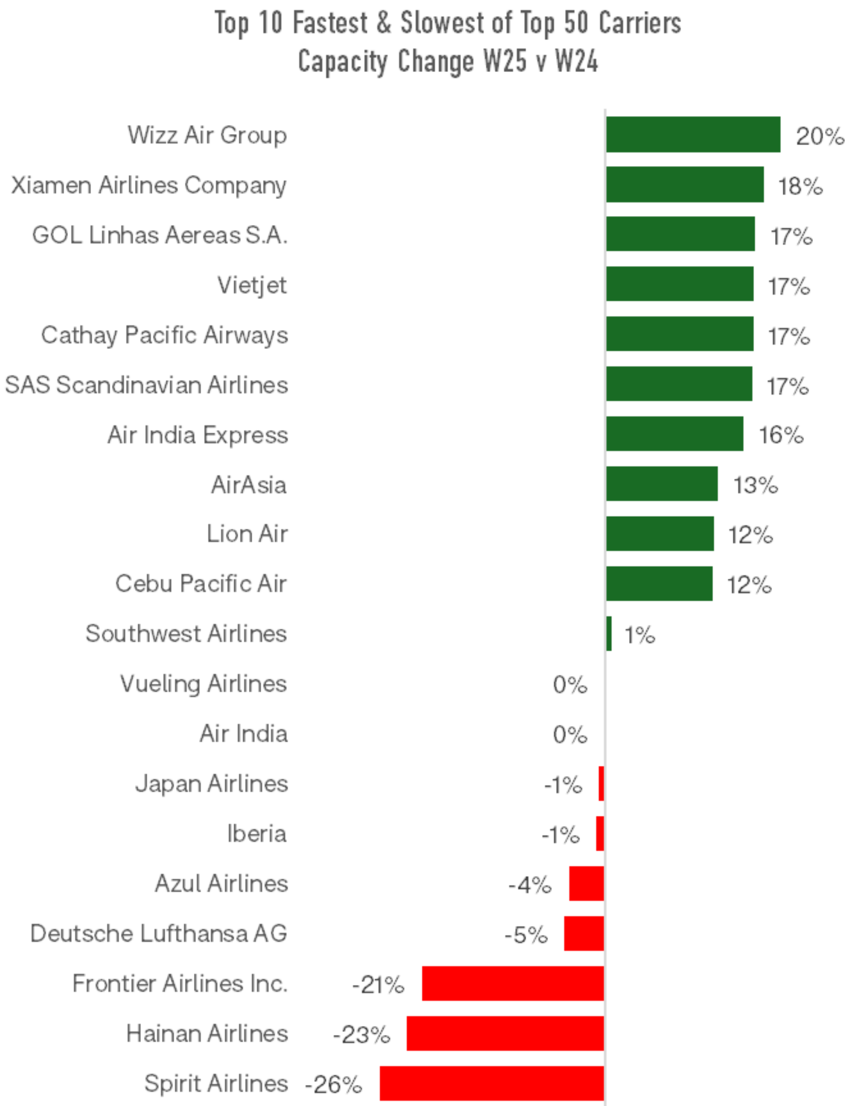
# Looking ahead to this winter



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