

Inflight Catering - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Inflight Catering Market size is estimated at USD 17.15 billion in 2024, and is expected to reach USD 25.87 billion by 2029, growing at a CAGR of 8.57% during the forecast period (2024-2029).

The COVID-19 pandemic has resulted in a full-scale crisis, with the imposition of travel restrictions and the suspension of flights in a global effort to contain the spread of the virus. Due to the safety regulations, some airlines served cold meals/pre-packaged food to their passengers with bottled drinking water. Though the sector has shown signs of improvement in 2021, the passenger traffic, especially international, was significantly lower than that of the pre-COVID-19 levels. Nevertheless, the airlines in the North American and European regions have been gradually re-introducing their pre-COVID-19 meal menus.

Though food practices have always been the priority of caterers, the pandemic has brought new dynamics and essential safety protocols to professional commercial aviation kitchens as the old protocols were designed for fending off foodborne illnesses only. The pandemic is also responsible for elevating catering standards in food safety, cleaning, and sanitizing but resulting in inflight caterers incurring additional expenses to ensure the optimized standards.

With the competition among the airlines growing, they are opting for certain strategies to enhance the inflight dining experience. These strategies range from the process of ordering to food serving. Such developments may have a long-term effect on the prospects of the market in focus during the forecast period.

Inflight Catering Market Trends

Competition in the Industry to Enhance the Inflight Dining Experience

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With the competition among the airlines increasing, they are opting for certain strategies to enhance the inflight dining experience. These strategies range from the process of ordering to food serving. Additionally, airlines are using different service strategies for different classes on the same flight to comply with hybrid operational scenarios while providing service to the customers. For instance, while providing high-level services at a premium price to high-value customers (in business and first-class), airlines are also offering lower price alternatives to passengers in the economy class, thereby establishing tier-based complimentary onboard services. To make the process of ordering food easier for passengers, airlines are providing options like meal pre-selection, meal pre-order, and mixed buy-on-board/complimentary catering to passengers. The provision of pre-ordering meals has also helped enhance the confidence of consumers in favor of inflight food services. Pre-orders are significantly on the rise, with the provision of 'free' pre-order programs for the business and premium economy classes. However, in Asia-Pacific, paid pre-orders are still generating lesser revenues, especially for the economy class. Some vendors have reduced the number of their pre-order offerings for the economy class. Nevertheless, there have been a variety of new options devised in the paid pre-ordering of meals. As the aviation industry recovers from the effect of the COVID-19 pandemic, carriers are expected to work closely with catering service providers to improve the quality of food served on planes, which is a matter of concern in today's inflight catering industry. The versatility in cultural dining always adds to the comfort and interest of travelers. For instance, in international flights flying to regions where there is a huge level of diversification in food habits, such as the Middle East, caterers are designing meals in accordance with their understanding of the tastes of destination flyers. Therefore, the commuters appreciate the cuisine of the upcoming destination, helping them familiarize themselves with the taste of the new culture.

North America is Anticipated to Witness the Highest Growth During the Forecast Period

According to IATA, although the full-year passenger traffic of North American airlines fell by 65.6% compared to 2019, the region still held the largest share of passenger traffic (RPK) in the world, accounting for about 32.6% share of the global RPKs. In 2021, as the passenger traffic increased, several airlines in the region are restarting transatlantic routes and inflight menus similar to their pre-COVID-19 times.

The North American diet varies considerably with each state. The eating habits of the two major North American countries, the United States and Canada, differ considerably from each other. In Canada, food intake in the Quebec region differs from the rest of the provinces. Smaller countries in the continent vary even more. So carriers have to arrange and stock up food accordingly, sufficing to their routes and the region they are operating in. The trend is, however, more toward eating healthy food, which is observed throughout the continent, particularly in the United States. More than 1/4th of the US citizens still consume fast food every day, but the percentage is dropping gradually. Healthy food has achieved significant traction. Foods like yogurt, poultry, sandwiches, and fresh fruits have witnessed a spike in demand in the field of inflight catering. Besides, the country is also a large market for chocolates, bakeries, and other confectioneries. The demand for low-calorie meals has resulted in a significant change in food offerings during flights.

After the advent of the COVID-19 pandemic, additional quality measures have been implemented in the kitchens in the region to ensure zero transmission of infection via onboard food. Also, during 2020 and the first half of 2021, airlines made drastic cuts to their inflight catering services. However, as the situation improved and airlines introduced new safety measures, they have re-opened some lounges and expanded their onboard food and beverage offerings. Such developments are expected to drive the growth of the North American region during the forecast period.

Inflight Catering Industry Overview

Gategroup, LSG Sky Chefs, Cathay Pacific Catering Services (H.K.) Ltd, The Emirates Group, and SATS Ltd are some of the leading companies in the inflight catering market. However, when it comes to supplying from small and medium-size airports, the market is witnessing an increased presence of regional players. Demand for food with high quality and safety was the main reason for

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airlines to prefer catering from major manufacturers to the regional players. Furthermore, these big players have increased their R&D spending exponentially to integrate innovation with culinary excellence. This has resulted in premium quality food for airline inflight catering. The resumption of on-demand inflight catering services in many key markets across the world is expected to help the growth of the players in the years to come. Also, players are expected to focus on food hygiene and safety as passengers and airlines become increasingly cautious regarding the spread of COVID-19.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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