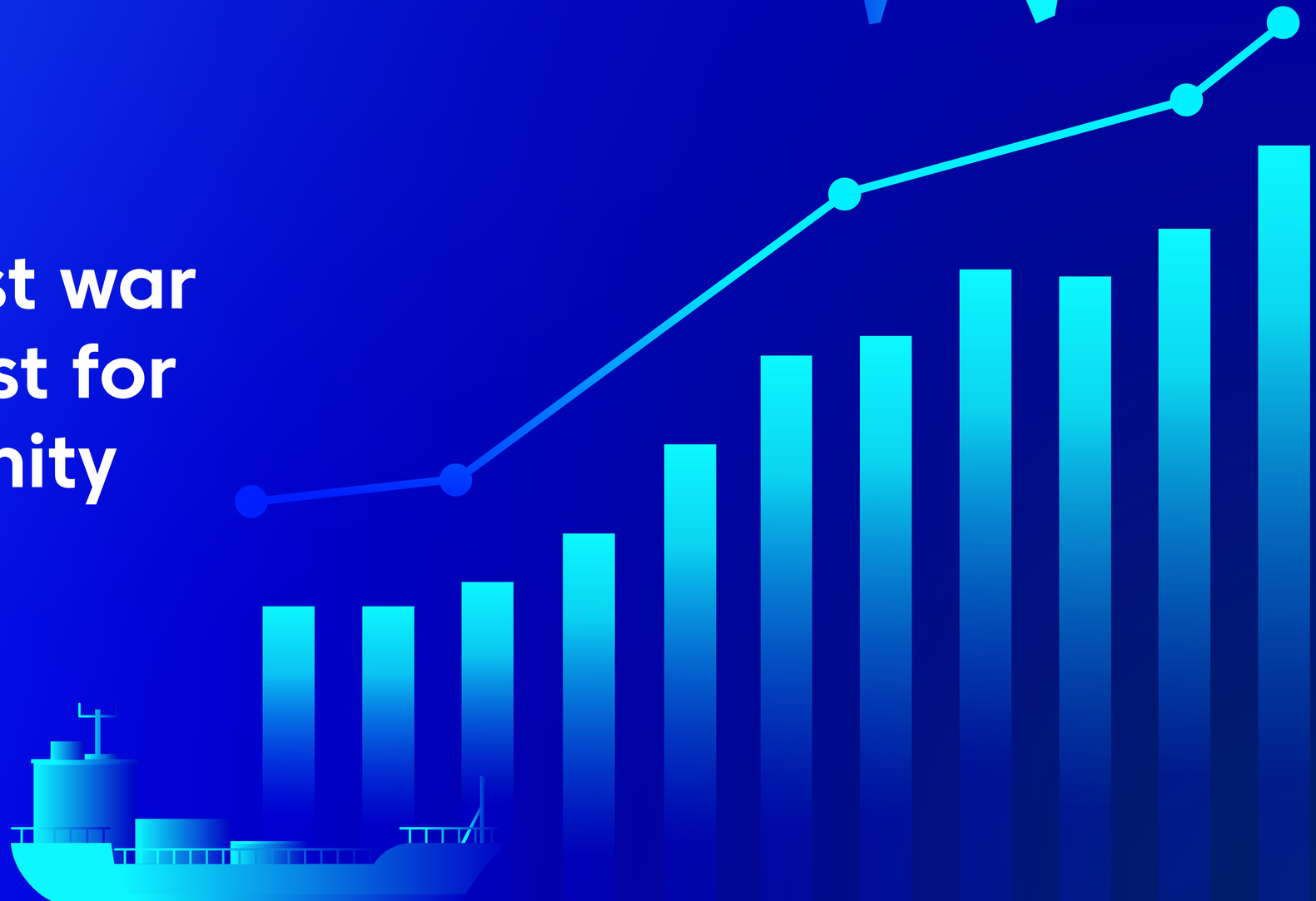
ATPI Marine Travel

Market intelligence update

How the Middle East war affected airfare cost for the Marine community



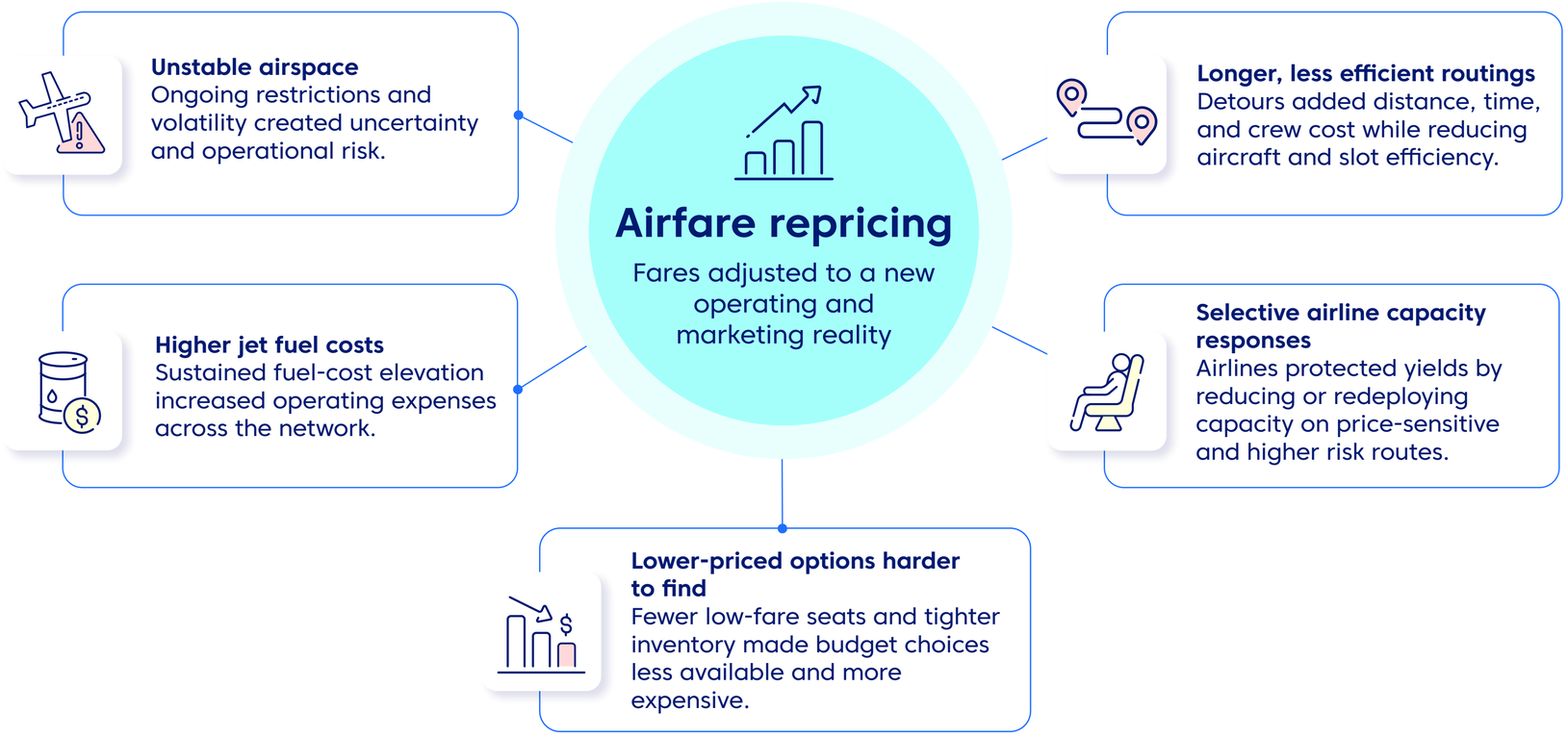
Airfare Cost Intelligence | April 2026

How the Middle East war affected airfare cost for the Marine community

Why airfares increased in March and why recovery may be slow

An ATPI Marine Travel assessment of how the Middle East conflict reshaped crew change logistics, driven by airspace and routing disruptions, constrained capacity, a reduced availability of lower-priced options, and further compounded by higher jet fuel costs from early March 2026.

What drove the March repricing



Marine lens

For marine travel, the issue was not only higher fares, but a less workable booking environment for crew changes, seaman tickets and operationally fixed movements.

Executive snapshot

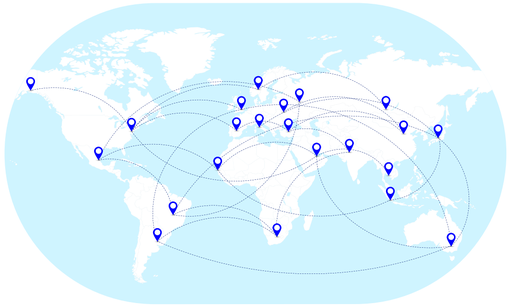
Three messages frame the March repricing from a marine travel perspective.

Since the onset of the conflict in the Gulf, disruptions to crew change logistics were not the result of a single isolated trigger.
It reflected a broader disruption, primarily in long-haul travel conditions affecting crew changes, offshore/project mobilization and other operationally fixed marine travel.

A wider market shock, visible booking stress, and slow normalization

1

Not a single-route anomaly



Airspace disruption

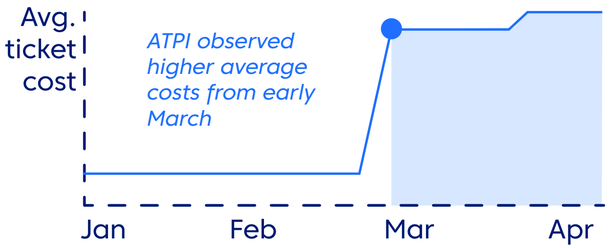
Hub connectivity

Schedule reliability

Bookable does not always mean affordable.

2

Stress became visible in bookings



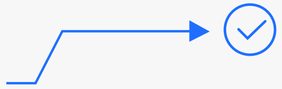
Low-fare options scarcer

Airline mix shifted

3

Relief may lag the headlines

Headlines improve fast



Operational recovery takes longer

Schedules

Fuel

Fleet flexibility

Summer slack

Recovery usually lags sentiment.

Executive takeaway

Current conditions point to continued fare pressure through 2026, especially across exposed long-haul markets, rather than a broad and immediate return to pre-March levels.

From airspace disruption to crew change logistics risk

When operations fracture, prices catch up

Once regional airspace destabilized and key connecting flows were disrupted, network efficiency started to collapse well before fares visibly moved.

A route could remain visible in booking tools while becoming less attractive in practice: longer journey times, weaker and more complex connection logic and displaced aircraft made the network more fragile and increased operational exposure.

For crew change logistics, this distinction is critical. Practical availability matters more than theoretical seat supply. An itinerary that adds connection risk or erodes schedule certainty may no longer support a vessel or project timeline, even if it is technically bookable.

Takeaway
Bookable does not always mean operationally workable or commercially attractive.

Marine lens
For crew travel, the right itinerary is not only the cheapest one - it must be workable, recoverable and aligned with operational windows.

Systemic crew change constraint

A simple cause and effect sequence for marine crew travel buyers.

For marine crew change travel, reliance on Middle East airspace and Gulf hub connectivity turned localized disruption into a systemic constraint primarily across long-haul networks.

Market tightening did not require visible capacity loss: displaced traffic, longer routings, and marine companies' duty-of-care obligations reduced usable itineraries even after some Middle Eastern services technically returned.

Fuel-driven cost pressure on airlines further accelerates last-minute flight removals, undermining schedule reliability and compounding operational fragility with outsized impact on time-sensitive crew movements.

However, as detailed in the Appendix, fuel dynamics interact with routing, hedging constraints, and recovery limitations rather than acting in isolation.

Why air ticket prices rose

Airspace disruption

Unstable corridors changed normal connection and recovery logic.

Longer, less efficient routings

Detours increased journey time, exposure and operating cost.

Selective capacity responses

Usable, policy-compliant options narrowed even without a full capacity loss.

Lower-priced options harder to find

Cheaper fare classes disappeared sooner in stressed booking windows.

Jet fuel pressure

Fuel reinforced cost pressure after the network had already become less efficient.

What buyers felt in practice

Seats could still exist. but not necessarily at the cheaper fare levels or on the more efficient routings normally expected for seaman tickets and crew changes.

Marine lens

When travel is operationally fixed, reduced low-fare availability turns quickly into higher realized ticket cost.

ATPI data evidence: from headlines to crew change booking reality

ATPI weekly marine and seaman ticket data as well as travel consultants' observations support that the disruption moved beyond headlines and into actual booking behavior. From early March, the disruption did not only push fares higher; it also changed the complexity and routing mix which remained visible into April.

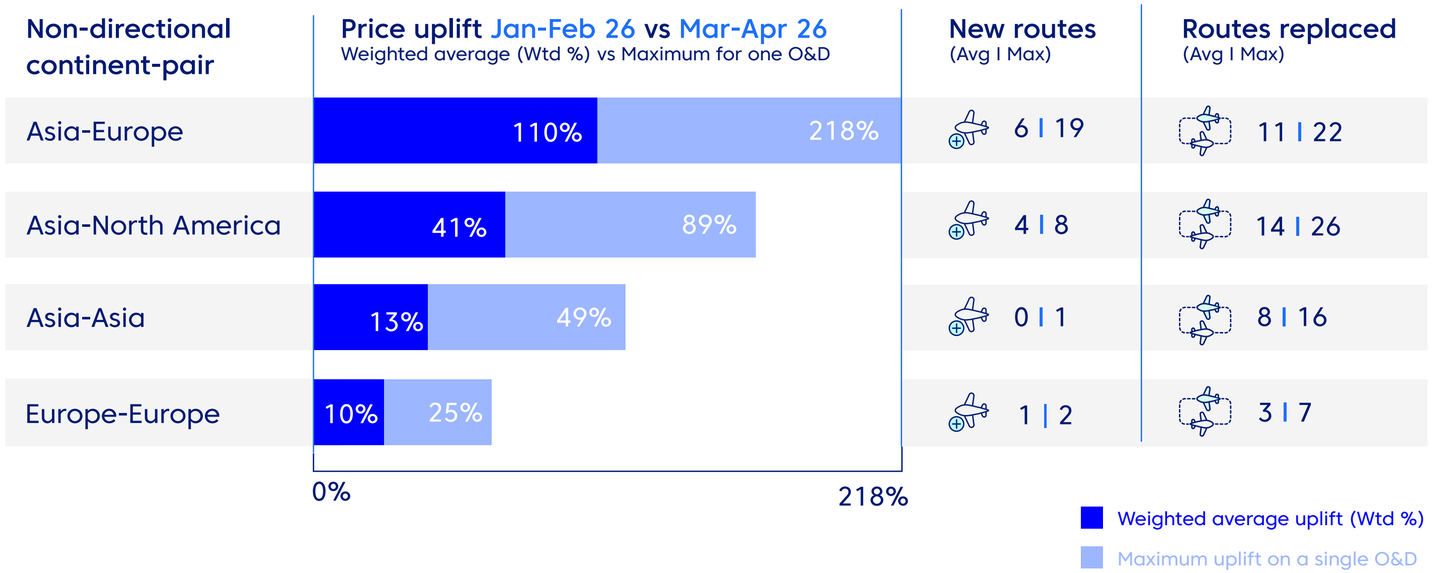
The strongest observed pressure sat on Asia-Europe, but the pattern was not limited to one corridor. Other flows also showed firmer pricing, though with different levels of exposure and intensity.

Hotspot cases reached 218% airfare increase, new routings appeared and previously used routings dropped out of the mix.

Takeaway
The data supports a market-reshaping story, not a one-size-fits-all fare claim.

ATPI Observed: corridor-level impact

Fare uplift and routing churn from Jan-Feb 2026 baseline to Mar-Apr 2026
Disruption not only pushed fares higher, it also changed the routing mix. The chart shows weighted average uplift (dark blue) and maximum uplift observed on a single O&D (light blue), alongside routing churn.



When routing complexity became an operational risk

The complexity impact was also visible in journey structure as typical trips became more complex with average stops increasing and fewer direct flights. Additional stops are not only a passenger inconvenience. For crew travel, they can increase misconnection risk, reduce schedule certainty and make recovery harder if one sector is delayed or cancelled.

This matters because seafarer movement is tied to vessel schedules, joining dates, project mobilization windows and rest considerations. A more complex itinerary can create downstream disruption even when the ticket price is accepted.

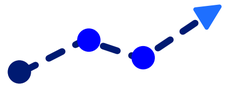
That is why routing complexity should be read alongside fare pressure. A market can become more expensive and less operationally resilient at the same time.

The same booking data shows a marked increase in travel to and from India, Sri Lanka, South Africa, China, Spain, Egypt, and Turkey. This shift reflects a deliberate recalibration of crewing and mobility strategies, as shipping operators reshape crew nationality mix and crew-change ports to reduce conflict exposure and protect operational resilience.

Takeaway
The marine lens turns market disruption into a practical crew-mobility issue in which route quality is part of cost control.

Routing complexity increased on key exposed corridors

ASIA-EUROPE



+0.30
avg stops

+21.6pp
share on 2+ stop routings

MOST VISIBLE COMPLEXITY SHIFT

ASIA-NORTH AMERICA

+0.11
avg stops

+16.5pp
share on 2+ stop routings

SMALLER BUT MATERIAL SHIFT

ASIA-ASIA

No material increase

Negligible
2+ stop share

MORE LOCALIZED EFFECT

EUROPE-EUROPE

No material increase

Negligible
2+ stop share

LEAST EXPOSED IN THIS VIEW

Higher impact — Lower impact

Marine lens
For crew travel, more stops can mean weaker connection quality, higher misconnection risk and fewer recovery option.

A more practical reading of the data

The evidence should not be read as a uniform shock across every route. It shows that buying conditions reshaped:
The disruption altered the market through cost pressure and increased journey complexity, widening fare dispersion and making workable itineraries more challenging.

Impact varied by corridor, routing logic and availability conditions, which is exactly why average movements and route-level hotspots should be read together.

At the operational level, fewer viable combinations and less predictable routing increased exposure for time fixed crew movements, further intensifying existing crew change logistics pressure.

For marine companies, this means decisions must extend beyond the lowest visible fare and prioritize itinerary resilience, recovery options and the cost of last-minute unexpected disruption.

Takeaway
A careful reading is stronger than an absolute forecast.

1

Corridor exposure matters
Asia-Europe carried the clearest observed pressure, but the stress was not isolated to a single flow.

2

Availability matters
Lower-priced options can disappear before seats disappear, changing the real buying environment.

3

Operational timing matters
Fixed crew-change and vessel/project timelines reduce the ability to wait for better market conditions.

Near-term Market Outlook: navigating an uneven recovery

Headlines can improve before the market normalizes

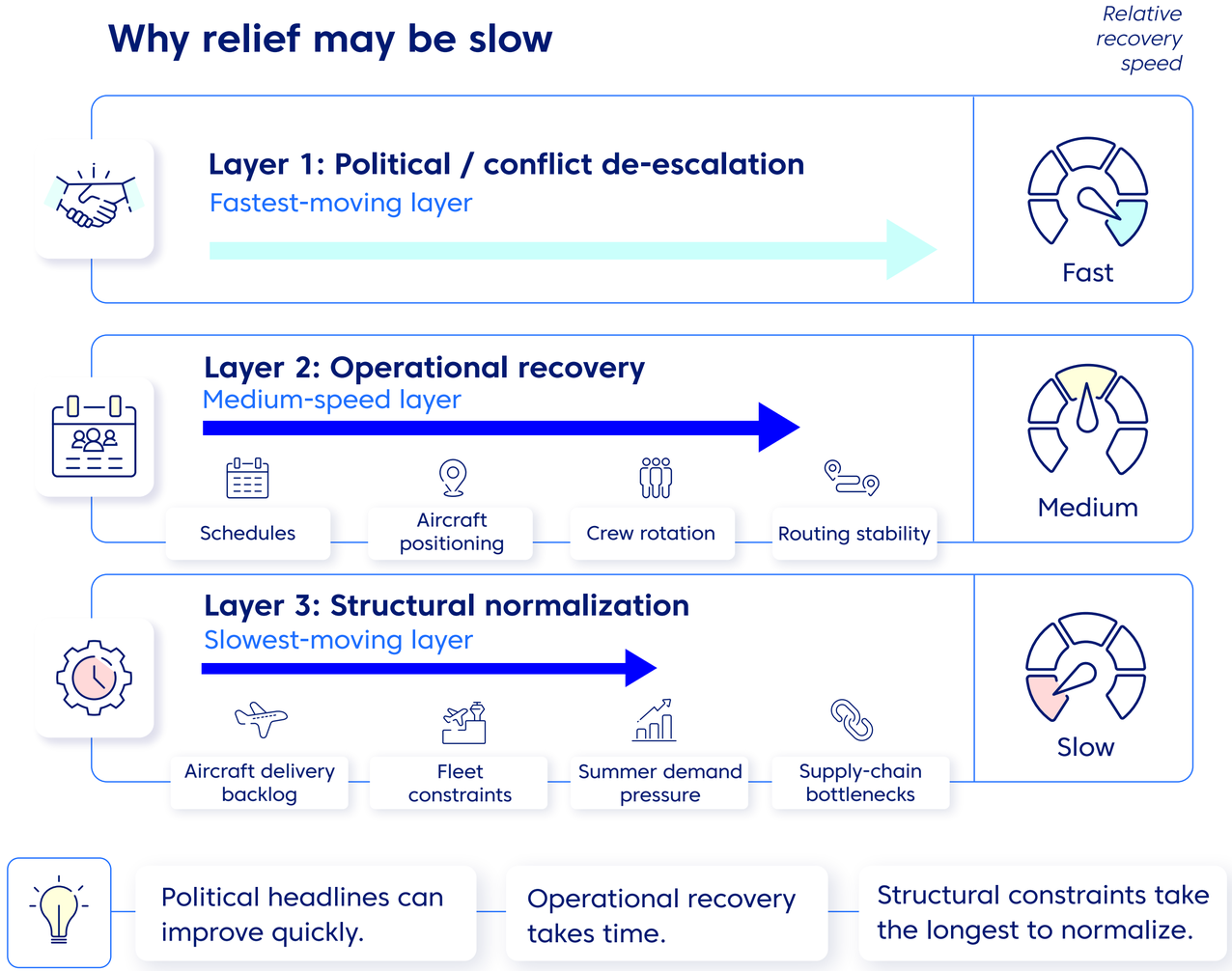
Aviation networks do not reset overnight. Schedules need to be rebuilt, aircraft and crews repositioned, and commercially viable connection structures stabilized before the buyer experience improves materially.

Fuel and refining recovery can also outlast the peak news cycle. Even when geopolitical intensity falls, supply, logistics, insurance and operational confidence may normalize at different speeds.

The industry entered the disruption with little room to absorb additional disruption because aircraft delivery delays, engine constraints and supply-chain bottlenecks were already limiting how fast capacity could return. Summer demand can further slow visible fare relief.

Takeaway
End of war and return to normal pricing should not be treated as simultaneous events.

Why relief may be slow



What the marine community should prepare for

Signals that show whether conditions are normalizing or whether pressure is continuing

Airspace & risk notices

If conflict-zone advisories remain active or are extended, the operating environment remains abnormal even when corridors are technically open.

Jet fuel availability & price

Fuel shortages, refining stress and related disruption remain among the clearest near-term signals of whether cost pressure is easing.

Airline offsetting policies

New or higher change, cancellation, baggage and related charges can signal that airlines are still protecting margins rather than normalizing.

Tightened fare rules & refund penalites

Greater intolerance for flexible booking behavior may put pressure on the availability of refundable or fully flexible marine fares.

Re-routing intensity

Affected flights, extra passenger miles and additional fuel burn show whether the network is becoming more efficient again.

Airline financial stress & consolidation pressure

Fragility among smaller carriers and rising consolidation risk can keep effective capacity and competitive choice constrained.

Fleet & delivery constraints

Aircraft backlog, supply-chain bottlenecks and maintenance delays matter more for medium-term relief than optimistic headlines

Airline labor disruptions & strike activity

Labor fragility can trigger sudden disruption, weaker schedule reliability and uneven capacity recovery in an already tight market.

ATPI observed booking conditions

The most practical improvement signals are whether lower-priced options return, quote dispersion narrows and long-haul airline options stabilize.

Marine lens

For the marine community, improvement is visible only when booking conditions become more reliable for crew changes, seaman tickets and other operationally fixed travel.

Conclusion

Air ticket prices rose from early March 2026 because the market absorbed several pressures at once: unstable airspace, less efficient routing, fuel pressure, selective capacity responses and reduced availability of lower-priced options.

ATPI's booking data shows the market adjusting under pressure: the pool of price-efficient itineraries narrowed, routing behavior shifted as operators favored certainty and recoverability over optimal cost, and crew change travel costs rose above the January–February baseline.

Recovery may therefore be gradual. The aviation system still needs to rebuild operational efficiency and network resilience against a backdrop of fleet constraints, fuel-market risk and seasonal demand pressure, delaying the return of lower-fare availability.

Planning implication
Current conditions point to continued fare pressure through 2026, especially across exposed long-haul markets, rather than a broad and immediate return to pre-March levels.

Takeaway
Regardless of the scenario, conditions point to a drawn-out normalization, with costs staying elevated and capacity tight as cautious carriers and seasonal demand prevent a swift or even recovery back to baseline.

Scenario lens

Possible paths for airfare normalization

1 — *Most plausible*

De-escalation, but slow normalization

- Acute disruption eases
- Prices stay above pre-March levels
- Cheapest options return unevenly

Carrier caution persists

2

Prolonged instability

- Volatility remains high
- Pricing pressure continues
- Attractive inventory deteriorates faster

Planning conditions stay fragile

3

Summer-tight market without fresh escalation

- No major new escalation required
- Demand keeps the market firm
- Fleet and network recovery remain constrained

Rapid fare relief stays limited

Even if disruption eases, relief may still be slow because normalization in aviation usually lags the headlines.

Appendix

Why fuel cost relief does not arrive evenly

Fuel pressure mattered, but it did not act in isolation. Its commercial impact intensified as it fed into a vicious circle of longer routings, weaker schedule reliability, and fewer viable recovery options across exposed long-haul routings on which crew movements depend.

While hedging allows airlines to delay and moderate fuel cost shocks, it cannot eliminate fuel cost pass through during periods of persistent supply demand imbalance and price escalation, particularly when crew itineraries must meet duty of care and timing requirements.

Because airlines hedge to different degrees, or not at all, market responses to fuel shocks are uneven: some carriers absorb pressure longer and others raise fares or cut services sooner. The result for marine operators is fragmented relief, delayed adjustments, and persistently fragile crew change planning conditions.

Learn how the Middle East conflict is impacting business travel and what it means for your organisation. At ATPI, we help organisations stay ahead with real time intelligence, expert crew change travel management and tailored travel strategies that keep people moving safely and efficiently.

Discover how to strengthen and future proof your crew travel programme at www.atpi.com.

Jet fuel pressure remains a live cost variable

IATA planning assumption
$88/barrel
IATA 2026 jet fuel planning assumption

Airline operating cost share
25.7%
Estimated fuel share of airline operating costs

April 2026 warning
Jet fuel shortages could begin causing cancellations in Europe by end-May
IATA warning, April 2026

Fuel pressure
- Major airline cost item
- Sharp moves quickly affect operating economics

+

Network disruption
- Longer routings
- Weaker schedule reliability
- Tighter recovery options

=

Stronger commercial pressure
- Higher operating cost
- Less efficient network
- More pressure on fares and capacity decisions

Short haul

- More exposed to immediate fuel-driven cancellation risk
- Often affected where weaker demand meets higher operating cost
- Fuel share can weigh heavily on route viability

Long haul

- More exposed where rerouting adds distance and fuel burn
- Asia-Europe remains a key exposed corridor
- Harder to restore quickly once capacity is withdrawn or redeployed

Marine lens
Fuel pressure becomes more important when it lands on a less efficient network, because crew travel depends on workable routings, reliable recovery options and commercially manageable fares.

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Methodology and source notes

ATPI observations draw primarily on ATPI marine and seaman ticket data covering 2025 and year-to-date April 2026. January and February 2026 are treated as the principal pre-disruption baseline, with 2025 data used to validate normal conditions.

The continent-pair analysis is based on ATPI Top 100 Global Marine clients, identified top O&D pairs, and one-way economy seaman tickets booked 0-13 days prior to departure. Results are non-directional and intended to show observed pricing pressure and routing complexity, not uniform impact across all routes.

The document distinguishes ATPI-owned observations from wider public market context. External sections on fuel, hedging, structural tightness and network disruption External market context is supported by the approved source pack listed in the bibliography.

Recommended source spine: IATA fuel and airline-cost publications; ATPI internal observed booking data; public airline, airport and schedule updates; and credible industry reporting on fuel, capacity and recovery conditions.

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