

Middle-East Aircraft Engine Mro Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The Middle-Eastn aircraft engine MRO market is projected to record a growth rate of over 4% during the forecast period.

The COVID-19 pandemic has significantly impacted the revenue streams of the major full-service carriers in the region, as they rely immensely on international travel. While domestic travel has witnessed a significant rebound worldwide, the market for such travel is low in the Middle-East. On the other hand, several African airlines are awaiting government aid to recover from bankruptcy. Several airlines in the region have opted for early retirement of the aircraft to reduce operational and maintenance expenses, which may increase the availability of green time engines in the market.

Over the years, many global and regional MRO service providers, such as Lufthansa Technik, AMAC Aerospace, and JORAMCO, have expanded their MRO service networks through partnerships and joint ventures. This factor has propelled the growth of the aircraft MRO and related engine MRO market in the Middle-East.

Major regional economic powers, such as Saudi Arabia, Israel, Turkey, Iran, and Egypt, are spending significant amounts on the procurement of new aircraft. Several countries, especially in the African region, are also focusing on the procurement of refurbished aircraft and the upgradation of the existing military aircraft fleet. This factor is significantly driving the growth of the aircraft engine MRO market in the region.

Countries such as Saudi Arabia, the United Arab Emirates, and Qatar are actively participating in programs, such as the Carbon Reduction and Offsetting Scheme for International Aviation (CORSIA). Other countries are expected to join the aviation emission curbing programs, which may boost the growth of the aircraft engine MRO market in the region.

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Commercial Aviation Segment to Exhibit the Highest Growth Rate During the Forecast Period

The COVID-19 pandemic significantly affected the passenger traffic in the region during 2020-2021. Major airlines in the region, including the Emirates, Etihad, and Qatar Airways, have shifted their focus on the air cargo business, which has helped them mitigate the losses due to the diminished passenger demand. With the increasing pace of vaccinations in the Middle-East, international travel is expected to rebound in the next 3-4 years. Domestic traffic is expected to recover faster, driving a shift in the distribution of passengers within the region and contributing to the narrow-body fleet additions in the coming years. These deliveries might compensate for some of the widebody engine MRO demand lost due to the reduced deliveries and increased widebody retirements in the region.

On the other hand, several airlines in Africa are reeling from the financial crisis, further compounded by the advent of the pandemic. Airlines in Africa are awaiting government response regarding financial aid to help them recover from the pandemic. A significant portion of the aircraft fleets of these airlines remains in storage. These aircraft are expected to generate significant demand for engine MRO before flying again. During the forecast period, Africa is also expected to continue its reliance on migrations for fleet growth, especially from the Middle-East and Europe. Airlines in the regions are also expected to opt for green time engines instead of procuring new engines to reduce costs. However, this factor is expected to increase the need for MRO for these engines in the coming years. Such factors are expected to drive the demand for commercial aircraft engine MRO services in the region during the forecast period.

United Arab Emirates is Expected to Remain a Key Market for Engine MRO Services in the Coming Years

The United Arab Emirates is home to major airlines, such as Etihad Airways and Emirates, which were rapidly expanding and upgrading their fleet of passenger and cargo aircraft before the COVID-19 outbreak. With the advent of the pandemic, these airlines are now focusing on increasing their presence in the LCC sector through partnerships with other airlines. For instance, Air Arabia Abu Dhabi, which started its operations in mid-2020, is a joint venture between Etihad Aviation Group and Air Arabia. It became the first low-cost carrier based out of the UAE capital. Although airlines in the country possess significant MRO capabilities, they still depend on engine OEMs and third-party providers for engine maintenance, which has helped engine MRO providers increase their market in the country in recent years. For instance, in late 2019, Sanad, a major local engine MRO provider, signed a cooperation agreement with the Emirates Engine Maintenance Center (EEMC) to create new business opportunities via the development of dedicated repair and training facilities in the country. Sanad also plans to expand its existing maintenance and repair services to include the full overhaul of 315 GEnx engines until 2035.

On the other hand, the United Arab Emirates aims to enhance its defense capabilities by procuring new aircraft and developing inherent MRO capabilities. The country has expanded its military aircraft fleet by procuring several new fighter jets and transport/tanker aircraft. In November 2021, GAL, part of the EDGE Group, announced signing an agreement for Sanad to provide MRO services for Rolls Royce Trent 700 engines that power the UAE's Airbus A330 Multi Role Tanker Transport (MRTT) fleet. The United Arab Emirates is increasing its spending on developing the tourism and business ecosystem, which is propelling the demand for general aviation aircraft and general aviation aircraft engine MRO in the country.

MEA Aircraft Engine MRO Market Competitor Analysis

The aircraft engine MRO market in the Middle-East is fragmented. Some of the prominent players in the market are Safran SA, General Electric Company, Lufthansa Technik, CFM International, and Jordan Aircraft Maintenance Limited. OEMs control a major share of the aircraft engine MRO market in the Middle-East, with the other half roughly split between independent and airline overhaul shops. For new powerplant generations specifically, operators frequently outsource engine maintenance and use full

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MRO-support programs. Hence, most expansion projects in the regions are partnerships of airlines or third-party providers with engine OEMs. Also, several global MRO service providers are entering the Middle-Eastn market through contracts, joint ventures, or collaborations, which is expected to transform the market into a more competitive one in the coming years.

Additional Benefits:

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

Table of Contents:

1 INTRODUCTION

- 1.1 Study Assumptions and Market Definition
- 1.2 Scope of Study
- 1.3 Currency Conversion Rates for USD

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

- 3.1 Market Size and Forecast, Global, 2018 - 2027
- 3.2 Market Share by Application, 2021
- 3.3 Market Share by Geography, 2021
- 3.4 Market Drivers and Restraints
- 3.5 Structure of the Market and Key Participants
- 3.6 Expert Opinion on Middle-East Aircraft Engine MRO Market

4 MARKET DYNAMICS

- 4.1 Market Overview
- 4.2 Market Indicators
- 4.3 Market Drivers
- 4.4 Market Restraints
- 4.5 Market Trends
- 4.6 Porter's Five Forces Analysis
 - 4.6.1 Bargaining Power of Buyers/Consumers
 - 4.6.2 Bargaining Power of Suppliers
 - 4.6.3 Threat of New Entrants
 - 4.6.4 Threat of Substitute Products
 - 4.6.5 Intensity of Competitive Rivalry

5 MARKET SEGMENTATION (Market Size and Forecast by Value - USD billion, 2018 - 2027)

- 5.1 Application
 - 5.1.1 Commercial Aviation
 - 5.1.2 Military Aviation
 - 5.1.3 General Aviation
- 5.2 Geography
 - 5.2.1 Saudi Arabia
 - 5.2.1.1 By Application
 - 5.2.2 United Arab Emirates

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- 5.2.2.1 By Application
- 5.2.3 Turkey
 - 5.2.3.1 By Application
- 5.2.4 Egypt
 - 5.2.4.1 By Application
- 5.2.5 Qatar
 - 5.2.5.1 By Application
- 5.2.6 Rest of Middle-East
 - 5.2.6.1 By Application

6 COMPETITIVE LANDSCAPE

- 6.1 Company Profiles
 - 6.1.1 Safran SA
 - 6.1.2 General Electric Company
 - 6.1.3 Rolls Royce Holding PLC
 - 6.1.4 Pratt & Whitney (Raytheon Technologies Corporation)
 - 6.1.5 Lufthansa Technik AG
 - 6.1.6 Jordan Aircraft Maintenance Limited
 - 6.1.7 Lockheed Martin Corporation
 - 6.1.8 CFM International
 - 6.1.9 Honeywell International Inc.
 - 6.1.10 AMMROC
 - 6.1.11 Emirates Engineering
 - 6.1.12 Sanad
- 6.2 Other Players
 - 6.2.1 Saudia Aerospace Engineering Industries
 - 6.2.2 STS Aviation Group Inc.
 - 6.2.3 Ethiopian Airlines
 - 6.2.4 EGYPTAIR MAINTENANCE & ENGINEERING
 - 6.2.5 Turbine Engine Maintenance Repair and Overhaul (Pty) Ltd

7 MARKET OPPORTUNITIES

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