

Africa Aviation MRO - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Africa Aviation MRO Market size is estimated at USD 1.49 billion in 2024, and is expected to reach USD 1.72 billion by 2029, growing at a CAGR of 2.91% during the forecast period (2024-2029).

The COVID-19 pandemic devastated African economies and brought air connectivity across the continent to a virtual standstill. The reduced flight activity is expected to translate into a weaker MRO demand in the region. At the same time, business aircraft and on-demand service providers witnessed better flight movements than the aircraft of scheduled airlines. Cargo demand rose in 2021 due to companies aiming at loss reduction by becoming more active in the cargo transport sector and converting some of their passenger aircraft to freighters.

Furthermore, the African aviation industry lags behind the rest of the world in terms of both demand and supply. By the end of 2021, Africa was the region that had the least commercial aircraft on order in the world. The fleet growth is expected to be constrained over the next decade by geopolitical tensions, unreliable safety records, high airport fees, and high taxes on jet fuel.

There is currently a limited local infrastructure to support the aviation MRO aftermarket in Africa. Only a handful MROs in the region can perform all types of MRO services. Although the MRO industry in the region is smaller than in other regions of the world, the existing MROs are trying to increase their capabilities through strategic partnerships and expansion activities. Foreign players are trying to expand their footprint in the region and find opportunities by capitalizing on the shortcomings in the region's MRO capabilities.

Africa Aviation MRO Market Trends

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Fixed-wing Aircraft Held the Largest Market Share in 2021

The average age of the fixed-wing aircraft fleet operating in Africa is over 15 years, signifying a potential struggle for fleet modernization and aviation infrastructure development. To capture the growing market opportunities, companies are robustly expanding their services in various countries in the region. For instance, in March 2022, Egyptair Maintenance & Engineering announced that it had begun to provide line maintenance services at the Kotoka International Airport in Accra, Ghana. Also, some countries are procuring new aircraft to strengthen their defense fleet. For instance, in June 2022, the Libyan Air Force (LAF) signed an agreement with Turkish Aerospace Industries (TUSAS) to acquire the Hurkus-C light trainer and combat aircraft. The aircraft is motorized by a PT6A-68T turboprop and has an extreme cruise speed of over 570 km/h, with a range of nearly 1,500 km.

Furthermore, there are several outstanding orders for fixed-wing aircraft from many countries, which is expected to increase the aircraft fleet in the region in the future. Nevertheless, new aircraft orders in Africa are expected to be constrained over the next decade by geopolitical tensions, unreliable safety records, high airport fees, and high taxes on aviation fuel. As the fleet ages, annual MRO expenditure toward retrofitting general, military, and commercial aviation fleet is expected to increase.

Egypt Dominated the Market in 2021

The growing airline industry in Egypt is generating significant demand for MRO services. The Middle East is the largest market for passenger flows to and from Egypt, followed by Europe and Africa. The country's geographic location has also helped it emerge as a major aviation MRO hub in Africa, with several foreign MRO players having facilities in Egypt. Egyptair Maintenance & Engineering, a subsidiary of the Egyptair Holding Company, is one of the major MRO providers in the Middle East and Africa. The company has the capability to service and maintain several Airbus, Boeing, and Embraer aircraft. Its hangars can accommodate up to 12 slots for narrow-body and wide-body aircraft. The company provides line maintenance services for over 100 aircraft operators at eight domestic outstations in Egypt and 14 international outstations. In March 2022, the European Aviation Safety Agency (EASA) renewed its approval for the company's facilities at Cairo Airport.

Egypt also has the largest fleet of military aircraft in Africa, comprising 338 combat aircraft, 313 combat helicopters, 11 special mission aircraft, 59 transport aircraft, and 341 trainer aircraft. Over the last five years, the Egyptian Air Force has upgraded its inventory and has placed several orders for new aircraft and helicopters to enhance the aerial combat and surveillance capabilities of its Air Force. For instance, in January 2022, The United States approved the sale of 12 Lockheed Martin C-130J Hercules airlifters to Egypt for USD 2.2 billion. Thus, with the growth of the fleet in the coming years, and the modernization plans for the existing aircraft fleet, there may be a significant demand for military aircraft MRO from Egypt during the forecast period. Furthermore, the business jet market has emerged in Egypt over the last decade. The growth in business jet flight activity and increase in fleet size is likely to generate demand for MRO services in Egypt in the years to come.

Africa Aviation MRO Industry Overview

The African aviation MRO market is fragmented, with the presence of many local and foreign MRO providers offering various types of services to the aircraft operators in the region. Raytheon Technologies Corporation, Safran SA, Lufthansa Technik, Leonardo SpA, and Airbus SE are some of the prominent players in the market. Over the last few years, there has been an increase in investments by foreign players aiming to increase their geographic footprint in Africa. Several local players are partnering with OEMs to gain technical expertise and the MRO certification required to perform on-site MRO services. For instance, Caverton Offshore Support Group PLC, one of the leading providers of marine, aviation, and logistics services in Nigeria, commenced the operations of its MRO facility in Lagos, Nigeria, in the second half of 2021. With the increasingly competitive environment in the MRO sector, the local players are enhancing the efficiency of their MRO processes. The market opportunities of the MRO sector in Africa and the growing investments of players are expected to rapidly increase the competition in the market in the coming years.

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