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Middle East and Africa Aviation - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2016 - 2029

Market Report | 2022-11-21 | 276 pages | Mordor Intelligence

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Report description:

The Middle East and Africa Aviation Market size is estimated at USD 28.20 billion in 2024, and is expected to reach USD 41.78 billion by 2029, growing at a CAGR of 8.18% during the forecast period (2024-2029).

Key Highlights
-Commercial Aviation is the Largest Aircraft Type : Increasing air passenger traffic and its recovery to pre-pandemic levels, coupled with replacing existing aircraft with advanced sustainable aircraft, is driving the commercial aviation market.
-Passenger Aircraft is the Largest Sub Aircraft Type : The sub-aircraft type segment is dominated by passenger aircraft. Increasing air passenger traffic coupled with the growth of the middle-class population in emerging countries drives the market growth.

Middle East and Africa Aviation Market Trends

Commercial Aviation is the largest Aircraft Type

- The economic condition in Middle East & Africa is looking stable as the GDP of the region increased by 20% over 2021 and by 17% compared to the pre-pandemic levels. As of June 2022, the region's aviation sector supported a total of 11.1 million jobs and USD 276 billion in the GDP.
- During the forecast period, the commercial aviation segment is anticipated to expand with higher growth. The rising vaccination availability made international and domestic travel possible in 2022. With the reopening of international routes and long-haul flights, the demand for passenger aircraft is projected to increase by 66% during the forecast period (2022-2028).

- Due to a significant number of HNWIs and UHNWIs, the Middle East has proven to be a lucrative industry for the business aviation sector. From 2016 to 2021, HNWIs in the Middle East increased by 86%, while those in Africa increased by 19%. Due to their high level of luxury and comfort, business jets with large cabins and extended ranges are in high demand in the Middle East. As of July 2022, large jets accounted for 50% of the Middle Eastern fleet and 36% of the African fleet.

- Military aviation in Middle East & Africa is expected to witness impressive growth in the coming years, owing to various aircraft procurement plans by Turkey, Kuwait, Qatar, and Bahrain. Military spending in Africa increased by 6% and by 8% in the Middle East. Fixed-wing aircraft may account for higher growth as countries in the region are investing heavily in the modernization of their aging military fleets and procuring next-generation aircraft.

United Arab Emirates is the largest Country

- The Middle Eastern region had a share of around 6.5% of the global air passenger traffic as of April 2022. The airline companies of the Middle East witnessed a 265% rise in demand in April 2022 compared to April 2021. Similarly, the African region had a share of around 1.9% of the global air passenger traffic as of April 2022. The airline companies of the African region witnessed a 116.2% rise in demand in April 2022 compared to April 2021.
- The deliveries in the commercial aircraft segment witnessed a decline of around 48% in 2020. The OEMs experienced problems such as a halt in production, supply chain and transportation issues due to lockdowns, and travel restrictions that impacted the domestic and international routes. During the forecast period, around 1,080+ commercial aircraft are expected to be delivered to Middle East & Africa.

- In the general aviation sector, Turkey was the leading country in terms of the active operational fleet of business jets, with around 22.3% of the overall Middle Eastern business jet fleet, followed by Saudi Arabia, the United Arab Emirates, and Israel, with around 20% each and 12% of the deliveries as of July 2022. In Africa, South Africa and Nigeria accounted for 25% and 23% of the business jet fleet, respectively.

- The defense expenditure in the Middle East was around USD 187 billion in 2021, a decline of over 3% compared to 2020, and around USD 40 billion in Africa in 2021, with an increase of over 1% from 2020. During the forecast period, the active fleet may increase in the region, as Middle Eastern countries like the UAE, Saudi Arabia, Qatar, and Turkey are expected to procure newer aircraft for fleet upgradation.

Middle East and Africa Aviation Industry Overview

The Middle East and Africa Aviation Market is fairly consolidated, with the top five companies occupying 73.98%. The major players in this market are Airbus SE, General Dynamics Corporation, The Boeing Company, Turkish Aerospace Industries and United Aircraft Corporation (sorted alphabetically).

Additional Benefits:

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

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