

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

Market Report | 2024-02-17 | 90 pages | Mordor Intelligence

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Report description:

The Middle East and Africa Military Helicopters Market size is estimated at USD 1.47 billion in 2024, and is expected to decline to USD 0.92 billion by 2029.

Key Highlights

- Multi-Mission Helicopter is the Largest Body Type : The ability to perform various combat missions is attracting countries to focus more on procuring these helicopters.
- Turkey is the Largest Country : The country's focus on tactical reconnaissance and attack aircraft to support its Air Force's border operations is acting as a catalyst for its dominant position in the region.

Middle East and Africa Military Helicopters Market Trends

Multi-Mission Helicopter is the largest Body Type

- The regional armed forces are modernizing the capabilities of helicopters with cutting-edge technologies to gain a military edge. During the forecast period, multi-mission helicopters are expected to record the highest CAGR. Multi-mission helicopters can provide close air support to ground troops and conduct anti-tank operations to destroy enemy armor.
- There are currently 3,118 combat helicopters in operation in Middle East & Africa. With a 474-helicopter operational force, Turkey possesses the most combat helicopters in the region. Egypt and Algeria have active fleets of 313 and 276 combat helicopters, respectively, after Turkey.

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- Turkey, Algeria, and Egypt are anticipated to purchase most of the helicopters throughout the forecast period. Egypt plans to buy 24 EW-149 multi-mission helicopters by 2024. By 2024, Algeria plans to purchase 42 Mi-28 attack helicopters. Around 160 helicopters will likely be purchased by Turkey, including 109 S-70 utility helicopters. By 2026, all the helicopters are expected to be delivered.

- Earlier in 2018, the United Arab Emirates signed a USD 242 million contract with The Boeing Company for the procurement of 17 Apache AH-64E attack helicopters, expected to be delivered by 2023. Turkey is currently developing a new T629 attack helicopter, with a total displacement of six tons, lighter than its T129 ATAK predecessor. By the second half of 2020, Turkish Aerospace Industries started delivering ATAK FAZ 2 helicopters.

Turkey is the largest Country

- The defense expenditure in the Middle East was around USD 157 billion in 2021, with a decline of over 8.6% compared to 2020, while in Africa, it was around USD 41 billion in 2021, with an increase of over 6% from 2020.

- The Gulf region continues to be fragmented due to geographic tensions between the countries in the region. Saudi Arabia, Egypt, Qatar, the UAE, and Algeria are the major arms importers globally. They also have active programs for procuring combat and utility helicopters in the rotorcraft segment. These countries are expected to procure newer rotorcraft for fleet upgradation during the forecast period.

- Some major procurements during 2016-2021 were Boeing's AH-64E combat helicopters by the UAE and the procurement of 48 CH-47F Chinook heavy-lift helicopters by Saudi Arabia.

- During 2016-2021, the active rotorcraft fleet grew by around 8% in the Middle East and 10% in Africa. This growth was driven by the overt intervention of regional powers and ongoing conflicts between Iran, Saudi Arabia, and the UAE. The US, France, and Russia are the major supplier nations of rotorcraft in this region. Apart from the major countries, small countries such as Morocco and Nigeria are also increasing their defense budgets due to the ongoing tensions with Algeria.

- All such factors are expected to drive the spending on various types of military rotorcraft in the region during the forecast period.

Middle East and Africa Military Helicopters Industry Overview

The Middle East and Africa Military Helicopters Market is fairly consolidated, with the top five companies occupying 97.72%. The major players in this market are Airbus SE, Leonardo S.p.A, Lockheed Martin Corporation, Robinson Helicopter Company Inc. and Turkish Aerospace Industries (sorted alphabetically).

Additional Benefits:

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

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