

Middle-East Aircraft MRO - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Middle-East Aircraft MRO Market size is estimated at USD 6.18 billion in 2024, and is expected to reach USD 7.14 billion by 2029, growing at a CAGR of 2.91% during the forecast period (2024-2029).

Middle-East has been a transit gateway for international flights. The COVID-19 pandemic has disrupted several vital and profitable routes due to the imposition of travel restrictions. As per Airports Council International, the pre-COVID baseline for passenger traffic in the Middle-East was 431 million in 2020 and 453 million in 2021. However, the devastating impact of COVID-19 can be seen in the revised forecast which depreciates the annual passenger traffic by 68.5% and 59.4% in 2020 and 2021, respectively.

The Middle-East Aircraft MRO Market is driven by the increasing demand for new aircraft as part of the fleet expansion and modernization programs initiated by airlines operating in the region. Besides, the increasing partnership between aircraft MRO providers is also expected to drive their technical capabilities, enabling them to service new-generation aircraft that are being procured by airlines. However, the early retirement of widebody jets due to COVID-19 is anticipated to impact the aircraft MRO sector since aircraft with an average age of over 10 years account for an above-average share of MRO spending as they start requiring heavy maintenance checks. Moreover, the shortage of aviation maintenance technicians has been a growing problem for years and the demand for qualified technicians is further heightened by the technological changes in aircraft manufacturing. With the addition of newer generation aircraft platforms, there is expected to be an increase in demand for a newer, wider range of skillsets for the aircraft maintenance technicians, further complicating the expected labor shortage.

Middle-East Aircraft MRO Market Trends

Engine MRO to Witness Higher Growth During the Forecast Period

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The engine is one of the few components in an aircraft that requires continuous maintenance irrespective of the usage of aircraft. The increasing complexity of new generation engines has rendered engine MRO as one of the most expensive MRO sectors as an increasing number of engine failures due to improper MRO has made aircraft operators focus on engine health.

In the engine MRO sector, OEMs control approximately half of the market, 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 MRO-support programs. Hence, most projects in the Middle East are partnerships of airlines or third-party providers with engine OEMs. Also, foreign MRO groups, such as Air France Industries KLM Engineering & Maintenance (AFI KLM E&M) and Lufthansa Technik (LHT), have also scaled up their MRO activities in the region through partnerships and collaborations in recent years. For instance, in 2019, Rolls Royce expanded its global service network with a new independent Trent 700 authorized maintenance center (AMC) at Abu Dhabi International Airport. Under the USD 6.5 billion agreement spanning nine years, Sanad Aerotech (formerly Mubadala Aerospace Turbine Services & Solutions) has been certified to provide engine-overhaul and component-repair services to global operators. Moreover, Sanad Aerotech was the first MRO partner within GE Aviation's global services network to obtain MRO certification for the GEnx engine and remains the only certified GEnx MRO partner in the Middle East and North Africa (MENA) region. The provider plans to expand its existing maintenance and repair services to include the full overhaul of 315 GEnx engines until 2035. Such developments are envisioned to increase the competition in the region, and thereby, drive the engine MRO segment during the forecast period.

United Arab Emirates to Dominate the Market During the Forecast Period

Although the United Arab Emirates boasts of robust aviation infrastructure, the country's MRO operators lack price competitiveness, primarily due to the lack of a home-grown workforce, which has resulted in higher labor costs. Nevertheless, with the COVID-19 pandemic deleteriously affecting the country's aviation sector, a steady rise in business opportunities is envisioned as airlines seek MRO services to maintain the airworthiness of their grounded fleet. On this note, in June 2020, Etihad Engineering, the MRO arm of Etihad Aviation Group, expanded its operations in aircraft maintenance and parking, to meet the new requirements of airline operators, as fleets have been grounded due to the COVID-19 pandemic.

Third-party MRO service providers are also collaborating with the MRO wings of major airlines to enhance their target audience. For instance, in November 2019, Sanad, a merged entity comprising three companies, Sanad Aerotech, Sanad Powertech, and Sanad Capital, signed a cooperation agreement with the Emirates Engine Maintenance Center (EEMC) to foster collaboration and knowledge sharing and 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. Such developments will propel the growth of the aircraft MRO market in the UAE.

Middle-East Aircraft MRO Industry Overview

Saudia Aerospace Engineering Industries and Emirates Engineering is a prominent player in the Middle-East Aircraft MRO Market, followed by Rolls Royce, Raytheon Technologies Corporation, and Etihad Airways Engineering LLC among others. MRO service providers in the region are expanding their offerings and collaborating with domestic airlines as well as international airlines. In May 2022, Sanad, a global aerospace engineering and leasing company wholly-owned by Abu Dhabi's Mubadala Investment Company PJSC (Mubadala), and Triumph Group, Inc., a US-based aerospace manufacturer and MRO provider, with significant engine component repair experience, announced the signing of a memorandum of understanding (MOU) outlining their plans to collaborate on the provision of next-generation engine Maintenance, Repair and Overhaul (MRO) capabilities in the United Arab Emirates (UAE). With the growing support from the government to boost the aviation industry in the Middle East countries, it is anticipated that the MRO market in this region will be more competitive by the end of the forecast period.

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