Middle-East and Africa Military Aviation - 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 Aviation Market size is estimated at USD 6.75 billion in 2024, and is expected to reach USD 8.73 billion by 2029, growing at a CAGR of 5.28% during the forecast period (2024-2029).

Key Highlights
-Largest Market by Sub-Aircraft Type - Fixed-Wing Aircraft : Focus on enhancing combat capabilities by procuring technologically-advanced combat aircraft across most of the countries in the region helps in the market growth.
-Fastest-growing Market by Sub-Aircraft Type - Fixed-Wing Aircraft : Ongoing geopolitical tensions and conflicts across the world are leading the region to procure advanced multi-role aircraft to enhance its combat superiority.
-Largest Market by Body Type - Multi-Role Aircraft : Countries in the region are opting for multi-role aircraft to perform ground strikes, air superiority, and suppress the enemy air defenses.
-Largest Market by Country - Qatar : The country's procurement of various military equipment is directed toward its focus on developing interoperability and combined readiness of its armed forces.

MEA Military Aviation Market Trends

Fixed-Wing Aircraft is the largest Sub Aircraft Type

- There have been ongoing civil wars in Syria, Iraq, Yemen, and Libya in the Middle East during the past few decades. For instance, the nations in and around the Persian Gulf engage in border conflicts and spend a considerable amount on the procurement of

defense equipment, including aircraft and rotorcraft. These nations consist of Iran, Iraq, Kuwait, Oman, Saudi Arabia, Bahrain, and the United Arab Emirates (UAE).
- The government of Saudi Arabia is planning to increase the local military equipment spending to 50% by 2030 to strengthen its local manufacturing under Vision 2030. The government is encouraging local manufacturing through contracts and other support initiatives. Although the country does not have indigenous aircraft development capabilities, it manufactures foreign aircraft under license.
- During the forecast period, the multi-role segment in fixed-wing military aircraft is expected to witness the highest growth. The major reason behind this growth is that several countries, such as the UAE, Egypt, Nigeria, and Turkey, are procuring next-generation combat aircraft and replacing their aging fleets. For instance, the UAE plans to procure 80 Rafael, and Qatar will procure 72 F-15s. While Egypt, Algeria, and Tukey are likely to procure a total of around 40 combat aircraft.

- In the helicopter segment, multi-mission helicopters are expected to see the highest growth during the forecast period. Countries in this region will procure multi-mission helicopters to enhance overall combat capabilities. By 2024, Egypt will purchase 24 EW-149 multi-mission helicopters. Algeria intends to buy 42 Mi-28 attack helicopters by 2024, and Turkey plans to buy over 160 helicopters.

Qatar is the largest Country

- The defense expenditure in the Middle Eastern region was around USD 157 billion in 2021, with a decline of over 8.6% as compared to 2020, whereas in Africa, it was around USD 41 billion in 2021, with an increase of over 6% from 2020.
- The countries such as Saudi Arabia (11%), Egypt (5.7%), Qatar (4.6%), UAE (2.8%), and Algeria (2.6%) are the major arms importers globally during 2017-2021 and have active procurement programs for procurement of multirole as well as utility aircraft in both fixed-wing and rotorcraft segment.
- The major procurements such as 50 Lockheed Martin F-35 fighter jets by UAE, the procurement of 30 Rafale fighter jets by Egypt worth USD 4.5 billion, and the procurement of 25 modified UH-60M helicopters by Saudi Arabia are some of the major procurements that happened in the region during 2016-2021. The aircraft active fleet will increase in the region as Middle East countries like UAE, Saudi Arabia, Qatar, and Turkey are expected to procure newer aircraft for fleet modernization and expansion during the forecast period.

- During 2016-2021, procurement grew around 4% in the Middle East & Africa region. This growth was driven by overt intervention by regional powers and ongoing conflicts such as between Iran, Saudi Arabia, and UAE. The US, France, and Russia are the major supplier nations of multi-role aircraft in this region. Along with this, fleet up-gradation and replacement programs for the aging fleet are expected to aid in the growth of the military aviation market in the region.

MEA Military Aviation Industry Overview

The Middle-East and Africa Military Aviation Market is fairly consolidated, with the top five companies occupying 88.53%. The major players in this market are Airbus SE, Lockheed Martin 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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