

Saudi Arabia Aviation Market Assessment, By Aircraft Type [Commercial Aircraft, General Aviation, Military Aircraft, Helicopter, Electric and Hybrid Aircraft], By Service Type [Passenger Transport, Cargo Services, Leasing Services, MRO, Aviation Consultancy], By End-user [Airlines, Military and Defense, Corporate Sector, Private Individuals, Air Cargo Operators, Airport Operators], By Region, Opportunities and Forecast, 2018-2032F

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Report description:

Saudi Arabia's aviation market is projected to witness a CAGR of 6.50% during the forecast period 2025-2032, growing from USD 7.08 billion in 2024 to USD 11.71 billion in 2032. The market has experienced significant growth in recent years and is expected to maintain a strong pace of expansion in the coming years. The Saudi Arabia aviation market is experiencing rapid growth, the rising demands for air travel are mainly triggered by the expansion of domestic and international airlines, boosted by the emergence of low-cost carriers, which have positively influenced market dynamics.

In September 2024, Aviation Services Management (ASM) opened a new office in Saudi Arabia for ASM to enhance its presence in the Middle East. The company has entered a joint venture with a local operator that navigates regulations and improves the delivery of services. This expansion aims to meet the growing demand of aviation fueling, flight planning services, and other aviation services in Saudi Arabia.

Expansion of the Air-Passenger Traffic Drives the Saudi Arabia Aviation Market Demand

Air-passenger traffic expansions are a significant growth driver in the Saudi Arabia aviation market. The growing interest in both domestic and international travel to the country demonstrates the developing trend in aviation. Improvement in connectivity with the addition of new airlines and the entry of low-cost carriers are supporting aspects, making air travel much more accessible to

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the passengers. In addition, investment in airport infrastructure and modernization is expected to help sustain this upward trend and allow the aviation industry to handle more passengers efficiently. Given the government's efforts at diversifying the economy away from oil, aviation remains one of the more substantial pillars for economic development, allowing opportunities for stakeholders to thrive while fostering an advanced and comfortable travel ecosystem. The expansion of air-passenger traffic emphasizes the prospect of long-term growth within the Saudi Arabia aviation market.

For instance, in July 2023, Saudia Airlines expanded its fleet with the addition of the Airbus A321neo aircraft under the slogan "A neo-way of flying." This marks the first of 20 A321neo aircraft set to join the fleet by 2026. The aircraft features advanced fuel efficiency, reduced carbon emissions, and enhanced passenger comfort, aligning with Saudia's goals to support Saudi Vision 2030 and promote sustainable aviation.

Advances in Military Aviation Propels the Saudi Arabia Aviation Market Growth

Escalating geopolitical tensions are significant growth drivers of military aviation advances. So far, regional security has intensified the Saudi government's decision to modernize and expand its military capabilities by investing in a better arsenal of advanced aircraft and technologies. While focusing on strengthening defense infrastructure also prompts economic growth within the wider aviation sector. The urgent need for high-tech military aircraft and support systems encourages collaboration among local and global defense organizations in developing innovative and advanced technologies. Moreover, Saudi Arabia's significance in regional security dynamics adds importance to its contribution to the global defense sector. With the evolving geopolitics challenging military aviation's status quo in all respects.

For instance, in November 2024, the United Defense Company announced the production of eight types of drones powered with AI aimed at enhancing military capabilities. This further indicates that Saudi Arabia strives to boost defense sector modernization under the growing geopolitical challenges. Increasing investments in military aviation by Saudi Arabia, is expected to further growth within this field of aviation and open more avenues for collaboration between local manufacturers and international defense contractors.

Commercial Aircraft Dominate the Saudi Arabia Aviation Market Share

Commercial aircraft dominate the Saudi Arabia aviation market and reflect the sector's robust growth and strategic importance. Growing demand for commercial aviation arises from a rise in passenger traffic with the addition of new airlines to the network as the country continues to strive to enhance its position as a regional aviation hub. Due to the emphasis on efficiency and passenger experience, airlines are increasingly focused on acquiring new aircraft to modernize their fleets. Moreover, the rapid growth of low-cost carriers adds to commercial aviation's growth factors, making flying accessible to a more extensive section of the population. Government initiatives supporting tourism growth and diversification in the economy also boost the commercial aircraft segment. Growth in commercial aviation contributes to the market.

For instance, in July 2024, flynas Company LCC, a Saudi Arabia low-cost carrier, signed a landmark agreement with Airbus SE to purchase 160 new aircraft, including 30 wide-body A330neo and 130 narrow-body A320 family models. This deal doubles flynas' total aircraft orders to 280, supporting Saudi Vision 2030 by enhancing connectivity and expanding its network of regional and international routes. Deliveries are set to begin in 2027.

Riyadh is Expected to Dominate the Saudi Arabia Aviation Market Size

Riyadh, the central region, which has the advantage of strategic location and massive infrastructure expansion, is expected to lead Saudi Arabia aviation market. It is a crucial transportation hub connecting Saudi Arabia internationally and domestically. Advanced development of airport facilities and improvement in air traffic management systems are Riyadh's major priorities, making it a hub for commercial aviation growth. Government efforts to develop tourism and economic diversification are the forces further supporting aviation in the region. The market position of Riyadh is indeed fostered by the presence of large airlines and investments in the modernization of fleets. As the demand for air travel continues to grow, Riyadh will form one of the most vibrant dimensions of Saudi Arabia's future aviation landscape, providing ample opportunities for stakeholders within the industry and an extreme uplift to the travel ecosystem.

For instance, in February 2024, Mace Group, a United Kingdom based construction firm secured the bid for developing the King Salman International Airport (KSIA) in Riyadh. This project is scheduled for completion in 2030 which is expected to handle 120 million passengers in 2030 and scaling the capacity to 185 million by 2050. The airport's planned 57 square kilometers will include six parallel runways depicting the Kingdom's commitment to improving its aviation infrastructure while increasing its passenger

capacity.

Future Market Scenario (2025 - 2032F)

- The Saudi Arabia aviation market is witnessing increase in investments, as airlines continue to procure new aircraft to cater growing passenger demand.
- Green Aviation Leadership: Saudi Arabia will likely spearhead a pioneering cult in the hydrogen-powered aircraft and SAF Hemisphere, paving new landmarks in the Middle East for green aviation.
- Surge in Private Aviation: As the Saudi Vision 2030 attracts high net worth individuals and global investors, demand might substantially rise in private jets and VIP aviation services.
- Integration with NEOM Aviation Infrastructure: This would form part of NEOM, innovative aviation technologies within futuristic airports, and AI-built air traffic management systems for creating an entirely new travel ecosystem.

Key Players Landscape and Outlook

The Saudi Arabia aviation market is dynamic and highly fragmented, with many key participants, such as established airlines and new entrants. Dominant airlines such as Saudia Airlines are constantly increasing their fleet capacity and adding even more services for passengers to explore the aspect of flying. Additionally, Riyadh Air will enter the competitive landscape and strive to be a major player in domestic and international markets.

Innovation and technology development in fleets have been fostered by stakeholder collaboration between locals and internationals, while investments into airport infrastructure observe significance to keep up with rising passenger traffic while enhancing connectivity. The tourism sectors are fueled by the economy, due to constant evolution. This sector opens far-reaching avenues for growth and investment, as well as partnerships that would determine the future lines along which it would develop. For example, in May 2024, Royal Saudi Air Force (RSAF) has made a procurement deal with Airbus SE and ordered four more Airbus A330 Multi-Role Tanker Transport (MMRT) aircraft. The first aircraft is to be converted by 2026 and operational by 2027. This is the third contract signed for the A330 MRTT, further establishing Saudi Arabia as a major operator of this aircraft type. The contract includes a logistics support package and supports Saudi Vision 2030 by emphasizing local industrial cooperation through technology transfer.

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*Companies mentioned above DO NOT hold any order per market share and can be changed according to information available during research work.

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