Africa Aviation MRO - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 150 pages | Mordor Intelligence

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Report description:

The Africa Aviation MRO Market size is estimated at USD 1.61 billion in 2025, and is expected to reach USD 2.04 billion by 2030, at a CAGR of 4.79% during the forecast period (2025-2030).

Key Highlights
- Aircraft operators in Africa have some of the oldest airline fleets in the world. In addition, with the current situation of the aviation industry in Africa, operators will have to operate their current fleets for some more years due to a lack of economic reserves to purchase new aircraft and modernize and expand their fleets. This is expected to increase the demand for MRO activities in the region during the forecast period.
- Dwindling profit margins and maintenance costs have become a very significant expense for the operators in the region. Only a few African airlines, such as Kenya Airways, South Africa, Egypt Air, and Ethiopian Airlines, have well-established in-house maintenance facilities, and many other airlines are sending their fleet outside the continent for major maintenance activities. Thus, the growing number of investments by various companies in the African region will provide a boost to the aviation MRO services in Africa and will drive the growth of the market during the forecast period.
- Africa needs to be at par with the global aviation industry. It has the fewest annual seats in the commercial sector, the smallest fleet of commercial and generation aviation aircraft, and the lowest number of aircraft on order in the world. The aviation sector in the region also faces several challenges that create a uniquely tough operating environment, including weak aviation infrastructure, high ticket prices, poor connectivity, and lack of liberalization and an integrated intra-African network.

Africa Aviation MRO Market Trends

Fixed-Wing Aircraft to Witness Highest Growth During the Forecast Period

- The growth is attributed to the rising aircraft deliveries and increasing expenditure on the aviation sector across the region. The average age of the fixed-wing aircraft fleet in Africa is over 15.5 years, implying a significant need and potential for fleet modernization and aviation infrastructure development in the region. Several countries in the region have adopted fleet migration programs that enables them to procure used aircraft from other regions at discounted prices and entail the re-sale of used aircraft from neighboring regions to increase their active fleet. It is estimated that around 75% of the fleet growth in the region by 2025 will be a direct result of migrations.
- Similarly, in the military aviation sector, the lack of economic stability has led to the countries resorting to procuring used aircraft from partner countries in Europe. For instance, in September 2022, Saab AB signed a support contract for the service, maintenance, and repair of the South African Air Force (SAAF) Gripen C/D fighter jets. The value of the contract was USD 30 million for three years. As per the CAPA Fleet Database, Africa's current commercial aircraft fleet consists of 1,700 aircraft and the outstanding order book of all African airlines combined is around 257 aircraft. Ethiopian Airlines has the largest order book, and although Green Africa Airways has not yet started operating, it has the second largest order book with almost as many orders as Ethiopian Airlines. On a similar note, in February 2020, Green Africa announced placing an additional order for 50 A220-300 aircraft while also committing to lease three aircraft from GTLK Europe. Thus, the growing procurement of commercial and military aircraft and increasing spending on the modernization of the aging aircraft fleet propels the market growth.

Egypt to Dominate the Market Share During the Forecast Period

- The growing airline industry in Egypt is generating significant demand for MRO services. The Middle East is the largest market for passenger flows to and from Egypt, followed by Europe and Africa. The country's geographic location has also helped it emerge as a major aviation MRO hub in Africa, with several foreign MRO players having facilities in Egypt.
- EGYPTAIR and Nile Air are the most prominent airlines in Egypt. EgyptAir is the state-owned flag carrier of Egypt, while Nile Air is the largest private airline in Egypt and is a full-service carrier that operates scheduled services. As of June 2023, the EGYPTAIR mainline fleet comprised 75 aircraft with three A321neos aircraft on order. Similarly, Nile Air operates 6 aircraft, including four A320s and two A321s.
- In December 2023, Safran Aircraft Engines and the Egyptian Air Force announced the signing of a Memorandum of Understanding (MoU) for the company's new EngineLife services solution. According to the terms of the agreement, this MoU will cover through-life support (TLS) for the M88 engines powering Egypt's current fleet of 24 Rafale on a by-the-hour basis with guaranteed levels of availability.
- Thus, the ongoing fleet modernization and expansion plans undertaken by the defense and commercial operators in the country are anticipated to drive the demand for MRO services in the country, thereby driving the market in focus during the forecast period.

Africa Aviation MRO Industry Overview

The African aviation MRO market is fragmented, with the presence of many local and foreign MRO providers offering various types of services to aircraft operators in the region. RTX Corporation, Safran SA, Lufthansa Technik AG, Leonardo S.p.A., and Airbus SE are some of the prominent players in the market.

Over the last few years, there has been an increase in investments by foreign players aiming to increase their geographic footprint in Africa. Several local players are partnering with OEMs to gain technical expertise and the MRO certification required to perform on-site MRO services. With the increasingly competitive environment in the MRO sector, the local players are enhancing the efficiency of their MRO processes. The market opportunities of the MRO sector in Africa and the growing investments of players are expected to rapidly increase the competition in the market in the coming years.

Additional Benefits:

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

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