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INTERNATIONAL

Middle-East and Africa Military Aviation - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 224 pages | Mordor Intelligence

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Report description:

The Middle-East and Africa Military Aviation Market size is estimated at 6.73 billion USD in 2025, and is expected to reach 8.78 billion USD by 2030, growing at a CAGR of 5.47% during the forecast period (2025-2030).

Fixed-wing aircraft is expected to dominate the market during the forecast period

- 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 local military equipment spending to 50% by 2030 to strengthen 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. Egypt, Algeria, and Turkey 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.

Fleet upgradation and replacement programs for the aging fleet driving the demand

- The defense expenditure in the Middle Eastern region was around USD 184 billion in 2022, with a decline of over 3.2% compared to 2022. In contrast, it was around USD 39.4 billion in Africa in 2022, with a decline of around 5% from 2021.
- Countries such as Saudi Arabia (11%), Egypt (5.7%), Qatar (4.6%), UAE (2.8%), and Algeria (2.6%) were major arms importers globally during 2017-2021 and have active programs for procurement of multirole and utility aircraft in the fixed-wing and rotorcraft segment.
- The procurements such as 50 Lockheed Martin F-35 fighter jets by UAE, the 30 Rafale fighter jets by Egypt worth USD 4.5 billion, and the 25 modified UH-60M helicopters by Saudi Arabia were some of the major procurements that happened in the region during 2017-2022. The aircraft's active fleet is expected to increase in the region. Middle Eastern countries like UAE, Saudi Arabia, Qatar, and Turkey are expected to procure newer aircraft for fleet modernization and expansion during the forecast period.
- During 2017-2022, procurement grew around 4% in the Middle East & Africa region. This growth was driven by overt intervention by regional powers and ongoing conflicts between Iran, Saudi Arabia, and UAE. The US, France, and Russia are this region's major supplier nations of multi-role aircraft. Additionally, fleet up-gradation and replacement programs for the aging fleet are expected to grow the region's military aviation market.

Middle-East and Africa Military Aviation Market Trends

Major military powers in the region have surged their defense expenditure

- Defense expenditures in the Middle Eastern region were around USD 184 billion in 2022, a decline of over 3.2% compared to 2021. In contrast, it was around USD 39.4 billion in Africa in 2022, with a decline of over 5% from 2021. Countries such as Saudi Arabia, Egypt, Qatar, United Arab Emirates, and Algeria were the major countries in the region with a high defense expenditure during 2017-22. They have active procurement programs for multi-role and utility aircraft in fixed-wing segments.
- Sub-Saharan Africa's combined military expenditure stood at USD 20.3 billion in 2022, down by 7.3% compared to 2021 and 18% compared to 2013. Nigeria and South Africa, the sub-regions two largest spenders, led the decline in military spending in 2022. In 2022, Israel's military spending fell for the first time since 2009. Its total of USD 23.4 billion was 4.2% lower than in 2021.
- The year-on-year (Y-o-Y) growth in Saudi Arabia's military spending was 16% in 2022 compared to 2021, the first Y-o-Y increase since 2018. Saudi Arabia's military expenditure was estimated at USD 75.0 billion last year. The reduction coincided with accusations that Saudi Arabia had started to remove its military personnel from Yemen. However, the Saudi government denied the allegations and insisted that the personnel were just being redeployed. Since 2015, Saudi Arabia has been leading a coalition in a military campaign against the war-torn nation of Yemen, and the fighting continued into 2022. Saudi Arabia had the second-largest military budget in the world, at 7.4% of GDP, after Ukraine in 2022.

Fleet replacement programs for older aircraft are projected to be the main driver for Middle Eastern military aviation

- As of 2022, the Middle East & Africa had an active fleet of 9,460 aircraft. The total active aircraft fleet increased by 1% in the region compared to 2017. South Africa, Algeria, the United Arab Emirates, Saudi Arabia, Turkey, Egypt, and Qatar accounted for

58% of the total active fleet in the region.
- In the Middle East, defense spending in 2022 totaled USD 157 billion, an increase of 8.6% from 2020 and 5.6% from 2012, respectively. While North Africa accounted for 49%, Sub-Saharan Africa accounted for 51% of the total spending.
- Countries such as Saudi Arabia, Qatar, and the United Arab Emirates are expanding their aircraft fleet size to fulfill the demands of modern warfare. They may continue to produce and acquire next-generation aircraft during the forecast period. The regional armed forces are also enhancing the capabilities of helicopters with cutting-edge technology to obtain military superiority over the external threat.
- Africa's active fleet size decreased by 1% in 2022 compared to 2017. South Africa, Algeria, and Egypt accounted for 45% of the total fleet in Africa. The fleet may increase in the coming years as major countries like Algeria and Egypt plan to procure around 100 aircraft. The Middle East & Africa's active fleet increased by 8% compared to 2017. Saudi Arabia, the United Arab Emirates, Qatar, and Turkey accounted for 59% of the total fleet in the Middle East. During the forecast period, the active aircraft fleet may increase in the region as countries like the United Arab Emirates, Qatar, and Turkey plan to procure around 400 aircraft.

Middle-East and Africa Military Aviation Industry Overview

The Middle-East and Africa Military Aviation Market is fairly consolidated, with the top five companies occupying 80.37%. The major players in this market are Airbus SE, Dassault Aviation, Lockheed Martin Corporation, The Boeing Company 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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